

Retail market analysis & strategies for Old Town

September, 2016

JGSCGroup

Market Analysis

JGSCGroup

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MARKET ANALYSIS & STRATEGIES
FOR
OLD TOWN FAIRFAX, VA

September 2016

Introduction

The Fairfax, Virginia, Economic Development Department retained JGSC Group to conduct a market study/retail leakage analysis of Fairfax City, centered in Old Town at the intersection of Main Street and Chain Bridge Road.

JGSC compiled and analyzed data from a variety of sources, including esri, ICSC, U.S. Census Bureau, Bureau of Labor Statistics, and Consumer Expenditure Survey. Data was compiled for 1-, 3-, and 5-mile radii around the Old Town, as well as the city of Fairfax. For a regional comparison, we compiled and analyzed the same data for Fairfax County (which excludes the City). For the purposes of this report we define and refer to Old Town as our "study area," the 1-, 3-, and 5-mile rings as our "trade area," and Fairfax County as "the region."

Among other things, the analyses looked at retail supply, demand, and leakage; office worker and student populations; vehicle traffic counts; demographics; psychographics; population density; age groups; income levels; internet access and usage; business and employment; and retail spending patterns. The complete analysis is included as part of this market profile. The following summarizes our findings.

Site Details

The study is focused on the Old Town neighborhood of Fairfax City, a small area of about one-half square mile. Located just one mile north of George Mason University's Fairfax campus, the neighborhood is home to recent housing development and has a walkable downtown feel. Within the area of Old Town is the Fairfax County courthouse and complex, which is home to numerous County and City agencies and buildings. The area also is home to three shopping centers (University Shopping Center, Courthouse Plaza, and the recently completed Old Town Plaza) as well as various independent operators that dot Main and nearby streets.

Market overview

Old Town is centrally located within Fairfax City, and the intersection of Main Street (Route 236) and Chain Bridge Road (Route 123) is a traditional 100 percent intersection, historically the crossroads of major regional thoroughfares where commerce organically develops. Old Town is central to Fairfax City as the City is central to Fairfax County.

The City has a population of over 24,000 people living in nearly 9,000 households, while the audience within the trade area's 5-mile radius is more than 10 times that population, over a quarter of a million people (267,789) living in more than 91,000 households. While the populations of the City and the study and trade areas represent a significant shopper audience for retail goods and services, we identified two additional unique audience segments for Old Town—the residential students at George Mason University and office workers throughout the area (including those employed by the County and University).

The chart below summarizes the findings of that local consumer audience analysis.

DEMOGRAPHICS	1-mi. Radius	3-mi. Radius	5-mi. Radius	Region
Population (2016)	14,487	114,214	267,789	1,124,231
Est. Pop. Growth (2016-2021)	1.25%	1.08%	0.85%	.65%
Households (2016)	4,395	37,972	91,684	405,962
Household Density (sq. mi.)	1,399	1,343	1,167	1,000
Median Age (total pop.)	38.5	36.9	38.4	38.3
Avg. Household Size	2.59	2.66	2.69	2.74
Households w/ Children	30%	34%	35%	37%

Reflective of the urban character in downtown Fairfax, the population density is highest in the 1- and 3-mile radii around Old Town with greater housing density than the rest of the city and region.

Throughout the city and region, household incomes are very high, with average income for all three radii exceeding $100,000 per year.

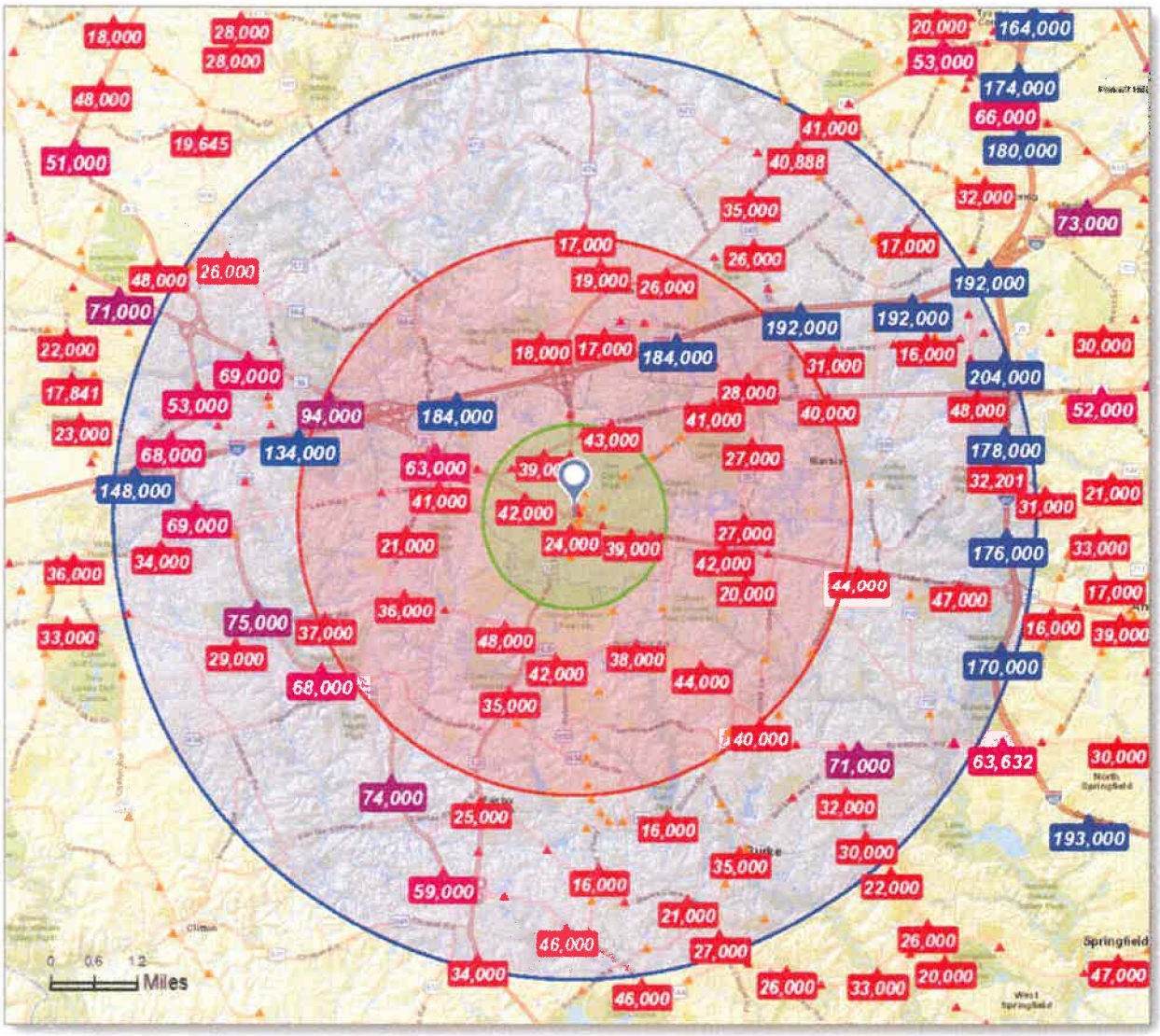
INCOME	1-mi. Radius	3-mi. Radius	5-mi. Radius	Region
Median Annual HH Income	$101,834	$110,850	$115,675	$110,857
Average Annual H Income	$135,697	$144,359	$153,324	$147,644

Although the median and household incomes in the 1-mile radius are slightly lower than the surrounding radii and regional averages, the syndicated data may not reflect the completion of new residential units in the Old Town, which would increase the density and local population, and likely attract more upscale residents. In any case, the population and household income levels trade area would appeal to many retailers considering opening new locations or relocating existing businesses.

Vehicle counts

Throughout Fairfax City are numerous state and federal highways and local arterial roadways that serve the City and Old Town. There are high traffic counts throughout the City and beyond, as is common in much of the region and the greater D.C. metro area. The annual average daily traffic (AADT) along Route 66/Fairfax Boulevard varies between 130,000 and 200,000 vehicles. Similarly, between 24,000 and 60,000 vehicles travel Route 236/Main Street daily, the main East-West roadway through Old Town.

Such traffic volume is indicative of a significant retail audience; the high volume of vehicles—and shoppers—is useful evidence to attract retailers to Old Town. Refer to the inset map for greater detail on the volume of average traffic throughout Fairfax City and the County.



Traffic counts: 1-, 3-, and 5-miles around Old Town

Retail information

Old Town is home to three shopping centers that provide a variety of limited- and full-service dining options, retail stores, and professional and personal services. National chain brands are well represented, both within Old Town and throughout the City. Two area malls, the Fair City Mall and Fairfax Court Shopping Center, are situated on the east and west borders, respectively. These two centers feature typical mall tenants, offering a variety of apparel, crafts, electronics, and entertainment stores, personal and professional services, eateries and a movie theater at Fair City Mall.

Malls, strip malls, and shopping centers are the most common type of retail throughout Fairfax. In keeping with the decreased density of the city relative to Old Town, the retail character follows suit. Much of the infrastructure for retail is large-footprint centers clustered around one or two anchor tenants with numerous smaller operators throughout; some of these centers appear to be in need of or are undergoing redevelopment efforts.

The existing retail offerings do not match the walkable downtown setting of Old Town. Recruitment efforts should, therefore, focus on unique, eclectic dining offerings (sit-down, casual, and outdoor dining); uncommon and specialty gifts; and other specialty retail to create a unique local character in downtown Fairfax.

GMU Student Population

George Mason University's (GMU) main campus is just one mile from the intersection of Chain Bridge Road and Main Street. However, this mile-long stretch is a busy four-lane roadway dominated by university housing, apartments, and some professional offices, making it difficult to draw pedestrian traffic from the campus to Old Town.

This, coupled with the historical disconnect between the local resident population and student body suggests there is an untapped audience segment to be found in the nearby student population. According to GMU, the undergraduate population currently on-campus is 6,000 and projected to increase.

Previous studies conducted by JGSC Group in college communities suggest that the average resident student spends about $46 a week on non-grocery retail purchases. This suggests that GMU students are spending over a quarter of a million dollars per week on retail goods and services, or about $10.5 million during an academic year.

Worker Population

In addition to GMU students, there is a very large population of white-collar office workers who also spend significant amounts on retail goods, dining, and services in the area. The presence of city and county offices, GMU faculty and staff, and numerous other commercial and professional offices present an additional audience segment with significant consumer demand added to the local economy.

Within the 1-mile trade area alone, there are over 31,000 employees of which 18,300 are office workers. According to research from the International Council of Shopping Centers (ICSC), the average office worker spends about $116 per week near their place of work. We estimate that the worker population within the 1-mile radius spends over $105.8 million annually on retail goods and services, representing a significant opportunity for local retailers.

OFFICE WORKER SPENDING	1-mi. Radius	3-mi. Radius	5-mi. Radius	City of Fairfax
Est. Office Workforce	18,307	51,999	110,641	17,981
Est. Annual Spending near work	$105.8M	$300.6M	$639.5M	$103.9M

Pets

Pet ownership in the city, trade area, and region is fairly high; at every level slightly more than half of all households are home to a pet of any kind. Dogs are more popular than cats throughout Fairfax, with about a third of households throughout the city and trade area being home to at least one dog; only about a fifth of households are home to one or more cats.

This is worth considering in the context of local retail that cannot be replicated by online competition or big-box retail. While stores like *PetSmart* offer grooming services for pets, neighborhood retail offerings including gourmet pet treats, grooming, dog walking or doggie day care, veterinarians, or boarding kennels could likely be successful in the study area.

Internet access and usage

Internet access and usage in Fairfax City and the surrounding area are consistent with the region and with the character of a highly educated, professional population. Almost all residents have internet access at home, and between half and two-thirds report accessing the internet via their mobile devices regularly.

Over 50 percent of the population within the trade area and Fairfax City regularly make purchases online, expanding the competition for local retailers. Neighborhood retail that cannot be replicated by online shopping and services—specialty clothing, tailors and custom clothing, unique gifts, and dining—should be the focus of recruitment efforts.

This syndicated data does not analyze the university's fiber optic or wireless networks, or attendant student internet activity and usage.

Consumer demand and retail supply

We analyze consumer spending and retail sales as supply and demand for retail goods, services, and dining within the study and trade areas, as well as the region for a wider comparison. Within the 5-mile radius, total consumer demand exceeds $7 billion annually. Retail leakage—the consumer demand not met by the retail supply—is nearly $700 million.

Examining supply and demand more closely, we see that within the 1-mile radius retail supply exceeds consumer demand by more than $348.2 million, reflecting the draw of consumers from a wider area to the retail-centered destination in Fairfax City. Further analysis reveals that while the retail oversupply is significant, much of it concentrated in just a few categories with over half of all oversupply ($201.4 million) in the category of automotive dealers, many of which are concentrated on Fairfax Boulevard.

This pattern repeats itself when analyzing the 3-mile radius, which has retail oversupply of $281.9 million, a third of which is accounted for by automotive dealers. Aside from this, many of the retail categories in the 3-mile radius have significant unmet demand (retail leakage) and, within the 5-mile radius, every category except for electronics and lawn & garden supply has unmet demand.

This suggests that the oversupply is largely a function of retail clustered in the densest parts of Fairfax City, including shopping centers along Fairfax Boulevard and throughout Old Town. However, the amount of retail leakage present across multiple categories in the region represents significant opportunity for recruitment efforts.

However, there are limitations to what can be recruited due to the retail infrastructure of Old Town. In the near-term, recruitment efforts should focus on expanding and enhancing the retail within the study area with two goals: To create a retail mix that matches the walkable downtown setting of the area and helps create a unique retail corridor that serves the audience segments we identify below.

In the data section we've included the full Consumer Demand and Retail Supply data and analysis. Below is a chart that highlights some of the most relevant categories: Limited service, full service, specialty office supplies, gifts, home furnishings and décor, and clothing.

RETAIL LEAKAGE	1-mi. Radius	3-mi. Radius	5-mi. Radius	Region
Home furnishings/décor	-$6M	$2M	$23M	$169M
Clothing stores	$5M	$66M	$98M	$373M
Office supply/Gifts	-$3M	$12M	$28M	$128M
Full-service dining	-$21M	$23M	$124M	$505M
Limited-service dining	-$21M	$16M	$74M	$515M

(Note: negative leakage represents oversupply)

Target Audience Segments

From our analysis of consumer supply and demand, residential demographics, and the analysis of GMU student and office worker populations, we've identified four distinct audience segments that Old Town's retail offerings should seek to attract:

- Old Town residents, who would patronize neighborhood retail offerings more frequently.
- Fairfax City residents, who are likely to visit Old Town to dine or shop as the retail offerings are expanded and enhanced.
- Local office workers, already present within the county, city, and professional offices, who dine and run errands before/after work and during lunch.
- College students, living on campus and looking for spaces to socialize, dine, and shop that are easy and convenient to reach.

Categories targeted for recruitment

Based on all of our analyses, and keeping in mind the limitations of the retail infrastructure located in Old Town, we recommend a focus on retail offerings that differentiate from both internet shopping and local big box retailers. By offering unique, specialty, and boutique retail in a variety of price points, Old Town residents, office workers, and college students will spend more time and money locally, while consumers from the wider region will be attracted to shop and dine in the area.

In the near-term, recruitment efforts should focus on creating a walkable neighborhood retail experience that attracts and services these audience segments. However, the broad unmet consumer demand and redevelopment opportunities throughout Fairfax suggest future recruitment could enhance and improve the offerings and enhance the destination retail present throughout the city.

We recommend targeting recruitment efforts among retailers in the following categories:

- Limited-service dining (fast casual, counter service): *Limited menu, fast casual, a step above traditional fast-food.*
- Specialty dining: *cafés/coffeehouses that foster social spaces for students and locals; deserts, ice cream, and specialty snack shops.*
- Full-service dining (table service): *Independent and regional operators with a variety of price points and cuisines to serve the office workforce and draw residents from throughout the city.*
- Office Supplies and Gifts: *Specialty papers and office supplies (not Staples or Office Depot), gift boutiques.*
- Clothing and accessories: *small-space boutique stores offering upscale men's and women's clothing and accessories; specialty clothing; tailoring and custom services.*
- Home furnishings and décor: *unique home décor; specialty home furnishings; gifts for the home.*

Attracting GMU Students

The GMU student body is an untapped audience segment that can provide significant increases in foot traffic and consumer retail demand for Old Town. In order to attract this segment to the area, consider the following tactics:

- Work with GMU to co-host student-oriented events in the downtown area, instead of having the events held on-campus. This can include student orientation, job fairs, homecoming activities, outdoor entertainment, and similar activities.
- Create a "Freshman Survival Kit" to be distributed to all incoming freshmen at the beginning of the semester. The kit should include information about and incentives from Old Town merchants, along with other enticements to encourage students to visit the area.
- Explore opportunities for promoting Old Town and its merchants through on-campus marketing and advertising.
- Assuming students are required to provide "community service" as part of their coursework, work with GMU staff to identify community service opportunities (such as clean-ups or tree plantings) that help generate visits and activity in Old Town.
- Work with GMU and local merchants to document and promote job opportunities within Old Town for students that need to work part-time.
- Encourage local merchants to make use of bounce-back offers and other discounts for GMU students to help stimulate and expand trial visits.
- Expand the existing shuttle bus loop to provide extended operations of free transportation between the GMU campus and Old Town, especially on weekends.
- Work with GMU, Fairfax County and other property owners to provide free space for hosting a student art gallery. Hold periodic art shows to help attract GMU students and other visitors to the location.
- Partner with GMU to enroll Old Town merchants in the "Mason Money" program so students can use their pre-paid debit cards at participating merchants.

Work with GMU visual arts classes to arrange to have students provide window merchandising services for retailers in Old Town. The services could be offered in exchange for course credit or similar benefit.

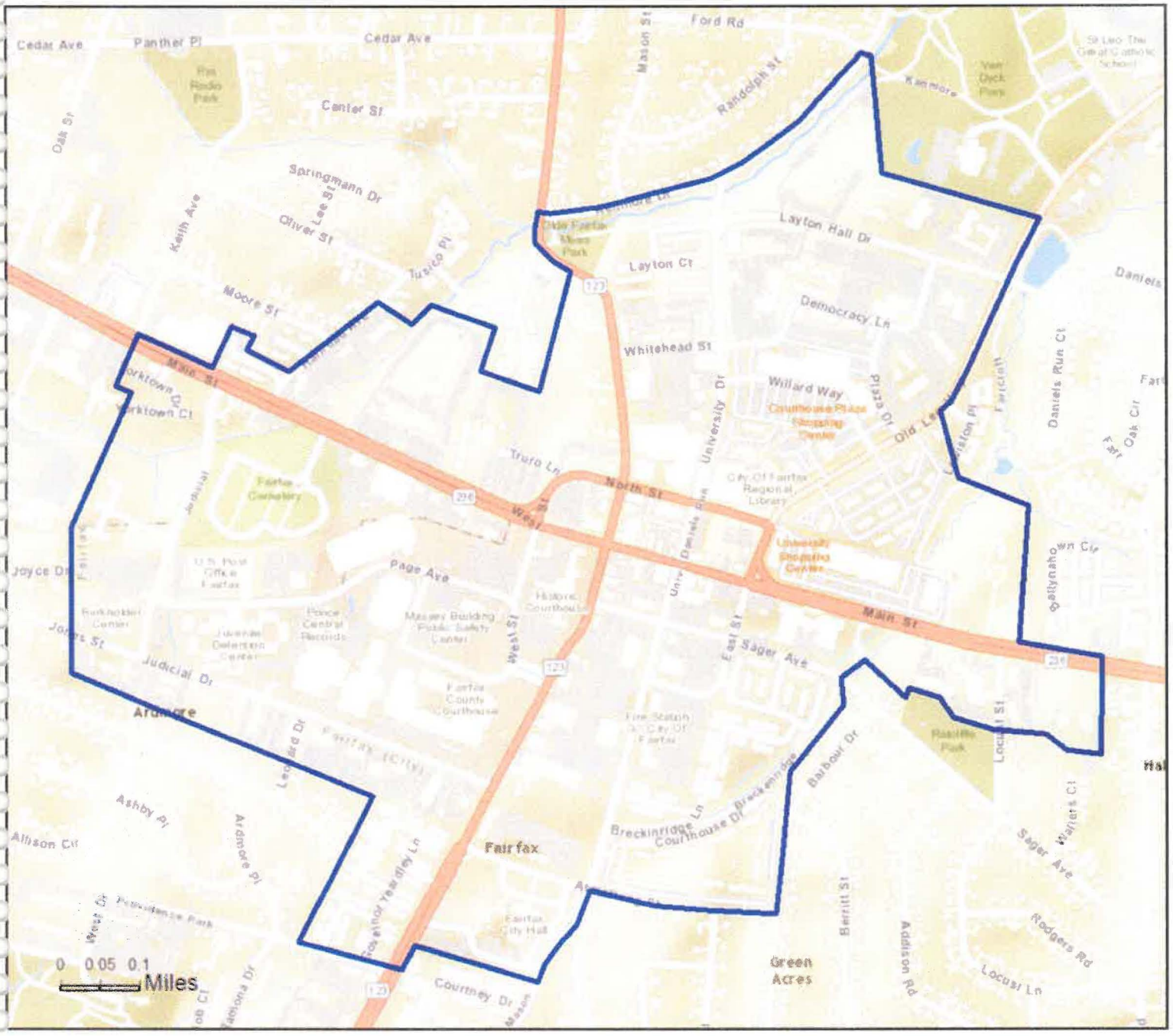
Market Data

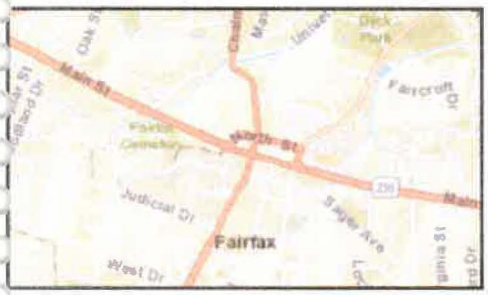
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Site Map

Old Town Fairfax
Area: 0.52 square miles

Prepared by Esri







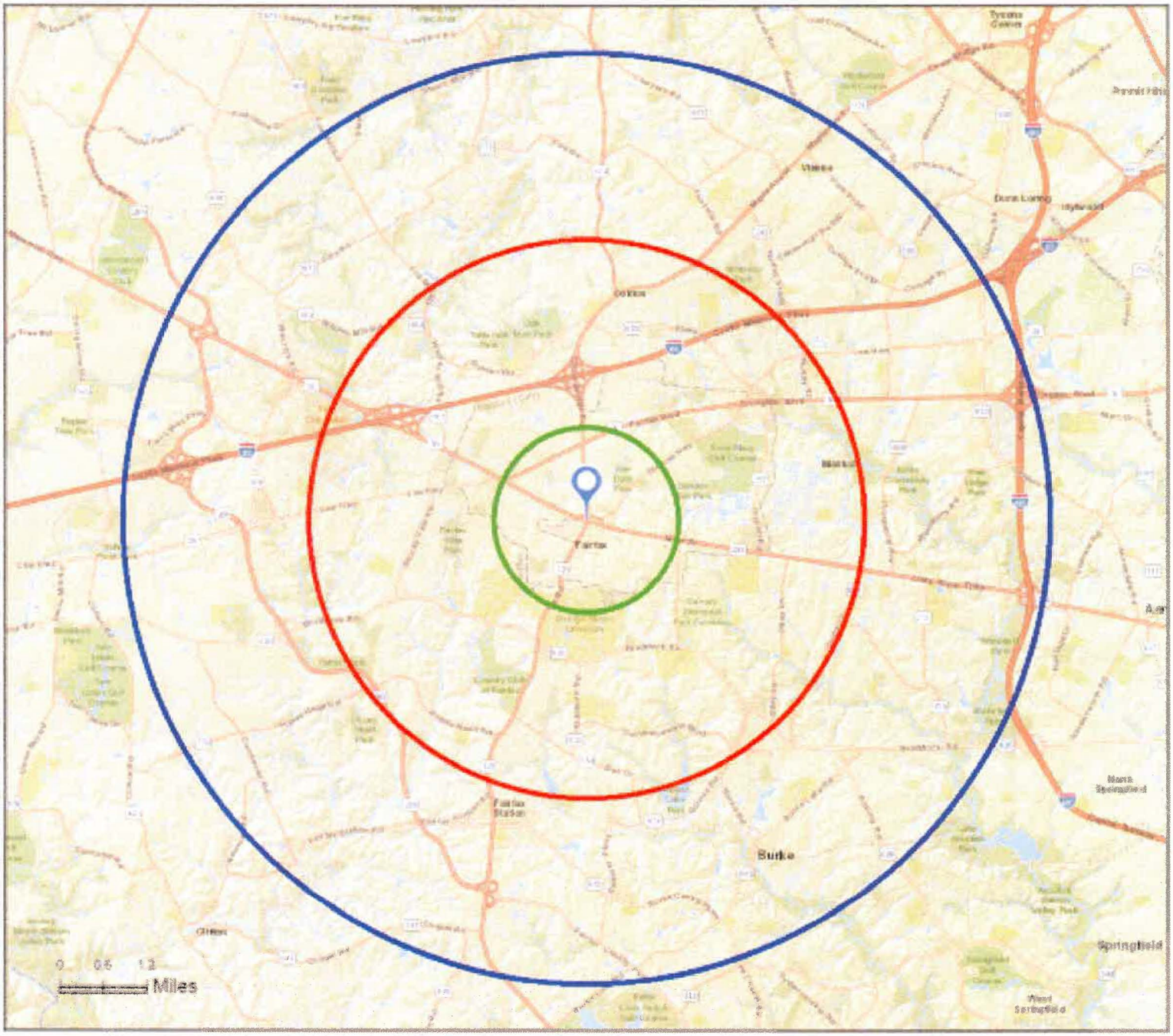
September 06, 2016

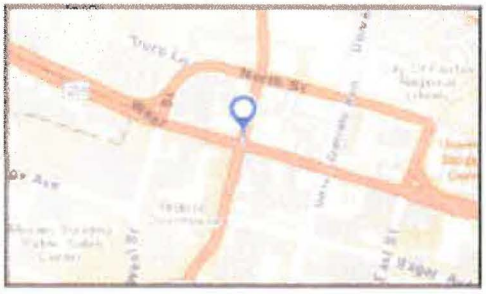
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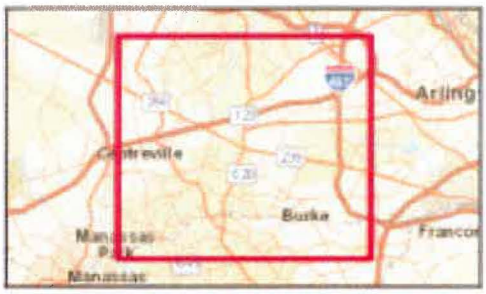
Site Map

Fairfax 1,3,5
10430 Main St, Fairfax, Virginia, 22030
Rings: 1, 3, 5 mile radii

Prepared by Esri







Market Profile

Fairfax 1,3,5
10430 Main St, Fairfax, Virginia, 22030
Rings: 1, 3, 5 mile radii

Prepared by Esri
Latitude: 38.84624
Longitude: -77.30655

	1 mile	3 miles	5 miles
Population Summary			
2000 Total Population	12,055	90,955	225,106
2010 Total Population	13,334	107,568	254,768
2016 Total Population	14,487	114,214	267,789
2016 Group Quarters	2,151	7,438	7,962
2021 Total Population	15,415	120,510	279,363
2016-2021 Annual Rate	1.25%	1.08%	0.85%
Household Summary			
2000 Households	3,996	32,136	80,270
2000 Average Household Size	2.59	2.69	2.73
2010 Households	4,395	37,972	91,684
2010 Average Household Size	2.57	2.65	2.70
2016 Households	4,768	40,121	96,463
2016 Average Household Size	2.59	2.66	2.69
2021 Households	5,109	42,392	100,772
2021 Average Household Size	2.60	2.67	2.69
2016-2021 Annual Rate	1.39%	1.11%	0.88%
2010 Families	2,936	26,182	65,345
2010 Average Family Size	2.99	3.12	3.15
2016 Families	3,157	27,411	67,985
2016 Average Family Size	3.02	3.14	3.15
2021 Families	3,367	28,786	70,568
2021 Average Family Size	3.03	3.15	3.16
2016-2021 Annual Rate	1.30%	0.98%	0.75%
Housing Unit Summary			
2000 Housing Units	4,092	32,857	81,807
Owner Occupied Housing Units	70.4%	70.6%	73.1%
Renter Occupied Housing Units	27.2%	27.2%	25.0%
Vacant Housing Units	2.3%	2.2%	1.9%
2010 Housing Units	4,706	39,579	95,044
Owner Occupied Housing Units	69.1%	65.5%	69.4%
Renter Occupied Housing Units	24.3%	30.4%	27.1%
Vacant Housing Units	6.6%	4.1%	3.5%
2016 Housing Units	5,102	41,728	99,869
Owner Occupied Housing Units	67.3%	64.0%	67.5%
Renter Occupied Housing Units	26.1%	32.1%	29.1%
Vacant Housing Units	6.5%	3.9%	3.4%
2021 Housing Units	5,474	44,043	104,214
Owner Occupied Housing Units	66.8%	63.9%	67.2%
Renter Occupied Housing Units	26.6%	32.3%	29.5%
Vacant Housing Units	6.7%	3.7%	3.3%
Median Household Income			
2016	$101,834	$110,850	$115,675
2021	$112,675	$119,072	$124,169
Median Home Value			
2016	$508,920	$513,798	$544,598
2021	$526,580	$520,937	$551,192
Per Capita Income			
2016	$46,819	$52,268	$56,095
2021	$51,240	$56,168	$60,363
Median Age			
2010	37.8	35.9	37.5
2016	38.5	36.9	38.4
2021	39.3	37.6	39.2

Data Note: Household population includes persons not residing in group quarters. Average Household Size is the household population divided by total households. Persons in families include the householder and persons related to the householder by birth, marriage, or adoption. Per Capita Income represents the income received by all persons aged 15 years and over divided by the total population.
Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2016 and 2021 Esri converted Census 2000 data into 2010 geography.

August 19, 2016

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10430 Main St, Fairfax, Virginia, 22030
Rings: 1, 3, 5 mile radii

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Latitude: 38.84624
Longitude: -77.30655

	1 mile	3 miles	5 miles
2016 Households by Income			
Household Income Base	4,768	40,121	96,463
<$15,000	4.3%	3.9%	3.4%
$15,000 - $24,999	4.3%	2.9%	2.7%
$25,000 - $34,999	3.8%	3.4%	2.9%
$35,000 - $49,999	8.1%	5.5%	5.5%
$50,000 - $74,999	14.7%	13.1%	12.4%
$75,000 - $99,999	13.7%	13.8%	12.8%
$100,000 - $149,999	19.8%	23.9%	24.4%
$150,000 - $199,999	11.3%	13.8%	14.6%
$200,000+	19.9%	19.7%	21.3%
Average Household Income	$135,697	$144,359	$153,324
2021 Households by Income			
Household Income Base	5,109	42,392	100,772
<$15,000	4.2%	3.9%	3.4%
$15,000 - $24,999	4.0%	2.8%	2.5%
$25,000 - $34,999	3.2%	2.7%	2.4%
$35,000 - $49,999	8.6%	5.9%	5.8%
$50,000 - $74,999	9.0%	8.5%	7.7%
$75,000 - $99,999	13.4%	13.4%	12.4%
$100,000 - $149,999	22.0%	25.9%	26.4%
$150,000 - $199,999	13.5%	15.9%	16.7%
$200,000+	22.1%	21.0%	22.7%
Average Household Income	$148,789	$155,543	$165,042
2016 Owner Occupied Housing Units by Value			
Total	3,435	26,712	67,378
<$50,000	2.5%	1.5%	1.3%
$50,000 - $99,999	0.7%	0.7%	0.8%
$100,000 - $149,999	0.9%	1.3%	1.3%
$150,000 - $199,999	2.3%	1.4%	1.4%
$200,000 - $249,999	2.5%	2.7%	2.7%
$250,000 - $299,999	3.1%	4.6%	4.2%
$300,000 - $399,999	16.4%	12.9%	12.9%
$400,000 - $499,999	20.5%	23.1%	19.2%
$500,000 - $749,999	31.8%	32.6%	34.3%
$750,000 - $999,999	15.7%	14.8%	16.4%
$1,000,000 +	3.6%	4.4%	5.5%
Average Home Value	$551,215	$561,131	$580,324
2021 Owner Occupied Housing Units by Value			
Total	3,654	28,139	70,042
<$50,000	1.8%	1.0%	0.9%
$50,000 - $99,999	0.9%	0.9%	1.1%
$100,000 - $149,999	1.0%	1.8%	1.7%
$150,000 - $199,999	1.1%	0.7%	0.7%
$200,000 - $249,999	0.5%	0.7%	0.9%
$250,000 - $299,999	1.5%	2.2%	2.1%
$300,000 - $399,999	13.6%	11.0%	11.3%
$400,000 - $499,999	26.0%	28.9%	24.2%
$500,000 - $749,999	33.3%	32.8%	34.5%
$750,000 - $999,999	16.7%	15.5%	17.2%
$1,000,000 +	3.5%	4.4%	5.4%
Average Home Value	$572,714	$576,829	$594,049

Data Note: Income represents the preceding year, expressed in current dollars. Household income includes wage and salary earnings, interest dividends, net rents, pensions, SSI and welfare payments, child support, and alimony.
Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2016 and 2021 Esri converted Census 2000 data into 2010 geography.

August 19, 2016

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Rings: 1, 3, 5 mile radii

Prepared by Esri
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	1 mile	3 miles	5 miles
2010 Population by Age			
Total	13,333	107,571	254,765
0 - 4	4.6%	5.6%	5.8%
5 - 9	4.6%	5.7%	6.2%
10 - 14	4.9%	6.0%	6.5%
15 - 24	17.4%	16.9%	13.8%
25 - 34	14.8%	14.7%	14.3%
35 - 44	13.4%	13.8%	14.3%
45 - 54	14.6%	15.1%	15.9%
55 - 64	12.1%	11.7%	12.5%
65 - 74	7.0%	6.1%	6.4%
75 - 84	4.2%	3.1%	3.1%
85 +	2.4%	1.3%	1.2%
18 +	82.4%	78.9%	77.4%
2016 Population by Age			
Total	14,486	114,212	267,789
0 - 4	4.4%	5.0%	5.2%
5 - 9	4.7%	5.6%	6.0%
10 - 14	4.9%	5.8%	6.5%
15 - 24	15.3%	16.1%	13.4%
25 - 34	16.1%	14.9%	14.3%
35 - 44	13.1%	13.1%	13.4%
45 - 54	13.7%	13.7%	14.4%
55 - 64	12.7%	12.6%	13.4%
65 - 74	8.4%	8.0%	8.4%
75 - 84	4.3%	3.6%	3.6%
85 +	2.5%	1.4%	1.3%
18 +	82.8%	80.0%	78.6%
2021 Population by Age			
Total	15,416	120,510	279,363
0 - 4	4.4%	5.0%	5.2%
5 - 9	4.6%	5.2%	5.5%
10 - 14	4.9%	5.5%	5.9%
15 - 24	14.2%	15.0%	12.5%
25 - 34	15.4%	15.5%	14.8%
35 - 44	14.5%	13.5%	13.9%
45 - 54	12.8%	12.6%	13.3%
55 - 64	12.9%	12.7%	13.3%
65 - 74	9.2%	9.0%	9.7%
75 - 84	4.8%	4.3%	4.4%
85 +	2.5%	1.6%	1.5%
18 +	83.2%	81.1%	79.9%
2010 Population by Sex			
Males	7,085	53,284	125,782
Females	6,249	54,284	128,986
2016 Population by Sex			
Males	7,737	56,787	132,668
Females	6,750	57,427	135,121
2021 Population by Sex			
Males	8,239	60,048	138,732
Females	7,175	60,462	140,631

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2016 and 2021 Esri converted Census 2000 data into 2010 geography.

August 19, 2016

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Market Profile

Fairfax 1,3,5
10430 Main St, Fairfax, Virginia, 22030
Rings: 1, 3, 5 mile radii

Prepared by Esri
Latitude: 38.84624
Longitude: -77.30655

	1 mile	3 miles	5 miles
2010 Population by Race/Ethnicity			
Total	13,335	107,567	254,767
White Alone	70.3%	66.4%	67.4%
Black Alone	7.8%	6.3%	5.5%
American Indian Alone	0.5%	0.3%	0.3%
Asian Alone	12.1%	19.3%	19.2%
Pacific Islander Alone	0.1%	0.1%	0.1%
Some Other Race Alone	5.7%	3.8%	3.7%
Two or More Races	3.5%	3.9%	3.8%
Hispanic Origin	16.5%	11.6%	11.5%
Diversity Index	62.7	61.8	60.6
2016 Population by Race/Ethnicity			
Total	14,487	114,213	267,788
White Alone	66.3%	62.1%	63.1%
Black Alone	8.3%	6.7%	5.9%
American Indian Alone	0.6%	0.3%	0.3%
Asian Alone	14.4%	22.1%	22.1%
Pacific Islander Alone	0.1%	0.1%	0.1%
Some Other Race Alone	6.3%	4.2%	4.2%
Two or More Races	4.0%	4.5%	4.4%
Hispanic Origin	18.4%	13.1%	13.1%
Diversity Index	67.3	66.1	65.2
2021 Population by Race/Ethnicity			
Total	15,415	120,510	279,362
White Alone	63.5%	58.5%	59.5%
Black Alone	8.4%	6.9%	6.1%
American Indian Alone	0.6%	0.4%	0.3%
Asian Alone	16.3%	24.7%	24.5%
Pacific Islander Alone	0.1%	0.1%	0.1%
Some Other Race Alone	6.7%	4.6%	4.6%
Two or More Races	4.3%	4.9%	4.8%
Hispanic Origin	19.7%	14.4%	14.5%
Diversity Index	70.2	69.3	68.5
2010 Population by Relationship and Household Type			
Total	13,334	107,568	254,768
In Households	84.7%	93.6%	97.1%
In Family Households	68.6%	77.9%	82.8%
Householder	21.3%	24.2%	25.7%
Spouse	17.2%	19.9%	21.4%
Child	22.9%	27.2%	29.2%
Other relative	4.4%	4.5%	4.5%
Nonrelative	2.8%	2.1%	2.1%
In Nonfamily Households	16.1%	15.7%	14.4%
In Group Quarters	15.3%	6.4%	2.9%
Institutionalized Population	11.7%	1.6%	0.8%
Noninstitutionalized Population	3.6%	4.8%	2.1%

Data Note: Persons of Hispanic Origin may be of any race. The Diversity Index measures the probability that two people from the same area will be from different race/ethnic groups.
Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2016 and 2021 Esri converted Census 2000 data into 2010 geography.

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Market Profile

Fairfax 1,3,5
10430 Main St, Fairfax, Virginia, 22030
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	1 mile	3 miles	5 miles
2016 Population 25+ by Educational Attainment			
Total	10,249	76,944	184,430
Less than 9th Grade	4.3%	3.2%	2.9%
9th - 12th Grade, No Diploma	6.5%	2.6%	2.4%
High School Graduate	13.7%	10.3%	9.8%
GED/Alternative Credential	2.6%	1.2%	1.0%
Some College, No Degree	17.2%	14.4%	13.4%
Associate Degree	5.2%	5.2%	4.9%
Bachelor's Degree	26.8%	30.5%	32.9%
Graduate/Professional Degree	23.7%	32.6%	32.9%
2016 Population 15+ by Marital Status			
Total	12,459	95,364	220,445
Never Married	38.2%	36.3%	32.3%
Married	46.1%	51.7%	55.9%
Widowed	6.1%	4.0%	3.9%
Divorced	9.6%	8.0%	7.8%
2016 Civilian Population 16+ in Labor Force			
Civilian Employed	95.8%	96.5%	97.0%
Civilian Unemployed	4.2%	3.5%	3.0%
2016 Employed Population 16+ by Industry			
Total	6,887	62,152	148,298
Agriculture/Mining	0.1%	0.1%	0.1%
Construction	8.8%	4.5%	4.1%
Manufacturing	1.7%	3.2%	3.2%
Wholesale Trade	2.0%	1.4%	1.3%
Retail Trade	9.0%	8.2%	7.3%
Transportation/Utilities	2.0%	2.5%	2.7%
Information	1.7%	2.1%	2.5%
Finance/Insurance/Real Estate	6.7%	6.1%	6.9%
Services	57.0%	59.2%	59.4%
Public Administration	10.9%	12.6%	12.4%
2016 Employed Population 16+ by Occupation			
Total	6,885	62,152	148,294
White Collar	71.3%	77.2%	78.9%
Management/Business/Financial	21.4%	23.9%	26.1%
Professional	29.5%	33.5%	33.8%
Sales	8.8%	8.9%	8.6%
Administrative Support	11.6%	10.8%	10.4%
Services	16.8%	14.7%	13.4%
Blue Collar	11.8%	8.1%	7.8%
Farming/Forestry/Fishing	0.1%	0.1%	0.0%
Construction/Extraction	6.8%	3.1%	2.4%
Installation/Maintenance/Repair	1.4%	1.4%	1.5%
Production	2.1%	1.4%	1.4%
Transportation/Material Moving	1.4%	2.2%	2.4%
2010 Population By Urban/ Rural Status			
Total Population	13,334	107,568	254,768
Population Inside Urbanized Area	100.0%	100.0%	99.8%
Population Inside Urbanized Cluster	0.0%	0.0%	0.0%
Rural Population	0.0%	0.0%	0.2%

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2016 and 2021 Esri converted Census 2000 data into 2010 geography.

August 19, 2016

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Rings: 1, 3, 5 mile radii

Prepared by Esri
Latitude: 38.84624
Longitude: -77.30655

	1 mile	3 miles	5 miles
2010 Households by Type			
Total	4,394	37,971	91,685
Households with 1 Person	23.3%	22.4%	21.2%
Households with 2+ People	76.7%	77.6%	78.8%
Family Households	66.8%	69.0%	71.3%
Husband-wife Families	53.7%	56.8%	59.4%
With Related Children	23.3%	27.0%	28.6%
Other Family (No Spouse Present)	13.2%	12.2%	11.9%
Other Family with Male Householder	3.4%	3.5%	3.4%
With Related Children	1.2%	1.5%	1.5%
Other Family with Female Householder	9.7%	8.7%	8.4%
With Related Children	5.3%	4.7%	4.6%
Nonfamily Households	9.9%	8.7%	7.5%
All Households with Children	30.1%	33.5%	35.0%
Multigenerational Households	3.3%	3.2%	3.4%
Unmarried Partner Households	4.5%	4.3%	4.0%
Male-female	3.5%	3.6%	3.4%
Same-sex	1.0%	0.7%	0.7%
2010 Households by Size			
Total	4,397	37,971	91,684
1 Person Household	23.3%	22.4%	21.2%
2 Person Household	34.0%	33.0%	33.1%
3 Person Household	16.9%	18.0%	18.2%
4 Person Household	14.2%	16.0%	16.6%
5 Person Household	6.9%	6.5%	6.9%
6 Person Household	2.6%	2.4%	2.5%
7 + Person Household	2.0%	1.6%	1.6%
2010 Households by Tenure and Mortgage Status			
Total	4,395	37,972	91,684
Owner Occupied	74.0%	68.3%	71.9%
Owned with a Mortgage/Loan	58.1%	56.5%	60.2%
Owned Free and Clear	15.9%	11.8%	11.7%
Renter Occupied	26.0%	31.7%	28.1%
2010 Housing Units By Urban/ Rural Status			
Total Housing Units	4,706	39,579	95,044
Housing Units Inside Urbanized Area	100.0%	100.0%	99.8%
Housing Units Inside Urbanized Cluster	0.0%	0.0%	0.0%
Rural Housing Units	0.0%	0.0%	0.2%

Data Note: Households with children include any households with people under age 18, related or not. Multigenerational households are families with 3 or more parent-child relationships. Unmarried partner households are usually classified as nonfamily households unless there is another member of the household related to the householder. Multigenerational and unmarried partner households are reported only to the tract level. Esri estimated block group data, which is used to estimate polygons or non-standard geography.
Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2016 and 2021 Esri converted Census 2000 data into 2010 geography.

August 19, 2016

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Market Profile

Fairfax 1,3,5
10430 Main St, Fairfax, Virginia, 22030
Rings: 1, 3, 5 mile radii

Prepared by Esri
Latitude: 38.84624
Longitude: -77.30655

		1 mile	3 miles	5 miles
Top 3 Tapestry Segments				
	1.	Urban Chic (2A)	Enterprising Professionals	Top Tier (1A)
	2.	City Lights (8A)	Top Tier (1A)	Enterprising Professionals
	3.	Exurbanites (1E)	Savvy Suburbanites (1D)	Savvy Suburbanites (1D)
2016 Consumer Spending				
Apparel & Services: Total $		$16,664,731	$150,971,655	$383,179,492
Average Spent		$3,495.12	$3,762.91	$3,972.29
Spending Potential Index		174	187	197
Education: Total $		$13,366,976	$119,986,386	$313,261,387
Average Spent		$2,803.48	$2,990.61	$3,247.48
Spending Potential Index		198	211	230
Entertainment/Recreation: Total $		$23,956,317	$213,608,299	$543,046,348
Average Spent		$5,024.40	$5,324.10	$5,629.58
Spending Potential Index		172	183	193
Food at Home: Total $		$38,354,927	$346,686,040	$874,125,332
Average Spent		$8,044.24	$8,641.01	$9,061.77
Spending Potential Index		161	173	182
Food Away from Home: Total $		$24,845,800	$227,700,858	$576,759,109
Average Spent		$5,210.95	$5,675.35	$5,979.07
Spending Potential Index		168	184	193
Health Care: Total $		$41,680,953	$364,964,978	$927,655,934
Average Spent		$8,741.81	$9,096.61	$9,616.70
Spending Potential Index		165	172	182
HH Furnishings & Equipment: Total $		$14,630,548	$131,061,925	$333,184,052
Average Spent		$3,068.49	$3,266.67	$3,454.01
Spending Potential Index		174	185	196
Personal Care Products & Services: Total $		$6,121,269	$54,537,180	$138,394,071
Average Spent		$1,283.82	$1,359.32	$1,434.69
Spending Potential Index		175	186	196
Shelter: Total $		$133,574,784	$1,192,462,715	$3,025,726,628
Average Spent		$28,014.85	$29,721.66	$31,366.71
Spending Potential Index		180	191	201
Support Payments/Cash Contributions/Gifts in Kind: Total $		$18,898,106	$166,547,544	$426,985,483
Average Spent		$3,963.53	$4,151.13	$4,426.42
Spending Potential Index		171	179	191
Travel: Total $		$17,002,656	$148,554,901	$381,972,799
Average Spent		$3,565.99	$3,702.67	$3,959.79
Spending Potential Index		192	199	213
Vehicle Maintenance & Repairs: Total $		$8,230,256	$73,472,857	$186,341,719
Average Spent		$1,726.14	$1,831.28	$1,931.74
Spending Potential Index		167	177	187

Data Note: Consumer spending shows the amount spent on a variety of goods and services by households that reside in the area. Expenditures are shown by broad budget categories that are not mutually exclusive. Consumer spending does not equal business revenue. Total and Average Amount Spent Per Household represent annual figures. The Spending Potential Index represents the amount spent in the area relative to a national average of 100.
Source: Consumer Spending data are derived from the 2013 and 2014 Consumer Expenditure Surveys, Bureau of Labor Statistics. Esri.
Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2016 and 2021 Esri converted Census 2000 data into 2010 geography.

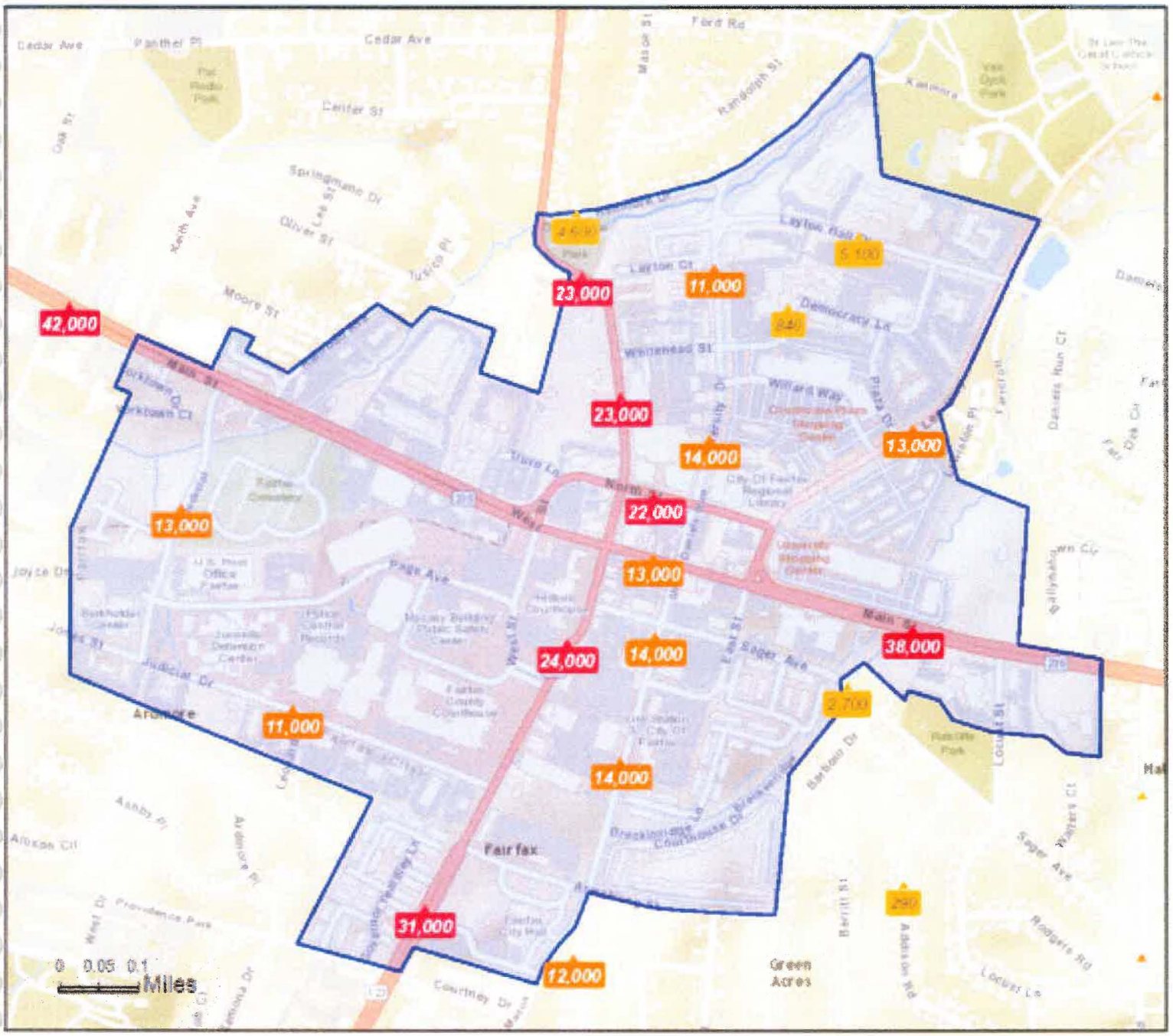
August 19, 2016

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Traffic Count Map

Old Town Fairfax
Area: 0.52 square miles

Prepared by Esri





Average Daily Traffic Volume

- Up to 6,000 vehicles per day
- 6,001 - 15,000
- 15,001 - 30,000
- 30,001 - 50,000
- 50,001 - 100,000
- More than 100,000 per day



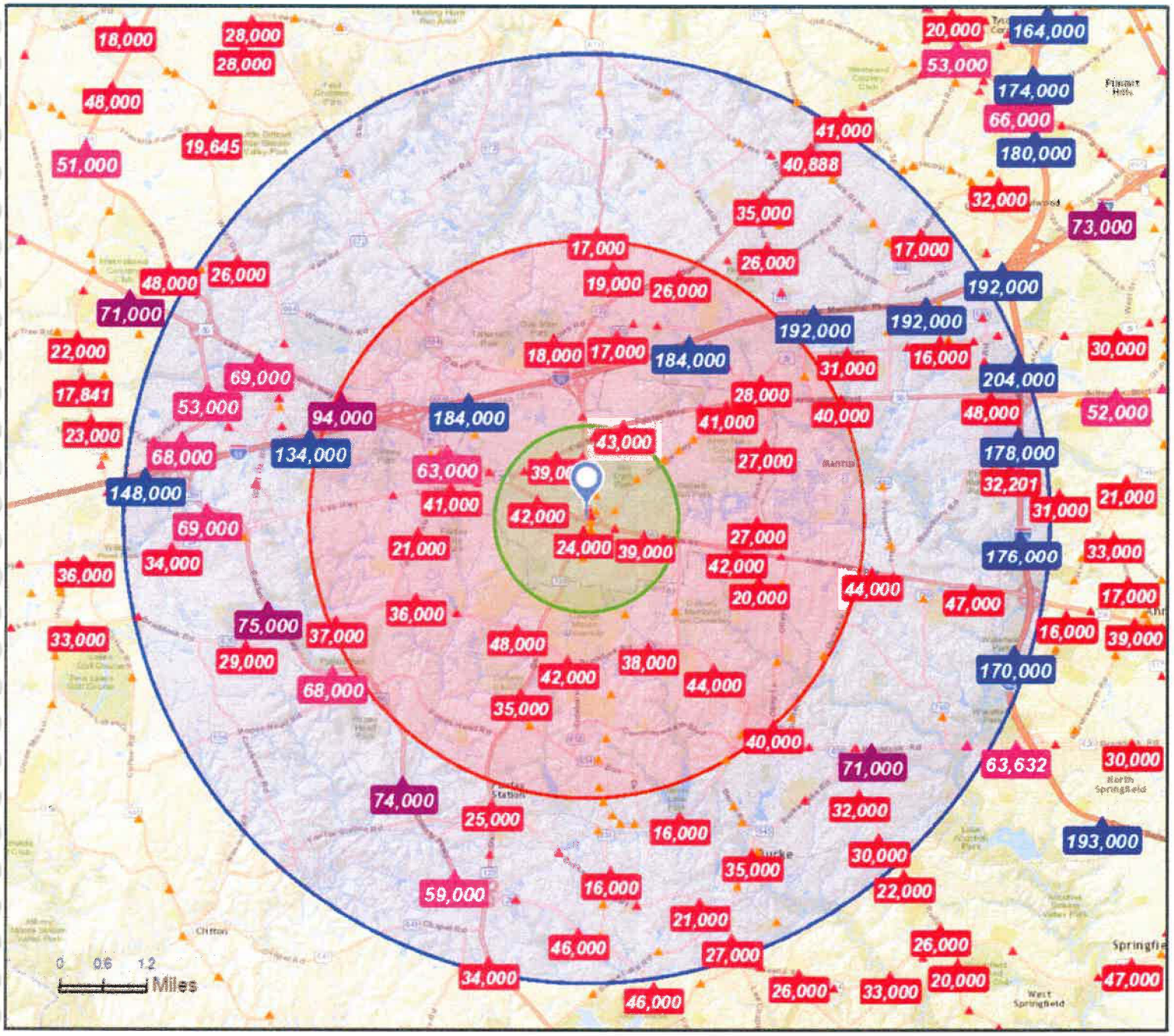
Source: ©2016 Kalibrate Technologies

September 01, 2016

Traffic Count Map

Fairfax 1,3,5
10430 Main St, Fairfax, Virginia, 22030
Rings: 1, 3, 5 mile radii

Prepared by Esri





Average Daily Traffic Volume

- ***Up to 6,000 vehicles per day***
- ***6,001 - 15,000***
- ***15,001 - 30,000***
- ***30,001 - 50,000***
- ***50,001 - 100,000***
- ***More than 100,000 per day***



Source: ©2016 Kalibrate Technologies

August 19, 2016

Business Summary

Fairfax 1,3,5
10430 Main St, Fairfax, Virginia, 22030
Rings: 1, 3, 5 mile radii

Prepared by Esri
Latitude: 38.84624
Longitude: -77.30655

Data for all businesses in area	1 mile	3 miles	5 miles
Total Businesses:	1,964	5,287	10,836
Total Employees:	31,564	89,653	190,760
Total Residential Population:	14,487	114,214	267,789
Employee/Residential Population Ratio:	2.18:1	0.78:1	0.71:1

	Businesses		Employees		Businesses		Employees		Businesses		Employees	
by SIC Codes	**Number**	**Percent**	**Number**	**Percent**	**Number**	**Percent**	**Number**	**Percent**	**Number**	**Percent**	**Number**	**Percent**
Agriculture & Mining	17	0.9%	102	0.3%	66	1.2%	674	0.8%	154	1.4%	2,257	1.2%
Construction	83	4.2%	1,065	3.4%	339	6.4%	4,203	4.7%	747	6.9%	7,790	4.1%
Manufacturing	26	1.3%	326	1.0%	80	1.5%	1,015	1.1%	167	1.5%	2,979	1.6%
Transportation	20	1.0%	558	1.8%	83	1.6%	1,374	1.5%	180	1.7%	2,269	1.2%
Communication	19	1.0%	123	0.4%	50	0.9%	5,341	6.0%	97	0.9%	6,831	3.6%
Utility	0	0.0%	0	0.0%	7	0.1%	55	0.1%	20	0.2%	246	0.1%
Wholesale Trade	23	1.2%	181	0.6%	87	1.6%	690	0.8%	206	1.9%	1,947	1.0%
Retail Trade Summary	239	12.2%	3,254	10.3%	843	15.9%	13,202	14.7%	1,886	17.4%	35,405	18.6%
Home Improvement	8	0.4%	164	0.5%	38	0.7%	545	0.6%	81	0.7%	1,596	0.8%
General Merchandise Stores	3	0.2%	57	0.2%	19	0.4%	925	1.0%	51	0.5%	3,796	2.0%
Food Stores	18	0.9%	279	0.9%	72	1.4%	1,886	2.1%	154	1.4%	3,966	2.1%
Auto Dealers, Gas Stations, Auto Aftermarket	25	1.3%	525	1.7%	86	1.6%	1,912	2.1%	154	1.4%	6,174	3.2%
Apparel & Accessory Stores	13	0.7%	62	0.2%	47	0.9%	347	0.4%	147	1.4%	1,566	0.8%
Furniture & Home Furnishings	37	1.9%	391	1.2%	143	2.7%	1,377	1.5%	299	2.8%	3,505	1.8%
Eating & Drinking Places	84	4.3%	1,498	4.7%	258	4.9%	4,834	5.4%	563	5.2%	10,568	5.5%
Miscellaneous Retail	50	2.5%	277	0.9%	180	3.4%	1,374	1.5%	437	4.0%	4,235	2.2%
Finance, Insurance, Real Estate Summary	264	13.4%	1,747	5.5%	724	13.7%	5,435	6.1%	1,330	12.3%	10,407	5.5%
Banks, Savings & Lending Institutions	66	3.4%	521	1.7%	207	3.9%	1,707	1.9%	425	3.9%	2,864	1.5%
Securities Brokers	30	1.5%	209	0.7%	74	1.4%	398	0.4%	141	1.3%	778	0.4%
Insurance Carriers & Agents	72	3.7%	438	1.4%	157	3.0%	897	1.0%	228	2.1%	1,367	0.7%
Real Estate, Holding, Other Investment Offices	95	4.8%	579	1.8%	286	5.4%	2,433	2.7%	535	4.9%	5,398	2.8%
Services Summary	1,043	53.1%	20,219	64.1%	2,503	47.3%	48,144	53.7%	5,037	46.5%	105,202	55.1%
Hotels & Lodging	9	0.5%	153	0.5%	22	0.4%	435	0.5%	40	0.4%	1,356	0.7%
Automotive Services	18	0.9%	140	0.4%	107	2.0%	824	0.9%	182	1.7%	1,406	0.7%
Motion Pictures & Amusements	33	1.7%	288	0.9%	140	2.6%	2,092	2.3%	314	2.9%	4,063	2.1%
Health Services	149	7.6%	1,999	6.3%	325	6.1%	4,008	4.5%	899	8.3%	25,871	13.6%
Legal Services	253	12.9%	1,382	4.4%	334	6.3%	2,972	3.3%	414	3.8%	3,895	2.0%
Education Institutions & Libraries	74	3.8%	11,059	35.0%	157	3.0%	15,788	17.6%	285	2.6%	19,979	10.5%
Other Services	507	25.8%	5,198	16.5%	1,418	26.8%	22,025	24.6%	2,902	26.8%	48,633	25.5%
Government	99	5.0%	3,799	12.0%	180	3.4%	8,990	10.0%	272	2.5%	14,070	7.4%
Unclassified Establishments	132	6.7%	191	0.6%	326	6.2%	529	0.6%	740	6.8%	1,358	0.7%
Totals	1,964	100.0%	31,564	100.0%	5,287	100.0%	89,653	100.0%	10,836	100.0%	190,760	100.0%

Source: Copyright 2016 Infogroup, Inc. All rights reserved. Esri Total Residential Population forecasts for 2016.

August 19, 2016

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Business Summary

Fairfax 1,3,5
10430 Main St, Fairfax, Virginia, 22030
Rings: 1, 3, 5 mile radii

Prepared by Esri
Latitude: 38.84624
Longitude: -77.30655

	Businesses		Employees		Businesses		Employees		Businesses		Employees	
by NAICS Codes	**Number**	**Percent**	**Number**	**Percent**	**Number**	**Percent**	**Number**	**Percent**	**Number**	**Percent**	**Number**	**Percent**
Agriculture, Forestry, Fishing & Hunting	0	0.0%	1	0.0%	2	0.0%	8	0.0%	8	0.1%	26	0.0%
Mining	0	0.0%	0	0.0%	0	0.0%	0	0.0%	2	0.0%	15	0.0%
Utilities	0	0.0%	0	0.0%	2	0.0%	23	0.0%	5	0.0%	139	0.1%
Construction	90	4.6%	1,090	3.5%	373	7.1%	4,496	5.0%	813	7.5%	8,592	4.5%
Manufacturing	25	1.3%	249	0.8%	76	1.4%	902	1.0%	177	1.6%	2,814	1.5%
Wholesale Trade	22	1.1%	180	0.6%	79	1.5%	662	0.7%	195	1.8%	1,903	1.0%
Retail Trade	149	7.6%	1,700	5.4%	567	10.7%	8,210	9.2%	1,272	11.7%	24,433	12.8%
Motor Vehicle & Parts Dealers	18	0.9%	490	1.6%	57	1.1%	1,742	1.9%	87	0.8%	2,174	1.1%
Furniture & Home Furnishings Stores	7	0.4%	79	0.3%	49	0.9%	368	0.4%	97	0.9%	772	0.4%
Electronics & Appliance Stores	29	1.5%	302	1.0%	90	1.7%	993	1.1%	185	1.7%	2,653	1.4%
Bldg Material & Garden Equipment & Supplies Dealers	8	0.4%	164	0.5%	38	0.7%	545	0.6%	80	0.7%	1,592	0.8%
Food & Beverage Stores	12	0.6%	212	0.7%	58	1.1%	1,756	2.0%	115	1.1%	3,633	1.9%
Health & Personal Care Stores	17	0.9%	104	0.3%	55	1.0%	445	0.5%	138	1.3%	1,126	0.6%
Gasoline Stations	7	0.4%	35	0.1%	29	0.5%	170	0.2%	67	0.6%	4,000	2.1%
Clothing & Clothing Accessories Stores	18	0.9%	79	0.3%	58	1.1%	387	0.4%	188	1.7%	1,796	0.9%
Sport Goods, Hobby, Book, & Music Stores	9	0.5%	45	0.1%	34	0.6%	398	0.4%	81	0.7%	1,390	0.7%
General Merchandise Stores	3	0.2%	57	0.2%	19	0.4%	925	1.0%	51	0.5%	3,796	2.0%
Miscellaneous Store Retailers	16	0.8%	106	0.3%	65	1.2%	406	0.5%	153	1.4%	1,181	0.6%
Nonstore Retailers	5	0.3%	26	0.1%	15	0.3%	73	0.1%	31	0.3%	321	0.2%
Transportation & Warehousing	12	0.6%	113	0.4%	62	1.2%	708	0.8%	134	1.2%	1,561	0.8%
Information	49	2.5%	790	2.5%	129	2.4%	6,467	7.2%	235	2.2%	9,120	4.8%
Finance & Insurance	170	8.7%	1,170	3.7%	443	8.4%	3,038	3.4%	801	7.4%	5,047	2.6%
Central Bank/Credit Intermediation & Related Activities	66	3.4%	521	1.7%	209	4.0%	1,734	1.9%	427	3.9%	2,891	1.5%
Securities, Commodity Contracts & Other Financial	32	1.6%	211	0.7%	77	1.5%	407	0.5%	145	1.3%	789	0.4%
Insurance Carriers & Related Activities; Funds, Trusts &	72	3.7%	438	1.4%	157	3.0%	897	1.0%	228	2.1%	1,367	0.7%
Real Estate, Rental & Leasing	71	3.6%	415	1.3%	280	5.3%	2,345	2.6%	554	5.1%	5,172	2.7%
Professional, Scientific & Tech Services	485	24.7%	3,691	11.7%	977	18.5%	13,728	15.3%	1,730	16.0%	33,840	17.7%
Legal Services	283	14.4%	1,545	4.9%	378	7.1%	3,226	3.6%	473	4.4%	4,268	2.2%
Management of Companies & Enterprises	2	0.1%	6	0.0%	6	0.1%	17	0.0%	8	0.1%	26	0.0%
Administrative & Support & Waste Management & Remediation	74	3.8%	1,247	4.0%	242	4.6%	6,825	7.6%	494	4.6%	9,210	4.8%
Educational Services	79	4.0%	10,981	34.8%	187	3.5%	15,810	17.6%	362	3.3%	20,283	10.6%
Health Care & Social Assistance	195	9.9%	2,789	8.8%	434	8.2%	5,676	6.3%	1,110	10.2%	29,193	15.3%
Arts, Entertainment & Recreation	28	1.4%	279	0.9%	92	1.7%	1,931	2.2%	203	1.9%	3,516	1.8%
Accommodation & Food Services	97	4.9%	1,696	5.4%	289	5.5%	5,358	6.0%	621	5.7%	12,094	6.3%
Accommodation	9	0.5%	153	0.5%	22	0.4%	435	0.5%	40	0.4%	1,356	0.7%
Food Services & Drinking Places	88	4.5%	1,544	4.9%	267	5.1%	4,923	5.5%	581	5.4%	10,739	5.6%
Other Services (except Public Administration)	185	9.4%	1,178	3.7%	545	10.3%	3,932	4.4%	1,101	10.2%	8,340	4.4%
Automotive Repair & Maintenance	13	0.7%	115	0.4%	78	1.5%	559	0.6%	134	1.2%	1,017	0.5%
Public Administration	99	5.0%	3,799	12.0%	180	3.4%	8,990	10.0%	273	2.5%	14,082	7.4%
Unclassified Establishments	132	6.7%	189	0.6%	325	6.1%	525	0.6%	739	6.8%	1,354	0.7%
Total	1,964	100.0%	31,564	100.0%	5,287	100.0%	89,653	100.0%	10,836	100.0%	190,760	100.0%

Source: Copyright 2016 Infogroup, Inc. All rights reserved. Esri Total Residential Population forecasts for 2016.

August 19, 2016

Pets and Products Market Potential

Fairfax 1,3,5
10430 Main St, Fairfax, Virginia, 22030
Ring: 1 mile radius

Prepared by Esri
Latitude: 38.84624
Longitude: -77.30655

Demographic Summary	2016	2021
Population	14,487	15,415
Population 18+	12,001	12,824
Households	4,768	5,109
Median Household Income	$101,834	$112,675

Product/Consumer Behavior	Expected Number of Households	Percent	MPI
HH owns any pet	2,506	52.6%	98
HH owns any bird	126	2.6%	101
HH owns any cat	1,006	21.1%	94
HH owns any dog	1,732	36.3%	89
HH owns 1 cat	567	11.9%	98
HH owns 2+ cats	440	9.2%	88
HH owns 1 dog	1,196	25.1%	102
HH owns 2+ dogs	536	11.2%	69
HH used canned/wet cat food in last 6 months	613	12.9%	109
HH used packaged dry cat food in last 6 months	957	20.1%	94
HH used cat treats in last 6 months	574	12.0%	104
HH used cat litter in last 6 months	913	19.1%	100
HH used canned/wet dog food in last 6 months	639	13.4%	93
HH used packaged dry dog food in last 6 months	1,644	34.5%	89
HH used dog biscuits/treats in last 6 months	1,383	29.0%	92
HH used flea/tick/parasite product for cat/dog	1,559	32.7%	90
HH Bought pet food from any pet specialty store/12 mo	1,215	25.5%	125
HH Bought pet food in last 12 months: from discount store	328	6.9%	75
HH Bought pet food in last 12 months: from grocery store	1,035	21.7%	81
HH Bought pet food in last 12 months: from PETCO	510	10.7%	130
HH Bought pet food in last 12 months: from PetSmart	621	13.0%	116
HH Bought pet food in last 12 months: from wholesale club	238	5.0%	115
HH Bought pet food in last 12 months: from vet	219	4.6%	106
HH Bought flea control product from vet in last 12 mo	508	10.7%	88
HH member took pet to vet in last 12 months: 1 time	629	13.2%	98
HH member took pet to vet in last 12 months: 2 times	569	11.9%	106
HH member took pet to vet in last 12 months: 3 times	260	5.5%	100
HH member took pet to vet in last 12 months: 4 times	163	3.4%	86
HH member took pet to vet in last 12 months: 5+ times	250	5.2%	100
HH used professional pet service in last 12 months	865	18.1%	114
HH used professional pet service 3+ times last 12	536	11.2%	123
HH used professional pet service: boarding/kennel	239	5.0%	117
HH used professional pet service: grooming	661	13.9%	113
HH has pet insurance	145	3.0%	110

Data Note: An MPI (Market Potential Index) measures the relative likelihood of households in the specified trade area to exhibit certain consumer behavior or purchasing patterns compared to the U.S. An MPI of 100 represents the U.S. average.
Source: These data are based upon national propensities to use various products and services, applied to local demographic composition. Usage data were collected by GfK MRI in a nationally representative survey of U.S. households. Esri forecasts for 2016 and 2021.

August 19, 2016

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Pets and Products Market Potential

Fairfax 1,3,5
10430 Main St, Fairfax, Virginia, 22030
Ring: 3 mile radius

Prepared by Esri
Latitude: 38.84624
Longitude: -77.30655

Demographic Summary	2016	2021
Population	114,214	120,510
Population 18+	91,361	97,698
Households	40,121	42,392
Median Household Income	$110,850	$119,072

Product/Consumer Behavior	Expected Number of Households	Percent	MPI
HH owns any pet	20,562	51.2%	95
HH owns any bird	917	2.3%	88
HH owns any cat	8,399	20.9%	93
HH owns any dog	14,165	35.3%	87
HH owns 1 cat	4,715	11.8%	97
HH owns 2+ cats	3,729	9.3%	88
HH owns 1 dog	9,775	24.4%	99
HH owns 2+ dogs	4,432	11.0%	68
HH used canned/wet cat food in last 6 months	5,217	13.0%	110
HH used packaged dry cat food in last 6 months	7,887	19.7%	92
HH used cat treats in last 6 months	4,630	11.5%	99
HH used cat litter in last 6 months	7,586	18.9%	98
HH used canned/wet dog food in last 6 months	5,200	13.0%	90
HH used packaged dry dog food in last 6 months	13,543	33.8%	87
HH used dog biscuits/treats in last 6 months	11,346	28.3%	90
HH used flea/tick/parasite product for cat/dog	13,046	32.5%	90
HH Bought pet food from any pet specialty store/12 mo	10,031	25.0%	123
HH Bought pet food in last 12 months: from discount store	2,625	6.5%	71
HH Bought pet food in last 12 months: from grocery store	8,690	21.7%	81
HH Bought pet food in last 12 months: from PETCO	4,400	11.0%	133
HH Bought pet food in last 12 months: from PetSmart	5,229	13.0%	116
HH Bought pet food in last 12 months: from wholesale club	1,934	4.8%	111
HH Bought pet food in last 12 months: from vet	1,657	4.1%	95
HH Bought flea control product from vet in last 12 mo	4,423	11.0%	91
HH member took pet to vet in last 12 months: 1 time	5,187	12.9%	96
HH member took pet to vet in last 12 months: 2 times	4,881	12.2%	108
HH member took pet to vet in last 12 months: 3 times	2,265	5.6%	104
HH member took pet to vet in last 12 months: 4 times	1,291	3.2%	81
HH member took pet to vet in last 12 months: 5+ times	1,936	4.8%	92
HH used professional pet service in last 12 months	7,414	18.5%	116
HH used professional pet service 3+ times last 12	4,349	10.8%	118
HH used professional pet service: boarding/kennel	2,330	5.8%	136
HH used professional pet service: grooming	5,568	13.9%	113
HH has pet insurance	1,308	3.3%	118

Data Note: An MPI (Market Potential Index) measures the relative likelihood of households in the specified trade area to exhibit certain consumer behavior or purchasing patterns compared to the U.S. An MPI of 100 represents the U.S. average.
Source: These data are based upon national propensities to use various products and services, applied to local demographic composition. Usage data were collected by GfK MRI in a nationally representative survey of U.S. households. Esri forecasts for 2016 and 2021.

August 19, 2016

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Pets and Products Market Potential

Fairfax 1,3,5
10430 Main St, Fairfax, Virginia, 22030
Ring: 5 mile radius

Prepared by Esri
Latitude: 38.84624
Longitude: -77.30655

Demographic Summary	2016	2021
Population	267,789	279,363
Population 18+	210,465	223,175
Households	96,463	100,772
Median Household Income	$115,675	$124,169

Product/Consumer Behavior	Expected Number of Households	Percent	MPI
HH owns any pet	49,820	51.6%	96
HH owns any bird	2,197	2.3%	87
HH owns any cat	20,398	21.1%	94
HH owns any dog	34,310	35.6%	87
HH owns 1 cat	11,444	11.9%	98
HH owns 2+ cats	9,016	9.3%	89
HH owns 1 dog	23,689	24.6%	100
HH owns 2+ dogs	10,665	11.1%	68
HH used canned/wet cat food in last 6 months	12,670	13.1%	112
HH used packaged dry cat food in last 6 months	19,059	19.8%	92
HH used cat treats in last 6 months	11,068	11.5%	99
HH used cat litter in last 6 months	18,307	19.0%	99
HH used canned/wet dog food in last 6 months	12,418	12.9%	90
HH used packaged dry dog food in last 6 months	32,890	34.1%	88
HH used dog biscuits/treats in last 6 months	27,516	28.5%	91
HH used flea/tick/parasite product for cat/dog	31,803	33.0%	91
HH Bought pet food from any pet specialty store/12 mo	24,481	25.4%	125
HH Bought pet food in last 12 months: from discount store	6,329	6.6%	72
HH Bought pet food in last 12 months: from grocery store	20,958	21.7%	81
HH Bought pet food in last 12 months: from PETCO	10,708	11.1%	135
HH Bought pet food in last 12 months: from PetSmart	12,802	13.3%	118
HH Bought pet food in last 12 months: from wholesale club	4,622	4.8%	111
HH Bought pet food in last 12 months: from vet	4,131	4.3%	99
HH Bought flea control product from vet in last 12 mo	11,085	11.5%	95
HH member took pet to vet in last 12 months: 1 time	12,503	13.0%	96
HH member took pet to vet in last 12 months: 2 times	11,657	12.1%	107
HH member took pet to vet in last 12 months: 3 times	5,721	5.9%	109
HH member took pet to vet in last 12 months: 4 times	3,222	3.3%	84
HH member took pet to vet in last 12 months: 5+ times	4,822	5.0%	95
HH used professional pet service in last 12 months	17,942	18.6%	117
HH used professional pet service 3+ times last 12	10,527	10.9%	119
HH used professional pet service: boarding/kennel	5,897	6.1%	143
HH used professional pet service: grooming	13,314	13.8%	112
HH has pet insurance	3,015	3.1%	113

Data Note: An MPI (Market Potential Index) measures the relative likelihood of households in the specified trade area to exhibit certain consumer behavior or purchasing patterns compared to the U.S. An MPI of 100 represents the U.S. average.
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August 19, 2016

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Electronics and Internet Market Potential

Fairfax 1,3,5
10430 Main St, Fairfax, Virginia, 22030
Ring: 1 mile radius

Prepared by Esri
Latitude: 38.84624
Longitude: -77.30655

Demographic Summary	2016	2021
Population	14,487	15,415
Population 18+	12,001	12,824
Households	4,768	5,109
Median Household Income	$101,834	$112,675

Product/Consumer Behavior	Expected Number of Adults/HHs	Percent	MPI
Own any e-reader/tablet (such as Kindle or iPad)	4,505	37.5%	118
Own e-reader/tablet: iPad	2,476	20.6%	135
Own e-reader/tablet: Barnes & Noble Nook	422	3.5%	101
Own e-reader/tablet: Amazon Kindle	1,564	13.0%	116
Own any portable MP3 player	3,737	31.1%	101
Own Apple iPod nano	1,176	9.8%	117
Own Apple iPod shuffle	620	5.2%	118
Own Apple iPod touch	1,168	9.7%	100
Purchased portable MP3 player in last 12 months	344	2.9%	76
Own digital point & shoot camera	3,594	29.9%	103
Own digital single-lens reflex (SLR) camera	1,216	10.1%	117
Bought any camera in last 12 months	607	5.1%	89
Spent on cameras in last 12 months: $1-99	687	5.7%	66
Spent on cameras in last 12 months: $100-$199	518	4.3%	95
Spent on cameras in last 12 months: $200+	696	5.8%	112
Own telephoto/zoom lens	869	7.2%	117
Own wideangle lens	516	4.3%	121
Printed digital photos in last 12 months	301	2.5%	86
Use a computer at work	5,416	45.1%	111
Use desktop computer at work	3,003	25.0%	104
Use laptop/notebook at work	1,993	16.6%	122
HH owns a computer	4,168	87.4%	114
Purchased home computer in last 12 months	711	14.9%	113
HH owns desktop computer	2,467	51.7%	114
HH owns laptop/notebook	2,937	61.6%	114
HH owns netbook	273	5.7%	128
Child (under 18 yrs) uses home computer	905	19.0%	115
HH owns any Apple/Mac brand computer	1,136	23.8%	158
HH owns any PC/non-Apple brand computer	3,466	72.7%	107

Data Note: An MPI (Market Potential Index) measures the relative likelihood of the adults or households in the specified trade area to exhibit certain consumer behavior or purchasing patterns compared to the U.S. An MPI of 100 represents the U.S. average.
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10430 Main St, Fairfax, Virginia, 22030
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Prepared by Esri
Latitude: 38.84624
Longitude: -77.30655

Product/Consumer Behavior	Expected Number of Adults/HHs	Percent	MPI
Purchased most recent home computer 1-2 years ago	954	20.0%	110
Purchased most recent home computer 3-4 years ago	842	17.7%	112
Purchased most recent home computer 5+ years ago	427	9.0%	108
HH purchased most recent computer in a store	1,893	39.7%	106
HH purchased most recent computer online	799	16.8%	128
Spent on most recent home computer: <$500	593	12.4%	86
Spent on most recent home computer: $500-$999	961	20.2%	106
Spent on most recent home computer: $1000-$1499	621	13.0%	138
Spent on most recent home computer: $1500-$1999	317	6.6%	146
Spent on most recent home computer: $2000+	256	5.4%	137
HH owns webcam	1,037	21.7%	108
HH owns wireless router	1,900	39.8%	119
HH owns software: accounting	340	7.1%	114
HH owns software: communications/fax	326	6.8%	123
HH owns software: database/filing	330	6.9%	117
HH owns software: desktop publishing	481	10.1%	117
HH owns software: education/training	477	10.0%	114
HH owns software: entertainment/games	1,056	22.1%	105
HH owns software: personal finance/tax prep	753	15.8%	136
HH owns software: presentation graphics	424	8.9%	137
HH owns software: multimedia	673	14.1%	110
HH owns software: networking	733	15.4%	114
HH owns software: online meeting/conference	202	4.2%	134
HH owns software: security/anti-virus	1,357	28.5%	114
HH owns software: spreadsheet	1,205	25.3%	134
HH owns software: utility	304	6.4%	129
HH owns software: web authoring	116	2.4%	109
HH owns software: word processing	1,764	37.0%	126
HH owns camcorder	778	16.3%	117
HH owns CD player	908	19.0%	107
HH owns DVD/Blu-ray player	2,979	62.5%	103
HH purchased DVD/Blu-ray player in last 12 months	368	7.7%	96

Data Note: An MPI (Market Potential Index) measures the relative likelihood of the adults or households in the specified trade area to exhibit certain consumer behavior or purchasing patterns compared to the U.S. An MPI of 100 represents the U.S. average.
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Electronics and Internet Market Potential

Fairfax 1,3,5
10430 Main St, Fairfax, Virginia, 22030
Ring: 1 mile radius

Prepared by Esri
Latitude: 38.84624
Longitude: 77.30655

Product/Consumer Behavior	Expected Number of Adults/HHs	Percent	MPI
HH owns portable GPS navigation device	1,533	32.2%	117
HH purchased portable GPS navigation device/12 mo	176	3.7%	110
HH owns headphones (ear buds)	1,943	40.8%	115
HH owns noise reduction headphones	482	10.1%	129
HH owns home theater/entertainment system	563	11.8%	110
HH owns 1 TV	974	20.4%	100
HH owns 2 TVs	1,295	27.2%	105
HH owns 3 TVs	998	20.9%	98
HH owns 4+ TVs	920	19.3%	102
HH owns LCD TV	1,672	35.1%	111
HH owns LED TV	1,146	24.0%	114
HH owns plasma TV	741	15.5%	103
HH owns projection TV	110	2.3%	85
HH has 3D TV	260	5.5%	116
HH has HDTV	2,544	53.4%	114
HH has Internet connectable TV	1,032	21.6%	114
HH owns miniature screen TV (<13 in)	217	4.6%	99
HH owns regular screen TV (13-26 in)	1,361	28.5%	97
HH owns large screen TV (27-35 in)	1,748	36.7%	99
HH owns big screen TV (36-42 in)	1,784	37.4%	114
HH owns giant screen TV (over 42 in)	1,310	27.5%	106
Most recent HH TV purchase: regular screen (13-26 in)	603	12.6%	94
Most recent HH TV purchase: large screen (27-35 in)	987	20.7%	94
Most recent HH TV purchase: big screen (36-42 in)	1,244	26.1%	115
Most recent HH TV purchase: giant screen (over 42 in)	1,013	21.2%	106
HH owns Internet video device for TV	509	10.7%	151
HH purchased video game system in last 12 months	509	10.7%	134
HH owns video game system: handheld	687	14.4%	97
HH owns video game system: attached to TV/computer	2,068	43.4%	98
HH owns video game system: Nintendo 3DS	171	3.6%	101
HH owns video game system: Nintendo DS/DS Lite	293	6.1%	101
HH owns video game system: Nintendo DSi	186	3.9%	96
HH owns video game system: Nintendo Wii	1,154	24.2%	104
HH owns video game system: PlayStation 2 (PS2)	376	7.9%	81
HH owns video game system: PlayStation 3 (PS3)	626	13.1%	96
HH owns video game system: Sony PSP/PSPgo	110	2.3%	96
HH owns video game system: Xbox 360	878	18.4%	99
HH purchased 5+ video games in last 12 months	299	6.3%	102
HH spent $101+ on video games in last 12 months	420	8.8%	106
Have access to Internet at home	9,920	82.7%	101
Connection to Internet at home: via cable modem	4,708	39.2%	112
Connection to Internet at home: via DSL	1,538	12.8%	79
Connection to Internet at home: via fiber optic	2,165	18.0%	162
Access Internet at home via high speed connection	9,639	80.3%	103
Spend 10+ hrs online (excl email/IM time) daily	446	3.7%	107
Spend 5-9.9 hrs online (excl email/IM time) daily	1,341	11.2%	110
Spend 2-4.9 hrs online (excl email/IM time) daily	2,512	20.9%	102
Spend 1-1.9 hrs online (excl email/IM time) daily	2,127	17.7%	104
Spend 0.5-0.9 hrs online(excl email/IM time) daily	1,511	12.6%	100
Spend <0.5 hrs online (excl email/IM time) daily	1,044	8.7%	87
Used Internet in last 30 days	9,620	80.2%	99
Used Internet/30 days: at home	9,341	77.8%	102
Used Internet/30 days: at work	5,131	42.8%	110
Used Internet/30 days: at school/library	1,398	11.6%	94

Data Note: An MPI (Market Potential Index) measures the relative likelihood of the adults or households in the specified trade area to exhibit certain consumer behavior or purchasing patterns compared to the U.S. An MPI of 100 represents the U.S. average.
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August 19, 2016

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Electronics and Internet Market Potential

Fairfax 1,3,5
10430 Main St, Fairfax, Virginia, 22030
Ring: 1 mile radius

Prepared by Esri
Latitude: 38.84624
Longitude: -77.30655

Product/Consumer Behavior	Expected Number of Adults/HHs	Percent	MPI
Used Internet/30 days: not hm/work/school/library	3,625	30.2%	108
Accessed Internet in last 30 days using computer	9,172	76.4%	103
Accessed Internet in last 30 days using cell phone	6,747	56.2%	101
Used Wi-Fi/wireless connection outside hm/30 days	3,873	32.3%	113
Internet last 30 days: visited forum	524	4.4%	88
Internet last 30 days: used email	8,953	74.6%	105
Internet last 30 days: used IM	5,297	44.1%	91
Internet last 30 days: made personal purchase	6,046	50.4%	120
Internet last 30 days: made business purchase	1,574	13.1%	118
Internet last 30 days: paid bills online	5,698	47.5%	105
Internet last 30 days: took online class	916	7.6%	105
Internet last 30 days: looked for employment	1,674	13.9%	90
Internet last 30 days: traded/tracked investments	1,883	15.7%	135
Internet last 30 days: made travel plans	3,004	25.0%	133
Internet last 30 days: obtained auto info	1,330	11.1%	98
Internet last 30 days: obtained financial info	4,036	33.6%	112
Internet last 30 days: obtained medical info	3,301	27.5%	117
Internet last 30 days: checked movie listing/times	3,171	26.4%	113
Internet last 30 days: obtained latest news	6,146	51.2%	114
Internet last 30 days: obtained parenting info	731	6.1%	107
Internet last 30 days: obtained real estate info	1,956	16.3%	126
Internet last 30 days: obtained sports news/info	3,810	31.7%	106
Internet last 30 days: visited online blog	1,816	15.1%	120
Internet last 30 days: wrote online blog	392	3.3%	110
Internet last 30 days: used online dating website	220	1.8%	97
Internet last 30 days: played games online	2,985	24.9%	85
Internet last 30 days: sent greeting card	700	5.8%	121
Internet last 30 days: made phone call	2,312	19.3%	109
Internet last 30 days: shared photos via website	3,566	29.7%	102
Internet last 30 days: looked for recipes	4,357	36.3%	107
Internet last 30 days: added video to website	667	5.6%	87
Internet last 30 days: downloaded a movie	916	7.6%	106
Internet last 30 days: downloaded music	2,532	21.1%	92
Internet last 30 days: downloaded podcast	550	4.6%	119
Internet last 30 days: downloaded TV program	585	4.9%	102
Internet last 30 days: downloaded a video game	946	7.9%	78
Internet last 30 days: watched movie online	1,927	16.1%	100
Internet last 30 days: watched TV program online	1,986	16.5%	111
Purch/rntd video download/strm/30 days: amazon.com	545	4.5%	108
Purch/rntd video download/strm/30 days: hulu.com	422	3.5%	97
Purch/rntd video download/strm/30 days: itunes.com	364	3.0%	95
Purch/rntd video download/strm/30 days:netflix.com	1,543	12.9%	108
Used online gaming srv/30 days: PlayStation Network	462	3.8%	84
Used online gaming srv/30 days: Xbox Live	521	4.3%	78
Played Massive Multi-Player Online game/30 days	340	2.8%	79
Visited any Spanish language website last 30 days	276	2.3%	74
Visited website in last 30 days: facebook.com	6,196	51.6%	93
Visited website in last 30 days: LinkedIn.com	1,970	16.4%	157
Visited website in last 30 days: photobucket.com	202	1.7%	81
Visited website in last 30 days: picasa.com	351	2.9%	117
Visited website in last 30 days: shutterfly.com	532	4.4%	139
Visited website in last 30 days: tumblr.com	504	4.2%	119
Visited website in last 30 days: twitter.com	1,330	11.1%	98
Visited website in last 30 days: yelp.com	890	7.4%	180
Visited website in last 30 days: YouTube.com	5,303	44.2%	99

Data Note: An MPI (Market Potential Index) measures the relative likelihood of the adults or households in the specified trade area to exhibit certain consumer behavior or purchasing patterns compared to the U.S. An MPI of 100 represents the U.S. average.
Source: These data are based upon national propensities to use various products and services, applied to local demographic composition. Usage data were collected by GfK MRI in a nationally representative survey of U.S. households. Esri forecasts for 2016 and 2021.

August 19, 2016

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Ring: 1 mile radius

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Latitude: 38.84624
Longitude: -77.30655

Product/Consumer Behavior	Expected Number of Adults/HHs	Percent	MPI
Used website/search engine/30 days: ask.com	837	7.0%	95
Used website/search engine/30 days: bing.com	2,079	17.3%	101
Used website/search engine/30 days: google.com	8,962	74.7%	102
Used website/search engine/30 days: yahoo.com	3,857	32.1%	96
Visited news website in last 30 days: ABCnews.com	744	6.2%	121
Visited news website in last 30 days: CBSnews.com	471	3.9%	115
Visited news website in last 30 days: cnn.com	1,886	15.7%	131
Visited news website in last 30 days: foxnews.com	1,177	9.8%	101
Visited news website in last 30 days: msnbc.com	697	5.8%	114
Visited news website in last 30 days: Yahoo! News	1,897	15.8%	114

Data Note: An MPI (Market Potential Index) measures the relative likelihood of the adults or households in the specified trade area to exhibit certain consumer behavior or purchasing patterns compared to the U.S. An MPI of 100 represents the U.S. average.
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Demographic Summary	2016	2021
Population	114,214	120,510
Population 18+	91,361	97,698
Households	40,121	42,392
Median Household Income	$110,850	$119,072

Product/Consumer Behavior	Expected Number of Adults/HHs	Percent	MPI
Own any e-reader/tablet (such as Kindle or iPad)	41,733	45.7%	144
Own e-reader/tablet: iPad	23,648	25.9%	169
Own e-reader/tablet: Barnes & Noble Nook	3,903	4.3%	122
Own e-reader/tablet: Amazon Kindle	13,823	15.1%	134
Own any portable MP3 player	33,812	37.0%	120
Own Apple iPod nano	10,760	11.8%	141
Own Apple iPod shuffle	5,696	6.2%	143
Own Apple iPod touch	10,913	11.9%	123
Purchased portable MP3 player in last 12 months	3,338	3.7%	97
Own digital point & shoot camera	31,712	34.7%	119
Own digital single-lens reflex (SLR) camera	10,878	11.9%	138
Bought any camera in last 12 months	5,349	5.9%	103
Spent on cameras in last 12 months: $1-99	6,561	7.2%	83
Spent on cameras in last 12 months: $100-$199	3,785	4.1%	91
Spent on cameras in last 12 months: $200+	6,542	7.2%	139
Own telephoto/zoom lens	7,721	8.5%	136
Own wideangle lens	4,515	4.9%	139
Printed digital photos in last 12 months	2,626	2.9%	98
Use a computer at work	49,038	53.7%	132
Use desktop computer at work	26,567	29.1%	121
Use laptop/notebook at work	19,307	21.1%	155
HH owns a computer	35,821	89.3%	116
Purchased home computer in last 12 months	6,339	15.8%	120
HH owns desktop computer	20,582	51.3%	113
HH owns laptop/notebook	26,026	64.9%	120
HH owns netbook	2,186	5.4%	122
Child (under 18 yrs) uses home computer	7,664	19.1%	115
HH owns any Apple/Mac brand computer	10,772	26.8%	179
HH owns any PC/non-Apple brand computer	28,958	72.2%	106

Data Note: An MPI (Market Potential Index) measures the relative likelihood of the adults or households in the specified trade area to exhibit certain consumer behavior or purchasing patterns compared to the U.S. An MPI of 100 represents the U.S. average.
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Product/Consumer Behavior	Expected Number of Adults/HHs	Percent	MPI
Purchased most recent home computer 1-2 years ago	8,626	21.5%	118
Purchased most recent home computer 3-4 years ago	7,343	18.3%	116
Purchased most recent home computer 5+ years ago	3,665	9.1%	111
HH purchased most recent computer in a store	16,854	42.0%	112
HH purchased most recent computer online	7,157	17.8%	136
Spent on most recent home computer: <$500	4,841	12.1%	83
Spent on most recent home computer: $500-$999	8,704	21.7%	114
Spent on most recent home computer: $1000-$1499	5,840	14.6%	154
Spent on most recent home computer: $1500-$1999	2,811	7.0%	154
Spent on most recent home computer: $2000+	2,298	5.7%	146
HH owns webcam	9,447	23.5%	117
HH owns wireless router	16,783	41.8%	125
HH owns software: accounting	3,301	8.2%	132
HH owns software: communications/fax	2,870	7.2%	129
HH owns software: database/filing	2,941	7.3%	124
HH owns software: desktop publishing	4,379	10.9%	126
HH owns software: education/training	4,012	10.0%	114
HH owns software: entertainment/games	9,310	23.2%	110
HH owns software: personal finance/tax prep	6,652	16.6%	143
HH owns software: presentation graphics	4,041	10.1%	155
HH owns software: multimedia	6,126	15.3%	119
HH owns software: networking	6,560	16.4%	121
HH owns software: online meeting/conference	2,199	5.5%	173
HH owns software: security/anti-virus	12,405	30.9%	124
HH owns software: spreadsheet	11,236	28.0%	149
HH owns software: utility	2,752	6.9%	138
HH owns software: web authoring	1,184	3.0%	132
HH owns software: word processing	15,814	39.4%	135
HH owns camcorder	6,849	17.1%	122
HH owns CD player	7,768	19.4%	109
HH owns DVD/Blu-ray player	25,276	63.0%	104
HH purchased DVD/Blu-ray player in last 12 months	2,987	7.4%	92

Data Note: An MPI (Market Potential Index) measures the relative likelihood of the adults or households in the specified trade area to exhibit certain consumer behavior or purchasing patterns compared to the U.S. An MPI of 100 represents the U.S. average.
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Product/Consumer Behavior	Expected Number of Adults/HHs	Percent	MPI
HH owns portable GPS navigation device	13,576	33.8%	123
HH purchased portable GPS navigation device/12 mo	1,534	3.8%	114
HH owns headphones (ear buds)	17,255	43.0%	121
HH owns noise reduction headphones	4,356	10.9%	138
HH owns home theater/entertainment system	5,193	12.9%	121
HH owns 1 TV	8,436	21.0%	103
HH owns 2 TVs	10,179	25.4%	98
HH owns 3 TVs	8,559	21.3%	100
HH owns 4+ TVs	7,644	19.1%	101
HH owns LCD TV	14,773	36.8%	117
HH owns LED TV	9,492	23.7%	113
HH owns plasma TV	6,340	15.8%	104
HH owns projection TV	1,188	3.0%	110
HH has 3D TV	2,234	5.6%	118
HH has HDTV	21,756	54.2%	115
HH has Internet connectable TV	9,140	22.8%	120
HH owns miniature screen TV (<13 in)	1,741	4.3%	94
HH owns regular screen TV (13-26 in)	11,484	28.6%	98
HH owns large screen TV (27-35 in)	14,311	35.7%	96
HH owns big screen TV (36-42 in)	15,055	37.5%	114
HH owns giant screen TV (over 42 in)	11,620	29.0%	111
Most recent HH TV purchase: regular screen (13-26 in)	5,071	12.6%	94
Most recent HH TV purchase: large screen (27-35 in)	7,915	19.7%	89
Most recent HH TV purchase: big screen (36-42 in)	10,336	25.8%	113
Most recent HH TV purchase: giant screen (over 42 in)	8,912	22.2%	111
HH owns Internet video device for TV	4,415	11.0%	156
HH purchased video game system in last 12 months	3,987	9.9%	125
HH owns video game system: handheld	6,058	15.1%	101
HH owns video game system: attached to TV/computer	18,162	45.3%	102
HH owns video game system: Nintendo 3DS	1,704	4.2%	120
HH owns video game system: Nintendo DS/DS Lite	2,611	6.5%	107
HH owns video game system: Nintendo DSi	1,536	3.8%	94
HH owns video game system: Nintendo Wii	10,367	25.8%	111
HH owns video game system: PlayStation 2 (PS2)	3,178	7.9%	81
HH owns video game system: PlayStation 3 (PS3)	5,553	13.8%	101
HH owns video game system: Sony PSP/PSPgo	998	2.5%	104
HH owns video game system: Xbox 360	7,862	19.6%	105
HH purchased 5+ video games in last 12 months	2,671	6.7%	109
HH spent $101+ on video games in last 12 months	3,472	8.7%	104
Have access to Internet at home	84,623	92.6%	113
Connection to Internet at home: via cable modem	40,415	44.2%	126
Connection to Internet at home: via DSL	12,047	13.2%	81
Connection to Internet at home: via fiber optic	19,484	21.3%	191
Access Internet at home via high speed connection	82,423	90.2%	116
Spend 10+ hrs online (excl email/IM time) daily	4,020	4.4%	127
Spend 5-9.9 hrs online (excl email/IM time) daily	11,860	13.0%	128
Spend 2-4.9 hrs online (excl email/IM time) daily	22,929	25.1%	122
Spend 1-1.9 hrs online (excl email/IM time) daily	17,807	19.5%	114
Spend 0.5-0.9 hrs online(excl email/IM time) daily	12,764	14.0%	111
Spend <0.5 hrs online (excl email/IM time) daily	8,196	9.0%	89
Used Internet in last 30 days	83,057	90.9%	112
Used Internet/30 days: at home	80,790	88.4%	116
Used Internet/30 days: at work	46,624	51.0%	131
Used Internet/30 days: at school/library	12,693	13.9%	112

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Product/Consumer Behavior	Expected Number of Adults/HHs	Percent	MPI
Used Internet/30 days: not hm/work/school/library	32,325	35.4%	126
Accessed Internet in last 30 days using computer	79,250	86.7%	116
Accessed Internet in last 30 days using cell phone	60,983	66.7%	120
Used Wi-Fi/wireless connection outside hm/30 days	35,487	38.8%	136
Internet last 30 days: visited forum	4,781	5.2%	106
Internet last 30 days: used email	78,303	85.7%	121
Internet last 30 days: used IM	47,864	52.4%	108
Internet last 30 days: made personal purchase	53,944	59.0%	140
Internet last 30 days: made business purchase	14,307	15.7%	140
Internet last 30 days: paid bills online	51,380	56.2%	125
Internet last 30 days: took online class	7,901	8.6%	119
Internet last 30 days: looked for employment	14,584	16.0%	103
Internet last 30 days: traded/tracked investments	17,779	19.5%	168
Internet last 30 days: made travel plans	28,140	30.8%	164
Internet last 30 days: obtained auto info	12,213	13.4%	119
Internet last 30 days: obtained financial info	36,728	40.2%	134
Internet last 30 days: obtained medical info	28,771	31.5%	134
Internet last 30 days: checked movie listing/times	28,477	31.2%	133
Internet last 30 days: obtained latest news	55,206	60.4%	135
Internet last 30 days: obtained parenting info	6,545	7.2%	126
Internet last 30 days: obtained real estate info	18,720	20.5%	158
Internet last 30 days: obtained sports news/info	34,490	37.8%	126
Internet last 30 days: visited online blog	17,515	19.2%	152
Internet last 30 days: wrote online blog	3,642	4.0%	134
Internet last 30 days: used online dating website	2,394	2.6%	138
Internet last 30 days: played games online	25,288	27.7%	95
Internet last 30 days: sent greeting card	6,196	6.8%	140
Internet last 30 days: made phone call	20,579	22.5%	127
Internet last 30 days: shared photos via website	31,855	34.9%	120
Internet last 30 days: looked for recipes	38,050	41.6%	123
Internet last 30 days: added video to website	6,547	7.2%	112
Internet last 30 days: downloaded a movie	9,031	9.9%	138
Internet last 30 days: downloaded music	22,957	25.1%	110
Internet last 30 days: downloaded podcast	5,599	6.1%	160
Internet last 30 days: downloaded TV program	5,912	6.5%	135
Internet last 30 days: downloaded a video game	8,770	9.6%	94
Internet last 30 days: watched movie online	19,100	20.9%	131
Internet last 30 days: watched TV program online	18,075	19.8%	132
Purch/rntd video download/strm/30 days: amazon.com	4,729	5.2%	123
Purch/rntd video download/strm/30 days: hulu.com	3,798	4.2%	115
Purch/rntd video download/strm/30 days: itunes.com	3,757	4.1%	129
Purch/rntd video download/strm/30 days:netflix.com	14,691	16.1%	134
Used online gaming srv/30 days: PlayStation Network	3,886	4.3%	93
Used online gaming srv/30 days: Xbox Live	4,877	5.3%	96
Played Massive Multi-Player Online game/30 days	3,048	3.3%	93
Visited any Spanish language website last 30 days	2,028	2.2%	72
Visited website in last 30 days: facebook.com	54,449	59.6%	108
Visited website in last 30 days: LinkedIn.com	18,605	20.4%	195
Visited website in last 30 days: photobucket.com	2,064	2.3%	109
Visited website in last 30 days: picasa.com	3,371	3.7%	147
Visited website in last 30 days: shutterfly.com	5,084	5.6%	175
Visited website in last 30 days: tumblr.com	4,993	5.5%	155
Visited website in last 30 days: twitter.com	12,443	13.6%	120
Visited website in last 30 days: yelp.com	8,689	9.5%	231
Visited website in last 30 days: YouTube.com	47,425	51.9%	116

Data Note: An MPI (Market Potential Index) measures the relative likelihood of the adults or households in the specified trade area to exhibit certain consumer behavior or purchasing patterns compared to the U.S. An MPI of 100 represents the U.S. average.
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Product/Consumer Behavior	Expected Number of Adults/HHs	Percent	MPI
Used website/search engine/30 days: ask.com	6,544	7.2%	98
Used website/search engine/30 days: bing.com	18,230	20.0%	117
Used website/search engine/30 days: google.com	77,924	85.3%	116
Used website/search engine/30 days: yahoo.com	32,272	35.3%	105
Visited news website in last 30 days: ABCnews.com	6,119	6.7%	131
Visited news website in last 30 days: CBSnews.com	4,108	4.5%	131
Visited news website in last 30 days: cnn.com	18,141	19.9%	166
Visited news website in last 30 days: foxnews.com	9,821	10.7%	111
Visited news website in last 30 days: msnbc.com	6,009	6.6%	129
Visited news website in last 30 days: Yahoo! News	16,228	17.8%	128

Data Note: An MPI (Market Potential Index) measures the relative likelihood of the adults or households in the specified trade area to exhibit certain consumer behavior or purchasing patterns compared to the U.S. An MPI of 100 represents the U.S. average.
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Demographic Summary	2016	2021
Population	267,789	279,363
Population 18+	210,465	223,175
Households	96,463	100,772
Median Household Income	$115,675	$124,169

Product/Consumer Behavior	Expected Number of Adults/HHs	Percent	MPI
Own any e-reader/tablet (such as Kindle or iPad)	99,974	47.5%	150
Own e-reader/tablet: iPad	58,404	27.7%	181
Own e-reader/tablet: Barnes & Noble Nook	9,324	4.4%	127
Own e-reader/tablet: Amazon Kindle	33,373	15.9%	141
Own any portable MP3 player	79,923	38.0%	123
Own Apple iPod nano	25,775	12.2%	146
Own Apple iPod shuffle	13,855	6.6%	151
Own Apple iPod touch	25,679	12.2%	126
Purchased portable MP3 player in last 12 months	8,004	3.8%	101
Own digital point & shoot camera	76,023	36.1%	124
Own digital single-lens reflex (SLR) camera	25,850	12.3%	142
Bought any camera in last 12 months	12,292	5.8%	103
Spent on cameras in last 12 months: $1-99	15,593	7.4%	86
Spent on cameras in last 12 months: $100-$199	8,768	4.2%	92
Spent on cameras in last 12 months: $200+	15,132	7.2%	139
Own telephoto/zoom lens	18,803	8.9%	144
Own wideangle lens	10,910	5.2%	146
Printed digital photos in last 12 months	6,059	2.9%	98
Use a computer at work	114,970	54.6%	134
Use desktop computer at work	61,640	29.3%	122
Use laptop/notebook at work	46,346	22.0%	161
HH owns a computer	86,544	89.7%	117
Purchased home computer in last 12 months	15,200	15.8%	120
HH owns desktop computer	50,045	51.9%	115
HH owns laptop/notebook	62,763	65.1%	120
HH owns netbook	5,416	5.6%	126
Child (under 18 yrs) uses home computer	18,812	19.5%	118
HH owns any Apple/Mac brand computer	27,011	28.0%	186
HH owns any PC/non-Apple brand computer	69,121	71.7%	105

Data Note: An MPI (Market Potential Index) measures the relative likelihood of the adults or households in the specified trade area to exhibit certain consumer behavior or purchasing patterns compared to the U.S. An MPI of 100 represents the U.S. average.
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Product/Consumer Behavior	Expected Number of Adults/HHs	Percent	MPI
Purchased most recent home computer 1-2 years ago	20,775	21.5%	118
Purchased most recent home computer 3-4 years ago	18,023	18.7%	119
Purchased most recent home computer 5+ years ago	8,837	9.2%	111
HH purchased most recent computer in a store	40,828	42.3%	112
HH purchased most recent computer online	17,177	17.8%	136
Spent on most recent home computer: <$500	11,327	11.7%	81
Spent on most recent home computer: $500-$999	20,978	21.7%	114
Spent on most recent home computer: $1000-$1499	14,092	14.6%	154
Spent on most recent home computer: $1500-$1999	6,772	7.0%	154
Spent on most recent home computer: $2000+	5,939	6.2%	157
HH owns webcam	22,450	23.3%	116
HH owns wireless router	41,120	42.6%	127
HH owns software: accounting	8,450	8.8%	140
HH owns software: communications/fax	7,434	7.7%	139
HH owns software: database/filing	7,242	7.5%	127
HH owns software: desktop publishing	10,862	11.3%	130
HH owns software: education/training	9,685	10.0%	114
HH owns software: entertainment/games	22,258	23.1%	110
HH owns software: personal finance/tax prep	16,315	16.9%	146
HH owns software: presentation graphics	9,874	10.2%	158
HH owns software: multimedia	14,576	15.1%	118
HH owns software: networking	15,827	16.4%	122
HH owns software: online meeting/conference	4,965	5.1%	163
HH owns software: security/anti-virus	30,156	31.3%	126
HH owns software: spreadsheet	27,471	28.5%	151
HH owns software: utility	6,779	7.0%	142
HH owns software: web authoring	2,786	2.9%	129
HH owns software: word processing	38,781	40.2%	137
HH owns camcorder	16,981	17.6%	126
HH owns CD player	19,407	20.1%	113
HH owns DVD/Blu-ray player	61,275	63.5%	105
HH purchased DVD/Blu-ray player in last 12 months	7,208	7.5%	93

Data Note: An MPI (Market Potential Index) measures the relative likelihood of the adults or households in the specified trade area to exhibit certain consumer behavior or purchasing patterns compared to the U.S. An MPI of 100 represents the U.S. average.
Source: These data are based upon national propensities to use various products and services, applied to local demographic composition. Usage data were collected by GfK MRI in a nationally representative survey of U.S. households. Esri forecasts for 2016 and 2021.

August 19, 2016

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JGSC Group

Electronics and Internet Market Potential

Fairfax 1,3,5
10430 Main St, Fairfax, Virginia, 22030
Ring: 5 mile radius

Prepared by Esri
Latitude: 38.84624
Longitude: -77.30655

Product/Consumer Behavior	Expected Number of Adults/HHs	Percent	MPI
HH owns portable GPS navigation device	32,910	34.1%	124
HH purchased portable GPS navigation device/12 mo	3,767	3.9%	116
HH owns headphones (ear buds)	41,724	43.3%	122
HH owns noise reduction headphones	10,890	11.3%	144
HH owns home theater/entertainment system	12,509	13.0%	121
HH owns 1 TV	20,110	20.8%	102
HH owns 2 TVs	24,341	25.2%	97
HH owns 3 TVs	20,769	21.5%	101
HH owns 4+ TVs	18,992	19.7%	104
HH owns LCD TV	35,928	37.2%	118
HH owns LED TV	23,155	24.0%	114
HH owns plasma TV	15,298	15.9%	105
HH owns projection TV	2,825	2.9%	108
HH has 3D TV	5,530	5.7%	122
HH has HDTV	53,002	54.9%	117
HH has Internet connectable TV	22,305	23.1%	122
HH owns miniature screen TV (<13 in)	4,129	4.3%	93
HH owns regular screen TV (13-26 in)	28,294	29.3%	100
HH owns large screen TV (27-35 in)	34,728	36.0%	97
HH owns big screen TV (36-42 in)	36,431	37.8%	115
HH owns giant screen TV (over 42 in)	28,580	29.6%	114
Most recent HH TV purchase: regular screen (13-26 in)	12,394	12.8%	96
Most recent HH TV purchase: large screen (27-35 in)	18,911	19.6%	89
Most recent HH TV purchase: big screen (36-42 in)	24,836	25.7%	113
Most recent HH TV purchase: giant screen (over 42 in)	21,797	22.6%	113
HH owns Internet video device for TV	10,583	11.0%	156
HH purchased video game system in last 12 months	9,393	9.7%	123
HH owns video game system: handheld	14,107	14.6%	98
HH owns video game system: attached to TV/computer	42,918	44.5%	100
HH owns video game system: Nintendo 3DS	3,831	4.0%	112
HH owns video game system: Nintendo DS/DS Lite	6,127	6.4%	105
HH owns video game system: Nintendo DSi	3,626	3.8%	92
HH owns video game system: Nintendo Wii	24,763	25.7%	110
HH owns video game system: PlayStation 2 (PS2)	7,419	7.7%	79
HH owns video game system: PlayStation 3 (PS3)	12,494	13.0%	95
HH owns video game system: Sony PSP/PSPgo	2,230	2.3%	96
HH owns video game system: Xbox 360	18,375	19.0%	102
HH purchased 5+ video games in last 12 months	6,142	6.4%	104
HH spent $101+ on video games in last 12 months	8,196	8.5%	102
Have access to Internet at home	197,869	94.0%	115
Connection to Internet at home: via cable modem	93,755	44.5%	127
Connection to Internet at home: via DSL	28,764	13.7%	84
Connection to Internet at home: via fiber optic	46,601	22.1%	198
Access Internet at home via high speed connection	192,985	91.7%	118
Spend 10+ hrs online (excl email/IM time) daily	8,731	4.1%	120
Spend 5-9.9 hrs online (excl email/IM time) daily	27,387	13.0%	128
Spend 2-4.9 hrs online (excl email/IM time) daily	53,475	25.4%	124
Spend 1-1.9 hrs online (excl email/IM time) daily	41,517	19.7%	116
Spend 0.5-0.9 hrs online(excl email/IM time) daily	31,015	14.7%	117
Spend <0.5 hrs online (excl email/IM time) daily	19,399	9.2%	92
Used Internet in last 30 days	194,099	92.2%	114
Used Internet/30 days: at home	189,416	90.0%	118
Used Internet/30 days: at work	109,129	51.9%	134
Used Internet/30 days: at school/library	28,966	13.8%	111

Data Note: An MPI (Market Potential Index) measures the relative likelihood of the adults or households in the specified trade area to exhibit certain consumer behavior or purchasing patterns compared to the U.S. An MPI of 100 represents the U.S. average.
Source: These data are based upon national propensities to use various products and services, applied to local demographic composition. Usage data were collected by GfK MRI in a nationally representative survey of U.S. households. Esri forecasts for 2016 and 2021.

August 19, 2016

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Electronics and Internet Market Potential

Fairfax 1,3,5
10430 Main St, Fairfax, Virginia, 22030
Ring: 5 mile radius

Prepared by Esri
Latitude: 38.84624
Longitude: -77.30655

Product/Consumer Behavior	Expected Number of Adults/HHs	Percent	MPI
Used Internet/30 days: not hm/work/school/library	76,359	36.3%	129
Accessed Internet in last 30 days using computer	185,909	88.3%	119
Accessed Internet in last 30 days using cell phone	143,409	68.1%	122
Used Wi-Fi/wireless connection outside hm/30 days	85,613	40.7%	142
Internet last 30 days: visited forum	10,615	5.0%	102
Internet last 30 days: used email	184,061	87.5%	123
Internet last 30 days: used IM	109,617	52.1%	107
Internet last 30 days: made personal purchase	129,234	61.4%	146
Internet last 30 days: made business purchase	34,334	16.3%	146
Internet last 30 days: paid bills online	118,600	56.4%	125
Internet last 30 days: took online class	17,416	8.3%	113
Internet last 30 days: looked for employment	32,089	15.2%	98
Internet last 30 days: traded/tracked investments	44,285	21.0%	181
Internet last 30 days: made travel plans	70,545	33.5%	178
Internet last 30 days: obtained auto info	28,223	13.4%	119
Internet last 30 days: obtained financial info	87,286	41.5%	138
Internet last 30 days: obtained medical info	68,238	32.4%	138
Internet last 30 days: checked movie listing/times	66,966	31.8%	136
Internet last 30 days: obtained latest news	131,721	62.6%	140
Internet last 30 days: obtained parenting info	15,109	7.2%	126
Internet last 30 days: obtained real estate info	44,522	21.2%	163
Internet last 30 days: obtained sports news/info	82,134	39.0%	130
Internet last 30 days: visited online blog	41,491	19.7%	156
Internet last 30 days: wrote online blog	8,317	4.0%	133
Internet last 30 days: used online dating website	5,424	2.6%	136
Internet last 30 days: played games online	55,563	26.4%	91
Internet last 30 days: sent greeting card	14,744	7.0%	145
Internet last 30 days: made phone call	48,156	22.9%	129
Internet last 30 days: shared photos via website	74,592	35.4%	122
Internet last 30 days: looked for recipes	88,947	42.3%	125
Internet last 30 days: added video to website	15,263	7.3%	114
Internet last 30 days: downloaded a movie	21,333	10.1%	141
Internet last 30 days: downloaded music	54,384	25.8%	113
Internet last 30 days: downloaded podcast	13,354	6.3%	165
Internet last 30 days: downloaded TV program	14,229	6.8%	141
Internet last 30 days: downloaded a video game	19,451	9.2%	91
Internet last 30 days: watched movie online	44,053	20.9%	131
Internet last 30 days: watched TV program online	42,161	20.0%	134
Purch/rntd video download/strm/30 days: amazon.com	11,261	5.4%	127
Purch/rntd video download/strm/30 days: hulu.com	8,457	4.0%	111
Purch/rntd video download/strm/30 days: itunes.com	9,168	4.4%	137
Purch/rntd video download/strm/30 days:netflix.com	34,436	16.4%	137
Used online gaming srv/30 days: PlayStation Network	8,049	3.8%	83
Used online gaming srv/30 days: Xbox Live	10,200	4.8%	87
Played Massive Multi-Player Online game/30 days	6,687	3.2%	89
Visited any Spanish language website last 30 days	4,215	2.0%	65
Visited website in last 30 days: facebook.com	125,477	59.6%	108
Visited website in last 30 days: LinkedIn.com	45,735	21.7%	208
Visited website in last 30 days: photobucket.com	4,626	2.2%	106
Visited website in last 30 days: picasa.com	8,127	3.9%	154
Visited website in last 30 days: shutterfly.com	12,764	6.1%	191
Visited website in last 30 days: tumblr.com	11,627	5.5%	156
Visited website in last 30 days: twitter.com	29,042	13.8%	122
Visited website in last 30 days: yelp.com	21,284	10.1%	246
Visited website in last 30 days: YouTube.com	109,456	52.0%	116

Data Note: An MPI (Market Potential Index) measures the relative likelihood of the adults or households in the specified trade area to exhibit certain consumer behavior or purchasing patterns compared to the U.S. An MPI of 100 represents the U.S. average.
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August 19, 2016

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Electronics and Internet Market Potential

Fairfax 1,3,5
10430 Main St, Fairfax, Virginia, 22030
Ring: 5 mile radius

Prepared by Esri
Latitude: 38.84624
Longitude: -77.30655

Product/Consumer Behavior	Expected Number of Adults/HHs	Percent	MPI
Used website/search engine/30 days: ask.com	14,814	7.0%	96
Used website/search engine/30 days: bing.com	42,464	20.2%	118
Used website/search engine/30 days: google.com	182,553	86.7%	118
Used website/search engine/30 days: yahoo.com	74,162	35.2%	105
Visited news website in last 30 days: ABCnews.com	14,026	6.7%	130
Visited news website in last 30 days: CBSnews.com	9,401	4.5%	130
Visited news website in last 30 days: cnn.com	43,526	20.7%	173
Visited news website in last 30 days: foxnews.com	23,570	11.2%	116
Visited news website in last 30 days: msnbc.com	14,256	6.8%	133
Visited news website in last 30 days: Yahoo! News	36,847	17.5%	126

Data Note: An MPI (Market Potential Index) measures the relative likelihood of the adults or households in the specified trade area to exhibit certain consumer behavior or purchasing patterns compared to the U.S. An MPI of 100 represents the U.S. average.
Source: These data are based upon national propensities to use various products and services, applied to local demographic composition. Usage data were collected by GfK MRI in a nationally representative survey of U.S. households. Esri forecasts for 2016 and 2021.

August 19, 2016

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Retail MarketPlace Profile

Fairfax 1,3,5
10430 Main St, Fairfax, Virginia, 22030
Ring: 1 mile radius

Prepared by Esri
Latitude: 38.84624
Longitude: -77.30655

Summary Demographics

2016 Population	14,487
2016 Households	4,768
2016 Median Disposable Income	$74,966
2016 Per Capita Income	$46,819

Industry Summary	NAICS	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
Total Retail Trade and Food & Drink	44-45,722	$316,595,339	$664,836,175	-$348,240,836	-35.5	260
Total Retail Trade	44-45	$284,535,776	$589,344,003	-$304,808,227	-34.9	167
Total Food & Drink	722	$32,059,563	$75,492,172	-$43,432,609	-40.4	93

Industry Group	NAICS	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
Motor Vehicle & Parts Dealers	441	$64,665,743	$273,401,375	-$208,735,632	-61.7	20
Automobile Dealers	4411	$53,569,207	$254,967,496	-$201,398,289	-65.3	12
Other Motor Vehicle Dealers	4412	$7,016,103	$12,676,719	-$5,660,616	-28.7	2
Auto Parts, Accessories & Tire Stores	4413	$4,080,433	$5,757,159	-$1,676,726	-17.0	7
Furniture & Home Furnishings Stores	442	$8,681,774	$12,240,111	-$3,558,337	-17.0	7
Furniture Stores	4421	$5,162,804	$2,551,801	$2,611,003	33.8	3
Home Furnishings Stores	4422	$3,518,970	$9,688,311	-$6,169,341	-46.7	4
Electronics & Appliance Stores	443	$12,303,407	$60,340,281	-$48,036,874	-66.1	28
Bldg Materials, Garden Equip. & Supply Stores	444	$15,517,010	$17,703,499	-$2,186,489	-6.6	10
Bldg Material & Supplies Dealers	4441	$14,281,579	$17,699,773	-$3,418,194	-10.7	10
Lawn & Garden Equip & Supply Stores	4442	$1,235,430	$0	$1,235,430	100.0	0
Food & Beverage Stores	445	$54,227,914	$50,722,501	$3,505,413	3.3	19
Grocery Stores	4451	$50,463,147	$44,220,604	$6,242,543	6.6	12
Specialty Food Stores	4452	$1,566,255	$1,773,350	-$207,095	-6.2	5
Beer, Wine & Liquor Stores	4453	$2,198,511	$4,728,547	-$2,530,036	-36.5	2
Health & Personal Care Stores	446,4461	$15,221,476	$21,259,242	-$6,037,766	-16.6	19
Gasoline Stations	447,4471	$18,868,503	$17,337,903	$1,530,600	4.2	6
Clothing & Clothing Accessories Stores	448	$14,973,342	$10,543,342	$4,430,000	17.4	18
Clothing Stores	4481	$10,670,507	$5,479,371	$5,191,136	32.1	11
Shoe Stores	4482	$1,653,848	$1,975,525	-$321,677	-8.9	4
Jewelry, Luggage & Leather Goods Stores	4483	$2,648,987	$3,088,446	-$439,459	-7.7	4
Sporting Goods, Hobby, Book & Music Stores	451	$7,997,465	$10,934,269	-$2,936,804	-15.5	13
Sporting Goods/Hobby/Musical Instr Stores	4511	$6,434,061	$9,544,497	-$3,110,436	-19.5	10
Book, Periodical & Music Stores	4512	$1,563,404	$1,389,772	$173,632	5.9	3
General Merchandise Stores	452	$54,175,928	$21,155,385	$33,020,543	43.8	3
Department Stores Excluding Leased Depts.	4521	$41,726,017	$19,797,699	$21,928,318	35.6	1
Other General Merchandise Stores	4529	$12,449,910	$1,357,686	$11,092,224	80.3	2
Miscellaneous Store Retailers	453	$9,292,088	$11,529,873	-$2,237,785	-10.7	16
Florists	4531	$530,921	$402,670	$128,251	13.7	2
Office Supplies, Stationery & Gift Stores	4532	$2,796,085	$5,801,362	-$3,005,277	-35.0	4
Used Merchandise Stores	4533	$1,408,432	$558,153	$850,279	43.2	3
Other Miscellaneous Store Retailers	4539	$4,556,649	$4,767,688	-$211,039	-2.3	7
Nonstore Retailers	454	$8,611,127	$82,176,222	-$73,565,095	-81.0	7
Electronic Shopping & Mail-Order Houses	4541	$5,996,099	$80,713,744	-$74,717,645	-86.2	4
Vending Machine Operators	4542	$463,444	$0	$463,444	100.0	0
Direct Selling Establishments	4543	$2,151,585	$1,396,831	$754,754	21.3	3
Food Services & Drinking Places	722	$32,059,563	$75,492,172	-$43,432,609	-40.4	93
Full-Service Restaurants	7221	$17,786,543	$39,406,503	-$21,619,960	-37.8	59
Limited-Service Eating Places	7222	$13,398,496	$34,834,471	-$21,435,975	-44.4	32
Special Food Services	7223	$627,487	$1,251,198	-$623,711	-33.2	2
Drinking Places - Alcoholic Beverages	7224	$247,037	$0	$247,037	100.0	0

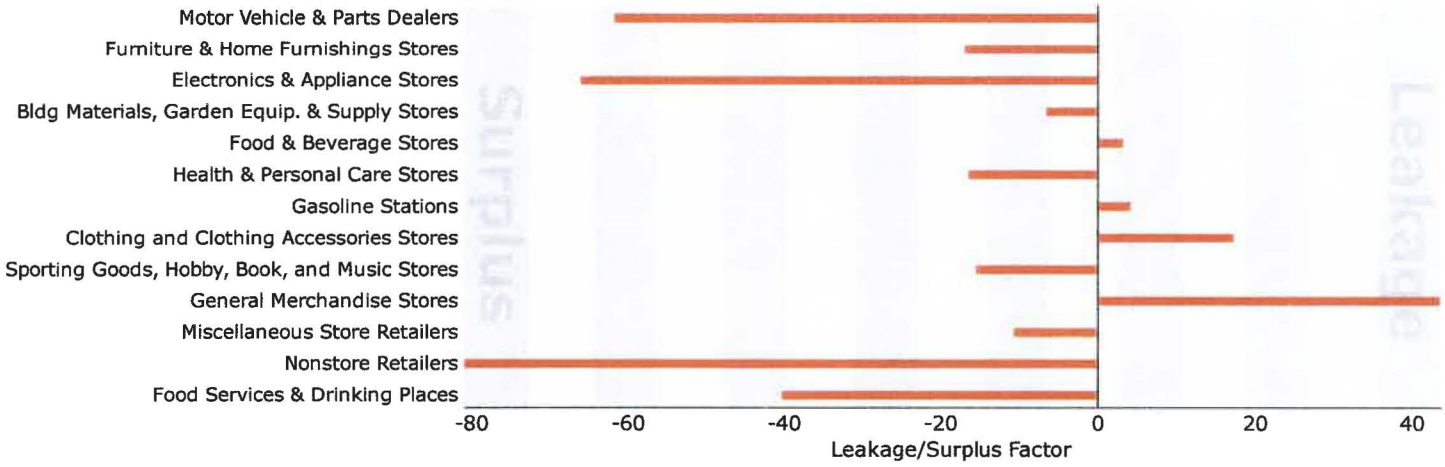
Data Note: Supply (retail sales) estimates sales to consumers by establishments. Sales to businesses are excluded. Demand (retail potential) estimates the expected amount spent by consumers at retail establishments. Supply and demand estimates are in current dollars. The Leakage/Surplus Factor presents a snapshot of retail opportunity. This is a measure of the relationship between supply and demand that ranges from +100 (total leakage) to -100 (total surplus). A positive value represents 'leakage' of retail opportunity outside the trade area. A negative value represents a surplus of retail sales, a market where customers are drawn in from outside the trade area. The Retail Gap represents the difference between Retail Potential and Retail Sales. Esri uses the North American Industry Classification System (NAICS) to classify businesses by their primary type of economic activity. Retail establishments are classified into 27 industry groups in the Retail Trade sector, as well as four industry groups within the Food Services & Drinking Establishments subsector. For more information on the Retail MarketPlace data, please click the link below to view the Methodology Statement.
http://www.esri.com/library/whitepapers/pdfs/esri-data-retail-marketplace.pdf

Source: Esri and Infogroup. Retail MarketPlace 2016 Release 1 (2015 data in 2016 geography) Copyright 2016 Infogroup, Inc. All rights reserved.

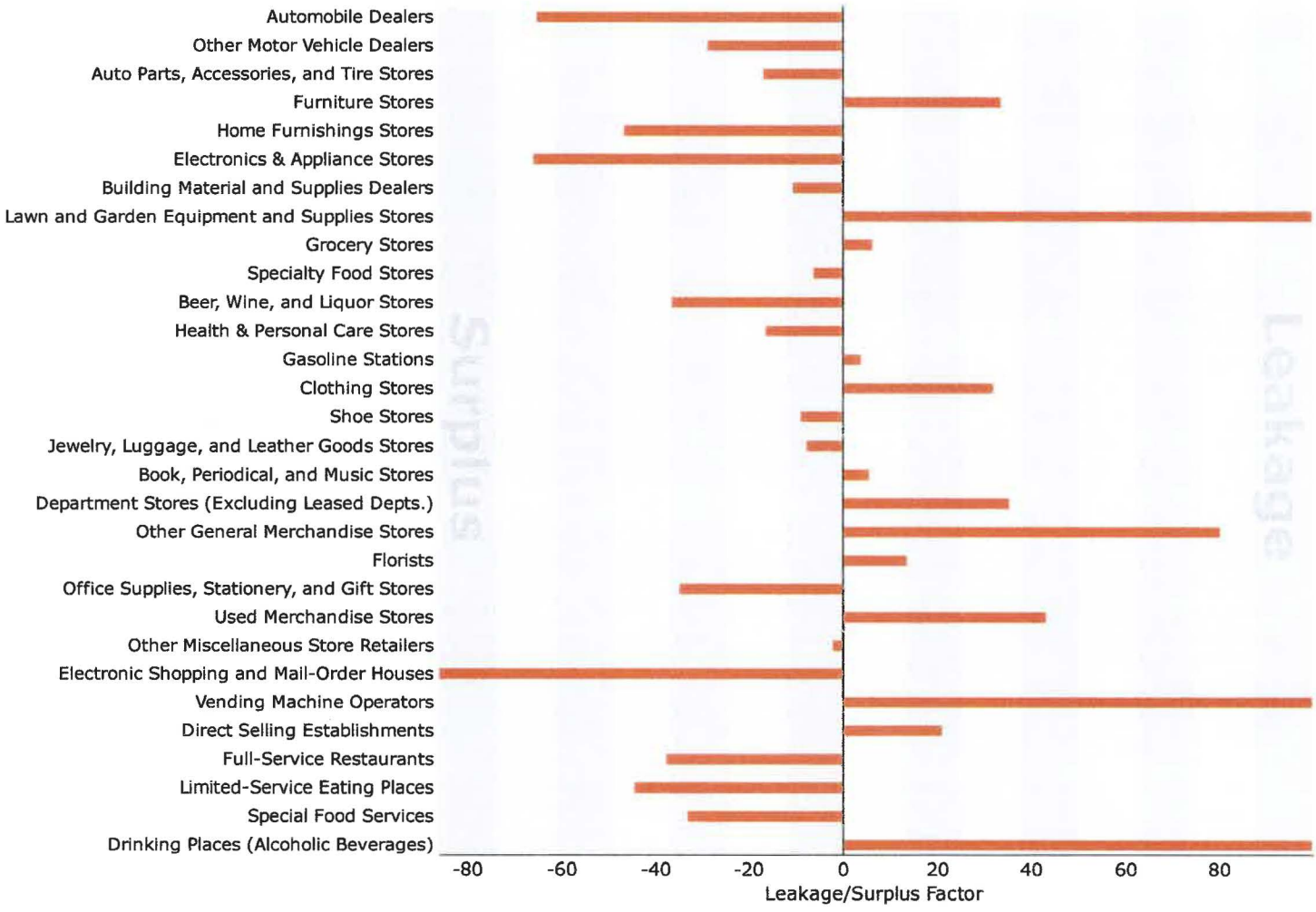
August 19, 2016

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Leakage/Surplus Factor by Industry Subsector



Leakage/Surplus Factor by Industry Group



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August 19, 2016

Retail MarketPlace Profile

Fairfax 1,3,5
10430 Main St, Fairfax, Virginia, 22030
Ring: 3 mile radius

Prepared by Esri
Latitude: 38.84624
Longitude: -77.30655

Summary Demographics

2016 Population	114,214
2016 Households	40,121
2016 Median Disposable Income	$80,690
2016 Per Capita Income	$52,268

Industry Summary	NAICS	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
Total Retail Trade and Food & Drink	44-45,722	$3,001,182,298	$2,160,252,488	$840,929,810	16.3	870
Total Retail Trade	44-45	$2,695,432,024	$1,900,813,641	$794,618,383	17.3	578
Total Food & Drink	722	$305,750,274	$259,438,847	$46,311,427	8.2	292

Industry Group	NAICS	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
Motor Vehicle & Parts Dealers	441	$617,409,294	$665,942,028	-$48,532,734	-3.8	59
Automobile Dealers	4411	$514,591,200	$618,003,566	-$103,412,366	-9.1	33
Other Motor Vehicle Dealers	4412	$64,732,764	$28,883,199	$35,849,565	38.3	5
Auto Parts, Accessories & Tire Stores	4413	$38,085,329	$19,055,263	$19,030,066	33.3	21
Furniture & Home Furnishings Stores	442	$83,540,428	$54,045,760	$29,494,668	21.4	48
Furniture Stores	4421	$50,093,029	$22,868,270	$27,224,759	37.3	20
Home Furnishings Stores	4422	$33,447,399	$31,177,490	$2,269,909	3.5	28
Electronics & Appliance Stores	443	$116,222,841	$188,629,828	-$72,406,987	-23.8	91
Bldg Materials, Garden Equip. & Supply Stores	444	$141,778,711	$57,386,273	$84,392,438	42.4	31
Bldg Material & Supplies Dealers	4441	$130,298,264	$38,954,030	$91,344,234	54.0	25
Lawn & Garden Equip & Supply Stores	4442	$11,480,448	$18,432,243	-$6,951,795	-23.2	6
Food & Beverage Stores	445	$511,841,199	$320,424,204	$191,416,995	23.0	67
Grocery Stores	4451	$476,272,041	$296,822,096	$179,449,945	23.2	39
Specialty Food Stores	4452	$14,791,702	$9,205,741	$5,585,961	23.3	20
Beer, Wine & Liquor Stores	4453	$20,777,456	$14,396,367	$6,381,089	18.1	8
Health & Personal Care Stores	446,4461	$141,821,429	$78,292,635	$63,528,794	28.9	52
Gasoline Stations	447,4471	$179,373,023	$83,627,148	$95,745,875	36.4	28
Clothing & Clothing Accessories Stores	448	$143,355,177	$52,980,231	$90,374,946	46.0	64
Clothing Stores	4481	$102,174,681	$35,707,625	$66,467,056	48.2	43
Shoe Stores	4482	$15,825,697	$7,465,202	$8,360,495	35.9	8
Jewelry, Luggage & Leather Goods Stores	4483	$25,354,800	$9,807,404	$15,547,396	44.2	13
Sporting Goods, Hobby, Book & Music Stores	451	$75,837,978	$51,306,847	$24,531,131	19.3	41
Sporting Goods/Hobby/Musical Instr Stores	4511	$60,849,574	$47,397,186	$13,452,388	12.4	31
Book, Periodical & Music Stores	4512	$14,988,404	$3,909,660	$11,078,744	58.6	10
General Merchandise Stores	452	$515,945,008	$203,429,805	$312,515,203	43.4	18
Department Stores Excluding Leased Depts.	4521	$398,373,033	$191,690,311	$206,682,722	35.0	8
Other General Merchandise Stores	4529	$117,571,976	$11,739,494	$105,832,482	81.8	10
Miscellaneous Store Retailers	453	$87,685,335	$49,972,203	$37,713,132	27.4	63
Florists	4531	$4,944,060	$2,721,384	$2,222,676	29.0	11
Office Supplies, Stationery & Gift Stores	4532	$26,320,786	$13,887,790	$12,432,996	30.9	16
Used Merchandise Stores	4533	$13,445,183	$1,844,253	$11,600,930	75.9	6
Other Miscellaneous Store Retailers	4539	$42,975,306	$31,518,777	$11,456,529	15.4	30
Nonstore Retailers	454	$80,621,600	$94,776,678	-$14,155,078	-8.1	15
Electronic Shopping & Mail-Order Houses	4541	$56,566,174	$92,912,508	-$36,346,334	-24.3	10
Vending Machine Operators	4542	$4,377,801	$193,003	$4,184,798	91.6	1
Direct Selling Establishments	4543	$19,677,625	$1,671,167	$18,006,458	84.3	4
Food Services & Drinking Places	722	$305,750,274	$259,438,847	$46,311,427	8.2	292
Full-Service Restaurants	7221	$169,757,397	$146,209,108	$23,548,289	7.5	177
Limited-Service Eating Places	7222	$127,582,270	$110,833,050	$16,749,220	7.0	110
Special Food Services	7223	$6,055,165	$1,833,701	$4,221,464	53.5	5
Drinking Places - Alcoholic Beverages	7224	$2,355,443	$562,988	$1,792,455	61.4	1

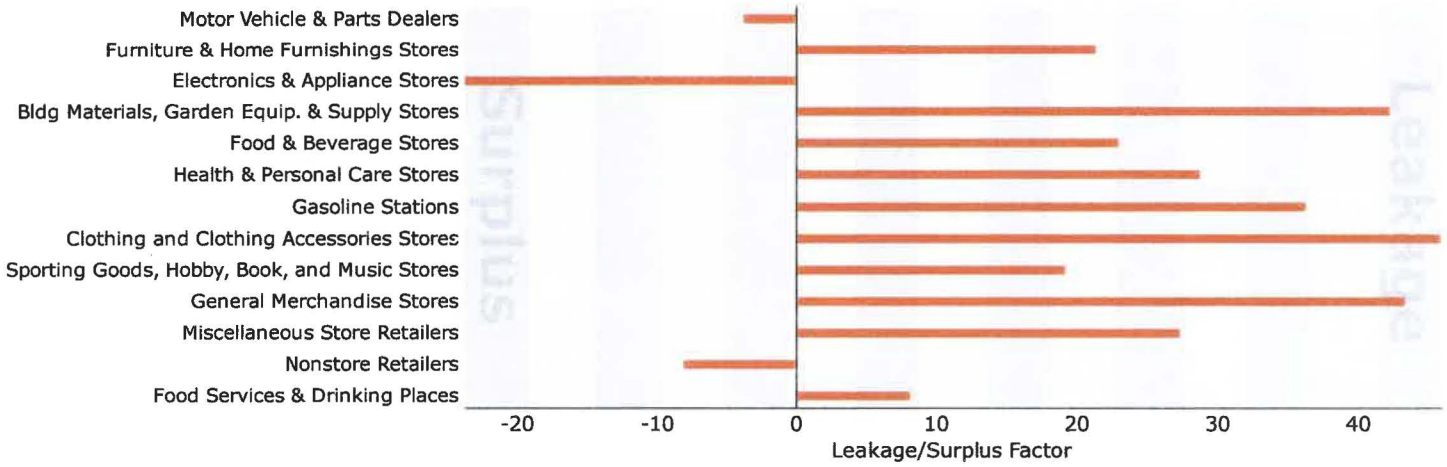
Data Note: Supply (retail sales) estimates sales to consumers by establishments. Sales to businesses are excluded. Demand (retail potential) estimates the expected amount spent by consumers at retail establishments. Supply and demand estimates are in current dollars. The Leakage/Surplus Factor presents a snapshot of retail opportunity. This is a measure of the relationship between supply and demand that ranges from +100 (total leakage) to -100 (total surplus). A positive value represents 'leakage' of retail opportunity outside the trade area. A negative value represents a surplus of retail sales, a market where customers are drawn in from outside the trade area. The Retail Gap represents the difference between Retail Potential and Retail Sales. Esri uses the North American Industry Classification System (NAICS) to classify businesses by their primary type of economic activity. Retail establishments are classified into 27 industry groups in the Retail Trade sector, as well as four industry groups within the Food Services & Drinking Establishments subsector. For more information on the Retail MarketPlace data, please click the link below to view the Methodology Statement.
http://www.esri.com/library/whitepapers/pdfs/esri-data-retail-marketplace.pdf

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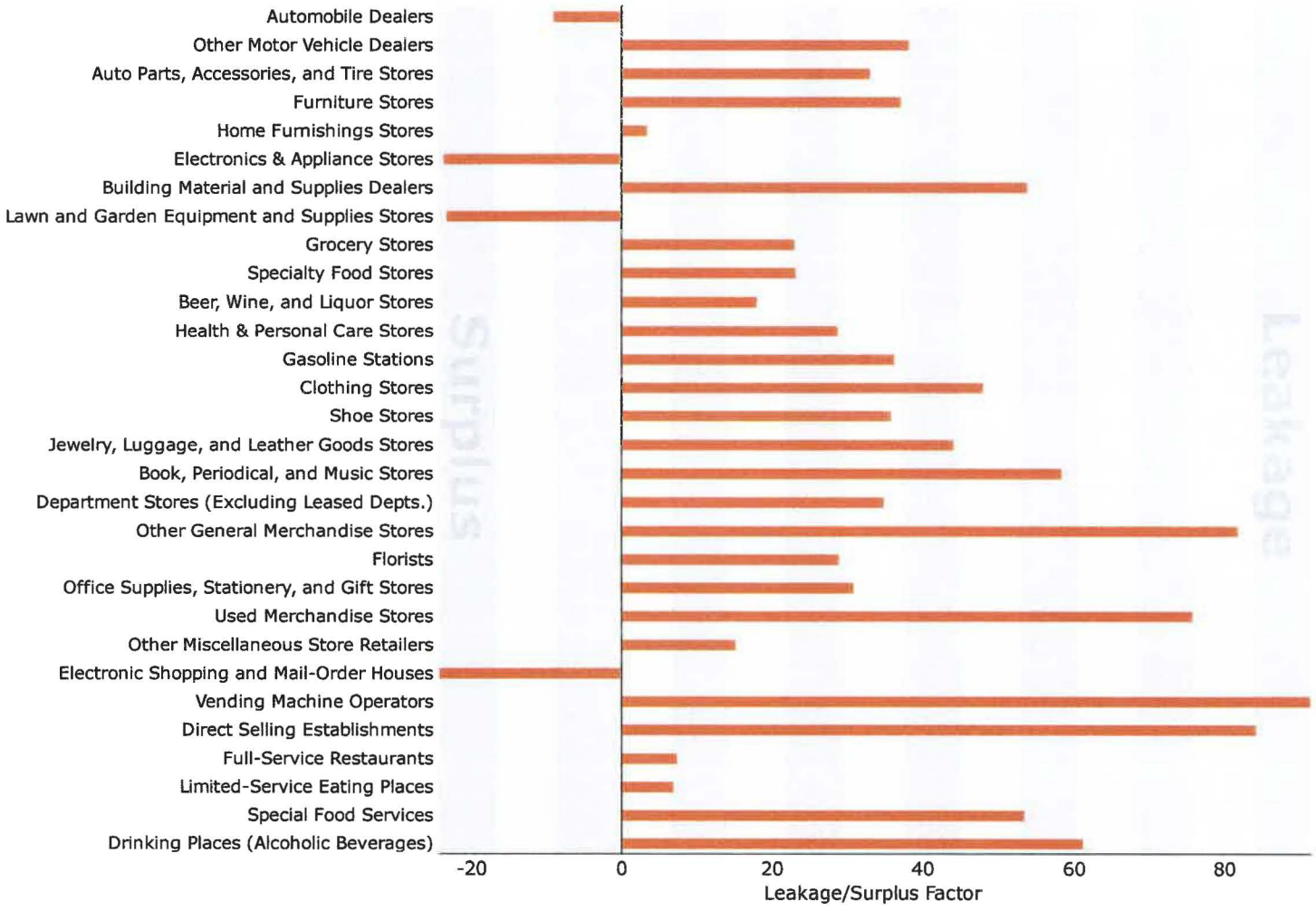
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Leakage/Surplus Factor by Industry Subsector



Leakage/Surplus Factor by Industry Group



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August 19, 2016

Retail MarketPlace Profile

Fairfax 1,3,5
10430 Main St, Fairfax, Virginia, 22030
Ring: 5 mile radius

Prepared by Esri
Latitude: 38.84624
Longitude: -77.30655

Summary Demographics	
2016 Population	267,789
2016 Households	96,463
2016 Median Disposable Income	$83,840
2016 Per Capita Income	$56,095

Industry Summary	NAICS	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
Total Retail Trade and Food & Drink	44-45,722	$7,570,308,378	$4,730,645,329	$2,839,663,049	23.1	1,924
Total Retail Trade	44-45	$6,799,368,125	$4,164,649,439	$2,634,718,686	24.0	1,305
Total Food & Drink	722	$770,940,253	$565,995,890	$204,944,363	15.3	619

Industry Group	NAICS	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
Motor Vehicle & Parts Dealers	441	$1,560,288,300	$823,843,340	$736,444,960	30.9	88
Automobile Dealers	4411	$1,298,169,052	$756,412,270	$541,756,782	26.4	43
Other Motor Vehicle Dealers	4412	$165,938,445	$32,348,539	$133,589,906	67.4	7
Auto Parts, Accessories & Tire Stores	4413	$96,180,803	$35,082,531	$61,098,272	46.5	39
Furniture & Home Furnishings Stores	442	$211,883,417	$108,646,411	$103,237,006	32.2	99
Furniture Stores	4421	$126,950,819	$47,379,187	$79,571,632	45.6	33
Home Furnishings Stores	4422	$84,932,598	$61,267,223	$23,665,375	16.2	66
Electronics & Appliance Stores	443	$293,871,906	$426,664,222	-$132,792,316	-18.4	197
Bldg Materials, Garden Equip. & Supply Stores	444	$364,848,682	$156,095,571	$208,753,111	40.1	75
Bldg Material & Supplies Dealers	4441	$335,353,302	$117,237,759	$218,115,543	48.2	58
Lawn & Garden Equip & Supply Stores	4442	$29,495,380	$38,857,813	-$9,362,433	-13.7	17
Food & Beverage Stores	445	$1,282,952,311	$716,878,541	$566,073,770	28.3	128
Grocery Stores	4451	$1,193,359,536	$658,746,475	$534,613,061	28.9	76
Specialty Food Stores	4452	$37,084,909	$36,274,076	$810,833	1.1	39
Beer, Wine & Liquor Stores	4453	$52,507,867	$21,857,990	$30,649,877	41.2	14
Health & Personal Care Stores	446,4461	$358,813,901	$227,823,066	$130,990,835	22.3	128
Gasoline Stations	447,4471	$449,413,552	$200,409,668	$249,003,884	38.3	58
Clothing & Clothing Accessories Stores	448	$361,312,684	$219,259,316	$142,053,368	24.5	194
Clothing Stores	4481	$257,327,554	$159,206,246	$98,121,308	23.6	130
Shoe Stores	4482	$39,585,734	$24,305,125	$15,280,609	23.9	25
Jewelry, Luggage & Leather Goods Stores	4483	$64,399,396	$35,747,944	$28,651,452	28.6	39
Sporting Goods, Hobby, Book & Music Stores	451	$191,210,819	$148,275,134	$42,935,685	12.6	95
Sporting Goods/Hobby/Musical Instr Stores	4511	$153,419,124	$128,291,048	$25,128,076	8.9	72
Book, Periodical & Music Stores	4512	$37,791,694	$19,984,085	$17,807,609	30.8	23
General Merchandise Stores	452	$1,299,138,913	$874,061,597	$425,077,316	19.6	47
Department Stores Excluding Leased Depts.	4521	$1,004,312,985	$627,669,482	$376,643,503	23.1	21
Other General Merchandise Stores	4529	$294,825,928	$246,392,114	$48,433,814	8.9	26
Miscellaneous Store Retailers	453	$221,136,594	$136,979,513	$84,157,081	23.5	161
Florists	4531	$12,728,479	$6,174,220	$6,554,259	34.7	22
Office Supplies, Stationery & Gift Stores	4532	$66,479,612	$37,823,617	$28,655,995	27.5	55
Used Merchandise Stores	4533	$33,927,594	$4,204,523	$29,723,071	77.9	16
Other Miscellaneous Store Retailers	4539	$108,000,909	$88,777,153	$19,223,756	9.8	68
Nonstore Retailers	454	$204,497,046	$125,713,061	$78,783,985	23.9	34
Electronic Shopping & Mail-Order Houses	4541	$142,857,553	$111,802,556	$31,054,997	12.2	18
Vending Machine Operators	4542	$10,971,359	$625,409	$10,345,950	89.2	4
Direct Selling Establishments	4543	$50,668,133	$13,285,097	$37,383,036	58.5	12
Food Services & Drinking Places	722	$770,940,253	$565,995,890	$204,944,363	15.3	619
Full-Service Restaurants	7221	$428,577,468	$304,076,177	$124,501,291	17.0	364
Limited-Service Eating Places	7222	$320,967,768	$246,340,773	$74,626,995	13.2	233
Special Food Services	7223	$15,501,340	$11,001,355	$4,499,985	17.0	19
Drinking Places - Alcoholic Beverages	7224	$5,893,677	$4,577,586	$1,316,091	12.6	4

Data Note: Supply (retail sales) estimates sales to consumers by establishments. Sales to businesses are excluded. Demand (retail potential) estimates the expected amount spent by consumers at retail establishments. Supply and demand estimates are in current dollars. The Leakage/Surplus Factor presents a snapshot of retail opportunity. This is a measure of the relationship between supply and demand that ranges from +100 (total leakage) to -100 (total surplus). A positive value represents 'leakage' of retail opportunity outside the trade area. A negative value represents a surplus of retail sales, a market where customers are drawn in from outside the trade area. The Retail Gap represents the difference between Retail Potential and Retail Sales. Esri uses the North American Industry Classification System (NAICS) to classify businesses by their primary type of economic activity. Retail establishments are classified into 27 industry groups in the Retail Trade sector, as well as four industry groups within the Food Services & Drinking Establishments subsector. For more information on the Retail MarketPlace data, please click the link below to view the Methodology Statement.
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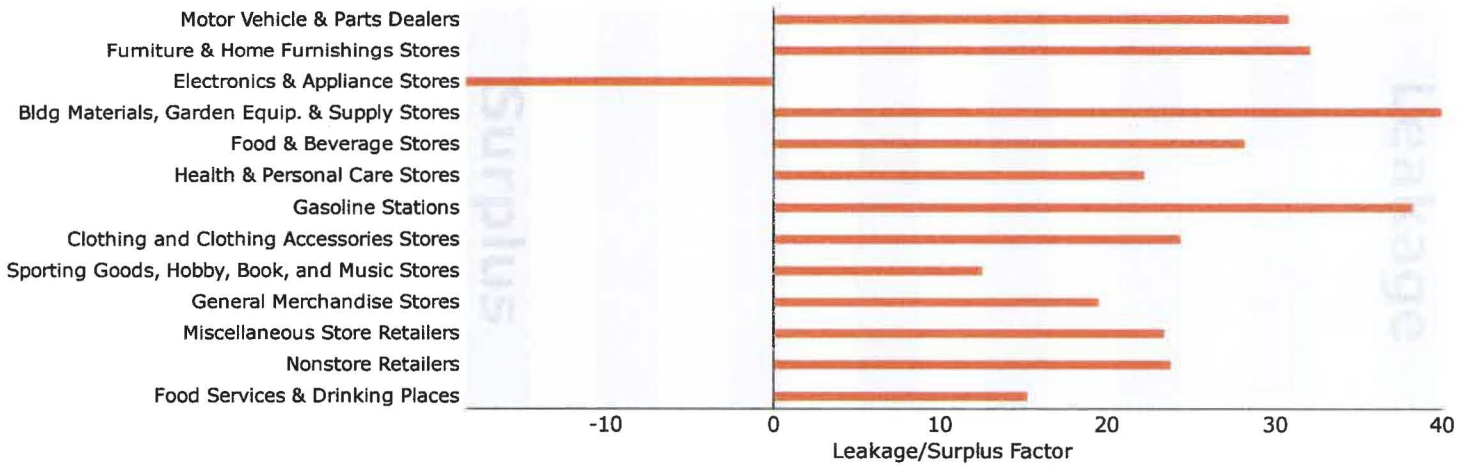
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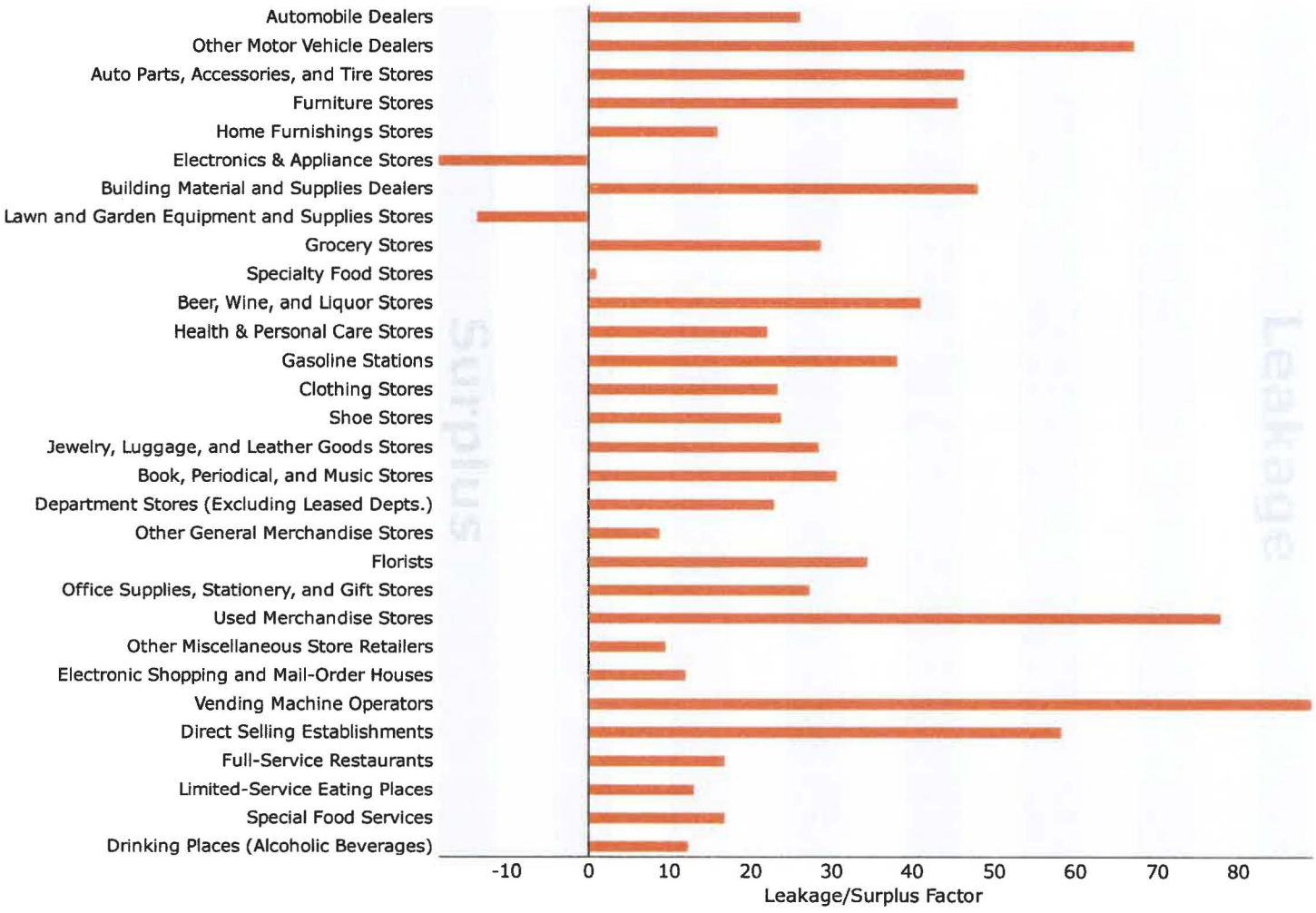
Fairfax 1,3,5
10430 Main St, Fairfax, Virginia, 22030
Ring: 5 mile radius

Prepared by Esri
Latitude: 38.8462
Longitude: -77.3065

Leakage/Surplus Factor by Industry Subsector



Leakage/Surplus Factor by Industry Group



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August 19, 2016

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Data Analysis

Main Street at Chain Bridge Road	1.0 mile radius	3.0 mile radisu	5.0 mile radius	Old Town	Fairfax City	Fairfax County (ex. city)
Population (2016)	14,487	114,214	267,789	3,057	24,408	1,124,231
Households (2016)	4,395	37,972	91,684	765	8,990	405,962
Area (Sq Mi)	3.1	28.3	78.5	0.5	6.4	406.0
Population / Sq Mi	4,611	4,039	3,410	5,823	3,839	2,769
Households / Sq Mi	1,399	1,343	1,167	1,457	1,414	1,000
Pop. Growth (2016-2021)	1.25%	1.08%	0.85%	0.79%	1.36%	0.65%
Population by Race						
White	66%	62%	63%	63%	65%	59%
Black	8%	7%	6%	21%	5%	10%
American Indian	1%	0%	0%	1%	1%	0%
Asian	14%	22%	22%	9%	18%	20%
Pacific Islander	0%	0%	0%	0%	0%	0%
Some other race	6%	4%	4%	4%	6%	7%
Two or more races	4%	5%	4%	3%	5%	5%
Total Hispanic Population	18%	13%	13%	22%	17%	17%
Population by Sex						
Male	53%	50%	49%	68%	49%	50%
Female	47%	50%	51%	32%	51%	50%
Population by Age						
Ages 0 - 4	4.6%	5.6%	5.8%	2.8%	5.3%	6.7%
Ages 5 - 9	4.6%	5.7%	6.2%	2.6%	5.6%	6.7%
Ages 10 - 14	4.9%	6.0%	6.5%	2.6%	5.8%	6.7%
Ages 15 - 24	17.4%	16.9%	13.8%	21.7%	11.2%	11.8%
Ages 25 - 34	14.8%	14.7%	14.3%	22.3%	16.0%	14.7%
Ages 35 - 44	13.4%	13.8%	14.3%	16.0%	13.4%	15.3%
Ages 45 - 54	14.6%	15.1%	15.9%	13.7%	14.0%	16.2%
Ages 55 - 64	12.1%	11.7%	12.5%	8.9%	13.2%	12.2%
Ages 65 - 74	7.0%	6.1%	6.4%	4.6%	8.7%	5.8%
Ages 75 - 84	4.2%	3.1%	3.1%	2.8%	4.5%	2.8%
Ages 85+	2.4%	1.3%	1.2%	2.1%	2.3%	1.2%

Main Street at Chain Bridge Road	1.0 mile radius	3.0 mile radisu	5.0 mile radius	Old Town	Fairfax City	Fairfax County (ex. city)
Age 9 or under	9.2%	11.3%	12.0%	5.4%	10.9%	13.4%
Ages 24 or younger	31.5%	34.2%	32.3%	29.7%	27.9%	31.9%
Age 25 or older	68.5%	65.8%	67.7%	70.4%	72.1%	68.2%
Age 55 or older	25.7%	22.2%	23.2%	18.4%	28.7%	22.0%
Age 65 or older	13.6%	10.5%	10.7%	9.5%	15.5%	9.8%
Median Age (Total population)	38.5	36.9	38.4	34.3	39.5	38.3
Households by Type						
All HHs with children	30%	34%	35%	26%	31%	37%
Multigenerational Households	3%	3%	3%	3%	4%	4%
Average HH size	2.59	2.66	2.69	2.09	2.66	2.74
Household Occupancy and Mortgage Status						
Owner occupied HHs	74.0%	68.3%	71.9%	68.8%	71.0%	69.5%
Owned Free & Clear	15.9%	11.8%	11.7%	14.2%	15.1%	10.7%
Renter occupied HHs	26.0%	31.7%	28.1%	31.2%	29.0%	30.5%
Households by Income						
< $15,000	4.3%	3.9%	3.4%	5.2%	4.2%	3.8%
$15,000 - $24,999	4.3%	2.9%	2.7%	5.2%	3.3%	3.2%
$25,000 - $34,999	3.8%	3.4%	2.9%	3.7%	3.5%	3.7%
$35,000 - $49,999	8.1%	5.5%	5.5%	7.5%	7.4%	6.7%
$50,000 - $74,999	14.7%	13.1%	12.4%	15.6%	15.2%	13.0%
$75,000 - $99,999	13.7%	13.8%	12.8%	13.5%	14.5%	12.6%
$100,000 - $149,999	19.8%	23.9%	24.4%	19.7%	23.7%	22.7%
$150,000 - $$199,999	11.3%	13.8%	14.6%	11.2%	10.9%	13.5%
$200,000 +	19.9%	19.7%	21.3%	18.4%	17.1%	20.7%
Median HH Income	$101,834	$110,850	$115,675	$98,597	$102,385	$110,857
Average HH Income	$135,697	$144,359	$153,324	$131,747	$128,143	$147,644

Main Street at Chain Bridge Road	1.0 mile radius	3.0 mile radisu	5.0 mile radius	Old Town	Fairfax City	Fairfax County (ex. city)
Less than $25,000	8.6%	6.8%	6.1%	10.4%	7.5%	7.0%
Less than $50,000	20.5%	15.7%	14.5%	21.6%	18.4%	17.4%
More than $75,000	64.7%	71.2%	73.1%	62.8%	66.2%	69.5%
More than $100,000	51.0%	57.4%	60.3%	49.3%	51.7%	56.9%
Access to and internet use in past 30 days						
Any internet use	80.2%	90.9%	92.2%	46.8%	91.1%	92.0%
Accessed from home	77.8%	88.4%	90.0%	45.6%	88.4%	89.6%
Accessed from work	42.8%	51.0%	51.9%	25.4%	49.9%	51.6%
Accessed from school/library	11.6%	13.9%	13.8%	6.4%	13.7%	14.0%
Accessed from other	30.2%	35.4%	36.3%	18.1%	34.8%	36.7%
Access internet via computer	76.4%	86.7%	88.3%	44.9%	86.4%	87.6%
Access internet via cell phone	56.2%	66.7%	68.1%	34.0%	64.4%	68.6%
Made personal purchase via internet	50.4%	59.0%	61.4%	30.6%	56.2%	59.9%
Made business purchase via internet	13.1%	15.7%	16.3%	8.2%	14.9%	16.0%
Online 10+ hours a day	3.7%	4.4%	4.1%	2.2%	4.4%	4.2%
Online 5.0 to 9.9 hours a day	11.2%	13.0%	13.0%	7.0%	12.4%	12.6%
Online 2.0 to 4.9 hours a day	20.9%	25.1%	25.4%	12.4%	24.4%	25.5%
Online 1.0 to 1.9 hours a day	17.7%	19.5%	19.7%	9.9%	20.3%	20.0%
Online 0.5 to 0.9 hours a day	12.6%	14.0%	14.7%	7.5%	13.7%	14.3%
Online < 0.5 hours a day	8.7%	9.0%	9.2%	5.0%	9.4%	9.3%
Pets and products						
Households owns any pet	52.6%	51.2%	51.6%	50.5%	52.5%	51.5%
Households owns any cat	21.1%	20.9%	21.1%	20.3%	21.2%	20.5%
Households owns any dog	36.3%	35.3%	35.6%	33.7%	36.4%	35.8%
Cats per sq mi	295	281	246	296	300	205
Dogs per sq mile	508	474	416	491	515	358

Main Street at Chain Bridge Road	1.0 mile radius	3.0 mile radisu	5.0 mile radius	Old Town	Fairfax City	Fairfax County (ex. city)
Business & Employment Data						
Total businesses	1,964	5,287	10,836	1,157	2,822	40,923
Total employees	31,564	89,653	190,760	12,862	31,002	650,613
Employees per Sq Mi	10,047	3,171	2,429	24,499	4,876	1,602
Employee/Residential Population Ratio	2.18	0.78	0.71	4.21	1.27	0.58
Retail Trade: Businesses	239	843	1,886	115	492	7,459
Businesses as a % of Total	12%	16%	17%	10%	17%	18%
Businesses per Sq Mi	76.1	29.8	24.0	219.0	77.4	18.4
Employees	3,254	13,202	35,405	1,550	7,265	140,404
Employees per Sq Mi	1,036	467	451	2,952	1,143	346
Employees as a % of Total	10%	15%	19%	12%	23%	22%
Finance, Ins., Real Estate Businesses	264	724	1,330	153	382	61,549
Businesses as a % of Total	13%	14%	12%	13%	14%	150%
Employees	1,747	5,435	10,407	1,019	2,612	61,549
Employees as a % of Total	6%	6%	5%	8%	8%	9%
Service Businesses	1,043	2,503	5,037	617	1,371	17,808
Businesses as a % of Total	53%	47%	46%	53%	49%	44%
Employees	20,219	48,144	105,202	5,492	13,513	316,262
Employees as a % of Total	64%	54%	55%	43%	44%	49%
Government: Businesses	99	180	272	86	83	464
Businesses as a % of Total	5%	3%	3%	7%	3%	1%
Employees	3,799	8,990	14,070	3,355	2,717	22,980
Employees as a % of Total	12%	10%	7%	26%	9%	4%
Estimated "Office Workers"	18,307	51,999	110,641	7,460	17,981	377,356
Estimated Office Worker Spending	$105,815,154	$300,552,717	$639,503,824	$43,118,569	$103,931,105	$2,181,115,021

Main Street at Chain Bridge Road	1.0 mile radius	3.0 mile radisu	5.0 mile radius	Old Town	Fairfax City	Fairfax County (ex. city)
Medical Expenditures						
Physician Services	$1,994,538	$17,708,897	$45,006,142	$309,979	$3,537,968	$183,413,532
Dental services	$3,061,697	$26,224,660	$66,915,803	$473,300	$5,384,024	$270,709,668
Eyecare services	$471,626	$4,109,761	$10,505,222	$72,251	$828,696	$42,639,047
Physcian spending per Household	$453.82	$466	$491	$405	$394	$452
Physcian spending per Sq Mile	$634,880	$626,323	$573,035	$590,436	$556,459	$451,757
Dental spending per Houshold	$696.63	$691	$730	$619	$599	$667
Dental spending per Sq Mile	$974,566	$927,505	$851,996	$901,524	$846,811	$666,773
Eyecare spending per Household	$107	$108	$115	$94	$92	$105
Eyecare spending per Sq Mile	$150,123	$145,353	$133,756	$137,621	$130,339	$105,022

Supply & Demand – Total Retail Trade & Food						
Total Retail Trade & Food – Demand	$316,595,339	$2,753,429,747	$7,088,276,869	$1,545,917,335	$6,189,852,628	$18,347,042,689
Total Retail Trade & Food – Supply	$664,836,175	$3,035,307,271	$6,390,198,295	$1,760,804,088	$6,034,672,639	$16,339,564,887
Total Retail Trade & Food – Retail Leakag	($348,240,836)	($281,877,524)	$698,078,574	($214,886,753)	$155,179,989	$2,007,477,802
Total Retail Trade & Food – Businesses	260	1,440	2,649	857	2,432	6,644
Consumer Demand per HH	$72,035	$72,512	$77,312	$2,020,807	$688,526	$45,194
Retail Sales per HH	$151,271	$79,935	$69,698	$2,301,705	$671,265	$40,249
Retail Leakage per HH	($79,236)	($7,423)	$7,614	($280,898)	$17,261	$4,945
HHs per Retail Business	17	26	35	1	4	61
Retailers per Sq Mile	83	51	34	1,632	383	16
Avg Sales per Retailer/Year	$2,557,062	$2,107,852	$2,412,306	$2,054,614	$2,481,362	$2,459,296
Consumer Demand per Sq Mile	$100,775,191	$97,382,429	$90,250,533	$2,944,604,448	$973,553,417	$45,189,760
Retail Sales per Sq Mile	$211,623,432	$107,351,784	$81,362,341	$3,353,912,549	$949,146,373	$40,245,234
Retail Leakage per Sq Mile	($110,848,242)	($9,969,355)	$8,888,192	($409,308,101)	$24,407,045	$4,944,527

Main Street at Chain Bridge Road	1.0 mile radius	3.0 mile radisu	5.0 mile radius	Old Town	Fairfax City	Fairfax County (ex. city)
Supply & Demand - Retail Trade ONLY						
Total Retail Trade – Demand	$284,535,776	$2,477,321,805	$6,374,090,289	$1,391,330,992	$5,567,118,825	$16,485,114,829
Total Retail Trade – Supply	$589,344,003	$2,752,474,034	$5,854,730,504	$1,582,009,631	$5,541,215,541	$14,993,772,275
Total Retail Trade – Retail Leakage	($304,808,227)	($275,152,229)	$519,359,785	($190,678,639)	$25,903,284	$1,491,342,554
Total Retail Trade – No of Businesses	167	972	1,801	589	1,644	4,618
Consumer Demand per HH	$64,741	$65,241	$69,522	$1,818,733	$619,257	$40,608
Retail Sales per HH	$134,094	$72,487	$63,858	$2,067,986	$616,375	$36,934
Retail Leakage per HH	($69,353)	($7,246)	$5,665	($249,253)	$2,881	$3,674
HHs per Retail Business	26	39	51	1	5	88
Business per Sq Mile	53	34	23	1,122	259	11
Avg Sales per Retailer/Year	$3,529,006	$2,831,763	$3,250,822	$2,685,925	$3,370,569	$3,246,811
Consumer Demand per Sq Mile	$90,570,339	$87,617,131	$81,157,248	$2,650,154,270	$875,608,497	$40,603,731
Retail Sales per Sq Mile	$187,593,584	$97,348,628	$74,544,570	$3,013,351,678	$871,534,373	$36,930,474
Retail Leakage per Sq Mile	($97,023,245)	($9,731,497)	$6,612,679	($363,197,408)	$4,074,125	$3,673,258
Supply & Demand Food & Drink ONLY						
Total Food & Drink – Demand	$32,059,563	$276,107,942	$714,186,580	$154,586,343	$622,733,803	$1,861,927,861
Total Food & Drink – Supply	$75,492,172	$282,833,237	$535,467,791	$178,794,456	$493,457,097	$1,405,792,612
Total Food & Drink – Retail Leakage	($43,432,609)	($6,725,295)	$178,718,789	($24,208,113)	$129,276,706	$456,135,249
Total Food & Drink – No of Businesses	93	469	848	268	788	2,026
Consumer Demand per HH	$7,295	$7,271	$7,790	$202,074	$69,270	$4,586
Retail Sales per HH	$17,177	$7,448	$5,840	$233,718	$54,890	$3,463
Retail Leakage per HH	($9,882)	($177)	$1,949	($31,645)	$14,380	$1,124
HHs per Retail Business	47	81	108	3	11	200
Business per Sq Mile	30	17	11	510	124	5
Avg Sales per Retailer/Year	$811,744	$603,056	$631,448	$667,143	$626,215	$693,876
Consumer Demand per Sq Mile	$10,204,852	$9,765,298	$9,093,285	$294,450,177	$97,944,920	$4,586,029
Retail Sales per Sq Mile	$24,029,848	$10,003,156	$6,817,772	$340,560,869	$77,612,000	$3,462,543
Retail Leakage per Sq Mile	($13,824,996)	($237,858)	$2,275,513	($46,110,691)	$20,332,920	$1,123,486

Main Street at Chain Bridge Road	1.0 mile radius	3.0 mile radisu	5.0 mile radius	Old Town	Fairfax City	Fairfax County (ex. city)
Supply & Demand by Retail Category						
Automobile Dealers - Consumer Demand	$53,569,207	$514,591,200	$1,298,169,052	$8,543,321	$95,920,930	$5,306,386,466
Automobile Dealers - Retail Supply	$254,967,496	$618,003,566	$756,412,270	$88,193,774	$617,004,824	$3,873,551,199
Automobile Dealers - Leakage / Surplus	($201,398,289)	($103,412,366)	$541,756,782	($79,650,453)	($521,083,894)	$1,432,835,267
Automobile Dealers - No of Businesses	12	33	43	3	32	127
Retail Leakage per HH	($45,824)	($2,723)	$5,909	($104,118)	($57,963)	$3,529
Retail Leakage per Sq Mi	($64,106,917)	($3,657,456)	$6,897,845	($151,715,149)	($81,957,203)	$3,529,151
HHs per Retail Business	366	1,151	2,132	255	281	3,197
Retailers per Sq Mile	3.8	1.2	0.5	5.7	5.0	0.3
Avg Sales per Retailer/Year	$21,247,291	$18,727,381	$17,590,983	$29,397,925	$19,281,401	$30,500,403
Other MV Dealers - Consumer Demand	$7,016,103	$64,732,764	$165,938,445	$1,121,742	$12,269,851	$675,119,821
Other MV Dealers - Retail Supply	$12,676,719	$28,883,199	$32,348,539	$5,187,254	$27,725,685	$60,952,845
Other MV Dealers - Leakage / Surplus	($5,660,616)	$35,849,565	$133,589,906	($4,065,512)	($15,455,834)	$614,166,976
Other MV Dealers - No of Businesses	2	5	7	1	4	31
Retail Leakage per HH	($1,288)	$944	$1,457	($5,314)	($1,719)	$1,513
Retail Leakage per Sq Mi	($1,801,826)	$1,267,916	$1,700,916	($7,743,832)	($2,430,927)	$1,512,727
HHs per Retail Business	2,198	7,594	13,098	765	2,248	13,096
Retailers per Sq Mile	0.6	0.2	0.1	1.9	0.6	0.1
Avg Sales per Retailer/Year	6,338,360	$5,776,640	$4,621,220	$5,187,254	$6,931,421	$1,966,221
Auto Parts & Accessories - Consumer Der	$4,080,433	$38,085,329	$96,180,803	$654,089	$7,238,136	$391,962,788
Auto Parts & Accessories - Retail Supply	$5,757,159	$19,055,263	$35,082,531	$3,435,336	$14,421,273	$118,683,598
Auto Parts & Accessories - Leakage / Surp	($1,676,726)	$19,030,066	$61,098,272	($2,781,247)	($7,183,137)	$273,279,190
Auto Parts & Accessories - No of Business	7	21	39	4	16	143
Retail Leakage per HH	($382)	$501	$666	($3,636)	($799)	$673
Retail Leakage per Sq Mi	($533,717)	$673,049	$777,926	($5,297,613)	($1,129,779)	$673,101
HHs per Retail Business	628	1,808	2,351	191	562	2,839
Retailers per Sq Mile	2.2	0.7	0.5	7.6	2.5	0.4
Avg Sales per Retailer/Year	$822,451	$907,393	$899,552	$858,834	$901,330	$829,955

Main Street at Chain Bridge Road	1.0 mile radius	3.0 mile radisu	5.0 mile radius	Old Town	Fairfax City	Fairfax County (ex. city)
Furniture Stores - Consumer Demand	$5,162,804	$50,093,029	$126,950,819	$832,658	$9,182,722	$519,212,463
Furniture Stores - Retail Supply	$2,551,801	$22,868,270	$47,379,187	$0	$12,222,464	$320,535,664
Furniture Stores - Leakage / Surplus	$2,611,003	$27,224,759	$79,571,632	$832,658	($3,039,742)	$198,676,799
Furniture Stores - No of Businesses	3	20	33	0	12	152
Retail Leakage per HH	$594	$717	$868	$1,088	($338)	$489
Retail Leakage per Sq Mi	$831,106	$962,877	$1,013,135	$1,586,015	($478,097)	$489,352
HHs per Retail Business	1,465	1,899	2,778	#DIV/0!	749	2,671
Retailers per Sq Mile	1.0	0.7	0.4	0.0	1.9	0.4
Avg Sales per Retailer/Year	$850,600	$1,143,414	$1,435,733	#DIV/0!	$1,018,539	$2,108,787
Home Furnishings - Consumer Demand	$3,518,970	$33,447,399	$84,932,598	$563,184	$6,246,260	$345,613,376
Home Furnishings - Retail Supply	$9,688,311	$31,177,490	$61,267,223	$5,624,950	$25,214,335	$175,907,875
Home Furnishings - Leakage / Surplus	($6,169,341)	$2,269,909	$23,665,375	($5,061,766)	($18,968,075)	$169,705,501
Home Furnishings - No of Businesses	4	28	66	2	17	215
Retail Leakage per HH	($1,404)	$60	$258	($6,617)	($2,110)	$418
Retail Leakage per Sq Mi	($1,963,758)	$80,281	$301,316	($9,641,459)	($2,983,340)	$417,994
HHs per Retail Business	1,099	1,356	1,389	383	529	1,888
Retailers per Sq Mile	1.3	1.0	0.8	3.8	2.7	0.5
Avg Sales per Retailer/Year	$2,422,078	$1,113,482	$928,291	$2,812,475	$1,483,196	$818,176
Electronic/Appliance - Consumer Demand	$12,303,407	$116,222,841	$293,871,906	$1,978,906	$21,894,919	$1,198,035,491
Electronic/Appliance - Retail Supply	$60,340,281	$188,629,828	$426,664,222	$29,823,064	$106,492,437	$3,409,464,846
Electronic/Appliance - Leakage / Surplus	($48,036,874)	($72,406,987)	($132,792,316)	($27,844,158)	($84,597,518)	($2,211,429,355)
Electronic/Appliance - No of Businesses	28	91	197	13	42	998
Retail Leakage per HH	($10,930)	($1,907)	($1,448)	($36,398)	($9,410)	($5,447)
Retail Leakage per Sq Mi	($15,290,576)	($2,560,867)	($1,690,760)	($53,036,491)	($13,305,681)	($5,446,870)
HHs per Retail Business	157	417	465	59	214	407
Retailers per Sq Mile	8.9	3.2	2.5	24.8	6.6	2.5
Avg Sales per Retailer/Year	$2,155,010	$2,072,855	$2,165,808	$2,294,082	$2,535,534	$3,416,297

Main Street at Chain Bridge Road	1.0 mile radius	3.0 mile radisu	5.0 mile radius	Old Town	Fairfax City	Fairfax County (ex. city)
Bldg Materials - Consumer Demand	$14,281,579	$130,298,264	$335,353,302	$2,325,155	$24,418,501	$1,352,686,252
Bldg Materials - Retail Supply	$17,699,773	$38,954,030	$117,237,759	$14,481,740	$27,913,688	$465,631,536
Bldg Materials - Leakage / Surplus	($3,418,194)	$91,344,234	$218,115,543	($12,156,585)	($3,495,187)	$887,054,716
Bldg Materials - No of Businesses	10	25	58	6	14	288
Retail Leakage per HH	($778)	$2,406	$2,379	($15,891)	($389)	$2,185
Retail Leakage per Sq Mi	($1,088,042)	$3,230,634	$2,777,127	($23,155,400)	($549,731)	$2,184,864
HHs per Retail Business	440	1,519	1,581	128	642	1,410
Retailers per Sq Mile	3.2	0.9	0.7	11.4	2.2	0.7
Avg Sales per Retailer/Year	$1,769,977	$1,558,161	$2,021,341	$2,413,623	$1,993,835	$1,616,776
Lawn & Garden - Consumer Demand	$1,235,430	$11,480,448	$29,495,380	$191,714	$2,179,359	$119,339,028
Lawn & Garden - Retail Supply	$0	$18,432,243	$38,857,813	$0	$1,746,537	$64,046,395
Lawn & Garden - Leakage / Surplus	$1,235,430	($6,951,795)	($9,362,433)	$191,714	$432,822	$55,292,633
Lawn & Garden - No of Businesses	0	6	17	0	2	45
Retail Leakage per HH	$281	($183)	($102)	$251	$48	$136
Retail Leakage per Sq Mi	$393,249	($245,869)	($119,206)	$365,170	$68,075	$136,189
HHs per Retail Business	0.0	6328.7	5393.2	0.0	4495.0	9021.4
Retailers per Sq Mile	0.0	0.2	0.2	0.0	0.3	0.1
Avg Sales per Retailer/Year	$0	$3,072,041	$2,285,754	$0	$873,269	$1,423,253
Grocery Store - Consumer Demand	$50,463,147	$476,272,041	$1,193,359,536	$8,094,527	$90,444,660	$4,885,447,031
Grocery Store - Retail Supply	$44,220,604	$296,822,096	$658,746,475	$11,418,266	$108,876,191	$2,595,382,670
Grocery Store - Leakage / Surplus	$6,242,543	$179,449,945	$534,613,061	($3,323,739)	($18,431,531)	$2,290,064,361
Grocery Store - No of Businesses	12	39	76	5	26	360
Retail Leakage per HH	$1,420	$4,726	$5,831	($4,345)	($2,050)	$5,641
Retail Leakage per Sq Mi	$1,987,059	$6,346,729	$6,806,889	($6,330,931)	($2,898,951)	$5,640,553
HHs per Retail Business	366	974	1,206	153	346	1,128
Retailers per Sq Mile	3.8	1.4	1.0	9.5	4.1	0.9
Avg Sales per Retailer/Year	$3,685,050	$7,610,823	$8,667,717	$2,283,653	$4,187,546	$7,209,396

Main Street at Chain Bridge Road	1.0 mile radius	3.0 mile radisu	5.0 mile radius	Old Town	Fairfax City	Fairfax County (ex. city)
Specialty Food - Consumer Demand	$1,566,255	$14,791,702	$37,084,909	$251,191	$2,809,678	$151,839,303
Specialty Food - Retail Supply	$1,773,350	$9,205,741	$36,274,076	$637,032	$4,499,888	$80,045,985
Specialty Food - Leakage / Surplus	($207,095)	$5,585,961	$810,833	($385,841)	($1,690,210)	$71,793,318
Specialty Food - No of Businesses	5	20	39	2	12	114
Retail Leakage per HH	($47)	$147	$9	($504)	($188)	$177
Retail Leakage per Sq Mi	($65,920)	$197,562	$10,324	($734,935)	($265,840)	$176,831
HHs per Retail Business	879	1,899	2,351	383	749	3,561
Retailers per Sq Mile	1.6	0.7	0.5	3.8	1.9	0.3
Avg Sales per Retailer/Year	$354,670	$460,287	$930,105	$318,516	$374,991	$702,158
Liquor Stores - Consumer Demand	$2,198,511	$20,777,456	$52,507,867	$353,677	$3,912,566	$213,194,114
Liquor Stores - Retail Supply	$4,728,547	$14,396,367	$21,857,990	$3,439,839	$12,128,734	$104,497,348
Liquor Stores - Leakage / Surplus	($2,530,036)	$6,381,089	$30,649,877	($3,086,162)	($8,216,168)	$108,696,766
Liquor Stores - No of Businesses	2	8	14	1	5	51
Retail Leakage per HH	($576)	$168	$334	($4,034)	($914)	$268
Retail Leakage per Sq Mi	($805,334)	$225,684	$390,245	($5,878,404)	($1,292,257)	$267,726
HHs per Retail Business	2,198	4,747	6,549	765	1,798	7,960
Retailers per Sq Mile	0.6	0.3	0.2	1.9	0.8	0.1
Avg Sales per Retailer/Year	$2,364,274	$1,799,546	$1,561,285	$3,439,839	$2,425,747	$2,048,968
Health & Personal Care - Consumer Dem	$15,221,476	$141,821,429	$358,813,901	$2,418,042	$26,845,509	$1,463,485,551
Health & Personal Care - Retail Supply	$21,259,242	$78,292,635	$227,823,066	$12,842,353	$61,973,846	$803,332,306
Health & Personal Care - Leakage / Surpl	($6,037,766)	$63,528,794	$130,990,835	($10,424,311)	($35,128,337)	$660,153,245
Health & Personal Care - No of Businesse	19	52	128	10	37	389
Retail Leakage per HH	($1,374)	$1,673	$1,429	($13,627)	($3,907)	$1,626
Retail Leakage per Sq Mi	($1,921,876)	$2,246,866	$1,667,823	($19,855,830)	($5,525,061)	$1,625,993
HHs per Retail Business	231	730	716	77	243	1,044
Retailers per Sq Mile	6.0	1.8	1.6	19.0	5.8	1.0
Avg Sales per Retailer/Year	$1,118,907	$1,505,628	$1,779,868	$1,284,235	$1,674,969	$2,065,122

Main Street at Chain Bridge Road	1.0 mile radius	3.0 mile radisu	5.0 mile radius	Old Town	Fairfax City	Fairfax County (ex. city)
Gasoline Stations - Consumer Demand	$18,868,503	$179,373,023	$449,413,552	$3,010,064	$33,931,652	$1,841,977,650
Gasoline Stations - Retail Supply	$17,337,903	$83,627,148	$200,409,668	$944,370	$61,883,934	$711,252,611
Gasoline Stations - Leakage / Surplus	$1,530,600	$95,745,875	$249,003,884	$2,065,694	($27,952,282)	$1,130,725,039
Gasoline Stations - No of Businesses	6	28	58	1	21	214
Retail Leakage per HH	$348	$2,521	$2,716	$2,700	($3,109)	$2,785
Retail Leakage per Sq Mi	$487,204	$3,386,310	$3,170,409	$3,934,655	($4,396,395)	$2,785,037
HHs per Retail Business	733	1,356	1,581	765	428	1,897
Retailers per Sq Mile	1.9	1.0	0.7	1.9	3.3	0.5
Avg Sales per Retailer/Year	$2,889,651	$2,986,684	$3,455,339	$944,370	$2,946,854	$3,323,610
Clothing Stores - Consumer Demand	$10,670,507	$102,174,681	$257,327,554	$1,722,744	$19,118,366	$1,051,244,534
Clothing Stores - Retail Supply	$5,479,371	$35,707,625	$159,206,246	$1,661,200	$11,312,656	$677,623,680
Clothing Stores - Leakage / Surplus	$5,191,136	$66,467,056	$98,121,308	$61,544	$7,805,710	$373,620,854
Clothing Stores - No of Businesses	11	43	130	5	21	504
Retail Leakage per HH	$1,181	$1,750	$1,070	$80	$868	$920
Retail Leakage per Sq Mi	$1,652,386	$2,350,786	$1,249,316	$117,227	$1,227,699	$920,248
HHs per Retail Business	400	883	705	153	428	805
Retailers per Sq Mile	3.5	1.5	1.7	9.5	3.3	1.2
Avg Sales per Retailer/Year	$498,125	$830,410	$1,224,663	$332,240	$538,698	$1,344,491
Shoe Stores - Consumer Demand	$1,653,848	$15,825,697	$39,585,734	$267,731	$2,976,365	$162,482,834
Shoe Stores - Retail Supply	$1,975,525	$7,465,202	$24,305,125	$1,467,900	$5,884,057	$77,054,822
Shoe Stores - Leakage / Surplus	($321,677)	$8,360,495	$15,280,609	($1,200,169)	($2,907,692)	$85,428,012
Shoe Stores - No of Businesses	4	8	25	3	6	76
Retail Leakage per HH	($73)	$220	$167	($1,569)	($323)	$210
Retail Leakage per Sq Mi	($102,393)	$295,691	$194,558	($2,286,036)	($457,328)	$210,414
HHs per Retail Business	1,099	4,747	3,667	255	1,498	5,342
Retailers per Sq Mile	1.3	0.3	0.3	5.7	0.9	0.2
Avg Sales per Retailer/Year	$493,881	$933,150	$972,205	$489,300	$980,676	$1,013,879

Main Street at Chain Bridge Road	1.0 mile radius	3.0 mile radisu	5.0 mile radius	Old Town	Fairfax City	Fairfax County (ex. city)
Jewelry & Leather - Consumer Demand	$2,648,987	$25,354,800	$64,399,396	$431,039	$4,663,439	$261,560,407
Jewelry & Leather - Retail Supply	$3,088,446	$9,807,404	$35,747,944	$1,544,421	$4,335,540	$124,262,882
Jewelry & Leather - Leakage / Surplus	($439,459)	$15,547,396	$28,651,452	($1,113,382)	$327,899	$137,297,525
Jewelry & Leather - No of Businesses	4	13	39	2	6	126
Retail Leakage per HH	($100)	$409	$313	($1,455)	$36	$338
Retail Leakage per Sq Mi	($139,884)	$549,875	$364,801	($2,120,728)	$51,573	$338,171
HHs per Retail Business	1,099	2,921	2,351	383	1,498	3,222
Retailers per Sq Mile	1.3	0.5	0.5	3.8	0.9	0.3
Avg Sales per Retailer/Year	$772,112	$754,416	$916,614	$772,211	$722,590	$986,213
Sport Gds & Hobby - Consumer Demand	$6,434,061	$60,849,574	$153,419,124	$1,047,429	$11,426,598	$627,488,724
Sport Gds & Hobby - Retail Supply	$9,544,497	$47,397,186	$128,291,048	$5,524,517	$24,914,818	$341,441,568
Sport Gds & Hobby - Leakage / Surplus	($3,110,436)	$13,452,388	$25,128,076	($4,477,088)	($13,488,220)	$286,047,156
Sport Gds & Hobby - No of Businesses	10	31	72	6	19	237
Retail Leakage per HH	($708)	$354	$274	($5,852)	($1,500)	$705
Retail Leakage per Sq Mi	($990,080)	$475,780	$319,940	($8,527,787)	($2,121,456)	$704,550
HHs per Retail Business	440	1,225	1,273	128	473	1,713
Retailers per Sq Mile	3.2	1.1	0.9	11.4	3.0	0.6
Avg Sales per Retailer/Year	$954,450	$1,528,941	$1,781,820	$920,753	$1,311,306	$1,440,682
Books & Music - Consumer Demand	$1,563,404	$14,988,404	$37,791,694	$254,612	$2,778,846	$154,379,765
Books & Music - Retail Supply	$1,389,772	$3,909,660	$19,984,085	$427,251	$2,354,037	$51,468,562
Books & Music - Leakage / Surplus	$173,632	$11,078,744	$17,807,609	($172,639)	$424,809	$102,911,203
Books & Music - No of Businesses	3	10	23	1	5	57
Retail Leakage per HH	$40	$292	$194	($226)	$47	$253
Retail Leakage per Sq Mi	$55,269	$391,829	$226,733	($328,836)	$66,815	$253,476
HHs per Retail Business	1,465	3,797	3,986	765	1,798	7,122
Retailers per Sq Mile	1.0	0.4	0.3	1.9	0.8	0.1
Avg Sales per Retailer/Year	$463,257	$390,966	$868,873	$427,251	$470,807	$902,957

Main Street at Chain Bridge Road	1.0 mile radius	3.0 mile radisu	5.0 mile radius	Old Town	Fairfax City	Fairfax County (ex. city)
Department Stores - Consumer Demand	$41,726,017	$398,373,033	$1,004,312,985	$6,719,573	$74,548,997	$4,105,692,230
Department Stores - Retail Supply	$19,797,699	$191,690,311	$627,669,482	$4,433,245	$97,398,187	$1,996,031,517
Department Stores - Leakage / Surplus	$21,928,318	$206,682,722	$376,643,503	$2,286,328	($22,849,190)	$2,109,660,713
Department Stores - No of Businesses	1	8	21	1	4	84
Retail Leakage per HH	$4,989	$5,443	$4,108	$2,989	($2,542)	$5,197
Retail Leakage per Sq Mi	$6,979,984	$7,309,889	$4,795,563	$4,354,910	($3,593,770)	$5,196,209
HHs per Retail Business	4,395	4,747	4,366	765	2,248	4,833
Retailers per Sq Mile	0.3	0.3	0.3	1.9	0.6	0.2
Avg Sales per Retailer/Year	$19,797,699	$23,961,289	$29,889,023	$4,433,245	$24,349,547	$23,762,280
General Merchandise - Consumer Deman	$12,449,910	$117,571,976	$294,825,928	$1,996,645	$22,310,807	$1,206,720,812
General Merchandise - Retail Supply	$1,357,686	$11,739,494	$246,392,114	$529,571	$9,862,427	$728,818,171
General Merchandise - Leakage / Surplus	$11,092,224	$105,832,482	$48,433,814	$1,467,074	$12,448,380	$477,902,641
General Merchandise - No of Businesses	2	10	26	1	7	91
Retail Leakage per HH	$2,524	$2,787	$528	$1,918	$1,385	$1,177
Retail Leakage per Sq Mi	$3,530,756	$3,743,050	$616,677	$2,794,427	$1,957,908	$1,177,100
HHs per Retail Business	2,198	3,797	3,526	765	1,284	4,461
Retailers per Sq Mile	0.6	0.4	0.3	1.9	1.1	0.2
Avg Sales per Retailer/Year	$678,843	$1,173,949	$9,476,620	$529,571	$1,408,918	$8,008,991
Florists - Consumer Demand	$530,921	$4,944,060	$12,728,479	$82,273	$936,345	$51,421,486
Florists - Retail Supply	$402,670	$2,721,384	$6,174,220	$309,546	$701,375	$26,899,352
Florists - Leakage / Surplus	$128,251	$2,222,676	$6,554,259	($227,273)	$234,970	$24,522,134
Florists - No of Businesses	2	11	22	2	5	84
Retail Leakage per HH	$29	$59	$71	($297)	$26	$60
Retail Leakage per Sq Mi	$40,823	$78,611	$83,451	($432,901)	$36,957	$60,399
HHs per Retail Business	2,198	3,452	4,167	383	1,798	4,833
Retailers per Sq Mile	0.6	0.4	0.3	3.8	0.8	0.2
Avg Sales per Retailer/Year	$201,335	$247,399	$280,646	$154,773	$140,275	$320,230

Main Street at Chain Bridge Road	1.0 mile radius	3.0 mile radisu	5.0 mile radius	Old Town	Fairfax City	Fairfax County (ex. city)
Office Supply & Gifts - Consumer Demanc	$2,796,085	$26,320,786	$66,479,612	$448,570	$4,962,306	$271,355,759
Office Supply & Gifts - Retail Supply	$5,801,362	$13,887,790	$37,823,617	$3,835,739	$8,870,614	$142,821,270
Office Supply & Gifts - Leakage / Surplus	($3,005,277)	$12,432,996	$28,655,995	($3,387,169)	($3,908,308)	$128,534,489
Office Supply & Gifts - No of Businesses	4	16	55	1	9	204
Retail Leakage per HH	($684)	$327	$313	($4,428)	($435)	$317
Retail Leakage per Sq Mi	($956,607)	$439,726	$364,859	($6,451,750)	($614,707)	$316,587
HHs per Retail Business	1,099	2,373	1,667	765	999	1,990
Retailers per Sq Mile	1.3	0.6	0.7	1.9	1.4	0.5
Avg Sales per Retailer/Year	$1,450,341	$867,987	$687,702	$3,835,739	$985,624	$700,104
Used Merchandise - Consumer Demand	$1,408,432	$13,445,183	$33,927,594	$228,496	$2,504,247	$138,487,472
Used Merchandise - Retail Supply	$558,153	$1,844,253	$4,204,523	$279,361	$1,400,530	$38,540,500
Used Merchandise - Leakage / Surplus	$850,279	$11,600,930	$29,723,071	($50,865)	$1,103,717	$99,946,972
Used Merchandise - No of Businesses	3	6	16	1	4	102
Retail Leakage per HH	$193	$306	$324	($66)	$123	$246
Retail Leakage per Sq Mi	$270,652	$410,298	$378,445	($96,886)	$173,595	$246,175
HHs per Retail Business	1,465	6,329	5,730	765	2,248	3,980
Retailers per Sq Mile	1.0	0.2	0.2	1.9	0.6	0.3
Avg Sales per Retailer/Year	$186,051	$307,376	$262,783	$279,361	$350,133	$377,848
Misc. Retailers - Consumer Demand	$4,556,649	$42,975,306	$108,000,909	$733,309	$8,089,479	$441,023,857
Misc. Retailers - Retail Supply	$4,767,688	$31,518,777	$88,777,153	$1,499,613	$21,907,612	$301,391,810
Misc. Retailers - Leakage / Surplus	($211,039)	$11,456,529	$19,223,756	($766,304)	($13,818,133)	$139,632,047
Misc. Retailers - No of Businesses	7	30	68	4	17	263
Retail Leakage per HH	($48)	$302	$210	($1,002)	($1,537)	$344
Retail Leakage per Sq Mi	($67,176)	$405,191	$244,764	($1,459,627)	($2,173,346)	$343,921
HHs per Retail Business	628	1,266	1,348	191	529	1,544
Retailers per Sq Mile	2.2	1.1	0.9	7.6	2.7	0.6
Avg Sales per Retailer/Year	$681,098	$1,050,626	$1,305,546	$374,903	$1,288,683	$1,145,976

Main Street at Chain Bridge Road	1.0 mile radius	3.0 mile radisu	5.0 mile radius	Old Town	Fairfax City	Fairfax County (ex. city)
Full-Service Dining - Consumer Demand	$17,786,543	$169,757,397	$428,577,468	$2,875,115	$31,739,072	$1,745,625,068
Full-Service Dining - Retail Supply	$39,406,503	$146,209,108	$304,076,177	$21,717,918	$78,599,871	$1,239,714,453
Full-Service Dining - Leakage / Surplus	($21,619,960)	$23,548,289	$124,501,291	($18,842,803)	($46,860,799)	$505,910,615
Full-Service Dining - No of Businesses	59	177	364	32	119	1,452
Retail Leakage per HH	($4,919)	$620	$1,358	($24,631)	($5,213)	$1,246
Retail Leakage per Sq Mi	($6,881,831)	$832,848	$1,585,196	($35,891,053)	($7,370,368)	$1,246,085
HHs per Retail Business	74	215	252	24	76	280
Retailers per Sq Mile	18.8	6.3	4.6	61.0	18.7	3.6
Avg Sales per Retailer/Year	$667,907	$826,040	$835,374	$678,685	$660,503	$853,798
Limited-Serve Dining - Consumer Demanc	$13,398,496	$127,582,270	$320,967,768	$2,163,324	$23,974,930	$1,310,306,478
Limited-Serve Dining - Retail Supply	$34,834,471	$110,833,050	$246,340,773	$17,033,003	$63,365,276	$794,349,609
Limited-Serve Dining - Leakage / Surplus	($21,435,975)	$16,749,220	$74,626,995	($14,869,679)	($39,390,346)	$515,956,869
Limited-Serve Dining - No of Businesses	32	110	233	15	65	794
Retail Leakage per HH	($4,877)	$200,100	$814	($19,437)	($4,382)	$1,271
Retail Leakage per Sq Mi	($6,823,267)	$592,381	$950,178	($28,323,198)	($6,195,399)	$1,270,830
HHs per Retail Business	137	345	393	51	138	511
Retailers per Sq Mile	10.2	3.9	3.0	28.6	10.2	2.0
Avg Sales per Retailer/Year	$1,088,577	$1,007,573	$1,057,257	$1,135,534	$974,850	$1,000,440
Special Food Services - Consumer Demai	$627,487	$6,055,165	$15,501,340	$99,606	$1,128,177	$63,272,622
Special Food Services - Retail Supply	$1,251,198	$1,833,701	$11,001,355	$1,199,066	$1,251,198	$47,586,754
Special Food Services - Leakage / Surplu:	($623,711)	$4,221,464	$4,499,985	($1,099,460)	($123,021)	$15,685,868
Special Food Services - No of Businesses	2	5	19	2	2	67
Retail Leakage per HH	($142)	$111	$49	($1,437)	($14)	$39
Retail Leakage per Sq Mi	($198,533)	$149,303	$57,295	($2,094,210)	($19,349)	$38,635
HHs per Retail Business	2,198	7,594	4,825	383	4,495	6,059
Retailers per Sq Mile	0.6	0.2	0.2	3.8	0.3	0.2
Avg Sales per Retailer/Year	$625,599	$366,740	$579,019	$599,533	$625,599	$710,250

Main Street at Chain Bridge Road	1.0 mile radius	3.0 mile radisu	5.0 mile radius	Old Town	Fairfax City	Fairfax County (ex. city)
Drinking Places - Consumer Demand	$247,037	$2,355,443	$5,893,677	$40,373	$442,745	$23,944,289
Drinking Places - Retail Supply	$0	$562,988	$4,577,586	$0	$0	$24,292,346
Drinking Places - Leakage / Surplus	$247,037	$1,792,455	$1,316,091	$40,373	$442,745	($348,057)
Drinking Places - No of Businesses	0	1	4	0	0	20
Retail Leakage per HH	$56	$47	$14	$53	$49	($1)
Retail Leakage per Sq Mi	$78,634	$63,395	$16,757	$76,901	$69,636	($857)
HHs per Retail Business	#DIV/0!	37,972	22,921	#DIV/0!	#DIV/0!	20,298
Retailers per Sq Mile	0.0	0.0	0.1	0.0	0.0	0.0
Avg Sales per Retailer/Year	#DIV/0!	$562,988	$1,144,397	#DIV/0!	#DIV/0!	$1,214,617

-END OF ANALYSIS-

Presentation



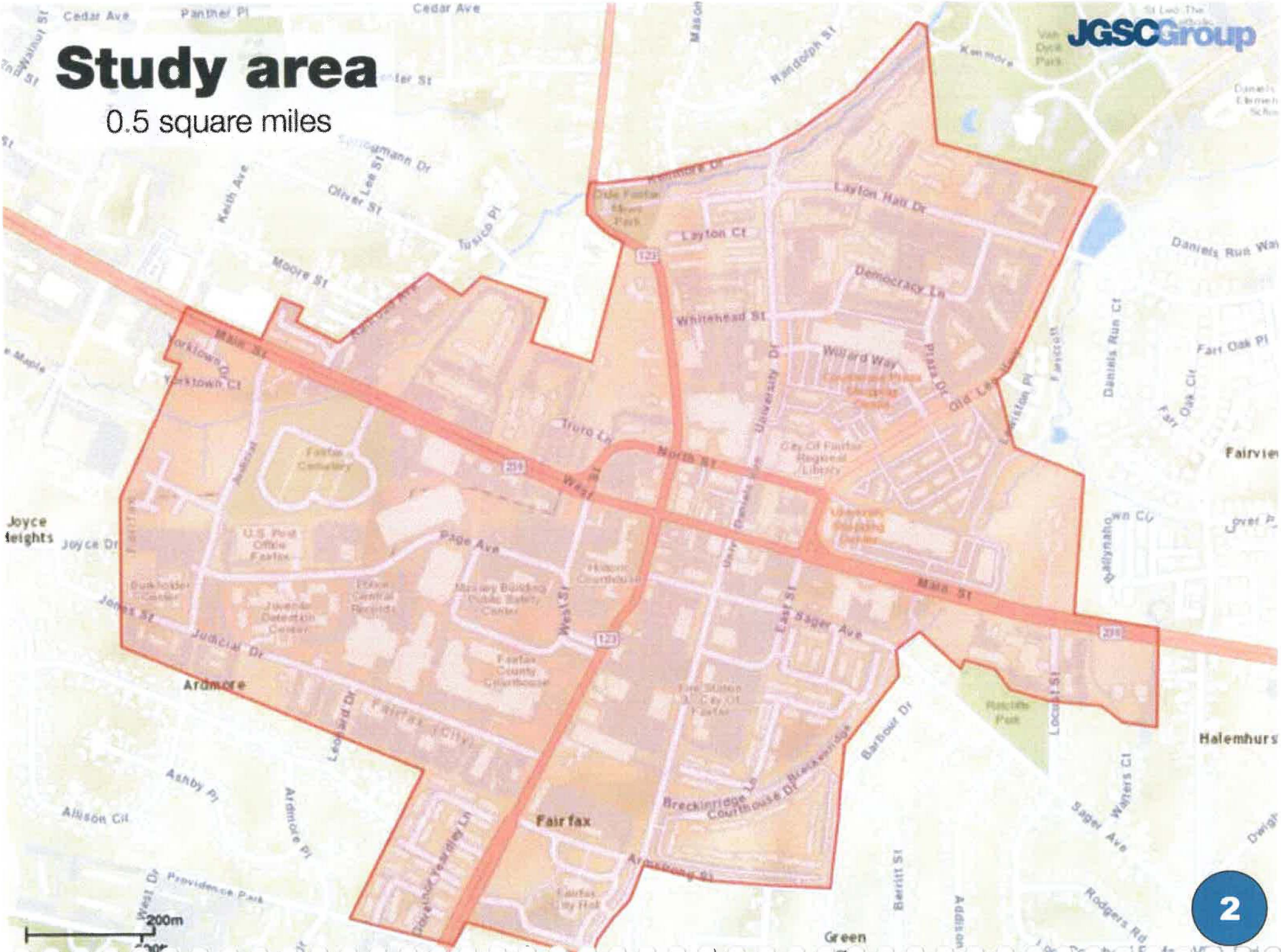
Old Town Fairfax

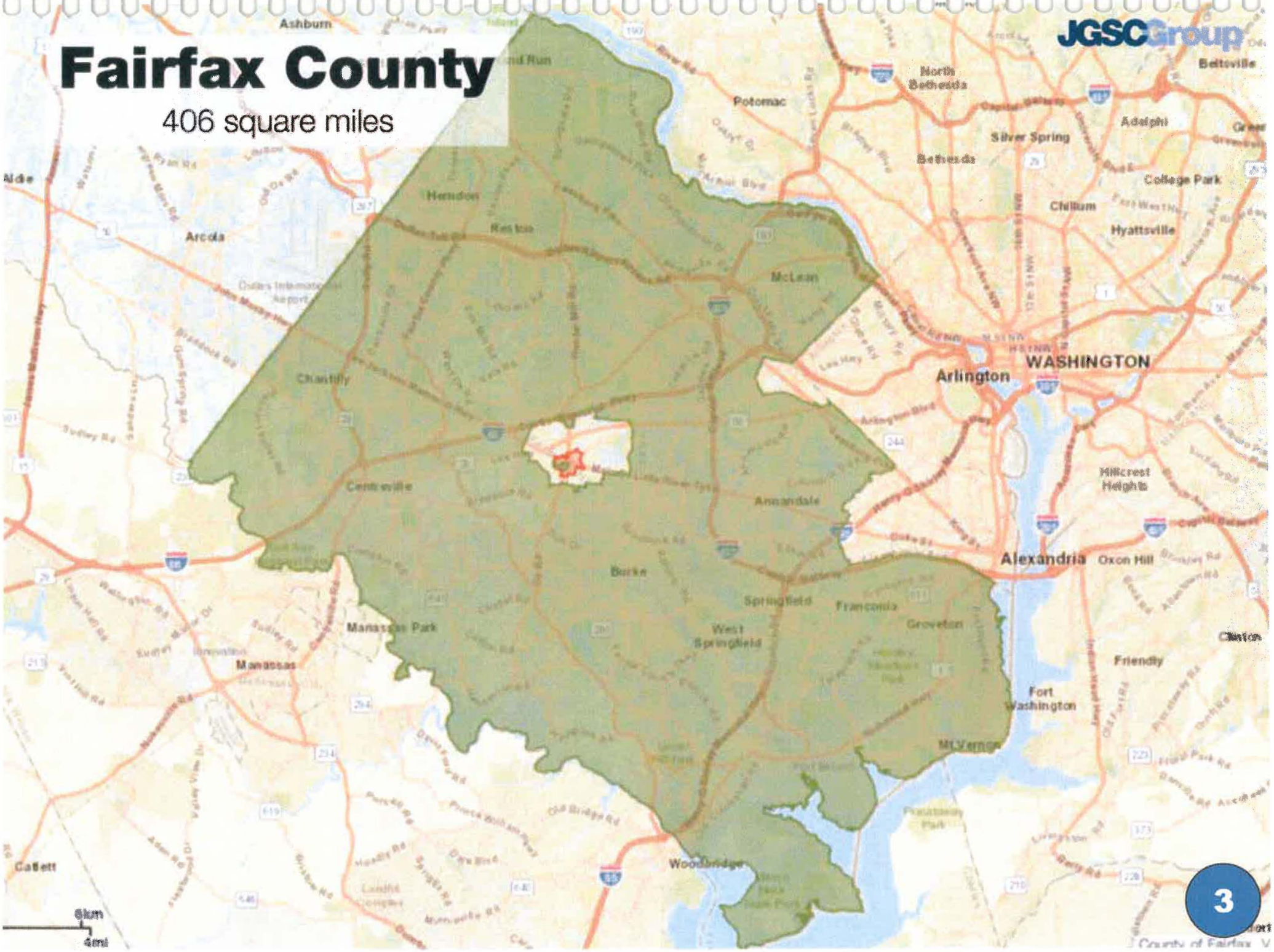
Market analysis & strategies

JGSCGroup

Study area

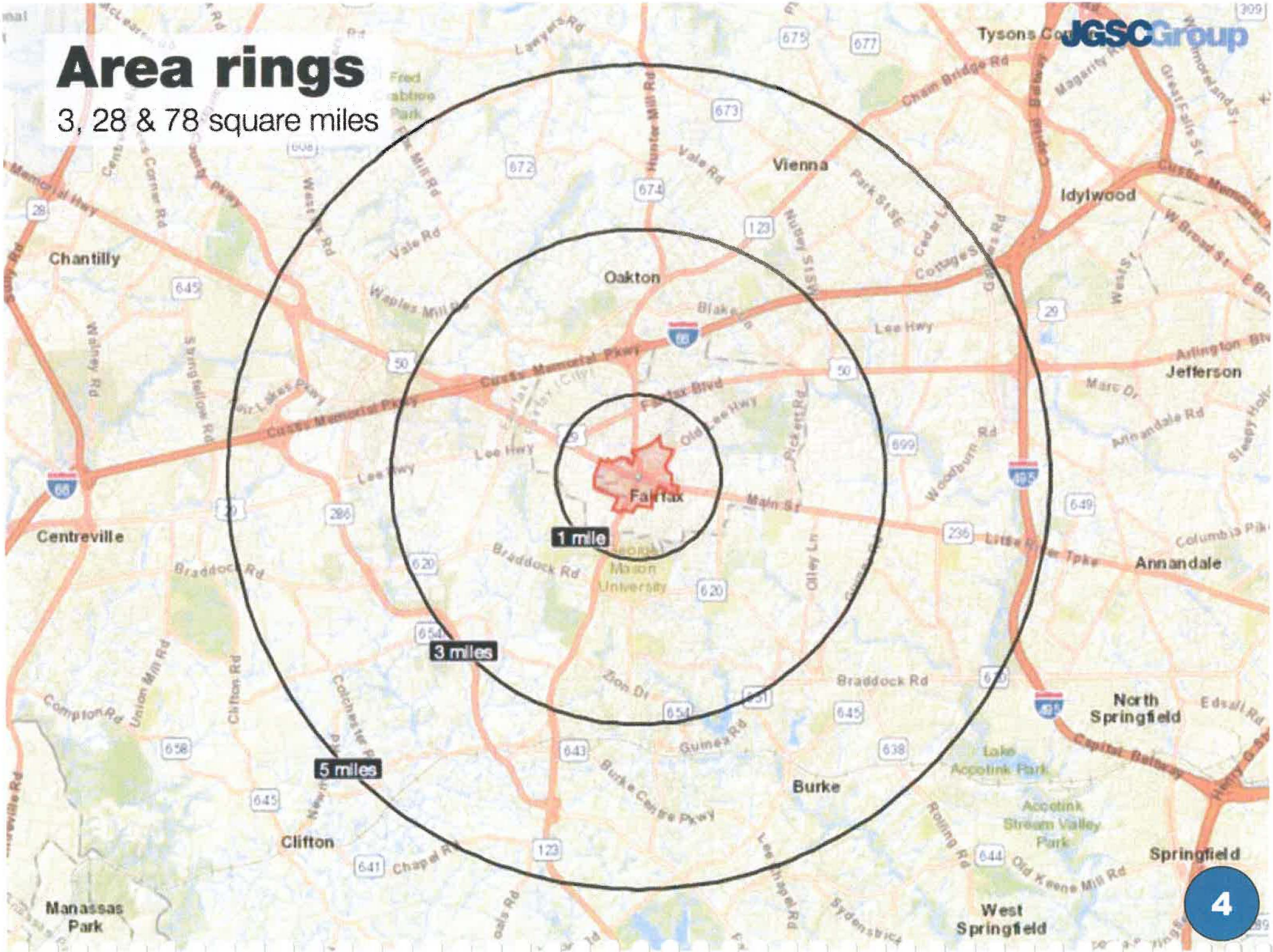
0.5 square miles




Fairfax County
406 square miles
JGSCGroup
Ashburn
Potomac
North Bethesda
Silver Spring
Bethesda
Adelphi
College Park
Chillum
Hyattsville
Beltsville
Herndon
Reston
McLean
Arcola
Chantilly
Centreville
Annandale
Arlington
WASHINGTON
Alexandria
Oxon Hill
Hillcrest Heights
Burke
Springfield
Franconia
Groveton
West Springfield
Manassas Park
Manassas
Fort Washington
Mt Vernon
Friendly
Woodbridge
Gallett
6km
4mi
3

Area rings

3, 28 & 78 square miles



Regional

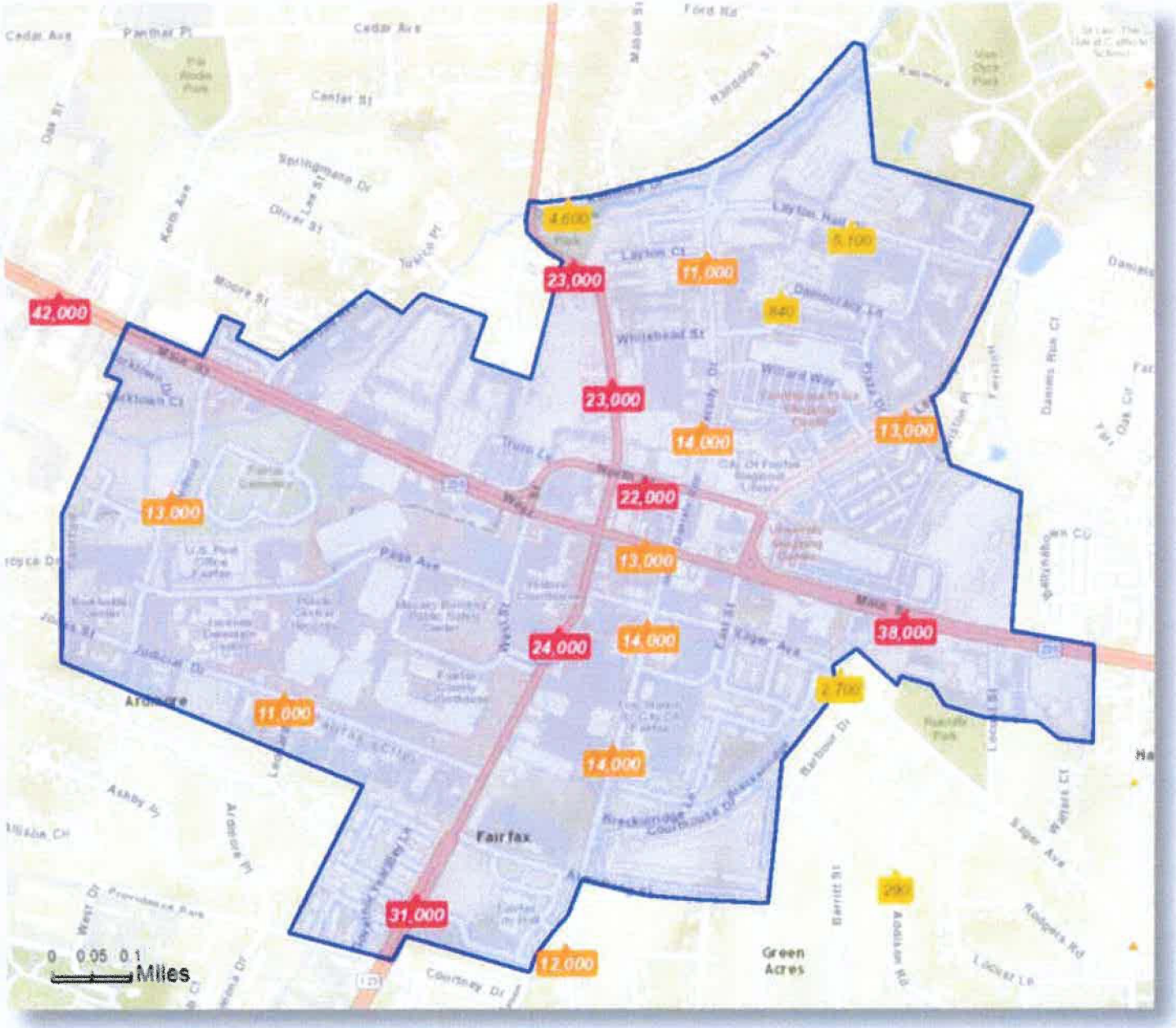
Demographic comparison

Demographics	1-mile	3-miles	5-miles	Region
Population	14,400	114,200	267,700	1,124,200
5yr Growth	1.25%	1.08%	0.85%	0.65%
Households	4,400	37,900	91,600	405,900
Household Density	1,399	1,343	1,167	1,000
Avg HH Income	$135,600	$144,300	$153,300	$147,600
Office workers	18,300	52,000	110,600	377,300

GMU student population is estimated at 6,000-7,000

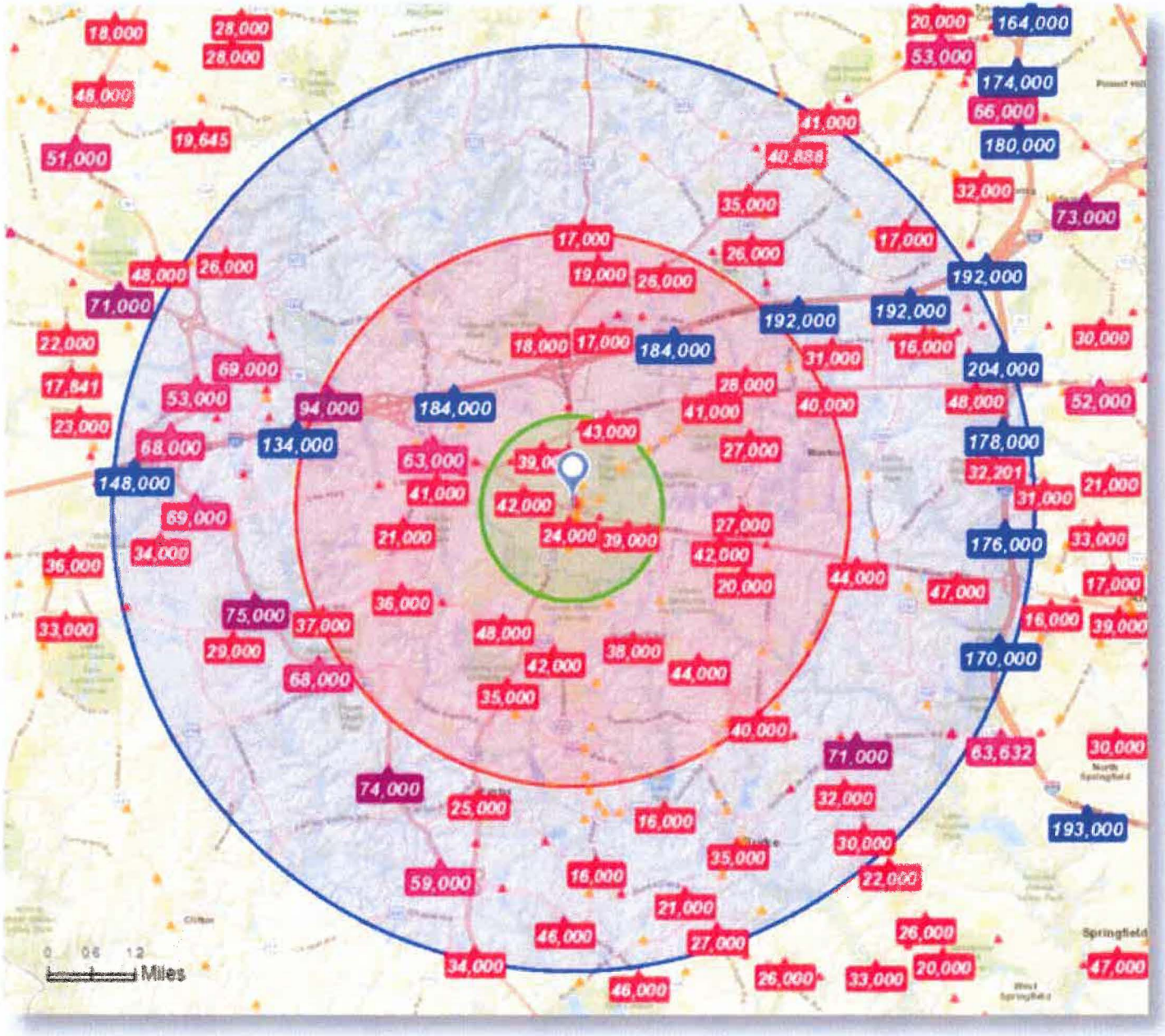
Traffic counts

Old Town AADT



Traffic counts

Regional AADT



Shopping

Nearby competition



Regional

Retail data comparison

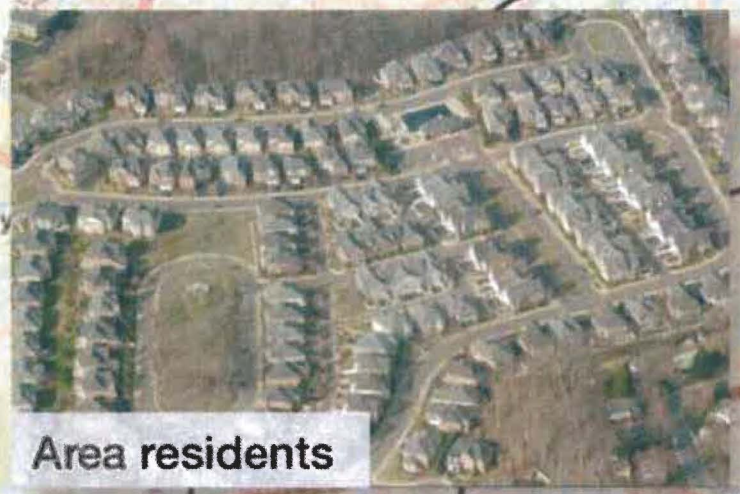
Retail data	1-mile	3-miles	5-miles	Region
Consumer Demand	$316 M	$2.753 B	$7.088 B	$18.347 B
Retail Supply	$664 M	$3.025 B	$6.390 B	$16.339 B
Retail Leakage	- $348 M	- $281 M	$ 698 M	$ 2.007 B
By category				
Automotive dealers	- $201 M	- $103 M	$541 M	$ 1.432 B
Home furnishings	- $6 M	$2 M	$23 M	$169 M
Clothing stores	$5 M	$66 M	$98 M	$373 M
Office Supply / Gifts	- $3 M	$12 M	$28 M	$128 M
Full-serve dining	- $21 M	$23 M	$124 M	$505 M
Limited-serve dining	- $21 M	$ 16 M	$ 74 M	$515 M

GMU student spending adds $10,500,000 to local demand

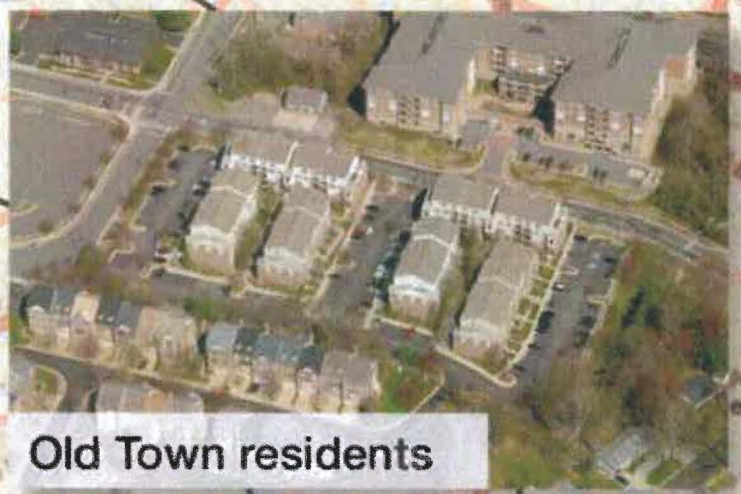
Office worker spending adds $105,815,000 to demand within 1-mile

Each new household adds about $65,000 to demand (measure?)

Target audience



Area residents



Old Town residents



Office workers



GMU students & staff

1 mile

Strategic plan

Make the retail match the setting



- Experience needs to last 4x journey
- Unique, eclectic dining offerings
- Sit-down, limited-service, outdoor
- Uncommon gift shops
- One-of-a-kind specialty retail
- Link GMU with Old Town

Next steps

Make the retail match the setting

JGSCGroup

Fairfax City…

Document existing retailers

Identify available retail space

Enroll GMU students/staff

JGSC Group…

Deliver data & analysis & data

Create marketing fact sheet

Develop list of prospects



JGSCGroup
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