ROBERT CHARLES LESSER & CO.
REAL ESTATE ADVISORS

REVITALIZATION ANALYSIS
FOR
RICHMOND HIGHWAY

Prepared for

FAIRFAX COUNTY, VIRGINIA

Prepared by

ROBERT CHARLES LESSER & CO.

In Association with

CHK ARCHITECTS AND PLANNERS, INC.
BARTON-ASCHMAN ASSOCIATES, INC.

August 20, 1997

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ROBERT CHARLES LESSER & CO.
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RICHMOND HIGHWAY REPORT

INTRODUCTION AND EXECUTIVE SUMMARY

A. Summary of the Process

The Revitalization Division of the Fairfax County Department of Housing and Community Development retained Robert Charles Lesser & Co., in association with CHK Architects and Planners, Inc., and Barton-Aschman Associates, Inc., to prepare a Commercial Revitalization Analysis for the Richmond Highway Revitalization Area.

The study process involved an extensive "community visioning" process. This process recognizes that to achieve commercial revitalization, it is important to have a clear vision and a step by step action plan to get there. The process also recognizes that problems--as well as solutions--are best understood by those who live and work in the community, provided they are given the necessary technical support and information. This does not constitute a substitute for professional experience, knowledge and judgment, but analyses and plans prepared by professional consultants that integrate such input from the community are more reflective of community values and are more likely to be actually implemented.

This community visioning process was effectuated by means of a Commercial Revitalization Advisory Group selected by the two Supervisors serving the area to represent the broad interests of the community. The Commercial Revitalization Advisory Group participated in numerous meetings, including "visioning meetings" or charrettes, which were also open to the public. Some members of the Commercial Revitalization Advisory Group, as well as many others in the community and in the development and real estate industry, were interviewed on an individual basis. Furthermore, additional presentations and meetings were held with other community organizations, such as chambers of commerce, civic associations and the Southeast Fairfax Development Corporation.

B. Summary of Results

1. Development Profile

- The consulting team analyzed the market opportunity in the short- and mid-terms for various types of retail, entertainment, office, hotel/tourism, residential and high tech/research and development uses in the Richmond Highway Revitalization Area. Section I discusses the results of the market evaluation, which are summarized in EXHIBIT I-1.

- The consulting team also evaluated the current transportation and planning situation in the Revitalization Area, including assets, liabilities and various other considerations: the Comprehensive Plan; parcel size; vacant, blighted and underutilized properties; and assemblage possibilities. Section II discusses the results of this evaluation, which are shown visually in EXHIBITS II-1 through II-4 at the end of this report.

- The Commercial Revitalization Advisory Group agreed upon a series of revitalization goals for Richmond Highway. These are listed in Section III.

2. Recommended Revitalization Scenario and Implementation/Marketing Plan

- The Commercial Revitalization Advisory Group worked with the consulting team to develop a preferred long-term vision for the Revitalization Area. The preferred vision is described in Section IV and illustrated in EXHIBIT IV-1, at the end of this report, and the other exhibits relating to that section.

- Organizational changes will be required if progress is to be made toward the preferred vision and the recommended programs and actions are to be successfully implemented. Fortunately, the Richmond Highway Revitalization Area has an organization already in place, Southeast Fairfax Development Corporation (SFDC), that can with certain modifications assume these responsibilities. Recommendations regarding organization changes are discussed in Section V.

- Successful revitalization will require a comprehensive approach with multiple programs and actions undertaken simultaneously in a coordinated fashion. The recommended programs and actions for the Revitalization Area, devised by the consulting team in conjunction with the Commercial Revitalization Advisory Group, are described in Section VI and summarized in EXHIBITS VI-1 and VI-2. Section VII discusses the potential for facilitation of specific development/redevelopment projects, and Section VIII presents the key components of the work program that will be required over the next several years to implement the recommended programs and actions, including recommended responsibilities and potential funding sources.

PART ONE: DEVELOPMENT PROFILE

I. MARKET EVALUATION

It was evident from the first meetings with County staff and the Commercial Revitalization Advisory Group that there was interest in exploring the market for a wide range of uses, including residential. Therefore, the consulting team assessed the market opportunity in the short- and mid-terms for various types of retail, entertainment, office, hotel/tourism, residential and high-tech/research and development uses in the Richmond Highway revitalization area (this area is defined as the corridor beginning at the Beltway and extending along Richmond Highway to Ft. Belvoir and is referred to as "Richmond Highway" or "Richmond Highway Revitalization Area" throughout this report).

EXHIBIT I-1 summarizes the results of our market evaluation. Appendix A includes more detailed exhibits related to the market evaluation, including detailed demographic data on the components of the Primary Market Area.

A. Retail

1. Current Retail Situation in the Richmond Highway Revitalization Area

Richmond Highway has one of the largest concentrations of retail space in the metropolitan area. The 1.69 million square feet of retail space is virtually identical to the amount of space at Springfield Plaza, and approaching the 1.9 million square feet at Tysons Corner Center. The analysis was able to take advantage of a detailed inventory of businesses on Richmond Highway, which has been compiled by the Southeast Fairfax Development Corporation (SFDC) (see APPENDIX EXHIBIT A-1). The establishments were classified by type of store (SIC, or standard industrial classification, code), and the

EXHIBIT I-1
MARKET OPPORTUNITY SUMMARY
RICHMOND HIGHWAY

LAND USE	Near-Term 0 - 5 Years	Mid-Term 6 + Years	Comments
RETAIL			
New Neighborhood Center	90,000 sq. ft.		North of Beacon Mall
Facelift/Attractive Signage	XXX		e.g., Woodlawn Shopping Center
Additional Power Anchors in Existing Centers	XXX		Beacon Mall
Revitalization/Reconfiguration of Existing Centers		X	
Freestanding Restaurants/Stores	XXX		
ENTERTAINMENT			
Restaurant Neighborhood	20,000-40,000 sq. ft.		
Entertainment Component of Family Inn		XX	
OFFICE			
Low-Rise Local Serving Office		X	
Fairfax County Government Offices	100,000 sq. ft.		
Mt. Vernon Hospital Satellite Rehab Center		XX	
Mid-Rise Office Building		X	
HOTEL/TOURISM			
New National Chain Extended Stay Hotel	3-5 acres		
County Visitor Center	XX		
Family Inn with Restaurant and Conference Facils.		XX	Direct access to Mt. Vernon
RESIDENTIAL			
New Market-Rate Condominiums	48-60/yr.; max. 240		$100,000-$125,000
New Market-Rate Attached Homes	24-48/yr		$130,000-$150,000\
New Market-Rate Small Lot Single-Family Homes	18-30/yr		Primarily for empty nesters; access from SF area
New Seniors Housing	60 units now; 60 more in 3 years		
New Market-Rate Apartments		XX	$800-$1200
HIGH-TECH R&D			
Light Assembly		XX	

Key
XXX= Strong market opportunity
XX= Moderate market opportunity
X= Low market opportunity

aggregate square footage of the establishments in each category were calculated. The consulting team was able to obtain 1996 retail sales data by category for Richmond Highway based on Business, Professional and Occupational License (BPOL) filings. The consulting team also interviewed numerous merchants and shopping center owners on a confidential basis and was able to obtain useful information on sales levels and shopper locations.

The data on square footage and sales by store category are summarized in EXHIBIT I-2 and graphed on EXHIBITS I-2a, I-2b and I-2c. Overall, the Richmond Highway Revitalization Area has approximately 1,700,000 square feet of retail space. Approximately 29% of the space consists of general merchandise stores and apparel and accessory stores, but these stores are only achieving a subpar $139 sales per square foot. The next largest category (20%) is food stores, which are performing well at $368 per square foot (some of the major chain stores are performing even better than this). The next largest category is eating and drinking places (19%), which on average are achieving sales of $188 per square foot--a satisfactory but not exceptionally high level. There is also a significant group of miscellaneous retail, including everything from drug stores, which are reportedly performing well, to smaller specialty stores which in many cases are struggling (the overall average sales for this category are only $127 per square foot). The area also has representation of building materials and hardware (8%, performing well with average sales of $212 per square foot) and home furniture, furnishings and equipment (5%, with average sales of $142 per square foot--not bad for this category).

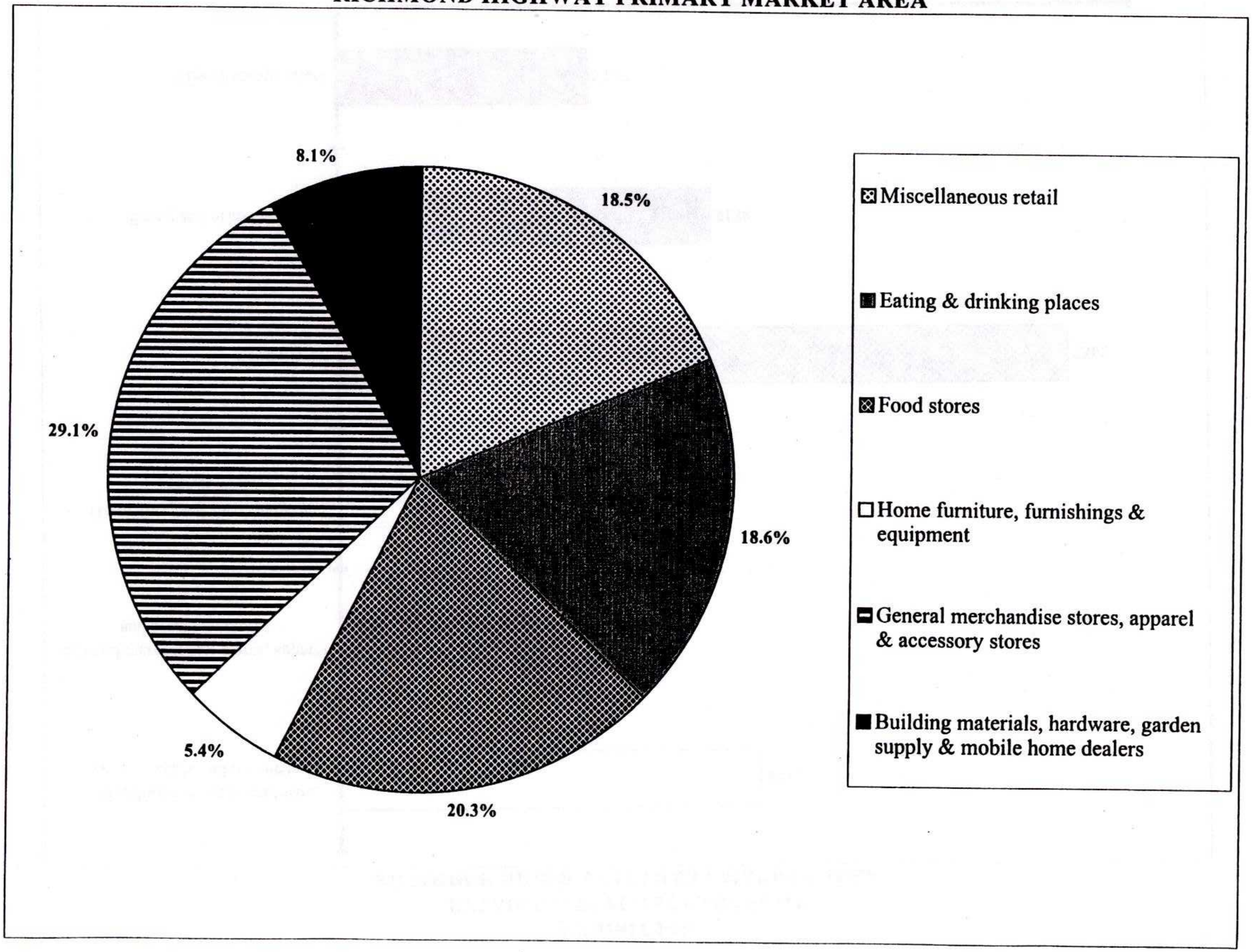
In general, sales at "convenience" establishments (i.e., those that cater to day-to-day shopper needs and tend to be selected based on proximity to home or work) are quite strong along Richmond Highway. These include food stores, drug stores (included in miscellaneous retail), and many (but by no means all) of the restaurants. On the other

EXHIBIT I-2
SALES PER SQUARE FOOT BY MAJOR RETAIL CATEGORY
RICHMOND HIGHWAY PRIMARY MARKET AREA

MAJOR RETAIL CATEGORY	1996 SALES (In Millions)	NO. OF SQUARE FEET	PERCENT OF SQUARE FEET	SALES PER SQUARE FOOT
Building materials, hardware, garden supply and mobile home dealers	$29.2	137,551	8.1%	$212
General merchandise stores, apparel and accessory stores	$68.5	492,397	29.1%	$139
Home furniture, furnishings and equipment	$13.0	91,849	5.4%	$142
Food stores	$126.6	344,000	20.3%	$368
Eating and drinking places	$59.3	315,781	18.6%	$188
Miscellaneous retail	$39.8	313,220	18.5%	$127
TOTAL	$336.4	1,694,798	100.0%	$198

SOURCE: Fairfax County; Southeast Fairfax Development Corporation; Robert Charles Lesser & Co.

EXHIBIT I-2a
DISTRIBUTION OF RETAIL SQUARE FOOTAGE
RICHMOND HIGHWAY PRIMARY MARKET AREA



SOURCE: Claritas, Inc.; Robert Charles Lesser & Co.

EXHIBIT I-2b
RETAIL SALES PER SQUARE FOOT
RICHMOND HIGHWAY PRIMARY MARKET AREA

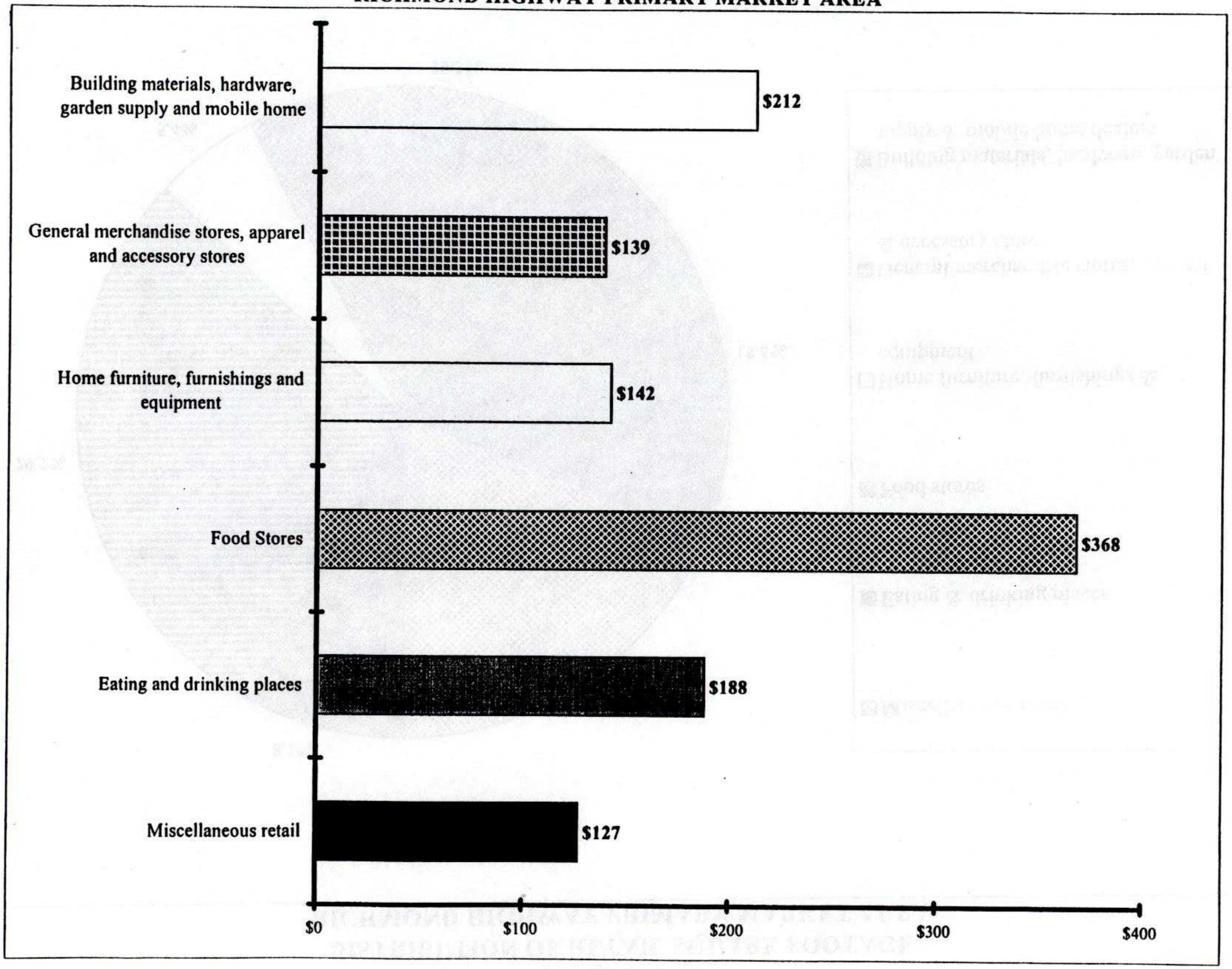
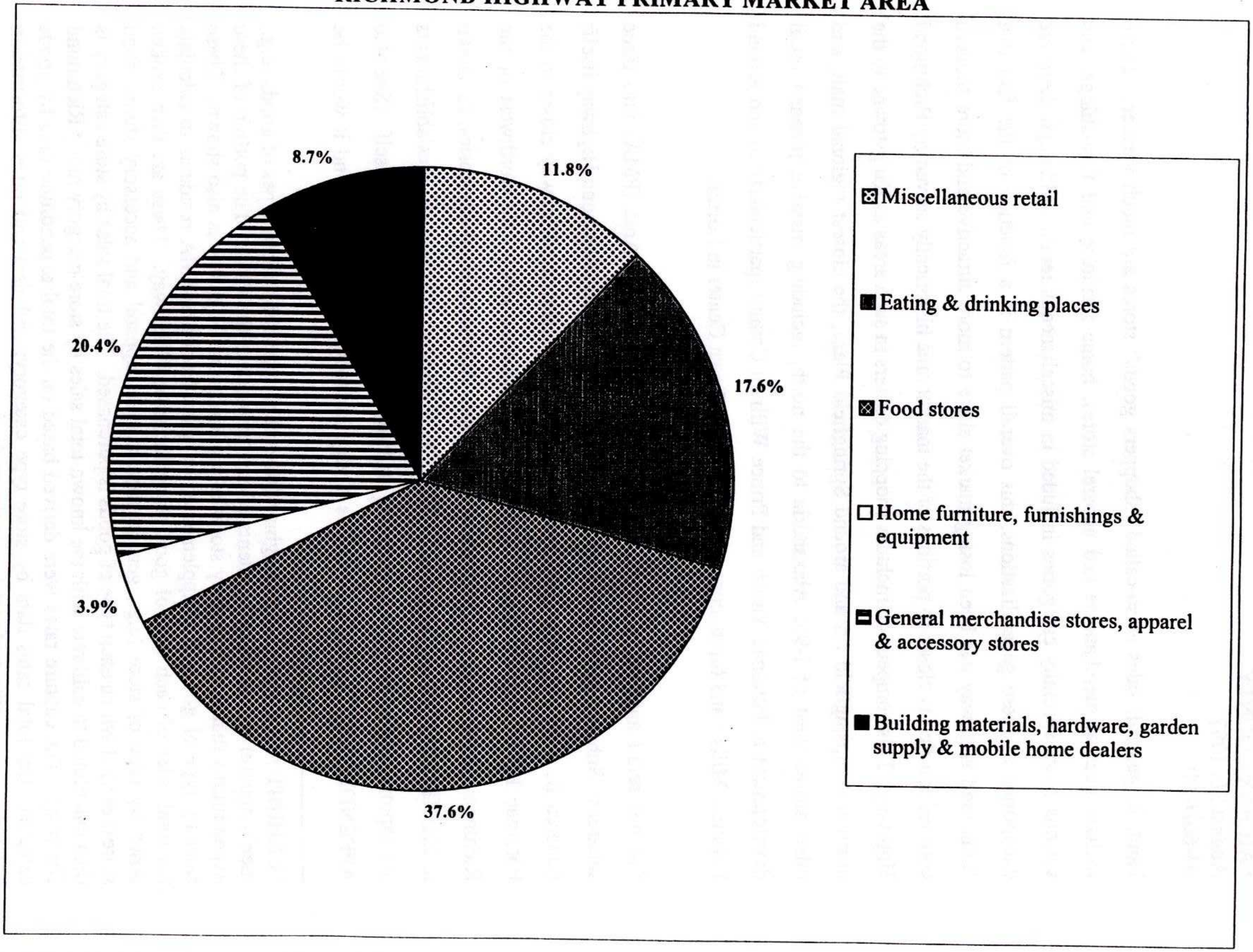


EXHIBIT I-2c
DISTRIBUTION OF RETAIL SALES
RICHMOND HIGHWAY PRIMARY MARKET AREA



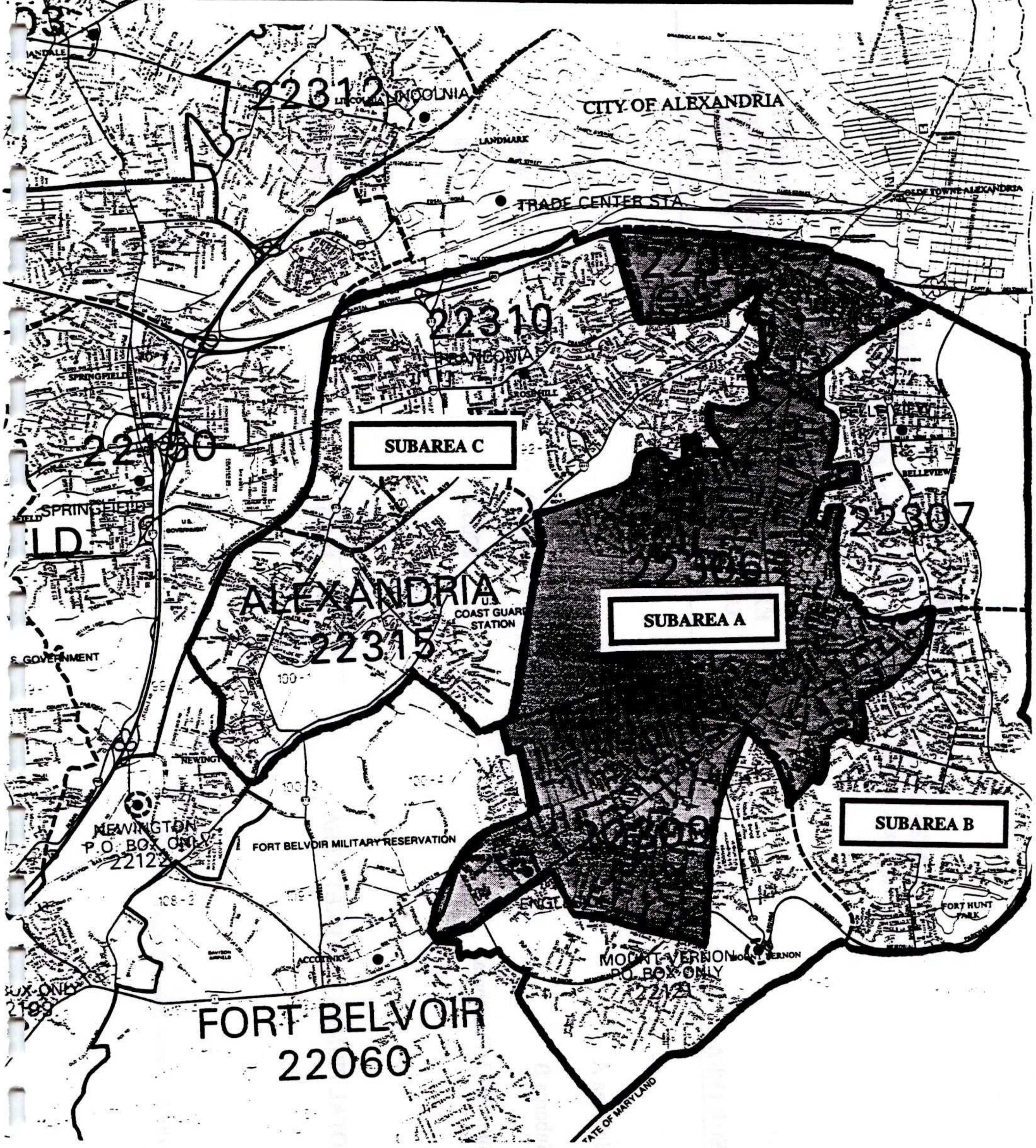
SOURCE: Claritas, Inc.; Robert Charles Lesser & Co.

hand, in general, sales at so-called "shoppers goods" stores are much weaker. These include general merchandise and apparel stores, home furniture and furnishings, and various other specialty categories included in miscellaneous retail. Although there are exceptions to these generalizations, this overall pattern is a function of the fact that Richmond Highway has been losing market share to more attractive and more modern competition that is closer to portions of the market area historically served by Richmond Highway. This competition includes shopping centers in such areas as Kingstowne to the northwest; Springfield (in and around Springfield Plaza, the closest regional mall, and other stores west of I-95; Alexandria to the north, including massive planned retail development at Potomac Yards; and Prince William County (particularly in and around Potomac Mills); and future competition at Lorton Town Center in Lorton.

For our retail analysis, we have divided the Primary Market Area (PMA) into three subareas: Subarea A, which includes the neighborhoods along Richmond Highway itself; Subarea B, which includes the neighborhoods east of Richmond Highway closer to the Potomac River; and Subarea C, which is the Franconia area to the northwest of the Richmond Highway revitalization area (see map). Across all retail categories, as shown in EXHIBIT I-3 and graphed in EXHIBIT I-3a, Richmond Highway retail establishments are capturing fully 69% of expenditures made by residents of Subarea A itself. (See also APPENDIX EXHIBIT A-2.[1]) This is a very impressive capture rate, and it would be

[1] EXHIBIT A-2 is a model that begins with expenditures for various types of goods (e.g., men's apparel and food) by residents of each subarea of the PMA. The portion of these expenditures that is captured by stores along Richmond Highway is also shown. These sales by type of goods are supplemented by sales from non-PMA residents to calculate the total sales of each type of good along Richmond Highway. These are then broken down by type of store (e.g., general merchandise, apparel and accessory stores; food stores; etc.) at which each type of goods is purchased. The total sales by store category is then calculated to calibrate with the known total sales by store category along Richmond Highway. The capture rates were derived based on the total expenditure data by goods category; the total sales data by store type category; and data and other information obtained from a sample of retailers in the study area.

MAP OF RICHMOND HIGHWAY PRIMARY MARKET AREA



Subarea A = US Postal zip codes 22306 and 22303, and census tracts 4160, 4216, 4217 and 4218.

Subarea B = US Postal zip codes 22307 and 22308, and census tracts 4159 and 4160.

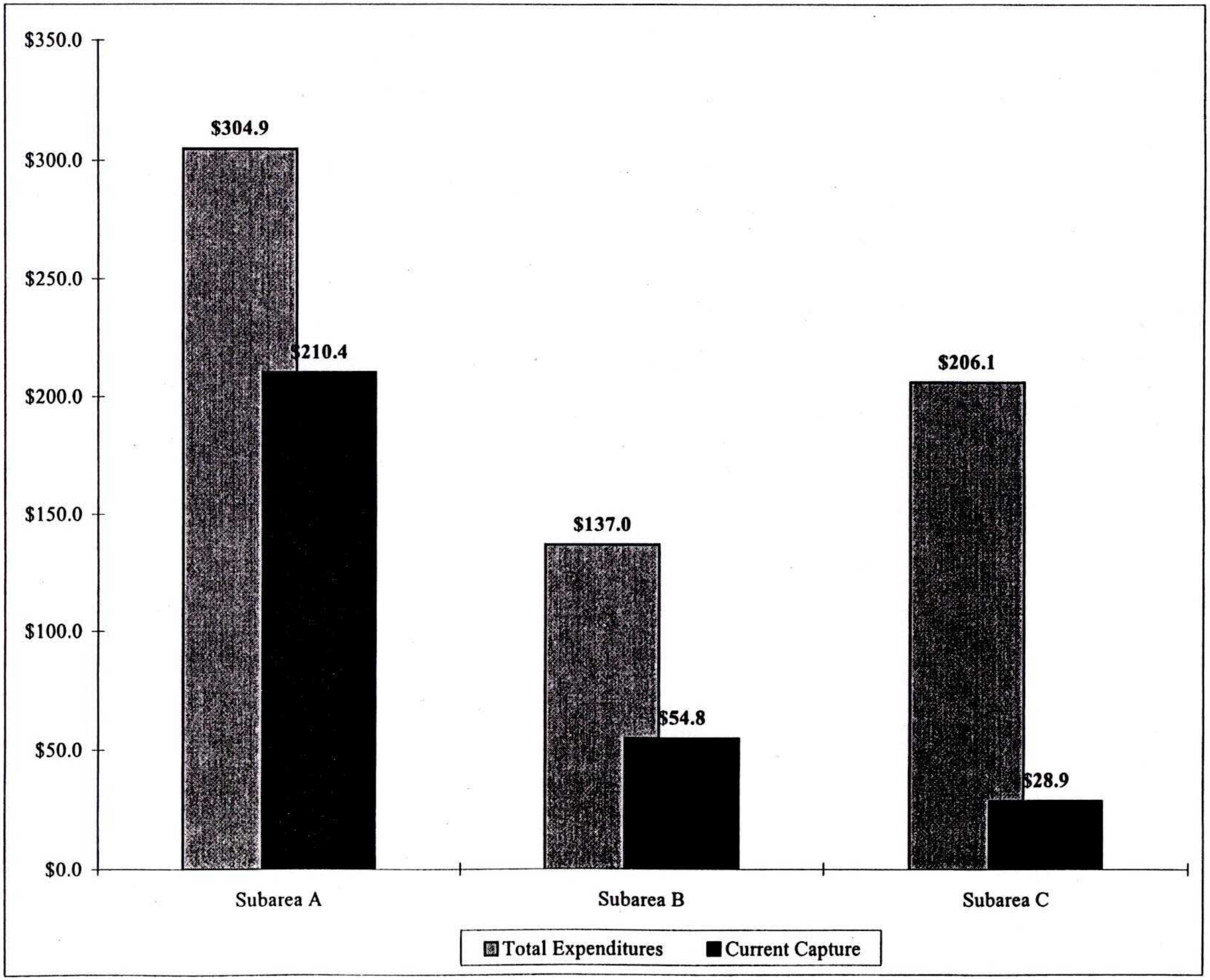
Subarea C = US Postal zip codes 22310 and 22315.

EXHIBIT I-3
CURRENT CAPTURE OF RESIDENT EXPENDITURES
RICHMOND HIGHWAY PRIMARY MARKET AREA

SUBAREA	TOTAL EXPENDITURES OF RESIDENTS (In Millions)	CURRENT RICHMOND HIGHWAY CAPTURE (%)
Subarea A	$304.9	69%
Subarea B	$137.0	40%
Subarea C (Franconia)	$206.1	14%
TOTAL PRIMARY MARKET AREA	$648.0	46%

SOURCE: Claritas; Robert Charles Lesser & Co.

EXHIBIT I-3a
CURRENT CAPTURE OF RESIDENT EXPENDITURES
RICHMOND HIGHWAY PRIMARY MARKET AREA



SOURCE: Claritas, Inc., Robert Charles Lesser & Co.

difficult to improve on it even if there were major upgrading and addition of new stores. Furthermore, total potential expenditures of Subarea A residents are $305 million, 47% of total expenditures of all PMA residents. Residents of Subarea B account for 21% of PMA resident retail expenditures, and Richmond Highway captures 40% of these expenditures. This is not a bad rate, and is probably higher than many in the area would guess, but it should still be possible to increase it with improvements along Richmond Highway. Franconia (Subarea C) residents account for 32% of PMA resident retail expenditures, and Richmond Highway captures only 14% of these expenditures. The much lower capture rate is not surprising given the area's proximity to other retail areas, such as Springfield and Kingstowne, but it could also be improved upon with improvements and new retail towards the northern end of Richmond Highway.

Given this pattern, it is not surprising that convenience establishments that rely more on local business are doing well, while establishments that typically expect to attract shoppers from a wider area are generally performing less well. Another implication of these findings is that Richmond Highway retail sales can only increase significantly if it can capture higher percentages of expenditures from the area closer to the Potomac River (Subarea B) and, if possible, Franconia (Subarea C).

2. Retail Market Trends

Various retail market and demographic trends have contributed to this situation. These include:

- An increasing portion of retail expenditures are being captured by national chains rather than locally owned stores.

- So-called "power centers," with "big box" retailers that include major general merchandise discount stores such as Wal-Mart and Kmart, plus large discount stores that dominate particular categories (so-called "category killers," such as Toys-R-Us, Barnes & Noble, PetsMart, Home Depot, etc.), are expanding rapidly and have captured a larger percentage of retail expenditures.

- Many newer shopping centers have been built that are more attractive than the older centers on Richmond Highway (even with the significant upgrading of many of the Richmond Highway shopping centers), with better visibility and easier access, and minimal concerns about security issues.

- Demographic changes have also affected shopping patterns. EXHIBITS I-4, I-4a and I-4b and Appendix A include data on demographic characteristics of the PMA. The core area (Richmond Highway A and B) is ethnically diverse, with 65.9% of the population white, 18.7% black, 6.5% Asian and 8.6% of Hispanic origin.

Retail market trends also provide some opportunities for Richmond Highway:

- Various improvements in Richmond Highway, and in Richmond Highway retailing, that would make the retailers more competitive with other shopping concentrations would enable it to capture higher percentages of shoppers from Subarea B and to some extent Subarea C.

- The rapid expansion of big box retailers and power centers[2] could present opportunities if the area chose to take advantage of them. As discussed below, the

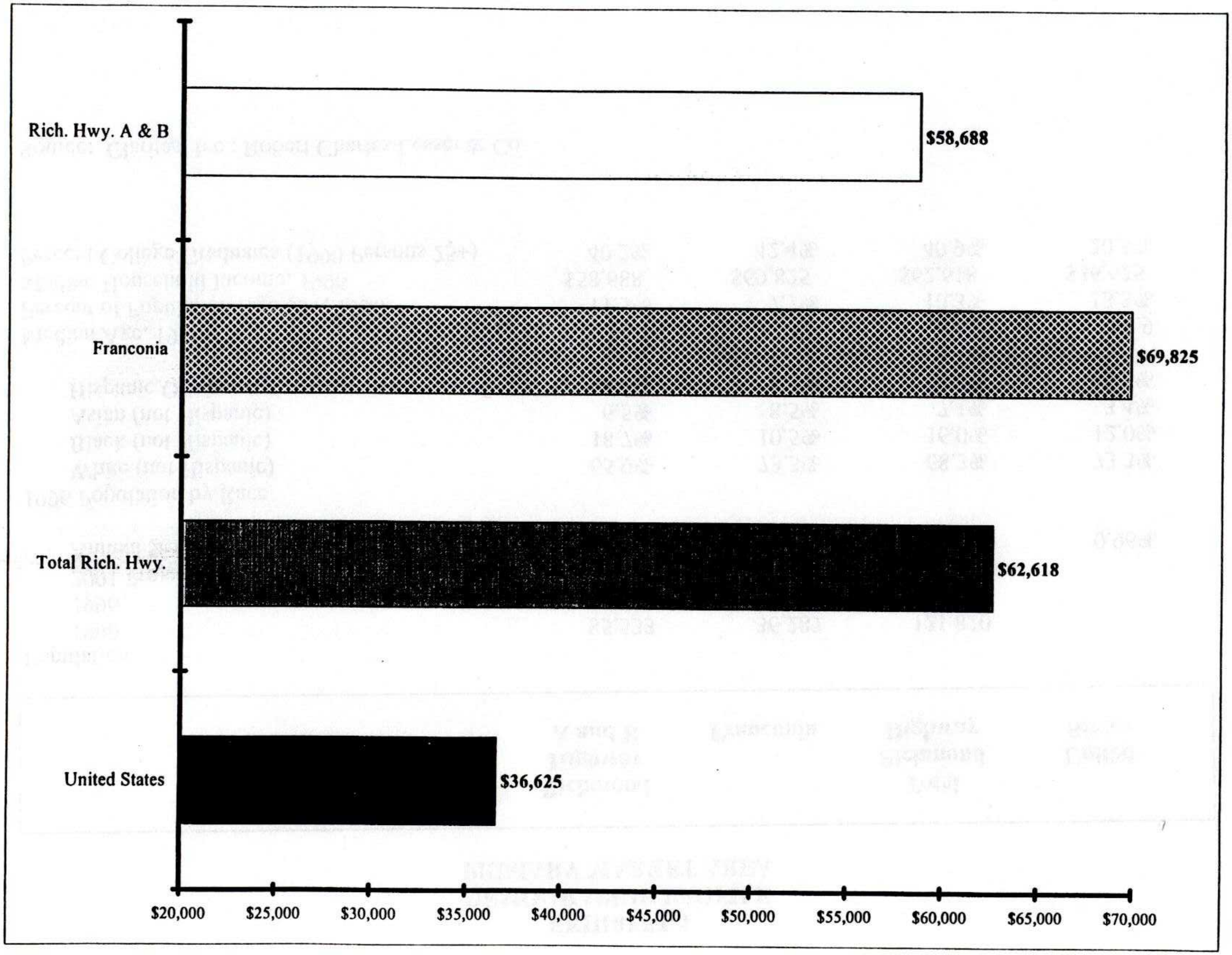
[2] Big box retailers are large discount-oriented national chain stores that are either general merchandise discount stores or specialize in a particular category, such as toys, books,

EXHIBIT I-4
DEMOGRAPHIC PROFILE
PRIMARY MARKET AREA

	Richmond Highway A and B	Franconia	Total Richmond Highway	United States
Population				
1990	85,533	36,287	121,820	
1996	86,940	42,730	129,670	
2001 Projection	89,194	47,593	136,787	
Annual % Change 1996-2001	0.51%	2.18%	1.07%	0.96%
1996 Population by Race				
White (not Hispanic)	65.9%	73.3%	68.3%	73.3%
Black (not Hispanic)	18.7%	10.5%	16.0%	12.0%
Asian (not Hispanic)	6.5%	8.5%	7.1%	3.4%
Hispanic Origin	8.6%	7.3%	8.1%	10.5%
Median Age, 1996	36.7	35.3	36.2	34.9
Percent of Population Age 65+, 1996	11.5%	7.7%	10.3%	13.3%
Median Household Income, 1996	$58,688	$69,825	$62,618	$36,625
Percent College Graduates (1990 Persons 25+)	40.2%	42.4%	40.9%	20.3%

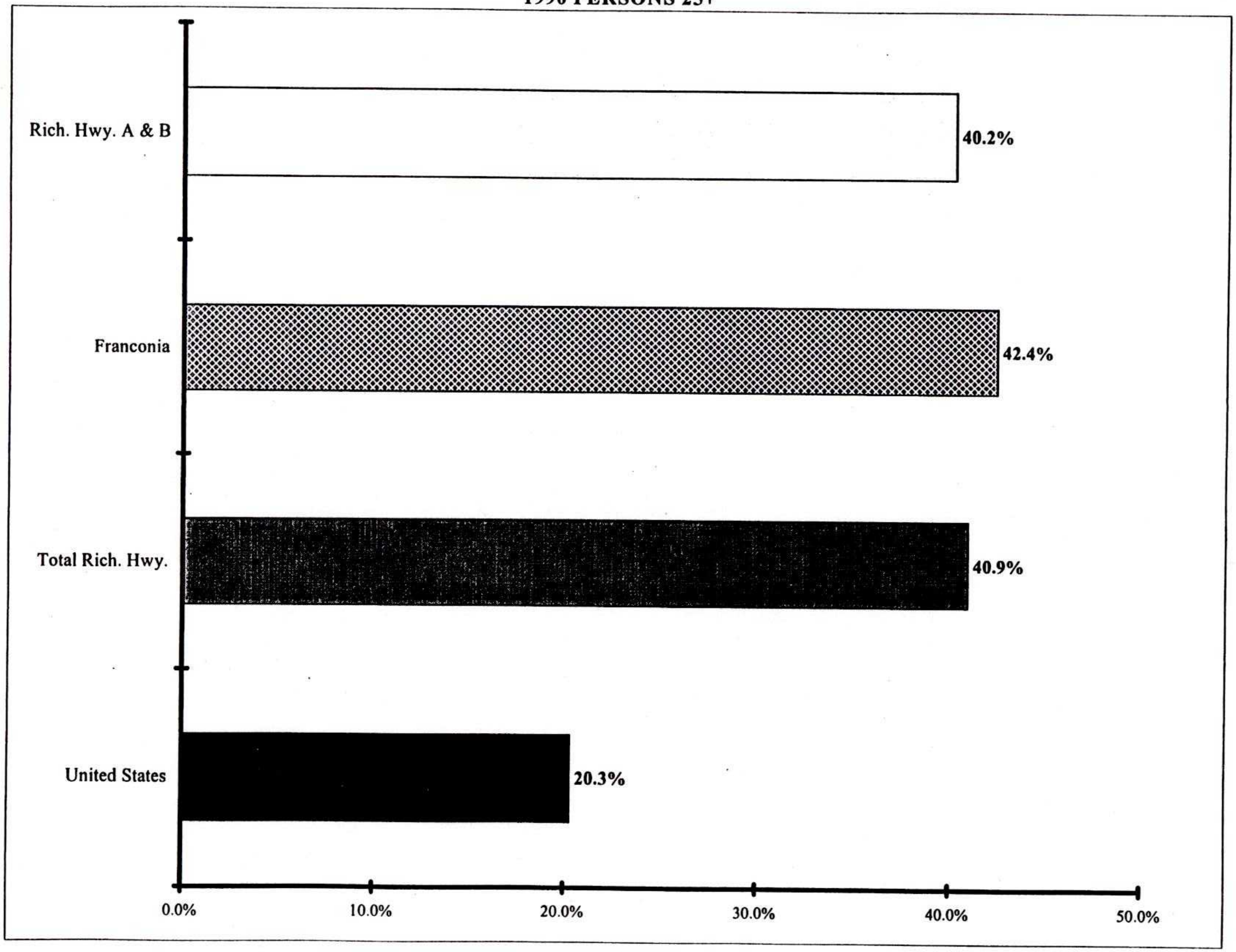
Source: Claritas, Inc.; Robert Charles Lesser & Co.

EXHIBIT I-4a
1996 MEDIAN HOUSEHOLD INCOME



SOURCE: Claritas, Inc.; Robert Charles Lesser & Co.

EXHIBIT I-4b
PERCENT COLLEGE GRADUATES
1990 PERSONS 25+



SOURCE: Claritas, Inc.; Robert Charles Lesser & Co.

consulting team did not find sufficient market support for an entire new power center along Richmond Highway. However, it should be possible to attract desirable national chain retailers, including some big box retailers, to fill vacancies or expand existing centers. Nationwide, there has been more expansion of these stores than is warranted by market demand. However, many of these chains continue to expand, and developers continue to look for sites to accommodate them.

- Although conventional shopping centers (including neighborhood centers anchored by supermarkets, and community and power centers anchored by discount stores) still account for the lion's share of retail sales growth, a reaction of sorts is arising. There is evidence that many people have a desire for a more pedestrian-oriented, traditional shopping, eating and entertainment experience than they can find in conventional shopping centers—even the most attractive new ones with the biggest stores. One company that has attempted to capitalize on this trend is Federal Realty Investment Trust, a major developer that has been involved with many power centers. It is now also actively pursuing opportunities for what it calls "main street retail" in such areas as downtown Bethesda and Shirlington. Inclusion of some of these elements in a new neighborhood center or mixed-use development could provide a competitive edge and attract more shoppers from Subarea B and other areas.

- As shown in the demographic exhibits, the heart of the Richmond Highway PMA (A and B) has a median household income 60% higher than the nation as a whole; almost twice as high a percentage of residents are college graduates.

3. Specific Retail Opportunities Along Richmond Highway

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pet supplies and food, etc. Power centers are shopping centers that are entirely or predominately occupied by big box retailers.

Our retail market analysis, including assessment of the market trends discussed in the previous section, revealed the following opportunities for Richmond Highway:

- A general upgrading of the area, on both private and public property, would improve the competitiveness of Richmond Highway and result in a significant increase in retail sales—an estimated $23.7 million (7.0%) without any change in actual stores. The benefits of this upgrading would be experienced fairly consistently along the entire corridor. Upgrading would include a facelift of existing centers, such as new facades and better landscaping of parking lots, continued public improvements such as streetscape and better signage, and various other actions discussed in the implementation section of this report. The opportunity for increased sales is sufficiently great that it would be economically prudent for shopping center and retail store owners (such as at Woodlawn Shopping Center) to make these types of investments.

- Given the strong sales of the existing supermarket and drug stores, we evaluated the potential for a new neighborhood center anchored by new stores of these types. Our analysis in APPENDIX EXHIBIT A-3 indicated that there would be sufficient support for such a center if it were located north of Beacon Mall and had a tenant mix and design that would be appealing to residents of both Subarea A and Subarea B. This location would be important to enable the center to capture shoppers from both of these subareas. Such a center would probably be about 90,000 square feet and might be anchored by Safeway or Super Fresh. Total retail sales would be an estimated $36 million and rents would be in the low $20s for in-line stores and the high teens for anchors. This center would be particularly desirable if it were integrated with other uses into a mixed-use development with elements of "main street" retailing. (EXHIBIT I-5, at the end of this report, shows an example of how such a design might work on a Richmond Highway site.)

- We also evaluated the potential for a new power center, which would probably have 225,000-275,000 square feet of retail space. As discussed above, this type of retailing is becoming overbuilt nationwide, but we wanted to evaluate whether there would be sufficient support for such a center on Richmond Highway nevertheless. Our analysis in APPENDIX EXHIBIT A-4 determined that there was not sufficient market support for a new center of this type along Richmond Highway, which was consistent with information garnered from our interviews. (Total sales along Richmond Highway would increase, beyond the effects of upgrading, if a power center were developed, but the increase would not be nearly sufficient to support the new center and existing retail space as well.) In particular, the new power center being built at Potomac Yards in Alexandria will discourage many major retailers from locating another store on Richmond Highway. However, some power anchors are interested in locating along Richmond Highway. This combination bodes well for filling large vacancies as they may occur, or potentially expanding existing centers by adding additional "power anchors".

- Despite somewhat lackluster sales at some stores, our interviews determined that existing shopping centers along Richmond Highway are performing sufficiently well in terms of occupancy rates and rents that the owners are not motivated to make major changes that would be more expensive than the facelift and landscaping improvements discussed above. Such major revitalization and reconfiguration of existing centers has been very successful elsewhere in the Washington area, such as on Rockville Pike, at shopping centers such as "Montrose Crossing" where construction of a privately funded parking facility is allowing infill development within some of the area formerly devoted to surface parking. The result, being billed as "Main Street, USA," while perhaps not delivering Main Street as advertised, is certainly a first step at achieving a livelier shopping and people watching experience.

A more ambitious project is being undertaken in the heart of Rockville, where repeated attempts at revitalizing a failing shopping mall have been abandoned, and a long range effort to replace the project with a mixed-use, pedestrian friendly town center is underway. We foresee that market forces may tend to encourage some major reconfiguration to occur in the longer-term future along Richmond Highway. However, in the absence of significant incentives, we do not believe it is likely to occur in the shorter term along Richmond Highway. As discussed in the implementation section, incentives to encourage such revitalization (e.g., at the centers in Hybla Valley) would be valuable for the long-term viability of the area.

- **Our interviews also revealed that there also continues to be strong interest on the part of freestanding restaurants and other stores, particularly highway-oriented establishments, in locating along Richmond Highway. This offers the opportunity to upgrade specific smaller sites that may currently be underused.**

B. Entertainment Opportunities

- **In addition to the neighborhood center and free-standing stores and restaurants discussed above, there is potential for a restaurant neighborhood along Richmond Highway. This would be on the order of 20,000-40,000 square feet, with four to six restaurants with shared parking and the opportunity to walk among them in a pleasant environment.**

- **The past few years have seen dramatic changes in the types of entertainment development that have been created in many locations around the country. To date, the Washington area has actually had relatively little of this type of development. Given the population density in the Richmond Highway PMA, and the absence of competition, there would be sufficient support for a family entertainment center,** which is a conglomeration of indoor and outside attractions such as video games, miniature golf, bumper cars, batting cages, roller skating rink, etc. Some family entertainment centers have high tech "virtual reality" and "motion simulation" attractions that use computers and other high technology to simulate racing, roller coasters, fighting, etc. However, the Commercial Revitalization Advisory Group was not enthusiastic about such a use, which would probably require 7-10 acres.

- As discussed below, we predict that at least in the mid-term there will be a moderately strong market opportunity for a family inn as a complement to Mt. Vernon and Woodlawn Plantation. The Washington area is a major destination for family tourists, but it is surprisingly lacking in attractions that children are truly enthusiastic about. This inn would be most likely to succeed if it caters to families with children by including entertainment components that appeal to children while remaining consistent to an historical theme.

- Various entertainment uses that would most likely require public sponsorship would be very beneficial to Richmond Highway. These uses might include a community theater, a community center (perhaps with an arts focus) and/or a museum. One or more of these uses might become possible with strong community support and organizational commitment, County assistance, and perhaps developer proffers in conjunction with new development or redevelopment.

C. Office Opportunities

In some ways, this is an opportune time to be considering office development possibilities for Richmond Highway. The office market has become very tight in Northern Virginia, and nearby Eisenhower Valley has benefited from this trend (see APPENDIX EXHIBITS A-5 and A-6). It is also possible that the U.S. Patent and

Trademark Office will relocate from Crystal City to Eisenhower Valley, which would create spin-off opportunities for Richmond Highway.

It is certainly possible that a particular company, organization or agency might choose to locate in a "build-to-suit" office building along Richmond Highway, as Metrocall did many years ago. The area is attractive to office users because of its proximity to the Beltway, National Airport and the Huntington Metro station; and the convenience to an executive housing concentration close to the Potomac River.

However, there is by no means any assurance that a build-to-suit opportunity will come to Richmond Highway. The other office alternative is that a developer would proceed with a "speculative" office building, without already having a user committed for the building. This was, of course, a common phenomenon in the mid-1980s, but it contributed to record overbuilding of office buildings and many property foreclosures. As a result, developers and lenders are still very conservative about proceeding with "speculative" office buildings. Several have been announced, and a few have actually been started, in the Washington metropolitan area, but they are still highly unusual. They have to date been limited to either downtown or the "favored quarter" extending west and northwest from downtown, from Rosslyn out along the Dulles Access Road (including Tysons Corner and Reston); I-66 (including Fair Oaks); and I-270. All are in established concentrations of office activity known as "edge cities" or "metro cores." Richmond Highway is not in the favored quarter, although it is not as far from it as some other parts of the metropolitan area, and it is not an established metro core.

Unless sufficient incentives were made available to provide a significant rent differential under more desirable locations, we have concluded that there is no opportunity for a <u>mid-rise or high-rise office building</u> for the next five years, and only a low market opportunity in the mid-term. Current office rents along Richmond Highway are \$15-\$18 per square foot for the newest buildings. If a new building were developed without incentives, rents would probably have to be $20 per square foot. If incentives made it possible to rent space for $16-$18 per square foot, in the northern one-third of Richmond Highway, we estimate that there would be demand for 50,000-70,000 square feet of space. Such a building would have to be in the northern portion of Richmond Highway to benefit at least to some extent from proximity to the Beltway, the Huntington Metro station and existing office concentrations. However, it would still be difficult to attract a developer for a speculative building.

One thing that might make development of private office space more likely would be to combine new such space with a new Fairfax County government center. The County has a short-term need for approximately 100,000 square feet along Richmond Highway. A lease for this space could serve as an "anchor" or preleasing for a larger development.

There is also a large gap between current rents for low-rise, local serving office space and the rents that would be required for new construction in the absence of incentives. Current rents along Richmond Highway are only $10-$12 per square foot, while rents of $15-$16 per square foot would be required for new construction in the absence of incentives. If incentives could fill this gap, this space would be appealing to doctors, insurance agents, accountants, real estate agents, mortgage companies, financial advisors and others serving the area surrounding Richmond Highway. If the rent gap could be filled, there would be demand for 10,000 square feet of such space every three years.

The other opportunity along Richmond arises from the fact that Mt. Vernon Hospital has become world-renowned for rehabilitation medicine. The hospital's space needs can currently be accommodated on its own campus, but in the mid-term there should be a moderate opportunity for a new satellite rehabilitation center near the hospital along Richmond Highway.

D. Hotel/Tourism Opportunities

A number of national chains of so-called extended stay hotels are actively looking to expand in various parts of the Washington area. This industry is showing signs of becoming overbuilt nationally, so this opportunity may decline over time, but there is currently great interest in building such hotels at the northern end of Richmond Highway. This area offers excellent accessibility to major office concentrations in Crystal City and Alexandria (most people staying at extended stay hotels commute to office locations within about 10 minutes). Such a hotel would probably require a 3-5 acre site.

It would be highly desirable to attract a new County visitor center to Richmond Highway. However, it appears that it is more likely that such a center will be located along I-95 in Lorton. Nevertheless, a center oriented to the specific history of Mt. Vernon, Woodlawn Plantation, Gum Springs, etc. would still be an asset for the area.

At least over the mid-term, and potentially sooner, there is a moderately strong opportunity for a family inn with restaurant and conference facilities towards the southern end of Richmond Highway with direct access to Mt. Vernon, as discussed in the entertainment section above. Such a facility could benefit from demand from tourists visiting the Washington area; Ft. Belvoir; and meetings organized by associations concentrated in Alexandria.

E. Residential

Our interviews and research on currently selling residential developments in the greater Richmond Highway area indicate that there will be considerable potential for various types of additional residential development along Richmond Highway (see APPENDIX EXHIBITS A-7 and A-8).

- There is demand for a total of up to 240 market-rate condominium units, with annual sales of 48-60. These units would have current base prices ranging from $100,000-$125,000 and would generally serve buyers with household incomes of $40,000-$50,000. For the foreseeable future, these are likely to be low-rise units with surface parking, typically attracting singles and couples with few children.

- There is also an opportunity for market-rate attached homes, with annual sales of 24-48 units. These units would have current base prices ranging from $130,000-$150,000 and would generally serve buyers with household incomes of $50,000-$60,000, often with young children.

- The area surrounding Richmond Highway has a large older population, typically living in large single-family homes that may no longer be optimal or even suitable as the households age. This creates an opportunity for market-rate small lot single-family homes; these could achieve annual sales of 18-30 units. These units would have current base prices ranging from $150,000-$180,000 and should be located off Richmond Highway with direct access from single-family residential areas.

- The large older population also creates an opportunity for seniors rental apartments: 60 units as soon as possible and 60 additional units three years later. These would most likely be developed by the Fairfax County Redevelopment and Housing Authority using Federal tax credits, with monthly rents ranging from $515-$720.

- Finally, over the mid-term, there will be a moderately strong market opportunity for market-rate rental apartments along Richmond Highway. In today's dollars, rents would be $800-$1,200, and minimum incomes would be $32,000-$48,000. There is little interest in such housing on the part of developers at the present time, however. In general, the Commercial Revitalization Advisory Group was not particularly enthusiastic about garden apartments along Richmond Highway. However, the Commercial Revitalization Advisory Group was interested in higher density development of various types, and would be interested in attracting high-rise luxury apartments to key nodes. This product type is, however, very difficult to justify financially except at Metro stations or downtown.

In general, there was considerable controversy at Commercial Revitalization Advisory Group meetings about the desirability of encouraging or permitting more housing along Richmond Highway, given the fact that the Richmond Highway area currently has higher percentages of assisted housing units (particularly Section 8 vouchers and certificates) than other parts of the county. There was also concern by some people attending Commercial Revitalization Advisory Group meetings that even new market-rate housing will soon degenerate into undesirable housing.

Reasonable people can differ about this highly controversial topic. The consulting team's analysis of the situation led to the following findings and recommendations:

- The fact that some housing—even relatively new market-rate housing—along Richmond Highway has deteriorated is a function of the poor image of the area and the whole range of problems facing Richmond Highway. If revitalization efforts succeed in turning around the downward image cycle, there is no reason that new housing will not attract buyers who subsequently want to buy more expensive homes in the area; and their homes will be demanded by other households that want to move to a desirable community.

- If the market functions as it should, the presence of more households will provide more nearby market support for existing retailers and encourage property owners and retailers to fix up their properties.

- Because of the controversy over the desirability of more housing, incentives (which will be scarce) should generally be used for housing developments in locations where housing would be a clear improvement over current use (e.g., blighted motel properties). Where possible, incentives should be used to favor mixed-use projects or neighborhood centers (in which there may be multiple land owners cooperating on an area wide plan) that include housing as a critical component of a 24-hour complement of activities. New housing might also be encouraged if a higher than usual percentage of the site is preserved as green space, which would encourage the types of higher rise apartments preferred by the Commercial Revitalization Advisory Group.

- On other sites, housing for which there is a market, as described above, should be permitted but not specifically incentivized. The consulting team believes that housing on such sites should not be discouraged, because on balance it will be positive for the area, but it should not benefit from scarce incentives which could be more valuable on other sites and/or for other uses. It must be recognized, however, that there will be numerous sites along Richmond Highway where housing is the only viable type of new development for the foreseeable future. Discouraging new housing on these sites may resign them to no improvement for many years.

- No new project-based assisted housing units should be developed along Richmond Highway.

- **Buyers of affordable dwelling units (ADUs) are not low-income households of the type that have become so controversial along Richmond Highway; townhome ADUs are generally priced between $95,000 and $110,000, and condominium ADUs are generally priced between $65,000 and $75,000. However, the likely presence of ADUs is seen as a distinct negative by those who oppose more housing along Richmond Highway. We would encourage the review of ADU requirements to encourage those building along Richmond Highway to consider contributing to the housing fund rather than building ADUs on their properties.**

8. High-Tech/Research & Development Opportunities

Over the mid-term, our interviews and evaluation indicated that there will be a moderately strong market opportunity for high-tech/research & development/light assembly space, particularly towards the southern end of Richmond Highway. In this area, it may well be possible to attract companies that want to be relatively close to I-95 and/or Ft. Belvoir; and want to tap into the labor force in and along Richmond Highway.

II. TRANSPORTATION AND PLANNING EVALUATION

A. Transportation Evaluation

The major transportation facility in this study area is Richmond Highway (U.S. Route 1). This roadway is oriented north-south and extends from the 14th Street Bridge into the District of Columbia, Crystal City, and Old Town Alexandria on the north to Lorton, Woodbridge, Fredericksburg, and Richmond on the south. Richmond Highway has an interchange with the Capital Beltway (I-95/495) immediately north of the study area.

The Huntington Metrorail station is located along Kings Highway approximately 0.8 miles north of its intersection with Richmond Highway.

There are several major intersections that provide access from surrounding residential areas to Richmond Highway. They include Huntington Avenue, Kings Highway, Beacon Hill Road, Lockheed Boulevard, Sherwood Hall Lane, Buckman Road/Mount Vernon Highway, and Mount Vernon Memorial Highway. Other roadways also provide vehicular access between surrounding residential communities and Richmond Highway.

Richmond Highway has a varied cross-section. The portion of the highway north of its intersection with Buckman Road/Mount Vernon Highway has a six-lane divided cross-section with traffic signals at key intersections. There are also numerous unsignalized median breaks. The portion south of Buckman Road/Mount Vernon Highway is undivided with a mixture of a five-lane cross-section with the center lane used for two-way left turns and a four-lane cross-section with no left turn lanes except at intersections.

Along the entire length of Richmond Highway, there are scattered locations that have frontage roads. There are also locations where access drives serving the properties are well defined and other locations where there are no access controls. The presence and absence of access controls is dependent on the age of the development. Traffic along Richmond Highway flows reasonably well, especially in the northern portion with the six-lane, divided cross-section. The southern portion with the undivided cross-section experiences some flow and safety problems. This is a result of the lack of protection for left turn movements and the locations of uncontrolled access.

There are locations where vehicular access can be confusing and sometimes dangerous. The mix of sections with and without frontage roads, the varying of frontage road configurations, and the presence and absence of access controls results in confusion.

VDOT has undertaken the Route 1 Corridor Study extending through Fairfax and Prince William Counties, including the revitalization study area. There are various alternatives for widening Richmond Highway and providing a median. The uncontrolled access to properties would be eliminated. The purpose of the study is to identify and address current and future transportation needs in the corridor through the year 2020. There are currently no funds for implementing any improvements that may be recommended from this study.

The revitalization consultant team is working with the VDOT consultant team to coordinate the two studies and to assure that any future improvements to Richmond Highway are consistent with the goals of the revitalization effort.

B. Planning Evaluation

1. Assets

With access from the Capital Beltway and proximity to National Airport (only five miles away) and Washington, D.C., only seven miles away, Richmond Highway is seemingly well positioned to benefit from the strong economy of the Washington Metropolitan area. 83,000 vehicles travel Richmond Highway each day at Huntington, tapering to 67,500 at Hybla Valley and 43,000 at Woodlawn. These numbers are supplemented by traffic at the nearby Huntington Metro Station, and 80 bus stops along the route.

Added to those assets is a highly educated surrounding community with a 1996 median household income of $58,688 (63% above the U.S. median). The nearby tourist attractions of Mt. Vernon and Woodlawn Plantation at the southern end of the highway as well as the private amenities of Belle Haven and Woodlawn Country Clubs bring additional traffic to the area, as does Mt. Vernon Hospital, which has a nationally prominent hip replacement surgical center.

Richmond Highway represents a tremendous investment in both public and private resources. In recent years, $650,000 has been invested in bond projects along Richmond Highway, mostly in the form of landscape improvements (tree planting) as well as some planned bus shelters. An additional $400 million in private money has been invested in the last eleven years, according to the Southeast Fairfax Development Corporation (SFDC). A concurrent study being undertaken on behalf of VDOT is looking at even more public investment on Richmond Highway--possibly widening it still further to accommodate expected growth in the region.

Clearly, this investment has not been sufficient to transform the image and economic status of the revitalization area. It is, however, prudent for the County to leverage this investment to the maximum extent possible, possibly by striving to direct a higher proportion of growth expected in the County to this area and other revitalization areas, while preserving those areas of the county not yet developed. For that strategy to be effective, however, the physical form of that investment, i.e., the quality and arrangement of the new construction, must be consistent with the goals already articulated by the County in its Comprehensive Plan

2. Liabilities

Route 1--Richmond Highway--is ugly. Its image in the mind of many would-be investors is one of cheap motels catering to the tourists who once traveled this route on their way to Florida, discount stores, auto dealers, fast food restaurants and relatively low-quality and, in some cases, poorly maintained apartments. While some of this may be attributable to the age of many of the structures, even some of the recent development cited above does nothing to alleviate that image and may, in some cases, exacerbate it.

Comprised primarily of shallow, small parcels of land that are zoned either C-8 or are bisected by differing zoning classifications (as opposed to mixed-use zoning), it is difficult to orchestrate a substantive redevelopment anywhere along the corridor. Furthermore, if large parcels could be assembled, the predominance of a zoning classification designed "for those commercial and service uses which are oriented to the automobile"; one that precludes the mixing of such diverse uses as retail with housing or office with housing; one that makes office use at greater than 50% of the permitted F.A.R. a special exception, resulting in added expense to the developer, and precludes office use at greater than 75% altogether; one that makes "quasi-public parks" or other public spaces a special exception, that mandates front yard set backs of at least 40-feet, and whose performance characteristics ignore the urban design of a project, perpetuates a pattern of development which is, generally speaking, ugly, wasteful of land, auto-dependent and antithetical to the development of vital community life.

For example, the normal consumption patterns of a resident of the nearby area, which might typically involve a series of errands at a variety of services and merchants along a two to three mile stretch of the highway, involve getting in and out of the car, and on and off Richmond Highway several times within a short period of time. If those activities are taking place in the morning or late afternoon, those trips are overlapping those of other drivers using Richmond Highway-to commute to and from work. Moving on and off the highway to reach local businesses conflicts with through traffic, particularly when cars make mid-block left turns from the middle of the highway. Because of the large number of high turnover uses along Richmond Highway, e.g., fast food restaurants and gas stations, such conflicts are exacerbated.

Furthermore, having to drive to every destination diminishes the opportunity for serendipitous encounters, for chance meetings that have made traditional towns such good centers of community life as well as good business locations: the ability to shop or run errands easily on one's way to work, the likelihood of meeting an acquaintance at lunch, the ease of setting up a meeting or a play date at short notice. Moreover, the high ratio of parking lots to buildings prevalent on Richmond, and the great distances across these lots as well as across Richmond Highway itself, raise infrastructure costs (on a per square foot basis), waste land, and create further disincentives to walking, while making it virtually impossible to create any kind of urban ensemble or coherent design for buildings, spaces or even signage. Because such patterns are unwalkable and are difficult to service with public transportation, their development has resulted in a vicious cycle of sprawl -- new development is required to replicate this dispersed pattern in order to accommodate still more parking, required because of existing distances that are too great, *ad nauseum.*

The auto-oriented zoning along Richmond Highway is a very significant liability, but it is hardly the only one. The lack of significant east-west access to the highway diminishes its market, isolating it along the eastern edge of the county (although with the current mix of stores better access to the west would probably increase leakage out to newer shopping centers in areas such as Kingstowne). Attempts at connecting Lockheed Boulevard to the west were unsuccessful, so there seems little chance of improving these linkages in the future.

Crime, whether real or perceived, is considered a deterrent to many shoppers, and hence many developers. Some debate exists as to whether crime in this area is actually substantially higher than in other areas of the County, but perceptions are not easily changed.

Environmental constraints are also a factor along Richmond Highway. Marine clays dominate much of the soils (see the discussion of North Hill below), while steep slopes make development of the few remaining undeveloped parcels next to impossible. Furthermore, contamination of Dogue Creek and Huntley Meadows may ultimately lead to remediation efforts, further reducing the development potential of certain parcels.

Redevelopment along Richmond Highway is an expensive proposition. Land assembly alone is an arduous and expensive process, and construction within developed areas has additional costs. This is exacerbated by the development review process required by Fairfax County, which is perceived as cumbersome and overly bureaucratic. Despite all of these disadvantages, there are no incentives offered by Fairfax County for redevelopment in this area. Thus, it is easier and cheaper for a would-be developer or investor to acquire and develop "greenfield" parcels elsewhere in the county or in other jurisdictions than to take on a project along Richmond Highway.

3. Additional Considerations

a. Comprehensive Plan

In an effort to encourage a nodal redevelopment, the Fairfax County Comprehensive Plan identifies five Community Business Centers (CBCs) along Richmond Highway that are intended to "provide community-serving commercial and residential uses as well as serving as focal points in the community." They are: North Gateway, Penn Daw, Beacon/Groveton, Hybla Valley/Gum Springs, and Woodlawn. (See EXHIBIT II-1, Community Centers, at the end of this report.) Areas between these CBCs are classified as Suburban Neighborhoods. While these development nodes acknowledge an existing pattern of development, they are not necessarily sized to acknowledge a reasonable walkable distance, nor are they spaced in the most effective manner (e.g., at critical intersections, or at a distance that might be efficient for light rail or high-speed feeder bus service). For example, there is a 2 - 1/2 mile stretch between the Hybla Valley/Gum Springs CBC and the Woodlawn CBC where there are no CBCs.

The intent of designating these nodes for high density, mixed-use pedestrian friendly development is laudable, and indeed necessary for long-term revitalization to take hold. In particular, the mixing of housing with both retail and office space, if not in the same building, then on adjacent but connected properties is a critical component of pedestrian friendly, 24-hour environments. Such mixing provides a built-in population of people who are likely to walk to services in the immediate vicinity, thus signaling that it is "normal" to be walking in such environments. Furthermore, the presence of housing within these environments provides an easy transition to the established residential neighborhoods behind, making the interconnecting of such neighborhoods with new developments along Richmond Highway an achievable objective.

Unfortunately, the comprehensive plan offers little in the way of real incentive to achieve its goal. The demarcation of CBCs into sub-districts that vary in allowable density and height perpetuates consideration of these pieces as individual development sites, rather than as parts of a whole. Densities are still relatively low, for example 0.35 F.A.R. is typical, and even the higher densities of 0.5 F.A.R. allowed at some of these locations are unlikely to provide the development incentive and the critical mass and mixture of housing and office space to produce the kind of environment sought in the Comprehensive Plan.

Furthermore, owing to the current zoning which does not allow development that mixes commercial (retail or office) uses with housing by right, a prospective developer is still required to go through a cumbersome process of rezoning, even though such a development is consistent with the Comprehensive Plan. Theoretically, the "PD" Zoning classification, in all of its permutations, is intended to satisfy the need for mixed-use development. However, a developer wishing to develop property in conformance with the letter and the spirit of the Comprehensive Plan is forced to go through a rezoning process which includes at least two stages of approval over and above the normal Site Plan approval process: Conceptual Development Plan Approval and Final Development Plan Approval. This process is both a time consuming and costly process in order to achieve an outcome that would have been possible by right had an "MX" type zoning been in place.

An obvious result of such a deterrent, especially along Richmond Highway, is that developers are only likely to propose those projects that can be constructed as a matter of right, even though such projects may be inconsistent with the Comprehensive Plan.

Another immediate effect of this condition is reflected in the inability of the Economic Development Authority to market Richmond Highway for such mixed-use development, as the Authority cannot market any area or property for any use not currently permitted as a matter of right under existing zoning. Thus, because the process itself is so burdensome, the benefits that might accrue to the residents of the Richmond Highway area as a result of such a rezoning to a "PD" classification are unlikely to materialize.

Also of concern, under the 100,000 square foot gross floor area minimum for free standing PD districts, small parcels (of which Richmond Highway is filled) are effectively ineligible for rezoning. While it is theoretically possible, and indeed it would be desirable, for a group of land owners of contiguous small parcels to act in concert to achieve rezoning to PD classification, it is difficult to imagine them doing so without some encouragement and assistance from the County.

Meanwhile, parking requirements, another obstacle to achieving the type of redevelopment sought, remain the same despite zoning ordinance amendments intended to provide some relief. While theoretically, under Section 11-102, Paragraph 6 of the Zoning Ordinance, the Board now has the discretion to waive the requirement that, within designated CBCs, all required parking be on the same or on a contiguous lot, the criteria for receiving such a waiver are onerous if not impossible to meet. For example the developer must:

- Apply to the Director, showing that it is impractical to meet the requirement (thus placing an additional burden on the developer);

- Pay the County a sum for each space eliminated (reducing still further any incentive gained from this waiver); and finally

- Relief through this waiver will only be granted if the County has plans for the erection of a public parking facility in the immediate area and has provided for its development. As the county, has no track record of developing such facilities and has no current plans to do so, the entire provision is moot.

Additionally, the Comprehensive Plan, like those studies that have come before, speaks to the need to protect adjacent residential neighborhoods and to screen them from objectionable views and noise. With the exception of a discussion of tapering the building heights, there is little in the Comprehensive Plan or in any of the preceding recommendations that describes how one might connect these neighborhoods to new development, to integrate them into a larger neighborhood center. The result of all of this protection over the years has been to disconnect the adjacent neighborhoods from their commercial centers, further reducing the vitality along Richmond Highway.

Finally, the "Suburban Neighborhoods," the areas in between the CBCs as designated in the Comprehensive Plan, have not been fully considered. While the Comprehensive Plan spells out a land use and density for every parcel, and even goes so far as to foresee a change in use from the freestanding strip commercial development that currently dominates these areas to moderate densities of housing, it contains no additional vision;. Nowhere is the concept of "livable streets" suggested as an important component of community life. Density alone is not enough to assure pedestrian friendliness, vitality and a sense of community. Recent housing developments along Richmond Highway, and additional proposals in the pipeline, such as at the Mt. Vee property, all share tendencies which work against these characteristics. Garden apartments surrounded by parking lots, and townhouse development accessed at only one point and ending in cul-de-sacs whose units are dominated by front loaded garages or parking lots, do not encourage walking or community participation. Neighborhood services and retail, are, for the most part, zoned out of such neighborhoods, and where they are adjacent, interparcel discontinuity between housing and retail is generally encouraged in the Comprehensive Plan, further discouraging a pedestrian orientation.

b. Parcel Size

It is commonly held that predominance of "small parcels" (a term used by several CRAG members) up and down the length of Richmond Highway is a barrier to revitalization. To be sure, a substantial number of properties are smaller than four acres. Nonetheless, 26 individual properties (or contiguous properties under one ownership) are 4-8 acres (large enough for a supermarket), and 22 properties are greater than eight acres in area. (See EXHIBIT II-2, Existing Parcel Size, at the end of this report.) While together these constitute less than one-half of the land within the Richmond Highway revitalization area, and less than one-fourth of the total number of individual parcels, the combination of large holdings in key locations, including the area around the intersection of Kings Highway at Richmond Highway, Beacon Mall, North Hill, and Hybla Valley, as well as the Future Farmers of America site and the Engleside Shopping Center, suggest opportunities for revitalization and redevelopment that could be accomplished without substantial land assembly.

c. Vacant, Blighted and Underutilized Properties

Roughly 60 or so properties can be classified as vacant, blighted and underutilized (eight properties have been officially classified as blighted), while there are roughly 10 more that are approaching one of these conditions. For the purposes of this study, "underutilized" properties are those that are nearly undeveloped, or developed at a level substantially below that for which they have been zoned (less than 33% of allowable F.A.R.), or structures that are partially or entirely vacant. While several of these are substantial tracts, taken *en masse* they constitute less than one-fourth of the total land within the study area. However, many of these parcels are in key locations along the highway, such as Kings Highway at Richmond Highway, Beacon Mall, North Hill, and Hybla Valley, as well as the Future Farmers of America site and Smitty's Lumber, and as such represent valuable assets in considering a revitalization or redevelopment strategy. (See EXHIBIT II-3, Underutilized and Blighted Properties, at the end of this report.)

d. Assemblage Possibilities

The Fairfax County Comprehensive Plan and SFDC have identified a wish list of land assemblages allowing substantial redevelopment to take place in key locations. This study is supportive of such efforts. However, in order to achieve at least the beginning of redevelopment, it is useful to prioritize the required assemblages at each key location, suggesting that not all lands need to be acquired in order for redevelopment at key sites to commence. The accompanying diagram illustrates the priorities that should be established, categorizing them as to primary (required assembly for anything to be developed), secondary (would be extremely helpful, but not absolutely essential), and tertiary (would be nice to acquire, but development should not be held up if these properties prove to be expensive or unavailable). (See EXHIBIT II-4, Parcel Assemblage Possibilities, at the end of this report.)

III. RICHMOND HIGHWAY REVITALIZATION GOALS

Throughout the process of meetings with the Commercial Revitalization Advisory Group, there was considerable discussion about revitalization goals for Richmond Highway. Based upon this discussion and the consulting team's assessment of the needs for the area, the following goals were devised. These were accepted without change by the Commercial Revitalization Advisory Group.

The overriding goal should be to:

Build on progress that has been made to date to break the cycle of decline and dramatically improve the image of the Richmond Highway revitalization area

The following are important goals in their own right and will help to achieve the overriding goal:

- Foster prosperity of existing Richmond Highway businesses
- Attract more businesses providing good jobs
- Improve transportation by all means within and to the area
- Make the area pedestrian friendly
- Improve the physical environment and appearance of the area
- Promote revitalization and redevelopment activities consistent with improving the image and prosperity of the area

• Enhance the security and welfare of shoppers, employees and residents

PART TWO: RECOMMENDED REVITALIZATION SCENARIO AND IMPLEMENTATION/MARKETING PLAN

IV. PREFERRED LONG-TERM VISION

Much of the effort of this study has been devoted to understanding current market opportunities and devising a clear plan for furthering the goals of revitalization, particularly over the next few years. It is clear that revitalization of Richmond Highway, as of most areas, must be an incremental process that will not occur magically overnight. However, it is much easier to sustain the energy and discipline required for such a long-term effort if there is a consensus regarding the preferred long-term vision. The Commercial Revitalization Advisory Group was very successful in arriving at such a vision, which is described in this section. It must be remembered, however, that this vision will never be achieved unless many smaller steps that are much less dramatic are taken in the meantime. Furthermore, the long-term vision must not be used to prevent positive actions from being accepted and welcomed, even if they are much less visionary.

In the long term, "Woodlawn Boulevard," as Richmond Highway is proposed to be renamed (see Section VI), is seen as a landscaped avenue which, while capable of meeting the carrying capacity of a major arterial road, is also perceived as an object of civic pride, the County's "Main Street," where nearby residents as well as visitors to the region, might come to spend time, to be public, to work, and shop and even stroll, and where additional citizens may come to live.

The recommended development along Richmond Highway in the long term envisions a series of nodes or neighborhood centers that combine office space, retail opportunities and housing in a pattern of traditional streets, reminiscent of development before World War II, that encourages walkability and 24-hour activity. (See EXHIBIT IV-1, Community Vision Summary, at the end of this report.) Furthermore, the pattern is one that is intended, wherever feasible, to tie in to existing development, paying particular attention to the residential development to the east and west of Richmond Highway. Between each of these nodes, it is envisioned that medium to high density residential or commercial (office) space can be developed along the northern half of the boulevard, while medium density residential development is envisioned filling out the boulevard in the southern half. EXHIBIT IV-2 shows the conceptual cross section of Richmond Highway in the two distinct areas. In the nodal areas, development is moved up to the property line while wide sidewalks allow the pedestrian a comfortable experience. The example here shows a "frontage," or service road, within the property itself, and not as part of the right-of-way or any proposed improvement to Route 1 overall. This would be an option on the developer's part allowing a small amount of parking in the front while maintaining a street friendly facade. In the areas between the nodes, apartment buildings would be set behind large front yards devoid of parking lots to create a proper residential feel.

The near-term market conditions do not seem to indicate opportunities for such higher densities within the next five years particularly in the office segment. However, while one of the chief goals of this revitalization effort is to leverage existing assets in order to achieve near-term improvement in the market performance of the area, another one of the goals of this effort is to alter these market conditions through a comprehensive strategy aimed at changing the public's perceptions of Richmond Highway. As an aging arterial that appears more or less abandoned by a greater part of the development and consuming community, a vicious cycle of decline has set in. Its image prevents the development of the very projects necessary to substantially alter that image. Thus, it is unable to share in the relatively healthy housing and office market that exists overall throughout Fairfax County. The proximity of Richmond Highway to significant assets and powerful economic centers suggests that the disparity of market opportunities between Richmond

Highway and other portions of the County is based largely on those perceptions. Providing near-term incentives to succeed in completing at least one significant project, coupled with aggressive marketing and an enhanced infrastructure, will ultimately provide the fuel to change the status quo. In particular, if the recommendations for one of these neighborhood centers, "Kings Crossing," described below -- for which current market forces suggest some support -- can be implemented relatively soon, the development inertia which now plagues the corridor will be broken, and new market opportunities will take hold.

There are eight neighborhood centers in all, each having particular characteristics. From the north, they are:

1) **Kings Crossing** (See EXHIBIT IV-3 at the end of this report): Relatively close proximity to the Huntington Metro Station and the Beltway makes this site the likely first candidate for redevelopment. Depressing the through lanes of Richmond Highway while constructing atop them a landscaped traffic circle at the original grade would resolve the awkward intersection of Richmond Highway and Kings Highway (both South and North). On the east side of the circle (the "Kmart" or "Michael's" site), consistent with the market study, a retail development with some housing or office above is envisioned combining 90,000 to 100,000 square feet of retail in a "Main Street" format including a new supermarket, while providing a venue for restaurants and outdoor cafes. Such a center will provide a place for people to come to see and be seen as much as to shop. The opportunity to spend time in an appealing community setting such as this is one that is sorely lacking along Richmond Highway at present. Shirlington in Arlington County is an example of an existing center with this kind of character.

While the market study suggests that this program is achievable in the short term, additional development with a mix of uses is proposed over the longer term. Assuming the success of this undertaking, higher density office and apartment development is imagined above and adjacent to this development. Structured parking will be necessary at this density, as illustrated here imbedded within the center of blocks. The following densities are recommended (See EXHIBIT IV-4):

- Area 1: F.A.R. = 0.8, with the a density bonus of 0.3 F.A.R. for housing "above the shops." The structured parking is not included in the area calculation.
- Area 2: F.A.R. = 0.4
- Area 3: 60-dwelling units (d.u.)/acre, gross density
- Area 4: 10.5-d.u./acre, gross
- Area 5: 5.0-d.u./acre, gross, in the single-family areas
- Area 6: same as Area 1

Critical in this development is the interconnectedness of this housing with the mixed-use development in the center through a grid-like structure of streets. Residents in this area will be able to walk or drive directly from their home to the town center. An undevelopable site east of this could be acquired for use as a public park, where terrain and other natural features permit, while additional sites surrounding the circle may provide a setting for a cultural center. The aerial view of this site after final build-out assumes an overall density of 1.0 F.A.R. (and includes the use of part of the housing density bonus). One example of just such a higher density mixed-use development built from scratch is Mizner Park, in Boca Raton, Florida, (approximate F.A.R. is 1.0), built to replace an aging shopping mall along a highway (coincidentally Route 1) much like the one encountered here.

2) **Beacon Hill**: The site of Beacon Mall sits atop the highest elevation in the region and affords spectacular vistas into Alexandria, and on clear days into Washington, D.C. On the long-term agenda, the site is envisioned with high-rise office and hotel development

to take advantage of the views. Mid-rise apartment development at the edges of this node provides the transition to residential development to the west. A convention center and hotel has been identified by the CRAG as representing one possibility for the site; however, WMATA's nearby Huntington Metro Station is a more appropriate site for a Convention Center program as acknowledged in the Comprehensive Plan. The following steps are critical to ultimately making this area into a vital 24-hour community:

- Eventually demolishing the existing mall and replacing it with a traditional street grid made of blocks. This will create parcels of land that can be developed in response to market demand while encouraging a mix of office, retail and residential uses;

- Increasing pedestrian traffic and circulation by creating a human-scale environment of inviting open spaces that match the traditional street grid;

- Designing the new buildings to create a distinctive skyline and a focal point for the community while simultaneously scaling and setting back the buildings to complement the residential neighborhoods behind; and

- The creation of a civic space, a park, possibly accommodating an outdoor ice skating rink. This space will serve a focal point for business in this part of Richmond Highway as well as for residents of nearby neighborhoods.

The overall density contemplated for this area is quite high, an F.A.R. of 1.5 terraced over the site with 2.0 in the center (to allow for a high rise structure) stepping down to 1.0 along Richmond Highway to 0.5 at the edges of the site..

3) **North Hill**: There is strong citizen interest in keeping this 42-acre site a park, and the presence of problematic soils reinforces this inclination. However, the lack of any

"public face" to the park, and its position in between the nodes, cast doubt as to the degree to which the park would be used and would feel safe. Furthermore, the County's rather sizable financial obligation resulting from the redevelopment of this site may preclude public investment in other areas. Thus, the possibility for condensing the allowable density in development along the edge of the site in the following manner should be considered:

- The creation of a 14-acre park centered within the site, ringed on three sides by housing, but bordering directly on Richmond Highway;
- On two, two-acre parcels flanking the proposed park, adjacent to Richmond Highway, commercial/mixed-use development or an extended stay hotel at a density of 0.8 F.A.R.; and
- Upon the remaining 24 acres of land ringing the central park, retirement housing, possibly in a patio style format at a density of four units to the acre allowing a total of 96 homes, or possibly in an apartment format. Additional considerations include assembling adjacent parcels and combining densities on them, allowing an even larger park, while still achieving revenues to repay its debt.

4) **Hybla Valley Village**: The assemblage of three parcels: two adjacent shopping centers and a vacant 60-acre parcel to the west, adjacent to Huntley Meadows Park, would allow the development of a new town center, centered along this 7.5 mile length of Richmond Highway. Sitting in a valley, and capable of being seen from approaching traffic to the north, this is the site of the "Woodlawn Boulevard" Town Green, and a possible site for a new 100,000+ square foot County Services Building. Current market conditions suggest that the development of a restaurant village along a main street may be possible now, provided some flexibility on shared parking provided. Additionally, the

60-acre parcel to the west may provide a good site for retirement housing in small lot single-family format. Possible future redevelopment includes additional office and residential development above retail, within a pattern of traditional streets and squares as described above in the Kings Crossing section of these recommendations, but not to exceed an F.A.R. of 0.6.

Given the likelihood of the vacant 60-acre parcel being developed in the near term, it is essential that the layout of this neighborhood not prevent its interconnection to future development within the heart of this proposed town center. Provision should be made to allow its connection via a street in a location roughly between the two existing centers (following the diagram in the Vision Summary Plan). An actual connection does not necessarily have to be made immediately (though it could) so long as a right-of-way sufficient to accommodate a neighborhood street is provided. Furthermore, it is imperative that the design of this neighborhood follow the guidelines for livable streets described later in this report.

5) **Mt. Vernon Forks:** Leveraging its position at the intersection of Mt. Vernon Highway, and the presence of an existing antiques center, this proposed node or neighborhood center is seen growing from an expansion of the antiques market concept. In what would be a unique asset within Fairfax County, and complementary to the historical motif of the area, the neighborhood is imagined as a center for arts and an antiques market. Promoting economic development along this portion of Richmond Highway by jump starting cottage industries, a technique that is known in some circles as "micro-enterprise development," the proposal is to utilize property tax abatement of limited duration (described in the recommendations section later in this report) to attract antiques dealers and artisans engaged in supporting the arts and antiques markets, e.g., furniture repair and upholsterers, stained glass fabricators, and other artisans, as well as those engaged in the fine arts. When ultimately built-out, the neighborhood will combine

housing at a medium density possibly in townhouse forms and loft-like live/work units (described below) at 12-16 d.u./acre with additional housing above the antiques center. Small amounts of neighborhood commercial would complete the neighborhood, but retail stores (not including antiques markets and art galleries) over 4,000 square feet would not be eligible for the tax abatement. This neighborhood is seen as one that may develop in the nearer term, if tax abatement tactics are adopted. Densities within the mixed-use areas should be 0.4 F.A.R. with a bonus of 0.2 F.A.R. for housing "above the shop."

The live/work units are an unusual aspect of this area necessary to promote its unique character, and may require zoning allowance. These units are, as the name implies, those residences from which one can also operate a business. In this neighborhood, both the sale of art and antiques and crafts associated with their production and repair are permitted from any property regardless of its zoning designation. For the independent craftsperson, it allows the purchase of a workshop and residence utilizing one mortgage and allows considerable savings in rent. Tax abatement would be an additional incentive and owners would be subject to a yearly property inspection to assure compliance with the terms under which preferential treatment was granted. In the near term, this may facilitate the use of several of the abandoned structures on this property as workshops within which one may also live. Later, as the area begins to redevelop (and the tax abatement is no longer necessary), the live/work classification will allow someone to turn part or all of a home into an art gallery or to build an antiques store to suit. In new townhouse type construction home workshops will be permitted to operate out of accessory units on alleys, allowing such activities complementary to the antiques market such as furniture repair and upholstery, art restoration, etc. to take place. Ultimately, it is imagined, there will be a mixing of residences and small locally owned shops within this area.

6) **Smitty's Center**: As the market develops in the long term, this will be another node for developing a mixed-use neighborhood center. The lack of any immediate market for the site may be a positive as there exists community support to find a single large employer who would take a portion of the site while developing the remainder for medium density residential (12 to 18 units per acre) and neighborhood serving retail to transition to existing residential development.

7) **Engleside:** Interparcel access would allow adjacent shopping centers to link and, ultimately, redevelop into a neighborhood center serving the lower portion of Richmond Highway. Additional residential development should follow the pattern established along the boulevard and transition to existing residential neighborhoods, with a density of roughly 16-20 dwelling units per acre.

8) **Grist Mill Inn**: Located on the Future Farmers of America parcel, adjacent to the actual Grist Mill, the site is seen as serving a single use or at least related set of uses: as an inn and historically themed recreation and entertainment center. While over half sits within a flood plain, and is therefore unavailable for buildings, the site has tremendous potential to be used for recreational purposes serving the tourist and vacation market, i.e., either guests at the inn or day visitors, while hotel related facilities can be easily accommodated in the remaining portion of the site.

V. ORGANIZATIONAL RECOMMENDATIONS

Successful revitalization will require a combination of County and private commitment and investment, supplemented by Federal and state resources as available.

Successful revitalization also requires an entity with a full-time paid staff, including potentially taking an active role in a public/private partnership to develop particular sites. Such an entity, which should predominantly represent the local business and property owner community, has been proven in hundreds of commercial areas throughout the country to be vital for revitalization.

Richmond Highway has the great advantage over other revitalization areas in the county of already having an established entity, Southeast Fairfax Development Corporation (SFDC), with a mission of furthering revitalization of the area. The consulting team is recommending an ambitious but achievable agenda of programs and actions for the study area. The consulting team has concluded that SFDC is the logical organization to implement the revitalization strategy, if it is willing to take on this responsibility. However, this will require changes that ensure that SFDC is fully representative of local business and property owners, and, in all likelihood, the addition of staff with experience in public/private partnership development projects. Additional powers, such as the ability to acquire sites, will also need to be added. If SFDC is not willing or able to make such changes, it might be necessary to create a new organization to play these roles.

To date, SFDC has been dependent upon County funding as well as various other relatively unpredictable revenue sources. Over time, the local business community in situations such as this sometimes comes to the conclusion that more resources are needed for specific services and/or capital improvements that will be a valuable investment for their businesses. This can result in their searching for a mechanism to add a small amount of annual tax for all property owners in the area or a portion of the area, with all of the revenues under control of the entity and dedicated to the desired revitalization activities. This has been accomplished in many areas throughout the country using a "business improvement district" or "BID". We recommend that SFDC begin to explore changes that would be necessary to allow it to expand into a BID if requested by the local property owners and business community at a future time. Currently, Virginia law provides three possible mechanisms:

--Sanitary District, which has been used many times in Fairfax County for infrastructure, parks, services, etc. This would be set up by the Board of Supervisors, but typically with an advisory board representing the interests of the area served. Any bonds issued by a sanitary district would have to be approved by the voters in the area affected.

--Service District, the most commonly used mechanism to date in Virginia for business improvement districts. Such a district would also be set up by the Board of Supervisors and could be funded with an annual property tax paid by those in the designated area. It would be unheard of for the Board to approve such a district without strong support from the affected property owners. The district can provide a whole range of services beyond those normally paid for by the County, such as promotion, economic development, special events, parking, additional garbage removal, etc. Service districts cannot, however, issue bonds. (This is currently being considered by the Ballston Partnership and Rosslyn Renaissance.)

-- Community Development Authority, a relatively new mechanism that has not yet been used in Virginia. Property owners representing either 51% of the land

area or 51% of the assessed value in a particular area must petition the Board of Supervisors to establish such an authority, which would be funded through an additional tax on property owners in the area. A majority of the members of the CDA must be the petitioning landowners or their designees or nominees. A CDA can issue tax exempt bonds for a wide range of purposes.

VI. RECOMMENDED PROGRAMS AND ACTIONS

Successful revitalization requires a comprehensive approach with multiple programs and actions undertaken simultaneously in a coordinated fashion. This can be a daunting prospect, particularly when financial resources of both paid staff and volunteers are limited. However, if success is to be achieved, there is no alternative to a commitment to achieve a number of actions within a short time period.

The consulting team, working closely with County staff and the Commercial Revitalization Advisory Group, used an organized process to develop a comprehensive set of recommended programs and actions that will work to achieve the goals set forth in the previous section. This process began with the consulting team developing a list of possible programs and actions that would potentially help to achieve the goals. These were presented to the Commercial Revitalization Advisory Group for reaction, including suggestions for additional items that were not on the list. The Commercial Revitalization Advisory Group discussed the pros and cons of the items on the consulting team list and nominated and discussed several additional items. The Commercial Revitalization Advisory Group members then participated in a "dot voting" exercise whereby they had four high priority dots to place on one or more items that they considered to be most important, and 12 priority dots to place on one or more items that they also considered to be important. Finally, they had four dots that they could put on one or more items that they believed would be undesirable for the study area.

The results of this "voting" are shown on EXHIBIT VI-1, with three points assigned for every high priority vote, one point assigned for every priority vote and one negative point assigned for every negative vote. The number of Commercial Revitalization Advisory Group votes, counted in this fashion, is also shown in parentheses in the discussion that follows. The consulting team did not believe that any of the possible

EXHIBIT VI-1

RECOMMENDED PROGRAMS AND ACTIONS

PROMOTION/ECONOMIC RESTRUCTURING			
A Promotional calendar w/ coordinated marketing efforts	3	$	★★
B Rename Richmond Highway (probably Woodlawn Blvd.)	12	$	★★★
C Historic Theme--south of Hybla Valley	13	$-$$	★★★
D Marketing northern part to employment-generating uses	12	$	★★★★
E Publicize/expand small business assistance programs	29	$-$$	★★
TRANSPORTATION			
F Improve pedestrian accessibility	16	$$	★★★
G Bus stops w/in shopping centers	18	$	★★★
H Ensure adequate vehicular access to all parcels	15	$$$	★★★★★
I Adequate parking as road modifications occur	2	$$	★★★
J Shared parking in future mixed-use developments	--	$	★
K VDOT consideration of light rail	--	$$$	★★★
DESIGN/APPEARANCE IMPROVEMENTS			
Comprehensive program to improve/remove undesirable structures:			
L -- Expand spot blight abatement/legal action	25	$-$$	★★★★★
M -- Tax abatement and investment incentives	--	$-$$	★★★★★
N -- Increase staff for zoning and building code enforcement	9	$$	★★★★★
O -- Acquisition and demolition	6	$$-$$$	★★★★★
P Street furniture and landscaping	3	$$-$$$	★★★★
Q Provide loans and design assistance for improvements	13	$$	★★★★★
R Design guidelines for projects receiving incentives	5	$	★★★★
S Place utilities underground	11	$$$	★★
T Use publicly funded improvements to leverage private investment	--	$	★★★★★
SECURITY			
U Enhance/publicize police efforts	4	$-$$	★★★★
V Business watch program	7	$	★★★★
ZONING/APPROVAL PROCESS			
W "Green Tape Zone" with expedited approval process	19	$	★★★★★
X Incentive zoning perks for projects meeting specified standards	13	$	★★★★★
Y Create mixed-use zone	5	$	★★★★★
Z Amend Comprehensive Plan to be consistent with revitalization	--	$	★★★★★
FACILITATION OF SPECIFIC DEVELOPMENT/REDEVELOPMENT PROJECTS			
a Active County/SFDC involvement in development	--	$$$	★★1/2

SOURCE: Robert Charles Lesser & Co.

programmatic initiatives that received negative votes were important for revitalization, and none of these have been included in the recommendations that follow. Items not voted upon by the Commercial Revitalization Advisory Group are indicated with a (--).

The consulting team then proceeded to analyze, based on their professional judgment and experience, which of the possible programs and actions would be most critical components of a comprehensive approach to achieving the revitalization goals, taking account of the feedback from the Commercial Revitalization Advisory Group. The team also estimated the relative cost of implementing each of the recommended programs and actions; the following key is used in the discussion in this section:

Consulting Team Estimate of Relative Cost

$=Low cost

$-$$=Low to Medium Cost

$$=Medium cost

$$-$$$=Medium to High Cost

$$$=High cost

Furthermore, the consulting team assessed the relative impact of each recommended program and action on achieving the revitalization goals; the following key is used in the discussion:

Consulting Team Assessment of the Impact of the Action on Meeting Revitalization Goals

★★★★★=Very high impact

★★★★=High impact

★★★=Moderately high impact

★★=Moderate impact

★=Relatively low impact

The consulting team recommends that SFDC (or, if necessary, a new organization created to take responsibility for revitalization) work closely with the Fairfax County Revitalization Division to implement the following programs and actions. A graph showing the programs and actions by estimated cost and impact in on EXHIBIT VI-2.

PROMOTION/ECONOMIC RESTRUCTURING

A. Develop coordinated marketing of Richmond Highway as a unified retail district, with joint advertising; festivals and other special events, parades, contests and leaflets; promotional calendar with simultaneous sales; and consistent hours, all compatible with any theme(s) that have been adopted. (3) ($) (★★)

Discussion: Richmond Highway shopping centers and specific retailers are competing with an increasing number of other retail areas, in many cases planned shopping centers and major retailers with positive images and large advertising budgets. Although this item did not receive a large amount of support from Commercial Revitalization Advisory Group members, the consulting team believes it will be important for the shopping centers and retailers in the area to cooperate as much as possible to achieve the same benefits that are more easily realized in a single planned shopping center. This does not have to be an expensive program, although clearly the effectiveness tends to be correlated in part with the resources committed to it. At a minimum, all significant shopping center owners and retailers should be expected to dedicate some of their marketing budget to such a joint effort. SFDC in an expanded form could be an effective entity to organize this effort.

EXHIBIT VI-2

COST-BENEFIT MATRIX

	★	★★	★★★	★★★★	★★★★★
$		A	BGJ	DRV	TWX YZ
$$		E	C FI	U	LM NQ
$$$		S a	K	P	O H

IMPACT

SOURCE: Robert Charles Lesser & Co.

Festivals, parades and other special events would also be valuable ways to promote the revitalization area to potential customers and businesses.

B. Rename Richmond Highway (probably Woodlawn Boulevard.) in conjunction with publicity about other revitalization actions being taken (12) ($) (★★★)

Discussion: As discussed above, Richmond Highway is suffering from image problems that are adversely affecting the ability to attract quality retailers, shoppers, office developers and tenants, and others to the area. Neither "Richmond Highway" nor "Route One" has particularly positive connotations. Changing the name, particularly to one that takes advantage of the historic attractions in the area, will be helpful in its own right. Perhaps even more important, a name change in conjunction with a coordinated package of other significant actions and changes will help to dramatize that a truly new era is beginning for the revitalization area. The name change itself will have a relatively low cost. There may be some resistance on the part of business owners to changing the street name on their stationery, but this should not be very onerous as long as the Post Office is willing to deliver to either address for a long enough period of time to allow stationery supplies to run out.

C. Designate historic theme for area south of Hybla Valley, with supporting signs and landscaping, Inn, expanded Thieves' Market, etc. (13) ($-$$) (★★★)

Discussion: A strong, positive theme can be an important element in attracting shoppers, office users and residents to an area. The portion of the revitalization area between Hybla Valley and Ft. Belvoir has a number of assets that could potentially be the foundation of an historic theme for that portion of the revitalization area. These assets include proximity to Mt. Vernon, the most-visited Washington-area tourist attraction outside of the core of Washington and Arlington; Woodlawn Plantation and Pope-Leighy

House; and the Grist Mill. The antique establishments at Thieves' Market are also quite complementary to these historic attractions. Efforts should be made to implement the vision for this "Mt. Vernon Forks" area described in Section IV. Furthermore, the potential inn discussed in the market analysis portion of this report would benefit from and help to bolster the existing historic elements in this area. This theme can be implemented with relatively low cost, but it will become more expensive if extensive signage and landscaping investments are made, and/or incentives are required to facilitate development of the inn and expanded Thieves' Market.

D. Market northern part of boulevard to employment-generating uses (12) ($) (★★★★)

--Work closely with brokerage community and local property owners to recruit office-based businesses and developers

--Work closely with brokerage community and local shopping center and other property owners to recruit retail and service businesses and developers, focusing on recruiting retailers and development projects that will recapture lost expenditures from eastern portion of the Mt. Vernon area

--Work with EDA to more fully incorporate the boulevard in their marketing efforts

Discussion: There is a strong desire on the part of the Commercial Revitalization Advisory Group to encourage development that will create relatively high-paying jobs along Richmond Highway. In particular, on the northern part of the boulevard (from the Beacon Mall area north), it would be highly desirable to attract more office development. As discussed in the market analysis section, the current likely market for at least the next few years is not particularly favorable for this type of development, certainly unless powerful incentives are made available (see the discussion in Section VII regarding incentives for development and redevelopment). However, to the extent that incentives are made available, an outreach effort will be critical to attract the best possible developers and to help them fill their buildings.

Furthermore, it is possible that a particular office user will be identified, particularly by the County Economic Development Authority, that could be interested in a Richmond Highway location, especially as the revitalization effort proceeds and the image of the area begins to improve. Particular strengths that EDA should be promoting and keeping in mind as they work with businesses are: proximity to National Airport; proximity to the Beltway, with easy access to both Virginia and Maryland; proximity to executive housing locations to the east and in parts of Alexandria; proximity to Ft. Belvoir and to various key government agencies, particularly if the Patent and Trademark Office chooses to move to Eisenhower Valley; proximity to the Huntington Metro station; labor force availability, including job training that can be catered to particular job openings; and the availability of incentives, if any. Based upon discussions with EDA staff, it is clear that locations in other parts of the county, such as Tysons Corner, Reston, Fair Lakes, etc., tend to better meet the criteria of, and to be selected by, companies with which they are working. However, it will be important for the Revitalization Division to work closely with EDA to actively present possible Richmond Highway locations to prospects. The Revitalization Division and SFDC must strive to make more locations suitable for consideration by prospects (e.g., by ensuring that appropriate zoning is in place, that speculative buildings are developed if possible, etc.). Some potential prospects will be in the county for the upcoming World Congress on Information Technology, and if possible potential locations should be identified in time to be presented to these prospects.

With respect to retailers, the greatest need (as discussed in the market research section) is to attract retailers and new retail projects (or mixed-use projects that include retail) that will appeal to residents of the eastern portion of the Primary Market Area, who are shopping less on Richmond Highway than would normally be expected given their geographical proximity. Given the large number of property owners along Richmond Highway, fully centralizing retail management in the revitalization area would be very challenging. However, SFDC should be playing a key role in working with shopping centers and brokers to attract the most desirable possible stores when locations become available. For example, there are several locations for major retailers in Beacon Mall. SFDC should be engaged in outreach so that it is aware of retailers looking for locations in the area, and the desirable ones should be put in contact with the appropriate broker when space becomes available. Furthermore, SFDC should intensify its effort to publicize the potential availability of new development and redevelopment sites suitable for retail development, as well as any available incentives, and to keep track of quality retail developers who it might be possible to attract to the area.

It is also critical that the Revitalization Division be empowered and funded to participate actively in organizations (e.g., brokers breakfasts, National Association of Industrial and Office Parks, Urban Land Institute, etc.) that are key to attracting these potential types of development.

E. Publicize and expand small business assistance programs (e.g., provided by South Fairfax Business Resource Center) and job training/work skills training for area residents (29) ($-$$) (★★)

Discussion: The study area benefits from already having small business assistance and job training/work skills programs in place. Despite this, publicizing and expanding these programs received a great deal of support from CRAG members. Furthermore, interviews with retailers along Richmond Highway indicated that availability of workers with good work skills and attitudes is a major concern that affects the viability of certain businesses, the extent to which they can provide quality service, and therefore the competitiveness of Richmond Highway with other retail areas. It will also be very beneficial for retailers to receive training in reorienting their operations, merchandising and promotion in order to increase the desirability of the stores to potential customers throughout the entire Primary Market Area. Coordinated marketing of the area, as recommended above, will be much more successful if every effort is made to improve the quality of existing and future stores and service providers. This will include appearance issues discussed below, but it must also include improvements in service and quality and depth of merchandise, which can be facilitated by these business assistance programs.

It appears that the programs that are available are not sufficiently well known to all those that could take advantage of them, and expansion of these programs may well be necessary, particularly as more people learn about them. On action that could be very helpful would be to move SFDC, the South Fairfax Business Resource Center, and the job training center into one complex or building, so that people using one organization will be more likely to realize the other services that area available.

TRANSPORTATION

F. Improve pedestrian accessibility throughout area (16) ($$) (★★★)

Discussion: Improving pedestrian accessibility was a high priority for CRAG members. Some parts of Richmond Highway already have a fair amount of pedestrian activity, with people walking from homes to stores in order to shop, work, etc. However, walking is not a particularly pleasant experience. Most people who have access to cars use them even for short trips. This results in increased traffic congestion and makes it more difficult for those who need to drive to access the commercial establishments in the area. Improving pedestrian accessibility between residential areas and commercial areas and between commercial establishments will reduce the dependence on the automobile.

Improving pedestrian accessibility will involve actions of both the public and private sectors. It is recommended, for example, that Richmond Highway have wide sidewalks on both sides. In the nodes, or CBCs as they are called in the Comprehensive Plan, sidewalks should be fifteen feet wide including space for trees in wells. In the areas between the nodes, in what are termed "Suburban Residential Areas" in the Comprehensive Plan, an eight-foot tree planting strip should adjoin Richmond Highway with an adjacent seven-foot sidewalk). It is also recommended that pedestrian connections be made from the Richmond Highway sidewalks to each of the land uses along the roadway. Of equal concern is pedestrian accessibility within and *between* parcels. Many of the consultant team's recommendations regarding zoning and design guidelines directly address this matter, but it bears repeating that projects or neighborhoods where vital activities are within a five minute walk, and where sidewalks and street crossings are designed with the experience of the pedestrian in mind, are likely to be used more often. Therefore, revitalization and redevelopment activities that allow a range of errands or activities to be accomplished from one parking space ought to receive preference for the County's scarce incentives.

G. Place bus stops within major shopping centers (18) ($) (★★★)

Discussion: Buses are a very important form of transportation for both employees and patrons of the retail establishments along Richmond Highway, and buses have the potential to become even more important. The bus routes in the area provide access to the Metrorail system. Several merchants indicated in interviews that it would help them to attract and retain qualified employees and increase their retail sales if bus stops were placed in their shopping centers. This item was also a high priority for CRAG members and would not be very costly. Although it might slow bus service along the highway slightly, on balance it would be helpful to strengthen retailing along Richmond Highway. It would also encourage greater bus patronage.

H. **As a key part of the VDOT study, ensure adequate vehicular access to each parcel (e.g., signalized intersections, turn lanes, signal timing, address frontage road issues on a subarea by subarea basis) (15) ($$$) (★★★★★)**

Discussion: Despite the desirability of facilitating access to businesses along Richmond Highway by pedestrians and those using public transportation, the majority of workers and shoppers will undoubtedly continue to come by car. No suburban commercial area can thrive unless automobile access is adequate. This is even more true for areas such as Richmond Highway that are competing with other commercial areas, especially newer ones, that have been designed to provide easy vehicular access. As discussed in the Transportation and Planning section above, there are sections along Richmond Highway where vehicular access is confusing and dangerous, and there are indications that adequate signal timing may not be available to permit sufficient left turns to be made into certain commercial properties, etc. The northern portion of the road has a median and signals at key intersections. There are scattered locations that have frontage roads. In addition, the frontage road configurations vary from one section to another. The southern portion of Richmond Highway is undivided with a mixture of five-lane cross-section with the center lane used for two-way left turns and four-lane cross-section with no left turn lanes.

Improvements along Richmond Highway arising out of the VDOT study provide the opportunity to improve the accessibility and safety of traffic movements into and out of the parcels. However, to some extent there is a conflict between facilitating higher speeds and traffic volumes, on the one hand, and facilitating access to businesses along the road. Accessibility to parcels must be a very high priority if the revitalization effort is to succeed. It would be ironic and unfortunate if highway improvements intended to serve projected future household and employment growth ended up stifling revitalization and limiting the growth that was supposed to be served.

Turning lanes will be provided at intersections. Traffic signals will be installed at intersections where traffic volumes warrant their placement. While there may be a perception of conflicts between facilitating higher speeds and traffic volumes on the one hand, and facilitating access into the properties on the other hand, this perception can be overcome. Accessibility to the parcels must be a very high priority if the revitalization effort is to succeed. This can be accomplished through the provision of adequate turning lanes to accommodate traffic demand. Adequate curb cuts must be maintained, although from urban design and traffic flow standpoints interparcel connections with fewer curb cuts can be an advantage. In addition, traffic signal progressions can be maintained along Richmond Highway to provide smooth flow of through traffic while appropriate traffic signal phasing and timing is provided for turning movements to and from the development parcels.

It is recommended that frontage roads (or service drives) be only selectively placed along Richmond Highway. A major problem with frontage roads is the confusion created at intersections resulting from the vehicular conflicts between the mainline traffic, frontage road traffic, and cross-street traffic. In addition, the frontage roads significantly increase the required right-of-way. The role of the frontage road in consolidating traffic from adjacent parcels can be provided by inter-parcel connections.

As the VDOT study recommendations are implemented, it will also be important to make it possible for businesses that are displaced due to right-of-way acquisition to move to centers and sites where business development is being encouraged.

I. **Ensure adequate parking as road modifications occur in the future (2) ($$) (★★★)**

Discussion: Providing adequate parking is as vital to the revitalization effort as providing adequate vehicular access. At the present time, parking along Richmond Highway is generally abundant, and in some cases excessive relative to current demand for spaces. However, future widening of Richmond Highway and the resulting required right-of-way could lead to the loss of parking for various parcels. Care must be taken to assure that the properties along Richmond Highway have sufficient parking to accommodate their planned development. This is an indication of the need for sensitivity to the health of businesses in the design and construction of highway widenings and other improvements.

J. **Allow shared parking in future mixed-use developments ($) (★★★)**

Discussion: As future development occurs along Richmond Highway, it will be desirable for much of it to be in the form of mixed-use developments. One advantage of such mixed-use developments is that some uses experience their maximum parking demand at certain times, while other uses experience their maximum parking demand at other times.

As development currently occurs along Richmond Highway, each conventional suburban shopping center or office building is separate, and each must satisfy its own parking requirement on its own property. A shopping center parking lot is filled on only a few peak days. A typical parking requirement for a shopping center is five cars for every 1,000 square feet of gross floor area (GFA). However, for shopping centers or mixed-use centers over 400,000 square feet of GFA, Fairfax County requires six cars for 1,000 square feet of net floor area of shopping area, which translates into roughly the equivalent of seven cars per square foot of GFA, in addition to the parking normally required by the other uses on the site. Most of the time, in shopping centers, much of this parking is not in use. Meanwhile, in the relatively little office space that exists along Richmond Highway, the parking lots are empty on evenings and weekends, when the parking lots at the shopping center are filling up (and the same is likely to be true in any new office space built in the future). During a typical weekday, the reverse pattern of parking lot use is apparent.

The total number of necessary spaces might be considerably less in an office and retail mixed-use development than in separate office and retail developments of the same size, resulting in considerable savings on land and infrastructure costs. However, as the Zoning Ordinance is currently written, no reduction in parking is permitted as a matter of right.

Rather, as has been mentioned above, the County currently permits reductions in parking for mixed-use developments on a case-by-case basis. A separate and costly study needs to be submitted for each proposed reduction, and as has been pointed out, compliance with the requirements for these reductions is difficult at best. Approval by the Board of Supervisors is needed for each proposal. In order to streamline the process, the County parking code should be modified to permit reduced parking in mixed-use developments that have uses that require peak parking at different times. The exact rate of reduction for shared parking will have to be determined. In general, however, the number of parking spaces required for a mixed-use center should be calculated by multiplying the minimum amount of parking normally required for each land use by a percentage established by the County and published in a parking credit schedule for a variety of time periods. Applying, for example, the parking credit schedule established by Montgomery County, Maryland, a mixed-use center of half office space and half retail would enjoy a 20% reduction in parking over what would be required by simply totalling the individual requirements. Mixing housing, retail and office space in equal increments would allow a 30% reduction over individually calculated requirements. As this schedule is generally derived from standards adopted by the Urban Land Institute (ULI), it is safe to assume that such a reduction in requirements of the Zoning Ordinance would find general acceptance within the development and financial community.

K. Encourage VDOT to include consideration of light rail or other improved transit on the boulevard (consideration: $; actual cost:$$$) (★★★)

Discussion: Light rail or some other dramatic improvement in public transit should be part of the planning for this corridor. The recommended alternative for the Richmond Highway improvement should include sufficient space for such a facility. There are ample examples in Northern Virginia of the significant effects that improved transit can have on surrounding areas. Clearly, much of the revitalization that has occurred near the Ballston, Courthouse, King Street and other Metro stations would not have occurred without these stations. Light rail is expensive and would probably not be justified by current densities along Richmond Highway. However, the long-term vision for high-density development along the corridor, somewhat akin to Wilson Boulevard in Arlington County or Connecticut Avenue in Northwest Washington (in terms of its mixed-use nodes separated by low-density street oriented retail or high density residential) would be much more likely to occur with improved transit in a form that is desirable to a broad range of residents, workers and shoppers.

DESIGN/APPEARANCE IMPROVEMENTS

Devise and implement comprehensive program to improve and, if necessary, remove undesirable structures:

L. Expand spot blight abatement program to more properties and otherwise pursue legal action against undesirable structures, perhaps by enacting and enforcing "care of premises" ordinances (25) ($-$$) (★★★★★)

Discussion: It is clear from our interviews and other research that the appearance of Richmond Highway--particularly the large number of substandard and otherwise unattractive and deteriorated buildings--is a massive barrier to revitalization. By and large, businesses do not like to locate their offices in areas with such uses, the more desirable retail chains do not choose to locate stores there, and people who have other choices do not choose to shop or live there. It is vital that the County and SFDC work closely together in a comprehensive fashion, with all possible resources, to improve and, if necessary, remove the undesirable structures.

Fairfax County has taken a very positive step forward with the spot blight abatement program. However, the program currently affects only a small number of properties. The County Attorney's office should be charged with investigating in a creative fashion whether it would be possible to expand the blight abatement program to more properties and to otherwise compel property owners to fix up their buildings. If it is determined that this would require state legislative changes, the County should strongly encourage that such changes be made. (This was one of the highest priority items for CRAG members.)

M. Encourage use of tax abatement program, and consider more generous rules for investment in properties that occurs in revitalization areas and is consistent with revitalization plan, design guidelines, etc. ($-$$) (★★★★★)

Discussion: Adoption of a tax abatement program for investment in existing properties is also a very positive step for Fairfax County. Although the program is available throughout the county, not just in revitalization areas, most of the commercial properties that can take advantage of it are probably in revitalization areas. However, the consulting team is concerned that applying the program county-wide may have set an undesirable precedent. Revitalization areas are inherently ones where private market investment is less likely to occur than in areas that do not have the same revitalization needs. Furthermore, much of the County's resources are dedicated to expanding infrastructure and services into more outlying areas that have been developed more recently. If the private and public investment that has been made over the years in revitalization areas is not to be jeopardized, it will be critical to give revitalization areas advantages over other parts of the county with respect to the applicability and rules for certain programs and the allocation of certain categories of funds and staff.

With respect to the tax abatement program, the County and SFDC should work together to actively promote the program and encourage use of it, including exploring making design assistance available for property owners that require it and are interested in making changes that are consistent with the revitalization plan and design guidelines. Once the program has been used for a while, consideration should be given to making the provisions more generous in revitalization areas than elsewhere in the county, recognizing the competitive disadvantage for investment that revitalization areas otherwise have. State legislative changes should be pursued if necessary to make this possible.

N. Reassign or add staff to intensify zoning and building code enforcement (with loans/grants available for fix-up), including stricter enforcement of controls on illegal/temporary signs and activities (9) ($$) (★★★★★)

Discussion: As alluded to above, "fairness" does not necessarily mean equal allocation of resources or staff of every type to every part of the county. Some areas need more of some things and less of others than other parts of the county. The study area could benefit greatly from more concerted and organized zoning and building code enforcement, rather than waiting for complaints to be filed and basically ignoring violations that happen to be noticed while complaints are being responded to. Conversely, there is some evidence that enforcement staff are not nearly as busy in some other parts of the county. These staff should be reassigned, or if necessary additional staff should be added, so that zoning and building codes will be aggressively enforced in the revitalization area. This must include strict enforcement of controls on illegal and temporary signs and activities. (This should be combined with the carrot of a revolving loan program discussed below, with below-market interest rates for qualifying property owners and improvements.)

O. Initiate selected acquisition and demolition of undesirable structures, for desired redevelopment if possible, and holding if necessary as parkland awaiting future development opportunities (6) ($$-$$$) (★★★★★)

Discussion: If other measures fail to improve a particular property, it may be necessary for SFDC or the Redevelopment and Housing Authority to acquire selected properties and demolish or fix up the buildings. Whenever this is done, priority should be given to making the property available for desired types of development, or actually initiating public/private development. If no desirable use is possible when the property is acquired, the structures should be demolished and the property held temporarily as parkland until development is possible. If enough dramatic changes are made in the appearance of undesirable properties along Richmond Highway, private investment consistent with revitalization goals is much more likely to occur in the near future.

P. **Improve/add street furniture and landscaping when improvements occur on Richmond Highway and at strategically located development nodes (3) ($$-$$$) (★★★★)**

Discussion: In addition to measures to improve the appearance and condition of private property along Richmond Highway, it will also be necessary to further improve the appearance of public property, including medians between frontage roads and the main road. The consulting team recommends that the County and local businesses and residents "lobby" hard with VDOT to seek the highest possible level of street furniture and landscaping when Richmond Highway is improved. Another priority should be improving landscaping and street furniture at the nodes identified in the long-range vision for the revitalization area.

Q. Provide loans from revolving loan fund (or grants), and design assistance, to small businesses for facade improvements, shopping center owners for parking lot landscaping and improved signage and facades, etc. (13) ($$) (★★★★★)

Discussion: It is typical in revitalization areas to find that some property owners would be willing to improve the appearance and condition of their properties, but they do not have easy access to funds to pay for it, or they need a financial incentive to make the investment. It will be very helpful to establish a revolving loan pool that can be used to provide below-market interest rate loans, in conjunction with design assistance if needed, to property owners willing to make improvements that are consistent with the revitalization plan and goals.

R. Develop and/or revise design guidelines for new construction and other projects receiving incentives such as expedited processing (5) ($) (★★★★); for example:

--Consistency of signage with theme

--Placement of new buildings to encourage pedestrian orientation (e.g., parking at side or rear)

--Encouraging new buildings to be at least two stories

--Landscaping standards

Discussion: One theme of the revitalization effort should be "*quid pro quo*": incentives should be offered to encourage property improvement and redevelopment, but only in exchange for doing things that further the goals of revitalization. Given the role that the appearance and pedestrian accessibility of Richmond Highway play in furthering revitalization, it would be foolish to incentivize investment that does not improve the boulevard on these ends. Therefore, the consulting team recommends that design guidelines be devised and/or revised that can be used as standards when property owners are requesting incentives (e.g., expedited processing, discussed above; loans from the revolving loan pool; density and other zoning enhancements; etc.). It is important, however, that design guidelines not become standards that are imposed regardless of whether or not incentives are provided. This could discourage more modest improvements that would nevertheless be very positive for the area.

Coupled with revitalization incentives, the urban design guidelines will help assure redevelopment that supports greater vitality along Richmond Highway. The guidelines should provide, at least in part, the criteria that proposed development needs to meet in order to be eligible for revitalization incentives.

The tendency of urban design guidelines to become prescriptive and highly detailed should be resisted. Rather, the guidelines ought to prescribe the basic relationships between buildings and streets. The primary areas of concern for these guidelines should be with building placement and relationship of building fronts to streets and sidewalks. Parking, another critical area of concern, should be placed to the sides and rears of buildings (or the center of blocks), and where possible, buildings should be multistory with shop windows along the sidewalk (when there is retail). Interparcel connections for pedestrians represent another topic that should be covered by design guidelines and should be addressed with prescriptions involving the edges of properties. Fencing and other barriers between properties which prevent such connections should be avoided, while streetscapes should extend to the sides of projects allowing disparate parcels to "front" one another. While a few other details are also appropriate for inclusion, questions regarding building style, color and detail are not appropriate concerns for such guidelines.

S. Encourage relocation or placement underground of utilities during reconstruction of Richmond Highway (11) ($$$) (★★)

Discussion: The existing utility lines along Richmond Highway are certainly not attractive, and it would be constructive to remove them or relocate them to the rear of the properties. In isolation, however, this would probably not be worth the cost. However, in the context of reconstruction of Richmond Highway, utility lines will probably have to be moved anyway, and the lines should certainly not be replaced in as visible a location

T. Use publicly funded improvements to leverage private investments in upgrading ($) (★★★★★)

Discussion: The *quid pro quo* theme should also be applied to public investment in improvements on public property. For example, when landscaping and street furniture investment is being considered, efforts should be made to mobilize private property owners and merchants to make improvements to their properties at the same time. To the extent that resources are limited, priority might be given to portions of Richmond Highway where private property owners are willing to invest also.

SECURITY

U. Enhance and publicize current police efforts in the area (4) ($-$$) (★★★★)

Discussion: There was considerable debate at CRAG meetings, and split opinions in our interviews, about the extent to which there are serious security problems in commercial areas along Richmond Highway. It is clear to us, however, that at least the perception of crime problems is deterring some shoppers from patronizing Richmond Highway stores and is one factor in discouraging desirable investment. At a minimum, the Police Department and SFDC should cooperate to publicize good news about the crime situation and efforts to improve security along Richmond Highway. Although this item did not receive many CRAG member priority votes, it is our strong suspicion that this is another situation where additional resources may need to be added (even if it means some reduction in resources elsewhere in the county) to further beef up the excellent efforts that the Police are currently making with available resources.

V. Implement business watch program, spearheaded by SFDC (7) ($) (★★★★)

Discussion: As a complement to the Police and publicity efforts in Recommendation U, we recommend that SFDC spearhead a business watch program, similar to the neighborhood watch programs that are common in residential areas, in areas where merchants believe that security continues to be a concern despite the best efforts of the police.

ZONING/APPROVAL PROCESS

W. **Make the boulevard a "green tape zone:" expedited approval process for desired projects consistent with the revitalization plan. (19) ($) (★★★★★)**

Discussion: One of the most common themes in the interviews we conducted, and one of the highest priorities of CRAG members, was that the required time and complexity of the development process along Richmond Highway is a major disincentive to investment. It will not be easy to attract desired investment to the revitalization area even if the process is made much quicker and easier, but there is no question that making the area a "green tape zone" rather than a "red tape zone" will make it much more likely that desirable development and redevelopment investment can be attracted to the area. If companies realize that the development approval process will be much smoother in the revitalization area than elsewhere in the county, it may encourage them to locate along Richmond Highway even though they might otherwise choose a different location.

One mechanism that has been very successful elsewhere is to create a team with all necessary staff from multiple agencies assigned to work together to get selected projects approved quickly. Projects that conform to the revitalization criteria articulated throughout this report with respect to their economic impacts, their mix of uses and their urban design would be eligible to receive such attention. Often referred to as a "SWAT Team," this team would have a leader to act as a facilitator. The leader would be charged with getting decision makers from every applicable County agency and department to move the particular project to the top of their agenda and to get each of these officials to offer opportunities to expedite the process, to "get it done." In the case of very large projects, this involvement would extend to the construction process itself, so that an interdisciplinary team of County officials would actually move their offices on site to allow for rapid response to problems or the need for inspections.

More generally, the County should recognize that the development review process is serving as a major disincentive to economic development. The County should organize an internal technical task force, modeled after the monopole task force, to quickly address these problems. The task force should include business and development representatives and should be led by the Economic Development Authority or the Revitalization Division.

X. Establish a revitalization incentive zoning district, enabling projects meeting specified programmatic and design standards to develop with increased FAR, some reduction in parking requirements, reductions in required setbacks and open space, etc. (13) ($) (★★★★★)

Discussion: It is also clear that other aspects of Richmond Highway, particularly the often shallow property depths backing up to residential areas, also make it difficult to develop and redevelop properties with the zoning requirements that were basically adopted with areas that have been developed more recently in mind. It will be very helpful to establish a revitalization incentive zoning district that provides for different requirements for projects meeting specified standards.

Essentially an overlay to existing or new zoning, the incentive zone could, among other things, reduce required setbacks to zero (after provision for required Richmond Highway right-of-way), reduce required parking ratios, provide for shared parking scenarios between contiguous lots and increase allowable densities (especially to accommodate a mix of uses) in return for development which is pedestrian friendly, and meets requirements of the proposed urban design guidelines. The reduced parking ratio, in the case of shopping or mixed-use centers over 400,000 square feet, would be reduced to 4.5-cars per 1,000 square feet of gross floor area. In the incentive zone described, these enhancements would be a matter of right, subject to their conformance with the guidelines, and not result from a waiver (under Sections 2-418; 6-207; 11-102 et al.) received as part of a cumbersome rezoning process. These guidelines would be applicable only to those projects receiving the incentives described. They would not apply to those projects being developed under the rules of existing zoning. As such, these guidelines would, in no way, create an obstacle to property improvement under the current rules.

Y. Create a mixed-use "MX" zone and use it to encourage mixed-use development/redevelopment and to address split-zoning issue. Alternatively, allow developers, as a matter of right, the ability to elect to use a PD zone as an alternative to existing zoning, provided the proposal is in conformance with the goals of the Comprehensive Plan. (5) ($) (★★★★★)

Discussion: The current lack of a mixed-use zoning category in Fairfax County makes the development of vital, mixed-use developments along Richmond Highway a cumbersome process, requiring a rezoning to PD status and then the submission of an application requiring a three-stage approval process as described earlier in this report. To reiterate: this process is both time consuming and costly in order to achieve an outcome that is expressly what is desired by the County as articulated in the Comprehensive Plan and would have been possible by right had an "MX" type zoning been in place. A mixed use-designation would allow development by-right in each of the proposed neighborhood centers or nodes, providing a significant savings of time and money for interested developers. Mixed-use zoning should also be considered for parcels that are currently suffering from split zoning (i.e., parcels zoned both residential and commercial that require rezoning for development).

One advantage of the MX zone is that it could be crafted to incorporate all of the "incentives" proposed in Section X, "Revitalization Incentive Zones," above, thus simplifying the regulations. The MX zone would have programmatic and urban design performance standards, as well as reduced parking ratios and reduced front yards, included, so that a separate set of guidelines would be unnecessary. Such a zone could be applied at selected locations throughout the county, and thus no one would be seen as receiving preferential treatment and the entire county would benefit from such regulatory improvement. While arguments have been made against using the Zoning Ordinance to enforce design standards, there are a number of counties around the country, most notably Sacramento County, California, and Dade County, Florida, that have adopted variations on this theme. Entitled the "Transit Oriented Development Ordinance" in California and the "Traditional Neighborhood Development Ordinance" in Florida, these optional zoning overlays specifically bring zoning and urban design together. As in these two examples, for the first ten years from its inception, the MX zone might be utilized as an optional zoning category by developers whose properties fall within designated areas. After that time, the County might consider the MX zone mandatory in certain locations, provided that as result of such a rezoning there was no net decrease in allowable development (as required by Virginia law).

In either scenario, rezoning to MX or the election of PD status as a matter of right, the approval process for projects that are consistent with the Comprehensive Plan should be no more burdensome or expensive than the process to approve a project conforming to existing C-8 zoning. Indeed, it should be easier.

Z. Amend Comprehensive Plan to be consistent with the revitalization effort (including the vision for the boulevard) ($) (★★★★★)

Discussion: The timing is opportune to ensure that the Comprehensive Plan is amended to reflect the recommendations of this study, including the long-term vision for Richmond Highway. However, it is also important that nothing in the comprehensive plan preclude positive shorter term investment, even if it is not consistent with the ultimate vision for a particular area.

Included in these amendments to the Comprehensive Plan should be the introduction of the concept of "Livable Streets," to govern development within the "Suburban Neighborhood Areas." This will assure greater pedestrian orientation both within individual development and across parcels, particularly those of differing uses. The following list may be considered a guide in defining the characteristics of livable streets; however, certain criteria may be more or less important in specific cases:

- Make streets as narrow as possible (34 feet if two-way traffic and parking on both sides)

- Provide some parallel parking on the street.

- Provide sidewalks on both sides of the street.

- Provide street trees, regularly spaced within a tree planting strip.

- Place the garage door away from the front of the house (in townhouses this normally requires rear loaded garages).

- Place utilities in alleys or lanes (if provided) or in public right-of-ways.

- Provide small front yards, i.e., bring the house closer to the street .

- Define the edges of private residences (including townhouses) with fences, walls or landscaping.

- Provide some housing types with useable front porches.

- Provide some modifiable grid to structure development, thus eliminating the single access point and the cul-de-sac.

- Allow interparcel connectivity for autos as well as pedestrians.

- Provide amenities: parks, schools, retail, etc., within walking distance.

VII. FACILITATION OF SPECIFIC DEVELOPMENT/REDEVELOPMENT PROJECTS

Many of the recommended actions and programs in the previous section will help to encourage desirable development along Richmond Highway. However, the CRAG is eager to see more development (particularly an inn; mixed-use; office and hotel/conference projects, and major reconfiguration of some existing shopping centers) than the private market is likely to create without active involvement by SFDC and/or the Fairfax County Redevelopment and Housing Authority. On priority sites, a combination of some or all of the following actions may be required and justified to attract the desired development or redevelopment:

--Increases in density and decreases in parking requirements and/or shared parking

--Site acquisition, assemblage and land lease to developer, at below market rate if necessary

--Tax exempt bond financing

--Lease of a portion of the space developed for government use

--Financing and development of site improvements, structured parking, etc.

--Tax abatement

--Other incentives if required to lower rent to market level

Given limited resources, the cost and benefit of active involvement in development/redevelopment must be weighed against the cost and benefit of other actions recommended in the previous section.

VIII. WORK PROGRAM

EXHIBIT VIII-1 on the following pages presents the key components of the work program that will be required over the next several years to implement the recommended programs and actions. It also identifies recommended responsibilities and potential funding sources. EXHIBIT VIII-2 shows the steps organized chronologically.

EXHIBIT VIII-1
RICHMOND HIGHWAY
WORK PROGRAM

PROGRAM/ACTION	STEP	BEGINNING YEAR/QTR.	LEAD RESPONSIBILITY	POTENTIAL FUNDING SOURCES
-- Revise SFDC	1 Review bylaws, etc.	1998.1	4,1,3	
	2 Make required changes	1998.2	4	
	3 Add development-oriented staff	1998.2	4	
	4 Consider service district, etc.	TBD	4,3,1	
A Coordinated Marketing	1 Devise initial marketing program	1998.1	4	4
	2 Begin public relations re revitalization	1998.2	4	4,1
	3 Develop events calendar	1998.2	4	
	4 Begin joint advertising	1998.3	4	1,4
	5 Hold first events	1999.2	4	4,1,2,3,5
B Rename Richmond Highway	1 Decide on name	1997.4	4,5a,5c	
	2 Agree to make change	1998.1	4,5,6	
	3 Change signs and publicize	1998.2	5c,4,6	5c,6
C Designate Historic Theme	1 Adopt theme	1998.1	4	
	2 Develop plan to implement	1998.1	4	
	3 Marketing, signage, etc.	ongoing	4	4,3,1,5
D Recruitment Program	1 Devise plan	1998.1	5a,5b,4	
	2 Determine respective roles	1998.1	5a,5b,4	
	3 Coordinate with brokers/owners	1998.1	5a,5b,4	
	4 Prepare information	1998.2	5a,5b,4	5b
	5 Approach prospective businesses	1998.2	5a,5b,4	5b,3,4
E Small Business Assistance	1 Discuss publicity/expansion program	1998.1	8,4	
	2 Implement program	1998.2	8,4	
F Improve Pedestrian Accessibility	1 Develop pedestrian accessibility program	1998.3	4,3,5,6	
	2 Implement program	1999.1	4,5c,3,6	6,4,3,5

EXHIBIT VIII-1
RICHMOND HIGHWAY
WORK PROGRAM

PROGRAM/ACTION	STEP	BEGINNING YEAR/QTR.	LEAD RESPONSIBILITY	POTENTIAL FUNDING SOURCES
G Bus Stops in Shopping Centers	1 Decide to proceed	1998.2	4,5,3	
	2 Implement changes	1998.4	5,8	5,8
H Ensure Access to Parcels	1 Work with VDOT consultants	1997.3	5a,5c,4	5a,5c
	2 Implement recommendations (with VDOT changes)	TBD	6	6
I Ensure Adequate Parking	1 Work with VDOT consultants	1997.3	5a,5c,4	5a,5c
	2 Implement recommendations (with VDOT changes)	TBD	6	6
J Shared Parking	1 Modify County parking code	1998.1	5	
K Consider Light Rail	1 Work with VDOT consultants	1997.3	5a,5c,4	5a,5c
L Expand Blight Abatement	1 Investigate creative approaches to expand program	1997.4	5	
	2 Seek legislative changes	1998.1	5a,1,2	
M Tax Abatement	1 Promote use of tax abatement	1997.4	5a,4	5
	2 Consider revisions to program	1999.2	5a,4	
N Intensify Code Enforcement	1 Review staff reassignment/increase	1998.1	5	
	2 Implement changes	1998.2	5	
O Acquisition/Demolition	1 Exhaust other remedies	1998.2	4	
	2 Begin acquisitions	1998.4	4,5	5
	3 Demolish	1998.4	4,5	
	4 Pursue developers	1998.4	4	
P Improve Landscaping/Street Furn.	1 Work with VDOT consultants	1997.4	5a,4	5a,5c
	2 Implement recommendations (with VDOT changes)	TBD	6	6
	3 Implement recommendations (with development)	TBD	4,5	

EXHIBIT VIII-1
RICHMOND HIGHWAY
WORK PROGRAM

PROGRAM/ACTION	STEP	BEGINNING YEAR/QTR.	LEAD RESPONSIBILITY	POTENTIAL FUNDING SOURCES
Q Revolving Loan Program	1 Decide on specific provisions of program	1998.1	5a	5
	2 Implement program	1998.3	5a	5
R Design Guidelines	1 Decide on priorities	1998.2	4,5	
	2 Develop guidelines	1998.3	4,5	4,5
	3 Implement guidelines	1998.4	5,4	
S Utility Relocation	1 Work with VDOT consultants	1997.4	5a,4	5a,5c
	2 Implement recommendations (with VDOT changes)	TBD	6	6
T Leverage Private Investment	1 Mobilize private property owners/merchants	TBD	4	4,5
U Enhance/Publicize Police	1 Evaluate need for more resources	1998.1	4,5	
	2 Devise publicity program	1998.2	4,5	
	3 Implement program	1998.2	4,5	5,4
V Business Watch Program	1 Meet with businesses	1998.2	4,5	
	2 Organize program	1998.3	4,5	
	3 Begin program	1998.3	4,5	
W Expedited Approvals	1 Establish approvals team	1998.2	5	
	2 Undertake review of approval processes	1998.2	5	
	3 Implement changes to approval processes	1999.1	5	
X Revitalization Incentive Zoning	1 Decide on priorities	1998.3	5,4	
	2 Decide on incentive zoning components	1998.4	5,4	
	3 Implement incentive zoning	1999.2	5	
Y Mixed-Use Zone	1 Discuss parameters of mixed-use zone	1998.3	5,4	
	2 Decide on details	1999.1	5	
	3 Implement	1999.2	5	

EXHIBIT VIII-1
RICHMOND HIGHWAY
WORK PROGRAM

PROGRAM/ACTION	STEP	BEGINNING YEAR/QTR.	LEAD RESPONSIBILITY	POTENTIAL FUNDING SOURCES
Z Amend Comp. Plan	1 Incorporate revitalization recs.	1997.3	5a,5	
-- Development/Redevelopment	1 Facilitate desired projects	TBD	4	

KEY: 1=business community, 2=area residents, 3=property owners, 4=revitalization entity, 5=County, (5a=Revitalization Div., 5b=EDA, 5c=OT),6=State,7=Federal

EXHIBIT VIII-2
RICHMOND HIGHWAY
WORK PROGRAM (In Chronological Order)

BEGINNING YEAR/QTR.	PROGRAM/ACTION	STEP	LEAD RESPONSIBILITY	POTENTIAL FUNDING SOURCES
1997.3	H Ensure Access to Parcels	1 Work with VDOT consultants	5a,5c,4	5a,5c
	I Ensure Adequate Parking	1 Work with VDOT consultants	5a,5c,4	5a,5c
	K Consider Light Rail	1 Work with VDOT consultants	5a,5c,4	5a,5c
	Z Amend Comp. Plan	1 Incorporate revitalization recs.	5a,5	
1997.4	B Rename Richmond Highway	1 Decide on name	4,5a,5c	
	L Expand Blight Abatement	1 Investigate creative approaches to expand program	5	
	M Tax Abatement	1 Promote use of tax abatement	5a,4	5
	P Improve Landscaping/Street Furn.	1 Work with VDOT consultants	5a,4	5a,5c
	S Utility Relocation	1 Work with VDOT consultants	5a,4	5a,5c
1998.1	-- Revise SFDC	1 Review bylaws, etc.	4,1,3	
	A Coordinated Marketing	1 Devise initial marketing program	4	4
	B Rename Richmond Highway	2 Agree to make change	4,5,6	
	C Designate Historic Theme	1 Adopt theme	4	
	C Designate Historic Theme	2 Develop plan to implement	4	
	D Recruitment Program	1 Devise plan	5a,5b,4	
	D Recruitment Program	2 Determine respective roles	5a,5b,4	
	D Recruitment Program	3 Coordinate with brokers/owners	5a,5b,4	
	E Small Business Assistance	1 Discuss publicity/expansion program	8,4	
	J Shared Parking	1 Modify County parking code	5	
	L Expand Blight Abatement	2 Seek legislative changes	5a,1,2	
	N Intensify Code Enforcement	1 Review staff reassignment/increase	5	
	Q Revolving Loan Program	1 Decide on specific provisions of program	5a	5
	U Enhance/Publicize Police	1 Evaluate need for more resources	4,5	
1998.2	-- Revise SFDC	2 Make required changes	4	
	-- Revise SFDC	3 Add development-oriented staff	4	
	A Coordinated Marketing	2 Begin public relations re revitalization	4	4,1
	A Coordinated Marketing	3 Develop events calendar	4	
	B Rename Richmond Highway	3 Change signs and publicize	5c,4,6	5c,6
	D Recruitment Program	4 Prepare information	5a,5b,4	5b
	D Recruitment Program	5 Approach prospective businesses	5a,5b,4	5b,3,4
	E Small Business Assistance	2 Implement program	8,4	

EXHIBIT VIII-2
RICHMOND HIGHWAY
WORK PROGRAM (In Chronological Order)

BEGINNING YEAR/QTR.	PROGRAM/ACTION	STEP	LEAD RESPONSIBILITY	POTENTIAL FUNDING SOURCES
1998.2	G Bus Stops in Shopping Centers	1 Decide to proceed	4,5,3	
	N Intensify Code Enforcement	2 Implement changes	5	
	O Acquisition/Demolition	1 Exhaust other remedies	4	
	R Design Guidelines	1 Decide on priorities	4,5	
	U Enhance/Publicize Police	2 Devise publicity program	4,5	
	U Enhance/Publicize Police	3 Implement program	4,5	5,4
	V Business Watch Program	1 Meet with businesses	4,5	
	W Expedited Approvals	1 Establish approvals team	5	
	W Expedited Approvals	2 Undertake review of approval processes	5	
1998.3	A Coordinated Marketing	4 Begin joint advertising	4	1,4
	F Improve Pedestrian Accessibility	1 Develop pedestrian accessibility program	4,3,5,6	
	Q Revolving Loan Program	2 Implement program	5a	5
	R Design Guidelines	2 Develop guidelines	4,5	4,5
	V Business Watch Program	2 Organize program	4,5	
	V Business Watch Program	3 Begin program	4,5	
	X Revitalization Incentive Zoning	1 Decide on priorities	5,4	
	Y Mixed-Use Zone	1 Discuss parameters of mixed-use zone	5,4	
1998.4	G Bus Stops in Shopping Centers	2 Implement changes	5,8	5,8
	O Acquisition/Demolition	2 Begin acquisitions	4,5	5
	O Acquisition/Demolition	3 Demolish	4,5	
	O Acquisition/Demolition	4 Pursue developers	4	
	R Design Guidelines	3 Implement guidelines	5,4	
	X Revitalization Incentive Zoning	2 Decide on incentive zoning components	5,4	
1999.1	F Improve Pedestrian Accessibility	2 Implement program	4,5c,3,6	6,4,3,5
	W Expedited Approvals	3 Implement changes to approval processes	5	
	Y Mixed-Use Zone	2 Decide on details	5	
1999.2	A Coordinated Marketing	5 Hold first events	4	4,1,2,3,5
	M Tax Abatement	2 Consider revisions to program	5a,4	
	X Revitalization Incentive Zoning	3 Implement incentive zoning	5	
	Y Mixed-Use Zone	3 Implement	5	

EXHIBIT VIII-2
RICHMOND HIGHWAY
WORK PROGRAM (In Chronological Order)

BEGINNING YEAR/QTR.	PROGRAM/ACTION	STEP	LEAD RESPONSIBILITY	POTENTIAL FUNDING SOURCES
ongoing	C Designate Historic Theme	3 Marketing, signage, etc.	4	4,3,1,5
TBD	-- Revise SFDC	4 Consider service district, etc.	4,3,1	
	H Ensure Access to Parcels	2 Implement recommendations (with VDOT changes)	6	6
	I Ensure Adequate Parking	2 Implement recommendations (with VDOT changes)	6	6
	P Improve Landscaping/Street Furn.	2 Implement recommendations (with VDOT changes)	6	6
	P Improve Landscaping/Street Furn.	3 Implement recommendations (with development)	4,5	
	S Utility Relocation	2 Implement recommendations (with VDOT changes)	6	6
	T Leverage Private Investment	1 Mobilize private property owners/merchants	4	4,5
	-- Development/Redevelopment	1 Facilitate desired projects	4	

KEY: 1=business community, 2=area residents, 3=property owners, 4=revitalization entity, 5=County, (5a=Revitalization Div., 5b=EDA, 5c=OT),6=State,7=Federal

APPENDIX

EXHIBIT A-1

	SIC Code	GFA	# of Bus
Veter Svcs			
Veterinary Svcs. - Animal Special	074200	12607	5
Animal Spec Svcs			
Pet Grooming	075299	3100	2
Agric Svcs			
Landscaping Services	078102	11280	1
Gn Bldg Contrt			
Commercial/Office Contractor	152101	300	1
Spec Trd Contr			
Pumping/Heating/A/C Contractors	171199	6480	1
Tile/Marble Work	174300	1168	1
Roofing/Siding/Sheet Metal Work	176199	1100	1
		8748	3
Printing/Publs			
Commercial Printing/Lithographic, Nec	275299	5000	3
Fabricat Metal			
Etching & Engraving Plants	347901	9660	1
Mics Mfg Indus			
Sign & Advertising Specialty Mfts	399399	1465	1
Passenger Trns			
Local Rental Transport	411901	3765	2
Mail Trns			
U.S. Postal Service	4311	7500	1
Transport Svcs			
Travel Agencies	4724	2203	2
Transportation Ticket Offices	472901	1168	1
		3371	3
Whole-Durable			
Automotive Supplies & Parts, Whls	501301	11192	3
Tile & Clay Prod. Whls	503203	3320	1
Telephone & Telegraphic Equipment Whls	506501	111702	2
Radio & Television Equip, Whls	506594	2000	1
Electronic Parts & Equip, Whls	506599	2000	1
Beauty Salon Barber Equip Supplies	508701	4200	2
Durable Good, Misc., Whls.	509999	2000	1
		136414	11
Whole-Non-Durable			
Stationary & Greeting Cards, Whls.	511202	10010	1
Fish & Seafood, Whls.	514600	2628	1
Wine and Alcohol Beverages, Whls	5182	7000	1
		19638	3

EXHIBIT A-1

Bldg Supplies			
Lumber/Building Materials, Nec, Retail	521199	83023	2
Paint Supplies, Retail	523102	18528	3
Hardware Stores, Nec.	525199	25000	1
Lawn & Garden Supplies, Retail	526199	9400	2
Mobil Home Dealers	527100	1600	1
		137551	9
General Merch			
Departments Stores	531100	303762	3
Variety Stores	533100	11656	3
General Merchandise Stores	539900	104936	1
		420354	7
Food Stores			
Convenience Store	541199	327413	22
Bakeries, Retail	546100	13473	2
Health & Dietetic Food Stores	549901	3114	1
		344000	25
Auto Dlrs/Gas			
Car & Truck Dealers	551100	226503	9
Auto & Truck Equipment Parts	553101	52614	9
Auto & Home Supply Stores	553199	14539	3
Gasoline Service Stations	554100	23268	15
		316924	36
Apparel Store			
Clothing Stores, Specialty Woman's	562101	1152	1
Clothing Stores, Nec, Woman's	562199	65041	3
Shoe Stores, Nec	566199	1600	1
Apparel & Accessory Stores, Misc.	569904	4250	3
		72043	8
Home Furniture			
Beds & Accessories, retail	571201	3555	1
Furniture Stores, Nec	571299	53000	1
Floor Covering Stores	571300	23045	5
Appliance Stores, Household Electric	572202	10980	2
Antennas, Retail	573101	1269	1
		91849	10
Eat/Drink Place			
Ice Cream And Soda Fountain Stands	581202	504	1
Fast Food Restaurant Stands	581203	2643	1
Pizza Restaurants	581206	6050	2
Eating Places	581299	306584	70
		315781	74

EXHIBIT A-1

Misc Retail			
Drug Store and Proprietary Stores	5912	67914	6
Home Furnish & Appliances Uses	593201	1200	1
Antique Stores	593202	15896	1
Used Merchandise Stores, Nec	593299	7732	3
Water Sports Equipment	594105	2000	1
Sporting Goods & Bicycle Shops	594199	8874	2
Book Stores	5942	7507	4
Stationary Stores	594300	40000	2
Jewelry Stores	594499	4200	2
Hobby & Craft Supplies, Retail	594501	71500	2
Gifts & Novelties, Retail	594701	35003	18
Fabric Stores, retail	594901	8500	1
Bottled Gas Dealers	598400	2653	2
Florists, Retail	599200	5000	3
New Dealers & New Stands	5994	3047	2
Art & Architectural Supplies, Retail	599902	5524	1
Pets and Pet Supplies	599911	18850	1
Cosmetic & Beauty Supplies Store	599913	1200	1
Art, Picture Frame & Decoration	599916	2620	2
Retail Stores, Misc., Nec	599999	4000	1
		313220	56
Deposit Inst			
Banks, National Commercial	602100	39354	14
Credit Unions	606100	30432	3
Deposit Banking Services	609999	5800	2
		75586	19
Insur Agents			
Insurance Agents, Brokers & Services	641199	15887	6
Real Estate			
Property Operators, Retail Establish	651202	2525	1
Apartment Building Operators	651300	1593000	8
Real Estate Brokers & Agents	653101	11586	7
Real Estate Managers	653102	4500	2
Real Estate Agents & Managers, Nec.	653199	3152	3
		1614763	21
Hotels/Lodging			
Motels	701101	138113	10
Hotels Motels, Nec	701199	345933	8
		484046	18
Personal Svcs			
Cleaner & Dryers	721200	31986	13
Laundries & Cleaners	721500	2000	1
Accessory Cleaning & Repair	721902	2000	1
Photographic Studios	722100	2000	1
Cosmetology & Personal Hygiene Salons	723101	3968	4

EXHIBIT A-1

Beauty Shops, Nec	723199	34685	28
Barber Shops	724100	3470	3
Shoe Repair Services	725101	3582	2
Tax Return Preparation	729100	3000	1
Person Appearance Svcs	729901	3360	2
		90051	56
Business Svcs			
Advertising Agencies	7311	1168	1
Adjustment and Collection Services	7322	10270	1
Photocopying and Duplicating Services	733400	1650	1
Home Cleaning and Maint. Equip., Rental	735901	1302	1
Home Appliances, Furniture, Etc. Rental	735907	4200	2
Equipment Rental and Leasing, Misc.	735999	21612	6
Computer Related Services Nec	737999	2320	1
Security Systems Services	738200	2800	2
Film Development Services	738401	800	1
Packaging and Label Services	738912	1737	2
Business Services, Misc.	738999	1203	1
		47859	19
Auto Repair			
Automobile Rental	751400	8800	1
Automobile Repair Services	753204	4500	2
Auto Body Repair and Paint Shops	753299	1533	1
Automobile Repair Shops, General	753899	25878	8
Automotive Powetrain Components Repair	753902	1850	1
Automotive Break Services	753904	4170	2
Automotive Repair Shops, Nec	753999	12900	4
Car Washes	754200	10880	3
Customizing Services Auto, Nec	754902	2500	1
Automotive Svcs, Exc Repair & Carwash	754999	1584	1
		74595	24
Mics Repair			
Home Entertainment Repair Services	762203	2852	3
Refrigeration and A/C Repair Shops	762300	4600	1
Upholstery Work	764101	5742	2
Welding Repairs	769200	2478	1
Waste Cleaning Services	769904	1001	1
Lock & Key Svcs.	769911	1548	2
Repair Shops & Related Services	769999	1998	1
		20219	11
Motion Picture			
Motion Picture Theaters, Exc Drive-In	783200	55093	2
Video Tape Rental	784100	10013	3
		65106	5

EXHIBIT A-1

Amusement Svcs			
Dance Instructors & School Services	791102	7376	2
Bowling Centers	7933	38132	1
Physical Fitness Clubs	799101	26152	2
Weight Reducing Clubs	799102	1200	1
Gold Services & Professionals	799902	9375	1
Table Sports Parlors	799904	6400	1
Instruction Schools, Camps, & Svcs.	799911	3200	1
Riding and Rodeo Services	799912	1080	1
		92915	10
Health Svcs			
Medical Centers	801102	1168	1
Medical Insurance Associations	801103	2000	1
Physicians & Surgeons	801105	5000	2
Dental Clinics & Offices	802102	19800	7
Chiropractors	804100	6152	2
		34120	13
Legal Svcs			
Schools, Elementary & Secondary	811199	1000	1
Social Services			
Rehabilitative Services	832204	6152	2
Social Services	839999	2000	1
		8152	3
Membership Org			
Business Associations	861199	1700	2
Churches, Temples & Shrines	866101	37134	9
Organizations, Membership, Misc.	869999	15665	2
		54499	13
Engin/Arch/Account			
Architectural Svcs	871299	1800	1
Auditing Svcs	872101	1968	2
Accounting Svcs	872102	3142	3
		6910	6
Exec/Gen Govt			
Executive Offices, State & Local Govt.	911102	52420	4
Government, Nec	919999	37234	6
		89654	10
Human Resource			
Administration Public Health Programs	943100	4050	1
Water Vessels & Port Reg. Agencies			
Water Vessels & Port Reg. Agencies	962103	11100	2
National Security			
National Security	971100	4354	2
TOTAL		5024436	502

EXHIBIT A-2
ESTIMATED RETAIL DEMAND POTENTIAL
RICHMOND HIGHWAY -- SUBAREA A
AS IS

	Subarea Potential Expenditures Per Capita	1996 Total Retail Expenditures	1996 Richmond Highway Estimated Current Capture Rate	1996 Richmond Highway Estimated Current Retail Sales
Men's	$138	$8,411,428	25%	$2,102,857
Boys'	$31	$1,892,237	35%	$662,283
Women's	$234	$14,250,435	30%	$4,275,131
Girls'	$39	$2,363,321	35%	$827,162
Infants'	$29	$1,754,863	40%	$701,945
Footwear	$152	$9,225,339	25%	$2,306,335
Apparel & Footwear Repair	$6	$364,710	80%	$291,768
Dry Cleaning and Laundry	$68	$4,146,753	90%	$3,732,077
APPAREL AND RELATED SUBTOTAL:	**$698**	**$42,409,087**	**35%**	**$14,899,558**
Food	$1,148	$69,758,082	95%	$66,270,178
Alcoholic Beverages	$150	$9,142,672	85%	$7,771,271
Food & Alcohol Away From Home	$754	$45,849,518	76%	$34,845,633
Household Supplies	$185	$11,222,735	95%	$10,661,598
FOOD AND GROCERY SUBTOTAL:	**$2,237**	**$135,973,006**	**88%**	**$119,548,680**
Drugs and Medical Equipment	$150	$9,124,436	95%	$8,668,215
Personal Care Services	$88	$5,322,942	60%	$3,193,765
Cosmetics	$41	$2,495,832	60%	$1,497,499
Toiletries and Other Hygiene	$50	$3,014,936	95%	$2,864,189
HEALTH & PERSONAL CARE SUBTOTAL:	**$328**	**$19,958,147**	**81%**	**$16,223,668**
Furniture	$184	$11,181,401	50%	$5,590,700
Appliances	$112	$6,824,332	25%	$1,706,083
Carpeting and Window Coverings	$62	$3,743,140	85%	$3,181,669
Other Home Furnishings	$136	$8,289,250	60%	$4,973,550
HOME FURNISHING SUBTOTAL:	**$494**	**$30,038,123**	**51%**	**$15,452,003**

EXHIBIT A-2
ESTIMATED RETAIL DEMAND POTENTIAL
RICHMOND HIGHWAY -- SUBAREA A
AS IS

	Subarea Potential Expenditures Per Capita	1996 Total Retail Expenditures	1996 Richmond Highway Estimated Current Capture Rate	1996 Richmond Highway Estimated Current Retail Sales
Televisions, VCR's, Sound Equipment	$172	$10,465,961	25%	$2,616,490
Video Tapes, CD's, Tapes, Etc.	$66	$4,009,986	45%	$1,804,494
Computer Equipment	$27	$1,643,626	15%	$246,544
Other Household Electronic Equipment	$13	$784,127	65%	$509,682
ELECTRONICS SUBTOTAL:	**$278**	**$16,903,701**	**31%**	**$5,177,210**
Reading Materials	$99	$5,999,480	50%	$2,999,740
Recreation and Sporting Equipment	$38	$2,280,045	45%	$1,026,020
Pet Supplies	$41	$2,514,675	75%	$1,886,007
Entertainment	$102	$6,208,580	20%	$1,241,716
Tobacco	$113	$6,897,882	95%	$6,552,988
Flowers and Gardening	$75	$4,541,247	80%	$3,632,998
Photographic Supplies and Equipment	$32	$1,951,199	90%	$1,756,079
Optical Goods	$28	$1,671,588	0%	$0
Jewelry and Accessories	$94	$5,695,555	35%	$1,993,444
Toys and Hobbies (inc. Video Games)	$41	$2,484,283	45%	$1,117,927
MISCELLANEOUS SUBTOTAL:	**$662**	**$40,244,533**	**55%**	**$22,206,918**
OTHER	**$318**	**$19,349,716**	**85%**	**$16,447,259**
SUBTOTAL	**$5,016**	**$304,876,312**	**69%**	**$209,955,297**

EXHIBIT A-2
ESTIMATED RETAIL DEMAND POTENTIAL
RICHMOND HIGHWAY -- SUBAREA B
AS IS

	Subarea Potential Expenditures Per Capita	1996 Total Retail Expenditures	1996 Richmond Highway Estimated Current Capture Rate	Retail Sales
Men's	$143	$3,893,601	10%	$389,360
Boys'	$31	$830,060	17%	$141,110
Women's	$241	$6,542,249	12%	$785,070
Girls'	$39	$1,049,310	17%	$178,383
Infants'	$27	$745,127	23%	$171,379
Footwear	$153	$4,149,756	9%	$373,478
Apparel & Footwear Repair	$6	$172,036	12%	$20,644
Dry Cleaning and Laundry	$64	$1,749,393	12%	$209,927
APPAREL AND RELATED SUBTOTAL:	**$705**	**$19,131,532**	**12%**	**$2,269,352**
Food	$1,122	$30,449,812	65%	$19,792,378
Alcoholic Beverages	$150	$4,075,677	55%	$2,241,622
Food & Alcohol Away From Home	$754	$20,468,745	43%	$8,801,560
Household Supplies	$184	$4,980,358	65%	$3,237,233
FOOD AND GROCERY SUBTOTAL:	**$2,210**	**$59,974,591**	**57%**	**$34,072,793**
Drugs and Medical Equipment	$150	$4,071,878	65%	$2,646,721
Personal Care Services	$88	$2,396,563	10%	$239,656
Cosmetics	$40	$1,097,882	25%	$274,471
Toiletries and Other Hygiene	$49	$1,326,902	65%	$862,486
HEALTH & PERSONAL CARE SUBTOTAL:	**$328**	**$8,893,225**	**45%**	**$4,023,334**
Furniture	$190	$5,155,107	23%	$1,185,675
Appliances	$116	$3,153,630	9%	$283,827
Carpeting and Window Coverings	$68	$1,835,140	45%	$825,813
Other Home Furnishings	$143	$3,891,973	35%	$1,362,191
HOME FURNISHING SUBTOTAL:	**$517**	**$14,035,850**	**26%**	**$3,657,505**

EXHIBIT A-2
ESTIMATED RETAIL DEMAND POTENTIAL
RICHMOND HIGHWAY -- SUBAREA B
AS IS

	Subarea Potential Expenditures Per Capita	1996 Total Retail Expenditures	1996 Richmond Highway Estimated Current Capture Rate	1996 Richmond Highway Estimated Current Retail Sales
Televisions, VCR's, Sound Equipment	$172	$4,665,863	9%	$419,928
Video Tapes, CD's, Tapes, Etc.	$67	$1,805,563	17%	$306,946
Computer Equipment	$28	$766,021	5%	$38,301
Other Household Electronic Equipment	$13	$354,112	29%	$102,692
ELECTRONICS SUBTOTAL:	**$280**	**$7,591,559**	**11%**	**$867,867**
Reading Materials	$101	$2,727,610	25%	$681,903
Recreation and Sporting Equipment	$40	$1,076,717	25%	$269,179
Pet Supplies	$45	$1,215,377	35%	$425,382
Entertainment	$109	$2,947,946	7%	$206,356
Tobacco	$113	$3,056,758	65%	$1,986,893
Flowers and Gardening	$82	$2,221,542	65%	$1,444,003
Photographic Supplies and Equipment	$34	$913,364	45%	$411,014
Optical Goods	$29	$793,970	0%	$0
Jewelry and Accessories	$96	$2,603,603	15%	$390,540
Toys and Hobbies (inc. Video Games)	$42	$1,135,328	25%	$283,832
MISCELLANEOUS SUBTOTAL:	**$689**	**$18,692,216**	**33%**	**$6,099,101**
OTHER	**$320**	**$8,686,787**	**50%**	**$4,343,394**
SUBTOTAL	**$5,049**	**$137,005,760**	**40%**	**$55,333,345**

EXHIBIT A-2
ESTIMATED RETAIL DEMAND POTENTIAL
RICHMOND HIGHWAY-- SUBAREA FRANCONIA
AS IS

	Subarea Potential Expenditures Per Capita	1996 Total Retail Expenditures	1996 Richmond Highway Estimated Current Capture Rate	1996 Richmond Highway Estimated Current Retail Sales
Men's	$143	$5,830,575	1%	$58,306
Boys'	$31	$1,270,458	1%	$12,705
Women's	$238	$9,712,462	1%	$97,125
Girls'	$39	$1,606,720	1%	$16,067
Infants'	$26	$1,072,369	1%	$10,724
Footwear	$153	$6,230,013	1%	$62,300
Apparel & Footwear Repair	$6	$253,929	2%	$5,079
Dry Cleaning and Laundry	$65	$2,657,894	2%	$53,158
APPAREL AND RELATED SUBTOTAL:	**$703**	**$28,634,420**	**1%**	**$315,462**
Food	$1,133	$46,189,322	30%	$13,856,796
Alcoholic Beverages	$150	$6,130,969	25%	$1,532,742
Food & Alcohol Away From Home	$755	$30,792,202	16%	$4,926,752
Household Supplies	$184	$7,509,031	30%	$2,252,709
FOOD AND GROCERY SUBTOTAL:	**$2,223**	**$90,621,523**	**25%**	**$22,569,000**
Drugs and Medical Equipment	$151	$6,134,637	30%	$1,840,391
Personal Care Services	$87	$3,561,114	3%	$106,833
Cosmetics	$41	$1,659,706	10%	$165,971
Toiletries and Other Hygiene	$49	$2,002,897	30%	$600,869
HEALTH & PERSONAL CARE SUBTOTAL:	**$328**	**$13,358,355**	**20%**	**$2,714,064**
Furniture	$190	$7,744,210	3%	$232,326
Appliances	$115	$4,701,958	2%	$94,039
Carpeting and Window Coverings	$66	$2,704,767	3%	$81,143
Other Home Furnishings	$142	$5,797,968	2%	$115,959
HOME FURNISHING SUBTOTAL:	**$514**	**$20,948,903**	**2%**	**$523,468**

EXHIBIT A-2
ESTIMATED RETAIL DEMAND POTENTIAL
RICHMOND HIGHWAY-- SUBAREA FRANCONIA
AS IS

	Subarea Potential Expenditures Per Capita	1996 Total Retail Expenditures	1996 Richmond Highway Estimated Current Capture Rate	1996 Richmond Highway Estimated Current Retail Sales
Televisions, VCR's, Sound Equipment	$174	$7,084,729	2%	$141,695
Video Tapes, CD's, Tapes, Etc.	$67	$2,738,190	2%	$54,764
Computer Equipment	$28	$1,159,594	2%	$23,192
Other Household Electronic Equipment	$13	$533,535	7%	$37,347
ELECTRONICS SUBTOTAL:	**$283**	**$11,516,048**	**2%**	**$256,998**
Reading Materials	$101	$4,106,877	7%	$287,481
Recreation and Sporting Equipment	$40	$1,625,061	4%	$65,002
Pet Supplies	$44	$1,796,657	5%	$89,833
Entertainment	$108	$4,403,602	1%	$44,036
Tobacco	$113	$4,589,871	30%	$1,376,961
Flowers and Gardening	$79	$3,224,444	6%	$193,467
Photographic Supplies and Equipment	$34	$1,371,948	13%	$178,353
Optical Goods	$29	$1,172,636	0%	$0
Jewelry and Accessories	$97	$3,933,651	5%	$196,683
Toys and Hobbies (inc. Video Games)	$42	$1,714,731	7%	$120,031
MISCELLANEOUS SUBTOTAL:	**$685**	**$27,939,479**	**9%**	**$2,551,848**
OTHER	**$321**	**$13,091,836**	**5%**	**$654,592**
SUBTOTAL	**$5,057**	**$206,110,564**	**14%**	**$29,585,432**

demand as is

EXHIBIT A-2
ESTIMATED RETAIL DEMAND POTENTIAL
RICHMOND HIGHWAY-- TOTAL 3 SUBAREAS
AS IS

	SALES FROM PMA RESIDENTS			ADD'L SALES FROM NON-PMA RESIDENTS	TOTAL SALES POTENTIAL	SIC CODE DISTRIBUTION %						SIC CODE DISTRIBUTION $					
	SUBAREA A	SUBAREA B	SUBAREA FRAN.			52	53/56	54	57	58	59	52	53/56	54	57	58	59
Men's	$2,102,857	$389,360	$58,306	$433,589	$2,984,112		100%					$0	$2,984,112	$0	$0	$0	$0
Boys'	$662,283	$141,110	$12,705	$138,737	$954,834		100%					$0	$954,834	$0	$0	$0	$0
Women's	$4,275,131	$785,070	$97,125	$876,745	$6,034,070		100%					$0	$6,034,070	$0	$0	$0	$0
Girls'	$827,162	$178,383	$16,067	$173,674	$1,195,286		100%					$0	$1,195,286	$0	$0	$0	$0
Infants'	$701,945	$171,379	$10,724	$150,288	$1,034,336		100%					$0	$1,034,336	$0	$0	$0	$0
Footwear	$2,306,335	$373,478	$62,300	$466,159	$3,208,272		100%					$0	$3,208,272	$0	$0	$0	$0
Apparel & Footwear Repair	$291,768	$20,644	$5,079	$53,973	$371,464		0%					$0	$0	$0	$0	$0	$0
Dry Cleaning and Laundry	$3,732,077	$209,927	$53,158	$679,178	$4,674,340		0%					$0	$0	$0	$0	$0	$0
APPAREL AND RELATED SUBTOTAL:	$14,899,558	$2,269,352	$315,462	$2,972,343	$20,456,716												
Food	$66,270,178	$19,792,378	$13,856,796	$16,986,290	$116,905,641		5%	90%			5%	$0	$5,845,282	$105,215,077	$0	$0	$5,845,282
Alcoholic Beverages	$7,771,271	$2,241,622	$1,532,742	$1,962,758	$13,508,394			50%			50%	$0	$0	$6,754,197	$0	$0	$6,754,197
Food & Alcohol Away From Home	$34,845,633	$8,801,560	$4,926,752	$10,686,268	$59,260,214					100%		$0	$0	$0	$0	$59,260,214	$0
Household Supplies	$10,661,598	$3,237,233	$2,252,709	$2,745,762	$18,897,301	20%	60%	20%				$3,779,460	$11,338,381	$3,779,460	$0	$0	$0
FOOD AND GROCERY SUBTOTAL:	$119,548,680	$34,072,793	$22,569,000	$32,381,078	$208,571,550												
Drugs and Medical Equipment	$8,668,215	$2,646,721	$1,840,391	$2,236,405	$15,391,732		15%	10%			75%	$0	$2,308,760	$1,539,173	$0	$0	$11,543,799
Personal Care Services	$3,193,765	$239,656	$106,833	$601,843	$4,142,099							$0	$0	$0	$0	$0	$0
Cosmetics	$1,497,499	$274,471	$165,971	$329,450	$2,267,390		25%	2%			73%	$0	$566,848	$45,348	$0	$0	$1,655,195
Toiletries and Other Hygiene	$2,864,189	$862,486	$600,869	$735,683	$5,063,227		30%	10%			60%	$0	$1,518,968	$506,323	$0	$0	$3,037,936
HEALTH & PERSONAL CARE SUBTOTAL:	$16,223,668	$4,023,334	$2,714,064	$3,903,381	$26,864,448												
Furniture	$5,590,700	$1,185,675	$232,326	$1,191,479	$8,200,181				100%			$0	$0	$0	$8,200,181	$0	$0
Appliances	$1,706,083	$283,827	$94,039	$354,271	$2,438,220		100%					$0	$2,438,220	$0	$0	$0	$0
Carpeting and Window Coverings	$3,181,669	$825,813	$81,143	$695,066	$4,783,692	10%	5%		85%			$478,369	$239,185	$0	$4,066,138	$0	$0
Other Home Furnishings	$4,973,550	$1,362,191	$115,959	$1,096,789	$7,548,489		90%		10%			$0	$6,793,640	$0	$754,849	$0	$0
HOME FURNISHING SUBTOTAL:	$15,452,003	$3,657,505	$523,468	$3,337,606	$22,970,582												

demand as is

EXHIBIT A-2
ESTIMATED RETAIL DEMAND POTENTIAL
RICHMOND HIGHWAY-- TOTAL 3 SUBAREAS
AS IS

	SALES FROM PMA RESIDENTS			ADD'L SALES FROM NON-PMA RESIDENTS	TOTAL SALES POTENTIAL	SIC CODE DISTRIBUTION %						SIC CODE DISTRIBUTION $					
	SUBAREA A	SUBAREA B	SUBAREA FRAN.			52	53/56	54	57	58	59	52	53/56	54	57	58	59
Televisions, VCR's, Sound Equipment	$2,616,490	$419,928	$141,695	$540,279	$3,718,392		100%					$0	$3,718,392	$0	$0	$0	$0
Video Tapes, CD's, Tapes, Etc.	$1,804,494	$306,946	$54,764	$368,255	$2,534,458		100%					$0	$2,534,458	$0	$0	$0	$0
Computer Equipment	$246,544	$38,301	$23,192	$52,366	$360,403						100%	$0	$0	$0	$0	$0	$360,403
Other Household Electronic Equipment	$509,682	$102,692	$37,347	$110,453	$760,175		95%				5%	$0	$722,166	$0	$0	$0	$38,009
ELECTRONICS SUBTOTAL:	$5,177,210	$867,867	$256,998	$1,071,353	$7,373,428												
Reading Materials	$2,999,740	$681,903	$287,481	$674,751	$4,643,875		80%	20%				$0	$3,715,100	$928,775	$0	$0	$0
Recreation and Sporting Equipment	$1,026,020	$269,179	$65,002	$231,234	$1,591,436		100%					$0	$1,591,436	$0	$0	$0	$0
Pet Supplies	$1,886,007	$425,382	$89,833	$408,208	$2,809,429		10%	40%			50%	$0	$280,943	$1,123,772	$0	$0	$1,404,714
Entertainment	$1,241,716	$206,356	$44,036	$253,658	$1,745,767							$0	$0	$0	$0	$0	$0
Tobacco	$6,552,988	$1,986,893	$1,376,961	$1,685,863	$11,602,705		10%	50%			40%	$0	$1,160,270	$5,801,352	$0	$0	$4,641,082
Flowers and Gardening	$3,632,998	$1,444,003	$193,467	$895,979	$6,166,447	60%	30%	10%				$3,699,868	$1,849,934	$616,645	$0	$0	$0
Photographic Supplies and Equipment	$1,756,079	$411,014	$178,353	$398,726	$2,744,172		80%	10%			10%	$0	$2,195,337	$274,417	$0	$0	$274,417
Optical Goods	$0	$0	$0	$0	$0						100%	$0	$0	$0	$0	$0	$0
Jewelry and Accessories	$1,993,444	$390,540	$196,683	$438,713	$3,019,381		90%				10%	$0	$2,717,442	$0	$0	$0	$301,938
Toys and Hobbies (inc. Video Games)	$1,117,927	$283,832	$120,031	$258,704	$1,780,495		90%				10%	$0	$1,602,446	$0	$0	$0	$178,050
MISCELLANEOUS SUBTOTAL:	$22,206,918	$6,099,101	$2,551,848	$5,245,837	$36,103,705												
OTHER	$16,447,259	$4,343,394	$654,592	$3,645,691	$25,090,935	85%					15%	$21,327,295					$3,763,640
SUBTOTAL	$209,955,297	$55,333,345	$29,585,432	$52,557,290	$347,431,363							$29,284,992	$68,548,119	$126,584,539	$13,021,167	$59,260,214	$39,798,662

SOURCE: Claritas; Robert Charles Lesser & Co.

EXHIBIT A-3
ESTIMATED RETAIL DEMAND POTENTIAL
RICHMOND HIGHWAY -- SUBAREA A
NEIGHBORHOOD CENTER

	Subarea Potential Expenditures Per Capita	1996 Total Retail Expenditures	1996 Richmond Highway Estimated Current Capture Rate	1996 Richmond Highway Estimated Current Retail Sales
Men's	$138	$8,411,428	0%	$0
Boys'	$31	$1,892,237	0%	$0
Women's	$234	$14,250,435	0%	$0
Girls'	$39	$2,363,321	0%	$0
Infants'	$29	$1,754,863	0%	$0
Footwear	$152	$9,225,339	0%	$0
Apparel & Footwear Repair	$6	$364,710	0%	$0
Dry Cleaning and Laundry	$68	$4,146,753	5%	$207,338
APPAREL AND RELATED SUBTOTAL:	**$698**	**$42,409,087**	**0%**	**$207,338**
Food	$1,148	$69,758,082	11%	$7,673,389
Alcoholic Beverages	$150	$9,142,672	10%	$914,267
Food & Alcohol Away From Home	$754	$45,849,518	2%	$916,990
Household Supplies	$185	$11,222,735	11%	$1,234,501
FOOD AND GROCERY SUBTOTAL:	**$2,237**	**$135,973,006**	**8%**	**$10,739,147**
Drugs and Medical Equipment	$150	$9,124,436	11%	$1,003,688
Personal Care Services	$88	$5,322,942	0%	$0
Cosmetics	$41	$2,495,832	3%	$74,875
Toiletries and Other Hygiene	$50	$3,014,936	7%	$211,046
HEALTH & PERSONAL CARE SUBTOTAL:	**$328**	**$19,958,147**	**6%**	**$1,289,608**
Furniture	$184	$11,181,401	0%	$0
Appliances	$112	$6,824,332	0%	$0
Carpeting and Window Coverings	$62	$3,743,140	0%	$0
Other Home Furnishings	$136	$8,289,250	0%	$0
HOME FURNISHING SUBTOTAL:	**$494**	**$30,038,123**	**0%**	**$0**

EXHIBIT A-3
ESTIMATED RETAIL DEMAND POTENTIAL
RICHMOND HIGHWAY -- SUBAREA A
NEIGHBORHOOD CENTER

	Subarea Potential Expenditures Per Capita	1996 Total Retail Expenditures	1996 Richmond Highway Estimated Current Capture Rate	1996 Richmond Highway Estimated Current Retail Sales
Televisions, VCR's, Sound Equipment	$172	$10,465,961	0%	$0
Video Tapes, CD's, Tapes, Etc.	$66	$4,009,986	0%	$0
Computer Equipment	$27	$1,643,626	0%	$0
Other Household Electronic Equipment	$13	$784,127	0%	$0
ELECTRONICS SUBTOTAL:	**$278**	**$16,903,701**	**0%**	**$0**
Reading Materials	$99	$5,999,480	3%	$179,984
Recreation and Sporting Equipment	$38	$2,280,045	0%	$0
Pet Supplies	$41	$2,514,675	4%	$100,587
Entertainment	$102	$6,208,580	0%	$0
Tobacco	$113	$6,897,882	11%	$758,767
Flowers and Gardening	$75	$4,541,247	4%	$181,650
Photographic Supplies and Equipment	$32	$1,951,199	3%	$58,536
Optical Goods	$28	$1,671,588	0%	$0
Jewelry and Accessories	$94	$5,695,555	0%	$0
Toys and Hobbies (inc. Video Games)	$41	$2,484,283	0%	$0
MISCELLANEOUS SUBTOTAL:	**$662**	**$40,244,533**	**3%**	**$1,279,524**
OTHER	**$318**	**$19,349,716**	**1%**	$193,497
SUBTOTAL	**$5,016**	**$304,876,312**	**4%**	**$13,709,115**

EXHIBIT A-3
ESTIMATED RETAIL DEMAND POTENTIAL
RICHMOND HIGHWAY -- SUBAREA B
NEIGHBORHOOD CENTER

	Subarea Potential Expenditures Per Capita	1996 Total Retail Expenditures	1996 Richmond Highway Estimated Current Capture Rate	Retail Sales
Men's	$143	$3,893,601	0%	$0
Boys'	$31	$830,060	0%	$0
Women's	$241	$6,542,249	0%	$0
Girls'	$39	$1,049,310	0%	$0
Infants'	$27	$745,127	0%	$0
Footwear	$153	$4,149,756	0%	$0
Apparel & Footwear Repair	$6	$172,036	0%	$0
Dry Cleaning and Laundry	$64	$1,749,393	10%	$174,939
APPAREL AND RELATED SUBTOTAL:	**$705**	**$19,131,532**	**1%**	**$174,939**
Food	$1,122	$30,449,812	28%	$8,525,947
Alcoholic Beverages	$150	$4,075,677	20%	$815,135
Food & Alcohol Away From Home	$754	$20,468,745	4%	$818,750
Household Supplies	$184	$4,980,358	28%	$1,394,500
FOOD AND GROCERY SUBTOTAL:	**$2,210**	**$59,974,591**	**19%**	**$11,554,333**
Drugs and Medical Equipment	$150	$4,071,878	28%	$1,140,126
Personal Care Services	$88	$2,396,563	0%	$0
Cosmetics	$40	$1,097,882	4%	$43,915
Toiletries and Other Hygiene	$49	$1,326,902	20%	$265,380
HEALTH & PERSONAL CARE SUBTOTAL:	**$328**	**$8,893,225**	**16%**	**$1,449,421**
Furniture	$190	$5,155,107	0%	$0
Appliances	$116	$3,153,630	0%	$0
Carpeting and Window Coverings	$68	$1,835,140	0%	$0
Other Home Furnishings	$143	$3,891,973	0%	$0
HOME FURNISHING SUBTOTAL:	**$517**	**$14,035,850**	**0%**	**$0**

EXHIBIT A-3
ESTIMATED RETAIL DEMAND POTENTIAL
RICHMOND HIGHWAY -- SUBAREA B
NEIGHBORHOOD CENTER

	Subarea Potential Expenditures Per Capita	1996 Total Retail Expenditures	1996 Richmond Highway Estimated Current Capture Rate	1996 Richmond Highway Estimated Current Retail Sales
Televisions, VCR's, Sound Equipment	$172	$4,665,863	0%	$0
Video Tapes, CD's, Tapes, Etc.	$67	$1,805,563	0%	$0
Computer Equipment	$28	$766,021	0%	$0
Other Household Electronic Equipment	$13	$354,112	0%	$0
ELECTRONICS SUBTOTAL:	**$280**	**$7,591,559**	**0%**	**$0**
Reading Materials	$101	$2,727,610	4%	$109,104
Recreation and Sporting Equipment	$40	$1,076,717	0%	$0
Pet Supplies	$45	$1,215,377	6%	$72,923
Entertainment	$109	$2,947,946	0%	$0
Tobacco	$113	$3,056,758	28%	$855,892
Flowers and Gardening	$82	$2,221,542	4%	$88,862
Photographic Supplies and Equipment	$34	$913,364	8%	$73,069
Optical Goods	$29	$793,970	0%	$0
Jewelry and Accessories	$96	$2,603,603	0%	$0
Toys and Hobbies (inc. Video Games)	$42	$1,135,328	0%	$0
MISCELLANEOUS SUBTOTAL:	**$689**	**$18,692,216**	**6%**	**$1,199,850**
OTHER	**$320**	**$8,686,787**	**1%**	**$86,868**
SUBTOTAL	**$5,049**	**$137,005,760**	**11%**	**$14,465,411**

EXHIBIT A-3
ESTIMATED RETAIL DEMAND POTENTIAL
RICHMOND HIGHWAY-- SUBAREA FRANCONIA
NEIGHBORHOOD CENTER

	Subarea Potential Expenditures Per Capita	1996 Total Retail Expenditures	1996 Richmond Highway Estimated Current Capture Rate	1996 Richmond Highway Estimated Current Retail Sales
Men's	$143	$5,830,575	0%	$0
Boys'	$31	$1,270,458	0%	$0
Women's	$238	$9,712,462	0%	$0
Girls'	$39	$1,606,720	0%	$0
Infants'	$26	$1,072,369	0%	$0
Footwear	$153	$6,230,013	0%	$0
Apparel & Footwear Repair	$6	$253,929	0%	$0
Dry Cleaning and Laundry	$65	$2,657,894	0%	$0
APPAREL AND RELATED SUBTOTAL:	**$703**	**$28,634,420**	**0%**	**$0**
Food	$1,133	$46,189,322	3%	$1,385,680
Alcoholic Beverages	$150	$6,130,969	2%	$122,619
Food & Alcohol Away From Home	$755	$30,792,202	1%	$307,922
Household Supplies	$184	$7,509,031	3%	$225,271
FOOD AND GROCERY SUBTOTAL:	**$2,223**	**$90,621,523**	**2%**	**$2,041,492**
Drugs and Medical Equipment	$151	$6,134,637	3%	$184,039
Personal Care Services	$87	$3,561,114	0%	$0
Cosmetics	$41	$1,659,706	0%	$0
Toiletries and Other Hygiene	$49	$2,002,897	2%	$40,058
HEALTH & PERSONAL CARE SUBTOTAL:	**$328**	**$13,358,355**	**2%**	**$224,097**
Furniture	$190	$7,744,210	0%	$0
Appliances	$115	$4,701,958	0%	$0
Carpeting and Window Coverings	$66	$2,704,767	0%	$0
Other Home Furnishings	$142	$5,797,968	0%	$0
HOME FURNISHING SUBTOTAL:	**$514**	**$20,948,903**	**0%**	**$0**

EXHIBIT A-3
ESTIMATED RETAIL DEMAND POTENTIAL
RICHMOND HIGHWAY-- SUBAREA FRANCONIA
NEIGHBORHOOD CENTER

	Subarea Potential Expenditures Per Capita	1996 Total Retail Expenditures	1996 Richmond Highway Estimated Current Capture Rate	1996 Richmond Highway Estimated Current Retail Sales
Televisions, VCR's, Sound Equipment	$174	$7,084,729	0%	$0
Video Tapes, CD's, Tapes, Etc.	$67	$2,738,190	0%	$0
Computer Equipment	$28	$1,159,594	0%	$0
Other Household Electronic Equipment	$13	$533,535	0%	$0
ELECTRONICS SUBTOTAL:	**$283**	**$11,516,048**	**0%**	**$0**
Reading Materials	$101	$4,106,877	3%	$123,206
Recreation and Sporting Equipment	$40	$1,625,061	0%	$0
Pet Supplies	$44	$1,796,657	0%	$0
Entertainment	$108	$4,403,602	0%	$0
Tobacco	$113	$4,589,871	3%	$137,696
Flowers and Gardening	$79	$3,224,444	0%	$0
Photographic Supplies and Equipment	$34	$1,371,948	0%	$0
Optical Goods	$29	$1,172,636	0%	$0
Jewelry and Accessories	$97	$3,933,651	0%	$0
Toys and Hobbies (inc. Video Games)	$42	$1,714,731	0%	$0
MISCELLANEOUS SUBTOTAL:	**$685**	**$27,939,479**	**1%**	**$260,902**
OTHER	**$321**	**$13,091,836**	**0%**	$0
SUBTOTAL	**$5,057**	**$206,110,564**	**1%**	**$2,526,491**

demand neighborhood

EXHIBIT A-3
ESTIMATED RETAIL DEMAND POTENTIAL
RICHMOND HIGHWAY-- TOTAL 3 SUBAREAS
NEIGHBORHOOD CENTER

	SALES FROM PMA RESIDENTS			ADD'L SALES FROM NON-PMA RESIDENTS	TOTAL SALES POTENTIAL	SIC CODE DISTRIBUTION %						SIC CODE DISTRIBUTION $					
	SUBAREA A	SUBAREA B	SUBAREA FRAN.			52	53/56	54	57	58	59	52	53/56	54	57	58	59
Men's	$0	$0	$0	$0	$0		100%					$0	$0	$0	$0	$0	$0
Boys'	$0	$0	$0	$0	$0		100%					$0	$0	$0	$0	$0	$0
Women's	$0	$0	$0	$0	$0		100%					$0	$0	$0	$0	$0	$0
Girls'	$0	$0	$0	$0	$0		100%					$0	$0	$0	$0	$0	$0
Infants'	$0	$0	$0	$0	$0		100%					$0	$0	$0	$0	$0	$0
Footwear	$0	$0	$0	$0	$0		100%					$0	$0	$0	$0	$0	$0
Apparel & Footwear Repair	$0	$0	$0	$0	$0		100%					$0	$0	$0	$0	$0	$0
Dry Cleaning and Laundry	$207,338	$174,939	$0	$64,987	$447,264		0%					$0	$0	$0	$0	$0	$0
APPAREL AND RELATED SUBTOTAL:	$207,338	$174,939	$0	$64,987	$447,264		0%										
Food	$7,673,389	$8,525,947	$1,385,680	$2,989,453	$20,574,469		5%	90%			5%	$0	$1,028,723	$18,517,022	$0	$0	$1,028,723
Alcoholic Beverages	$914,267	$815,135	$122,619	$314,844	$2,166,866			50%			50%	$0	$0	$1,083,433	$0	$0	$1,083,433
Food & Alcohol Away From Home	$916,990	$818,750	$307,922	$449,606	$2,493,268					100%		$0	$0	$0	$0	$2,493,268	$0
Household Supplies	$1,234,501	$1,394,500	$225,271	$485,226	$3,339,498	20%	60%	20%				$667,900	$2,003,699	$667,900	$0	$0	$0
FOOD AND GROCERY SUBTOTAL:	$10,739,147	$11,554,333	$2,041,492	$4,239,128 #	$28,574,100												
Drugs and Medical Equipment	$1,003,688	$1,140,126	$184,039	$395,735	$2,723,588		15%	10%			75%	$0	$408,538	$272,359	$0	$0	$2,042,691
Personal Care Services	$0	$0	$0	$0	$0							$0	$0	$0	$0	$0	$0
Cosmetics	$74,875	$43,915	$0	$20,194	$138,985		25%	2%			73%	$0	$34,746	$2,780	$0	$0	$101,459
Toiletries and Other Hygiene	$211,046	$265,380	$40,058	$87,802	$604,286		30%	10%			60%	$0	$181,286	$60,429	$0	$0	$362,572
HEALTH & PERSONAL CARE SUBTOTAL:	$1,289,608	$1,449,421	$224,097	$503,732	$3,466,859												
Furniture	$0	$0	$0	$0	$0				100%			$0	$0	$0	$0	$0	$0
Appliances	$0	$0	$0	$0	$0		100%					$0	$0	$0	$0	$0	$0
Carpeting and Window Coverings	$0	$0	$0	$0	$0	10%	5%		85%			$0	$0	$0	$0	$0	$0
Other Home Furnishings	$0	$0	$0	$0	$0		90%		10%			$0	$0	$0	$0	$0	$0
HOME FURNISHING SUBTOTAL:	$0	$0	$0	$0	$0												

EXHIBIT A-3
ESTIMATED RETAIL DEMAND POTENTIAL
RICHMOND HIGHWAY-- TOTAL 3 SUBAREAS
NEIGHBORHOOD CENTER

	SALES FROM PMA RESIDENTS			ADD'L SALES FROM NON-PMA RESIDENTS	TOTAL SALES POTENTIAL	SIC CODE DISTRIBUTION %						SIC CODE DISTRIBUTION $					
	SUBAREA A	SUBAREA B	SUBAREA FRAN.			52	53/56	54	57	58	59	52	53/56	54	57	58	59
Televisions, VCR's, Sound Equipment	$0	$0	$0	$0	$0		100%					$0	$0	$0	$0	$0	$0
Video Tapes, CD's, Tapes, Etc.	$0	$0	$0	$0	$0		100%					$0	$0	$0	$0	$0	$0
Computer Equipment	$0	$0	$0	$0	$0						100%	$0	$0	$0	$0	$0	$0
Other Household Electronic Equipment	$0	$0	$0	$0	$0		95%				5%	$0	$0	$0	$0	$0	$0
ELECTRONICS SUBTOTAL:	$0	$0	$0	$0	$0												
Reading Materials	$179,984	$109,104	$123,206	$70,090	$482,385		80%	20%				$0	$385,908	$96,477	$0	$0	$0
Recreation and Sporting Equipment	$0	$0	$0	$0	$0		100%					$0	$0	$0	$0	$0	$0
Pet Supplies	$100,587	$72,923	$0	$29,497	$203,006		10%	40%			50%	$0	$20,301	$81,203	$0	$0	$101,503
Entertainment	$0	$0	$0	$0	$0							$0	$0	$0	$0	$0	$0
Tobacco	$758,767	$855,892	$137,696	$297,900	$2,050,256		10%	50%			40%	$0	$205,026	$1,025,128	$0	$0	$820,102
Flowers and Gardening	$181,650	$88,862	$0	$45,987	$316,499	60%	30%	10%				$189,899	$94,950	$31,650	$0	$0	$0
Photographic Supplies and Equipment	$58,536	$73,069	$0	$22,373	$153,978		80%	10%			10%	$0	$123,182	$15,398	$0	$0	$15,398
Optical Goods	$0	$0	$0	$0	$0						100%	$0	$0	$0	$0	$0	$0
Jewelry and Accessories	$0	$0	$0	$0	$0		90%				10%	$0	$0	$0	$0	$0	$0
Toys and Hobbies (inc. Video Games)	$0	$0	$0	$0	$0		90%				10%	$0	$0	$0	$0	$0	$0
MISCELLANEOUS SUBTOTAL:	$1,279,524	$1,199,850	$260,902	$465,847	$3,206,124												
OTHER	$193,497	$86,868	$0	$47,662	$328,027	85%					15%	$278,823					$49,204
SUBTOTAL	$13,515,618	$14,378,543	$2,526,491	$5,273,694	$36,022,374							$1,136,622	$4,486,359	$21,853,776	$0	$2,493,268	$5,605,085

SOURCE: Claritas; Robert Charles Lesser & Co.

EXHIBIT A-4
ESTIMATED RETAIL DEMAND POTENTIAL
RICHMOND HIGHWAY -- SUBAREA A
UPGRADE AND POWER CENTER

	Subarea Potential Expenditures Per Capita	1996 Total Retail Expenditures	1996 Richmond Highway Estimated Current Capture Rate	1996 Richmond Highway Estimated Current Retail Sales
Men's	$138	$8,411,428	27%	$2,271,086
Boys'	$31	$1,892,237	40%	$756,895
Women's	$234	$14,250,435	33%	$4,702,644
Girls'	$39	$2,363,321	40%	$945,328
Infants'	$29	$1,754,863	42%	$737,042
Footwear	$152	$9,225,339	35%	$3,228,869
Apparel & Footwear Repair	$6	$364,710	80%	$291,768
Dry Cleaning and Laundry	$68	$4,146,753	90%	$3,732,077
APPAREL AND RELATED SUBTOTAL:	**$698**	**$42,409,087**	**39%**	**$16,665,709**
Food	$1,148	$69,758,082	95%	$66,270,178
Alcoholic Beverages	$150	$9,142,672	85%	$7,771,271
Food & Alcohol Away From Home	$754	$45,849,518	78%	$35,762,624
Household Supplies	$185	$11,222,735	95%	$10,661,598
FOOD AND GROCERY SUBTOTAL:	**$2,237**	**$135,973,006**	**89%**	**$120,465,670**
Drugs and Medical Equipment	$150	$9,124,436	95%	$8,668,215
Personal Care Services	$88	$5,322,942	60%	$3,193,765
Cosmetics	$41	$2,495,832	65%	$1,622,291
Toiletries and Other Hygiene	$50	$3,014,936	95%	$2,864,189
HEALTH & PERSONAL CARE SUBTOTAL:	**$328**	**$19,958,147**	**82%**	**$16,348,460**
Furniture	$184	$11,181,401	52%	$5,814,328
Appliances	$112	$6,824,332	26%	$1,774,326
Carpeting and Window Coverings	$62	$3,743,140	85%	$3,181,669
Other Home Furnishings	$136	$8,289,250	70%	$5,802,475
HOME FURNISHING SUBTOTAL:	**$494**	**$30,038,123**	**55%**	**$16,572,799**

EXHIBIT A-4
ESTIMATED RETAIL DEMAND POTENTIAL
RICHMOND HIGHWAY -- SUBAREA A
UPGRADE AND POWER CENTER

	Subarea Potential Expenditures Per Capita	1996 Total Retail Expenditures	1996 Richmond Highway Estimated Current Capture Rate	1996 Richmond Highway Estimated Current Retail Sales
Televisions, VCR's, Sound Equipment	$172	$10,465,961	26%	$2,721,150
Video Tapes, CD's, Tapes, Etc.	$66	$4,009,986	46%	$1,844,594
Computer Equipment	$27	$1,643,626	16%	$262,980
Other Household Electronic Equipment	$13	$784,127	66%	$517,523
ELECTRONICS SUBTOTAL:	**$278**	**$16,903,701**	**32%**	**$5,346,247**
Reading Materials	$99	$5,999,480	60%	$3,599,688
Recreation and Sporting Equipment	$38	$2,280,045	60%	$1,368,027
Pet Supplies	$41	$2,514,675	76%	$1,911,153
Entertainment	$102	$6,208,580	20%	$1,241,716
Tobacco	$113	$6,897,882	95%	$6,552,988
Flowers and Gardening	$75	$4,541,247	80%	$3,632,998
Photographic Supplies and Equipment	$32	$1,951,199	90%	$1,756,079
Optical Goods	$28	$1,671,588	10%	$167,159
Jewelry and Accessories	$94	$5,695,555	36%	$2,050,400
Toys and Hobbies (inc. Video Games)	$41	$2,484,283	46%	$1,142,770
MISCELLANEOUS SUBTOTAL:	**$662**	**$40,244,533**	**58%**	**$23,422,977**
OTHER	**$318**	**$19,349,716**	**85%**	**$16,447,259**
SUBTOTAL	**$5,016**	**$304,876,312**	**71%**	**$215,269,122**

EXHIBIT A-4
ESTIMATED RETAIL DEMAND POTENTIAL
RICHMOND HIGHWAY -- SUBAREA B
UPGRADE AND POWER CENTER

	Subarea Potential Expenditures Per Capita	1996 Total Retail Expenditures	1996 Richmond Highway Estimated Current Capture Rate	1996 Richmond Highway Estimated Current Retail Sales
Men's	$143	$3,893,601	16%	$622,976
Boys'	$31	$830,060	22%	$182,613
Women's	$241	$6,542,249	14%	$915,915
Girls'	$39	$1,049,310	22%	$230,848
Infants'	$27	$745,127	28%	$208,636
Footwear	$153	$4,149,756	17%	$705,458
Apparel & Footwear Repair	$6	$172,036	27%	$46,450
Dry Cleaning and Laundry	$64	$1,749,393	27%	$472,336
APPAREL AND RELATED SUBTOTAL:	**$705**	**$19,131,532**	**18%**	**$3,385,232**
Food	$1,122	$30,449,812	83%	$25,273,344
Alcoholic Beverages	$150	$4,075,677	68%	$2,771,460
Food & Alcohol Away From Home	$754	$20,468,745	50%	$10,234,372
Household Supplies	$184	$4,980,358	83%	$4,133,697
FOOD AND GROCERY SUBTOTAL:	**$2,210**	**$59,974,591**	**71%**	**$42,412,873**
Drugs and Medical Equipment	$150	$4,071,878	83%	$3,379,659
Personal Care Services	$88	$2,396,563	10%	$239,656
Cosmetics	$40	$1,097,882	30%	$329,365
Toiletries and Other Hygiene	$49	$1,326,902	83%	$1,101,328
HEALTH & PERSONAL CARE SUBTOTAL:	**$328**	**$8,893,225**	**57%**	**$5,050,008**
Furniture	$190	$5,155,107	24%	$1,237,226
Appliances	$116	$3,153,630	12%	$378,436
Carpeting and Window Coverings	$68	$1,835,140	50%	$917,570
Other Home Furnishings	$143	$3,891,973	55%	$2,140,585
HOME FURNISHING SUBTOTAL:	**$517**	**$14,035,850**	**33%**	**$4,673,817**

EXHIBIT A-4
ESTIMATED RETAIL DEMAND POTENTIAL
RICHMOND HIGHWAY -- SUBAREA B
UPGRADE AND POWER CENTER

	Subarea Potential Expenditures Per Capita	1996 Total Retail Expenditures	1996 Richmond Highway Estimated Current Capture Rate	Retail Sales
Televisions, VCR's, Sound Equipment	$172	$4,665,863	12%	$559,904
Video Tapes, CD's, Tapes, Etc.	$67	$1,805,563	20%	$361,113
Computer Equipment	$28	$766,021	6%	$45,961
Other Household Electronic Equipment	$13	$354,112	34%	$120,398
ELECTRONICS SUBTOTAL:	**$280**	**$7,591,559**	**14%**	**$1,087,375**
Reading Materials	$101	$2,727,610	50%	$1,363,805
Recreation and Sporting Equipment	$40	$1,076,717	35%	$376,851
Pet Supplies	$45	$1,215,377	40%	$486,151
Entertainment	$109	$2,947,946	7%	$206,356
Tobacco	$113	$3,056,758	83%	$2,537,109
Flowers and Gardening	$82	$2,221,542	66%	$1,466,218
Photographic Supplies and Equipment	$34	$913,364	55%	$502,350
Optical Goods	$29	$793,970	5%	$39,699
Jewelry and Accessories	$96	$2,603,603	16%	$416,577
Toys and Hobbies (inc. Video Games)	$42	$1,135,328	30%	$340,599
MISCELLANEOUS SUBTOTAL:	**$689**	**$18,692,216**	**41%**	**$7,735,714**
OTHER	**$320**	**$8,686,787**	**50%**	**$4,343,394**
SUBTOTAL	**$5,049**	**$137,005,760**	**50%**	**$68,688,413**

EXHIBIT A-4
ESTIMATED RETAIL DEMAND POTENTIAL
RICHMOND HIGHWAY-- SUBAREA FRANCONIA
UPGRADE AND POWER CENTER

	Subarea Potential Expenditures Per Capita	1996 Total Retail Expenditures	1996 Richmond Highway Estimated Current Capture Rate	1996 Richmond Highway Estimated Current Retail Sales
Men's	$143	$5,830,575	4%	$233,223
Boys'	$31	$1,270,458	8%	$101,637
Women's	$238	$9,712,462	4%	$388,498
Girls'	$39	$1,606,720	8%	$128,538
Infants'	$26	$1,072,369	8%	$85,790
Footwear	$153	$6,230,013	10%	$623,001
Apparel & Footwear Repair	$6	$253,929	3%	$7,618
Dry Cleaning and Laundry	$65	$2,657,894	3%	$79,737
APPAREL AND RELATED SUBTOTAL:	**$703**	**$28,634,420**	**6%**	**$1,648,041**
Food	$1,133	$46,189,322	33%	$15,242,476
Alcoholic Beverages	$150	$6,130,969	28%	$1,716,671
Food & Alcohol Away From Home	$755	$30,792,202	18%	$5,542,596
Household Supplies	$184	$7,509,031	33%	$2,477,980
FOOD AND GROCERY SUBTOTAL:	**$2,223**	**$90,621,523**	**28%**	**$24,979,724**
Drugs and Medical Equipment	$151	$6,134,637	33%	$2,024,430
Personal Care Services	$87	$3,561,114	3%	$106,833
Cosmetics	$41	$1,659,706	11%	$182,568
Toiletries and Other Hygiene	$49	$2,002,897	33%	$660,956
HEALTH & PERSONAL CARE SUBTOTAL:	**$328**	**$13,358,355**	**22%**	**$2,974,787**
Furniture	$190	$7,744,210	3%	$232,326
Appliances	$115	$4,701,958	2%	$94,039
Carpeting and Window Coverings	$66	$2,704,767	3%	$81,143
Other Home Furnishings	$142	$5,797,968	25%	$1,449,492
HOME FURNISHING SUBTOTAL:	**$514**	**$20,948,903**	**9%**	**$1,857,000**

EXHIBIT A-4
ESTIMATED RETAIL DEMAND POTENTIAL
RICHMOND HIGHWAY-- SUBAREA FRANCONIA
UPGRADE AND POWER CENTER

	Subarea Potential Expenditures Per Capita	1996 Total Retail Expenditures	1996 Richmond Highway Estimated Current Capture Rate	1996 Richmond Highway Estimated Current Retail Sales
Televisions, VCR's, Sound Equipment	$174	$7,084,729	2%	$141,695
Video Tapes, CD's, Tapes, Etc.	$67	$2,738,190	2%	$54,764
Computer Equipment	$28	$1,159,594	2%	$23,192
Other Household Electronic Equipment	$13	$533,535	7%	$37,347
ELECTRONICS SUBTOTAL:	**$283**	**$11,516,048**	**2%**	**$256,998**
Reading Materials	$101	$4,106,877	18%	$739,238
Recreation and Sporting Equipment	$40	$1,625,061	16%	$260,010
Pet Supplies	$44	$1,796,657	5%	$89,833
Entertainment	$108	$4,403,602	1%	$44,036
Tobacco	$113	$4,589,871	33%	$1,514,657
Flowers and Gardening	$79	$3,224,444	6%	$193,467
Photographic Supplies and Equipment	$34	$1,371,948	14%	$192,073
Optical Goods	$29	$1,172,636	2%	$23,453
Jewelry and Accessories	$97	$3,933,651	5%	$196,683
Toys and Hobbies (inc. Video Games)	$42	$1,714,731	8%	$137,178
MISCELLANEOUS SUBTOTAL:	**$685**	**$27,939,479**	**12%**	**$3,390,627**
OTHER	**$321**	**$13,091,836**	**5%**	$654,592
SUBTOTAL	**$5,057**	**$206,110,564**	**17%**	**$35,761,770**

demand upgrade & power

EXHIBIT A-4
ESTIMATED RETAIL DEMAND POTENTIAL
RICHMOND HIGHWAY-- TOTAL 3 SUBAREAS
UPGRADE AND POWER CENTER

	SALES FROM PMA RESIDENTS			ADD'L SALES FROM NON-PMA	TOTAL SALES	SIC CODE DISTRIBTUION %						SIC CODE DISTRIBTUION $					
	SUBAREA A	SUBAREA B	SUBAREA FRAN.	RESIDENTS	POTENTIAL	52	53/56	54	57	58	59	52	53/56	54	57	58	59
Men's	$2,271,086	$622,976	$233,223	$531,638	$3,658,923		100%					$0	$3,658,923	$0	$0	$0	$0
Boys'	$756,895	$182,613	$101,637	$176,995	$1,218,139		100%					$0	$1,218,139	$0	$0	$0	$0
Women's	$4,702,644	$915,915	$388,498	$1,021,200	$7,028,257		100%					$0	$7,028,257	$0	$0	$0	$0
Girls'	$945,328	$230,848	$128,538	$221,801	$1,526,516		100%					$0	$1,526,516	$0	$0	$0	$0
Infants'	$737,042	$208,636	$85,790	$175,349	$1,206,817		100%					$0	$1,206,817	$0	$0	$0	$0
Footwear	$3,228,869	$705,458	$623,001	$774,746	$5,332,074		100%					$0	$5,332,074	$0	$0	$0	$0
Apparel & Footwear Repair	$291,768	$46,450	$7,618	$58,792	$404,628		0%					$0	$0	$0	$0	$0	$0
Dry Cleaning and Laundry	$3,732,077	$472,336	$79,737	$728,306	$5,012,456		0%					$0	$0	$0	$0	$0	$0
APPAREL AND RELATED SUBTOTAL:	$16,665,709	$3,385,232	$1,648,041	$3,688,827	$25,387,810												
Food	$66,270,178	$25,273,344	$15,242,476	$18,153,620	$124,939,617		5%	90%			5%	$0	$6,246,981	$112,445,655	$0	$0	$6,246,981
Alcoholic Beverages	$7,771,271	$2,771,460	$1,716,671	$2,084,098	$14,343,501			50%			50%	$0	$0	$7,171,751	$0	$0	$7,171,751
Food & Alcohol Away From Home	$35,762,624	$10,234,372	$5,542,596	$11,338,710	$62,878,303					100%		$0	$0	$0	$0	$62,878,303	$0
Household Supplies	$10,661,598	$4,133,697	$2,477,980	$2,936,457	$20,209,732	20%	60%	20%				$4,041,946	$12,125,839	$4,041,946	$0	$0	$0
FOOD AND GROCERY SUBTOTAL:	$120,465,670	$42,412,873	$24,979,724	$34,512,885 #	$222,371,152												
Drugs and Medical Equipment	$8,668,215	$3,379,659	$2,024,430	$2,392,292	$16,464,595		15%	10%			75%	$0	$2,469,689	$1,646,460	$0	$0	$12,348,446
Personal Care Services	$3,193,765	$239,656	$106,833	$601,843	$4,142,099							$0	$0	$0	$0	$0	$0
Cosmetics	$1,622,291	$329,365	$182,568	$362,818	$2,497,041		25%	2%			73%	$0	$624,260	$49,941	$0	$0	$1,822,840
Toiletries and Other Hygiene	$2,864,189	$1,101,328	$660,956	$786,501	$5,412,974		30%	10%			60%	$0	$1,623,892	$541,297	$0	$0	$3,247,784
HEALTH & PERSONAL CARE SUBTOTAL:	$16,348,460	$5,050,008	$2,974,787	$4,143,453	$28,516,709												
Furniture	$5,814,328	$1,237,226	$232,326	$1,238,260	$8,522,140				100%			$0	$0	$0	$8,522,140	$0	$0
Appliances	$1,774,326	$378,436	$94,039	$381,956	$2,628,757		100%					$0	$2,628,757	$0	$0	$0	$0
Carpeting and Window Coverings	$3,181,669	$917,570	$81,143	$710,665	$4,891,047	10%	5%		85%			$489,105	$244,552	$0	$4,157,390	$0	$0
Other Home Furnishings	$5,802,475	$2,140,585	$1,449,492	$1,596,734	$10,989,286		90%		10%			$0	$9,890,358	$0	$1,098,929	$0	$0
HOME FURNISHING SUBTOTAL:	$16,572,799	$4,673,817	$1,857,000	$3,927,615	$27,031,231												

demand upgrade & power

EXHIBIT A-4
ESTIMATED RETAIL DEMAND POTENTIAL
RICHMOND HIGHWAY-- TOTAL 3 SUBAREAS
UPGRADE AND POWER CENTER

	SALES FROM PMA RESIDENTS			ADD'L SALES FROM NON-PMA RESIDENTS	TOTAL SALES POTENTIAL	SIC CODE DISTRIBTUION %						SIC CODE DISTRIBTUION $					
	SUBAREA A	SUBAREA B	SUBAREA FRAN.			52	53/56	54	57	58	59	52	53/56	54	57	58	59
Televisions, VCR's, Sound Equipment	$2,721,150	$559,904	$141,695	$581,867	$4,004,615		100%					$0	$4,004,615	$0	$0	$0	$0
Video Tapes, CD's, Tapes, Etc.	$1,844,594	$361,113	$54,764	$384,280	$2,644,750		100%					$0	$2,644,750	$0	$0	$0	$0
Computer Equipment	$262,980	$45,961	$23,192	$56,463	$388,596						100%	$0	$0	$0	$0	$0	$388,596
Other Household Electronic Equipment	$517,523	$120,398	$37,347	$114,796	$790,065		95%				5%	$0	$750,561	$0	$0	$0	$39,503
ELECTRONICS SUBTOTAL:	$5,346,247	$1,087,375	$256,998	$1,137,405	$7,828,026												
Reading Materials	$3,599,688	$1,363,805	$739,238	$969,464	$6,672,195		80%	20%				$0	$5,337,756	$1,334,439	$0	$0	$0
Recreation and Sporting Equipment	$1,368,027	$376,851	$260,010	$340,831	$2,345,719		100%					$0	$2,345,719	$0	$0	$0	$0
Pet Supplies	$1,911,153	$486,151	$89,833	$422,813	$2,909,950		10%	40%			50%	$0	$290,995	$1,163,980	$0	$0	$1,454,975
Entertainment	$1,241,716	$206,356	$44,036	$253,658	$1,745,767							$0	$0	$0	$0	$0	$0
Tobacco	$6,552,988	$2,537,109	$1,514,657	$1,802,808	$12,407,562		10%	50%			40%	$0	$1,240,756	$6,203,781	$0	$0	$4,963,025
Flowers and Gardening	$3,632,998	$1,466,218	$193,467	$899,756	$6,192,439	60%	30%	10%				$3,715,463	$1,857,732	$619,244	$0	$0	$0
Photographic Supplies and Equipment	$1,756,079	$502,350	$192,073	$416,585	$2,867,087		80%	10%			10%	$0	$2,293,670	$286,709	$0	$0	$286,709
Optical Goods	$167,159	$39,699	$23,453	$39,153	$269,463						100%	$0	$0	$0	$0	$0	$269,463
Jewelry and Accessories	$2,050,400	$416,577	$196,683	$452,822	$3,116,481		90%				10%	$0	$2,804,833	$0	$0	$0	$311,648
Toys and Hobbies (inc. Video Games)	$1,142,770	$340,599	$137,178	$275,493	$1,896,040		90%				10%	$0	$1,706,436	$0	$0	$0	$189,604
MISCELLANEOUS SUBTOTAL:	$23,422,977	$7,735,714	$3,390,627	$5,873,384	$40,422,702												
OTHER	$16,447,259	$4,343,394	$654,592	$3,645,691	$25,090,935	85%					15%	$21,327,295					$3,763,640
SUBTOTAL	$198,821,863	$64,345,019	$35,107,178	$53,283,570	$376,648,565							$29,573,809	$81,102,878	$135,505,203	$13,778,459	$62,878,303	$42,504,965

SOURCE: Claritas; Robert Charles Lesser & Co.

EXHIBIT A-5
SURVEY OF SELECTED OFFICE DEVELOPMENTS
RICHMOND HIGHWAY CORRIDOR

CENTER/ LOCATION/ OWNER/	YEAR BUILT	NUMBER FLOORS	NRA (SF)	AVAILABLE (SF)	VACANCY RATE (%)	IN-LINE LEASE RATE ($/SF FS)
MT. ZEPHYR BUSINESS CENTER 8301-8305 Richmond Highway ERA Genini	1989	2	37,000	3,000	8.1%	CONDO RESALES $80.00 - $90.00 $10.00 $11.00 plus utilities
HUNTWOOD PLAZA 5845 Richmond Highway Carey Winston	1986	8	93,670	7,500	8.0%	$19.00
ONE BELTWAY CENTER 5904 Richmond Highway	1986	5	76,599	0	0.0%	(no space avail; older leases at $12.00/sf)
JEMAL BUILDING 6910 Richmond Highway Jemal	1990	5	88,000	0	0.0%	$15.00 - $18.00
METROCALL BUILDING 6911 Richmond Highway	1972	4	27,000	0	0.0%	$15.00
IMP BUILDING 8850 Richmond Highway	1988	3	66,000	0	0.0%	NA

SOURCE: Spaulding & Slye; Robert Charles Lesser & Co.

EXHIBIT A-6
SURVEY OF SELECTED OFFICE DEVELOPMENTS
EISENHOWER VALLEY

CENTER/ LOCATION/	YEAR BUILT	NUMBER FLOORS	NRA (SF)	AVAILABLE (SF)	VACANCY RATE (%)	IN-LINE LEASE RATE ($/SF FS)
EISENHOWER CENTER II 2111 Eisenhower Avenue	1984	5	34,900	1,750	5.0%	$16.50 - $17.50
EISENHOWER CENTER I 2121 Eisenhower Avenue	1981	6	53,976	0	0.0%	NA
ALEXANDRIA TECH CENTER I 2730 Eisenhower Avenue	1987	1	22,000	0	0.0%	NA
ALEXANDRIA TECH CENTER II 2760 Eisenhower Avenue	1985	4	46,200	5,120	11.1%	$16.00 - $17.50
ALEXANDRIA TECH CENTER IV 2850 Eisenhower Avenue	1992	6	72,000	0	0.0%	NA
ALEXANDRIA TECH CENTER III 2900 Eisenhower Avenue	1987	4	58,000	0	0.0%	NA
CAMERON RUN OFFICE PARK PH I 3601 Eisenhower Avenue	1990	6	150,000	12,376	8.3%	$19.00
BOGLE BUSINESS CENTER 4601 Eisenhower Avenue	1985	1	65,000	26,766	41.2%	$6.30 - $11.00
EISENHOWER EXECUTIVE 4875 Eisenhower Avenue	1985	2	49,000	0	0.0%	NA
BUSH HILL OFFICE BUILDING 5001 Eisenhower Avenue	1973	13	549,336	0	0.0%	NA
ALEXANDRIA COMMERCIAL CENTER 5200 Eisenhower Avenue	1976	1	63,290	6,594	10.4%	$5.75 - $9.50
5000 EISENHOWER AVENUE PH I&II	(P)	4	98,600	NA	NA	NA

SOURCE: Spaulding & Slye; Robert Charles Lesser & Co.

EXHIBIT A-7
SURVEY OF SELECTEDTOWNHOUSE AND CONDOMINIUM PROJECTS
RICHMOND HIGHWAY CORRIDOR

PROJECT	TYPE	SALES BEGAN	UNITS PLANNED	UNITS SOLD	MO. ABS	UNIT TYPE	UNIT SIZE	BASE PRICE	VALUE RATIO ($/S.F.)	COMMENTS
RYAN HOMES AT SOUTH MEADOWS	Condo	1994	276	143	3.7	2B/2b	1,100 - 1,244	$99,999 - $124,999	$91 - $100	Buyers work in Alexandria, Pentagon, DC. Typically, young professionals from Alexandria. Only 10% get added security option.
RICHMOND AMERICAN AT MT. VERNON TOWNS	TH	Jun-95	49	13	0.7	2B/Rec/2.5b 3B/2.5b	1,320	$129,990	$98	Lot size 16'x80'. End units 26'x80' End unit premium $4,000 Avg. Upgrades $5,000 Buyers are in their forties, some single mothers. Price was originally $139,990. Dropped 8 months ago, since then sold 11 units. Residents work in Ft. Belvoir. Typical income $35-$40,000. Lots of VA deals ($0 down)
RYAN HOMES AT HUNTINGTON COMMONS	TH	Feb-95	34	34	1.5	3B/2.5b	1,210 - 1,366	$149,990 - $159,990	$124 - $117	Units sold out in Dec-96. Located off Telegraph Rd 3/10 mile south of beltway. Lot sizes 20x30/32, 20x34/36 Minimum income $42,000 with no debt. Avg income - $60,700.

SOURCE: Robert Charles Lesser and Co.

EXHIBIT A -8
SURVEY OF RENTAL PROJECTS
RICHMOND HIGHWAY CORRIDOR

PROJECT/ LOCATION/ BUILDER/ MANAGEMENT COMPANY	TYPE	YEAR BEGAN RENTING	PLANNED OFFERED OCCUPIED	OCC. RATE	N° OF STO-RIES	UNIT MIX	UNIT TYPE	UNIT SIZE	BASE RENT	VALUE RATIO ($/S.F.)	AMENITIES/ PARKING	COMMENTS
HUNTINGTON GATEWAY	HR	1990	417	97.6%	9	11%	1B/1b	600	$750	$1.25	Recreation room, tennis courts, indoor and outdoor pool, jacuzzi, sauna, exercise room, steam room, racquetball and basketball courts. Underground parking.	Currently offering one month free rent on all vacant units. Majority of renters are professionals working in the District. The project offers a complimentary shuttle to the Huntington metro station.
5982 Richmond Highway &			417		13	41%	1B/1b	934	$935	$1.00		
Huntington Avenue			407			11%	1B/D/1.5b	988	$940	$0.95		
Hardaway Construction						37%	2B/2b	1,180	$1,205	$1.02		
Huntington Gateway												
						Weighted Average:		994	$1,015	$1.02		
	TH		26	100.0%	3	50%	2B/2.5b	1,450	$1,250	$0.86		
			26			50%	2B/2.5b	1,450	$1,300	$0.90		
			26									
						Weighted Average:		1,450	$1,275	$0.88		
BELLE HAVEN TOWERS	HR	1966	568	94.0%	10	5%	Efficiency	366	$568	$1.55	Recreation room, outdoor grills, tot lot, volleyball court, tennis courts, aerobics room. Open parking.	Currently offering $65 off first month's rent on all vacant efficiencies and one-bedroom units. Offering $25 off on two- and three-bedroom units. Wide array of tenants with a majority of professionals working in the District, Arlington, and Alexandria. Approximately 8 to 10 percent of the tenants are military, which has dropped off significantly due to development closer to Fort Belvoir.
6034 Richmond Highway &		(3 bldgs.)	568		9	5%	Efficiency	430	$606	$1.41		
Capital Beltway		1973	534		8	12%	1B/1b	540	$660	$1.22		
Grady Management		(1 bldg.)			8	12%	1B/1b	655	$628	$0.96		
						12%	1B/1b	754	$662	$0.88		
						11%	1B/1b	760	$696	$0.92		
						11%	1B/1b	790	$738	$0.93		
						8%	2B/1b	845	$780	$0.92		
						8%	2B/1.5b	894	$803	$0.90		
						8%	2B/1.5b	960	$830	$0.86		
						4%	3B/2b	1,168	$868	$0.74		
						4%	3B/1.5b	1,168	$832	$0.71		
						Weighted Average:		752	$710	$0.94		

EXHIBIT A -8
SURVEY OF RENTAL PROJECTS
RICHMOND HIGHWAY CORRIDOR

PROJECT/ LOCATION/ BUILDER/ MANAGEMENT COMPANY	TYPE	YEAR BEGAN RENTING	PLANNED OFFERED OCCUPIED	OCC. RATE	N° OF STO-RIES	UNIT MIX	UNIT TYPE	UNIT SIZE	BASE RENT	VALUE RATIO ($/S.F.)	AMENITIES/ PARKING	COMMENTS
RIVERSIDE PARK	HR	1967	1,222	93.8%	16	6%	Studio	300	$575	$1.92	Pool, tennis courts, fitness centers, volleyball, saunas, jacuzzi. Open parking.	Offering $100 off rent for 12 months with one-year lease. Variety of tenants with almost 30 percent military. Other tenants typically work in the District.
Huntington Avenue &			1,222			6%	Studio	500	$610	$1.22		
Route 1			1,146			6%	Studio	550	$625	$1.14		
Winthrop Management						61%	1B/1b	800	$725	$0.91		
						21%	2B/2b	1,132	$895	$0.79		
						Weighted Average:		805	$737	$0.92		
WOODLAWN GABLE	Garden	1989	248	95.6%	3	23%	1B/1b	693	$720	$1.04	Recreation room, pool, exercise room, racquetball court, volleyball court. Open parking.	Offering $300 off first two months rent on one-bedroom with loft units and $400 off first month rent on two-bedroom with loft units. Some military tenants, mostly young singles and couples, with a few families. $2[illegible] premium for fireplaces.
Woodlawn Gable Drive &			248			10%	1B/L/1b	864	$835	$0.97		
Meers Road			237			17%	2B/1.5b	858	$795	$0.93		
The Gables Management Group						17%	2B/2b	1,004	$850	$0.85		
						18%	2B/SR/2b	1,076	$895	$0.83		
						8%	2B/L/3b	1,280	$1,025	$0.80		
						8%	2B/L/SR/3b	1,352	$1,065	$0.79		
						Weighted Average:		961	$851	$0.89		
WOODSIDE APARTMENTS	Garden	1988	252	99.6%	3	17%	1B/1b	714	$725	$1.02	Recreation room, pool, exercise room, and tot lot. Open parking, tenants must have decal.	Offering $60 off rent on the one remaining unit. The project is located four miles south of Fort Belvoir. Approximately 50 percent of the tenants are military. The balance is composed of people working in Arlington, Alexandria, and some in the District.
7525 Woodside Lane &			252			17%	1B/1b	922	$775	$0.84		
Route 1			251			8%	2B/1.25b	912	$810	$0.89		
Artery Management Company						24%	2B/2b	1,055	$865	$0.82		
						24%	2B/2b	999	$870	$0.87		
						10%	3B/2b	1,196	$915	$0.77		
						Weighted Average:		966	$830	$0.86		

EXHIBIT A -8
SURVEY OF RENTAL PROJECTS
RICHMOND HIGHWAY CORRIDOR

PROJECT/ LOCATION/ BUILDER/ MANAGEMENT COMPANY	TYPE	YEAR BEGAN RENTING	PLANNED OFFERED OCCUPIED	OCC. RATE	N° OF STO-RIES	UNIT MIX	UNIT TYPE	UNIT SIZE	BASE RENT	VALUE RATIO ($/S.F.)	AMENITIES/ PARKING	COMMENTS
OAKS OF WOODLAWN	Garden	1985	175	100.0%	3	43%	1B/1b	787	$690	$0.88	Recreation room, tennis	No concessions. Mostly working singles an
8799 Old Colony Way &		1986	175		4	57%	2B/2b	1,035	$770	$0.74	courts, pool, jacuzzi, gym.	couples with approximately 40 percent
Old Mill Road			175								Open parking.	military.
Amurcon Realty						Weighted Average:		929	$736	$0.79		
MOUNT VERNON SQUARE	Garden	1966	1,387	95.0%	3	22%	1B/1b	689	$580	$0.84	Recreation room, tennis	Currently offering $25 off rent and one-half
7429 Vernon Square Drive &			1,387			22%	1B/1b	750	$610	$0.81	courts, pool, sauna, fitness	month free rent on two-bedrooms, and one
Richmond Highway			1,318			40%	2B/1b	897	$700	$0.78	center. Open parking.	month on one-bedrooms. Variety of
Van Metre						16%	3B/2b	1,171	$835	$0.71		tenants including 30 percent military, 15
						Weighted Average:		857	$671	$0.78		percent families, and working singles and couples.
CHERRY ARMS	Garden	1965	168	98.2%	3	38%	1B/1b	670	$590	$0.88	Pool, basketball courts,	No security deposit required to move in on
Richmond Highway &			168		5	46%	2B/2b	933	$700	$0.75	quarter-mile track. Open	available units. Wide mix of tenants includi
Luna Street			165			8%	2B/D/2b	968	$735	$0.76	parking.	military and professionals.
Southern Management						6%	3B/2b	890	$775	$0.87		
						2%	3B/D/2b	1,006	$805	$0.80		
						Weighted Average:		831	$665	$0.80		
WASHINGTON SQUARE APARTMENTS	Garden	1963	219	95.9%	3	39%	1B/1b	737	$610	$0.83	Pool. Open space	Offering $80 off two-bedroom units. $25
8547 Richmond Highway &			219			56%	2B/2b	858	$715	$0.83	parking.	additional for fully carpeted units. Located
Forest Place			210			5%	3B/2b	1,087	$815	$0.75		two miles from Fort Belvoir, 85% of tenants
Aaron Tevaris						Weighted Average:		822	$679	$0.83		are military.
Margate Management												

SOURCE: Robert Charles Lesser & Co.

Claritas Inc.
Sales (800)234-5973 Support (800)234-5629
Area 1 = Richmond Hwy A and B
Area 2 = Franconia

Attribute		Area 1		Area 2	
Population:	2001 Total	89194		47593	
	1996 Total	86940		42730	
	1990 Total	85533		36287	
	1980 Total	80820		25376	
	% Change 90-96	1.6		17.8	
	% Change 80-90	5.8		43.0	
Households:	2001 Total	36568		18563	
	1996 Total	35394		16433	
	1990 Total	34374		13501	
	1980 Total	30181		8046	
	% Change 90-96	3.0		21.7	
	% Change 80-90	13.9		67.8	
Av. HH Size:	2001	2.43		2.55	
	1996	2.44		2.59	
	1990	2.47		2.66	
1996 Group Quarters Population		515		221	
Families:	2001 Total	23630		12645	
	1996 Total	23206		11438	
	1990 Total	22981		9737	
	% Change 90-96	1.0		17.5	
Housing Units:	2001 Total	38517		19731	
	1996 Total	37306		17473	
	1990 Total	36208		14332	
1996 Population by Race/Hispanic		86940	%	42730	%
White (not Hispanic)		57268	65.9	31315	73.3
Black (not Hispanic)		16294	18.7	4503	10.5
Asian (not Hispanic)		5620	6.5	3646	8.5
All Other (not Hispanic)		309	0.4	151	0.4
Hispanic Origin		7449	8.6	3115	7.3
1996 Pop. by Age:		86940	%	42730	%
Under 5 Years		5700	6.6	2883	6.7
5 to 9 Years		5639	6.5	2805	6.6
10 to 14 Years		4888	5.6	2320	5.4
15 to 19 Years		4187	4.8	1930	4.5
20 to 24 Years		5074	5.8	2522	5.9
25 to 29 Years		7674	8.8	4189	9.8
30 to 34 Years		7575	8.7	4450	10.4
35 to 39 Years		8020	9.2	4534	10.6
40 to 44 Years		7903	9.1	4209	9.9
45 to 54 Years		12338	14.2	6061	14.2
55 to 64 Years		7879	9.1	3544	8.3
65 to 74 Years		6470	7.4	2253	5.3
75 to 84 Years		2879	3.3	849	2.0
85 Years and Over		714	0.8	181	0.4
Total Median Age (in Years)		36.7		35.3	
Male Median Age (in Years)		35.9		35.0	

Claritas Inc.
Sales (800)234-5973 Support (800)234-5629
Area 1 = Richmond Hwy A and B
Area 2 = Franconia

Attribute	Area 1		Area 2	
1996 Females by age:(see pp.9-10)	44884	%	21616	%
Under 5 years	2838	6.3	1398	6.5
5 to 9 years	2775	6.2	1355	6.3
10 to 14 years	2384	5.3	1146	5.3
15 to 19 years	2052	4.6	917	4.2
20 to 24 years	2545	5.7	1259	5.8
25 to 29 years	3870	8.6	2165	10.0
30 to 34 years	3936	8.8	2303	10.7
35 to 39 years	4176	9.3	2332	10.8
40 to 44 years	4123	9.2	2116	9.8
45 to 54 years	6264	14.0	2990	13.8
55 to 64 years	4165	9.3	1807	8.4
65 to 74 years	3575	8.0	1220	5.6
75 to 84 years	1666	3.7	473	2.2
85 years and over	515	1.1	135	0.6
Female Median age (in years)	37.4		35.6	
1996 White population by age:	63744	%	34104	%
White under 5 years	3551	5.6	2133	6.3
White 5 to 17 years	8548	13.4	4659	13.7
White 18 to 44 years	26338	41.3	16306	47.8
White 45 to 64 years	16119	25.3	7992	23.4
White 65 years and over	9188	14.4	3014	8.8
1996 Black population by age:	17003	%	4720	%
Black under 5 years	1676	9.9	446	9.4
Black 5 to 17 years	3684	21.7	1005	21.3
Black 18 to 44 years	8419	49.5	2426	51.4
Black 45 to 64 years	2694	15.8	761	16.1
Black 65 years and over	530	3.1	82	1.7
1996 Hispanic population by age:	7449	%	3115	%
Hispanic under 5 years	738	9.9	280	9.0
Hispanic 5 to 17 years	1517	20.4	599	19.2
Hispanic 18 to 44 years	3926	52.7	1668	53.5
Hispanic 45 to 64 years	1013	13.6	480	15.4
Hispanic 65 years and over	255	3.4	88	2.8
Per capita inc.: 1996	$29036		$30332	
1989 (Census)	$23130		$22959	
% Change 89-96	25.5		32.1	
Avg. hhld inc.: 1996	$71219		$78652	
1989 (Census)	$57481		$61394	
% Change 89-96	23.9		28.1	
Med. hhld inc.: 1996	$58688		$69825	
1989 (Census)	$48894		$55897	
% Change 89-96	20.0		24.9	
Med. Family HH inc.: 1996	$68856		$76094	
1989 (Census)	$57671		$61234	
% Change 89-96	19.4		24.3	

Claritas Inc.
Sales (800)234-5973 Support (800)234-5629
Area 1 = Richmond Hwy A and B
Area 2 = Franconia

Attribute	Area 1		Area 2	
1996 Average Household Wealth...	$178602		$182826	
1996 Median Household Wealth....	$80270		$98761	
1996 Households by Hhld Income:.	35394	%	16433	%
(See pg.11) Under $10,000.......	1508	4.3	363	2.2
$ 10,000 to $ 19,999........	1997	5.6	507	3.1
$ 20,000 to $ 24,999........	1429	4.0	473	2.9
$ 25,000 to $ 29,999........	1979	5.6	512	3.1
$ 30,000 to $ 34,999........	1900	5.4	603	3.7
$ 35,000 to $ 49,999........	5690	16.1	1978	12.0
$ 50,000 to $ 74,999........	8880	25.1	4742	28.9
$ 75,000 to $ 99,999........	5471	15.5	3653	22.2
$100,000 to $149,999........	4853	13.7	2898	17.6
$150,000 and Over..........	1687	4.8	704	4.3
1990 Hholds by 1989 hhld income:	34374	%	13501	%
Under $10,000.......	1696	4.9	344	2.5
$ 10,000 to $ 19,999........	2643	7.7	767	5.7
$ 20,000 to $ 24,999........	2323	6.8	533	3.9
$ 25,000 to $ 29,999........	2182	6.3	554	4.1
$ 30,000 to $ 34,999........	2451	7.1	712	5.3
$ 35,000 to $ 49,999........	6306	18.3	2767	20.5
$ 50,000 to $ 74,999........	8596	25.0	4202	31.1
$ 75,000 to $ 99,999........	4225	12.3	2146	15.9
$100,000 to $149,999........	2839	8.3	1214	9.0
$150,000 and Over..........	1113	3.2	262	1.9
1996 Fam. HHs by Fam. Hhld Inc.:	23206	%	11438	%
Under $10,000.......	662	2.9	215	1.9
$ 10,000 to $ 19,999........	1018	4.4	307	2.7
$ 20,000 to $ 24,999........	727	3.1	276	2.4
$ 25,000 to $ 29,999........	1050	4.5	305	2.7
$ 30,000 to $ 34,999........	923	4.0	300	2.6
$ 35,000 to $ 49,999........	2845	12.3	1205	10.5
$ 50,000 to $ 74,999........	5885	25.4	2991	26.1
$ 75,000 to $ 99,999........	4223	18.2	2741	24.0
$100,000 to $149,999........	4287	18.5	2452	21.4
$150,000 and Over..........	1586	6.8	646	5.6
1990 Fam. HH by 1989 Fam. HH Inc	22981	%	9737	%
Under $10,000.......	687	3.0	187	1.9
$ 10,000 to $ 19,999........	1350	5.9	457	4.7
$ 20,000 to $ 24,999........	1131	4.9	321	3.3
$ 25,000 to $ 29,999........	1064	4.6	324	3.3
$ 30,000 to $ 34,999........	1209	5.3	399	4.1
$ 35,000 to $ 49,999........	3637	15.8	1780	18.3
$ 50,000 to $ 74,999........	6530	28.4	3102	31.9
$ 75,000 to $ 99,999........	3704	16.1	1820	18.7
$100,000 to $149,999........	2637	11.5	1123	11.5
$150,000 and Over..........	1032	4.5	224	2.3

NOTE: When median household wealth is < $25,000 it will be listed as $24,999.

1996 estimates and 2001 projections produced by Claritas Inc.

Claritas Inc.
Sales (800)234-5973 Support (800)234-5629
Area 1 = Richmond Hwy A and B
Area 2 = Franconia

Attribute	Area 1		Area 2	
1996 Households by Hhold Wealth:	35394	%	16433	%
Less than $25,000..........	12413	35.1	4862	29.6
$ 25,000 to $ 49,999.........	2774	7.8	1289	7.8
$ 50,000 to $ 99,999.........	4146	11.7	2118	12.9
$100,000 to $249,999.........	7772	22.0	4140	25.2
$250,000 to $499,999.........	5088	14.4	2639	16.1
$500,000 and Over............	3201	9.0	1385	8.4
1996 Householders by Age:	35394	%	16433	%
15 to 24 Years...............	1543	4.4	670	4.1
25 to 34 Years...............	7883	22.3	4143	25.2
35 to 44 Years...............	9102	25.7	4740	28.8
45 to 54 Years...............	7314	20.7	3474	21.1
55 to 64 Years...............	4125	11.7	1788	10.9
65 to 74 Years...............	3438	9.7	1131	6.9
75 Years and Over............	1989	5.6	487	3.0
1996 Households by Hhold Inc:				
Age of Hholder 25-44 Years:	16985	%	8883	%
Under $15,000............	749	4.4	229	2.6
$ 15,000 to $ 24,999.........	1258	7.4	331	3.7
$ 25,000 to $ 34,999.........	2166	12.8	554	6.2
$ 35,000 to $ 49,999.........	3371	19.8	1176	13.2
$ 50,000 to $ 74,999.........	4815	28.3	2818	31.7
$ 75,000 to $ 99,999.........	2459	14.5	2034	22.9
$100,000 and Over............	2167	12.8	1741	19.6
Age of Hholder 45-64 Years:	11439	%	5262	%
Under $15,000..........	438	3.8	131	2.5
$ 15,000 to $ 24,999.........	527	4.6	175	3.3
$ 25,000 to $ 34,999.........	803	7.0	247	4.7
$ 35,000 to $ 49,999.........	1356	11.9	469	8.9
$ 50,000 to $ 74,999.........	2704	23.6	1351	25.7
$ 75,000 to $ 99,999.........	2129	18.6	1287	24.5
$100,000 and over............	3482	30.4	1602	30.4
Age of Householder 65+ Years:	5427	%	1618	%
Under $15,000..........	906	16.7	145	9.0
$ 15,000 to $ 24,999.........	578	10.7	190	11.7
$ 25,000 to $ 34,999.........	566	10.4	195	12.1
$ 35,000 to $ 49,999.........	642	11.8	209	12.9
$ 50,000 to $ 74,999.........	1115	20.5	429	26.5
$ 75,000 to $ 99,999.........	782	14.4	237	14.6
$100,000 and Over............	838	15.4	213	13.2
1990 Households by Hhold Type:	34399	%	13557	%
Male no Wife no Child........	630	1.8	191	1.4
Female no Husband no Child....	1581	4.6	551	4.1
Married Couple Family.........	18493	53.8	8492	62.6
Other Family Hhold Own Child..	2522	7.3	690	5.1
Non-Family....................	11173	32.5	3633	26.8

Claritas Inc.
Sales (800)234-5973 Support (800)234-5629
Area 1 = Richmond Hwy A and B
Area 2 = Franconia

Attribute	Area 1		Area 2	
1990 Pop. 65+ Yr. by HH Type:	8091	%	2035	%
Living Alone..................	1853	22.9	330	16.2
In Families...................	5954	73.6	1672	82.2
In Non-Families...............	116	1.4	33	1.6
In Group Quarters.............	168	2.1	0	0.0
1990 Marital status:				
For Population 15+ Years:	69860	%	29423	%
Never Married...............	19463	27.9	8188	27.8
Now Married (Exc. Separated)	38972	55.8	17466	59.4
Divorced or Separated.......	8164	11.7	2739	9.3
Widowed.....................	3261	4.7	1030	3.5
For Females 15+ Years:	36225	%	14800	%
Never Married...............	8967	24.8	3744	25.3
Now Married (Exc. Separated)	19569	54.0	8545	57.7
Divorced or Separated.......	4906	13.5	1572	10.6
Widowed.....................	2783	7.7	939	6.3
1990 Educational Attainment for Population 25+ Years:	59037	%	24682	%
Less than 9th Grade............	2639	4.5	813	3.3
9th to 12th Grade, No Diploma..	4521	7.7	1593	6.5
High School Graduate...........	13010	22.0	5421	22.0
Some College, No Degree........	11879	20.1	4931	20.0
Associate Degree...............	3237	5.5	1441	5.8
Bachelor's Degree..............	13828	23.4	6474	26.2
Graduate or Prof. Degree.......	9923	16.8	4009	16.2
1990 Pop. Age 16+, In Labor Frc:	52617	%	23611	%
Civilian Employed Males......	25025	47.6	10819	45.8
Civilian Employed Females....	23299	44.3	10391	44.0
Persons in Armed Forces.......	2668	5.1	1906	8.1
Persons Unemployed............	1625	3.1	495	2.1
1990 Occupat.-Employed pop. 16+:	48322	%	21211	%
Managerial/Prof. Spec.........	20650	42.7	9546	45.0
Exec/Admin/Managerial.......	10902	22.6	5203	24.5
Professional Specialty......	9748	20.2	4343	20.5
Tech./Sales/Admn. Support.....	15406	31.9	6862	32.4
Technician and Related......	2239	4.6	1029	4.9
Sales.......................	4858	10.1	2154	10.2
Administrative Support......	8309	17.2	3679	17.3
Service Occupation............	5192	10.7	2085	9.8
Private Household...........	237	0.5	64	0.3
Protective Service..........	946	2.0	549	2.6
Other Service...............	4009	8.3	1472	6.9
Farming/Forestry/Fishing......	345	0.7	108	0.5
Precision/Craft/Repair........	3653	7.6	1476	7.0
Operator/Fabricators/Laborer..	3076	6.4	1134	5.3
Machine Op/Assem./Inspect....	773	1.6	286	1.3
Trans. & Material Moving.....	1199	2.5	404	1.9
Handlers/Helpers/Laborers....	1104	2.3	444	2.1

Claritas Inc.
Sales (800)234-5973 Support (800)234-5629
Area 1 = Richmond Hwy A and B
Area 2 = Franconia

Attribute	Area 1		Area 2	
1990 Industry-Employed Pop. 16+:	48323	%	21207	%
Agriculture/Forestry/Fisheries	464	1.0	114	0.5
Mining..........................	28	0.1	0	0.0
Construction....................	3599	7.4	1416	6.7
Manufacturing-Nondurable Goods	1283	2.7	574	2.7
Manufacturing-Durable Goods...	1194	2.5	578	2.7
Transportation..................	1926	4.0	1095	5.2
Communications and Public Util	1378	2.9	497	2.3
Wholesales Trade..............	1077	2.2	541	2.6
Retail Trade....................	6529	13.5	2709	12.8
Finance/Insurance/Real Estate.	3791	7.8	1550	7.3
Business and Repair Services..	3042	6.3	1492	7.0
Personal Services.............	1523	3.2	650	3.1
Entertainment/Recreation Serv.	666	1.4	212	1.0
Professional and Related Serv.	12796	26.5	5162	24.3
Public Administration.........	9027	18.7	4617	21.8
1990 Pop. by Travel Time to Work:	50349	%	22767	%
Travel in Under 10 Minutes...	4543	9.0	2153	9.5
Travel in 10 to 14 Minutes....	3685	7.3	1444	6.3
Travel in 15 to 19 Minutes....	4692	9.3	2270	10.0
Travel in 20 to 29 Minutes....	9868	19.6	4517	19.8
Travel in 30 to 44 Minutes....	15178	30.1	6998	30.7
Travel in 45 to 59 Minutes....	7786	15.5	3405	15.0
Travel in 60 to 89 Minutes....	4002	7.9	1803	7.9
Travel in 90 Minutes and Over.	595	1.2	177	0.8
1990 Pop. by Transport. to Work:	50347	%	22767	%
Travel by Driving Alone.......	32483	64.5	15353	67.4
Travel by Carpool.............	8085	16.1	4126	18.1
Travel by Public transport....	7007	13.9	2247	9.9
Travel by Walking Only........	1107	2.2	277	1.2
Travel by Other Means.........	417	0.8	188	0.8
Working at Home...............	1248	2.5	576	2.5
1990 Housing Units:	36215	%	14218	%
Owner-Occupied Housing Units..	21526	59.4	9622	67.7
Renter-Occupied Housing Units.	12847	35.5	3803	26.7
Vacant Housing Units..........	1841	5.1	793	5.6
1990 Specified Owner-Occ. Housing Units by Value:	16659	%	8544	%
Under $ 20,000..............	18	0.1	13	0.2
$20,000 to $39,999.........	30	0.2	9	0.1
$40,000 to $49,999.........	18	0.1	9	0.1
$50,000 to $74,999.........	284	1.7	34	0.4
$75,000 to $99,999.........	843	5.1	109	1.3
$100,000 to $149,999.........	3291	19.8	1680	19.7
$150,000 to $199,999.........	3873	23.2	3539	41.4
$200,000 to $299,999.........	4918	29.5	2605	30.5
$300,000 to $499,999.........	2759	16.6	509	6.0
$500,000 and Over............	625	3.8	37	0.4
Median Housing Value.........	199596		183308	

Claritas Inc.
Sales (800)234-5973 Support (800)234-5629
Area 1 = Richmond Hwy A and B
Area 2 = Franconia

Attribute	Area 1		Area 2	
1990 Specified Renter-Occupied Units by Gross Rent:	12808	%	3796	%
With Cash Rent	12581	98.2	3269	86.1
Less than $100	92	0.7	2	0.1
$100 to $149	134	1.0	11	0.3
$150 to $199	83	0.6	16	0.4
$200 to $249	43	0.3	19	0.5
$250 to $299	27	0.2	24	0.6
$300 to $399	176	1.4	19	0.5
$400 to $499	595	4.6	57	1.5
$500 to $599	1334	10.4	141	3.7
$600 to $749	4570	35.7	700	18.4
$750 to $999	3607	28.2	1233	32.5
$1,000 or More	1920	15.0	1047	27.6
No Cash Rent	227	1.8	527	13.9
1990 Households by Vehicles:	34374	%	13423	%
0 Vehicles	2622	7.6	293	2.2
1 Vehicle Available	12488	36.3	3799	28.3
2 Vehicles Available	13137	38.2	6247	46.5
3 Vehicles Available	4578	13.3	2280	17.0
4 Vehicles Available	1173	3.4	609	4.5
5+ Vehicles Available	376	1.1	195	1.5
1990 Housing Units by Number of Units in Structure:	36213	%	14218	%
Single Detached Unit	15696	43.3	6665	46.9
Single Attached Unit	5553	15.3	4337	30.5
Structures with 2 Units	107	0.3	45	0.3
Structures w/ 3-4 Units	653	1.8	371	2.6
Structures w/ 5-9 Units	1941	5.4	608	4.3
Structures w/ 10-19 Units	6097	16.8	1672	11.8
Structures w/ 20-49 Units	985	2.7	371	2.6
Structures w/ 50+ Units	3560	9.8	21	0.1
Mobile Homes/Trailers or Other	1623	4.5	126	0.9
1990 Housing Units by Year Built:	36216	%	14217	%
Built 1989 to March 1990	452	1.2	937	6.6
Built 1985 to 1988	2845	7.9	3347	23.5
Built 1980 to 1984	2934	8.1	2174	15.3
Built 1970 to 1979	8863	24.5	2070	14.6
Built 1960 to 1969	10603	29.3	2406	16.9
Built 1950 to 1959	6507	18.0	2260	15.9
Built 1940 to 1949	3163	8.7	837	5.9
Built 1939 or Earlier	849	2.3	186	1.3
1990 HUs by Year Moved In:	34373	%	13424	%
Moved in 1989 to March 1990	7918	23.0	3590	26.7
Moved in 1985 to 1988	11558	33.6	5042	37.6
Moved in 1980 to 1984	4666	13.6	1436	10.7
Moved in 1970 to 1979	5451	15.9	1658	12.4
Moved in 1969 or Earlier	4780	13.9	1698	12.6

Claritas Inc.
Sales (800)234-5973 Support (800)234-5629
Area 1 = Richmond Hwy A and B
Area 2 = Franconia

Attribute	Area 1 ($000s)	Area 1 U.S. Index	Area 2 ($000s)	Area 2 U.S. Index
1996 Expenditures by Selected Product Categories(in thousands of dollars):				
Food at Home	$134078	98	$66311	104
Food Away From Home	$116279	129	$60691	145
Alcoholic Beverages at Home	$10326	126	$5159	135
Alcoholic Beverages Away From Home	$8253	136	$4463	159
Personal Care Products	$15365	120	$7966	134
Personal Care Services	$13130	124	$6495	132
Nonprescription Drugs	$5298	107	$2608	114
Women's Apparel	$33651	131	$17776	149
Men's Apparel	$19836	140	$10982	167
Girls' Apparel	$2695	101	$1507	122
Boys' Apparel	$3955	102	$2160	120
Infants' Apparel	$3358	106	$1809	122
Footwear (Excl. Infants)	$14839	121	$7735	136
Housekeeping Supplies	$17617	113	$9144	126
Lawn/Garden Supplies (Incl. Plants)	$3578	126	$1901	145
Domestic Services	$26656	146	$14935	176
Household Textiles	$6711	128	$3597	147
Furniture	$23409	129	$12964	154
Floor Coverings	$6331	127	$3813	165
Major Appliances	$8787	113	$4573	127
Small Appliances & Houseware	$5532	131	$2969	152
TV, Radio & Sound Equipment	$30992	124	$16573	143
Other Entertainment Equip./Services	$34292	129	$20320	164
Transportation	$321863	131	$175214	154
1996 Expenditures by Selected Store Type (in thousands of dollars):				
Building Materials & Supply Stores	$16494	111	$9319	135
Hardware Stores	$2374	117	$1313	139
Retail Nursery/Lawn/Garden Supply	$3685	127	$1973	147
Auto Supply Stores	$16588	130	$8883	149
Gasoline/Service Stations	$73233	118	$38619	133
Grocery Stores	$147484	101	$73504	109
Drug and Proprietary Stores	$27550	112	$13876	122
Eating Places	$115609	129	$60472	146
Drinking Places	$5717	134	$3052	154
Department Stores (Excl. Leased)	$77210	125	$41767	146
Apparel Stores	$31943	130	$17177	151
Shoe Stores	$8897	121	$4655	137
Furniture	$21206	130	$11700	154
Home Furnishing Stores	$11322	132	$6411	161
Household Appliance Stores	$4930	121	$2609	138
Radio/TV/Computer/Music Stores	$18098	133	$9870	156

Claritas Inc.
Sales (800)234-5973 Support (800)234-5629

1996 Male and Female Population Comparison

Area 1 = Richmond Hwy A and B

Males		Age		Females
199		85+	f	515
1213	mm	75-84	fff	1666
2895	mmmmmm	65-74	ffffffff	3575
3714	mmmmmmmm	55-64	fffffffff	4165
6074	mmmmmmmmmmmmmm	45-54	ffffffffffffff	6264
3780	mmmmmmmmm	40-44	fffffffff	4123
3844	mmmmmmmmm	35-39	ffffffffff	4176
3639	mmmmmmmm	30-34	fffffffff	3936
3804	mmmmmmmmm	25-29	fffffffff	3870
2529	mmmmmm	20-24	ffffff	2545
2135	mmmmm	15-19	ffff	2052
2504	mmmmm	10-14	fffff	2384
2864	mmmmmm	5-9	ffffff	2775
2862	mmmmmm	<5	ffffff	2838

Area 2 = Franconia

Males		Age		Females
46		85+		135
376	m	75-84	ff	473
1033	mmmmm	65-74	fffff	1220
1737	mmmmmmmm	55-64	ffffffff	1807
3071	mmmmmmmmmmmmmm	45-54	ffffffffffffff	2990
2093	mmmmmmmmmm	40-44	ffffffffff	2116
2202	mmmmmmmmmm	35-39	fffffffffff	2332
2147	mmmmmmmmmm	30-34	fffffffffff	2303
2024	mmmmmmmmm	25-29	ffffffffff	2165
1263	mmmmmm	20-24	ffffff	1259
1013	mmmm	15-19	ffff	917
1174	mmmmm	10-14	fffff	1146
1450	mmmmmmm	5-9	ffffff	1355
1485	mmmmmmm	<5	ffffff	1398

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Claritas Inc.
Sales (800)234-5973 Support (800)234-5629

1996 Total Population Comparison (%)

Area 1 = Richmond Hwy A and B
Area 2 = Franconia

Area 1		Age		Area 2
0.8		85+		0.4
3.3	111	75-84	1	2.0
7.4	1111111	65-74	11111	5.3
9.1	111111111	55-64	11111111	8.3
14.2	11111111111111	45-54	11111111111111	14.2
9.1	111111111	40-44	111111111	9.9
9.2	111111111	35-39	1111111111	10.6
8.7	111111111	30-34	1111111111	10.4
8.8	111111111	25-29	111111111	9.8
5.8	111111	20-24	11111	5.9
4.8	11111	15-19	1111	4.5
5.6	11111	10-14	11111	5.4
6.5	111111	5-9	111111	6.6
6.6	111111	<5	111111	6.7

Claritas Inc.
Sales (800)234-5973 Support (800)234-5629

1996 Households by Household Income (%):
(income ranges in thousands of dollars)

Area 1 = Richmond Hwy A and B
Area 2 = Franconia

Area 1		HH inc		Area 2
4.8	11	$150+	11	4.3
13.7	11111111	$100-$150	111111111	17.6
15.5	111111111	$ 75-$100	11111111111	22.2
25.1	111111111111111	$ 50-$ 75	11111111111111	28.9
16.1	111111111	$ 35-$ 50	111111	12.0
5.4	111	$ 30-$ 35	1	3.7
5.6	111	$ 25-$ 30	1	3.1
4.0	11	$ 20-$ 25	1	2.9
5.6	111	$ 10-$ 20	1	3.1
4.3	11	<$10	1	2.2

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Claritas Inc.
Sales (800)234-5973 Support (800)234-5629
Area 1 = USA

Attribute		Area 1	
Population:	2001 Total.........	277957536	
	1996 Total.........	264992224	
	1990 Total.........	248709872	
	1980 Total.........	226545776	
	% Change 90-96.....	6.5	
	% Change 80-90.....	9.8	
Households:	2001 Total.........	104288344	
	1996 Total.........	98935240	
	1990 Total.........	91947408	
	1980 Total.........	80389592	
	% Change 90-96.....	7.6	
	% Change 80-90.....	14.4	
Av. HH Size:	2001...............	2.60	
	1996...............	2.61	
	1990...............	2.63	
1996 Group Quarters Population..		6748841	
Families:	2001 Total.........	71736792	
	1996 Total.........	68685584	
	1990 Total.........	64517948	
	% Change 90-96.....	6.5	
Housing Units:	2001 Total.........	116086664	
	1996 Total.........	110058256	
	1990 Total.........	102263680	
1996 Population by Race/Hispanic		264992224	%
White (not Hispanic)..........		194193344	73.3
Black (not Hispanic)..........		31863414	12.0
Asian (not Hispanic)..........		8960911	3.4
All Other (not Hispanic)......		2181247	0.8
Hispanic Origin..............		27793304	10.5
1996 Pop. by Age:		264992224	%
Under 5 Years................		19278326	7.3
5 to 9 Years................		19411544	7.3
10 to 14 Years................		18566722	7.0
15 to 19 Years................		17022622	6.4
20 to 24 Years................		17634088	6.7
25 to 29 Years................		20556034	7.8
30 to 34 Years................		20602642	7.8
35 to 39 Years................		22039844	8.3
40 to 44 Years................		20427410	7.7
45 to 54 Years................		32382940	12.2
55 to 64 Years................		21884624	8.3
65 to 74 Years................		19319574	7.3
75 to 84 Years................		11705969	4.4
85 Years and Over............		4159894	1.6
Total Median Age (in Years)...		34.9	
Male Median Age (in Years)....		33.4	

Attribute	Area 1	
1996 Females by age:(see pp.9-10)	135773472	%
Under 5 years................	9492867	7.0
5 to 9 years................	9496837	7.0
10 to 14 years................	9055687	6.7
15 to 19 years................	8311478	6.1
20 to 24 years................	8507173	6.3
25 to 29 years................	10031430	7.4
30 to 34 years................	10316561	7.6
35 to 39 years................	11190383	8.2
40 to 44 years................	10396645	7.7
45 to 54 years................	16536700	12.2
55 to 64 years................	11485355	8.5
65 to 74 years................	10712060	7.9
75 to 84 years................	7226040	5.3
85 years and over.............	3014235	2.2
Female Median age (in years)..	36.2	
1996 White population by age:...	219533707	%
White under 5 years..........	15084075	6.9
White 5 to 17 years..........	38687180	17.6
White 18 to 44 years..........	87605496	39.9
White 45 to 64 years..........	46490320	21.2
White 65 years and over.......	31666636	14.4
1996 Black population by age:...	33477394	%
Black under 5 years..........	3160685	9.4
Black 5 to 17 years..........	7511052	22.4
Black 18 to 44 years..........	14550138	43.5
Black 45 to 64 years..........	5531742	16.5
Black 65 years and over.......	2723777	8.1
1996 Hispanic population by age:	27793304	%
Hispanic under 5 years.......	2957800	10.6
Hispanic 5 to 17 years.......	6613791	23.8
Hispanic 18 to 44 years.......	12585083	45.3
Hispanic 45 to 64 years.......	4072343	14.7
Hispanic 65 years and over....	1564287	5.6
Per capita inc.: 1996...........	$18415	
1989 (Census)..	$14396	
% Change 89-96.	27.9	
Avg. hhld inc.: 1996...........	$48762	
1989 (Census)..	$38499	
% Change 89-96	26.7	
Med. hhld inc.: 1996...........	$36625	
1989 (Census)..	$30097	
% Change 89-96.	21.7	
Med. Family HH inc.: 1996.......	$43942	
1989 (Census)..	$35926	
% Change 89-96.	22.3	

Claritas Inc.
Sales (800)234-5973 Support (800)234-5629
Area 1 = USA

Attribute	Area 1	
1996 Average Household Wealth...	$132998	
1996 Median Household Wealth....	$63860	
1996 Households by Hhld Income:.	98935240	%
(See pg.11) Under $10,000.......	11951913	12.1
$ 10,000 to $ 19,999........	14280093	14.4
$ 20,000 to $ 24,999........	7422092	7.5
$ 25,000 to $ 29,999........	6978469	7.1
$ 30,000 to $ 34,999........	6777709	6.9
$ 35,000 to $ 49,999........	17407132	17.6
$ 50,000 to $ 74,999........	18898264	19.1
$ 75,000 to $ 99,999........	8123279	8.2
$100,000 to $149,999........	5078750	5.1
$150,000 and Over...........	2017541	2.0
1990 Hholds by 1989 hhld income:	91947408	%
Under $10,000.......	14161533	15.4
$ 10,000 to $ 19,999........	16208311	17.6
$ 20,000 to $ 24,999........	8011915	8.7
$ 25,000 to $ 29,999........	7433159	8.1
$ 30,000 to $ 34,999........	7142688	7.8
$ 35,000 to $ 49,999........	16442610	17.9
$ 50,000 to $ 74,999........	13794971	15.0
$ 75,000 to $ 99,999........	4711357	5.1
$100,000 to $149,999........	2597143	2.8
$150,000 and Over...........	1443723	1.6
1996 Fam. HHs by Fam. Hhld Inc.:	68685584	%
Under $10,000.......	5005469	7.3
$ 10,000 to $ 19,999........	7467004	10.9
$ 20,000 to $ 24,999........	4628208	6.7
$ 25,000 to $ 29,999........	4548496	6.6
$ 30,000 to $ 34,999........	4687461	6.8
$ 35,000 to $ 49,999........	13129546	19.1
$ 50,000 to $ 74,999........	15819062	23.0
$ 75,000 to $ 99,999........	7081757	10.3
$100,000 to $149,999........	4489521	6.5
$150,000 and Over...........	1829061	2.7
1990 Fam. HH by 1989 Fam. HH Inc	64517948	%
Under $10,000.......	5704553	8.8
$ 10,000 to $ 19,999........	9486027	14.7
$ 20,000 to $ 24,999........	5375735	8.3
$ 25,000 to $ 29,999........	5322513	8.2
$ 30,000 to $ 34,999........	5370370	8.3
$ 35,000 to $ 49,999........	13400576	20.8
$ 50,000 to $ 74,999........	12044133	18.7
$ 75,000 to $ 99,999........	4212136	6.5
$100,000 to $149,999........	2322406	3.6
$150,000 and Over...........	1279498	2.0

NOTE: When median household wealth is < $25,000 it will be listed as $24,999.

1996 estimates and 2001 projections produced by Claritas Inc.

Claritas Inc.
Sales (800)234-5973 Support (800)234-5629
Area 1 = USA

Attribute	Area 1	
1996 Households by Hhold Wealth:	98935312	%
Less than $25,000...........	36206804	36.6
$ 25,000 to $ 49,999..........	9113461	9.2
$ 50,000 to $ 99,999..........	14961162	15.1
$100,000 to $249,999..........	23127764	23.4
$250,000 to $499,999..........	10742222	10.9
$500,000 and Over.............	4783828	4.8
1996 Householders by Age:	98935312	%
15 to 24 Years................	5233182	5.3
25 to 34 Years................	19080160	19.3
35 to 44 Years................	22374190	22.6
45 to 54 Years................	17807910	18.0
55 to 64 Years................	12333975	12.5
65 to 74 Years................	11881964	12.0
75 Years and Over.............	10223868	10.3
1996 Households by Hhold Inc:		
Age of Hholder 25-44 Years:	41454343	%
Under $15,000...........	5276485	12.7
$ 15,000 to $ 24,999..........	5465546	13.2
$ 25,000 to $ 34,999..........	6206061	15.0
$ 35,000 to $ 49,999..........	8686811	21.0
$ 50,000 to $ 74,999..........	9325478	22.5
$ 75,000 to $ 99,999..........	3733041	9.0
$100,000 and Over.............	2760921	6.7
Age of Hholder 45-64 Years:	30141883	%
Under $15,000...........	3958133	13.1
$ 15,000 to $ 24,999..........	3430560	11.4
$ 25,000 to $ 34,999..........	3667168	12.2
$ 35,000 to $ 49,999..........	5336580	17.7
$ 50,000 to $ 74,999..........	6906254	22.9
$ 75,000 to $ 99,999..........	3406702	11.3
$100,000 and over.............	3436486	11.4
Age of Householder 65+ Years:	22105832	%
Under $15,000..........	8144104	36.8
$ 15,000 to $ 24,999..........	4348491	19.7
$ 25,000 to $ 34,999..........	3015389	13.6
$ 35,000 to $ 49,999..........	2678376	12.1
$ 50,000 to $ 74,999..........	2227185	10.1
$ 75,000 to $ 99,999..........	862022	3.9
$100,000 and Over.............	830265	3.8
.990 Households by Hhold Type:	91993582	%
Male no Wife no Child.........	1674154	1.8
Female no Husband no Child....	4516507	4.9
Married Couple Family.........	51718214	56.2
Other Family Hhold Own Child..	7140553	7.8
Non-Family....................	26944154	29.3

1996 estimates and 2001 projections produced by Claritas Inc.

Claritas Inc.
Sales (800)234-5973 Support (800)234-5629
Area 1 = USA

Attribute	Area 1	
1990 Pop. 65+ Yr. by HH Type:	31195275	%
Living Alone..................	8989250	28.8
In Families...................	19942889	63.9
In Non-Families...............	532154	1.7
In Group Quarters.............	1730982	5.5
1990 Marital status:		
For Population 15+ Years:	195167742	%
Never Married...............	51634201	26.5
Now Married (Exc. Separated)	108390457	55.5
Divorced or Separated.......	20704716	10.6
Widowed.....................	14438368	7.4
For Females 15+ Years:	101424115	%
Never Married...............	23434118	23.1
Now Married (Exc. Separated)	53744847	53.0
Divorced or Separated.......	12117871	11.9
Widowed.....................	12127279	12.0
1990 Educational Attainment for Population 25+ Years:	158868436	%
Less than 9th Grade...........	16502211	10.4
9th to 12th Grade, No Diploma..	22841507	14.4
High School Graduate..........	47642763	30.0
Some College, No Degree........	29779777	18.7
Associate Degree...............	9791925	6.2
Bachelor's Degree..............	20832567	13.1
Graduate or Prof. Degree.......	11477686	7.2
1990 Pop. Age 16+, In Labor Frc:	125182378	%
Civilian Employed Males.......	62704579	50.1
Civilian Employed Females.....	52976623	42.3
Persons in Armed Forces.......	1708928	1.4
Persons Unemployed...........	7792248	6.2
1990 Occupat.-Employed pop. 16+:	115681202	%
Managerial/Prof. Spec.........	30533582	26.4
Exec/Admin/Managerial........	14227916	12.3
Professional Specialty.......	16305666	14.1
Tech./Sales/Admn. Support.....	36718398	31.7
Technician and Related.......	4257235	3.7
Sales........................	13634686	11.8
Administrative Support.......	18826477	16.3
Service Occupation............	15295917	13.2
Private Household............	521154	0.5
Protective Service...........	1992852	1.7
Other Service................	12781911	11.0
Farming/Forestry/Fishing......	2839010	2.5
Precision/Craft/Repair........	13097963	11.3
Operator/Fabricators/Laborer..	17196332	14.9
Machine Op/Assem./Inspect....	7904197	6.8
Trans. & Material Moving.....	4729001	4.1
Handlers/Helpers/Laborers....	4563134	3.9

Claritas Inc.
Sales (800)234-5973 Support (800)234-5629
Area 1 = USA

Attribute	Area 1	
1990 Industry-Employed Pop. 16+:	115681202	%
Agriculture/Forestry/Fisheries	3115372	2.7
Mining........................	723423	0.6
Construction..................	7214763	6.2
Manufacturing-Nondurable Goods	8053234	7.0
Manufacturing-Durable Goods...	12408844	10.7
Transportation................	5108003	4.4
Communications and Public Util	3097059	2.7
Wholesales Trade..............	5071026	4.4
Retail Trade..................	19485666	16.8
Finance/Insurance/Real Estate.	7984870	6.9
Business and Repair Services..	5577462	4.8
Personal Services.............	3668696	3.2
Entertainment/Recreation Serv.	1636460	1.4
Professional and Related Serv.	26998247	23.3
Public Administration.........	5538077	4.8
1990 Pop. by Travel Time to Work:	115070274	%
Travel in Under 10 Minutes...	21663946	18.8
Travel in 10 to 14 Minutes....	17954128	15.6
Travel in 15 to 19 Minutes....	19026053	16.5
Travel in 20 to 29 Minutes....	22436930	19.5
Travel in 30 to 44 Minutes....	20053109	17.4
Travel in 45 to 59 Minutes....	7191455	6.2
Travel in 60 to 89 Minutes....	4980662	4.3
Travel in 90 Minutes and Over.	1763991	1.5
1990 Pop. by Transport. to Work:	115070274	%
Travel by Driving Alone.......	84215298	73.2
Travel by Carpool.............	15377634	13.4
Travel by Public transport....	6069589	5.3
Travel by Walking Only........	4488886	3.9
Travel by Other Means.........	1512842	1.3
Working at Home...............	3406025	3.0
1990 Housing Units:	102263678	%
Owner-Occupied Housing Units..	59031378	57.7
Renter-Occupied Housing Units.	32916032	32.2
Vacant Housing Units..........	10316268	10.1
1990 Specified Owner-Occ. Housing Units by Value:	44918008	%
Under $ 20,000...............	1937962	4.3
$20,000 to $39,999.........	5561246	12.4
$40,000 to $49,999.........	3903314	8.7
$50,000 to $74,999.........	9899666	22.0
$75,000 to $99,999.........	7057792	15.7
$100,000 to $149,999.........	6773257	15.1
$150,000 to $199,999.........	4017162	8.9
$200,000 to $299,999.........	3376901	7.5
$300,000 to $499,999.........	1708156	3.8
$500,000 and Over............	682544	1.5
Median Housing Value.........	79097	

Claritas Inc.
Sales (800)234-5973 Support (800)234-5629
Area 1 = USA

Attribute	Area 1	
1990 Specified Renter-Occupied Units by Gross Rent:	32170036	%
With Cash Rent.................	30750693	95.6
Less than $100..............	541709	1.7
$100 to $149.................	1124987	3.5
$150 to $199.................	1148394	3.6
$200 to $249.................	1553000	4.8
$250 to $299.................	2183190	6.8
$300 to $399.................	5879202	18.3
$400 to $499.................	5935049	18.4
$500 to $599.................	4406961	13.7
$600 to $749.................	4064402	12.6
$750 to $999.................	2637755	8.2
$1,000 or More................	1276044	4.0
No Cash Rent...................	1419343	4.4
1990 Households by Vehicles:	91947410	%
0 Vehicles....................	10602297	11.5
1 Vehicle Available..........	31038711	33.8
2 Vehicles Available.........	34361045	37.4
3 Vehicles Available.........	11504832	12.5
4 Vehicles Available.........	3263419	3.5
5+ Vehicles Available.........	1177106	1.3
1990 Housing Units by Number of Units in Structure:	102263678	%
Single Detached Unit..........	60295750	59.0
Single Attached Unit..........	5420726	5.3
Structures with 2 Units.......	4987392	4.9
Structures w/ 3-4 Units.......	4966604	4.9
Structures w/ 5-9 Units.......	4946639	4.8
Structures w/ 10-19 Units.....	4906383	4.8
Structures w/ 20-49 Units.....	3901980	3.8
Structures w/ 50+ Units.......	4442549	4.3
Mobile Homes/Trailers or Other	8395655	8.2
1990 Housing Units by Year Built:	102263678	%
Built 1989 to March 1990......	2169436	2.1
Built 1985 to 1988............	9024365	8.8
Built 1980 to 1984............	9931917	9.7
Built 1970 to 1979............	22291826	21.8
Built 1960 to 1969............	16506410	16.1
Built 1950 to 1959............	14831071	14.5
Built 1940 to 1949............	8676155	8.5
Built 1939 or Earlier	18832498	18.4
1990 HUs by Year Moved In:	91947410	%
Moved in 1989 to March 1990...	19208023	20.9
Moved in 1985 to 1988.........	25963818	28.2
Moved in 1980 to 1984.........	12844781	14.0
Moved in 1970 to 1979.........	17102506	18.6
Moved in 1969 or Earlier......	16828282	18.3

Claritas Inc.
Sales (800)234-5973 Support (800)234-5629
Area 1 = USA

Attribute	Area 1	
1996 Expenditures by Selected Product Categories(in thousands of dollars):	($000s)	U.S. Index
Food at Home	$383121460	100
Food Away From Home	$252623579	100
Alcoholic Beverages at Home	$22974679	100
Alcoholic Beverages Away From Home	$16942050	100
Personal Care Products	$35826573	100
Personal Care Services	$29708524	100
Nonprescription Drugs	$13800000	100
Women's Apparel	$71840000	100
Men's Apparel	$39552999	100
Girls' Apparel	$7443000	100
Boys' Apparel	$10873996	100
Infants' Apparel	$8894330	100
Footwear (Excl. Infants)	$34340249	100
Housekeeping Supplies	$43685242	100
Lawn/Garden Supplies (Incl. Plants)	$7911457	100
Domestic Services	$50971066	100
Household Textiles	$14700000	100
Furniture	$50629632	100
Floor Coverings	$13900000	100
Major Appliances	$21657958	100
Small Appliances & Houseware	$11760398	100
TV, Radio & Sound Equipment	$69686835	100
Other Entertainment Equip./Services	$74536833	100
Transportation	$687013138	100
1996 Expenditures by Selected Store Type (in thousands of dollars):	($000s)	U.S. Index
Building Materials & Supply Stores	$41673120	100
Hardware Stores	$5670576	100
Retail Nursery/Lawn/Garden Supply	$8091399	100
Auto Supply Stores	$35777945	100
Gasoline/Service Stations	$174163352	100
Grocery Stores	$407137264	100
Drug and Proprietary Stores	$68496114	100
Eating Places	$250161166	100
Drinking Places	$11960319	100
Department Stores (Excl. Leased)	$172553363	100
Apparel Stores	$68702918	100
Shoe Stores	$20493997	100
Furniture	$45771632	100
Home Furnishing Stores	$23911220	100
Household Appliance Stores	$11344316	100
Radio/TV/Computer/Music Stores	$38108988	100

Claritas Inc.
Sales (800)234-5973
Support (800)234-5629

1996 Male and Female Population Comparison

Area 1 = USA

Males		Age		Females
1145659	m	85+	ff	3014235
4479929	mmmm	75-84	ffffff	7226040
8607513	mmmmmmm	65-74	fffffffff	10712060
10399267	mmmmmmmmm	55-64	ffffffffff	11485355
15846239	mmmmmmmmmmmmmm	45-54	fffffffffffffff	16536700
10030764	mmmmmmmmm	40-44	fffffffff	10396645
10849461	mmmmmmmmm	35-39	ffffffffff	11190383
10286081	mmmmmmmmm	30-34	fffffffff	10316561
10524604	mmmmmmmmm	25-29	fffffffff	10031430
9126914	mmmmmmmm	20-24	fffffff	8507173
8711144	mmmmmmm	15-19	fffffff	8311478
9511034	mmmmmmmm	10-14	ffffffff	9055687
9914707	mmmmmmmm	5-9	ffffffff	9496837
9785459	mmmmmmmm	<5	ffffffff	9492867

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Claritas Inc.
Sales (800)234-5973 Support (800)234-5629

1996 Total Population Comparison (%)

Area 1 = USA

Area 1		Age		Area 1
1.6	1	85+	1	1.6
4.4	11111	75-84	11111	4.4
7.3	11111111	65-74	11111111	7.3
8.3	1111111111	55-64	1111111111	8.3
12.2	111111111111111	45-54	111111111111111	12.2
7.7	111111111	40-44	111111111	7.7
8.3	1111111111	35-39	1111111111	8.3
7.8	111111111	30-34	111111111	7.8
7.8	111111111	25-29	111111111	7.8
6.7	11111111	20-24	11111111	6.7
6.4	1111111	15-19	1111111	6.4
7.0	11111111	10-14	11111111	7.0
7.3	11111111	5-9	11111111	7.3
7.3	11111111	<5	11111111	7.3

Claritas Inc.
Sales (800)234-5973 Support (800)234-5629

1996 Households by Household Income (%):
(income ranges in thousands of dollars)

Area 1 = USA

Area 1		HH inc		Area 1
2.0	1	$150+	1	2.0
5.1	1111	$100-$150	1111	5.1
8.2	111111	$ 75-$100	111111	8.2
19.1	111111111111111	$ 50-$ 75	111111111111111	19.1
17.6	1111111111111	$ 35-$ 50	1111111111111	17.6
6.9	11111	$ 30-$ 35	11111	6.9
7.1	11111	$ 25-$ 30	11111	7.1
7.5	11111	$ 20-$ 25	11111	7.5
14.4	11111111111	$ 10-$ 20	11111111111	14.4
12.1	111111111	<$10	111111111	12.1

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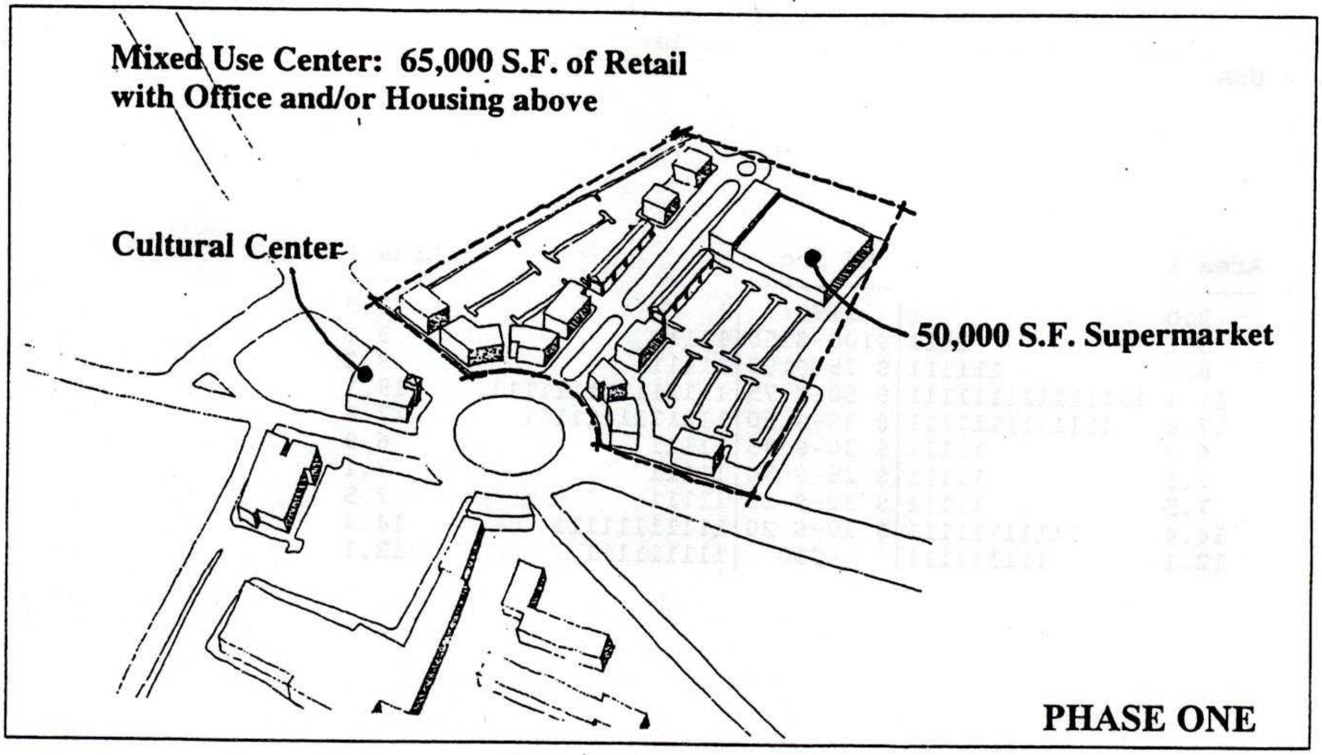
1996 estimates and 2001 projections produced by Claritas Inc.

EXHIBIT IV-4


Mixed Use Center: 65,000 S.F. of Retail with Office and/or Housing above
Cultural Center
50,000 S.F. Supermarket
PHASE ONE

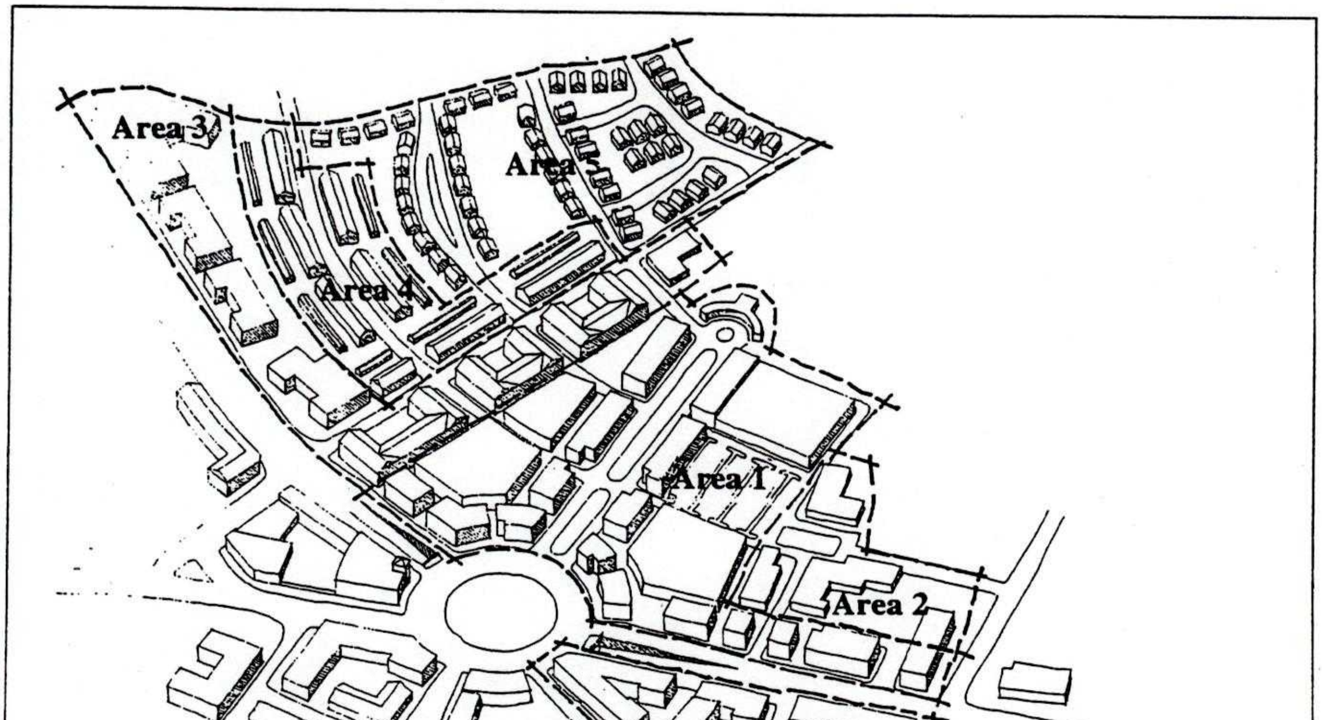
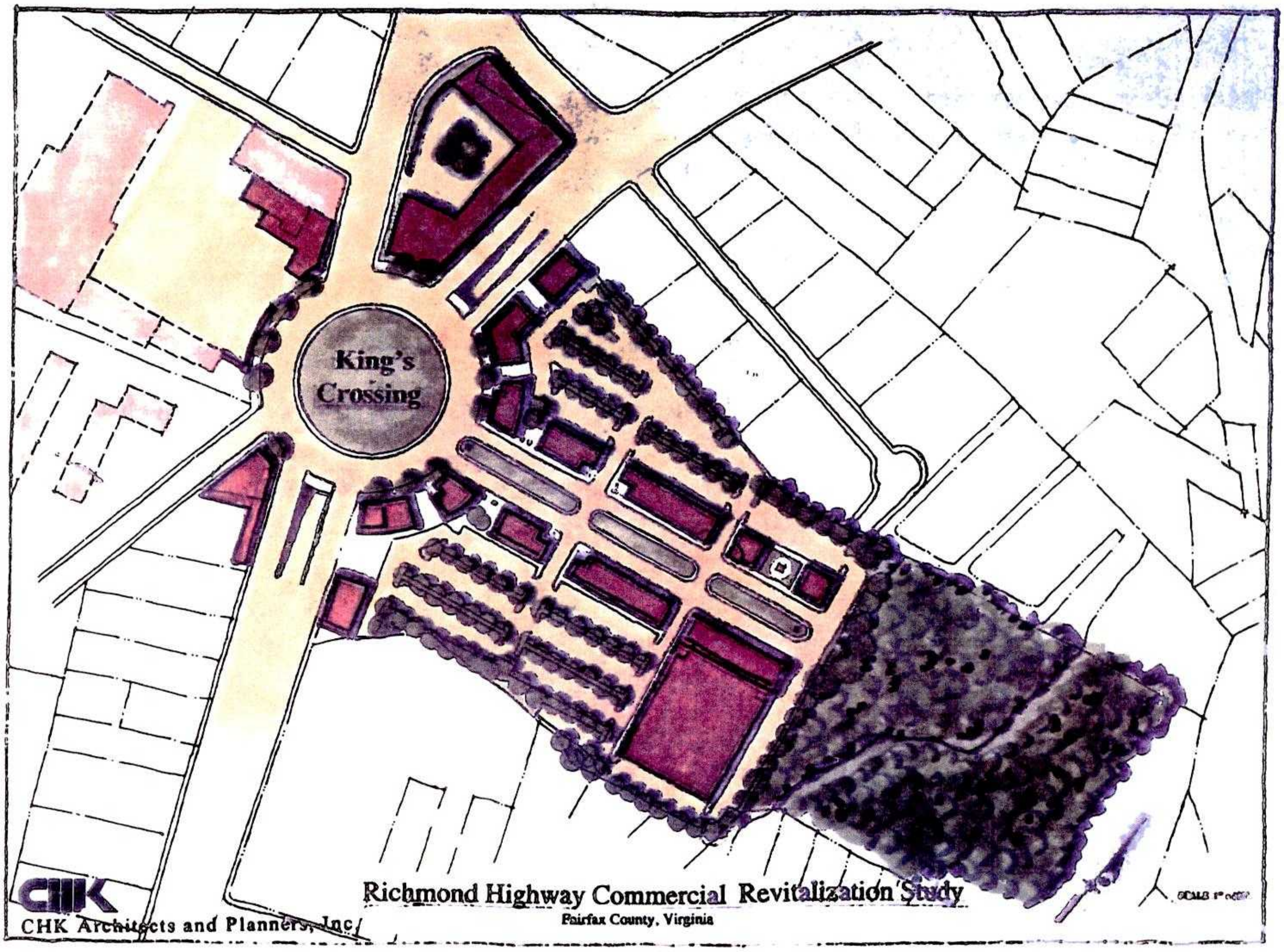

Area 3
Area 5
Area 4
Area 1
Area 2
Area 6
PHASE TWO

EXHIBIT I-5


King's Crossing
CHK
CHK Architects and Planners, Inc.
Richmond Highway Commercial Revitalization Study
Fairfax County, Virginia

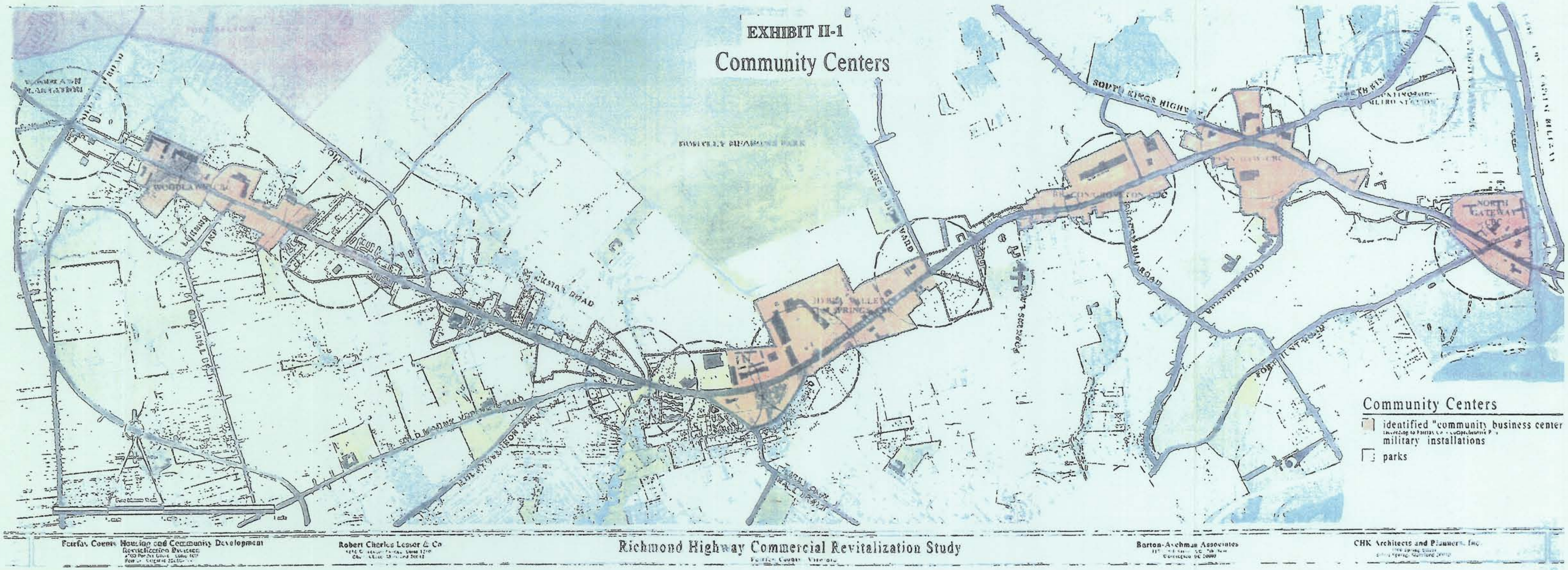


EXHIBIT II-1
Community Centers
WOODLAWN
SOUTH KINGS HIGHWAY
NORTH GATEWAY
Community Centers
identified "community business center
military installations
parks
Fairfax County Housing and Community Development
Revitalization Division
Robert Charles Lesser & Co
Richmond Highway Commercial Revitalization Study
Barton-Aschman Associates
CHK Architects and Planners, Inc

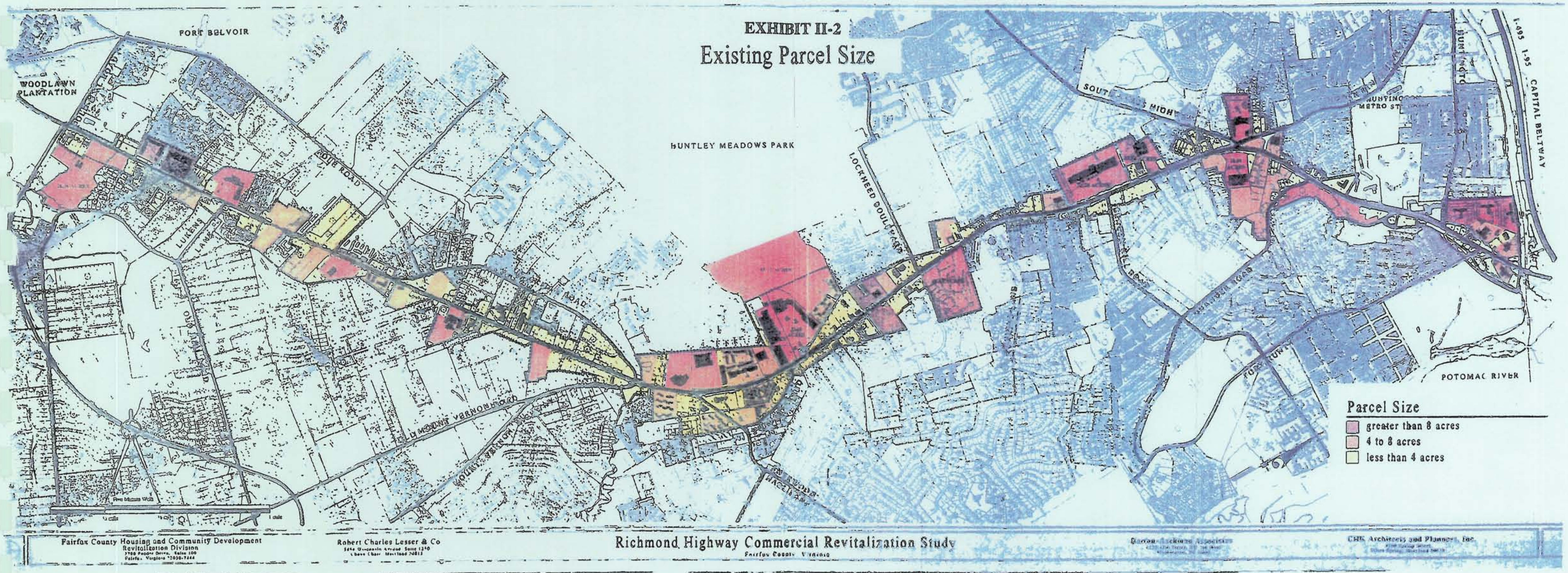


EXHIBIT II-2
Existing Parcel Size
FORT BELVOIR
WOODLAWN PLANTATION
HUNTLEY MEADOWS PARK
LOCKHEED BOULEVARD
CAPITAL BELTWAY
POTOMAC RIVER
Parcel Size
greater than 8 acres
4 to 8 acres
less than 4 acres
Fairfax County Housing and Community Development
Revitalization Division
Robert Charles Lesser & Co
Richmond Highway Commercial Revitalization Study
CHK Architects and Planners, Inc.

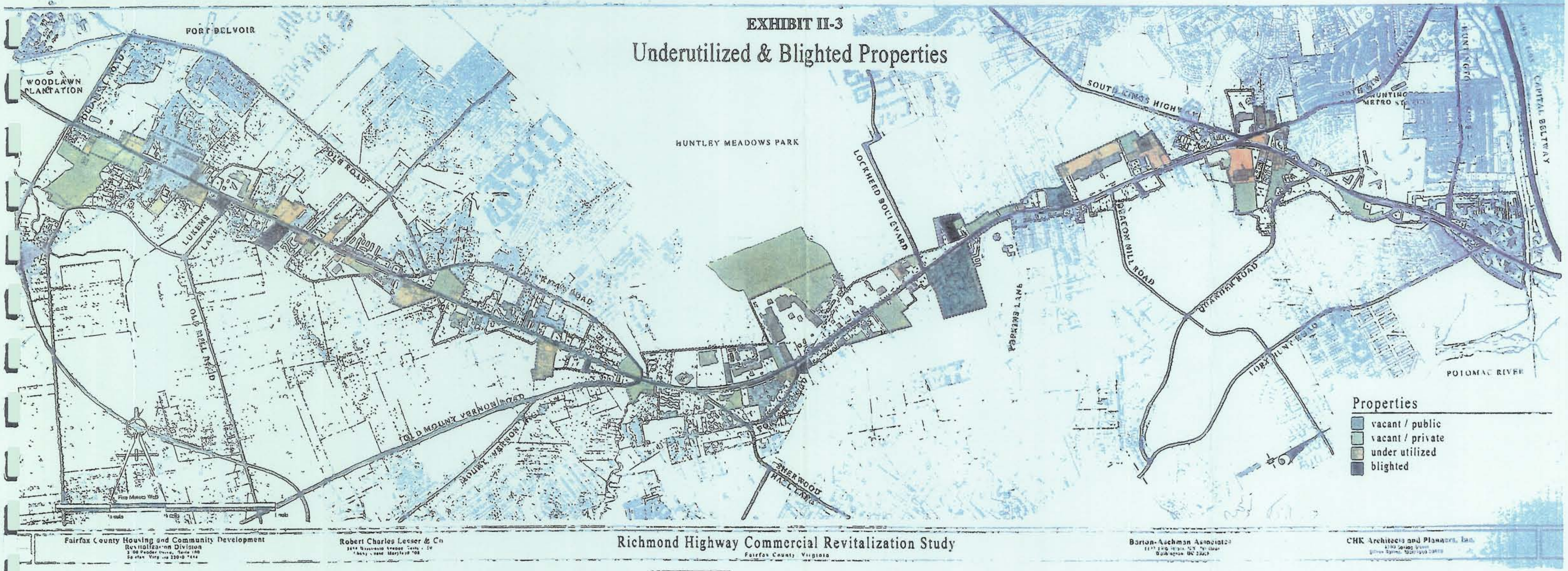


EXHIBIT II-3
Underutilized & Blighted Properties
FORT BELVOIR
WOODLAWN PLANTATION
HUNTLEY MEADOWS PARK
LOCKHEED BOULEVARD
SOUTH KINGS HIGHWAY
CAPITAL BELTWAY
LUKENS
LAKE
OLD MILL ROAD
OLD MOUNT VERNON ROAD
MOUNT VERNON
SHERWOOD HALL LANE
HOPKINS LANE
BEACON MILL ROAD
QUANDER ROAD
FORT HUNT ROAD
POTOMAC RIVER
Properties
vacant / public
vacant / private
under utilized
blighted
Fairfax County Housing and Community Development
Revitalization Division
Robert Charles Lesser & Co
Richmond Highway Commercial Revitalization Study
Fairfax County, Virginia
Barton-Aschman Associates
CHK Architects and Planners, Inc.

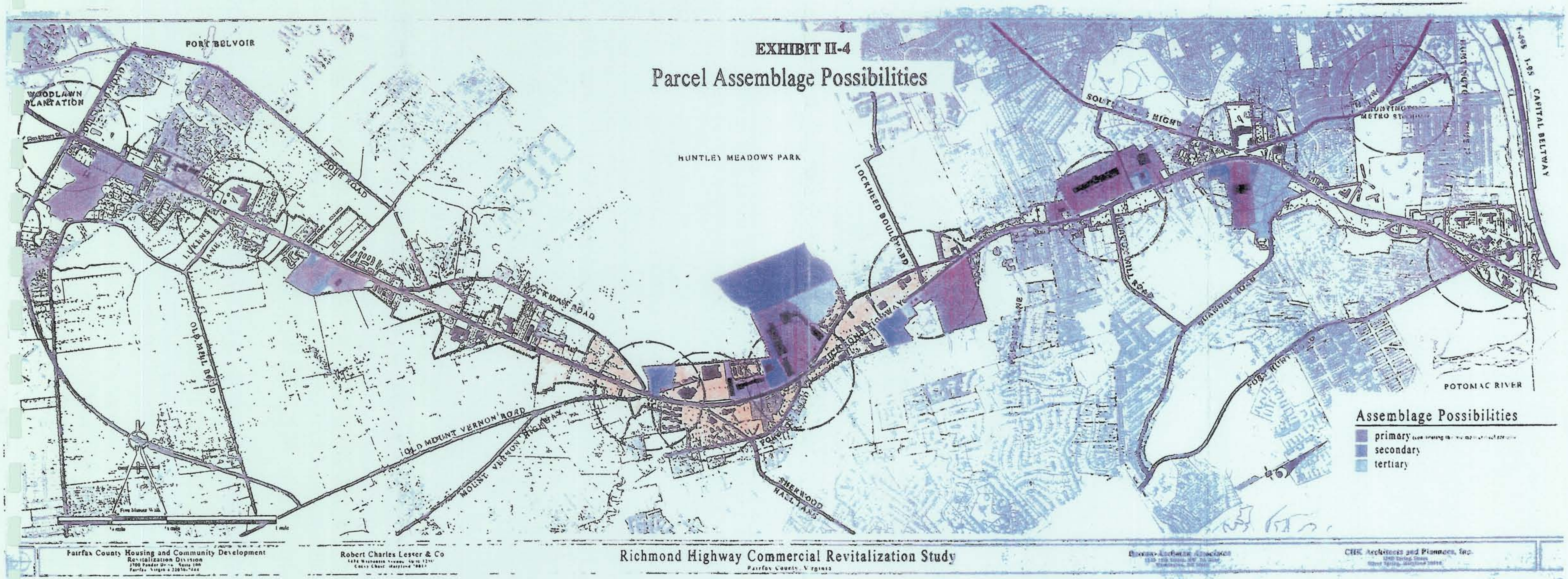


EXHIBIT II-4
Parcel Assemblage Possibilities
FORT BELVOIR
WOODLAWN PLANTATION
HUNTLEY MEADOWS PARK
LOCKHEED BOULEVARD
LUKENS LANE
OLD MILL ROAD
OLD MOUNT VERNON ROAD
MOUNT VERNON HIGHWAY
SHERWOOD HALL LANE
FORT HUNT ROAD
POTOMAC RIVER
CAPITAL BELTWAY
Assemblage Possibilities
primary
secondary
tertiary
Fairfax County Housing and Community Development
Revitalization Division
Robert Charles Lesser & Co
Richmond Highway Commercial Revitalization Study
Fairfax County, Virginia
CHK Architects and Planners, Inc.

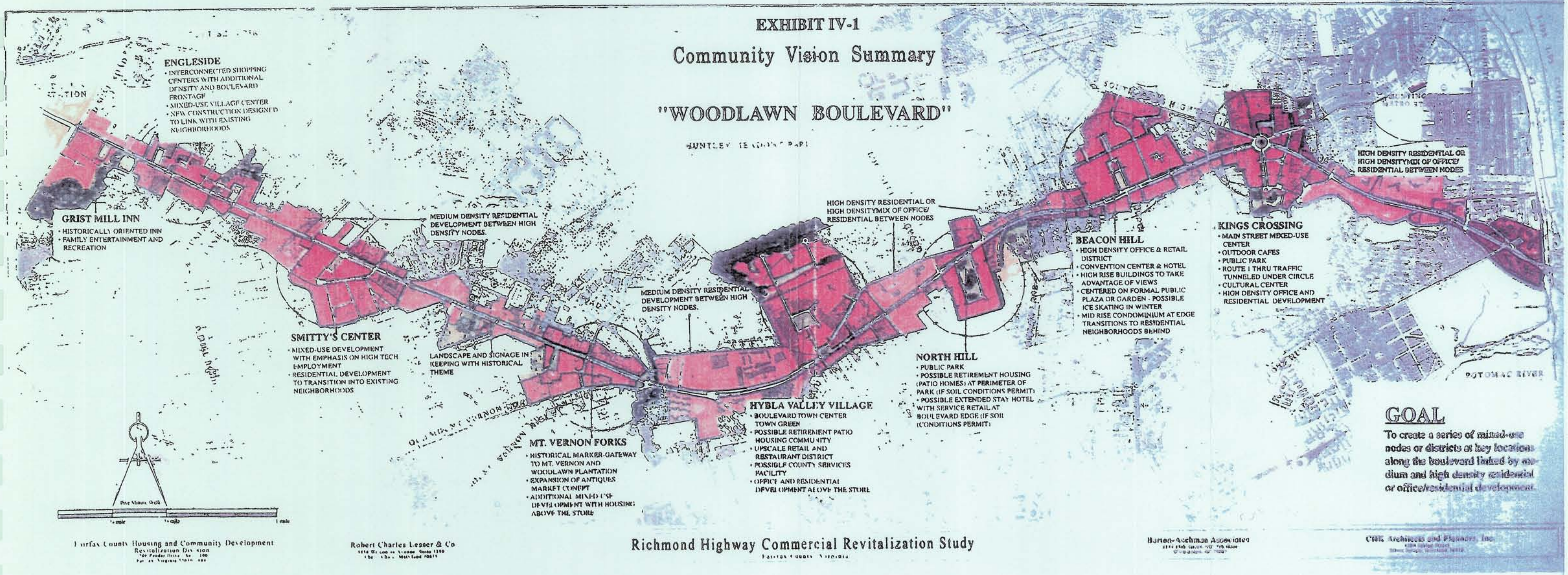


EXHIBIT IV-1
Community Vision Summary

EXHIBIT IV-2

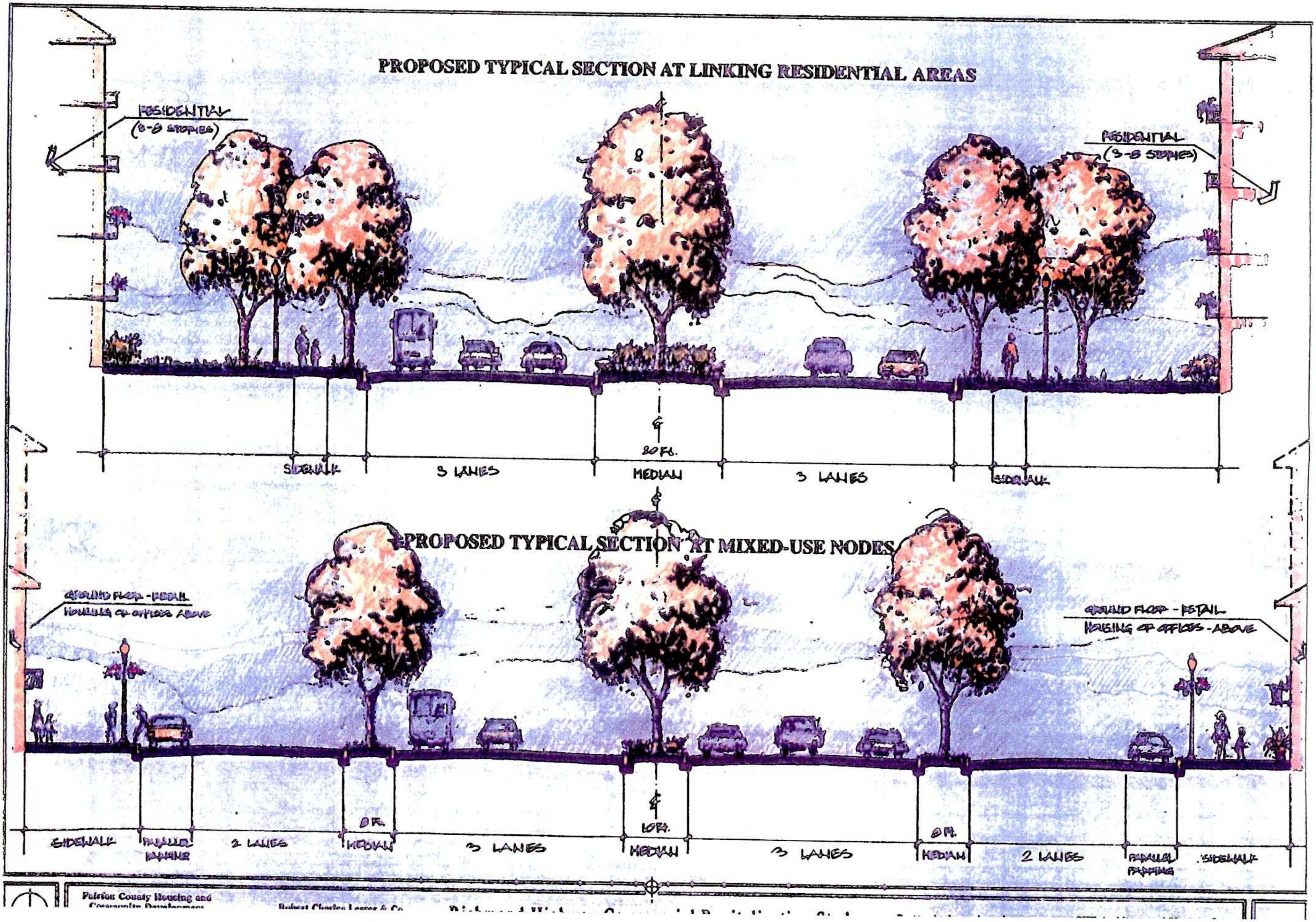
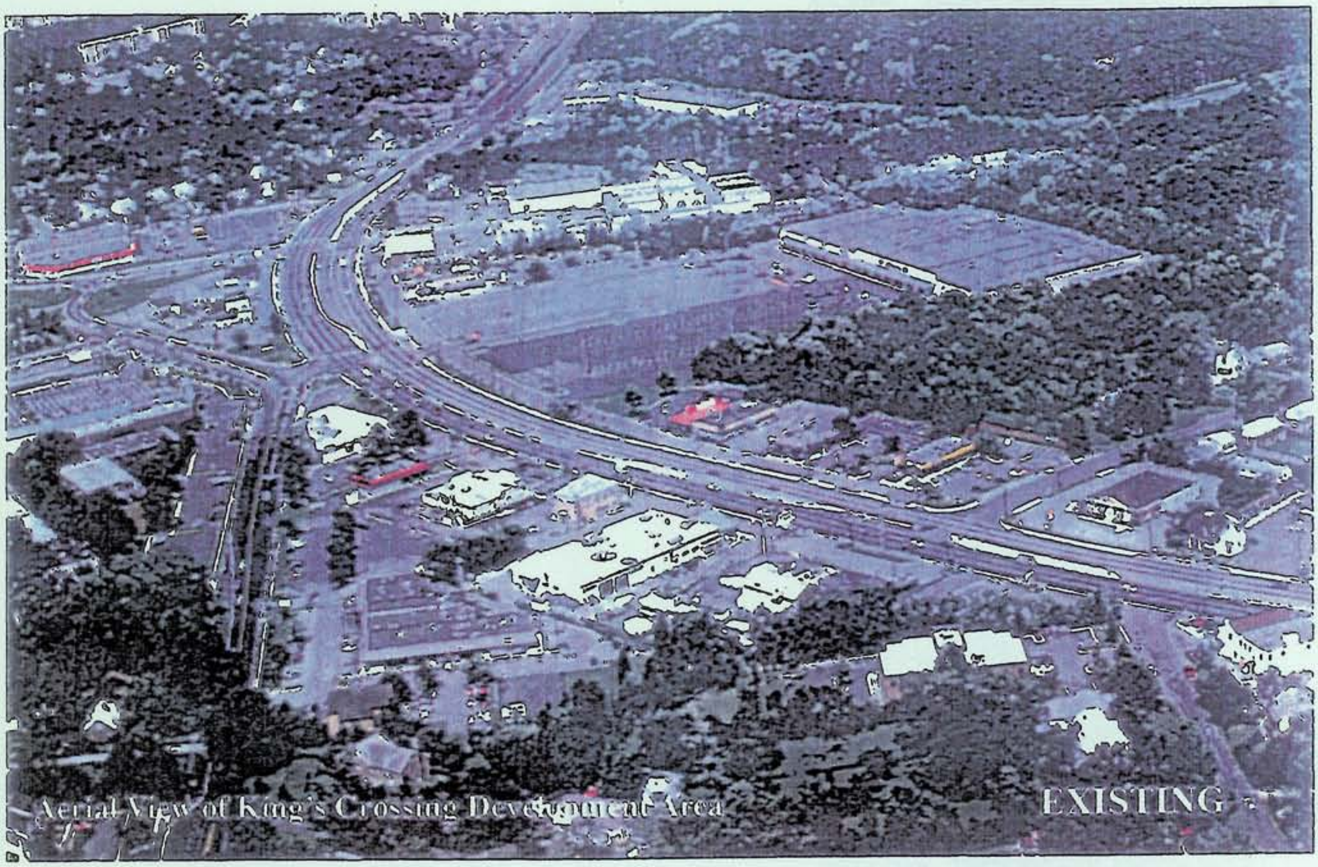

PROPOSED TYPICAL SECTION AT LINKING RESIDENTIAL AREAS
RESIDENTIAL
(3-8 STORIES)
RESIDENTIAL
(3-8 STORIES)
SIDEWALK
3 LANES
20 Ft.
MEDIAN
3 LANES
SIDEWALK
PROPOSED TYPICAL SECTION AT MIXED-USE NODES
GROUND FLOOR - RETAIL
HOUSING OR OFFICES ABOVE
GROUND FLOOR - RETAIL
HOUSING OR OFFICES - ABOVE
SIDEWALK
PARALLEL PARKING
2 LANES
8 Ft.
MEDIAN
3 LANES
10 Ft.
MEDIAN
3 LANES
8 Ft.
MEDIAN
2 LANES
PARALLEL PARKING
SIDEWALK
Fairfax County Housing and Community Development
Robert Charles Lesser & Co.

EXHIBIT IV-3


Aerial View of King's Crossing Development Area
EXISTING


Aerial View of King's Crossing Development Area
PROPOSED