

Draft Final Report

Springfield Town Center Market Analysis



Prepared for

**Fairfax County Department of
Housing & Community Development**

Submitted by

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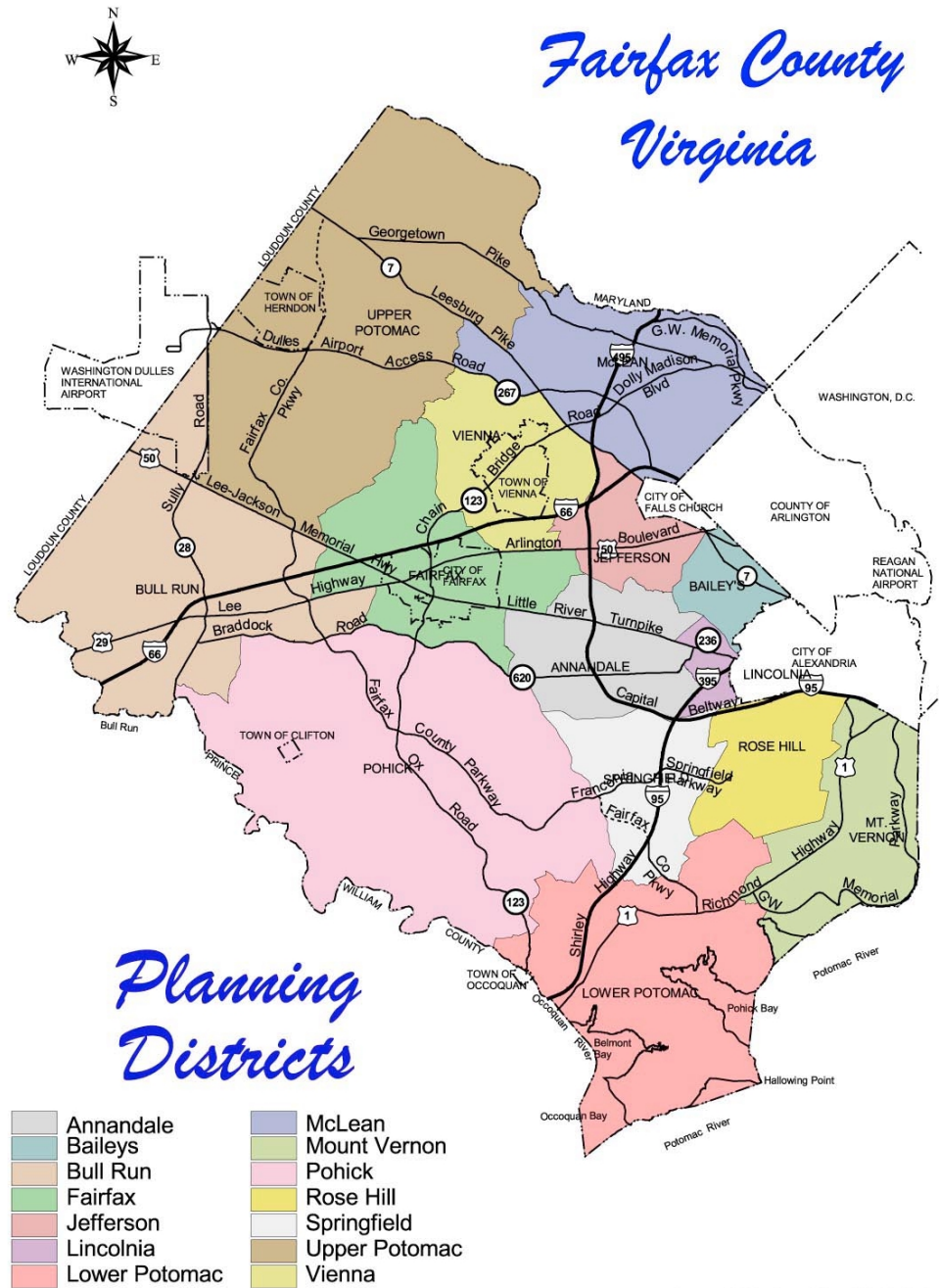
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I. Market Analysis



Market Analysis Introduction

Economics Research Associates (ERA), in conjunction with Strategic Land Planning and Gorove-Slade and Associates, Transportation Engineers, was retained by the Fairfax County Department of Housing and Community Development to prepare a Springfield Town Center Economic Feasibility Analysis.

The focus of this report is to develop an understanding of the market support for various land uses within the study area. The study area includes land parcels located at the intersection of Interstate 95 and Old Keene Mill Road, proximate to the new interchange which is being constructed off of Interstate 95. ERA has analyzed data and made preliminary suggestions as to the market conditions, context and potential to develop/redevelop commercial uses as part of the Town Center program. The market context considered includes both the greater Washington area as well as specific locations in and around the Springfield site. Commercial uses reviewed and tested include the following:

- *Retail*
- *Office (both Class A and Class B)*
- *Hotel*
- *Residential*
- *TheArts*

Executive Summary

Retail Market

- The ten mile radius (from the study area) includes a population of about 1,039,250 with an average household income of \$77,650. This population represents tremendous spending potential and is the primary reason that so many retailers seek sites in the Washington DC area. The area is also extremely competitive - currently, there are five major malls within ten miles of the Springfield site – Springfield, Pentagon City, Landmark, Fair Oaks, and Tysons I and II.
- There is a proliferation of retail strip centers within the Springfield area – we estimate that there is approximately 3.2 million square feet of such space in the immediate area (this figure includes several supermarket-anchored centers).
- Springfield Mall, although centrally located within the desirable Washington DC metropolitan market, tends to be overshadowed by larger malls with stronger tenants and department store anchors such as Tysons Corner I and II and Pentagon City. As an example, Pentagon City is anchored by Nordstrom, a department store which is typically able to draw customers from a much wider trade area because of its strength in merchandising. Conversely, Springfield Mall is anchored by two weaker department stores (JCPenney and Macy's) and has recently lost another anchor with the closing of Montgomery Ward's. While sales have been reported as high as \$360 per square foot by the *Washington Business Journal*, these sales figures could not be confirmed by the mall management as sales figures are not typically released to the public. We do know that the average sales productivity for regional malls within this region is approximately \$230 to \$250 per square foot. Therefore, the reported sales figures appear high given industry averages and the fairly weak anchors present at Springfield Mall.
- ERA believes that sufficient market demand exists to support a town center concept (assumed at 150,000 to 250,000 square feet), especially if the retail environment is unique and able to pull traffic from the nearby interchange. Anchors are also important in terms of drawing customers to an area and creating a viable destination. *The anchors do not necessarily have to be traditional department store anchors* – many retailers have experimented with larger format stores (approximately 30,000 square feet).

It is assumed that large floor plate tenants such as big box users (Toys ‘R Us) and discount stores (K-Mart) would not be appropriate for the town center concept. Moreover, such users require large parking lots, thus covering even greater areas and hindering a pedestrian environment. A complimentary mix of specialty retailers and restaurants/food service is most appropriate for a town center setting. This would include apparel shops, bookstores, food markets, bakeries, home furnishings, and sit-down as well as take-out restaurants. The mix varies widely from location to location, as does the type of retailer (e.g. national versus local), depending upon the local competitive environment. It is likely that a town center developer will recruit a predominance of national chains since they are typically more credit-worthy tenants and can afford higher rents. This should not preclude, however, successful local or regional chains (for example, Guapos is a successful regional ethnic chain with several metro-wide locations, including a new site in Shirlington).

- A combination of food service and retail is essential in terms of activating the district, especially during evening hours. Developers are now targeting high-quality restaurants as opposed to well known themed restaurants, including quality ethnic food service concepts.

Hotel Market

- The construction of two new hotels in the Springfield submarket (a Marriott Courtyard and Marriott TownePlace Suites) is an indication of the strength of the local hotel market. The TownePlace Suites will include 143 extended-stay rooms. All of the hotels currently located in Springfield, with the exception of the Hilton, are limited service hotels.
- Hotel occupancy in Springfield declined slightly from 1998 levels over the past two years, perhaps due in part to the congestion in the area due to construction at the interchange. Occupancy through October of this year is running at about 68 percent, compared to 70 percent for the same time period last year. Room rates have been steadily increasing since 1994 and now stand at about \$84 per room.
- Given the positive indicators with respect to hotel demand, as well as continued growth in the office market (Metro Park) and completion of the new interchange, it is not surprising that new hotel properties are being constructed. In the short term (next three to five years), given construction of approximately 300 new hotel rooms, the demand for new hotels is limited. In the longer term, the hotel market demand becomes more uncertain. If a Town Center concept is built in Springfield, including additional office space, it may be possible to support new

hotel rooms within the study area (a second full-service hotel room is a possibility). A detailed hotel market demand study should be completed after a decision is made regarding development of a town center concept in Springfield.

Office Market

- In mid-year 2000, the Springfield subarea contained 3.15 million square feet of inventory. The total inventory did not change from 1995 to 1999. Over the same time period however, Springfield's vacancy rate decreased from 13.9% to 6.3%, and average annual absorption reached over 200,000 square feet.
- While construction activity in Springfield had been stagnant in years previous, the past 18 months have demonstrated a significant turnaround (largely due to the advent of the Metro Park development, located adjacent to the Franconia/Springfield Metro stop). Currently, Metro Park has 420,000 square feet of space either occupied or under construction. All of this space has been leased, and it will be fully occupied by May of this year.
- The demand for additional office space is largely determined by the number of employees in the market that are users of such space. Based on employment growth, the Springfield area can support up to 500,000 square feet of new office space over the next ten years.

Housing Market

- The growth in Fairfax county has outpaced the region with an increase in population of 18% from 1990 to 2000.
- While the median market value of townhouses in Springfield is on pace with the county as a whole, there is only one submarket, Lower Potomac, that has a lower median value for single-family units.
- ERA looked at recent new residential development activity within the Springfield submarket. Given the constraints of the study area, townhouse development trends seem most relevant (perhaps as part of a new town development). A total of 242 new townhouse units have been planned in the Springfield area since May of 1999. Manchester Woods, which opened on October 1st of 2000, will ultimately include a total of 118 units - the base price averages \$308,000. To date, 22 units have been sold and build out is expected within 1 to 1 ½ years.

- Based on population forecasts from 2000 to 2010, there will be sufficient increased demand to support the construction of 2,622 additional units within the Springfield planning district (which is much larger than the study area). Thus, there exists more than sufficient market demand to accommodate new residential development within the study area.

The Arts

- The difficulty with operating and developing art facilities is generating sufficient funding for new development or rehabilitation of existing underutilized buildings. New development within the study area boundaries is a costly option given current land values. As a result, the County (and Springfield Art Guild) should:

-Investigate the potential for interim use of old retail space or public space such as the library for arts-related uses such as gallery space or practice space for theater groups.

-Continue to work with developers and property owners to encourage them to dedicate a portion of new projects as low-rent space for the arts. It will most likely be necessary to offer incentives in order to make this an effective strategy (e.g. density bonus if an arts related use is incorporated into the design).

-Work with developers to ensure that some space is set aside for arts related use. Many “town square” developments include gallery/studio space as part of the development scheme.

Key Issues

The following key issues were highlighted during discussions with various stakeholders within the community. These issues may ultimately impact plan development within the various land parcels (A-1, A-2, A-3, A-4, B, C, and D, maps of these parcels are included within the Appendix of this report).

- It is likely that Springfield Gardens, which is currently located along the periphery of land parcel C, will be maintained as below-market rate housing for the foreseeable future. The conceptual plans developed in the next stage of the planning process will address this issue from a physical planning perspective and also with respect to future transportation issues.
- The car dominates the landscape in the area, thus creating a pedestrian environment will be problematic. However, certain physical features can be incorporated which address this issue. Wide sidewalks, streetscape

improvements, street interventions (e.g. fountains, plazas), decreased street widths, and parking placed behind buildings can contribute positively to the street environment.

- Land ownership remains scattered within several portions of the study area and land values continue to escalate due to several factors, including construction at the interchange. However, it may be possible to assemble certain key parcels in order to create a site appropriate for a town center concept. On-going negotiations with various land owners are critical. The physical plans being prepared during the next several tasks will address land ownership in more detail and identify those key parcels which might be impacted by the new town center conceptual plans.
- There remains some question about plans for the old GSA site, although indications are that no action will occur at the site within the near future. The site could potentially accommodate a large scale commercial project if developed. The same is true of Engineering Proving Ground site located off of I-95 to the south. Obviously timing is critical since a new retail development at either site could preclude securing tenants in Springfield (many retailers have radius clauses which prevent them from building more than one store within a certain radius of their current store).
- There is county interest in building a gateway building on parcel A-3. It is not yet clear if the Tower building will remain or be replaced with a new commercial structure. The visibility of this site is critical, and a new use on this site would benefit from its exposure to the interstate. The county should continue discussions with the current property owner in order to ensure that his plans are well integrated with the town center concept.
- There is some concern regarding the ability of Springfield to successfully compete with the growth occurring along the Dulles corridor. Similarly, there is concern that the office market being overbuilt in Northern Virginia. Our market study indicates that office demand is still relatively strong within the Springfield area. A town center development in Springfield would further add to the appeal of a Springfield address.
- The construction project occurring at the interchange represents a significant opportunity for Springfield; conceptual plans should maximize access and visibility at the new interchange.

CANDIDATE USES AND PLANNING TARGETS

Springfield Town Center Feasibility Analysis

	<i>Planning Target</i>	<i>Supportable Rents/ Sales Price</i>	<i>Physical Characteristics</i>	<i>Issues</i>
Retail	More than sufficient market support for critical mass of retailers at new Town Center (assumed at between 150,000 and 250,000 square feet)	--Will vary greatly based on type of development and location.	--Destination, high-quality restaurants – 7,500+ square feet --Large format specialty stores – 30,000 square feet (example includes new Crate and Barrel concept which is aimed at first time home buyers) --Smaller specialty retailers typically range in size from 4,500 to 6,000 square feet	--Create a balance of local and national retail tenants in order to create a unique destination. --Build upon ethnic diversity of local trade area --Pursue “destination” retail to anchor town center (e.g. high quality restaurants, large format specialty retail stores)
Office	500,000 sq. ft over the next ten years (does not include the on-going development at Metro Park)	<u>Metro Park:</u> \$28.50 to \$29.50 per square foot	--depends upon site constraints, 20,000 to 25,000 sq. ft floor plate is typical for suburban office development and will allow for single tenant users on one floor, can also be easily subdivided, may preclude some government tenants.	--Metro access preferable --Nearby amenities, access to Town Center
Housing	Over 2,600 units can be supported over the next 10 years within the Springfield Planning District. It is assumed that there is more than enough demand to accommodate new housing as part of a new Town Center development (rental of for-sale)	<u>Forest at South Run:</u> --\$107,000 to \$192,000 townhomes <u>Manchester Woods:</u> --Base price averages \$308,000 for a townhome	<u>Example:</u> --Manchester Woods, 24 feet wide, 2,467 to 2,693 square feet total, 2 car garage, 3 levels, vaulted ceilings	--Amenities nearby (food market, pharmacy, restaurants, bookstores) --Potential to develop live/work units as part of Town Center development --Quality schools

	<i>20-year Planning Target</i>	<i>Supportable Rents/ Sales Price</i>	<i>Physical Characteristics</i>	<i>Issues</i>
Hotel	--Near term demand likely satisfied by construction of two new Marriott concepts. Further study needed pending a decision regarding the Town Center development.	Current Room Rates: \$110 - \$160 for full service Hilton; assume higher rates for new hotel/conference center (\$199+)	--Full service hotels typically include gift shops, restaurants, health clubs, transportation (e.g. airport shuttle), and oftentimes conference facilities. Exact sizing (number of rooms) will vary based on market demand.	--Proximate to new office space --Longer-term opportunity contingent on pace of development of Town Center
The Arts	--potential for live/work space as part of Town Center --additional studio/gallery space to showcase local artwork --common practice and support space for theaters (potential interim use for underutilized buildings) --potential for county-wide cultural facility currently under study	<u>Live/Work</u> --unproven market <u>Galleries</u> --rents typically less expensive than retail, may have to offer incentives in order to make viable, especially for non-profit galleries.	<u>Live-Work Studios</u> --Prototypes in Washington DC are programmed at 1,300 to 2,280 square feet with oversized hallways to accommodate moving artwork. Smaller work studios could also be developed and limited to work spaces only (500 to 1,000 square feet).	<u>Live/Work Space</u> --Near amenities such as coffeehouse, etc. --Zoning issues w/ respect to live/work space

Source: Economics Research Associates

Retail Market

Industry Trends

In general, regional malls attract customers from about a ten mile radius. Due to the population densities and high incomes in the Washington DC area, the retail climate throughout the metropolitan area is extremely competitive. Currently, there are five major malls within ten miles of the Springfield site – Springfield, Pentagon City, Landmark, Fair Oaks, and Tysons I and II.

Springfield Mall, although centrally located within the desirable Washington DC metropolitan market, tends to be overshadowed by larger malls with stronger tenants and department store anchors such as Tysons Corner I and II and Pentagon City. As an example, Pentagon City is anchored by Nordstrom, a department store which is typically able to draw customers from a much wider trade area because of its strength in merchandising. Conversely, Springfield Mall is anchored by two weaker department stores (JCPenney and Macy's) and has recently lost another anchor after the closing of Montgomery Ward's. While sales have been reported as high as \$360 per square foot by the *Washington Business Journal*, these sales figures could not be confirmed by the mall management as sales figures are not typically released to the public. We do know that the average sales productivity for regional malls within this region is approximately \$230 to \$250 per square foot. Therefore, the reported sales figures appear high given industry averages and the fairly weak anchors present at Springfield Mall.

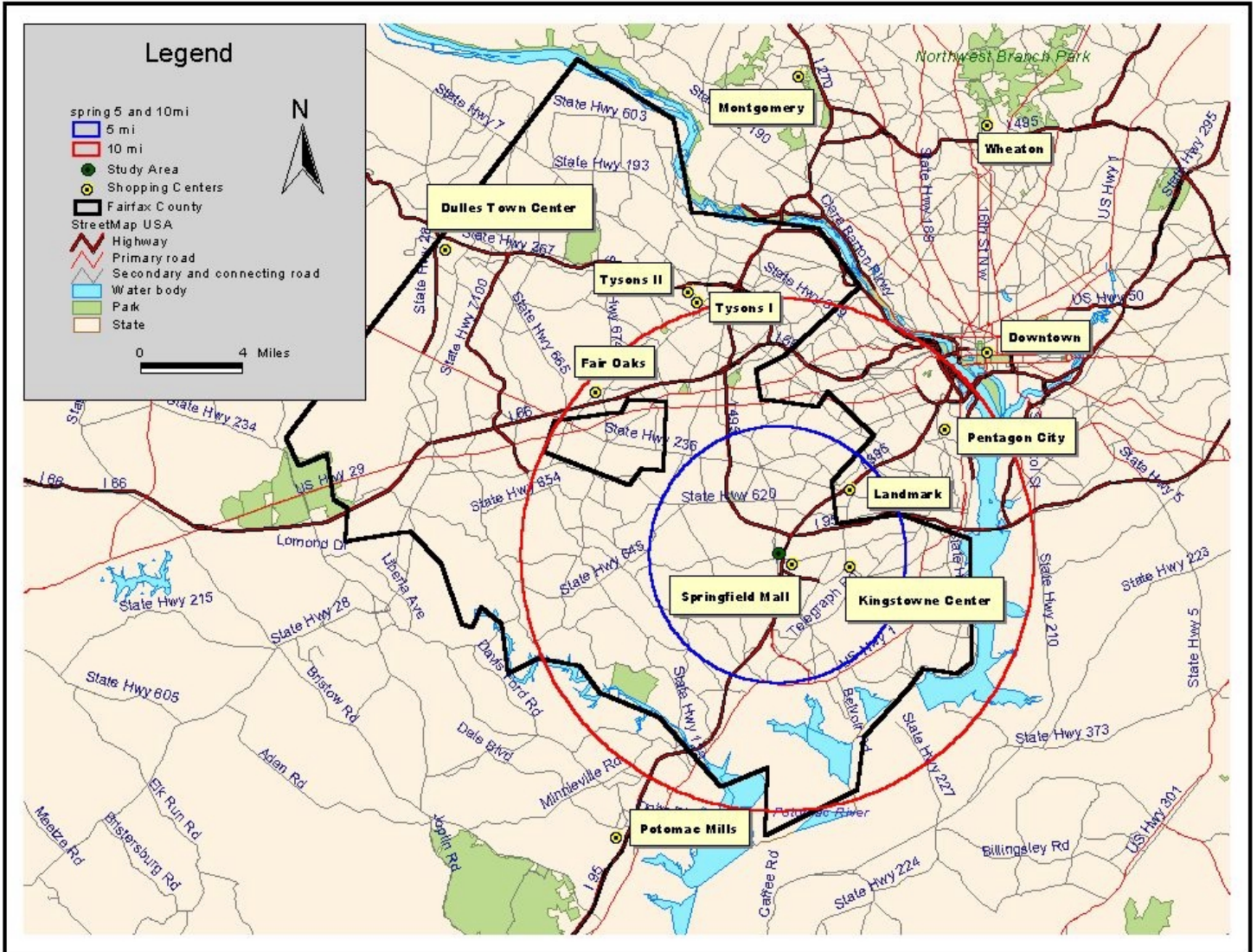
The ten mile radius (from the study area) includes a population of about 1,039,250 with an average household income of \$77,650. As mentioned above, this population represents tremendous spending potential and is the primary reason that so many retailers seek sites in the Washington DC area.

As shown in the table below, there is a large inventory of strip mall retail within the immediate area of the site. It is our understanding that Concord Centre is currently for sale, however, reportedly the property is overvalued. A portion of Springfield Plaza, which occupies a large portion of Parcel C, has been renovated.

<u>Center Name</u>	<u>Major Anchors</u>	<u>Total GLA</u>
Best Buy Metro Center	Best Buy, PETsMART	105,237
Brookfield Plaza Center	Dong Nam	61,800
Cardinal Forest Plaza	CVS, Giant Food	81,468
Commerce Plaza	El Mercado Market	31,722
Concord Centre	NA	81,252
Franconia Forest Center	NA	NA
Kings Park Shopping Center	CVS, Giant Food	73,485
Loisdale Center	Barnes & Noble; Bed, Bath & Beyond, Circuit City; Designer Shoe Warehouse	121,079
Newington Center	NA	80,459
Old Keene Mill Shopping Center	Fresh Fields	91,782
Ravensworth Shopping Center	Safeway, 7-Eleven	110,000
Saratoga Center	Giant Food	102,527
Springfield Commons	Borders, Home Depot, Staples	220,000
Springfield Mall	JcPenney, Macy's, Montgomery Ward	1,700,000
Springfield Plaza	Gateway Computers, Giant Food, Hallmark/Lamp Factory Outlet, Mars Music, Petco	274,635
Spring Mall Square	Godfather's Pizza, West Springfield Shopping Center	24,000
West Springfield Shopping Center	NA	<u>83,562</u>
TOTAL SPACE		3,243,000
<i>Source: NRB Shopping Center Directory and Economics Research Associates</i>		

Interest in creating a pedestrian-oriented “main street” development in Springfield is in keeping with the national trend of place making. Typically such a town center integrates the surrounding community with compatible massing and roadways. Parking is typically tucked away behind buildings and civic uses such as libraries are oftentimes incorporated into the overall plan. Phasing is also important since market demand and/or budget requirements often force developers to build incrementally. Creating a continuous street frontage is important during the early phases so that the integrity of the project is ensured at an early stage.

Many retailers are turning to this new “street” environment as a preferable alternative (in some cases rents are lower since the high common area charges sometimes associated with regional malls are avoided). Current national retailers turning to main street development include The Gap and Limited Stores such as Express, Victoria’s Secret, and Abercrombie and Fitch. Big box stores are typically not an alternative since they require much larger floor plates and parking facilities.



Case studies highlighting main street developments are included within the appendix of this report.

Current Development Activity

A new retail center named Kingstowne Town Center is being constructed a short distance from the Springfield site (a map depicting the Kingstowne Town Center, as well as the other regional malls in the area, is included on the following page). It is anticipated that the center will be completed in spring of 2001. The tenant list includes Cost Plus World Market, TJ Maxx, Home Goods and Safeway. The Safeway will also include a Starbucks, dry cleaners, a photo lab, and a meeting room for community groups. It is also likely that the center will include a 110,000 square foot Home Depot Expo Design Center.

- Retail tenants will pay rents of about \$25 per square foot.

- Kingstowne Center will eventually include 850,000 square feet of office space and about 500,000 square feet of retail. The project has been in the planning stages for the past 15 years.

Planning Targets

The potential market support for retail space within Springfield is in large part dependent upon the ability to capture the spending potential from the primary markets drawn to the area - residents, overnight hotel guests, and employees. Typically an “inflow” of customers also occurs, especially given Springfield’s location relative to the new interstate configuration (an estimated 267,000 cars will pass by every day). Inflow is difficult to quantify as it can include several different markets (e.g. resident/visitors driving by on the interstate, day visitors to the region visiting relatives in the area, business visitors staying outside of the immediate study area, visitors to the mall touring outside of the immediate downtown business district). However, we do know from experience that inflow typically accounts for 20 to 25 percent of total sales at a regional mall or downtown commercial district.

ERA looked at the magnitude of each of these markets, keeping in mind that ultimately market support depends upon the quality of the retail offerings, physical access to the area, the competitive environment in the surrounding area, and the presence of a critical mass of retailers. If Springfield Town Center is developed as a “main street” concept and provides an outdoor shopping environment with wide sidewalks, destination retailers (many retailers have experimented with larger format

stores and other options include new off-price alternatives such as the new Crate and Barrel concept which is aimed at the new homeowner/renter), and several types of dining choices, it will be able to compete effectively within the competitive Washington DC metro market.

For this analysis we have assumed that the residential trade area includes those residents living within a five mile radius, or about 115,900 total households. In a highly competitive environment such as Washington DC – the capture of the residential market spending potential will be highly dependent upon the quality of the retail environment given the proximity of several dominant shopping malls in the area. Given the significant spending power of the residential market, even a small capture of this potential is notable. Total expenditure potential for the resident market is based on the number of households, average household income (\$77,019 for the five mile trade area), and typical spending patterns for goods such as apparel, general merchandise and furniture (which is typically about 22 percent of disposable income, based on spending surveys conducted by the US Census).

Demographic Summary of Trade Area		
Springfield Town Center		
	Defined By:	
	<u>Zip Codes</u>	<u>5-mile Ring</u>
<u>1999</u>		
Population	146,644	301,772
Households	52,818	115,879
Average Household Income	\$81,200	\$77,019
No. Households w/ AHHI \$75,000+	23,927	45,589
Population <18	24%	23%
Population 65+	6%	8%
<u>Race</u>		
White	77%	73%
Black	7%	10%
Hispanic Origin	10%	10%
<u>2004</u>		
Population	157,900	323,442
Households	57,600	125,606
<i>Note: Trade area defined as the following zip codes:</i>		
<i>22150, 22151, 22152, 22153, 23310, 23315</i>		
<i>Based on definition in 1997 Robert Charles Lesser Report</i>		
<i>Source: CACI, Economics Research Associates</i>		

The employee market includes close to 17,000 workers. This is based on the total inventory of office space in Springfield (approximately 3.2 million square feet with a vacancy rate of about 6 percent). We know from surveys of downtown workers that they typically spend about \$2,100 annually – and that over half of the total spending is for food outside of the office.

Office Market	
Springfield Town Center	
Total Office Space (sq ft):	3,150,912
Vacancy Rate	6.29%
Total Occupied Space	2,952,720
Estimated Space per Employee (sq ft)	175
Total Estimated Employment	16,873
Avg. Annual Spending 1/	
Retail	\$ 800
Meals and Beverages	\$ 1,300
TOTAL	\$ 2,100
Total Annual Spending Potential	
Retail	\$ 13,498,147
Meals and Beverages	\$ 21,934,489
TOTAL	\$ 35,432,636
<i>1/ Based on International Council of Shopping Centers Survey. Spending rates have been increased slightly to account for inflation.</i>	
<i>Source: ICSC, Economics Research Associates</i>	

Overnight visitors to Springfield represent another sizable market. The number of overnight visitors is based on the total number of hotel rooms in Springfield and occupancy rates for the area, or about 213,650 overnight visitors annually.

Hotel Market			
Springfield Town Center			
	No. of Rooms	Estimated Annual Occupancy	Estimated Annual Visitation
Holiday Inn Express	194	68%	38,521
Comfort Inn	112	68%	22,239
Days Inn	179	68%	35,542
Motel 6	193	68%	38,322
Hilton Inn	245	68%	48,647
Hampton Inn	153	68%	30,380
Mariott Courtyard (to be built)	150	68%	29,784
Mariott TownePlace Suites (to be built)	143	68%	28,394
TOTAL HOTEL GUESTS	1,369		271,829
<i>Note: Hotel visitation calculated based on 1.2 persons per room staying on average 1.5 nights. Occupancy rate based on data provided by Smith Travel Research.</i>			
<i>Source: Economics Research Associates</i>			

The tables on the following pages point to the magnitude of the market demand in the Springfield area. As shown, the resident market represents the majority of the buying potential in the area (\$1.3 billion). ERA has tested the amount of spending potential which would have to be captured in order to support various levels of new retail within the Springfield Town Center. Based on creating a critical mass of retail space within a “town center” setting, ERA has tested for 150,000 to 250,000 square feet of retail space.

As shown in the following table, because of the large spending potential in the Springfield area, only two to four percent of the total expenditure potential must be captured in order to support a critical mass of retail within the study area. ERA believes that sufficient market demand exists to support a town center concept, especially if the retail environment is unique and able to pull traffic from the nearby interchange. Anchors are also important in terms of drawing customers to an area and creating a viable destination. *The anchors do not necessarily have to be traditional department store anchors* – many retailers have experimented with larger format stores (approximately 30,000 square feet). Other options include new off-price alternatives. Crate and Barrel is currently testing lower priced home furnishing stores aimed at younger shoppers. The concept is being tested in Chicago and will expand based on the success of the first store.

Total Retail Spending Potential by Market

Springfield Town Center

Resident Market

Population	301,772
Households	115,879
Average Disposable Income	\$54,173
Total Spending Potential	\$6,277,513,067
Spending on GAFO type goods 1/	\$1,362,848,087

Employee Market

Estimated Number of Employees	16,873
Average Spending per Employee 2/	
Food	\$1,300
Retail	<u>\$800</u>
TOTAL	\$2,100
Total Worker Spending Potential	\$35,432,636

Overnight Hotel Market

Estimated Number of Visitors	271,829
Average Daily Expenditure	
Food	\$64
Retail	<u>\$31</u>
TOTAL	\$95
Total Overnight Visitor Spending Potential	\$25,823,721

1/ Refers to spending for general merchandise, apparel, furniture, services, food away from home

2/ Based on International Council of Shopping Centers Survey. Spending rates have been increased slightly to account for inflation.

Source: CACI, International Council of Shopping Centers, Economics Research Assoc.

Capture Rate Analysis

Springfield Town Center

<i>Total Spending Potential by Market</i>	
Residents	\$1,362,848,087
Employees	\$35,432,636
Overnight Visitors	\$25,823,721
	\$1,424,104,443

Total New Retail Space (sq ft)		<u>150,000</u>	<u>200,000</u>	<u>250,000</u>
Total Required Sales @	\$225 psf	\$33,750,000	\$45,000,000	\$56,250,000
	\$250 psf	\$37,500,000	\$50,000,000	\$62,500,000
Required Capture of Market		2.4%	3.2%	3.9%
		2.6%	3.5%	4.4%

Source: Economics Research Associates

Potential Retail Targets

Since the focus of this study is the redevelopment of a portion of the Springfield Community Business Center as a new Town Center, ERA has focused on retail tenant targets which are appropriate for a town center setting. It is assumed that large floor plate tenants such as big box users (Toys 'R Us) and discount stores (K-Mart) would not be appropriate for the town center concept. Moreover, such users require large parking lots, further hindering creation of a pedestrian environment. The development of a new concentration of off-price/discount stores at Kingstowne Town Center will also satisfy some of the pent-up demand for discount retailers.

As mentioned earlier, a complimentary mix of specialty retailers and restaurants/food service is most appropriate for a town center setting. This would include apparel shops, bookstores, food markets, bakeries, home furnishings, and sit-down as well as take-out restaurants. The mix varies widely from location to location, as does the type of retailer (e.g. national versus local), depending upon the local competitive environment. It is likely that a town center developer will recruit a predominance of national chains since they are typically more credit-worthy tenants and can afford higher rents. This should not preclude, however, including successful local or regional chains (for example, Guapos is a successful regional ethnic chain with several metro-wide locations, including a new site in Shirlington).

A combination of food service and retail is essential in terms of activating the district, especially during evening hours. Developers are now targeting high-quality restaurants as opposed to well known themed restaurants, including quality ethnic food service concepts. As an example, Buca di Beppo is a type of destination dining attraction which focuses on serving Southern Italian family-style meals. The restaurants are typically large (7,500 square feet) and generate sales of \$2.5 to \$3 million.

Although cinemas have served as a common anchor for many retail projects over the past several years, the movie theater industry is currently in trouble. As theater companies have opened larger megaplexes across the country, they have taken business away from smaller theaters (often owned by the same company). Encumbered with long-term leases, the theater companies are then burdened with several outmoded and non-competitive theaters. Some movie theater companies such as Edwards and Carmike Cinemas have recently filed for bankruptcy. United Artists Theater Co. also filed for Chapter 11 protection in September of this year. The company is seeking to reject the leases on 70 cinemas it has already closed. This begs the question about the likelihood of securing a theater tenant in the near future.

Hotel Market

Industry Trends

The construction of two new hotels at the interchange in Springfield (a Marriott Courtyard and Marriott TownePlace Suites) is an indication of the strength of the local hotel market. The TownePlace Suites will include 143 extended-stay rooms.

All of the hotels located in Springfield, with the exception of the Hilton, are limited service hotels. Limited service hotels are typically found at the outer edges of urban communities, in smaller markets, and along primary traffic arteries. These properties offer limited amenities. An outdoor pool, continental breakfast, game rooms, and gift shops are typical amenities. These properties cater to more price-sensitive clientele and persons seeking convenience. Often, limited service market areas do not have the concentration of business demand and other higher rated demand segments that can afford to pay the rates required to support full service hotels (such as in a downtown area). Examples in Springfield include the Hampton Inn, Holiday Inn Express, and Comfort Inn.

Hotel development has evolved to include hybrids of the standard hotel types. Examples include the limited service hotel that sells or leases a parking lot restaurant pad to increase the property's amenity level, the extended stay property that offers a long term discounted rate by limiting amenities and overhead, and the suite product that targets cost conscious families and guests attracted by the additional space/convenience, with a slightly higher amenity level. Hybrid hotel development costs are variable, depending on the specific product developed.

The following table highlights the hotels located in Springfield, Virginia.

Hotel Inventory Springfield, Virginia				
	<i>No. of</i> <u>Rooms</u>	<i>Year</i> <u>Opened</u>	<i>Rates</i> <u>Single/Double</u>	<u>Suite</u>
Hilton Inn Springfield	246		\$89-\$139	\$125-\$360
Comfort Inn	112	1980	\$45-\$78	\$195
Hampton Inn	153	1995	\$89-\$99	na
Days Inn	179		\$78-\$94	na
Holiday Inn Express	194	1975	\$94-\$104	na
Motel 6	193		\$56-\$84	na
TOTAL	1,077			

Demand Indicators

The commercial office sector provides a significant source of demand for area hotels, as does the significant visitor market in the Washington DC area. There is an increasing trend whereby visitors to Washington DC stay in hotels out of the downtown business district but proximate to Metro in order to pay lower room rates.

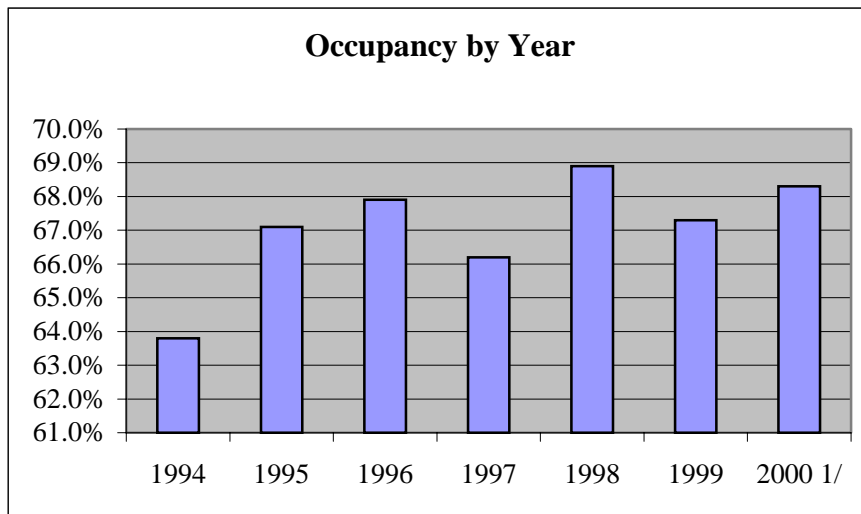
Hotel occupancy in Springfield declined slightly from 1998 levels over the past two years, perhaps due in part to the congestion in the area due to construction at the interchange. Occupancy through October of this year is running at about 68 percent, compared to 70 percent for the same time period last year. Room rates have been steadily increasing since 1994 and now stand at about \$84 per room. Trends are based on cumulative data for the Holiday Inn Express, Comfort Inn, Days Inn, Motel 6, Hilton Inn, and Hampton Inn.

Revenue per Available Room (RevPAR) is defined as the average daily rate multiplied by the occupancy. RevPAR is an excellent indicator of hotel market strength because it accounts for variations of occupancy that might occur with a rate increase, and vice-versa. As shown on the following pages, RevPAR has been steadily increasing since 1994.

**Hotel Market
Springfield Town Center Study**

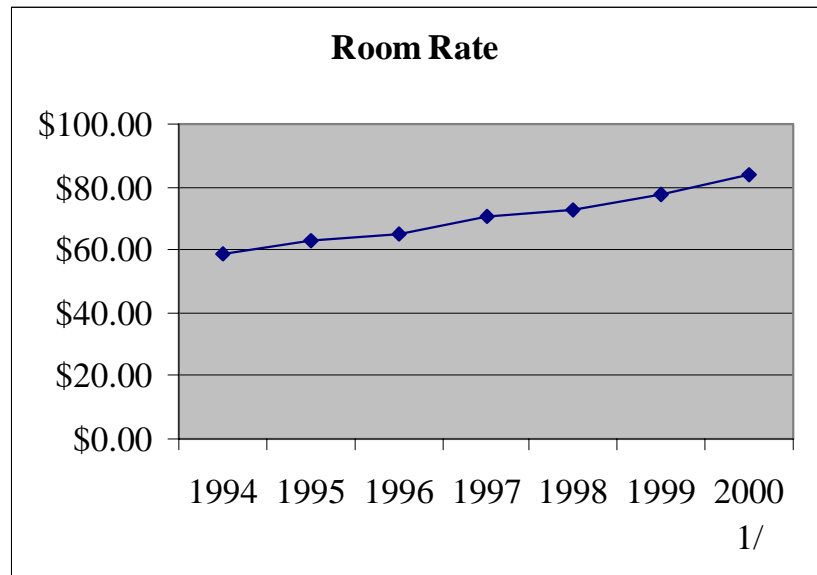
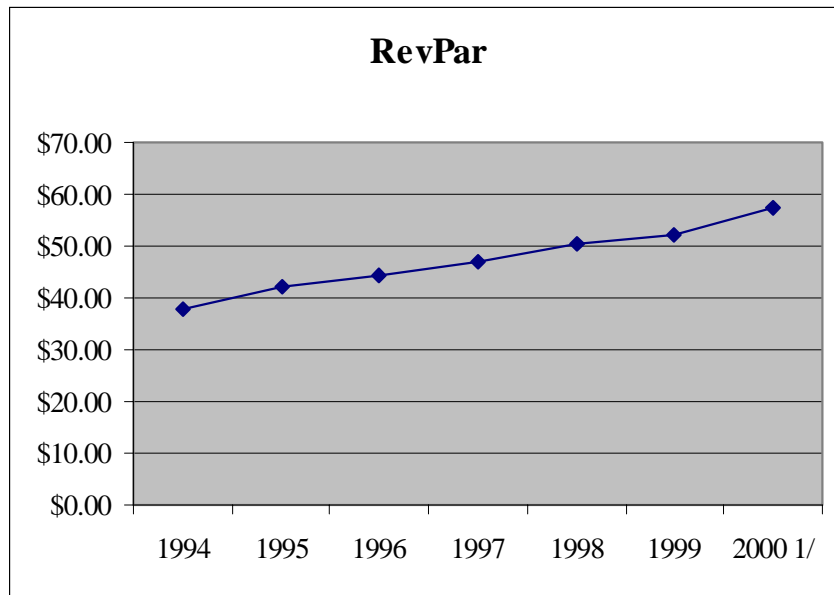
	Occupancy	Room Rate	Revenue per Available Room
1994	63.8%	\$59.04	\$37.69
1995	67.1%	\$62.99	\$42.29
1996	67.9%	\$65.22	\$44.29
1997	66.2%	\$70.72	\$46.79
1998	68.9%	\$73.05	\$50.35
1999	67.3%	\$77.61	\$52.20
2000 1/	68.3%	\$84.11	\$57.45

1/ Reflects data through October of 2000.



Source: Smith Travel, Economics Research Associates

Hotel Market Indicators - Springfield Market



1/ Reflects data through October of 2000.

Total Change in Room Demand/Supply		
Springfield Town Center		
	<u>Room Demand</u>	<u>Room Supply</u>
1994	215,095	336,895
1995 1/	254,425	378,970
1996	266,712	392,740
1997	259,853	392,740
1998	270,709	392,740
1999	264,154	392,740
<i>1/ Hampton Inn added to inventory of hotels.</i>		
<i>Source: Smith Travel, Economics Research Associates</i>		

The above table further points to the strength of the hotel market in the Springfield area. As shown, room demand increased by 49,000 room nights since 1994. Given the positive indicators with respect to hotel demand, as well as continued growth in the office market (Metro Park) and completion of the new interchange, it is not surprising that new hotel properties are being constructed. In the short term (next three to five years), given construction of approximately 300 new hotel rooms, the demand for new hotels is limited. In the longer term, the hotel market demand becomes more uncertain. If a Town Center concept is built in Springfield, including additional office space, it may be possible to support new hotel rooms within the study area (a second full-service hotel room is a possibility). A detailed hotel market demand study should be completed after a decision is made regarding development of a town center concept in Springfield.

The Arts

Market Demand

Market demand for art facilities in Springfield is based on conversations with representatives from art groups active in the area.

According to representatives, there is currently a lack of performance space, as well as visual arts space, in the Springfield area. For several years local artists have been attempting to build support for a Springfield Community Center. Ideally, the center would house a theater (number of seats to be determined – it was mentioned that the theater at Reston Town Center has 300 seats), rehearsal space, scene shop, and storage space. Performances are currently held in local churches. According to local representatives, there exists a county-wide demand for a cultural facility, and a study is currently be conducted by Fairfax County to assess this demand.

According to art group representatives, demand also exists for space for exhibition, studios, and teaching. Currently the only public venues for displaying artwork include Northern Virginia Community College, the Annandale gallery and the Fairfax Government Center.

Issues and Strategies

The difficulty with operating and developing art facilities is generating sufficient funding for new development or rehabilitation of existing underutilized buildings. New development within the study area boundaries is a costly option given current land values. The Arlington Arts Incubator, which is described below and which has been imitated throughout the country, offers some valuable insights.

Following are some preliminary thoughts regarding strategies for developing arts-related space within the study area:

- Investigate the potential for interim use of old retail space or public space such as the library for arts-related uses such as gallery space or practice space for theater groups. In some cities undertutilized or vacant retail space is used by local schools and colleges for art and architecture studios and labs.
- The county and Springfield Art Guild should continue to work with developers and property owners to encourage them to dedicate a portion of new projects as low-rent space for the arts. It will most likely be necessary to offer incentives in order to make this an effective strategy (e.g. density bonus if an arts related use is incorporated into the design).

- Many “town square” developments include gallery/studio space as part of the development scheme. Again, the county should work with developers to ensure that some space is set aside for arts related use.

Arlington Arts Incubator

The incubator is run by the Cultural Affairs Division of Arlington County and provides a central location for securing facilities and resources. Any artist or group is supported by the county through a competitive grants process. The incubator secures rent-free facilities from a variety of sources including schools, commercial warehouses, and vacant retail space. County staff also negotiate arts space as part of new development projects. In this way, a variety of groups benefit from just a few spaces secured by the county. *Central to the success of the program is consolidation of services and modification of existing spaces and uses.* Other cities across the country have used the Arlington program as an example - a town in New Jersey uses vacant dorm rooms during the summer for an artist’s colony.

Office Market

Industry Trends

The Washington metro area office market is continuing its unprecedented growth and remains among the strongest markets in the country. Vacancy rates have declined each year and, by the end of the third quarter of 2000, fell to a level of 3.8% for the metro area as a whole. This factor combined with recent levels of absorption, over 11 million square feet in 1999 and almost 11.9 million by the end of the third quarter of 2000, has led to rent increases of approximately 10% annually. Top rental rates have exceeded \$50/sf downtown and \$40/sf in the suburbs.

By the mid-point of 2000, Fairfax County had a standing inventory of over 90.5 million square feet of total office space and a vacancy rate of 3.2%. The county's mid-year absorption was reported to be over 7.3 million square feet, a figure greater than the *annual absorption* of 1998.

Clearly, Springfield is in the midst of strong local and regional markets for office space. Please note that the boundaries of the subareas listed in the following table correspond to the county's planning districts. A map of these planning districts is included in the appendix.

Summary of Office Market Activity in Fairfax County, 1996 to 2000

	1996	1997	1998	1999	Mid 2000	% Change '96 to Mid 2000
<i>Total Inventory</i>						
Annandale	1,572,847	1,572,847	1,572,847	1,572,847	1,572,847	0.0%
Burke	489,320	489,320	489,320	509,320	509,320	4.1%
Franconia	353,442	353,442	363,442	363,442	534,442	51.2%
Newington & Lorton	278,333	447,072	447,072	447,072	447,072	60.6%
Springfield	3,150,912	3,150,912	3,150,912	3,150,912	3,150,912	0.0%
Surrounding Submarket Total	5,844,854	6,013,593	6,023,593	6,043,593	6,214,593	6.3%
*Fairfax County	78,265,573	79,617,676	82,088,287	88,375,053	90,517,921	15.7%
<i>Vacant Space</i>						
Annandale	201,369	171,365	81,644	130,355	125,676	-37.6%
Burke	15,334	25,727	23,481	5,362	3,718	-75.8%
Franconia	29,253	34,789	36,498	32,153	41,651	42.4%
Newington & Lorton	85,657	152,846	159,830	269,112	156,255	82.4%
Springfield	438,397	425,109	271,672	311,835	198,109	-54.8%
Surrounding Submarket Total	770,010	809,836	573,125	748,817	525,409	-31.8%
Fairfax County	4,908,932	3,390,293	3,392,909	4,241,492	2,871,905	-41.5%

Springfield Town Center Feasibility Analysis

Vacancy Rate

Annandale	12.8%	10.9%	5.2%	8.3%	8.0%
Burke	3.1%	5.3%	4.8%	1.1%	0.7%
Franconia	8.3%	9.8%	10.0%	8.8%	7.8%
Newington & Lorton	30.8%	34.2%	35.8%	60.2%	35.0%
Springfield	13.9%	13.5%	8.6%	9.9%	6.3%
Surrounding Submarket Total	13.2%	13.5%	9.5%	12.4%	8.5%
Fairfax County	6.3%	4.3%	4.1%	4.8%	3.2%

Annual Net Absorption

						Average Annual
Annandale	64,717	78,388	59,461	52,956	53,401	68,650
Burke	2,828	9,243	16,886	12,931	3,653	10,120
Franconia	0	10,972	27,807	21,509	232,950	65,164
Newington & Lorton	176,232	61,653	56,305	28,845	138,144	102,484
Springfield	183,892	104,710	227,804	191,175	212,407	204,442
Surrounding Submarket Total	427,669	264,966	388,263	307,416	640,555	450,860
Fairfax County	3,755,308	2,529,186	3,835,202	5,485,674	7,372,667	5,106,230

* County Total Supply includes inventory outside of submarket areas

Source: Fairfax County Economic Development Authority; Economics Research Associates

In mid-year 2000, the Springfield subarea contained 3.15 million square feet of inventory. This figure that had not changed in the past four years. Over the same time period however, Springfield's vacancy rate decreased from 13.9% to 6.3%, and average annual absorption reached over 200,000 square feet. Decreasing vacancy rates, increasing absorption, and new office development point to the increase in demand for office space in the Springfield subarea over the course of the past four years.

Current Development Activity

While construction activity in Springfield had been stagnant in years previous, the past 18 months have demonstrated a significant turnaround (largely due to the advent of the Metro Park development, located adjacent to the Franconia/Springfield Metro stop). Currently, Metro Park has 420,000 square feet of space either occupied or under construction. All of this space has been leased, and it will be fully occupied by May of this year. In December of 2000, the development broke ground on its next building, a 150,000 square foot structure to be completed by December of this year. The developer has plans for the construction of another 615,000 square feet, and will build as quickly as the space can be leased. Rents at Metro Park are approximately \$28.50 to \$29.50 per square foot.

Planning Targets

The demand for additional office space is largely determined by the number of employees in the market that are users of such space. Different industry sectors have distinct propensities for office space utilization. Typically, the services, FIRE (finance, insurance, and real estate), and TCU (transportation, communication, and utilities) industries utilize a higher proportion of office space than other industries,

and can serve as indicators of demand. ERA evaluated projected growth in these sectors in order to estimate future demand for office space in Springfield. Because employment projections by industry sector were unavailable at the Springfield level of geography, data at the county level was used and, subsequently, a capture rate for Springfield was applied to the county totals. The table below illustrates the calculations and results.

Office Space Demand Forecast 2000 to 2010		
	<u>Baseline</u>	<u>Optimistic</u>
<i>Net New Employees in the Fairfax County (000s)</i>		
Services	58.21	58.21
FIRE	10.35	10.35
TCU	7.48	7.48
Total	76	76
<i>Office Space Demand (Sq Ft in 000s)</i>		
Services	5,603.03	5,603.03
FIRE	1,358.36	1,358.36
TCU	589.24	589.24
Total, Fairfax County (Sq Ft in 000s)	7,550.62	7,550.62
Allowance for Stabilized Vacancy	6%	6%
Net Total (000s)	7,097.59	7,097.59
Springfield Capture	5.0%	7.0%
<i>Projected Demand (000s)</i>	354.88	496.83
<i>Note: Currently, the Springfield area constitutes about 3.5 percent of the total county office market.</i>		
<i>Estimated % of office space users by industry:</i>		
<i>Services - 55%; FIRE - 75%; TCU - 75%</i>		
<i>Assumes 175 square feet per employee</i>		
<i>Source: Metropolitan Washington Council of Governments;</i>		
<i>County Business Patterns; and Economics Research Associates</i>		

Two capture rates were applied in order to demonstrate both baseline and optimistic scenarios. While the inventory of the Springfield submarket currently accounts for only 3.5% of the Fairfax county market, higher capture rates were used for the 2000 to 2010 projection. Although Springfield's vacancy rate is still higher than that of

the county, a decreasing vacancy rate and the success of Metro Park after several years without new office construction indicate that there is increased potential for greater capture in the years to come. As shown, based on employment growth, the Springfield area can support up to 500,000 square feet of new office space over the next ten years. This figure represents estimated levels of future demand. The recent additions to the office market in Springfield are responsive to current market conditions and not necessarily reflective of demand potential in the long-run. As such, recent expansions at Metro Square are not anticipated to effect our ten year forecast of demand for office space.

Housing Market

Industry Trends

The housing market in the Washington metro area continues to flourish as demand has grown markedly in the past several years. From 1995 to 1999, the number of building permits issued in the metro area increased by nearly 30 percent. Another indicator of the area's demand for housing is fluctuation in population. According to the Metropolitan Washington Council of Governments, between 1990 and 2000 the population of the region increased from 3.92 million to 4.45 million; a growth of 13.4%. The growth in Fairfax county has outpaced the region with an increase in population of 18% and households of nearly 21% from 1990 to 2000.

Population and Households, 1990 to 2000

	1990	2000	% Change
Population (000s)			
Fairfax County	818.6	968.2	18.3%
Metro Region	3923.6	4450.3	13.4%
Households (000s)			
Fairfax County	292.3	353.4	20.9%
Metro Region	1459.3	1679.2	15.1%

Source: MWCOG; Economics Research Associates

The median housing values in the county reflect the expanded demand. In 1999, the median value for a single-family home in Fairfax county was \$238,185. The following table presents median housing values by housing type and planning district.

Median Market Value of Housing Unit by Type by Planning District, 1999

Planning District	Single-Family	Townhouse	Condo	Overall
Annandale	\$206,938	\$155,620	\$60,679	\$189,888
Baileys	\$225,405	\$163,184	\$73,095	\$142,627
Bull Run	\$240,545	\$132,500	\$93,706	\$170,318
Fairfax	\$279,261	\$163,883	\$90,368	\$210,469
Jefferson	\$185,761	\$160,340	\$76,252	\$170,000
Lincolnia	\$198,301	\$163,000	\$64,972	\$175,000
Lower Potomac	\$170,189	\$110,672	\$96,262	\$119,090
McLean	\$346,078	\$231,548	\$125,848	\$299,873
Mount Vernon	\$224,258	\$103,989	\$77,472	\$165,163
Pohick /1	\$240,000	\$134,333	\$91,157	\$206,556
Rose Hill	\$188,735	\$167,901	\$113,186	\$170,571
Springfield	\$185,325	\$142,527	\$65,897	\$166,460
Upper Potomac /2	\$269,660	\$140,168	\$71,664	\$210,649
Vienna /3	\$255,548	\$173,777	\$72,319	\$235,322
Fairfax County	\$238,185	\$141,711	\$82,711	\$192,110
Springfield % of County	77.8%	100.6%	79.7%	86.6%

1/Includes Clifton; 2/Includes Herndon; 3/Includes Vienna

Source: Fairfax County Government: "Fairfax County Housing Information"

<http://www.co.fairfax.va.us/comm/demogrph/demrpts/mktvdpd.htm>

While the median market value of townhouses in Springfield is on pace with the county as a whole, there is only one submarket, Lower Potomac, that has a lower median value for single-family units and only two submarkets, Annandale and Lincolnia that have lower median market values for condominiums.

The Washington Metro region's apartment market remains very tight. Absorption levels have hovered around the 6,000 unit mark for the last few years and the vacancy rate for all stabilized projects decreased from 1.1 percent to .8 percent during 2000. The market in Northern Virginia is tight as well, but has shown preliminary signs that it may be peaking. Although absorption has continued at a good pace, it has been unable to keep up with construction and vacancy rates have increased slightly (up from .6 percent to 1.1 percent for garden apartments). Springfield contains 1,350 of the county's 57,000 units (2.4 percent). Average monthly rent in the county approximates \$1,000 per month. Springfield has not been far off the mark with an average monthly rent of \$970 in the submarket.

Recent Development Activity

ERA looked at recent new residential development activity within the Springfield submarket. Given the constraints of the study area, townhouse development trends seem most relevant (perhaps as part of a new town development). As reflected below, 242 new townhouse units have been planned since May of 1999. Builders are reflecting sales of about 4 units per month within various subdivisions. Townhouse units are selling for \$85 to \$138 per square foot.

Single Family Homes

James Creek The project opened on April 17th of 2000 and is located near the intersection of Center and Rolling roads. A total of 38 units are planned and the base price ranges from \$435,000 to \$460,000 (\$148 to \$175 per square foot). As of the end of January, 23 units had been sold (at a rate of 2.7 per month).

Forest at South Run The project opened on November 21st of 1998. A total of 55 units were planned and the base price ranged from \$280,000 to \$365,000 (\$123 to \$156 per square foot). All units have been sold (at a rate of 3.0 per month).

Silverbrook Hunt The project opened on March 9th of 1999 and is located near the intersection of Pohick and Silverbrook roads. A total of 8 units were planned and the base price ranged from \$323,000 to \$353,000 (\$96 to \$135 per square foot). All units have been sold (at a rate of .7 per month).

Townhouse/DuPlex

Forest at South Run (Richmond American Homes) The project opened on May 15th of 1999. A total of 79 units were planned and the base price ranged from \$107,000 to \$192,000. All units have been sold (at a rate of 4.26 per month).

Forest at South Run (Centex Homes) The project opened on September 15th of 1999. A total of 45 units were planned and the base price ranged from \$175,000 to \$198,000. All units have been sold (at a rate of 4.74 per month).

Manchester Woods The project opened on October 1st of 2000. A total of 118 units are planned and the base price averages \$308,000. To date, 22 units have been sold. This development is not an expansion of an existing subdivision. Manchester Woods estimates that it will build out within 1 to 1 ½ years. The development is located at Fairfax Parkway and Bonniemill Road.

Planning Targets

ERA has developed estimates for additional housing units based on projected population growth from 2000 to 2010. The principal assumptions of this estimate are

that Springfield will maintain a constant share of the Fairfax County population, and that the number of people per household in Springfield will continue at the 1999 level of 2.8. The computation indicates that in the Springfield planning district (which is depicted in the Appendix of this report, and is larger than the study area), from 2000 to 2010 there will be sufficient increased demand to support the construction of 2,622 additional units. However, it should be noted that a portion of this new demand may be met by the availability of existing housing units, rather than new construction.

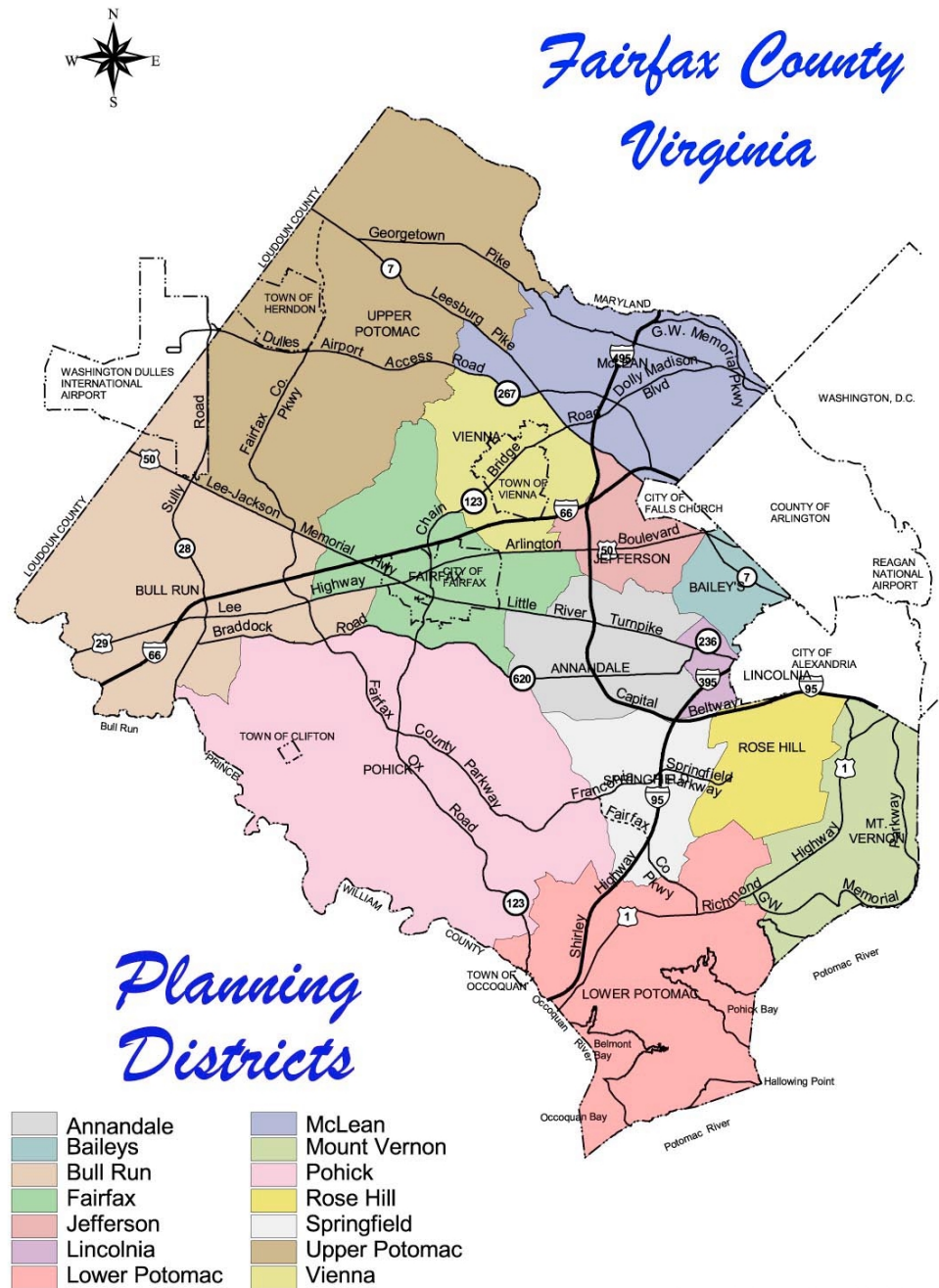
According to "Demographic Reports 1999", a report of the Fairfax County Urban Development Information System, build out is expected to occur in the county on land currently planned for medium to high density residential development between 2005 and 2015. Lower density development, however, is anticipated to continue throughout the remainder of the 25 year forecast period.

The following table illustrates the results.

Population Forecasts for Fairfax County and Springfield Planning District in 000s			
	<u>2000</u>	<u>2005</u>	<u>2010</u>
*Fairfax County	968.2	1045.4	1112.9
**Springfield Portion	5.07%	5.07%	5.07%
Springfield Population	49.1	53.0	56.5
 Estimated Demand for Additional Housing Units in Springfield Planning District, 2000 to 2010			
	<u>2000</u>	<u>2005</u>	<u>2010</u>
Springfield Population	49,129	53,046	56,471
Springfield Persons/HH	2.8	2.8	2.8
Estimated Number of HH	17,546	18,945	20,168
Demand for Additional Housing Units, 2000 to 2010:			2,622
* MWCOG forecast numbers			
**Derived from Fairfax County Dept of Systems Management for Human Services "Demographic Reports 1999"			
Source: WMCOG, Fairfax County Department of Systems Management for Human Services, and Economics Research Associates			

APPENDIX

- Springfield Planning District Map
- Demographics, Industry Trends
- Case Studies
- Land Parcel Maps



Courtesy of Fairfax County GIS and Mapping Services

Town Center Case Studies

Reston Town Center - Highlights

—Located 18 miles west of Washington DC and 7 miles east of Washington Dulles Airport, the center includes two 11-story, 250,000 square foot office buildings and 40,000 square feet of low-rise professional space. Also included is a Hyatt Regency Hotel, 13-screen multi-plex cinema, 240,000 square feet of retail space, and parking for over 3,000 cars.

—Reston Land Company (RLC), a subsidiary of Mobil Land Development Corporation, was Reston's master developer since 1978.

—RLC chose Himmel/MKDG as co-developer of the urban core. RLC purchased Himmel's interest in the partnership once the project was completed but retained Himmel as property manager.

—The project required rezoning from Fairfax County – a process which took three years due to traffic issues. Ultimately performance zoning was implemented. Shared parking was negotiated in order to reduce parking requirements. Also, RLC included a cultural center within the project. The maximum floor/area ratio for the Urban Core is .94.

—Retail space was 85 percent leased when the project opened. The primary trade area extends 10 miles in all directions. Prospective tenants were approached three years before completion of the project and several required co-tenancy leases since the center is anchorless.

Valencia Town Center

—Valencia is a master-planned community designed by Victor Gruen. Construction of Town Center Drive began in 1996 – four years after the opening of Valencia Town Center, a 790,000 square foot regional mall. Town Center Drive includes a mix of retail, restaurants, office, entertainment and hotel space.

—The design was inspired by the commercial districts of San Francisco and the Napa Valley community of St. Helena.

—The project was divided into quadrants since the street was too long to energize a complete retail district.

—The leasing strategy for Town Center Drive was to accommodate the nearby high-end market, and to also concentrate on less well know, regional tenants. The Drive is home to Mission Renaissance, a high-end concept that teaches children to paint.

—In order to concentrate retail, the second half of the drive houses a health club, Hyatt Hotel, and residential townhomes.

II. Physical Feasibility Analysis

Springfield Town Center Feasibility Analysis

Analysis of the Physical Feasibility of Developing a Springfield Town Center

Strategic Land Planning, Inc., tested the physical feasibility of developing a Town center in Springfield by preparing a prototypical plan for development of the area. This plan was designed to:

- address the existing commercial area of Springfield located in the northwest quadrant of I-95 / Old Keene Mill Road interchange
- reflect the goals for Springfield articulated by the Central Springfield Area Revitalization Council (C-SPARC)
- consider the existing physical features of the land and built environment
- consider information collected through interviews with stakeholders in the study area
- use the market data developed by Economics Research Associates
- incorporate transportation improvement recommendations developed by Gorove-Slade and Associates, Transportation Engineers.

The goal of Strategic Land Planning's work was to test the feasibility of the Town Center concept and provide a vision of what it could look like. The plan is not intended to dictate a definitive design for the Town Center, such design to be left to the future developers and builders of the center as guided by the County's Comprehensive Plan and development regulations.

The Town Center Study Area

Figure 1 shows the study area for the Springfield Town Center feasibility analysis. Interstate 95 forms the eastern boundary of the area, and Old Keene Mill Road, the southern boundary. The single-family residential areas of Yates Village and Monticello Forest form the northern and western boundaries respectively. Major east-west roads serving the study area include Old Keene Mill Road and Commerce Street. Major north-south roads are Backlick Road and Amherst Avenue. Brandon Avenue provides vehicular access directly from I-95 (Southbound ramp to Old Keene Mill Road) and Commerce Street, while Bland Street provides internal east-west access.



Figure 1 - Springfield Town Center Study Area

Goals for the Springfield Town Center

C-SPARC has expressed the following **Goals for the Springfield Town Center**:

- develop a mixed-use center where people can live, work and shop
- improve walkability and reduce dependency on the automobile
- enhance the area's attractiveness
- create a "sense of place" by defining a center for Springfield

Through mixed-use development, C-SPARC hopes to avoid typical, suburban development and create a memorable place, much like what has been done at Reston Town Center, Shirlington, and Bethesda Row. Design concepts used in these places should be used in the Springfield Town Center. These **Town Center Design Concepts** include:

- Buildings oriented close to the street
- Wide sidewalks with outdoor seating
- Public spaces
- Traffic calming, including on-street parking
- High quality urban design, including streetscaping and varied signage

Existing Physical Features and the Built Environment

The study area currently is highly developed with few natural features remaining. The topography is relatively flat, and there are no major wooded areas or streams. The primary natural feature of note is the high water table, hence the name "Springfield." This high water table precludes basements and underground parking structures.

The area is primarily commercial in character. Major shopping centers include Springfield Plaza, Commerce Plaza, Concord Centre and Springfield Tower Center. Major office buildings are Springfield Tower, Springfield Corporate Center and Doctor's Center. Ringing the study area on the west side is the 220-unit apartment complex, Springfield Gardens. Adjacent to the apartments on Commerce Street near Old Keene Mill Road is the Richard Byrd Branch Library operated by Fairfax County. Table 1 provides a summary of existing development in the study area by block.

Table 1 - Summary of Existing Development
Springfield Town Center Study Area

Land Bay	Ac.	Retail	Office	Res.	Hotel	Civic	Total	FAR
A								
A-1	10.39	4.5	142.5	0.0	63.4	0.0	210.4	0.46
A-2	12.02	140.9	30.0	0.0	0.0	0.0	170.9	0.33
A-3	9.40	38.0	36.3	0.0	108.0	0.0	182.3	0.45
A-4	14.43	109.3	82.4	0.0	0.0	0.0	191.7	0.30
Subtotal A	46.24	292.7	291.2	0.0	171.4	0.0	755.3	0.37
B	9.43	58.4	6.0	32.0	0.0	0.0	96.4	0.23
C	51.00	488.1	7.0	243.2	0.0	9.8	748.1	0.34
D	4.45	24.7	3.3	0.0	0.0	0.0	28.0	0.14
TOTALS	111.12	863.9	307.5	275.2	171.4	9.8	1627.8	0.34

Note: All figures are approximate and are to be used for conceptual planning purposes only.

Stakeholder Interviews

From stakeholder interviews, Strategic Land Planning was able to learn the following regarding the potential and needs for the physical redevelopment of Springfield:

- Most interest on the part of the private sector in the redevelopment of Springfield lies in the portion of the study area east of Backlick Road.
- Commerce Street and Old Keene Mill Road are too traffic-filled to be the focus of a walkable town center. Bland Street and Brandon Avenue have better potential for the creation of walkable town center “main streets.”
- There are opportunities and interest in the development of a signature mixed-use gateway building adjacent to and with high visibility from Interstate 95.
- The arts community is very interested in obtaining space for the performing and visual arts within the town center.
- Surrounding single-family residential areas will be very sensitive to the intensity and height of redevelopment in the study area.
- Traffic impacts of the new town center must be minimized.

Market Analysis

Economics Research Associates’ market analysis for Springfield can be summarized as follows:

- Sufficient market demand exists to support a town center offering 150,000 to 250,000 square feet of retail space.
- The demand for new hotel space is limited.
- Based on employment growth, the Springfield area can support up to 500,000 square feet of new office space.
- Sufficient market demand exists to accommodate significant growth in housing units in the study area.
- There is great interest in arts space, but the County will need to create incentives for developers to provide such space.

Transportation Issues

The report by Gorove-Slade provides an in-depth analysis of the current and projected traffic situation for the study area. Recent improvements to the transportation system in the area have greatly improved its traffic handling capacity, particularly improvements to Commerce Street. Once “Mixing Bowl” improvements are complete, some of the existing traffic congestion and confusion will be reduced. Two transportation needs identified by Gorove-Slade include a new parking facility for commuters and turning movement controls and traffic channeling on Amherst and Cumberland Avenues near Backlick Road. The best location for a commuter parking facility on the north side of Old Keene Mill Road, based on the current analyses, is the block bounded by Old Keene Mill Road, Amherst Avenue, Bland Street, and Backlick Road. The County is currently studying commuter parking needs in the Springfield area in more detail, which may result in a different recommendation for the location of commuter facilities.

The Prototypical Development Plan

Based on the factors described above, Strategic Land Plan developed a Prototypical Development Plan (PDP) for Springfield Town Center, presented in Figure 2.

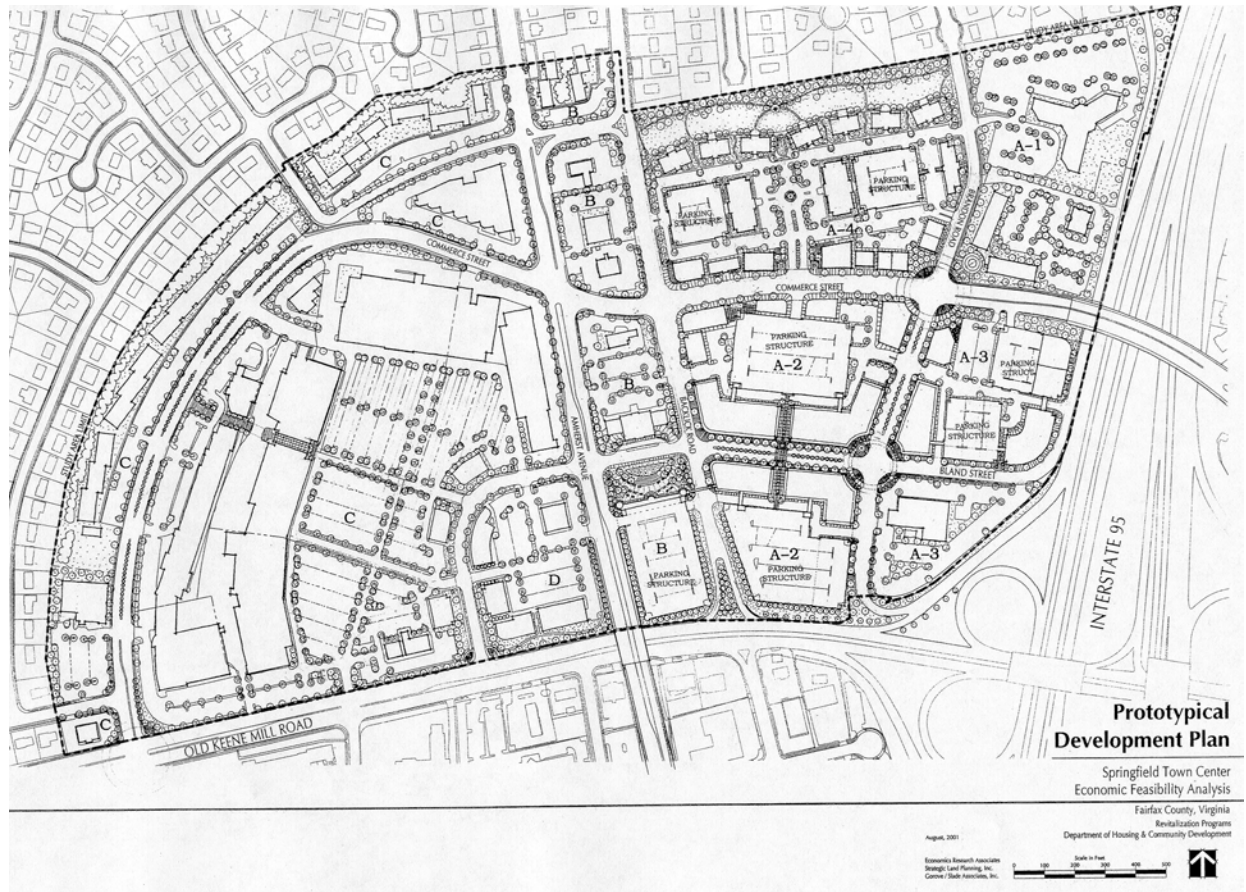


Figure 2 - Prototypical Development Plan

The PDP creates a Town Center with Bland Street as its “Main Street” and Brandon Avenue as its “Second Street.” The commercial focal intersection is at Bland and Brandon, while the civic center of the community is located on Bland Street between Amherst and Backlick. Here, a farmers’ market and cultural center are planned. Bland Street also provides the connecting link between the existing shopping centers to remain in the western part of the Town Center and new office and residential towers planned in the east. Commerce Street continues its important contributions to traffic flow as a landscaped boulevard, while Concord Centre is shown redeveloped into an urban office block with a landscaped park buffering residential areas to the north. Figure 3 offers a birds-eye sketch of the Town Center as shown in the PDP.

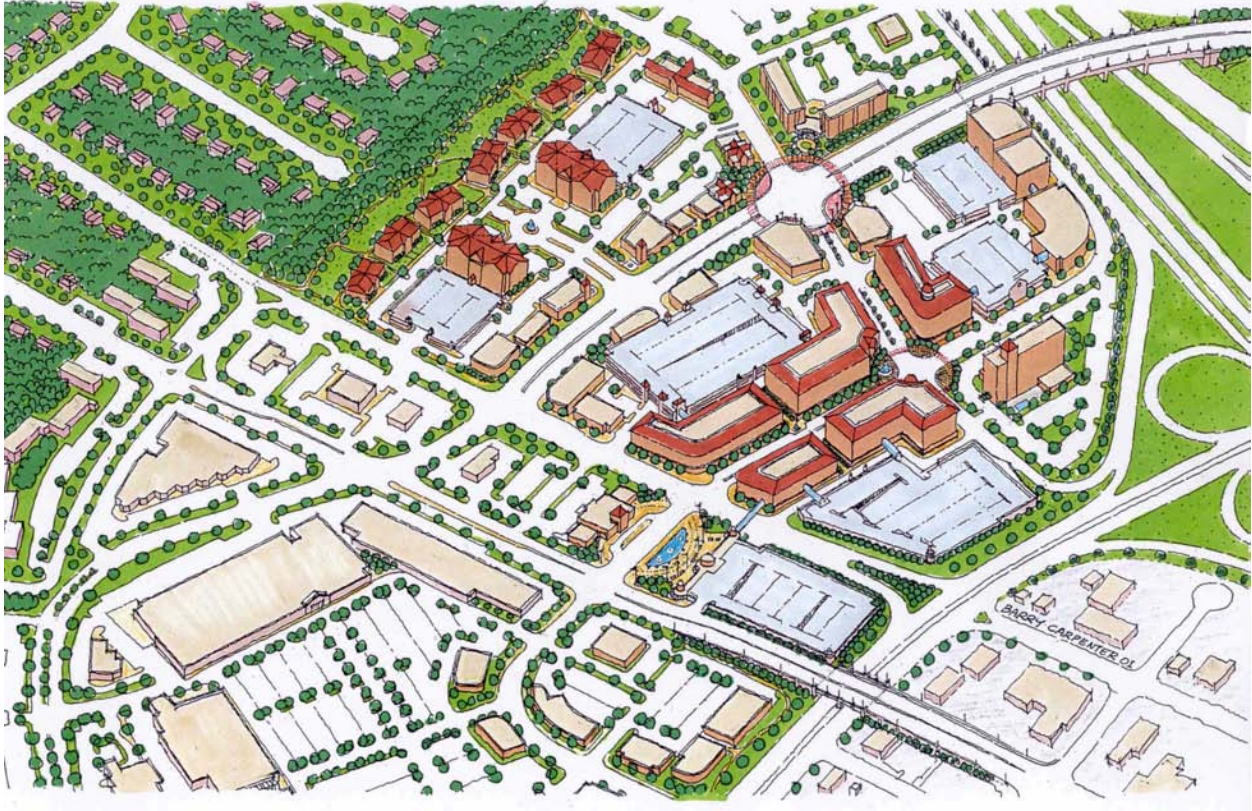


Figure 3 - Town Center Overview

The following describes elements of the plan in more detail:

- Mixed-use buildings of four to six stories with retail on the ground floor and office or residential uses on the upper floors hug the new “Main Street” in the focal block of Bland Street between Backlick Road and Brandon Avenue. Space for the arts could be provided on mezzanine levels. Wide sidewalks offer plenty of space for outdoor dining. Ample parking is provided in decks behind the buildings with on-street parking offering convenient short-term spaces as well as acting to calm traffic speeds. The parking deck behind the buildings on the south side of Bland Street is penetrated on the ground level by a large retail space facing Brandon Street. Mid-block mini-parks along Bland Street serve as pedestrian links to the parking decks. High quality landscaping with street furniture makes this Main Street attractive to shoppers, office workers and residents. The intersection of Bland and Brandon receives special landscape attention. Figure 4 illustrates Bland as Main Street with this focal intersection in the center.



Figure 4 - Town Center "Main Street" at Bland and Brandon

- The block of Bland Street east of Brandon continues the Main Street urban design concept with a seven-story retail/residential building on the corner and office buildings curving around toward I-95. A gateway office building of six and eight stories orients to I-95 and Commerce Street. This block is also served by parking structures located mostly behind buildings. The parking structure along Bland between the residential and office buildings is designed to be faced with retail shops on the ground level. The Holiday Inn is shown remaining as is. The Figure 4 bird-eye sketch also illustrates this block.
- The block of Bland Street between Backlick and Amherst becomes the civic “heart” of Springfield. The PDP shows a new two-story Springfield Cultural Center for the performing and visual arts on the north side of Bland Street. The public “New Spring Market” on the south side provides stalls for produce, food, and crafts. The market is designed to front a new two-story commuter parking deck of 400 spaces. In front of the market along Bland Street is a public plaza for community events, illustrated in Figure 5. Featuring a fountain / ice rink with green space and special paving, this plaza should provide an attractive, high quality public image for the Town Center.



Figure 5 - "New Spring Market" and Public Plaza

- Bland Street as Main Street continues across Amherst and curves to connect to Old Keene Mill Road. Here, new low-scale retail buildings and enhanced plantings and sidewalks are added at the edge of the Springfield Plaza parking lot to complete the streetscape. The parking lots behind are shown realigned and landscaped to provide better organized circulation and a more attractive appearance. A new pedestrian connection through the Springfield Plaza building links neighborhoods to the west to the Town Center.
- Commerce Street is shown as a landscaped boulevard with one and two story commercial buildings lining it. These buildings could offer retail, office or a mix of these uses. The specially landscaped intersection of Commerce and Brandon Streets offers a green gateway to the Town Center. The gateway intersection is illustrated in Figure 6.
- The PDP shows an office redevelopment plan for the existing Concord Centre site and adjacent properties. Two five-story office buildings face a landscaped roundabout in the center of the block. These buildings and the surrounding buildings are served by two parking decks hidden behind them. To the north, redevelopment steps down in intensity to residential-scaled two and three story office buildings flanked on the north by a wide, heavily landscaped park.



Figure 6 - Commerce Street Gateway

Prototypical Development Program

The ultimate program of development is summarized in Table 2. The program shows a town center retail area focused in blocks A-2 and A-3 of 262,000 square feet, at the high end of the supportable market identified by ERA. This new retail space replaces 179,000 square feet of existing retail space for a net gain of 83,000 square feet. The overall plan, however, only increases retail space in the study area by about 20,000 square feet. This is due to the replacement of the retail Concord Centre with mostly office space. A substantial increase in retail space was not achieved because retail as a development form occurs almost entirely on the ground level of buildings. The study area is already very nearly built out in ground level retail. Only the placement of parking underground could have provided additional ground level space for retail, but the high water table prevented this solution.

The PDP adds 416,000 square feet of office space compared to the market demand for 500,000 square feet in the Springfield area. Residential uses are increased by 207,000 square feet, or 135 to 200 units. Civic space (arts, farmers' market) increased by 47,000 square feet.

**Table 2 - Summary of Prototypical Development Plan
Springfield Town Center Study Area**

Land Bay	Ac.	Retail	Office	Res.	Hotel	Civic	Total	FAR
A								
A-1	10.39	4.5	142.5	0.0	63.4	0.0	210.4	0.46
A-2	12.02	212.0	137.0	310.0	0.0	20.0	679.0	1.30
A-3	9.40	50.0	160.0	96.0	108.0	0.0	414.0	1.01
A-4	14.43	39.0	271.5	0.0	0.0	0.0	310.5	0.49
Subtotal A	46.24	305.5	711.0	406.0	171.4	20.0	1613.9	0.80
B	9.43	26.7	6.0	32.0	0.0	20.0	84.7	0.21
C	51.00	507.1	7.0	243.2	0.0	17.3	774.6	0.35
D	4.45	43.4	0.0	0.0	0.0	0.0	43.4	0.22
TOTALS	111.12	882.7	724.0	681.2	171.4	57.3	2516.6	0.52

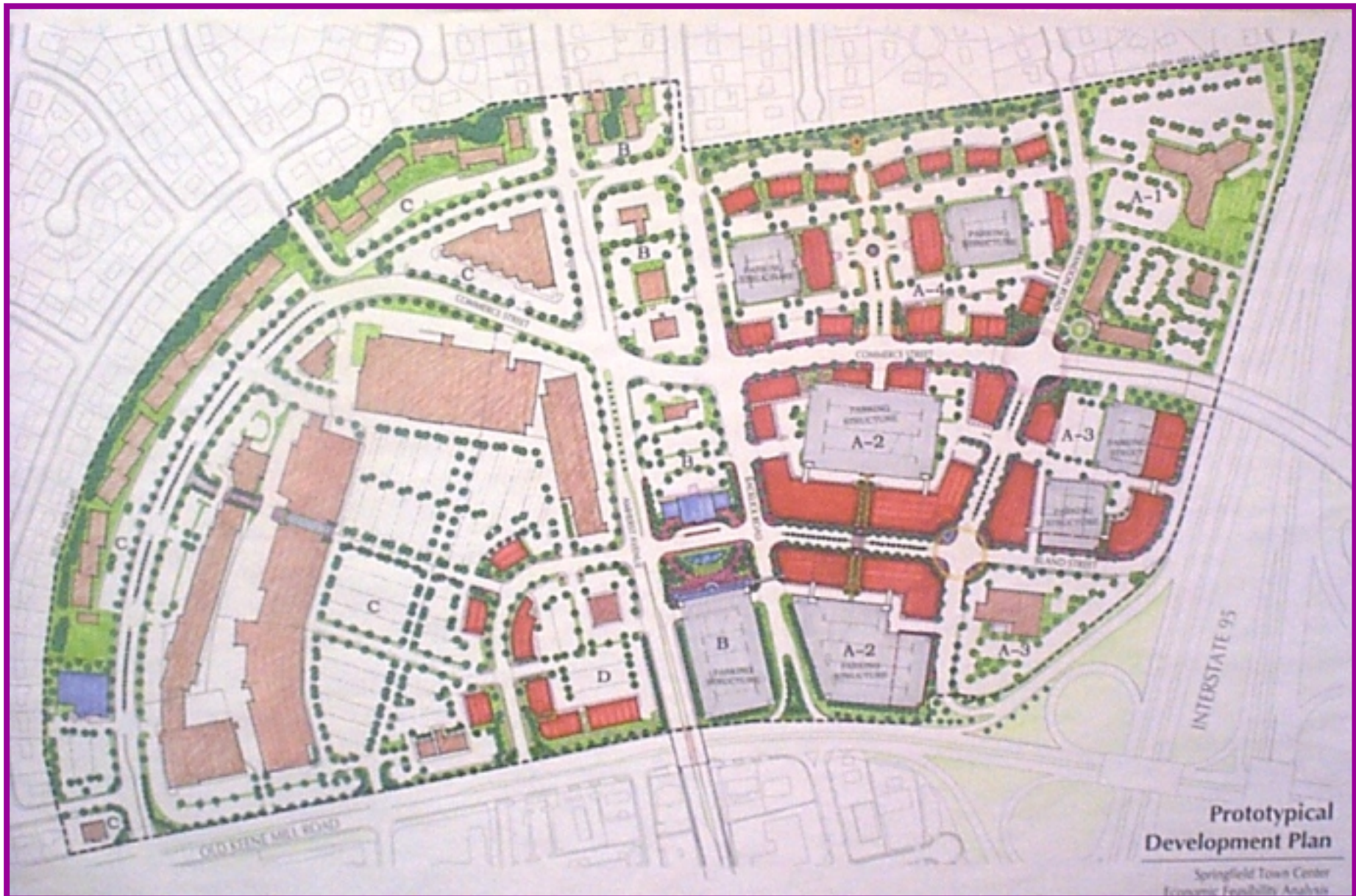
Note: All figures are approximate and are to be used for conceptual planning purposes only.

Appendix

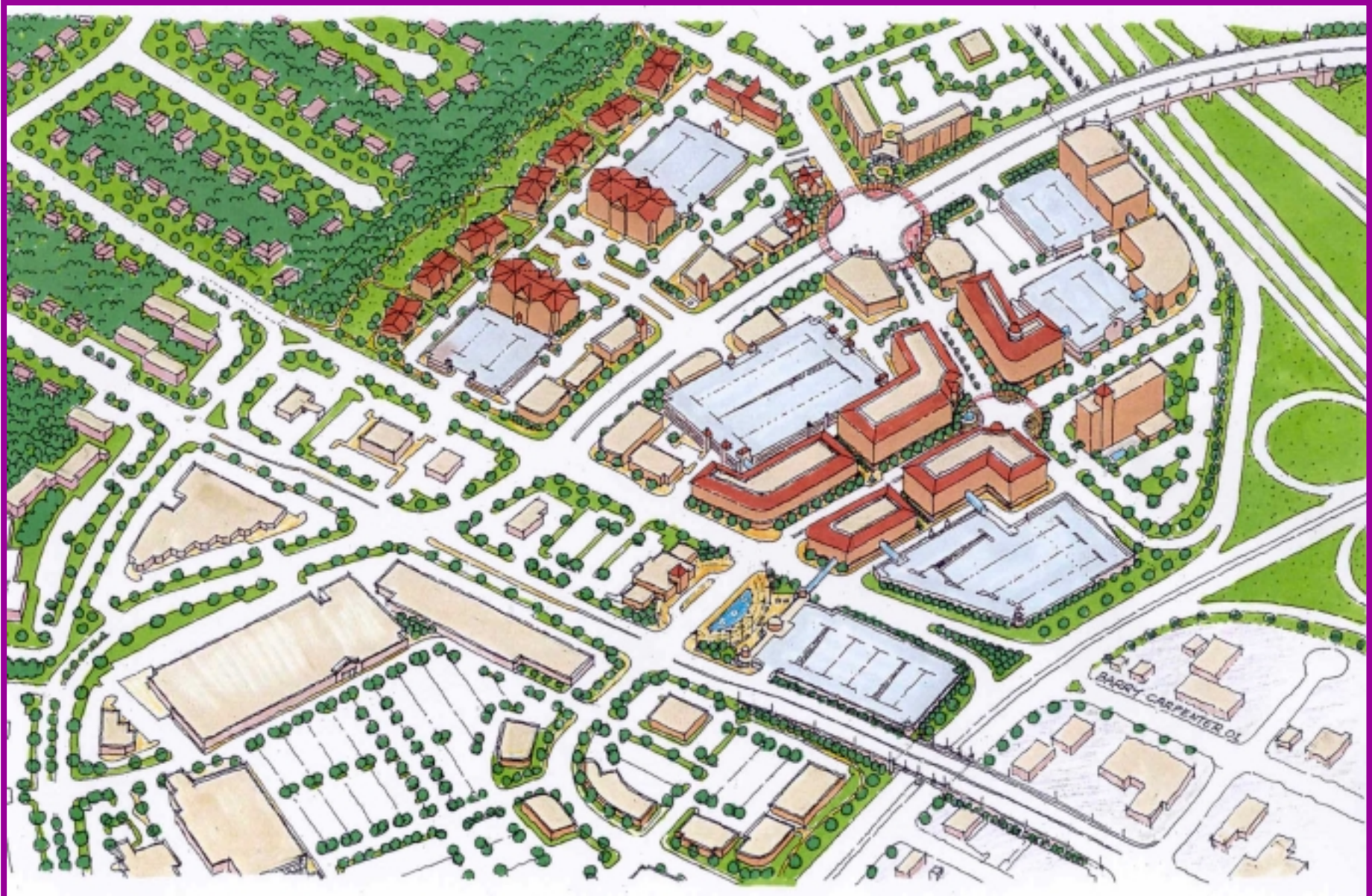
Land Bay	Parcel #	Acreage	Existing Land Use	Zoning	# stories	Year Built	Year Remodeled	Notes
A-1	080-4-01-5C	4.34	Vacant	C-6	4	2001		Under construction. Marriott Town Plaza Suites
A-1	080-4-01-5D	6.05	Office	C-6	5	1987		Springfield Corporate Center
Total A-1		10.39						
A-2	080-4-01-6	6.47	Retail	C-6	1	1960	1989	Tower Center shopping center (Federal Realty Investment Trust)
A-2	080-4-01-7	0.27	Retail	C-6	1	1956	1977	Shell gas station (closed)
A-2	080-4-01-7A	0.20	Retail	C-6	1	1960	1989	Tower Center shopping center (Federal Realty Investment Trust)
A-2	080-4-01-8A	0.45	Retail	C-6	1	1960	1982	Mattressland & Carpetland
A-2	080-4-01-8B	0.40	Service	C-6	1	1967		Goodyear Tire dealership
A-2	080-4-06-3	1.32	Service	C-8	3	1962	1967	Bank of America
A-2	080-4-06-4C	2.91	Retail	C-8	1	1964	1970	Dodge auto dealership
Total A-2		12.02						
A-3	080-4-01-4	0.30	Service	C-8	1	1966		Colonial Animal Hospital
A-3	080-4-01-4B	0.55	Restaurant	C-6	1	1960	1986	McDonald's
A-3	080-4-01-4F	5.48	Retail	C-6	varied	1960	1979	1-story retail (Total Beverage), 12-story office bldg, 1-story restaurant (Bob Evans) (FRIT)
A-3	080-4-01-6A	3.07	Hotel	C-4	10	1975	1998	Holiday Inn
Total A-3		9.40						
A-4	080-4-01-1	1.87	Retail	C-6	2	1971	1998	Mixed use shopping center
A-4	080-4-01-1A	1.02	Office	C-6	3	1967	1998	Doctors' Center
A-4	080-4-01-3	6.33	Retail	C-6	1	1961		Concord Centre shopping center
A-4	080-4-01-3A	0.19	Utility	C-6	1	1900		Fairfax County Water Authority
A-4	080-4-06-1	0.35	Retail	C-8	1	1960	1968	7-11 convenience store
A-4	080-4-06-2	0.52	Office	C-8	2	1960		Springfield Medical Arts Building
A-4	080-4-06-4A	0.39	Service	C-8	1	1960		Auto service station
A-4	080-4-06-4D1	0.93	Restaurant	C-8	1	1980	1999	Dragon Sea Buffet
A-4	080-4-06-4D3	1.02	Office	C-8	2	1986		F & M Bank
A-4	080-4-06-4D4	0.52	Restaurant	C-8	1	1970		El Paso Mexican Restaurant
A-4	080-4-06-4D5	0.73	Restaurant	C-8	1	1968	2000	Dunkin' Donuts (new- 2000), Peking Garden (1968)
A-4	080-4-06-4E1	0.55	Retail	C-8	1	1962		Car wash
A-4	080-4-06-A	0.01	Vacant	C-8				vacant
Total A-4		14.43						

Land Bay	Parcel #	Acreage	Existing Land Use	Zoning	# stories	Year Built	Year Remodeled	Notes
B	080-4-01-9	1.20	Restaurant	C-6	1	1954		Dauphine Steak House, large portion of building vacant
B	080-4-01-9A	1.17	Service/Rest.	C-6	1	1984		BB&T Bank (1984), new Kentucky Fried Chicken (2000)
B	080-4-01-9B	1.02	Retail	C-6	1	1954	1993	Mobil gas station
B	080-4-01-9C	0.51	Retail	C-6	1	1979		Midas auto service station (appears to have been recently remodeled)
B	080-4-01-9D	0.79	Service	C-6	1	1978		Burke & Herbert Bank
B	080-4-01-9E	1.01	Restaurant	C-6	2	1986		Mike's American Grill
B	080-4-01-9F	0.76	Restaurant	C-6	1	1999		McDonald's
B	080-4-01-10	1.25	Restaurant	C-6	1	1962	1981	vacant former restaurant building
B	080-4-04-7/8/12	1.72	Residential	R-20	2	1951		Springfield Gardens apartments (Sixth Carr Limited Partnership)
Total B		9.43						
C	080-3-01-3	3.86	Residential	R-20	2	1951		Springfield Gardens apartments (Sixth Carr Limited Partnership)
C	080-3-01-3C	2.06	Library	R-20	1	1965		Richard Byrd Branch Library (public)
C	080-3-01-3D	0.51	Office	C-2	2	1968		Weichert Realty
C	080-3-01-4A	7.60	Retail	C-6	1	1961	2000	Springfield Plaza (Springfield Plaza Limited Partnership)
C	080-3-01-4B	2.74	Retail	C-6	1	1960	1987	Springfield Plaza (Springfield Plaza Limited Partnership)
C	080-3-01-7	6.83	Residential	R-20	3	1964		Springfield Gardens apartments (Sixth Carr Limited Partnership)
C	080-3-01-10	4.68	Retail	C-6	1	1984	2000	Springfield Plaza (Springfield Plaza Limited Partnership)
C	080-3-01-11A	1.70	Retail	C-6	1	1984	2000	Springfield Plaza (Springfield Plaza Limited Partnership)
C	080-3-01-11B	4.22	Retail	C-6	1	1987		Springfield Plaza (Springfield Plaza Limited Partnership)
C	080-3-06-10A	0.93	Retail	C-6	1	1981		Springfield Plaza (A.J. Dwoskin & Assoc.)
C	080-3-06-10B	6.34	Retail	C-6	1	1981		K-Mart
C	080-4-09-10C	6.79	Retail	C-6	1	1981		Springfield Plaza (A.J. Dwoskin & Assoc.)
C	080-4-09-11	2.74	Retail	C-6	1	1983		Commerce Plaza shopping center (A.J. Dwoskin & Assoc.)
Total C		51.00						
D	080-3-01-9	0.96	Restaurant	C-6	1	1978		Shoney's restaurant (vacant)
D	080-4-09-4	0.42	Vacant	C-6	1			vacant parking lot
D	080-4-09-5	0.45	Vacant	C-6				vacant parking lot
D	080-4-09-6	0.76	Retail	C-6	1	1981		Chi Chi's restaurant (vacant)
D	080-4-09-8A	0.85	Vacant	C-6		2001		Kinko's Copies (new)
D	080-4-09-9A	1.01	Service	C-6	1	1981		First Virginia Bank
Total D		4.45						
Total Study Area		111.12						

Prototypical Development Plan



Aerial View - Prototypical Plan



New Main Street at Bland and Brandon



Gateway at Commerce and Brandon



New Spring Market



III. Transportation Planning

Transportation Planning

- **Part I - Planning**

- Transportation Plan Assessment

- Alternative Land Use Concepts

- Preliminary Transportation Recommendations

- **Part II - Operations**

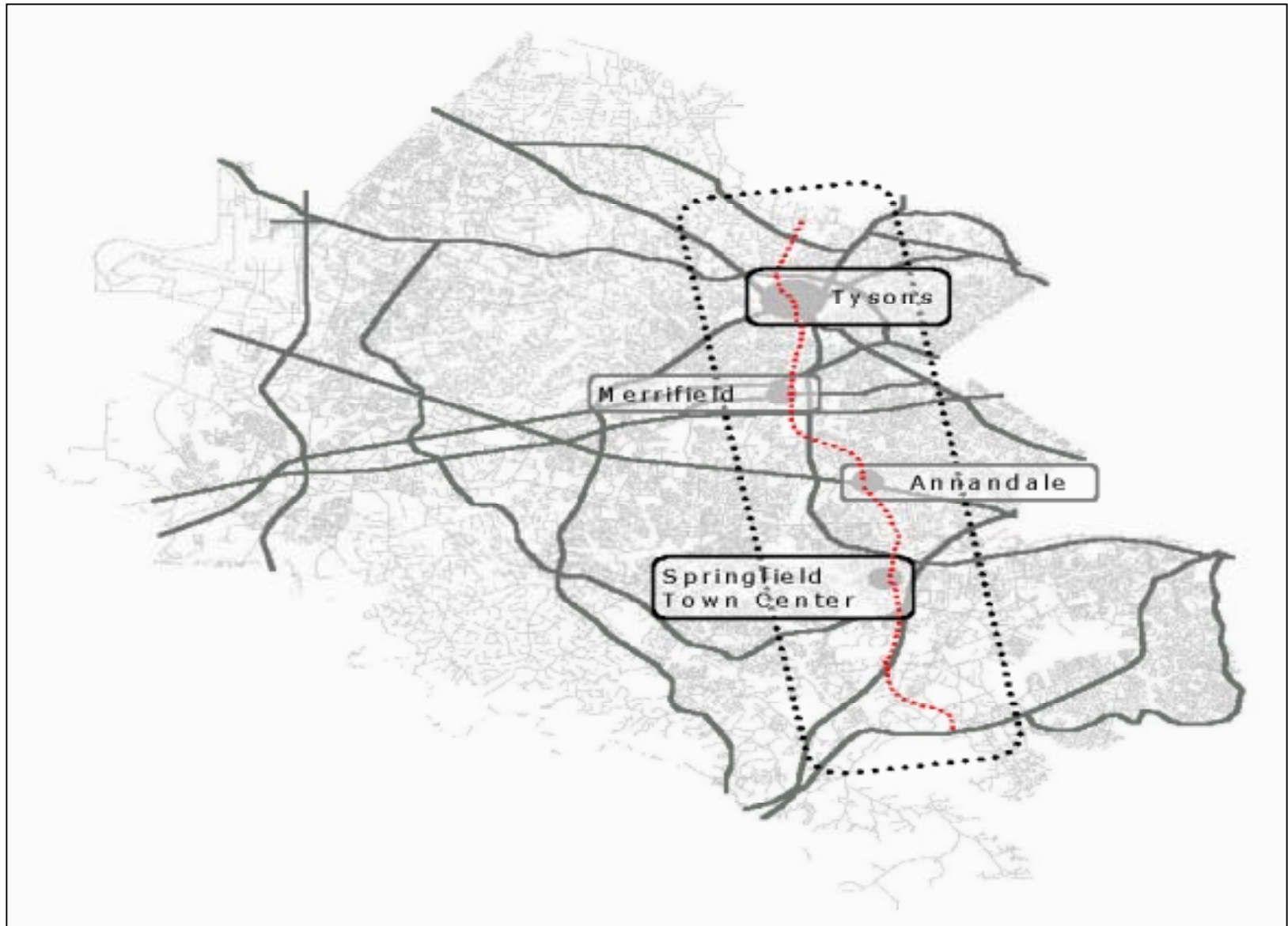
- Commuter Parking

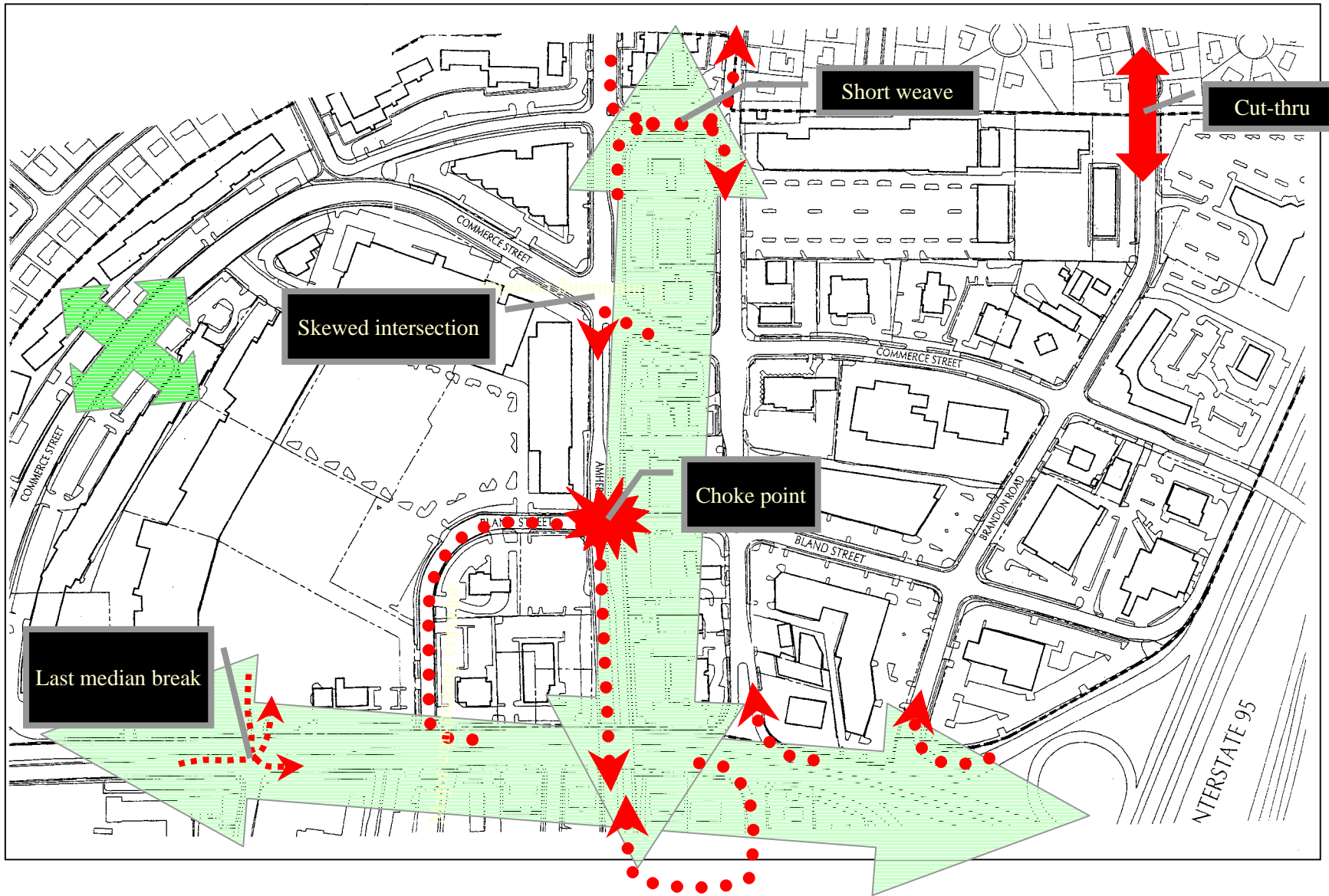
- Old Keene Mill Road Corridor

- Preliminary Commuter Parking Program

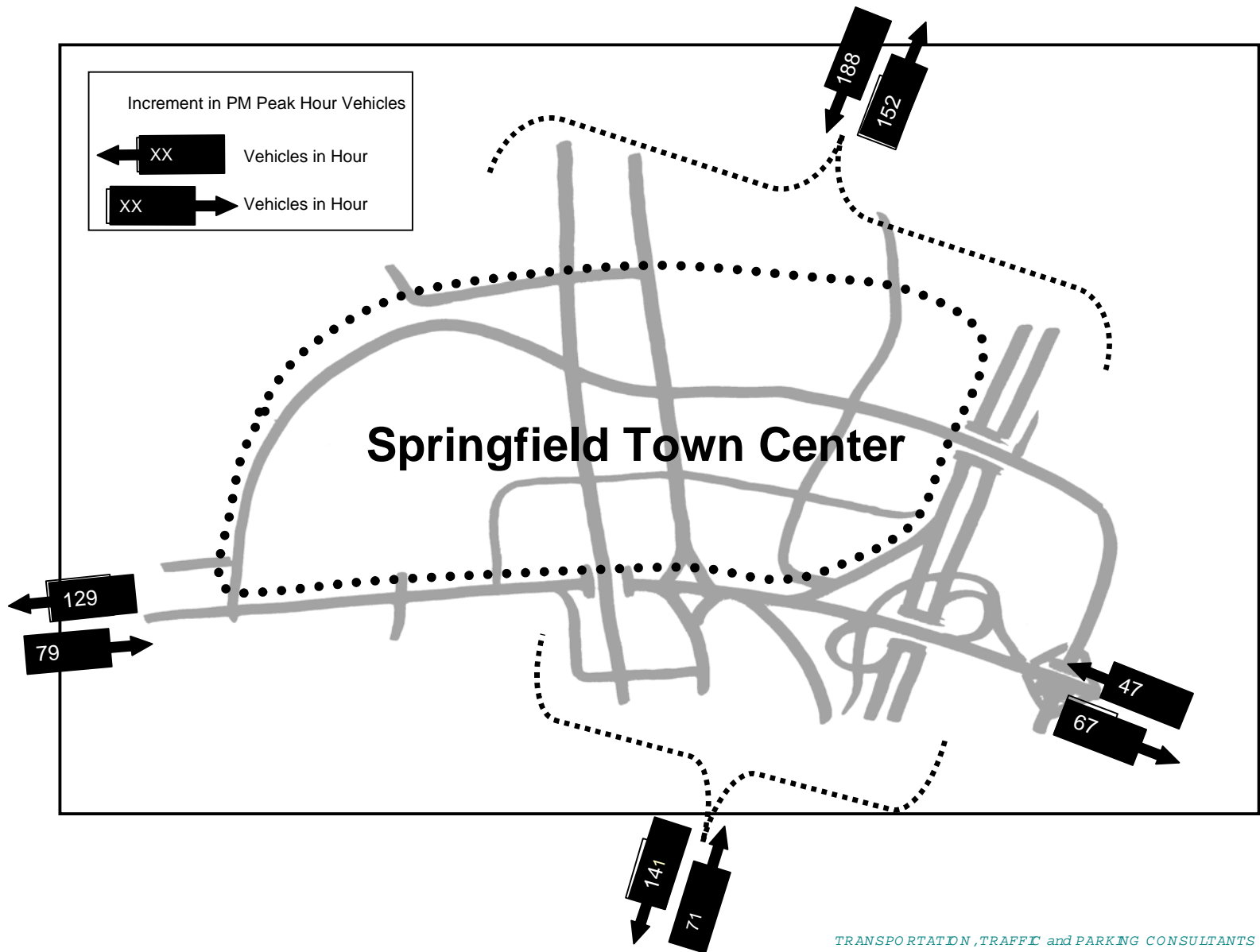
- **Final Report**

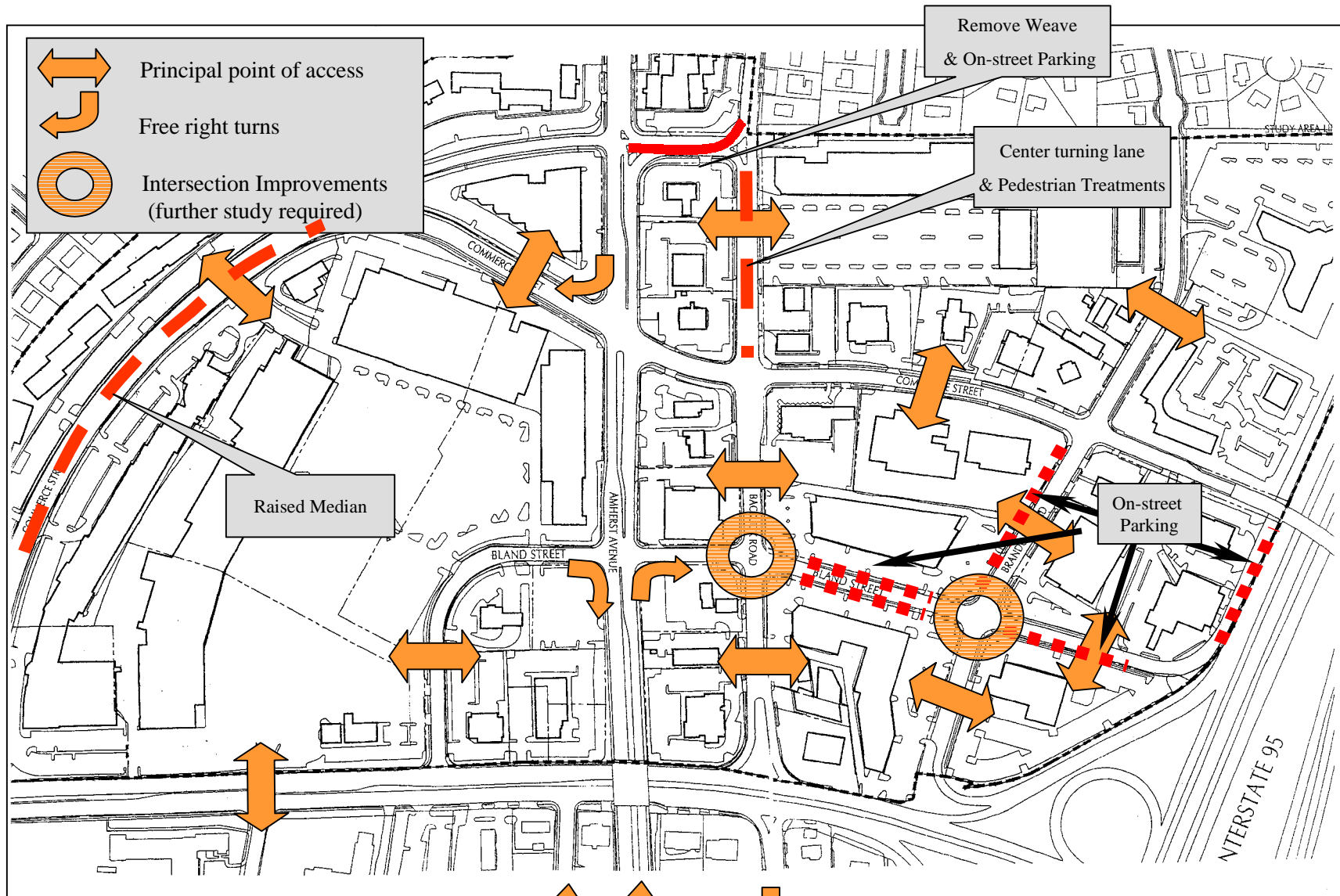
The Freeway Substitute





Access and Circulation Issues





Springfield Town Center

Transportation Recommendations

TRANSPORTATION, TRAFFIC and PARKING CONSULTANTS

GOROVE/BLADE ASSOCIATES, NC.



Prototypical Development Plan - Parking Summary

Springfield Town Center

Strategic Land Planning, Inc.

8/17/01

Parking Spaces for New Development							
Min. parking ratios in spaces/1000 sf	4.0	3.0	1.6	4.0	--		
Land Bay	Retail	Office	Res.	Civic	Commuter	Total	
A							
A-1	--	--	--	--	--	0	(No change from existing)
A-2	848	411	496	80	0	1835	
A-3	225	480	154	0	0	859	(Only block north of Bland Street)
A-4	172	815	0	0	0	987	
Subtotal A	1245	1706	650	80		3681	
B	0	0	0	84	400	484	(Only blocks on either side of Bland Street)
C	--	--	--	--	--	0	(No new spaces; rely on spaces in former commuter lot relocated to Land Bay B)
D	223	0	0	0	0	223	
TOTALS	1468	1706	650	164	400	4388	

Prototypical Development Plan
 Springfield Town Center

Strategic Land Planning, Inc.
 8/17/01

Pre-Revitalization Square Feet in Thousands									Post-Revitalization Square Feet in Thousands							
Land Bay	Ac.	Retail	Office	Res.	Hotel	Civic	Total	FAR		Retail	Office	Res.	Hotel	Civic	Total	FAR
A																
A-1	10.39	4.5	142.5	0.0	63.4	0.0	210.4	0.46		4.5	142.5	0.0	63.4	0.0	210.4	0.46
A-2	12.02	140.9	30.0	0.0	0.0	0.0	170.9	0.33		212.0	137.0	310.0	0.0	20.0	679.0	1.30
A-3	9.40	38.0	36.3	0.0	108.0	0.0	182.3	0.45		50.0	160.0	96.0	108.0	0.0	414.0	1.01
A-4	14.43	109.3	82.4	0.0	0.0	0.0	191.7	0.30		39.0	271.5	0.0	0.0	0.0	310.5	0.49
Subtotal A	46.24	292.7	291.2	0.0	171.4	0.0	755.3	0.37		305.5	711.0	406.0	171.4	20.0	1613.9	0.80
B	9.43	58.4	6.0	32.0	0.0	0.0	96.4	0.23		26.7	6.0	32.0	0.0	20.0	84.7	0.21
C	51.00	488.1	7.0	243.2	0.0	9.8	748.1	0.34		507.1	7.0	243.2	0.0	17.3	774.6	0.35
D	4.45	24.7	3.3	0.0	0.0	0.0	28.0	0.14		43.4	0.0	0.0	0.0	0.0	43.4	0.22
TOTALS	111.12	863.9	307.5	275.2	171.4	9.8	1627.8	0.34		882.7	724.0	681.2	171.4	57.3	2516.6	0.52
Amount of new construction:										367.0	568.5	406.0	0.0	40.0	1375.0	
Percent of new construction:										41.6%	78.5%	59.6%	0.0%	69.8%	54.6%	

Pre-Revitalization Square Feet in Thousands									Post-Revitalization Square Feet in Thousands						
Land Bay	Ac.	Retail	Office	Res.	Hotel	Civic	Total	FAR	Retail	Office	Res.	Hotel	Civic	Total	FAR
A															
A-1	10.39	4.5	142.5	0.0	63.4	0.0	210.4	0.46	4.5	142.5	0.0	63.4	0.0	210.4	0.46
A-2	12.02	140.9	30.0	0.0	0.0	0.0	170.9	0.33	227.0	43.0	176.0	0.0	0.0	446.0	0.85
A-3	9.40	38.0	36.3	0.0	108.0	0.0	182.3	0.45	92.0	140.0	20.0	108.0	0.0	360.0	0.88
A-4	14.43	109.3	82.4	0.0	0.0	0.0	191.7	0.30	32.0	32.0	287.0	0.0	0.0	351.0	0.56
Total	46.24	292.7	291.2	0.0	171.4	0.0	755.3	0.37	355.5	357.5	483.0	171.4	0.0	1367.4	0.68
B	9.43	58.4	6.0	32.0	0.0	0.0	96.4	0.23	19.5	6.0	32.0	0.0	46.0	103.5	0.25
C	51.00	488.1	7.0	243.2	0.0	9.8	748.1	0.34	460.0	198.0	243.2	0.0	9.8	911.0	0.41
D	4.45	24.7	3.3	0.0	0.0	0.0	28.0	0.14	80.0	3.3	0.0	0.0	0.0	83.3	0.43
TOTALS	111.12	863.9	307.5	275.2	171.4	9.8	1627.8	0.34	915.0	564.8	758.2	171.4	55.8	2465.2	0.51
Amount of new construction:									891.0	413.0	483.0	0.0	46.0	1833.0	
Percent of new construction:									97.4%	73.1%	63.7%	0.0%	82.4%	74.4%	