



Lorton
Market Assessment

Prepared for:
Fairfax County Department of
Planning and Development

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Contents

I. Introduction.....	1
II. Demographic and Real Estate Trends.....	3
Population and Households.....	4
Households by Income.....	8
Employment Profile.....	9
Commuting.....	9
Housing Stock.....	10
Household Growth Forecasts.....	11
III. Commercial Market Analysis.....	13
Existing Retail Conditions.....	13
Retail Categories and Trends.....	16
Retail Demand.....	18
Shoppers Goods Potential.....	19
Neighborhood Goods & Services.....	20
Eating & Drinking.....	21
Retail Demand Conclusions.....	22
Niche Retail Opportunities.....	24
Office Market Conditions.....	27
Office Demand Conclusions.....	29
Light Production Market Conditions.....	30
Light Production Demand Conclusions.....	32
IV. Residential Market Analysis.....	34
Rental Conditions.....	34
Lorton Area Rental Housing.....	35
For-Sale Residential.....	37
Residential Demand.....	40
For-Sale Demand.....	40
Rental Housing Demand.....	41
Appendix A. Tables.....	42

I. Introduction

The Fairfax County Board of Supervisors authorized the Lorton Visioning Comprehensive Plan Amendment study on January 26, 2020. The Lorton Visioning Study is analyzing adopted land use recommendations along with the area's environmental corridors, historic resources, public facilities including multi-modal transportation assets, parks and recreation amenities and other infrastructure as the County considers a Comprehensive Plan Amendment to guide both public and private development over the next two decades. Lorton Visioning is being guided by a task force with members from various areas throughout the Lorton community who were appointed by Mount Vernon Supervisor Dan Storck and have been supported by staff from the Department of Planning and Development along with several other County agencies. The task force has been meeting since early 2019.

Map 1. Study Area Map





Currently the Lorton area, located along the southern portion of Fairfax County, offers expansive recreational opportunities. Commercial development is centered around the Virginia Railway Express (VRE) station and the Lorton Station, Lorton Marketplace and Gunston Plaza shopping centers. The area also includes major public infrastructure facilities, a strong industrial sector and redevelopment of properties that formerly served as the Lorton Reformatory and Penitentiary complex and workhouse— now developed with residential mixed-use and commercial development, and arts and entertainment and recreational amenities on 55 acres.

The Lorton VRE station is located in Fairfax County along the Fredericksburg Line of the VRE commuter rail. The area surrounding the station consists of suburban-style residential developments, suburban shopping centers and industrial land supporting warehouse/ distribution, public service and light industrial clusters. The transportation network surrounding and within Lorton includes Interstate 95, Richmond Highway (U.S. Route 1) and major thoroughfares including Ox Road (Route 123) and Lorton Road (Route 642).

Lorton's location sits between two major employment centers of Fredericksburg to the south and Washington D.C. to the north and adjacent to U.S. Army Installation Fort Belvoir, the largest employer in Fairfax County.

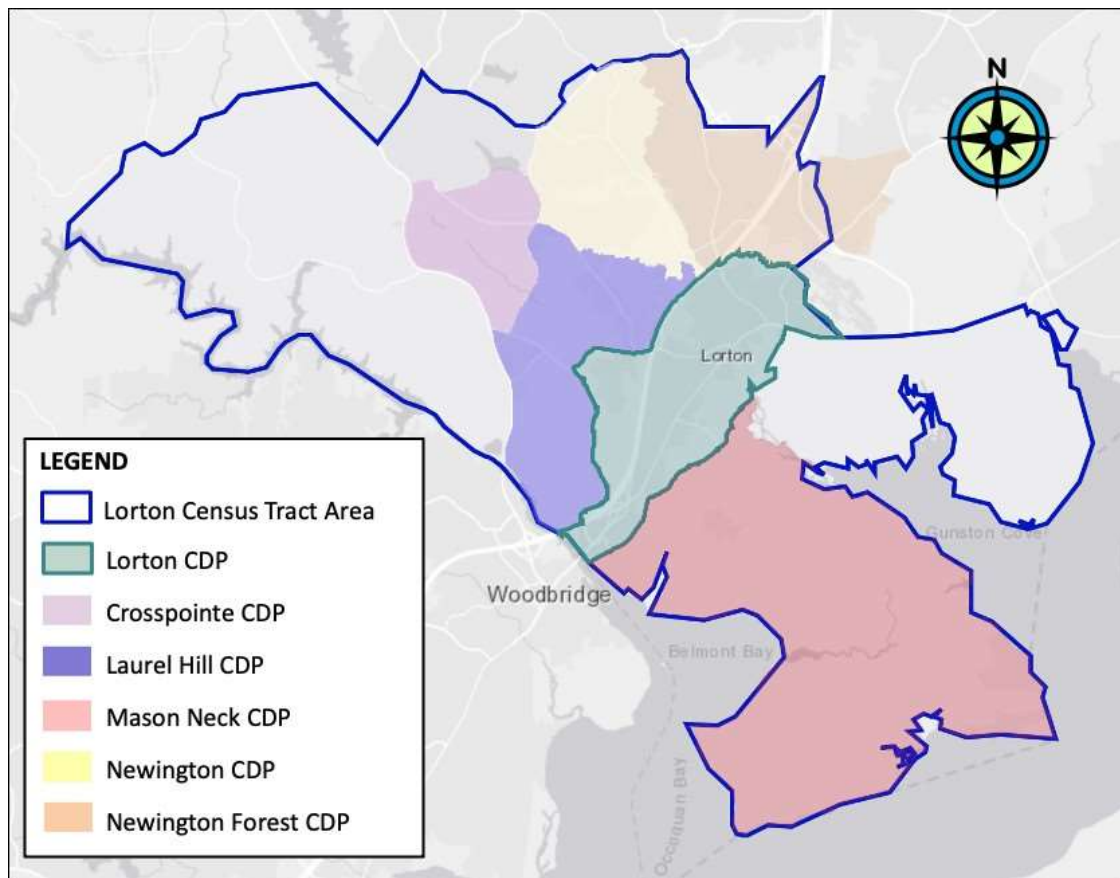
The Lorton residential community consists primarily of detached homes with townhouses and a series of multi-family apartment buildings. The for-sale housing market remains fairly stable with limited opportunities to expand single-family offerings under the current zoning provisions. The 13 existing rental apartment buildings offer more than 3,480 units. The multi-family market continues to gain momentum with newly built (in 2017 and 2019) complexes and stable occupancy over the last ten years.

This report begins with a demographic analysis of area residents and then evaluates residential development opportunities, followed by discussion of commercial development opportunities – both retail and office.

II. Demographic and Real Estate Trends

Area demographics are the foundation of market analyses. The Lorton Census Tract Area drawn to profile the local population includes 16 Census Tracts¹ and six (6) Census Defined Places (CDP) – Lorton, Crosspointe, Laurel Hill, Mason Neck, Newington and Newington Forest – as shown on Map 1. Population and household characteristics and trends detail the socio-economic characteristics of the surrounding community. Distinct trade areas, which vary based on retail category and are defined by ZIP code for this study, represent the households likely to generate the bulk of the customer base. Details on those trade areas can be found in the commercial market section of the report. Data for Fairfax County are provided for comparison purposes.

Map 2. Lorton Area Geographies



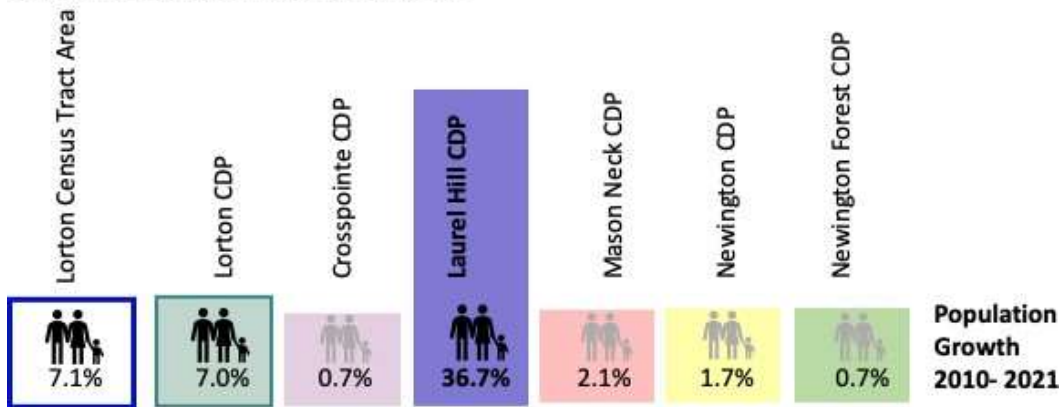
¹ The Lorton Census Tract Area includes the following 16 Census Tracts: 4162, 4163, 4220, 4221.01, 4221.02, 4222.01, 4222.02, 4326, 4327.01, 4327.02, 4323, 4922.01, 4922.02, 4922.03, 4923, and 49.24.

Population and Households

General demographic and economic trends for Fairfax County indicate a 5.5-percent growth in the number of residents from 2010 to 2021, and 7.1 percent in the Lorton Census Tract Area. This residential growth reflects the county’s economic attractiveness and excellent quality of life – with proximity to employment centers, excellent schools and health care services. Within the Lorton area, the suburban and built-out CDPs (Crosspointe, Mason

Neck, Newington and Newington Forest) achieved population growth of 0.7 to 2.1 percent from 2010 to 2021. The rapid population growth of 53.5 percent in the Laurel Hill CDP from 2000 to

Figure 1. Population Growth, 2010-2021



2010 continued with gains of 36.7 percent during the last 11 years, reflecting the impact of the former Lorton Reformatory and Penitentiary redevelopment and other large suburban residential developments. Lorton CDP gained 1,305 new residents or 7.0 percent from 2010 to 2021. In comparison, the Washington DC metropolitan area had 11.4 percent new residents from 2010 to 2021 with growth predominantly in suburban areas that began to urbanize.

Households grew at a slower rate than did population in Lorton and Laurel Hill CDP from 2010 to 2021 with the addition of 204 and 705 new households, respectively. Newington and Newington Forest represent the most built-out CDPs with an addition of only 77 and 44 new households during the same period, while Crosspointe and Mason Neck continued a suburban standard of development, adding fewer than 25 households in total. The Lorton Census Tract Area added 1,234 new households (5.5 percent) from 2010 to 2021 keeping pace with Fairfax County’s 5.4-percent household growth during the same period, based on estimates prepared by Esri, a national demographic data provider. The large majority of this growth reflects new residential development activity spurred by the quality of life in Fairfax County and land available for development (See Appendix Table A1).

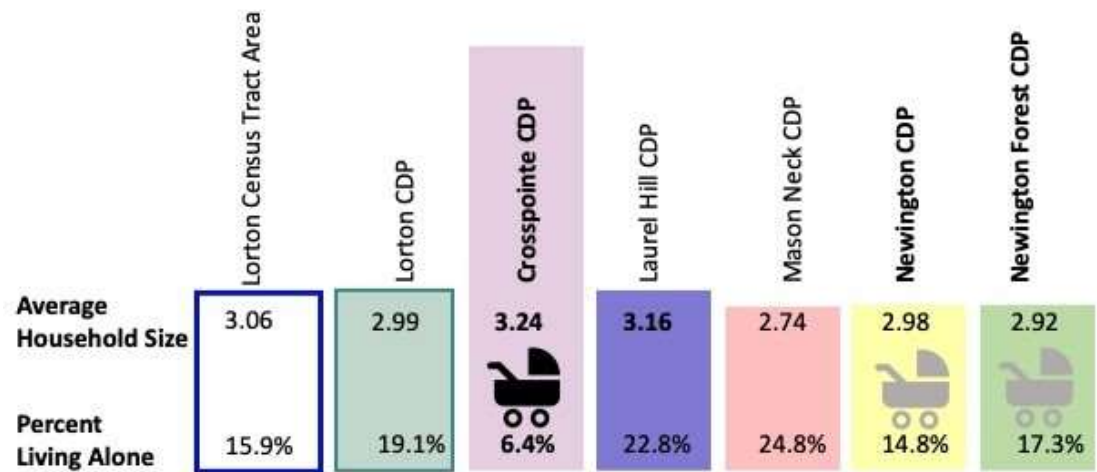
Larger households continue to seek suburban development options and consider the southern tier of Fairfax County as an ideal location. While smaller households dominate urban environments, the more suburban Lorton Census Tract Area had an average size of

3.06 persons per household in 2021 as compared with 2.65 in the Washington DC metropolitan area² and 2.74 in Fairfax County. The 15.9 percent of Lorton Census Tract Area households represented by single persons living alone is significantly smaller than the 22.5 percent in Fairfax County and the 27.2 percent in the metro region. More detail provided in Appendix Table A2.

Within the Lorton Census Tract Area, the median population age of 37.2 years is only slightly younger than Fairfax County’s population with a median age of 39.3 years in 2021. (See Appendix Table A3.) In both Crosspointe and Mason Neck, residents aged 65 or over make up a large share of the population relative to 14.9 percent in Fairfax County. In Mason Neck, 24.3 percent of residents are over the age of 65 and another 18.7

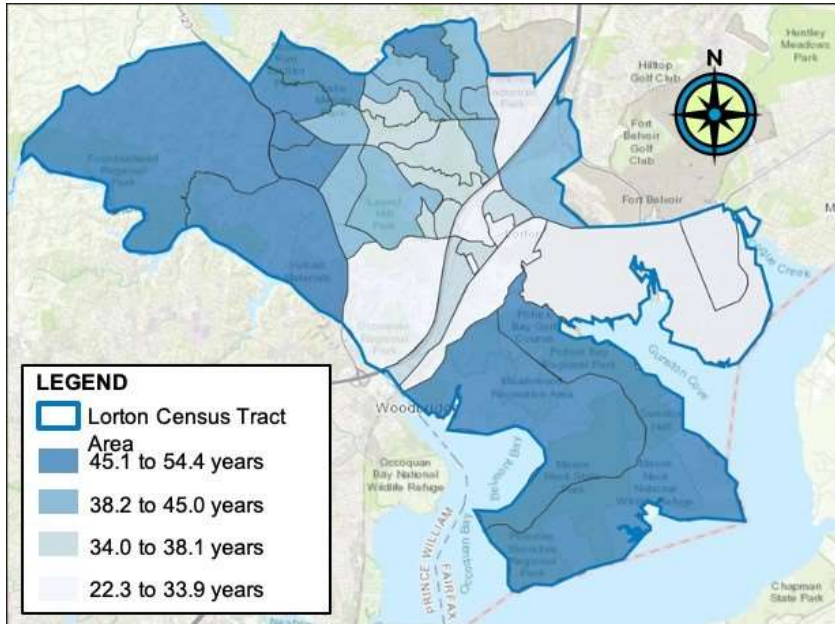
percent are between 55 to 64 years. In Crosspointe, 11.8 percent are 65 or older and 20 percent of residents are between 55 to 64 years. Appendix Table A4 shows that the share of residents under the age of 25 is declining in Fairfax County and Baby Boomers are swelling the number of persons aged 65 or over. These trends are projected to continue over the next decade. Map 3 shows the median age distribution by census tract in 2021.

Figure 2. Average Household Size / Percent Living Alone



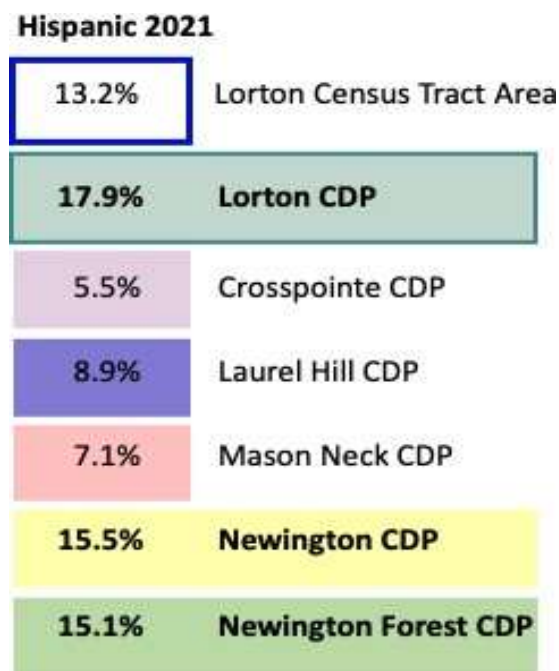
² Washington DC metropolitan area includes the following counties: Arlington, Calvert, Charles, Clarke, Culpeper, Fairfax, Fauquier, Frederick, Jefferson, Loudoun, Madison, Montgomery, Prince George’s, Prince William, Spotsylvania, Stafford, and Warren counties. Cities of Alexandria, District of Columbia, Fairfax City, Falls Church, Manassas and Manassas Park.

Map 3. Median Age Distribution by Census Tract, 2021



The population within the Lorton Census Tract Area and each distinct CDP includes pockets of ethnic and economic diversity in 2021, as shown on Figure 3. Overall, the communities represent largely (more than 50 percent) Caucasian populations with 86.8 percent of the population self-identifying as Caucasian in Mason Neck CDP and 73.9 percent in Crosspointe CDP as the highest concentrations. In both the Laurel Hill and Lorton CDPs, roughly one-third are Caucasians. In Laurel Hill, 22.3 percent of residents self-identify as Black and another 33.6 percent as Asian. Lorton mirrors these trends with slightly more Black residents and Asians representing one in five residents. Lorton, Newington and Newington Forest CDPs include more than 15 percent Hispanic residents. In both Fairfax County and the Washington DC metropolitan region, 17.1 percent of the population identify themselves as Hispanic, based on data from Esri shown in Appendix Table A5.

Figure 3. Percent Hispanic 2021





A review of different languages spoken at home in 2021 show the further diversity of residents living within the Lorton communities, as shown on Figure 4. In both the Lorton and Laurel Hill CDPs populations, 46.1 percent and 47.8 percent speak languages other than English at home, respectively. In both Newington and the Lorton Census Tract Area as a whole, one-third of residents speak a language other than English at home. Mason Neck has the lowest percent of residents speaking another language with 6.4 percent or 123 residents.

Appendix Table A6 shows households by tenure, which offers information on the number of renters and homeowners from 2000 to 2019. In Fairfax County owner households represent 68 percent of all county households, compared to 64 percent in the Washington DC metropolitan area. Three-quarters of households in the broader Lorton Census Tract Area and each of six independent CDPs own their own homes. Lorton CDP has 40 percent renter households as of 2019 American Community Survey estimates. In both Crosspointe and Newington Forest CDP, households overwhelmingly own their own homes with 94 and 90 percent owners, respectively.

The demographic data highlight the large number of families within the Lorton communities. The more suburban locations and residential subdivisions with family housing attract a larger proportion of family households with nearly all (93 percent) of Crosspointe CDP households defined as families according to the American Communities Survey Data (2015-2019). This compares to 71 percent family households in Fairfax County.

Figure 4. Other Languages Spoken
Speaks Other Language, 2019

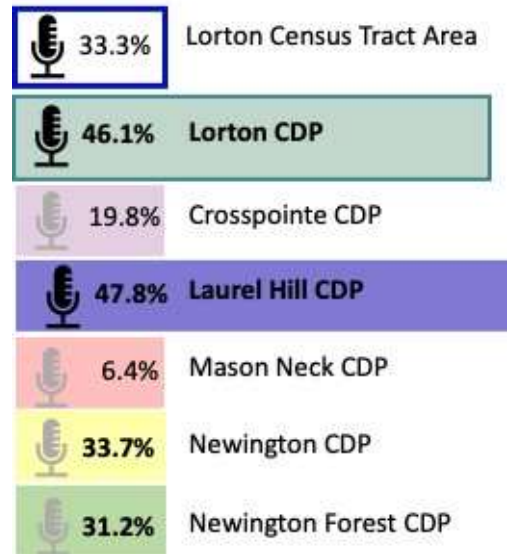
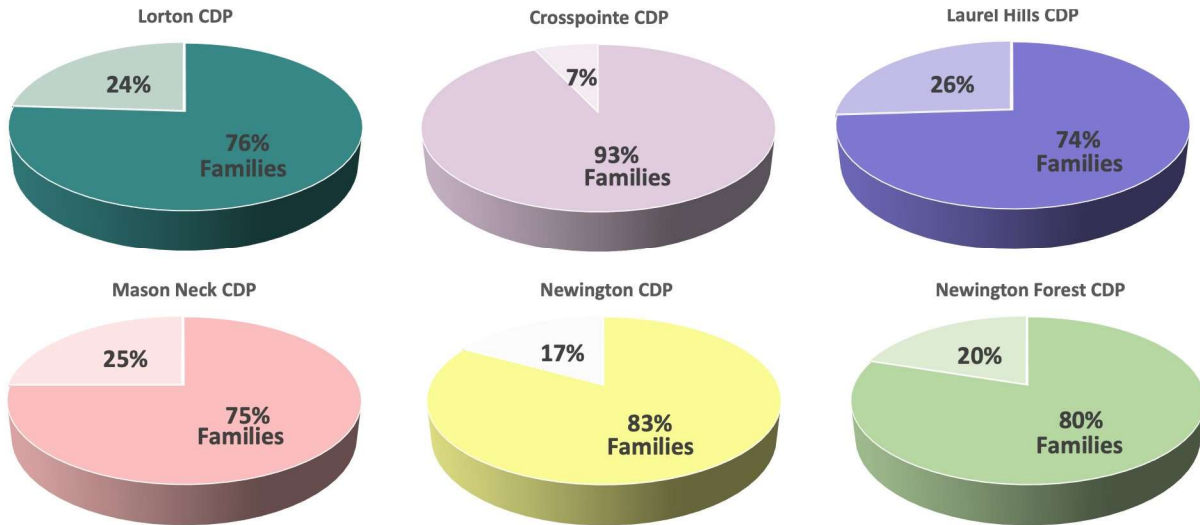


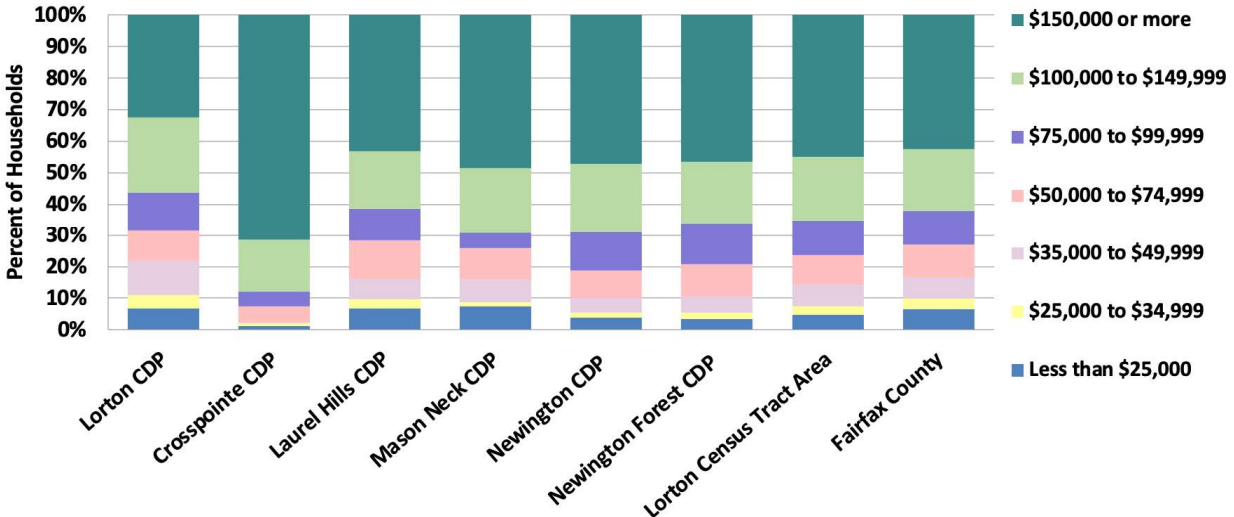
Figure 5. American Communities Survey Families



Households by Income

The 2021 household incomes in the Lorton Census Tract Area reflect many high earning households with incomes in excess of the Fairfax County median household income, as shown on Figure 6 and Appendix Table A8. Fairfax County’s median household income of \$125,986 exceeds the Washington DC metropolitan area median household income of \$106,156 by 18 percent, based on Esri data. Within the Lorton Census Tract Area boundary, Esri reports a median household income of \$133,474 – roughly six percent higher than in Fairfax County. Crosspointe CDP has the highest median household income at \$200,001 with 71.4 percent of its households earning in excess of \$150,000 annually. In contrast, the Lorton CDP’s household median income of \$109,113 is 13.4 percent below Fairfax County with less than one-third of households earning more than \$150,000. In Mason Neck 48.4 percent of households have incomes in excess of \$150,000 for a median household income of \$144,757. The higher income distribution highlights the presence of Fort Belvoir and other nearby employment centers, which offer two-earner households more employment options, as well as the higher incomes required to afford waterfront homes.

Figure 6. Households by Income, 2021



Employment Profile

Shown in Appendix Table A-9, 77.3 percent of Lorton Census Tract Area residents are employed in white-collar occupations in 2021 based on data from Esri. This aligns well with both Fairfax County’s 78.6 percent of residents working in white-collar occupations and the Washington DC metropolitan area’s 74.4 percent of employed residents in white-collar jobs. The CDPs with high median incomes tend to have the highest percentage of residents working white-collar occupations with more than 80 percent of Crosspointe, Laurel Hill, Mason Neck and Newington Forest resident workers employed in white-collar jobs. Lorton CDP remains the outlier with 64 percent working in white-collar jobs, 18.7 percent in service jobs and another 16.9 percent in blue-collar jobs, which range from construction to repair and cleaning services. This compares with 10 percent of Fairfax County residents in blue-collar jobs in 2021.

Commuting

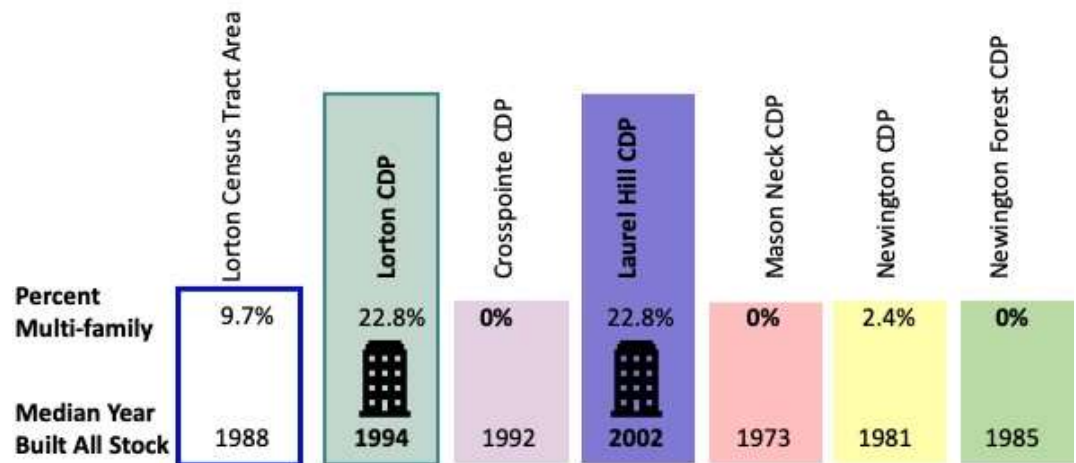
In this suburban community many residents drive alone to work, using the excellent interstate access to the region’s many employment centers. Within all of Fairfax County only 9.6 percent of resident workers use public transit to commute to work. In both Lorton and Laurel Hill, 11.3 percent of resident workers commute to work using public transportation – as compared with 9.1 percent of the broader Lorton Census Tract Area residents (Appendix Table A10) in 2019 based on American Community Survey data. This reflects the advantages of easy access to the VRE system and local bus service, including Vamoose.

Housing Stock

Overall, the Lorton Census Tract Area’s housing consists of a relatively uniform housing stock with single-family detached and attached units comprising 87.2 percent of the housing stock as compared to 70 percent in Fairfax County. Among the communities or CDPs, Crosspointe, Mason Neck and Newington Forest CDPs have no multi-family units, as shown in Figure 7.

Figure 7. Percent Multi-family & Median Year Built Total Housing Stock

The age of the housing stock within the Lorton Census Tract Area and each CDP shows the pattern of residential development in each CDP and the more recent efforts to add more multi-family housing options. These



more recent developments include the 300 multi-family units added in 2011 and the 165 units added at Liberty Crest in 2017 (refer to Table 3 for more details). In the Lorton Census Tract Area, Newington and Newington Forest CDPs share a median year built in the 1980s. In Crosspointe and Lorton CDPs, the median year built consists of 1992 and 1994, respectively. This compares with Fairfax County’s median year built of 1982, which has only 3.0 percent of its housing built since 2010 (based on the 2015-2019 average). Laurel Hill has the highest percentage of recently built units with 4.9 percent constructed since 2010. More details on the housing stock based on units per year built and scale of project are shown in Appendix Tables A11 and A12.

American Community Survey (ACS) data provides a breakdown of the ownership and rental housing units, highlighting trends in tenure. In this suburban community many of the CDPs have high percentages of homeownership. In the Mason Neck CDP, 89 percent of all housing units consist of owner-occupied housing units with both Newington and Laurel Hill CDPs following suit with 83 and 78 percent owner-occupied housing units in 2019. This compares to only 60 percent are owner occupied in the Lorton CDP, which offers more than 2,650 rental housing units based on ACS 2019 data.

Mobility statistics for the Lorton Census Tract Area households indicate that 23 percent of all renter households in 2019 moved into their homes since 2017, based on ACS data.



Interestingly one-third of all renter households moved during 2015 to 2016 years. It is important to note that these statistics do not account for households that moved multiple times during the two-year period. As would be expected Lorton Census Tract Area owner households move less frequently with only 6 percent of owner households moved into their homes since 2017.

Household Growth Forecasts

The future of residential demand depends not only on market considerations but the availability of land for residential development. The southern section of Fairfax County has limited land available for residential development due to environmental constraints, zoning and other regulations impacting development. Recent residential expansion has taken advantage of the newly available land on the former Lorton Reformatory site and other sections of Laurel Hill, Crosspointe, Newington and Lorton CDPs.

Based on forecasts generated by the Metropolitan Washington Council of Governments (MWCOCG), the Fairfax County population will continue to increase with household growth expected to add approximately 94,400 new households by 2040, reaching 508,900 total households³. The household growth within the Lorton Census Tract Area is projected to account for only 1.4 percent of the total new county households, gaining 1,302 new households during the same time period, as shown in Table 1.

Geography	Year						2020 2045 Change	
	2020	2025	2030	2035	2040	2045	Number	Percent
Census-Defined Place¹								
Lorton	6,119	6,231	6,407	6,586	6,796	6,996	877	14.3%
Laurel Hill	2,749	2,814	2,865	2,903	2,947	2,989	240	8.7%
Crosspointe	1,706	1,696	1,698	1,696	1,675	1,685	(21)	-1.3%
Mason Neck	797	809	811	813	814	815	18	2.2%
Newington	4,890	4,822	4,841	4,852	4,863	4,874	(16)	-0.3%
Newington Forest	5,044	5,045	5,080	5,119	5,127	5,182	138	2.7%
Lorton Census tract Area total								
16 Census Tracts	20,089	20,225	20,515	20,788	21,076	21,391	1,302	6.5%
Note: ¹ Totals differ from Census estimates due to boundary differences between CDPs and the Traffic Analysis Zones used for the transportation model forecasts.								
Source: Round 9.2 Model, Metropolitan Washington Council of Governments, 2021; Partners for Economic Solutions, 2021.								

³ Metropolitan Washington Council of Governemnts (MWCOCG) Round 9.2 household and employment forecast for 2020-2045, provided by the Fairfax County Department of Planning and Development, Planning Division, December 11, 2020.



These forecasts are generally consistent with recent trends and known development pipeline projects.

III. Commercial Market Analysis

The analysis of commercial potential in the Lorton area relies on comparison of the spending of area residents to the sales of existing businesses for different types of retail goods and services in the Lorton area as well as evaluation of the impact of emerging trends including e-commerce and shifting office space utilization.

Existing Retail Conditions

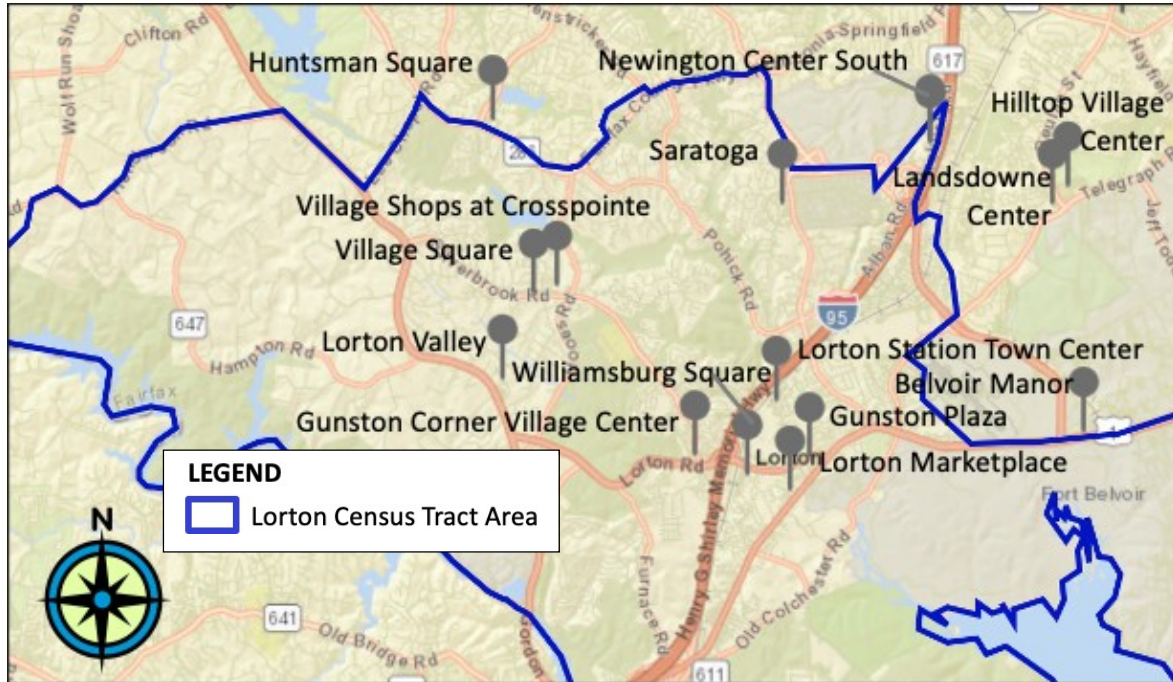
The Lorton communities sit in close proximity to major regional and national mall operations that attract local, regional, national and international customers. CoStar data reveal that more than 17 million square feet of retail exists within a 15-minute drive of the Lorton VRE station during rush hour traffic. That space enjoys a healthy vacancy rate of 4.2 percent overall. The largest shopping centers with both retail and entertainment offerings include Springfield Town Center, Kingstowne Towne Center (a community center with 180,000 square feet of retail) Stonebridge at Potomac Town Center (a lifestyle center) and Potomac Mills (a super regional mall with more than 1.5 million retail square feet). Each of these centers offers a wide variety of restaurants, retail stores, and entertainment venues, including movie theaters and arcades.

Map 4. Lorton Retail 15-Minute Drive Time Map



The Lorton shopping center retail inventory is concentrated primarily along Lorton Road (Route 642), Ox Road (Route 123), Telegraph Road (Route 611), and Richmond Highway (U.S. Route 1). The three largest shopping centers are Gunston Plaza, Lorton Marketplace and Lorton Station Town Center at the Lorton VRE station.

Map 5. Lorton Retail Shopping Centers



The Lorton ZIP code 22079, as illustrated on Map 5, has a total inventory of approximately 700,000 square feet of retail space in 38 properties. Shown in Table 2, roughly one-third of the space was built before 1990 with the largest amount (47.3 percent) of space constructed from 2000 to 2009. Lorton’s retail space conditions vary greatly between high to moderate quality shopping centers and pad site options. A few of the retail locations do not meet modern retailers’ needs but offer rents commensurate with their condition. It is important to note that a visual survey revealed that only a small portion of the Lorton retail is in need of a facelift. Almost exclusively auto-oriented, the Lorton’s retail shopping centers lack amenities for pedestrians and transit riders, with the exception of ground-floor retail space adjacent to the VRE station.

Table 2. 2021 Retail Inventory By Year Built (ZIP 22079)

Year Built	Building Count	Total Square Feet	Percent
Prior to 1960s	7	19,070	2.7%
1970s	4	19,296	2.8%
1980s	5	191,811	27.4%
1990s	5	22,601	3.2%
2000 to 2009	10	330,833	47.3%
2010 to current	3	116,403	16.6%
Subtotal		700,014	100.0%

Source: CoStar, Inc 2021; Partners for Economic Solutions, 2021.



However, this space around the station has significant vacancies and has shown an inability to stay consistently leased.

A review of the retail inventory highlights stable occupancies across all spaces with a corridor vacancy of less than two percent. A five-percent vacancy rate is considered healthy, and many commercial corridors of similar vintage have much higher vacancy rates. The retail at the Lorton Station area has a slightly elevated vacancy rate at 6.5 percent for first-floor retail space. This higher vacancy rate reflects lack of visibility from any major arterial roadway such as Lorton Road and limited daytime activity.

Independent and smaller commercial strip retail offerings provide one element of retail space within the Lorton market. Neighborhood-serving retail in community strip commercial shopping centers include the following competitive offerings:

1. **Gunston Plaza**, originally built in 1989, has 184,000 square feet and is well occupied with an estimated 4,000 square feet available (a 2.2-percent vacancy rate). The shopping center received major renovations in 2011 and continues to upgrade facades and signage as necessary. Food Lion, its primary anchor store, and other key tenants, including Auto Zone Parts, International House of Pancakes, United States Post Office and Gold's Gym, enjoy the benefits of the highly trafficked Route 1 – Richmond Highway (44,000 average daily trips) and secondary visibility from both Armistead and Lorton roads. Recently marketed store vacancies indicate the modified gross rents (which exclude some expenses, such as electricity) range from \$25 to \$27 per square foot. The property incorporates two pad parcels, one for a McDonald's (owner and operator of the site) and another for Truist Bank (leased from the owner). In addition, Gunston Plaza includes a 19,500 square-foot office building also built in 1989.
2. **Lorton Marketplace**, located along Lorton Road south of the Lorton VRE station and one-half mile from the Amtrak Auto Train station, offers more than 127,900 square feet of space. Constructed in 2006, the shopping center was originally anchored by Shopper's Food, which will soon be replaced by Amazon Fresh. Amazon Fresh will occupy roughly 38,786 square feet of space. The remaining uses include fast casual restaurants (such as Tropical Smoothie Café), neighborhood services and convenience retail offerings such as optical and daycare. CoStar lists available space within the shopping center for \$28 to \$35 per square foot excluding utilities.
3. **Lorton Station**, located at the Lorton VRE station, includes Buildings B, D and E with roughly 33,000 square feet of retail space as well as three additional professional office buildings. The phased development began with construction in 2004 and completed build out in 2006. Signature restaurants anchor retail buildings B and D as endcap spaces along Lorton Station Boulevard. These modern



retail buildings and small green park offer modern retail space with ample rear parking and potential for sales to VRE commuters.

4. **Shoppes of Lorton Valley** is a 103,000 square-foot center built in 2003 along Ox Road west of I-95. Giant supermarket anchors the shopping center with a 55,800 square-foot store. Other tenants include neighborhood-serving businesses such as carry-out food, nail salons, and wireless communication outlets. Data indicate that asking rents range from \$27 to \$30 per square foot without utilities, taxes, insurance and janitorial. A fast casual restaurant replaced a financial institution in the most recent lease. The property has a low vacancy rate with less than 5,000 square feet available for lease.

In addition to these four competitive retail offerings, larger shopping centers and commercial strips along Richmond Highway and in Springfield provide competitive retail offerings outside the market area. Also not included are the major commissary, post exchange and food outlet at Fort Belvoir, which attract many of the area's active and retired military residents.

Retail Categories and Trends

In understanding retail markets, analysts break down retail goods into three main categories:

- **Neighborhood goods and services**, which serve the everyday needs of local residents, including grocery stores and drugstores;
- **Eating and drinking**, including both fast food and sit-down restaurants and bars; and
- **Shoppers goods**, the types of goods sold in department stores that customers prefer to compare among different stores before buying – general merchandise, apparel and accessories, furniture and home furnishings, and other goods (also known as GAFO). Where does entertainment fall into this?

Neighborhood goods and services stores and most local restaurants tend to attract customers from within a 5- to 10-minute distance, while shopping malls and other shoppers goods nodes may bring customers from a 15- to 20-minute distance or even further. Eating and drinking establishments draw customers from vastly different distances based on the orientation and character.

Lorton's retailers serve primarily the neighborhood goods and services and eating and drinking segments with very little shoppers goods offerings. This reflects the extreme competition offered by other larger centers.



It is also worth considering future retail needs in light of emerging trends and technologies. The national retail landscape has shifted significantly over the past decade with the major disruptions to the marketplace from e-commerce and other new shopping avenues outside traditional bricks-and-mortar businesses. Lorton retailers and shopping centers continue to adapt. E-commerce, which represented 17 percent of worldwide retail sales in 2020 and nearly 16 percent of the total U.S. retail sales, experienced a significant increase fueled by the Covid-19 pandemic. Its share dropped down to 14 percent at the end of the third quarter 2021 as shoppers were once again returning to stores⁴. However, e-commerce will likely continue to expand again as delivery networks develop and delivery options improve, exerting competitive pressures on most retailers.

This shift in consumer spending poses a question about the future and purpose of brick-and-mortar locations. Consumers are drawn by the convenience and variety offered by online shopping, spending less time at brick-and-mortar retailers. This trend has reinforced the critical importance of providing unique in-store experiences to drive traffic and improve profitability. The hybrid model of business, also known as omni-channel retail, leverages brick-and-mortar stores with e-commerce and has shown success as the future of retail.

With omni-channel retailing, the role of the physical store is changing; it is becoming an interface for online businesses to engage with customers and provide a consumer experience and social environment to their shoppers, an aspect of retail that is critically important for Millennial and Generation Z consumers. Brick-and-mortar storefronts serve many functions for omni-channel retailers (i.e., clicks-to-bricks). They function as a point of sale, but also as a showroom for viewing and trying out select merchandise; pick-up point for products purchased online; drop-off point for returns of products purchased online or in stores; opportunities to provide additional services; a source of marketing; and an opportunity for brand engagement. The key ingredient is the critical balance between the efficiency of online with the engagement of offline. Though underway before Covid-19, the pandemic has forced more businesses to pivot and provide a omni-channel approach to sales in order to survive.

Recent announcements about several major national chains closing as a result of these retail shifts continue the contraction that began more than five years ago. Primarily these retail closures represent stores in the shoppers goods category (e.g., Bed, Bath & Beyond, and JC Penney) and may consist of the partial closure of individual stores or elimination of the entire retail operation. Overall, the national retail closures data improved over the

⁴ United Nations Conference on Trade and Development, March 15, 2021, “How COVID-19 triggered the digital and e-commerce turning point”, <https://unctad.org/news/how-covid-19-triggered-digital-and-e-commerce-turningpoint>



course of 2021 as more than half of grocery-based retail chains and fast-casual restaurants chains expanded their operations.⁵ These retail expansions include Aldi, Trader Joe's, Burlington Stores, Dollar Tree and Family Dollar.

As autonomous/driverless vehicles are developed, experts expect that their first deployment will occur in distribution. By eliminating the cost of drivers, distribution will become less expensive, giving e-commerce further impetus. Using driverless cars, robots and drones for deliveries will reduce the most burdensome costs of the “last mile” between store and customer’s home. As deliveries become more convenient, less costly and faster, shoppers will be less likely to visit a brick-and-mortar store and retailing will continue to change significantly. Stores are likely to shrink in size and number. The retailers that persist will be those that offer an experience more than simply a transaction, such as restaurants, entertainment and retailers that allow shoppers to try out goods before ordering them delivered to their homes.

Retail Demand

The comparison between the dollars spent by Lorton area residents for retail goods and the sales reported by those retailers is the key measure of unmet demand that could be used to draw new retailers to the area. Trade areas represent the geographic areas from which a large majority of local shoppers live (typically 80 percent of total sales). For each retail category, shopping patterns and competition vary the appropriate trade area as shoppers will not travel as far for everyday groceries as they will for apparel or to shop in certain stores that provide a greater variety of goods or particular cost advantages (e.g., Costco). For each trade area the expenditures of residents compared to the sales of local stores, as estimated by Esri, offer the basis for estimating future retail demand.

The difference between expenditures and sales represents “sales outflow” (market area residents’ dollars spent outside of the market area) or “sales inflow” where store sales exceed residents’ expenditures by attracting dollars from shoppers who live outside the market area. The data show gaps across most retail categories with many shoppers leaving the Lorton area to travel to nearby competitive retail clusters.

It should be noted that the following section of data relies on pre-pandemic information, 2017 to establish a baseline of spending and sales data. To eliminate false conclusions and misinformation, this baseline offers the best ability to forecast future demand for retail space and not consider the dynamic shift resulting from the pandemic’s impact on the retail environment. These extreme shifts seen during the course of 2020 and again during 2021

⁵ Rafter, Dan, RE Journal, November 5, 2021 “Surprise: Retailers Opening More Stores in 2021, <https://rejournal.com/surprise-retailers-opening-more-stores-in-2021-than-they-are-closing/>



reflect an altered condition not likely to be replicated. The demand conclusions reflect these baseline data but project conclusions for the future of the Lorton marketplace.

Shoppers Goods Potential

Because most shoppers like to compare their options when shopping for clothes and furnishings, they tend to seek out major shopping malls and other retail clusters for their shoppers goods purchases. Lorton Census Tract Area⁶ shoppers can travel a short time and distance beyond the trade area to Potomac Mills, Springfield Town Center or the Stonebridge at Potomac Town Center. Travel patterns and congestion were factored into these conclusions and used during multiple drive-time analysis mapping exercises. These competitive offerings range from standard malls, larger regional and super regional malls, and lifestyle or power centers with the ability to attract residents from a broader trade area. These shoppers goods clusters with major roadway access to larger population centres have much better locations than in the Lorton Census Tract Area from which to meet the needs of Lorton Census Tract Area residents.

For those shoppers goods retailers located within the Lorton Census Tract Area, the estimated \$241 million in sales compared with \$536 million in expenditures by area residents, as described in Table 5. This outflow of roughly \$295 million could suggest the opportunity for additional retail space in specific locations within Lorton. However, existing regional malls, shopping centers and new retail planned nearer to the new residential development will preempt much of this demand, shrinking the overall retail potential. In addition, a portion of these outflow sales reflect military households spending outside the private market at the Fort Belvoir post exchange.

Retail Category	Resident Spending	Existing Sales	Unmet Potential
General Merchandise Stores	\$261,727,000	\$144,445,000	\$117,282,000
Clothing & Clothing Accessories Stores	\$76,731,000	\$13,611,000	\$63,120,000
Furniture & Home Furnishings Stores	\$56,464,000	\$26,209,000	\$30,255,000
Electronics & Appliance Stores	\$48,090,700	\$31,843,000	\$16,247,700
Sporting Goods, Hobby, Book & Music Stores	\$40,550,000	\$4,518,000	\$36,032,000
Miscellaneous Store Retailers	\$52,018,000	\$20,161,000	\$31,857,000
Total	\$535,580,700	\$240,787,000	\$294,793,700

Note: Reflects demand and sales within the Lorton ZIP 22079, with baseline spending and sales data circa 2017.
Source: ESRI, Retail Marketplace Profile 2021; Partners for Economic Solutions, 2021.

⁶ See Map 2 with boundaries and definition by Census Tract.

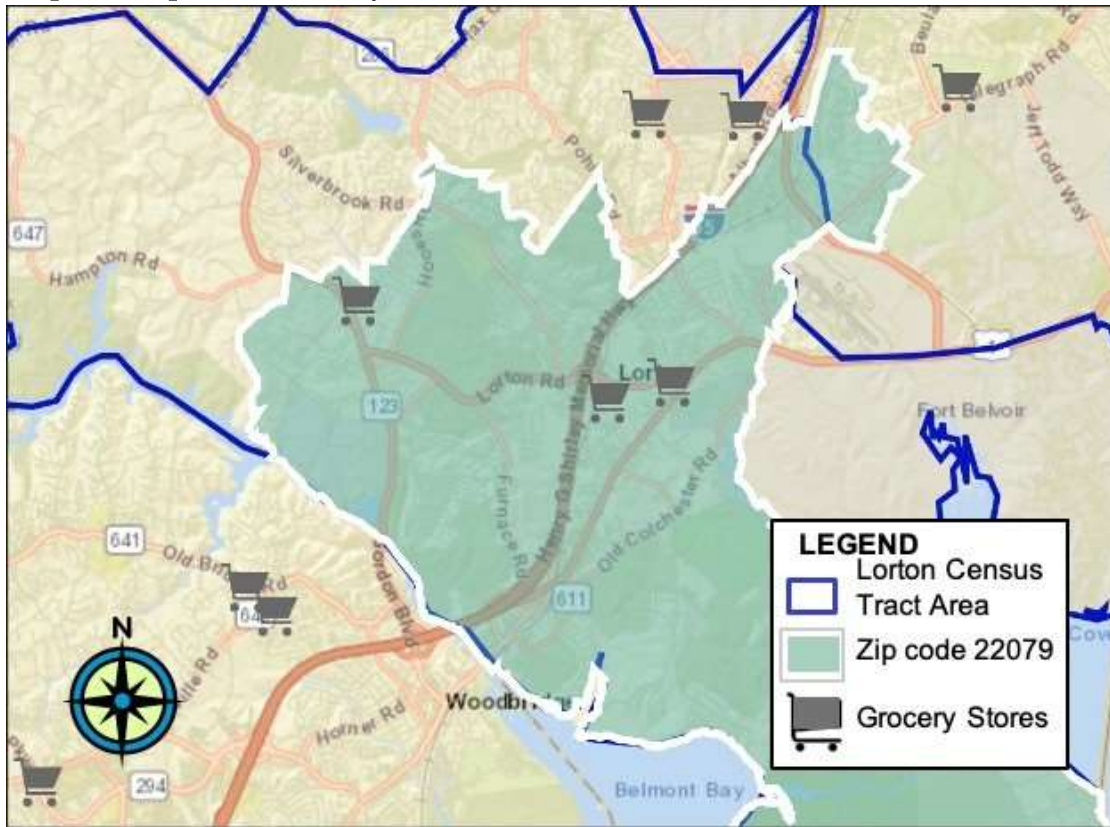
Neighborhood Goods & Services

For neighborhood goods and services, customers tend to travel to the most convenient retail stores offering access to groceries, pharmacies and services such as nail salons. The most appropriate trade area for these types of retailers consists of the area within the Lorton ZIP 22079 (Map 4). Area households spent roughly \$153.7 million annually, and area stores captured \$200.3 million in annual sales, as shown in Table 4.

Retail Category	Resident Spending	Existing Sales	Unmet Potential
Grocery Stores	\$106,906,000	\$134,695,000	-\$27,789,000
Specialty Food Stores	\$3,368,000	\$2,081,000	\$1,287,000
Beer, Wine & Liquor Stores	\$5,491,000	\$46,146,000	-\$40,655,000
Health & Personal Care Stores	\$37,945,000	\$17,328,000	\$20,617,000
Total	\$153,710,000	\$200,250,000	-\$46,540,000
Note: Reflects demand and sales within the Lorton ZIP 22079, with baseline spending and sales data circa 2017.			
Source: ESRI, Retail Marketplace Profile, 2021; Partners for Economic Solutions, 2021.			

Table 4 indicates that Lorton grocery stores and beer, wine and liquor stores were pulling in customers from beyond the trade area with an estimated inflow of \$68.4 million. More than half of the residents' health and personal care store (e.g., drugstore) expenditures were made outside the Lorton trade area. Map 6 shows the competitive grocery store offerings within the trade area and in close proximity to the trade area.

Map 6. Competitive Grocery Stores



Eating & Drinking

For eating and drinking establishments, the competitive environment creates a cluster of restaurants that attracts spending. The retail sales and expenditure data in the 22079 ZIP code area showed sales of \$29.6 million as compared with residents' expenditures of \$74.1 million. The outflow of residents' eating and drinking dollars to other locations includes money spent for lunch near work, money spent on vacation, and money spent in other regional activity centers, such as Stonebridge. Given the appeal of a cluster of restaurants, a greater concentration of restaurants and cafes in an activated, walkable environment could increase somewhat Lorton's capture of these eating and drinking dollars.

Table 5. Eating & Drinking Spending and Sales

Retail Category	Resident Spending	Existing Sales	Unmet Potential
Food Services & Drinking Places	\$74,090,000	\$29,632,000	\$44,458,000
Special Food Services	\$1,055,000	\$349,000	\$706,000
Drinking Places - Alcoholic Beverages	\$944,000	\$0	\$944,000
Restaurants/ Other Eating Places	\$72,091,000	\$29,283,000	\$42,808,000
Total	\$74,090,000	\$29,632,000	\$44,458,000
Note: Reflects demand and sales within the Lorton ZIP 22079, with baseline spending and sales data circa 2017.			
Source: ESRI, Retail Marketplace Profile, 2021; Partners for Economic Solutions, 2021.			

Retail Demand Conclusions

Successful restaurants generally draw workers (often referred to as “daytime population” and visitors for lunches and depend on area residents and some workers for dinners and weekends. Lorton is disadvantaged by the limited amount of daytime population in either basic businesses or general office space, particularly in walking distance of existing restaurants. The auto-oriented nature of the Lorton environment and nearby Fort Belvoir means that the buildings are relatively spread out. Without more retail demand from area workers or visitors, the average daytime population customer base does not support additional restaurants. The limited walk-in market is supplemented by auto-dependent customers. Most of the area business parks’ employees drive to work and could eat in Lorton restaurants, but once they get in their cars, the eatery choices available to them within a five-minute drive expand exponentially. Furthermore, with the anticipated shift of many of these employees to working remotely two out of five weekdays, work-based lunch trips will be more limited. Home-based workers can make up for some of that lost demand, but they tend to eat out for lunch less often. Passangers drawn to the Lorton Auto Train station do create the potential for more mid-day eating and drinking customers as they wait for their cars to be loaded. The nearby eating and drinking establishments at the Lorton Marketplace property with the near-term addition of Panera Bread offer good food alternatives. Improved pedestrian connections and wayfinding could increase that business somewhat.

Regarding VRE commuters, experience at other commuter rail stations suggests that only a small share of transit riders would eat at a station area restaurant. The bulk of the restaurant’s business would need to come from local area residents, which include most of the VRE commuters passing through the station. While unmet demand does exist, the existing retailers will capture much of it. Attracting additional restaurants to sites adjacent to the Lorton VRE station to meet some of the local demand will require superior locations with easy access and visibility from Lorton Station Road. The VRE station area



currently offers a quality walkable environment with a sense of place that would allow new restaurants to offer something different from the existing competition. The addition of new residential units in and near the station area could provide new walk-in customers to support existing and new eateries.

Within the broader area, the outflow of residents' retail dollars suggests potential support for an additional drugstore but the presence of Fort Belvoir with its commissary and medical clinics for the military will continue to constrain the opportunity to attract more sales to Lorton. The activity generated by VRE commuters is not enough to support a significant base of retail space. The Lorton area offers little or no opportunity for any significant shoppers goods retail establishments due to the extensive number of options provided by nearby competition. The area is served by a diversity of stores offering a wide variety of choices.

The strongest opportunity for expanded Lorton Study Area retail lies in experiential retail offerings. These retailers offer an engaging experience with tactile, immersive and shareable convenience. The priority of experience retail is engagement more than just simply sales, competing on experience rather than products. As a result, retail footprints are shrinking in size with store design being a critical component in providing a great experience. There are several factors which elevate an experience including human-centered design, social connection and a sense of community, being welcoming and engaging, and providing diversity of experience. Today's experience economy requires more than just creating a good experience; the experience has to be great, and this is accomplished by engaging people's emotions in order to keep them coming back.

Another popular retail trend to activate and diversify the suburban retail landscape involves pop-up shops and mobile trucks (e.g., food, fashion and flower trucks). These types of impromptu and less formal retail arrangements help to merge different types of retail for instant cross-shopping and help to create an interest by curating experiences for shoppers. These changing or stand-alone kiosks, carts or motorized vehicles present a unique opportunity to draw customers and activate space with events or programming.

Finally, restaurants from fast casual to more formal fare use multi-faceted approaches to increase revenue and remain relevant. The consumer demand (especially Millennials) for takeout and delivery from restaurants continues to grow in popularity with 58 percent of Millennials incorporating restaurant-prepared main dishes or desserts into meals. Millennial spending on food and beverage incorporates delivery, mobile ordering and take-out options for convenience, but they spend the most on food away from home (i.e., dining at restaurants). In general, restaurants cannot compete on dine-in business alone and need to offer delivery, pick-up and prepackaged meals to meet growing consumer demand. Takeout is not limited to fast food anymore; fast casual and even finer dining establishments are



embracing this consumer demand and offering takeout and delivery options, “food that travels” has been said to be the future. Restaurants have always been a place for socializing. The demand for dining out as a social event and cultural experience has been reinforced by the Covid-19 pandemic. Restaurants with great dining experiences (especially outdoors) have drawn the customers.

Niche Retail Opportunities

E-commerce has spurred growth in Lorton’s healthy industrial and warehouse/distribution uses and access to excellent distribution channels over the last decade. Niche retailers interested in both retail and warehouse or production space seek opportunities for establishing new operations in these light industrial enclaves.

Often craft distilleries and breweries find existing industrial properties and warehouse spaces as ideal candidates for repurposing and creating both a retail operation (tasting room and/or light fare) in conjunction with production space in communities across the nation. Industrial buildings may meet the space requirements in terms of floor load capacity, utility infrastructure, loading docks and parking. In the craft beer industry, artisanal developers work collaboratively and share resources and customer base more easily than do traditional retailers. This collegial environment becomes one of many factors in the site selection process.

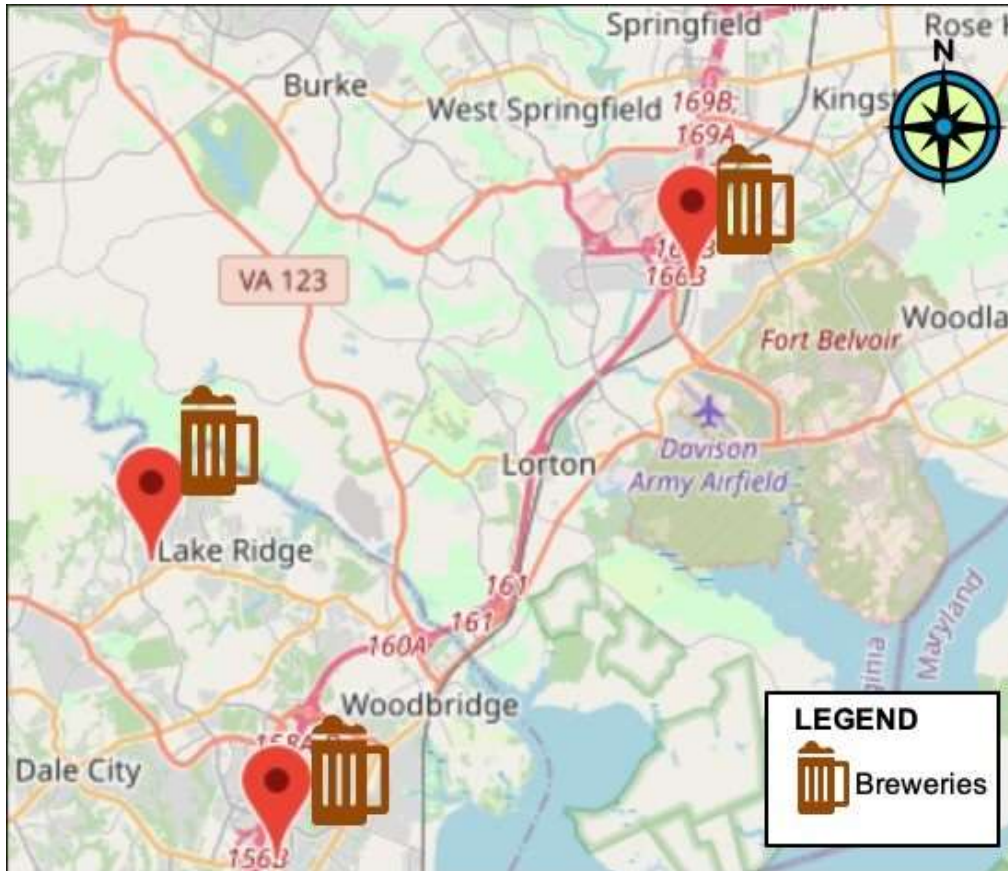
In Virginia the recent change in state laws that restricted the sale of distilled spirits allows for more local makers of small-batch liquor. Virginia’s Department of Alcoholic Beverage Control (ABC) had previously held that craft distilleries could serve at most four half-ounce tastings of their product and were required to pay a larger share of sales to the ABC agency compared to craft beer and wine sellers. As of 2020, approximately 62 craft distilleries operated in Virginia with more than 10 additional distilleries pending approval.

A review of existing brewery and distillery options identifies only a few craft brewery and distillery operations in this section of southern Fairfax County and northern Prince William County. Fair Winds Brewing Company represents the only brewery in Lorton. Water’s End Brewery in Lake Ridge and Brew Republic Bierwerks in Woodbridge are the two closest breweries (Map 7). Located near Fredericksburg, A Smith Bowman Distillery offers not only production but tours of the distillery operations, monthly events and a full menu to extend its reach.

Lorton could seek to add a brewery and/or distillery to its offerings if suitable buildings are available. Co-location with other eateries and entertainment would be particularly attractive. This may be an alternative for the Lorton Reformatory site with close proximity to the arts enclave at the Lorton Workhouse. The Workhouse offers studio and gallery space for an estimated 100 professional and emerging artists. The addition of a brewery

and restaurant at the Workhouse would not preclude one from locating elsewhere in Lorton, closer to Richmond Highway, but the supply of suitable buildings available at supportable rents is more limited.

Map 7. Local Craft Breweries



As mentioned previous the shifting retail landscape prior to the pandemic included a growth in restaurant spending by consumers, as restaurant sales surpassed grocery store sales in 2015. Prior to the pandemic the farm to table restaurant segment gained momentum with a focus on quality, local products offering more sustainable options for customers. Certainly, as consumer confidence grows, households increase their patronage of restaurants but as the pandemic impacted the safety of indoor dining consumer patterns shifted dramatically in 2020. Data from the Bureau of Labor Statistics showed a climb in restaurant and takeout spending increased with an increase of 1.9 percent from 2018 to 2019. In 2020, spending on food away from home declined by 32.6 percent, reflecting stay-at-home mandates and the lack of consumer confidence for indoor dining experiences. Spending on food away from home, which accounted for 54.4 percent of total food expenditures in 2018 up from 50.1 percent in 2009 (data from the Bureau of Labor Statistics, Food Expenditure Services) declined to account for only 32 percent in 2020.



Gains in takeout and delivery restaurant spending, estimated at 63 percent of US food away from home spending, spurred by the adaption of digital delivery services helped savvy restaurants remain viable. However the restaurant industry as a whole continues to suffer from supply chain shortages for ingredients such as corn, as well as labor shortages during the pandemic.

New restaurants entering into the marketplace would need to compete with those existing restaurants and manage a smaller profit-margin as digital delivery services charge high fees to restaurants. A general rule of thumb for restaurants is that only one out of every five restaurants succeeds over the long term, so turnover is common and should be expected in the Lorton marketplace due to the competitive cluster of restaurants outside the Study Area.

Office Market Conditions

The office market assessment includes general office market insights and review of neighborhood-serving offices in less traditional spaces. Much of the general market office space exists in commercial buildings along major thoroughfares and in traditional business parks with access and visibility along I-95 or Route 1/Richmond Highway. Within the Lorton area, as defined by CoStar and shown in Map 8, office space accounts for approximately 424,000 square feet in 18 properties with a reasonably healthy 93-percent occupancy rate. The Lorton area's office spaces rent for \$26 to \$28 per square foot full-service on average. In comparison, the Fairfax County office spaces rent for an average of \$32 to \$34 per square foot full-service.

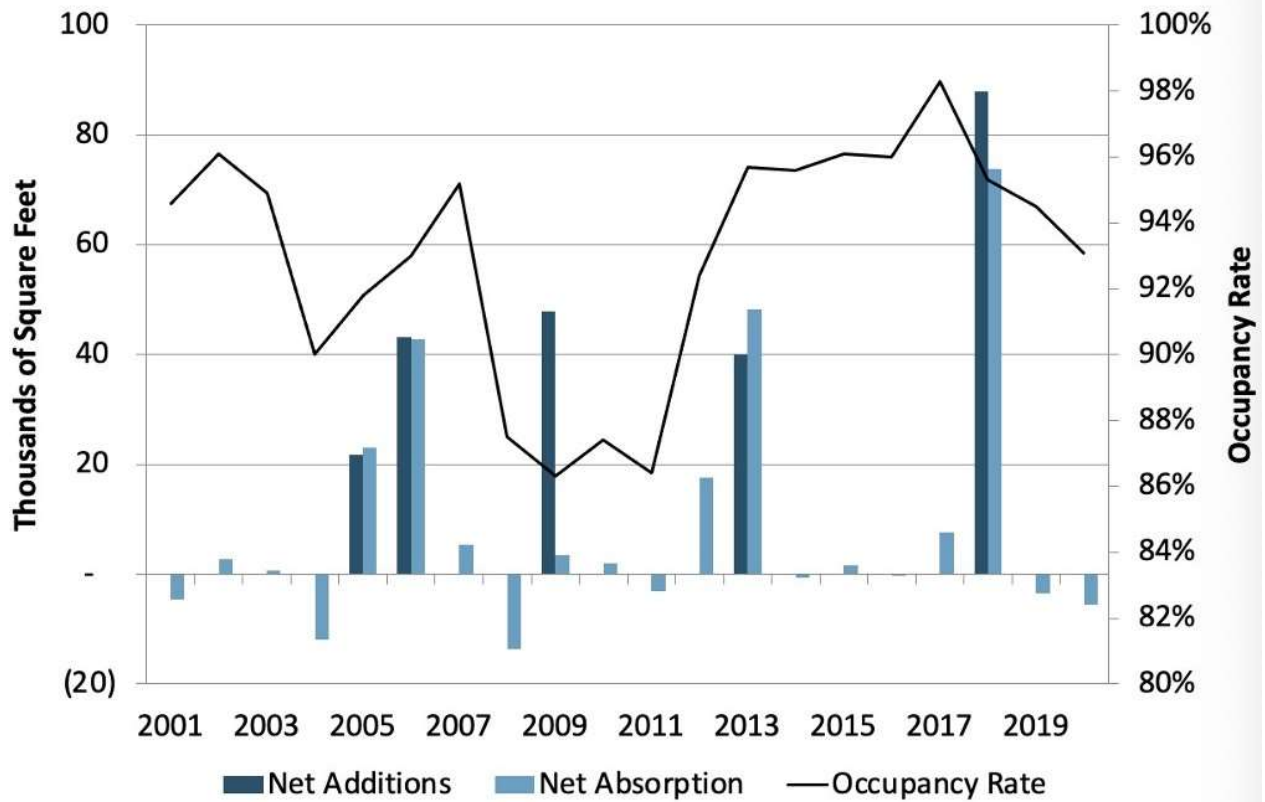
Map 8. Lorton Office Market



Lorton's office market grew slowly over the last decade with the addition of two buildings with 127,900 square feet, as shown in Figure 9, according to data provided by CoStar. This

slow growth allowed existing buildings to reduce vacancies, which peaked at 13.6 percent in 2012 and dropped to 1.6 percent in 2019 (See Appendix Table A13). Today, there is limited new office product in the pipeline, and the majority of the office activity clusters around medical service and neighborhood-service businesses (e.g., accountants) in high traffic areas. The Belvoir Business Center, located across Telegraph Road from Fort Belvoir and near the National Geospatial Agency’s new headquarters, plans to expand with the construction of a 97,581 square-foot building for occupancy in 2023.

Figure 8. Lorton Office Conditions, 2000-2020



Almost half of the office buildings (48 percent) are classified as Class A, 30 percent are Class B, and 22 percent are Class C. Classing of commercial space helps to properly evaluate existing supply by differentiating buildings by physical condition and operating performance. Class A represents those buildings that command the highest rents, and Class C represents older properties in average condition or secondary locations receiving lower than average rents. Interestingly, a review of vacancy data by class of space reveals that both Class A and Class C space in Lorton remains at full occupancy. It is likely many of these buildings are single-tenant users or owner-occupied and built for the specific user.

The Lorton office market region remains reliant on neighborhood medical office and defense-related firms and government contractors, to a lesser extent, as a large amount of



space exists at Fort Belvoir. It should be noted that employment and absorption of space related to military operations tend to be less predictable as they relate to federal defense priorities. The U.S. inventory of co-working space doubled from 2017 to 2020 reaching 86 million square feet. With only 27 million square feet of U.S. co-working space in 2018 the pandemic impacted these trends⁷. These types of co-working spaces provide distraction free options for remote workers sharing homes with other remote workers. These more affordable satellite locations outside the major employment concentrations of downtown Washington DC, Arlington, Alexandria and northern Fairfax County offer options for workers who would rather not commute every day to the main offices. Lorton Station includes a significant co-working facility.

Current employment forecasts from MWCOG reflect steady anticipated employment growth, adding a total of 12,742 jobs (27.0 percent) from 2020 to 2045 with 57 percent of the new jobs being created in the Newington CDP, as shown in Table 7. Employment growth in office-generating industries (Information; Finance and Insurance; Professional, Scientific and Technical Services; Health Care and Social Assistance; Other Services; and Government) is forecast at 25.2 percent by 2045 with the addition of 7,389 jobs in these sectors. Lorton CDP employment in office-using industries is forecast to grow by 22.3 percent or 1,077 jobs in 2045.

Geography	Year						2020 2045 Change	
	2020	2025	2030	2035	2040	2045	Number	Percent
Census-Defined Place¹								
Lorton	4,839	4,939	5,186	5,566	5,766	5,916	1,077	22.3%
Laurel Hill	212	378	378	378	378	378	166	78.3%
Crosspointe	320	320	320	320	320	320	-	0.0%
Mason Neck	54	54	54	54	54	54	-	0.0%
Newington	8,360	9,690	12,951	12,951	12,951	12,951	4,591	54.9%
Newington Forest	295	295	295	1,109	1,109	1,109	814	275.9%
Lorton Census tract Area total								
16 Census Tracts	29,335	32,486	35,994	36,374	36,574	36,724	7,389	25.2%
Note: ¹ Approximate totals based on the boundaries of the Traffic Analysis Zones used for the transportation model forecasts.								
Source: Round 9.2 Model, Metropolitan Washington Council of Governments, 2021; Partners for Economic Solutions, 2021.								

Office Demand Conclusions

The potential for office development in Lorton must be considered within the context of the regional office market. Office markets rarely consist of one type of office space; rather, distinct users create space needs, which vary greatly in character and construction type, impacting rents and location. As noted earlier, industries that use office space most heavily

⁷ Jones Lang LaSalle, Colliers, Cushman & Wakefield and Yardi Matrix, all real estate data research firms.



include Information; Finance and Insurance; Professional, Scientific and Technical Services; Health Care and Social Assistance; Other Services; and Government. Typically, the first three are most important for the general office market occupancy.

The initial economic and demographic outlook highlighted the potential for limited office based on only neighborhood-serving offices, supported primarily by local residents. Past military growth resulted in new space added at Fort Belvoir rather than to outlying properties. Several parcels of land are zoned for office development and actively marketed as shovel-ready with the ability to accommodate federal secure-campus requirements, and their owners continue to seek tenants for a built-to-suit alternative. Historical trends for office occupancy along with direct information from area brokers and office developers helped provide insight into the amount of demand anticipated in the short- and long-term.

While the market remains stable, there is no indication of unmet demand outside the base for large-scale speculative office development in the Lorton Study Area. Smaller buildings may be supported from time to time as the employment base expands.

Light Production Market Conditions

In southern Fairfax County industrial space can be described as production, distribution and repair (PDR) uses, including a variety of important business and municipal uses that support day-to-day living. Flexible space categorized as light production, maker, and industrial space blurs the line between office and industrial land uses. Historically, industrial properties lined the railroad and aligned with major truck travel routes include Route 1 (Richmond Highway) and Interstate 270. Over time much of Rockville's industrial space in the northern and eastern section of the city has been reclaimed for housing, leaving public and private sector industrial spaces primarily in the southern section. Flex space is a single-story structure with a combination of office, warehouse and/or showroom space designed for flexibility to meet the tenants' needs. It is typically equipped with truck docks to facilitate loading. The flex/office market does not provide Class A office space but rather offers lower rents, easy access and surface parking.

Recent trends in co-working space point to new opportunities in low-cost suburban industrial warehouse properties. Lower-cost co-working space in flex office and industrial buildings continues to gain traction in response to the boost in remote working associated with the pandemic. A new start-up, Codi, allows hosts to rent out commercial spaces to workers in need for co-working opportunities in a similar fashion to Airbnb. Saltbox—an Atlanta based company—divides up light industrial warehouse space and pairs it with appropriate co-working amenities. Saltbox focuses on physical goods businesses offered month-to-month memberships for conference rooms, photography studio, private 'warehouse suites' with loading docks, freight equipment and access to on-demand labor.



Saltbox expanded to Dallas, Denver, Seattle and Los Angeles based on demand from small to mid-size light industrial co-working users.

Lorton sits within the Newington Industrial Submarket, as defined by CoStar. Total industrial and flex inventory consists of 11.8 million square feet of space clustered along Interstate-95 with an overall vacancy rate of 7.4 percent in 2021. The industrial inventory of 7.1 million square feet has a very low vacancy rate of 2.9 percent with rents at close to \$14 full-service as compared with \$12 countywide. The vacancy rate declined from a high of 11.2 percent in 2013 with the addition of a new 120,620 square feet of industrial space brought new space into the market. Flex space in the Newington submarket (Map 11) consists of 4.7 million square feet when a vacancy rate of 14.1 percent as of the end of the third quarter 2021. In general flex space while less expensive than traditional office has higher rents than industrial; within the Newington submarket CoStar reports \$16.56 gross rent per square foot.

Within the focus area around Lorton Road and Lorton Station Boulevard, five industrial properties offer 169,000 square feet of space. These properties are fully occupied including two single-tenant buildings and one self-storage facility.

Map 8. Newington Industrial Submarket



Light Production Demand Conclusions

Lorton’s opportunities for additional light production are exceedingly limited. The value of the properties in the Study Area generally precludes use for single-story industrial space. The existing users fully occupy these spaces.



It should be noted that demand will exist for light industrial and production space in most markets at rents well below current market rents. While this is a reflect of demand, the highest and best use for the property owners seeking the the best return on their investment.

The future of maker space requires not only an appropriate space but also the synergistic environment currently evident at the Workhouse. Future maker space will first locate in readily available options outside of the focus area. The retail space in the Lorton focus area performs with low vacancies and higher rents than most maker uses could afford.

IV. Residential Market Analysis

The following analysis of residential market potentials reviews existing housing characteristics and construction trends. Internet research and direct interviews with residential real estate professionals (including brokers/agents, housing builders and developers) about current housing market characteristics augment information from the 2010 Census, American Community Survey (2015-2019), Esri (national data provider) and the U.S. Department of Housing and Urban Development to characterize current, local housing trends.

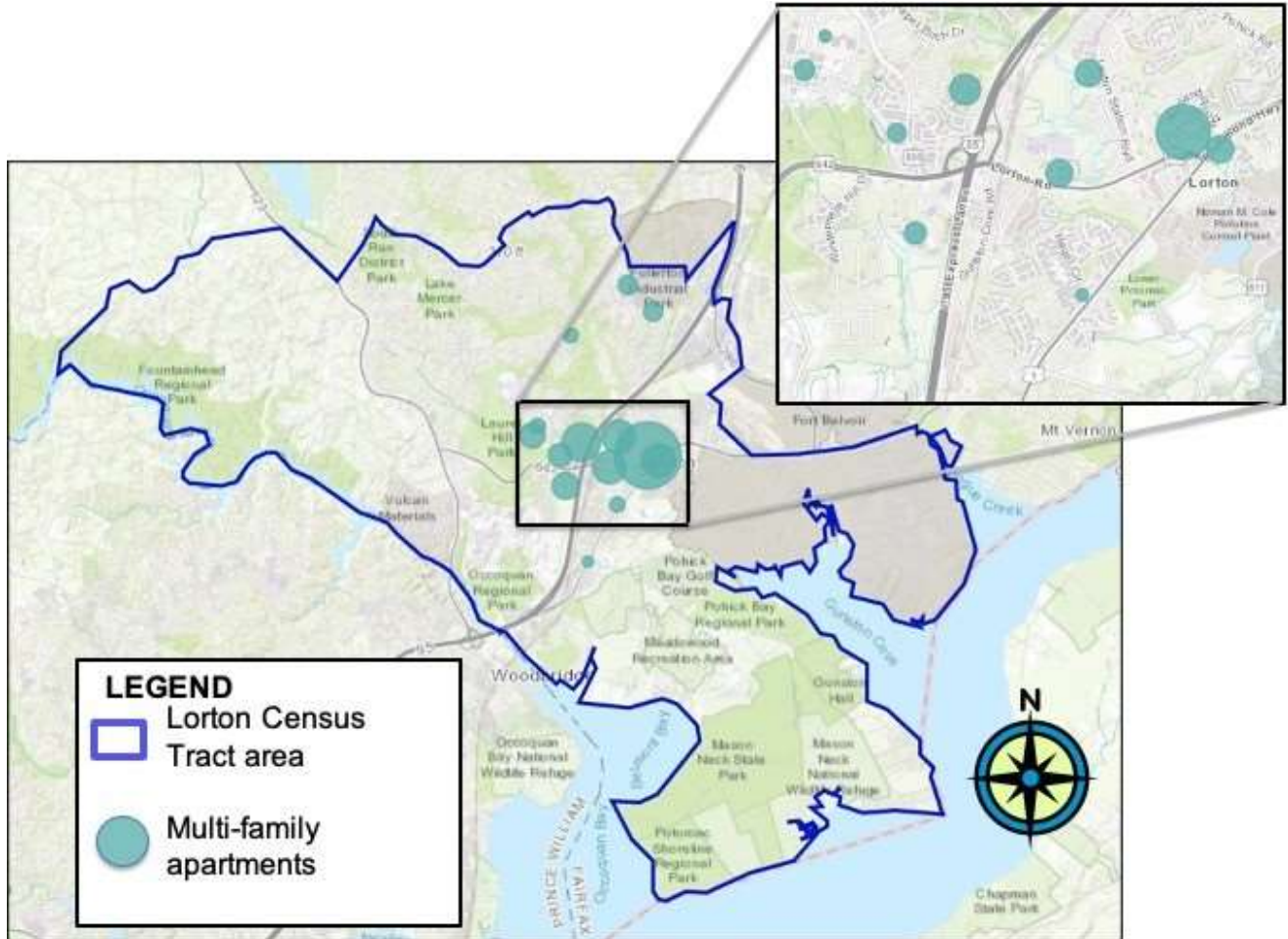
The market area is characterized by a mix of single-family owner-occupied and rental housing; a scattering of multi-family garden apartment buildings, including four rent-restricted affordable housing developments; and recent townhouse and single-family infill development along major arterials and in newly developed subdivisions on the former Lorton Prison redevelopment parcels.

Rental Conditions

The area immediately surrounding the Lorton communities has a mix of apartment buildings along major transportation arterials and townhomes in the surrounding neighborhoods. The existing multi-family apartment stock within the market area consists of Class A and Class B properties with apartments in good to excellent condition. The majority of these properties are garden-style walk-ups, with a few offering mid-rise structures. Private home rentals in this suburban community tend to focus on military housing needs, but such rentals do not represent a large share of the rental supply.

PES surveyed the private apartment complexes and other multi-unit rental properties within the Lorton area. As shown in Map 10, the pattern for residential rental development followed the major road arterials as development occurred over time. The circles on the map vary in size based on the number of units in each apartment complex. (For a complete list, see Appendix Table A14.)

Map 10. Lorton Area Multi-Family Apartments



Lorton Area Rental Housing

Many of the Lorton apartment buildings are located within a half-mile of the Lorton VRE station or along major thoroughfares. In total, there are 13 existing rental apartment buildings within the one-half mile of the VRE station, providing a total of 2,145 units. The majority of the units are market-rate apartments with four subsidized apartment buildings

that have rent restrictions or age- and income-restricted options. The apartment buildings range in size from small complexes of 50 units up to 608 units for mid-rise buildings.

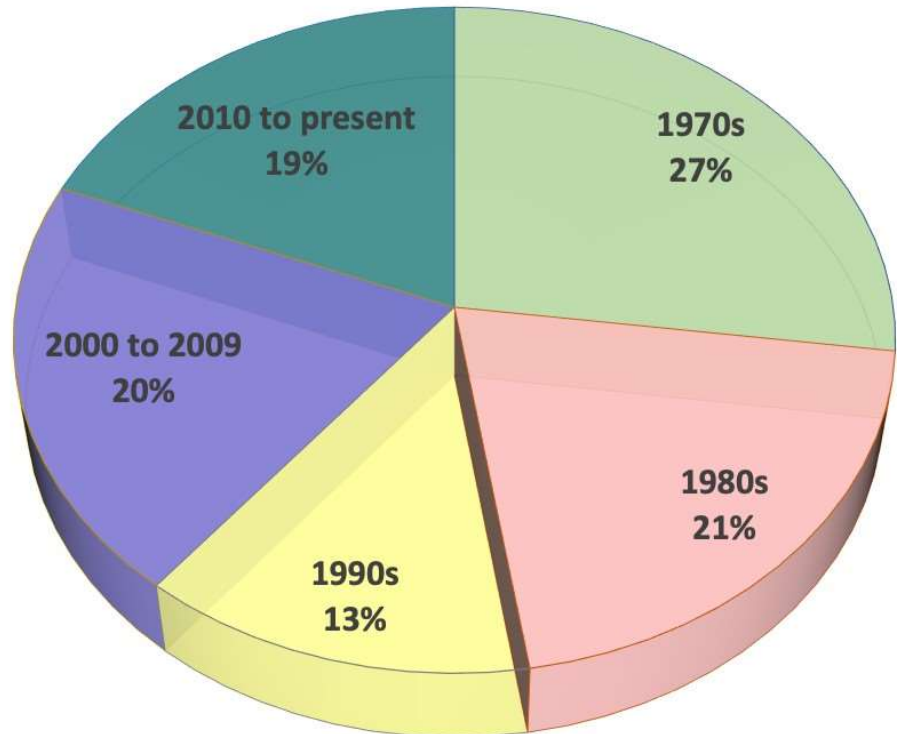
Originally a suburban residential community with minimal multi-family development, the area's apartment development began in the 1970s with roughly 48 percent of the units built prior to 1990, as shown in Figure 8.

During the 1990s only two apartment buildings with 13 percent of the units were constructed.

From 2000 to 2009, another two apartment projects – The Fields at Lorton Station and The Cosmopolitan at Lorton Station – added 499 units to the apartment supply.

Finally, the first Class A apartment buildings include Liberty Crest Apartments, opening in 2018 with 165 new units, and the Quarters with, six units at the former Lorton Reformatory site.

Figure 8. Lorton Apartments by Year Built



During the 1990s only two apartment buildings with 13 percent of the units were constructed. From 2000 to 2009, another two apartment projects – The Fields at Lorton Station and The Cosmopolitan at Lorton Station – added 499 units to the apartment supply.

Based on a review of CoStar data, these 13 complexes rent one-bedroom units for \$1,540 to \$1,900 and two-bedroom units for \$2,080 to \$2,350 monthly. There are more three- and four-bedroom apartments than in most markets, reflecting the demand from military personnel. Pricing for these three-bedroom units ranges from \$1,940 to \$2,560 with rents for the few four-bedroom units reaching in excess of \$2,550, comparable to monthly mortgage amounts for similarly sized for-sale products. It should be noted that many of these apartment buildings offer several amenities to support these families, including health club, yoga room, large pool with lap lane, and outdoor grilling area.

Occupancy information available from CoStar suggests that the Lorton market-rate buildings keep vacancies low with an average occupancy rate of 95.7 percent as of third quarter 2021. Typically, a 95-percent occupancy rate is considered a healthy balance between supply and demand.

Table 7. Multifamily Housing Trends, 2010-2020

Year	Total Buildings	Units					Asking Rent		
		Total	Average Square Feet	Percent Vacant	Net Absorption	Deliveries	Per Unit	Per Square Foot	
2010	10	1,674	989	3.3%	19	-	\$1,293	\$1.28	
2011	11	1,974	1,011	9.2%	174	300	\$1,320	\$1.31	
2012	11	1,974	1,011	5.5%	74	-	\$1,369	\$1.36	
2013	11	1,974	1,011	4.7%	15	-	\$1,388	\$1.38	
2014	11	1,974	1,011	5.3%	-	13	-	\$1,425	\$1.42
2015	11	1,974	1,011	3.7%	34	-	\$1,501	\$1.49	
2016	11	1,974	1,011	4.6%	-	20	-	\$1,525	\$1.51
2017	12	2,139	1,005	8.1%	87	165	\$1,566	\$1.56	
2018	12	2,139	1,005	5.1%	67	-	\$1,631	\$1.62	
2019	13	2,145	1,006	4.7%	13	6	\$1,656	\$1.65	
2020	13	2,145	1,006	7.9%	-	68	-	\$1,766	\$1.76
2021	13	2,145	1,006	5.1%	58	-	\$1,990	\$1.98	
2010-2020 Change									
Number	3	471	17				\$473	\$0.48	
Percent	23.1%	22.0%	1.7%	-1.3%			26.8%	27.3%	

Source: CoStar, 2021; Partners for Economic Solutions, 2021.

The rental housing market does not include military housing units at Fort Belvoir. The current on-base housing consists of 15 villages with varying access depending on the military rank and family size. In general, the villages offer homes ranging in size from three to five bedrooms with two to three bathrooms. Townhouse style units with communal parking lots are available on post for military personnel.

For-Sale Residential

Data from Real Estate Business Information and Multiple Listing Service data (reported by Redfin.com) show for-sale real estate activity with 337 residential units sold in the Lorton Census Tract Area over the last 12 months. These sales include a fairly even split amongst for-sale products with 48.9 percent townhouses and 40.3 percent single-family detached houses sold over the course of the year. Somewhat surprising in this suburban market, 10.7 percent of the sales were condominiums; typically suburban markets do not have as much condominium sales activity. These sales represented a wide diversity in price, size, lot size and amenities.

Map 11. Residential For-Sale ZIP 22079 Boundary Map



A closer review of the number of bedrooms shows that the majority of the townhouses include three bedrooms with an average sales price of \$457,380. Newly constructed townhouses, built after 2005, sold for an average price of \$644,700, showing price premiums for new construction and larger unit size.

Fifty-eight percent of the single-family homes sold in the last year (October 2020 to October 2021) had four bedrooms, with an average sale price of \$768,600 within the 22079 ZIP code, the boundaries of which are shown in Map 11. This compared to larger single-family homes with five or more bedrooms that had an average sales prices of \$929,700. In Fairfax County the average sales price of \$599,000 shows the diversity in for-sale housing products throughout the county.

The condominium sales were predominantly in Gunston Corner, built in the 1990s near the intersection of Silverbrook Road and Lorton Road, and Spring Hill Condominiums built in 2012, located further north along Silverbrook Road near Laurel Crest Road. The Gunston Corner condominium project sales included two-bedroom units ranging in size from 951 to



1,256 square feet with an average sales price of \$282,853 for the last year of sales. The more modern Spring Hill condominium units sold for an average of \$441,629 for larger condominiums with roughly 1,640 square feet per unit.

Overall economic conditions in the national and regional marketplace are impacting local development and real estate investment. The majority of new residential projects consist of previously planned greenfield projects in suburban neighborhoods. PES profiled existing competitive for-sale residential development in terms of type, year built, size, occupancy and sale prices. New and proposed competition was identified through plan submissions to Fairfax County as well as interviews.

A few recently completed and proposed developments located in the immediate area surrounding Lorton provide valuable insight into for-sale conditions.

1. **Giles Overlook**— This recently completed project developed by Lennar on 38 acres of residential land located along Sanger Street, consists of 52 homes with a density of 1.36 dwelling units per acre in the Lorton CDP. The land was rezoned from R-1 to R-5 to allow the 52 units of detached housing. Unlike much of the single-family residential development in this southern section of Fairfax County, this development offers units with four bedrooms and 4.5 bathrooms in 2,616 square feet with a few options up to 5,758 square feet. The homes benefit from double-hung drywall and a large noise barrier as the development backs up to Interstate 95. A review of recent sales activity indicates the units sold for \$330 to \$340 per square foot, remaining below the \$1 million mark.
2. **Indian Springs Farm**— This boutique single-family development in Mason Neck built in 2019 – 2020 offers eight luxury single-family homes on lots of one acre or more. The eight homes sold out quickly with sales prices of \$314 to \$325 per square foot or \$980,000 to \$1,368,193 for the four- to five-bedroom homes. These homes feature large lots with the potential to customize layout and interior finishes. Data from the county suggest the total build out may result in 30 new single-family homes.
3. **Christopher Land**— Currently under review for the rezoning application is an infill development project in the Lorton CDP on 6.34-acres of land south of Lorton Road, which is proposing roughly 30 new single-family homes. The 6.34 acres with PDH-5 zoning allows for a slightly more intense single-family development. These single-family attached townhomes will have a proposed density of 4.72 dwelling units per acre. The proposed townhomes will offer two dedicated garage spaces and two additional parking spaces in the driveway.



Residential Demand

In general, demand for new residential development relates to the projected growth in households and turnover among existing households. Demand for housing also reflects the dynamics of the regional economy, considering both the jobs available that provide a sufficient wage or salary for area residents and the available housing stock.

There are many factors involved in the decision to purchase a home. Although monetary considerations are typically primary, physical and social factors also play a determining role. Neighborhood conditions, proximity to retail and services, community amenities, religious institutions, schools, public transit options and highway access are among the most influential factors. Additions to both the for-sale and rental housing stock, as well as continued investment in quality schools, attract a variety of market segments based on personal housing preferences.

The Lorton communities provide an excellent location south of the nation's capital and near to the Quantico/Fredericksburg job center – with some pockets of growth in population and households expected to continue over the next 10 to 20 years. The demographic analysis indicates that the broader Lorton community has added roughly 112 households annually. The 2020 MWCOG forecasts call for the addition of just over 1,300 new households in the Lorton Census Tract Area by 2045, as shown in Table 1. Two-thirds of this projected household growth would occur in the Lorton CDP with the addition of more than 850 new households. Both Laurel Hill and Newington Forest CDPs would continue to add new households as well. Minimal change is expected in the Crosspointe, Mason Neck and Newington CDPs due to land constraints and zoning restrictions.

Currently, residential market conditions in the area reflect potential demand for further residential development but the availability of developable land constricts the market's ability to meet demand. The environmental protections based on Resource Protection Areas in the Fairfax County Comprehensive Plan recommend low-density development in the more suburban and rural sections of southern Fairfax County.

For-Sale Demand

The Lorton Census Tract Area could attract 800 new owner households from 2022 to 2042 at a pace of roughly 40 new households every year. However, the lack of available sites for single-family detached and attached units within this section of Southern Fairfax County may prevent much of the demand from being achieved. Dense style townhouse developments located in walkable mixed-use environments and/ or proximate to open space could compete for this new owner household demand. The market could support development of 250 new townhouses by 2032 and a total of 550 new townhouses by 2042.



Rental Housing Demand

Unfortunately, the historical trends for multi-family rental housing development in the area show few newly constructed rental projects able to meet the renter household demand. The multi-family rental market added only 471 new units from 2010 to 2020 with the introduction of three new rental developments. Assuming significant investment in the public infrastructure and placemaking, the Lorton communities could support another 700 rental units over the next 20 years. Given the variety of competition in other locations with more walkable, activated environments, these units would need to cluster within roughly one mile of the VRE Lorton station to be fully competitive. That would likely require replacement of parking lots with parking structures as well as significant investments to create a sense of place with a walkable environment, quality open spaces, and additional amenities such as public art and restaurants.



Appendix A. Tables





Table A1. Population and Household Trends, 2000-2021

	Lorton Census Tract Area ¹		Lorton CDP		Crosspointe CDP		Laurel Hill CDP	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Population								
2000	56,127		10,430		5,754		4,466	
2010	68,573		18,610		5,802		6,855	
2021	73,454		19,915		5,845		9,372	
2000-2021 Change	17,327	30.9%	9,485	90.9%	91	1.6%	4,906	109.9%
2000-2010 Change	12,446	22.2%	8,180	78.4%	48	0.8%	2,389	53.5%
2010-2021 Change	4,881	7.1%	1,305	7.0%	43	0.7%	2,517	36.7%
Households								
2000	17,890		3,896		1,654		824	
2010	22,639		6,422		1,784		2,259	
2021	23,873		6,626		1,804		2,964	
2000-2021 Change	5,983	33.4%	2,730	70.1%	150	9.1%	2,140	259.7%
2000-2010 Change	4,749	26.5%	2,526	64.8%	130	7.9%	1,435	174.2%
2010-2021 Change	1,234	5.5%	204	3.2%	20	1.1%	705	31.2%
	Mason Neck CDP		Newington CDP		Newington Forest CDP		Fairfax County	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Population								
2000	1,750		12,578		12,312		969,836	
2010	2,005		12,943		12,442		1,081,726	
2021	2,048		13,159		12,530		1,140,784	
2000-2021 Change	298	17.0%	581	4.6%	218	1.8%	170,948	17.6%
2000-2010 Change	255	14.6%	365	2.9%	130	1.1%	111,890	11.5%
2010-2021 Change	43	2.1%	216	1.7%	88	0.7%	59,058	5.5%
Households								
2000	694		4,246		4,131		350,752	
2010	746		4,347		4,247		391,627	
2021	747		4,424		4,291		412,745	
2000-2021 Change	53	7.6%	178	4.2%	160	3.9%	61,993	17.7%
2000-2010 Change	52	7.5%	101	2.4%	116	2.8%	40,875	11.7%
2010-2021 Change	1	0.1%	77	1.8%	44	1.0%	21,118	5.4%
Note: ¹ The Lorton Census Tract Area includes the following 16 Census Tracts: 4162, 4163, 4220, 4221.01, 4221.02, 4222.01, 4222.02, 4326, 4327.01, 4327.02, 4323, 4922.01, 4922.02, 4922.03, 4923, and 49.24.								
Source: Esri Community Profile, 2021; Partners for Economic Solutions, 2021.								



Table A2. Households by Size, 2019

	Lorton Census Tract Area ¹		Lorton CDP		Crosspointe CDP		Laurel Hill CDP	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Households by Size								
1 Person	3,659	15.9%	1,259	19.1%	112	6.4%	607	22.8%
2 People	7,021	30.5%	1,853	28.2%	652	37.2%	764	28.7%
3 People	4,731	20.5%	1,329	20.2%	322	18.4%	379	14.2%
4 People	4,360	18.9%	1,058	16.1%	424	24.2%	633	23.8%
5 People	1,992	8.6%	539	8.2%	139	7.9%	184	6.9%
6 People	791	3.4%	289	4.4%	58	3.3%	58	2.2%
7+ People	483	2.1%	249	3.8%	46	2.6%	40	1.5%
Total Households	23,037	100.0%	6,576	100.0%	1,753	100.0%	2,665	100.0%
Average Household Size								
2010	3.02		2.88		3.25		3.03	
2021	3.06		2.99		3.24		3.16	
	Mason Neck CDP		Newington CDP		Newington Forest CDP		Fairfax County	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Households by Size								
1 Person	187	24.8%	624	14.8%	721	17.3%	89,175	22.5%
2 People	275	36.4%	1,254	29.7%	1,219	29.3%	123,880	31.2%
3 People	123	16.3%	917	21.7%	912	21.9%	71,787	18.1%
4 People	100	13.2%	816	19.3%	864	20.8%	68,468	17.3%
5 People	35	4.6%	378	9.0%	304	7.3%	27,265	6.9%
6 People	26	3.4%	207	4.9%	110	2.6%	9,824	2.5%
7+ People	9	1.2%	22	0.5%	26	0.6%	6,102	1.5%
Total Households	755	100.0%	4,218	100.0%	4,156	100.0%	396,501	100.0%
Average Household Size								
2010	2.69		2.98		2.93		2.74	
2021	2.74		2.98		2.92		2.74	
Note: ¹ The Lorton Census Tract Area includes the following 16 Census Tracts: 4162, 4163, 4220, 4221.01, 4221.02, 4222.01, 4222.02, 4326, 4327.01, 4327.02, 4323, 4922.01, 4922.02, 4922.03, 4923, and 49.24.								
Source: 2010 U.S. Census; American Community Survey (2015-2019); Partners for Economic Solutions, 2021.								



Table A3. Population by Age, 2021

	Lorton Census Tract Area ¹		Lorton CDP		Crosspointe CDP		Laurel Hill CDP	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Population by Age								
0 to 19 years	21,063	28.7%	5,702	28.6%	1,628	27.9%	2,706	28.9%
20 to 24 years	3,827	5.2%	1,211	6.1%	236	4.0%	473	5.0%
25 to 34 years	9,509	12.9%	3,060	15.4%	393	6.7%	1,155	12.3%
35 to 44 years	10,204	13.9%	2,978	15.0%	586	10.0%	1,321	14.1%
45 to 54 years	10,056	13.7%	2,809	14.1%	1,114	19.1%	1,449	15.5%
55 to 64 years	9,957	13.6%	2,292	11.5%	1,197	20.5%	1,302	13.9%
65 to 74 years	6,158	8.4%	1,141	5.7%	527	9.0%	657	7.0%
75 to 84 years	1,997	2.7%	390	2.0%	126	2.2%	241	2.6%
85 years and over	683	0.9%	332	1.7%	35	0.6%	68	0.7%
Total	73,454	100.0%	19,915	100.0%	5,842	100.0%	9,372	100.0%
Median Age	37.2		35.0		45.8		37.5	
	Mason Neck CDP		Newington CDP		Newington Forest CDP		Fairfax County	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Population by Age								
0 to 19 years	444	21.7%	3,687	28.0%	3,285	26.2%	286,791	25.1%
20 to 24 years	66	3.2%	568	4.3%	671	5.4%	63,161	5.5%
25 to 34 years	153	7.5%	1,535	11.7%	1,675	13.4%	147,428	12.9%
35 to 44 years	209	10.2%	2,058	15.6%	1,803	14.4%	164,577	14.4%
45 to 54 years	286	14.0%	1,777	13.5%	1,715	13.7%	154,712	13.6%
55 to 64 years	383	18.7%	1,759	13.4%	1,772	14.1%	153,652	13.5%
65 to 74 years	348	17.0%	1,231	9.4%	1,207	9.6%	106,741	9.4%
75 to 84 years	126	6.2%	451	3.4%	346	2.8%	46,887	4.1%
85 years and over	33	1.6%	93	0.7%	57	0.5%	16,835	1.5%
Total	2,048	100.0%	13,159	100.0%	12,531	100.0%	1,140,784	100.0%
Median Age	50.8		38.6		38.3		39.3	
Note: ¹ The Lorton Census Tract Area includes the following 16 Census Tracts: 4162, 4163, 4220, 4221.01, 4221.02, 4222.01, 4222.02, 4326, 4327.01, 4327.02, 4323, 4922.01, 4922.02, 4922.03, 4923, and 49.24. Source: Esri Demographic and Income Profile, 2021; Partners for Economic Solutions, 2021.								



Table A4. Population by Age, 2010 2026

Age	Fairfax County					
	2010		2021		2026	
	Number	Percent	Number	Percent	Number	Percent
Population by Age						
0 to 19 Years	285,405	26.4%	286,791	25.1%	281,358	24.1%
20 to 24 Years	60,139	5.6%	63,161	5.5%	62,458	5.3%
25 to 34 Years	158,642	14.7%	147,428	12.9%	155,809	13.3%
35 to 44 Years	164,990	15.3%	164,577	14.4%	169,396	14.5%
45 to 54 Years	174,767	16.2%	154,712	13.6%	154,108	13.2%
55 to 64 Years	131,493	12.2%	153,652	13.5%	146,642	12.6%
65 to 74 Years	62,967	5.8%	106,741	9.4%	116,339	10.0%
75 to 84 Years	30,489	2.8%	46,887	4.1%	62,653	5.4%
85 Years and Over	12,834	1.2%	16,835	1.5%	19,405	1.7%
Total Population	1,081,726	100.0%	1,140,784	100.0%	1,168,168	100.0%
Median Age	37.3		39.3		40.1	

Source: Esri Demographic and Income Profile, 2021; Partners for Economic Solutions, 2021.

Table A5. Race and Ethnicity, 2010-2021

	Lorton Census Tract Area ¹				Lorton CDP			
	2010		2021		2010		2021	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Race and Ethnicity								
Caucasian	39,498	57.6%	37,608	51.2%	7,258	39.0%	6,672	33.5%
Black	11,795	17.2%	14,250	19.4%	5,564	29.9%	6,393	32.1%
Asian	10,697	15.6%	13,442	18.3%	3,387	18.2%	4,023	20.2%
Some other race	2,811	4.1%	3,232	4.4%	1,359	7.3%	1,553	7.8%
Two or more races	3,497	5.1%	4,628	6.3%	949	5.1%	1,196	6.0%
Total	68,573	99.6%	73,454	99.6%	18,610	99.5%	19,915	99.6%
Hispanic	8,229	12.0%	9,696	13.2%	3,108	16.7%	3,565	17.9%
	Crosspointe CDP				Laurel Hill CDP			
	2010		2021		2010		2021	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Race and Ethnicity								
Caucasian	4,537	78.2%	4,319	73.9%	2,797	40.8%	3,215	34.3%
Black	290	5.0%	333	5.7%	1,357	19.8%	2,090	22.3%
Asian	696	12.0%	12	0.2%	2,104	30.7%	3,149	33.6%
Some other race	87	1.5%	842	14.4%	151	2.2%	216	2.3%
Two or more races	174	3.0%	6	0.1%	418	6.1%	675	7.2%
Total	5,802	99.7%	5,845	94.3%	6,855	99.6%	9,373	99.7%
Hispanic	319	5.5%	321	5.5%	576	8.4%	834	8.9%
	Mason Neck CDP				Newington CDP			
	2010		2021		2010		2021	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Race and Ethnicity								
Caucasian	1,800	89.8%	1,778	86.8%	7,598	58.7%	7,027	53.4%
Black	82	4.1%	109	5.3%	1,993	15.4%	2,250	17.1%
Asian	62	3.1%	2	0.1%	1,864	14.4%	2,158	16.4%
Some other race	12	0.6%	84	4.1%	686	5.3%	763	5.8%
Two or more races	40	2.0%	2	0.1%	738	5.7%	921	7.0%
Total	2,005	99.6%	2,048	96.4%	12,943	99.5%	13,159	99.7%
Hispanic	142	7.1%	145	7.1%	1,838	14.2%	2,040	15.5%
	Newington Forest CDP				Fairfax County			
	2010		2021		2010		2021	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Race and Ethnicity								
Caucasian	8,013	64.4%	7,305	58.3%	678,242	62.7%	650,247	57.0%
Black	1,394	11.2%	1,616	12.9%	99,519	9.2%	117,501	10.3%
Asian	1,817	14.6%	2,168	17.3%	189,302	17.5%	235,002	20.6%
Some other race	473	3.8%	539	4.3%	65,985	6.1%	76,433	6.7%
Two or more races	672	5.4%	840	6.7%	44,351	4.1%	58,181	5.1%
Total	12,442	99.4%	12,530	99.5%	1,081,726	99.6%	1,140,784	99.7%
Hispanic	1,655	13.3%	1,892	15.1%	168,749	15.6%	195,074	17.1%

Note: ¹ The Lorton Census Tract Area includes the following 16 Census Tracts: 4162, 4163, 4220, 4221.01, 4221.02, 4222.01, 4222.02, 4326, 4327.01, 4327.02, 4323, 4922.01, 4922.02, 4922.03, 4923, and 49.24.

Source: Esri Community Profile, 2021; Partners for Economic Solutions, 2021.



Table A6. Households by Tenure, 2000 2019

	Lorton Census Tract Area ¹		Lorton CDP		Crosspointe CDP		Laurel Hill CDP	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Tenure, 2000								
Owner	13,058	73.0%	2,098	53.9%	1,581	95.6%	607	73.7%
Renter	4,832	27.0%	1,798	46.1%	73	4.4%	217	26.3%
Tenure, 2010								
Owner	16,621	73.4%	3,696	57.6%	1,693	94.9%	1,924	85.2%
Renter	6,018	26.6%	2,726	42.4%	91	5.1%	335	14.8%
Tenure, 2019								
Owner	17,178	74.6%	3,919	59.6%	1,640	93.6%	2,087	78.3%
Renter	5,859	25.4%	2,657	40.4%	113	6.4%	578	21.7%
	Mason Neck CDP		Newington CDP		Newington Forest CDP		Fairfax County	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Tenure, 2000								
Owner	612	88.2%	3,348	78.9%	3,399	82.3%	248,847	70.9%
Renter	82	11.8%	898	21.1%	732	17.7%	101,905	29.1%
Tenure, 2010								
Owner	663	88.9%	3,518	80.9%	3,594	84.6%	272,233	69.5%
Renter	83	11.1%	829	19.1%	653	15.4%	119,394	30.5%
Tenure, 2019								
Owner	675	89.4%	3,485	82.6%	3,734	89.8%	269,528	68.0%
Renter	80	10.6%	733	17.4%	422	10.2%	126,973	32.0%

Note: ¹ The Lorton Census Tract Area includes the following 16 Census Tracts: 4162, 4163, 4220, 4221.01, 4221.02, 4222.01, 4222.02, 4326, 4327.01, 4327.02, 4323, 4922.01, 4922.02, 4922.03, 4923, and 49.24.

Source: U.S. Census 2000, 2010 and American Community Survey 2019; Partners for Economic Solutions, 2021.



Table A7. Households by Type, 2019

	Lorton Census Tract Area ¹		Lorton CDP		Crosspointe CDP		Laurel Hill CDP	
Household Type	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Family Households								
Family households	18,671	81%	4,981	76%	1,628	93%	1,977	74%
Married-couple family	15,495	67%	3,695	74%	1,518	87%	1,588	80%
Other families	3,176	14%	1,286	26%	110	6%	389	20%
Male householder, no wife present	682	3%	274	21%	20	1%	45	12%
Female householder, no husband present	2,424	11%	972	76%	90	5%	301	77%
Non-Family Households								
Nonfamily households	4,366	19%	1,595	24%	125	7%	688	26%
Householder living alone	3,659	16%	1,259	79%	112	6%	607	88%
Householder not living alone	707	3%	336	27%	13	1%	81	13%
Total Households	23,037	100%	6,576	100%	1,753	100%	2,665	100%
	Mason Neck CDP		Newington CDP		Newington Forest CDP		Fairfax County	
Household Type	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Family Households								
Family households	564	75%	3,500	83%	3,325	80%	283,315	71%
Married-couple family	457	81%	2,874	82%	2,904	70%	231,274	58%
Other families	107	19%	626	18%	421	10%	52,041	13%
Male householder, no wife present	51	48%	131	21%	123	3%	18,705	5%
Female householder, no husband present	64	60%	500	80%	298	7%	36,152	9%
Non-Family Households								
Nonfamily households	191	25%	718	17%	831	20%	113,186	29%
Householder living alone	187	98%	624	87%	721	17%	89,175	22%
Householder not living alone	4	2%	94	15%	110	3%	24,011	6%
Total Households	755	100%	4,218	100%	4,156	100%	396,501	100%

Note: ¹ The Lorton Census Tract Area includes the following 16 Census Tracts: 4162, 4163, 4220, 4221.01, 4221.02, 4222.01, 4222.02, 4326, 4327.01, 4327.02, 4323, 4922.01, 4922.02, 4922.03, 4923, and 49.24.

Source: American Community Survey, 2015-2019; Partners for Economic Solutions, 2021.



Table A8. Households by Income, 2021

	Lorton Census Tract Area ¹		Lorton CDP		Crosspointe CDP		Laurel Hill CDP	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Household Income								
Less than \$25,000	1,126	4.7%	451	6.8%	20	1.1%	201	6.8%
\$25,000 to \$34,999	658	2.8%	272	4.1%	17	0.9%	86	2.9%
\$35,000 to \$49,999	1,648	6.9%	735	11.1%	5	0.3%	187	6.3%
\$50,000 to \$74,999	2,242	9.4%	623	9.4%	91	5.0%	364	12.3%
\$75,000 to \$99,999	2,634	11.0%	822	12.4%	87	4.8%	305	10.3%
\$100,000 to \$149,999	4,843	20.3%	1,570	23.7%	297	16.5%	539	18.2%
\$150,000 or more	10,722	44.9%	2,153	32.5%	1,288	71.4%	1,280	43.2%
Total	23,873	100.0%	6,626	100.0%	1,805	100.0%	2,963	100.0%
Median Household Income	\$133,474		\$109,113		\$200,001		\$126,651	
	Mason Neck CDP		Newington CDP		Newington Forest CDP		Fairfax County	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Household Income								
Less than \$25,000	55	7.4%	168	3.8%	146	3.4%	27,099	6.6%
\$25,000 to \$34,999	10	1.3%	75	1.7%	91	2.1%	14,086	3.4%
\$35,000 to \$49,999	54	7.2%	208	4.7%	218	5.1%	26,894	6.5%
\$50,000 to \$74,999	75	10.0%	380	8.6%	433	10.1%	43,391	10.5%
\$75,000 to \$99,999	36	4.8%	540	12.2%	569	13.3%	45,512	11.0%
\$100,000 to \$149,999	155	20.7%	964	21.8%	839	19.5%	80,262	19.4%
\$150,000 or more	363	48.6%	2,088	47.2%	1,996	46.5%	175,497	42.5%
Total	747	100.0%	4,424	100.0%	4,292	100.0%	412,741	100.0%
Median Household Income	\$144,757		\$140,693		\$137,952		\$125,986	

Note: ¹ The Lorton Census Tract Area includes the following 16 Census Tracts: 4162, 4163, 4220, 4221.01, 4221.02, 4222.01, 4222.02, 4326, 4327.01, 4327.02, 4323, 4922.01, 4922.02, 4922.03, 4923, and 49.24.

Source: Esri Community Profile, 2021; Partners for Economic Solutions, 2021.



Table A9. Employed Population Aged 16 and Over by Occupation, 2021

Industry/ Occupation	Lorton Census Tract Area ¹		Lorton CDP		Crosspointe CDP		Laurel Hill CDP	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Employed Residents by Occupation								
White Collar	28,327	77.3%	6,983	64.4%	2,598	86.0%	8,891	82.0%
Management, Business, Financial	9,454	25.8%	2,136	19.7%	940	31.1%	3,025	27.9%
Professional Services	12,533	34.2%	2,960	27.3%	1,139	37.7%	4,066	37.5%
Sales	2,638	7.2%	705	6.5%	236	7.8%	911	8.4%
Administrative Support	3,701	10.1%	1,182	10.9%	284	9.4%	900	8.3%
Services	4,507	12.3%	2,028	18.7%	272	9.0%	1,073	9.9%
Blue Collar	3,811	10.4%	1,832	16.9%	154	5.1%	878	8.1%
Farming, Forestry, Fishing	37	0.1%	33	0.3%	-	0.0%	-	0.0%
Construction, Extraction	989	2.7%	423	3.9%	42	1.4%	87	0.8%
Installation, Maintenance, Repair	623	1.7%	347	3.2%	60	2.0%	152	1.4%
Production	403	1.1%	98	0.9%	-	0.0%	206	1.9%
Transportation, Material Moving	1,759	4.8%	932	8.6%	51	1.7%	434	4.0%
Total	36,645	100.0%	10,843	100.0%	3,021	100.0%	4,521	100.0%
	Mason Neck CDP		Newington CDP		Newington Forest CDP		Fairfax County	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Employed Residents by Occupation								
White Collar	804	82.2%	5,513	79.3%	2,510	83.1%	474,071	78.6%
Management, Business, Financial	380	38.9%	1,808	26.0%	779	25.8%	164,055	27.2%
Professional Services	247	25.3%	2,628	37.8%	1,142	37.8%	218,338	36.2%
Sales	111	11.4%	285	4.1%	242	8.0%	42,220	7.0%
Administrative Support	66	6.7%	793	11.4%	344	11.4%	48,855	8.1%
Services	40	4.1%	925	13.3%	236	7.8%	68,758	11.4%
Blue Collar	134	13.7%	514	7.4%	275	9.1%	60,314	10.0%
Farming, Forestry, Fishing	-	0.0%	-	0.0%	6	0.2%	603	0.1%
Construction, Extraction	41	4.2%	111	1.6%	130	4.3%	21,110	3.5%
Installation, Maintenance, Repair	15	1.5%	21	0.3%	27	0.9%	8,444	1.4%
Production	36	3.7%	104	1.5%	36	1.2%	8,444	1.4%
Transportation, Material Moving	42	4.3%	278	4.0%	76	2.5%	22,316	3.7%
Total	978	100.0%	6,952	100.0%	7,002	100.0%	603,144	100.0%

Note: ¹ The Lorton Census Tract Area includes the following 16 Census Tracts: 4162, 4163, 4220, 4221.01, 4221.02, 4222.01, 4222.02, 4326, 4327.01, 4327.02, 4323, 4922.01, 4922.02, 4922.03, 4923, and 49.24.

Source: Esri, Community Profile, 2021; Partners for Economic Solutions, 2021.



Table A10. Means of Transportation to Work, 2019

Workers 16 and Over	Lorton Census Tract Area ¹		Lorton CDP		Crosspointe CDP		Laurel Hill CDP	
	Employed Residents	Percent	Employed Residents	Percent	Employed Residents	Percent	Employed Residents	Percent
Means of Transportation								
Car, Truck, or Van	30,596	83.3%	8,945	80.5%	2,558	87.1%	3,340	83.2%
Drove alone	26,597	72.4%	7,350	66.1%	2,273	77.4%	2,854	71.1%
Carpooled	3,999	10.9%	1,595	14.3%	285	9.7%	486	12.1%
Public Transportation (excluding taxicab)	3,381	9.2%	1,265	11.4%	94	3.2%	460	11.5%
Walked	472	1.3%	222	2.0%	59	2.0%	18	0.4%
Taxicab, Motorcycle, Bicycle, Other	120	0.3%	41	0.4%	25	0.9%	-	0.0%
Worked from Home	2,172	5.9%	643	5.8%	200	6.8%	196	4.9%
Total	36,741	100.0%	11,116	100.0%	2,936	100.0%	4,014	100.0%
Workers 16 and Over	Mason Neck CDP		Newington CDP		Newington Forest CDP		Fairfax County	
	Employed Residents	Percent	Employed Residents	Percent	Employed Residents	Percent	Employed Residents	Percent
Means of Transportation								
Car, Truck, or Van	847	87.7%	5,852	82.1%	5,606	86.6%	491,183	80.8%
Drove alone	806	83.4%	5,275	74.0%	5,019	77.5%	431,926	71.0%
Carpooled	41	4.2%	577	8.1%	587	9.1%	59,257	9.7%
Public Transportation (excluding taxicab)	50	5.2%	678	9.5%	510	7.9%	59,130	9.7%
Walked	10	1.0%	63	0.9%	11	0.2%	11,502	1.9%
Taxicab, Motorcycle, Bicycle, Other	7	0.7%	23	0.3%	24	0.4%	5,470	0.9%
Worked from Home	52	5.4%	513	7.2%	322	5.0%	40,831	6.7%
Total	966	100.0%	7,129	100.0%	6,473	100.0%	608,116	100.0%
Note: ¹ The Lorton Census Tract Area includes the following 16 Census Tracts: 4162, 4163, 4220, 4221.01, 4221.02, 4222.01, 4222.02, 4326, 4327.01, 4327.02, 4323, 4922.01, 4922.02, 4922.03, 4923, and 49.24.								
Source: Esri American Community Survey (ACS) 2015-2019; Partners for Economic Solutions, 2021.								



Table A11. Housing Units by Number of Units in Structure, 2019

	Lorton Census Tract Area ¹		Lorton CDP		Crosspointe CDP		Laurel Hill CDP	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Units in Structure								
1, Detached	12,825	53.2%	2,339	33.6%	1,753	100.0%	1,195	42.4%
1, Attached	8,186	34.0%	2,702	38.8%	-	0.0%	672	23.8%
2	53	0.2%	9	0.1%	-	0.0%	35	1.2%
3 to 4	145	0.6%	87	1.3%	-	0.0%	49	1.7%
5 to 9	544	2.3%	233	3.3%	-	0.0%	226	8.0%
10 to 19	1,220	5.1%	959	13.8%	-	0.0%	172	6.1%
20 to 49	364	1.5%	142	2.0%	-	0.0%	219	7.8%
50 or more	757	3.1%	487	7.0%	-	0.0%	253	9.0%
Mobile Home	10	0.0%	-	0.0%	-	0.0%	-	0.0%
Other	-	0.0%	-	0.0%	-	0.0%	-	0.0%
Total	24,104	100.0%	6,958	100.0%	1,753	100.0%	2,821	100.0%
	Mason Neck CDP		Newington CDP		Newington Forest CDP		Fairfax County	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Units in Structure								
1, Detached	798	98.5%	1,795	40.8%	2,251	52.8%	193,831	46.8%
1, Attached	12	1.5%	2,454	55.8%	1,994	46.8%	95,773	23.1%
2	-	0.0%	-	0.0%	-	0.0%	1,887	0.5%
3 to 4	-	0.0%	-	0.0%	-	0.0%	5,625	1.4%
5 to 9	-	0.0%	32	0.7%	16	0.4%	19,571	4.7%
10 to 19	-	0.0%	89	2.0%	-	0.0%	42,002	10.1%
20 to 49	-	0.0%	-	0.0%	-	0.0%	11,771	2.8%
50 or more	-	0.0%	17	0.4%	-	0.0%	41,097	9.9%
Mobile Home	-	0.0%	10	0.2%	-	0.0%	2,202	0.5%
Other	-	0.0%	-	0.0%	-	0.0%	126	0.0%
Total	810	100.0%	4,397	100.0%	4,261	100.0%	413,885	100.0%
Note: ¹ The Lorton Census Tract Area includes the following 16 Census Tracts: 4162, 4163, 4220, 4221.01, 4221.02, 4222.01, 4222.02, 4326, 4327.01, 4327.02, 4323, 4922.01, 4922.02, 4922.03, 4923, and 49.24.								
Source: Esri American Community Survey (ACS) 2015-2019; Partners for Economic Solutions, 2021.								



Table A12. Housing Units by Year Built, 2019

	Lorton Census Tract Area ¹		Lorton CDP		Crosspointe CDP		Laurel Hill CDP	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Year Built								
2010 or later	722	3.0%	160	2.3%	32	1.8%	341	4.9%
2000 to 2009	5,553	23.0%	2,639	37.9%	110	6.3%	1,348	19.4%
1990 to 1999	4,525	18.8%	1,122	16.1%	946	54.0%	902	13.0%
1980 to 1989	7,297	30.3%	1,372	19.7%	596	34.0%	101	1.5%
1970 to 1979	4,073	16.9%	955	13.7%	62	3.5%	70	1.0%
1960 to 1969	755	3.1%	416	6.0%	7	0.4%	-	0.0%
1950 to 1959	588	2.4%	143	2.1%	-	0.0%	-	0.0%
1940 to 1949	91	0.4%	4	0.1%	-	0.0%	16	0.2%
1939 or Earlier	500	2.1%	147	2.1%	-	0.0%	43	0.6%
Total	24,104	100.0%	6,958	100.0%	1,753	100.0%	2,821	40.5%
Median Year Built	1988		1994		1992		2002	
	Mason Neck CDP		Newington CDP		Newington Forest CDP		Fairfax County	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Year Built								
2010 or later	8	1.0%	17	0.4%	33	0.8%	17,045	4.1%
2000 to 2009	120	14.8%	203	4.6%	388	9.1%	45,446	11.0%
1990 to 1999	65	8.0%	453	10.3%	416	9.8%	64,550	15.6%
1980 to 1989	73	9.0%	1,723	39.2%	2,486	58.3%	96,179	23.2%
1970 to 1979	191	23.6%	1,794	40.8%	860	20.2%	85,429	20.6%
1960 to 1969	126	15.6%	127	2.9%	14	0.3%	56,410	13.6%
1950 to 1959	138	17.0%	42	1.0%	58	1.4%	36,636	8.9%
1940 to 1949	51	6.3%	24	0.5%	6	0.1%	8,291	2.0%
1939 or Earlier	38	4.7%	14	0.3%	-	0.0%	3,899	0.9%
Total	810	100.0%	4,397	100.0%	4,261	100.0%	413,885	100.0%
Median Year Built	1973		1981		1985		1982	

Note: ¹ The Lorton Census Tract Area includes the following 16 Census Tracts: 4162, 4163, 4220, 4221.01, 4221.02, 4222.01, 4222.02, 4326, 4327.01, 4327.02, 4323, 4922.01, 4922.02, 4922.03, 4923, and 49.24.

Source: Esri American Community Survey (ACS) 2015-2019; Partners for Economic Solutions, 2021.



Table A13. Lorton Office Market Trends, 2000-2020

Year	Total Square Feet	Vacant Square Feet	Occupied Square Feet	Occupancy Rate	Net Absorption	Average Rent ¹
Annual						
2000	182,885	5,290	177,595	97.1%	2,509	\$14.95
2001	182,885	7,060	173,031	94.6%	-4,564	\$13.97
2002	182,885	7,060	175,825	96.1%	2,794	\$13.69
2003	182,885	9,350	173,535	94.9%	660	\$13.32
2004	182,885	18,251	164,634	90.0%	-11,851	\$19.55
2005	204,570	16,870	187,700	91.8%	23,066	\$18.59
2006	247,738	17,300	230,438	93.0%	42,738	\$15.64
2007	247,738	11,996	235,742	95.2%	5,304	\$24.57
2008	247,738	30,971	216,767	87.5%	-13,584	\$22.30
2009	295,694	40,617	255,077	86.3%	3,488	\$17.76
2010	295,694	37,139	258,555	87.4%	1,978	\$15.43
2011	295,694	36,967	255,478	86.4%	-3,077	\$17.61
2012	295,694	22,518	273,176	92.4%	17,698	\$17.82
2013	335,685	14,311	321,374	95.7%	48,198	\$20.70
2014	335,685	14,895	320,790	95.6%	-584	\$20.01
2015	335,685	13,221	322,464	96.1%	1,674	\$19.00
2016	335,685	13,359	322,326	96.0%	-138	\$18.48
2017	335,685	5,435	329,876	98.3%	7,550	\$18.28
2018	423,685	20,041	403,644	95.3%	73,768	\$21.41
2019	423,685	23,488	400,197	94.5%	-3,447	\$19.78
2020	423,685	29,033	394,652	93.1%	-5,545	\$19.72
2000-2020 Change						
Amount	240,800	23,743	217,057	-4.0%		\$4.77
Percent	131.7%	448.8%	122.2%	-4.2%		31.9%

Note: ¹Full-service rent.

Sources: CoStar; Partners for Economic Solutions, 2021.



Table A14. Selected Lorton Comparable Rental Apartments

Development/Address	Floor Plans	Number of Units	Rental Rates	Square Feet	Rent per Square Foot	Occupancy Rate	Year Built	Comments
Belvoir Square	Studio	31	\$1,663	606	\$2.74	97%	2017	This green community offers a grill, package service, pet washing station, picnic area, recycling, storage space, gameroom, fitness center, elevator, dry cleaning service, clubhouse, business center and bicycle storage.
9142 Richmond Highway	1 Bedroom	173	\$1,891	832	\$2.27			
Fort Belvoir, VA 22060	2 Bedrooms	78	\$2,251	1,175	\$1.92			
		282						
Westminster Oaks	2 Bedrooms	30	\$1,670	824	\$2.03	N/A	1982	This apartment buildings offers online services, playground, public transportation, storage space, tenant controlled HVAC, vision Impaired access, multi-use room, laundry facility, bicycle storage, 24-hours access, hearing impaired access, etc.
82000 Beech Monarch Court	3 Bedrooms	20	\$1,800	881	\$2.04			
Springfield, VA 22153		50						
Greene Hills Estates	2 Bedrooms	44	\$1,845	1,108	\$1.67	N/A	1980	This property has basketball court, maintenance on site, playground, laundry facility and services.
7600 Creedmor Drive	3 Bedrooms	36	\$2,199	1,379	\$1.59			
	4 Bedrooms	20	\$2,553	1,607	\$1.59			
		100						
Woods of Fairfax I	1 Bedroom	203	\$1,670	765	\$2.18	92%	1979	The project has on-site maintenance, laundry facilities, fitness center and package service but the area offers car wash area, tennis court and volleyball court.
7630 Fairfield Woods Court	2 Bedrooms	205	\$1,900	1,000	\$1.90			
Lorton, VA 22079	3 Bedrooms	200	\$2,360	1,200	\$1.97			
		608						
The Fields at Lorton Station	2 Bedrooms	196	\$1,674	974	\$1.72	99%	2000	The property has a fitness center, grill, picnic area and playground.
7800-7804 Lewis Chapel Circle	3 Bedrooms	52	\$1,936	1,178	\$1.64			
Lorton, VA 22079		248						
The Cosmopolitan at Lorton Station	1 Bedroom	104	\$1,898	789	\$2.41	95%	2007	This property offers a business center, clubhouse, corporate suites, fitness center, furnished units and guest apartment, lounge, package service, sundeck, and breakfast / coffee concierge service.
9030 Lorton Station Boulevard	2 Bedrooms	147	\$2,337	1,135	\$2.06			
Lorton, VA 22079		251						
Vista Laurel Highlands	1 Bedroom	105	\$1,730	790	\$2.19	95%	2011	This modern property has a lounge, business center, clubhouse, on site maintenance, picnic area, pool, gameroom, grill, laundry facilities and storage space.
8141 McCauley Way	2 Bedrooms	168	\$2,226	1,221	\$1.82			
Lorton, VA 22079	3 Bedrooms	27	\$2,911	1,821	\$1.60			
		300						



Table A14. Selected Lorton Comparable Rental Apartments (Continued)

Development/Address	Floor Plans	Number of Units	Rental Rates	Square Feet	Rent per Square Foot	Occupancy Rate	Year Built	Comments
Sanger Place	2 Bedrooms	147	\$2,369	1,007	\$2.35	97%	1999	This property has a car wash area, clubhouse, fitness center, laundry facilities, pool, playground, property manager on site and package service.
9454 Orange Blossom Trail	3 Bedrooms	35	\$2,562	1,186	\$2.16			
Lorton, VA 22079		182						
Lindsey Hill Apartments	1 Bedroom	28	\$849	697	\$ 1.22	99%		This property offers a coffee bar, high ceilings, on historically preserved site, laundry facility, maintenance on site, 24 hour access, fitness center, grill, and tenant controlled HVAC. It's a senior apartment building with full access to Spring Hill Community amenities, including indoor swimming pool / spa.
8915 Pink Carnation Court	2 Bedrooms	28	\$953	869	\$ 1.10			
Lorton, VA 22079		56						
Liberty Crest Apartments	1 Bedroom	84	\$1,554	744	\$ 2.09	99%	2017	This 165 unit offers a pool, lounge, clubhouse, courtyard, fitness center, bicycle storage, and walking / biking trails.
9380 Quadrangle Street	2 Bedrooms	81	\$2,087	1,144	\$ 1.82			
Lorton, VA 22079		165						
The Landings II	Studio	12	\$1,211	410	\$ 2.95	100%	1964	This apartment buildings offers breakfast/coffee concierge, laundry service, package service, picnic area, playground, volleyball court, grill, furnished units, fitness center, and controlled access.
9190 Richmond Highway	1 Bedroom	42	\$1,283	650	\$ 1.97			
Fort Belvoir, VA 22060	2 Bedrooms	22	\$1,453	780	\$ 1.86			
		76						
Woodside	1 Bedroom	108	\$1,535	757	\$ 2.03	96%	1987	This apartment building has a business center, clubhouse, fitness center, laundry facilities, playground, furnished units, laundry facilities and on site maintenace.
7525 Woodside Lane	2 Bedrooms	130	\$1,731	1,022	\$ 1.69		2012	
	3 Bedrooms	14	\$1,959	1,195	\$ 1.64		Renov.	
		252						
The Quarters Apartments	1 Bedroom	6	\$2,260	1,372	\$ 1.65			
9071-9031 Power House Road		6						

Source: CoStar, 2021; Contacts with Property Managers; Partners for Economic Solutions, 2021.

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