



TRANSIT ALTERNATIVES ANALYSIS OF THE ROUTE 7 CORRIDOR

Market Overview (Draft Report)

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Prepared for:
Parsons Brinckerhoff

**PARSONS
BRINCKERHOFF**

Prepared by:
Partners for Economic Solutions (PES)





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Executive Summary

As congestion grows, the importance of transit alternatives along existing auto-oriented thoroughfares continues to gain priority in regional planning efforts. The Route 7 Transit Corridor Alternatives Analysis is reviewing a new transit connection in Northern Virginia across jurisdictions along Route 7. The route proposes to link four Metro lines – the Silver Line in Tysons Corner, the Orange Line in Falls Church, and the Blue and Yellow Lines in Alexandria.

To understand the market context for the alternative routes, more specifically the potential for redevelopment along the corridor, Parsons Brinkerhoff hired Partners for Economic Solutions to prepare an overview of market conditions and a scan of underutilized properties.

As both the Washington DC metropolitan region and Northern Virginia gained new residents and businesses, the Route 7 corridor study area increased its number of residents by 11.9 percent from 1990 to 2000 and 7.7 percent from 2000 to 2010. The growth slowed over the last decade, reflecting the built-up nature of the corridor. A review of the household mix showed a shift in favor of larger households for most of the corridor. In some sectors along the corridor, like Alexandria’s Old Town and Tysons Corner new multi-family developments helped grow households more rapidly than population. Population projections done by the Metropolitan Washington Council of Governments (MWCOG) in conjunction with local jurisdictions, suggest Alexandria, Tysons Corner and Baileys Crossroads/Beauregard Boulevard will capture the most population growth throughout the Route 7 corridor. The market overview highlighted the shifting national demographic trends that impact residential real estate with new households increasingly attracted to close-in locations with easy access to transit.

Shifting demographic trends indicate that ***new households are increasingly attracted*** to close-in locations with ***easy access to transit***

Recent income data shows the affluent nature of study area households with a median household income of \$95,000 in 2010. While pockets of low-income households, estimated at almost one-quarter of corridor households, earning less than \$50,000 exist along the corridor, the median household income at Tysons Corner reached \$151,700 in 2010.



While the economic downturn slowed the traditional trajectory of employment growth in Northern Virginia, the area rebounded and projections for the future anticipate growth in professional, scientific and technical services, education services and health care industries. These MWCOC growth projections show a large amount of employment growth along the Route 7 corridor, particularly in Tysons Corner with almost 48,000 new jobs and Pimmit Hills, Baileys Crossroads/Beauregard Boulevard and Western Alexandria/Eisenhower Valley each with 21,000 to 22,000 new jobs by 2040. Accommodating this growth will require the replacement of obsolete space and more dense development along the Route 7 corridor for office development. New office space constructed to meet new demand and replacement of obsolete space would total 17.9 million square feet by 2040.

Pipeline projects in the corridor include a variety of multi-family developments as developers seek to redevelop and intensify commercial developments with new housing. Major new multi-family developments are proposed for several sites in the Tysons Corner area with the introduction of Metro Silver Line service in late 2013 and the adoption of a new plan that seeks to create walkable mixed-use developments for a more sustainable future for the area, one less dependent on auto traffic and less constrained by the area's massive congestion delays. The Landmark shopping center site will incorporate major new housing and the Beauregard Boulevard corridor is envisioned for major residential redevelopment at significantly higher densities than now exist. The MWCOC household projections anticipate the need for construction of 49,200 new housing units by 2040. The corridor's construction patterns of the last decade and the proposed developments suggest that 75 percent of that new housing will be developed in multi-family structures.

The potentials for other types of commercial development vary based on use type and availability of sites with necessary visibility, accessibility and other site selection criteria essential to capture customers. Retail development requires a more detailed review of market conditions and specific trends. Retailing is marked by continuous shifting and churning as retailers seek better locations and newer facilities. In general, Falls

Built out nature of Route 7 corridor suggest ***intensification of existing development*** and ***redevelopment of underutilized*** parcels will increase with new transit

Church/Seven Corners, Baileys Crossroads/Beauregard Boulevard, Old Town and Braddock Road/ Del Ray could each support a new grocery store. More restaurants could be supported in Falls Church/Seven Corners, Baileys Crossroads/Beauregard Boulevard, West Alexandria/Eisenhower Valley and Braddock Road/Del Ray. Future hotel development demand relates most specifically to the opening of Metro's Silver Line near Tysons Corner.

Identifying opportunities for redevelopment and new development along the Route 7 corridor required a review of



property values to identify underutilized properties. PES reviewed this data using Geographic Information System (GIS) to identify and map these underutilized properties along the Route 7 corridor. This analysis highlighted a large portion of underutilized parcels in Tysons Corner with available surface parking lots, along Eisenhower Boulevard with older industrial properties, and other sections along Route 7. This first scan of potential redevelopment and development parcels must be reviewed in more detail to understand other factors limiting development including, environmental, historic, or related infrastructure constraints.

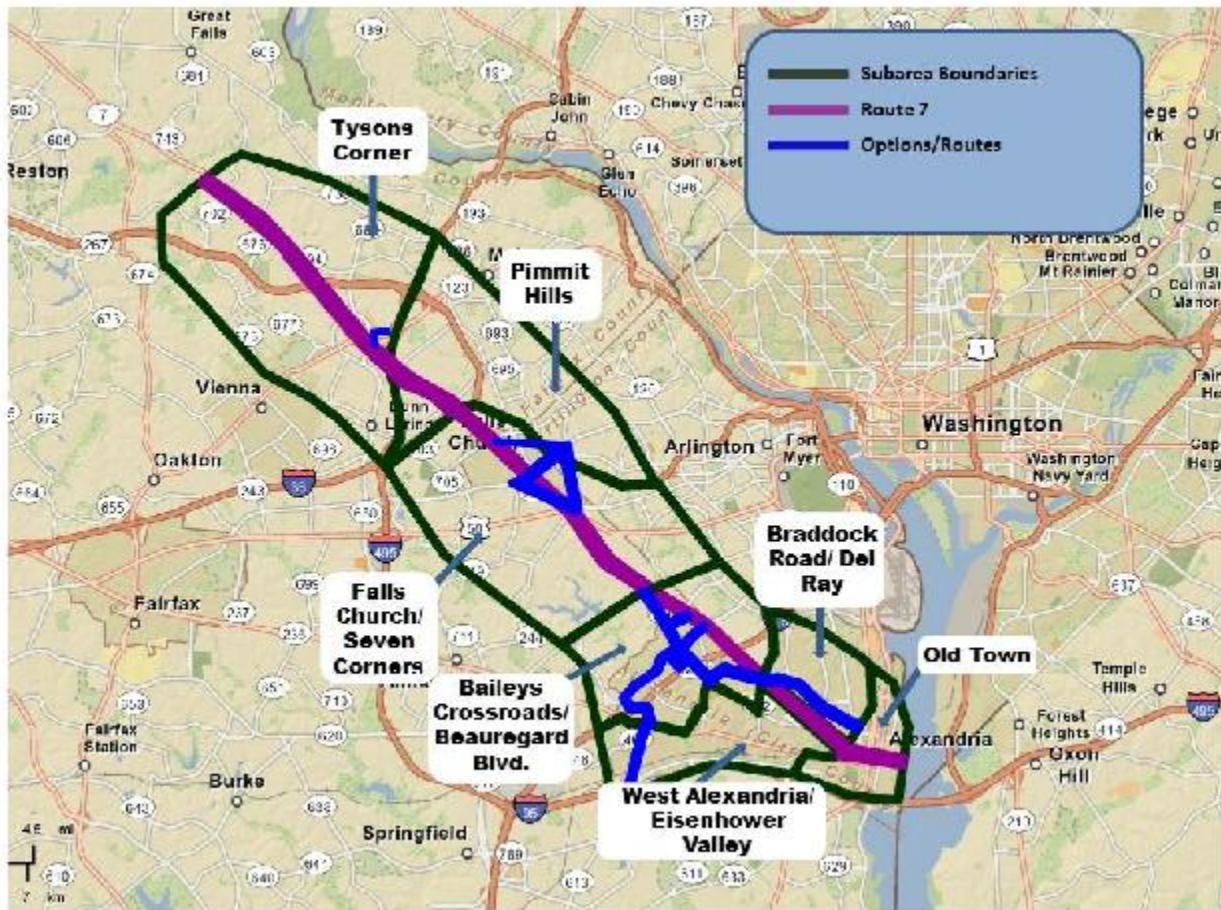


I. Introduction

The Route 7 corridor is being considered for transit alternatives extending from Tysons Corner to Old Town Alexandria. This circumferential route proposes to link four Metro lines – the Silver Line in Tysons Corner, the Orange Line in Falls Church, and the Blue and Yellow Lines in Alexandria. The Parsons Brinckerhoff team is conducting an alternatives analysis for the corridor, considering alternative routes. Partners for Economic Solutions has prepared this market overview to provide context for the evaluation and a foundation for later estimates of the potential development impacts of new transit service.

The alternative corridors and study area being considered are shown on the map on the following page. The study area extends roughly one half-mile on each side of the corridor through Fairfax County and Falls Church and encompasses much of Alexandria north of the Beltway and southwest from W. Glebe Road.

Route 7 Alternative Transit Routes and Options and Market Subareas



II. Demographic and Employment Trends

The Route 7 corridor encompasses diverse and distinct submarkets. To provide meaningful trend data, PES has subdivided the corridor into seven submarkets as shown on the preceding map:

- Tysons Corner
- Pimmit Hills
- Falls Church/Seven Corners
- Bailey's Crossroads/Beauregard Corridor
- West Alexandria/Eisenhower Valley
- Braddock Road/Del Ray
- Old Town

Population and employment diversity exists even within the subareas.

For context, data also are provided for the five Northern Virginia jurisdictions closest to the District of Columbia ("Close-In Northern Virginia"): Alexandria, Arlington County, Falls Church, Fairfax City and Fairfax County.

Population Trends

Population in the five Close-In Northern Virginia jurisdictions (Alexandria, Arlington County, Fairfax City, Fairfax County and Falls Church) increased by almost 190,000 persons or 16.8 percent from 1990 to 2000. The growth rate then slowed to 11.0 percent or 145,000 new residents from 2000 to 2010. Within the Route 7 corridor study area, the population increased more slowly – 11.9 percent from 1990 to 2000 and 7.7 percent from 2000 to 2010. This disparity reflects the built-up nature of the corridor and trends toward smaller household sizes.

Corridor residents have a somewhat higher median age of 37.0 years as compared with 36.5 years in the five close-in jurisdictions as a whole. This is due primarily to the older ages of Tysons Corner and Old Town residents. Appendix Table A-1 provides population trends by each of the seven submarkets.

Table 1. Population and Households Trends, 2000-2010

	Close-In Northern Virginia		Route 7 Corridor	
	Number	Percent	Number	Percent
Population Trends				
1990	1,129,903		317,254	
2000	1,319,447		355,097	
2010	1,464,216		382,265	
1990-2010 Change	334,313	29.6%	65,011	20.5%
1990-2000 Change	189,544	16.8%	37,843	11.9%
2000-2010 Change	144,769	11.0%	27,168	7.7%
Household Trends				
1990	435,702		135,986	
2000	511,499		151,510	
2010	550,628		154,872	
1990-2010 Change	114,926	26.4%	18,886	13.9%
1990-2000 Change	75,797	17.4%	15,524	11.4%
2000-2010 Change	39,129	7.6%	3,362	2.2%

Source: ESRI, 2010 Census Profile, 1990-2000 Comparison Profile; Partners for Economic Solutions, 2013.

Households grew somewhat more slowly than did population as the household mix changed in favor of larger households. As detailed in Appendix Table A-2, this was particularly pronounced in the Baileys Crossroads/Beauregard Boulevard, Falls Church/Seven Corners and Pimmit Hills submarkets in the 1990s. In contrast, Old Town, Braddock Road/Del Ray and Tysons Corner households increased at a faster rate than population from 2000 to 2010 as new multi-family housing was developed.

Almost 65 percent of Close-In Northern Virginia households own their own homes; within the Route 7 corridor that proportion is lower at 58.4 percent. The tenure split varies significantly among the submarkets, ranging from 42.5 percent owners in Baileys Crossroads/Beauregard Boulevard up to 80.6 percent in Tysons Corner, as shown in Appendix Table A-3. Fully two-thirds of Route 7 households have only one or two persons; 26 percent have three or four persons and 6.6 percent have five or more persons. Less than 56 percent of corridor households are families. Corridor households are smaller than Close-In Northern Virginia households with an average of 2.35 persons per households as compared with 2.48 persons per household, respectively. A much higher share of Route 7 corridor households have no car or one car – 50.9 percent as compared with 41.5 percent of Close-In Northern Virginia households. This reflects both the corridor’s transit accessibility and the relative household incomes. Twelve percent of Old Town households own no cars.

Table 2. Household Tenure, Type, Size and Vehicle Ownership, 2010				
	Close-In Northern Virginia		Route 7 Corridor	
	Number	Percent	Number	Percent
Tenure, 2010				
Owner	355,873	64.6%	90,444	58.4%
Renter	194,755	35.4%	64,428	41.6%
Total	550,628	100.0%	154,872	100.0%
Households by Type, 2010				
Family Households	344,928	62.6%	86,427	55.8%
Married-Couple Families	278,924	50.7%	67,573	43.6%
With Related Children	131,493	23.9%	30,078	19.4%
Other Family (No Spouse)	66,004	12.0%	18,854	12.2%
With Related Children	32,860	6.0%	9,529	6.2%
Non-Family Households	205,700	37.4%	68,445	44.2%
Households by Size, 2010				
1 Person Household	163,565	29.7%	56,262	36.3%
2 Person Household	171,894	31.2%	48,255	31.2%
3-4 Person Household	165,962	30.1%	40,208	26.0%
5+ Person Household	49,207	8.9%	10,147	6.6%
Households, 2010				
Average Household Size	2.48		2.35	
Vehicle Ownership, 2010				
None	32,106	5.8%	11,883	7.7%
Owns 1 vehicle	196,466	35.7%	66,932	43.2%
Owns 2 or more vehicles	322,056	58.5%	76,057	49.1%
Average Vehicles	1.4		1.6	

Source: U.S. Census Bureau, 2006-2010 ACS; Partners for Economic Solutions, 2013.

Table 3 shows households by income. Overall, households in the five jurisdictions in Close-In Northern Virginia had a median household income of \$101,400 in 2010. Though somewhat lower than the larger regional median, households in the Route 7 corridor had a median household income of \$95,000. This median masks a wide range in household incomes. More than 10 percent of corridor households had annual incomes less than \$25,000 with another 14 percent making between \$25,000 and \$50,000. On the high end of the range, more than one-quarter of households had incomes in excess of \$150,000. Across the corridor, median household incomes ranged from \$72,800 in Baileys Crossroads/Beauregard Boulevard to \$151,700 in Tysons Corner. The high median incomes reflect the market pressures that are increasing rents and prices to the point that many lower-income households are no longer able to find housing in the corridor.

Table 3. Households by Income, 2010

	Close-In Northern Virginia		Route 7 Corridor	
	Number	Percent	Number	Percent
Household Income				
Less than \$15,000	25,163	4.6%	8,590	5.5%
\$15,000 to \$24,999	20,672	3.8%	7,271	4.7%
\$25,000 to \$34,999	23,596	4.3%	7,302	4.7%
\$35,000 to \$49,999	45,310	8.2%	14,051	9.1%
\$50,000 to \$74,999	82,561	15.0%	24,103	15.6%
\$75,000 to \$99,999	74,566	13.5%	20,162	13.0%
\$100,000 to \$149,999	119,328	21.7%	31,327	20.2%
\$150,000 or More	159,432	29.0%	42,066	27.2%
Total Households	550,628	100.0%	154,872	100.0%
Median Household Income	\$101,382		\$95,000	
Mean Household Income	\$104,856		\$107,352	

Source: U.S. Census Bureau, 2006-2010 ACS; Partners for Economic Solutions, 2013.

Almost two-thirds of Close-In Northern Virginia and Route 7 corridor residents drive alone to work with another 10 percent carpooling. Commuting by transit is somewhat higher among Route 7 residents at 16.3 percent as compared with 13.3 percent in the larger region, as shown in Table 4. Appendix Table A-5 provides the breakdown by submarket. Transit is used by roughly one-quarter of commuters from Old Town and the West Alexandria/Eisenhower Valley submarkets, reflecting their superior access to Metro.

Table 4. Means of Transportation to Work, 2010

Workers 16 and Over	Close-In Northern Virginia		Route 7 Corridor	
	Employed Residents	Percent	Employed Residents	Percent
Means of Transportation				
Car, Truck, or Van	623,190	78.1%	156,907	74.2%
Drove alone	542,814	68.0%	136,607	64.6%
Carpooled	80,376	10.1%	20,300	9.6%
Public Transportation (excluding taxicab)	106,473	13.3%	34,555	16.3%
Motorcycle, Bicycle, Walked, Other Means or Worked at Home	68,700	8.6%	20,065	9.5%
Total	798,363	100.0%	211,527	100.0%

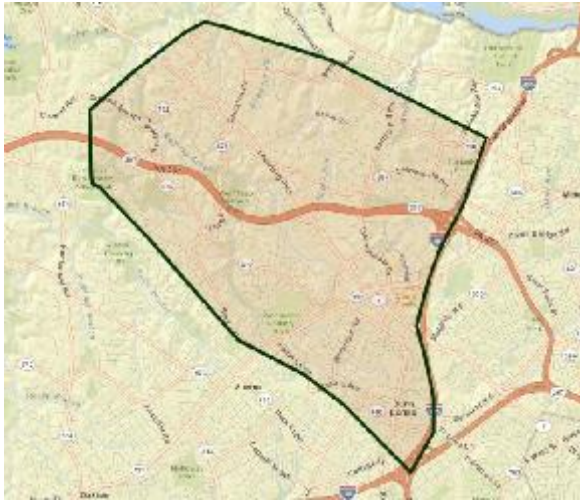
Source: U.S. Census Bureau, 2006-2010 ACS; Partners for Economic Solutions, 2013.

Subarea Profiles



The following pages provide profiles of the seven subareas' demographics.

Tysons Corner

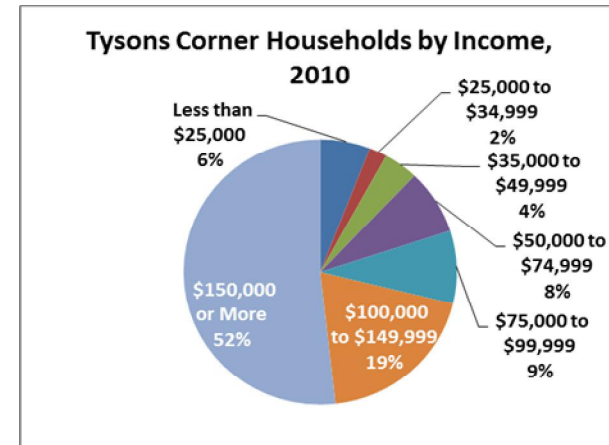
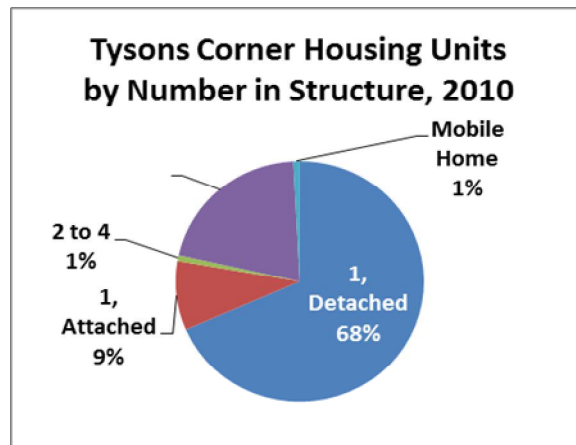
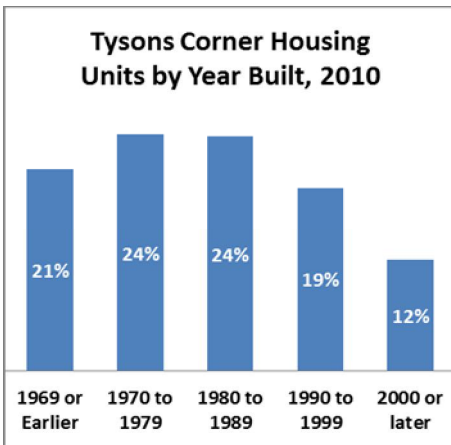


Tysons Corner

Population and Household Trends					
				2000-2010 Change	
	1990	2000	2010	Number	Percent
Population	36,400	42,831	47,421	4,590	10.7%
Households	12,758	15,965	16,647	682	4.3%

Demographics	
	2010
Median Age	42.3
Average Household Size	2.7
Households by Size	
1 Person	20.3%
2 Persons	33.3%
3-4 Persons	34.6%
5+ Persons	11.8%
Percent Owner	80.6%
Median Household Income	\$150,750

Transportation	
	2010
Average Household Vehicles	2.1
Means of Transport to Work	
Drive alone	74.2%
Carpool	8.9%
Public transit	6.0%
Walk or bike	3.2%
Work at home	7.7%



Pimmit Hills

Pimmit Hills

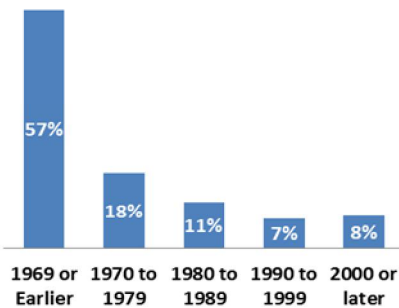


Population and Household Trends					
	1990	2000	2010	2000-2010 Change	
				Number	Percent
Population	56,183	59,044	65,551	6,507	11.0%
Households	22,820	24,420	25,030	610	2.5%

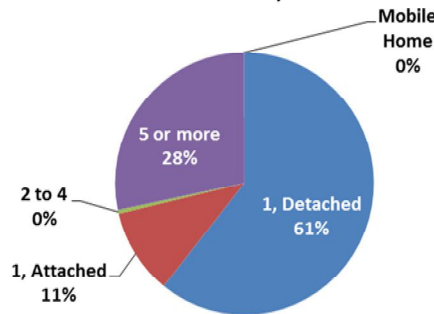
Demographics	
	2010
Median Age	38.4
Average Household Size	2.53
Households by Size	
1 Person	29.9%
2 Persons	31.6%
3-4 Persons	30.3%
5+ Persons	8.1%
Percent Owner	71.9%
Median Household Income	\$123,303

Transportation	
	2010
Average Household Vehicles	1.8
Means of Transport to Work	
Drive alone	67.7%
Carpool	8.2%
Public transit	13.6%
Walk or bike	2.8%
Work at home	7.7%

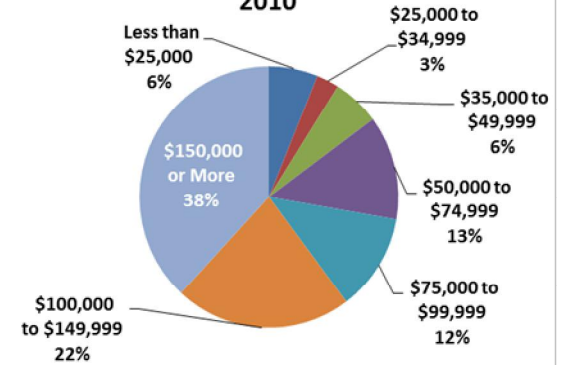
Pimmit Hills Housing Units by Year Built, 2010



Pimmit Hills Housing Units by Number in Structure, 2010



Pimmit Hills Households by Income, 2010



Falls Church/Seven Corners

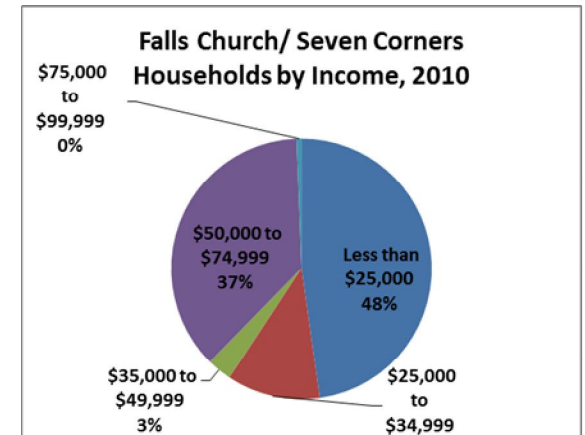
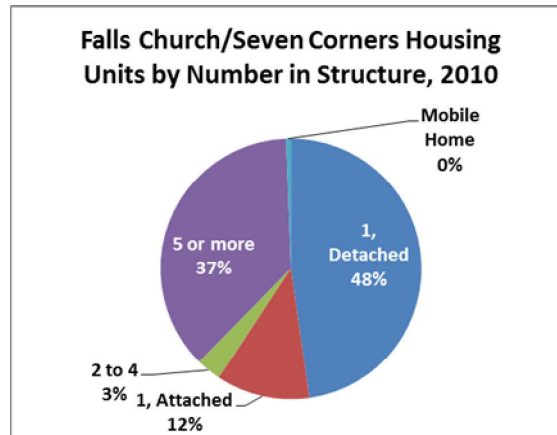
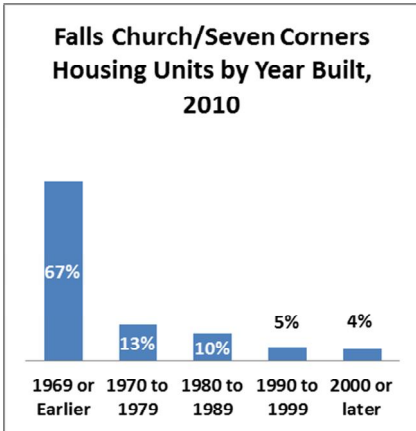
Falls Church/Seven Corners



Population and Household Trends					
	1990	2000	2010	2000-2010 Change	
				Number	Percent
Population	83,297	91,397	96,372	4,975	5.4%
Households	32,025	33,835	34,074	239	0.7%

Demographics	
	2010
Median Age	35.8
Average Household Size	2.74
Households by Size	
1 Person	28.8%
2 Persons	28.8%
3-4 Persons	33.0%
5+ Persons	9.4%
Percent Owner	60.6%
Median Household Income	\$86,983

Transportation	
	2010
Average Household Vehicles	1.7
Means of Transport to Work	
Drive alone	64.1%
Carpool	12.5%
Public transit	14.0%
Walk or bike	4.7%
Work at home	4.7%



Baileys Crossroads/Beauregard Blvd.

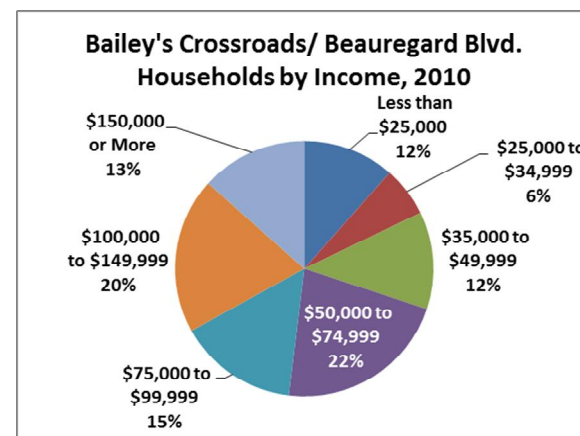
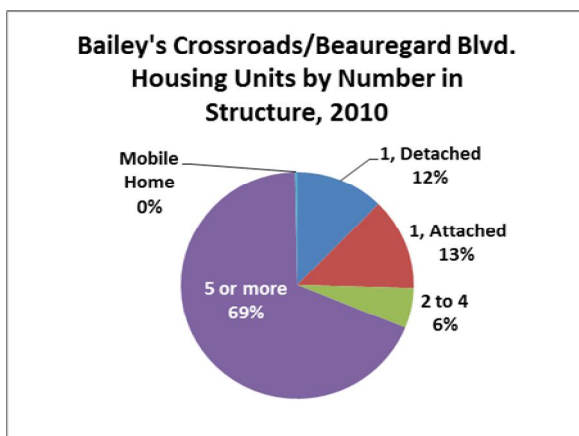
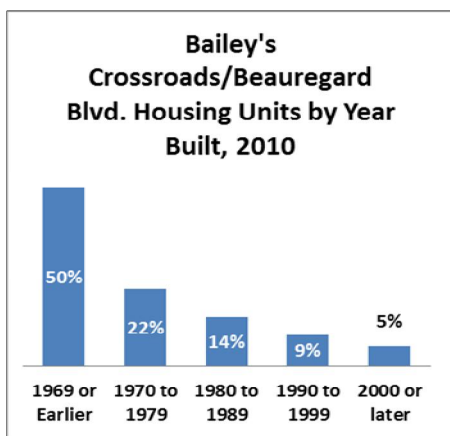
Baileys Crossroads/Beauregard Blvd.



Population and Household Trends					
	1990	2000	2010	2000-2010 Change	
				Number	Percent
Population	70,138	82,090	83,998	1,908	2.3%
Households	34,369	37,572	36,729	(843)	-2.2%

Demographics	
	2010
Median Age	34.4
Average Household Size	2.12
Households by Size	
1 Person	45.1%
2 Persons	28.6%
3-4 Persons	22.0%
5+ Persons	4.3%
Percent Owner	42.5%
Median Household Income	\$72,821

Transportation	
	2010
Average Household Vehicles	1.4
Means of Transport to Work	
Drive alone	63.9%
Carpool	9.9%
Public transit	19.3%
Walk or bike	3.9%
Work at home	3.0%



West Alexandria/Eisenhower Valley

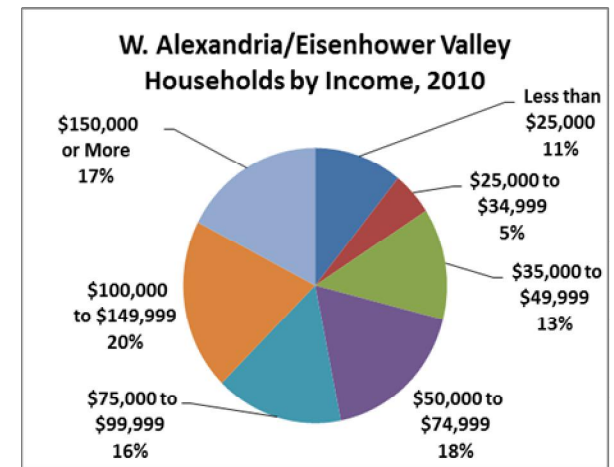
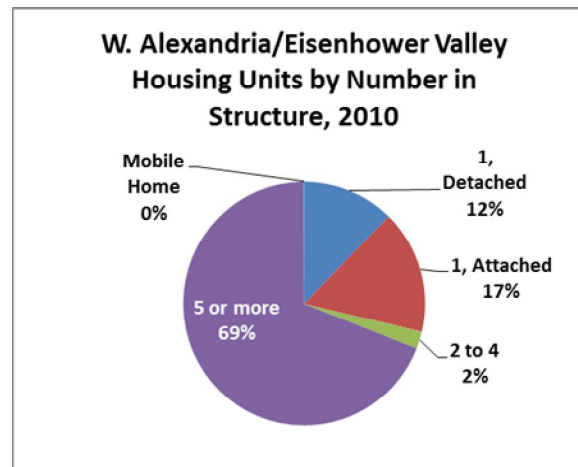
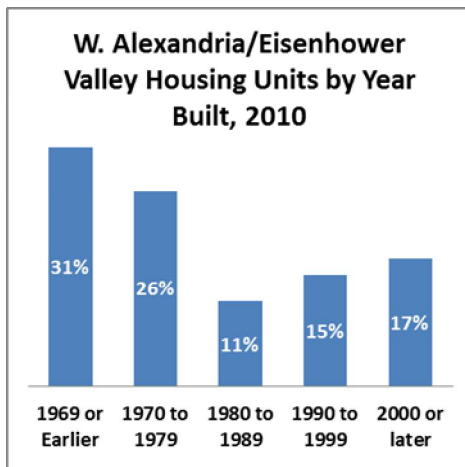
West Alexandria/ Eisenhower Valley



Population and Household Trends					
	1990	2000	2010	2000-2010 Change	
				Number	Percent
Population	26,796	33,654	40,365	6,711	19.9%
Households	12,933	16,352	40,365	24,013	146.9%

Demographics	
	2010
Median Age	35.7
Average Household Size	1.94
Households by Size	
1 Person	46.6%
2 Persons	32.1%
3-4 Persons	19.0%
5+ Persons	2.3%
Percent Owner	44.2%
Median Household Income	\$79,968

Transportation	
	2010
Average Household Vehicles	1.3
Means of Transport to Work	
Drive alone	58.7%
Carpool	8.7%
Public transit	25.0%
Walk or bike	4.4%
Work at home	3.3%



Braddock Road/Del Ray

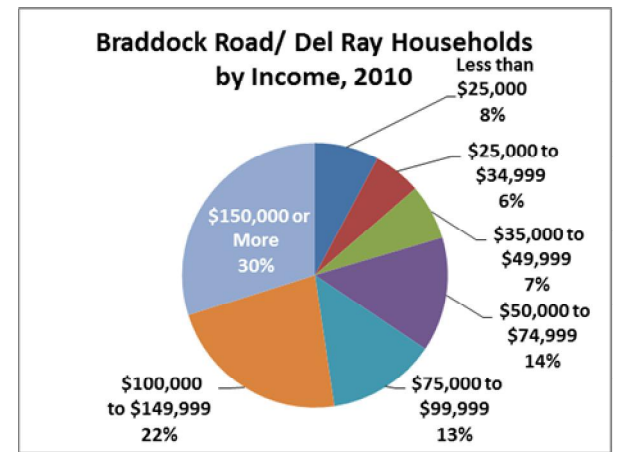
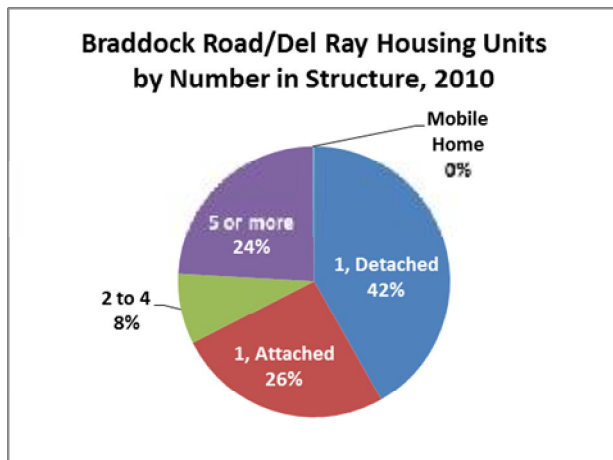
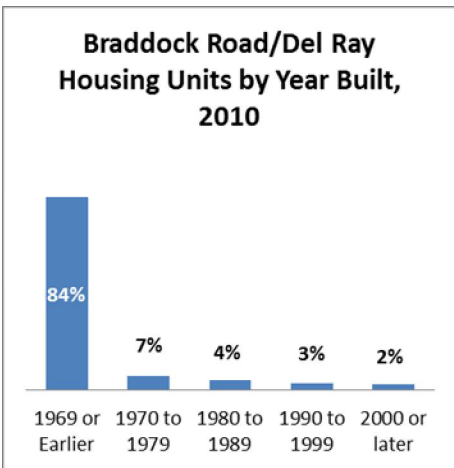
Braddock Road/Del Ray



Population and Household Trends					
	1990	2000	2010	2000-2010 Change	
				Number	Percent
Population	26,676	26,369	27,160	791	3.0%
Households	11,630	12,159	11,960	(199)	-1.6%

Demographics	
	2010
Median Age	40.2
Average Household Size	2.19
Households by Size	
1 Person	37.7%
2 Persons	34.8%
3-4 Persons	22.1%
5+ Persons	5.4%
Percent Owner	66.7%
Median Household Income	\$105,134

Transportation	
	2010
Average Household Vehicles	1.6
Means of Transport to Work	
Drive alone	65.4%
Carpool	7.8%
Public transit	16.0%
Walk or bike	5.6%
Work at home	5.1%



Old Town

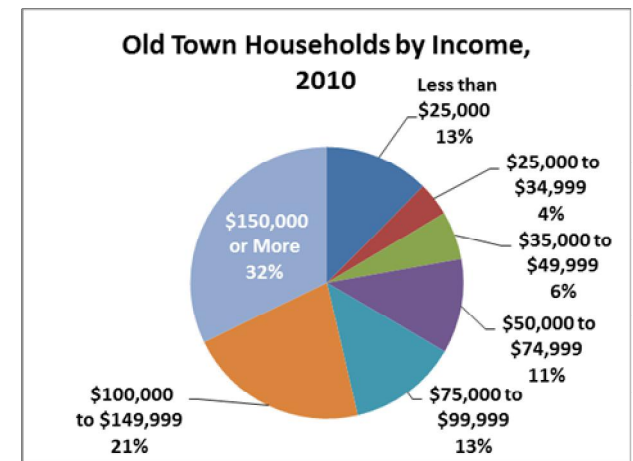
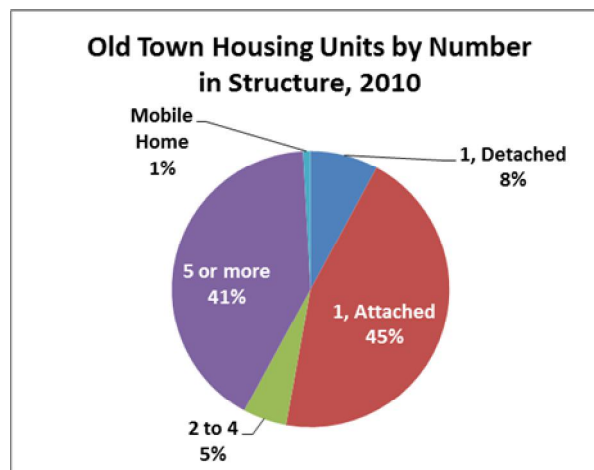
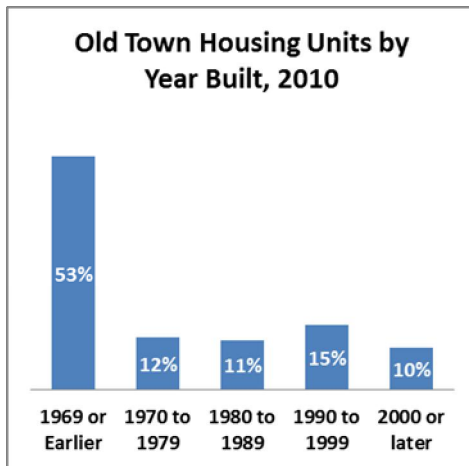
Old Town



Population and Household Trends					
	1990	2000	2010	2000-2010 Change	
				Number	Percent
Population	17,764	19,712	21,398	1,686	8.6%
Households	9,451	11,207	10,877	(330)	-2.9%

Demographics	
	2010
Median Age	40.2
Average Household Size	1.80
Households by Size	
1 Person	49.2%
2 Persons	37.1%
3-4 Persons	10.9%
5+ Persons	2.7%
Percent Owner	56.3%
Median Household Income	\$108,178

Transportation	
	2010
Average Household Vehicles	1.28
Means of Transport to Work	
Drive alone	64.1%
Carpool	12.5%
Public transit	14.0%
Walk or bike	9.6%
Work at home	6.3%



Employment Trends

Close-In Northern Virginia had an employment base of almost 875,000 jobs in 2011, as shown in Table 5. The five close-in jurisdictions experienced a 9.2-percent growth from 2002 to 2011, adding 73,400 jobs, despite the impact of the recession. Throughout Northern Virginia, total employment fell by 2.0 percent from 2008 to 2009 before rebounding 0.8 percent to 2010 and 1.8 percent from 2010 to 2011.

Table 5. Close-In Northern Virginia Employment Trends, 2002-2011

Industry Title	2002	2007	2011	2002-2011 Change	
				Number	Percent
Accommodation and Food Services	58,216	62,662	63,864	5,648	9.7%
Administrative and Support and Waste Management	55,862	57,423	55,238	-624	-1.1%
Agriculture, Forestry, Fishing, Hunting	***	***	***	***	***
Arts, Entertainment, and Recreation	13,296	14,562	14,918	1,622	12.2%
Construction	41,244	40,155	31,604	-9,640	-23.4%
Educational Services	52,331	61,336	64,549	12,218	23.3%
Finance and Insurance	30,485	32,960	30,292	-193	-0.6%
Health Care and Social Assistance	61,475	66,993	73,723	12,248	19.9%
Information	48,763	37,833	30,260	-18,503	-37.9%
Management of Companies and Enterprises	19,367	23,758	23,537	4,170	21.5%
Manufacturing	13,894	13,234	11,557	-2,337	-16.8%
Mining, Quarrying, and Oil and Gas Extraction	***	***	***	***	***
Other Services (except Public Administration)	40,495	42,528	43,334	2,839	7.0%
Professional, Scientific, and Technical Services	160,721	204,468	221,355	60,634	37.7%
Public Administration	61,448	71,262	77,804	16,356	26.6%
Real Estate and Rental and Leasing	16,756	17,111	14,977	-1,779	-10.6%
Retail Trade	77,609	78,427	74,424	-3,185	-4.1%
Transportation and Warehousing	25,213	24,269	21,867	-3,346	-13.3%
Utilities	***	***	***	***	***
Wholesale Trade	20,472	20,002	17,896	-2,576	-12.6%
Total, All Industries	801,523	872,731	874,923	73,400	9.2%

Note: Asterisks indicate non-disclosable data

Source: Covered Employment and Wages Program, Virginia Employment Commission, 2013; Partners for Economic Solutions, 2013.



The Close-In Northern Virginia employment base is dominated by professional, scientific and technical service sector jobs with one-quarter of total jobs in 2011. Public administration jobs represented another 8.9 percent of jobs. The education sector contributed 7.4 percent of the total – more than 64,500 jobs. Also important are population-serving industries – retail trade, health care, and accommodations and food service. Management companies, including company headquarters, provided 23,500 jobs in 2011. Information industry jobs fell from 6.1 percent of total jobs in 2002 to 3.5 percent in 2011 following the bursting of the dot.com bubble in the first years of the decade, as shown in Table 6. Reflecting the impact of the housing recession, construction jobs fell from 5.1 to 3.6 percent during the same time period. As a share of total jobs, the greatest growth from 2002 to 2011 was in four sectors: professional, scientific and technical services; public administration; educational services; and health care and social assistance services.

Table 6. Percent Distribution of Employment, Close-In Northern Virginia, 2002-2011

Industry Title	2002	2007	2011
Accommodation and Food Services	7.3%	7.2%	7.3%
Administrative and Support and Waste Management	7.0%	6.6%	6.3%
Agriculture, Forestry, Fishing, Hunting	***	***	***
Arts, Entertainment, and Recreation	1.7%	1.7%	1.7%
Construction	5.1%	4.6%	3.6%
Educational Services	6.5%	7.0%	7.4%
Finance and Insurance	3.8%	3.8%	3.5%
Health Care and Social Assistance	7.7%	7.7%	8.4%
Information	6.1%	4.3%	3.5%
Management of Companies and Enterprises	2.4%	2.7%	2.7%
Manufacturing	1.7%	1.5%	1.3%
Mining, Quarrying, and Oil and Gas Extraction	***	***	***
Other Services (except Public Administration)	5.1%	4.9%	5.0%
Professional, Scientific, and Technical Services	20.1%	23.4%	25.3%
Public Administration	7.7%	8.2%	8.9%
Real Estate and Rental and Leasing	2.1%	2.0%	1.7%
Retail Trade	9.7%	9.0%	8.5%
Transportation and Warehousing	3.1%	2.8%	2.5%
Utilities	***	***	***
Wholesale Trade	2.6%	2.3%	2.0%
Total, All Industries	100.0%	100.0%	100.0%
Note: Asterisks indicate non-disclosable data			
Source: Covered Employment and Wages Program, Virginia Employment Commission, 2013; Partners for Economic Solutions, 2013.			

Trends for the larger Northern Virginia¹ market are shown in Appendix Table A-6. The five close-in jurisdictions had 68.6 percent of Northern Virginia's jobs in 2011, but that proportion has been trending down from 71.6 percent in 2002 with population expansion into the outer suburbs and the I-95 corridor, as shown in Table 7.

¹ The Virginia portion of the Washington-Alexandria-Arlington Metropolitan Area includes the cities of Alexandria, Fairfax, Falls Church, Fredericksburg, Manassas and Manassas Park and the counties of Arlington, Clarke, Fairfax, Fauquier, Loudoun, Prince William, Spotsylvania, Stafford and Warren.

Table 7. Close-In Northern Virginia Employment Trends as a Share of Northern Virginia¹, 2002-2011

Industry Title	2002	2007	2011	2002-2011 Change
Accommodation and Food Services	67.9%	63.5%	62.0%	-8.6%
Administrative and Support and Waste Management	78.8%	75.6%	74.6%	-5.3%
Agriculture, Forestry, Fishing, Hunting	***	***	***	***
Arts, Entertainment, and Recreation	64.8%	63.4%	62.6%	-3.4%
Construction	53.1%	46.5%	48.0%	-9.8%
Educational Services	61.9%	59.8%	58.5%	-5.6%
Finance and Insurance	74.0%	74.0%	72.4%	-2.1%
Health Care and Social Assistance	70.2%	66.3%	63.7%	-9.3%
Information	77.6%	75.2%	73.8%	-4.9%
Management of Companies and Enterprises	87.5%	86.6%	86.6%	-1.0%
Manufacturing	47.8%	46.5%	46.1%	-3.6%
Mining, Quarrying, and Oil and Gas Extraction	***	***	***	***
Other Services (except Public Administration)	78.1%	76.2%	75.3%	-3.7%
Professional, Scientific, and Technical Services	88.8%	86.7%	86.0%	-3.2%
Public Administration	81.0%	78.9%	76.8%	-5.2%
Real Estate and Rental and Leasing	78.9%	77.0%	74.5%	-5.5%
Retail Trade	62.6%	57.1%	55.4%	-11.5%
Transportation and Warehousing	54.7%	54.3%	51.7%	-5.4%
Utilities	***	***	***	***
Wholesale Trade	66.8%	63.8%	63.4%	-5.1%
Total, All Industries	71.6%	69.1%	68.6%	-4.2%

Note: Asterisks indicate non-disclosable data

¹ The Northern Virginia portion of the Washington-Alexandria-Arlington Metropolitan Division includes the cities of Alexandria, Fairfax, Falls Church, Fredericksburg, Manassas and Manassas Park and the counties of Arlington, Clarke, Fairfax, Fauquier, Loudoun, Prince William, Spotsylvania, Stafford and Warren.

Source: Covered Employment and Wages Program, Virginia Employment Commission, 2013; Partners for Economic Solutions, 2013.

The shifts to the outer suburbs have been greatest among sectors that follow residents – retail trade, construction and health care. The close-in jurisdictions continue to dominate in management of companies and professional, technical and scientific services.

Growth Projections, 2010-2040

The Metropolitan Washington Council of Governments (MWCOG) prepares cooperative forecasts for population, households and employment to serve as a common basis for regional planning. Table 8 presents the MWCOG employment forecasts for the Route 7 corridor and submarkets to 2040 from Round 8.2. The small area forecasts are based on regional forecasts prepared in 2012. These forecasts indicate sustained growth in the corridor with Tysons Corner continuing to capture the greatest share (37 percent) of Northern Virginia employment growth. Significant creation of jobs also is forecast for the Pimmit Hills, Baileys Crossroads/Beauregard Boulevard and West Alexandria/Eisenhower Valley subareas with each area gaining between 21,000 and 22,000 jobs by 2040. No employment growth is anticipated in the Braddock Road/Del Ray subarea, reflecting its predominantly residential development pattern. The corridor area as a whole is forecast to add 132,600 jobs, increasing the employment base by almost 48 percent by 2040.

Table 8. Route 7 Corridor Employment Projections						
	2010	2020	2030	2040	2010-2040 Change	
					Number	Percent
Subarea						
Tysons Corner	83,803	98,728	121,792	132,548	48,745	58.2%
Pimmit Hills	30,789	37,007	45,939	52,561	21,772	70.7%
Falls Church/ Seven Corners	39,877	45,582	50,191	51,678	11,801	29.6%
Baileys Crossroads/ Beauregard Blvd.	39,620	48,209	57,729	61,308	21,688	54.7%
West Alexandria/ Eisenhower Valley	35,143	41,201	48,738	56,365	21,222	60.4%
Braddock Road/ Del Ray	6,983	7,033	7,111	6,831	(152)	-2.2%
Old Town	41,776	44,055	47,613	49,335	7,559	18.1%
Total	277,991	321,815	379,113	410,626	132,635	47.7%

Source: Metropolitan Washington Council of Governments, 2012; Partners for Economic Solutions, 2013.

The continuing Congressional efforts to reduce the size of the Federal Government's deficit and particularly the recent sequestration of both defense and domestic programs are changing the region's growth trajectory, at least in the short run. Over the longer term to 2040, it is difficult to say what may happen.

On the population side, the corridor is forecast to grow 26 percent to 2040 with the addition of more than 97,000 new residents and 46,300 new households. The new population is spread more widely than the new jobs. Three areas – Tysons Corner, Falls Church/Seven Corners and Baileys Crossroads/ Beauregard Boulevard – are each forecast to add roughly



18,000 new residents. West Alexandria/Eisenhower Valley and Old Town also are forecast to add 16,400 and 14,800 residents, respectively.

Table 9. Route 7 Corridor Population Projections						
	2010	2020	2030	2040	2010-2040 Change	
					Number	Percent
Subarea						
Tysons Corner	44,340	52,970	59,106	62,557	18,217	41.1%
Pimmit Hills	64,105	68,760	72,019	73,977	9,872	15.4%
Falls Church/ Seven Corners	97,509	104,469	112,099	115,525	18,016	18.5%
Baileys Crossroads/ Beauregard Blvd.	88,257	94,947	102,120	106,442	18,185	20.6%
West Alexandria/ Eisenhower Valley	35,882	41,036	44,648	52,247	16,365	45.6%
Braddock Road/Del Ray	27,404	28,428	28,690	29,498	2,094	7.6%
Old Town	20,545	25,996	31,532	35,356	14,811	72.1%
Total	378,042	416,606	450,214	475,602	97,560	25.8%

Source: Metropolitan Washington Council of Governments, 2012; Partners for Economic Solutions, 2013.

III. Development Trends and Potentials

This section discusses existing conditions, trends and potentials by type of development – office, residential, retail and hotel uses.

Office Development

Northern Virginia is a major force in the regional office market with over 178 million square feet of space.

Northern Virginia Market Trends

As shown in Table 10, the Northern Virginia market has added 2.4 million square feet of space from just under 156 million square feet at the end of 2003. Absorption of space was very high from 2004 through 2006, filling 16.5 million square feet of space, allowing the vacancy rate to fall from 14.3 percent at the end of 2003 to 9.4 percent at the end of 2006. Office construction then boomed from 2006 through 2008, adding almost 12 million square feet of space in three years. With the recession, absorption slowed dramatically to only 80,500 square feet in 2009. Over the last two years, the market has lost 2.6 million square feet of occupancy with a corresponding rise in the vacancy rate to 15.9 percent at the end of 2012.

Table 10 . Northern Virginia Office Occupancy and Absorption Trends, 2003-2012

Year End	Existing Inventory	Delivered Inventory	Occupied Square Feet	Net Absorption	Total Vacancy Rate	Average Direct Rent
2003	155,905,583	NA	133,592,732	NA	14.3%	\$26.11
2004	159,522,725	3,617,142	140,060,294	6,467,562	12.2%	\$27.58
2005	161,331,217	1,808,492	145,959,922	5,899,628	9.5%	\$29.75
2006	165,598,681	3,587,464	150,076,079	4,116,157	9.4%	\$30.78
2007	169,190,439	3,591,758	151,312,527	1,236,448	10.6%	\$32.25
2008	173,879,085	4,688,646	151,815,811	503,284	12.7%	\$31.73
2009	175,243,807	1,204,722	151,896,306	80,495	13.3%	\$29.94
2010	176,535,271	1,291,464	152,528,439	632,133	13.6%	\$30.42
2011	177,458,185	922,914	151,811,104	(717,335)	14.5%	\$31.55
2012	178,307,979	849,794	149,891,018	(1,920,086)	15.9%	\$31.92

Source: CoStar, 2013; Partners for Economic Solutions, 2013.



Part of the decline was the result of the Federal Government vacating private office buildings in response to the 2005 recommendations of the Base Realignment and Closure Commission. Multiple buildings were found not to meet force protection standards, leading the Defense Department to relocate commands to government-owned buildings at Fort Belvoir, Fort Meade in Maryland and many other locations.

Route 7 Corridor

The Route 7 corridor's experience mirrored that of Northern Virginia as a whole. Shown on the following map, the geographic submarkets used to approximate the Route 7 corridor market include: Tysons Corner; Falls Church; I-395 Corridor; Eisenhower Avenue Corridor; and Old Town Alexandria. These submarkets extend beyond the study area boundaries, but they provide a good indication of market conditions in the corridor.

New office space construction totaled 5.7 million square feet over the last 10 years while absorption totaled 3.1 million square feet, as shown in Table 11. Through 2007 absorption had outstripped new construction and vacancies fell from 14.1 percent in 2003 to 9.6 percent at the end of 2007. From 2008 through 2012, the corridor lost office tenancy with the base of occupied square feet declining by 2.4 million square feet and 4.9 percent.

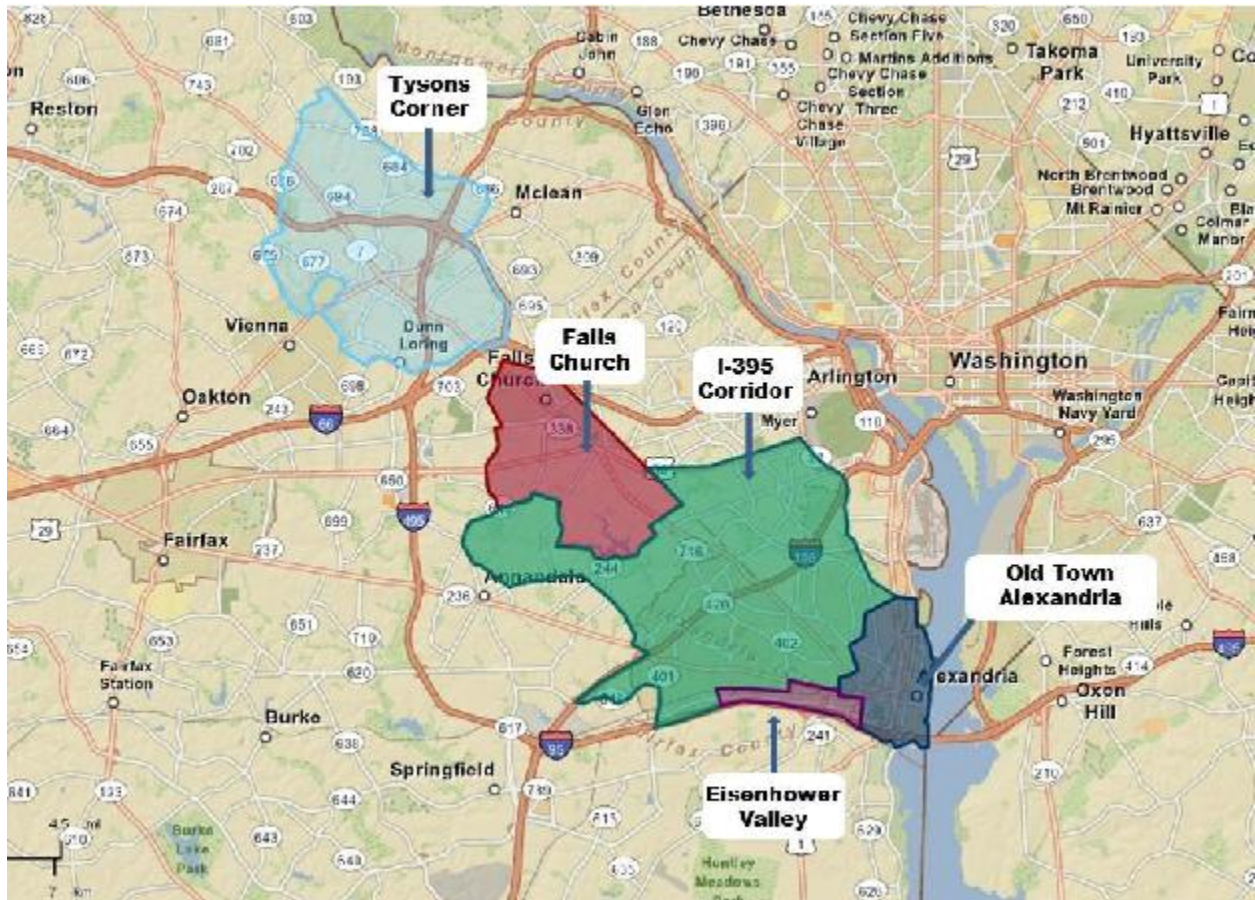
Table 11. Route 7 Corridor Office Occupancy and Absorption Trends, 2003-2012

Year End	Existing Inventory	Delivered Inventory	Occupied Square Feet	Net Absorption	Total Vacancy Rate	Average Direct Rent
2003	51,636,133	408,142	44,354,605	NA	14.1%	\$25.28
2004	53,852,399	2,216,266	47,101,000	2,746,395	12.5%	\$25.56
2005	54,257,174	404,775	48,976,687	1,875,687	9.7%	\$27.74
2006	54,987,302	730,128	49,694,211	717,524	9.6%	\$30.05
2007	55,013,237	25,935	49,710,705	16,494	9.6%	\$31.43
2008	56,326,308	1,358,071	49,894,968	184,263	11.4%	\$31.44
2009	56,766,524	440,216	49,290,063	(604,905)	13.2%	\$29.41
2010	56,880,721	114,197	49,008,141	(281,922)	13.8%	\$29.96
2011	56,880,721	-	48,151,223	(856,918)	15.3%	\$31.00
2012	56,913,721	33,000	47,449,637	(701,586)	16.6%	\$30.82

Note: Route 7 Corridor statistics include buildings in five submarkets: Tysons Corner; Falls Church; I-395 Corridor; Eisenhower Avenue Corridor; and Old Town Alexandria.

Source: CoStar, 2013; Partners for Economic Solutions, 2013.

Office Submarkets Encompassing Route 7 Corridor



Source: CoStar, 2013.

Development Potentials

By 2040, the MWCOG forecasts anticipate the addition of 133,000 new jobs in the corridor. Assuming that 75 percent of those jobs will be accommodated in office space (with a typical 5.0-percent vacancy rate) would suggest the need for an additional 18.9 million square feet of office space at an average of 180 square feet per employee. Of that total, 3.8 million could be accommodated in existing vacant space to bring the corridor into a general supply/demand balance with 10-percent vacancies. Replacement of 5 percent of the existing office inventory would require construction of an additional 2.8 million square feet of space over the 2010-2040 time period. Together, office space constructed to meet new demand and replacement of obsolete space would total 17.9 million square feet by 2040. Enhanced transit service in the corridor could influence some location decisions and increase the demand for corridor office space.

Residential Development

Close-In Northern Virginia Market Trends

The region's steady population growth has translated into pressure on the housing market that led to both active development and price/rent escalations. The unsustainable price increases rolled back somewhat following the bursting of the housing bubble. With the tightening of credit markets and higher standards for mortgage lending, the balance between ownership and rental housing has shifted back to favor rental housing more than in the past. The region is seeing high production levels of rental housing.

As the close-in jurisdictions are largely built out, much of the region's new ownership housing has been developed in jurisdictions further out from Washington – Prince William, Loudoun, Stafford, Spotsylvania and Fauquier counties. This is particularly true for lower-cost housing for young families and others who need affordable housing. However, the high cost of commuting from these jurisdictions has changed that calculus, burdening families with unsupportable combined costs of housing and transportation. The housing recession and resulting mortgage defaults and foreclosures hit the outer suburbs much harder than the inner suburbs.

In the close-in jurisdictions, more of the development activity has been focused on infill opportunities, particularly near Metro stations. Where sites are available, new large developments are being developed with mixed uses and an emphasis on walkability. The Rosslyn-Ballston corridor has been very successful at attracting new private investment in housing within walking distance of the Metro. New developments are replacing older outmoded shopping centers in Alexandria and Springfield with successful retail centers also adding housing to capitalize on the demand for housing in mixed-use neighborhoods.

The demographic shifts discussed in Section II are reinforcing the push for more housing in Northern Virginia's close-in suburbs and urbanized areas. As Millennials or Generation Y form their own households, many place a high value on transit accessibility, the ability to live without owning a car and avoiding the time and delays associated with commuting. Many have shown a willingness to accept smaller rental apartments and/or roommates in order to live in an urban, mixed-use, walkable community. As more young people delay or forego childbearing, issues of school quality do not carry the same weight in their location choices that they did in their parents' choices to live in suburban single-family neighborhoods.

The Rosslyn-Ballston corridor has been exceptionally successful in attracting young professionals and empty nesters to take advantage of both the high accessibility provided



by five Metro stations and the urban ambiance created by the higher-density mixed-use neighborhoods that have emerged around each station.

Route 7 Corridor

Census data indicate that the Route 7 corridor had an inventory of 169,200 housing units as of 2010, of which somewhat more than half were built prior to 1970. The median year built is estimated at 1968, but it ranges from 1955 in the Braddock/Del Ray submarket to 1979 in the Tysons Corner submarket. Housing built since 2000 represents 7.7 percent of all corridor units. Within West Alexandria/Eisenhower Valley, housing built since 2000 reaches 16.8 percent of all housing. In Tysons Corner, 11.5 percent of housing was built since 2000 with 9.6 percent newer units in the Old Town submarket.

	Tysons Corner		Pimmit Hills		Falls Church/ Seven Corners		Baileys Crossroads/ Beauregard Blvd.	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Year Built								
2005 or later	349	1.9%	756	2.8%	572	1.6%	906	2.2%
2000 to 2004	1,730	9.6%	1,272	4.8%	1,069	2.9%	1,381	3.3%
1990 to 1999	3,421	19.0%	1,857	7.0%	1,885	5.2%	3,625	8.7%
1980 to 1989	4,364	24.2%	2,917	11.0%	3,661	10.0%	5,772	13.8%
1970 to 1979	4,402	24.4%	4,738	17.8%	4,852	13.3%	9,033	21.7%
1969 or Earlier	3,771	20.9%	15,051	56.6%	24,531	67.1%	20,985	50.3%
Total	18,037	100.0%	26,591	100.0%	36,570	100.0%	41,702	100.0%
Median Year Built	1979		1965		1961		1966	
	West Alexandria/ Eisenhower Valley		Braddock Road/ Del Ray		Old Town		Route 7 Corridor	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Year Built								
2005 or later	962	4.5%	109	0.9%	579	4.7%	4,233	2.5%
2000 to 2004	2,607	12.3%	194	1.5%	612	4.9%	8,865	5.2%
1990 to 1999	3,112	14.7%	391	3.1%	1,815	14.6%	16,106	9.5%
1980 to 1989	2,371	11.2%	513	4.0%	1,380	11.1%	20,978	12.4%
1970 to 1979	5,468	25.8%	842	6.6%	1,484	12.0%	30,819	18.2%
1969 or Earlier	6,659	31.4%	10,682	83.9%	6,525	52.6%	88,204	52.1%
Total	21,179	100.0%	12,731	100.0%	12,395	100.0%	169,205	100.0%
Median Year Built	1975		1955		1968		1968	

Source: U.S. Census Bureau, 2006-2010 ACS; Partners for Economic Solutions, 2013.

Just over one-half of units are single-family detached or attached units. Forty-five percent of units are in structures with five or more units. The balance between single-family and multi-family housing varies significantly across the corridor. The single-family share of the inventory in Tysons Corner, Pimmit Hills and Braddock Road/Beauregard Blvd. submarkets range from 68 to 78 percent. The Bailey's Crossroads/Beauregard Boulevard and West Alexandria/Eisenhower Valley submarkets have multi-family (in structures of five units or more) housing that represents 69 percent of their inventories. The Old Town submarket comes closest to an equal balance between single- and multi-family housing.

Table 13. Housing Units by Number of Units in Structure, 2010

	Tysons Corner		Pimmit Hills		Falls Church/ Seven Corners		Baileys Crossroads/ Beaugard Blvd.	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Units in Structure								
1, Detached (Single Family)	12,352	68.5%	16,150	60.7%	17,461	47.7%	5,105	12.2%
1, Attached (Townhouse)	1,672	9.3%	2,796	10.5%	4,245	11.6%	5,509	13.2%
2 (Duplex)	33	0.2%	45	0.2%	235	0.6%	519	1.2%
3 to 4	107	0.6%	79	0.3%	890	2.4%	1,840	4.4%
5 to 19	959	5.3%	3,670	13.8%	6,861	18.8%	10,755	25.8%
20 or more	2,764	15.3%	3,843	14.5%	6,658	18.2%	17,843	42.8%
Mobile Home	150	0.8%	8	0.0%	220	0.6%	131	0.3%
Other	-	0.0%	-	0.0%	-	0.0%	-	0.0%
Total	18,037	100.0%	26,591	100.0%	36,570	100.0%	41,702	100.0%
	West Alexandria/ Eisenhower Valley		Braddock Road/ Del Ray		Old Town		Route 7 Corridor	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Units in Structure								
1, Detached (Single Family)	2,605	12.3%	5,316	41.8%	979	7.9%	59,968	35.4%
1, Attached (Townhouse)	3,479	16.4%	3,279	25.8%	5,570	44.9%	26,550	15.7%
2 (Duplex)	223	1.1%	317	2.5%	177	1.4%	1,549	0.9%
3 to 4	258	1.2%	749	5.9%	457	3.7%	4,380	2.6%
5 to 19	4,783	22.6%	1,612	12.7%	1,565	12.6%	30,205	17.9%
20 or more	9,814	46.3%	1,444	11.3%	3,539	28.6%	45,905	27.1%
Mobile Home	17	0.1%	14	0.1%	108	0.9%	648	0.4%
Other	-	0.0%	-	0.0%	-	0.0%	-	0.0%
Total	21,179	100.0%	12,731	100.0%	12,395	100.0%	169,205	100.0%

Source: U.S. Census Bureau, 2006-2010 ACS; Partners for Economic Solutions, 2013.

Rental Apartments

Reis, Inc. provides trend data for apartments in the region. Four subareas capture most of the activity of the Route 7 corridor: Tysons Corner/Fairfax City; Falls Church/Annandale; Seminary Road/Landmark; and Old Town with 53,000 apartment units. Table 14 presents apartment trends for 2008 through 2012. New construction added 3,600 apartments over the last five years, presenting five percent of the subareas' inventory of rental apartments. During that same period, a total of 4,868 apartments were absorbed (the increase in the number of occupied units from the end of 2007 through the end of 2012). The fact that absorption outpaced construction by a ratio of 1.35 indicates the strength of demand and explains the rapid increases in rents experienced during the period. Vacancy rates are down as low as 1.8 percent in the Seminary Road/Landmark submarket and 3.1 percent in the Falls Church/Annandale submarket. In the Tysons Corner and Old Town submarkets, which added many units over the last five years, vacancy rates are higher at 6.6 and 7.0 percent, respectively.

Table 14. Route 7 Corridor Apartment Trends

	Tysons Corner/ Fairfax City	Falls Church/ Annandale	Seminary Road/ Landmark	Old Town
Inventory of Units	13,135	13,061	21,055	5,719
Vacancy Rate	6.6%	3.1%	1.8%	7.0%
Rents				
Asking Rent				
Mean, 2012	\$1,690	\$1,525	\$1,465	\$1,702
Median, 2012	\$1,636	\$1,545	\$1,407	\$1,752
Asking Rent by Year Built				
Before 1970	\$1,590	\$1,444	\$1,414	\$1,295
1970-1979	\$1,548	\$1,596	\$1,487	NA
1980-1989	\$1,767	NA	\$1,451	NA
1990-1999	\$1,723	NA	\$1,564	\$1,791
2000-2009	\$2,064	\$2,210	\$1,739	\$1,924
After 2009	\$1,978	NA	NA	\$2,382
Annualized Rent Growth				
Last 1 Year	4.4%	2.2%	3.0%	2.5%
Last 3 Years	4.2%	3.4%	2.3%	2.9%
Last 5 Years	3.1%	2.9%	1.9%	2.2%
Unit Construction and Absorption				
Units Built				
Last 1 Year	874	-	-	550
Last 3 Years	1,594	-	-	830
Last 5 Years	2,221	414	136	830
Units Absorbed				
Last 1 Year	716	65	189	403
Last 3 Years	1,373	300	737	723
Last 5 Years	1,714	654	1,263	1,237

Source: Reis, Inc.; Partners for Economic Solutions, 2013.

Over the last five years, rents in the submarkets increased at an average rate of 1.9 to 3.1 percent annually. Mean monthly asking rents range from \$1,465 in Seminary Road/Landmark to \$1,702 in the Old Town submarket. Rents depend greatly on the age of the units. Mean rents for units built before 1970 are 19 to 35 percent lower than for those built from 2000 to 2009. Older units in the Old Town, Seminary Road/Landmark and Falls Church/Annandale submarkets offer much greater affordability than do newly built units. The relative affordability offered by older apartment complexes is gradually being lost to redevelopment and to renovation/repositioning.



Table __ summarizes asking rents by unit size and submarket. One-bedroom units rent for \$1,344 to \$1,531 per month while two-bedroom unit rents range from \$1,642 to \$1,975 per month. On a square-foot basis, rents for one- and two-bedroom units run from \$1.53 to \$2.08 per square foot.

Table 15. Route 7 Corridor Apartment Rents				
	Tysons Corner	Falls Church/ Annandale	Seminary Road/ Landmark	Old Town
Average Monthly Rent				
Studio/Efficiency	\$1,250	\$1,135	\$993	\$1,187
One Bedroom	\$1,507	\$1,349	\$1,344	\$1,531
Two Bedrooms	\$1,794	\$1,620	\$1,642	\$1,975
Three Bedrooms	\$2,094	\$2,055	\$1,924	\$2,726
Average Size (Sq. Ft.)				
Studio/Efficiency	583	561	481	501
One Bedroom	796	810	748	736
Two Bedrooms	1,052	1,004	1,072	1,128
Three Bedrooms	1,279	1,284	1,264	1,421
Average Rent per Sq. Ft.				
Studio/Efficiency	\$2.14	\$2.02	\$2.06	\$2.37
One Bedroom	\$1.89	\$1.67	\$1.80	\$2.08
Two Bedrooms	\$1.71	\$1.61	\$1.53	\$1.75
Three Bedrooms	\$1.64	\$1.60	\$1.52	\$1.92
Source: Reis, Inc.; Partners for Economic Solutions, 2013.				

For-Sale Housing

The value that the market gives to housing close to the Tysons Corner, Alexandria, Arlington and District of Columbia employment centers is evident in the high prices paid over the last six months. Table 16 summarizes data provided by Redfin.com on recent home sales in the zip codes that contain the Route 7 corridor. In several cases, those zip codes capture housing beyond the study area boundaries, but the results are still informative.

Average sales prices for single-family detached houses by subarea range from \$585,000 in the Baileys Crossroads/Beauregard Boulevard submarket up to \$833,500 in the Pimmit Hills subarea. On the basis of price per square foot, Old Town achieved the highest prices with an average price of \$445 per square foot. As would be expected, townhouse pricing follows a similar pattern of variation among subareas. Sales prices from \$408,500 to \$736,500 represent sales per square foot of \$227 to \$331.



Among condominium sales, the price range is greater, starting at \$116,500 in Baileys Crossroads/Beauregard Boulevard and reaching \$457,900 in Old Town. Condominium prices per square foot ranged from \$183 to \$416.

Table 16. Route 7 Corridor Residential Sales Within the Last Six Months							
	Tysons Corner	Pimmit Hills	Falls Church/Seven Corners	Baileys Crossroads/Beauregard Blvd.	West Alexandria/Eisenhower Valley	Braddock Road/ Del Ray	Old Town
Single-Family Detached House Sales							
Median Sale Price	\$750,000	\$833,500	\$655,000	\$585,000	\$760,000	\$557,500	\$750,000
Average Sale Price	\$810,500	\$811,938	\$687,000	\$629,750	\$733,557	\$580,188	\$801,661
Avg. Square Feet	3,265	2,060	2,032	3,040	2,883	1,680	1,800
Avg. Price per SF	\$248	\$394	\$338	\$207	\$254	\$345	\$445
Townhouse Sales							
Median Sale Price	\$596,000	\$736,500	\$445,000	\$408,500	\$511,000	\$445,750	\$580,000
Average Sale Price	\$590,964	\$830,825	\$454,111	\$431,750	\$501,714	\$443,806	\$705,729
Avg. Square Feet	1,913	2,513	1,722	1,780	2,211	1,463	2,319
Avg. Price per SF	\$309	\$331	\$264	\$243	\$227	\$303	\$304
Condominium Sales							
Median Sale Price	\$306,000	\$396,000	\$198,500	\$116,500	\$170,000	\$268,450	\$457,900
Average Sale Price	\$350,250	\$421,500	\$223,222	\$183,788	\$219,500	\$305,873	\$427,957
Avg. Square Feet	1,170	1,098	1,217	861	1,200	1,052	1,028
Avg. Price per SF	\$299	\$384	\$183	\$213	\$183	\$291	\$416

Source: Redfin.com; Partners for Economic Solutions, 2013.

Development Potentials

Pipeline projects in the corridor include a variety of multi-family developments as developers seek to redevelop and intensify commercial developments with new housing. Major new multi-family developments are proposed for several sites in the Tysons Corner area with the introduction of Metro Silver Line service in late 2013 and the adoption of a new plan that seeks to create walkable mixed-use developments for a more sustainable future for the area, one less dependent on auto traffic and less constrained by the area's massive congestion delays. The Landmark shopping center site will incorporate major new housing and the Beauregard Boulevard corridor is envisioned for major residential redevelopment at significantly higher densities than now exist.

The MWCOG projections anticipate the net addition of 46,300 new households by 2040. Accommodating those households with a 3.0-percent vacancy rate and replacing one percent of existing housing during that period would require construction of 49,200 new housing units by 2040. The corridor's construction patterns of the last decade and the



proposed developments suggest that 75 percent of that new housing will be developed in multi-family structures.

Retail/Service Development

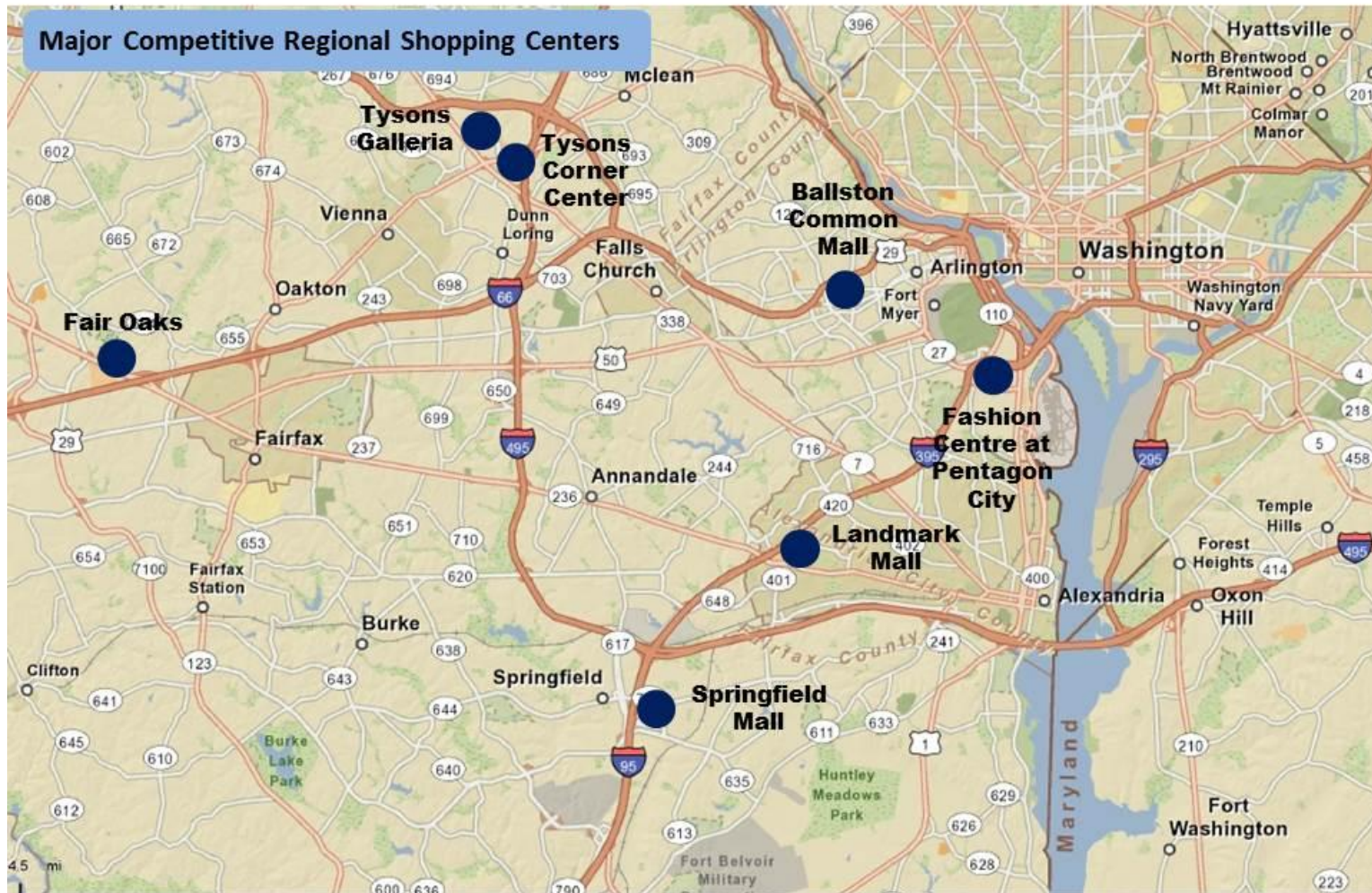
Retail and service development patterns operate on both the regional and local level. The Route 7 corridor competes within the larger Northern Virginia market and within several local submarkets. Retail space breaks down into three main categories:

- shoppers goods (general merchandise, apparel, furniture and furnishings and other goods) for which shoppers like to compare offerings from many stores;
- neighborhood goods and services, primarily grocery stores, drugstores, food stores and service establishments, serve local residents within a 5- to 10-minute drive; and
- food and beverage restaurants, bars and fast food establishments.

Major Competitive Centers/Clusters

Shoppers goods are sold most often in regional shopping centers, which offer a wide variety of stores and choices and attract customers from a large market area. The competitive regional retail is focused within major regional shopping centers and their environs. Most of the region's major malls are surrounded by big box and other retailers that also serve the regional market, taking advantage of the customer traffic generated by the malls. Within the Close-In Northern Virginia market, seven regional shopping centers form the primary clusters of competition:

- Tysons Corner Center, the metropolitan area's largest super-regional center, includes 2.2 million square feet of space and more than 300 retailers. The center is anchored by Nordstrom, Bloomingdale's, Lord & Taylor, Macy's and L.L. Bean. The Macerich Company is planning a major intensification of the mall site with the addition of 3.5 million square feet of residential and office space and a hotel.
- Tysons Galleria, across Route 123 from Tysons Corner Center, focuses on high-end fashion retailers, including Neiman Marcus and Saks Fifth Avenue. It has a total of 800,000 square feet and more than 120 retailers.
- Ballston Common Mall, a mid-market mall on Wilson Boulevard with 580,000 square feet of space on four floors anchored by Macy's and the Kettler Capitals IcePlex, has faced growing competition since its opening in 1986. Forest City Enterprises now plans to reposition the mall emphasizing restaurants and entertainment uses and adding more than 300 apartments and three levels of office space.





- Fashion Centre at Pentagon City, anchored by Nordstrom and Macy's, offers 990,000 square feet of fashion and related retail space. Simon Property Group is planning a major upgrade to the center to add residential units or office space and update the retail mix.
- Fair Oaks, a 1.6 million square-foot mall at the I-66 / U.S. 50 interchange developed in 1980, is anchored by Macy's, J.C. Penney, Sears and Lord & Taylor.
- Springfield Mall, a 1.4 million square-foot troubled mall anchored by Macy's, Target and J.C. Penney, is closing. Vornado will redevelop the mall as Springfield Town Center with retail uses, 2,000 residential uses and a 225-room hotel while retaining the three anchors.
- Landmark Mall on I-395 at Duke Street also is planned for redevelopment by its owner, Howard Hughes Corporation. It is an aging mall anchored by Sears and Macy's that has found it hard to compete with larger and newer centers.

Route 7 Corridor

The Route 7 corridor study area includes three of the seven regional centers: Tysons Corner Center; Tysons Galleria; and Landmark Mall. Seven Corners Center, Northern Virginia's first major shopping center, has been rebuilt as a power center, hosting big box retailers such as Sym's, Shoppers Food Warehouse, Home Depot and Ross Dress for Less. Sears has a freestanding store across Leesburg Pike.

Several additional small centers, typically anchored by grocery stores, line Route 7. These centers serve residents' needs for neighborhood goods and services. Some, such as Falls Church's Eden Center, focus specifically on serving the Asian or other many different ethnic groups living in the corridor. Older strip centers offer space at lower rents, creating opportunities for local entrepreneurs.

Old Town and other restaurant clusters serve both residents and tourists.

Retail analysis compares the spending of local area residents to the actual sales of retailers located in the area. The following table provides that comparison for each of the seven subareas. The first column measures demand in terms of the annual spending of area households. The second column estimates sales by local retailers. The difference shown in the third column shows outflow or inflow of dollars from beyond the area. A positive retail gap indicates that there is more spending potential than the retailers are capturing, so there may be more room in the market for an additional store. A negative number indicates that residents from outside the area are patronizing the area's retailers, bringing in outside dollars.

Table 17. Retail Areas' Residents' Neighborhood Goods and Eating and Drinking Expenditure Potential, Estimated Retail Sales and Leakage/Surplus, 2010

Store Type	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap ¹
Tysons Corner Subarea			
Food & Beverage Stores			
Grocery Stores	\$188,344,865	\$71,299,639	\$117,045,226
Specialty Food Stores	\$1,672,755	\$2,960,976	-\$1,288,221
Beer, Wine & Liquor Stores	\$7,607,958	\$3,038,074	\$4,569,884
Health & Personal Care Stores	\$33,661,833	\$40,910,337	-\$7,248,504
Food Services & Drinking Places			
Full-Service Restaurants	\$85,526,001	\$163,509,499	-\$77,983,498
Limited-Service Eating Places	\$72,321,758	\$103,090,160	-\$30,768,402
Pimmit Hills Subarea			
Food & Beverage Stores			
Grocery Stores	\$191,403,498	\$128,997,913	\$62,405,585
Specialty Food Stores	\$1,608,236	\$4,581,935	-\$2,973,699
Beer, Wine & Liquor Stores	\$8,454,677	\$2,514,173	\$5,940,504
Health & Personal Care Stores	\$34,520,349	\$13,004,466	\$21,515,883
Food Services & Drinking Places			
Full-Service Restaurants	\$95,812,656	\$33,153,370	\$62,659,286
Limited-Service Eating Places	\$71,927,816	\$13,568,680	\$58,359,136
Falls Church/Seven Corners Subarea			
Food & Beverage Stores			
Grocery Stores	\$189,673,093	\$170,182,000	\$19,491,093
Specialty Food Stores	\$1,985,703	\$645,485	\$1,340,218
Beer, Wine & Liquor Stores	\$9,873,250	\$2,612,438	\$7,260,812
Health & Personal Care Stores	\$42,068,032	\$31,723,217	\$10,344,815
Food Services & Drinking Places			
Full-Service Restaurants	\$105,650,439	\$96,598,175	\$9,052,264
Limited-Service Eating Places	\$73,086,546	\$68,798,569	\$4,287,977
Baileys Crossroads/ Beaugard Blvd. Subarea			
Food & Beverage Stores			
Grocery Stores	\$175,863,743	\$110,544,415	\$65,319,328
Specialty Food Stores	\$1,347,590	\$0	\$1,347,590
Beer, Wine & Liquor Stores	\$10,158,632	\$4,067,646	\$6,090,986
Health & Personal Care Stores	\$32,989,770	\$20,028,755	\$12,961,015
Food Services & Drinking Places			
Full-Service Restaurants	\$97,154,081	\$56,708,379	\$40,445,702
Limited-Service Eating Places	\$59,486,352	\$34,171,257	\$25,315,095

Table 17. Retail Areas' Residents' Neighborhood Goods and Eating and Drinking Expenditure Potential, Estimated Retail Sales and Leakage/Surplus, 2010 (Continued)

Store Type	Demand	Supply (Retail)	Retail Gap ¹
West Alexandria/ Eisenhower Valley Subarea			
Food & Beverage Stores			
Grocery Stores	\$93,152,728	\$122,822,837	-\$29,670,109
Specialty Food Stores	\$682,839	\$287,406	\$395,433
Beer, Wine & Liquor Stores	\$6,537,979	\$5,470,639	\$1,067,340
Health & Personal Care Stores	\$18,581,857	\$6,681,775	\$11,900,082
Food Services & Drinking Places			
Full-Service Restaurants	\$53,575,617	\$32,237,098	\$21,338,519
Limited-Service Eating Places	\$29,014,557	\$21,691,346	\$7,323,211
Braddock Road/ Del Ray Subarea			
Food & Beverage Stores			
Grocery Stores	\$63,835,342	\$17,772,810	\$46,062,532
Specialty Food Stores	\$467,322	\$1,116,875	-\$649,553
Beer, Wine & Liquor Stores	\$4,523,036	\$2,452,352	\$2,070,684
Health & Personal Care Stores	\$12,988,590	\$5,196,935	\$7,791,655
Food Services & Drinking Places			
Full-Service Restaurants	\$36,704,619	\$15,455,514	\$21,249,105
Limited-Service Eating Places	\$19,825,603	\$4,032,736	\$15,792,867
Old Town Subarea			
Food & Beverage Stores			
Grocery Stores	\$74,478,245	\$46,966,533	\$27,511,712
Specialty Food Stores	\$546,502	\$969,996	-\$423,494
Beer, Wine & Liquor Stores	\$5,243,219	\$6,602,489	-\$1,359,270
Health & Personal Care Stores	\$14,922,551	\$13,858,499	\$1,064,052
Food Services & Drinking Places			
Full-Service Restaurants	\$43,266,317	\$63,124,342	-\$19,858,025
Limited-Service Eating Places	\$23,280,440	\$23,838,547	-\$558,107

¹A positive amount indicates that residents' dollars are going to stores outside the market area. A negative amount indicates that the market area stores are drawing sales from shoppers who do not live in the market area.

Sources: ESRI, 2013; Partners for Economic Solutions, 2013.

The existence of a gap does not necessarily prove the need for additional retailers. Given proximity to other subareas, there is a lot of cross-shopping across subarea boundaries. For example, the \$62.7 million gap for full-service restaurants in the Pimmit Hills subarea most likely reflects the abundance of restaurants in Tysons Corner, which draw Pimmit Hills residents for dining. Also, most residents spend 25 to 30 percent of their eating and drinking dollars outside of their immediate neighborhood, buying lunch near work and eating out on vacation or for special occasions. This analysis focuses on neighborhood goods



and services and food and beverage retailers because Tysons Corner Center, Tysons Galleria and the region's other major malls along with big box retailers serve much of the corridor's demand for shoppers goods.

Table 17 suggests that today:

- Tysons Corner is well served by restaurants, limited-service eating establishments and drugstores. There may be opportunities for additional grocery stores to serve the local population.
- Pimmit Hills has a shortage of drugstores and restaurants, though this is likely met by offerings in Tysons Corner and Falls Church. It also shows potential to support another grocery store.
- Falls Church/Seven Corners could support a new grocery store that would also attract shoppers from the Pimmit Hills submarket. There also is room in the market for new restaurants.
- Baileys Crossroads/Beauregard Boulevard could support a grocery store, another drugstore and several restaurants, both full- and limited-service establishments.
- West Alexandria/Eisenhower Valley has a net inflow of grocery store dollars, indicating that it is attracting shoppers from the Baileys Crossroads/Beauregard Boulevard submarket and elsewhere. Unmet needs include a drugstore and additional restaurants.
- Braddock Road/Del Ray could support a new grocery store, a drugstore and new restaurants.
- Old Town's restaurants are attracting significant patronage from tourists, employees and other non-residents. It could support a small grocery store based on its own population or a larger grocery store in a location that could attract residents from nearby underserved areas.

Development Potentials

Few new regional shopping centers are expected to be developed over the near- and mid-term as the region and nation are currently over-stored. Trends toward e-commerce are reducing the need for bricks and mortar stores, particularly in segments such as music, books, electronics and other non-apparel goods that customers feel confident ordering without actually handling the merchandise. Many of the big box stores that once killed off small independent retailers are now themselves falling victim to on-line competition. The region's strongest major malls are likely to continue dominating the shoppers goods market with periodic upgrades and repositioning to respond to current market demands. Their size and locations would be hard to match anywhere else in the Route 7 corridor. Other weaker centers are already changing their formats and diversifying their use mix to accommodate housing and/or offices.



Continued growth in the corridor's population and employment base will support development of new retail facilities over the next decades. The bulk of those new facilities will be grocery stores and smaller retailers providing neighborhood goods and services and restaurants/eating establishments of all varieties.

Retailing is marked by continuous shifting and churning as retailers seek better locations and newer facilities and as businesses come and go. Changes in fashion and the prominence of individual chains are likely to remake local shopping districts and centers many times over before 2040.

Traditionally, transit has played a limited role in store location decisions and residents' shopping habits. Its greatest impact is on the creation of place and aggregation of demand. By supporting and encouraging mixed-use developments, transit can influence store locations by bringing customers together in one place, particularly for restaurants.

Lodging Development

The Close-In Northern Virginia hotel market clusters at several key locations, including several along Route 7. Hotel location decisions are driven by a number of factors: accessibility by car, air and transit; visibility; proximity to employment clusters; proximity to tourist destinations; and availability of support restaurants and retail. The Northern Virginia locations that best meet those criteria and have captured much of the recent hotel construction include:

- Tysons Corner
- Reston/Dulles Toll Road
- Dulles Airport/Route 28
- Fair Lakes
- Springfield
- National Airport/Crystal City
- Rosslyn
- Old Town/King Street Station area

Single hotels also have developed along major thoroughfares, though many of those are older facilities.

Route 7 Corridor

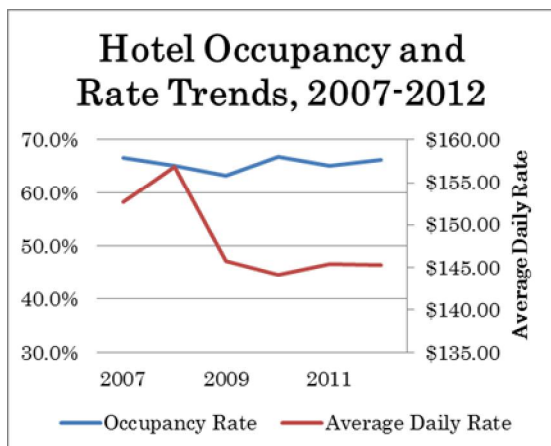
Route 7 has two of Northern Virginia’s major hotel clusters in Tysons Corner and Old Town as well as smaller clusters in Falls Church and along I-395. An inventory of the Route 7 corridor’s hotels appears in Appendix Table A-7. Table 18 summarizes the distribution of hotel rooms by geography and year built. Many of the older hotel/motels line Route 7, pre-dating other major highways. The Old Town submarket has seen the addition of almost 1,200 new hotel rooms since 2000, paralleling the office growth around the King Street Metro station. The development of almost 1,900 of Tysons Corner’s 3,400 hotel rooms occurred in the 1980s as Tysons emerged as the major cluster in the corridor. Reflecting the impacts of the recession, the only new hotels since 2010 are the Springhill Suites – Alexandria Tech Center on Eisenhower Avenue and the Hilton Garden Inn under construction in Falls Church.

Table 18. Hotel Rooms by Year Built and Subarea

Subarea	Year Built						Total Rooms
	Before 1970	1970-1979	1980-1989	1990-1999	2000-2009	2010-2013	
Tysons Corner		617	1,884	398	499		3,398
Pimmit Hills		405					405
Falls Church/ Seven Corners		255	105	157	126	110	753
Baileys Crossroads/ Beauregard Blvd.		298	881	104	143		1,426
W. Alexandria/ Eisenhower Valley	600		178			155	933
Braddock Rd./ Del Ray		203					203
Old Town	49	495	112	713	1,173		2,542
Total	649	2,273	3,160	1,372	1,941	265	9,660
Percent of Total	6.7%	23.5%	32.7%	14.2%	20.1%	2.7%	100.0%

Source: STR Global; Partners for Economic Solutions, 2013.

The corridor offers the full range of hotels from luxury to economy with an emphasis on



upper upscale and upscale hotels serving the large business community. Land prices largely have prevented development of new economy and midscale hotels, which typically depend on surface parking and low development costs.

The recent performance of the corridor’s hotels shows the impacts of the recession. Average occupancy peaked at 66.7 percent in 2007 and declined to 63.4 percent in 2009 before recovering to 66.3 percent in 2012. The average daily rate (ADR) reflects discounts and special package

deals offered in the face of low demand on weekends or in slow months. ADR peaked in 2008 at \$156.83 before falling 8.1 percent to \$144.16 in 2010 and starting to recover to \$145.33 in 2012.

Table 19. Route 7 Corridor Hotel Trends, 2007-2012

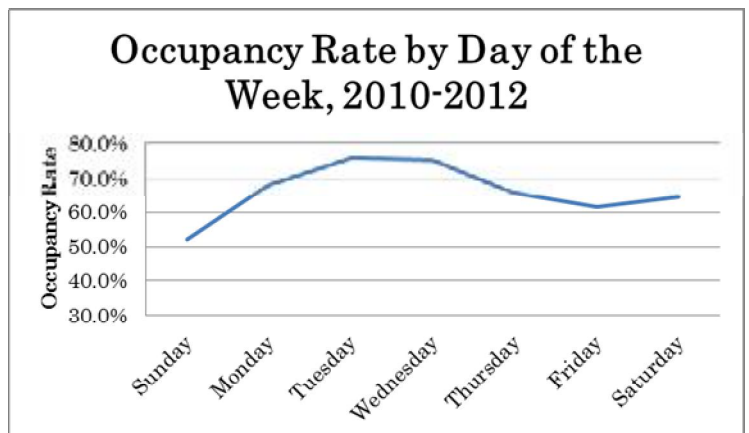
Year	Occupancy Rate	Average Daily Rate	Revenue per Available Room
2007	66.7%	\$152.64	\$101.78
2008	65.1%	\$156.83	\$102.13
2009	63.4%	\$145.75	\$92.45
2010	66.9%	\$144.16	\$96.50
2011	65.1%	\$145.46	\$94.69
2012	66.3%	\$145.33	\$96.40
2007-2012 Change			
Amount	-0.4%	-\$7.31	-\$5.38
Percent	-0.6%	-4.8%	-5.3%

Source: STR Global; Partners for Economic Solutions, 2013.



The corridor’s occupancy trends by month indicate that the area serves a strong business and conference market with high occupancies during key conference months of March to May and September to October. High occupancies in June, July and, to a lesser extent, August reflect the strength of the region’s tourism market.

This combination of markets is revealed as well in occupancy trends by the day of the week. While occupancy is highest Monday through Thursday nights as in most business markets, tourists and other visitors keep occupancies reasonably high on Friday and Saturday nights as well.





Development Potentials

Future hotel development potentials will depend on future growth in jobs and population as well as the need to replace some older properties that are ending their useful life. Long-term projections are difficult with any land use but particularly with hotels where technology will continue to influence the need to travel for face-to-face meetings and conferences.

The improved accessibility provided by the opening of Metro's Silver Line later this year will increase demand for hotels in Tysons Corner. That demand will be reinforced by the proposed developments and public realm improvements that will help transform this auto-dominated business center to a more walkable, pedestrian-friendly mixed-use community. Hotels function very well within mixed-use developments, providing patrons for the project's restaurants and retail while benefitting from the appeal of an activity center. Other mixed-use, walkable business districts will compete well, particularly those that can offer easy Metro access to tourists, business guests and other visitors..

IV. Preliminary Development Opportunities

Future development opportunities include current projects with development approvals or in the review process (i.e., in the development pipeline) as well as underutilized properties potentially suitable for reuse.

Development Pipeline

Appendix Table A-8 identifies a series of pipeline projects in the four jurisdictions with land in the corridor, though the level of information available for each project varies by jurisdiction.

Tysons Corner is anticipating many significant redevelopment projects, taking advantage of the new Metro access to redevelop underutilized properties as mixed-use developments. These include Scotts Run Station South with 36 acres of the former West-Gate office park along Dolley Madison Boulevard planned for 6.6 million square feet of office, residential, hotel and retail uses. In mid-2012, more than 1.0 million square feet of office space were under construction in Tysons Corner. Tysons Corner Center is planned for major intensification of the mall site with the addition of 3.5 million square feet of residential and office space and a hotel. Twenty-two acres of land on Chain Bridge Road at Anderson Road are proposed for redevelopment as a mixed-use project. An additional 26 acres are proposed for office, hotel, residential and retail development along Westpark Drive between Leesburg Pike and Greensboro Drive. The Spring Hill Station project is expanding with a second major residential tower.

On a different scale, Falls Church and Seven Corners include seven proposed projects with office, retail, multi-family and townhouse development. A new Harris Teeter supermarket is planned for development on Route 7.

In the Baileys Crossroads/Beauregard Boulevard subarea, Mark Center has development plans for additional office buildings and two residential developments are currently under construction.

Major projects in the West Alexandria/Eisenhower Valley include multiple phases of the Carlyle and Hoffman Center along Eisenhower Avenue. Victory Center has been approved as a major office building.



Braddock Road/Del Ray is seeing a multi-phased redevelopment of the James Bland public housing for new residential townhouses and multi-family units. Potomac Yard is a multi-year mixed-use development with development currently under construction and more planned to take advantage of a planned on-site Metro station. Three other major projects are approved for residential and retail development: Braddock Gateway and Braddock Metro Place. A major Safeway is proposed for King Street.

Old Town has several projects under construction, including The Madison on N. Henry Street, Windows of Old Town Condominiums on N. Royal Street, Beasley Square on Duke Street and the Asher on N. Payne Street. A new Harris Teeter supermarket is being built in Old Town North.

Underutilized Properties

Opportunities for development in the Route 7 corridor must focus on redevelopment sites due to the limited availability of “greenfield” sites not previously developed. Economic underutilization is a key factor in determining which properties are redeveloped. One measure easily accessed and compared across communities is the ratio of the value of improvements to the value of the land. This ratio indicates whether the current improvements are taking full advantage of the land, both in the use and the intensity of development. For the purposes of this analysis, underutilized is defined as having a building value less than 65 percent of the total property value, or roughly double the value of the land. PES accessed assessment records from Fairfax County, the City of Alexandria and Arlington County and used a Geographic Information System (GIS) to identify and map underutilized properties in the corridor. The maps on the following pages summarize the results of that analysis. The data indicate clusters of underutilized property in Tysons Corner, Seven Corners, Baileys Crossroads and _____. In Tysons Corner, most of the identified properties along Route 7 are underutilized by virtue of massive surface parking lots.

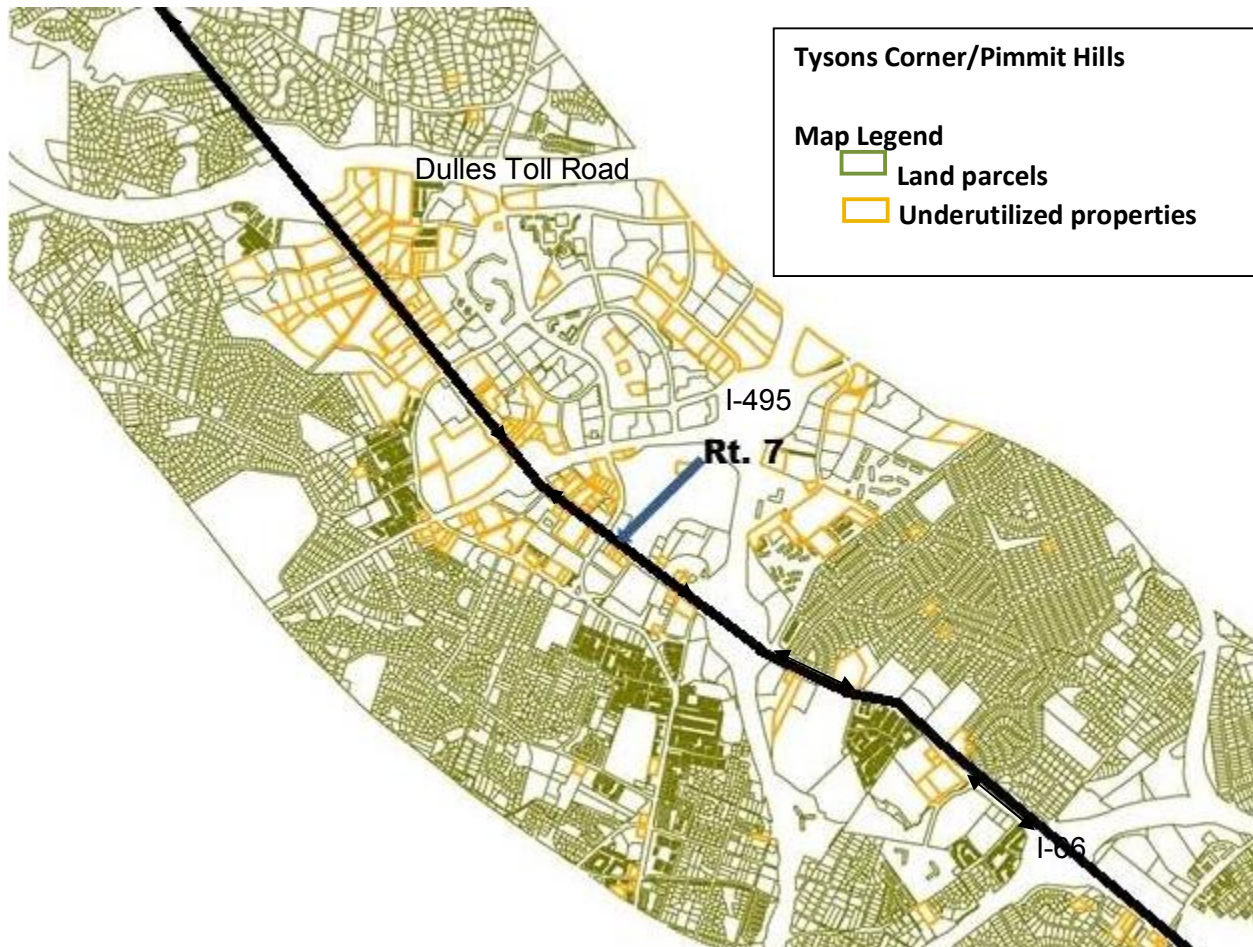
However, underutilization alone is not enough to identify future development opportunities because the existing use may still be providing an adequate return and assembling many small parcels into a larger parcel that can accommodate new development is difficult. While not as valuable as the new development might be, an existing strip shopping center may be providing a reasonable low-risk return to its owners, some of whom are older and not interested or not well equipped to undertake a major redevelopment. Such owners often are reluctant to sell or redevelop.



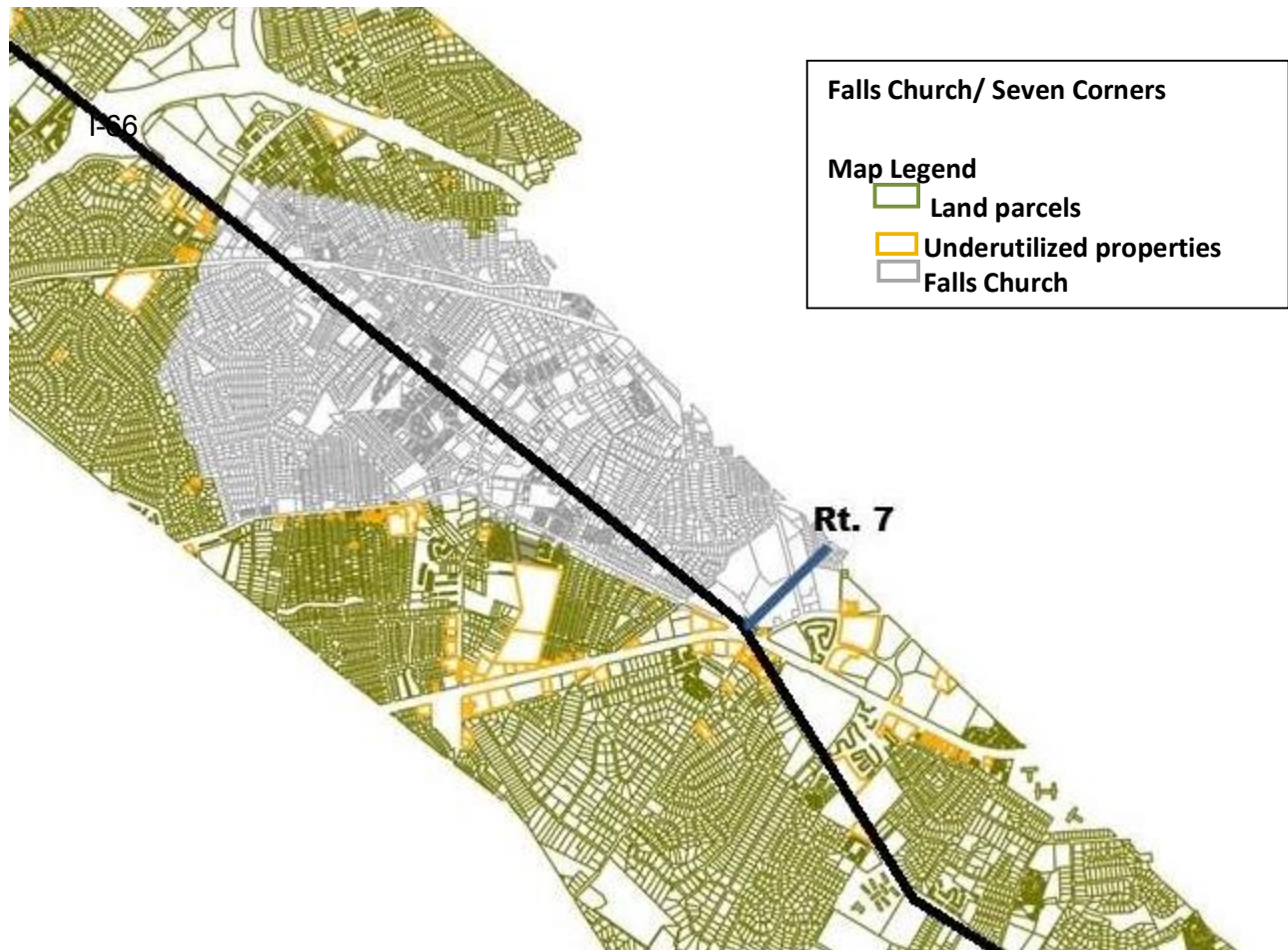
There also may be reluctance to be the first major redevelopment in an unproven market. A single individual investor may find it hard to turn around the basic market forces in a corridor characterized by low-intensity strip commercial uses. Changing the character of such a corridor location typically takes time and public actions to help create a supportive environment. The extent and status of such plans affect the timing of redevelopment and attraction of major private investment. Plans for different portions of the Route 7 corridor call for major public investments and improvements, some of which are underway or done.

As a result, the near-term redevelopment is likely to focus on the northern and southern ends of the corridor – Tysons Corner and the Old Town/King Street Metro station area.

Underutilized Properties in Tysons Corner and Pimmit Hills Subareas



Underutilized Properties in Falls Church/Seven Corners Subarea





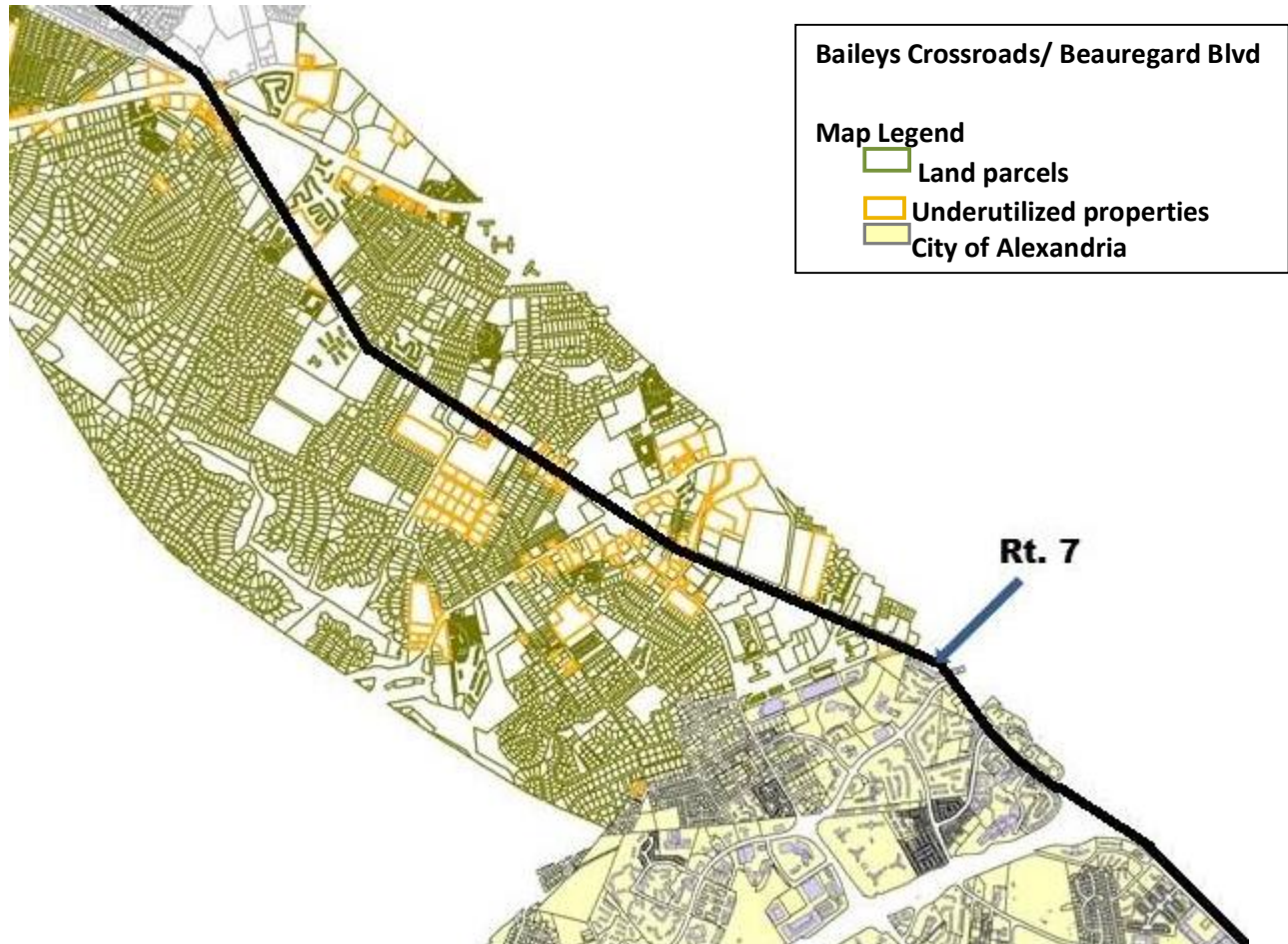
Falls Church/ Seven Corners

Map Legend

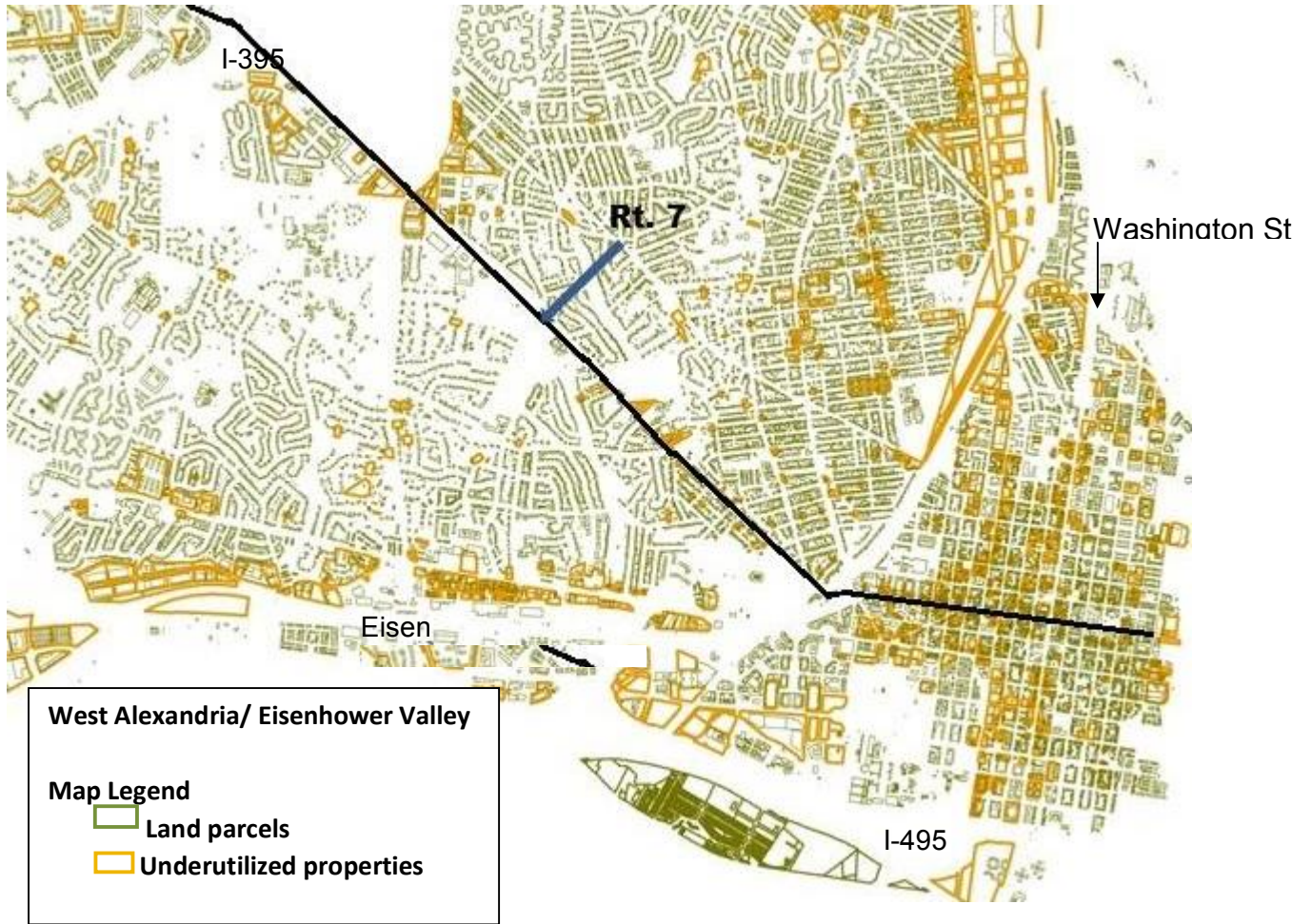
- Buildings
- Underutilized properties

Falls Church

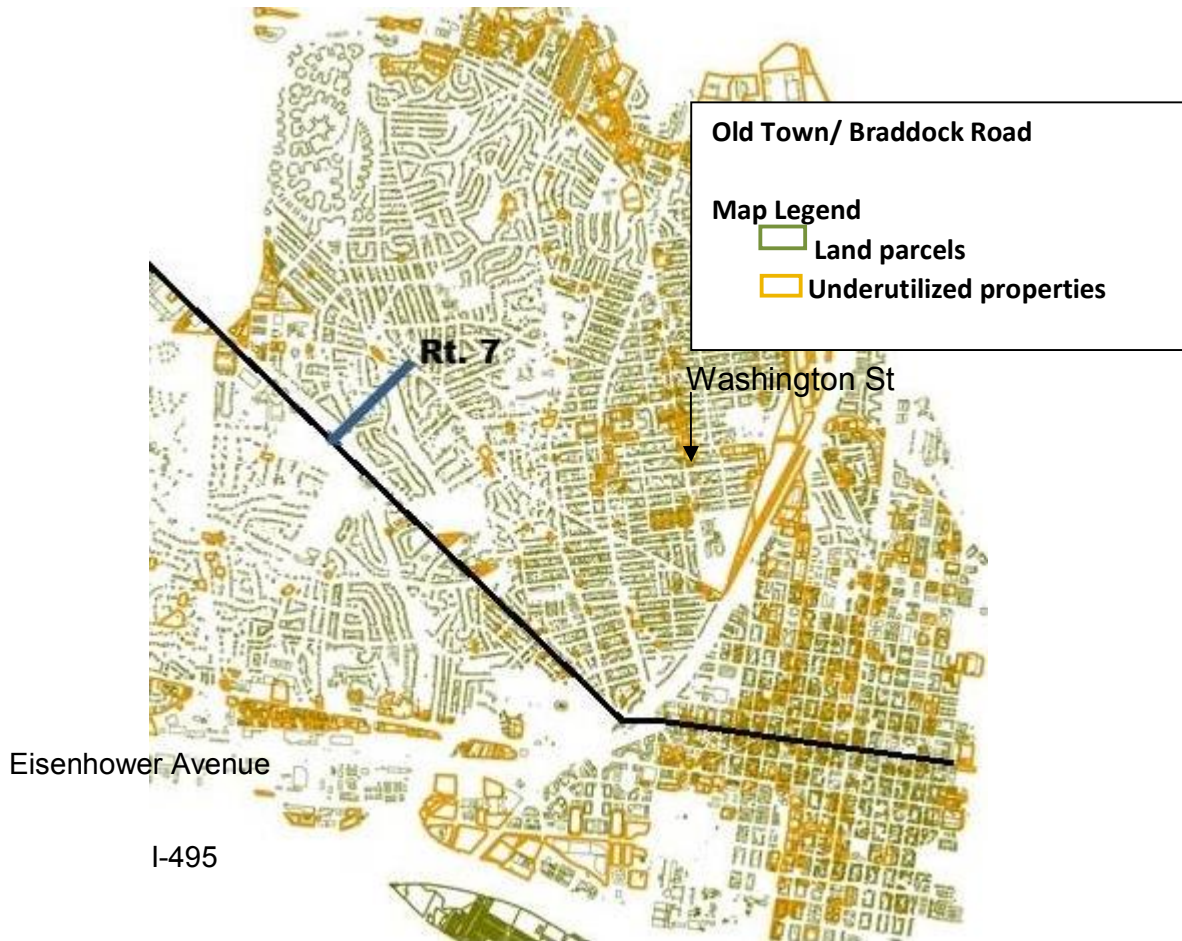
Underutilized Properties in Baileys Crossroads/Beauregard Boulevard Subarea



Underutilized Properties in West Alexandria/Eisenhower Valley Subarea



Underutilized Properties in Old Town/Braddock Road/Del Ray Subareas





Appendix Tables

Table A-1. Population Trends, 1990-2010

	Tysons Corner	Pimmit Hills	Falls Church/ Seven Corners	Baileys Crossroads/ Beauregard Blvd.	West Alexandria/ Eisenhower Valley	Braddock Road/ Del Ray	Old Town	Route 7 Corridor
Population								
1990	36,400	56,183	83,297	70,138	26,796	26,676	17,764	317,254
2000	42,831	59,044	91,397	82,090	33,654	26,369	19,712	355,097
2010	47,421	65,551	96,372	83,998	40,365	27,160	21,398	382,265
1990-2010 Change	30.3%	16.7%	15.7%	19.8%	50.6%	1.8%	20.5%	20.5%
1990-2000 Change	17.7%	5.1%	9.7%	17.0%	25.6%	-1.2%	11.0%	11.9%
2000-2010 Change	10.7%	11.0%	5.4%	2.3%	19.9%	3.0%	8.6%	7.7%
Median Age								
2010	42.3	38.4	35.8	34.4	35.7	38.2	40.2	40.2
Source: ESRI, 2010 Census Profile, 1990-2000 Comparison Profile; Partners for Economic Solutions, 2013.								

Table A-2. Population and Age Distribution, and Households by Type, 2010

	Tysons Corner		Pimmit Hills		Falls Church/ Seven Corners		Baileys Crossroads/ Beauregard Blvd.	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Population Trends								
1990	36,400		56,183		83,297		70,138	
2000	42,831		59,044		91,397		82,090	
2010	47,421		65,551		96,372		83,998	
1990-2010 Change	11,021	30.3%	9,368	16.7%	13,075	15.7%	13,860	19.8%
1990-2000 Change	6,431	17.7%	2,861	5.1%	8,100	9.7%	11,952	17.0%
2000-2010 Change	4,590	10.7%	6,507	11.0%	4,975	5.4%	1,908	2.3%
Household Trends								
1990	12,758		22,820		32,025		34,369	
2000	15,965		24,420		33,835		37,572	
2010	16,647		25,030		34,074		36,729	
1990-2010 Change	3,889	30.5%	2,210	9.7%	2,049	6.4%	2,360	6.9%
1990-2000 Change	3,207	25.1%	1,600	7.0%	1,810	5.7%	3,203	9.3%
2000-2010 Change	682	4.3%	610	2.5%	239	0.7%	(843)	-2.2%
Population by Age (2010)								
Under 20 Years	12,804	27.0%	16,298	24.9%	23,735	24.6%	16,330	19.4%
20 to 24 Years	1,741	3.7%	3,098	4.7%	5,984	6.2%	5,346	6.4%
25 to 34 Years	4,509	9.5%	10,024	15.3%	17,166	17.8%	21,599	25.7%
35 to 44 Years	6,656	14.0%	10,243	15.6%	15,333	15.9%	14,524	17.3%
45 to 54 Years	8,472	17.9%	9,904	15.1%	13,644	14.2%	10,847	12.9%
55 to 64 Years	6,695	14.1%	8,025	12.2%	10,606	11.0%	8,283	9.9%
65 to 74 Years	3,968	8.4%	4,239	6.5%	5,407	5.6%	3,781	4.5%
75 to 84 Years	1,943	4.1%	2,396	3.7%	2,837	2.9%	2,103	2.5%
85 Years and Over	633	1.3%	1,324	2.0%	1,660	1.7%	1,185	1.4%
Total Population	47,421	100.0%	65,551	100.0%	96,372	100.0%	83,998	100.0%
Median Age	42.3		38.4		35.8		34.4	
	West Alexandria/ Eisenhower Valley		Braddock Road/ Del Ray		Old Town		Route 7 Corridor	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Population Trends								
1990	26,796		26,676		17,764		317,254	
2000	33,654		26,369		19,712		355,097	
2010	40,365		27,160		21,398		382,265	
1990-2010 Change	13,569	50.6%	484	1.8%	3,634	20.5%	65,011	20.5%
1990-2000 Change	6,858	25.6%	(307)	-1.2%	1,948	11.0%	37,843	11.9%
2000-2010 Change	6,711	19.9%	791	3.0%	1,686	8.6%	27,168	7.7%
Household Trends								
1990	12,933		11,630		9,451		135,986	
2000	16,352		12,159		11,207		151,510	
2010	19,555		11,960		10,877		154,872	
1990-2010 Change	6,622	51.2%	330	2.8%	1,426	15.1%	18,886	13.9%
1990-2000 Change	3,419	26.4%	529	4.5%	1,756	18.6%	15,524	11.4%
2000-2010 Change	3,203	19.6%	(199)	-1.6%	(330)	-2.9%	3,362	2.2%
Population by Age (2010)								
Under 20 Years	6,962	17.2%	5,795	21.3%	3,019	14.1%	84,943	22.2%
20 to 24 Years	2,558	6.3%	892	3.3%	881	4.1%	20,500	5.4%
25 to 34 Years	10,116	25.1%	5,144	18.9%	4,793	22.4%	73,351	19.2%
35 to 44 Years	7,079	17.5%	5,297	19.5%	3,649	17.1%	62,781	16.4%
45 to 54 Years	5,508	13.6%	3,961	14.6%	3,134	14.6%	55,470	14.5%
55 to 64 Years	4,523	11.2%	3,399	12.5%	3,200	15.0%	44,731	11.7%
65 to 74 Years	2,112	5.2%	1,553	5.7%	1,786	8.3%	22,846	6.0%
75 to 84 Years	1,080	2.7%	674	2.5%	684	3.2%	11,717	3.1%
85 Years and Over	427	1.1%	445	1.6%	252	1.2%	5,926	1.6%
Total Population	40,365	100.0%	27,160	100.0%	21,398	100.0%	382,265	100.0%
Median Age	35.7		38.2		40.2		37.0	

Source: ESRI, 2010 Census Profile, 1990-2000 Comparison Profile; Partners for Economic Solutions, 2013.

Table A-3. Household Tenure, Type, Size and Vehicle Ownership, 2010

	Tysons Corner		Pimmit Hills		Falls Church/ Seven Corners		Baileys Crossroads/ Beauregard Blvd.	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Tenure, 2010								
Owner	13,416	80.6%	18,006	71.9%	20,655	60.6%	15,621	42.5%
Renter	3,231	19.4%	7,024	28.1%	13,419	39.4%	21,108	57.5%
Total	16,647	100.0%	25,030	100.0%	34,074	100.0%	36,729	100.0%
Households by Type, 2010								
Family Households	12,699	76.3%	15,853	63.3%	21,511	63.1%	16,538	45.0%
Married-Couple Families	11,333	68.1%	13,204	52.8%	16,443	48.3%	11,791	32.1%
With Related Children	5,547	33.3%	6,310	25.2%	7,812	22.9%	5,205	14.2%
Other Family (No Spouse)	1,366	8.2%	2,649	10.6%	5,068	14.9%	4,747	12.9%
With Related Children	629	3.8%	1,419	5.7%	2,490	7.3%	2,448	6.7%
Non-Family Households	3,948	23.7%	9,177	36.7%	12,563	36.9%	20,191	55.0%
Households by Size, 2010								
1 Person Household	3,379	20.3%	7,495	29.9%	9,829	28.8%	16,573	45.1%
2 Person Household	5,537	33.3%	7,921	31.6%	9,803	28.8%	10,507	28.6%
3-4 Person Household	5,768	34.6%	7,585	30.3%	11,240	33.0%	8,085	22.0%
5+ Person Household	1,963	11.8%	2,029	8.1%	3,202	9.4%	1,564	4.3%
Households, 2010								
Average Household Size	2.71		2.53		2.74		2.12	
Vehicle Ownership, 2010								
None	628	3.8%	1,084	4.3%	3,155	9.3%	3,472	9.5%
Owns 1 vehicle	3,342	20.1%	8,610	34.4%	12,570	36.9%	20,007	54.5%
Owns 2 or more vehicles	12,677	76.2%	15,336	61.3%	18,349	53.9%	13,250	36.1%
Average Vehicles	2.1		1.8		1.7		1.4	
	West Alexandria/ Eisenhower Valley		Braddock Road/ Del Ray		Old Town		Route 7 Corridor	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Tenure, 2010								
Owner	8,646	44.2%	7,980	66.7%	6,120	56.3%	90,444	58.4%
Renter	10,909	55.8%	3,980	33.3%	4,757	43.7%	64,428	41.6%
Total	19,555	100.0%	11,960	100.0%	10,877	100.0%	154,872	100.0%
Households by Type, 2010								
Family Households	8,916	45.6%	6,416	53.6%	4,494	41.3%	86,427	55.8%
Married-Couple Families	6,032	30.8%	5,201	43.5%	3,569	32.8%	67,573	43.6%
With Related Children	2,114	10.8%	2,330	19.5%	760	7.0%	30,078	19.4%
Other Family (No Spouse)	2,884	14.7%	1,215	10.2%	925	8.5%	18,854	12.2%
With Related Children	1,518	7.8%	508	4.2%	517	4.8%	9,529	6.2%
Non-Family Households	10,639	54.4%	5,544	46.4%	6,383	58.7%	68,445	44.2%
Households by Size, 2010								
1 Person Household	9,121	46.6%	4,509	37.7%	5,356	49.2%	56,262	36.3%
2 Person Household	6,280	32.1%	4,168	34.8%	4,039	37.1%	48,255	31.2%
3-4 Person Household	3,708	19.0%	2,639	22.1%	1,183	10.9%	40,208	26.0%
5+ Person Household	446	2.3%	644	5.4%	299	2.7%	10,147	6.6%
Households, 2010								
Average Household Size	1.94		2.19		1.80		2.35	
Vehicle Ownership, 2010								
None	1,677	8.6%	546	4.6%	1,321	12.1%	11,883	7.7%
Owns 1 vehicle	11,141	57.0%	5,479	45.8%	5,783	53.2%	66,932	43.2%
Owns 2 or more vehicles	6,737	34.5%	5,935	49.6%	3,773	34.7%	76,057	49.1%
Average Vehicles	1.3		1.6		1.3		1.6	

Source: U.S. Census Bureau, 2006-2010 ACS; Partners for Economic Solutions, 2013.

Table A-4. Households by Income, 2010

	Tysons Corner		Pimmit Hills		Falls Church/ Seven Corners		Baileys Crossroads/ Beaugard Blvd.	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Household Income								
Less than \$15,000	598	3.6%	927	3.7%	2,323	6.8%	2,209	6.0%
\$15,000 to \$24,999	389	2.3%	604	2.4%	2,404	7.1%	2,007	5.5%
\$25,000 to \$34,999	350	2.1%	707	2.8%	1,803	5.3%	2,321	6.3%
\$35,000 to \$49,999	681	4.1%	1,480	5.9%	3,363	9.9%	4,529	12.3%
\$50,000 to \$74,999	1,314	7.9%	3,230	12.9%	5,153	15.1%	8,003	21.8%
\$75,000 to \$99,999	1,461	8.8%	3,011	12.0%	4,138	12.1%	5,506	15.0%
\$100,000 to \$149,999	3,233	19.4%	5,529	22.1%	6,379	18.7%	7,250	19.7%
\$150,000 or More	8,621	51.8%	9,542	38.1%	8,511	25.0%	4,904	13.4%
Total Households	16,647	100.0%	25,030	100.0%	34,074	100.0%	36,729	100.0%
Median Household Income	\$151,740		\$123,303		\$86,983		\$72,821	
Mean Household Income	\$169,463		\$145,629		\$94,895		\$83,455	
	West Alexandria/ Eisenhower Valley		Braddock Road/ Del Ray		Old Town		Route 7 Corridor	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Household Income								
Less than \$15,000	1,269	6.5%	398	3.3%	866	8.0%	8,590	5.5%
\$15,000 to \$24,999	846	4.3%	536	4.5%	485	4.5%	7,271	4.7%
\$25,000 to \$34,999	990	5.1%	697	5.8%	434	4.0%	7,302	4.7%
\$35,000 to \$49,999	2,561	13.1%	811	6.8%	626	5.8%	14,051	9.1%
\$50,000 to \$74,999	3,502	17.9%	1,674	14.0%	1,227	11.3%	24,103	15.6%
\$75,000 to \$99,999	3,056	15.6%	1,585	13.3%	1,405	12.9%	20,162	13.0%
\$100,000 to \$149,999	3,925	20.1%	2,682	22.4%	2,329	21.4%	31,327	20.2%
\$150,000 or More	3,406	17.4%	3,577	29.9%	3,505	32.2%	42,066	27.2%
Total Households	19,555	100.0%	11,960	100.0%	10,877	100.0%	154,872	100.0%
Median Household Income	\$79,968		\$105,134		\$108,178		\$95,000	
Mean Household Income	\$88,874		\$106,490		\$130,810		\$107,352	

Source: U.S. Census Bureau, 2006-2010 ACS; Partners for Economic Solutions, 2013.

Table A-5. Means of Transportation to Work, 2010

Workers 16 and Over	Tysons Corner		Pimmit Hills		Falls Church/ Seven Corners		Baileys Crossroads/ Beaugard Blvd.	
	Employed Residents	Percent	Employed Residents	Percent	Employed Residents	Percent	Employed Residents	Percent
Means of Transportation								
Car, Truck, or Van	19,021	83.1%	26,450	75.9%	38,801	76.6%	36,094	73.8%
Drove alone	16,990	74.2%	23,605	67.7%	32,451	64.1%	31,269	63.9%
Carpooled	2,031	8.9%	2,845	8.2%	6,350	12.5%	4,825	9.9%
Public Transportation (excluding taxicab)	1,385	6.0%	4,724	13.6%	7,076	14.0%	9,441	19.3%
Motorcycle, Bicycle, Walked, Other Means or Worked at Home	2,487	10.9%	3,683	10.6%	4,774	9.4%	3,391	6.9%
Total	22,893	100.0%	34,857	100.0%	50,651	100.0%	48,926	100.0%
Workers 16 and Over	West Alexandria/ Eisenhower Valley		Braddock Road/ Del Ray		Old Town		Route 7 Corridor	
	Employed Residents	Percent	Employed Residents	Percent	Employed Residents	Percent	Employed Residents	Percent
Means of Transportation								
Car, Truck, or Van	16,508	67.3%	12,201	73.3%	7,832	60.1%	156,907	74.2%
Drove alone	14,384	58.7%	10,895	65.4%	7,013	53.8%	136,607	64.6%
Carpooled	2,124	8.7%	1,306	7.8%	819	6.3%	20,300	9.6%
Public Transportation (excluding taxicab)	6,126	25.0%	2,664	16.0%	3,139	24.1%	34,555	16.3%
Motorcycle, Bicycle, Walked, Other Means or Worked at Home	1,882	7.7%	1,787	10.7%	2,061	15.8%	20,065	9.5%
Total	24,516	100.0%	16,652	100.0%	13,032	100.0%	211,527	100.0%

Source: U.S. Census Bureau, 2006-2010 ACS; Partners for Economic Solutions, 2013.

Table A-6. Northern Virginia Metropolitan Division Employment Trends, 2002-2011

Industry Title	2002	2007	2011	2002-2011 Change	
				Number	Percent
Accommodation and Food Services	85,766	98,624	102,928	17,162	20.0%
Administrative and Support and Waste Management	70,872	75,947	74,020	3,148	4.4%
Agriculture, Forestry, Fishing, Hunting	1,436	1,404	1,232	-204	-14.2%
Arts, Entertainment, and Recreation	20,510	22,974	23,824	3,314	16.2%
Construction	77,602	86,265	65,895	-11,707	-15.1%
Educational Services	84,548	102,635	110,429	25,881	30.6%
Finance and Insurance	41,201	44,525	41,828	627	1.5%
Health Care and Social Assistance	87,541	101,014	115,729	28,188	32.2%
Information	62,810	50,304	41,004	-21,806	-34.7%
Management of Companies and Enterprises	22,122	27,439	27,164	5,042	22.8%
Manufacturing	29,069	28,470	25,095	-3,974	-13.7%
Mining, Quarrying, and Oil and Gas Extraction	541	620	610	69	12.8%
Other Services (except Public Administration)	51,822	55,836	57,563	5,741	11.1%
Professional, Scientific, and Technical Services	180,911	235,906	257,339	76,428	42.2%
Public Administration	75,833	90,314	101,320	25,487	33.6%
Real Estate and Rental and Leasing	21,249	22,224	20,102	-1,147	-5.4%
Retail Trade	124,061	137,244	134,412	10,351	8.3%
Transportation and Warehousing	46,112	44,730	42,275	-3,837	-8.3%
Utilities	5,031	4,964	5,024	-7	-0.1%
Wholesale Trade	30,642	31,336	28,218	-2,424	-7.9%
Total, All Industries	1,119,679	1,262,790	1,276,016	156,337	14.0%

Note: Asterisks indicate non-disclosable data

¹ The Northern Virginia portion of the Washington-Alexandria-Arlington Metropolitan Division includes the cities of Alexandria, Fairfax, Falls Church, Fredericksburg, Manassas and Manassas Park and the counties of Arlington, Clarke, Fairfax, Fauquier, Loudoun, Prince William, Spotsylvania, Stafford and Warren.

Source: Covered Employment and Wages Program, Virginia Employment Commission, 2013; Partners for Economic Solutions, 2013.

Table A-7. Hotel Inventory by Submarket, Route 7 Corridor

Property Name	Num. of Rooms	Year Opened	Chain	Chain Scale
Tysons Corner				
Ritz-Carlton Tysons Corner	398	1991	Ritz-Carlton	Luxury
Embassy Suites Tysons Corner	234	1984	Embassy Suites	Upper Upscale
Hilton McLean @ Tysons Corner	458	1987	Hilton	Upper Upscale
Marriott Tysons Corner	396	1981	Marriott	Upper Upscale
Sheraton Hotel Premiere Tysons Corner	449	1986	Sheraton Hotel	Upper Upscale
Courtyard Tysons Corner Fairfax	229	2000	Courtyard	Upscale
Crowne Plaza Tysons Corner McLean	316	1970	Crowne Plaza	Upscale
Hilton Garden Inn Tysons Corner	149	2006	Hilton Garden Inn	Upscale
Residence Inn Tysons Corner	96	1984	Residence Inn	Upscale
Residence Inn Tysons Corner Mall	121	2001	Residence Inn	Upscale
Comfort Inn Tysons Corner	251	1982	Comfort Inn	Upper Midscale
Best Western Tysons Westpark	301	1978	Best Western	Midscale
Pimmit Hills				
Westin Tysons Corner	405	1972	Westin	Upper Upscale
Falls Church/Seven Corners				
Hilton Garden Inn Falls Church	110	U/C	Hilton Garden Inn	Upscale
Comfort Inn Arlington Boulevard	110	1984	Comfort Inn	Upper Midscale
TownePlace Suites Falls Church	126	1999	TownePlace Suites	Upper Midscale
Best Western Falls Church Inn	105	1972	Best Western	Midscale
Econo Lodge Metro Washington	47	1987	Econo Lodge	Economy
Stratford Motor Lodge	50	1949	Independent	
Inns Of Virginia	32		Independent	
Governor House Inn	121	1963	Independent	
Budget Inn	52	1953	Independent	
Bailey's Crossroads/Beauregard Blvd.				
Hilton Alexandria Mark Center	496	1985	Hilton	Upper Upscale
Hilton Garden Inn Arlington Shirlington	143	2009	Hilton Garden Inn	Upscale
Homewood Suites Alexandria Pentagon	105	1986	Homewood Suites	Upscale
Comfort Inn Landmark Alexandria	150	1985	Comfort Inn	Upper Midscale
Hampton Inn Alexandria Pentagon South	130	1987	Hampton Inn	Upper Midscale
Days Inn Alexandria Washington DC	200	1979	Days Inn	Economy
Extended Stay America Washington DC	104	1999	Extended Stay	Economy
Bragg Towers Extended Stay Hotel	98	1972	Independent	
West Alexandria/Eisenhower Valley				
Courtyard Alexandria Tech Center	178	1987	Courtyard	Upscale
Springhill Suites Alexandria Tech Center	155	2011	Springhill Suites	Upscale
Holiday Inn Alexandria SW Eisenhower	197	1963	Holiday Inn	Upper Midscale
Hawthorn Suites by Wyndham	184	1963	Hawthorn Suites	Midscale
Washington Suites	219	1965	Independent	
Braddock Road/Del Ray				
Courtyard Alexandria Pentagon South	203	1975	Courtyard	Upscale

Table A-7. Hotel Inventory by Submarket, Route 7 Corridor (Continued)

Property Name	Num. of Rooms	Year Opened	Chain	Chain Scale
Old Town				
Embassy Suites Alexandria Old Town	288	1990	Embassy Suites	Upper Upscale
Hilton Alexandria Old Town	246	2000	Hilton	Upper Upscale
Kimpton Hotel Monaco Alexandria	241	1975	Kimpton	Upper Upscale
Kimpton Lorien Hotel & Spa	107	2009	Kimpton	Upper Upscale
Kimpton Morrison House	45	1985	Kimpton	Upper Upscale
Sheraton Hotel Suites Old Town	247	1990	Sheraton Hotel	Upper Upscale
Westin Alexandria Hotel	319	2007	Westin	Upper Upscale
Residence Inn Alexandria Old Town Duke	240	2003	Residence Inn	Upscale
Residence Inn Alexandria Old Town	181	2008	Residence Inn	Upscale
Crowne Plaza Old Town Alexandria	254	1972	Crowne Plaza	Upscale
Holiday Inn & Suites Historic District	178	1995	Holiday Inn	Upper Midscale
Hampton Inn Alexandria Old Town King	80	2001	Hampton Inn	Upper Midscale
Best Western Old Colony Inn	49	1960	Best Western	Midscale
Travelodge Alexandria Old Town	40	1987	Travelodge	Economy
Towne Motel	27	1983	Independent	

Source: STR Global, 2013; Partners for Economic Solutions, 2013.

Table A-8. Route 7 Corridor Development Pipeline

Subarea/Developer	Project	Location	Acreage	Proposed Uses	Status
Tysons Corner					
	Corporate Office Center at Tysons II, Building H	1775 Tysons Blvd.	475,000 sf	Office	Delivery 3/2014
	Tysons West Health Center	1500 Cornerside Blvd.	35,000 sf	Office	Delivery 7/2013
	Tysons Tower	7900 Tysons One Place	524,432 sf	Office	Delivery 1/2014
Cityline Partners, LLC	Scotts Run Station South	Old Meadow Rd near Dolley Madison Blvd.	6.93	Transit Station Mixed Use: Residential, Hotel, Office and Commercial	Rezoning, Accepted 2/2013
Cityline Partners, LLC	Scotts Run Station South	Dolley Madison Blvd at Colshire Dr. and Anderson Rd.	23.54	Transit Station Mixed Use: Residential, Hotel, Office and Commercial	Rezoning, Accepted 2/2013
Garfield 1575 Anderson Rd. LLC	Scotts Run Station South	Dolley Madison Blvd at Anderson Rd.	2.57	Residential	Final Development Plan, Accepted 2/2013
Cityline Partners, LLC	Scotts Run Station South	Colshire Dr. south of Dolley Madison Blvd.	2.94	Commercial	Final Development Plan, Accepted 2/2013
Commons of McLean L/CAL, LLC		1600 Anderson Rd.	1.51	Residential	Final Development Plan, Accepted 12/2012
Commons of McLean L/CAL, LLC		Chain Bridge Rd. at Anderson Rd.	20.96	Mixed Use	Rezoning, Accepted 2/2013
Greensboro Park Property Owner, LLC		Greensboro Dr. at International Dr.	6.9	Office and Residential	Final Development Plan and Rezoning, Accepted 2/2013
Tysons West Residential, LLC and JBG/Tysons Hotel, LLC		Leesburg Pike at Westwood Center Dr.	16.02	Mixed Use	Rezoning, Accepted 11/2011
N V Commercial, Inc. and Clyde's Real Estate Group, Inc.		Leesburg Pike at Chain Bridge Rd.	5.79	Mixed Use	Rezoning, Accepted 4/2012
N V Commercial, Inc.		Leesburg Pike at Chain Bridge Rd.	0.97	Mixed Use	Final Development Plan, Accepted 4/2012
Campus Point Realty Corp and Tysons Westpark LC		Westpark Dr between Leesburg Pike and Greensboro Dr.	23.7	Office, Hotel, Residential, Retail	Rezoning, Accepted 12/2010
Campus Point Realty Corp		Westpark Dr at Greensboro Dr.	2.79	Mixed Use	Final Development Plan, 8/2012
Cars-DB1, LLC		Spring Hill Rd. at Leesburg Pike	7.62	Mixed Use	Rezoning, Accepted 5/2011
Cars-DB1, LLC		Leesburg Pike south of Spring Hill Rd.	11.96	Mixed Use	Rezoning, Accepted 5/2011
Q-R Spring Hill, LLC		Spring Hill Rd. at Leesburg Pike	3.52	Mixed Use	Rezoning, Accepted 9/2011
1587 Springhill Holdings, Inc.		Spring Hill Rd. west of Leesburg Pike	4.39	Mixed Use	Rezoning, Accepted 9/2011

Table A-8. Route 7 Corridor Development Pipeline (Continued)

Subarea/Developer	Project	Location	Acreage	Proposed Uses	Status
Pimmit Hills					
Falls Church/Seven Corners					
	Gateway			77,000 sf office; 8,700 sf retail, 150 residential units; 10 townhouses	
Jefferson Park, LLC	Hilton Garden Inn	706 W. Broad St.	1.14	110 rooms	Under Construction
Akridge	500-520 N Washington St.	500-520 N Washington St.	2.5	200 residential units; 14,853 sf retail; 71,002 sf office	Approved 2/2011
Hekemian & Co., Inc.	Northgate	472 N. Washington St.	1.53	95 apartments; 10 townhouses; 22,735 sf retail; 15,000 sf office	Delivery 5/2013
Rushmark Properties, LLC	Harris Teeter Project	255 W. Broad St.	1.3	372,000 sf: 265 market-rate apartments; 17 affordable apartments; Harris Teeter	Under Review
Silverwood Companies		6800 block of Lee Highway		228 residential units; 14,993 sf retail	Under Review
	Double Lee Park	6412 Seven Corners Place	18,000 sf	Office	Delivery 10/2012
Baileys Crossroads/Beauregard Boulevard					
	Mark Center - Plaza I	4850 Mark Center Drive		Office	On Hold
	Mark Center - Building 5	4850 Mark Center Drive		Office	Approved
	Polk Townhouse	5325 Polk Avenue		Residential	Approved
	Syme Property	1226 N. Pegram Street		Residential	Under Construction
	Picketts Ridge - Phase II	3 Buzzards Group		Residential	Under Construction
West Alexandria/Eisenhower Valley					
	Cooper Dawson Site	206 N. Quaker Lane		Residential	Under Construction
	Stevenson Avenue Condos	6125 Stevenson Avenue		Residential	Approved
	Carlyle - Block O	601 Holland Lane		Mixed-Use	Under Construction
	Carlyle - Block P	1800 Eisenhower Avenue		Mixed-Use	Approved
	Carlyle Plaza Two	760 John Carlyle Street		Mixed-Use	Preliminary - DSUP
	Landmark Gateway	631 S. Pickett Street		Mixed-Use	Approved
	Braddock Metro Place	1261 Madison Street		Residential	Approved
	Hoffman Town Center	2401 Eisenhower Avenue		Commercial	Approved
	Hoffman Center - Block 8	2301 Eisenhower Avenue		Commercial	Approved
	Hoffman Blocks 11 and 12	2210 Eisenhower Avenue		Mixed-Use	Approved
	Mercedes Benz	200 S. Pickett Street		Commercial	Preliminary
	Victory Center	5001 Eisenhower Avenue		Office	Approved
	Lindsay Lexus	3650 Wheeler Avenue		Commercial	Approved
	Taft Avenue Property	3700 Taft Avenue		Residential	Under Construction

Table A-8. Route 7 Corridor Development Pipeline (Continued)

Subarea/Developer	Project	Location	Acreage	Proposed Uses	Status
Braddock Road/Del Ray					
Alexandria Redevelopment and Housing Authority; EYA	James Bland Redevelopment	N. Patrick at Montgomery Street	8.5	Residential	Phased Delivery Through 2016
	Braddock Gateway	1219 First Street	278,498 s.f.	Retail and Residential	
	Braddock Metro Place		360 units	Residential	
	Potomac Yard Landbay L	2501 Jefferson Davis Highway		Residential	
	Potomac Yard Landbay L - Multi-family	1400 Main Line Boulevard		Residential	Approved
	Potomac Yard Landbay K	2601 Main Line Boulevard		Other	MYL
	Potomac Yard Landbay I-East	2301 Main Line Boulevard		Mixed-Use	Under Construction
	Potomac Yard Landbay I-West	2501 Jefferson Davis Highway		Residential	Approved
	Potomac Yard Landbay G	2801 Main Line Boulevard		Mixed-Use	Under Construction
	Safeway on King Street	3526 King Street		Commercial	Approved
	Yates Corner	515 Mt. Vernon Avenue		Retail	Approved
	2312 Mount Vernon Mixed-Use	2312 Mt. Vernon Avenue		Mixed-Use	Under Construction
Old Town					
	The Madison	800 N. Henry Street		Mixed-Use	Under Construction
	Harris Teeter - Old Town North	735 N. St. Asaph Street		Mixed-Use	Under Construction
	Kings Building at 923	923 King Street		Mixed-Use	MYL
	The Asher	621 N. Payne Street			Under Construction
	Windows of Old Town Condominiums	1125 N. Royal Street		Residential	Under Construction
	Beasley Square	1323 Duke Street		Residential	Under Construction

Source: Fairfax County Department of Planning and Zoning, Tysons Corner Activity; City of Falls Church Current and Pending Development Projects website; Arlington County Economic Development Current Development Summary; City of Alexandria GIS Planning & Development Viewer; Partners for Economic Solutions, 2013.

349 Cedar Street, NW
Washington, DC 20012
www.PESconsult.com