

# Retail

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## Appendix

TABLE 1. PRIMARY TRADE AREA RESIDENT-GENERATED RETAIL DEMAND - DOWNTOWN VIENNA - 2021

Category	Expenditures Per Household	Total Expenditures	Capture Rate	Total Captured Expenditures	Retail Sales per SF (Low)	Total Demand- Low Productivity (SF)	Retail Sales per SF (High)	Total Demand- High Productivity (SF)	Retail Sales per SF (Blend)	Total Demand- Blended Productivity (SF)
<b>Food At Home</b>	\$8,720	\$57,621,760	60.00%	\$34,573,056	\$398	86,867	\$517	66,872	\$458	75,570
<b>Alcohol At Home</b>	\$721	\$4,764,368	40.00%	\$1,905,747	\$254	7,503	\$310	6,148	\$282	6,758
<b>Personal/Household Care Goods and Services</b>	\$4,668	\$30,846,144	60.00%	\$18,507,686	\$526	35,186	\$791	23,398	\$659	28,106
<b>Pet Food/Services</b>	\$568	\$3,753,344	60.00%	\$2,252,006	\$162	13,901	\$273	8,249	\$218	10,354
<b>Apparel Services</b>	\$317	\$2,094,736	90.00%	\$1,885,262	\$183	10,302	\$265	7,114	\$224	8,416
<b>NG&amp;S SUBTOTAL</b>	<b>\$14,994</b>	<b>\$99,080,352</b>		<b>\$59,123,758</b>		<b>153,759</b>		<b>111,781</b>		<b>129,204</b>
<b>Full-Service</b>	\$3,916	\$25,876,928	40.00%	\$10,350,771	\$396	26,138	\$562	18,418	\$479	21,609
<b>Fast Food</b>	\$2,762	\$18,251,296	80.00%	\$14,601,037	\$331	44,112	\$394	37,058	\$363	40,279
<b>Alcohol Away from Home</b>	\$583	\$3,852,464	20.00%	\$770,493	\$458	1,682	\$654	1,178	\$556	1,386
<b>Snacks and Non Alcoholic Beverages</b>	\$497	\$3,284,176	40.00%	\$1,313,670	\$245	5,362	\$370	3,550	\$308	4,272
<b>F&amp;B SUBTOTAL</b>	<b>\$7,758</b>	<b>\$51,264,864</b>		<b>\$27,035,971</b>		<b>77,294</b>		<b>60,205</b>		<b>67,546</b>
<b>Home Furnishings</b>	\$4,784	\$31,612,672	10.00%	\$3,161,267	\$310	10,198	\$325	9,727	\$318	9,957
<b>Apparel</b>	\$4,096	\$27,066,368	10.00%	\$2,706,637	\$375	7,218	\$420	6,444	\$398	6,809
<b>Toys, Electronics, Sports and Music Equipment</b>	\$1,622	\$10,718,176	10.00%	\$1,071,818	\$430	2,493	\$462	2,320	\$446	2,403
<b>Reading/Education</b>	\$592	\$3,911,936	10.00%	\$391,194	\$300	1,304	\$360	1,087	\$330	1,185
<b>Pet Supplies</b>	\$345	\$2,279,760	40.00%	\$911,904	\$162	5,629	\$273	3,340	\$218	4,193
<b>Automotive Equipment</b>	\$807	\$5,332,656	40.00%	\$2,133,062	\$188	11,346	\$241	8,851	\$215	9,944
<b>GAFO SUBTOTAL</b>	<b>\$12,246</b>	<b>\$80,921,568</b>		<b>\$10,375,882</b>		<b>38,187</b>		<b>31,769</b>		<b>34,492</b>
<b>PTA RESIDENT-GENERATED RETAIL DEMAND:</b>	<b>\$34,998</b>	<b>\$231,266,784</b>		<b>\$96,535,611</b>		<b>269,240</b>		<b>203,755</b>		<b>231,241</b>

Source: U.S. Census Bureau, Claritas, Inc., Streetsense

TABLE 2. SECONDARY TRADE AREA RESIDENT-GENERATED RETAIL DEMAND - DOWNTOWN VIENNA - 2021

Category	Expenditures Per Household	Total Expenditures	Capture Rate	Total Captured Expenditures	Retail Sales per SF (Low)	Total Demand- Low Productivity (SF)	Retail Sales per SF (High)	Total Demand- High Productivity (SF)	Retail Sales per SF (Blend)	Total Demand- Blended Productivity (SF)
<b>Food At Home</b>	\$8,442	\$135,460,332	30.00%	\$40,638,100	\$398	102,106	\$517	78,604	\$458	\$88,826
<b>Alcohol At Home</b>	\$700	\$11,232,200	20.00%	\$2,246,440	\$254	8,844	\$310	7,247	\$282	\$7,966
<b>Personal/Household Care Goods and Services</b>	\$4,502	\$72,239,092	30.00%	\$21,671,728	\$526	41,201	\$791	27,398	\$659	\$32,911
<b>Pet Food/Services</b>	\$550	\$8,825,300	30.00%	\$2,647,590	\$162	16,343	\$273	9,698	\$218	\$12,173
<b>Apparel Services</b>	\$305	\$4,894,030	40.00%	\$1,957,612	\$183	10,697	\$265	7,387	\$224	\$8,739
<b>NG&amp;S SUBTOTAL</b>	<b>\$14,499</b>	<b>\$232,650,954</b>		<b>\$69,161,469</b>		<b>179,192</b>		<b>130,333</b>		<b>\$150,615</b>
<b>Full-Service</b>	\$3,810	\$61,135,260	20.00%	\$12,227,052	\$396	30,876	\$562	21,756	\$479	\$25,526
<b>Fast Food</b>	\$2,699	\$43,308,154	40.00%	\$17,323,262	\$331	52,336	\$394	43,968	\$363	\$47,788
<b>Alcohol Away from Home</b>	\$576	\$9,242,496	10.00%	\$924,250	\$458	2,018	\$654	1,413	\$556	\$1,662
<b>Snacks and Non Alcoholic Beverages</b>	\$487	\$7,814,402	20.00%	\$1,562,880	\$245	6,379	\$370	4,224	\$308	\$5,083
<b>F&amp;B SUBTOTAL</b>	<b>\$7,572</b>	<b>\$121,500,312</b>		<b>\$32,037,444</b>		<b>91,610</b>		<b>71,361</b>		<b>\$80,059</b>
<b>Home Furnishings</b>	\$4,643	\$74,501,578	5.00%	\$3,725,079	\$310	12,016	\$325	11,462	\$318	\$11,733
<b>Apparel</b>	\$3,955	\$63,461,930	5.00%	\$3,173,097	\$375	8,462	\$420	7,555	\$398	\$7,983
<b>Toys, Electronics, Sports and Music Equipment</b>	\$1,568	\$25,160,128	5.00%	\$1,258,006	\$430	2,926	\$462	2,723	\$446	\$2,821
<b>Reading/Education</b>	\$584	\$9,370,864	5.00%	\$468,543	\$300	1,562	\$360	1,302	\$330	\$1,420
<b>Pet Supplies</b>	\$336	\$5,391,456	20.00%	\$1,078,291	\$162	6,656	\$273	3,950	\$218	\$4,958
<b>Automotive Equipment</b>	\$781	\$12,531,926	20.00%	\$2,506,385	\$188	13,332	\$241	10,400	\$215	\$11,685
<b>GAFO SUBTOTAL</b>	<b>\$11,867</b>	<b>\$190,417,882</b>		<b>\$12,209,401</b>		<b>44,953</b>		<b>37,391</b>		<b>\$40,598</b>
<b>STA RESIDENT-GENERATED RETAIL DEMAND:</b>	<b>\$33,938</b>	<b>\$544,569,148</b>		<b>\$113,408,314</b>		<b>315,754</b>		<b>239,086</b>		<b>271,273</b>

Source: U.S. Census Bureau, Claritas, Inc., Streetsense

**TABLE 3. SUMMARY RESIDENT-GENERATED RETAIL DEMAND - DOWNTOWN VIENNA - 2021**

Category	Expenditures Per Household	Total Expenditures	Capture Rate	Total Captured Expenditures	Retail Sales per SF (Low)	Total Demand- Low Productivity (SF)	Retail Sales per SF (High)	Total Demand- High Productivity (SF)	Retail Sales per SF (Blend)	Total Demand- Blended Productivity (SF)
<b>Food At Home</b>				\$75,211,156	\$398	188,973	\$517	145,476	\$458	164,396
<b>Alcohol At Home</b>				\$4,152,187	\$254	16,347	\$310	13,394	\$282	14,724
<b>Personal/Household Care Goods and Services</b>				\$40,179,414	\$526	76,387	\$791	50,796	\$659	61,017
<b>Pet Food/Services</b>				\$4,899,596	\$162	30,244	\$273	17,947	\$218	22,527
<b>Apparel Services</b>				\$3,842,874	\$183	20,999	\$265	14,501	\$224	17,156
<b>NG&amp;S SUBTOTAL</b>				<b>\$128,285,228</b>		<b>332,950</b>		<b>242,115</b>		<b>279,819</b>
<b>Full-Service</b>				\$22,577,823	\$396	57,015	\$562	40,174	\$479	47,135
<b>Fast Food</b>				\$31,924,298	\$331	96,448	\$394	81,026	\$363	88,067
<b>Alcohol Away from Home</b>				\$1,694,742	\$458	3,700	\$654	2,591	\$556	3,048
<b>Snacks and Non Alcoholic Beverages</b>				\$2,876,551	\$245	11,741	\$370	7,774	\$308	9,355
<b>F&amp;B SUBTOTAL</b>				<b>\$59,073,415</b>		<b>168,904</b>		<b>131,566</b>		<b>147,605</b>
<b>Home Furnishings</b>				\$6,886,346	\$310	22,214	\$325	21,189	\$318	21,689
<b>Apparel</b>				\$5,879,733	\$375	15,679	\$420	13,999	\$398	14,792
<b>Toys, Electronics, Sports and Music Equipment</b>				\$2,329,824	\$430	5,418	\$462	5,043	\$446	5,224
<b>Reading/Education</b>				\$859,737	\$300	2,866	\$360	2,388	\$330	2,605
<b>Pet Supplies</b>				\$1,990,195	\$162	12,285	\$273	7,290	\$218	9,150
<b>Automotive Equipment</b>				\$4,639,448	\$188	24,678	\$241	19,251	\$215	21,629
<b>GAFO SUBTOTAL</b>				<b>\$22,585,283</b>		<b>83,140</b>		<b>69,160</b>		<b>75,090</b>
<b>SUMMARY RESIDENT-GENERATED RETAIL DEMAND:</b>				<b>\$209,943,925</b>		<b>584,995</b>		<b>442,841</b>		<b>502,514</b>

Source: U.S. Census Bureau, Claritas, Inc., Streetsense

**TABLE 4. EMPLOYEE-GENERATED RETAIL DEMAND - DOWNTOWN VIENNA - 2021**

Category	Expenditures Per Household	Total Expenditures	Capture Rate	Total Captured Expenditures	Retail Sales per SF (Low)	Total Demand- Low Productivity (SF)	Retail Sales per SF (High)	Total Demand- High Productivity (SF)	Retail Sales per SF (Blend)	Total Demand- Blended Productivity (SF)
Neighborhood Goods & Services	\$2,011	\$17,666,635	20.00%	\$3,533,327	\$305	11,600	\$431	8,194	\$368	9,604
Food & Alcohol Away From Home	\$1,336	\$11,736,760	75.00%	\$8,802,570	\$358	24,623	\$495	17,783	\$426	20,651
General Merchandise, Apparel, Furnishings, & Other	\$1,703	\$14,960,855	0.00%	\$0	\$294	-	\$347	-	\$321	-
<b>EMPLOYEE-GENERATED RETAIL DEMAND:</b>				<b>\$12,335,897</b>		<b>36,222</b>		<b>25,977</b>		<b>30,255</b>

Source: U.S. Census Bureau, Claritas, Inc., Streetsense

**TABLE 5. COMMUTER-GENERATED RETAIL DEMAND - DOWNTOWN VIENNA - 2021**

Category	Expenditures Per Household	Total Expenditures	Capture Rate	Total Captured Expenditures	Retail Sales per SF (Low)	Total Demand- Low Productivity (SF)	Retail Sales per SF (High)	Total Demand- High Productivity (SF)	Retail Sales per SF (Blend)	Total Demand- Blended Productivity (SF)
Neighborhood Goods & Services	\$2,011	\$470,574,000	1.00%	\$4,705,740	\$305	15,449	\$431	10,913	\$368	12,791
Food & Alcohol Away From Home	\$1,336	\$312,624,000	3.00%	\$9,378,720	\$358	26,234	\$495	18,947	\$426	22,003
General Merchandise, Apparel, Furnishings, & Other	\$1,703	\$398,502,000	0.00%	\$0	\$294	-	\$347	-	\$321	-
<b>COMMUTER-GENERATED RETAIL DEMAND:</b>				<b>\$14,084,460</b>		<b>41,683</b>		<b>29,860</b>		<b>34,794</b>

Source: U.S. Census Bureau, Claritas, Inc., Streetsense

**TABLE 6. AUDIENCE-GENERATED RETAIL DEMAND - DOWNTOWN VIENNA - 2021**

Category	Expenditures Per Household	Total Expenditures	Capture Rate	Total Captured Expenditures	Retail Sales per SF (Low)	Total Demand- Low Productivity (SF)	Retail Sales per SF (High)	Total Demand- High Productivity (SF)	Retail Sales per SF (Blend)	Total Demand- Blended Productivity (SF)
Neighborhood Goods & Services	\$1	\$396,000	15.00%	\$59,400	\$305	195	\$431	138	\$368	161
Food & Alcohol Away From Home	\$17	\$6,624,000	25.00%	\$1,656,000	\$358	4,632	\$495	3,345	\$426	3,885
General Merchandise, Apparel, Furnishings, & Other	\$2	\$608,000	0.00%	\$0	\$294	-	\$347	-	\$321	-
<b>AUDIENCE-GENERATED RETAIL DEMAND:</b>				<b>\$1,715,400</b>		<b>4,827</b>		<b>3,483</b>		<b>4,047</b>

**TABLE 7. W&OD TRAIL USER-GENERATED RETAIL DEMAND - DOWNTOWN VIENNA - 2021**

Category	Expenditures Per Household	Total Expenditures	Capture Rate	Total Captured Expenditures	Retail Sales per SF (Low)	Total Demand- Low Productivity (SF)	Retail Sales per SF (High)	Total Demand- High Productivity (SF)	Retail Sales per SF (Blend)	Total Demand- Blended Productivity (SF)
Neighborhood Goods & Services	\$1	\$84,412	50.00%	\$42,206	\$305	139	\$431	98	\$368	115
Food & Alcohol Away From Home	\$6	\$577,414	75.00%	\$433,061	\$358	1,211	\$495	875	\$426	1,016
General Merchandise, Apparel, Furnishings, & Other	\$0	\$10,776	0.00%	\$0	\$294	-	\$347	-	\$321	-
<b>W&amp;OD TRAIL USER-GENERATED RETAIL DEMAND:</b>				<b>\$475,267</b>		<b>1,350</b>		<b>973</b>		<b>1,131</b>

Source: U.S. Census Bureau, Claritas, Inc., Streetsense

TABLE 8. CUMULATIVE RETAIL DEMAND - DOWNTOWN VIENNA - 2021

Category	Expenditures Per Household	Total Expenditures	Capture Rate	Total Captured Expenditures	Retail Sales per SF (Low)	Total Demand- Low Productivity (SF)	Retail Sales per SF (High)	Total Demand- High Productivity (SF)	Retail Sales per SF (Blend)	Total Demand- Blended Productivity (SF)
Neighborhood Goods & Services				\$136,625,901		360,333		261,458		302,490
Food & Alcohol Away From Home				\$79,343,765		225,604		172,516		195,160
General Merchandise, Apparel, Furnishings, & Other				\$22,585,283		83,140		69,160		75,090
<b>CUMULATIVE RETAIL DEMAND:</b>				<b>\$238,554,949</b>		<b>669,077</b>		<b>503,134</b>		<b>572,740</b>

Source: U.S. Census Bureau, Claritas, Inc., Streetsense

**TABLE 9. PRIMARY TRADE AREA RESIDENT-GENERATED RETAIL DEMAND - DOWNTOWN VIENNA - 2026**

Category	Expenditures Per Household	Total Expenditures	Capture Rate	Total Captured Expenditures	Retail Sales per SF (Low)	Total Demand- Low Productivity (SF)	Retail Sales per SF (High)	Total Demand- High Productivity (SF)	Retail Sales per SF (Blend)	Total Demand- Blended Productivity (SF)
<b>Food At Home</b>	\$8,720	\$58,883,677	60.00%	\$35,330,206	\$398	88,769	\$517	68,337	\$458	77,224
<b>Alcohol At Home</b>	\$721	\$4,868,708	40.00%	\$1,947,483	\$254	7,667	\$310	6,282	\$282	6,906
<b>Personal/Household Care Goods and Services</b>	\$4,668	\$31,521,675	60.00%	\$18,913,005	\$526	35,956	\$791	23,910	\$659	28,721
<b>Pet Food/Services</b>	\$568	\$3,835,542	60.00%	\$2,301,325	\$162	14,206	\$273	8,430	\$218	10,581
<b>Apparel Services</b>	\$317	\$2,140,611	90.00%	\$1,926,550	\$183	10,528	\$265	7,270	\$224	8,601
<b>NG&amp;S SUBTOTAL</b>	<b>\$14,994</b>	<b>\$101,250,212</b>		<b>\$60,418,569</b>		<b>157,126</b>		<b>114,229</b>		<b>132,033</b>
<b>Full-Service</b>	\$3,916	\$26,443,633	40.00%	\$10,577,453	\$396	26,711	\$562	18,821	\$479	22,082
<b>Fast Food</b>	\$2,762	\$18,650,999	80.00%	\$14,920,800	\$331	45,078	\$394	37,870	\$363	41,161
<b>Alcohol Away from Home</b>	\$583	\$3,936,833	20.00%	\$787,367	\$458	1,719	\$654	1,204	\$556	1,416
<b>Snacks and Non Alcoholic Beverages</b>	\$497	\$3,356,099	40.00%	\$1,342,440	\$245	5,479	\$370	3,628	\$308	4,366
<b>F&amp;B SUBTOTAL</b>	<b>\$7,758</b>	<b>\$52,387,565</b>		<b>\$27,628,059</b>		<b>78,987</b>		<b>61,523</b>		<b>69,025</b>
<b>Home Furnishings</b>	\$4,784	\$32,304,990	10.00%	\$3,230,499	\$310	10,421	\$325	9,940	\$318	10,175
<b>Apparel</b>	\$4,096	\$27,659,121	10.00%	\$2,765,912	\$375	7,376	\$420	6,586	\$398	6,958
<b>Toys, Electronics, Sports and Music Equipment</b>	\$1,622	\$10,952,904	10.00%	\$1,095,290	\$430	2,547	\$462	2,371	\$446	2,456
<b>Reading/Education</b>	\$592	\$3,997,607	10.00%	\$399,761	\$300	1,333	\$360	1,110	\$330	1,211
<b>Pet Supplies</b>	\$345	\$2,329,687	40.00%	\$931,875	\$162	5,752	\$273	3,413	\$218	4,284
<b>Automotive Equipment</b>	\$807	\$5,449,441	40.00%	\$2,179,776	\$188	11,595	\$241	9,045	\$215	10,162
<b>GAFO SUBTOTAL</b>	<b>\$12,246</b>	<b>\$82,693,750</b>		<b>\$10,603,113</b>		<b>39,023</b>		<b>32,465</b>		<b>35,247</b>
<b>PTA RESIDENT-GENERATED RETAIL DEMAND:</b>	<b>\$34,998</b>	<b>\$236,331,527</b>		<b>\$98,649,741</b>		<b>275,137</b>		<b>208,217</b>		<b>236,305</b>

Source: U.S. Census Bureau, Claritas, Inc., Streetsense



TABLE 10. SECONDARY TRADE AREA RESIDENT-GENERATED RETAIL DEMAND - DOWNTOWN VIENNA - 2026

Category	Expenditures Per Household	Total Expenditures	Capture Rate	Total Captured Expenditures	Retail Sales per SF (Low)	Total Demand- Low Productivity (SF)	Retail Sales per SF (High)	Total Demand- High Productivity (SF)	Retail Sales per SF (Blend)	Total Demand- Blended Productivity (SF)
<b>Food At Home</b>	\$8,442	\$139,822,155	30.00%	\$41,946,646	\$398	105,394	\$517	81,135	\$458	91,687
<b>Alcohol At Home</b>	\$700	\$11,593,877	20.00%	\$2,318,775	\$254	9,129	\$310	7,480	\$282	8,223
<b>Personal/Household Care Goods and Services</b>	\$4,502	\$74,565,191	30.00%	\$22,369,557	\$526	42,528	\$791	28,280	\$659	33,970
<b>Pet Food/Services</b>	\$550	\$9,109,475	30.00%	\$2,732,842	\$162	16,869	\$273	10,010	\$218	12,565
<b>Apparel Services</b>	\$305	\$5,051,618	40.00%	\$2,020,647	\$183	11,042	\$265	7,625	\$224	9,021
<b>NG&amp;S SUBTOTAL</b>	<b>\$14,499</b>	<b>\$240,142,315</b>		<b>\$71,388,469</b>		<b>184,961</b>		<b>134,530</b>		<b>155,465</b>
<b>Full-Service</b>	\$3,810	\$63,103,815	20.00%	\$12,620,763	\$396	31,871	\$562	22,457	\$479	26,348
<b>Fast Food</b>	\$2,699	\$44,702,677	40.00%	\$17,881,071	\$331	54,021	\$394	45,383	\$363	49,327
<b>Alcohol Away from Home</b>	\$576	\$9,540,104	10.00%	\$954,010	\$458	2,083	\$654	1,459	\$556	1,716
<b>Snacks and Non Alcoholic Beverages</b>	\$487	\$8,066,026	20.00%	\$1,613,205	\$245	6,585	\$370	4,360	\$308	5,246
<b>F&amp;B SUBTOTAL</b>	<b>\$7,572</b>	<b>\$125,412,622</b>		<b>\$33,069,049</b>		<b>94,559</b>		<b>73,659</b>		<b>82,637</b>
<b>Home Furnishings</b>	\$4,643	\$76,900,529	5.00%	\$3,845,026	\$310	12,403	\$325	11,831	\$318	12,110
<b>Apparel</b>	\$3,955	\$65,505,404	5.00%	\$3,275,270	\$375	8,734	\$420	7,798	\$398	8,240
<b>Toys, Electronics, Sports and Music Equipment</b>	\$1,568	\$25,970,284	5.00%	\$1,298,514	\$430	3,020	\$462	2,811	\$446	2,911
<b>Reading/Education</b>	\$584	\$9,672,606	5.00%	\$483,630	\$300	1,612	\$360	1,343	\$330	1,466
<b>Pet Supplies</b>	\$336	\$5,565,061	20.00%	\$1,113,012	\$162	6,870	\$273	4,077	\$218	5,117
<b>Automotive Equipment</b>	\$781	\$12,935,454	20.00%	\$2,587,091	\$188	13,761	\$241	10,735	\$215	12,061
<b>GAFO SUBTOTAL</b>	<b>\$11,867</b>	<b>\$196,549,338</b>		<b>\$12,602,544</b>		<b>46,401</b>		<b>38,595</b>		<b>41,905</b>
<b>STA RESIDENT-GENERATED RETAIL DEMAND:</b>	<b>\$33,938</b>	<b>\$562,104,275</b>		<b>\$117,060,062</b>		<b>325,922</b>		<b>246,784</b>		<b>280,008</b>

Source: U.S. Census Bureau, Claritas, Inc., Streetsense

**TABLE 11. SUMMARY RESIDENT-GENERATED RETAIL DEMAND - DOWNTOWN VIENNA - 2026**

Category	Expenditures Per Household	Total Expenditures	Capture Rate	Total Captured Expenditures	Retail Sales per SF (Low)	Total Demand- Low Productivity (SF)	Retail Sales per SF (High)	Total Demand- High Productivity (SF)	Retail Sales per SF (Blend)	Total Demand- Blended Productivity (SF)
<b>Food At Home</b>				\$77,276,852	\$398	194,163	\$517	149,472	\$458	168,911
<b>Alcohol At Home</b>				\$4,266,258	\$254	16,796	\$310	13,762	\$282	15,129
<b>Personal/Household Care Goods and Services</b>				\$41,282,562	\$526	78,484	\$791	52,190	\$659	62,692
<b>Pet Food/Services</b>				\$5,034,168	\$162	31,075	\$273	18,440	\$218	23,146
<b>Apparel Services</b>				\$3,947,197	\$183	21,569	\$265	14,895	\$224	17,621
<b>NG&amp;S SUBTOTAL</b>				<b>\$131,807,037</b>		<b>342,088</b>		<b>248,759</b>		<b>287,499</b>
<b>Full-Service</b>				\$23,198,216	\$396	58,581	\$562	41,278	\$479	48,431
<b>Fast Food</b>				\$32,801,870	\$331	99,099	\$394	83,253	\$363	90,488
<b>Alcohol Away from Home</b>				\$1,741,377	\$458	3,802	\$654	2,663	\$556	3,132
<b>Snacks and Non Alcoholic Beverages</b>				\$2,955,645	\$245	12,064	\$370	7,988	\$308	9,612
<b>F&amp;B SUBTOTAL</b>				<b>\$60,697,108</b>		<b>173,547</b>		<b>135,182</b>		<b>151,662</b>
<b>Home Furnishings</b>				\$7,075,525	\$310	22,824	\$325	21,771	\$318	22,285
<b>Apparel</b>				\$6,041,182	\$375	16,110	\$420	14,384	\$398	15,198
<b>Toys, Electronics, Sports and Music Equipment</b>				\$2,393,805	\$430	5,567	\$462	5,181	\$446	5,367
<b>Reading/Education</b>				\$883,391	\$300	2,945	\$360	2,454	\$330	2,677
<b>Pet Supplies</b>				\$2,044,887	\$162	12,623	\$273	7,490	\$218	9,402
<b>Automotive Equipment</b>				\$4,766,867	\$188	25,356	\$241	19,780	\$215	22,223
<b>GAFO SUBTOTAL</b>				<b>\$23,205,658</b>		<b>85,424</b>		<b>71,060</b>		<b>77,152</b>
<b>SUMMARY RESIDENT-GENERATED RETAIL DEMAND:</b>				<b>\$215,709,803</b>		<b>601,058</b>		<b>455,002</b>		<b>516,313</b>

Source: U.S. Census Bureau, Claritas, Inc., Streetsense

TABLE 12. EMPLOYEE-GENERATED RETAIL DEMAND - DOWNTOWN VIENNA - 2026

Category	Expenditures Per Household	Total Expenditures	Capture Rate	Total Captured Expenditures	Retail Sales per SF (Low)	Total Demand- Low Productivity (SF)	Retail Sales per SF (High)	Total Demand- High Productivity (SF)	Retail Sales per SF (Blend)	Total Demand- Blended Productivity (SF)
Neighborhood Goods & Services	\$2,011	\$17,868,918	20.00%	\$3,573,784	\$305	11,733	\$431	8,288	\$368	9,714
Food & Alcohol Away From Home	\$1,336	\$11,871,146	75.00%	\$8,903,359	\$358	24,905	\$495	17,987	\$426	20,888
General Merchandise, Apparel, Furnishings, & Other	\$1,703	\$15,132,157	0.00%	\$0	\$294	-	\$347	-	\$321	-
<b>EMPLOYEE-GENERATED RETAIL DEMAND:</b>				<b>\$12,477,143</b>		<b>36,637</b>		<b>26,275</b>		<b>30,602</b>

Source: U.S. Census Bureau, Claritas, Inc., Streetsense

TABLE 13. COMMUTER-GENERATED RETAIL DEMAND - DOWNTOWN VIENNA - 2026

Category	Expenditures Per Household	Total Expenditures	Capture Rate	Total Captured Expenditures	Retail Sales per SF (Low)	Total Demand- Low Productivity (SF)	Retail Sales per SF (High)	Total Demand- High Productivity (SF)	Retail Sales per SF (Blend)	Total Demand- Blended Productivity (SF)
Neighborhood Goods & Services	\$2,011	\$470,574,000	1.00%	\$4,705,740	\$305	15,449	\$431	10,913	\$368	12,791
Food & Alcohol Away From Home	\$1,336	\$312,624,000	3.00%	\$9,378,720	\$358	26,234	\$495	18,947	\$426	22,003
General Merchandise, Apparel, Furnishings, & Other	\$1,703	\$398,502,000	0.00%	\$0	\$294	-	\$347	-	\$321	-
<b>COMMUTER-GENERATED RETAIL DEMAND:</b>				<b>\$14,084,460</b>		<b>41,683</b>		<b>29,860</b>		<b>34,794</b>

Source: U.S. Census Bureau, Claritas, Inc., Streetsense

**TABLE 14. AUDIENCE-GENERATED RETAIL DEMAND - DOWNTOWN VIENNA - 2026**

Category	Expenditures Per Household	Total Expenditures	Capture Rate	Total Captured Expenditures	Retail Sales per SF (Low)	Total Demand- Low Productivity (SF)	Retail Sales per SF (High)	Total Demand- High Productivity (SF)	Retail Sales per SF (Blend)	Total Demand- Blended Productivity (SF)
Neighborhood Goods & Services	\$1	\$396,000	15.00%	\$59,400	\$305	195	\$431	138	\$368	161
Food & Alcohol Away From Home	\$17	\$6,624,000	25.00%	\$1,656,000	\$358	4,632	\$495	3,345	\$426	3,885
General Merchandise, Apparel, Furnishings, & Other	\$2	\$608,000	0.00%	\$0	\$294	-	\$347	-	\$321	-
<b>AUDIENCE-GENERATED RETAIL DEMAND:</b>				<b>\$1,715,400</b>		<b>4,827</b>		<b>3,483</b>		<b>4,047</b>

Source: U.S. Census Bureau, Claritas, Inc., Streetsense

**TABLE 15. W&OD TRAIL USER-GENERATED RETAIL DEMAND - DOWNTOWN VIENNA - 2026**

Category	Expenditures Per Household	Total Expenditures	Capture Rate	Total Captured Expenditures	Retail Sales per SF (Low)	Total Demand- Low Productivity (SF)	Retail Sales per SF (High)	Total Demand- High Productivity (SF)	Retail Sales per SF (Blend)	Total Demand- Blended Productivity (SF)
Neighborhood Goods & Services	\$1	\$84,412	50.00%	\$42,206	\$305	139	\$431	98	\$368	115
Food & Alcohol Away From Home	\$6	\$577,414	75.00%	\$433,061	\$358	1,211	\$495	875	\$426	1,016
General Merchandise, Apparel, Furnishings, & Other	\$0	\$10,776	0.00%	\$0	\$294	-	\$347	-	\$321	-
<b>W&amp;OD TRAIL USER-GENERATED RETAIL DEMAND:</b>				<b>\$475,267</b>		<b>1,350</b>		<b>973</b>		<b>1,131</b>

Source: U.S. Census Bureau, Claritas, Inc., Streetsense

TABLE 16. CUMULATIVE RETAIL DEMAND - DOWNTOWN VIENNA - 2026

Category	Expenditures Per Household	Total Expenditures	Capture Rate	Total Captured Expenditures	Retail Sales per SF (Low)	Total Demand- Low Productivity (SF)	Retail Sales per SF (High)	Total Demand- High Productivity (SF)	Retail Sales per SF (Blend)	Total Demand- Blended Productivity (SF)
<b>Neighborhood Goods &amp; Services</b>				<b>\$140,188,167</b>		<b>369,603</b>		<b>268,196</b>		<b>310,280</b>
<b>Food &amp; Alcohol Away From Home</b>				<b>\$81,068,248</b>		<b>230,529</b>		<b>176,336</b>		<b>199,454</b>
<b>General Merchandise, Apparel, Furnishings, &amp; Other</b>				<b>\$23,205,658</b>		<b>85,424</b>		<b>71,060</b>		<b>77,152</b>
<b>CUMULATIVE RETAIL DEMAND:</b>				<b>\$244,462,073</b>		<b>685,556</b>		<b>515,592</b>		<b>586,886</b>

Source: U.S. Census Bureau, Claritas, Inc., Streetsense

**TABLE 17. PRIMARY TRADE AREA RESIDENT-GENERATED RETAIL DEMAND - DOWNTOWN VIENNA - 2031**

Category	Expenditures Per Household	Total Expenditures	Capture Rate	Total Captured Expenditures	Retail Sales per SF (Low)	Total Demand- Low Productivity (SF)	Retail Sales per SF (High)	Total Demand- High Productivity (SF)	Retail Sales per SF (Blend)	Total Demand- Blended Productivity (SF)
<b>Food At Home</b>	\$8,720	\$60,173,229	60.00%	\$36,103,937	\$398	90,713	\$517	69,834	\$458	78,916
<b>Alcohol At Home</b>	\$721	\$4,975,332	40.00%	\$1,990,133	\$254	7,835	\$310	6,420	\$282	7,057
<b>Personal/Household Care Goods and Services</b>	\$4,668	\$32,211,999	60.00%	\$19,327,200	\$526	36,744	\$791	24,434	\$659	29,350
<b>Pet Food/Services</b>	\$568	\$3,919,541	60.00%	\$2,351,724	\$162	14,517	\$273	8,614	\$218	10,813
<b>Apparel Services</b>	\$317	\$2,187,490	90.00%	\$1,968,741	\$183	10,758	\$265	7,429	\$224	8,789
<b>NG&amp;S SUBTOTAL</b>	<b>\$14,994</b>	<b>\$103,467,591</b>		<b>\$61,741,735</b>		<b>160,567</b>		<b>116,731</b>		<b>134,925</b>
<b>Full-Service</b>	\$3,916	\$27,022,748	40.00%	\$10,809,099	\$396	27,296	\$562	19,233	\$479	22,566
<b>Fast Food</b>	\$2,762	\$19,059,456	80.00%	\$15,247,565	\$331	46,065	\$394	38,699	\$363	42,062
<b>Alcohol Away from Home</b>	\$583	\$4,023,050	20.00%	\$804,610	\$458	1,757	\$654	1,230	\$556	1,447
<b>Snacks and Non Alcoholic Beverages</b>	\$497	\$3,429,598	40.00%	\$1,371,839	\$245	5,599	\$370	3,708	\$308	4,461
<b>F&amp;B SUBTOTAL</b>	<b>\$7,758</b>	<b>\$53,534,852</b>		<b>\$28,233,113</b>		<b>80,717</b>		<b>62,871</b>		<b>70,537</b>
<b>Home Furnishings</b>	\$4,784	\$33,012,469	10.00%	\$3,301,247	\$310	10,649	\$325	10,158	\$318	10,398
<b>Apparel</b>	\$4,096	\$28,264,856	10.00%	\$2,826,486	\$375	7,537	\$420	6,730	\$398	7,111
<b>Toys, Electronics, Sports and Music Equipment</b>	\$1,622	\$11,192,773	10.00%	\$1,119,277	\$430	2,603	\$462	2,423	\$446	2,510
<b>Reading/Education</b>	\$592	\$4,085,155	10.00%	\$408,516	\$300	1,362	\$360	1,135	\$330	1,238
<b>Pet Supplies</b>	\$345	\$2,380,707	40.00%	\$952,283	\$162	5,878	\$273	3,488	\$218	4,378
<b>Automotive Equipment</b>	\$807	\$5,568,784	40.00%	\$2,227,514	\$188	11,848	\$241	9,243	\$215	10,385
<b>GAFO SUBTOTAL</b>	<b>\$12,246</b>	<b>\$84,504,743</b>		<b>\$10,835,322</b>		<b>39,878</b>		<b>33,176</b>		<b>36,019</b>
<b>PTA RESIDENT-GENERATED RETAIL DEMAND:</b>	<b>\$34,998</b>	<b>\$241,507,187</b>		<b>\$100,810,170</b>		<b>281,162</b>		<b>212,777</b>		<b>241,480</b>

Source: U.S. Census Bureau, Claritas, Inc., Streetsense

TABLE 18. SECONDARY TRADE AREA RESIDENT-GENERATED RETAIL DEMAND - DOWNTOWN VIENNA - 2031

Category	Expenditures Per Household	Total Expenditures	Capture Rate	Total Captured Expenditures	Retail Sales per SF (Low)	Total Demand- Low Productivity (SF)	Retail Sales per SF (High)	Total Demand- High Productivity (SF)	Retail Sales per SF (Blend)	Total Demand- Blended Productivity (SF)
<b>Food At Home</b>	\$8,442	\$144,324,428	30.00%	\$43,297,328	\$398	108,787	\$517	83,747	\$458	94,639
<b>Alcohol At Home</b>	\$700	\$11,967,200	20.00%	\$2,393,440	\$254	9,423	\$310	7,721	\$282	8,487
<b>Personal/Household Care Goods and Services</b>	\$4,502	\$76,966,190	30.00%	\$23,089,857	\$526	43,897	\$791	29,191	\$659	35,064
<b>Pet Food/Services</b>	\$550	\$9,402,800	30.00%	\$2,820,840	\$162	17,413	\$273	10,333	\$218	12,969
<b>Apparel Services</b>	\$305	\$5,214,280	40.00%	\$2,085,712	\$183	11,397	\$265	7,871	\$224	9,311
<b>NG&amp;S SUBTOTAL</b>	<b>\$14,499</b>	<b>\$247,874,897</b>		<b>\$73,687,177</b>		<b>190,917</b>		<b>138,862</b>		<b>160,471</b>
<b>Full-Service</b>	\$3,810	\$65,135,758	20.00%	\$13,027,152	\$396	32,897	\$562	23,180	\$479	27,197
<b>Fast Food</b>	\$2,699	\$46,142,103	40.00%	\$18,456,841	\$331	55,761	\$394	46,845	\$363	50,915
<b>Alcohol Away from Home</b>	\$576	\$9,847,296	10.00%	\$984,730	\$458	2,150	\$654	1,506	\$556	1,771
<b>Snacks and Non Alcoholic Beverages</b>	\$487	\$8,325,752	20.00%	\$1,665,150	\$245	6,797	\$370	4,500	\$308	5,415
<b>F&amp;B SUBTOTAL</b>	<b>\$7,572</b>	<b>\$129,450,908</b>		<b>\$34,133,873</b>		<b>97,604</b>		<b>76,031</b>		<b>85,298</b>
<b>Home Furnishings</b>	\$4,643	\$79,376,726	5.00%	\$3,968,836	\$310	12,803	\$325	12,212	\$318	12,500
<b>Apparel</b>	\$3,955	\$67,614,678	5.00%	\$3,380,734	\$375	9,015	\$420	8,049	\$398	8,505
<b>Toys, Electronics, Sports and Music Equipment</b>	\$1,568	\$26,806,527	5.00%	\$1,340,326	\$430	3,117	\$462	2,901	\$446	3,005
<b>Reading/Education</b>	\$584	\$9,984,064	5.00%	\$499,203	\$300	1,664	\$360	1,387	\$330	1,513
<b>Pet Supplies</b>	\$336	\$5,744,256	20.00%	\$1,148,851	\$162	7,092	\$273	4,208	\$218	5,282
<b>Automotive Equipment</b>	\$781	\$13,351,976	20.00%	\$2,670,395	\$188	14,204	\$241	11,080	\$215	12,449
<b>GAFO SUBTOTAL</b>	<b>\$11,867</b>	<b>\$202,878,226</b>		<b>\$13,008,346</b>		<b>47,895</b>		<b>39,838</b>		<b>43,255</b>
<b>STA RESIDENT-GENERATED RETAIL DEMAND:</b>	<b>\$33,938</b>	<b>\$580,204,032</b>		<b>\$120,829,396</b>		<b>336,416</b>		<b>254,731</b>		<b>289,024</b>

Source: U.S. Census Bureau, Claritas, Inc., Streetsense

**TABLE 19. SUMMARY RESIDENT-GENERATED RETAIL DEMAND - DOWNTOWN VIENNA - 2031**

Category	Expenditures Per Household	Total Expenditures	Capture Rate	Total Captured Expenditures	Retail Sales per SF (Low)	Total Demand- Low Productivity (SF)	Retail Sales per SF (High)	Total Demand- High Productivity (SF)	Retail Sales per SF (Blend)	Total Demand- Blended Productivity (SF)
<b>Food At Home</b>				\$79,401,266	\$398	199,501	\$517	153,581	\$458	173,555
<b>Alcohol At Home</b>				\$4,383,573	\$254	17,258	\$310	14,141	\$282	15,545
<b>Personal/Household Care Goods and Services</b>				\$42,417,057	\$526	80,641	\$791	53,625	\$659	64,415
<b>Pet Food/Services</b>				\$5,172,564	\$162	31,929	\$273	18,947	\$218	23,782
<b>Apparel Services</b>				\$4,054,453	\$183	22,155	\$265	15,300	\$224	18,100
<b>NG&amp;S SUBTOTAL</b>				<b>\$135,428,913</b>		<b>351,485</b>		<b>255,593</b>		<b>295,396</b>
<b>Full-Service</b>				\$23,836,251	\$396	60,193	\$562	42,413	\$479	49,763
<b>Fast Food</b>				\$33,704,406	\$331	101,826	\$394	85,544	\$363	92,978
<b>Alcohol Away from Home</b>				\$1,789,339	\$458	3,907	\$654	2,736	\$556	3,218
<b>Snacks and Non Alcoholic Beverages</b>				\$3,036,990	\$245	12,396	\$370	8,208	\$308	9,876
<b>F&amp;B SUBTOTAL</b>				<b>\$62,366,986</b>		<b>178,321</b>		<b>138,902</b>		<b>155,835</b>
<b>Home Furnishings</b>				\$7,270,083	\$310	23,452	\$325	22,369	\$318	22,898
<b>Apparel</b>				\$6,207,220	\$375	16,553	\$420	14,779	\$398	15,616
<b>Toys, Electronics, Sports and Music Equipment</b>				\$2,459,604	\$430	5,720	\$462	5,324	\$446	5,515
<b>Reading/Education</b>				\$907,719	\$300	3,026	\$360	2,521	\$330	2,751
<b>Pet Supplies</b>				\$2,101,134	\$162	12,970	\$273	7,696	\$218	9,660
<b>Automotive Equipment</b>				\$4,897,909	\$188	26,053	\$241	20,323	\$215	22,834
<b>GAFO SUBTOTAL</b>				<b>\$23,843,668</b>		<b>87,773</b>		<b>73,014</b>		<b>79,273</b>
<b>SUMMARY RESIDENT-GENERATED RETAIL DEMAND:</b>				<b>\$221,639,566</b>		<b>617,579</b>		<b>467,508</b>		<b>530,504</b>

Source: U.S. Census Bureau, Claritas, Inc., Streetsense



**TABLE 20. EMPLOYEE-GENERATED RETAIL DEMAND - DOWNTOWN VIENNA - 2031**

Category	Expenditures Per Household	Total Expenditures	Capture Rate	Total Captured Expenditures	Retail Sales per SF (Low)	Total Demand- Low Productivity (SF)	Retail Sales per SF (High)	Total Demand- High Productivity (SF)	Retail Sales per SF (Blend)	Total Demand- Blended Productivity (SF)
Neighborhood Goods & Services	\$2,011	\$18,064,583	20.00%	\$3,612,917	\$305	11,861	\$431	8,379	\$368	9,820
Food & Alcohol Away From Home	\$1,336	\$12,001,135	75.00%	\$9,000,851	\$358	25,177	\$495	18,184	\$426	21,116
General Merchandise, Apparel, Furnishings, & Other	\$1,703	\$15,297,854	0.00%	\$0	\$294	-	\$347	-	\$321	-
<b>EMPLOYEE-GENERATED RETAIL DEMAND:</b>				<b>\$12,613,768</b>		<b>37,038</b>		<b>26,562</b>		<b>30,937</b>

Source: U.S. Census Bureau, Claritas, Inc., Streetsense

**TABLE 21. COMMUTER-GENERATED RETAIL DEMAND - DOWNTOWN VIENNA - 2031**

Category	Expenditures Per Household	Total Expenditures	Capture Rate	Total Captured Expenditures	Retail Sales per SF (Low)	Total Demand- Low Productivity (SF)	Retail Sales per SF (High)	Total Demand- High Productivity (SF)	Retail Sales per SF (Blend)	Total Demand- Blended Productivity (SF)
Neighborhood Goods & Services	\$2,011	\$470,574,000	1.00%	\$4,705,740	\$305	15,449	\$431	10,913	\$368	12,791
Food & Alcohol Away From Home	\$1,336	\$312,624,000	3.00%	\$9,378,720	\$358	26,234	\$495	18,947	\$426	22,003
General Merchandise, Apparel, Furnishings, & Other	\$1,703	\$398,502,000	0.00%	\$0	\$294	-	\$347	-	\$321	-
<b>COMMUTER-GENERATED RETAIL DEMAND:</b>				<b>\$14,084,460</b>		<b>41,683</b>		<b>29,860</b>		<b>34,794</b>

Source: U.S. Census Bureau, Claritas, Inc., Streetsense

**TABLE 22. AUDIENCE-GENERATED RETAIL DEMAND - DOWNTOWN VIENNA - 2031**

Category	Expenditures Per Household	Total Expenditures	Capture Rate	Total Captured Expenditures	Retail Sales per SF (Low)	Total Demand- Low Productivity (SF)	Retail Sales per SF (High)	Total Demand- High Productivity (SF)	Retail Sales per SF (Blend)	Total Demand- Blended Productivity (SF)
Neighborhood Goods & Services	\$1	\$396,000	15.00%	\$59,400	\$305	195	\$431	138	\$368	161
Food & Alcohol Away From Home	\$17	\$6,624,000	25.00%	\$1,656,000	\$358	4,632	\$495	3,345	\$426	3,885
General Merchandise, Apparel, Furnishings, & Other	\$2	\$608,000	0.00%	\$0	\$294	-	\$347	-	\$321	-
<b>AUDIENCE-GENERATED RETAIL DEMAND:</b>				<b>\$1,715,400</b>		<b>4,827</b>		<b>3,483</b>		<b>4,047</b>

Source: U.S. Census Bureau, Claritas, Inc., Streetsense

**TABLE 23. W&OD TRAIL USER-GENERATED RETAIL DEMAND - DOWNTOWN VIENNA - 2031**

Category	Expenditures Per Household	Total Expenditures	Capture Rate	Total Captured Expenditures	Retail Sales per SF (Low)	Total Demand- Low Productivity (SF)	Retail Sales per SF (High)	Total Demand- High Productivity (SF)	Retail Sales per SF (Blend)	Total Demand- Blended Productivity (SF)
Neighborhood Goods & Services	\$1	\$84,412	50.00%	\$42,206	\$305	139	\$431	98	\$368	115
Food & Alcohol Away From Home	\$6	\$577,414	75.00%	\$433,061	\$358	1,211	\$495	875	\$426	1,016
General Merchandise, Apparel, Furnishings, & Other	\$0	\$10,776	0.00%	\$0	\$294	-	\$347	-	\$321	-
<b>W&amp;OD TRAIL USER-GENERATED RETAIL DEMAND:</b>				<b>\$475,267</b>		<b>1,350</b>		<b>973</b>		<b>1,131</b>

Source: U.S. Census Bureau, Claritas, Inc., Streetsense

TABLE 24. CUMULATIVE RETAIL DEMAND - DOWNTOWN VIENNA - 2031

Category	Expenditures Per Household	Total Expenditures	Capture Rate	Total Captured Expenditures	Retail Sales per SF (Low)	Total Demand- Low Productivity (SF)	Retail Sales per SF (High)	Total Demand- High Productivity (SF)	Retail Sales per SF (Blend)	Total Demand- Blended Productivity (SF)
Neighborhood Goods & Services				\$143,849,175		379,128		275,120		318,283
Food & Alcohol Away From Home				\$82,835,618		235,576		180,252		203,855
General Merchandise, Apparel, Furnishings, & Other				\$23,843,668		87,773		73,014		79,273
<b>CUMULATIVE RETAIL DEMAND:</b>				<b>\$250,528,461</b>		<b>702,477</b>		<b>528,386</b>		<b>601,412</b>

Source: U.S. Census Bureau, Claritas, Inc., Streetsense

**TABLE 25. PRIMARY TRADE AREA RESIDENT-GENERATED RETAIL DEMAND - CEDAR PARK - 2021**

Category	Expenditures Per Household	Total Expenditures	Capture Rate	Total Captured Expenditures	Retail Sales per SF (Low)	Total Demand- Low Productivity (SF)	Retail Sales per SF (High)	Total Demand- High Productivity (SF)	Retail Sales per SF (Blend)	Total Demand- Blended Productivity (SF)
<b>Food At Home</b>	\$8,529	\$27,599,844	25.00%	\$6,899,961	\$398	17,337	\$517	13,346	\$458	15,082
<b>Alcohol At Home</b>	\$669	\$2,164,884	5.00%	\$108,244	\$254	426	\$310	349	\$282	384
<b>Personal/Household Care Goods and Services</b>	\$4,461	\$14,435,796	10.00%	\$1,443,580	\$526	2,744	\$791	1,825	\$659	2,192
<b>Pet Food/Services</b>	\$535	\$1,731,260	7.00%	\$121,188	\$162	748	\$273	444	\$218	557
<b>Apparel Services</b>	\$305	\$986,980	20.00%	\$197,396	\$183	1,079	\$265	745	\$224	881
<b>NG&amp;S SUBTOTAL</b>	<b>\$14,499</b>	<b>\$46,918,764</b>		<b>\$8,770,369</b>		<b>22,334</b>		<b>16,709</b>		<b>19,096</b>
<b>Full-Service</b>	\$3,697	\$11,963,492	5.00%	\$598,175	\$396	1,511	\$562	1,064	\$479	1,249
<b>Fast Food</b>	\$2,768	\$8,957,248	15.00%	\$1,343,587	\$331	4,059	\$394	3,410	\$363	3,706
<b>Alcohol Away from Home</b>	\$534	\$1,728,024	3.00%	\$51,841	\$458	113	\$654	79	\$556	93
<b>Snacks and Non Alcoholic Beverages</b>	\$482	\$1,559,752	5.00%	\$77,988	\$245	318	\$370	211	\$308	254
<b>F&amp;B SUBTOTAL</b>	<b>\$7,481</b>	<b>\$24,208,516</b>		<b>\$2,071,590</b>		<b>6,001</b>		<b>4,765</b>		<b>5,302</b>
<b>Home Furnishings</b>	\$4,514	\$14,607,304	3.00%	\$438,219	\$310	1,414	\$325	1,348	\$318	1,380
<b>Apparel</b>	\$3,960	\$12,814,560	3.00%	\$384,437	\$375	1,025	\$420	915	\$398	967
<b>Toys, Electronics, Sports and Music Equipment</b>	\$1,556	\$5,035,216	7.00%	\$352,465	\$430	820	\$462	763	\$446	790
<b>Reading/Education</b>	\$568	\$1,838,048	3.00%	\$55,141	\$300	184	\$360	153	\$330	167
<b>Pet Supplies</b>	\$327	\$1,058,172	7.00%	\$74,072	\$162	457	\$273	271	\$218	341
<b>Automotive Equipment</b>	\$780	\$2,524,080	3.00%	\$75,722	\$188	403	\$241	314	\$215	353
<b>GAFO SUBTOTAL</b>	<b>\$11,705</b>	<b>\$37,877,380</b>		<b>\$1,380,057</b>		<b>4,302</b>		<b>3,765</b>		<b>3,998</b>
<b>PTA RESIDENT-GENERATED RETAIL DEMAND:</b>	<b>\$33,685</b>	<b>\$109,004,660</b>		<b>\$12,222,016</b>		<b>32,637</b>		<b>25,239</b>		<b>28,397</b>

Source: U.S. Census Bureau, Claritas, Inc., Streetsense

**TABLE 26. EMPLOYEE-GENERATED RETAIL DEMAND - CEDAR PARK - 2021**

Category	Expenditures Per Household	Total Expenditures	Capture Rate	Total Captured Expenditures	Retail Sales per SF (Low)	Total Demand- Low Productivity (SF)	Retail Sales per SF (High)	Total Demand- High Productivity (SF)	Retail Sales per SF (Blend)	Total Demand- Blended Productivity (SF)
Neighborhood Goods & Services	\$2,011	\$4,026,022	15.00%	\$603,903	\$305	1,983	\$431	1,401	\$368	1,641
Food & Alcohol Away From Home	\$1,336	\$2,674,672	25.00%	\$668,668	\$358	1,870	\$495	1,351	\$426	1,569
General Merchandise, Apparel, Furnishings, & Other	\$1,703	\$3,409,406	0.00%	\$0	\$294	-	\$347	-	\$321	-
<b>EMPLOYEE-GENERATED RETAIL DEMAND:</b>				<b>\$1,272,571</b>		<b>3,853</b>		<b>2,751</b>		<b>3,210</b>

Source: U.S. Census Bureau, Claritas, Inc., Streetsense

**TABLE 27. COMMUTER-GENERATED RETAIL DEMAND - CEDAR PARK - 2021**

Category	Expenditures Per Household	Total Expenditures	Capture Rate	Total Captured Expenditures	Retail Sales per SF (Low)	Total Demand- Low Productivity (SF)	Retail Sales per SF (High)	Total Demand- High Productivity (SF)	Retail Sales per SF (Blend)	Total Demand- Blended Productivity (SF)
Neighborhood Goods & Services	\$2,011	\$203,915,400	1.00%	\$2,039,154	\$305	6,695	\$431	4,729	\$368	5,543
Food & Alcohol Away From Home	\$1,336	\$135,470,400	3.00%	\$4,064,112	\$358	11,368	\$495	8,210	\$426	9,535
General Merchandise, Apparel, Furnishings, & Other	\$1,703	\$172,684,200	0.00%	\$0	\$294	-	\$347	-	\$321	-
<b>COMMUTER-GENERATED RETAIL DEMAND:</b>				<b>\$6,103,266</b>		<b>18,063</b>		<b>12,939</b>		<b>15,077</b>

Source: U.S. Census Bureau, Claritas, Inc., Streetsense

**TABLE 28. CUMULATIVE RETAIL DEMAND - CEDAR PARK - 2021**

Category	Expenditures Per Household	Total Expenditures	Capture Rate	Total Captured Expenditures	Retail Sales per SF (Low)	Total Demand- Low Productivity (SF)	Retail Sales per SF (High)	Total Demand- High Productivity (SF)	Retail Sales per SF (Blend)	Total Demand- Blended Productivity (SF)
<b>Neighborhood Goods &amp; Services</b>				<b>\$11,413,426</b>		<b>31,011</b>		<b>22,839</b>		<b>26,281</b>
<b>Food &amp; Alcohol Away From Home</b>				<b>\$6,804,370</b>		<b>19,240</b>		<b>14,326</b>		<b>16,405</b>
<b>General Merchandise, Apparel, Furnishings, &amp; Other</b>				<b>\$1,380,057</b>		<b>4,302</b>		<b>3,765</b>		<b>3,998</b>
<b>CUMULATIVE RETAIL DEMAND:</b>				<b>\$19,597,853</b>		<b>54,553</b>		<b>40,930</b>		<b>46,684</b>

Source: U.S. Census Bureau, Claritas, Inc., Streetsense

TABLE 29. PRIMARY TRADE AREA RESIDENT-GENERATED RETAIL DEMAND - CEDAR PARK - 2026

Category	Expenditures Per Household	Total Expenditures	Capture Rate	Total Captured Expenditures	Retail Sales per SF (Low)	Total Demand- Low Productivity (SF)	Retail Sales per SF (High)	Total Demand- High Productivity (SF)	Retail Sales per SF (Blend)	Total Demand- Blended Productivity (SF)
<b>Food At Home</b>	\$8,529	\$28,270,520	25.00%	\$7,067,630	\$398	17,758	\$517	13,670	\$458	15,448
<b>Alcohol At Home</b>	\$669	\$2,217,491	5.00%	\$110,875	\$254	437	\$310	358	\$282	393
<b>Personal/Household Care Goods and Services</b>	\$4,461	\$14,786,586	10.00%	\$1,478,659	\$526	2,811	\$791	1,869	\$659	2,245
<b>Pet Food/Services</b>	\$535	\$1,773,330	7.00%	\$124,133	\$162	766	\$273	455	\$218	571
<b>Apparel Services</b>	\$305	\$1,010,964	20.00%	\$202,193	\$183	1,105	\$265	763	\$224	903
<b>NG&amp;S SUBTOTAL</b>	<b>\$14,499</b>	<b>\$48,058,890</b>		<b>\$8,983,489</b>		<b>22,877</b>		<b>17,115</b>		<b>19,560</b>
<b>Full-Service</b>	\$3,697	\$12,254,205	5.00%	\$612,710	\$396	1,547	\$562	1,090	\$479	1,279
<b>Fast Food</b>	\$2,768	\$9,174,909	15.00%	\$1,376,236	\$331	4,158	\$394	3,493	\$363	3,797
<b>Alcohol Away from Home</b>	\$534	\$1,770,015	3.00%	\$53,100	\$458	116	\$654	81	\$556	96
<b>Snacks and Non Alcoholic Beverages</b>	\$482	\$1,597,654	5.00%	\$79,883	\$245	326	\$370	216	\$308	260
<b>F&amp;B SUBTOTAL</b>	<b>\$7,481</b>	<b>\$24,796,783</b>		<b>\$2,121,930</b>		<b>6,147</b>		<b>4,880</b>		<b>5,431</b>
<b>Home Furnishings</b>	\$4,514	\$14,962,261	3.00%	\$448,868	\$310	1,448	\$325	1,381	\$318	1,414
<b>Apparel</b>	\$3,960	\$13,125,954	3.00%	\$393,779	\$375	1,050	\$420	938	\$398	991
<b>Toys, Electronics, Sports and Music Equipment</b>	\$1,556	\$5,157,572	7.00%	\$361,030	\$430	840	\$462	781	\$446	809
<b>Reading/Education</b>	\$568	\$1,882,713	3.00%	\$56,481	\$300	188	\$360	157	\$330	171
<b>Pet Supplies</b>	\$327	\$1,083,886	7.00%	\$75,872	\$162	468	\$273	278	\$218	349
<b>Automotive Equipment</b>	\$780	\$2,585,415	3.00%	\$77,562	\$188	413	\$241	322	\$215	362
<b>GAFO SUBTOTAL</b>	<b>\$11,705</b>	<b>\$38,797,800</b>		<b>\$1,413,592</b>		<b>4,407</b>		<b>3,857</b>		<b>4,095</b>
<b>PTA RESIDENT-GENERATED RETAIL DEMAND:</b>	<b>\$33,685</b>	<b>\$111,653,473</b>		<b>\$12,519,011</b>		<b>33,431</b>		<b>25,852</b>		<b>29,087</b>

Source: U.S. Census Bureau, Claritas, Inc., Streetsense

**TABLE 30. EMPLOYEE-GENERATED RETAIL DEMAND - CEDAR PARK - 2026**

Category	Expenditures Per Household	Total Expenditures	Capture Rate	Total Captured Expenditures	Retail Sales per SF (Low)	Total Demand- Low Productivity (SF)	Retail Sales per SF (High)	Total Demand- High Productivity (SF)	Retail Sales per SF (Blend)	Total Demand- Blended Productivity (SF)
Neighborhood Goods & Services	\$2,011	\$4,081,782	15.00%	\$612,267	\$305	2,010	\$431	1,420	\$368	1,664
Food & Alcohol Away From Home	\$1,336	\$2,711,716	25.00%	\$677,929	\$358	1,896	\$495	1,370	\$426	1,590
General Merchandise, Apparel, Furnishings, & Other	\$1,703	\$3,456,626	0.00%	\$0	\$294	-	\$347	-	\$321	-
<b>EMPLOYEE-GENERATED RETAIL DEMAND:</b>				<b>\$1,290,196</b>		<b>3,906</b>		<b>2,789</b>		<b>3,255</b>

Source: U.S. Census Bureau, Claritas, Inc., Streetsense

**TABLE 31. COMMUTER-GENERATED RETAIL DEMAND - CEDAR PARK - 2026**

Category	Expenditures Per Household	Total Expenditures	Capture Rate	Total Captured Expenditures	Retail Sales per SF (Low)	Total Demand- Low Productivity (SF)	Retail Sales per SF (High)	Total Demand- High Productivity (SF)	Retail Sales per SF (Blend)	Total Demand- Blended Productivity (SF)
Neighborhood Goods & Services	\$2,011	\$203,915,400	1.00%	\$2,039,154	\$305	6,695	\$431	4,729	\$368	5,543
Food & Alcohol Away From Home	\$1,336	\$135,470,400	3.00%	\$4,064,112	\$358	11,368	\$495	8,210	\$426	9,535
General Merchandise, Apparel, Furnishings, & Other	\$1,703	\$172,684,200	0.00%	\$0	\$294	-	\$347	-	\$321	-
<b>COMMUTER-GENERATED RETAIL DEMAND:</b>				<b>\$6,103,266</b>		<b>18,063</b>		<b>12,939</b>		<b>15,077</b>

Source: U.S. Census Bureau, Claritas, Inc., Streetsense



TABLE 32. CUMULATIVE RETAIL DEMAND - CEDAR PARK - 2026

Category	Expenditures Per Household	Total Expenditures	Capture Rate	Total Captured Expenditures	Retail Sales per SF (Low)	Total Demand- Low Productivity (SF)	Retail Sales per SF (High)	Total Demand- High Productivity (SF)	Retail Sales per SF (Blend)	Total Demand- Blended Productivity (SF)
Neighborhood Goods & Services				\$11,634,910		31,581		23,264		26,767
Food & Alcohol Away From Home				\$6,863,971		19,412		14,460		16,556
General Merchandise, Apparel, Furnishings, & Other				\$1,413,592		4,407		3,857		4,095
<b>CUMULATIVE RETAIL DEMAND:</b>				<b>\$19,912,473</b>		<b>55,400</b>		<b>41,581</b>		<b>47,419</b>

Source: U.S. Census Bureau, Claritas, Inc., Streetsense

**TABLE 33. PRIMARY TRADE AREA RESIDENT-GENERATED RETAIL DEMAND - CEDAR PARK - 2031**

Category	Expenditures Per Household	Total Expenditures	Capture Rate	Total Captured Expenditures	Retail Sales per SF (Low)	Total Demand- Low Productivity (SF)	Retail Sales per SF (High)	Total Demand- High Productivity (SF)	Retail Sales per SF (Blend)	Total Demand- Blended Productivity (SF)
<b>Food At Home</b>	\$8,529	\$28,957,494	25.00%	\$7,239,373	\$398	18,189	\$517	14,003	\$458	15,824
<b>Alcohol At Home</b>	\$669	\$2,271,376	5.00%	\$113,569	\$254	447	\$310	366	\$282	403
<b>Personal/Household Care Goods and Services</b>	\$4,461	\$15,145,900	10.00%	\$1,514,590	\$526	2,879	\$791	1,915	\$659	2,300
<b>Pet Food/Services</b>	\$535	\$1,816,422	7.00%	\$127,150	\$162	785	\$273	466	\$218	585
<b>Apparel Services</b>	\$305	\$1,035,530	20.00%	\$207,106	\$183	1,132	\$265	782	\$224	925
<b>NG&amp;S SUBTOTAL</b>	<b>\$14,499</b>	<b>\$49,226,721</b>		<b>\$9,201,788</b>		<b>23,433</b>		<b>17,531</b>		<b>20,036</b>
<b>Full-Service</b>	\$3,697	\$12,551,982	5.00%	\$627,599	\$396	1,585	\$562	1,117	\$479	1,310
<b>Fast Food</b>	\$2,768	\$9,397,859	15.00%	\$1,409,679	\$331	4,259	\$394	3,578	\$363	3,889
<b>Alcohol Away from Home</b>	\$534	\$1,813,026	3.00%	\$54,391	\$458	119	\$654	83	\$556	98
<b>Snacks and Non Alcoholic Beverages</b>	\$482	\$1,636,477	5.00%	\$81,824	\$245	334	\$370	221	\$308	266
<b>F&amp;B SUBTOTAL</b>	<b>\$7,481</b>	<b>\$25,399,345</b>		<b>\$2,173,493</b>		<b>6,296</b>		<b>4,999</b>		<b>5,563</b>
<b>Home Furnishings</b>	\$4,514	\$15,325,844	3.00%	\$459,775	\$310	1,483	\$325	1,415	\$318	1,448
<b>Apparel</b>	\$3,960	\$13,444,914	3.00%	\$403,347	\$375	1,076	\$420	960	\$398	1,015
<b>Toys, Electronics, Sports and Music Equipment</b>	\$1,556	\$5,282,901	7.00%	\$369,803	\$430	860	\$462	800	\$446	829
<b>Reading/Education</b>	\$568	\$1,928,462	3.00%	\$57,854	\$300	193	\$360	161	\$330	175
<b>Pet Supplies</b>	\$327	\$1,110,224	7.00%	\$77,716	\$162	480	\$273	285	\$218	357
<b>Automotive Equipment</b>	\$780	\$2,648,241	3.00%	\$79,447	\$188	423	\$241	330	\$215	370
<b>GAFO SUBTOTAL</b>	<b>\$11,705</b>	<b>\$39,740,587</b>		<b>\$1,447,943</b>		<b>4,514</b>		<b>3,951</b>		<b>4,195</b>
<b>PTA RESIDENT-GENERATED RETAIL DEMAND:</b>	<b>\$33,685</b>	<b>\$114,366,653</b>		<b>\$12,823,223</b>		<b>34,243</b>		<b>26,480</b>		<b>29,794</b>

Source: U.S. Census Bureau, Claritas, Inc., Streetsense

**TABLE 34. EMPLOYEE-GENERATED RETAIL DEMAND - CEDAR PARK - 2031**

Category	Expenditures Per Household	Total Expenditures	Capture Rate	Total Captured Expenditures	Retail Sales per SF (Low)	Total Demand- Low Productivity (SF)	Retail Sales per SF (High)	Total Demand- High Productivity (SF)	Retail Sales per SF (Blend)	Total Demand- Blended Productivity (SF)
Neighborhood Goods & Services	\$2,011	\$4,131,376	15.00%	\$619,706	\$305	2,034	\$431	1,437	\$368	1,684
Food & Alcohol Away From Home	\$1,336	\$2,744,664	25.00%	\$686,166	\$358	1,919	\$495	1,386	\$426	1,610
General Merchandise, Apparel, Furnishings, & Other	\$1,703	\$3,498,624	0.00%	\$0	\$294	-	\$347	-	\$321	-
<b>EMPLOYEE-GENERATED RETAIL DEMAND:</b>				<b>\$1,305,872</b>		<b>3,954</b>		<b>2,823</b>		<b>3,294</b>

Source: U.S. Census Bureau, Claritas, Inc., Streetsense

**TABLE 35. COMMUTER-GENERATED RETAIL DEMAND - CEDAR PARK - 2031**

Category	Expenditures Per Household	Total Expenditures	Capture Rate	Total Captured Expenditures	Retail Sales per SF (Low)	Total Demand- Low Productivity (SF)	Retail Sales per SF (High)	Total Demand- High Productivity (SF)	Retail Sales per SF (Blend)	Total Demand- Blended Productivity (SF)
Neighborhood Goods & Services	\$2,011	\$203,915,400	1.00%	\$2,039,154	\$305	6,695	\$431	4,729	\$368	5,543
Food & Alcohol Away From Home	\$1,336	\$135,470,400	3.00%	\$4,064,112	\$358	11,368	\$495	8,210	\$426	9,535
General Merchandise, Apparel, Furnishings, & Other	\$1,703	\$172,684,200	0.00%	\$0	\$294	-	\$347	-	\$321	-
<b>COMMUTER-GENERATED RETAIL DEMAND:</b>				<b>\$6,103,266</b>		<b>18,063</b>		<b>12,939</b>		<b>15,077</b>

Source: U.S. Census Bureau, Claritas, Inc., Streetsense

**TABLE 36. CUMULATIVE RETAIL DEMAND - CEDAR PARK - 2031**

Category	Expenditures Per Household	Total Expenditures	Capture Rate	Total Captured Expenditures	Retail Sales per SF (Low)	Total Demand- Low Productivity (SF)	Retail Sales per SF (High)	Total Demand- High Productivity (SF)	Retail Sales per SF (Blend)	Total Demand- Blended Productivity (SF)
<b>Neighborhood Goods &amp; Services</b>				<b>\$11,860,648</b>		<b>32,162</b>		<b>23,697</b>		<b>27,263</b>
<b>Food &amp; Alcohol Away From Home</b>				<b>\$6,923,771</b>		<b>19,584</b>		<b>14,595</b>		<b>16,707</b>
<b>General Merchandise, Apparel, Furnishings, &amp; Other</b>				<b>\$1,447,943</b>		<b>4,514</b>		<b>3,951</b>		<b>4,195</b>
<b>CUMULATIVE RETAIL DEMAND:</b>				<b>\$20,232,361</b>		<b>56,259</b>		<b>42,243</b>		<b>48,165</b>

Source: U.S. Census Bureau, Claritas, Inc., Streetsense

# Office + Industrial

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## Appendix

## Exhibit I-1

Local Office and Industrial Inventories  
Vienna, VA  
March 2021

ALL OF VIENNA									<i>Percent Occupied</i>	<i>Percent Occupied by Intended Use</i>
	Office	Industrial	Retail	Gym/Studio	Bank	Other	Vacant	TOTAL		
Office	1,860,298	0	86,480	790	0	1,700	146,268	2,095,536	93.0%	88.8%
Industrial	49,908	186,197	28,770	15,780	0	2,070	37,130	319,855	88.4%	58.2%
Retail	19,840	1,140	0	0	10,380	0	0	31,360		
Bank	0	0	0	0	27,709	0	2,276	29,985		
<b>TOTAL</b>	<b>1,930,046</b>	<b>187,337</b>	<b>115,250</b>	<b>16,570</b>	<b>38,089</b>	<b>3,770</b>	<b>185,674</b>	<b>2,476,736</b>		

CHURCH STREET NODE									<i>Percent Occupied</i>	<i>Percent Occupied by Intended Use</i>
	Office	Industrial	Retail	Gym/Studio	Bank	Other	Vacant	TOTAL		
Office	102,366	0	8,740	790	0	0	0	111,896	100.0%	91.5%
Industrial	0	0	0	0	0	0	0	0	N/A	N/A
Retail	4,410	0	0	0	0	0	0	4,410		
Bank	0	0	0	0	0	0	0	0		
<b>TOTAL</b>	<b>106,776</b>	<b>0</b>	<b>8,740</b>	<b>790</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>116,306</b>		

MAPLE AVENUE NODE									<i>Percent Occupied</i>	<i>Percent Occupied by Intended Use</i>
	Office	Industrial	Retail	Gym/Studio	Bank	Other	Vacant	TOTAL		
Office	508,734	0	73,080	0	0	1,700	45,185	628,699	92.8%	80.9%
Industrial	0	3,549	0	0	0	0	0	3,549	100.0%	100.0%
Retail	7,890	1,140	0	0	10,380	0	0	19,410		
Bank	0	0	0	0	27,709	0	2,276	29,985		
<b>TOTAL</b>	<b>516,624</b>	<b>4,689</b>	<b>73,080</b>	<b>0</b>	<b>38,089</b>	<b>1,700</b>	<b>47,461</b>	<b>681,643</b>		

## Exhibit I-1

Local Office and Industrial Inventories  
Vienna, VA  
March 2021

FOLLIN LANE NODE									<i>Percent Occupied</i>	<i>Percent Occupied by Intended Use</i>
	Office	Industrial	Retail	Gym/Studio	Bank	Other	Vacant			
Office	1,240,998	0	0	0	0	0	97,163	<b>1,338,161</b>	92.7%	92.7%
Industrial	0	0	0	0	0	0	35,000	<b>35,000</b>	0.0%	0.0%
Retail	0	0	0	0	0	0	0	0		
Bank	0	0	0	0	0	0	0	0		
<b>TOTAL</b>	<b>1,240,998</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>132,163</b>	<b>1,373,161</b>		

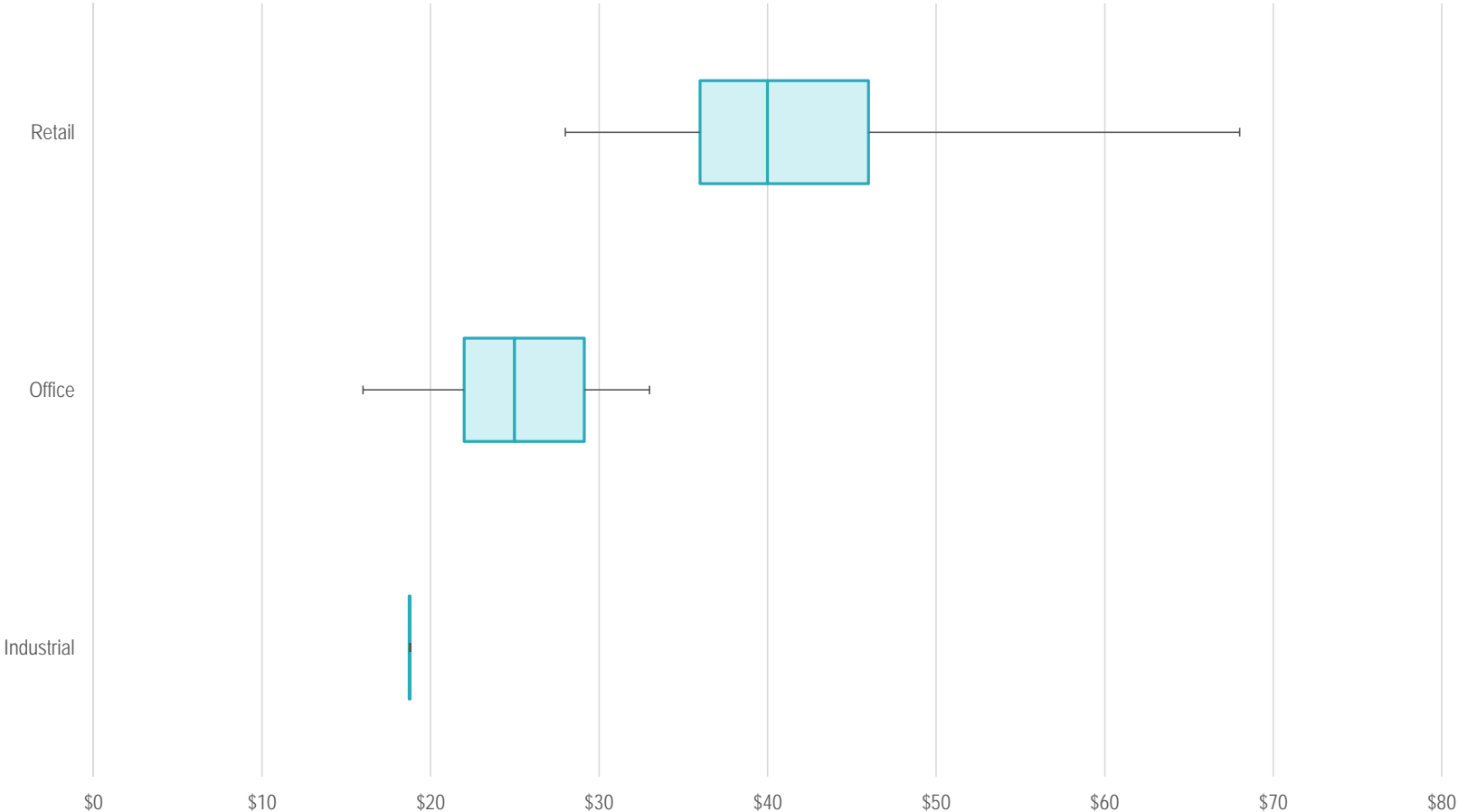
  

MILL/DOMINION STREET NODE									<i>Percent Occupied</i>	<i>Percent Occupied by Intended Use</i>
	Office	Industrial	Retail	Gym/Studio	Bank	Other	Vacant			
Office	8,200	0	4,660	0	0	0	3,920	<b>16,780</b>	76.6%	48.9%
Industrial	49,908	182,648	28,770	15,780	0	2,070	2,130	<b>281,306</b>	99.2%	64.9%
Retail	2,070	0	0	0	0	0	0	2,070		
Bank	0	0	0	0	0	0	0	0		
<b>TOTAL</b>	<b>60,178</b>	<b>182,648</b>	<b>33,430</b>	<b>15,780</b>	<b>0</b>	<b>2,070</b>	<b>6,050</b>	<b>300,156</b>		

*Note: Above table excludes retail spaces occupied by non-office or industrial users*  
*Source: RCLCO*

### Exhibit I-2

Box and Whiskers Plot of Current Retail, Office, and Industrial Rents  
Vienna, VA  
March 2021



Source: CoStar; Loopnet; RCLCO



## Exhibit I-3

### Summary of Employment Base Fairfax County, VA 2017

NAICS CODE	NAICS LABEL	VIENNA			FAIRFAX COUNTY			VIENNA "FAIR SHARE" CAPTURE
		NUMBER OF FIRMS	NUMBER OF EMPLOYEES	EMPLOYMENT DISTRIBUTION	NUMBER OF FIRMS	NUMBER OF EMPLOYEES	EMPLOYMENT DISTRIBUTION	
22	Utilities	N/A	N/A	N/A	15	1,270	0.2%	N/A
51	Information	7	33	0.3%	671	41,661	6.8%	0.0
61	Educational services	24	157	1.3%	552	6,610	1.1%	1.2
72	Accommodation and food services	101	1,467	12.4%	1,814	44,519	7.2%	1.7
311	Food manufacturing	6	64	0.5%	42	460	0.1%	7.2
339	Miscellaneous manufacturing	4	8	0.1%	64	559	0.1%	0.7
424	Merchant wholesalers, nondurable goods	4	20	0.2%	223	2,465	0.4%	0.4
441	Motor vehicle and parts dealers	4	38	0.3%	99	6,152	1.0%	0.3
443	Electronics and appliance stores	4	17	0.1%	64	1,480	0.2%	0.6
444	Building material and garden equipment and supplies dealers	5	46	0.4%	79	3,701	0.6%	0.6
445	Food and beverage stores	19	627	5.3%	273	11,266	1.8%	2.9
446	Health and personal care stores	7	151	1.3%	131	3,307	0.5%	2.4
447	Gasoline stations	5	35	0.3%	167	1,679	0.3%	1.1
448	Clothing and clothing accessories stores	6	28	0.2%	284	8,761	1.4%	0.2
451	Sporting goods, hobby, musical instrument, and book stores	7	86	0.7%	75	2,072	0.3%	2.2
452	General merchandise stores	N/A	N/A	N/A	33	7,905	1.3%	N/A
522	Credit intermediation and related activities	1	4,500	38.0%	260	20,766	3.4%	11.3
523	Securities, commodity contracts, and other financial investments and related activities	16	60	0.5%	317	3,521	0.6%	0.9
524	Insurance carriers and related activities	10	31	0.3%	443	5,674	0.9%	0.3
531	Real estate	33	102	0.9%	1,147	9,526	1.5%	0.6
532	Rental and leasing services	N/A	N/A	N/A	66	1,543	0.3%	N/A
533	Lessors of nonfinancial intangible assets (except copyrighted works)	N/A	N/A	N/A	14	509	0.1%	N/A
561	Administrative and support services	24	405	3.4%	1,473	64,439	10.5%	0.3
562	Waste management and remediation services	N/A	N/A	N/A	43	1,077	0.2%	N/A
711	Performing arts, spectator sports, and related industries	4	43	0.4%	109	3,166	0.5%	0.7
712	Museums, historical sites, and similar institutions	N/A	N/A	N/A	13	694	0.1%	N/A
713	Amusement, gambling, and recreation industries	11	359	3.0%	254	7,261	1.2%	2.6
813	Religious, grantmaking, civic, professional, and similar organizations	10	49	0.4%	484	6,098	1.0%	0.4
4234	Professional and commercial equipment and supplies merchant wholesalers	3	15	0.1%	115	4,291	0.7%	0.2
4421	Furniture stores	4	18	0.2%	35	365	0.1%	2.6
4422	Home furnishings stores	9	21	0.2%	115	1,612	0.3%	0.7
4531	Florists	N/A	N/A	N/A	40	314	0.1%	N/A
4532	Office supplies, stationery, and gift stores	N/A	N/A	N/A	51	845	0.1%	N/A
4533	Used merchandise stores	N/A	N/A	N/A	27	527	0.1%	N/A
4541	Electronic shopping and mail-order houses	4	22	0.2%	121	1,107	0.2%	1.0

## Exhibit I-3

### Summary of Employment Base Fairfax County, VA 2017

NAICS CODE	NAICS LABEL	VIENNA			FAIRFAX COUNTY			VIENNA "FAIR SHARE" CAPTURE
		NUMBER OF FIRMS	NUMBER OF EMPLOYEES	EMPLOYMENT DISTRIBUTION	NUMBER OF FIRMS	NUMBER OF EMPLOYEES	EMPLOYMENT DISTRIBUTION	
4542	Vending machine operators	N/A	N/A	N/A	7	25	0.0%	N/A
4543	Direct selling establishments	N/A	N/A	N/A	65	328	0.1%	N/A
5411	Legal services	19	86	0.7%	628	5,285	0.9%	0.8
5412	Accounting, tax preparation, bookkeeping, and payroll services	15	90	0.8%	550	12,882	2.1%	0.4
5413	Architectural, engineering, and related services	8	58	0.5%	561	22,274	3.6%	0.1
5414	Specialized design services	3	6	0.1%	138	563	0.1%	0.6
5417	Scientific research and development services	N/A	N/A	N/A	144	14,108	2.3%	N/A
5418	Advertising, public relations, and related services	N/A	N/A	N/A	193	1,919	0.3%	N/A
6211	Offices of physicians	31	256	2.2%	769	9,782	1.6%	1.4
6212	Offices of dentists	42	241	2.0%	733	5,192	0.8%	2.4
6241	Individual and family services	3	12	0.1%	132	3,215	0.5%	0.2
6244	Child day care services	8	84	0.7%	279	4,773	0.8%	0.9
8111	Automotive repair and maintenance	10	93	0.8%	341	2,802	0.5%	1.7
8112	Electronic and precision equipment repair and maintenance	N/A	N/A	N/A	44	307	0.0%	N/A
8113	Commercial and industrial machinery and equipment (except automotive and electronic) repair and maintenance	N/A	N/A	N/A	25	119	0.0%	N/A
8114	Personal and household goods repair and maintenance	5	7	0.1%	94	240	0.0%	1.5
8122	Death care services	N/A	N/A	N/A	14	311	0.1%	N/A
8123	Drycleaning and laundry services	10	49	0.4%	182	1,183	0.2%	2.2
45391	Pet and pet supplies stores	5	38	0.3%	24	651	0.1%	3.0
45392	Art dealers	N/A	N/A	N/A	6	22	0.0%	N/A
45399	All other miscellaneous store retailers	4	8	0.1%	57	270	0.0%	1.5
54153	Computer facilities management services	N/A	N/A	N/A	152	8,704	1.4%	N/A
54161	Management consulting services	31	73	0.6%	1,381	28,543	4.6%	0.1
54162	Environmental consulting services	N/A	N/A	N/A	51	1,010	0.2%	N/A
54169	Other scientific and technical consulting services	11	37	0.3%	244	3,026	0.5%	0.6
54191	Marketing research and public opinion polling	N/A	N/A	N/A	36	881	0.1%	N/A
54192	Photographic services	N/A	N/A	N/A	43	242	0.0%	N/A
54193	Translation and interpretation services	N/A	N/A	N/A	42	1,255	0.2%	N/A
54194	Veterinary services	5	87	0.7%	83	1,544	0.3%	2.9
54199	All other professional, scientific, and technical services	N/A	N/A	N/A	193	1,763	0.3%	N/A
62131	Offices of chiropractors	5	21	0.2%	123	487	0.1%	2.2
62132	Offices of optometrists	4	27	0.2%	84	592	0.1%	2.4
62133	Offices of mental health practitioners (except physicians)	7	13	0.1%	94	476	0.1%	1.4
62134	Offices of physical, occupational and speech therapists, and audiologists	6	24	0.2%	97	1,138	0.2%	1.1

## Exhibit I-3

### Summary of Employment Base Fairfax County, VA 2017

NAICS CODE	NAICS LABEL	VIENNA			FAIRFAX COUNTY			VIENNA "FAIR SHARE" CAPTURE
		NUMBER OF FIRMS	NUMBER OF EMPLOYEES	EMPLOYMENT DISTRIBUTION	NUMBER OF FIRMS	NUMBER OF EMPLOYEES	EMPLOYMENT DISTRIBUTION	
81219	Other personal care services	12	58	0.5%	128	615	0.1%	4.9
81291	Pet care (except veterinary) services	4	4	0.0%	83	760	0.1%	0.3
541511	Custom computer programming services	22	284	2.4%	1,561	36,855	6.0%	0.4
541512	Computer systems design services	24	250	2.1%	1,250	55,945	9.1%	0.2
541519	Other computer related services	6	18	0.2%	327	9,464	1.5%	0.1
812111	Barber shops	4	22	0.2%	40	179	0.0%	6.4
812112	Beauty salons	19	120	1.0%	331	2,964	0.5%	2.1
812113	Nail salons	8	30	0.3%	90	496	0.1%	3.1
48-49	Transportation and warehousing	N/A	N/A	N/A	403	7,995	1.3%	N/A
Other 31-33	Other manufacturing	3	54	0.5%	230	5,045	0.8%	0.6
Other 42	Other Wholesale trade	N/A	N/A	N/A	331	6,418	1.0%	N/A
Other 62	Other healthcare and social assistance	N/A	N/A	N/A	454	34,366	5.6%	N/A
Other 8129	Other other personal services	N/A	N/A	N/A	117	848	0.1%	N/A
<b>TOTAL</b>	<b>Subtotal of the Above</b>	<b>666</b>	<b>10,552</b>	<b>89.1%</b>	<b>22,667</b>	<b>575,064</b>	<b>93.3%</b>	
<b>TOTAL</b>	<b>According to Annual Economic Survey</b>	<b>733</b>	<b>11,843</b>		<b>24,631</b>	<b>616,375</b>		

Note: Data for credit intermediation and related activities in Vienna not available via the Economic Census due to smaller sample size; above data reflects estimates for Navy Federal Credit Union.  
Source: 2017 Economic Census; 2012 Economic Census; RCLCO

Exhibit I-4

Capture of County Employment  
Vienna, VA  
2017

INDUSTRY	EMPLOYEES IN VIENNA	CAPTURE OF ALL COUNTY EMPLOYEES	VIENNA "FAIR SHARE" CAPTURE	RECENT GROWTH IN INDUSTRY COUNTYWIDE
<b>Manufacturing</b>				
311 Food manufacturing	64	13.9%	7.2	-
Other 31-33 Other manufacturing	54	1.1%	0.6	N/A
339 Miscellaneous manufacturing	8	1.4%	0.7	=
<b>TOTAL</b>	<b>126</b>	<b>2.1%</b>	<b>1.1</b>	<b>-</b>
<b>Trade (Including Retail), Transportation, &amp; Utilities</b>				
445 Food and beverage stores	627	5.6%	2.9	+
446 Health and personal care stores	151	4.6%	2.4	+
451 Sporting goods, hobby, musical instrument, and book stores	86	4.2%	2.2	-
444 Building material and garden equipment and supplies dealers	46	1.2%	0.6	+
441 Motor vehicle and parts dealers	38	0.6%	0.3	+
45391 Pet and pet supplies stores	38	5.8%	3.0	=
447 Gasoline stations	35	2.1%	1.1	=
448 Clothing and clothing accessories stores	28	0.3%	0.2	=
4541 Electronic shopping and mail-order houses	22	2.0%	1.0	+
4422 Home furnishings stores	21	1.3%	0.7	+
424 Merchant wholesalers, nondurable goods	20	0.8%	0.4	=
4421 Furniture stores	18	4.9%	2.6	-
443 Electronics and appliance stores	17	1.1%	0.6	-
4234 Professional and commercial equipment and supplies merchant wholesalers	15	0.3%	0.2	+
45399 All other miscellaneous store retailers	8	3.0%	1.5	=
<b>TOTAL</b>	<b>1,170</b>	<b>1.6%</b>	<b>0.9</b>	<b>=</b>
<b>Information</b>				
51 Information	33	0.1%	0.0	-
<b>TOTAL</b>	<b>33</b>	<b>0.1%</b>	<b>0.0</b>	<b>-</b>

## Exhibit I-4

### Capture of County Employment Vienna, VA 2017

INDUSTRY	EMPLOYEES IN VIENNA	CAPTURE OF ALL COUNTY EMPLOYEES	VIENNA "FAIR SHARE" CAPTURE	RECENT GROWTH IN INDUSTRY COUNTYWIDE
<b>Financial Activities</b>				
522 Credit intermediation and related activities	4,500	21.7%	11.3	=
531 Real estate	102	1.1%	0.6	=
523 Securities, commodity contracts, and other financial investments and related activities	60	1.7%	0.9	+
524 Insurance carriers and related activities	31	0.5%	0.3	+
<b>TOTAL</b>	<b>4,693</b>	<b>11.3%</b>	<b>6.2</b>	<b>+</b>
<b>Professional &amp; Business Services</b>				
561 Administrative and support services	405	0.6%	0.3	=
541511 Custom computer programming services	284	0.8%	0.4	+
541512 Computer systems design services	250	0.4%	0.2	+
5412 Accounting, tax preparation, bookkeeping, and payroll services	90	0.7%	0.4	+
54194 Veterinary services	87	5.6%	2.9	-
5411 Legal services	86	1.6%	0.8	+
54161 Management consulting services	73	0.3%	0.1	=
5413 Architectural, engineering, and related services	58	0.3%	0.1	-
54169 Other scientific and technical consulting services	37	1.2%	0.6	+
541519 Other computer related services	18	0.2%	0.1	=
5414 Specialized design services	6	1.1%	0.6	-
<b>TOTAL</b>	<b>1,394</b>	<b>0.5%</b>	<b>0.3</b>	<b>+</b>
<b>Educational &amp; Health Services</b>				
6211 Offices of physicians	256	2.6%	1.4	+
6212 Offices of dentists	241	4.6%	2.4	+
61 Educational services	157	2.4%	1.2	+
6244 Child day care services	84	1.8%	0.9	+
62132 Offices of optometrists	27	4.6%	2.4	-
62134 Offices of physical, occupational and speech therapists, and audiologists	24	2.1%	1.1	+
62131 Offices of chiropractors	21	4.3%	2.2	=
62133 Offices of mental health practitioners (except physicians)	13	2.7%	1.4	+
6241 Individual and family services	12	0.4%	0.2	+
<b>TOTAL</b>	<b>835</b>	<b>1.3%</b>	<b>0.7</b>	<b>+</b>

## Exhibit I-4

### Capture of County Employment Vienna, VA 2017

INDUSTRY	EMPLOYEES IN VIENNA	CAPTURE OF ALL COUNTY EMPLOYEES	VIENNA "FAIR SHARE" CAPTURE	RECENT GROWTH IN INDUSTRY COUNTYWIDE
<b>Leisure &amp; Hospitality</b>				
72 Accommodation and food services	1,467	3.3%	1.7	+
713 Amusement, gambling, and recreation industries	359	4.9%	2.6	+
711 Performing arts, spectator sports, and related industries	43	1.4%	0.7	=
<b>TOTAL</b>	<b>1,869</b>	<b>3.4%</b>	<b>1.8</b>	<b>+</b>
<b>Other Services</b>				
812112 Beauty salons	120	4.0%	2.1	=
8111 Automotive repair and maintenance	93	3.3%	1.7	+
81219 Other personal care services	58	9.4%	4.9	+
8123 Drycleaning and laundry services	49	4.1%	2.2	-
813 Religious, grantmaking, civic, professional, and similar organizations	49	0.8%	0.4	=
812113 Nail salons	30	6.0%	3.1	=
812111 Barber shops	22	12.3%	6.4	+
8114 Personal and household goods repair and maintenance	7	2.9%	1.5	+
81291 Pet care (except veterinary) services	4	0.5%	0.3	+
<b>TOTAL</b>	<b>432</b>	<b>2.6%</b>	<b>1.4</b>	<b>=</b>

Note: Data for credit intermediation and related activities in Vienna not available via the Economic Census due to smaller sample size; above data reflects estimates for Navy Federal Credit Union.

Source: 2017 Economic Census; 2012 Economic Census; RCLCO

## Exhibit I-5

### Historical and Projected Employment Fairfax County, VA 1990-2040

HISTORICAL		1990	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019		
<b>WASHINGTON MSA - TOTAL EMPLOYMENT<sup>1</sup></b>																																	
Natural resources and mining		4,638	3,716	3,530	3,596	3,605	3,738	3,694	3,710	3,743	3,734	3,896	4,189	4,118	4,136	4,212	4,194	4,157	4,190	4,206	3,767	3,798	3,622	3,565	3,561	3,412	3,335	3,252	3,371	3,507	4,176		
Construction		152,586	119,012	110,350	111,943	121,461	125,002	129,238	133,561	138,836	146,978	161,951	172,239	174,392	178,855	186,522	195,039	199,012	192,006	178,271	154,227	145,487	149,012	153,014	154,567	156,203	158,701	165,308	167,438	168,592	170,828		
Manufacturing		77,903	71,647	68,021	68,484	71,172	73,138	73,636	76,497	78,604	76,920	78,574	79,298	71,114	67,272	65,708	64,635	63,702	61,705	59,439	57,200	56,594	53,130	51,295	49,441	50,387	51,925	53,016	52,466	52,649	54,092		
Trade, transportation, and utilities		400,618	376,182	368,160	370,391	376,461	381,309	384,200	388,409	392,894	406,574	416,796	386,565	411,431	413,271	418,847	425,388	422,673	423,399	416,637	394,914	395,710	399,680	402,865	405,576	412,331	419,919	422,875	426,134	426,004	426,855		
Information		117,779	112,781	109,636	107,554	107,084	113,396	118,345	122,455	125,778	133,753	151,226	154,822	140,305	131,890	130,763	121,768	119,576	114,487	110,849	101,345	95,843	96,640	92,120	91,120	93,049	91,191	88,211	88,386	90,017	91,789		
Financial activities		166,539	155,045	151,458	154,115	157,006	153,729	152,676	156,016	160,332	165,281	169,663	171,244	173,939	176,770	178,282	182,565	182,455	180,461	173,886	166,502	164,003	162,081	164,191	165,049	166,466	168,362	170,618	172,706	174,070	174,777		
Professional and business services		484,648	477,485	490,370	506,389	517,076	531,022	547,157	575,109	609,378	646,012	697,857	695,945	690,054	700,268	727,375	759,854	783,967	798,707	805,760	789,392	796,175	814,420	829,815	828,032	824,203	842,978	859,128	868,740	881,771	896,755		
Education and health services		268,997	276,209	279,531	286,164	292,877	295,388	297,275	301,148	316,630	326,080	333,278	343,566	360,919	361,810	373,348	380,039	387,508	402,426	411,573	426,442	435,344	449,203	460,007	474,717	481,804	493,131	506,358	515,065	528,506	534,815		
Leisure and hospitality		229,269	224,167	222,613	225,872	232,421	240,574	240,954	243,289	243,985	249,185	271,512	223,076	274,883	283,697	293,016	303,079	303,866	309,369	320,356	316,233	320,098	330,924	345,129	357,242	365,543	380,410	391,190	403,175	410,994	415,880		
Other services		155,961	154,480	156,923	163,396	169,940	173,254	175,934	176,942	179,820	179,811	188,212	191,745	194,369	192,269	201,269	202,944	205,151	212,979	218,778	216,037	216,775	221,240	227,416	228,303	231,039	234,224	238,357	243,310	247,284	246,751		
Government		860,416	880,730	892,990	893,773	867,742	838,610	807,245	810,114	766,821	781,927	790,451	796,680	786,367	832,668	844,725	854,102	862,208	866,719	881,265	894,905	921,982	927,546	922,733	916,640	907,183	914,842	921,967	924,434	925,895	927,932		
<b>TOTAL</b>		<b>2,919,354</b>	<b>2,851,454</b>	<b>2,853,582</b>	<b>2,891,677</b>	<b>2,916,845</b>	<b>2,929,160</b>	<b>2,930,354</b>	<b>2,987,250</b>	<b>3,016,821</b>	<b>3,116,255</b>	<b>3,263,416</b>	<b>3,220,369</b>	<b>3,281,891</b>	<b>3,342,906</b>	<b>3,424,067</b>	<b>3,493,607</b>	<b>3,534,275</b>	<b>3,566,448</b>	<b>3,581,020</b>	<b>3,520,964</b>	<b>3,551,809</b>	<b>3,607,498</b>	<b>3,652,150</b>	<b>3,674,248</b>	<b>3,691,620</b>	<b>3,759,018</b>	<b>3,820,280</b>	<b>3,865,225</b>	<b>3,909,289</b>	<b>3,944,650</b>		
<b>FAIRFAX COUNTY - TOTAL EMPLOYMENT<sup>2</sup></b>																																	
Natural resources and mining		341	295	256	276	272	255	231	223	234	224	187	215	196	176	188	216	240	191	237	274	346	255	270	328	287	249	288	279	265	332		
Construction		30,172	22,098	19,928	20,600	22,377	22,821	23,873	25,012	26,453	28,174	31,581	31,513	30,479	30,675	31,448	33,317	33,812	31,125	28,072	25,141	24,381	24,587	25,089	24,724	23,729	22,928	23,196	23,540	24,244	25,049		
Manufacturing		15,311	15,065	14,267	13,159	13,436	13,574	14,232	15,655	14,931	12,098	12,123	12,992	11,724	12,056	10,985	11,501	11,193	10,890	10,674	10,101	9,666	9,220	8,459	6,489	6,426	6,210	5,640	5,855	5,711	5,680		
Trade, transportation, and utilities		73,159	69,748	68,951	71,154	75,009	75,243	76,642	76,795	77,496	78,977	80,245	79,834	77,576	77,751	77,354	79,732	79,045	78,541	76,871	72,742	72,167	73,689	73,881	74,293	74,648	75,860	76,356	76,398	76,484	77,678		
Information		22,623	23,455	24,036	22,848	24,446	27,194	31,370	35,576	39,629	42,198	49,310	47,163	36,355	35,434	34,946	30,513	29,049	28,102	27,702	24,968	23,244	22,333	21,776	21,776	22,817	21,919	20,454	19,867	19,680	20,272		
Financial activities		23,252	23,535	23,598	25,532	26,960	25,866	27,156	28,554	30,143	30,412	30,472	30,777	31,783	32,457	33,131	34,535	35,150	34,459	32,620	31,141	31,640	31,939	31,994	32,883	32,434	33,566	35,345	37,489	38,068	38,256		
Professional and business services		86,032	87,441	89,774	93,603	96,253	102,756	109,054	121,089	135,629	152,245	168,321	170,929	164,098	167,582	178,903	193,616	200,407	208,368	213,482	211,056	214,294	216,889	221,380	217,588	208,806	209,062	211,429	213,371	218,597	223,519		
Education and health services		25,186	27,259	28,594	30,240	32,326	34,040	35,782	38,086	38,121	40,831	41,769	42,972	44,209	44,855	44,774	47,521	48,879	51,113	53,021	54,140	55,596	57,069	58,182	58,961	60,056	62,764	65,599	67,283	70,017	71,671		
Leisure and hospitality		27,876	27,921	28,629	30,355	32,537	34,068	34,720	37,244	37,026	37,990	39,940	41,002	41,523	42,379	43,284	43,665	44,197	45,471	46,159	44,332	44,539	45,511	47,255	47,929	48,566	51,395	53,443	54,169	54,674	54,941		
Other services		14,404	14,202	14,815	15,553	16,720	17,209	17,666	18,508	20,392	18,948	19,774	20,311	20,755	20,321	19,887	20,015	19,986	20,575	20,668	20,028	19,874	20,380	20,833	20,889	20,917	21,072	21,341	21,194	21,163	20,626		
Government		59,934	60,668	60,824	61,725	63,773	63,959	61,810	60,644	61,484	61,973	63,996	65,273	66,343	67,226	69,358	71,089	72,960	76,592	76,222	77,062	77,800	79,248	81,371	80,956	80,844	81,505	81,176	81,234	82,380	82,663		
<b>TOTAL</b>		<b>378,290</b>	<b>371,687</b>	<b>373,672</b>	<b>385,045</b>	<b>404,109</b>	<b>416,985</b>	<b>432,536</b>	<b>457,386</b>	<b>481,538</b>	<b>504,070</b>	<b>537,718</b>	<b>542,981</b>	<b>525,041</b>	<b>530,912</b>	<b>544,258</b>	<b>565,720</b>	<b>574,918</b>	<b>585,427</b>	<b>585,728</b>	<b>570,985</b>	<b>573,547</b>	<b>581,120</b>	<b>590,490</b>	<b>586,816</b>	<b>579,530</b>	<b>586,530</b>	<b>594,267</b>	<b>600,679</b>	<b>611,283</b>	<b>620,687</b>		
<b>FAIRFAX COUNTY - CAPTURE BY INDUSTRY</b>																																	
Natural resources and mining		7.4%	7.9%	7.3%	7.7%	7.5%	6.8%	6.3%	6.0%	6.3%	6.0%	4.8%	5.1%	4.8%	4.3%	4.5%	5.2%	5.8%	4.6%	5.6%	7.3%	9.1%	7.0%	7.6%	9.2%	8.4%	7.5%	8.9%	8.3%	7.6%	8.0%		
Construction		19.8%	18.6%	18.1%	18.4%	18.4%	18.3%	18.5%	18.7%	19.1%	19.2%	19.5%	18.3%	17.5%	17.2%	16.9%	17.1%	17.0%	16.2%	15.7%	16.3%	16.8%	16.5%	16.4%	16.0%	15.2%	14.4%	14.0%	14.1%	14.4%	14.7%		
Manufacturing		19.7%	21.0%	21.0%	19.2%	18.9%	18.6%	19.3%	20.5%	19.0%	15.7%	15.4%	16.4%	16.5%	17.9%	16.7%	17.8%	17.6%	17.6%	18.0%	17.7%	17.1%	17.4%	16.5%	13.1%	12.8%	12.0%	10.6%	11.2%	10.8%	10.5%		
Trade, transportation, and utilities		18.3%	18.5%	18.7%	19.2%	19.9%	19.7%	19.9%	19.8%	19.7%	19.4%	19.3%	20.7%	18.9%	18.8%	18.5%	18.7%	18.6%	18.5%	18.4%	18.2%	18.4%	18.3%	18.3%	18.1%	18.1%	18.1%	18.1%	17.9%	18.0%	18.2%		
Information		19.2%	20.8%	21.9%	21.2%	22.8%	24.0%	26.5%	29.1%	31.5%	31.5%	32.6%	30.5%	25.9%	26.9%	26.7%	25.1%	24.3%	24.5%	25.0%	24.6%	24.3%	23.1%	23.6%	23.9%	24.5%	24.0%	23.2%	22.5%	21.9%	22.1%		
Financial activities		14.0%	15.2%	15.6%	16.6%	17.2%	16.8%	17.8%	18.3%	18.8%	18.4%	18.0%	18.0%	18.3%	18.4%	18.6%	18.9%	19.3%	19.1%	18.8%	18.7%	19.3%	19.7%	19.5%	19.9%	19.5%	19.9%	20.7%	21.7%	21.9%	21.9%		
Professional and business services		17.8%	18.3%	18.3%	18.5%	18.6%	19.4%	19.9%	21.1%	22.3%	23.6%	24.1%	24.6%	23.8%	23.9%	24.6%	25.5%	25.6%	26.1%	26.5%	26.7%	26.9%	26.6%	26.7%	26.3%	25.3%	24.8%	24.6%	24.6%	24.8%	24.9%		
Education and health services		9.4%	9.9%	10.2%	10.6%	11.0%	11.5%	12.0%	12.6%	12.0%	12.5%	12.5%	12.5%	12.2%	12.4%	12.0%	12.5%	12.6%	12.7%	12.9%	12.7%	12.8%	12.7%	12.6%	12.4%	12.5%	12.7%	13.0%	13.1%	13.2%	13.4%		
Leisure and hospitality		12.2%	12.5%	12.9%	13.4%	14.0%	14.2%	14.4%	15.3%	15.2%	15.2%	14.7%	18.4%	15.1%	14.9%	14.8%																	

## Exhibit I-5

### Historical and Projected Employment Fairfax County, VA 1990-2040

ASSUMPTION	PROJECTED																										
	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036	2037	2038	2039	2040	
<b>WASHINGTON MSA - TOTAL EMPLOYMENT<sup>2</sup></b>	1,370	1,349	1,388	1,407	1,383	1,292	1,332	1,399	1,426	1,432	1,425	1,415	1,402	1,386	1,373	1,366	1,364	1,362	1,359	1,355	1,351	1,347	1,343	1,340	1,340	1,337	
Natural resources and mining	148,473	153,994	155,909	155,935	159,309	162,106	172,605	183,254	186,999	188,984	190,876	190,339	189,115	187,502	186,685	187,372	188,374	189,215	190,669	192,682	194,486	195,957	197,478	199,378	201,389	203,391	
Construction	53,491	54,169	54,856	55,477	56,978	55,124	55,005	55,838	56,146	55,809	54,860	53,946	52,969	52,085	51,201	50,467	49,904	49,240	48,637	48,027	47,442	46,936	46,457	46,002	45,586	45,234	
Manufacturing	402,499	405,413	407,619	408,467	408,292	389,163	400,793	415,254	425,321	428,728	430,694	432,813	434,344	436,381	437,516	438,469	439,092	439,322	440,100	441,173	442,680	444,827	447,192	449,764	452,667	455,985	
Trade, transportation, and utilities	76,552	74,287	74,139	74,948	76,739	74,709	74,869	77,809	80,418	81,689	82,743	83,906	85,083	86,406	87,165	87,588	87,844	88,116	88,555	88,952	89,235	89,476	89,764	90,028	90,206	90,367	
Information	151,330	153,409	156,909	159,100	160,899	159,424	162,385	166,511	169,653	171,110	171,991	173,384	175,183	176,892	179,057	181,914	184,921	188,255	191,721	195,235	198,971	202,243	205,131	208,316	211,716	215,050	
Financial activities	722,775	737,123	747,193	760,932	779,449	770,559	795,244	820,285	839,124	846,922	857,988	869,657	882,386	896,977	908,949	922,824	936,661	951,018	965,621	980,552	995,701	1,010,335	1,024,581	1,038,505	1,052,009	1,064,928	
Professional and business services	412,732	424,356	431,450	442,561	449,023	419,591	425,107	440,944	453,567	459,622	465,184	470,051	473,741	476,665	480,305	485,576	490,799	496,387	501,651	506,274	510,317	513,547	516,480	518,937	521,063	523,045	
Education and health services	310,108	320,019	328,823	333,576	337,312	257,187	263,342	277,692	293,347	307,110	323,661	338,407	354,239	369,367	385,659	396,151	401,282	407,150	412,353	417,618	422,841	427,936	433,939	439,809	445,936	452,299	
Leisure and hospitality	188,984	195,980	206,594	208,750	210,781	203,910	204,719	209,396	213,013	214,235	213,743	212,997	212,075	211,091	210,215	210,119	210,348	210,335	210,420	210,407	210,478	210,677	211,053	211,734	212,497	213,427	
Other services	689,113	696,105	700,711	703,256	708,334	699,154	698,399	706,034	713,467	719,543	725,343	730,170	735,399	740,944	747,527	754,200	759,620	764,286	768,390	772,315	776,522	780,641	784,697	788,792	792,991	797,431	
Government	188,984	195,980	206,594	208,750	210,781	203,910	204,719	209,396	213,013	214,235	213,743	212,997	212,075	211,091	210,215	210,119	210,348	210,335	210,420	210,407	210,478	210,677	211,053	211,734	212,497	213,427	
<b>TOTAL</b>	<b>3,157,427</b>	<b>3,216,204</b>	<b>3,265,591</b>	<b>3,304,409</b>	<b>3,348,499</b>	<b>3,192,219</b>	<b>3,253,800</b>	<b>3,354,416</b>	<b>3,432,481</b>	<b>3,475,184</b>	<b>3,518,418</b>	<b>3,557,085</b>	<b>3,596,176</b>	<b>3,635,697</b>	<b>3,675,652</b>	<b>3,716,047</b>	<b>3,750,209</b>	<b>3,784,686</b>	<b>3,819,480</b>	<b>3,854,593</b>	<b>3,890,029</b>	<b>3,923,926</b>	<b>3,958,118</b>	<b>3,992,608</b>	<b>4,027,399</b>	<b>4,062,493</b>	
<b>FAIRFAX COUNTY - CAPTURE OF TOTAL EMPLOYMENT<sup>3</sup></b>																											
Natural resources and mining	0.24%	4.3%	3.8%	3.4%	2.9%	2.4%	2.2%	2.0%	1.8%	1.6%	1.4%	1.2%	0.9%	0.7%	0.5%	0.3%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
Construction	-0.22%	15.9%	15.8%	15.9%	15.8%	16.5%	16.4%	16.3%	16.2%	16.1%	16.0%	15.9%	15.8%	15.7%	15.6%	15.5%	15.4%	15.4%	15.3%	15.2%	15.1%	15.0%	14.9%	14.8%	14.7%	14.6%	14.5%
Manufacturing	-0.38%	13.5%	14.0%	14.8%	14.5%	14.2%	14.0%	13.8%	13.6%	13.4%	13.2%	13.0%	12.9%	12.7%	12.5%	12.3%	12.1%	11.9%	11.7%	11.5%	11.4%	11.2%	11.0%	10.8%	10.6%	10.4%	10.2%
Trade, transportation, and utilities	-0.08%	14.1%	14.3%	14.3%	14.3%	14.1%	14.0%	13.9%	13.8%	13.7%	13.6%	13.5%	13.4%	13.3%	13.2%	13.1%	13.0%	12.8%	12.7%	12.6%	12.5%	12.4%	12.3%	12.2%	12.1%	12.0%	11.9%
Information	-0.37%	4.2%	4.1%	4.1%	3.9%	3.2%	3.1%	2.9%	2.8%	2.7%	2.5%	2.4%	2.3%	2.1%	2.0%	1.8%	1.7%	1.6%	1.4%	1.3%	1.2%	1.0%	0.9%	0.8%	0.6%	0.5%	0.3%
Financial activities	0.19%	6.6%	6.6%	6.7%	6.7%	6.7%	6.6%	6.5%	6.5%	6.4%	6.3%	6.2%	6.2%	6.1%	6.0%	5.9%	5.9%	5.8%	5.7%	5.7%	5.6%	5.5%	5.4%	5.4%	5.3%	5.2%	5.1%
Professional and business services	0.04%	4.6%	4.8%	4.7%	4.6%	4.4%	4.3%	4.3%	4.2%	4.1%	4.0%	3.9%	3.8%	3.7%	3.6%	3.5%	3.5%	3.4%	3.3%	3.2%	3.1%	3.0%	2.9%	2.8%	2.7%	2.6%	
Education and health services	0.04%	6.6%	6.6%	6.6%	6.6%	6.6%	6.6%	6.5%	6.5%	6.4%	6.4%	6.4%	6.3%	6.3%	6.2%	6.2%	6.1%	6.1%	6.0%	6.0%	6.0%	5.9%	5.9%	5.8%	5.8%	5.8%	
Leisure and hospitality	-0.15%	8.0%	8.0%	8.9%	8.7%	8.7%	8.7%	8.7%	8.7%	8.7%	8.6%	8.6%	8.6%	8.6%	8.6%	8.6%	8.6%	8.6%	8.6%	8.6%	8.6%	8.6%	8.5%	8.5%	8.5%	8.5%	
Other services	-0.11%	4.0%	3.7%	3.7%	3.6%	3.7%	3.6%	3.5%	3.3%	3.2%	3.1%	3.0%	2.8%	2.7%	2.6%	2.5%	2.4%	2.2%	2.1%	2.0%	1.9%	1.8%	1.6%	1.5%	1.4%	1.3%	1.1%
Government	0.04%	9.7%	9.6%	9.6%	9.7%	9.7%	9.7%	9.8%	9.8%	9.8%	9.8%	9.8%	9.8%	9.8%	9.8%	9.9%	9.9%	9.9%	9.9%	9.9%	9.9%	9.9%	10.0%	10.0%	10.0%	10.0%	
<b>TOTAL</b>		<b>8.2%</b>	<b>8.3%</b>	<b>8.3%</b>	<b>8.3%</b>	<b>8.2%</b>	<b>8.2%</b>	<b>8.1%</b>	<b>8.1%</b>	<b>8.0%</b>	<b>7.9%</b>	<b>7.9%</b>	<b>7.8%</b>	<b>7.7%</b>	<b>7.7%</b>	<b>7.6%</b>	<b>7.5%</b>	<b>7.4%</b>	<b>7.4%</b>	<b>7.3%</b>	<b>7.2%</b>	<b>7.2%</b>	<b>7.1%</b>	<b>7.0%</b>	<b>7.0%</b>	<b>6.9%</b>	<b>6.8%</b>
<b>FAIRFAX COUNTY - TOTAL EMPLOYMENT</b>																											
Natural resources and mining	102	119	115	106	110	106	112	121	127	131	134	136	138	140	142	144	147	149	152	155	157	159	161	163	165	167	
Construction	21,450	21,608	21,919	22,424	23,360	23,387	24,494	25,573	25,655	25,484	25,291	24,775	24,173	23,530	22,993	22,642	22,326	21,988	21,711	21,487	21,233	20,936	20,638	20,373	20,111	19,840	
Manufacturing	6,397	5,763	6,122	6,018	5,983	5,581	5,361	5,232	5,050	4,809	4,521	4,243	3,967	3,705	3,449	3,210	2,987	2,762	2,546	2,333	2,126	1,928	1,734	1,544	1,359	1,177	
Trade, transportation, and utilities	72,713	73,203	73,079	73,335	74,300	70,515	72,310	74,594	76,071	76,346	76,359	76,397	76,329	76,346	76,203	76,027	75,792	75,489	75,279	75,118	75,029	75,046	75,096	75,176	75,308	75,504	
Information	18,400	17,225	16,665	16,386	16,948	16,223	15,980	16,319	16,568	16,527	16,433	16,353	16,267	16,199	16,017	15,769	15,489	15,209	14,955	14,691	14,406	14,112	13,823	13,529	13,221	12,908	
Financial activities	30,170	31,780	34,060	34,794	35,218	35,199	36,161	37,397	38,425	39,081	39,609	40,260	41,011	41,747	42,599	43,624	44,697	45,861	47,070	48,304	49,607	50,808	51,924	53,126	54,396	55,661	
Professional and business services	179,251	181,404	183,518	188,640	194,280	192,349	198,806	205,669	210,396	212,665	215,739	219,018	222,550	226,562	229,922	233,773	237,625	241,620	245,687	249,849	254,077	258,186	262,205	266,153	270,003	273,713	
Education and health services	52,531	54,976	56,360	58,631	60,174	56,403	57,319	59,636	61,531	62,541	63,490	64,348	65,048	65,646	66,346	67,274	68,200	69,179	70,114	70,963	71,734	72,395	73,015	73,571	74,081	74,573	
Leisure and hospitality	41,897	43,720	44,179	44,375	44,562	33,599	34,016	35,461	37,029	38,315	39,905	41,226	42,634	43,912	45,282	45,932	46,937	46,011	45,993	45,966	45,920	45,845	45,850	45,824	45,807	45,796	
Other services	17,002	17,547	17,996	17,865	17,619	16,814	16,650	16,793	16,843	16,697	16,417	16,119	15,809	15,497	15,195	14,951	14,729	14,491	14,259	14,020	13,787	13,562	13,347	13,151	12,958	12,773	
Government	61,394	61,290	61,574	62,571	63,101	62,583	62,816	63,806	64,784	65,645	66,486	67,242	68,062	68,871	69,804	70,752	71,586	72,343	73,045	73,734	74,452	75,165	75,876	76,593	77,324	78,081	
<b>TOTAL</b>	<b>501,309</b>	<b>508,635</b>	<b>515,587</b>	<b>525,146</b>	<b>535,655</b>	<b>512,758</b>	<b>524,024</b>	<b>540,303</b>	<b>552,479</b>	<b>558,241</b>	<b>564,384</b>	<b>570,116</b>	<b>575,988</b>	<b>582,156</b>	<b>587,953</b>	<b>594,099</b>	<b>599,517</b>	<b>605,102</b>	<b>610,811</b>	<b>616,621</b>	<b>622,530</b>	<b>628,139</b>	<b>633,668</b>	<b>639,203</b>	<b>644,733</b>	<b>650,195</b>	

2019-2040  
Growth

<sup>1</sup> BLS Estimate for all of the individual districts, counties, and independent cities that comprise the Washington, D.C., metropolitan statistical area

<sup>2</sup> Employment totals reflect historical estimates from Moody's Analytics, applying projected growth rates by industry from Moody's Analytics for 2021, 2022, and 2023, and then applying overall growth rates from Metropolitan Washington Council of Governments and the distribution of that growth from Moody's Analytics for 2024 onwards.

<sup>3</sup> Future capture by industry is trended based on 2000-2019 growth according to BLS

Source: Bureau of Labor Statistics; Baltimore Metropolitan Council; Howard County; Moody's Analytics; RCLCO



## Exhibit I-6

### Capture of Projected Employment Vienna, VA 2019-2040

	"Fair Share" and "Upside" Office Demand, Without Expansion from Navy Federal			"STATUS QUO" BASED ON HISTORICAL		"UPSIDE" BASED ON TARGET INDUSTRIES <sup>1</sup>	
	NEW JOBS IN FAIRFAX COUNTY 2019-2040	SHARE OF JOBS REQUIRING OFFICE SPACE	NEW OFFICE-USING JOBS IN FAIRFAX COUNTY 2019-2040	VIENNA CAPTURE	NEW OFFICE-USING JOBS IN VIENNA (FAIR SHARE)	VIENNA CAPTURE	NEW OFFICE-USING JOBS IN VIENNA (UPSIDE)
Natural resources and mining	57	0%	0	0.0%	0	0.0%	0
Construction	-3,520	3%	-88	0.0%	0	0.0%	0
Manufacturing	-4,806	5%	-240	2.1%	-5	2.1%	-5
Trade, Transportation, & Utilities	1,205	5%	60	1.6%	1	1.6%	1
Information	-4,040	60%	-2,424	0.1%	-2	0.1%	-2
Financial Activities	20,443	90%	18,399	0.5%	85	0.5%	85
Professional & Business Services	79,433	80%	63,546	0.5%	326	2.5%	1,616
Educational & Health Services	14,399	20%	2,880	1.3%	36	1.3%	36
Leisure & Hospitality	1,235	5%	62	3.4%	2	3.4%	2
Other Services	-4,846	20%	-969	2.6%	-25	2.6%	-25
<b>TOTAL</b>	<b>99,559</b>		<b>81,225</b>		<b>419</b>		<b>1,709</b>
					<i>200 SF / Employee</i>		<i>200 SF / Employee</i>
					<b>84,000 SF of Office</b>		<b>342,000 SF of Office</b>
					<b>4,000 SF / Year</b>		<b>16,000 SF / Year</b>

<sup>1</sup> Upside scenarios assume that Vienna captures 2.0% of future growth from "target industries," which are highlighted on Exhibit I-8

Source: RCLCO

## Exhibit I-7

### Capture of Projected Employment Vienna, VA 2019-2040

"Fair Share" Industrial Demand, Based on Projected Job Growth/Decay by Industry

	NEW JOBS IN FAIRFAX COUNTY 2019-2040	SHARE OF JOBS REQUIRING INDUSTRIAL SPACE	NEW INDUSTRIAL-USING JOBS IN FAIRFAX COUNTY 2019-2040	"STATUS QUO" BASED ON HISTORICAL	
				VIENNA CAPTURE	NEW INDUSTRIAL-USING JOBS IN VIENNA
Natural resources and mining	57	0%	0	0.0%	0
Construction	-3,520	5%	-176	0.0%	0
Manufacturing	-4,806	80%	-3,845	2.1%	-80
Trade, Transportation, & Utilities	1,205	40%	482	1.6%	8
Information	-4,040	20%	-808	0.1%	-1
Financial Activities	20,443	0%	0	0.5%	0
Professional & Business Services	79,433	5%	3,972	0.5%	20
Educational & Health Services	14,399	0%	0	1.3%	0
Leisure & Hospitality	1,235	0%	0	3.4%	0
Other Services	-4,846	0%	0	2.6%	0
<b>TOTAL</b>	<b>99,559</b>		<b>-375</b>		<b>-53</b>

*700 SF / Employee*  
**-37,000 SF of Industrial**  
*-2,000 SF / Year*

"Upside" Capture Needed to Pull from Elsewhere in County to Maintain Occupied Space and Fill Vacant Space

	EXISTING FAIRFAX EMPLOYMENT BASE (2019)	SHARE OF JOBS REQUIRING INDUSTRIAL SPACE	EXISTING INDUSTRIAL- USING JOBS IN FAIRFAX COUNTY (2019)	PULL FROM EXISTING EMPLOYMENT ELSEWHERE		"UPSIDE"	
				CAPTURE OF EXISTING JOBS NEEDED TO PULL FROM OTHER PARTS OF FAIRFAX COUNTY	JOBS PULLED FROM OTHER PARTS OF FAIRFAX COUNTY ("UPSIDE")	PLUS: NEW INDUSTRIAL- USING JOBS IN VIENNA	NEW INDUSTRIAL-USING JOBS IN VIENNA ("UPSIDE")
Natural resources and mining	110	0%	0	0.00%	0	0	0
Construction	23,360	5%	1,168	0.00%	0	0	0
Manufacturing	5,983	80%	4,786	1.67%	80	-80	0
Trade, Transportation, & Utilities	74,300	40%	29,720	0.07%	20	8	28
Information	16,948	20%	3,390	0.00%	0	-1	-1
Financial Activities	35,218	0%	0	0.00%	0	0	0
Professional & Business Services	194,280	5%	9,714	0.05%	5	20	25
Educational & Health Services	60,174	0%	0	0.00%	0	0	0
Leisure & Hospitality	44,562	0%	0	0.00%	0	0	0
Other Services	17,619	0%	0	0.00%	0	0	0
<b>TOTAL</b>	<b>472,554</b>		<b>48,778</b>	<b>0.22%</b>	<b>105</b>	<b>-53</b>	<b>52</b>

*700 SF / Employee*  
**-37,000 SF of Industrial**  
*-2,000 SF / Year*

*700 SF / Employee*  
**37,000 SF of Industrial**  
*2,000 SF / Year*

Source: RCLCO

**Exhibit I-8**

Potential Target Industries  
Vienna, VA  
March 2021

TARGET INDUSTRIES	EMPLOYMENT SECTOR	NAICS CODE
Offices of lawyers	Professional & Business Services	54111
Other legal services	Professional & Business Services	54119
Accounting, tax preparation, bookkeeping, and payroll services	Professional & Business Services	54121
Architectural services	Professional & Business Services	54131
Landscape architectural services	Professional & Business Services	54132
Engineering services	Professional & Business Services	54133
Interior design services	Professional & Business Services	54141
Graphic design services	Professional & Business Services	54143
Other specialized design services	Professional & Business Services	54149
Computer systems design and related services	Professional & Business Services	54151
Environmental consulting services	Professional & Business Services	54162
Other scientific and technical consulting services	Professional & Business Services	54169
Advertising agencies	Professional & Business Services	54181
Public relations agencies	Professional & Business Services	54182
Other services related to advertising	Professional & Business Services	54189
Employment placement agencies and executive search services	Professional & Business Services	56131

*Note: Target industries include those not currently represented or underrepresented in the Town of Vienna with potential to capture based on physical or locational characteristics  
Source: RCLCO*

# Multi-Family Residential

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## Appendix

## Exhibit II-1

Comparison of Vienna to Other Surrounding Jurisdictions  
Washington, D.C., Metropolitan Area  
March 2020

	VIENNA	TYSONS	MCLEAN	HERNDON	FAIRFAX CITY	FALLS CHURCH	ALEXANDRIA
<b>DEMOGRAPHICS</b>							
Total Households	5,635	13,427	17,549	7,635	8,893	6,183	76,949
Total Population	16,189	27,651	49,931	23,979	24,095	15,081	157,992
Median Household Income	\$158,000	\$110,000	\$200,000	\$109,000	\$112,000	\$128,000	\$104,000
% with Incomes \$200,000+	38%	22%	53%	18%	21%	30%	19%
% with Incomes \$150,000 to \$199,999	15%	12%	14%	13%	15%	14%	14%
% with Incomes \$100,000 to \$149,999	19%	23%	13%	25%	21%	17%	20%
% with Incomes \$50,000 to \$99,999	15%	26%	11%	25%	23%	25%	26%
% with Incomes < \$50,000	12%	17%	9%	18%	20%	14%	22%
Median Age	42.0	38.2	47.6	34.8	40.1	39.5	37.8
% of Households Under 35	9%	25%	5%	19%	18%	18%	26%
% of Households 35-44	16%	21%	11%	24%	18%	19%	22%
% of Households 45-54	21%	18%	20%	21%	18%	19%	18%
% of Households 55-64	24%	15%	25%	19%	20%	20%	15%
% of Households 65+	30%	20%	39%	17%	25%	25%	19%
<b>EMPLOYMENT</b>							
Total Employment	8,601	76,317	15,169	18,600	25,462	11,324	94,657
Natural Resources	6	5	8	0	3	6	9
Construction	403	1,507	770	721	1,579	693	3,327
Manufacturing	205	1,416	195	234	331	159	1,439
Trade, Transportation, and Utilities	1,645	12,014	1,560	1,642	3,832	2,118	11,223
Information	120	8,828	306	1,341	598	304	3,268
Financial Activities	734	10,344	2,667	1,405	2,039	887	7,521
Professional and Business Services	1,190	23,791	2,250	7,459	5,254	1,309	25,639
Education and Health Services	1,681	4,693	4,059	1,691	4,546	2,796	12,246
Leisure and Hospitality	1,366	9,088	1,636	2,649	3,230	1,302	10,103
Other Services	914	4,327	1,421	1,091	2,101	1,548	13,179
Government	337	304	297	367	1,949	202	6,703
Employees Per Household	1.5	5.7	0.9	2.4	2.9	1.8	1.2
<b>REAL ESTATE<sup>1</sup></b>							
Office Space	2,240,893	27,322,778	2,711,276	5,894,604	4,863,533	1,531,904	21,297,746
Industrial Space	252,712	460,734	22,863	451,661	533,239	119,234	4,146,293
Retail Space	977,867	5,420,796	921,480	1,207,423	3,403,470	1,372,475	7,076,215
Hotel Rooms	114	3,503	142	1,439	849	318	4,546
Apartment Units	313	7,089	256	1,628	1,662	1,941	34,703

## Exhibit II-1

### Comparison of Vienna to Other Surrounding Jurisdictions Washington, D.C., Metropolitan Area March 2020

	VIENNA	TYSONS	MCLEAN	HERNDON	FAIRFAX CITY	FALLS CHURCH	ALEXANDRIA
<b>HOUSING MARKET</b>							
<b>Housing Units</b>	<b>5,752</b>	<b>14,604</b>	<b>18,062</b>	<b>8,012</b>	<b>9,314</b>	<b>6,468</b>	<b>80,270</b>
<i>Single-Family Detached</i>	4,771	1,615	14,795	3,108	5,167	2,651	10,997
<i>Single-Family Attached</i>	448	2,058	1,933	2,265	1,826	827	17,916
<i>Multifamily</i>	534	10,921	1,306	2,623	2,322	2,973	51,301
<i>Other</i>	0	13	31	16	0	16	56
<b>Home Sales (Last Year)</b>	<b>316</b>	<b>360</b>	<b>880</b>	<b>329</b>	<b>439</b>	<b>208</b>	<b>3,150</b>
<i>% Single-Family Detached</i>	84%	8%	85%	44%	60%	49%	17%
<i>% Condominium or Townhome</i>	16%	92%	15%	56%	40%	51%	83%
<b>Avg. Sales Price</b>	<b>\$1,035,000</b>	<b>\$549,000</b>	<b>\$1,425,000</b>	<b>\$485,000</b>	<b>\$617,000</b>	<b>\$837,000</b>	<b>\$711,000</b>
<i>for Single-Family Detached</i>	\$1,120,000	\$1,021,000	\$1,523,000	\$645,000	\$707,000	\$1,150,000	\$1,048,000
<i>for Condominium or Townhome</i>	\$593,000	\$506,000	\$889,000	\$358,000	\$484,000	\$535,000	\$640,000
<i>% of Sales Under \$250,000</i>	1%	7%	0%	14%	10%	5%	10%
<i>% of Sales \$250,000 to \$499,999</i>	6%	53%	1%	42%	15%	21%	32%
<i>% of Sales \$500,000 to \$749,999</i>	27%	18%	5%	32%	51%	22%	27%
<i>% of Sales \$750,000 to \$1,000,000</i>	27%	15%	27%	11%	18%	23%	18%
<i>% of Sales \$1,000,000+</i>	40%	8%	67%	1%	6%	29%	13%

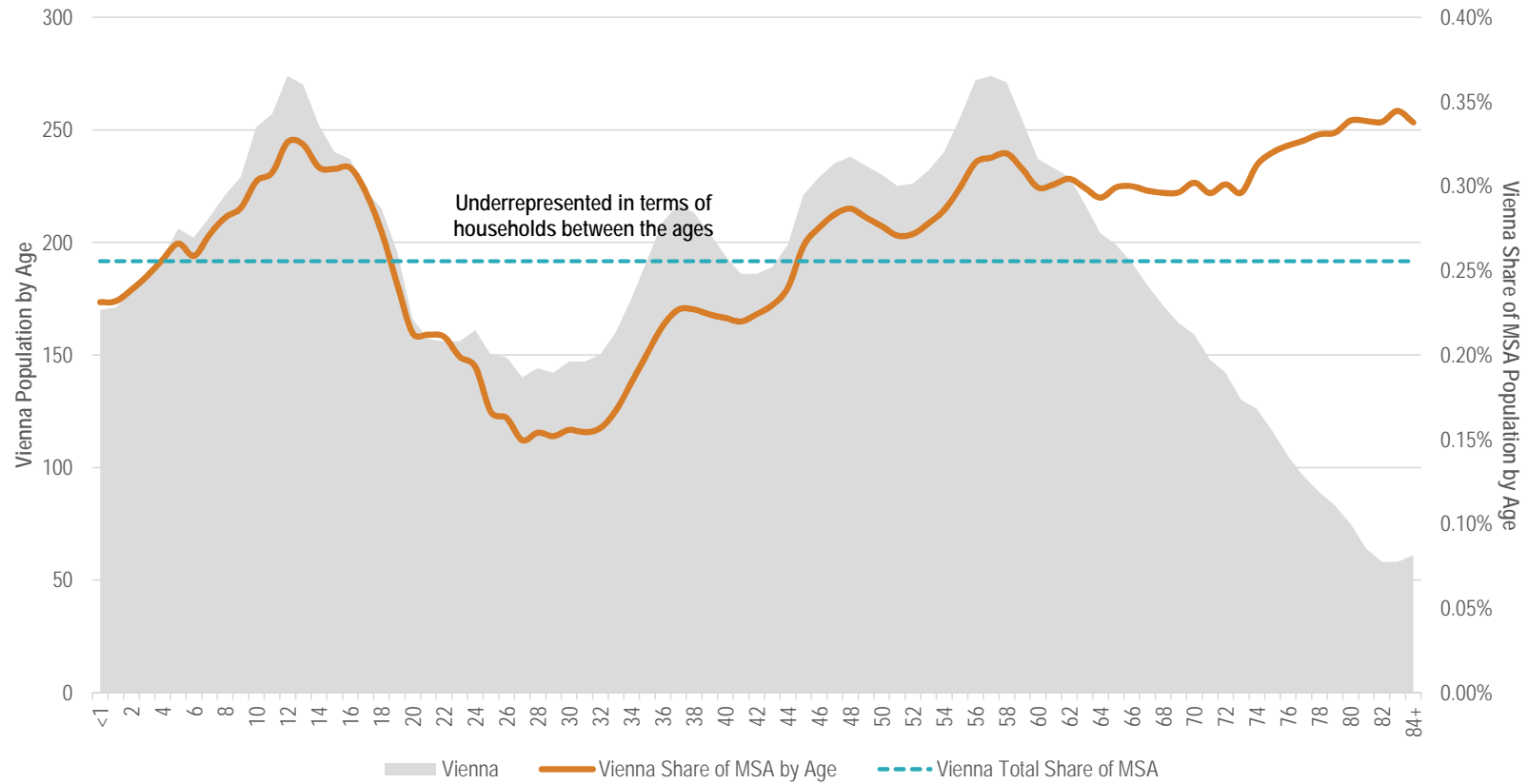
<sup>1</sup> Inventory data is from CoStar and therefore may not match inventories provided by RCLCO and Streetsense.

Note: Cells highlighted in red are 50% or less the average for Vienna, McLean, Herndon, Fairfax, and Falls Church (except for the demographics section, which considers all jurisdictions). Cells highlighted in green are 150% or more the average for Vienna, McLean, Herndon, Fairfax, and Falls Church (except for the demographics section, which considers all jurisdictions).

Source: Esri; Redfin; CoStar; RCLCO

Exhibit II-2

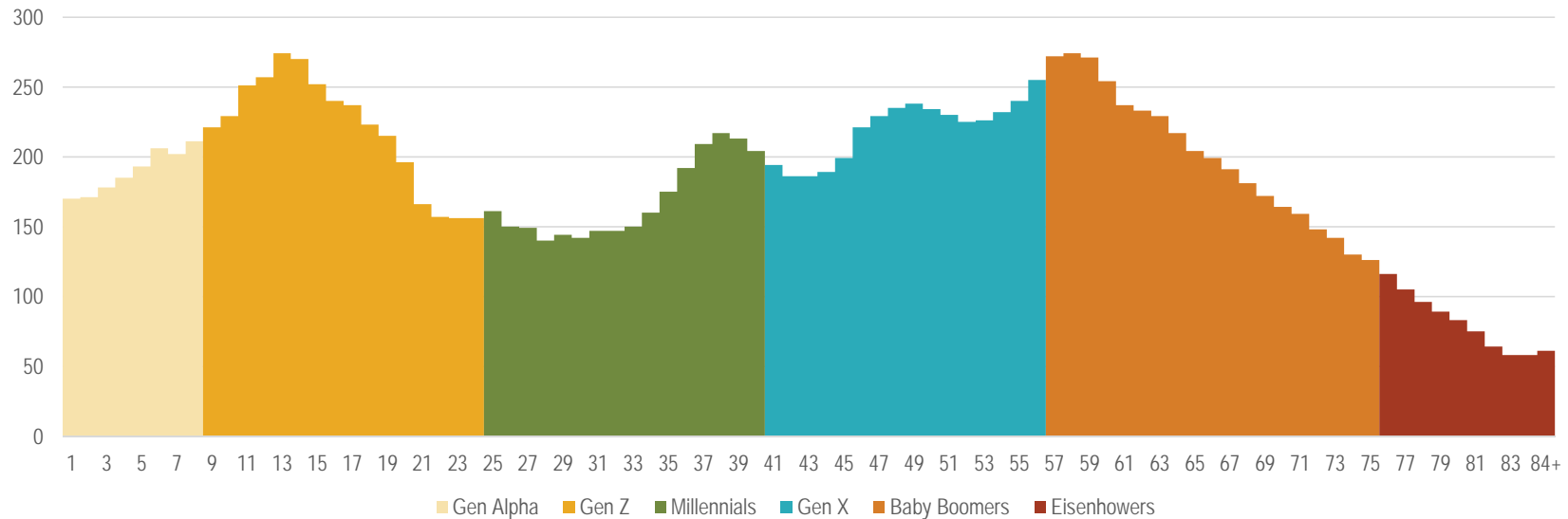
Vienna Population by Age and Share of the MSA's Population by Age  
Vienna, VA; Washington, DC MSA  
2020



Source: RCLCO

Exhibit II-3

Distribution of Population and Housing Preferences Over Time  
Vienna, VA  
2020



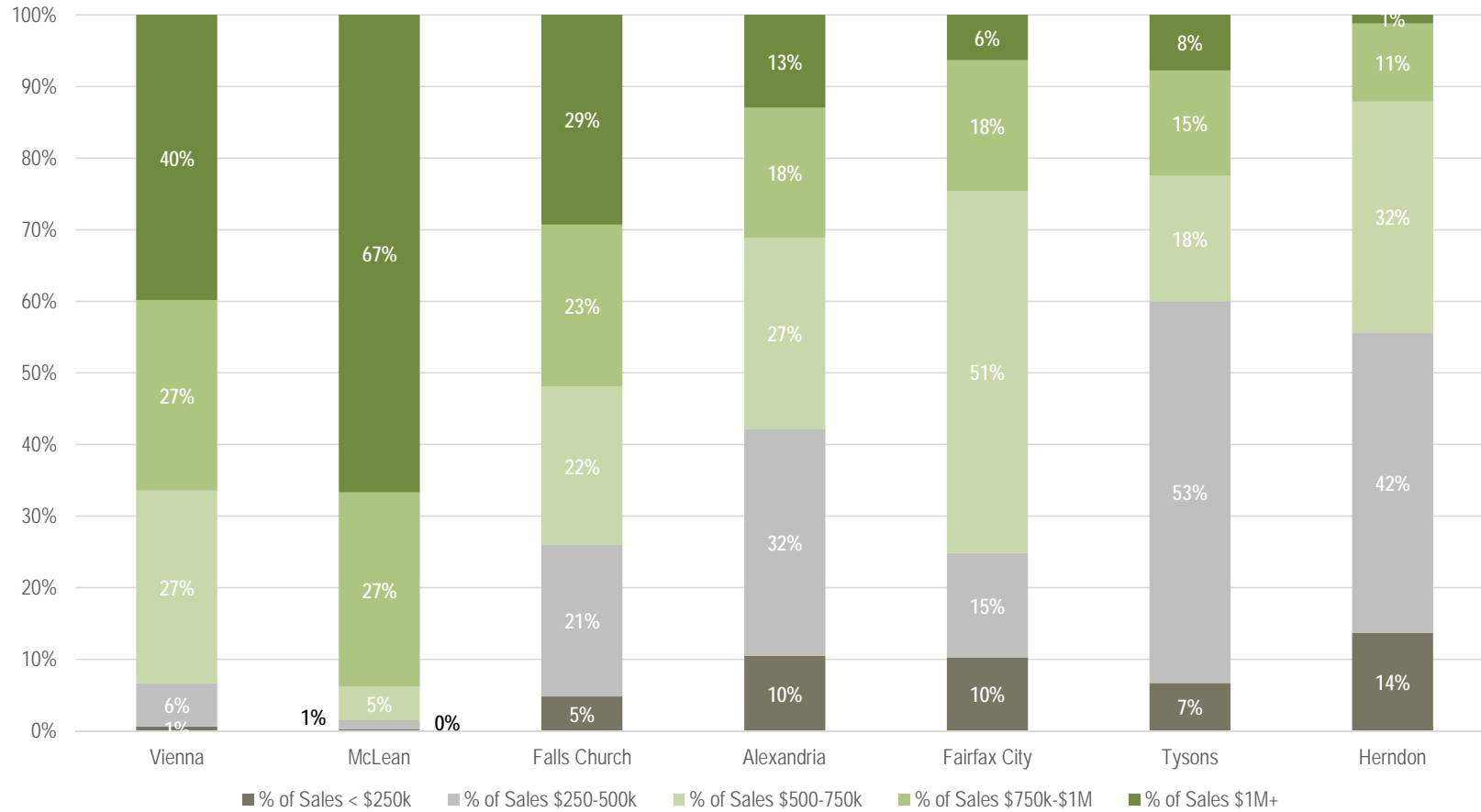
YEAR	STUDENT HOUSING	RENTAL HOUSING	RENT AS COUPLE OR BUY CONDO / TH	YOUNG FAMILY OWN	MATURE FAMILY OWN	EMPTY NESTER DOWNSIZE	BUY / RENT RETIREMENT HOME
EST.	< 21	21-25	26-30	31-40	41-50	51-60	60+
2020	Gen Z	Gen Z	Millennials	Millennials	Gen X	Baby Boomers	Baby Boomers
2025	Gen Z	Gen Z	Gen Z	Millennials	Gen X	Gen X	Baby Boomers
2030	Gen Z	Gen Z	Gen Z	Millennials	Gen Z	Gen X	Baby Boomers
2035	Gen Alpha	Gen Z	Gen Z	Gen Z	Millennials	Millennials	Gen X
2040	Gen Alpha	Gen Alpha	Gen Z	Gen Z	Millennials	Millennials	Gen X
			Gen Alpha		Gen Z		

Source: RCLCO



Exhibit II-4

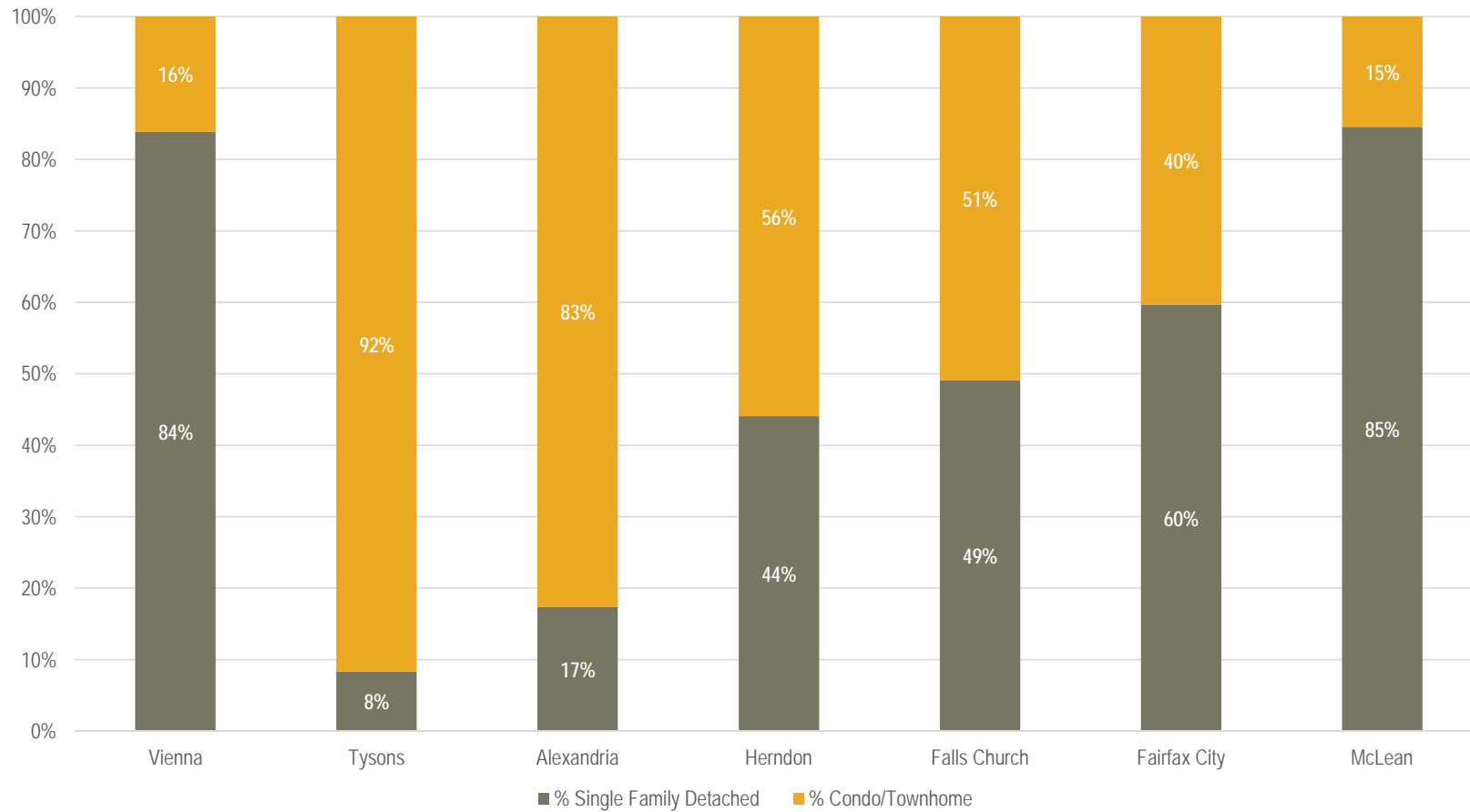
Distribution of Home Sales by Price and Location  
Northern Virginia  
February 2020 - February 2021



Source: RCLCO; Redfin

Exhibit II-5

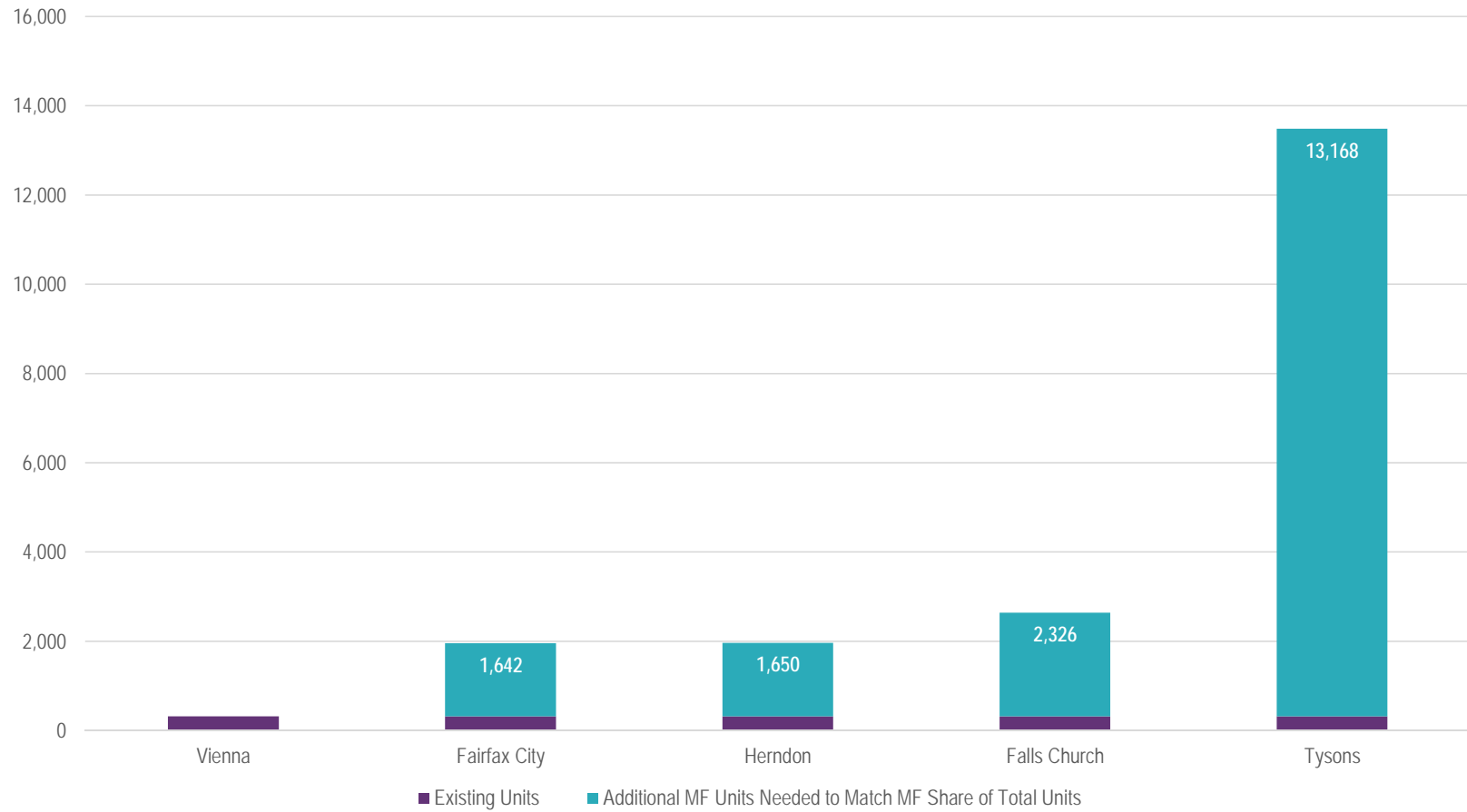
Distribution of Home Sales by Home Type and Location  
Northern Virginia  
February 2020 - February 2021



Source: RCLCO; Redfin

Exhibit II-6

Additional Multifamily Units Needed to Match Multifamily Share of Total Housing Units in Other Jurisdictions  
Northern Virginia  
2020



Source: RCLCO

## Exhibit II-7







Examples of Higher-Density Residential Product: Townhome  
Northern Virginia  
March 2020

PHOTOS	COMMUNITY	PRODUCT TYPE	UNIT MIX	RENT			AVG. UNIT SIZE	SUCCESS FACTORS	MARKET AUDIENCE	
				MIN	MAX	AVERAGE				
	Junction Square	2017	Total	20	\$645,000	- \$813,474	\$728,426	2,840	Walkability to Downtown Interior Courtyard High-Quality Finishes	Empty Nesters Mature Professionals
	711 Monroe St	For-Sale	3BR	15%	\$790,000	- \$812,500	\$800,833	3,021		
	Herndon, VA 20170	Townhomes	4BR	85%	\$645,000	- \$813,474	\$715,648	2,818		
	Boulevard 6060	2020	Total	37	\$714,467	- \$902,149	\$798,994	2,394	Retail Nearby Quality Finishes Secluded Location	Young Professionals Families
	6061 Dreher Ct	For-Sale	3BR	6%	\$719,474	- \$719,474	\$719,474	1,792		
	Falls Church, VA 22044	Townhomes	4BR	41%	\$714,467	- \$862,078	\$793,888	2,471		
			5BR	53%	\$744,999	- \$902,149	\$811,801	2,401		
	Mayfair on Main	2018	Total	25	\$740,000	- \$882,000	\$793,121	2,291	Located on Main Street Rooftop Decks High-Quality Finishes	Empty Nesters Mature Professionals Young Professionals
	10355 Main St.	For-Sale	3BR	100%	\$740,000	- \$882,000	\$793,121	2,291		
	Fairfax, VA 22030	Townhomes								

Source: RCLCO; Redfin

## Exhibit II-8

Examples of Higher-Density Residential Product: Condominium  
Northern Virginia  
March 2020

PHOTOS	COMMUNITY	PRODUCT TYPE	UNIT MIX	RENT			AVG. UNIT SIZE	SUCCESS FACTORS	MARKET AUDIENCE	
				MIN	MAX	AVERAGE				
 	Del Ray Place	2018	Total	49	\$285,000	- \$854,400	\$465,590	735	Main Street Retail Proximity to Employment Attainable Prices	Young Professionals
	1800 Mt Vernon Ave	For-Sale	1BR	83%	\$285,000	- \$854,400	\$418,552	639		
	Alexandria, VA 22301	Condominiums	2BR	17%	\$663,435	- \$725,000	\$700,778	1,182		
 	Hamden Row	2017	Total	55	\$499,990	- \$3,175,000	\$1,093,661	1,312	Walkability to Downtown Metro Access High-End SFD Nearby	Empty Nesters
	4915 Hamden Ln	For-Sale	1BR	50%	\$499,990	- \$944,990	\$621,055	828		
	Bethesda, MD 20814	Condominiums	2BR	47%	\$992,000	- \$2,029,990	\$1,465,721	1,735		
			3BR	3%	\$3,175,000	- \$3,175,000	\$3,175,000	2,780		
 	The Lofts at Pender Oaks	2021	Total	8	\$566,990	- \$616,990	\$591,990	2,120	Nearby Grocery Regional Access Near Health Employment	Young Families Young Professionals
	3892 Rainier Dr.	For-Sale	3BR	100%	\$566,990	- \$616,990	\$591,990	2,120		
	Fairfax, VA 22033	Stacked Flats (Under Construction)								

Source: RCLCO; Redfin

## Exhibit II-9

Examples of Higher-Density Residential Product: Rental Apartment  
Northern Virginia  
March 2020

PHOTOS	COMMUNITY	PRODUCT TYPE	UNIT MIX	RENT			AVG. UNIT SIZE	SUCCESS FACTORS	MARKET AUDIENCE
				MIN	MAX	AVERAGE			
	Overture Fair Ridge	2017	Total	200	\$1,535 - \$3,937	\$2,748	994	Programmed Amenities Age-Restricted (62+) Excellent Finishes	Empty Nesters
	3955 Fair Ridge Dr	Active Adult	1BR	46%	\$1,535 - \$3,500	\$2,390	797		
	Fairfax, VA 22033	Apartments	2BR	55%	\$1,786 - \$3,937	\$3,047	1,158		
	West Broad Residences	2016	Total	285	\$1,627 - \$3,216	\$2,379	982	Ground-Floor Grocer Main Street Location Few Competitors	Young Professionals Mature Professionals Families Empty Nesters
	301 W Broad St.	Market Rate	1BR	62%	\$1,627 - \$2,663	\$1,986	740		
	Falls Church, VA 22046	Apartments	2BR	38%	\$2,176 - \$3,216	\$2,706	1,184		
	The Kensington of Falls Church	2017	Total	103	\$4,958 - \$10,372	\$6,706	N/A	Assisted Living Meals included Memory Care	Seniors
	700 W Broad St	Assisted Living	Studio	71%	\$4,958 - \$5,901	\$5,462	N/A		
	Falls Church, VA 22046	Apartments	1BR	29%	\$9,429 - \$10,372	\$9,735	N/A		

Note: Unit sizes at The Kensington of Falls Church are unavailable.

Source: RCLCO; CoStar; Property Websites

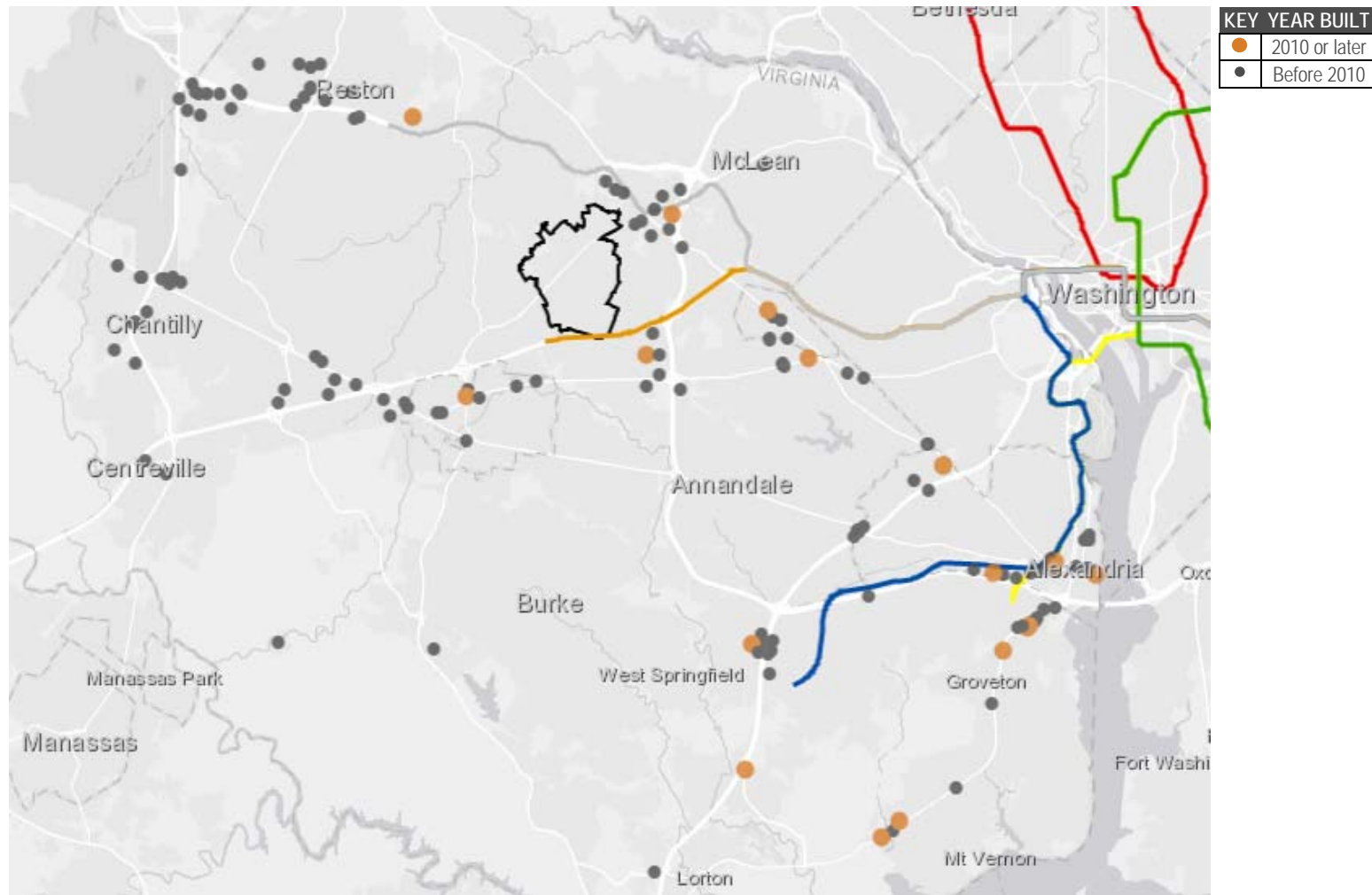
# Hospitality

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## Appendix

## Exhibit III-1

Map of Existing Hospitality  
Fairfax County and Fairfax City  
March 2021

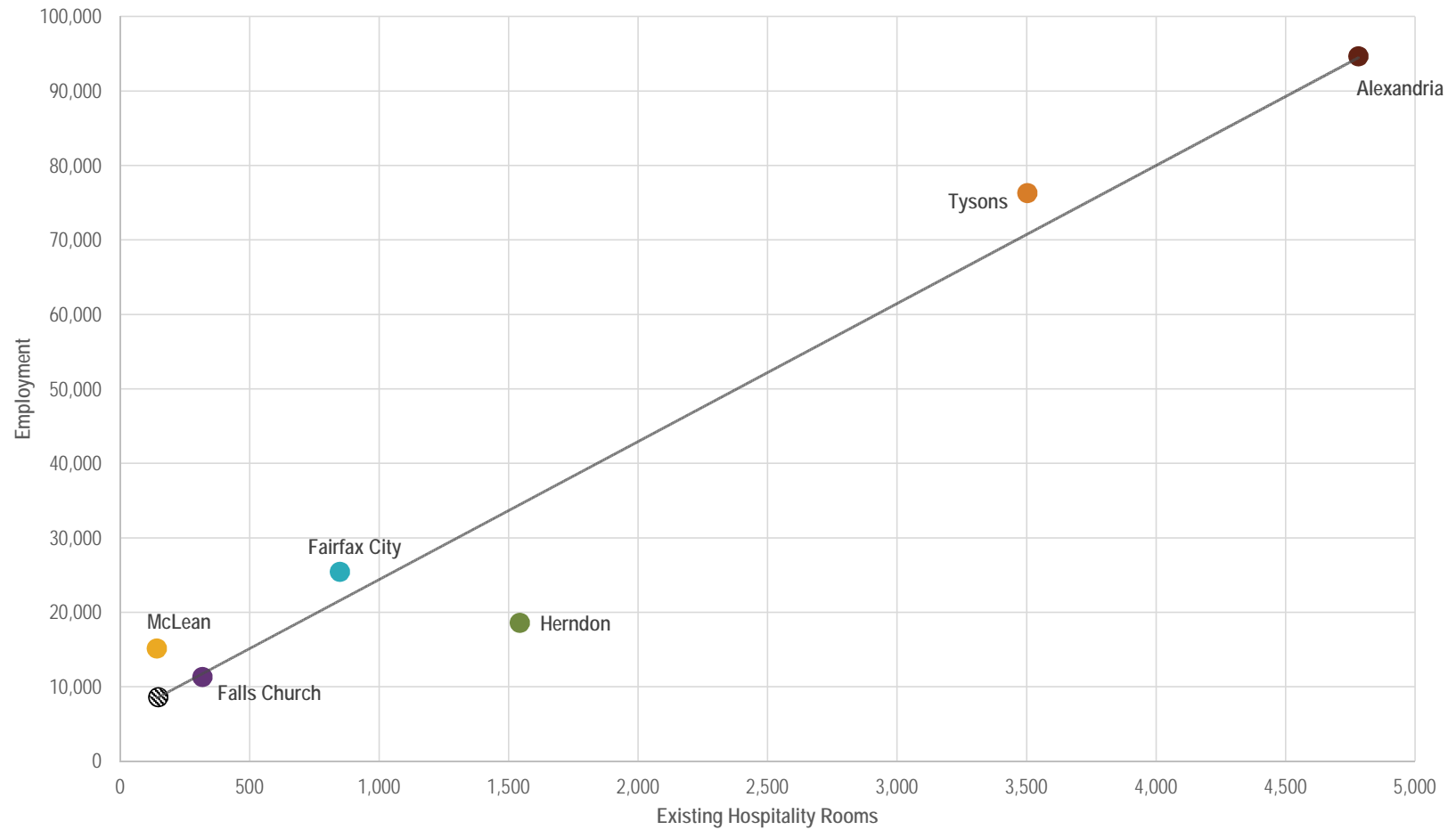


Source: RCLCO; CoStar; ArcGIS



## Exhibit III-2

Relationship of Employment to Hospitality  
Northern Virginia  
March 2021



## Exhibit III-3




### Comparison of Boutique Hotel Case Studies United States March 2020

	TOURIST DESTINATION		ACCESSIBILITY	EMPLOYMENT		MIXED-USE ENVIRONMENT					
	GRAND BOHEMIAN HOTEL ASHEVILLE, AUTOGRAPH COLLECTION	MORRISON HOUSE OLD TOWN ALEXANDRIA, AUTOGRAPH COLLECTION	ARCHER HOTEL BURLINGTON	THE LASZLO HOTEL	HOTEL CARMICHAEL, AUTOGRAPH COLLECTION	THE ESQUIRE HOTEL ASCEND HOTEL COLLECTION	THE HARPETH FRANKLIN DOWNTOWN, CURIO COLLECTION BY HILTON	GRAND HOTEL	TEMPERANCE HOUSE HOTEL	THE MAYTON INN	VIENNA - INTERSECTION OF MAPLE & CENTER
<b>HOTEL CHARACTERISTICS</b>											
City	Asheville	Alexandria	Burlington	Parker	Carmel	Gastonia	Franklin	McKinney	Newtown	Cary	Vienna
Metro Area	Asheville, NC	Washington, DC	Boston, MA	Denver, CO	Indianapolis, IN	Charlotte, NC	Nashville, TN	Dallas, TX	Philadelphia, PA	Raleigh, NC	Washington, DC
Year Built	2009	1985	2018	2019	2020	1918	2019	2008	1772	2016	
Year Renovated	N/A	2016	N/A	N/A	N/A	2018	N/A	2009	1985	N/A	
Sleeping Rooms	104	45	147	51	122	35	119	46	11	45	
Total Meeting Space	5,000 Sq. Ft.	1,000 Sq. Ft.	7,000 Sq. Ft.	4,000 Sq. Ft.	4,000 Sq. Ft.	N/A	8,000 Sq. Ft.	2,000 Sq. Ft.	N/A	5,000 Sq. Ft.	
<b>DEMOGRAPHICS &amp; ECONOMICS</b>											
Total Households (1-Mile Radius)	1,948	15,501	1,222	4,133	5,452	3,098	3,027	4,585	3,157	4,336	4,527
% Under 35	25%	23%	15%	29%	24%	18%	19%	24%	11%	18%	9%
% 35 to 54	36%	37%	33%	43%	34%	33%	35%	39%	33%	36%	36%
% 55+	40%	41%	52%	28%	41%	49%	47%	37%	56%	46%	55%
Median Household Income (1-Mile Radius)	\$42,878	\$136,604	\$115,385	\$77,254	\$67,251	\$32,631	\$64,872	\$45,723	\$120,258	\$69,911	\$160,213
Difference From MSA Median Household Income	-\$11,171	\$32,713	\$25,158	-\$3,412	\$5,979	-\$30,852	-\$2,287	-\$25,056	\$48,492	-\$7,049	\$56,322
Homeownership Rate (1-Mile Radius)	47%	48%	56%	43%	37%	37%	59%	41%	68%	55%	82%
Total Employment (1 Mile Radius)	16,336	46,146	18,914	9,249	14,190	6,545	6,838	7,202	7,019	5,231	6,150
<b>LOCATION CHARACTERISTICS</b>											
Retail SF (1-Mile Radius)	799,577	2,385,742	2,384,732	2,038,124	1,934,382	1,377,695	1,327,180	824,834	1,007,974	1,067,918	894,241
Multifamily Units (1-Mile Radius)	706	5,629	677	1,871	3,520	440	927	477	187	615	14
Walk Score	48	96	49	58	71	61	57	90	73	62	88
Bike Score	52	82	44	69	77	48	57	67	55	51	78
Traffic Count (AADT)	23,000	6,400	25,200	17,822	14,070	5,000	20,747	7,715	7,892	8,180	30,000
Nearest Highway (Miles Driving)	0.7	0.9	0.9	2.7	1.1	1.6	2.9	1.5	3.0	2.2	1.8
Major Attractions Located Nearby	The Billmore, Various Outdoor Recreation Amenities	Old Town Alexandria, Old Town Alexandria Waterfront	-	-	-	-	-	-	-	-	-

Source: Esri; CoStar; Walkscore; RCLCC











Exhibit III-4

Success Factors of Boutique Hotel Case Studies  
United States  
March 2020

IS THE LOCATION A TOURIST DESTINATION?		LOCATION	YEAR BUILT	ROOMS
NO		YES		
↓	Grand Bohemian Hotel Asheville, Autograph Collection		Asheville, NC	2009 104
				
		Morrison House Old Town Alexandria, Autograph Collection		Alexandria, VA 1985 45
				
DOES THE LOCATION HAVE STRONG REGIONAL ACCESSIBILITY?		LOCATION	YEAR BUILT	ROOMS
NO		YES		
↓	Archer Hotel Burlington		Burlington, MA	2018 147
				













**Exhibit III-4**

Success Factors of Boutique Hotel Case Studies  
United States  
March 2020

IS THERE A CONCENTRATION OF EMPLOYMENT NEARBY?		LOCATION	YEAR BUILT	ROOMS
NO	YES			
	<b>The Laszlo Hotel</b>		Parker, CO	2019 51
				
	<b>Hotel Carmichael, Autograph Collection</b>		Carmel, IN	2020 122
				
IS THERE A WALKABLE, MIXED-USE ENVIRONMENT?		LOCATION	YEAR BUILT	ROOMS
	YES			
	<b>The Esquire Hotel Ascend Hotel Collection</b>		Gastonia, NC	1918 35
				

## Exhibit III-4

Success Factors of Boutique Hotel Case Studies  
United States  
March 2020

The Harpeth Franklin Downtown, Curio Collection By Hilton	Franklin, TN	2019	119
			
Grand Hotel	McKinney, TX	2008	46
			
Temperance House Hotel	Newtown, PA	1772	11
			
The Mayton Inn	Cary, NC	2016	45
			

Source: Esri; CoStar; Walkscore; RCLCO