

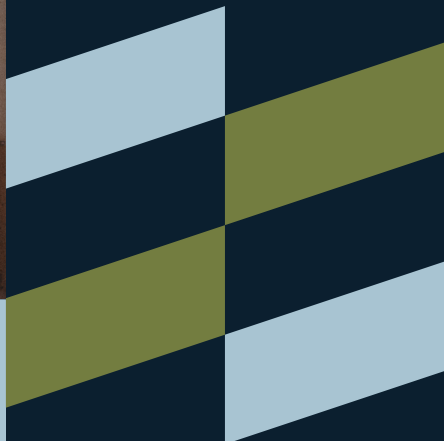


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OCTOBER 2023



# COMMERCIAL PROFILES

# BAILEY'S

# CROSSROADS

PRESENTED BY \_\_\_\_\_



# OUR PURPOSE

Commercial Profiles provide the community and local stakeholders with data-driven insights into Fairfax County's commercial districts. The profiles provide information on how the commercial area is performing and who is being served by the commercial activity.



Photo by Placeholder

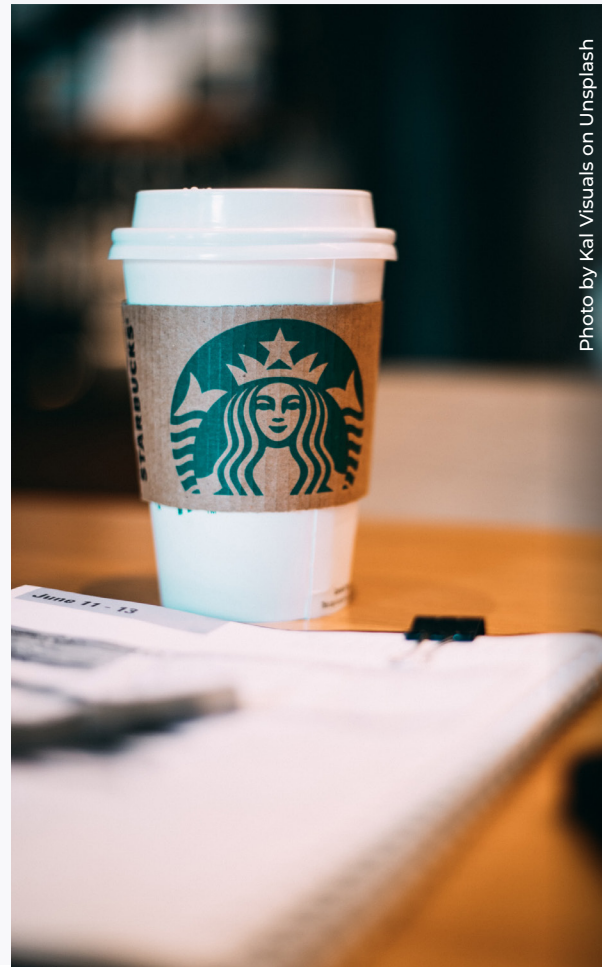


Photo by Kal Visuals on Unsplash








Photo by Brooke Cagle on Unsplash



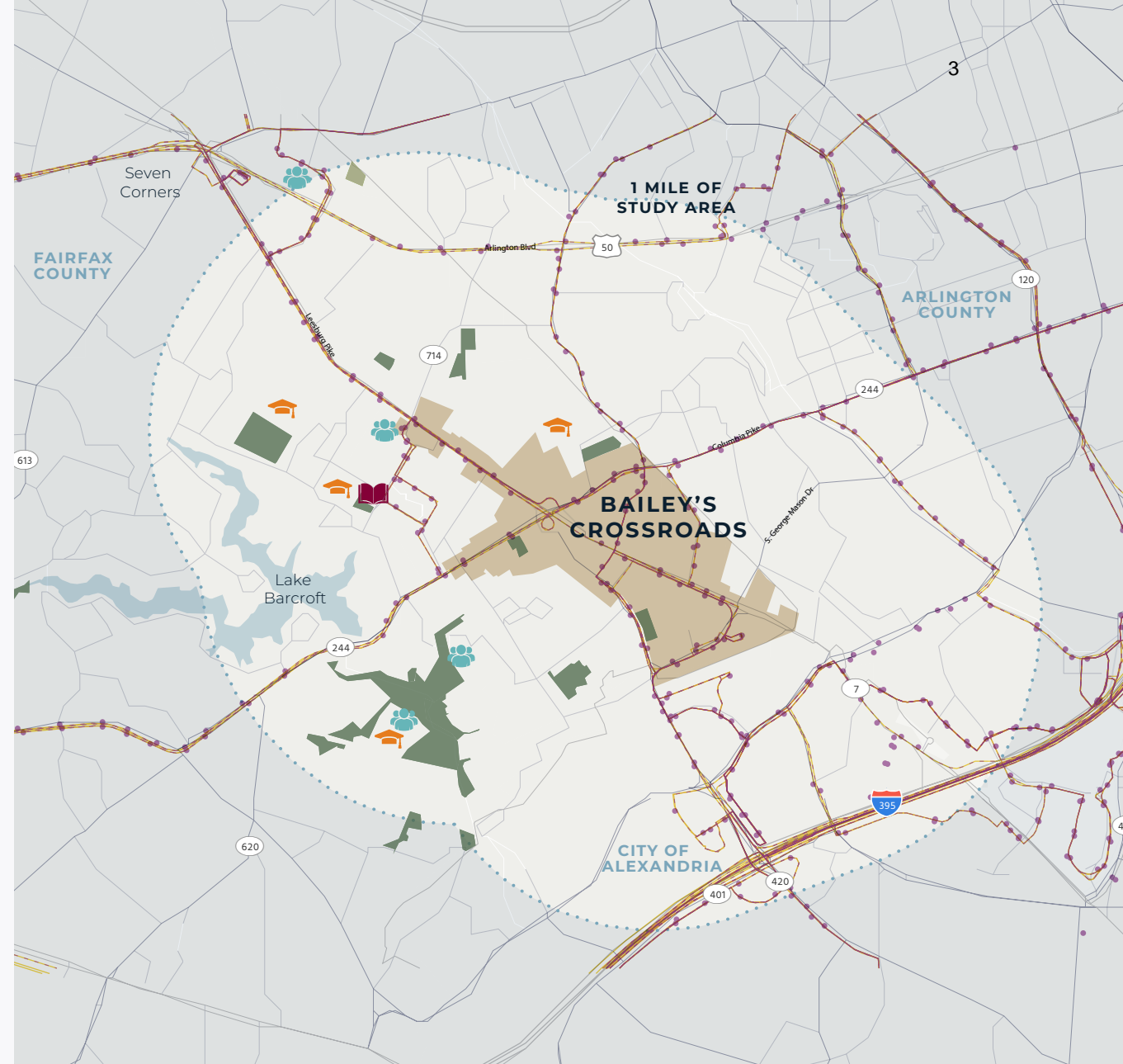
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



# BAILEY'S CROSSROADS

Covering 431 acres, Bailey's Crossroads Community Business Center (CBC) is a large, community-serving commercial area that contains several individually owned shopping centers. The areas surrounding these commercial centers are predominantly stable neighborhoods, with a large component of multi-family residential housing a diverse population.

	<b>WALK SCORE*</b> Somewhat Walkable. Some errands can be accomplished on foot.	64
	<b>TRANSIT SCORE*</b> Good Transit. Many nearby public transportation options.	51
	<b>BIKE SCORE*</b> Bikeable. Some bike infrastructure.	53
	<b>HOUSEHOLDS WITHOUT VEHICLE – ESRI</b>	11.4%
	<b>HOUSEHOLDS WITHIN 10-MIN CAR RIDE – ESRI</b>	123,749

\*Walk Scores, Transit Scores, and Bike Scores come from a third-party data source Walk Score, a subsidiary of Redfin. It is an automated efficiency model focused on location efficiency.



-  Study Area
-  Hospital
-  Bus Stop
-  Scooter Corral
-  1-Mile of Study Area
-  Fairfax County Community Center
-  WMATA Bus Route
-  Scooters & Bike Rack
-  Non-County Parks
-  Fairfax County Public Schools
-  Fairfax Connector Bus Route
-  Roads that Allow Scooters
-  Fairfax County Parks
-  Fairfax County Public Library

# STUDY AREA AT-A-GLANCE

## BUSINESS ENVIRONMENT – ESRI 2023

Number of Employees	25,285
Number of Businesses	2,181

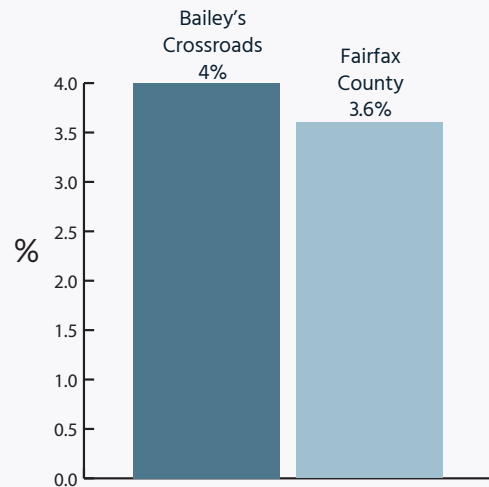
## RESTAURANT ENVIRONMENT – COUNTY FOOD ESTABLISHMENT TABLE

Total Active F&B Permits – As of 2019	74
Total Active F&B Permits – Added Since 2020	30
Total Active F&B Permits	104

## WORKER AGE – CENSUS 2020

	%
29 or Younger	24.3%
30-54 Years Old	51.4%
55+	24.3%

## AVERAGE RETAIL VACANCY – COSTAR 2023



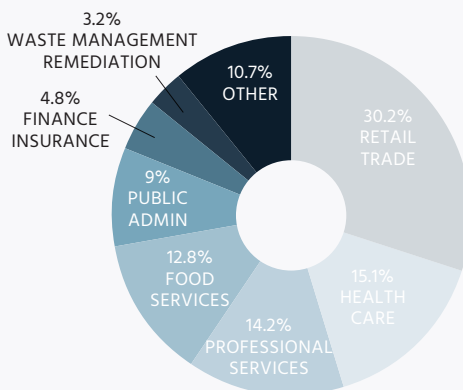
## RENT – COSTAR 2023

	Bailey's Crossroads	Fairfax County
Average Asking Rent (NNN- Triple Net)	\$27.57	\$32.04

## NORTH AMERICAN INDUSTRY CLASSIFICATION SYSTEM

### (NAICS) INDUSTRY SECTOR – CENSUS 2020

Industry Sector	%
Retail Trade	30.2%
Health Care and Social Assistance	15.1%
Professional, Scientific, and Technical Services	14.2%
Accommodation and Food Services	12.8%
Public Administration	9.0%
Finance and Insurance	4.8%
Waste Management and Remediation	3.2%
Other	10.7%



## COMMERCIAL SF - COSTAR 2023

Total Commercial SF	5,244,003
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## Commercial SF by Type

<b>Retail:</b> 2,312,584
<b>Office:</b> 2,665,813
<b>Industrial/Flex:</b> 265,606

## LAND

Land Use Classification / Zoning	Multiple
----------------------------------	----------

## International Council of Shopping Centers (ICSC) Classification

10+ independent shopping districts

Bailey's Crossroads is made up of multiple independent shopping districts with different ICSC classifications ranging from Strip/Convenience Centers, Community Centers, and Neighborhood Centers.









Total Assessed Value – FAIRFAX COUNTY AV DATASET	\$2,503,015,000
--------------------------------------------------	-----------------

## INSIGHTS

- **Healthy overall performance.** While the vacancy is slightly higher than the county-wide average, it is still lower than the national average of 6.7% (Q1 2023), suggesting overall healthy performance and occupancy.
- **Affordable retail space.** Asking rents are markedly lower than the average county-level rates, suggesting opportunities for smaller, less well-capitalized businesses.
- **A True Mixed-Use Community.** Although the area is generally known for its large cluster of shopping centers, there is more office space than retail within the study area, and even a small amount of industrial/flex space.

# USERS AT A GLANCE

## RESIDENTS

DEMOGRAPHIC DATA-AT-A-GLANCE – 2023 ESRI	1 MILE STUDY AREA	FAIRFAX COUNTY + CITY
 Population	97,576	1,180,539
 Population Density (Per Mile)	11,429	2,272
 Daytime Population	72,804	1,253,427
 Bachelor's Degree	36%	33%
 Median Age	37.6	39.5
 Median Household Income	\$88,009	\$139,625
 Median Home Sales	\$508,595	\$699,991
 Communities of Opportunity Index Score*	Very Low to Average	

\* FAIRFAX COUNTY-PRODUCED INDEX

The Index provides a composite rating of how the census tracts located within the study area are doing in relation to resident access to opportunity based on a series of indicators. Examples of the underlying access and wellbeing indicators in the Index include Homeownership, Preschool Enrollment, Life Expectancy at Birth, and Transportation Safety Incidents. The rating classes are very low, low, average, high, and very high. The higher the rating, the better access to opportunity.

## VISITORS

VISITOR DATA – PLACER AI	Q2 - 2019	Q2 - 2023	CHANGE
Visits	5.9 M	6.3 M	6.8% increase
Visitors	1.3 M	1.4 M	7.7% increase
Visit Frequency	4.59	4.57	.4% decrease
Average Dwell Time	162 mins	120 mins	26% decrease

VISITOR DEMOGRAPHICS – PLACER AI	Q2 - 2019	Q2 - 2023	CHANGE
Median Household Income	\$108.5K	\$107.1K	1.3% decrease
Bachelor's Degree Or Higher	61.5%	61.4%	.1% increase
Median Age	40.2	40	.5% decrease
Most Common Ethnicity	White (46.5%)	White (46.7%)	.4% increase
Persons Per Household	2.25	2.25	No change

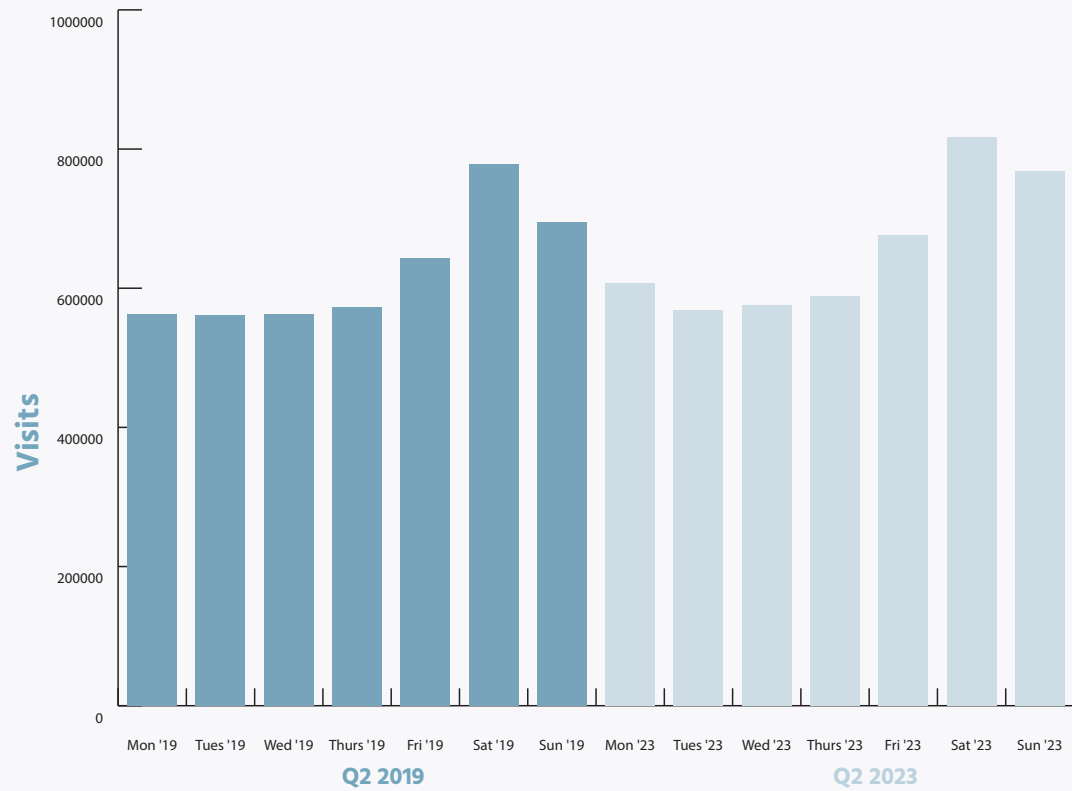
### INSIGHTS

- Visitor growth.** The number of visitors and visits to the study area have slightly grown since 2019, suggesting the area has largely recovered from pandemic impacts.
- Longer dwell times.** Average dwell time has seen a moderate decrease of 26%, but hovers at two hours, suggesting visitors are spending time comparison shopping and grabbing a bite to eat.
- Family households dominate.** Visitors tend to have larger household sizes, indicating that people either shopping or working within the study area are part of family households.
- Lower median age and income.** At 37.6, the median age for those within the study area is slightly lower than the county average. Median household income are markedly lower than the county-wide median.

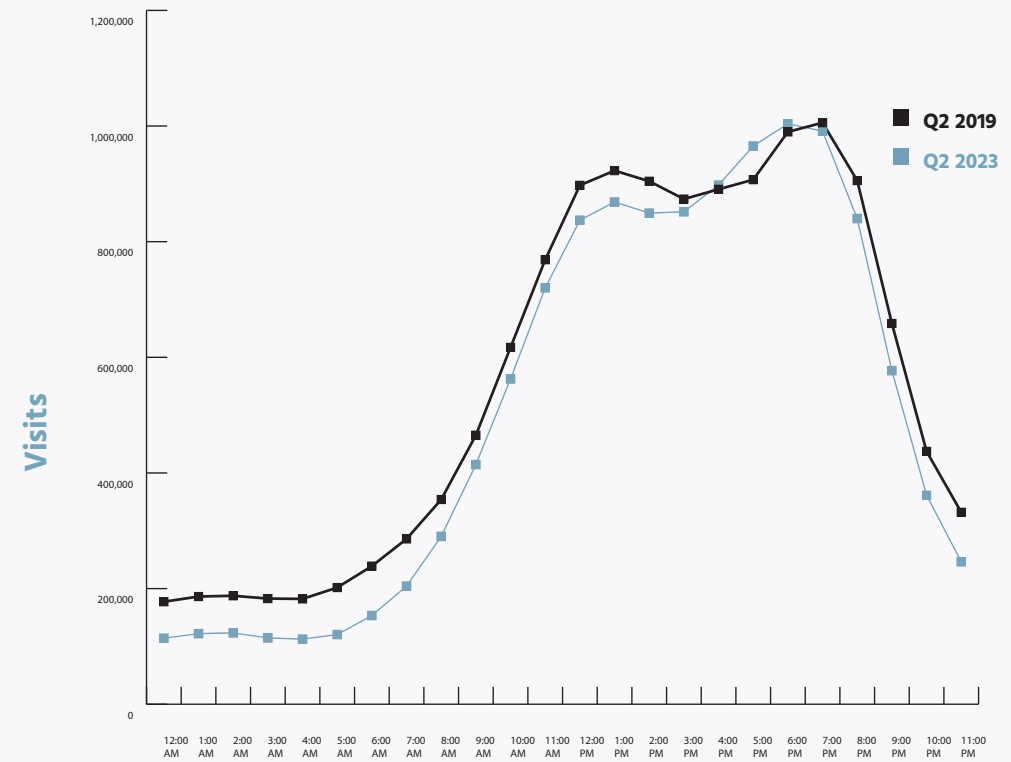
# USERS AT A GLANCE

## VISITORS CONT.

\*Q2 MONTHS: APRIL, MAY, JUNE



Days of the Week



Time of Day

### INSIGHTS

- **Strong weekend activity.** The most popular days of the week are Friday, Saturday, and Sunday, commensurate with the strong set of shopping offerings found throughout the study area.
- **High daytime volume.** Peak periods include both pre- and post-COVID include lunch and after-work, commensurate with a strong day-time worker population. However, the lunch time crowd has declined since COVID, perhaps owing to more hybrid or remote workers.

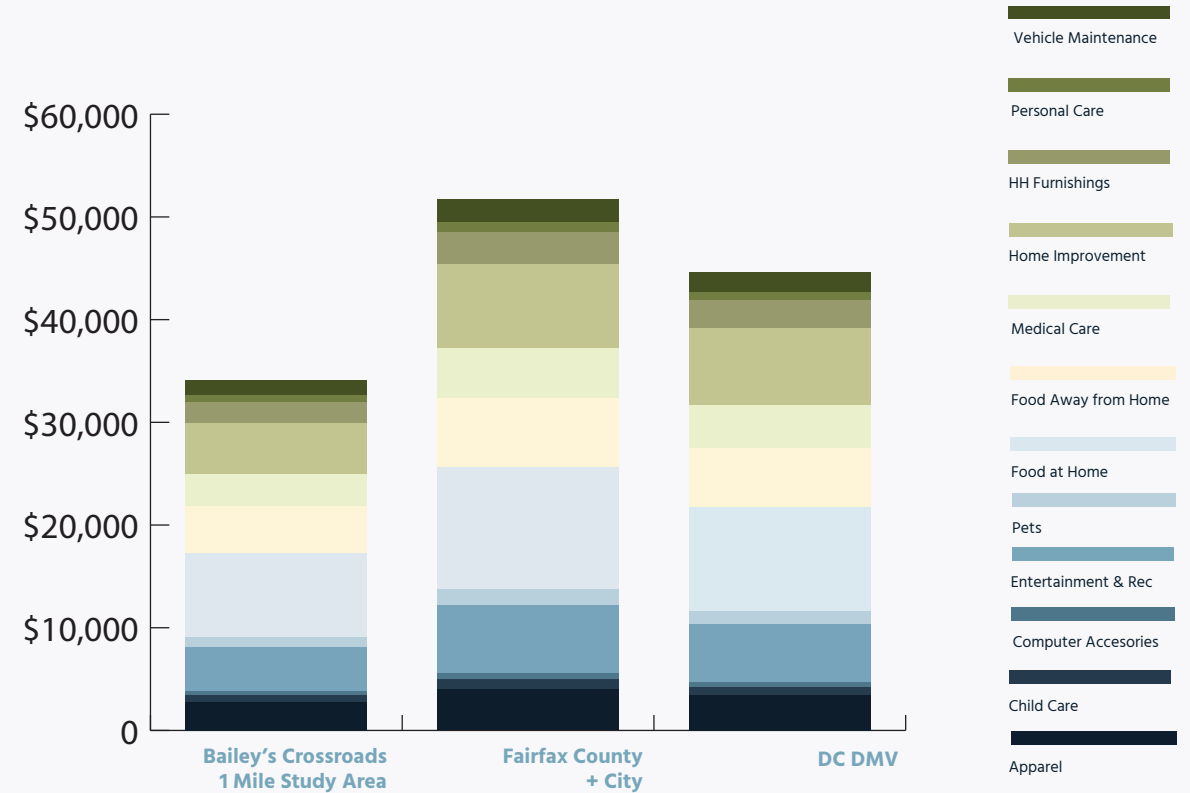
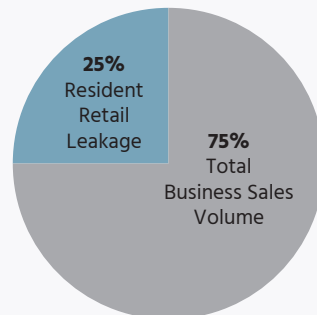
# RETAIL SPEND

AVG ANNUAL CONSUMER RETAIL EXPENDITURES PER HOUSEHOLD – ESRI	Bailey's Crossroads 1 Mile Study Area	Fairfax County + City	Washington Metro Area
Apparel	\$2,763	\$3,989	\$3,411
Child Care	\$653	\$1,028	\$853
Computer & Accessories	\$391	\$566	\$473
Entertainment & Recreation	\$4,256	\$6,599	\$5,558
Pets	\$1,007	\$1,567	\$1,308
Food at Home	\$8,148	\$11,905	\$10,143
Food Away from Home	\$4,601	\$6,683	\$5,702
Health Care	\$640	\$996	\$864
Medical Care	\$2,498	\$3,915	\$3,348
Home Improvement	\$4,969	\$8,110	\$7,528
Household Furnishings	\$2,059	\$3,155	\$2,679
Personal Care	\$676	\$984	\$837
Vehicle Maintenance Repair	\$1,455	\$2,171	\$1,897
<b>Total Average Retail Expenditure/HH</b>	<b>\$33,476</b>	<b>\$51,668</b>	<b>\$44,601</b>

**2023 Total Resident Retail Spending** \$1,267,230,491  
 BY RESIDENTS WITHIN BAILEY'S CROSSROADS 1 MILE STUDY AREA – ESRI

**2023 Total Business Sales Volume** \$946,561,187  
 WITHIN BAILEY'S CROSSROADS 1 MILE STUDY AREA – ESRI

**Resident Retail Leakage** \$320,669,304  
 LEAVING THE 1 MILE STUDY AREA – ESRI



## INSIGHTS

- **Value-oriented customers.** Average retail spending by households within the study area is lower than average household spending at the county and Washington metro level, suggesting a more value oriented customer.
- **Strong sales, that are likely stronger than the official record.** Retail establishments within Bailey's Crossroads record approximately \$946 million in annual sales. This official sales figure however may be higher as it does not account for spending by undocumented residents and cash-only businesses.

# RECENT INVESTMENTS



## BOYD A. & CHARLOTTE M. HOGGE PARK

New Park Development - includes a community garden, multi-sport court (basketball and pickleball), playground, shelter, trails, raingarden, and parking.

# \$2,000,000

### RECENT PUBLIC INVESTMENT

## NEW DEVELOPMENT

### ALTA CROSSROADS

- 3533 Moncure Ave, at the intersection of Columbia Pike
- 370 unit apartment building and 3 townhouses
- Delivery Expected 2025



## MISSION LOFTS

- 5600 Columbia Pike
- 156 live/work units
- Opened 2020

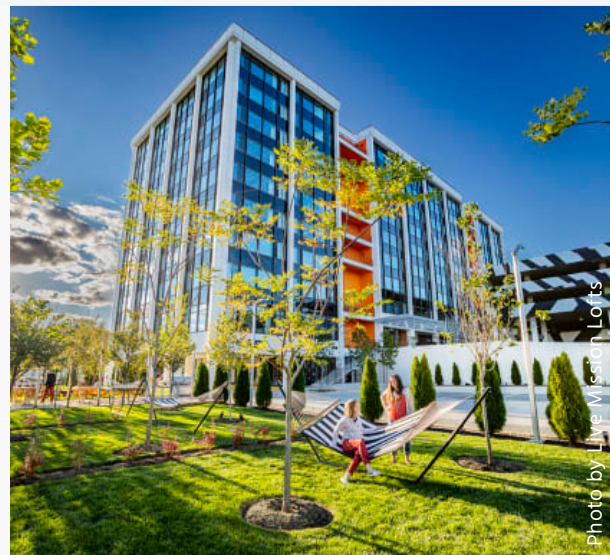
# \$52,000,000

### RECENT PRIVATE INVESTMENT

## NEW DEVELOPMENT

### SKYLINE LOFTS

- 5201-5205 Leesburg Pike
- Up to 720 live/work units in Buildings 1, 2 & 3
- Under Construction and Delivery Expected in 2023
- 5111 & 5113 Leesburg Pike
- Up to 510 live/work units in Buildings 4 & 5
- Entitled, Delivery TBD





# KEY INSIGHTS



## PHYSICAL ENVIRONMENT

Pertains to the conditions of the built environment, issues of accessibility, and ease of movement within the district.



## USER INSIGHTS

Pertains to the balance and impact of residents, employees and customer demographics and preferences.



## BUSINESS ENVIRONMENT

Pertains to the locations of concentrated business activity, destination drivers, and overall real estate conditions.

### INSIGHTS

- Limited connectivity, including pedestrian and bicycle accessibility, between the 10+ independently owned shopping centers in the study area.
- Desire for more community gathering space to linger and create a greater sense of place and community.
- Opportunity to improve people's perception of safety.

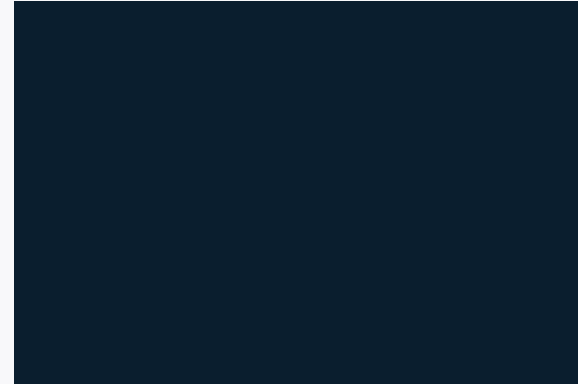
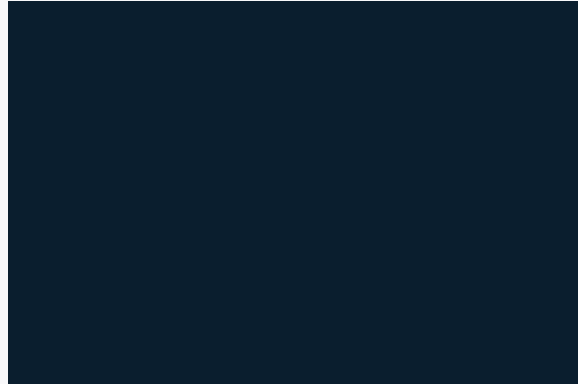
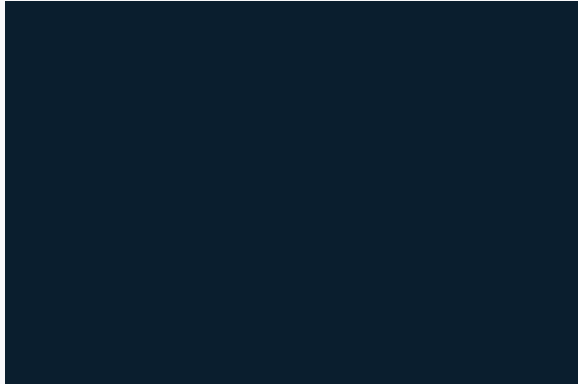
### INSIGHTS

- Visitors tend to have larger household sizes, indicating that people either shopping or working within the study area are part of family households.
- Diverse, value-oriented customer base looking for affordable options for shopping and dining.
- While average dwell time by visitors has decreased, overall the area has seen experience Post-COVID recovery, as signaled by more visits and visitors.

### INSIGHTS

- Diverse offerings, includes retail, office and residential uses
- Multiple properties result in a variety of shopping center identities within a small area.
- Small businesses with limited staff, technical expertise, and capital resources are often challenged owing to a lack of knowledge or awareness of rules and regulations. There are opportunities to explore strategies and technical assistance to support improved compliance among business owners.
- Owners of commercial properties that are cash-flowing and profitable in their current form often do not have strong incentives for upgrading their properties because they do not anticipate that these investments will result in an increase in value and a therefore a return on their additional investment.
- Rich diversity of offerings and an opportunity to embrace different ethnic districts with branding collaboration.

# BUSINESS HIGHLIGHTS



**BUSINESS OWNER NAME**  
**BUSINESS NAME**  
**ESTABLISHED IN XXXX**

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**BUSINESS OWNER NAME**  
**BUSINESS NAME**  
**ESTABLISHED IN XXXX**

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**BUSINESS OWNER NAME**  
**BUSINESS NAME**  
**ESTABLISHED IN XXXX**

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**BUSINESS OWNER NAME**  
**BUSINESS NAME**  
**ESTABLISHED IN XXXX**

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# CONTACT

## FAIRFAX COUNTY DEPARTMENT OF ECONOMIC INITIATIVES

PHONE: (703) 324-5171 TTY 711 | EMAIL: [EconomicInitiatives@fairfaxcounty.gov](mailto:EconomicInitiatives@fairfaxcounty.gov)  
[www.fairfaxcounty.gov/economic-initiatives/](http://www.fairfaxcounty.gov/economic-initiatives/)

The Fairfax County Department of Economic Initiatives (DEI) leverages county resources and develops policy recommendations to foster economic development and position Fairfax to be an economically competitive and prosperous community. It also works with small, local businesses to advise and guide them as they grow.

PRESENTED BY



# GLOSSARY

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**NG&S** – Neighborhood Goods & Services

**GAFO** – General Merchandise, Apparel, Furniture, Other Goods

**F&B** – Food and Beverage

**NAICS** – North American Industry Classification System

**ICSC** – International Council of Shopping Centers

**NNN** – Triple Net

# APPENDIX – ESRI

	1 Mile	Fairfax County + City	Washington Metro Area
Population	97,576	1,180,539	6,459,163
Daytime Population	72,804	1,253,427	6,616,844
Male	48,849	586,372	3,165,382
Female	48,727	594,167	3,293,781
High School Graduate Only	15%	13%	18%
Graduate/Professional Degree	36%	33%	27%
Population Density (per mile)	11,429	2,972	1,154
Unemployment Rate	3.9%	3.4%	3.7%
English Spoken Not Well or Not At All	10.4%	5.8%	4.8%

POPULATION BY RACE & ETHNICITY	1 Mile	Fairfax County + City	Washington Metro Area
White Alone	48.6%	48.1%	43.1%
Black Alone	15.1%	9.5%	24.6%
American Indian Alone	0.6%	0.6%	0.7%
Asian Alone	17.8%	21.1%	11.4%
Pacific Islander Alone	0.1%	0.1%	0.1%
Some Other Race Alone	9.0%	9.0%	9.7%
Two or More Races	8.9%	11.7%	10.5%
Hispanic Origin	14%	18.2%	18.1%

	1 Mile	Fairfax County + City	Washington Metro Area
# of Households	40,939	423,011	2,399,305
Average HH Size	2.37	2.76	2.65
Child Population	20.3%	22.6%	22.1%
Owner-Occupied	39.6%	65.0%	60.3%
Renter-Occupied	60.4%	30.8%	33.9%
Median Home Value	\$508,595	\$704,294	\$555,476

	1 Mile	Fairfax County + City	Washington Metro Area
Median HH Income	\$88,009	\$139,625	\$113,725
Households Below Poverty Line	13.1%	6.2%	7.7%
Per Capita Income	\$52,986	\$70,037	\$60,786
Average HH Disposable Income	\$70,316	\$108,208	\$89,618

HOUSING UNITS BY VALUE	1 Mile	Fairfax County + City	Washington Metro Area
\$50,000	1.1%	0.8%	1.6%
\$50,000 - \$99,999	0.0%	0.2%	0.5%
\$100,000 - \$149,999	1.5%	0.1%	0.6%
\$150,000 - \$199,999	4.4%	0.6%	1.4%
\$200,000 - \$249,999	6.2%	1.2%	2.8%
\$250,000 - \$299,999	6.0%	2.0%	4.1%
\$300,000 - \$399,999	15.2%	5.4%	15.9%
\$400,000 - \$499,999	14.5%	9.5%	16.2%
\$500,000 - \$749,999	28.7%	36.9%	31.0%
\$750,000 - \$999,999	15.6%	27.4%	15.0%
\$1,000,000 - \$1,499,999	4.5%	10.8%	7.2%
\$1,500,000 - \$1,999,999	1.7%	2.9%	2.0%
\$2,000,000+	0.5%	2.1%	1.7%

HOUSING UNITS BY TYPE	1 Mile	Fairfax County + City	Washington Metro Area
1, Detached	15.4%	46.2%	45.2%
1, Attached	11.1%	23.2%	19.6%
2	1.7%	0.4%	1.0%
3 to 4	4.6%	1.5%	2.4%
5 to 9	12.8%	5.1%	5.1%
10 to 19	12.9%	9.7%	8.5%
20 to 49	5.0%	2.8%	3.1%
50 or more	36.5%	10.6%	14.4%
Mobile Home	0.0%	0.4%	0.6%
Boat, RV, Van, etc.	0.0%	0.0%	0.0%
Median Home Sales			\$771,234

MEDIAN AGE	1 Mile	Fairfax County + City	Washington Metro Area
	37.6	39.5	38.2.6
Age < 20	22%	18.2%	24.7%
Age 20-34	22.9%	18.2%	20.5%
Age 35 - 64	41.4%	41.2%	39.8%
Age 65+	13.7%	15.5%	15.1%