

TABLE 6

Although a greater number of retail establishments opened their doors in the Maryland counties between 1954 and 1958 than elsewhere in the Metropolitan Area, Fairfax County experienced a greater percentage increase in total retail establishments than any other sub-area. Fairfax was also second only to Maryland in the actual number of new establishments. During the same four years, Falls Church and the District both lost retail establishments.

The number of retail establishments selling general merchandise and apparel decreased in Falls Church, Arlington County, and the District between 1954 and 1958. While Fairfax County showed the greatest percentage increase in retail establishments selling apparel, Maryland's increase in the number of stores selling apparel and general merchandise was the largest in the Metropolitan Area.

It should be noted that Maryland is not a serious competitor of Fairfax County in retail sales. It is more meaningful to compare it with the District. Any decrease in the District's sales represents a potential increase in Northern Virginia's sales.

NORTHERN VIRGINIA

MARYLAND (a)

DISTRICT OF COLUMBIA

S.F.S.A.

1980	2337	357	18.0	2408	2947	539	22.4	6728	6325	-403	-6.0	11,116	11,609	493	4.4
129	120	-9	-7.0	158	183	25	15.8	341	264	-77	-22.6	628	567	-61	-9.7
250	308	58	23.2	372	393	21	5.6	1201	1187	-14	-1.2	1823	1888	65	3.6
78	88	10	12.8	82	111	29	35.4	325	288	-37	-11.4	485	487	2	0.4
293	401	108	36.9	375	472	97	25.9	1358	1417	59	4.3	2026	2290	264	13.0
103	143	40	38.8	110	182	72	65.5	300	336	-24	-6.7	573	661	88	15.4
184	173	-11	-6.0	160	204	44	27.5	667	609	-58	-8.7	1011	986	-25	-2.5
268	367	99	36.9	335	421	86	25.7	422	443	21	5.0	1025	1231	206	20.1
92	128	36	39.1	127	156	29	22.8	206	221	15	7.3	425	505	80	18.8
391	382	-9	-2.3	455	518	63	13.8	1484	1253	-231	-15.6	2330	2153	-177	-7.6
78	80	2	2.6	88	128	40	45.5	195	137	-58	-29.7	361	345	-16	-4.4
114	147	33	28.9	146	179	33	22.6	169	170	1	0.6	429	496	67	15.6

TABLE 6

NUMBER OF RETAIL ESTABLISHMENTS IN THE WASHINGTON S.M.S.A., 1954 AND 1958

CATEGORY	FAIRFAX COUNTY				ARLINGTON COUNTY				ALEXANDRIA				FALLS CHURCH			
	1954	1958	Change		1954	1958	Change		1954	1958	Change		1954	1958	Change	
			Amt.	%			Amt.	%			Amt.	%			Amt.	%
Lumber	36	62	26	72.2	44	40	-4	-9.1	26	35	9	34.6	8	10	2	25.0
General Merchandise	24	32	8	33.3	28	24	-4	-14.3	19	20	1	5.3	7	4	-3	-42.9
Food	104	117	13	12.5	120	112	-8	-6.7	138	129	-9	-6.5	29	24	-5	-17.2
Automotive	22	30	8	36.4	35	48	13	37.1	27	43	16	59.3	8	7	-1	-12.5
Gas Stations	91	147	56	61.5	96	123	27	28.1	61	73	12	19.7	20	24	4	20.0
Apparel	17	37	20	117.6	90	51	-39	-43.3	54	66	12	22.2	23	19	-4	-17.4
Furniture	16	29	13	81.3	50	69	19	38.0	29	34	5	17.2	8	11	3	37.5
Eating	81	111	30	37.0	99	121	22	22.2	102	147	45	44.1	11	22	11	100.0
Drug	16	22	6	37.5	32	36	4	12.5	24	25	1	4.2	6	5	-1	-16.7
Other	54	87	33	61.1	102	128	26	25.5	69	75	6	8.7	25	18	-7	-28.0
Non-Retailing	32	45	13	40.6	39	56	17	43.6	33	17	-16	-48.5	25	2	-23	-92.0
TOTAL																
ESTABLISHMENTS	493	719	226	43.6	735	808	73	9.9	582	664	82	14.1	170	157	-13	-7.6

(a) Montgomery and Prince Georges Counties

TABLE 7

Most retail establishments in Fairfax County are small. The County ranked lowest in the Metropolitan Area in the value of retail sales per establishment in both 1954 and 1958. However, this gap was narrowed somewhat by the percentage increase in retail sales per establishment experienced during the 4-year period.

The tremendous expansion in retail sales per establishment in the apparel, general merchandise and furniture categories constitutes yet another indication of the new shopping centers' ability to divert non-convenience purchases from traditional shopping areas, i.e. the central business district of Washington, D. C.

<u>NORTHERN VIRGINIA</u>			<u>MARYLAND^(a)</u>			<u>DISTRICT OF COLUMBIA</u>			<u>S.M.S.A.</u>		
<u>1954</u>	<u>1958</u>	<u>% Change</u>	<u>1954</u>	<u>1958</u>	<u>% Change</u>	<u>1954</u>	<u>1958</u>	<u>% Change</u>	<u>1954</u>	<u>1958</u>	<u>% Change</u>
\$197.6	\$168.0	-15.0	\$255.5	\$197.6	-22.7	\$181.1	\$ 182.3	0.7	\$210.8	\$183.6	-12.9
597.3	838.7	40.4	380.2	453.2	19.2	915.3	1,269.5	38.7	716.1	866.7	21.0
287.3	353.0	22.9	285.5	399.7	40.0	151.4	177.3	17.1	200.4	262.0	30.7
285.8	686.9	-12.6	617.9	633.9	2.6	863.2	781.9	-9.4	773.2	712.1	-7.9
100.9	110.6	9.6	107.8	118.4	9.8	131.8	134.1	1.7	113.5	121.7	7.2
112.9	170.8	51.3	106.1	134.4	26.7	158.4	184.2	16.3	141.8	171.5	20.9
127.9	171.6	34.2	82.4	107.8	30.8	197.4	249.6	26.4	152.8	193.7	26.8
83.5	87.6	4.9	71.6	71.2	-0.6	81.8	83.3	1.8	80.2	81.5	1.6
239.9	321.2	33.9	223.8	282.2	26.1	173.9	201.7	16.0	193.0	241.7	25.2
97.9	119.6	22.2	76.6	96.9	26.5	130.6	145.7	11.6	118.3	131.3	11.0
28.7	48.6	69.3	80.6	78.5	-2.6	74.6	93.8	25.7	66.7	79.3	18.9
<u>\$195.0</u>	<u>\$220.5</u>	<u>13.1</u>	<u>\$176.6</u>	<u>\$208.2</u>	<u>17.9</u>	<u>\$218.7</u>	<u>\$194.3</u>	<u>-11.2</u>	<u>\$180.4</u>	<u>\$203.1</u>	<u>12.6</u>

RETAIL SALES PER ESTABLISHMENT IN THE WASHINGTON METROPOLITAN AREA
(In thousands of constant 1954 dollars)

CATEGORY	<u>FAIRFAX COUNTY</u>			<u>ARLINGTON COUNTY</u>			<u>ALEXANDRIA</u>			<u>FALLS CHURCH</u>		
	<u>1954</u>	<u>1958</u>	<u>% Change</u>	<u>1954</u>	<u>1958</u>	<u>% Change</u>	<u>1954</u>	<u>1958</u>	<u>% Change</u>	<u>1954</u>	<u>1958</u>	<u>% Change</u>
Lumber	\$165.9	\$137.2	-17.3	\$ 195.2	\$ 226.1	15.8	\$ 264.7	\$156.6	-40.8	\$136.4	\$166.3	21.9
General Merch.	61.8	394.3	538.0	1,240.6	1,822.3	46.9	494.2	519.8	5.2	140.6	87.8	-37.6
Food	153.5	316.2	106.0	365.7	397.3	8.6	281.5	301.3	7.0	470.0	602.7	28.2
Automotive	464.7	422.4	-9.1	830.3	889.2	7.1	1,038.4	638.8	-38.5	621.8	728.9	17.2
Gas Stations	81.0	109.8	35.6	107.1	113.2	5.7	113.1	109.4	- 3.3	124.0	105.8	-14.7
Apparel	68.2	246.9	262.0	131.5	193.7	47.3	115.3	119.0	3.2	67.8	140.8	107.7
Furniture	44.5	137.2	208.3	157.5	178.6	13.4	133.6	205.5	53.8	89.8	113.2	26.1
Eating	45.8	62.7	36.9	143.3	166.0	15.8	58.1	47.7	-17.9	58.9	48.7	-17.3
Drug	163.3	350.1	114.4	298.7	341.1	14.2	211.7	263.2	24.3	243.8	341.0	39.9
Other	73.1	88.4	20.9	104.5	140.3	34.3	111.5	108.8	-2.4	87.0)	172.9	n.a.
Non-Store Ret.	40.7	43.5	6.9	16.4	36.7	123.8	43.0	81.4	89.3	13.8)		
TOTAL	<u>\$110.5</u>	<u>\$173.0</u>	<u>56.6</u>	<u>\$246.7</u>	<u>\$282.8</u>	<u>14.6</u>	<u>\$206.7</u>	<u>\$193.0</u>	<u>-6.6</u>	<u>\$176.8</u>	<u>\$218.3</u>	<u>34.3</u>

(a) Montgomery and Prince Georges Counties

TABLE 8

Our projections show that by 1980 Fairfax County will have more than tripled its share of total retail sales in the Metropolitan Area. By 1980, Fairfax will account for more than one-half of all retail sales taking place in Northern Virginia, as compared with only one-quarter of Northern Virginia's sales in 1958.

It should be noted that in 1980, according to our projections, the Maryland counties will account for over 45 percent of the Metropolitan Area's retail sales, but that their rate of increase between 1958 and 1980 will be less than half that of Fairfax County's retail sales.

TABLE 3

PROJECTED RETAIL SALES FOR THE WASHINGTON S.M.S.A., 1958-1980
(In millions of constant 1954 dollars)

	<u>1958</u>		<u>1960</u>		<u>1970</u>		<u>1980</u>		<u>1958-1980</u>
	<u>Sales</u>	<u>% of SMSA</u>	<u>Sales</u>	<u>% of SMSA</u>	<u>Sales</u>	<u>% of SMSA</u>	<u>Sales</u>	<u>% of SMSA</u>	<u>% Increase in Sales</u>
Fairfax County	\$ 124	5.3	\$ 140	5.4	\$ 450	12.2	\$ 850	17.2	585.5
Arlington County	228	9.7))))			
Alexandria	128	5.4	455)	17.6	660)	18.0)	660	13.3	69.2
Falls Church	34	1.4))))			
Northern Virginia	515	21.8	595	23.0	1,110	30.2	1,510	30.5	193.2
Maryland ^(a)	614	26.0	800	30.9	1,375	37.4	2,250	45.5	266.4
D.C.	1,229	52.1	1,195	46.1	1,190	32.4	1,190	24.0	-3.2
S.M.S.A. ^(b)	2,358	100.0	2,590	100.0	3,675	100.0	4,950	100.0	109.9

(a) Montgomery and Prince Georges Counties.

(b) Components may not add to totals because of rounding error.

TABLE 9

We expect that food will continue to account for the greatest dollar volume of any single category of retail sales in Fairfax County; its share of the County's total retail sales will decrease, however, as the disposable income of the population continues to rise.

General merchandise sales, as projected, will move from seventh to fourth position when ranked by dollar volume, and its share of total retail sales in the County will almost quadruple.

TABLE 9

COMPOSITION OF RETAIL SALES IN FAIRFAX COUNTY, 1954-1980
(Ranked by dollar volume)

	<u>1954</u>			<u>1958</u>			<u>1970*</u>			<u>1980*</u>		
	<u>Rank</u>	<u>Dollar Sales (\$1,000)</u>	<u>%</u>	<u>Rank</u>	<u>Dollar Sales (\$1,000)</u>	<u>%</u>	<u>Rank</u>	<u>Dollar Sales (\$1,000)</u>	<u>%</u>	<u>Rank</u>	<u>Dollar Sales (\$1,000)</u>	<u>%</u>
Food	1	16.0	29.3	1	39.3	29.8	1	131.0	27.3	1	229.0	25.4
Automotive	2	10.2	18.8	3	13.4	10.2	3	54.3	11.3	2	110.0	12.2
Gas Stations	3	7.4	13.5	2	17.1	13.0	2	58.8	12.3	3	101.0	11.2
Lumber	4	6.0	11.0	6	9.0	6.8	5	34.3	7.1	5	67.8	7.5
Eating	5	3.7	6.8	8	7.4	5.6	7 ⁶	24.8	5.2	6	51.0	5.7
Drugs	6	2.6	4.8	7	8.2	6.2	8 ⁶	24.8	5.2	8	42.0	4.7
General Merchandise	7	1.5	2.7	4	13.4	10.2	4	47.5	9.9	4	93.3	10.4
Apparel	8	1.2	2.1	5	9.7	7.4	6	24.8	5.2	7	46.6	5.2
Furniture	9	0.7	1.3	9	4.2	3.2	9	13.1	2.7	9	25.4	2.8
Other		5.2	9.6		10.2	7.7		66.6	13.9		133.9	14.9
TOTAL		<u>54.5</u>	<u>100.0</u>		<u>131.9</u>	<u>100.0</u>		<u>480.0</u>	<u>100.0</u>		<u>900.0</u>	<u>100.0</u>

*1958 dollars

TABLES 10 AND 11

Approximately 23 million additional square feet of space will be required for retail activities by 1980 on the basis of our retail sales projections for Fairfax County.

It should be noted that the activities which are primarily shopping-center oriented (i.e. the categories of general merchandise, apparel, furniture, drugs, and "other") will account for almost seven million of the 23 million additional square feet required by 1980.

Assuming that one-half of all the sales in these categories will in fact take place in shopping centers to be built in Fairfax County, the estimated requirement of space needs between 1958 and 1980 is over 3 million square feet. The space need may exceed $4\frac{1}{2}$ million square feet if three-quarters of all general merchandise, apparel, furniture, drug, and "other" sales are "captured" by Fairfax County shopping centers.

TABLE 10

SPACE REQUIREMENTS FOR RETAIL ACTIVITIES IN FAIRFAX COUNTY, 1954-1980
(Based on estimated sales for selected categories)

<u>Category</u>	<u>Time Period</u>	<u>Increase in Sales (000's)</u>	<u>Gross Sales Per Sq.Ft.</u>	<u>Estimated Additional Sq. Ft. Requirements (in 000's)</u>
Lumber	1954-1958	\$ 3,054	\$15	203.6
	1958-1970	25,300		1,686.7
	1970-1980	33,500		2,233.3
General Merchandise	1954-1958	11,906	60	198.4
	1958-1970	34,100		568.3
	1970-1980	45,800		763.3
Food	1954-1958	23,294	100	232.9
	1958-1970	91,700		917.0
	1970-1980	98,000		980.0
Automotive	1954-1958	3,220	25	128.8
	1958-1970	40,900		1,636.0
	1970-1980	55,700		2,228.0
Gas Stations	1954-1958	9,748	20	487.4
	1958-1970	41,700		2,085.0
	1970-1980	42,200		2,110.0
Apparel	1954-1958	8,533	45	189.6
	1958-1970	15,100		335.6
	1970-1980	21,800		484.4
Furniture	1954-1958	3,509	42.5	82.6
	1958-1970	8,900		209.4
	1970-1980	12,300		289.4
Eating	1954-1958	3,675	50	73.5
	1958-1970	17,400		348.0
	1970-1980	26,200		524.0
Drugs	1954-1958	5,560	60	92.7
	1958-1970	16,600		276.7
	1970-1980	17,200		286.7
Other	1954-1958	4,992	40*	124.8
	1958-1970	56,400		1,410.0
	1970-1980	67,300		1,682.5
<u>Total</u>	1954-1958	77,491		1,814.3
	1958-1970	348,100		9,472.7
	1970-1980	420,000		11,581.6
<u>Total</u>	1954-1970			11,287.0
	1954-1980			22,868.6

*Estimated

TABLE 11

ESTIMATED INCREASE IN SQUARE FEET
OF RETAIL SPACE TO BE PROVIDED
IN FAIRFAX COUNTY

<u>Time</u> <u>Period</u>	<u>Square Feet of</u> <u>New Shopping-</u> <u>Center Oriented</u> <u>Retail Space</u>	<u>Percent Growth</u> <u>That Will</u> <u>Take Place in</u> <u>Shopping Centers</u>	<u>Estimate of Square</u> <u>Feet of Shopping-</u> <u>Center Space</u> <u>to Be Constructed</u>
1954-1958	688,100	51-76%	350,000-520,000
1958-1970	2,800,000	51-76	1,430,000-2,130,000
1970-1980	3,506,300	51-76	1,785,000-2,665,000

Note: Retail stores that are typically shopping-center oriented are included in the following categories: general merchandise, apparel, furniture, appliances, drugs, and "other".

TABLE 12

The percentage of disposable personal income spent on retail purchases is expected to decline only slightly between 1958 and 1980 (from 47 to 42 percent). This decrease reflects the relatively minor reallocation of personal expenditures as per capita incomes continue to rise.

The most important feature of Table 12 is the assumption, based on the experience of more mature suburban areas, that the share of all retail purchases made within the County will increase from 43 percent in 1958 to 75 percent in 1980. This trend represents the greatest opportunity for the further growth of shopping centers in Fairfax County.

TABLE 12

PERCENTAGE OF DISPOSABLE INCOME SPENT FOR RETAIL PURCHASES IN
FAIRFAX COUNTY, 1948-1970 (a)

<u>Year</u>	<u>Disposable Personal Income Per Capita</u>	<u>% Spent For Retail Purchases</u>	<u>Retail Disposable Income Per Capita</u>	<u>Population</u> ^(b)	<u>Total Retail Purchases</u> (In millions)	<u>% of Retail Sales Spent In Fairfax County</u>	<u>Retail Sales in Fairfax County</u>
1948	\$2,200	53%	\$1,170	85,000	\$ 99.5	21.2%	\$ 21.1
1953	2,680	47	1,260	230,000	289.8	42.9	124.3
1970	3,365	44	1,480	500,000	740.5	61.1	452.4
1980	3,835	42	1,611	700,000	1127.7	75.2	848.0

(a) 1954 dollars

(b) Arthur D. Little, Inc., estimates