Public Charrette / June 27th, 2009 / 9:30am

Alan Harwood / EDAW | AECOM
Tom Moriarity / ERA | AECOM
Ryan Bouna / EDAW | AECOM
Nathan Imm / EDAW | AECOM
Craig Perl / T&ES City of Alexandria
Peter Elkan / Moffatt & Nichol
Doug Sarno / Perspectives Group
<table>
<thead>
<tr>
<th>Time</th>
<th>Event Description</th>
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<tbody>
<tr>
<td>9:00</td>
<td>Doors Open (Open House)</td>
</tr>
<tr>
<td>9:30</td>
<td>Welcome / Introductions</td>
</tr>
<tr>
<td>9:40</td>
<td>Waterfront Goals (Basis and Inspiration)</td>
</tr>
<tr>
<td>10:15</td>
<td>Summary of Findings / Issues / Opportunities</td>
</tr>
<tr>
<td>11:40</td>
<td>Public Engagement Exercise</td>
</tr>
<tr>
<td>12:00</td>
<td>Lunch Break</td>
</tr>
<tr>
<td>12:30</td>
<td>Key Challenge Questions to be Addressed</td>
</tr>
<tr>
<td>12:40</td>
<td>Vision Break-Out Groups (8)</td>
</tr>
<tr>
<td>2:20</td>
<td>Reports from Break-Out Groups</td>
</tr>
<tr>
<td>2:50</td>
<td>Next Steps</td>
</tr>
<tr>
<td>3:00</td>
<td>Adjournment</td>
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</tbody>
</table>
Context, History and Land Use

Alan Harwood / EDAW | AECOM
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Doug Sarno / Perspectives Group
Increasing Competition
1. Washington Harbor
2. Southwest Waterfront
3. The Yards
4. Poplar Point
5. Hill East
6. National Harbor

Changing Circumstances

New Thinking
Context, History & Land Use / Project Setting

Increasing Competition
1. Washington Harbor
2. Southwest Waterfront
3. The Yards
4. Poplar Point
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- Increasing Competition
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- Changing Circumstances

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Changing Circumstances

New Thinking
Context, History & Land Use / Study Area

- Address the future of the waterfront (20+ years)
- Waterfront extends from Jones Point to Daingerfield Island
- Water is the basis for the waterfront
Expand the study area
Focus on the core
History is foundation for looking forward

Pt. Lumley to West’s Point (Duke St. to Oronoco St.)

1749 – Town founded and consisted of 21 blocks

City grew into the Potomac River by ‘banking out’
History is foundation for looking forward

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Pt. Lumley to West’s Point (Duke St. to Oronoco St.)
1749 – Town founded and consisted of 21 blocks
City grew into the Potomac River by ‘banking out’
1838 – Development extended to West St. and Hunting Creek (235 blocks)
1846 – Virginia retroceded Alexandria from the District of Columbia
1860’s – Population of 12,000 was displaced and occupied by the Union Army
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1900’s – Alexandria reached Shuter’s Hill
1930’s – Historic preservation began with Mount Vernon and Gadsby’s Tavern
1946 – 3rd Historic district in the nation
Today there are more than 200 historic buildings
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Today there are more than 200 historic buildings
Context, History & Land Use / Waterfront Destinations

Legend:
- Open Space Elements
- Waterfront Focus Areas

Scale: 1:2000

0 1000 2000 4000 Feet 

Fairfax County
Hunting Creek
Potomac River

Jones Point Park
Windmill Hill Park
Founder's Park
Oronoco Bay Park
Daingerfield Island

Robinson Terminal South
Robinson Terminal North
Torpedo Factory
Mirant Energy
Context, History & Land Use / Waterfront Destinations

Legend:
- Open Space Elements
- Waterfront Focus Areas

Scale: 1:2000

Feet

NORTH
Context, History & Land Use / Waterfront Destinations
Context, History & Land Use / Zoning

- Residential Neighborhoods
- Retail Spine
- Mixed-Use Areas
Implemented

- Ford Plant to Ford’s Landing
- VEPCO Property to Harbourside
- Norton Property to Rivergate
Context, History & Land Use / Land Use Agreements

Remaining

- Robinson Terminals
- Old Dominion Boat Club

Design, Planning and Environments Worldwide
Context, History & Land Use / Land Use by Building

Categories
- Residential
- Retail / Restaurant
- Office / Institutional
- Industrial / Utilities

Incompatible uses / Obstructions
- Mirant Power Plant
- Robinson Terminal North
- Robinson Terminal South
- Food Court
- Other
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Economic Analysis

Alan Harwood  /  EDAW | AECOM
Tom Moriarity  /  ERA | AECOM
Ryan Bouma  /  EDAW | AECOM
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Craig Perl  /  T&ES City of Alexandria
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Market Area Residents

- Based on TAZ (Traffic Analysis Zone) Data
- TAZ is basis for 2030 projections by Metropolitan Washington Council of Governments
- Basis for ERA/AECOM market analysis
- Four areas of residential market demand:
  - North Primary
  - North Secondary
  - South Primary
  - South Secondary
## Demographics

<table>
<thead>
<tr>
<th></th>
<th>2010 Population</th>
<th>2010 Households</th>
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</thead>
<tbody>
<tr>
<td>Market Area</td>
<td>13,538</td>
<td>7,604</td>
</tr>
<tr>
<td>South Primary</td>
<td>3,618</td>
<td>2,049</td>
</tr>
<tr>
<td>South Secondary</td>
<td>2,054</td>
<td>1,250</td>
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<tr>
<td>North Primary</td>
<td>4,173</td>
<td>2,581</td>
</tr>
<tr>
<td>North Secondary</td>
<td>3,693</td>
<td>1,724</td>
</tr>
<tr>
<td>City of Alexandria</td>
<td>137,947</td>
<td>65,537</td>
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<tr>
<td>Arlington County</td>
<td>203,828</td>
<td>90,864</td>
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<tr>
<td>Fairfax County</td>
<td>1,035,674</td>
<td>376,332</td>
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<tr>
<td>Washington, DC</td>
<td>589,366</td>
<td>260,214</td>
</tr>
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</table>
Market Area Demographics

- Owner to renter split roughly equal

**Median Home Value**

- South Primary: $919,000
- Overall Market Area: $664,000
- City of Alexandria: $377,500

**Median Household Income, 2008**

- Owner: 54%
- Renter: 46%

- Median Home Value:
  - South Primary: $919,000
  - Overall Market Area: $664,000
  - City of Alexandria: $377,500

- Median Income:
  - $200,000
  - $300,000
  - $400,000
  - $500,000
  - $600,000
  - $700,000
  - $800,000
  - $900,000
  - $1,000,000
Market Area Demographics

Market Area HH Income

- 50 percent of market area households earn more than $100,000 annually compared to 36 percent in the entire City of Alexandria.

Market Area Spending Power

- 67 percent of market area households are between the ages of 25 and 65; age cohorts with the most spending power.
Market Area Employees

- Employment demand also includes Metro/Upper King St. TAZ
  - Made possible by King St. Trolley
- Total employment in 2010 equals 36,300
- North Employment about 45 percent
- South employment about 19 percent
- Upper King/Metro about 35 percent
Economics- Retail

- Estimated 940,100 square feet of existing retail space (King St./Washington Street from Metro to waterfront)
- CoStar reports 4.1% vacancy rate (5 percent is typical target)
- Current rents average $37.71, triple net
- Five-year average net absorption of (31,362) square feet
- According to the King Street Retail Strategy (2005) 77% of retail inventory is located in ground-floor space
- Retail sales between 1999 and 2002 remained relatively steady at approximately $120 million annually
Economics - Office

- 3.6 million square feet of office space along King Street/Washington Street from Metro to waterfront
- CoStar reports 7.8% vacancy rate
- Current average rental rate of $31.57, full service
- Five-year average net absorption of 5,100 square feet
Visitors

- Estimated 3.3 million annual visitors to Alexandria (source: Alexandria Convention and Visitors Association)
- Visitor categories include:
  - Business visitors,
  - Leisure visitors,
  - Torpedo Factory and other attractions (Mt. Vernon, George Washington Memorial etc),
  - Mount Vernon Trail recreation and commuter biking,
  - Area inflow for events, dining etc.,
  - Dinner cruise passengers,
  - Recreation boaters,
  - Motor coach tours and
  - School groups

- Percentage of Total Visitor Spending
  - Recreation
  - Shopping
  - Food & Beverage
  - Lodging
  - Auto/Gas
  - Airline
  - Other

- Visitors
  - Leisure
  - Business
  - Other
The old town Alexandria area has 2,466 rooms in 12 properties.

Average city-wide occupancy in (May 2009) equals 76%.

Average Daily Rate (ADR) equals $114.98 (May 2009) vs. $126.28 (May 2008).
Marina

- Approx. 1,500 slips regionally
- 113 slips locally (Alexandria City 60, ODBC 53)
- Fewer than 50 vacant slips
- 90% average occupancy
Preliminary Market Potential

ERA/AECOM estimates 64,000 square feet of supportable retail space along the Alexandria Waterfront

- Resident spending supports 34,000 square feet (53 percent)
- Employee spending supports 14,000 square feet (22 percent)
- Visitor spending supports 15,600 square feet (25 percent)

Estimates include existing waterfront retail space to be re-programmed or redeveloped

<table>
<thead>
<tr>
<th>Retail Category</th>
<th>Supportable Square Feet</th>
</tr>
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<tbody>
<tr>
<td>Residential &amp; Inflow</td>
<td></td>
</tr>
<tr>
<td>Apparel &amp; Apparel Services</td>
<td>6,295</td>
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<tr>
<td>Entertainment &amp; Recreation</td>
<td>12,299</td>
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<tr>
<td>Personal Care</td>
<td>841</td>
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<tr>
<td>Household Furnishings and Equipment</td>
<td>3,629</td>
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<tr>
<td>Food and Drink Away From Home</td>
<td>10,896</td>
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<tr>
<td><strong>Subtotal Supportable Demand</strong></td>
<td><strong>33,959</strong></td>
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<tr>
<td><strong>Employee</strong></td>
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<tr>
<td>Apparel &amp; Apparel Services</td>
<td>1,729</td>
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<td>Entertainment &amp; Recreation</td>
<td>2,506</td>
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<tr>
<td>Personal Care</td>
<td>2,147</td>
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<tr>
<td>Household Furnishings and Equipment</td>
<td>577</td>
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<tr>
<td>Food and Drink Away From Home</td>
<td>7,455</td>
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<tr>
<td><strong>Subtotal Supportable Demand</strong></td>
<td><strong>14,414</strong></td>
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<tr>
<td><strong>Visitors</strong></td>
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<tr>
<td>Apparel &amp; Apparel Services</td>
<td>3,294</td>
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<tr>
<td>Entertainment &amp; Recreation</td>
<td>3,297</td>
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<tr>
<td>Personal Care</td>
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<tr>
<td>Household Furnishings and Equipment</td>
<td>766</td>
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<tr>
<td>Food and Drink Away From Home</td>
<td>5,979</td>
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<tr>
<td><strong>Subtotal Supportable Demand</strong></td>
<td><strong>15,628</strong></td>
</tr>
<tr>
<td><strong>Total Demand</strong></td>
<td><strong>64,001</strong></td>
</tr>
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</table>

Source: ERA AECOM, 2009
Problems / Issues

- Census data (2010 Census)
- Hotel information pending
- Marina permitting for water-based uses
- Use transitions (Robinson Terminal, Mirant Power Plant)
- Flood plain and flooding conditions
- Parking
Funding

Potential funding strategies include:

- Form a public/private Alexandria Waterfront Foundation for bequests, memorial gifts, and special project funding
- Establish a seasonal kiosk/cart concessions program for public spaces (permitted uses and locations, specific design, operations and health standards), etc.
- Create a water/view events rental venue for exhibits, art presentations, weddings, receptions and parties
- Explore potential to bond public marina expansion backed by incremental revenues
- Create a sponsorship program to fund capital improvement projects and operating costs
- Develop a fee based programmable public/parking open space for outdoor events, community ceremonies, and public markets etc.
Opportunity

Potential
- Views add premiums for residential, office and retail uses
- Redevelopment affected by high land values

Old Town character affects scale and density

Approach

Suggestions