



Background Document and Survey Neighborhood Center Sizing Golden Gate Area Master Plan

This background paper provides information on potential commercial locations within rural Golden Gate Estates. During the public outreach “Workshops” for the restudy of the Golden Gate Area Master Plan (GGAMP), citizens identified a constraint on existing neighborhood centers. Several factors were identified. Some factors, such as required buffers, septic and well facilities, are somewhat unique to the Estates. Others, such as setbacks, parking, future rights-of-way and water management are more universal.

At its meeting on September 11, 2018, the Board of County Commissioners (BCC) directed staff to review this issue prior to its Transmittal Hearing on the GGAMP proposed amendments. In doing so, it is necessary to bring perspective, data and analysis to the public for consideration.

In reviewing the types and building area of various neighborhood center types, note that the GGAMP provides an opportunity for rezoning to these building areas, but does not mandate approval in any specific instance. That is left to a separate public hearing process and will consider all site specific issues.

The market analysis of these locations (below) identifies a need for Neighborhood Commercial square footage equivalent to 116,000 square feet (an average for the Naples area) by around 2030. Given the timeframes for planning, due diligence, entitlement, permitting and construction, it is not unreasonable to identify these needs at this time in the GGAMP. Likewise, it is not essential to do so, as the private sector has been active and able in petitioning for such changes as a matter of course.

The following pages contain background for further consideration of this issue as it relates to the GGAMP:

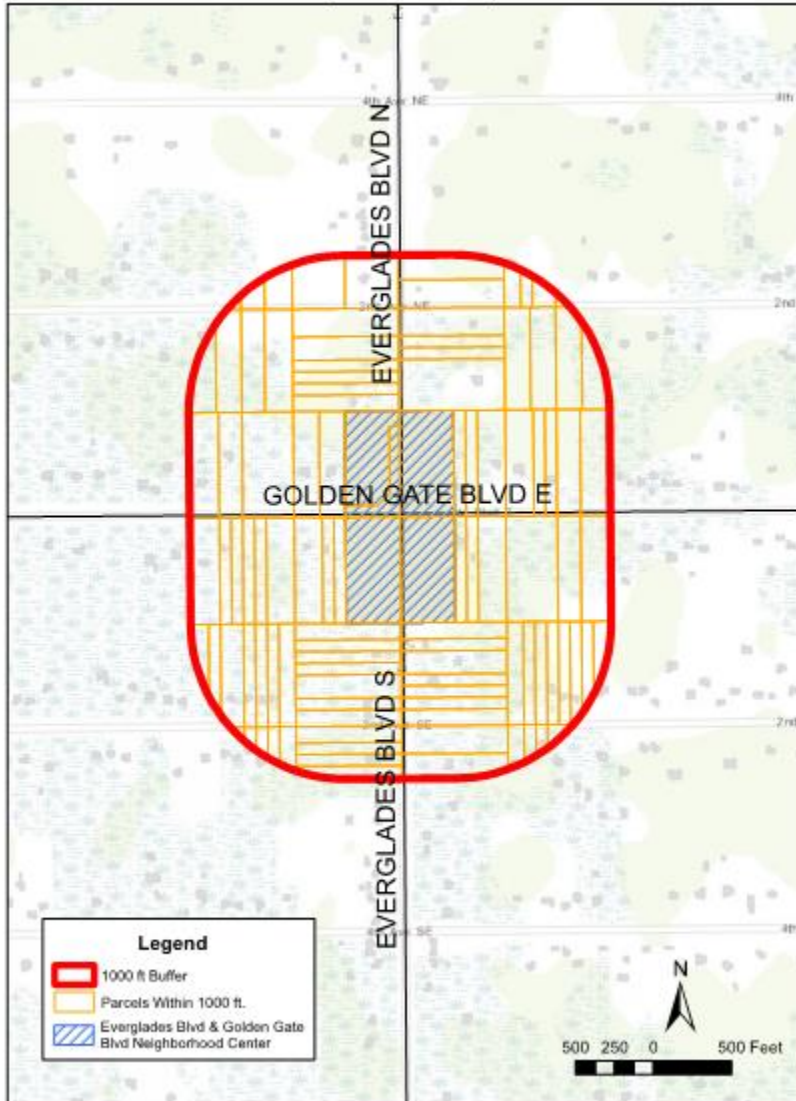
- Page 2: A. Vacant Neighborhood Center Maps (2)
- Page 4: B. Parcel Utility Analysis (neighborhood center types and building area)
- Page 9: C. Demand Analysis, Golden Gate Blvd. and Everglades Blvd.
- Page 15: D. Demand Analysis, Everglades Blvd. and Immokalee Rd.

We want to know what you think about the size of Neighborhood Centers. [Click here for a very brief survey to register your opinion.](#)

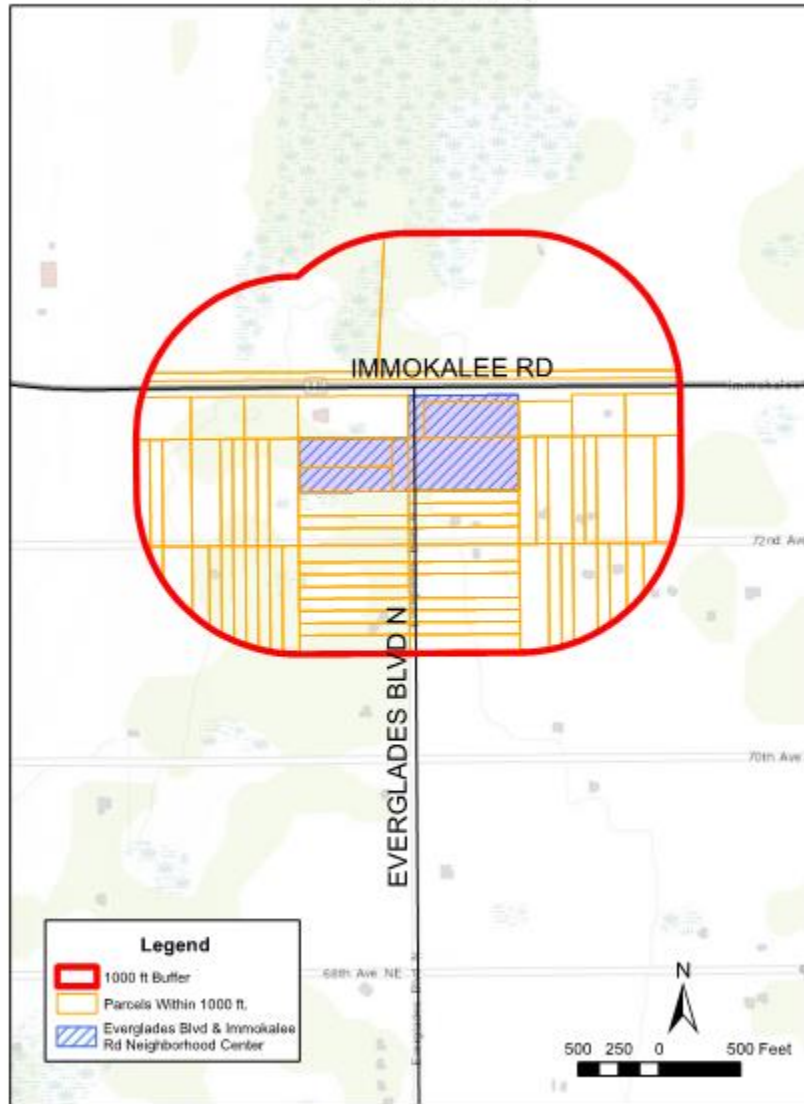
Map, data and graphic support: Metro Forecasting Model

Neighborhood Center Maps and Properties Within 1,000 Feet

**Everglades Blvd & Golden Gate Blvd Neighborhood Center Parcels
(within 1000 ft.)**



Everglades Blvd & Immokalee Rd Neighborhood Center Parcels
(within 1000 ft.)



B. Golden Gate Estates Neighborhood Shopping Center Parcel Utility Analysis

General Discussion

The land area required to build a commercial shopping center is based on many factors including zoning, setbacks, buffers, parking requirements, environmental conditions/wetlands and availability of public utilities (water/sewer). The main unknown in any residential or potentially commercial sites in the Estates is the presence of wetlands, endangered species or hydric soils. The analysis below assumes there are no environmental issues that would reduce the developed area of a theoretical site. For any specific site where development is limited by certain environmental conditions, that amount of land area would need to be added to total parcel area needed. For example, if a five-acre project was proposed and two of the acres are not developable, then about seven acres would be needed to accommodate the five-acre project.

Aside from the environmental conditions, the other limiting factor for commercial projects in the Estates is the lack of potable water and sanitary sewer. The lack of water and sewer service can be mitigated by wells, storage tanks (for fire suppression) and septic/drainfields for proposed projects. A good example of existing significant development without potable water and sewer are the three public schools, churches and the commercial developments at Wilson and Golden Gate Boulevard – all of which were developed without public utilities. For this analysis, it is assumed that all future commercial projects will have only wells and septic for their water and sewer needs, and land for these utilities is included in the land area needs requirement for each type of center.

Due to buffer and setback requirements for all future centers in the Estates, the larger the parcel proposed for development, the more efficient the project will be in terms of building area per gross acre of land.

Convenience Store + Take Out Food (Approximately 15,000 sf GLA)

Based on an evaluation of the 7-11 at Wilson and Golden Gate Boulevard, the site area is 5 acres and has an existing building area of 8,113 sf. This site appears to have additional land that could accommodate more building area in the future.

Based on an evaluation of the Walgreens also at Wilson and Golden Gate Boulevard, the site area is 4.15 acres and there is an existing 16,555 sf building on this site.

After a review of these two small centers, 5 acres with no environmental limitations could accommodate at least 16,000 sf of building area. The calculated commercial yield per acre is about 4,000 sf of building per acre of developable land.

Sample 7-11 Photos

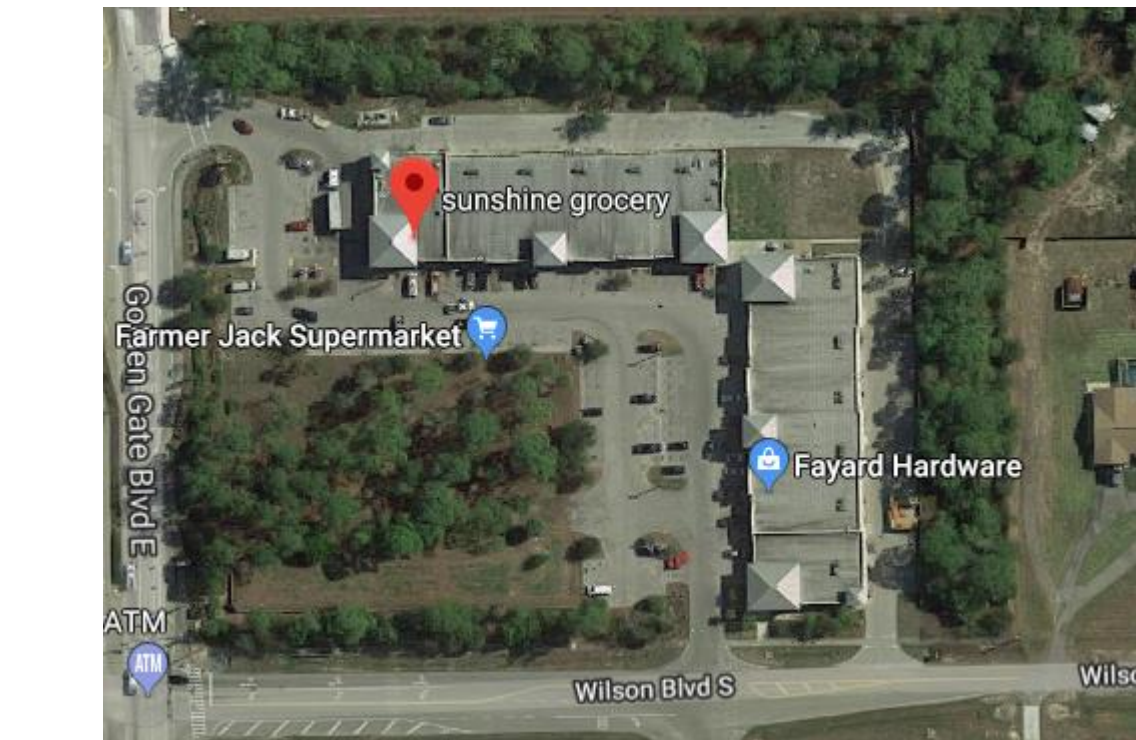
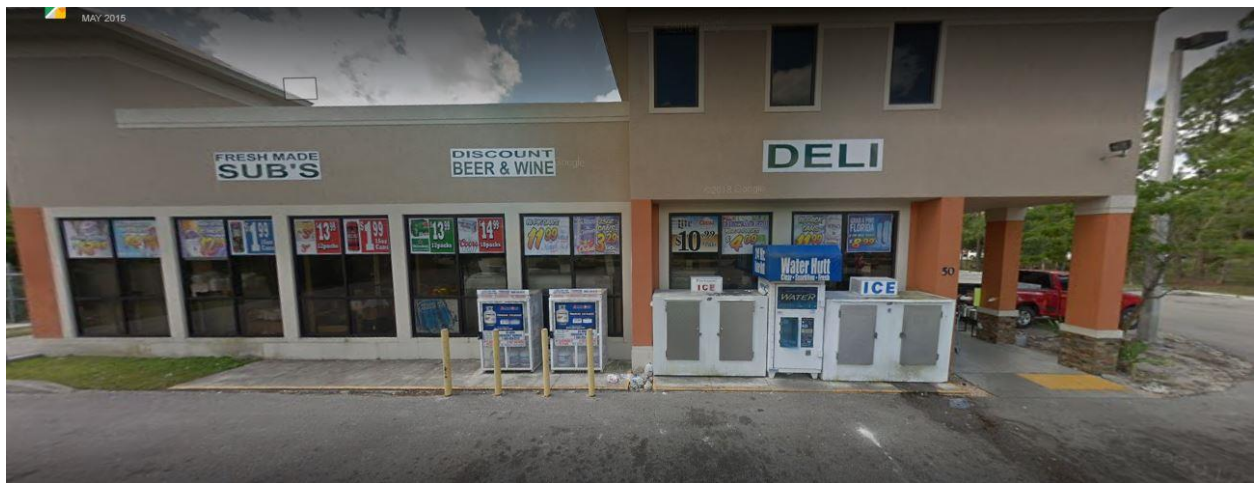


Small Neighborhood Center (Approximately 40,000 sf GLA)

Based on an evaluation of the Wilson Shopping Center located in the southeast quadrant at Wilson and Golden Gate Boulevard, the site area is 7.15 acres and has an existing building area of 35,856 sf with a vacant outparcel allowing another 6,000 for a total of 42,000. This site presently has a “grocery store” with about 3,500 sf of retail area. The variety of food available is comparable to the Walgreens across the street with the addition of some limited fresh produce available.

The calculated commercial yield per acre is about 5,800 sf of building per acre of developable land.

Sample Wilson Shopping Center Photos



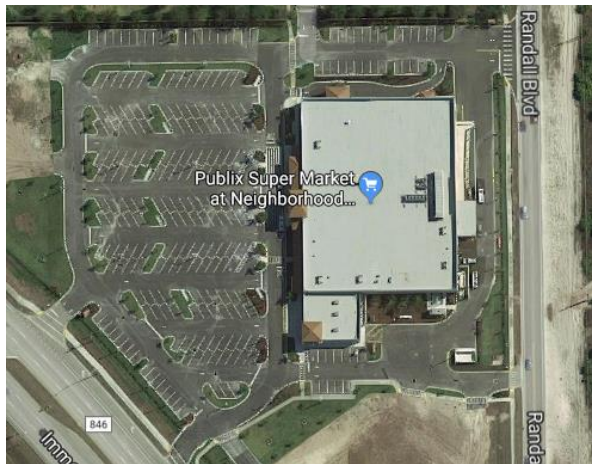
Medium Neighborhood Center (Approximately 60,000 sf GLA)

Presently, there are no Medium Grocery Anchored Neighborhood Centers in the Estates. The Randall Boulevard Publix was evaluated for both the building area and the parcel area. The Randall Publix is approximately 50,700 sf and includes the grocery anchor and two ancillary shops (currently a nail salon and a Chinese restaurant with limited seating/take-out). This center is on a parcel that is approximately 6 acres. The center has public utilities and therefore is not a perfect comparison for a similar center in the Estates, but it does provide a minimum parcel size.

To adjust for a similar center in the Estates, the Wilson Shopping Center is a rough guide in that it provides 42,000 sf of building area on 7.15 acres. By extrapolating the Wilson Shopping Center parcel area to accommodate a 60,000 sf hypothetical Neighborhood Shopping Center, approximately 10 gross acres would be necessary.

The calculated commercial yield per acre is estimated to be about 6,000 sf of building per acre of developable land.

Sample Publix at Randall Photos

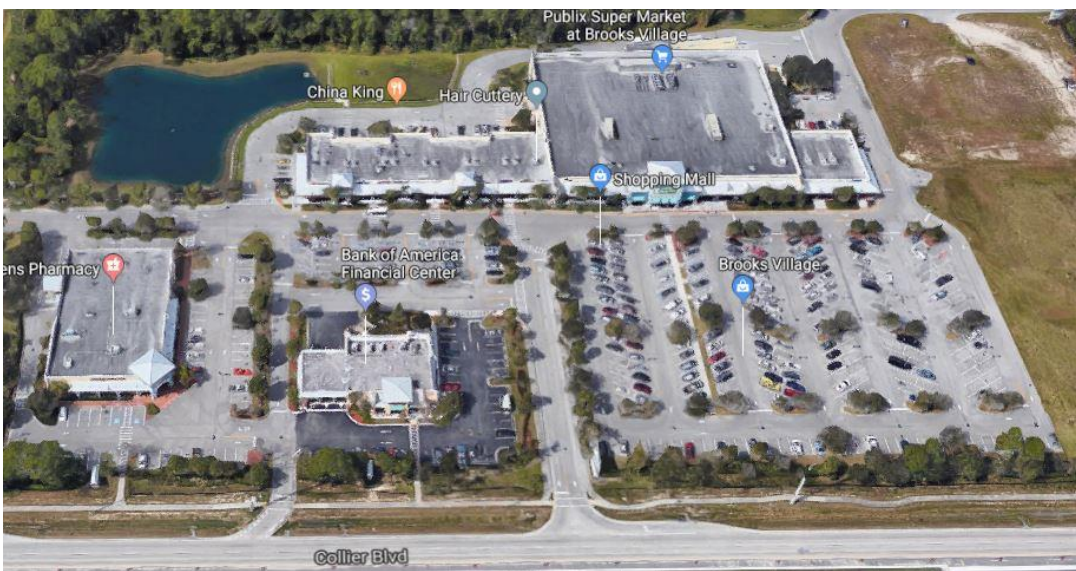


“Average” Neighborhood Center (Approximately 116,000 sf GLA)

As with the medium sized neighborhood center, there are no “Average” Grocery Anchored Neighborhood Centers in the Estates. The proposed Estates Shopping Center on the northwest corner of Wilson and Golden Gate Boulevard was originally designed for 225,000 sf of building area and had a gross parcel size of about 41 acres. The calculated commercial yield per acre for this center is about 5,500 sf of building per acre of developable land. However, this center had certain characteristics reducing efficiency of the development including a well-field overlay and two public roads through the site.

Based on the review of the proposed Estates Shopping Center and the Wilson Shopping Center it appears the likely yield for larger commercial projects will be about 6,000 sf of building area per acre.

Sample Brooks Village an “Average” Neighborhood Shopping Center Photos



C. Neighborhood Shopping Center Demand – Golden Gate Blvd and Everglades Blvd

What is a neighborhood shopping center?

According to the International Council of Shopping Centers, neighborhood shopping centers are defined as “convenience oriented” centers with a supermarket being the most typical type of commercial anchor. Being convenience-oriented, neighborhood centers are ideally located near the residents they serve, or on arterial roads taken by consumers to work or other commercial opportunities. In addition to a supermarket anchor, neighborhood centers also typically include some ancillary commercial, such as salons, restaurants, offices, banks, drug stores, and fast food.

In Collier County, neighborhood shopping centers range anywhere from 40,000 square feet to 180,000 square feet. The average neighborhood shopping center in Collier County is approximately 116,500 square feet and 16 acres. Neighborhood shopping centers typically contain associated retail and office uses for the sake of convenience, but do not require additional commercial space to serve the purpose of a neighborhood center. For example, the Publix at Randall and Immokalee, which is only 50,770 square feet on 6 acres, serves the needs of a grocery center for local residents while the demand for additional services, such as fast food, are met elsewhere in the County.

To maintain the existing commercial Level of Service (LOS), Collier County would need to maintain approximately one neighborhood shopping center per every 15,200 residents.

CIGM Commercial Demand Model

The CIGM identified the Everglades Boulevard and Golden Gate Boulevard Neighborhood Center as a suitable location for a grocery anchored neighborhood shopping center to serve the needs of the local residents. At buildout, the Estates population will be 82,309 which is enough to support 5 neighborhood shopping centers. There are currently three existing centers that support Estates residents, two on Collier Boulevard and one on Randall Boulevard. CIGM data indicates there will be a demand for two additional centers by buildout.

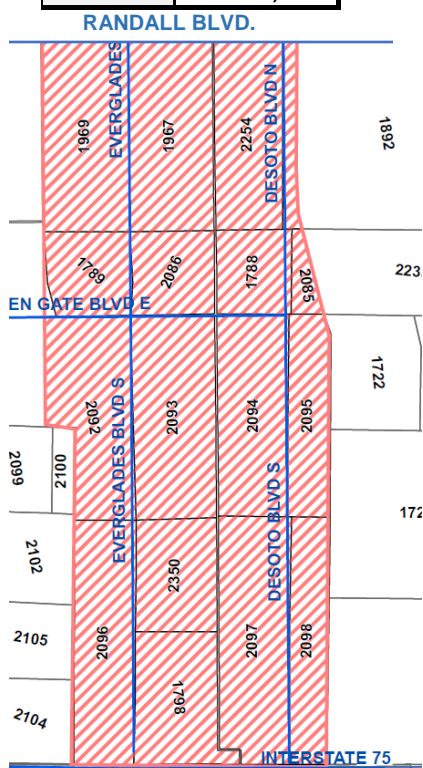
Golden Gate and Everglades Intersection Total Market Area

Total Market - GG/EV	
2017	7,654
2020	9,463
2025	12,532
2030	15,279
2035	17,434
2040	18,940
2045	19,881
2050	20,437
Buildout	21,270

The market area for a neighborhood shopping center is defined by the local population which can support a given use. When determining the market area of a neighborhood center, it is important to identify the population supporting it given its proximity to residents. Research in Collier County indicates the market area of a neighborhood shopping center encompasses approximately 15,200 residents. Because Traffic Analysis Zones are rather small and granular, a group of zones will make up the market area of any potential shopping center, as pictured. The total market area being analyzed for commercial potential at Everglades Boulevard and Golden Gate Boulevard includes zones in the Rural

Estates south of Randall Boulevard and north of Interstate-75. This center's market area excludes demand generated by residents of the RLSA, including Rural Lands West and the RFMUD. RLSA and RFMUD towns and villages will have their own neighborhood centers to serve their population needs.

Currently, this market area has 7,654 residents and 2,798 households, making up about half of the demand required to support one neighborhood shopping center. By 2025, zones in this market area will have the functional population to justify the planning of a neighborhood shopping center. By 2030, the market area will have a population of 15,279, which can fully support a neighborhood shopping center for local residents.



Vehicle Miles Travelled and Trips

Neighborhood shopping centers provide an essential service: the availability of food and other necessary goods. However, not all trips to the grocery store are unique or dedicated. There is the trip home from work where one stops and picks up a few necessary items. There are also specific trips or dedicated trips to the store

by the household shopper where home is the origin and final destination. The former, or trip home from work, is called a pass-by trip. Based on the location of the proposed center, the transportation corridor and the lack of alternative grocery stores in the immediate area, 35% of the trips will be pass-by and 65% will be dedicated. It is important to ensure dedicated trips are as short as possible in order to reduce greenhouse gases and burden on infrastructure. Analyzing the number of dedicated trips and Vehicle Miles Travelled (VMT), is an important aspect of ensuring neighborhood shopping centers are ideally located in the community.

Everglades/Golden Gate Market Area Trip Generation

Total Market Housing	
2017	2,798
2020	3,454
2025	4,562
2030	5,550
2035	6,321
2040	6,856
2045	7,188
2050	7,381
Buildout	7,600

The potential commercial intersection at Everglades Boulevard and Golden Gate Boulevard has been identified as a potential destination alternative to the neighborhood shopping center at Collier Boulevard and White and the neighborhood center at Randall Boulevard and Immokalee Road.

The closest existing Neighborhood shopping center alternative to the intersection of Everglades and Golden Gate is Publix at Orangetree, located approximately 6 miles from the intersection of Everglades Boulevard and Golden Gate Boulevard. There are currently 2,798 homes within the market area surrounding Everglades Boulevard and Golden Gate Boulevard. Ultimately, there will be 7,600 homes in this market area.

According to the Food Marketing Institute the average number of trips to the grocery store per week is 2 per consumer. For the purposes of this analysis, a conservative interpretation of the stated metric will be a consumer is a household regardless of the number of consumers live in each household (1 household = 1 consumer). Trips generated by the center for needs other than groceries (i.e. dining, coffee, postal services, personal service, etc.) have been excluded. To determine the number of trips that will be generated DAILY for neighborhood shopping in the market area, the following formula will be used:

$$\frac{\# \text{ of Households} \times 2 \text{ Trips [per week]} \times .65 \text{ [dedicated trips]}}{7 \text{ [days in a week]}} = 1,411 \text{ daily trips}$$

Ultimately, there will be an average of 1,411 daily trips in this market area as a result of current and future residents regularly driving to neighborhood shopping centers.

Golden Gate Blvd East Trips

The future Estates Neighborhood Shopping Center at Wilson Boulevard and Golden Gate Boulevard has been proposed to serve the area as it grows. When the center is developed, residents in the established market area will most likely use this as their primary neighborhood shopping center due to its proximity.

Analyzing aerial photography and zone maps, it is assumed that not every resident in the market area will utilize this center, however. A certain number of residents may prefer the Orangetree Publix neighborhood center for dedicated trips due to its proximity to home. Using the map, it can be assumed roughly 80% of residents in this area would prefer the Wilson shopping center, when developed, based on distance alone.

Of 1,411 neighborhood trips generated by this market area, approximately 1,129, or 80%, of these are assumed to be absorbed by the future shopping center at Wilson Boulevard. This means Golden Gate Boulevard, west of Everglades will bear an additional 1,129 trips daily without a neighborhood shopping center at Everglades Boulevard and Golden Gate Boulevard.

$$\# \text{ of Households} \times 2 \text{ Trips [per week]} \times .65 \text{ [dedicated trips]}$$

x 80%

$$7 \text{ [days in a week]}$$

$$7,600 \times 2 \times .65$$

$$= 1,411 \times .8 = 1,129$$

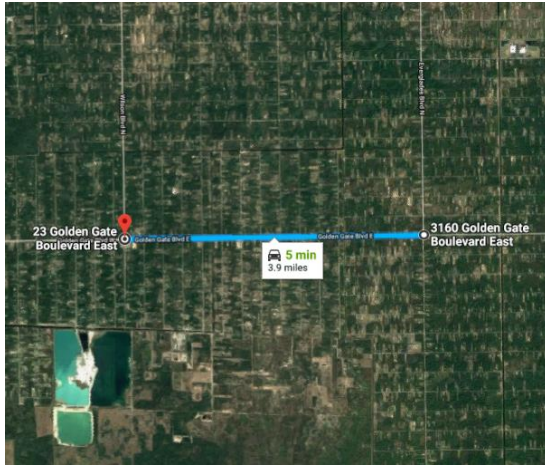
7

The background trips on this segment of Golden Gate Boulevard (Everglades to Wilson) is 20,318. Therefore, approximately 5% of the background traffic with a center at Everglades and Golden Gate Boulevard can be avoided.

Collier County Quarterly Traffic Count Report 2017

Station	Type Cnt	Location	Q1-2017	Q2-2017	Q3-2017	Q4-2017
652	Q	Golden Gate Blvd (CR 876) east of Wilson Blvd	0	0	0	20,318

Weekly Vehicle Miles Travelled (VMT)



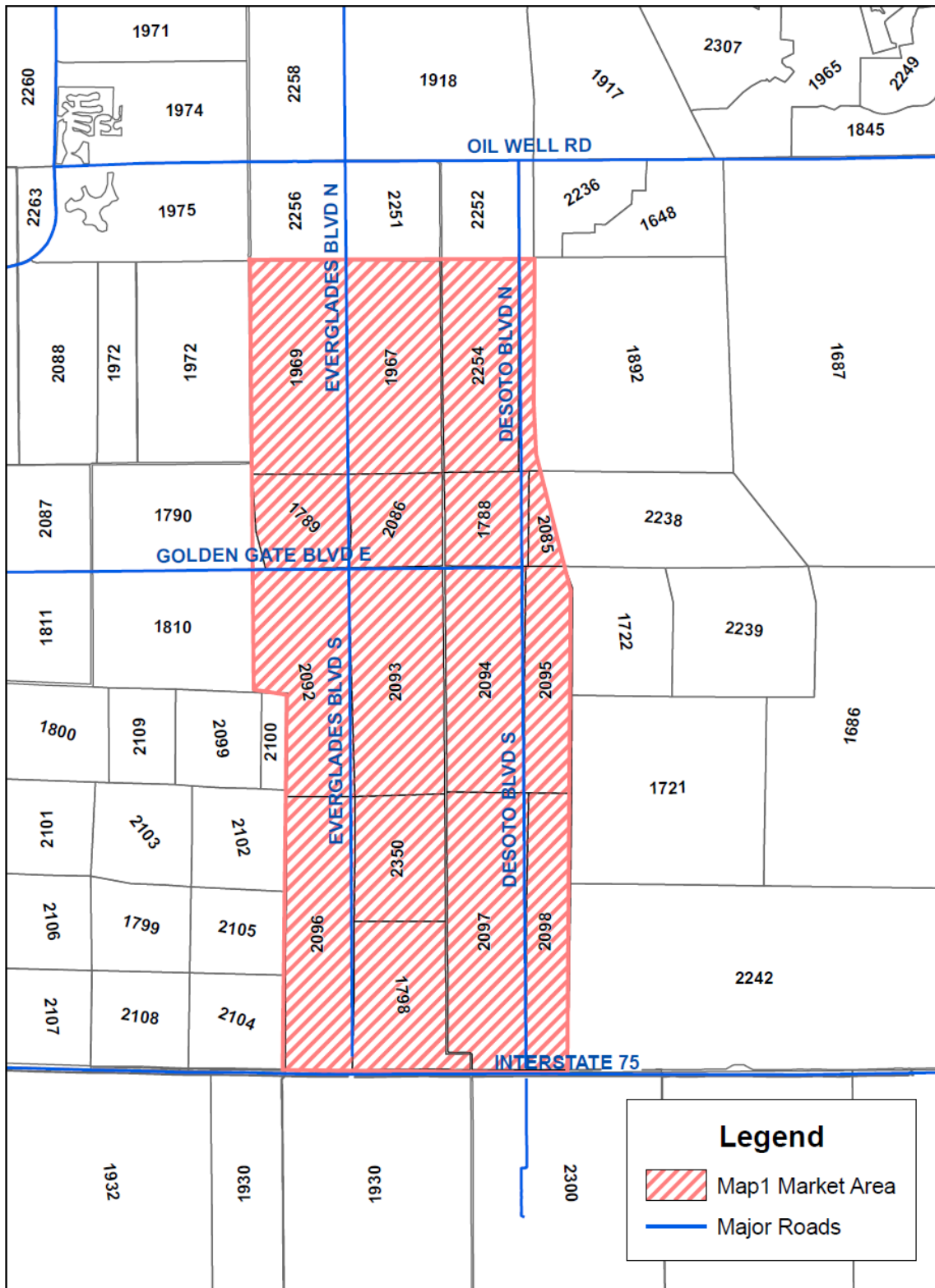
To determine the reduction in the number of weekly vehicle miles travelled (VMT) it is essential to understand the number of trips and the difference between trip lengths. There are approximately 4 miles between the intersection of Golden Gate and Everglades Boulevard and the intersection of the Estates shopping center at Wilson. If a shopping center is not accepted at the intersection of Golden Gate and Everglades, patrons in the established market area will presumably drive an additional 4 miles each way per neighborhood shopping trip to the Wilson intersection. As established, this market area will generate approximately 1,129 daily trips for dedicated neighborhood shopping.

neighborhood trips per day X 7 days a week X Distance each way X 2 [round trip]

$$1,129 \times 7 \times 4 \text{ miles each way} \times 2 = 63,232$$

With 1,129 dedicated neighborhood trips per day, there are an average of 7,904 trips per week. Without a neighborhood shopping center located at Everglades Boulevard and Golden Gate Boulevard, residents of this market area will drive an additional distance of 4 miles each way, or an additional 8 miles round trip. This results in an increased VMT of 63,232 miles weekly. Annually, this results in an increased VMT of 3,288,064 miles a year.

MAP 1: TOTAL MARKET AREA (Everglades Blvd & Golden Gate Blvd)



D. Neighborhood Shopping Center Demand – Everglades Boulevard and Immokalee Road

What is a neighborhood shopping center?

According to the International Council of Shopping Centers, neighborhood shopping centers are defined as “convenience-oriented” centers with a supermarket being the most typical type of commercial anchor. Being convenience-oriented, neighborhood centers are ideally located near the residents they serve, or on arterial roads taken by consumers to work or other commercial opportunities. In addition to a supermarket anchor, neighborhood centers also typically include some ancillary commercial, such as salons, restaurants, offices, banks, drug stores, and fast food.

In Collier County, neighborhood shopping centers range anywhere from 40,000 square feet to 180,000 square feet. The average neighborhood shopping center in Collier County is approximately 116,500 square feet and 16 acres. Neighborhood centers typically contain associated retail and office uses for the sake of convenience, but do not require additional commercial space to serve the purpose of a neighborhood center. For example, the Publix at Randall and Immokalee, which is only 50,770 square feet on 6 acres, serves the needs of a grocery center for local residents while the demand for additional services, such as fast food, are met elsewhere in the County.

To maintain the existing commercial Level of Service (LOS), Collier County would need to maintain approximately one neighborhood shopping center per every 15,200 residents.

CIGM Commercial Demand Model

At buildout, the Estates population will be 82,309 which is enough to support 5 neighborhood shopping centers. There are currently three existing centers that support Estates residents, two on Collier Boulevard and one on Randall Boulevard. CIGM data indicates there will be a demand for two additional centers by buildout.

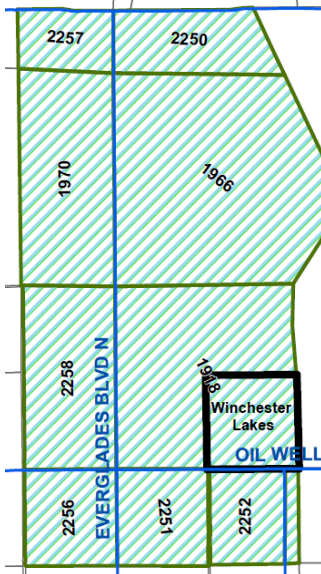
Neighborhood Center Demand at Immokalee Rd and Everglades Blvd

Market Area Pop.	
2017	4,792
2020	6,400
2025	9,373
2030	12,278
2035	14,537
2040	15,697
2045	16,349
2050	16,721
Buildout	17,525

The market area for a neighborhood shopping center is defined by the local population supporting a given use. When determining the market area of a neighborhood center, it is important to identify the population supporting it given its proximity to residents. Research in Collier County shows the market area of a neighborhood shopping center is approximately 15,200 residents. The total market area being analyzed for commercial potential at Everglades Boulevard and Immokalee Road includes zones south of Immokalee Road and north of Oil Well Road, including the future village of Winchester Lakes.

There are currently over 4,792 residents in the market area. By 2025, the market area will have more than 60% of the population necessary to support a neighborhood shopping center on its own. Including the Village of Winchester Lakes, the residents in this area will have a population of 14,537 by 2035.

There are two practical alternatives to Everglades Boulevard and Immokalee Road for commercial development. One opportunity is the existing 40-acre site at Orange Blossom Ranch. A second alternative is potential commercial in front of Winchester Lakes. A neighborhood center at the Everglades and Immokalee intersection could potentially impact existing and future Estates residents. The alternative sites are better located and more compatible for a neighborhood shopping center. It is important to note that commercial services may also be more feasible in Orange Blossom Ranch and Winchester Lakes due to the availability of municipal water and sewer services.



Vehicle Miles Travelled and Trips

Neighborhood shopping centers provide an essential service: the availability of food and other necessary goods. Not all trips to the grocery store are unique or dedicated. There is the trip home from work where one stops and picks up a few necessary items. There are also specific trips or dedicated trips to the store by the household shopper where home is the origin and final destination. The former, or trip home from work, is called a pass-by trip. Based on the location of the proposed center, the transportation corridor and the lack of alternative grocery stores in the immediate area, 35% of the trips will be pass-by and 65% will be dedicated. It is important to ensure dedicated trips are as short as possible in order to reduce greenhouses gases and burden on infrastructure. Analyzing the number of dedicated trips and Vehicle Miles Travelled (VMT), is an important aspect of ensuring neighborhood shopping centers are ideally located in the community.

Golden Gate/Immokalee Market Area Trip Generation

The potential commercial intersection at Everglades Boulevard and Immokalee Road has been identified as a potential destination alternative to the neighborhood shopping center at Immokalee Road and Randall Boulevard.

Market Area Housing	
2017	1,752
2020	2,400
2025	3,606
2030	4,798
2035	5,713
2040	6,129
2045	6,348
2050	6,467
Buildout	6,602

The closest existing Neighborhood shopping center alternative to the intersection of Everglades Boulevard and Immokalee Road is Publix at Orangetree, located approximately 9 miles away. There are currently 1,752 homes within the market area established above. Ultimately, there will be 6,602 homes in this market area.

According to the Food Marketing Institute the average number of trips to the grocery store per week is 2 per consumer. For the purposes of this analysis, a conservative interpretation of the stated metric will be a consumer is a household regardless of the number of consumers live in each household (1 household = 1 consumer). Trips generated by the center for needs other than groceries (i.e. dining, coffee, postal services, personal service, etc.) have been excluded. To determine the number of trips that will be generated DAILY for neighborhood shopping in the market area, the following formula will be used:

$$\# \text{ of Households X } 2 \text{ Trips [per week] X } .65 \text{ [dedicated trips]}$$

$$7 \text{ [days in a week]}$$

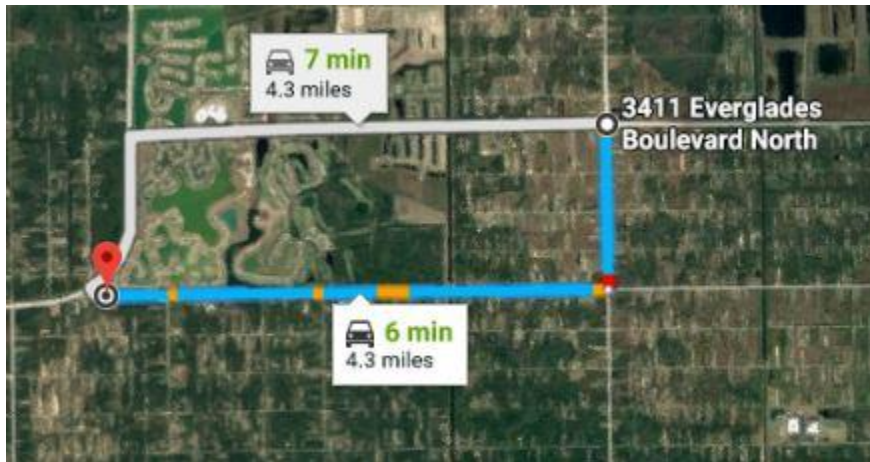
$$6,602 \text{ X } 2 \text{ X } .65$$

$$= 1,226 \text{ daily trips}$$

$$7$$

Ultimately, there will be an average of 1,226 daily trips in this market area as a result of residents regularly driving to neighborhood shopping centers.

Weekly Vehicle Miles Travelled (VMT)



To determine the reduction in the number of weekly vehicle miles travelled (VMT) it is essential to understand the number of trips and the difference between trip lengths. Two locations have been identified as alternatives to a shopping center at Everglades Boulevard and Immokalee Road. Orange Blossom Ranch has land allocated for commercial and Winchester Lakes will have the density and utilities to support commercial development. The midpoint between these two locations is at the intersection of Everglades Boulevard and Oil Well Road. This intersection is roughly 4 miles away from the existing Orangetree Publix at Randall Boulevard.

neighborhood trips per day X 7 days a week X Distance each way X 2 [round trip]

$$1,226 \times 7 \times 4 \text{ miles each way} \times 2 = 63,232$$

This market area will generate 1,226 dedicated neighborhood trips per day, an average of 8,582 trips per week. Without a neighborhood shopping center located at Winchester Lakes or Orange Blossom, residents of this market area will drive an additional distance of 4 miles each way, or an additional 8 miles round trip. This results in an increased VMT of 68,660 miles weekly. Annually, this results in an increased VMT of 3,570,361 miles a year.



MAP 3: EVERGLADES BLVD & IMMOKALEE RD

