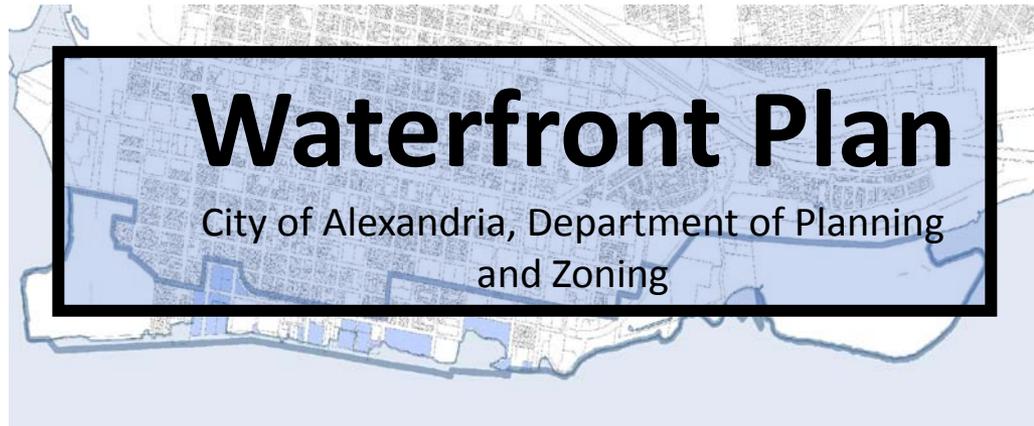


Moffatt and Nichol
Marina Market Assessment Data



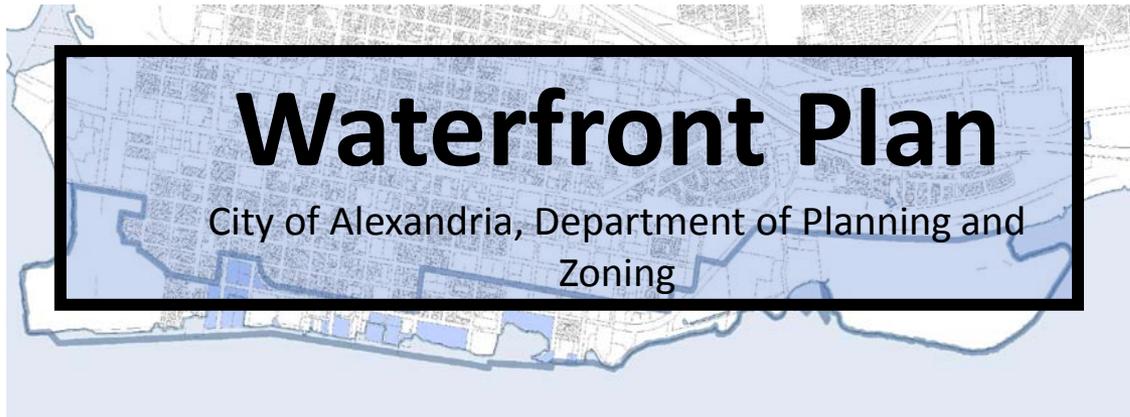
- **Moffatt and Nichol**

- 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

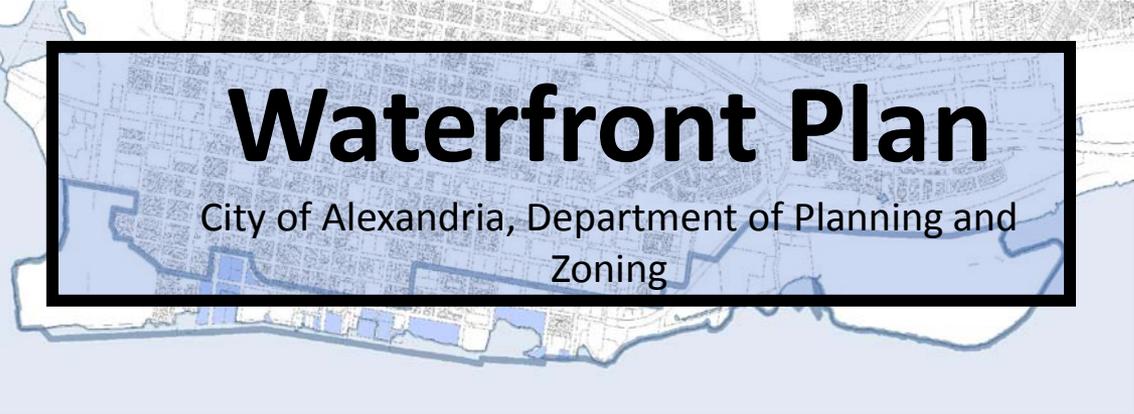
- Background – City of Alexandria Marina
- Marina Market Area
- Existing Marinas within Marina Market Area
- Marina Size, Amenities and Lease Rates (2009 data)
- Projected Market
- Findings based on Projected Market



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

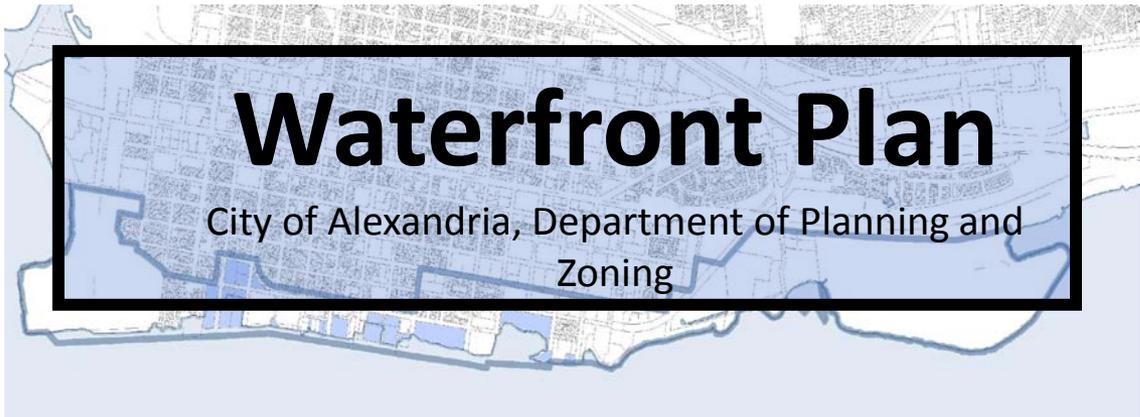


Waterfront Plan

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

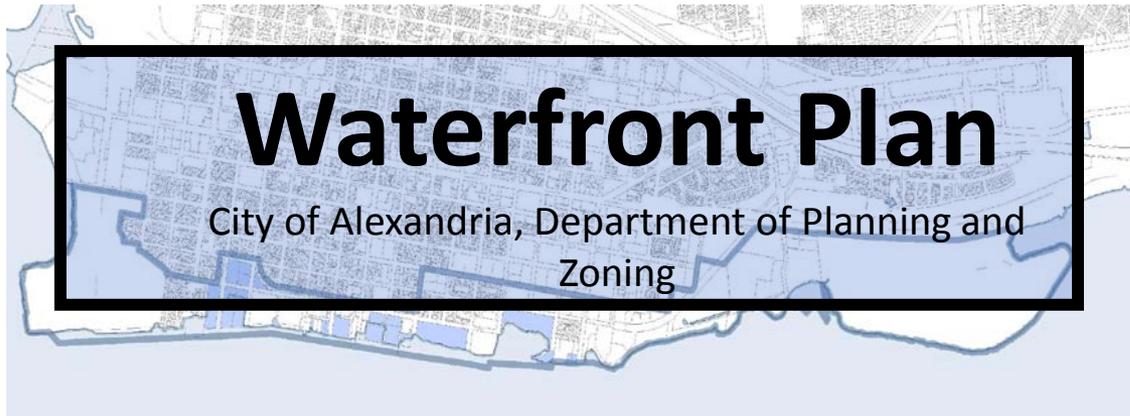
Source: RPCA

•**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.



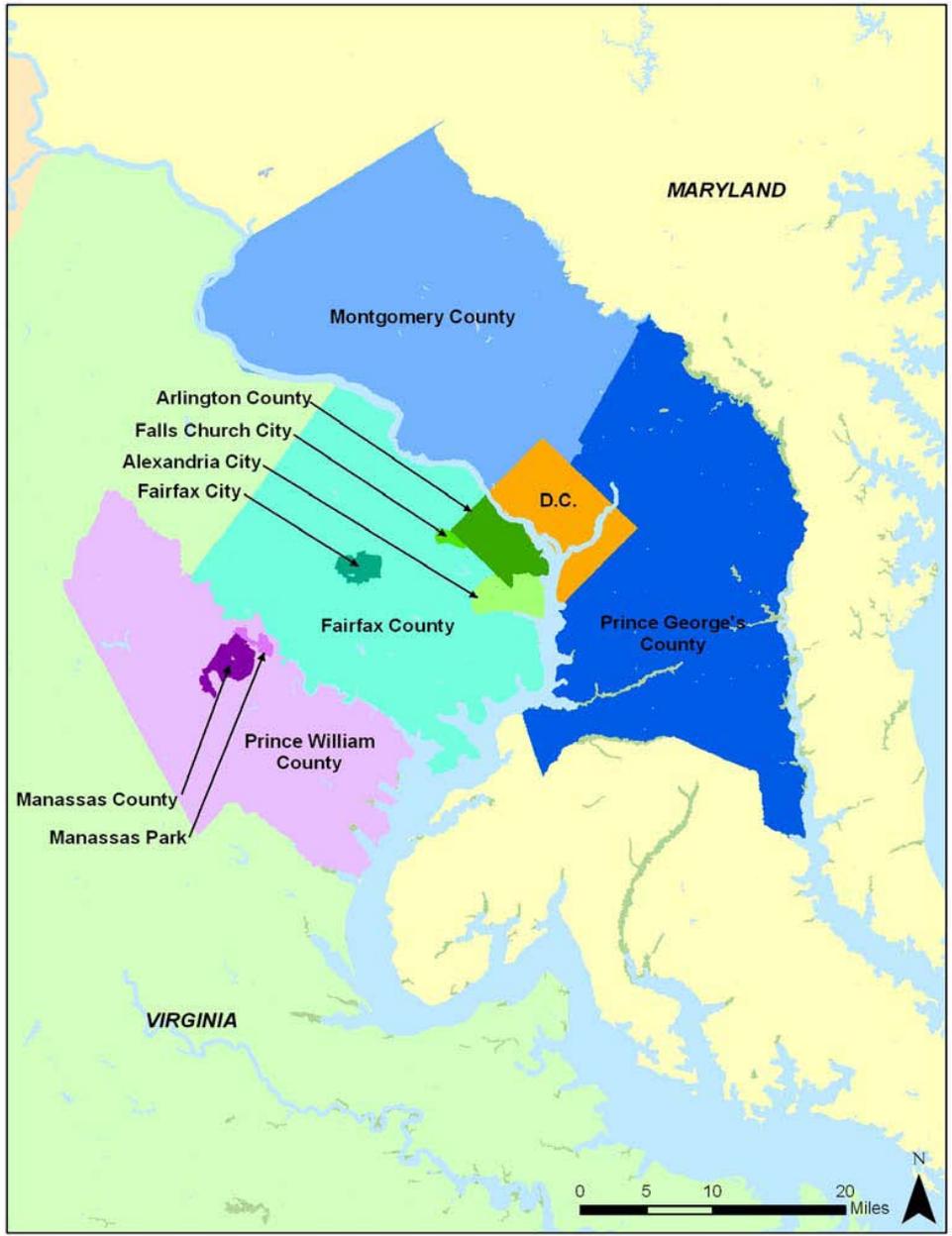
City's Market Area

- 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.



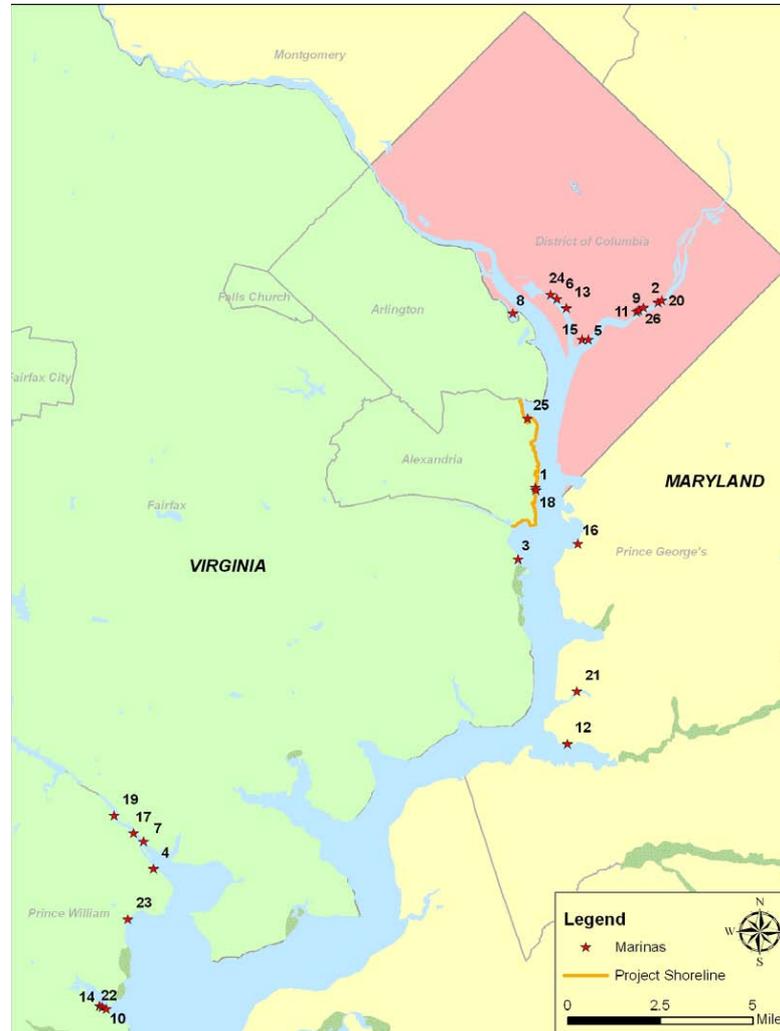
Marina Market Area

- 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

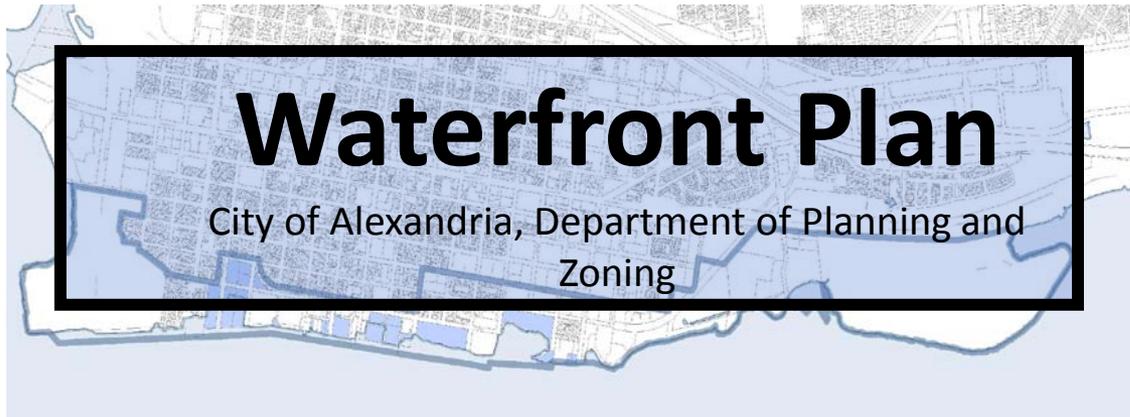


Market

- 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



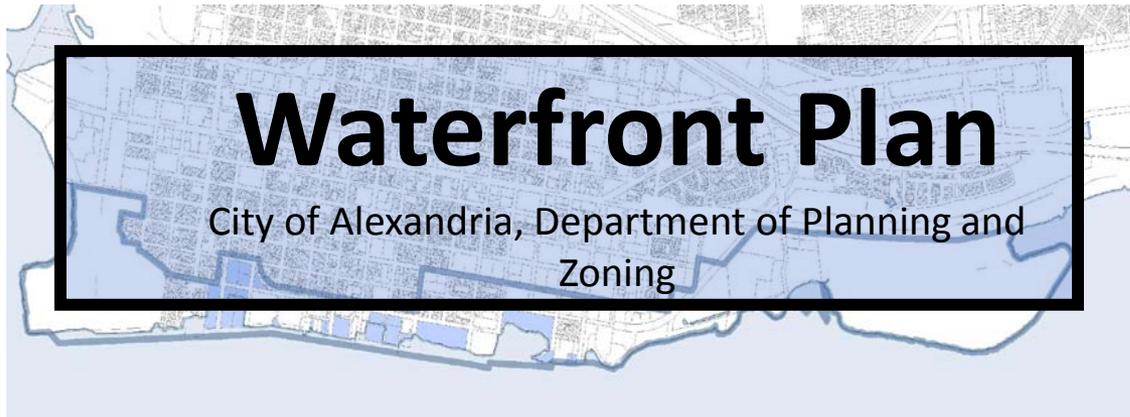
Projected Market

- 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