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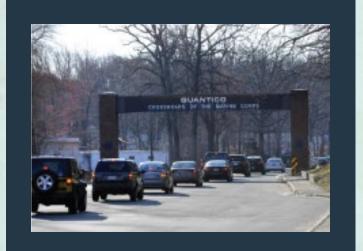
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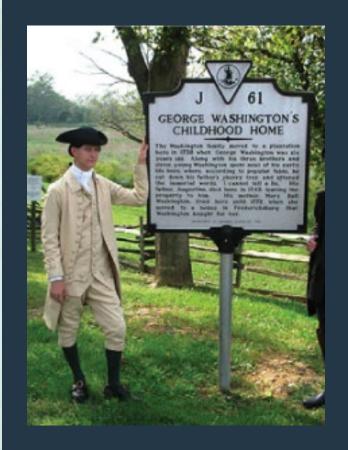
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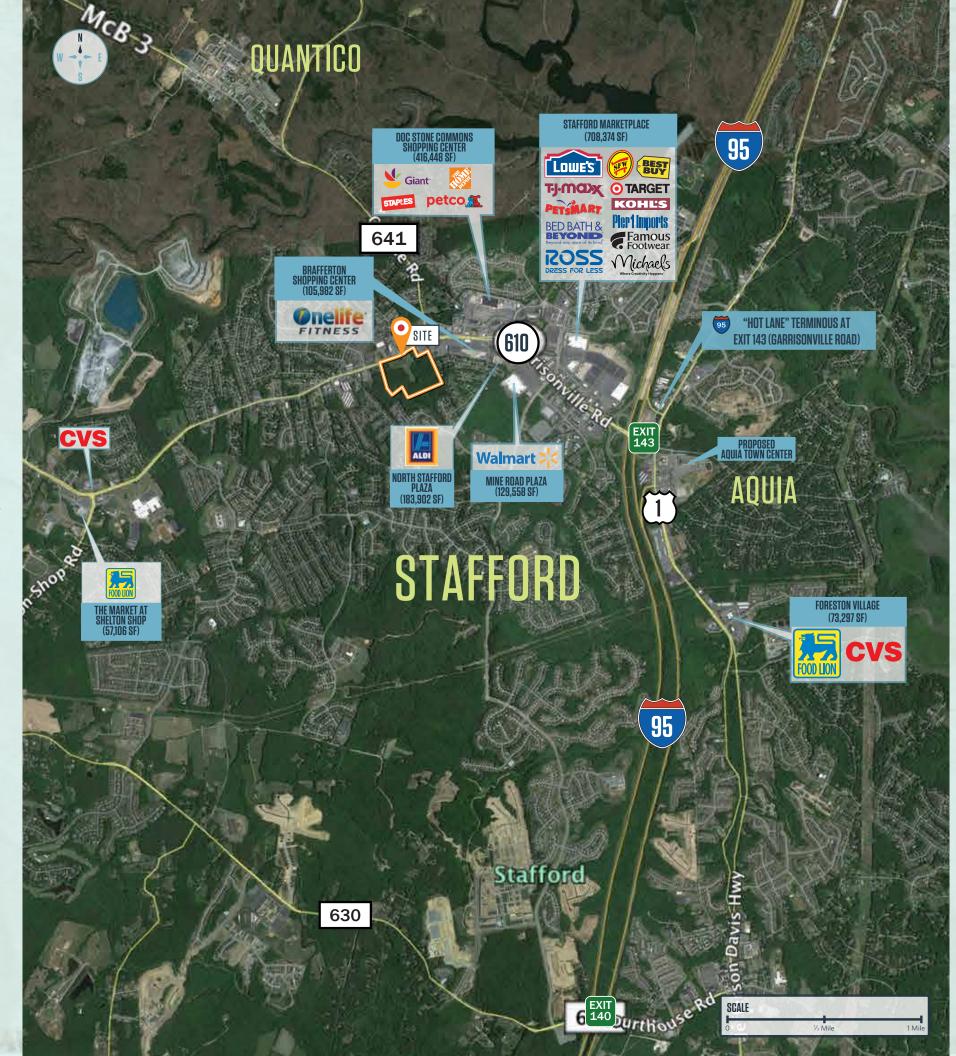
## MARKET FACTS AND AERIAL

#### WHERE IN THE WORLD IS STAFFORD, VA?

- 25 Miles South of the Washington DC Beltway.
- Southern anchor of the Washington Metro Area with a a gross regional product of \$425B.
- Unique travel patterns due to North/South Infrastructure (Traditional concentric circles do not apply in Stafford).
- I-95 "Hot Lane" terminous at Exit 143 (Garrisonville Road).

#### WHY OPEN IN STAFFORD, VA?

- Stafford County consistently ranks in the top 20 wealthiest localities in the USA with a median household income of \$100,226 (ESRI), and is currently the 7th wealthiest county in Virginia, and the 20th wealthiest county in the USA (U.S. Census Bureau).
- Population Growth:
  - Annual growth rate roughly 2% (out-paces region) population 147,000+ millennials = 13%.
- At-Place Employment:
  - Leads Virginia in growth growing 2.6% annually ('09-'14).
- Interstate Daily Travelers:
  - I-95 has over 137,000 cars per day.
  - Extraordinary interstate access (5 exits w/60,000 ADT).
- · Highly Educated:
  - 60% of population has bachelor's degree or higher (or military equivalent).
- Home Ownership:
  - 78.3% median housing value = \$341,000.
  - Thousands of residential units in the pipeline.
- Stafford is the home to Quantico Marine Corp Base (QMCB) which as of 2018:
  - Employs more than 25,000 civilian and military personnel.
  - On site personnel grows 3.1%/year and civilian personnel grows at a 1.6% rate.
  - Has more than 7400 active duty military.
  - Has 1562 permanent housing units (1137 family housing units, 335 for officers and 782 for enlisted units).
  - Has a 120 room inn on site and 115 temporary duty units.



## HOUSING AND DEMOGRAPHICS

### DEMOGRAPHICS (2020)

POPULATION

1 MILE 3 MILE 5 MILE

9,888 84,312\*

**MEDIAN HH INCOME** 

\$93,053 \$107,297\* \$111,972\*

DAYTIME **POPULATION** 



\*INCLUDES QMCB POPULATION NOT OTHERWISE INCLUDED IN ESRI DEMOGRAPHICS.



#### TRAFFIC COUNTS (2019)

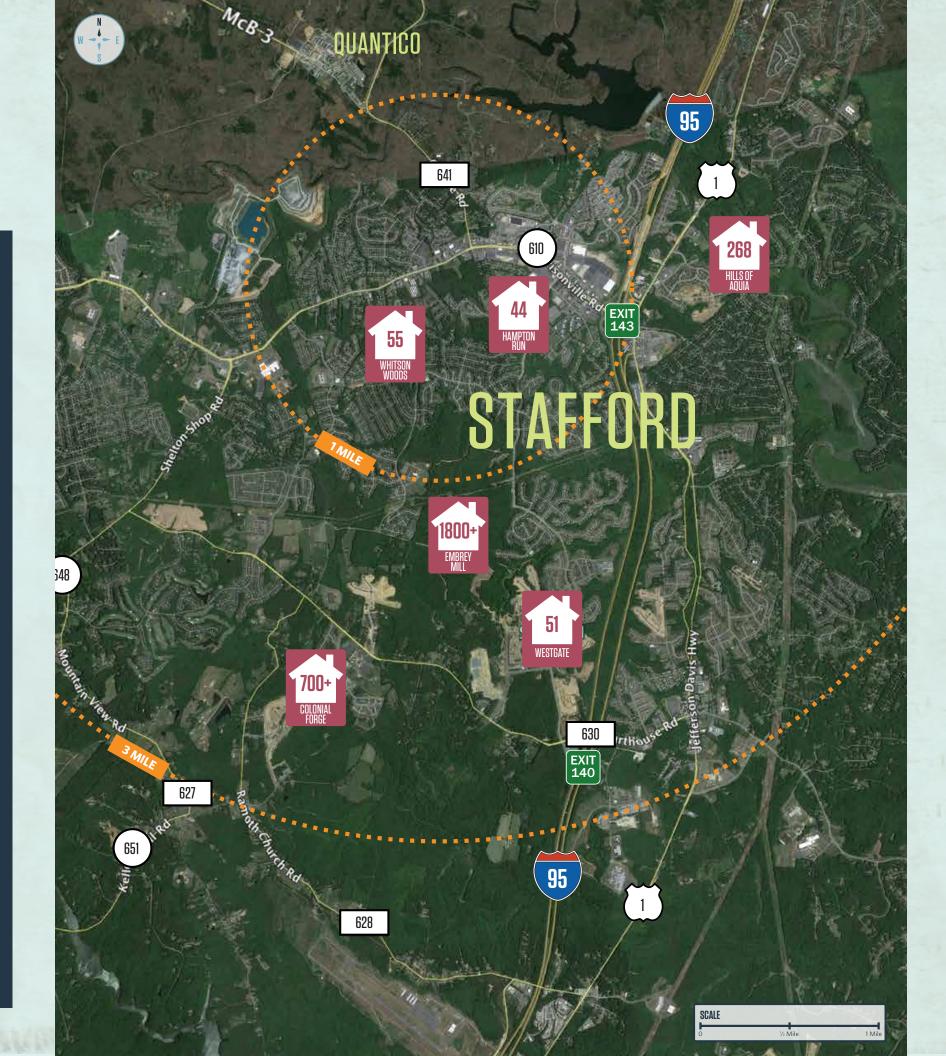


I-95 140,000 ADT

**GARRISONVILLE ROAD (ROUTE 3610)** 

**TRAVIS LANE TO ROUTE 95** 77,000 ADT

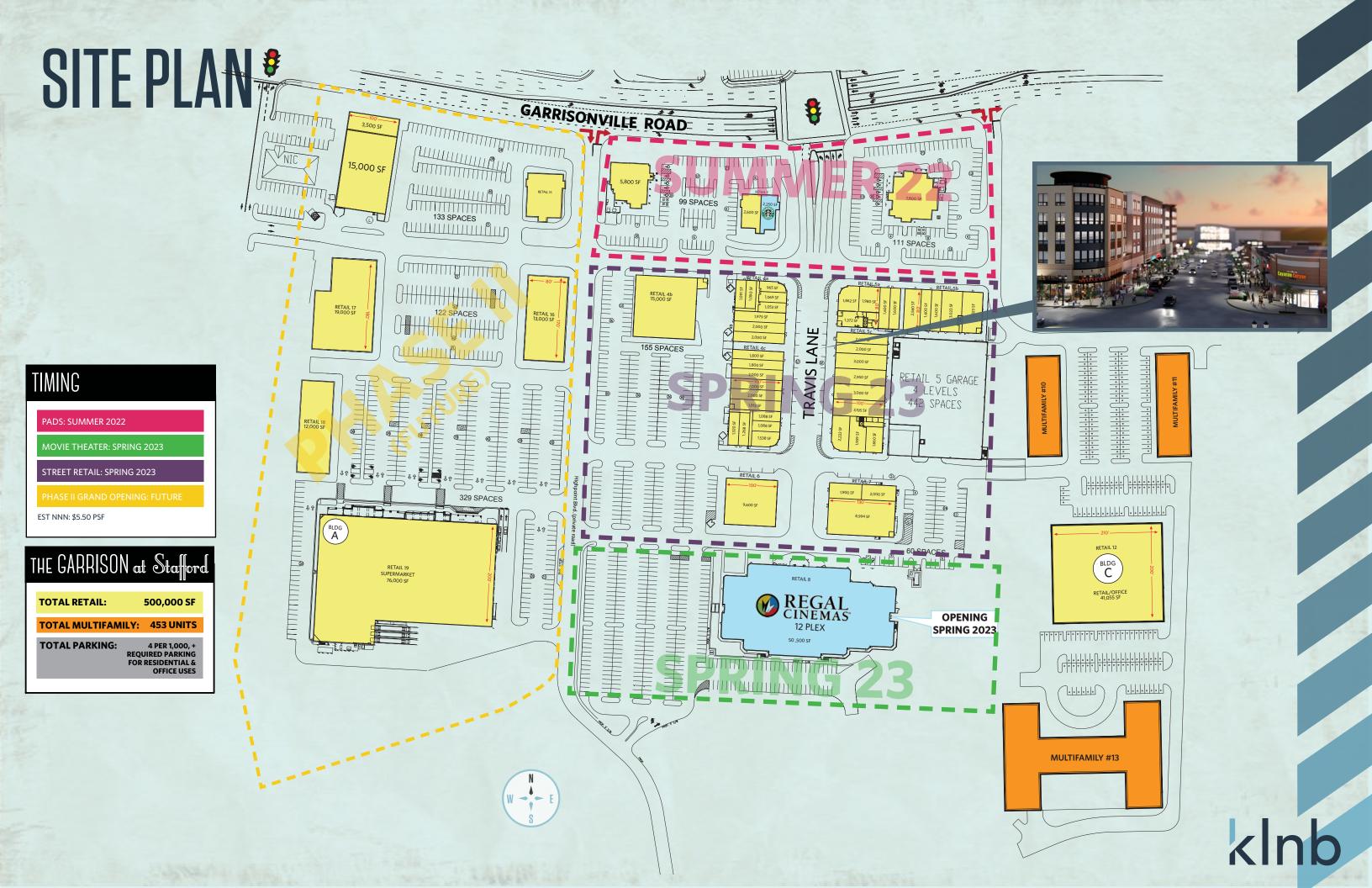
KINGSLAND DRIVE TO TRAVIS LANE 37,000 ADT



# AERIAL EMBEDDED SITE PLAN









Looking south down Travis Lane (newly extended)















Building 4



Building 4



Building 7



Building 6















**Building 5 West Elevation** 



**Building 5 North Elevation** 

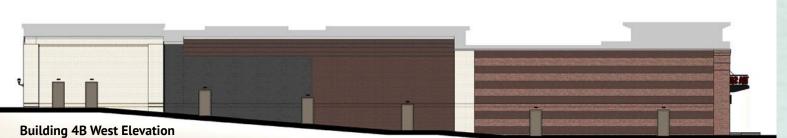




**Building 4B East Elevation** 



**Building 4A West Elevation** 

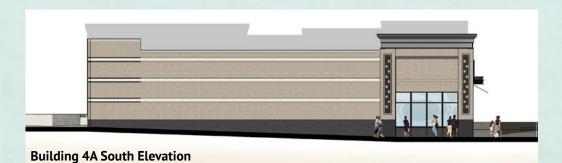


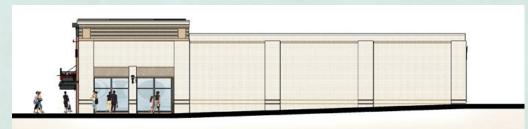


**Building 4A North Elevation** 



**Building 4B South Elevation** 





**Building 4B North Elevation** 

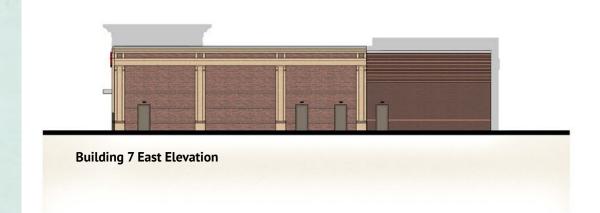
















## STAFFORD MARKET RETAIL GAP (LEAKAGE)



**Summary Demographics** 

2020 Per Capita Income

2020 Population

2020 Households

#### Retail MarketPlace Profile

425 Garrisonville Rd, Stafford, Virginia, 22554 2 Prepared by KLNBretail 425 Garrisonville Rd, Stafford, Virginia, 22554 Latitude: 38.47493 Ring: 5 mile radius Longitude: -77.42824

84,312 26,202 2020 Median Disposable Income \$85,808 \$44,764

	NAICS	Demand	Supply	Retail Gap	Leakage/Surplus	Number of
2017 Industry Summary		(Retail Potential)	(Retail Sales)		Factor	Businesses
Total Retail Trade and Food & Drink	44-45,722	\$1,376,180,500	\$566,302,004	\$809,878,496	41.7	306
Total Retail Trade	44-45	\$1,238,774,184	\$491,823,790	\$746,950,394	43.2	192
Total Food & Drink	722	\$137,406,316	\$74,478,214	\$62,928,102	29.7	114
	NAICS	Demand	Supply	Retail Gap	Leakage/Surplus	Number of
2017 Industry Group		(Retail Potential)	(Retail Sales)		Factor	Businesses
Motor Vehicle & Parts Dealers	441	\$263,940,049	\$170,663,985	\$93,276,064	21.5	36
Automobile Dealers	4411	\$215,866,475	\$145,299,981	\$70,566,494	19.5	22
Other Motor Vehicle Dealers	4412	\$27,167,806	\$17,507,309	\$9,660,497	21.6	6
Auto Parts, Accessories & Tire Stores	4413	\$20,905,768	\$7,856,695	\$13,049,073	45.4	8
Furniture & Home Furnishings Stores	442	\$48,822,079	\$10,280,773	\$38,541,306	65.2	12
Furniture Stores	4421	\$27,117,167	\$3,475,415	\$23,641,752	77.3	4
Home Furnishings Stores	4422	\$21,704,913	\$6,805,358	\$14,899,555	52.3	8
Electronics & Appliance Stores	443	\$41,175,504	\$23,673,541	\$17,501,963	27.0	11
Bldg Materials, Garden Equip. & Supply Stores	444	\$86,057,145	\$41,468,703	\$44,588,442	35.0	15
Bldg Material & Supplies Dealers	4441	\$80,030,961	\$36,158,851	\$43,872,110	37.8	10
Lawn & Garden Equip & Supply Stores	4442	\$6,026,183	\$5,309,853	\$716,330	6.3	4
Food & Beverage Stores	445	\$215,205,837	\$57,512,562	\$157,693,275	57.8	27
Grocery Stores	4451	\$198,950,544	\$54,861,535	\$144,089,009	56.8	22
Specialty Food Stores	4452	\$6,257,523	\$1,925,858	\$4,331,665	52.9	4
Beer, Wine & Liquor Stores	4453	\$9,997,770	\$725,169	\$9,272,601	86.5	1
Health & Personal Care Stores	446,4461	\$71,632,636	\$24,503,715	\$47,128,921	49.0	10
Gasoline Stations	447,4471	\$119,762,975	\$27,844,777	\$91,918,198	62.3	g
Clothing & Clothing Accessories Stores	448	\$64,504,723	\$7,649,001	\$56,855,722	78.8	14
Clothing Stores	4481	\$43,086,387	\$4,196,837	\$38,889,550	82.2	g
Shoe Stores	4482	\$9,300,087	\$2,327,429	\$6,972,658	60.0	3
Jewelry, Luggage & Leather Goods Stores	4483	\$12,118,249	\$1,124,735	\$10,993,514	83.0	2
Sporting Goods, Hobby, Book & Music Stores	451	\$34,840,208	\$9,773,019	\$25,067,189	56.2	11
Sporting Goods/Hobby/Musical Instr Stores	4511	\$29,597,239	\$9,546,571	\$20,050,668	51.2	10
Book, Periodical & Music Stores	4512	\$5,242,969	\$226,448	\$5,016,521	91.7	1
General Merchandise Stores	452	\$224,582,857	\$94,163,041	\$130,419,816	40.9	9
Department Stores Excluding Leased Depts.	4521	\$157,162,845	\$88,319,000	\$68,843,845	28.0	5
Other General Merchandise Stores	4529	\$67,420,012	\$5,844,041	\$61,575,971	84.0	4
Miscellaneous Store Retailers	453	\$44,970,795	\$18,488,302	\$26,482,493	41.7	32
Florists	4531	\$2,303,516	\$916,869	\$1,386,647	43.1	4
Office Supplies, Stationery & Gift Stores	4532	\$11,565,543	\$6,187,892	\$5,377,651	30.3	11
Used Merchandise Stores	4533	\$5,716,810	\$888,432	\$4,828,378	73.1	2
Other Miscellaneous Store Retailers	4539	\$25,384,927	\$10,495,109	\$14,889,818	41.5	15
Nonstore Retailers	454	\$23,279,376	\$5,802,371	\$17,477,005	60.1	5
Electronic Shopping & Mail-Order Houses	4541	\$15,614,385	\$1,005,474	\$14,608,911	87.9	2
Vending Machine Operators	4542	\$1,068,465	\$0	\$1,068,465	100.0	C
Direct Selling Establishments	4543	\$6,596,527	\$4,796,897	\$1,799,630	15.8	3
Food Services & Drinking Places	722	\$137,406,316	\$74,478,214	\$62,928,102	29.7	114
Special Food Services	7223	\$1,985,317	\$712,095	\$1,273,222	47.2	4
Drinking Places - Alcoholic Beverages	7224	\$1,727,663	\$0	\$1,727,663	100.0	C
Restaurants/Other Eating Places	7225	\$133,693,337	\$73,665,610	\$60,027,727	28.9	110

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

http://www.esri.com/library/whitepapers/pdfs/esri-data-retail-marketplace.pdf

Source: Esri and Infogroup. Esri 2020 Updated Demographics. Esri 2017 Retail MarketPlace. @2020 Esri. @2017 Infogroup, Inc. All rights reserved.



**Summary Demographics** 

#### Retail MarketPlace Profile

425 Garrisonville Rd, Stafford, Virginia, 22554 2 425 Garrisonville Rd, Stafford, Virginia, 22554 Ring: 7 mile radius

Longitude: -77.42824

Prepared by KLNBretail

94.753 2020 Population 2020 Households 29,415 2020 Median Disposable Income \$84,840 \$44,214

nain vintage 2017.

	NAICS	Demand	Supply	Retail Gap	Leakage/Surplus	Number of
2017 Industry Summary	44 45 700	(Retail Potential)	(Retail Sales)	+000 554 500	Factor	Businesses
Total Retail Trade and Food & Drink	44-45,722	\$1,523,880,840	\$621,326,252	\$902,554,588	42.1	353
Total Retail Trade	44-45	\$1,371,706,892	\$539,194,617	\$832,512,275	43.6	227
Total Food & Drink	722	\$152,173,948	\$82,131,636	\$70,042,312	29.9	126
2017 To door to Consum	NAICS	Demand	Supply	Retail Gap	Leakage/Surplus	Number of
2017 Industry Group	441	(Retail Potential)	(Retail Sales)	*01.070.027	Factor	Businesses
Motor Vehicle & Parts Dealers	441	\$292,535,770	\$200,655,833	\$91,879,937	18.6	48
Automobile Dealers	4411	\$239,318,261	\$157,961,144	\$81,357,117	20.5	28
Other Motor Vehicle Dealers	4412	\$30,070,094	\$34,442,344	-\$4,372,250	-6.8	10
Auto Parts, Accessories & Tire Stores	4413	\$23,147,415	\$8,252,344	\$14,895,071	47.4	9
Furniture & Home Furnishings Stores	442	\$53,947,396	\$10,353,468	\$43,593,928	67.8	12
Furniture Stores	4421	\$30,009,525	\$3,535,012	\$26,474,513	78.9	4
Home Furnishings Stores	4422	\$23,937,871	\$6,818,456	\$17,119,415	55.7	8
Electronics & Appliance Stores	443	\$45,558,628	\$23,778,689	\$21,779,939	31.4	11
Bldg Materials, Garden Equip. & Supply Stores	444	\$94,861,031	\$46,499,821	\$48,361,210	34.2	18
Bldg Material & Supplies Dealers	4441	\$88,209,552	\$38,712,199	\$49,497,353	39.0	13
Lawn & Garden Equip & Supply Stores	4442	\$6,651,479	\$7,787,621	-\$1,136,142	-7.9	5
Food & Beverage Stores	445	\$238,485,700	\$59,115,479	\$179,370,221	60.3	30
Grocery Stores	4451	\$220,489,574	\$56,067,227	\$164,422,347	59.5	24
Specialty Food Stores	4452	\$6,937,121	\$2,323,083	\$4,614,038	49.8	5
Beer, Wine & Liquor Stores	4453	\$11,059,005	\$725,169	\$10,333,836	87.7	1
Health & Personal Care Stores	446,4461	\$79,217,962	\$25,050,057	\$54,167,905	52.0	13
Gasoline Stations	447,4471	\$132,879,917	\$29,580,224	\$103,299,693	63.6	10
Clothing & Clothing Accessories Stores	448	\$71,404,048	\$8,772,190	\$62,631,858	78.1	16
Clothing Stores	4481	\$47,699,222	\$5,320,026	\$42,379,196	79.9	11
Shoe Stores	4482	\$10,293,475	\$2,327,429	\$7,966,046	63.1	3
Jewelry, Luggage & Leather Goods Stores	4483	\$13,411,350	\$1,124,735	\$12,286,615	84.5	2
Sporting Goods, Hobby, Book & Music Stores	451	\$38,559,043	\$10,106,354	\$28,452,689	58.5	13
Sporting Goods/Hobby/Musical Instr Stores	4511	\$32,739,093	\$9,879,906	\$22,859,187	53.6	12
Book, Periodical & Music Stores	4512	\$5,819,950	\$226,448	\$5,593,502	92.5	1
General Merchandise Stores	452	\$248,691,849	\$94,455,950	\$154,235,899	44.9	11
Department Stores Excluding Leased Depts.	4521	\$173,983,886	\$88,319,000	\$85,664,886	32.7	5
Other General Merchandise Stores	4529	\$74,707,963	\$6,136,950	\$68,571,013	84.8	6
Miscellaneous Store Retailers	453	\$49,744,484	\$23,851,789	\$25,892,695	35.2	38
Florists	4531	\$2,540,350	\$916,869	\$1,623,481	47.0	4
Office Supplies, Stationery & Gift Stores	4532	\$12,793,015	\$6,409,673	\$6,383,342	33.2	12
Used Merchandise Stores	4533	\$6,322,708	\$1,678,149	\$4,644,559	58.1	3
Other Miscellaneous Store Retailers	4539	\$28,088,411	\$14,847,098	\$13,241,313	30.8	19
Nonstore Retailers	454	\$25,821,063	\$6,974,764	\$18,846,299	57.5	7
Electronic Shopping & Mail-Order Houses	4541	\$17,302,022	\$1,194,499	\$16,107,523	87.1	2
Vending Machine Operators	4542	\$1,184,547	\$395,309	\$789,238	50.0	1
Direct Selling Establishments	4543	\$7,334,493	\$5,384,955	\$1,949,538	15.3	4
Food Services & Drinking Places	722	\$152,173,948	\$82,131,636	\$70,042,312	29.9	126
Special Food Services	7223	\$2,198,453	\$781,847	\$1,416,606	47.5	4
Drinking Places - Alcoholic Beverages	7224	\$1,913,835	\$280,873	\$1,632,962	74.4	1
Restaurants/Other Eating Places	7225	\$148,061,660	\$81,068,916	\$66,992,744	29.2	121

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

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February 04, 2021

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