

**STAFF REPORT
CONTINUED FROM LAST LINK**

#5

Exhibit 3

SUBJECT SITE BOUNDARIES AND SURROUNDING AREA
POTOMAC YARD: LAND BAYS F, G, H, AND PARTIAL I
OCTOBER 2008

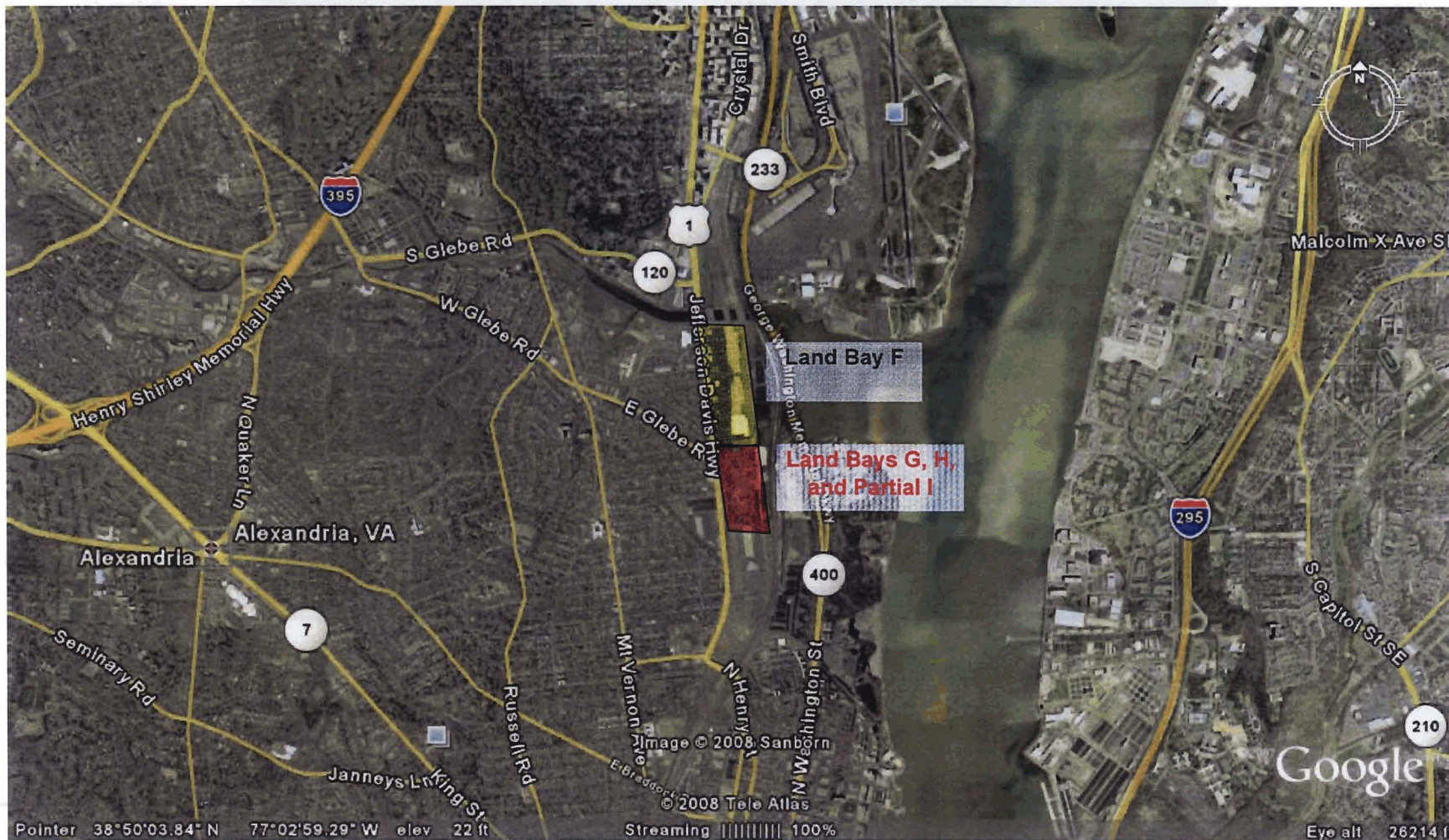
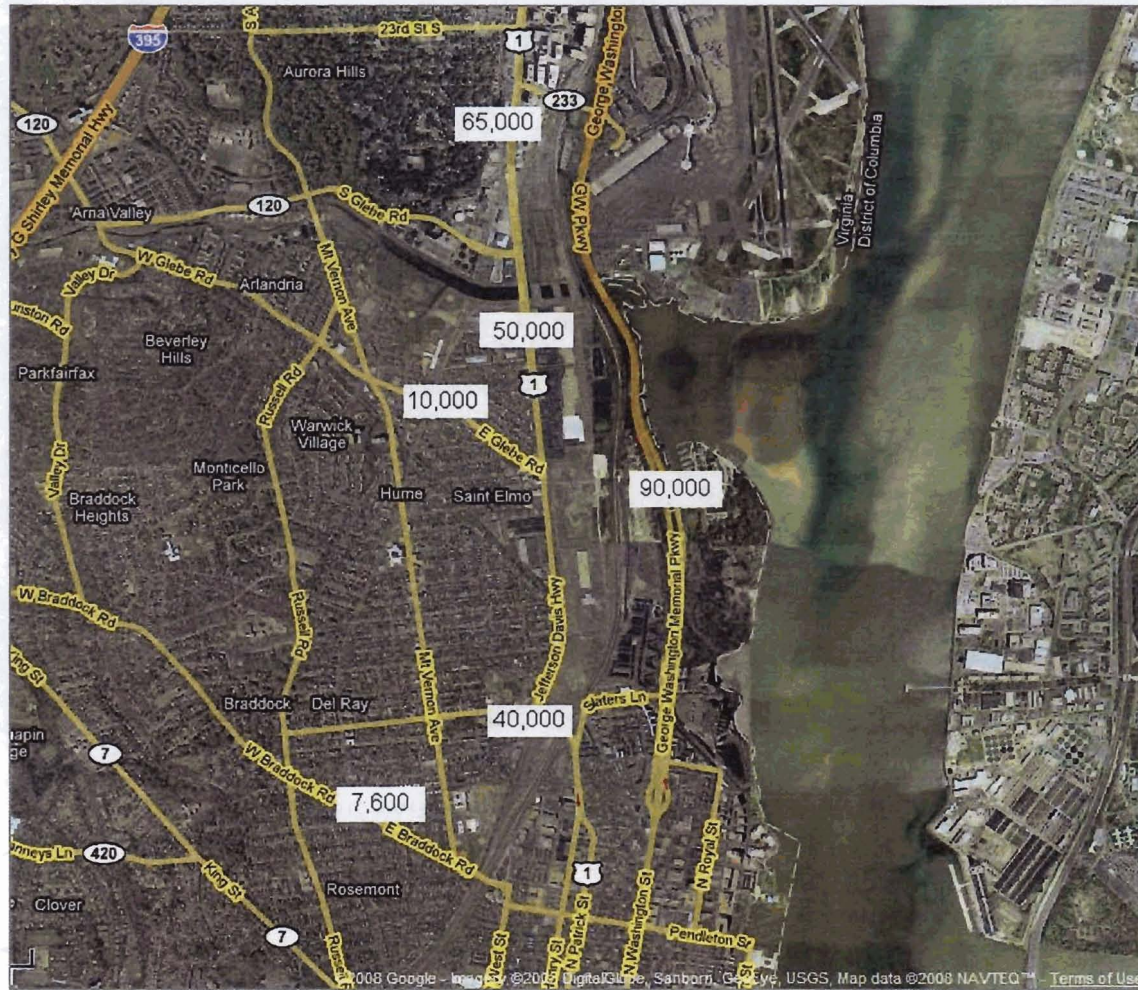


Exhibit 4

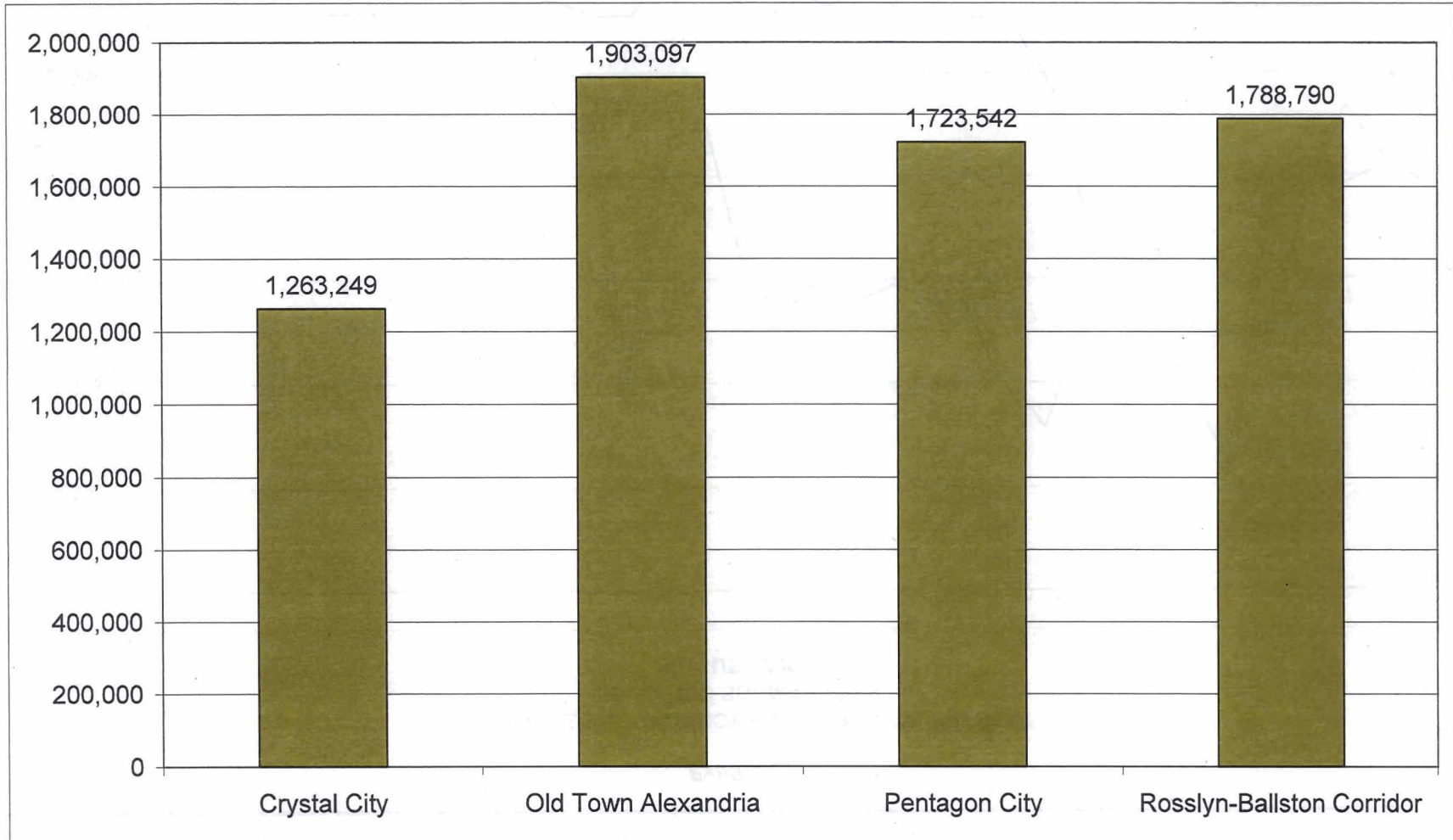
TRAFFIC COUNTS
POTOMAC YARD SITE AND VICINITY
2007



SOURCE: Virginia Department of Transportation

Exhibit 5

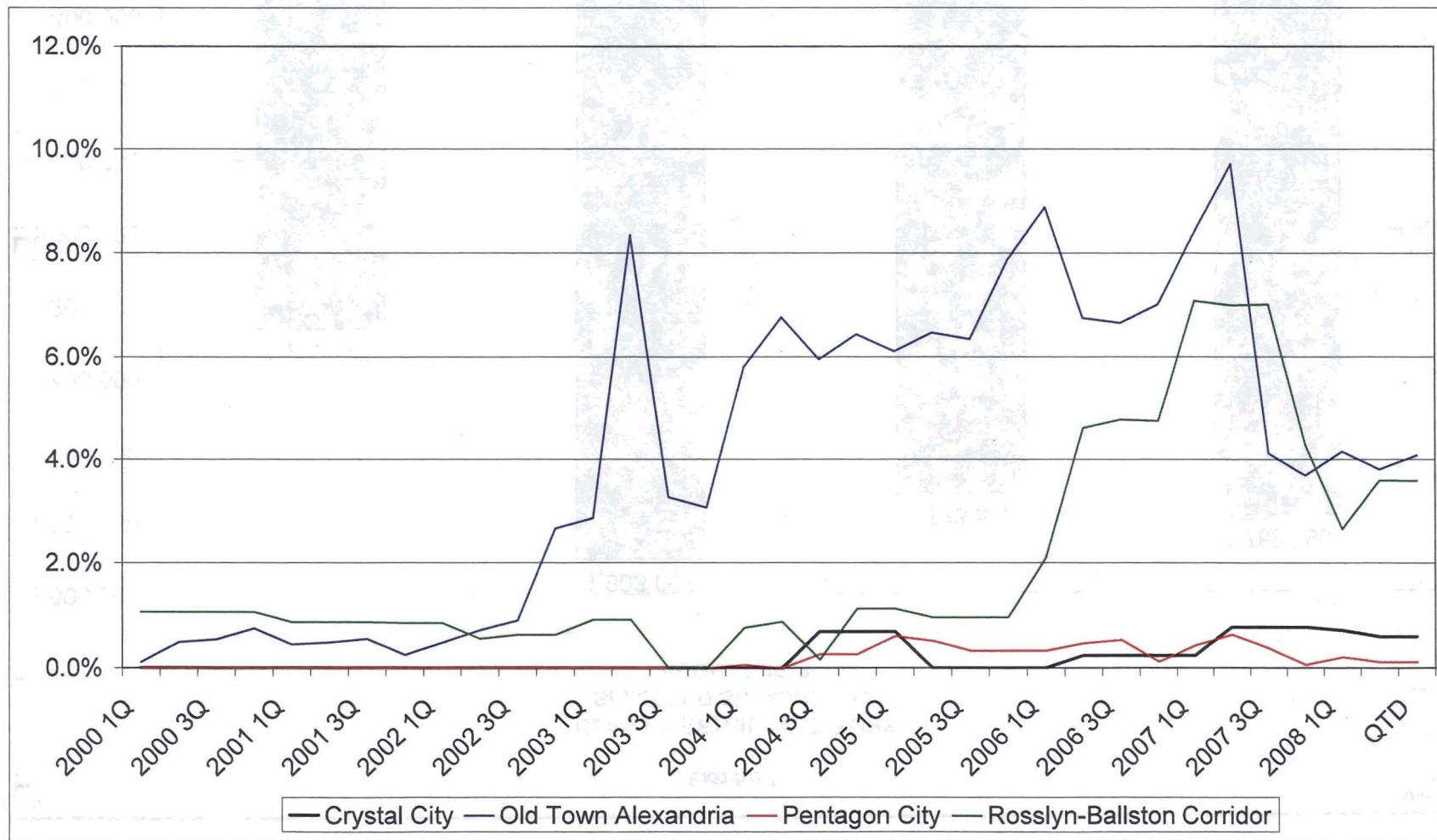
CLASS A RETAIL INVENTORY
SELECTED SUBMARKETS
AUGUST 2008



SOURCE: Costar

Exhibit 6

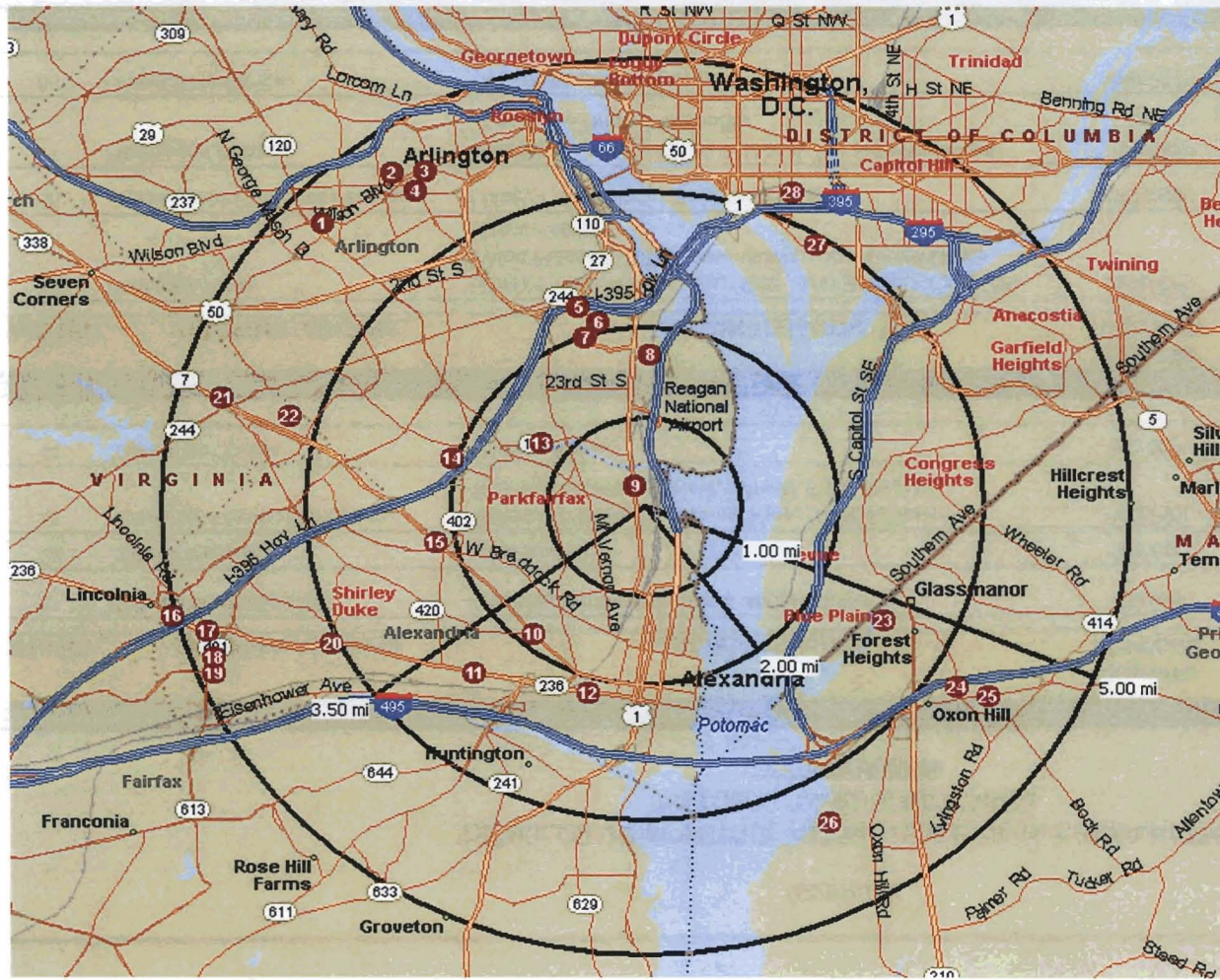
CLASS A RETAIL VACANCY RATES, 2000 TO PRESENT
SELECTED SUBMARKETS
AUGUST 2008



SOURCE: Costar

Exhibit 7

MAP OF COMPETITIVE RETAIL PROJECTS
POTOMAC YARD STUDY AREA
OCTOBER 2008



MAP KEY SHOPPING CENTER NAME

- | | |
|----|------------------------------|
| 1 | Ballston Common Mall |
| 2 | 2900 Clarendon |
| 3 | Clarendon Market Commons |
| 4 | Clarendon Center |
| 5 | Pentagon Row |
| 6 | The Fashion Centre |
| 7 | Pentagon Centre |
| 8 | Crystal City Shops |
| 9 | Potomac Yard Center |
| 10 | Summit Center |
| 11 | Alexandria Commons |
| 12 | King Street Station |
| 13 | Shirley Park Shopping Center |
| 14 | The Village at Shirlington |
| 15 | Bradlee Shopping Center |
| 16 | Foxchase Shopping Center |
| 17 | Plaza at Landmark |
| 18 | Landmark Mall |
| 19 | Van Dorn Plaza |
| 20 | Van Dorn Center |
| 21 | Baileys Crossroads Center |
| 22 | Leesburg Pike Plaza |
| 23 | Eastover Shopping Center |
| 24 | Oxon Hill Plaza |
| 25 | Rivertowne Commons |
| 26 | National Harbor |
| 27 | Waterfront |
| 28 | The Old Post Office Pavilion |

SOURCE: CoStar; NRB 2006 Shopping Center Directory; RCLCO

Exhibit 8

DETAIL OF COMPETITIVE RETAIL CENTERS IN SUBMARKETS
POTOMAC YARD STUDY AREA
OCTOBER 2008

ROSSLYN-BALLSTON CORRIDOR					
MAP KEY	SHOPPING CENTERS	ANCHOR TENANTS	SQUARE FOOTAGE	YEAR FIRST OPENED	TYPE
1	Ballston Common Mall	Hecht's Department Store, Regal Cinemas	580,000	1986	Regional
2	2900 Clarendon	Gold's Gym	86,000	N/A	Neighborhood
3	Clarendon Market Commons	Barnes & Noble, Container Store, Crate & Barrel, Eastern Mountain Sports, Whole Foods Market	400,000	2002	Regional
4	Clarendon Center	Undetermined	42,000+	Proposed	Neighborhood

PENTAGON CITY AND CRYSTAL CITY					
MAP KEY	SHOPPING CENTERS	ANCHOR TENANTS	SQUARE FOOTAGE	YEAR FIRST OPENED	TYPE
5	Pentagon Row	Bally's Total Fitness, Bed, Bath, and Beyond, Cost Plus World Market, DSW Shoe Warehouse, Eckerd Drug, Harris Teeter	295,689	2000	Community
6	The Fashion Centre at Pentagon City	Macy's, Nordstrom Department Store	821,686	1989	Super Regional
7	Pentagon Centre	Best Buy, Borders Books & Music, Costco Wholesale, Linens 'N Things, Marshalls	337,429	1994	Regional
8	Crystal City Shops	No big box anchor tenant	289,235	1975	Community

POTOMAC YARD, EISENHOWER, AND OLD TOWN ALEXANDRIA					
MAP KEY	SHOPPING CENTERS	ANCHOR TENANTS	SQUARE FOOTAGE	YEAR FIRST OPENED	TYPE
9	Potomac Yard Center	Best Buy, Hoyts Cinema, Shopper's Food Warehouse, Sports Authority, Target, T.J. Maxx	589,856	1997	Regional
10	Summit Center	T.G.I. Friday's, US Army Cop. of Engineers	114,000	1985	Community
11	Alexandria Commons Shopping Center	Giant Food, Mastercraft	146,473	1990	Community
12	King Street Station	Prims Gourmet	150,000	1995	Community

Exhibit 8

**DETAIL OF COMPETITIVE RETAIL CENTERS IN SUBMARKETS
POTOMAC YARD STUDY AREA
OCTOBER 2008**

SHIRLINGTON AND FAIRLINGTON					
MAP KEY	SHOPPING CENTERS	ANCHOR TENANTS	SQUARE FOOTAGE	YEAR FIRST OPENED	TYPE
13	Shirley Park Shopping Center	Giant Food, Rinaldi Bowling Alley, Rite Aid	156,619	N/A	Community
14	The Village at Shirlington	Cineplex Odeon	203,561	1944	Community
15	Bradlee Shopping Center	Giant Food, Health Club	179,307	N/A	Community

VAN DORN					
MAP KEY	SHOPPING CENTERS	ANCHOR TENANTS	SQUARE FOOTAGE	YEAR FIRST OPENED	TYPE
16	Foxchase Shopping Center	Harris Teeter, Rite Aid Pharmacy	140,240	1960	Community
17	Plaza at Landmark	Bally's Total Fitness, Marshalls, Ross Dress for Less, Shopper's Food Warehouse	443,058	1965	Regional
18	Landmark Mall	Hecht's Department Store, Lord & Taylor, Sears	969,989	1965	Regional
19	Van Dorn Plaza	CVS, Safeway	119,229	1979	Community
20	Van Dorn Center	Giant Food	75,000	N/A	Neighborhood

BAILEYS CROSSROADS					
MAP KEY	SHOPPING CENTERS	ANCHOR TENANTS	SQUARE FOOTAGE	YEAR FIRST OPENED	TYPE
21	Baileys Crossroads Shopping Center	Best Buy, K&G Menswear, Office Depot, Petco, Pier 1 Imports, Trader Joe's	395,199	1994	Regional
22	Leesburg Pike Plaza	No big box anchor tenant	97,888	1965	Neighborhood

Exhibit 8

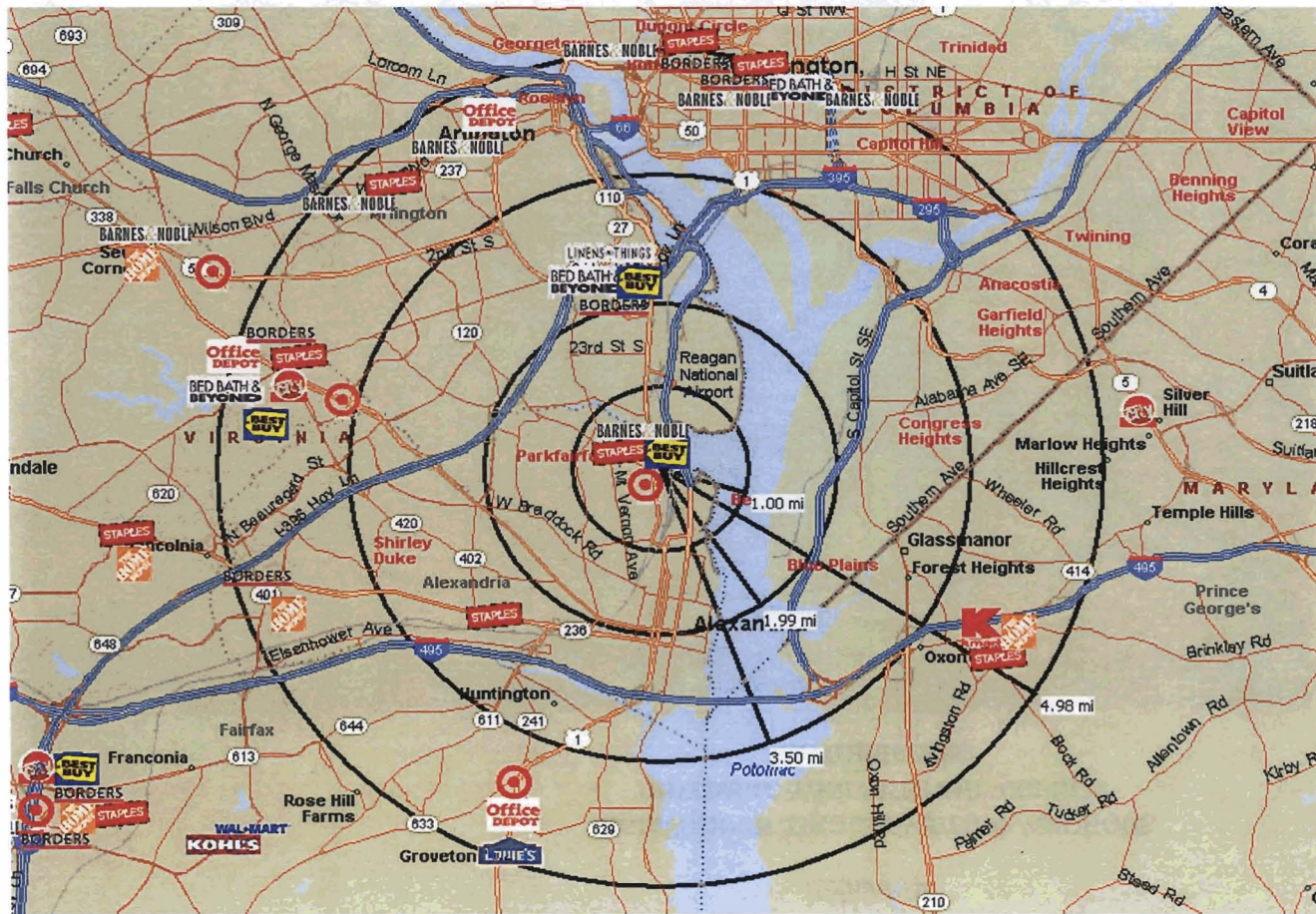
**DETAIL OF COMPETITIVE RETAIL CENTERS IN SUBMARKETS
POTOMAC YARD STUDY AREA
OCTOBER 2008**

NATIONAL HARBOR AND OXON HILL, MD					
MAP KEY	SHOPPING CENTERS	ANCHOR TENANTS	SQUARE FOOTAGE¹	YEAR FIRST OPENED	TYPE
23	Eastover Shopping Center	Giant Food	348,899	1955	Regional
24	Oxon Hill Plaza	A.J. Wright, Shopper's Food Warehouse	143,468	1966	Community
25	Rivertowne Commons	AMC Theatres, Big Kmart, CVS, Old Navy Clothing Co., Safeway, Staples Office Supply	380,000	1986	Regional
26	National Harbor	No big box anchor tenant	1,000,000	2008	Super Regional
DISTRICT OF COLUMBIA					
MAP KEY	SHOPPING CENTERS	ANCHOR TENANTS	SQUARE FOOTAGE	YEAR FIRST OPENED	TYPE
27	Waterfront	CVS, Safeway	100,000	1973	Community
28	The Old Post Office Pavilion	No big box anchor tenant	101,140	1983	Community

¹ Square footage at National Harbor reflects total planned retail space.
SOURCE: CoStar/NRB 2006 Shopping Center Directory; RCLCO

Exhibit 9

LOCATION OF KEY RETAIL ANCHORS
POTOMAC YARD SITE AND VICINITY
OCTOBER 2008

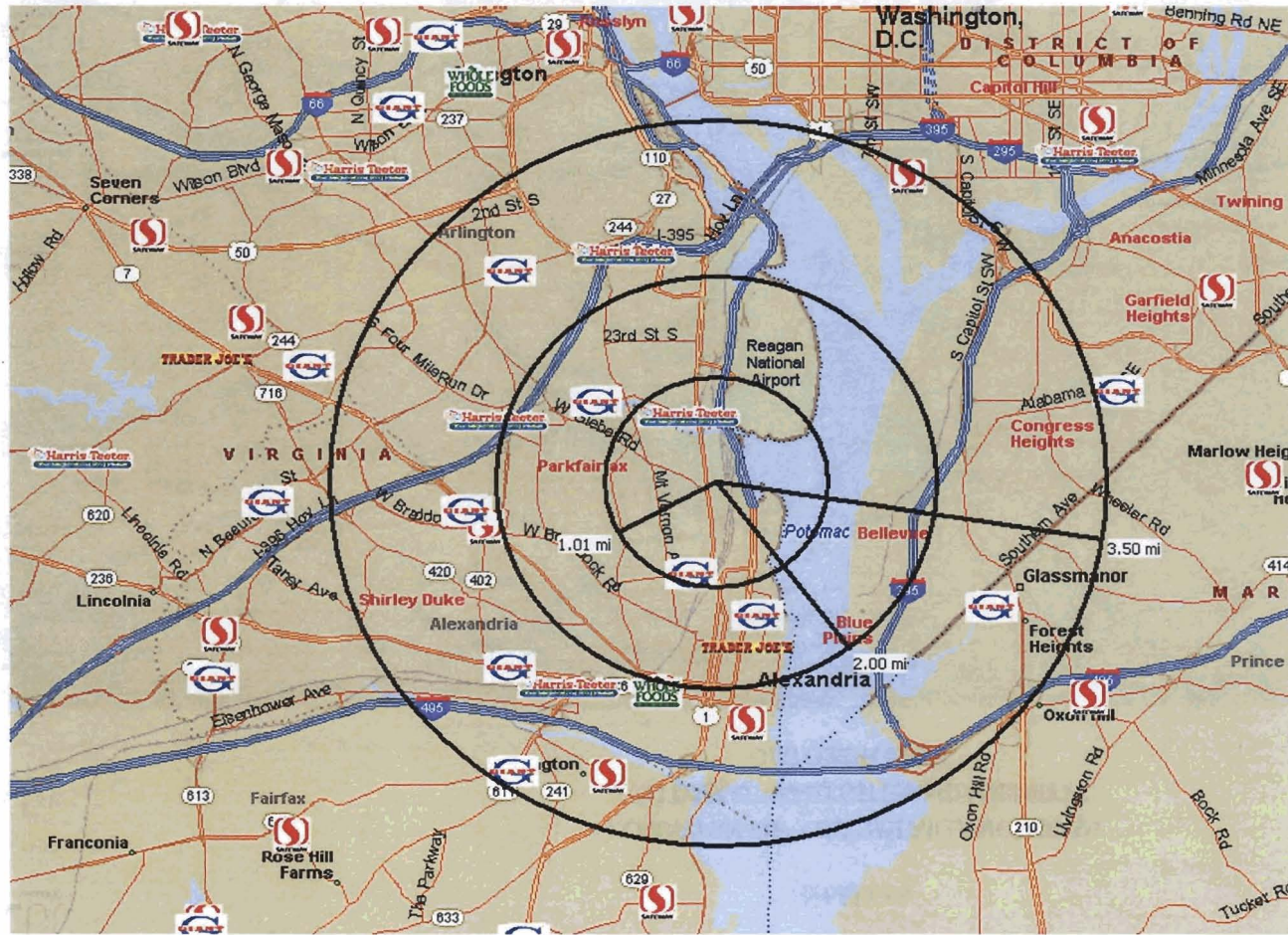


-  Walmart
-  Kohl's
-  Bed Bath & Beyond
-  Lowe's
-  Staples
-  Office Depot
-  Home Depot
-  Target
-  Best Buy
-  Circuit City
-  Barnes & Noble
-  Kmart
-  Borders/Waldenbooks
-  Linens 'n Things

SOURCE: RCLCO

Exhibit 10

LOCATION OF GROCERY STORE ANCHORS
 POTOMAC YARD SITE AND VICINITY
 OCTOBER 2008



-  Whole Foods Market
-  Trader Joe's
-  Harris Teeter
-  Safeway
-  Giant

SOURCE: RCLCO

Exhibit 11

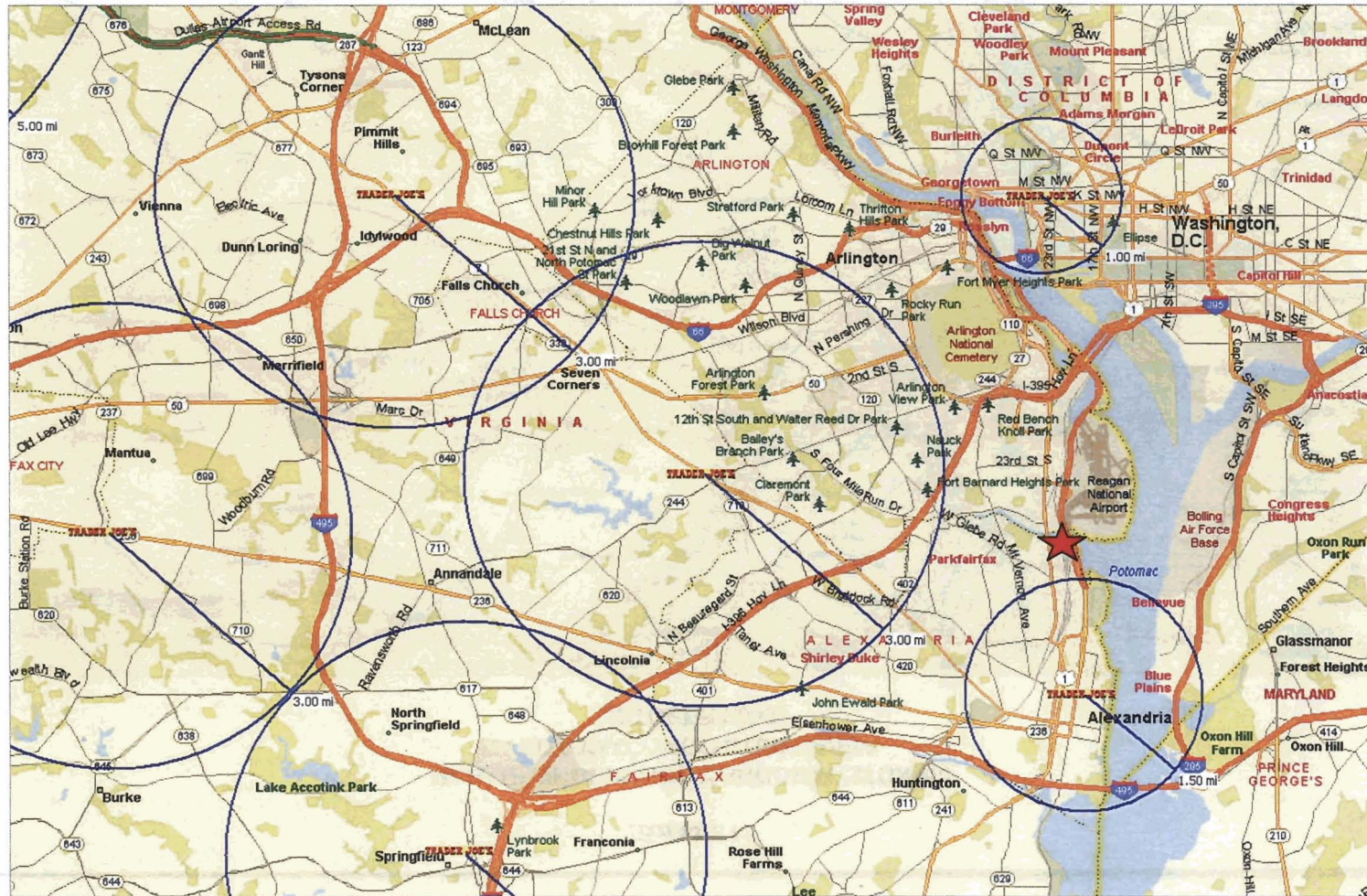
MAP OF WHOLE FOODS GROCERY STORES
POTOMAC YARD STUDY AREA
OCTOBER 2008



SOURCE: RCLCO

Exhibit 12

MAP OF TRADER JOES GROCERY STORES
POTOMAC YARD STUDY AREA
OCTOBER 2008



SOURCE: RCLCO

Exhibit 13

MAP OF HARRIS TEETER GROCERY STORES
POTOMAC YARD STUDY AREA
OCTOBER 2008



SOURCE: RCLCO

Exhibit 14

MAP OF SAFEWAY GROCERY STORES
POTOMAC YARD STUDY AREA
OCTOBER 2008



SOURCE: RCLCO

Exhibit 15

MAP OF GIANT GROCERY STORES
POTOMAC YARD STUDY AREA
OCTOBER 2008



SOURCE: RCLCO

Exhibit 16

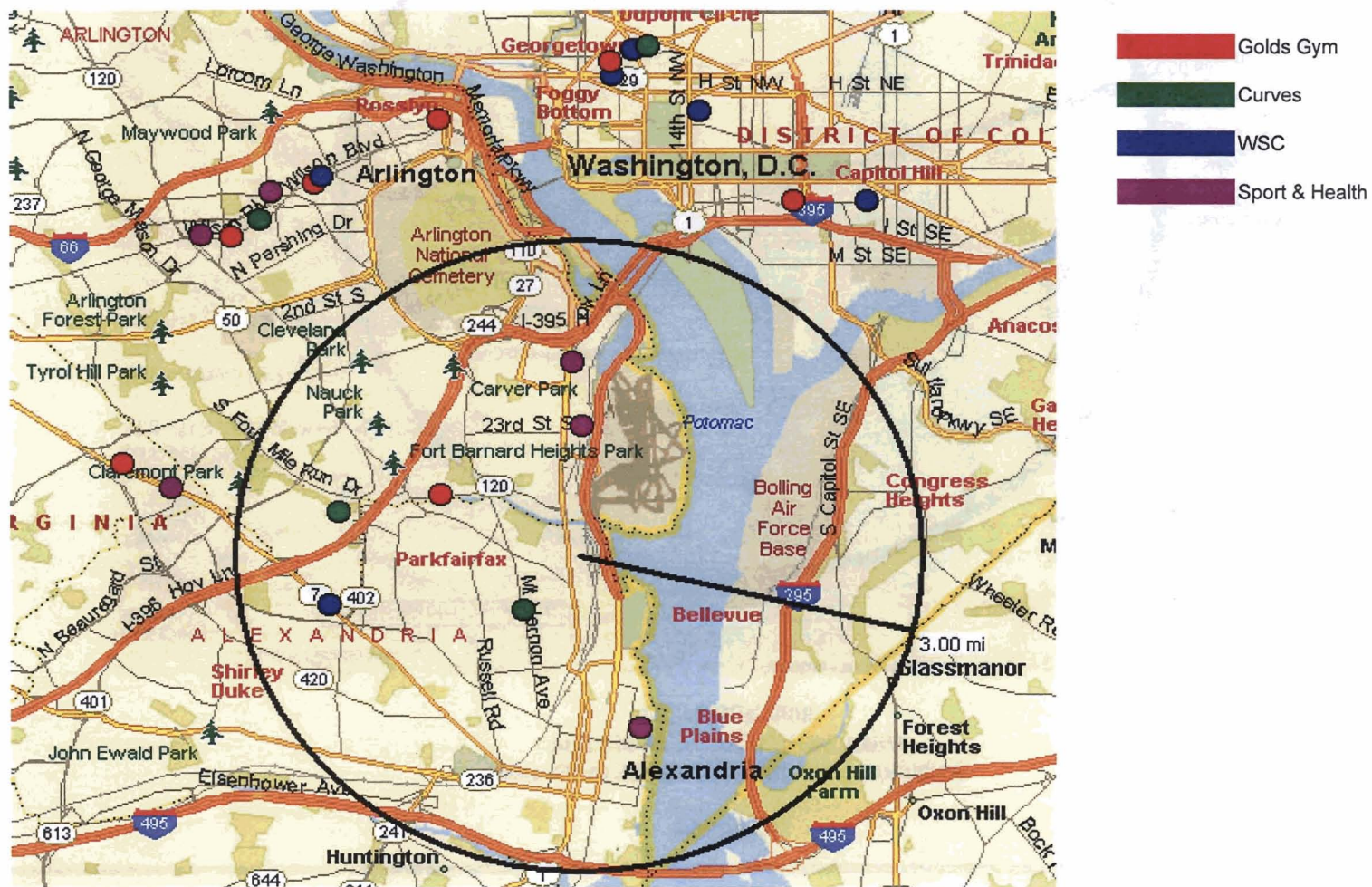
MAP OF WEGMANS GROCERY STORES
POTOMAC YARD STUDY AREA
OCTOBER 2008



SOURCE: RCLCO

Exhibit 17

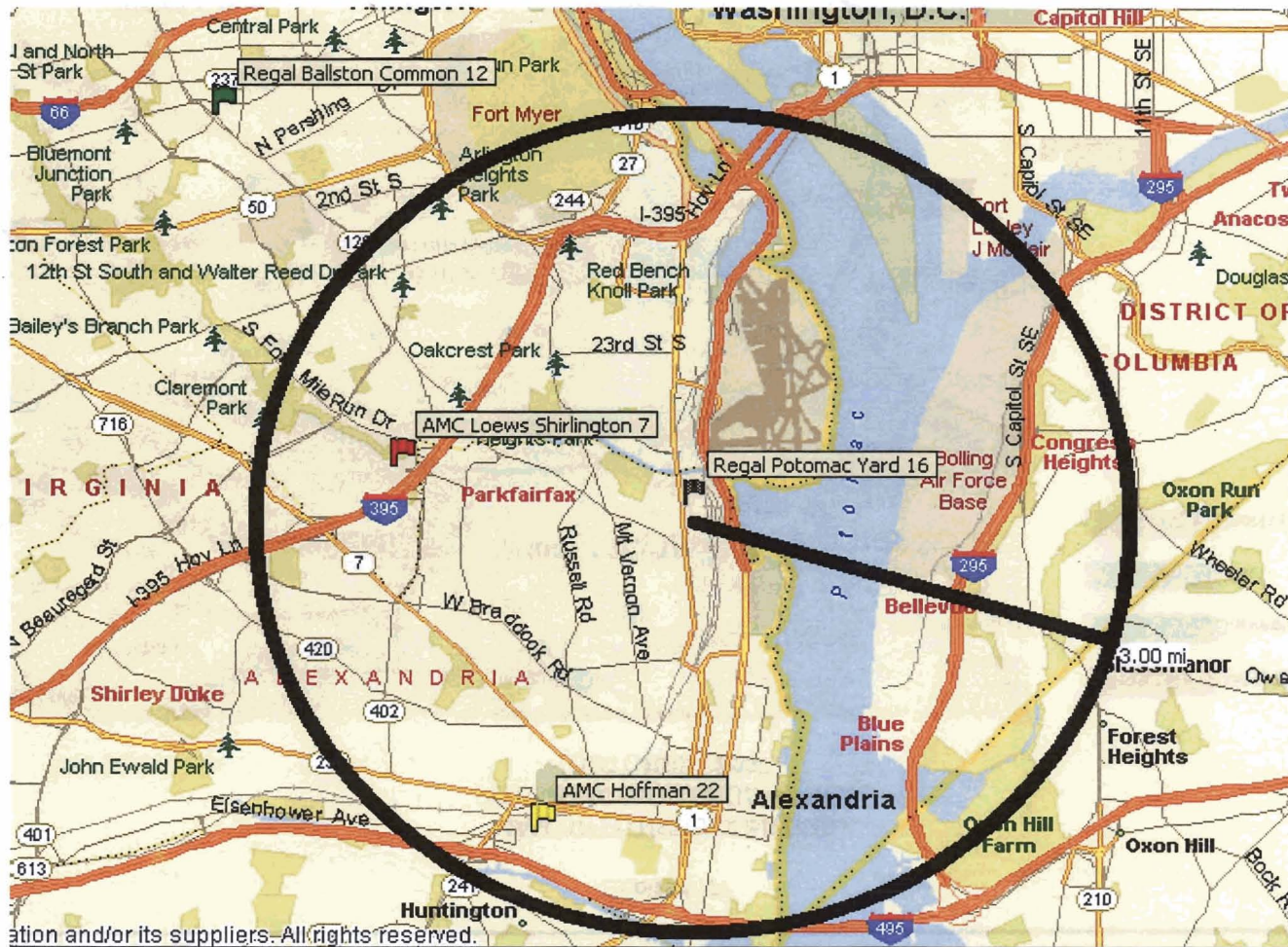
MAP OF FITNESS CENTERS
 POTOMAC YARD STUDY AREA
 OCTOBER 2008



SOURCE: RCLCO

Exhibit 18

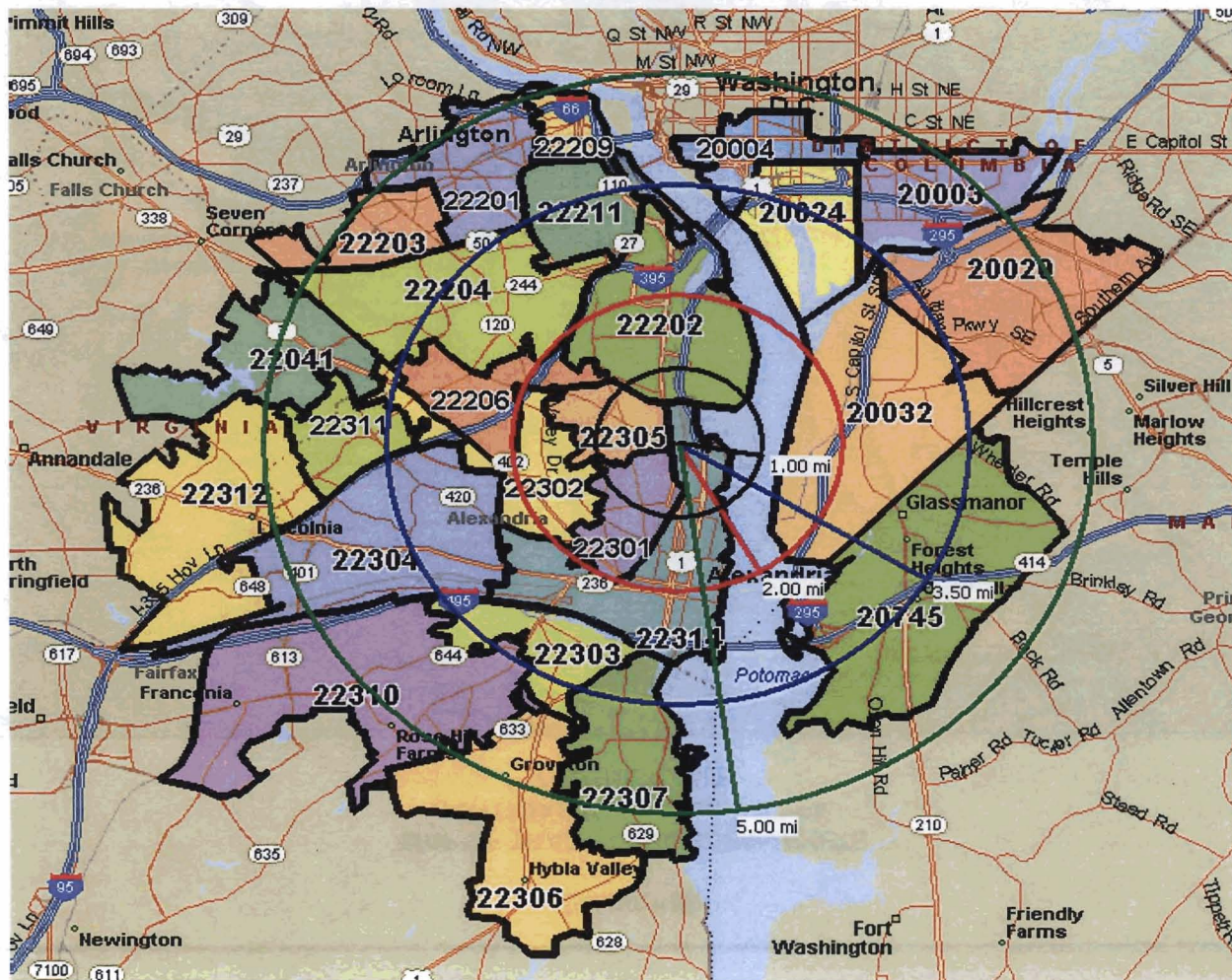
MAP OF COMPETITIVE MOVIE THEATERS
POTOMAC YARD STUDY AREA
OCTOBER 2008



SOURCE: RCLCO

Exhibit 19A

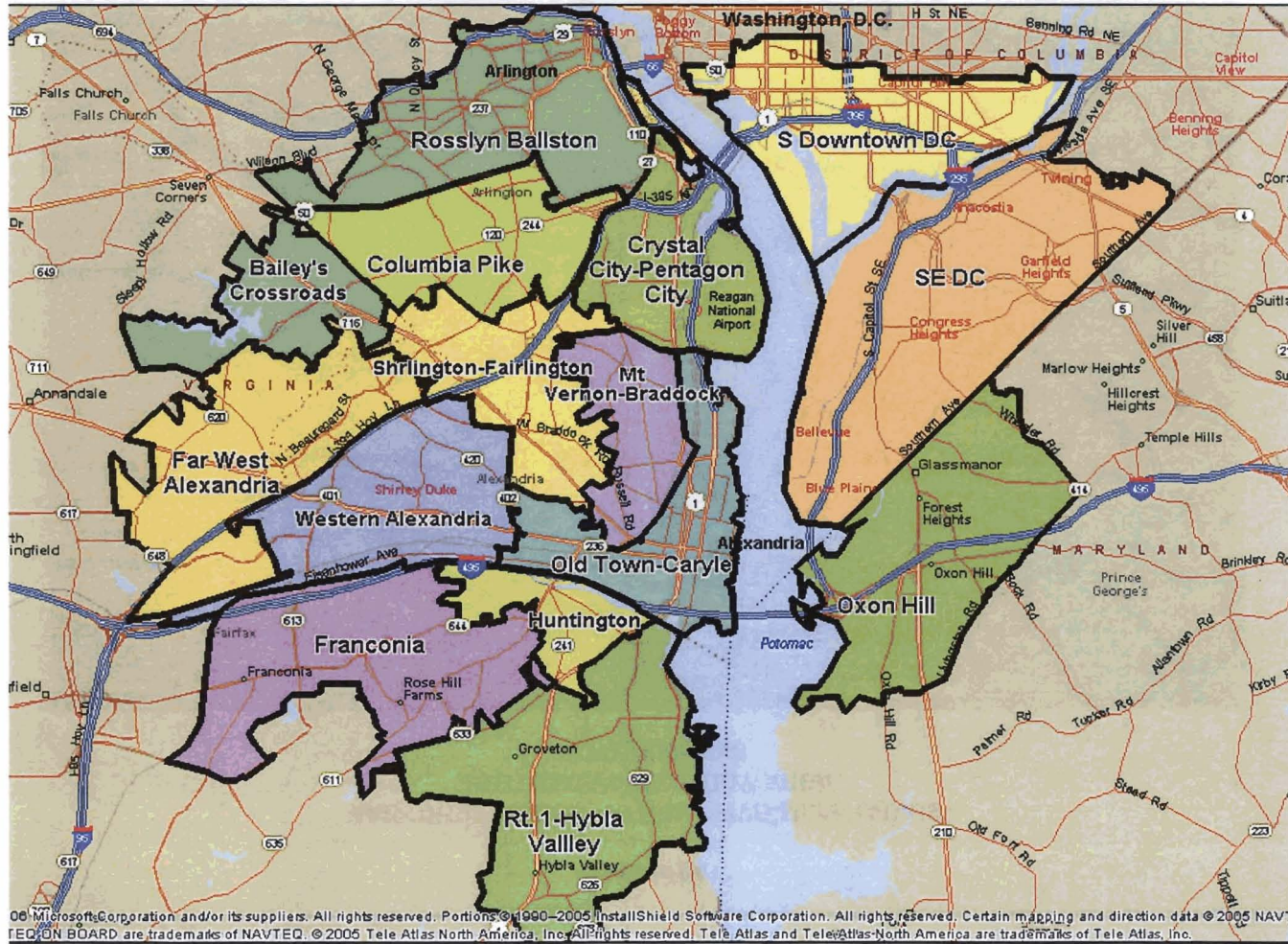
MAP OF ZIP CODES WITHIN A FIVE-MILE RADIUS
POTOMAC YARD STUDY AREA
OCTOBER 2008



SOURCE: RCLCO

Exhibit 19B

MAP OF TRADE AREA SUBMARKETS
POTOMAC YARD STUDY AREA
OCTOBER 2008



SOURCE: RCLCO

Exhibit 20

DEMOGRAPHIC DATA FOR SELECT ZIP CODE MARKET AREAS
POTOMAC YARD STUDY AREA
OCTOBER 2008

Place/ Zip Code	Claritas Estimates			Equivalent TAZ Districts 1/				
	2008 HHs	2013 HHs	Avg. HH Inc., 2008	2005 HHs	2010 HHs	2020 HHs	% Change, 2008	% Change, 2013
Alexandria	63,965	65,055	\$104,888	66,337	70,319	78,306	7%	12%
Arlington	88,506	89,575	\$112,146	92,226	103,038	114,261	12%	19%
Mount Vernon/Braddock	11,055	10,997	\$113,538	11,131	11,363	12,096	2%	5%
22301	4,643	4,422	\$138,873	4,696	4,728	5,016	2%	9%
22305	6,412	6,575	\$95,193	6,435	6,635	7,080	2%	3%
Crystal City/Pentagon City								
22202	11,281	11,826	\$106,964	13,152	16,161	19,212	33%	44%
Old Town/Carlyle								
22314	14,397	14,909	\$138,259	14,827	17,497	21,612	14%	26%
Western Alexandria								
22304	21,220	21,897	\$86,003	21,523	21,986	25,008	3%	5%
Shirlington/Fairlington								
22302	16,349	16,370	\$106,811	19,080	20,445	20,776	22%	25%
22302	7,696	7,551	\$116,210	8,783	9,203	9,278	17%	22%
22206	8,653	8,819	\$98,452	10,297	11,242	11,498	26%	28%
Columbia Pike								
22204	19,228	18,934	\$80,689	16,971	18,622	20,872	-7%	2%
Rosslyn-Ballston								
22211	32,165	33,510	\$107,397	32,595	37,158	42,667	10%	16%
22209	421	576	\$91,918	1,580	1,470	1,592	260%	162%
22201	6,909	7,009	\$95,256	5,174	6,284	7,500	-15%	-5%
22203	15,537	16,395	\$116,074	14,781	17,262	19,570	5%	10%
22203	9,298	9,530	\$102,621	11,060	12,142	14,005	26%	33%
Far Western Alexandria								
22312	18,240	18,392	\$86,439	16,090	16,359	16,769	-11%	-10%
22311	10,020	10,010	\$93,034	8,874	9,116	9,484	-10%	-8%
22311	8,220	8,382	\$78,400	7,216	7,243	7,285	-12%	-13%
Bailey's Crossroads								
22041	9,965	10,204	\$87,756	11,212	11,368	12,490	13%	15%
Franconia								
22310	10,414	10,826	\$113,207	11,198	11,624	12,290	10%	9%
Huntington								
22303	6,549	6,790	\$82,205	8,014	8,955	9,369	31%	34%

Exhibit 20

**DEMOGRAPHIC DATA FOR SELECT ZIP CODE MARKET AREAS
POTOMAC YARD STUDY AREA
OCTOBER 2008**

Place/ Zip Code	Claritas Estimates			Equivalent TAZ Districts 1/				
	2008 HHs	2013 HHs	Avg. HH Inc., 2008	2005 HHs	2010 HHs	2020 HHs	% Change, 2008	% Change, 2013
Route 1/ Hybla Valley	15,358	15,410	\$92,341	14,280	15,229	18,040	-3%	4%
22307	4,279	4,153	\$121,656	3,713	3,807	4,937	-12%	0%
22306	11,079	11,257	\$81,019	10,567	11,422	13,103	0%	6%
Oxon Hill								
20745	10,646	10,543	\$64,338	11,668	12,099	14,312	12%	21%
SE Washington, DC	32,793	33,184	\$47,768	33,565	34,587	37,983	4%	7%
20032	12,810	12,738	\$48,337	13,259	13,573	14,585	5%	9%
20020	19,983	20,446	\$47,403	20,306	21,014	23,398	4%	6%
Southern Downtown DC	19,406	20,118	\$83,454	21,154	24,432	31,333	19%	32%
20024	7,360	7,616	\$59,299	7,027	8,145	9,951	5%	14%
20003	10,702	10,792	\$96,673	12,501	14,459	19,386	28%	48%
20004	1,344	1,710	\$110,469	1,626	1,828	1,996	30%	10%

1/ RCLCO used best fit TAZ districts to match zip code market areas; in areas where an especially substantial part of a TAZ district extended outside of a market area, and assumed adjustment to households was made based upon the likely share of the TAZ district area that was outside the zip code area.

SOURCE: RCLCO; Iexpress/Claritas, Inc.; MWCOG, Round 7.1 Cooperative Forecasts

Exhibit 21

HOUSEHOLD RETAIL EXPENDITURES AND DEMAND-SUPPLY GAP ANALYSIS
CITY OF ALEXANDRIA, ARLINGTON COUNTY, AND MARKET AREAS
OCTOBER 2008

City of Alexandria, VA Retail Categories	Claritas Estimates				MWCOG HH Estimates			
	2008 Expenditures	2008 Avg. HH Expenditures	2008 Retail Sales Estimates	2008 Demand-Supply Gap	2008 Expenditures	2008 Demand-Supply Gap	2020 Expenditures	2020 Demand-Supply Gap
Major Comparison Retailers	\$495,632,880	\$7,749	\$768,282,494	(\$272,649,614)	\$532,525,044	(\$235,757,450)	\$606,754,136	(\$161,528,358)
Department Stores Excluding Leased Departments-4521	\$185,954,458	\$2,907	\$296,198,000	(\$110,243,542)	\$199,795,877	(\$96,402,123)	\$227,645,584	(\$68,552,416)
Radio, Television, Electronics Stores-443112	\$46,349,702	\$725	\$59,482,995	(\$13,133,293)	\$49,799,717	(\$9,683,278)	\$56,741,339	(\$2,741,656)
Household Appliances Stores-443111	\$11,038,468	\$173	\$13,197,515	(\$2,159,047)	\$11,860,110	(\$1,337,405)	\$13,513,301	\$315,786
Computer and Software Stores-44312	\$17,360,922	\$271	\$33,792,005	(\$16,431,083)	\$18,653,173	(\$15,138,832)	\$21,253,253	(\$12,538,752)
Office Supplies, Stationery Stores-45321	\$19,227,608	\$301	\$4,296,997	\$14,930,611	\$20,658,805	\$16,361,808	\$19,241,455	\$19,241,455
Home Furnishing Stores-4422	\$35,792,708	\$560	\$115,130,973	(\$79,338,265)	\$38,456,919	(\$76,674,054)	\$43,817,459	(\$71,313,514)
Furniture Stores-4421	\$48,099,162	\$752	\$124,025,002	(\$75,925,840)	\$51,679,397	(\$72,345,605)	\$58,883,029	(\$65,141,973)
Home Centers-44411	\$95,522,108	\$1,493	\$83,854,001	\$11,668,107	\$110,632,244	\$18,778,243	\$116,938,235	\$33,084,234
Sporting Goods Stores-45111	\$22,975,389	\$359	\$23,393,008	(\$417,619)	\$24,685,550	\$1,292,542	\$28,126,488	\$4,733,480
Book Stores-451211	\$13,312,355	\$208	\$14,911,998	(\$1,599,643)	\$14,303,253	(\$608,745)	\$16,296,995	\$1,384,997
In-Line Comparison Retailers	\$202,855,151	\$3,171	\$194,706,985	\$8,148,166	\$217,954,564	\$23,247,579	\$248,335,425	\$53,628,440
Clothing Stores-4481	\$116,794,194	\$1,826	\$124,903,989	(\$8,109,795)	\$125,487,706	\$583,717	\$142,979,538	\$18,075,549
Shoe Stores-4482	\$19,473,258	\$304	\$23,940,998	(\$4,467,740)	\$20,922,739	(\$3,018,259)	\$23,839,177	(\$101,821)
Jewelry Stores-44831	\$30,601,207	\$478	\$26,615,997	\$3,985,210	\$32,878,991	\$6,262,994	\$37,462,020	\$10,846,023
Luggage and Leather Goods Stores-44832	\$2,168,467	\$34	\$920,000	\$1,248,467	\$2,329,876	\$1,409,876	\$2,654,639	\$1,734,639
Camera and Photographic Equipment Stores-44313	\$3,127,300	\$49	\$5,442,998	(\$2,315,698)	\$3,360,079	(\$2,082,919)	\$3,828,443	(\$1,614,555)
Cosmetics, Beauty Supplies, Perfume Stores-44612	\$5,210,817	\$81	\$1,886,000	\$3,324,817	\$5,598,681	\$3,712,681	\$6,379,086	\$4,493,086
Hobby, Toys & Games Stores-45112	\$13,021,319	\$204	\$3,774,002	\$9,247,317	\$13,990,554	\$10,216,552	\$15,940,708	\$12,166,706
Sew/Needlework/Piece Goods Stores-45113	\$2,861,587	\$45	\$730,000	\$2,131,587	\$3,074,588	\$2,344,588	\$3,503,157	\$2,773,157
Musical Instrument and Supplies Stores-45114	\$4,036,727	\$63	\$739,000	\$3,297,727	\$4,337,199	\$3,598,199	\$4,941,764	\$4,202,764
Prerecorded Tapes, CDs, Record Stores-45122	\$5,560,275	\$87	\$5,754,001	(\$193,726)	\$5,974,151	\$220,150	\$6,806,893	\$1,052,892
Food & Beverage	\$308,321,230	\$4,820	\$340,585,002	(\$32,263,772)	\$331,270,953	(\$9,314,049)	\$377,447,076	\$36,862,074
Full-Service Restaurants-7221	\$155,722,447	\$2,434	\$236,535,992	(\$80,813,545)	\$167,313,563	(\$69,222,429)	\$190,635,534	(\$45,900,458)
Limited Service Eating Places-7222	\$134,409,047	\$2,101	\$104,049,010	\$30,360,037	\$144,413,711	\$40,364,701	\$164,543,654	\$60,494,644
Drinking Places Alcoholic Beverages-7224	\$18,189,736	\$284	\$0	\$18,189,736	\$19,543,679	\$19,543,679	\$22,267,888	\$22,267,888
Neighborhood Retailers	\$552,199,755	\$8,633	\$580,463,981	(\$28,264,226)	\$593,302,444	\$12,838,463	\$676,003,346	\$95,539,365
Supermarket, Grocery -44511	\$277,264,788	\$4,335	\$322,963,988	(\$45,699,200)	\$297,902,842	(\$25,061,146)	\$339,427,757	\$16,463,769
Pharmacies and Drug Stores-44611	\$130,802,100	\$2,045	\$116,872,013	\$13,930,087	\$140,538,283	\$23,666,270	\$160,128,027	\$43,256,014
Convenience Stores-44512	\$14,616,563	\$229	\$28,658,005	(\$14,041,442)	\$15,704,539	(\$12,953,466)	\$17,893,607	(\$10,764,398)
Specialty Food Stores-4452	\$9,121,507	\$143	\$14,790,001	(\$5,668,494)	\$9,800,461	(\$4,989,540)	\$11,166,556	(\$3,623,445)
Beer, Wine and Liquor Stores-4453	\$24,645,130	\$385	\$15,003,000	\$9,642,130	\$26,479,577	\$11,476,577	\$30,170,586	\$15,167,586
Optical Goods Stores-44613	\$5,665,042	\$89	\$34,253,000	(\$28,587,958)	\$6,086,716	(\$28,166,284)	\$6,935,149	(\$27,317,851)
Other Health and Personal Care Stores-44619	\$9,093,737	\$142	\$9,869,997	(\$776,260)	\$9,770,624	(\$99,373)	\$11,132,560	\$1,262,563
Paint and Wallpaper Stores-44412	\$5,984,755	\$94	\$3,924,003	\$2,060,752	\$6,430,227	\$2,506,224	\$7,326,541	\$3,402,538
Hardware Stores-44413	\$20,811,570	\$325	\$0	\$20,811,570	\$22,360,668	\$22,360,668	\$25,477,539	\$25,477,539
Florists-4531	\$5,583,510	\$87	\$8,202,000	(\$2,618,490)	\$5,999,116	(\$2,202,884)	\$6,835,337	(\$1,366,663)
Other Miscellaneous Store Retailers-4539	\$33,995,034	\$531	\$14,539,974	\$19,455,060	\$36,525,436	\$21,985,462	\$41,616,746	\$27,076,772
Gift, Novelty and Souvenir Stores-45322	\$14,616,019	\$229	\$11,388,000	\$3,228,019	\$15,703,954	\$4,315,954	\$17,892,941	\$6,504,941
TOTALS	\$1,559,009,016	\$24,373	\$1,884,038,462	(\$325,029,446)	\$1,675,053,005	(\$208,985,457)	\$1,908,539,983	\$24,501,521

SOURCE: RCLCO; Iexpress/Claritas, Inc.; MWCOG, Round 7.1 Cooperative Forecasts

Exhibit 21

HOUSEHOLD RETAIL EXPENDITURES AND DEMAND-SUPPLY GAP ANALYSIS
CITY OF ALEXANDRIA, ARLINGTON COUNTY, AND MARKET AREAS
SEPTEMBER 2008

Arlington County, VA	Claritas Estimates				MWCOG HH Estimates			
	Retail Categories	2008 Expenditures	2008 Avg. HH Expenditures	2008 Retail Sales Estimates	2008 Demand-Supply Gap	2008 Expenditures	2008 Demand-Supply Gap	2020 Expenditures
Major Comparison Retailers	\$739,449,857	\$8,355	\$591,173,007	\$148,276,850	\$824,728,963	\$233,555,956	\$954,627,710	\$363,454,703
Department Stores Excluding Leased Departments-4521	\$276,524,440	\$3,124	\$330,659,996	(\$54,135,556)	\$308,415,388	(\$22,244,608)	\$356,992,283	\$26,332,287
Radio, Television, Electronics Stores-443112	\$68,646,472	\$776	\$69,122,985	(\$476,513)	\$76,563,317	\$7,440,332	\$88,622,405	\$19,499,420
Household Appliances Stores-443111	\$16,160,502	\$183	\$5,656,002	\$10,504,500	\$18,024,257	\$12,368,255	\$20,863,163	\$15,207,161
Computer and Software Stores-44312	\$25,800,881	\$292	\$17,008,002	\$8,792,879	\$28,776,439	\$11,768,437	\$33,308,866	\$16,300,864
Office Supplies, Stationery Stores-45321	\$28,867,495	\$326	\$19,710,001	\$9,157,494	\$32,196,719	\$12,486,718	\$37,267,856	\$17,557,855
Home Furnishing Stores-4422	\$53,892,177	\$609	\$86,648,002	(\$32,755,825)	\$60,107,442	(\$26,540,560)	\$69,574,651	(\$17,073,351)
Furniture Stores-4421	\$72,252,876	\$816	\$27,269,009	\$44,983,867	\$80,585,639	\$53,316,630	\$93,278,262	\$66,009,253
Home Centers-44411	\$141,606,169	\$1,600	\$0	\$141,606,169	\$157,937,293	\$157,937,293	\$182,813,171	\$182,813,171
Sporting Goods Stores-45111	\$34,861,189	\$394	\$16,601,004	\$18,260,185	\$38,881,652	\$22,280,648	\$45,005,698	\$28,404,694
Book Stores-451211	\$20,837,656	\$235	\$18,498,006	\$2,339,650	\$23,240,816	\$4,742,810	\$26,901,356	\$8,403,350
In-Line Comparison Retailers	\$304,367,355	\$3,439	\$526,302,000	(\$221,934,645)	\$339,469,365	(\$186,832,635)	\$392,937,409	(\$133,364,591)
Clothing Stores-4481	\$175,597,298	\$1,984	\$395,686,982	(\$220,089,684)	\$195,848,544	(\$199,838,438)	\$226,695,624	(\$168,991,358)
Shoe Stores-4482	\$29,109,109	\$329	\$55,328,005	(\$26,218,896)	\$32,466,198	(\$22,861,807)	\$37,579,779	(\$17,748,226)
Jewelry Stores-44831	\$46,668,876	\$527	\$46,927,012	(\$258,136)	\$52,051,094	\$5,124,082	\$60,249,389	\$13,322,377
Luggage and Leather Goods Stores-44832	\$3,275,937	\$37	\$807,998	\$2,467,939	\$3,653,744	\$2,845,746	\$4,229,226	\$3,421,228
Camera and Photographic Equipment Stores-44313	\$4,621,824	\$52	\$1,549,006	\$3,072,818	\$5,154,849	\$3,605,843	\$5,966,762	\$4,417,756
Cosmetics, Beauty Supplies, Perfume Stores-44612	\$7,496,566	\$85	\$12,794,994	(\$5,298,428)	\$8,361,128	(\$4,433,866)	\$9,678,046	(\$3,116,948)
Hobby, Toys & Games Stores-45112	\$19,237,534	\$217	\$6,783,002	\$12,454,532	\$21,456,156	\$14,673,154	\$24,835,603	\$18,052,601
Sew/Needlework/Piece Goods Stores-45113	\$4,229,689	\$48	\$829,998	\$3,399,691	\$4,717,490	\$3,887,492	\$5,460,517	\$4,630,519
Musical Instrument and Supplies Stores-45114	\$6,015,025	\$68	\$2,534,003	\$3,481,022	\$6,708,724	\$4,174,721	\$7,765,381	\$5,231,378
Prerecorded Tapes, CDs, Record Stores-45122	\$8,115,497	\$92	\$3,061,000	\$5,054,497	\$9,051,439	\$5,990,439	\$10,477,084	\$7,416,084
Food & Beverage	\$454,312,385	\$5,133	\$534,931,992	(\$80,619,607)	\$506,707,221	(\$28,224,771)	\$586,516,026	\$51,584,034
Full-Service Restaurants-7221	\$229,512,286	\$2,593	\$305,253,002	(\$75,740,716)	\$255,981,427	(\$49,271,575)	\$296,299,723	(\$8,953,279)
Limited Service Eating Places-7222	\$197,873,246	\$2,236	\$216,713,990	(\$18,840,744)	\$220,693,527	\$3,979,537	\$255,453,811	\$38,739,821
Drinking Places Alcoholic Beverages-7224	\$26,926,853	\$304	\$12,965,000	\$13,961,853	\$30,032,267	\$17,067,267	\$34,762,492	\$21,797,492
Neighborhood Retailers	\$804,229,336	\$9,087	\$940,118,962	(\$135,889,626)	\$896,979,315	(\$43,139,647)	\$1,038,257,837	\$98,138,875
Supermarket, Grocery -44511	\$403,362,509	\$4,557	\$523,196,963	(\$119,834,454)	\$449,881,409	(\$73,315,554)	\$520,739,878	(\$2,457,085)
Pharmacies and Drug Stores-44611	\$188,563,041	\$2,131	\$158,786,007	\$29,777,034	\$210,309,597	\$51,523,590	\$243,434,362	\$84,648,355
Convenience Stores-44512	\$21,137,116	\$239	\$61,015,984	(\$39,878,868)	\$23,574,813	(\$37,441,171)	\$27,287,958	(\$33,728,026)
Specialty Food Stores-4452	\$13,291,982	\$150	\$17,948,008	(\$4,656,026)	\$14,824,917	(\$3,123,091)	\$17,159,912	(\$788,096)
Beer, Wine and Liquor Stores-4453	\$36,231,914	\$409	\$25,053,996	\$11,177,918	\$40,410,460	\$15,356,464	\$46,775,300	\$21,721,304
Optical Goods Stores-44613	\$8,327,159	\$94	\$9,442,000	(\$1,114,841)	\$9,287,512	(\$154,488)	\$10,750,339	\$1,308,339
Other Health and Personal Care Stores-44619	\$13,073,800	\$148	\$3,117,004	\$9,956,796	\$14,581,572	\$11,464,568	\$16,878,239	\$13,761,235
Paint and Wallpaper Stores-44412	\$9,072,879	\$103	\$7,650,006	\$1,422,873	\$10,119,234	\$2,469,228	\$11,713,062	\$4,063,056
Hardware Stores-44413	\$30,739,624	\$347	\$25,431,997	\$5,307,627	\$34,284,756	\$8,852,759	\$39,684,769	\$14,252,772
Florists-4531	\$8,286,209	\$94	\$8,477,989	(\$191,780)	\$9,241,839	\$763,850	\$10,697,473	\$2,219,484
Other Miscellaneous Store Retailers-4539	\$50,134,096	\$566	\$30,158,007	\$19,976,089	\$55,915,950	\$25,757,943	\$64,722,979	\$34,564,972
Gift, Novelty and Souvenir Stores-45322	\$22,009,007	\$249	\$69,841,001	(\$47,831,994)	\$24,547,257	(\$45,293,744)	\$28,413,567	(\$41,427,434)
TOTALS	\$2,302,358,933	\$26,014	\$2,592,525,961	(\$290,167,028)	\$2,567,884,865	(\$24,641,096)	\$2,972,338,983	\$379,813,022

SOURCE: RCLCO; Iexpress/Claritas, Inc.; MWCOG, Round 7.1 Cooperative Forecasts

Exhibit 21

HOUSEHOLD RETAIL EXPENDITURES AND DEMAND-SUPPLY GAP ANALYSIS
CITY OF ALEXANDRIA, ARLINGTON COUNTY, AND MARKET AREAS
SEPTEMBER 2008

Mount Vernon/Braddock Retail Categories	Claritas Estimates				MWCOG HH Estimates			
	2008 Expenditures	2008 Avg. HH Expenditures	2008 Retail Sales Estimates	2008 Demand-Supply Gap	2008 Expenditures	2008 Demand-Supply Gap	2020 Expenditures	2020 Demand-Supply Gap
Major Comparison Retailers	\$95,043,809	\$8,597	\$166,896,040	(\$71,852,231)	\$96,893,961	(\$70,002,079)	\$103,993,660	(\$62,902,380)
Department Stores Excluding Leased Departments-4521	\$35,475,739	\$3,209	\$111,966,945	(\$76,491,206)	\$36,166,321	(\$75,800,624)	\$38,816,331	(\$73,150,614)
Radio, Television, Electronics Stores-443112	\$8,691,915	\$786	\$10,099,641	(\$1,407,726)	\$8,861,114	(\$1,238,527)	\$9,510,394	(\$589,247)
Household Appliances Stores-443111	\$2,093,874	\$189	\$2,376,950	(\$283,076)	\$2,134,634	(\$242,316)	\$2,291,045	(\$85,905)
Computer and Software Stores-44312	\$3,227,053	\$292	\$245,315	\$2,981,738	\$3,289,872	\$3,044,557	\$3,530,930	\$3,285,615
Office Supplies, Stationery Stores-45321	\$3,518,752	\$318	\$1,994,157	\$1,524,595	\$3,587,249	\$1,593,092	\$3,850,097	\$1,855,940
Home Furnishing Stores-4422	\$6,980,295	\$631	\$6,772,404	\$207,891	\$7,116,176	\$343,772	\$7,637,598	\$865,194
Furniture Stores-4421	\$9,130,500	\$826	\$21,383,691	(\$12,253,191)	\$9,308,237	(\$12,075,454)	\$9,990,278	(\$11,393,413)
Home Centers-44411	\$19,172,720	\$1,734	\$0	\$19,172,720	\$19,545,942	\$19,545,942	\$20,978,129	\$20,978,129
Sporting Goods Stores-45111	\$4,392,743	\$397	\$5,850,213	(\$1,457,470)	\$4,478,253	(\$1,371,960)	\$4,806,388	(\$1,043,825)
Book Stores-451211	\$2,360,218	\$213	\$6,206,724	(\$3,846,506)	\$2,406,163	(\$3,800,561)	\$2,582,469	(\$3,624,255)
In-Line Comparison Retailers	\$39,014,189	\$3,529	\$47,374,418	(\$8,360,229)	\$39,773,651	(\$7,600,767)	\$42,687,981	(\$4,686,437)
Clothing Stores-4481	\$22,697,048	\$2,053	\$40,570,604	(\$17,873,556)	\$23,138,876	(\$17,431,728)	\$24,834,328	(\$15,736,276)
Shoe Stores-4482	\$3,856,651	\$349	\$4,858,362	(\$1,001,711)	\$3,931,726	(\$926,636)	\$4,219,815	(\$638,547)
Jewelry Stores-44831	\$5,747,213	\$520	\$1,036,986	\$4,710,227	\$5,859,090	\$4,822,104	\$6,288,402	\$5,251,416
Luggage and Leather Goods Stores-44832	\$408,474	\$37	\$0	\$408,474	\$416,425	\$416,425	\$446,938	\$446,938
Camera and Photographic Equipment Stores-44313	\$585,958	\$53	\$0	\$585,958	\$597,364	\$597,364	\$641,135	\$641,135
Cosmetics, Beauty Supplies, Perfume Stores-44612	\$930,642	\$84	\$75,441	\$855,201	\$948,758	\$873,317	\$1,018,276	\$942,835
Hobby, Toys & Games Stores-45112	\$2,463,722	\$223	\$254,956	\$2,208,766	\$2,511,682	\$2,256,726	\$2,695,720	\$2,440,764
Sew/Needlework/Piece Goods Stores-45113	\$532,789	\$48	\$208,571	\$324,218	\$543,160	\$334,589	\$582,959	\$374,388
Musical Instrument and Supplies Stores-45114	\$766,951	\$69	\$369,498	\$397,453	\$781,881	\$412,383	\$839,171	\$469,673
Prerecorded Tapes, CDs, Record Stores-45122	\$1,024,741	\$93	\$0	\$1,024,741	\$1,044,689	\$1,044,689	\$1,121,236	\$1,121,236
Food & Beverage	\$55,897,207	\$5,056	\$65,427,628	(\$9,530,421)	\$56,985,319	(\$8,442,309)	\$61,160,797	(\$4,266,831)
Full-Service Restaurants-7221	\$28,208,416	\$2,552	\$46,718,828	(\$18,510,412)	\$28,757,530	(\$17,961,298)	\$30,864,677	(\$15,854,151)
Limited Service Eating Places-7222	\$24,443,924	\$2,211	\$18,708,800	\$5,735,124	\$24,919,757	\$6,210,957	\$26,745,699	\$8,036,899
Drinking Places Alcoholic Beverages-7224	\$3,244,867	\$294	\$0	\$3,244,867	\$3,308,033	\$3,308,033	\$3,550,422	\$3,550,422
Neighborhood Retailers	\$103,051,854	\$9,322	\$117,451,673	(\$14,399,819)	\$105,057,893	(\$12,393,780)	\$112,755,787	(\$4,695,886)
Supermarket, Grocery -44511	\$52,588,230	\$4,757	\$90,334,020	(\$37,745,790)	\$53,611,929	(\$36,722,091)	\$57,540,229	(\$32,793,791)
Pharmacies and Drug Stores-44611	\$23,520,715	\$2,128	\$7,496,413	\$16,024,302	\$23,978,576	\$16,482,163	\$25,735,556	\$18,239,143
Convenience Stores-44512	\$2,744,680	\$248	\$7,920,552	(\$5,175,872)	\$2,798,109	(\$5,122,443)	\$3,003,134	(\$4,917,418)
Specialty Food Stores-4452	\$1,745,369	\$158	\$1,643,334	\$102,035	\$1,779,345	\$136,011	\$1,909,723	\$266,389
Beer, Wine and Liquor Stores-4453	\$4,485,206	\$406	\$1,056,549	\$3,428,657	\$4,572,516	\$3,515,967	\$4,907,558	\$3,851,009
Optical Goods Stores-44613	\$1,062,799	\$96	\$0	\$1,062,799	\$1,083,488	\$1,083,488	\$1,162,878	\$1,162,878
Other Health and Personal Care Stores-44619	\$1,630,708	\$148	\$1,348,244	\$282,464	\$1,662,452	\$314,208	\$1,784,264	\$439,020
Paint and Wallpaper Stores-44412	\$1,199,150	\$108	\$1,207,384	(\$8,234)	\$1,222,493	\$15,109	\$1,312,069	\$104,685
Hardware Stores-44413	\$4,048,030	\$366	\$0	\$4,048,030	\$4,126,830	\$4,126,830	\$4,429,215	\$4,429,215
Florists-4531	\$1,045,949	\$95	\$2,812,119	(\$1,766,170)	\$1,066,310	(\$1,745,809)	\$1,144,441	(\$1,667,678)
Other Miscellaneous Store Retailers-4539	\$6,289,884	\$569	\$3,033,690	\$3,256,194	\$6,412,325	\$3,378,635	\$6,882,174	\$3,848,484
Gift, Novelty and Souvenir Stores-45322	\$2,691,134	\$243	\$599,368	\$2,091,766	\$2,743,520	\$2,144,152	\$2,944,546	\$2,345,178
TOTALS	\$293,007,059	\$26,504	\$397,149,759	(\$104,142,700)	\$298,710,824	(\$98,438,935)	\$320,598,226	(\$76,551,533)

SOURCE: RCLCO; Iexpress/Claritas, Inc.; MWCOG, Round 7.1 Cooperative Forecasts

Exhibit 21

HOUSEHOLD RETAIL EXPENDITURES AND DEMAND-SUPPLY GAP ANALYSIS
CITY OF ALEXANDRIA, ARLINGTON COUNTY, AND MARKET AREAS
SEPTEMBER 2008

Crystal City/Pentagon City Retail Categories	Claritas Estimates				MWCOG HH Estimates			
	2008 Expenditures	2008 Avg. HH Expenditures	2008 Retail Sales Estimates	2008 Demand-Supply Gap	2008 Expenditures	2008 Demand-Supply Gap	2020 Expenditures	2020 Demand-Supply Gap
Major Comparison Retailers	\$83,848,816	\$7,433	\$340,315,451	(\$256,466,635)	\$111,174,566	(\$229,140,885)	\$142,797,930	(\$197,517,521)
Department Stores Excluding Leased Departments-4521	\$32,392,160	\$2,871	\$247,527,212	(\$215,135,052)	\$42,948,541	(\$204,578,671)	\$55,165,161	(\$192,362,051)
Radio, Television, Electronics Stores-443112	\$8,300,047	\$736	\$51,191,734	(\$42,891,687)	\$11,004,975	(\$40,186,759)	\$14,135,316	(\$37,056,418)
Household Appliances Stores-443111	\$1,828,558	\$162	\$0	\$1,828,558	\$2,424,472	\$2,424,472	\$3,114,108	\$3,114,108
Computer and Software Stores-44312	\$3,188,332	\$283	\$2,325,147	\$863,185	\$4,227,387	\$1,902,240	\$5,429,859	\$3,104,712
Office Supplies, Stationery Stores-45321	\$3,568,468	\$316	\$4,067,143	(\$498,675)	\$4,731,407	\$664,264	\$6,077,246	\$2,010,103
Home Furnishing Stores-4422	\$5,884,787	\$522	\$20,224,476	(\$14,339,689)	\$7,802,598	(\$12,421,878)	\$10,022,031	(\$10,202,445)
Furniture Stores-4421	\$8,580,714	\$761	\$7,835,920	\$744,794	\$11,377,109	\$3,541,189	\$14,613,304	\$6,777,384
Home Centers-44411	\$13,372,709	\$1,185	\$0	\$13,372,709	\$17,730,783	\$17,730,783	\$22,774,265	\$22,774,265
Sporting Goods Stores-45111	\$4,158,625	\$369	\$3,074,260	\$1,084,365	\$5,513,892	\$2,439,632	\$7,082,307	\$4,008,047
Book Stores-451211	\$2,574,416	\$228	\$4,069,559	(\$1,495,143)	\$3,413,400	(\$656,159)	\$4,384,335	\$314,776
In-Line Comparison Retailers	\$35,767,636	\$3,171	\$396,482,672	(\$360,715,036)	\$47,424,062	(\$349,058,610)	\$60,913,733	(\$335,568,939)
Clothing Stores-4481	\$20,336,836	\$1,803	\$308,833,222	(\$288,496,386)	\$26,964,470	(\$281,868,752)	\$34,634,456	(\$274,198,766)
Shoe Stores-4482	\$3,270,471	\$290	\$43,449,673	(\$40,179,202)	\$4,336,295	(\$39,113,378)	\$5,569,745	(\$37,879,928)
Jewelry Stores-44831	\$5,781,977	\$513	\$28,948,476	(\$23,166,499)	\$7,666,283	(\$21,282,193)	\$9,846,941	(\$19,101,535)
Luggage and Leather Goods Stores-44832	\$404,343	\$36	\$680,420	(\$276,077)	\$536,116	(\$144,304)	\$688,613	\$8,193
Camera and Photographic Equipment Stores-44313	\$559,600	\$50	\$803,187	(\$243,587)	\$741,970	(\$61,217)	\$953,021	\$149,834
Cosmetics, Beauty Supplies, Perfume Stores-44612	\$949,137	\$84	\$10,929,060	(\$9,979,923)	\$1,258,454	(\$9,670,606)	\$1,616,419	(\$9,312,641)
Hobby, Toys & Games Stores-45112	\$2,241,189	\$199	\$1,719,632	\$521,557	\$2,971,577	\$1,251,945	\$3,816,836	\$2,097,204
Sew/Needlework/Piece Goods Stores-45113	\$507,937	\$45	\$0	\$507,937	\$673,470	\$673,470	\$865,037	\$865,037
Musical Instrument and Supplies Stores-45114	\$722,132	\$64	\$506,801	\$215,331	\$957,470	\$450,669	\$1,229,820	\$723,019
Prerecorded Tapes, CDs, Record Stores-45122	\$994,014	\$88	\$612,201	\$381,813	\$1,317,956	\$705,755	\$1,692,846	\$1,080,645
Food & Beverage	\$56,710,881	\$5,027	\$185,158,473	(\$128,447,592)	\$75,192,566	(\$109,965,907)	\$96,580,928	(\$88,577,545)
Full-Service Restaurants-7221	\$28,676,006	\$2,542	\$129,427,270	(\$100,751,264)	\$38,021,318	(\$91,405,952)	\$48,836,400	(\$80,590,870)
Limited Service Eating Places-7222	\$24,620,067	\$2,182	\$52,694,356	(\$28,074,289)	\$32,643,577	(\$20,050,779)	\$41,928,971	(\$10,765,385)
Drinking Places Alcoholic Beverages-7224	\$3,414,808	\$303	\$3,036,847	\$377,961	\$4,527,670	\$1,490,823	\$5,815,556	\$2,778,709
Neighborhood Retailers	\$96,000,183	\$8,510	\$147,658,870	(\$51,658,687)	\$127,285,980	(\$20,372,890)	\$163,492,201	\$15,833,331
Supermarket, Grocery -44511	\$47,368,698	\$4,199	\$65,497,858	(\$18,129,160)	\$62,805,830	(\$2,692,028)	\$80,670,812	\$15,172,954
Pharmacies and Drug Stores-44611	\$23,663,504	\$2,098	\$27,812,843	(\$4,149,339)	\$31,375,277	\$3,562,434	\$40,299,906	\$12,487,063
Convenience Stores-44512	\$2,503,206	\$222	\$6,029,246	(\$3,526,040)	\$3,318,984	(\$2,710,262)	\$4,263,061	(\$1,766,185)
Specialty Food Stores-4452	\$1,549,695	\$137	\$5,102,865	(\$3,553,170)	\$2,054,730	(\$3,048,135)	\$2,639,193	(\$2,463,672)
Beer, Wine and Liquor Stores-4453	\$4,538,651	\$402	\$0	\$4,538,651	\$6,017,766	\$6,017,766	\$7,729,507	\$7,729,507
Optical Goods Stores-44613	\$1,018,414	\$90	\$4,857,362	(\$3,838,948)	\$1,350,308	(\$3,507,054)	\$1,734,400	(\$3,122,962)
Other Health and Personal Care Stores-44619	\$1,645,205	\$146	\$1,208,686	\$436,519	\$2,181,366	\$972,680	\$2,801,851	\$1,593,165
Paint and Wallpaper Stores-44412	\$840,619	\$75	\$0	\$840,619	\$1,114,571	\$1,114,571	\$1,431,608	\$1,431,608
Hardware Stores-44413	\$3,176,503	\$282	\$4,671,185	(\$1,494,682)	\$4,211,703	(\$459,482)	\$5,409,713	\$738,528
Florists-4531	\$965,650	\$86	\$893,527	\$72,123	\$1,280,349	\$386,822	\$1,644,541	\$751,014
Other Miscellaneous Store Retailers-4539	\$6,031,923	\$535	\$3,883,001	\$2,148,922	\$7,997,685	\$4,114,684	\$10,272,609	\$6,389,608
Gift, Novelty and Souvenir Stores-45322	\$2,698,115	\$239	\$27,702,297	(\$25,004,182)	\$3,577,412	(\$24,124,885)	\$4,594,999	(\$23,107,298)
TOTALS	\$272,327,516	\$24,140	\$1,069,615,466	(\$797,287,950)	\$361,077,173	(\$708,538,293)	\$463,784,792	(\$605,830,674)

SOURCE: RCLCO; Iexpress/Claritas, Inc.; MWCOG, Round 7.1 Cooperative Forecasts

Exhibit 21

HOUSEHOLD RETAIL EXPENDITURES AND DEMAND-SUPPLY GAP ANALYSIS
CITY OF ALEXANDRIA, ARLINGTON COUNTY, AND MARKET AREAS
SEPTEMBER 2008

Retail Categories	Claritas Estimates				MWCOG HH Estimates			
	2008 Expenditures	2008 Avg. HH Expenditures	2008 Retail Sales Estimates	2008 Demand-Supply Gap	2008 Expenditures	2008 Demand-Supply Gap	2020 Expenditures	2020 Demand-Supply Gap
Old Town/Carlyle								
Major Comparison Retailers	\$131,836,923	\$9,157	\$251,699,945	(\$119,863,022)	\$150,444,454	(\$101,255,491)	\$197,906,479	(\$53,793,466)
Department Stores Excluding Leased Departments-4521	\$47,613,595	\$3,307	\$33,882,111	\$13,731,484	\$54,333,802	\$20,451,691	\$71,474,961	\$37,592,850
Radio, Television, Electronics Stores-443112	\$11,917,735	\$828	\$23,521,184	(\$11,603,449)	\$13,599,810	(\$9,921,374)	\$17,890,261	(\$5,630,923)
Household Appliances Stores-443111	\$2,853,208	\$198	\$1,851,641	\$1,001,567	\$3,255,911	\$1,404,270	\$4,283,082	\$2,431,441
Computer and Software Stores-44312	\$4,523,893	\$314	\$24,899,370	(\$20,375,477)	\$5,162,398	(\$19,736,972)	\$6,791,024	(\$18,108,346)
Office Supplies, Stationery Stores-45321	\$5,108,578	\$355	\$2,261,915	\$2,846,663	\$5,829,605	\$3,567,690	\$7,668,722	\$5,406,807
Home Furnishing Stores-4422	\$10,226,705	\$710	\$72,649,500	(\$62,422,795)	\$11,670,107	(\$60,979,393)	\$15,351,778	(\$57,297,722)
Furniture Stores-4421	\$13,304,437	\$924	\$68,869,239	(\$55,564,802)	\$15,182,232	(\$53,687,007)	\$19,971,903	(\$48,897,336)
Home Centers-44411	\$26,544,360	\$1,844	\$12,650,390	\$13,893,970	\$30,290,845	\$17,640,455	\$39,846,962	\$27,196,572
Sporting Goods Stores-45111	\$6,153,349	\$427	\$5,486,398	\$666,951	\$7,021,836	\$1,535,438	\$9,237,076	\$3,750,678
Book Stores-451211	\$3,591,063	\$249	\$5,628,197	(\$2,037,134)	\$4,097,907	(\$1,530,290)	\$5,390,710	(\$237,487)
In-Line Comparison Retailers	\$52,619,396	\$3,655	\$94,940,462	(\$42,321,066)	\$60,046,125	(\$34,894,337)	\$78,989,400	(\$15,951,062)
Clothing Stores-4481	\$29,852,684	\$2,074	\$61,206,341	(\$31,353,657)	\$34,066,107	(\$27,140,234)	\$44,813,239	(\$16,393,102)
Shoe Stores-4482	\$4,642,298	\$322	\$6,857,446	(\$2,215,148)	\$5,297,514	(\$1,559,932)	\$6,968,767	\$111,321
Jewelry Stores-44831	\$8,951,523	\$622	\$17,628,778	(\$8,677,255)	\$10,214,946	(\$7,413,832)	\$13,437,544	(\$4,191,234)
Luggage and Leather Goods Stores-44832	\$601,378	\$42	\$0	\$601,378	\$686,257	\$902,756	\$902,756	\$902,756
Camera and Photographic Equipment Stores-44313	\$810,946	\$56	\$4,082,248	(\$3,271,302)	\$925,403	(\$3,156,845)	\$1,217,348	(\$2,864,900)
Cosmetics, Beauty Supplies, Perfume Stores-44612	\$1,266,805	\$88	\$980,719	\$286,086	\$1,445,603	\$464,884	\$1,901,659	\$920,940
Hobby, Toys & Games Stores-45112	\$3,385,922	\$235	\$3,450,428	(\$64,506)	\$3,863,813	\$413,385	\$5,082,764	\$1,632,336
Sew/Needlework/Piece Goods Stores-45113	\$732,292	\$51	\$365,000	\$367,292	\$835,648	\$470,648	\$1,099,277	\$734,277
Musical Instrument and Supplies Stores-45114	\$1,024,116	\$71	\$369,502	\$654,614	\$1,168,660	\$799,158	\$1,537,348	\$1,167,846
Prerecorded Tapes, CDs, Record Stores-45122	\$1,351,432	\$94	\$0	\$1,351,432	\$1,542,174	\$1,542,174	\$2,028,697	\$2,028,697
Food & Beverage	\$77,503,265	\$5,383	\$158,386,836	(\$80,883,571)	\$88,442,116	(\$69,944,720)	\$116,343,722	(\$42,043,114)
Full-Service Restaurants-7221	\$39,256,886	\$2,727	\$103,958,334	(\$64,701,448)	\$44,797,623	(\$59,160,711)	\$58,930,320	(\$45,028,014)
Limited Service Eating Places-7222	\$33,379,823	\$2,319	\$54,428,502	(\$21,048,679)	\$38,091,068	(\$16,337,434)	\$50,107,990	(\$4,320,512)
Drinking Places Alcoholic Beverages-7224	\$4,866,556	\$338	\$0	\$4,866,556	\$5,553,424	\$5,553,424	\$7,305,411	\$7,305,411
Neighborhood Retailers	\$132,121,280	\$9,177	\$192,766,361	(\$60,645,081)	\$150,768,946	(\$41,997,415)	\$198,333,341	\$5,566,980
Supermarket, Grocery-44511	\$63,727,040	\$4,426	\$79,471,792	(\$15,744,752)	\$72,721,507	(\$6,750,285)	\$95,663,596	\$16,191,804
Pharmacies and Drug Stores-44611	\$31,698,455	\$2,202	\$42,194,072	(\$10,495,617)	\$36,172,391	(\$6,021,681)	\$47,584,011	\$5,389,939
Convenience Stores-44512	\$3,397,718	\$236	\$7,200,505	(\$3,802,787)	\$3,877,274	(\$3,323,231)	\$5,100,471	(\$2,100,034)
Specialty Food Stores-4452	\$2,051,664	\$143	\$13,146,667	(\$11,095,003)	\$2,341,237	(\$10,805,430)	\$3,079,847	(\$10,066,820)
Beer, Wine and Liquor Stores-4453	\$6,172,216	\$429	\$9,931,563	(\$3,759,347)	\$7,043,366	(\$2,888,197)	\$9,265,398	(\$666,165)
Optical Goods Stores-44613	\$1,474,014	\$102	\$16,708,779	(\$15,234,765)	\$1,682,057	(\$15,026,722)	\$2,212,710	(\$14,496,069)
Other Health and Personal Care Stores-44619	\$2,179,026	\$151	\$2,135,283	\$43,743	\$2,486,575	\$351,292	\$3,271,036	\$1,135,753
Paint and Wallpaper Stores-44412	\$1,746,822	\$121	\$0	\$1,746,822	\$1,993,369	\$1,993,369	\$2,622,235	\$2,622,235
Hardware Stores-44413	\$5,614,665	\$390	\$0	\$5,614,665	\$6,407,122	\$6,407,122	\$8,428,432	\$8,428,432
Florists-4531	\$1,488,828	\$103	\$4,151,216	(\$2,662,388)	\$1,698,962	(\$2,452,254)	\$2,234,948	(\$1,916,268)
Other Miscellaneous Store Retailers-4539	\$8,653,428	\$601	\$9,768,311	(\$1,114,883)	\$9,874,777	\$106,466	\$12,990,059	\$3,221,748
Gift, Novelty and Souvenir Stores-45322	\$3,917,404	\$272	\$8,058,173	(\$4,140,769)	\$4,470,308	(\$3,587,865)	\$5,880,596	(\$2,177,577)
TOTALS	\$394,080,864	\$27,372	\$697,793,604	(\$303,712,740)	\$449,701,640	(\$248,091,964)	\$591,572,941	(\$106,220,663)

SOURCE: RCLCO; Iexpress/Claritas, Inc.; MWCOG, Round 7.1 Cooperative Forecasts

Exhibit 21

HOUSEHOLD RETAIL EXPENDITURES AND DEMAND-SUPPLY GAP ANALYSIS
CITY OF ALEXANDRIA, ARLINGTON COUNTY, AND MARKET AREAS
SEPTEMBER 2008

Retail Categories	2008 Expenditures	Claritas Estimates			MWCOG HH Estimates			
		2008 Avg. HH Expenditures	2008 Retail Sales Estimates	2008 Demand-Supply Gap	2008 Expenditures	2008 Demand-Supply Gap	2020 Expenditures	2020 Demand-Supply Gap
Western Alexandria								
Major Comparison Retailers	\$146,740,309	\$6,915	\$307,656,747	(\$160,916,438)	\$150,756,651	(\$156,900,096)	\$172,935,045	(\$134,721,702)
Department Stores Excluding Leased Departments-4521	\$55,749,669	\$2,627	\$124,937,854	(\$69,188,185)	\$57,275,560	(\$67,662,294)	\$65,701,589	(\$59,236,265)
Radio, Television, Electronics Stores-443112	\$13,906,483	\$655	\$25,835,425	(\$11,928,942)	\$14,287,109	(\$11,548,316)	\$16,388,941	(\$9,446,484)
Household Appliances Stores-443111	\$3,354,627	\$158	\$3,570,029	(\$215,402)	\$3,446,445	(\$123,584)	\$3,953,464	\$383,435
Computer and Software Stores-44312	\$5,168,183	\$244	\$2,759,783	\$2,408,400	\$5,309,638	\$2,549,855	\$6,090,760	\$3,330,977
Office Supplies, Stationery Stores-45321	\$5,727,060	\$270	\$4,0925	\$5,686,135	\$5,883,812	\$5,842,887	\$6,749,402	\$6,708,477
Home Furnishing Stores-4422	\$10,201,655	\$481	\$34,592,632	(\$24,390,977)	\$10,480,878	(\$24,111,754)	\$12,022,761	(\$22,569,871)
Furniture Stores-4421	\$13,863,259	\$653	\$34,829,597	(\$20,966,338)	\$14,242,702	(\$20,586,895)	\$16,338,001	(\$18,491,596)
Home Centers-44411	\$28,197,161	\$1,329	\$71,203,611	(\$43,006,450)	\$28,968,929	(\$42,234,682)	\$33,230,660	(\$37,972,951)
Sporting Goods Stores-45111	\$6,666,514	\$314	\$8,457,473	(\$1,790,959)	\$6,848,979	(\$1,608,494)	\$7,856,559	(\$600,914)
Book Stores-451211	\$3,905,698	\$184	\$1,429,418	\$2,476,280	\$4,012,599	\$2,583,181	\$4,602,907	\$3,173,489
In-Line Comparison Retailers	\$59,938,513	\$2,825	\$47,020,891	\$12,917,622	\$61,579,054	\$14,558,163	\$70,638,187	\$23,617,296
Clothing Stores-4481	\$34,661,763	\$1,633	\$19,064,835	\$15,596,928	\$35,610,470	\$16,545,635	\$40,849,263	\$21,784,428
Shoe Stores-4482	\$5,940,093	\$280	\$10,976,558	(\$5,036,465)	\$6,102,676	(\$4,873,882)	\$7,000,464	(\$3,976,094)
Jewelry Stores-44831	\$8,470,792	\$399	\$7,950,233	\$520,559	\$8,702,641	\$752,408	\$9,982,920	\$2,032,687
Luggage and Leather Goods Stores-44832	\$621,030	\$29	\$920,000	(\$298,970)	\$638,028	(\$281,972)	\$731,891	(\$188,109)
Camera and Photographic Equipment Stores-44313	\$930,146	\$44	\$26,525	\$903,621	\$955,604	\$929,079	\$1,096,187	\$1,069,662
Cosmetics, Beauty Supplies, Perfume Stores-44612	\$1,653,724	\$78	\$678,961	\$974,763	\$1,698,987	\$1,020,026	\$1,948,932	\$1,269,971
Hobby, Toys & Games Stores-45112	\$3,866,906	\$182	\$1,649,778	\$2,217,128	\$3,972,745	\$2,322,967	\$4,557,191	\$2,907,413
Sew/Needlework/Piece Goods Stores-45113	\$871,148	\$41	\$0	\$871,148	\$894,992	\$894,992	\$1,026,657	\$1,026,657
Musical Instrument and Supplies Stores-45114	\$1,207,252	\$57	\$0	\$1,207,252	\$1,240,295	\$1,240,295	\$1,422,760	\$1,422,760
Prerecorded Tapes, CDs, Record Stores-45122	\$1,715,659	\$81	\$5,754,001	(\$4,038,342)	\$1,762,617	(\$3,991,384)	\$2,021,923	(\$3,732,078)
Food & Beverage	\$94,862,719	\$4,470	\$49,458,445	\$45,404,274	\$97,459,150	\$48,000,705	\$111,796,743	\$62,338,298
Full-Service Restaurants-7221	\$47,847,559	\$2,255	\$29,224,906	\$18,622,653	\$49,157,166	\$19,932,260	\$56,388,867	\$27,163,961
Limited Service Eating Places-7222	\$41,591,336	\$1,960	\$20,233,539	\$21,357,797	\$42,729,708	\$22,496,169	\$49,015,840	\$28,782,301
Drinking Places Alcoholic Beverages-7224	\$5,423,824	\$256	\$0	\$5,423,824	\$5,572,276	\$5,572,276	\$6,392,035	\$6,392,035
Neighborhood Retailers	\$173,553,661	\$8,179	\$148,501,364	\$25,052,297	\$178,303,895	\$29,802,531	\$204,534,871	\$56,033,507
Supermarket, Grocery -44511	\$88,080,788	\$4,151	\$66,384,819	\$21,695,969	\$90,491,595	\$24,106,776	\$103,804,163	\$37,419,344
Pharmacies and Drug Stores-44611	\$41,440,421	\$1,953	\$49,385,944	(\$7,945,523)	\$42,574,662	(\$6,811,282)	\$48,837,985	(\$547,959)
Convenience Stores-44512	\$4,630,141	\$218	\$8,064,564	(\$3,434,423)	\$4,756,870	(\$3,307,694)	\$5,456,671	(\$2,607,893)
Specialty Food Stores-4452	\$2,919,922	\$138	\$0	\$2,919,922	\$2,999,841	\$2,999,841	\$3,441,160	\$3,441,160
Beer, Wine and Liquor Stores-4453	\$7,593,529	\$358	\$1,495,645	\$6,097,884	\$7,801,367	\$6,305,722	\$8,949,056	\$7,453,411
Optical Goods Stores-44613	\$1,679,843	\$79	\$14,202,464	(\$12,522,621)	\$1,725,821	(\$12,476,643)	\$1,979,713	(\$12,222,751)
Other Health and Personal Care Stores-44619	\$2,901,813	\$137	\$4,377,044	(\$1,475,231)	\$2,981,237	(\$1,395,807)	\$3,419,818	(\$957,226)
Paint and Wallpaper Stores-44412	\$1,732,912	\$82	\$1,828,735	(\$95,823)	\$1,780,343	(\$48,392)	\$2,042,256	\$213,521
Hardware Stores-44413	\$6,221,958	\$293	\$0	\$6,221,958	\$6,392,256	\$6,392,256	\$7,332,645	\$7,332,645
Florists-4531	\$1,670,951	\$79	\$574,989	\$1,095,962	\$1,716,686	\$1,141,697	\$1,969,234	\$1,394,245
Other Miscellaneous Store Retailers-4539	\$10,357,479	\$488	\$949,318	\$9,408,161	\$10,640,967	\$9,691,649	\$12,206,401	\$11,257,083
Gift, Novelty and Souvenir Stores-45322	\$4,323,904	\$204	\$1,237,842	\$3,086,062	\$4,442,251	\$3,204,409	\$5,095,768	\$3,857,926
TOTALS	\$475,095,202	\$22,389	\$552,637,447	(\$77,542,245)	\$488,098,750	(\$64,538,697)	\$559,904,845	\$7,267,398

SOURCE: RCLCO; Iexpress/Claritas, Inc.; MWCOG, Round 7.1 Cooperative Forecasts

Exhibit 21

HOUSEHOLD RETAIL EXPENDITURES AND DEMAND-SUPPLY GAP ANALYSIS
CITY OF ALEXANDRIA, ARLINGTON COUNTY, AND MARKET AREAS
SEPTEMBER 2008

Retail Categories	Claritas Estimates				MWCOG HH Estimates			
	2008 Expenditures	2008 Avg. HH Expenditures	2008 Retail Sales Estimates	2008 Demand-Supply Gap	2008 Expenditures	2008 Demand-Supply Gap	2020 Expenditures	2020 Demand-Supply Gap
Shirlington/Fairlington								
Major Comparison Retailers	\$137,166,991	\$8,390	\$31,046,606	\$106,120,385	\$166,951,248	\$135,904,642	\$174,309,218	\$143,262,612
Department Stores Excluding Leased Departments-4521	\$50,202,714	\$3,071	\$8,655,051	\$41,547,663	\$61,103,664	\$52,448,613	\$63,796,659	\$55,141,608
Radio, Television, Electronics Stores-443112	\$12,474,159	\$763	\$6,093,580	\$6,380,599	\$15,182,781	\$9,089,221	\$15,851,925	\$9,758,365
Household Appliances Stores-443111	\$3,058,245	\$187	\$1,078,280	\$1,979,965	\$3,722,308	\$2,644,028	\$3,886,360	\$2,808,080
Computer and Software Stores-44312	\$4,696,745	\$287	\$1,404,862	\$3,291,883	\$5,716,590	\$4,311,728	\$5,968,535	\$4,563,673
Office Supplies, Stationery Stores-45321	\$5,294,705	\$324	\$0	\$5,294,705	\$6,444,390	\$6,444,390	\$6,728,411	\$6,728,411
Home Furnishing Stores-4422	\$10,073,020	\$616	\$1,205,651	\$8,867,369	\$12,260,262	\$11,054,611	\$12,800,603	\$11,594,952
Furniture Stores-4421	\$13,033,085	\$797	\$6,436,380	\$6,596,705	\$15,863,072	\$9,426,692	\$16,562,198	\$10,125,818
Home Centers-44411	\$28,317,356	\$1,732	\$0	\$28,317,356	\$34,466,149	\$34,466,149	\$35,985,160	\$35,985,160
Sporting Goods Stores-45111	\$6,275,973	\$384	\$3,891,953	\$2,384,020	\$7,638,729	\$3,746,776	\$7,975,388	\$4,083,435
Book Stores-451211	\$3,740,989	\$229	\$2,280,869	\$1,460,120	\$4,553,302	\$2,272,433	\$4,753,978	\$2,473,109
In-Line Comparison Retailers	\$54,725,192	\$3,347	\$10,718,980	\$44,006,212	\$66,608,147	\$55,889,167	\$69,543,739	\$58,824,759
Clothing Stores-4481	\$31,491,977	\$1,926	\$7,298,167	\$24,193,810	\$38,330,103	\$31,031,936	\$40,019,409	\$32,721,242
Shoe Stores-4482	\$5,179,963	\$317	\$1,416,338	\$3,763,625	\$6,304,733	\$4,888,395	\$6,582,599	\$5,166,261
Jewelry Stores-44831	\$8,308,895	\$508	\$0	\$8,308,895	\$10,113,077	\$10,113,077	\$10,558,787	\$10,558,787
Luggage and Leather Goods Stores-44832	\$589,396	\$36	\$0	\$589,396	\$717,377	\$717,377	\$748,993	\$748,993
Camera and Photographic Equipment Stores-44313	\$849,857	\$52	\$1,334,225	(\$484,368)	\$1,034,394	(\$299,831)	\$1,079,982	(\$254,243)
Cosmetics, Beauty Supplies, Perfume Stores-44612	\$1,367,319	\$84	\$150,879	\$1,216,440	\$1,664,217	\$1,513,338	\$1,737,563	\$1,586,684
Hobby, Toys & Games Stores-45112	\$3,574,940	\$219	\$519,371	\$3,055,569	\$4,351,198	\$3,831,827	\$4,542,966	\$4,023,595
Sew/Needlework/Piece Goods Stores-45113	\$789,597	\$48	\$0	\$789,597	\$961,049	\$961,049	\$1,003,405	\$1,003,405
Musical Instrument and Supplies Stores-45114	\$1,083,304	\$66	\$0	\$1,083,304	\$1,318,531	\$1,318,531	\$1,376,642	\$1,376,642
Prerecorded Tapes, CDs, Record Stores-45122	\$1,489,944	\$91	\$0	\$1,489,944	\$1,813,468	\$1,813,468	\$1,893,393	\$1,893,393
Food & Beverage	\$82,619,688	\$5,054	\$107,183,437	(\$24,563,749)	\$100,559,617	(\$6,623,820)	\$104,991,537	(\$2,191,900)
Full-Service Restaurants-7221	\$41,755,219	\$2,554	\$81,628,979	(\$39,873,760)	\$50,821,891	(\$30,807,088)	\$53,061,743	(\$28,567,236)
Limited Service Eating Places-7222	\$35,917,307	\$2,197	\$25,554,458	\$10,362,849	\$43,716,343	\$18,161,885	\$45,643,034	\$20,088,576
Drinking Places Alcoholic Beverages-7224	\$4,947,162	\$303	\$0	\$4,947,162	\$6,021,382	\$6,021,382	\$6,286,760	\$6,286,760
Neighborhood Retailers	\$146,827,617	\$8,981	\$160,793,256	(\$13,965,639)	\$178,709,569	\$17,916,313	\$186,585,759	\$25,792,503
Supermarket, Grocery -44511	\$72,989,518	\$4,464	\$116,423,049	(\$43,433,531)	\$88,838,364	(\$27,584,685)	\$92,753,699	(\$23,669,350)
Pharmacies and Drug Stores-44611	\$34,423,724	\$2,106	\$12,682,797	\$21,740,927	\$41,898,445	\$29,215,648	\$43,745,017	\$31,062,220
Convenience Stores-44512	\$3,856,836	\$236	\$9,696,090	(\$5,839,254)	\$4,694,304	(\$5,001,786)	\$4,901,194	(\$4,794,896)
Specialty Food Stores-4452	\$2,387,627	\$146	\$64,318	\$2,323,309	\$2,906,073	\$2,841,755	\$3,034,151	\$2,969,833
Beer, Wine and Liquor Stores-4453	\$6,608,988	\$404	\$9,823,434	(\$3,214,446)	\$8,044,055	(\$1,779,379)	\$8,398,577	(\$1,424,857)
Optical Goods Stores-44613	\$1,554,921	\$95	\$3,177,555	(\$1,622,634)	\$1,892,554	(\$1,285,001)	\$1,975,964	(\$1,201,591)
Other Health and Personal Care Stores-44619	\$2,381,706	\$146	\$1,837,065	\$544,641	\$2,898,866	\$1,061,801	\$3,026,627	\$1,189,562
Paint and Wallpaper Stores-44412	\$1,758,160	\$108	\$2,162,885	(\$404,725)	\$2,139,925	(\$22,960)	\$2,234,236	\$71,351
Hardware Stores-44413	\$6,019,555	\$368	\$0	\$6,019,555	\$7,326,633	\$7,326,633	\$7,649,537	\$7,649,537
Florists-4531	\$1,564,464	\$96	\$1,143,562	\$420,902	\$1,904,170	\$760,608	\$1,988,091	\$844,529
Other Miscellaneous Store Retailers-4539	\$9,254,643	\$566	\$1,589,005	\$7,665,638	\$11,264,184	\$9,675,179	\$11,760,625	\$10,171,620
Gift, Novelty and Souvenir Stores-45322	\$4,027,475	\$246	\$2,193,496	\$1,833,979	\$4,901,996	\$2,708,500	\$5,118,039	\$2,924,543
TOTALS	\$421,339,488	\$25,772	\$309,742,279	\$111,597,209	\$512,828,581	\$203,086,302	\$535,430,253	\$225,687,974

SOURCE: RCLCO; Iexpress/Claritas, Inc.; MWCOG, Round 7.1 Cooperative Forecasts

Exhibit 21

HOUSEHOLD RETAIL EXPENDITURES AND DEMAND-SUPPLY GAP ANALYSIS
CITY OF ALEXANDRIA, ARLINGTON COUNTY, AND MARKET AREAS
SEPTEMBER 2008

Columbia Pike Retail Categories	Claritas Estimates				MWCOG HH Estimates			
	2008 Expenditures	2008 Avg. HH Expenditures	2008 Retail Sales Estimates	2008 Demand-Supply Gap	2008 Expenditures	2008 Demand-Supply Gap	2020 Expenditures	2020 Demand-Supply Gap
Major Comparison Retailers	\$131,714,447	\$6,850	\$28,279,945	\$103,434,502	\$123,039,433	\$94,759,488	\$142,976,073	\$114,696,128
Department Stores Excluding Leased Departments-4521	\$51,814,465	\$2,695	\$17,909,638	\$33,904,827	\$48,401,846	\$30,492,208	\$56,244,618	\$38,334,980
Radio, Television, Electronics Stores-443112	\$12,563,273	\$653	\$3,638,206	\$8,925,067	\$11,735,827	\$8,097,621	\$13,637,437	\$9,999,231
Household Appliances Stores-443111	\$2,976,497	\$155	\$1,028,366	\$1,948,131	\$2,780,458	\$1,752,092	\$3,230,988	\$2,202,622
Computer and Software Stores-44312	\$4,580,943	\$238	\$625,367	\$3,955,576	\$4,279,232	\$3,653,865	\$4,972,615	\$4,347,248
Office Supplies, Stationery Stores-45321	\$4,985,176	\$259	\$0	\$4,985,176	\$4,656,841	\$4,656,841	\$5,411,410	\$5,411,410
Home Furnishing Stores-4422	\$8,752,235	\$455	\$396,560	\$8,355,675	\$8,175,793	\$7,779,233	\$9,500,554	\$9,103,994
Furniture Stores-4421	\$12,177,612	\$633	\$4,476,858	\$7,700,754	\$11,375,567	\$6,898,709	\$13,218,802	\$8,741,944
Home Centers-44411	\$24,543,287	\$1,276	\$0	\$24,543,287	\$22,926,810	\$22,926,810	\$26,641,746	\$26,641,746
Sporting Goods Stores-45111	\$6,019,194	\$313	\$204,950	\$5,814,244	\$5,622,756	\$5,417,806	\$6,533,837	\$6,328,887
Book Stores-451211	\$3,301,765	\$172	\$0	\$3,301,765	\$3,084,303	\$3,084,303	\$3,584,067	\$3,584,067
In-Line Comparison Retailers	\$55,863,732	\$2,905	\$14,643,653	\$41,220,079	\$52,184,419	\$37,540,766	\$60,640,099	\$45,996,446
Clothing Stores-4481	\$33,006,654	\$1,717	\$11,123,970	\$21,882,684	\$30,832,760	\$19,708,790	\$35,828,733	\$24,704,763
Shoe Stores-4482	\$5,953,633	\$310	\$0	\$5,953,633	\$5,561,513	\$5,561,513	\$6,462,670	\$6,462,670
Jewelry Stores-44831	\$7,133,947	\$371	\$2,437,768	\$4,696,179	\$6,664,089	\$4,226,321	\$7,743,902	\$5,306,134
Luggage and Leather Goods Stores-44832	\$538,187	\$28	\$85,052	\$453,135	\$502,741	\$417,689	\$584,202	\$499,150
Camera and Photographic Equipment Stores-44313	\$823,212	\$43	\$0	\$823,212	\$768,993	\$768,993	\$893,597	\$893,597
Cosmetics, Beauty Supplies, Perfume Stores-44612	\$1,529,960	\$80	\$177,708	\$1,352,252	\$1,429,193	\$1,251,485	\$1,660,772	\$1,483,064
Hobby, Toys & Games Stores-45112	\$3,461,062	\$180	\$191,070	\$3,269,992	\$3,233,109	\$3,042,039	\$3,756,984	\$3,565,914
Sew/Needlework/Piece Goods Stores-45113	\$774,152	\$40	\$0	\$774,152	\$723,165	\$723,165	\$840,342	\$840,342
Musical Instrument and Supplies Stores-45114	\$1,112,550	\$58	\$168,935	\$943,615	\$1,039,275	\$870,340	\$1,207,673	\$1,038,738
Prerecorded Tapes, CDs, Record Stores-45122	\$1,530,375	\$80	\$459,150	\$1,071,225	\$1,429,581	\$970,431	\$1,661,223	\$1,202,073
Food & Beverage	\$84,987,541	\$4,420	\$33,834,574	\$51,152,967	\$79,390,067	\$45,555,493	\$92,254,002	\$58,419,428
Full-Service Restaurants-7221	\$42,774,623	\$2,225	\$17,908,174	\$24,866,449	\$39,957,389	\$22,049,215	\$46,431,867	\$28,523,693
Limited Service Eating Places-7222	\$37,575,887	\$1,954	\$15,926,400	\$21,649,487	\$35,101,053	\$19,174,653	\$40,788,637	\$24,862,237
Drinking Places Alcoholic Beverages-7224	\$4,637,031	\$241	\$0	\$4,637,031	\$4,331,626	\$4,331,626	\$5,033,499	\$5,033,499
Neighborhood Retailers	\$165,371,039	\$8,601	\$103,228,969	\$62,142,070	\$154,479,325	\$51,250,356	\$179,510,314	\$76,281,345
Supermarket, Grocery -44511	\$86,905,852	\$4,520	\$48,461,847	\$38,444,005	\$81,182,034	\$32,720,187	\$94,336,329	\$45,874,482
Pharmacies and Drug Stores-44611	\$38,474,672	\$2,001	\$28,318,519	\$10,156,153	\$35,940,642	\$7,622,123	\$41,764,268	\$13,445,749
Convenience Stores-44512	\$4,466,567	\$232	\$17,364,238	(\$12,897,671)	\$4,172,389	(\$13,191,849)	\$4,848,460	(\$12,515,778)
Specialty Food Stores-4452	\$2,938,484	\$153	\$175,961	\$2,762,523	\$2,744,949	\$2,568,988	\$3,189,725	\$3,013,764
Beer, Wine and Liquor Stores-4453	\$6,862,416	\$357	\$0	\$6,862,416	\$6,410,442	\$6,410,442	\$7,449,155	\$7,449,155
Optical Goods Stores-44613	\$1,535,287	\$80	\$711,997	\$823,290	\$1,434,169	\$722,172	\$1,666,555	\$954,558
Other Health and Personal Care Stores-44619	\$2,714,279	\$141	\$293,668	\$2,420,611	\$2,535,510	\$2,241,842	\$2,946,351	\$2,652,683
Paint and Wallpaper Stores-44412	\$1,459,172	\$76	\$0	\$1,459,172	\$1,363,068	\$1,363,068	\$1,583,932	\$1,583,932
Hardware Stores-44413	\$5,453,879	\$284	\$0	\$5,453,879	\$5,094,674	\$5,094,674	\$5,920,187	\$5,920,187
Florists-4531	\$1,455,111	\$76	\$315,955	\$1,139,156	\$1,359,274	\$1,043,319	\$1,579,523	\$1,263,568
Other Miscellaneous Store Retailers-4539	\$9,332,321	\$485	\$5,245,745	\$4,086,576	\$8,717,673	\$3,471,928	\$10,130,237	\$4,884,492
Gift, Novelty and Souvenir Stores-45322	\$3,772,999	\$196	\$2,341,039	\$1,431,960	\$3,524,501	\$1,183,462	\$4,095,592	\$1,754,553
TOTALS	\$437,936,759	\$22,776	\$179,987,141	\$257,949,618	\$409,093,244	\$229,106,103	\$475,380,489	\$295,393,348

SOURCE: RCLCO; Ixpress/Claritas, Inc.; MWCOG, Round 7.1 Cooperative Forecasts

Exhibit 21

HOUSEHOLD RETAIL EXPENDITURES AND DEMAND-SUPPLY GAP ANALYSIS
CITY OF ALEXANDRIA, ARLINGTON COUNTY, AND MARKET AREAS
SEPTEMBER 2008

Retail Categories	Claritas Estimates				MWCOG HH Estimates			
	2008 Expenditures	2008 Avg. HH Expenditures	2008 Retail Sales Estimates	2008 Demand-Supply Gap	2008 Expenditures	2008 Demand-Supply Gap	2020 Expenditures	2020 Demand-Supply Gap
Rossllyn/Ballston								
Major Comparison Retailers	\$244,582,388	\$7,604	\$194,132,112	\$50,450,276	\$268,670,312	\$74,538,200	\$324,439,507	\$130,307,395
Department Stores Excluding Leased Departments-4521	\$92,789,871	\$2,885	\$65,223,146	\$27,566,725	\$101,928,368	\$36,705,222	\$123,086,132	\$57,862,986
Radio, Television, Electronics Stores-443112	\$23,907,693	\$743	\$8,169,032	\$15,738,661	\$26,262,264	\$18,093,232	\$31,713,650	\$23,544,618
Household Appliances Stores-443111	\$5,403,809	\$168	\$342,790	\$5,061,019	\$5,936,008	\$5,593,218	\$7,168,174	\$6,825,384
Computer and Software Stores-44312	\$9,000,106	\$280	\$12,637,592	(\$3,637,486)	\$9,886,490	(\$2,751,102)	\$11,938,676	(\$698,916)
Office Supplies, Stationery Stores-45321	\$10,190,521	\$317	\$15,642,858	(\$5,452,337)	\$11,194,144	(\$4,448,714)	\$13,517,767	(\$2,125,091)
Home Furnishing Stores-4422	\$17,286,144	\$537	\$58,492,357	(\$41,206,213)	\$18,988,586	(\$39,503,771)	\$22,930,139	(\$35,562,218)
Furniture Stores-4421	\$24,522,642	\$762	\$11,597,170	\$12,925,472	\$26,937,777	\$15,340,607	\$32,529,382	\$20,932,212
Home Centers-44411	\$42,031,447	\$1,307	\$0	\$42,031,447	\$46,170,953	\$46,170,953	\$55,754,881	\$55,754,881
Sporting Goods Stores-45111	\$12,007,001	\$373	\$10,657,432	\$1,349,569	\$13,189,522	\$2,532,090	\$15,927,334	\$5,269,902
Book Stores-451211	\$7,443,154	\$231	\$11,369,735	(\$3,926,581)	\$8,176,200	(\$3,193,535)	\$9,873,373	(\$1,496,362)
In-Line Comparison Retailers	\$103,262,085	\$3,210	\$95,427,748	\$7,834,337	\$113,431,948	\$18,004,200	\$136,977,565	\$41,549,817
Clothing Stores-4481	\$59,002,118	\$1,834	\$65,668,850	(\$6,666,732)	\$64,812,997	(\$855,853)	\$78,266,543	\$12,597,693
Shoe Stores-4482	\$9,664,671	\$300	\$10,002,805	(\$338,134)	\$10,616,505	\$613,700	\$12,820,224	\$2,817,419
Jewelry Stores-44831	\$16,359,013	\$509	\$11,579,396	\$4,779,617	\$17,970,146	\$6,390,750	\$21,700,296	\$10,120,900
Luggage and Leather Goods Stores-44832	\$1,134,458	\$35	\$42,526	\$1,091,932	\$1,246,186	\$1,203,660	\$1,504,863	\$1,462,337
Camera and Photographic Equipment Stores-44313	\$1,585,543	\$49	\$458,965	\$1,126,578	\$1,741,697	\$1,282,732	\$2,103,229	\$1,644,264
Cosmetics, Beauty Supplies, Perfume Stores-44612	\$2,499,724	\$78	\$1,688,226	\$811,498	\$2,745,912	\$1,057,686	\$3,315,894	\$1,627,668
Hobby, Toys & Games Stores-45112	\$6,536,646	\$203	\$3,152,663	\$3,383,983	\$7,180,414	\$4,027,751	\$8,670,887	\$5,518,224
Sew/Needlework/Piece Goods Stores-45113	\$1,436,145	\$45	\$0	\$1,436,145	\$1,577,585	\$1,577,585	\$1,905,052	\$1,905,052
Musical Instrument and Supplies Stores-45114	\$2,107,171	\$66	\$844,668	\$1,262,503	\$2,314,698	\$1,470,030	\$2,795,171	\$1,950,503
Prerecorded Tapes, CDs, Record Stores-45122	\$2,936,596	\$91	\$1,989,649	\$946,947	\$3,225,809	\$1,236,160	\$3,895,406	\$1,905,757
Food & Beverage	\$163,256,335	\$5,076	\$220,458,914	(\$57,202,579)	\$179,334,787	(\$41,124,127)	\$216,560,176	(\$3,898,738)
Full-Service Restaurants-7221	\$82,550,962	\$2,566	\$102,565,013	(\$20,014,051)	\$90,681,070	(\$11,883,943)	\$109,504,178	\$6,939,165
Limited Service Eating Places-7222	\$70,876,248	\$2,204	\$107,965,748	(\$37,089,500)	\$77,856,561	(\$30,109,187)	\$94,017,624	(\$13,948,124)
Drinking Places Alcoholic Beverages-7224	\$9,829,125	\$306	\$9,928,153	(\$99,028)	\$10,797,156	\$869,003	\$13,038,373	\$3,110,220
Neighborhood Retailers	\$268,420,886	\$8,345	\$371,778,496	(\$103,357,610)	\$294,856,567	(\$76,921,929)	\$356,061,369	(\$15,717,127)
Supermarket, Grocery -44511	\$133,745,581	\$4,158	\$212,008,357	(\$78,262,776)	\$146,917,639	(\$65,090,718)	\$177,414,043	(\$34,594,314)
Pharmacies and Drug Stores-44611	\$63,134,078	\$1,963	\$61,693,920	\$1,440,158	\$69,351,897	\$7,657,977	\$83,747,605	\$22,053,685
Convenience Stores-44512	\$7,227,269	\$225	\$19,721,118	(\$12,493,849)	\$7,939,053	(\$11,782,065)	\$9,587,001	(\$10,134,117)
Specialty Food Stores-4452	\$4,374,143	\$136	\$11,613,416	(\$7,239,273)	\$4,804,935	(\$6,808,481)	\$5,802,318	(\$5,811,098)
Beer, Wine and Liquor Stores-4453	\$12,911,212	\$401	\$9,440,635	\$3,470,577	\$14,182,785	\$4,742,150	\$17,126,774	\$7,686,139
Optical Goods Stores-44613	\$2,731,389	\$85	\$3,192,138	(\$460,749)	\$3,000,392	(\$191,746)	\$3,623,198	\$431,060
Other Health and Personal Care Stores-44619	\$4,349,906	\$135	\$1,286,543	\$3,063,363	\$4,778,311	\$3,491,768	\$5,770,168	\$4,483,625
Paint and Wallpaper Stores-44412	\$2,518,176	\$78	\$1,275,001	\$1,243,175	\$2,766,181	\$1,491,180	\$3,340,370	\$2,065,369
Hardware Stores-44413	\$9,650,622	\$300	\$0	\$9,650,622	\$10,601,073	\$10,601,073	\$12,801,588	\$12,801,588
Florists-4531	\$2,694,412	\$84	\$3,109,490	(\$415,078)	\$2,959,774	(\$149,716)	\$3,574,148	\$464,658
Other Miscellaneous Store Retailers-4539	\$17,361,275	\$540	\$15,273,156	\$2,088,119	\$19,071,116	\$3,797,960	\$23,029,800	\$7,756,644
Gift, Novelty and Souvenir Stores-45322	\$7,722,823	\$240	\$3,164,722	(\$25,441,899)	\$8,483,412	(\$24,681,310)	\$10,244,355	(\$22,920,367)
TOTALS	\$779,521,694	\$24,235	\$881,797,270	(\$102,275,576)	\$856,293,614	(\$25,503,656)	\$1,034,038,617	\$152,241,347

SOURCE: RCLCO; Iexpress/Claritas, Inc.; MWCOG, Round 7.1 Cooperative Forecasts

Exhibit 21

HOUSEHOLD RETAIL EXPENDITURES AND DEMAND-SUPPLY GAP ANALYSIS
CITY OF ALEXANDRIA, ARLINGTON COUNTY, AND MARKET AREAS
SEPTEMBER 2008

Retail Categories	2008 Expenditures	Claritas Estimates			MWCOG HH Estimates			
		2008 Avg. HH Expenditures	2008 Retail Sales Estimates	2008 Demand-Supply Gap	2008 Expenditures	2008 Demand-Supply Gap	2020 Expenditures	2020 Demand-Supply Gap
Far Western Alexandria								
Major Comparison Retailers	\$127,960,412	\$7,015	\$106,087,257	\$21,873,155	\$114,009,640	\$7,922,383	\$117,640,798	\$11,553,541
Department Stores Excluding Leased Departments-4521	\$50,150,949	\$2,750	\$3,039,901	\$17,111,048	\$44,683,286	\$11,643,385	\$46,106,429	\$13,066,528
Radio, Television, Electronics Stores-443112	\$12,166,392	\$667	\$18,120,506	(\$5,954,114)	\$10,839,962	(\$7,280,544)	\$11,185,210	(\$6,935,296)
Household Appliances Stores-443111	\$2,871,654	\$157	\$2,784,201	\$87,453	\$2,558,574	(\$225,627)	\$2,640,064	(\$144,137)
Computer and Software Stores-44312	\$4,500,885	\$247	\$8,205,434	(\$3,704,549)	\$4,010,180	(\$4,195,254)	\$4,137,902	(\$4,067,532)
Office Supplies, Stationery Stores-45321	\$4,846,694	\$266	\$4,482,094	\$364,600	\$4,318,287	(\$163,807)	\$4,455,823	(\$26,271)
Home Furnishing Stores-4422	\$8,665,278	\$475	\$11,029,281	(\$2,364,003)	\$7,720,554	(\$3,308,727)	\$7,966,450	(\$3,062,831)
Furniture Stores-4421	\$12,010,487	\$658	\$24,856,128	(\$12,845,641)	\$10,701,054	(\$14,155,074)	\$11,041,878	(\$13,814,250)
Home Centers-44411	\$23,521,733	\$1,290	\$0	\$23,521,733	\$20,957,297	\$20,957,297	\$21,624,777	\$21,624,777
Sporting Goods Stores-45111	\$5,911,725	\$324	\$1,626,542	\$4,285,183	\$5,267,204	\$3,640,662	\$5,434,963	\$3,808,421
Book Stores-451211	\$3,314,615	\$182	\$1,943,170	\$1,371,445	\$2,953,242	\$1,010,072	\$3,047,301	\$1,104,131
In-Line Comparison Retailers	\$54,092,928	\$2,966	\$15,725,196	\$38,367,732	\$48,195,494	\$32,470,298	\$49,730,499	\$34,005,303
Clothing Stores-4481	\$31,773,040	\$1,742	\$8,284,968	\$23,488,072	\$28,309,012	\$20,024,044	\$29,210,642	\$20,925,674
Shoe Stores-4482	\$5,646,811	\$310	\$627,877	\$5,018,934	\$5,031,172	\$4,403,295	\$5,191,413	\$4,563,536
Jewelry Stores-44831	\$7,117,022	\$390	\$925,584	\$6,191,438	\$6,341,095	\$5,415,511	\$6,543,056	\$5,617,472
Luggage and Leather Goods Stores-44832	\$536,302	\$29	\$0	\$536,302	\$477,832	\$477,832	\$493,051	\$493,051
Camera and Photographic Equipment Stores-44313	\$818,728	\$45	\$1,901,817	(\$1,083,089)	\$729,467	(\$1,172,350)	\$752,700	(\$1,149,117)
Cosmetics, Beauty Supplies, Perfume Stores-44612	\$1,473,048	\$81	\$0	\$1,473,048	\$1,312,450	\$1,312,450	\$1,354,251	\$1,354,251
Hobby, Toys & Games Stores-45112	\$3,412,235	\$187	\$1,608,657	\$1,803,578	\$3,040,219	\$1,431,562	\$3,137,049	\$1,528,392
Sew/Needlework/Piece Goods Stores-45113	\$756,730	\$41	\$302,207	\$454,523	\$674,228	\$372,021	\$695,702	\$393,495
Musical Instrument and Supplies Stores-45114	\$1,072,518	\$59	\$1,633,902	(\$561,384)	\$955,588	(\$678,314)	\$986,023	(\$647,879)
Prerecorded Tapes, CDs, Record Stores-45122	\$1,486,494	\$81	\$440,184	\$1,046,310	\$1,324,430	\$884,246	\$1,366,613	\$926,429
Food & Beverage	\$81,168,384	\$4,450	\$24,765,636	\$56,402,748	\$72,319,072	\$47,553,436	\$74,622,403	\$49,856,767
Full-Service Restaurants-7221	\$40,854,871	\$2,240	\$8,562,166	\$32,292,705	\$36,400,705	\$27,838,539	\$37,560,051	\$28,997,885
Limited Service Eating Places-7222	\$35,884,521	\$1,967	\$16,203,470	\$19,681,051	\$31,972,243	\$15,768,773	\$32,990,545	\$16,787,075
Drinking Places Alcoholic Beverages-7224	\$4,428,992	\$243	\$0	\$4,428,992	\$3,946,125	\$3,946,125	\$4,071,807	\$4,071,807
Neighborhood Retailers	\$157,058,139	\$8,611	\$116,385,509	\$40,672,630	\$139,935,013	\$23,549,504	\$144,391,882	\$28,006,373
Supermarket, Grocery -44511	\$81,740,482	\$4,481	\$51,805,519	\$29,934,963	\$72,828,798	\$21,023,279	\$75,148,363	\$23,342,844
Pharmacies and Drug Stores-44611	\$36,938,347	\$2,025	\$15,537,446	\$21,400,901	\$32,911,176	\$17,373,730	\$33,959,383	\$18,421,937
Convenience Stores-44512	\$4,170,753	\$229	\$28,972,727	(\$24,801,974)	\$3,716,040	(\$25,256,687)	\$3,834,395	(\$25,138,332)
Specialty Food Stores-4452	\$2,756,048	\$151	\$14,453	\$2,741,595	\$2,455,572	\$2,441,119	\$2,533,781	\$2,519,328
Beer, Wine and Liquor Stores-4453	\$6,519,216	\$357	\$11,441,731	(\$4,922,515)	\$5,808,464	(\$5,633,267)	\$5,993,461	(\$5,448,270)
Optical Goods Stores-44613	\$1,519,725	\$83	\$930,449	\$589,276	\$1,354,038	\$423,589	\$1,397,164	\$466,715
Other Health and Personal Care Stores-44619	\$2,602,839	\$143	\$1,055,283	\$1,547,556	\$2,319,067	\$1,263,784	\$2,392,928	\$1,337,645
Paint and Wallpaper Stores-44412	\$1,441,805	\$79	\$2,345,046	(\$903,241)	\$1,284,613	(\$1,060,433)	\$1,325,528	(\$1,019,518)
Hardware Stores-44413	\$5,270,650	\$289	\$0	\$5,270,650	\$4,696,022	\$4,696,022	\$4,845,588	\$4,845,588
Florists-4531	\$1,446,861	\$79	\$313,200	\$1,133,661	\$1,289,118	\$975,918	\$1,330,176	\$1,016,976
Other Miscellaneous Store Retailers-4539	\$8,979,993	\$492	\$3,583,579	\$5,396,414	\$8,000,957	\$4,417,378	\$8,255,784	\$4,672,205
Gift, Novelty and Souvenir Stores-45322	\$3,671,420	\$201	\$386,076	\$3,285,344	\$3,271,147	\$2,885,071	\$3,375,331	\$2,989,255
TOTALS	\$420,279,863	\$23,042	\$262,963,598	\$157,316,265	\$374,459,220	\$111,495,622	\$386,385,582	\$123,421,984

SOURCE: RCLCO; Iexpress/Claritas, Inc.; MWCOG, Round 7.1 Cooperative Forecasts

Exhibit 21

HOUSEHOLD RETAIL EXPENDITURES AND DEMAND-SUPPLY GAP ANALYSIS
CITY OF ALEXANDRIA, ARLINGTON COUNTY, AND MARKET AREAS
SEPTEMBER 2008

Retail Categories	Claritas Estimates				MWCOG HH Estimates			
	2008 Expenditures	2008 Avg. HH Expenditures	2008 Retail Sales Estimates	2008 Demand-Supply Gap	2008 Expenditures	2008 Demand-Supply Gap	2020 Expenditures	2020 Demand-Supply Gap
Bailey's Crossroads								
Major Comparison Retailers	\$73,271,579	\$7,353	\$178,017,209	(\$104,745,630)	\$83,128,867	(\$94,888,342)	\$91,837,634	(\$86,179,575)
Department Stores Excluding Leased Departments-4521	\$28,248,926	\$2,835	\$23,568,127	\$4,680,799	\$32,049,278	\$8,481,151	\$35,406,832	\$11,838,705
Radio, Television, Electronics Stores-443112	\$6,726,972	\$675	\$38,725,139	(\$31,998,167)	\$7,631,957	(\$31,093,182)	\$8,431,498	(\$30,293,641)
Household Appliances Stores-443111	\$1,632,085	\$164	\$9,093,378	(\$7,461,293)	\$1,851,651	(\$7,241,727)	\$2,045,634	(\$7,047,744)
Computer and Software Stores-44312	\$2,462,682	\$247	\$7,064,910	(\$4,602,228)	\$2,793,989	(\$4,270,921)	\$3,086,693	(\$3,978,217)
Office Supplies, Stationery Stores-45321	\$2,678,889	\$269	\$6,487,241	(\$3,808,352)	\$3,039,282	(\$3,447,959)	\$3,357,684	(\$3,129,557)
Home Furnishing Stores-4422	\$5,074,125	\$509	\$14,774,726	(\$9,700,601)	\$5,756,751	(\$9,017,975)	\$6,359,842	(\$8,414,884)
Furniture Stores-4421	\$6,785,986	\$681	\$40,579,595	(\$33,793,609)	\$7,698,911	(\$32,880,684)	\$8,505,466	(\$32,074,129)
Home Centers-44411	\$14,607,405	\$1,466	\$0	\$14,607,405	\$16,572,552	\$16,572,552	\$18,308,729	\$18,308,729
Sporting Goods Stores-45111	\$3,260,164	\$327	\$22,870,428	(\$19,610,264)	\$3,698,757	(\$19,171,671)	\$4,086,247	(\$18,784,181)
Book Stores-451211	\$1,794,345	\$180	\$14,853,665	(\$13,059,320)	\$2,035,740	(\$12,817,925)	\$2,249,008	(\$12,604,657)
In-Line Comparison Retailers	\$29,948,811	\$3,005	\$106,460,604	(\$76,511,793)	\$33,977,850	(\$72,482,754)	\$37,537,446	(\$68,923,158)
Clothing Stores-4481	\$17,569,611	\$1,763	\$74,228,614	(\$56,659,003)	\$19,933,266	(\$54,295,348)	\$22,021,519	(\$52,207,095)
Shoe Stores-4482	\$3,158,581	\$317	\$10,924,797	(\$7,766,216)	\$3,583,508	(\$7,341,289)	\$3,958,924	(\$6,965,873)
Jewelry Stores-44831	\$3,931,191	\$394	\$4,627,927	(\$696,736)	\$4,460,057	(\$167,870)	\$4,927,303	\$299,376
Luggage and Leather Goods Stores-44832	\$293,933	\$29	\$0	\$293,933	\$333,476	\$333,476	\$368,412	\$368,412
Camera and Photographic Equipment Stores-44313	\$439,488	\$44	\$0	\$439,488	\$498,613	\$498,613	\$550,848	\$550,848
Cosmetics, Beauty Supplies, Perfume Stores-44612	\$863,336	\$87	\$0	\$863,336	\$979,481	\$979,481	\$1,082,094	\$1,082,094
Hobby, Toys & Games Stores-45112	\$1,900,744	\$191	\$12,138,151	(\$10,237,407)	\$2,156,453	(\$9,981,698)	\$2,382,368	(\$9,755,783)
Sew/Needlework/Piece Goods Stores-45113	\$424,068	\$43	\$993,106	(\$569,038)	\$481,118	(\$511,988)	\$531,521	(\$461,585)
Musical Instrument and Supplies Stores-45114	\$591,200	\$59	\$3,548,009	(\$2,956,809)	\$670,735	(\$2,877,274)	\$741,002	(\$2,807,007)
Prerecorded Tapes, CDs, Record Stores-45122	\$776,659	\$78	\$0	\$776,659	\$881,144	\$881,144	\$973,454	\$973,454
Food & Beverage	\$44,757,903	\$4,492	\$81,027,028	(\$36,269,125)	\$50,779,222	(\$30,247,806)	\$56,098,967	(\$24,928,061)
Full-Service Restaurants-7221	\$22,516,280	\$2,260	\$56,408,605	(\$33,892,325)	\$25,545,414	(\$30,863,191)	\$28,221,609	(\$28,186,996)
Limited Service Eating Places-7222	\$19,826,481	\$1,990	\$24,618,423	(\$4,791,942)	\$22,493,755	(\$2,124,668)	\$24,850,251	\$231,828
Drinking Places Alcoholic Beverages-7224	\$2,415,142	\$242	\$0	\$2,415,142	\$2,740,053	\$2,740,053	\$3,027,107	\$3,027,107
Neighborhood Retailers	\$90,426,622	\$9,074	\$223,247,619	(\$132,820,997)	\$102,591,793	(\$120,655,826)	\$113,339,539	(\$109,908,080)
Supermarket, Grocery -44511	\$47,022,509	\$4,719	\$179,493,791	(\$132,471,282)	\$53,348,487	(\$126,145,304)	\$58,937,395	(\$120,556,396)
Pharmacies and Drug Stores-44611	\$21,512,455	\$2,159	\$17,772,527	\$3,739,928	\$24,406,544	\$6,634,017	\$26,963,428	\$9,190,901
Convenience Stores-44512	\$2,333,453	\$234	\$8,403,128	(\$6,069,675)	\$2,647,374	(\$5,755,754)	\$2,924,719	(\$5,478,409)
Specialty Food Stores-4452	\$1,597,374	\$160	\$950,289	\$647,085	\$1,812,270	\$861,981	\$2,002,128	\$1,051,839
Beer, Wine and Liquor Stores-4453	\$3,643,731	\$366	\$4,692,497	(\$1,048,766)	\$4,133,925	(\$558,572)	\$4,567,005	(\$425,492)
Optical Goods Stores-44613	\$860,472	\$86	\$569,635	\$290,837	\$976,232	\$406,597	\$1,078,504	\$508,869
Other Health and Personal Care Stores-44619	\$1,526,498	\$153	\$1,917,766	(\$391,268)	\$1,731,859	(\$185,907)	\$1,913,293	(\$4,473)
Paint and Wallpaper Stores-44412	\$930,145	\$93	\$1,602,840	(\$672,695)	\$1,055,278	(\$547,562)	\$1,165,832	(\$437,008)
Hardware Stores-44413	\$3,136,223	\$315	\$0	\$3,136,223	\$3,558,142	\$3,558,142	\$3,930,901	\$3,930,901
Florists-4531	\$836,892	\$84	\$62,639	\$774,253	\$949,480	\$886,841	\$1,048,949	\$986,310
Other Miscellaneous Store Retailers-4539	\$4,987,074	\$500	\$2,837,060	\$2,150,014	\$5,657,989	\$2,820,929	\$6,250,733	\$3,413,673
Gift, Novelty and Souvenir Stores-45322	\$2,039,796	\$205	\$4,945,447	(\$2,905,651)	\$2,314,212	(\$2,631,235)	\$2,556,653	(\$2,388,794)
TOTALS	\$238,404,915	\$23,924	\$588,752,460	(\$350,347,545)	\$270,477,733	(\$318,274,727)	\$298,813,586	(\$289,938,874)

SOURCE: RCLCO; Iexpress/Claritas, Inc.; MWCOG, Round 7.1 Cooperative Forecasts

Exhibit 21

HOUSEHOLD RETAIL EXPENDITURES AND DEMAND-SUPPLY GAP ANALYSIS
CITY OF ALEXANDRIA, ARLINGTON COUNTY, AND MARKET AREAS
SEPTEMBER 2008

Retail Categories	2008 Expenditures	Claritas Estimates			MWCOG HH Estimates			
		2008 Avg. HH Expenditures	2008 Retail Sales Estimates	2008 Demand-Supply Gap	2008 Expenditures	2008 Demand-Supply Gap	2020 Expenditures	2020 Demand-Supply Gap
Franconia								
Major Comparison Retailers	\$105,436,999	\$10,125	\$24,751,709	\$80,685,290	\$115,962,475	\$91,210,766	\$124,430,643	\$99,678,934
Department Stores Excluding Leased Departments-4521	\$36,911,911	\$3,544	\$6,952,566	\$29,959,345	\$40,596,722	\$33,644,156	\$43,561,301	\$36,608,735
Radio, Television, Electronics Stores-443112	\$8,807,554	\$846	\$0	\$8,807,554	\$9,686,787	\$9,686,787	\$10,394,165	\$10,394,165
Household Appliances Stores-443111	\$2,358,719	\$226	\$3,479,288	(\$1,120,569)	\$2,594,183	(\$885,105)	\$2,783,624	(\$695,664)
Computer and Software Stores-44312	\$3,304,177	\$317	\$4,771,459	(\$1,467,282)	\$3,634,024	(\$1,137,435)	\$3,899,398	(\$872,061)
Office Supplies, Stationery Stores-45321	\$3,724,169	\$358	\$2,241,048	\$1,483,121	\$4,095,942	\$1,854,894	\$4,395,049	\$2,154,001
Home Furnishing Stores-4422	\$8,247,302	\$792	\$5,158,109	\$3,089,193	\$9,070,607	\$3,912,498	\$9,732,988	\$4,574,879
Furniture Stores-4421	\$9,721,399	\$933	\$2,039,920	\$7,681,479	\$10,691,859	\$8,651,939	\$11,472,632	\$9,432,712
Home Centers-44411	\$25,351,426	\$2,434	\$0	\$25,351,426	\$27,882,187	\$27,882,187	\$29,918,286	\$29,918,286
Sporting Goods Stores-45111	\$4,551,035	\$437	\$0	\$4,551,035	\$5,005,352	\$5,005,352	\$5,370,868	\$5,370,868
Book Stores-451211	\$2,459,307	\$236	\$109,319	\$2,349,988	\$2,704,813	\$2,595,494	\$2,902,332	\$2,793,013
In-Line Comparison Retailers	\$39,564,485	\$3,799	\$25,816,253	\$13,748,232	\$43,514,095	\$17,697,842	\$46,691,715	\$20,875,462
Clothing Stores-4481	\$22,929,500	\$2,202	\$21,966,031	\$963,469	\$25,218,487	\$3,252,456	\$27,060,069	\$5,094,038
Shoe Stores-4482	\$3,817,325	\$367	\$195,614	\$3,621,711	\$4,198,398	\$4,002,784	\$4,504,986	\$4,309,372
Jewelry Stores-44831	\$5,821,790	\$559	\$925,584	\$4,896,206	\$6,402,963	\$5,477,379	\$6,870,540	\$5,944,956
Luggage and Leather Goods Stores-44832	\$426,393	\$41	\$0	\$426,393	\$468,959	\$468,959	\$503,204	\$503,204
Camera and Photographic Equipment Stores-44313	\$613,958	\$59	\$0	\$613,958	\$675,248	\$675,248	\$724,558	\$724,558
Cosmetics, Beauty Supplies, Perfume Stores-44612	\$977,238	\$94	\$530,214	\$447,024	\$1,074,793	\$544,579	\$1,153,280	\$623,066
Hobby, Toys & Games Stores-45112	\$2,631,768	\$253	\$459,617	\$2,172,151	\$2,894,490	\$2,434,873	\$3,105,860	\$2,646,243
Sew/Needlework/Piece Goods Stores-45113	\$595,386	\$57	\$638,666	(\$43,280)	\$654,822	\$16,156	\$702,640	\$63,974
Musical Instrument and Supplies Stores-45114	\$756,018	\$73	\$1,100,527	(\$344,509)	\$831,489	(\$269,038)	\$892,209	(\$208,318)
Prerecorded Tapes, CDs, Record Stores-45122	\$995,109	\$96	\$0	\$995,109	\$1,094,448	\$1,094,448	\$1,174,370	\$1,174,370
Food & Beverage	\$55,233,842	\$5,304	\$40,318,085	\$14,915,757	\$60,747,679	\$20,429,594	\$65,183,783	\$24,865,698
Full-Service Restaurants-7221	\$27,850,781	\$2,674	\$29,661,110	(\$1,810,329)	\$30,631,045	\$969,935	\$32,867,880	\$3,206,770
Limited Service Eating Places-7222	\$24,233,125	\$2,327	\$10,656,975	\$13,576,150	\$26,652,249	\$15,995,274	\$28,598,531	\$17,941,556
Drinking Places Alcoholic Beverages-7224	\$3,149,936	\$302	\$0	\$3,149,936	\$3,464,385	\$3,464,385	\$3,717,372	\$3,717,372
Neighborhood Retailers	\$106,832,417	\$10,259	\$74,284,166	\$32,548,251	\$117,497,193	\$43,213,027	\$126,077,435	\$51,793,269
Supermarket, Grocery -44511	\$53,133,284	\$5,102	\$55,356,979	(\$2,223,695)	\$58,437,429	\$3,080,450	\$62,704,826	\$7,347,847
Pharmacies and Drug Stores-44611	\$24,579,051	\$2,360	\$7,965,258	\$16,613,793	\$27,032,708	\$19,067,450	\$29,006,773	\$21,041,515
Convenience Stores-44512	\$2,722,140	\$261	\$6,302,077	(\$3,579,937)	\$2,993,883	(\$3,308,194)	\$3,212,512	(\$3,089,565)
Specialty Food Stores-4452	\$1,756,268	\$169	\$836,112	\$920,156	\$1,931,591	\$1,095,479	\$2,072,646	\$1,236,534
Beer, Wine and Liquor Stores-4453	\$4,413,843	\$424	\$0	\$4,413,843	\$4,854,464	\$4,854,464	\$5,208,962	\$5,208,962
Optical Goods Stores-44613	\$1,148,633	\$110	\$923,014	\$225,619	\$1,263,298	\$340,284	\$1,355,550	\$432,536
Other Health and Personal Care Stores-44619	\$1,703,131	\$164	\$0	\$1,703,131	\$1,873,150	\$1,873,150	\$2,009,937	\$2,009,937
Paint and Wallpaper Stores-44412	\$1,614,075	\$155	\$922,466	\$691,609	\$1,775,204	\$852,738	\$1,904,838	\$982,372
Hardware Stores-44413	\$5,044,693	\$484	\$0	\$5,044,693	\$5,548,290	\$5,548,290	\$5,953,455	\$5,953,455
Florists-4531	\$1,221,189	\$117	\$250,560	\$970,629	\$1,343,097	\$1,092,537	\$1,441,177	\$1,190,617
Other Miscellaneous Store Retailers-4539	\$6,642,234	\$638	\$1,057,485	\$5,584,749	\$7,305,309	\$6,247,824	\$7,838,780	\$6,781,295
Gift, Novelty and Souvenir Stores-45322	\$2,853,876	\$274	\$670,215	\$2,183,661	\$3,138,770	\$2,468,555	\$3,367,979	\$2,697,764
TOTALS	\$307,067,743	\$29,486	\$165,170,213	\$141,897,530	\$337,721,442	\$172,551,229	\$362,383,576	\$197,213,363

SOURCE: RCLCO; Iexpress/Claritas, Inc.; MWCOG, Round 7.1 Cooperative Forecasts

Exhibit 21

HOUSEHOLD RETAIL EXPENDITURES AND DEMAND-SUPPLY GAP ANALYSIS
CITY OF ALEXANDRIA, ARLINGTON COUNTY, AND MARKET AREAS
SEPTEMBER 2008

Retail Categories	Claritas Estimates				MWCOG HH Estimates			
	2008 Expenditures	2008 Avg. HH Expenditures	2008 Retail Sales Estimates	2008 Demand-Supply Gap	2008 Expenditures	2008 Demand-Supply Gap	2020 Expenditures	2020 Demand-Supply Gap
Huntington								
Major Comparison Retailers	\$70,766,442	\$10,806	\$69,311,005	\$1,455,437	\$92,697,664	\$23,386,659	\$101,238,478	\$31,927,473
Department Stores Excluding Leased Departments-4521	\$26,968,105	\$4,118	\$47,706,987	(\$20,738,882)	\$35,325,788	(\$12,381,199)	\$38,580,573	(\$9,126,414)
Radio, Television, Electronics Stores-443112	\$6,806,835	\$1,039	\$3,552,766	\$3,254,069	\$8,916,341	\$5,363,575	\$9,737,859	\$6,185,093
Household Appliances Stores-443111	\$1,565,263	\$239	\$0	\$1,565,263	\$2,050,354	\$2,050,354	\$2,239,265	\$2,239,265
Computer and Software Stores-44312	\$2,563,095	\$391	\$1,473,227	\$1,089,868	\$3,357,424	\$1,884,197	\$3,666,764	\$2,193,537
Office Supplies, Stationery Stores-45321	\$2,895,887	\$442	\$10,373,943	(\$7,478,056)	\$3,793,351	(\$6,580,592)	\$4,142,856	(\$6,291,087)
Home Furnishing Stores-4422	\$5,037,435	\$769	\$1,387,955	\$3,649,480	\$6,598,586	\$5,210,631	\$7,206,555	\$5,818,600
Furniture Stores-4421	\$7,037,136	\$1,075	\$917,045	\$6,120,091	\$9,218,014	\$8,300,969	\$10,067,327	\$9,150,282
Home Centers-44411	\$12,492,562	\$1,908	\$0	\$12,492,562	\$16,364,131	\$16,364,131	\$17,871,860	\$17,871,860
Sporting Goods Stores-45111	\$3,391,080	\$518	\$2,311,297	\$1,079,783	\$4,442,009	\$2,130,712	\$4,851,279	\$2,539,982
Book Stores-451211	\$2,009,044	\$307	\$1,587,785	\$421,259	\$2,631,667	\$1,043,882	\$2,874,139	\$1,286,354
In-Line Comparison Retailers	\$29,512,853	\$4,506	\$43,093,840	(\$13,580,987)	\$38,659,179	(\$4,434,661)	\$42,221,090	(\$872,750)
Clothing Stores-4481	\$16,869,897	\$2,576	\$24,809,169	(\$7,939,272)	\$22,098,045	(\$2,711,124)	\$24,134,076	(\$675,093)
Shoe Stores-4482	\$2,809,207	\$429	\$7,316,476	(\$4,507,269)	\$3,679,808	(\$3,636,668)	\$4,018,852	(\$3,297,624)
Jewelry Stores-44831	\$4,593,356	\$701	\$5,943,619	(\$1,350,263)	\$6,016,883	\$73,264	\$6,571,256	\$627,637
Luggage and Leather Goods Stores-44832	\$322,037	\$49	\$41,474	\$280,563	\$421,839	\$380,365	\$460,706	\$419,232
Camera and Photographic Equipment Stores-44313	\$452,016	\$69	\$279,755	\$172,261	\$592,100	\$312,345	\$646,654	\$366,899
Cosmetics, Beauty Supplies, Perfume Stores-44612	\$779,967	\$119	\$1,213,176	(\$433,209)	\$1,021,687	(\$191,489)	\$1,115,821	(\$97,355)
Hobby, Toys & Games Stores-45112	\$1,873,754	\$286	\$1,490,742	\$383,012	\$2,454,449	\$963,707	\$2,680,593	\$1,189,851
Sew/Needlework/Piece Goods Stores-45113	\$415,141	\$63	\$0	\$415,141	\$543,797	\$543,797	\$593,901	\$593,901
Musical Instrument and Supplies Stores-45114	\$594,206	\$91	\$506,801	\$87,405	\$778,356	\$271,555	\$850,071	\$343,270
Prerecorded Tapes, CDs, Record Stores-45122	\$803,272	\$123	\$1,492,628	(\$689,356)	\$1,052,214	(\$440,414)	\$1,149,161	(\$343,467)
Food & Beverage	\$46,279,581	\$7,067	\$62,534,848	(\$16,255,267)	\$60,622,082	(\$1,912,766)	\$66,207,573	\$3,672,725
Full-Service Restaurants-7221	\$23,385,995	\$3,571	\$20,052,008	\$3,333,987	\$33,333,547	\$10,581,539	\$33,456,007	\$13,403,999
Limited Service Eating Places-7222	\$20,138,765	\$3,075	\$42,027,192	(\$21,888,427)	\$26,379,968	(\$15,647,224)	\$28,810,519	(\$13,216,673)
Drinking Places Alcoholic Beverages-7224	\$2,754,821	\$421	\$455,648	\$2,299,173	\$3,608,567	\$3,152,919	\$3,941,047	\$3,485,399
Neighborhood Retailers	\$80,916,101	\$12,355	\$69,006,826	\$11,909,275	\$105,992,803	\$36,985,977	\$115,758,582	\$46,751,756
Supermarket, Grocery -44511	\$40,507,302	\$6,185	\$18,573,132	\$21,934,170	\$53,060,916	\$34,487,784	\$57,949,750	\$39,376,618
Pharmacies and Drug Stores-44611	\$19,519,243	\$2,980	\$24,242,728	(\$4,723,485)	\$25,568,450	\$1,325,722	\$27,924,231	\$3,681,503
Convenience Stores-44512	\$2,131,600	\$325	\$1,368,337	\$763,263	\$2,792,204	\$1,423,867	\$3,049,467	\$1,681,130
Specialty Food Stores-4452	\$1,331,659	\$203	\$2,406,849	(\$1,075,190)	\$1,744,353	(\$662,496)	\$1,905,071	(\$501,778)
Beer, Wine and Liquor Stores-4453	\$3,682,745	\$562	\$3,187,055	\$495,690	\$4,824,064	\$1,637,009	\$5,268,535	\$2,081,480
Optical Goods Stores-44613	\$811,232	\$124	\$3,069,458	(\$2,258,226)	\$1,062,641	(\$2,006,817)	\$1,160,549	(\$1,908,909)
Other Health and Personal Care Stores-44619	\$1,359,685	\$208	\$906,630	\$453,055	\$1,781,065	\$874,435	\$1,945,165	\$1,038,535
Paint and Wallpaper Stores-44412	\$771,401	\$118	\$0	\$771,401	\$1,010,466	\$1,010,466	\$1,103,566	\$1,103,566
Hardware Stores-44413	\$2,826,017	\$432	\$0	\$2,826,017	\$3,701,828	\$3,701,828	\$4,042,900	\$4,042,900
Florists-4531	\$792,507	\$121	\$793,871	(\$1,364)	\$1,038,113	\$244,242	\$1,133,761	\$339,890
Other Miscellaneous Store Retailers-4539	\$4,987,190	\$762	\$3,043,195	\$1,943,995	\$6,532,770	\$3,489,575	\$7,134,674	\$4,091,479
Gift, Novelty and Souvenir Stores-45322	\$2,195,520	\$335	\$11,415,571	(\$9,220,051)	\$2,875,933	(\$8,539,638)	\$3,140,911	(\$8,274,660)
TOTALS	\$227,474,977	\$34,734	\$243,946,519	(\$16,471,542)	\$297,971,727	\$54,025,208	\$325,425,723	\$81,479,204

SOURCE: RCLCO; Iexpress/Claritas, Inc.; MWCOG, Round 7.1 Cooperative Forecasts

Exhibit 21

HOUSEHOLD RETAIL EXPENDITURES AND DEMAND-SUPPLY GAP ANALYSIS
CITY OF ALEXANDRIA, ARLINGTON COUNTY, AND MARKET AREAS
SEPTEMBER 2008

Route 1/Hybla Valley Retail Categories	Claritas Estimates				MWCOG HH Estimates			
	2008 Expenditures	2008 Avg. HH Expenditures	2008 Retail Sales Estimates	2008 Demand-Supply Gap	2008 Expenditures	2008 Demand-Supply Gap	2020 Expenditures	2020 Demand-Supply Gap
Major Comparison Retailers	\$122,495,044	\$7,976	\$258,530,606	(\$136,035,562)	\$118,438,462	(\$140,092,144)	\$143,886,612	(\$114,643,994)
Department Stores Excluding Leased Departments-4521	\$44,969,907	\$2,928	\$62,738,412	(\$17,768,505)	\$43,480,670	(\$19,257,742)	\$52,823,097	(\$9,915,315)
Radio, Television, Electronics Stores-443112	\$10,662,847	\$694	\$11,544,605	(\$881,758)	\$10,309,733	(\$1,234,872)	\$12,524,923	\$980,318
Household Appliances Stores-443111	\$2,764,228	\$180	\$3,549,588	(\$785,360)	\$2,672,687	(\$876,901)	\$3,246,951	(\$302,637)
Computer and Software Stores-44312	\$3,912,828	\$255	\$553,827	\$3,359,001	\$3,783,250	\$3,229,423	\$4,596,133	\$4,042,306
Office Supplies, Stationery Stores-45321	\$4,333,264	\$282	\$4,953,892	(\$620,628)	\$4,189,762	(\$764,130)	\$5,089,991	\$136,099
Home Furnishing Stores-4422	\$9,014,711	\$587	\$9,462,069	(\$447,358)	\$8,716,177	(\$745,892)	\$10,588,969	\$1,126,900
Furniture Stores-4421	\$11,273,036	\$734	\$874,252	\$10,398,784	\$10,899,715	\$10,025,463	\$13,241,670	\$12,367,418
Home Centers-4441	\$27,499,969	\$1,791	\$160,910,559	(\$133,410,590)	\$26,589,272	(\$134,321,287)	\$32,302,347	(\$128,608,212)
Sporting Goods Stores-45111	\$5,220,112	\$340	\$1,890,897	\$3,329,215	\$5,047,241	\$3,156,344	\$6,131,711	\$4,240,814
Book Stores-451211	\$2,844,142	\$185	\$2,052,505	\$791,637	\$2,749,955	\$697,450	\$3,340,821	\$1,288,316
In-Line Comparison Retailers	\$47,281,600	\$3,079	\$30,075,808	\$17,205,792	\$45,715,809	\$15,640,001	\$55,538,486	\$25,462,678
Clothing Stores-4481	\$27,568,819	\$1,795	\$12,999,132	\$14,569,687	\$26,655,842	\$13,656,710	\$32,383,220	\$19,384,088
Shoe Stores-4482	\$4,797,590	\$312	\$2,302,215	\$2,495,375	\$4,638,712	\$2,336,497	\$5,635,403	\$3,333,188
Jewelry Stores-44831	\$6,455,768	\$420	\$925,584	\$5,530,184	\$6,241,977	\$5,316,393	\$7,583,152	\$6,657,568
Luggage and Leather Goods Stores-44832	\$480,624	\$31	\$147,866	\$332,758	\$464,708	\$316,842	\$564,556	\$416,690
Camera and Photographic Equipment Stores-44313	\$722,668	\$47	\$0	\$722,668	\$698,736	\$698,736	\$848,869	\$848,869
Cosmetics, Beauty Supplies, Perfume Stores-44612	\$1,333,409	\$87	\$133,657	\$1,199,752	\$1,289,251	\$1,155,594	\$1,566,265	\$1,432,608
Hobby, Toys & Games Stores-45112	\$3,089,709	\$201	\$11,720,229	(\$8,630,520)	\$2,987,389	(\$8,732,840)	\$3,629,271	(\$8,090,958)
Sew/Needlework/Piece Goods Stores-45113	\$698,573	\$45	\$227,778	\$470,795	\$675,439	\$447,661	\$820,566	\$592,788
Musical Instrument and Supplies Stores-45114	\$916,009	\$60	\$1,619,347	(\$703,338)	\$885,674	(\$733,673)	\$1,075,974	(\$543,373)
Prerecorded Tapes, CDs, Record Stores-45122	\$1,218,431	\$79	\$0	\$1,218,431	\$1,178,081	\$1,178,081	\$1,431,208	\$1,431,208
Food & Beverage	\$69,286,015	\$4,511	\$83,462,536	(\$14,176,521)	\$66,991,519	(\$16,471,017)	\$81,385,578	(\$2,076,958)
Full-Service Restaurants-7221	\$34,878,688	\$2,271	\$55,123,437	(\$20,244,749)	\$33,723,635	(\$21,399,802)	\$40,969,627	(\$14,153,810)
Limited Service Eating Places-7222	\$30,598,001	\$1,992	\$28,339,099	\$2,258,902	\$29,584,709	\$1,245,610	\$35,941,395	\$7,602,296
Drinking Places Alcoholic Beverages-7224	\$3,809,326	\$248	\$0	\$3,809,326	\$3,683,175	\$3,683,175	\$4,474,557	\$4,474,557
Neighborhood Retailers	\$140,847,899	\$9,171	\$216,760,416	(\$75,912,517)	\$136,183,539	(\$80,576,877)	\$165,444,465	(\$51,315,951)
Supermarket, Grocery -44511	\$71,871,849	\$4,680	\$157,963,075	(\$86,091,226)	\$69,491,720	(\$88,471,355)	\$84,422,982	(\$73,540,093)
Pharmacies and Drug Stores-44611	\$33,296,475	\$2,168	\$30,038,351	\$3,258,124	\$32,193,819	\$2,155,468	\$39,111,109	\$9,072,758
Convenience Stores-44512	\$3,648,885	\$238	\$14,957,254	(\$11,308,369)	\$3,528,047	(\$11,429,207)	\$4,286,097	(\$10,671,157)
Specialty Food Stores-4452	\$2,399,667	\$156	\$439,874	\$1,959,793	\$2,320,199	\$1,880,325	\$2,818,726	\$2,378,852
Beer, Wine and Liquor Stores-4453	\$5,681,071	\$370	\$0	\$5,681,071	\$5,492,935	\$5,492,935	\$6,673,168	\$6,673,168
Optical Goods Stores-44613	\$1,382,774	\$90	\$1,606,804	(\$224,030)	\$1,336,982	(\$269,822)	\$1,624,251	\$17,447
Other Health and Personal Care Stores-44619	\$2,344,483	\$153	\$1,077,191	\$1,267,292	\$2,266,842	\$1,189,651	\$2,753,905	\$1,676,714
Paint and Wallpaper Stores-44412	\$1,770,986	\$115	\$2,595,928	(\$824,942)	\$1,712,338	(\$883,590)	\$2,080,257	(\$515,671)
Hardware Stores-44413	\$5,640,151	\$367	\$372,192	\$5,267,959	\$5,453,370	\$5,081,178	\$6,625,102	\$6,252,910
Florists-4531	\$1,420,643	\$93	\$1,628,644	(\$208,001)	\$1,373,597	(\$255,047)	\$1,668,733	\$40,089
Other Miscellaneous Store Retailers-4539	\$8,083,554	\$526	\$4,133,665	\$3,949,889	\$7,815,857	\$3,682,192	\$9,495,202	\$5,361,537
Gift, Novelty and Souvenir Stores-45322	\$3,307,361	\$215	\$1,947,438	\$1,359,923	\$3,197,833	\$1,250,395	\$3,884,932	\$1,937,494
TOTALS	\$379,910,558	\$24,737	\$588,829,366	(\$208,918,808)	\$367,329,329	(\$221,500,037)	\$446,255,142	(\$142,574,224)

SOURCE: RCLCO; Ixpress/Claritas, Inc.; MWCOG, Round 7.1 Cooperative Forecasts

Exhibit 21

HOUSEHOLD RETAIL EXPENDITURES AND DEMAND-SUPPLY GAP ANALYSIS
CITY OF ALEXANDRIA, ARLINGTON COUNTY, AND MARKET AREAS
SEPTEMBER 2008

Retail Categories	Oxon Hill 2008 Expenditures	Claritas Estimates			MWCOG HH Estimates			
		2008 Avg. HH Expenditures	2008 Retail Sales Estimates	2008 Demand-Supply Gap	2008 Expenditures	2008 Demand-Supply Gap	2020 Expenditures	2020 Demand-Supply Gap
Major Comparison Retailers	\$65,219,666	\$6,126	\$128,685,538	(\$63,465,872)	\$73,065,385	(\$55,620,153)	\$87,679,589	(\$41,005,949)
Department Stores Excluding Leased Departments-4521	\$25,322,856	\$2,379	\$37,128,734	(\$11,805,878)	\$28,369,115	(\$8,759,619)	\$34,043,376	(\$3,085,358)
Radio, Television, Electronics Stores-443112	\$5,866,635	\$551	\$11,476,749	(\$5,610,114)	\$6,572,373	(\$4,904,376)	\$7,886,948	(\$3,589,801)
Household Appliances Stores-443111	\$1,550,984	\$146	\$0	\$1,550,984	\$1,737,562	\$1,737,562	\$2,085,102	\$2,085,102
Computer and Software Stores-44312	\$2,137,955	\$201	\$729,556	\$1,408,399	\$2,395,144	\$1,665,588	\$2,874,210	\$2,144,654
Office Supplies, Stationery Stores-45321	\$2,021,265	\$190	\$3,281,651	(\$1,260,386)	\$2,264,417	(\$1,017,234)	\$2,717,335	(\$564,316)
Home Furnishing Stores-4422	\$4,369,715	\$410	\$2,197,216	\$2,172,499	\$4,895,378	\$2,698,162	\$5,874,529	\$3,677,313
Furniture Stores-4421	\$5,713,956	\$537	\$1,905,949	\$3,808,007	\$6,401,327	\$4,495,378	\$7,681,691	\$5,775,742
Home Centers-44411	\$14,416,309	\$1,354	\$69,900,001	(\$55,483,692)	\$16,150,545	(\$53,749,456)	\$19,380,903	(\$50,519,098)
Sporting Goods Stores-45111	\$2,668,181	\$251	\$566,719	\$2,101,462	\$2,989,155	\$2,422,436	\$3,587,032	\$3,020,313
Book Stores-451211	\$1,151,810	\$108	\$1,498,963	(\$347,153)	\$1,290,369	(\$208,594)	\$1,548,463	\$49,500
In-Line Comparison Retailers	\$26,512,384	\$2,490	\$46,474,368	(\$19,961,984)	\$29,701,740	(\$16,772,628)	\$35,642,546	(\$10,831,822)
Clothing Stores-4481	\$15,851,803	\$1,489	\$26,732,668	(\$10,880,865)	\$17,758,725	(\$8,973,943)	\$21,310,743	(\$5,421,925)
Shoe Stores-4482	\$2,941,228	\$276	\$12,445,520	(\$9,504,292)	\$3,295,048	(\$9,150,472)	\$3,954,109	(\$8,491,411)
Jewelry Stores-44831	\$2,967,937	\$279	\$1,222,054	\$1,745,883	\$3,324,970	\$2,102,916	\$3,990,016	\$2,767,962
Luggage and Leather Goods Stores-44832	\$237,771	\$22	\$0	\$237,771	\$266,374	\$266,374	\$319,653	\$319,653
Camera and Photographic Equipment Stores-44313	\$403,704	\$38	\$0	\$403,704	\$452,268	\$452,268	\$542,729	\$542,729
Cosmetics, Beauty Supplies, Perfume Stores-44612	\$803,762	\$75	\$1,300,791	(\$497,029)	\$900,452	(\$400,339)	\$1,080,556	(\$220,235)
Hobby, Toys & Games Stores-45112	\$1,684,821	\$158	\$4,773,335	(\$3,088,514)	\$1,887,500	(\$2,885,835)	\$2,265,029	(\$2,508,306)
Sew/Needlework/Piece Goods Stores-45113	\$376,156	\$35	\$0	\$376,156	\$421,406	\$421,406	\$505,694	\$505,694
Musical Instrument and Supplies Stores-45114	\$501,690	\$47	\$0	\$501,690	\$562,042	\$562,042	\$674,459	\$674,459
Prerecorded Tapes, CDs, Record Stores-45122	\$743,512	\$70	\$0	\$743,512	\$832,954	\$832,954	\$999,558	\$999,558
Food & Beverage	\$36,480,840	\$3,427	\$30,397,427	\$6,083,413	\$40,869,369	\$10,471,942	\$49,043,874	\$18,646,447
Full-Service Restaurants-7221	\$18,266,748	\$1,716	\$8,154,586	\$10,112,162	\$20,464,180	\$12,309,594	\$24,557,331	\$16,402,745
Limited Service Eating Places-7222	\$16,460,209	\$1,546	\$22,242,841	(\$5,782,632)	\$18,440,320	(\$3,802,521)	\$22,128,668	(\$114,173)
Drinking Places Alcoholic Beverages-7224	\$1,753,883	\$165	\$0	\$1,753,883	\$1,964,870	\$1,964,870	\$2,357,874	\$2,357,874
Neighborhood Retailers	\$82,496,182	\$7,749	\$110,830,241	(\$28,334,059)	\$92,420,211	(\$18,410,030)	\$110,905,679	\$75,438
Supermarket, Grocery -44511	\$43,354,742	\$4,072	\$71,880,328	(\$28,525,586)	\$48,570,180	(\$23,310,148)	\$58,284,965	(\$13,595,363)
Pharmacies and Drug Stores-44611	\$19,905,021	\$1,870	\$14,222,445	\$5,682,576	\$22,299,532	\$6,759,782	\$26,759,782	\$12,537,337
Convenience Stores-44512	\$2,125,856	\$200	\$5,766,938	(\$3,641,082)	\$2,381,590	(\$3,385,348)	\$2,857,944	(\$2,908,994)
Specialty Food Stores-4452	\$1,489,526	\$140	\$1,122,314	\$367,212	\$1,668,711	\$546,397	\$2,002,479	\$880,165
Beer, Wine and Liquor Stores-4453	\$3,013,028	\$283	\$13,012,415	(\$9,999,387)	\$3,375,486	(\$9,636,929)	\$4,050,635	(\$8,961,780)
Optical Goods Stores-44613	\$773,927	\$73	\$410,195	\$363,732	\$867,028	\$456,833	\$1,040,447	\$630,252
Other Health and Personal Care Stores-44619	\$1,426,543	\$134	\$877,077	\$549,466	\$1,598,152	\$721,075	\$1,917,807	\$1,040,730
Paint and Wallpaper Stores-44412	\$844,339	\$79	\$1,580,248	(\$735,909)	\$945,910	(\$634,338)	\$1,135,107	(\$445,141)
Hardware Stores-44413	\$3,035,699	\$285	\$0	\$3,035,699	\$3,400,884	\$3,400,884	\$4,081,113	\$4,081,113
Florists-4531	\$749,857	\$70	\$0	\$749,857	\$840,062	\$840,062	\$1,008,088	\$1,008,088
Other Miscellaneous Store Retailers-4539	\$4,252,922	\$399	\$1,891,074	\$2,361,848	\$4,764,535	\$2,873,461	\$5,717,516	\$3,826,442
Gift, Novelty and Souvenir Stores-45322	\$1,524,722	\$143	\$67,207	\$1,457,515	\$1,708,141	\$1,640,934	\$2,049,796	\$1,982,589
TOTALS	\$210,709,072	\$19,792	\$316,387,574	(\$105,678,502)	\$236,056,704	(\$80,330,870)	\$283,271,687	(\$33,115,887)

SOURCE: RCLCO; Iexpress/Claritas, Inc.; MWCOG, Round 7.1 Cooperative Forecasts

Exhibit 21

HOUSEHOLD RETAIL EXPENDITURES AND DEMAND-SUPPLY GAP ANALYSIS
CITY OF ALEXANDRIA, ARLINGTON COUNTY, AND MARKET AREAS
SEPTEMBER 2008

SE Washington DC Retail Categories	Claritas Estimates				MWCOG HH Estimates			
	2008 Expenditures	2008 Avg. HH Expenditures	2008 Retail Sales Estimates	2008 Demand-Supply Gap	2008 Expenditures	2008 Demand-Supply Gap	2020 Expenditures	2020 Demand-Supply Gap
Major Comparison Retailers	\$146,914,457	\$4,480	\$12,054,145	\$134,860,312	\$153,120,230	\$141,066,085	\$170,165,945	\$158,111,800
Department Stores Excluding Leased Departments-4521	\$62,322,986	\$1,900	\$239,113	\$62,083,873	\$64,955,554	\$64,716,441	\$72,186,564	\$71,947,451
Radio, Television, Electronics Stores-443112	\$13,860,011	\$423	\$1,183,834	\$12,676,177	\$14,445,468	\$13,261,634	\$16,053,572	\$14,869,738
Household Appliances Stores-443111	\$3,541,326	\$108	\$0	\$3,541,326	\$3,690,914	\$3,690,914	\$4,101,796	\$4,101,796
Computer and Software Stores-44312	\$4,806,780	\$147	\$320,214	\$4,486,566	\$5,009,822	\$4,689,608	\$5,567,527	\$5,247,313
Office Supplies, Stationery Stores-45321	\$4,220,620	\$129	\$817,030	\$3,403,590	\$4,398,902	\$3,581,872	\$4,888,598	\$4,071,568
Home Furnishing Stores-4422	\$8,715,025	\$266	\$6,011,613	\$2,703,412	\$9,083,154	\$3,071,541	\$10,094,313	\$4,082,700
Furniture Stores-4421	\$13,026,235	\$397	\$3,377,575	\$9,648,660	\$13,576,473	\$10,198,898	\$15,087,838	\$11,710,263
Home Centers-44411	\$27,763,520	\$847	\$0	\$27,763,520	\$28,936,271	\$28,936,271	\$32,157,527	\$32,157,527
Sporting Goods Stores-45111	\$5,957,415	\$182	\$104,766	\$5,852,649	\$6,209,061	\$6,104,295	\$6,900,268	\$6,795,502
Book Stores-451211	\$2,700,539	\$82	\$0	\$2,700,539	\$2,814,612	\$2,814,612	\$3,127,941	\$3,127,941
In-Line Comparison Retailers	\$64,382,832	\$1,963	\$14,055,293	\$50,327,539	\$67,102,409	\$53,047,116	\$74,572,412	\$60,517,119
Clothing Stores-4481	\$39,259,607	\$1,197	\$7,048,581	\$32,211,026	\$40,917,961	\$33,869,380	\$45,473,048	\$38,424,467
Shoe Stores-4482	\$7,726,926	\$236	\$5,878,232	\$1,848,694	\$8,053,317	\$2,175,085	\$8,949,832	\$3,071,600
Jewelry Stores-44831	\$6,177,341	\$188	\$0	\$6,177,341	\$6,438,276	\$6,438,276	\$7,155,001	\$7,155,001
Luggage and Leather Goods Stores-44832	\$494,651	\$15	\$0	\$494,651	\$515,545	\$515,545	\$572,937	\$572,937
Camera and Photographic Equipment Stores-44313	\$921,041	\$28	\$0	\$921,041	\$959,946	\$959,946	\$1,066,810	\$1,066,810
Cosmetics, Beauty Supplies, Perfume Stores-44612	\$2,188,649	\$67	\$427,613	\$1,761,036	\$2,281,099	\$1,853,486	\$2,535,037	\$2,107,424
Hobby, Toys & Games Stores-45112	\$3,905,070	\$119	\$0	\$3,905,070	\$4,070,023	\$4,070,023	\$4,523,108	\$4,523,108
Sew/Needlework/Piece Goods Stores-45113	\$794,081	\$24	\$0	\$794,081	\$827,624	\$827,624	\$919,757	\$919,757
Musical Instrument and Supplies Stores-45114	\$1,155,034	\$35	\$418,501	\$736,533	\$1,203,823	\$785,322	\$1,337,836	\$919,335
Prerecorded Tapes, CDs, Record Stores-45122	\$1,760,432	\$54	\$282,366	\$1,478,066	\$1,834,794	\$1,552,428	\$2,039,048	\$1,756,682
Food & Beverage	\$90,940,770	\$2,773	\$26,277,632	\$64,663,138	\$94,782,174	\$68,504,542	\$105,333,555	\$79,055,923
Full-Service Restaurants-7221	\$45,409,213	\$1,385	\$11,856,281	\$33,552,932	\$47,327,331	\$35,471,050	\$52,595,924	\$40,739,643
Limited Service Eating Places-7222	\$41,469,345	\$1,265	\$14,421,351	\$27,047,994	\$43,221,040	\$28,799,689	\$48,032,511	\$33,611,160
Drinking Places Alcoholic Beverages-7224	\$4,062,212	\$124	\$0	\$4,062,212	\$4,233,803	\$4,233,803	\$4,705,120	\$4,705,120
Neighborhood Retailers	\$220,508,884	\$6,724	\$125,748,602	\$94,760,282	\$229,823,338	\$104,074,736	\$255,407,829	\$129,659,227
Supermarket, Grocery -44511	\$120,534,565	\$3,676	\$65,060,163	\$55,474,402	\$125,626,032	\$60,565,869	\$139,611,026	\$74,550,863
Pharmacies and Drug Stores-44611	\$53,897,501	\$1,644	\$36,191,156	\$17,706,345	\$56,174,170	\$19,983,014	\$62,427,615	\$26,236,459
Convenience Stores-44512	\$5,831,557	\$178	\$958,430	\$4,873,127	\$6,077,886	\$5,119,456	\$6,754,491	\$5,796,061
Specialty Food Stores-4452	\$4,191,752	\$128	\$2,672,442	\$1,519,310	\$4,368,815	\$1,696,373	\$4,855,162	\$2,182,720
Beer, Wine and Liquor Stores-4453	\$7,757,799	\$237	\$16,154,480	(\$8,396,681)	\$8,085,494	(\$8,068,986)	\$8,985,591	(\$7,168,889)
Optical Goods Stores-44613	\$1,760,361	\$54	\$788,872	\$971,489	\$1,834,720	\$1,045,848	\$2,038,965	\$1,250,093
Other Health and Personal Care Stores-44619	\$3,929,034	\$120	\$1,926,595	\$2,002,439	\$4,094,999	\$2,168,404	\$4,550,864	\$2,624,269
Paint and Wallpaper Stores-44412	\$1,623,806	\$50	\$0	\$1,623,806	\$1,692,397	\$1,692,397	\$1,880,798	\$1,880,798
Hardware Stores-44413	\$6,211,353	\$189	\$1,462,915	\$4,748,438	\$6,473,725	\$5,010,810	\$7,194,396	\$5,731,481
Florists-4531	\$1,624,035	\$50	\$180,051	\$1,443,984	\$1,692,635	\$1,512,584	\$1,881,064	\$1,701,013
Other Miscellaneous Store Retailers-4539	\$9,946,706	\$303	\$336,697	\$9,610,009	\$10,366,862	\$10,030,165	\$11,520,926	\$11,184,229
Gift, Novelty and Souvenir Stores-45322	\$3,200,415	\$98	\$16,801	\$3,183,614	\$3,335,603	\$3,318,802	\$3,706,930	\$3,690,129
TOTALS	\$522,746,943	\$15,941	\$178,135,672	\$344,611,271	\$544,828,151	\$366,692,479	\$605,479,741	\$427,344,069

SOURCE: RCLCO; Iexpress/Claritas, Inc.; MWCOG, Round 7.1 Cooperative Forecasts

Exhibit 21

HOUSEHOLD RETAIL EXPENDITURES AND DEMAND-SUPPLY GAP ANALYSIS
CITY OF ALEXANDRIA, ARLINGTON COUNTY, AND MARKET AREAS
SEPTEMBER 2008

Retail Categories	Claritas Estimates				MWCOG HH Estimates			
	2008 Expenditures	2008 Avg. HH Expenditures	2008 Retail Sales Estimates	2008 Demand-Supply Gap	2008 Expenditures	2008 Demand-Supply Gap	2020 Expenditures	2020 Demand-Supply Gap
Southern Downtown DC								
Major Comparison Retailers	\$123,802,571	\$6,380	\$126,576,127	(\$2,773,556)	\$147,501,519	\$20,925,392	\$199,892,093	\$73,315,966
Department Stores Excluding Leased Departments-4521	\$45,828,553	\$2,362	\$26,388,776	\$19,439,777	\$54,601,299	\$28,212,523	\$73,994,953	\$47,606,177
Radio, Television, Electronics Stores-443112	\$11,513,317	\$593	\$5,509,442	\$6,003,875	\$13,717,258	\$8,207,816	\$18,589,445	\$13,080,003
Household Appliances Stores-443111	\$2,875,793	\$148	\$589,112	\$2,286,681	\$3,426,293	\$2,837,181	\$4,643,266	\$4,054,154
Computer and Software Stores-44312	\$4,249,630	\$219	\$9,527,603	(\$5,277,973)	\$5,063,117	(\$4,464,486)	\$6,861,468	(\$2,666,135)
Office Supplies, Stationery Stores-45321	\$4,569,531	\$235	\$2,446,919	\$2,122,612	\$5,444,255	\$2,997,336	\$7,377,982	\$4,931,063
Home Furnishing Stores-4422	\$8,878,566	\$458	\$10,085,459	(\$1,206,893)	\$10,578,148	\$492,689	\$14,335,366	\$4,249,907
Furniture Stores-4421	\$11,889,484	\$613	\$7,211,311	\$4,678,173	\$14,165,432	\$6,954,121	\$19,196,805	\$11,985,494
Home Centers-44411	\$25,381,667	\$1,308	\$51,275,370	(\$25,893,703)	\$30,240,361	(\$21,035,009)	\$40,981,334	(\$10,294,036)
Sporting Goods Stores-45111	\$5,415,450	\$279	\$1,754,183	\$3,661,267	\$6,452,104	\$4,697,921	\$8,743,806	\$6,989,623
Book Stores-451211	\$3,200,580	\$165	\$11,787,952	(\$8,587,372)	\$3,813,252	(\$7,974,700)	\$5,167,668	(\$6,620,284)
In-Line Comparison Retailers	\$48,436,567	\$2,496	\$39,039,567	\$9,397,000	\$57,708,553	\$18,668,986	\$78,205,862	\$39,166,295
Clothing Stores-4481	\$27,634,049	\$1,424	\$28,400,576	(\$766,527)	\$32,923,906	\$4,523,330	\$44,618,039	\$16,217,463
Shoe Stores-4482	\$4,611,751	\$238	\$1,938,650	\$2,673,101	\$5,494,557	\$3,555,907	\$7,446,150	\$5,507,500
Jewelry Stores-44831	\$7,369,960	\$380	\$2,737,436	\$4,632,524	\$8,780,757	\$6,043,321	\$11,899,565	\$9,162,129
Luggage and Leather Goods Stores-44832	\$514,523	\$27	\$862,193	(\$347,670)	\$613,016	(\$249,177)	\$830,751	(\$31,442)
Camera and Photographic Equipment Stores-44313	\$750,499	\$39	\$1,709,158	(\$958,659)	\$894,164	(\$814,994)	\$1,211,758	(\$497,400)
Cosmetics, Beauty Supplies, Perfume Stores-44612	\$1,489,694	\$77	\$855,231	\$634,463	\$1,774,859	\$919,628	\$2,405,265	\$1,550,034
Hobby, Toys & Games Stores-45112	\$3,039,199	\$157	\$220,642	\$2,818,557	\$3,620,979	\$3,400,337	\$4,907,102	\$4,686,460
Sew/Needlework/Piece Goods Stores-45113	\$704,428	\$36	\$1,264,668	(\$560,240)	\$839,273	(\$425,395)	\$1,137,372	(\$127,296)
Musical Instrument and Supplies Stores-45114	\$966,672	\$50	\$1,051,013	(\$84,341)	\$1,151,718	\$100,705	\$1,560,792	\$509,779
Prerecorded Tapes, CDs, Record Stores-45122	\$1,355,792	\$70	\$0	\$1,355,792	\$1,615,325	\$1,615,325	\$2,189,067	\$2,189,067
Food & Beverage	\$76,876,783	\$3,961	\$253,711,858	(\$176,835,075)	\$91,592,947	(\$162,118,911)	\$124,125,541	(\$129,586,317)
Full-Service Restaurants-7221	\$38,815,930	\$2,000	\$82,160,880	(\$43,344,950)	\$46,246,282	(\$35,914,598)	\$62,672,345	(\$19,488,535)
Limited Service Eating Places-7222	\$33,551,142	\$1,729	\$155,964,928	(\$122,413,786)	\$39,973,681	(\$115,991,247)	\$54,171,799	(\$101,793,129)
Drinking Places Alcoholic Beverages-7224	\$4,509,711	\$232	\$15,586,050	(\$11,076,339)	\$5,372,984	(\$10,213,066)	\$7,281,396	(\$8,304,654)
Neighborhood Retailers	\$145,404,869	\$7,493	\$207,146,812	(\$61,741,943)	\$173,239,044	(\$33,907,768)	\$234,771,244	\$27,624,432
Supermarket, Grocery -44511	\$71,952,087	\$3,708	\$82,181,254	(\$10,229,167)	\$85,725,539	\$3,544,285	\$116,174,108	\$33,992,854
Pharmacies and Drug Stores-44611	\$36,725,405	\$1,892	\$81,922,998	(\$45,197,593)	\$43,755,578	(\$38,167,420)	\$59,296,976	(\$22,626,022)
Convenience Stores-44512	\$3,702,684	\$191	\$1,042,001	\$2,660,683	\$4,411,472	\$3,369,471	\$5,978,367	\$4,936,366
Specialty Food Stores-4452	\$2,377,912	\$123	\$3,716,223	(\$1,338,311)	\$2,833,105	(\$883,118)	\$3,839,386	\$123,163
Beer, Wine and Liquor Stores-4453	\$6,358,507	\$328	\$13,815,664	(\$7,457,157)	\$7,575,686	(\$6,239,978)	\$10,266,469	(\$3,549,195)
Optical Goods Stores-44613	\$1,422,934	\$73	\$3,347,678	(\$1,924,744)	\$1,695,320	(\$1,652,358)	\$2,297,475	(\$1,050,203)
Other Health and Personal Care Stores-44619	\$2,595,927	\$134	\$2,236,174	\$359,753	\$3,092,853	\$856,679	\$4,191,393	\$1,955,219
Paint and Wallpaper Stores-44412	\$1,576,614	\$81	\$702,874	\$873,740	\$1,878,418	\$1,175,544	\$2,545,607	\$1,842,733
Hardware Stores-44413	\$5,445,147	\$281	\$9,143,219	(\$3,698,072)	\$6,487,486	(\$2,655,733)	\$8,791,755	(\$351,464)
Florists-4531	\$1,438,757	\$74	\$871,079	\$567,678	\$1,714,172	\$843,093	\$2,323,022	\$1,451,943
Other Miscellaneous Store Retailers-4539	\$8,360,471	\$431	\$5,761,864	\$2,598,607	\$9,960,877	\$4,199,013	\$13,498,848	\$7,736,984
Gift, Novelty and Souvenir Stores-45322	\$3,448,424	\$178	\$2,405,784	\$1,042,640	\$4,108,540	\$1,702,756	\$5,567,838	\$3,162,054
TOTALS	\$394,520,790	\$20,330	\$626,474,364	(\$231,953,574)	\$470,042,063	(\$156,432,301)	\$636,994,739	\$10,520,375

SOURCE: RCLCO; Iexpress/Claritas, Inc.; MWCOG, Round 7.1 Cooperative Forecasts

Exhibit 22A

RETAIL EXPENDITURES SUMMARY, 2008 (MFCOG HOUSEHOLD DATA)
CITY OF ALEXANDRIA, ARLINGTON COUNTY, AND MARKET AREAS
OCTOBER 2008

Retail Categories	City of Alexandria	Arlington County	Mt. Vernon/Braddock	Crystal City/ Pentagon City	Old Town/ Carlyle	Western Alexandria	Shirlington/ Fairlington	Columbia Pike	Rosslyn/Ballston
Major Comparison Retailers	\$532,525,044	\$824,728,963	\$96,893,961	\$111,174,566	\$150,444,454	\$150,756,651	\$166,951,248	\$123,039,433	\$268,670,312
Department Stores Excluding Leased Departments-4521	\$199,795,877	\$308,415,388	\$36,166,321	\$42,948,541	\$54,333,802	\$57,275,560	\$61,103,664	\$48,401,846	\$101,928,368
Radio, Television, Electronics Stores-443112	\$49,799,717	\$76,563,317	\$8,861,114	\$11,004,975	\$13,599,810	\$14,287,109	\$15,182,781	\$11,735,827	\$26,262,264
Home Furnishing Stores-4422	\$38,456,919	\$60,107,442	\$7,116,176	\$7,802,598	\$11,670,107	\$10,480,878	\$12,260,262	\$8,175,793	\$18,988,586
Home Centers-44411	\$102,632,244	\$157,937,293	\$19,545,942	\$17,730,783	\$30,290,845	\$28,968,929	\$34,466,149	\$22,926,810	\$46,170,953
Book Stores-451211	\$14,303,253	\$23,240,816	\$2,406,163	\$3,413,400	\$4,097,907	\$4,012,599	\$4,553,302	\$3,084,303	\$8,176,200
In-Line Comparison Retailers	\$217,954,564	\$339,469,365	\$39,773,651	\$47,424,062	\$60,046,125	\$61,579,054	\$66,608,147	\$52,184,419	\$113,431,948
Clothing Stores-4481	\$125,487,706	\$195,848,544	\$23,138,876	\$26,964,470	\$34,066,107	\$35,610,470	\$38,330,103	\$30,832,760	\$64,812,997
Food & Beverage	\$331,270,953	\$506,707,221	\$56,985,319	\$75,192,566	\$88,442,116	\$97,459,150	\$100,559,617	\$79,390,067	\$179,334,787
Full-Service Restaurants-7221	\$167,313,563	\$255,981,427	\$28,757,530	\$38,021,318	\$44,797,623	\$49,157,166	\$50,821,891	\$39,957,389	\$90,681,070
Limited Service Eating Places-7222	\$144,413,711	\$220,693,527	\$24,919,757	\$32,643,577	\$38,091,068	\$42,729,708	\$43,716,343	\$35,101,053	\$77,856,561
Drinking Places Alcoholic Beverages-7224	\$19,543,679	\$30,032,267	\$3,308,033	\$4,527,670	\$5,553,424	\$5,572,276	\$6,021,382	\$4,331,626	\$10,797,156
Neighborhood Retailers	\$593,302,444	\$896,979,315	\$105,057,893	\$127,285,980	\$150,768,946	\$178,303,895	\$178,709,569	\$154,479,325	\$294,856,567
Supermarket, Grocery -44511	\$297,902,842	\$449,881,409	\$53,611,929	\$62,805,830	\$72,721,507	\$90,491,595	\$88,838,364	\$81,182,034	\$146,917,639
Pharmacies and Drug Stores-44611	\$140,538,283	\$210,309,597	\$23,978,576	\$31,375,277	\$36,172,391	\$42,574,662	\$41,898,445	\$35,940,642	\$69,351,897
TOTALS	\$1,675,053,005	\$2,567,884,865	\$298,710,824	\$361,077,173	\$449,701,640	\$488,098,750	\$512,828,581	\$409,093,244	\$856,293,614

Retail Categories	Far Western Alexandria	Bailey's Crossroads	Franconia	Huntington	Route 1/ Hybla Valley	Oxon Hill	SE Washington DC	Southern Downtown DC	MARKET AREAS
Major Comparison Retailers	\$114,009,640	\$83,128,867	\$115,962,475	\$92,697,664	\$118,438,462	\$73,065,385	\$153,120,230	\$147,501,519	\$1,965,854,867
Department Stores Excluding Leased Departments-4521	\$44,683,286	\$32,049,278	\$40,596,722	\$35,325,788	\$43,480,670	\$28,369,115	\$64,955,554	\$54,601,299	\$746,219,815
Radio, Television, Electronics Stores-443112	\$10,839,962	\$7,631,957	\$9,686,787	\$8,916,341	\$10,309,733	\$6,572,373	\$14,445,468	\$13,717,258	\$183,053,759
Home Furnishing Stores-4422	\$7,720,554	\$5,756,751	\$9,070,607	\$6,598,586	\$8,716,177	\$4,895,378	\$9,083,154	\$10,578,148	\$138,913,756
Home Centers-44411	\$20,957,297	\$16,572,552	\$27,882,187	\$16,364,131	\$26,589,272	\$16,150,545	\$28,936,271	\$30,240,361	\$383,793,025
Book Stores-451211	\$2,953,242	\$2,035,740	\$2,704,813	\$2,631,667	\$2,749,955	\$1,290,369	\$2,814,612	\$3,813,252	\$50,737,523
In-Line Comparison Retailers	\$48,195,494	\$33,977,850	\$43,514,095	\$38,659,179	\$45,715,809	\$29,701,740	\$67,102,409	\$57,708,553	\$805,622,534
Clothing Stores-4481	\$28,309,012	\$19,933,266	\$25,218,487	\$22,098,045	\$26,655,842	\$17,758,725	\$40,917,961	\$32,923,906	\$467,571,026
Food & Beverage	\$72,319,072	\$50,779,222	\$60,747,679	\$60,622,082	\$66,991,519	\$40,869,369	\$94,782,174	\$91,592,947	\$1,216,067,686
Full-Service Restaurants-7221	\$36,400,705	\$25,545,414	\$30,631,045	\$30,633,547	\$33,723,635	\$20,464,180	\$47,327,331	\$46,246,282	\$613,166,127
Limited Service Eating Places-7222	\$31,972,243	\$22,493,755	\$26,652,249	\$26,379,968	\$29,584,709	\$18,440,320	\$43,221,040	\$39,973,681	\$533,776,030
Drinking Places Alcoholic Beverages-7224	\$3,946,125	\$2,740,053	\$3,464,385	\$3,608,567	\$3,683,175	\$1,964,870	\$4,233,803	\$5,372,984	\$69,125,529
Neighborhood Retailers	\$139,935,013	\$102,591,793	\$117,497,193	\$105,992,803	\$136,183,539	\$92,420,211	\$229,823,338	\$173,239,044	\$2,287,145,109
Supermarket, Grocery -44511	\$72,828,798	\$53,348,487	\$58,437,429	\$53,060,916	\$69,491,720	\$48,570,180	\$125,626,032	\$85,725,539	\$1,163,657,999
Pharmacies and Drug Stores-44611	\$32,911,176	\$24,406,544	\$27,032,708	\$25,568,450	\$32,193,819	\$22,299,532	\$43,755,578	\$43,755,578	\$545,633,868
TOTALS	\$374,459,220	\$270,477,733	\$337,721,442	\$297,971,727	\$367,329,329	\$236,056,704	\$544,828,151	\$470,042,063	\$6,274,690,196

SOURCE: RCLCO; Iexpress/Claritas, Inc.; MFCOG, Round 7.1 Cooperative Forecasts

Exhibit 22B

RETAIL EXPENDITURES SUMMARY, 2020 (MFCOG HOUSEHOLD DATA)
CITY OF ALEXANDRIA, ARLINGTON COUNTY, AND MARKET AREAS
OCTOBER 2008

Retail Categories	City of Alexandria	Arlington County	Mt. Vernon/Braddock	Crystal City/ Pentagon City	Old Town/ Carlyle	Western Alexandria	Shirlington/ Fairlington	Columbia Pike	Rosslyn/Ballston
Major Comparison Retailers	\$606,754,136	\$954,627,710	\$103,993,660	\$197,906,479	\$197,906,479	\$172,935,045	\$174,309,218	\$142,976,073	\$324,439,507
Department Stores Excluding Leased Departments-4521	\$227,645,584	\$356,992,283	\$38,816,331	\$71,474,961	\$71,474,961	\$65,701,589	\$63,796,659	\$56,244,618	\$123,086,132
Radio, Television, Electronics Stores-443112	\$56,741,339	\$88,622,405	\$9,510,394	\$17,890,261	\$17,890,261	\$16,388,941	\$15,851,925	\$13,637,437	\$31,713,650
Home Furnishing Stores-4422	\$43,817,459	\$69,574,651	\$7,637,598	\$15,351,778	\$15,351,778	\$12,022,761	\$12,800,603	\$9,500,554	\$22,930,139
Home Centers-44411	\$116,938,235	\$182,813,171	\$20,978,129	\$39,846,962	\$39,846,962	\$33,230,660	\$35,985,160	\$26,641,746	\$55,754,881
Book Stores-451211	\$16,296,995	\$26,901,356	\$2,582,469	\$5,390,710	\$5,390,710	\$4,602,907	\$4,753,978	\$3,584,067	\$9,873,373
In-Line Comparison Retailers	\$248,335,425	\$392,937,409	\$42,687,981	\$78,989,400	\$78,989,400	\$70,638,187	\$69,543,739	\$60,640,099	\$136,977,565
Clothing Stores-4481	\$142,979,538	\$226,695,624	\$24,834,328	\$44,813,239	\$44,813,239	\$40,849,263	\$40,019,409	\$35,828,733	\$78,266,543
Food & Beverage	\$377,447,076	\$586,516,026	\$61,160,797	\$116,343,722	\$116,343,722	\$111,796,743	\$104,991,537	\$92,254,002	\$216,560,176
Full-Service Restaurants-7221	\$190,635,534	\$296,299,723	\$30,864,677	\$58,930,320	\$58,930,320	\$56,388,867	\$53,061,743	\$46,431,867	\$109,504,178
Limited Service Eating Places-7222	\$164,543,654	\$255,453,811	\$26,745,699	\$50,107,990	\$50,107,990	\$49,015,840	\$45,643,034	\$40,788,637	\$94,017,624
Drinking Places Alcoholic Beverages-7224	\$22,267,888	\$34,762,492	\$3,550,422	\$7,305,411	\$7,305,411	\$6,392,035	\$6,286,760	\$5,033,499	\$13,038,373
Neighborhood Retailers	\$676,003,346	\$1,038,257,837	\$112,755,787	\$198,333,341	\$198,333,341	\$204,534,871	\$186,585,759	\$179,510,314	\$356,061,369
Supermarket, Grocery -44511	\$339,427,757	\$520,739,878	\$57,540,229	\$95,663,596	\$95,663,596	\$103,804,163	\$92,753,699	\$94,336,329	\$177,414,043
Pharmacies and Drug Stores-44611	\$160,128,027	\$243,434,362	\$25,735,556	\$47,584,011	\$47,584,011	\$48,837,985	\$43,745,017	\$41,764,268	\$83,747,605
TOTALS	\$1,908,539,983	\$2,972,338,983	\$320,598,226	\$591,572,941	\$591,572,941	\$559,904,845	\$535,430,253	\$475,380,489	\$1,034,038,617

Retail Categories	Far Western Alexandria	Bailey's Crossroads	Franconia	Huntington	Route 1/ Hybla Valley	Oxon Hill	SE Washington DC	Southern DOWNTOWN DC	TOTAL OF MARKET AREAS
Major Comparison Retailers	\$117,640,798	\$91,837,634	\$124,430,643	\$101,238,478	\$143,886,612	\$87,679,589	\$170,165,945	\$199,892,093	\$2,351,238,254
Department Stores Excluding Leased Departments-4521	\$46,106,429	\$35,406,832	\$43,561,301	\$38,580,573	\$52,823,097	\$34,043,376	\$72,186,564	\$73,994,953	\$887,298,376
Radio, Television, Electronics Stores-443112	\$11,185,210	\$8,431,498	\$10,394,165	\$9,737,859	\$12,524,923	\$7,886,948	\$16,053,572	\$18,589,445	\$217,686,489
Home Furnishing Stores-4422	\$7,966,450	\$6,359,842	\$9,732,988	\$7,206,555	\$10,588,969	\$5,874,529	\$10,094,313	\$14,335,366	\$167,754,222
Home Centers-44411	\$21,624,777	\$18,308,729	\$29,918,286	\$17,871,860	\$32,302,347	\$19,380,903	\$32,157,527	\$40,981,334	\$464,830,264
Book Stores-451211	\$3,047,301	\$2,249,008	\$2,902,332	\$2,874,139	\$3,340,821	\$1,548,463	\$3,127,941	\$5,167,668	\$60,435,888
In-Line Comparison Retailers	\$49,730,499	\$37,537,446	\$46,691,715	\$42,221,090	\$55,538,486	\$35,642,546	\$74,572,412	\$78,205,862	\$958,606,426
Clothing Stores-4481	\$29,210,642	\$22,021,519	\$27,060,069	\$24,134,076	\$32,383,220	\$21,310,743	\$45,473,048	\$44,618,039	\$555,636,111
Food & Beverage	\$74,622,403	\$56,098,967	\$65,183,783	\$66,207,573	\$81,385,578	\$49,043,874	\$105,333,555	\$124,125,541	\$1,441,451,972
Full-Service Restaurants-7221	\$37,560,051	\$28,221,609	\$32,867,880	\$33,456,007	\$40,969,627	\$24,557,331	\$52,595,924	\$62,672,345	\$727,012,746
Limited Service Eating Places-7222	\$32,990,545	\$24,850,251	\$28,598,531	\$28,810,519	\$35,941,395	\$22,128,668	\$48,032,511	\$54,171,799	\$631,951,034
Drinking Places Alcoholic Beverages-7224	\$4,071,807	\$3,027,107	\$3,717,372	\$3,941,047	\$4,474,557	\$2,357,874	\$4,705,120	\$7,281,396	\$82,488,192
Neighborhood Retailers	\$144,391,882	\$113,339,539	\$126,077,435	\$115,758,582	\$165,444,465	\$110,905,679	\$255,407,829	\$234,771,244	\$2,702,211,436
Supermarket, Grocery -44511	\$75,148,363	\$58,937,395	\$62,704,826	\$57,949,750	\$84,422,982	\$58,284,965	\$139,611,026	\$116,174,108	\$1,370,409,071
Pharmacies and Drug Stores-44611	\$33,959,383	\$26,963,428	\$29,006,773	\$27,924,231	\$39,111,109	\$26,759,782	\$62,427,615	\$59,296,976	\$644,447,751
TOTALS	\$386,385,582	\$298,813,586	\$362,383,576	\$325,425,723	\$446,255,142	\$283,271,687	\$605,479,741	\$636,994,739	\$7,453,508,088

SOURCE: RCLCO; Iexpress/Claritas, Inc.; MFCOG, Round 7.1 Cooperative Forecasts

Exhibit 23A

HOUSEHOLD RETAIL DEMAND-SUPPLY GAP ANALYSIS SUMMARY, 2008 (MWCOG HOUSEHOLD DATA)
CITY OF ALEXANDRIA, ARLINGTON COUNTY, AND MARKET AREAS
OCTOBER 2008

Retail Categories	City of Alexandria	Arlington County	Mt. Vernon/Braddock	Crystal City/ Pentagon City	Old Town/ Carlyle	Western Alexandria	Shirlington/ Fairlington	Columbia Pike	Rosslyn/Ballston
Major Comparison Retailers	(\$235,757,450)	\$233,555,956	(\$70,002,079)	(\$229,140,885)	(\$101,255,491)	(\$156,900,096)	\$135,904,642	\$94,759,488	\$74,538,200
Department Stores Excluding Leased Departments-4521	(\$96,402,123)	(\$22,244,608)	(\$75,800,624)	(\$204,578,671)	\$20,451,691	(\$67,662,294)	\$52,448,613	\$30,492,208	\$36,705,222
Radio, Television, Electronics Stores-443112	(\$9,683,278)	\$7,440,332	(\$1,238,527)	(\$40,186,759)	(\$9,921,374)	(\$11,548,316)	\$9,089,221	\$8,097,621	\$18,093,232
Home Furnishing Stores-4422	(\$76,674,054)	(\$26,540,560)	\$343,772	(\$12,421,878)	(\$60,979,393)	(\$24,111,754)	\$11,054,611	\$7,779,233	(\$39,503,771)
Home Centers-44411	\$18,778,243	\$157,937,293	\$19,545,942	\$17,730,783	\$17,640,455	(\$42,234,682)	\$34,466,149	\$22,926,810	\$46,170,953
Book Stores-451211	(\$608,745)	\$4,742,810	(\$3,800,561)	(\$656,159)	(\$1,530,290)	\$2,583,181	\$2,272,433	\$3,084,303	(\$3,193,535)
In-Line Comparison Retailers	\$23,247,579	(\$186,832,635)	(\$7,600,767)	(\$349,058,610)	(\$34,894,337)	\$14,558,163	\$55,889,167	\$37,540,766	\$18,004,200
Clothing Stores-4481	\$583,717	(\$199,838,438)	(\$17,431,728)	(\$281,868,752)	(\$27,140,234)	\$16,545,635	\$31,031,936	\$19,708,790	(\$855,853)
Food & Beverage	(\$9,314,049)	(\$28,224,771)	(\$8,442,309)	(\$109,965,907)	(\$69,944,720)	\$48,000,705	(\$6,623,820)	\$45,555,493	(\$41,124,127)
Full-Service Restaurants-7221	(\$69,222,429)	(\$49,271,575)	(\$17,961,298)	(\$91,405,952)	(\$59,160,711)	\$19,932,260	(\$30,807,088)	\$22,049,215	(\$11,883,943)
Limited Service Eating Places-7222	\$40,364,701	\$3,979,537	\$6,210,957	(\$20,050,779)	(\$16,337,434)	\$22,496,169	\$18,161,885	\$19,174,653	(\$30,109,187)
Drinking Places Alcoholic Beverages-7224	\$19,543,679	\$17,067,267	\$3,308,033	\$1,490,823	\$5,553,424	\$5,572,276	\$6,021,382	\$4,331,626	\$869,003
Neighborhood Retailers	\$12,838,463	(\$43,139,647)	(\$12,393,780)	(\$20,372,890)	(\$41,997,415)	\$29,802,531	\$17,916,313	\$51,250,356	(\$76,921,929)
Supermarket, Grocery -44511	(\$25,061,146)	(\$73,315,554)	(\$36,722,091)	(\$2,692,028)	(\$6,750,285)	\$24,106,776	(\$27,584,685)	\$32,720,187	(\$65,090,718)
Pharmacies and Drug Stores-44611	\$23,666,270	\$51,523,590	\$16,482,163	\$3,562,434	(\$6,021,681)	(\$6,811,282)	\$29,215,648	\$7,622,123	\$7,657,977
TOTALS	(\$208,985,457)	(\$24,641,096)	(\$98,438,935)	(\$708,538,293)	(\$248,091,964)	(\$64,538,697)	\$203,086,302	\$229,106,103	(\$25,503,656)

Retail Categories	Far Western Alexandria	Bailey's Crossroads	Franconia	Huntington	Route 1/ Hybla Valley	Oxon Hill	SE Washington DC	Southern Downtown DC	TOTAL OF MARKET AREAS
Major Comparison Retailers	\$7,922,383	(\$94,888,342)	\$91,210,766	\$23,386,659	(\$140,092,144)	(\$55,620,153)	\$141,066,085	\$20,925,392	(\$258,185,575)
Department Stores Excluding Leased Departments-4521	\$11,643,385	\$8,481,151	\$33,644,156	(\$12,381,199)	(\$19,257,742)	(\$8,759,619)	\$64,716,441	\$28,212,523	(\$101,644,758)
Radio, Television, Electronics Stores-443112	(\$7,280,544)	(\$31,093,182)	\$9,686,787	\$5,363,575	(\$1,234,872)	(\$4,904,376)	\$13,261,634	\$8,207,816	(\$35,608,064)
Home Furnishing Stores-4422	(\$3,308,727)	(\$9,017,975)	\$3,912,498	\$5,210,631	(\$745,892)	\$2,698,162	\$3,071,541	\$492,689	(\$115,526,252)
Home Centers-44411	\$20,957,297	\$16,572,552	\$27,882,187	\$16,364,131	(\$134,321,287)	(\$53,749,456)	\$28,936,271	(\$21,035,009)	\$17,853,094
Book Stores-451211	\$1,010,072	(\$12,817,925)	\$2,595,494	\$1,043,882	\$697,450	(\$208,594)	\$2,814,612	(\$7,974,700)	(\$14,080,338)
In-Line Comparison Retailers	\$32,470,298	(\$72,482,754)	\$17,697,842	(\$4,434,661)	\$15,640,001	(\$16,772,628)	\$53,047,116	\$18,668,986	(\$221,727,219)
Clothing Stores-4481	\$20,024,044	(\$54,295,348)	\$3,252,456	(\$2,711,124)	\$13,656,710	(\$8,973,943)	\$33,869,380	\$4,523,330	(\$250,664,702)
Food & Beverage	\$47,553,436	(\$30,247,806)	\$20,429,594	(\$1,912,766)	(\$16,471,017)	\$10,471,942	\$68,504,542	(\$162,118,911)	(\$206,335,671)
Full-Service Restaurants-7221	\$27,838,539	(\$30,863,191)	\$969,935	\$10,581,539	(\$21,399,802)	\$12,309,594	\$35,471,050	(\$35,914,598)	(\$170,244,450)
Limited Service Eating Places-7222	\$15,768,773	(\$2,124,668)	\$15,995,274	(\$15,647,224)	\$1,245,610	(\$3,802,521)	\$28,799,689	(\$115,991,247)	(\$76,210,052)
Drinking Places Alcoholic Beverages-7224	\$3,946,125	\$2,740,053	\$3,464,385	\$3,152,919	\$3,683,175	\$1,964,870	\$4,233,803	(\$10,213,066)	\$40,118,831
Neighborhood Retailers	\$23,549,504	(\$120,655,826)	\$43,213,027	\$36,985,977	(\$80,576,877)	(\$18,410,030)	\$104,074,736	(\$33,907,768)	(\$98,444,071)
Supermarket, Grocery -44511	\$21,023,279	(\$126,145,304)	\$3,080,450	\$34,487,784	(\$88,471,355)	(\$23,310,148)	\$60,565,869	\$3,544,285	(\$197,237,984)
Pharmacies and Drug Stores-44611	\$17,373,730	\$6,634,017	\$19,067,450	\$1,325,722	\$2,155,468	\$8,077,087	\$19,983,014	(\$38,167,420)	\$88,156,451
TOTALS	\$111,495,622	(\$318,274,727)	\$172,551,229	\$54,025,208	(\$221,500,037)	(\$80,330,870)	\$366,692,479	(\$156,432,301)	(\$784,692,536)

SOURCE: RCLCO; Iexpress/Claritas, Inc.; MWCOG, Round 7.1 Cooperative Forecasts

Exhibit 23B

HOUSEHOLD RETAIL DEMAND-SUPPLY GAP ANALYSIS SUMMARY, 2020 (MWCOG HOUSEHOLD DATA)
CITY OF ALEXANDRIA, ARLINGTON COUNTY, AND MARKET AREAS
OCTOBER 2008

Retail Categories	City of Alexandria	Arlington County	Mt. Vernon/Braddock	Crystal City/ Pentagon City	Old Town/ Carlyle	Western Alexandria	Shirlington/ Fairlington	Columbia Pike	Rosslyn/Ballston
Major Comparison Retailers	(\$161,528,358)	\$363,454,703	(\$62,902,380)	(\$53,793,466)	(\$53,793,466)	(\$134,721,702)	\$143,262,612	\$114,696,128	\$130,307,395
Department Stores Excluding Leased Departments-4521	(\$68,552,416)	\$26,332,287	(\$73,150,614)	\$37,592,850	\$37,592,850	(\$59,236,265)	\$55,141,608	\$38,334,980	\$57,862,986
Radio, Television, Electronics Stores-443112	(\$2,741,656)	\$19,499,420	(\$589,247)	(\$5,630,923)	(\$5,630,923)	(\$9,446,484)	\$9,758,365	\$9,999,231	\$23,544,618
Home Furnishing Stores-4422	(\$71,313,514)	(\$17,073,351)	\$865,194	(\$57,297,722)	(\$57,297,722)	(\$22,569,871)	\$11,594,952	\$9,103,994	(\$35,562,218)
Home Centers-44411	\$33,084,234	\$182,813,171	\$20,978,129	\$27,196,572	\$27,196,572	(\$37,972,951)	\$35,985,160	\$26,641,746	\$55,754,881
Book Stores-451211	\$1,384,997	\$8,403,350	(\$3,624,255)	(\$237,487)	(\$237,487)	\$3,173,489	\$2,473,109	\$3,584,067	(\$1,496,362)
In-Line Comparison Retailers	\$53,628,440	(\$133,364,591)	(\$4,686,437)	(\$15,951,062)	(\$15,951,062)	\$23,617,296	\$58,824,759	\$45,996,446	\$41,549,817
Clothing Stores-4481	\$18,075,549	(\$168,991,358)	(\$15,736,276)	(\$16,393,102)	(\$16,393,102)	\$21,784,428	\$32,721,242	\$24,704,763	\$12,597,693
Food & Beverage	\$36,862,074	\$51,584,034	(\$4,266,831)	(\$42,043,114)	(\$42,043,114)	\$62,338,298	(\$2,191,900)	\$58,419,428	(\$3,898,738)
Full-Service Restaurants-7221	(\$45,900,458)	(\$8,953,279)	(\$15,854,151)	(\$45,028,014)	(\$45,028,014)	\$27,163,961	(\$28,567,236)	\$28,523,693	\$6,939,165
Limited Service Eating Places-7222	\$60,494,644	\$38,739,821	\$8,036,899	(\$4,320,512)	(\$4,320,512)	\$20,882,301	\$24,862,237	\$24,862,237	(\$13,948,124)
Drinking Places Alcoholic Beverages-7224	\$22,267,888	\$21,797,492	\$3,550,422	\$7,305,411	\$7,305,411	\$6,392,035	\$6,286,760	\$5,033,499	\$3,110,220
Neighborhood Retailers	\$95,539,365	\$98,138,875	(\$4,695,886)	\$5,566,980	\$5,566,980	\$56,033,507	\$25,792,503	\$76,281,345	(\$15,717,127)
Supermarket, Grocery -44511	\$16,463,769	(\$2,457,085)	(\$32,793,791)	\$16,191,804	\$16,191,804	\$37,419,344	(\$23,669,350)	\$45,874,482	(\$34,594,314)
Pharmacies and Drug Stores-44611	\$43,256,014	\$84,648,355	\$18,239,143	\$5,389,939	\$5,389,939	(\$547,959)	\$31,062,220	\$13,445,749	\$22,053,685
TOTALS	\$24,501,521	\$379,813,022	(\$76,551,533)	(\$106,220,663)	(\$106,220,663)	\$7,267,398	\$225,687,974	\$295,393,348	\$152,241,347

Retail Categories	Far Western Alexandria	Bailey's Crossroads	Franconia	Huntington	Route 1/ Hybla Valley	Oxon Hill	SE Washington DC	Southern Downtown DC	TOTAL OF MARKET AREAS
Major Comparison Retailers	\$11,553,541	(\$86,179,575)	\$99,678,934	\$31,927,473	(\$114,643,994)	(\$41,005,949)	\$158,111,800	\$73,315,966	\$215,813,318
Department Stores Excluding Leased Departments-4521	\$13,066,528	\$11,838,705	\$36,608,735	(\$9,126,414)	(\$9,915,315)	(\$3,085,358)	\$71,947,451	\$47,606,177	\$253,078,904
Radio, Television, Electronics Stores-443112	(\$6,935,296)	(\$30,293,641)	\$10,394,165	\$6,185,093	\$980,318	(\$3,589,801)	\$14,869,738	\$13,080,003	\$26,695,216
Home Furnishing Stores-4422	(\$3,062,831)	(\$8,414,884)	\$4,574,879	\$5,818,600	\$1,126,900	\$3,677,313	\$4,082,700	\$4,249,907	(\$139,110,810)
Home Centers-44411	\$21,624,777	\$18,308,729	\$29,918,286	\$17,871,860	(\$128,608,212)	(\$50,519,098)	\$32,157,527	(\$10,294,036)	\$86,239,943
Book Stores-451211	\$1,104,131	(\$12,604,657)	\$2,793,013	\$1,286,354	\$1,288,316	\$49,500	\$3,127,941	(\$6,620,284)	(\$5,940,611)
In-Line Comparison Retailers	\$34,005,303	(\$68,923,158)	\$20,875,462	(\$872,750)	\$25,462,678	(\$10,831,822)	\$60,517,119	\$39,166,295	\$232,798,883
Clothing Stores-4481	\$20,925,674	(\$52,207,095)	\$5,094,038	(\$675,093)	\$19,384,088	(\$5,421,925)	\$38,424,467	\$16,217,463	\$85,027,264
Food & Beverage	\$49,856,767	(\$24,928,061)	\$24,865,698	\$3,672,725	(\$2,076,958)	\$18,646,447	\$79,055,923	(\$129,586,317)	\$45,820,252
Full-Service Restaurants-7221	\$28,997,885	(\$28,186,996)	\$3,206,770	\$13,403,999	(\$14,153,810)	\$16,402,745	\$40,739,643	(\$19,488,535)	(\$30,928,895)
Limited Service Eating Places-7222	\$16,787,075	\$231,828	\$17,941,556	(\$13,216,673)	\$7,602,296	(\$114,173)	\$33,611,160	(\$101,793,129)	\$20,230,806
Drinking Places Alcoholic Beverages-7224	\$4,071,807	\$3,027,107	\$3,717,372	\$3,485,399	\$4,474,557	\$2,357,874	\$4,705,120	(\$8,304,654)	\$56,518,341
Neighborhood Retailers	\$28,006,373	(\$109,908,080)	\$51,793,269	\$46,751,756	(\$51,315,951)	\$75,438	\$129,659,227	\$27,624,432	\$271,514,765
Supermarket, Grocery -44511	\$23,342,844	(\$120,556,396)	\$7,347,847	\$39,376,618	(\$73,540,093)	(\$13,595,363)	\$74,550,863	\$33,992,854	(\$4,460,846)
Pharmacies and Drug Stores-44611	\$18,421,937	\$9,190,901	\$21,041,515	\$3,681,503	\$9,072,758	\$12,537,337	\$26,236,459	(\$22,626,022)	\$172,589,105
TOTALS	\$123,421,984	(\$289,938,874)	\$197,213,363	\$81,479,204	(\$142,574,224)	(\$33,115,887)	\$427,344,069	\$10,520,375	\$765,947,218

SOURCE: RCLCO; Iexpress/Claritas, Inc.; MWCOG, Round 7.1 Cooperative Forecasts

Exhibit 24

EMPLOYMENT DATA FOR SELECT ZIP CODE MARKET AREAS
POTOMAC YARD STUDY AREA
OCTOBER 2008

Place/ Zip Code	Office Employment 2/			Total 1/				
	Occupied Office	Office Employees, 2008	Office Employees, 2020	2005 Employees	2008 Employees	2010 Employees	2020 Employees	2008 - % Office Employment
Alexandria	18,183,715	72,735	84,667	105,741	106,976	107,800	124,526	68%
Arlington	33,892,666	135,571	158,234	194,875	207,216	215,443	241,856	65%
Mount Vernon/Braddock	413,955	1,656	1,538	5,960	5,832	5,746	5,418	28%
Crystal City/Pentagon City	11,110,898	44,444	48,426	61,350	64,292	66,254	70,053	69%
Old Town/Carlyle	14,165,113	56,660	64,377	59,562	60,809	61,641	69,091	93%
Western Alexandria	731,078	2,924	3,622	20,194	20,310	20,388	25,153	14%
Shirlington/Fairlington	1,617,693	6,471	6,733	14,485	15,042	15,413	15,651	43%
Columbia Pike	1,008,970	4,036	5,788	13,374	13,489	13,566	19,347	30%
Rosslyn-Ballston	20,802,002	83,208	99,416	97,827	106,501	112,284	127,247	78%
Far Western Alexandria	2,690,806	10,763	13,840	18,465	18,701	18,858	24,046	58%
Bailey's Crossroads	3,285,843	13,143	13,900	20,859	21,718	22,291	22,968	61%
Franconia	948,489	3,794	4,713	6,835	7,428	7,823	9,227	51%
Huntington	329,024	1,316	1,674	3,116	3,438	3,653	4,374	38%
Route 1/ Hybla Valley	404,192	1,617	1,888	8,743	9,169	9,453	10,709	18%
Oxon Hill	624,522	2,498	3,413	7,136	8,027	8,621	10,966	31%
SE Washington, DC	472,694	1,891	2,203	26,755	27,613	28,185	32,175	7%
Southern Downtown DC	24,428,867	97,715	109,122	197,666	204,647	209,301	228,536	48%

1/ RCLCO used best fit TAZ districts to match zip code market areas; in areas where an especially substantial part of a TAZ district extended outside of a market area, and assumed adjustment to households was made based upon the likely share of the TAZ district area that was outside the zip code area.

2/ Assuming 250 SF per employee for 2008 office occupied space; 2020 office employment assumes similar % of office to non-office employment.

SOURCE: RCLCO; Costar.; MWCOG, Round 7.1 Cooperative Forecasts

Exhibit 25

DISTRIBUTION OF RETAIL EXPENDITURES PER EMPLOYEE
CITY OF ALEXANDRIA, ARLINGTON COUNTY, AND MARKET AREAS
OCTOBER 2008

Retail Categories	RESTAURANTS AND BARS	OTHER CONVENIENCE GOODS	APPAREL & ACCESSORIES	OTHER COMPARISON GOODS	TOTALS
Expenditures per Office Employee 1/	\$1,886	\$1,426	\$1,058	\$1,058	\$5,428
% of Employment Spending From Outside of Market Areas 2/					60.0%
Net Expenditures per Office Employee	\$1,132	\$856	\$635	\$635	\$3,257
% of Expenditures Spent by Non-Office Workers 3/					50.0%
Net Expenditures per Non-Office Employee	\$566	\$428	\$317	\$317	\$1,628

					Total Office	Total Non Office
Major Comparison Retailers	0.0%	0.0%	40.0%	70.0%	\$698	\$349
Department Stores Excluding Leased Departments-4521	0.0%	0.0%	40.0%	20.0%	\$381	\$190
Radio, Television, Electronics Stores-443112	0.0%	0.0%	0.0%	10.0%	\$63	\$32
Home Furnishing Stores-4422	0.0%	0.0%	0.0%	5.0%	\$32	\$16
Home Centers-44411	0.0%	0.0%	0.0%	5.0%	\$32	\$16
Book Stores-451211	0.0%	0.0%	0.0%	10.0%	\$63	\$32
In-Line Comparison Retailers	0.0%	0.0%	60.0%	30.0%	\$571	\$286
Clothing Stores-4481	0.0%		40.0%	0.0%	\$254	\$127
Food & Beverage	100.0%	0.0%	0.0%	0.0%	\$1,132	\$566
Full-Service Restaurants-7221	45.0%	0.0%	0.0%	0.0%	\$509	\$255
Limited Service Eating Places-7222	45.0%	0.0%	0.0%	0.0%	\$509	\$255
Drinking Places Alcoholic Beverages-7224	10.0%	0.0%	0.0%	0.0%	\$113	\$57
Neighborhood Retailers	0.0%	100.0%	0.0%	0.0%	\$856	\$428
Supermarket, Grocery -44511	0.0%	40.0%	0.0%	0.0%	\$342	\$171
Pharmacies and Drug Stores-44611	0.0%	15.0%	0.0%	0.0%	\$128	\$64
TOTALS	100.0%	100.0%	100.0%	100.0%	\$3,257	\$1,628

1/ Office worker weekly expenditures from ICSC 2003 "Office Worker Retail Spending Patterns"

2/ To avoid double counting of household expenditures in identified market areas; Based upon US Census data, which shows roughly 60% of persons work 25 minutes or more away

3/ RCLCO judgment, based upon expectation that non-office workers will generally have lower incomes.

SOURCE: RCLCO; Iexpress/Claritas, Inc.; MWCOG, Round 7.1 Cooperative Forecasts

Exhibit 26A

RETAIL DEMAND FROM EMPLOYEES, 2008
CITY OF ALEXANDRIA, ARLINGTON COUNTY, AND MARKET AREAS
OCTOBER 2008

Retail Categories	City of Alexandria	Arlington County	Mt. Vernon/Braddock	Crystal City/Pentagon City	Old Town/ Carlyle	Western Alexandria	Shirlington/Fairlington	Columbia Pike	Rosslyn/Ballston
Major Comparison Retailers	\$62,744,389	\$119,680,466	\$2,614,158	\$37,964,084	\$41,013,424	\$8,112,167	\$7,510,899	\$6,118,706	\$66,235,073
Department Stores Excluding Leased Departments-4521	\$34,224,212	\$65,280,254	\$1,425,904	\$20,707,682	\$22,370,959	\$4,424,819	\$4,096,854	\$3,337,476	\$36,128,222
Radio, Television, Electronics Stores-443112	\$5,704,035	\$10,880,042	\$237,651	\$3,451,280	\$3,728,493	\$737,470	\$682,809	\$556,246	\$6,021,370
Home Furnishing Stores-4422	\$2,852,018	\$5,440,021	\$118,825	\$1,725,640	\$1,864,247	\$368,735	\$341,405	\$278,123	\$3,010,685
Home Centers-44411	\$2,852,018	\$5,440,021	\$118,825	\$1,725,640	\$1,864,247	\$368,735	\$341,405	\$278,123	\$3,010,685
Book Stores-451211	\$5,704,035	\$10,880,042	\$237,651	\$3,451,280	\$3,728,493	\$737,470	\$682,809	\$556,246	\$6,021,370
In-Line Comparison Retailers	\$51,336,319	\$97,920,381	\$2,138,856	\$31,061,523	\$33,556,438	\$6,637,228	\$6,145,281	\$5,006,214	\$54,192,332
Clothing Stores-4481	\$22,816,142	\$43,520,169	\$950,603	\$13,805,122	\$14,913,972	\$2,949,879	\$2,731,236	\$2,224,984	\$24,085,481
Food & Beverage	\$101,680,631	\$193,948,581	\$4,236,382	\$61,522,824	\$66,464,442	\$13,146,200	\$12,171,813	\$9,915,690	\$107,337,470
Full-Service Restaurants-7221	\$45,756,284	\$87,276,862	\$1,906,372	\$27,685,271	\$29,908,999	\$5,915,790	\$5,477,316	\$4,462,061	\$48,301,861
Limited Service Eating Places-7222	\$45,756,284	\$87,276,862	\$1,906,372	\$27,685,271	\$29,908,999	\$5,915,790	\$5,477,316	\$4,462,061	\$48,301,861
Drinking Places Alcoholic Beverages-7224	\$10,168,063	\$19,394,858	\$423,638	\$6,152,282	\$6,646,444	\$1,314,620	\$1,217,181	\$991,569	\$10,733,747
Neighborhood Retailers	\$76,880,477	\$146,644,049	\$3,203,118	\$46,517,257	\$50,253,603	\$9,939,810	\$9,203,078	\$7,497,229	\$81,157,599
Supermarket, Grocery -44511	\$30,752,191	\$58,657,620	\$1,281,247	\$18,606,903	\$20,101,441	\$3,975,924	\$3,681,231	\$2,998,892	\$32,463,040
Pharmacies and Drug Stores-44611	\$11,532,072	\$21,996,607	\$480,468	\$6,977,589	\$7,538,040	\$1,490,971	\$1,380,462	\$1,124,584	\$12,173,640
TOTALS	\$292,641,816	\$558,193,478	\$12,192,515	\$177,065,689	\$191,287,907	\$37,835,405	\$35,031,072	\$28,537,840	\$308,922,474

Retail Categories	Far Western Alexandria	Bailey's Crossroads	Franconia	Huntington	Route 1/ Hybla Valley	Oxon Hill	SE Washington DC	Southern Downtown DC	TOTAL OF MARKET AREAS
Major Comparison Retailers	\$10,287,069	\$12,171,499	\$3,917,964	\$1,659,915	\$3,765,743	\$3,674,715	\$10,300,948	\$105,566,832	\$320,913,199
Department Stores Excluding Leased Departments-4521	\$5,611,129	\$6,639,000	\$2,137,071	\$905,408	\$2,054,042	\$2,004,390	\$5,618,699	\$57,581,908	\$175,043,563
Radio, Television, Electronics Stores-443112	\$935,188	\$1,106,500	\$356,179	\$150,901	\$342,340	\$334,065	\$936,450	\$9,596,985	\$29,173,927
Home Furnishing Stores-4422	\$467,594	\$553,250	\$178,089	\$75,451	\$171,170	\$167,033	\$468,225	\$4,798,492	\$14,586,964
Home Centers-44411	\$467,594	\$553,250	\$178,089	\$75,451	\$171,170	\$167,033	\$468,225	\$4,798,492	\$14,586,964
Book Stores-451211	\$935,188	\$1,106,500	\$356,179	\$150,901	\$342,340	\$334,065	\$936,450	\$9,596,985	\$29,173,927
In-Line Comparison Retailers	\$8,416,693	\$9,958,500	\$3,205,607	\$1,358,112	\$3,081,062	\$3,006,585	\$8,428,049	\$86,372,863	\$262,565,344
Clothing Stores-4481	\$3,740,752	\$4,426,000	\$1,424,714	\$603,605	\$1,369,361	\$1,336,260	\$3,745,799	\$38,387,939	\$116,695,709
Food & Beverage	\$16,670,745	\$19,724,564	\$6,349,270	\$2,689,981	\$6,102,588	\$5,955,072	\$16,693,236	\$171,076,684	\$520,056,962
Full-Service Restaurants-7221	\$7,501,835	\$8,876,054	\$2,857,171	\$1,210,491	\$2,746,164	\$2,679,782	\$7,511,956	\$76,984,508	\$234,025,633
Limited Service Eating Places-7222	\$7,501,835	\$8,876,054	\$2,857,171	\$1,210,491	\$2,746,164	\$2,679,782	\$7,511,956	\$76,984,508	\$234,025,633
Drinking Places Alcoholic Beverages-7224	\$1,667,074	\$1,972,456	\$634,927	\$268,998	\$610,259	\$595,507	\$1,669,324	\$17,107,668	\$52,005,696
Neighborhood Retailers	\$12,604,709	\$14,913,695	\$4,800,667	\$2,033,888	\$4,614,152	\$4,502,616	\$12,621,715	\$129,350,664	\$393,213,801
Supermarket, Grocery -44511	\$5,041,884	\$5,965,478	\$1,920,267	\$813,555	\$1,845,661	\$1,801,046	\$5,048,686	\$51,740,266	\$157,285,520
Pharmacies and Drug Stores-44611	\$1,890,706	\$2,237,054	\$720,100	\$305,083	\$692,123	\$675,392	\$1,893,257	\$19,402,600	\$58,982,070
TOTALS	\$47,979,217	\$56,768,258	\$18,273,507	\$7,741,896	\$17,563,545	\$17,138,988	\$48,043,949	\$492,367,043	\$1,496,749,305

SOURCE: RCLCO; utilizing data in previous exhibits.

Exhibit 26B

**RETAIL DEMAND FROM EMPLOYEES, 2020
CITY OF ALEXANDRIA, ARLINGTON COUNTY, AND MARKET AREAS
OCTOBER 2008**

Retail Categories	City of Alexandria	Arlington County	Mt. Vernon/Braddock	Crystal City/ Pentagon City	Old Town/ Carlyle	Western Alexandria	Shirlington/ Fairlington	Columbia Pike	Rosslyn/Ballston
Major Comparison Retailers	\$73,037,678	\$139,687,412	\$2,428,751	\$41,365,667	\$46,599,021	\$10,046,348	\$7,815,094	\$8,775,807	\$79,137,271
Department Stores Excluding Leased Departments-4521	\$39,838,733	\$76,193,134	\$1,324,774	\$22,563,091	\$25,417,648	\$5,479,826	\$4,262,779	\$4,786,804	\$43,165,784
Radio, Television, Electronics Stores-443112	\$6,639,789	\$12,698,856	\$220,796	\$3,760,515	\$4,236,275	\$913,304	\$710,463	\$797,801	\$7,194,297
Home Furnishing Stores-4422	\$3,319,894	\$6,349,428	\$110,398	\$1,880,258	\$2,118,137	\$456,652	\$355,232	\$398,900	\$3,597,149
Home Centers-44411	\$3,319,894	\$6,349,428	\$110,398	\$1,880,258	\$2,118,137	\$456,652	\$355,232	\$398,900	\$3,597,149
Book Stores-451211	\$6,639,789	\$12,698,856	\$220,796	\$3,760,515	\$4,236,275	\$913,304	\$710,463	\$797,801	\$7,194,297
In-Line Comparison Retailers	\$59,758,100	\$114,289,701	\$1,987,160	\$33,844,638	\$38,126,471	\$8,219,739	\$6,394,168	\$7,180,206	\$64,748,676
Clothing Stores-4481	\$26,559,156	\$50,795,422	\$883,182	\$15,042,061	\$16,945,098	\$3,653,217	\$2,841,852	\$3,191,202	\$28,777,189
Food & Beverage	\$118,361,454	\$226,370,905	\$3,935,921	\$67,035,270	\$75,516,199	\$16,280,643	\$12,664,777	\$14,221,663	\$128,246,170
Full-Service Restaurants-7221	\$53,262,654	\$101,866,907	\$1,771,165	\$30,165,872	\$33,982,290	\$7,326,289	\$5,699,150	\$6,399,748	\$57,710,777
Limited Service Eating Places-7222	\$53,262,654	\$101,866,907	\$1,771,165	\$30,165,872	\$33,982,290	\$7,326,289	\$5,699,150	\$6,399,748	\$57,710,777
Drinking Places Alcoholic Beverages-7224	\$11,836,145	\$22,637,090	\$393,592	\$6,703,527	\$7,551,620	\$1,628,064	\$1,266,478	\$1,422,166	\$12,824,617
Neighborhood Retailers	\$89,492,807	\$171,158,489	\$2,975,941	\$50,665,204	\$57,097,614	\$12,309,754	\$9,575,807	\$10,752,965	\$96,966,617
Supermarket, Grocery -44511	\$35,797,123	\$68,463,396	\$1,190,376	\$20,274,082	\$22,839,046	\$4,923,902	\$3,830,323	\$4,301,186	\$38,786,647
Pharmacies and Drug Stores-44611	\$13,423,921	\$25,673,773	\$446,391	\$7,602,781	\$8,564,642	\$1,846,463	\$1,436,371	\$1,612,945	\$14,544,992
TOTALS	\$340,650,038	\$651,506,506	\$11,327,774	\$192,930,776	\$217,339,306	\$46,856,484	\$36,449,847	\$40,930,640	\$369,098,734

Retail Categories	Far Western Alexandria	Bailey's Crossroads	Franconia	Huntington	Route 1/ Hybla Valley	Oxon Hill	SE Washington DC	Southern Downtown DC	TOTAL OF MARKET AREAS
Major Comparison Retailers	\$13,227,395	\$12,871,761	\$4,866,993	\$2,111,706	\$4,398,227	\$5,020,106	\$12,002,789	\$117,889,935	\$368,556,872
Department Stores Excluding Leased Departments-4521	\$7,214,943	\$7,020,961	\$2,654,724	\$1,151,840	\$2,399,033	\$2,738,240	\$6,546,976	\$64,303,601	\$201,031,021
Radio, Television, Electronics Stores-443112	\$1,202,490	\$1,170,160	\$442,454	\$191,973	\$399,839	\$456,373	\$1,091,163	\$10,717,267	\$33,505,170
Home Furnishing Stores-4422	\$601,245	\$585,080	\$221,227	\$95,987	\$199,919	\$228,187	\$545,581	\$5,358,633	\$16,752,585
Home Centers-44411	\$601,245	\$585,080	\$221,227	\$95,987	\$199,919	\$228,187	\$545,581	\$5,358,633	\$16,752,585
Book Stores-451211	\$1,202,490	\$1,170,160	\$442,454	\$191,973	\$399,839	\$456,373	\$1,091,163	\$10,717,267	\$33,505,170
In-Line Comparison Retailers	\$10,822,414	\$10,531,441	\$3,982,085	\$1,727,760	\$3,598,549	\$4,107,360	\$9,820,464	\$96,455,401	\$301,546,532
Clothing Stores-4481	\$4,809,962	\$4,680,640	\$1,769,816	\$767,893	\$1,599,355	\$1,825,493	\$4,364,651	\$42,869,067	\$134,020,681
Food & Beverage	\$21,435,699	\$20,859,376	\$7,887,222	\$3,422,132	\$7,127,561	\$8,135,350	\$19,451,160	\$191,046,930	\$597,266,077
Full-Service Restaurants-7221	\$9,646,065	\$9,386,719	\$3,549,250	\$1,539,960	\$3,207,403	\$3,660,908	\$8,753,022	\$85,971,119	\$268,769,735
Limited Service Eating Places-7222	\$9,646,065	\$9,386,719	\$3,549,250	\$1,539,960	\$3,207,403	\$3,660,908	\$8,753,022	\$85,971,119	\$268,769,735
Drinking Places Alcoholic Beverages-7224	\$2,143,570	\$2,085,938	\$788,722	\$342,213	\$712,756	\$813,535	\$1,945,116	\$19,104,693	\$59,726,608
Neighborhood Retailers	\$16,207,480	\$15,771,723	\$5,963,510	\$2,587,466	\$5,389,132	\$6,151,118	\$14,706,975	\$144,450,118	\$451,591,424
Supermarket, Grocery -44511	\$6,482,992	\$6,308,689	\$2,385,404	\$1,034,986	\$2,155,653	\$2,460,447	\$5,882,790	\$57,780,047	\$180,636,570
Pharmacies and Drug Stores-44611	\$2,431,122	\$2,365,759	\$894,526	\$388,120	\$808,370	\$922,668	\$2,206,046	\$21,667,518	\$67,738,714
TOTALS	\$61,692,989	\$60,034,302	\$22,699,811	\$9,849,064	\$20,513,469	\$23,413,935	\$55,981,388	\$549,842,385	\$1,718,960,905

SOURCE: RCLCO; utilizing data in previous exhibits.

Exhibit 27A

**TOTAL RETAIL DEMAND, 2008 1/
CITY OF ALEXANDRIA, ARLINGTON COUNTY, AND MARKET AREAS
OCTOBER 2008**

Retail Categories	City of Alexandria	Arlington County	Mt. Vernon/Braddock	Crystal City/ Pentagon City	Old Town/ Carlyle	Western Alexandria	Shirlington/ Fairlington	Columbia Pike	Rosslyn/Ballston
Major Comparison Retailers	\$654,796,377	\$1,038,850,372	\$109,458,930	\$164,052,515	\$210,603,666	\$174,755,700	\$191,908,362	\$142,073,953	\$368,395,924
Department Stores Excluding Leased Departments-4521	\$257,422,098	\$411,065,207	\$41,351,447	\$70,021,846	\$84,375,237	\$67,870,416	\$71,720,570	\$66,913,254	\$151,862,248
Radio, Television, Electronics Stores-443112	\$61,054,127	\$96,187,695	\$10,008,642	\$15,901,881	\$19,061,134	\$16,527,037	\$17,452,149	\$13,521,281	\$35,511,998
Home Furnishing Stores-4422	\$45,439,830	\$72,102,209	\$7,958,501	\$10,481,063	\$14,887,789	\$11,934,575	\$13,861,833	\$9,299,307	\$24,199,198
Home Centers-44411	\$116,032,688	\$179,715,046	\$21,631,244	\$21,402,065	\$35,370,600	\$32,271,430	\$38,288,309	\$25,525,426	\$54,099,802
Book Stores-451211	\$22,008,017	\$37,532,945	\$2,908,195	\$7,551,149	\$8,609,041	\$5,225,075	\$5,759,723	\$4,004,604	\$15,617,327
In-Line Comparison Retailers	\$296,219,971	\$481,128,721	\$46,103,758	\$86,334,144	\$102,962,819	\$75,037,910	\$80,028,771	\$62,909,697	\$184,386,708
Clothing Stores-4481	\$163,134,233	\$263,305,584	\$26,498,426	\$44,846,551	\$53,878,088	\$42,416,383	\$45,167,473	\$36,363,519	\$97,788,325
Food & Beverage	\$519,541,901	\$840,786,963	\$73,466,042	\$164,058,468	\$185,887,870	\$132,726,420	\$135,277,716	\$107,166,909	\$344,006,709
Full-Service Restaurants-7221	\$255,683,816	\$411,909,946	\$36,796,682	\$78,847,907	\$89,647,947	\$66,087,547	\$67,559,049	\$53,303,339	\$166,779,518
Limited Service Eating Places-7222	\$228,203,994	\$369,564,466	\$32,191,355	\$72,394,617	\$81,600,081	\$58,374,597	\$47,475,737	\$47,475,737	\$151,390,107
Drinking Places Alcoholic Beverages-7224	\$35,654,091	\$59,312,550	\$4,478,005	\$12,815,943	\$14,639,842	\$8,264,276	\$8,686,276	\$6,387,833	\$25,837,083
Neighborhood Retailers	\$703,692,067	\$1,095,804,533	\$113,674,062	\$182,493,399	\$211,073,676	\$197,655,890	\$197,308,280	\$170,075,382	\$394,814,875
Supermarket, Grocery -44511	\$345,087,784	\$533,965,981	\$57,637,835	\$85,483,369	\$97,464,096	\$99,190,895	\$97,145,575	\$88,389,972	\$188,349,713
Pharmacies and Drug Stores-44611	\$159,673,872	\$243,921,514	\$25,681,996	\$40,270,508	\$45,895,953	\$46,268,915	\$45,442,853	\$38,918,488	\$85,601,813
TOTALS	\$2,174,250,315	\$3,456,570,589	\$342,702,792	\$596,938,526	\$710,528,030	\$580,175,921	\$604,523,129	\$482,225,940	\$1,291,604,215

Retail Categories	Far Western Alexandria	Bailey's Crossroads	Franconia	Huntington	Route 1/ Hybla Valley	Oxon Hill	SE Washington DC	Southern DOWNTOWN DC	TOTAL OF MARKET AREAS
Major Comparison Retailers	\$136,726,381	\$104,830,403	\$131,868,482	\$103,793,336	\$134,424,626	\$84,414,110	\$179,763,296	\$278,375,187	\$2,515,444,872
Department Stores Excluding Leased Departments-4521	\$55,323,856	\$42,557,106	\$47,007,173	\$39,854,316	\$50,088,183	\$33,410,856	\$77,631,678	\$123,401,528	\$1,013,389,716
Radio, Television, Electronics Stores-443112	\$12,952,665	\$9,612,303	\$11,047,262	\$9,973,966	\$11,717,281	\$7,597,081	\$16,920,109	\$25,645,666	\$233,450,455
Home Furnishing Stores-4422	\$9,006,963	\$6,941,001	\$10,173,566	\$7,341,440	\$9,776,082	\$5,568,651	\$10,506,517	\$16,914,305	\$168,850,792
Home Centers-44411	\$23,567,380	\$18,838,382	\$30,866,304	\$18,083,540	\$29,436,486	\$17,949,335	\$32,344,946	\$38,542,739	\$438,217,988
Book Stores-451211	\$4,277,273	\$3,456,464	\$3,367,090	\$3,060,825	\$3,401,524	\$1,786,878	\$4,126,168	\$14,751,261	\$87,902,595
In-Line Comparison Retailers	\$62,273,406	\$48,329,985	\$51,391,672	\$44,019,020	\$53,676,558	\$35,979,157	\$83,083,504	\$158,489,557	\$1,175,006,666
Clothing Stores-4481	\$35,254,741	\$26,795,192	\$29,307,521	\$24,971,816	\$30,827,723	\$21,004,483	\$49,130,137	\$78,443,029	\$642,693,408
Food & Beverage	\$106,787,780	\$84,604,544	\$80,516,339	\$75,974,475	\$87,712,928	\$56,189,330	\$133,770,492	\$315,203,557	\$2,083,349,578
Full-Service Restaurants-7221	\$52,683,048	\$41,305,762	\$40,185,860	\$38,212,845	\$43,763,760	\$27,772,755	\$65,807,145	\$147,876,948	\$1,016,630,112
Limited Service Eating Places-7222	\$47,368,893	\$37,643,770	\$35,411,304	\$33,108,551	\$38,797,048	\$25,344,123	\$60,879,596	\$140,349,826	\$921,361,996
Drinking Places Alcoholic Beverages-7224	\$6,735,839	\$5,655,011	\$4,919,175	\$4,653,078	\$5,152,121	\$3,072,452	\$7,083,752	\$26,976,783	\$145,357,470
Neighborhood Retailers	\$160,166,709	\$123,380,762	\$128,412,754	\$113,428,025	\$147,837,575	\$101,768,968	\$254,567,307	\$317,719,194	\$2,814,376,855
Supermarket, Grocery -44511	\$81,764,216	\$62,279,664	\$63,375,580	\$56,568,195	\$74,904,250	\$52,889,787	\$137,208,454	\$144,339,095	\$1,386,990,695
Pharmacies and Drug Stores-44611	\$36,541,977	\$27,975,778	\$29,140,448	\$27,167,210	\$34,530,239	\$24,123,670	\$60,970,799	\$66,316,086	\$634,846,734
TOTALS	\$465,954,275	\$361,145,694	\$392,189,247	\$337,214,856	\$423,651,687	\$278,351,565	\$651,184,599	\$1,069,787,495	\$8,588,177,971

1/ Assumes a range of % additional demand on top of household and office demand: Major Comparison Retailers, 10%; In-Line Comparison Retailers, 10%; Food and Beverage, 20%; Neighborhood Retailers, 5%.
SOURCE: RCLCO; utilizing data in previous exhibits.

Exhibit 27B

**TOTAL RETAIL DEMAND, 2020 1/
CITY OF ALEXANDRIA, ARLINGTON COUNTY, AND MARKET AREAS
OCTOBER 2008**

Retail Categories	City of Alexandria	Arlington County	Mt. Vernon/Braddock	Crystal City/ Pentagon City	Old Town/ Carlyle	Western Alexandria	Shirlington/ Fairlington	Columbia Pike	Rosslyn/Ballston
Major Comparison Retailers	\$747,770,995	\$1,203,746,634	\$117,064,653	\$263,199,360	\$268,956,050	\$201,279,532	\$200,336,744	\$166,927,068	\$443,934,456
Department Stores Excluding Leased Departments-4521	\$294,232,749	\$476,503,959	\$44,155,215	\$103,441,857	\$106,581,870	\$78,299,557	\$74,865,382	\$67,134,564	\$182,877,107
Radio, Television, Electronics Stores-443112	\$69,719,241	\$111,453,386	\$10,704,308	\$23,815,854	\$24,339,189	\$19,032,470	\$18,218,627	\$15,878,761	\$42,798,742
Home Furnishing Stores-4422	\$51,851,089	\$83,516,486	\$8,522,796	\$18,955,239	\$19,216,907	\$13,727,354	\$14,471,418	\$10,889,400	\$29,180,016
Home Centers-44411	\$132,283,942	\$208,078,858	\$23,197,380	\$45,899,941	\$46,161,609	\$37,056,043	\$39,974,431	\$29,744,711	\$65,287,233
Book Stores-451211	\$25,230,462	\$43,560,233	\$3,083,591	\$10,066,348	\$10,589,683	\$6,067,833	\$6,010,885	\$4,820,054	\$18,774,438
In-Line Comparison Retailers	\$338,902,877	\$557,949,821	\$49,142,655	\$124,117,440	\$128,827,458	\$86,743,719	\$83,531,698	\$74,602,335	\$221,898,865
Clothing Stores-4481	\$186,492,563	\$305,240,151	\$28,289,261	\$65,840,830	\$67,934,172	\$48,952,729	\$47,147,387	\$42,921,929	\$117,748,106
Food & Beverage	\$545,389,383	\$894,175,624	\$71,606,391	\$201,716,891	\$211,045,913	\$140,885,124	\$129,421,946	\$117,123,232	\$379,286,980
Full-Service Restaurants-7221	\$268,288,007	\$437,983,293	\$35,899,425	\$98,005,811	\$102,203,871	\$70,086,672	\$64,636,982	\$58,114,777	\$183,936,450
Limited Service Eating Places-7222	\$239,586,939	\$393,052,789	\$31,368,550	\$88,301,248	\$92,499,308	\$61,976,343	\$56,476,403	\$51,907,224	\$166,901,241
Drinking Places Alcoholic Beverages-7224	\$37,514,437	\$63,139,541	\$4,338,415	\$15,409,832	\$16,342,735	\$8,822,110	\$8,308,561	\$7,101,231	\$28,449,289
Neighborhood Retailers	\$842,045,768	\$1,330,357,959	\$127,304,900	\$273,920,399	\$280,974,050	\$238,529,068	\$215,777,723	\$209,289,607	\$498,330,784
Supermarket, Grocery -44511	\$412,747,368	\$648,123,601	\$64,603,666	\$127,531,445	\$130,352,906	\$119,600,872	\$106,242,424	\$108,501,267	\$237,820,759
Pharmacies and Drug Stores-44611	\$190,907,143	\$296,018,949	\$28,800,141	\$60,705,471	\$61,763,519	\$55,752,893	\$49,699,527	\$47,714,935	\$108,121,857
TOTALS	\$2,474,109,023	\$3,986,230,038	\$365,118,599	\$862,954,091	\$889,803,472	\$667,437,462	\$629,068,110	\$567,942,242	\$1,543,451,086

Retail Categories	Far Western Alexandria	Bailey's Crossroads	Franconia	Huntington	Route 1/ Hybla Valley	Oxon Hill	SE Washington DC	Southern DOWNTOWN DC	TOTAL OF MARKET AREAS
Major Comparison Retailers	\$143,955,012	\$115,180,335	\$142,227,400	\$113,685,203	\$163,113,323	\$101,969,665	\$200,385,607	\$349,560,231	\$2,991,774,638
Department Stores Excluding Leased Departments-4521	\$58,653,509	\$46,670,573	\$50,837,627	\$43,705,654	\$60,744,343	\$40,459,777	\$86,606,893	\$152,128,409	\$1,197,162,337
Radio, Television, Electronics Stores-443112	\$13,626,470	\$10,561,824	\$11,920,281	\$10,922,815	\$14,217,237	\$9,177,654	\$18,859,208	\$32,237,383	\$276,310,825
Home Furnishing Stores-4422	\$9,424,465	\$7,639,414	\$10,949,637	\$8,032,796	\$11,867,777	\$6,712,987	\$11,703,883	\$21,663,399	\$202,957,488
Home Centers-44411	\$24,448,625	\$20,783,190	\$33,153,464	\$19,764,632	\$35,752,493	\$21,569,999	\$35,973,419	\$50,973,964	\$529,741,134
Book Stores-451211	\$4,674,771	\$3,761,085	\$3,679,264	\$3,372,723	\$4,114,725	\$2,205,320	\$4,641,014	\$17,473,429	\$103,335,164
In-Line Comparison Retailers	\$66,608,205	\$62,875,776	\$55,741,181	\$48,343,735	\$65,050,739	\$43,724,896	\$92,832,163	\$192,127,389	\$1,386,168,253
Clothing Stores-4481	\$37,422,664	\$29,372,376	\$31,712,873	\$27,392,166	\$37,380,833	\$25,449,860	\$54,821,468	\$96,235,816	\$758,622,471
Food & Beverage	\$105,663,913	\$84,654,178	\$80,378,106	\$76,592,676	\$97,364,454	\$62,897,146	\$137,263,187	\$346,689,718	\$2,242,589,854
Full-Service Restaurants-7221	\$51,926,727	\$41,369,161	\$40,058,843	\$38,495,563	\$48,594,733	\$31,040,063	\$67,483,841	\$163,507,810	\$1,095,360,729
Limited Service Eating Places-7222	\$46,900,270	\$37,660,667	\$35,362,560	\$33,385,526	\$43,063,677	\$28,368,534	\$62,464,086	\$154,157,209	\$990,792,845
Drinking Places Alcoholic Beverages-7224	\$6,836,915	\$5,624,349	\$4,956,704	\$4,711,586	\$5,706,044	\$3,488,550	\$7,315,260	\$29,024,698	\$156,436,280
Neighborhood Retailers	\$176,659,299	\$142,022,389	\$145,245,039	\$130,180,652	\$187,916,957	\$128,762,477	\$297,126,284	\$417,143,498	\$3,469,183,146
Supermarket, Grocery -44511	\$89,794,491	\$71,770,692	\$71,599,253	\$64,883,210	\$95,236,498	\$66,819,954	\$160,043,198	\$191,349,571	\$1,706,150,205
Pharmacies and Drug Stores-44611	\$40,029,555	\$32,262,105	\$32,891,430	\$31,143,586	\$43,911,426	\$30,450,695	\$71,097,027	\$89,060,943	\$783,405,111
TOTALS	\$492,886,428	\$394,732,677	\$423,591,725	\$368,802,265	\$513,445,472	\$337,354,184	\$727,607,241	\$1,305,520,837	\$10,089,715,892

1/ Assumes a range of % additional demand on top of household and office demand: Major Comparison Retailers, 10%; In-Line Comparison Retailers, 10%; Food and Beverage, 20%; Neighborhood Retailers, 5%.

SOURCE: RCLCO; utilizing data in previous exhibits.

Exhibit 28

**RETAIL SALES SUMMARY, 2008
CITY OF ALEXANDRIA, ARLINGTON COUNTY, AND MARKET AREAS
OCTOBER 2008**

Retail Categories	City of Alexandria	Arlington County	Mt. Vernon/Braddock	Crystal City/ Pentagon City	Old Town/ Carlyle	Western Alexandria	Shirlington/ Fairlington	Columbia Pike	Rosslyn/Ballston
Major Comparison Retailers	\$768,282,494	\$591,173,007	\$166,896,040	\$340,315,451	\$251,699,945	\$307,656,747	\$31,046,606	\$28,279,945	\$194,132,112
Department Stores Excluding Leased Departments-4521	\$296,198,000	\$330,659,996	\$111,966,945	\$247,527,212	\$33,882,111	\$124,937,854	\$8,655,051	\$17,909,838	\$65,223,146
Radio, Television, Electronics Stores-443112	\$59,482,995	\$69,122,985	\$10,099,641	\$51,191,734	\$23,521,184	\$25,835,425	\$6,093,560	\$3,638,206	\$8,169,032
Home Furnishing Stores-4422	\$115,130,973	\$66,648,002	\$6,772,404	\$20,224,476	\$72,649,500	\$34,592,632	\$1,205,651	\$396,560	\$58,492,357
Home Centers-44411	\$83,854,001	\$0	\$0	\$0	\$12,650,390	\$71,203,611	\$0	\$0	\$0
Book Stores-451211	\$14,911,998	\$18,498,006	\$6,206,724	\$4,069,559	\$5,628,197	\$1,429,418	\$2,280,869	\$0	\$11,369,735
In-Line Comparison Retailers	\$194,706,985	\$526,302,000	\$47,374,418	\$396,482,672	\$94,940,462	\$47,020,891	\$10,718,980	\$14,643,653	\$95,427,748
Clothing Stores-4481	\$124,903,989	\$395,686,982	\$40,570,604	\$308,833,222	\$61,206,341	\$19,064,835	\$7,298,167	\$11,123,970	\$65,668,850
Food & Beverage	\$340,585,002	\$534,931,992	\$65,427,628	\$185,158,473	\$158,386,836	\$49,458,445	\$107,183,437	\$33,834,574	\$220,458,914
Full-Service Restaurants-7221	\$236,535,992	\$305,253,002	\$46,718,828	\$129,427,270	\$103,958,334	\$29,224,906	\$81,628,979	\$17,908,174	\$102,565,013
Limited Service Eating Places-7222	\$104,049,010	\$216,713,990	\$18,708,800	\$52,694,356	\$54,428,502	\$20,233,539	\$25,554,458	\$15,926,400	\$107,965,748
Drinking Places Alcoholic Beverages-7224	\$0	\$12,965,000	\$0	\$3,036,847	\$0	\$0	\$0	\$0	\$9,928,153
Neighborhood Retailers	\$580,463,981	\$940,118,963	\$117,451,673	\$147,658,870	\$192,766,361	\$148,501,364	\$160,793,256	\$103,228,969	\$371,778,496
Supermarket, Grocery -44511	\$322,963,988	\$523,196,963	\$90,334,020	\$65,497,858	\$79,471,792	\$66,384,819	\$116,423,049	\$48,461,847	\$212,008,357
Pharmacies and Drug Stores-44611	\$116,872,013	\$158,786,007	\$7,496,413	\$27,812,843	\$42,194,072	\$49,385,944	\$12,682,797	\$28,318,519	\$61,693,920
TOTALS	\$1,884,038,462	\$2,592,525,961	\$397,149,759	\$1,069,615,466	\$697,793,604	\$552,637,447	\$309,742,279	\$179,987,141	\$881,797,270

Retail Categories	Far Western Alexandria	Bailey's Crossroads	Franconia	Huntington	Route 1/ Hybla Valley	Oxon Hill	SE Washington DC	Southern Downtown DC	TOTAL OF MARKET AREAS
Major Comparison Retailers	\$106,087,257	\$178,017,209	\$24,751,709	\$69,311,005	\$258,530,606	\$128,685,538	\$12,054,145	\$126,576,127	\$2,224,040,442
Department Stores Excluding Leased Departments-4521	\$33,039,901	\$23,568,127	\$6,952,566	\$47,706,987	\$62,738,412	\$37,128,734	\$239,113	\$26,388,776	\$647,864,573
Radio, Television, Electronics Stores-443112	\$18,120,506	\$38,725,139	\$0	\$3,552,766	\$11,544,605	\$11,476,749	\$1,183,894	\$5,509,442	\$218,661,823
Home Furnishing Stores-4422	\$11,029,281	\$14,774,726	\$5,158,109	\$1,387,955	\$9,462,069	\$2,197,216	\$6,011,613	\$10,085,459	\$254,440,008
Home Centers-44411	\$0	\$0	\$0	\$0	\$160,910,559	\$69,900,001	\$0	\$51,275,370	\$365,939,931
Book Stores-451211	\$1,943,170	\$14,853,665	\$109,319	\$1,587,785	\$2,052,505	\$1,498,963	\$0	\$11,787,952	\$64,817,861
In-Line Comparison Retailers	\$15,725,196	\$106,460,604	\$25,816,253	\$43,093,840	\$30,075,808	\$46,474,368	\$14,055,293	\$39,039,567	\$1,027,349,753
Clothing Stores-4481	\$8,284,968	\$74,228,614	\$21,966,031	\$24,809,169	\$12,999,132	\$26,732,668	\$7,048,581	\$28,400,576	\$718,235,728
Food & Beverage	\$24,765,636	\$81,027,028	\$40,318,085	\$62,534,848	\$83,462,536	\$30,397,427	\$26,277,632	\$253,711,858	\$1,422,403,357
Full-Service Restaurants-7221	\$8,562,166	\$56,408,605	\$29,661,110	\$20,052,008	\$55,123,437	\$8,154,586	\$11,856,281	\$82,160,880	\$783,410,577
Limited Service Eating Places-7222	\$16,203,470	\$24,618,423	\$10,656,975	\$42,027,192	\$28,339,099	\$22,242,841	\$14,421,351	\$155,964,928	\$609,986,082
Drinking Places Alcoholic Beverages-7224	\$0	\$0	\$455,648	\$0	\$0	\$0	\$0	\$15,586,050	\$29,006,698
Neighborhood Retailers	\$116,385,509	\$223,247,619	\$74,284,166	\$69,006,826	\$216,760,416	\$110,830,241	\$125,748,602	\$207,146,812	\$2,385,589,180
Supermarket, Grocery -44511	\$51,805,519	\$179,493,791	\$55,356,979	\$18,573,132	\$157,963,075	\$71,880,328	\$65,060,163	\$82,181,254	\$1,360,895,983
Pharmacies and Drug Stores-44611	\$15,537,446	\$17,772,527	\$7,965,258	\$24,242,728	\$30,038,351	\$14,222,445	\$36,191,156	\$81,922,998	\$457,477,417
TOTALS	\$262,963,598	\$588,752,460	\$165,170,213	\$243,946,519	\$588,829,366	\$316,387,574	\$178,135,672	\$626,474,364	\$7,059,382,732

SOURCE: RCLCO; lexpress/Claritas, Inc.

Exhibit 29A

**TOTAL RETAIL DEMAND-SUPPLY GAP ANALYSIS, 2008 1/
CITY OF ALEXANDRIA, ARLINGTON COUNTY, AND MARKET AREAS
OCTOBER 2008**

Retail Categories	City of Alexandria	Arlington County	Mt. Vernon/Braddock	Crystal City/ Pentagon City	Old Town/ Carlyle	Western Alexandria	Shirlington/ Fairlington	Columbia Pike	Rosslyn/Ballston
Major Comparison Retailers	(\$113,486,117)	\$447,677,365	(\$57,437,110)	(\$176,262,936)	(\$41,096,279)	(\$132,901,047)	\$160,861,756	\$113,794,008	\$174,263,812
Department Stores Excluding Leased Departments-4521	(\$38,775,902)	\$80,405,211	(\$70,615,498)	(\$177,505,366)	\$50,493,126	(\$57,067,438)	\$63,065,519	\$39,003,616	\$86,639,102
Radio, Television, Electronics Stores-443112	\$1,571,132	\$27,064,710	(\$90,999)	(\$35,289,853)	(\$4,460,050)	(\$9,308,388)	\$11,358,589	\$9,883,075	\$27,342,966
Home Furnishing Stores-4422	(\$69,691,143)	(\$14,545,793)	\$1,186,097	(\$9,743,413)	(\$57,761,711)	(\$22,658,057)	\$12,656,182	\$8,902,747	(\$34,293,159)
Home Centers-44411	\$32,178,687	\$179,715,046	\$21,631,244	\$21,402,065	\$22,720,210	(\$38,932,181)	\$38,288,309	\$25,525,426	\$54,099,802
Book Stores-451211	\$7,096,019	\$19,034,939	(\$3,298,529)	\$3,481,590	\$2,980,844	\$3,795,657	\$3,478,854	\$4,004,604	\$4,247,592
In-Line Comparison Retailers	\$101,512,986	(\$45,173,279)	(\$1,270,660)	(\$310,148,528)	\$8,022,357	\$28,017,019	\$69,309,791	\$48,266,044	\$88,958,960
Clothing Stores-4481	\$38,230,244	(\$132,381,398)	(\$14,072,178)	(\$263,986,671)	(\$7,328,253)	\$23,351,548	\$37,869,306	\$25,239,549	\$32,119,475
Food & Beverage	\$178,956,899	\$305,854,971	\$8,038,414	(\$21,100,005)	\$27,501,034	\$83,267,975	\$28,094,279	\$73,332,335	\$123,547,795
Full-Service Restaurants-7221	\$19,147,824	\$106,656,944	(\$9,922,146)	(\$50,579,363)	(\$14,310,387)	\$36,862,641	(\$14,069,930)	\$35,395,165	\$64,214,505
Limited Service Eating Places-7222	\$124,154,984	\$152,850,476	\$13,482,555	\$19,700,261	\$27,171,579	\$38,141,058	\$33,477,933	\$31,549,337	\$43,424,359
Drinking Places Alcoholic Beverages-7224	\$35,654,091	\$46,347,550	\$4,478,005	\$9,779,096	\$14,639,842	\$8,264,276	\$8,686,276	\$6,387,833	\$15,908,930
Neighborhood Retailers	\$123,228,086	\$155,685,571	(\$3,777,611)	\$34,834,529	\$18,307,315	\$49,154,526	\$36,515,024	\$66,846,413	\$23,036,379
Supermarket, Grocery -44511	\$22,123,796	\$10,769,018	(\$32,696,185)	\$19,985,511	\$17,992,304	\$32,806,076	(\$19,277,474)	\$39,928,125	(\$23,658,644)
Pharmacies and Drug Stores-44611	\$42,801,859	\$85,135,507	\$18,185,583	\$12,457,665	\$3,701,881	(\$3,117,029)	\$32,760,056	\$10,599,969	\$23,907,893
TOTALS	\$290,211,853	\$864,044,628	(\$54,446,967)	(\$472,676,940)	\$12,734,426	\$27,538,474	\$294,780,850	\$302,238,799	\$409,806,945

Retail Categories	Far Western Alexandria	Bailey's Crossroads	Franconia	Huntington	Route 1/ Hybla Valley	Oxon Hill	SE Washington DC	Southern Downtown DC	TOTAL OF MARKET AREAS
Major Comparison Retailers	\$30,639,124	(\$73,186,806)	\$107,116,773	\$34,482,331	(\$124,105,980)	(\$44,271,428)	\$167,709,151	\$151,799,060	\$291,404,430
Department Stores Excluding Leased Departments-4521	\$22,283,955	\$18,988,979	\$40,054,607	(\$7,852,671)	(\$12,650,229)	(\$3,717,878)	\$77,392,565	\$97,012,752	\$165,525,143
Radio, Television, Electronics Stores-443112	(\$5,167,841)	(\$29,112,836)	\$11,047,262	\$6,421,200	\$172,676	(\$3,879,668)	\$15,736,275	\$20,136,224	\$14,788,632
Home Furnishing Stores-4422	(\$2,022,318)	(\$7,833,725)	\$5,015,457	\$5,953,485	\$314,013	\$3,371,435	\$4,494,904	\$6,828,846	(\$85,589,216)
Home Centers-44411	\$23,567,380	\$18,838,382	\$30,866,304	\$18,083,540	(\$131,474,073)	(\$51,950,666)	\$32,344,946	(\$12,732,631)	\$72,278,057
Book Stores-451211	\$2,334,103	(\$11,397,201)	\$3,257,771	\$1,473,040	\$1,349,019	\$287,915	\$4,126,168	\$2,963,309	\$23,084,734
In-Line Comparison Retailers	\$46,548,210	(\$58,130,619)	\$25,575,419	\$925,180	\$23,600,750	(\$10,495,211)	\$69,028,211	\$119,449,990	\$147,656,913
Clothing Stores-4481	\$26,969,773	(\$47,433,422)	\$7,341,490	\$162,647	\$17,828,591	(\$5,728,185)	\$42,081,556	\$50,042,453	(\$75,542,320)
Food & Beverage	\$82,022,144	\$3,577,516	\$40,198,254	\$13,439,627	\$4,250,392	\$25,791,903	\$107,492,860	\$61,491,699	\$660,946,221
Full-Service Restaurants-7221	\$44,120,882	(\$15,102,843)	\$10,524,750	\$18,160,837	(\$11,359,677)	\$19,618,169	\$53,950,864	\$65,716,068	\$233,219,535
Limited Service Eating Places-7222	\$31,165,423	\$13,025,347	\$24,754,329	(\$8,918,641)	\$10,457,949	\$3,101,282	\$46,458,245	(\$15,615,102)	\$311,375,914
Drinking Places Alcoholic Beverages-7224	\$6,735,839	\$5,655,011	\$4,919,175	\$4,197,430	\$5,152,121	\$3,072,452	\$7,083,752	\$11,390,733	\$116,350,772
Neighborhood Retailers	\$43,781,200	(\$99,866,857)	\$54,128,588	\$44,421,199	(\$68,922,841)	(\$9,061,273)	\$128,818,705	\$110,572,382	\$428,787,675
Supermarket, Grocery -44511	\$29,958,697	(\$117,214,127)	\$8,018,601	\$37,995,063	(\$83,058,825)	(\$18,990,541)	\$72,148,291	\$62,157,841	\$26,094,712
Pharmacies and Drug Stores-44611	\$21,004,531	\$10,203,251	\$21,175,190	\$2,924,482	\$4,491,888	\$9,901,225	\$24,779,643	(\$15,606,912)	\$177,369,317
TOTALS	\$202,990,677	(\$227,606,766)	\$227,019,034	\$93,268,337	(\$165,177,679)	(\$38,036,009)	\$473,048,927	\$443,313,131	\$1,528,795,239

1/ Assumes a range of % additional demand on top of household and office demand: Major Comparison Retailers, 10%; In-Line Comparison Retailers, 10%; Food and Beverage, 20%; Neighborhood Retailers, 5%.

SOURCE: RCLCO; utilizing data in previous exhibits.

Exhibit 29B

**TOTAL RETAIL DEMAND-SUPPLY GAP ANALYSIS, 2020 1/
CITY OF ALEXANDRIA, ARLINGTON COUNTY, AND MARKET AREAS
OCTOBER 2008**

Retail Categories	City of Alexandria	Arlington County	Mt. Vernon/Braddock	Crystal City/ Pentagon City	Old Town/ Carlyle	Western Alexandria	Shirlington/ Fairlington	Columbia Pike	Rosslyn/Ballston
Major Comparison Retailers	(\$20,511,499)	\$612,573,627	(\$49,831,387)	(\$77,116,091)	\$17,256,105	(\$106,377,215)	\$169,290,138	\$138,647,123	\$249,802,344
Department Stores Excluding Leased Departments-4521	(\$1,965,251)	\$145,843,963	(\$67,811,730)	(\$144,085,355)	\$72,699,759	(\$46,638,297)	\$66,210,331	\$49,224,926	\$117,653,961
Radio, Television, Electronics Stores-443112	\$10,236,246	\$42,330,401	\$604,667	(\$27,375,880)	\$818,005	(\$6,802,955)	\$12,125,067	\$12,240,555	\$34,629,710
Home Furnishing Stores-4422	(\$63,279,884)	(\$3,131,516)	\$1,750,392	(\$1,269,237)	(\$53,432,593)	(\$20,865,278)	\$13,265,767	\$10,492,840	(\$29,312,341)
Home Centers-44411	\$48,429,941	\$208,078,858	\$23,197,380	\$45,899,941	\$33,511,219	(\$34,147,568)	\$39,974,431	\$29,744,711	\$65,287,233
Book Stores-451211	\$10,318,464	\$25,062,227	(\$3,123,133)	\$5,996,789	\$4,961,486	\$4,638,415	\$3,730,016	\$4,820,054	\$7,404,703
In-Line Comparison Retailers	\$144,195,892	\$31,647,821	\$1,768,237	(\$272,365,232)	\$33,886,996	\$39,722,828	\$72,812,718	\$59,958,682	\$126,471,117
Clothing Stores-4481	\$61,588,574	(\$90,446,831)	(\$12,281,343)	(\$242,992,392)	\$6,727,831	\$29,887,894	\$39,849,220	\$31,797,959	\$52,079,256
Food & Beverage	\$204,804,381	\$359,243,632	\$6,178,763	\$16,558,418	\$52,659,077	\$91,426,679	\$22,238,509	\$83,288,658	\$158,828,066
Full-Service Restaurants-7221	\$31,752,015	\$132,730,291	(\$10,819,403)	(\$31,421,459)	\$40,861,766	(\$16,991,997)	\$40,206,603	\$40,206,603	\$81,371,437
Limited Service Eating Places-7222	\$135,537,929	\$176,338,799	\$12,659,750	\$35,606,892	\$38,070,806	\$41,742,804	\$30,921,945	\$35,980,824	\$58,935,493
Drinking Places Alcoholic Beverages-7224	\$37,514,437	\$50,174,541	\$4,338,415	\$12,372,985	\$16,342,735	\$8,822,110	\$8,308,561	\$7,101,231	\$18,521,136
Neighborhood Retailers	\$261,581,787	\$390,238,997	\$9,853,227	\$126,261,529	\$88,207,689	\$90,027,724	\$54,984,467	\$106,060,638	\$126,552,288
Supermarket, Grocery -44511	\$89,783,380	\$124,926,638	(\$25,730,354)	\$62,033,587	\$50,881,114	\$53,216,053	(\$10,180,625)	\$60,039,420	\$25,812,402
Pharmacies and Drug Stores-44611	\$74,035,130	\$137,232,942	\$21,303,728	\$32,892,628	\$19,569,447	\$6,366,949	\$37,016,730	\$19,396,416	\$46,427,937
TOTALS	\$590,070,561	\$1,393,704,077	(\$32,031,160)	(\$206,661,375)	\$192,009,868	\$114,800,015	\$319,325,831	\$387,955,101	\$661,653,816

Retail Categories	Far Western Alexandria	Bailey's Crossroads	Franconia	Huntington	Route 1/ Hybla Valley	Oxon Hill	SE Washington DC	Southern Downtown DC	TOTAL OF MARKET AREAS
Major Comparison Retailers	\$37,867,755	(\$62,836,874)	\$117,475,691	\$44,374,198	(\$95,417,283)	(\$26,715,873)	\$188,331,462	\$222,984,104	\$767,734,196
Department Stores Excluding Leased Departments-4521	\$25,613,608	\$23,102,446	\$43,885,061	(\$4,001,333)	(\$1,994,069)	\$3,331,043	\$86,367,780	\$125,739,633	\$349,297,764
Radio, Television, Electronics Stores-443112	(\$4,494,036)	(\$28,163,315)	\$11,920,281	\$7,370,049	\$2,672,632	(\$2,299,095)	\$17,675,374	\$26,727,941	\$57,649,002
Home Furnishing Stores-4422	(\$1,604,816)	(\$7,135,312)	\$5,791,528	\$6,644,841	\$2,405,708	\$4,515,771	\$5,692,270	\$11,577,940	(\$51,482,520)
Home Centers-44411	\$24,448,625	\$20,783,190	\$33,153,464	\$19,764,632	(\$125,158,066)	(\$48,330,002)	\$35,973,419	(\$301,406)	\$163,801,203
Book Stores-451211	\$2,731,601	(\$11,092,580)	\$3,569,945	\$1,784,938	\$2,062,220	\$706,357	\$4,641,014	\$5,685,477	\$38,517,303
In-Line Comparison Retailers	\$50,883,009	(\$53,584,828)	\$29,924,928	\$5,249,895	\$34,974,931	(\$2,749,472)	\$78,776,870	\$153,087,822	\$358,818,500
Clothing Stores-4481	\$29,137,696	(\$44,856,238)	\$9,746,842	\$2,582,997	\$24,381,701	(\$1,282,808)	\$47,772,887	\$67,835,240	\$40,386,743
Food & Beverage	\$80,898,277	\$3,627,150	\$40,060,021	\$14,057,828	\$13,901,918	\$32,499,719	\$110,985,555	\$92,977,860	\$820,186,497
Full-Service Restaurants-7221	\$43,364,561	(\$15,039,444)	\$10,397,733	\$18,443,555	(\$6,528,704)	\$22,885,477	\$55,627,560	\$81,346,930	\$311,950,152
Limited Service Eating Places-7222	\$30,696,800	\$13,042,244	\$24,705,585	(\$8,641,666)	\$14,724,578	\$6,125,693	\$48,042,735	(\$1,807,719)	\$380,806,763
Drinking Places Alcoholic Beverages-7224	\$6,836,915	\$5,624,349	\$4,956,704	\$4,255,938	\$5,706,044	\$3,488,550	\$7,315,260	\$13,438,648	\$127,429,582
Neighborhood Retailers	\$60,273,790	(\$81,225,230)	\$70,960,873	\$61,173,826	(\$28,843,459)	\$17,932,236	\$171,377,682	\$209,996,686	\$1,083,593,966
Supermarket, Grocery -44511	\$37,988,972	(\$107,723,099)	\$16,242,274	\$46,310,078	(\$62,726,577)	(\$5,060,374)	\$94,983,035	\$109,168,317	\$345,254,222
Pharmacies and Drug Stores-44611	\$24,492,109	\$14,489,578	\$24,926,172	\$6,900,858	\$13,873,075	\$16,228,250	\$34,905,871	\$7,137,945	\$325,927,694
TOTALS	\$229,922,830	(\$194,019,783)	\$258,421,512	\$124,855,746	(\$75,383,894)	\$20,966,610	\$549,471,569	\$679,046,473	\$3,030,333,160

1/ Assumes a range of % additional demand on top of household and office demand: Major Comparison Retailers, 10%; In-Line Comparison Retailers, 10%; Food and Beverage, 20%; Neighborhood Retailers, 5%. SOURCE: RCLCO; utilizing data in previous exhibits.

Exhibit 30A

**SUBJECT SITE CAPTURE RATE ANALYSIS, 2020 1/
TARGET MARKET AREAS
OCTOBER 2008**

Retail Categories	Mt. Vernon/Braddock	Crystal City/ Pentagon City	Old Town/ Carlyle	Western Alexandria	Shirlington/ Fairlington	Columbia Pike	Rosslyn/Ballston
Major Comparison Retailers							
Department Stores Excluding Leased Departments-4521	50.0%	40.0%	30.0%	15.0%	10.0%	7.5%	10.0%
Radio, Television, Electronics Stores-443112	40.0%	25.0%	20.0%	20.0%	10.0%	5.0%	7.5%
Home Furnishing Stores-4422	75.0%	50.0%	66.0%	35.0%	20.0%	10.0%	10.0%
Home Centers-44411	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Book Stores-451211	75.0%	60.0%	66.0%	35.0%	25.0%	15.0%	15.0%
In-Line Comparison Retailers							
Clothing Stores-4481	20.0%	15.0%	10.0%	10.0%	5.0%	2.5%	3.0%
Remainder of In-Line Comparison	30.0%	25.0%	20.0%	15.0%	10.0%	5.0%	3.0%
Food & Beverage							
Full-Service Restaurants-7221	20.0%	10.0%	15.0%	7.5%	5.0%	2.5%	2.0%
Limited Service Eating Places-7222	25.0%	10.0%	15.0%	5.0%	3.0%	2.0%	1.0%
Drinking Places Alcoholic Beverages-7224	20.0%	10.0%	15.0%	7.5%	3.0%	2.0%	1.0%
Neighborhood Retailers							
Supermarket, Grocery -44511	25.0%	15.0%	5.0%	2.0%	3.0%	2.0%	1.0%
Pharmacies and Drug Stores-44611	20.0%	5.0%	3.0%	1.0%	1.0%	1.0%	0.0%
Remainder of Neighborhood Retail	25.0%	15.0%	5.0%	2.0%	3.0%	1.0%	1.0%

Retail Categories	Far Western Alexandria	Bailey's Crossroads	Franconia	Huntington	Route 1/ Hybla Valley	Oxon Hill	SE Washington DC	Southern Downtown DC
Major Comparison Retailers								
Department Stores Excluding Leased Departments-4521	2.5%	1.0%	2.5%	5.0%	2.5%	12.5%	7.5%	5.0%
Radio, Television, Electronics Stores-443112	2.5%	1.0%	2.5%	7.5%	7.5%	10.0%	10.0%	2.5%
Home Furnishing Stores-4422	5.0%	2.0%	5.0%	15.0%	15.0%	20.0%	20.0%	10.0%
Home Centers-44411	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Book Stores-451211	5.0%	2.0%	5.0%	15.0%	15.0%	25.0%	10.0%	5.0%
In-Line Comparison Retailers								
Clothing Stores-4481	2.0%	1.0%	2.0%	3.0%	2.0%	10.0%	10.0%	2.0%
Remainder of In-Line Comparison	2.0%	1.0%	2.0%	3.0%	2.0%	10.0%	10.0%	2.0%
Food & Beverage								
Full-Service Restaurants-7221	2.0%	1.0%	5.0%	10.0%	7.5%	7.5%	3.0%	2.0%
Limited Service Eating Places-7222	1.0%	0.0%	3.0%	5.0%	5.0%	5.0%	3.0%	1.0%
Drinking Places Alcoholic Beverages-7224	1.0%	0.0%	3.0%	5.0%	5.0%	7.5%	3.0%	1.0%
Neighborhood Retailers								
Supermarket, Grocery -44511	0.0%	0.0%	0.0%	2.0%	1.0%	2.0%	2.5%	0.0%
Pharmacies and Drug Stores-44611	0.0%	0.0%	0.0%	1.0%	0.0%	0.0%	1.0%	0.0%
Remainder of Neighborhood Retail	0.0%	0.0%	0.0%	1.0%	1.0%	1.0%	2.0%	0.0%

1/ Based upon RCLCOs analysis of current and future competitive market.
SOURCE: RCLCO; utilizing data in previous exhibits.

Exhibit 30B

**CAPTURED SUBJECT SITE EXPENDITURES, 2020
TARGET MARKET AREAS
OCTOBER 2008**

Retail Categories	Supportable SF 1/	TOTALS	Mt. Vernon/Braddock	Crystal City/ Pentagon City	Old Town/ Carlyle	Western Alexandria	Shirlington/ Fairlington	Columbia Pike	Rosslyn/Ballston
Major Comparison Retailers									
Department Stores Excluding Leased Departments-4521	273,417	\$164,050,471	\$22,077,607	\$41,376,743	\$31,974,561	\$11,744,934	\$7,486,538	\$5,035,092	\$18,287,711
Radio, Television, Electronics Stores-443112	51,625	\$30,975,137	\$4,281,723	\$5,953,963	\$4,867,838	\$3,806,494	\$1,821,863	\$793,938	\$3,209,906
Home Furnishing Stores-4422	83,775	\$50,264,967	\$6,392,097	\$9,477,620	\$12,683,159	\$4,804,574	\$2,894,284	\$1,088,940	\$2,918,002
Home Centers-44411	0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Book Stores-451211	43,354	\$26,012,473	\$2,312,693	\$6,039,809	\$6,989,191	\$2,123,742	\$1,502,721	\$723,008	\$2,816,166
In-Line Comparison Retailers									
Clothing Stores-4481	94,766	\$47,383,193	\$5,657,852	\$9,876,124	\$6,793,417	\$4,895,273	\$2,357,369	\$1,073,048	\$3,532,443
Remainder of In-Line Comparison	114,094	\$57,047,111	\$6,256,018	\$14,569,152	\$12,178,657	\$5,668,649	\$3,638,431	\$1,584,020	\$3,124,523
Food & Beverage									
Full-Service Restaurants-7221	107,505	\$64,503,000	\$7,179,885	\$9,800,581	\$15,330,581	\$5,256,500	\$3,231,849	\$1,452,869	\$3,678,729
Limited Service Eating Places-7222	80,389	\$48,233,686	\$7,842,138	\$8,830,125	\$13,874,896	\$3,098,817	\$1,694,292	\$1,038,144	\$1,669,012
Drinking Places Alcoholic Beverages-7224	12,845	\$7,706,807	\$867,683	\$1,540,983	\$2,451,410	\$661,658	\$249,257	\$142,025	\$284,493
Neighborhood Retailers									
Supermarket, Grocery-44511	119,027	\$59,513,310	\$16,150,916	\$19,129,717	\$6,517,645	\$2,392,017	\$3,187,273	\$2,170,025	\$2,378,208
Pharmacies and Drug Stores-44611	26,405	\$13,202,287	\$5,760,028	\$3,035,274	\$1,852,906	\$557,529	\$496,995	\$477,149	\$0
Remainder of Neighborhood Retail	66,695	\$33,347,741	\$8,475,273	\$12,852,522	\$4,442,881	\$1,263,506	\$1,795,073	\$530,734	\$1,523,882

Retail Categories	Far Western Alexandria	Bailey's Crossroads	Franconia	Huntington	Route 1/ Hybla Valley	Oxon Hill	SE Washington DC	Southern Downtown DC
Major Comparison Retailers								
Department Stores Excluding Leased Departments-4521	\$1,466,338	\$466,706	\$1,270,941	\$2,185,283	\$1,518,609	\$5,057,472	\$6,495,517	\$7,606,420
Radio, Television, Electronics Stores-443112	\$340,662	\$105,618	\$298,007	\$819,211	\$1,066,293	\$917,765	\$1,885,921	\$805,935
Home Furnishing Stores-4422	\$471,223	\$152,788	\$547,482	\$1,204,919	\$1,780,167	\$1,342,597	\$2,340,777	\$2,166,340
Home Centers-44411	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Book Stores-451211	\$233,739	\$75,222	\$183,963	\$505,908	\$617,209	\$551,330	\$464,101	\$873,671
In-Line Comparison Retailers								
Clothing Stores-4481	\$748,453	\$293,724	\$634,257	\$821,765	\$747,617	\$2,544,986	\$5,482,147	\$1,924,716
Remainder of In-Line Comparison	\$583,711	\$235,034	\$480,566	\$628,547	\$553,398	\$1,827,504	\$3,801,070	\$1,917,831
Food & Beverage								
Full-Service Restaurants-7221	\$1,038,535	\$413,692	\$2,002,942	\$3,849,556	\$3,644,605	\$2,328,005	\$2,024,515	\$3,270,156
Limited Service Eating Places-7222	\$469,003	\$0	\$1,060,877	\$1,669,276	\$2,153,184	\$1,418,427	\$1,873,923	\$1,541,572
Drinking Places Alcoholic Beverages-7224	\$68,369	\$0	\$148,701	\$235,579	\$285,302	\$261,641	\$219,458	\$290,247
Neighborhood Retailers								
Supermarket, Grocery-44511	\$0	\$0	\$0	\$1,297,664	\$952,365	\$1,336,399	\$4,001,080	\$0
Pharmacies and Drug Stores-44611	\$0	\$0	\$0	\$311,436	\$0	\$0	\$710,970	\$0
Remainder of Neighborhood Retail	\$0	\$0	\$0	\$341,539	\$487,690	\$314,918	\$1,319,721	\$0

1/ Based upon sales per square foot thresholds: \$6000 per SF for Major Comparison and Food and Beverage; \$500 per SF for In-Line Comparison and Neighborhood Retail.
SOURCE: RCLCO; utilizing data in previous exhibits.

Exhibit 30C

**PERCENT OF CAPTURED SUBJECT SITE EXPENDITURES BY MARKET AREA, 2020
TARGET MARKET AREAS
OCTOBER 2008**

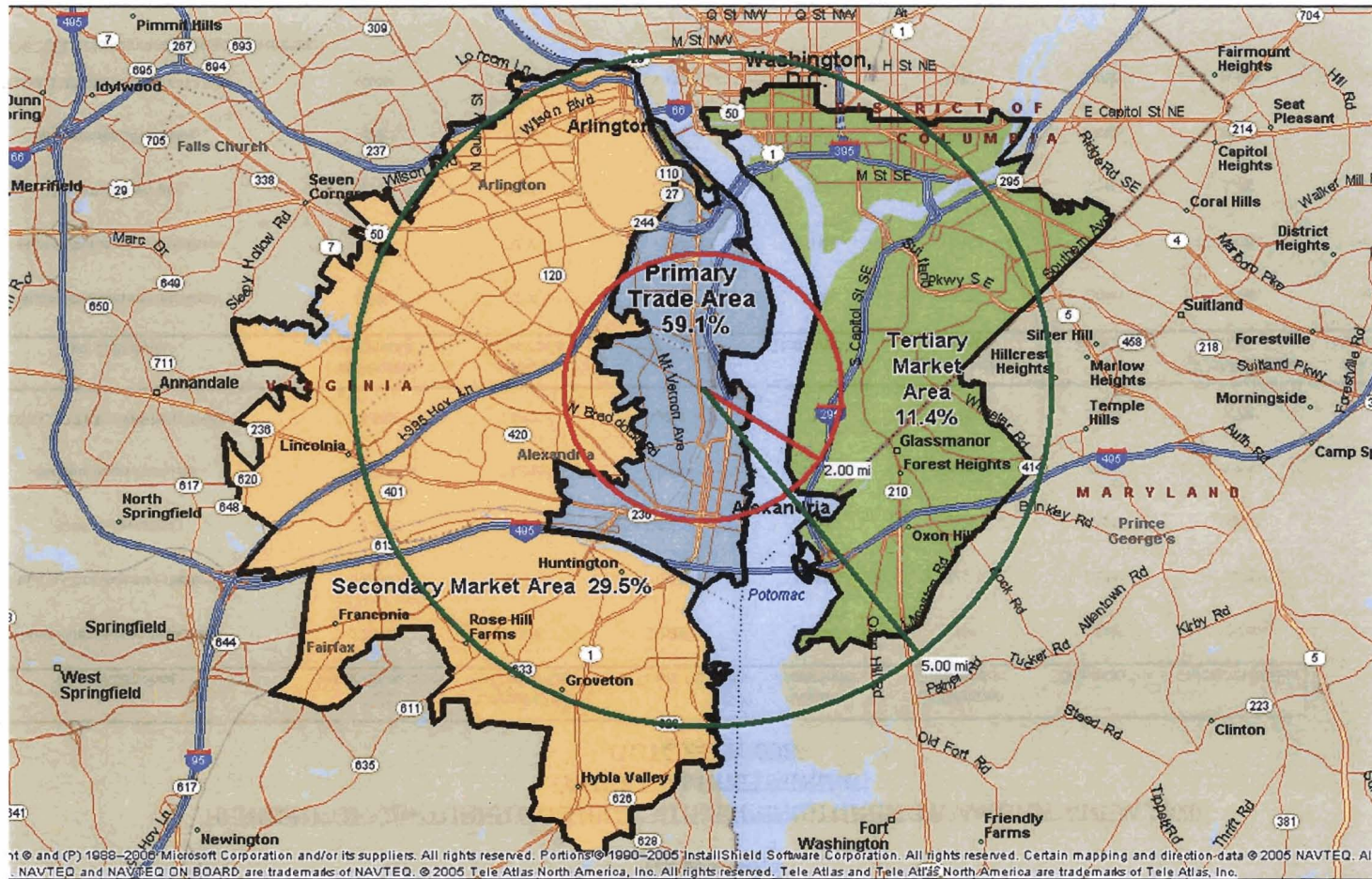
Retail Categories	Mt. Vernon/Braddock	Crystal City/ Pentagon City	Old Town/ Carlyle	Western Alexandria	Shirlington/ Fairlington	Columbia Pike	Rosslyn/Ballston
Major Comparison Retailers	12.9%	23.2%	20.8%	8.3%	5.1%	2.8%	10.0%
In-Line Comparison Retailers	11.4%	23.4%	18.2%	10.1%	5.7%	2.5%	6.4%
Food & Beverage	13.2%	16.7%	26.3%	7.5%	4.3%	2.2%	4.7%
Neighborhood Retailers	28.6%	33.0%	12.1%	4.0%	5.2%	3.0%	3.7%
TOTAL RETAIL EXPENDITURES	15.5%	23.7%	19.9%	7.7%	5.0%	2.7%	7.2%

Retail Categories	Far Western Alexandria	Bailey's Crossroads	Franconia	Huntington	Route 1/ Hybla Valley	Oxon Hill	SE Washington DC	Southern Downtown DC
Major Comparison Retailers	0.9%	0.3%	0.8%	1.7%	1.8%	2.9%	4.1%	4.2%
In-Line Comparison Retailers	1.3%	0.5%	1.1%	1.4%	1.2%	4.2%	8.9%	3.7%
Food & Beverage	1.3%	0.3%	2.7%	4.8%	5.1%	3.3%	3.4%	4.2%
Neighborhood Retailers	0.0%	0.0%	0.0%	1.8%	1.4%	1.6%	5.7%	0.0%
TOTAL RETAIL EXPENDITURES	0.9%	0.3%	1.1%	2.3%	2.3%	3.0%	5.1%	3.4%

SOURCE: RCLCO; utilizing data in previous exhibits.

Exhibit 31A

MAP OF TRADE AREA SUBMARKETS BY PERCENTAGE OF DEMAND, 2020 -- ALL RETAIL 1/
 POTOMAC YARD STUDY AREA
 OCTOBER 2008

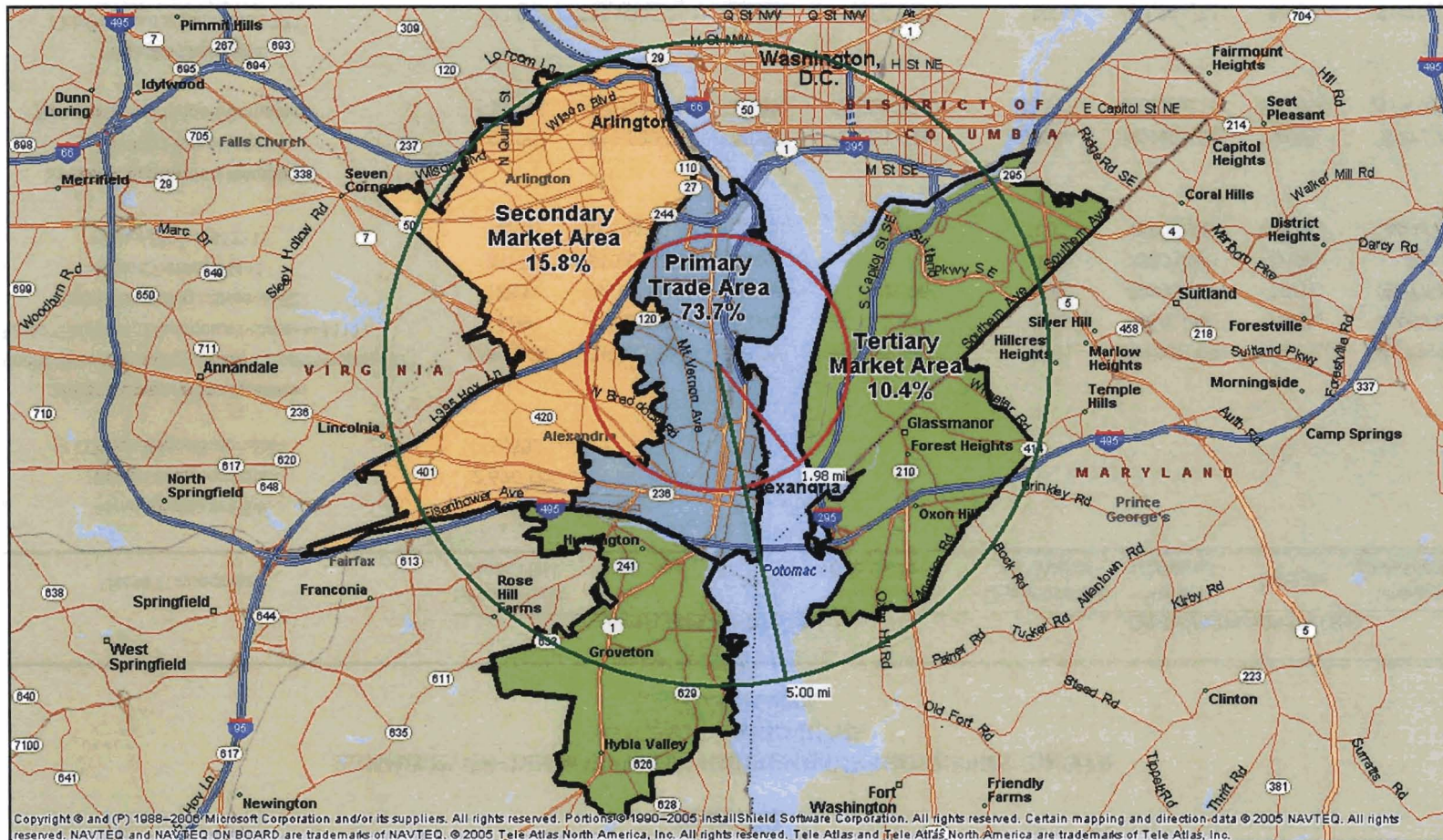


1/ Does not include demand from households and workers on the site; this demand is incorporated in Exhibits 32 and 33.

SOURCE: RCLCO

Exhibit 31B

MAP OF TRADE AREA SUBMARKETS BY PERCENTAGE OF DEMAND, 2020 -- NEIGHBORHOOD RETAIL 1/
 POTOMAC YARD STUDY AREA
 OCTOBER 2008



1/ Does not include demand from households and workers on the site; this demand is incorporated in Exhibits 32 and 33.

SOURCE: RCLCO

Exhibit 32

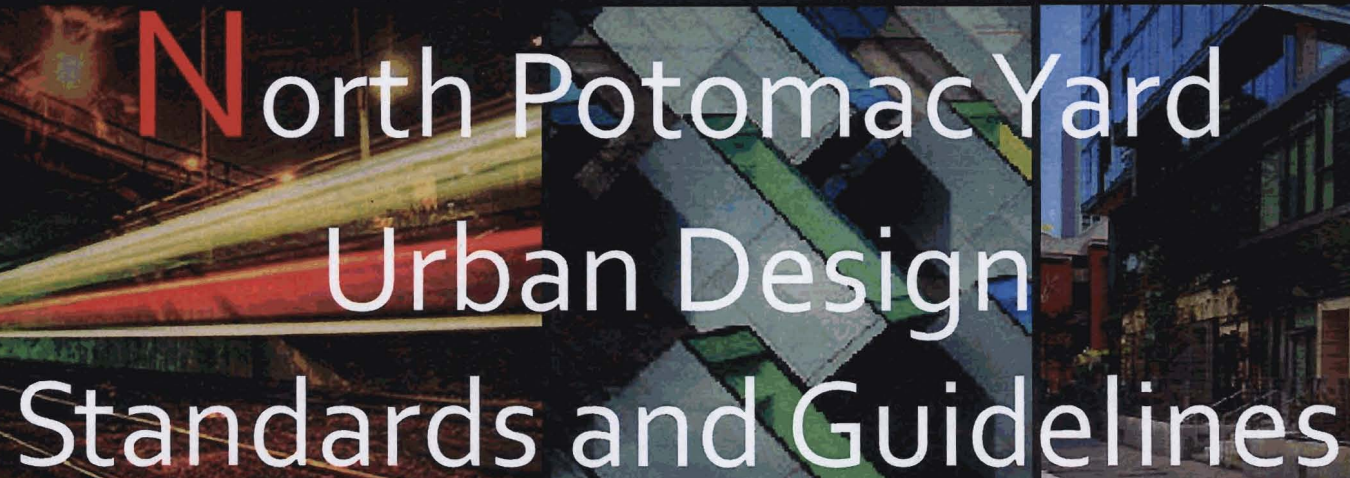
**SUMMARY OF DEMAND FROM HOUSEHOLDS AND OFFICE ON SITE
POTOMAC YARD SITES
OCTOBER 2008**

Retail Categories	Households on the Site				Office Workers on the Site			
	Expenditures per HH	Retail Demand	Capture	Captured Expenditures	Expenditures per Worker	Retail Demand	Capture	Captured Expenditures
Households on Site	5,814							
Office Space on Site	2,596,000							
Office Workers on Site	9,553							
Major Comparison Retailers								
Department Stores Excluding Leased Departments-4521	\$3,209	\$18,657,254	75.0%	\$13,992,941	\$381	\$3,638,653	75.0%	\$2,728,990
Radio, Television, Electronics Stores-443112	\$786	\$4,571,216	75.0%	\$3,428,412	\$63	\$606,442	75.0%	\$454,832
Home Furnishing Stores-4422	\$631	\$3,671,048	75.0%	\$2,753,286	\$32	\$303,221	75.0%	\$227,416
Home Centers-44411	\$1,734	\$10,083,238	0.0%	\$0	\$32	\$303,221	0.0%	\$0
Book Stores-451211	\$213	\$1,241,276	75.0%	\$930,957	\$63	\$606,442	75.0%	\$454,832
In-Line Comparison Retailers								
Clothing Stores-4481	\$2,053	\$11,936,738	30.0%	\$3,581,021	\$254	\$2,425,769	30.0%	\$727,731
Remainder of In-Line Comparison	\$1,476	\$8,581,443	50.0%	\$4,290,722	\$317	\$3,032,211	50.0%	\$1,516,106
Food & Beverage								
Full-Service Restaurants-7221	\$2,552	\$14,835,254	25.0%	\$3,708,813	\$509	\$4,864,721	25.0%	\$1,216,180
Limited Service Eating Places-7222	\$2,211	\$12,855,448	25.0%	\$3,213,862	\$509	\$4,864,721	25.0%	\$1,216,180
Drinking Places Alcoholic Beverages-7224	\$294	\$1,706,527	25.0%	\$426,632	\$113	\$1,081,049	25.0%	\$270,262
Neighborhood Retailers								
Supermarket, Grocery -44511	\$4,757	\$27,656,985	90.0%	\$24,891,287	\$342	\$3,269,515	90.0%	\$2,942,563
Pharmacies and Drug Stores-44611	\$2,128	\$12,369,917	90.0%	\$11,132,926	\$128	\$1,226,068	90.0%	\$1,103,461
Remainder of Neighborhood Retail	\$2,437	\$14,169,704	90.0%	\$12,752,733	\$385	\$3,678,204	90.0%	\$3,310,383
TOTALS				\$85,103,591				\$16,168,936

Exhibit 33

**SUMMARY OF DEMAND PROJECTIONS
POTOMAC YARD SITES
OCTOBER 2008**

Retail Categories	Demand from Market Areas	Demand from HHs and Office Workers on Site	% from On-Site HHs/Workers	Sales per SF Thresholds	Supportable SF - Market Areas	Supportable SF - On-Site HHs/Workers	Supportable SF - Total
Major Comparison Retailers					452,172	41,619	493,791
Department Stores Excluding Leased Departments-4521	\$164,050,471	\$16,721,931	9.3%	\$600	273,417	27,870	301,287
Radio, Television, Electronics Stores-443112	\$30,975,137	\$3,883,244	11.1%	\$600	51,625	6,472	58,097
Home Furnishing Stores-4422	\$50,264,967	\$2,980,702	5.6%	\$600	83,775	4,968	88,743
Home Centers-44411	\$0	\$0	N/A	\$600	0	0	0
Book Stores-451211	\$26,012,473	\$1,385,789	5.1%	\$600	43,354	2,310	45,664
In-Line Comparison Retailers					208,861	20,231	229,092
Clothing Stores-4481	\$47,383,193	\$4,308,752	8.3%	\$500	94,766	8,618	103,384
Remainder of In-Line Comparison	\$57,047,111	\$5,806,827	9.2%	\$500	114,094	11,614	125,708
Food & Beverage					200,739	16,753	217,492
Full-Service Restaurants-7221	\$64,503,000	\$4,924,994	7.1%	\$600	107,505	8,208	115,713
Limited Service Eating Places-7222	\$48,233,686	\$4,430,042	8.4%	\$600	80,389	7,383	87,773
Drinking Places Alcoholic Beverages-7224	\$7,706,807	\$696,894	8.3%	\$600	12,845	1,161	14,006
Neighborhood Retailers					212,127	112,267	324,393
Supermarket, Grocery -44511	\$59,513,310	\$27,833,850	31.9%	\$500	119,027	55,668	174,694
Pharmacies and Drug Stores-44611	\$13,202,287	\$12,236,387	48.1%	\$500	26,405	24,473	50,877
Remainder of Neighborhood Retail	\$33,347,741	\$16,063,117	32.5%	\$500	66,695	32,126	98,822
TOTALS	\$602,240,183	\$101,272,527	14.4%		1,073,898	190,871	1,264,769



North Potomac Yard Urban Design Standards and Guidelines

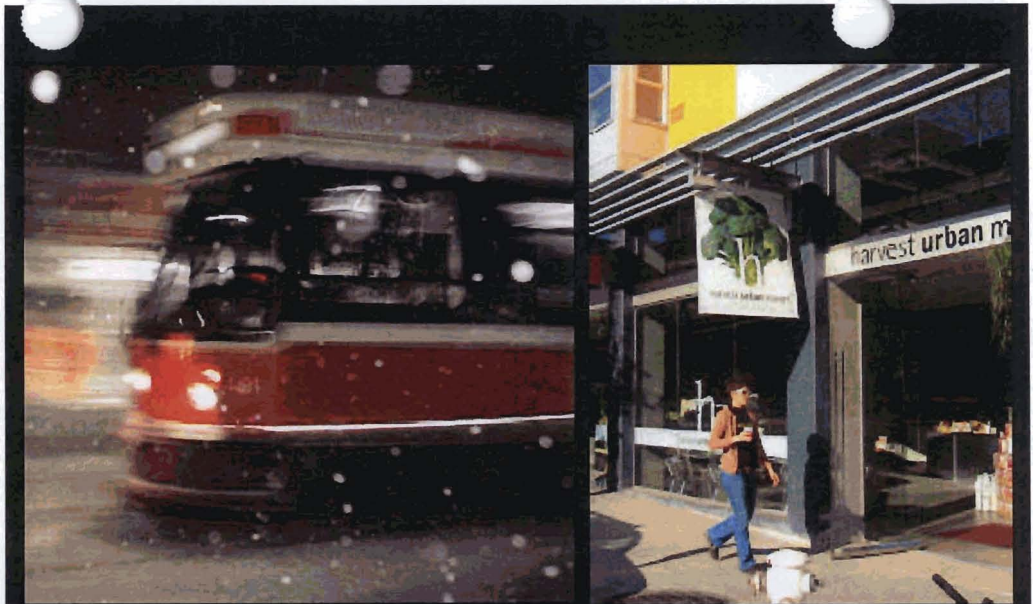
Implementing A Complete Sustainable Community

"... The city is in itself the powerful symbol of a complex society. If visually well set forth, it can also have strong expressive meaning, ...The common hopes and pleasures, the sense of community may be made flesh. Above all, if the environment is visibly organized and sharply identified, then the citizen can inform it with his own meanings and connections. Then it will become a true place, remarkable and unmistakable." *Kevin Lynch*

Adopted by City Council _____ 2010

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A community defined by transit, retail, open space and design excellence.



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1 Introduction

A. Intent of the Standards and Guidelines

The Potomac Yard Design Standards and Guidelines are intended to provide requirements and guidance in written and graphic form for private and public projects in North Potomac Yard – Landbay F. Projects within Landbay F are required to comply with all Design Standards and are strongly encouraged to comply with applicable Guidelines to ensure that the built environment exhibits the highest standard of architectural design and sustainability.

The North Potomac Yard Small Area Plan is the overarching policy document that guides development within Landbay F. This document augments the North Potomac Yard Small Area Plan, the CDD Concept Plan and CDD conditions and provides specific requirements for future spaces and buildings within North Potomac Yard. Buildings, open space and the public realm will be evaluated based on compliance with the applicable approvals, requirements and this document.

B. Development Principles

The following general design principles shall be applied as part of the development review process for each building and/or block:

General

- 1.1 A mixed-use development and concentrations of density and height at strategic locations, including adjacent to the metrorail station.
- 1.2 Identifiable neighborhoods and a retail core on East Reed Avenue, Main Line Boulevard, connections to the metro station, and to Landbay G.
- 1.3 Improvement and enhancement of the Route 1 frontage.
- 1.4 Development of an orthogonal street grid pattern.
- 1.5 A recognition of the history of the site should provide educational opportunities and inspire creative development and design for the open space, public spaces and buildings.



General—Continued

- 1.6 Integrate sustainability practices into site design, building construction, and operational strategies.
- 1.7 Create a varied mixed use urban environment for each neighborhood that attracts residents, employees and visitors to shop, play, recreate, work, and experience of Potomac Yard as a local and regional destination.

Open Space

- 1.8 Use of parks as a plan defining element in each neighborhood.
- 1.9 Create extensive open space opportunities, access to Four Mile Run trail connections and view corridors
- 1.10 Attention to design of landscape elements as an extension to the building form, with creative and distinctive design fitting the varied settings and history of North Potomac Yard, and the intended programs for active and passive use.

Streets

- 1.11 A hierarchy of streets.
- 1.12 Integrate appropriate levels of on- and off-street parking within the overall development, meeting functional requirements while creating a buffer for pedestrians and minimizing the need for underground and/or structured parking.
- 1.13 Design streets that are pedestrian friendly. Streets need to be designed as low speed, local serving streets that enhance bicycle and transit use.
- 1.14 Use of innovative green and sustainable materials and design for the streets and sidewalks

Public Realm

- 1.15 A pedestrian-oriented environment.
- 1.16 Incorporate the provision of safe, efficient, and convenient pedestrian and bicycle circulation systems that connect activity areas, transit hubs, and open spaces and provide public access to Four Mile Run.
- 1.17 Sidewalks should be given careful consideration and detail to support the walkability and sustainability of North Potomac Yard.

Buildings

- 1.18 Create an urban building scale and relationship between buildings, streets and open spaces that ensures and maximizes walkability, creates compact development, and maximizes the use of transit and the Metrorail station.
- 1.19 Select appropriate building materials, textures, facades, and treatments that work together to establish a high quality urban environment.
- 1.20 Use variety in building materials, orientation, and dimensions to create an interesting and varied skyline.
- 1.21 Achieve a balance between the retention and enhancement of natural resources adjacent to Four Mile Run.

2 Neighborhoods— Districts

Intent

A defining element of Alexandria, is the distinct series of neighborhoods. The differences in identity, character and scale of the various neighborhoods compliment each other and contribute to the richness of the urban experience of Alexandria. Building on the City's longstanding foundation of a collection of distinct neighborhoods, the guidelines and standards require the creation of three-distinct urban neighborhoods:

Crescent Gateway Neighborhood

Market Neighborhood

Metro Square Neighborhood

The function of each neighborhood is unique, and the uses and design strategies employed within each neighborhood are required to be unique and varied in order to reinforce the individuality of each neighborhood. Through the development review process, the individuality of each neighborhood is required to be expressed through the architecture, design, and open space to reinforce the individual character of each neighborhood. The street grid and consistent streetscape will visually unify the neighborhoods, similar to other neighborhoods within the City.



Figure 2. Neighborhoods



Crescent Gateway Neighborhood

The Neighborhood

The defining element of this neighborhood will be the 2.5 acre crescent shaped park that will be a gateway to the City from Potomac Avenue and will also provide a “residential address” and park frontage for this predominately residential neighborhood. The buildings adjacent to the crescent shaped park are required to be curved to reinforce the curved shape of the park. The park and neighborhood will have views of the Nations Capitol and the Potomac River. A school site is reserved within the neighborhood, which, if constructed, will reinforce the residential character of the neighborhood as well as helping to activate the park.

The blocks fronting onto Four Mile Run provide the City with an opportunity to reclaim a part of its waterfront as envisioned by the Four Mile Run Master Plan and accompanying Design Guidelines.

The neighborhood will reflect the spirit of the city’s traditional open space oriented neighborhoods and create a unique and desirable place to live within North Potomac Yard.

The Street and Block Plan

The Street and Block Plan will primarily orthogonal, except in curved street (Crescent Place) adjustment to the Crescent Park. A portion of this neighborhood contains Water Street. (See Figure 3)

Figure 3. Crescent Gateway Neighborhood

A residential neighborhood defined by the Crescent Park, curved building forms and relationship to Four Mile Run



The Neighborhood Parks

Crescent Park

This 2.5 acre park is required to be located in the northeastern portion of the neighborhood and serve as a focal element of the neighborhood and a connection to the adjoining Landbay-K. This park is required to be crescent shaped and incorporate a water-storm water amenity as part of its design. No more than 50% of the park may be occupied for water-storm water amenities. The southern portion of the park will be bordered by a street with on street parking on the building side. A prominent location in the Crescent Park should be reserved for a possible civic use. The enhancement of additional open space, less impervious surfaces, and elimination of the surface parking, additional landscaping, and trails will help to revitalize Four Mile Run.

As part of the Four Mile Run improvements, the bridge crossing Four Mile Run will be required to be incorporated as part of the open space design. There is additional City owned land north of this bridge, which is required of this developer to be designed and developed to enhance the visual, open space, and recreational qualities of this neighborhood.

Other Parks—Open Space

In addition to the Crescent Park, a ground level open space— park is required to be located on the central portion of Blocks 2 and 5 as well as the internal portions of blocks 6 and 9. The open space-parks are required to be publically accessible through the provision of a perpetual public access easements. Units and uses adjacent to the park are required to provide active uses and entry ways from the park frontage to the greatest extent feasible.



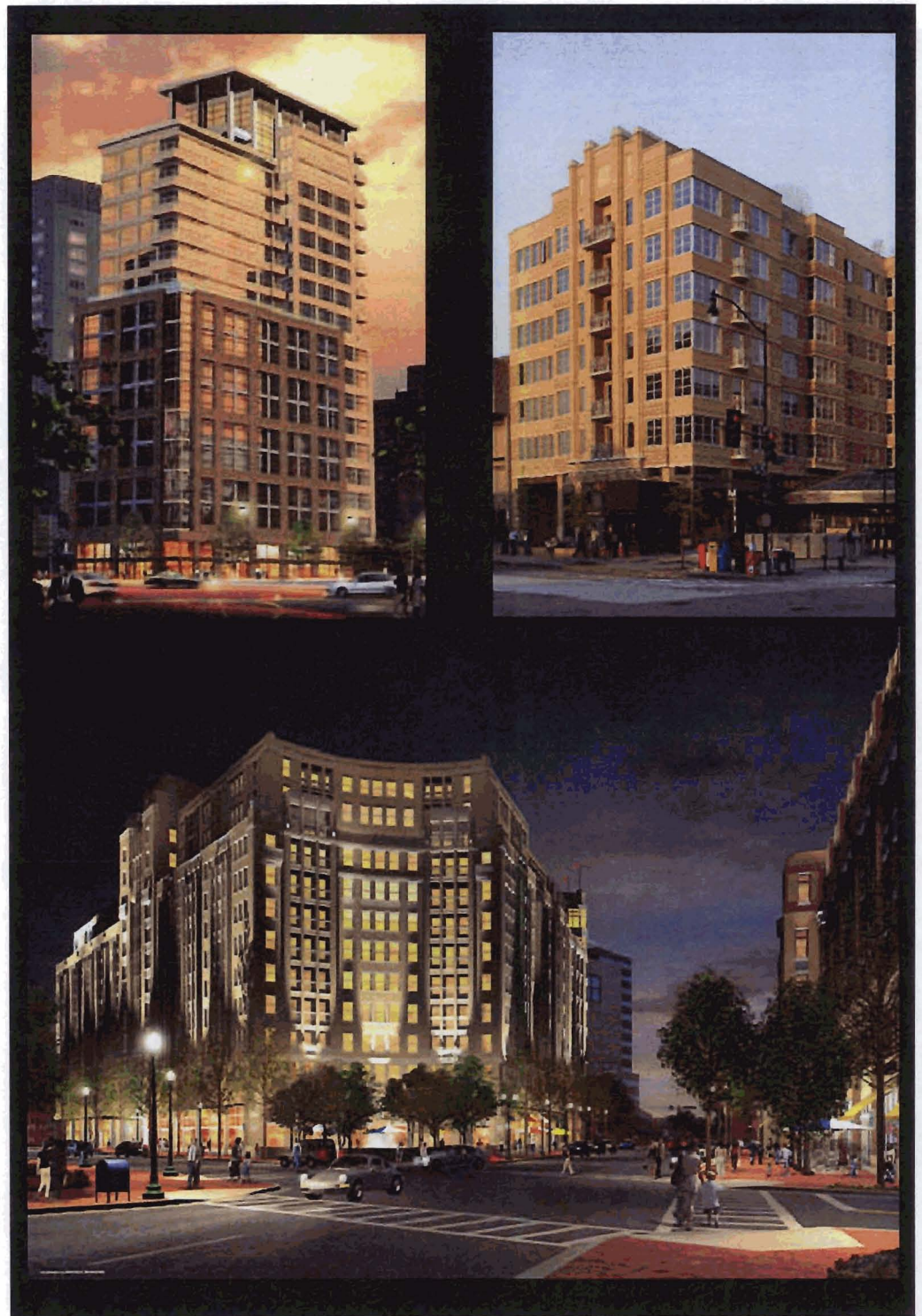
The Buildings

The neighborhood is intended to be a primarily residential neighborhood, ranging from townhouse scale elements at the street to larger multi-family buildings. The building types for this neighborhood will consist of predominately medium and large multi-family buildings. The tallest building within the neighborhood is 250 feet which is permitted on Block 2 to screen the electrical substation and provide a visual terminus for Main Line Boulevard. The tallest buildings are located within the central portion of the site to enable the adjoining buildings to “step-down” in height to Route 1 and the George Washington Memorial Parkway.

Because of the height of Block 2, 3, 4 and 5, the skyline of these buildings will be important, and it is essential that these blocks comply with the building top-skyline requirements (Section 6, pg 56).

Block 3 is required to be angled (See overall Concept Plan) to create a gateway building form and open space on Route 1. It is anticipated that redevelopment on the western side of Route 1 could provide a similar gateway treatment as part of the redevelopment of the properties.

Parking and service are required to be from internal alleys and in no case is parking, loading, and/or service uses permitted to front onto the Four Mile Run park-open space frontage (see the *Four Mile Run Design Guidelines*) for applicable requirements adjacent to Four Mile Run.



Market District Neighborhood

The Neighborhood

Acting as a primary local and regional retail shopping destination within North Potomac Yard, the neighborhood will include a mixture of shops, offices, restaurants and possible civic uses and a central open space.

The retail core will have the most mixed-use of all of the neighborhoods, offering a range of housing choices to residents in addition to office and the local and regional retail uses.

The Street and Block Plan

The street and block plan will be orthogonal. The extension of Reed Street to Potomac Avenue is required and will be a full signalized intersection on Route 1 and Potomac Avenue. New Street B and New Street C are signalized intersections and their designation as a "C" streets will enable these streets to function as a primary road for access to the significant amount of retail within the neighborhood. New Street C and New Street B form the outside perimeter of the neighborhood. New Street D—an important visual and physical corridor between the two parks, is located on the eastern portion of the neighborhood.

Figure 4. Market District Neighborhood



The retail "heart" of the community



Neighborhood Parks

The neighborhood is located around a centrally sited park. The central park—open space—has been configured in a way that will enable the adjoining streets within the central block to perhaps be periodically closed for events such as a farmers' market, antique car shows, etc. The street framework and central open space need to be designed to accommodate civic uses and concerts for the neighborhood to create an exciting retail and cultural destination within North Potomac Yard.

Buildings

The tallest buildings are located within the central portion of this neighborhood to denote the symbolic center of this neighborhood. Buildings on Route 1 are generally 50-60 ft. ft with taller (90 ft.) gateway buildings on East Reed to provide visually prominent building forms at the entrance to the primary retail street. Building heights step down to the west and the George Washington Memorial Parkway to the east.



Metro Square Neighborhood

The Neighborhood

This neighborhood will be located adjacent to the metrorail station, one of only two infill stations to be constructed since the creation of the metrorail system. A defining element of the neighborhood is the approximately one acre open space plaza surrounded by streets and buildings on each of the four sides.

Because of the proximity to the planned metrorail station, this neighborhood is one with higher density, that includes generally continuous building frontages. The uses planned for the neighborhood are predominantly office, although it is essential that a mix of residential uses and ground floor retail be provided within the neighborhood. While a higher percentage of office use is required within the neighborhood, retail and entertainment uses are also required to ensure ground-level activity and add night time activity to balance the office use. The entertainment uses will capitalize on office parking that will not be as heavily used during evening hours.

In addition to the metrorail station, dedicated transit (bus and/or street car) will serve the neighborhood with stops focused around the future metrorail station which will function as a transit center for Potomac Yard, the adjoining neighborhoods and the City.

Figure 5. Metro Square Neighborhood



The office and entertainment district



The Street and Block Plan

The street and block plan will primarily be orthogonal, except in the location of the metro station and the metro square park. Potomac Avenue is curved, which aids in reinforcing the curvilinear nature of the park frontage. Evans Lane and New Street D are angled to frame the park. Evans Lane is an important pedestrian pathway to the metrorail station from the adjoining Del-Ray and Lynhaven neighborhoods. The median in Potomac Avenue is eliminated to minimize the pedestrian crossing to the metrorail station.

The Neighborhood Park

The buildings surrounding the square park are required to be configured in footprint to reinforce the square shape of the park. The Metro Square Park is intended to be an urban park with a combination of active and passive uses. A portion of the park is intended to be a water-stormwater detention and serve as a visual extension of New Street D to connect the Crescent and Metro Square Parks.

The Buildings

Because of the existing FAA height restrictions, the majority of the blocks within this neighborhood will be similar heights ranging from approximately 90 to 110ft., resulting in a neighborhood that will be characterized by Washingtonian scale buildings. Many neighborhoods within great cities are comprised of neighborhoods with generally consistent heights framing beautiful streets. While four of the blocks will have similar heights, the remaining thirteen blocks within North Potomac Yard are required to have varied heights.

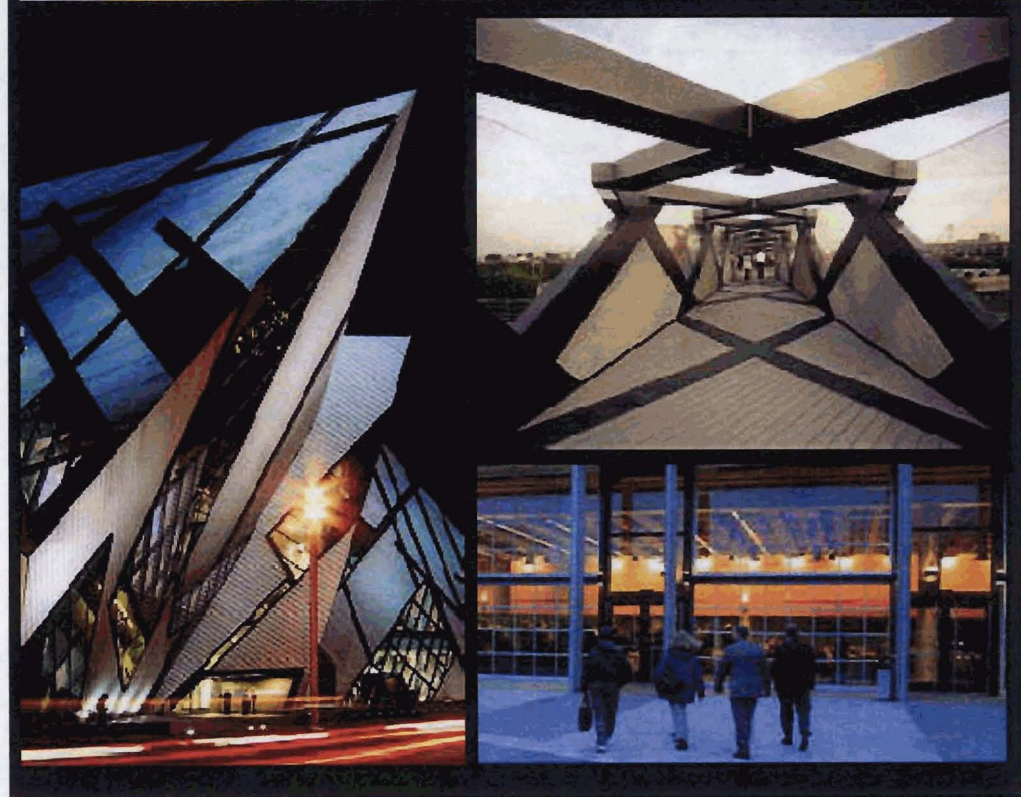
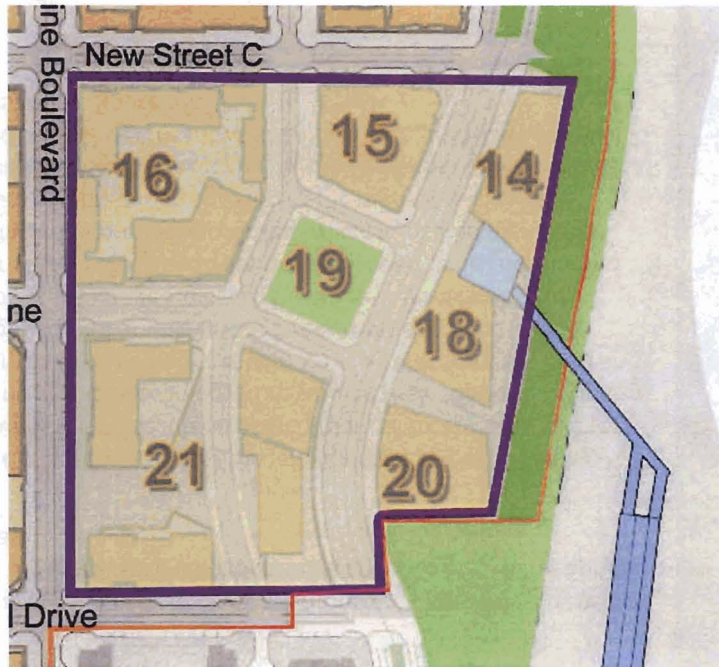
Because of the similar heights within the neighborhoods, it is essential that the curved forms of blocks adjacent to the metrorail station be expressed. The curved building forms are required to ensure that the area adjacent to the metrorail station is a distinctive and memorable portion of the neighborhood and on Potomac Avenue. The horizontal building forms also present an opportunity to incorporate the transportation future and railroad history through the expression of the buildings.



Metrorail Station

The area, block, streets, and open space surrounding the Metrorail station are subject to the flexible zone as defined in the North Potomac Yard Small Area Plan and the accompanying CDD—Coordinated Development District Zoning. While flexibility is permitted surrounding the Metrorail station, this area will be one of the most important civic areas within Potomac Yard. Therefore, it is critical that the building forms be memorable, the civic spaces be urban and high quality, and the area around the Metrorail station function as an urban, pedestrian-oriented transit hub for the City.

Figure 6. Flexible Zone

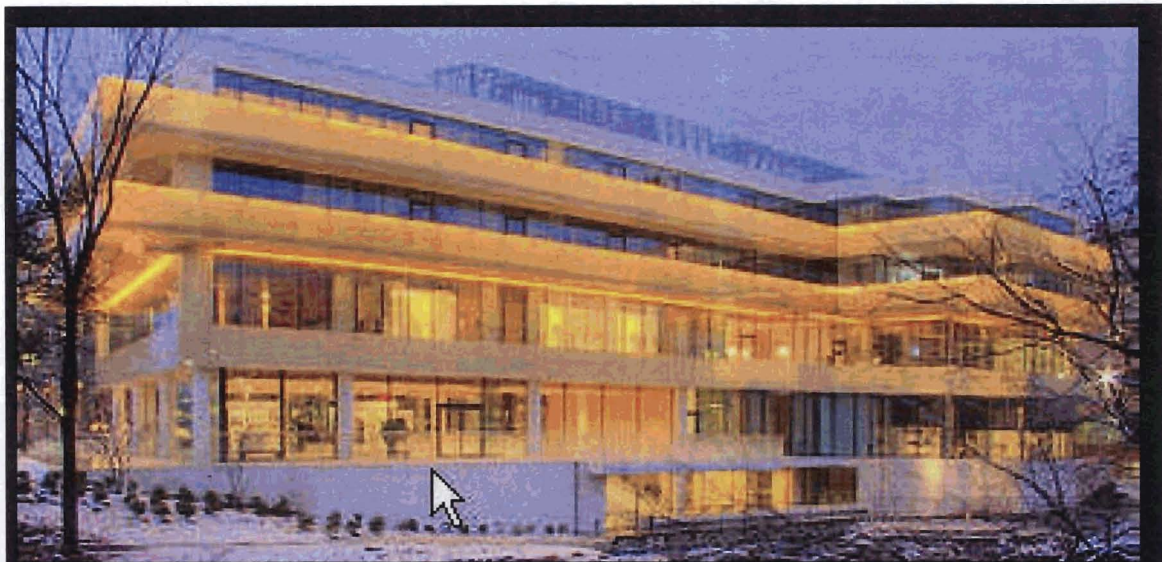


Route 1 Frontage

Not a separate neighborhood, the Route 1 frontage is a visually prominent frontage for the City and the region and will serve as the "front door" for North Potomac Yard. As a gateway entrance for the city, the image of Route 1 will be improved with the streetscape and building requirements. Buildings and uses are required to provide a variety of uses on Route 1, including the provisions of front doors, transitways and retail uses.

Moderate heights on Route 1 are proposed to provide a transition from the city to the established neighborhoods of Lynhaven, Hume Springs and Del Ray.

Route 1 is designated as an "A" Street within the street hierarchy, which requires the highest level of architectural treatments for the facades, and prohibits buildings from turning their "backs" on Route 1. Buildings will be setback a minimum of 25 feet from the curb on Route 1, providing a double row of street trees and a 10 ft. wide sidewalk on the frontage similar to the Route 1 frontage on the remainder of the Yard. The street trees will need to be coordinated with the existing underground 230 KV line which is located along the entire Route 1 frontage. In addition to the highest quality of architectural facades, and entry ways, the buildings on Route 1 will be required to provide significant window openings, transparency and active uses for the Route 1 facades.



An office and entertainment district with ground floor retail centered on the metro station and transit.



3 Plan Framework

"If you plan cities for cars and traffic, you get cars and traffic. If you plan for people and places, you get people and places." - Fred Kent

The plan framework uses streets and open space as the primary organizing elements for North Potomac Yard. The street network, along with the extensive public realm, the hierarchy of views, the massing of structures, and the building typology are all focused on establishing inviting, accessible, varied and interesting open spaces and public realm. This street and open space framework will be the basis on which each of the neighborhoods is constructed.

Similar to other Alexandria neighborhoods such as Carlyle, Del-Ray and Old Town, the street grid will be established which will serve as a unifying element for the neighborhood and buildings are constructed within the street grid. This will also be the case for North Potomac Yard.

3.1 As part of the approval of the *North Potomac Yard Small Area Plan*, CDD Concept Plan and the Design Standards and Guidelines, the streets within Landbay-F are required to be constructed in the locations depicted in the approved CDD Concept Plan dated _____ prepared by _____ and in the dimensions configured in the required cross-sections outlined below.

Figure 7. Framework Streets and Block Plan



A. Framework Streets – Street Hierarchy

A hierarchy of streets is required to maintain a high-quality street environment and address a variety of needs – from the most prominent pedestrian and vehicle streets, to streets which provide parking and service access and functions. The streets vary in width depending on their function and scale of the adjoining buildings.

“A” streets are the most prominent, and create an “address” for the important buildings in each neighborhood. “B” streets connect “A” streets to each other and to service streets, and provide pedestrian and vehicular circulation for each of the neighborhoods. “C” streets provide a means of access and service entries to alleys as well as tertiary streets for the neighborhoods. “C” streets are the least public in nature of all of the streets and, therefore, the least restrictive in design. The “C” streets allow the “A” and “B” street frontages to function as more public primary streets. Internal alleys are required for each block to enable the loading, servicing and other vehicular functions to be located away from the pedestrian realm.

Standards

3.2 On “A” Streets

Curb cuts, entrances to parking garages and service bays are prohibited. “A” streets are subject to the highest design standards:

- Buildings shall front the street.
- Active uses shall be located on all street frontages for all levels.
- The highest quality of architectural façade and streetscape treatment shall be used.

3.3 On “B” Streets

- Buildings shall front the street.
- Active uses shall be located on all street frontages for all levels
- A maximum of one curb cut per block shall be permitted on each side of the street. This curb cut shall be for the central alley, and only if the curb cut cannot be located on a “C” Street.
- Main building and pedestrian entrances shall be located along B street frontages unless adjacent to a “A” street.
- A high quality of architectural façade treatment is required.

3.4 On “C” Streets

- Curb cuts for internal alleys and service should be located on these streets, unless infeasible.
- All access to service and garages shall be from an internal alley within each of the blocks.
- The internal alleys shall be designed and constructed in a manner to ensure that they will provide shared access for adjacent properties and buildings within the block.

- #### 3.5
- Locate and screen utility boxes, meters, and surface transformer switching pads within the central alleys to minimize their visual impact. Coordinate their location with the respective utility company early in the site plan review process.

Figure 8. Street Hierarchy Plan



B. Permitted – Required Block Sizes

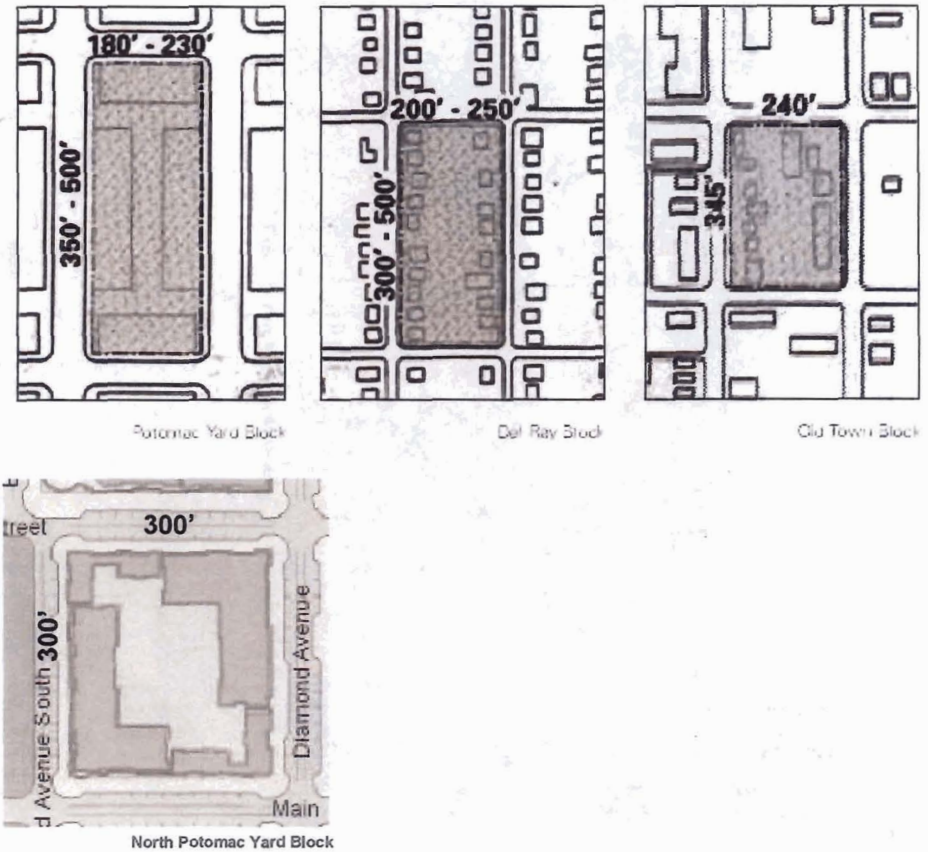
One of the measures to ensure that Landbay-F will develop as an urban, pedestrian-oriented series of neighborhoods is to require urban, human scaled block sizes for each of the neighborhoods. Through the placement of the required framework streets, the block sizes are generally 300 feet by 300 feet or roughly the size of blocks within the surrounding communities of Old Town, Lynhaven and Del Ray, which are used as national planning models due to their block size and associated walkability. For comparison purposes, the block sizes within the adjoining Crystal City development are approximately 600 x 600ft, which creates unurban megablocks within the development.

It is likely that the plan area will take 20 to 30 years to fully implement the vision of the Plan. Over this period, it will often be more expeditious or cheaper to create larger “mega blocks” to accommodate development or different uses throughout the redevelopment of the site. However, similar to Old Town, Del Ray and Carlyle, the North Potomac Yard Plan and this document require that development occurs within the established street grid. While the North Potomac Yard Small Area Plan acknowledges the need for some flexibility, block sizes and the framework street location is not an area where flexibility should be permitted.

Standards

- 3.6 The CDD Concept Plan requires block sizes to be approximately 300 x 300ft. (See Figure 2) as generally depicted in Framework Streets and Block Plan

Figure 9. Block Comparisons



C. General Land Use Plan

The land use plan requires certain uses for certain blocks, although the majority of blocks are intended to be flexible and permit office and/or residential uses. See Figure 7 for the required ground floor retail uses.

Standards

- 3.7 Residential Use is required for Blocks 2, 5, and 6
- 3.8 Hotel use is required for Block 3
- 3.9 Office use is required for Blocks 14, 15, 16, 18, 20, and 21
- 3.10 Blocks 7, 8, 9, 10, 11, 12, 17, 22, and 23 are permitted to be office and/or residential. The final use will be determined as part of the development review process for each block.

Figure 10. General Land Use Plan



D. Required and Preferred Retail Locations

Required retail is concentrated on Reed Avenue, Main Line Boulevard, and the streets connecting to the metrorail station and Landbay G. North Potomac Yard is envisioned as a retail entertainment core, with destination retail. The Market Neighborhood is the primary concentration of retail, with Reed Avenue serving as a central spine for the retail.

Standards

- 3.11 Retail areas are required to provide a minimum of 20 feet clear interior heights and a minimum depth of 50 feet, with up to 80 ft of retail depth which may be required as part of the development review process.
- 3.12 A minimum of 75% glazing is required for retail storefronts along the streetwall. (Also see requirements for retail storefronts Chapter ____)
- 3.13 Retail shall provide a minimum 40 foot storefront extension around the corner from a street—open space where retail is required to be provided.
- 3.14 For Preferred Retail locations, the retail is strongly encouraged. However, if the applicant can demonstrate that the retail is not feasible as part of a development special use permit process, uses other than retail may be permitted. However, the height and depth of the ground floor spaces (regardless of use) shall be designed in a manner that will not preclude future retail and comply with all applicable requirements of the retail requirements herein.
- 3.15 Ground floor retail uses may be provided in locations other than the Required or Preferred Locations, however, the retail must be deducted from the permitted square footage on the block as part of a development special use permit process.

See Chapter ____ for Retail Storefronts and Chapter ____ for Retail Signage guidelines.

Figure 11. Preferred Retail



E. Large Format Retail Uses

Within the North Potomac Yard it is envisioned that several large format retail tenants (footprint exceeding 20,000 s.f.) could be located within the Metro Square and/or Market neighborhoods. The requirements below identify the required configuration for larger retail tenants.

Standards

Two Level Stores

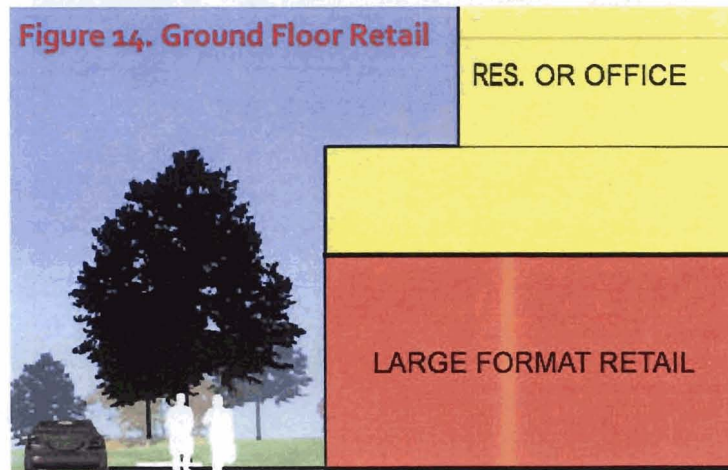
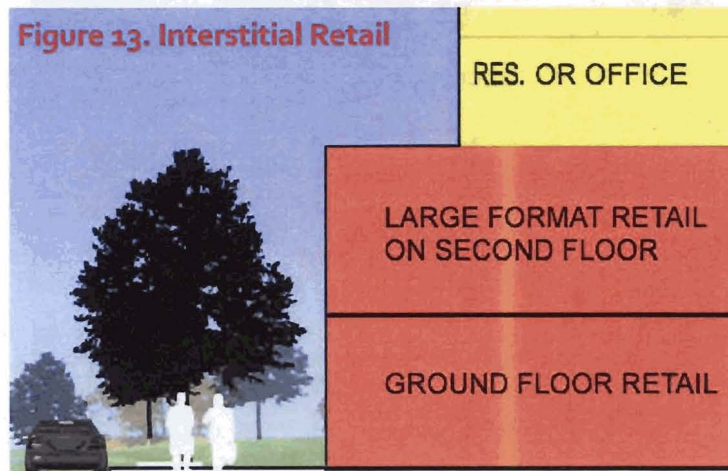
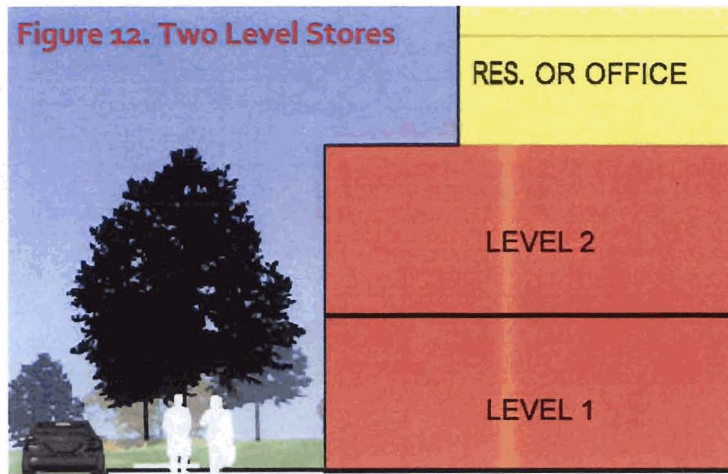
- 3.16 Larger format retailers are encouraged to be multiple (two or three) levels rather than a single level to better integrate within the urban street grid and neighborhoods. If located on two levels, the larger format retail use is required to provide active uses and windows for a minimum of 50 % of the second level street frontage. The remainder of the façade shall not be a blank façade and shall include elements such as display windows, murals and glazing. The first floor is required to comply with the applicable ground floor retail standards. (See Figure 8)

Second Level—Interstitial Retail

- 3.17 To the extent that larger format retailers cannot be located on multiple levels, the tenants shall explore the possibility of locating the retail on a second interstitial level above smaller retail uses on the ground floor, with an entry on the primary street frontage (based on street hierarchy). The second level of interstitial retail is required to provide active uses and windows for a minimum of 70 % for each street frontage. The remainder of the façade shall not be a blank façade and shall include elements such as display windows, murals and glazing. (See Figure 9)

Single Level At-Grade - Ground Floor

- 3.18 The least desirable of the options is that the larger format retailers be provided on a single level at grade. This approach is only permitted if the Director of Planning and Zoning determines that this is the only feasible and practical alternative as part of a development special use permit process. The at-grade-ground floor uses for each street frontage will be required to provide active uses and windows and doors for a minimum of 90 % of the street frontage. The remainder of the façade shall not be a blank façade and shall include elements such as display windows, murals and glazing. (See Figure 10)



F. Height

Figures 15 and 16 depict the permitted maximum and minimum height within each block. Also see Building Form for other applicable height provisions and requirements for each block.

Figure 15. Maximum Building Heights (Feet)



Figure 16. Minimum Building Heights (Feet)

★ Design Standards and Guidelines will establish the minimum heights.



G. Gateway Elements and Signature Facades

Intent

Similar to Old Town, the east-west streets generally terminate visually towards the Potomac River and the Linear Park (except within the Metro Square Neighborhood) providing water and open space views for many of the streets and neighborhoods. The Gateway locations and vistas are defined by their strategic location and relationship to adjoining public streets and open space. Special elements such as towers, gateway elements or unique architectural expressions are required at these locations. These features draw attention to specific points of interest and mark the location of “entries” and “places” for each of the neighborhoods and for the important corridors. In addition, architectural significant facades that are visually and physically prominent “faces” and “edges” of the plan and require the highest level of design excellence and materials. The façade features shall feature the innovative use of materials and design.

Standards

- 3.19 Signature facades require the highest level of design, excellent materials, and the innovative use of materials.
- 3.20 The locations with required gateway element(s) shall provide distinctive three-dimensional forms, unique shapes and materials to reinforce the significance of each location. The gateway element shall be proportioned to the size and scale of the building.

Guidelines

- 3.21 Blocks and buildings should also explore the use of secondary gateways which are elements that define an “edge” or create a pass-through for pedestrians. Secondary Gateways should have qualities that make them distinct from other streetscape pieces and from other gateways i.e. larger, taller, specialty lighting, change of materials.

Figure 17. Gateways, Facades, and Vistas



H. Development Summary

This chart reflects the development parameters for each of the blocks. While the table depicts the maximum square footage and/or dwelling units (du's) for each block, the final permitted square footage and/or dwelling units for each block will be subject to compliance with the applicable design standards for each block as part of the development review process for each building and/or block.

Figure 18. Development Summary Table

Block #	Principal Land Use	Office SF	Residential SF (DU)	Office or Residential SF (DU)	Retail (SF)	Hotel (SF)	Total ³
1	Open Space						
(Crescent Park)							
2	Residential	0	500,000 (500)	0	0	0	500,000
3	Hotel	0	0	0	0	170,000	170,000
4 ¹	Community Facility/ Public Building	0	0	0	0	0	0
5	Residential	0	600,000 (600)	0	0	0	600,000
6	Office / Residential	110,000	0	250,000 (250 DU)	35,000	0	395,000
Crescent Gateway Neighborhood		110,000	1,100,000 (1,100)	250,000 (250 DU)	35,000	170,000	1,665,000
7	Office / Residential	0	0	320,000 (320 DU)	90,000	0	410,000
8	Office / Residential	0	0	690,000 (690 DU)	110,000	0	800,000
9	Office / Residential	55,000	0	260,000 (260 DU)	40,000	0	355,000
10	Office / Residential	0	0	330,000 (330 DU)	100,000	0	490,000
11	Office / Residential	0	0	700,000 (700 DU)	120,000	0	820,000
12	Office and/or Residential	55,000	0	295,000 (295 DU)	50,000	0	400,000
13	Open Space						
(Market Greens)							
Market District Neighborhood TOTAL		110,000	0	2,595,000 (2595 DU)	570,000	0	3,275,000
Metro Flex Zone (Blocks 14, 15, 16, 18, 20 & 21) ²							
	Office	1,100,000	0	300,000 (300 DU)	190,000	0	1,590,000
17	Office / Residential	60,000	0	250,000 (250 DU)	50,000	0	360,000
19	Open Space						
(Market Square Park)							
22	Office	370,000	0	0	65,000	0	435,000
23	Office	180,000	0	0	20,000	0	200,000
Metro Square Neighborhood TOTAL		1,710,000	0	550,000 (550 DU)	325,000	0	2,585,000
24	Open Space						
(Landbay K extension - Potomac Yard Park)							
Totals		1,930,000	1,100,000	3,395,000	930,000	170,000	Total (SF) 7,525,000

NOTES.

- Community facilities, public buildings and accessory uses may be provided on any block and are not deducted from the maximum permitted development, however the uses will be subject to the height requirements, design guidelines and other applicable elements as part of the development review process. Block 4 is reserved as a possible school site.
- The blocks located within the Metro Flex Zone are defined herein and the final block configuration and number of blocks will be determined as part of the rezoning and development review process.
- The maximum amount of development shall be 7,525,000 sf; however the amount of permitted development within each block is conceptual. The final amount of development may be permitted to be transferred from block to block and will be determined as part of the rezoning for the subject property and development special use permit.
- In addition to the maximum amount of development, a minimum amount of density is required for each block pursuant to the minimum heights and other applicable requirements.
- Section 7-700 of the zoning ordinance is not applicable to North Potomac Yard (Landbay F).

**STAFF REPORT
CONTINUED IN NEXT LINK**