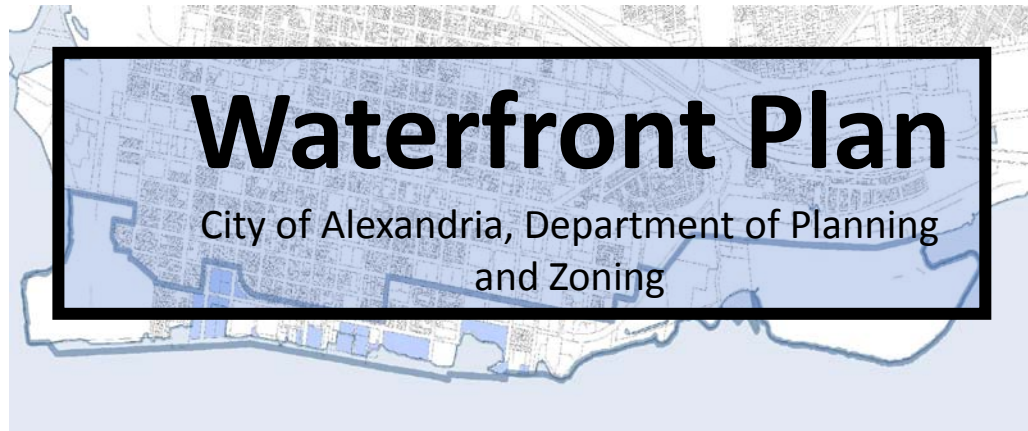




Moffatt and Nichol
Marina Market Assessment Data



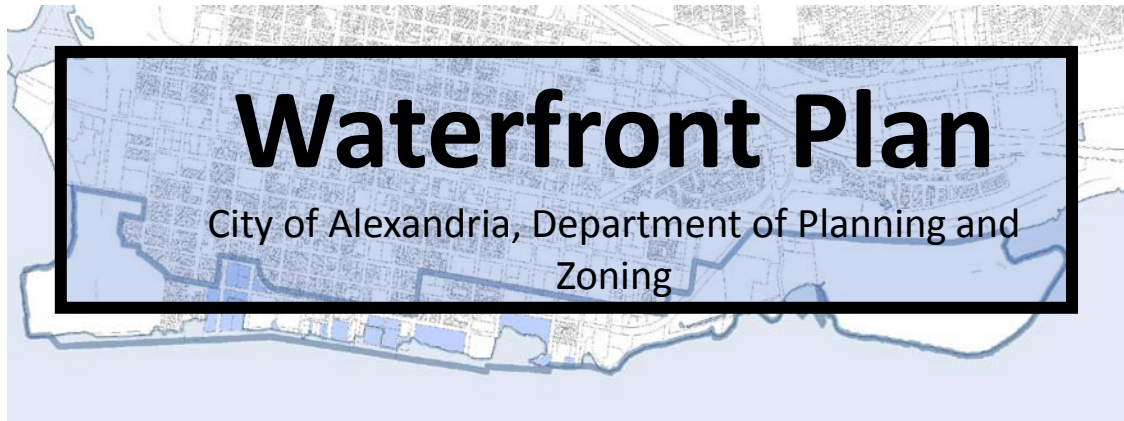
- **Moffatt and Nichol**

- Shoreline Reconnaissance & Inventory data
 - Extent and material of existing shoreline conditions: seawalls, steel or timber bulkheads, riprap, pavement, natural vegetation, etc.
 - Inventory and cursory inspections of structures
- Navigational, Boundary and Environmental Regulations
 - Federal, Regional, State, Local and Other (DC)
- **Marina Area Market data**



Marina Market Data

- Background – City of Alexandria Marina
- Marina Market Area
- Existing Marinas within Marina Market Area
- Marina Size, Amenities and Lease Rates (2009 data)
- Projected Market
- Findings based on Projected Market



Background – City of Alexandria Marina

Size – Total capacity 85 Vessels (slips and docks)

- 57 pleasure boat slips
- 1 fireboat
- 4 transient slips
- 17 T-Head
- 6 commercial lease slips

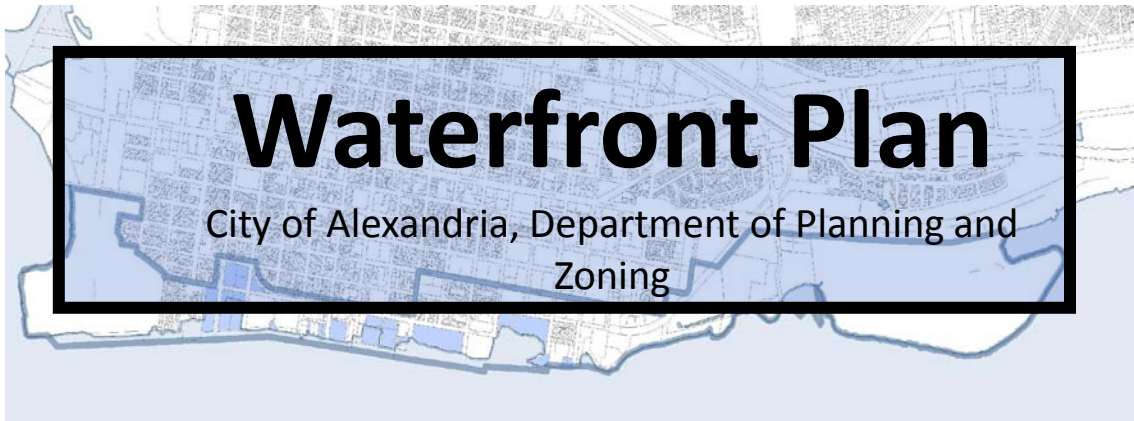
The title 'Waterfront Plan' is centered within a black-bordered box. The background of the box is a light blue map of a waterfront area with a grid of streets and a body of water at the bottom. The text 'City of Alexandria, Department of Planning and Zoning' is positioned below the title.

Waterfront Plan

City of Alexandria, Department of Planning and
Zoning

| REVENUES for City of Alexandria Marina | FY2007 | FY2008 | FY2009 |
|---|-------------------|-------------------|-------------------|
| Pleasure Boat Leases | \$ 106,946 | \$ 96,538 | \$ 127,677 |
| Transient Boat Leases | \$ 18,891 | \$ 15,376 | \$ 16,436 |
| Transient Overnight | \$ 80,688 | \$ 75,363 | \$ 68,578 |
| Commercial | \$ 101,659 | \$ 92,725 | \$ 101,711 |
| Total | \$ 308,184 | \$ 280,002 | \$ 314,402 |

Source: RPCA



| Expenses* for City of Alexandria Marina | FY2007 | FY2008 | FY2009 |
|--|-------------------|-------------------|-------------------|
| Personnel | \$ 151,139 | \$ 384,456 | \$ 358,454 |
| Non-Personnel | \$ 16,677 | \$ 22,660 | \$ 20,067 |
| Total | \$ 167,816 | \$ 407,116 | \$ 378,521 |

Source: RPCA

•**Expenses:** Most marina expenses are incurred in services provided to pedestrian foot traffic and maintenance of tourist destination (pedestrian). Expenses incurred in service of boat traffic is unknown.



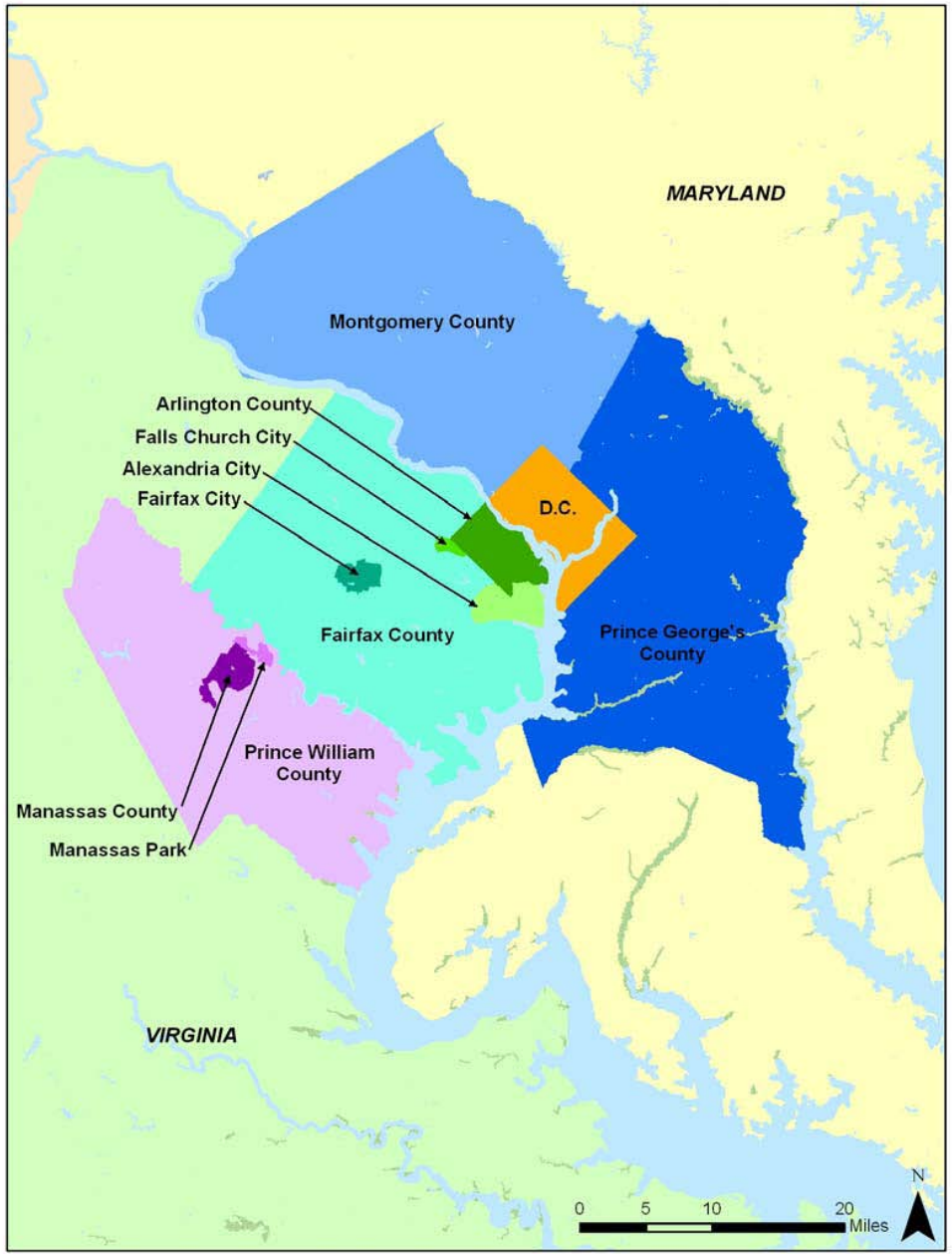
City's Market Area

- M&N suggests that boaters are willing to travel up to one hour from home to reach their boat.
- Marina Market Area – Washington, DC and Montgomery and Prince Georges Counties in Maryland, and Fairfax, Arlington and Prince William Counties in Virginia.
- North of this area, the narrowing of the Potomac River, bridges, and the Brookmont Dam limits the Marina Market Area.
- RPCA – Current non-resident leaseholders in the City's marina reside in Fairfax and Prince William Counties. Largest percentage of transients are from Prince William County.



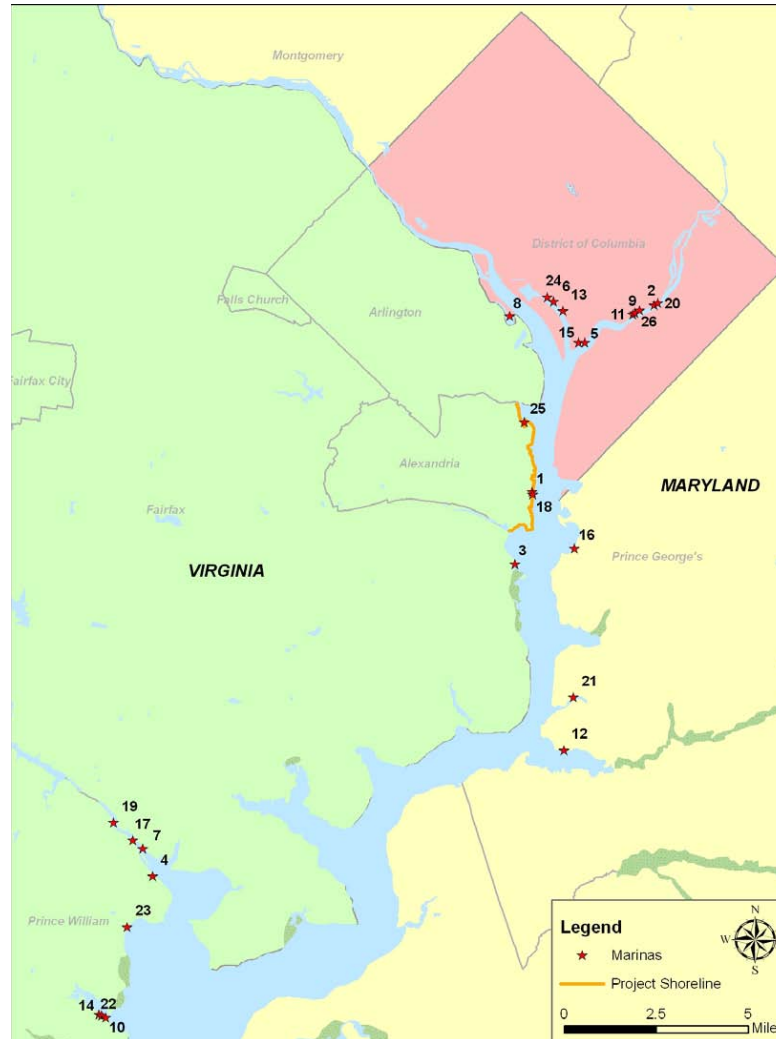
Marina Market Area

- M&N – along with distance, a willingness to travel is dependent on a variety of factors:
 - Recreational interests
 - Access
 - Availability of slips
 - Nearby amenities
 - Price of fuel and slips
 - Customer service

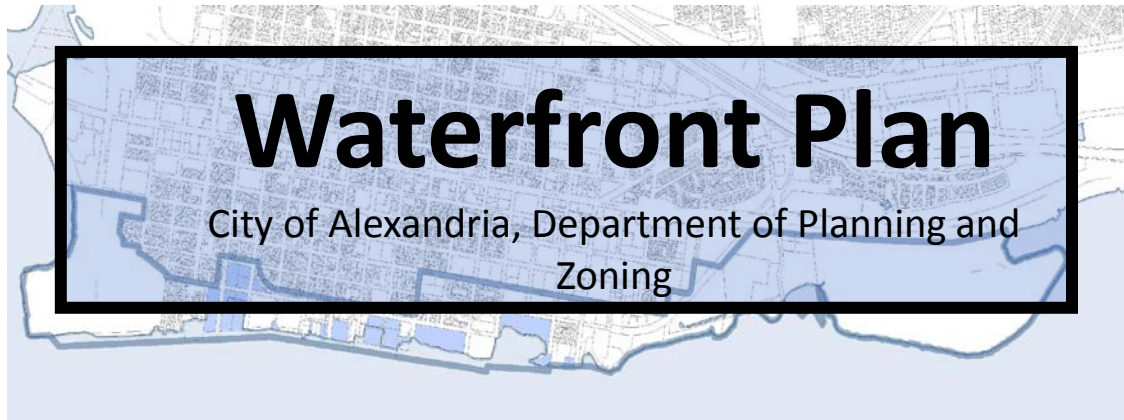


Market

- 26 Marinas
- Residential Communities to Members-only Yacht Club marinas
- 3,759 slips
- 2,500 less than 40 ft
- Powerboats & Small sailboats
- Bridge Height Restrictions
1% capacity for 80ft+



| Amenity | Marinas |
|------------------|----------------|
| Potable Water | 26 |
| Electric | 25 |
| Pump Out | 23 |
| Gas | 12 |
| Ice Machine | 12 |
| Showers | 12 |
| Restaurant | 9 |
| Diesel | 7 |
| TV/Cable | 6 |
| Bar | 5 |
| Laundry | 5 |
| Internet | 4 |
| Shopping | 2 |
| Swimming Pool | 2 |
| Hotel | 1 |
| Fire Suppression | |



Projected Market

- Underserved Existing Population
 - Evidenced by Waiting Lists (not enough slips for local boaters)
 - Boats per Capita – DC is 1 boat per 125 people
 - Boats per Capita – VA/MD is 1 boat for every 30 people
- Population Growth
 - Historic trends indicate an overall regional population growth through 2030
 - 12% overall regional market growth through 2030
 - Regional income growth



Projected Market

- Upland Development
 - Residential
 - Commercial
 - Retail
 - Tourism related
- Commercial/Charter Industry – tourists and access to recreational activities
 - Water taxis
 - Charters



M&N Key Findings

- Long-term marina market is expected to grow.
- Expansion of marina to a total of 150-200 is projected to satisfy recreational demand as well as the commercial and short term transient demand (with amenities/improvements).
- Commercial slip and mooring requirements need to be assessed and prioritized in association with any recreational boating needs.



M&N Key Findings

- Recreational slip sizes should be centered on 40 ft boat length with slip layout and fairway width designed to allow flexibility (NMMA data shows 35-50 ft boat class is growing faster than smaller boat segments).
- Jurisdictional constraints and environmental permitting is a key consideration in expansion.
- Engineering assessment of existing marina facilities and operations is recommended for future stage of planning process.
- Financial analysis required as part of planning process.



City of Alexandria
Planning and Zoning Department
Waterfront Planning Process
<http://www.alexandriava.gov/Waterfront>
703.746.4666