PLANNING AND ZONING BOARD
REGULAR MEETING
THURSDAY, APRIL 07TH, 2022
ASSEMBLY HALL
395 MAGNOLIA ROAD
PINEHURST, NORTH CAROLINA
4:00 PM

Board Members Present:	**Board Members Absent:**	**Staff Present:**
Jack Farrell, 1st Vice-Chair	Jeramy Hooper, Chair	Darryn Burich, Planning Director
Julia Latham, 2nd Vice-Chair	Matt Jones	Alex Cameron, Planning Supervisor
Phillip Shumaker	David Alzamora	Shannon Konstantinou, Clerk to the Board
Louise Mercuro		

Approximately 3 member(s) of the public in attendance.

I. Call to Order

Mr. Farrell called the meeting to order at 04:02 PM, confirmed a quorum was present, and explained the purpose of this meeting. Mr. Farrell noted the absence of Mr. Hooper, Mr. Jones, and Mr. Alzamora.

II. Approval of Minutes

A. 03-03-2022 Regular Meeting Minutes

Ms. Rothstein moved to approve the minutes of the March 03rd, 2022 Regular Meeting. Seconded by Mr. Shumaker. Approved by a vote of 5-0.

B. 03-18-2022 Special Meeting Minutes

Ms. Rothstein moved to approve the minutes of the March 18th, 2022 Special Meeting. Seconded by Mr. Shumaker. Approved by a vote of 5-0.

III. New Business

A. Overview of the Draft Small Area Plans

The Board will continue discussion and be able to provide feedback on the Pinehurst South and Village Place draft Small Area Plans.

This agenda item is only for discussion between Board members and Staff. No action will be taken.

Mr. Burich briefly reviewed the feedback on Village Place from the prior Planning and Zoning Special Meeting on March 18th, 2022.

The Board, Mr. Burich, and Mr. Cameron reviewed the following handouts and pages taken from the Small Area Plans for Pinehurst South: Focus Area Two from the 2019

DRAFT

Comp Plan (Development Status and Use Allocation Tables), Recommended Scenario Plan, Comprehensive Plan 2019 and Small Area Plan Development Programs, Existing Zoning, Locator Map, Purpose, Previous Plans and Studies, PDO Assessment Summary, Existing Conditions, Illustrative Site Plan, Figure Ground, Historic District, Street Network, Posted Speed and Traffic Control, Land Use, Existing Zoning and Permitted Uses, Topography, Open Space + Trails + Sidewalks, Market Analysis Summary, Strengths / Weaknesses / Opportunities / Threats / Challenges, Economic and Demographic Analysis, For Sale Residential, For Rent Residential, Retail, Office, Hospitality, Golf, Summary of Market Opportunity, Public Outreach, Recommendations, Olmsted Planning Principles, Concept Design, Parti / Block Diagram, Concept Design Low Intensity Plan Option, Concept Design High Intensity Plan Option, Final Design Aerial Rendering, Final Design Core Area Bird's Eye Rendering, Core Area Detail Plan, Open Space + Pedestrian Network, Pinehurst South Proposed Central Green, Open Space Detail Plan, Traffic & Transportation, Traffic Impacts of Pinehurst South Build-Out Plan, Proposed Circulation Plan, Proposed Street Section NC-5 / Blake Boulevard, Proposed Street Section – Typical Commercial, Proposed Street Section – Typical Residential, Build-Out Plan Scenario 1 (low), and Build-Out Plan Scenario 2 (high).

The Board, Mr. Burich, and Mr. Cameron discussed the following topics relating to the Small Area Plans for Pinehurst South: the difference between Infill Development Potential and Undeveloped Parcels, area doesn't have the characteristics to support an innovation hub but does have the potential for general offices / medical offices / general retail / golf cluster in the area, the potential to reorient Monticello Dr. and develop a Public Services area, the location of ETJ parcels within the area, the differences between Version C and Version D being spelling / text formatting corrections only, Pinehurst Cottages development project, the blue lines platted on the Street Network page being private or public roads and the ownership of the private roads, how to address the congestion on HWY 5 and the need for NCDOT to partner with the Village to correct the traffic issues, the proposed plans for HWY 5 improvements by the NCDOT and the projected timeline for the improvements, traffic being a greater / wider issue outside of the area and the markers that need to be hit for NCDOT to push the HWY 5 issues to the forefront, the need to have a development plan in place that takes into consideration the traffic issues, the constraints of HWY 5 improvements (rail lines, proximity of dwellings, etc.), the lack of County involvement or feedback, the massive cost of HWY 5 improvements and how cost / property owner rights impact the implementation of the proposed HWY 5improvements, the investment in infrastructure on the part of the Village and how infrastructure investment will drive development in the area, how to incentivize developers to follow the development plan, Public Services locating another small facility in the area to help take care of routine / smaller items in addition to / as substitute to a larger main facility, developers maxing out every square inch of ground and the importance of planning for public spaces in order to incentivize developers to actually build public spaces, the importance of having public space plans in order to drive policy / funding for public spaces, a potential Master Storm Water plan for the entire area and the importance of not using all storm water retention ponds as public open spaces (can be done with wet pond type areas if planned properly),

DRAFT

sidewalks being required on one or two sides of the street, the potential for a golf cart path, the potential for a shared use path, the width of the potential paths, the location of the proposed shared use path, the need for a public space should the land use change from residential to commercial and the need for additional park space within the Village, how the traffic studies are done / information compiled / local vs. through traffic, changes proposed to streets in / around the Harness Track area, the potential locations for future Public Services facilities, the movement of Monticello Dr. to the south providing an additional buffer should the Public Services facilities be relocated to the area, the need for the Board to make recommendations on the Plans prior to the Plans being presented to Council, the need to know what uses / functions would be involved should the Public Services facilities relocate to the area, the impact of Public Services traffic on the surrounding areas and current traffic congestion, question whether proposed uses will "fit" with each other within this area, the question of residential versus commercial in the area, zoning changes being required with adoption of the plans, the process of zoning and planning in relation to public spaces and individual property owner rights (public-private partnership), balancing the concern over pressure to have more residential in the area with the concern over pressure to have more commercial in the area, being considerate of existing residential subdivisions in the area (Jackson Hamlet and future Pinehurst Cottages), requiring developers to include pathways / sidewalks as part of the development approval, the question of the potential benefit of preserving open space while being surrounded by commercial development and the diminished value to this type of park, the difference between community parks versus destination / regional parks, the potential to use the public space in this area for an amphitheater, the location of any Village owned properties within the area, and whether the potential for future general offices / medical offices / general retail / golf cluster are strong enough to plan for these types of use in this area.

Mr. Burich asked the Board for feedback on residential versus commercial zoning within the area:

Mr. Roberts stated low density, look at mixed use communities (communities in Europe as an example), very popular and have everything you need, a variety of single family detached / low density multi-family / mixed use, very appealing to many, types of commercial businesses in this area will not be industrial, more medical / general offices.

Mr. Shumaker stated need to consider whether businesses in this area will cannibalize businesses from the Village Place area and the potential for cool down in housing market in the next 25 years, smarter approach is mixed use with a focus on office commercial core and mixed use, multifamily residential surrounding.

Mr. Farrell stated housing market has been heavier toward investment properties versus long-term residents, commercial / professional use.

Ms. Rothstein stated commercial / professional use.

Ms. Latham stated neighborhood businesses will not want to be where there isn't a neighborhood, need homes nearby, question is what type of neighborhood is trying to be created, mixed use preferred, attractive to younger / active families, meets diversity of need, this is a gateway neighborhood into Pinehurst and visibility is important.

Ms. Mercuro stated mixed use.

The Board, Mr. Burich, and Mr. Cameron discussed the zoning on the western side of HWY 5 remaining the same and potentially removing the Trotter Hills area from consideration in the Small Area Plans due to no zoning changes being needed.

The Board, Mr. Burich, and Mr. Cameron discussed Arnette St. and Olivia Ln. work being done by NCDOT, and the need for the Village to work with NCDOT and the railroad regarding where the crossing of HWY 5 will be located.

The Board, Mr. Burich, and Mr. Cameron discussed the proposed public spaces, the potential to require developers to dedicate 8% of the overall development area to public / open space, the location of public / open spaces along HWY 5 as an entry corridor or storm water management area and to open more development area, and the potential positive quality of life impact public spaces will have within the area.

Mr. Burich briefly reviewed the feedback given at Public Workshop #4 on March 29, 2022.

Mr. Burich stated communication will be sent to the Board regarding scheduling a Work Session meeting, if needed.

IV. Next Meeting Date

A. 05-05-2022 Regular Meeting

V. Motion to Adjourn

Ms. Rothstein moved to adjourn the Regular Meeting. Seconded by Ms. Mercuro. Approved by a vote of 5-0 at 06:17 PM.

Respectfully Submitted,

Shannon Konstantinou
Clerk to the Board &
Planning Administrative Specialist
Village of Pinehurst

A videotape of this meeting is located on the Village website: www.vopnc.org.



VILLAGE OF PINEHURST SMALL AREA PLANS

Existing Conditions Diagrams

JANUARY 7, 2021

Design Collective

DUGGAL REAL ESTATE ADVISORS

Moving forward. RKA RAMEY KEMP ASSOCIATES

1895 VILLAGE OF PINEHURST

Existing Conditions

Locator Map

The Village of Pinehurst boundary encompasses approximately 17.3 square miles of land area. The two Small Area Plan (SAP) boundaries, Village Place and Pinehurst South, are located to the north and south of the Village Center, the historic hub of the community. Between these two focus areas is a variety of housing, lodging accommodations, retail, and recreational amenities, including golf courses, lakes, and walking and biking trails.



KEY

- VILLAGE OF PINEHURST
- SMALL AREA PLAN BOUNDARIES

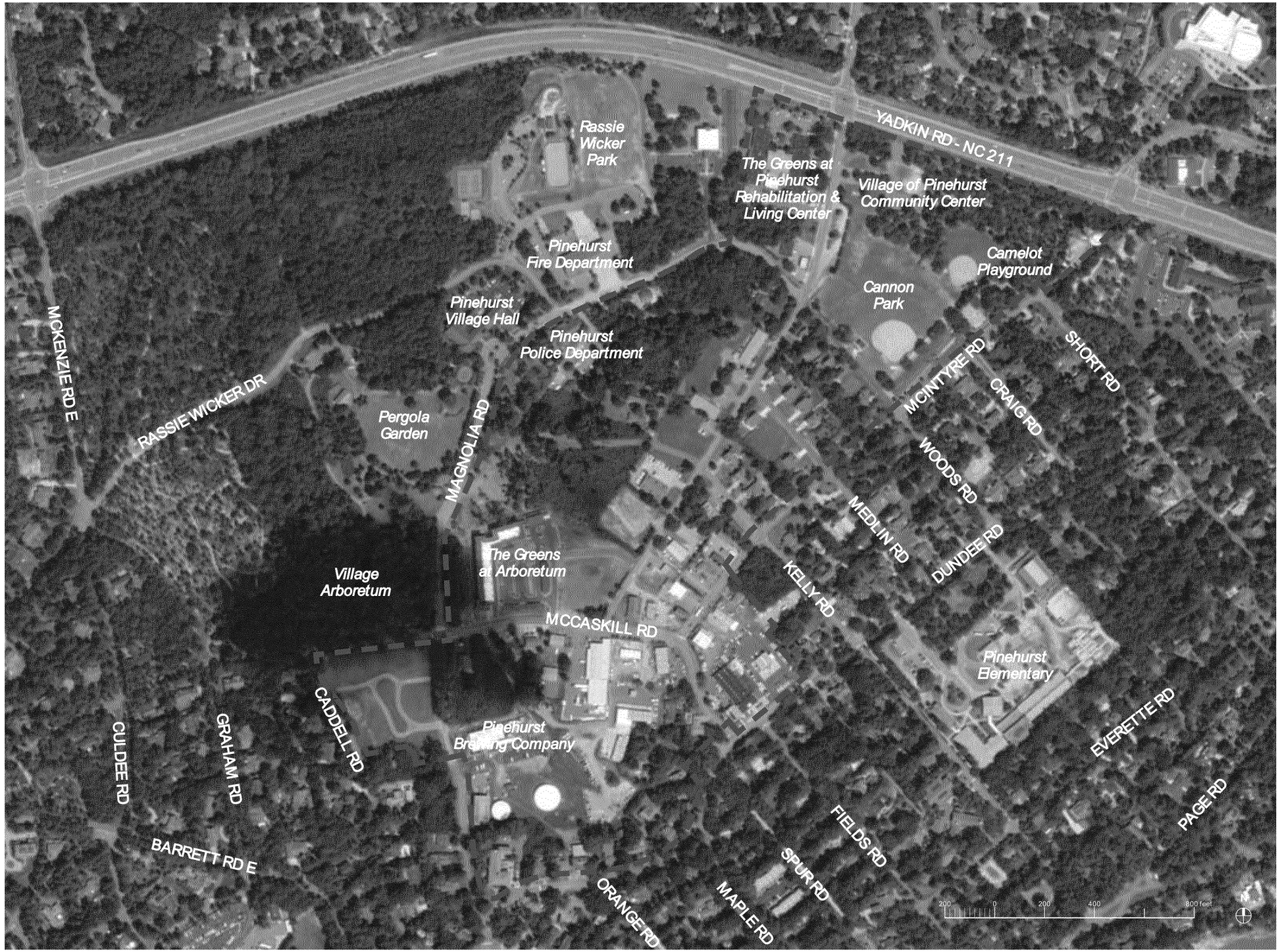
Existing Conditions

Site Aerial

The aerial image shows the Village Place Small Area Plan (SAP) boundary as a brown dashed line.

KEY

- SMALL AREA PLAN (SAP) BOUNDARY
- VILLAGE OF PINEHURST



Existing Conditions

Illustrative Site Plan

The Existing Illustrative Plan depicts the development and open space patterns that exist in the study area. A 1/4-mile walking radius (5-minute walk) is indicated on the plan for reference.

KEY

- SMALL AREA PLAN (SAP) BOUNDARY
- VILLAGE OF PINEHURST
- BUILDING FOOTPRINTS
- PARKS/ OPEN SPACE



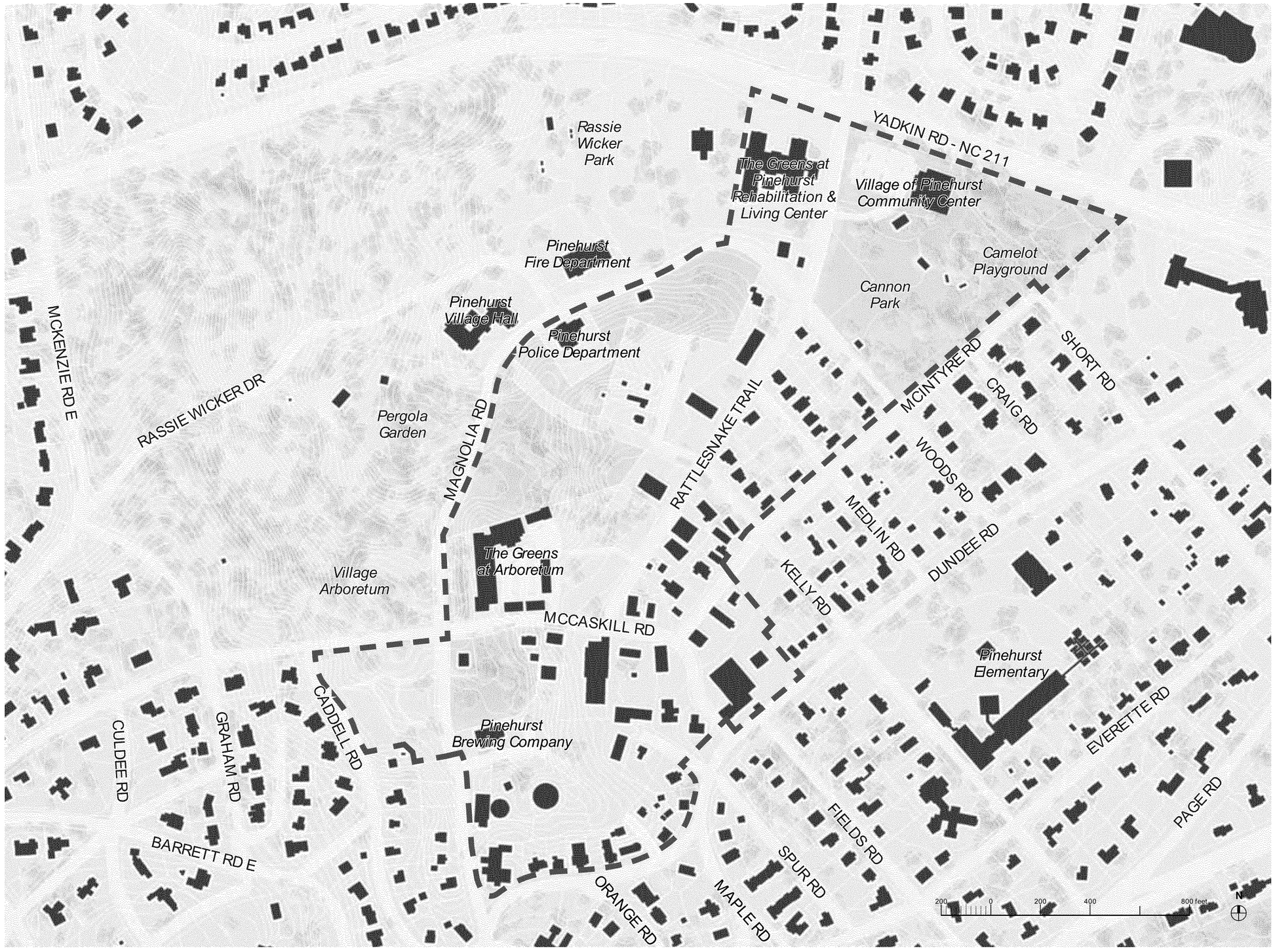
Existing Conditions

Figure Ground

The development patterns in the study area are characterized by single-family detached residential lots surrounded by a mix of non-residential uses and undeveloped properties. The single-family detached residential lots are located primarily between Dundee Road and Rattlesnake Trail, north of McCaskill Road. Institutional buildings such as the Pinehurst Village Hall, Pinehurst Police and Fire Departments, the Village of Pinehurst Community Center, and Pinehurst Elementary are scattered throughout Village Place, primarily surrounding the residential blocks. Larger commercial and industrial building footprints are located along and to the south of McCaskill Road, closer to the Village Center.

KEY

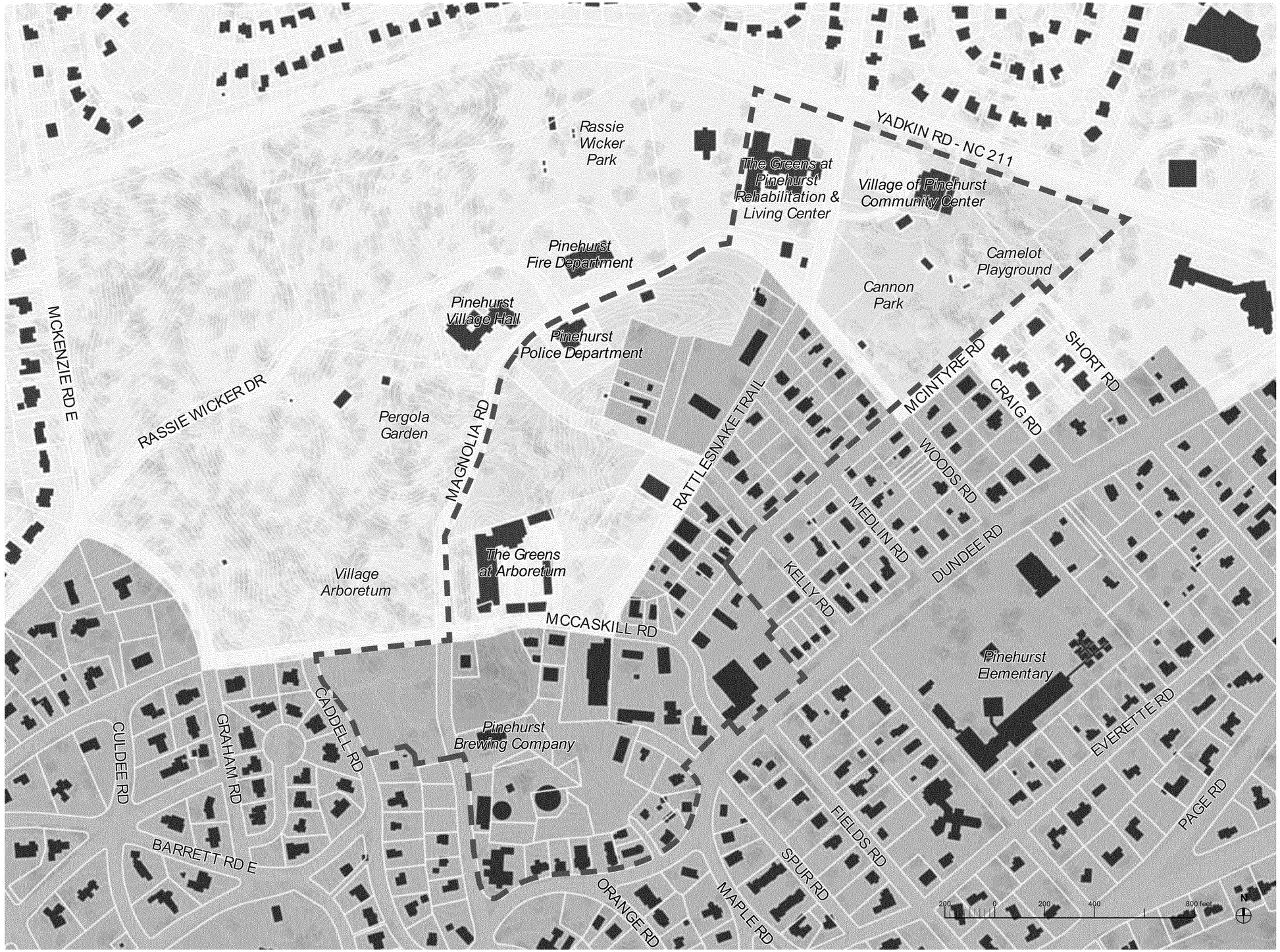
- SMALL AREA PLAN (SAP) BOUNDARY
- VILLAGE OF PINEHURST
- BUILDING FOOTPRINTS



Existing Conditions

Historic District

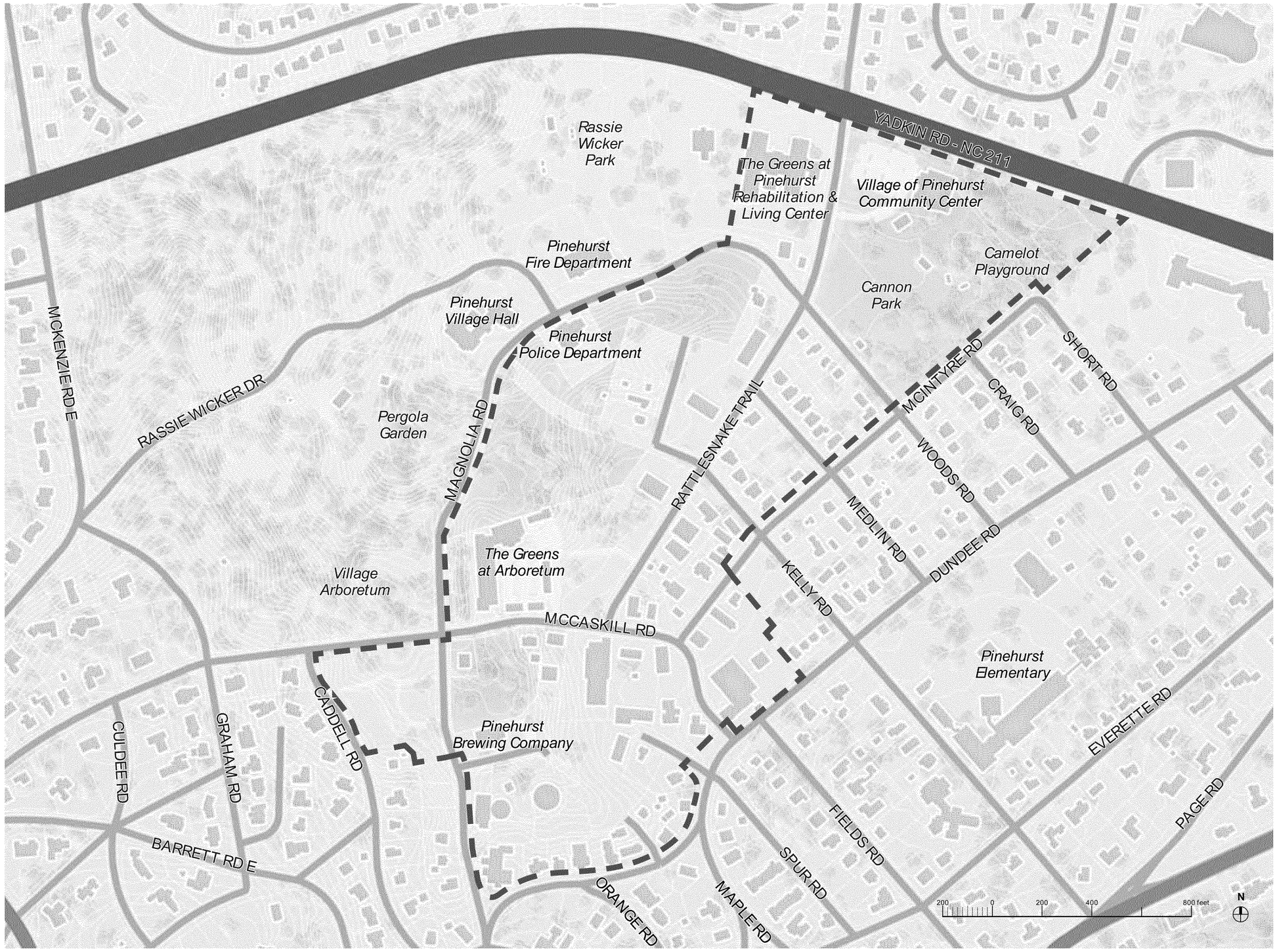
The Historic District is comprised of properties that fall within the National Historic Landmark district or that were surveyed and identified as important fixtures within the community. These properties are subject to additional review by the Historic Preservation Commission and the Historic District Guidelines to ensure the history and charm of the Village of Pinehurst is preserved.



Existing Conditions

Street Network

The study area is well connected to a range of arterials. Yadkin Road - NC 211 lines the north side of the study area boundary providing direct access to US 501 just east of the study area. Neighborhood streets are organic and somewhat disconnected due to large, undeveloped land areas and topographic conditions in the study area.



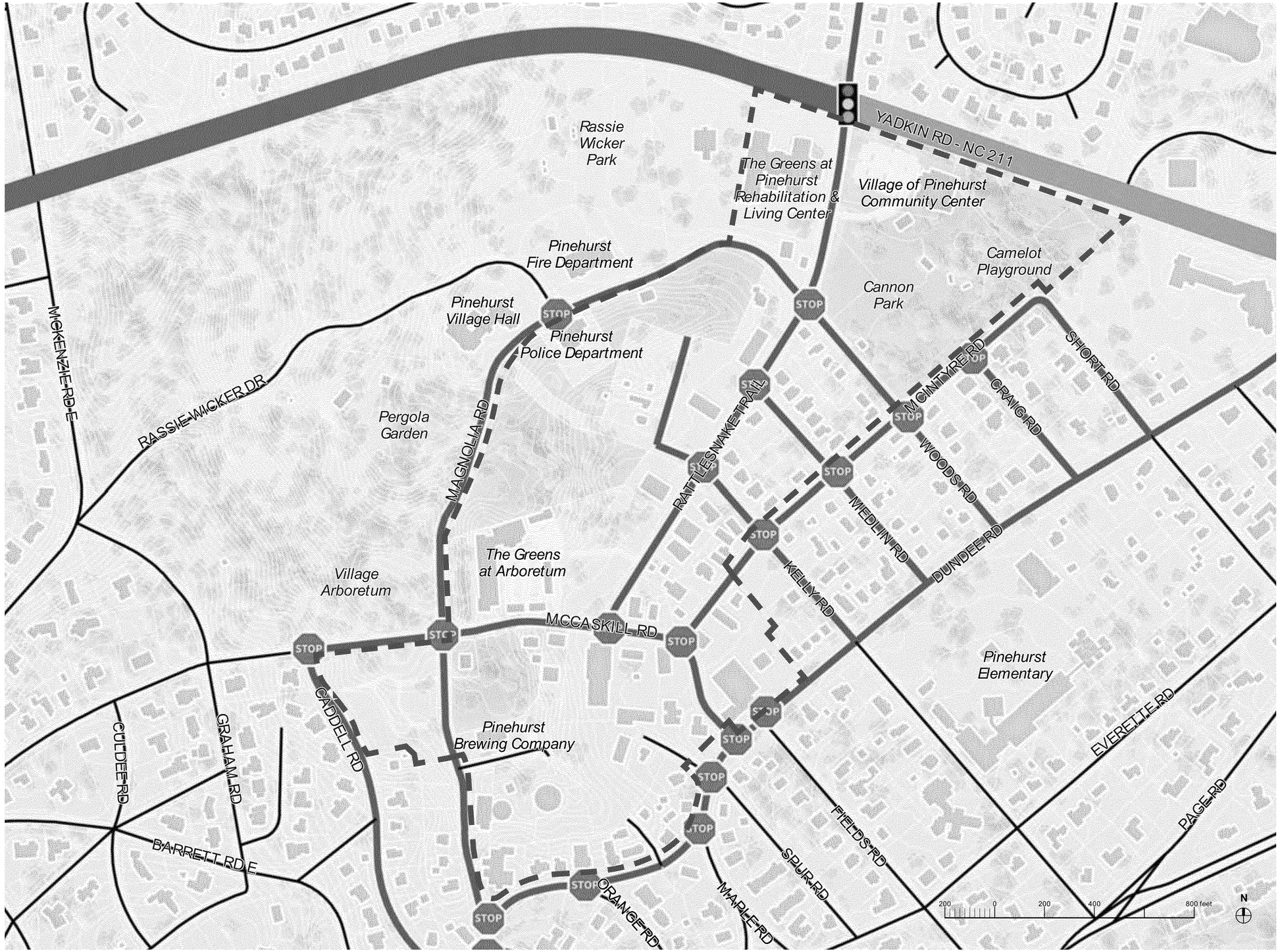
Existing Conditions

Posted Speed and Traffic Control

All of the streets within the study area boundary have posted speeds of 25 mph. Stop signs are located at most intersections with a traffic signal placed at Rattlesnake Trail and Yadkin Road - NC 211 for added control and safety.

KEY

- SMALL AREA PLAN (SAP) BOUNDARY
- VILLAGE OF PINEHURST
- STOP CONTROL
- TRAFFIC SIGNAL
- NO DATA AVAILABLE
- 25 MPH
- 35 MPH
- 45 MPH
- 55 MPH



Existing Conditions

Zoning

The north half of the study area is primarily zoned a mix of Residential (R10) where single-family detached residential housing exists, surrounded by Public Conservation (PC) where parks and open space are located. The south half of the study area, closer to the Village Center, is zoned a mix of Neighborhood Commercial (NC) and Village uses, including Village Mixed-Use (VMU), Village Cottage Professional (VCP), and Village Residential (VR).



KEY

- SMALL AREA PLAN (SAP) BOUNDARY
- VILLAGE OF PINEHURST
- R8 - RESIDENTIAL
- R10 - RESIDENTIAL
- R20 - RESIDENTIAL
- R30 - RESIDENTIAL
- RMF - RESIDENTIAL MULTIFAMILY
- VR - VILLAGE RESIDENTIAL
- HD - HOSPITAL DEVELOPMENT
- NC - NEIGHBORHOOD COMMERCIAL
- OP - OFFICE & PROFESSIONAL
- PC - PUBLIC CONSERVATION
- RD - RECREATIONAL DEVELOPMENT
- VC - VILLAGE COMMERCIAL
- VCP - VILLAGE COTTAGE PROFESSIONAL
- VMU - VILLAGE MIXED USE

Existing Conditions

Land Use

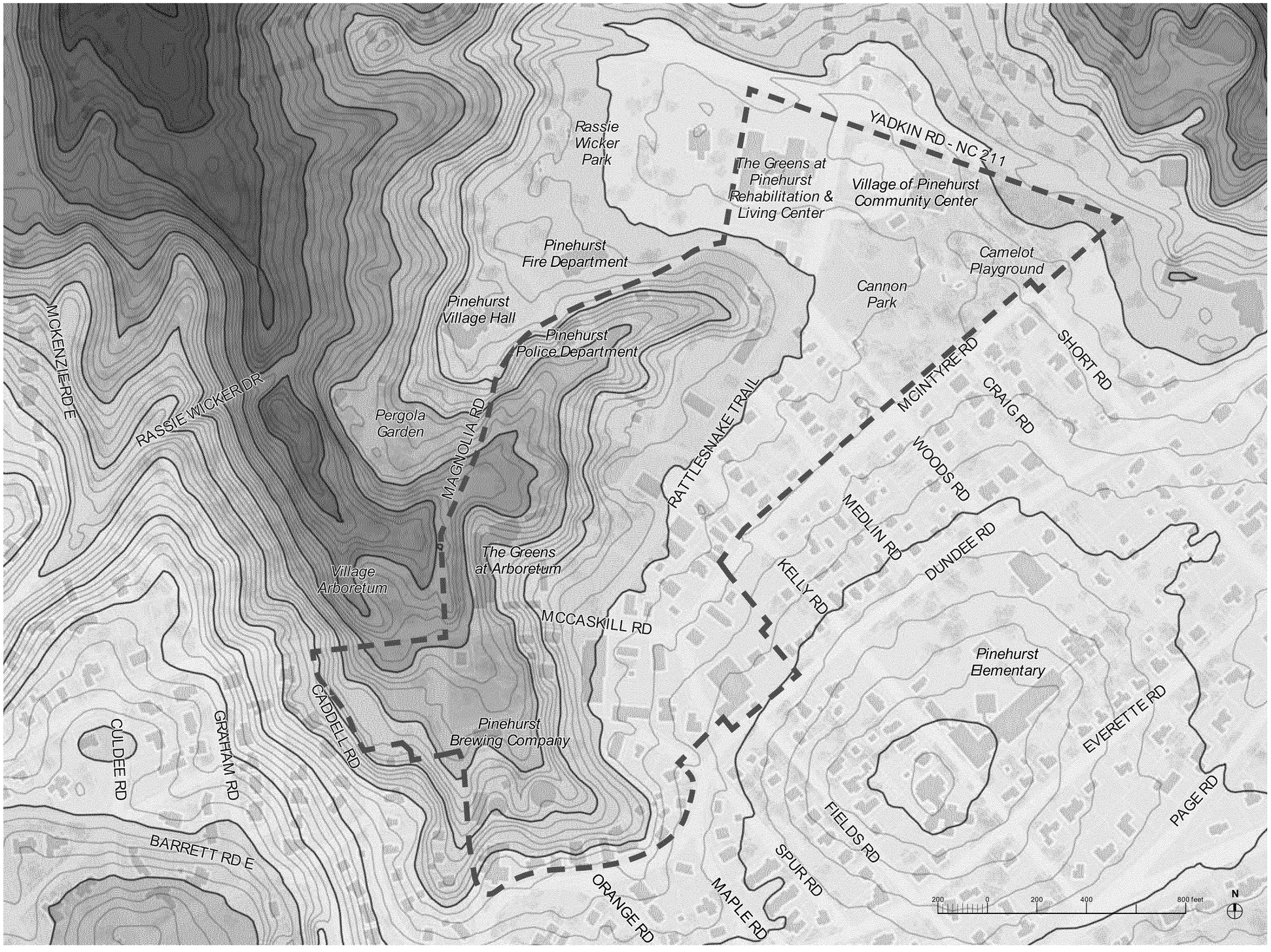
The study area includes a wide range of land uses that are mixed throughout its boundary. A majority of the residential uses and parks and open spaces exist within the northern half of the study area. More retail, civic, and industrial uses are located in the southern half, closer to the Village Center. Vacant parcels are interspersed throughout the study area.



Existing Conditions

Topography

The topography of the study area is characterized by a natural ridge line that extends along Rattlesnake Trail, from the study area's southern boundary to the northern boundary at Cannon Park. The grade slopes downward west of Rattlesnake Trail and upward to the east of Rattlesnake Trail and to the south.



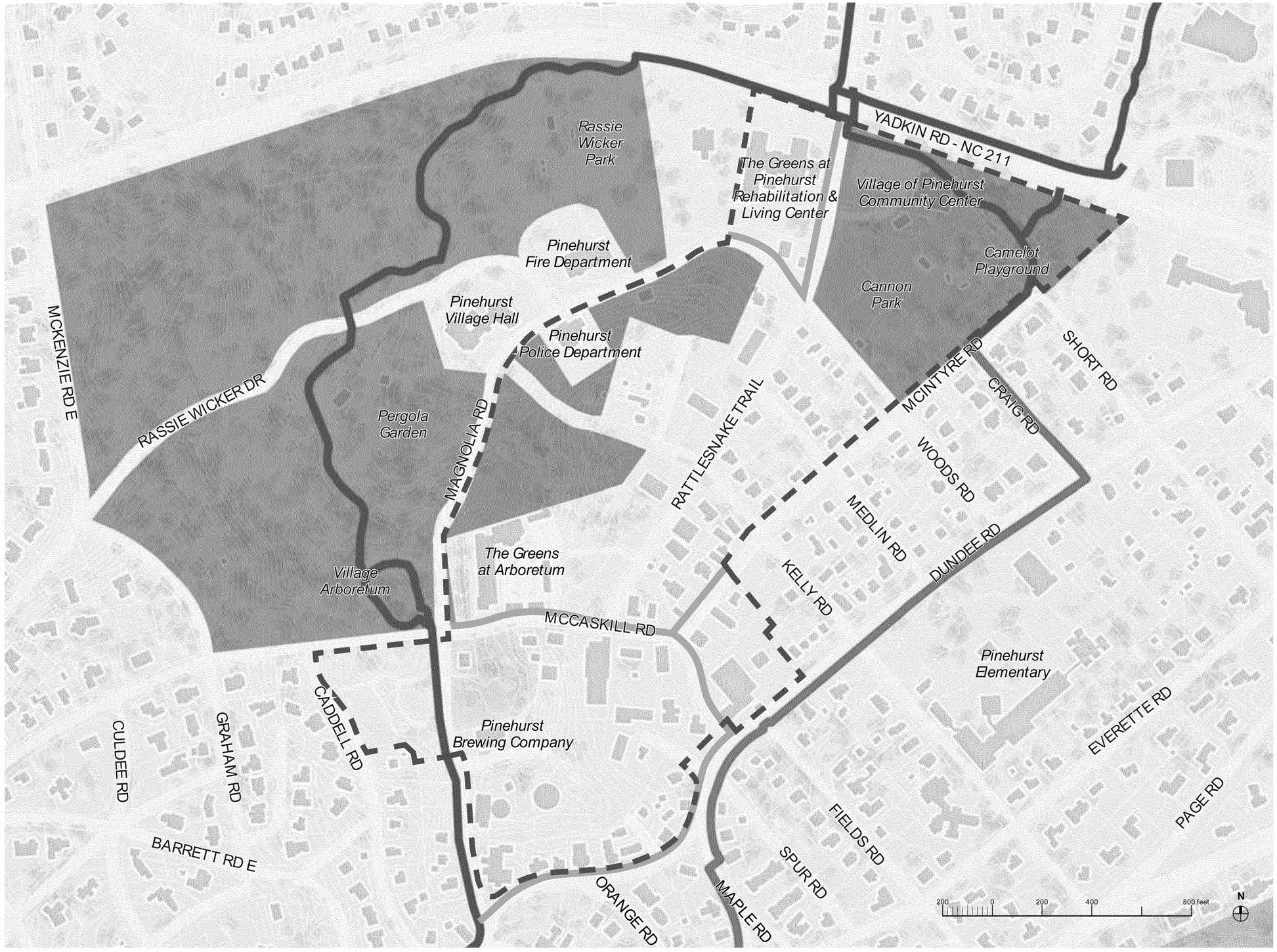
Existing Conditions

Open Space + Trails + Sidewalks

The study area is well served with open space consisting of a series of active and passive parks and gardens. Cannon Park, located to the north, is a 15-acre park with recreation fields and play space. Along Magnolia Road are a series of open spaces that cover the steep slopes west of Rattlesnake Trail and are an extension of Rassie Wicker Park. The community park is a 103-acre facility that includes a variety of recreational courts, splash pad, playground, a 33-acre arboretum, and several manicured lawns and gardens to host a wide range of events. Throughout the study area is a network of trails, including greenway trails, walkway trails, and sidewalks.

KEY

- SMALL AREA PLAN (SAP) BOUNDARY
- VILLAGE OF PINEHURST
- GREENWAY TRAILS
- WALKWAY TRAILS
- SIDEWALKS
- PARKS/ OPEN SPACE



Existing Conditions

Site Aerial

The aerial image shows the Pinehurst South Small Area Plan (SAP) boundary as a brown dashed line.

KEY

- SMALL AREA PLAN (SAP) BOUNDARY
- VILLAGE OF PINEHURST

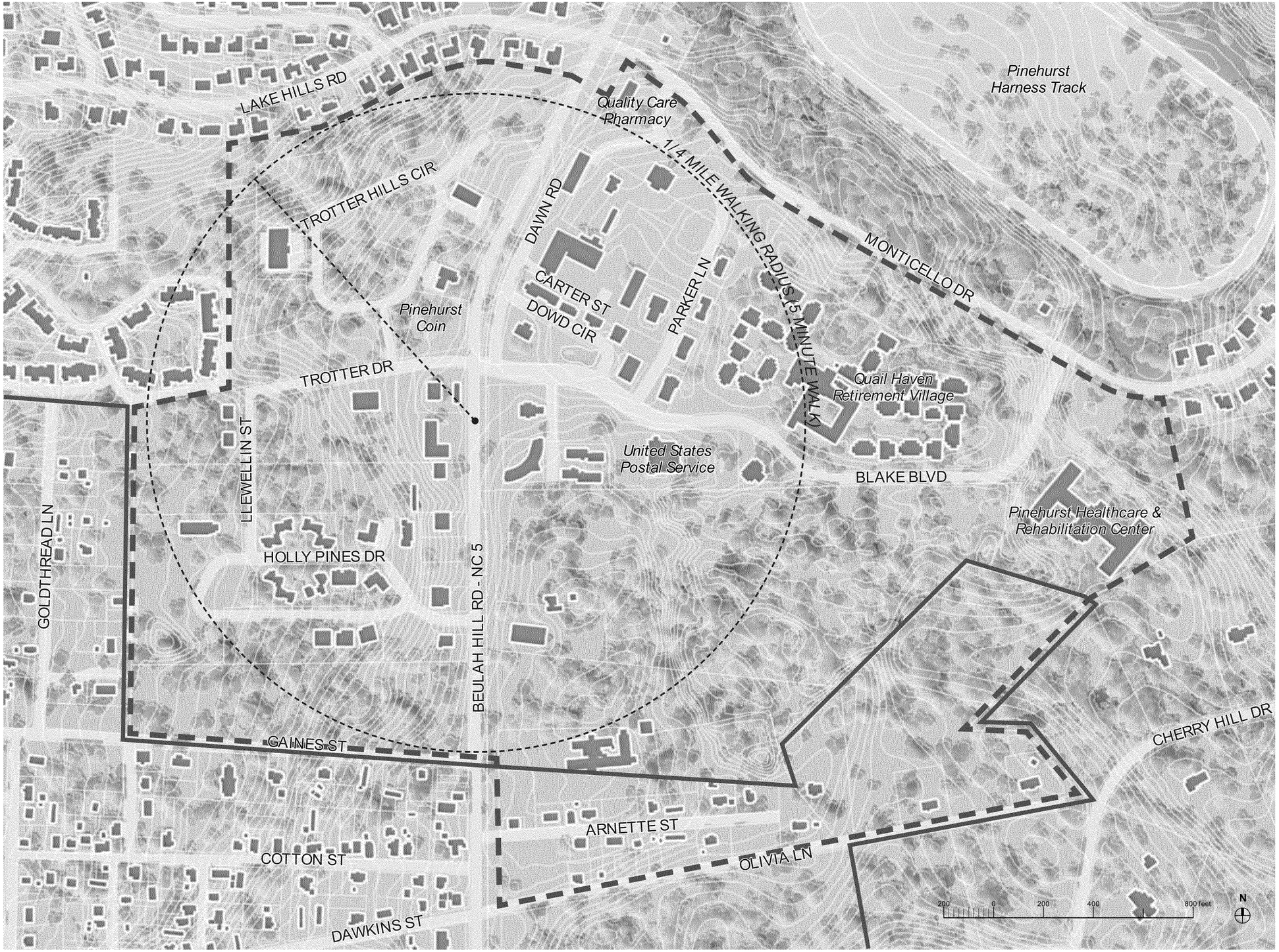


Illustrative Site Plan

The Existing Illustrative Plan depicts the development and open space patterns that exist in the study area. A 1/4-mile walking radius (5-minute walk) is indicated on the plan for reference.

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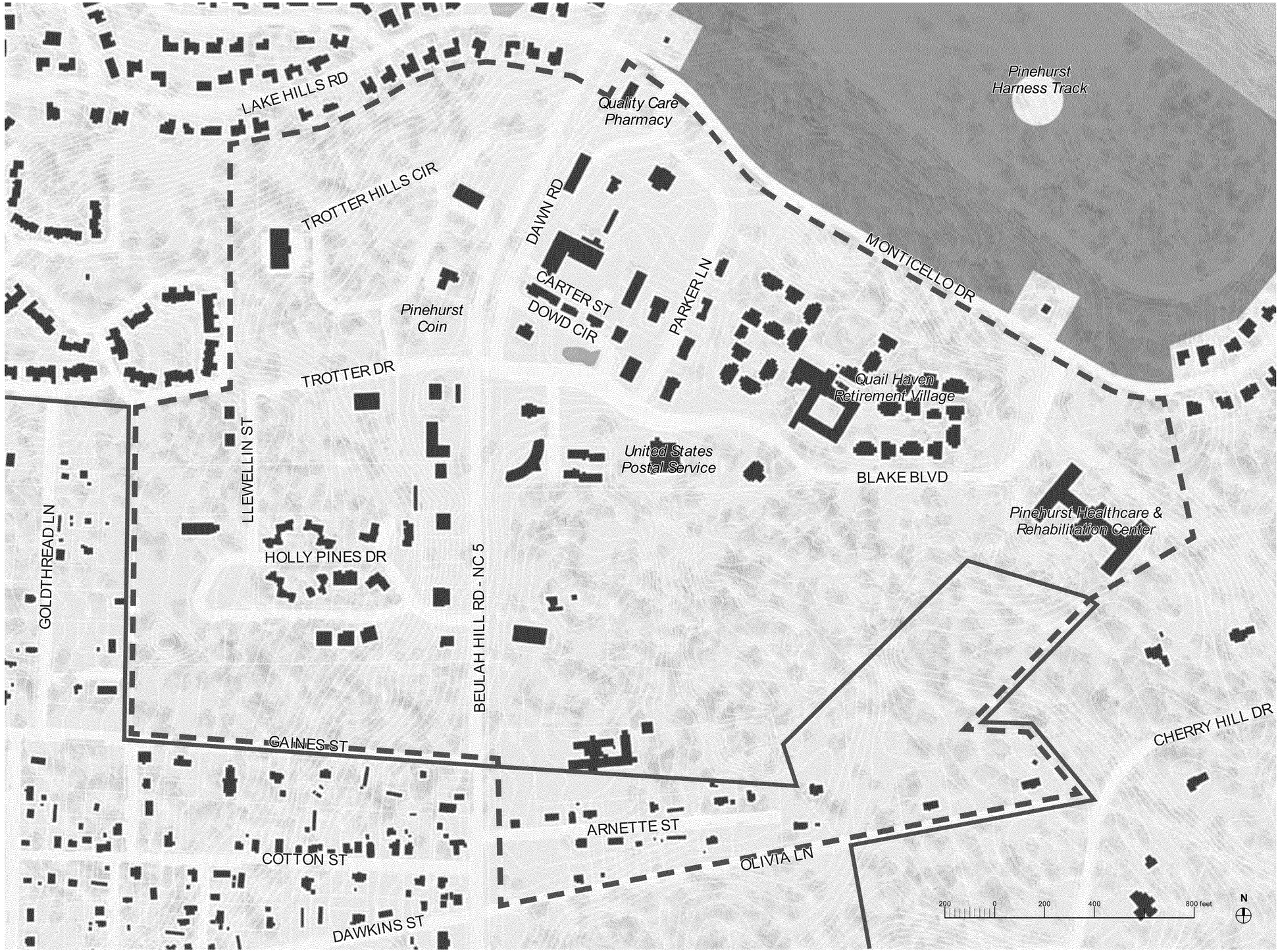
- SMALL AREA PLAN (SAP) BOUNDARY
- VILLAGE OF PINEHURST
- BUILDING FOOTPRINTS
- PARKS/ OPEN SPACE



Existing Conditions

Figure Ground

The development patterns in the study area are characterized by commercial uses accessed off of Beulah Hill Road - NC 5 with a mix of residential building types interspersed to the west and east. Undeveloped parcels exist in Trotter Hills, a planned office development located in the northwest corner of the study area. The development consists of 17 parcels with approximately 1/3 of the lots either developed, permitted, or under review. Larger underutilized land exists in the southeast corner of the study area.



KEY

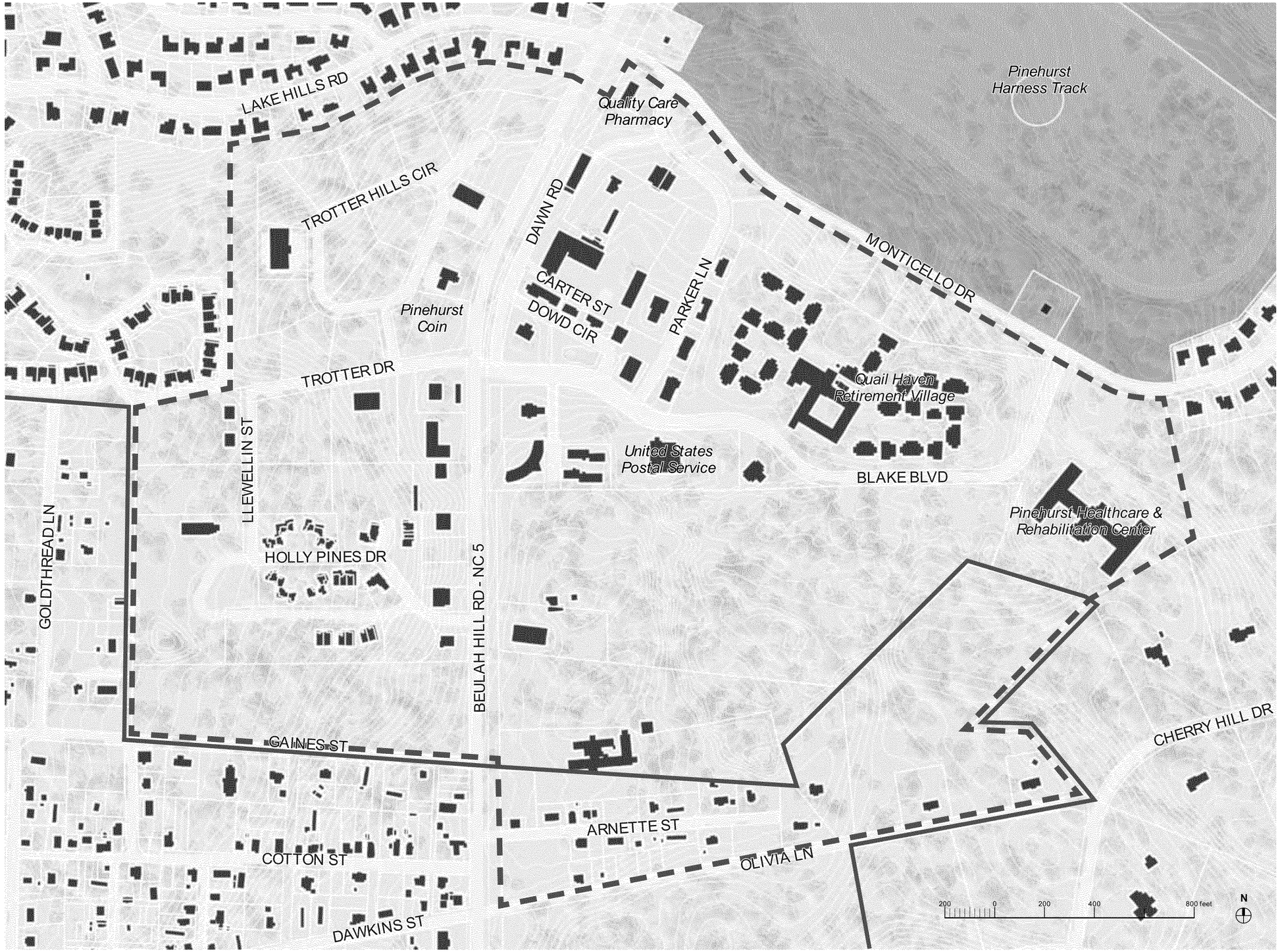
- SMALL AREA PLAN (SAP) BOUNDARY
- VILLAGE OF PINEHURST
- BUILDING FOOTPRINTS

Historic District

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KEY

- SMALL AREA PLAN (SAP) BOUNDARY
- VILLAGE OF PINEHURST
- BUILDING FOOTPRINTS
- HISTORIC DISTRICT OVERLAY

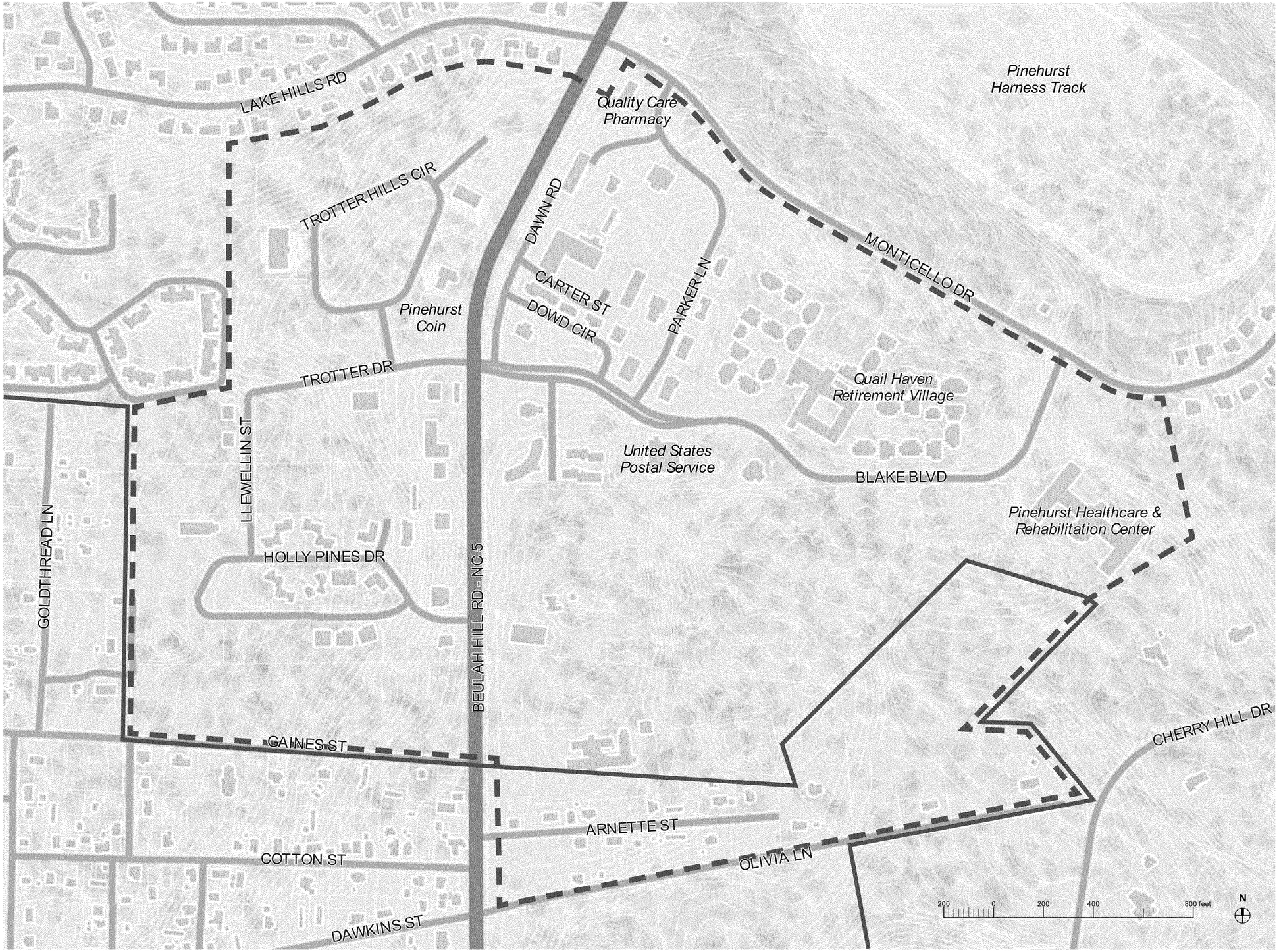


Street Network

The Pinehurst South study area spans Beulah Hill Road - NC 5, a major connector street that provides direct access to the Village Center to the north and US 501 to the south. Neighborhood streets are organic and disconnected with some dead-end conditions throughout the study area.

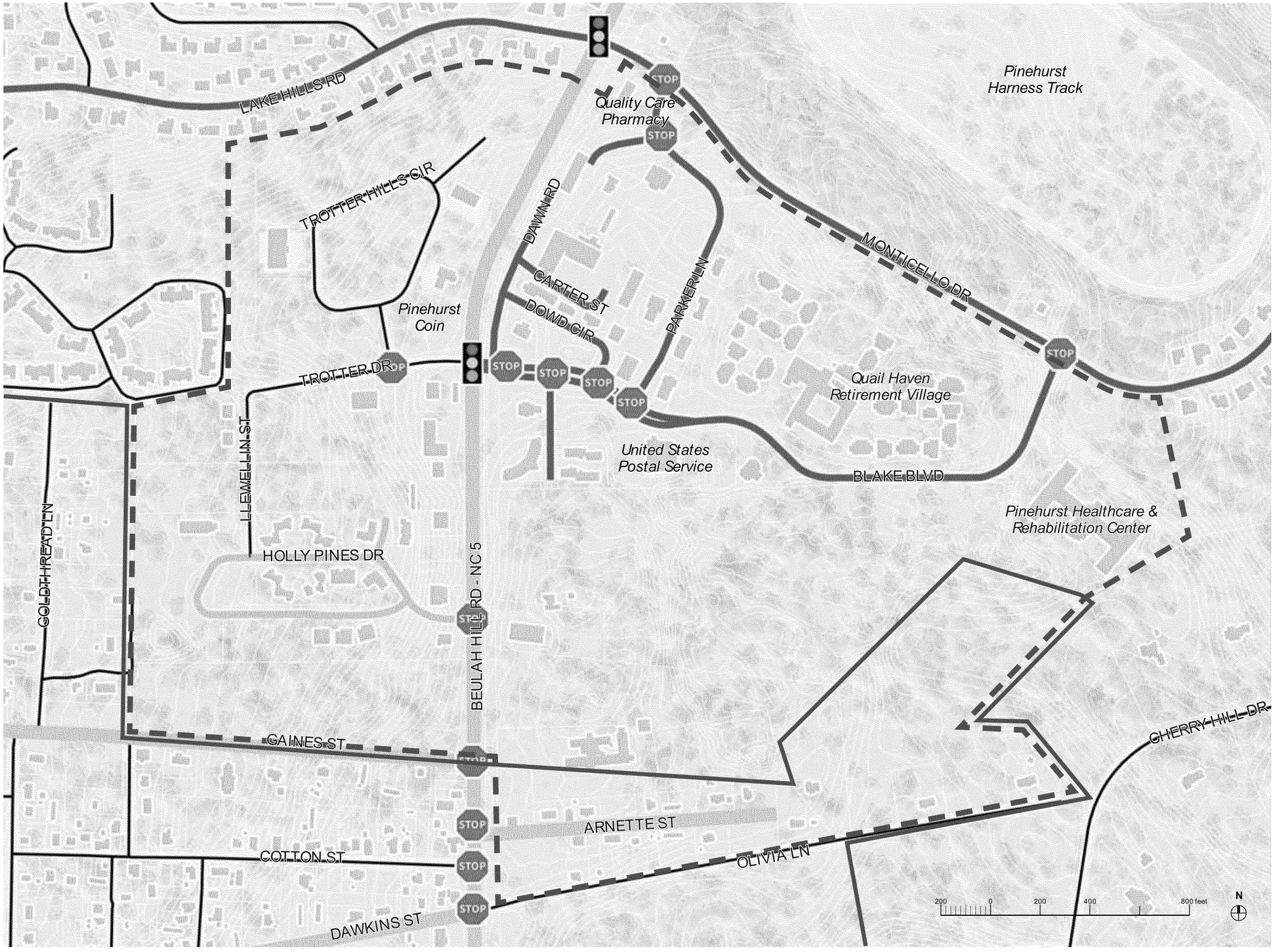
KEY

- SMALL AREA PLAN (SAP) BOUNDARY
- VILLAGE OF PINEHURST
- HIGHWAYS
- MAJOR CONNECTOR STREETS
- NEIGHBORHOOD STREETS



Posted Speed and Traffic Control

The streets within the study area boundary have a range of posted speeds. Beulah Hill Road - NC 5 is 35 mph. A majority of the neighborhood streets are 25 mph with the exception of Holly Pines Drive which is 10 mph. Stop signs are located at all Beulah Hill Road - NC 5, Blake Boulevard, and Monticello Drive intersections. For added control and safety, traffic signals have been placed along Beulah Hill Road - NC 5 at the intersections of Blake Blvd and Monticello Drive.



KEY

- SMALL AREA PLAN (SAP) BOUNDARY
- VILLAGE OF PINEHURST
- STOP CONTROL
- TRAFFIC SIGNAL
- NO DATA AVAILABLE
- 10 MPH
- 25 MPH
- 35 MPH
- 45 MPH
- 55 MPH

Zoning

A majority of the eastern half of the study area is zoned Neighborhood Commercial (NC) with a mix of Office and Professional (OP) and Residential (R5) zones. The western half of the study area is Office and Professional (OP) to the north with Residential Multifamily (RMF) to the south.



KEY

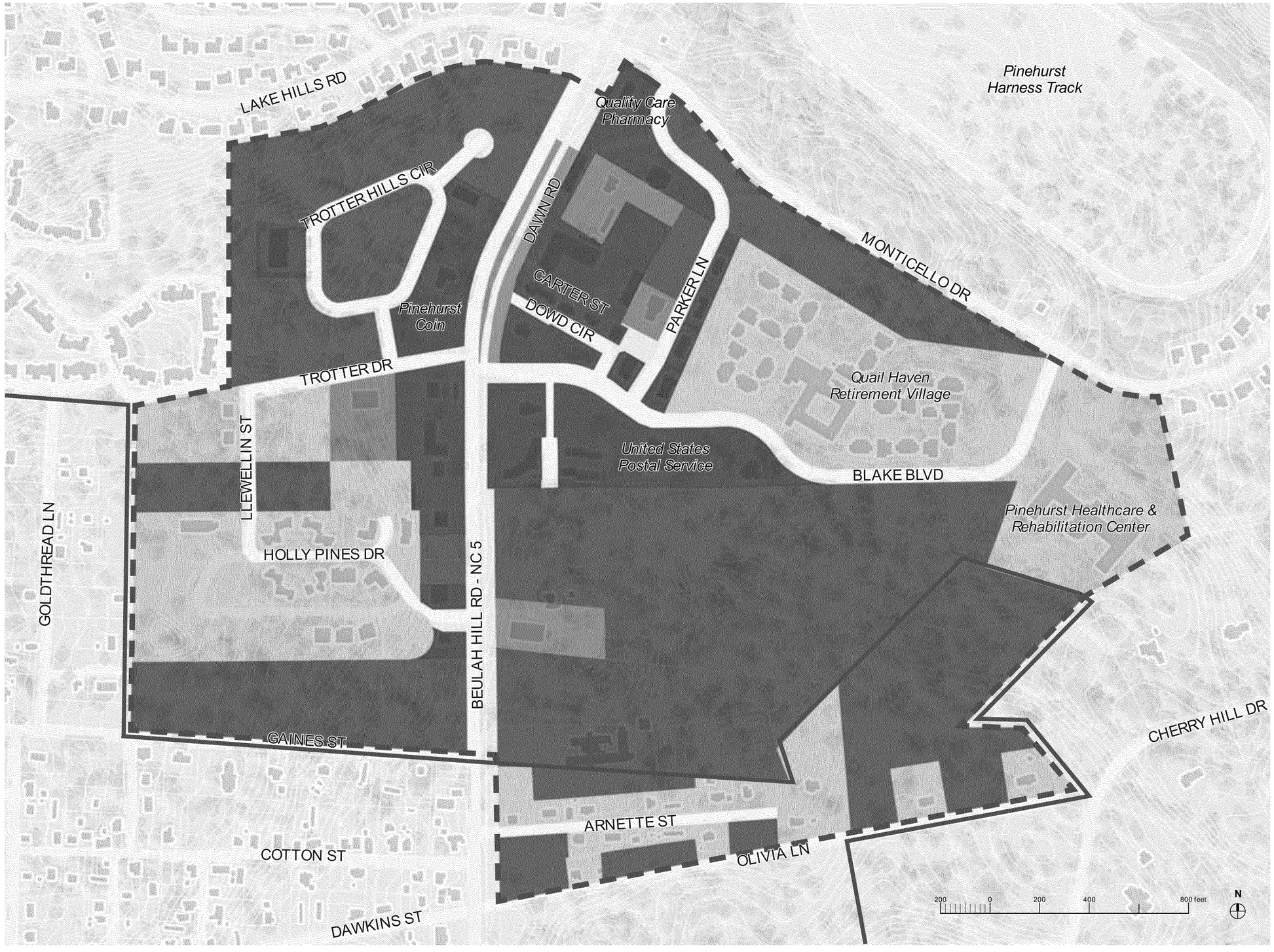
- SMALL AREA PLAN (SAP) BOUNDARY
- VILLAGE OF PINEHURST
- R5 - RESIDENTIAL
- R10 - RESIDENTIAL
- R30 - RESIDENTIAL
- RMF - RESIDENTIAL MULTIFAMILY
- NC - NEIGHBORHOOD COMMERCIAL
- OP - OFFICE & PROFESSIONAL
- PC - PUBLIC CONSERVATION
- RD - RECREATIONAL DEVELOPMENT

Land Use

The study area includes a mix of land uses. A majority of the commercial uses are centered along Beulah Hill Road - NC 5 with residential uses and large vacant properties surrounding the commercial core. A large percentage of the study area is vacant or underutilized.

KEY

- SMALL AREA PLAN (SAP) BOUNDARY
- VILLAGE OF PINEHURST
- CIVIC
- RETAIL
- OFFICE
- RESIDENTIAL
- INDUSTRIAL
- VACANT
- PARKS/ OPEN SPACE



Topography

The topography of the study area is characterized by a natural ridge line along Beulah Hill Road - NC 5. The study area sits at a plateau along the eastern side with grades sloping downward towards Pinehurst Lake.



KEY

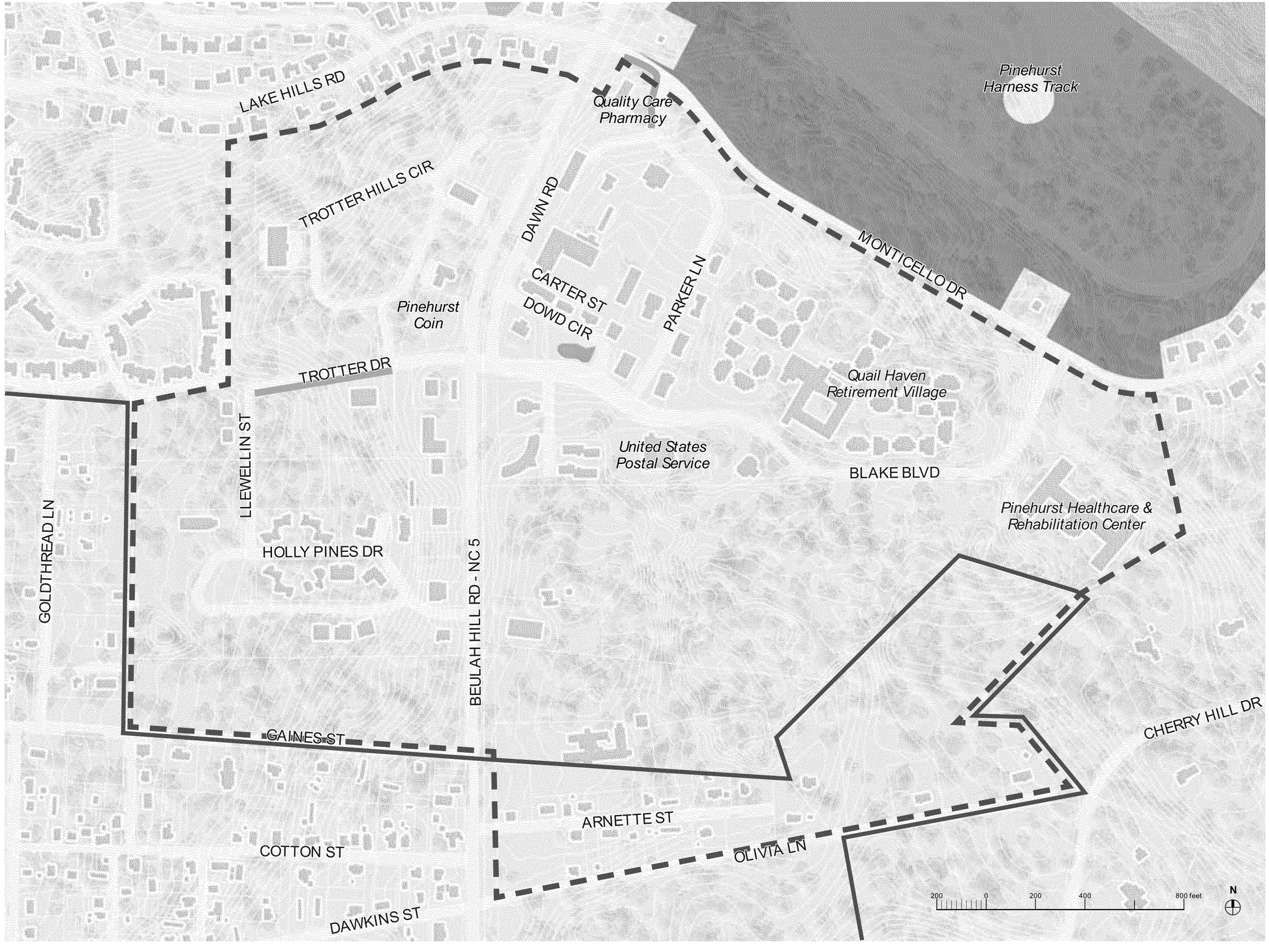
- SMALL AREA PLAN (SAP) BOUNDARY
- VILLAGE OF PINEHURST
- +550
- +450

Open Space + Trails + Sidewalks

The study area contains no dedicated public open space or trails within its boundary. There are only two segments of sidewalks that currently exist on parker Lane and a portion of Trotter Drive. Just north of the study area is the Pinehurst Harness Track, one of the oldest continuously operating equine sports facilities in the state.

KEY

- SMALL AREA PLAN (SAP) BOUNDARY
- VILLAGE OF PINEHURST
- GREENWAY TRAILS
- WALKWAY TRAILS
- SIDEWALKS
- PARKS/ OPEN SPACE





VILLAGE OF PINEHURST
SMALL AREA PLAN
MARKET ANALYSIS

APRIL 2, 2021| VERSION FINAL

Design Collective

DUGGAL REAL ESTATE ADVISORS

RKA RAMEY KEMP ASSOCIATES

VILLAGE OF PINEHURST

MARKET STUDY

INTRODUCTION

Background and Objectives

Duggal Real Estate Advisors, LLC is part of an interdisciplinary team led by Design Collective hired to complete Small Area Plans for two areas in the Village of Pinehurst. The Village of Pinehurst is located in Moore County, North Carolina southwest of Raleigh-Durham, east of Charlotte, and west of Fayetteville.

The market analysis is one step in the process to determine the feasibility of land uses within the Village of Pinehurst and the study areas. It ascertains the quantitative and qualitative aspects of demand for land uses that might be appropriate for future development in the study areas and quantifies the potential scale and timing of these uses.

The study areas include:

Village Place/Rattlesnake Trail: Approximately 100 acres in size and represented by 70 different parcels, this area is immediately north of the historic center of the community and stretches out to NC 211.

Pinehurst South: Also known as the Highway 5 Commercial Area, Pinehurst South is an approximate 290 acre limited growth and redevelopment area on the Village's south side containing approximately 145 parcels.

Methodology

In order to assess the future opportunity in the Village and study areas, Duggal Real Estate Advisors completed the following tasks:

Site Analysis: Duggal Real Estate Advisors completed a review of the Village Place and Pinehurst South planning areas from a market perspective. We visited the subject areas and assessed them in terms of strengths, weaknesses, opportunities, and threats (SWOT) relative to location, site characteristics, surrounding land uses, access, planned redevelopment potential, and others.

Economic and Demographic Analysis: We analyzed local and regional demographic and economic data to understand the potential for each of the land uses in the study areas. The goal was to assess the growth potential of the overall market area that will drive demand for future land uses in the planning areas.

Competitive Supply Analysis: We completed an overview of the market for for-sale and for-rent residential, office, retail, hotel, and golf in order to make reasonable assumptions about the market. The competitive supply analysis is completed in order to understand how competitive and comparable properties and projects are performing in order to help understand the market potential in the subject areas.

Demand Analysis: We determined the likely demand for for-sale and for-rent residential, office, retail, hotel, and golf land uses. This portion of the market study is forward looking, and determines the demand for the subject areas based upon projected future growth in the area. The output of the demand analysis is a range of likely capture of the overall market demand that leads to absorption in the subject areas.

Stakeholder Interviews: Duggal Advisors participated in interviews with knowledgeable real estate and economic development professionals to understand the opportunity for various land uses in the market.

Innovation Hub Analysis: Envision the Village called for an Innovation Hub at Pinehurst South. At a high level, we analyzed the potential for an Innovation Hub for the Pinehurst Small Area Plan. We utilized information from the Brookings Institute and others to compare the "necessary ingredients" for an Innovation Hub relative to the Pinehurst area.

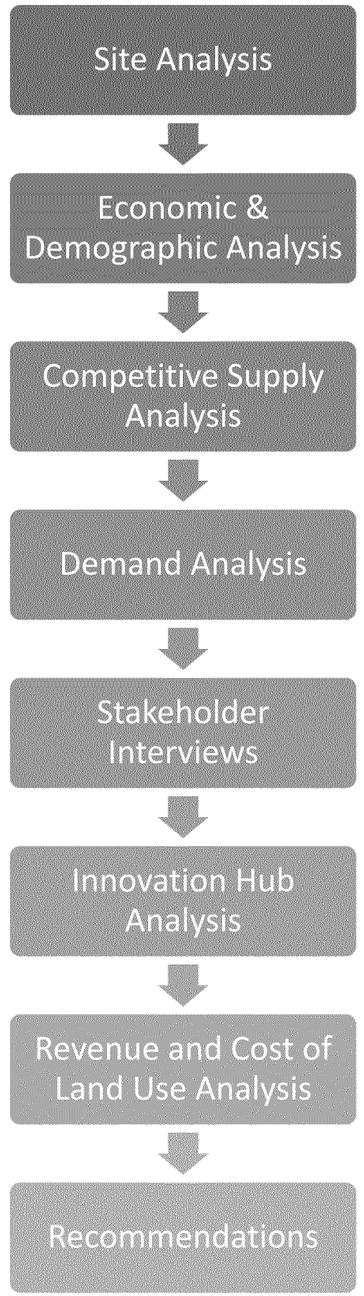
Revenue and Costs of Land Uses Analysis: A future step in the process is to determine the revenue and the costs of added service and infrastructure on the potential plans and market opportunities. We plan to use the FY 2017 Land Use Fiscal Analysis completed by the Village of Pinehurst.

Recommendations: We provided recommend-dations on the feasibility of land uses within the study areas. We provided a development strategy that takes into account a range of possible market scenarios. A future step is to help the Planning Team craft realistic plans for the planning areas.

We utilized projections and information supplied by others and gathered by ourselves. We assume this information is complete, correct, and reliable. Any projections regarding the future are the best estimate from the date they were prepared. Projections, by their nature, are best estimates of the future, and inevitably will be inaccurate to some degree.

We assume the economy and real estate markets will continue to grow as projected. Real estate markets are cyclical, so there are bound to be times within the planning timeframe that the market performs better (boom) or worse (downturn) than projected. Over the course of the study period, we assume the average annual growth projected will materialize.

This report was prepared by Melina Duggal, AICP of Duggal Real Estate Advisors, LLC. The data was collected in November and December 2020 and January 2021.



Duggal Real Estate Advisors completed a site analysis for the Village Place area based upon market issues. These strengths, weaknesses, opportunities, and threats (SWOT) are shown in the figure below.

Overall, Village Place offers a strong opportunity to develop a variety of land uses. Drawing upon the Village Center as inspiration, Village Place can complement what is already part of the community.

Strengths

- Location close to Village Center provides a strong foundation
- Community Center, Cannon Park, Rassie Wicker Park & Village Arboretum
- Walkable to Village Center
- Large number of amenities
- Strong brand of Pinehurst
- Some redevelopment already occurring (Pinehurst Brewery)

Weaknesses

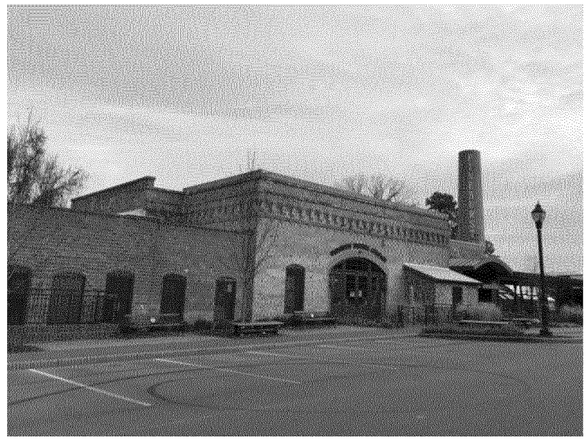
- Some of the properties are older
- Parking challenges
- Limited amount of available land

Opportunities

- Build off the success of historic Village Center
- Growth in nearby neighborhoods
- Redevelopment of Public Services and Moore County Utilities water tank sites
- Redevelopment of older properties
- Close to NC 211 – enhance character and attractiveness of intersection area

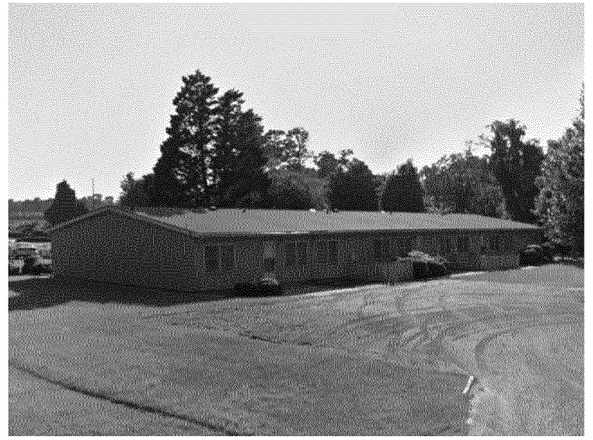
Threats/Challenges

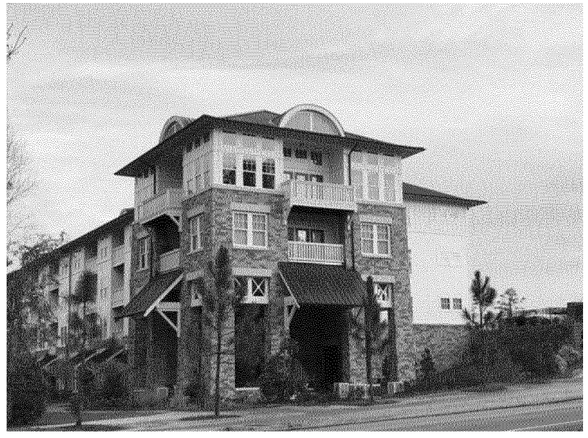
- Inability to create a strong direct link between Village Core and Village Place
- Challenge of moving the Moore County Utilities water tanks and Public Services
- Small developed parcels and multiple property owners could make site acquisition & redevelopment challenging


Pinehurst Brewing Company


Old Fire House


Community Center


The Village Quarters


The Greens at Arboretum


Single-family detached home

Duggal Real Estate Advisors completed a site analysis for the Pinehurst South area based upon market issues. These strengths, weaknesses, opportunities, and threats (SWOT) are shown in the figure below.

Overall, Pinehurst South is best suited for residential and office uses. Hospitality could be an option as well. Large-scale retail would be challenging given the access issues, but locally-serving retail would be viable.

Strengths

- Land availability
- Natural character and trees
- Direct access to Pinehurst Resort via NC 5
- New development in area including the new post office
- Strong businesses in area (such as Quail Haven Retirement Village)

Weaknesses

- No common theme to buildings
- Unrelated land uses
- Traffic issues
- Lack of cohesion/consistent character within area

Opportunities

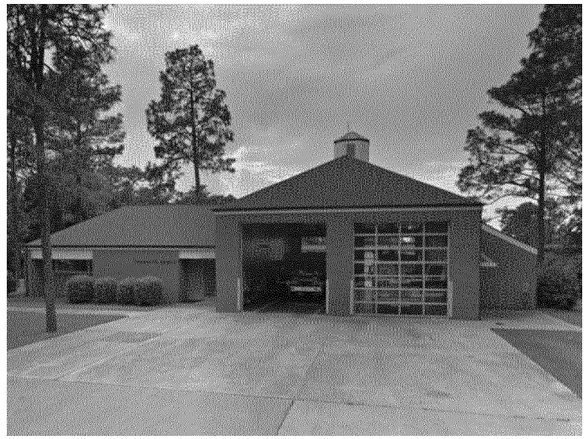
- Capitalize on growth along NC 5
- Concentration of public and semi-public services (post office, fire station, VA services)
- Create a distinct identity for area
- Build off of USGA
- Infill development

Threats/Challenges

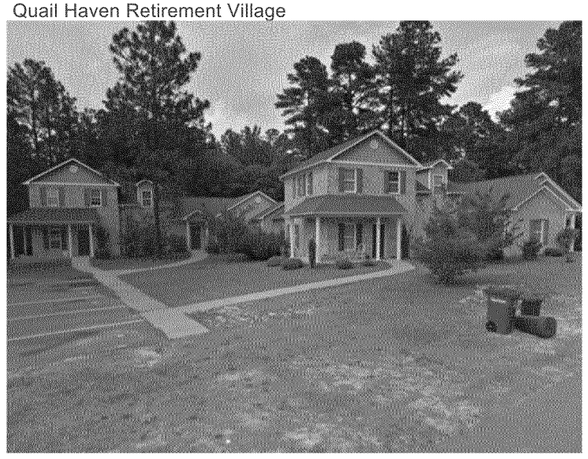
- RR crossings & limited access
- Significant amount of vacant land south of the study area along NC Hwy 5 that could take demand potential away



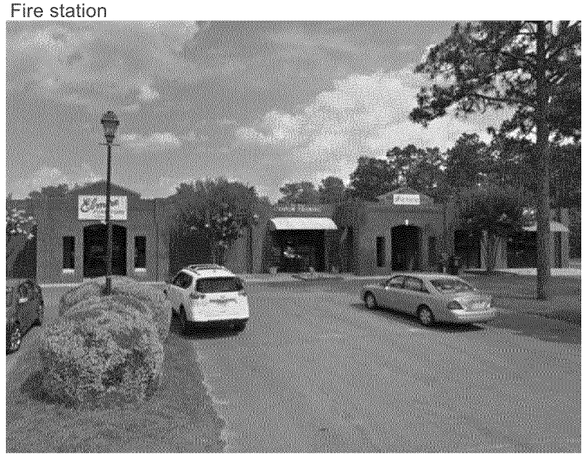
Quail Haven Retirement Village



Fire station



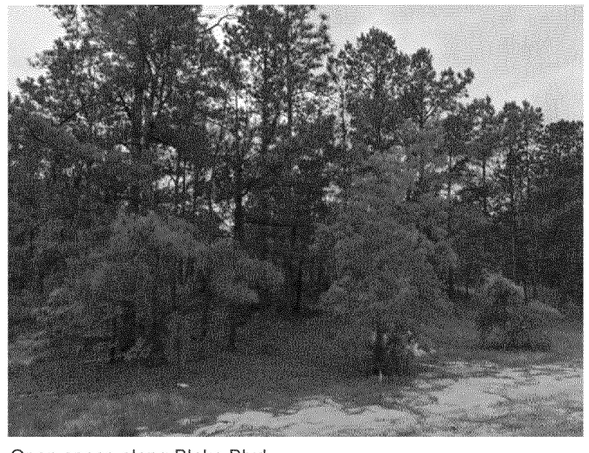
Abingdon Square Townhomes



Retail



Veterans Guardian Claim Consulting



Open space along Blake Blvd.

MARKET ANALYSIS

RECOMMENDATIONS

Summary of Market Opportunity

For the market analysis, we examined six different land uses: for-sale residential, for-rent residential, retail, office, hospitality, and golf. The following is a summary of the opportunity for each of the land uses in the Village of Pinehurst and the planning areas.

The overall market opportunity takes into account the current and projected future market conditions, future demand potential, and the suitability for the land use within the Village.

Land Use	Overall Market Opportunity	Village Place	Pinehurst South
For-Sale Residential	XXXXX	XXXX	XXXX
For-Rent Residential	XXX	XXX	XXX
Retail	XXXX	XXX	XXX
Office	XX	XX	XX
Hospitality	XXX	XXX	XXX
Golf	XX	O	X

Key: XXXXX = best, X = worst, O = none

Summary of Demand

For each of the land uses, we completed a demand model to understand the future potential of the land use within the Village or Moore County, depending on the land use.

To determine how much of each land use would likely locate within the planning areas, it was necessary to consider where else within the Village the land use could be located. For example, if there is demand for one rental project every three to eight years within the Village, it can't be located in both planning areas, but in reality, it could be located in either one or another location in the Village, making it difficult to assign demand.

For many land uses, there has been and will be more demand for the product type within the Village than the amount of supply that has been or will be available (e.g. more houses would likely sell if they were available).

Land Use	Demand Potential	Locations within Pinehurst
For-Sale Residential	80-130 homes/year	Almost anywhere
For-Rent Residential	15-25 units/year	Major roads, VP, PS, Village Cntr
Retail	20-25,000 SF/ every 5 years	Major roads, VP, PS, Village Cntr
Office	Up to 5,000 SF/year	Medical area, VP, PS, Village Cntr
Hospitality	25 rooms/yr. in Moore Co.	Resort, Village Cntr, PS, VP
Golf	2-3 courses over the next 10 years in Moore Co.	Focus Area 1 is the only area with space

Summary of Demand for Land Uses within Planning Areas

We then considered how much of the demand could be located within the planning areas if the area was zoned for it, landowners were interested in selling, and developers would build it. While the market analysis quantifies realistic development opportunities, actual land use allocation will be guided by planning exercises, vision and community and stakeholder input in balance with market demand.

The potential for most of the land uses is present in both planning areas.

Although there is some flexibility in these numbers as stated before, we have put together guidelines based upon the market to help the planning team understand the magnitude of demand in each of the planning areas.

Land Use	Village Place	Pinehurst South
For-Sale Residential	Unlimited at build-out* 1 project would sell approximately 15-25 homes per year	Unlimited at build-out* 1 project would sell approximately 15-25 homes per year
For-Rent Residential	At build-out*, 1-2 projects of 70-100 units each Timing depends on where else apartments have been constructed (e.g. Village only has demand for 1 project every 3 -8 years)	At build-out*, 1-2 projects of up to 200 units each, depending on location Timing depends on where else apartments have been constructed (e.g. Village only has demand for 1 project every 3-8 years)
Retail	25,000-50,000 SF at build-out*	Up to 80,000 SF with grocery, 40,000 SF without grocery at build-out*
Office	25,000 – 30,000 SF at build-out* Limited amount per year. 5,000 SF total in Village. Village Place could capture some of that, but likely less than Pinehurst South	Up to 100,000 SF at build-out* Limited amount per year. 5,000 SF total in Village. Pinehurst South could capture some of that. Could increase, depending on impact of USGA
Hospitality	At build-out*, 1 hotel with 75-100 rooms as well as bed and breakfasts	At build-out*, 1 hotel with approximately 100 rooms
Golf	None	Possibly some support functions (although the land probably has a higher and better use than maintenance for golf)

** Build-out refers to when land availably within the study areas is gone. Given the large areas and nature of (re)development, we cannot determine when the areas will be "finished". The build-out provides the planning team and public an idea of what would likely be the maximum possible for each land use taking into account product demand, land availability, suitability of land use, planning, vision, etc.*

Land Use	Summary of Market Conditions	Future Demand Potential	Product/Tenant Types	Preferred Location	Suitability for Village Place	Suitability for Pinehurst South
For-Sale Residential	• Building permits have been rising in Pinehurst, suggesting an uptick in the new for-sale housing market • The resale market has remained relatively steady • Many new homes are scattered throughout existing golf course communities • New homes within non-golf smaller subdivisions tend to be less expensive and generally range from $250,000 to $400,000 • New homes within golf master-planned communities tend to be more expensive and range from $300,000 to over $1 million	• Strong demand potential from local buyers, military buyers, and second home buyers • There is demand for approximately 80-130 new homes per year in the Village (which may or may not be realized). Some years will have more and some will have less, but are likely to average 100 new homes per year	• Approximately 12% of owner-occupied homes in Pinehurst have children in them • The majority of owners in Pinehurst (almost 70%) are married couples without children, and of these, 65% are over the age of 65 • Buyers are reported to be a mix of military families from Fort Bragg, children of current owners, commuters, and retired and second home owners	• Owners like to be near services and amenities. Walkable locations are desired. Golf course communities are popular • Depending on the age and make-up of owners, schools can be an important factor as well	**Strong** Small lot SFD Attached product Mixed-use **Medium** Multifamily	**Strong** Small lot SFD Attached product **Medium** Mixed-use Multifamily
For-Rent Residential	• The majority of rental product in Pinehurst is single-family detached • Rents have been steadily rising in Pinehurst • Apartment complexes are 95% occupied on average • The majority of renters pay between $1,000 to $2,000 in rent	• The majority of households in Pinehurst own their homes (85%), so demand for rental product is lower • There is demand for approximately 15-25 new units of rental housing per year in the Village	• Approximately 27% rental units in Pinehurst have children in them • Rental apartments would likely appeal to a younger demographic without children. They are typically 1 and 2 person households • Rental townhomes would likely appeal to family renters	• Renters like to be near services and amenities. Walkable locations are desired. • Depending on the age and make-up of renters, schools can be important as well as nightlife	**Strong**	**Strong**
Retail	• Overall a strong retail market with low vacancy rates • Currently some challenges due to Covid-19 • This is likely a short-term issue • Almost half of the retail in the Village is restaurants. This includes a variety of sit down and fast casual establishments	• Strong demand potential tied to future household growth • Much of the retail is outside of the Village limits. There is even leakage outside of Moore County for certain categories • There is demand for 20-25,000 square feet of retail every five years in the Village – often this is captured by surrounding communities	• Retail most in demand includes auto parts and accessory stores, furniture stores, building material stores, health & personal care stores, gas stations, clothing stores, sporting good stores and restaurants	• Retailers want centralized, visible, accessible and appropriate locations • Local retail (Neighborhood Goods & Services and Food & Beverages): near households • Regional retail (General Merchandise, Apparel, Furnishings & Other): along US 15-501, NC 211, and US 1	**Strong** Small, locally-serving Boutique Restaurant **Medium** Convenience	**W of Hwy 5** Future neighborhood-serving (drugstore, grocery possible) Restaurant **E of Hwy 5** Limited to serving residents and workers (restaurant, café)
Office	• The market is currently doing fairly well. It is reported to be well-occupied, and lease rates are stable	• There is limited demand for future office space at up to 5,000 square feet per year	• Medical, professional service, locally serving	• Tenants enjoy areas with services and amenities and good access. Some enjoy being in walkable areas	**Strong** Locally-serving, small	**Strong** Locally-serving Medical Office park
Hospitality	• The current hospitality market is suffering due to Covid-19. Although leisure guests have remained and possibly even increased, the group business is completely gone • This is likely a short-term issue • Post Covid-19 should go back to a very healthy hospitality market	• Future demand potential is based upon the growth in tourism as well as business and medical travel • We estimate the demand for approximately 25 new hotel rooms per year in the Pinehurst market area (Moore County). Some of this could locate in Pinehurst	• Hotels and bed and breakfast establishments	• Hotels vary in their location decision criteria. Hotels catering to tourists want to be near the attraction (ocean, theme park). In this case, the attraction is golf • Hotels attracting businesses would like to be located near employment, amenities, and major highways	**Strong**	**Medium**
Golf	• Total on-course golf participation has remained relatively stable in the US • There has been an uptick in golf rounds played in Pinehurst area since Covid restrictions have eased • Market is currently performing well in the Pinehurst area	• Demand for golf should remain moderately strong in the area. There could be demand for up to 2-3 new golf courses in the overall area in the next 10 years • The area is well-known for golf, and the addition of the USGA's Golf House Pinehurst and five US Open Championships, should increase future demand	• There appears to be an increase in the demand for 9 hole courses across the country	• In the Pinehurst, Aberdeen, Southern Pines area • Near other courses	**Not Suitable**	**Possible** Back of house operation

Village Place

For-Sale Residential

- Would likely be infill development or part of a small, mixed-use development.
- Most likely small lot single-family detached or attached product. Attached product would include both townhome style and condominium style product.
- The demand for this product is deep, and the planning area can support as much for-sale product as desired.
- Pricing would vary based upon product type and positioning, but would likely be in the range of $300,000 to $500,000.

For-Rent Residential

- Could either be stand-alone or within a mixed-use project. Would likely be horizontal mixed-use as opposed to vertical mixed-use (e.g. the apartments are next to the retail and office, not above) given the rent ranges possible to achieve and the cost of construction. If rents rise to support residential over commercial, that would be an appropriate land use here as well.
- Most likely size of an apartment complex would be similar to The Greens (70-100 units).
- Rents would be similar to the newest apartments at the time of construction. At this point, the newest apartments in the market are The Greens at approximately $1.35/SF. At an average size of approximately 1,000 square feet, that would equate to a rent of approximately $1,350 per month.

Retail

- The retail would not be in the form of a stand-alone shopping center, unless the retail was located along NC 211. Given the current uses, it is unlikely that there would be a shopping center in the planning area along NC 211.
- The retail would be part of a mixed-use area or more small retail shops like currently exist along Rattlesnake Trail.
- The demand for retail is more limited in this configuration, and would be limited to 25,000 to 50,000 SF total at build-out.
- Rents would need to be $24-$30/SF to support new construction.
- Tenants would include those that support local residents and tourists (such as flower shops, gift shops, pharmacies, home goods, salons, restaurants, shoe stores, boutiques, and others). The demand is strong for a variety of retail shops.

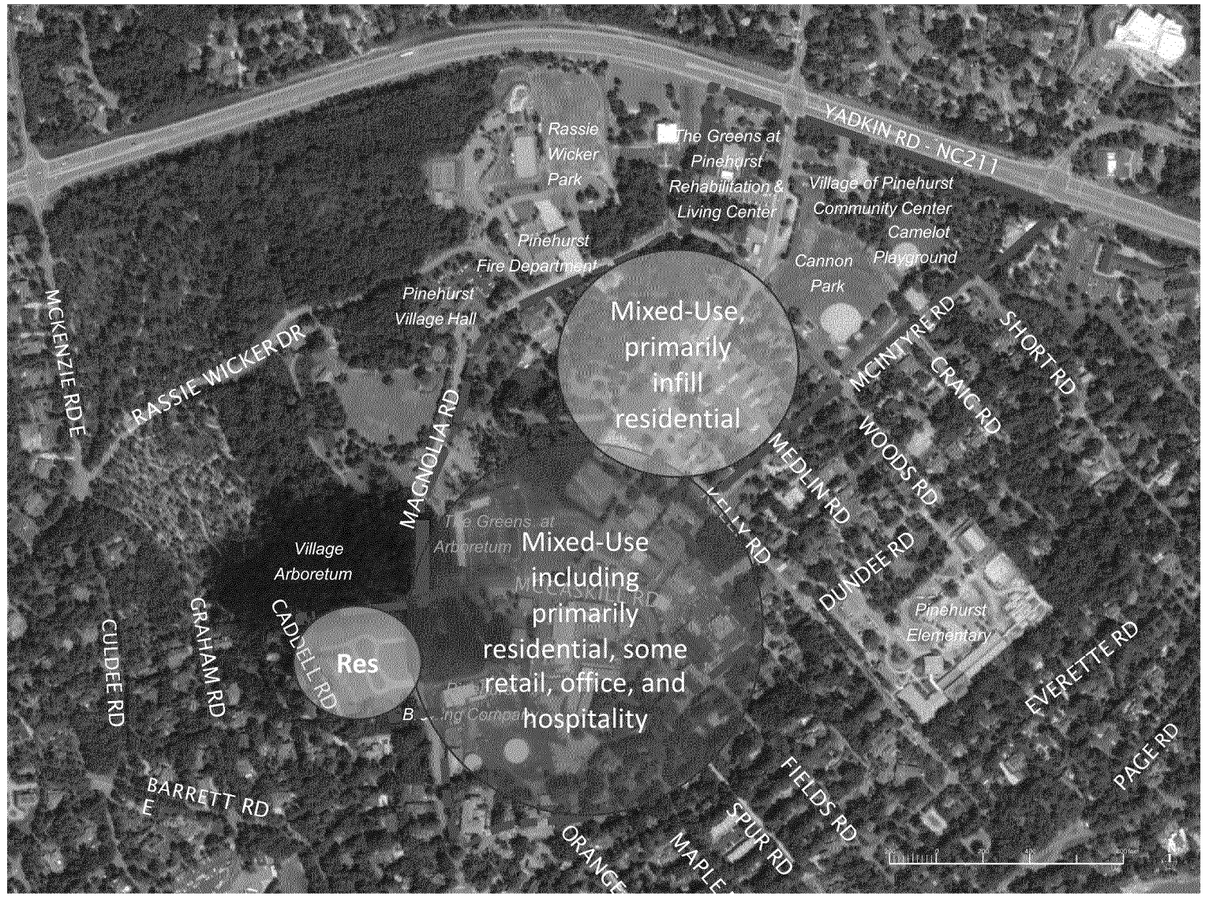
Office

- Office would be a supportive land use to the mixed-use area. It would be small offices, primarily locally-serving, including medical office.
- Given the amount of retail that could happen, we would anticipate the office to be less than or equal to the amount of retail, therefore, we would anticipate 25,000 to 30,000 SF of office at build-out.
- Rents would be in the $18-$22/SF range.

Hospitality

- Village Place could support a hotel as well as bed and breakfasts. They would likely support tourists, and potentially people visiting the hospital.
- Hospitality could also include rental product within homes.
- New hotels in the area tend to have 75-100 rooms. Bed and breakfasts and similar tend to have far fewer rooms, typically less than 10.

Possible Generalized Location for Land Uses Based upon Market Study



Pinehurst South

For-Sale Residential

- Likely a stand-alone residential community as opposed to mixed with other product.
- Given land availability, could have 1-2 projects. Each would be 30-50 units. However, the demand for this product is deep, and the planning area can support as much for-sale product as desired.
- Could be either single-family detached or attached product.
- Pricing would vary based upon product type and positioning, but would likely be in the range of $250,000 to $450,000.

For-Rent Residential

- Could be either a stand-alone larger community (typically larger, 150-200 units) or integrated into a mixed-use area.
- Integrated into a mixed-use area, the apartments would still likely be horizontal mixed-use (e.g. the apartments are next to the retail and office, not above). This would likely be a smaller project (80-120 units).
- Rents would be similar to the newest apartments at the time of construction. At this point, the newest apartments in the market are The Greens at approximately $1.35/SF. At an average size of approximately 1,000 square feet, that would equate to a rent of approximately $1,350 per month.

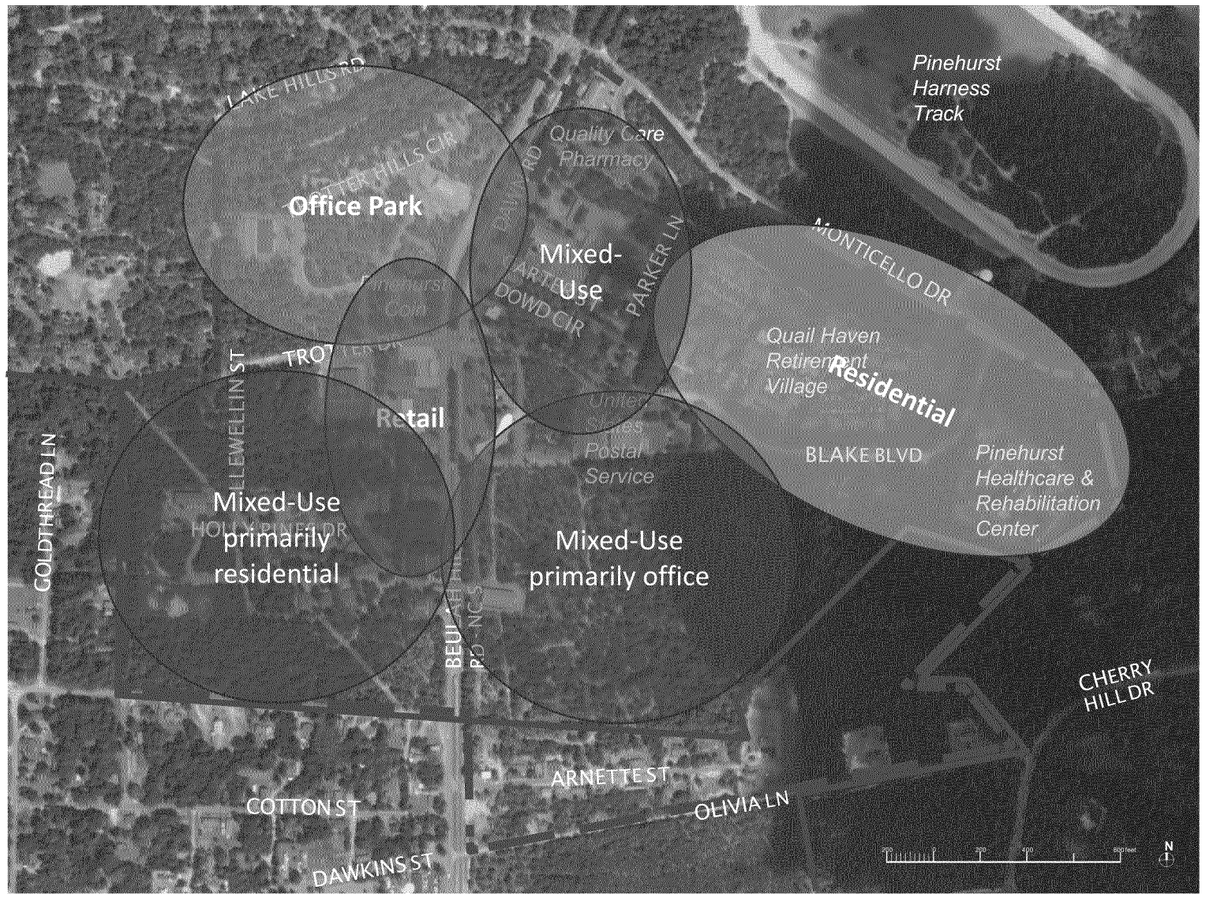
Retail

- Any retail would prefer to be located and accessed off of NC 5. If a project were created on the east side of NC 5, it would still be important to have NC 5 visibility.
- Could be a stand-alone shopping center on the west side of Hwy 5. This would depend on having an anchor within the project such as a grocery store or drug store. The size of the center would depend on what type of anchor, ranging from 50,000-80,000 SF in size total. This would likely not materialize for some time as the area continues to develop and mature.
- There is also demand for retail on the east side of NC 5. Due to access issues, it would be small-scale, and just to support local businesses and residents. There would likely be less than 10,000 SF total.
- If there was a shopping center on the west side of NC 5, the retail on the east side would be more limited, and vice versa.
- Any retail located within Pinehurst South would be locally serving.
- The maximum amount of retail in the area is likely to be 80,000 SF with a grocery store, and less than 40,000 SF without a grocery store at build-out.
- Rents would need to be $24-$30/SF to support new construction.

Office

- Office could either be like the product available at Turnberry (small format, 1-2 story) or integrated into a mixed-use center.
- Although there is not a lot of office demand annually, given the limited amount of office land available in other areas, this would be an appropriate location to save land for future office use.
- Even at 2,000 SF of office per year, in 50 years, the total amount would be 100,000 SF.
- Tenants and owner-occupied space would be a collection of medical, locally-serving professional services, and potentially related to the USGA.
- Rents for office would be in the $18-$22/SF range.
- Part of the area could be a modified Innovation Hub – meaning it could be planned to attract and facilitate companies and technologies related to golf, but be willing to accept other industries and users as well.

Possible Generalized Location for Land Uses Based upon Market Study



Hospitality

- The planning area could support a hotel if it were part of a mixed-use area. If there were enough businesses, it could support the workers in the area. Otherwise, it would likely support tourists. Type of hotel depends on place creation.
- A new hotel would likely have around 100 rooms.

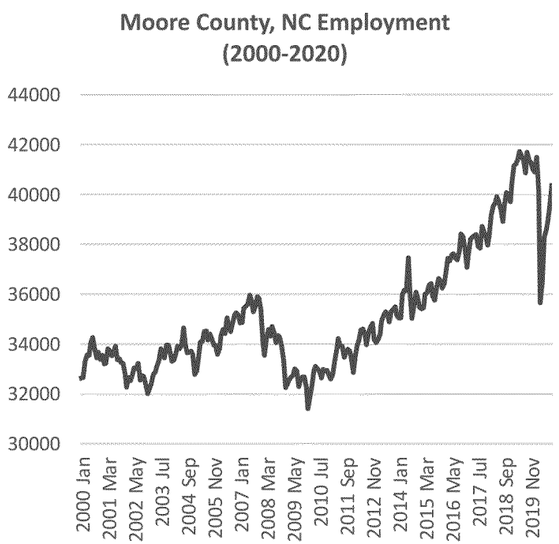
MARKET STUDY

ECONOMIC AND DEMOGRAPHIC ANALYSIS

Economic Analysis

The United States officially started a recession in March 2020 due to the Covid-19 pandemic. This ended the expansion in the economy since the end of the Great Recession in June 2009. Moore County experienced significant and steady employment growth during this period of expansion, climbing from approximately 31,000 jobs in January 2010 to 42,000 jobs in June 2019. Just like the rest of the country, jobs dropped swiftly due to Covid-19 from 41,489 in February 2020 to a low of 35,661 in April 2020.

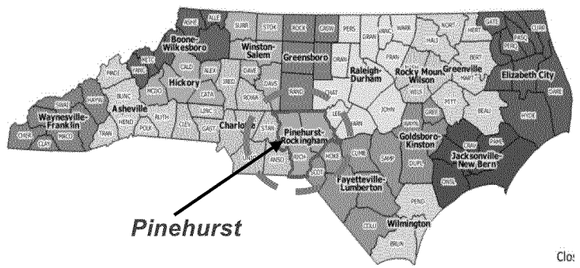
Since that time, jobs have recovered almost to pre-Covid levels to 40,352 jobs in October 2020. While the exact duration of the Covid-19 epidemic is unknown, vaccines, as of December 2020, are just beginning to role out to the country. The timing of the full recovery is unknown, but economists view the vaccination of the population as a good sign for recovery.



Source: BLS

Pinehurst Village and Moore County are part of the North Carolina Department of Commerce, Labor & Economic Analysis Pinehurst-Rockingham region which includes Moore, Montgomery, and Richmond Counties. Of these three counties, the majority of the employment is located within Moore County within the Pinehurst-Aberdeen-Southern Pines area. Employment projections are made by industry at this planning area level.

Map of North Carolina by NC Department of Commerce Regions



Source: North Carolina Department of Commerce, Labor & Economic Analysis

The outlook for employment is relatively strong overall with an average annual growth rate of approximately 0.6% or approximately 350 new jobs per year. Over the ten-year period from 2017 to 2026, the highest growth industries within the planning area are projected to be: Health Care and Social Assistance (avg. weekly salary of $937), Accommodation and Food Services (avg. weekly salary of $322), Retail Trade (avg. weekly salary of $480), and Construction (avg. weekly salary of $883).

Overall, the employment growth rate projected for the region (approximately 0.6% per year) is less than the overall employment growth rate projected for the state (approximately 0.9% per year). However, 350 new jobs are projected annually in the region. Given the concentration of health care within Pinehurst, it is likely much of this job growth will be located within the Village. The employment within the Village is not very diversified.

The largest concentrations of jobs in Pinehurst are Health Care and Social Services (52%) and Accommodation and Food Services (25%). These industries are expected to grow, thereby bringing additional jobs to the Village.

Jobs by Industry in Pinehurst (2020)

Industry	Businesses	%	Employees	%
Health Care and Social Services	575	54%	5,880	52%
Accommodation and Food Services	42	4%	2,839	25%
Other Services - Repair, Personal Care, Laundry, Religious, etc.	69	6%	434	4%
Professional, Scientific, and Technical Services	58	5%	396	3%
Arts, Sports, Entertainment, and Recreation	23	2%	358	3%
Retail: Home, Food, Automobiles, Personal Care	35	3%	262	2%
Education	11	1%	257	2%
Real Estate and Rentals	47	4%	234	2%
Public Administration	12	1%	173	2%
Banking, Finance and Insurance	56	5%	145	1%
Construction	25	2%	89	1%
Information	12	1%	85	1%
Other	108	10%	248	2%
Total	**1,073**	**100%**	**11,400**	**100%**

Source: North Carolina Department of Commerce, Labor & Economic Analysis

In order to create more office space, it would be important to try to diversify the jobs in Pinehurst. Jobs that typically lead to the demand for office space include: Health Care and Social Services; Professional, Scientific, and Technical Services; Other Services, Real Estate and Rentals, Banking, Finance and Insurance; and Information. As stated above, the likely job growth in the health care sector will lead to demand for medical office space. There is some job growth projected in the other industries that leads to the demand for standard office space.

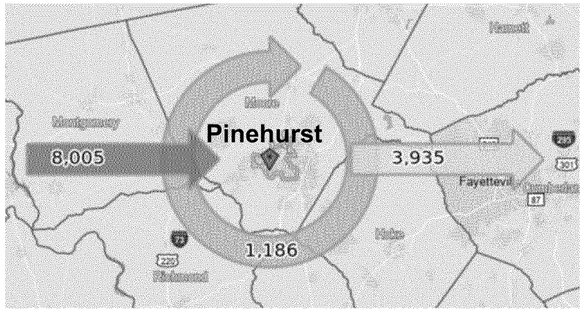
Additional economic (job) data is provided in the Appendix.

Commuter Analysis

Commuting data is available for both where people work and where workers live. Approximately 8,000 people commute into Pinehurst to work, 1,200 both live and work in Pinehurst, and 4,000 leave Pinehurst to work somewhere else.

The 8,005 people that come into Pinehurst everyday for work and the 4,000 people that leave for work represent an opportunity to "capture" them in Pinehurst to help reduce traffic and create more mixed-use environments.

Inflow and Outflow of Workers in Pinehurst (2017)



Source Census on the Map

People Who Work in Pinehurst (Where Workers in Pinehurst Live)

Of the people that work in Pinehurst, approximately 50% of them are aged 30-54, while 32% are over the age of 55, and 18% are under the age of 29.

Almost half of the workers make more than $3,333 per month. Over 50% of the workforce has some college, an Associates degree, Bachelor's degree or higher.

People who work in Pinehurst come from the surrounding communities. Approximately 56% of workers in Pinehurst live in Moore County, followed by 9% from Richmond County, and 5% from Hoke County.

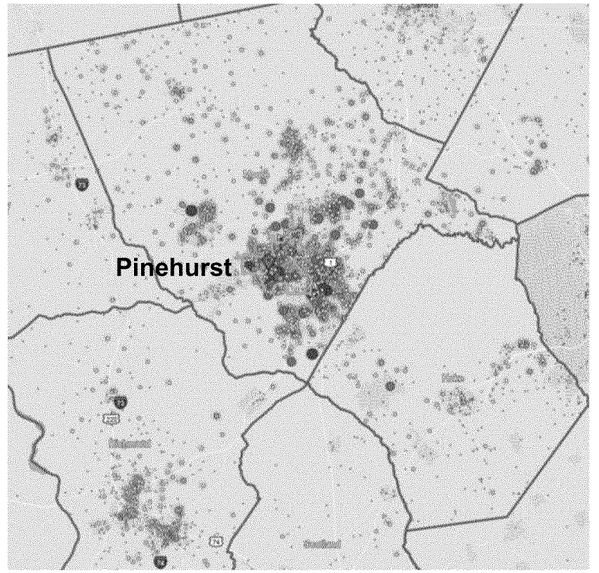
This is a fairly high capture of people who live and work in the same county. Moore County functions as the center of the economic region, so many people who live there also work there.

Job Counts by Counties Where Workers Live – All Jobs (2017)

	Count	Share
Moore County, NC	5,167	56%
Richmond County, NC	832	9%
Hoke County, NC	444	5%
Lee County, NC	339	4%
Montgomery County, NC	290	3%
Cumberland County, NC	283	3%
Harnett County, NC	249	3%
Scotland County, NC	188	2%
Wake County, NC	165	2%
Robeson County, NC	80	1%
All Other Locations	1,154	13%
All Counties	9,191	100%

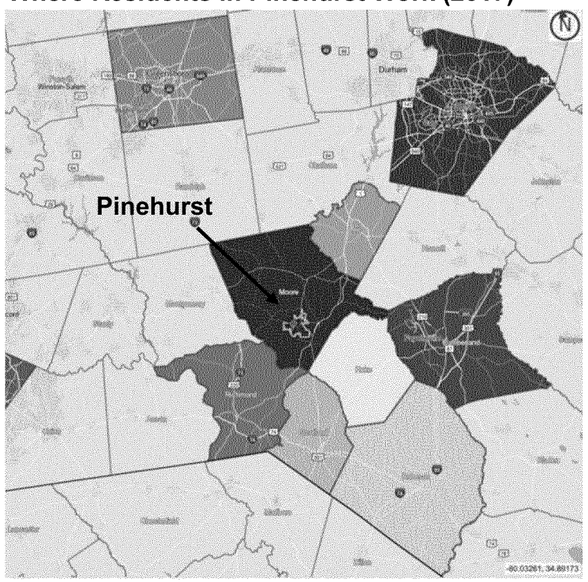
Source Census on the Map

Where Workers in Pinehurst Live (2017)



Source Census on the Map

Where Residents in Pinehurst Work (2017)



Source Census on the Map

Where Residents of Pinehurst Work

People who live in Pinehurst also tend to work in Moore County (57%). It is important to note that the Census on the Map data does not include uniformed military workers, and therefore would not include any potential workers at Fort Bragg in this analysis. The next largest group of residents work in Wake County/Raleigh area (6.8%), followed by Cumberland County/Fayetteville area (4.9%), and Mecklenburg County/Charlotte area (3.6%).

Job Counts by Counties Where Workers Are Employed – All Jobs (2017)

	Count	Share
Moore County, NC	2,897	57%
Wake County, NC	347	7%
Cumberland County, NC	253	5%
Mecklenburg County, NC	183	4%
Richmond County, NC	123	2%
Guilford County, NC	102	2%
Lee County, NC	77	2%
Scotland County, NC	76	2%
Robeson County, NC	71	1%
Hoke County, NC	65	1%
All Other Locations	927	18%
All Counties	5,121	100%

Source Census on the Map

Demographic Analysis

As of 2020, Moore County has approximately 44,000 households or roughly 1% of the state households. Household growth is anticipated to grow at a pace of 300 households per year until 2025. This household growth will drive the demand for housing and retail in the county.

Pinehurst has approximately 7,900 households or 18% of Moore County households. The Village is expected to grow by approximately 43 households per year over the next five years. Pinehurst is expected to experience less than its "fair share" of growth over the next five years. Although Pinehurst represents 18% of the households now, it is projected to capture only 14% of the growth. Part of this is due to the lack of available land and the cost of new housing compared to other areas.

Driven by employment growth and the desirability of Pinehurst as a second home and retirement destination, household growth will bolster demand for housing as new households move to the area seeking jobs or a lifestyle choice.

A variety of demographic data were analyzed to understand the make-up of Pinehurst Village residents and how they compare to surrounding areas.

Pinehurst has a much larger percentage of people over the age of 65 than comparison areas. This is not surprising given the Village is made-up of a large number of golf courses, resort-style communities, and is a popular destination for retirement and second homes.

Pinehurst also has a higher percentage of households that make over $100,000. They have a relatively low percentage of households with incomes under $30,000. This is consistent with the housing prices and age of the households in the Village.

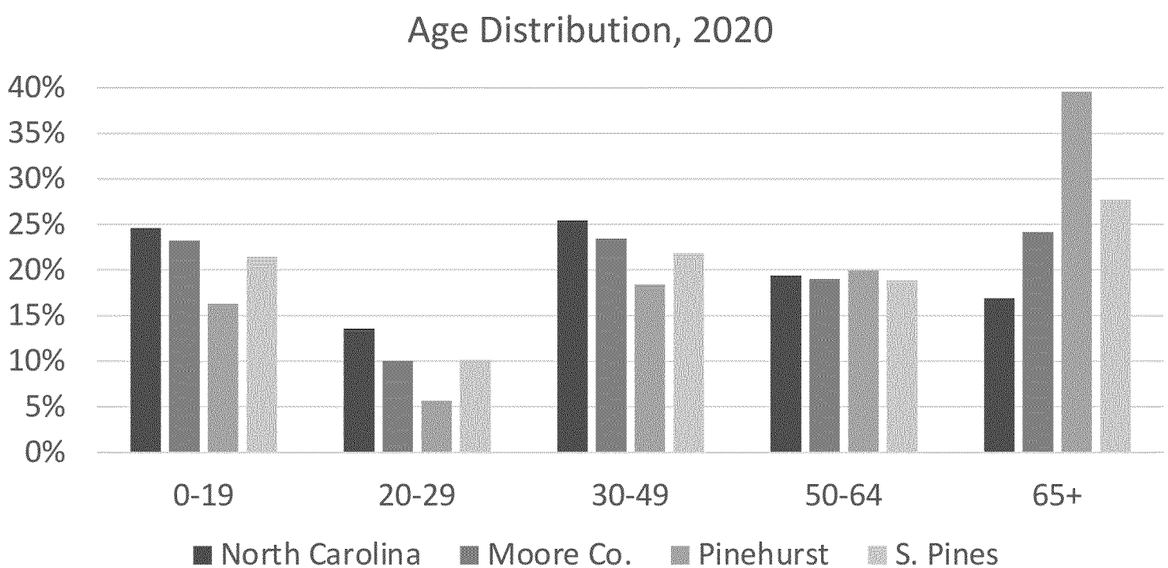
The vast majority (87%) of the households in Pinehurst are White (non-hispanic).

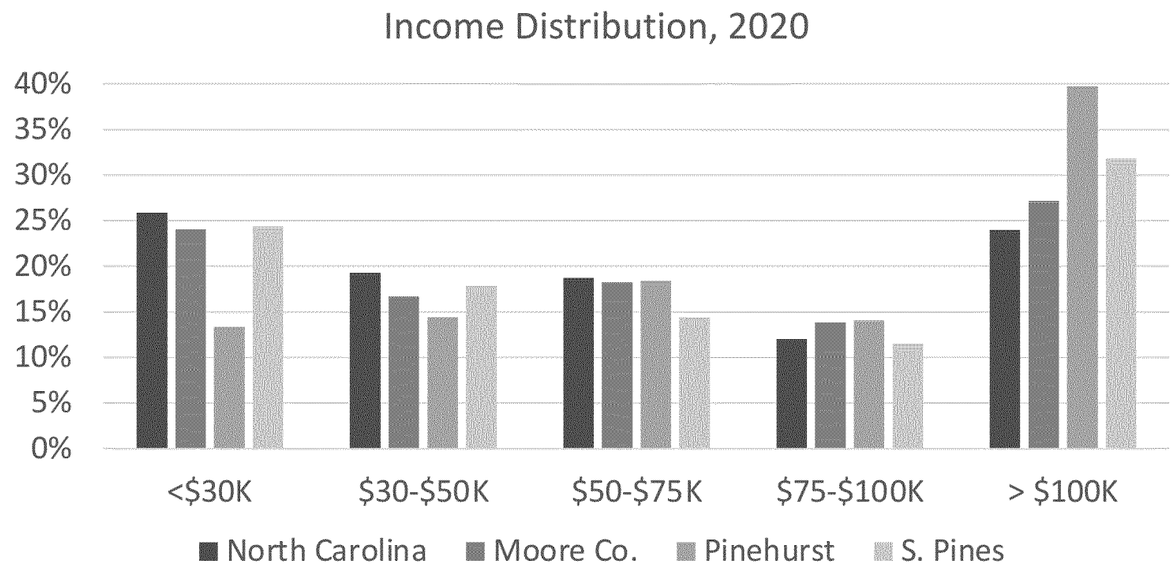
Additional demographic charts are provided in the Appendix.

Household Data for NC, Moore County, Pinehurst, and Southern Pines (2020-2025)

Geography	2020	2025	Growth	Annual Growth Rate
North Carolina	4,341,543	4,494,724	153,181	0.7%
Moore County	43,651	45,169	1,518	0.7%
Moore Co. as % of NC	1.0%	1.0%	1.0%	
Pinehurst Village	7,885	8,100	215	0.5%
Pinehurst as % of Moore	18.1%	17.9%	14.2%	
Southern Pines Town	7,142	7,207	65	0.2%
Southern Pines as % of Moore	16.4%	16.0%	4.3%	

Source: AccessNC, North Carolina Department of Commerce, Labor and Economic Analysis



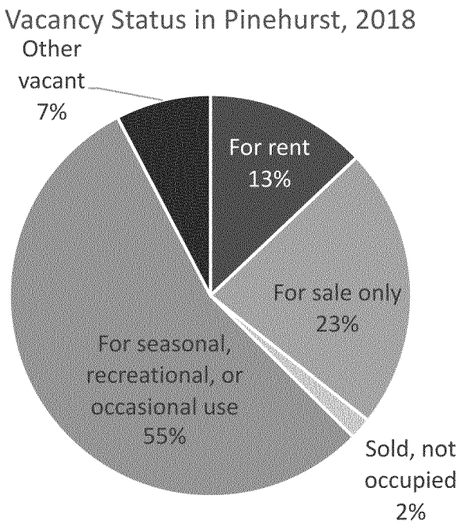


Source: AccessNC, North Carolina Department of Commerce, Labor and Economic Analysis

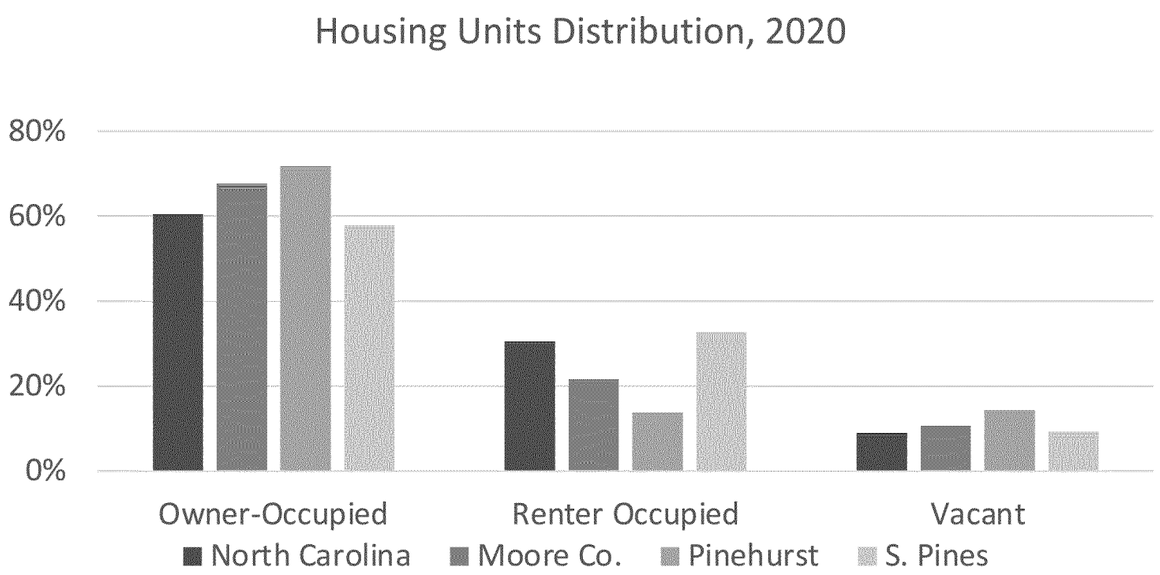
Housing Unit Data from the Census

The majority of the housing units in Pinehurst are owner-occupied (72%). This is higher than all of the comparison areas. Approximately 14% of units are renter-occupied, and 14% are vacant.

Of the vacant units, approximately 55% of them are for seasonal use (a second home). Pinehurst has a fairly large number of second homes.



Source: American Community Survey, 5 year estimates, 2018



Source: AccessNC, North Carolina Department of Commerce, Labor and Economic Analysis

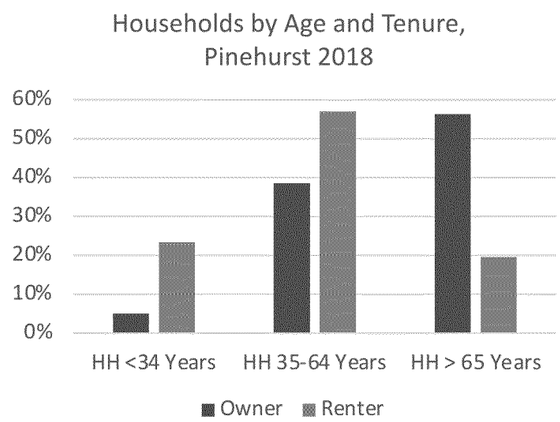
Owner and Renter Data from the Census

The largest group of households in Pinehurst are married couples without kids who own their homes. That group makes up almost half of all households in the Village. The second largest group (almost 25%) are nonfamily households that own. These could be singles or roommates.

These groups are followed by married couples with kids that own their homes (9%) and nonfamily households that rent (8%). These four groups make up nearly 75% of households within the Village.

Approximately 12% of owner-occupied households have children, while 27% of renter-occupied households have children. This is different than most places where owner-occupied housing tends to have more children than renter-occupied housing. This is likely due to the age of the population.

Renter households tend to be younger than the owner-occupied households.



	Owner-Occupied			Renter-Occupied		
	No	% of Owner	% of Total	No	% of Renter	% of Total
Married-Couple w/Kids	665	11%	9%	249	23%	4%
Married-couple w/o Kids	3,476	58%	49%	207	19%	3%
Single Male Headed HH w/kids	45	1%	1%	0	0%	0%
Single Male HH w/o Kids	32	1%	0%	14	1%	0%
Famale Headed HH w/Kids	58	1%	1%	41	4%	1%
Female Headed HH w/o Kids	70	1%	1%	28	3%	0%
Nonfamily HH (single, roommates)	1,679	28%	24%	541	50%	8%
Total	6,025	100%	85%	1,080	100%	15%

Source: American Community Survey, 5 year estimates, 2018

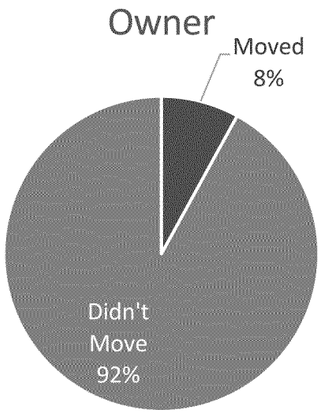
Geographic Mobility Data from the Census

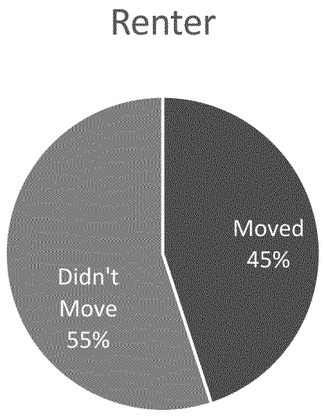
Approximately 8% of owner-occupied households moved in the previous year. This is very similar to the national average of 7.7% of owners moving in the previous year.

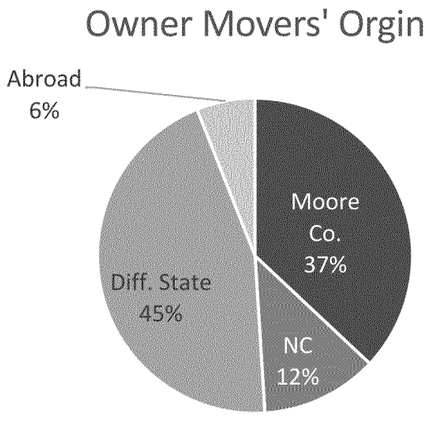
Based upon this data, approximately one-half of new owner households in Pinehurst will come from outside of the state, 40% are moving within Moore County, and 10% from another location within North Carolina.

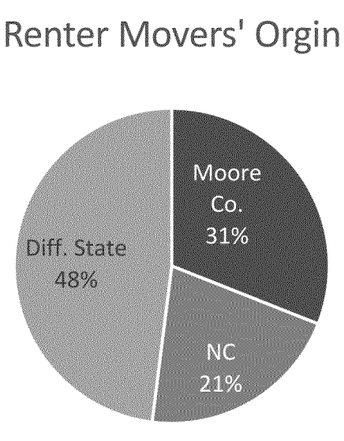
Approximately 45% of renter-occupied households moved in the previous year. This is significantly higher than the national average of 23% of renters moving in the previous year.

Based upon this data, approximately one-half of new renter households in Pinehurst will come from outside of the state, 30% are moving within Moore County, and 20% from another location within North Carolina.









Economic and Demographic Information Summary

The projected job and household growth provides a solid background for the demand for multiple land uses within the Village of Pinehurst. The Village's jobs are concentrated in health care and hospitality and the households are fairly homogeneous.

Jobs in Pinehurst are expected to grow at a stable rate over the next few years. Catalytic events such as the USGA could bring additional, unexpected jobs to the area. The USGA is currently planning on bringing 50 jobs to Pinehurst. In general, the employment in Pinehurst is concentrated in health care, accommodation, and food service.

Almost 60% of the people who work in Pinehurst live in Moore County. The reverse is also true – almost 60% of the residents of Pinehurst that work are employed in Moore County. This is a fairly high capture suggesting Moore County has a fairly insular employment market.

Similar to employment, households are projected to grow at a stable rate in Pinehurst. The typical Pinehurst resident is a married couple over the age of 50, well-educated, affluent, and white.

The majority of residents in Pinehurst own their homes. There is a fairly sizeable amount of second homes in the community as well compared to the national average. People who move to Pinehurst are split between those from outside of the area and state (50%) and those from the area (30-40%).

The economic and demographic data for Pinehurst provides a strong foundation for the demand for additional land uses.

Innovation Districts and Attracting High-Tech Jobs

Innovation Districts are dense, walkable, mixed-use areas that facilitate the creation and commercialization of new ideas. They connect research/technology/anchor institutions with people and companies that can leverage those ideas into new jobs and technologies.

Innovation Districts, no matter how big or small, or whether in a large metropolitan area or a small community like Pinehurst, need to have anchors – such as universities, medical research centers, cultural attractions, etc. They are places where residents can live, work, and play in a vibrant area that fosters creativity and technology transfer. Many smaller communities appear to be trending towards an arts and culture type Innovation District bringing together artists, visitors, and residents.

In the *2019 Comprehensive Plan, Envision the Village*, The Village of Pinehurst had designated Pinehurst South as an "Innovation Hub" that would create "one connected master planned area with a primary focus on office, medical, life science, and research facilities with small-scale supporting retail services… It could also include a residential component as well."

A report published by the Brookings Institute in May 2014 titled, "The Rise of the Innovative Districts: A New Geography of Innovative America" was referenced to identify ingredients necessary for an Innovative District. Current conditions in Pinehurst South were examined to determine the necessary steps to create these ingredients in the area.

Given current conditions, most of the ingredients of successful Innovation Districts are not present in Pinehurst South.

Ingredients for Innovation Districts

Ingredient	Exists in Pinehurst South	Can it be Created?	Necessary Steps to Achieve
Physically Compact	N	Y	• Introduce more density into the areas • Ensure projects help create a strong street experience
Transit-Accessible	N	N	• Not relevant in a geography like Pinehurst
Mixed-Use	N	Y	• While there are a mix of land uses in the study area, the areas are not "mixed-use" • Encourage mixed-use and multiuse development
Presence of Anchor Institution (University or medical)	N	Maybe	• Would need to identify potential anchors. Most likely in Pinehurst would be related to golf or medical
Close to Downtown	N	N	• Cannot change the physical location
Historic Building Stock	N	N	• Historic building stock can't be created, but compatible architecture can be encouraged
Current Location of Technology, Research, Creative Fields, and/or Small Batch Manufacturing	N	Maybe	• Need to create the type of environment where they want to locate (compact, walkable, etc.)
Current Location of Entrepreneurs	N	Maybe	• Need to create cultivators that support entrepreneurs (such as incubators) • Need to create the environment to attract entrepreneurs (edgy, exciting, walkable, mixed-use, etc.)
Location of Cultivators (Incubator, Accelerator, Tech Transfer Offices, Etc.)	N	Maybe	• Would need to create these types of programs and spaces
Neighborhood Amenities (Medical, Grocery, Drug Store, Restaurants, Etc.)	Some	Y	• Encourage this type of development • Support the market when necessary
Public Realm Spaces (Parks, Plazas)	N	Y	• A focal point public realm space would need to be created in Pinehurst South
Availability of Space for Start Up Businesses or Inexpensive Housing	Some	Y	• Relatively inexpensive housing is available near the area • Some available office space
Network Assets (Workshops, Training, Meetings, Breakfasts)	N	Y	• Would need to create a business community for the Pinehurst South area
Collaborative Leadership Network	N	Y	• No specific entity leads Pinehurst South. Would need to get government, medical, business community, landowners, and large tenants together to create network
Clear Vision	N	Y	• Need to finalize the vision and set aside resources to move forward

As shown on the previous chart, creating an Innovation District or Hub is more than just creating the physical space; programming, vision, and the community would need to come together to make it happen.

For Pinehurst, it would make sense to focus on a narrow scope of industries or technologies. Given the jobs and talent currently available in Pinehurst, the golf and tourism markets would likely be most viable. Although there is a concentration of health care in Pinehurst, most of it is health care providers – not research institutions. In addition, it would be hard to compete with large University health care systems to compete for health care technology firms and jobs. Finally, if health care technology or research were to be expanded in Pinehurst, it would be most advantageous to locate it near the current Medical District.

Pinehurst can emphasize its lower cost of living, quality of life, and specialized talent pool. The goal of creating an Innovation Hub would be to capture some of the economic benefits that an innovation economy can deliver while not trying to compete for technology jobs that aren't likely to locate in the area.

The best feature of Pinehurst South with respect to an Innovation Hub is its availability of land and location relatively close to the new USGA facility. The biggest deficits are the lack of an existing anchor institute within the boundaries, a disjointed land use pattern, limited walkability, and low density layout.

The research from the market analysis suggests the following ideas which should be articulated more fully in a vision for the area.

Pinehurst South could be a modified Innovation Hub – meaning it could be planned to attract and facilitate companies and technologies related to golf, but be willing to accept other industries and users as well. The creation of a walkable area with a strong sense of place would be attractive to a variety of users, residents, and visitors.

The market analysis provides the following critical success factors for attracting users to Pinehurst South:

- Create a vision - The intent of this hub is to facilitate new connections and ideas, accelerate the commercialization of those ideas, and support Pinehurst by growing jobs in a way that leverages its distinct economic position
- Create a strong sense of place - Determine the focal point, add other uses, make it walkable, provide a variety of neighborhood amenities
- Make a unique district - Use the existing golf, trees, culture, and quality of life amenities within Pinehurst and determine Pinehurst South's unique attributes
- Create a marketing and branding campaign - Build upon the strong brand recognition of Pinehurst and the USGA
- Improve pedestrian experience – Add sidewalk and places to walk
- Create a business incubator atmosphere – use the affordable housing to draw emerging businesses
- Benefit from the availability of underutilized land and space in Pinehurst South
- Take advantage of current investor and developer interest in NC 5 area
- Increase connectivity - Connect Pinehurst South to the rest of the Village and the surrounding areas to fully leverage nearby assets
- Work with partners – Work with USGA, Pinehurst Resort, Partners in Progress, and others to attract golf companies to the area. Help ensure Pinehurst South is the location for these new companies

Golf Innovation in Pinehurst Area

Partners in Progress, the economic development agency for Moore County, NC recently produced a video on the merits of golf industries and companies relocating to Pinehurst to create a cluster of golf businesses similar to what exists in Carlsbad, California.

The USGA is building a second headquarters in Pinehurst. It will include new offices, an equipment testing center, an innovation hub, and a golf museum/visitor center. Pinehurst South is approximately one mile from this new facility.

In addition to the USGA, Golf Pride opened a Golf Pride Global Innovation Center in 2019 near Pinehurst No. 8, approximately three miles from Pinehurst South. Golf Pride makes grips for golf clubs. The facility includes its management and professional teams, an R&D lab with rapid prototyping capabilities, and a new consumer grip fitting studio.

The area could also leverage the U.S. Kids Golf and the Carolinas Golf Association, both of which have headquarters in the area.

Innovation in Golf

Golf has seen a significant amount of innovation within the game, and is projected to continue to innovate. Some of the innovations include:

- State of the art practice facilities
- Technology to help players improve game
- Equipment
    - Golf clubs
    - Golf balls
    - Shoes
    - Gloves
    - Carts

In Carlsbad, California, there are a variety of golf club equipment companies that are located in the area including Titleist, Callaway Golf, TaylorMade, Cobra/Puma, and others. These companies create synergy and a collection of brain power for the industry. They represent a job cluster in the area. There is a goal to bring a similar cluster to the Pinehurst area.

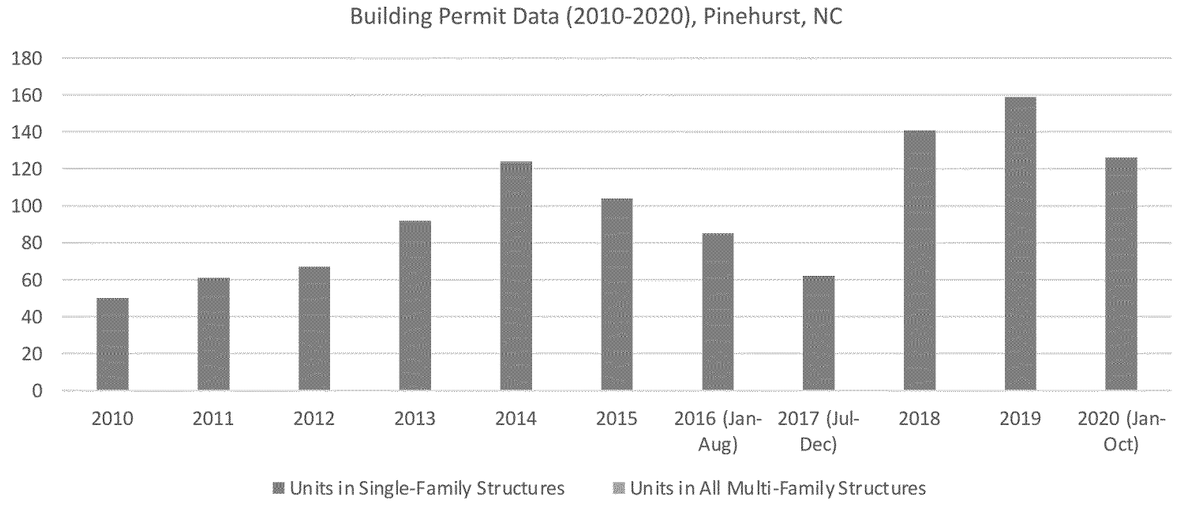


Source: Partners in Progress video

Existing Conditions

The national for-sale residential market remains strong. According to the U.S. Department of Housing and Urban Development, "National housing market indicators available as of November showed activity in housing markets improved overall. Housing market activity has rebounded as buyers take advantage of record-low mortgage rates and the economy reopened more broadly." This trend has been seen in Pinehurst as well. Sales have been strong and prices have continued to increase.

Permits in Moore County peaked in 2005 with just over 1,000 permits pulled. Permits bottomed out in 2009 at approximately 334, and never quite have reached back to the peak in 2005. In 2019, 836 permits were pulled. 2020 is on track to be another strong year with 654 permits pulled between January and September. Permits are a good indicator of new home sales in the market.

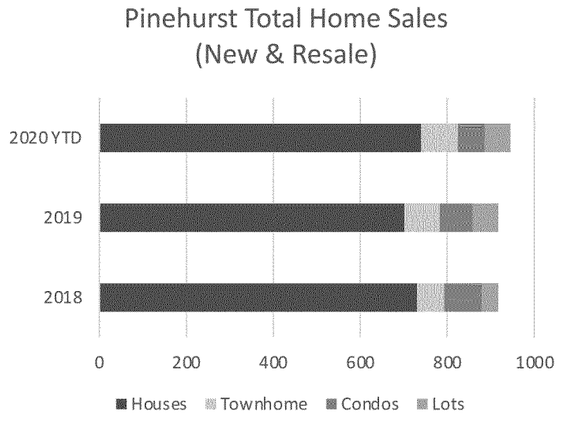


Source: Village of Pinehurst

Locally, in Pinehurst, permits are not as good an indicator of health in the residential market, as the area is much smaller and primarily built out. Permits in 2018 and 2019 were significantly higher (approximately 150 each year) than they were in previous years (83 on average between 2010 and 2015). Data is incomplete for 2016 and 2017. All of the recorded permits in the Village were for single-family units.

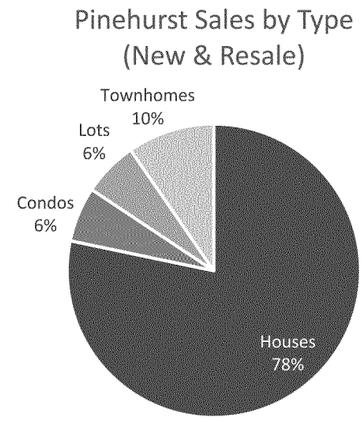
According to data available on Pinehurstrealty.com, there were approximately 2,200 total home sales in Moore County in 2019. This includes both new and resale homes. The average price was close to $300,000. Sales in 2020 are on track to be even higher than 2019, with a slightly higher price point.

Zillow data is available for Pinehurst. Data is available by "Last 12 Months", "Last 24 Months", and "Last 36 Months". Given the data was compiled in November 2020, we estimated "Last 12 Months" to be 2020, "Last 24 Months" less "Last 12 Months" to be 2019, and "Last 36 Months" less "Last 24 Months" to be 2018. The years are not exact, but a fair approximation. Based upon this data, there are approximately 900 home sales in Pinehurst annually including both new and resale. There are an additional 40-50 lots sold annually in the area.



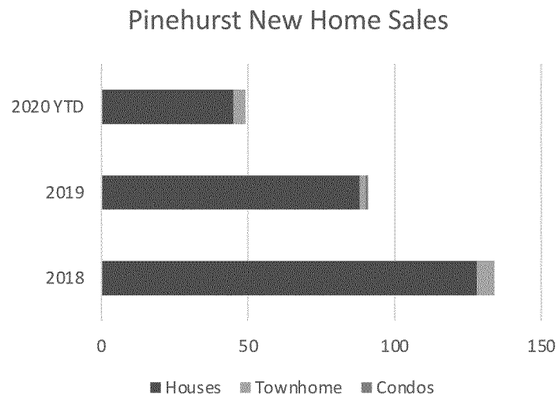
Source: Zillow.com

The large majority of sales, approximately 78%, are for single-family detached homes. Excluding lot sales, that number rises to 85% for single-family detached homes.



Source: Zillow.com

Utilizing the "year built" available in Zillow, we determined the number of homes that were new. Based upon this data, there are approximately 80-130 new homes sold per year in Pinehurst. This corresponds to the permit data available for Pinehurst. Therefore, approximately 10% to 15% of homes sold each year in Pinehurst are new. The large majority of them, approximately 90%, are for single-family detached homes.



Source: Zillow.com

Housing Data from the Census

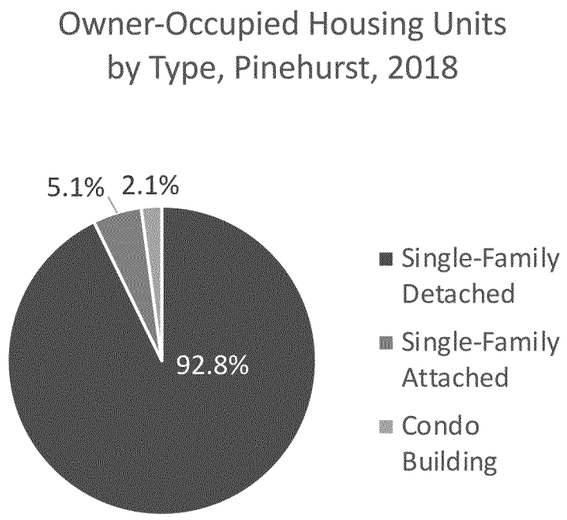
According to the Census (the American Community Survey), of the owner-occupied housing units in the Village of Pinehurst, approximately 93% of them are single-family detached. This is similar to the percentage of sales on the previous page that are single-family detached.

The majority of owner-occupied homes were built between 1980 and 2009. The highest decade of building was in the 1990s. The drop in the number of homes built has more to do with land availability and the recession than it does with underlying home demand.

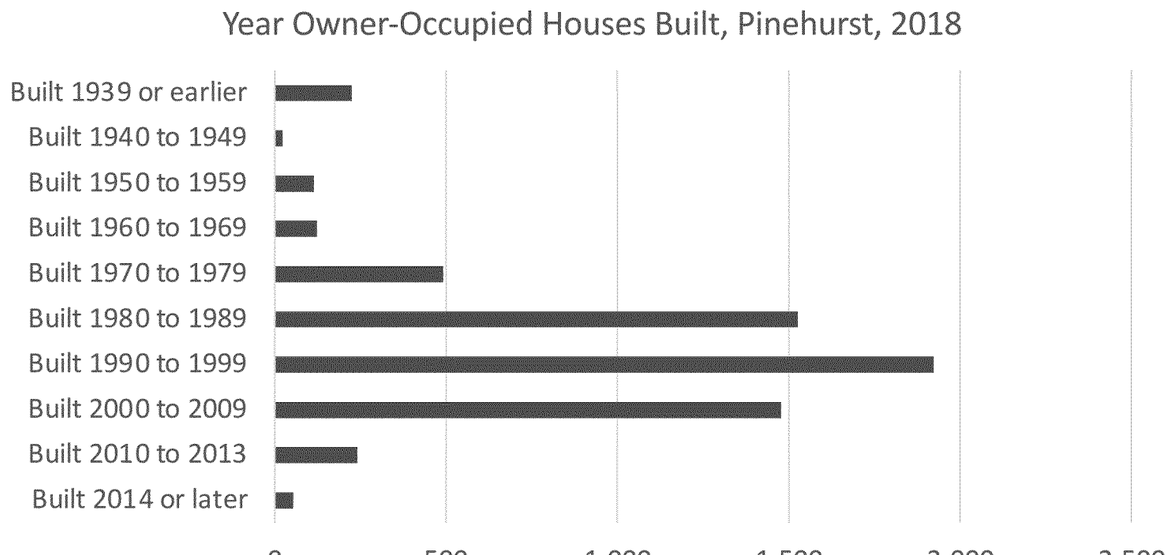
The median home value in the Village of Pinehurst is almost $300,000. The majority of homes have a value between $200,000 and $500,000. Between 2013 and 2018 the median home value increased approximately 4.5%, with the largest jump in the $300,000 to $500,000 category in 2018.

The Census reported approximately 5,712 owner-occupied housing units in Pinehurst. This increased to 6,191 in 2018. This increase of 479 homes is roughly an increase of 100 homes per year in the Village. This is very similar to the number of new homes sold each year as reported by Zillow on the previous page.

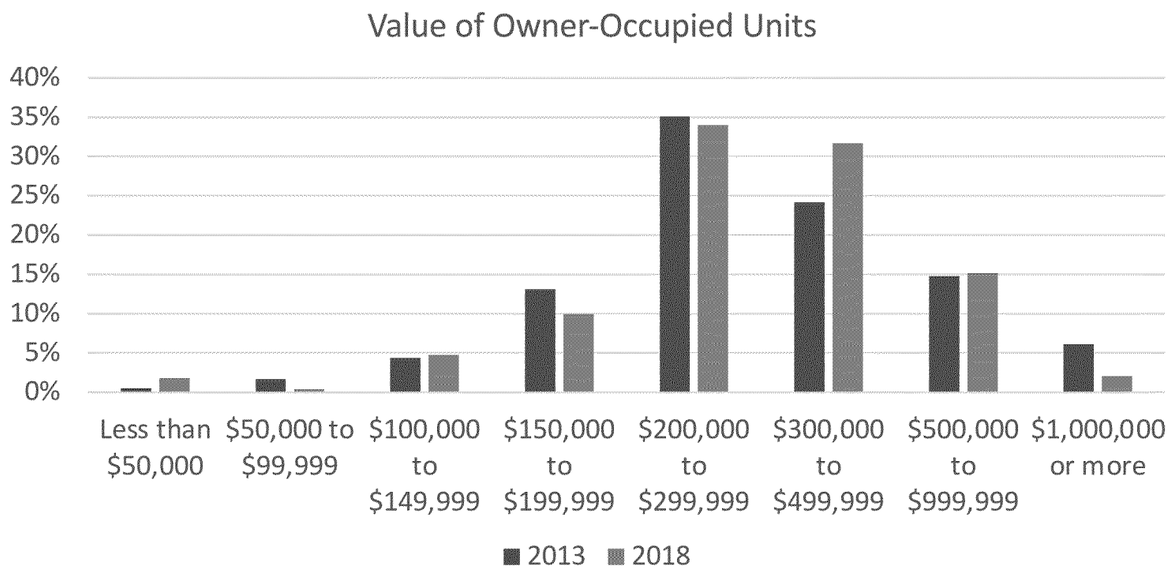
Approximately 56% of owners in the Village have a mortgage. This is down from 2013 when 65% of households reported having a mortgage.



Source: American Community Survey, 5 year estimates, 2018



Source: American Community Survey, 5 year estimates, 2018



Source: American Community Survey, 5 year estimates, 2018

Local Competitive Market

The for-sale market in Pinehurst is made up of established large-scale master-planned (MPC) golf-oriented communities (such as the Country Club of North Carolina or Pinewild Country Club). Within these large communities, there are a large number of resales as well as new home and lot sales. In addition to the typically older golf-oriented MPC and Old Town Pinehurst itself, there are smaller subdivisions in and around Pinehurst that tend to be non-amenity oriented, and feature smaller and less expensive housing.

Anecdotally, these two different types of communities attract a different buyer profile. The large MPC tend to attract older, wealthier couples and are often retirement or second homes. The smaller subdivisions attract a younger, family market, often military personnel that work in Fort Bragg.

The market is currently very tight in Pinehurst. Inventory is very low, and housing has been selling very quickly. Prices have been rising. Current buyers tend to be from outside of Pinehurst, looking to get away from the urban areas where they currently live. Feeder markets include New York, Chicago, California, Pennsylvania, Ohio, and others.

Outside of pandemic times, real estate agents report that buyers are a combination of: retirees (33%), military (33%), and others (33%). Others include people moving to be close to their kids or their parents, commuters, horse farm buyers, and land buyers.

We collected data on 18 communities in the area that offer new homes for sale. These homes are depicted on the map. Some of the communities, such as Walker Station, are all new home homes, with typically less than 100 units in the community. The other type of community is a golf-oriented MPC with a mixture of older, resale homes, lot sales, and infill new homes.

The projects are located both within and outside of the Village of Pinehurst. The market area for homes is wider than the village itself. Buyers would consider homes in the surrounding communities as well.

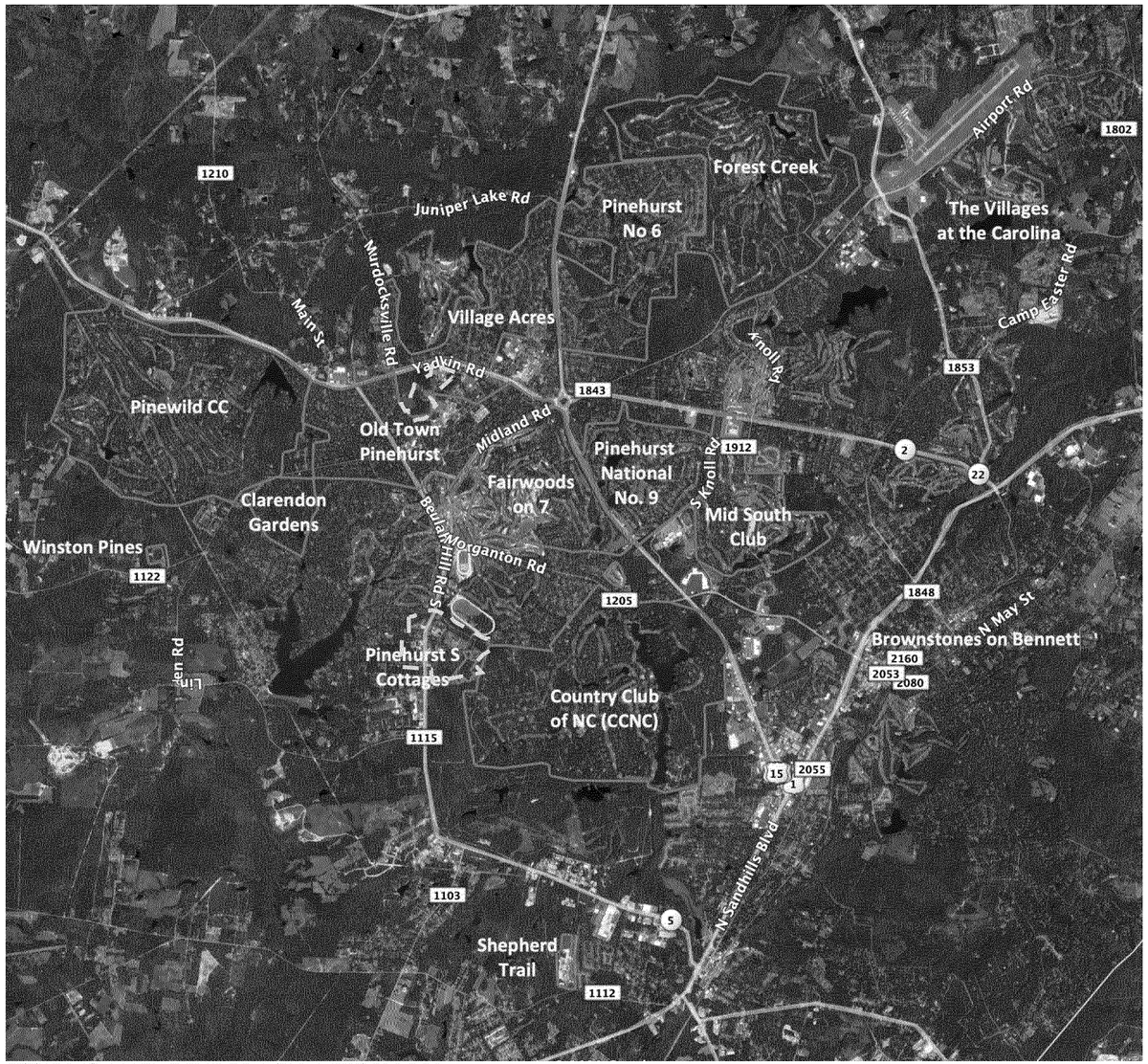
Based upon data from Zillow.com, the smaller subdivision communities tend to sell between 15-35 homes per year, with an average of around 20 new home sales per year. Almost all of the new homes sold in the area are for single-family detached homes.

These subdivision homes tend to be priced from $300,000 to $400,000, with homes between 2,000 and 3,500 square feet. The price to size charts included in the Appendix demonstrate the range of new home prices and sizes sold in each of the communities. The bottom axis shows the home sizes in square feet, and the side axis shows the home prices.

Based upon Zillow.com data, the larger golf-oriented communities can sell up to 50-75 homes per year, including both new and resale. The new home sales in these communities tend to be less than the resale home volume.

Home prices in these communities can vary widely given the age of the homes, sizes, orientation, and other factors. We examined both resale and new home prices. As shown on the price to size chart labeled, “For-Sale Homes Price to Size Chart – Large Golf-Oriented, New Homes Only” in the Appendix, there are two distinct ranges of these prices. The less expensive tend to sell new homes from $300,000 to $500,000, with homes between 1,700 and 3,500 square feet, similar to the subdivision homes. While the more expensive communities range from $500,000 to $1 million, with homes from 2,500 to 4,500 square feet on average.

More data is included in the Appendix.



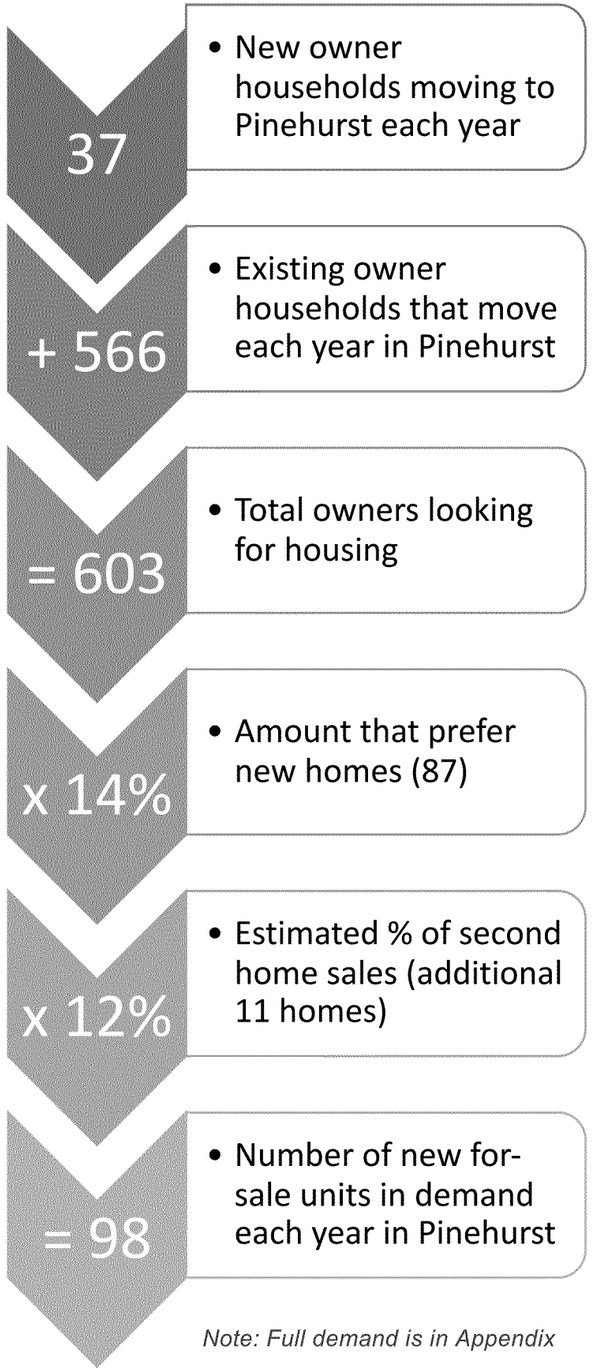
For-Sale Residential Projections

Duggal Real Estate Advisors completed a demand analysis for for-sale product within Pinehurst based upon projected household growth and existing households in turnover.

Based upon this analysis, there could be demand for an average of approximately 100 new for-sale units within the Village per year. Some years will have higher sales of new homes, and some years will have less. Having the potential for the demand does not mean the demand will or should be realized – it just indicates that based upon the demographics and preferences of households in the area, the Village could support these for-sale units if built.

The demand model utilizes the following information. The full detailed demand model is provided in the Appendix.

- Existing and new households within the Village of Pinehurst. The existing households include those that are moving each year (in turnover).
- The demand model is stratified by income to determine affordable house price. The households are further defined by being owner households.
- The number of new owner households is further refined by being likely to choose new product.



Note: Full demand is in Appendix

For-Sale Residential Market Summary

There is strong demand for for-sale residential product in the Village of Pinehurst, capturing expected household growth as well as filling the demand for primary homes, second homes, and retirement homes. Both planning areas, Village Place and Pinehurst South, are appropriate locations for for-sale residential.

Permits and sales continue to increase, suggesting a healthy market with strong demand fundamentals. Pinehurst is a popular area for housing given the historic character, architectural variety, and golf and other activities.

Home prices continue to rise in Pinehurst, but are still considered more attainable/affordable than similar housing in other parts of the country, making Pinehurst a very attractive area for retirement housing. New homes in non-golf oriented communities tend to sell for $300,000 to $500,000 on average, while new, infill housing in golf-oriented master-planned communities tend to sell for $450,000 to $750,000. There are new homes available both above and below those price ranges.

VP

Single-family homes selling in Village Place tend to be priced from $200,000 to $400,000. The two new homes that have sold in the area sold for approximately $300,000. New product within the study area could be a combination of small lot single-family detached, townhome/attached, and possibly condominium product. The price point would be above existing homes within the study area, likely within the middle band of new houses in the Pinehurst area. The pricing would depend on the location, amenities, and other development that occurs in the area.

PS

There are very few for-sale houses within the Pinehurst South study area. Just outside of the area to the west is a townhouse/attached home community built in the late 1980s that sells units for between approximately $180,000 and $230,000. For-sale homes would be marketable in the study area. There could be a combination of small lot single-family detached and townhome/villa product. The pricing would be above the existing product, and likely within the middle band of new houses in the Pinehurst area. The pricing would depend on the location, amenities, and other development that occurs in the area.

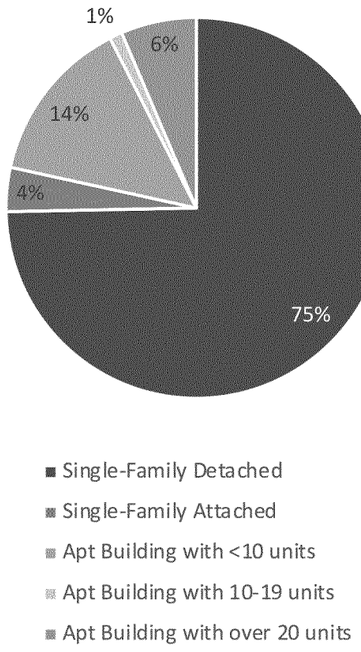
Pinehurst is projected to see strong owner household growth over the coming years; both Village Place and Pinehurst South could capture this growth and help create new, walkable, mixed-use neighborhoods.

Existing Conditions

Nationally, the apartment market has rebounded after having poorer performance directly after the shut-downs in the second quarter due to the coronavirus pandemic. This suggests that the underperformance was due to the lockdowns as opposed to changing demand conditions.

In Pinehurst, most of the renter-occupied housing is single-family detached housing, not an apartment building. The census data does not include short-term rentals under renter-occupied housing.

Pinehurst Renter-Occupied Housing Units by Type

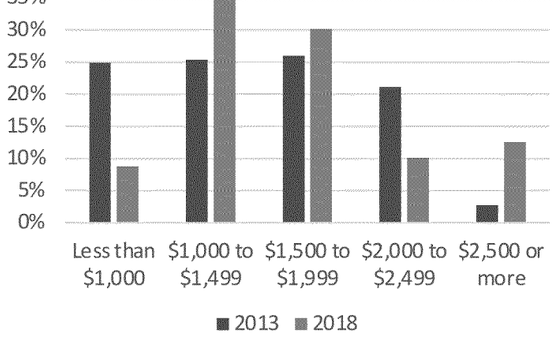


Source: ACS 5-Year Estimates (2018)

According to the American Community Survey (ACS) from the Census, the median rent in Pinehurst in 2018 was $1,547, with the majority of units renting for between $1,000 and $2,000 per month.

Rents have increased approximately 3.5% between 2013 and 2018. Approximately 170 rental units were added between 2013 and 2018, or 34 per year.

Pinehurst Occupied Apartment Units by Rent



Source: ACS 5-Year Estimates (2013 and 2018)

Local Competitive Market

We examined five existing apartment communities in the area and one planned apartment project in the area. On average, they are 97% occupied and have an average of 133 units. Renters are a mixture of transient renters (those waiting to buy or build a home), medical professionals, young professionals, military, and family.

The projects lease-up well, and have stayed well-occupied. The newest projects lease at approximately $1.20 to $1.40 per square foot ($1,100 to $1,600 per month).

Detailed information on each apartment is included in the Appendix.



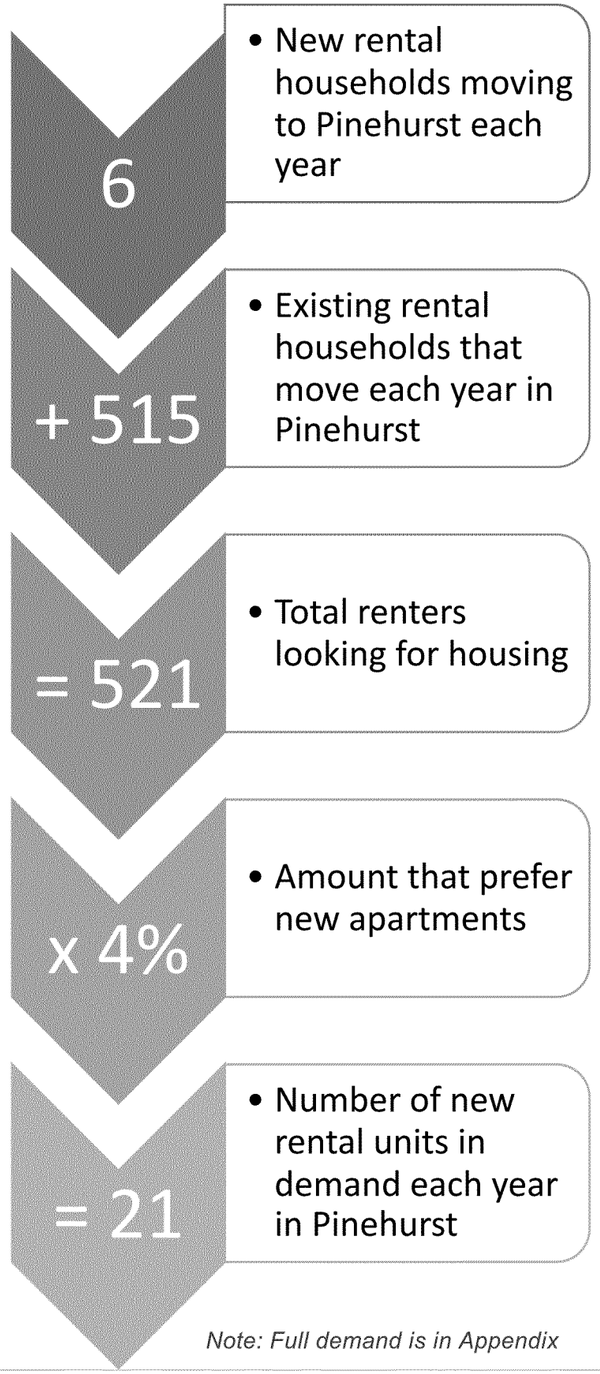
For-Rent Residential Projections

Duggal Real Estate Advisors completed a demand analysis for rental product within Pinehurst based upon projected household growth and existing households in turnover.

Based upon this analysis, there could be demand for approximately 20-25 new rental units within the Village per year on average. Some years will have no apartment construction, leading to pent up demand for future years. Having the potential for the demand does not mean the demand will or should be realized – it just indicates that based upon the demographics and preferences of households in the area, the Village could support these rental units if built.

The demand model utilizes the following information. The full detailed demand model is provided in the Appendix.

- Existing and new renter households within the Village of Pinehurst. The existing households include those that are moving each year (in turnover).
- The demand model is stratified by income to determine affordable rent. The households are further defined by being renter households.
- The number of new renter households is further refined by being likely to choose new product.
- With approximately 20 units in demand per year, the Village could support a new apartment complex, if land were available, about every three to eight years.



Note: Full demand is in Appendix

For-Rent Residential Market Summary

There is stable demand for for-rent residential product in the Village of Pinehurst, capturing expected household growth as well as filling the demand for transient renters (people waiting to move into a house, medical workers, military, etc.). Both planning areas are appropriate locations for for-rent residential.

Vacancy continues to remain low despite the addition of 180 apartment units in the region since 2020. Current vacancy is approximately 3%, indicating a strong, in-balance apartment market.

Rental rates, although not overly high compared to more suburban areas, have continued to rise in recent years. New rental product in Pinehurst is likely to rent at the higher end of the market, similar to The Greens at Arboretum. One bedrooms range from $1.43 to $1.63 per square foot ($1,000-$1,200/month), two bedrooms range from $1.18 to $1.26 per square foot ($1,200-$1,300/month), and three bedrooms range from $1.25 to $1.55 per square foot ($1,600-$2,200/month).

The Greens, a relatively new apartment complex, is located within Village Place. New for-rent residential would be marketable within the study area. It is walkable to the Village Core, is close to services and amenities, and close to open space. The rents would likely be similar to The Greens with an average rent of approximately $1,400 per month.

Pinehurst South currently has a rental townhome community, Abingdon Square Townhomes, and the Inn at Quail Haven Village, a senior continuing care retirement community (CCRC). It would be a marketable location for a rental community. It would be positioned slightly below new apartments in Village Place given it is not walkable and farther from services and amenities. The rents would likely be slightly lower than The Greens with an average rent of approximately $1,400 per month.

Pinehurst is projected to see modest rental household growth over the coming years; both Village Place and Pinehurst South could capture this growth and help create new, walkable, mixed-use neighborhoods.

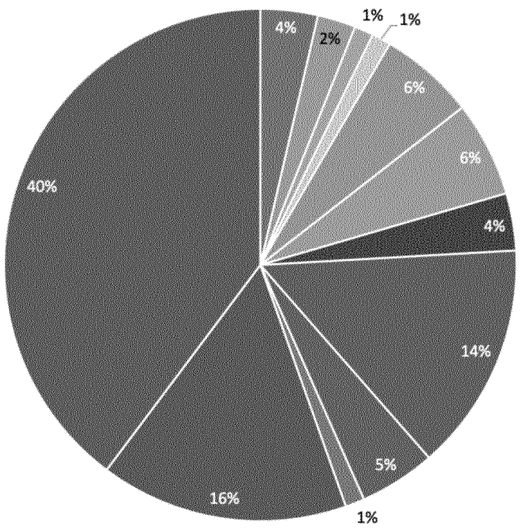
MARKET STUDY

RETAIL ANALYSIS

Existing Conditions

The national retail market has been impacted by Covid-19. Shutdowns throughout the country in retail and restaurants have hurt tenants and landlords. Stores that provide essentials (such as grocery stores or drugstores) have done better during the pandemic. Nationally there has been negative absorption of retail space (meaning more space was vacated than tenanted), and some tenants struggle to pay their rents. There has also been a wave of closures and bankruptcies. Nationally, the net absorption of new retail space is projected to take as long as mid-year 2022.

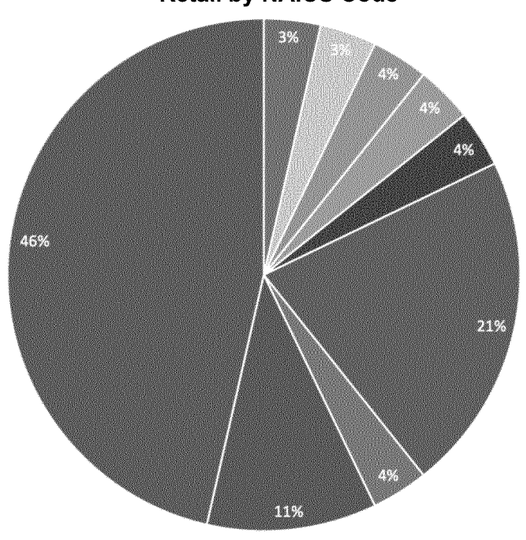
Pinehurst Village, Breakdown of Retail by NAICS Code



Locally, brokers have indicated that the overall the market is still doing well, with an estimated 5% vacancy rate. Centers with strong grocery anchors are performing better than average.

Pinehurst Village has approximately 85 retail businesses. Of these, approximately 30 (or 35%) are located within the Village Core. The largest percentage of retail businesses (40% in Village and 46% in Village Core) are Food Services and Drinking Places. Based upon Moore County Assessor data, there are approximately 165,000 square feet of retail in the Village. Most of the shopping of Village residents is done outside of the Village limits.

Pinehurst Village Center, Breakdown of Retail by NAICS Code



Source: Esri

Local Competitive Market

Retail in the Pinehurst area is made up of downtown retail, shopping/strip centers, and stand-alone corridor-oriented retail.

We collected data on eight different shopping centers in the area to understand the retail market in the area.

The shopping centers vary in size from 50,000 square feet at Pinehurst Plaza near Pinehurst South to almost 280,000 square feet at Pinecrest Plaza along US 15-501. The centers are approximately 94% occupied. Most of the shopping centers are located along US 15-501 and US 1. There are also shopping centers along NC 211.



Local Competitive Market Cont.

Lease rates in the area for well-placed retail tends to be in the mid $20s per square foot triplet net (NNN – meaning, the tenant is responsible for paying the taxes, insurance, and common area maintenance fees). The area has been slowly shifting from gross rents (where the landlord pays the taxes, insurance, and common area maintenance) to NNN rents. Triple net rents are more typical for retail across the country, while gross rents are more typical for office spaces.

Some new retail in the best locations has been reaching as high as the mid $30s/SF NNN. The best retail in the US 15-501 area is in the high $20s/SF NNN. Older retail in the area is typically in the low to mid teens ($13/SF NNN).

Interviews suggested that new retail would need to achieve around $24-$30/SF NNN in order to be viable.

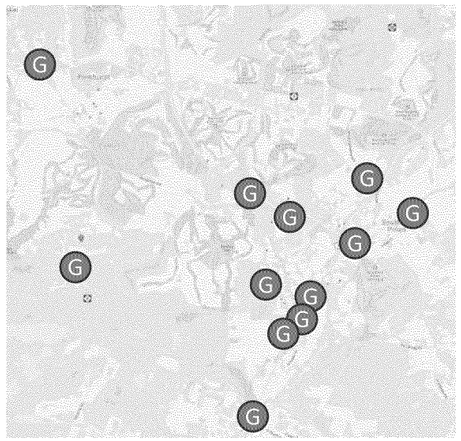
Pinehurst, Southern Pines & Aberdeen Area Estimated Retail Lease Rates

Location	Estimated Average Lease Rates
Downtown Southern Pines	$30/SF NNN
Downtown Pinehurst	$20-$24/SF NNN
Aberdeen	$12-$15/SF NNN
Newest retail in best locations	$30-$34/SF NNN
US 15-501 area strong retail	$27-$30/SF NNN
NC 5 near Pinehurst South	$12-$15/SF NNN
Older, outdated retail	$8-$12/SF NNN
General lease rate for reasonable retail	$20-$22/SF NNN

Source: Internet searches, broker conversations

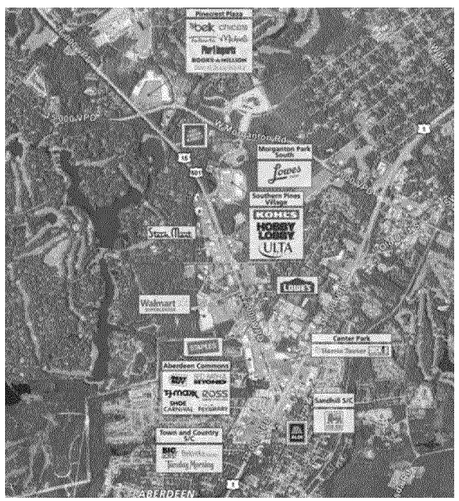
The Pinehurst area has a mixture of locally-serving (such as grocery stores, drugstores, restaurants) and regionally serving (such as department stores, big boxes, discount stores) retail. The locally serving is spread out somewhat throughout the area, while the regionally serving is concentrated in the US 15-501 area.

Grocery Store Locations



Source: Apple Maps

National Chain Store Locations



Source: Loopnet

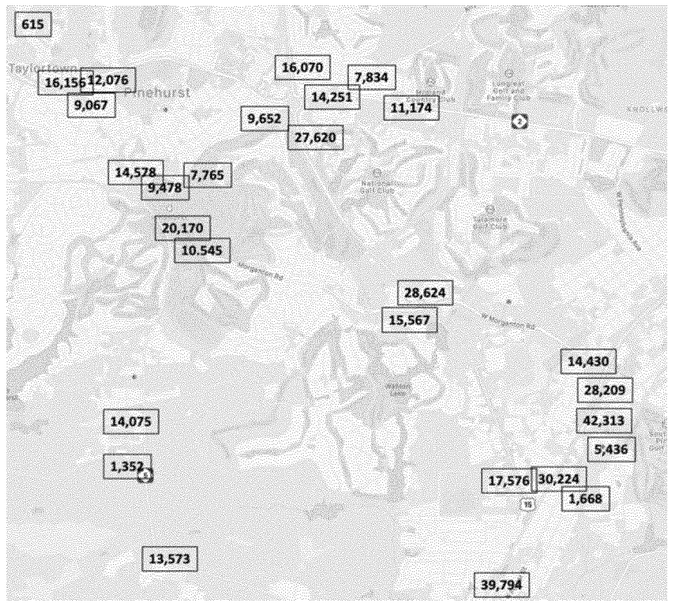
Site Selection

An important site decision criteria for retailers is traffic counts. Most retail tenants prefer to be located in an area with high traffic counts.

The traffic counts in the area are highest along US 15-501 with up to 30,000 or 40,000 cars per day. Near Pinehurst South along NC 5 there are approximately 15,000 cars per day, and along NC 211 near Village Place there are approximately 12,000 to 16,000 cars per day. There are less cars within the boundaries of each of the planning areas.

The amount of traffic required varies based upon location (urban, suburban, and rural, for example) and type of retail. A typical rule of thumb would be 20,000 cars per day. However, in a location like Pinehurst, 15,000 cars per day would likely meet the requirement. This is positive for retail near the planning areas.

Traffic Counts



Source: Loopnet

Other important criteria for retailers include the number of people that live within their trade area, the average household income, and sometimes education levels.

A national grocery store, for example, requires 40,000 people within three miles with median household incomes of $50,000 (source: ICSC).

The planning areas meet the requirements for many of the retailers. The population of Village of Pinehurst, Southern Pines, and Aberdeen combined is approximately 40,000. Pinehurst is is highly educated, and the median income is approximately $80,000.

The below tables are not absolutes, and are national averages. Likely in Pinehurst, retailers would be satisfied with lower requirements, but it provides an idea of what types of locations would be viable for different retail types.

Retail Tenants Site Selection Criteria

	Type	Mile Range	Min. Pop.	Avg. HH Income	Traffic Count
Locally Serving	Drug Store	1	10K	$20K	15K
	Grocery	3	40K	$50K	20K
	Salon	3	36K	$45K	5K
Regionally Serving	Clothing	5	100K	$60K	n/a
	Furniture	5	100K	$55K	25K
Food & Beverage	Sit-Down Rest.	3	56K	$50K	23K
	Fast Casual	1	10K	$50K	10K
	Coffee Shop	1	10K	$60K	25K

Source: Internet searches

Retail Projections

Duggal Real Estate Advisors completed a demand analysis for retail within Pinehurst based upon household retail expenditures and retail sales.

Based upon this analysis, there is a significant amount of retail leakage in Pinehurst – meaning that people in Pinehurst spend their retail dollars outside of the Village limits. This is not surprising given the location of the retail in the area and the size of the community; the retail in the Village functions as part of a larger market area.

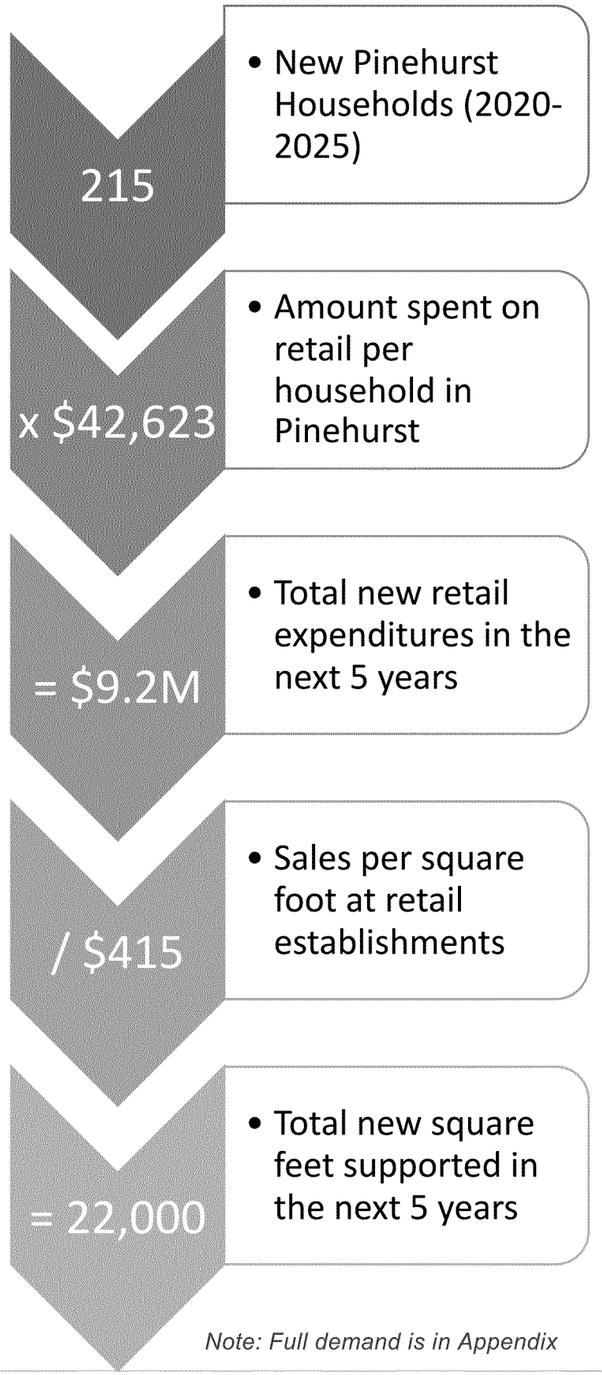
We also completed a demand model for Moore County overall. This also suggests leakage in many retail categories such as Motor Vehicle Dealers, Furniture Stores, Building Supply Stores, Gas Stations, Clothing Stores, and others.

In order to keep the demand for retail conservative, we focused demand potential based upon future household growth, as opposed to capturing retail demand that is being met in other areas or potentially on-line.

Based upon these demand models (provided in detail in the Appendix), the households in the Village can support an additional 20,000 to 25,000 square feet of retail by 2025, and every five years after that if household growth continues as projected. Based upon where retail is located in the area, not all of this demand would likely be located within the Village limits.

Moore County, excluding Pinehurst, can support an approximate additional 90,000 to 100,000 square feet of new retail every five years.

The demand models provide square feet by retail type. We note that this demand is for an average five year period, and that the next year or two could be overly challenging for retail given the recovery needed post Covid-19.



Note: Full demand is in Appendix

Retail Market Summary

There is stable demand for new retail within the Village of Pinehurst. Demand for new retail is primarily driven by households in the area, as well as tourists. Both planning areas could be appropriate locations for locally-serving retail. Neither would be an ideal location for regional retail.

Retail occupancy is currently down due to Covid-19, but still performing relatively well compared to other similar parts of the state that are reported to be experiencing higher vacancy. Occupancy should increase after the pandemic is over.

The average rental rate has been relatively stable, and in many places the rental rates are approaching the amount needed for new construction (roughly $24 to $30/SF).

VP

Village Place is adjacent to the Village Center. There is also a collection of small retail along Rattlesnake Trail. This area could be built upon. Village Place would be an appropriate location for retail including restaurants, entertainment, tourist-oriented, and locally serving retail. Larger format retail might prefer to be along NC 211, while smaller retail could be an extension of the Village Core, brewery, and retail along Rattlesnake Trail.

PS

Pinehurst South is adjacent to some underperforming, older retail. Within Pinehurst South there are some retail businesses including the new ABC store, bank, and framing shop. Pinehurst South would be a reasonable location for retail. The main challenge on the eastern side of NC 5 is access – retail needs good access, and the rail road crossings make that difficult. There could be some smaller retail that supports the existing businesses. The western side of NC 5 would be a good location for locally-serving retail.

Pinehurst is projected to see modest retail growth over the coming years; both Village Place and Pinehurst South could capture this growth and help create new, walkable, mixed-use neighborhoods.

Existing Conditions

The national office market has been negatively impacted by Covid-19. Office-using employment is down significantly and many companies are looking to re-negotiate leases, sublet some of their space, or consolidate into smaller spaces. It is not clear what the long-term impact of Covid-19 will be on people working from home. It is likely that more people will work from home at least part time after the pandemic, impacting the overall demand for office space. National office vacancy rates which were under 10% in early 2020, are expected to jump to 12% or higher and stay that way for a while. The Class A market has been hit worse than the Class B and C markets, likely due to lease rates and job type (essential versus non-essential).

It is harder to gauge the complete impact of Covid-19 on the local office market. Knowledgeable professionals have indicated that the market is well-occupied, and some areas have experienced a good amount of turnover.

In the Pinehurst area, many office service uses (such as accountant, real estate agent, etc.) occupy retail space. Based upon conversations with brokers as well as internet searches, we have put together the following table with average office lease rates.

Lease rates in the area for office tends to be in the $12-$18 per square foot triplet net (NNN – meaning, the tenant is responsible for paying the taxes, insurance, and common area maintenance fees). The area is a mixture of net rents and gross rents (where the landlord pays the taxes, insurance, and common area maintenance). Triple net rents are more typical for retail across the country, while gross rents are more typical for office spaces.

Pinehurst, Southern Pines & Aberdeen Area Estimated Retail Lease & Sales Rates

Location	Est. Avg. Lease Rates
Pinehurst Downtown	$12-$15/SF NNN
Southern Pines New Space	$18-$22/SF Gross
Older Office	$10-$15/SF Mixture of Gross & NNN
Turnberry Office Park	$12-$18/SF NNN, up to $22/SF
Medical Office	$12-$25/SF NNN, $300K for a lot
Trotter Hill	$100-$150K for a lot

Source: Internet searches, broker conversations

Pinehurst Village has approximately 188 businesses that could occupy office space. The largest number of businesses are in the “Other Services” category, followed by Real Estate, Rental & Leasing Offices, and Professional, Scientific and Technical Services. Based upon Moore County Tax Assessor data, there are approximately 230,000 square feet of office in the Village. In addition to these business types, there are 73 businesses in Pinehurst related to health care and social assistance, leading to the demand for medical office space. There are approximately 500,000 square feet of this type of space. This square footage likely includes the hospital.

Businesses and Employees in Pinehurst by NAICS	No. of Businesses	No. of Employees
Information	10	56
Securities, Commodity Contracts & Other Financial	16	39
Insurance Carriers & Related Activities; Funds, Trusts	7	22
Real Estate, Rental & Leasing	37	221
Professional, Scientific & Tech Services	31	315
Legal Services	6	46
Management of Companies & Enterprises	2	6
Administrative & Support & Waste Management & Remediatio	12	60
Other Services (except Public Administration)	55	314
Public Administration/Government	12	192
Total	188	1271
Health Care & Social Assistance	73	4720

Source: Esri

Local Competitive Market

Office in the Pinehurst area is located in many of the same areas as retail, but there are concentrations near the hospital, the downtowns, near US 15-501/US 1 and in business parks such as Turnberry Wood and Trotters Hill Circle. There is also some office space on NC 5 closer to US 15-501 that is more flex-space in nature.

Flex space would typically accommodate both warehouse and office space, and be a real estate product in-between industrial and office space.

Since many offices are owner-occupied (possibly as much as 60% of the market), the overall vacancy of office space is hard to determine. New space tends to take some time to lease-up, but there is not a lot of vacant space in the market.

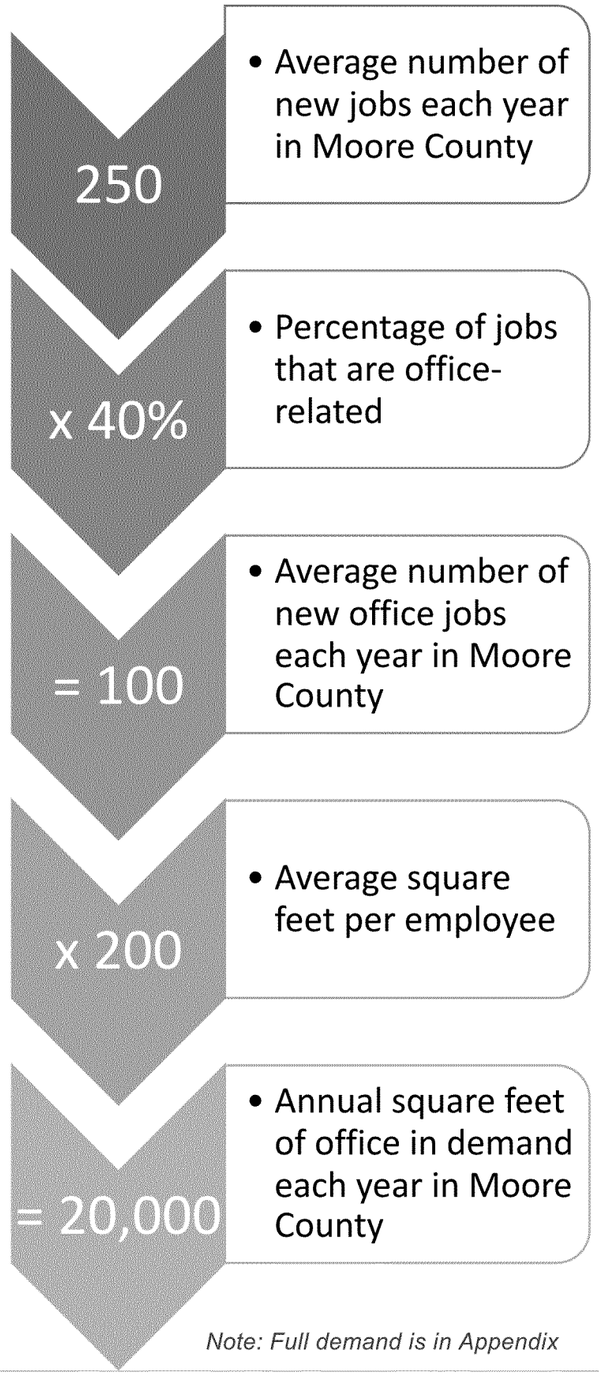


Office Projections

Duggal Real Estate Advisors completed a demand analysis for office product within the Pinehurst area based upon projected employment growth. Based upon this analysis, there could be demand for approximately 20,000 square feet of new office within Moore County per year. Pinehurst has approximately 25-30% of the employment of Moore County, and if it received the "fair share" of office square feet, there could be demand for 5,000 to 6,000 square feet of new office per year. This is likely high given the amount of space that has chosen other locations. Some of this would likely locate in retail-like space. Having the potential for the demand does not mean the demand will or should be realized – it just indicates that based upon the economics and preferences of office tenants in the area, the Village could support this office if built.

The demand model utilizes the following information. The full detailed demand model is provided in the Appendix.

- Anticipated employment growth within Moore County.
- Amount of employment growth that is likely to produce the demand for office space. For example, a new landscaping job or retail job would not increase the demand for office, but a new insurance job or dentist job would increase the demand for office.
- Square feet of office space typically occupied per office user. Before Covid-19, this number had been trending downwards based upon shared working space and open concept floor plans. At this point it is not clear how the future of office space will evolve based upon the coronavirus and people's desire and need to have more space. Given that a certain amount of workers are likely to stay home, that could counteract the need for more space per employee. Based upon this, we have used 200 square feet per employee.



Note: Full demand is in Appendix

Office Market Summary

There is limited demand for office product in the Village of Pinehurst based upon projected office-related employment growth. Both areas would be reasonable locations for office. Village Place would likely be smaller, service-oriented firms, while Pinehurst South could capture larger offices, including medical and potentially any spill-over effects from the USGA.

✓ Occupancy continues to remain high and there has been turnover within buildings. New space has been constructed and slowly leased within the area.

$ Rental rates for most tenants remains below the threshold to build new product. New office product can be built when leases reach $18-$22/SF. This is starting to happen through the Pinehurst area, so new office construction would be feasible.

V P There is very little office currently located within Village Place. The location would be appropriate for small-scale office that is locally-serving and generated such as accountants and real estate professionals. It would likely be a mix of building types up to three stories.

P S Pinehurst South has a fair amount of office. Some of it is medical office, such as dentists, and some is locally-serving such as financial planners. The location would be appropriate for both office mixed in with other uses as well as more stand-alone, larger office given land availability. It would likely be a mix of building types up to three stories.

Pinehurst is projected to see limited office growth over the coming years; both Village Place (VP) and Pinehurst South (PS) could capture this growth. In VP it would be part of a walkable, mixed-use neighborhoods. In PS it could also be more office-park like space.

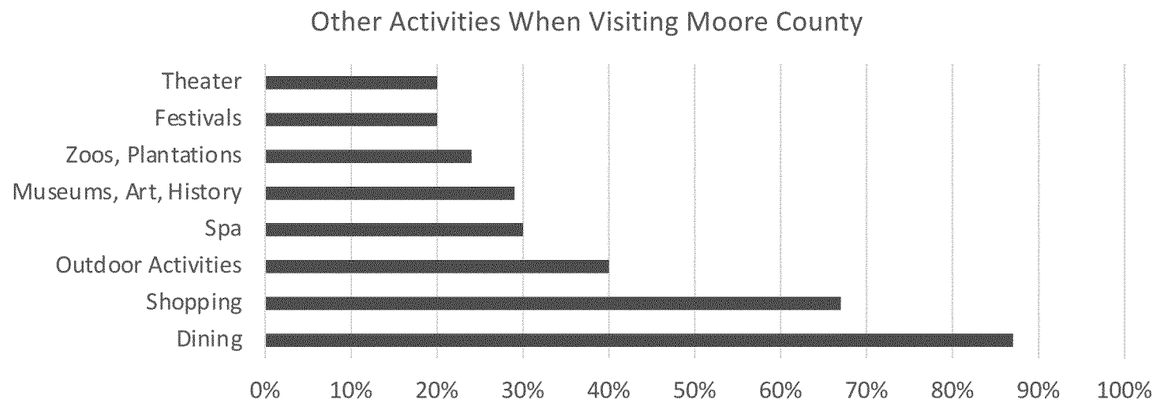
Existing Conditions

Pinehurst receives approximately 1.14 million total visitors each year. The impact of tourism on the area is strong – it provides a significant amount of jobs in the area as well as an influx of dollars. Moore County has the 11th highest tourism revenues of all the counties in North Carolina. Information about these visitors is provided in the following graphs and charts.

Moore County Visitors	
College Graduates	71%
Professional / Executive / Managerial	69%
Household Income Over $60,000	71%
Men	72%
Women	28%
Retired	16%
Median Age	43
Avg. Size of Travel Party	3.2 People
Avg. Length of Stay	4.5 Nights
Avg. Expenditure Per Person Per Visit	$385

Moore County Top 15 US Markets	
1. New York, NY	9. Atlanta, GA
2. Philadelphia, PA	10. Pittsburgh, PA
3. Washington, DC	11. Cleveland, OH
4. Charlotte, NC	12. Tampa, FL
5. Baltimore, MD	13. Hartford & New Haven, CT
6. Raleigh-Durham, NC	14. Orlando, FL
7. Chicago, IL	15. Richmond, VA
8. Boston, MA	

Moore County Visitor Golf Profile	
Play Golf 10+ Years	84%
Play Golf 3 or More Times/Month	91%
Play 24 Rounds When Traveling	92%
Married	61%
Men	83%
Women	17%



Source: Convention & Visitors Bureau, Pinehurst, Southern Pines, Aberdeen Area

Local Competitive Market

The Convention & Visitors Bureau, Pinehurst, Southern Pines, Aberdeen Area (CVB) tracks 40 existing and one under construction property in Moore County. There are approximately 3,000 hotel rooms in the entire county. We focused on the properties that are closer to Pinehurst in the Pinehurst, Southern Pines, and Aberdeen areas. These areas have approximately 1,800 hotel rooms, and of these approximately 604 are in Pinehurst.

A large number of the hotel rooms in Pinehurst are located within the Pinehurst Resort with The Carolina Hotel & Villas (334 rooms), Holly Inn (82 rooms), and the recently renovated Manor Inn (42 rooms).

In addition to formal hotel rooms, there are also a collection of Air B&B and VRBO rooms in the area. According to the CVB, there has been a large growth in these, and there are approximately 150-200 in Pinehurst.



Local Competitive Market Cont.

According to data from Smith Travel Research (STR), a national hotel data provider, occupancy is down in the area as of year-to-date November 2020 compared to 2019. In 2019, the overall occupancy for the year through November was 65% in Moore County compared to 47% in 2020. This is not surprising given the situation with the coronavirus. At the same time, the Average Daily Rate (ADR, a measure of revenue per occupied room) is down only slightly from $137 in 2019 to $130 in 2020. RevPAR (revenue per available room, a measure of occupancy and ADR) is also down from $89 in 2019 to $61 in 2020.

Given how well the area was doing pre-pandemic, and how relatively well the area has done during the pandemic, there is every reason to suspect that the hospitality market will rebound to where it was before the pandemic. In fact, due to the resurgence of golf and increased leisure business, once the group business returns, the Pinehurst area is well-positioned to continue to perform strongly in hospitality.

As shown below, 2019 was a very good year for the area in terms of hospitality, and all of the metrics had been trending up before Covid-19.

Pinehurst, Southern Pines & Aberdeen Area	2017 (Ja-No)	2018 (Ja-No)	2019 (Ja-No)	2020 (Ja-No)
Occupancy	58.7%	62.5%	65.1%	46.7%
ADR	$127	$129	$139	$131
RevPAR	$74	$81	$90	$61

Source: STR

Guests in Pinehurst before the pandemic were a mixture of golf leisure outings (accounting for roughly half of the guests) and groups. During the pandemic, the leisure business has increased while the group business has died off. Since most of the hotel stock in Pinehurst is resort and/or golf-related, it likely has a higher percentage of both of these groups than hotels along US 15-501 which also report getting business travel (such as Duke Energy, military, and rail road business).

Hospitality Projections

Duggal Real Estate Advisors completed a demand analysis for hotel rooms within Pinehurst based upon past hotel room growth and growth in tourism expenditures.

Based upon this analysis, there could be demand for approximately 25 new hotel rooms within the Pinehurst, Aberdeen, and Southern Pines area per year. Having the potential for the demand does not mean the demand will or should be realized – it just indicates that based upon the likely increase in travelers, the area could support more hotel rooms in the future. Pinehurst would be a good location for new hotel rooms.

The demand utilizes the following information. Additional information for the demand is provided in the Appendix.

- Supply of hotel rooms has grown by approximately 1.4% every year, although a new hotel is not built every year. The demand grows until a new hotel is built.
- The economic impact of domestic travel in Moore County continues to grow. The employment changed 2.4% between 2017 and 2018.
- Moore County CVB projects all visitors (overnight, daytrips, and those visiting friends) to increase by 2% to 4% per year.

Hospitality Market Summary

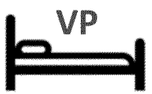
There is stable demand for hospitality product in the Village of Pinehurst, capturing leisure, group, medical, and to a lesser degree, business travelers. Both planning areas could be appropriate locations for a hotel, but Village Place is likely more desirable given its walkability to the Village Center.



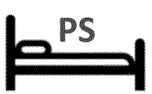
Occupancy is currently down due to Covid-19. After the pandemic, the market is likely to fully rebound to previous occupancy levels (65%).



The Average Daily Rate has remained strong despite Covid-19 at $131 for 2020. The RevPAR, which also takes into account occupancy, is down to $61 for 2020, but should return to pre-covid levels ($90 in 2019).



The Manor is located within Village Place. It has 42 rooms, and was recently renovated. It is a higher-end hotel in the area. Village Place would be a good location for additional hotel rooms. It is close to downtown, NC 211, and could appeal to golf, medical, and business travelers. The type could be bed and breakfast, boutique, or limited service hotel.



There are no hotels currently in or near Pinehurst South. The majority of hotels in the area are concentrated either close to Pinehurst Center or along the major highways including US 15-501 and US 1. Currently, Village Place would be a more attractive location for a hotel than Pinehurst South given its location close to the Village Center. This hotel type would depend upon place creation. As is, it would most likely be a limited service hotel.

Pinehurst is projected to see modest hospitality growth over the coming years; both Village Place and Pinehurst South could capture this growth and help create new, walkable, mixed-use neighborhoods.

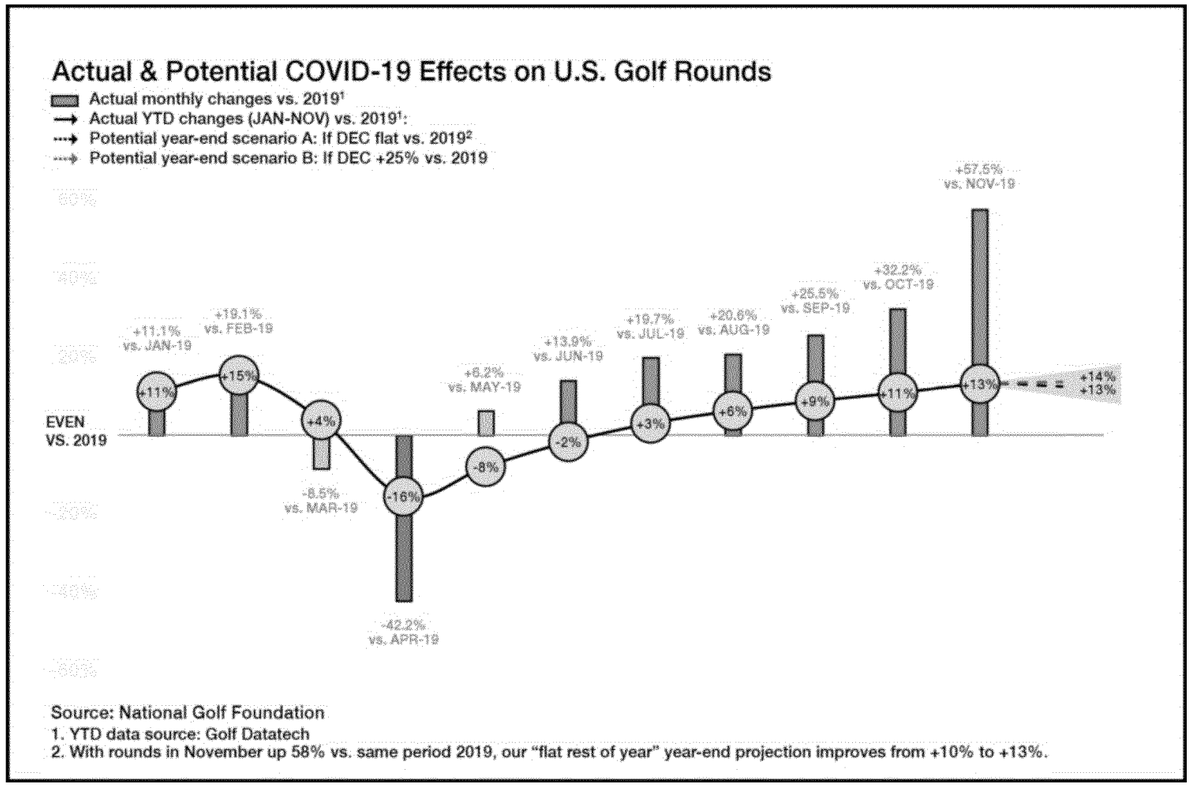
Existing Conditions

Golf has been holding steady in terms of participation over the last few years, and is anticipated to have a positive impact from Covid-19. After a drop in rounds in March and April of 2020, golf has seen an increase in the number of rounds played compared to last year. More people have been golfing due to Covid-19 restrictions in other areas of life and changes in work habits. The National Golf Foundation reported that golf rounds were up 57% in November 2020 compared to November 2019.

Another large trend is the "off-course" participation in TopGolf, Drive Shack, indoor simulators, and similar.



Source: National Golf Foundation



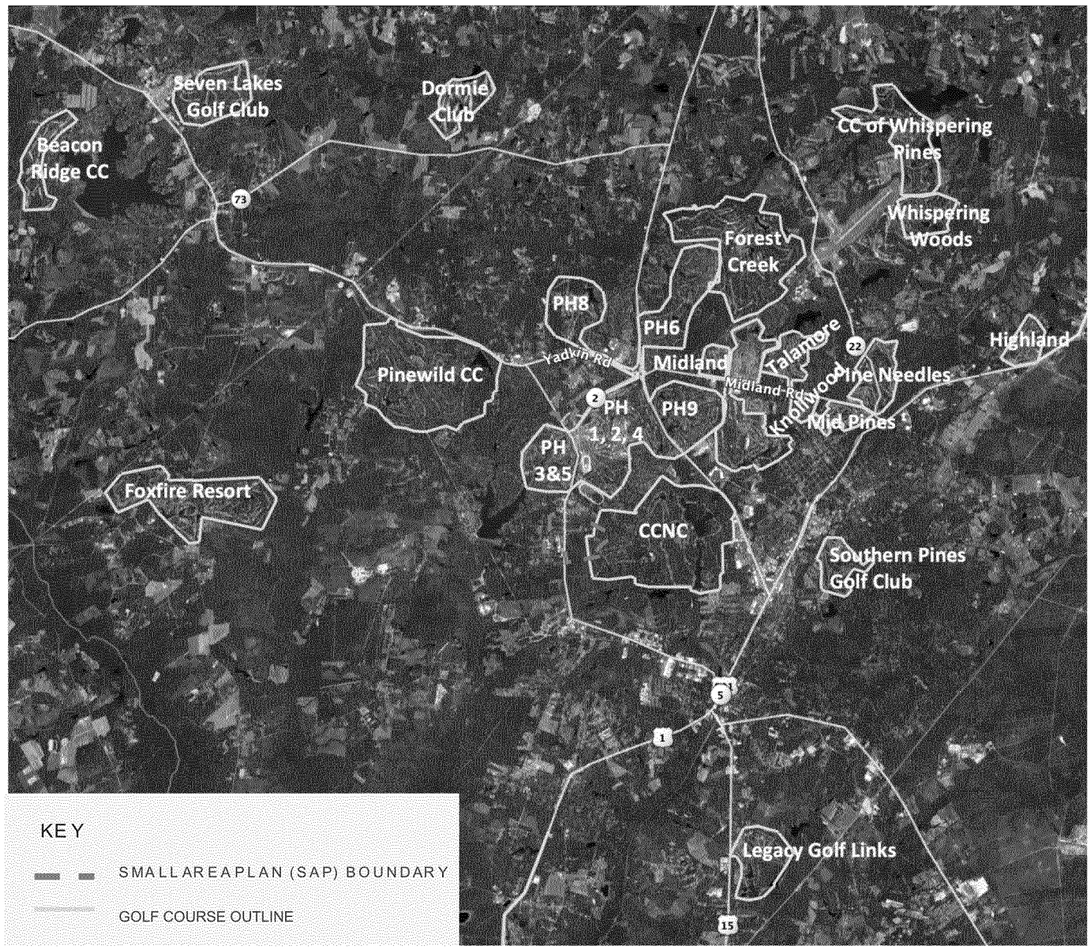
Source: National Golf Foundation

Local Competitive Market

The Convention & Visitors Bureau, Pinehurst, Southern Pines, Aberdeen Area (CVB) tracks golf courses in the area. There are 43 golf courses with a total of 769 holes in Moore County, and 243 (32%) are located within the Village of Pinehurst. The next largest number of holes are located in Southern Pines (108) followed by Midland/Morgantown Roads (94).

Golf courses in the area are reported to be doing very well. As nationally, the number of rounds played is up as well as the number of members.

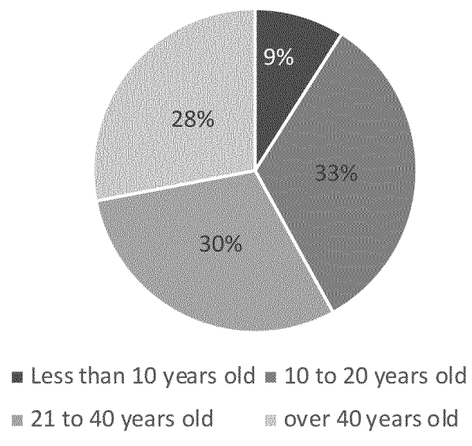
For courses that offer a membership, they range from approximately $20,000 to $50,000 initiation fee and annual dues range from $5,000 to $10,000 per year. There are a wide variety of courses, and therefore membership levels available in the area. Additional information on courses in included in the Appendix.



Local Competitive Market Cont.

Four courses have been built in the last 10 years within Moore County. Most of the courses are significantly older.

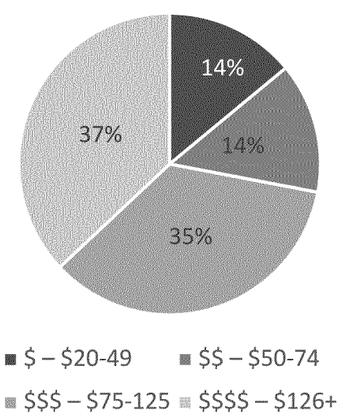
Age of Golf Courses



Of the 769 holes, most are semi-private (62%), followed by public (18%), private (14%), and resort (6%).

Most of the courses are priced over $126 per round.

Price of Golf Round



Source: Convention & Visitors Bureau, Pinehurst, Southern Pines, Aberdeen Area

Golf Projections

Duggal Real Estate Advisors completed a basic demand analysis for golf within Moore County based upon golf participation, rounds of golf per golfer, population growth, and growth in tourism.

Unlike most of the land uses, demand for golf has been limited in the last 10-15 years as golf participation in the US had been decreasing or remaining steady. 2019 was the first year in 14 years that there had been an increase in the number of golfers in the US. Golf participation dropped from 29.8 million in 2006 to 24.3 million in 2019. As discussed previously, the trend appears to be heading up again, in part due to Covid-19.

To keep the demand relatively conservative, current participation rates and rounds of golf per were used in the demand. We also assumed that the golf market was currently more or less at equilibrium to determine the number of rounds of golf per course. We further assumed that the number of tourists would increase. Based upon this demand and the assumptions included, Moore County could support two to three new golf courses in the next 10 years. Pinehurst would be an appropriate location for new courses if land were available.

The demand model is included in the Appendix.

Golf Market Summary

There is stable demand for golf in and around Pinehurst, capturing tourist and member rounds. Neither planning area would be appropriate for a new golf course given the amount of acreage needed. Pinehurst South could be a location for golf-support activities.

Participation is currently up in the US for the first time in many years. Pinehurst has also seen an increase in the amount of golfers and rounds played this year.

According to the National Golf Foundation, the average round in the US costs $61 in 2020. Pinehurst has rates far above the national average for golf.

Village Place cannot accommodate a new golf course. Given the nature of the other land uses, this is not as good of a location for other golf uses that might be appropriate in Pinehurst South.

Pinehurst South cannot accommodate a new golf course. It could be an appropriate location for golf operations facilities.

Pinehurst and the surrounding area are projected to see modest golf growth in the coming years; neither Village Place nor Pinehurst South could support a golf course. Pinehurst South could be a viable location of golf-support activities (maintenance, back of house, etc.).

APPENDIX

MARKET ANALYSIS

APPENDIX

Additional Economic Data

Employment Projections by Industry

Area Name	Industry Code	Industry Title	2017	2026	Net Growth	Annualized	Average Weekly Salary
Pinehurst-Rockingham	000670	Self Employed and Unpaid Family Workers, All Jobs	3,955	4,070	115	0.3%	*
Pinehurst-Rockingham	110000	Agriculture, Forestry, Fishing and Hunting	540	522	-18	-0.4%	$631
Pinehurst-Rockingham	210000	Mining	146	115	-31	-2.6%	$1,178
Pinehurst-Rockingham	220000	Utilities	263	263	0	0.0%	$1,765
Pinehurst-Rockingham	**230000**	**Construction**	**2,502**	**2,923**	**421**	**1.7%**	**$883**
Pinehurst-Rockingham	**310000**	**Manufacturing**	**7,998**	**8,283**	**285**	**0.4%**	**$753**
Pinehurst-Rockingham	420000	Wholesale Trade	793	822	29	0.4%	$947
Pinehurst-Rockingham	**440000**	**Retail Trade**	**7,441**	**7,922**	**481**	**0.7%**	**$480**
Pinehurst-Rockingham	480000	Transportation and Warehousing	1,207	1,150	-57	-0.5%	$902
Pinehurst-Rockingham	510000	Information	400	410	10	0.3%	$1,090
Pinehurst-Rockingham	520000	Finance and Insurance	1,033	986	-47	-0.5%	$1,102
Pinehurst-Rockingham	530000	Real Estate and Rental and Leasing	574	630	56	1.0%	$763
Pinehurst-Rockingham	540000	Professional, Scientific, and Technical Services	*	*	*	1.3%	$1,099
Pinehurst-Rockingham	550000	Management of Companies and Enterprises	R	*	*	0.6%	$1,210
Pinehurst-Rockingham	560000	Administrative and Support and Waste Management and Remediation Servic	2,389	2,385	-4	0.0%	$615
Pinehurst-Rockingham	610000	Educational Services	5,250	5,247	-3	0.0%	$712
Pinehurst-Rockingham	**620000**	**Health Care and Social Assistance**	**11,806**	**13,407**	**1,601**	**1.4%**	**$937**
Pinehurst-Rockingham	710000	Arts, Entertainment, and Recreation	1,260	1,245	-15	-0.1%	$394
Pinehurst-Rockingham	**720000**	**Accommodation and Food Services**	**6,971**	**7,465**	**494**	**0.8%**	**$322**
Pinehurst-Rockingham	810000	Other Services (except Government)	2,367	2,527	160	0.7%	$600
Pinehurst-Rockingham	900000	Government	3,905	3,971	66	0.2%	*
			60,800	**64,343**	**3,543**	**0.6%**	

Employment Projections by Occupation

Area Name	SOC	Occupation Title	2017	2026	Net Growth	Annualized	2018 Median Income
Pinehurst-Rockingham	00-0000	Total, All Occupations	62,694	66,442	3,748	0.6%	$30,162
Pinehurst-Rockingham	11-0000	Management Occupations	2,890	2,952	62	0.2%	$90,358
Pinehurst-Rockingham	13-0000	Business and Financial Operations Occupations	1,607	1,720	113	0.8%	$60,067
Pinehurst-Rockingham	15-0000	Computer and Mathematical Occupations	595	668	73	1.3%	$57,943
Pinehurst-Rockingham	17-0000	Architecture and Engineering Occupations	452	481	29	0.7%	$69,381
Pinehurst-Rockingham	19-0000	Life, Physical, and Social Science Occupations	272	295	23	0.9%	$52,930
Pinehurst-Rockingham	21-0000	Community and Social Service Occupations	1,216	1,367	151	1.3%	$41,671
Pinehurst-Rockingham	23-0000	Legal Occupations	191	210	19	1.1%	$49,835
Pinehurst-Rockingham	25-0000	Education, Training, and Library Occupations	3,896	4,047	151	0.4%	$39,297
Pinehurst-Rockingham	27-0000	Arts, Design, Entertainment, Sports, and Media Occupations	625	655	30	0.5%	$33,491
Pinehurst-Rockingham	**29-0000**	**Healthcare Practitioners and Technical Occupations**	**4,800**	**5,339**	**539**	**1.2%**	**$58,325**
Pinehurst-Rockingham	**31-0000**	**Healthcare Support Occupations**	**3,305**	**3,747**	**442**	**1.4%**	**$27,102**
Pinehurst-Rockingham	33-0000	Protective Service Occupations	1,429	1,426	-3	0.0%	$34,627
Pinehurst-Rockingham	**35-0000**	**Food Preparation and Serving Related Occupations**	**5,987**	**6,477**	**490**	**0.9%**	**$19,427**
Pinehurst-Rockingham	37-0000	Building and Grounds Cleaning and Maintenance Occupations	2,648	2,810	162	0.7%	$20,956
Pinehurst-Rockingham	**39-0000**	**Personal Care and Service Occupations**	**2,448**	**2,772**	**324**	**1.4%**	**$21,003**
Pinehurst-Rockingham	**41-0000**	**Sales and Related Occupations**	**7,160**	**7,410**	**250**	**0.4%**	**$21,954**
Pinehurst-Rockingham	43-0000	Office and Administrative Support Occupations	7,772	7,885	113	0.2%	$31,118
Pinehurst-Rockingham	45-0000	Farming, Fishing, and Forestry Occupations	426	419	-7	-0.2%	$31,865
Pinehurst-Rockingham	**47-0000**	**Construction and Extraction Occupations**	**2,419**	**2,708**	**289**	**1.3%**	**$37,095**
Pinehurst-Rockingham	**49-0000**	**Installation, Maintenance, and Repair Occupations**	**2,841**	**3,081**	**240**	**0.9%**	**$42,644**
Pinehurst-Rockingham	51-0000	Production Occupations	5,898	5,985	87	0.2%	$27,887
Pinehurst-Rockingham	53-0000	Transportation and Material Moving Occupations	3,817	3,988	171	0.5%	$26,182

Source: North Carolina Department of Commerce, Labor & Economic Analysis

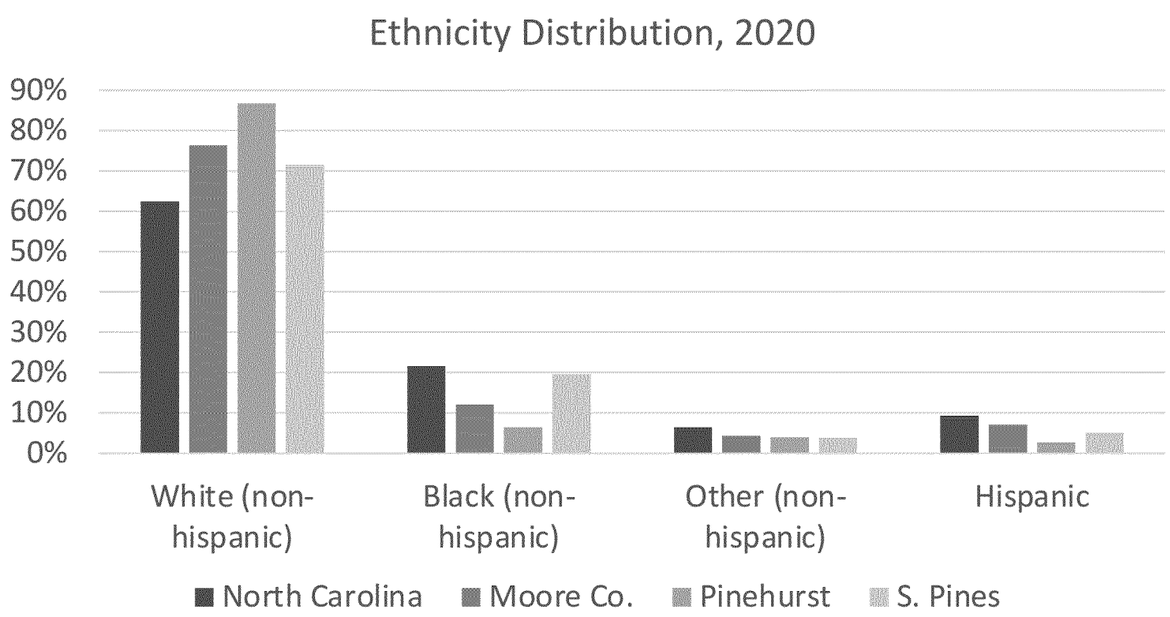
Pinehurst, NC

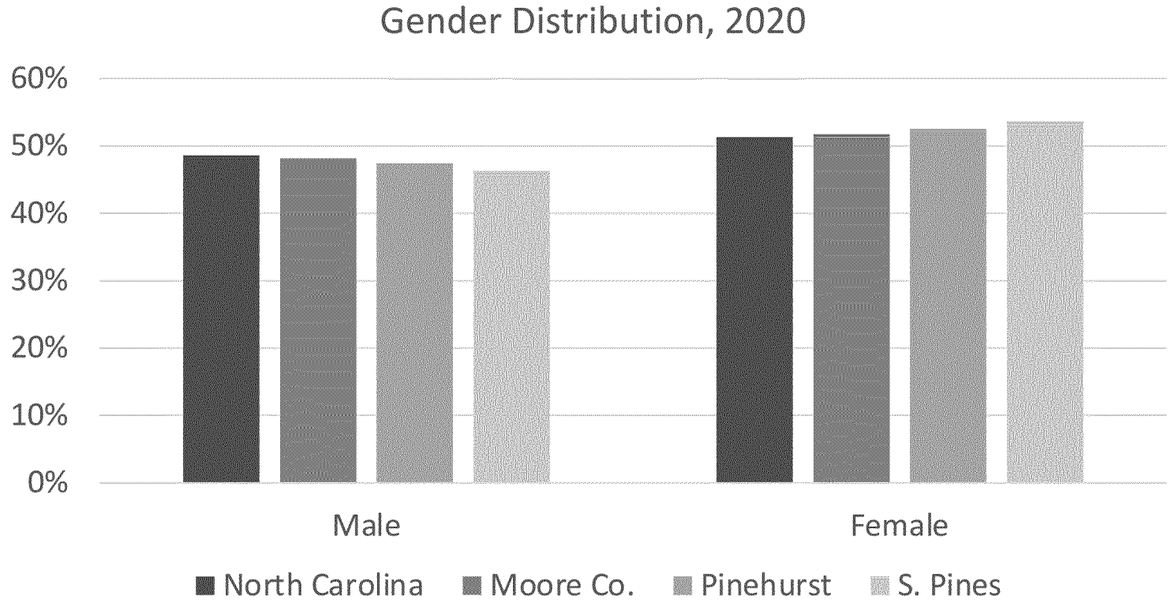
Total Businesses by Establishment Type	Businesses	Percent	Employees	Percent2
Health and Medical Services	306	38.6%	1,659	15.2%
Banks and Financial Institutions	52	6.6%	154	1.4%
Unclassified Establishments	51	6.4%	76	0.7%
Social Services	32	4.0%	85	0.8%
Real Estate	30	3.8%	179	1.6%
Specialty Stores	26	3.3%	101	0.9%
Restaurants	25	3.2%	471	4.3%
Beauty and Barber Shops	20	2.5%	192	1.8%
Membership Organizations	19	2.4%	117	1.1%
Professional Services	17	2.2%	203	1.9%
Entertainment and Recreation Services	16	2.0%	237	2.2%
Hospitals	16	2.0%	3,684	33.8%
Heavy Construction	15	1.9%	62	0.6%
Other Business Services	13	1.6%	43	0.4%
Legal Services	13	1.6%	47	0.4%
General Construction	11	1.4%	48	0.4%
Hotels and Lodging	10	1.3%	2,424	22.2%
Clothing Stores	9	1.1%	24	0.2%
Government	9	1.1%	182	1.7%
Agricultural Services	7	0.9%	28	0.3%
Transportation	7	0.9%	36	0.3%
Auto Dealers and Gas Stations	7	0.9%	126	1.2%
Other Personal Service	7	0.9%	19	0.2%
Other Food Service	6	0.8%	58	0.5%
Insurance Agents and Brokers	6	0.8%	15	0.1%
Computer Services	5	0.6%	26	0.2%
Communications	4	0.5%	16	0.2%
Auto Repair/Services	4	0.5%	8	0.1%
Machinery and Equipment Manufacturing	3	0.4%	10	0.1%
Home Furnishings	3	0.4%	7	0.1%
Bars	3	0.4%	32	0.3%
Dry Cleaning and Laundry	3	0.4%	12	0.1%
Motion Pictures	3	0.4%	10	0.1%
Printing and Publishing	2	0.3%	8	0.1%
Travel Services	2	0.3%	7	0.1%
Durables Wholesale	2	0.3%	9	0.1%
Non Durables Wholesale	2	0.3%	17	0.2%
Building Materials, Hardware and Garden	2	0.3%	30	0.3%
General Merchandise Stores	2	0.3%	19	0.2%
Food Markets	2	0.3%	109	1.0%
Convenience Stores	2	0.3%	9	0.1%
Drug Stores	2	0.3%	17	0.2%
Liquor Stores	2	0.3%	9	0.1%
Oil and Gas	1	0.1%	2	0.0%
Food Manufacturing	1	0.1%	7	0.1%
Textile Mills	1	0.1%	54	0.5%
Paper Manufacturing	1	0.1%	27	0.3%
Other Food Stores	1	0.1%	3	0.0%
Furniture Stores	1	0.1%	4	0.0%
Electronics and Computer Stores	1	0.1%	1	0.0%
Catalog and Direct Sales	1	0.1%	1	0.0%
Miscellaneous Repair Services	1	0.1%	1	0.0%
Primary and Secondary Education	1	0.1%	128	1.2%
Child Care Services	1	0.1%	13	0.1%
Museums and Zoos	1	0.1%	6	0.1%
Colleges and Universities	0	0.0%	15	0.1%

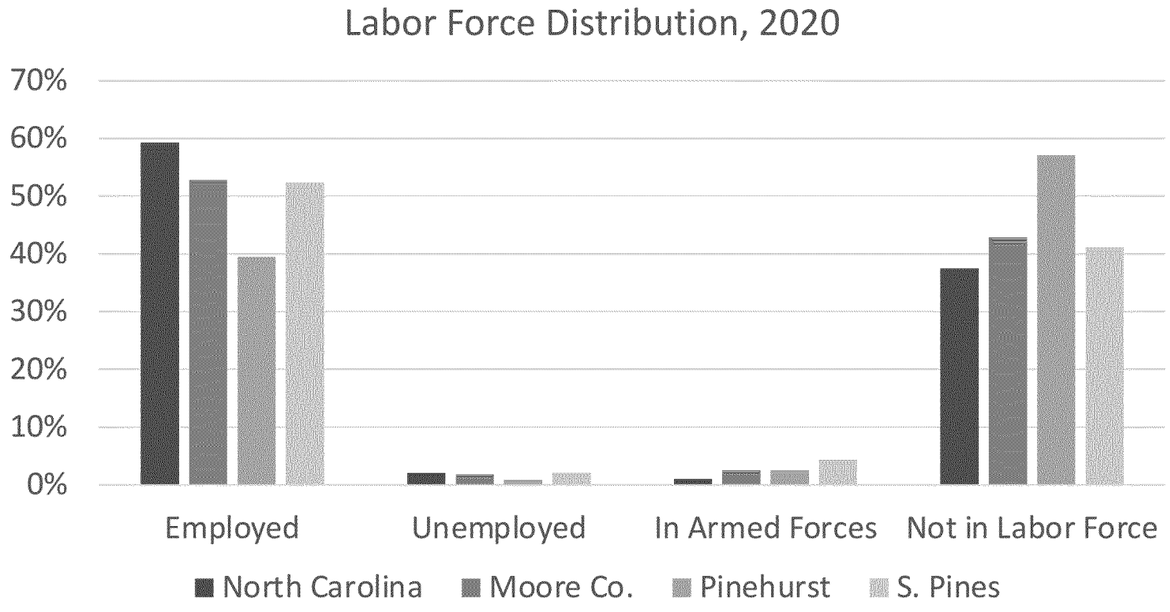
Additional Demographic Data

Total Population							
County	July 2010	July 2015	July 2020	July 2025	July 2030	July 2035	July 2039
Moore	88,587	94,159	102,950	111,534	119,674	127,398	133,292
North Carolina	9,574,293	10,033,079	10,630,691	11,233,133	11,836,070	12,439,269	12,919,921
Moore Co. as a % of NC	0.9%	0.9%	1.0%	1.0%	1.0%	1.0%	1.0%

Source: North Carolina OSBM, Standard Population Estimates, Vintage 2018 and Population Projections, Vintage 2019

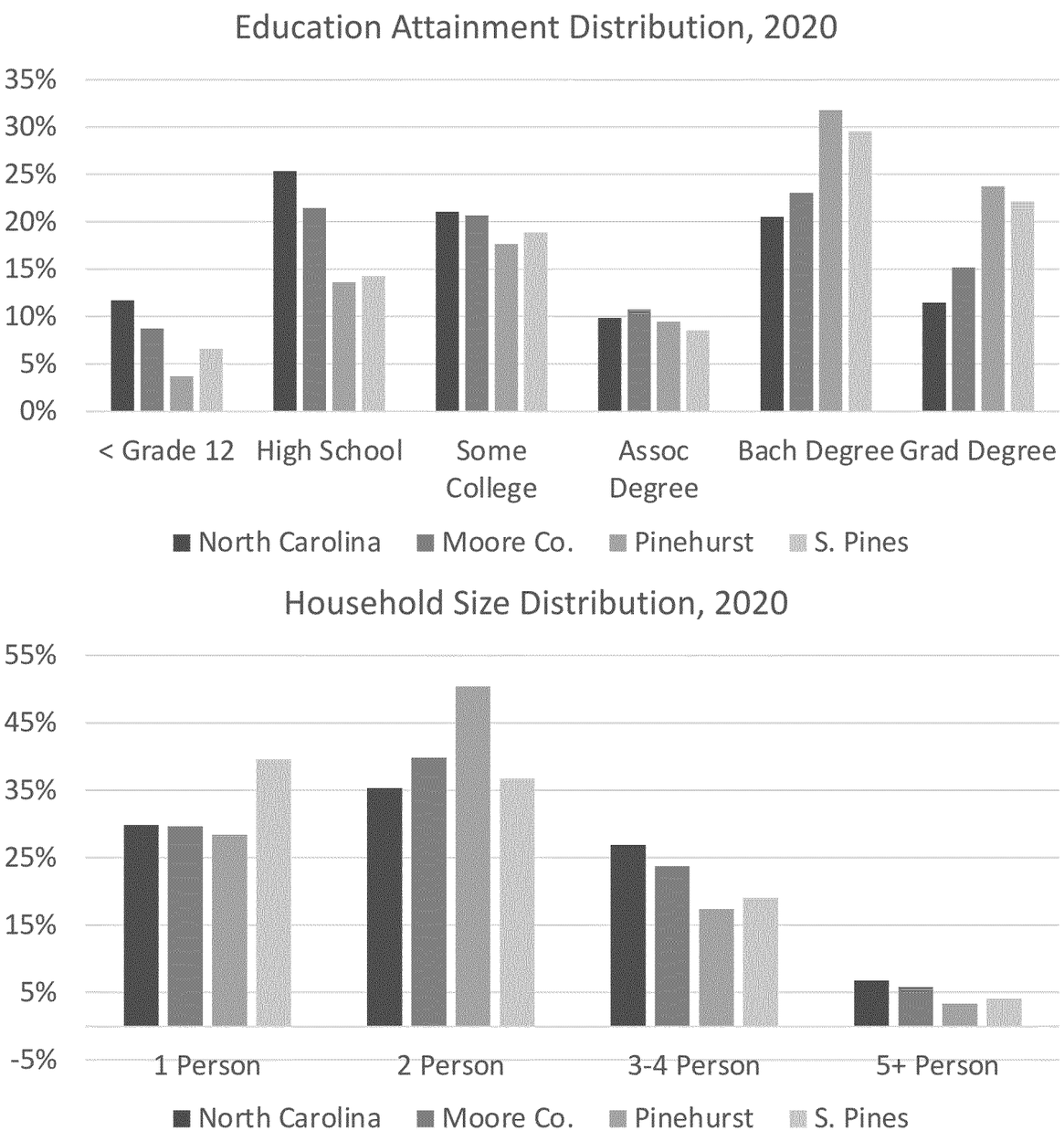






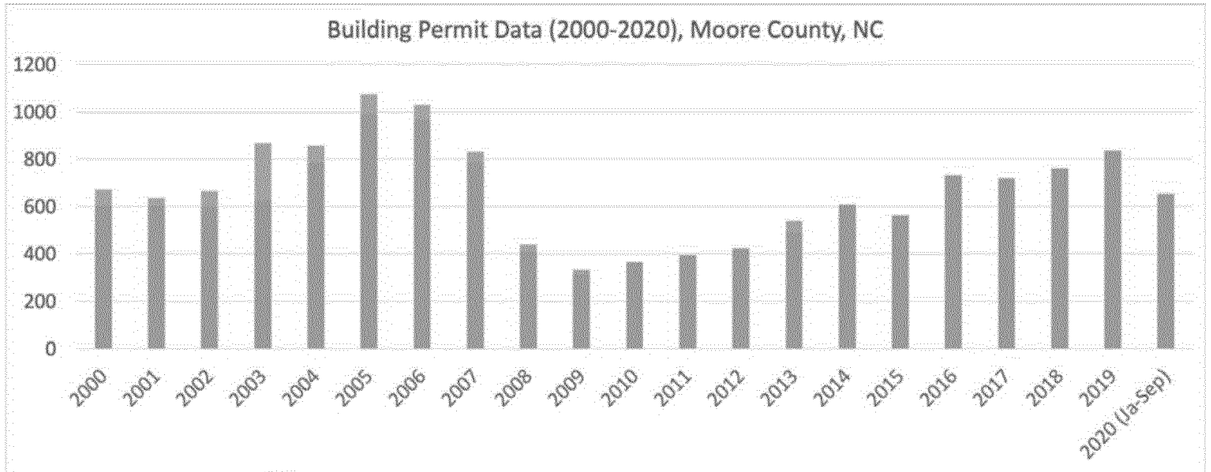
Source: AccessNC, North Carolina Department of Commerce, Labor and Economic Analysis

Additional Demographic Data

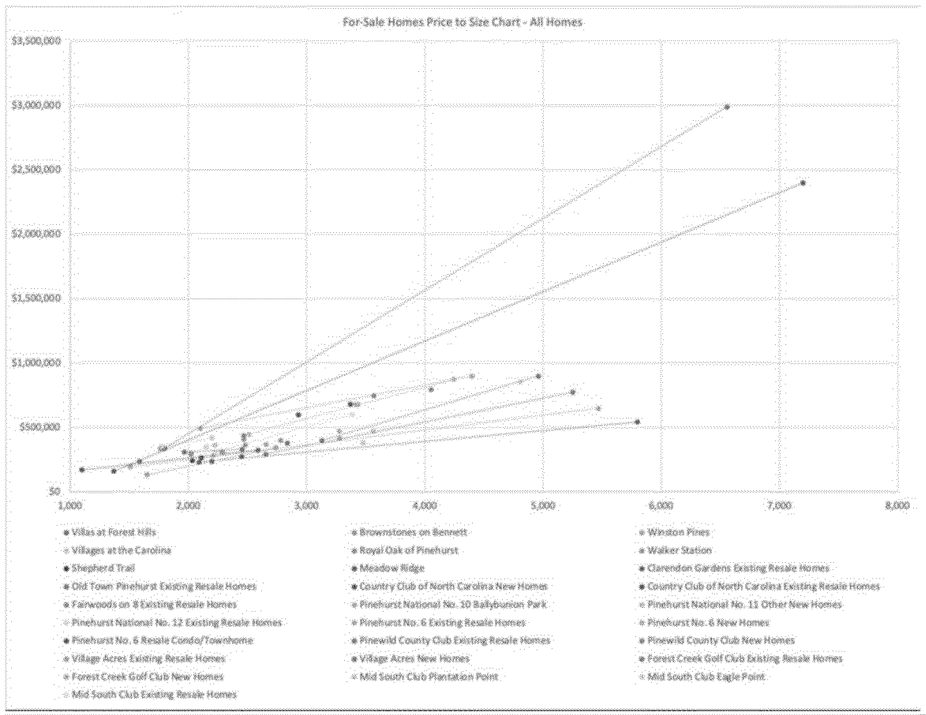


Source: AccessNC, North Carolina Department of Commerce, Labor and Economic Analysis

Additional For-Sale Data



Source: SOCDS database



Source: Duggal Real Estate Advisors

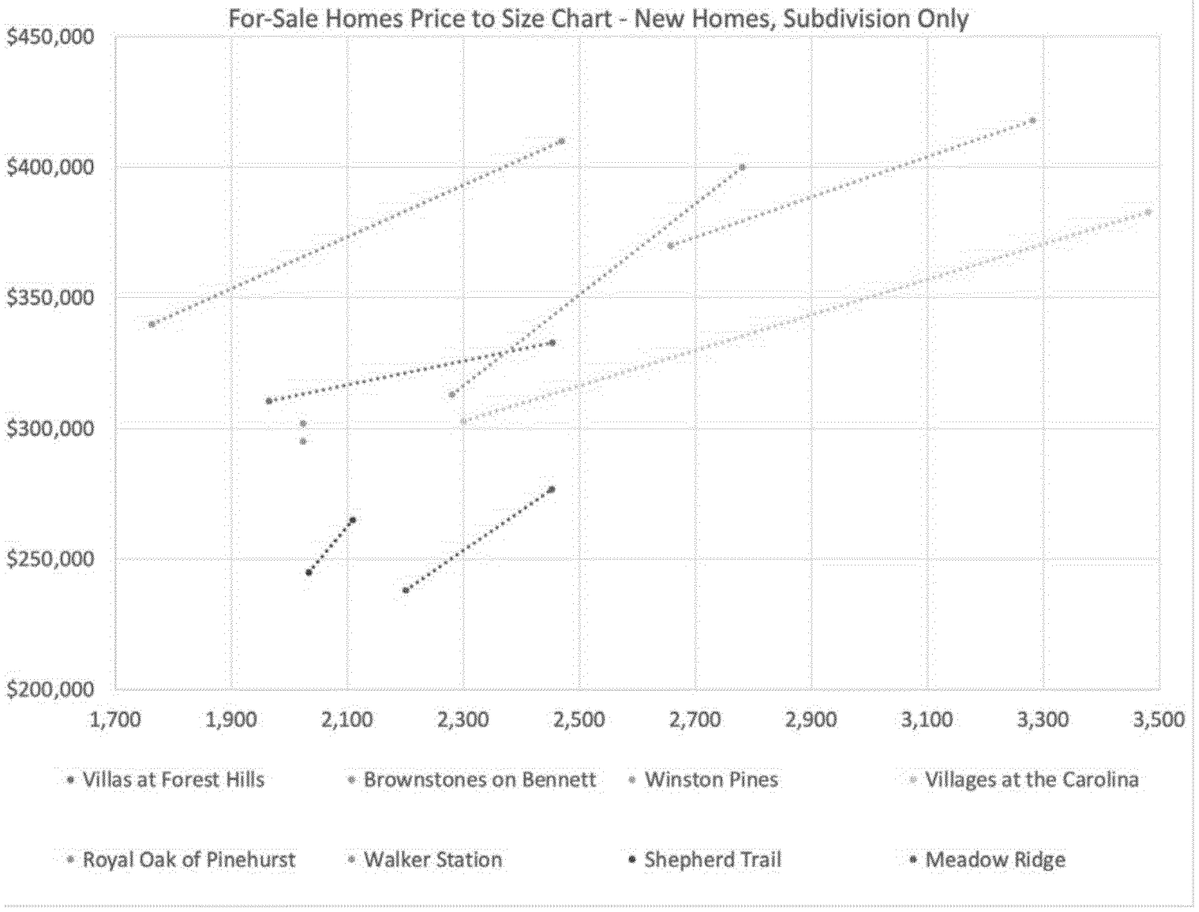
ESTIMATED ANNUAL FOR-SALE DEMAND POTENTIAL
DEMOGRAPHIC TRENDS AND PROJECTIONS: PINEHURST, NC
2020-2025

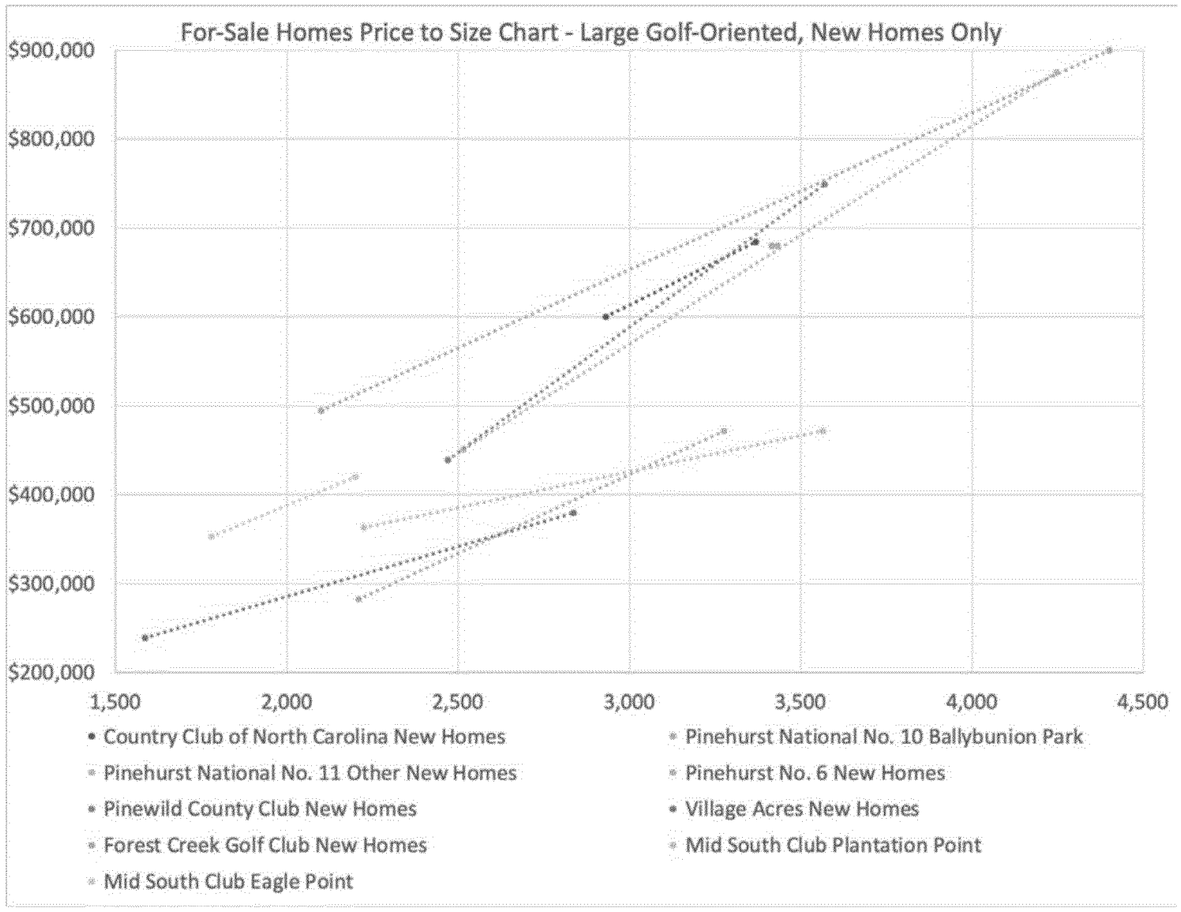
Income: / Home Price [2]:	Below $25,000 Below $90,000	$25,000 $50,000 $90,000 $180,000	$50,000 $75,000 $180,000 $265,000	$75,000 $100,000 $265,000 $350,000	$100,000 $150,000 $350,000 $525,000	$100,000 And Above $525,000 And Above	Total
New Household Growth, 2020-2025							
Total Annual New Households in Pinehurst Village	43	43	43	43	43	43	43
x Distribution of Income [3]	8%	20%	18%	16%	20%	18%	100%
= Income Qualified	4	9	8	7	9	8	43
x OwnerPropensity [3]	90%	83%	86%	84%	87%	86%	85%
=New Households Seeking For-Sale Units	3	7	6	6	7	7	37
Existing Owner Household Annual Turnover							
Total Households in Pinehurst Village [1]	7,885	7,885	7,885	7,885	7,885	7,885	7,885
x Distribution of Income [3]	8%	20%	18%	16%	20%	18%	100.0%
x Owner Propensity [3]	90%	83%	86%	84%	87%	86%	85%
Total Owner Households	577	1,338	1,189	1,033	1,363	1,240	6,742
x Annual Turnover Rate [4]	8.4%	8.4%	8.4%	8.4%	8.4%	8.4%	8.4%
=Demand From Existing Households in Turnover	48	112	100	87	115	104	566
Total Annual For-Sale Demand By Price Range	52	120	106	92	122	111	603
x Preference for/Ability to Deliver New [4]	0%	5%	15%	20%	20%	20%	14%
= Annual Demand for New Homes from Residents	0	6	16	18	24	22	87
x Estimate of Sales that are Second Homes [3]	0%	0%	11%	12%	12%	12%	12%
= Annual Demand for New Second Homes	0	0	2	3	3	3	11
Total Annual For-Sale Demand for New Homes	**0**	**6**	**18**	**21**	**28**	**25**	**98**

[1] AccessNC, North Carolina Department of Commerce, Labor and Economic Analysis for 2020-2025
[2] Based on bankrate.com mortgage calculator, utilizing a 30 year fixed loan with a 4.5% interest rate.
[3] American Community Survey, 2018, 5 year estimates for Pinehurst Village, NC. Table S0701 and B25118.
[4] Based on new home sales as a percentage of total home sales in Pinehurst from 2018 - 2020 from Zillow.com.

SOURCE: Duggal Real Estate Advisors, American Community Survey, AccessNC, Zillow.com, Bankrate.com

Additional For-Sale Data





Source: Duggal Real Estate Advisors

For-Sale Community Data

Community/Neighborhood Name	Neighborhood/Section Name	Address	Orientation	Home Type	Developer/Builder(s)	No. Homes	Approx. Year Started	Homes Sold	Approx. Annual Sales Pace	Home Price Range	Avg. Home Price	Home Size Range	Avg. Home Size	$/SF Range	Avg. $/SF	Lot Size Range (SF)	Avg. Lot Size (SF)	Lot Price Range	Avg. Lot Price	Avg. Lot Price Per Acre	Other
Pinehurst South Cottages	Planned project	Blake Boulevard, Pinehurst, NC	Subdivision	SFD	The Cottages at Legacy Lakes	38	Planned	n/a	n/a	n/a - n/a	n/a	1,800 - 2,400	2,100	n/a - n/a	n/a	n/a - n/a	n/a	n/a - n/a	n/a	n/a	
Villas at Forest Hills	Villas at Forest Hills	130 Whistling Straight Rd, Pinehurst, NC	Subdivision	Attached Villa	McKee Homes	70	Aug-18	29	12	$310,500 - $332,792	$321,646	1,965 - 2,453	2,209	$158 - $136	$146	n/a - n/a	n/a	n/a - n/a	n/a	n/a	
Brownstones on Bennett	Brownstones on Bennett	Brownstone Lane, Southern Pines, NC	Subdivision	TH	McKee Homes	n/a	Jun-18	9	5	$340,000 - $410,000	$375,000	1,763 - 2,469	2,116	$193 - $166	$177	n/a - n/a	n/a	n/a - n/a	n/a	n/a	
Winston Pines	Winston Pines	Winston Pines Drive, Pinehurst, NC	Subdivision	SFD	Caviness & Cates Communities	27	Sep-19	15	15	$370,000 - $417,900	$389,250	2,657 - 3,281	2,969	$139 - $127	$131	21,780 - 87,120	21,780	$45,000 - $50,000	$47,500	$95,000	
Villages at the Carolina	Villages at the Carolina	515 Ave of the Carolinas, Whispering Pines,	Subdivision	SFD	HH Homes	75	Dec-17	65	22	$302,900 - $382,900	$342,900	2,300 - 3,480	2,890	$132 - $110	$119	n/a - n/a	n/a	n/a - n/a	n/a	n/a	
Royal Oak of Pinehurst	Royal Oak of Pinehurst	121 Lark Drive, Pinehurst, NC 28374	Subdivision	Attached Villa	Caviness & Cates Communities	40	Aug-20	0	n/a	$295,000 $302,000	$298,500	2,023 - 2,023	2,023	$146 - $149	$148	n/a - n/a	n/a	n/a - n/a	n/a	n/a	
Walker Station	Walker Station	65 Station Avenue, Pinehurst, NC	TND	SFD	Red/Brand	70	Dec-17	35	12	$313,000 - $400,000	$338,000	2,280 - 2,780	2,530	$137 - $144	$134	n/a - n/a	n/a	n/a - n/a	n/a	n/a	
Shepherd Trail	Shepherd Trail	Shepherd Trail & Roseland Rd, Aberdeen, N	Subdivsion	SFD	GMC Construction	50+/-	Oct-18	26	13	$245,000 - $265,000	$255,000	2,033 - 2,109	2,071	$121 - $126	$123	n/a - n/a	n/a	n/a - n/a	n/a	n/a	
Meadow Ridge	Meadow Ridge	Whitney Dr, Aberdeen, NC 28315	Subdivsion	SFD	HH Homes	100	Jan-18	100	33	$238,000 - $276,859	$257,430	2,200 - 2,452	2,326	$108 - $113	$111	n/a - n/a	n/a	n/a - n/a	n/a	n/a	
Clarendon Gardens	Existing Resale Homes	Clarendon Lane, Pinehurst, NC 28374	Subdivision	SFD	n/a	170	2000	100	6	$233,000 - $545,000	$379,786	2,089 - 5,800	3,090	$112 - $94	$123	n/a - n/a	28,750	n/a - n/a	$54,500	$82,576	Can be a member of Pinehurst Country Club
Old Town Pinehurst	Existing Resale Homes	Pinehurst, NC	Old town	SFD	n/a	n/a	n/a	n/a	35	$339,000 - $2,989,999	$518,000	1,799 - 6,556	2,831	$188 - $456	$183	12,197 - 15,682	13,939	$135,000 - $245,000	$190,000	n/a	
Country Club of North Carolina		1600 Morganton Rd, Pinehurst, NC 28374	Golf, Water, Gated		Custom Homes		1969														2 golf courses - Dogwood & Cardinal
	New Homes (East Lake & Royal Dornoch)		Lake	SFD	Huntley Design Build	40	n/a	n/a	2	$600,000 - $684,500	$397,611	2,930 - 3,369	3,150	$205 - $203	$183	13,068 - 74,052	43,560	$145,000 - $145,000	$145,000	$145,000	
	Existing Resale Homes		Varies	SFD	Custom Homes	n/a	n/a	n/a	36	$163,000 - $2,400,000	$580,000	1,368 - 7,198	3,791	$119 - $333	$153	n/a - n/a	n/a	n/a - n/a	n/a	n/a	
	Golf Lots		Golf	Lots	n/a	n/a	n/a	n/a	6	n/a - n/a	n/a	n/a - n/a	n/a	n/a - n/a	n/a	54,450 54,450	54,450	$175,000 - $315,000	$245,000	$196,000	
	Water Lots		Water	Lots	n/a	n/a	n/a	n/a	Above	n/a - n/a	n/a	n/a - n/a	n/a	n/a - n/a	n/a	10,890 - 14,375	12,632	$135,000 - $270,000	$202,500	$698,276	
	Wooded Lots		Woods	Lots	n/a	n/a	n/a	n/a	Above	n/a - n/a	n/a	n/a - n/a	n/a	n/a - n/a	n/a	236,095 261,360	248,728	$170,000 - $299,000	$234,500	$41,068	
Fairwoods on 7		14 Inverrary Rd, Pinehurst, NC 28374	Golf, Gated	SFD	Custom Homes							3,500 5,500									Frontage on Pinehurst No. 2, No. 4, and No. 7
	Existing Resale Homes		Golf	SFD	Custom Homes	n/a	n/a	n/a	20	$365,000 - $798,000	$668,000	2,481 - 4,053	3,800	$147 - $197	$176	n/a - n/a	n/a	n/a - n/a	n/a	n/a	
	Golf Lots		Golf	Lots	n/a	n/a	n/a	n/a	4	n/a - n/a	n/a	n/a - n/a	n/a	n/a - n/a	n/a	34,412 - 37,026	35,719	$82,500 - $390,000	$164,813	$200,991	
Pinehurst National No. 9		1 Royal Troon Dr, Pinehurst, NC 28374	Golf, Gated		Custom Homes																
	Ballybunion Park		Golf	SFD	Huntley Design Build	26	2017	11	3	$680,000 - $680,000	$680,000	3,415 - 3,432	3,424	$199 - $198	$199	7,405 - 12,632	7,405	$93,750 - $127,500	$116,833	$687,255	Pinehurst CC Membership included with
	Other New Homes		Varies	SFD	Homes by Dickerson	n/a	n/a	n/a	5	$450,542 - $875,000	$662,771	2,514 - 4,246	3,380	$179 - $206	$196	n/a - n/a	n/a	n/a - n/a	n/a	n/a	lot purchase ($45K value)
	Existing Resale Homes		Varies	SFD	Pinehurst Homes, Inc.	n/a	n/a	n/a	14	$350,000 - $855,000	$602,500	2,150 - 4,807	3,479	$163 - $178	$173	n/a - n/a	n/a	n/a - n/a	n/a	n/a	
	Golf Lots		Golf	Lots	n/a	n/a	n/a	n/a	12	n/a - n/a	n/a	n/a - n/a	n/a	n/a - n/a	n/a	7,840 - 8,712	14,000	$90,000 - $703,000	$255,083	$793,674	
	Wooded Lots		Woods	Lots	n/a	n/a	n/a	n/a	4	n/a - n/a	n/a	n/a - n/a	n/a	n/a - n/a	n/a	27,443 - 28,314	27,878	$60,000 - $62,500	$61,000	$95,313	
Pinehurst No. 6		97 Juniper Creek Blvd, Pinehurst, NC 28374	Golf		n/a																Can be a member of Pinehurst Country Club
	Existing Resale Homes		Varies	SFD	n/a				73	$197,500 - $650,000	$287,000	1,510 - 5,467	2,432	$131 - $119	$118	n/a - n/a	n/a	n/a - n/a	n/a	n/a	
	New Homes		Varies	SFD	Goneau Construction	n/a	n/a	n/a	18	$283,000 - $471,800	$377,400	2,210 - 3,276	2,743	$128 - $144	$136	13,068 - 13,068	13,068	$13,000 - $45,000	$31,333	$104,444	
	Resale Condo/Townhome		Varies	Attached	n/a	n/a	n/a	n/a	12	$172,000 - $325,000	$248,500	1,100 - 2,590	1,845	$156 - $125	$141	n/a - n/a	n/a	n/a - n/a	n/a	n/a	
	Golf Lots		Golf	Lots	n/a	n/a	n/a	n/a	3	n/a - n/a	n/a	n/a - n/a	n/a	n/a - n/a	n/a	12,197 - 14,375	13,286	$72,000 - $100,000	$81,333	$266,667	
	Wooded Lots		Woods	Lots	n/a	n/a	n/a	n/a	5	n/a - n/a	n/a	n/a - n/a	n/a	n/a - n/a	n/a	10,890 - 16,117	13,504	$3,500 - $38,000	$22,100	$71,290	
Pinewild County Club		4 Glasgow Dr, Pinehurst, NC 28374	Golf, Gated																		Membership not required
	Existing Resale Homes		Varies, Mainly Golf	SFD	n/a	n/a	n/a	n/a	56	$295,000 - $775,000	$535,000	2,654 - 5,250	3,952	$111 - $148	$129	n/a - n/a	n/a	n/a - n/a	n/a	n/a	
	New Homes		Varies, Mainly Golf	SFD	Kirby Construction	n/a	n/a	n/a	5	$439,000 - $749,000	$560,000	2,470 - 3,569	3,020	$178 - $210	$194	n/a - n/a	n/a	n/a - n/a	n/a	n/a	
	Golf Lots		Golf	Lots	n/a	n/a	n/a	n/a	13	n/a - n/a	n/a	n/a - n/a	n/a	n/a - n/a	n/a	30,492 - 47,480	38,986	$60,500 - $99,000	$79,750	$89,106	
	Wooded Lots		Woods	Lots	n/a	n/a	n/a	n/a	9	n/a - n/a	n/a	n/a - n/a	n/a	n/a - n/a	n/a	21,780 - 43,560	32,670	$25,000 - $40,000	$32,500	$43,333	
Village Acres		Pinehurst, NC	Golf, Mainly Non	SFD			1985														
	Existing Resale Homes		Varies	SFD	n/a	n/a	n/a	n/a	86	$134,000 - $345,000	$239,500	1,650 - 2,740	2,195	$81 - $126	$104	n/a - n/a	n/a	n/a - n/a	n/a	n/a	
	New Homes		Varies	SFD	Elite Home Builders	n/a	n/a	n/a	11	$239,000 $380,000	$309,500	1,586 2,837	2,212	$151 - $134	$142	n/a - n/a	n/a	n/a - n/a	n/a	n/a	
	Wooded Lots		Woods	Lots	n/a	n/a	n/a	n/a	3	n/a - n/a	n/a	n/a - n/a	n/a	n/a - n/a	n/a	10,888 - 14,375	12,631	$24,000 - $40,100	$32,050	$110,528	
Forest Creek Golf Club	Forest Creek Golf Club	200 Meyer Farm Drive	Golf, Gated	SFD	Huntley Design Build	750	1996														2 Tom Fazio Courses
	Existing Resale Homes		Golf	SFD		n/a	n/a	n/a	18	$400,000 - $900,000	$650,000	3,129 - 4,960	4,045	$128 - $181	$161	n/a - n/a	n/a	n/a - n/a	n/a	n/a	
	New Homes		Golf	SFD		n/a	n/a	n/a	5	$495,000 - $900,000	$652,200	2,100 - 4,400	3,250	$236 - $205	$220	n/a - n/a	n/a	n/a - n/a	n/a	n/a	
	Golf Lots		Golf	Lots		n/a	n/a	n/a	17	n/a - n/a	n/a	n/a - n/a	n/a	n/a - n/a	n/a	16,117 - 44,431	30,492	$65,000 - $300,000	$118,294	$168,992	
	Wooded Lots		Golf	Lots		n/a	n/a	n/a	5	n/a - n/a	n/a	n/a - n/a	n/a	n/a - n/a	n/a	24,394 - 40,946	39,204	$27,000 - $60,000	$43,500	$48,333	
Mid South Club		1 Palmer Drive, Southern Pines, NC																			
	Plantation Point		Golf/Wooded	SFD	McKee Homes	n/a	n/a	n/a	7	$363,285 - $472,116	$417,701	2,225 - 3,564	2,895	$163 - $132	$148	n/a - n/a	n/a	n/a - $195,000	n/a	n/a	
	Eagle Point		Golf	SFD	McKee Homes	n/a	n/a	n/a	6	$353,000 - $420,000	$386,500	1,780 - 2,200	1,990	$198 - $191	$195	n/a - n/a	n/a	n/a - n/a	n/a	n/a	
	Existing Resale Homes		Varies	SFD	n/a	n/a	n/a	n/a	15	$312,000 - $602,000	$457,000	2,226 - 3,384	2,805	$140 - $178	$159	n/a - n/a	n/a	n/a - n/a	n/a	n/a	
	Golf Lots		Golf	Lots	n/a	n/a	n/a	n/a	3	n/a - n/a	n/a	n/a - n/a	n/a	n/a - n/a	n/a	23,958 - 31,363	27,661	$92,000 - $175,000	$122,333	$192,651	
	Semi-Golf Lots		Semi-Golf	Lots	n/a	n/a	n/a	n/a	4	n/a - n/a	n/a	n/a - n/a	n/a	n/a - n/a	n/a	19,166 - 28,314	23,740	$60,000 - $85,000	$74,250	$136,239	

Source: Duggal Real Estate Advisors

Additional For-Rent Residential Data

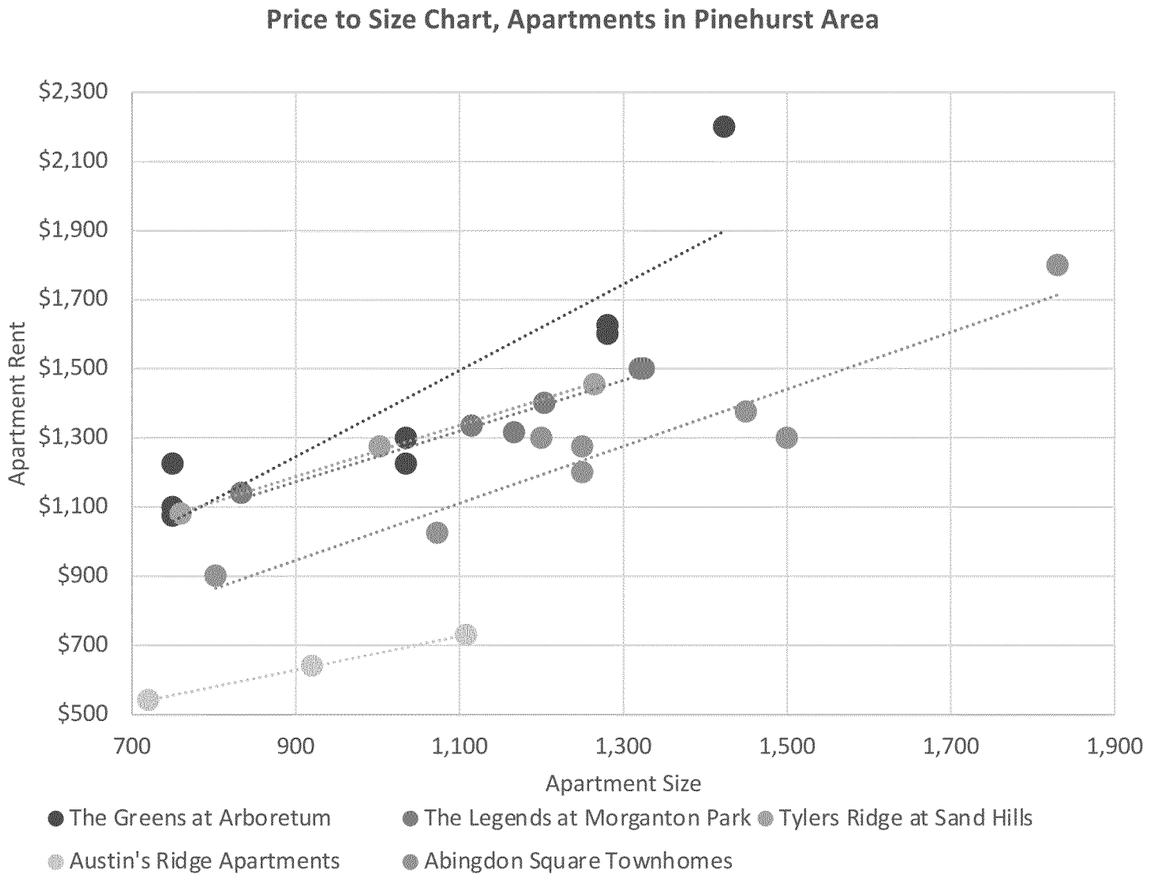
Detailed apartment data.

Apartment Name	Phone	Address	Year Built	No. Units	Available Units	Occupancy	Stories	Unit Type	Size	Base Rent	$/SF	Utilities Included	Surface Parking	Garage Parking	Garage Parking Cost	Amenities						Features		
																Elevator	Clubhouse	Pool	Fitness Cnt	Grills	Hardwood	W/D in Unit	Granite	Stainless
The Greens at Arboretum	910-621-1600	205 McCaskill Rd E, Pinehurst, NC 28374	May-18	72	2	97%	4	Average	1,038	$1,419	$1.37	None	90	25	$150	Y	Y	Y	Y	Y	Y	Y	Y	Y
			8 months to lease-up					1B/1b	750	$1,075	$1.43	Residents												
			5.5 per month first 4 months					1B/1b	750	$1,100	$1.47	pay $25												
			11 per month last 4 months					1B/1b	750	$1,225	$1.63	for trash												
								2B/2b	1,035	$1,225	$1.18													
								2B/2b	1,035	$1,300	$1.26													
								3B/2b	1,281	$1,600	$1.25													
								3B/2b	1,281	$1,625	$1.27													
								3B/2b	1,423	$2,200	$1.55													
The Legends at Morganton Park	910-600-0292	500 Legends Dr, Southern Pines, NC 28387	2015	288	8	97%	3	Average	1,161	$1,365	$1.18	Trash	1 per/unit	50	$150	N	Y	Y	Y	Y	Y	Hookup	Y	Y
								1B/1b	834	$1,140	$1.37	Cable												
								2B/2b	1,167	$1,315	$1.13													
								2B/2b	1,115	$1,335	$1.20													
								2B/2b	1,204	$1,400	$1.16													
								3B/2b	1,325	$1,500	$1.13													
								3B/2b	1,320	$1,500	$1.14													
Tylers Ridge at Sand Hills	910-947-1211	500 Moonseed Lane, Carthage, NC 28327	2013	216	0	100%	3	Average	1,009	$1,270	$1.26	None	1 per/unit	56	$95-$150	N	Y	Y	Y	Y	Y	Y	Y	Y
								1B/1b	760	$1,080	$1.42													
								2B/2b	1,003	$1,275	$1.27													
								3B/2b	1,265	$1,455	$1.15													
Austin's Ridge Apartments	910-695-0550	501 Austins Ridge Cir, Southern Pines, NC 28387	2013	52	0	100%	2	Average	916	$637	$0.70	Trash	Available	No	n/a	N	N	N	N	N	N	Hookup	N	N
								1B/1b	720	$541	$0.75													
								2B/2b	920	$641	$0.70													
								3B/3b	1,108	$730	$0.66													
Abingdon Square Townhomes	844-556-4437	200 Holly Pines Dr, Pinehurst, NC 28374	1980s to 2012	40	4	90%	2	Average	1,294	$1,272	$0.98	Trash	Available	No	n/a	N	N	N	N	N	Y	Hookup	Y	N
								1B Apt	802	$900	$1.12													
								2B Apt	1,073	$1,025	$0.96													
								2B TH	1,250	$1,200	$0.96													
								2B TH garage	1,250	$1,275	$1.02													
								3B TH	1,200	$1,300	$1.08													
								3B TH garage	1,450	$1,375	$0.95													
								4B TH	1,500	$1,300	$0.87													
								4B TH	1,830	$1,800	$0.98													
Eagles Landing	n/a	US 15-501 & Voit Gilmore Lane, Southern Pines	Under	288	288	n/a	3	1, 2 and 3 B	n/a	n/a	n/a	n/a	n/a	n/a	n/a	Y	Y	Y	Y	n/a	n/a	n/a	n/a	n/a

Source: Duggal Real Estate Advisors, interviews with leasing agents, www.apartments.com

Additional For-Rent Residential Data

Price to size chart for apartment projects in area.



Source: Duggal Real Estate Advisors, www.apartments.com

Detailed rental demand.

ESTIMATED ANNUAL RENTAL DEMAND POTENTIAL
DEMOGRAPHIC TRENDS AND PROJECTIONS: PINEHURST, NC
2020-2025

Income:	Below $25,000	$25,000 $50,000	$50,000 $75,000	$75,000 $100,000	$100,000 $150,000	$150,000 And above	
% Spent on Rent [3]:	50%	35%	28%	24%	16%		
Rent [2]:	Below $1,000	$1,000 $1,500	$1,500 $1,800	$1,800 $2,000	$2,000 $2,000	$2,000 and above	
SOURCES OF DEMAND							TOTAL
New Household Growth, 2020-2025							
Total Annual New Households in Pinehurst [1]	43	43	43	43	43	43	43
x Distribution of Income [3]	8%	20%	18%	16%	20%	18%	100%
= Income Qualified	4	9	8	7	9	8	43
x Renter Propensity [3]	10%	17%	14%	16%	13%	14%	15%
=New Households Seeking Rental Units	0	2	1	1	1	1	6
Existing Renter Household Annual Turnover							
Total Households in Pinehurst Village [1]	7,885	7,885	7,885	7,885	7,885	7,885	7,885
x Distribution of Income [3]	8%	20%	18%	16%	20%	18%	100%
x Renter Propensity [3]	10%	17%	14%	16%	13%	14%	15%
Total Renter Households	65	276	193	201	198	210	1,143
x Annual Turnover Rate [3]	45%	45%	45%	45%	45%	45%	45%
=Demand From Existing Households in Turnover	29	124	87	91	89	95	515
Annual Rental Demand By Rent Range	**30**	**125**	**88**	**92**	**90**	**96**	**521**
Preference for New [4]	4%	4%	4%	4%	4%	4%	4%
Annual Rental Demand for New Apartments	1	5	4	4	4	4	21

[1] AccessNC, North Carolina Department of Commerce, Labor and Economic Analysis for 2020-2025
[2] Based on bankrate.com mortgage calculator, utilizing a 30 year fixed loan with a 4.5% interest rate.
[3] American Community Survey, 2018, 5 year estimates for Pinehurst Village, NC. Table S0701 and B25118.
[4] Based on building permit data in Moore County.

SOURCE: Duggal Real Estate Advisors, AccessNC, American Community Survey

Additional Retail Data

RETAIL DEMAND ANALYSIS
PINEHURST VILLAGE

	2020	Growth to 2025
Households within Pinehurst in 2020 and Growth to 2025 [8]	7,885	215

Industry Summary	Demand Potential [1]	Supply (Sales) [2]	Gross Retail Gap/(Surplus) [3]	Existing Number of Businesses [4]	Sales/SF Threshold [5]	Additional Supportable Square Footage by Existing HH [6]	Additional Supportable Square Footage by New HH [7]	Total Additional Supportable Square Footage	Leakage in Moore County as well? [9]
Motor Vehicle & Parts Dealers (NAICS 441)	**$70,191,270**	**$26,479,308**	**$43,711,962**	**4**		**79,461**	**3,271**	**82,732**	**Y**
Automobile Dealers (NAICS 4411)	$57,567,778	$21,964,846	$35,602,932	1	$750	47,471	1,999	49,469	Y
Other Motor Vehicle Dealers (NAICS 4412)	$5,601,306	$4,097,238	$1,504,068	2	$270	5,571	540	6,111	Y
Auto Parts, Accessories, and Tire Stores (NAICS 4413)	$7,022,186	$417,224	$6,604,962	1	$250	26,420	731	27,151	Y
Furniture & Home Furnishings Stores (NAICS 442)	**$12,985,172**	**$1,925,456**	**$11,059,716**	**3**		**47,572**	**1,460**	**49,032**	**Y**
Furniture Stores (NAICS 4421)	$7,665,583	$1,241,584	$6,423,999	1	$200	32,120	998	33,118	Y
Home Furnishings Stores (NAICS 4422)	$5,319,589	$683,872	$4,635,717	2	$300	15,452	462	15,914	N
Electronics & Appliance Stores (NAICS 443/NAICS 4431)	**$9,738,807**	**$2,397,863**	**$7,340,944**	**2**	**$500**	**14,682**	**507**	**15,189**	**N**
Bldg Materials, Garden Equip. & Supply Stores (NAICS 444)	**$24,762,681**	**$5,480,591**	**$19,282,090**	**3**		**64,274**	**2,150**	**66,423**	**Y**
Building Material and Supplies Dealers (NAICS 4441)	$23,317,941	$5,480,591	$17,837,350	3	$300	59,458	2,024	61,482	Y
Lawn and Garden Equipment and Supplies Stores (NAICS 4442)	$1,444,740	$0	$1,444,740	0	$300	4,816	125	4,941	N
Food & Beverage Stores (NAICS 445)	**$54,688,000**	**$35,472,287**	**$19,215,713**	**6**		**38,822**	**2,860**	**41,682**	**N**
Grocery Stores (NAICS 4451) [6]	$50,717,423	$35,018,360	$15,699,063	4	$500	31,398	2,642	34,040	N
Specialty Food Stores (NAICS 4452)	$1,957,199	$199,862	$1,757,337	1	$500	3,515	102	3,617	N
Beer, Wine, and Liquor Stores (NAICS 4453)	$2,013,378	$254,065	$1,759,313	1	$450	3,910	117	4,026	Y
Health & Personal Care Stores (NAICS 446/NAICS 4461)	**$22,089,945**	**$4,373,353**	**$17,716,592**	**5**	**$350**	**50,619**	**1,644**	**52,262**	**N**
Gasoline Stations (NAICS 447/NAICS 4471)	**$33,456,151**	**$9,336,612**	**$24,119,539**	**3**	**$600**	**40,199**	**1,452**	**41,651**	**Y**
Clothing and Clothing Accessories Stores (NAICS 448)	**$15,042,064**	**$5,608,123**	**$9,433,941**	**9**		**24,803**	**1,046**	**25,849**	**Y**
Clothing Stores (NAICS 4481)	$9,745,848	$3,877,872	$5,867,976	5	$330	17,782	769	18,551	Y
Shoe Stores (NAICS 4482)	$2,269,760	$841,162	$1,428,598	1	$360	3,968	164	4,133	Y
Jewelry, Luggage, and Leather Goods Stores (NAICS 4483)	$3,026,456	$889,089	$2,137,367	3	$700	3,053	113	3,166	Y
Sporting Goods, Hobby, Book, and Music Stores (NAICS 451)	**$8,444,362**	**$2,598,290**	**$5,846,072**	**2**		**23,384**	**880**	**24,264**	**Y**
Sporting Goods/Hobby/Musical Instrument Stores (NAICS 4511)	$7,193,736	$2,598,290	$4,595,446	2	$250	18,382	749	19,131	Y
Book, Periodical, and Music Stores (NAICS 4512)	$1,250,626	$0	$1,250,626	0	$250	5,003	130	5,133	N
General Merchandise Stores (NAICS 452)	**$52,232,311**	**$1,925,451**	**$50,306,860**	**2**		**143,734**	**3,886**	**147,620**	**Y**
Department Stores Excluding Leased Depts. (NAICS 4521)	$37,767,835	$0	$37,767,835	0	$350	107,908	2,810	110,718	N
Other General Merchandise Stores (NAICS 4529)	$14,464,476	$1,925,451	$12,539,025	2	$350	35,826	1,076	36,902	Y
Miscellaneous Store Retailers (NAICS 453)	**$13,990,158**	**$2,787,277**	**$11,202,881**	**14**		**40,656**	**1,337**	**41,993**	**Y**
Florists (NAICS 4531)	$487,044	$200,747	$286,297	1	$300	954	42	997	N
Office Supplies, Stationery, and Gift Stores (NAICS 4532)	$3,028,809	$797,231	$2,231,578	2	$250	8,926	316	9,242	Y
Used Merchandise Stores (NAICS 4533)	$1,613,216	$518,252	$1,094,964	2	$200	5,475	210	5,685	N
Other Miscellaneous Store Retailers (NAICS 4539)	$8,861,089	$1,271,047	$7,590,042	9	$300	25,300	769	26,069	Y
Nonstore Retailers (NAICS 454)	**$5,584,121**	**$457,886**	**$5,126,235**	**1**					
Electronic Shopping & Mail-Order Houses (NAICS 4541)	$4,071,373	$457,886	$3,613,487	1	n/a	n/a	n/a	n/a	n/a
Vending Machine Operators (NAICS 4542)	$296,351	$0	$296,351	0	n/a	n/a	n/a	n/a	n/a
Direct Selling Establishments (NAICS 4543)	$1,216,397	$0	$1,216,397	0	n/a	n/a	n/a	n/a	n/a
Food Services & Drinking Places (NAICS 722)	**$34,274,038**	**$23,011,123**	**$11,262,915**	**37**		**23,089**	**1,598**	**24,687**	**Y**
Special Food Services (NAICS 7223)	$276,675	$1,084,805	-$808,130	2	$500	-1,616	14	-1,602	N
Drinking Places - Alcoholic Beverages (NAICS 7224)	$2,587,428	$9,665,700	-$7,078,272	10	$700	-10,112	96	-10,016	N
Restaurants/Other Eating Places (NAICS 7225) [7]	$31,409,935	$12,260,618	$19,149,317	25	$550	34,817	1,487	36,304	Y
	$357,479,080	**$121,853,620**	**$235,625,460**	**91**		**591,295**	**22,090**	**613,385**	**Y**

[1] Demonstrated purchases of households within the designated area from Esri for 2020.

[2] Sales achieved within the designated area from Esri 2020.

[3] Higher sales relative to demand show the impact of outside demand sources which may be underserved and drive farther. Lower sales indiates "leakage" out of the area.

[4] Esri 2020 for Pinehurst.

[5] Bizminer Sales per Square Foot Report and emarketer.com.

[6] Gross Retail Gap (Surplus) divided by sales per square foot by category.

[7] Estimated new household growth times the expenditures by type by household divided by sales per square foot.

[8] Esri.

[9] Esri 2020 data for Moore County, NC.

RETAIL DEMAND ANALYSIS
MOORE COUNTY

	2020	Growth to 2025
Households within Moore County in 2020 and Growth to 2025 [8]	43,651	1,518

Industry Summary	Demand Potential [1]	Supply (Sales) [2]	Gross Retail Gap/(Surplus) [3]	Existing Number of Businesses [4]	Sales/SF Threshold [5]	Additional Supportable Square Footage by Existing HH [6]	Additional Supportable Square Footage by New HH [7]	Total Additional Supportable Square Footage
Motor Vehicle & Parts Dealers (NAICS 441)	**$290,710,331**	**$203,961,441**	**$86,748,890**	**56**		**153,046**	**17,229**	**170,275**
Automobile Dealers (NAICS 4411)	$238,580,945	$166,937,489	$71,643,456	28	$750	95,525	10,546	106,071
Other Motor Vehicle Dealers (NAICS 4412)	$23,444,395	$13,655,799	$9,788,596	7	$270	36,254	2,879	39,133
Auto Parts, Accessories, and Tire Stores (NAICS 4413)	$28,684,991	$23,368,153	$5,316,838	21	$250	21,267	3,804	25,071
Furniture & Home Furnishings Stores (NAICS 442)	**$51,510,667**	**$48,211,765**	**$3,298,902**	**69**		**29,118**	**7,396**	**36,514**
Furniture Stores (NAICS 4421)	$30,832,938	$19,960,075	$10,872,863	17	$200	54,364	5,111	59,475
Home Furnishings Stores (NAICS 4422)	$20,677,729	$28,251,690	-$7,573,961	52	$300	-25,247	2,285	-22,961
Electronics & Appliance Stores (NAICS 443/NAICS 4431)	**$39,298,664**	**$51,716,490**	**-$12,417,826**	**8**	**$500**	**-24,836**	**2,606**	**-22,230**
Bldg Materials, Garden Equip. & Supply Stores (NAICS 444)	**$99,633,080**	**$46,233,469**	**$53,399,611**	**44**		**177,999**	**11,010**	**189,009**
Building Material and Supplies Dealers (NAICS 4441)	$93,474,099	$36,374,542	$57,099,557	26	$300	190,332	10,330	200,662
Lawn and Garden Equipment and Supplies Stores (NAICS 4442)	$6,158,981	$9,858,927	-$3,699,946	18	$300	-12,333	681	-11,653
Food & Beverage Stores (NAICS 445)	**$229,686,553**	**$319,500,364**	**-$89,813,811**	**63**		**-178,879**	**15,289**	**-163,590**
Grocery Stores (NAICS 4451) [6]	$213,326,676	$282,780,279	-$69,453,603	44	$500	-138,907	14,145	-124,762
Specialty Food Stores (NAICS 4452)	$8,301,751	$32,030,028	-$23,728,277	15	$500	-47,457	550	-46,906
Beer, Wine, and Liquor Stores (NAICS 4453)	$8,058,126	$4,690,057	$3,368,069	4	$450	7,485	594	8,078
Health & Personal Care Stores (NAICS 446/NAICS 4461)	**$88,336,763**	**$94,409,330**	**-$6,072,567**	**46**	**$350**	**-17,350**	**8,367**	**-8,983**
Gasoline Stations (NAICS 447/NAICS 4471)	**$142,393,179**	**$114,966,406**	**$27,426,773**	**39**	**$600**	**45,711**	**7,868**	**53,579**
Clothing and Clothing Accessories Stores (NAICS 448)	**$61,691,135**	**$33,482,207**	**$28,208,928**	**56**		**78,759**	**5,493**	**84,252**
Clothing Stores (NAICS 4481)	$40,335,512	$20,225,591	$20,109,921	36	$330	60,939	4,052	64,991
Shoe Stores (NAICS 4482)	$9,608,512	$4,976,445	$4,632,067	4	$360	12,867	885	13,752
Jewelry, Luggage, and Leather Goods Stores (NAICS 4483)	$11,747,111	$8,280,171	$3,466,940	16	$700	4,953	556	5,509
Sporting Goods, Hobby, Book, and Music Stores (NAICS 451)	**$34,755,383**	**$31,659,248**	**$3,096,135**	**45**		**12,385**	**4,609**	**16,993**
Sporting Goods/Hobby/Musical Instrument Stores (NAICS 4511)	$29,524,047	$24,799,326	$4,724,721	40	$250	18,899	3,915	22,814
Book, Periodical, and Music Stores (NAICS 4512)	$5,231,336	$6,859,922	-$1,628,586	5	$250	-6,514	694	-5,821
General Merchandise Stores (NAICS 452)	**$217,649,028**	**$185,916,817**	**$31,732,211**	**34**		**90,663**	**20,616**	**111,280**
Department Stores Excluding Leased Depts. (NAICS 4521)	$156,754,739	$158,089,435	-$1,334,696	11	$350	-3,813	14,848	11,035
Other General Merchandise Stores (NAICS 4529)	$60,894,289	$27,827,382	$33,066,907	23	$350	94,477	5,768	100,245
Miscellaneous Store Retailers (NAICS 453)	**$58,563,260**	**$45,979,593**	**$12,583,667**	**126**		**22,362**	**7,104**	**29,465**
Florists (NAICS 4531)	$1,995,395	$3,359,546	-$1,364,151	16	$300	-4,547	221	-4,327
Office Supplies, Stationery, and Gift Stores (NAICS 4532)	$12,181,526	$6,144,312	$6,037,214	19	$250	24,149	1,615	25,764
Used Merchandise Stores (NAICS 4533)	$6,564,821	$20,730,080	-$14,165,259	44	$200	-70,826	1,088	-69,738
Other Miscellaneous Store Retailers (NAICS 4539)	$37,821,518	$15,745,655	$22,075,863	47	$300	73,586	4,180	77,766
Nonstore Retailers (NAICS 454)	**$23,321,914**	**$13,614,942**	**$9,706,972**	**9**				
Electronic Shopping & Mail-Order Houses (NAICS 4541)	$16,437,103	$3,663,086	$12,774,017	4	n/a	n/a	n/a	n/a
Vending Machine Operators (NAICS 4542)	$1,246,207	$2,322,125	-$1,075,918	1	n/a	n/a	n/a	n/a
Direct Selling Establishments (NAICS 4543)	$5,638,604	$7,629,731	-$1,991,127	4	n/a	n/a	n/a	n/a
Food Services & Drinking Places (NAICS 722)	**$139,738,793**	**$136,686,930**	**$3,051,863**	**216**		**8,139**	**8,303**	**16,442**
Special Food Services (NAICS 7223)	$1,216,238	$1,481,357	-$265,119	8	$500	-530	81	-450
Drinking Places - Alcoholic Beverages (NAICS 7224)	$9,898,561	$16,670,922	-$6,772,361	22	$700	-9,675	469	-9,206
Restaurants/Other Eating Places (NAICS 7225) [7]	$128,623,994	$118,534,651	$10,089,343	186	$550	18,344	7,753	26,097
	$1,477,288,750	**$1,326,339,002**	**$150,949,748**	**811**		**397,116**	**115,890**	**513,007**

[1] Demonstrated purchases of households within the designated area from Esri for 2020.

[2] Sales achieved within the designated area from Esri 2020.

[3] Higher sales relative to demand show the impact of outside demand sources which may be underserved and drive farther. Lower sales indiates "leakage" out of the area.

[4] Esri 2020 for Moore County.

[5] Bizminer Sales per Square Foot Report and emarketer.com.

[6] Gross Retail Gap (Surplus) divided by sales per square foot by category.

[7] Estimated new household growth times the expenditures by type by household divided by sales per square foot.

[8] Esri.

Additional Retail Data

Name	Address	Year Built	Size (SF)	SF Available	Vacancy Rate	Est. Asking Rent (SF/YR)	Type	Major Tenants
Pinecroft Shopping Center	150 Ivey Lane, Pinehurst, NC 28734	2016	86,020	3,800	4.4%	$24	Plus TICAM	Harris Teeter, McDonald's, Rite Aid, First Health, Kung Fu, Domino's, Schneider Stone, Audible, Fantastic Sams, Lee Nail's and Anytime Fitness opening soon.
Pinehurst Plaza	1680 NC Highway 5, Aberdeen, NC 28315	1984	49,446	9,600	19.4%	$6	NNN	Food Lion, Nail City, New China 1680 Restaurant
Pinecrest Plaza	1 Pinecrests Plaza, Southern Pines, NC 28387	Renovated 2014	277,570	5,166	1.9%	n/a	n/a	Belk, Michaels, BAM, Chico's, Talbots, Pier One, Hallmark, Bath & Body Works, Belk Men's Store, Hibbet Sports, Cato, Hair Cuttery, Food Lion, Claire's, The Shoe Department, Rite Aid, GNC, Francesca's, Apricot Lane,
Southern Pines Village	190 Brucewood Rd, Southern Pines, NC 28287	2011	244,793	3,796	1.6%	$20	NNN	Hobby Lobby, Kohl's, Ulta, Dollar Tree, Frozen Yogurt, Beverly Nails, Brixx, Longhorn Steakhouse, Outback Steakhouse, Triangle Wine
Center Park Shopping Center	11109 US Highway 15 501, Aberdeen, NC 28315		113,536	7,720	6.8%	n/a	n/a	Harris Teeter, Dick's, BB&T, McDonalds, Taco Bell, Nails
Sandhill Shopping Center	1800 N Sandhills Blvd, Aberdeen, NC 28315		97,702	17,869	18.3%	$21.5	NNN	Food Lion, Advance Auto Parts, Family Dollar, Dunkin Donuts
Town & Country Shopping Center	1315 N Sandhills Blvd, Aberdeen, NC 28315	1965/2005	77,462	12,752	16.5%	$13 Avg ($8-$20)	NNN	Big Lots, Badcock and More Furniture, Dollar General, Aaron Rents, Tuesday Morning, Texas Roadhouse and Sears Hometown Store









Additional Retail Data



1


246 Olmsted Blvd
Central Park South
Pinehurst, NC

Built in 2005
1,735 SF Retail Space
$20.00 SF/YR

2


150-350 Ivey Ln
PineCroft Shopping Center- Harris
Pinehurst, NC

4 Star | Built in 2016
2,400 SF Retail Space
$24.00 SF/YR

3


2212 Midland Rd
Pinehurst, NC

Built in 1900
1,150 SF Retail Space
$18.26 SF/YR

4


1680 NC Highway 5
Pinehurst Plaza
Aberdeen, NC

Built in 1984
9,600 SF Retail Space
$6.00 SF/YR

5
Restaurant


100 Pavilion Way
The Pavilion at Morganton Park
Southern Pines, NC

Built in 2016
100 - 8,186 SF Spaces
$18.00 - $28.00 SF/YR

6


Brucewood Rd
Southern Pines Village
Southern Pines, NC

Built in 2011
3,500 - 7,796 SF Retail Spaces
$20.00 SF/YR

7


10840 US 15-501 Hwy
Sandhills Commons
Southern Pines, NC

4 Star | Built in 2020
1,700 SF Retail Space
$35.00 SF/YR

8


340 Commerce Ave
Yadkin Plaza
Southern Pines, NC

Built in 2001
1,500 - 7,500 SF Spaces
$12.00 SF/YR

9


375 Pinehurst Ave
Southern Pines, NC

Built in 1984
1,030 SF Retail Space
$11.65 SF/YR

10


170-190 Commerce Ave
Southern Pines, NC

Built in 1999
1,920 - 3,968 SF Spaces
2 Spaces Available Now

11


206-216 Commerce Ave
Yadkin Park
Southern Pines, NC

Built in 1980
650 SF Retail Space
$15.00 SF/YR

12


290 Turner St
Shops on the Green
Southern Pines, NC

Built in 2001
1,000 SF Retail Space
1 Space Available Now

13


1369-1377 N Sandhills Blvd
Town & Country Shopping Center
Aberdeen, NC

Built in 1965
320 - 12,752 SF Retail Spaces
$8.00 - $20.00 SF/YR

14


Airport Rd & Hwy 22
Mill Creek Village
Southern Pines, NC

Built in 2017
1,271 - 2,773 SF Retail Spaces
$20.00 SF/YR

Source: Loopnet, December 1, 2020

Additional Office Data

	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	Total 2021-2030
Total Jobs in Moore County [1]	40,352	40,594	40,838	41,083	41,329	41,577	41,827	42,078	42,330	42,584	42,840	
x Projected Annual Growth Rate [2]	0.6%	0.6%	0.6%	0.6%	0.6%	0.6%	0.6%	0.6%	0.6%	0.6%	0.6%	
= Annual New Jobs in Moore County	242	244	245	246	248	249	251	252	254	256	257	2,502
x Percent of Jobs that are Office Related [3]		40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	
= Annual New Office Jobs in Moore County		97	98	99	99	100	100	101	102	102	103	1,001
x Square Feet of New Office Space Per Employee [4]		200	200	200	200	200	200	200	200	200	200	
= Annual Demand for New Office Space in Moore County		19,485	19,602	19,720	19,838	19,957	20,077	20,197	20,318	20,440	20,563	200,198

[1] Bureau of Labor Statistics

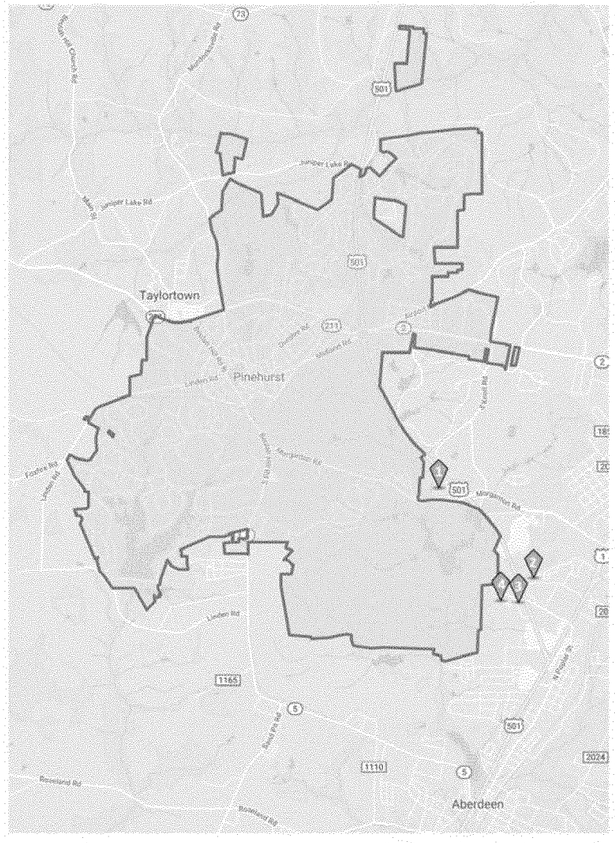
[2] North Carolina Department of Commerce, Labor & Economic Analysis. Growth rate for Pinehurst-Rockingham Area projected to be 0.6% annually from 2017-2026

[3] Based upon North Carolina Department of Commerce, Labor & Economic Analysis jobs by industry type

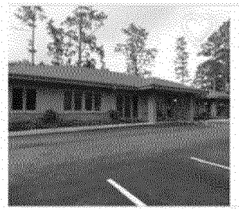
[4] Based upon industry standards

Name	Address	Year Built	Size (SF)	SF Available	Vacancy Rate	Est. Asking Rent (SF/YR)	Type	Tenant Types
Village Club Ct	7 Village Club Ct, Southern Pines, NC 28387	2019	4,000	1,675	42%	$22	Gross	Medical, Investment firms, contrator, assisted living
No Name	305 Murray Hill Rd, Southern Pines, NC 28387	2020	7,000	2,000	29%	n/a	n/a	Moore Floors
Pavilion	100 Pavilion Way, Southern Pines, NC 28387	2017	25,413	4,428	17%	$67	Gross	
Same Bldg as Chamber	160 W New York Ave, Southern Pines, NC 29387	2020	10,000	2,950	30%	$19	Gross	
Yadkin Plaza	340 Commerce Ave, Southern Pines, NC 29387	2001	25,000	7,500	30%	$12	Gross	Office, medical, retail or professional services

Source: Internet searches



1



7 Village Club Ct
Southern Pines, NC

Built in 2019
1,674 SF Office Space
$22.00 SF/YR

2



305 Murray Hill Rd
Southern Pines, NC

Built in 2020
2,000 SF Office Space
1 Space Available Now

3



170-190 Commerce Ave
Southern Pines, NC

Built in 1999
1,920 - 3,968 SF Spaces
2 Spaces Available Now

4

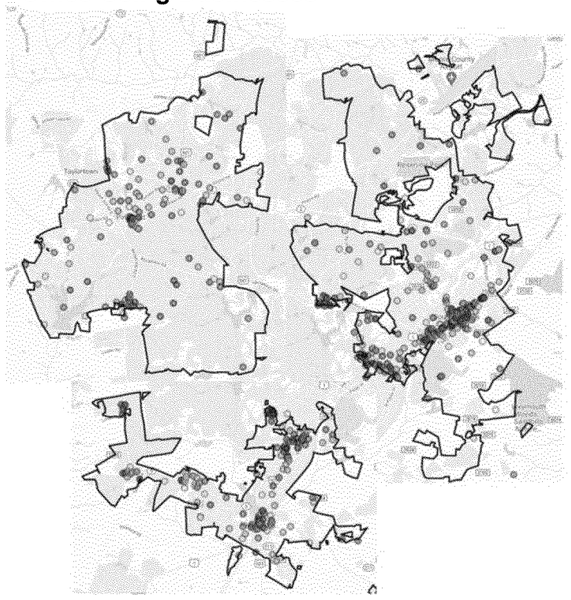


340 Commerce Ave
Yadkin Plaza
Southern Pines, NC

Built in 2001
1,500 - 7,500 SF Spaces
$12.00 SF/YR

Source: Loopnet, December 1, 2020

Office-Using Businesses



Health Care & Social Services Businesses



Source: Economic Development Partnership of NC

Additional Hospitality Data

HOTEL ROOMS
PINEHURST AREA
DECEMBER 2020

	PINEHURST AREA HOTEL ROOMS[1]	CHANGE IN HOTEL ROOMS	% CHANGE IN HOTEL ROOMS
2000	1,269		
2001	1,369	100	7.9%
2002	1,369	0	0.0%
2003	1,369	0	0.0%
2004	1,369	0	0.0%
2005	1,369	0	0.0%
2006	1,369	0	0.0%
2007	1,509	140	10.2%
2008	1,586	77	5.1%
2009	1,586	0	0.0%
2010	1,586	0	0.0%
2011	1,586	0	0.0%
2012	1,586	0	0.0%
2013	1,586	0	0.0%
2014	1,586	0	0.0%
2015	1,586	0	0.0%
2016	1,675	89	5.6%
2017	1,675	0	0.0%
2018	1,675	0	0.0%
2019	1,675	0	0.0%
2020	1,778	103	6.1%
Total	1,778	509	28.6%
Average Annual	n/a	25	1.4%

[1] Convention & Visitors Bureau, Pinehurst, Southern Pines, Aberdeen Area and Duggal Real Estate Advisors

Year	PINEHURST AREA HOTEL ROOMS ADDED[1]
1896	10
1901	334
1901	15
1913	36
1923	82
1923	42
1972	120
1980	88
1988	123
1988	77
1996	77
1996	80
1998	78
1999	107
2001	100
2007	37
2007	103
2008	77
2016	89
2020	103

[1] Convention & Visitors Bureau, Pinehurst, Southern Pines, Aberdeen Area and Duggal Real Estate Advisors

Hotel Demand Projection Based on Competitive Supply and Projected Occupancy	2016	2017	2018	2019	2020	Projected 2021	2022	2023	2024	2025	2026
Total Existing Rooms [1]	1,675	1,675	1,675	1,675	1,778	1,778	1,778	1,778	1,778	1,778	1,778
Total Room Nights [2]	670,323	670,323	669,775	669,775	644,495	644,495	644,495	644,495	644,495	644,495	644,495
Demand [3]	407,556	383,990	407,615	424,472	300,292	345,336	414,403	422,691	431,145	439,768	448,563
YOY Increase in Demand		-5.8%	6.2%	4.1%	-29.3%	15.0%	20.0%	2.0%	2.0%	2.0%	2.0%
Occupancy	60.8%	58.7%	62.5%	65.1%	46.7%	53.6%	64.3%	65.6%	66.9%	68.2%	69.6%
Baseline Occupancy for Healthy Hotel Market [4]	65%	65%	65%	65%	65%	65%	65%	65%	65%	65%	65%
Additional Supportable Hotel Room Nights	-28,154	-51,720	-27,739	-10,882	-118,630	-73,586	-4,519	3,769	12,223	20,846	29,641
Additional Rooms Supported in County			-76	-30	-325	-202	-12	10	33	57	81

[1] Total room supply within Moore County
[2] Calculation of rooms nights available per year based on total rooms
[3] Based on demonstrated room nights occupied (demand) within the county
[4] The hotel industry standard of a "healthy" market is 65% occupancy

SOURCE: Duggal Real Estate Advisors, Smith Travel Research, Moore County CVB

	2014	2015	2016	2017	2018	2019	2020
Annual Visitors (M)			1.16	1.25			
Room Supply			670,323	670,323	669,775	669,775	644,495
Room Demand			400,853	383,990	407,615	424,472	300,292
Occupancy	58.00%	60.30%	60.80%	58.70%	62.50%	65.10%	46.70%
ADR	$138.11	$133.55	$137.30	$126.53	$128.80	$139.08	$131.05
RevPAR	$79.55	$80.58	$83.24	$74.25	$80.54	$90.49	$61.26
2016 and earlier - CVB Annual Report							
2017-2020 - STR. Based upon year-to-date data from Jan-Nov. Supply and demand year-long							

Additional Golf Data

	Moore County		
	2020	2030	Change
Total Population [5]	102,950	119,674	16,724
Est. Golf Participation [1]	7.5%	7.5%	0
Total Golfers	7,721	8,976	1,254
Rounds Per Golfer Per Year	18.2	18.2	0
Total Rounds	140,527	163,355	22,828
Rounds Per Course [4]	35,000	35,000	0
Courses Supported	4.0	4.7	0.7
Annual Tourists [3]	1,140,000	1,198,300	58,300
Percent that Golf While Traveling [3]	92%	92%	0
Golfers	1,048,800	1,102,436	53,636
Avg. Rounds While Visiting [3]	1.3	1.3	0
Total Rounds	1,398,400	1,469,914	71,514
Rounds Per Course	35,000	35,000	0
Courses Supported	40	42	2
Total Courses Supported	44.0	46.7	2.7
Current Courses	43.0		

[1] Based upon National Golf Foundation data. Nationally, 7.5% of people participate in golf

[2] Based upon National Golf Foundation data. Nationally, people play 18.2 rounds per year

[3] Convention & Visitors Bureau, Pinehurst, Southern Pines, Aberdeen Area. 2030 based upon 0.5% growth per year.

[4] National Golf Foundation. The national average is approximately 30,000 rounds per year. This was adjusted up to determine the set point of the golf market in Moore County

[5] North Carolina OSBM, Standard Population Estimates, Vintage 2018 and Population Projections, Vintage 2019

Resort / Membership Type	Number of Members	Included with Land/Home Purchase	Real Estate Ownership Required	Golf	Initiation Fee	Annual Golf Dues	Tennis	Notes
Country Club of North Carolina	n/a	Available	No	2 Courses			8 courts	
Resident & Moore County					$20,000	$11,280		
North Carolina & National					$10,000	$6,309		National Annual dues are $5,175
Overseas					$3,000	$3,111		
Patriot (3-year associate) & Under 40					$1,500	$3,780		
Social					$10,000	$5,175		
Pinehurst Country Club	4000+/-	Available	No	10 Courses			16 courts	
Signature Golf (Unlimited Nos. 1-9)				1 is 9 holes	$45,000	$7,440		Properties with membership
Premier Golf (Unlimited Nos. 1-6, includes 8)					$25,000	$7,440		attached can apply for membership
Classic Golf (Unlimited Nos. 1-6)					$25,000	$6,240		at 50% off initiation fee
Sports (Discounted Rates)					$16,000	$2,664		
Social (Discounted Rates, 10 Rounds Max)					$10,000	$1,932		
Forest Creek	n/a	Available	Varies	2 Courses			2 courts	
Regular			Yes		$50,000	$11,180		Homeowners Only. Refundable & transferable
Charter II			No		$50,000	$11,180		Non-Homeowners. Non-Refundable
Junior			No		$5,000	$5,590		Under Age 40
Legacy			No		Waived until 40			Children & Grandchildren
Social			Yes		$5,000	$2,780		Homeowners Only.
Pinewild	n/a	Available	No	3 Courses	Transfer Fees		3 courts	
Full Golf				1 is 9 holes	$12,500	$5,700		New member = $25,000
Club					$7,500	$1,980		
Leisure					$5,000	$135		
Mid South Club	400 Max	Some	Varies	2 Courses	Transfer Fees		Y	Affiliate ownership with Talamore
Charter - Magnolia Full Golf			Yes		$12,500	$4,650		New Member = $35,000
Charter - Presidential Full Golf Premier			Yes		$27,500	n/a		Additional $15K Fee refundable
Signature			No		$35,000	n/a		
Holly Social			Yes		n/a	n/a		
Source: Internet searches on Nov. 24, 2020.								

Additional Golf Data

Course Name	Addresss	Holes	Rating/Slope	Par	Yardage	Avg. Green Fees	Designer	Description
Country Club of North Carolina – Cardinal Course	1600 Morganton Road, Pinehurst, NC 28374	18	75.2/140	72	7,215	Private	Wiliard Byrd	A private course featuring two distinct 9-hole courses that rank amongst the top in North Carolina.
Country Club of North Carolina – Dogwood Course	1600 Morganton Road, Pinehurst, NC 28374	18	74.9/135	72	7,301	Private	Ellis Maples	Opened in 1963, the Dogwood course has been home to many championship events through its tenure.
Forest Creek Golf Club – North	200 Meyer Farm Road, Pinehurst, 29384	18	74.7/144	72	7,209	Private	Tom Fazio	A private course featuring sprawling waste areas, ragged-edged bunkers and a pine barrens feel.
Forest Creek Golf Club – South	200 Meyer Farm Road, Pinehurst, 29384	18	73.71/139	72	7,095	Private	Tom Fazio	Patterned after Augusta National, experience 18 holes draped across the landscape of the Sandhills.
Midland Country Club	2205 Midland Road, Pinehurst, NC 28374	18	69.9/110	70	6,186	$34	Tom Jackson	A beautifully conditioned, friendly and challenging 9-hole course with multi-tee configurations for all levels.
Pinehurst No. 1	1 Carolina Vista, Pinehurst, NC 28374	18	68.4/118	70	Blue: 6,089	$115	Donald Ross	A great starting round at the Pinehurst Resort, experience a layout that has stood the test of time.
Pinehurst No. 2	1 Carolina Vista, Pinehurst, NC 28374	18	76.5/138	70	7,565	$403	Donald Ross	World renowned for unforgettable championships, Donald Ross' No. 2 remains the heart of Pinehurst golf.
Pinehurst No. 3	1 Carolina Vista, Pinehurst, NC 28374	18	63.3/118	70	White: 5,722	$115	Donald Ross	While the shortest of courses at Pinehurst Resort, don't let the modest distance fool you.
Pinehurst No. 4	1 Carolina Vista, Pinehurst, NC 28374	18	74.9/138	72	Gold: 7,226	$323	Gil Hanse	No. 4 features the most interesting topography of Pinehurst Resort with a shimmering lake as its centerpiece.
Pinehurst No. 5	1 Carolina Vista, Pinehurst, NC 28374	18	72.6/132	72	Gold: 6,848	$115	Ellis Maples	Featuring the most water hazards at the resort and variety at every hole, No. 5 is 18 holes that won't disappoint.
Pinehurst No. 6	97 Juniper Creek Blvd, Pinehurst, NC 28374	18	74.7/139	72	Gold: 7,053	$236	Tom Fazio	Renovations by Tom Fazio in 2005 have made these rolling hills a test from every tee box.
Pinehurst No. 7	14 Inverrary Road, Pinehurst, NC 28374	18	75.5/143	72	Gold: 7,216	$236	Rees Jones	Rugged terrain and landforms assist as much as they challenge when you play this Rees Jones masterpiece.
Pinehurst No. 8	100 Centennial Blvd, Pinehurst, NC 28374	18	74.1/138	72	Gold: 7,092	$236	Tom Fazio	Ross-inspired false fronts, sloping greens and more challenge and delight all skill levels on this walkable course.
Pinehurst No. 9	1 Royal Troon Drive, Pinehurst, NC 28374	18	75.5/135	72	Gold: 7,118	$236	Jack Nicklaus	Not to be outdone, Nicklaus made his mark on Pinehurst with this masterpiece amidst the pines.
The Cradle (at Pinehurst)	1 Carolina Vista Drive, Pinehurst, NC 28374	9	N/a	27	789	$50	Gil Hanse	The most fun 9 holes in golf, the Cradle features an affordable, long nine holes steps away from Pinehurst Resort.
Pinewild Country Club – Azalea Course	6 Glasgow Drive, Pinehurst, NC 28374	18	N/a	27	Blue: 1,438	Private	None	Some of the finest par-3 holes you will ever play, traversing a rolling landscape tucked into the pines.
Pinewild Country Club – Holly Course	6 Glasgow Drive, Pinehurst, NC 28374	18	73.9/141	72	Black: 7,021	Private	Gary Player	Few bunkers, more water and smaller greens, this signature design by Gary Player cannot be missed.
Pinewild Country Club – Magnolia Course	6 Glasgow Drive, Pinehurst, NC 28374	18	76.4/135	72	Black: 7,446	Private	Gene Hamm	A fantastic layout with an emphasis on risk/reward golf, open fairways with elevation lead to challenging greens.
Legacy Golf Links	12615 US Hwy 15-501 South, Aberdeen, NC 28315	18	73.2/132	72	Black: 7,018	$39	Jack Nicklaus II	While a championship course, it's a "must play" for golfers of all skill levels when visiting the Sandhills.
Foxfire Resort & Golf Club – Grey Fox Course	9 Foxfire Boulevard, Foxfire Village, NC 27281	18	73.1/131	72	6,851	$45	Gene Hamm	Hilly terrain with several doglegs cutting through the towering pines makes a playable challenge.
Foxfire Resort & Golf Club – Red Fox Course	9 Foxfire Boulevard, Foxfire Village, NC 27281	18	72.8/132	72	6,743	$45	Gene Hamm	Wide manicured fairways and large, fast rolling greens make the Red Fox Course a member favorite.
Hyland Golf Club	115 Fairway Avenue, Southern Pines, NC 28387	18	72.1/141	72	6,823	$65	Tom Jackson	Regarded as a favorite in the Village of Pinehurst, this newly restored course provides immaculate conditions.
Knollwood Fairways & Driving Range	1470 Midland Road, Southern Pines, NC 28387	9	63.8/110	35	2,517	$34	C.A. Pitts	A challenging, yet un-intimidating 9-hole course, finesse the art of shot making at Knollwood.
Longleaf Golf & Family Club	10 N. Knoll Road, Southern Pines, NC 28387	18	71.6/128	71	6,602	$62	Dan Maples	Longleaf provides an exceptional experience for every golfer, coined as 'the most playable course in the Sandhills.'
Mid Pines Inn & Golf Club	1010 Midland Road, Southern Pines, NC 28387	18	71.0/126	72	6,723	$85	Donald Ross	True to Ross' original design while manicured to modern standards, experience an impeccable championship course.
Mid South Club	610 Palmer Drive, Southern Pines, NC 28387	18	73.9/140	71	Black: 7,003	Private	Arnold Palmer	A signature Arnold Palmer course that provides a challenging, yet enjoyable championship layout.
Pine Needles Lodge & Golf Club	1005 Midland Road, Southern Pines, NC 28387	18	70.6/126	71	7,015	$85	Donald Ross	Family-owned for three generations, Pine Needles provides a completely restored Donald Ross championship course.
Southern Pines Golf Club	290 Country Club Circle, Southern Pines, NC 28387	18	69.9/127	71	6,268	$65	Donald Ross	Some of the most rewarding 18 holes in the area designed by Donald Ross with challenges from the tee box to the green.
Talamore Golf Resort	48 Talamore Drive, Southern Pines, NC 28387	18	73.2/140	71	Gold: 6,840	$69	Rees Jones	In class Scottish design, Talamore takes Rees Jones' original design to the next level for an accommodating round.
Beacon Ridge Country Club	238 Longleaf Drive, West End, NC 27376	18	71.3/136	72	6,414	$35	Gene Hamm	A classic layout providing a challenge to golfers of every ability in Pinehurst tradition.
Dormie Club	6033 Beulah Hill Church Rd, West End, NC 27376	18	72.3/130	71	6,576	Private	Coore & Crenshaw	Away from residences and roadways, Dormie provides a natural and magical 18 holes to enjoy in the Sandhills.
Seven Lakes Golf Club	124 E. Devonshire Avenue, West End, NC 27376	18	74.0/142	72	6,869	$35	Peter Tufts	A most-exciting course in classic design and paired with in-round amenities seen nowhere else in the area.
Country Club of Whispering Pines – Pines Course	2 Country Club Boulevard, Whispering Pines, NC 28327	18	74.0/133	72	7,094	$27	Ellis Maples	Subtle terrain changes and generous fairways provide a challenge on a true "inland links" course.
Country Club of Whispering Pines – River Course	2 Country Club Boulevard, Whispering Pines, NC 28327	18	70.8/129	72	6,521	$29	Ellis Maples	Elevation changes, oak-lined fairways, and smaller greens will take some "shot making" you can brag about.
Whispering Woods Golf Club	26 Sandpiper Drive, Whispering Pines, NC 28327	18	70.8/134	72	Blue: 6,324	$30	Ellis Maples	Inspired by this rolling track of land, Ellis Maples designed this signature challenge in the Sandhills for all levels of skill.

SOURCE: Convention & Visitors Bureau, Pinehurst, Southern Pines, Aberdeen Area. Rates based upon an average of posted 2020 rates or rates for the week of Nov. 24, 2020.



Focus Area 4: Village Place/ Rattlesnake Trail Corridor

Village Place and the Rattlesnake Trail corridor offer interesting opportunities to expand the footprint of the Village Center and provide a new front door to the historic downtown area from NC Highway 211. Approximately 100 acres in the focus area are represented by 70 different parcels. 13% of the land was identified as undeveloped in 2018, but significant land may become available in the future for redevelopment or infill development. Property owned by the Village along McCaskill Road (the Public Services Complex) provides the Village with an opportunity to influence development types and intensities in and around this walkable activity center.

During Envision the Village, an overwhelming majority of residents indicated their preference to convert existing development in the Village Place/Rattlesnake Corridor to a more mixed use, walkable destination that is in keeping with the character of the existing Village Center. This is consistent with resident input received throughout the entire Comprehensive Plan process that residents want walkable activity centers that are linked to open spaces and recreational areas and can offer a broader range of housing options beyond the traditional single-family neighborhood

In 2008, the Village adopted the New Core Master Plan, or a small area plan, for a portion of this Focus Area. This plan has guided recent development in this area, including the newly refurbished historic steam plant that now houses the Pinehurst Brewery. This Plan recommends extending the planning area to the Rattlesnake Trail corridor to include this important gateway into the Village off NC Highway 211, which has been widened since the adoption of the New Core Master Plan. It is important that any future redevelopment of this area compliment and support, rather than harm, the cherished and well-loved Village Center. To affect redevelopment of this area, the Village will also need to consider relocating its current Public Services Complex. See the "*Supporting Infrastructure & Facilities*" and "*Taking Care of Business*" sections of the Plan for additional discussion and information.

During Envision the Village, residents expressed an interest in relocating office uses on the first floor in the Village Center to Village Place. They also identified Village Place as an opportunity to re-invigorate the Village with arts related businesses and cultural attractions. As the Village contemplates future uses in this area, it will be important to address the need for parking. Creating an updated small area plan for Village Place, with additional public input, can help articulate the community's vision for this area and help encourage the redevelopment of this often referred to as "blighted" area that is not consistent with the character of Pinehurst today.

► Implementation Strategies:

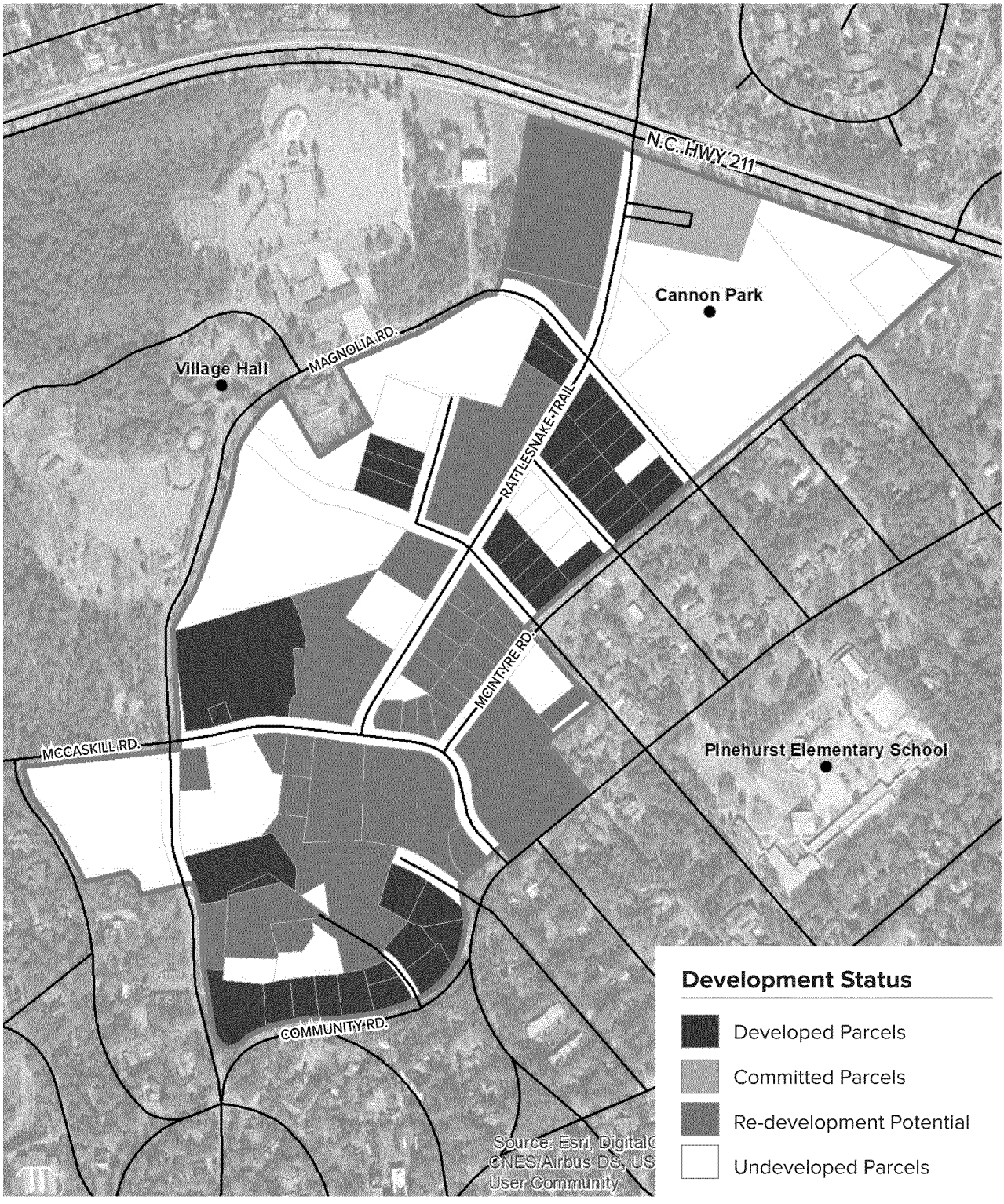
2.8 Create a small area plan for the Village Place/Rattlesnake Trail Corridor depicted in Focus Area 4 to create a mixed-use, walkable destination area that is connected to the Village Center.

Also see Implementation Strategies 2.10, 2.11, 2.12, 2.13, 2.15, 2.16, and 2.20 in this section of the Plan.

Also see Implementation Strategies 4.7, 4.8, 4.9, 4.13, 4.14, and 4.16 in the "*Moving Around the Village*" section of the Plan.

Also see Implementation Strategies 5.1, 5.2, 5.3, 5.4, 5.5, 5.9, 5.11, 5.13, and 5.14 in the "*Taking Care of Business*" section of the Plan.

Also see Implementation Strategy 6.1, 6.5, 6.11 in the "*Supporting Infrastructure & Facilities*" section of the Plan.


N.C. HWY 211
Cannon Park
Village Hall
MAGNOLIA RD.
RATTLESNAKE TRAIL
MCINTYRE RD.
MCCASKILL RD.
Pinehurst Elementary School
COMMUNITY RD.
Source: Esri, DigitalG
©NES/Airbus DS, US
User Community
Development Status
Developed Parcels
Committed Parcels
Re-development Potential
Undeveloped Parcels

This scenario illustrates how the Rattlesnake Trail Corridor area might develop if resources are (re) targeted to make it into a mixed-use, walkable destination in the Village that extends the historic core north along Rattlesnake Trail to NC Hwy. 211. Existing industrial, retail, and multifamily uses in the area would be redeveloped into destinations that reinforce the one-of-a-kind village-character of Pinehurst. New buildings in the scenario are assumed to be one to three stories tall. Parking would be accommodated in a parking deck and series of surface lots and on-street parking. The scenario also assumes completion of the new recreation center at the corner of NC Hwy. 211 and Rattlesnake Trail.

Use Allocation	
Open Space (acres)	26.9
Single-Family Detached (d.u.)	5
Single-Family Attached (d.u.)	11
Stacked Multi-Family (d.u.)	214
General Office (s.f.)	158,140
General Retail (s.f.)	316,280

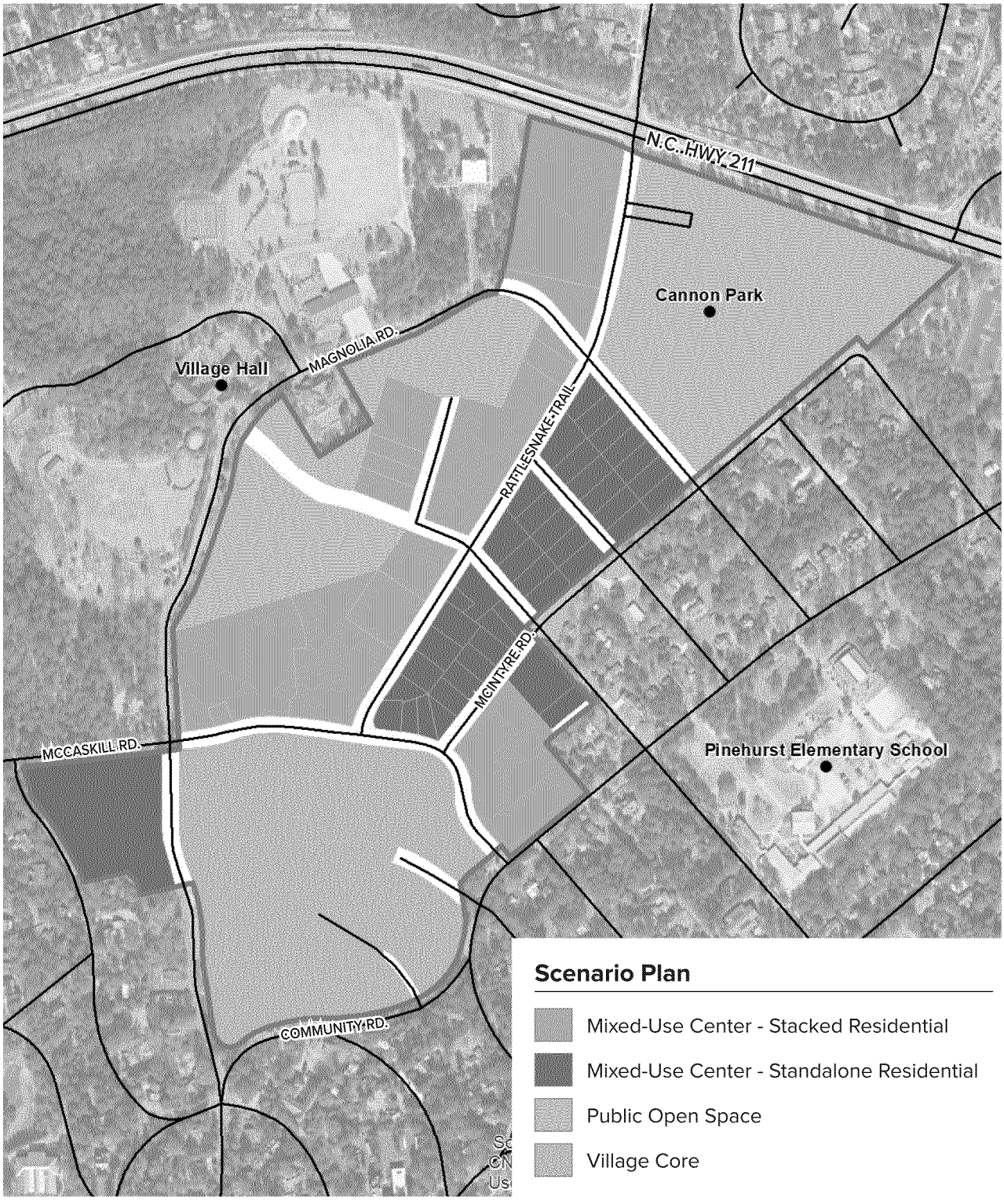
Likely Infrastructure Impacts	
New Students (students)	116
New Water Demand (mgd)	0.08
New Sewer Demand (mgd)	0.07
New Daily Trips (trips)	7,810

Community Character (% of acres)	
Public Open Space	23.3%
Mixed-Use Center - Stacked Residential	30.1%
Mixed-Use Center - Standalone Residential	19.2%
Village Core	27.4%

Home Choices	
Single-Family Detached	2.2%
Single-Family Attached	4.6%
Stacked Multi-Family	93.2%

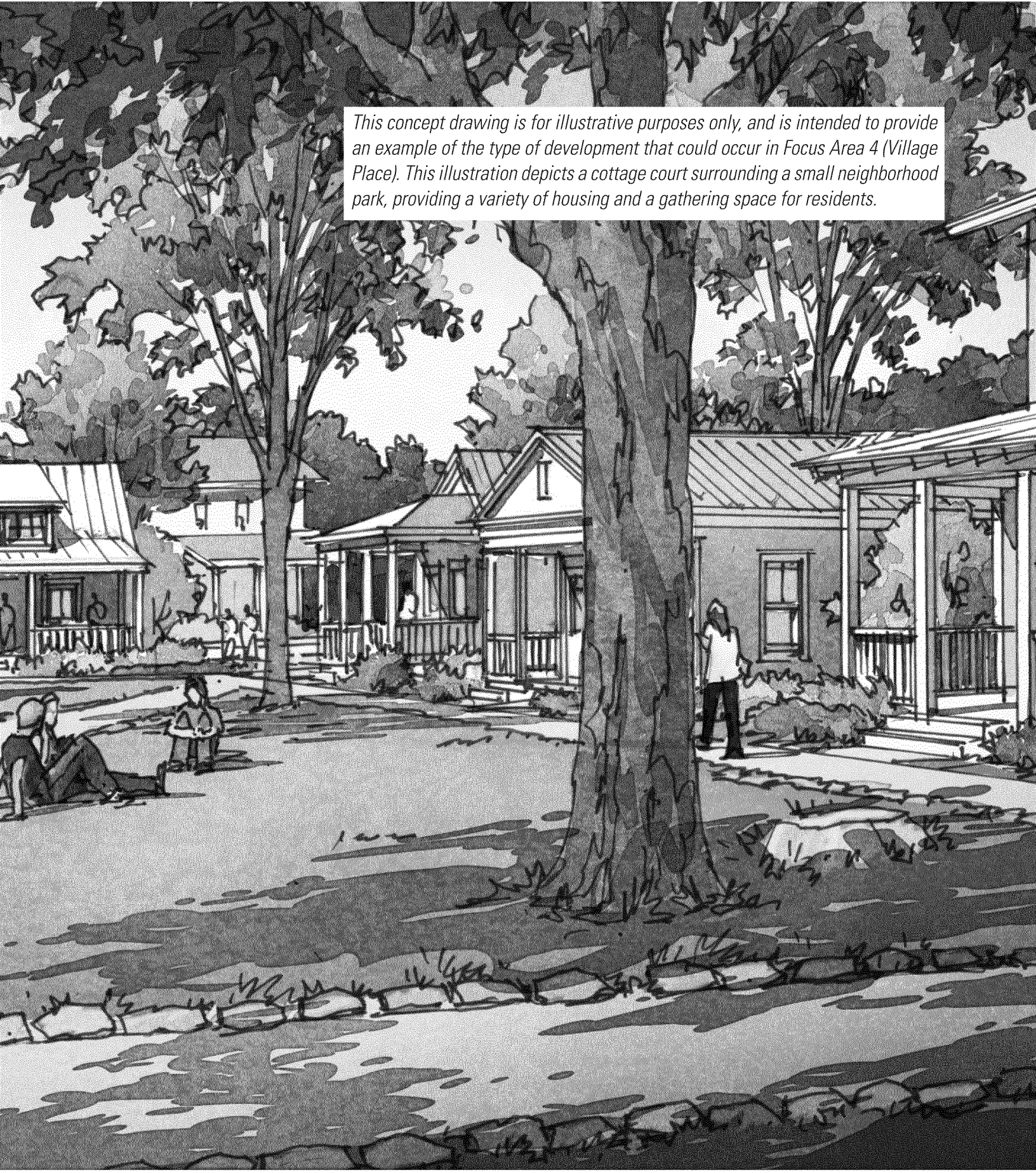
Community Characteristics	
New Residents	128
New Employees	1,560

Special Intensity Allocation	
WS-II BW Watershed (acres)	17
WS-III BW Watershed (acres)	-

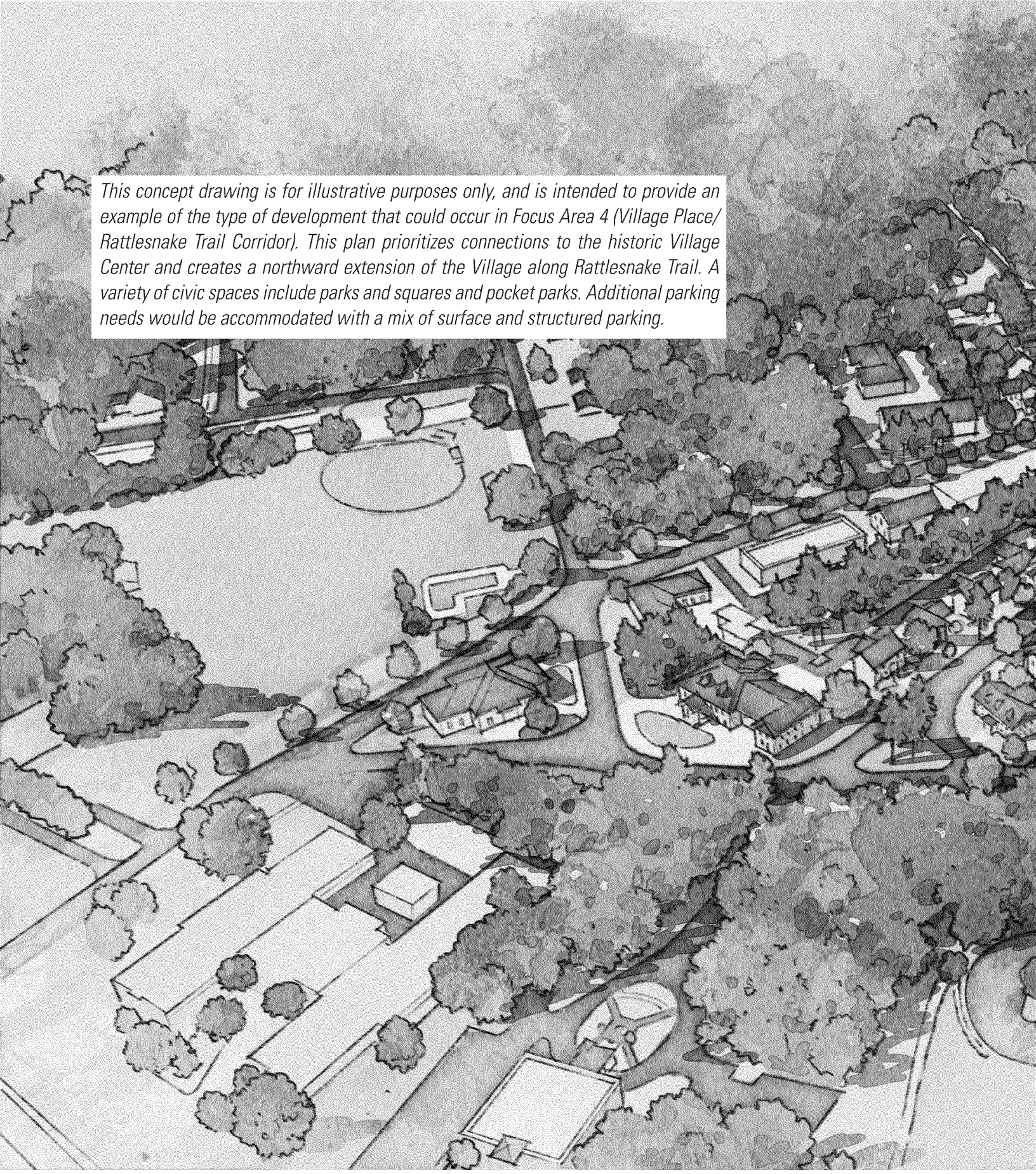

N.C. HWY 211
Cannon Park
Village Hall
MAGNOLIA RD.
RATTLESNAKE TRAIL
MCINTYRE RD.
MCCASKILL RD.
Pinehurst Elementary School
COMMUNITY RD.
Scenario Plan
Mixed-Use Center - Stacked Residential
Mixed-Use Center - Standalone Residential
Public Open Space
Village Core


PINEHURST BREWING COMPANY
PINEHURST





This concept drawing is for illustrative purposes only, and is intended to provide an example of the type of development that could occur in Focus Area 4 (Village Place). This illustration depicts a cottage court surrounding a small neighborhood park, providing a variety of housing and a gathering space for residents.



This concept drawing is for illustrative purposes only, and is intended to provide an example of the type of development that could occur in Focus Area 4 (Village Place/ Rattlesnake Trail Corridor). This plan prioritizes connections to the historic Village Center and creates a northward extension of the Village along Rattlesnake Trail. A variety of civic spaces include parks and squares and pocket parks. Additional parking needs would be accommodated with a mix of surface and structured parking.


ZANETTA

Focus Area 2: Highway 5 Commercial Area

New investment in the existing employment center on NC Highway 5, near the intersection of Blake Boulevard, provides interesting options to expand job opportunities in Pinehurst and increase access to facilities and services needed by residents. Approximately 290 acres in the Highway 5 Commercial Area Focus Area are represented by 145 different parcels. 47% of the land was identified as undeveloped in 2018, and additional land may be appropriate for redevelopment or infill development.

During Envision the Village, residents voiced concerns about how development of this Focus Area may impact traffic volumes on NC Highway 5 and Monticello Drive. Despite this, there was a recognition that current development in some portions of this Focus Area is not necessarily in keeping with the character of the Village and could be enhanced as redevelopment occurs.

This Plan recommends the Village consider creating a small area plan for this Focus Area with additional public input to ensure high quality development in keeping with the character of Pinehurst in the future. As discussed in the "*Taking Care of Business*" section of the Plan, the Village recognizes the need for the medical community to expand and the need to provide co-working and creative entrepreneurial spaces in the Village. With limited land designated for non-residential uses in the Village, this Focus Area may be a suitable area to provide adequate office space to support the local economy with an eye toward the workforce of the future. However, strict requirements for scale, density, and buffering requirements would need to be evaluated and considered. This can be accomplished by creating a small area plan, similar to the 2008 New Core Master Plan, which creates one connected master planned area with a primary focus on office, medical, life science, and research facilities with small-scale supporting retail services to create an "Innovation Hub". It could also include a residential component as well.

► Implementation Strategies:

2.3 Create a small area plan for the NC Highway 5 Commercial Area depicted in Focus Area 2 to facilitate redevelopment as an "Innovation Hub" with office, medical, life science, and research facilities supported with small-scale retail services and residential uses.

Also see Implementation Strategies 2.10, 2.11, 2.12, 2.13, 2.15, 2.16, 2.17, 2.18, and 2.20 in this section of the Plan.

Also see Implementation Strategies 4.2, 4.3, 4.6, 4.13, 4.14, and 4.15 in the "*Moving Around the Village*" section of the Plan.

Also see Implementation Strategies 5.12 and 5.13 in the "*Taking Care of Business*" section of the Plan.

Also see Implementation Strategies 6.1, 6.11, and 6.12 in the "*Supporting Infrastructure & Facilities*" section of the Plan.

Also see Implementation Strategy 7.14 in the "*All Things Green*" section of the Plan.



Development Status

- Developed Parcels
- Committed Parcels
- Re-development Potential
- Infill Development Potential
- Undeveloped Parcels

This scenario illustrates how the area might develop if it was transformed into an innovation hub, targeting greenfield development, infill development, and re-development opportunities in one connected master plan concept. Primary uses targeted for this area include medical, life science, and research facilities. Supporting uses may include retail, service, and some residential above first-floor, non-residential uses. New buildings in the area may be one to two stories tall. Surrounding residential neighborhoods would be connected to the village via a grid of walkable streets.

Use Allocation	
Single-Family Detached (d.u.)	8
Stacked Multi-Family (d.u.)	181
General Office (s.f.)	351,501
Medical Office (s.f.)	266,841
General Retail (s.f.)	209,976

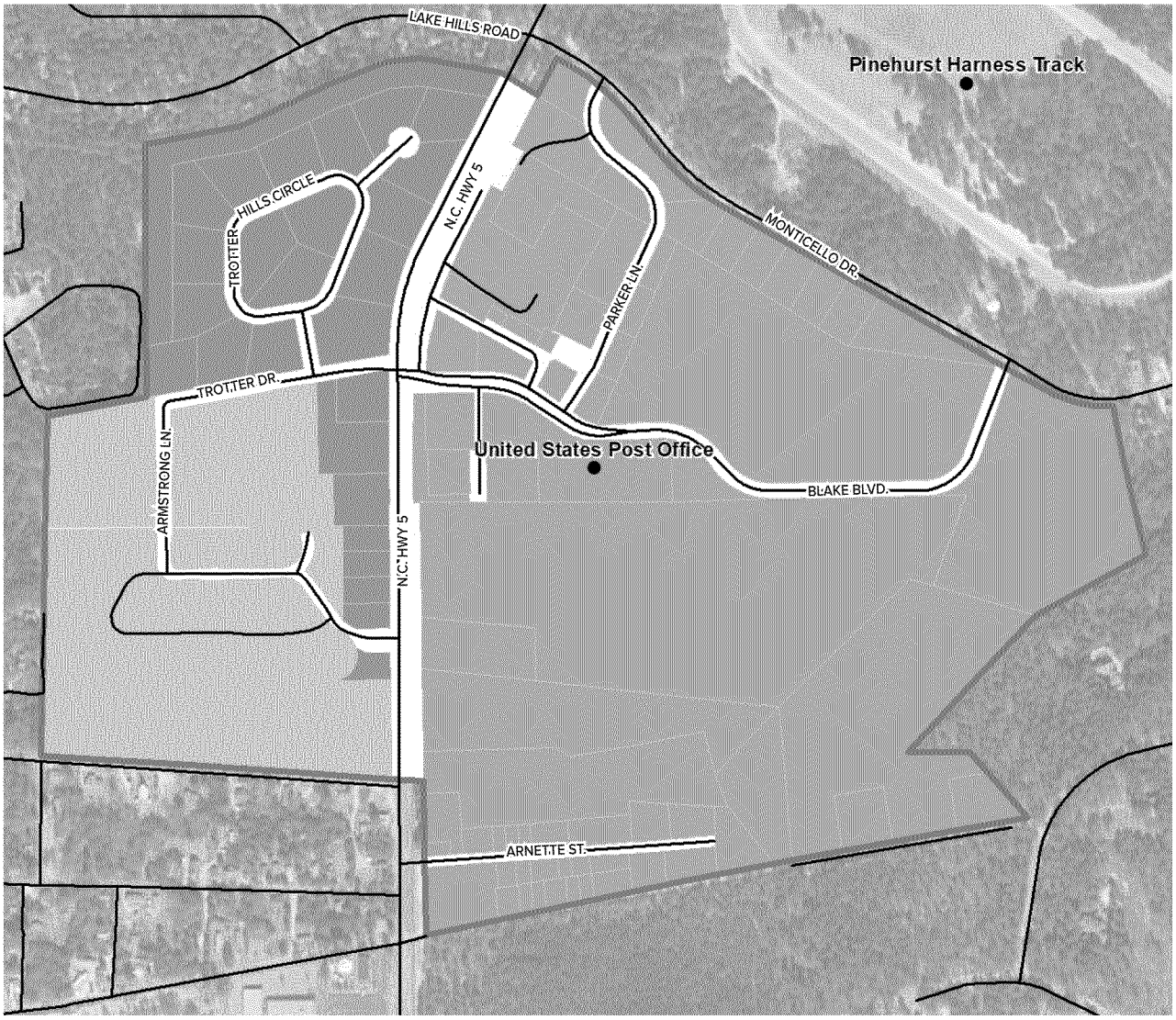
Likely Infrastructure Impacts	
New Students (students)	95
New Water Demand (mgd)	0.11
New Sewer Demand (mgd)	0.10
New Daily Trips (trips)	15,500

Community Character (% of acres)	
Suburban Neighborhood	19.9%
Suburban Center	14.8%
Mixed-Use Center - Stacked Residential	65.3%

Home Choices	
Single-Family Detached	4.2%
Stacked Multi-Family	95.8%

Community Characteristics	
New Residents	275
New Employees	3,137

Special Intensity Allocation	
WS-II BW Watershed (acres)	138
WS-III BW Watershed (acres)	-



Scenario Plan

- Mixed Use Center - Stacked Residential
- Suburban Center
- Suburban Neighborhood





This concept drawing is for illustrative purposes only, and is intended to provide an example of the type of "Innovation Hub" type development that could occur in Focus Area 2. This illustration depicts a mix of uses in a compact, walkable development pattern. A variety of open spaces including parks, plazas and greenways are provided for the enjoyment of residents and employees. The large central park area is intended as a space for gathering and collaboration.



VILLAGE OF PINEHURST SMALL AREA PLANS

Public Workshop #1 - Summary

MARCH 4, 2021 | FINAL

Design Collective

DUGGAL REAL ESTATE ADVISORS

Moving forward RKA RAMEY KEMP ASSOCIATES

TOWN OF VILLAGE OF PINEHURST

Overview

Stakeholder input and feedback are critical to creating a community-supported vision for Village Place and Pinehurst South. Public participation ensures that the plan addresses community concerns and ideas, fosters an inclusive and transparent planning process, identifies key opportunities and priority areas, and builds momentum to move the plan towards adoption and implementation.

In November 2020, the consultant team led by Design Collective, Inc. was engaged by the Village of Pinehurst to begin the Small Area Plans and Form-Based Codes for Pinehurst South and Village Place. The process approach was structured on a series of three phases to effectively examine, envision, and create a set of planning recommendations for the study areas.

A critical task in Phase 1 was to gather stakeholder input. This engagement was conducted through a variety of outreach methods.

Throughout December 2020 and January 2021, the consultant team conducted over 20 key stakeholder interviews, discussing the two plan areas with Village staff, appointed and/or elected officials, agency representatives, committee chairs, residents, local businesses and merchants, golf and tourist industry representatives, major employers, property owners, developers, brokers, and others to further understand their viewpoints.

In February 2021, the consultant team and Village of Pinehurst held Public Workshop 1 (of 3) to outline a vision for the future of the two Small Area Plans with public input and guidance. The Public Workshop was held virtually due to COVID-19. There were 148 registrants (including consultant and Village staff team members), and approximately 100 attendees participated. Darryn Burich (VOP) introduced the team and gave an overview of the project goals and objectives. Cecily Bedwell and Caitlin O'Hara (DCI) presented the project team, project introduction, project schedule and Existing Conditions. Melina Duggal (Dugaal Advisors) presented the Market and Economic Analysis.

Breakout Rooms were utilized to give participants the opportunity to ask questions, give input, and listen to other stakeholders. Each breakout room was facilitated by a member of the project team. Additionally, the project website provided outreach materials as well as an online survey and a summary of the presentation.

The following pages summarize the feedback received as a result of Public Workshop 1. The Appendix includes specific details from each of the seven Breakout Rooms.



SCREENSHOTS FROM THE VIRTUAL PUBLIC WORKSHOP PRESENTATION

VILLAGE PLACE POLLING QUESTIONS

The Public Workshop included two rounds of Polling Questions, one for Village Place and one for Pinehurst South. The polls were available live during the Public Workshop and also on the Project website for 10 days following the event. Participants were encouraged to use the polling questions to express their views on the strengths, weaknesses, and opportunities relating to each Small Area Plan.

This page shows the cumulative results of the Polling Questions for Village Place.

1. What are the strengths of Village Place, as it exists today? Check all that apply. (Multiple choice)

Proximity to the Village Core	(60/82) 73%
Proximity to NC 211	(27/82) 33%
Abundance of Open Space and Community Amenities, within and adjacent to the plan area	(54/82) 66%
Mix of Commercial, Institutional, and Residential uses	(25/82) 30%
Historic District / neighborhood character	(45/82) 55%
Walkability	(54/82) 66%
None of the above	(2/82) 2%

2. What are the weaknesses of Village Place, as it exists today? Check all that apply. (Multiple choice)

"Hodgepodge" / "Mishmash" of building types, styles, uses, etc.	(56/82) 68%
Industrial presence (storage tanks, service yard, light industrial uses)	(59/82) 72%
Incompatible development which does not reflect the character of the Village	(48/82) 59%
Many small parcels (hard to assemble; hard to redevelop cohesively)	(33/82) 40%
Lack of direct connectivity to Village Core	(27/82) 33%
Parking (not enough)	(32/82) 39%
None of the above	(1/82) 1%

3. What is your favorite or most frequented place to visit within Village Place? Choose one.

Village of Pinehurst Community Center	(7/82) 9%
Cannon Park ballfields	(4/82) 5%
Camelot Playground	(14/82) 17%
The Greens at Pinehurst Rehabilitation & Living Center (pre-COVID)	(1/82) 1%
Pinehurst Brewing Company (...it's ok; this survey is anonymous)	(31/82) 38%
Another business (a professional office, retail, restaurant or other establishment)	(9/82) 11%
A friend's house	(1/82) 1%
Other	(9/82) 11%
I do not spend any significant time here	(6/82) 7%

4. What would you like to see (more) of in Village Place? Check all that apply. (Multiple choice)

Retail – Neighborhood Goods and Services (grocery, pharmacy, florist, dry cleaner, nail salon, etc.)	(43/82) 52%
Retail – General Merchandise, Apparel, and Furnishings (clothing, electronics, bookstore, home improvement store, etc.)	(30/82) 37%
Restaurants (any type: sit-down, take-out, coffee shop, etc.)	(59/82) 72%
Office – General Office	(24/82) 29%
Office – Medical	(16/82) 20%
Residential – Apartments (for rent)	(13/82) 16%
Residential – Townhouses / Condo (for sale)	(31/82) 38%
Residential – Single-Family Detached houses (for sale)	(21/82) 26%
None of the above	(5/82) 6%

PINEHURST SOUTH POLLING QUESTIONS

The Public Workshop included two rounds of Polling Questions, one for Village Place and one for Pinehurst South. The polls were available live during the Public Workshop and also on the Project website for 10 days following the event. Participants were encouraged to use the polling questions to express their views on the strengths, weaknesses, and opportunities relating to each Small Area Plan.

This page shows the cumulative results of the Polling Questions for Pinehurst South.

1. What are the strengths of Pinehurst South, as it exists today? Check all that apply. (Multiple choice)

Proximity to Beulah Hill Rd - NC 5	(38/82) 46%
Proximity to Pinehurst Plaza shopping center in Aberdeen	(17/82) 21%
Proximity to Pinehurst Resort and Pinehurst Harness Track	(40/82) 49%
Mix of Commercial and Residential uses	(32/82) 39%
Large, undeveloped parcels	(45/82) 55%
None of the above	(5/82) 6%

2. What are the weaknesses of Pinehurst South, as it exists today? Check all that apply. (Multiple choice)

"Hodgepodge" / "Mishmash" of building types, styles, uses, etc.	(43/82) 52%
Incompatible development which does not reflect the character of the Village	(45/82) 55%
Large, undeveloped parcels	(6/82) 7%
Lack of Open Space and Community Amenities	(28/82) 34%
Lack of Walkability	(55/82) 67%
Lack of access due to the railroad line, to the east of Beulah Hill Rd - NC 5	(28/82) 34%
Traffic on Beulah Hill Rd - NC 5 or elsewhere that affects this area	(70/82) 85%
None of the above	(0/82) 0%

3. What would you like to see (more) of in Pinehurst South? Check all that apply. (Multiple choice)

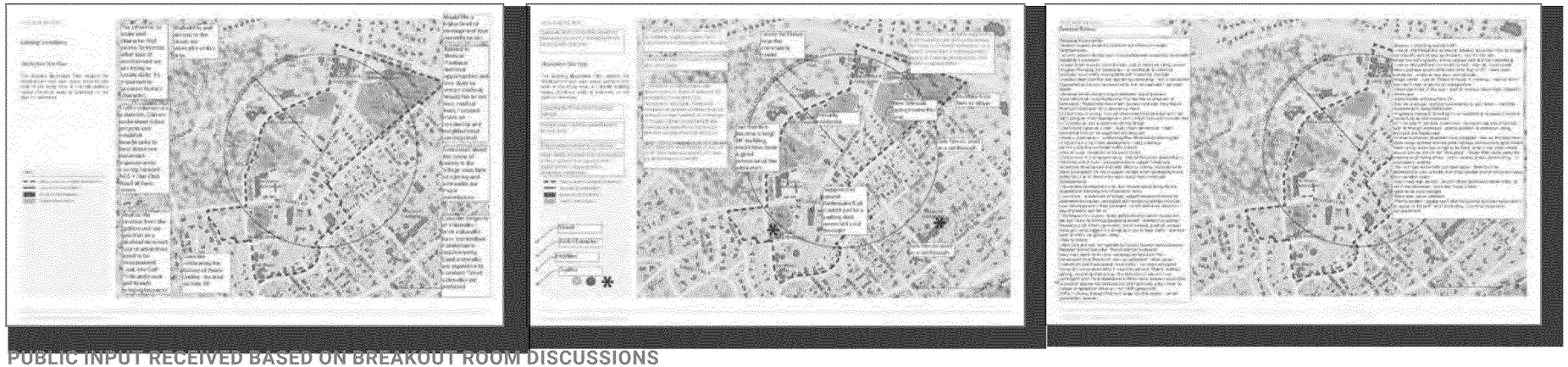
Retail – Neighborhood Goods and Services (grocery, pharmacy, florist, dry cleaner, nail salon, etc.)	(37/82) 45%
Retail – General Merchandise, Apparel, and Furnishings (clothing, electronics, bookstore, home improvement store, etc.)	(35/82) 43%
Restaurants (any type: sit-down, take-out, coffee shop, etc.)	(47/82) 57%
Office – General Office	(37/82) 45%
Office – Medical	(32/82) 39%
Residential – Apartments (for rent)	(19/82) 23%
Residential – Townhouses / Condo (for sale)	(24/82) 29%
Residential – Single-Family Detached houses (for sale)	(12/82) 15%
None of the above	(8/82) 10%

4. What is your favorite or most frequented place to visit within Pinehurst South? Choose one.

US Post Office	(40) 49%
ABC Liquor Store (...it's ok; this survey is anonymous)	(19) 23%
Businesses within the Trotter Hills Office Park	(3) 4%
Quail Haven Retirement Village (pre-COVID)	(0) 0%
Pinehurst Healthcare & Rehabilitation Center (pre-COVID)	(1) 1%
Another business (a professional office, retail, restaurant, etc.)	(10) 12%
A friend's house	(1) 1%
Other	(4) 5%
I do not spend any significant time here	(4) 5%

PUBLIC WORKSHOP 1

The Public Workshop offered the community an opportunity to voice their observations and concerns about the future of Village Place and Pinehurst South. The list below is a compilation of the comments received during Public Workshop 1, as well as additional comments received by staff post workshop. For a full list of comments recorded during Public Workshop 1, please reference the Appendix of this document.



PUBLIC INPUT RECEIVED BASED ON BREAKOUT ROOM DISCUSSIONS

The pages above are examples of notes taken in various Breakout Rooms during the Public Workshop. For a full reference of these comments, please see the Appendix.

Land Use

- Village Place lacks a sense of place and is currently a hodgepodge of uses
- Pinehurst is established as a destination resort for golfers, therefore the needs and desires of visitors should be taken into account as it is a major source of revenue for businesses. Consider amenities or retail options that support these users – i.e. golf related retail
- Desires:
  - A library to be located in this area, particularly across from Village Hall - 2-story building
  - Uses that serve the community; i.e. personal services, neighborhood serving retail, open space, library
  - Live/work or other creative solutions for residential. However, some stakeholders are concerned that apartments above retail currently do not work well in VC (most likely due to parking)
  - Multi-family or townhouses (mixed opinions from stakeholders)
  - There are mixed opinions about restaurants in this area. Some stakeholders feel they are needed, as there is nowhere to go right now, however there is concern for character, competition with the VC and more traffic
  - Village Place would be a good opportunity for retail space if not in competition with VC
  - The uses in this area should complement the VC, be an extension of it and serve the community, not compete with the VC
- Concerns:
  - Apartments may attract residents who are not invested in the community
  - Concern about industrial uses – safety for children, truck traffic
  - The Public Service area is an eyesore, this area would be better as mixed use for the public

Character

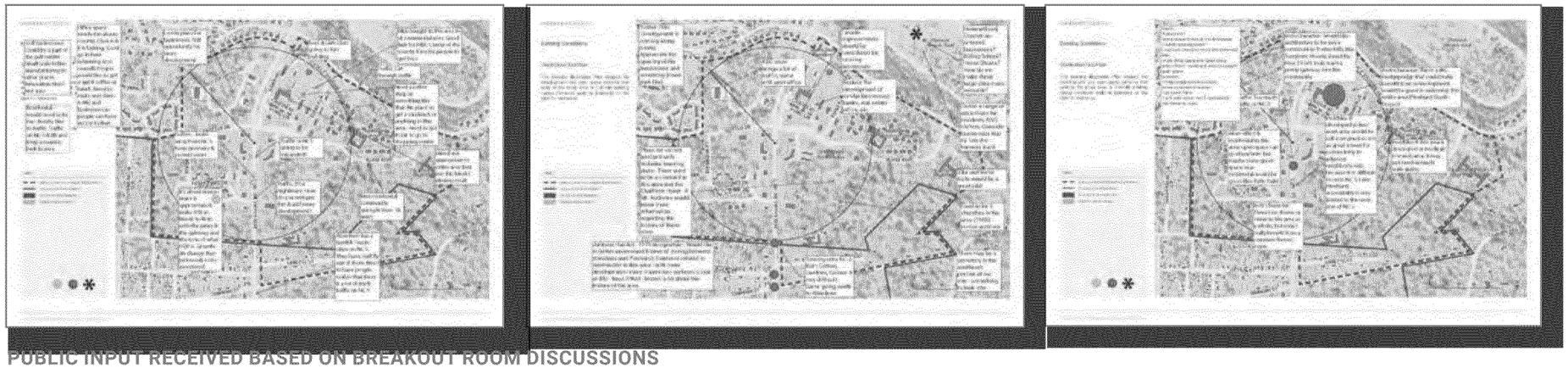
- Village Place lacks an overall plan
- Architecture:
  - Concern for existing uses that do not match the character of VOP, overall the entire area needs better architectural character.
  - Architectural character should blend in with the Village, more traditional
  - Desire for adaptive reuse, not for new construction or cheap construction
  - Maintain scale and character of older single family detached homes, preserve historic character
  - "New England Small Town"
- Landscaping & open space are very important to the character of Pinehurst
- Concern for protecting existing trees
- Some stakeholders believe this area should have no more rental units and no new construction over 2 stories

Transportation

- Need for an independent, professional traffic study
- Overall need for improvement in pedestrian circulation in this area. Pedestrians currently walk but it is not safe. If it were safer, more people (families) would walk between destinations as opposed to drive
  - Connecting to the schools
  - Connecting various open spaces
  - Connecting to VC (residents already bike/walk from here to VC)
  - Paths along Rattlesnake Trail , esp. west side
  - Consider a bike-share program
- Considerations for paths:
  - Consider longevity of sidewalks – brick sidewalks and sand sidewalks require a lot of maintenance - mixed opinions about desired sidewalk material
  - Maintain clay paths where it makes sense in the historic district
  - Consider visual interest along pathways – i.e. buildings that are visually interesting, buildings lining the street
  - Need crosswalks along Rattlesnake, not just at 211
  - Consider use by golf carts
  - Desire for a singular path that links everything together
  - Leverage public/private partnerships to improve sidewalks/trail connectivity
- Traffic is an overall concern in the area, roads are stressed, current infrastructure will not support increase in traffic
  - Pinehurst Brewery is attracting outside traffic. Some stakeholders find this traffic concerning
  - Cut through traffic on the side streets – i.e. Woods Rd, Fields Rd to get to the Village Core
- Rattlesnake Trail
  - There needs to be a better gateway from 211 – although some stakeholders think the opposite, do not want to entice visitors
  - This road should feel like a Pinehurst street, not a commercial street, i.e. improve landscape and streetscape to be consistent with streets in VC
  - Mixed opinions about a cut-through for Rattlesnake – a pedestrian connection would be beneficial, not sure about vehicular
  - Rattlesnake could be a better entrance, a big connector to the hospital as well
- Parking is a major concern:
  - If there is more development, will need even more parking.
  - Parking needs to be convenient and safe
  - Need parking south of McCaskill to support the Brewery, Manor Inn and Village Center parking needs
  - No parallel parking on residential streets, walking paths on every street
  - Opportunity in this area for an aesthetic parking garage
- Concern that widening roads which will displace existing trees
- Extension of Kelly Road could be a good idea if "cleaned up" and leading to a destination

PUBLIC WORKSHOP 1

The Public Workshop offered the community an opportunity to voice their observations and concerns about the future of Village Place and Pinehurst South. The list below is a compilation of the comments received during Public Workshop 1, as well as additional comments received by staff post workshop. For a full list of comments recorded during Public Workshop 1, please reference the Appendix of this document.



PUBLIC INPUT RECEIVED BASED ON BREAKOUT ROOM DISCUSSIONS

The pages above are examples of notes taken in various Breakout Rooms during the Public Workshop. For a full reference of these comments, please see the Appendix.

Land Use

- Development right now is inconsistent
- Strong desire for a public open space in this area
  - Some stakeholders mentioned open space like Tufts Park
  - Build/extend recreational amenities for families in the area
- Low density residential desired by some stakeholders
- Desire for mixed-use:
  - Consider mixed use that disperses traffic, encourages internal circulation
  - This area is currently a bedroom community, needs businesses to help tax base
  - The area between Dawn Rd and Parker Lane is seen as an opportunity for mixed-use, it is missing retail right now. A coffee shop or deli would be great – it is easily accessible
- Office space is needed in Moore County – Class A and B is lacking – which would fit this area. Although some stakeholders noted cautioning too much office space as COVID has altered the need for it and the future of office is undetermined
- Given proximity to Aberdeen, Rt. 1 and the railroad, Light Industrial may be attracted to this area
- Opportunity for retail:
  - Along Gaines street
  - Desire for retail uses along Monticello
  - Some stakeholders would like to see a grocery store in this area, while others are happy to go elsewhere
  - Small scale businesses, golf businesses, golf centers?
- Desire for office space – clinical/research businesses
- The Innovation HUB as planned in the NewCore masterplan does not resonate with some stakeholders, they are confused by this concept and think it is too much development

Character

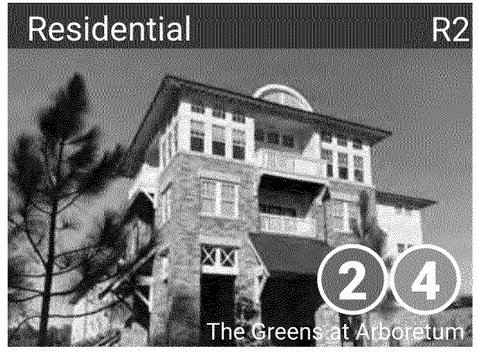
- Pinehurst has numerous neighborhoods that are unique, it is okay to keep them different, but connected to each other
- There is no cohesiveness to character in this area
- Keep country area look
- Trotter Hills coming along nicely, a great opportunity for more development, stakeholders like the park-like setting
- Desire for development like Turnberry Wood
- Landscape:
  - Consider buffers along NC5 – keep greenery and protect the pines, set development back from the road.
- Future development needs to fit in with the pines and the gateway and the tone of VOP – growth and change need to be monitored.
- Consider façade improvements for Existing Businesses near Carter St, future businesses should vary, not be the same types of uses
- Concern about new vinyl sided homes and large homes – not sure they match VOP character
- No chain restaurants, no strip centers
- Reuse existing buildings such as Elmore Furniture

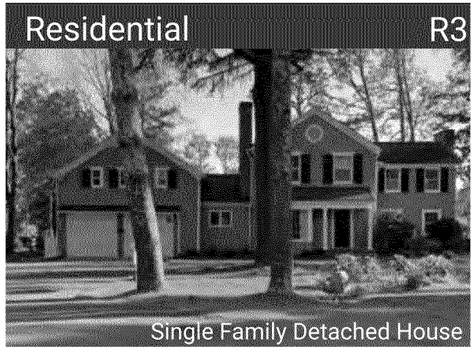
Transportation

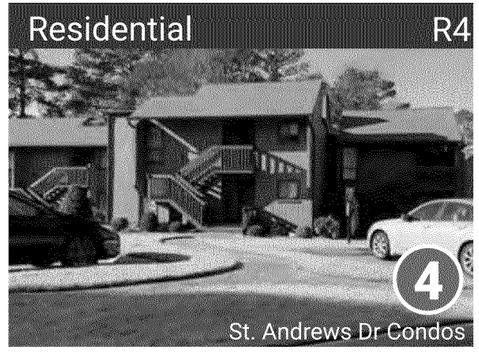
- Need for an independent, professional traffic study
- Pedestrian:
  - Promote pedestrian circulation over vehicular, make more walkable
  - Walking from residences to retail is desired
  - Desire to cross NC5
- Vehicular:
  - Traffic on NC5 is a nightmare, corridor is littered with trash
  - Trucks on NC5 from the Aberdeen landfill are a concern, a lot of truck traffic
  - NC5 intersections of Cotton, Dawkins, Gaines, very difficult turns on both sides
  - Doral Woods exit onto Morganton is very traffic heavy
  - Monticello is used as a cut through
  - The future development off Blake Blvd for 38 homes raises traffic concerns for some stakeholders
  - Residential would need to be low density due to traffic concerns
  - ABC Store and Post Office bring lots of traffic
  - Concern for how to solve traffic, railroad limits widening the roadway.
  - Need for another entrance off Blake Rd past the new liquor store
- Need to connect back to the VC to make this area feel like it is part of VOP, not isolated/disconnected
- Consider bike and horse trails near Pinehurst Rehab Center

ARCHITECTURE



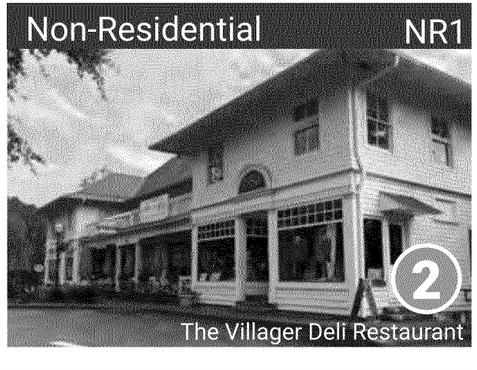


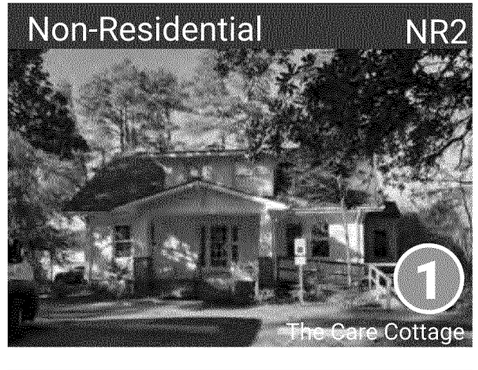


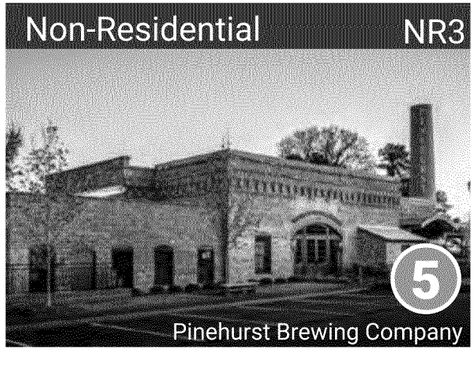




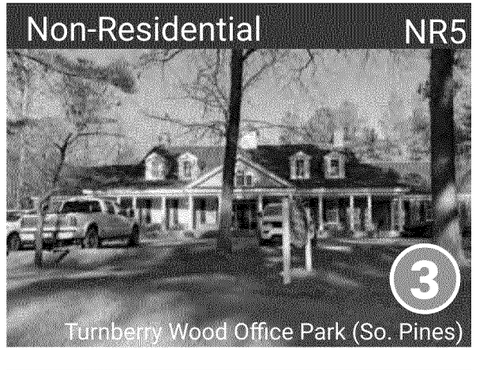
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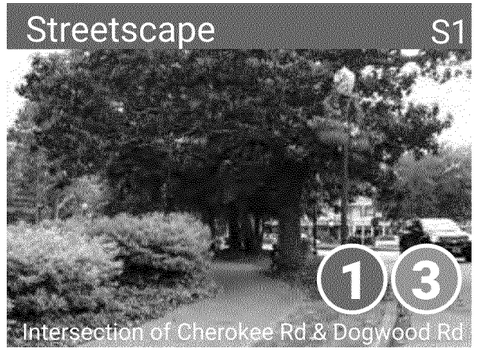






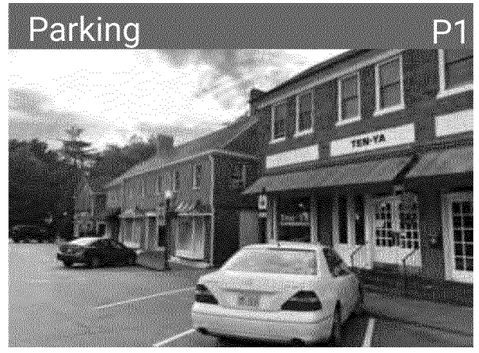


STREETSCAPE/ PARKING



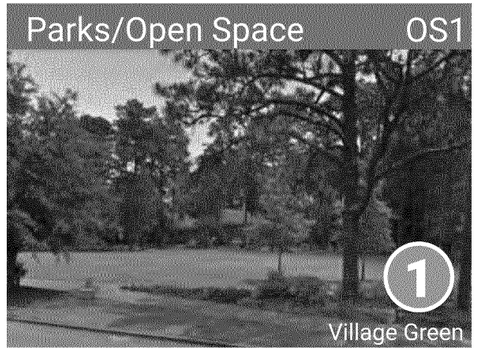


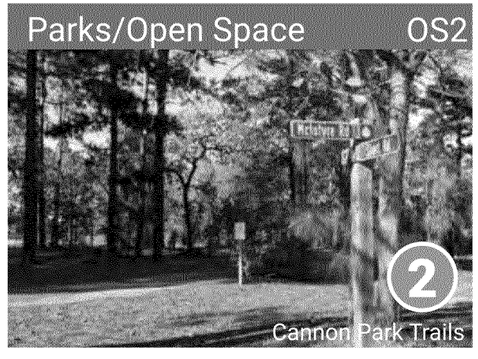


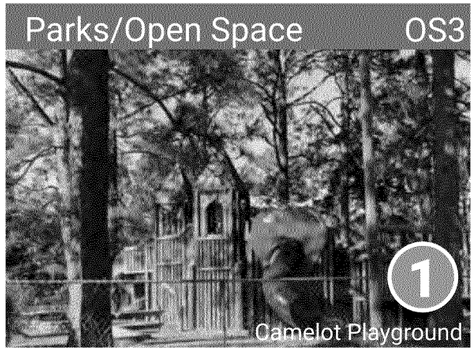


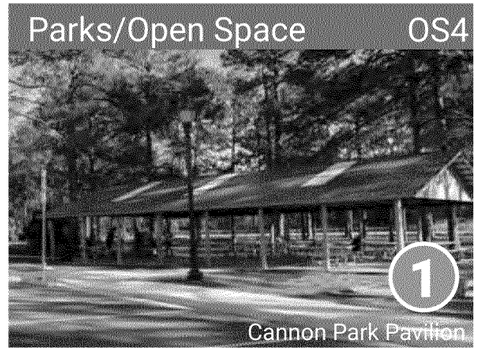


PARKS/ OPEN SPACE











SMALL AREA PLAN PRECEDENTS

PUBLIC INPUT RECEIVED BASED ON BREAKOUT ROOM DISCUSSIONS

The feedback above is a summary of all Breakout Rooms. Participants were encouraged to respond to "like" (green) or "dislike" (red) for each photo.

APPENDIX

The following notes were compiled by the facilitators during the live Public Workshop event on February 11, 2021 and are included for information only.

VILLAGE PLACE

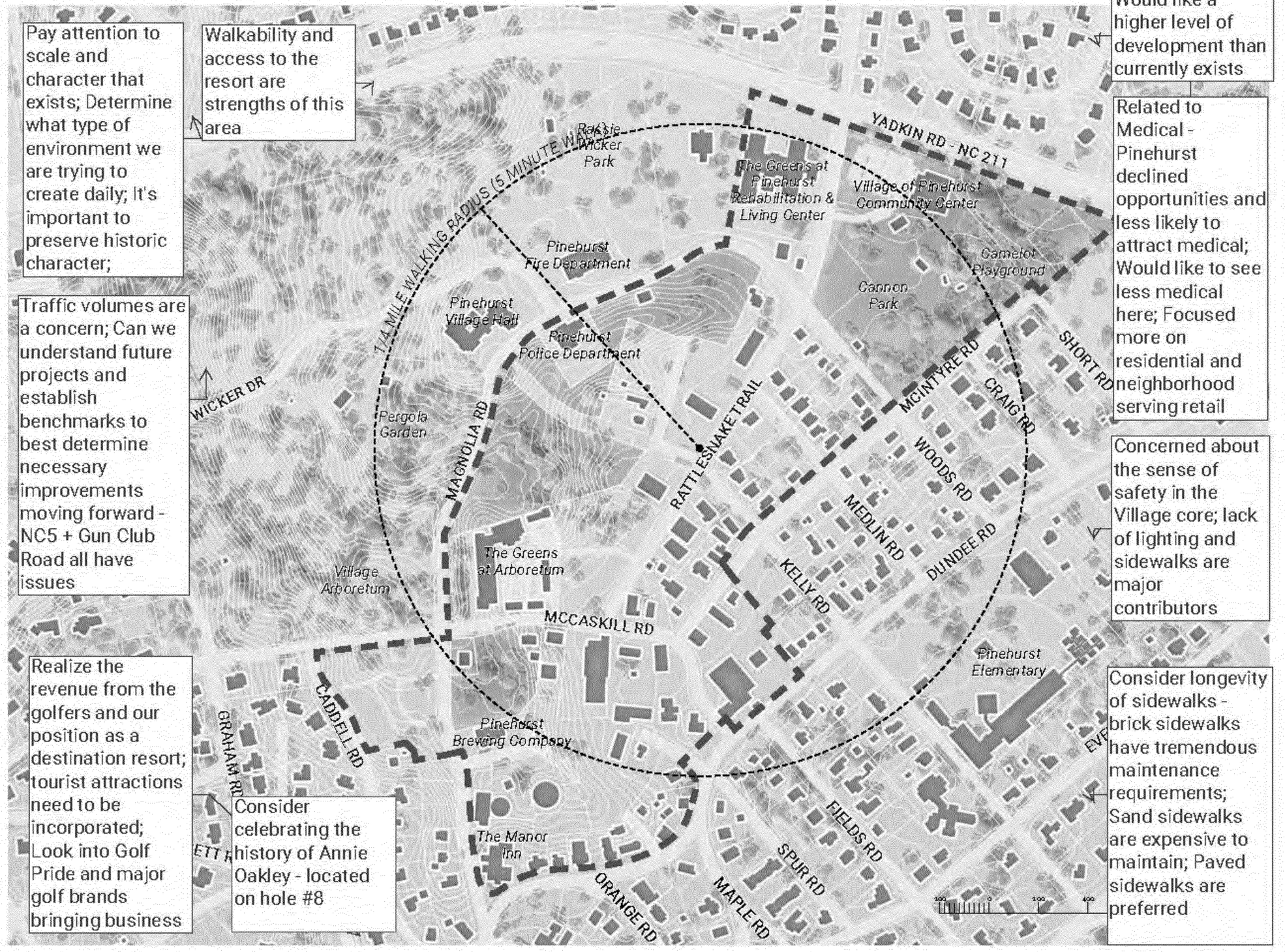
Existing Conditions

Illustrative Site Plan

The Existing Illustrative Plan depicts the development and open space patterns that exist in the study area. A 1/4-mile walking radius (5-minute walk) is indicated on the plan for reference.

KEY

- SMALL AREA PLAN (SAP) BOUNDARY
- VILLAGE OF PINEHURST
- BUILDING FOOTPRINTS
- PARKS/ OPEN SPACE



VILLAGE PLACE NOTES - BREAKOUT ROOM 1

PINEHURST SOUTH

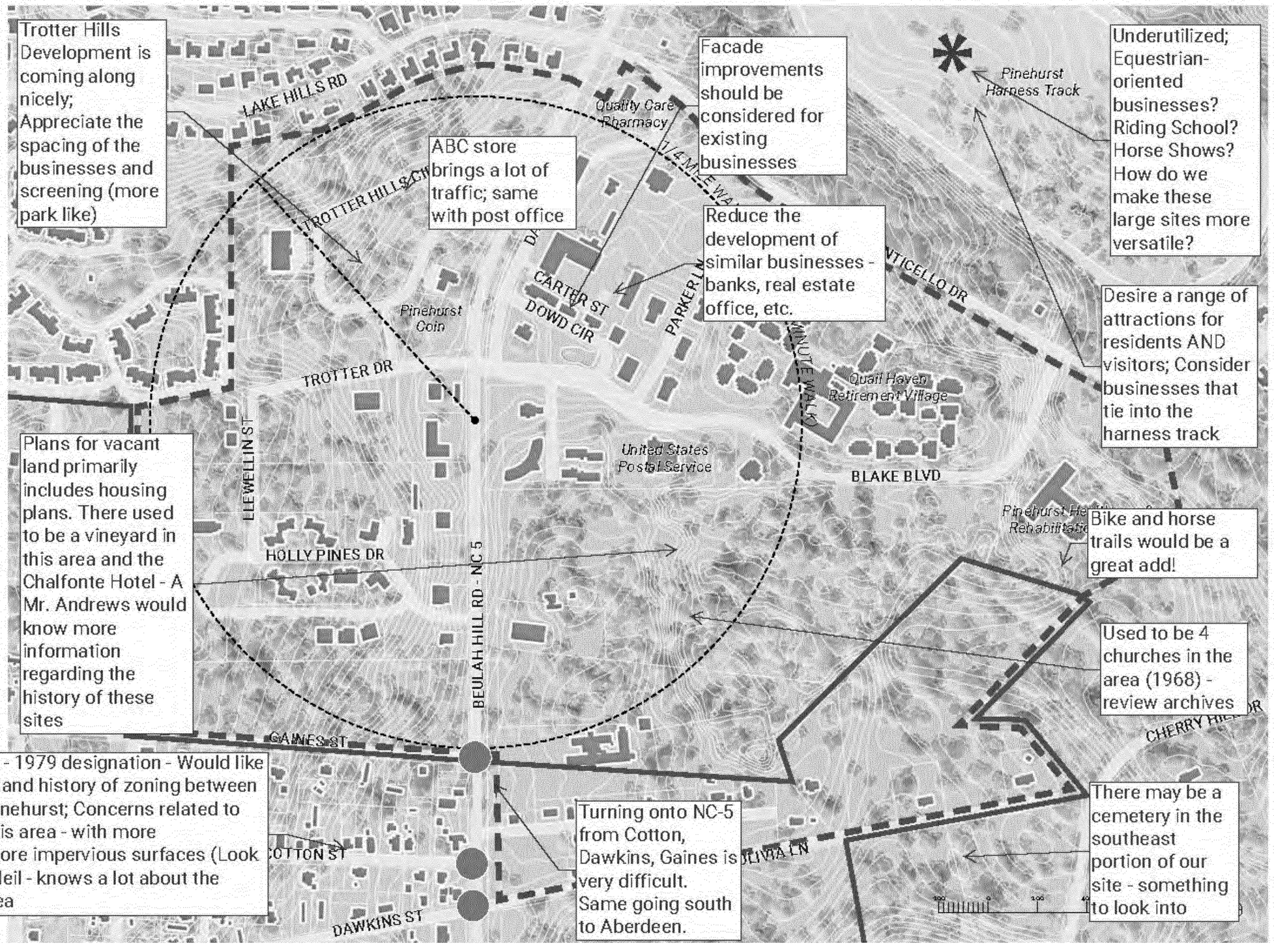
Existing Conditions

Illustrative Site Plan

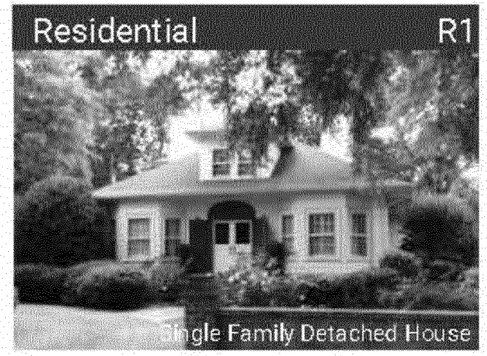
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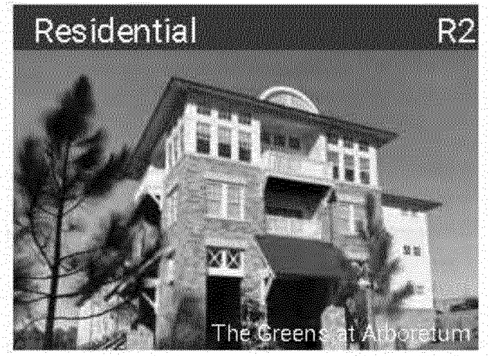
KEY

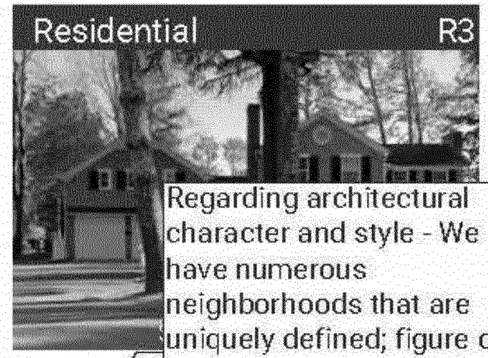
- SMALL AREA PLAN (SAP) BOUNDARY
- VILLAGE OF PINEHURST
- BUILDING FOOTPRINTS
- PARKS/ OPEN SPACE



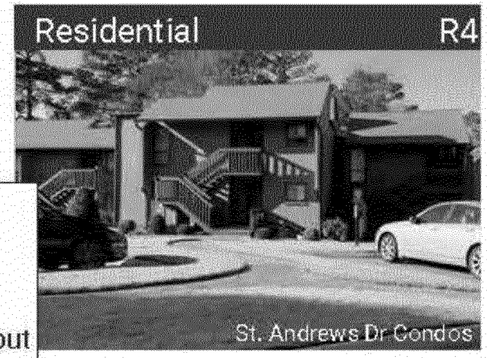
PINEHURST SOUTH NOTES - BREAKOUT ROOM 1

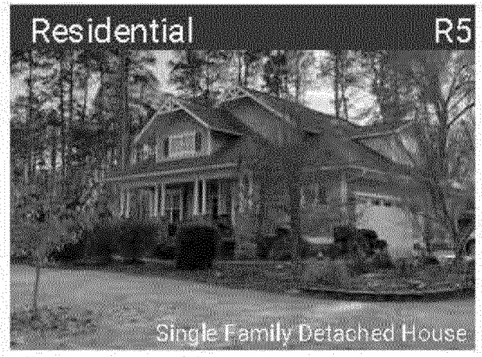




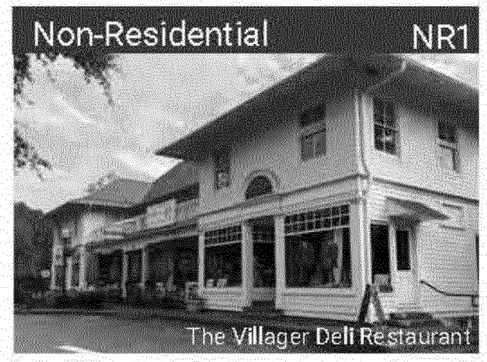


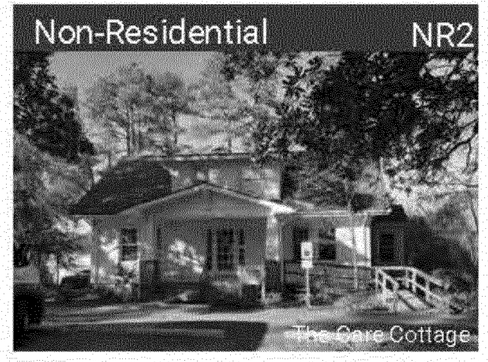
Regarding architectural character and style - We have numerous neighborhoods that are uniquely defined; figure out how to connect them, but keep them differentiated - "we are a mosaic" of neighborhoods

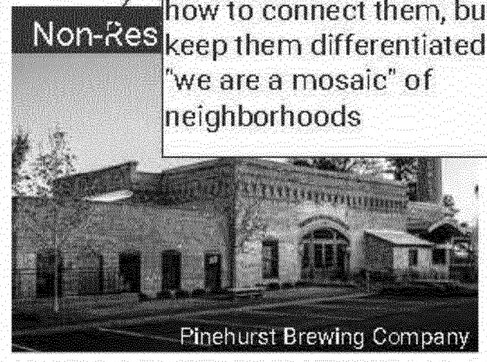


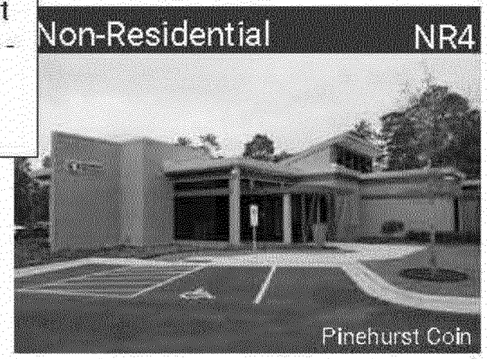


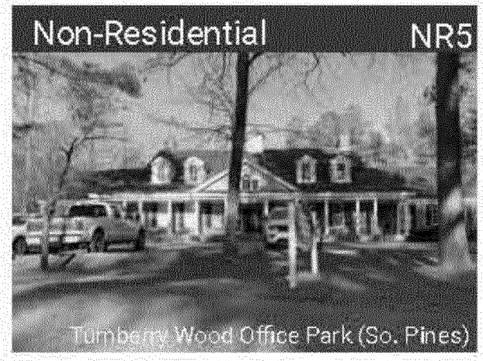
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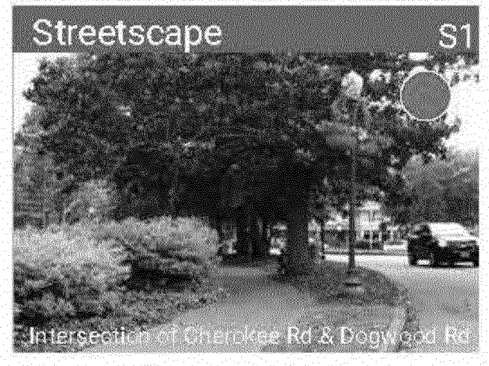


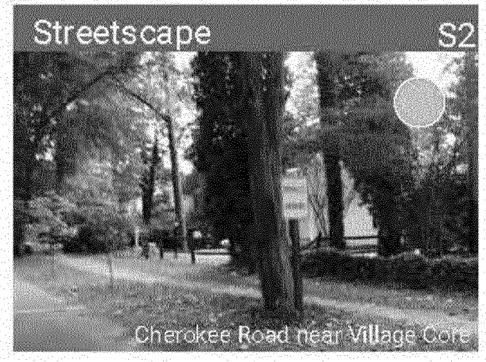




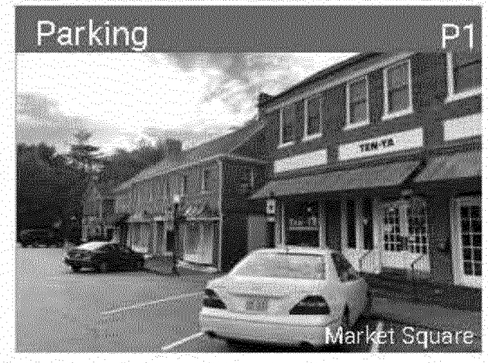


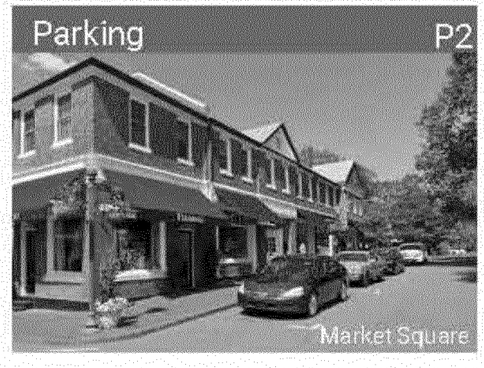
ARCHITECTURE











STREETSCAPE/ PARKING











PARKS/ OPEN SPACE

PRECEDENT NOTES - BREAKOUT ROOM 1

VILLAGE PLACE

Sidewalk from community center to elementary school is funded and will be built later this year

Illustrative Site Plan

The Existing Illustrative Plan depicts the development and open space patterns that exist in the study area. A 1/4-mile walking radius (5-minute walk) is indicated on the plan for reference.

Opportunity for aesthetic parking garage

Village public service department is an eye sore

Fragmented ownership of parcels

Walk-ability problem from elementary school, school is to open in Fall - walking from village acres to pinehurst elementary

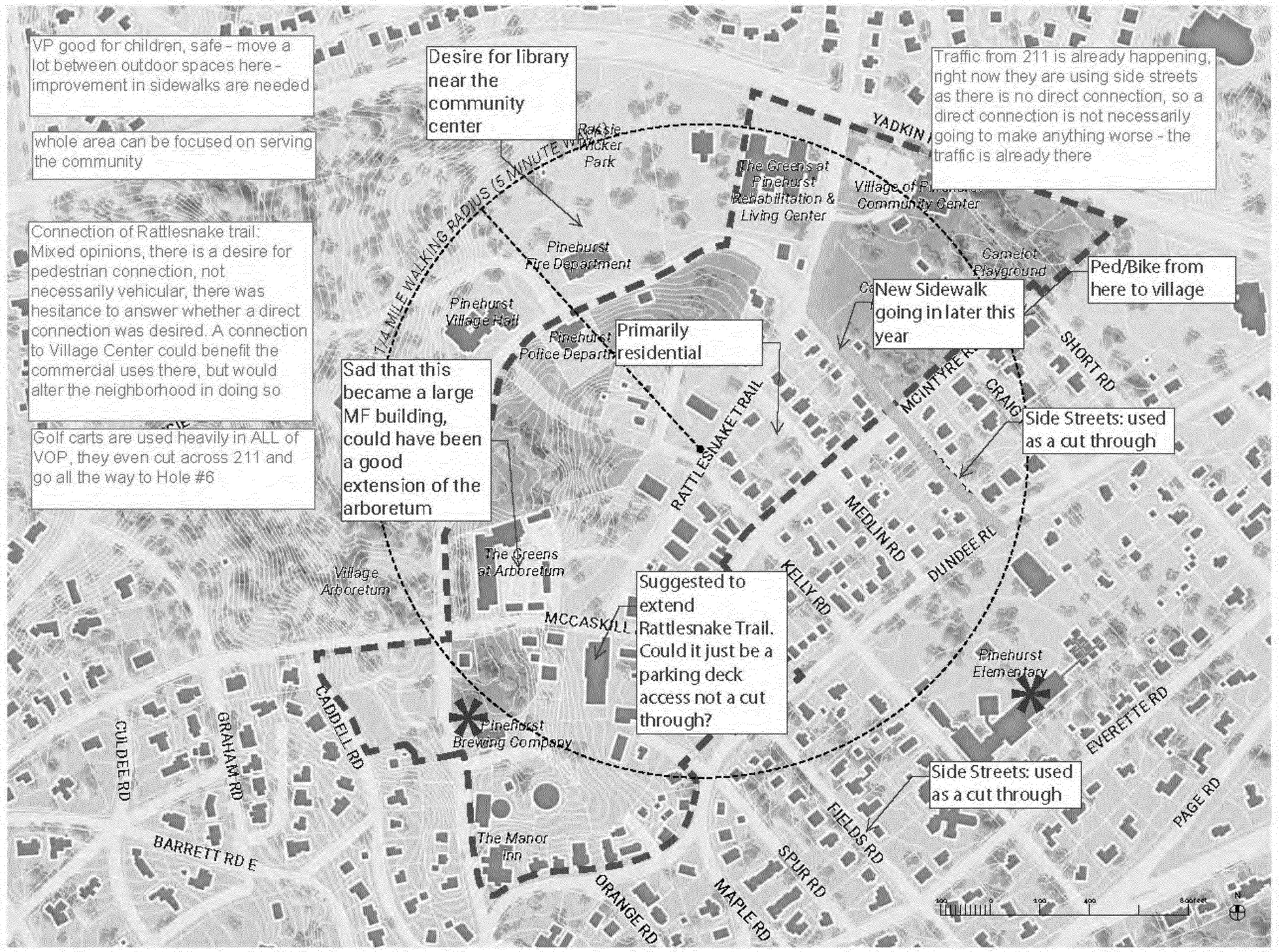
- SMALL AREA PLAN (SAP) BOUNDARY
- VILLAGE OF PINEHURST
- BUILDING FOOTPRINTS
- PARKS/ OPEN SPACE

Street:

Arch Character:

Ped/Bike:

Traffic:



VILLAGE PLACE NOTES - BREAKOUT ROOM 2

PINEHURST SOUTH

Existing Conditions

Illustrative Site Plan

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Street:

KEY

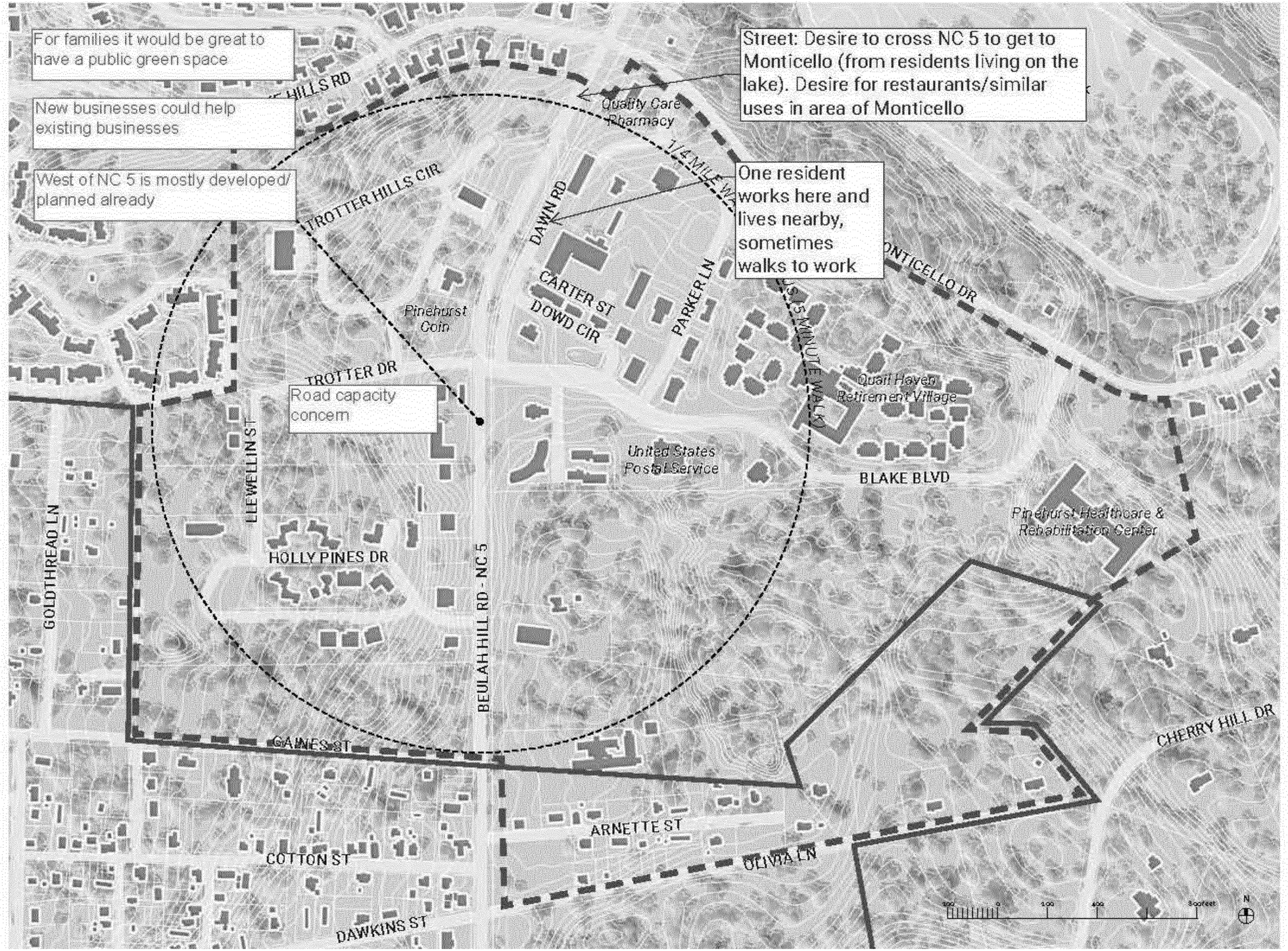
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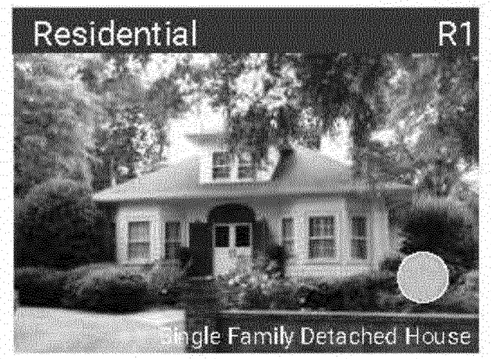
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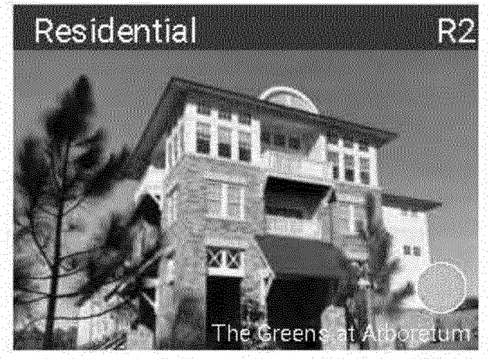
Ped/Bike:

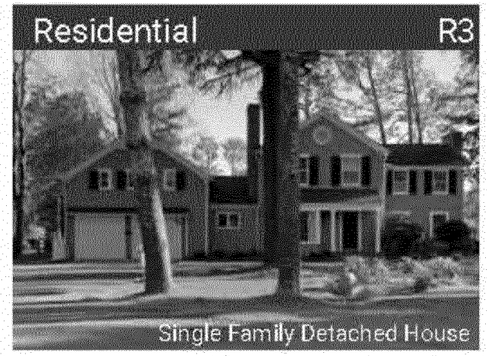
Traffic:

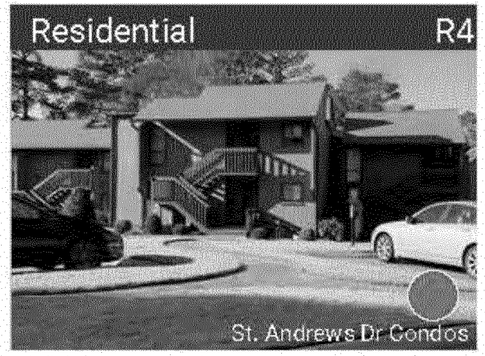


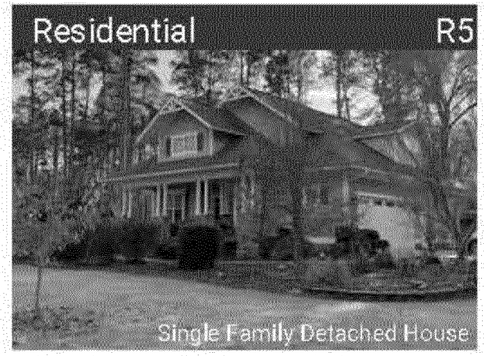
PINEHURST SOUTH NOTES - BREAKOUT ROOM 2



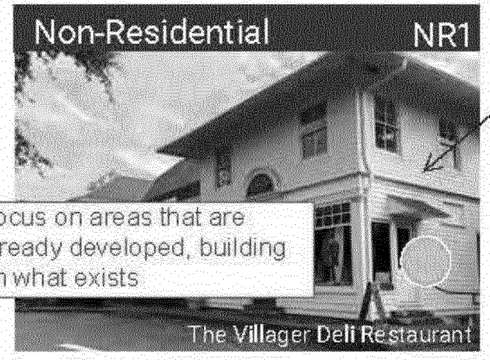


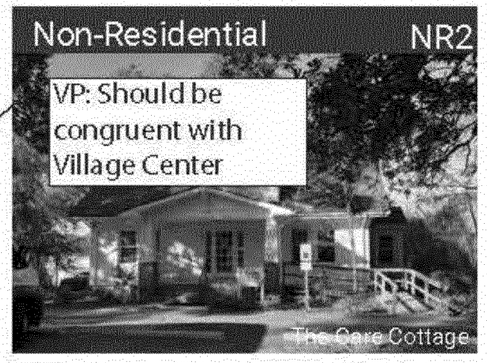


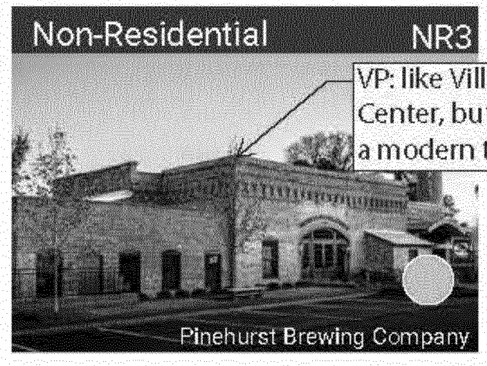


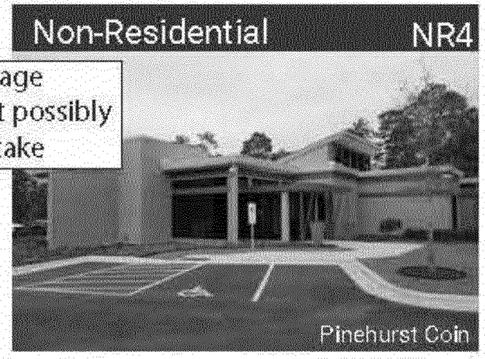


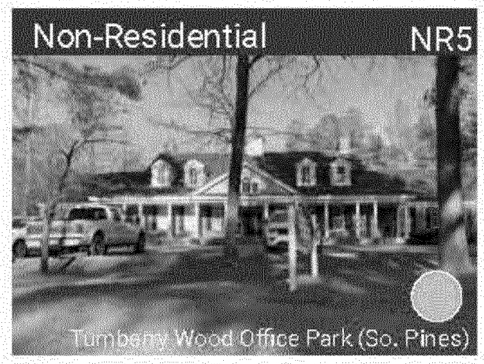
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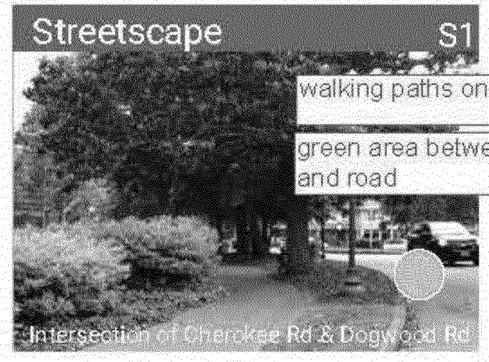


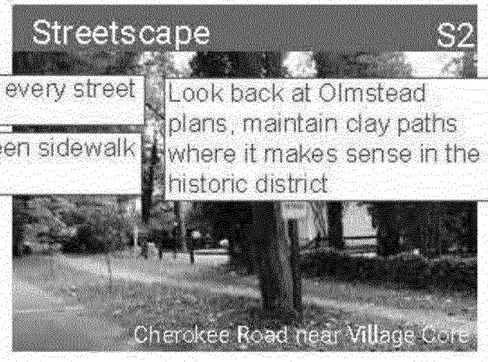




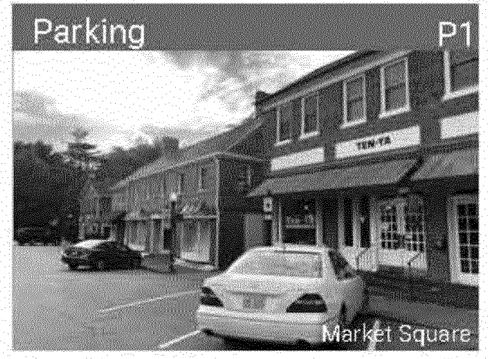


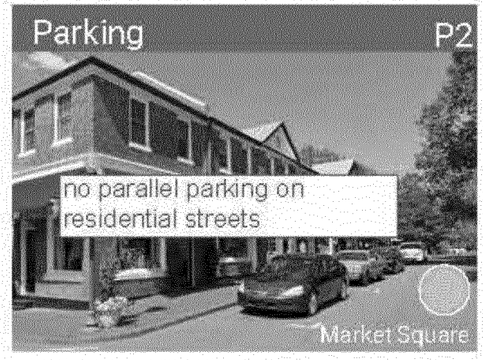
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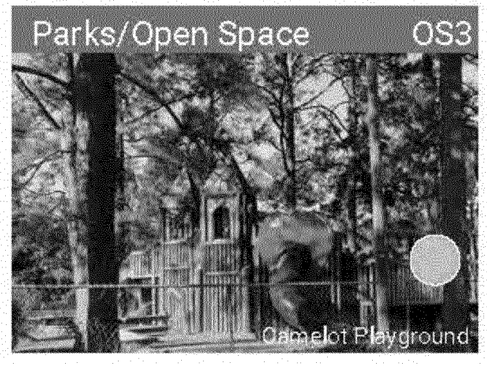




STREETSCAPE/ PARKING











PARKS/ OPEN SPACE

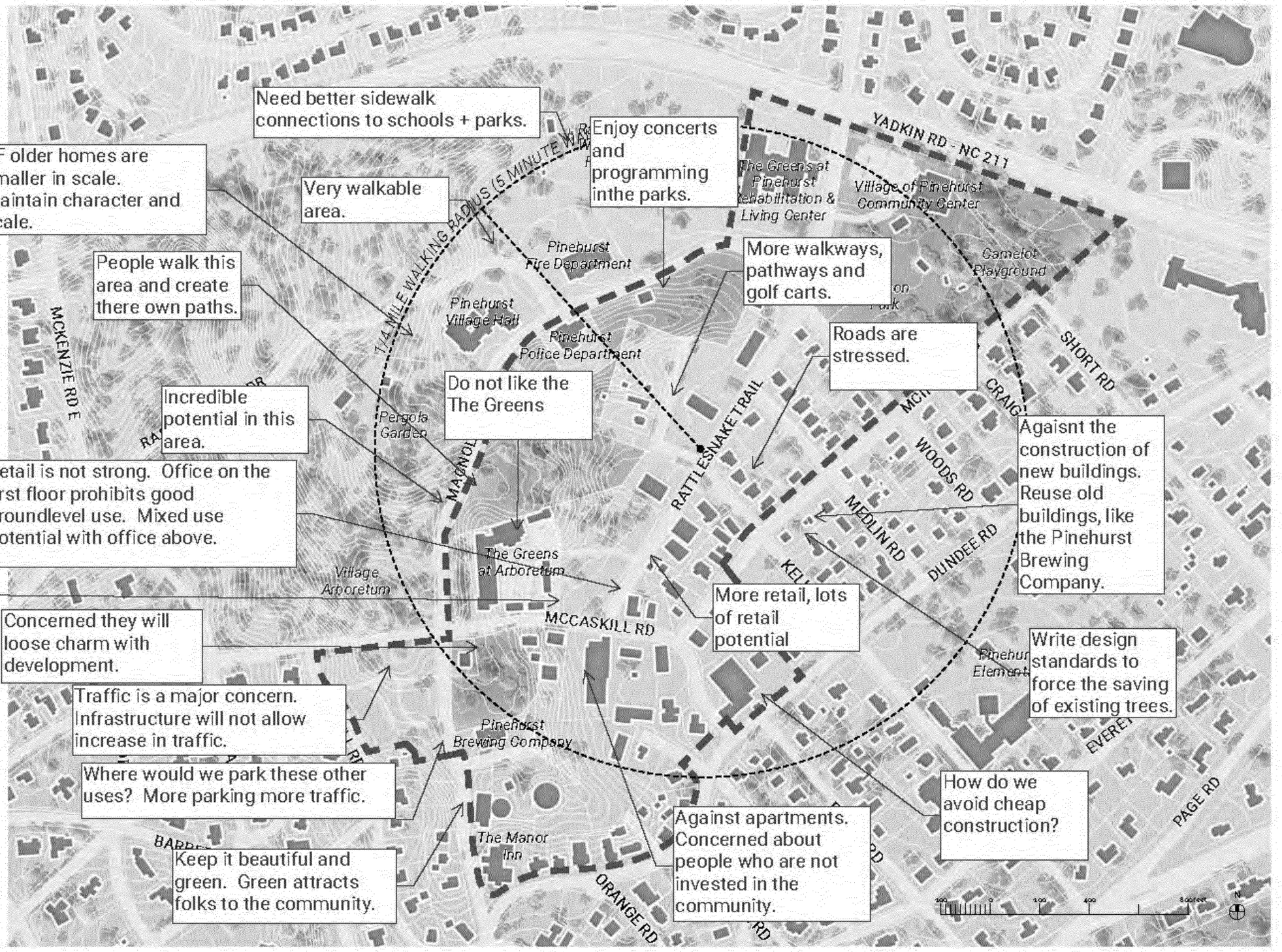
PRECEDENT NOTES - BREAKOUT ROOM 2

VILLAGE PLACE

Existing Conditions

Illustrative Site Plan

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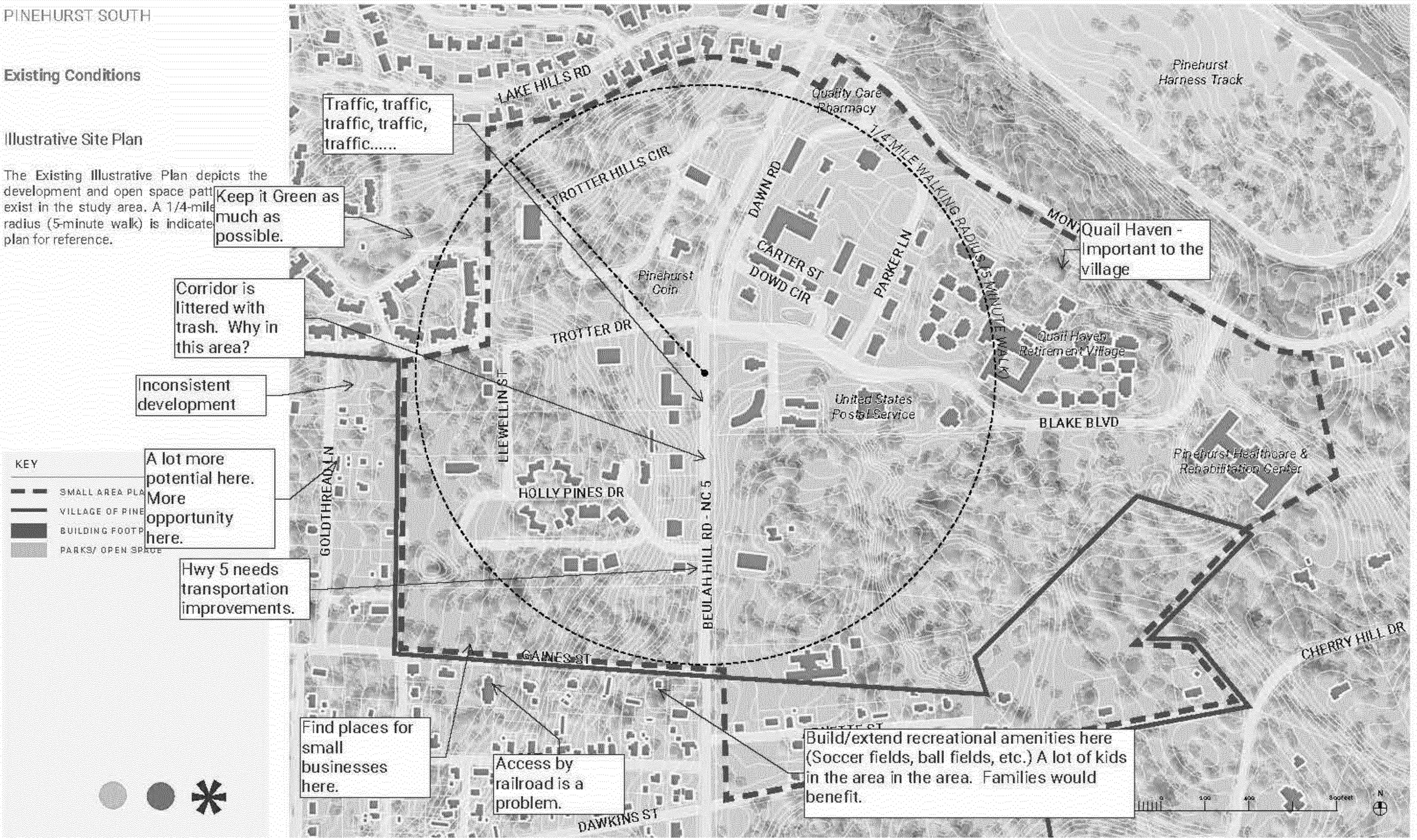
VILLAGE PLACE NOTES - BREAKOUT ROOM 4

PINEHURST SOUTH

Existing Conditions

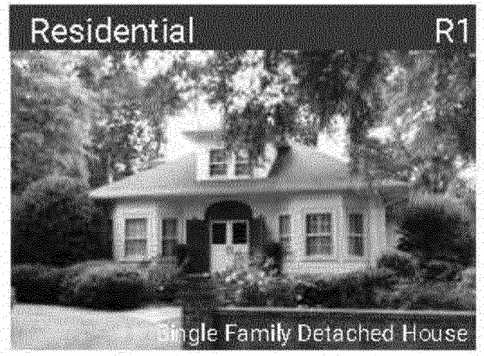
Illustrative Site Plan

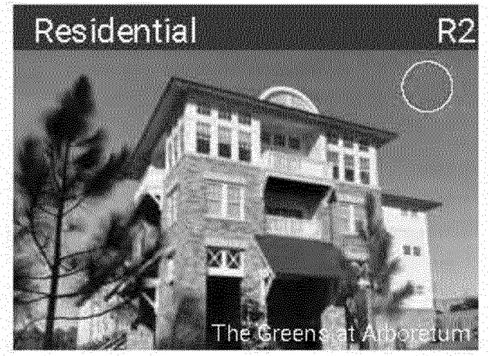
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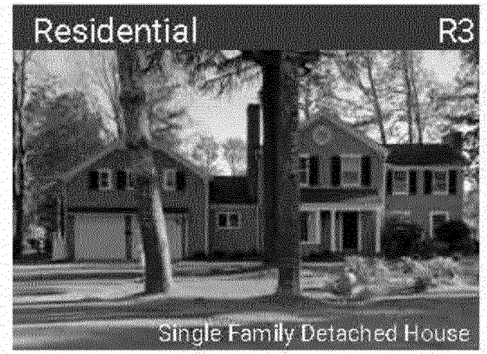


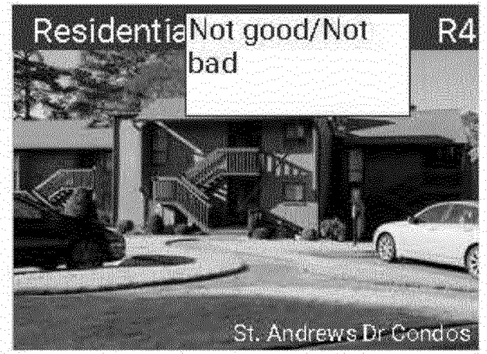
PINEHURST SOUTH NOTES - BREAKOUT ROOM 4

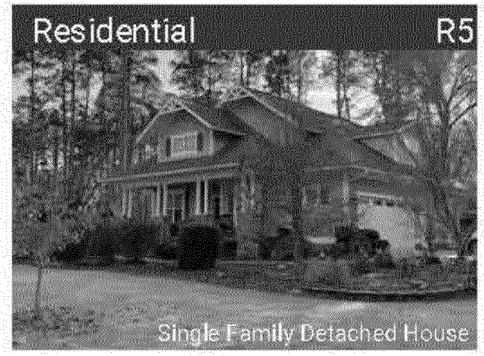
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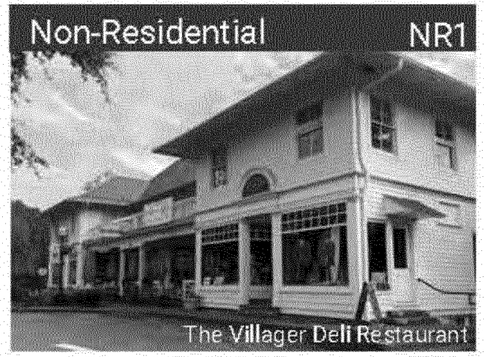


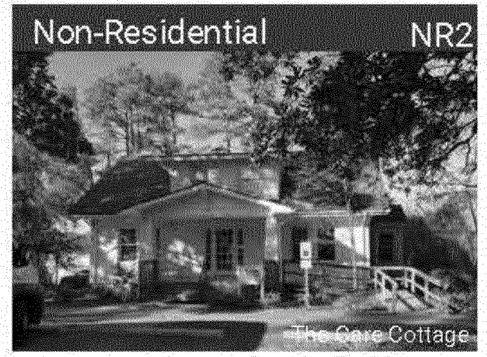


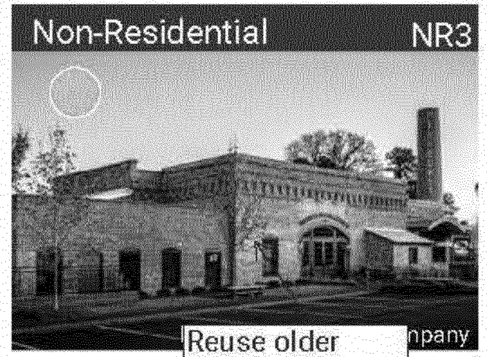


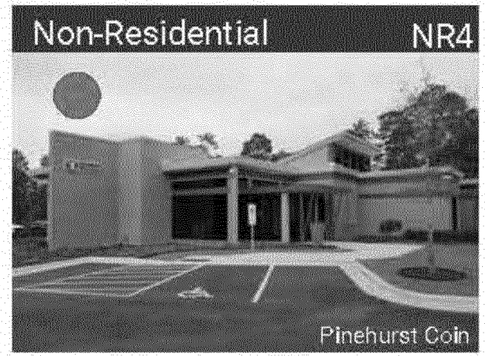


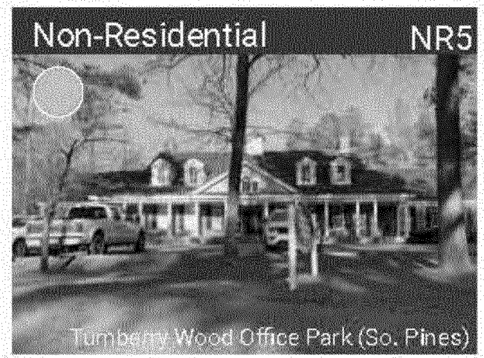
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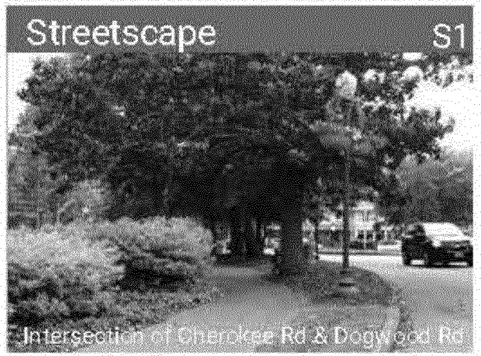


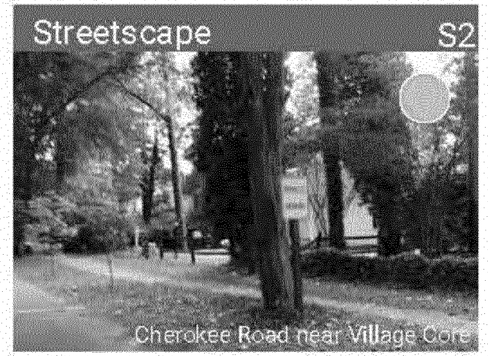


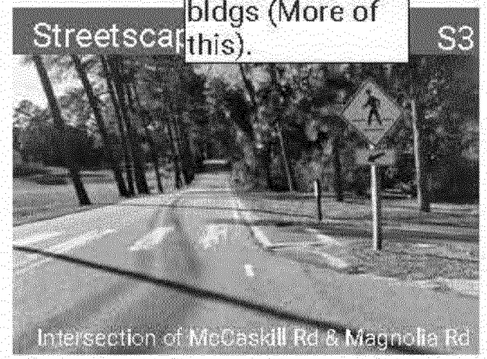




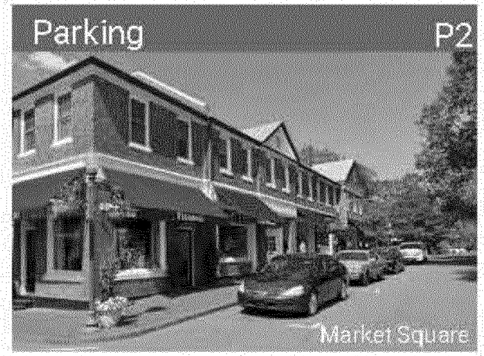
STREETSCAPE/ PARKING





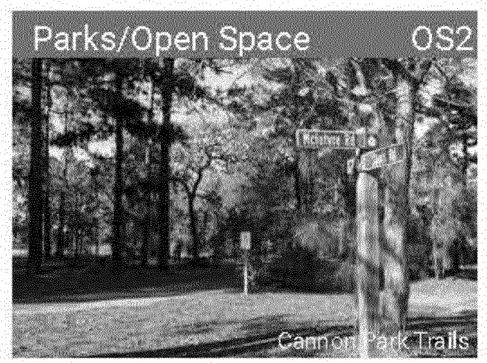






PARKS/ OPEN SPACE











PRECEDENT NOTES - BREAKOUT ROOM 4

VILLAGE PLAC

Q: Is anyone going to be looking into LED and energy efficiency and things like that?

Existing Conditi

Illu

Overall - need better architecture on buildings

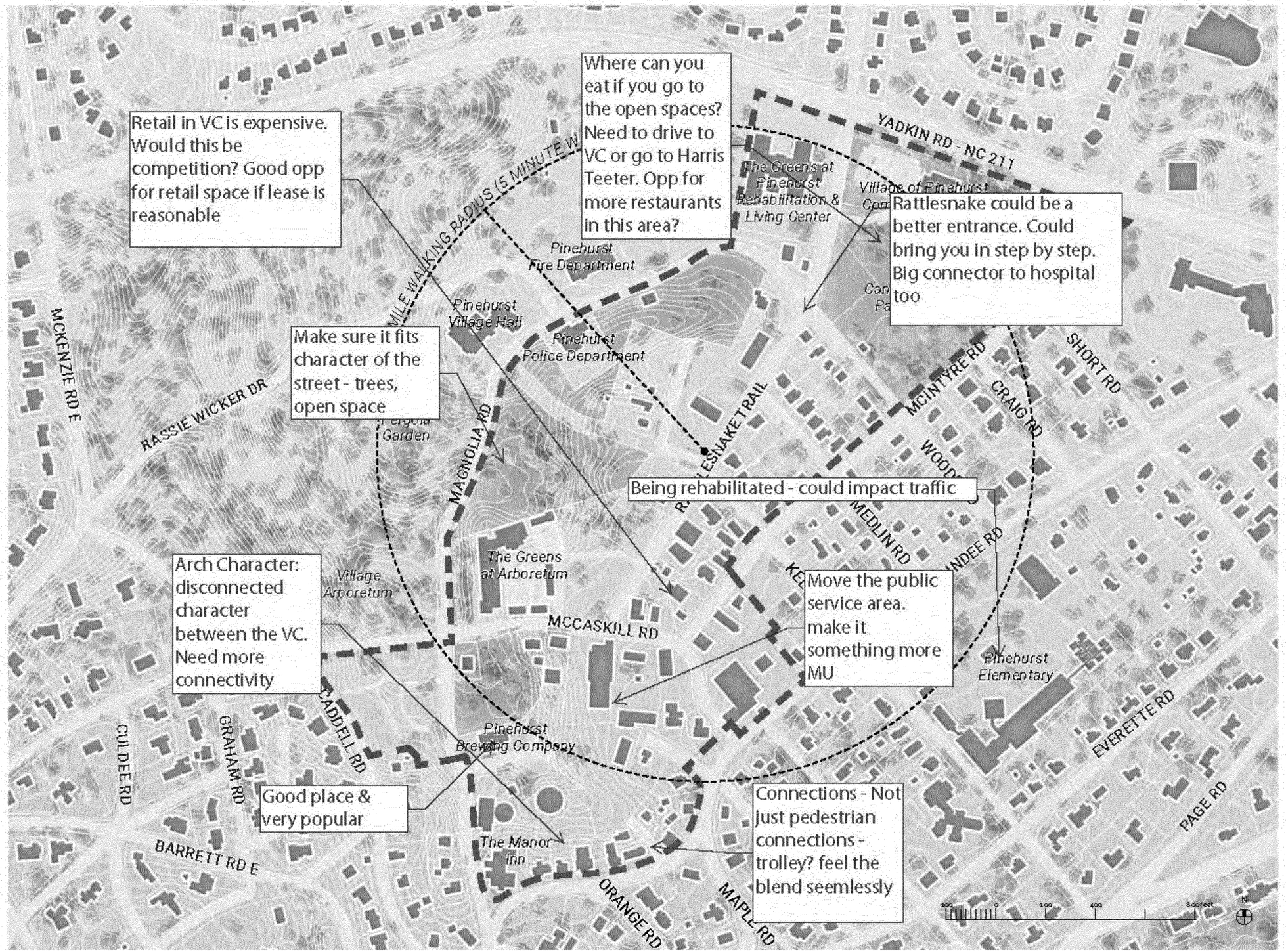
The Plan depicts the dev pace patterns that exis A 1/4-mile walking radius (5-minute walk) is indicated on the plan for reference.

Library location?

Landscaping very important. Architecture very important. have it blend with the Village

KEY

- SMALL AREA PLAN (SAP) BOUNDARY
- VILLAGE OF PINEHURST
- BUILDING FOOTPRINTS
- PARKS/ OPEN SPACE



VILLAGE PLACE NOTES - BREAKOUT ROOM 5

PINEHURST SOUTH

Golf businesses? Could be a part of the golf center. Small scale is fine. Manufacturing in other places. Innovation Hub? Not sure

Office space needed in Moore County. Class A & B is lacking. Good go in here (planning area overall). People would like to get a quick coffee or lunch. Need to make sure there is MU and businesses so people can have access to that

plan for reference.

Residential - would need to be low density due to traffic. Traffic on NC 5 & RR and keep a country look to area

Lovely place for businesses. Still opportunity for more development

Boys & Girls Club going to this building

HBA bought in this area bc of commercial uses. Good hub for HBA. Center of the county. Easy for people to get here

Traffic Cut through traffic

Need a coffee shop or something like that. No place to get a sandwich or anything in this area - need to get in car to go to shopping center

buffers - build away from NC 5. Keep greenery & protect pines

Traffic: Is NC5 going to be expanded?

Mixed-use appropriate in entire area (not just this block). Missing retail

Traffic: it's a nightmare. How do you mitigate this & add more development?

It's about design. Make it appropriate & make it fit in. Needs to fit in with the pines & the gateway and the tone of what VOP is. Growth dn change that - just needs to be monitored

New residential community going in here. 38 units.

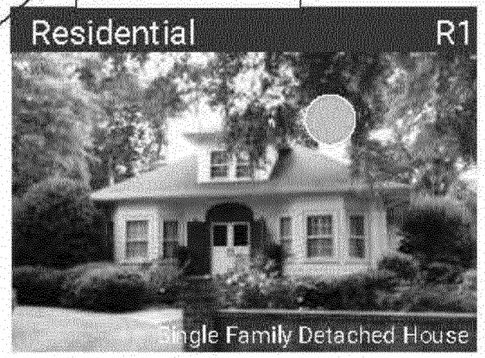
Aberdeen has a landfill. Trucks drive on NC 5. They have stuff fly out of them. Need to have people realize that there is a lot of truck traffic on NC 5

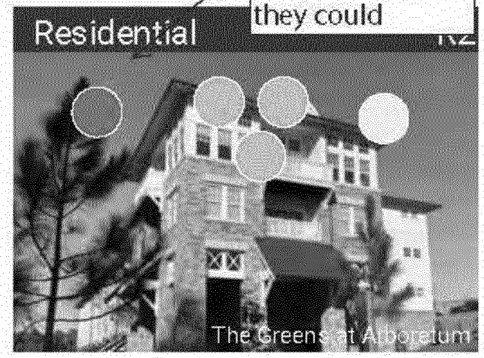
KEY

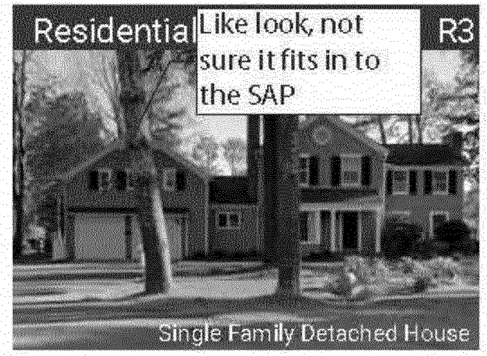
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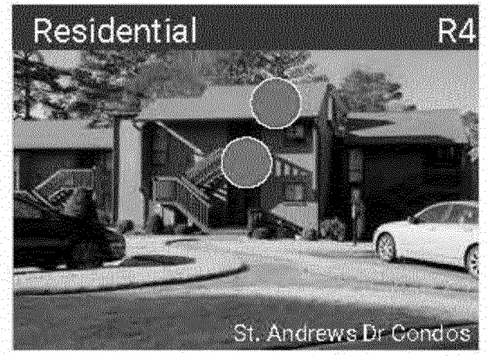
PINEHURST SOUTH NOTES - BREAKOUT ROOM 5

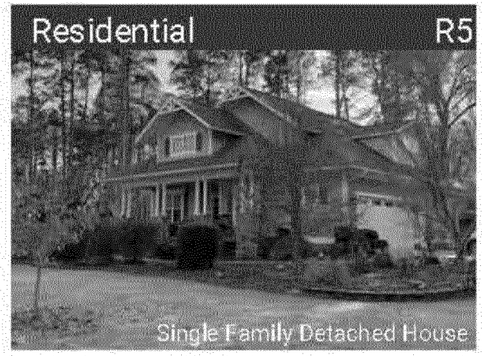
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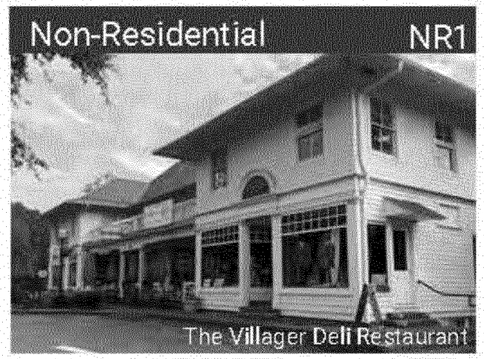


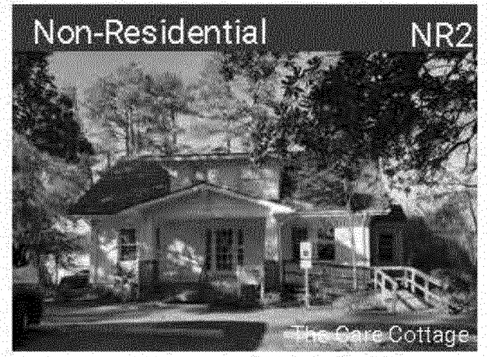


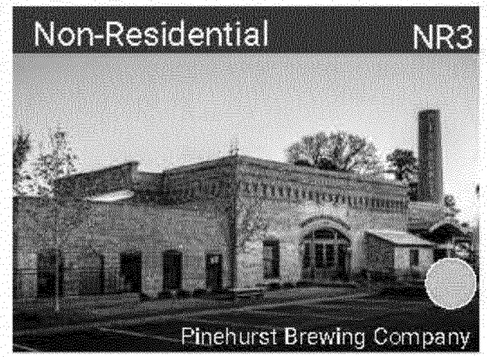




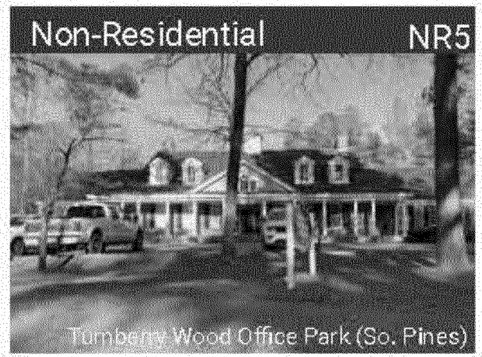
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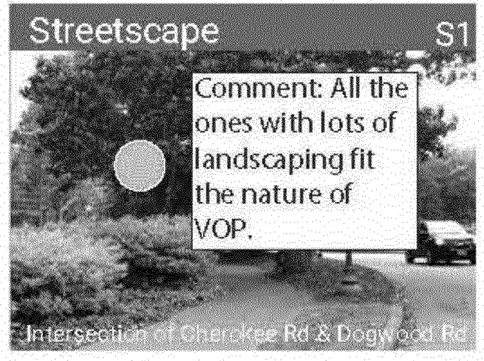


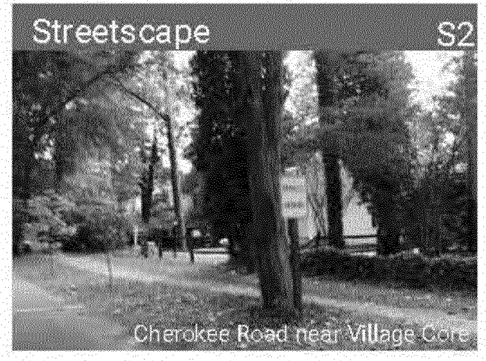




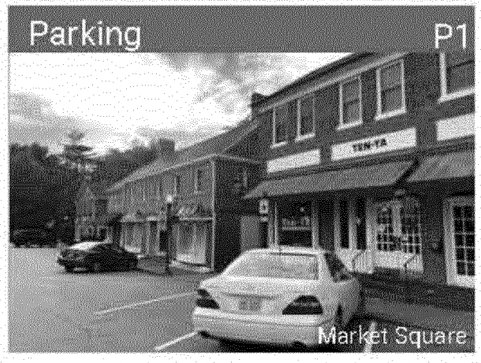


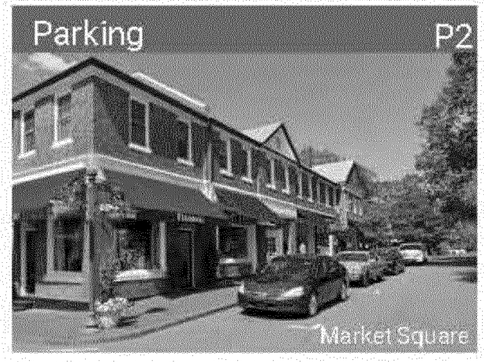
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STREETSCAPE/ PARKING











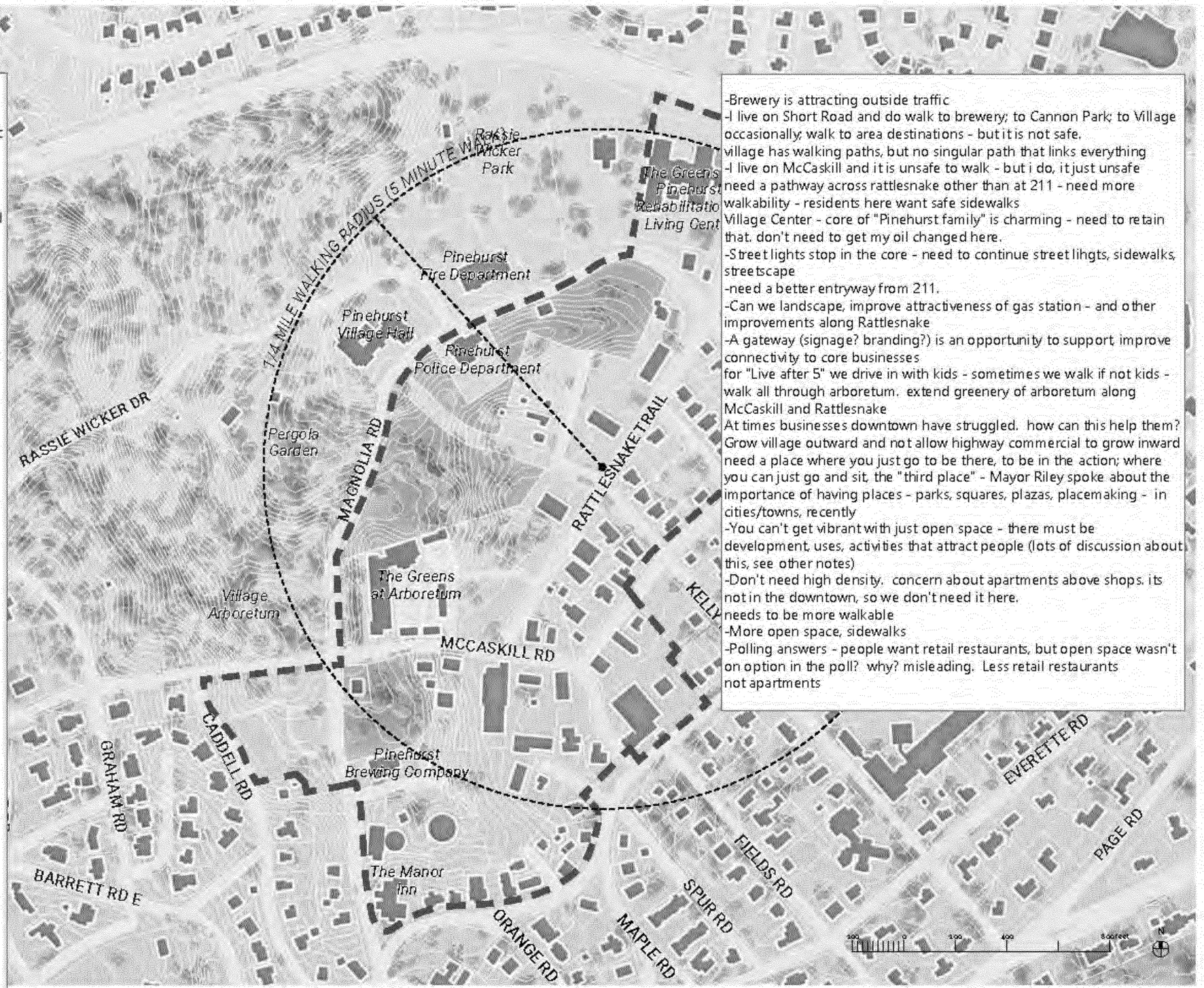
PARKS/ OPEN SPACE

PRECEDENT NOTES - BREAKOUT ROOM 5

VILLAGE PLACE

General Notes:

Following Manning Plan
-protect, respect residential character and children in nearby neighborhoods
-concern about industrial uses, incompatible with residential, truck traffic speeding is a problem
-tractor trailer impacts, cement mixers, kids in street are safety concern
-Hughes Plumbing, Car dealerships - all contribute to industrial character, truck traffic, incompatible with residential character
-Previous New Core Plan was rejected by community - this is not desired (supported by Council, not community, and not executed - see notes below)
-whatever we do should not put downtown out of business
more vibrant will make Rattlesnake Trail feel like an extension of downtown - Rattlesnake should feel, function, and look like a typical Pinehurst street and not a commercial street
-Critical mass is lacking - but not necessarily more development. not advocating for more development, but a critical mass and character that is respectful of, and an extension of, the Village
-Don't want a plan on a shelf - need a fresh perspective - need something that can be supported and executed
-Need a cohesiveness - ie Manning Plan, What would Manning do?
-Critical mass is not more development - need a balance
do it in a way that minimizes traffic impacts
-Human scale - respectful of the past, history
-Critical mass in a congruent sense - (lots of discussion about what is meant by critical mass - some participants support mixed-use, reasonable development that adds vibrancy, activity, character while some participants are not in support of (too much) development and prefer focus to be about more open space, trails, landscape improvements)
-Reasonable development is ok, but its more about being vibrant, respectful of Manning, fits in Pinehurst Family
- continuity - ie extension of Village, supportive/complimentary to downtown businesses, compatible with nearby residential character uses /development is likely inevitable - so lets define our destiny in a way that works best for us.
- Development is a given so lets define what we want it to look like we don't want to continue paralyzing ourself - brewery has pushed boundary a bit; it feels connected. great example, proof of concept. although, some suggest it is bringing in out-of-town traffic - and only adds to traffic, congestion, safety
-Bow to history
-New Core plan was not rejected by Council, but was never executed. Adopted but not executed. Market did not materialize.
want more depth to this plan compared to New Core Plan -
do we want it like Pinehurst? low key residential? some say yes.
-vibrant will add more people, more traffic - not necessarily good. (some discussion about what is meant by vibrancy. People, walking, talking, socializing, interacting - this definition of vibrant is not contingent upon more development. While some believe a reasonable amount of appropriate development (the right uses, scale, similar to village) is needed for vibrancy - not 100% agreement)
traffic is coming through Pinehurst to get to other places - can we prevent this, reroute?



-Brewery is attracting outside traffic
-I live on Short Road and do walk to brewery; to Cannon Park; to Village occasionally; walk to area destinations - but it is not safe.
village has walking paths, but no singular path that links everything
-I live on McCaskill and it is unsafe to walk - but i do, it just unsafe
need a pathway across rattlesnake other than at 211 - need more walkability - residents here want safe sidewalks
Village Center - core of "Pinehurst family" is charming - need to retain that. don't need to get my oil changed here.
-Street lights stop in the core - need to continue street lihgts, sidewalks, streetscape
-need a better entryway from 211.
-Can we landscape, improve attractiveness of gas station - and other improvements along Rattlesnake
-A gateway (signage? branding?) is an opportunity to support, improve connectivity to core businesses
for "Live after 5" we drive in with kids - sometimes we walk if not kids - walk all through arboretum. extend greenery of arboretum along McCaskill and Rattlesnake
At times businesses downtown have struggled. how can this help them?
Grow village outward and not allow highway commercial to grow inward
need a place where you just go to be there, to be in the action; where you can just go and sit, the "third place" - Mayor Riley spoke about the importance of having places - parks, squares, plazas, placemaking - in cities/towns, recently
-You can't get vibrant with just open space - there must be development, uses, activities that attract people (lots of discussion about this, see other notes)
-Don't need high density. concern about apartments above shops. its not in the downtown, so we don't need it here.
needs to be more walkable
-More open space, sidewalks
-Polling answers - people want retail restaurants, but open space wasn't on option in the poll? why? misleading. Less retail restaurants
not apartments

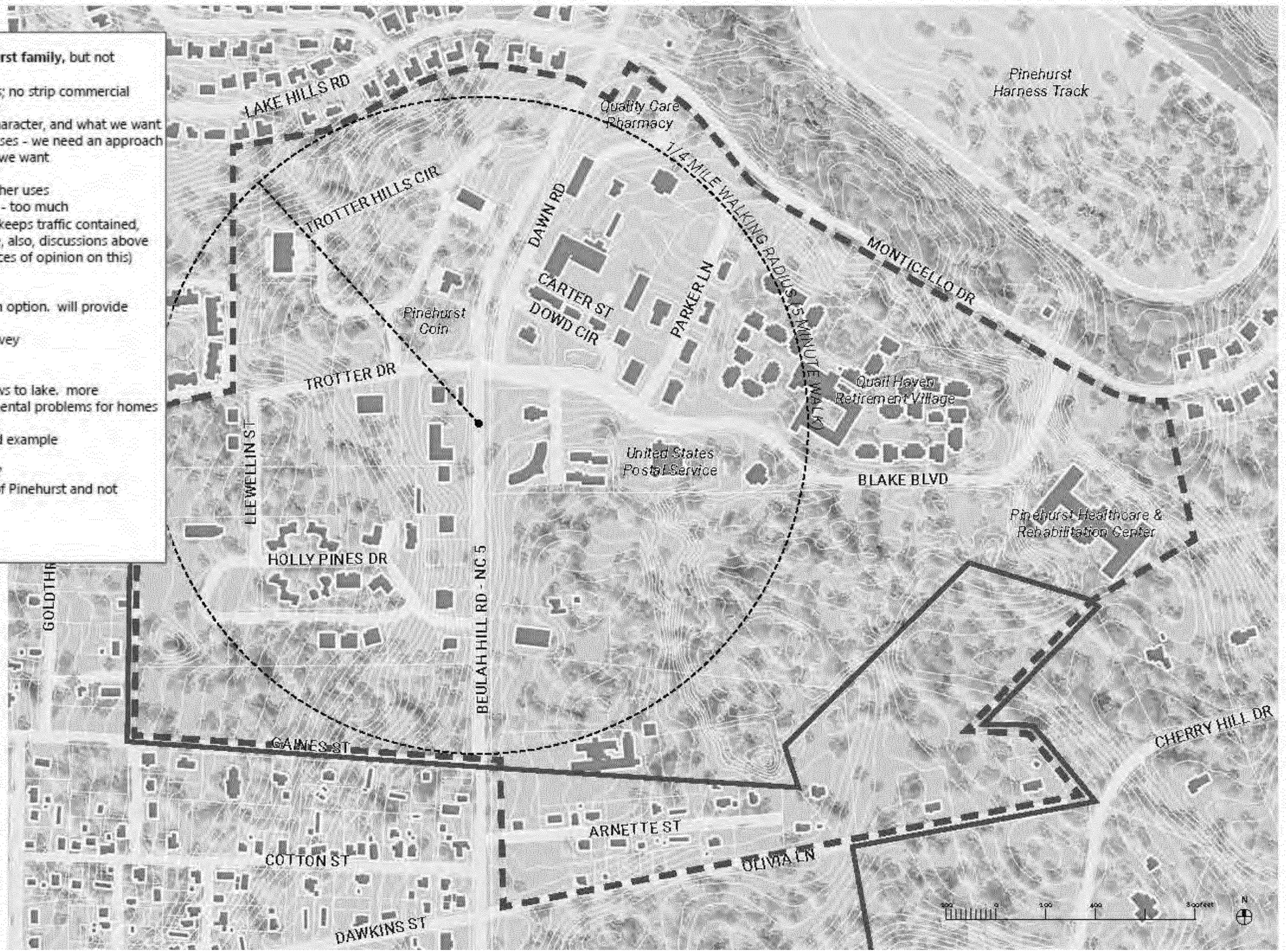
VILLAGE PLACE NOTES - BREAKOUT ROOM 3

PINEHURST SOUTH

-I live off Monticello
should still respect Manning Plan and **fit in Pinehurst family,** but not necessarily as literal - the spirit of manning
-Not Broadview Heights, Ohio, no chain restaurants; no strip commercial
-Needs vibrancy, people outside talking socializing;
-Form Based Code will guide qualitative aspects, character, and what we want and not simply how much stuff or the quantity of uses - we need an approach that defines and guides change to be exactly what we want
-more development will only add to traffic along 5
-RR is a constraint; impact and limit to retail and other uses
-40 more homes on Blake Blvd - 80 cars is an issue - too much
-need to consider mixed-use that disperses traffic, keeps traffic contained, encourages internal circulation, reduces # trips (see, also, discussions above about development, mixed-use, vibrancy - differences of opinion on this)
-promote ped - reduce cars
-need dedicated public open space
-concern that survey did not have open space as an option. will provide misleading answers.
-no one looking at qualitative considerations in survey
-more open space
-need more walkability
-concern about development, erosion, esp as it flows to lake. more development here is causing erosion and environmental problems for homes down towards the lake
-do something like Turnberry Wood - this is a good example
-Open Space
-how can we make Pinehurst South more walkable?
-Need to improve connectivity so it feels like part of Pinehurst and not isolated or disconnected

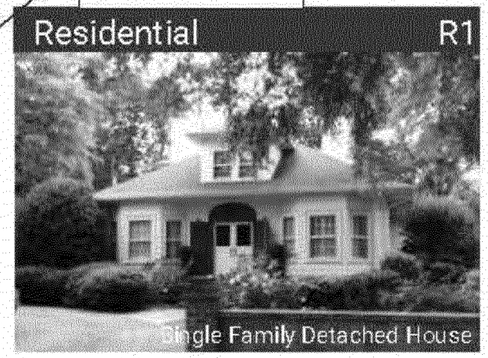
VILLAGE OF PINEHURST
BUILDING FOOTPRINTS
PARKS/ OPEN SPACE

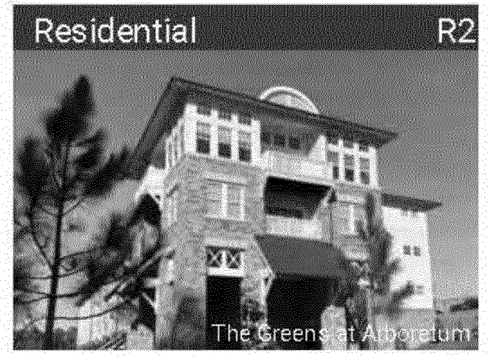
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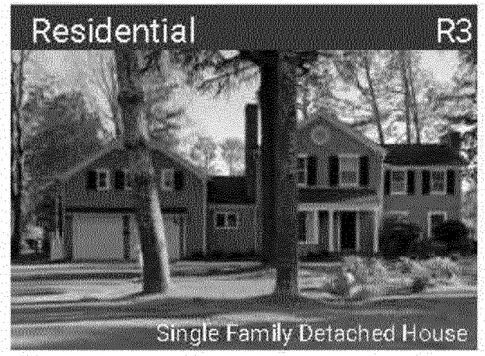


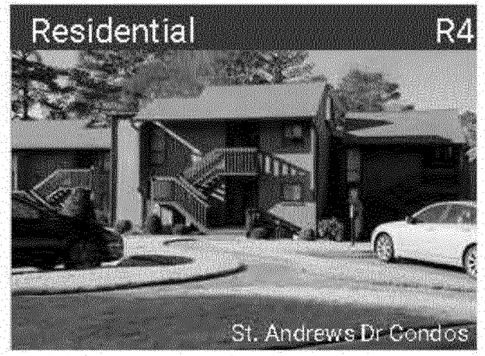
PINEHURST SOUTH NOTES - BREAKOUT ROOM 3

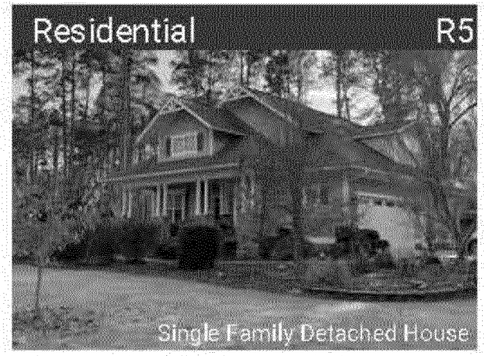
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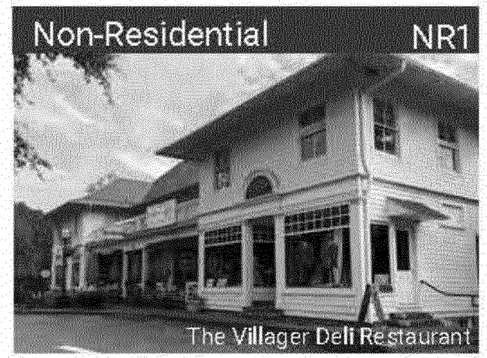


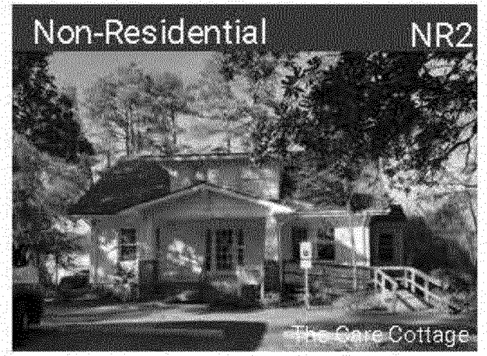


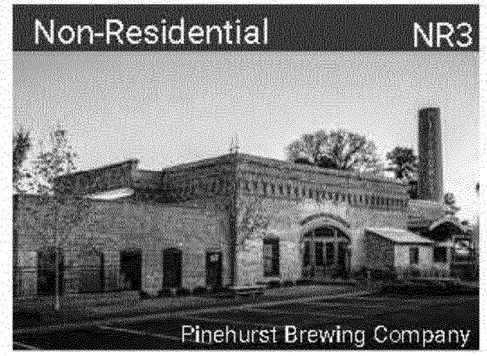


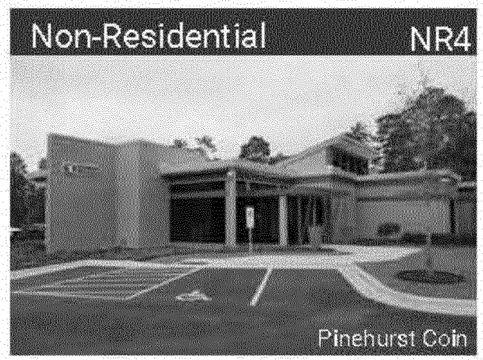


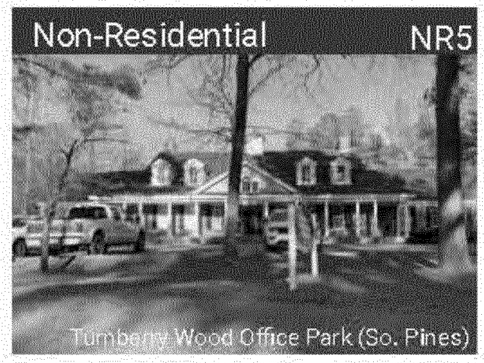
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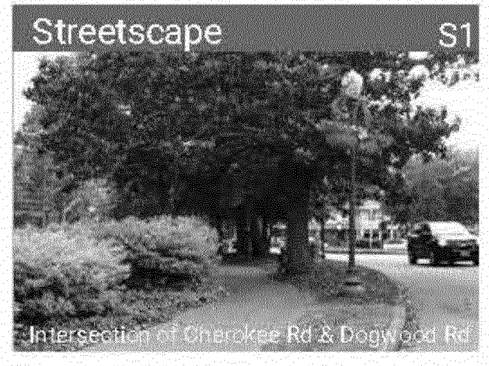


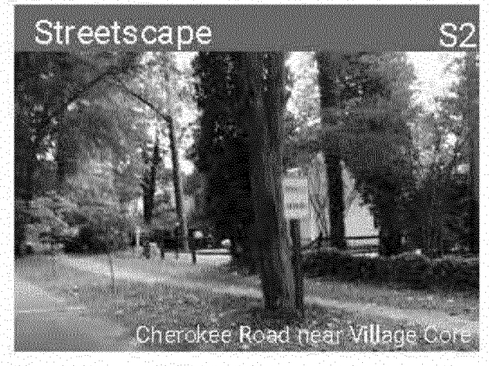


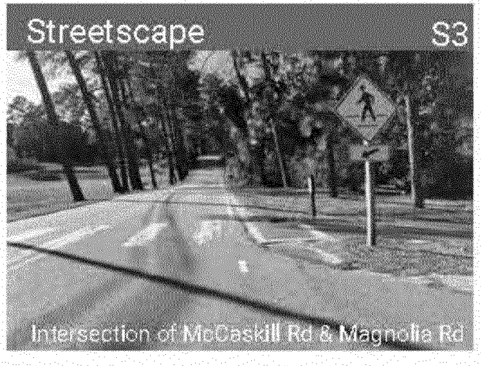




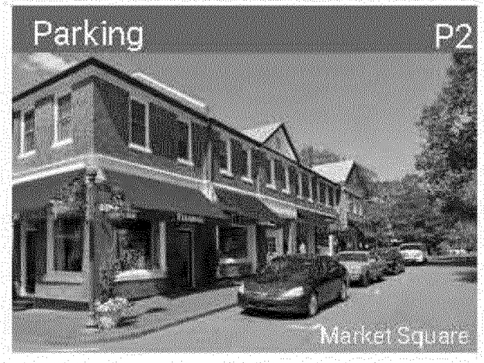
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STREETSCAPE/ PARKING











PARKS/ OPEN SPACE

PRECEDENT NOTES - BREAKOUT ROOM 3

VILLAGE PLACE

Existing Conditions

Illustrative Site Plan

The Existing Illustrative Plan depic
development and open space patter
exist in the study area. A 1/4-mile
radius (5-minute walk) is indicated
plan for reference.

1. More retail desired
2. Parking is hard to find
3. Would like to see a bikeshare program
4. Desire for more sidewalks

General Comments for VP:
- 'New England small town to the South'. Like Old Salem in Winston-Salem, arcitecture outside historic district doesn't need to match exactly/follow same rules, as long as it fits with surroundings.
- Rent is too high for most entrepreneurs
- need more retail / mixed use so you can eat/shop after work, get coffee.
- figure out how to get more people back in the area
- wayfinding signs and maps for visitors
- Currently the hotel shuttles people to Southern Pines - need to keep those people/dollars in VoP
- bringing existing vacant building up to code can be cost prohibitive for development
- highest/best use for VP is mixed-use walkability

KEY

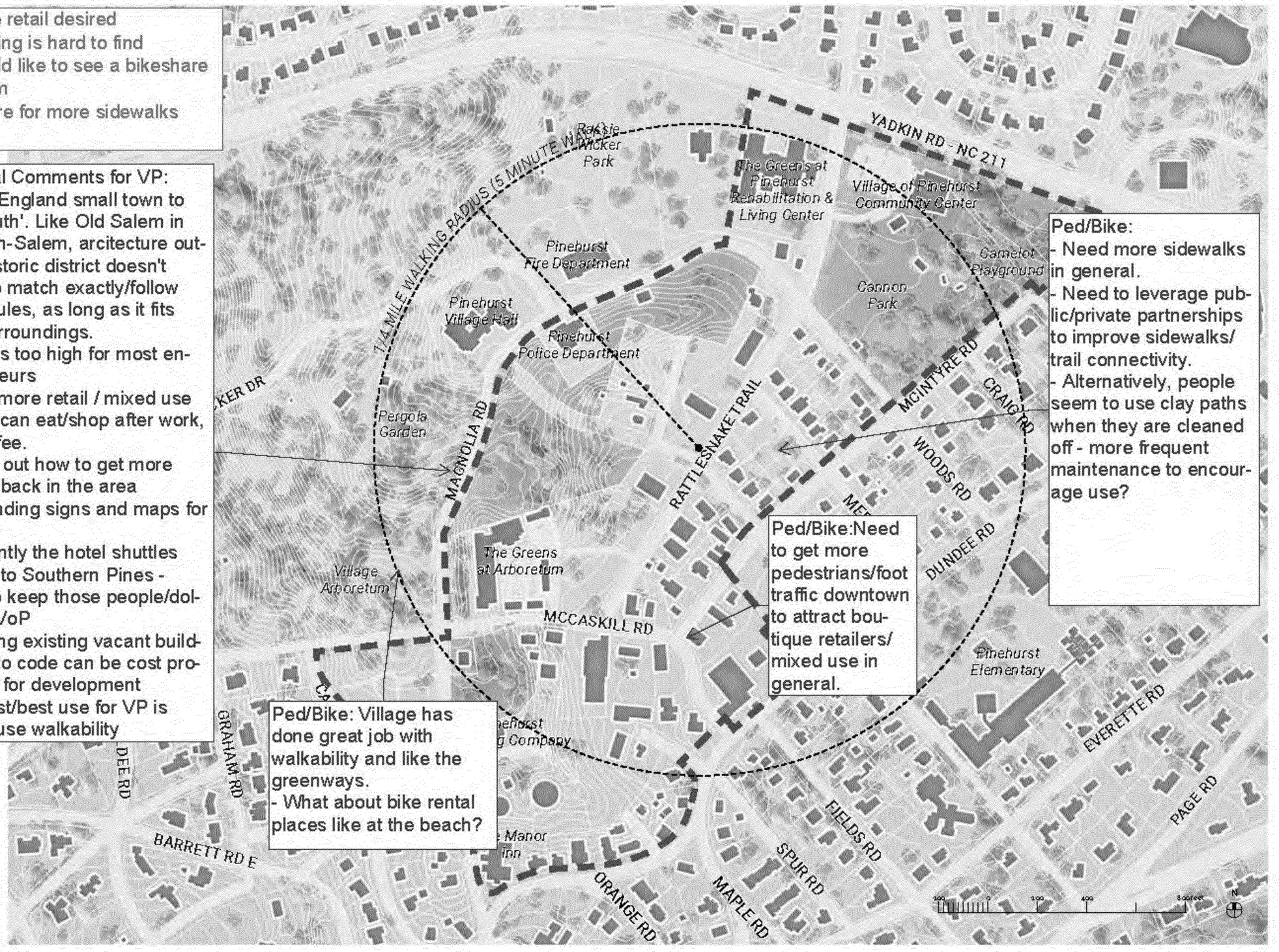
- SMALL AREA PLAN (SAP) BOUNDA
- VILLAGE OF PINEHURST
- BUILDING FOOTPRINTS
- PARKS/ OPEN SPACE

Street:

Arch Character:

Ped/Bike:

Traffic:



Ped/Bike:
- Need more sidewalks in general.
- Need to leverage public/private partnerships to improve sidewalks/ trail connectivity.
- Alternatively, people seem to use clay paths when they are cleaned off - more frequent maintenance to encourage use?

Ped/Bike:Need to get more pedestrians/foot traffic downtown to attract boutique retailers/ mixed use in general.

Ped/Bike: Village has done great job with walkability and like the greenways.
- What about bike rental places like at the beach?

VILLAGE PLACE NOTES - BREAKOUT ROOM 6

PINEHURST SOUTH

Existing Conditions

Illustrative Site Plan

The Existing Illustrative Plan depicts the development and open space patterns that exist in the study area. A 1/4-mile walking radius (5-minute walk) is indicated on the plan for reference.

KEY

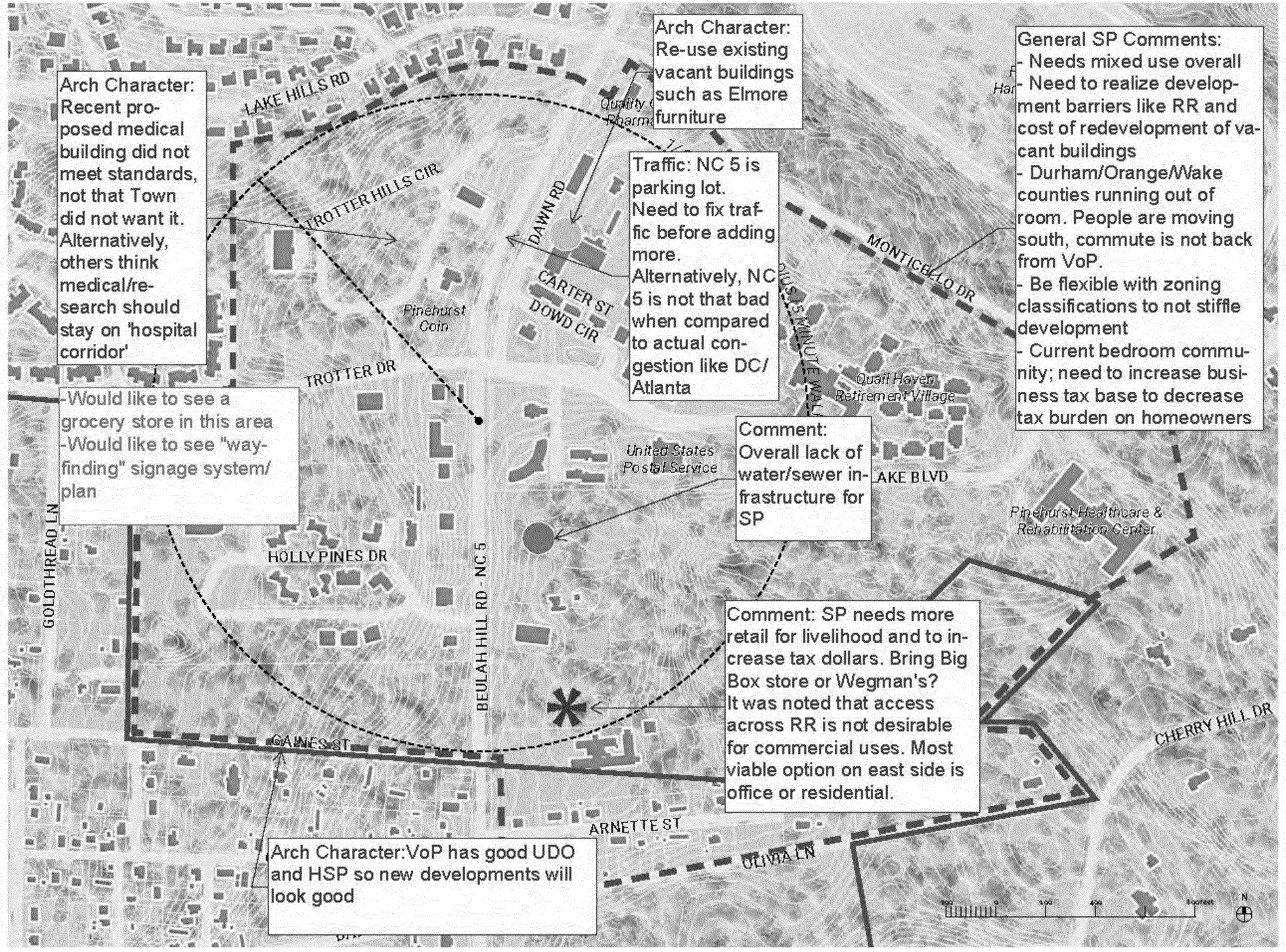
- SMALL AREA PLAN (SAP) BOUNDARY
- VILLAGE OF PINEHURST
- BUILDING FOOTPRINTS
- PARKS/ OPEN SPACE

Street:

Arch Character:

Ped/Bike:

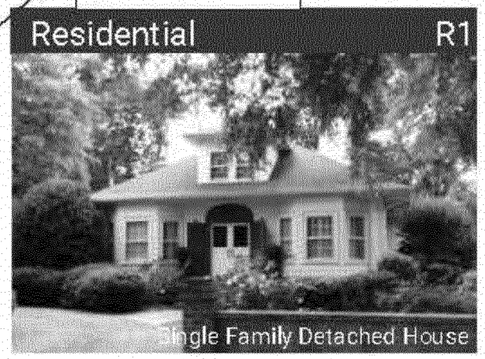
Traffic:

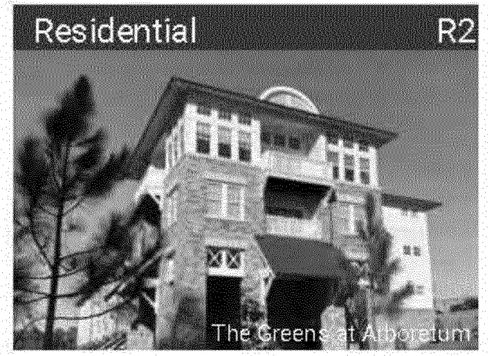


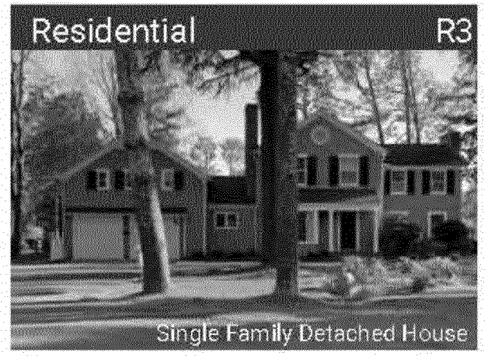
PINEHURST SOUTH NOTES - BREAKOUT ROOM 6

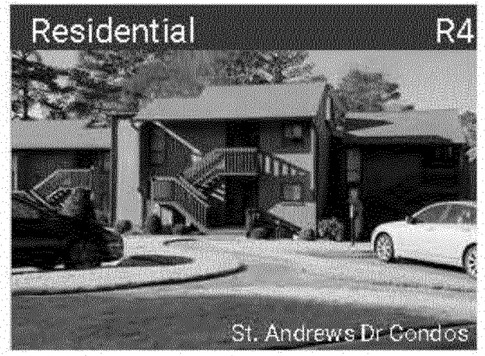
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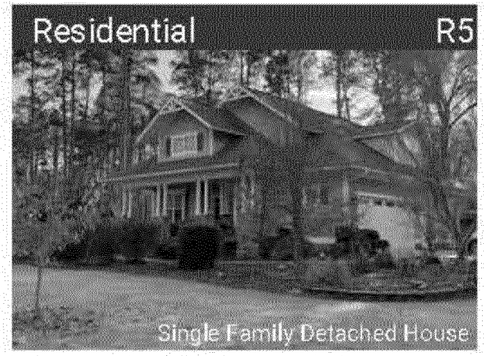
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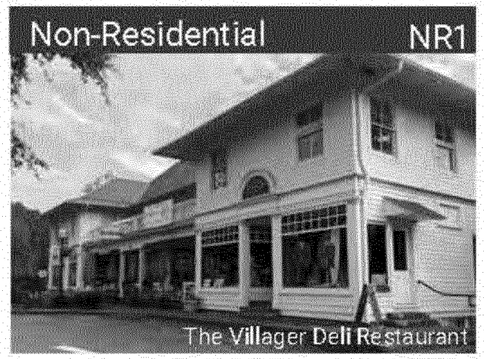


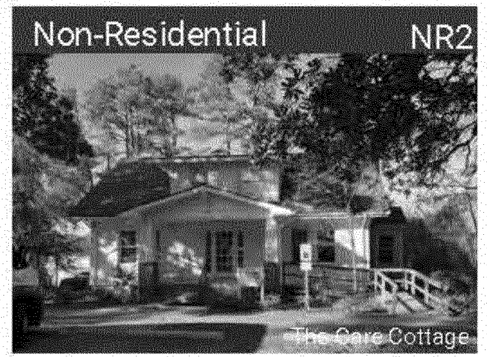


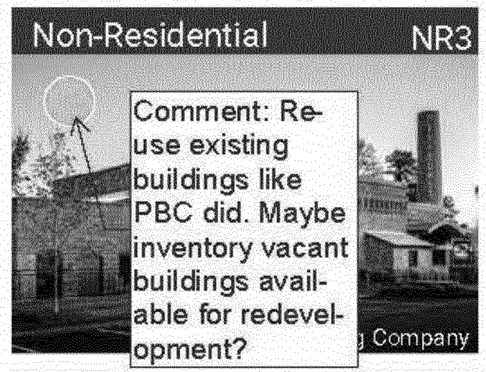




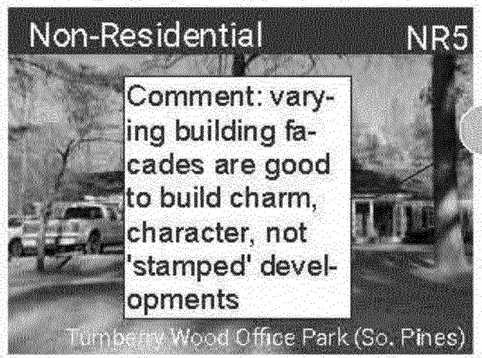






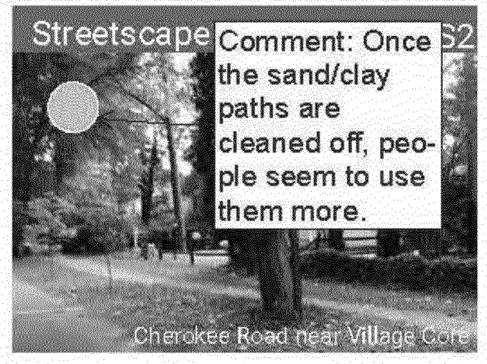


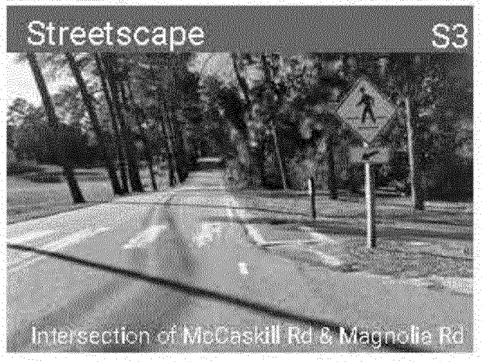


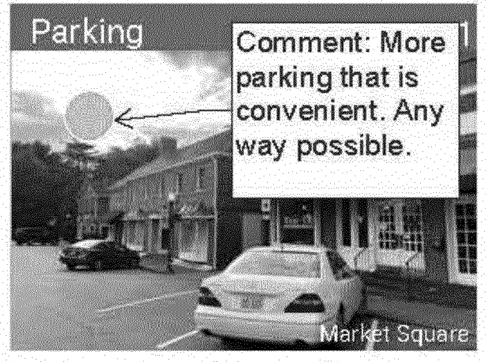


STREETSCAPE/ PARKING





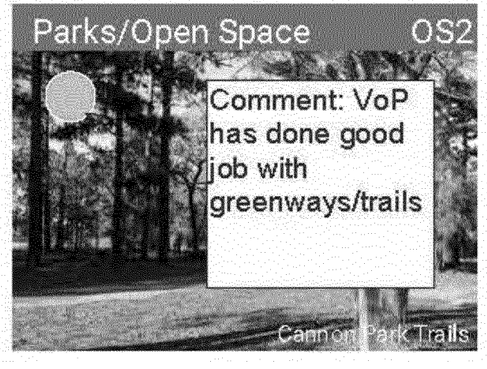






PARKS/ OPEN SPACE











PRECEDENT NOTES - BREAKOUT ROOM 6

VILLAGE PLACE

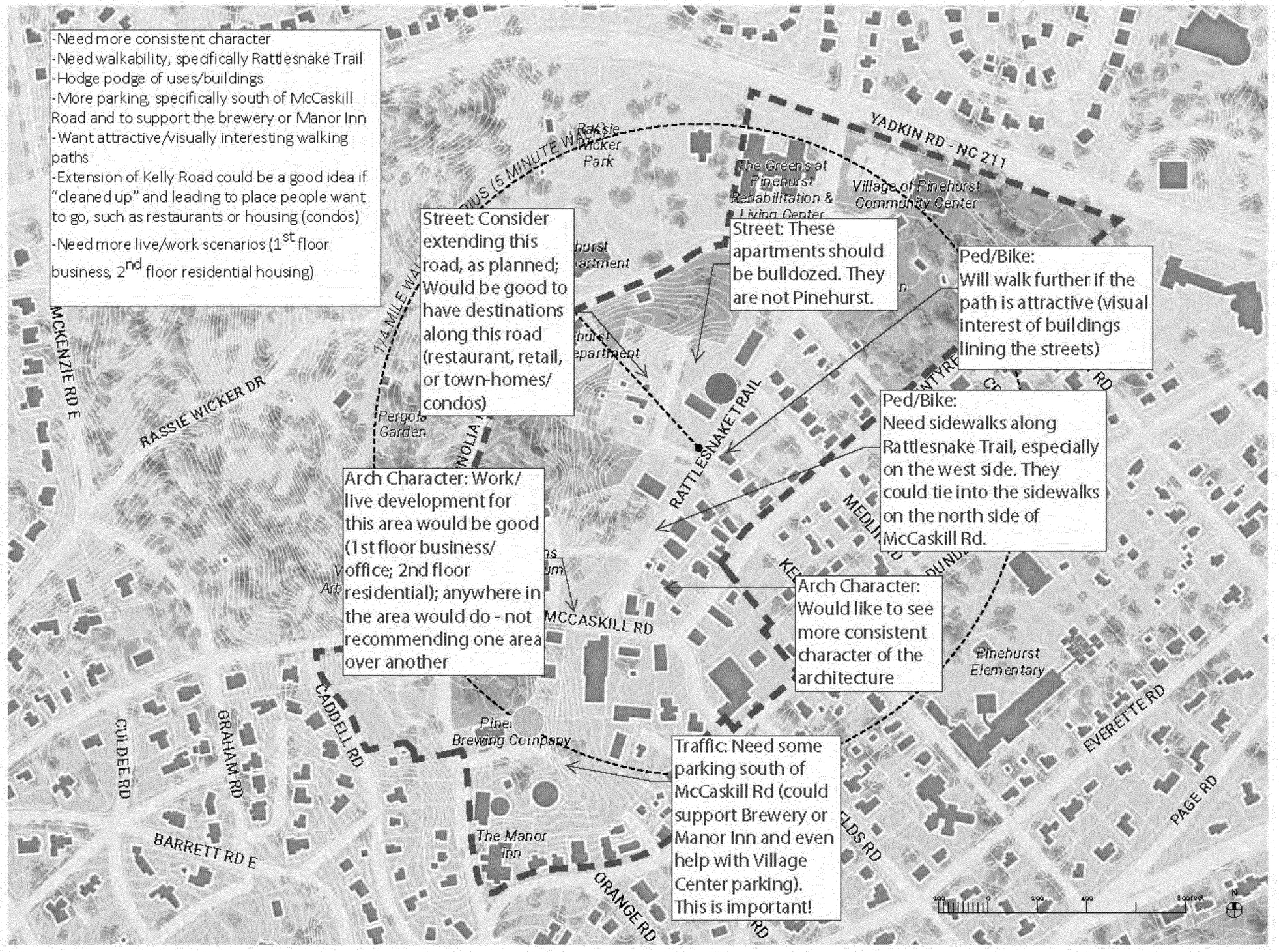
Existing Conditions

Illustrative Site Plan

The Existing Illustrative Plan depicts the development and open space patterns that exist in the study area. A 1/4-mile walking radius (5-minute walk) is indicated on the plan for reference.

KEY

- SMALL AREA PLAN (SAP) BOUNDARY
- VILLAGE OF PINEHURST
- BUILDING FOOTPRINTS
- PARKS/ OPEN SPACE



VILLAGE PLACE NOTES - BREAKOUT ROOM 7

PINEHURST SOUTH

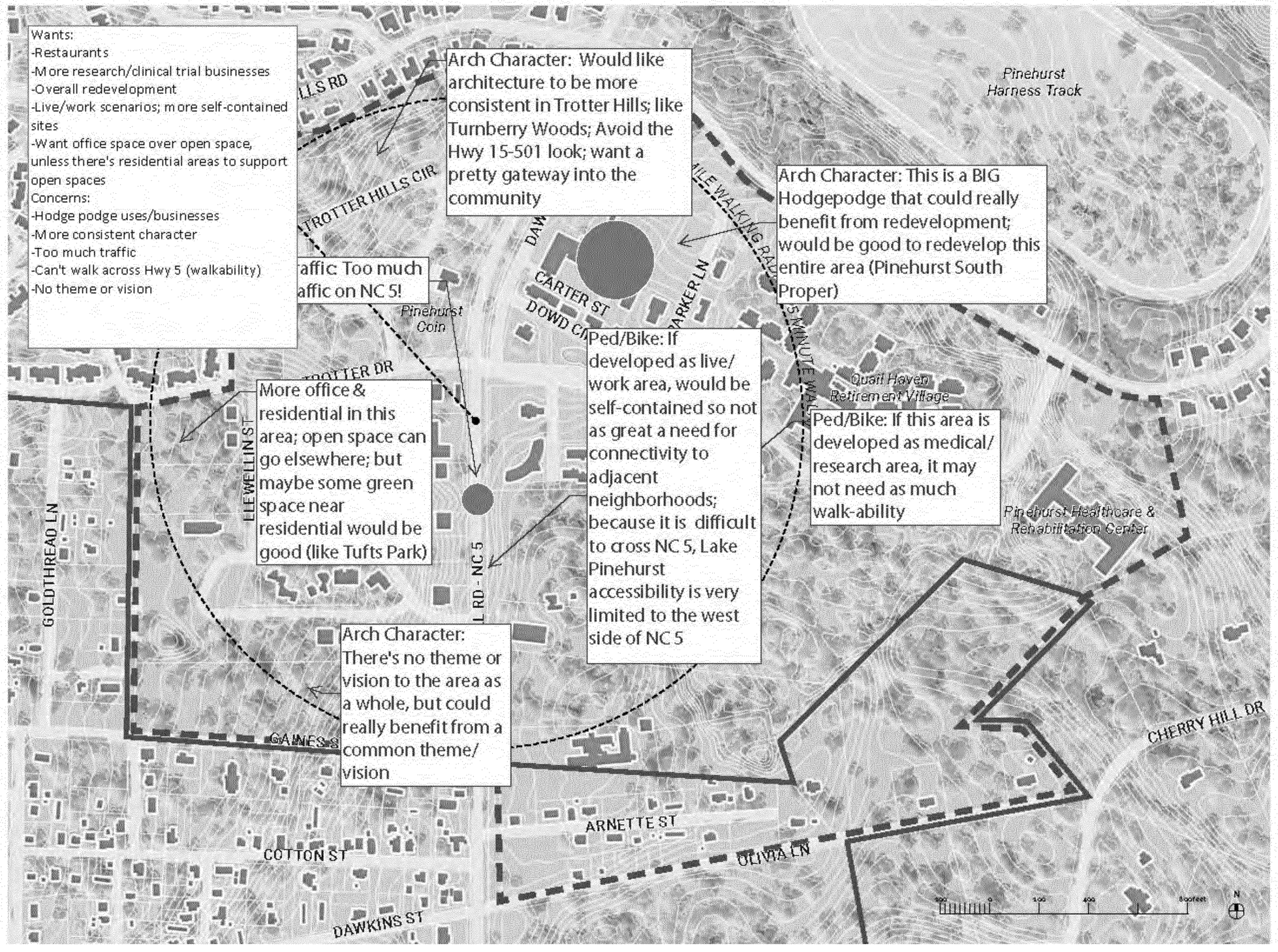
Existing Conditions

Illustrative Site Plan

The Existing Illustrative Plan depicts the development and open space patterns that exist in the study area. A 1/4-mile walking radius (5-minute walk) is indicated on the plan for reference.

KEY

- SMALL AREA PLAN (SAP) BOUNDARY
- VILLAGE OF PINEHURST
- BUILDING FOOTPRINTS
- PARKS/ OPEN SPACE

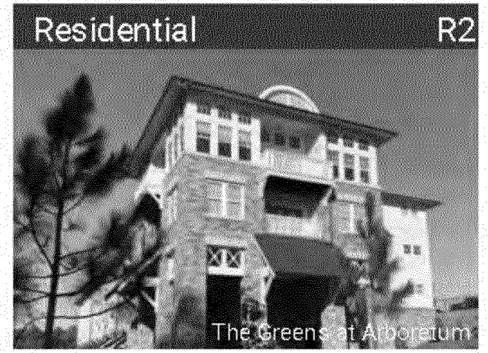


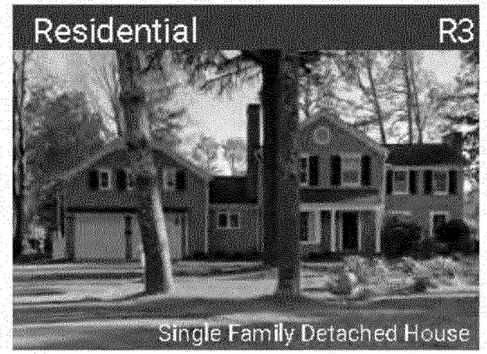
PINEHURST SOUTH NOTES - BREAKOUT ROOM 7

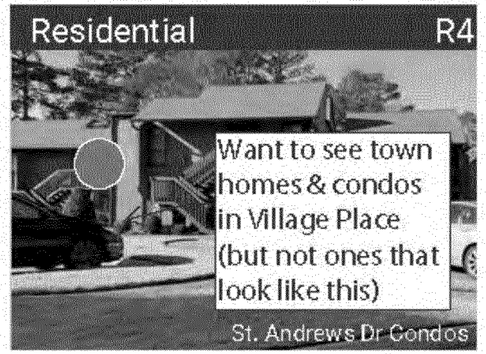
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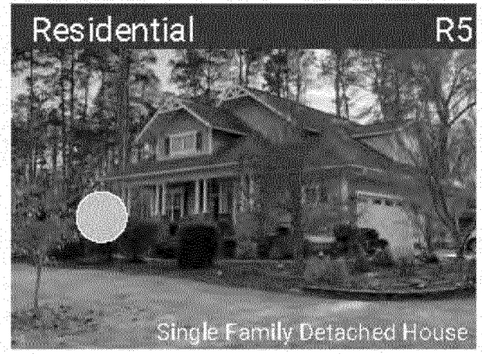
ARCHITECTURE



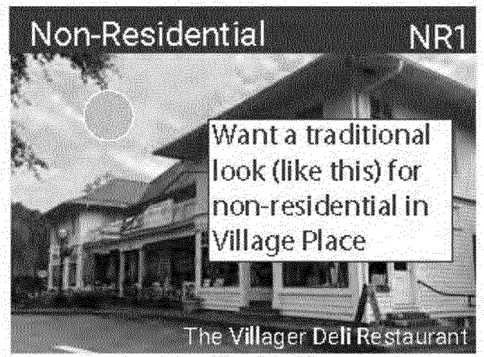


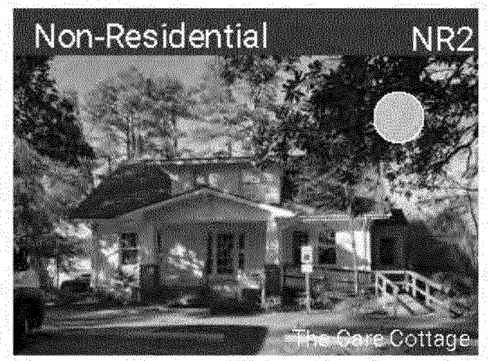


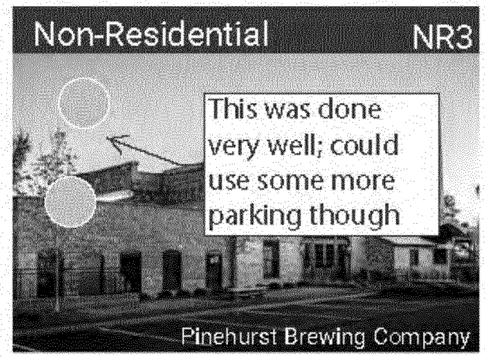


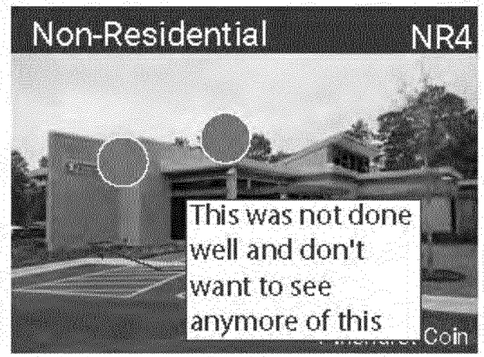


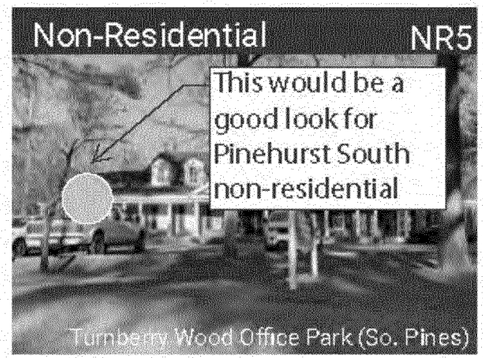
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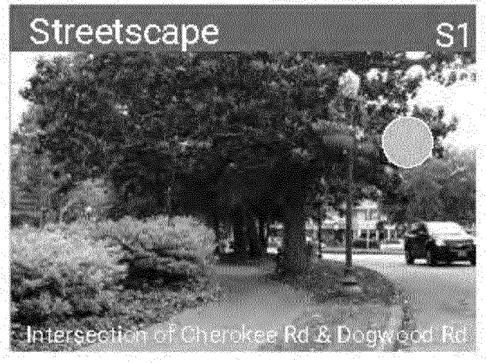


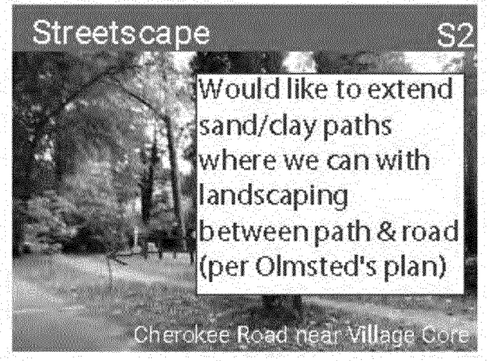


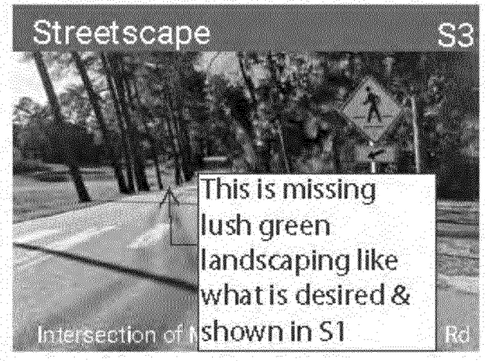


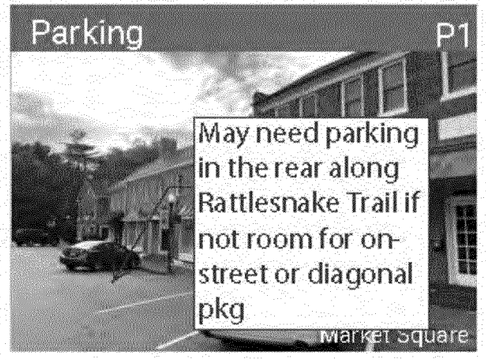


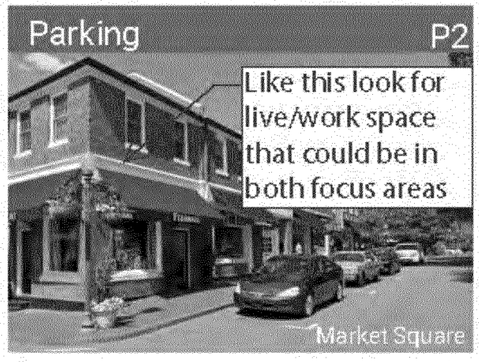
STREETSCAPE/ PARKING





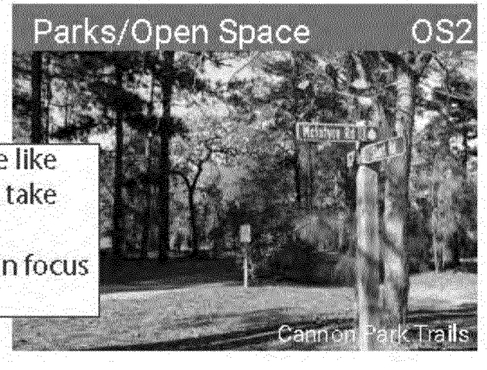






PARKS/ OPEN SPACE







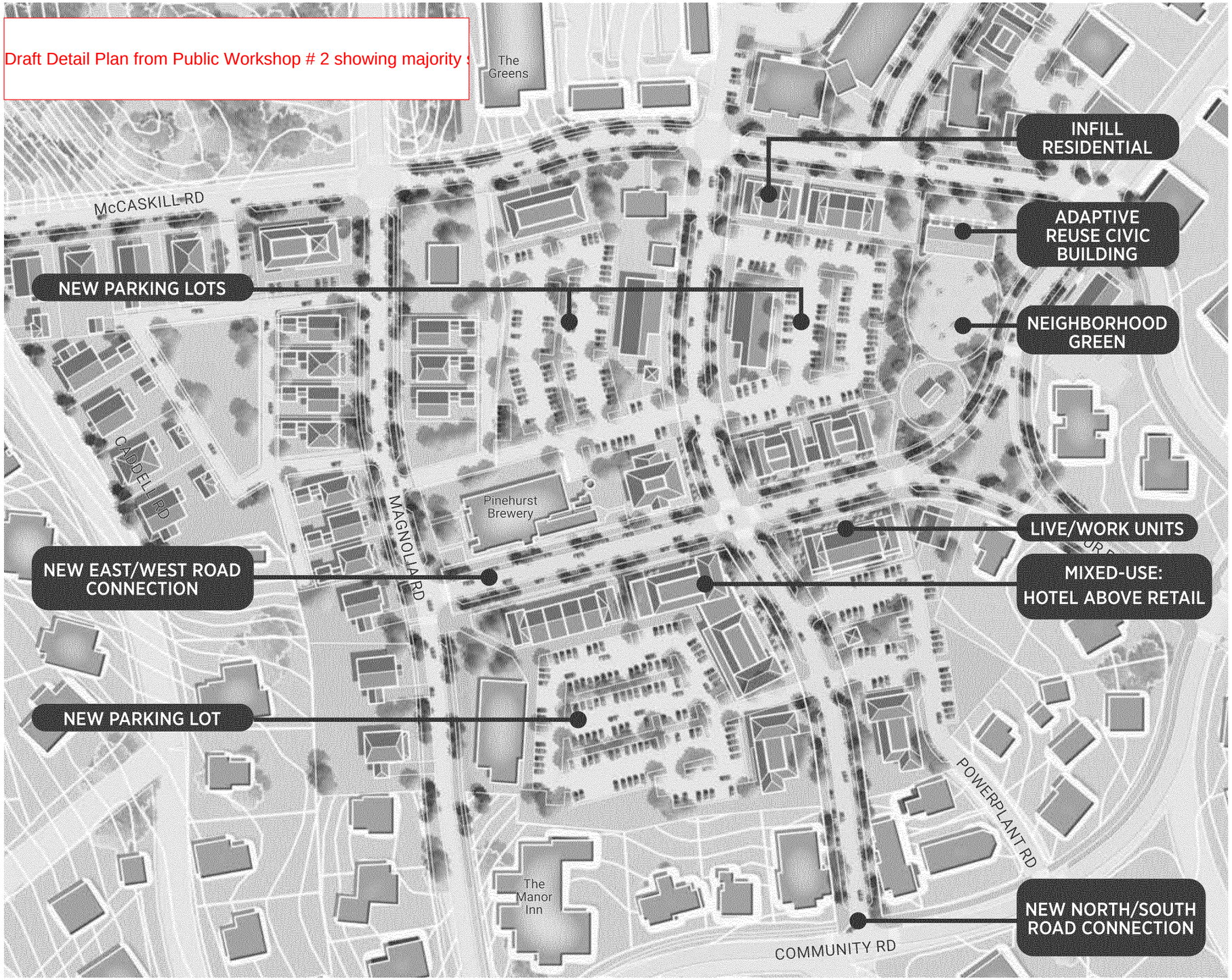




PRECEDENT NOTES - BREAKOUT ROOM 7

Detail Plan

- The Detail Plan illustrates the potential build-out on the area south of MsCaskill Road, showing new buildings, streets, parking, open and landscape
- At the core, two new streets cross the area; at their intersection, new Restaurants, a Hotel, Live/Work units , and Professional Offices congregate



This plan is illustrative only and subject to change. Source: Design Collective, Inc.

Detail Plan

The Detail Plan illustrates the potential build-out of the Village Place core area south of McCaskill Road, showing new buildings, streets, parking, and open space.

At the center, two new streets crisscross the area. Their intersection creates a hub for new restaurants, a hotel, Live/Work units, and professional offices. Parking is accommodated mid-block and as parallel on-street spaces.

Single-Family Detached (SFD) homes along McCaskill Road and Caddell Road help to transition to existing residential areas.

A new Central Green anchors the new infill area, serving as a gathering place for small community events, while a pedestrian passage links the area to Community Road, encouraging pedestrian circulation to and from the Village Core.

KEY

- EXISTING BUILDINGS
- PROPOSED BUILDINGS
- PROPOSED CIVIC BUILDINGS



This plan is illustrative only and subject to change. Source: Design Collective, Inc.



VILLAGE OF PINEHURST SMALL AREA PLAN

VILLAGE PLACE

FEBRUARY 1, 2022 | VERSION DRAFT D

Design Collective

DUGGAL REAL ESTATE ADVISORS

Moving forward. RKA RAMEY KEMP ASSOCIATES

1895 VILLAGE OF PINEHURST

ACKNOWLEDGMENTS

ELECTED & APPOINTED OFFICIALS

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Mayor

JUDY DAVIS
Mayor Pro Tem

LYDIA BOESCH
Treasurer

KEVIN DRUM
Councilmember

JANE HOGEMAN
Councilmember

VILLAGE STAFF

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Planning & Inspections Director

ALEX CAMERON
Planning Supervisor

DESIGN TEAM

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REVISION TRACKING CHART

Tracking all modifications from Version 1.0, dated January 2022.

VERSION	PAGE	CONTENT	REVISION DATE	PLANNING APPROVAL

EXECUTIVE SUMMARY

Executive Summary text will be added to the final report version.

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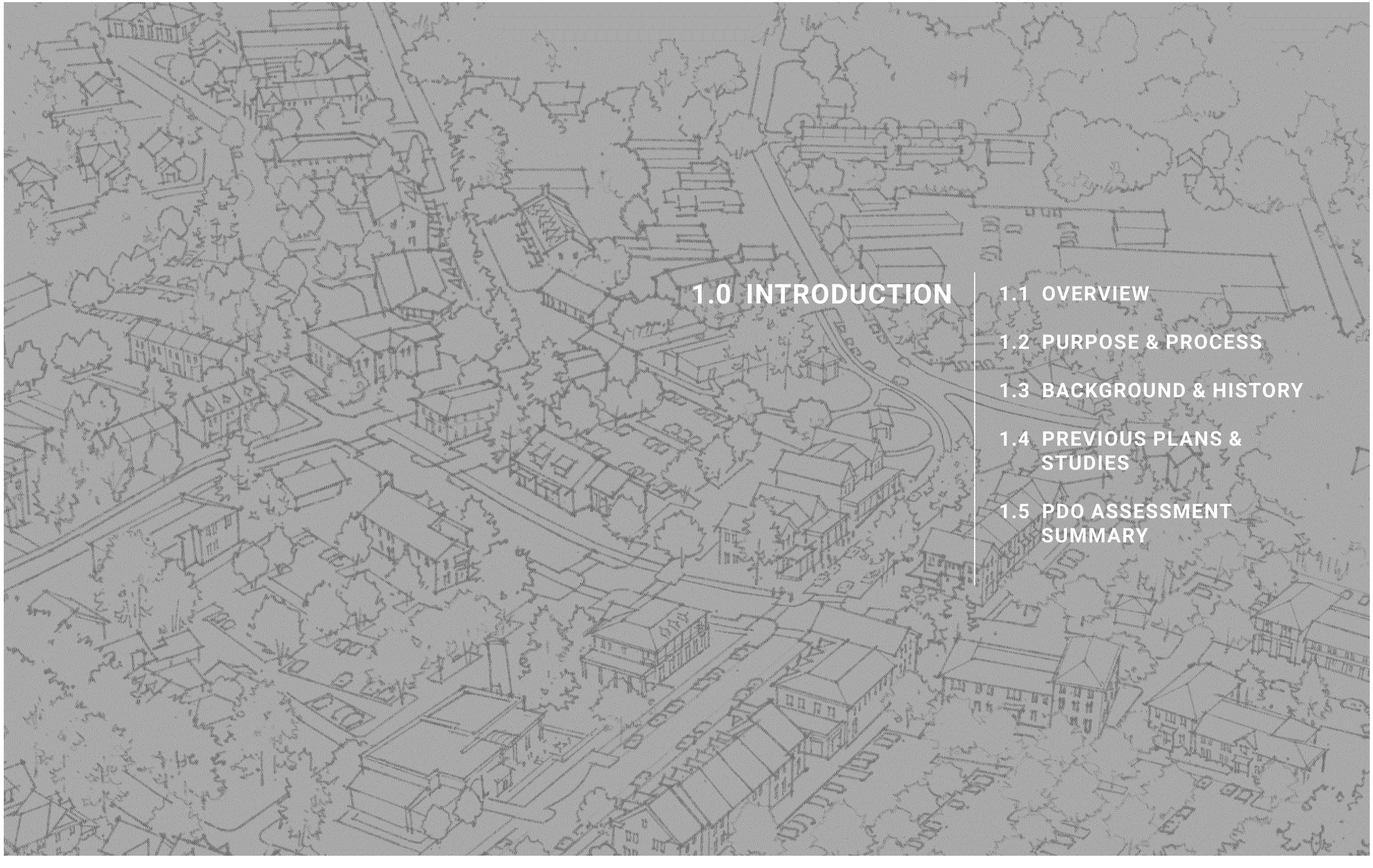
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1.0 INTRODUCTION

1.1 OVERVIEW

1.2 PURPOSE & PROCESS

1.3 BACKGROUND & HISTORY

1.4 PREVIOUS PLANS & STUDIES

1.5 PDO ASSESSMENT SUMMARY

1.1 OVERVIEW & PROCESS

Overview

The Village of Pinehurst identified two locations within the Village boundary, Village Place and Pinehurst South, as areas well-suited to accommodate growth, advance economic development goals, increase revenues and the tax base, and to support the many quality-of-life needs of existing residents, businesses, and visitors.

In an effort to advance these opportunities and create a set of Small Area Plans that respond to the Village's 2019 Comprehensive Plan and guide future development initiatives, the Village of Pinehurst hired Design Collective, Duggal Real Estate Advisors, and Ramey Kemp & Associates. These plans will guide decision making on new development and redevelopment, public and private investments, policy and zoning, and many other important topics that will have a long-term impact on the Village.

The focus of this document is on the Village Place Small Area Plan. For recommendations pertaining to Pinehurst South, please see the *Pinehurst South Small Area Plan*.

The scope for the Village Place Small Area Plan project included planning, streetscape, and landscape design; market/economic analysis; and transportation planning. The consultant team, led by Design Collective, worked on behalf of the Village and prepared plan recommendations, zoning regulations, and development standards specific to Village Place that, once adopted by the Village, will guide future private development as well as public capital improvement projects.

Process

The Small Area Plans effort occurred in the three following phases, with stakeholder involvement in all phases. Work began in November 2020 with adoption projected in late 2021. For additional information on stakeholder input and public feedback, refer to Section 3.0 of this document.

PHASE 1: DATA COLLECTION; EXISTING CONDITIONS INVENTORY AND ANALYSIS

The first step in the process was to fully assess and understand existing conditions; historic, cultural, and environmental assets; neighborhood goals and objectives; realistic market-driven development opportunities; resident and stakeholder concerns and input; constraints and opportunities; and other factors that would inform the Small Area Plan.

Throughout December 2020 and January 2021, the consultant team conducted over 20 key stakeholder interviews, discussing the two plan areas with Village staff, appointed and/or elected officials, agency representatives, committee chairs, residents, local businesses and merchants, golf and tourist industry representatives, major employers, property owners, developers, brokers, and others to further understand their viewpoints. Phase 1 concluded with Public Workshop 1 in February 2021 with approximately 100 attendees.

PHASE 2: PLANNING AND DESIGN

In Phase 2, from March to June 2021, based on the analysis conducted and feedback received during Phase 1, the consultant team designed and compiled Concept Plan Options, Street Sections, Open Space and Street Network Plan Diagrams, Renderings, Precedent Images, and similar for Village Place and Pinehurst South. During this timeframe, the consultant team discussed the two plan areas and concepts with Village staff, appointed and/or elected officials, and key stakeholders and, based on input received, refined the concepts. These concepts were shared in early June 2021 in Public Workshop 2 to solicit further feedback; approximately 59 attendees participated.

PHASE 3: MASTER PLAN REPORT

During Phase Three, the design team presented the final draft plan to the community at a public input event in February 2022. This event provided an opportunity for the public to review and comment on the final draft prior to adoption. The design team then prepared this final master plan report, an illustrated, guiding document that outlines the preferred plan options and supported recommendations for the Village Place Small Area Plan.

The Plan was approved by the Village of Pinehurst Council and recommended for adoption as an element of the _____ through General Resolution #-_____ on _____, 2022.

The Plan was adopted as an amendment to the Village of Pinehurst Development Ordinance by the Village Place Council through Amendment #-_____ on _____, 2022.

Project Goals

The following project goals were identified in the project RFP, issued by the Village:

- Create a mixed-use walkable destination area that is connected to the Village Center;
- Create an implementable plan to make the community's vision for the area a reality in keeping with previous planning efforts and the newly adopted Comprehensive Plan;
- Economic feasibility, urban design, and improving the public realm (e.g. roadways, sidewalks, parks, plazas, open spaces) are key aspects of this plan that must include specific and achievable actions;
- Expand the footprint of authentic Pinehurst - immediately north of the historic center of the community - and add a new front door to the historic center from NC Highway 211;
- Connect the historic Village Center area with Village Place via a "connecting spine(s)" which should include new or extended streets, sidewalks, and paths;
- Extend the vision of Tufts, Olmsted, and Manning from the Village Center to Highway 211 throughout Village Place and along Rattlesnake Trail;
- The Plan must be consistent with the foundational principles set forth in the National Historic District Nomination (Nomination) submitted to the National Park Service in 1994. The area should feature:
  - Abundant landscaping, walking paths and open spaces while
  - Minimizing traffic and maintaining the human scale of buildings.
- Guiding Principles 1, 2, 3 and 7 of the 2019 Comprehensive Plan are especially important to the development of the Small Area Plans;
- Parking for existing uses in the Village Center and surrounding areas will also need to be accommodated here;
- Care must be taken to consider the interaction of any proposed new use with existing uses in the area, and to consider the impact of any proposed new use on the Village Center and its surrounding neighborhoods; and
- Provide sufficient and discrete parking for any proposed use will be an important consideration.

Planning Goals

The following planning goals were identified through the development of the *Village Place Small Area Plan*, based on analysis and stakeholder feedback:

- Promote a mixed-use walkable neighborhood that is reflective of the Village Core, but does not compete with or drain the economic success of it;
- Recommend mixed-use south of McCaskill that is of a similar scale to the Village Center, while exploring additional mixed-use and infill commercial along Rattlesnake Trail;
- Incorporate new small Open Spaces, to supplement and connect to the existing larger Open Spaces in and adjacent to Village Place;
- Explore new infill development with the relocation of the VOP Services Complex; and
- Provide a connected street network that will help to alleviate traffic congestion on Rattlesnake Trail and cut-through traffic in adjacent residential streets.

Locator Map

The Village of Pinehurst boundary encompasses approximately 17.3 square miles of land area. The two focus areas, Village Place and Pinehurst South, are located to the north and south of the Village Center, the historic hub of the community. Connecting these two focus areas is a range of housing, lodging accommodations, retail, and recreational amenities, including golf courses, lakes, and walking and bike trails.

KEY

- VILLAGE OF PINEHURST
- SMALL AREA PLAN BOUNDARIES



1.2 PURPOSE

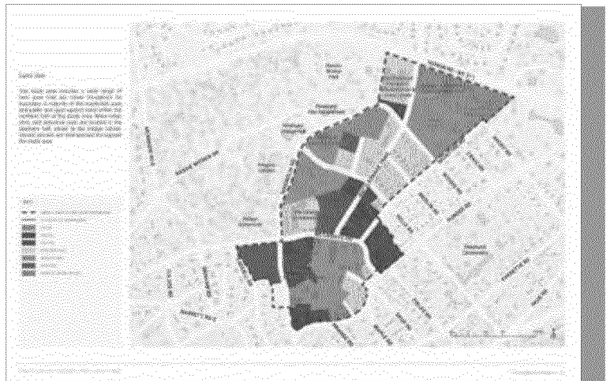
The purpose of this plan is to define the characteristics of future development that are supportable and appropriate for Pinehurst, to guide change towards a predictable and agreed upon outcome. This plan addresses land use; street types; open space; pedestrian and bicycle facilities and connectivity; and numerous other considerations and, in concert with the *Village Place Form-Based Code,* creates a framework for the future built environment.

The document includes the following components:



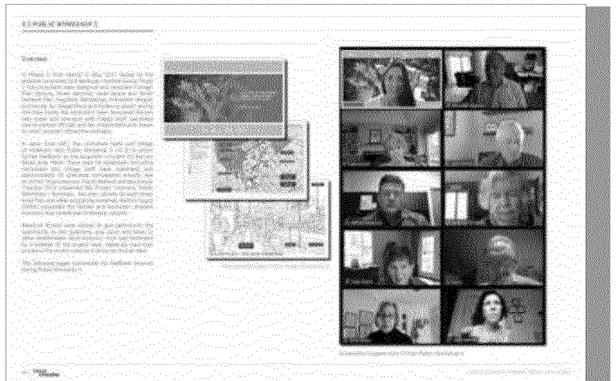
SECTION 1.0: INTRODUCTION

Provides a brief overview of the project location, the objectives and process, and a general description of the document's content.



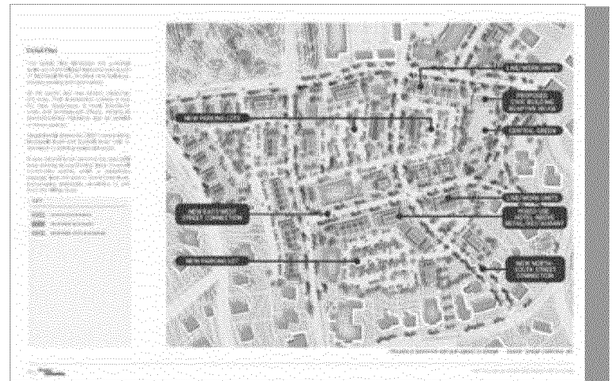
SECTION 2.0: EXISTING CONDITIONS

Examines the physical and market conditions of Village Place through photo documentation, analysis of data, stakeholder interviews, and community feedback.



SECTION 3.0: PUBLIC OUTREACH

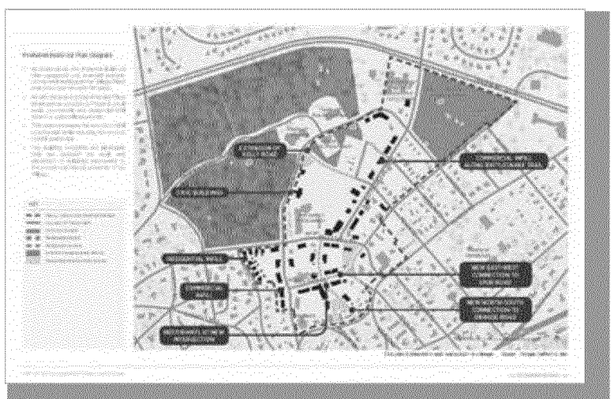
Provides a brief overview of the stakeholder interviews and public workshops that were implemented as part of the public outreach process.



SECTION 4.0: RECOMMENDATIONS

Provides a brief overview of the approach, concept planning, and feedback that the consultant team used as guidance towards the final recommendations.

Highlights development opportunities; describes street systems; and provides illustrative and photographic examples of open spaces and streetscape design elements.



SECTION 5.0: IMPLEMENTATION

Summarizes fiscal analysis data as it relates to the implementation of the proposed concept design and approach for Village Place.

This document does not cover development standards required for construction review within the Village Place Small Area Plan, including Site Design, Street Design, Landscape Design, Architectural Design, and Sign Design criteria. For more information on the on the criteria and the submission and review process, please refer to the Village Place Form-Based Code and the Pinehurst Development Ordinance.

Site Aerial

The aerial image shows the Village Place Small Area Plan (SAP) boundary as a brown dashed line.

KEY

SMALL AREA PLAN (SAP) BOUNDARY

VILLAGE OF PINEHURST



Background and History

The Village of Pinehurst is a small, traditional village located in North Carolina, approximately 70 miles from Raleigh and 100 miles from Charlotte. Located equidistant to these two major cities, the Village is accessed by Yadkin Road - NC 211 and US 15/501 as the two major thoroughfares that bisect its boundary.

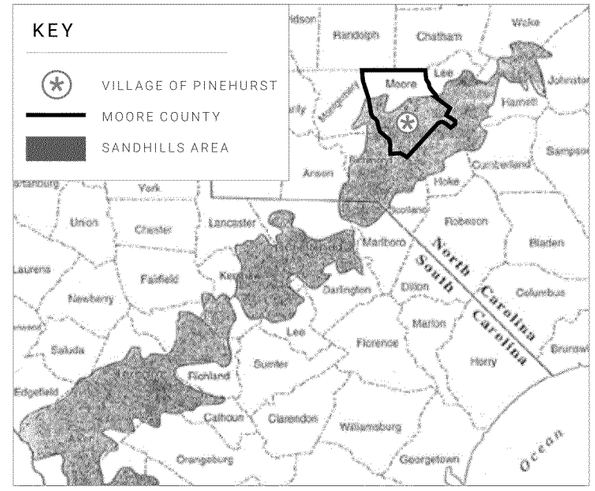
One of two National Historic Landmark Districts in North Carolina, the Village is deeply rooted in its setting and history. The area is nestled in “the Sandhills” of Moore County, characterized by rolling hills, covered by deep coarse sands and forested areas. Longleaf pines, in particular, were a major resource for the region and harvested to produce turpentine for the naval industry and lumber. By the late 1800s, the growth of the Raleigh and Augusta Railroad became a catalyst for industry and development.

By 1895, James Walter Tufts purchased the original lands of the Village, approximately 5,980 acres, to create a health resort and wellness community centered around pulmonary issues. He hired one of the country’s most prestigious landscape architecture firm at the time, Olmsted, Olmsted, and Eliot to plan and design the Village.

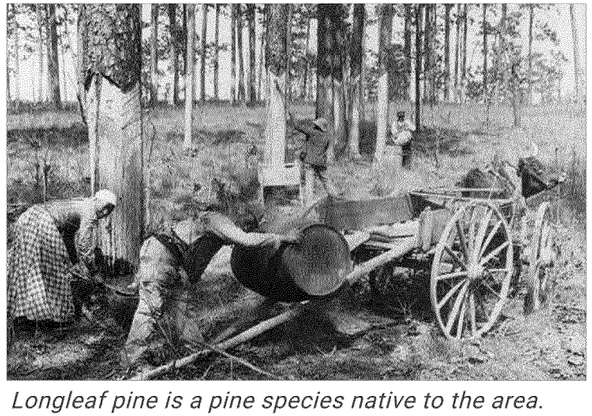
The Village of Pinehurst was first opened in January 1896 with the Holly Inn and several guest cottages as the initial phases of development. Since then, the Village has grown to become an iconic golf destination and anchor site of the U.S. Open, supported by the Pinehurst Resort, a variety of hotels, boutique shops and restaurants, and a wide range of trails, natural amenities, and historic sites for visitors to enjoy.



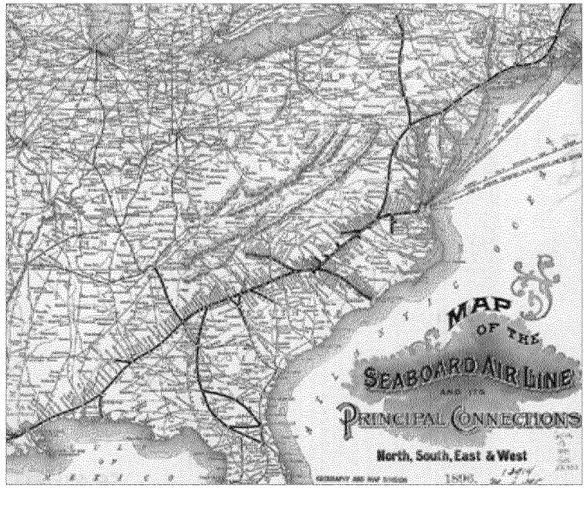
Regional map



Map of the Sandhills Area



Longleaf pine is a pine species native to the area. Pine resin was extracted and collected into barrels for distilling into turpentine used to make oil paint for ships and buildings.

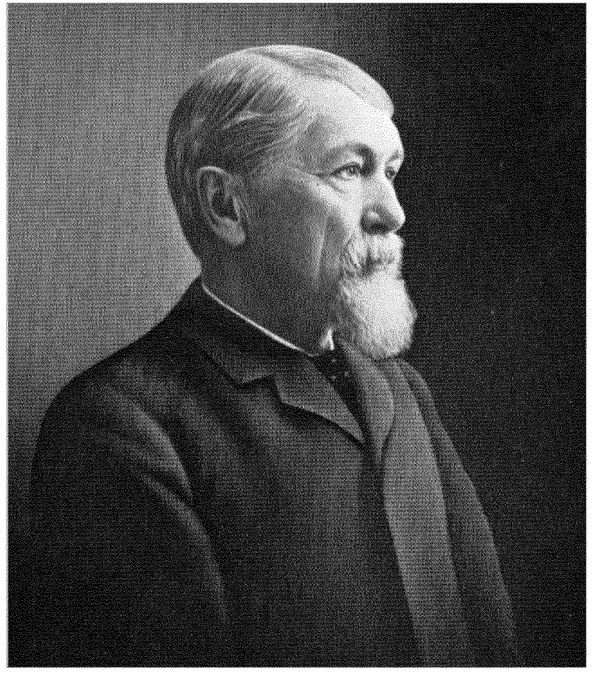




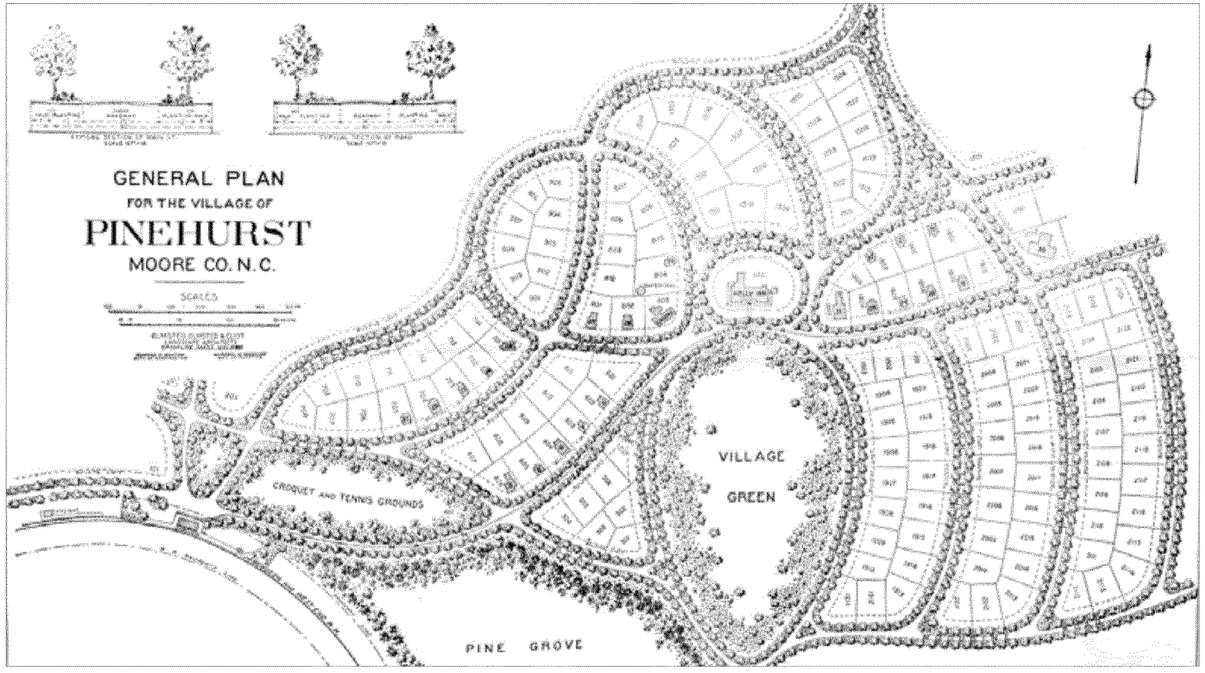




In the 1800s, pollution in cities and the expansion of rail lines to the south provided the catalyst for people to retreat to warmer and healthier environments, contributing to the growth and development of parts of North Carolina.



James Walter Tufts



General Plan for the Village of Pinehurst - 1895

1.4 PREVIOUS PLANS & STUDIES

Since becoming a municipality in the 1980s, at least eight plans have been completed, either encompassing the full area of the Village, or focusing on a particular neighborhood. A summary of each relevant study can be found below.

2020 STRATEGIC OPERATING PLAN

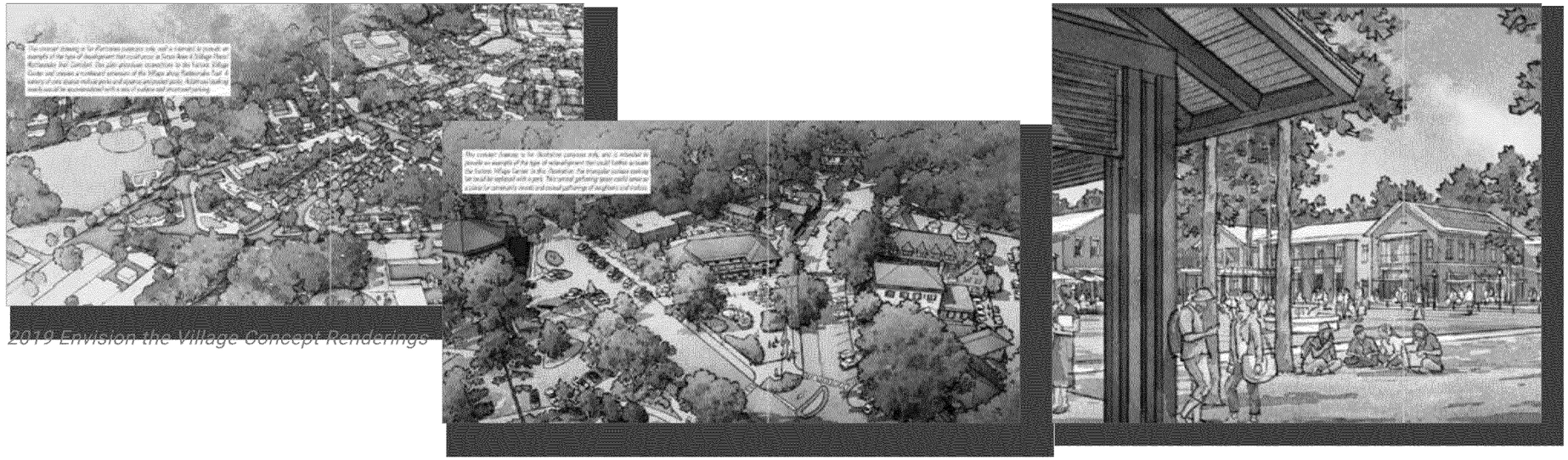
As the most recent previous planning effort untaken by the Village, this plan identified growth in population and increased development as the primary issues facing the Village. The plan established the following priorities and areas of focus:

1. Safeguard the community;
2. Promote high quality development and appearance;
3. Promote a thriving business community;
4. Promote transportation mobility and connectivity;
5. Protect the environment;
6. Promote active living and cultural opportunities;
7. Professionally manage a high performing organization;
8. Attract and retain an engaged workforce; and
9. Maintain a healthy financial condition.

2019 COMPREHENSIVE PLAN

The Village completed the *2019 Comprehensive Plan* as a guide to manage growth for the next 15-20 years. The planning effort included a significant level of public participation including numerous public forums and online engagement. The Plan outlined the following seven guiding principles:

1. Retain the small-town charm, scale, and character of the community to ensure a high quality of life. Celebrate and preserve the historic Village and traditions that make Pinehurst desirable and unique.
2. Balance the need to conserve land while allowing purposeful, quality development in strategic locations to meet the needs of residents, businesses, and visitors. Ensure high quality development that reflects the character of the community and maintain high quality gateways and corridors to ensure the built environment is in keeping with the character of Pinehurst.
3. Protect and enhance the quality and character of existing residential neighborhoods. Seek opportunities to offer a variety of housing types that appeal to a wide range of households and enable residents to live in Pinehurst throughout all stages of life. Ensure neighborhoods are connected to walkable destinations such as parks, open spaces, recreational facilities, and other activity centers.
4. Provide a safe, reliable and efficient transportation system that promotes and enhances mobility and connectivity between neighborhoods and destinations through a multi-modal network of complete and walkable streets, sidewalks and paths for vehicles, golf carts, pedestrians, and cyclists.
5. Support the golf, tourism and healthcare industries that make up the economic backbone of the community by encouraging entrepreneurship, supporting diverse and innovative businesses, and developing a thriving arts, culture, and entertainment market. Encourage a variety of shopping, dining, and cultural opportunities for residents and visitors alike.
6. Ensure supporting infrastructure and community facilities exist to meet the needs of existing and future Pinehurst residents, businesses, and visitors. Partner with other providers to plan for and expand infrastructure as necessary to ensure a high quality of life.
7. Preserve, conserve, and feature Pinehurst's natural resources with expanded parks, open spaces, and events that enhance the health and well-being of the community and the environment.



2019 Envision the Village Concept Renderings

2015 COMPREHENSIVE BIKE PLAN

The *2015 Comprehensive Pedestrian Plan* was completed to evaluate the needs of current and future residents and visitors in the Village. The efforts included input from a Steering Committee, several Community Workshops/ Events and a Pedestrian/Bicycle Survey. The following Goals and Objectives were established:

- Increase the options for bicycling as an alternate form of transportation within the Village
- Provide attractive, yet safe, bicycling connections from Village residential areas to nearby destinations
- Promote bicycling as a healthy exercise
- Create a bicycle environment that is friendly to all users - including seniors, disabled persons and children
- Improve connections between disparate parts of the Village
- Promote bicycle safety

2015 COMPREHENSIVE PEDESTRIAN PLAN

The *2015 Comprehensive Pedestrian Plan* was completed at the same time as the *2015 Comprehensive Bike Plan* to evaluate the needs of current and future residents and visitors in the Village. The efforts included input from a Steering Committee, several Community Workshops/ Events and a Pedestrian/Bicycle Survey. The following Goals and Objectives were established:

- Increase "walkability" in the Village of Pinehurst
- Create a pedestrian network that is an important part

of the urban structure

» Promote walking as healthy exercise

» Create a pedestrian environment that is friendly to all users – including seniors, disabled persons and children.

» Improve connections between disparate parts of the Village.

2011 VILLAGE OF PINEHURST THOROUGHFARE PLAN

The *2011 Village of Pinehurst Thoroughfare Plan* was completed as an update to the original Thoroughfare Plan completed 20 years prior by the North Carolina Department of Transportation. The intent was to ensure a dynamic and strategic road network for the Village of Pinehurst for future travel and development needs. As stated in the report, the intent was to create a local consensus of the vision for Pinehurst's future transportation system. The plan included a designation of roadways as Major Thoroughfares, Minor Thoroughfares, and Collector Streets, as well as a Thoroughfare Map identifying each road classification. The plan recommended the following principles for the Village's local road improvements:

» Advocate for context sensitive design in all transportation planning and design efforts

» Continue to prefer roundabouts over signalized intersection and other traffic control devices when considering intersection improvements.

» Assure appropriate landscaping as a high priority on road projects in the jurisdiction

» Preserve the tree canopy on local and regional projects to maintain our community character

» Preserve and enhance landscaping at gateway intersections

» Maintain and enhance landscape along road corridors

» Maintain strong design controls in the transportation planning review process

» Continue to investigate methods to minimize the overall costs of future pavement maintenance

» Continue to monitor traffic speeds

» Continue efforts to minimize the number of curb cuts and other possible disruptions to traffic flow, capacity, and safety on major roads.

» Continue to plan for additional sidewalks and trails to be integrated with local streets and NCDOT projects

2010 COMPREHENSIVE LONG RANGE PLAN

The *2010 Comprehensive Long Range Plan* was a two part document including a Strategic Element and an Implementation Element. The Strategic Element guided the overall strategic direction of the Village to preserve and enhance the overall sense of place. The Implementation Element included a detailed compilation of tasks and programs to be completed. The plan outlined four thematic elements: Enhance, Preserve, Guide and Support. With the plan, the Village intended to:

» Preserve and enhance the unique character and ambience of the entire community, especially the historic Village Center

» Enhance the quality of life for present and future residents

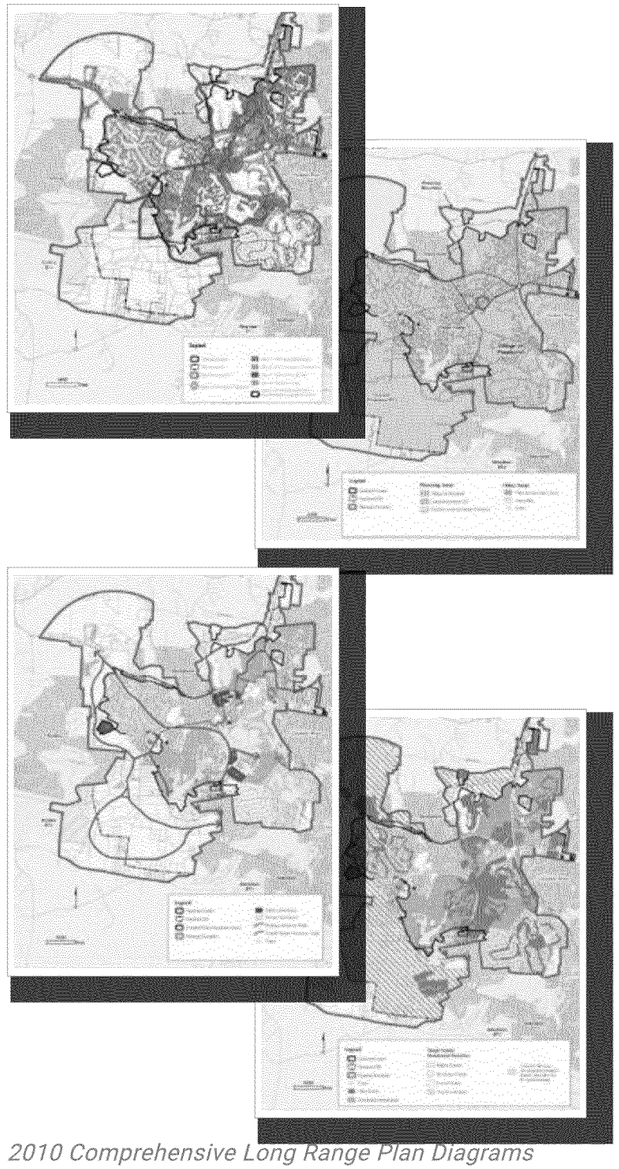
» Guide growth or change in ways that complement the unique character and ambience of the community

» Address community needs in the most efficient and cost-effective manner

» Maintain the legacy of Pinehurst for future residents and visitors to enjoy.

2008 NEW CORE MASTER PLAN

The *2008 New Core Master Plan* focused on an area of approximately 19 acres in the Village Center as an opportunity for redevelopment. The study included participation of a Steering Committee as well as extensive public participation, including a three-day charrette. The



2010 Comprehensive Long Range Plan Diagrams

Key Concepts and Principles for the Plan included:

» Continuation of the scale, design, architectural character and "walkability" of the Village Center

» A mix of uses – retail, office, residential and open spaces

» Addition of roads and sidewalks to provide access to the interior of the plan area and to continue the Village's interconnecting street pattern

» Clustering retail uses on the southern portion of the plan area, where they would be in close proximity to the Village Center and enhance its strength as a specialty retail location

» Adding a variety of residential uses – cluster homes including single-family residential, townhouses, live-work units, and other market-supported residential forms

» Adaptive reuse and/or relocation of historic structures

» Pedestrian emphasis

» Providing at least as much parking as needed for development in the New Core

1994 NATIONAL HISTORIC LANDMARK NOMINATION

The *1994 National Historic Landmark Nomination* highlights the history and making of Pinehurst by Frederick Law Olmsted, Warren H. Manning, and James Tufts. The document highlights the intentions of the Olmsted plan to ensure the "overlay of an evergreen landscape on a curvilinear pattern of Village streets" as the heart of the design for the recreational resort and details many aspects of the original plan and development.

A companion to the 1994 National Historic Landmark Nomination was the creation of the Village of Pinehurst Historic District Standards, which were first created in 2006, with a major update in 2019.

1.5 PDO ASSESSMENT SUMMARY

The development ordinance for the Village, known as the *Pinehurst Development Ordinance (PDO),* includes regulations for all development (whether new, or modifications to existing, development) and was first adopted in 1981, with a recent comprehensive update in 2014.

As part of the analysis of the Small Area Plan (SAP) Existing Conditions, the consultant team completed a comprehensive review of the PDO, looking for items of concern, compiled in this summary, that may inhibit achieving the envisioned future of Village Place and Pinehurst South.

The PDO regulations were adopted in accordance with the then current, *2010 Comprehensive Long Range Village Plan,* as well as all other then current Village plans and policies, in order to accomplish the following goals:

» Preserve and enhance the unique character and ambience of the entire community, especially the historic Village Center;

» Enhance the quality of life for present and future residents;

» Guide growth or change in ways that complement the unique character and ambience of the community

» Address community needs in the most efficient and cost-effective manner; and

» Maintain the legacy of Pinehurst for future residents and visitors to enjoy.

While these goals remain valid, since the adoption of the PDO, several additional planning efforts have been undertaken, including the *2019 Comprehensive Plan.* Along with many other key strategies and recommendations, the new comprehensive plan called for a full update to the PDO, specifically to include corridor standards, conservation subdivision standards, and character-based zoning concepts. The Small Area Plan (SAP) effort, and the following summary, builds off of this *2019 Comprehensive Plan* key recommendation.

For the SAP, the consultant team focused on the following sections of the PDO.

SECTION 8.2 GENERAL USE ZONING DISTRICTS

The General Use Zoning Districts section of the PDO provides land use regulations for nineteen (19) districts allowing for a variety of uses appropriate to the character of each individual district. The following items were noted as concerns for this section, relative to the SAP effort:

» Section 8.2.5 defines R-10, R-8 and R-5 as High-Density Residential Zones, however, high-density uses (such as Multi-family and Townhouse Dwellings) are not permitted by the Section 8.5 Table of Permitted Uses. Only Single-Family Dwellings are permitted and are not considered a high-density type.

» In addition to the specific item listed above, generally, the Euclidian or used-based zoning districts are counter to the recommendation in the *2019 Comprehensive Plan* for character-based zoning. The Form-Based Codes (FBC), to be developed as part of this SAP effort, in contrast, align with the comprehensive plan's recommendation and will shift the focus from use-based zoning to building form and character. The FBC are intended to supplant the current PDO for Village Place and Pinehurst South areas only.

SECTION 8.5 & 8.6 TABLE OF PERMITTED USES & SPECIAL USES

Section 8.5 of the PDO contains a list of uses which may be permitted in one or more of the various General Use Zoning Districts established by the Ordinance. While Section 8.6 defines the Special Requirements as called for in Section 8.5. The following items were noted as concerns for these sections, relative to the SAP effort:

» There are several terms used in the Table of Permitted Uses & Special Uses which are inconsistent or in conflict with Section 10.2 Definitions. These terms may be limiting or unintentionally promote certain uses in areas that are not intended by the PDO. In particular, the following items were noted:

- The terms "Industry, Heavy" and "Heavy" while used in Section 10.2, are not included in the Section 8.5. It is unclear where uses in this category would be classified in Section 8.5.
- In regard to Senior Housing, Section 8.5 lists the categories "Residential Care Facilities (More than 6 Residents)" and "Child/Adult Daycare Center". These terms do not address the additional uses listed in Section 10.2 as defined under "Nursing Home: Adult Care Home , Assisted Living Residence, Continuing Care Retirement Community, and Hospice". Therefore, it is unclear whether these additional uses were intentionally omitted and, if so, why.
- Section 8.5 does not include "Office", as defined in Section 10.2 as "general business office, government offices, insurance offices, law office and real estate and management offices". The specificity of the uses listed in the table may be problematic for certain types of office that may be desirable.
- The term "Dwelling - Mixed Use" is used in Section 8.5, however, it is unclear whether the term "Live-Work Unit" (as defined in Section 10.2) is included as a Dwelling-Mixed Use. This may potentially limit the ability for development of Live-Work units.

» SR-3 Dwelling, Multi-Family:

- The minimum size for a multi-family dwelling is one thousand five hundred (1,500) heated square feet. This size is well outside the typical unit size and may preclude new development from occurring and/or providing a range of unit sizes to meet market demand.

SECTIONS 9.1 & 9.2 TABLE OF DIMENSIONAL REQUIREMENTS

Section 9.1 of the PDO defines the minimum design and development standards for all buildings, sites, and infrastructure. While Section 9.2 defines the dimensional requirements for all uses and structures in the General Use Zoning Districts.

The following items were noted as concerns for these sections, relative to the SAP effort:

» Minimum Front Yard Setback: The minimum front yard setback for the majority of districts is greater than or equal to 20'. This may be problematic for smaller infill lots and/or to allow for a street frontage that relates to a pedestrian scale where building frontage is desirable and helps to create an engaging streetscape.

» The Minimum Rear Yard Setback in most districts is a minimum of 20' or more. This may preclude the redevelopment of small infill lots or lots that do not require on-lot parking and/or are rear-loaded.

» As written, the principal building as well as other structures including decks, landings, terraces, porches, and patios (with minimal exclusions) shall not be located within setbacks (*see 9.1.E.2*). This standard may unintentionally eliminate desirable building elements (such as deep front porches and bay windows).

» Building Height: While "Dwelling - Multifamily" is a permitted use in the VCP and VR districts, the building height is limited to 35', thereby limiting these buildings to 2 stories with a sloped roof (unless placed in an off-hill site condition or designed with a flat roof). As noted under Section 10.2 below, Building Height is measured to the highest point of the roofline, which precludes a 3-story building with a properly sloped roof and may unintentionally force a flat roof or a truncated sloped roof with a well.

SECTION 9.14 DESIGN STANDARDS FOR SINGLE FAMILY DWELLINGS & 9.3 VILLAGE DISTRICT DESIGN STANDARDS

Section 9.14 of the PDO defines design standards for Single-Family Dwelling development to ensure it is compatible with existing development and consistent

with its site and surroundings. While Section 9.3 defines design standards for the Village Districts to promote development that is functionally and structurally compatible with the existing Village Center and pedestrian area.

The following items were noted as concerns for these sections, relative to the SAP effort:

- While the landscape design standards in Section 9.14 go into some detail and specify minimum quantities, the Exterior Building Materials portion is very limited (due to the restrictions placed on one- and two-family dwelling design standards by the state). The majority of this section is focused on process rather than design standards.
- The Village District Design Standards are applicable only to the following districts: Village Mixed Use, Village Cottage Professional, and Village Residential. Therefore, the following residential districts, R-5, R-8, R-10, R-15, R-20, R-30, R-210, and R-MF, as well as Office Professional (OP) district do not have design standards, limiting the design oversight of these areas.
- Certain standards are vague or impractical; e.g., shake is limited to 15% per block, requiring the architect or builder to calculate every facade on the block in lieu of their proposed building only and allowing the first buildings to consume a full block's allotment of shake; facade lighting standards address glare, but do not address light trespass, full cut-off fixtures to protect the night sky, light temperature, or energy-conserving lamps; public spaces shall be incorporated in the Village Mixed-Use District, but no other districts and there is mention of minimum size, frequency, appropriate types, amenities, and similar.

SECTION 10.2 DEFINITIONS

Section 10.2 of the PDO contains definitions of words used within the ordinance. The following items of concern were noted for this section:

- Building Height is defined as "the vertical distance measured from the average elevation of the proposed finished grade at the front of the building to the highest point of the roof". The preferred method requires building height to be measured to the eave or to the midpoint of the roof, allowing properly pitched roof slopes and tall floor-to-ceiling heights reflective of the Village's architectural character.
- Live-Work Units are defined as "variations of either the detached house building type or the townhome building type". It is recommended to also include Dwelling - Mixed Use to coordinate with the Table of Permitted Uses & Special Uses in Section 8.6.
- The use of the phrase "detached house" should match "Dwelling, Single Family".
- "General Retail" is a term used in Section 8.5, however is not defined in Section 10.2.

To see current zoning districts and permitted uses that exist within the Small Area Plan boundaries, see pages 22-23 of this document.

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2.0 EXISTING CONDITIONS

2.1 OVERVIEW

2.2 EXISTING CONDITIONS

2.3 MARKET ANALYSIS SUMMARY

Existing Conditions

Located just north of the Village Center, Village Place is approximately 100 acres and is characterized by a mix of community-supportive amenities as well as undeveloped or under-utilized properties that are out of character with the intended vision for the area. As this area is directly adjacent to Village Center, a portion of the plan area falls within the Pinehurst National Historic Landmark District.

The vision, as outlined in the Comprehensive Plan, is to create a more mixed-use, walkable area that is more conveniently connected to the Village Center. Village Place offers the unique opportunity to expand the footprint of Pinehurst's historic center and establish stronger visibility from the north along NC-211.

To ensure the small area plans support the Village's vision, the design team conducted a thorough assessment and inventory of existing conditions to understand the historic, cultural, environmental, social, market, and economic assets of Pinehurst.

The plan builds on the strengths of the existing conditions; upholds the planning principles of the original Tufts, Olmsted, and Manning vision and plan; and extends the Village's small-town scale, architectural character, and walkability outward rather than allowing auto-oriented commercial development to creep inward over time.

This section includes the photographs, diagrams, and conclusions of this documentation and analysis phase, which was then used, along with stakeholder input, as the groundwork for the concept planning phase (phase 2).

The Existing Conditions and Analysis information includes:

- Existing Illustrative Plan
- Figure Ground Plan Diagram
- Historic District Plan Diagram
- Street Network Plan Diagram
- Posted Speed and Traffic Control Plan Diagram
- Land Use Plan Diagram
- Zoning Plan Diagram
- Topography Plan Diagram
- Open Space + Trails + Sidewalk Plan Diagram
- Market Analysis Summary

The following observations were made as part of the Existing Conditions study:

- Open space currently abundantly surrounds Village Place, with Rassie Wicker Park to the northwest, the Village Arboretum to the west, and Cannon Park and the Community Center to the northeast. However, there is a lack of smaller open spaces and pedestrian connections between these destinations
- Pinehurst Elementary School is located just outside of the Village Place plan area boundary, but should be considered as an important destination for this planning effort.
- Pinehurst Brewery is an asset to this area and was highlighted as the most visited place, within the plan area boundary, for stakeholders. The concept for Village Place should leverage this existing asset
- There is an assembly of civic buildings along Magnolia Road, including Village Hall, the Pinehurst Police Department, and the Pinehurst Fire Department that create a destination and draw outside of the Village Center.
- There is a range of residential architecture in Village Place, some of which is in keeping with the historic character of the Village and some that appears quite out of place, both in style and detail.
- South of McCaskill Road, the Village of Pinehurst Public Service Facility consumes a large amount of land that creates a visual eyesore and a physical boundary to Village Center, with large industrial buildings and significant truck traffic. Additionally, there are two existing water tanks which have become obsolete and could be used as a future development opportunity. Overall, the area remains largely industrial or under-utilized and not pedestrian friendly in its current state.
- The "Greens at Arboretum" is a recently built multi-family building at the corner of Magnolia and McCaskill Roads that has received mixed feedback from the community due to its scale and use. A second phase of this project is planned to be, and approved as, a two-story, mixed-use building at the corner of Rattlesnake Trail and McCaskill Road, with multi-family residential units above ground commercial.
- In the area between Kelly Road to the north and McCaskill Road to the south, there is a mixture of small commercial buildings, including but not limited to: The Village Cafe, Maxie's Tap Room & Grill, Pinehurst Pizza, Clark Chevorlet Cadillac Inc., and the Village Barbershop. While the scale of most of these commercial buildings is in keeping with the historic character and brick sidewalks have been installed, the building placement and intermittent frontage, as well as the parking configurations and multiple access points, creates a haphazard environment that is not conducive to pedestrian or bicycle circulation.



Pinehurst Brewery
Credit: Barstool Sports, Inc.



Convenience Store - Rattlesnake Trail
Source: Google



Moore County Water Tanks
Source: Design Collective



VOP Public Service Facility
Source: Google



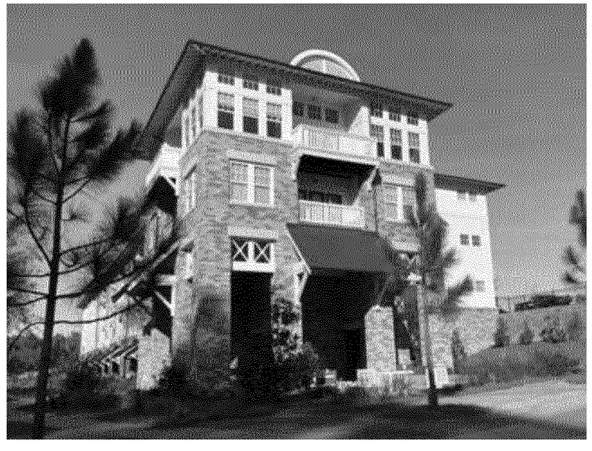
Cannon Park Community Center
Source: Design Collective



Commercial - Clark Chevrolet Cadillac
Source: Google



Commercial - Hughes Plumbing
Source: Google



Multi-family Residential - The Greens at Arboretum
Source: Design Collective



Retail - Tater Barn
Source: Design Collective

Illustrative Site Plan

The Existing Illustrative Plan depicts the development and open space patterns that exist in the study area. A 1/4-mile walking radius (5-minute walk) is indicated on the plan for reference.

KEY

- SMALL AREA PLAN (SAP) BOUNDARY
- VILLAGE OF PINEHURST
- BUILDING FOOTPRINTS
- PARKS/ OPEN SPACE

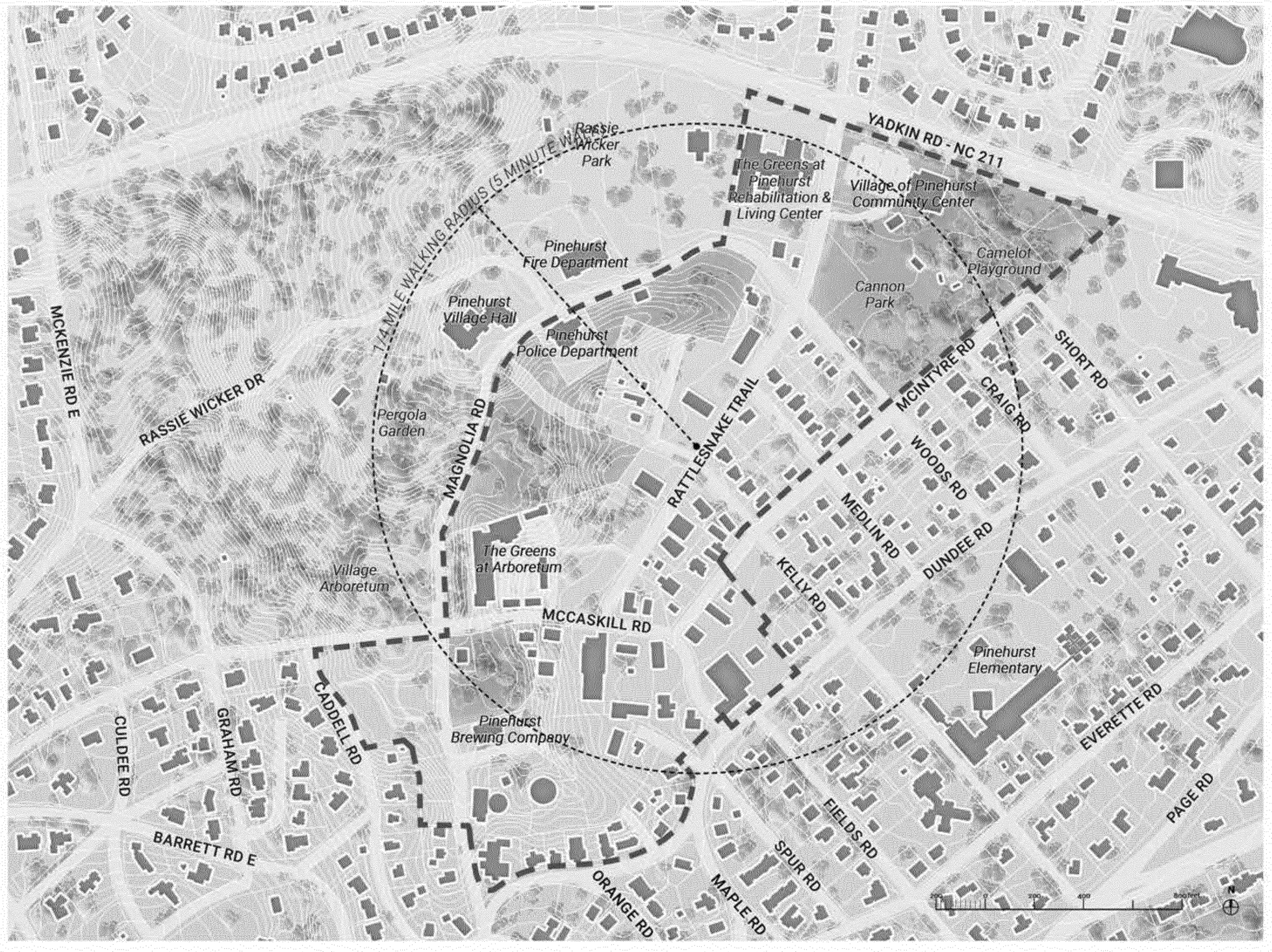
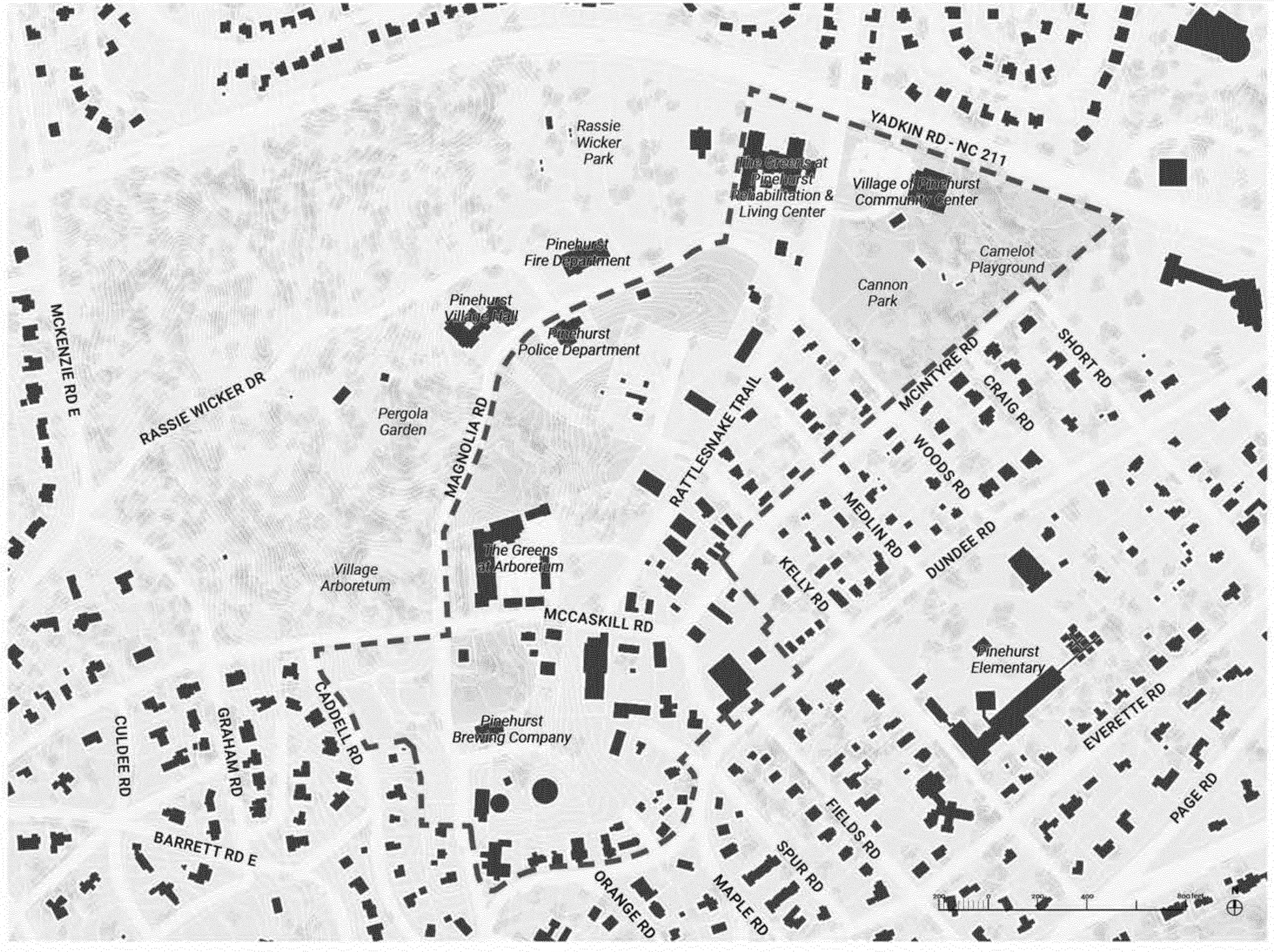


Figure Ground

The Existing Figure Ground plan shows the relationship of built and unbuilt space in Village Place. The development patterns in the study area are characterized by single-family detached residential lots surrounded by a mix of non-residential uses and undeveloped properties. The single-family detached residential lots are located primarily between Dundee Road and Rattlesnake Trail, north of McCaskill Road. Institutional buildings such as the Pinehurst Village Hall, Pinehurst Police and Fire Departments, the Village of Pinehurst Community Center, and Pinehurst Elementary are scattered throughout Village Place, primarily surrounding the residential blocks. Larger commercial and industrial building footprints are located along and to the south of McCaskill Road, closer to the Village Center.

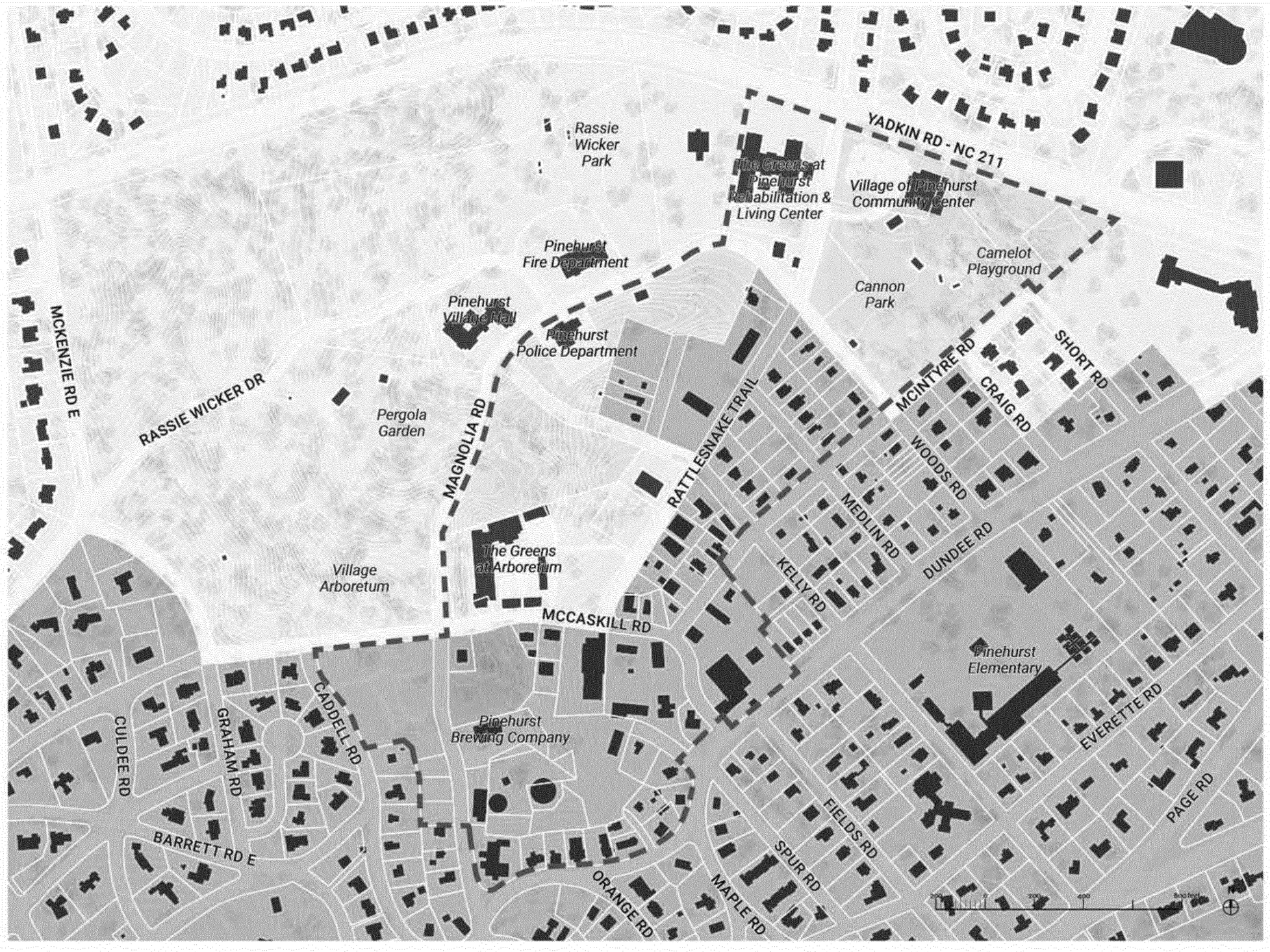
KEY

- SMALL AREA PLAN (SAP) BOUNDARY
- VILLAGE OF PINEHURST
- BUILDING FOOTPRINTS



Historic District

The Historic District is comprised of properties that fall within the National Historic Landmark district or that were surveyed and identified as important fixtures within the community. These properties are subject to additional review by the Historic Preservation Commission and the Historic District Standards to ensure the history and charm of the Village of Pinehurst is preserved.



Existing Street Network

Village Place is well connected to a range of arterials. Yadkin Road - NC 211 lines the north side of the plan area boundary providing direct access to US 501 just east of the plan area.

Neighborhood streets are organic and somewhat disconnected due to large, undeveloped land areas and topographic conditions within the plan area.

KEY

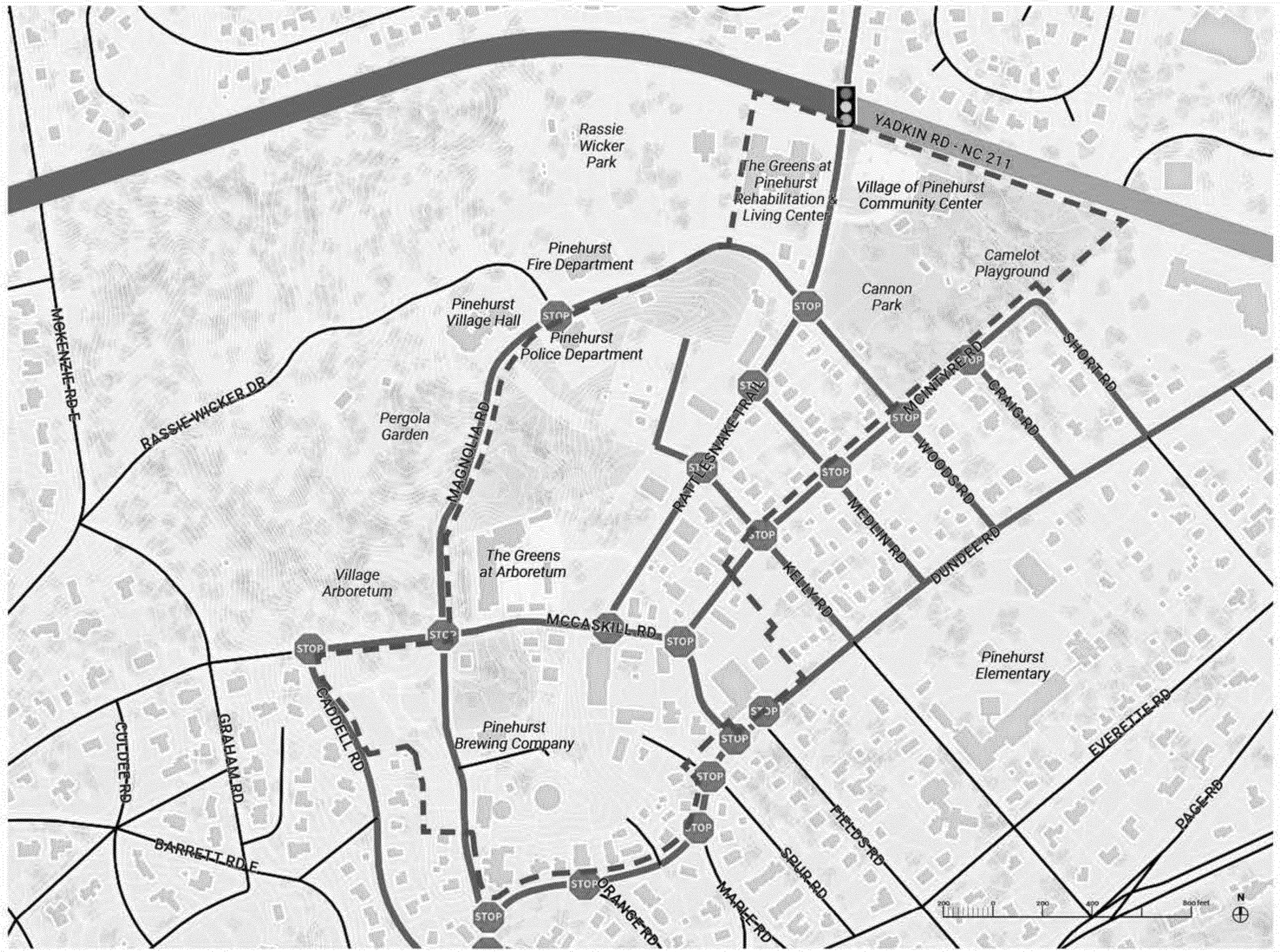
- SMALL AREA PLAN (SAP) BOUNDARY
- VILLAGE OF PINEHURST
- EXISTING ROADS
- EXISTING DEAD END



Replace Roboto Condensed

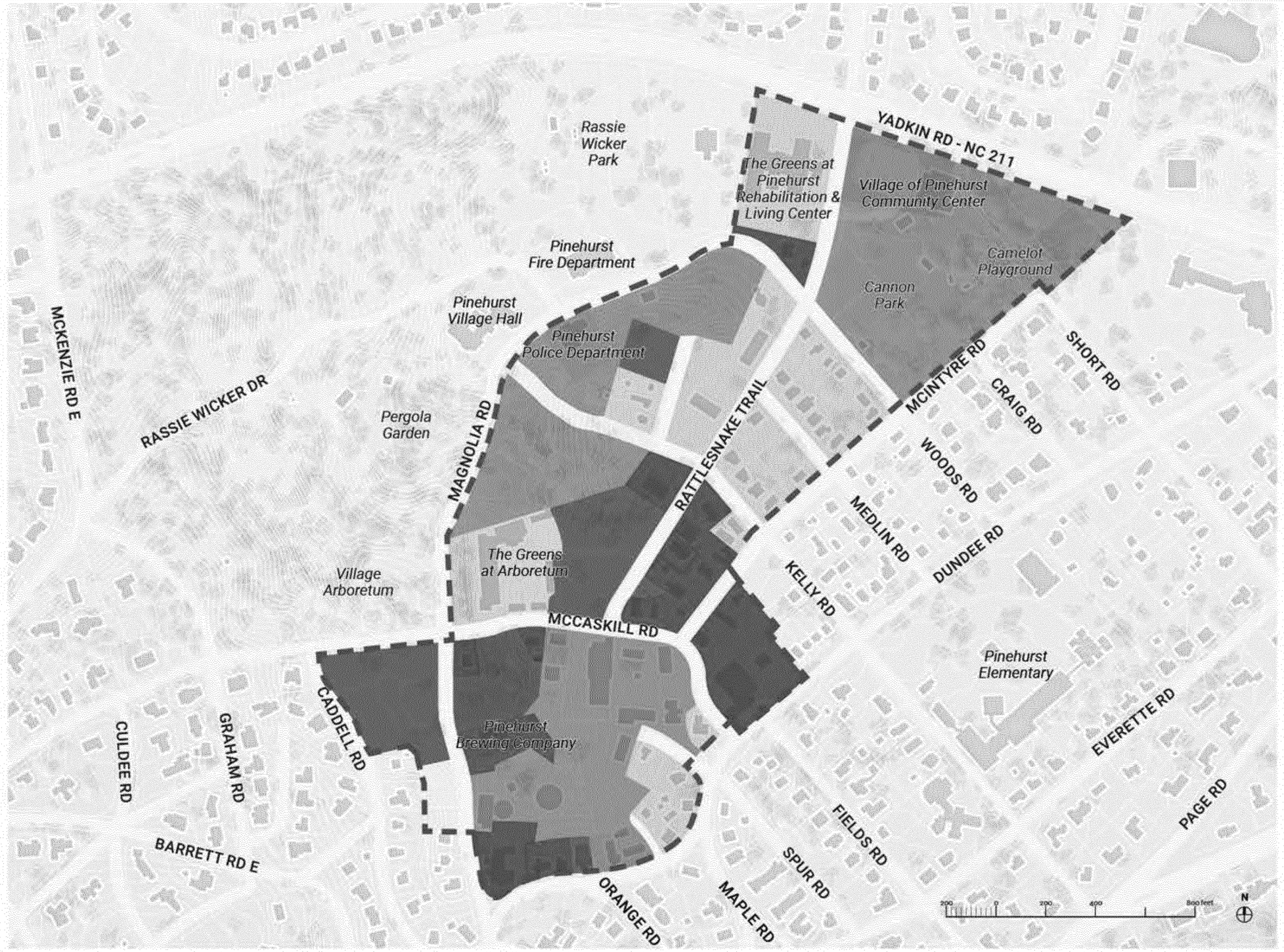
Posted Speed and Traffic Control

All of the streets within the study area boundary have posted speeds of 25 mph. Stop signs are located at most intersections with a traffic signal placed at Rattlesnake Trail and Yadkin Road - NC 211 for added control and safety.



Land Use

The study area includes a wide range of land uses that are mixed throughout its boundary. A majority of the residential uses and parks and open spaces exist within the northern half of the study area. More retail, civic, and industrial uses are located in the southern half, closer to the Village Center. Vacant parcels are interspersed throughout the study area.



Zoning

The north half of the study area is primarily zoned a mix of Residential (R10) where single-family detached residential housing exists, surrounded by Public Conservation (PC) where parks and open space are located. The south half of the study area, closer to the Village Center, is zoned a mix of Neighborhood Commercial (NC) and Village uses, including Village Mixed-Use (VMU), Village Cottage Professional (VCP), and Village Residential (VR).



KEY

- SMALL AREA PLAN (SAP) BOUNDARY
- VILLAGE OF PINEHURST
- R8 - RESIDENTIAL
- R10 - RESIDENTIAL
- R20 - RESIDENTIAL
- R30 - RESIDENTIAL
- RMF - RESIDENTIAL MULTIFAMILY
- VR - VILLAGE RESIDENTIAL
- HD - HOSPITAL DEVELOPMENT
- NC - NEIGHBORHOOD COMMERCIAL
- OP - OFFICE & PROFESSIONAL
- PC - PUBLIC CONSERVATION
- RD - RECREATIONAL DEVELOPMENT
- VC - VILLAGE COMMERCIAL
- VCP - VILLAGE COTTAGE PROFESSIONAL
- VMU - VILLAGE MIXED USE

Existing Zoning and Permitted Uses

The following zoning districts exist within the Village Place Small Area Plan boundary. For a full matrix of all zoning districts and permitted land uses, reference Section 8.5 of the *Pinehurst Development Ordinance* (PDO).

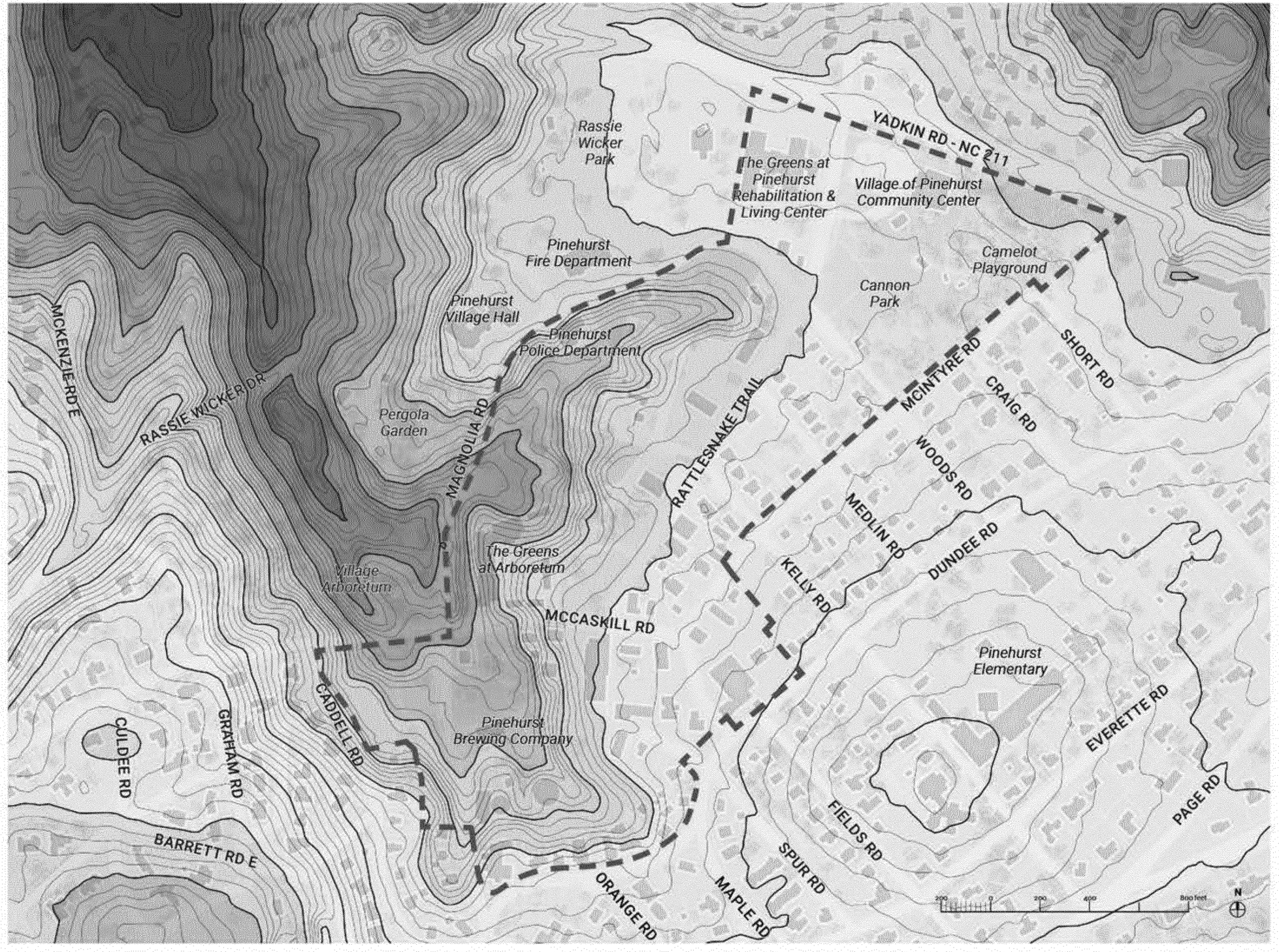
KEY

- ✓ PERMITTED USES
- SR SPECIAL REQUIREMENTS, SEE SECTION 8.6
- SU SPECIAL USE PERMIT REQUIRED, SEE SECTION 4.5
- ✗ PROHIBITED USES

		USES																			NOTES
		DWELLING - SINGLE FAMILY	DWELLING - TWO FAMILY	DWELLING - MULTIFAMILY	DWELLING - TOWNHOUSE/ CLUSTERED DWELLINGS	DWELLING - MIXED USE	BED AND BREAKFAST HOMES	HOTEL	MEDICAL CLINIC	PERSONAL SERVICES	PROFESSIONAL SERVICES	GENERAL RETAIL	RESTAURANT	CIVIC/CULTURAL FACILITIES	RESIDENTIAL CARE FACILITIES (> 6 RESIDENTS)	PARKING STRUCTURE		Maximum Building Height	
	R10 - RESIDENTIAL	✓	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗		35'	*Intended principal use of land is high-density residential uses*
	VR - VILLAGE RESIDENTIAL	✓	✓	SR	SR	✗	SR	✗	✗	✗	✗	✗	✗	✗	✗	SR		35'	*Intended principal use of land is multi-family and single-family dwellings in close proximity to the Village Center*
	NC - NEIGHBORHOOD COMMERCIAL	✗	✗	✗	✗	SR	✗	✗	✓	✓	✓	SR	SR	✓	✓	✗		35'	*Intended principal use of land is small scale commercial, retail, office and service to residential districts*
	PC - PUBLIC CONSERVATION	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✓	✗	✗		35'	*Intended to preserve and environmentally sensitive land*
	VCP - VILLAGE COTTAGE PROFESSIONAL	SR	SR	SR	SR	SR	SR	✗	✗	✓	✓	SR	SU	✓	✗	✗		35'	*Intended to provide limited office and retail development and a wide variety of housing*
	VMU - VILLAGE MIXED USE	SR	SR	SR	SR	SR	SR	SR	✗	✓	✓	SR	SR	✓	SU	SR		50'	*Established as a pedestrian-scaled district which caters to everyday needs of neighborhoods*

Topography

The topography of the study area is characterized by a natural ridge line that extends along Rattlesnake Trail, from the study area's southern boundary to the northern boundary at Cannon Park. The grade slopes downward west of Rattlesnake Trail and upward to the east of Rattlesnake Trail and to the south.

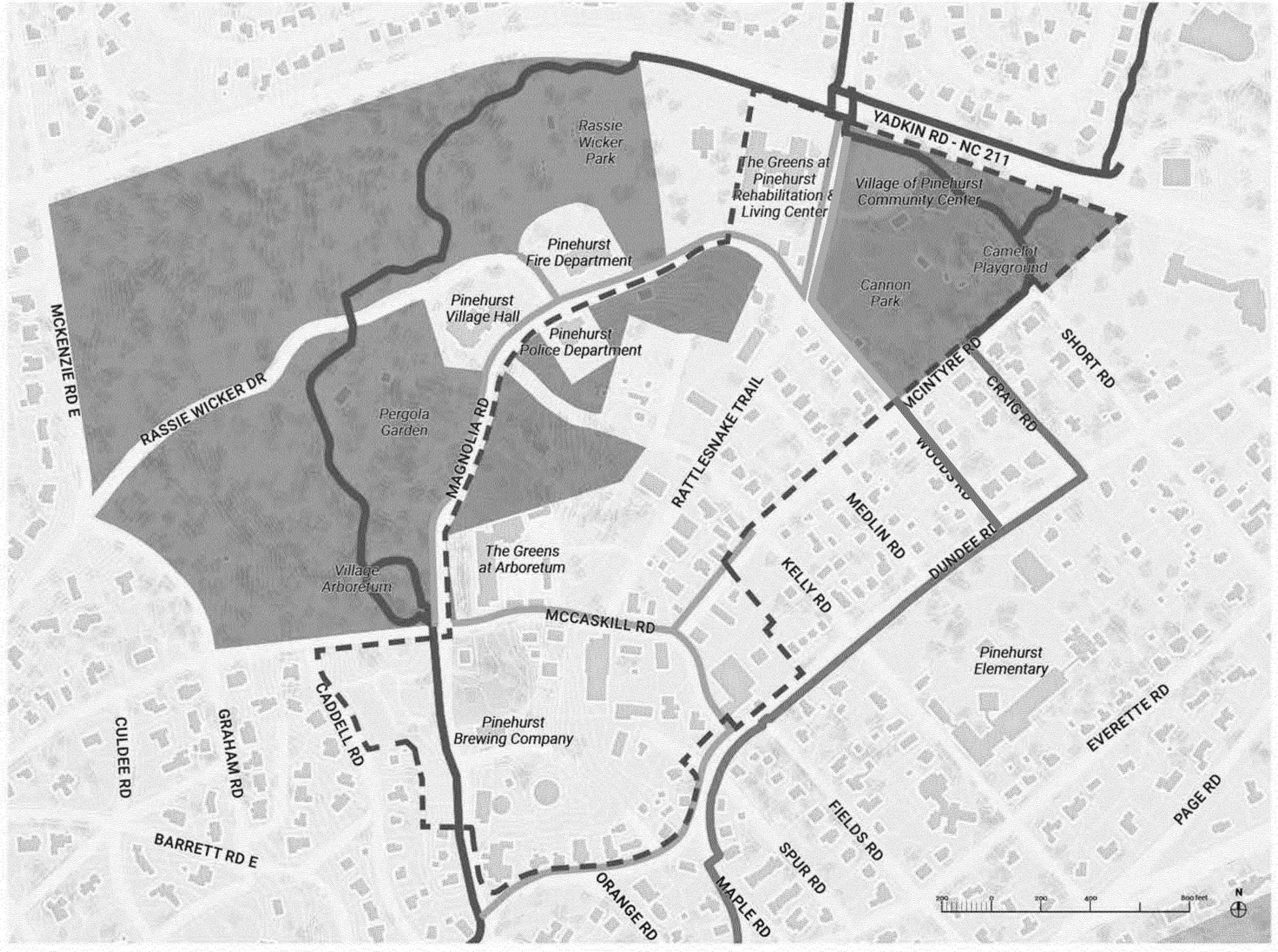


Open Space + Trails + Sidewalks

The study area is well served with open space consisting of a series of active and passive parks and gardens. Cannon Park, located to the north, is a 15-acre park with recreation fields and play space. Along Magnolia Road are a series of open spaces that cover the steep slopes west of Rattlesnake Trail and are an extension of Rassie Wicker Park. The community park is a 103-acre facility that includes a variety of recreational courts, splash pad, playground, a 33-acre arboretum, and several manicured lawns and gardens to host a wide range of events. Throughout the study area is a network of trails, including greenway trails, walkway trails, and sidewalks.

KEY

- SMALL AREA PLAN (SAP) BOUNDARY
- VILLAGE OF PINEHURST
- GREENWAY TRAILS
- WALKWAY TRAILS
- SIDEWALKS
- PARKS/ OPEN SPACE



Background and Objectives

A Market Analysis report was prepared by Duggal Real Estate Advisors, LLC (DREA); the following pages provide a summary; the full report can be found on the project website: https://engage.vopnc.org/smallareaplans. The data was collected in November and December 2020 and January 2021.

The market analysis is one step in the process to determine the feasibility of land uses within the Village of Pinehurst and the plan areas. It ascertains the quantitative and qualitative aspects of demand for land uses that might be appropriate for future development in the plan areas and quantifies the potential scale and timing of these uses.

The plan area for Village Place encompasses approximately 100 acres in size and 70 different parcels. This area is immediately north of the historic Village Center and stretches out to NC 211.

Summary of Market Opportunity

For the market analysis, DREA examined six different land uses: for-sale residential, for-rent residential, retail, office, hospitality, and golf. The following is a summary of the opportunity for each of the land uses in the Village Place plan area.

The overall market opportunity takes into account the current and projected future market conditions, future demand potential, and the suitability for the land use within the Village.

Summary of Demand

For each of the land uses, DREA completed a demand model to understand the future potential of the land use within the Village or Moore County, depending on the land use. To determine how much of each land use would likely locate within the plan areas, it was necessary to consider where else within the Village the land use could be located. For example, if there is demand for one rental project every three to eight years within the Village, it cannot be located in both planning areas, but in reality, it could be located in either one or another location in the Village, making it difficult to assign demand.

For many land uses, there has been and will be more demand for the product type within the Village than the amount of supply that has been or will be available (i.e., more houses would likely sell if they were available).

Summary of Demand for Land Uses within Plan Areas

DREA then considered how much of the demand could be located within the plan areas if the area was zoned for it, landowners were interested in selling, and developers would build it. While the market analysis quantifies realistic development opportunities, actual land use allocation is guided by planning exercises, site constraints, the desired vision, and stakeholder input, in balance with market demand.

The potential for most of the land uses is present in both plan areas. Although there is some flexibility in these numbers as stated before, DREA put together guidelines based upon the market to help the planning team understand the magnitude of demand in each of the plan areas. Below is the demand summary for Village Place.

For-Sale Residential

- Would likely be infill development or part of a small, mixed-use development.
- Most likely small lot single-family detached or attached product. Attached product would include both townhome style and condominium style product.
- The demand for this product is deep, and the plan area can support as much for-sale product as desired, from a market demand standpoint.
- Pricing would vary based upon product type and positioning, but would likely be in the range of $300,000 to $500,000.

For-Rent Residential

- Could either be stand-alone or within a mixed-use project. Would likely be horizontal mixed-use as opposed to vertical mixed-use (e.g., the apartments are next to the retail and office, not above) given the rent ranges possible to achieve and the cost of construction. If rents rise to support residential over commercial, that would be an appropriate land use here as well.
- Most likely size of an apartment complex would be similar to The Greens at Arboretum (70-100 units).
- Rents would be similar to the newest apartments at the time of construction. At this point, the newest apartments in the market are The Greens at Arboretum at approximately $1.35/SF.
- At an average size of approximately 1,000 square feet, that would equate to a rent of approximately $1,350 per month.

Retail

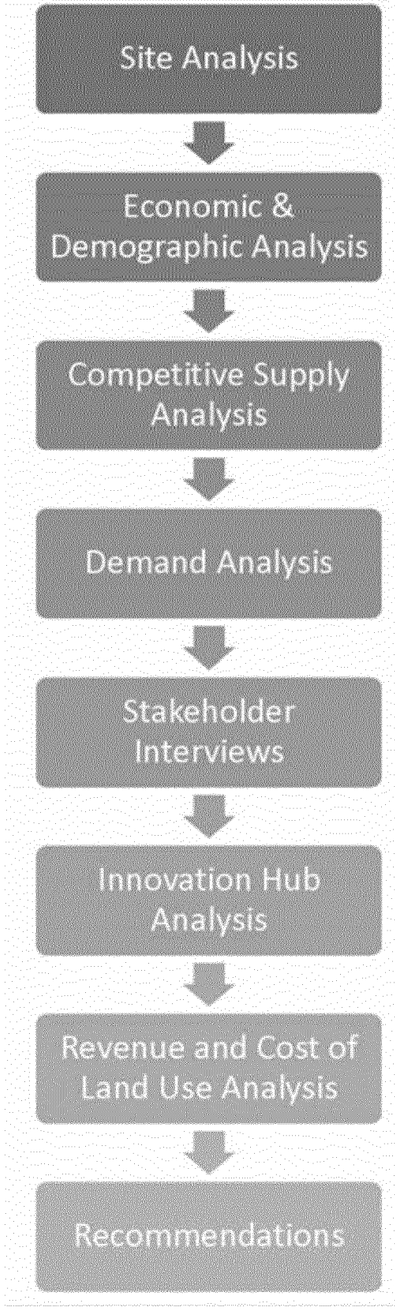
- The retail would not be in the form of a standalone shopping center, unless the retail was located along NC 211. Given the current uses, it is unlikely that there would be a shopping center in the plan area along NC 211.
- The retail would be part of a mixed-use area or more small retail shops like currently exist along Rattlesnake Trail.
- The demand for retail is more limited in this configuration, and would be limited to 25,000 to 50,000 SF total at build-out.
- Rents would need to be $24-$30/SF to support new construction.
- Tenants would include those that support local residents and tourists (such as flower shops, gift shops, pharmacies, home goods, salons, restaurants, shoe stores, boutiques, and others). The demand is strong for a variety of retail shops.

Office

- Office would be a supportive land use to the mixed-use area. It would be small offices, primarily locally-serving, including medical office.
- Given the amount of retail that could happen, DREA anticipates the office to be less than or equal to the amount of retail, therefore, 25,000 to 30,000 SF of office at build-out.
- Rents would be in the $18-$22/SF range.

Hospitality

- Village Place could support a hotel as well as bed and breakfasts. They would likely support tourists, and potentially people visiting the hospital.
- Hospitality could also include rental product within homes.
- New hotels in the area tend to have 75-100 rooms. Bed and breakfasts and similar tend to have far fewer rooms, typically less than 10.



Overall, Village Place offers a strong opportunity to develop a variety of land uses. Drawing upon the Village Center as inspiration, Village Place can complement what is already part of the community.

Strengths

- Location close to Village Center provides a strong foundation
- Community Center and Cannon Park
- Walkable to Village Center
- Large number of amenities
- Strong brand of Pinehurst
- Some redevelopment already occurring (Pinehurst Brewery)

Weaknesses

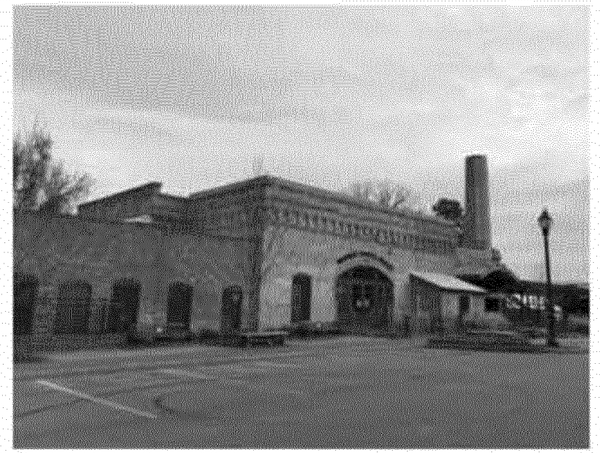
- Some of the properties are older
- Parking challenges
- Limited amount of available land

Opportunities

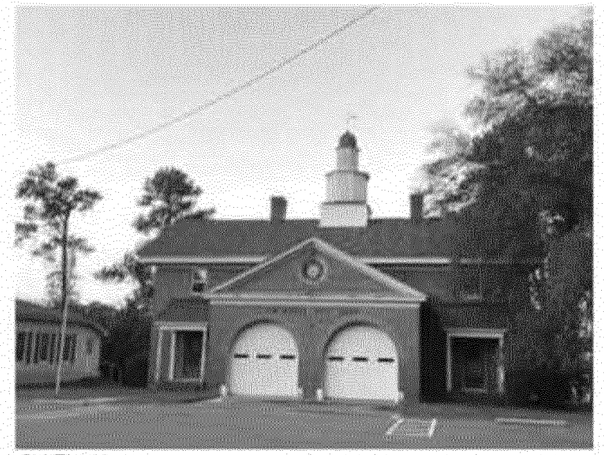
- Build off the success of historic Village Center
- Growth in nearby neighborhoods
- Redevelopment of public works
- Redevelopment of older properties
- Close to NC 211 – build a better gateway

Threats/Challenges

- Inability to create a strong link between Village Core and Village Place
- Not being able to move the tanks and public works



Pinehurst Brewing Company



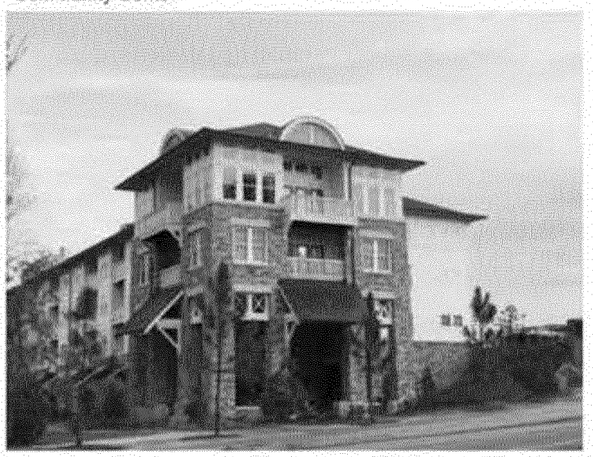
Old Fire House



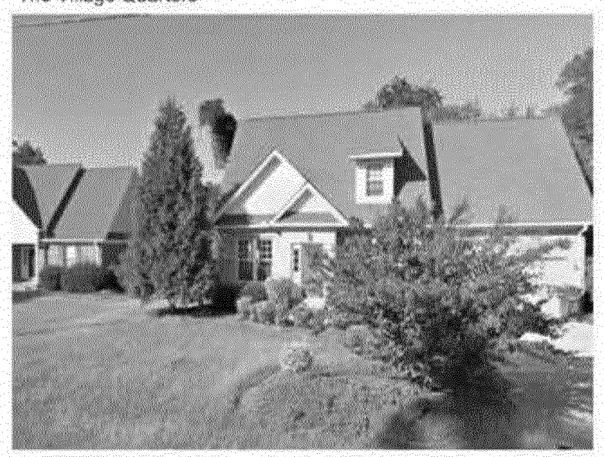
Community Center



The Village Quarters

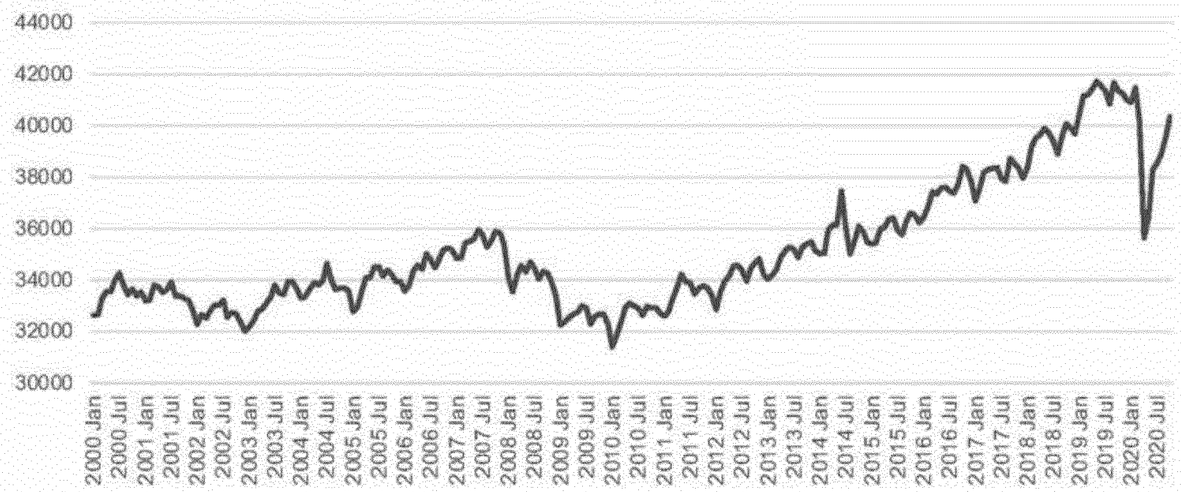


The Greens at Arboretum



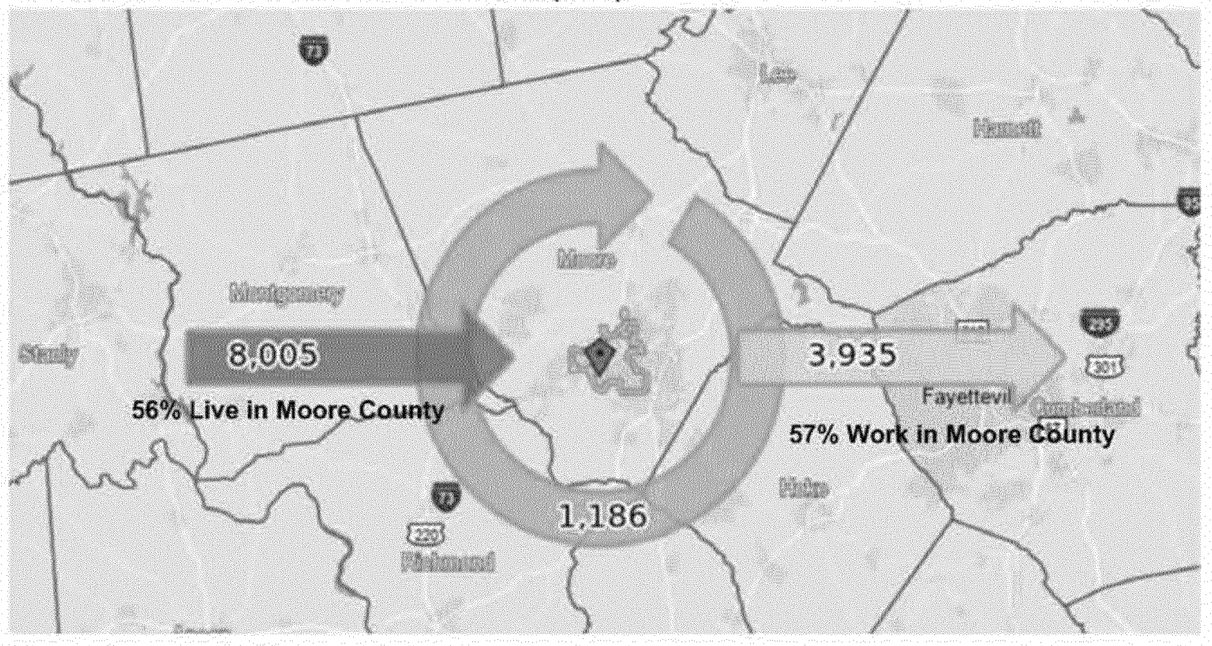
Single-family detached home

Moore County, NC Employment (2000-2020)



Source: BLS

Inflow and Outflow of Workers in Pinehurst (2017)



Source Census on the Map

Jobs by Industry in Pinehurst (2020)

Industry	Businesses	%	Employees	%
Health Care and Social Services	575	54%	5,880	52%
Accommodation and Food Services	42	4%	2,839	25%
Other Services - Repair, Personal Care, Laundry, Religious, etc.	69	6%	434	4%
Professional, Scientific, and Technical Services	58	5%	396	3%
Arts, Sports, Entertainment, and Recreation	23	2%	358	3%
Retail: Home, Food, Automobiles, Personal Care	35	3%	262	2%
Education	11	1%	257	2%
Real Estate and Rentals	47	4%	234	2%
Public Administration	12	1%	173	2%
Banking, Finance and Insurance	56	5%	145	1%
Construction	25	2%	89	1%
Information	12	1%	85	1%
Other	108	10%	248	2%
Total	1,073	100%	11,400	100%

Source: North Carolina Department of Commerce, Labor & Economic Analysis

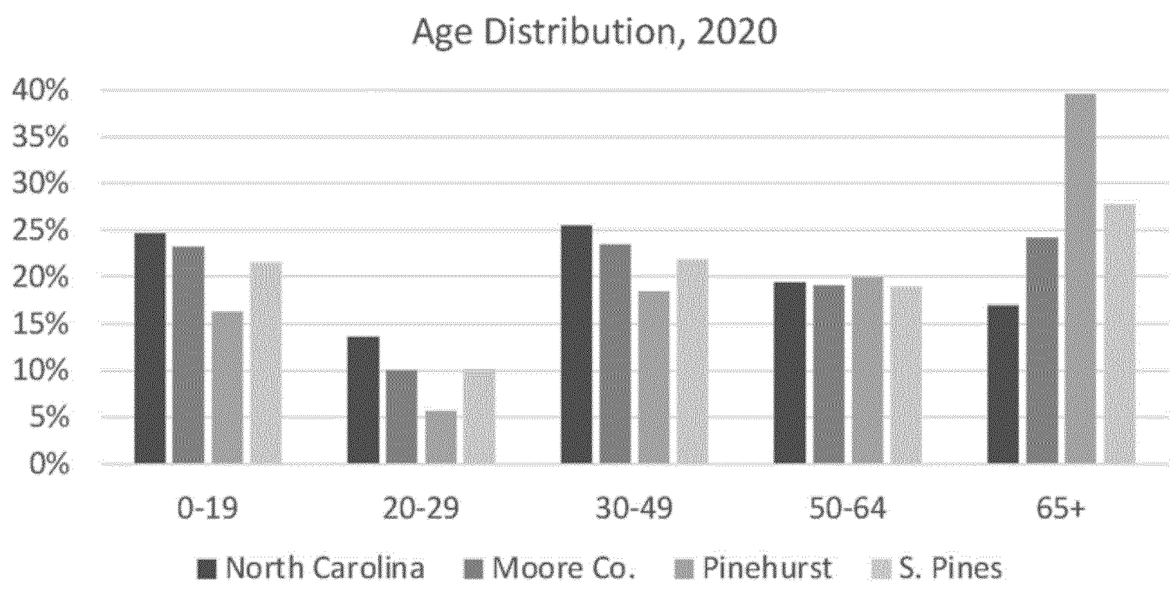
People Who Work in Pinehurst (Where Workers in Pinehurst Live)
Of the people that work in Pinehurst, approximately 50% of them are aged 30-54, while 32% are over the age of 55, and 18% are under the age of 29.

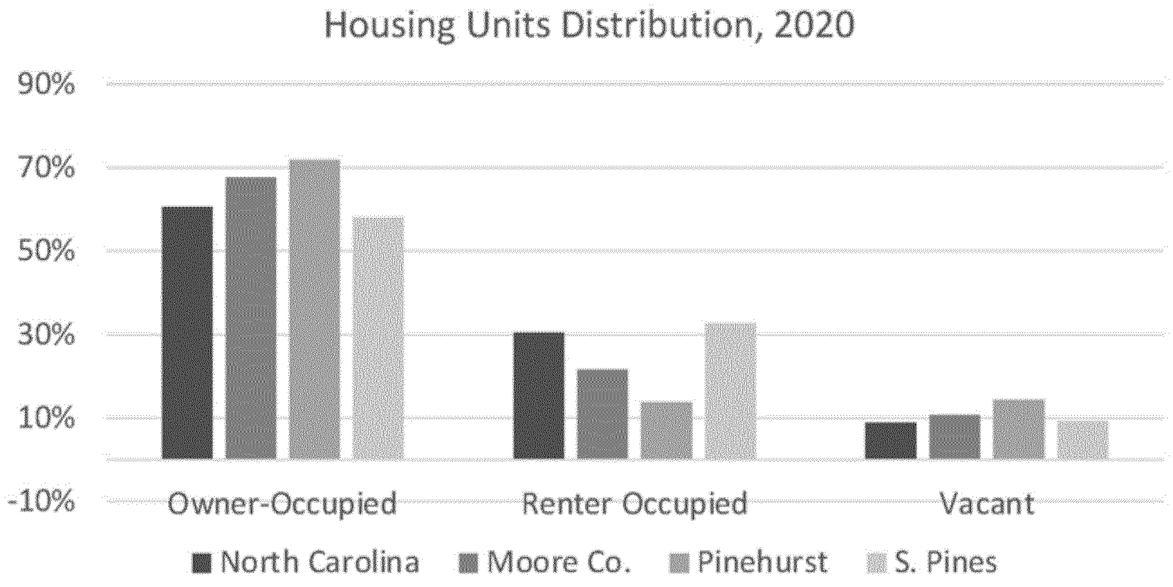
Almost half of the workers make more than $3,333 per month. Over 50% of the workforce has some college, an Associates degree, Bachelor's degree or higher.

Household Data for NC, Moore County, Pinehurst, and Southern Pines (2020-2025)

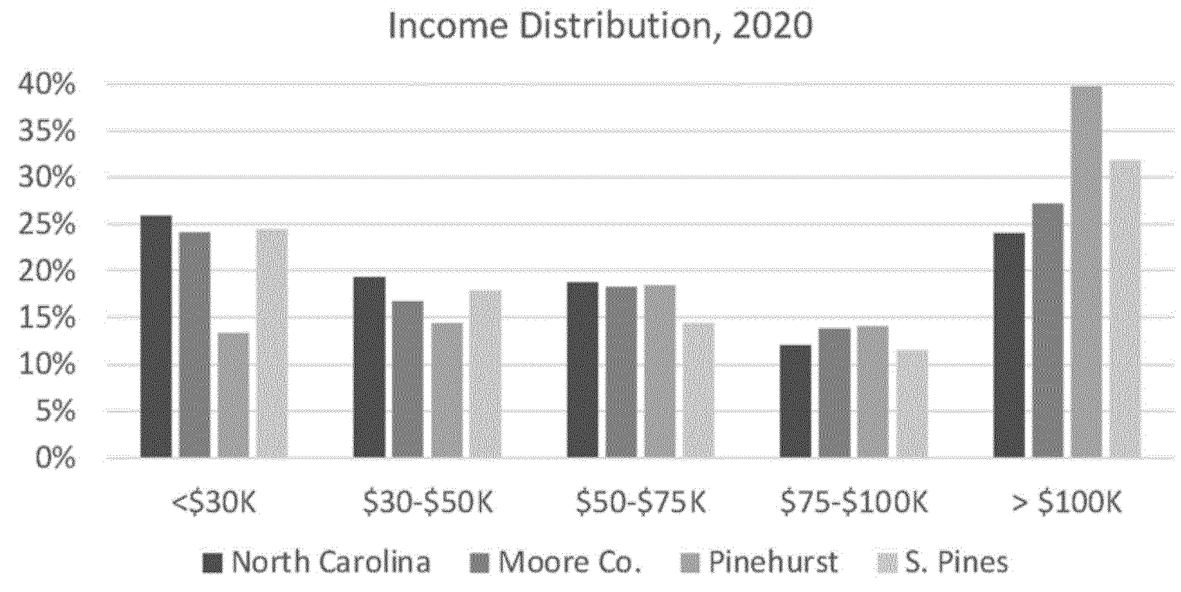
Geography	2020	2025	Growth	Annual Growth Rate
North Carolina	4,341,543	4,494,724	153,181	0.7%
Moore County	43,651	45,169	1,518	0.7%
Moore Co. as % of NC	1.0%	1.0%	1.0%	
Pinehurst Village	7,885	8,100	215	0.5%
Pinehurst as % of Moore	18.1%	17.9%	14.2%	
Southern Pines Town	7,142	7,207	65	0.2%
Southern Pines as % of Moore	16.4%	16.0%	4.3%	

Source: AccessNC, North Carolina Department of Commerce, Labor and Economic Analysis

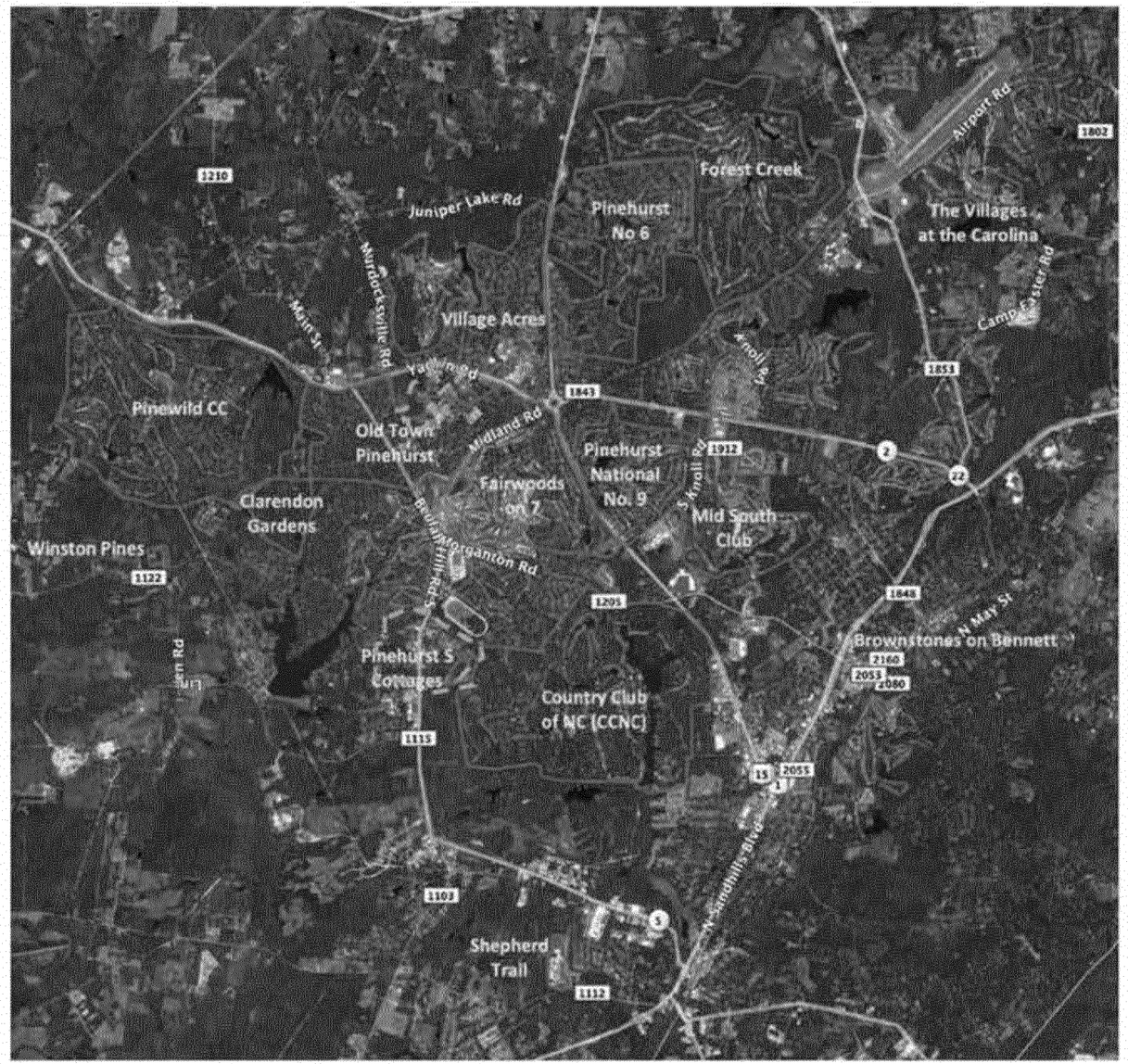




Source: AccessNC, North Carolina Department of Commerce, Labor and Economic Analysis



Source: AccessNC, North Carolina Department of Commerce, Labor and Economic Analysis



KEY

SMALL AREA PLAN (SAP) BOUNDARY

FOR-SALE COMMUNITY OUTLINE

Permits and sales continue to increase

Healthy market with strong demand fundamentals

For-sale in Pinehurst tends to be single-family detached

Demand is high

Home prices continue to rise in Pinehurst - still more attainable/affordable than similar housing in other parts of the country

New homes in non-golf oriented communities are $300,000 to $500,000 on average

New, infill housing in golf-oriented master-planned communities are $450,000 to $750,000

VP

Single-family homes selling in Village Place tend to be priced from $200,000 to $400,000. **Two new homes sold for approximately $300,000**

New product within the study area could be a combination of small lot single-family detached, townhome/attached, and possibly condominium product

The price point would likely be above existing homes within the study area

PS

There are very few for-sale houses within the Pinehurst South study area

Nearby townhouse community built in the late 1980s sells for approximately $180,000 and $230,000

For-sale homes would be marketable in the study area. There could be a combination of small lot single-family detached and townhome/villa product

The pricing would be above the existing product, and likely within the middle band of new houses in the Pinehurst area

Pinehurst is projected to see strong owner household growth over the coming years; both Village Place and Pinehurst South could capture this growth and help create new, walkable, mixed-use neighborhoods

For-Rent Residential



Vacancy continues to remain low (3%) despite the addition of 180 apartment units since 2020

Most Pinehurst rental product is single-family detached homes

Strong, in-balance apartment market

Demand is moderate

Rental rates, although not overly high compared to more suburban areas, have continued to rise in recent years

New rental product in Pinehurst is likely to rent at the higher end of the market, similar to The Greens at Arboretum

One bedrooms range from $1.43 to $1.63 per square foot, two bedrooms range from $1.18 to $1.26 per square foot, and three bedrooms range from $1.25 to $1.55 per square foot

The Greens, a relatively new apartment complex, is located within Village Place

Additional new for-rent residential would be marketable within the study area

It is walkable to the Village Core, is close to services and amenities, and close to open space

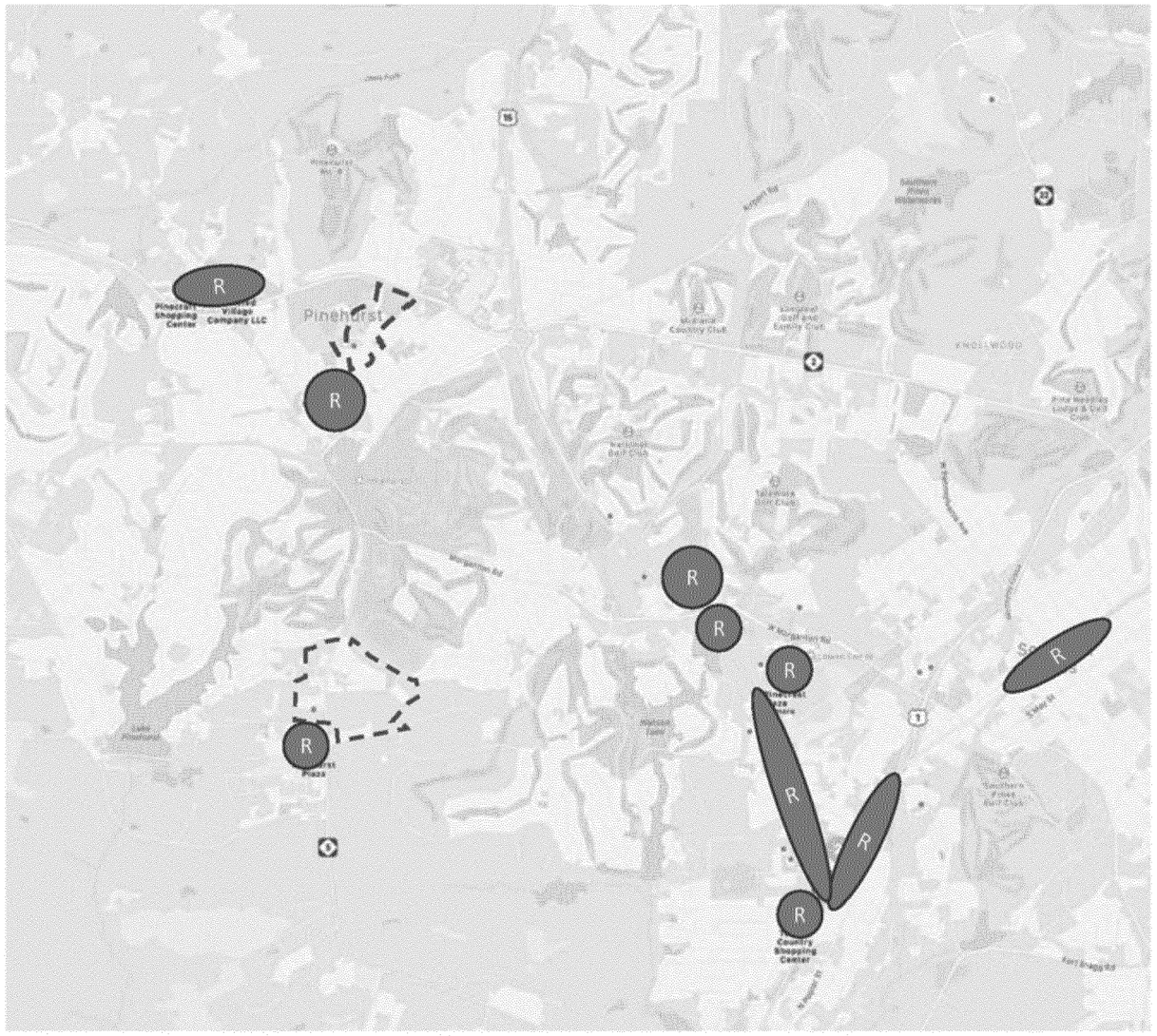
Pinehurst South currently has a rental townhome community, Abingdon Square Townhomes, and the Inn at Quail Haven Village, a senior continuing care retirement community (CCRC)

It would be a marketable location for a rental community

It would likley be positioned below new apartments in Village Place given it is not walkable and farther from services and amenities

Pinehurst is projected to see modest rental household growth over the coming years; both Village Place and Pinehurst South could capture this growth and help create new, walkable, mixed-use neighborhoods

Retail



KEY

SMALL AREA PLAN (SAP) BOUNDARY

R RETAIL SHOPPING

Retail occupancy is currently down due to Covid-19, but still performing relatively well compared to other similar parts of the state

Occupancy should increase after the pandemic is over

Demand is moderate, and tied to household growth

The average rental rate has been relatively stable

Rental rates are approaching the amount needed for new construction (roughly $24 to $30/SF)

VP

Village Place is adjacent to the Village Center

Small retail cluster along Rattlesnake Trail. This area could be built upon

Village Place would be an appropriate location for retail including restaurants, entertainment, tourist-oriented, and locally serving retail.

Larger format retail would prefer to be along NC 211, while smaller retail could be an extension of the Village Core, brewery, and retail along Rattlesnake Trail

PS

Pinehurst South is adjacent to some underperforming, older retail

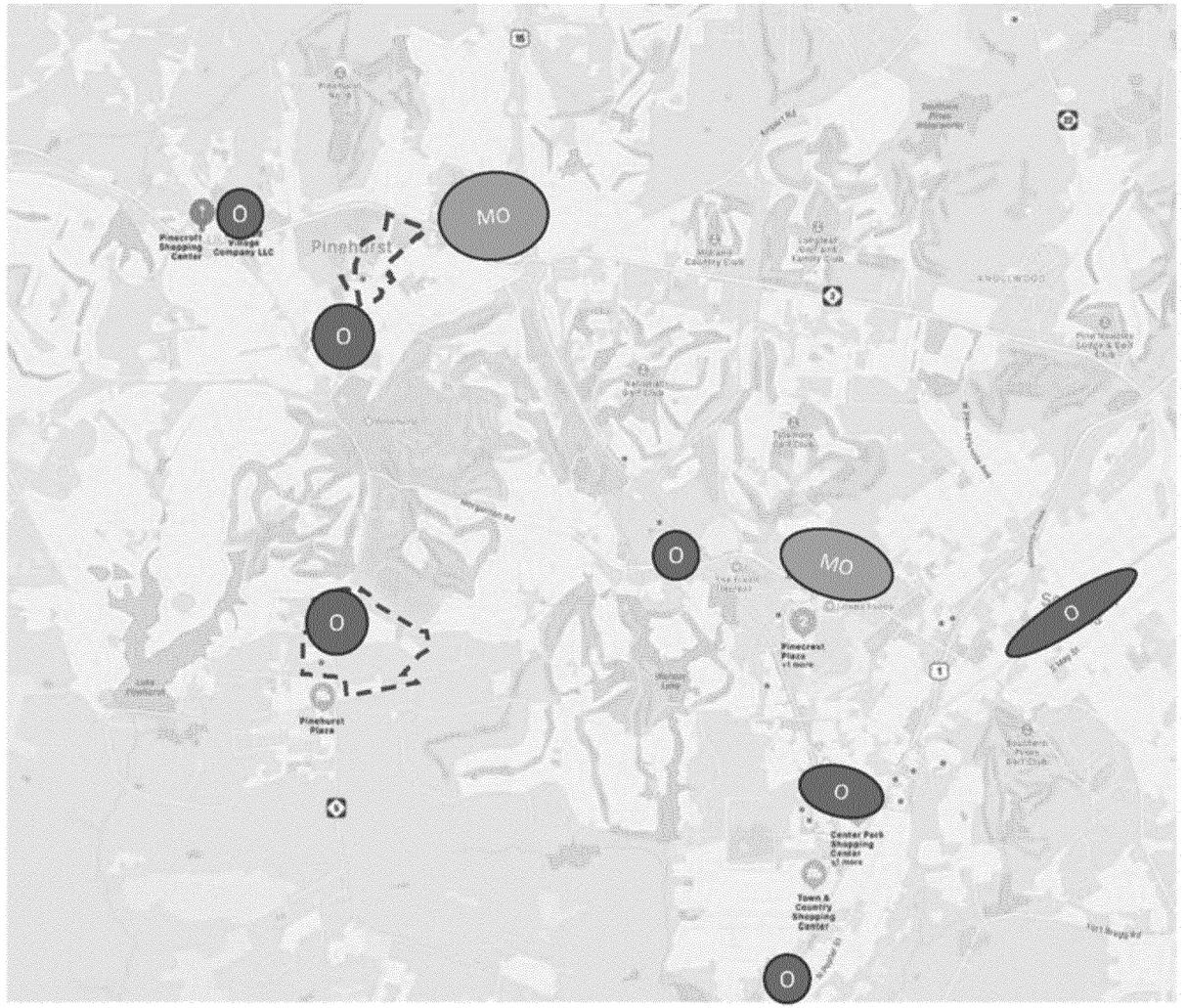
A few retail businesses in PS including the new ABC store, bank, and framing shop

Pinehurst South reasonable location for retail. Main challenge on eastern side of NC 5 is access – retail needs good access, and the rail road crossings make that difficult

Western side of NC 5 would be a good location for locally-serving retail and perhaps shopping center

Pinehurst is projected to see modest retail growth over the coming years; both Village Place and Pinehurst South could capture this growth and help create new, walkable, mixed-use neighborhoods.

Office



KEY

- SMALL AREA PLAN (SAP) BOUNDARY
- O — GENERAL OFFICE
- MO — MEDICAL OFFICE

Occupancy continues to remain high and there has been turnover within buildings

New space has been constructed and slowly leased within the area

Pinehurst office is primarily medical and/or locally serving

Demand is relatively low

Rental rates for most tenants remains below the threshold to build new product

New office product can be built when leases reach $18-$22/SF

This is starting to happen through the Pinehurst area, so new office construction begins to be feasible

There is very little office currently located within Village Place

Location would be appropriate for small-scale office that is locally-serving and generated such as accountants and real estate professionals

Pinehurst South has a fair amount of office

Some of it is medical office, such as dentists, and some is locally-serving such as financial planners

Location would be appropriate for both office mixed in with other uses as well as more stand-alone, larger office given land availability

Pinehurst is projected to see limited office growth over the coming years; both Village Place and Pinehurst South could capture this growth. In VP it would be part of a walkable, mixed-use neighborhoods. In PS it could also be more office-park like space.

Hospitality



KEY

SMALL AREA PLAN (SAP) BOUNDARY

HOTELS

Occupancy is currently down due to Covid-19

After the pandemic, market is likely to fully rebound to previous occupancy levels (65%)

Demand is low to moderate

The Average Daily Rate has remained strong despite Covid-19 at $131 for 2020

RevPAR is down to $61 for 2020, but should return to pre-Covid levels ($90 in 2019)

VP

The Manor is located within Village Place. 42 rooms and recently renovated. Higher-end hotel in the area

Village Place good location for additional hotel rooms. Close to downtown, NC 211, and could appeal to golf, medical, and business travelers

PS

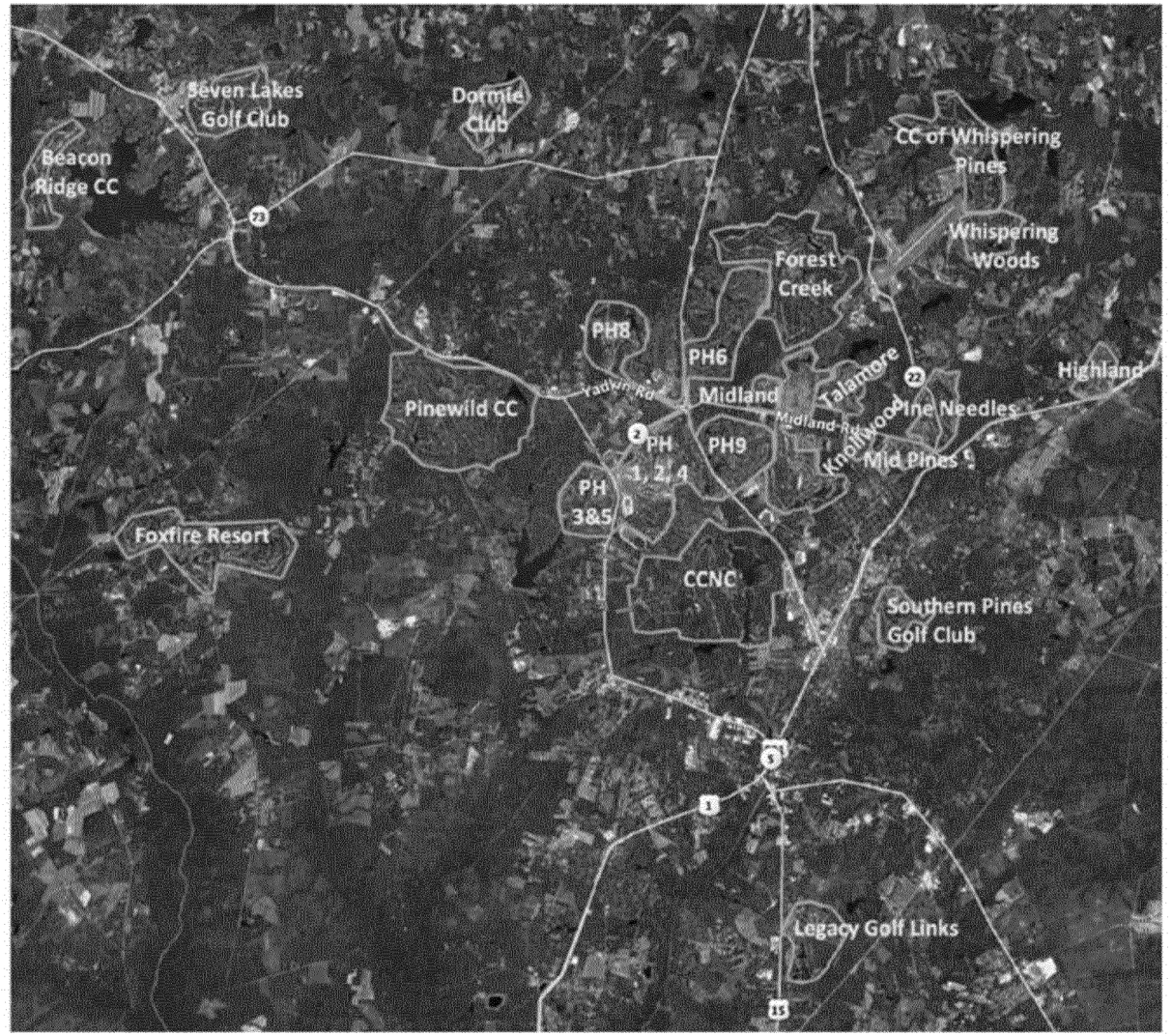
There are no hotels currently in or near Pinehurst South

Majority of hotels in the area are concentrated either close to Pinehurst Center or along the major highways including US 15-501 and US 1

Currently, Village Place would be a more attractive location for a hotel than Pinehurst South

Pinehurst is projected to see modest hospitality growth over the coming years; both Village Place and Pinehurst South could capture this growth and help create new, walkable, mixed-use neighborhoods.

Golf



KEY

SMALL AREA PLAN (SAP) BOUNDARY

GOLF COURSE OUTLINE

Participation is currently up in the US for the first time in many years

Pinehurst has also seen an increase in the amount of golfers and rounds played this year

According to the National Golf Foundation, the average round in the US costs $61 in 2020

Pinehurst has rates far above the national average for golf

VP

Village Place cannot accommodate a new golf course

Given the nature of the other land uses, this is not as good of a location for other golf uses that might be appropriate in Pinehurst South

PS

Pinehurst South cannot accommodate a new golf course

It could be an appropriate location for golf operations facilities

Pinehurst and the surrounding area are projected to see modest golf growth in the coming years; neither Village Place nor Pinehurst South could support a golf course. Pinehurst South could be a viable location of golf-support activities (maintenance, back of house, etc.).

Summary of Market Opportunity

Land Use	Overall Market Opportunity	Village Place	Pinehurst South
For-Sale Residential	✓✓✓✓✓	✓✓✓✓	✓✓✓✓
For-Rent Residential	✓✓✓	✓✓✓	✓✓✓
Retail	✓✓✓✓	✓✓✓	✓✓✓
Office	✓✓	✓✓	✓✓
Hospitality	✓✓✓	✓✓✓	✓✓✓
Golf	✓✓	O	✓

Key: XXXXX = best, X = worst, O = none

Summary of Demand

Land Use	Demand Potential	Locations within Pinehurst
For-Sale Residential	80-120 homes/year	Almost anywhere
For-Rent Residential	15-25 units/year	Major roads, VP, PS, Village Cntr
Retail	20-25,000 SF/ every 5 years	Major roads, VP, PS, Village Cntr
Office	Up to 5,000 SF/year	Medical area, VP, PS, Village Cntr
Hospitality	25 rooms/yr. in Moore Co.	Resort, Village Cntr, PS, VP
Golf	2-3 courses over the next 10 years in Moore Co.	Focus Area 1 is the only area with space

Summary of Demand for Land Uses within Planning Areas

Land Use	Village Place
For-Sale Residential	Unlimited (up to build-out capacity) 1 project would sell approximately 15-25 homes per year
For-Rent Residential	1-2 projects of up to 70-100 units each Timing depends on where else apartments have been constructed (e.g. Village only has demand for 1 project every 5-10 years)
Retail	25,000 - 50,000 SF
Office	25,000 - 20,000 SF Limited amount per year. 5,000 SF total in Village. Village Place could capture some of that, but likely less than Pinehurst South
Hospitality	1 hotel with approximately 75 - 100 rooms as well as bed and breakfasts
Golf	None

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3.0 PUBLIC OUTREACH

3.1 OVERVIEW

3.2 PHASE 1 FEEDBACK SUMMARY

3.3 PHASE 2 FEEDBACK SUMMARY

3.1 OVERVIEW

Public participation helps ensure the plan addresses community concerns and ideas, foster an inclusive and transparent planning process, identify key opportunities and priority areas, and build momentum to move a planning process towards adoption and implementation. Stakeholder input and feedback were critical to creating a community-supported vision for Village Place.

A critical task throughout the planning effort was to gather stakeholder input on existing conditions and feedback on proposed concepts. This engagement was conducted through a variety of outreach methods.

Stakeholder Interviews

Throughout December 2020 and January 2021, the consultant team conducted over 20 key stakeholder interviews, discussing the two plan areas with Village staff, appointed and/or elected officials, agency representatives, committee chairs, residents, local businesses and merchants, golf and tourist industry representatives, major employers, property owners, developers, brokers, and others to further understand their viewpoints.

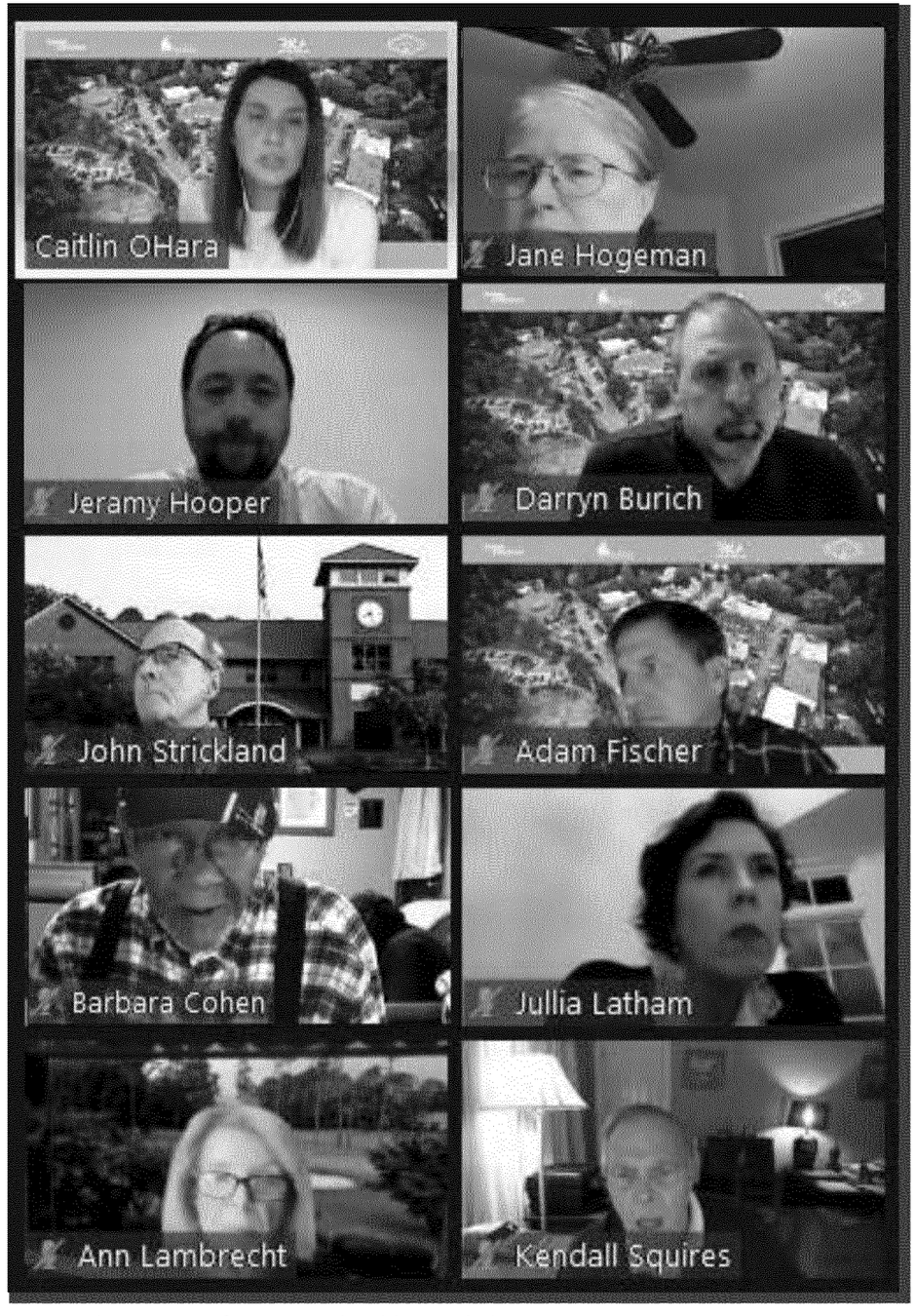
Public Workshops

The consultant team and the Village of Pinehurst held three public workshops to elicit feedback and present work to stakeholders. The workshops were held as follows:

- In February 2021, Public Workshop 1 was held to outline a vision for the future of the two Small Area Plans with public input and guidance. There were 148 registrants (including consultant and Village staff team members), and approximately 100 attendees participated virtually, due to COVID-19 precautions.
- In early June 2021, Public Workshop 2 was held to solicit further feedback on the proposed concepts for the two Small Area Plans. There were 88 registrants (including consultant and Village staff team members) and approximately 59 attendees participated virtually, due to COVID-19 precautions.
- In February 2022, Public Workshop 3 was held to present the draft Village Place Report. There were XX registrants (including consultant and Village staff team members) and approximately XX attendees participated in person at the Fair Barn.



Presentation images from Public Workshop 1



Screenshot images from Virtual Public Workshop 1

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3.2 PUBLIC WORKSHOP 1

Overview

In February 2021, the consultant team and Village of Pinehurst held Public Workshop 1 (of 3) to outline a vision for the future of the two Small Area Plans with public input and guidance.

The Public Workshop was held virtually due to COVID-19. There were 148 registrants (including consultant and Village staff team members), and approximately 100 attendees participated. Darryn Burich (VOP) introduced the team and gave an overview of the project goals and objectives. Cecily Bedwell and Caitlin O'Hara (DCI) presented the project team, project introduction, project schedule and Existing Conditions. Melina Duggal (DREA) presented the Market and Economic Analysis.

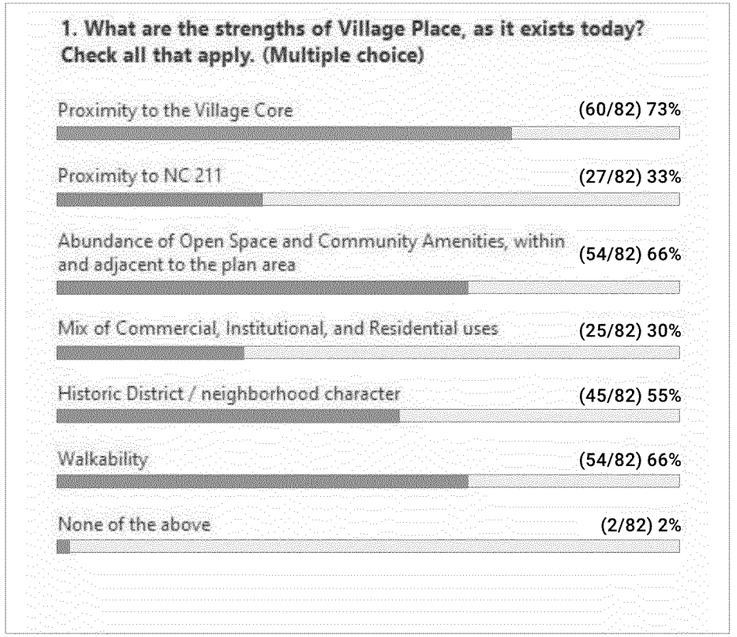
Breakout Rooms were utilized to give participants the opportunity to ask questions, give input, and listen to other stakeholders. Each breakout room was facilitated by a member of the project team. Additionally, the project website provided outreach materials as well as an online survey and a summary of the presentation.

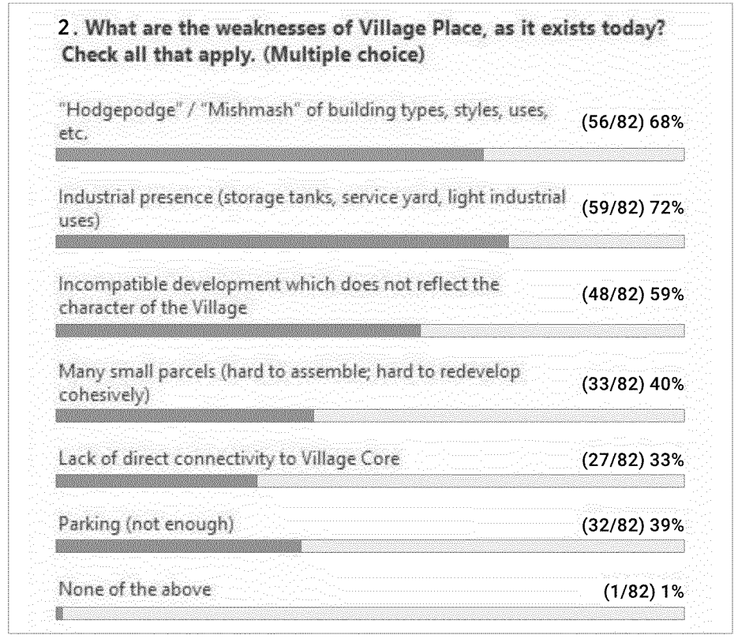
The following pages summarize the feedback received as a result of Public Workshop 1.

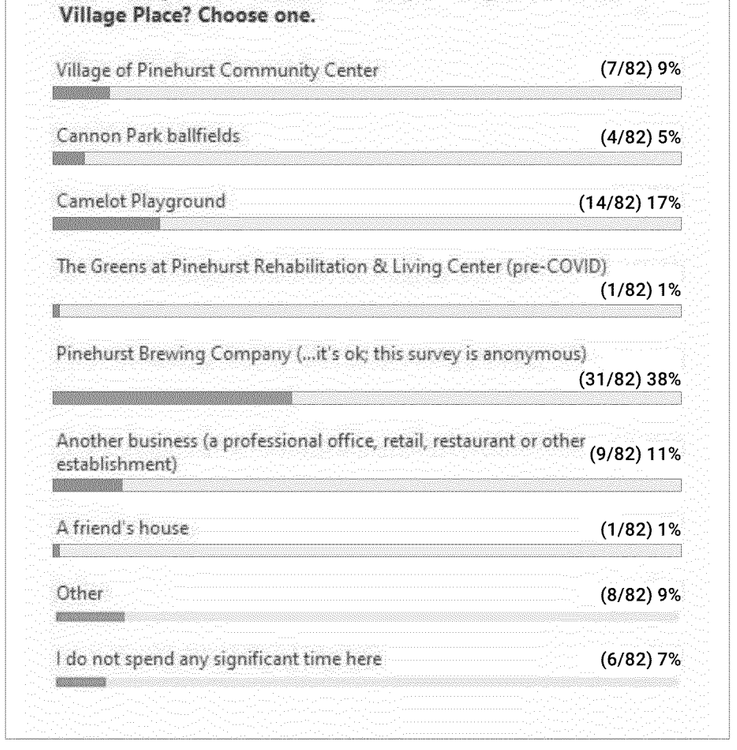
Village Place Polling Questions

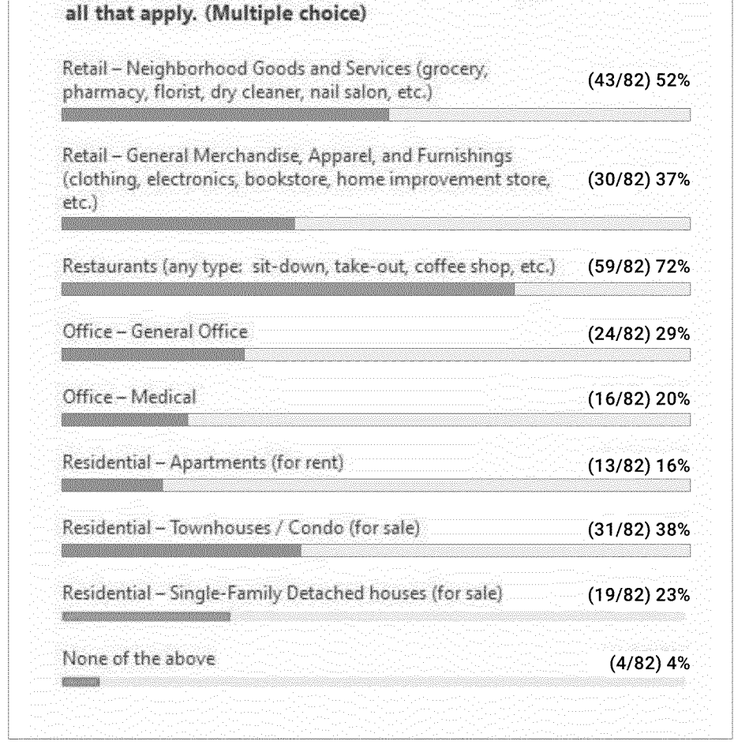
The Public Workshop included two rounds of Polling Questions, one for Village Place and one for Pinehurst South. The polls were available live during the Public Workshop and also on the Project website for 10 days following the event. Participants were encouraged to use the polling questions to express their views on the strengths, weaknesses, and opportunities relating to each Small Area Plan.

This page shows the cumulative results of the Polling Questions for Village Place.



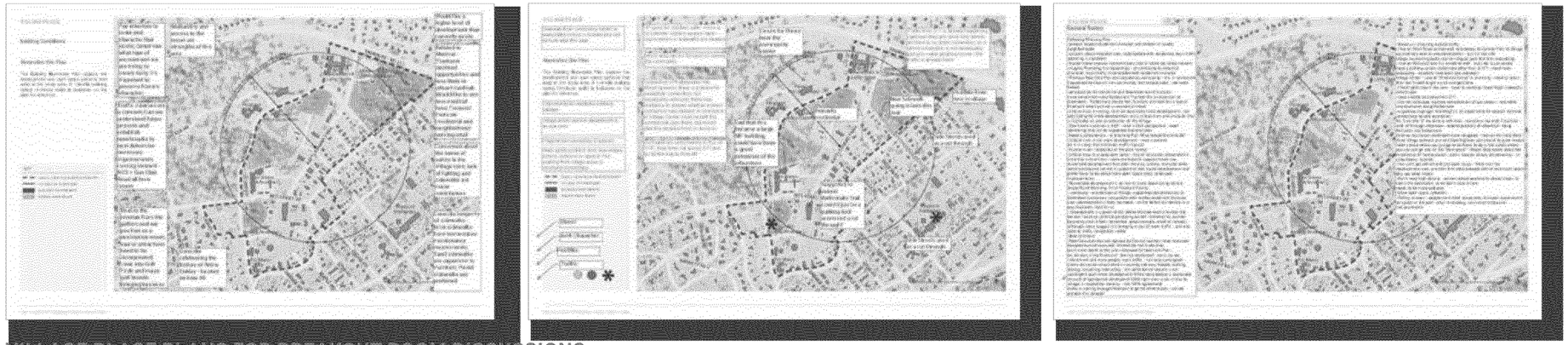






Public Workshop 1 Summary

Public Workshop 1 offered the community an opportunity to voice their observations and concerns about the future of Village Place and Pinehurst South. The list below is a compilation of the comments received during the workshop, as well as additional comments received by staff post workshop, for Village Place. For a full list of comments recorded during Public Workshop 1, please visit the project website: www.engage.vopnc.org/smallareaplans.



VILLAGE PLACE PLANS FOR BREAKOUT ROOM DISCUSSIONS

The pages above are examples plans shown during the Breakout Rooms for Village Place. For a full reference of these comments, please see the PW 1 Summary document on the project website.

Land Use

- Village Place lacks a sense of place and is currently a hodgepodge of uses
- Pinehurst is established as a destination resort for golfers, therefore, the needs and desires of visitors should be taken into account as it is a major source of revenue for businesses. Consider amenities or retail options that support these users – i.e., golf related retail
- Desires:
  - A library to be located in this area, potentially across from Village Hall as a 2-story building
  - Uses that serve the community; i.e. personal services, neighborhood serving retail, open space, library
  - Live/work or other creative solutions for residential. However, some stakeholders are concerned that apartments above retail currently do not work well in VC (most likely due to parking)
  - Multi-family or townhouses (mixed opinions from stakeholders)
  - There are mixed opinions about restaurants in this area. Some stakeholders feel they are needed, as there is nowhere to go right now, however there is concern for character, competition with VC and more traffic
  - Village Place would be a good opportunity for retail space if not in competition with VC
  - The uses in this area should complement VC, be an extension of it, and serve the community, not compete with VC
- Concerns:
  - Apartments may attract residents who are not invested in the community
  - Concern about industrial uses – safety for children, truck traffic
  - The Public Service area is an eyesore, this area would be better as mixed-use for the public

Character

- Village Place lacks an overall plan
- Architecture:
  - Concern for existing uses that do not match the character of VOP; overall the entire area needs better architectural character.
  - Architectural character should blend in with the Village, more traditional
  - Desire for adaptive reuse, not for new construction or cheap construction.
  - Maintain scale and character of older single family detached homes; preserve historic character
  - "New England Small Town"
- Landscaping and open space are very important to the character of Pinehurst
- Concern for protecting existing trees
- Some stakeholders believe this area should have no more rental units and no new construction over 2 stories

Transportation

- Need for an independent, professional traffic study
- Overall need for improvement in pedestrian circulation in this area. Pedestrians currently walk, but it is not safe. If it were safer, more people (families) would walk between destinations as opposed to drive
  - Connecting to the schools
  - Connecting various open spaces
  - Connecting to VC (residents already bike/walk from here to VC)
  - Paths along Rattlesnake Trail, especially the west side
  - Consider a bike-share program
- Considerations for paths:
  - Consider longevity of sidewalks – brick sidewalks and sand sidewalks require a lot of maintenance - mixed opinions about desired sidewalk material
  - Maintain clay paths where it makes sense in the historic district
  - Consider visual interest along pathways – i.e., buildings that are visually interesting, buildings lining the street
  - Need crosswalks along Rattlesnake, not just at NC-211
  - Consider use by golf carts
  - Desire for a singular path that links everything together
  - Leverage public/private partnerships to improve sidewalks/trail connectivity
- Traffic is an overall concern in the area; streets are stressed, current infrastructure will not support increase in traffic
  - Pinehurst Brewery is attracting outside traffic. Some stakeholders find this traffic concerning
  - Cut through traffic on the side streets -- i.e. Woods Road, Fields Road to get to the Village Core
- Rattlesnake Trail
  - There needs to be a better gateway from NC-211 – although some stakeholders think the opposite, do not want to entice visitors
  - This street should feel like a Pinehurst street, not a commercial street, i.e., improve landscape and streetscape to be consistent with streets in VC
  - Mixed opinions about a cut-through for Rattlesnake Trail – a pedestrian connection would be beneficial, not sure about vehicular
  - Rattlesnake could be a better entrance, a big connector to the hospital as well
- Parking is a major concern:
  - If there is more development, will need even more parking
  - Parking needs to be convenient and safe
  - Need parking south of McCaskill to support the Brewery, Manor Inn, and Village Center parking needs
  - No parallel parking on residential streets; walking paths on every street
  - Opportunity in this area for an aesthetically-pleasing parking garage
- Concern that widening streets will displace existing trees
- Extension of Kelly Road could be a good idea if "cleaned up" and leading to a destination

3.3 PUBLIC WORKSHOP 2

Overview

In Phase 2, from March to May 2021, based on the analysis conducted and feedback received during Phase 1, the consultant team designed and compiled Concept Plan Options, Street Sections, Open Space and Street Network Plan Diagrams, Renderings, Precedent Images, and similar for Village Place and Pinehurst South. During this time frame, the consultant team discussed the two plan areas and concepts with Village staff, appointed and/or elected officials, and key stakeholders and, based on input received, refined the concepts.

In early June 2021, the consultant team and Village of Pinehurst held Public Workshop 2 (of 3) to solicit further feedback on the proposed concepts for the two Small Area Plans. There were 88 registrants (including consultant and Village staff team members) and approximately 59 attendees participated virtually, due to COVID-19 precautions. Cecily Bedwell and MacKenzie Twardus (DCI) presented the Project Overview, Public Workshop 1 Summary, two plan options for each Small Area Plan, and other supporting materials. Melina Duggal (DREA) presented the Market and Economic Analysis summary that contributed to the plan options.

Breakout Rooms were utilized to give participants the opportunity to ask questions, give input, and listen to other stakeholders. Each breakout room was facilitated by a member of the project team. Materials were then posted to the project website to allow for further input.

The following pages summarize the feedback received during Public Workshop 2.



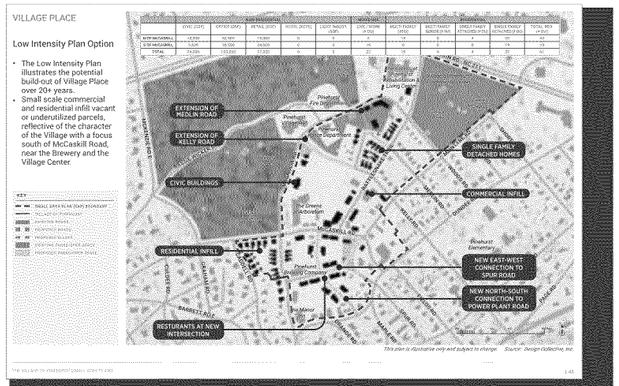
Presentation images from Public Workshop 2

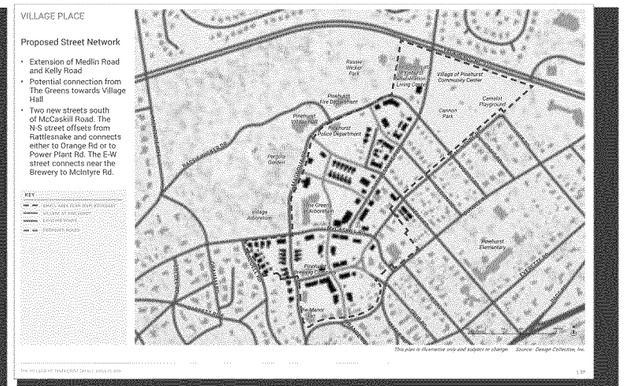


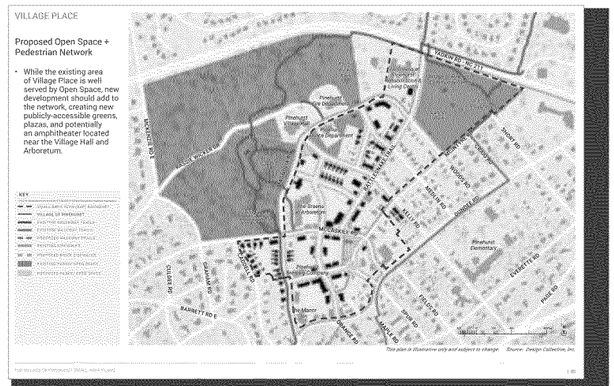
Screenshot images from Virtual Public Workshop 2

Public Workshop 2 Summary

Public Workshop 2 offered the community an opportunity to voice their observations and concerns about the future of Village Place and Pinehurst South. The list below is a compilation of the comments received during the workshop for Village Place, as well as additional comments received post workshop, via the project website survey (see www.engage.vopnc.org/smallareaplans for more information).







VILLAGE PLACE PLANS FOR BREAKOUT ROOM DISCUSSIONS

The pages above are examples plans shown during the Breakout Rooms for Village Place. For a full reference of these comments, please see the PW 2 Summary document on the project website.

Low and High Intensity Plan Options

» Positive feedback from the stakeholders overall. PW1 comments were taken into account.

» Some stakeholders think the Low Intensity Plan is better; they prefer Single-Family Detached (SFD) to blend in with the character of the Village.

» Other stakeholders would like to see some Multi-Family units (either rental or for-sale) incorporated, as there is a lack of diversity and residential options in the area. Some stakeholders note that both young and senior residents may prefer Multi-Family units, to be close to activities, instead of having a backyard

» There is concern that the High Intensity Plan would bring an influx of cars, adding to the existing traffic issues.

- The support for Mixed-Use buildings is divided. Some stakeholders support Mixed -Use, if buildings are setback with landscape/shops.
- Other stakeholders think Mixed-Use is too urban and does not fit with VOP character.

» Stakeholders support the idea of grouping restaurants and retail near the Brewery, as the Brewery is a magnet. However, there is concern that parking in the area might become a problem.

» The idea of a parking garage behind the hotel building, and parallel parking in commercial area, is supported by some, as it encourages people to walk around the Village Core.

» A few stakeholders suggested an off-hill garage, as the topography of area can support the design.

» There is an important need for an increased of activities and destinations in VOP.

» Desire for a Form-Based Code (FBC) that guides the right type, scale, look of buildings.

Connections/Street Network

» Sidewalks:

- Overall support for new sidewalks and pedestrians connections.
- Streetscape improvement can encourage visitors of Pinehurst to explore area by foot and bicycle. A connection to the Arboretum, and other destinations, is a great way to encourage visitors of Village Core to visit businesses in this area.
- Although a few stakeholders are concerned about sidewalks being too wide, many are in support of wide sidewalks to accommodate outdoor dinning/pedestrian access.
- Stakeholders are concerned about the topography of the area, and how ADA accessible it will be.

» Streets

- Many stakeholders support connection to Orange Road as it is a more direct connection to the Village Core. Other stakeholders are concerned about ownership of streets and how likely is that private owners would allow streets to be built.
- Some stakeholders do not support connection to Orange Road and, instead, prefer a connection to Power Plant Road.
- Some support offsetting Rattlesnake Road as more appropriate.
- A few stakeholders do not support the idea of extending Medlin Road
- Additional streets make for more parallel parking.
- Concern streets are out of scale. All streets should be similar in scale. Street and sidewalks near Brewery seem too wide
- NC-211 can be used to handle traffic load.
- Curving streets are unique to character of Pinehurst - accommodating growth that has to happen, while maintaining character of the community
- Streets need to maintain the Olmstedian experience - consistent with the existing character - while supporting growth gracefully
- Some stakeholders are concerned that cut through traffic negatively impacts existing residential areas.
- Need for an independent, professional traffic study

Buildings:

» 2 stories is a better height; consistent with surrounding context.

» Some stakeholders believe the hotel and parking garage (shown at 3 stories) do not belong / are out of context

» Some stakeholders support 3-story buildings if in the right location – i.e., next to The Greens, an existing, taller structure within this neighborhood, or next to the Open Space/Retail Core; most are in support of 3 stories in an off-hill condition

» 3-Story buildings should have a landscape setback to avoid "claustrophobic"/out of place feeling. (e.g., The Manor Inn)

» A few stakeholders suggested 2 stories in front, 3 behind, with a garage in the rear, taking advantage of topography.

» Some believe 3-story buildings should not be in the core area, rather should be near other tall buildings.

» The commercial core should have an appropriate scale and character.

» New development should encourage night life activities, though not supported by all.

» Landscape and buildings must integrate to match VOP theme and make it more desirable.

» Parking for new residential in back is a problem for houses that may need backyards. Kids forced to play in street. (If large lot, garage in rear off alley, and there is still room for a big backyard, that would be ok)

» 3 stories with an active ground-floor use is important (coffee shop, mom + pop etc.); it is important to interact with the building's first floor if walking by (welcoming passersby, instead of imposing)

Open Space:

» Overall, community is very supportive of the Amphitheater. Topography and location is good, but some suggested that it could be bigger

- Landscape should be natural (organic)
- Some believe existing (Pine) trees should be replaced/re-purposed

» Some think that there should be more Open Space (parks) with organic landscape.

» Some stakeholders would like the library to be located on Village-owned land, and some specifically on the west side of Rattlesnake, on the 1-acre, flat property owned by the Village.

» Residents are pleased with the triangular greens.

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4.0 RECOMMENDATIONS

4.1 OVERVIEW

4.2 GUIDING PRINCIPLES

4.3 CONCEPT DESIGN

4.4 FINAL DESIGN

The recommendations for Village Place are broken down into three components: Guiding Principles, Concept Design, and Final Design. The material in this section takes into consideration the Phase 1 existing conditions analysis; the review of previous plans and studies; stakeholder feedback on proposed concept plans received in Phase 2; and continued input on refinements to the preferred plan and recommendations throughout Phase 3.

Approach

The approach for developing concept plan options in Phase 2 was guided by the following summary of feedback received in Phase 1, assembled in to three main planning categories of Character, Land Use, and Transportation. Additionally, the planning concepts were guided by universal planning principles as well as the used by Olmsted and Manning in the original design for Pinehurst.

CHARACTER:

- Mixed-use and walkable
- Reflective of Village Center (VC); the area south of McCaskill Road, in particular, should emulate VC in scale, massing, and materials
- Protect, respect, and connect to - but do not compete with/drain - VC
- Address the character of Village Place described by stakeholders as “blighted” and "haphazard"
- Test preferences for 1-2 or 1-3 stories

LAND USE:

- McCaskill south: Mixed-Use similar in scale to VC; focus Restaurants and Retail here, with some office
- New infill development requires the relocation of the Village's Public Services Complex
- Address Parking (surface and potentially structured)
- McCaskill north: Mixed-Use along Rattlesnake Trail; explore variety of Residential types (including cottages, townhouses, live-work, and missing middle residential) and infill Commercial (mainly Office)
- Incorporate new small Open Spaces, to supplement and connect to existing larger Open Spaces which are well-supplied

TRANSPORTATION:

- Interest in connecting area north of McCaskill to VC, but likely not a direct vehicular connection
- Explore crossing streets through McCaskill south area, connecting to Power Plant Road, Spur Road, and/or McIntyre Road
- Explore street extensions of Medlin Road, Kelly Road, etc. west of Rattlesnake Trail
- Study streetscape improvements along Rattlesnake Trail, including giving feedback on the in-progress VOP Rattlesnake/Woods Sidewalk Plans
- Connect trails and destinations
- Choose sidewalk locations with consideration of existing Single-Family frontage

Guiding Principles

The Guiding Principles below informed the Concept and Final Designs found within this document and should carry through in future development and improvements within Village Place. These defining planning principles help creating lively, walkable, desirable, and cohesive neighborhoods. The Guiding Principles employed for this planning effort are separated into universal Planning Principles and specific Olmsted and Manning Principles as follows.

PLANNING PRINCIPLES:

- Create a connected circulation network
- Incorporate Complete Streets
- Strengthen building frontage
- Provide a variety of public open spaces
- Design streets for flexible programming
- Promote health and wellness through neighborhood design

OLMSTED & MANNING PRINCIPLES:

- Design curvilinear street forms, following topography and continuously redirecting views
- Incorporate triangular parks at curvilinear street intersections
- Create an organic grid with short, walkable blocks (no cul-de-sacs)
- Maintain consistent building setbacks (except for Civic uses)
- Encourage tree-lined streets
- Organic landscape design in Open Spaces

Concept Design

Following the Public Outreach engagement and the Guiding Principles research, the consultant team began a concept design process to explore options for development in Village Place. The purpose of this phase (Phase 2) was to explore options for the Village Place Small Area Plan and elicit feedback from Village staff and representatives as well as stakeholders. The Concept Design was presented as part of Public Workshop 2. The feedback on these designs was critical to generating the Final Design, which can be found in Section 4.4 of this document.

Final Design

The Final Design (i.e., the preferred design solution) is a combination of text, perspective renderings, framework plans, streetscapes, and a potential build-out plan and absorption plan that represent the culmination of the feedback received through the project's Public Outreach process as well as the insight achieved from the existing conditions analysis, best practice and precedent research, and the concept design studies. The Final Design includes recommendations for planning and transportation elements throughout Village Place. The Final Plan and its accompanying recommendations encompass the entire plan area and consider its surroundings and broader context. The Final Design helps to create an interconnected and coordinated approach for recommendations and inform the design the Detail Plan.



Village Center streetscape depicting the curving streets and irregular groupings of evergreen and deciduous planting that are the hallmark of the original Olmsted & Manning vision for Pinehurst
Source: Design Collective

Form-Based Code (FBC)

The Form-Based Code (FBC) is a companion document to this Small Area Plan (SAP) report. While this document focuses on the existing conditions analysis, best practice and precedent research, Concept Design studies, the Final Design plan and recommendations, as well as stakeholder feedback, it should be seen as an account of the planning process and the intent and vision established collectively. The FBC, on the other hand, is a regulating document, taking the intent and vision established through this planning process and formulating precise development standards that help ensure the vision becomes reality. Property owners, whether from the public or private sector, and their design teams will be required to follow the criteria laid out in the FBC when designing and submitting their intended development or improvement. The Village will use the FBC to review submissions, to ensure they are in compliance.

Planning Principles

The universal Guiding Principles below identify overarching design strategies for achieving an engaging, successful, and sustainable built environment. Additionally, on the following pages, the Olmsted and Manning Principles are design strategies specific to the historic design of the Village of Pinehurst which should be preserved and emulated in Village Place. These principles have been identified as essential strategies for improving Village Place and should be used to guide zoning modifications, streetscape and transportation improvements, and new development throughout the area.

1. CREATE A CONNECTED CIRCULATION NETWORK

» Provides greater accessibility through more direct routes, compared to a branching system

» Increases overall network efficiency and reliability through added redundancy

» Improves multi-modal transportation and encourages walking and bicycling

» Improves safety and public health

» Improve and expand golf cart accessibility

2. INCORPORATE COMPLETE STREETS STRATEGIES

» Incorporate bicycle and pedestrian facilities (e.g., accessible, passable sidewalks; curb ramps; bike racks; dark sky compliant, LED lighting; etc.)

» Integrate innovative stormwater management

» Improve the existing streetscapes to promote safe, comfortable, and convenient access for all users

» Require new development to design and improve streets to meet the Complete Streets principles and enhance and expand the pedestrian, bicycle, golf cart, and vehicular networks

3. STRENGTHEN BUILDING FRONTAGE

» Define Frontage with Street Trees and Buildings

» Relegate parking to side or rear

» Encourage infill development that respects traditional frontage patterns, with buildings lining streets

» Locate building entrances along primary streets and provide easy access and wayfinding for all users

» Require new development in the core area to have buildings with active ground-floor uses along primary streets to create engaging streetscapes

4. PROVIDE A VARIETY OF PUBLIC OPEN SPACES

» Incorporate a variety of passive and active open spaces to serve a broad base of users

» Promote an active lifestyle at all stages, by providing family-friendly outdoor activities and integrated accessible features and facilities

» Distribute open spaces to encourage daily use and access by walking and bicycling

» Require new development to provide a variety of appropriately-scaled open spaces and provide connections to the trail network. For proper village-scaled development, open space should equate to approximately 8% of the developable land area.

5. DESIGN STREETS FOR FLEXIBLE PROGRAMMING

» Streets in core locations should be flexible and adaptable

» Able to carry pedestrians, bicycles, and vehicles on the typical day

» But on event days, or in unique circumstances like the pandemic, be able to close to vehicular traffic to host festivals, in-street dining, provide additional open space, etc.

» Explore parking ratio reductions

6. PROMOTE HEALTH AND WELLNESS THROUGH NEIGHBORHOOD DESIGN

» Connect people with health, fitness, and wellness through daily engagement and activity

» Create places to Live-Work-Play-Eat-Shop in an enriched natural setting that promotes healthy lifestyles

» Promote walkable, mixed-use neighborhoods, lessening dependence on vehicles

» Celebrate Pinehurst's founding as a health resort village



1. CREATE A CONNECTED NETWORK



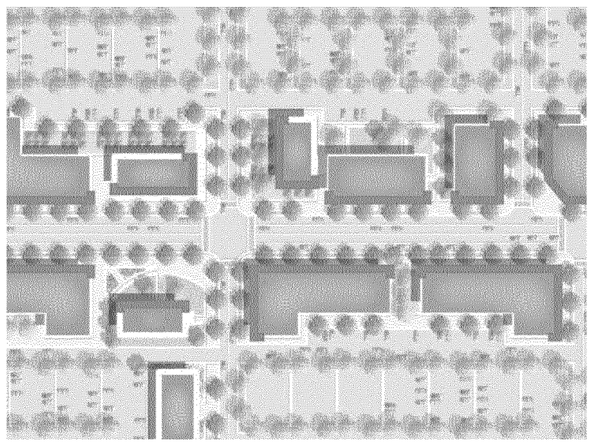
4. PROVIDE A VARIETY OF PUBLIC OPEN SPACES



2. INCORPORATE COMPLETE STREETS STRATEGIES



5. DESIGN STREETS FOR FLEXIBLE PROGRAMMING



3. STRENGTHEN BUILDING FRONTAGE

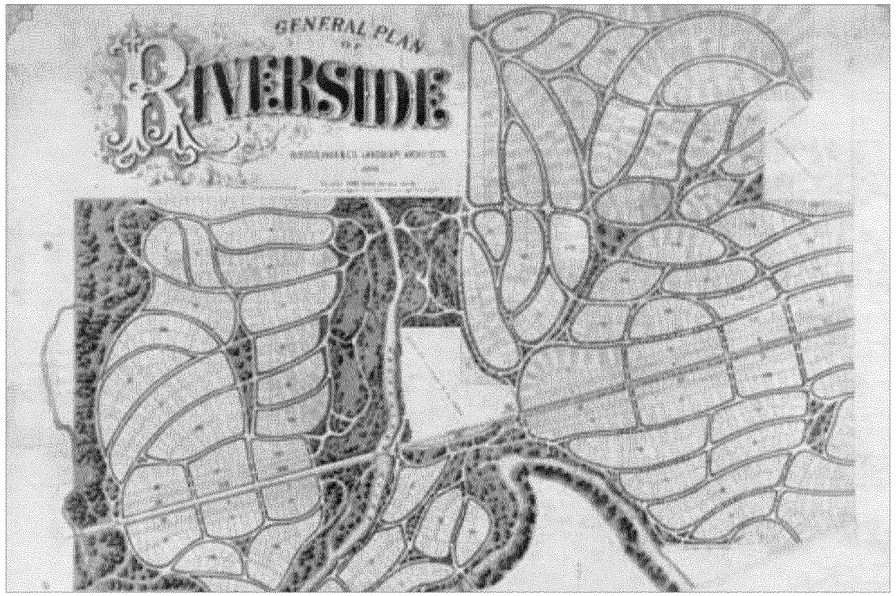


6. PROMOTE HEALTH AND WELLNESS ENVIRONMENTS

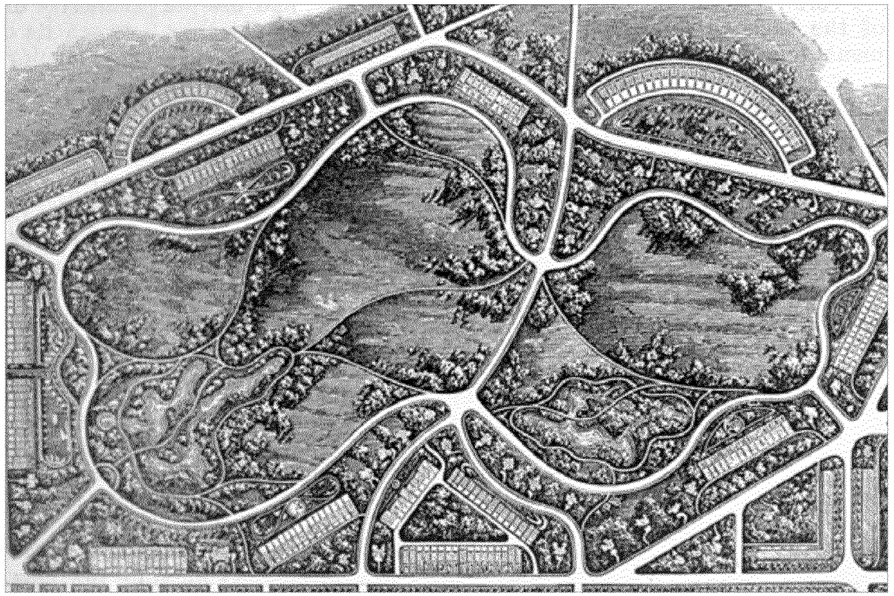
Olmsted Planning Principles

In 1895, James Walker Tufts hired the landscape architecture firm Olmsted, Olmsted, and Eliot to design the Village of Pinehurst as a health-centered resort. Known as the "Founder of American Landscape Architecture", Frederick Law Olmsted brought his design philosophy and planning principles to bear on Pinehurst - an approach that can be seen in many of his designs for towns, cities, and parks. These "Olmstedian" Principles include the following design strategies:

- Design curvilinear street forms, following topography and continuously redirecting views
- Incorporate triangular parks at curvilinear street intersections
- Create an organic grid with short, walkable blocks (no cul-de-sacs)
- Maintain consistent building setbacks (except for Civic uses)
- Encourage tree-lined streets, typically with regularly-spaced shade trees
- Organic landscape design in Open Spaces



Olmsted Plan: Riverside, IL
Credit: Enjoy Illinois



Olmsted Plan: Birkenhead Park - United Kingdom
Credit: The American Cyclopedia v. 13, 1879



Olmsted Plan: Vandergrift - Westmoreland Co, PA
Credit: Alamy Stock Photo



Olmsted Plan: Sherwood - Richmond, VA
Credit: National Park Service/Sherwood Land Co.

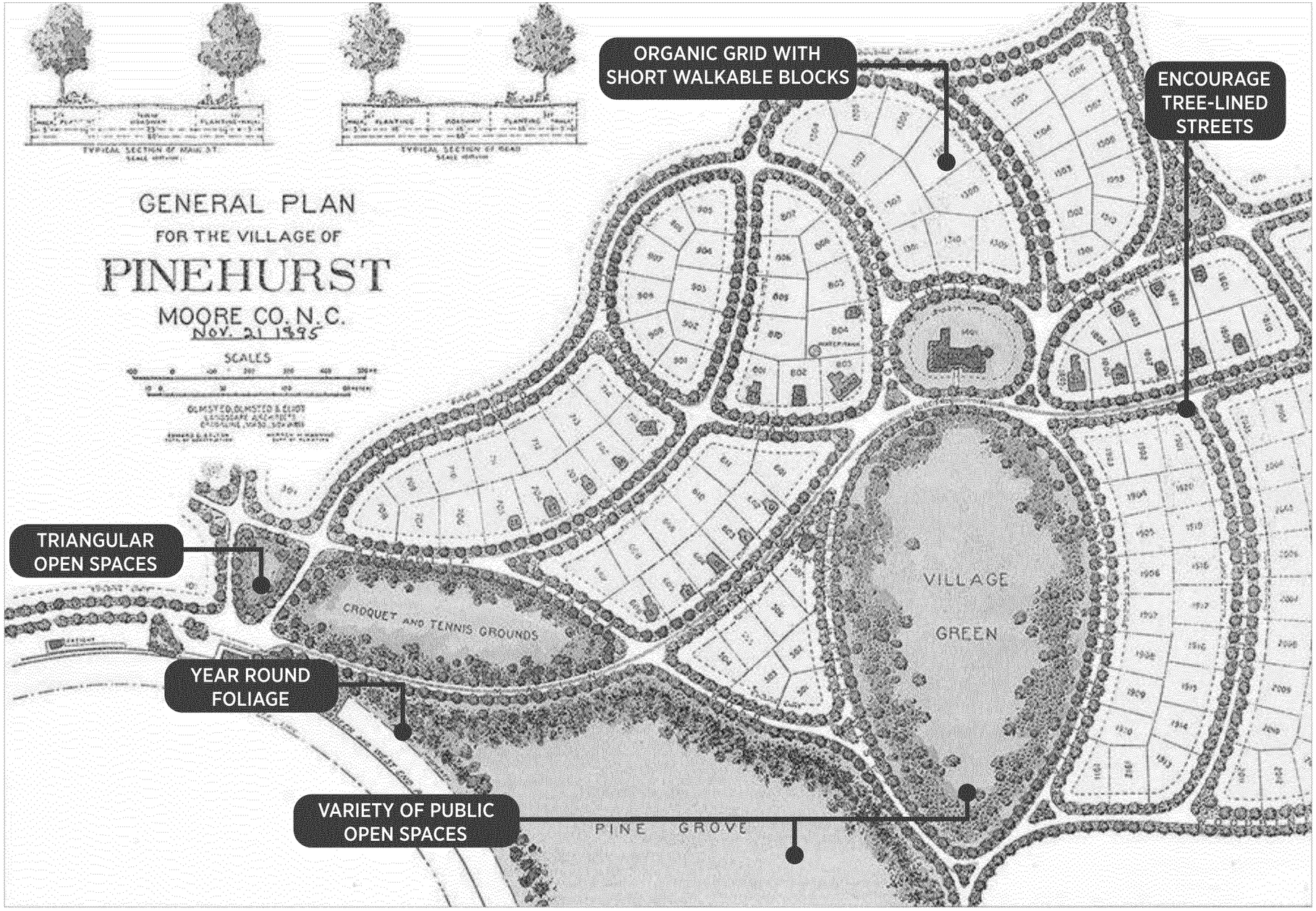
Olmsted and Manning Principles and the Village

The General Plan for the Village of Pinehurst, shown to the right, exhibits many of the iconic "Olmstedian" characteristics of design. However, Olmsted's assistant Warren H. Manning also uniquely influenced the vision and execution of the plan, carrying out most of the major landscape design work and implementation. To view more detail, see the *Pinehurst National Historic Landmark Nomination Registration Form*.

- Design curvilinear street forms, providing a more relaxed approach to "getting there"
- Create an effect of a park-like oasis
- Encourage the use of native plants, primarily evergreens and plants with winter interest, to create a year-round green village. To note, while the plan to the right depicts a regular, linear spacing of deciduous street trees, the built landscape of Village Center represents an organic approach with irregular groupings of odd-numbered, mixed evergreen and deciduous plantings along the street edge)
- Accommodate new patrons and winter residents by providing additional recreational venues (this later became a focus on the golf industry with designer Donald James Ross)



Village Center
Credit: Village of Pinehurst

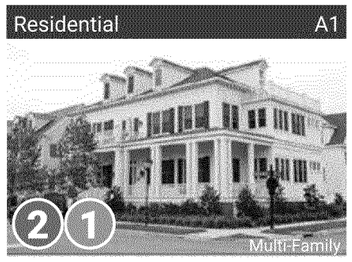


Overview

Following the Public Outreach and Guiding Principles research, the consultant team led a Concept Design process to explore options for development in Village Place. The purpose of the Concept Design phase (Phase 2) was to explore options for the Village Place Small Area Plan and elicit feedback from stakeholders and continued input from Village staff and representatives. The following pages outline images, diagrams, and plan options that were developed and presented as a part of Public Workshop 2. The feedback on these concept designs and images was critical to generating the Final Design, which can be found in Section 4.4 of this document.

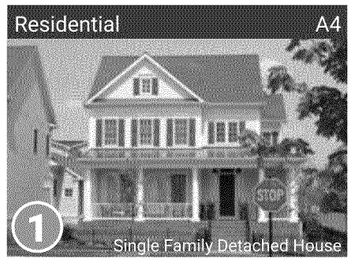
The images to the right show stakeholder preference feedback received in Public Workshop 2 Breakout Room Discussions. The images were shown as precedents for the architecture, streetscapes, parking, and parks/open spaces of Village Place. Participants were encouraged to respond "like" (with green dots) or "dislike" (with red dots) to each photo; the numbers within the green and red dots indicate the number of stakeholder responses.

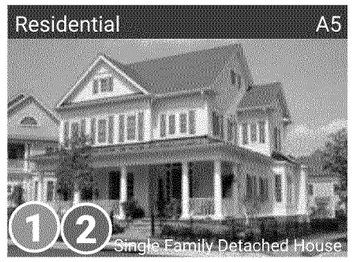
ARCHITECTURE

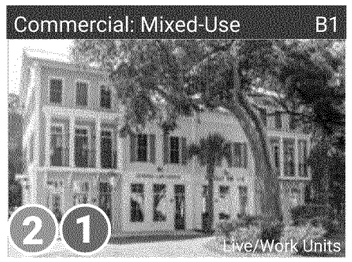














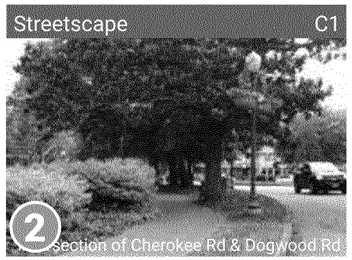






ARCHITECTURE

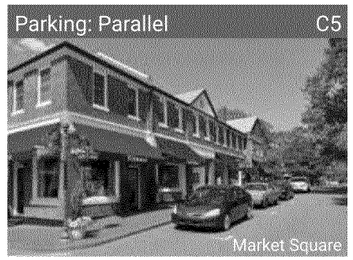
STREETSCAPE/ PARKING











PARKS/ OPEN SPACE











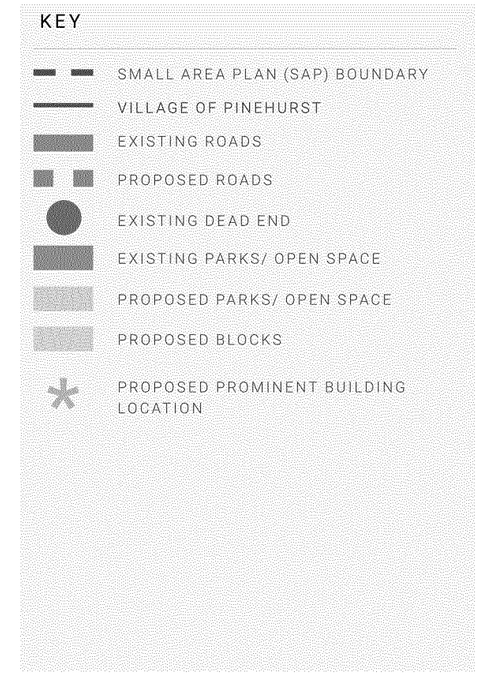
PUBLIC INPUT RECEIVED BASED ON BREAKOUT ROOM DISCUSSIONS

The feedback above is a summary of all Breakout Rooms. Participants were encouraged to respond to "like" (green) or "dislike" (red) for each photo.

Parti/Block Diagram

The Parti/Block Diagram was presented as part of Public Workshop 2. The purpose of this plan was to elicit feedback and conversation about development patterns and circulation in Village Place. This plan should be considered a preliminary concept study and not the final recommended plan. To see the Final Plan (i.e., the preferred design solution), please see Section 4.4 of this document.

- The Parti/Block diagram illustrates the Approach in plan form
- The diagram shows the proposed addition of new streets, forming new blocks and creating a more connected street network



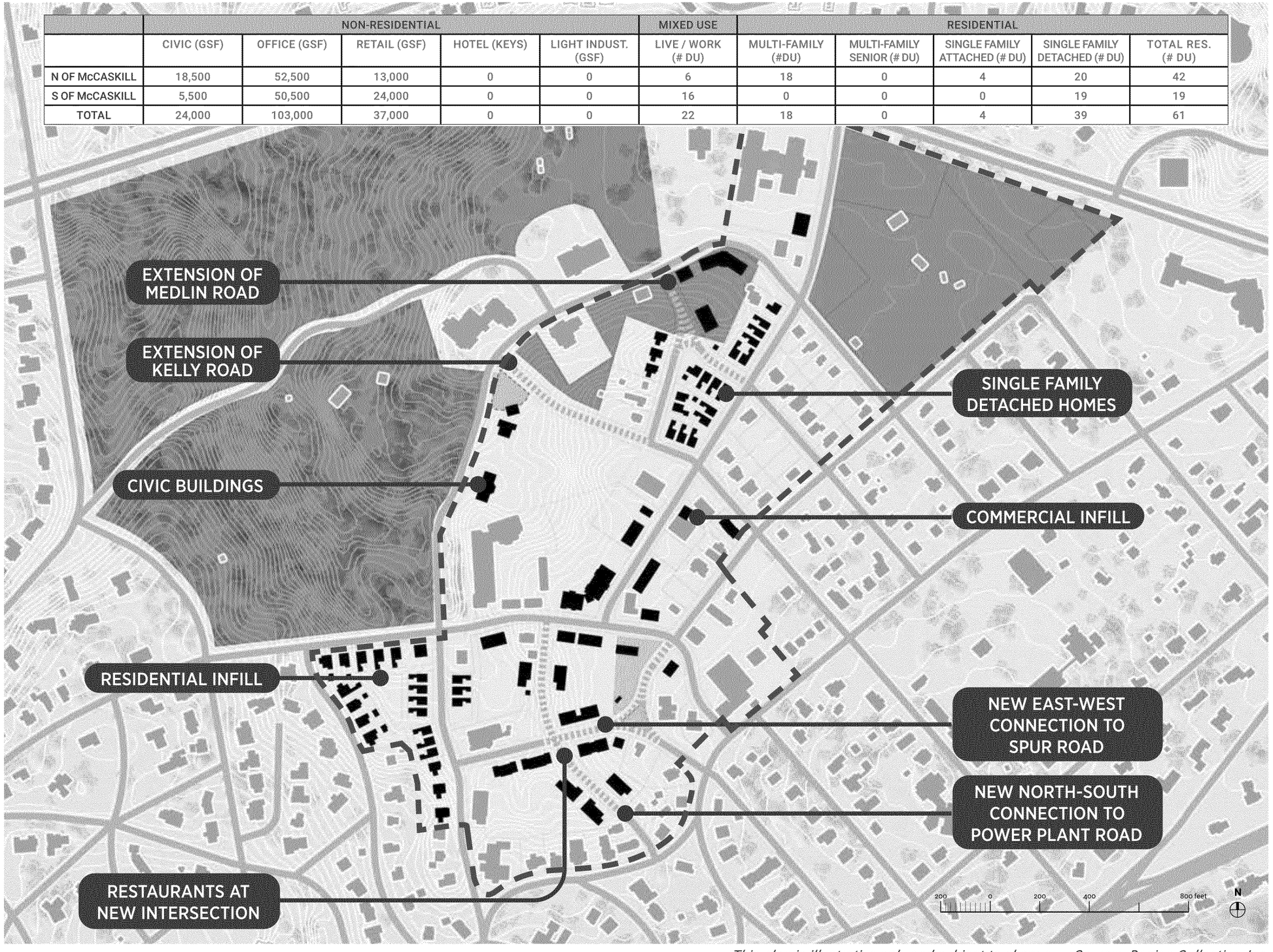


Concept Design
Low Intensity Plan Option

The Low Intensity Plan Option was presented as part of Public Workshop 2. The purpose of this plan was to test opportunity sites; see what building and parking configurations might fit on parcels; and elicit feedback and conversation about development patterns and intensity of new infill. This plan should be considered a preliminary concept study and not the final recommended plan. To see the Final Plan (i.e., the preferred design solution), please see Section 4.4 of this document.

- The Low Intensity Plan illustrates a less intense potential build-out of Village Place over 20 years.
- Small scale commercial and residential infill vacant or under-utilized parcels, reflective of the character of the Village with a focus south of McCaskill Road, near the Brewery and the Village Center.

	NON-RESIDENTIAL					MIXED USE	RESIDENTIAL				
	CIVIC (GSF)	OFFICE (GSF)	RETAIL (GSF)	HOTEL (KEYS)	LIGHT INDUST. (GSF)	LIVE / WORK (# DU)	MULTI-FAMILY (#DU)	MULTI-FAMILY SENIOR (# DU)	SINGLE FAMILY ATTACHED (# DU)	SINGLE FAMILY DETACHED (# DU)	TOTAL RES. (# DU)
N OF McCASKILL	18,500	52,500	13,000	0	0	6	18	0	4	20	42
S OF McCASKILL	5,500	50,500	24,000	0	0	16	0	0	0	19	19
TOTAL	24,000	103,000	37,000	0	0	22	18	0	4	39	61



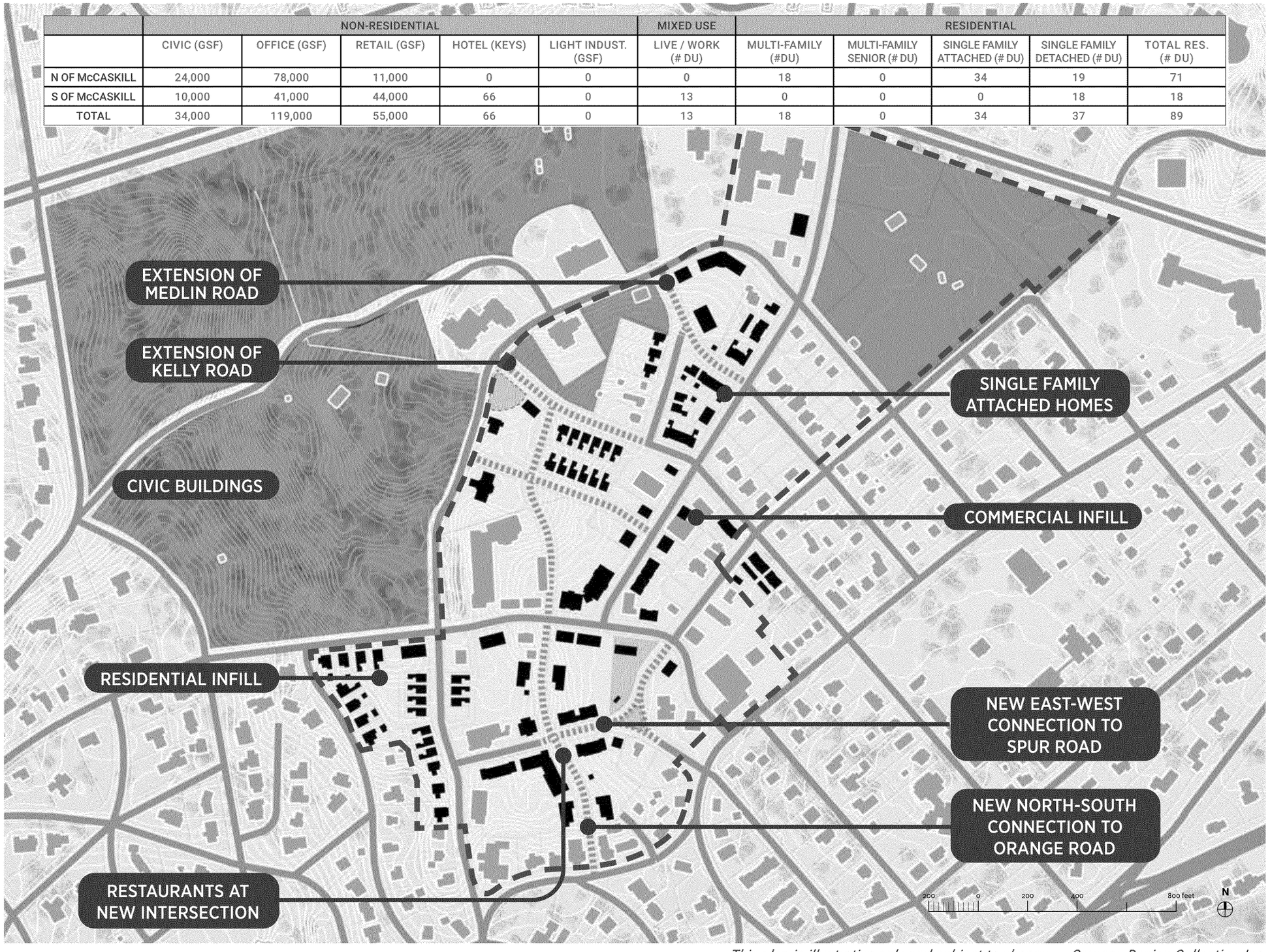
This plan is illustrative only and subject to change. Source: Design Collective, Inc.

Concept Design
High Intensity Plan Option

The High Intensity Plan Option was presented as part of Public Workshop 2. Similar to the Low Intensity Plan, the purpose of this plan was to test opportunity sites; see what building and parking configurations might fit on parcels; and elicit feedback and conversation about development patterns and intensity of new infill. This plan should be considered a preliminary concept study and not the final recommended plan. To see the Final Plan (i.e., the preferred design solution), please see Section 4.4 of this document.

- The High Intensity Plan illustrates a more intense potential build-out of Village Place over 30 years.
- As with the Low Intensity Plan, small scale commercial and residential infill vacant or under-utilized parcels.
- This option differs in the new street alignments, a higher percent of SFA, and moderately increased commercial infill

	NON-RESIDENTIAL					MIXED USE	RESIDENTIAL				
	CIVIC (GSF)	OFFICE (GSF)	RETAIL (GSF)	HOTEL (KEYS)	LIGHT INDUST. (GSF)	LIVE / WORK (# DU)	MULTI-FAMILY (#DU)	MULTI-FAMILY SENIOR (# DU)	SINGLE FAMILY ATTACHED (# DU)	SINGLE FAMILY DETACHED (# DU)	TOTAL RES. (# DU)
N OF McCASKILL	24,000	78,000	11,000	0	0	0	18	0	34	19	71
S OF McCASKILL	10,000	41,000	44,000	66	0	13	0	0	0	18	18
TOTAL	34,000	119,000	55,000	66	0	13	18	0	34	37	89



KEY

- SMALL AREA PLAN (SAP) BOUNDARY
- VILLAGE OF PINEHURST
- EXISTING ROADS
- PROPOSED ROADS
- PROPOSED ALLEYS
- EXISTING PARKS/OPEN SPACE
- PROPOSED PARKS/OPEN SPACE

This plan is illustrative only and subject to change. Source: Design Collective, Inc.

Overview

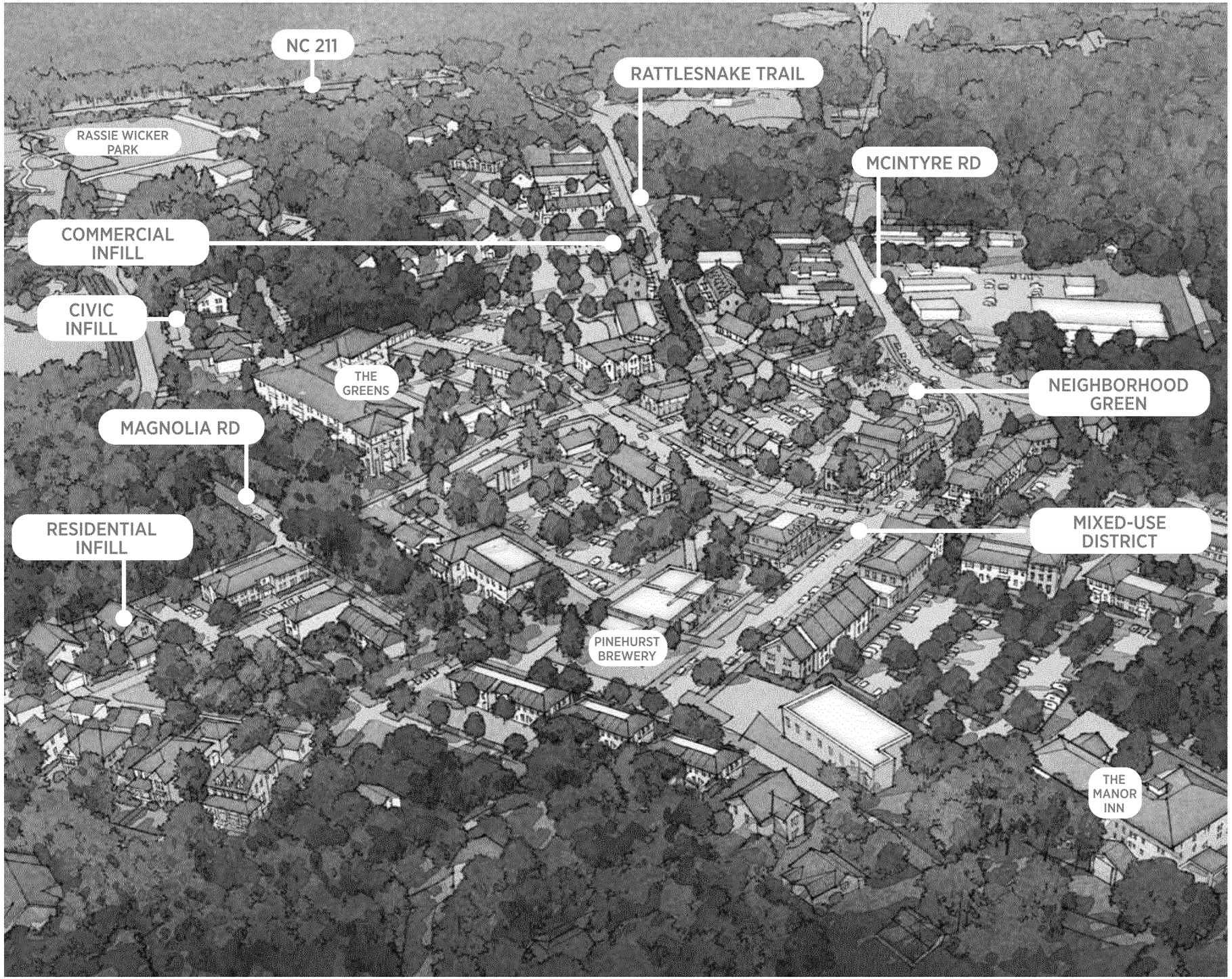
The Final Design comprises renderings, framework plans, and street sections that represent the culmination of the planning process and feedback heard through the project's Public Outreach efforts. It also incorporates the Guiding Principles, discussed in Section 4.2 of this document. The Final Design includes recommendations for land use and transportation throughout Village Place and illustrates the intent of the vision through graphics and text. It is important to note that the plans and renderings herein are illustrative only; development will occur as individual property owners come forward with development plans. The Form-Based Code (FBC), a companion document to this report, is the regulatory document that will ensure development plans (whether by the private or public sector) abide by the recommendations of this *Village Place Small Area Plan*.

The Aerial Rendering to the right demonstrates how Village Place may appear at full build-out. The rendering shows the following:

- A focus of Mixed-Use south of McCaskill Road
- A new Central Green as a focal point to the new mixed-use, small-scale development south of McCaskill Road; the green will serve as a space for community events and gathering
- Commercial infill along Rattlesnake Trail
- Residential infill west of Magnolia Road as a transition to the existing, adjacent single-family residential areas
- Civic infill along Magnolia Rd as an expansion of existing civic uses in that area

The Eye-Level Rendering on the following page shows a conceptual view of the new, main intersection south of McCaskill Road.

The renderings are conceptual and represent one of many scenarios that could happen over the next 30+ years in Village Place. Future development will depend on the interest of public and private property owners in developing or selling their property. The development will also be dependant on future changes to the market demand in the Village of Pinehurst.



VILLAGE PLACE - AERIAL RENDERING

This rendering is illustrative only and subject to change. Source: Design Collective, Inc. & Zanetta Illustration



VILLAGE PLACE - EYE LEVEL RENDERING

This rendering is illustrative only and subject to change. *Source: Design Collective, Inc. & Zanetta Illustration*

Detail Plan

The Detail Plan illustrates the potential build-out of the Village Place core area south of McCaskill Road, showing new buildings, streets, parking, and open space.

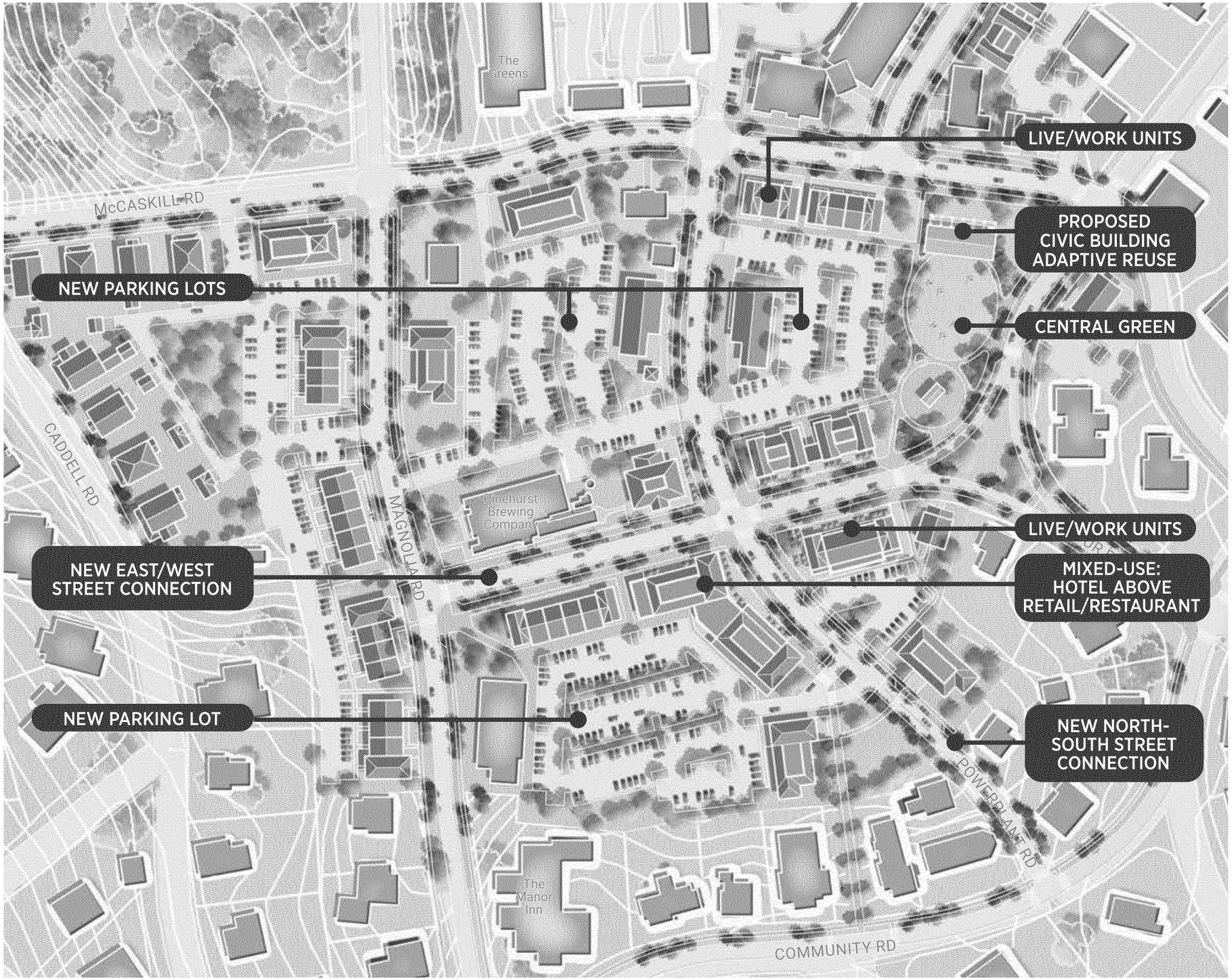
At the center, two new streets crisscross the area. Their intersection creates a hub for new restaurants, a hotel, Live/Work units, and professional offices. Parking is accommodated mid-block and as parallel on-street spaces.

Single-Family Detached (SFD) homes along McCaskill Road and Caddell Road help to transition to existing residential areas.

A new Central Green anchors the new infill area, serving as a gathering place for small community events, while a pedestrian passage links the area to Community Road, encouraging pedestrian circulation to and from the Village Core.

KEY

- EXISTING BUILDINGS
- PROPOSED BUILDINGS
- PROPOSED CIVIC BUILDINGS



This plan is illustrative only and subject to change. Source: Design Collective, Inc.



Precedent - Multi-Family - Daniel Island, SC
Credit: Daniel Parolek /Island Press



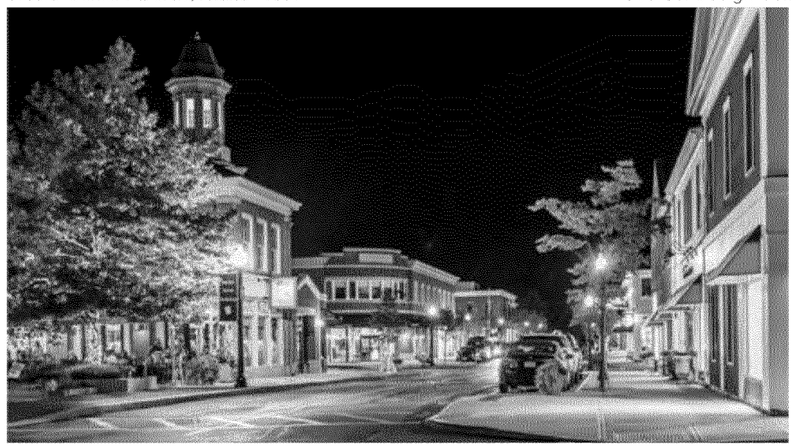
Precedent - Single Family Attached House - Baxter Village, NC
Source: Design Collective



Precedent - Single Family Detached House - Daniel Island, SC
Credit: www.homefinder.com



Precedent - Single Family Detached House - Maple Lawn, MD
Source: Design Collective



Precedent - Mixed Use - Mashpee Commons, MA
Credit: Congress for New Urbanism



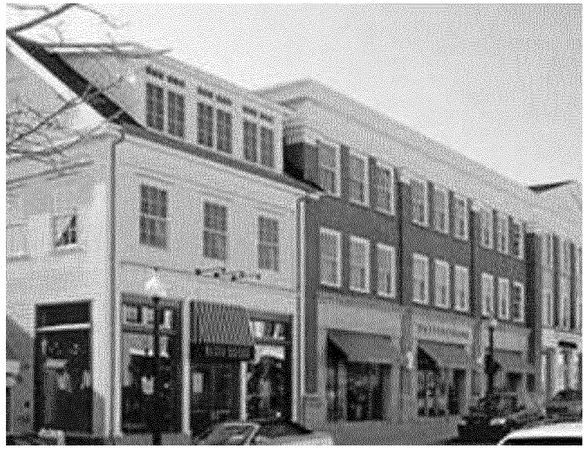
Precedent - Mixed Use - Mashpee Commons, MA
Credit: PCA Design



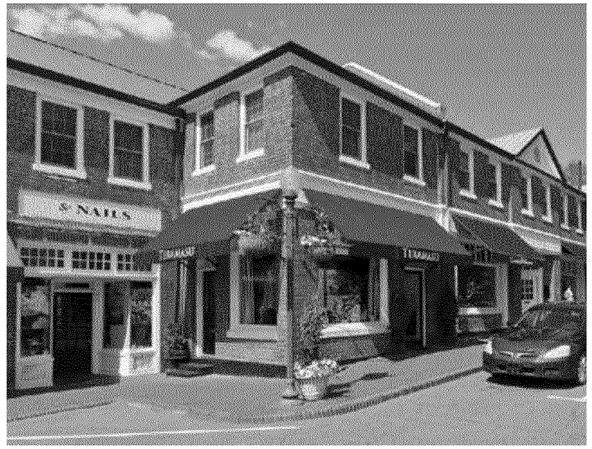
Precedent - Streetscape - Village Center, Pinehurst
Source: Design Collective



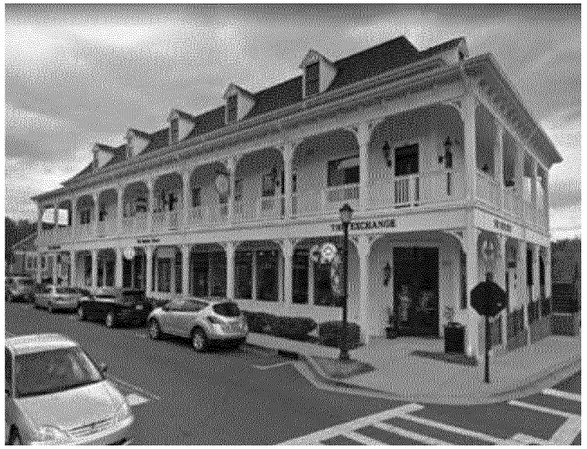
Precedent - Live/Work Units - Habersham, SC
Credit: Missing Middle Housing



Precedent - Live/Work Units - Mashpee Commons, MA
Credit: Michigan Municipal League



Precedent - Mixed Use - Market Square, Pinehurst
Credit: VOP Rentals



Precedent - Mixed-Use: Hotel Retail/Restaurant - Baxter Village, SC
Credit: Google Maps

Proposed Open Space + Pedestrian Network

While Open Space is abundant in Village Place, new development should add to the network, creating publicly-accessible greens, plazas, and potentially an amphitheater located near the Village Hall and Arboretum.

A new Central Green is proposed southeast of Rattlesnake Trail and McCaskill Road to complement the new mixed-use core south of McCaskill, where the Village's Public Services Complex is currently located.

A new pedestrian path is proposed from McCaskill Road, south through the new open spaces, connecting to Community Road and then to the Village Center. Additionally, sidewalks will be added as new streets are constructed, creating a walkable, pedestrian-friendly environment.

KEY

- SMALL AREA PLAN (SAP) BOUNDARY
- VILLAGE OF PINEHURST
- EXISTING GREENWAY TRAILS
- EXISTING WALKWAY TRAILS
- EXISTING SIDEWALKS
- PROPOSED SIDEWALKS*
- EXISTING PARKS/ OPEN SPACE
- PROPOSED PARKS/ OPEN SPACE

** Proposed sidewalks shall be brick in commercial areas*



This plan is illustrative only and subject to change. Source: Design Collective, Inc.



Proposed Amphitheater Rendering
Source: Design Collective



Open Space - Attached Greens- Maple Lawn, MD
Source: Design Collective



Open Space - Plaza
Source: Design Collective



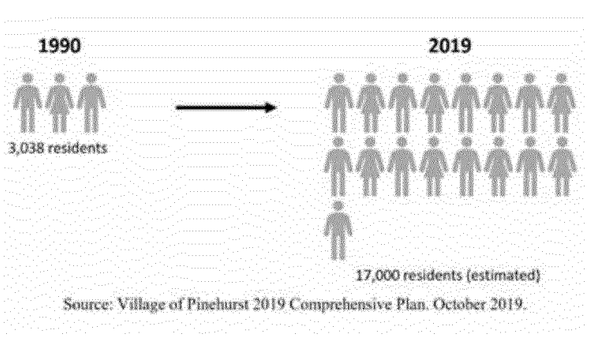
Open Space - Farmers Market
Credit: Community Farmers Market

TRAFFIC & TRANSPORTATION

Introduction

The Village of Pinehurst (Village) is a desirable community attracting new residents and businesses, and some Village residents are concerned about the impact of growth on the existing quality of life, particularly further vehicular traffic impacts.

In 2019, the Village of Pinehurst completed the "Envision the Village" community initiative to adopt the 2019 Comprehensive Plan. The 2019 Comprehensive Plan is an approved guide for the future vision and policy framework for development in Pinehurst. The plan established five focus areas which represent the most important areas to influence, as development in these areas could have the most significant impact on shaping the future of Pinehurst. Two of the focus areas are being evaluated in deeper detail with this study: Village Place/Rattlesnake Trail Area and Pinehurst South/Highway 5 Commercial Area.



Source: Village of Pinehurst 2019 Comprehensive Plan. October 2019.

This Small Area Plan (SAP) effort aims to recommend improvements to the Village Place/Rattlesnake Trail Area (hereafter referred to as Village Place) and Pinehurst South/Highway 5 Commercial Area (hereafter referred to as Pinehurst South) that will improve the transportation network while maintaining the future vision for the Village of Pinehurst. For Village Place, this study provides a plan to create a mixed-use, walkable area that connects Village Place to the Village Center. For Pinehurst South, this study provides a plan to apply the planning principles of Tufts, Olmsted, and Manning to Pinehurst South while also providing connection to the Village Center via bicycle and pedestrian facilities to encourage reduced traffic on NC 5.

Village Place

Most of the streets in Village Place follow the original Olmsted plan and, according to the U.S. Department of the Interior/National Park Service, these streets:

> *"…are frequently named after native trees and are curvilinear, providing a more relaxed approach to "getting there", compatible with a resort environment. The width of the roads was designed to be sixty feet between lot lines. Sixteen feet of this was used for a hard surface road made of sand and clay. On each side of the road there was a sixteen-foot shrubbery bed and beyond each bed a five-foot sand and clay sidewalk."*

Existing Transportation and Infrastructure Conditions

STREETS

Most of the transportation network within the Village Place Study Area consists of local streets. The only changes to these streets over time is that the sixteen-foot clay and sand road surfaces have been paved with asphalt and are now typically eighteen (18') to twenty feet (20') wide. The streets are smooth and range from fair to good condition. The North Carolina Department of Transportation (NCDOT) plans to resurface US 211 in 2024, which is on the north end of this study area.

Travel on the streets within the study area consists of motorized vehicles, golf carts, bicycles, and pedestrians. Although some conflict points exist, these modes of travel currently coexist well together within the shared 18- to 20-foot roadway width. The speed limit on the streets is 25 miles per hour (MPH) and traffic is controlled by stop signs, with the exception of US 211, which has a posted speed limit of 45 MPH to 55 MPH (55 west and 45 east) and a traffic signal at its intersection with Rattlesnake Trail. A review of reported traffic accidents from 2015 to 2019 along the streets in Village Place reveals only minor incidents such as struck deer in road, vehicle backing from private drive, and sideswipe (mirrors colliding) due to narrow street lane conditions. There are several reported accidents along the section of US 211 between McKenzie Road and Rattlesnake Trail that may warrant further investigation.

BICYCLE AND PEDESTRIAN

Despite sidewalks being part of the original Olmsted plan, there are several streets within Village Place that do not have sidewalks, as shown on the Open Space + Trails + Sidewalks plan diagram on page 25 of this document.

Improvements to the sidewalk network in the area have been a noted community concern in the past: the 2015 Comprehensive Pedestrian Plan makes several recommendations for sidewalk installation in this area, and the 2019 Comprehensive Plan noted that a lack of sidewalks and pedestrian connections was raised as a community concern. As part of a funded project, sidewalks have been installed along the east side of Rattlesnake Trail from US 211 to Woods Road and along the north side of Woods Road from Rattlesnake Trail to Dundee Road. These two portions of sidewalk complete a needed pedestrian connection between the VOP Community Center and the new Pinehurst Elementary School on Dundee Road.

GOLF CARTS

Golf carts are allowed on most of the streets within the Village Place study area and coexist well with existing motorized traffic. Concerns over golf cart safety and increased use was expressed in some of the public input received during this planning process.

Traffic Impacts of Village Place Build-Out Plan

Based on the 50-year Build-Out Development Plan for the Village Place Area, traffic was generated for the proposed new land uses based on the Institute of Transportation Engineers (ITE) trip generation manual, which is universally accepted by Traffic Engineers and Planners to project future traffic based on various land-uses. Traffic was generated for the two development options, Low Intensity and High Intensity, for the Village Place study area.

TRIP GENERATION

As development is phased in over the next 50 years, there will be a total of about 7,714 new trips per day created by the Low Intensity development scenario to about 11,191 new trips per day created by the High Intensity scenario. See tables on the following page for a summary of the total trips generated for these options.

Because the proposed development is a mixture of uses (residential, retail, restaurant, etc.), not all of these trips will result in actual new vehicle trips. Some of these trips will be absorbed by internal capture as patrons of the new shops may also decide to dine at one of the new establishments, thus eliminating a new vehicle trip (these are known as "internal capture" trips).

Based on internal capture and the pass-by trips, the total new vehicle trips per day will be reduced by about 20%. This trip reduction is due to internal capture and is an accepted practice by Transportation Engineers and Planners. Based on the ITE Trip generation rates and pass-by/internal capture reduction of 20%, it is estimated that there will be an additional 6,171 vehicles per day (vpd) to 8,952 vpd.

TRIP DISTRIBUTION

The 6,171 to 8,952 new vehicle trips that will gradually be introduced to the streets within Village Place over the 50-year phased build-out plan. As development is phased-in over time, the new vehicle trips will be evenly distributed to the local street network (Magnolia Road, Rattlesnake Trail, McCaskill Road, Dundee Road, Community Road, etc.) as well as distributed to new local streets which will be built with the new development as phased-in.

TRIP IMPACTS

The new traffic will be distributed amongst the existing street network as well as to the new streets built with the new developments, establishing new connections and access within Village Place. The existing street network and new streets/connections will be able to accommodate the gradual increase in traffic over time without a measurable increase in traffic congestion.

Village Place Opt A - Low Intensity Scheme				
		Daily Trips (vpd)	AM Peak Hour Trips (vph)	PM Peak Hour Trips (vph)
North of McCaskill Road	Subarea A	64	13	71
	Subarea B	519	71	115
	Subarea C	170	5	15
	Subarea D	1,828	223	215
	Subarea E	857	159	67
Subtotal		**3,438**	**471**	**483**
South of McCaskill Road	Subarea F	268	9	23
	Subarea G	829	171	130
	Subarea H	1,602	183	196
	Subarea I	30	6	68
	Subarea J	289	45	94
	Subarea K	1,258	189	167
Subtotal		**4,276**	**603**	**678**
TOTAL		**7,714**	**1,074**	**1,161**

Village Place Opt A - High Intensity Scheme				
		Daily Trips (vpd)	AM Peak Hour Trips (vph)	PM Peak Hour Trips (vph)
North of McCaskill Road	Subarea A	125	24	77
	Subarea B	515	75	115
	Subarea C	188	13	18
	Subarea D	2,164	244	244
	Subarea E	825	194	133
Subtotal		3,817	550	587
South of McCaskill Road	Subarea F	388	17	32
	Subarea G	1,329	191	173
	Subarea H	1,652	192	201
	Subarea I	58	12	71
	Subarea J	2,388	247	245
	Subarea K	1,559	170	191
Subtotal		**7,374**	**829**	**913**
TOTAL		**11,191**	**1,379**	**1,500**

It is anticipated that, as traffic volumes increase, there will be added facilities and accommodations so that pedestrians and bicyclists can coexist with increased motorized traffic.

Transportation Improvements

The following improvements to the transportation infrastructure are recommended to be phased-in as development occurs within Village Place to enhance access, connectivity, pedestrian accommodations, and to calm/slow traffic.

ROADWAY/STREET

Additional street connections are needed within Village Place to provide improved traffic dispersion, more direct pedestrian, and vehicular connections, as well as access to future development sites. Street connections through the area south of McCaskill Road, near the Pinehurst Brewing Company, were shown in the 2011 Village of Pinehurst Thoroughfare Plan. These connections identified in the Thoroughfare Plan are included in the SAP's recommended street network improvements, with some modifications. The street network improvements will provide route choices to the Village Center and other development sites which will reduce traffic volumes on some of the existing streets as travel will become more distributed across the network with better access to the Village Center and other Village Place destinations. The Proposed Circulation Plan on page 66 of this document provides a visual of the proposed street network.

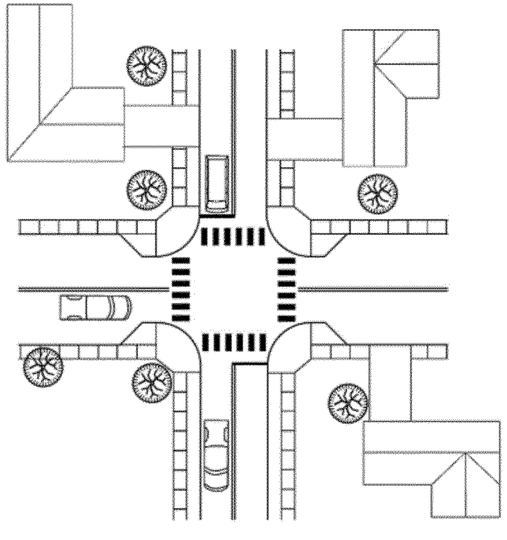
TRAFFIC CALMING

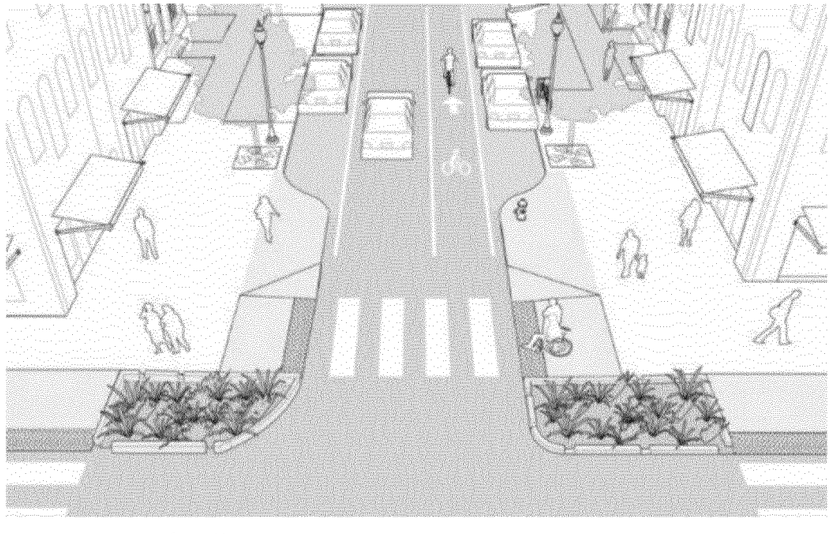
Speeding and traffic volumes on the local streets is an existing concern for residents and will continue to be a concern with the completion of the new Pinehurst Elementary School on Dundee Road and future development within Village Place. To address speeding concerns, it is recommended that additional multi-way stops be installed, additional cross-walk treatments be added, and that traffic calming devices be considered along streets within Village Place. Traffic calming devices can include strategies such as speed humps, intersection extensions/bulb-outs, mini roundabouts, and raised intersection treatments. Intersection improvements at critical intersections could be phased over time as funding becomes available; additional stop signs including some multi-way stops and marked crosswalks are low-cost investments that could be implemented immediately while speed humps/tables, intersection extension/bulb-outs, mini roundabouts, and raised crosswalks could be phased-in with new development and/or once full funding is available. The following page shows examples of phased intersection improvements and traffic calming devices

PEDESTRIAN AND BICYCLE

Despite sidewalks being part of the original Olmsted plan, there are several streets within Village Place that do not have sidewalks, as shown on page 25 of this document.

Improvements to the sidewalk network in the area have been a noted community concern in the past: the 2015 Comprehensive Pedestrian Plan makes several recommendations for sidewalk installation in this area, and the 2019 Comprehensive Plan noted that a lack of sidewalks and pedestrian connections was raised as a community concern. To address pedestrian mobility concerns, in late 2021, sidewalks have been installed along the east side of Rattlesnake Trail from US 211 to Woods Road and along the north side of Woods Road from Rattlesnake Trail to Dundee Road. These two portions of sidewalk complete a needed pedestrian connection between the VOP Community Center and the new Pinehurst Elementary School on Dundee Road. However, during the first public workshop, some residents expressed strong concerns over the placement of sidewalks along every street within the Village Place, citing impacts to private property, a lack of need, and alteration of the historic character. SAP recommendations for the pedestrian network strike a balance between improving pedestrian connections where critical, between primary destinations, while not advocating sidewalks be installed on every existing street within the study area, as shown on page 60 of this document. Recommended sidewalks and pedestrian connections will coincide with future development and provide better pedestrian connections between Village Place and the Village Center.





Corner Extension/Bulb-out



Speed Hump



Raised Intersection



Mini Roundabout

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Proposed Circulation Plan

The proposed Circulation Plan for Village Place emphasizes an improved, connected network of streets. This system will provide additional routes for vehicles (as well as for pedestrians, bicycles, and golf carts), thereby reducing traffic stress on a single street. The circulation recommendations include:

- Extension of Medlin Road and Kelly Road
- Two new streets south of McCaskill Road. The north-south street offsets from Rattlesnake Trail and connects to Power Plant Road. The east-west street connects near the Brewery to McIntyre Road.
- Connect Board Branch Road to Medlin Road

KEY

- SMALL AREA PLAN (SAP) BOUNDARY
- VILLAGE OF PINEHURST
- EXISTING STREETS
- PROPOSED STREETS



This plan is illustrative only and subject to change. Source: Design Collective, Inc.

Proposed Street Section - Rattlesnake Trail

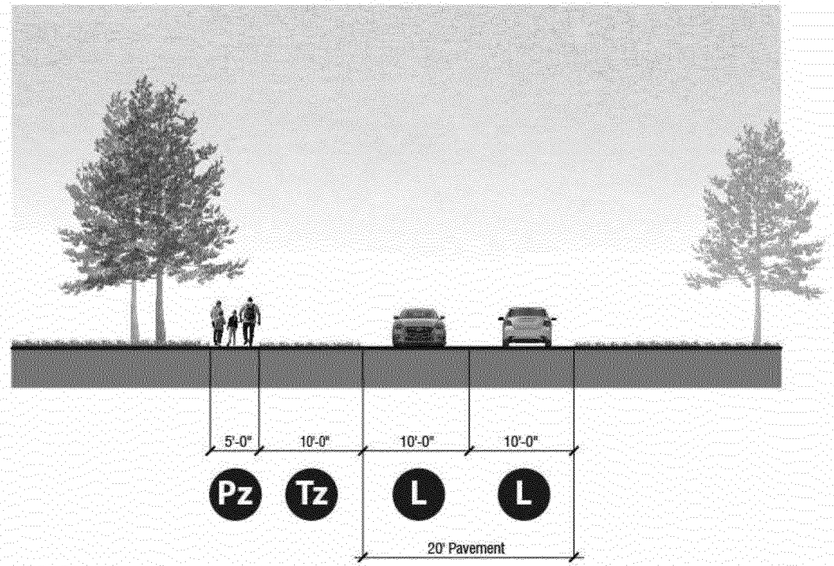
The Proposed Rattlesnake Trail Street Section depicts the addition of a brick sidewalk along the east side as currently being installed by the Village, along with clustered evergreens and deciduous trees with groundcover plantings below.

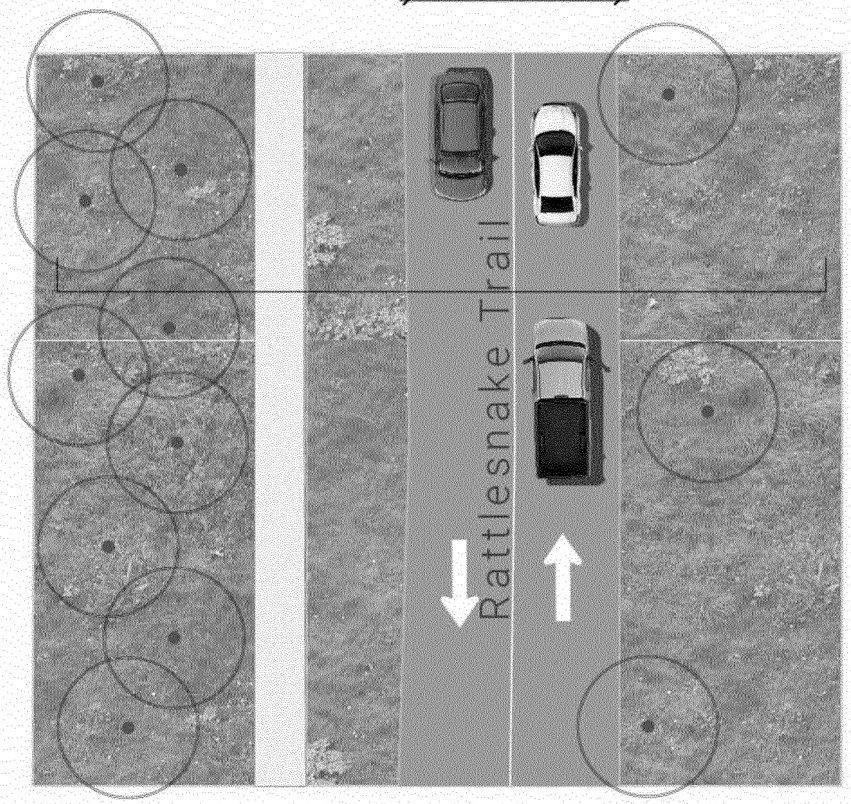
As a gateway to Pinehurst, new development along Rattlesnake Trail should create frontage that frames the street.*

The Village may incorporate parallel parking along Cannon Park to provide additional parking where space is available. Further, for private development, along Rattlesnake from NC-211 to McCaskill Road, as redevelopment occurs, parallel parking shall be incorporated on both sides of the street, where feasible, to provide additional parking spaces for patrons and visitors.

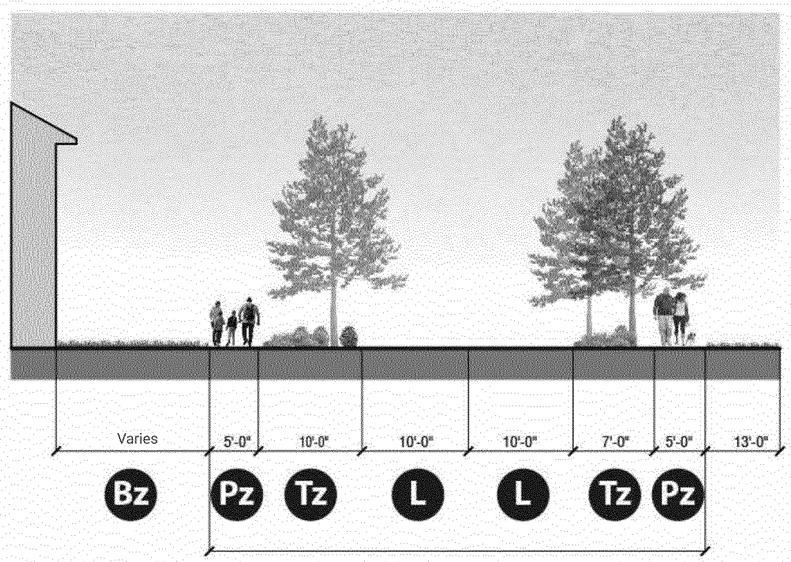
* For additional criteria and more information on frontage and setback requirements, see the *Village Place Form-Based Code*.

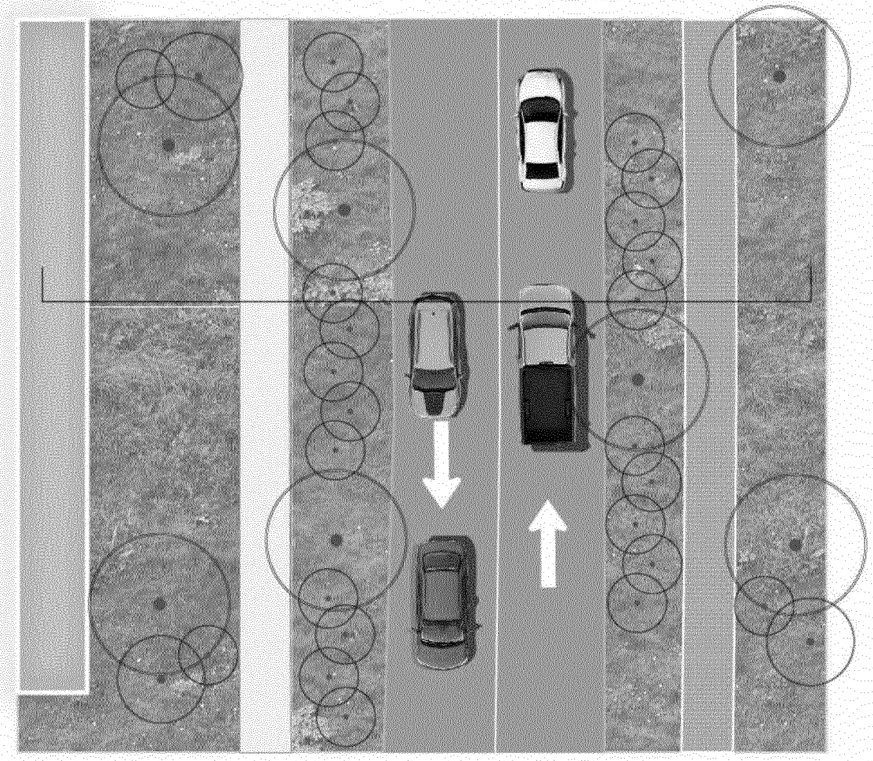
EXISTING





PROPOSED





STREET SECTION KEY

- **Bz** BUILDING ZONE
- **Pz** PEDESTRIAN ZONE (SIDEWALK)
- **Tz** TREE ZONE (PLANTING STRIP)
- **L** TRAVEL LANES (VEHICULAR)

Proposed Street Section - Typical Commercial

The Typical Commercial Street Section is a two-way, two-lane street with parallel parking; street trees and groundcover in stormwater management planters or tree pits; a 5' min. clear pedestrian zone; and a storefront zone for tables, chairs, potted plants, and displays.

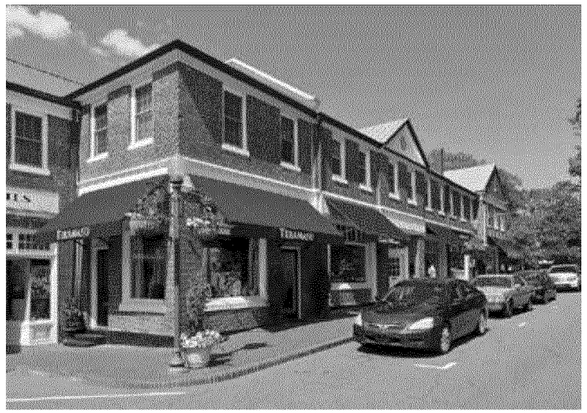
To reflect the character of Village Center, within the Village Place area, brick sidewalks are required where buildings have commercial frontage.* The Village's standard benches and street lights shall also be incorporated.*

Parallel parking shall be incorporated on both sides of the street, where feasible, to provide additional parking spaces for patrons and visitors.*

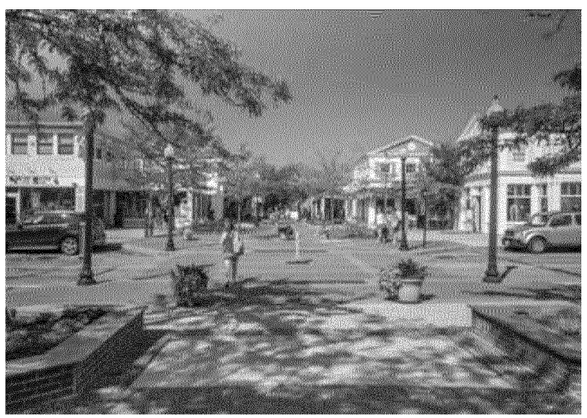
* For additional criteria and more information on frontage and setback requirements, see the *Village Place Form-Based Code.*

STREET SECTION KEY

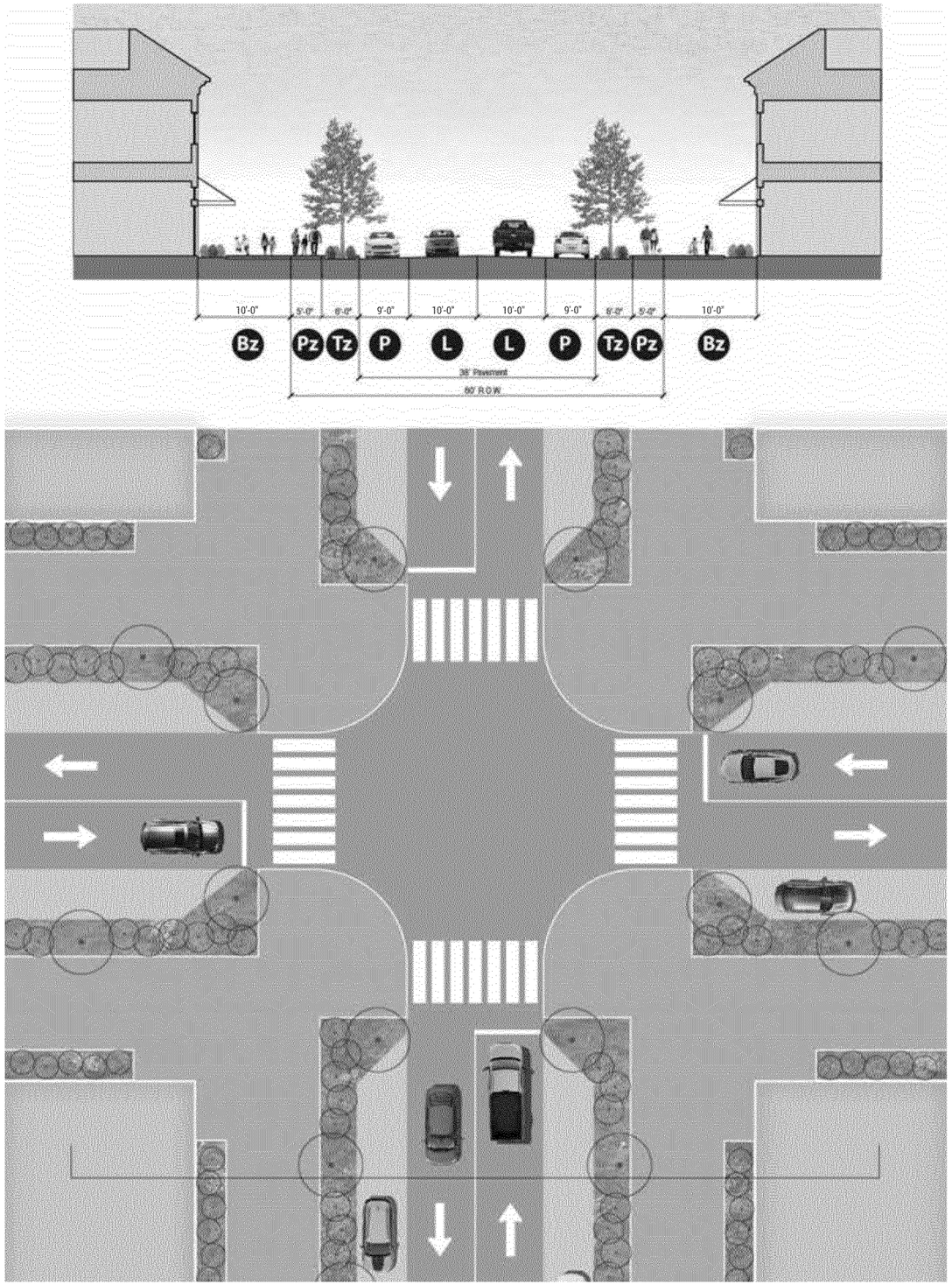
- **Bz** BUILDING ZONE
- **Pz** PEDESTRIAN ZONE (SIDEWALK)
- **Tz** TREE ZONE (PLANTING STRIP)
- **P** PARKING (PARALLEL)
- **L** TRAVEL LANES (VEHICULAR)



Mixed Use - Market Square, Pinehurst
Credit: VOP Rentals



Precedent - Mixed Use - Mashpee Commons, MA
Credit: PCA Design, Mashpee Commons, MA



Proposed Street Section - Typical Residential

The Typical Residential Street Section is a two-way, two-lane street with parallel parking; street trees and groundcover in stormwater management planters or tree lawns; and a 5' min. clear pedestrian zone.

In non-commercial areas, sidewalk material shall be specified as sand/clay, or concrete, as appropriate to context*.

Parallel parking shall be incorporated on both sides of the street, where feasible, to provide additional parking spaces for homeowners and visitors.*

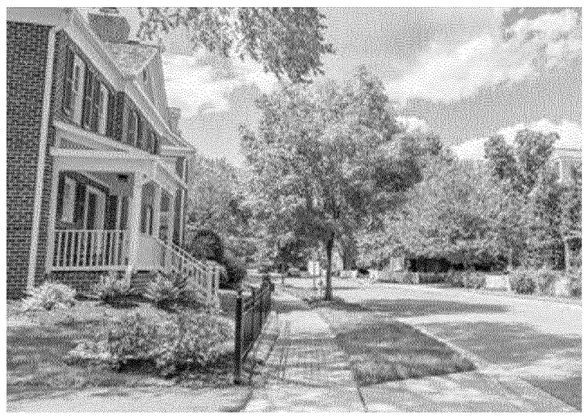
* For additional criteria and more information on frontage and setback requirements, see the *Village Place Form-Based Code*.

STREET SECTION KEY

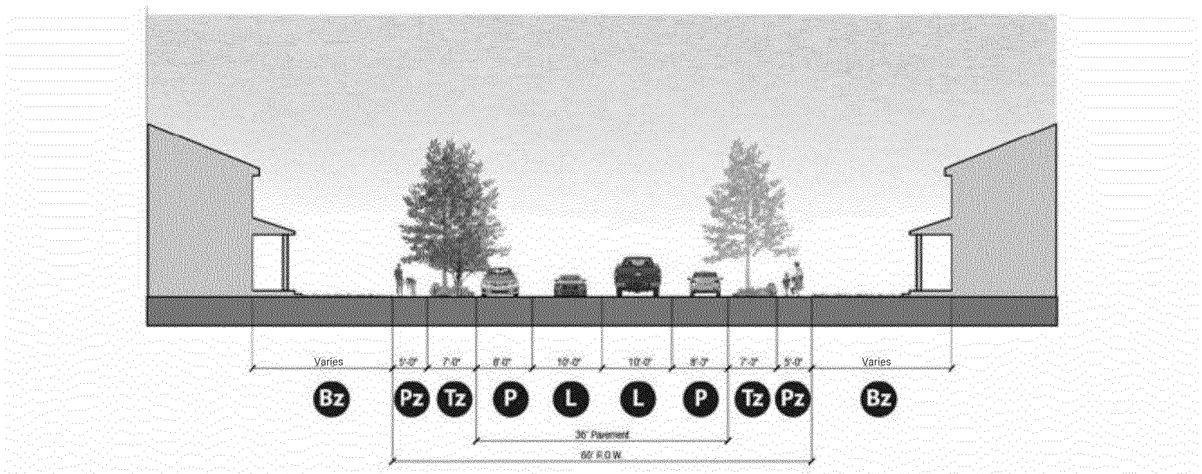
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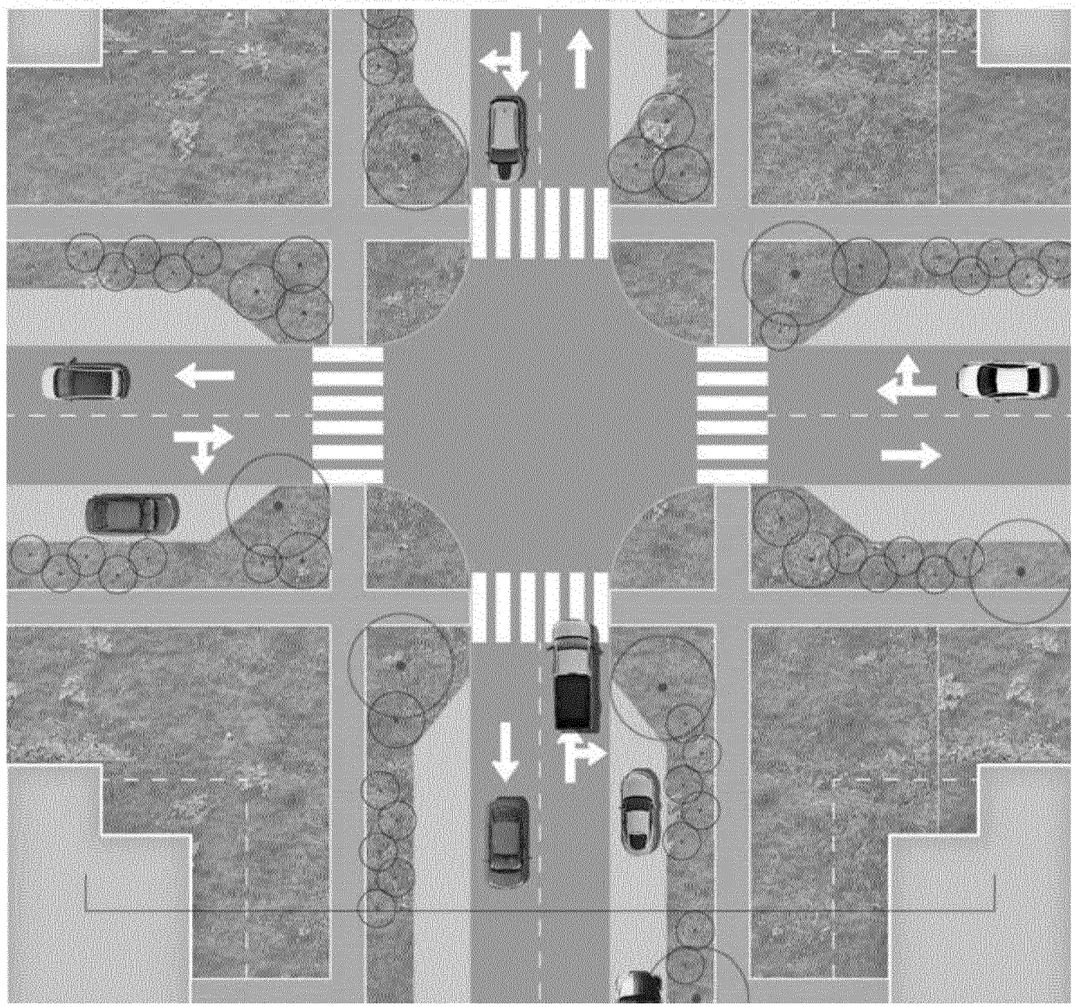


Precedent Residential Streetscape
Source: shortforkfarms.com



Precedent: Residential Streetscape - Kentlands, MD
Source: www.longandfoster.com





Preferred Build-Out Plan

The Preferred Build-out Plan represents one potential scenario of how infill development in Village Place may occur over the next 30+ years. This scenario is illustrative only and should not be considered the only option for this area. The build-out plan is based on the market demand and absorption rates per use, as projected by Duggal Real Estate Advisors (DREA). The V*illage Place Form-Based Code* (FBC) will regulate the character of development, in dimension, material, and detail - see that document for additional information.

The plan shows the following:

- A concentration of Mixed-Use south of McCaskill Road
- A new Central Green as a focal point to new development, located south of McCaskill Road and serving as a space for small community events and gathering
- Commercial infill along Rattlesnake Trail
- Residential infill west of Magnolia Road as a transition to the existing residential neighborhoods
- Civic infill along Magnolia Road as an expansion of existing civic uses in that area

Form-Based Code (FBC)

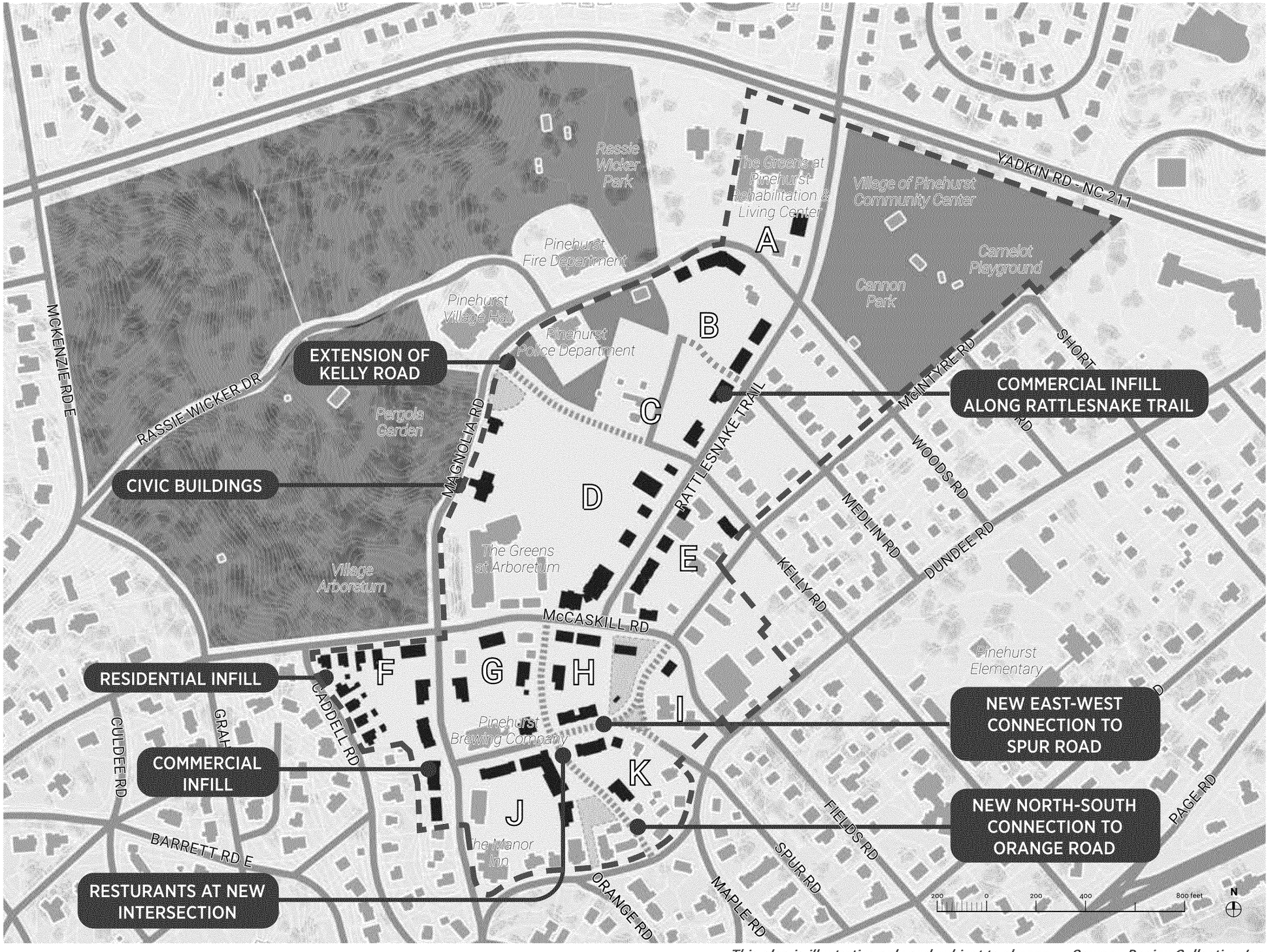
The Form-Based Code (FBC) is a companion document to this Small Area Plan (SAP) report. While this document focuses on the existing conditions analysis, best practice and precedent research, concept design studies, the Final Design plan and recommendations, and stakeholder feedback, it should be seen as an account of the planning process and the intent and vision established collectively. The FBC, on the other hand, is a regulating document, taking the intent and vision established through this planning process and formulating precise development standards that help ensure the vision becomes reality. Property owners, whether from the public or private sector, and their design teams will be required to follow the criteria laid out in the FBC when designing and submitting their intended development or improvement. The Village will use the FBC to review submissions, to ensure they are in compliance.

	NON-RESIDENTIAL					MIXED USE	RESIDENTIAL				
	CIVIC (GSF)	OFFICE (GSF)	RETAIL (GSF)	HOTEL (KEYS)	LIGHT INDUST. (GSF)	LIVE / WORK (# DU)	MULTI-FAMILY (#DU)	MULTI-FAMILY SENIOR (# DU)	SINGLE FAMILY ATTACHED (# DU)	SINGLE FAMILY DETACHED (# DU)	TOTAL RES. (# DU)
N OF McCASKILL	21,000	79,000	7,000	0	0	0	18	0	11	0	29
S OF McCASKILL	10,000	61,000	44,000	66	0	13	0	0	0	8	21
TOTAL	31,000	140,000	51,000	66	0	13	18	0	11	8	50
DENSITY	**Average Non-Residential Density: 0.13 FAR** *(West of NC5: 0.15 FAR, East of NC5: 0.11 FAR)*					**Average Residential Density: 9 DU/AC** (*North of McCaskill: 11.6 DU/AC, South of McCaskill 6.4 DU/AC*)					

*Note this average includes 18 DU of Multi-Family from the previously-approved The Greens at Pinehurst planned development.

Preferred Build-out Plan Diagram

- As noted above, the Preferred Build-out Plan represents one potential scenario of how infill development in Village Place may occur over the next 30+ years.
- As with the Low and High Intensity Plans developed as concepts in Phase 2, small scale commercial and residential infill vacant or underutilized parcels.
- This option increases the amount of infill commercial, while reducing the amount of infill residential.
- The building footprints are illustrative only, but represent the scale and placement of buildings appropriate to the context and historic character of the Village.



This plan is illustrative only and subject to change. Source: Design Collective, Inc.

Proposed Concept Plan - Phasing

Using the Market Analysis demand summary (shown in the charts to the right), the consultant team projected the potential timeframes of the proposed Village Place Build-Out plan. The resulting Absorption Plan (on the following page) illustrates these timeframes. As with the Build-Out Plan, this absorption scenario is illustrative only and should not be considered the only option for this area, particularly considering that it can only occur as private and public property owners express interest in redeveloping or selling their parcels.

Civic

Civic uses were not analyzed as part of the Market Analysis and will be determined and developed as needed by the Village.

Residential

The Market Analysis displayed a high demand for residential; therefore, the potential for any residential building Village Place is likely to be as soon as the next 0-5 years. The amount of residential shown in the Final Plan is much less than the demand, as a result of feedback to consultants by Village staff and representatives.

Office

The amount of Office in the Final Plan exceeds the current demand for this use in Village Place. Therefore, while up to 5,000 SF/year is projected, it will take 30+ years to develop the program shown on this plan. Office near the mixed-use area south of McCaskill Road should be prioritized over those properties closer to NC-211.

Retail/Hospitality

The amount of retail proposed in the Final Plan represents the full build-out potential for Village Place. The build-out of this plan would likely take 10+ years as the demand potential is currently 20-25,000 SF every five years. The demand for retail will likely be higher closer to Village Center, therefore retail around the southern mixed-use core area was prioritized to occur in the near term. Development of retail north of McCaskill Road would likely come later in the build-out of this plan. In conjunction, with the demand for Hospitality uses, a small hotel has been proposed at the main intersection in the core area (see the Detail Plan on page 58).

Golf was not included as part of the proposed plan for Village Place as this was not seen as an appropriate use for this area; golf-related retail and hospitality is included above.

SUMMARY OF MARKET OPPORTUNITY

Land Use	Overall Market Opportunity	Village Place	Pinehurst South
For-Sale Residential	✓✓✓✓✓	✓✓✓✓	✓✓✓✓
For-Rent Residential	✓✓✓	✓✓✓	✓✓✓
Retail	✓✓✓✓	✓✓✓	✓✓✓
Office	✓✓	✓✓	✓✓
Hospitality	✓✓✓	✓✓✓	✓✓✓
Golf	✓✓	O	✓

Key: XXXXX = best, X = worst, O = none

SUMMARY OF DEMAND

Land Use	Demand Potential	Locations within Pinehurst
For-Sale Residential	80-120 homes/year	Almost anywhere
For-Rent Residential	15-25 units/year	Major roads, VP, PS, Village Cntr
Retail	20-25,000 SF/ every 5 years	Major roads, VP, PS, Village Cntr
Office	Up to 5,000 SF/year	Medical area, VP, PS, Village Cntr
Hospitality	25 rooms/yr. in Moore Co.	Resort, Village Cntr, PS, VP
Golf	2-3 courses over the next 10 years in Moore Co.	Focus Area 1 is the only area with space

For additional information regarding the Market Analysis summary, see Section 2.3 of this document.

SUMMARY OF DEMAND FOR LAND USE WITHIN PLANNING AREA

Land Use	Village Place
For-Sale Residential	Unlimited (up to build-out capacity) 1 project would sell approximately 15-25 homes per year
For-Rent Residential	1-2 projects of up to 70-100 units each Timing depends on where else apartments have been constructed (e.g. Village only has demand for 1 project every 5-10 years)
Retail	25,000 - 50,000 SF
Office	25,000 - 20,000 SF Limited amount per year. 5,000 SF total in Village. Village Place could capture some of that, but likely less than Pinehurst South
Hospitality	1 hotel with approximately 75 - 100 rooms as well as bed and breakfasts
Golf	None

Phasing Absorption Plan

In coordination with the Market Analysis, the consultant team developed a potential Absorption Plan to demonstrate the absorption potential based on current demand projections (see the previous page for more information).

KEY

- SMALL AREA PLAN (SAP) BOUNDARY
- VILLAGE OF PINEHURST
- EXISTING ROADS
- PROPOSED ROADS
- PROPOSED ALLEYS
- 0-5 YEARS
- 5-10 YEARS
- 10-20 YEARS
- 20-30 YEARS
- 30+ YEARS



This plan is illustrative only and subject to change. Source: Design Collective, Inc.

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5.0 IMPLEMENTATION

5.1 OVERVIEW

5.2 FISCAL ANALYSIS

5.1 OVERVIEW

[Implementation summary to be included in final report]

Introduction

When new development occurs within the Village of Pinehurst, it brings both new revenues to the Village (primarily in the form of new taxes) and new costs to the Village (in terms of services such as fire protection and police as well as new infrastructure such as roads or sewers). Therefore, an important component to understand the implications of the Small Area Plans (SAPs) is to understand the revenue and costs to the Village of added services and infrastructure based upon future potential plans. This analysis is called a Fiscal Impact Analysis.

To determine the revenue and the costs of added service and infrastructure on the Preferred Build-Out Plans for Village Place and Pinehurst South, the team utilized the **FY 2017 Land Use Fiscal Analysis** completed by the Village of Pinehurst in October 2017. This document provided a net fiscal impact of various types of development in the Village of Pinehurst. These are expressed either as a net surplus or net deficit per acre by land use type. Please see the callout box for important assumptions made in the original document. In addition, refer to the original **FY 2017 Land Use Fiscal Analysis** for the full explanation of methodology and assumptions used to determine the net fiscal impact of different land uses by acre.

One of the major findings for the Village was that the analysis indicated that residential land uses generate more net revenue for the Village than non-residential uses. This is due in large part to the fact that the majority of revenues in the Village are from property taxes and that retail sales tax distributions occur on a per capita basis (as opposed to retail square footage or number of businesses). WThey also noted that certain assumptions about gated communities had a significant impact on the Single Family – Medium Density land use since the communities have security and maintain their own roads. In addition, assumptions regarding vacancy (16% for single-family and 68% for multifamily) had a large impact on the results. Finally, some Multi-family developments do not use the Village's solid waste services and instead contract with a private hauler which impacts costs. It was noted that for future development, Village leaders should consider variables such as private security, private roads, and solid waste collection to determine the true cost of any future residential development.

Results of Fiscal Impact Analysis

Based upon the results of the analysis, utilizing the assumptions as described herein, the Small Area Plans could have the following annual impact on the Village of Pinehurst at build-out (e.g. when the plan is completely built):

- Village Place Preferred Program: -$40,003 estimated total annual impact
- Pinehurst South Program Low: -$32,192 estimated total annual impact
- Pinehurst South Program High: -$18,313 estimated total annual impact

The commercial and the residential land uses in the plans balance each other out to help bring the net fiscal impact fairly close to zero. As noted above, residential land uses have a positive net fiscal impact on the VOP (e.g. more residential in the plans creates more revenue) and commercial land uses have a negative impact on the net fiscal impact (e.g. more commercial in the plans creates less revenue).

Fiscal Impact Assumptions and Methodology

In order to complete the analysis, we utilized the following assumptions:

- We utilized the assumptions regarding surplus or deficit by acre without any changes from the 2017 report. As noted above, this could make some residential land uses appear more beneficial than they are since the SAPs do not contemplate gated communities and for the other various reasons noted above.
- We fit the land use categories from the current SAPs into those land use categories from the 2017 report.

Figure 2 on page 78 outlines how the current land use categories in the SAPs compare to the FY 2017 document.

The next step was to determine the likely acreage associated with the SAPs as the FY document reported the surplus and deficit by acreage. The proposed density is similar to the existing density in the Village Center. The calculations to determine density by land use were completed on a gross net basis, based on typical average lots, plus the minimum required open space at 8%, half the right-of-way, and half the alley, if applicable. The following Figure 3 includes the estimated density of the products by land use that were then used to determine acreage in the SAPs.

Figure 4 on page 79 shows the calculations for each of the potential programs.

Page 1, FY 2017 Land Use Fiscal Analysis

"The 2017 Village of Pinehurst Land Use Fiscal Analysis was prepared by Village staff to determine the approximate net revenues or net expenditures of various land uses within the Village of Pinehurst corporate limits. Properties included in the Village's extra-territorial jurisdiction (ETJ) were not included in this analysis. This land use fiscal analysis was prepared using FY 2017 data and represents an estimate of current revenues and expenditures by land use for that period of time.

This analysis provides revenue and expenditure allocation principals that can be applied to any proposed future development to estimate the financial impact. It is not a perfect predictor of the financial impacts of future development because the impacts of future land uses will vary on a case by case basis. The actual revenues and expenditures generated by one acre of land can vary within the same land use type due to many variables. Therefore, the information contained in this analysis should be used to provide an approximation of the estimated net revenue or cost of development, recognizing the actual revenue and costs associated with any one particular development will likely not be the exact amounts shown in this report."

Figure 1: Land Uses from FY 2017 Land Use Fiscal Analysis Report and Net Impact Per Acre

Land use	Description	Net Annual Surplus (Deficit) Per Acre
Single Family – Low Density	R210: 5 acre lot/ 2,000 SF min	$520
Single Family – Medium Density	R-30: 30,000 SF lot/ 2,000 SF min R-20: 20,000 SF lot/ 2,000 SF min R-15: 15,000 SF lot/ 1,800 SF min	$1,054
Single Family – High Density	R-10: 10,000 SF lot/ 1,800 SF min R-8: 8,000 SF lot/ 1,500 SF min	$806
Multi-family Development	Density varies by zoning jurisdiction	$1,597
Office	General office, medical/dental office, government office, post office	($3,109)
Retail	Retail, car dealership, drugstore	($8,518)
Lodging	Hotel	($2,110)
Recreational	Park, marina, golf course, harness track, tennis facility, fitness center	$52
Institutional	School, church, library	($6,622)
Medical	Hospital, nursing home, clinics	($6,995)
Industrial	Utilities, manufacturing, warehousing	($110)
Services	Bank, real estate office, restaurant, gas station	($3,230)

Figure 2: Land Uses from SAPs Compared to FY 2017 Report

Land Use in SAP	Corresponding Land Use in FY 2017 Report
Civic	Institutional
Office	Office
Retail/Restaurant	40% Retail, 60% Services
Hotel	Lodging
Light Industrial	Industrial
Live / Work	Multi-Family Dev.
Multi-Family	Multi-Family Dev.
Multi-Family Senior	Multi-Family Dev.
Single-Family Attached	Multi-Family Dev.
Single-Family Detached	Single-Family - High Density

Figure 3: Estimated Density by Land Use to Determine Acreage in SAPs

Land Use	FAR*/Dwelling Unit (DU)/Key Per Acre
Civic	1.00
Office	0.50
Retail/Restaurant	0.33
Hotel	50
Light Industrial	0.25
Live / Work	12
Multi-Family	18
Multi-Family Senior	25
Single-Family Attached	10
Single-Family Detached	5.5

* Floor Area Ratio (FAR) is the measurement of a building's total amount of usable floor area in relation to the total area of the lot on which the building stands.

Figure 4: Village Place Preferred Program Calculations

	Non-Residential					Mixed-Use	Residential				
Land Use in SAP	**Civic (GSF)**	**Office (GSF)**	**Retail (GSF)**	**Hotel (Keys)**	**Light Indust. (GSF)**	**Live / Work (# DU)**	**Multi-Family (#DU)**	**Multi-Family Senior (#DU)**	**Single-Family Attached (#DU)**	**Single-Family Detached (#DU)**	**Total Program**
Village Place Program											
N of McCaskill	21,000	79,000	7,000	0	0	0	18	0	11	0	
S of McCaskill	10,000	61,000	44,000	66	0	13	0	0	0	8	
Total	31,000	140,000	51,000	66	0	13	18	0	11	8	
Village Place Program in Acres											
N of McCaskill	0.5	3.6	0.5	0.0	0.0	0.0	1.0	0.0	1.1	0.0	6.7
S of McCaskill	0.2	2.8	3.0	1.3	0.0	1.1	0.0	0.0	0.0	1.5	9.9
Total	0.7	6.4	3.5	1.3	0.0	1.1	1.0	0.0	1.1	1.5	16.6
Village Place Annual Revenue (Deficit) By Land Use											
N of McCaskill	-$3,192	-$11,277	-$2,577	$0	$0	$0	$1,597	$0	$1,757	$0	-$13,693
S of McCaskill	-$1,520	-$8,707	-$16,200	-$2,785	$0	$1,730	$0	$0	$0	$1,172	-$26,310
Total	-$4,713	-$19,984	-$18,777	-$2,785	$0	$1,730	$1,597	$0	$1,757	$1,172	-$40,003

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VILLAGE OF PINEHURST SMALL AREA PLAN

PINEHURST SOUTH

FEBRUARY 1, 2022 | VERSION DRAFT D

Design Collective

DUGGAL REAL ESTATE ADVISORS

Moving forward. RKA RAMEY KEMP ASSOCIATES

1895 VILLAGE OF PINEHURST

ACKNOWLEDGMENTS

ELECTED & APPOINTED OFFICIALS

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Mayor

JUDY DAVIS
Mayor Pro Tem

LYDIA BOESCH
Treasurer

KEVIN DRUM
Councilmember

JANE HOGEMAN
Councilmember

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REVISION TRACKING CHART

Tracking all modifications from Version 1.0, dated January 2022

VERSION	PAGE	CONTENT	REVISION DATE	PLANNING APPROVAL

EXECUTIVE SUMMARY

Executive Summary text will be added to the final report version.

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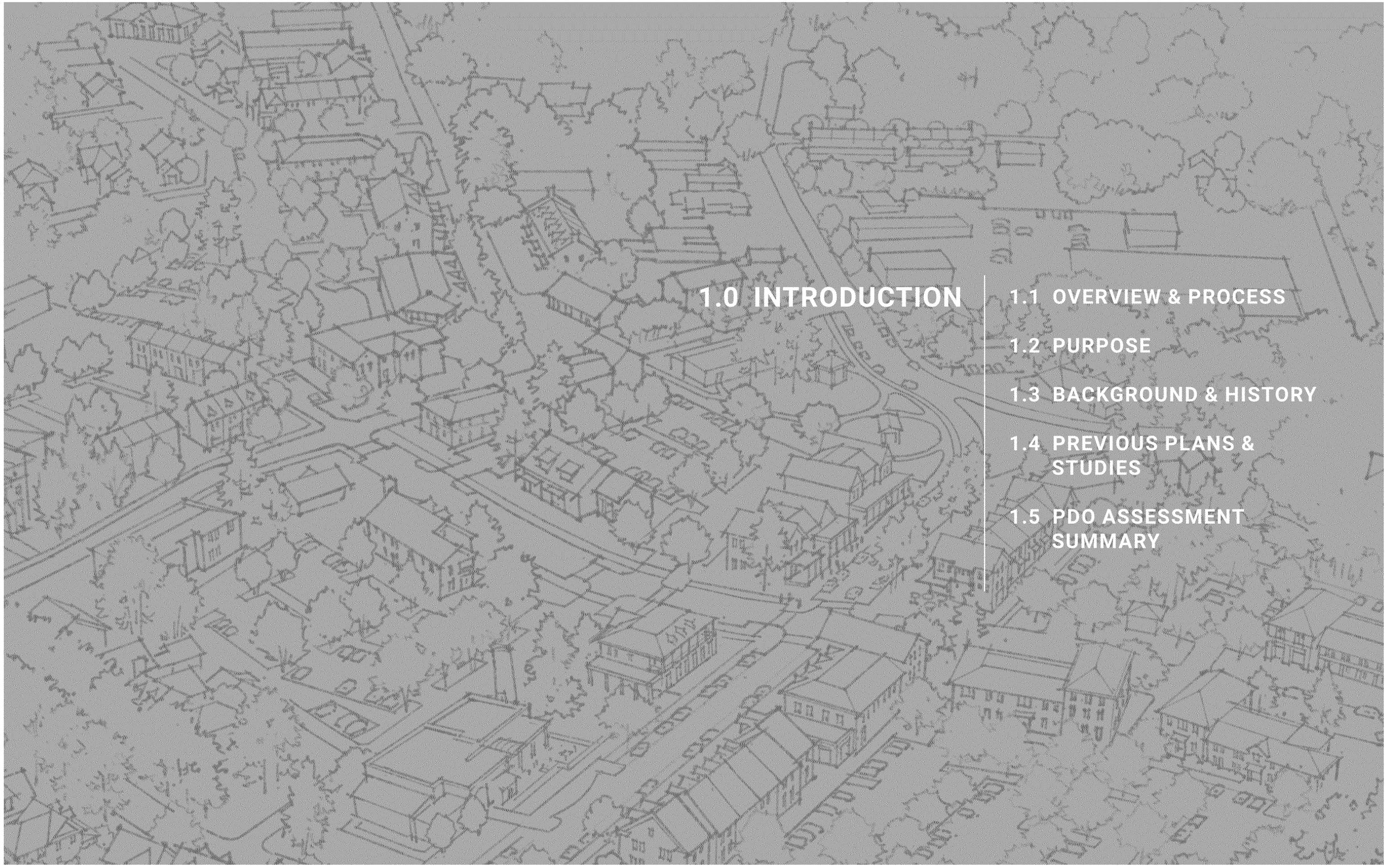
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1.0 INTRODUCTION

1.1 OVERVIEW & PROCESS

1.2 PURPOSE

1.3 BACKGROUND & HISTORY

1.4 PREVIOUS PLANS & STUDIES

1.5 PDO ASSESSMENT SUMMARY

1.1 OVERVIEW & PROCESS

Overview

The Village of Pinehurst identified two locations within the Village boundary, Village Place and Pinehurst South, as areas well-suited to accommodate growth, advance economic development goals, increase revenues and the tax base, and to support the many quality-of-life needs of existing residents, businesses, and visitors.

In an effort to advance these opportunities and create a set of Small Area Plans that respond to the Village's 2019 Comprehensive Plan and guide future development initiatives, the Village of Pinehurst hired Design Collective, Duggal Real Estate Advisors, and Ramey Kemp & Associates. These plans will guide decision making on new development and redevelopment, public and private investments, policy and zoning, and many other important topics that will have a long-term impact on the Village.

The focus of this document is on the Pinehurst South Small Area Plan. For recommendations pertaining to Village Place, please see the *Village Place Small Area Plan*.

The scope for the Pinehurst South Small Area Plan project included planning, streetscape, and landscape design; market/economic analysis; and transportation planning. The consultant team, led by Design Collective, worked on behalf of the Village and prepared plan recommendations, zoning regulations, and development standards specific to Pinehurst South that, once adopted by the Village, will guide future private development as well as public capital improvement projects.

Process

The Small Area Plans effort occurred in the three following phases, with stakeholder involvement in all phases. Work began in November 2020 with adoption projected in late 2021. For additional information on stakeholder input and public feedback, refer to Section 3.0 of this document.

PHASE 1: DATA COLLECTION; EXISTING CONDITIONS INVENTORY AND ANALYSIS

The first step in the process was to fully assess and understand existing conditions; historic, cultural, and environmental assets; neighborhood goals and objectives; realistic market-driven development opportunities; resident and stakeholder concerns and input; constraints and opportunities; and other factors that would inform the Small Area Plan.

Throughout December 2020 and January 2021, the consultant team conducted over 20 key stakeholder interviews, discussing the two plan areas with Village staff, appointed and/or elected officials, agency representatives, committee chairs, residents, local businesses and merchants, golf and tourist industry representatives, major employers, property owners, developers, brokers, and others to further understand their viewpoints. Phase 1 concluded with Public Workshop 1 in February 2021 with approximately 100 attendees.

PHASE 2: PLANNING AND DESIGN

In Phase 2, from March to June 2021, based on the analysis conducted and feedback received during Phase 1, the consultant team designed and compiled Concept Plan Options, Street Sections, Open Space and Street Network Plan Diagrams, Renderings, Precedent Images, and similar for Village Place and Pinehurst South. During this timeframe, the consultant team discussed the two plan areas and concepts with Village staff, appointed and/or elected officials, and key stakeholders and, based on input received, refined the concepts. These concepts were shared in early June 2021 in Public Workshop 2 to solicit further feedback; approximately 59 attendees participated.

PHASE 3: MASTER PLAN REPORT

During Phase Three, the design team presented the final draft plan to the community at a public input event in February 2022. This event provided an opportunity for the public to review and comment on the final draft prior to adoption. The design team then prepared this final master plan report, an illustrated, guiding document that outlines the preferred plan options and supported recommendations for the Pinehurst South Small Area Plan.

The Plan was approved by the Village of Pinehurst Council and recommended for adoption as an element of the _____ through General Resolution #-_____ on _____, 2022.

The Plan was adopted as an amendment to the Village of Pinehurst Development Ordinance by the Village Place Council through Amendment #-_____ on _____, 2022.

Project Goals

The following project goals were identified in the project RFP, issued by the Village:

- Create a small area plan to facilitate redevelopment as an "Innovation Hub" with office, medical, life science, and research facilities with small-scale retail services and residential uses;
- Create an implementable plan to make the community's vision for the area a reality in keeping with previous planning efforts and the newly adopted Comprehensive Plan;
- Economic feasibility, urban design, and improving the public realm (e.g., roadways, sidewalks, parks, plazas, open spaces) are key aspects of this plan that must include specific and achievable actions;
- Extend the vision of Tufts, Olmsted, and Manning from the Village Center to NC-5 and throughout the Pinehurst South study area;
- The Plan should recognize (but not require) the foundational principles set forth in the National Historic District Nomination (Nomination) submitted to the National Park Service in 1994. The area should feature:
  - Abundant landscaping, walking paths and open spaces while
  - Minimizing traffic and maintaining the human scale of buildings.
- Guiding Principles 1, 2, 5 and 7 of the 2019 Comprehensive Plan are especially important to the development of the Small Area Plans;
- Explore traffic relief measures pertaining to NC-5;
- Buffering and mitigating the impact of new development will be an important part of this planning effort;
- Care must be taken to consider the interaction of any proposed new use with existing uses in the area, and to consider the impact of any proposed new use on the surrounding neighborhoods; and
- Provide sufficient and discrete parking for any proposed use will be an important consideration.

Planning Goals

The following planning goals were identified through the development of the *Pinehurst South Small Area Plan*, based on analysis and stakeholder feedback:

- Provide a connected street network that will help disperse and alleviate traffic congestion on NC-5
- Explore placemaking and creating a center east of NC-5, between Monticello and Blake Boulevard, building off the nexus of the Post Office, Pharmacy, ABC, Dowd Cabin, and the new Girls & Boys Club;
- Incorporate a variety of new Open Spaces, to serve surrounding office and residential users and a Shared-Use Path (SUP) adjacent to the Railroad to connect Pinehurst South to the Village Center;
- Explore an alternative approach from the Innovation Center suggested in the 2019 Comprehensive Plan which is likely better suited to Focus Area 3, anchored by an institution;
- Explore variety of residential types (including cottages, townhouses, live-work, and missing middle res.) and infill commercial; and
- Explore the realignment of Monticello Drive to accommodate the relocation of the Village's Public Service Facility from Village Place to the property south of the Harness Track.

Locator Map

The Village of Pinehurst boundary encompasses approximately 17.3 square miles of land area. The two focus areas, Village Place and Pinehurst South, are located to the north and south of the Village Center, the historic hub of the community. Connecting these two focus areas is a range of housing, lodging accommodations, retail, and recreational amenities, including golf courses, lakes, and walking and bike trails.

KEY

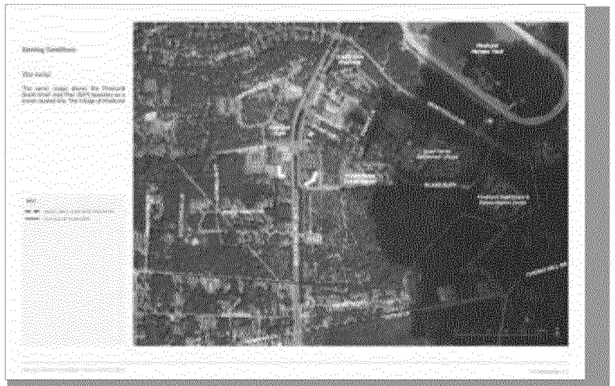
- VILLAGE OF PINEHURST
- SMALL AREA PLAN BOUNDARIES



1.2 PURPOSE

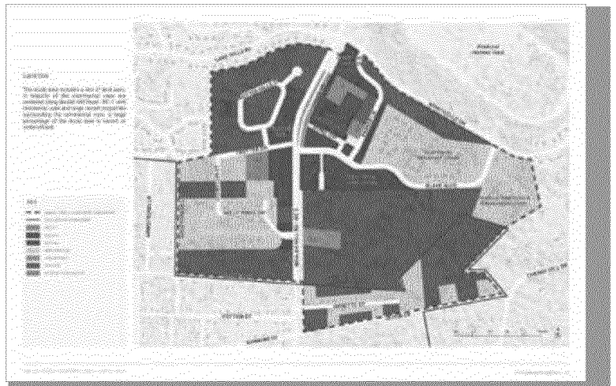
The purpose of this plan is to define the characteristics of future development that are supportable and appropriate for Pinehurst, to guide change towards a predictable and agreed upon outcome. This plan addresses land use; street types; open space; pedestrian and bicycle facilities and connectivity; and numerous other considerations. Recommendations will consider impacts and benefits, traffic, revenues and costs, phasing, zoning, development standards, Pinehurst Development Ordinance (PDO) updates, and other implementation strategies.

The document includes the following components:



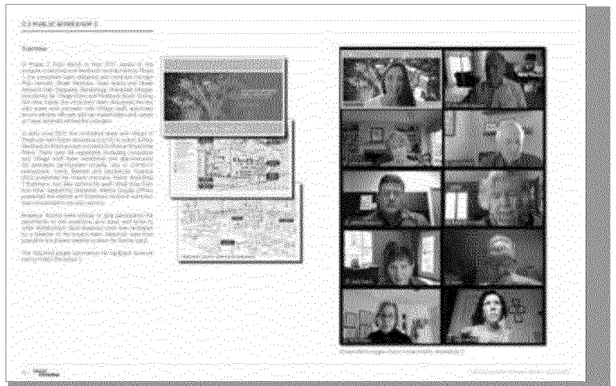
SECTION 1.0: INTRODUCTION

Provides a brief overview of the project location, the objectives and process, and a general description of the document's content.



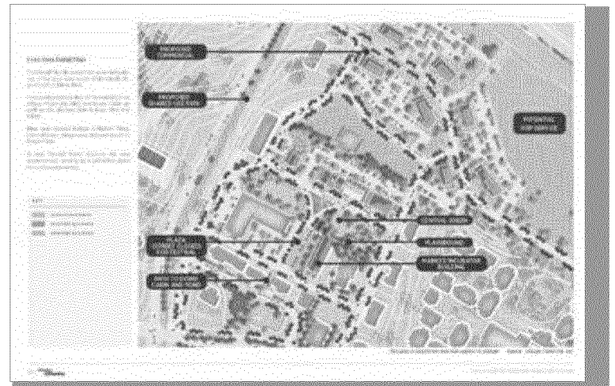
SECTION 2.0: EXISTING CONDITIONS

Examines the physical and market conditions of Pinehurst South through photo documentation, analysis of data, stakeholder interviews, and community feedback.



SECTION 3.0: PUBLIC OUTREACH

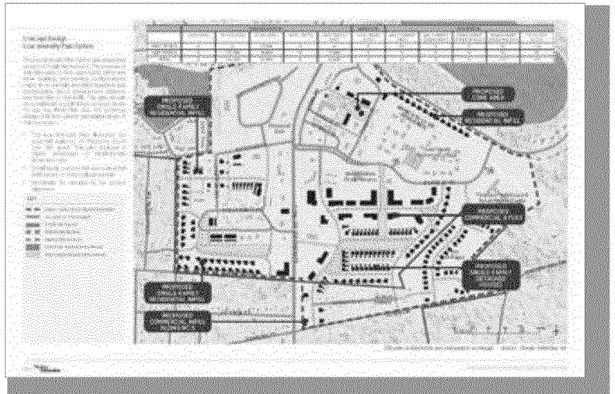
Provides a brief overview of the stakeholder interviews and public workshops that were implemented as part of the public outreach process.



SECTION 4.0: RECOMMENDATIONS

Provides a brief overview of the approach, concept planning, and feedback that the consultant team used as guidance towards the final recommendations.

Highlights development opportunities; describes street systems; and provides illustrative and photographic examples of open spaces and streetscape design elements.



SECTION 5.0: IMPLEMENTATION

Summarizes fiscal analysis data as it relates to the implementation of the proposed concept design and approach for Pinehurst South.

This document does not cover development standards required for construction review within the Pinehurst South Small Area Plan, including Site Design, Street Design, Landscape Design, Architectural Design, and Sign Design criteria. For more information on the on the criteria and the submission and review process, please refer to the Pinehurst South Form-Based Code and the Pinehurst Development Ordinance.

Existing Conditions

Site Aerial

The aerial image shows the Pinehurst South Small Area Plan (SAP) boundary as a brown dashed line. The Village of Pinehurst

KEY

- SMALL AREA PLAN (SAP) BOUNDARY
- VILLAGE OF PINEHURST



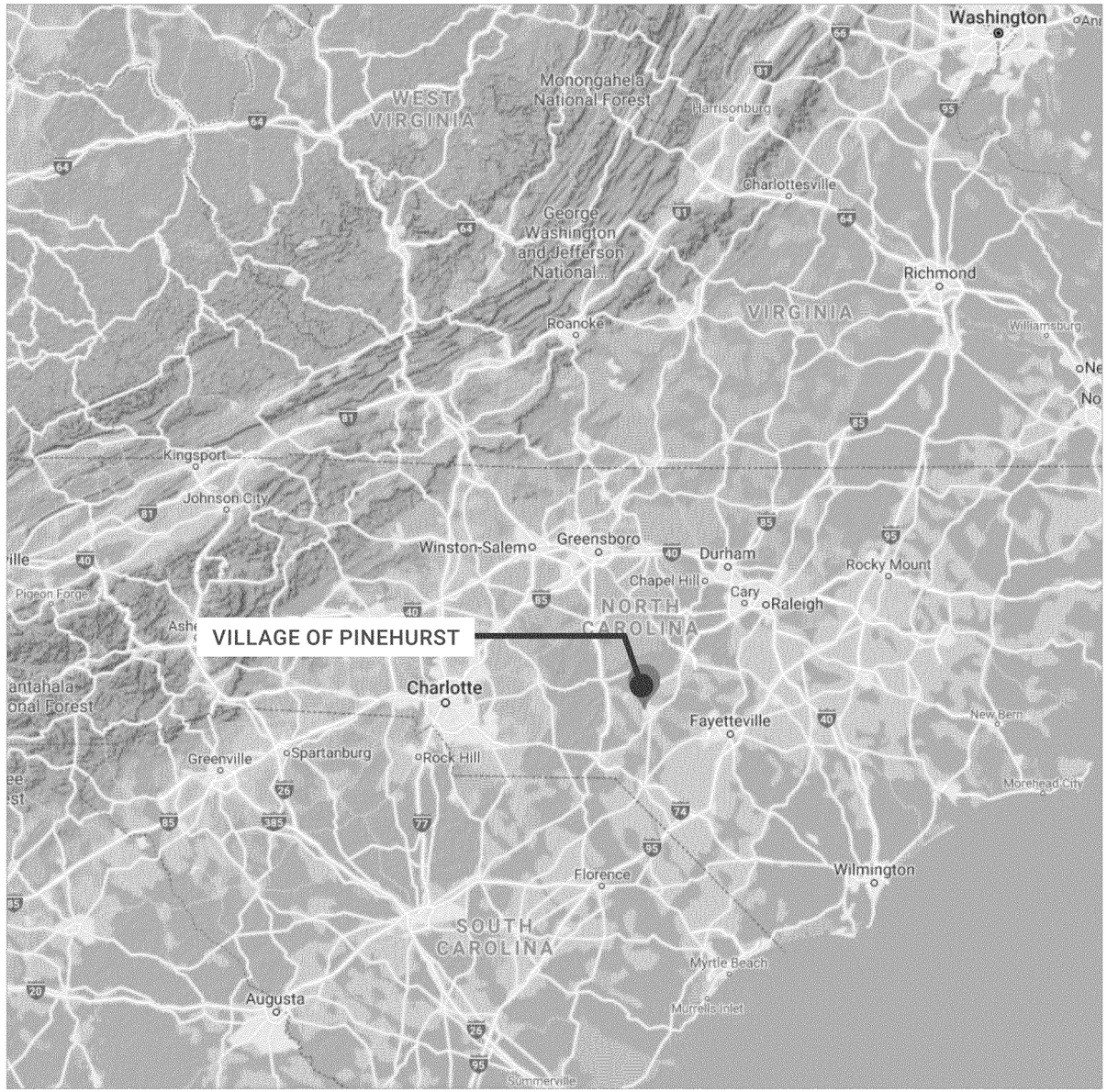
Background and History

The Village of Pinehurst is a small, traditional town located in North Carolina, approximately 70 miles from Raleigh and 100 miles from Charlotte. Located equidistant to these two major cities, the Village is accessed by Yadkin Road - NC 211 and US 15 as the two major thoroughfares that bisect its boundary.

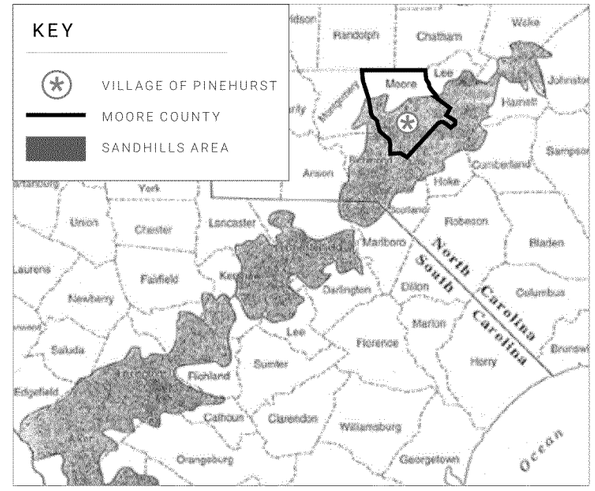
One of two National Historic Landmark Districts in North Carolina, the Village is deeply rooted in its setting and history. The area is nestled in “the Sandhills” of Moore County, characterized by rolling hills, covered by deep coarse sands and forested areas. Longleaf pines, in particular, were a major resource for the region and harvested to produce turpentine for the naval industry and lumber. By the late 1800s, the growth of the Raleigh and Augusta Railroad became a catalyst for industry and development.

By 1895, James Walter Tufts purchased the original lands of the Village, approximately 5,980 acres, to create a health resort and wellness community centered around pulmonary issues. He hired one of the country’s most prestigious landscape architecture firm at the time, Olmsted, Olmsted, and Eliot to plan and design the Village.

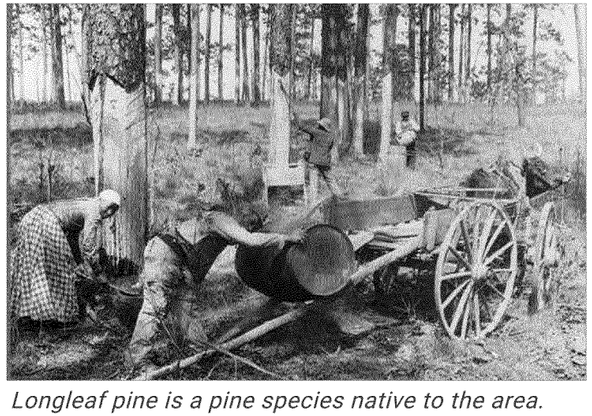
The Village of Pinehurst was first opened in January 1896 with the Holly Inn and several guest cottages as the initial phases of development. Since then, the Village has grown to become an iconic golf destination and anchor site of the U.S. Open, supported by the Pinehurst Resort, a variety of hotels, boutique shops and restaurants, and a wide range of trails, natural amenities, and historic sites for visitors to enjoy.



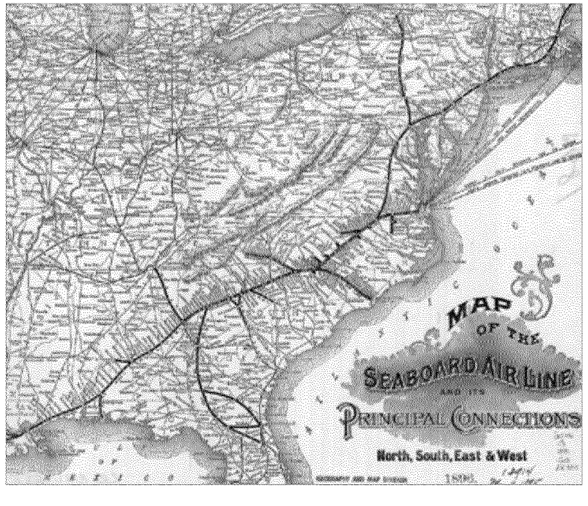
Regional map



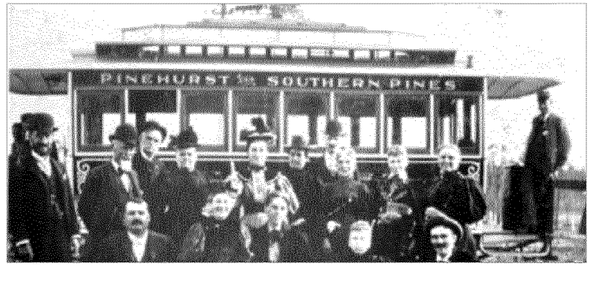
Map of the Sandhills Area

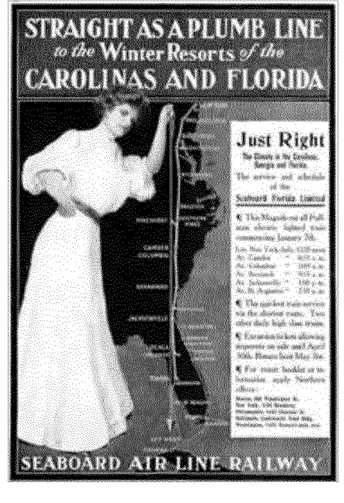


Longleaf pine is a pine species native to the area. Pine resin was extracted and collected into barrels for distilling into turpentine used to make oil paint for ships and buildings.

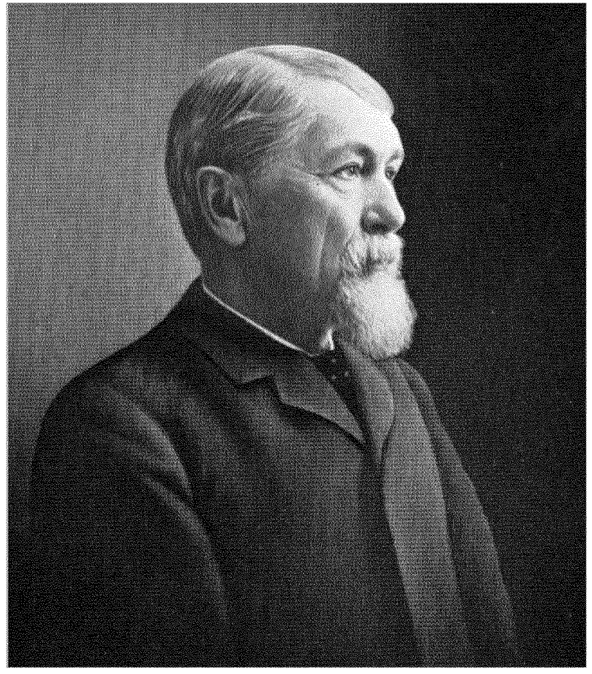




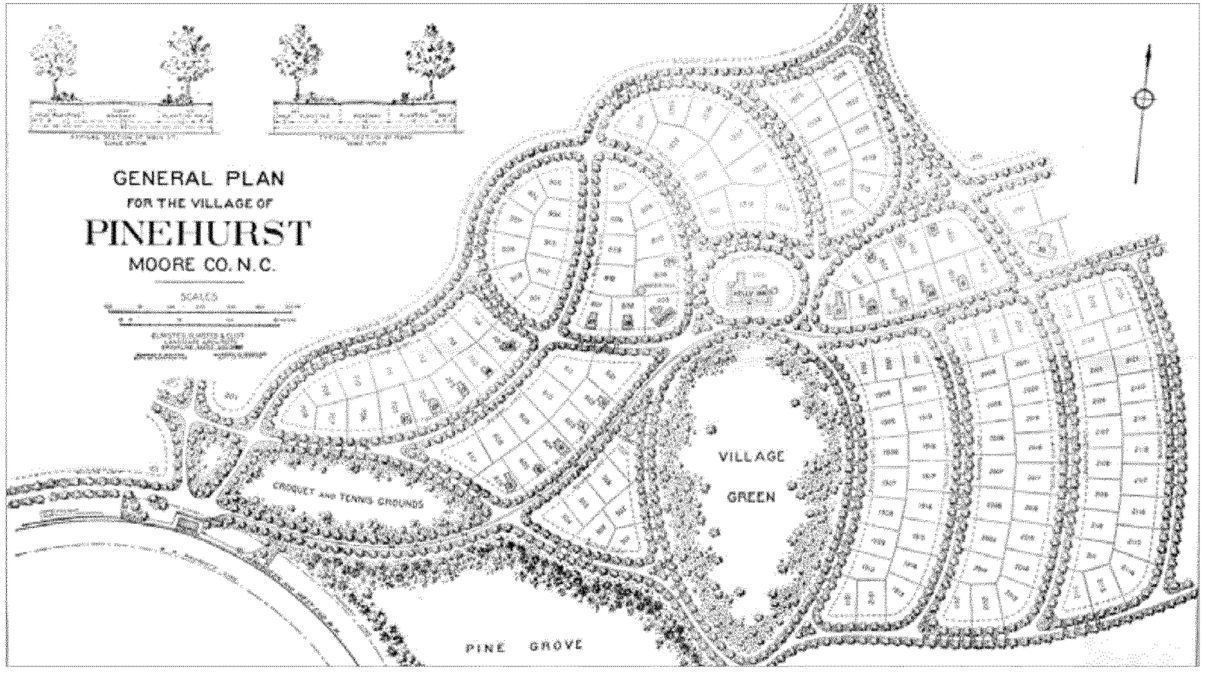




In the 1800s, pollution in cities and the expansion of rail lines to the south provided the catalyst for people to retreat to warmer and healthier environments, contributing to the growth and development of parts of North Carolina.



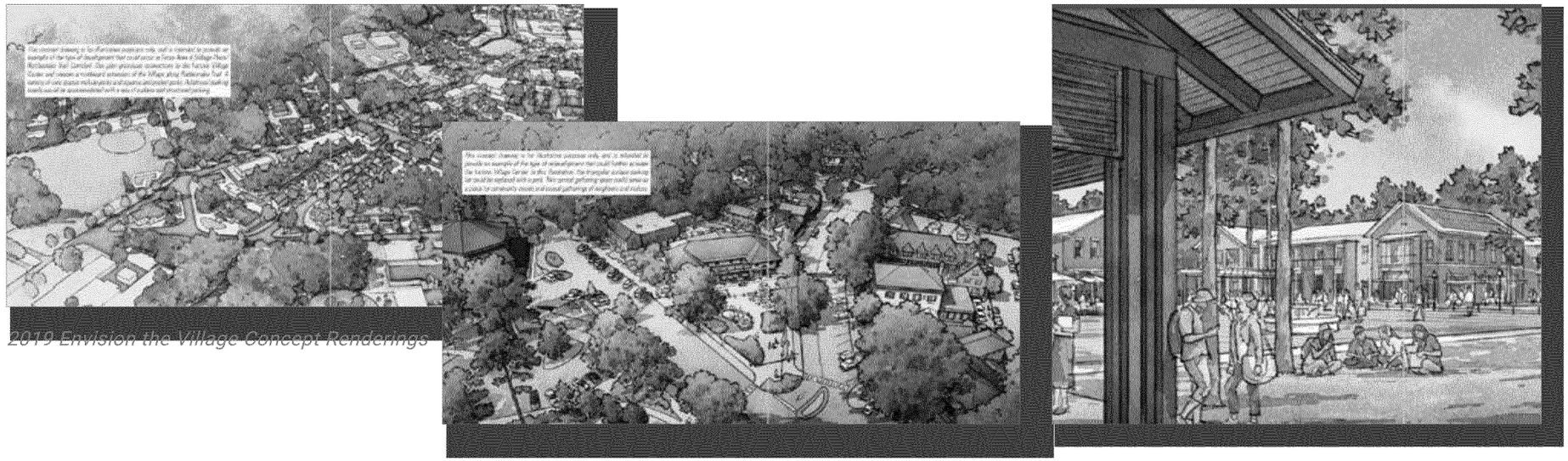
James Walter Tufts



General Plan for the Village of Pinehurst - 1895

1.4 PREVIOUS PLANS AND STUDIES

Since becoming a municipality in the 1980s, at least eight plans have been completed, either encompassing the full area of the Village, or focusing on a particular neighborhood. A summary of each relevant study can be found below.



2019 Envision the Village Concept Renderings

2020 STRATEGIC OPERATING PLAN

As the most recent previous planning effort untaken by the Village, this plan identified growth in population and increased development as the primary issues facing the Village. The plan established the following priorities and areas of focus:

1. Safeguard the community;
2. Promote high quality development and appearance;
3. Promote a thriving business community;
4. Promote transportation mobility and connectivity;
5. Protect the environment;
6. Promote active living and cultural opportunities;
7. Professionally manage a high performing organization;
8. Attract and retain an engaged workforce; and
9. Maintain a healthy financial condition.

2019 COMPREHENSIVE PLAN

The Village completed the *2019 Comprehensive Plan* as a guide to manage growth for the next 15-20 years. The planning effort included a significant level of public participation including numerous public forums and online engagement. The Plan outlined the following seven guiding principles:

1. Retain the small-town charm, scale, and character of the community to ensure a high quality of life. Celebrate and preserve the historic Village and traditions that make Pinehurst desirable and unique.
2. Balance the need to conserve land while allowing purposeful, quality development in strategic locations to meet the needs of residents, businesses, and visitors. Ensure high quality development that reflects the character of the community and maintain high quality gateways and corridors to ensure the built environment is in keeping with the character of Pinehurst.
3. Protect and enhance the quality and character of existing residential neighborhoods. Seek opportunities to offer a variety of housing types that appeal to a wide range of households and enable residents to live in Pinehurst throughout all stages of life. Ensure neighborhoods are connected to walkable destinations such as parks, open spaces, recreational facilities, and other activity centers.
4. Provide a safe, reliable and efficient transportation system that promotes and enhances mobility and connectivity between neighborhoods and destinations through a multi-modal network of complete and walkable streets, sidewalks and paths for vehicles, golf carts, pedestrians, and cyclists.
5. Support the golf, tourism and healthcare industries that make up the economic backbone of the community by encouraging entrepreneurship, supporting diverse and innovative businesses, and developing a thriving arts, culture, and entertainment market. Encourage a variety of shopping, dining, and cultural opportunities for residents and visitors alike.
6. Ensure supporting infrastructure and community facilities exist to meet the needs of existing and future Pinehurst residents, businesses, and visitors. Partner with other providers to plan for and expand infrastructure as necessary to ensure a high quality of life.
7. Preserve, conserve, and feature Pinehurst's natural resources with expanded parks, open spaces, and events that enhance the health and well-being of the community and the environment.

2015 COMPREHENSIVE BIKE PLAN

The *2015 Comprehensive Pedestrian Plan* was completed to evaluate the needs of current and future residents and visitors in the Village. The efforts included input from a Steering Committee, several Community Workshops/ Events and a Pedestrian/Bicycle Survey. The following Goals and Objectives were established:

- Increase the options for bicycling as an alternate form of transportation within the Village
- Provide attractive, yet safe, bicycling connections from Village residential areas to nearby destinations
- Promote bicycling as a healthy exercise
- Create a bicycle environment that is friendly to all users - including seniors, disabled persons and children
- Improve connections between disparate parts of the Village
- Promote bicycle safety

2015 COMPREHENSIVE PEDESTRIAN PLAN

The *2015 Comprehensive Pedestrian Plan* was completed at the same time as the *2015 Comprehensive Bike Plan* to evaluate the needs of current and future residents and visitors in the Village. The efforts included input from a Steering Committee, several Community Workshops/ Events and a Pedestrian/Bicycle Survey. The following Goals and Objectives were established:

- Increase "walkability" in the Village of Pinehurst
- Create a pedestrian network that is an important part

of the urban structure

» Promote walking as healthy exercise

» Create a pedestrian environment that is friendly to all users – including seniors, disabled persons and children.

» Improve connections between disparate parts of the Village.

2011 VILLAGE OF PINEHURST THOROUGHFARE PLAN

The *2011 Village of Pinehurst Thoroughfare Plan* was completed as an update to the original Thoroughfare Plan completed 20 years prior by the North Carolina Department of Transportation. The intent was to ensure a dynamic and strategic road network for the Village of Pinehurst for future travel and development needs. As stated in the report, the intent was to create a local consensus of the vision for Pinehurst's future transportation system. The plan included a designation of roadways as Major Thoroughfares, Minor Thoroughfares, and Collector Streets, as well as a Thoroughfare Map identifying each road classification. The plan recommended the following principles for the Village's local road improvements:

» Advocate for context sensitive design in all transportation planning and design efforts

» Continue to prefer roundabouts over signalized intersection and other traffic control devices when considering intersection improvements.

» Assure appropriate landscaping as a high priority on road projects in our jurisdiction

» Preserve the tree canopy on local and regional projects to maintain our community character

» Preserve and enhance landscaping at gateway intersections

» Maintain and enhance landscape along road corridors

» Maintain strong design controls in the transportation planning review process

» Continue to investigate methods to minimize the overall costs of future pavement maintenance

» Continue to monitor traffic speeds

» Continue efforts to minimize the number of curb cuts and other possible disruptions to traffic flow, capacity, and safety on major roads.

» Continue to plan for additional sidewalks and trails to be integrated with local streets and NCDOT projects

2010 COMPREHENSIVE LONG RANGE PLAN

The *2010 Comprehensive Long Range Plan* was a two part document including a Strategic Element and an Implementation Element. The Strategic Element guided the overall strategic direction of the Village to preserve and enhance the overall sense of place. The Implementation Element included a detailed compilation of tasks and programs to be completed. The plan outlined four thematic elements: Enhance, Preserve, Guide and Support. With the plan, the Village intended to:

» Preserve and enhance the unique character and ambience of the entire community, especially the historic Village Center

» Enhance the quality of life for present and future residents

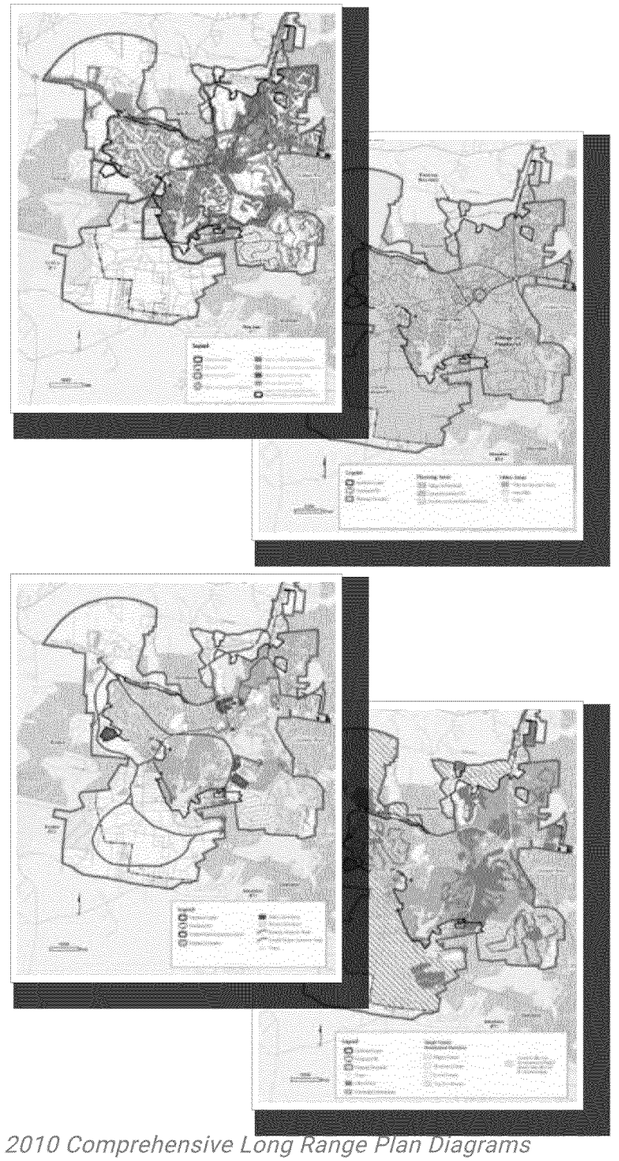
» Guide growth or change in ways that complement the unique character and ambience of the community

» Address community needs in the most efficient and cost-effective manner

» Maintain the legacy of Pinehurst for future residents and visitors to enjoy.

2008 NEW CORE MASTER PLAN

The *2008 New Core Master Plan* focused on an area of approximately 19 acres in the Village Center as an opportunity for redevelopment. The study included participation of a Steering Committee as well as extensive public participation, including a three-day charrette. The Key Concepts and Principles for the Plan included:



2010 Comprehensive Long Range Plan Diagrams

» Continuation of the scale, design, architectural character and "walkability" of the Village Center

» A mix of uses – retail, office, residential and open spaces

» Addition of roads and sidewalks to provide access to the interior of the plan area and to continue the Village's interconnecting street pattern

» Clustering retail uses on the southern portion of the plan area, where they would be in close proximity to the Village Center and enhance its strength as a specialty retail location

» Adding a variety of residential uses – cluster homes including single-family residential, townhouses, live-work units, and other market-supported residential forms

» Adaptive reuse and/or relocation of historic structures

» Pedestrian emphasis

» Providing at least as much parking as needed for development in the New Core

1994 NATIONAL HISTORIC LANDMARK NOMINATION

The *1994 National Historic Landmark Nomination* highlights the history and making of Pinehurst by Frederick Law Olmsted, Warren H. Manning, and James Tufts. The document highlights the intentions of the Olmsted plan to ensure the "overlay of an evergreen landscape on a curvilinear pattern of Village streets" as the heart of the design for the recreational resort and details many aspects of the original plan and development.

A companion to the 1994 National Historic Landmark Nomination was the creation of the Village of Pinehurst Historic District Standards and Guidelines, created in 2006 and updated through September of 2013.

1.5 PDO ASSESSMENT SUMMARY

The development ordinance for the Village, known as the *Pinehurst Development Ordinance (PDO),* includes regulations for all development (whether new, or modifications to existing, development) and became effective October 2014.

As part of the analysis of the Small Area Plan (SAP) Existing Conditions, the consultant team completed a comprehensive review of the PDO, looking for items of concern, compiled in this summary, that may inhibit achieving the envisioned future of Village Place and Pinehurst South.

The PDO regulations were adopted in accordance with the then current, *2010 Comprehensive Long Range Village Plan,* as well as all other then current Village plans and policies, in order to accomplish the following goals:

- Preserve and enhance the unique character and ambience of the entire community, especially the historic Village Center;
- Enhance the quality of life for present and future residents;
- Guide growth or change in ways that complement the unique character and ambience of the community
- Address community needs in the most efficient and cost-effective manner; and
- Maintain the legacy of Pinehurst for future residents and visitors to enjoy.

While these goals remain valid, since the adoption of the PDO, several additional planning efforts have been undertaken, including the *2019 Comprehensive Plan*. Along with many other key strategies and recommendations, the new comprehensive plan called for a full update to the PDO, specifically to include corridor standards, conservation subdivision standards, and character-based zoning concepts. The Small Area Plan (SAP) effort, and the following summary, builds off of this *2019 Comprehensive Plan* key recommendation.

For the SAP, the consultant team focused on the following sections of the PDO.

SECTION 8.2 GENERAL USE ZONING DISTRICTS

The General Use Zoning Districts section of the PDO provides land use regulations for nineteen (19) districts allowing for a variety of uses appropriate to the character of each individual district. The following items were noted as concerns for this section, relative to the SAP effort:

- Section 8.2.5 defines R-10, R-8 and R-5 as High-Density Residential Zones, however, high-density uses (such as Multi-family and Townhouse Dwellings) are not permitted by the Section 8.5 Table of Permitted Uses. Only Single-Family Dwellings are permitted and are not considered a high-density type.
- In addition to the specific item listed above, generally, the Euclidian or used-based zoning districts are counter to the recommendation in the *2019 Comprehensive Plan* for character-based zoning. The Form-Based Codes (FBC), to be developed as part of this SAP effort, in contrast, align with the comprehensive plan's recommendation and will shift the focus from use-based zoning to building form and character. The FBC are intended to supplant the current PDO for Village Pace and Pinehurst South areas only.

SECTION 8.5 & 8.6 TABLE OF PERMITTED USES & SPECIAL USES

Section 8.5 of the PDO contains a list of uses which may be permitted in one or more of the various General Use Zoning Districts established by the Ordinance. While Section 8.6 defines the Special Requirements as called for in Section 8.5. The following items were noted as concerns for these sections, relative to the SAP effort:

- There are several terms used in the Table of Permitted Uses & Special Uses which are inconsistent or in conflict with Section 10.2 Definitions. These terms may be limiting or unintentionally promote certain uses in areas that are not intended by the PDO. In particular, the following items were noted:
  - The terms "Industry, Heavy" and "Heavy" while used in Section 10.2, are not included in the Section 8.5. It is unclear where uses in this category would be classified in Section 8.5.
  - In regard to Senior Housing, Section 8.5 lists the categories "Residential Care Facilities (More than 6 Residents)" and "Child/Adult Daycare Center". These terms do not address the additional uses listed in Section 10.2 as defined under "Nursing Home: Adult Care Home , Assisted Living Residence, Continuing Care Retirement Community, and Hospice". Therefore, it is unclear whether these additional uses were intentionally omitted and, if so, why.
  - Section 8.5 does not include "Office", as defined in Section 10.2 as "general business office, government offices, insurance offices, law office and real estate and management offices". The specificity of the uses listed in the table may be problematic for certain types of office that may be desirable.
  - The term "Dwelling - Mixed Use" is used in Section 8.5, however, it is unclear whether the term "Live-Work Unit" (as defined in Section 10.2) is included as a Dwelling-Mixed Use. This may potentially limit the ability for development of Live-Work units.
- SR-3 Dwelling, Multi-Family:
  - The minimum size for a multi-family dwelling is one thousand five hundred (1,500) heated square feet. This size is well outside the typical unit size and may preclude new development from occurring and/or providing a range of unit sizes to meet market demand.

SECTIONS 9.1 & 9.2 TABLE OF DIMENSIONAL REQUIREMENTS

Section 9.1 of the PDO defines the minimum design and development standards for all buildings, sites, and infrastructure. While Section 9.2 defines the dimensional requirements for all uses and structures in the General Use Zoning Districts.

The following items were noted as concerns for these sections, relative to the SAP effort:

- Minimum Front Yard Setback: The minimum front yard setback for the majority of districts is greater than or equal to 20'. This may be problematic for smaller infill lots and/or to allow for a street frontage that relates to a pedestrian scale where building frontage is desirable and helps to create an engaging streetscape.
- The Minimum Rear Yard Setback in most districts is a minimum of 20' or more. This may preclude the redevelopment of small infill lots or lots that do not require on-lot parking and/or are rear-loaded.
- As written, the principal building as well as other structures including decks, landings, terraces, porches, and patios (with minimal exclusions) shall not be located within setbacks (*see 9.1.E.2*). This standard may unintentionally eliminate desirable building elements (such as deep front porches and bay windows).
- Building Height: While "Dwelling - Multifamily" is a permitted use in the VCP and VR districts, the building height is limited to 35', thereby limiting these buildings to 2 stories with a sloped roof (unless placed in an off-hill site condition or designed with a flat roof). As noted under Section 10.2 below, Building Height is measured to the highest point of the roofline, which precludes a 3-story building with a properly sloped roof and may unintentionally force a flat roof or a truncated sloped roof with a well.

SECTION 9.14 DESIGN STANDARDS FOR SINGLE FAMILY DWELLINGS & 9.3 VILLAGE DISTRICT DESIGN STANDARDS

Section 9.14 of the PDO defines design standards for Single-Family Dwelling development to ensure it is compatible with existing development and consistent with its site and surroundings. While Section 9.3 defines

design standards for the Village Districts to promote development that is functionally and structurally compatible with the existing Village Center and pedestrian area.

The following items were noted as concerns for these sections, relative to the SAP effort:

- While the landscape design standards in Section 9.14 go into some detail and specify minimum quantities, the Exterior Building Materials portion is very limited (perhaps due to the restrictions placed on one- and two-family dwelling design standards by the state). The majority of this section is focused on process rather than design standards.
- The Village District Design Standards are applicable only to the following districts: Village Mixed Use, Village Cottage Professional, and Village Residential. Therefore, the following residential districts, R-5, R-8, R-10, R-15, R-20, R-30, R-210, and R-MF, as well as Office Professional (OP) district do not have design standards, limiting the design oversight of these areas.
- Certain standards are vague or impractical; e.g., shake is limited to 15% per block, requiring the architect or builder to calculate every facade on the block in lieu of their proposed building only and allowing the first buildings to consume a full block's allotment of shake; facade lighting standards address glare, but do not address light trespass, full cut-off fixtures to protect the night sky, light temperature, or energy-conserving lamps; public spaces shall be incorporated in the Village Mixed-Use District, but no other districts and there is mention of minimum size, frequency, appropriate types, amenities, and similar.

SECTION 10.2 DEFINITIONS

Section 10.2 of the PDO contains definitions of words used within the ordinance. The following items of concern were noted for this section:

- Building Height is defined as "the vertical distance measured from the average elevation of the proposed finished grade at the front of the building to the highest point of the roof". The preferred method requires building height to be measured to the eave or to the midpoint of the roof, allowing properly pitched roof slopes and tall floor-to-ceiling heights reflective of the Village's architectural character.
- Live-Work Units are defined as "variations of either the detached house building type or the townhome building type". It is recommended to also include Dwelling - Mixed Use to coordinate with the Table of Permitted Uses & Special Uses in Section 8.6.
- The use of the phrase "detached house" should match "Dwelling, Single Family".
- "General Retail" is a term used in Section 8.5, however is not defined in Section 10.2.

To see current zoning districts and permitted uses that exist within the Small Area Plan boundaries, see pages 22-23 of this document.

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2.0 EXISTING CONDITIONS

2.1 OVERVIEW

2.2 EXISTING CONDITIONS

2.3 MARKET ANALYSIS SUMMARY

Existing Conditions

Located south of the Village Center along NC-5, Pinehurst South encompasses approximately 290 acres with almost 47% of the area undeveloped. A portion of this area is in the unincorporated area of the Village of Pinehurst known as the Village's Extraterritorial Zoning Jurisdiction (ETJ). Some of the development in this study area is older, more auto-centric, and may be considered out of character with the Village.

The *2019 Comprehensive Plan* recommends redevelopment with office, medical, life science, and research facilities supported with small-scale retail services and residential uses. Given the availability of undeveloped land, Pinehurst South offers the unique opportunity to expand the character of Pinehurst and create a new gateway for the Village to the south.

To ensure the small area plans support the Village's vision, the design team conducted a thorough assessment and inventory of existing conditions to understand the historic, cultural, environmental, social, market, and economic assets of Pinehurst.

The plan builds on the strengths of the existing conditions; upholds the planning principles of the original Tufts, Olmsted, and Manning vision and plan; and extends the Village's small-town scale, architectural character, and walkability outward rather than allowing auto-oriented commercial development to creep inward over time.

This section includes the photographs, diagrams, and conclusions of this documentation and analysis phase, which was then used, along with stakeholder input, as the groundwork for the concept planning phase (Phase 2).

The Existing Conditions and Analysis diagrams include:

- Existing Illustrative Plan
- Figure Ground Plan Diagram
- Historic District Plan Diagram
- Street Network Plan Diagram
- Posted Speed and Traffic Control Plan Diagram
- Land Use Plan Diagram
- Zoning Plan Diagram
- Topography Plan Diagram
- Open Space + Trails + Sidewalk Plan Diagram
- Market Analysis Summary

The following observations were made as part of the Existing Conditions study:

- Forest cover is abundant in Pinehurst South; however, the area lacks meaningful and organized open spaces for the community's use.
- There is a grouping of existing and planned commercial and civic uses in the area between Monticello Drive and Blake Boulevard, including the Post Office, Pinehurst Fire Station No. 2, American Legion, the soon-to-be-relocated Boys & Girls Club, and a new headquarters building for NAHB.
- Multi-family and Single-Family Detached (SFD) residential are the primary uses west of NC-5. This area is poorly connected for pedestrian, bicycle, golf cart, and vehicle circulation as well as to other surrounding streets and trails.
- Trotters Hill Office Park is an enclave of separate professional office buildings. Several lots have been developed, including several in recent years, particularly those adjacent to and with visibility from NC-5. With the recent construction, few undeveloped parcels within the office park remian.
- There is a range of residential architecture in Pinehurst South, some of which is in keeping with the historic character of Pinehurst and some that appears quite out of place or in disrepair.
- Similarly, there is a range of commercial architecture in Pinehurst South, some of which is in keeping with the historic character of Pinehurst and some that appears quite out of place as ubiquitous, auto-centric development.
- Overall, the area remains largely undeveloped and, thus, presents an opportunity for development that responds to the market demand but additionally upholds the Village's character.



Monticello Drive
Source: Design Collective



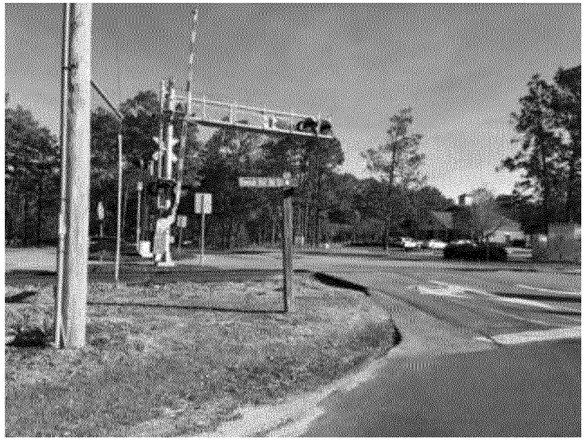
Blake Blvd & NC-5
Source: Design Collective



Multi-Family Residential - Abingdon Square
Source: Design Collective



United States Post Office - Blake Blvd
Credit: Google



Blake Blvd Railroad Crossing
Source: Design Collective



Commercial - Pinehurst Dental/Trotters Hill Office Park
Credit: Google



Commercial - Trotters Hill Office Park
Source: Design Collective



Commercial - Pinehurst Coins
Credit: Google Images



Flooring Gallery
Credit: Google

Illustrative Site Plan

The Existing Illustrative Plan depicts the development and open space patterns that exist in the study area. A 1/4-mile walking radius (5-minute walk) is indicated on the plan for reference.

KEY

- SMALL AREA PLAN (SAP) BOUNDARY
- VILLAGE OF PINEHURST
- BUILDING FOOTPRINTS
- PARKS/ OPEN SPACE

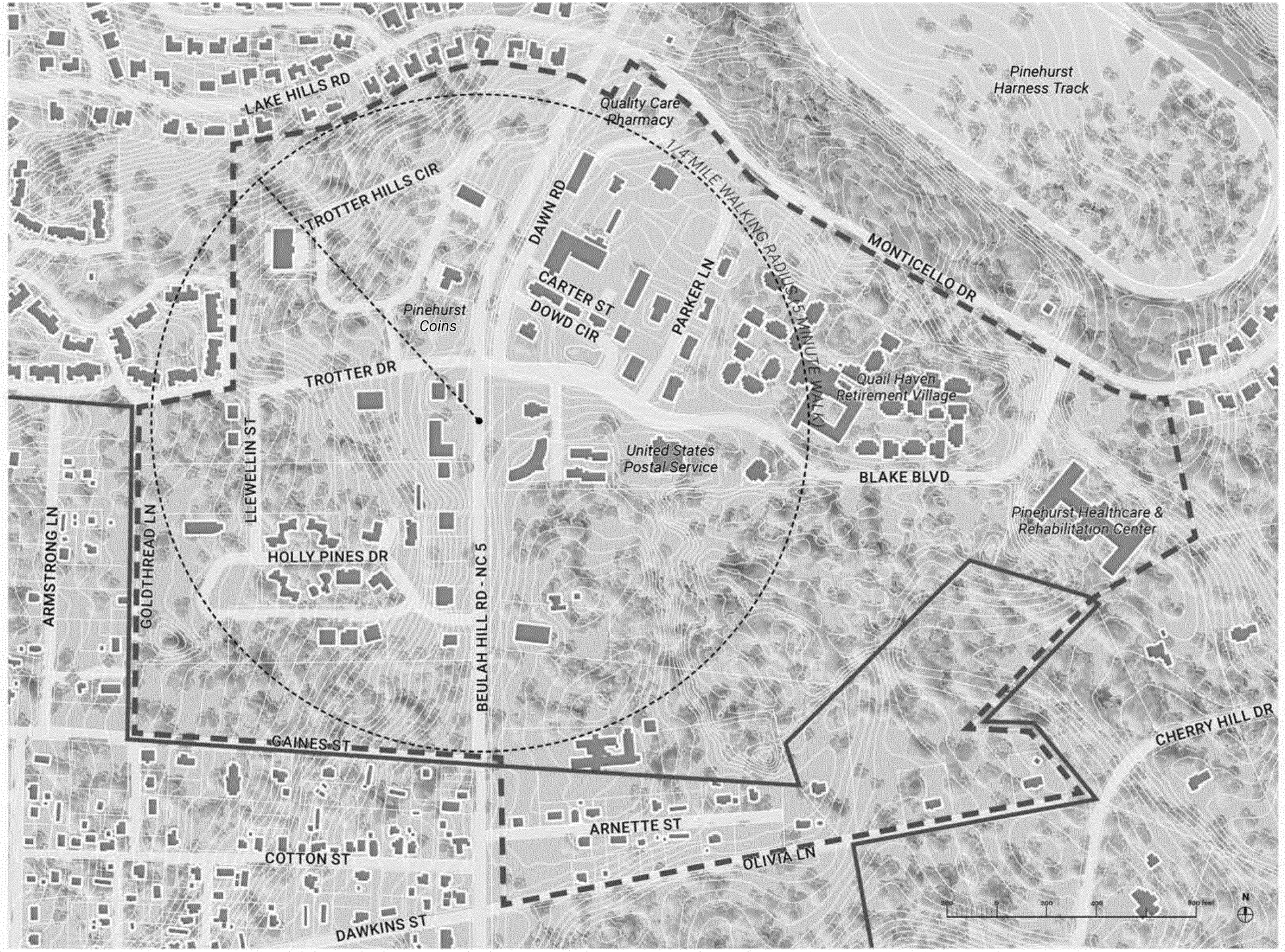
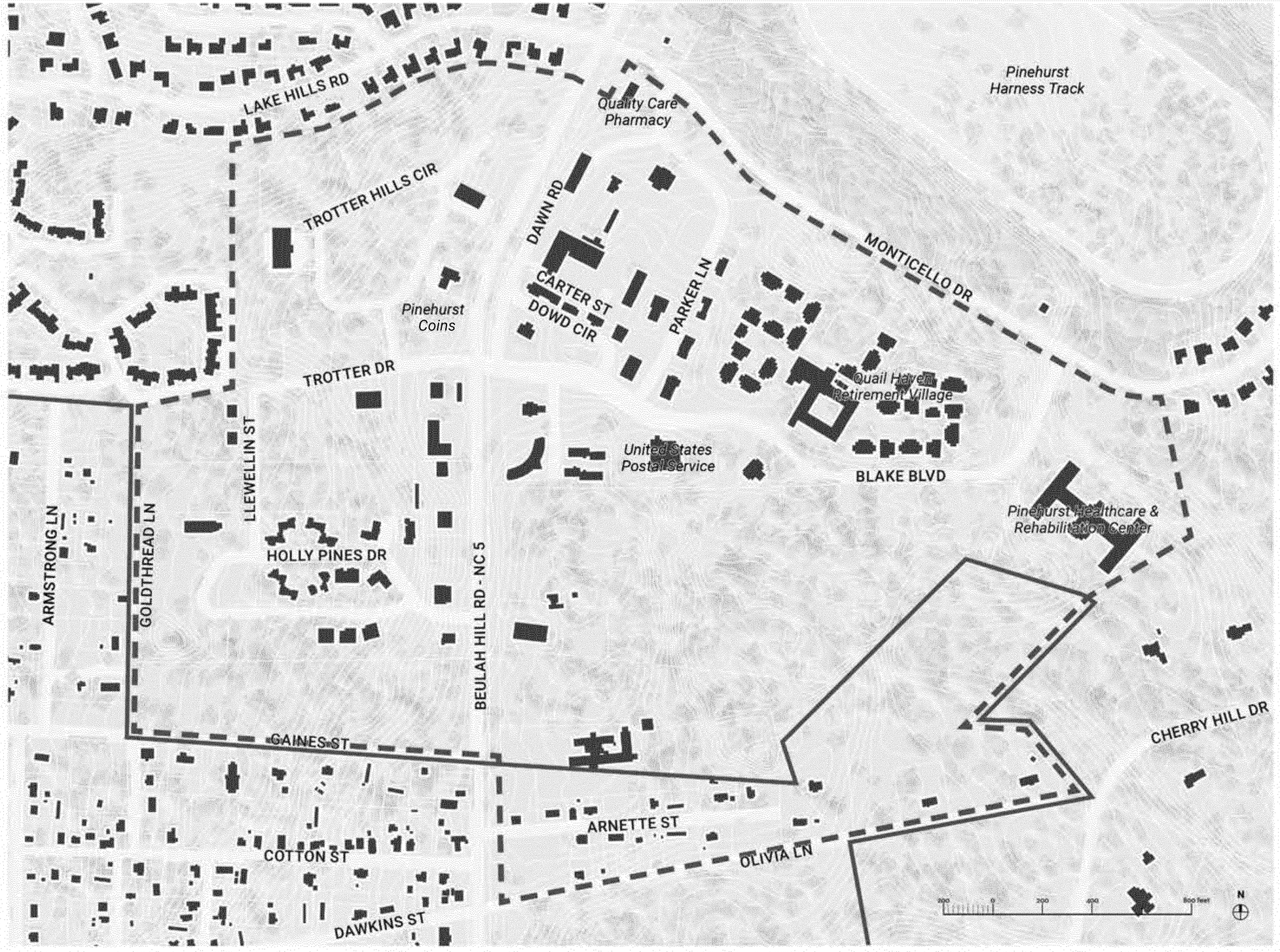


Figure Ground

The Existing Figure Ground plan shows the relationship of built and unbuilt space in Pinehurst South.The development patterns in the study area are characterized by commercial uses accessed off of Beulah Hill Road - NC-5 with a mix of residential building types interspersed to the west and east. Undeveloped parcels exist in Trotter Hills, a planned office development located in the northwest corner of the study area. The development consists of 17 parcels with approximately 1/3 of the lots either developed, permitted, or under review. Larger underutilized land with no projected development exists in the southeast corner of the study area.

KEY

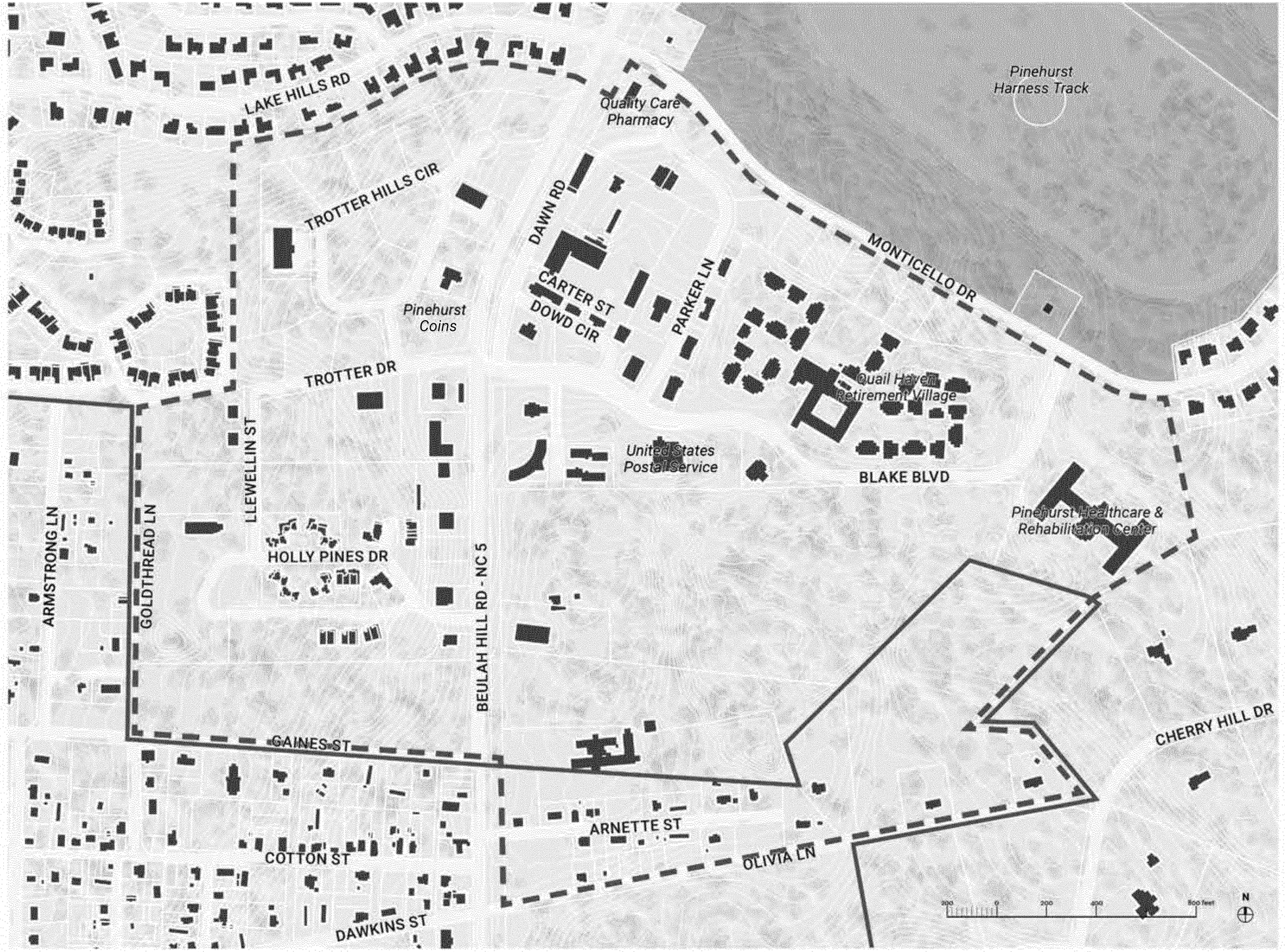
- SMALL AREA PLAN (SAP) BOUNDARY
- VILLAGE OF PINEHURST
- BUILDING FOOTPRINTS



Historic District

The Historic District is comprised of properties that fall within the National Historic Landmark district or that were surveyed and identified as important fixtures within the community. These properties are subject to additional review by the Historic Preservation Commission and the Historic District Standards to ensure the history and charm of the Village of Pinehurst is preserved.

No portion of the Historic District expands into the Pinehurst South study area, however, the Pinehurst Harness Track lies directly to the north and is within the District.



KEY

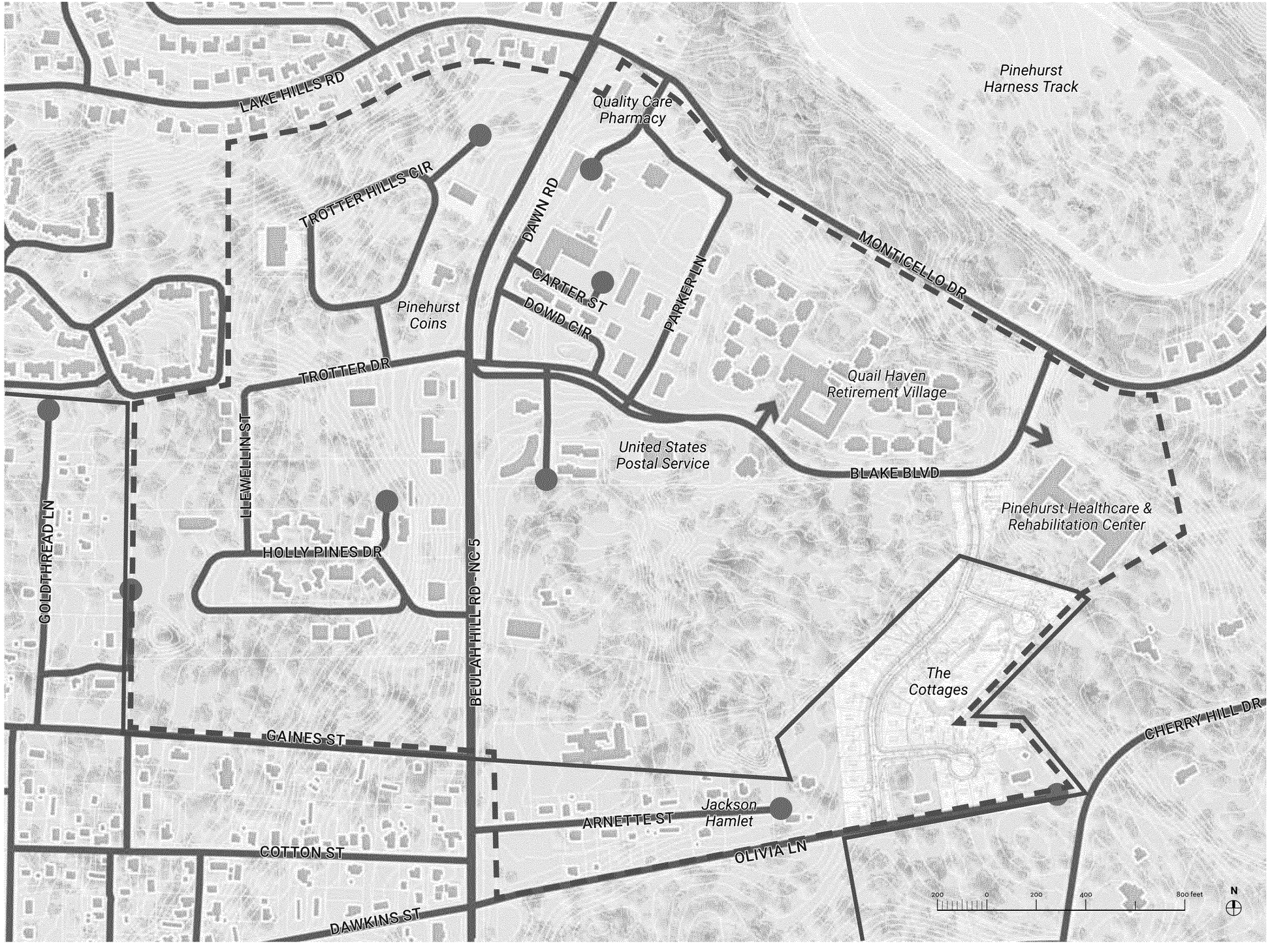
- SMALL AREA PLAN (SAP) BOUNDARY
- VILLAGE OF PINEHURST
- BUILDING FOOTPRINTS
- HISTORIC DISTRICT OVERLAY

Street Network

The Pinehurst South study area spans Beulah Hill Road - NC-5, a major connector street that provides direct access to the Village Center to the north and US 501 to the south. Neighborhood streets are organic and disconnected with many dead-end conditions throughout the study area.

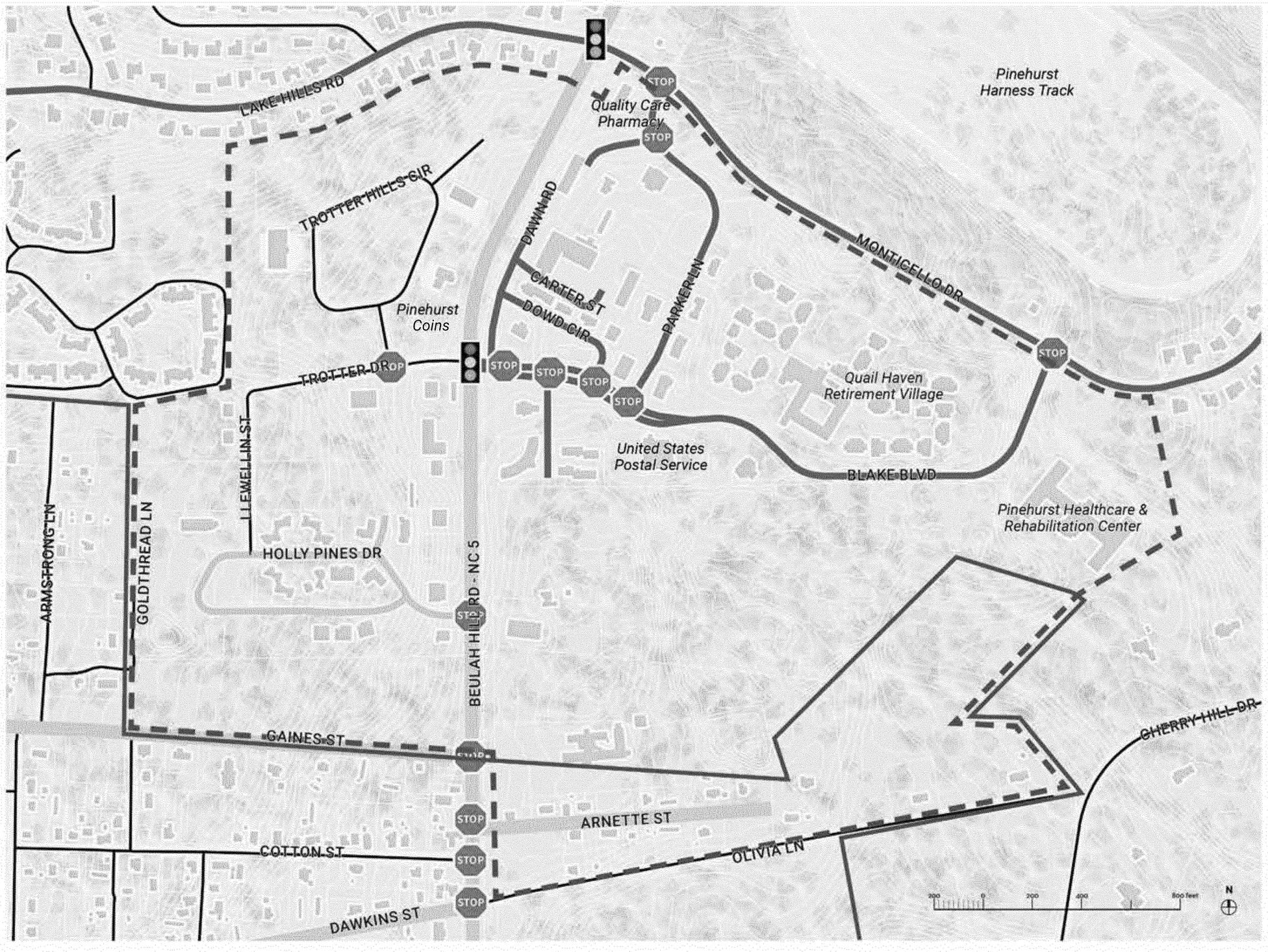
KEY

- VILLAGE OF PINEHURST
- SMALL AREA PLAN BOUNDARY
- EXISTING ROADS
- EXISTING DEAD END



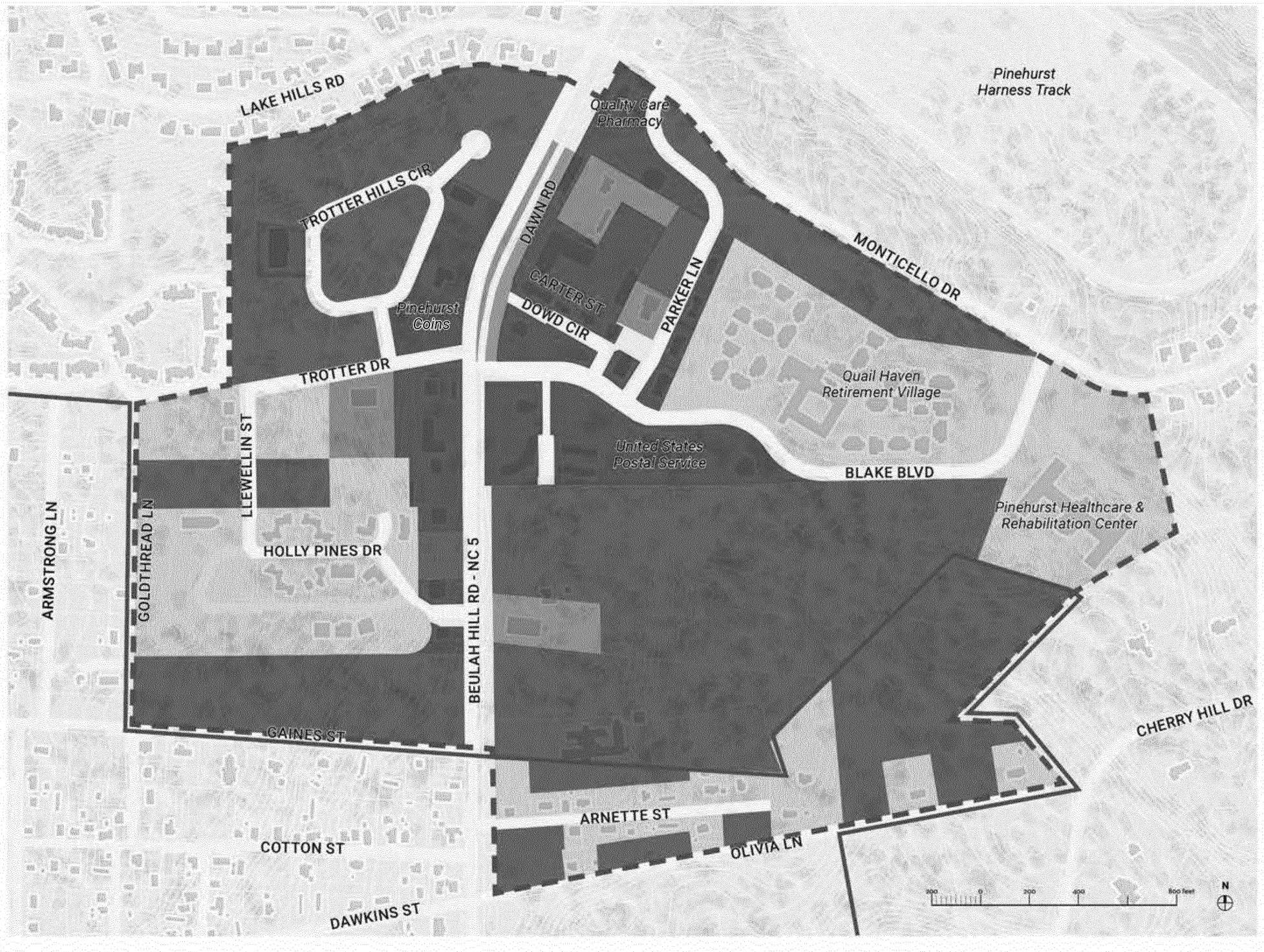
Posted Speed and Traffic Control

The streets within the study area boundary have a range of posted speeds. Beulah Hill Road - NC-5 is 35 mph. A majority of the neighborhood streets are 25 mph with the exception of Holly Pines Drive which is 10 mph. Stop signs are located at all Beulah Hill Road - NC 5, Blake Boulevard, and Monticello Drive intersections. For added control and safety, traffic signals have been placed along Beulah Hill Road - NC 5 at the intersections of Blake Blvd and Monticello Drive.



Land Use

The study area includes a mix of land uses. A majority of the commercial uses are centered along Beulah Hill Road - NC-5 with residential uses and large vacant properties surrounding the commercial core. A large percentage of the study area is vacant or underutilized.



KEY

- SMALL AREA PLAN (SAP) BOUNDARY
- VILLAGE OF PINEHURST
- CIVIC
- RETAIL
- OFFICE
- RESIDENTIAL
- INDUSTRIAL
- VACANT
- PARKS/ OPEN SPACE

Zoning

A majority of the eastern half of the study area is zoned Neighborhood Commercial (NC) with a mix of Office and Professional (OP) and Residential (R5) zones. The western half of the study area is Office and Professional (OP) to the north with Residential Multifamily (RMF) to the south.





Existing Zoning and Permitted Uses

The following zoning districts exist within the Pinehurst South Small Area Plan boundary. For a full matrix of all zoning districts and permitted land uses, reference Section 8.5 of the *Pinehurst Development Ordinance* (PDO).

KEY

- ✓ PERMITTED USES
- SR SPECIAL REQUIREMENTS, SEE SECTION 8.6
- SU SPECIAL USE PERMIT REQUIRED, SEE SECTION 4.5
- ✗ PROHIBITED USES

		USES																	
		DWELLING - SINGLE FAMILY	DWELLING - TWO FAMILY	DWELLING - MULTIFAMILY	DWELLING - TOWNHOUSE/ CLUSTERED DWELLINGS	DWELLING - MIXED USE	BED AND BREAKFAST HOMES	HOTEL	MEDICAL CLINIC	PERSONAL SERVICES	PROFESSIONAL SERVICES	GENERAL RETAIL	RESTAURANT	CIVIC/CULTURAL FACILITIES	RESIDENTIAL CARE FACILITIES (> 6 RESIDENTS)	PARKING STRUCTURE	Maximum Building Height	NOTES
	R5 - RESIDENTIAL	✓	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	SU	✗	35'	*Intended principal use of land is high-density residential uses, intended to discourage any use detrimental to the residential nature.*
	RMF - RESIDENTIAL MULTIFAMILY	✓	✓	SR	SR	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	35'	*Intended principal use of land is multi-family and/or single family dwellings, intended to discourage any use that would be detrimental to the residential nature.*
	NC - NEIGHBORHOOD COMMERCIAL	✗	✗	✗	✗	SR	✗	✗	✓	✓	✓	SR	SR	✓	✓	✗	35'	*Intended principal use of land is small scale commercial, retail, office and service to residential districts*
	OP - OFFICE & PROFESSIONAL	✗	✗	✗	✗	SR	✗	✓	✓	✓	✓	✗	SU	✗	✓	SR	35'	*Intended to provide for limited office and retail development, as a transition between business districts and residential land uses*

Topography

The topography of the study area is characterized by a natural ridge line along Beulah Hill Road - NC-5. The study area sits at a plateau along the eastern side with grades sloping downward towards Pinehurst Lake.

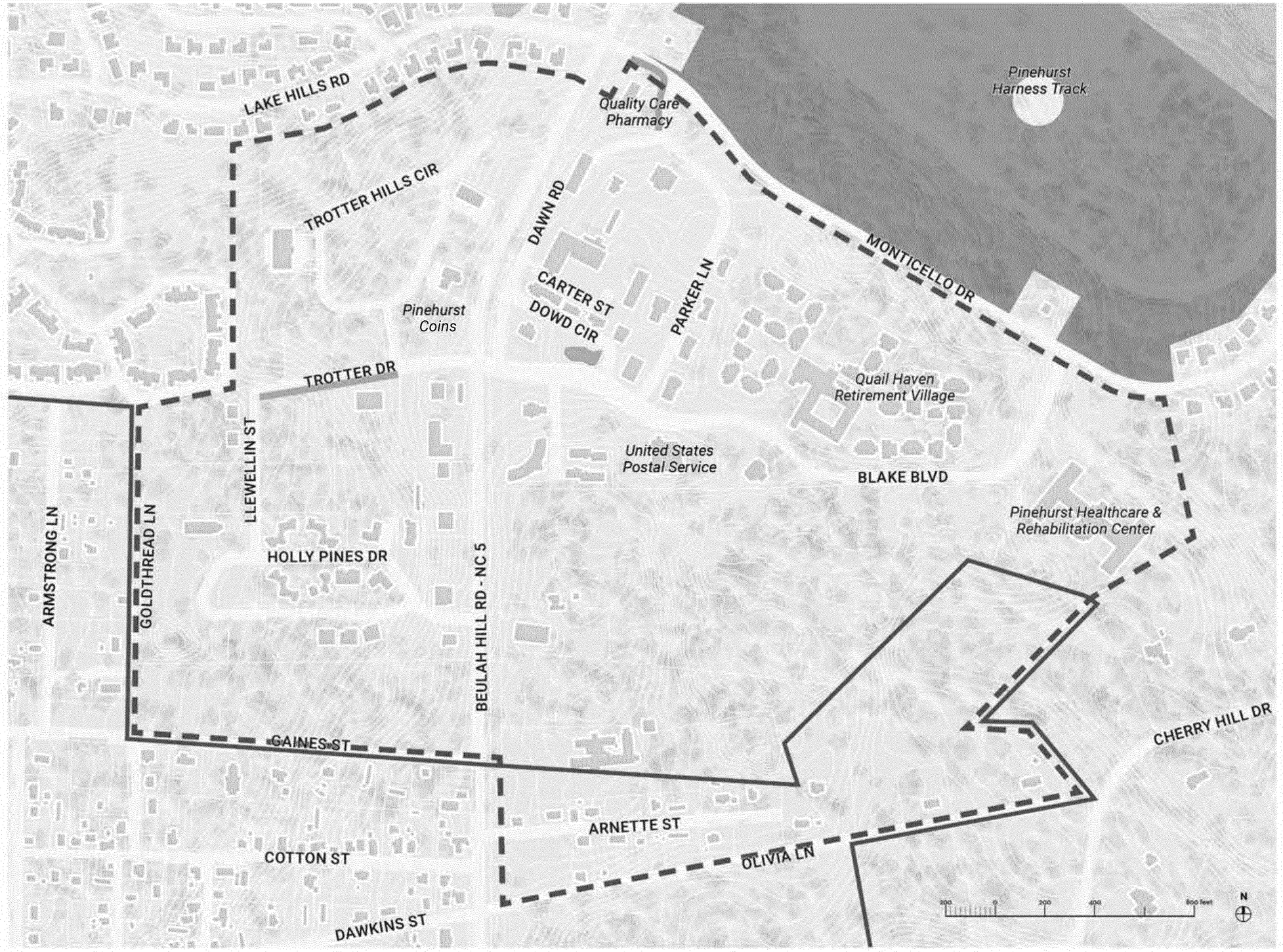


KEY

- SMALL AREA PLAN (SAP) BOUNDARY
- VILLAGE OF PINEHURST
- +550
- +450

Open Space + Trails + Sidewalks

The study area contains no dedicated public open space or trails within its boundary. There are only two segments of sidewalks that currently exist on parker Lane and a portion of Trotter Drive. Just north of the study area is the Pinehurst Harness Track, one of the oldest continuously operating equine sports facilities in the state.



KEY

- SMALL AREA PLAN (SAP) BOUNDARY
- VILLAGE OF PINEHURST
- GREENWAY TRAILS
- WALKWAY TRAILS
- SIDEWALKS
- PARKS/ OPEN SPACE

2.3 MARKET ANALYSIS SUMMARY

Background and Objectives

A Market Analysis report was prepared by Duggal Real Estate Advisors, LLC (DREA); the following pages provide a summary; the full report can be found on the project website: https://engage.vopnc.org/smallareaplans. The data was collected in November and December 2020 and January 2021.

The market analysis is one step in the process to determine the feasibility of land uses within the Village of Pinehurst and the plan areas. It ascertains the quantitative and qualitative aspects of demand for land uses that might be appropriate for future development in the plan areas and quantifies the potential scale and timing of these uses.

Also known as the Highway 5 Commercial Area, Pinehurst South is an approximate 290 acre limited growth and redevelopment area on the Village's south side containing approximately 145 parcels.

Summary of Market Opportunity

For the market analysis, DREA examined six different land uses: for-sale residential, for-rent residential, retail, office, hospitality, and golf. The following is a summary of the opportunity for each of the land uses in the Pinehurst South plan area.

The overall market opportunity takes into account the current and projected future market conditions, future demand potential, and the suitability for the land use within the Village.

Summary of Demand

For each of the land uses, DREA completed a demand model to understand the future potential of the land use within the Village or Moore County, depending on the land use. To determine how much of each land use would likely locate within the plan areas, it was necessary to consider where else within the Village the land use could be located. For example, if there is demand for one rental project every three to eight years within the Village, it cannot be located in both planning areas, but in reality, it could be located in either one or another location in the Village, making it difficult to assign demand.

For many land uses, there has been and will be more demand for the product type within the Village than the amount of supply that has been or will be available (i.e., more houses would likely sell if they were available).

Summary of Demand for Land Uses within Plan Areas

DREA then considered how much of the demand could be located within the plan areas if the area was zoned for it, landowners were interested in selling, and developers would build it. While the market analysis quantifies realistic development opportunities, actual land use allocation is guided by planning exercises, site constraints, the desired vision, and stakeholder input, in balance with market demand.

The potential for most of the land uses is present in both plan areas. Although there is some flexibility in these numbers as stated before, DREA put together guidelines based upon the market to help the planning team understand the magnitude of demand in each of the plan areas. Below is the demand summary for Pinehurst South.

For-Sale Residential

- Likely a stand-alone residential community as opposed to mixed with other product.
- Given land availability, could have 1-2 projects. Each would be 30-50 units.
- However, the demand for this product is deep, and the planning area can support as much for-sale product as desired.
- Could be either single-family detached or attached product.
- Pricing would vary based upon product type and positioning, but would likely be in the range of $250,000 to $450,000.

For-Rent Residential

- Could be either a stand-alone larger community (typically larger, 150-200 units) or integrated into a mixed-use area.
- Integrated into a mixed-use area, the apartments would still likely be horizontal mixed-use (e.g. the apartments are next to the retail and office, not above). This would likely be a smaller project (80-120 units).
- Rents would be similar to the newest apartments at the time of construction. At this point, the newest apartments in the market are The Greens at approximately $1.35/SF. At an average size of approximately 1,000 square feet, that would equate to a rent of approximately $1,350 per month.

Retail

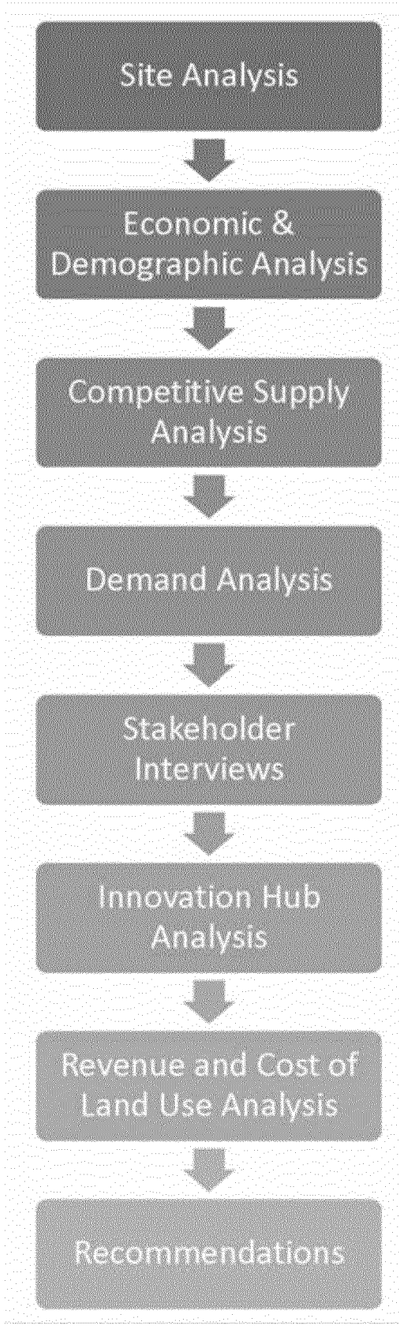
- Any retail would prefer to be located and accessed off of NC-5. If a project were created on the east side of NC-5, it would still be important to have NC-5 visibility.
- Could be a stand-alone shopping center on the west side of NC-5. This would depend on having an anchor within the project such as a grocery store or drug store. The size of the center would depend on what type of anchor, ranging from 50,000-80,000 SF in size total. This would likely not materialize for some time as the area continues to develop and mature.
- There is also demand for retail on the east side of NC-5. Due to access issues, it would be small-scale, and just to support local businesses and residents. There would likely be less than 10,000 SF total.
- If there was a shopping center on the west side of NC-5, the retail on the east side would be more limited, and vice versa.
- Any retail located within Pinehurst South would be locally serving.
- The maximum amount of retail in the area is likely to be 80,000 SF with a grocery store, and less than 40,000 SF without a grocery store at build-out.
- Rents would need to be $24-$30/SF to support new construction

Office

- Office could either be like the product available at Turnberry (small format, 1-2 story) or integrated into a mixed-use center.
- Although there is not a lot of office demand annually, given the limited amount of office land available in other areas, this would be an appropriate location to save land for future office use.
- Even at 2,000 SF of office per year, in 50 years, the total amount would be 100,000 SF. Tenants and owner-occupied space would be a collection of medical, locally-serving professional services, and potentially related to the USGA.
- Rents for office would be in the $18-$22/SF range.
- Part of the area could be a modified Innovation Hub – meaning it could be planned to attract and facilitate companies and technologies related to golf, but be willing to accept other industries and users as well.

Hospitality

- The planning area could support a hotel if it were part of a mixed-use area. If there were enough businesses, it could support the workers in the area. Otherwise, it would likely support tourists. Type of hotel depends on place creation.
- A new hotel would likely have around 100 rooms.



Overall, Pinehurst South is best suited for residential and office uses. Hospitality could be an option as well. Large-scale retail would be challenging given the access issues, but locally-serving retail would be viable.

Strengths

- Land availability
- Direct access to Pinehurst Resort via NC 5
- New development in area
- Strong businesses in area (such as Quail Haven Retirement Village)

Weaknesses

- No common theme to buildings
- Unrelated land uses
- Traffic issues

Opportunities

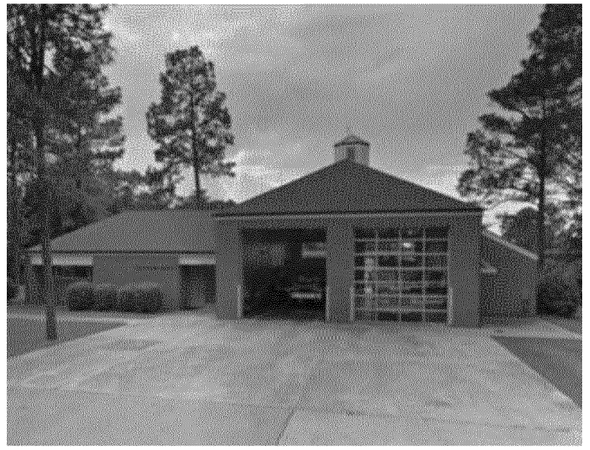
- Capitalize on growth along NC 5
- Concentration of public and semi-public services (post office, fire station, VA services)
- Create a distinct identity for area
- Build off of USGA
- Infill development

Threats/Challenges

- RR crossings & limited access
- Significant amount of vacant land south of the study area along NC Hwy 5 that could take demand potential away



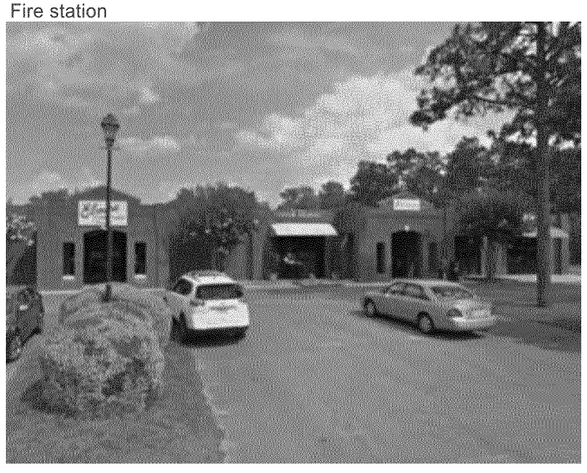
Quail Haven Retirement Village



Fire station



Abingdon Square Townhomes



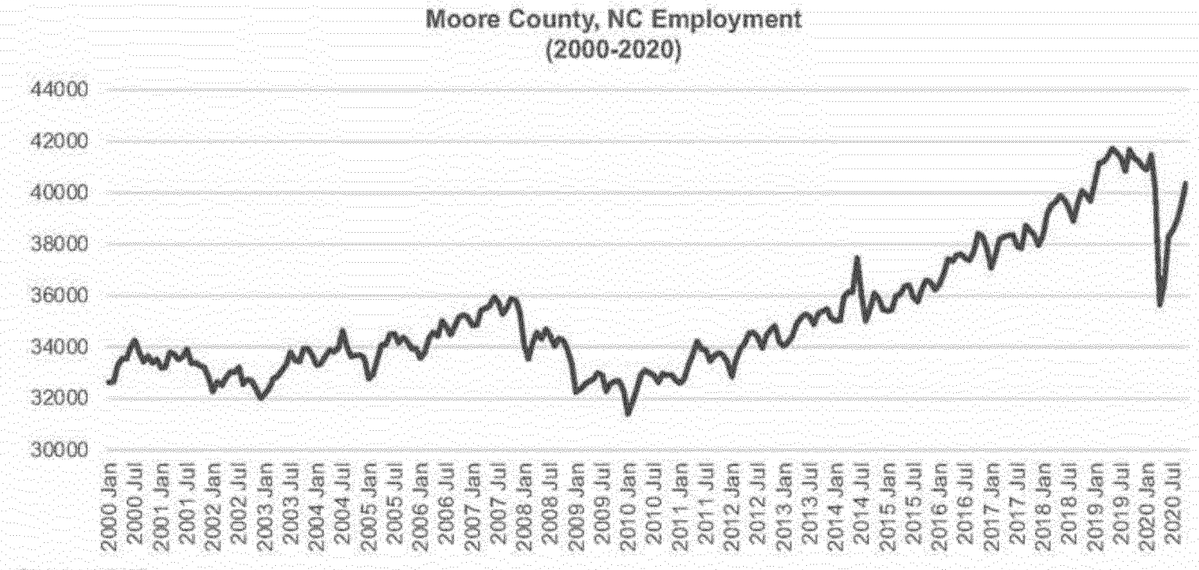
Retail



Veterans Guardian Claim Consulting

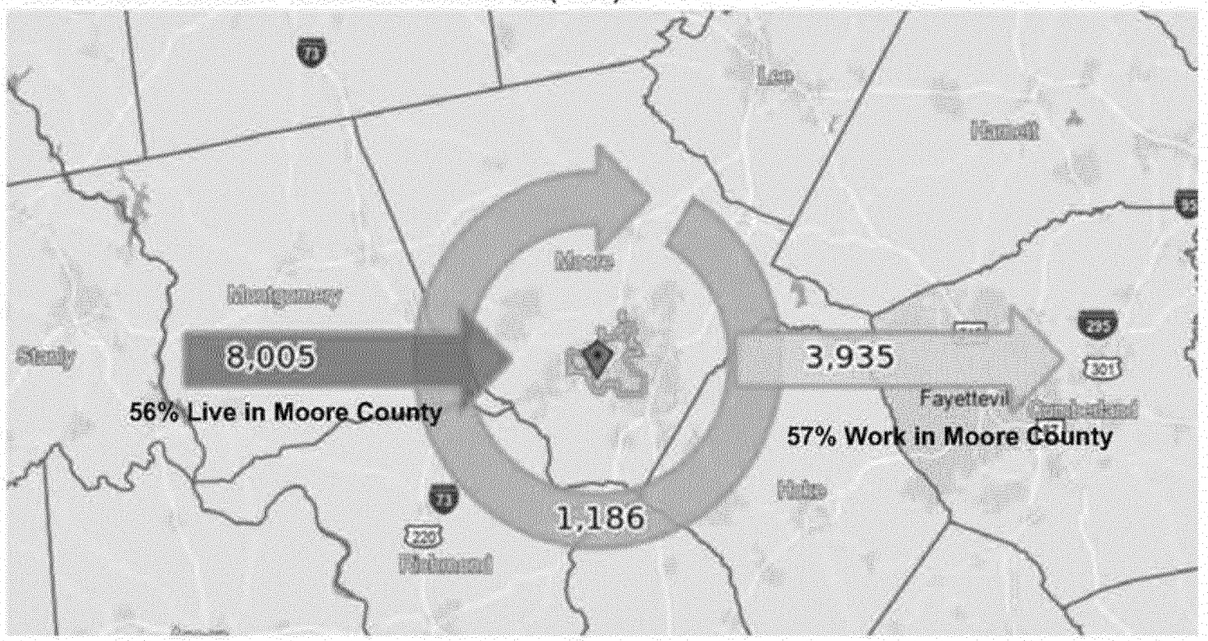


Open space along Blake Blvd.



Source: BLS

Inflow and Outflow of Workers in Pinehurst (2017)



Source Census on the Map

Jobs by Industry in Pinehurst (2020)

Industry	Businesses	%	Employees	%
Health Care and Social Services	575	54%	5,880	52%
Accommodation and Food Services	42	4%	2,839	25%
Other Services - Repair, Personal Care, Laundry, Religious, etc.	69	6%	434	4%
Professional, Scientific, and Technical Services	58	5%	396	3%
Arts, Sports, Entertainment, and Recreation	23	2%	358	3%
Retail: Home, Food, Automobiles, Personal Care	35	3%	262	2%
Education	11	1%	257	2%
Real Estate and Rentals	47	4%	234	2%
Public Administration	12	1%	173	2%
Banking, Finance and Insurance	56	5%	145	1%
Construction	25	2%	89	1%
Information	12	1%	85	1%
Other	108	10%	248	2%
Total	1,073	100%	11,400	100%

Source: North Carolina Department of Commerce, Labor & Economic Analysis

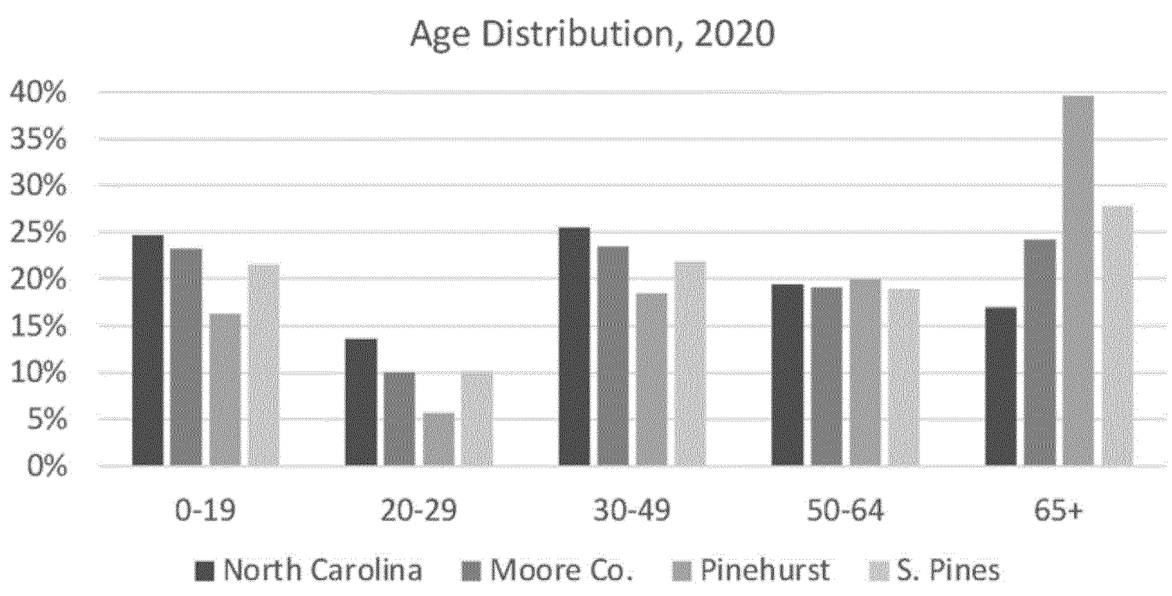
People Who Work in Pinehurst (Where Workers in Pinehurst Live)
Of the people that work in Pinehurst, approximately 50% of them are aged 30-54, while 32% are over the age of 55, and 18% are under the age of 29.

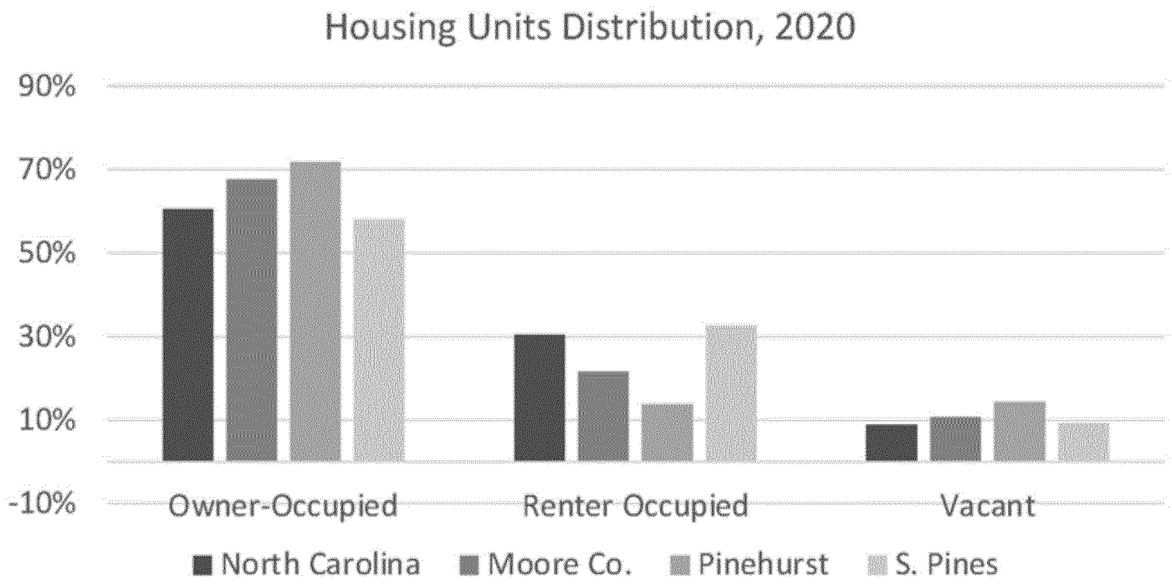
Almost half of the workers make more than $3,333 per month. Over 50% of the workforce has some college, an Associates degree, Bachelor's degree or higher.

Household Data for NC, Moore County, Pinehurst, and Southern Pines (2020-2025)

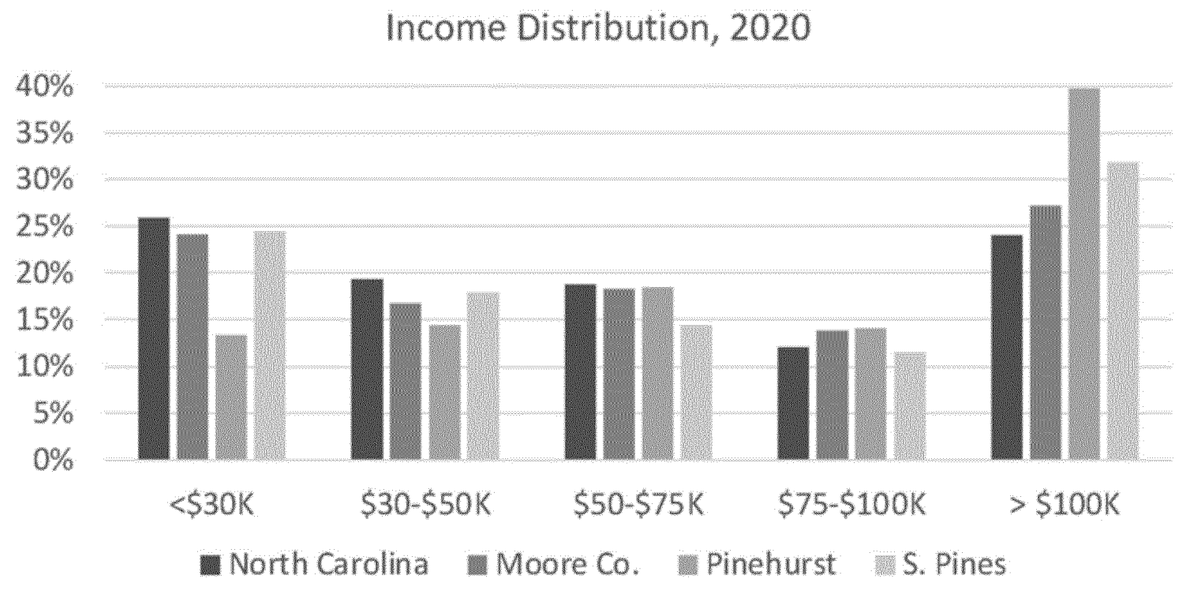
Geography	2020	2025	Growth	Annual Growth Rate
North Carolina	4,341,543	4,494,724	153,181	0.7%
Moore County	43,651	45,169	1,518	0.7%
Moore Co. as % of NC	1.0%	1.0%	1.0%	
Pinehurst Village	7,885	8,100	215	0.5%
Pinehurst as % of Moore	18.1%	17.9%	14.2%	
Southern Pines Town	7,142	7,207	65	0.2%
Southern Pines as % of Moore	16.4%	16.0%	4.3%	

Source: AccessNC, North Carolina Department of Commerce, Labor and Economic Analysis

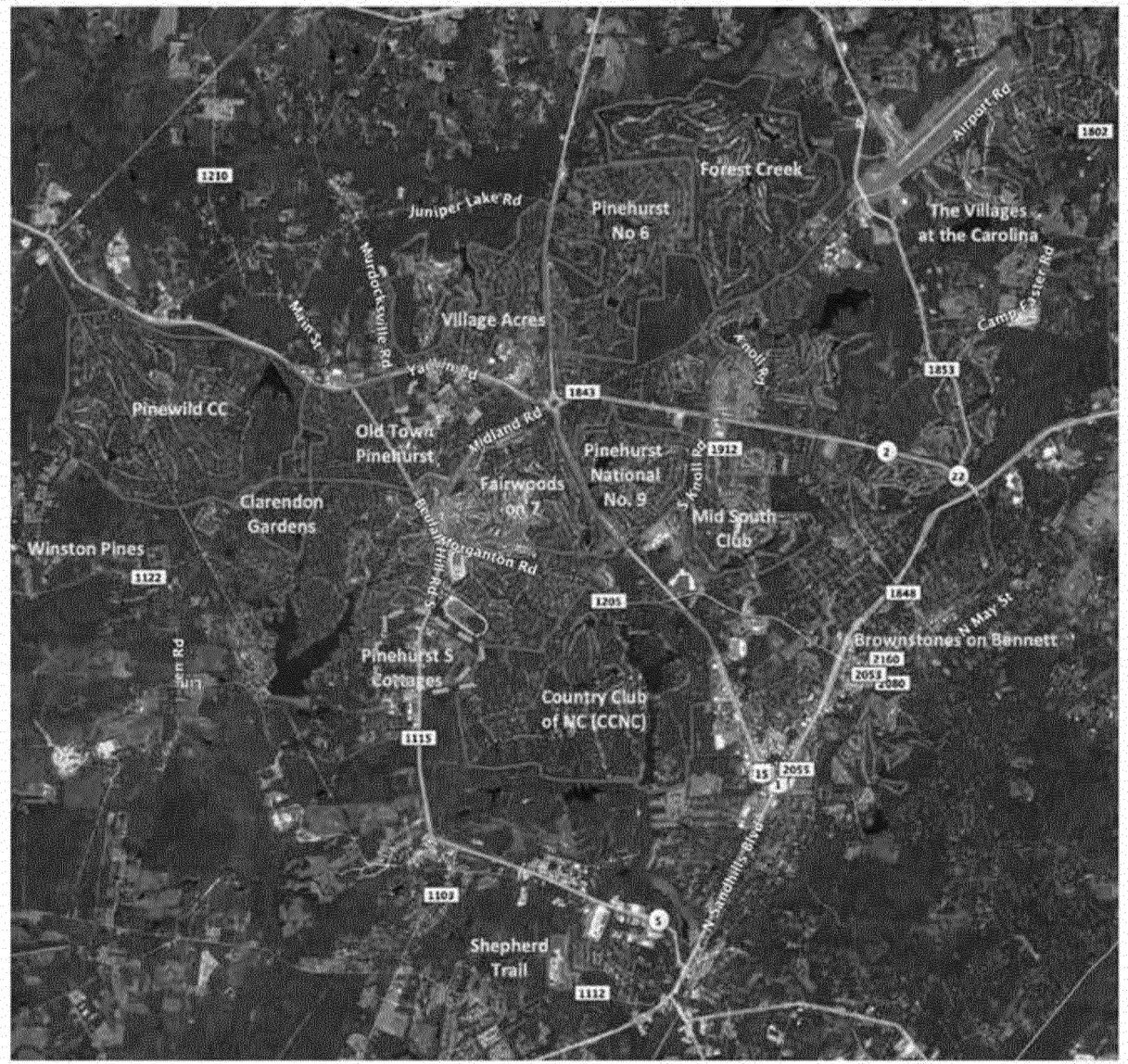




Source: AccessNC, North Carolina Department of Commerce, Labor and Economic Analysis



Source: AccessNC, North Carolina Department of Commerce, Labor and Economic Analysis



KEY

SMALL AREA PLAN (SAP) BOUNDARY

FOR-SALE COMMUNITY OUTLINE

Permits and sales continue to increase

Healthy market with strong demand fundamentals

For-sale in Pinehurst tends to be single-family detached

Demand is high

Home prices continue to rise in Pinehurst - still more attainable/affordable than similar housing in other parts of the country

New homes in non-golf oriented communities are $300,000 to $500,000 on average

New, infill housing in golf-oriented master-planned communities are $450,000 to $750,000

VP

Single-family homes selling in Village Place tend to be priced from $200,000 to $400,000. **Two new homes sold for approximately $300,000**

New product within the study area could be a combination of small lot single-family detached, townhome/attached, and possibly condominium product

The price point would likely be above existing homes within the study area

PS

There are very few for-sale houses within the Pinehurst South study area

Nearby townhouse community built in the late 1980s sells for approximately $180,000 and $230,000

For-sale homes would be marketable in the study area. There could be a combination of small lot single-family detached and townhome/villa product

The pricing would be above the existing product, and likely within the middle band of new houses in the Pinehurst area

Pinehurst is projected to see strong owner household growth over the coming years; both Village Place and Pinehurst South could capture this growth and help create new, walkable, mixed-use neighborhoods



Vacancy continues to remain low (3%) despite the addition of 180 apartment units since 2020

Most Pinehurst rental product is single-family detached homes

Strong, in-balance apartment market

Demand is moderate

Rental rates, although not overly high compared to more suburban areas, have continued to rise in recent years

New rental product in Pinehurst is likely to rent at the higher end of the market, similar to The Greens at Arboretum

One bedrooms range from $1.43 to $1.63 per square foot, two bedrooms range from $1.18 to $1.26 per square foot, and three bedrooms range from $1.25 to $1.55 per square foot

The Greens, a relatively new apartment complex, is located within Village Place

Additional new for-rent residential would be marketable within the study area

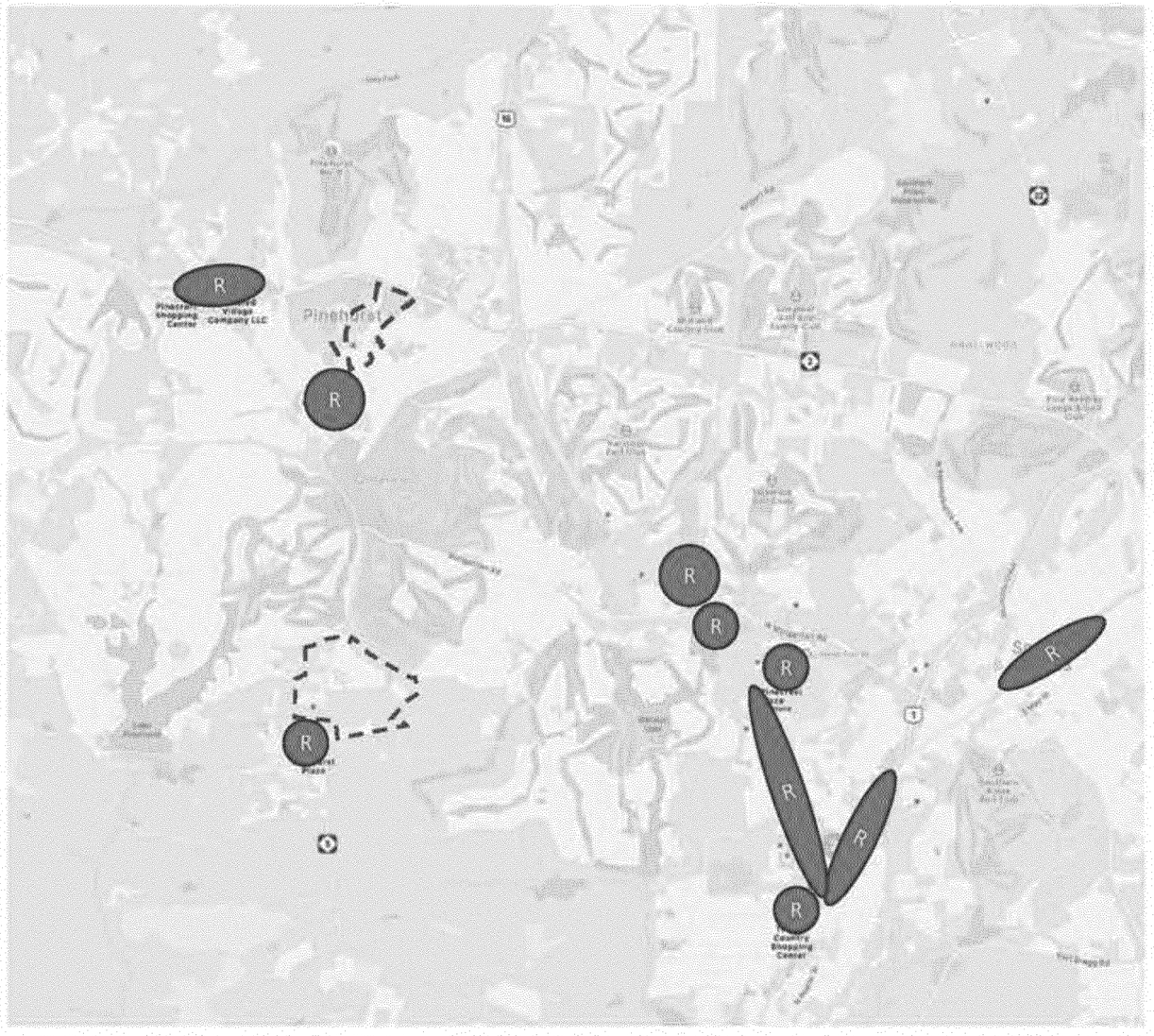
It is walkable to the Village Core, is close to services and amenities, and close to open space

Pinehurst South currently has a rental townhome community, Abingdon Square Townhomes, and the Inn at Quail Haven Village, a senior continuing care retirement community (CCRC)

It would be a marketable location for a rental community

It would likley be positioned below new apartments in Village Place given it is not walkable and farther from services and amenities

Pinehurst is projected to see modest rental household growth over the coming years; both Village Place and Pinehurst South could capture this growth and help create new, walkable, mixed-use neighborhoods



KEY

SMALL AREA PLAN (SAP) BOUNDARY

R RETAIL SHOPPING

Retail occupancy is currently down due to Covid-19, but still performing relatively well compared to other similar parts of the state

Occupancy should increase after the pandemic is over

Demand is moderate, and tied to household growth

The average rental rate has been relatively stable

Rental rates are approaching the amount needed for new construction (roughly $24 to $30/SF)

VP

Village Place is adjacent to the Village Center

Small retail cluster along Rattlesnake Trail. This area could be built upon

Village Place would be an appropriate location for retail including restaurants, entertainment, tourist-oriented, and locally serving retail.

Larger format retail would prefer to be along NC 211, while smaller retail could be an extension of the Village Core, brewery, and retail along Rattlesnake Trail

PS

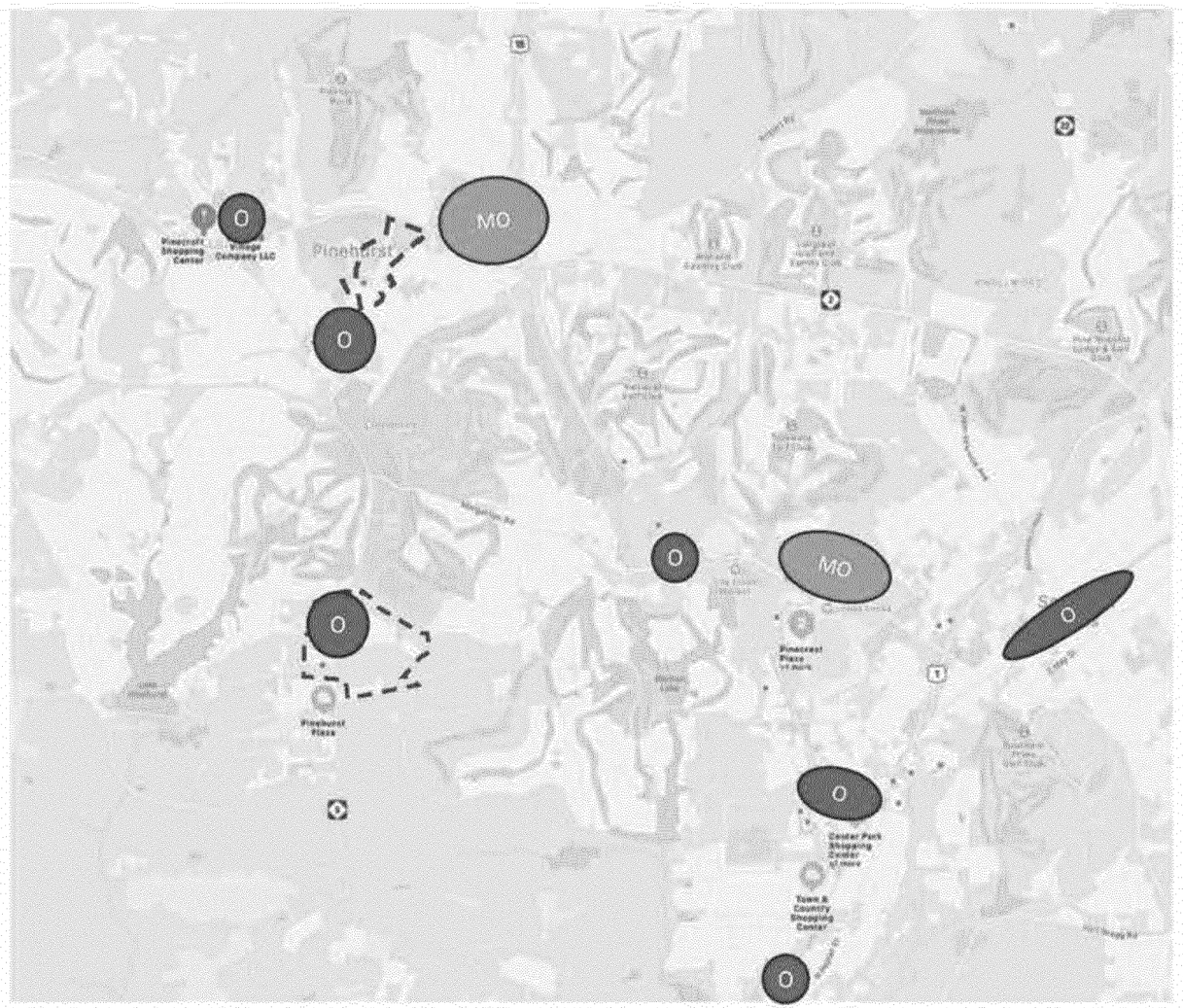
Pinehurst South is adjacent to some underperforming, older retail

A few retail businesses in PS including the new ABC store, bank, and framing shop

Pinehurst South reasonable location for retail. Main challenge on eastern side of NC 5 is access – retail needs good access, and the rail road crossings make that difficult

Western side of NC 5 would be a good location for locally-serving retail and perhaps shopping center

Pinehurst is projected to see modest retail growth over the coming years; both Village Place and Pinehurst South could capture this growth and help create new, walkable, mixed-use neighborhoods.



KEY

- SMALL AREA PLAN (SAP) BOUNDARY
- O — GENERAL OFFICE
- MO — MEDICAL OFFICE

✓

Occupancy continues to remain high and there has been turnover within buildings

New space has been constructed and slowly leased within the area

Pinehurst office is primarily medical and/or locally serving

Demand is relatively low

$

Rental rates for most tenants remains below the threshold to build new product

New office product can be built when leases reach $18-$22/SF

This is starting to happen through the Pinehurst area, so new office construction begins to be feasible

VP

There is very little office currently located within Village Place

Location would be appropriate for small-scale office that is locally-serving and generated such as accountants and real estate professionals

PS

Pinehurst South has a fair amount of office

Some of it is medical office, such as dentists, and some is locally-serving such as financial planners

Location would be appropriate for both office mixed in with other uses as well as more stand-alone, larger office given land availability

Pinehurst is projected to see limited office growth over the coming years; both Village Place and Pinehurst South could capture this growth. In VP it would be part of a walkable, mixed-use neighborhoods. In PS it could also be more office-park like space.



KEY

SMALL AREA PLAN (SAP) BOUNDARY

HOTELS

Occupancy is currently down due to Covid-19

After the pandemic, market is likely to fully rebound to previous occupancy levels (65%)

Demand is low to moderate

The Average Daily Rate has remained strong despite Covid-19 at $131 for 2020

RevPAR is down to $61 for 2020, but should return to pre-Covid levels ($90 in 2019)

VP

The Manor is located within Village Place. 42 rooms and recently renovated. Higher-end hotel in the area

Village Place good location for additional hotel rooms. Close to downtown, NC 211, and could appeal to golf, medical, and business travelers

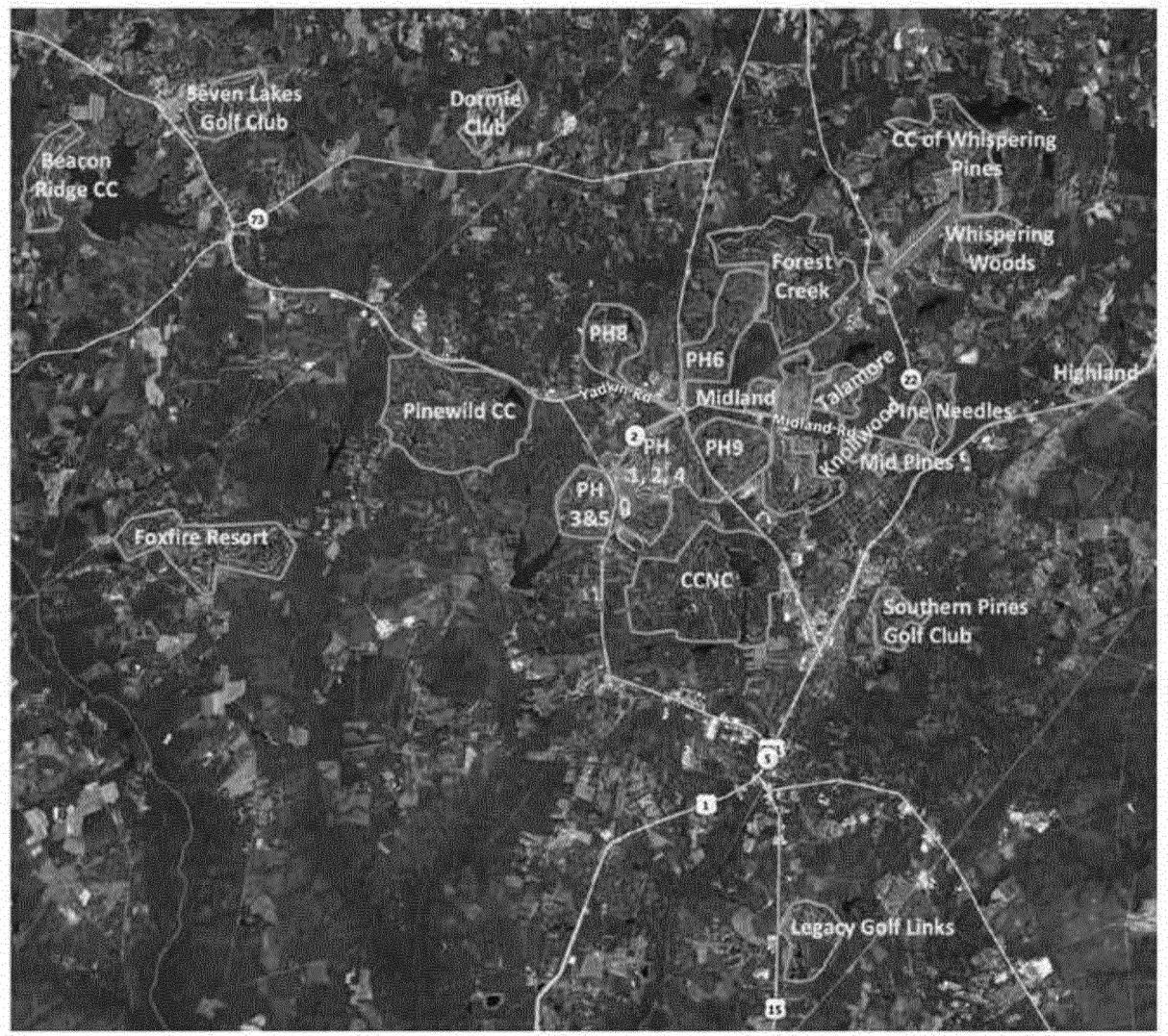
PS

There are no hotels currently in or near Pinehurst South

Majority of hotels in the area are concentrated either close to Pinehurst Center or along the major highways including US 15-501 and US 1

Currently, Village Place would be a more attractive location for a hotel than Pinehurst South

Pinehurst is projected to see modest hospitality growth over the coming years; both Village Place and Pinehurst South could capture this growth and help create new, walkable, mixed-use neighborhoods.



Participation is currently up in the US for the first time in many years

Pinehurst has also seen an increase in the amount of golfers and rounds played this year

According to the National Golf Foundation, the average round in the US costs $61 in 2020

Pinehurst has rates far above the national average for golf

VP

Village Place cannot accommodate a new golf course

Given the nature of the other land uses, this is not as good of a location for other golf uses that might be appropriate in Pinehurst South

PS

Pinehurst South cannot accommodate a new golf course

It could be an appropriate location for golf operations facilities

Pinehurst and the surrounding area are projected to see modest golf growth in the coming years; neither Village Place nor Pinehurst South could support a golf course. Pinehurst South could be a viable location of golf-support activities (maintenance, back of house, etc.).

Summary of Market Opportunity

Land Use	Overall Market Opportunity	Village Place	Pinehurst South
For-Sale Residential	✓✓✓✓✓	✓✓✓✓	✓✓✓✓
For-Rent Residential	✓✓✓	✓✓✓	✓✓✓
Retail	✓✓✓✓	✓✓✓	✓✓✓
Office	✓✓	✓✓	✓✓
Hospitality	✓✓✓	✓✓✓	✓✓✓
Golf	✓✓	O	✓

Key: XXXXX = best, X = worst, O = none

Summary of Demand

Land Use	Demand Potential	Locations within Pinehurst
For-Sale Residential	80-120 homes/year	Almost anywhere
For-Rent Residential	15-25 units/year	Major roads, VP, PS, Village Cntr
Retail	20-25,000 SF/ every 5 years	Major roads, VP, PS, Village Cntr
Office	Up to 5,000 SF/year	Medical area, VP, PS, Village Cntr
Hospitality	25 rooms/yr. in Moore Co.	Resort, Village Cntr, PS, VP
Golf	2-3 courses over the next 10 years in Moore Co.	Focus Area 1 is the only area with space

Summary of Demand for Land Uses within Planning Areas

Land Use	Pinehurst South
For-Sale Residential	Unlimited (up to build-out capacity) 1 project would sell approximately 15-25 homes per year
For-Rent Residential	1-2 projects of up to 200 units each, depending on the location Timing depends on where else apartments have been constructed
Retail	Up to 80,000 SF with grocery, 40,000 SF without grocery
Office	Up to 100,000 SF Limited amount per year. 5,000 SF total in Village. Pinehurst South could capture some of that. Could increase, depending on impact of USGA
Hospitality	1 hotel with approximately 100 rooms
Golf	Possibly some support functions (although the land probably has a higher and better use than maintence for golf)

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3.0 PUBLIC OUTREACH

3.1 OVERVIEW

3.2 PHASE 1 OUTREACH SUMMARY

3.3 PHASE 2 OUTREACH SUMMARY

3.1 OVERVIEW

Public participation helps ensure the plan addresses community concerns and ideas, foster an inclusive and transparent planning process, identify key opportunities and priority areas, and build momentum to move a planning process towards adoption and implementation. Stakeholder input and feedback were critical to creating a community-supported vision for Pinehurst South

A critical task throughout the planning effort was to gather stakeholder input on existing conditions and feedback on proposed concepts. This engagement was conducted through a variety of outreach methods.

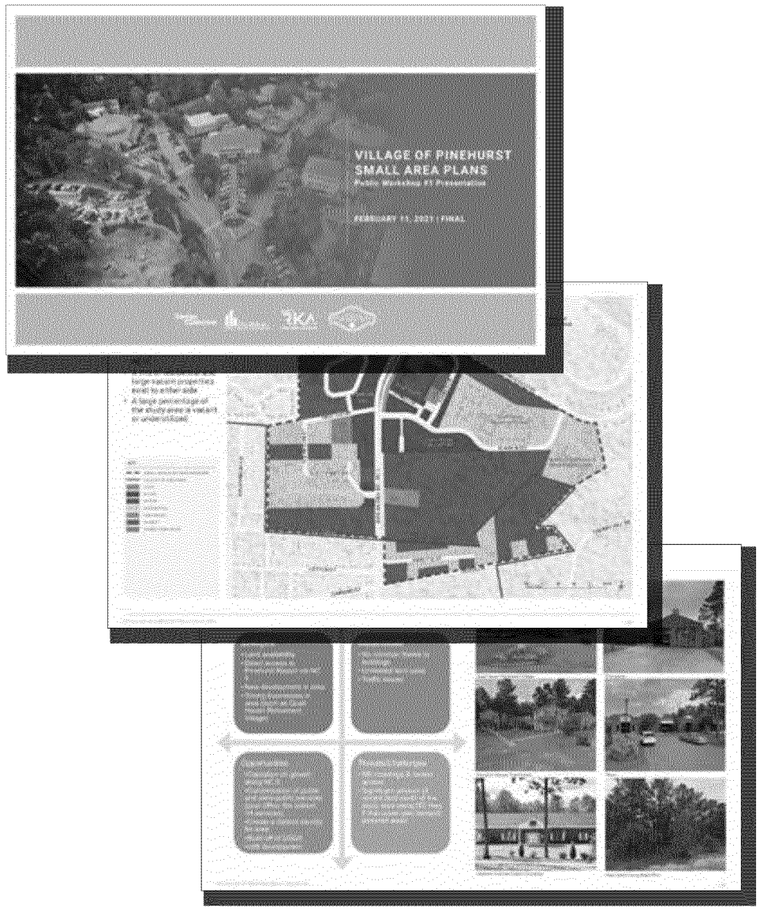
Stakeholder Interviews

Throughout December 2020 and January 2021, the consultant team conducted over 20 key stakeholder interviews, discussing the two plan areas with Village staff, appointed and/or elected officials, agency representatives, committee chairs, residents, local businesses and merchants, golf and tourist industry representatives, major employers, property owners, developers, brokers, and others to further understand their viewpoints.

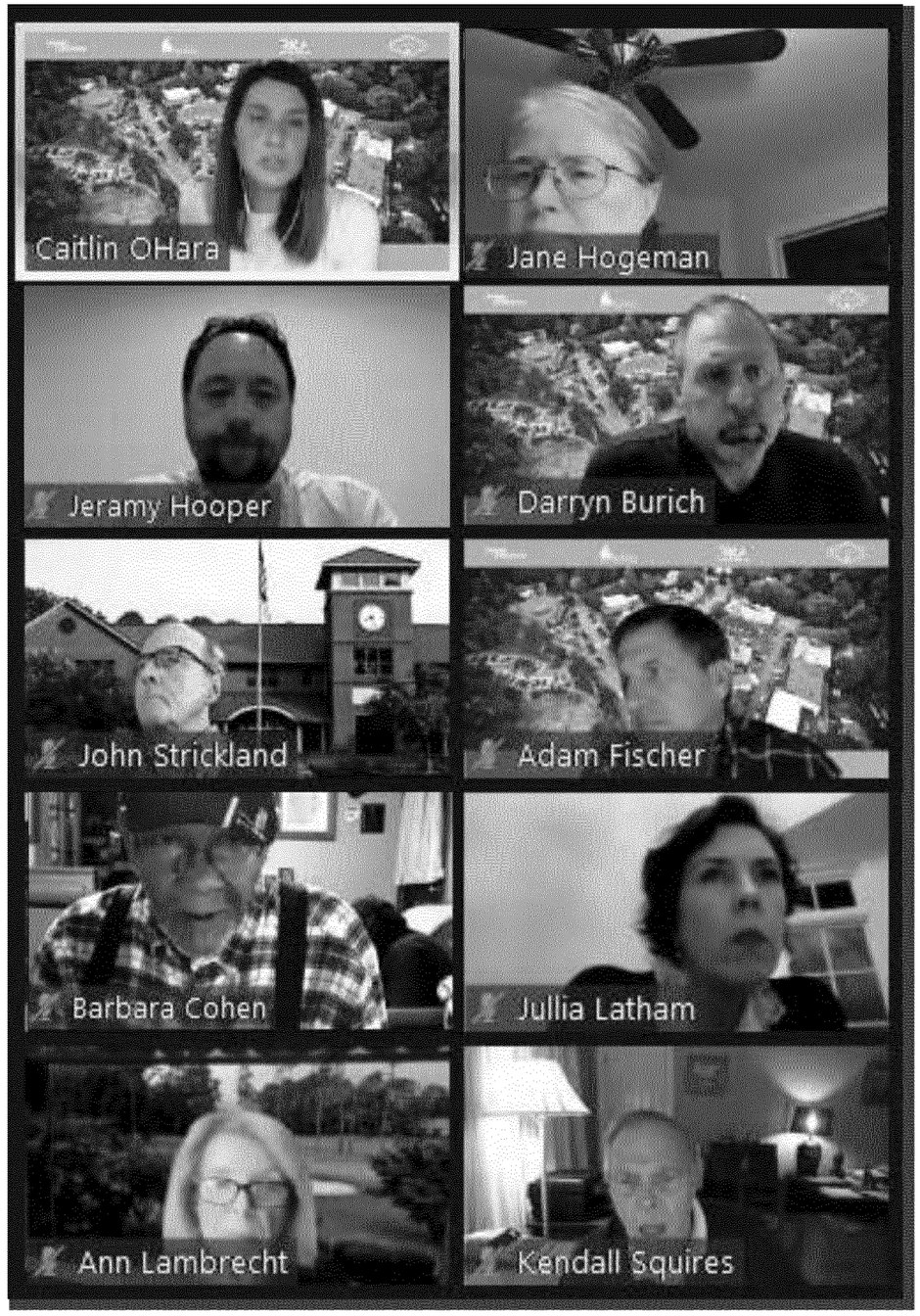
Public Workshops

The consultant team and the Village of Pinehurst held three public workshops to elicit feedback and present work to stakeholders. The workshops were held as follows:

- In February 2021, Public Workshop 1 was held to outline a vision for the future of the two Small Area Plans with public input and guidance. There were 148 registrants (including consultant and Village staff team members), and approximately 100 attendees participated virtually, due to COVID-19 precautions.
- In early June 2021, Public Workshop 2 was held to solicit further feedback on the proposed concepts for the two Small Area Plans. There were 88 registrants (including consultant and Village staff team members) and approximately 59 attendees participated virtually, due to COVID-19 precautions.
- In February 2022, Public Workshop 3 was held to present the draft Pinehurst South Report. There were XX registrants (including consultant and Village staff team members) and approximately XX attendees participated in person at the Fair Barn.



Presentation images from Public Workshop 1



Screenshot images from Virtual Public Workshop 1

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3.2 PUBLIC WORKSHOP 1

Overview

In February 2021, the consultant team and Village of Pinehurst held Public Workshop 1 (of 3) to outline a vision for the future of the two Small Area Plans with public input and guidance.

The Public Workshop was held virtually due to COVID-19. There were 148 registrants (including consultant and Village staff team members), and approximately 100 attendees participated. Darryn Burich (VOP) introduced the team and gave an overview of the project goals and objectives. Cecily Bedwell and Caitlin O'Hara (DCI) presented the project team, project introduction, project schedule and Existing Conditions. Melina Duggal (DREA) presented the Market and Economic Analysis.

Breakout Rooms were utilized to give participants the opportunity to ask questions, give input, and listen to other stakeholders. Each breakout room was facilitated by a member of the project team. Additionally, the project website provided outreach materials as well as an online survey and a summary of the presentation.

The following pages summarize the feedback received as a result of Public Workshop 1.

Pinehurst South Polling Questions

The Public Workshop included two rounds of Polling Questions, one for Village Place and one for Pinehurst South. The polls were available live during the Public Workshop and also on the Project website for 10 days following the event. Participants were encouraged to use the polling questions to express their views on the strengths, weaknesses, and opportunities relating to each Small Area Plan.

This page shows the cumulative results of the Polling Questions for Pinehurst South.

1. What are the strengths of Pinehurst South, as it exists today? Check all that apply. (Multiple choice)

Proximity to Beulah Hill Rd - NC 5	(38/82) 46%
Proximity to Pinehurst Plaza shopping center in Aberdeen	(17/82) 21%
Proximity to Pinehurst Resort and Pinehurst Harness Track	(40/82) 49%
Mix of Commercial and Residential uses	(32/82) 39%
Large, undeveloped parcels	(45/82) 55%
None of the above	(5/82) 6%

2. What are the weaknesses of Pinehurst South, as it exists today? Check all that apply. (Multiple choice)

"Hodgepodge" / "Mishmash" of building types, styles, uses, etc.	(43/82) 52%
Incompatible development which does not reflect the character of the Village	(45/82) 55%
Large, undeveloped parcels	(6/82) 7%
Lack of Open Space and Community Amenities	(28/82) 34%
Lack of Walkability	(55/82) 67%
Lack of access due to the railroad line, to the east of Beulah Hill Rd - NC 5	(28/82) 34%
Traffic on Beulah Hill Rd - NC 5 or elsewhere that affects this area	(70/82) 85%
None of the above	(0/82) 0%

3. What would you like to see (more) of in Pinehurst South? Check all that apply. (Multiple choice)

Retail – Neighborhood Goods and Services (grocery, pharmacy, florist, dry cleaner, nail salon, etc.)	(37/82) 45%
Retail – General Merchandise, Apparel, and Furnishings (clothing, electronics, bookstore, home improvement store, etc.)	(35/82) 43%
Restaurants (any type: sit-down, take-out, coffee shop, etc.)	(47/82) 57%
Office – General Office	(37/82) 45%
Office – Medical	(32/82) 39%
Residential – Apartments (for rent)	(19/82) 23%
Residential – Townhouses / Condo (for sale)	(24/82) 29%
Residential – Single-Family Detached houses (for sale)	(12/82) 15%
None of the above	(8/82) 10%

4. What is your favorite or most frequented place to visit within Pinehurst South? Choose one.

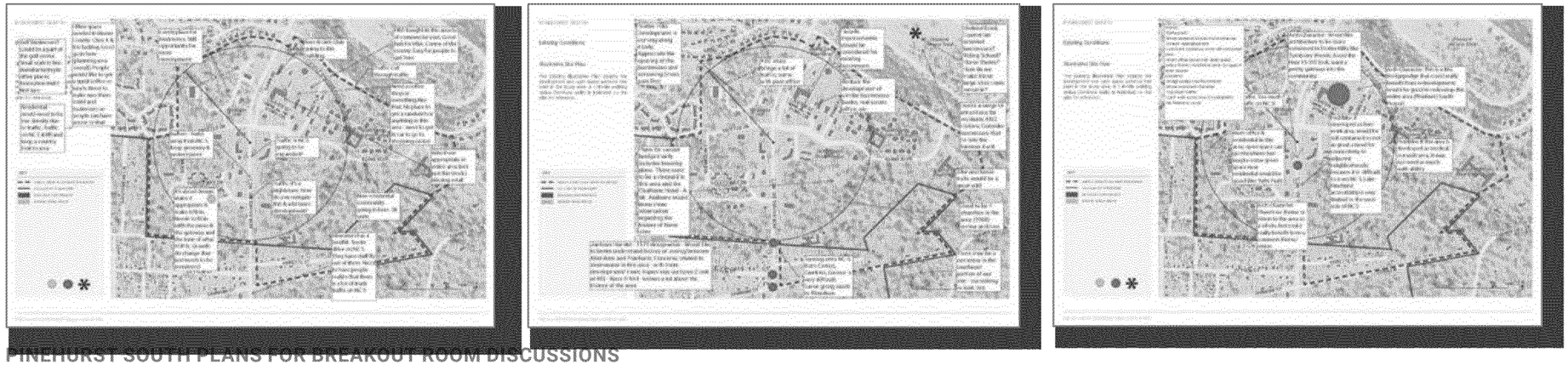
US Post Office	(40) 49%
ABC Liquor Store (...it's ok; this survey is anonymous)	(19) 23%
Businesses within the Trotter Hills Office Park	(3) 4%
Quail Haven Retirement Village (pre-COVID)	(0) 0%
Pinehurst Healthcare & Rehabilitation Center (pre-COVID)	(1) 1%
Another business (a professional office, retail, restaurant, etc.)	(10) 12%
A friend's house	(1) 1%
Other	(4) 5%
I do not spend any significant time here	(4) 5%

Public Workshop 1 Summary

Public Workshop 1 offered the community an opportunity to voice their observations and concerns about the future of Village Place and Pinehurst South. The list below is a compilation of the comments received during the workshop, as well as additional comments received by staff post workshop, for Pinehurst South. For a full list of comments recorded during Public Workshop 1, please visit the project website: www.engage.vopnc.org/smallareaplans.

Land Use

- Development right now is inconsistent
- Strong desire for a public open space in this area
  - Some stakeholders mentioned open space like Tufts Park
  - Build/extend recreational amenities for families in the area
- Low density residential desired by some stakeholders
- Desire for mixed-use:
  - Consider mixed use that disperses traffic, encourages internal circulation
  - This area is currently a bedroom community, needs businesses to help tax base
  - The area between Dawn Road and Parker Lane is seen as an opportunity for mixed-use; it is missing retail right now. A coffee shop or deli would be great – it is easily accessible
- Office space is needed in Moore County – Class A and B is lacking – which would fit this area. However, some stakeholders cautioned against too much office space as COVID has altered the need for it and the future of office is undetermined
- Given proximity to Aberdeen, Rt. 1, and the railroad, Light Industrial may be attracted to this area
- Opportunity for Retail:
  - Along Gaines street
  - Desire for retail uses along Monticello Drive
  - Some stakeholders would like to see a grocery store in this area, while others are happy to go elsewhere
  - Perhaps small-scale businesses, golf businesses, golf centers?
- Desire for office space – clinical/research businesses
- The Innovation HUB as planned in the 2019 Comp. Plan does not resonate with some stakeholders; they are confused by this concept and think it is too much development



PINEHURST SOUTH PLANS FOR BREAKOUT ROOM DISCUSSIONS

The pages above are examples plans shown during the Breakout Rooms for Pinehurst South. For a full reference of these comments, please see the PW 1 Summary document on the project website.

Character

- Pinehurst has numerous neighborhoods that are unique; it is okay to keep them different, but connected to each other
- There is no cohesiveness to character in this area
- Keep country area look
- Trotter Hills coming along nicely, a great opportunity for more development; stakeholders like the park-like setting
- Desire for development like Turnberry Wood
- Landscape:
  - Consider buffers along NC-5 – keep greenery and protect the pines; set development back from the highway.
- Future development needs to fit in with the pines and the gateway and the tone of the Village – growth and change need to be monitored.
- Consider façade improvements for existing businesses near Carter Street; future businesses should vary, not be the same types of uses
- Concern about new vinyl-sided homes and large homes – not sure they match the Village character
- No chain restaurants; no strip centers
- Reuse existing buildings such as Elmore Furniture

Transportation

- Need for an independent, professional traffic study
- Pedestrian:
  - Promote pedestrian circulation over vehicular; make more walkable
  - Walking from residences to retail is desired
  - Desire to cross NC-5 safely
- Vehicular:
  - Traffic on NC-5 is a nightmare and the corridor is littered with trash
  - Trucks on NC-5 from the Aberdeen landfill are a concern; there is a lot of truck traffic
  - NC-5 intersections at Cotton, Dawkins, and Gaines Streets have very difficult turns on both sides
  - Doral Woods exit onto Morganton Road has very traffic heavy
  - Monticello Drive is used as a cut through
  - Future development off Blake Blvd. for 38 homes raises traffic concerns for some stakeholders
  - Residential would need to be low density due to traffic concerns
  - ABC Store and Post Office bring lots of traffic
  - Concern for how to solve traffic; railroad limits widening the roadway.
  - Need for another entrance off Blake Blvd. past the new liquor store
- Need to connect back to Village Center to make this area feel like it is a part of the Village, not isolated/ disconnected
- Consider bike and horse trails near Pinehurst Rehab Center

3.3 PUBLIC WORKSHOP 2

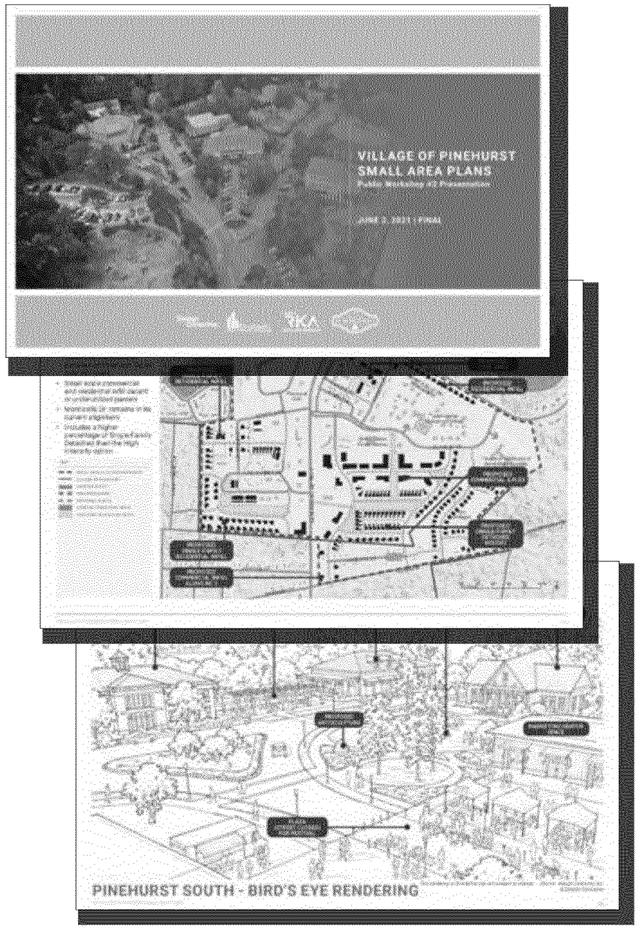
Overview

In Phase 2, from March to May 2021, based on the analysis conducted and feedback received during Phase 1, the consultant team designed and compiled Concept Plan Options, Street Sections, Open Space and Street Network Plan Diagrams, Renderings, Precedent Images, and similar for Village Place and Pinehurst South. During this time frame, the consultant team discussed the two plan areas and concepts with Village staff, appointed and/or elected officials, and key stakeholders and, based on input received, refined the concepts.

In early June 2021, the consultant team and Village of Pinehurst held Public Workshop 2 (of 3) to solicit further feedback on the proposed concepts for the two Small Area Plans. There were 88 registrants (including consultant and Village staff team members) and approximately 59 attendees participated virtually, due to COVID-19 precautions. Cecily Bedwell and MacKenzie Twardus (DCI) presented the Project Overview, Public Workshop 1 Summary, two plan options for each Small Area Plan, and other supporting materials. Melina Duggal (DREA) presented the Market and Economic Analysis summary that contributed to the plan options.

Breakout Rooms were utilized to give participants the opportunity to ask questions, give input, and listen to other stakeholders. Each breakout room was facilitated by a member of the project team. Materials were then posted to the project website to allow for further input.

The following pages summarize the feedback received during Public Workshop 2.

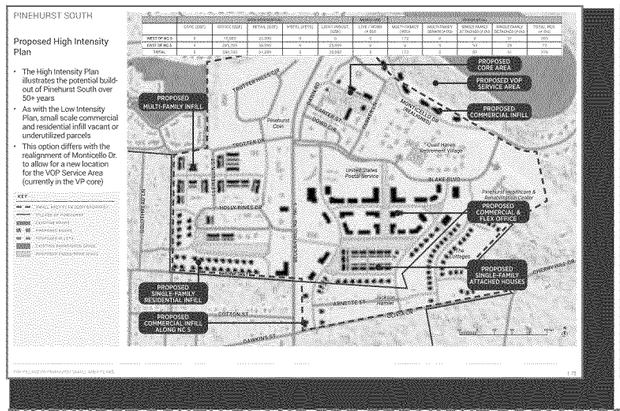


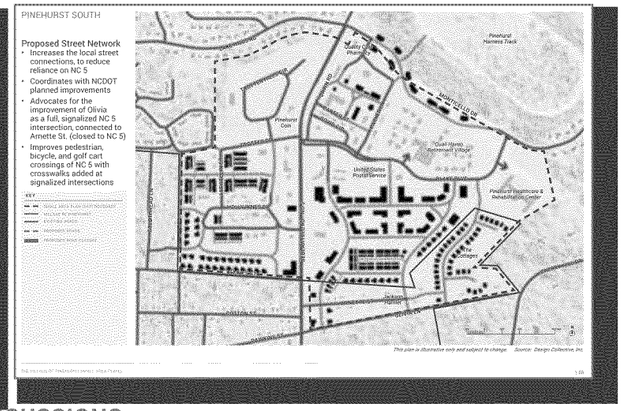


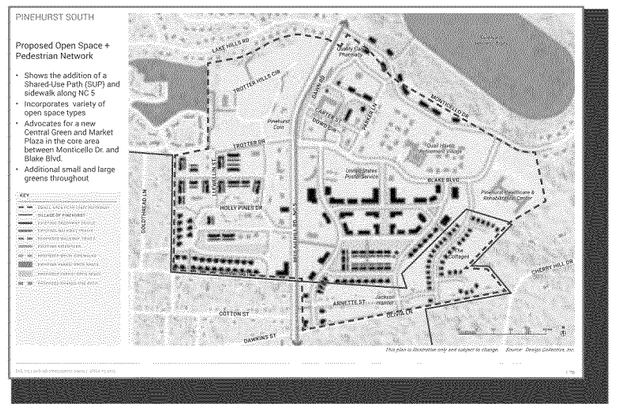
Screenshot images from Virtual Public Workshop 2

Public Workshop 2 Summary

Public Workshop 2 offered the community an opportunity to voice their observations and concerns about the future of Village Place and Pinehurst South. The list below is a compilation of the comments received during the workshop for Pinehurst South, as well as additional comments received post workshop, via the project website survey (see www.engage.vopnc.org/smallareaplans for more information).







PINEHURST SOUTH PLANS FOR BREAKOUT ROOM DISCUSSIONS

The pages above are examples plans shown during the Breakout Rooms for Pinehurst South. For a full reference of these comments, please see the PW 2 Summary document on the project website.

Low and High Intensity Plans

» Many stakeholders support the High Intensity Plan – although it is long term, it creates a good vision for this area.
  - VOP is running out of room so this area is critical to future development. More Multi-Family is needed here.
  - Prefer the idea of moving density here than taking Natural Areas and Green Spaces elsewhere

» However, some stakeholders prefer the Low Intensity Plan and Single-Family units as more in keeping with the Village of Pinehurst (VOP) theme.
  - Desire to make Single-Family lots larger to accommodate backyards and focus on low density with no Multi-Family
  - Some stakeholders are afraid that the High Intensity Plan would bring more traffic and add to the existing traffic problems. There is support for internal streets, but stakeholders do not believe this helps to alleviate traffic on NC-5 in the near term.

» Some stakeholders are in favor of Mixed Use. Mixed used and commercial buildings should still maintain appropriate heights, keeping VOP character.

» Many are against big box stores in the area, preferring smaller, locally-owned businesses

» Support for the Market/Incubator space for small businesses (proposed in the core, north of Blake Blvd.)

» Some stakeholders prefer research/medical businesses here (per Comp. Plan), believing those uses don't generate much traffic

» Concerns about the type of commercial development; needs to be thoughtful.

» Opposition to industrial use near residential area

» Some stakeholders think residential use on east side of NC-5 should be Multi-Family, not Single-Family Detached, as that area was meant to be commercial, Innovation Hub anchor.

» Moving the Pinehurst Public Service Facility from Village Place to Pinehurst South was a surprised to some stakeholders. Many agree that it needs to move, but think that there needs to be a better description of what it is and how will it look. There is also some concern that there may not be enough space for the Service Area.

» Pinehurst South's design should reflect / fit with VOP theme; it should not imitate Village Center, but the design should relate.

Transportation / Circulation

» Sidewalks / Paths:
  - Some think brick sidewalks should be required
  - Walkability is key to growth. Currently nowhere to go
  - Overall support for pedestrian connections and walkability
  - There is an opportunity to connect to Harness Track and Clubhouse by foot.
  - Support for the shared-use path along NC-5 - it would be good to connect it north, to Village Center
  - The residents of the Jackson Hamlet community travel on foot - adding sidewalks/walkability helps underserved community.
  - There should be a shared-use path going west to Lake Hills Road.
  - Focus has been switched from innovation hub to health and wellness; plan needs to reflect this change - more trails to walk or ride.
  - Plan needs to encourage walking to services and increase walkability to ease traffic on NC-5

» Streets
  - Most stakeholders in support of Monticello realignment and relocation of Service Facility here. However, some noted that the Service Facility would fit without relocating Monticello if no commercial was located on the north side.
  - Emphasize connectivity to the Harness Track; this is an asset to the community and it can be enhanced by this adjacent development.
  - There are still many concerns about NC-5 traffic. Some stakeholders do not think this plan helps the traffic problem.
  - Some stakeholders expressed concern that existing parallel parking (in Southern Pines) isn't working well because residents do not like parallel parking
  - Stakeholders are concerned about truck traffic on Monticello, depending on what type of commercial development will be in the area. They would like to know what kind of vehicles would be coming in and out.
  - Community supports the idea of rerouting commercial traffic off NC-5.
  - Concern about street ownership.
  - Some stakeholders think the Railroad should be diverted to bypass all of Pinehurst, altogether. This area could be used to make a greenway to accommodate golf carts from Aberdeen to Pinehurst.
  - Open up area around USGA headquarters - multi modal movement from Aberdeen to Pinehurst - almost to Southern Pines area - connect three small towns
  - Like that this plan would alleviate traffic on local streets
  - Plan looks appropriately Olmstedian in street pattern

Buildings:

» Preference for commercial/retail along the green space to encourage public use and engagement.

» Stakeholders would like to see a cohesion of architecture and landscape to blend everything together. FBC will be important.
  - Buildings (especially Multifamily, Mixed Used, and Commercial) need to have lots of open space, and breathing room around them, to avoid looking out of place.
  - Some stakeholders did not like the proposed 8-, 10-, 12-unit multi-family buildings

Open Space:

» Some stakeholders think that there is not enough open space in this plan.

» This is an entry corridor; it is important to have landscape and Village character here to reflect the theme of VOP. People should know they are entering VOP. Some stakeholders think that more landscape is needed in this area.

» Some stakeholders desire access to more sports fields, recreation areas for families in this area - possibly a sports campus with soccer, baseball, tennis, etc.

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4.0 RECOMMENDATIONS

4.1 OVERVIEW

4.2 GUIDING PRINCIPLES

4.3 CONCEPT DESIGN

4.4 FINAL DESIGN

Overview

The recommendations for Pinehurst South are broken down into three components: Guiding Principles, Concept Design, and Final Design. The material in this section takes into consideration the Phase 1 Existing Conditions analysis, the review of the previous plans and studies, and input received from stakeholders.

Approach

CHARACTER:

- Gateway at NC-5 & Blake Blvd. is important
- Architecture does not need to emulate the Village Center (VC), but should reflect the overall character of the Village
- New streets should reflect the curvilinear character of the Olmsted plan where practical, in response to topography, etc.
- 1-2 stories is preferred
- Jackson Hamlet: respect this historically Black neighborhood and its residents' history
- Explore ways to tie in the history of the Chalfonte Hotel and Ambassador 's Club, two historic buildings in this area that no longer exist

LAND USE:

- Explore placemaking/center east of NC-5, between Monticello Drive and Blake Blvd., given the nexus of the Post Office, Pharmacy, ABC, Dowd Cabin, and the new Girls & Boys Club
- Explore variety of residential types (including cottages, townhouses, live-work, and missing middle residential) as well as infill commercial
- Departure from 2019 Comp. Plan; the Innovation District is better suited to Focus Area 3: Medical District as it requires an anchor institution: medical, university, etc. Alternatively, this area could be anchored by the Golf Industry
- Incorporate new Open Spaces

TRANSPORTATION:

- Help alleviate traffic congestion on NC-5 by providing network/expanding connectivity
- Explore "Rails with trails" Shared-Use Path (SUP) east of NC-5, between roadway and rail (no golf carts)
- Coordinate with NCDOT sidewalk and roadway improvements along the west side of NC-5
- Study golf cart connections (west to east) and NC-5 and railway crossings (2 existing)

Guiding Principles

The Guiding Principles below informed the Concept and Final Designs found within this document and should carry through in future development and improvements within Pinehurst South. These defining planning principles help creating lively, walkable, desirable, and cohesive neighborhoods. The Guiding Principles employed for this planning effort are separated into universal Planning Principles and specific Olmsted and Manning Principles as follows.

PLANNING PRINCIPLES:

- Create a connected circulation network
- Incorporate Complete Streets
- Strengthen building frontage
- Provide a variety of public open spaces
- Design streets for flexible programming
- Promote health and wellness through neighborhood design

OLMSTED & MANNING PRINCIPLES:

- Design curvilinear street forms, following topography and continuously redirecting views
- Incorporate triangular parks at curvilinear street intersections
- Create an organic grid with short, walkable blocks (no cul-de-sacs)
- Maintain consistent building setbacks (except for civic uses)
- Encourage tree-lined streets
- Organic landscape design in Open Spaces

Concept Design

Following the Public Outreach engagement and the Guiding Principles research, the consultant team began a concept design process to explore options for development in Pinehurst South. The purpose of this phase (Phase 2) was to explore options for the Pinehurst South Small Area Plan and elicit feedback from Village staff and representatives as well as stakeholders. The Concept Design was presented as part of Public Workshop 2. The feedback on these designs was critical to generating the Final Design, which can be found in *Section 4.4* of this document.

Final Design

The Final Design (i.e., the preferred design solution) is a combination of text, perspective renderings, framework plans, streetscapes, and a potential build-out plan and absorption plan that represent the culmination of the feedback received through the project's Public Outreach process as well as the insight achieved from the existing conditions analysis, best practice and precedent research, and the concept design studies. The Final Design includes recommendations for planning and transportation elements throughout Pinehurst South. The Final Plan and its accompanying recommendations encompass the entire plan area and consider its surroundings and broader context. The Final Design helps to create an interconnected and coordinated approach for recommendations and inform the design the Detail Plan.

For Pinehurst South, two Build-out Plan Scenarios are shown due to the desire for flexibility. Build-out Plan - Scenario 1 shows a plan with a higher intensity program, including Single-Family Attached (SFA) residential east of NC-5, while Build-out Plan - Scenario 2 shows a plan with a lower intensity program, incorporating more Single-Family Detached (SFD) residential.



Village Center streetscape depicting the curving streets and irregular groupings of evergreen and deciduous planting that are the hallmark of the original Olmsted & Manning vision for Pinehurst
Source: Design Collective

Form-Based Code (FBC)

The Form-Based Code (FBC) is a companion document to this Small Area Plan (SAP) report. While this document focuses on the existing conditions analysis, best practice and precedent research, Concept Design studies, the Final Design plan and recommendations, as well as stakeholder feedback, it should be seen as an account of the planning process and the intent and vision established collectively. The FBC, on the other hand, is a regulating document, taking the intent and vision established through this planning process and formulating precise development standards that help ensure the vision becomes reality. Property owners, whether from the public or private sector, and their design teams will be required to follow the criteria laid out in the FBC when designing and submitting their intended development or improvement. The Village will use the FBC to review submissions, to ensure they are in compliance.

Planning Principles

The universal Guiding Principles below identify overarching design strategies for achieving an engaging, successful, and sustainable built environment. Additionally, on the following pages, the Olmsted and Manning Principles are design strategies specific to the historic design of the Village of Pinehurst which should be preserved and emulated in Pinehurst South. These principles have been identified as essential strategies for improving Pinehurst South and should be used to guide zoning modifications, streetscape and transportation improvements, and new development throughout the area.

1. CREATE A CONNECTED CIRCULATION NETWORK

» Provides greater accessibility through more direct routes, compared to a branching system

» Increases overall network efficiency and reliability through added redundancy

» Improves multi-modal transportation and encourages walking and bicycling

» Improves safety and public health

» Improve and expand golf cart accessibility

2. INCORPORATE COMPLETE STREETS STRATEGIES

» Incorporate bicycle and pedestrian facilities (e.g., accessible, passable sidewalks; curb ramps; bike racks; dark sky compliant, LED lighting; etc.)

» Integrate innovative stormwater management

» Improve the existing streetscapes to promote safe, comfortable, and convenient access for all users

» Require new development to design and improve streets to meet the Complete Streets principles and enhance and expand the pedestrian, bicycle, golf cart, and vehicular networks

3. STRENGTHEN BUILDING FRONTAGE

» Define Frontage with Street Trees and Buildings

» Relegate parking to side or rear

» Encourage infill development that respects traditional frontage patterns, with buildings lining streets

» Locate building entrances along primary streets and provide easy access and wayfinding for all users

» Require new development in the core area to have buildings with active ground-floor uses along primary streets to create engaging streetscapes

4. PROVIDE A VARIETY OF PUBLIC OPEN SPACES

» Incorporate a variety of passive and active open spaces to serve a broad base of users

» Promote an active lifestyle at all stages, by providing family-friendly outdoor activities and integrated accessible features and facilities

» Distribute open spaces to encourage daily use and access by walking and bicycling

» Require new development to provide a variety of appropriately-scaled open spaces and provide connections to the trail network. For proper village-scaled development, open space should equate to approximately 8% of the developable land area.

5. DESIGN STREETS FOR FLEXIBLE PROGRAMMING

» Streets in core locations should be flexible and adaptable

» Able to carry pedestrians, bicycles, and vehicles on the typical day

» But on event days, or in unique circumstances like the pandemic, be able to close to vehicular traffic to host festivals, in-street dining, provide additional open space, etc.

» Explore parking ratio reductions

6. PROMOTE HEALTH AND WELLNESS THROUGH NEIGHBORHOOD DESIGN

» Connect people with health, fitness, and wellness through daily engagement and activity

» Create places to Live-Work-Play-Eat-Shop in an enriched natural setting that promotes healthy lifestyles

» Promote walkable, mixed-use neighborhoods, lessening dependence on vehicles

» Celebrate Pinehurst's founding as a health resort village



1. CREATE A CONNECTED NETWORK



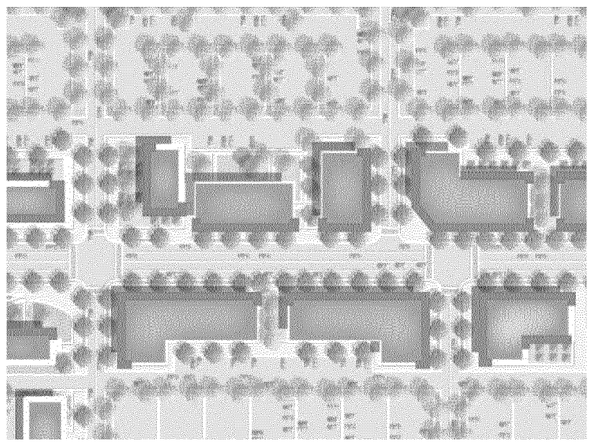
4. PROVIDE A VARIETY OF PUBLIC OPEN SPACES



2. INCORPORATE COMPLETE STREETS STRATEGIES



5. DESIGN STREETS FOR FLEXIBLE PROGRAMMING



3. STRENGTHEN BUILDING FRONTAGE

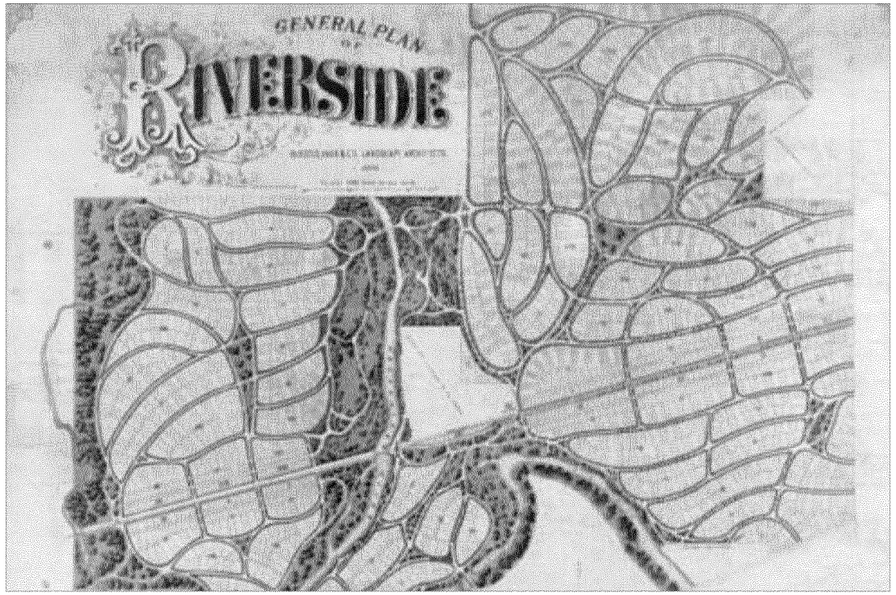


6. PROMOTE HEALTH AND WELLNESS ENVIRONMENTS

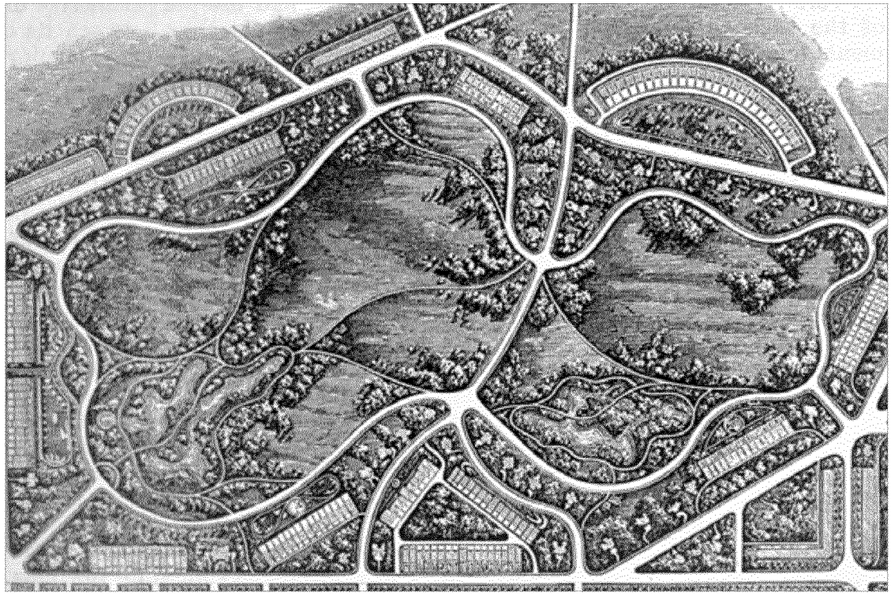
Olmsted Planning Principles

In 1895, James Walker Tufts hired the landscape architecture firm Olmsted, Olmsted, and Eliot to design the Village of Pinehurst as a health-centered resort. Known as the "Founder of American Landscape Architecture", Frederick Law Olmsted brought his design philosophy and planning principles to bear on Pinehurst - an approach that can be seen in many of his designs for towns, cities, and parks. These "Olmstedian" Principles include the following design strategies:

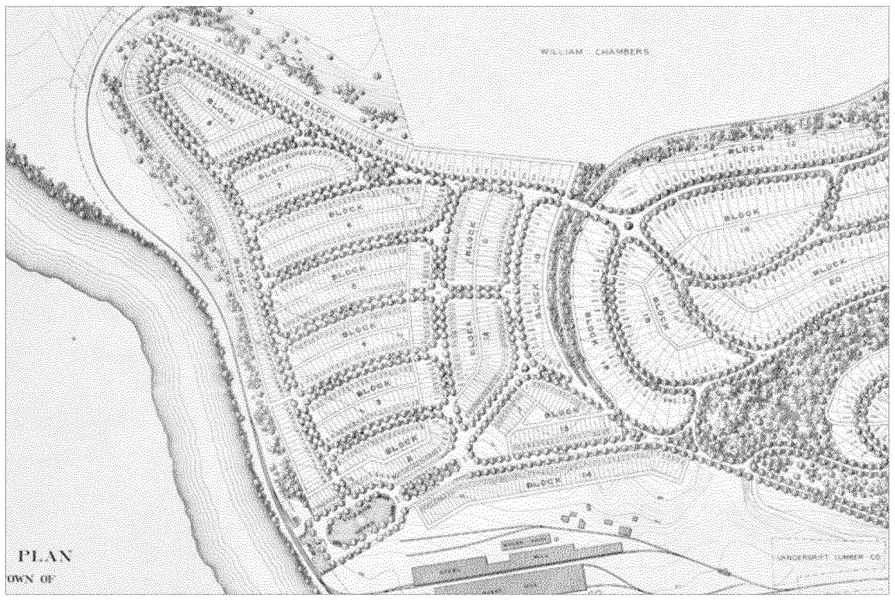
- Design curvilinear street forms, following topography and continuously redirecting views
- Incorporate triangular parks at curvilinear street intersections
- Create an organic grid with short, walkable blocks (no cul-de-sacs)
- Maintain consistent building setbacks (except for Civic uses)
- Encourage tree-lined streets, typically with regularly-spaced shade trees
- Organic landscape design in Open Spaces



Olmsted Plan: Riverside, IL
Credit: Enjoy Illinois



Olmsted Plan: Birkenhead Park - United Kingdom
Credit: The American Cyclopedia v. 13, 1879



Olmsted Plan: Vandergrift - Westmoreland Co, PA
Credit: Alamy Stock Photo



Olmsted Plan: Sherwood - Richmond, VA
Credit: National Park Service/Sherwood Land Co.

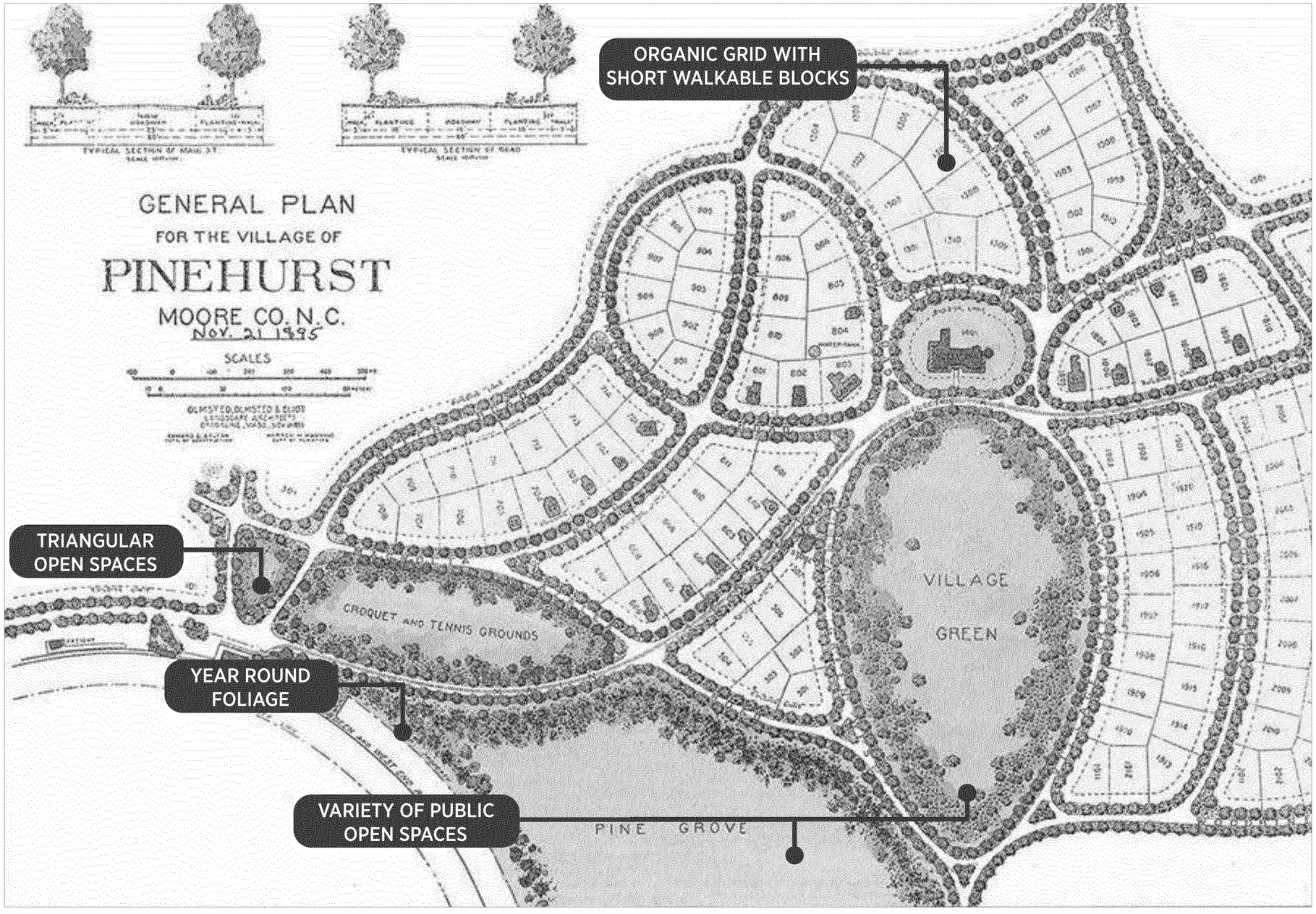
Olmsted and Manning Principles and the Village

The General Plan for the Village of Pinehurst, shown to the right, exhibits many of the iconic "Olmstedian" characteristics of design. However, Olmsted's assistant Warren H. Manning also uniquely influenced the vision and execution of the plan, carrying out most of the major landscape design work and implementation. To view more detail, see the *Pinehurst National Historic Landmark Nomination Registration Form*.

- Design curvilinear street forms, providing a more relaxed approach to "getting there"
- Create an effect of a park-like oasis
- Encourage the use of native plants, primarily evergreens and plants with winter interest, to create a year-round green village. To note, while the plan to the right depicts a regular, linear spacing of deciduous street trees, the built landscape of Village Center represents an organic approach with irregular groupings of odd-numbered, mixed evergreen and deciduous plantings along the street edge)
- Accommodate new patrons and winter residents by providing additional recreational venues (this later became a focus on the golf industry with designer Donald James Ross)



Village Center
Credit: Village of Pinehurst



Overview

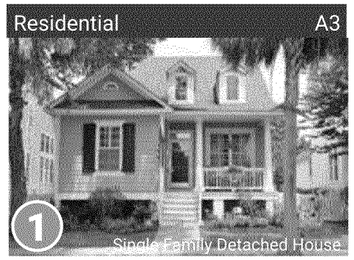
Following the Public Outreach and Guiding Principles research, the consultant team led a Concept Design process to explore options for development in Pinehurst South. The purpose of the Concept Design phase (Phase 2) was to explore options for the Pinehurst South Small Area Plan and elicit feedback from stakeholders and continued input from Village staff and representatives. The following pages outline images, diagrams, and plan options that were developed and presented as a part of Public Workshop 2. The feedback on these concept designs and images was critical to generating the Final Design, which can be found in *Section 4.4* of this document.

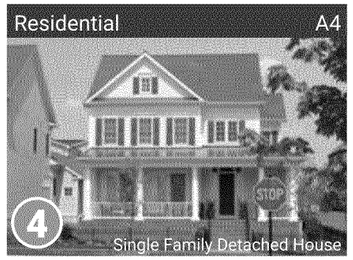
The images to the right show stakeholder preference feedback received in Public Workshop 2 Breakout Room Discussions. The images were shown as precedents for the architecture, streetscapes, parking, and parks/open spaces of Pinehurst South. Participants were encouraged to respond "like" (with green dots) or "dislike" (with red dots) to each photo; the numbers within the green and red dots indicate the number of stakeholder responses.

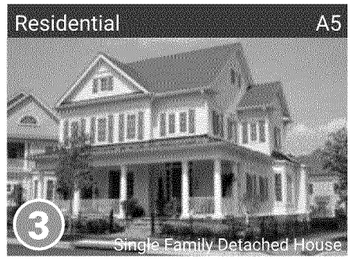
ARCHITECTURE



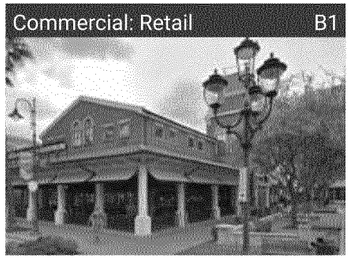








ARCHITECTURE



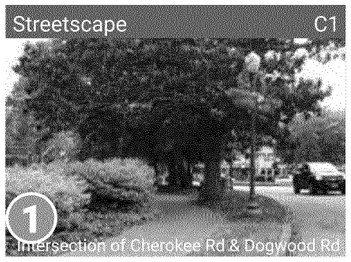


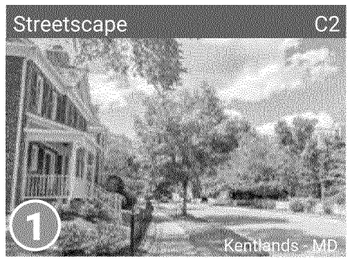


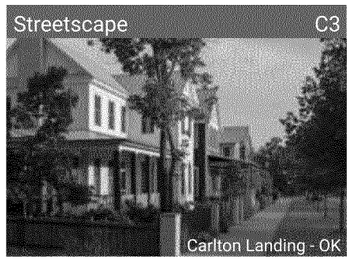


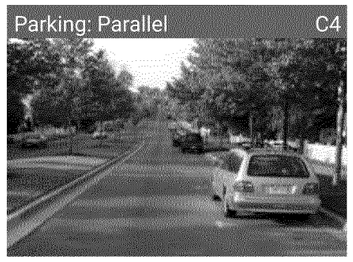


STREETSCAPE/ PARKING





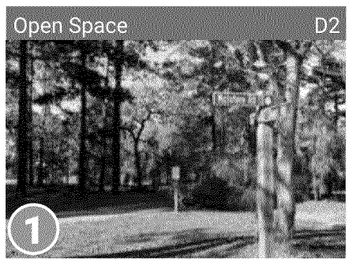






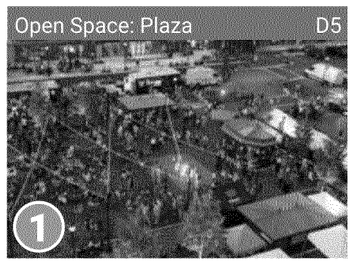
PARKS/ OPEN SPACE











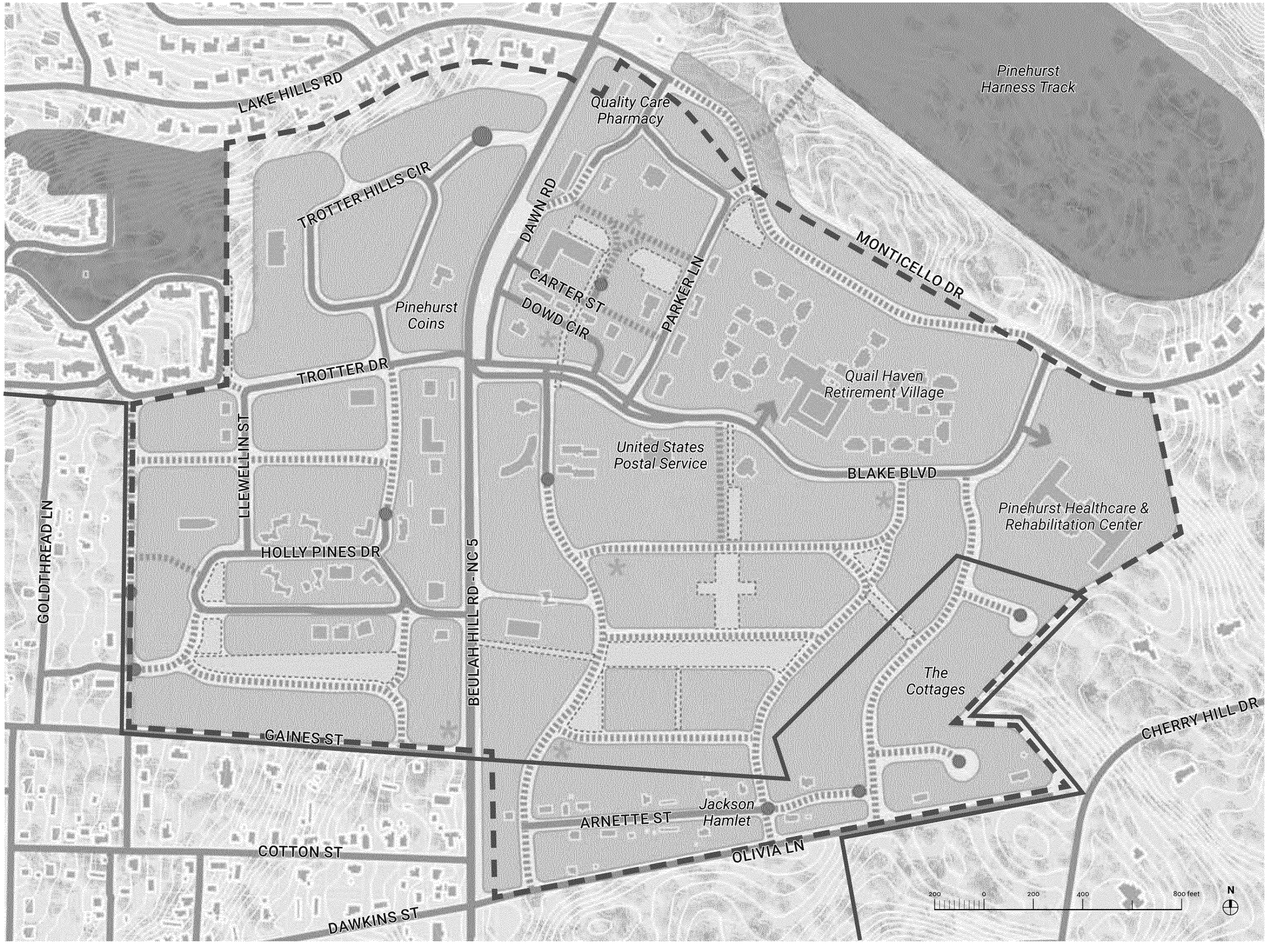
PUBLIC INPUT RECEIVED BASED ON BREAKOUT ROOM DISCUSSIONS

The feedback above is a summary of all Breakout Rooms. Participants were encouraged to respond to "like" (green) or "dislike" (red) for each photo.

Parti/Block Diagram

The Parti/Block Diagram was presented as part of Public Workshop 2. The purpose of this plan was to elicit feedback and conversation about development patterns and circulation in Pinehurst South. This plan should be considered a preliminary concept study and not the final recommended plan. To see the Final Plan (preferred design solution), please see *Section 4.4* of this document.

- The Parti diagram illustrates the Approach in plan form
- The diagram shows the proposed addition of new streets, forming new blocks and creating a more connected street network



KEY

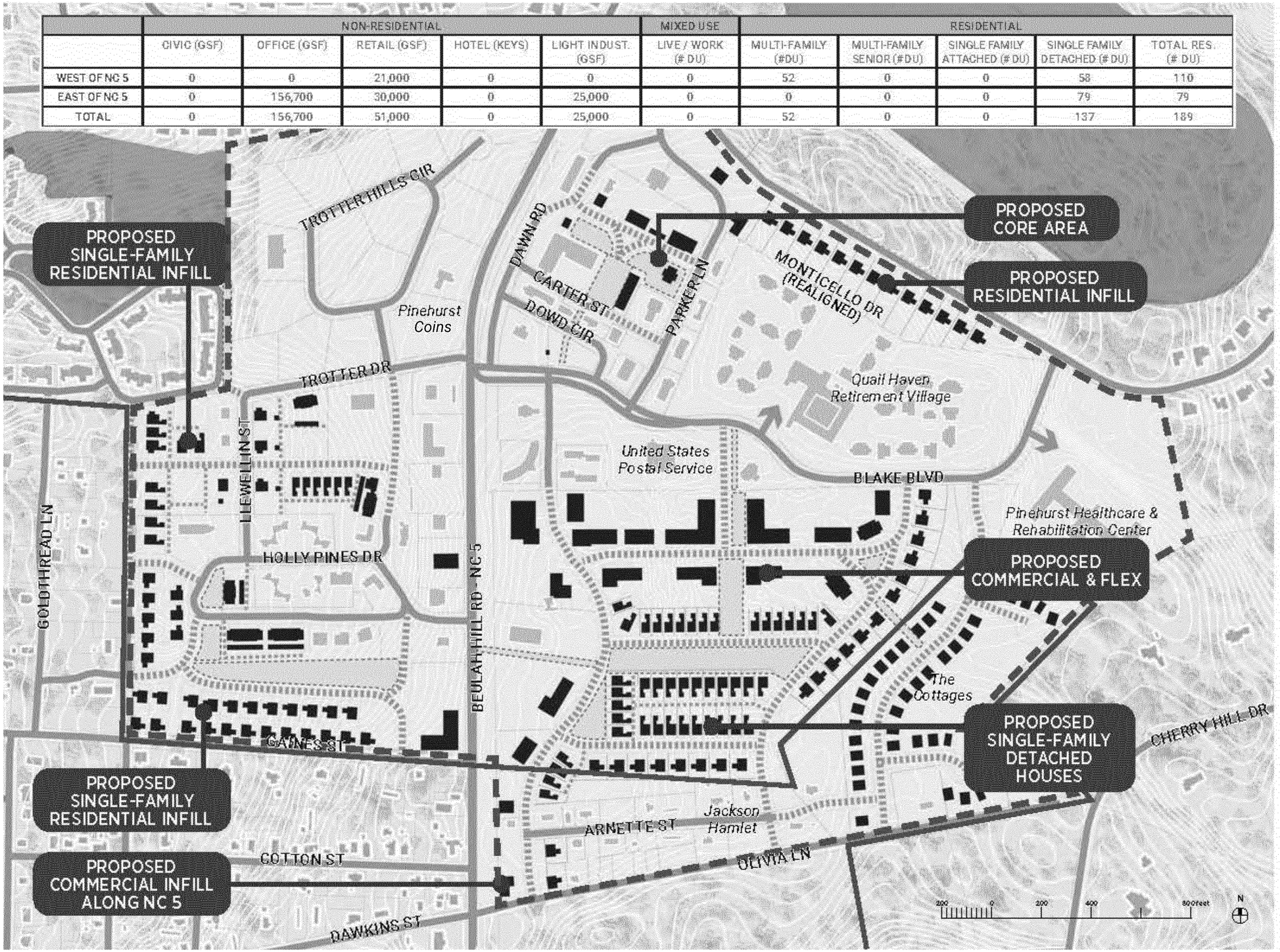
- SMALL AREA PLAN (SAP) BOUNDARY
- VILLAGE OF PINEHURST
- EXISTING ROADS
- PROPOSED ROADS
- EXISTING DEAD END
- EXISTING PARKS/ OPEN SPACE
- PROPOSED PARKS/ OPEN SPACE
- PROPOSED BLOCKS
- PROPOSED PROMINENT BUILDING LOCATION

Concept Design
Low Intensity Plan Option

The Low Intensity Plan Option was presented as part of Public Workshop 2. The purpose of this plan was to test opportunity sites; see what building and parking configurations might fit on parcels; and elicit feedback and conversation about development patterns and intensity of new infill. This plan should be considered a preliminary concept study and not the final recommended plan. To see the Final Plan (i.e., the preferred design solution), please see *Section 4.4* of this document.

- The Low Intensity Plan illustrates the potential build-out of Pinehurst South over 30+ years. This plan includes a higher percentage of Single-Family Detached units
- Small scale commercial and residential infill vacant or under-utilized parcels
- Monticello Dr remains in its current alignment

	NON-RESIDENTIAL					MIXED USE	RESIDENTIAL				
	CIVIC (GSF)	OFFICE (GSF)	RETAIL (GSF)	HOTEL (KEYS)	LIGHT INDUST. (GSF)	LIVE / WORK (# DU)	MULTI-FAMILY (#DU)	MULTI-FAMILY SENIOR (#DU)	SINGLE FAMILY ATTACHED (# DU)	SINGLE FAMILY DETACHED (# DU)	TOTAL RES. (# DU)
WEST OF NC 5	0	0	21,000	0	0	0	52	0	0	58	110
EAST OF NC 5	0	156,700	30,000	0	25,000	0	0	0	0	79	79
TOTAL	0	156,700	51,000	0	25,000	0	52	0	0	137	189



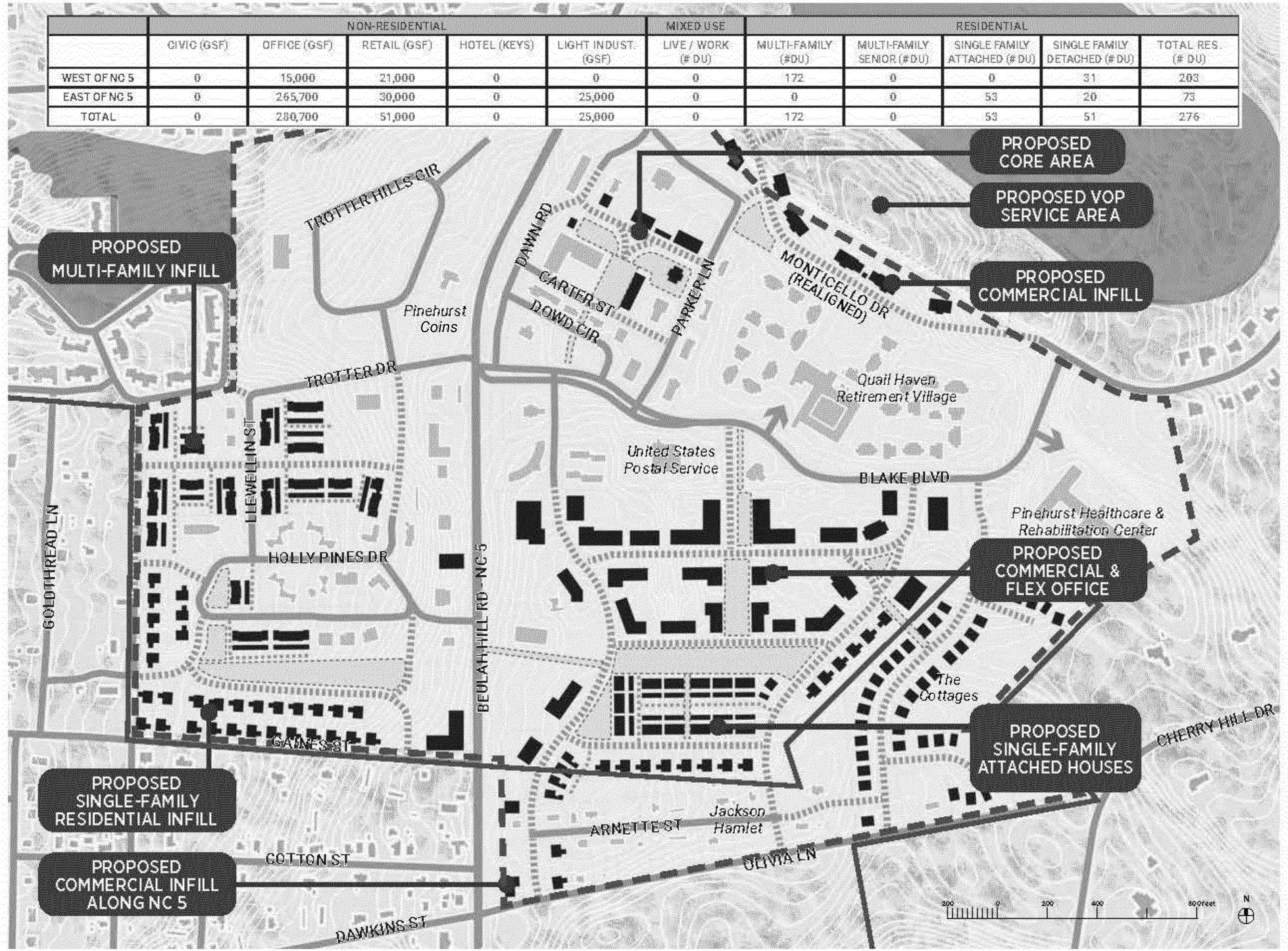
This plan is illustrative only and subject to change. Source: Design Collective, Inc.

Concept Design
High Intensity Plan Option

The High Intensity Plan Option was presented as part of Public Workshop 2. Similar to the Low Intensity Plan, the purpose of this plan was to test opportunity sites; see what building and parking configurations might fit on parcels; and elicit feedback and conversation about development patterns and intensity of new infill. This plan should be considered a preliminary concept study and not the final recommended plan. To see the Final Plan (i.e., the preferred design solution), please *Section 4.4* of this document.

- The plan illustrates the potential build-out of Pinehurst South over 50+ years.
- This plan includes a higher percentage of Single-Family Attached and Multi-Family residential units
- As with the Low Intensity Plan, small scale commercial and residential infill vacant or under-utilized parcels
- Monticello Dr. is realigned to allow for a new location of the Village's Public Service Area to the north

	NON-RESIDENTIAL					MIXED USE	RESIDENTIAL				
	CIVIC (GSF)	OFFICE (GSF)	RETAIL (GSF)	HOTEL (KEYS)	LIGHT INDUST. (GSF)	LIVE / WORK (# DU)	MULTI-FAMILY (#DU)	MULTI-FAMILY SENIOR (#DU)	SINGLE FAMILY ATTACHED (# DU)	SINGLE FAMILY DETACHED (# DU)	TOTAL RES. (# DU)
WEST OF NC 5	0	15,000	21,000	0	0	0	172	0	0	31	203
EAST OF NC 5	0	265,700	30,000	0	25,000	0	0	0	53	20	73
TOTAL	0	280,700	51,000	0	25,000	0	172	0	53	51	276



This plan is illustrative only and subject to change. *Source: Design Collective, Inc.*

Overview

The Final Design comprises renderings, framework plans, and street sections that represent the culmination of the planning process and feedback heard through the project's Public Outreach efforts. It also incorporates the Guiding Principles, discussed in Section 4.2 of this document. The Final Design includes recommendations for land use and transportation throughout Pinehurst South and illustrates the intent of the vision through graphics and text. It is important to note that the plans and renderings herein are illustrative only; development will occur as individual property owners come forward with development plans. The Form-Based Code (FBC), a companion document to this report, is the regulatory document that will ensure development plans (whether by the private or public sector) abide by the recommendations of this *Pinehurst South Small Area Plan*.

The Aerial Rendering to the right demonstrates how Pinehurst South may appear at full build-out. The rendering shows the following:

» Infill commercial adjacent to NC-5 for visibility and access. New office and flex-building uses infill the area south of Blake Blvd.

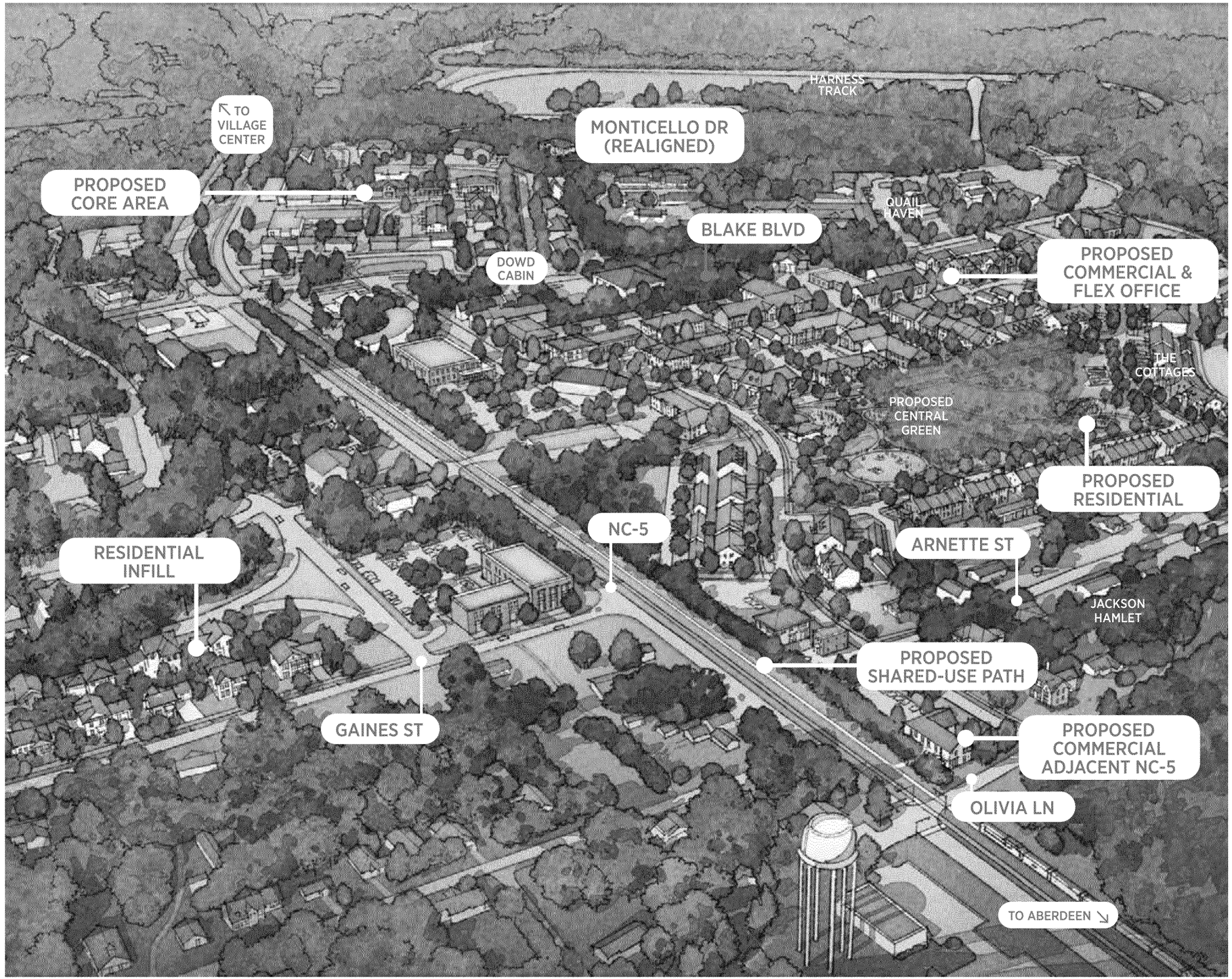
» A large Central Green between Blake Boulevard and Arnette Street will provide ample opportunity for residents and commercial users of this neighborhood to enjoy outdoor activities that are both active and passive. See page 62 of this document for more detail on this open space.

» Residential infill to the south helps to transition from new development to the existing historically Black neighborhood of Jackson Hamlet

» Residential development west of NC-5.

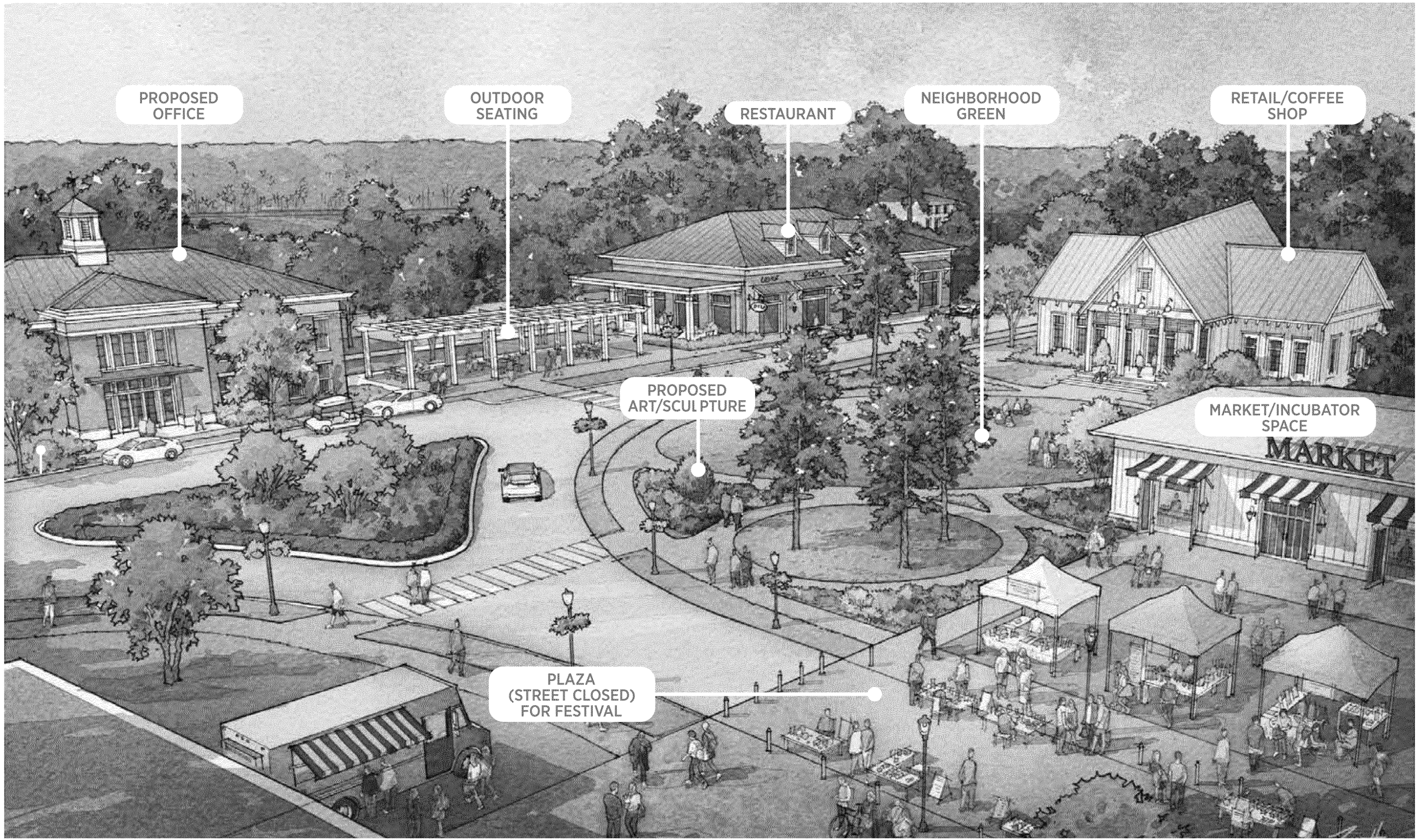
The Bird's Eye Rendering on the following page shows a conceptual view of the new core area between Monticello Drive and Blake Boulevard that will serve as a new destination for neighborhood retail and services, restaurants, an incubator space for new businesses and makerspace, and a plaza for markets and festivals.

The renderings are conceptual and represent one of many scenarios that could happen over the next 50+ years in Pinehurst South. Future development will depend on the interest of public and private property owners in developing or selling their property. The development will also be dependant on future changes to the market demand in the Village of Pinehurst.



PINEHURST SOUTH - AERIAL RENDERING

This rendering is illustrative only and subject to change. *Source: Design Collective, Inc. & Zanetta Illustration*



CORE AREA - BIRD'S EYE RENDERING

This rendering is illustrative only and subject to change. Source: Design Collective, Inc. & Zanetta Illustration

Core Area Detail Plan

The Detail Plan illustrates the potential build-out of the core area south of Monticello Dr. and north of Blake Blvd.

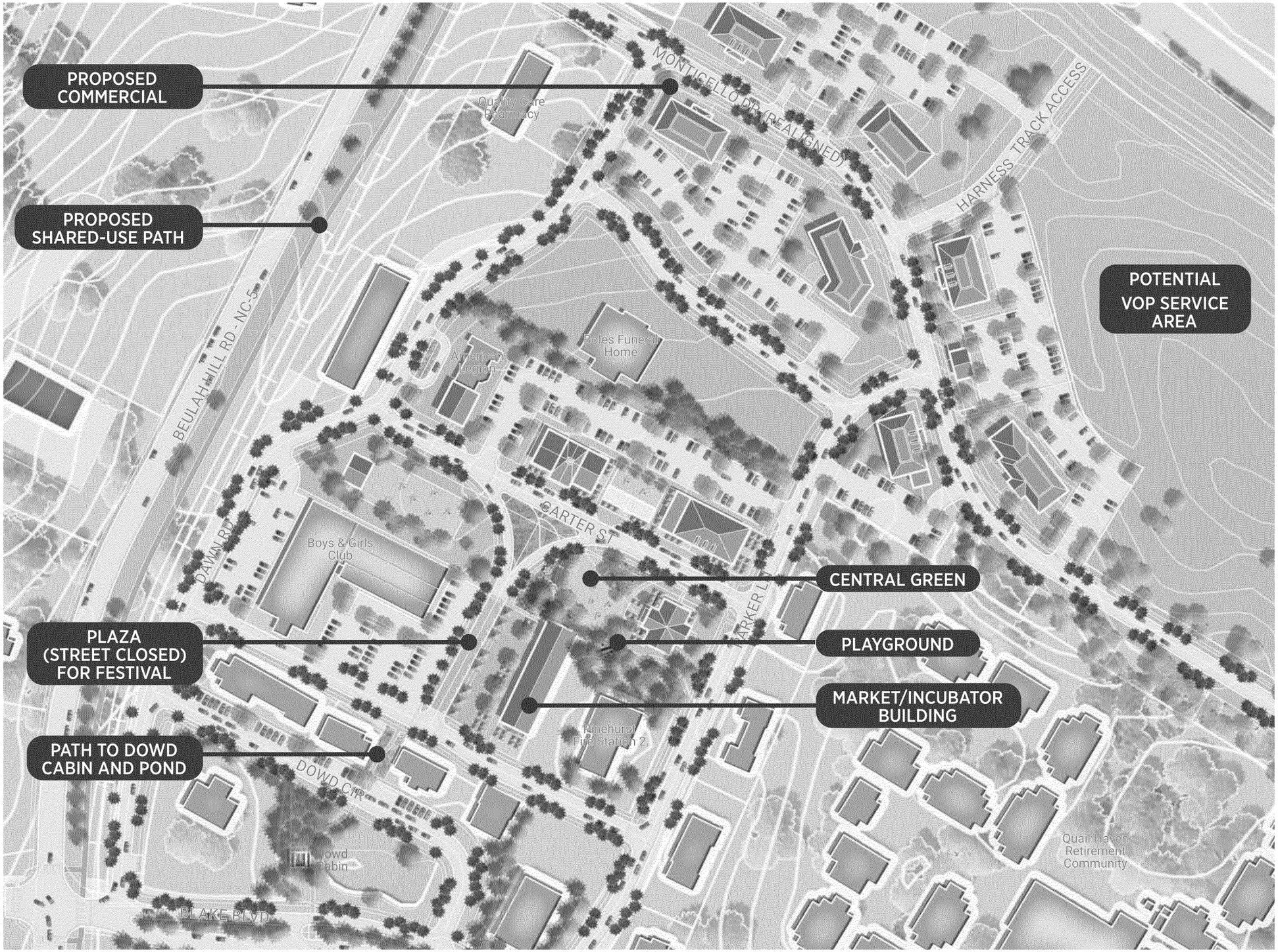
The development builds off the existing Post Office, Pharmacy, ABC, and Dowd Cabin as well as the planned Girls & Boys Club and National Association of Home Builders.

New open spaces include a Market Plaza, Central Green, playground, and path south to Dowd Cabin

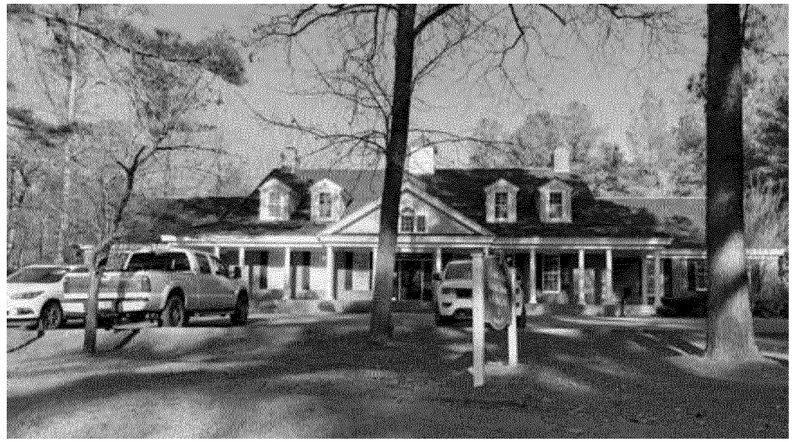
A new Central Green anchors the new development, serving as a gathering place for community events.

KEY

- EXISTING BUILDINGS
- PROPOSED BUILDINGS
- PROPOSED BUILDINGS



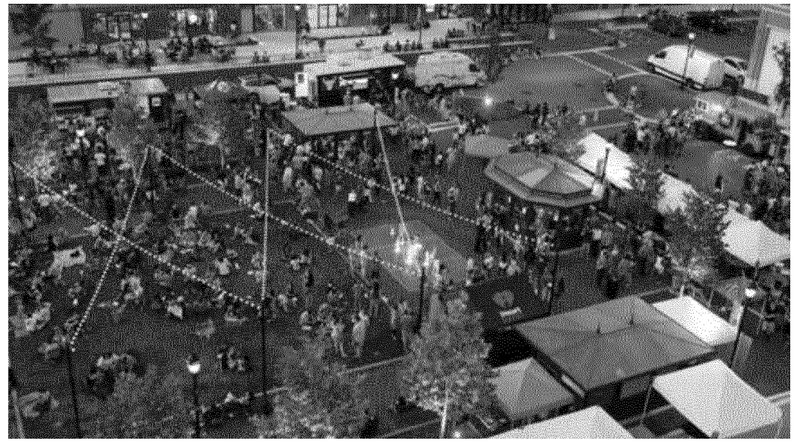
This plan is illustrative only and subject to change. Source: Design Collective, Inc.



Precedent - Office - Turnberry Wood
Credit: Design Collective



Precedent - Mixed Use - Mashpee Commons, MA
Credit: PCA Design



Precedent - Market Square - Baltimore, MD
Source: Design Collective



Precedent - Plaza - Summersville, SC
Credit: LaQuatra Bonci



Precedent - Playground - Portland, OR
Credit: Greenworks SPC



Precedent - North Village Market Pavilion, Prospect, Kentucky
Credit: Google Maps



Precedent - Small Retail Shop - Summersville, SC
Credit: CRBJ Bizwire



Precedent - Farmers Market - Atlanta, GA
Credit: Community Farmers Markets



Precedent - Food Truck Event - Salem, MA
Credit: North of Boston



Precedent - Streetscape - Pinehurst, NC
Source: Design Collective

Proposed Open Space + Pedestrian Network

The existing Pinehurst South plan area contains no dedicated public open space or trails within its boundary. The Pinehurst Harness Track lies just to the north.

All new development should add to the network, creating publicly-accessible greens, plazas, and trail connections to serve the surrounding office and residential uses.

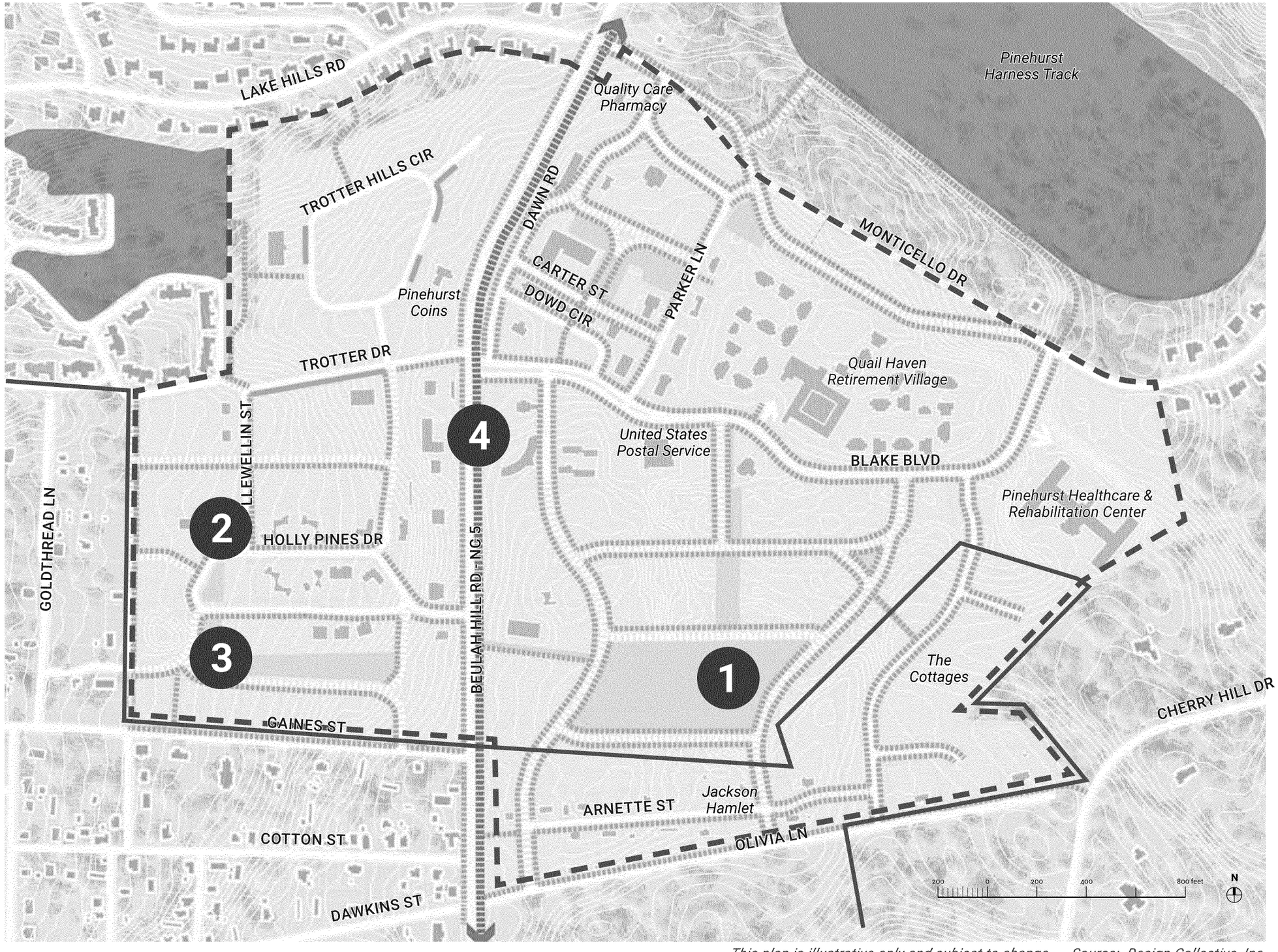
A Market Plaza is shown in the core area between Monticello Drive and Blake Blvd. and a new, large Central Green is shown to the south, east of NC-5.

A new Shared-Use Path (SUP) and sidewalk are shown along NC-5.

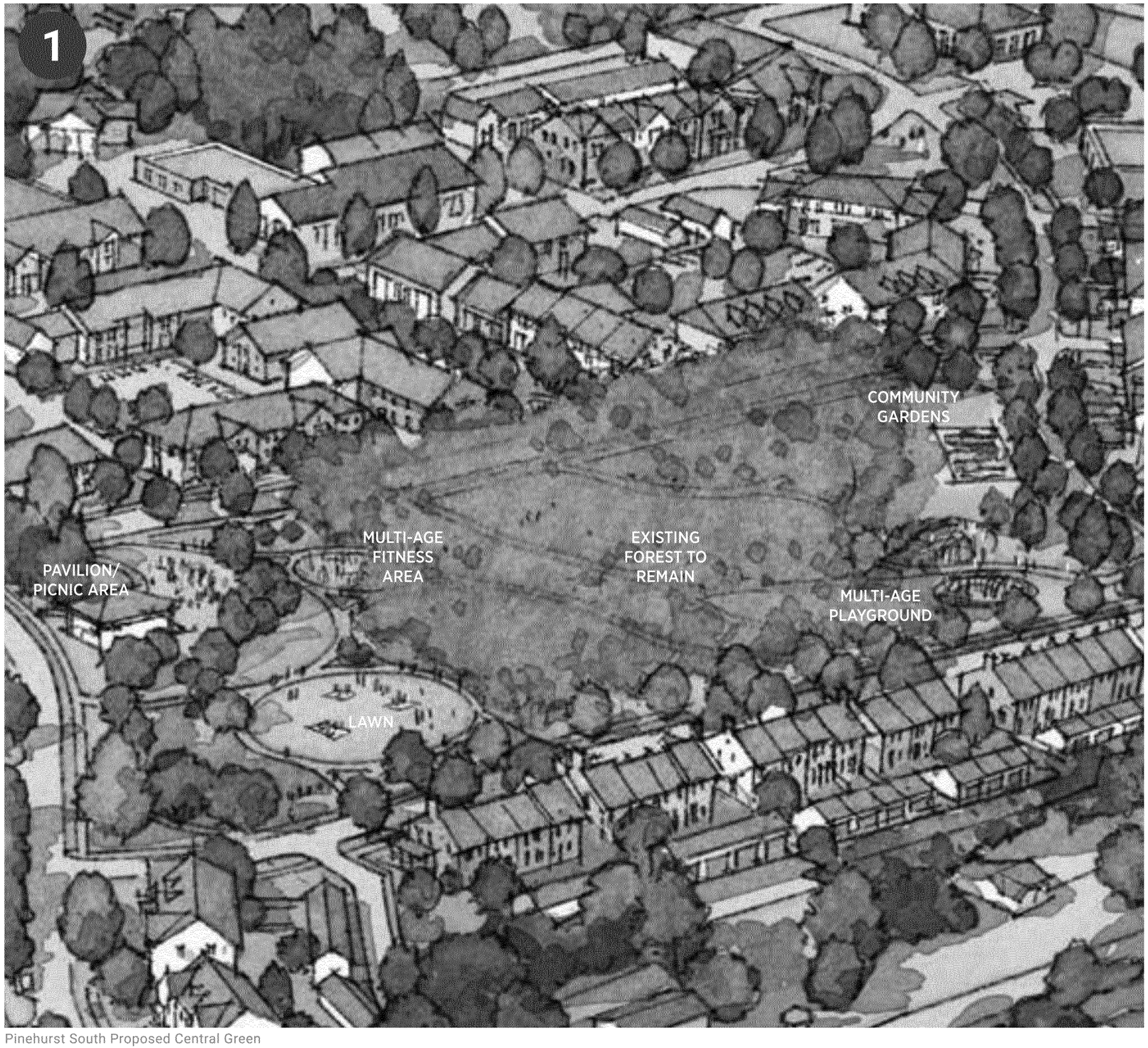
KEY

- SMALL AREA PLAN (SAP) BOUNDARY
- VILLAGE OF PINEHURST
- EXISTING SIDEWALKS
- PROPOSED SIDEWALKS*
- EXISTING PARKS/ OPEN SPACE
- PROPOSED PARKS/ OPEN SPACE
- PROPOSED SHARED-USE PATH

**Proposed sidewalks shall be brick in commercial areas*



This plan is illustrative only and subject to change. Source: Design Collective, Inc.



Pinehurst South Proposed Central Green
Source: Design Collective



Precedent - Attached Green - Maple Lawn, MD
Credit: Design Collective



Precedent - Attached, Linear Green - Maple Lawn, MD
Source: Design Collective



Precedent - Shared-Use Path
Source: Village of Pinehurst

Open Space Detail Plan

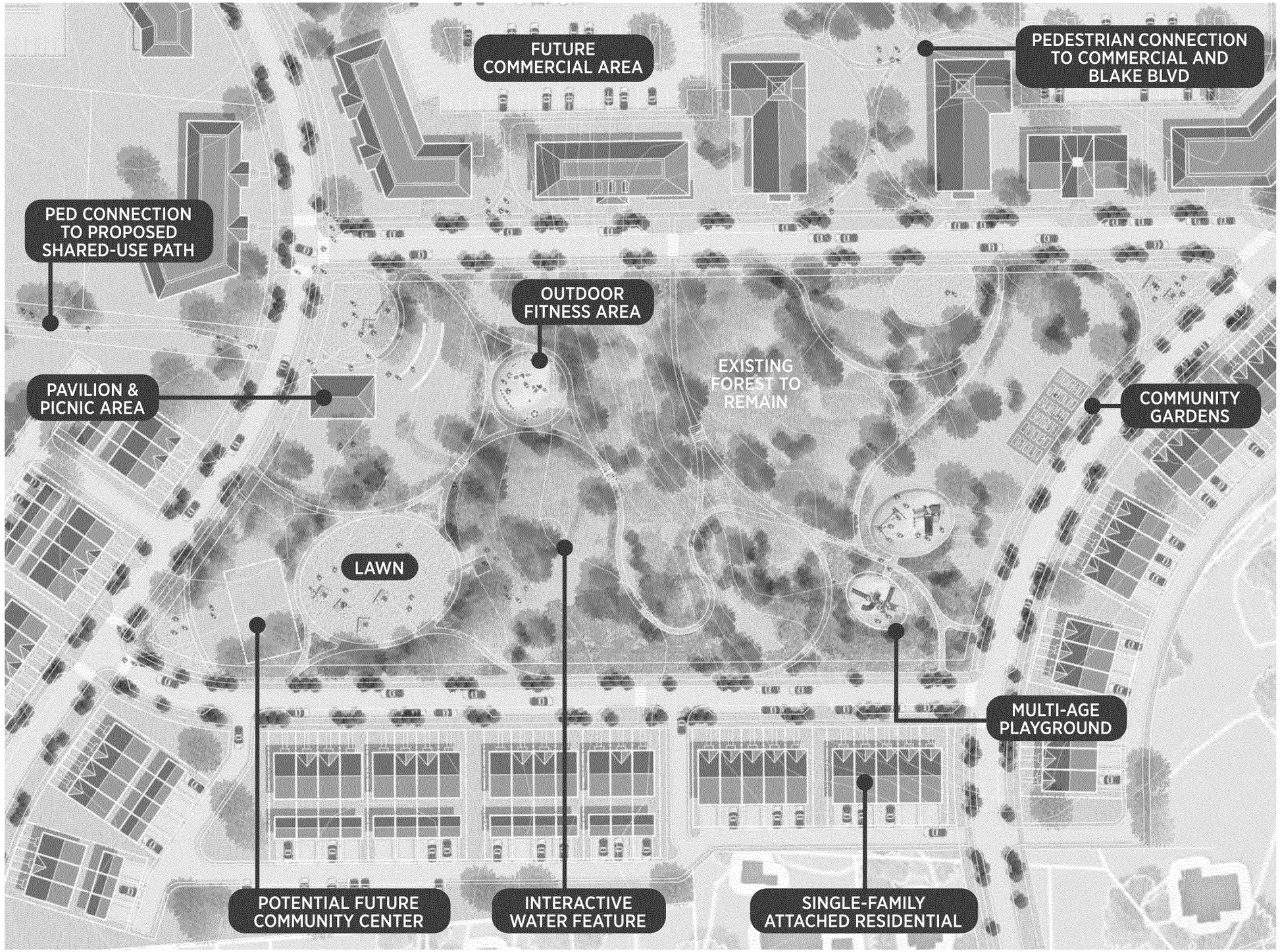
The Detail Plan illustrates a potential build-out of the area south of Blake Boulevard and north of Jackson Hamlet.

New mixed-use development surrounds a large Central Green that helps to preserve some of the existing topography and trees, This new open space serves both office tenants as well as neighborhood residents.

The new Central Green is shown with a pavilion, an interactive, meandering water feature fed by stormwater, community gardens, paths through a wooded area, disc golf, an exercise park, and a multi-age playground area. If desired, a community building could be built in the future in the lower southwest corner, where the historic Chalfonte Hotel used to stand.

KEY

- EXISTING BUILDINGS
- PROPOSED BUILDINGS
- PROPOSED BUILDINGS



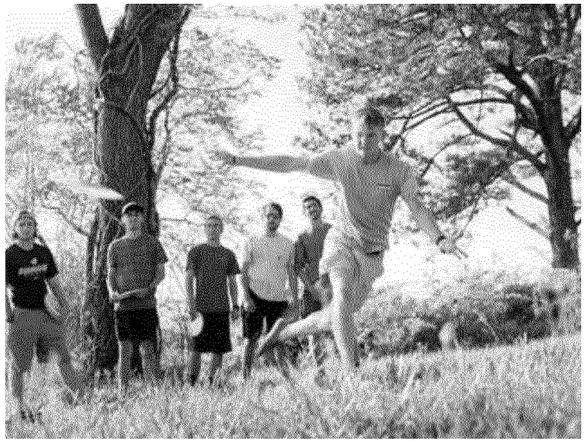
This plan is illustrative only and subject to change. Source: Design Collective, Inc.



Precedent - Pavilion
Credit: Design Collective



Precedent - Playground
Source: Greenworks SPC



Precedent - Disc Golf
Credit: Reinhardt University



Precedent - Community Garden
Source: Eiber Community Garden



Precedent - Intergenerational Fitness Park
Credit: Phil Bourne/Goric

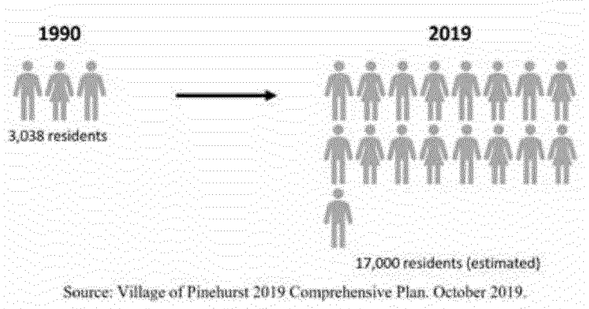


Precedent - Stormwater Management Water Feature
Credit: The Plant Hunter

Introduction

The Village of Pinehurst (Village) is a desirable community attracting new residents and businesses, and some Village residents are concerned about the impact of growth on the existing quality of life, particularly further vehicular traffic impacts.

In 2019, the Village of Pinehurst completed the "Envision the Village" community initiative to adopt the 2019 Comprehensive Plan. The 2019 Comprehensive Plan is an official guide for the future vision and policy framework for development in Pinehurst. The plan established five focus areas which represent the most important areas to influence, as development in these areas could have the most significant impact on shaping the future of Pinehurst. Two of the focus areas are being evaluated in deeper detail with this study: Village Place/Rattlesnake Trail Area and Pinehurst South/Highway 5 Commercial Area.



Source: Village of Pinehurst 2019 Comprehensive Plan. October 2019.

The Small Area Plan (SAP) effort recommends improvements to the Village Place/Rattlesnake Trail Area (hereafter referred to as Village Place) and Pinehurst South/Highway 5 Commercial Area (hereafter referred to as Pinehurst South) that will improve the transportation network while maintaining the future vision for the Village of Pinehurst. For Village Place, this study provides a plan to create a mixed-use, walkable area that connects Village Place/Rattlesnake Trail to the Village Center. For Pinehurst South, this study provides a plan to apply the planning principles of Tufts, Olmsted, and Manning to Pinehurst South while also providing connection to the Village Center via bicycle and pedestrian facilities to encourage reduced traffic on NC-5.

Pinehurst South

The following are the existing transportation conditions within the Pinehurst South/Highway 5 Commercial Area (hereafter referred to as Pinehurst South), projected traffic impacts of the proposed 50-year build-out development plan, planned transportation improvements along with recommended long-range transportation improvements. Recommendations apply the planning principles of Tufts, Olmsted, and Manning to Pinehurst South while also providing connection to the Village Center via bicycle and pedestrian facilities as well as support of long-range transportation plans which will provide an alternate route to NC-5.

Existing Transportation Infrastructure Conditions:

BEULAH HILL ROAD/HIGHWAY 5 (NC-5)

The dominant transportation feature in the Pinehurst South area is Beulah Hill Road/Highway 5 (NC-5). NC-5 is a major thoroughfare running north and south through the heart of the Village of Pinehurst, connecting NC 211 to the north with US 1 to the south through Aberdeen. The Aberdeen Carolina and Western Railway (ACWR) which runs parallel to NC-5, contributes to transportation access challenges, however; the ACWR is open to discussions about improvements within their right-of-way. Traffic congestion along NC-5 has long been a concern for the Village of Pinehurst community.

The NC-5 section running through the Pinehurst South study area is carrying over 20,000 vehicles per day (vpd) and operates as a class 2 arterial with a 35 MPH speed limit. Based on a planning level capacity analysis, NC-5 is operating at an average Level of Service (LOS) D during peak hours. Corridor Traffic Capacity is based on overall travel time/speed and is measured by levels of service ranging from LOS A (free-flowing, no delays) to LOS D (frequent stops and delays with overall travel speeds less than 10 MPH).

2020 PINEHURST NC 5 CORRIDOR TRAFFIC UPDATE

LEVEL OF SERVICE COMPARISON

Stop Sign Controlled Intersections - AM Peak Hour

	2005	2007	2009	2011	2013	2015	2018	2020
INTERSECTION	*EB-WB*	*EB-WB*	*EB-WB*	*EB-WB*	*EB-WB*	*EB-WB*	*EB-WB*	*EB-WB*
NC 5 @ McDonald W/E	C-C	C-B	D-D	D-C	C-C	C-B	C-C	C-C
NC 5 @ McKenzie W/E	D-D	D-D	E-D	E-C	D-C	D-C	E-C	E-C
NC 5 @ Barrett/McCaskill	C-C	D-E	E-F	C-D	C-D	C-C	C-D	C-C
NC 5 @ Linden/McLean	-	-	-	-	-	-	-	C-D
NC 5 @ Shaw SW/SE	-	-	-	-	-	-	-	D-B

Stop Sign Controlled Intersections - Noon Peak Hour

	2005	2007	2009	2011	2013	2015	2018	2020
INTERSECTION	*EB-WB*	*EB-WB*	*EB-WB*	*EB-WB*	*EB-WB*	*EB-WB*	*EB-WB*	*EB-WB*
NC 5 @ McDonald W/E	C-C	C-B	D-D	D-C	C-C	C-B	C-C	C-C

Stop Sign Controlled Intersections - PM Peak Hour

	2005	2007	2009	2011	2013	2015	2018	2020
INTERSECTION	*EB-WB*	*EB-WB*	*EB-WB*	*EB-WB*	*EB-WB*	*EB-WB*	*EB-WB*	*EB-WB*
NC 5 @ McDonald W/E	C-C	C-B	D-D	D-C	C-C	C-B	C-C	C-C
NC 5 @ McKenzie W/E	D-D	D-D	E-D	E-C	D-C	D-C	F-E	F-E
NC 5 @ Barrett/McCaskill	C-C	D-E	E-F	C-D	C-D	C-C	C-D	C-C
NC 5 @ Linden/McLean	-	-	-	-	-	-	-	E-D
NC 5 @ Shaw SW/SE	-	-	-	-	-	-	-	C-C

Signalized Intersections - AM Peak Hour

	2005	2007	2009	2011	2013	2015	2018	2020
INTERSECTION	*E/W-N/S*	*E/W-N/S*	*E/W-N/S*	*E/W-N/S*	*E/W-N/S*	*E/W-N/S*	*E/W-N/S*	*E/W-N/S*
NC 5 @ McKenzie W/Cherokee (NC 2)	C-C	C-B	D-D	D-C	C-C	C-B	C-C	C-C
NC 5 @ Morganton	D-D	D-D	E-D	E-C	D-C	D-C	E-C	C-C
NC 5 @ Lake Hills/Monticello	C-C	D-E	E-F	C-D	C-D	C-C	C-D	C-A
NC 5 @ Trotter/Blake	C	B	B	C	B	B	C-A	B-A

Signalized Intersections -Noon Peak Hour

	2005	2007	2009	2011	2013	2015	2018	2020
INTERSECTION	*E/W-N/S*	*E/W-N/S*	*E/W-N/S*	*E/W-N/S*	*E/W-N/S*	*E/W-N/S*	*E/W-N/S*	*E/W-N/S*
NC 5 @ Morganton	D-D	D-D	E-D	E-C	D-C	D-C	E-C	C-C
NC 5 @ Trotter/Blake	C	B	B	C	B	B	D-A	B-A

Signalized Intersections - PM Peak Hour

	2005	2007	2009	2011	2013	2015	2018	2020
INTERSECTION	*E/W-N/S*	*E/W-N/S*	*E/W-N/S*	*E/W-N/S*	*E/W-N/S*	*E/W-N/S*	*E/W-N/S*	*E/W-N/S*
NC 5 @ McKenzie W/Cherokee (NC 2)	C-C	C-B	D-D	D-C	C-C	C-B	C-C	C-C
NC 5 @ Morganton	D-D	D-D	E-D	E-C	D-C	D-C	E-C	C-C
NC 5 @ Lake Hills/Monticello	C-C	D-E	E-F	C-D	C-D	C-C	C-D	C-B
NC 5 @ Trotter/Blake	C	B	B	C	B	B	D-A	B-B

Source: Village of Pinehurst NC-5 Corridor, 2020 Traffic Update.

Starting in 2005, the Village of Pinehurst has conducted a biannual review of the major intersections along NC-5 from Trotter Drive/Blake Boulevard to McDonald Road. The table on the previous page provides a summary of the traffic volumes and capacity analysis from the Village of Pinehurst NC-5 Traffic Update Report, focusing on the intersections within the study area. Traffic Volumes have increased steadily along the NC-5 corridor and the (LOS) at these critical intersections has declined as indicated in the table below. The most congested signalized intersection is NC-5 at Morganton Road with a 2018 LOS E in both the morning (AM) and afternoon (PM) peak hours. The most congested non-signalized intersection is NC-5 at McKenzie Road with a LOS F in both the AM and PM peak hours.

In summary, based on a corridor planning level capacity analysis for a 2-lane class 2 arterial roadway carrying 20,000 vpd and the capacity analysis of the individual intersections, NC-5 is operating below capacity (LOS D) during AM and PM peak travel times where motorists experience travel speeds below 10 MPH and vehicle delays at critical intersections in excess of 45 seconds/vehicle during AM and PM peak travel times.

ABERDEEN CAROLINA AND WESTERN RAILWAY (ACWR)
The ACWR runs parallel to, and east of, NC-5 through the study area and carried 102 trains in 2020. The inbound trains carry feed for chicken farms and typically carry 90 cars while the return trains carry lumber, wood chips, aggregate, and rebar. The ACWR would like to increase train lengths to 110 cars and subsequently would like to close the at-grade rail crossing on Arnette Street. This closure would allow the longer trains to stop between Olivia Lane and Blake Boulevard without blocking vehicular traffic. To accommodate this closure, Olivia Lane would be upgraded to an NCDOT facility and become a full, potentially signalized, intersection at NC-5 with a connection to Arnette Street via Olivia Lane.

The at-grade rail crossing on Blake Boulevard sometimes experiences motorist stopping on the railroad track despite fully functioning gates and signage. More signage and/or enhanced pavement markings are recommended to reinforce the proper stopping location for motorist at this rail crossing.

GOLF CARTS
Golf carts are not allowed on NC-5 nor would they be allowed on the shared-use path. Improved golf cart access to this area would need to be established along residential streets where golf carts are allowed and by enhancing golf cart crossings on NC-5.

BICYCLE AND PEDESTRIAN
Bicycle and Pedestrian accommodations are lacking in the Pinehurst South Area as NC-5 lacks accommodations for these modes of travel and the local streets have been built without sidewalks. Currently, there are two NCDOT projects for NC-5 that will include sidewalks on the west side of NC-5 through the study area.

There is an opportunity for a 8- or 10- foot wide shared-use path (SUP) to be built along the east side of NC-5, enhancing bicycle and pedestrian mobility along this corridor as well as connecting Pinehurst South with the Village Center and Pinehurst Resort. Representatives from the ACWR Company, who owns the property right-of-way (ROW) to the east of NC-5, indicated that they would be open to allowing a shared-use path (SUP) within the railroad right-of-way through a program called “Rails with Trails”. The ACWR will be involved with the planning and design of any SUP within their ROW. The ACWR has expressed concerns about keeping users of any SUP completely separated from the railroad through physical barriers (fencing); however, they are open to the concept of coexisting with a SUP. To see a section of the proposed SUP, see page 62 of this document. Other recommended pedestrian & bicycle improvements in the Pinehurst South study area include sidewalk connections between existing and planned neighborhoods to provide connectivity between communities in the study area. To see the proposed pedestrian network, see page 60 of this document.



Precedent - Shared-Use Path
Source: Village of Pinehurst

Traffic Impacts of Pinehurst South Build-Out Plan

Based on the 50-year Build-Out Development Plan for the Pinehurst South Area, traffic was generated for the proposed new land uses based on the Institute of Transportation Engineers (ITE) trip generation manual, which is universally accepted by Traffic Engineers and Planners to project future traffic based on various land-uses. Traffic was generated for the two development options, Low Intensity and High Intensity, for the Pinehurst South study area. Also, traffic generation was split between proposed future development sites on the east side and the west side of NC-5.

TRIP GENERATION

As development is phased in over the next 50 years, there will be a total of about 11,349 new trips per day created by the Low Intensity development scenario to about 12,905 new trips per day created by the High Intensity scenario. See tables below for a summary of the total trips generated for these options.

Because the proposed development is a mixture of uses (residential, retail, restaurant), not all of these trips will result in actual new vehicle trips. Some of these trips will be absorbed by internal capture as patrons of the new shops may also decide to dine at one of the new establishments, thus eliminating a new vehicle trip. (these are known as “internal capture” trips). Also, as NC-5 is a heavily traveled major thoroughfare carrying about 20,000 vehicles per day (vpd), some of the vehicles already traveling on NC-5 are likely to be attracted to the new development as they pass-by on their way to other destinations and will not increase the total number of new vehicle trips (these are known as pass-by trips).

Based on internal capture and the pass-by trips, the total new vehicle trips per day will be reduced by about 30% . This trip reduction due to internal capture and pass-by trips is an accepted practice by Transportation Engineers and Planners. Based on the ITE Trip generation rates and pass-by/internal capture reduction of 30%, it is estimated that there will be an additional 7,944 vpd to 9,033 vpd on the surrounding street network.

TRIP DISTRIBUTION

It is estimated that about 80% of the new vehicle trips will originate from NC-5 and about 20% of the new vehicle trips will originate from the local street network which will be connected to the new development(s) in the Pinehurst South Area via new connections as illustrated in the future development plan. This will result in an increase of between 6,355 vpd to 7,266 vpd on NC-5 and an increase of 1,588 vpd to 1,806 vpd to the local street system, which will be split between the east side of NC-5 (60%) (953 to 1,084 vpd) and the west side of NC-5 (40%) (635 to 722 vpd)

TRAFFIC IMPACTS

The section of NC-5 running through the Pinehurst South study area is currently carrying around 20,000 VPD and is estimated to be operating at a LOS D with overall travel speeds at or below 10 MPH during peak travel times (based on planning level capacity analysis) with several of the intersections operating at or below LOS E with delays in excess of 45 seconds per vehicle during peak travel times (based on capacity analysis conducted by the Village).

Without intevention, improved connectivity, or mobility choice, the projected increase of 6,355 VPD to 7,266 VPD on this section of NC-5 over the next 50 years due to planned development in the Pinehurst South study area will further increase traffic congestion along this section of NC-5. However, mitigation measures should coincide with development and increased traffic will be gradual as new development is phased-in over the next 50 years. There are some planned roadway improvements and long-range transportation plans which will also help to off-set the impacts of this traffic growth (see the following page for more information).

Pinehurst South (EAST) Opt A - Low Intensity Scheme				
		Daily Trips (vpd)	**AM Peak Hour Trips (vph)**	**PM Peak Hour Trips (vph)**
North of Blake Blvd	Subarea A	2,974	179	248
	Subarea B	425	52	106
Subtotal		**3,399**	**231**	**354**
South of Blake Blvd	Subarea A	242	43	89
	Subarea B	1,465	216	186
	Subarea C	1,220	206	165
	Subarea D	325	44	96
	Subarea E	286	41	93
	Subarea F	78	5	7
	Subarea G	206	38	86
	Subarea H	280	5	26
	Subarea I	78	5	7
	Subarea J	148	5	13
Subtotal		**4,328**	**608**	**768**
TOTAL		**7,727**	**839**	**1,122**

Pinehurst South (EAST) Opt A - High Intensity Scheme				
		Daily Trips (vpd)	**AM Peak Hour Trips (vph)**	**PM Peak Hour Trips (vph)**
North of Blake Blvd	Subarea A	2,974	179	248
	Subarea B	626	103	129
Subtotal		3,600	282	377
South of Blake Blvd	Subarea A	402	69	106
	Subarea B	1,465	216	186
	Subarea C	1,220	206	165
	Subarea D	447	76	110
	Subarea E	399	68	106
	Subarea F	212	39	86
	Subarea G	206	38	86
	Subarea H	388	26	34
	Subarea I	78	5	7
	Subarea J	148	5	13
Subtotal		**4,965**	**748**	**899**
TOTAL		**8,565**	**1,030**	**1,276**

Note: To see the corresponding Low and High-Intensity Schemes, see pages 72-73 of this document.

Transportation Improvements

NCDOT has plans to make the following improvements to NC-5 starting in 2025:

STIP Project U-5756 – Widen NC-5 to five-lane section from US 1 to north of Turning Leaf Way and to a three-lane section from north of Turning Leaf Way to Trotter Drive/ Blake Boulevard. This improvement project will include the installation of a sidewalk along the west side of NC-5 from US 1 to Trotter Drive/Blake Boulevard.. U-5756 is currently under design with right-of-way acquisition scheduled for State fiscal year 2023 and construction to start in State fiscal year 2025.

STIP Project R-5892 – Make operational improvements (add turn-lanes and improve traffic signals) on NC-5 from Blake Boulevard/Trotter Drive to NC 211. A feasibility study is currently underway. A construction date has not been established for R-5892 and the project is currently unfunded in the State Transportation Improvement Plan (STIP)

Beyond these two State Projects, no additional roadway improvements are recommended to NC-5. NC-5 is the main travel corridor in the study area and is constrained by the ACWR which runs parallel to NC-5 on the east side, at some points less than 30 feet from the edge of existing pavement. Any further roadway expansion, beyond what NCDOT currently has planned, would likely result in negative impacts and relocations to the homes and businesses to the west of NC-5.

WESTERN CONNECTOR

The Village of Pinehurst Thoroughfare Plan and the Moore County Comprehensive Transportation Plan (CTP) include the "Western Connector" which could provide a new north-south highway around the Village Center. The western connector could provide an alternate route for through-trips(trucks) between US 1 and NC 211 and provide long term traffic relief which could liberate NC-5/ Beulah Hill Road for local travel. The "Western Connector" is on the long-range transportation plan and is conceptual at this stage, however; the benefits and costs need to be carefully evaluated for future prioritization.

PEDESTRIAN/BICYCLE IMPROVEMENTS

There is an opportunity for a 10-foot wide shared-use path (SUP) to be built along the east side of NC-5 in the ACWR right of way. The SUP would greatly enhance bicycle and pedestrian mobility along this corridor as well providing a vital connection between Pinehurst South and The Village Center. The ACWR Company has indicated that they would be open to allowing a SUP. Other recommended pedestrian & bicycle improvements in the Pinehurst South study area include sidewalk connections between existing and planned neighborhoods which would provide safe pedestrian connectivity between communities in the study area.

OTHER IMPROVEMENTS

- Recommended improvements to the SAP suggest providing better connections between existing and planned neighborhoods within the study area. Better local street connections can reduce traffic impacts to NC-5 by providing internal circulation and access to both existing and proposed developments.
- Enhanced cross-walks along NC-5 to delineate safe crossing locations and alert motorist to pedestrian, bicycle and golf cart crossings.
- Close the Arnette Street RR crossing and access to NC-5. To accommodate this closure, Olivia Lane would be upgraded to an NCDOT facility and become a full, potentially signalized, intersection at NC-5 with a connection to Arnette Street via Olivia Lane.
- More signage and/or enhanced pavement markings are recommended to reinforce the proper stopping location for motorist at this rail crossing.

Pinehurst South (WEST) Opt A - Low Intensity Scheme				
		Daily Trips (vpd)	**AM Peak Hour Trips (vph)**	**PM Peak Hour Trips (vph)**
	Subarea A	159	5	14
	Subarea B	316	15	29
	Subarea C	102	5	9
	Subarea D	234	16	21
	Subarea E	887	155	68
	Subarea F	269	5	25
	Subarea G	1,655	159	133
TOTAL		**3,622**	**360**	**299**

Pinehurst South (WEST) Opt A - High Intensity Scheme				
		Daily Trips (vpd)	**AM Peak Hour Trips (vph)**	**PM Peak Hour Trips (vph)**
	Subarea A	439	29	37
	Subarea B	586	39	48
	Subarea C	102	5	9
	Subarea D	234	16	21
	Subarea E	887	155	68
	Subarea F	269	5	25
	Subarea G	1,823	190	215
TOTAL		**4,340**	**439**	**423**

Note: To see the corresponding Low and High-Intensity Schemes, see pages 72-73 of this document.

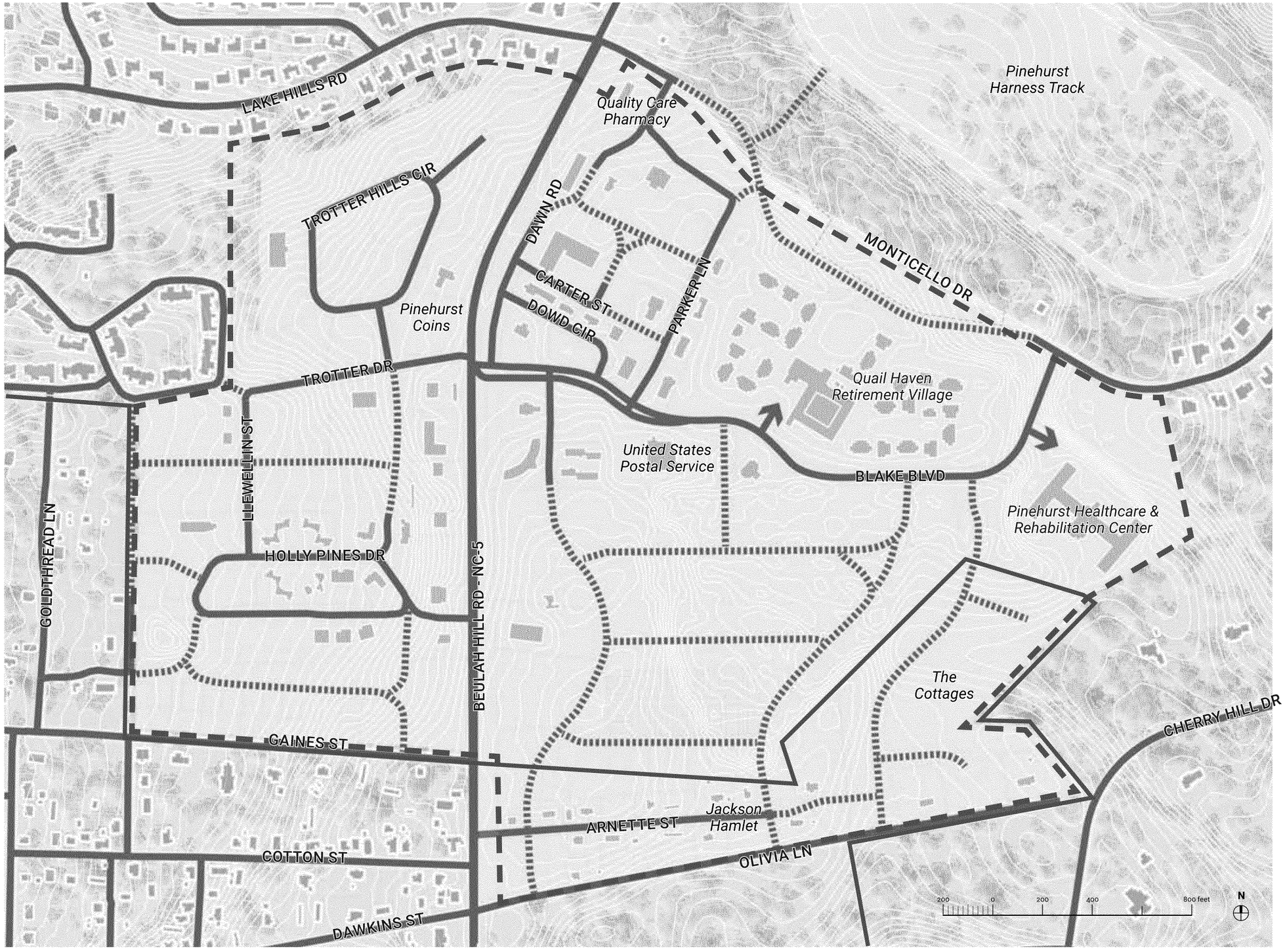
Proposed Circulation Plan

The proposed Circulation Plan for Pinehurst South emphasizes an improved, connected network of streets. This system will provide additional routes for vehicles (as well as for pedestrians, bicycles, and golf carts), thereby reducing traffic stress on any single street. The circulation recommendations include:

- Two new street connections from Olivia Lane to Blake Boulevard
- Realignment of Monticello Drive to accommodate the the potential relocation of the Public Service Facility south of the Harness Track
- Coordination with NCDOT planned improvements along NC-5
- The improvement of Olivia Lane as a full, signalized NC-5 intersection, connected to Arnette St. (to be closed to NC-5)
- Improved pedestrian, bicycle, and golf cart crossings of NC-5 with crosswalks added at signalized intersections

KEY

- SMALL AREA PLAN (SAP) BOUNDARY
- VILLAGE OF PINEHURST
- EXISTING STREETS
- PROPOSED STREETS
- PROPOSED ROAD CLOSURE



This plan is illustrative only and subject to change. Source: Design Collective, Inc.

Proposed Street Section
NC-5/Blake Boulevard

The proposed Street Section at the intersection of NC-5 and Blake Boulevard envisions improvements for pedestrians, bicycles, golf carts, and vehicles.

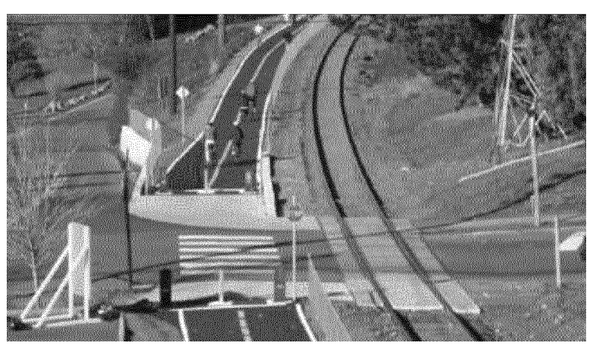
This proposed section coordinates with NCDOT planned improvements to add a sidewalk to the west side of NC-5. While a proposes Shared-Use Path (SUP) runs between the eastern edge of the roadway and ACWR rail line (suggested to be part of the Rails-to-Trail program). Where the path is close to the rail line, a physical barrier will be required. Motorized vehicles, including golf carts, should not be permitted on the path.

Crosswalks are added at signalized intersections to improve pedestrian, bicycle, and golf cart crossings of NC-5.

Buffers shall be provided along NC-5 where constraints allow, to provide a seamless "evergreen" landscape that is typical to Village of Pinehurst streetscapes.

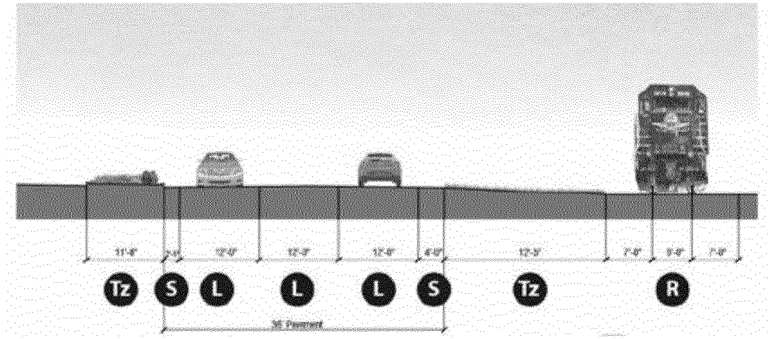
STREET SECTION KEY

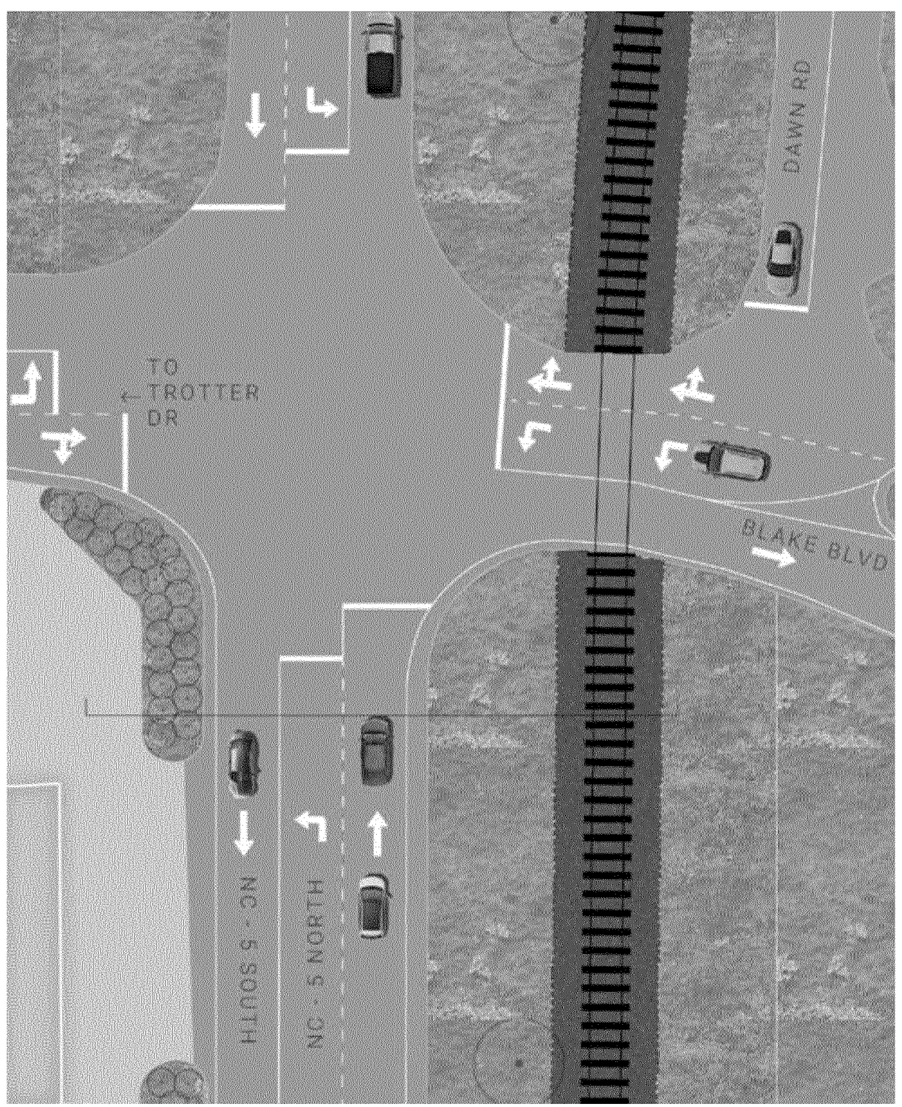
- **S** SHOULDER
- **PZ** PEDESTRIAN ZONE (SIDEWALK)
- **TZ** TREE ZONE (PLANTING STRIP)
- **SU** SHARED-USE PATH (BICYCLES & PEDESTRIANS)
- **L** TRAVEL LANES (VEHICULAR)
- **R** RAILROAD



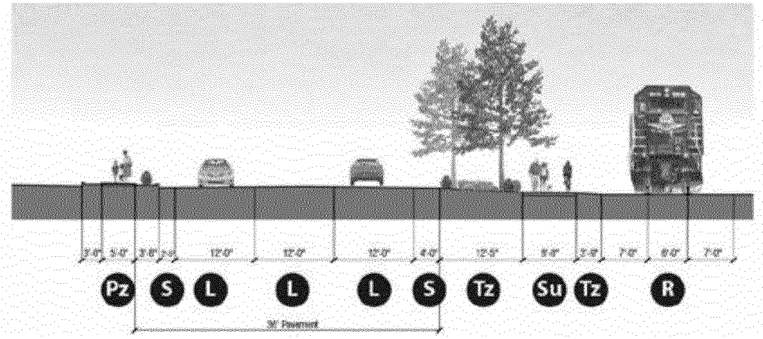
Precedent - Shared-Use Path
Source: Village of Pinehurst

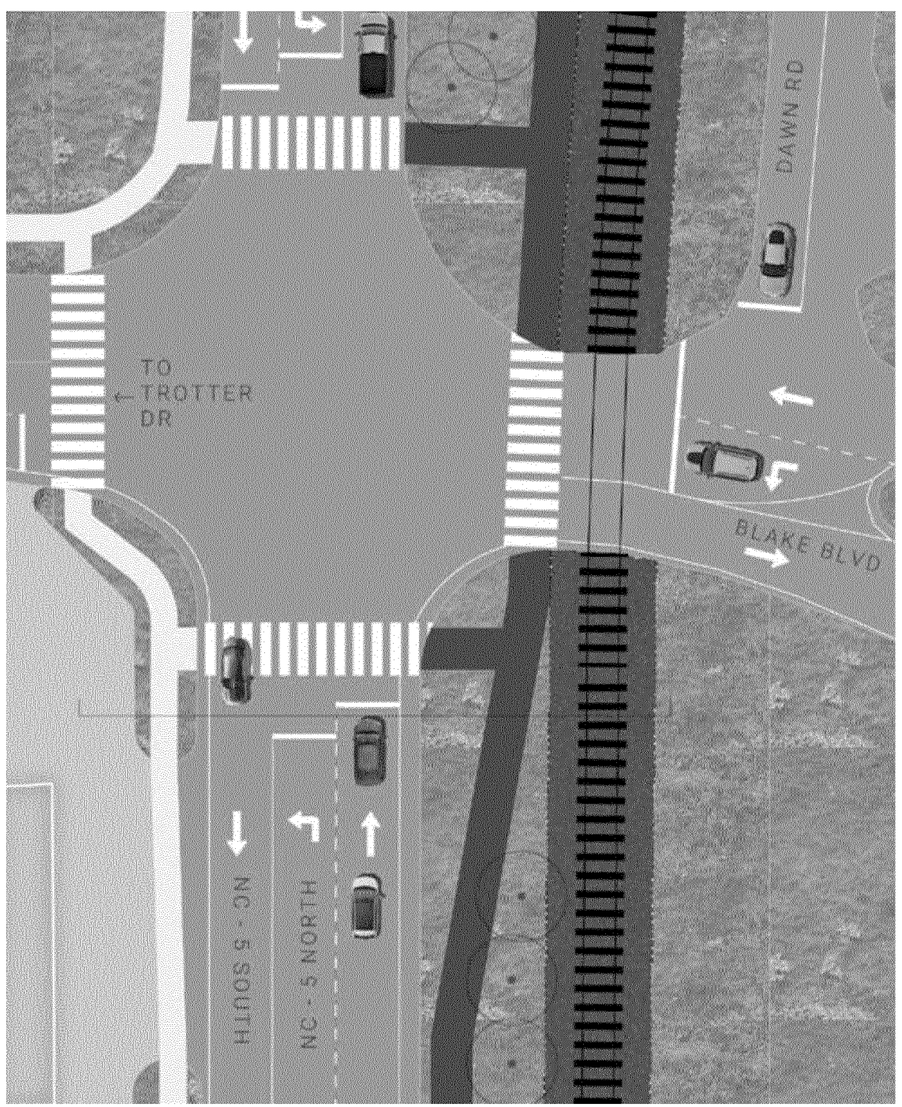
EXISTING





PROPOSED





Proposed Street Section - Typical Commercial

The Typical Commercial Street Section is a two-way, two-lane street with parallel parking; street trees and groundcover in stormwater management planters or tree pits; a 5' min. clear pedestrian zone; and a storefront zone for tables, chairs, potted plants, and displays.

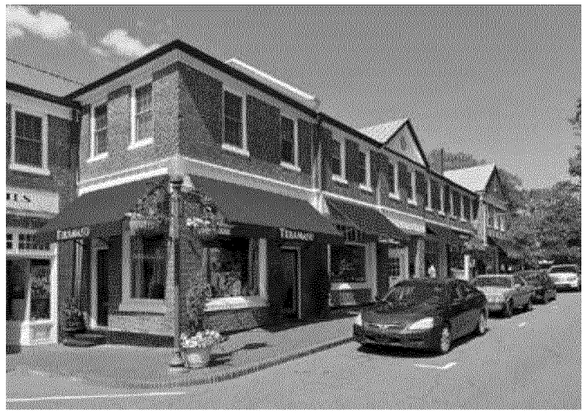
To reflect the character of Village Center, within the Pinehurst South area, brick sidewalks are required where buildings have commercial frontage.* The Village's standard benches and street lights shall also be incorporated.*

Parallel parking shall be incorporated on both sides of the street, where feasible, to provide additional parking spaces for patrons and visitors.*

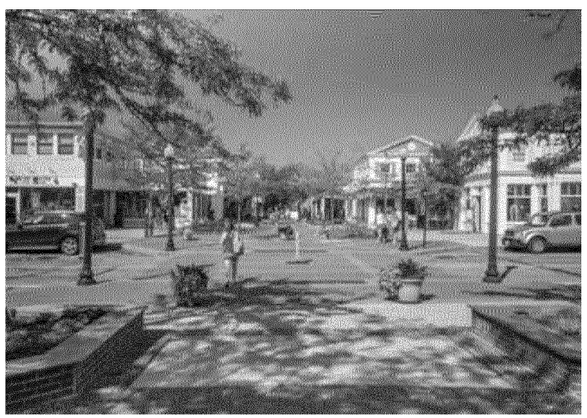
* For additional criteria and more information on frontage and setback requirements, see the *Pinehurst South Form-Based Code*.

STREET SECTION KEY

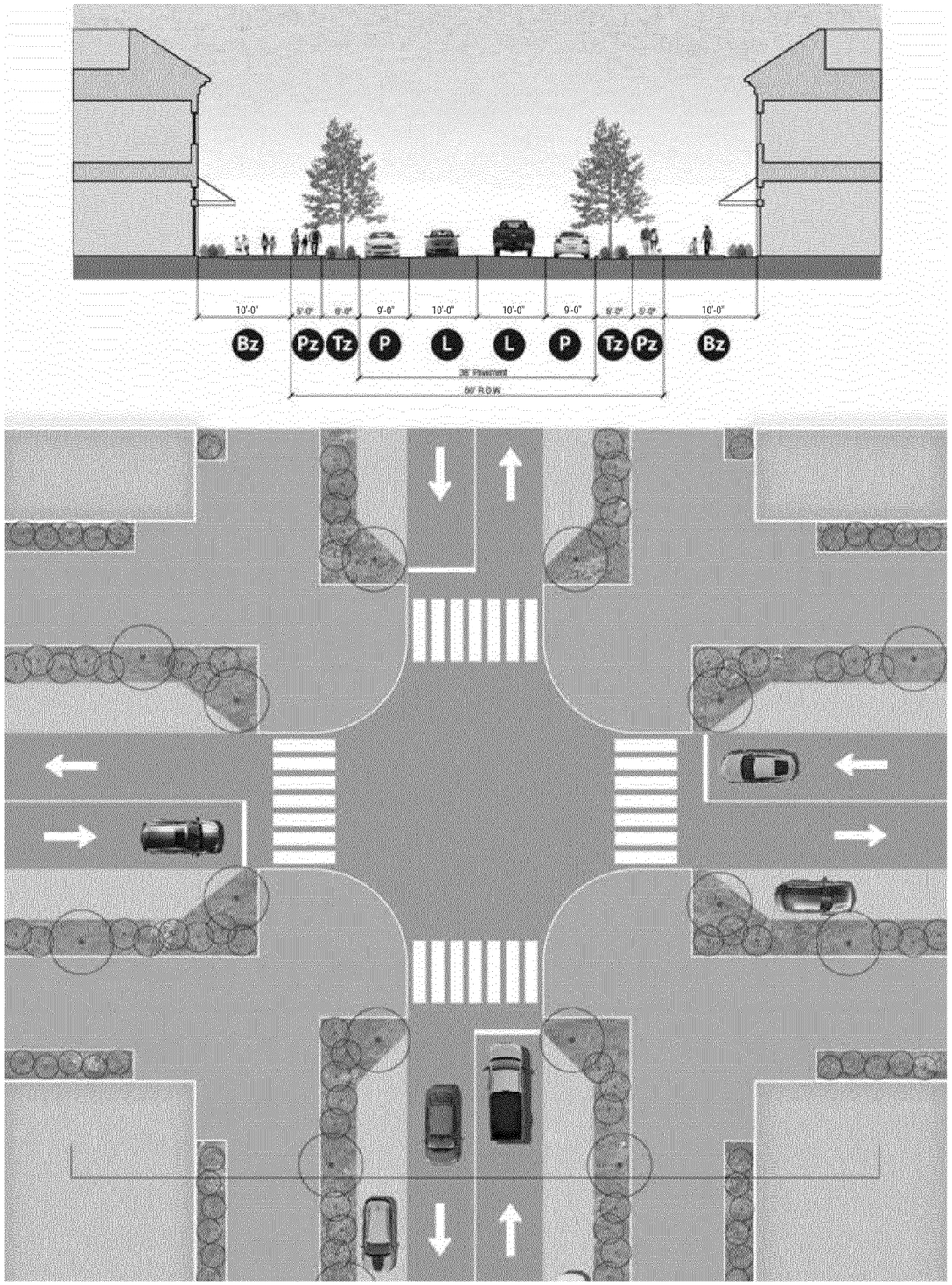
- **BZ** BUILDING ZONE
- **PZ** PEDESTRIAN ZONE (SIDEWALK)
- **TZ** TREE ZONE (PLANTING STRIP)
- **P** PARKING (PARALLEL)
- **L** TRAVEL LANES (VEHICULAR)



Mixed Use - Market Square, Pinehurst
Credit: VOP Rentals



Precedent - Mixed Use - Mashpee Commons, MA
Credit: PCA Design, Mashpee Commons, MA



Proposed Street Section - Typical Residential

The Typical Residential Street Section is a two-way, two-lane street with parallel parking; street trees and groundcover in stormwater management planters or tree lawns; and a 5' min. clear pedestrian zone.

In non-commercial areas, sidewalk material shall be specified as sand/clay, or concrete, as appropriate to context*.

Parallel parking shall be incorporated on both sides of the street, where feasible, to provide additional parking spaces for homeowners and visitors.*

* For additional criteria and more information on frontage and setback requirements, see the *Pinehurst South Form-Based Code*.

STREET SECTION KEY

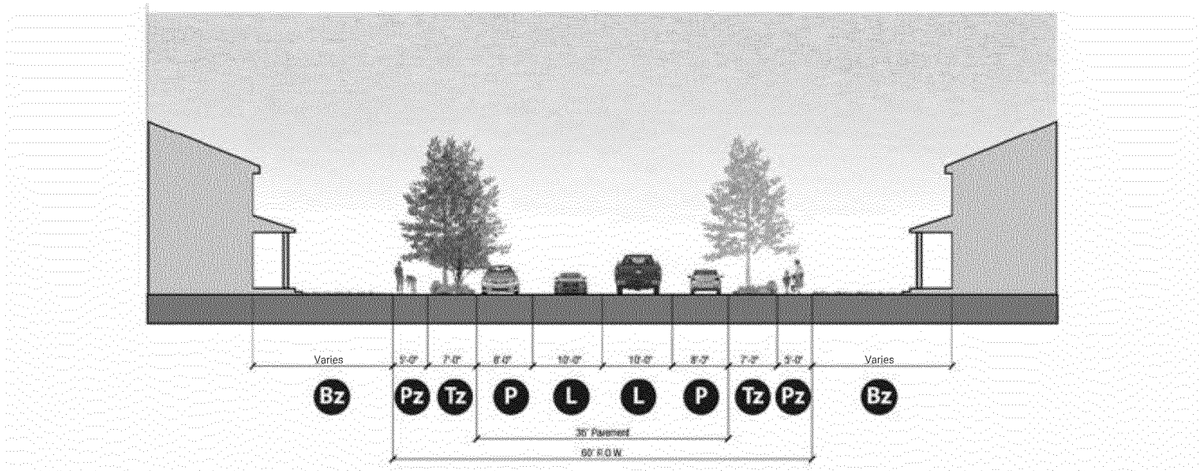
- BZ — BUILDING ZONE
- PZ — PEDESTRIAN ZONE (SIDEWALK)
- TZ — TREE ZONE (PLANTING STRIP)
- P — PARKING (PARALLEL)
- L — TRAVEL LANES (VEHICULAR)

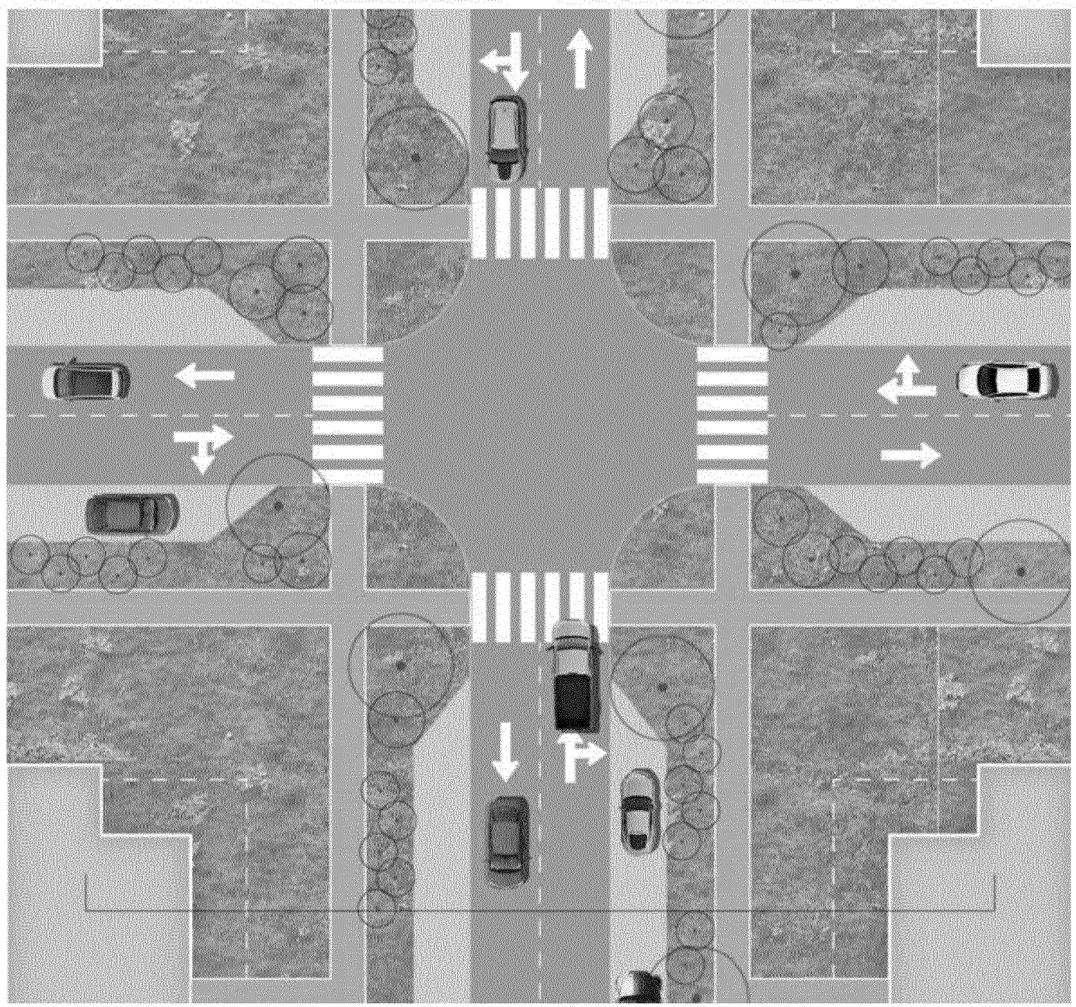


Precedent Residential Streetscape
Source: shortforkfarms.com



Precedent: Residential Streetscape - Kentlands, MD
Source: www.longandfoster.com





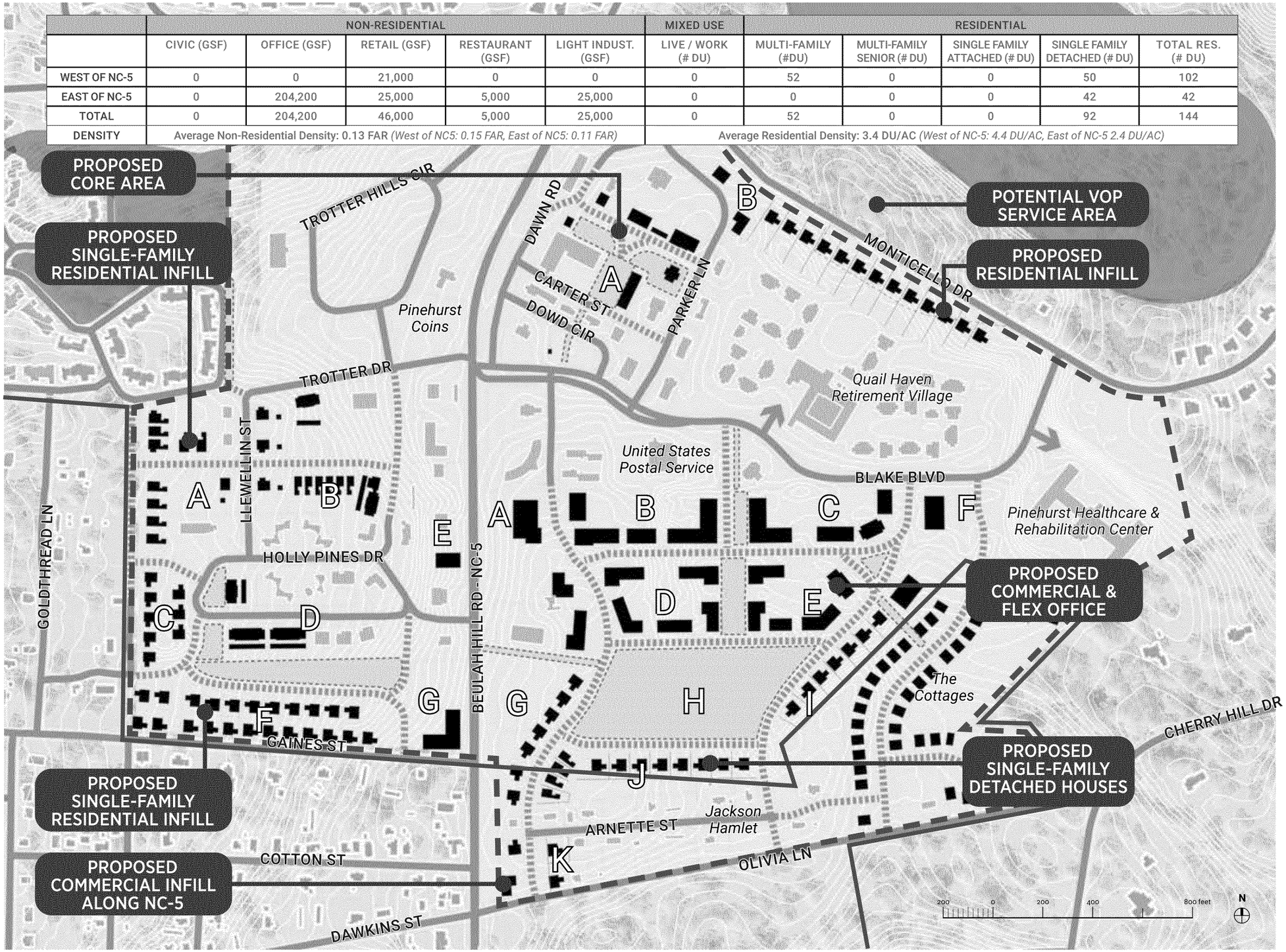
Build-Out Plan - Scenario 1 (low)

The Build-out Plan - Scenario 1 represents the cumulative efforts of the consultant team to create one potential, low intensity scenario of how the build-out of Pinehurst South may occur over the next 50+ years. This scenario is illustrative only and should not be considered the only option for this area. This build-out plan is based on the market demand and absorption rates per use, as projected by Duggal Real Estate Advisors (DREA). The *Pinehurst South Form-Based Code* (FBC) will regulate the character of development, in dimension, material, and detail - see that document for additional information.

This scenario shows the following:

- A core area is established between Monticello Dr. and Blake Blvd., east of NC-5
- To the south of Blake Blvd., a large Central Green creates a focal point for new, mixed-use development, serving as a space for activities and gathering and a transition to nearby residential
- Single-Family Detached (SFD) fronts three sides of this Green.
- On the west side of NC-5, SFD, Multi-family (MF), and small open spaces infill the residential areas, while commercial infill fronts NC-5.

	NON-RESIDENTIAL					MIXED USE	RESIDENTIAL				
	CIVIC (GSF)	OFFICE (GSF)	RETAIL (GSF)	RESTAURANT (GSF)	LIGHT INDUST. (GSF)	LIVE / WORK (# DU)	MULTI-FAMILY (#DU)	MULTI-FAMILY SENIOR (# DU)	SINGLE FAMILY ATTACHED (# DU)	SINGLE FAMILY DETACHED (# DU)	TOTAL RES. (# DU)
WEST OF NC-5	0	0	21,000	0	0	0	52	0	0	50	102
EAST OF NC-5	0	204,200	25,000	5,000	25,000	0	0	0	0	42	42
TOTAL	0	204,200	46,000	5,000	25,000	0	52	0	0	92	144
DENSITY	Average Non-Residential Density: 0.13 FAR *(West of NC5: 0.15 FAR, East of NC5: 0.11 FAR)*					Average Residential Density: 3.4 DU/AC *(West of NC-5: 4.4 DU/AC, East of NC-5 2.4 DU/AC)*					



This plan is illustrative only and subject to change. Source: Design Collective, Inc.

Build-Out Plan - Scenario 2 (high)

The Build-out Plan - Scenario 2 represents the cumulative efforts of the consultant team to create an alternative, marginally higher intensity potential scenario of how the build-out of Pinehurst South may occur over the next 50+ years. As with the low intensity scenario, this scenario is illustrative only and should not be considered the only option for this area. This build-out plan is based on the market demand and absorption rates per use, as projected by Duggal Real Estate Advisors (DREA). The *Pinehurst South Form-Based Code* (FBC) will regulate the character of development, in dimension, material, and detail - see that document for additional information.

This scenario shows the following:

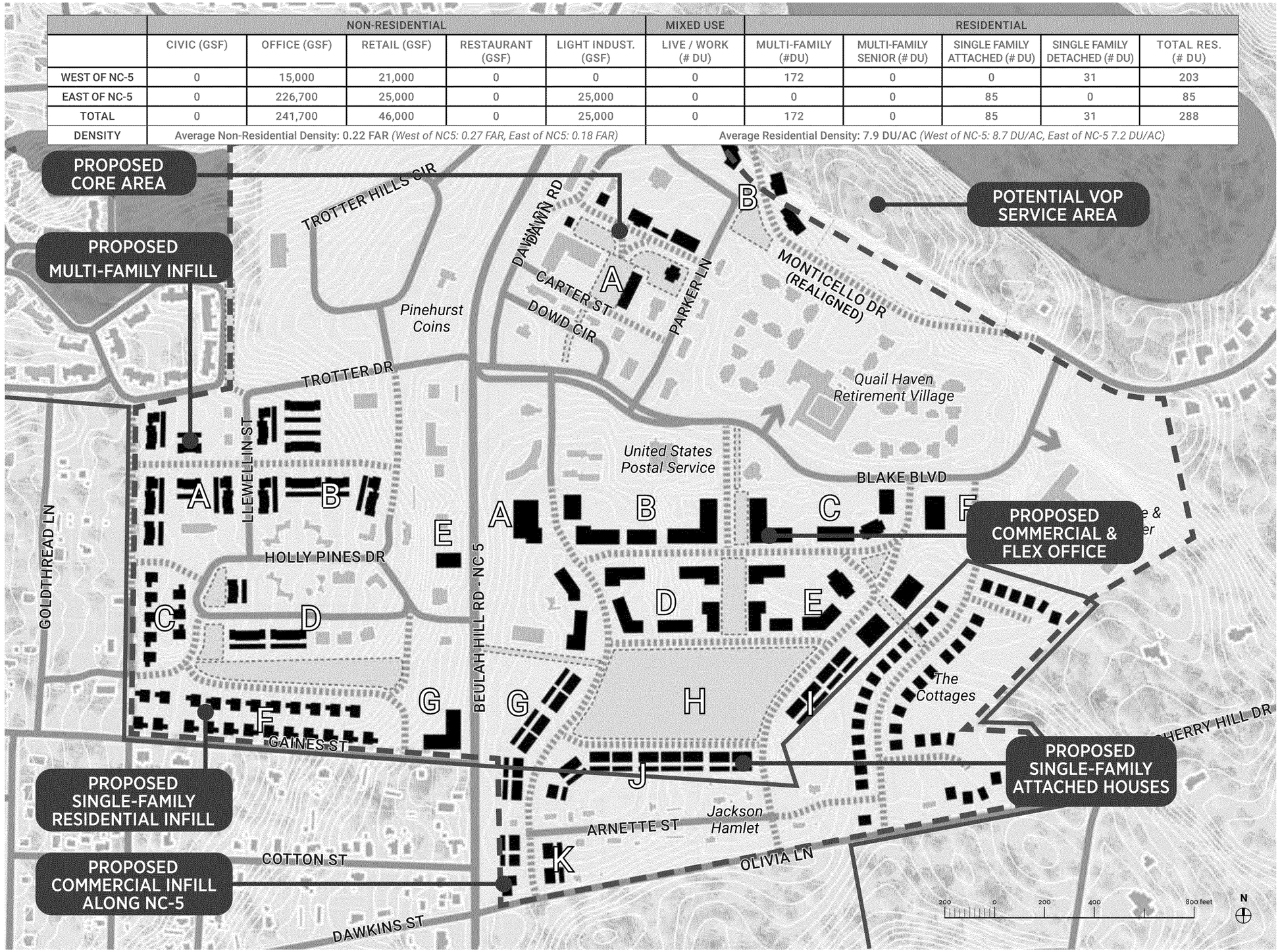
» A core area is established between Monticello Dr. and Blake Blvd., east of NC-5

» To the south of Blake Blvd., a large Central Green creates a focal point for new, mixed-use development, serving as a space for activities and gathering and a transition to nearby residential

» Single-Family Attached (SFA) fronts three sides of this Green.

» On the west side of NC-5, SFD, SFA, Multi-family (MF), and small open spaces infill the residential areas, while commercial infill fronts NC-5.

	NON-RESIDENTIAL					MIXED USE	RESIDENTIAL				
	CIVIC (GSF)	OFFICE (GSF)	RETAIL (GSF)	RESTAURANT (GSF)	LIGHT INDUST. (GSF)	LIVE / WORK (# DU)	MULTI-FAMILY (#DU)	MULTI-FAMILY SENIOR (# DU)	SINGLE FAMILY ATTACHED (# DU)	SINGLE FAMILY DETACHED (# DU)	TOTAL RES. (# DU)
WEST OF NC-5	0	15,000	21,000	0	0	0	172	0	0	31	203
EAST OF NC-5	0	226,700	25,000	0	25,000	0	0	0	85	0	85
TOTAL	0	241,700	46,000	0	25,000	0	172	0	85	31	288
DENSITY	Average Non-Residential Density: 0.22 FAR *(West of NC5: 0.27 FAR, East of NC5: 0.18 FAR)*					Average Residential Density: 7.9 DU/AC *(West of NC-5: 8.7 DU/AC, East of NC-5 7.2 DU/AC)*					



KEY

- VILLAGE OF PINEHURST
- SMALL AREA PLAN BOUNDARY
- EXISTING ROADS
- PROPOSED ROADS
- EXISTING PARKS/OPEN SPACE
- PROPOSED PARKS/OPEN SPACE
- A SUBAREA LABEL

Proposed Concept Plan - Phasing

Using the Market Analysis demand summary (shown in the charts to the right), the consultant team projected the potential timeframes of the proposed Pinehurst South Build-Out plan. The resulting Absorption Plan (on the following page) illustrates these timeframes. As with the Build-Out Plans, this absorption scenario is illustrative only and should not be considered the only option for this area, particularly considering that it can only occur as private and public property owners express interest in redeveloping or selling their parcels.

Civic
Civic uses were not analyzed as part of the Market Analysis and will be determined and developed as needed by the Village.

Residential
The Market Analysis displayed a high demand for residential; therefore, the potential for residential building in Pinehurst South is likely to be as soon as the next 0-10 years. The amount of residential shown in the Build-Out Plans is much less than the demand, as a result of feedback to consultants by Village staff and representatives.

Office
The amount of Office in the Build-Out Plans exceeds the current demand for this use in Pinehurst South. Therefore, while up to 5,000 SF/year is projected, it will take 50+ years to develop the program shown on these plans. Office north of Blake Boulevard should be prioritized over areas to the south in order to activate the proposed core area north of Blake.

Retail/Hospitality
The amount of retail proposed in the Build-Out Plans represents the full build-out potential for Pinehurst South. The build-out of this plan would likely take 10+ years as the demand potential is currently 20-25,000 SF every five years. The demand for retail will likely be higher where access to NC-5 is more direct, therefore retail near the new mixed-use core should be prioritized. This plan does not include hospitality as this use was seen as more appropriate near the Village Center

Golf courses were not included as part of the proposed plan for Pinehurst South, however, golf-related retail and light industry were seen as viable and are included within those use categories.

SUMMARY OF MARKET OPPORTUNITY

Land Use	Overall Market Opportunity	Village Place	Pinehurst South
For-Sale Residential	✓✓✓✓✓	✓✓✓✓	✓✓✓✓
For-Rent Residential	✓✓✓	✓✓✓	✓✓✓
Retail	✓✓✓✓	✓✓✓	✓✓✓
Office	✓✓	✓✓	✓✓
Hospitality	✓✓✓	✓✓✓	✓✓✓
Golf	✓✓	O	✓

Key: XXXXX = best, X = worst, O = none

SUMMARY OF DEMAND

Land Use	Demand Potential	Locations within Pinehurst
For-Sale Residential	80-120 homes/year	Almost anywhere
For-Rent Residential	15-25 units/year	Major roads, VP, PS, Village Cntr
Retail	20-25,000 SF/ every 5 years	Major roads, VP, PS, Village Cntr
Office	Up to 5,000 SF/year	Medical area, VP, PS, Village Cntr
Hospitality	25 rooms/yr. in Moore Co.	Resort, Village Cntr, PS, VP
Golf	2-3 courses over the next 10 years in Moore Co.	Focus Area 1 is the only area with space

For additional information regarding the Market Analysis summary, see Section 2.3 of this document.

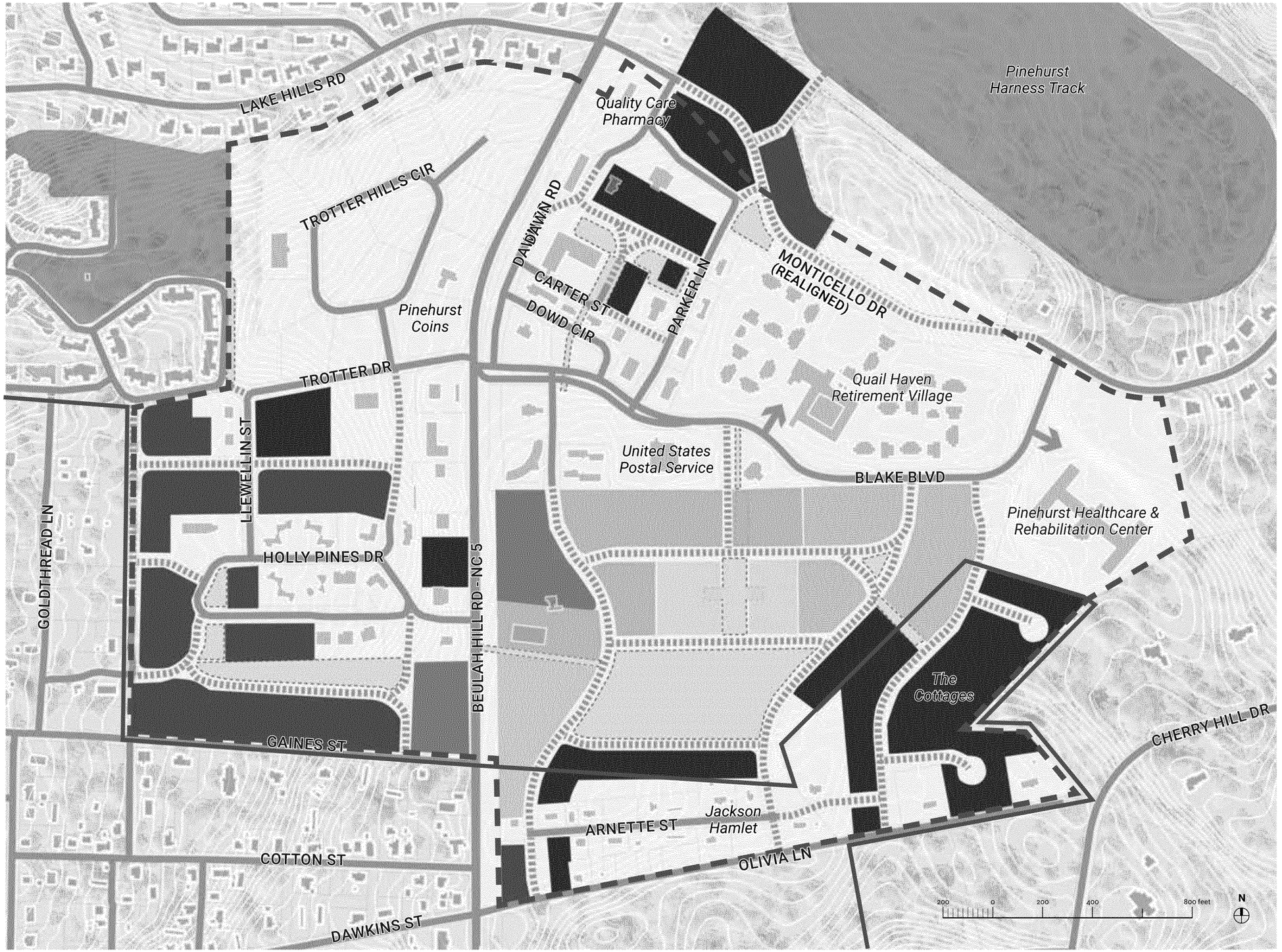
SUMMARY OF DEMAND FOR LAND USE WITHIN PLANNING AREAS

Land Use	Pinehurst South
For-Sale Residential	Unlimited (up to build-out capacity) 1 project would sell approximately 15-25 homes per year
For-Rent Residential	1-2 projects of up to 200 units each, depending on the location Timing depends on where else apartments have been constructed
Retail	Up to 80,000 SF with grocery, 40,000 SF without grocery
Office	Up to 100,000 SF Limited amount per year. 5,000 SF total in Village. Pinehurst South could capture some of that. Could increase, depending on impact of USGA
Hospitality	1 hotel with approximately 100 rooms
Golf	Possibly some support functions (although the land probably has a higher and better use than maintence for golf)

Phasing Absorption Plan

In coordination with the Market Analysis, the consultant team developed a potential Absorption Plan to demonstrate the absorption potential based on demand projections (see the previous page for more information).

The Absorption Plan is based on Build-out Plan - Scenario 2, which can be found on page 73 of this document. However, due to slow absorption rate of Office and Retail and the relatively fast absorption rate of Residential, the absorption durations of Scenario 1 and Scenario 2 would be anticipated to be similar.



This plan is illustrative only and subject to change. Source: Design Collective, Inc.

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5.0 IMPLEMENATION

5.1 OVERVIEW

5.2 FISCAL ANALYSIS

5.1 OVERVIEW

[Implementation summary to be included in final report]

Introduction

When new development occurs within the Village of Pinehurst, it brings both new revenues to the Village (primarily in the form of new taxes) and new costs to the Village (in terms of services such as fire protection and police as well as new infrastructure such as roads or sewers). Therefore, an important component to understand the implications of the Small Area Plans (SAPs) is to understand the revenue and costs to the Village of added services and infrastructure based upon future potential plans. This analysis is called a Fiscal Impact Analysis.

To determine the revenue and the costs of added service and infrastructure on the Preferred Build-Out Plans for Village Place and Pinehurst South, the team utilized the **FY 2017 Land Use Fiscal Analysis** completed by the Village of Pinehurst in October 2017. This document provided a net fiscal impact of various types of development in the Village of Pinehurst. These are expressed either as a net surplus or net deficit per acre by land use type. Please see the callout box for important assumptions made in the original document. In addition, refer to the original **FY 2017 Land Use Fiscal Analysis** for the full explanation of methodology and assumptions used to determine the net fiscal impact of different land uses by acre.

One of the major findings for the Village was that the analysis indicated that residential land uses generate more net revenue for the Village than non-residential uses. This is due in large part to the fact that the majority of revenues in the Village are from property taxes and that retail sales tax distributions occur on a per capita basis (as opposed to retail square footage or number of businesses). WThey also noted that certain assumptions about gated communities had a significant impact on the Single Family – Medium Density land use since the communities have security and maintain their own roads. In addition, assumptions regarding vacancy (16% for single-family and 68% for multifamily) had a large impact on the results. Finally, some Multi-family developments do not use the Village's solid waste services and instead contract with a private hauler which impacts costs. It was noted that for future development, Village leaders should consider variables such as private security, private roads, and solid waste collection to determine the true cost of any future residential development.

Results of Fiscal Impact Analysis

Based upon the results of the analysis, utilizing the assumptions as described herein, the Small Area Plans could have the following annual impact on the Village of Pinehurst at build-out (e.g. when the plan is completely built):

- Village Place Preferred Program: -$40,003 estimated total annual impact
- Pinehurst South Program Low: -$32,192 estimated total annual impact
- Pinehurst South Program High: -$18,313 estimated total annual impact

The commercial and the residential land uses in the plans balance each other out to help bring the net fiscal impact fairly close to zero. As noted above, residential land uses have a positive net fiscal impact on the VOP (e.g. more residential in the plans creates more revenue) and commercial land uses have a negative impact on the net fiscal impact (e.g. more commercial in the plans creates less revenue).

Fiscal Impact Assumptions and Methodology

In order to complete the analysis, we utilized the following assumptions:

- We utilized the assumptions regarding surplus or deficit by acre without any changes from the 2017 report. As noted above, this could make some residential land uses appear more beneficial than they are since the SAPs do not contemplate gated communities and for the other various reasons noted above.
- We fit the land use categories from the current SAPs into those land use categories from the 2017 report.

Figure 2 on page 80 outlines how the current land use categories in the SAPs compare to the FY 2017 document.

The next step was to determine the likely acreage associated with the SAPs as the FY document reported the surplus and deficit by acreage. The proposed density is similar to the existing density in the Village Center. The calculations to determine density by land use were completed on a gross net basis, based on typical average lots, plus the minimum required open space at 8%, half the right-of-way, and half the alley, if applicable. The following Figure 3 includes the estimated density of the products by land use that were then used to determine acreage in the SAPs.

Figures 5 and 6 on page 81 are the calculations for each of the potential programs.

Page 1, FY 2017 Land Use Fiscal Analysis

"The 2017 Village of Pinehurst Land Use Fiscal Analysis was prepared by Village staff to determine the approximate net revenues or net expenditures of various land uses within the Village of Pinehurst corporate limits. Properties included in the Village's extra-territorial jurisdiction (ETJ) were not included in this analysis. This land use fiscal analysis was prepared using FY 2017 data and represents an estimate of current revenues and expenditures by land use for that period of time.

This analysis provides revenue and expenditure allocation principals that can be applied to any proposed future development to estimate the financial impact. It is not a perfect predictor of the financial impacts of future development because the impacts of future land uses will vary on a case by case basis. The actual revenues and expenditures generated by one acre of land can vary within the same land use type due to many variables. Therefore, the information contained in this analysis should be used to provide an approximation of the estimated net revenue or cost of development, recognizing the actual revenue and costs associated with any one particular development will likely not be the exact amounts shown in this report."

Figure 1: Land Uses from FY 2017 Land Use Fiscal Analysis Report and Net Impact Per Acre

Land use	Description	Net Annual Surplus (Deficit) Per Acre
Single Family – Low Density	R210: 5 acre lot/ 2,000 SF min	$520
Single Family – Medium Density	R-30: 30,000 SF lot/ 2,000 SF min R-20: 20,000 SF lot/ 2,000 SF min R-15: 15,000 SF lot/ 1,800 SF min	$1,054
Single Family – High Density	R-10: 10,000 SF lot/ 1,800 SF min R-8: 8,000 SF lot/ 1,500 SF min	$806
Multi-family Development	Density varies by zoning jurisdiction	$1,597
Office	General office, medical/dental office, government office, post office	($3,109)
Retail	Retail, car dealership, drugstore	($8,518)
Lodging	Hotel	($2,110)
Recreational	Park, marina, golf course, harness track, tennis facility, fitness center	$52
Institutional	School, church, library	($6,622)
Medical	Hospital, nursing home, clinics	($6,995)
Industrial	Utilities, manufacturing, warehousing	($110)
Services	Bank, real estate office, restaurant, gas station	($3,230)

Figure 2: Land Uses from SAPs Compared to FY 2017 Report

Land Use in SAP	Corresponding Land Use in FY 2017 Report
Civic	Institutional
Office	Office
Retail/Restaurant	40% Retail, 60% Services
Hotel	Lodging
Light Industrial	Industrial
Live / Work	Multi-Family Dev.
Multi-Family	Multi-Family Dev.
Multi-Family Senior	Multi-Family Dev.
Single-Family Attached	Multi-Family Dev.
Single-Family Detached	Single-Family - High Density

Figure 3: Estimated Density by Land Use to Determine Acreage in SAPs

Land Use	FAR*/Dwelling Unit (DU)/Key Per Acre
Civic	1.00
Office	0.50
Retail/Restaurant	0.33
Hotel	50
Light Industrial	0.25
Live / Work	12
Multi-Family	18
Multi-Family Senior	25
Single-Family Attached	10
Single-Family Detached	5.5

* Floor Area Ratio (FAR) is the measurement of a building's total amount of usable floor area in relation to the total area of the lot on which the building stands.

Figure 5: Pinehurst South Low Program Calculations

	Non-Residential					Mixed-Use	Residential				
Land Use in SAP	**Civic (GSF)**	**Office (GSF)**	**Retail/ Restaurant (GSF)**	**Hotel (Keys)**	**Light Indust. (GSF)**	**Live / Work (# DU)**	**Multi-Family (#DU)**	**Multi-Family Senior (#DU)**	**Single-Family Attached (#DU)**	**Single-Family Detached (#DU)**	**Total Program**
Pinehurst South Program Low											
W of NC 5	0	0	21,000	0	0	0	52	0	0	50	
E of NC 5	0	204,200	30,000	50	25,000	0	0	0	0	42	
Total	0	204,200	51,000	50	25,000	0	52	0	0	92	
Pinehurst South Program Low in Acres											
W of NC 5	0.0	0.0	1.4	0.0	0.0	0.0	2.9	0.0	0.0	9.1	13.4
E of NC 5	0.0	9.4	2.1	1.0	2.3	0.0	0.0	0.0	0.0	7.6	22.4
Total	0.0	9.4	3.5	1.0	2.3	0.0	2.9	0.0	0.0	16.7	35.8
Pinehurst South Low Annual Revenue (Deficit) By Land Use											
W of NC 5	$0	$0	-$7,732	$0	$0	$0	$4,614	$0	$0	$7,327	$4,209
E of NC 5	$0	-$29,149	-$11,045	-$2,110	-$253	$0	$0	$0	$0	$6,155	-$36,402
Total	$0	-$29,149	-$18,777	-$2,110	-$253	$0	$4,614	$0	$0	$13,482	-$32,192

Figure 6: Pinehurst South High Program Calculations`

	Non-Residential					Mixed-Use	Residential				
Land Use in SAP	**Civic (GSF)**	**Office (GSF)**	**Retail (GSF)**	**Hotel (Keys)**	**Light Indust. (GSF)**	**Live / Work (# DU)**	**Multi-Family (#DU)**	**Multi-Family Senior (#DU)**	**Single-Family Attached (#DU)**	**Single-Family Detached (#DU)**	**Total Program**
Pinehurst South Program High											
W of NC 5	0	15,000	21,000	0	0	0	172	0	0	31	
E of NC 5	0	226,700	25,000	0	25,000	0	0	0	85	0	
Total	0	241,700	46,000	0	25,000	0	172	0	85	31	
Pinehurst South Program High in Acres											
W of NC 5	0.0	0.7	1.4	0.0	0.0	0.0	9.6	0.0	0.0	5.6	17.3
E of NC 5	0.0	10.4	1.7	0.0	2.3	0.0	0.0	0.0	8.5	0.0	22.9
Total	0.0	11.1	3.2	0.0	2.3	0.0	9.6	0.0	8.5	5.6	40.3
Pinehurst South High Annual Revenue (Deficit) By Land Use											
W of NC 5	$0	-$2,141	-$7,732	$0	$0	$0	$15,260	$0	$0	$4,543	$9,930
E of NC 5	$0	-$32,360	-$9,204	$0	-$253	$0	$0	$0	$13,575	$0	-$28,243
Total	$0	-$34,502	-$16,936	$0	-$253	$0	$15,260	$0	$13,575	$4,543	-$18,313

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PLANNING AND INSPECTIONS DEPARTMENT STAFF REPORT

To: Planning and Zoning Board
From: Darryn Burich, Planning & Inspections Director
Alex Cameron, Planning Supervisor
Date: April 29, 2022
Subject: Staff Report for recommendation on the Small Area Plans for Village Place and Pinehurst South.

This staff memo will cover both Small Area Plans that will include a general background of the project as well as general description of Village Place and Pinehurst South. Staff provides recommendations at the end of the memo. The Planning and Zoning Board will be asked to take separate action on the plans and may consider recommending as is or provide recommendations for amending the plans. Any recommendations will have to be acted upon and approved by a majority of the Planning and Zoning Board members. Project materials can be found on the plan webpage located at www.engage.vopnc.org/smallareaplans.

Background:
The 2019 Comprehensive Plan contained land use recommendations for five specific "Focus Areas" of the Village and surrounding ETJ. The land use recommendations provided a vision for how those areas would develop, redevelop, or be preserved over the course of the Comprehensive Plan's lifespan. Two of those Focus Areas, Focus Area 2 (Pinehurst South) and Focus Area 4 (Village Place) were specifically recommended to have individual Small Area Plans (SAPs) developed for each of the areas. In Fall of 2020, the Village engaged planning consultant Design Collective (DCI) to work with the Village to develop the two SAPs. Over the course of the past 1.5 years, DCI has worked with the Village to develop the SAPs to a point of moving forward to adoption.

The Planning and Zoning Board is being asked to provide recommendations on each of the SAPs that will be forwarded to Village Council for consideration and adoption. Recommendations should generally be confined to major plan recommendations versus minor edits or grammar within the documents. For example, proposed land uses or open spaces (or lack thereof) or circulation recommendations (streets, sidewalks, and paths) and so on are plan aspects that should be discussed and potentially acted upon by the Board. Minor edits can be handled separately.

An important consideration regarding the illustrations in the plans is that all illustrations are *illustrative* only and simply show a potential future and how these areas could look in the future *if* the plans are followed. The plans do not make the illustrations happen. They are "plans" and do not constitute regulatory actions. Plan implementation is generally followed by zoning updates and potentially land acquisition or disposition

(e.g. relocation of Public Services). For these plans to be implemented in any form, there need to be corresponding zoning updates adopted at a minimum. Prior to moving to that phase, there has to be general consensus regarding the plans themselves.

Another note regarding the illustrations, they show the long term build out of the areas over the next decades based on market absorption and there are significant differences between the two areas in that regard.

Village Place contains mostly developed properties with many located on smaller parcels in different ownership. This condition will likely complicate future plan development and lengthen out the build out or redevelopment of the area. Pinehurst South on the other hand does have a number of larger vacant parcels that can more easily be developed in the shorter term. There are still market absorption rates that will impact development so that build out scenario could lessen depending on the land use.

Each of the plans contain two different planning scenarios (low and high) and in the case of Village Place a preferred build-out plan. Those scenarios evolved over the course of the planning period and are retained in the plans to show what was previously considered and how that changed in the final plan sets. The SAPs do not implement either scenario. Plan land uses were guided in part by the Market Analysis, which can be found on the project webpage.

Please see the SAPs (in Novus or on project webpage) for more information regarding plan recommendations.

Village Place

Located just north of the Village Center, Village Place is approximately 100 acres and is characterized by a mix of developed and under-utilized properties. Many of the properties were developed prior to adoption of the Pinehurst Development Ordinance creating various nonconformities and many structures appear to be nearing the ends of their useful lives which may lead to future redevelopment as the community continues to experience growth demands.

The majority of the Village Place planning area is zoned Village Mixed-Use or Neighborhood Commercial. The area is well connected to adjacent neighborhoods and regional arterial roads (NC 211, NC 5, and Midland Road) via public streets and some with sidewalks. Much of the area is also located in the Historic District where the Historic Standards also apply to development activity and require issues of Major or Minor Certificates of Appropriateness as applicable.

The 2019 Comprehensive Plan vision for Village Place is to create a more mixed-use, walkable area that is better connected to the Village Center. Village Place offers a unique opportunity to expand the footprint of Pinehurst's historic center in the planning area.

The Plan builds upon the strengths of the existing conditions; the planning principles of the Tufts, Olmsted, and Manning vision and plan; and extends the Village's small-town scale, architectural character, and walkability outward rather than allowing auto oriented commercial development to creep inward over time.

The preferred build-out scenario focuses redevelopment in a "core" area generally located in the quadrant around the Pinehurst Brewery east of Magnolia Road, south of McCaskill Road, and north Community Road. This is the area where the previous New Core plans were centered. This core area, as shown on the

Detail Plan on page 58, shows a variety of land uses to activate the area. The Detail Plan shows how a cross roads could be developed just east of the Brewery where a hotel, restaurant, and live-work units could develop. The area includes a central green and through street connections to McCaskill and Community Roads via Power Plant and Spur Roads as well as an extension to Mcintyre Road. There is no direct through connection of Rattlesnake Trail through the core area as recommended in previous plans. The plan proposes to better connect the core area to the Village Center via the extension of Power Plant Road and a walkway connection between the properties at 45 and 55 Community Road.

The "core" area currently contains the Public Services campus (approximately 5.37 acres) and Moore County Utilities water tank site (approximately 2.2 acres) that have great potential as "catalyst" properties that if combined and Public Services relocated could assist in helping to implement plan vision.

The Plan recommends a majority of new development as being office (140,000 square feet) and retail (51,000 square feet) and 66 hotel rooms. Very little new residential is being proposed with approximately 50 total residential units being added. See development program table on page 70 of the plan.

During the course of the planning period, there have not been many major changes to the development scenarios based on Village Council and public feedback nor significant diversions from the Comprehensive Plan recommendation. However, one area along the west side of Magnolia Road has been adjusted from the Public Workshop # 2 presentation. PW # 2 detail plan showed all detached single family units and a nonresidential structure at the southwest corner of Magnolia and McCaskill Roads (see Novus exhibit titled "VP Detail Plans from PW 2 and Preferred". During the course of plan discussions with Council, staff had recommended changing the residential uses along both sides of Magnolia to non residential (stand alone commercial or mixed use) given that the predominate land use on the east side of Magnolia is non-residential and a general planning goal is align land uses along both sides of a street.

During a work session with Planning and Zoning Board on March 18, the membership got into an in depth discussion of the preferred build out scenario with being concerned about the proposed non-residential land uses and the extension of the plan area. After discussions some members favored removal of the 3 lots to the south to be retained as residential with others supporting non-residential. While staff understands some of the concerns raised about the proposed non-residential land uses as shown on the west side of Magnolia, staff believes that the proposed land use pattern creates a symmetry of land uses along both sides of the block. Staff also feels that the PDO's current buffer requirements between residential and nonresidential uses are effective to not be detrimental to the adjacent residential land uses. Staff has also not received any contact from those adjacent residential land uses regarding concerns about the proposed plan.

Pinehurst South

Located almost directly south of the Village Center along NC 5, Pinehurst South encompasses approximately 290 acres with almost 47% of the area in a natural or undeveloped state. A portion of this area is unincorporated and is in the Village's Extraterritorial Zoning Jurisdiction (ETJ). The planning area also includes and abuts the historically African American neighborhood of Jackson Hamlet. The Village of Pinehurst Harness Track abuts the area on the northeast, the Lake Pinehurst neighborhood on the west, and CCNC on the east. The area contains a mix of uses ranging from single family homes, to attached housing, multiple family, older auto oriented commercial uses, newer office uses, retirement homes and an office

park (Trotter Hills). The 41 lot Pinehurst South Cottages subdivision was recently approved and is currently under administrative review.

The current zoning ranges from Neighborhood Commercial (NC), Office and Professional (OP), Multiple Family (RMF) and high density single family (R-5). Much of current undeveloped lands are in NC, OP, and RMF zoning.

The 2019 Comprehensive Plan recommends redevelopment with office, medical, life-science, and research facilities supported with small-scale retail services and residential uses. The Comprehensive Plan also proposed the idea of an "Innovation Hub" on the west side of NC 5 below Blake Boulevard. An innovation hub serves as a district or campus where businesses and people are located to work in a collaborative environment to conduct research and grow related businesses. Anchor institutions, renovated spaces, various industries, startups, business accelerators, business incubators, and support services are key aspects of an innovation hub. Innovation hubs commonly seen with medical, life-sciences, and educational institutions and generally require a large anchor such as an educational or medical institution to flourish.

The Plan builds upon the strengths of the existing conditions; the planning principles of the Tufts, Olmsted, and Manning vision and plan; and extends the Village's small-town scale, architectural character, and walkability outward rather than allowing auto oriented commercial development to creep inward over time.

Differing from the Village Place Plan, the Pinehurst South Plan does not have one "preferred build-out scenario" in favoring of showing a low and high intensity scenario with the high density scenario including more office square footage and attached single family homes (townhouses) versus single family detached. The plans also include a mix of open space types including an approximate 6 acre central green on the east side of NC 5 as shown on pages 72-73 of the plan and shown in detail on page 62 of the plan.

As part of the planning process, a market analysis was conducted and specifically examined the innovation hub recommendation (see page 15-16 of the market analysis). What the analysis found was that while there is ample land to create an innovation hub, "most of the ingredients of successful Innovation Districts are not present in Pinehurst South." Instead the analysis recommended developing a "modified Innovation Hub" planned to attract and facilitate companies and technologies related to the golf industry or golf cluster. The analysis specifically stated that "the creation of a walkable area with a strong sense of place would be attractive to a variety of users, residents, and visitors. The Pinehurst South Plan attempts to do this by creating a mixed-use environment east of NC-5 and south of Blake Boulevard by including commercial, retail, a 6 acre park, and single family residential (detached or attached).

The single family residential and park are the most significant deviations from the 2019 Comprehensive Plan recommendations for the Innovation Hub. The Comprehensive Plan did recommend housing in the form of 186 stacked residential units. Mixed-use can still occur but residential units have been proposed at the southern portion of the Innovation Hub area. This was done in part to create a more compatible land use scenario adjacent to Jackson Hamlet and because the plan was already identifying approximately 250,000 - 300,000 square feet of commercial/retail in the intensity plans. The central green helps to tie the mixed use area together and attempts to connect to other green an open spaces in the planning area.

A proposed "core" area is identified as block A on the intensity plans shown on pages 72 and 73 of the plan and shown in detail on pages 57 and 58 of the plan. This area could contain a restaurant, coffee shop, and market/incubator to focus retail and pedestrian activity.

The plan also identified the potential realignment of Monticello Drive to the south to create additional space on the Harness Track should the Village consider relocating all or some of Public Services operations. While some or all of those operations could likely locate from the current configuration, the additional space would allow additional landscape buffers to be created. Realignment of Monticello Drive would require some property acquisition to the south of the current alignment. This could also create some additional parcels that could be disposed for private commercial development as shown on page 58 of the plan as "proposed commercial".

The plan also identifies various new streets and street extensions to better connect the neighborhood. A significant plan recommendation involves identifying the potential to create a shared use path for a "Rails with Trails" with the Aberdeen Carolina and Western Railroad (ACWR) right-of-way running along NC-5. This could be a significant improvement to pedestrian and bicycle system and create a regional ped/bike connection. The shared-use path is only a concept, no design has been done, and the ACWR has not approved of anything other than being open to the concept and would have to be allayed of several concerns and liabilities before allowing such a path to be located within their right-of-way.

Plan Recommendations

The following two sections discuss staff recommendations and potential plan amendment recommendation options for Planning and Zoning Board action. Based on previous work sessions with the Planning and Zoning Board, staff is presenting additional options for the Board to consider for amending the plans (or not). The Board may also consider other options that have not been presented.

Village Place Staff Recommendation

The Planning and Zoning Board is being asked to provide a recommendation on the Village Place Small Area Plan.

Should the Planning and Zoning Board want to eliminate from the plan or show residential land uses on the Detail Plan similar to that shown on the PW #2 Detail Plan staff recommends that be discussed and acted upon separately or part of the motion.

For the one lot in the plan encompassing the majority of the area identified as "F" on the Preferred Build Out Plan on Page 71 of the Village Place Plan, staff is requesting the Board to act upon one of 3 options as discussed below:

Option 1: Support the non residential land use pattern along Magnolia Road as shown in the Detail and Preferred Build Out Plans.

Option 2: Support residential single family (attached or detached) along the Magnolia Road frontage retaining the single family detached pattern to the west.

Option 3: Support residential single family detached only along the Magnolia Road frontage.

Option 4: Support non residential or single family attached or detached along the Magnolia Road frontage retaining the single family detached pattern to the west.

Pinehurst South Recommendation

The Planning and Zoning Board is being asked to provide a recommendation on the Pinehurst Small Area Plan. While staff understands some of the concerns raised about the proposed deviation from the Comprehensive Plan recommendation to include residential in the area east of NC 5 and south of Blake Boulevard, for the reasons previously discussed as well as the creation of an additional housing type in the area provides for a better and more realistic mixed-used neighborhood to develop, especially if the 6 acre park can be created (note, the plan cannot require the park to develop).

As there has been concern raised regarding the deviation from the Comprehensive Plan, staff is requesting the Planning and Zoning Board consider following options:

Option 1: Support the deviation from the Comprehensive Plan and addition of the residential uses south of Blake Boulevard as identified on pages 72 and 73 of the Plan.

Option 2: Recommend changing the proposed residential land use pattern south of Blake Boulevard as identified on pages 72 and 73 of the Plan to non-residential land use pattern.



VILLAGE OF PINEHURST SMALL AREA PLANS

Public Workshop #2 Presentation

JUNE 2, 2021 | FINAL

Design Collective

DUGGAL REAL ESTATE ADVISORS

RKA RAMEY KEMP ASSOCIATES

VILLAGE OF PINEHURST

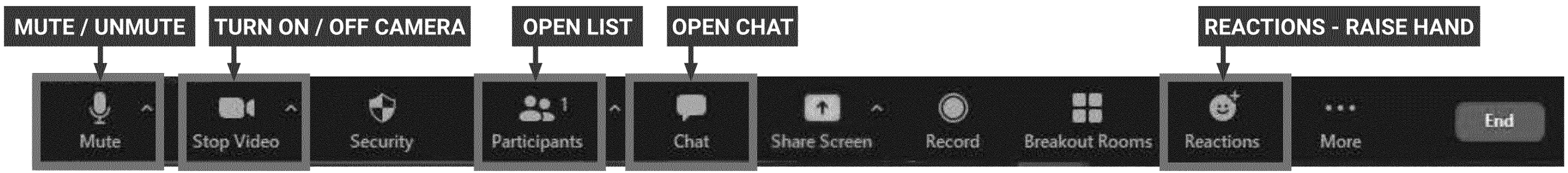


AGENDA

Workshop Start/Admission	5:30-5:35 PM
Presentation: Overview (20 minutes)	5:35-5:55 PM
Presentation: Village Place (20 minutes)	5:55-6:15 PM
Breakout Rooms: Village Place (40 minutes)	6:15-6:55 PM
Presentation: Pinehurst South (20 minutes)	6:55-7:15 PM
Breakout Rooms: Pinehurst South (40 minutes)	7:15-7:55 PM
Conclusion/Next Steps	7:55-8:00 PM

HOW TO PARTICIPATE - ZOOM

- This meeting is being recorded.
- If you have an urgent question during the Presentation, please use the Chat feature, accessed from the bottom toolbar, to send your question to the host and co-host(s).
- The 2 Breakout Room sessions will be the time to ask questions, give input, and listen to other stakeholders. One facilitator from our team will be in each room.
- If you logged into Zoom on two devices (e.g., laptop and mobile phone), click Participants, locate your name/number in the list, and click More to link your devices. Or, send us a Chat message with your two name(s)/number(s).



PROJECT TEAM



TEAM ORGANIZATION

VILLAGE OF PINEHURST

MANAGEMENT / DESIGN TEAM

Design Collective, Inc.

Principal-in-Charge
Matt D'Amico, PLA, ASLA

Project Manager
Cecily Bedwell, AICP, LEED AP BD+C

Planner/Urban Designer
MacKenzie Twardus, PLA

Landscape Architect
Brian Reetz, PLA, ASLA

CONSULTANT TEAM

Duggal Real Estate Advisors, LLC

Market Consultant
Melina Duggal, AICP

Ramey Kemp Associates, Inc.

Transportation Consultant
Adam Fischer, PE
Jessica McClure, PE

PROJECT OVERVIEW

Locator Map

- Village of Pinehurst boundary encompasses approximately 17.3 square miles
- Village Center is the historic hub of the community
- Two Small Area Plan (SAP) boundaries
  - » Village Place
  - » Pinehurst South

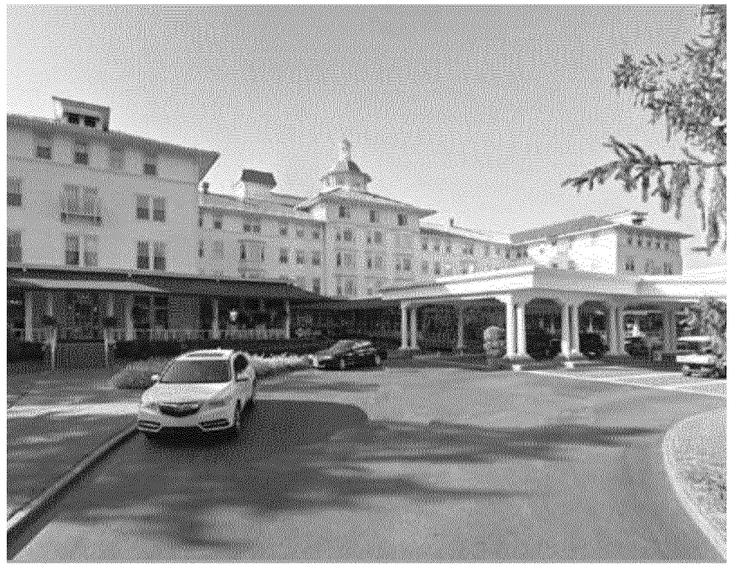


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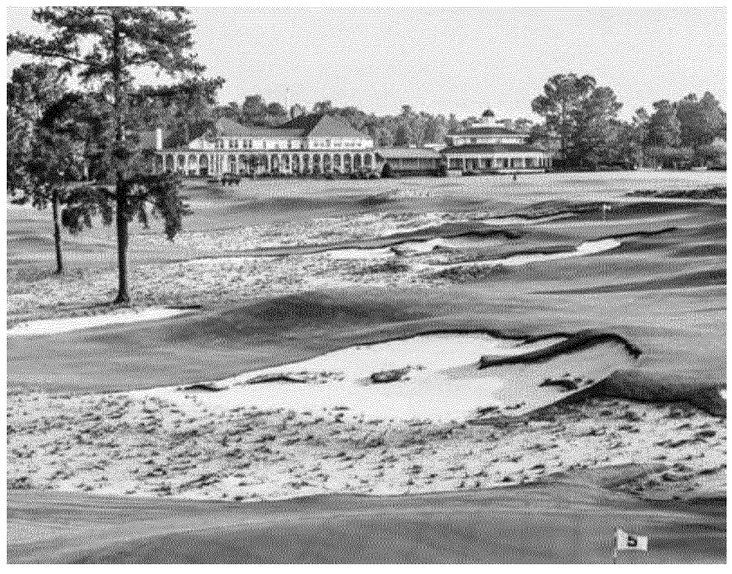
VILLAGE OF PINEHURST

SMALL AREA PLAN BOUNDARIES

PROJECT GOALS + OBJECTIVES









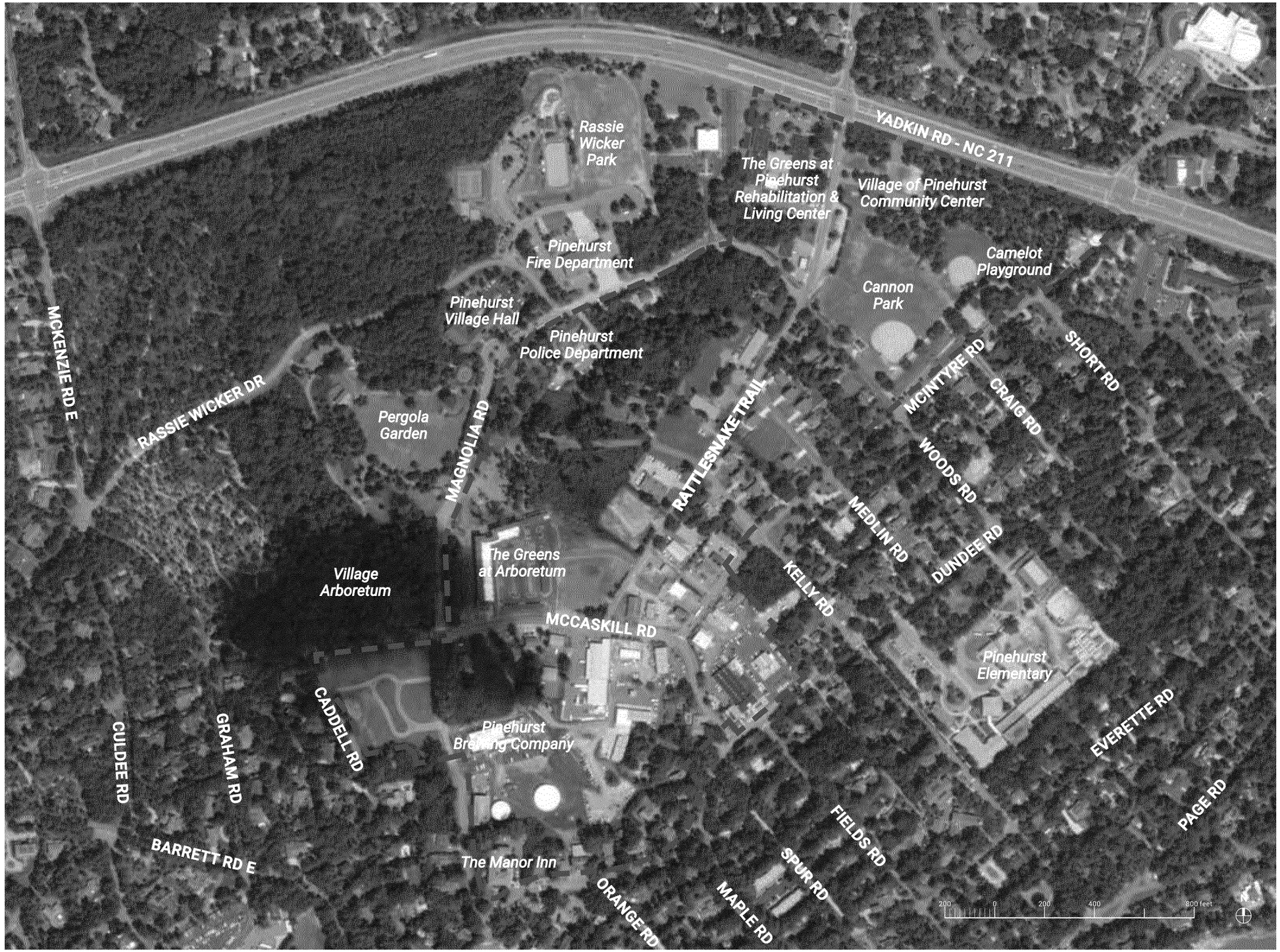
- Create two Small Area Plans and Form-Based Codes (FBC)
- Reference the newly adopted 2019 Comprehensive Plan
- Provide recommendations and an implementation strategy
- Focus on planning, landscape, transportation, streetscape, and market & economic improvements
- Build support through a robust engagement process

Site Aerial

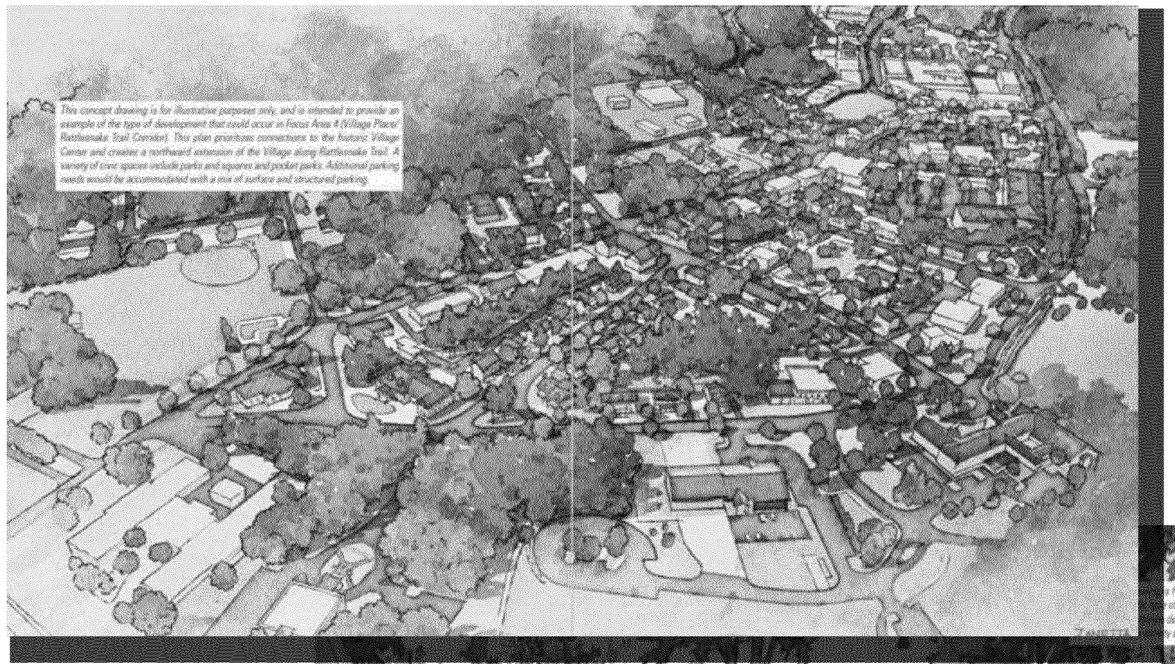
- Village Place Small Area Plan (SAP)
- Approx. 100 Acres
- Bounded primarily by Yadkin Road - NC 211, Magnolia Road, and McIntyre Road
- Characterized by single-family detached residential and a mix of non-residential and undeveloped properties

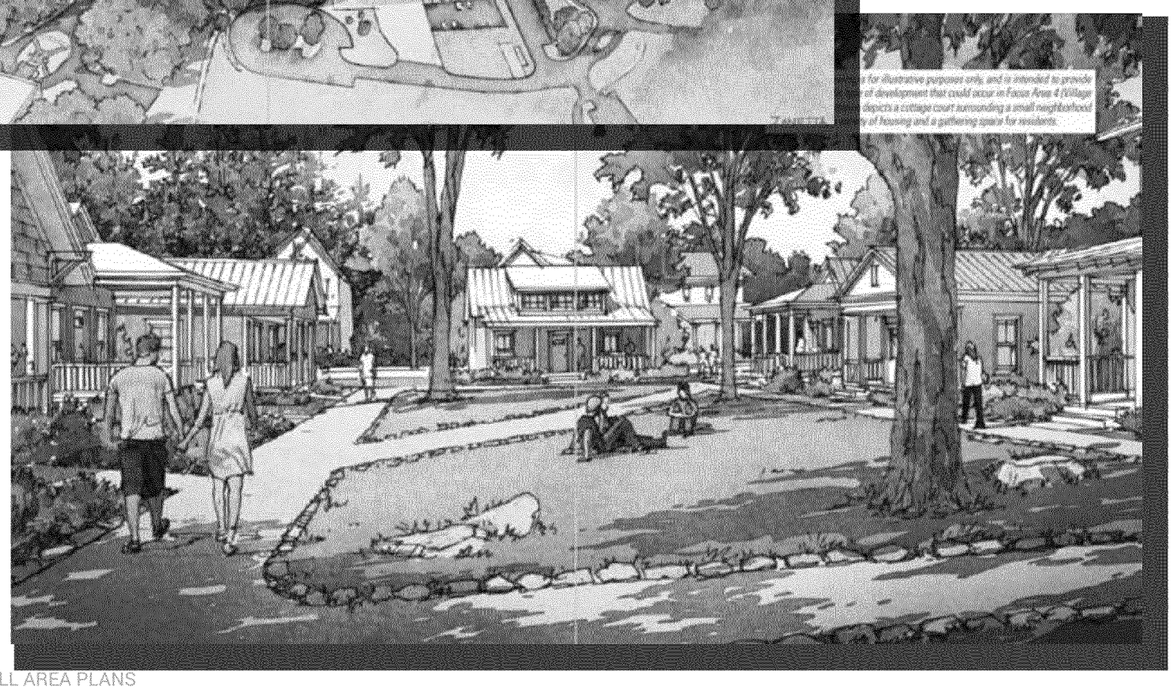
KEY

- SMALL AREA PLAN (SAP) BOUNDARY
- VILLAGE OF PINEHURST



2019 COMPREHENSIVE PLAN - VILLAGE PLACE





- Redevelopment to focus on a mixed use, walkable destination that is an extension of the historic core
- Existing industrial, retail, and multi-family uses to be redeveloped into destinations that reinforce the Village character
- New buildings: 1-3 Stories
- Parking to be addressed by a new parking deck, parking lots, and on-street parking
- Golf by Day/Arts by Night

PINEHURST SOUTH

Site Aerial

- Pinehurst South Small Area Plan (SAP)
- Approx. 290 Ac.
- Flanks Beulah Hill Road - NC 5 south of the Pinehurst Harness Track and north of Pinehurst Plaza
- Characterized by commercial uses along Beulah Hill Road - NC 5 and residential and undeveloped parcels to either side

KEY

- SMALL AREA PLAN (SAP) BOUNDARY
- VILLAGE OF PINEHURST



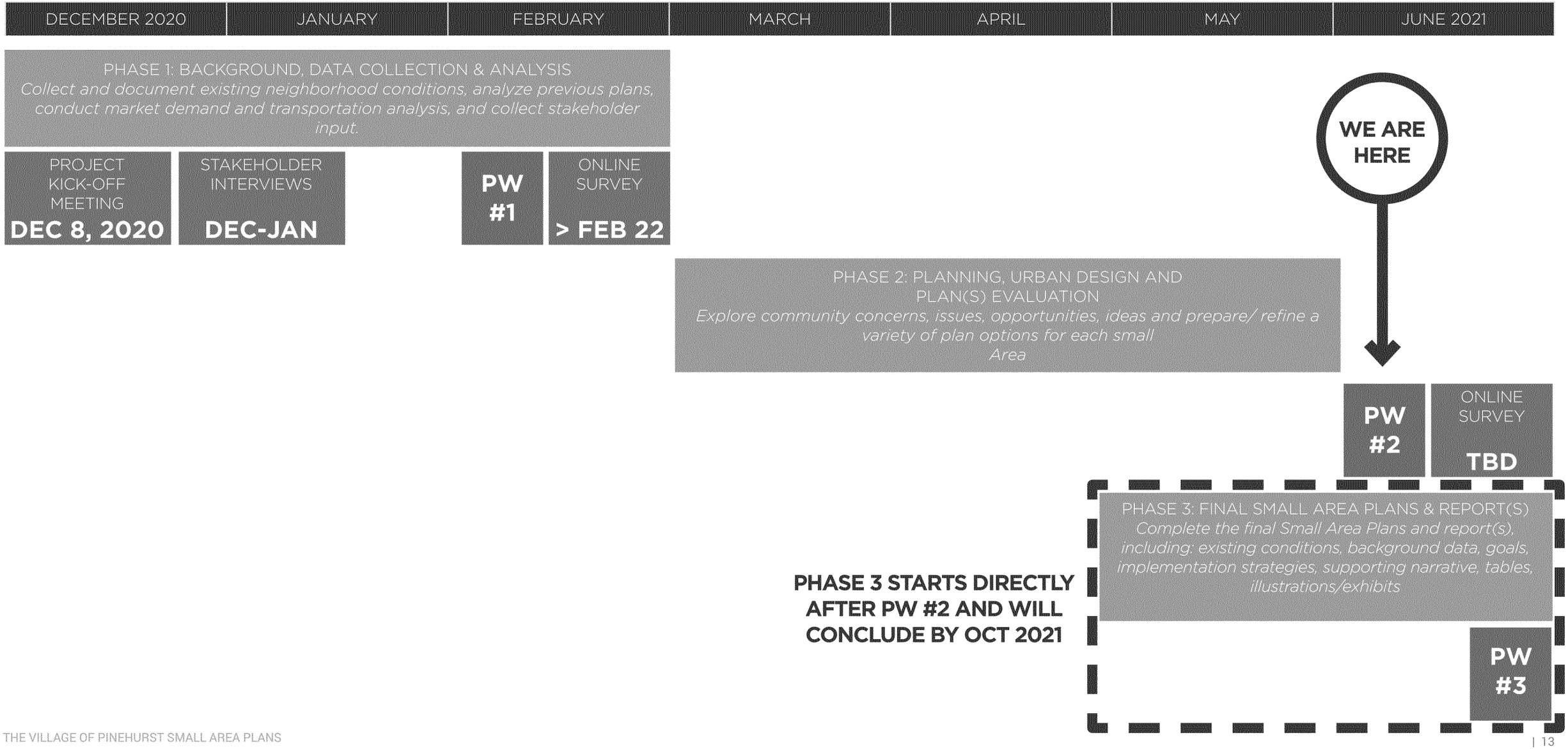
2019 COMPREHENSIVE PLAN - PINEHURST SOUTH



This concept drawing is for illustrative purposes only, and is intended to provide an example of the type of "Innovation Hub" type development that could occur in Focus Area 2. This illustration depicts a mix of uses in a compact, walkable development pattern. A variety of open spaces including parks, plazas and greenways are provided for the enjoyment of residents and employees. The large central park area is intended as a space for gathering and collaboration.

- Develop an Innovation HUB
- Target Greenfield, Infill and Re-development within one connected master plan
- Primary use targeted towards medical, life science, and research facilities
- Supporting uses may include retail, service and low rise mixed use
- New Buildings: 1-2 Stories
- Connect residential neighborhoods via grid of walkable streets

PROJECT SCHEDULE + SCOPE



ENGAGE PINEHURST - PROJECT WEBSITE

HTTPS://ENGAGE.VOPNC.ORG/SMALLAREAPLANS

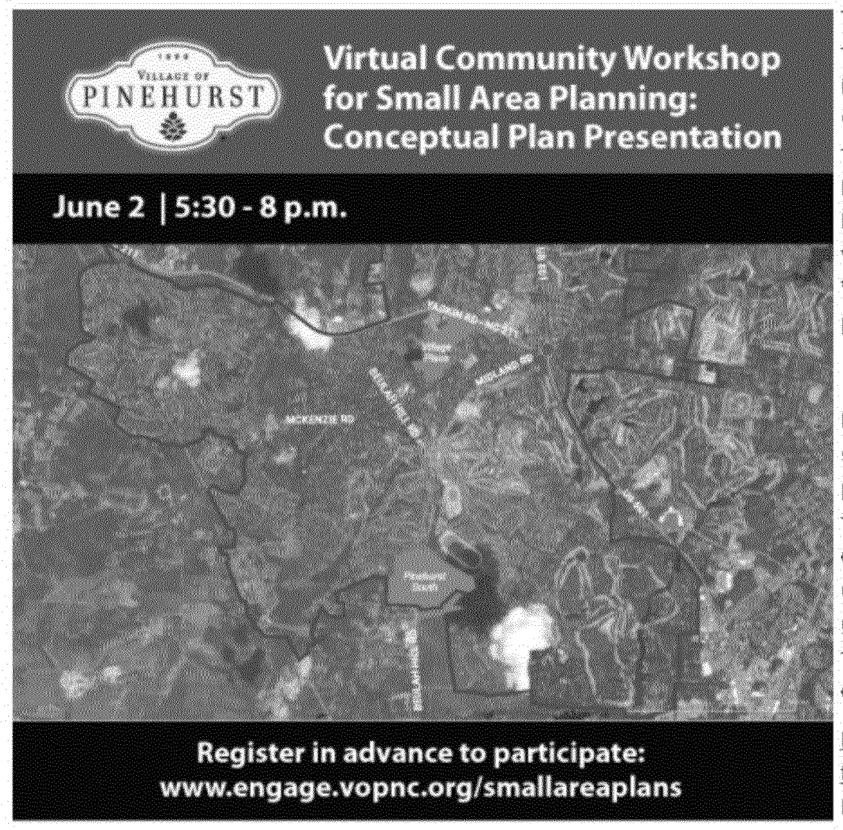
ENGAGE PINEHURST
YOUR VILLAGE · YOUR VISION · YOUR VOICE

Home | Get Started Here | Budget Breakdown FY 22 | West Pinehurst Community Park Site Master Plan | Small Area Plans | VOP Website | My VOP

Search | Sign in | Register

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Small Area Plans



The Village of Pinehurst invites the community to participate in the second virtual public workshop to gather feedback for the future two Small Area Plans; Village Place and Pinehurst South areas. The virtual workshop takes place Wednesday, June 2, at 5:30 p.m.

During this workshop, Village staff and consultants will present concept draft plans to the community for consideration. The conceptual drafts to be presented were guided by community ideas from previous public engagement.

Register here to participate in the second virtual workshop. Individuals will receive an

Important Links

- Register for the 2nd virtual workshop
- View the workshop presentation slides!

Key Dates

Second Public Workshop
June 02 2021

First Public Workshop
February 11 2021

Documents

- June Small Area Plans Workshop (611 KB) (pdf)
- Small Area Plans - Public Workshop #1 Summary (6.23 MB) (pdf)
- Small Area Plans - Public Workshop #1 Presentation (4.88 MB) (pdf)
- Small Area Plan Market Analysis Report Final.pdf (65.5 MB) (pdf)
- Existing Conditions Diagrams.pdf (2.92 MB) (pdf)

PHASE 1 COMMUNITY ENGAGEMENT

SUMMARY

Overview

Stakeholder input and feedback are critical to creating a community-supported vision for Village Place and Pinehurst South.

- In November 2020, the consultant team led by Design Collective, Inc. was engaged by the Village of Pinehurst.

- Throughout December 2020 and January 2021, the consultant team conducted over 20 key stakeholder interviews with Village staff, appointed and/or elected officials, agency representatives, committee chairs, residents, local businesses and merchants, golf and tourist industry representatives, major employers, property owners, developers, brokers, and others.

- In February 2021, the consultant team and Village of Pinehurst held Public Workshop 1 (of 3) to outline a vision for the future of the two Small Area Plans with public input and guidance. The Public Workshop was held virtually due to COVID-19. There were 148 registrants (including consultant and Village staff team members), and approximately 100 participants.

- During Public Workshop 1, Breakout Rooms were used to give participants the opportunity to ask questions, give input, and listen to other stakeholders.

- Additionally, the project website offered those who were not able to attend the workshop an opportunity to view the materials, take an Online survey, and give additional feedback.



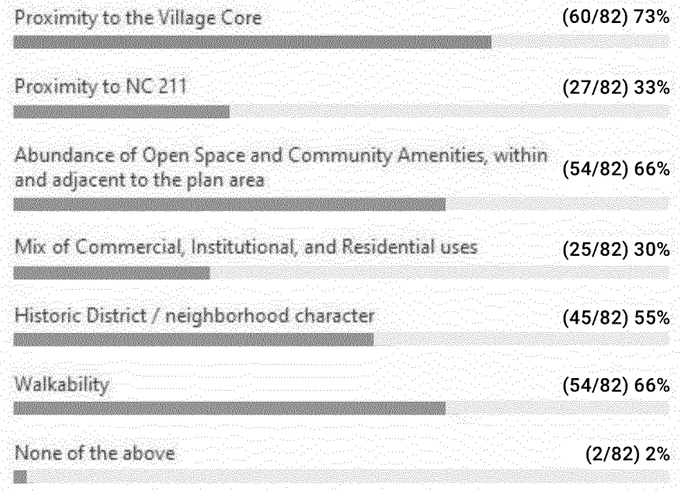
SCREENSHOTS FROM THE VIRTUAL PUBLIC WORKSHOP PRESENTATION

Village Place Polling Results

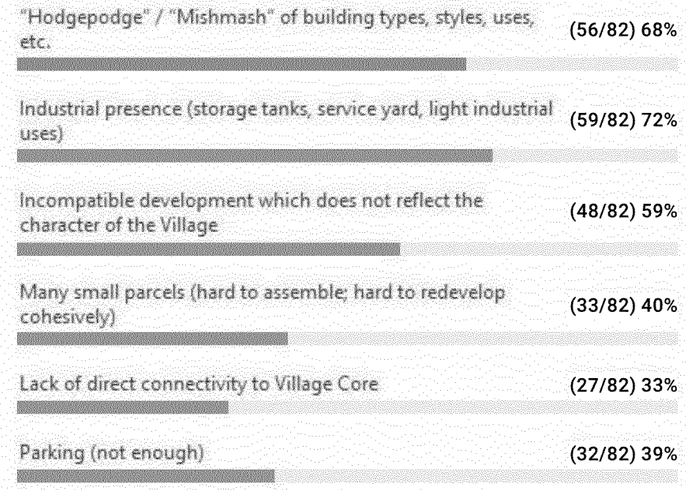
The Public Workshop included two rounds of Polling Questions, one for Village Place and one for Pinehurst South. The polls were available live during the Public Workshop and also on the Project website for 10 days following the event. Participants were encouraged to use the polling questions to express their views on the strengths, weaknesses, and opportunities relating to each Small Area Plan.

This page shows the cumulative results of the Polling Questions for Village Place.

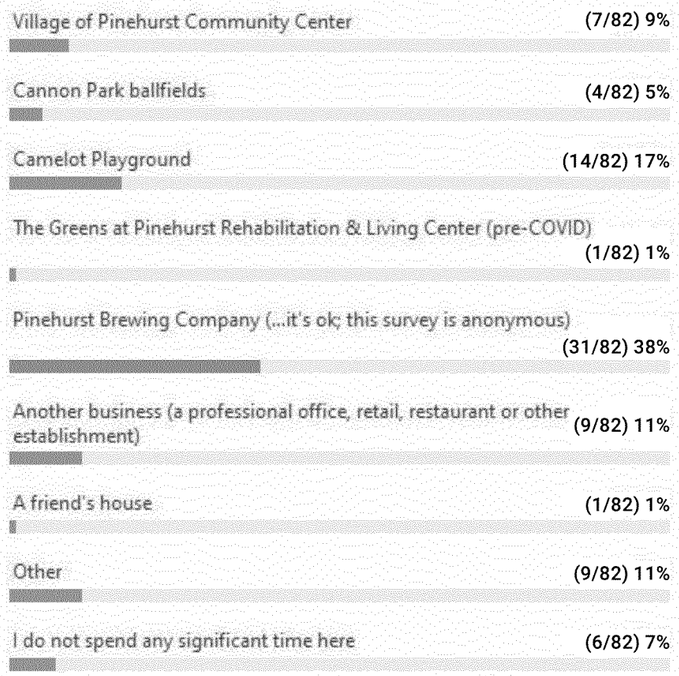
1. What are the strengths of Village Place, as it exists today? Check all that apply. (Multiple choice)



2. What are the weaknesses of Village Place, as it exists today? Check all that apply. (Multiple choice)



3. What is your favorite or most frequented place to visit within Village Place? Choose one.



4. What would you like to see (more) of in Village Place? Check all that apply. (Multiple choice)

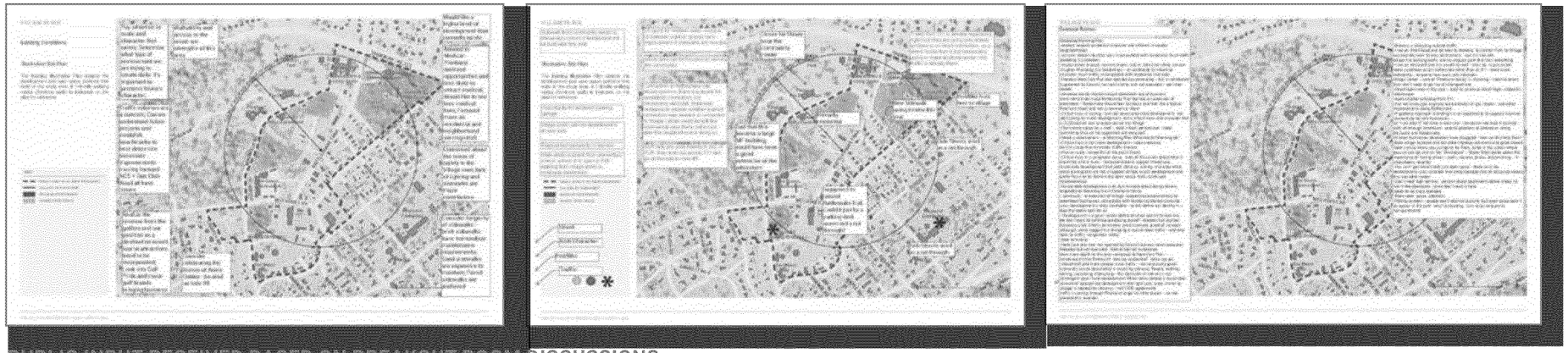


Village Place Input Summary

The Public Workshop offered the community an opportunity to voice their observations and concerns about the future of Village Place and Pinehurst South. The list below is a compilation of the comments received during Public Workshop 1, as well as additional comments received by staff post workshop. For a full list of comments recorded during Public Workshop 1, please reference the document's Appendix posted on the website.

Land Use

- Village Place lacks a sense of place and is currently a hodgepodge of uses
- Pinehurst is established as a destination resort for golfers, therefore the needs and desires of visitors should be taken into account as it is a major source of revenue for businesses. Consider amenities or retail options that support these users – i.e. golf related retail
- Desires:
  - A library to be located in this area, particularly across from Village Hall - 2-story building
  - Uses that serve the community; i.e. personal services, neighborhood serving retail, open space, library
  - Live/work or other creative solutions for residential. However, some stakeholders are concerned that apartments above retail currently do not work well in VC (most likely due to parking)
  - Multi-family or townhouses (mixed opinions from stakeholders)
  - There are mixed opinions about restaurants in this area. Some stakeholders feel they are needed, as there is nowhere to go right now, however there is concern for character, competition with the VC and more traffic
  - Village Place would be a good opportunity for retail space if not in competition with VC
  - The uses in this area should complement the VC, be an extension of it and serve the community, not compete with the VC
- Concerns:
  - Apartments may attract residents who are not invested in the community
  - Concern about industrial uses – safety for children, truck traffic
  - The Public Service area is an eyesore, this area would be better as mixed use for the public



PUBLIC INPUT RECEIVED BASED ON BREAKOUT ROOM DISCUSSIONS

The pages above are examples of notes taken in various Breakout Rooms during the Public Workshop. For a full reference of these comments, please see the Appendix.

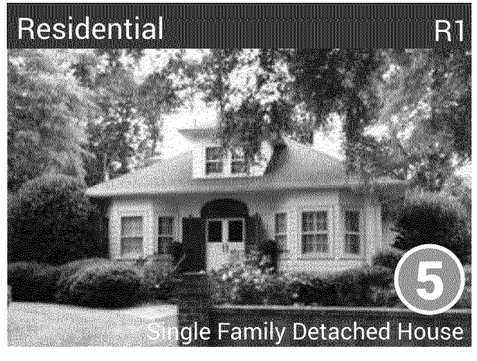
Character

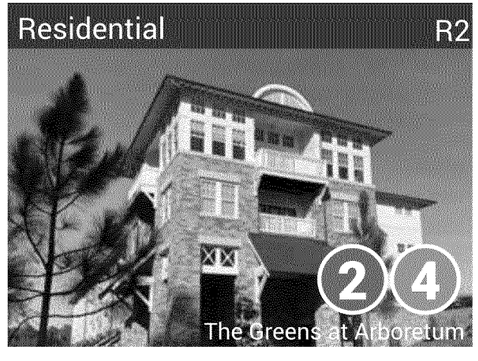
- Village Place lacks an overall plan
- Architecture:
  - Concern for existing uses that do not match the character of VOP, overall the entire area needs better architectural character.
  - Architectural character should blend in with the Village, more traditional
  - Desire for adaptive reuse, not for new construction or cheap construction
  - Maintain scale and character of older single family detached homes, preserve historic character
  - "New England Small Town"
- Landscaping & open space are very important to the character of Pinehurst
- Concern for protecting existing trees
- Some stakeholders believe this area should have no more rental units and no new construction over 2 stories

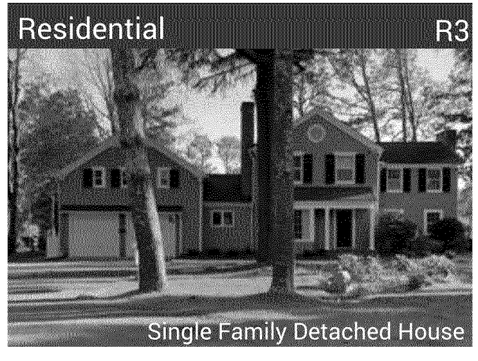
Transportation

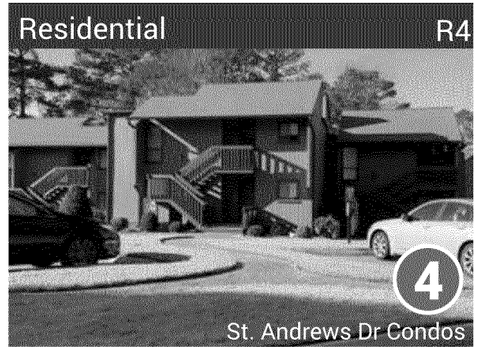
- Need for an independent, professional traffic study
- Overall need for improvement in pedestrian circulation in this area. Pedestrians currently walk but it is not safe. If it were safer, more people (families) would walk between destinations as opposed to drive
  - Connecting to the schools
  - Connecting various open spaces
  - Connecting to VC (residents already bike/ walk from here to VC)
  - Paths along Rattlesnake Trail , esp. west side
  - Consider a bike-share program
- Considerations for paths:
  - Consider longevity of sidewalks – brick sidewalks and sand sidewalks require a lot of maintenance - mixed opinions about desired sidewalk material
  - Maintain clay paths where it makes sense in the historic district
  - Consider visual interest along pathways – i.e. buildings that are visually interesting, buildings lining the street
  - Need crosswalks along Rattlesnake, not just at 211
  - Consider use by golf carts
  - Desire for a singular path that links everything together
  - Leverage public/private partnerships to improve sidewalks/trail connectivity
- Traffic is an overall concern in the area, roads are stressed, current infrastructure will not support increase in traffic
  - Pinehurst Brewery is attracting outside traffic. Some stakeholders find this traffic concerning
  - Cut through traffic on the side streets – i.e. Woods Rd, Fields Rd to get to the Village Core
- Rattlesnake Trail
  - There needs to be a better gateway from 211 – although some stakeholders think the opposite, do not want to entice visitors
  - This road should feel like a Pinehurst street, not a commercial street, i.e. improve landscape and streetscape to be consistent with streets in VC
  - Mixed opinions about a cut-through for Rattlesnake – a pedestrian connection would be beneficial, not sure about vehicular
  - Rattlesnake could be a better entrance, a big connector to the hospital as well
- Parking is a major concern:
  - If there is more development, will need even more parking.
  - Parking needs to be convenient and safe
  - Need parking south of McCaskill to support the Brewery, Manor Inn and Village Center parking needs
  - No parallel parking on residential streets, walking paths on every street
  - Opportunity in this area for an aesthetic parking garage
- Concern that widening roads which will displace existing trees
- Extension of Kelly Road could be a good idea if "cleaned up" and leading to a destination

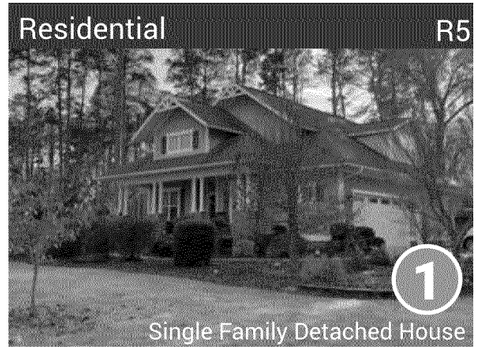
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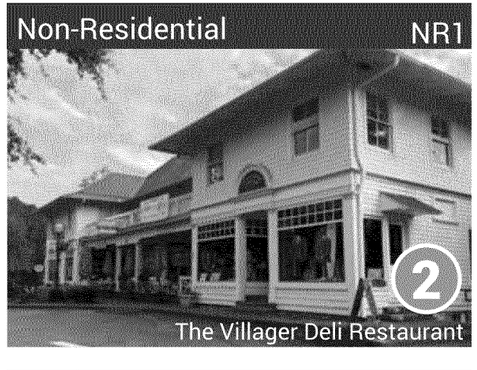


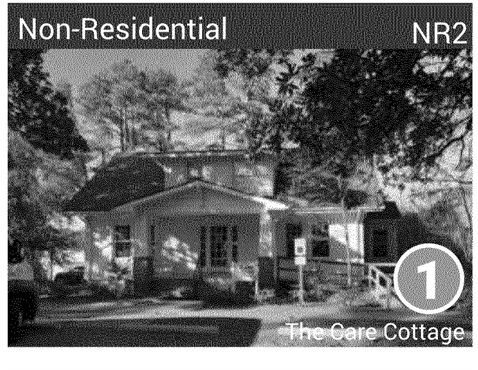






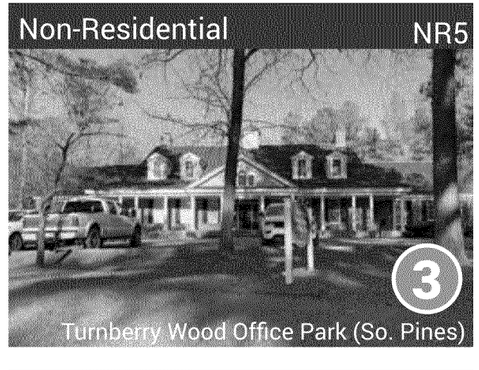






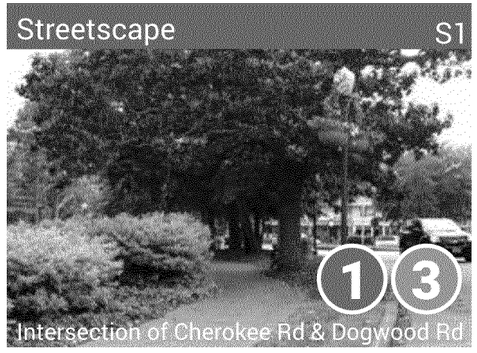


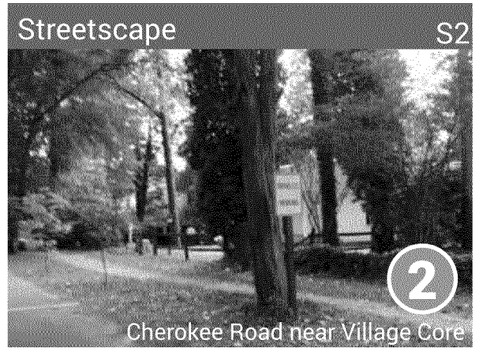


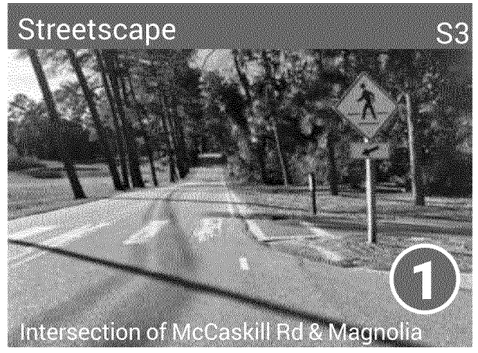


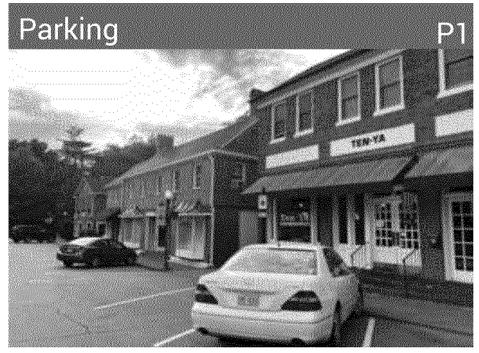
ARCHITECTURE

STREETSCAPE/ PARKING



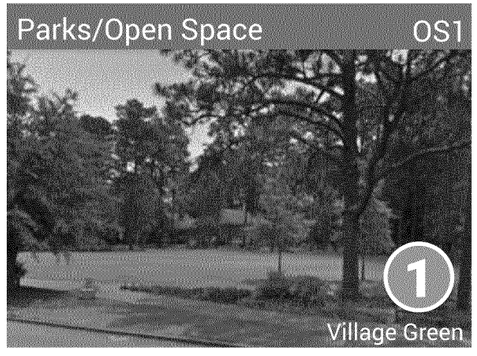




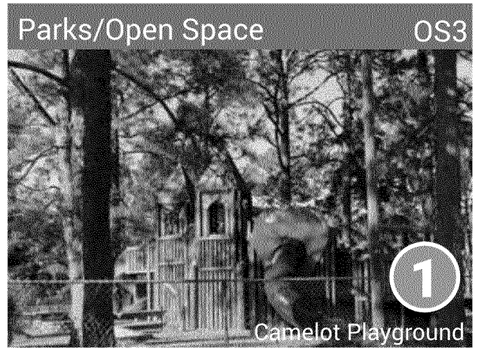




PARKS/ OPEN SPACE











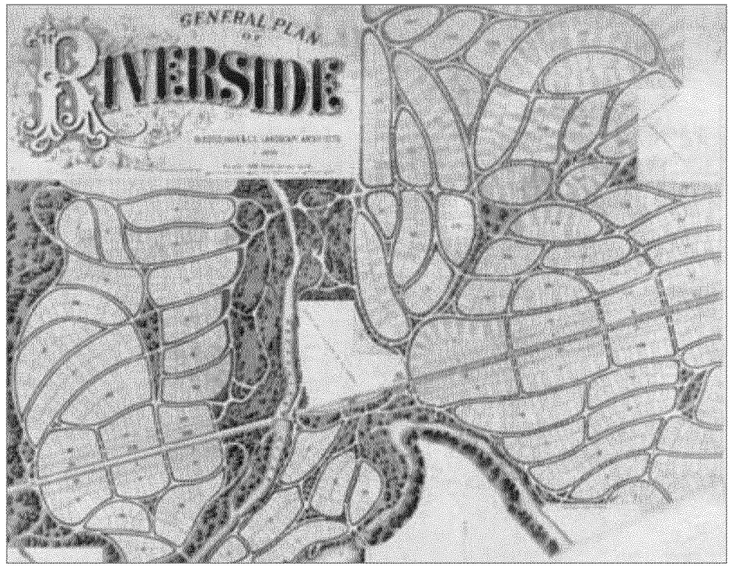
SMALL AREA PLAN PRECEDENTS

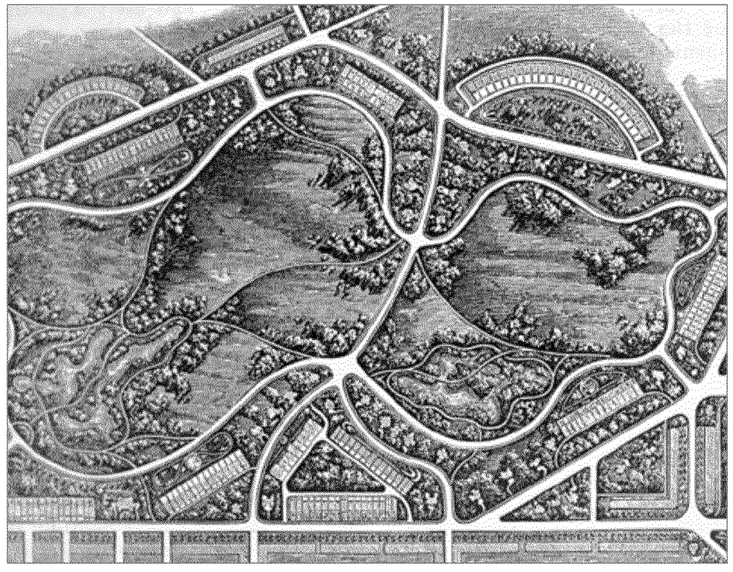
PUBLIC INPUT RECEIVED BASED ON BREAKOUT ROOM DISCUSSIONS

The feedback above is a summary of all Breakout Rooms. Participants were encouraged to respond to "like" (green) or "dislike" (red) for each photo.

GUIDING PRINCIPLES

Olmsted - Precedents

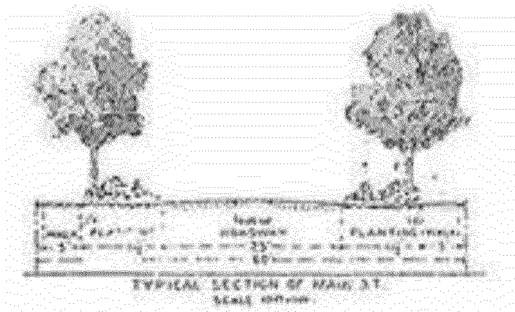


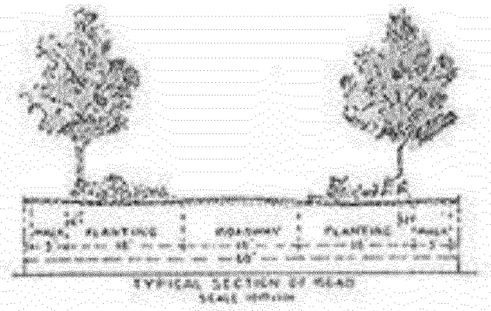


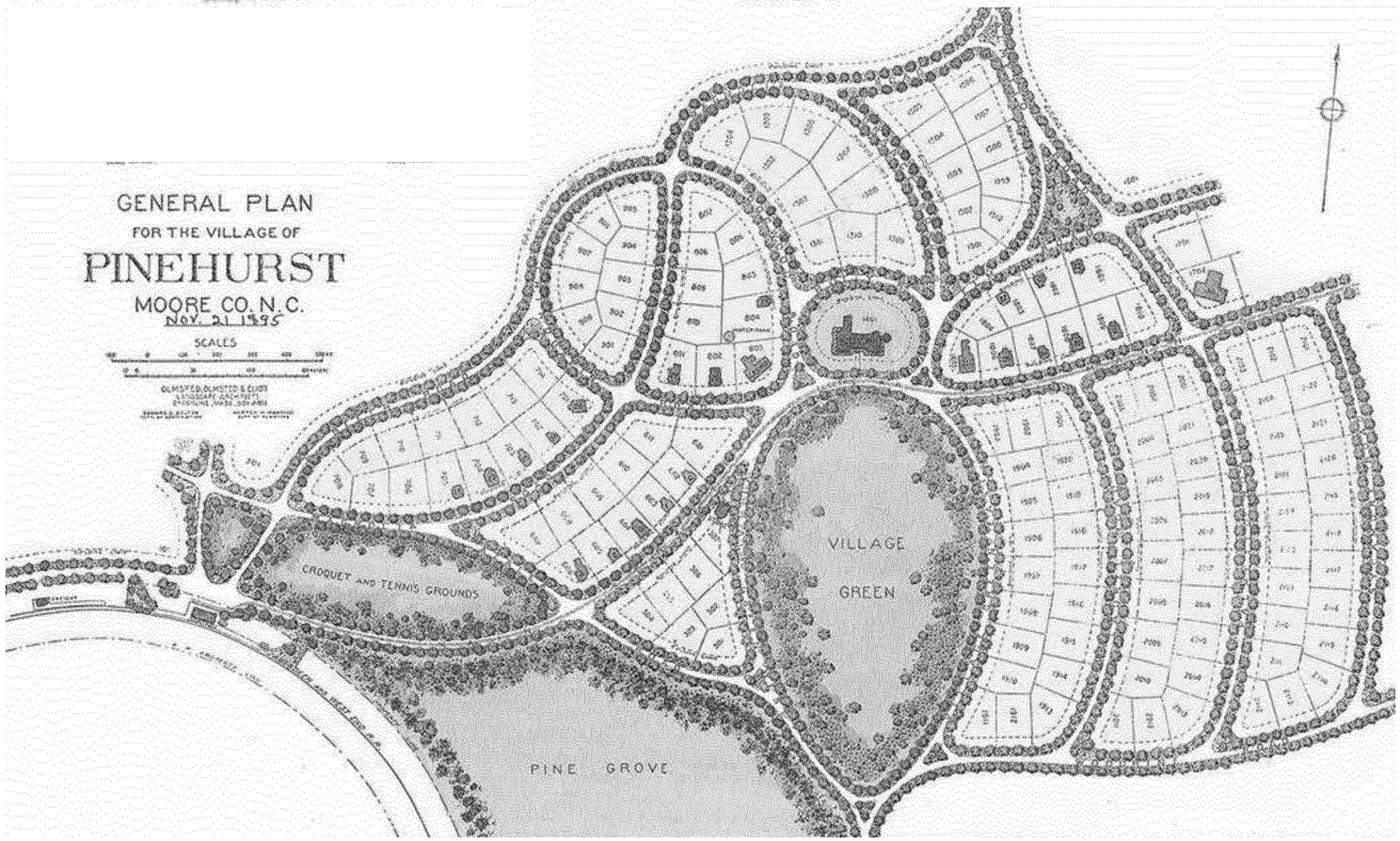




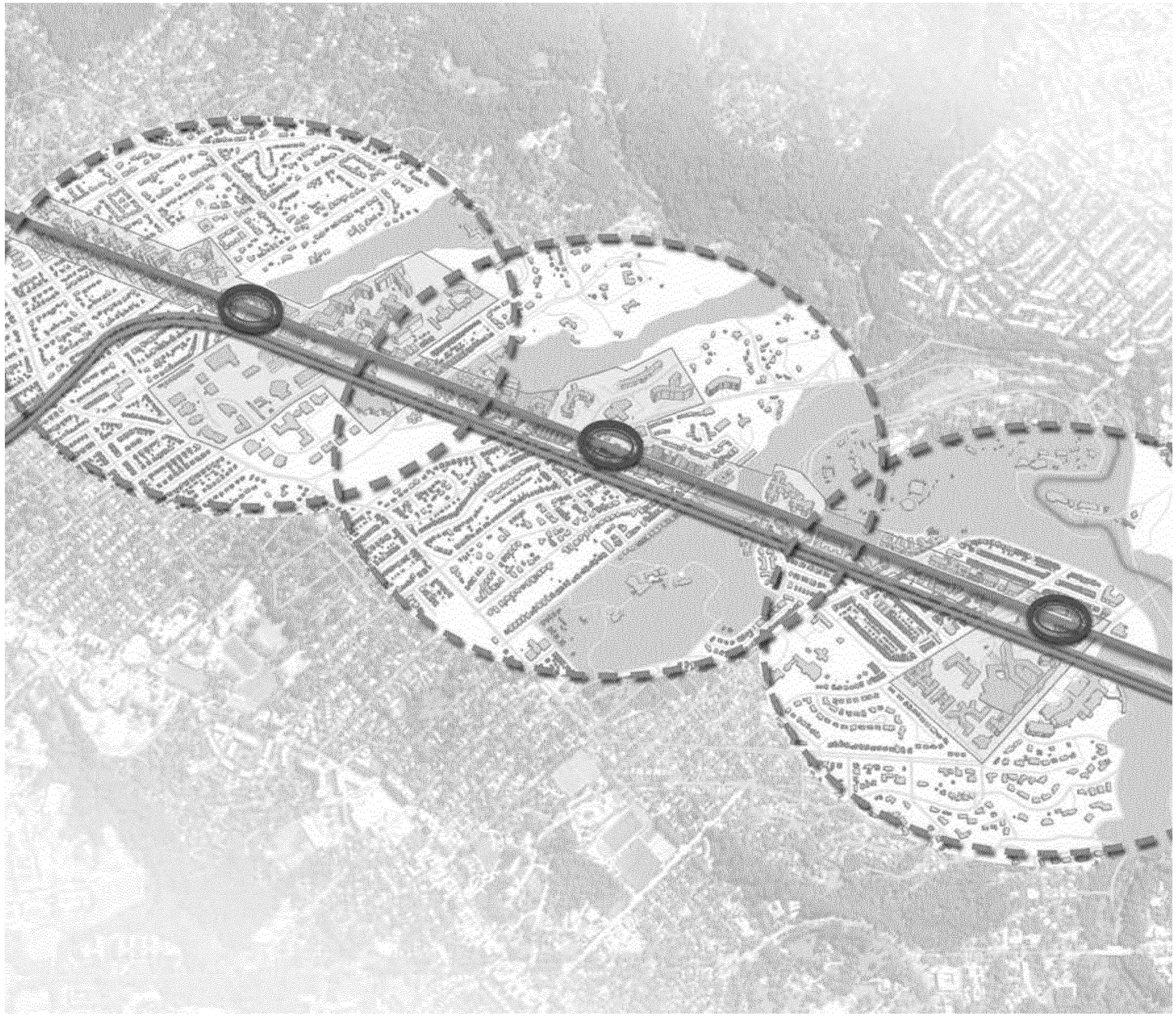
- Curvilinear street forms, following topography and continuously redirecting views
- Triangular medians at curvilinear street intersections
- Organic grid with short, walkable blocks
- No cul-de-sacs
- Consistent building setbacks (except for Civic uses)
- Tree-lined streets; typically with deciduous and regularly spaced trees
- Organic landscape design in Open Spaces





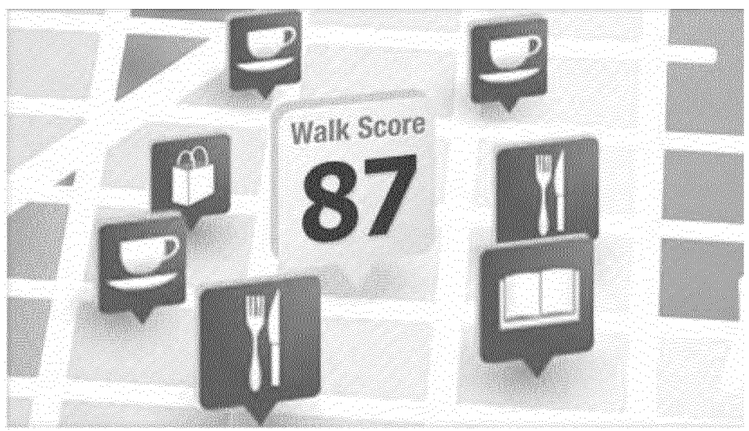


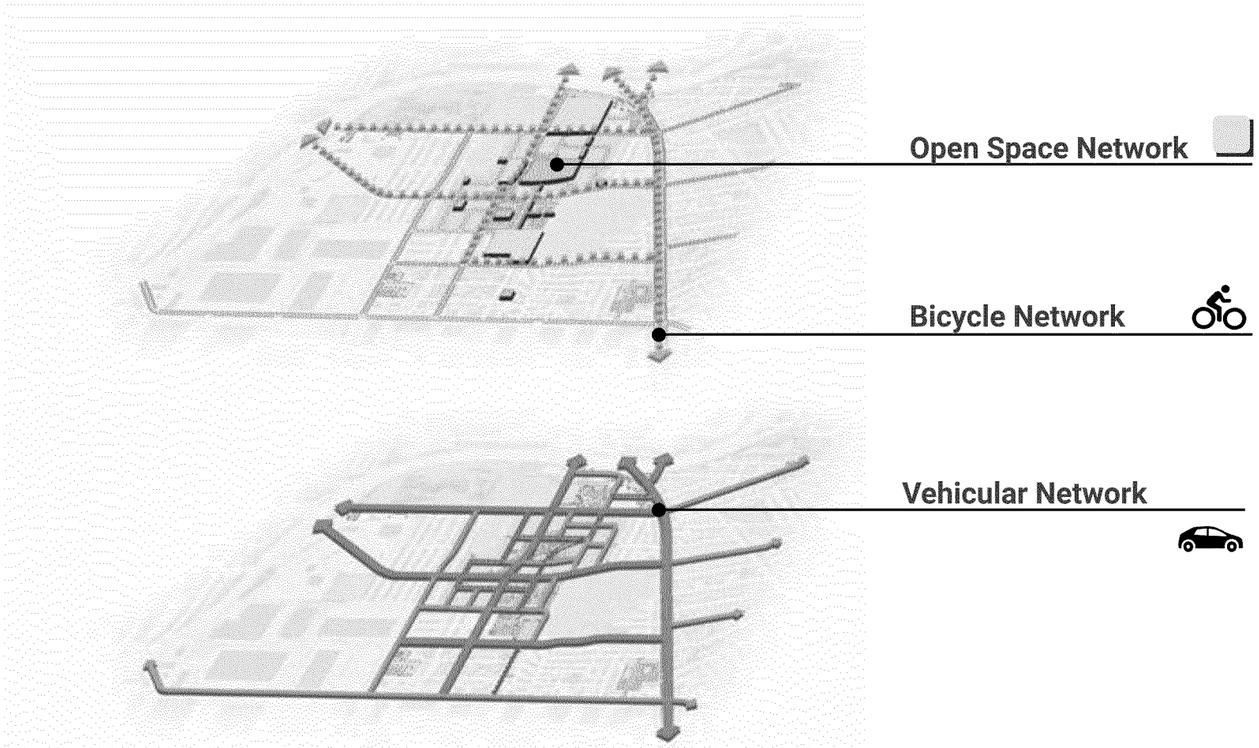
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- Triangular medians at curvilinear street intersections
- Organic grid with short, walkable blocks
- No cul-de-sacs
- Consistent building setbacks (except for Civic uses)
- Tree-lined streets; typically with evergreen trees and shrubs in irregular groupings
- Organic landscape design in Open Spaces

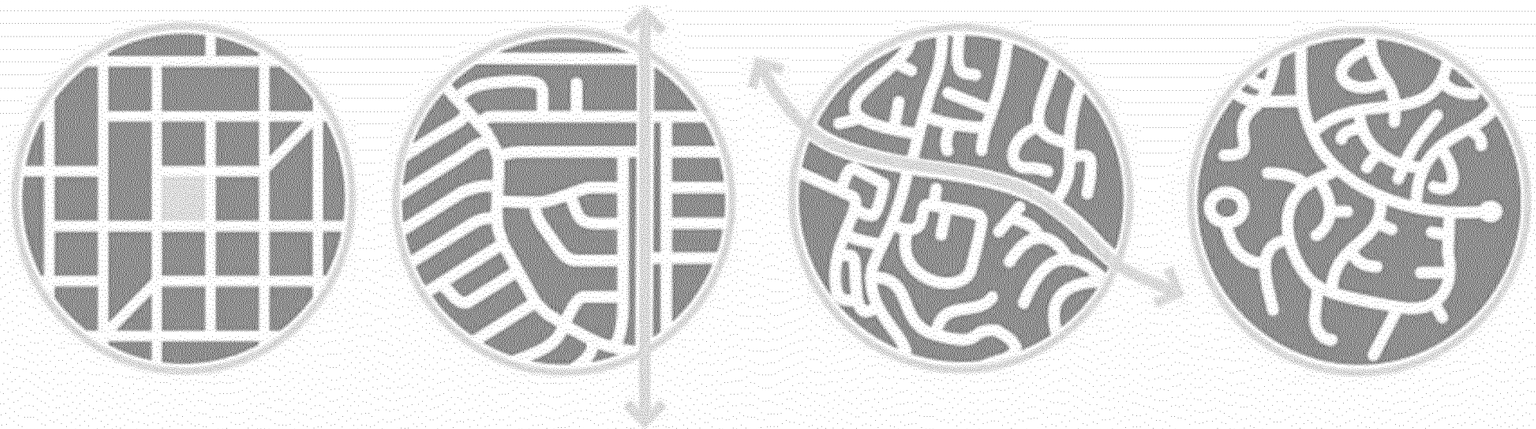


Establish Identifiable Centers/ Nodes

- » Create walkable environments
- » Relates to 5- and 10-minute Walk Radii. A person can typically walk a mile in 20 minutes; the average person will choose to walk (ilo driving), if the destination is </= to a 10-minute walk and is a pleasant experience
- » Each Center/Node should be distinct in character with a physical break and, ideally, has a mix of uses
- » Particularly important along commercial corridors, such as NC 5 in Pinehurst South



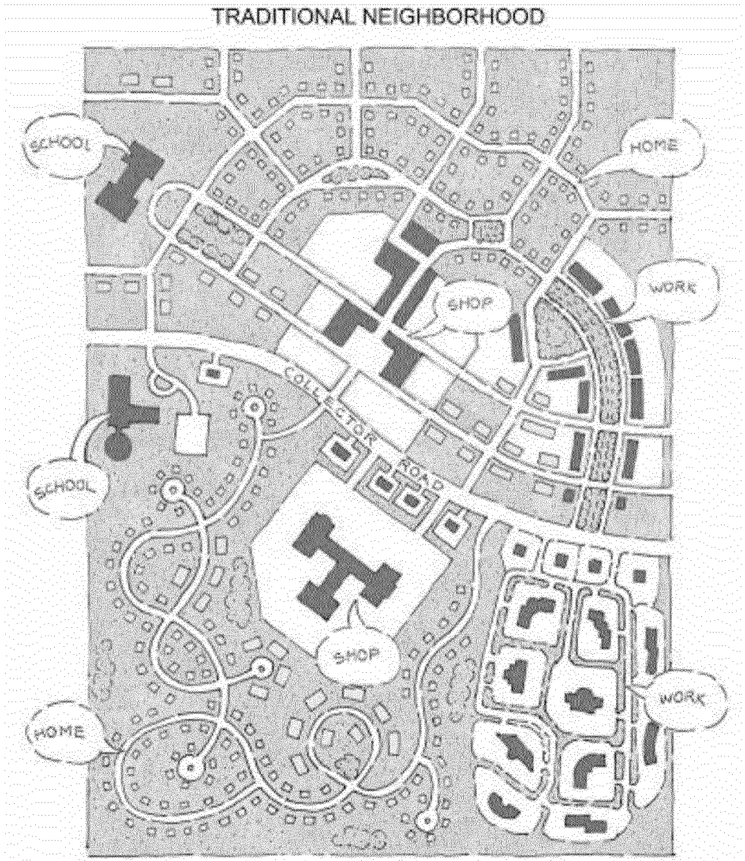




Source: cnu.org

Create a Connected Network

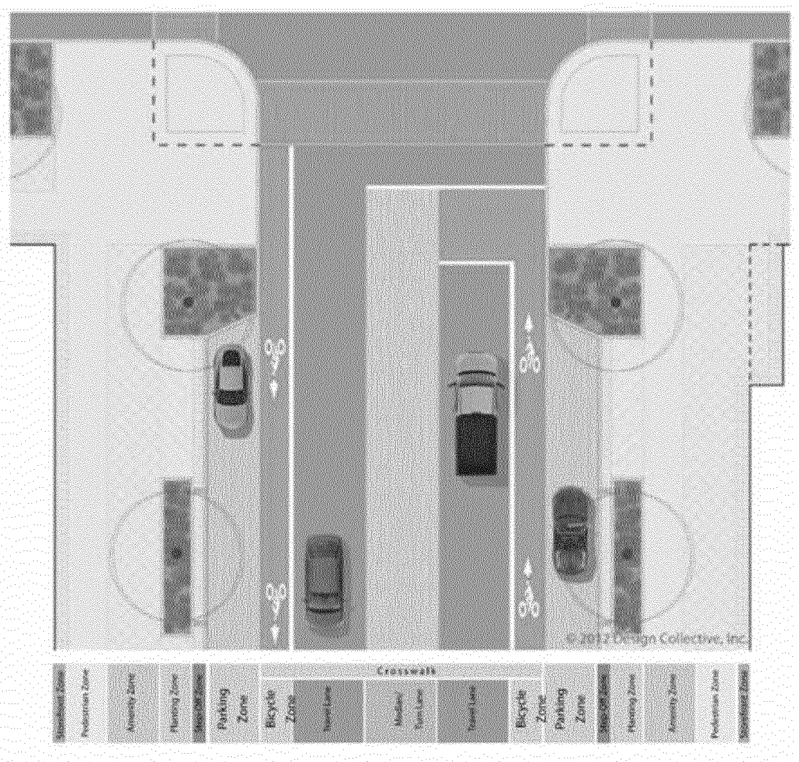
- Provides greater accessibility through more direct routes, compared to a branching system
- Increases overall network efficiency and reliability through added redundancy
- Improves multi-modal transportation and encourages walking and bicycling
- Improves safety and public health



SUBURBAN SPRAWL Source: McGill



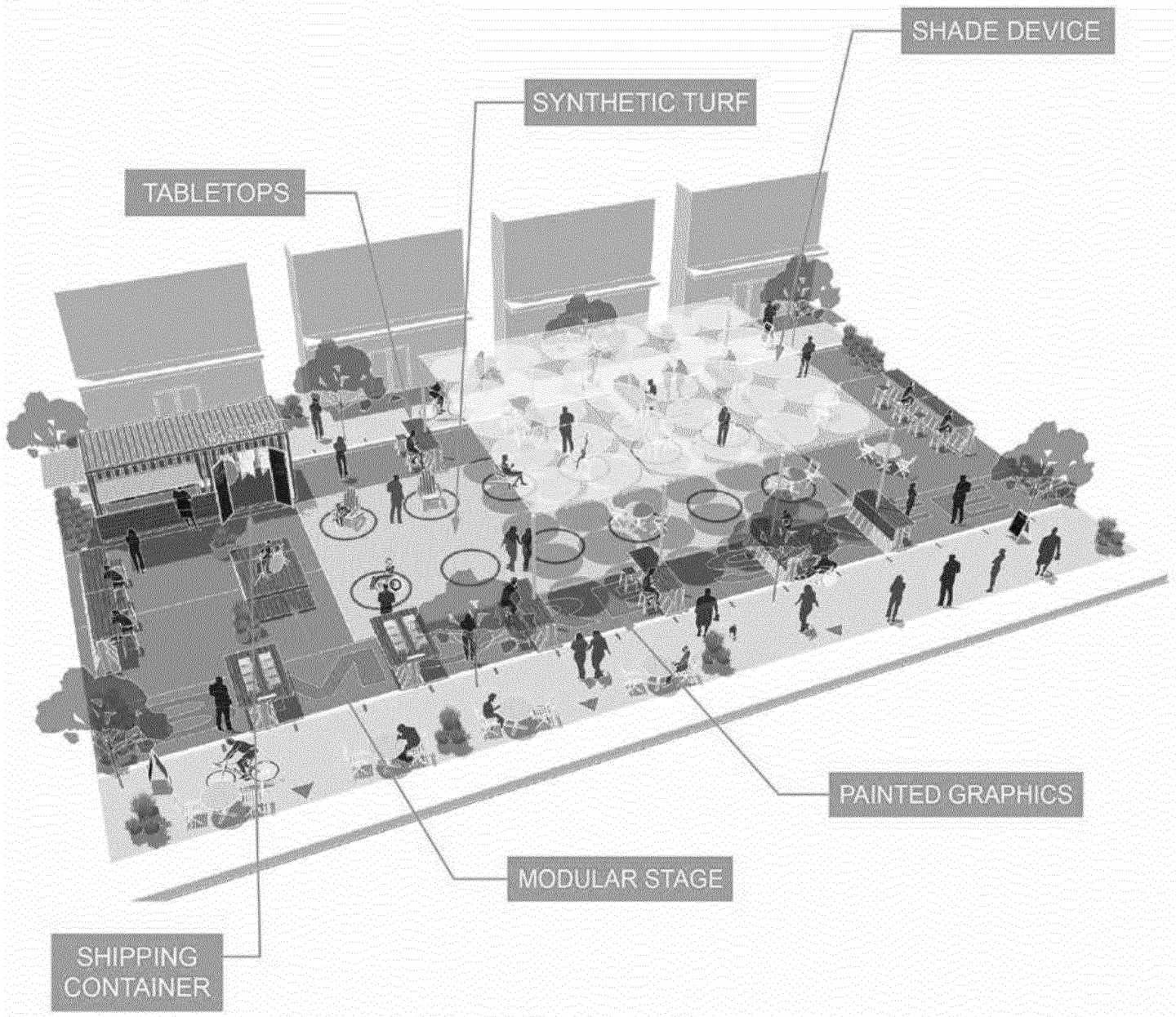


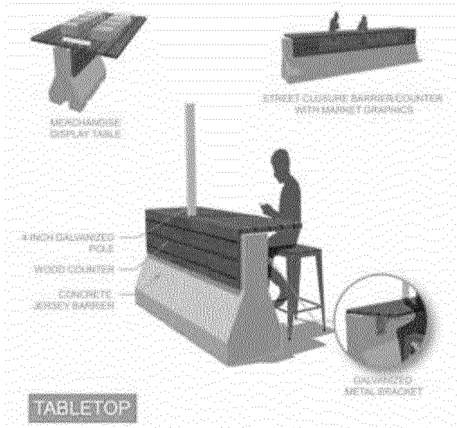


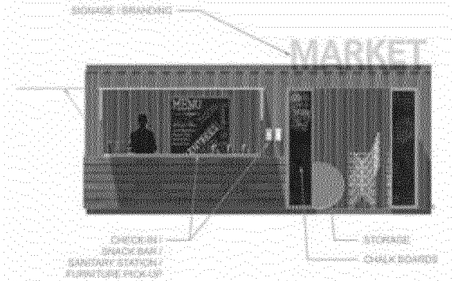


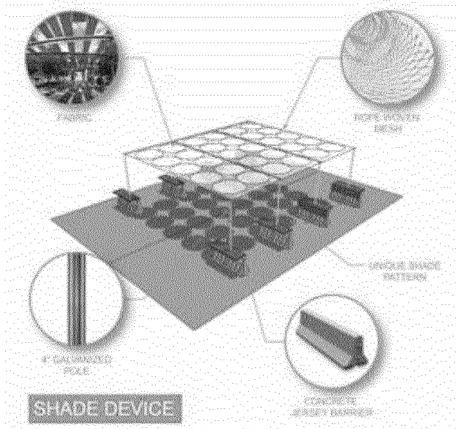
Establish Complete Streets

- Complete Streets are streets that provide safe and convenient accommodation to all potential users, including pedestrians, cyclists, transit riders, and motorists alike.
- Complete Streets recognize that crossing the street, walking to visit neighbors and businesses, and cycling to work are equally important to driving.
- Complete Streets recognize that streets are our most highly-used public open space.
- Complete Streets address the full streetscape, from building face to building face.
- Complete Streets address sustainability, providing tree canopy, integrating innovative stormwater management (SWM), and promoting wellness and walkability.



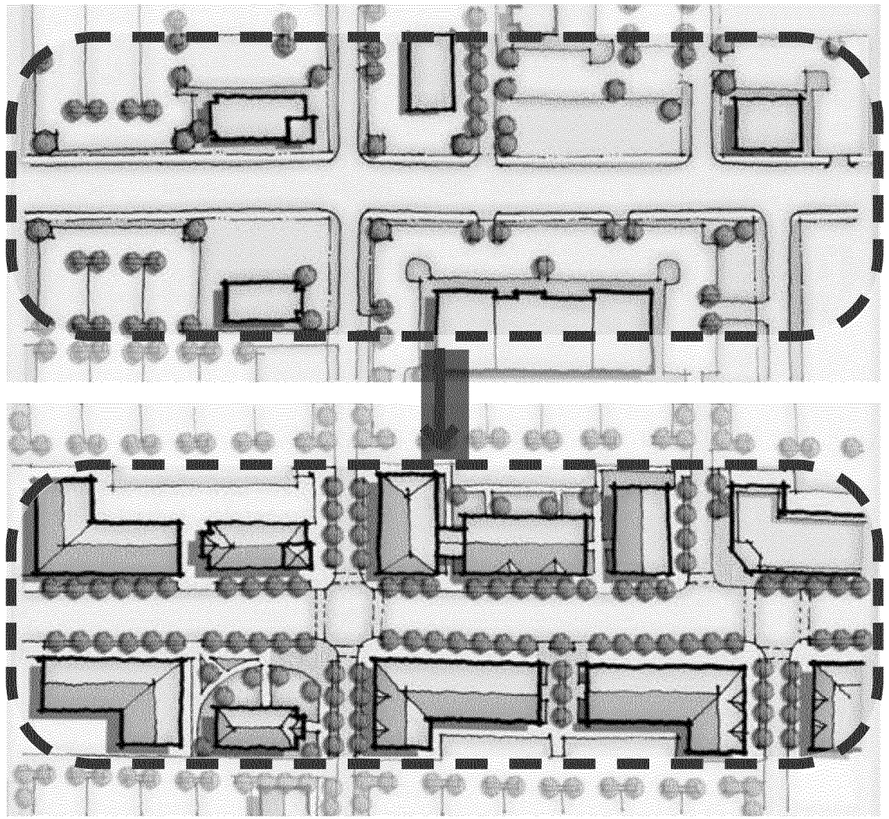






Design Streets for Flexible Programming

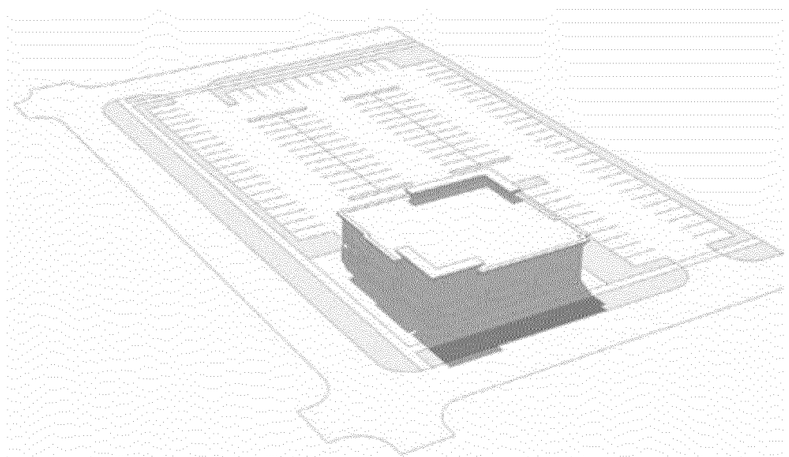
- Streets in core locations should be flexible and adaptable
- Able to carry pedestrians, bicycles, and vehicles on the typical day
- But on event days, or in unique circumstances like the pandemic, be able to close to vehicular traffic to host festivals, in-street dining, provide additional open space, etc.



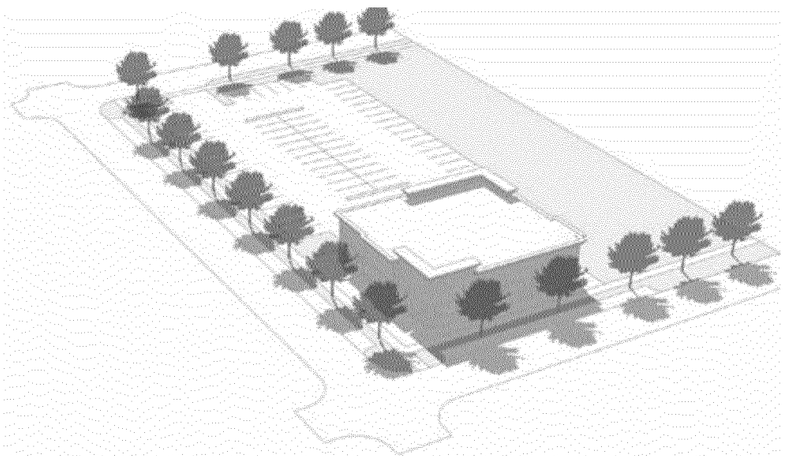
Strengthen Frontage

- » Define Frontage with Street Trees and Buildings
- » Encourage infill that respects or helps define the street wall
- » Relegate parking to side or rear
- » Explore parking ratio reductions

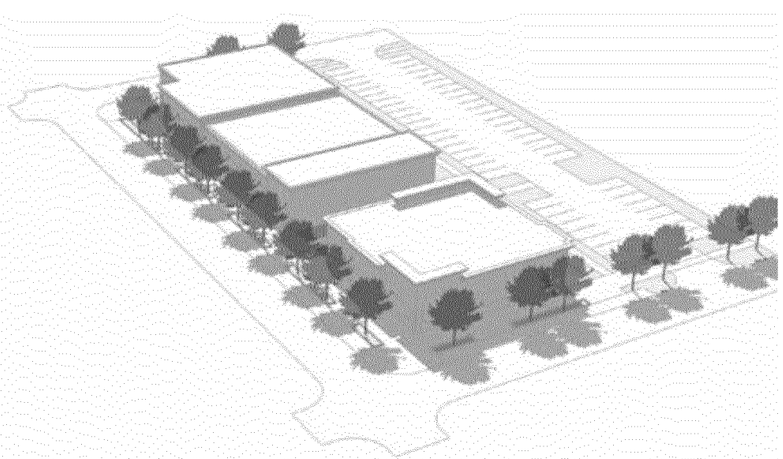
EXISTING PAD-SITE RETAIL PARCEL

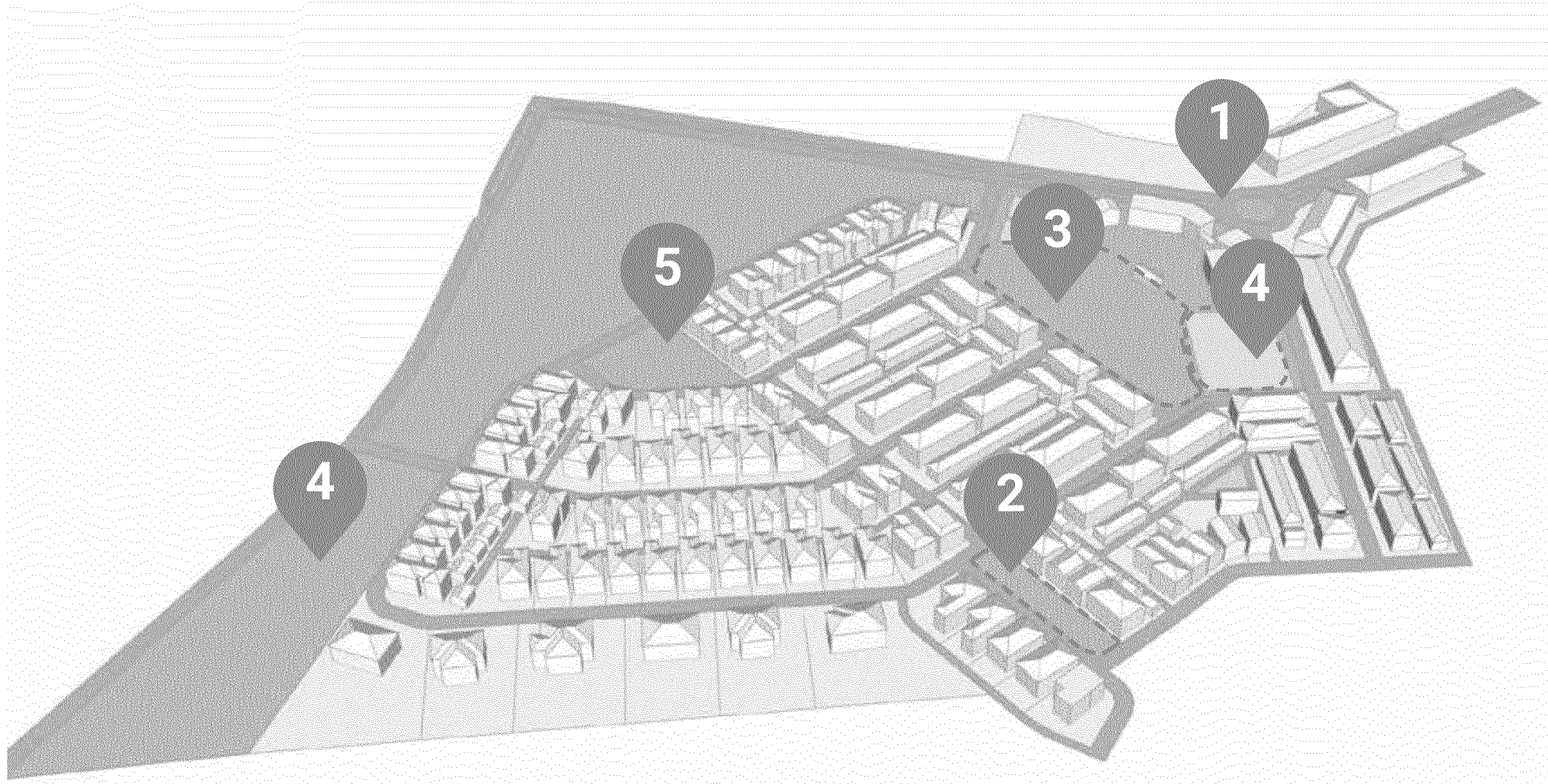


PROPOSED STREET TREES



PROPOSED INFILL DEVELOPMENT

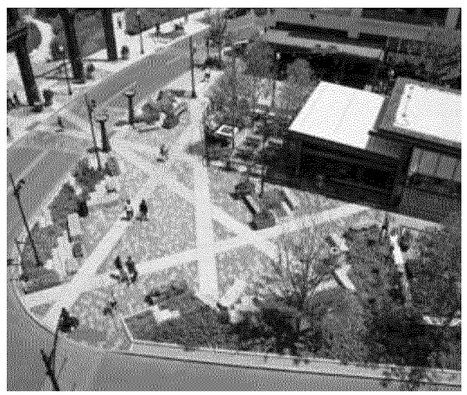




Integrate a Variety of Open Spaces

- » Distribute Open Spaces within the neighborhood / plan area
- » Create usable, memorable spaces that give a sense of place
- » Right-size per open space type (e.g., a square should be 1-2 ac.)
- » Detail the spaces appropriately (e.g., plazas should be largely hardscape; squares and greens should be largely landscape)
- » Provide appropriate amenities such as seating, lighting, shade, etc.

1. PLAZA



2. LINEAR GREEN



3. SQUARE



4. RECREATION



5. NEIGHBORHOOD GREEN



VILLAGE PLACE

Existing Illustrative Site Plan

- Depicts the development and open space patterns
- Indicates 1/4-mile walking radius (5-minute walk)

KEY

- SMALL AREA PLAN (SAP) BOUNDARY
- VILLAGE OF PINEHURST
- BUILDING FOOTPRINTS
- PARKS/ OPEN SPACE



Existing Land Use

- Residential, Parks, and Open Space uses exist in the northern half
- Retail, civic, and industrial uses are located in the southern half closer to the Village Center
- Vacant parcels are interspersed throughout



Overall, Village Place offers a strong opportunity to develop a variety of land uses. Drawing upon the Village Center as inspiration, Village Place can complement what is already part of the community.

Strengths

- Location close to Village Center provides a strong foundation
- Community Center and Cannon Park
- Walkable to Village Center
- Large number of amenities
- Strong brand of Pinehurst
- Some redevelopment already occurring (Pinehurst Brewery)

Weaknesses

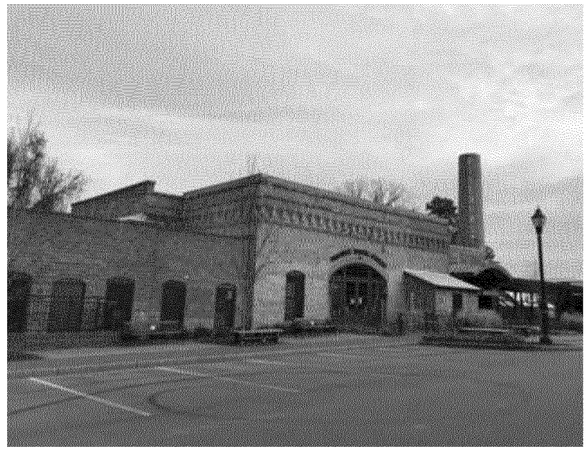
- Some of the properties are older
- Parking challenges
- Limited amount of available land

Opportunities

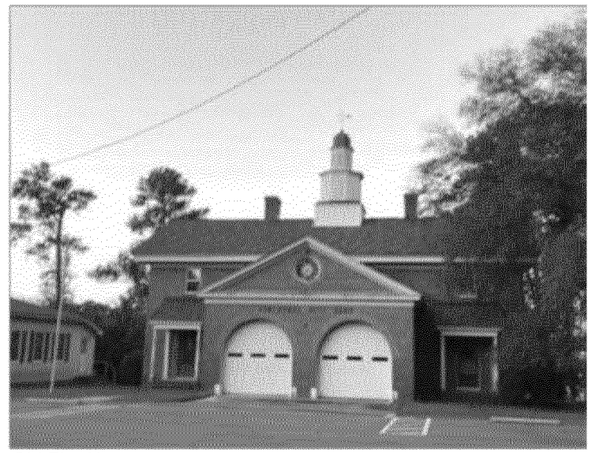
- Build off the success of historic Village Center
- Growth in nearby neighborhoods
- Redevelopment of public works
- Redevelopment of older properties
- Close to NC 211 – build a better gateway

Threats/Challenges

- Inability to create a strong link between Village Core and Village Place
- Not being able to move the tanks and public works



Pinehurst Brewing Company



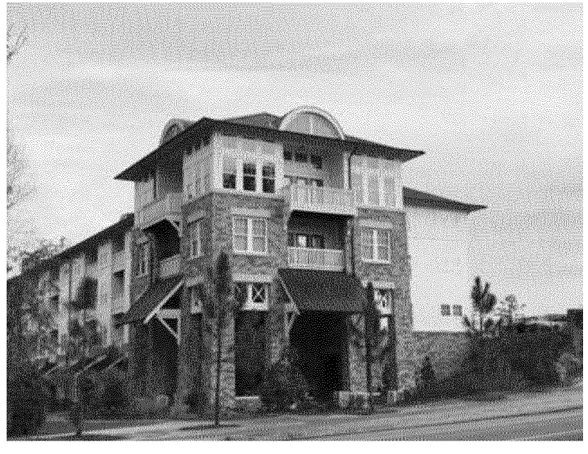
Old Fire House



Community Center



The Village Quarters



The Greens at Arboretum



Single-family detached home

MARKET ANALYSIS

CONCLUSIONS

Summary of Market Opportunity

Land Use	Overall Market Opportunity	Village Place	Pinehurst South
For-Sale Residential	XXXXX	XXXX	XXXX
For-Rent Residential	XXX	XXX	XXX
Retail	XXXX	XXX	XXX
Office	XX	XX	XX
Hospitality	XXX	XXX	XXX
Golf	XX	O	X

Key: XXXXX = best, X = worst, O = none

Summary of Demand

Land Use	Demand Potential	Locations within Pinehurst
For-Sale Residential	80-120 homes/year	Almost anywhere
For-Rent Residential	15-25 units/year	Major roads, VP, PS, Village Cntr
Retail	20-25,000 SF/ every 5 years	Major roads, VP, PS, Village Cntr
Office	Up to 5,000 SF/year	Medical area, VP, PS, Village Cntr
Hospitality	25 rooms/yr. in Moore Co.	Resort, Village Cntr, PS, VP
Golf	2-3 courses over the next 10 years in Moore Co.	Focus Area 1 is the only area with space

Summary of Demand for Land Uses within Planning Areas

Land Use	Village Place	Pinehurst South
For-Sale Residential	Unlimited at build-out 1 project would sell approximately 15-25 homes per year	Unlimited at build-out 1 project would sell approximately 15-25 homes per year
For-Rent Residential	At build-out, 1 to 2 projects of 70-100 units each Timing depends on where else apartments have been constructed (e.g. Village only has demand for 1 project every 5-10 years)	At build-out, 1-2 projects of up to 200 units each, depending on location Timing depends on where else apartments have been constructed
Retail	25,000-50,000 SF at build-out	Up to 80,000 SF with grocery, 40,000 SF without grocery at build-out
Office	25,000 – 30,000 SF at build-out Limited amount per year. 5,000 SF total in Village. Village Place could capture some of that, but likely less than Pinehurst South	Up to 100,000 SF at build-out Limited amount per year. 5,000 SF total in Village. Pinehurst South could capture some of that. Could increase, depending on impact of USGA
Hospitality	At build-out, 1 hotel with 75-100 rooms as well as bed and breakfasts	At build-out, 1 hotel with approximately 100 rooms
Golf	None	Possibly some support functions (although the land probably has a higher and better use than maintenance for golf)

Character:

- Mixed-use and walkable
- Reflective of Village Center (VC); McCaskill south, in particular, should emulate VC in scale, massing, materials, etc.
- Protect, respect, and connect to, but do not compete with/drain VC
- Address “blighted” character
- 1-2 or 1-3 stories (TBD)

Land Use:

- McCaskill south: Mixed-Use similar scale as VC; focus Restaurants and Retail here, with some office
- New infill development requires the relocation of the VOP Public Services Complex
- Address Parking
- McCaskill north: Mixed-Use along Rattlesnake Trail; explore variety of Residential types (including cottages, townhouses, live-work, and missing middle res.) and infill Commercial (mainly Office)
- Incorporate new small Open Spaces, to supplement and connect to existing larger Open Spaces (well-supplied)

Transportation:

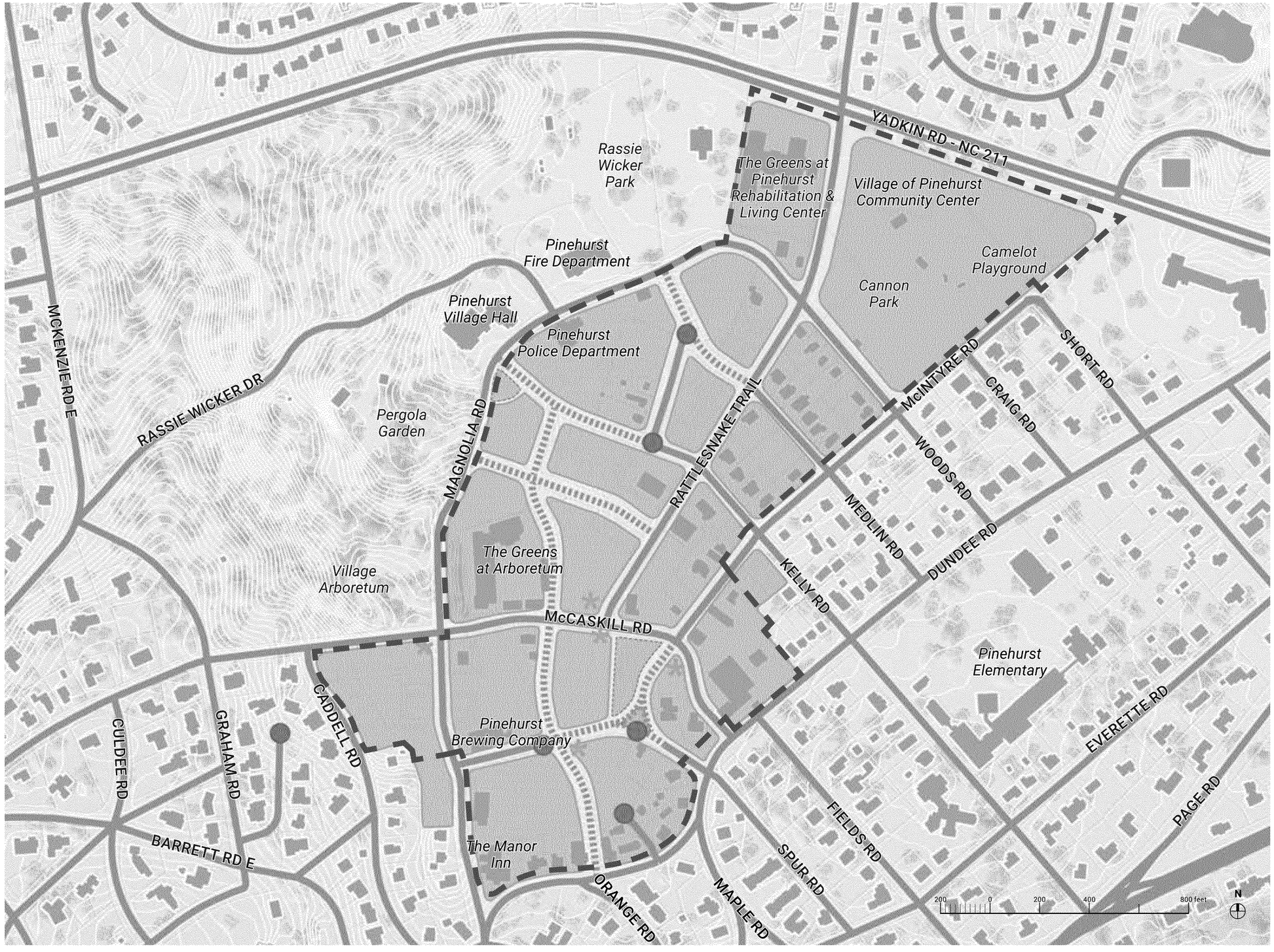
- Interest in connecting area north of McCaskill to VC, but likely not a direct vehicular connection
- Explore crossing streets through McCaskill south area, connecting to Power Plant Road, Spur Road, and McIntyre Road
- Explore street extensions of Medlin Road, Kelly Road, etc. west of Rattlesnake Trail
- Study streetscape improvements along Rattlesnake Trail [gave feedback on VOP Rattlesnake/Woods Sidewalk Plans]
- Connect trails and destinations
- Choose sidewalk locations with consideration of existing Single-Family frontage

Parti/Block Diagram

- The Parti diagram illustrates the Approach in plan form
- The diagram shows the proposed addition of new streets, forming new blocks and creating a more connected street network
- Potential new infill building locations are shown in black and echo the adjacent existing development

KEY

- SMALL AREA PLAN (SAP) BOUNDARY
- VILLAGE OF PINEHURST
- EXISTING ROADS
- PROPOSED ROADS
- EXISTING DEAD END
- EXISTING PARKS/ OPEN SPACE
- PROPOSED PARKS/ OPEN SPACE
- PROPOSED BLOCKS
- PROPOSED PROMINENT BUILDING LOCATION



Existing Street Network

- Village Place is well connected to a range of arterials.
- Yadkin Road - NC 211 lines the north side of the study area boundary providing direct access to US 501 just east of the study area.
- Neighborhood streets are organic and somewhat disconnected due to large, undeveloped land areas and topographic conditions in the study area.

KEY

- SMALL AREA PLAN (SAP) BOUNDARY
- VILLAGE OF PINEHURST
- EXISTING ROADS
- EXISTING DEAD END

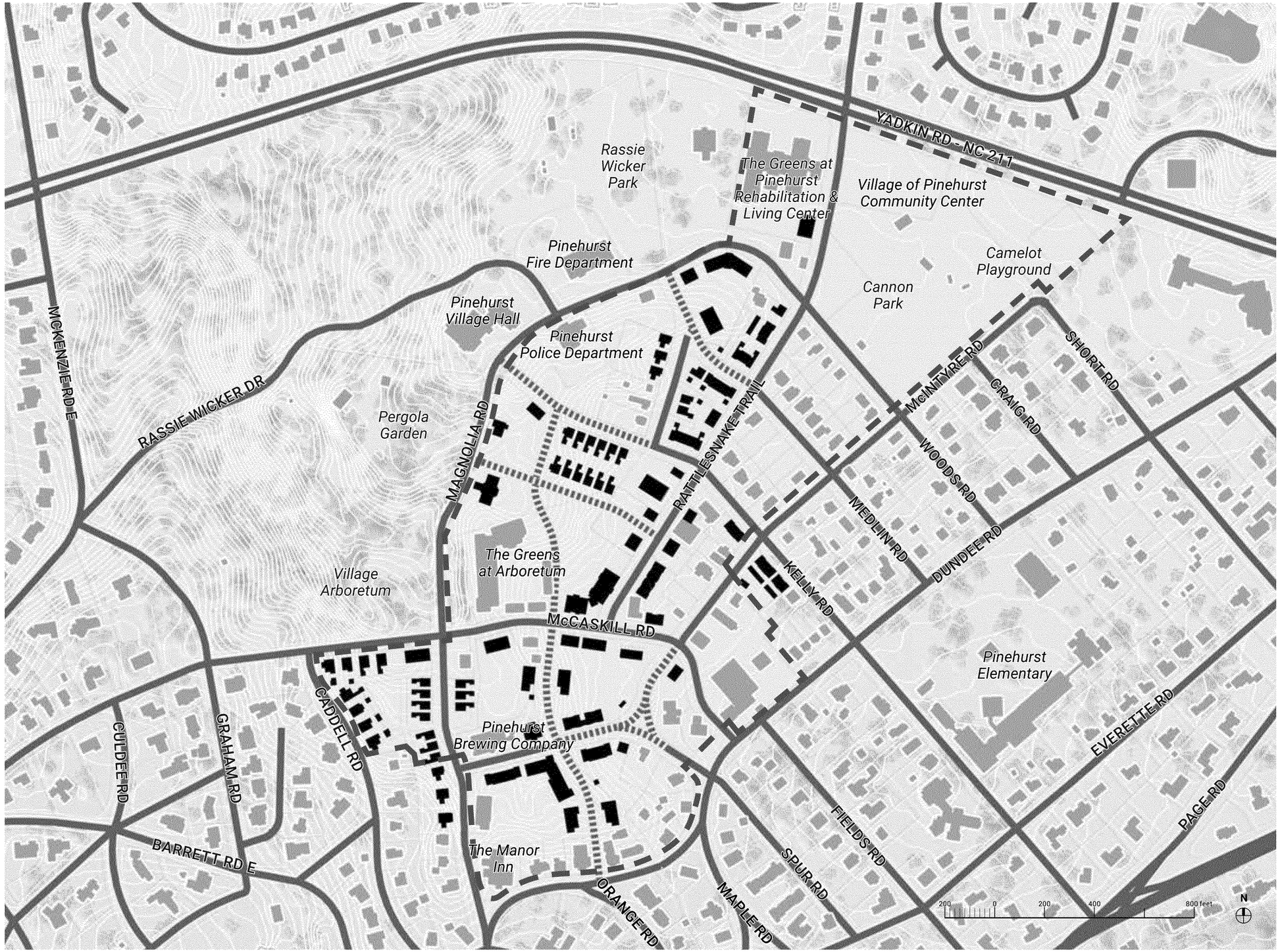


Proposed Street Network

- Extension of Medlin Road and Kelly Road
- Potential connection from The Greens towards Village Hall
- Two new streets south of McCaskill Road. The N-S street offsets from Rattlesnake and connects either to Orange Rd or to Power Plant Rd. The E-W street connects near the Brewery to McIntyre Rd.

KEY

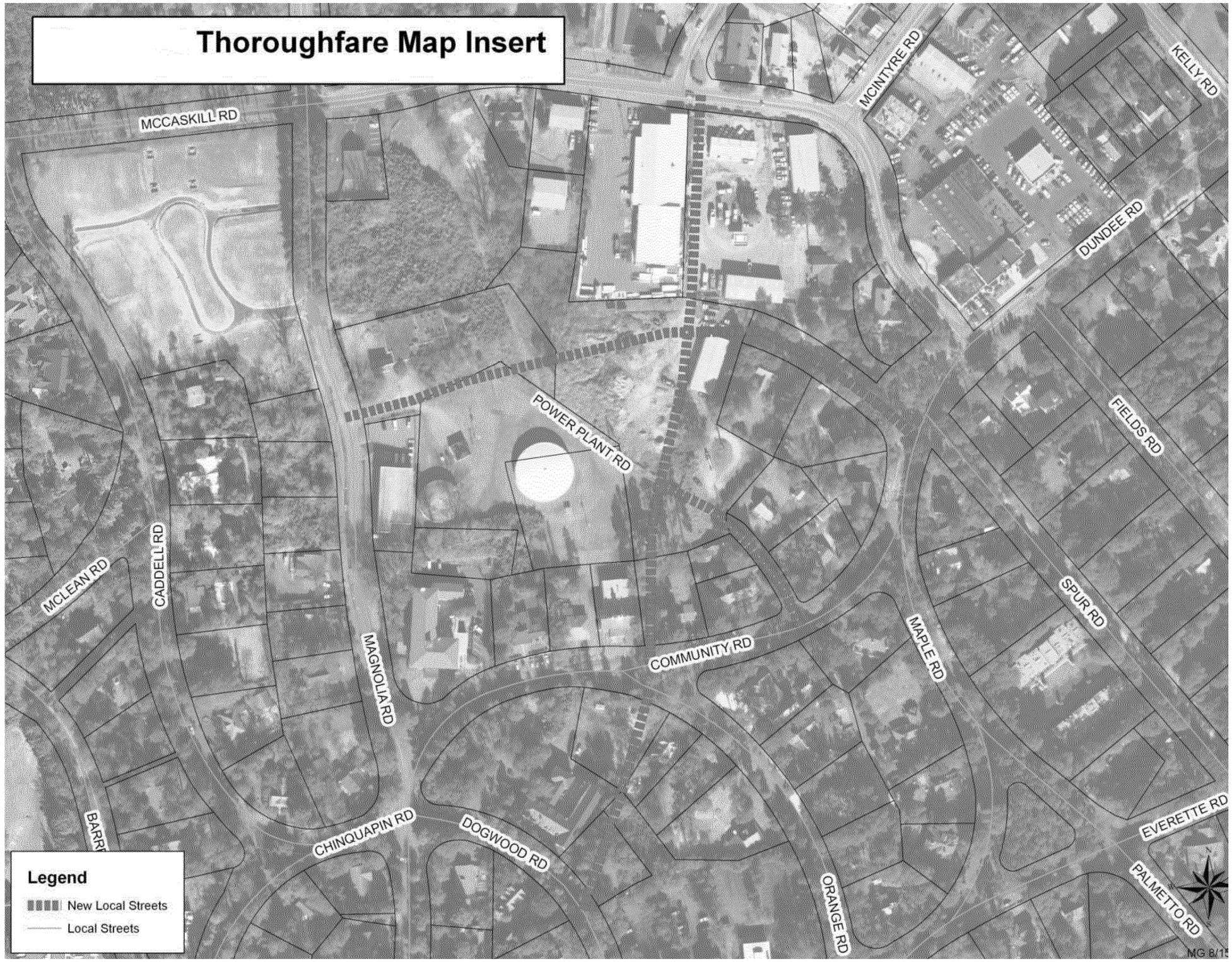
- SMALL AREA PLAN (SAP) BOUNDARY
- VILLAGE OF PINEHURST
- EXISTING ROADS
- PROPOSED ROADS



This plan is illustrative only and subject to change. Source: Design Collective, Inc.

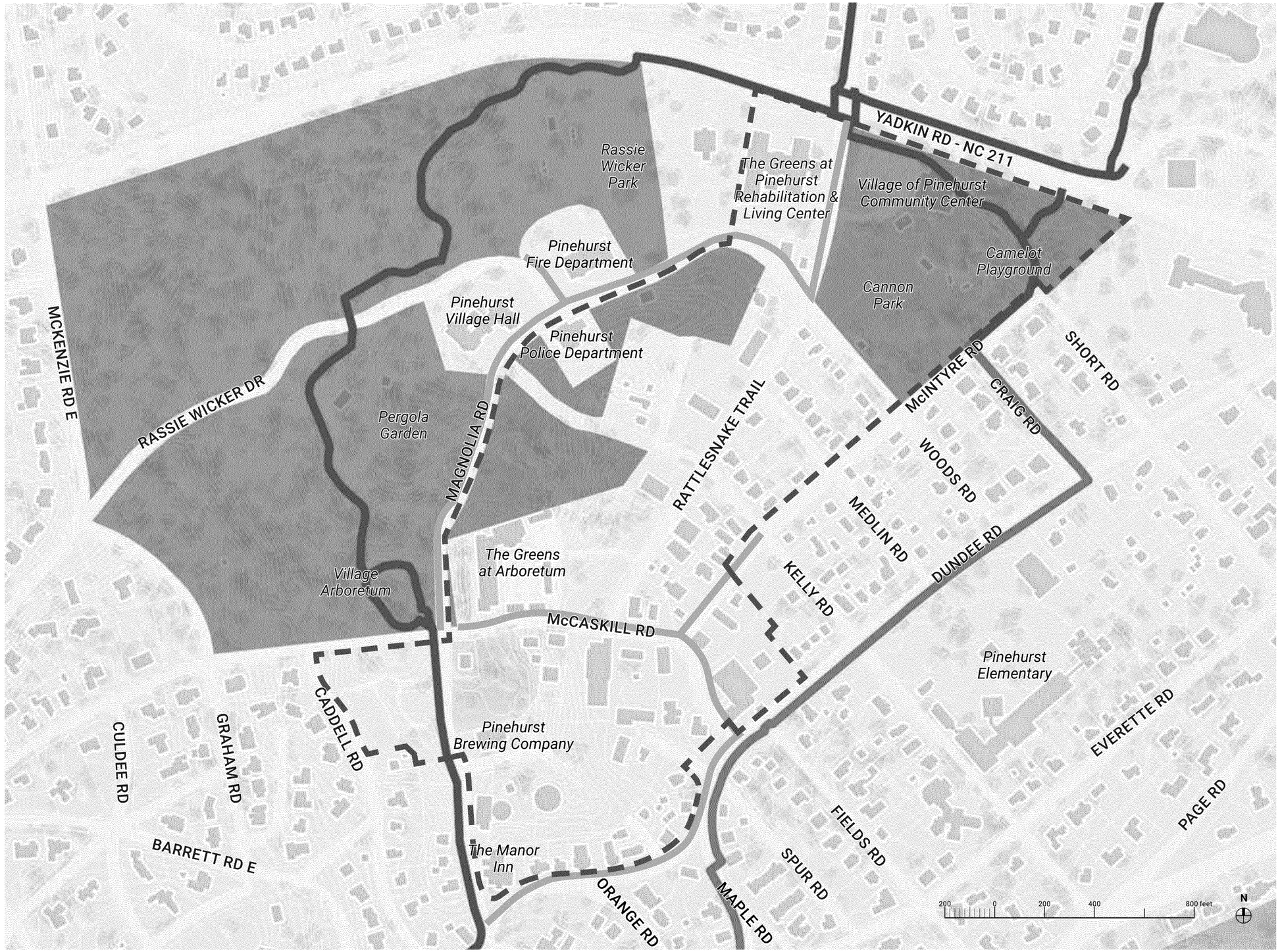
2011 Pinehurst Thoroughfare Plan

- While the SAP builds on the 2011 Thoroughfare Plan and the 2019 Comp Plan, showing new streets south of McCaskill Road, there are some key differences
- The proposed N-S street does not directly align with Rattlesnake nor continue to Dogwood and the configuration emulates the Olmsted street and block form



Existing Open Space + Pedestrian Network

- Variety of active and passive parks and gardens
- Cannon Park is 15-acre recreation and play space
- Rassie Wicker Park is 103 acres with recreational amenities, 33-acre arboretum, and gardens
- Network of greenway trails, walkway trails, and sidewalks

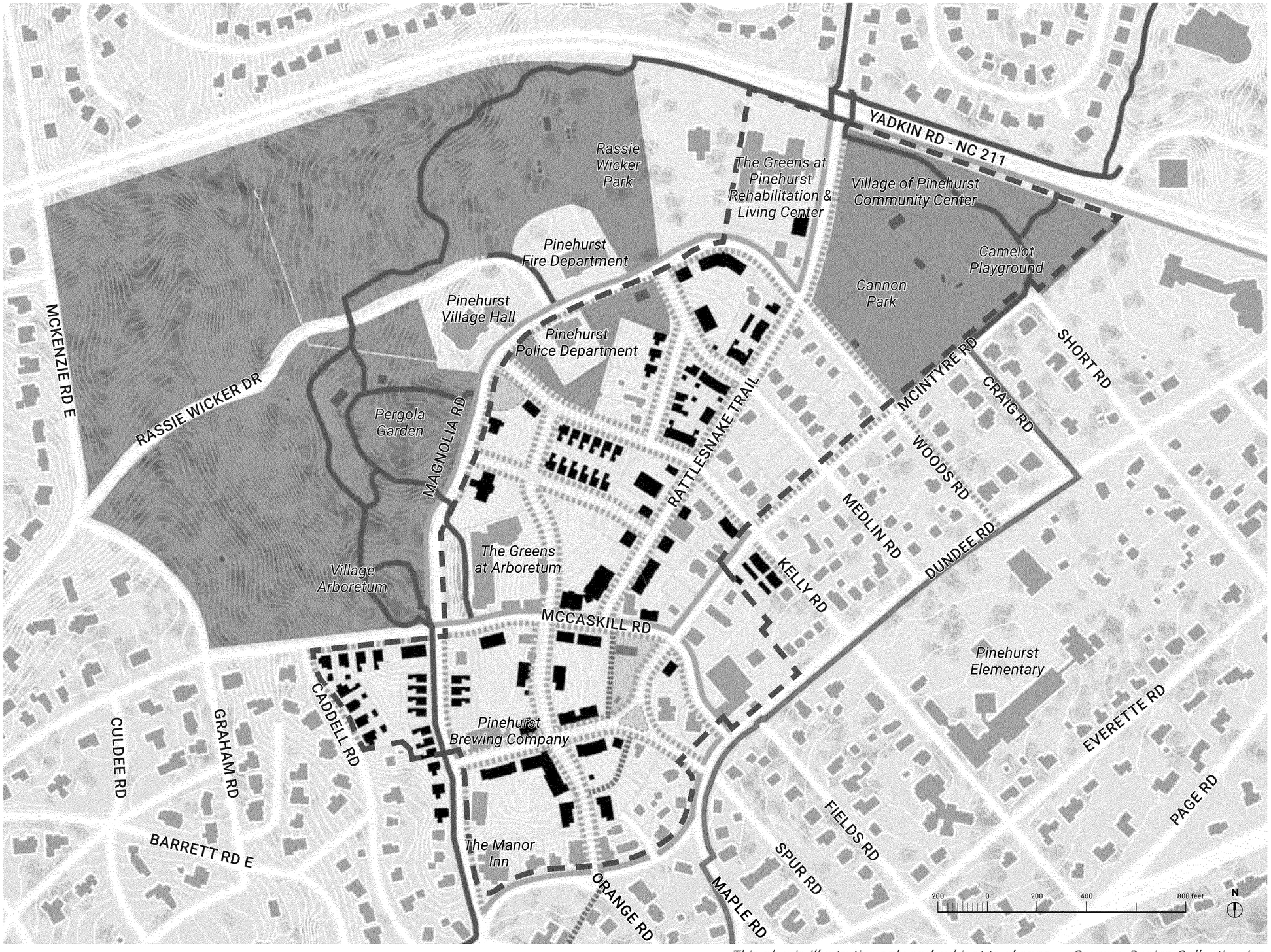


Proposed Open Space + Pedestrian Network

- While the existing area of Village Place is well served by Open Space, new development should add to the network, creating new publicly-accessible greens, plazas, and potentially an amphitheater located near the Village Hall and Arboretum.

KEY

- SMALL AREA PLAN (SAP) BOUNDARY
- VILLAGE OF PINEHURST
- EXISTING GREENWAY TRAILS
- EXISTING WALKWAY TRAILS
- PROPOSED WALKWAY TRAILS
- EXISTING SIDEWALKS
- PROPOSED BRICK SIDEWALKS
- EXISTING PARKS/ OPEN SPACE
- PROPOSED PARKS/ OPEN SPACE



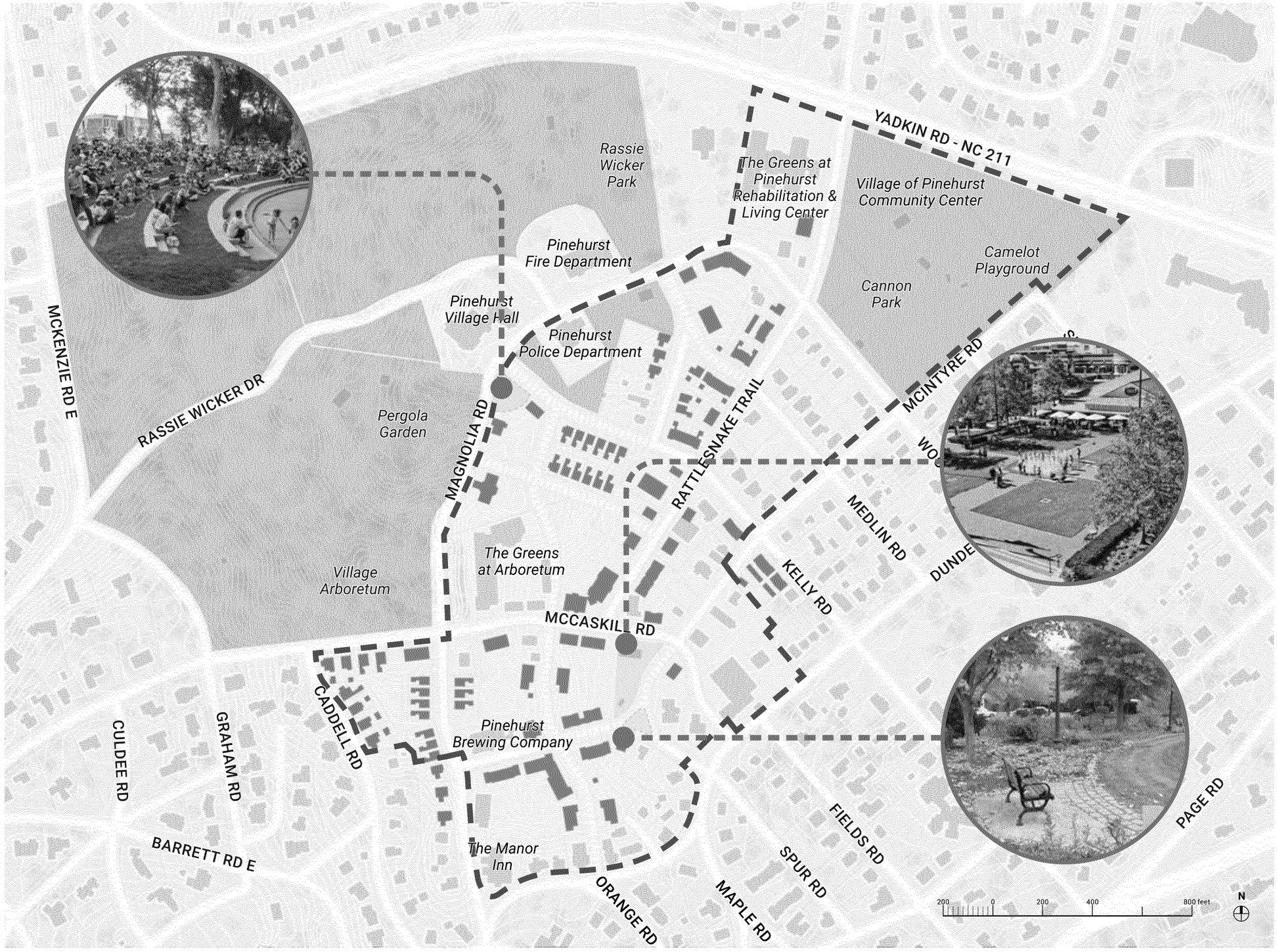
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KEY

- SMALL AREA PLAN (SAP) BOUNDARY
- VILLAGE OF PINEHURST
- EXISTING PARKS/ OPEN SPACE
- PROPOSED PARKS/ OPEN SPACE



This plan is illustrative only and subject to change. Source: Design Collective, Inc.

Proposed Amphitheater

- An amphitheater is envisioned near the Village Hall and Arboretum, taking advantage of the sloping topography
- Deep tiers cascade towards a performance area, providing seating for spectators or for reflection and rest
- Trees are placed within the tiers to offer shade and a park-like feel



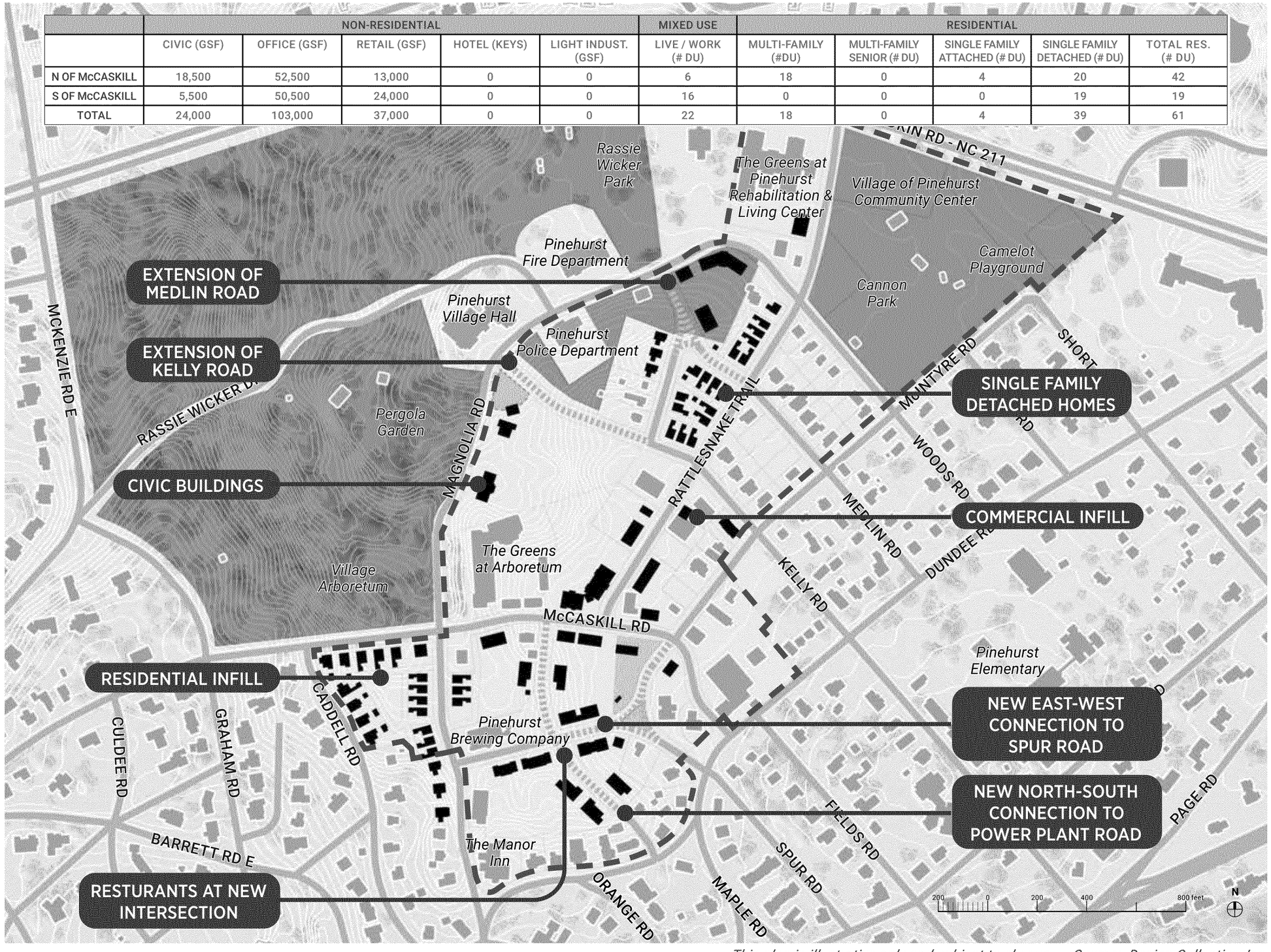


This rendering is illustrative only and subject to change. Source: Design Collective, Inc.

Low Intensity Plan Option

- The Low Intensity Plan illustrates the potential build-out of Village Place over 20+ years.
- Small scale commercial and residential infill vacant or underutilized parcels, reflective of the character of the Village with a focus south of McCaskill Road, near the Brewery and the Village Center.

	NON-RESIDENTIAL					MIXED USE	RESIDENTIAL				
	CIVIC (GSF)	OFFICE (GSF)	RETAIL (GSF)	HOTEL (KEYS)	LIGHT INDUST. (GSF)	LIVE / WORK (# DU)	MULTI-FAMILY (#DU)	MULTI-FAMILY SENIOR (# DU)	SINGLE FAMILY ATTACHED (# DU)	SINGLE FAMILY DETACHED (# DU)	TOTAL RES. (# DU)
N OF McCASKILL	18,500	52,500	13,000	0	0	6	18	0	4	20	42
S OF McCASKILL	5,500	50,500	24,000	0	0	16	0	0	0	19	19
TOTAL	24,000	103,000	37,000	0	0	22	18	0	4	39	61



KEY

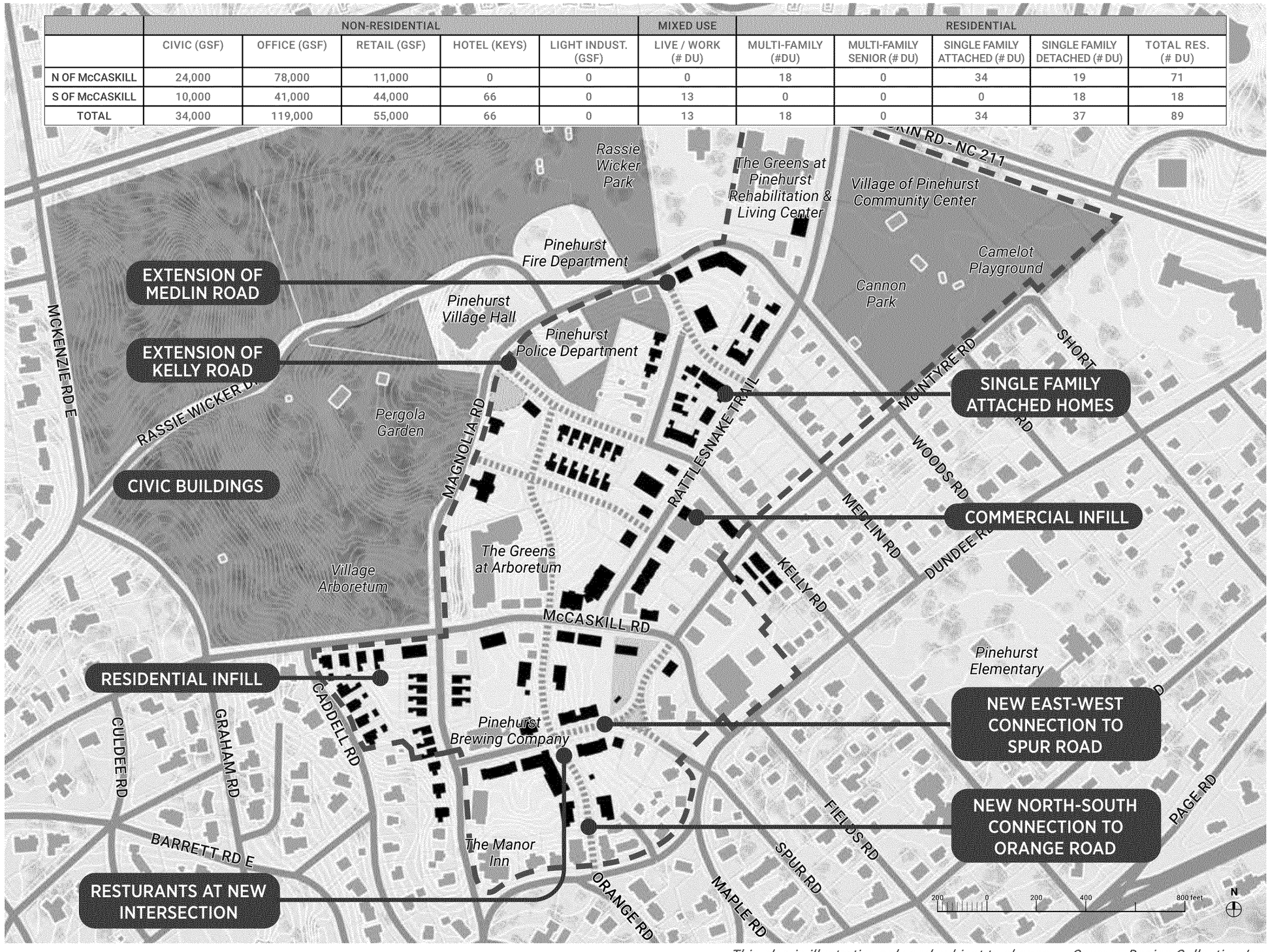
- SMALL AREA PLAN (SAP) BOUNDARY
- VILLAGE OF PINEHURST
- EXISTING ROADS
- PROPOSED ROADS
- PROPOSED ALLEYS
- EXISTING PARKS/OPEN SPACE
- PROPOSED PARKS/OPEN SPACE

This plan is illustrative only and subject to change. Source: Design Collective, Inc.

High Intensity Plan Option

- The High Intensity Plan illustrates the potential build-out of Village Place over 30 years.
- As with the Low Intensity Plan, small scale commercial and residential infill vacant or underutilized parcels.
- This option differs in the new street alignments, a higher percent of SFA, and moderately increased commercial infill

	NON-RESIDENTIAL					MIXED USE	RESIDENTIAL				
	CIVIC (GSF)	OFFICE (GSF)	RETAIL (GSF)	HOTEL (KEYS)	LIGHT INDUST. (GSF)	LIVE / WORK (# DU)	MULTI-FAMILY (#DU)	MULTI-FAMILY SENIOR (# DU)	SINGLE FAMILY ATTACHED (# DU)	SINGLE FAMILY DETACHED (# DU)	TOTAL RES. (# DU)
N OF McCASKILL	24,000	78,000	11,000	0	0	0	18	0	34	19	71
S OF McCASKILL	10,000	41,000	44,000	66	0	13	0	0	0	18	18
TOTAL	34,000	119,000	55,000	66	0	13	18	0	34	37	89



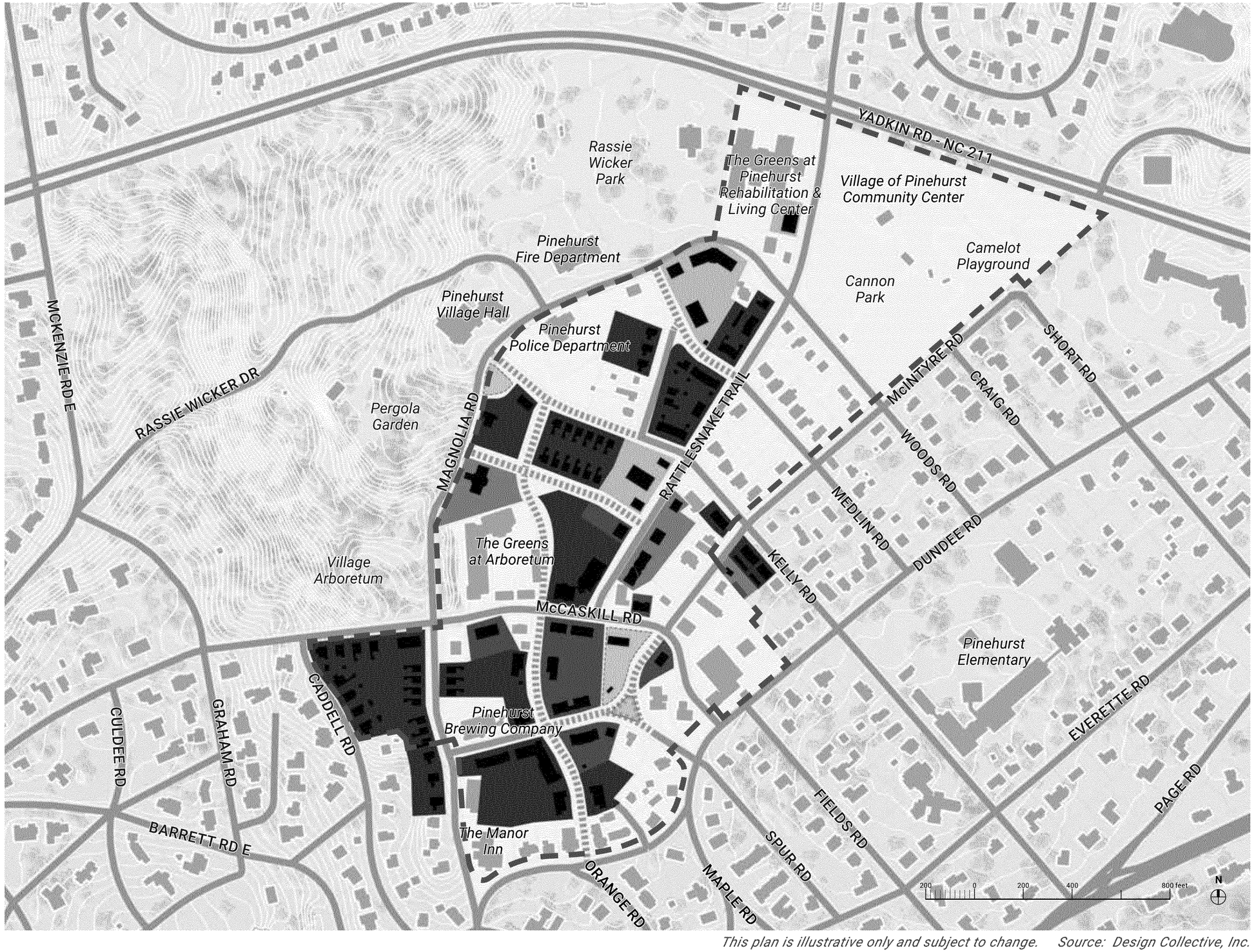
This plan is illustrative only and subject to change. Source: Design Collective, Inc.

Phasing Absorption Plan

- This plan diagram shows the likely absorption time frames for the High Intensity Plan option, based on the SAP Market Analysis

KEY

- SMALL AREA PLAN (SAP) BOUNDARY
- VILLAGE OF PINEHURST
- EXISTING ROADS
- PROPOSED ROADS
- PROPOSED ALLEYS
- 0-5 YEARS
- 5-10 YEARS
- 10-20 YEARS
- 20-30 YEARS



This plan is illustrative only and subject to change. Source: Design Collective, Inc.

Residential A1



Multi-Family

Residential A2



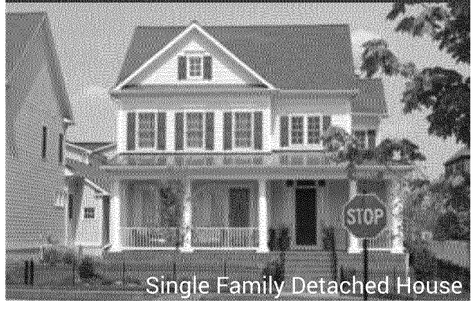
Single Family Attached House

Residential A3



Single Family Detached House

Residential A4



Single Family Detached House

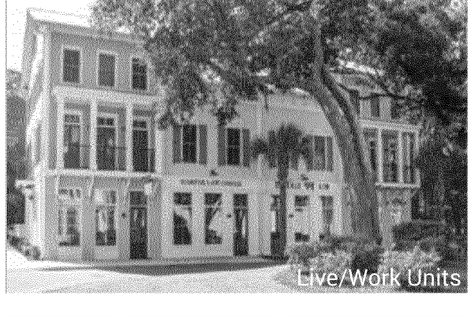
Residential A5



Single Family Detached House

ARCHITECTURE

Commercial: Mixed-Use B1



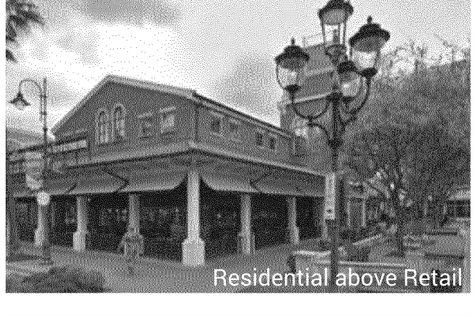
Live/Work Units

Commercial: Mixed-Use B2



Live/Work Units

Commercial: Mixed-Use B3



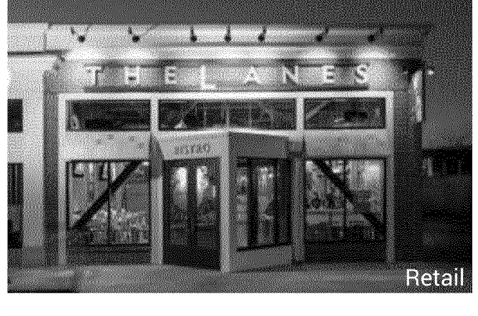
Residential above Retail

Commercial: Mixed-Use B4



Mixed-Use - Hotel above Retail/Restaurant

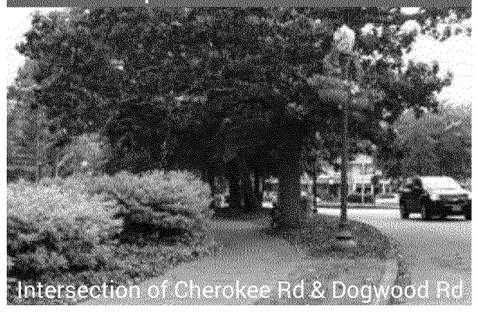
Commercial: Retail B5



Retail

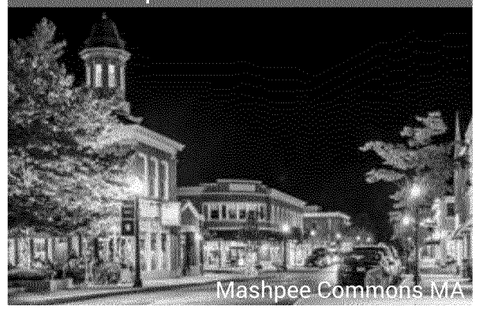
STREETSCAPE/ PARKING

Streetscape C1



Intersection of Cherokee Rd & Dogwood Rd

Streetscape C2



Mashpee Commons MA

Streetscape C3



Mashpee Commons MA

Parking: Angled C4



Market Square

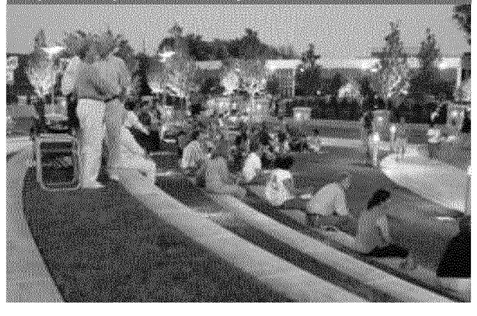
Parking: Parallel C5



Market Square

PARKS/ OPEN SPACE

Open Space: Amphitheater D1



Open Space: Attached Green D2



Open Space: Plaza D3



Open Space: Market D4

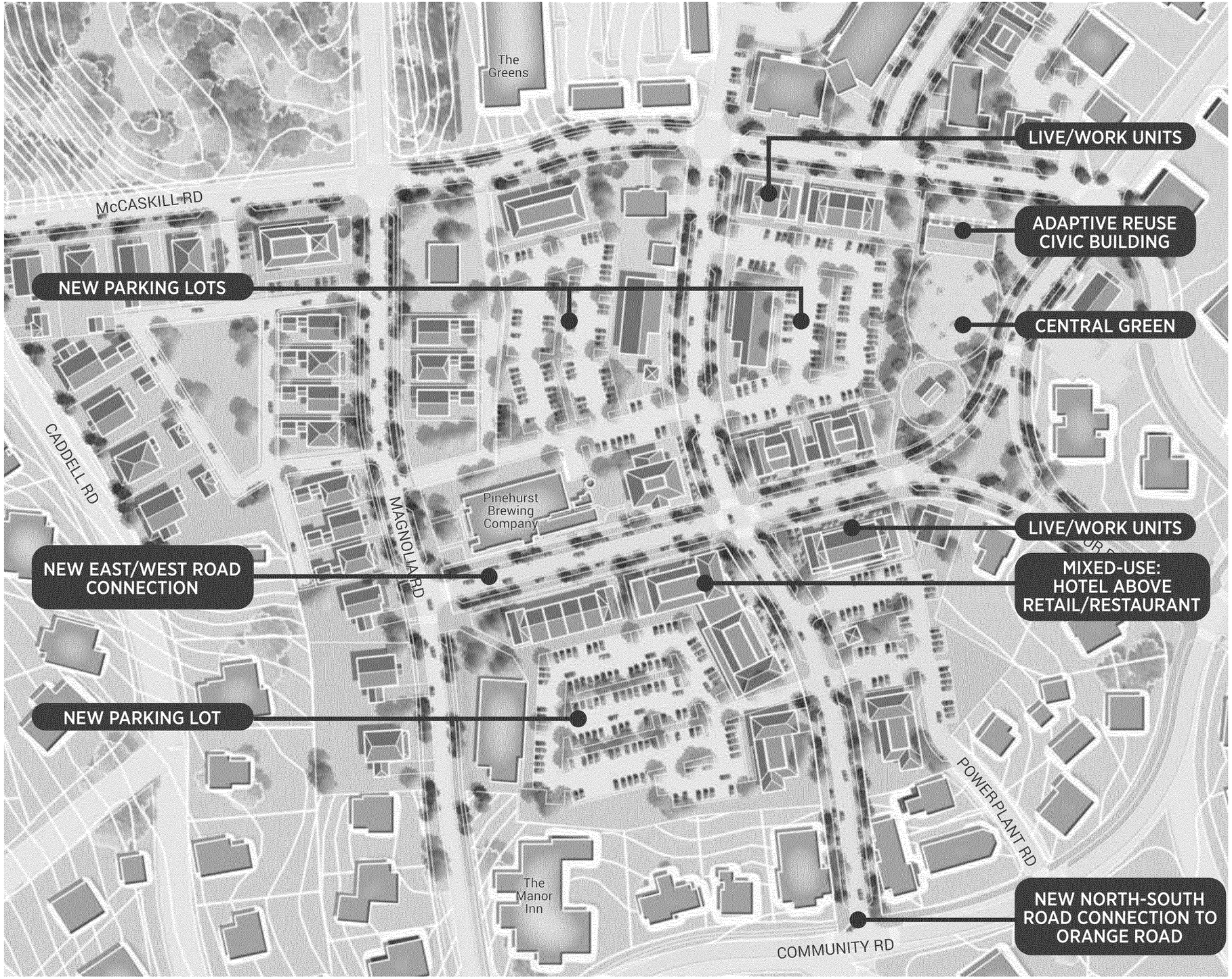


Open Space: Plaza D5



Detail Plan

- The Detail Plan illustrates the potential build-out on the area south of McCaskill Road, showing new buildings, streets, parking, open and landscape
- At the core, two new streets cross the area; at their intersection, new Restaurants, a Hotel, Live/Work units, and Professional Offices congregate



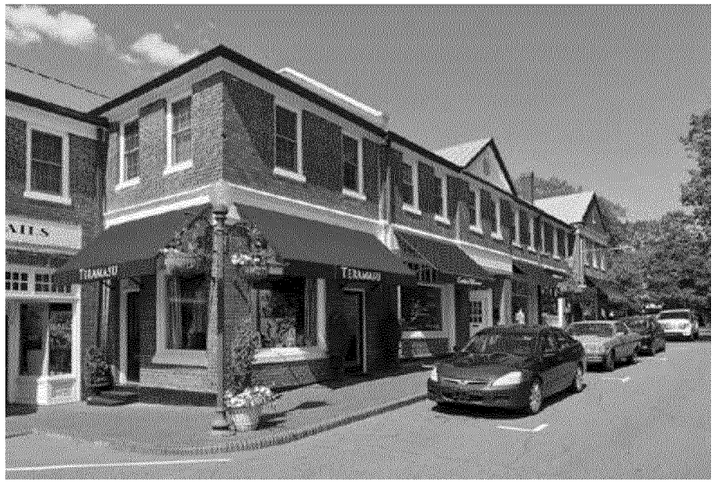
This plan is illustrative only and subject to change. *Source: Design Collective, Inc.*

Typical Commercial Street Section

- The Typical Commercial Street Section is a two-way, two-lane street with parallel parking, street trees and groundcover in SWM planters or tree pits, a 5’ min. clear pedestrian zone, and a storefront zone for tables, chairs, potted plants, and displays.
- To reflect the character of the Village Center, within the Village Place area, brick sidewalks are recommended, along with the Village’s standard benches and street lights
- Within Pinehurst South, brick sidewalks are preferred (not required), uniform street lights and furnishings shall be installed but may be of a compatible, contemporary design of durable materials (to be selected)

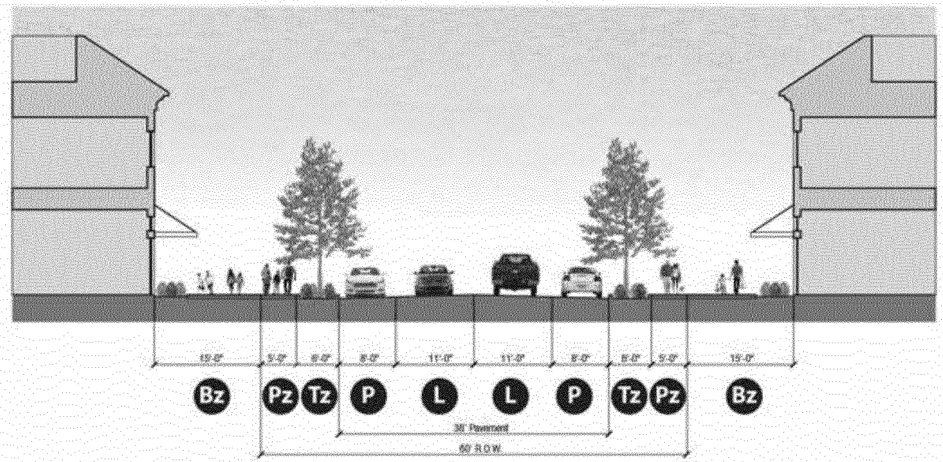
STREET SECTION KEY

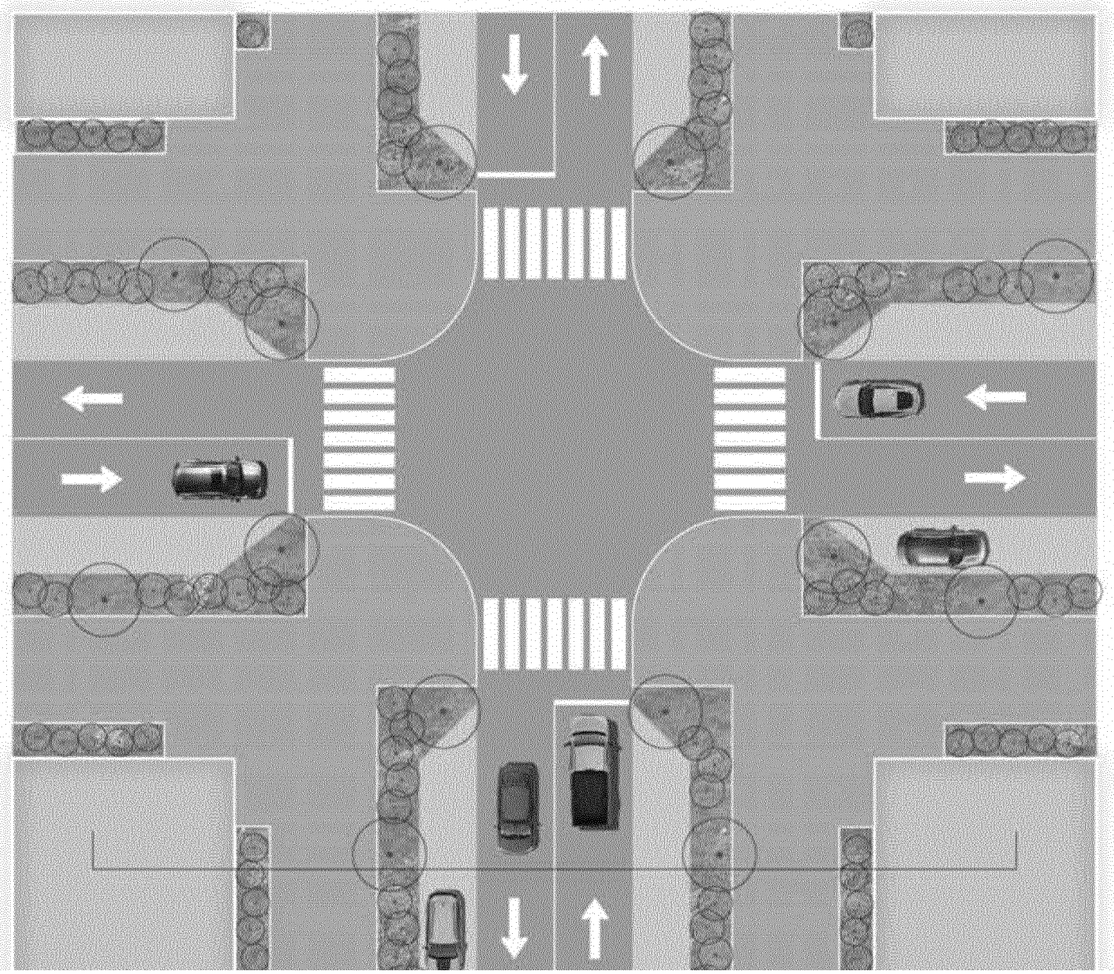
- BZ — BUILDING ZONE
- S — SHOULDER
- PZ — PEDESTRIAN ZONE (SIDEWALK)
- TZ — TREE ZONE (PLANTING STRIP)
- P — PARKING (PARALLEL)
- L — TRAVEL LANES (VEHICULAR)
- D — DRIVEWAY





Typical Commercial





Typical Residential Street Section

- The Typical Residential Street Section is a two-way, two-lane street with parallel parking, street trees and groundcover in SWM planters or tree lawns, a 5’ min. clear pedestrian zone.
- To reflect the character of the Village Center, within the Village Place area, brick sidewalks are recommended, along with the Village’s standard street lights
- Within Pinehurst South, brick sidewalks are preferred (not required), uniform street lights and furnishings shall be installed but may be of a compatible, contemporary design of durable materials (to be selected)

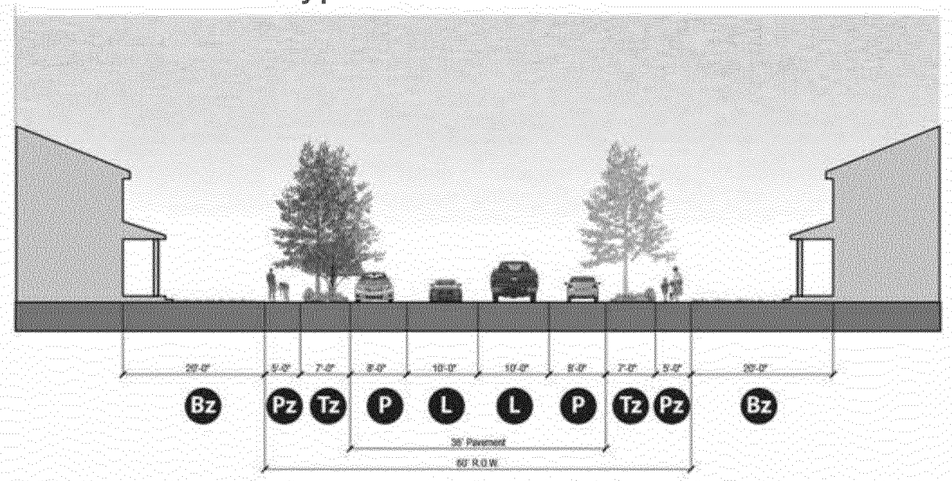
STREET SECTION KEY

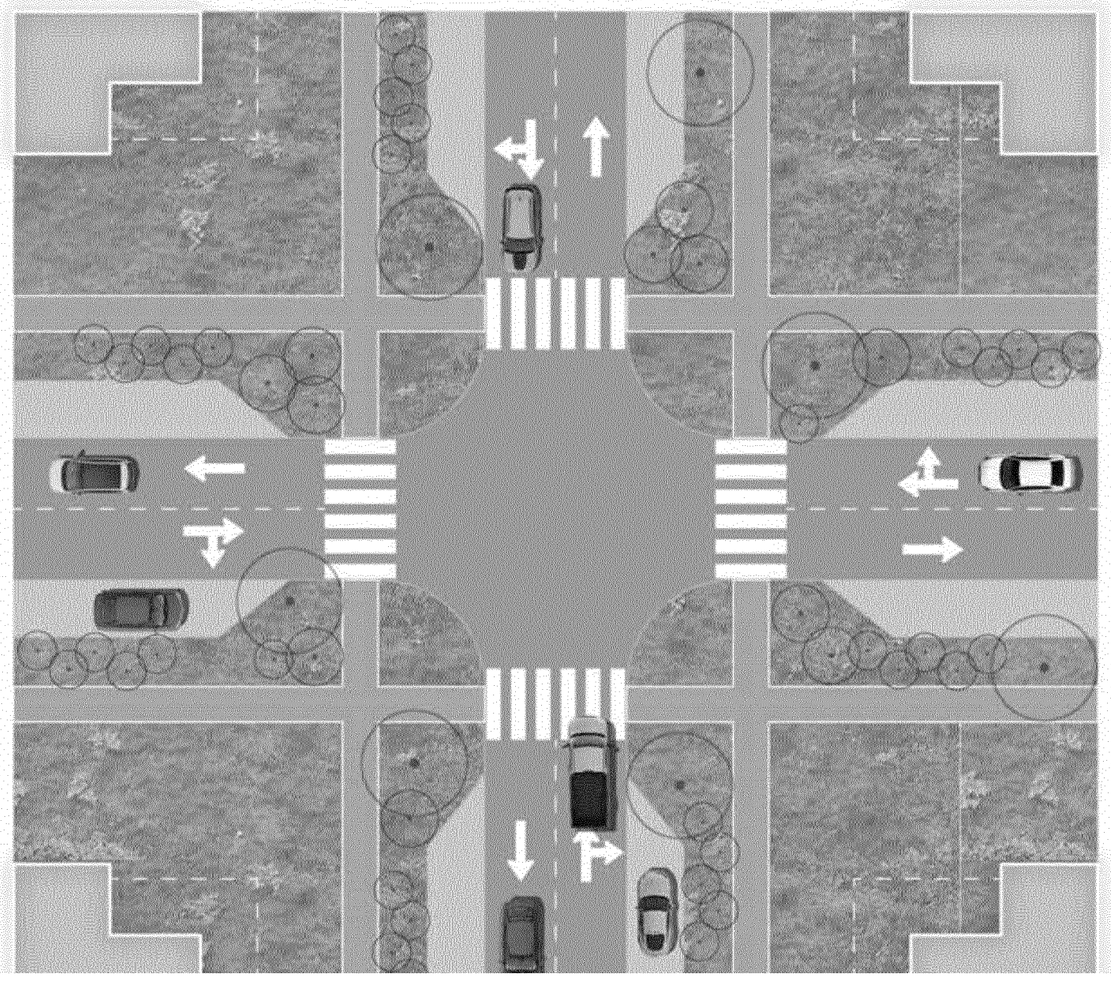
- BZ — BUILDING ZONE
- S — SHOULDER
- PZ — PEDESTRIAN ZONE (SIDEWALK)
- TZ — TREE ZONE (PLANTING STRIP)
- P — PARKING (PARALLEL)
- L — TRAVEL LANES (VEHICULAR)
- D — DRIVEWAY





Typical Residential





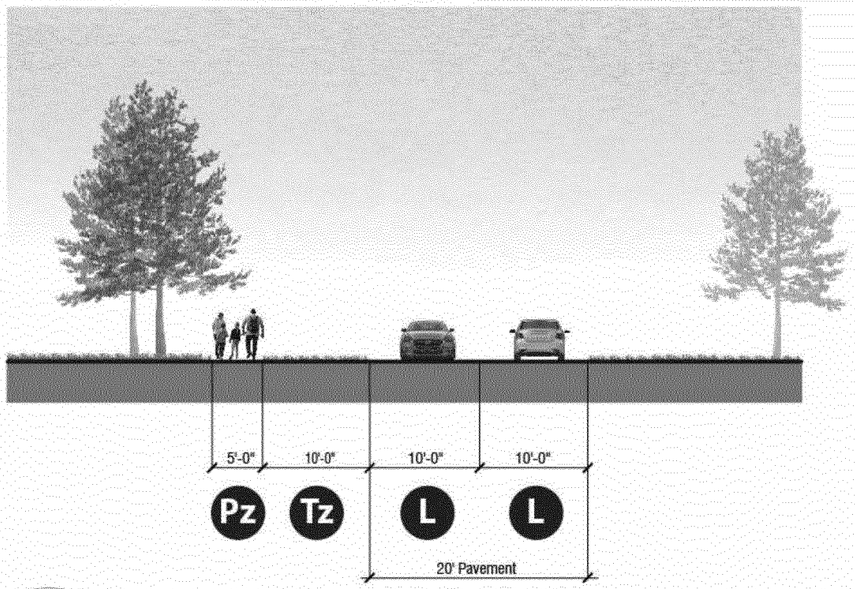
Rattlesnake Trail Street Section

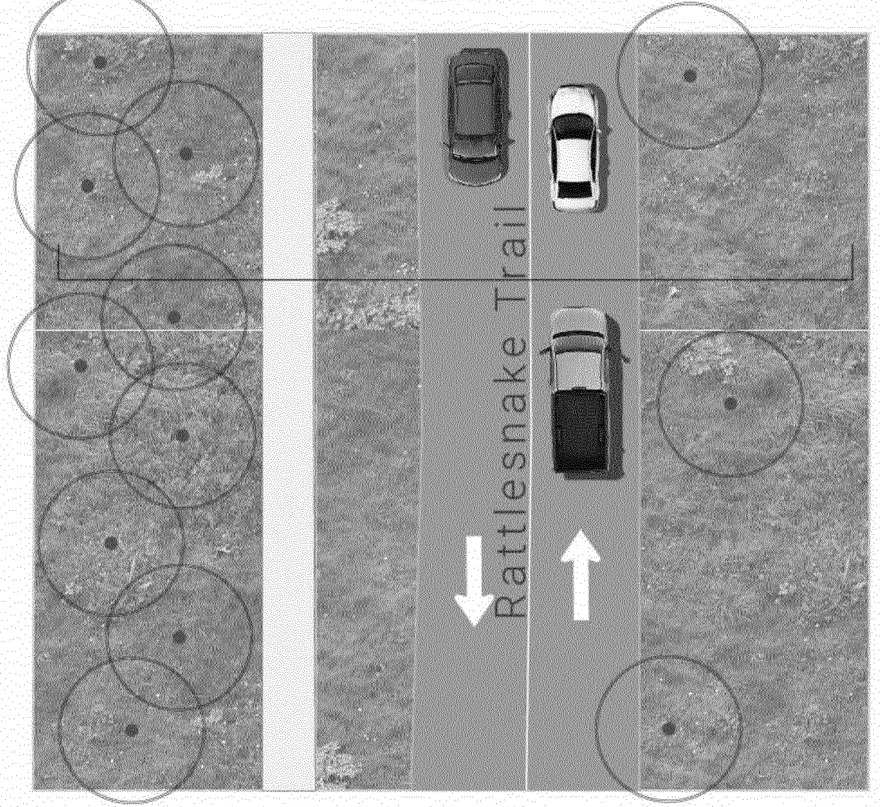
- The proposed Rattlesnake Trail section envisions adding a brick sidewalk to the east side, along with clustered evergreens and deciduous trees and groundcover plantings in a tree lawns
- Parallel parking may be incorporated along Cannon Park

STREET SECTION KEY

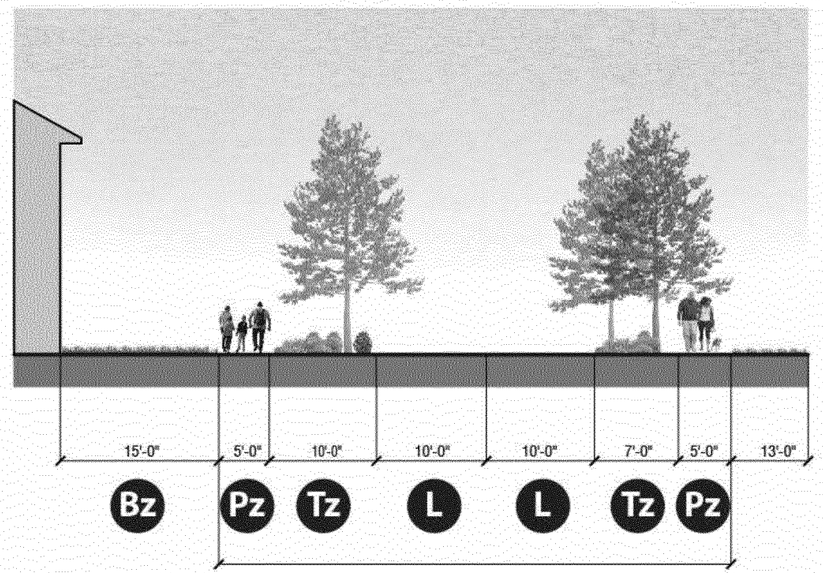
- BZ BUILDING ZONE
- S SHOULDER
- PZ PEDESTRIAN ZONE (SIDEWALK)
- TZ TREE ZONE (PLANTING STRIP)
- P PARKING (PARALLEL)
- L TRAVEL LANES (VEHICULAR)
- D DRIVEWAY

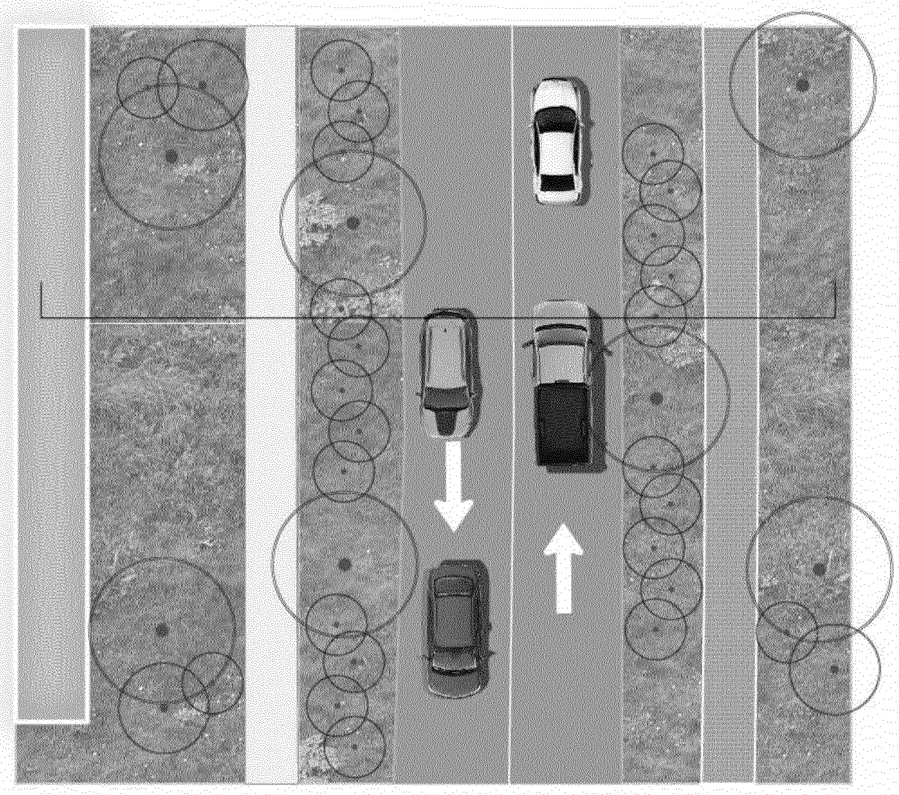
Existing

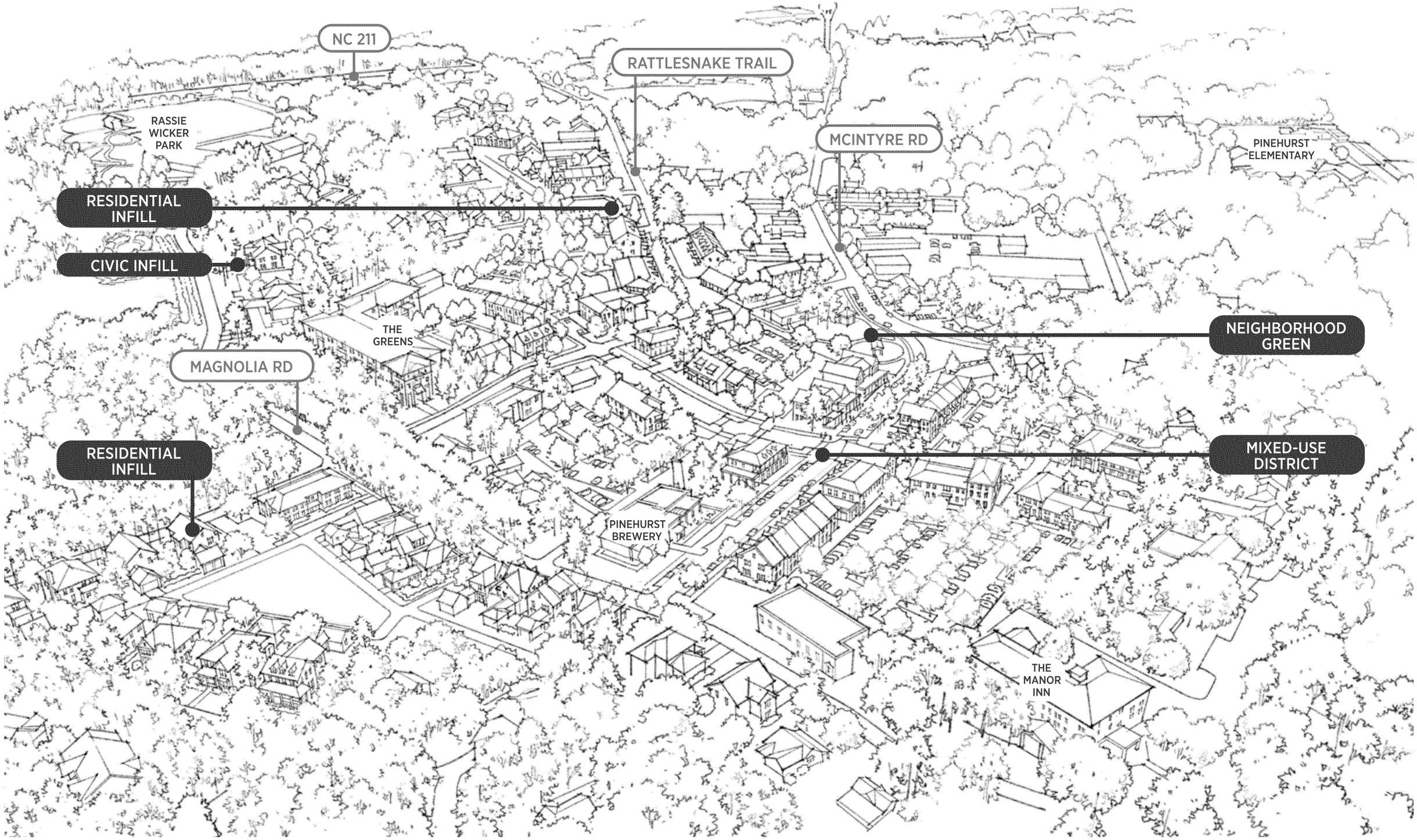




Proposed

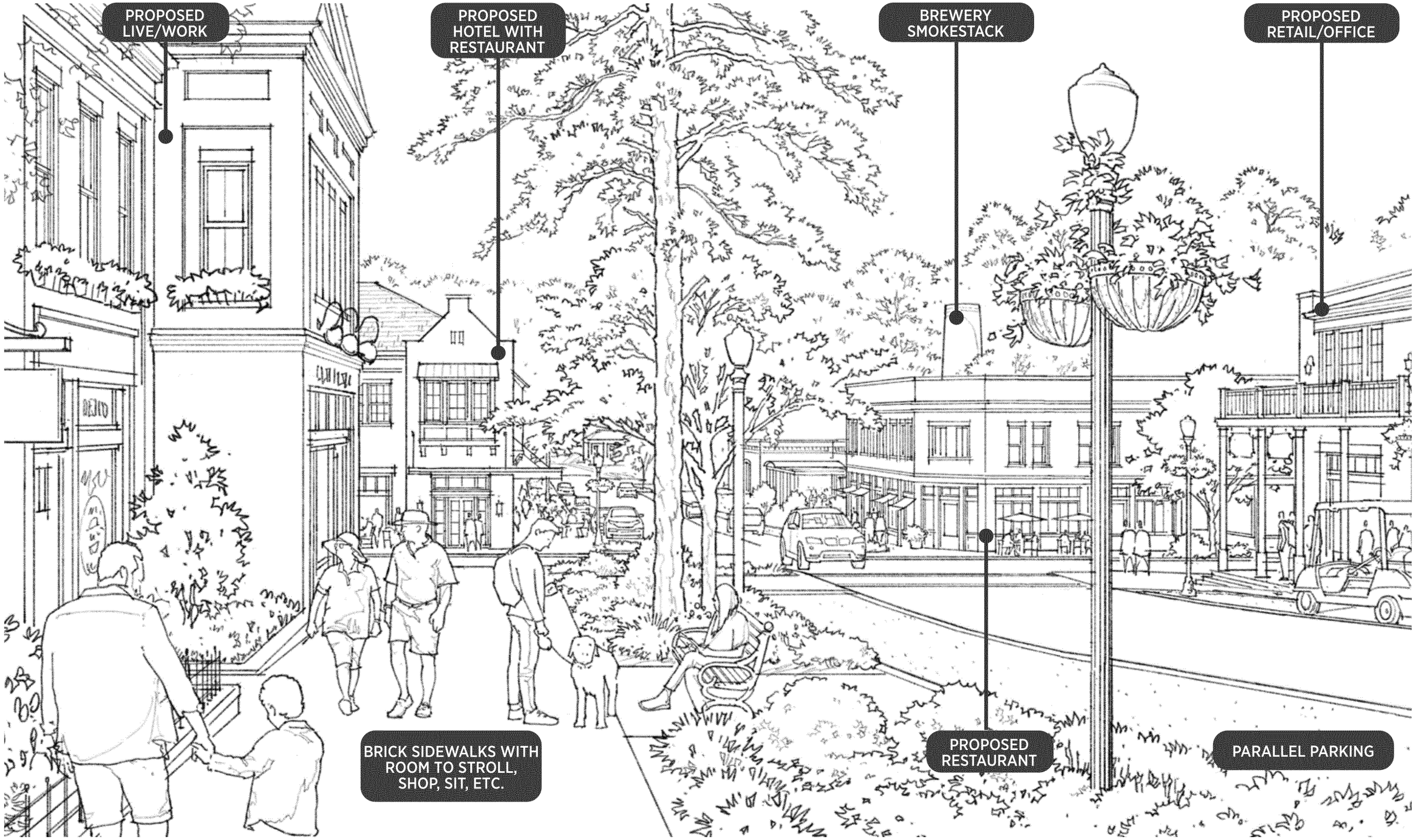






VILLAGE PLACE - AERIAL RENDERING

This rendering is illustrative only and subject to change. *Source: Design Collective, Inc. & Zanetta Illustration*



VILLAGE PLACE - EYE LEVEL RENDERING

This rendering is illustrative only and subject to change. *Source: Design Collective, Inc. & Zanetta Illustration*

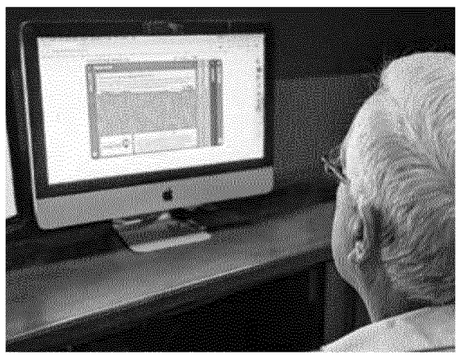
BREAK-OUT ROOM DISCUSSIONS

BREAK-OUT ROOM DISCUSSIONS









- 8-10 people per break-out room
- Facilitator in each break-out room
- Plan options, street sections, and precedent images in each break-out room
- 30 to 40-minute discussion
- Goal: Tell us your thoughts on the proposed plan options, street sections, and precedent images; listen to other stakeholders' input; and determine consensus.



PINEHURST SOUTH

Pinehurst South Polling Results

The Public Workshop included two rounds of Polling Questions, one for Village Place and one for Pinehurst South. The polls were available live during the Public Workshop and also on the Project website for 10 days following the event. Participants were encouraged to use the polling questions to express their views on the strengths, weaknesses, and opportunities relating to each Small Area Plan.

This page shows the cumulative results of the Polling Questions for Pinehurst South.

1. What are the strengths of Pinehurst South, as it exists today? Check all that apply. (Multiple choice)

Proximity to Beulah Hill Rd - NC 5	(38/82) 46%
Proximity to Pinehurst Plaza shopping center in Aberdeen	(17/82) 21%
Proximity to Pinehurst Resort and Pinehurst Harness Track	(40/82) 49%
Mix of Commercial and Residential uses	(32/82) 39%
Large, undeveloped parcels	(45/82) 55%
None of the above	(5/82) 6%

2. What are the weaknesses of Pinehurst South, as it exists today? Check all that apply. (Multiple choice)

"Hodgepodge" / "Mishmash" of building types, styles, uses, etc.	(43/82) 52%
Incompatible development which does not reflect the character of the Village	(45/82) 55%
Large, undeveloped parcels	(6/82) 7%
Lack of Open Space and Community Amenities	(28/82) 34%
Lack of Walkability	(55/82) 67%
Lack of access due to the railroad line, to the east of Beulah Hill Rd - NC 5	(28/82) 34%
Traffic on Beulah Hill Rd - NC 5 or elsewhere that affects this area	(70/82) 85%
None of the above	(0/82) 0%

3. What would you like to see (more) of in Pinehurst South? Check all that apply. (Multiple choice)

Retail – Neighborhood Goods and Services (grocery, pharmacy, florist, dry cleaner, nail salon, etc.)	(37/82) 45%
Retail – General Merchandise, Apparel, and Furnishings (clothing, electronics, bookstore, home improvement store, etc.)	(35/82) 43%
Restaurants (any type: sit-down, take-out, coffee shop, etc.)	(47/82) 57%
Office – General Office	(37/82) 45%
Office – Medical	(32/82) 39%
Residential – Apartments (for rent)	(19/82) 23%
Residential – Townhouses / Condo (for sale)	(24/82) 29%
Residential – Single-Family Detached houses (for sale)	(12/82) 15%
None of the above	(8/82) 10%

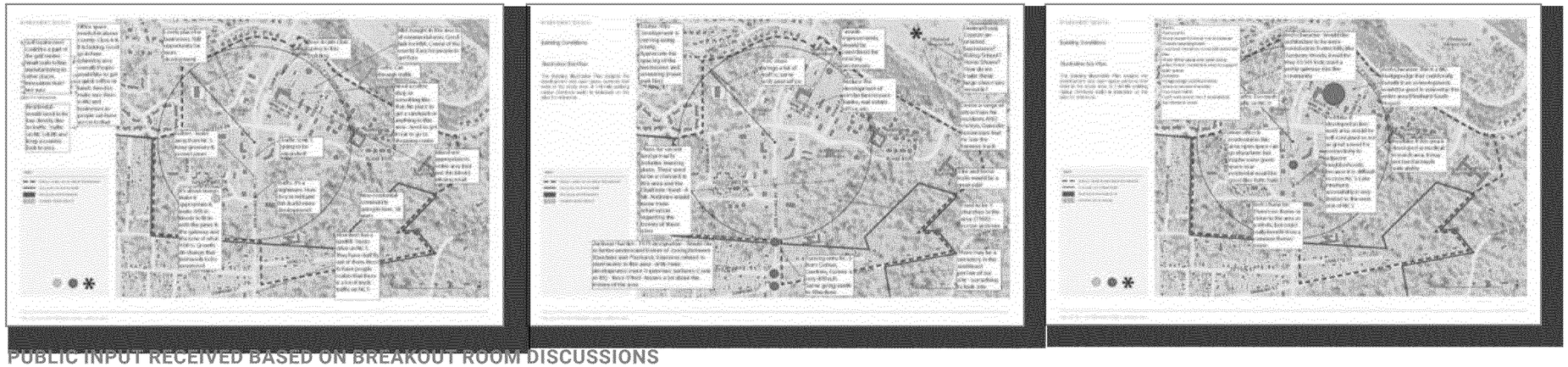
4. What is your favorite or most frequented place to visit within Pinehurst South? Choose one.

US Post Office	(40) 49%
ABC Liquor Store (...it's ok; this survey is anonymous)	(19) 23%
Businesses within the Trotter Hills Office Park	(3) 4%
Quail Haven Retirement Village (pre-COVID)	(0) 0%
Pinehurst Healthcare & Rehabilitation Center (pre-COVID)	(1) 1%
Another business (a professional office, retail, restaurant, etc.)	(10) 12%
A friend's house	(1) 1%
Other	(4) 5%
I do not spend any significant time here	(4) 5%

Pinehurst South Input Summary

PUBLIC WORKSHOP 1

The Public Workshop offered the community an opportunity to voice their observations and concerns about the future of Village Place and Pinehurst South. The list below is a compilation of the comments received during Public Workshop 1, as well as additional comments received by staff post workshop. For a full list of comments recorded during Public Workshop 1, please reference the document's Appendix posted on the website.



PUBLIC INPUT RECEIVED BASED ON BREAKOUT ROOM DISCUSSIONS

The pages above are examples of notes taken in various Breakout Rooms during the Public Workshop. For a full reference of these comments, please see the Appendix.

Land Use

- Development right now is inconsistent
- Strong desire for a public open space in this area
  - Some stakeholders mentioned open space like Tufts Park
  - Build/extend recreational amenities for families in the area
- Low density residential desired by some stakeholders
- Desire for mixed-use:
  - Consider mixed use that disperses traffic, encourages internal circulation
  - This area is currently a bedroom community, needs businesses to help tax base
  - The area between Dawn Rd and Parker Lane is seen as an opportunity for mixed-use, it is missing retail right now. A coffee shop or deli would be great – it is easily accessible
- Office space is needed in Moore County – Class A and B is lacking – which would fit this area. Although some stakeholders noted cautioning too much office space as COVID has altered the need for it and the future of office is undetermined
- Given proximity to Aberdeen, Rt. 1 and the railroad, Light Industrial may be attracted to this area
- Opportunity for retail:
  - Along Gaines street
  - Desire for retail uses along Monticello
  - Some stakeholders would like to see a grocery store in this area, while others are happy to go elsewhere
  - Small scale businesses, golf businesses, golf centers?
- Desire for office space – clinical/research businesses
- The Innovation HUB as planned in the New Core masterplan does not resonate with some stakeholders, they are confused by this concept and think it is too much development

Character

- Pinehurst has numerous neighborhoods that are unique, it is okay to keep them different, but connected to each other
- There is no cohesiveness to character in this area
- Keep country area look
- Trotter Hills coming along nicely, a great opportunity for more development, stakeholders like the park-like setting
- Desire for development like Turnberry Wood
- Landscape:
  - Consider buffers along NC5 – keep greenery and protect the pines, set development back from the road.
- Future development needs to fit in with the pines and the gateway and the tone of VOP – growth and change need to be monitored.
- Consider façade improvements for Existing Businesses near Carter St, future businesses should vary, not be the same types of uses
- Concern about new vinyl sided homes and large homes – not sure they match VOP character
- No chain restaurants, no strip centers
- Reuse existing buildings such as Elmore Furniture

Transportation

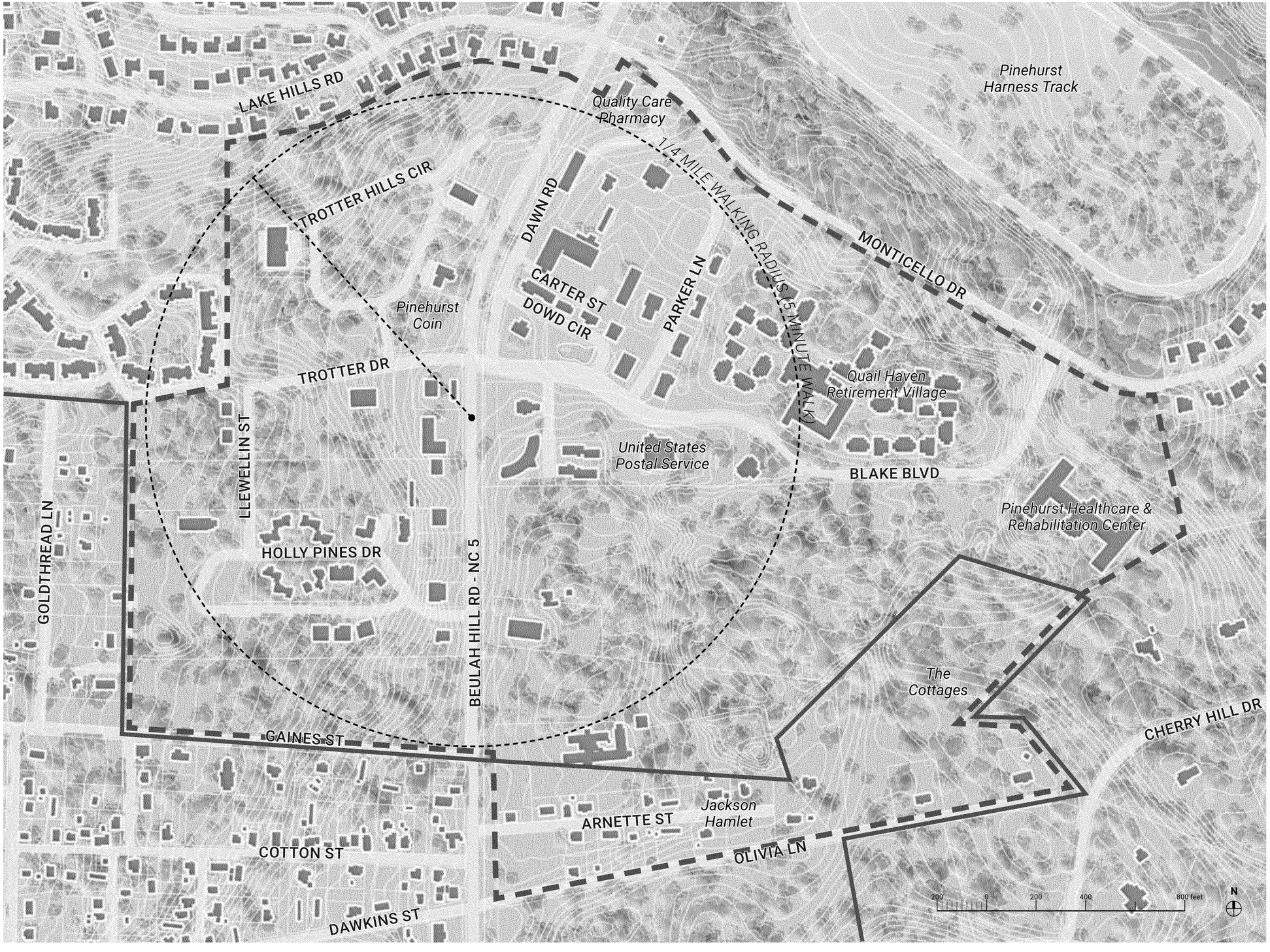
- Need for an independent, professional traffic study
- Pedestrian:
  - Promote pedestrian circulation over vehicular, make more walkable
  - Walking from residences to retail is desired
  - Desire to cross NC5
- Vehicular:
  - Traffic on NC5 is a nightmare, corridor is littered with trash
  - Trucks on NC5 from the Aberdeen landfill are a concern, a lot of truck traffic
  - NC5 intersections of Cotton, Dawkins, Gaines, very difficult turns on both sides
  - Doral Woods exit onto Morganton is very traffic heavy
  - Monticello is used as a cut through
  - The future development off Blake Blvd for 38 homes raises traffic concerns for some stakeholders
  - Residential would need to be low density due to traffic concerns
  - ABC Store and Post Office bring lots of traffic
  - Concern for how to solve traffic, railroad limits widening the roadway.
  - Need for another entrance off Blake Rd past the new liquor store
- Need to connect back to the VC to make this area feel like it is part of VOP, not isolated/disconnected
- Consider bike and horse trails near Pinehurst Rehab Center

Illustrative Site Plan

- Depicts the development and open space patterns
- Indicates 1/4-mile walking radius (5-minute walk)

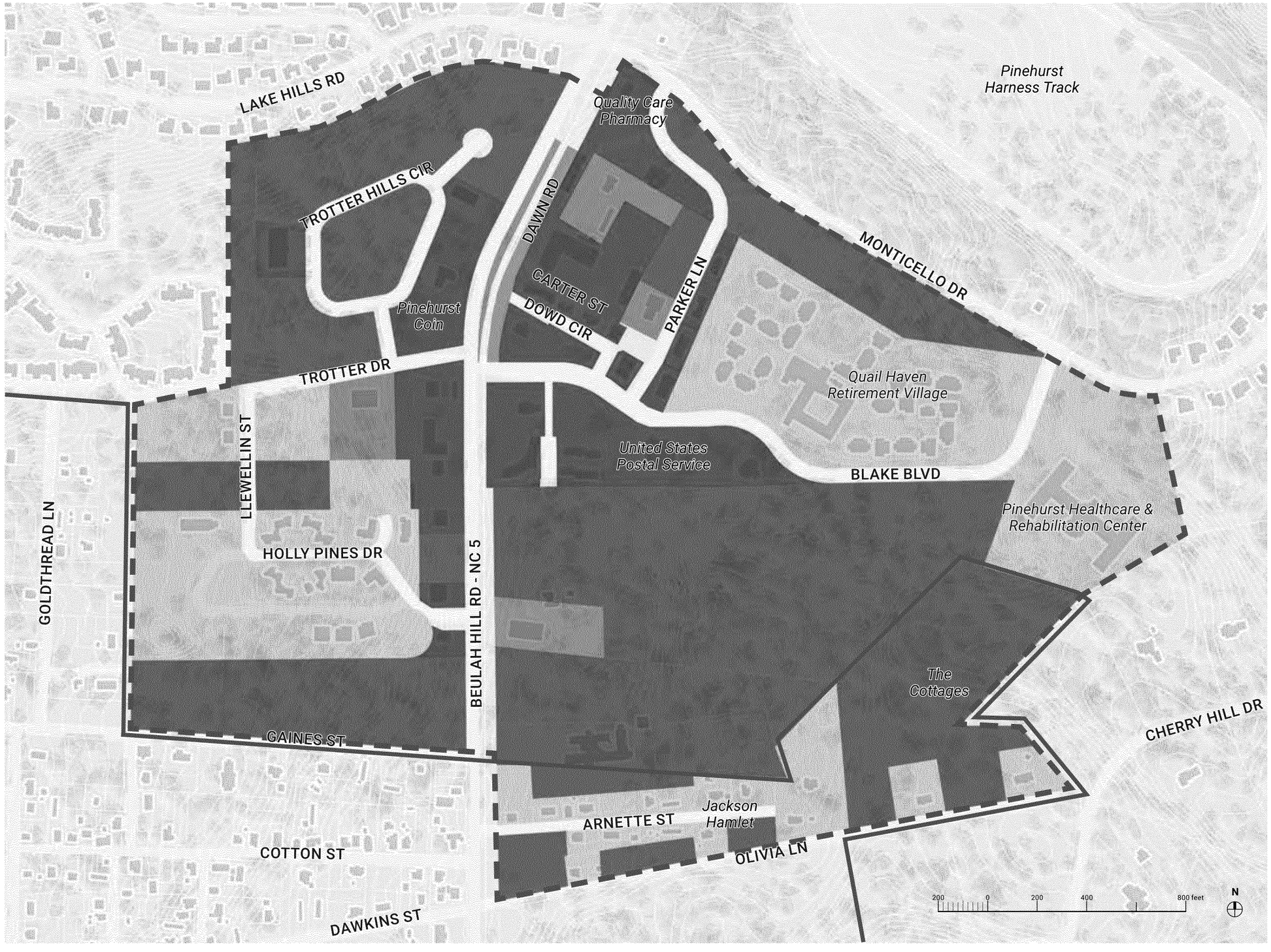
KEY

- SMALL AREA PLAN (SAP) BOUNDARY
- VILLAGE OF PINEHURST
- BUILDING FOOTPRINTS
- PARKS/ OPEN SPACE



Land Use

- Commercial uses exist along Beulah Hill Road - NC 5
- A mix of residential and large vacant properties exist to either side
- A large percentage of the study area is vacant or underutilized



KEY

- SMALL AREA PLAN (SAP) BOUNDARY
- VILLAGE OF PINEHURST
- CIVIC
- RETAIL
- OFFICE
- RESIDENTIAL
- INDUSTRIAL
- VACANT
- PARKS/ OPEN SPACE

Overall, Pinehurst South is best suited for residential and office uses. Hospitality could be an option as well. Large-scale retail would be challenging given the access issues, but locally-serving retail would be viable.

Strengths
- Land availability
- Direct access to Pinehurst Resort via NC 5
- New development in area
- Strong businesses in area (such as Quail Haven Retirement Village)

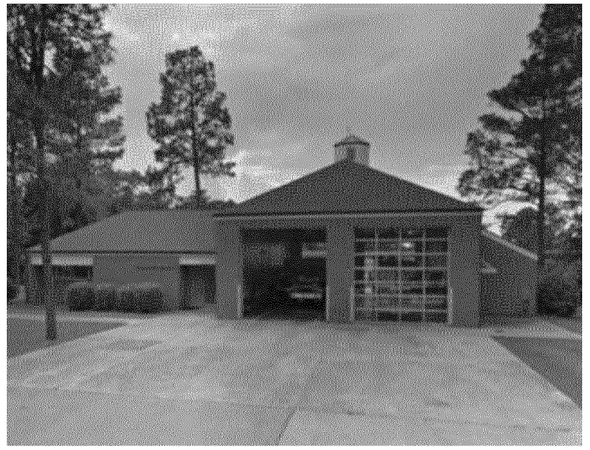
Weaknesses
- No common theme to buildings
- Unrelated land uses
- Traffic issues

Opportunities
- Capitalize on growth along NC 5
- Concentration of public and semi-public services (post office, fire station, VA services)
- Create a distinct identity for area
- Build off of USGA
- Infill development

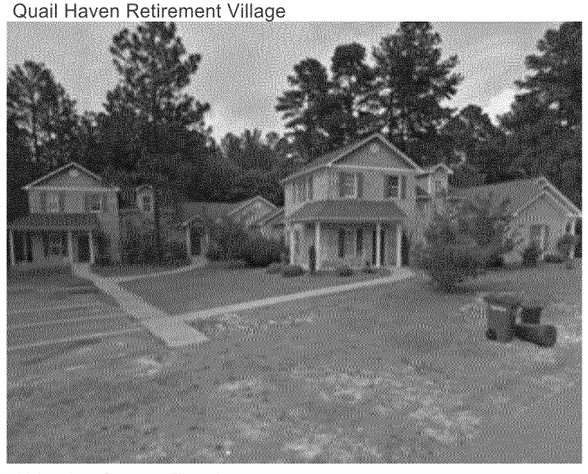
Threats/Challenges
- RR crossings & limited access
- Significant amount of vacant land south of the study area along NC Hwy 5 that could take demand potential away



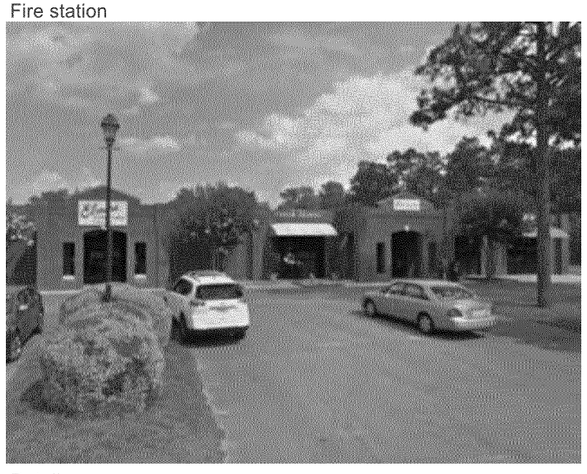
Quail Haven Retirement Village



Fire station



Abingdon Square Townhomes



Retail



Veterans Guardian Claim Consulting



Open space along Blake Blvd.

MARKET ANALYSIS

CONCLUSIONS

Summary of Market Opportunity

Land Use	Overall Market Opportunity	Village Place	Pinehurst South
For-Sale Residential	XXXXX	XXXX	XXXX
For-Rent Residential	XXX	XXX	XXX
Retail	XXXX	XXX	XXX
Office	XX	XX	XX
Hospitality	XXX	XXX	XXX
Golf	XX	O	X

Key: XXXXX = best, X = worst, O = none

Summary of Demand

Land Use	Demand Potential	Locations within Pinehurst
For-Sale Residential	80-120 homes/year	Almost anywhere
For-Rent Residential	15-25 units/year	Major roads, VP, PS, Village Cntr
Retail	20-25,000 SF/ every 5 years	Major roads, VP, PS, Village Cntr
Office	Up to 5,000 SF/year	Medical area, VP, PS, Village Cntr
Hospitality	25 rooms/yr. in Moore Co.	Resort, Village Cntr, PS, VP
Golf	2-3 courses over the next 10 years in Moore Co.	Focus Area 1 is the only area with space

Summary of Demand for Land Uses within Planning Areas

Land Use	Village Place	Pinehurst South
For-Sale Residential	Unlimited at build-out 1 project would sell approximately 15-25 homes per year	Unlimited at build-out 1 project would sell approximately 15-25 homes per year
For-Rent Residential	At build-out, 1 to 2 projects of 70-100 units each Timing depends on where else apartments have been constructed (e.g. Village only has demand for 1 project every 5-10 years)	At build-out, 1-2 projects of up to 200 units each, depending on location Timing depends on where else apartments have been constructed
Retail	25,000-50,000 SF at build-out	Up to 80,000 SF with grocery, 40,000 SF without grocery at build-out
Office	25,000 – 30,000 SF at build-out Limited amount per year. 5,000 SF total in Village. Village Place could capture some of that, but likely less than Pinehurst South	Up to 100,000 SF at build-out Limited amount per year. 5,000 SF total in Village. Pinehurst South could capture some of that. Could increase, depending on impact of USGA
Hospitality	At build-out, 1 hotel with 75-100 rooms as well as bed and breakfasts	At build-out, 1 hotel with approximately 100 rooms
Golf	None	Possibly some support functions (although the land probably has a higher and better use than maintenance for golf)

HEALTH/WELLNESS/FITNESS PRINCIPLES







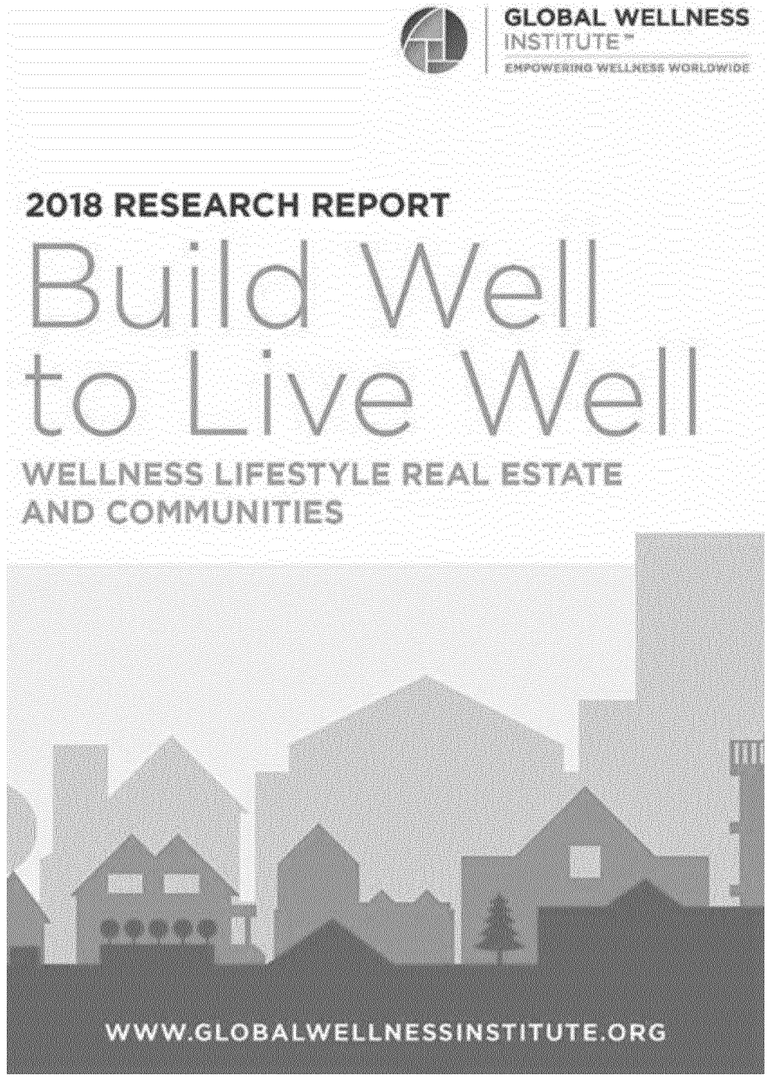


- Connect people with health, fitness, and wellness through daily engagement and activity
- Create places to Live-Work-Play-Eat-Shop-Learn in an enriched natural setting that promotes healthy lifestyles
- Promote walkable, mixed-use neighborhoods

Celebrate Pinehurst's founding as a health resort village



HEALTH/WELLNESS/FITNESS PRINCIPLES





Potential homebuyers, tenants, and developers increasingly invest in neighborhoods dedicated to holistic health and wellness. According to a new report by the Global Wellness Institute titled Build Well to Live Well: Wellness Lifestyle Real Estate and Communities, in North America alone, the market is worth $52.5 billion and is growing by 6.4% annually. This growing industry is worth $134 billion worldwide and is expected to grow to $180 billion in 2022.

A recent World Health Organization study that found that 80% to 90% of our health outcomes are intimately tied to where and how we live. The Gallup Active Living Study found that residents of places that score highest for an "active living environment" experience significantly lower rates of issues such as smoking, obesity, diabetes, high blood pressure, high cholesterol, and depression.

Prospective homeowners are willing to pay an average of a 10% to 25% premium for residential units within wellness communities. There are, as of 2018, roughly 350 wellness community projects in the pipeline in North America alone.

Wellness communities share the same general commitments—to health, to nature, to environmental sustainability—but each boasts a unique character to appeal to different markets.

APPROACH

Character:

- Gateway at NC5 & Blake Blvd. important
- Architecture does not need to emulate the Village Center (VC), but should reflect the overall character of VOP
- New streets should reflect the curvilinear character of Olmsted plan where practical, in response to topography, etc.
- 1-2 stories
- Jackson Hamlet: respect this historically Black neighborhood and its residents' history
- Chalfonte Hotel and Ambassador 's Club – lost history; explore ways of tying in

Land Use:

- Explore placemaking/center east of NC5, between Monticello and Blake Blvd, nexus of Post Office, Pharmacy, ABC, Dowd Cabin, and new Girls & Boys Club
- Explore variety of residential types (including cottages, townhouses, live-work, and missing middle res.) and infill commercial
- Departure from 2019 LRCP (Innovation District better suited to Focus area 3: Medical District; needs anchor institution: medical, university, etc.); could be anchored by Golf
- Incorporate new Open Spaces

Transportation:

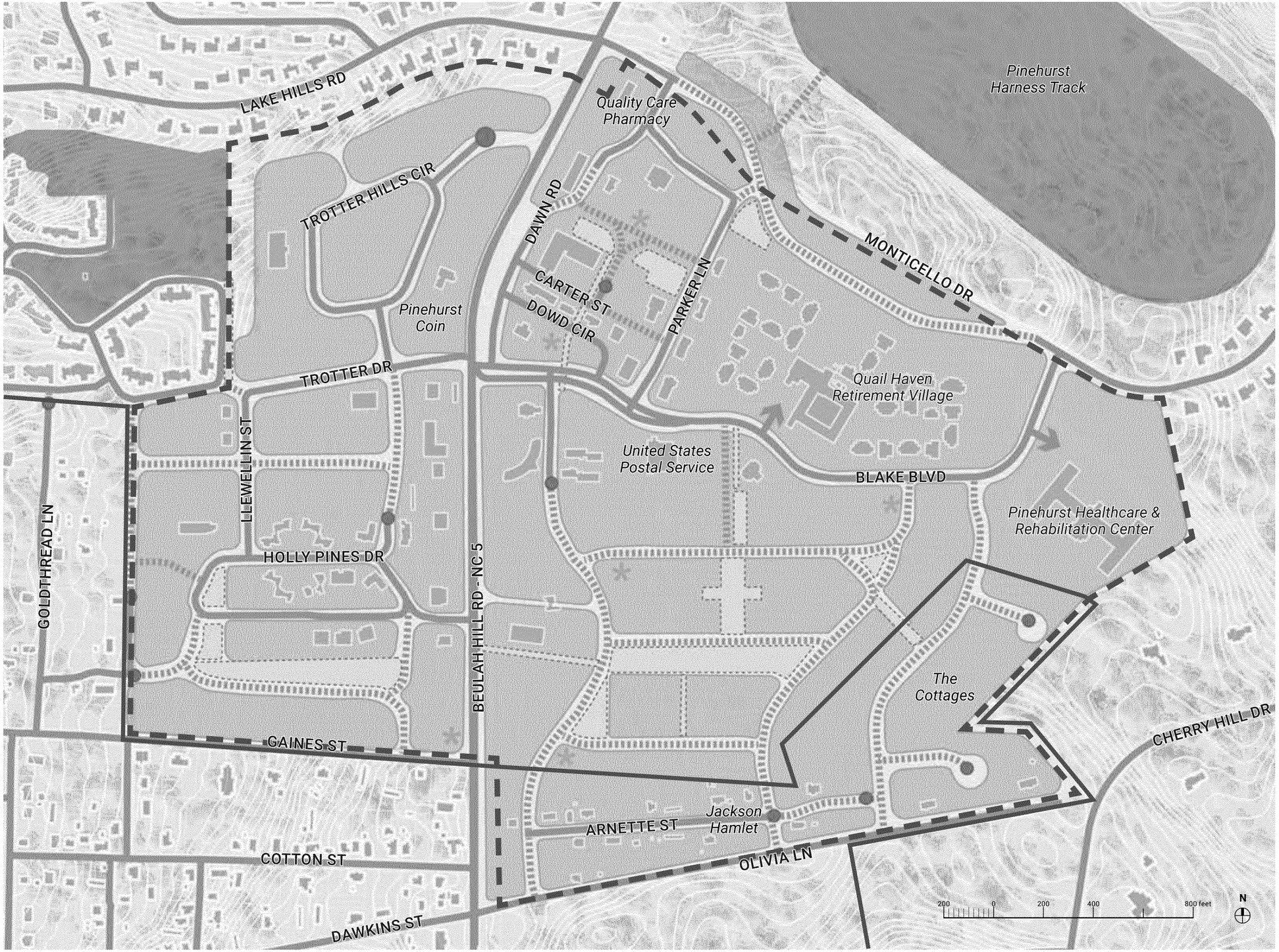
- Help alleviate traffic congestion on NC 5 by providing network/ expanding connectivity
- Explore "Rail along Trail" Shared-Use Path (SUP) east of NC5, between roadway and rail (no golf carts)
- Coordinate with NCDOT Sidewalk and roadway improvements along west side on NC 5
- Study golf cart connections (west to east) and NC 5 and railway crossings (2 existing)

Parti/Block Diagram

- The Parti diagram illustrates the Approach in plan form
- The diagram shows the proposed addition of new streets, forming new blocks and creating a more connected street network
- Potential new infill building locations are shown in black and echo the adjacent existing development

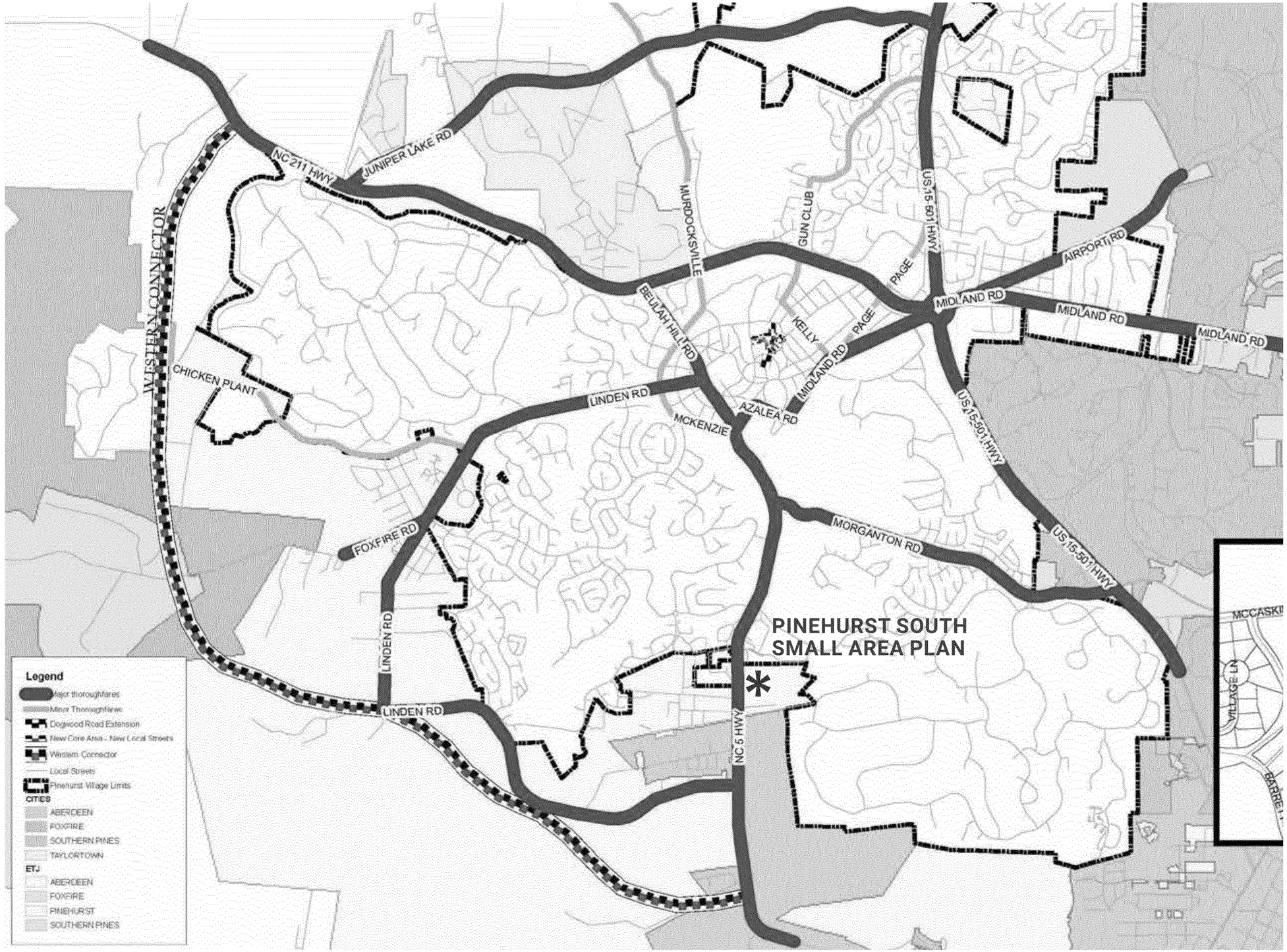
KEY

- SMALL AREA PLAN (SAP) BOUNDARY
- VILLAGE OF PINEHURST
- EXISTING ROADS
- PROPOSED ROADS
- EXISTING DEAD END
- EXISTING PARKS/ OPEN SPACE
- PROPOSED PARKS/ OPEN SPACE
- PROPOSED BLOCKS
- PROPOSED PROMINENT BUILDING LOCATION



2011 Pinehurst Thoroughfare Plan

- The Thoroughfare Plan illustrates the lack of both Major and Minor Thoroughfares through Pinehurst South
- Without alternatives and a connected network of local streets, NC 5 and Morganton Road are overburdened with traffic

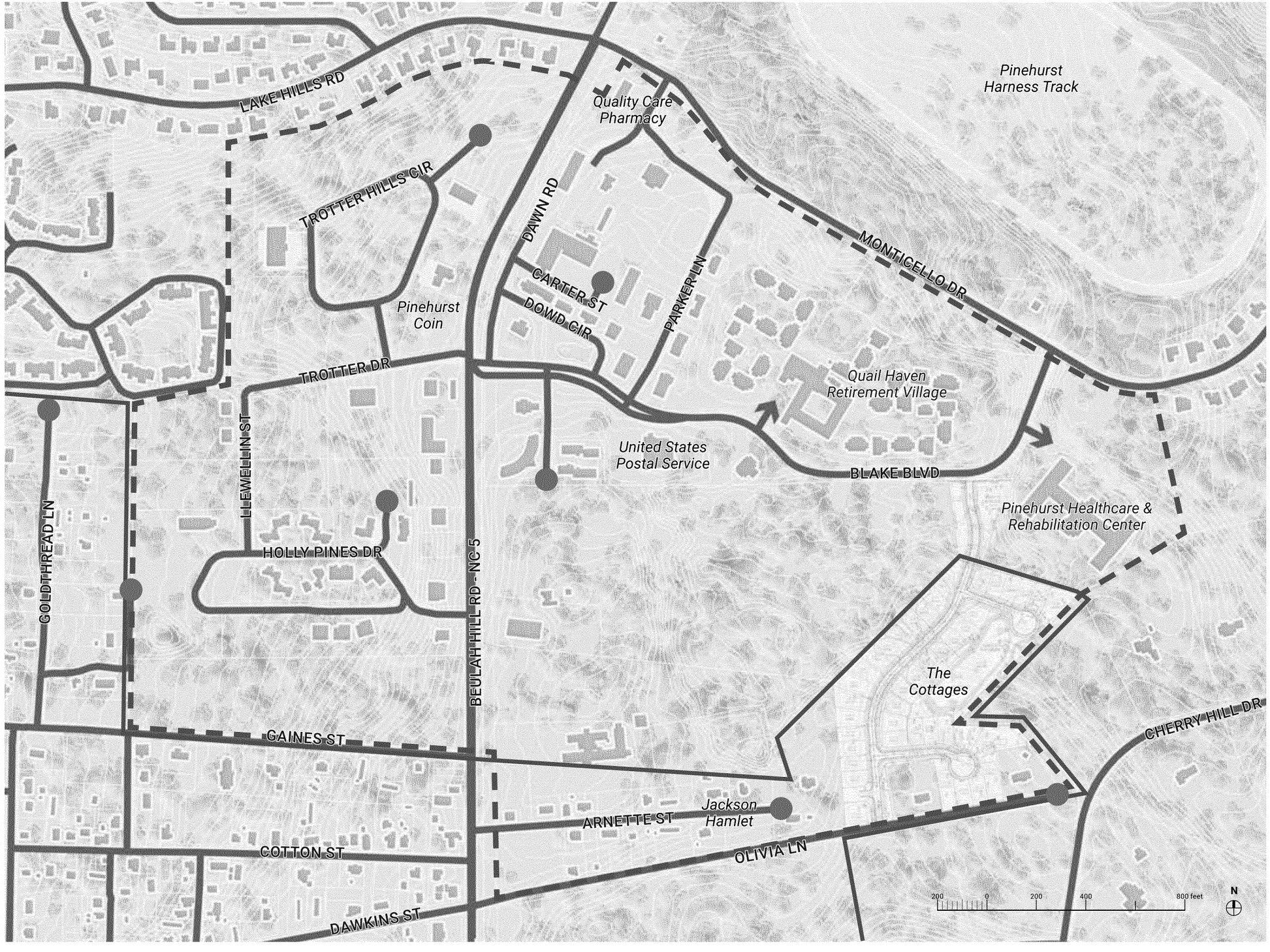


Existing Street Network

- The Pinehurst South study area spans Beulah Hill Road - NC 5, a Major Thoroughfare, that provides direct access to the Village Center to the north and US 501 to the south.
- Neighborhood streets are organic and disconnected with dead-end conditions throughout the study area.

KEY

- SMALL AREA PLAN (SAP) BOUNDARY
- VILLAGE OF PINEHURST
- EXISTING ROADS
- EXISTING DEAD END

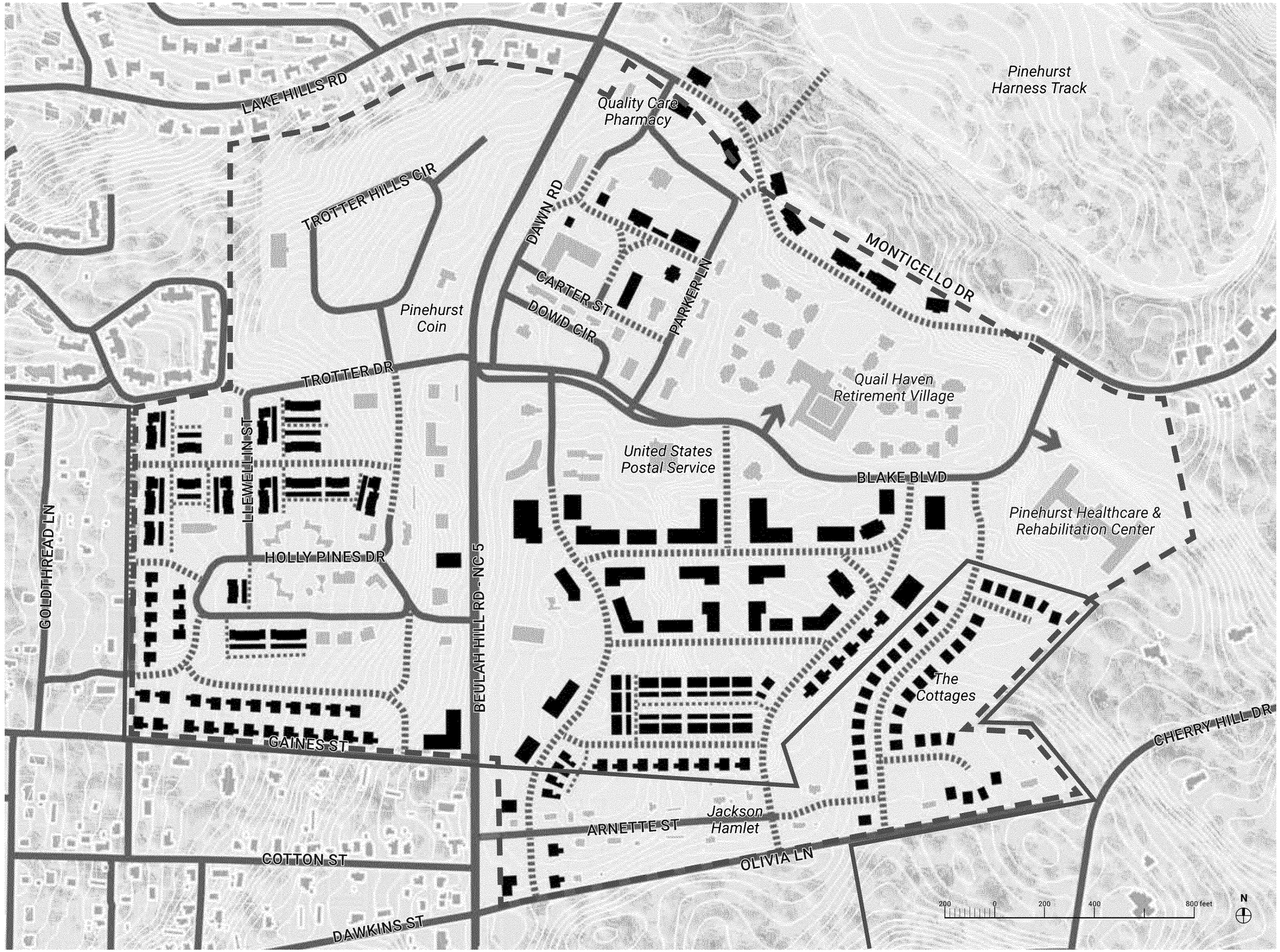


Proposed Street Network

- Increases the local street connections, to reduce reliance on NC 5
- Coordinates with NCDOT planned improvements
- Advocates for the improvement of Olivia as a full, signalized NC 5 intersection, connected to Arnette St. (closed to NC 5)
- Improves pedestrian, bicycle, and golf cart crossings of NC 5 with crosswalks added at signalized intersections

KEY

- SMALL AREA PLAN (SAP) BOUNDARY
- VILLAGE OF PINEHURST
- EXISTING ROADS
- PROPOSED ROADS
- PROPOSED ROAD CLOSURE



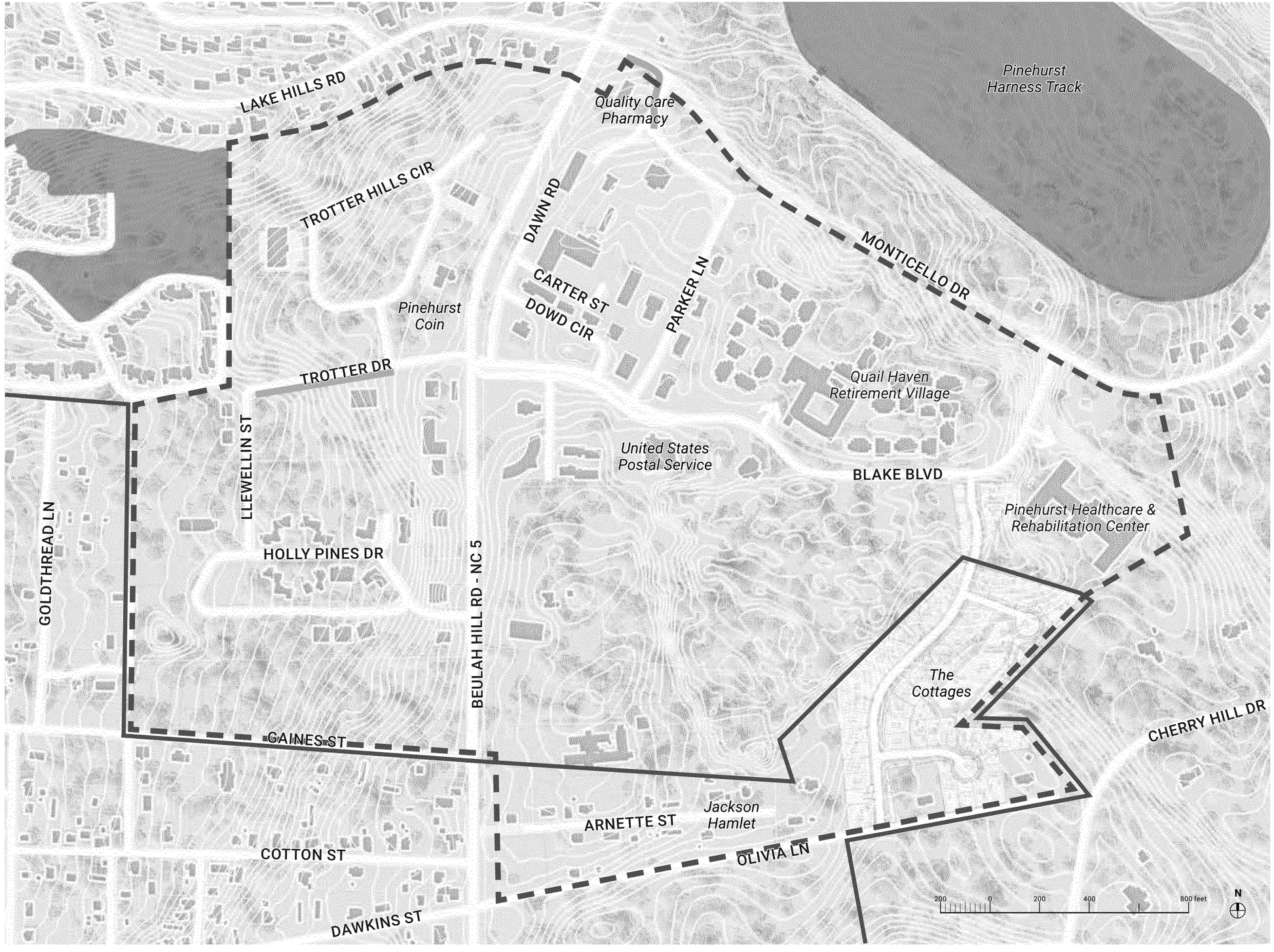
This plan is illustrative only and subject to change. Source: Design Collective, Inc.

Existing Open Space + Pedestrian Network

- No dedicated public open space exists in the study area
- The Pinehurst Harness Track is located just north of the study area boundary
- Small park west of Trotter Hills
- Only two segments of sidewalks exist within the plan area

KEY

- SMALL AREA PLAN (SAP) BOUNDARY
- VILLAGE OF PINEHURST
- GREENWAY TRAILS
- WALKWAY TRAILS
- SIDEWALKS
- PARKS/ OPEN SPACE

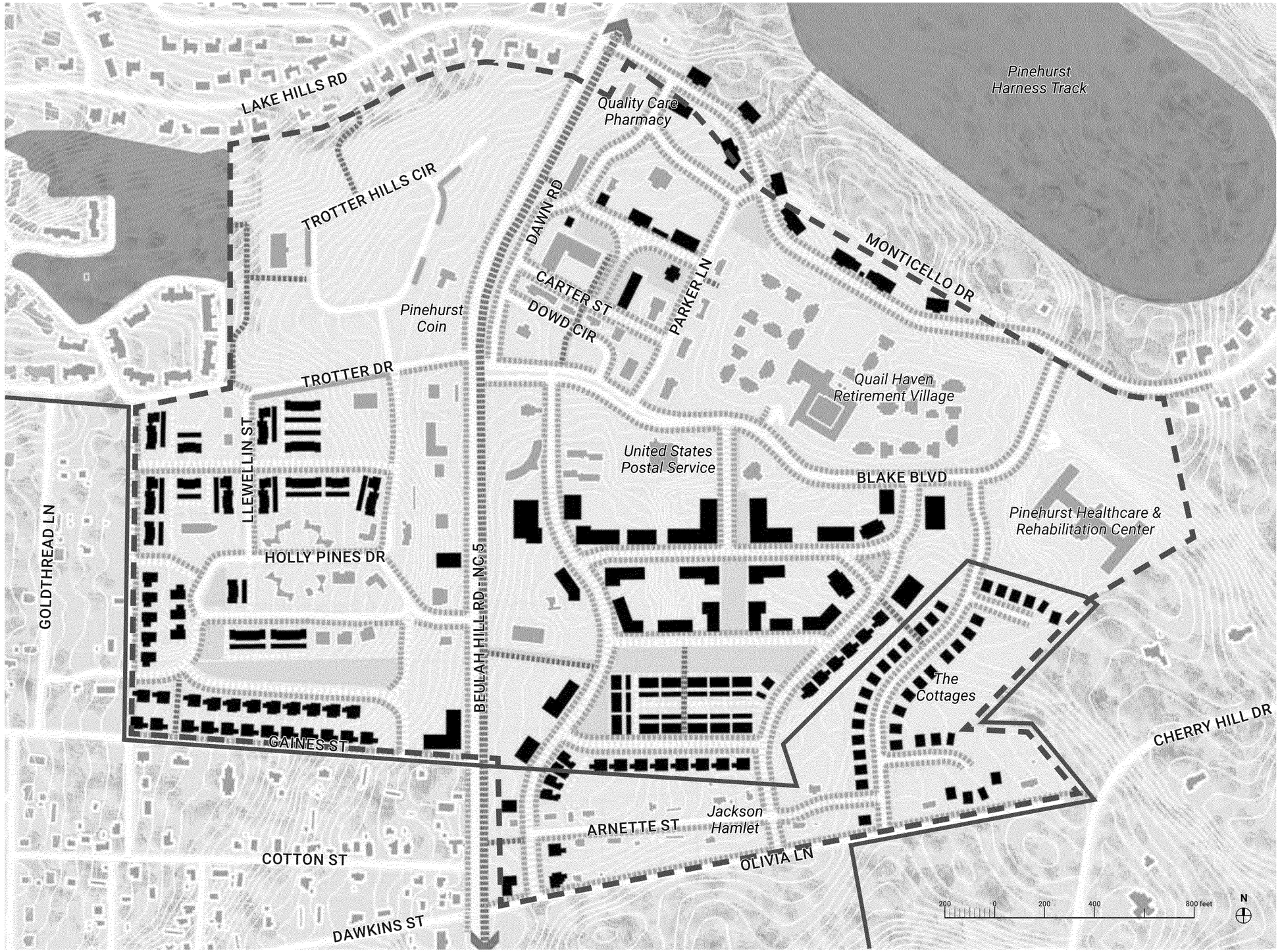


Proposed Open Space + Pedestrian Network

- Shows the addition of a Shared-Use Path (SUP) and sidewalk along NC 5
- Incorporates variety of open space types
- Advocates for a new Central Green and Market Plaza in the core area between Monticello Dr. and Blake Blvd.
- Additional small and large greens throughout

KEY

- SMALL AREA PLAN (SAP) BOUNDARY
- VILLAGE OF PINEHURST
- EXISTING GREENWAY TRAILS
- EXISTING WALKWAY TRAILS
- PROPOSED WALKWAY TRAILS
- EXISTING SIDEWALKS
- PROPOSED BRICK SIDEWALKS
- EXISTING PARKS/ OPEN SPACE
- PROPOSED PARKS/ OPEN SPACE
- PROPOSED SHARED-USE PATH



This plan is illustrative only and subject to change. Source: Design Collective, Inc.

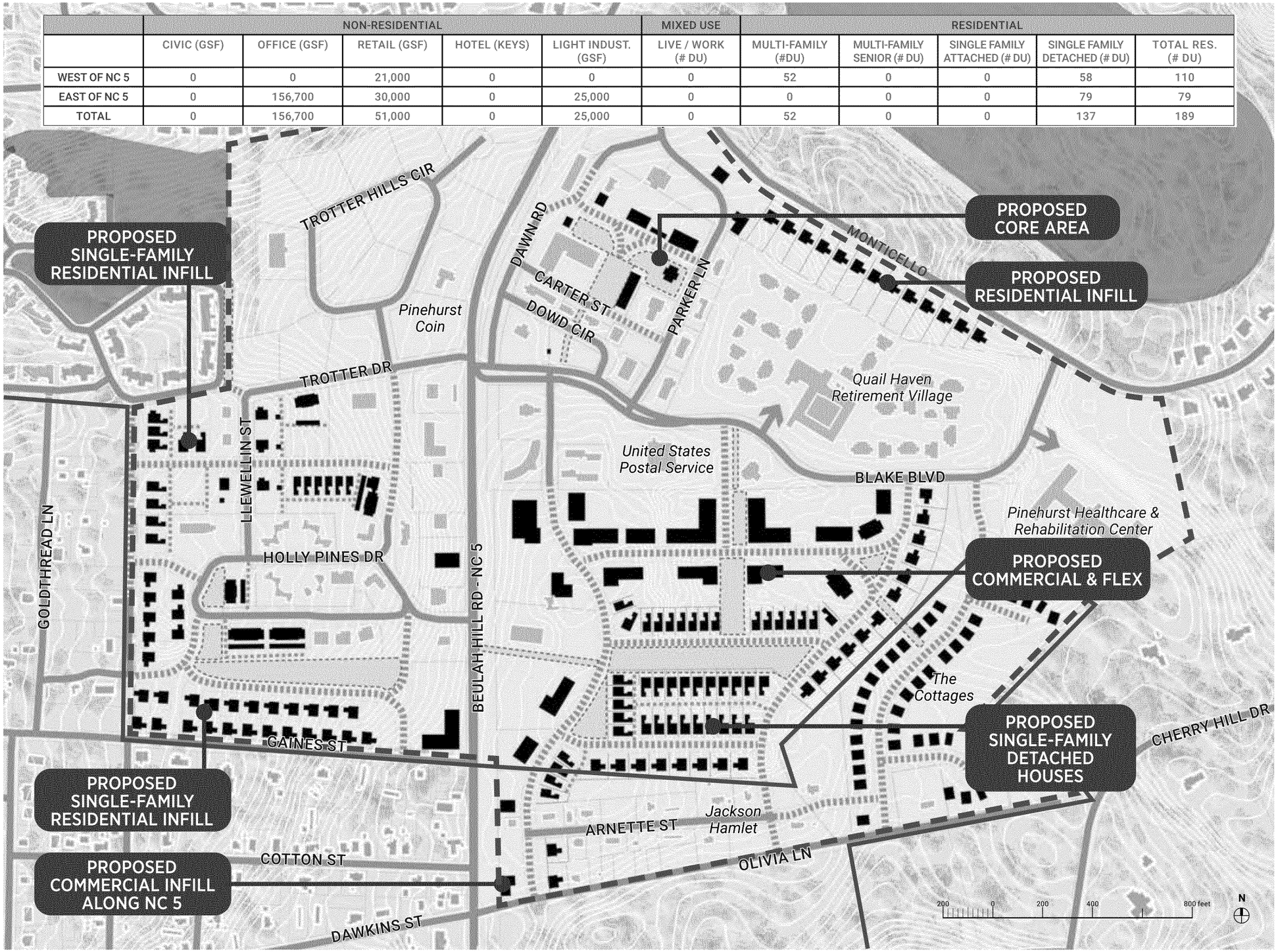
Proposed Low Intensity Plan

- The Low Intensity Plan illustrates the potential build-out of Pinehurst South over 30+ years
- Small scale commercial and residential infill vacant or underutilized parcels
- Monticello Dr. remains in its current alignment
- Includes a higher percentage of Single-Family Detached than the High Intensity option

KEY

- SMALL AREA PLAN (SAP) BOUNDARY
- VILLAGE OF PINEHURST
- EXISTING ROADS
- PROPOSED ROADS
- PROPOSED ALLEYS
- EXISTING PARKS/OPEN SPACE
- PROPOSED PARKS/OPEN SPACE

	NON-RESIDENTIAL					MIXED USE	RESIDENTIAL				
	CIVIC (GSF)	OFFICE (GSF)	RETAIL (GSF)	HOTEL (KEYS)	LIGHT INDUST. (GSF)	LIVE / WORK (# DU)	MULTI-FAMILY (#DU)	MULTI-FAMILY SENIOR (# DU)	SINGLE FAMILY ATTACHED (# DU)	SINGLE FAMILY DETACHED (# DU)	TOTAL RES. (# DU)
WEST OF NC 5	0	0	21,000	0	0	0	52	0	0	58	110
EAST OF NC 5	0	156,700	30,000	0	25,000	0	0	0	0	79	79
TOTAL	0	156,700	51,000	0	25,000	0	52	0	0	137	189



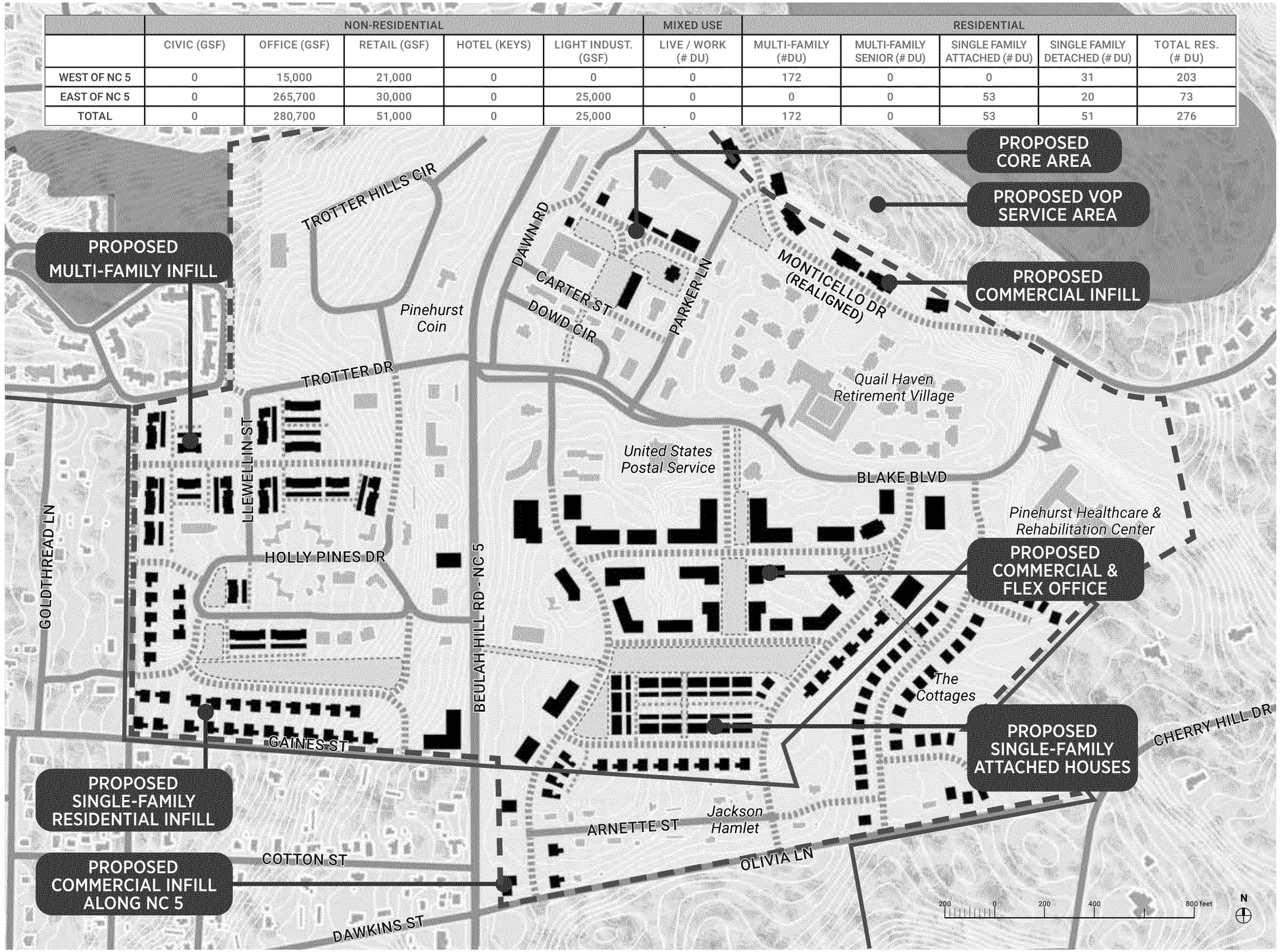
Proposed High Intensity Plan

- The High Intensity Plan illustrates the potential build-out of Pinehurst South over 50+ years
- As with the Low Intensity Plan, small scale commercial and residential infill vacant or underutilized parcels
- This option differs with the realignment of Monticello Dr. to allow for a new location for the VOP Service Area (currently in the VP core)

KEY

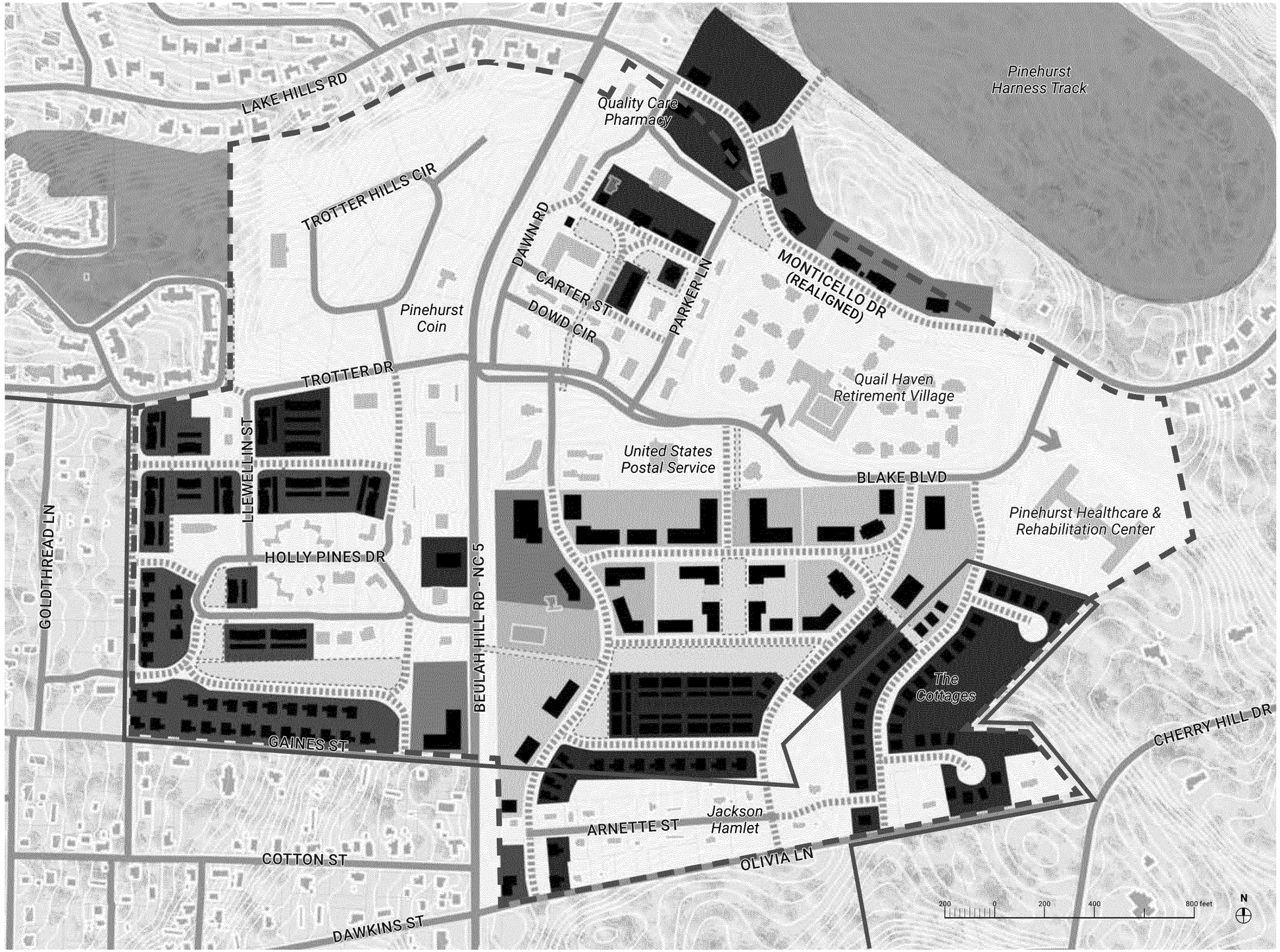
- SMALL AREA PLAN (SAP) BOUNDARY
- VILLAGE OF PINEHURST
- EXISTING ROADS
- PROPOSED ROADS
- PROPOSED ALLEYS
- EXISTING PARKS/OPEN SPACE
- PROPOSED PARKS/OPEN SPACE

	NON-RESIDENTIAL					MIXED USE	RESIDENTIAL				
	CIVIC (GSF)	OFFICE (GSF)	RETAIL (GSF)	HOTEL (KEYS)	LIGHT INDUST. (GSF)	LIVE / WORK (# DU)	MULTI-FAMILY (#DU)	MULTI-FAMILY SENIOR (# DU)	SINGLE FAMILY ATTACHED (# DU)	SINGLE FAMILY DETACHED (# DU)	TOTAL RES. (# DU)
WEST OF NC 5	0	15,000	21,000	0	0	0	172	0	0	31	203
EAST OF NC 5	0	265,700	30,000	0	25,000	0	0	0	53	20	73
TOTAL	0	280,700	51,000	0	25,000	0	172	0	53	51	276



Proposed Absorption Plan

- This plan diagram shows the likely absorption time frames for the High Intensity Plan option, based on the SAP Market Analysis



KEY

- SMALL AREA PLAN (SAP) BOUNDARY
- VILLAGE OF PINEHURST
- EXISTING ROADS
- PROPOSED ROADS
- PROPOSED ALLEYS
- 0-5 YEARS
- 5-10 YEARS
- 10-20 YEARS
- 20-30 YEARS
- 30-40 YEARS
- 40-50 YEARS
- 50 + YEARS

Residential A1



Single Family Attached House

Residential A2



Single Family Attached House

Residential A3



Single Family Detached House

Residential A4



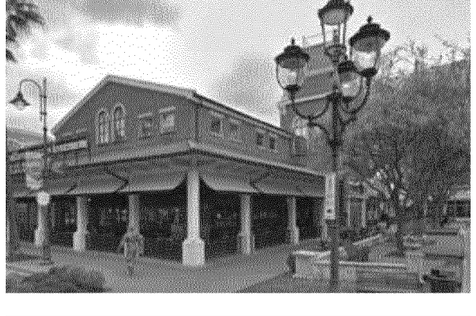
Single Family Detached House

Residential A5



Single Family Detached House

Commercial: Retail B1



Commercial: Office B2



Commercial B3



Market/Business Incubator

Commercial: Retail B4



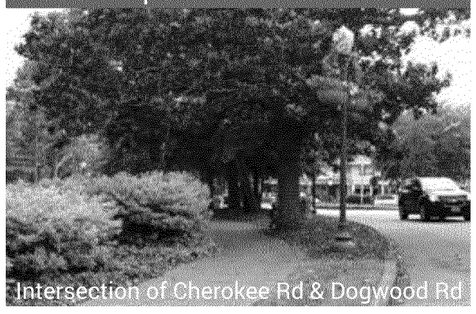
Coffee Shop

Commercial: Grocer B5



The Fresh Market

Streetscape C1



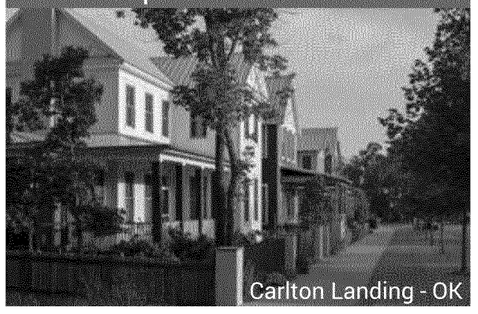
Intersection of Cherokee Rd & Dogwood Rd

Streetscape C2



Kentlands - MD

Streetscape C3

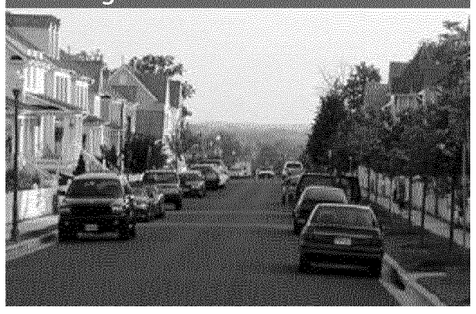


Carlton Landing - OK

Parking: Parallel C4



Parking: Parallel C5



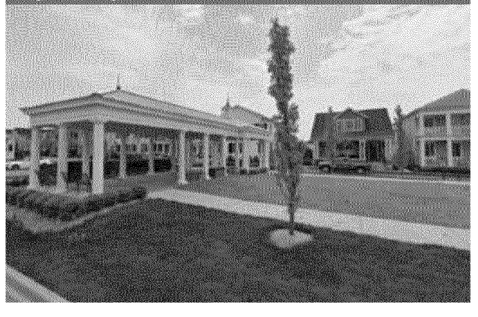
Open Space: Playground D1



Open Space D2



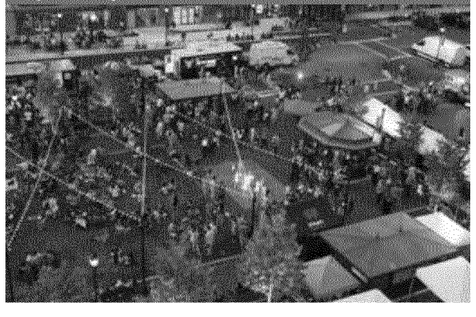
Open Space: Green D3



Open Space: Market D4

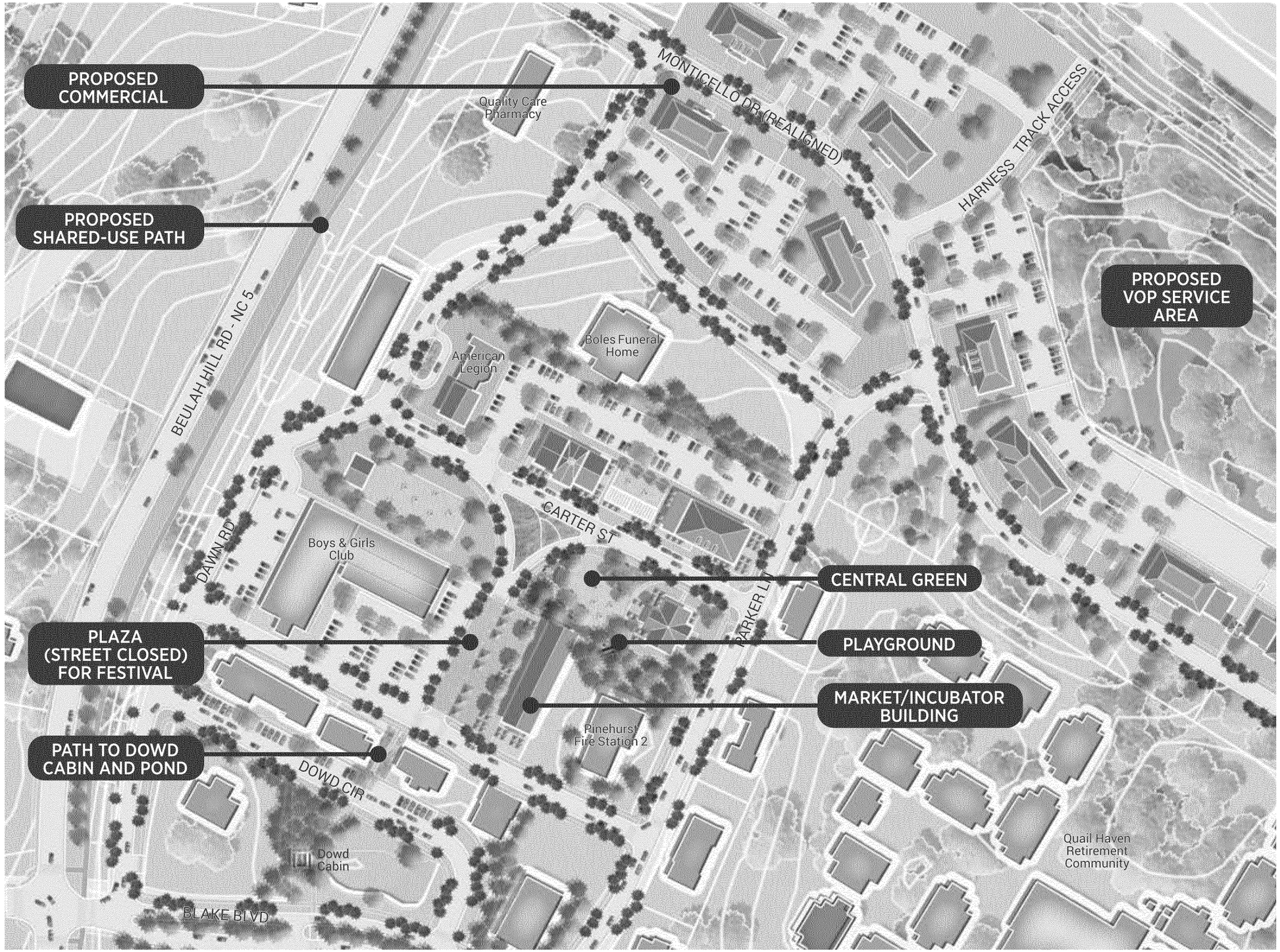


Open Space: Plaza D5



Detail Plan

- The Detail Plan illustrates the potential build-out of the core area south of Monticello Dr. and north of Blake Blvd.
- Builds off the existing Post Office, Pharmacy, ABC, and Dowd Cabin as well as the planned Girls & Boys Club and HBAC
- New open spaces include a Market Plaza, Central Green, playground, and path south to Dowd Cabin



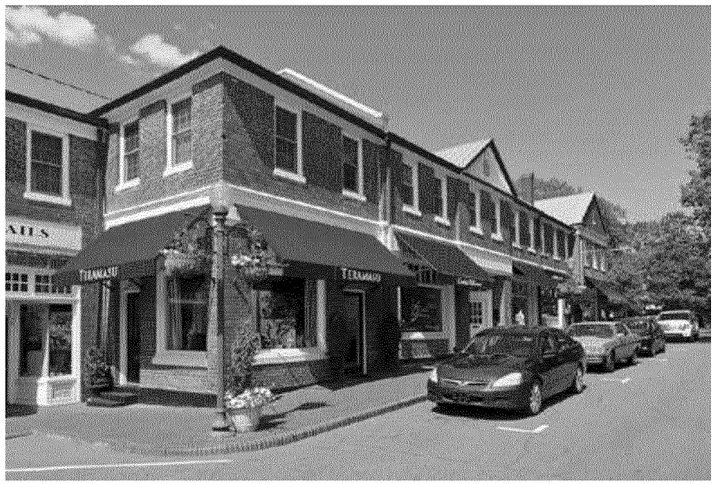
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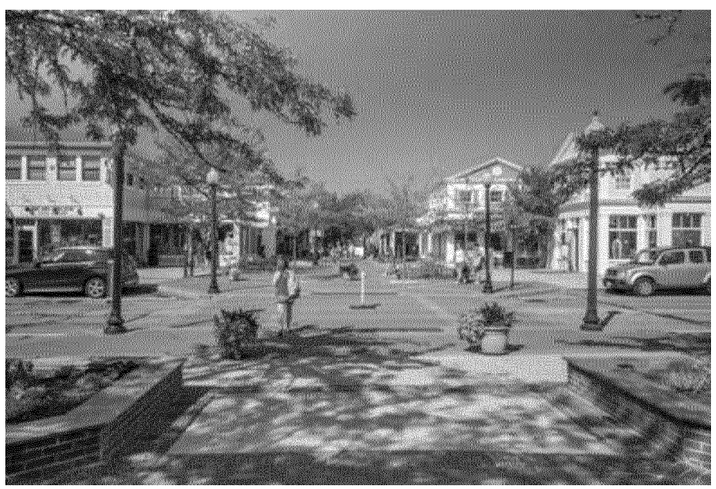
- Typical Commercial Street Section

- The Typical Commercial Street Section is a two-way, two-lane street with parallel parking, street trees and groundcover in SWM planters or tree pits, a 5’ min. clear pedestrian zone, and a storefront zone for tables, chairs, potted plants, and displays.
- To reflect the character of the Village Center, within the Village Place area, brick sidewalks are recommended, along with the Village’s standard benches and street lights
- Within Pinehurst South, brick sidewalks are preferred (not required), uniform street lights and furnishings shall be installed but may be of a compatible, contemporary design of durable materials (to be selected)

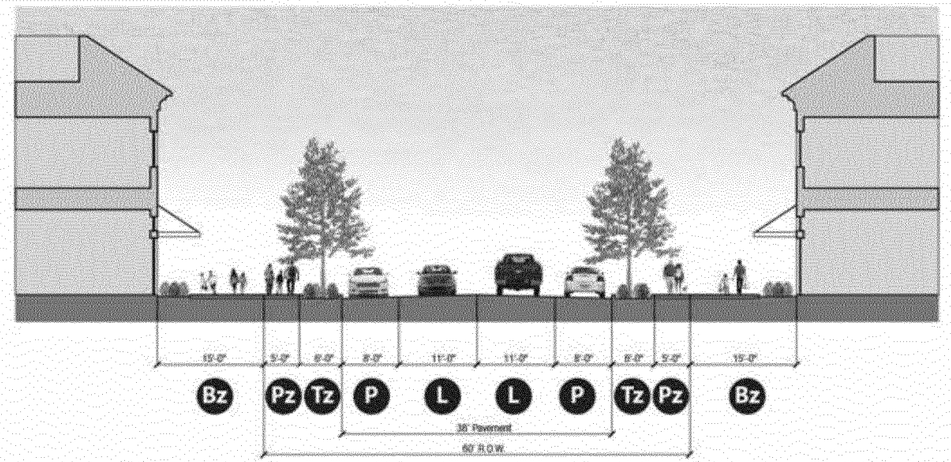
STREET SECTION KEY

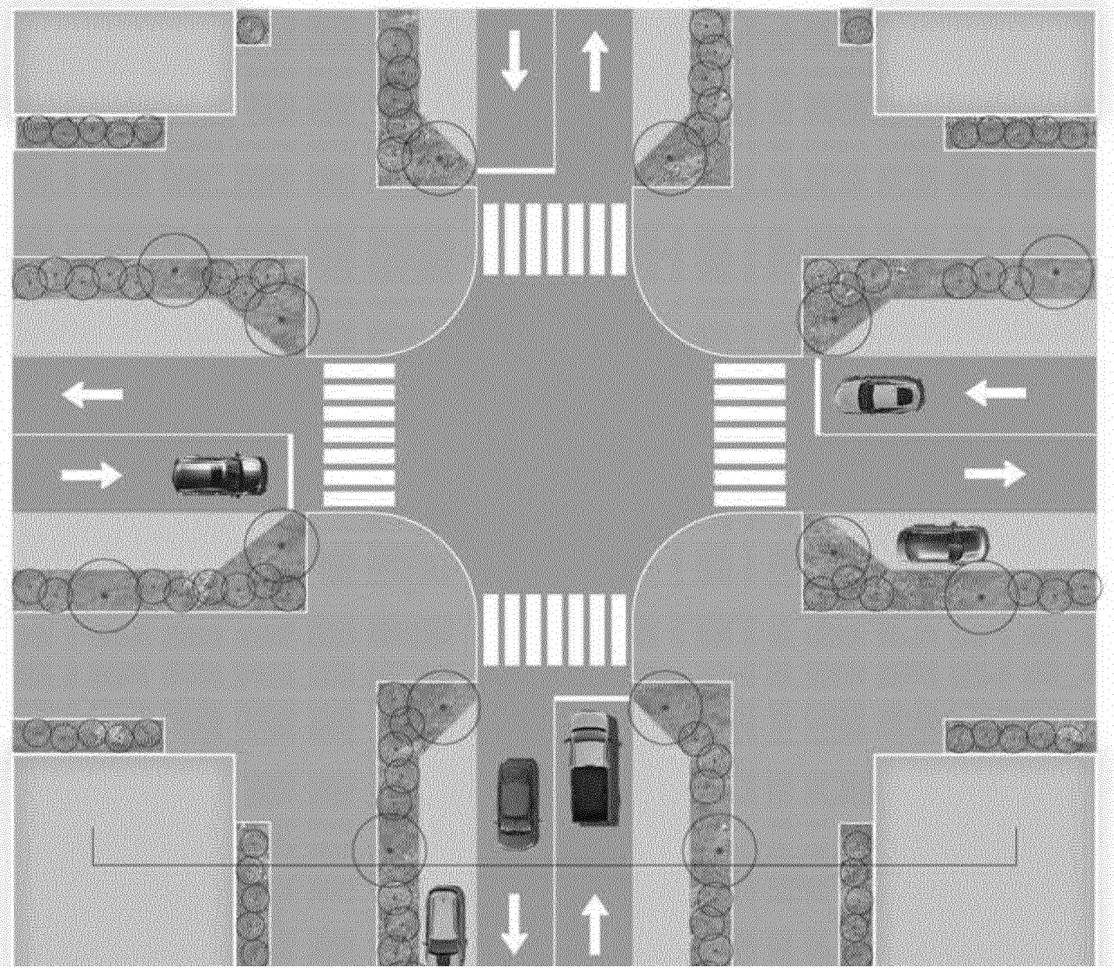
- BZ BUILDING ZONE
- S SHOULDER
- PZ PEDESTRIAN ZONE (SIDEWALK)
- TZ TREE ZONE (PLANTING STRIP)
- P PARKING (PARALLEL)
- L TRAVEL LANES (VEHICULAR)
- D DRIVEWAY





Typical Commercial





- Typical Residential Street Section

- The Typical Residential Street Section is a two-way, two-lane street with parallel parking, street trees and groundcover in SWM planters or tree lawns, a 5′ min. clear pedestrian zone.
- To reflect the character of the Village Center, within the Village Place area, brick sidewalks are recommended, along with the Village's standard street lights
- Within Pinehurst South, brick sidewalks are preferred (not required), uniform street lights and furnishings shall be installed but may be of a compatible, contemporary design of durable materials (to be selected)

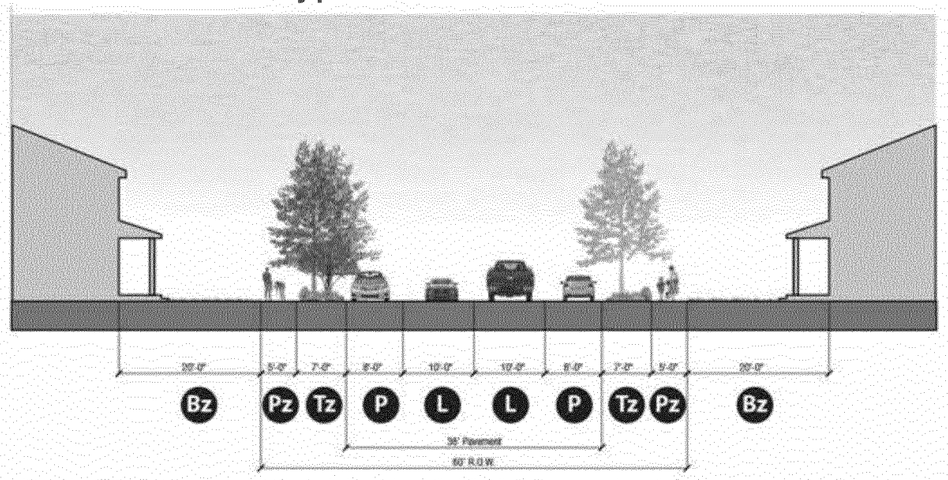
STREET SECTION KEY

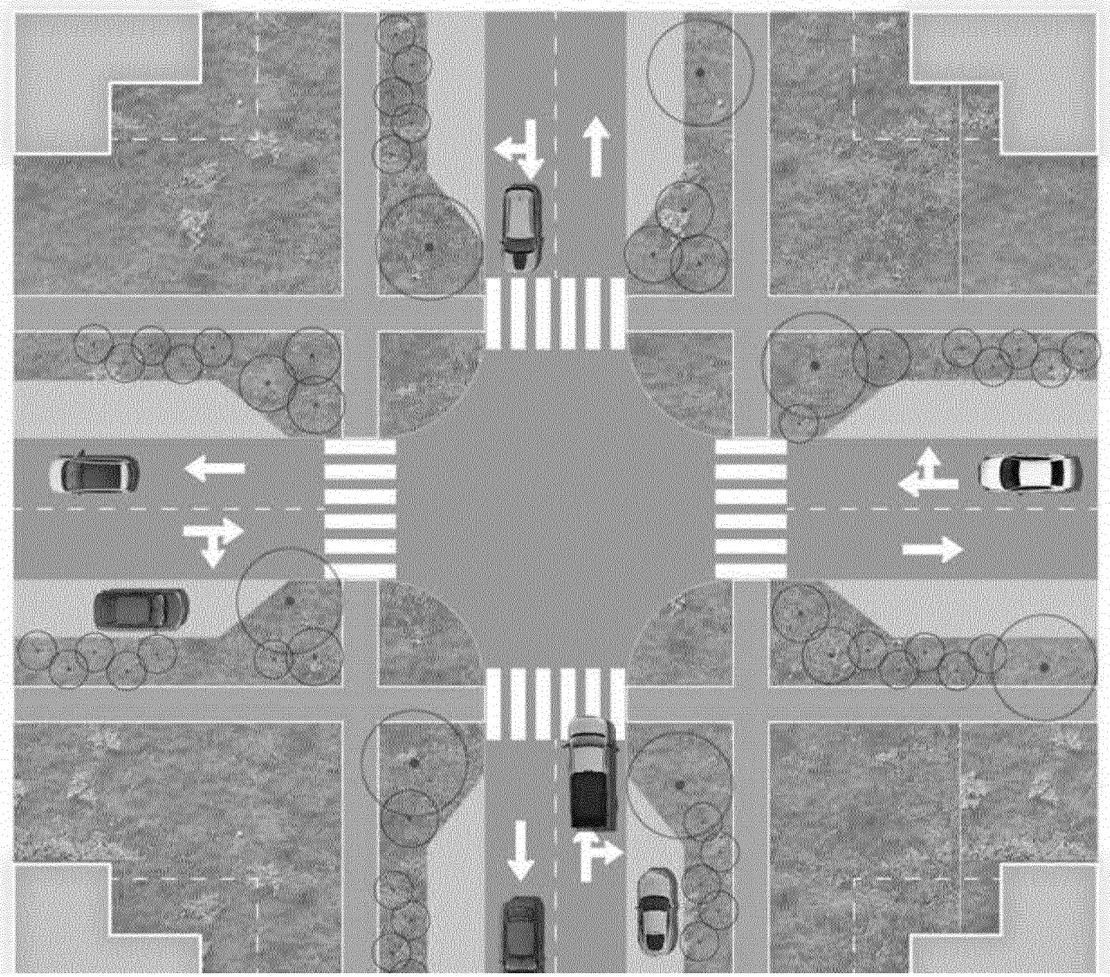
- BZ — BUILDING ZONE
- S — SHOULDER
- PZ — PEDESTRIAN ZONE (SIDEWALK)
- TZ — TREE ZONE (PLANTING STRIP)
- P — PARKING (PARALLEL)
- L — TRAVEL LANES (VEHICULAR)
- D — DRIVEWAY





Typical Residential





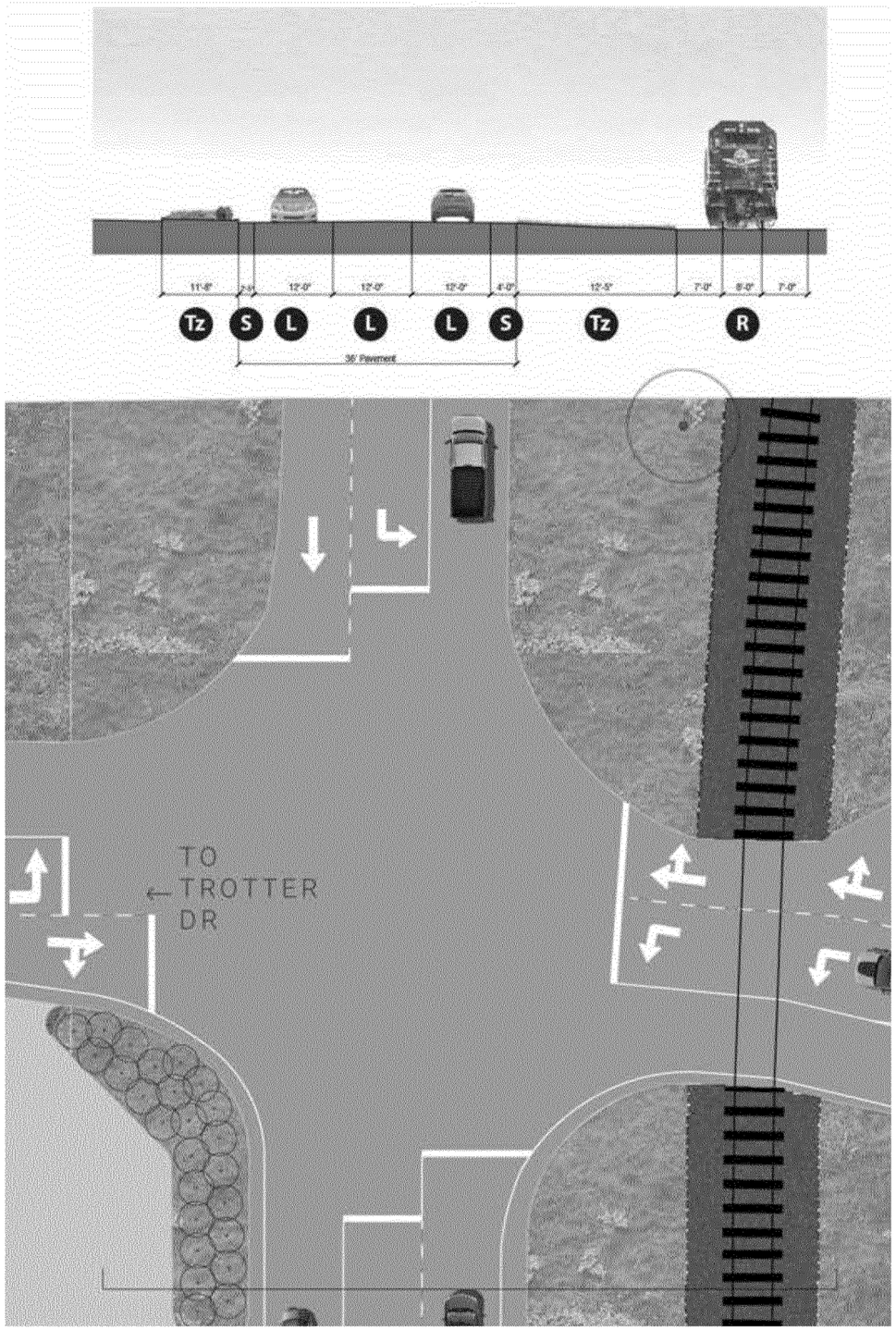
- NC 5 / Blake Blvd. Street Section

- Coordinates with NCDOT planned improvements to add a sidewalk to the west side of NC 5
- Proposes a Shared-Use Path (SUP) between the highway and rail line, under the Rails-to-Trail program; where the trail is close to the rail a physical barrier will be required

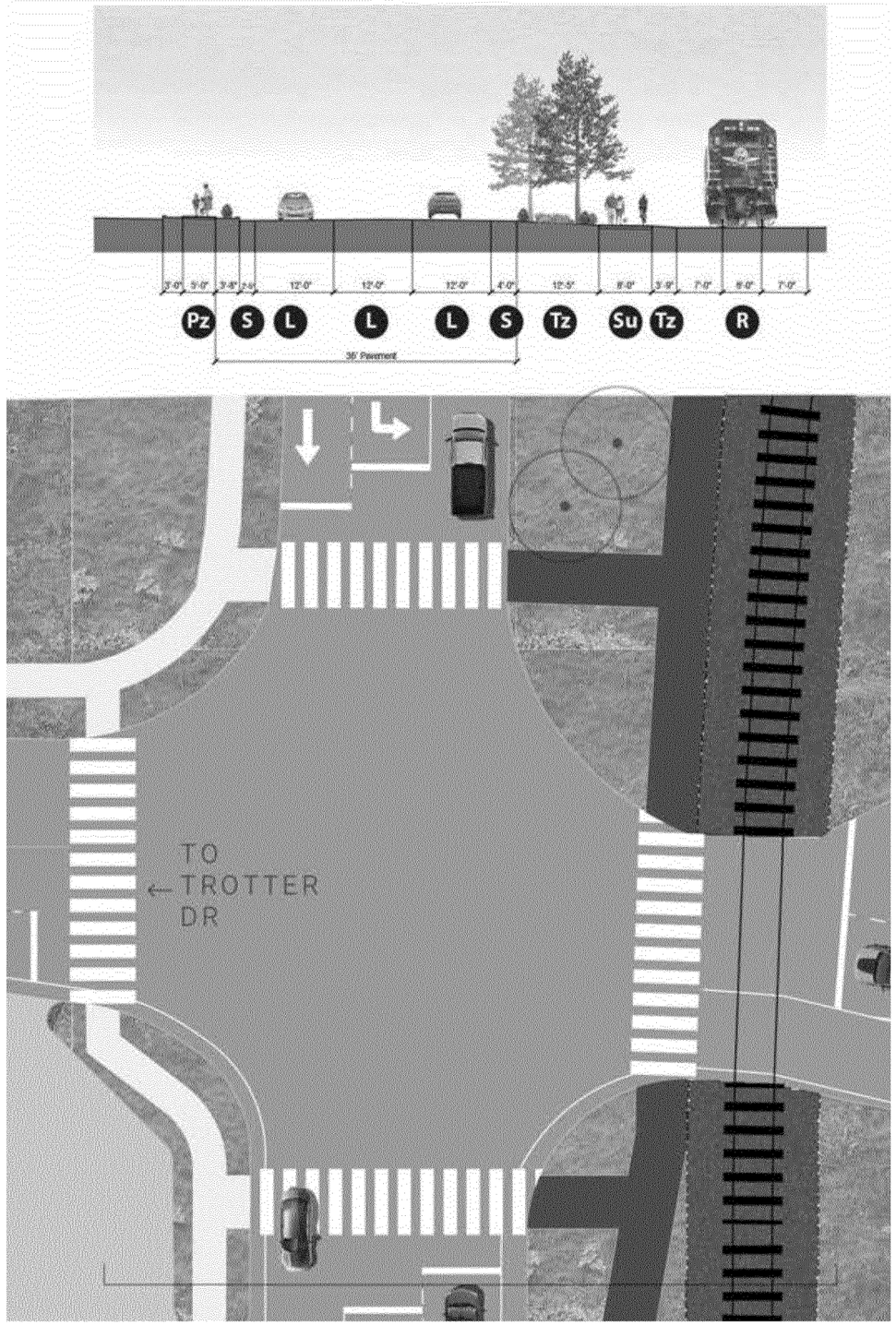
STREET SECTION KEY

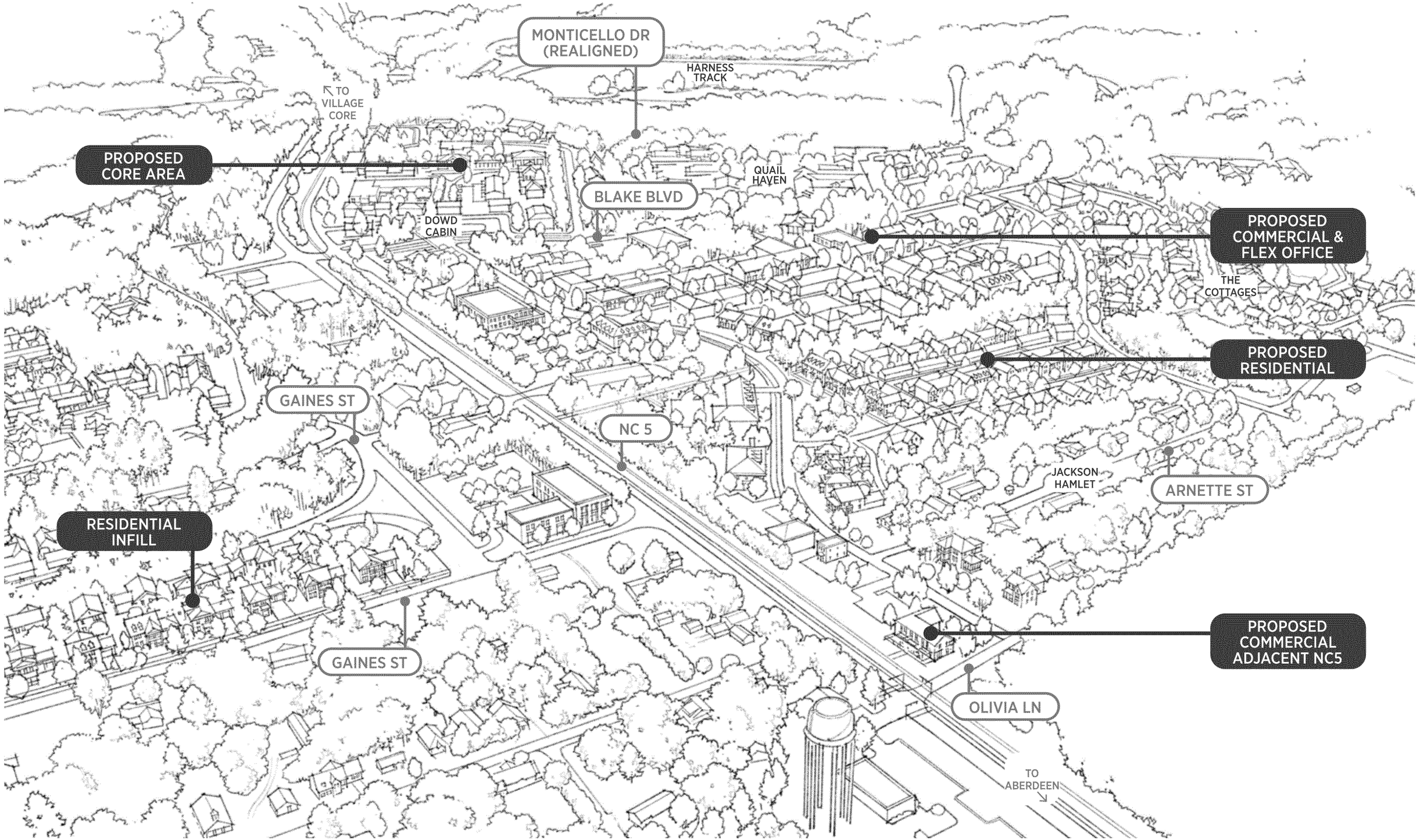
- BZ BUILDING ZONE
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- TZ TREE ZONE (PLANTING STRIP)
- P PARKING (PARALLEL)
- L TRAVEL LANES (VEHICULAR)
- D DRIVEWAY

Existing



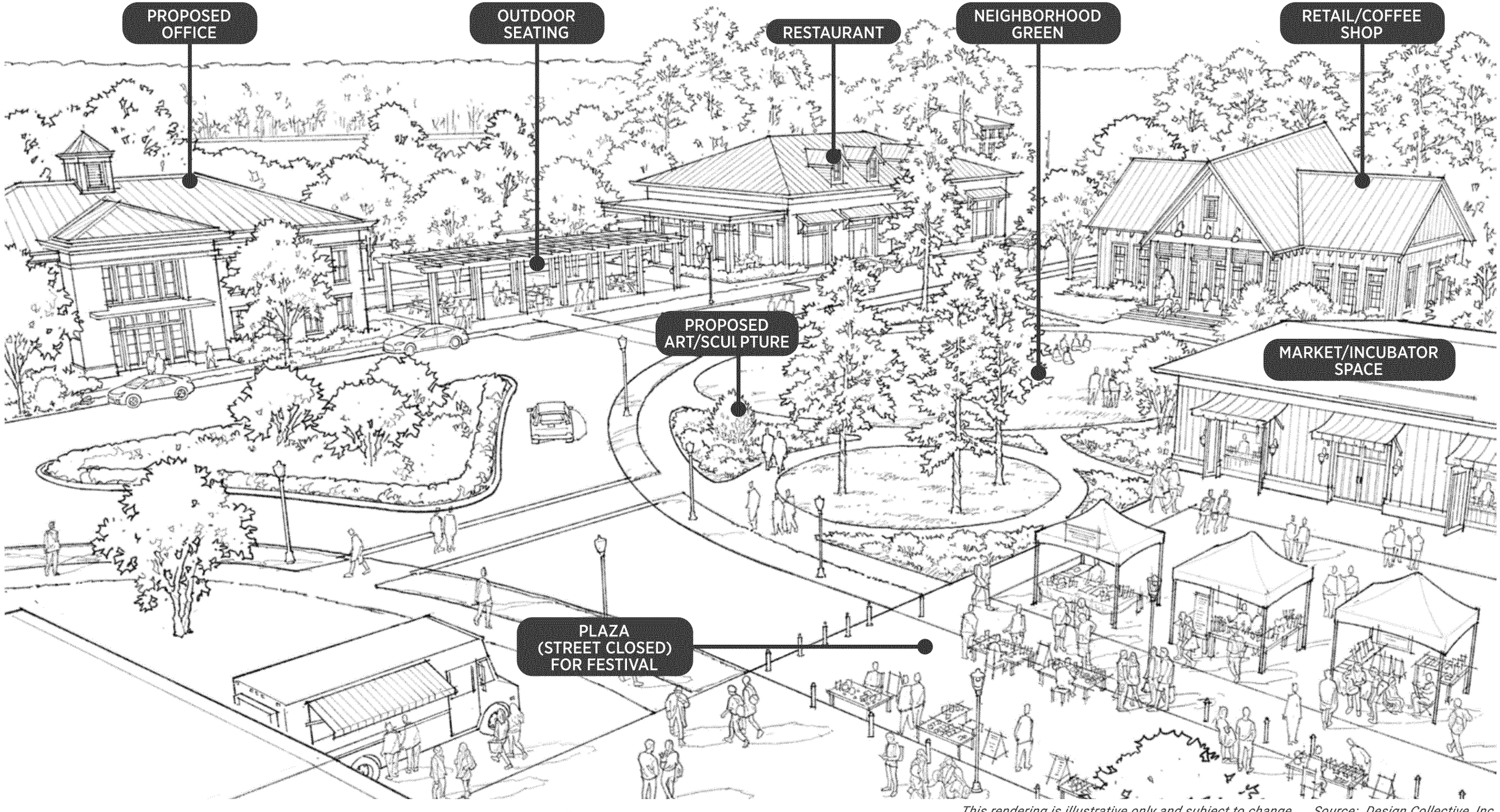
Proposed





PINEHURST SOUTH - AERIAL RENDERING

This rendering is illustrative only and subject to change. *Source: Design Collective, Inc. & Zanetta Illustration*



PINEHURST SOUTH - BIRD'S EYE RENDERING

This rendering is illustrative only and subject to change. *Source: Design Collective, Inc. & Zanetta Illustration*

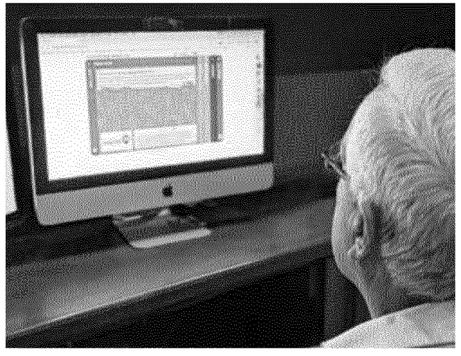
BREAK-OUT ROOM DISCUSSIONS

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- 8-10 people per break-out room
- Facilitator in each break-out room
- Plan options, street sections, and precedent images in each break-out room
- 30 to 40-minute discussion
- Goal: Tell us your thoughts on the proposed plan options, street sections, and precedent images; listen to other stakeholders' input; and determine consensus.

NEXT STEPS



NEXT STEPS

Following the Workshop:

- Materials will be posted to the Engage Pinehurst Project Website:

HTTPS://ENGAGE.VOPNC.ORG/SMALLAREAPLANS

- A brief survey will be available for those who were not able to attend the Workshop or who would like to give additional input
- Workshop 3: Preview of Final Reports and FBCs