



**MetroShops**

**Prince George's County Retail Market Analysis**

## **Appendix D**

**Analysis**

PREPARED BY **RCLCO** FOR M-NCPPC  
ROBERT CHARLES LESSER & CO.

AUGUST 2015



THE MARYLAND-NATIONAL CAPITAL PARK AND PLANNING COMMISSION  
14741 GOVERNOR ODEN BOWIE DRIVE  
UPPER MARLBORO, MD 20772  
[WWW.PGPLANNING.ORG](http://WWW.PGPLANNING.ORG)

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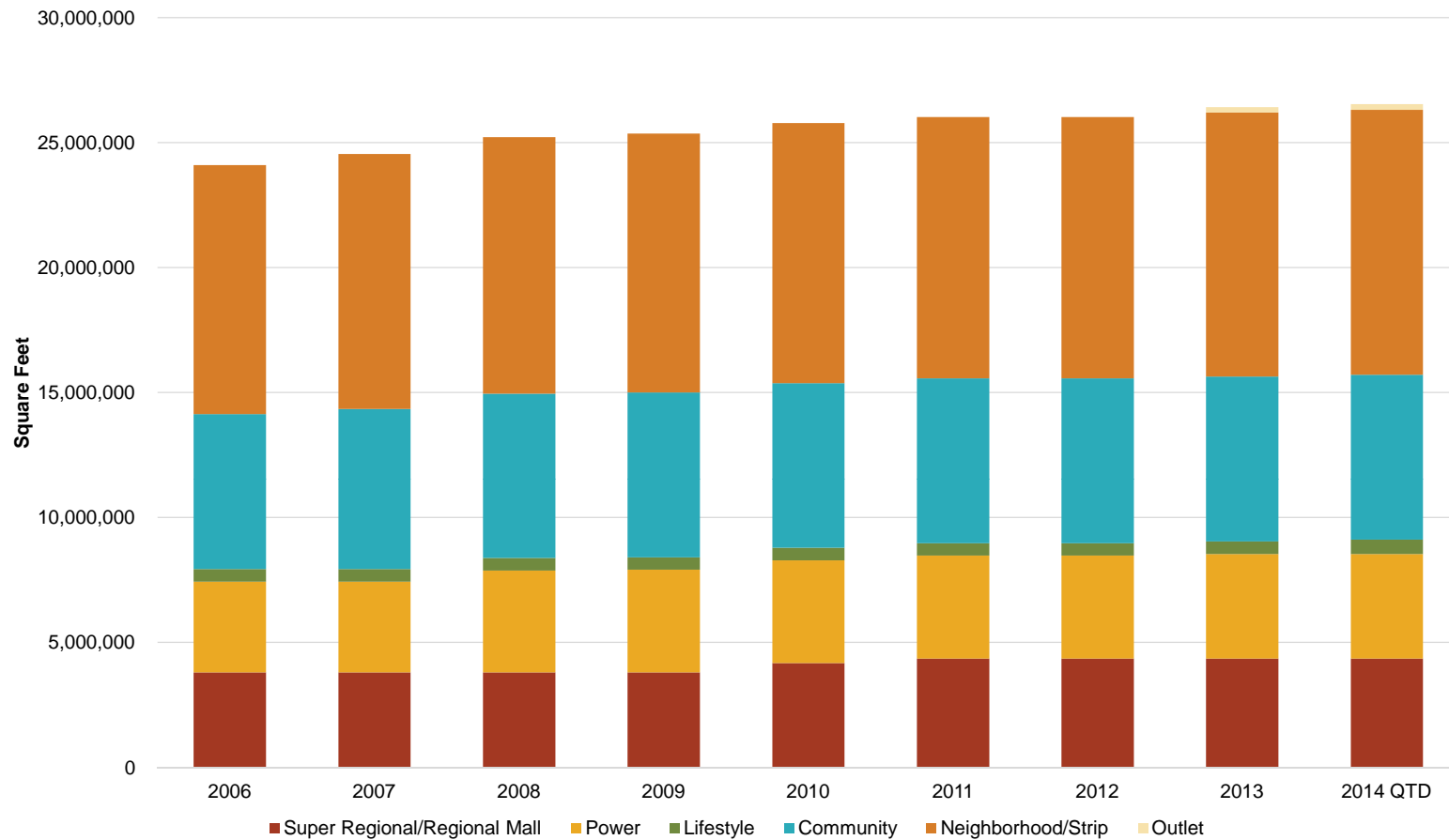


## I. EXISTING RETAIL PERFORMANCE

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*Exhibit I-1*

## HISTORICAL INVENTORY BY TYPE OF RETAIL PRINCE GEORGE'S COUNTY, MD 2006-2014 QTD

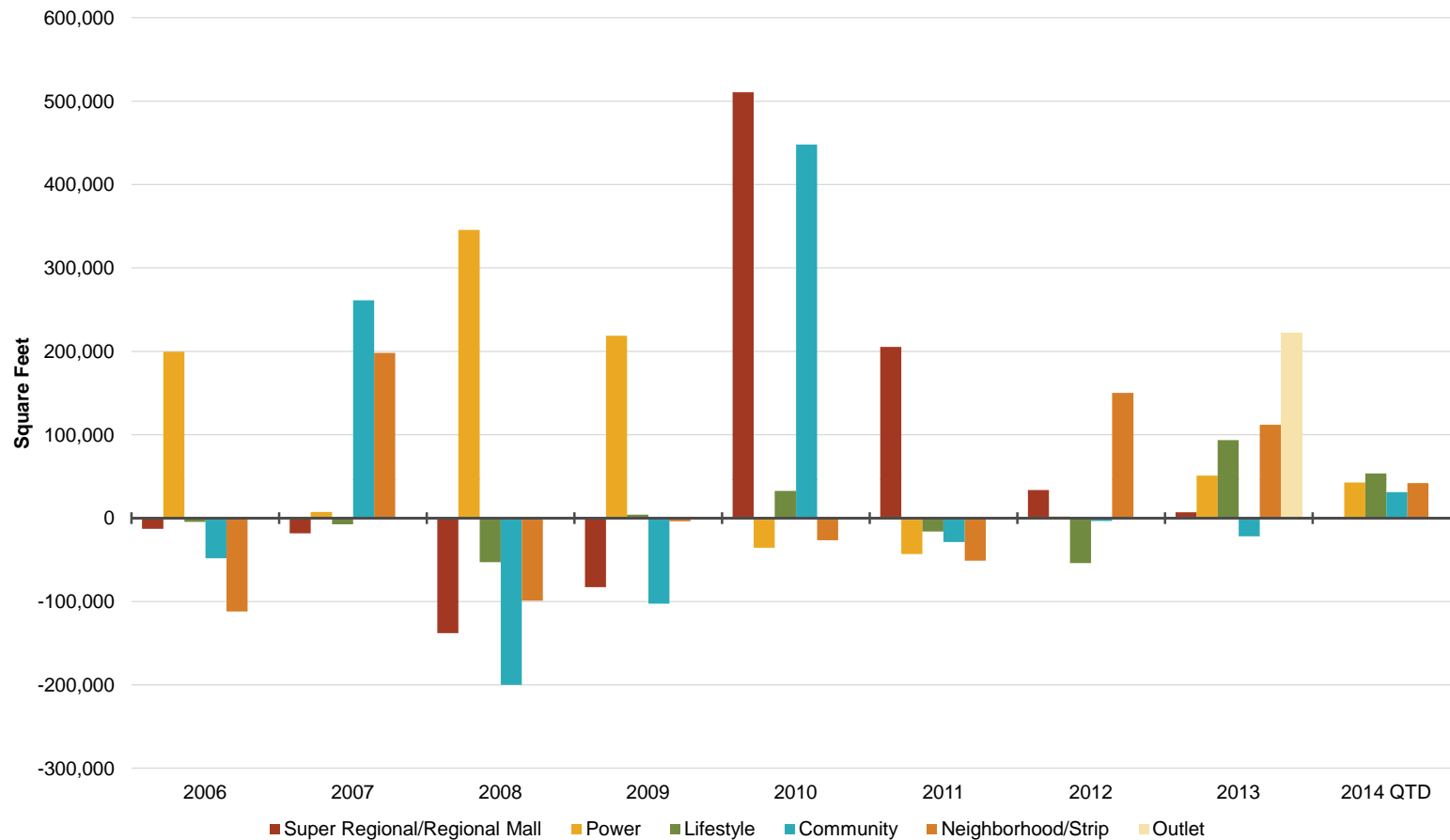


SOURCE: CoStar

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Exhibit I-2

## HISTORICAL ABSORPTION BY TYPE OF RETAIL PRINCE GEORGE'S COUNTY, MD 2006-2014 QTD



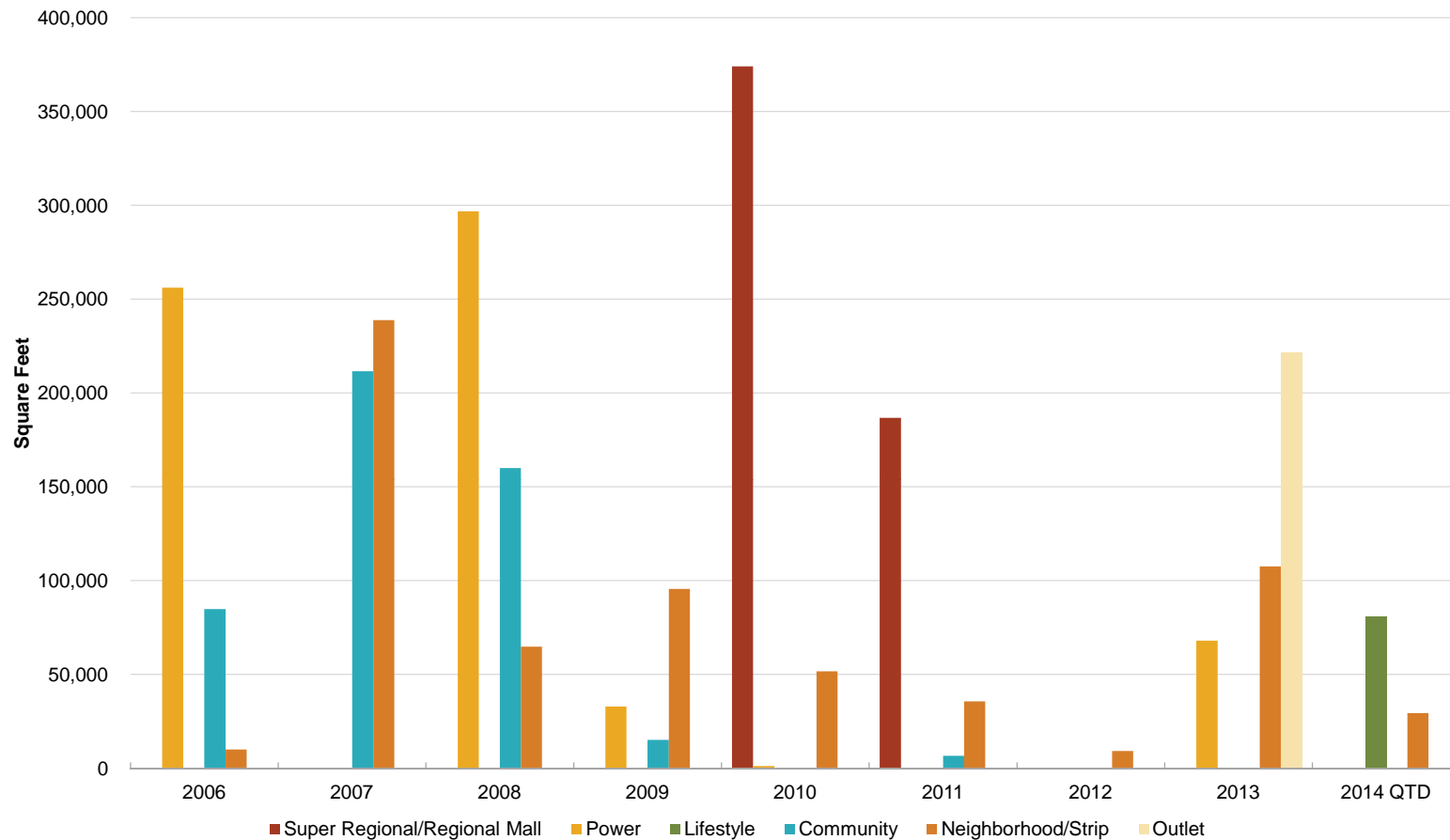
NOTE: CoStar classifies Woodmore Town Center as a regional mall, explaining the 2010 jump in absorption and deliveries in this sector, though we classify it as a lifestyle center in our inventory.

SOURCE: CoStar

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*Exhibit I-3*

## HISTORICAL DELIVERIES BY TYPE OF RETAIL PRINCE GEORGE'S COUNTY, MD 2006-2014 QTD



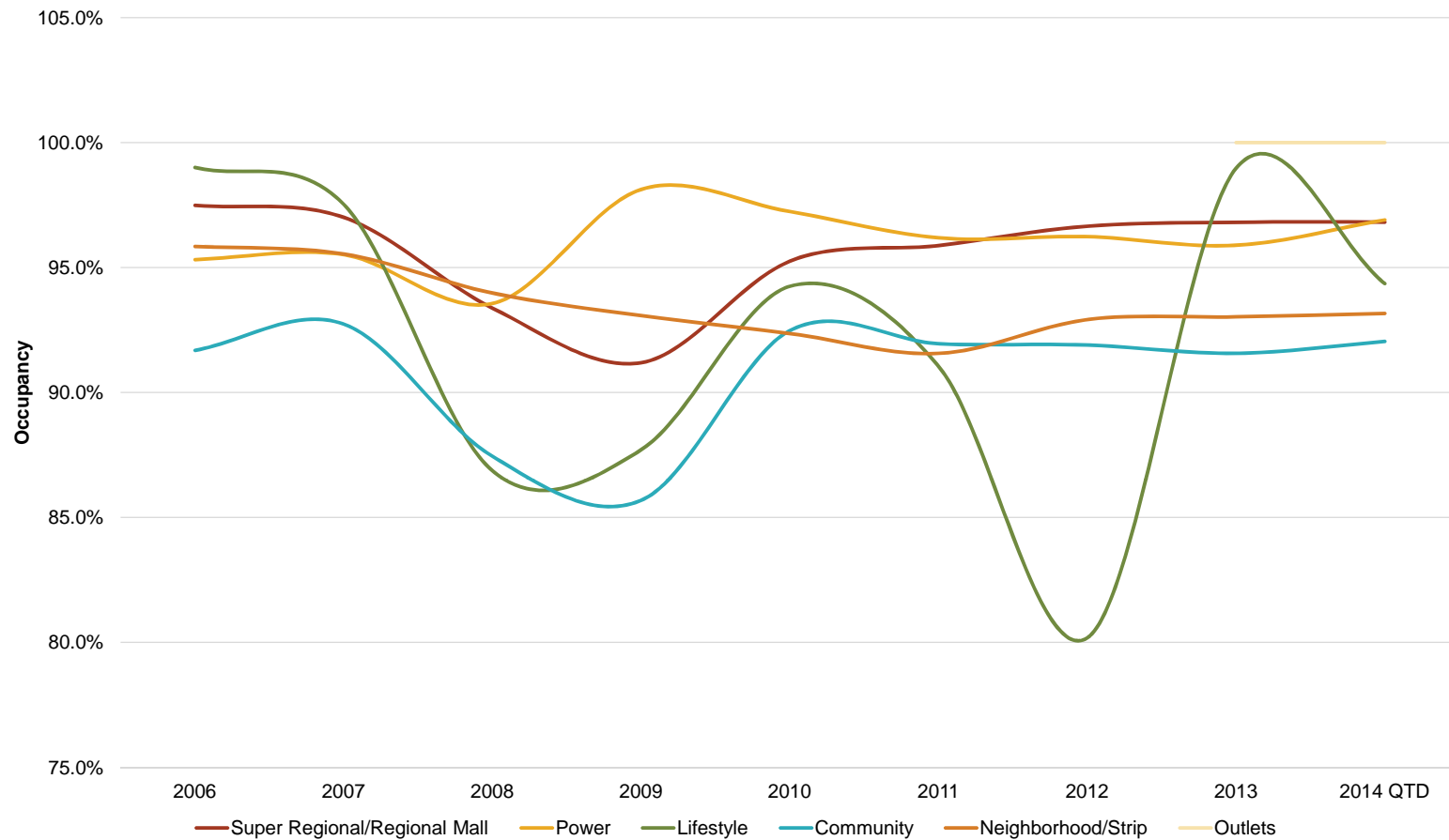
NOTE: CoStar classifies Woodmore Town Center as a regional mall, explaining the 2010 jump in absorption and deliveries in this sector, though we classify it as a lifestyle center in our inventory.

SOURCE: CoStar

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*Exhibit I-4*

## HISTORICAL VACANCY BY TYPE OF RETAIL PRINCE GEORGE'S COUNTY, MD 2006-2014 QTD



SOURCE: CoStar



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## Exhibit I-5

### MAJOR SHOPPING CENTER OPENINGS AND ABSORPTION PACE PRINCE GEORGE'S COUNTY, MD 2006-2014 QTD

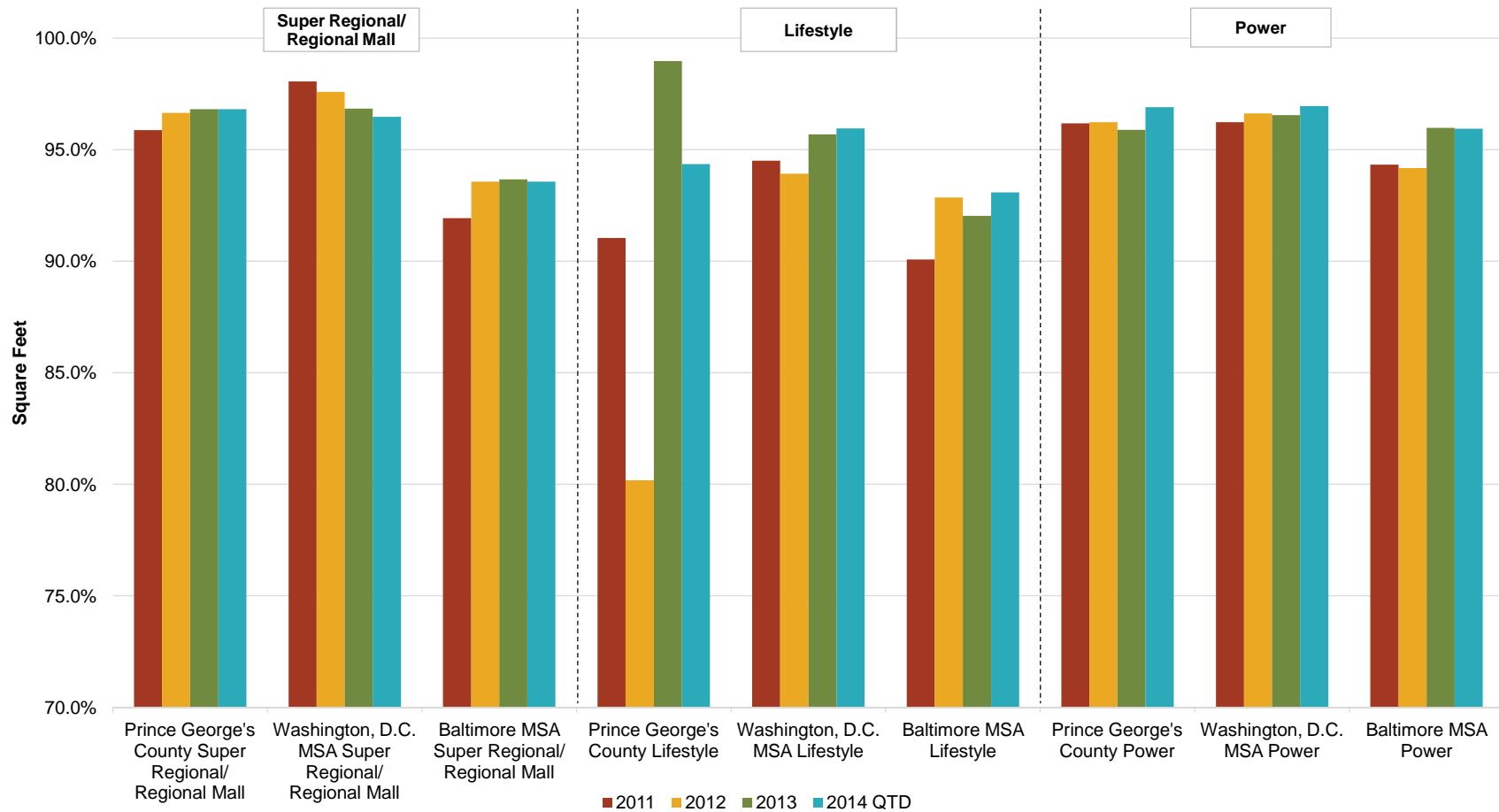
		2006	2007	2008	2009	2010	2011	2012	2013	2014
<b>Major Shopping Center Deliveries</b>										
Vista Gardens Marketplace	Power Center	256,072								
Fairwood Green	Neighborhood Center		119,084							
Metropolitan Shops	(CoStar defined as Community)			160,000						
Brandywine Crossing	Power Center			578,792						
Woodmore Towne Centre	(CoStar defined as Mall)					598,573				
Tanger Outlets	Outlet Center								221,765	
Towne Centre At Laurel	Lifestyle Center									335,655
<b>Net Absorption by Type of Center</b>										
Super Regional/Regional Mall		(13,018)	(18,190)	(137,860)	(82,900)	510,673	205,246	33,485	6,954	406
Power Center		199,357	7,187	345,634	218,687	(35,458)	(43,187)	2,026	50,833	42,601
Lifestyle Center		(4,437)	(7,371)	(53,081)	4,222	32,552	(15,961)	(54,078)	93,554	53,426
Community Center		(48,066)	261,305	(199,948)	(102,739)	448,068	(28,621)	(3,529)	(21,844)	31,277
Neighborhood/Strip Center		(111,926)	197,919	(98,889)	(3,709)	(26,445)	(50,991)	150,287	111,823	41,964
Outlet Center		--	--	--	--	--	--	--	221,765	--
<b>Total Net Absorption</b>		<b>21,910</b>	<b>440,850</b>	<b>(144,144)</b>	<b>33,561</b>	<b>929,390</b>	<b>66,486</b>	<b>128,191</b>	<b>463,085</b>	<b>169,674</b>

SOURCE: CoStar; RCLCO

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Exhibit I-6

## SUPER REGIONAL/REGIONAL MALLS, LIFESTYLE, AND POWER CENTER RETAIL OCCUPANCY RATE PRINCE GEORGE'S COUNTY, MD; WASHINGTON, D.C., MSA; AND BALTIMORE MSA 2011-2014 QTD

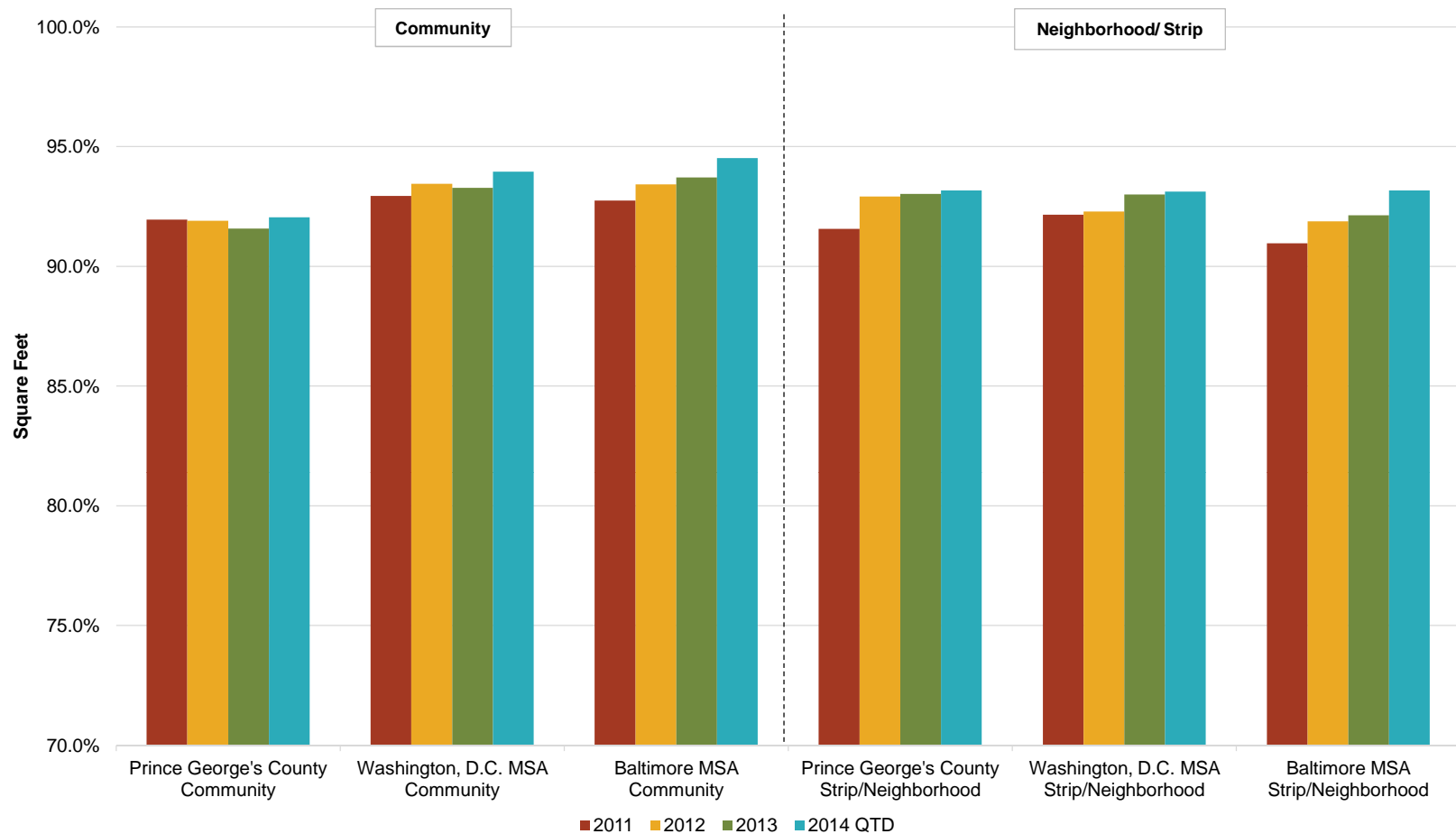


SOURCE: CoStar

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Exhibit I-7

## COMMUNITY AND NEIGHBORHOOD/STRIP CENTER RETAIL OCCUPANCY RATE PRINCE GEORGE'S COUNTY, MD; WASHINGTON, D.C., MSA; AND BALTIMORE MSA 2011-2014 QTD

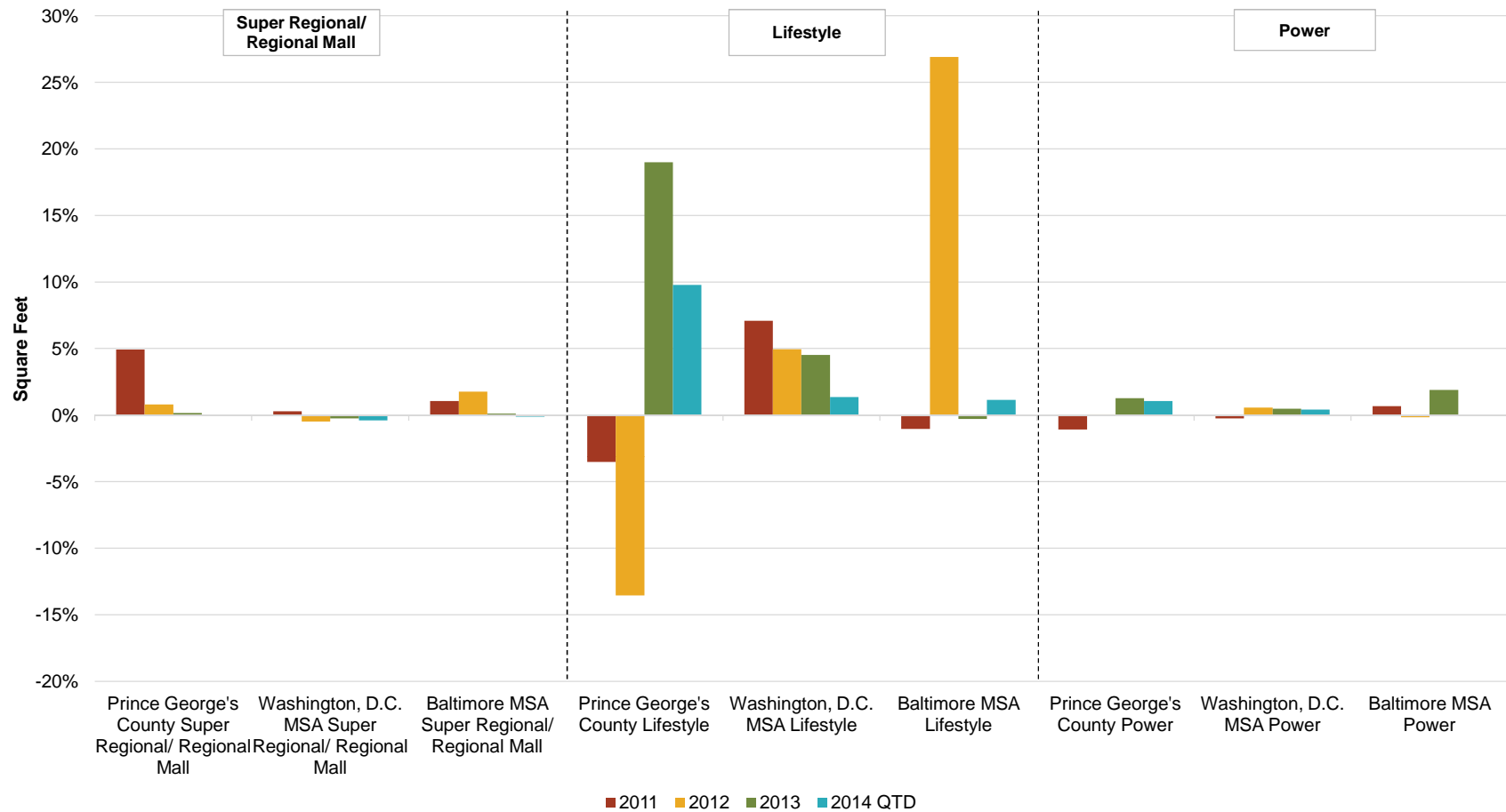


SOURCE: CoStar

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Exhibit I-8

## SUPER REGIONAL/REGIONAL MALLS, LIFESTYLE, AND POWER CENTER ABSORPTION AS PERCENT OF OCCUPIED SPACE PRINCE GEORGE'S COUNTY, MD; WASHINGTON, D.C., MSA; AND BALTIMORE MSA 2011-2014 QTD

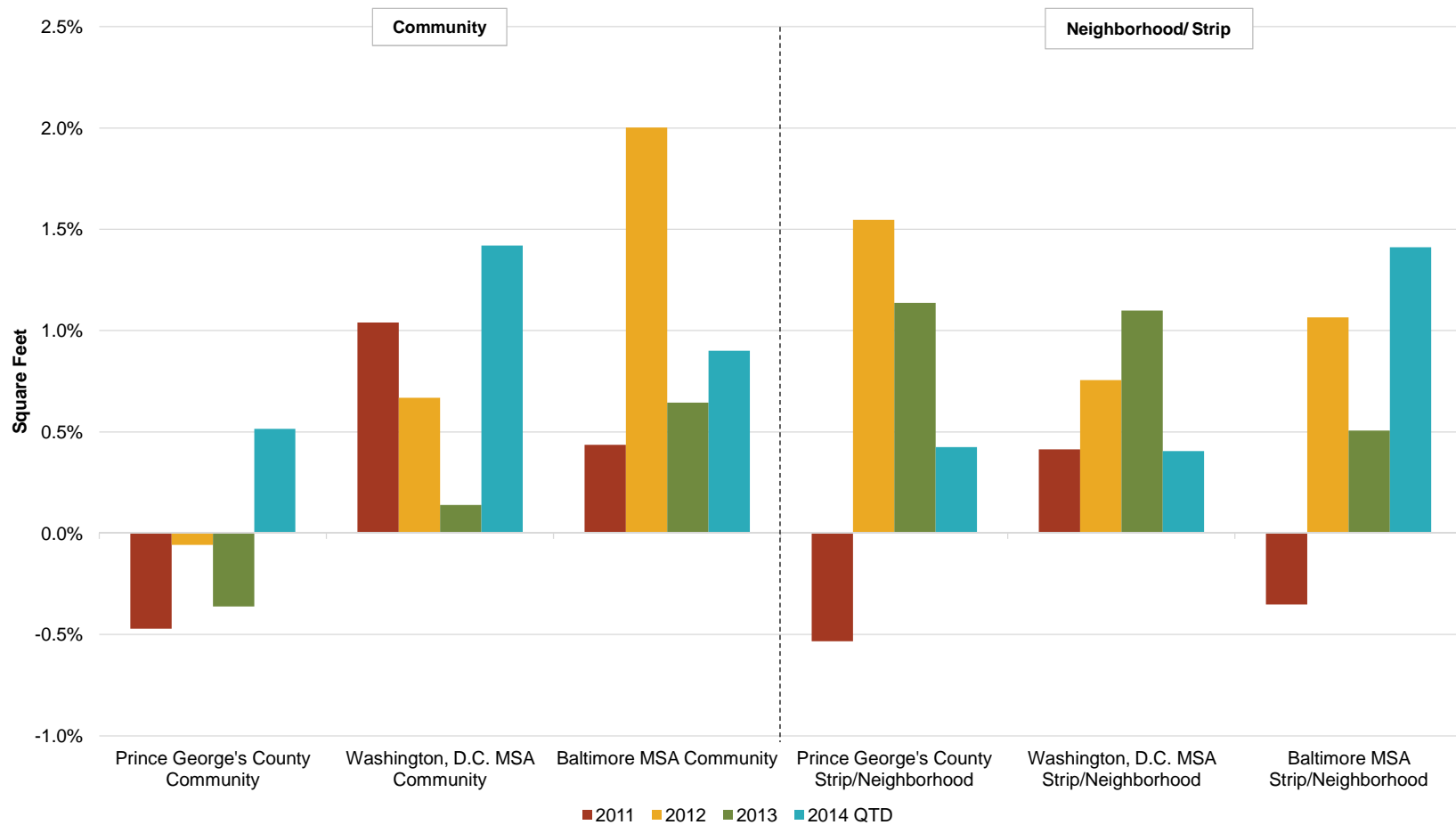


SOURCE: CoStar

# M-NCPPC

Exhibit I-9

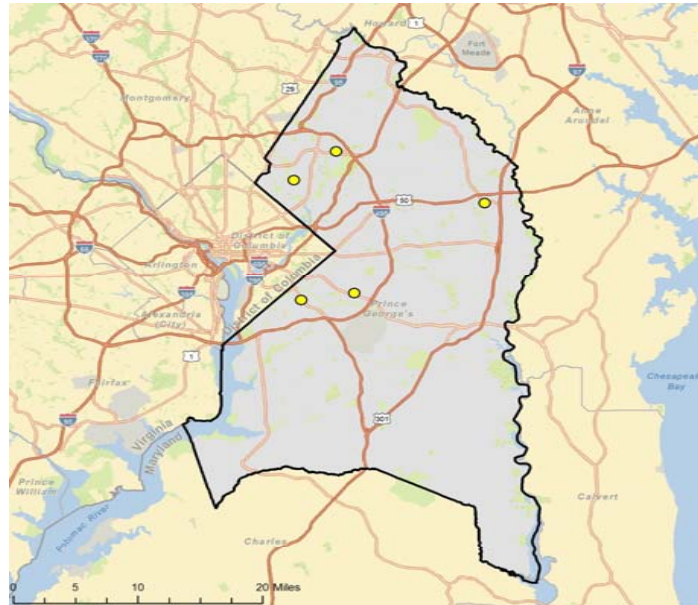
## COMMUNITY AND NEIGHBORHOOD/STRIP CENTER ABSORPTION AS PERCENT OF OCCUPIED SPACE PRINCE GEORGE'S COUNTY, MD; WASHINGTON, D.C., MSA; AND BALTIMORE MSA 2011-2014 QTD





## Exhibit I-10

### SUPER REGIONAL AND REGIONAL MALL LOCATIONS AND CURRENT PROPERTY STATISTICS PRINCE GEORGE'S COUNTY, MD 2014



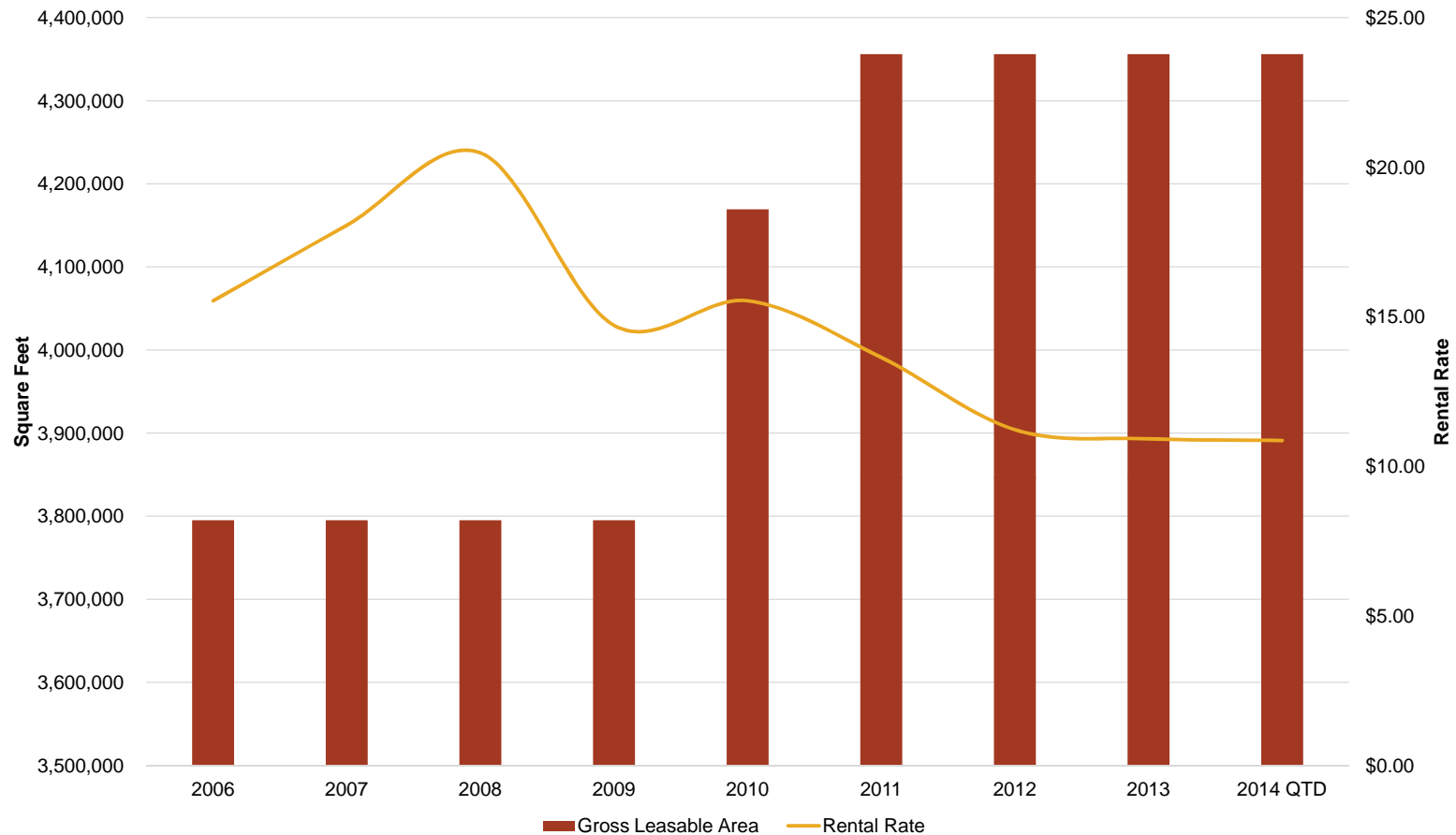
Center Name	City	Year Built	Year Renovated	GLA	Percent Leased	Avg. Rental Rate	Anchor Tenants
<b>Super-Regional</b>							
The Mall At Prince Georges	Hyattsville	1957	2004	928,274	96%	Withheld	Target, Macy's, JCPenney; TJ Maxx, Marshalls, Old Navy, Ross
Beltway Plaza Mall	College Park	1961	2000	900,220	92%	\$16.32	Target, Burlington Coat Factory, Giant Food, Marshalls, Jo-Ann Stores, Shoppers World, Big Lots
Bowie Town Center	Bowie	2001	N/A	828,688	100%	Withheld	Macy's, Sears, Best Buy, Barnes & Noble, Safeway, Off Broadway Shoes
<b>Regional</b>							
Iverson Mall	Temple Hills	1967	2002	620,209	98%	Withheld	Burlington Coat Factory, Forman Mills
Centre at Forestville	Forestville	1980	2004	480,163	100%	Withheld	Target, JCPenney

SOURCE: CoStar, Esri Business Analyst, RCLCO

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Exhibit I-11

## SUPER REGIONAL AND REGIONAL MALLS - INVENTORY AND AVERAGE RENTAL RATE PRINCE GEORGE'S COUNTY, MD 2006-2014 QTD



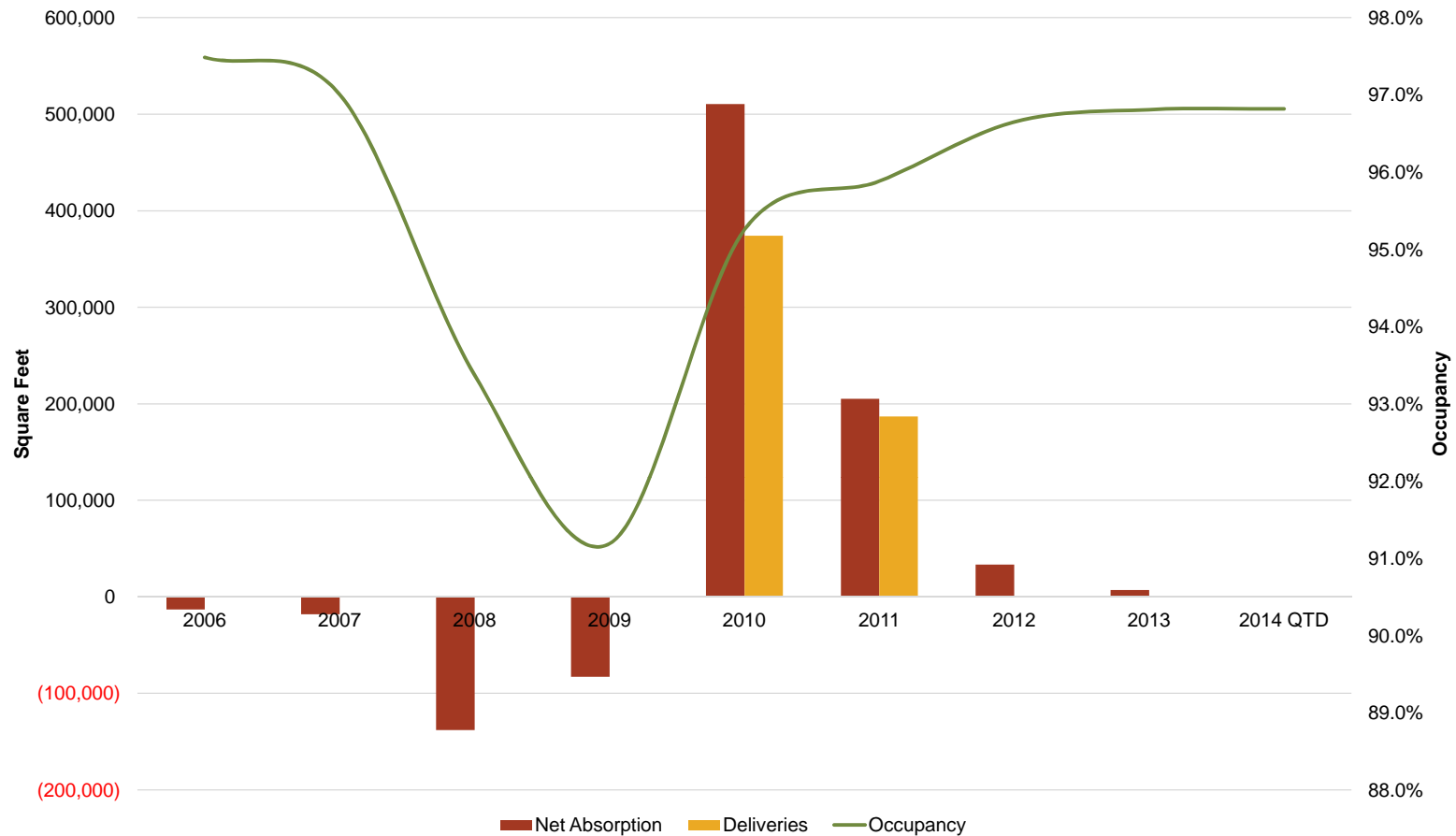
NOTE: Though RCLCO classifies Woodmore Town Center as a Lifestyle Center, CoStar classifies it as a regional mall, explaining the 2010 jump in inventory as per CoStar's data.

SOURCE: CoStar

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Exhibit I-12

## SUPER REGIONAL AND REGIONAL MALLS - ABSORPTION, DELIVERIES, AND OCCUPANCY PRINCE GEORGE'S COUNTY, MD 2006-2014 QTD

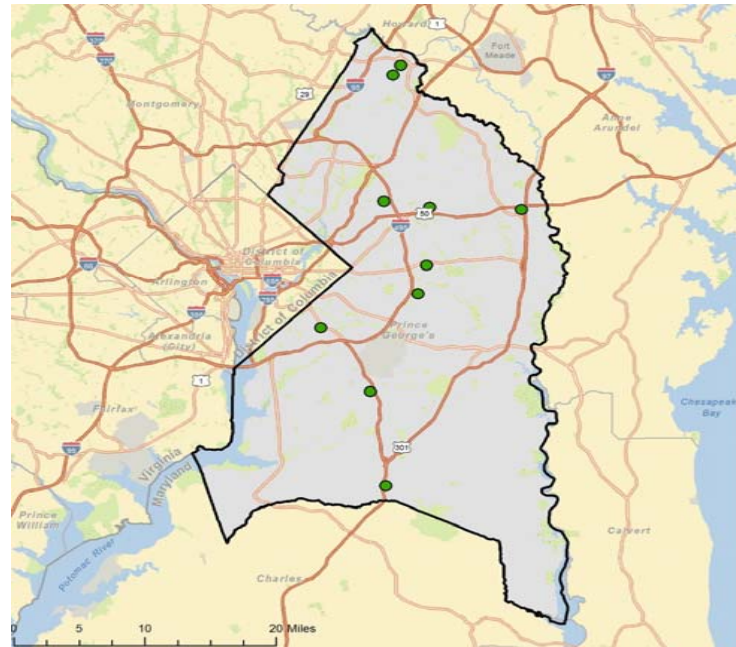


NOTE: Though RCLCO classifies Woodmore Town Center as a Lifestyle Center, CoStar classifies it as a regional mall, explaining the 2010 jump in deliveries as per CoStar's data.

SOURCE: CoStar

## Exhibit I-13

### POWER CENTER RETAIL LOCATIONS AND CURRENT PROPERTY STATISTICS PRINCE GEORGE'S COUNTY, MD 2014

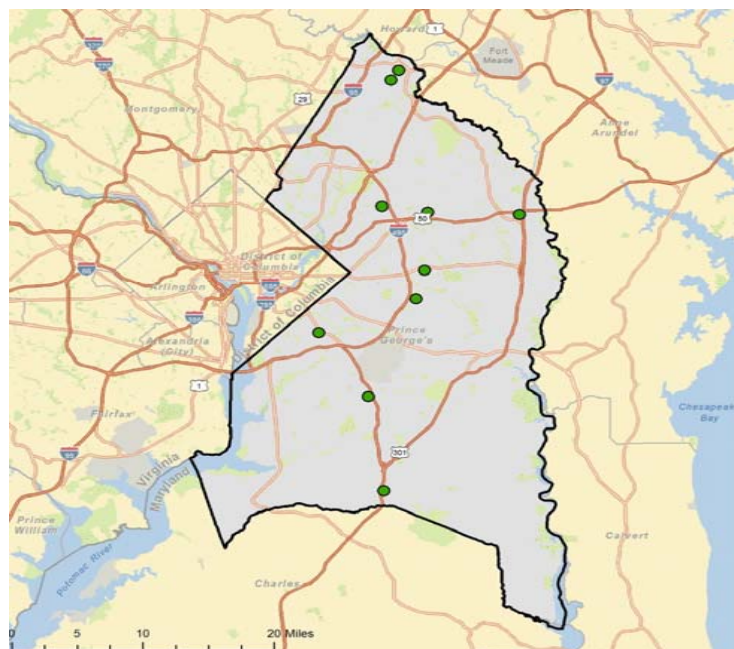


Center Name	City	Year Built	Year Renovated	GLA	Percent Leased	Avg. Rental Rate	Anchor Tenants
Marlow Heights Shopping Center	Temple Hills	1957	2001	762,291	98%	\$23.16	Giant Food, Macy's, Dollar Tree, Marlow Cinema 6
Brandywine Crossing	Brandywine	2008	N/A	578,792	98%	Withheld	Costco, Target, Marshalls, Safeway, Jo-Ann Fabrics, Xscape Theaters
Bowie Gateway Center	Bowie	1995	N/A	564,067	100%	Withheld	Target, Havertys Furniture, Sports Authority, PetSmart, Big Lots, Staples
Woodyard Crossing Shopping Center	Clinton	1982	N/A	484,542	98%	\$24.00	Walmart, Lowe's, Safeway, Dollar Tree, Petco,
Laurel Lakes Centre	Laurel	1985	1999	460,892	98%	\$35.04	Lowe's, Safeway, Best Buy, Ross Dress for Less, Michaels, Staples, DSW

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**Exhibit I-13**

**POWER CENTER RETAIL LOCATIONS AND CURRENT PROPERTY STATISTICS  
PRINCE GEORGE'S COUNTY, MD  
2014**



Center Name	City	Year Built	Year Renovated	GLA	Percent Leased	Avg. Rental Rate	Anchor Tenants
Largo Plaza	Largo	1973	1998	404,132	97%	Withheld	Lowe's, Target, Giant Food, PetSmart, Staples
Laurel Shopping Center	Laurel	1956	1994	399,412	89%	Withheld	LA Fitness, Marshalls, Giant Food, Harbor Freight Tools, CVS Pharmacy, Books-A-Million
The Shoppes At New Carrollton	New Carrollton	1960	2001	309,061	98%	Withheld	Lowe's, Shoppers Food Warehouse and Pharmacy, K&C
Vista Gardens Marketplace	Bowie	2006	N/A	256,072	99%	Withheld	Target, Office Depot, Home Depot, Shoppers Food Warehouse and Pharmacy
Ritchie Station Marketplace	Upper Marlboro	2010	N/A	250,000	N/A	Withheld	BJs, TJ Maxx, BigLots, Dollar Tree, Modell's, Bed Bath & Beyond

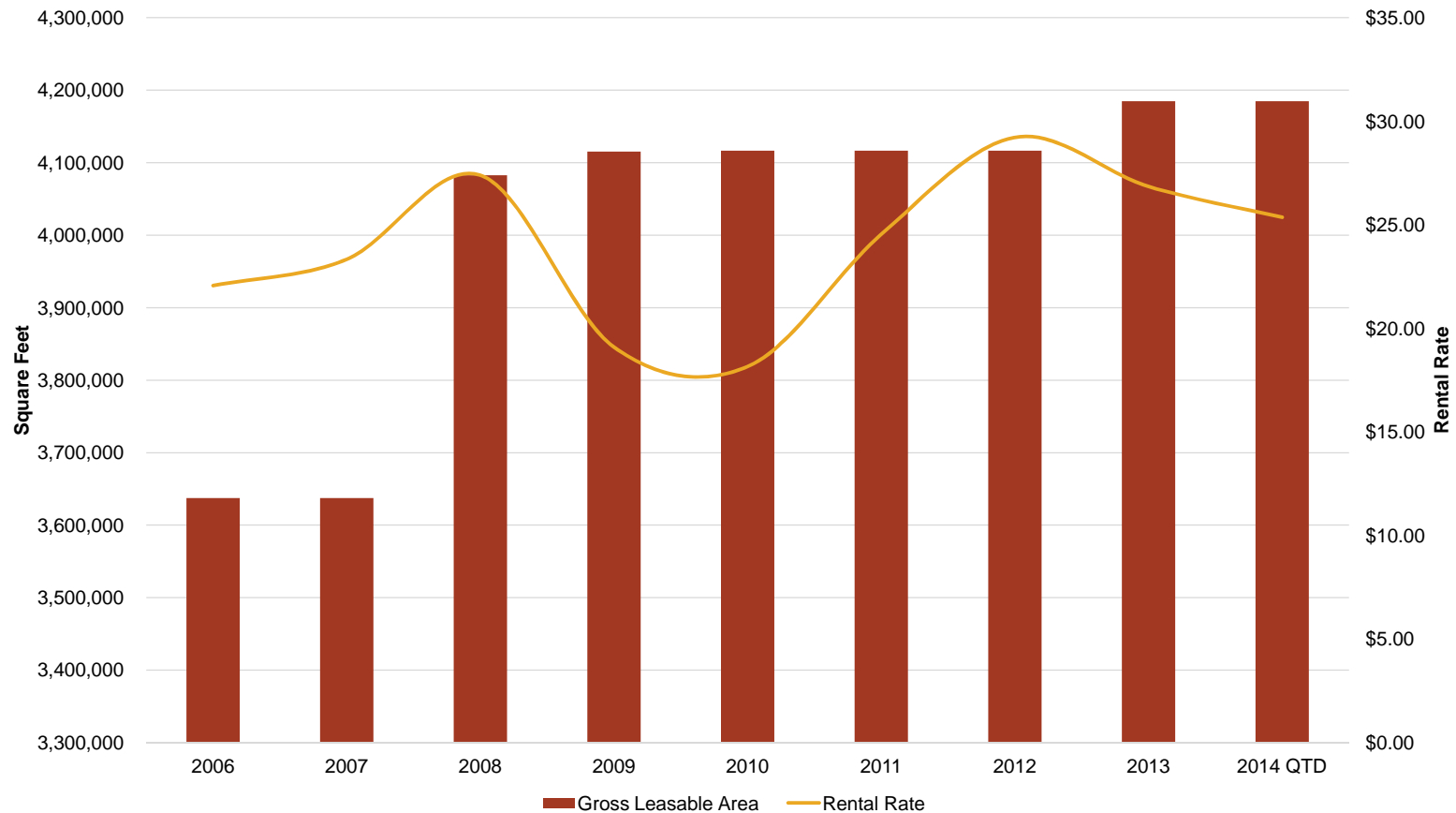
SOURCE: CoStar, Esri Business Analyst, RCLCO



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Exhibit I-14

**POWER CENTER RETAIL - INVENTORY AND AVERAGE RENTAL RATE  
PRINCE GEORGE'S COUNTY, MD  
2006-2014 QTD**

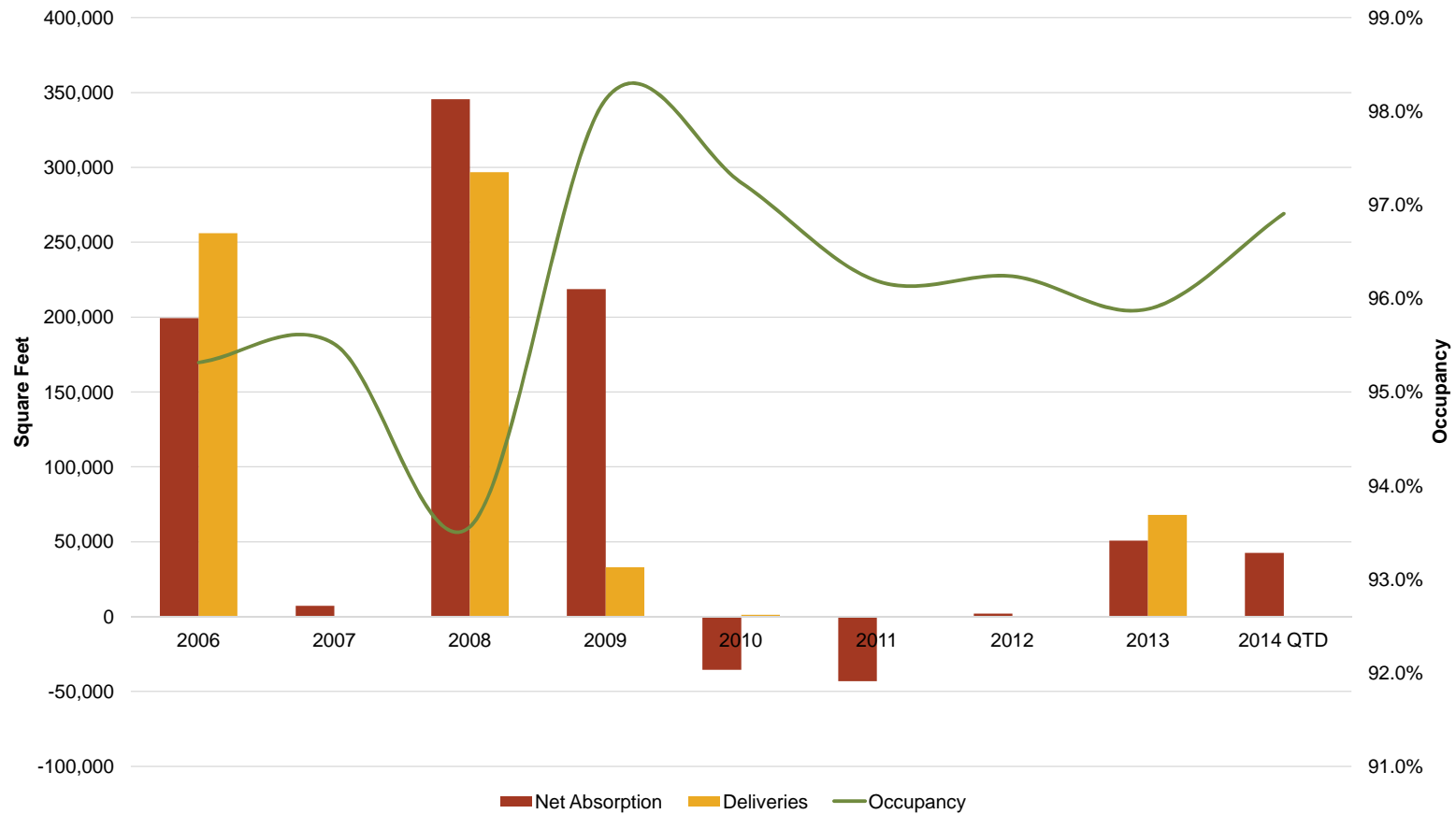


SOURCE: CoStar

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Exhibit I-15

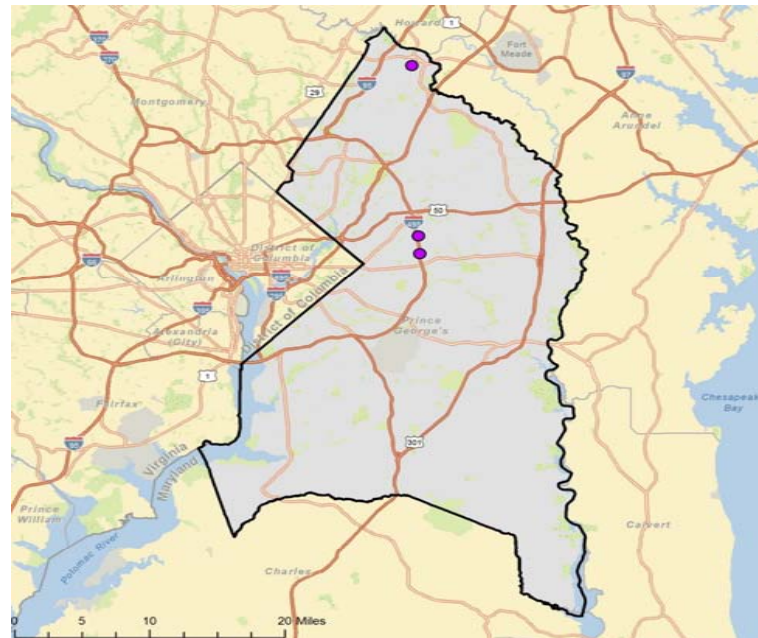
## POWER CENTER RETAIL - ABSORPTION, DELIVERIES, AND OCCUPANCY PRINCE GEORGE'S COUNTY, MD 2006-2014 QTD



SOURCE: CoStar

## Exhibit I-16

### LIFESTYLE CENTER RETAIL LOCATIONS AND CURRENT PROPERTY STATISTICS PRINCE GEORGE'S COUNTY, MD 2014



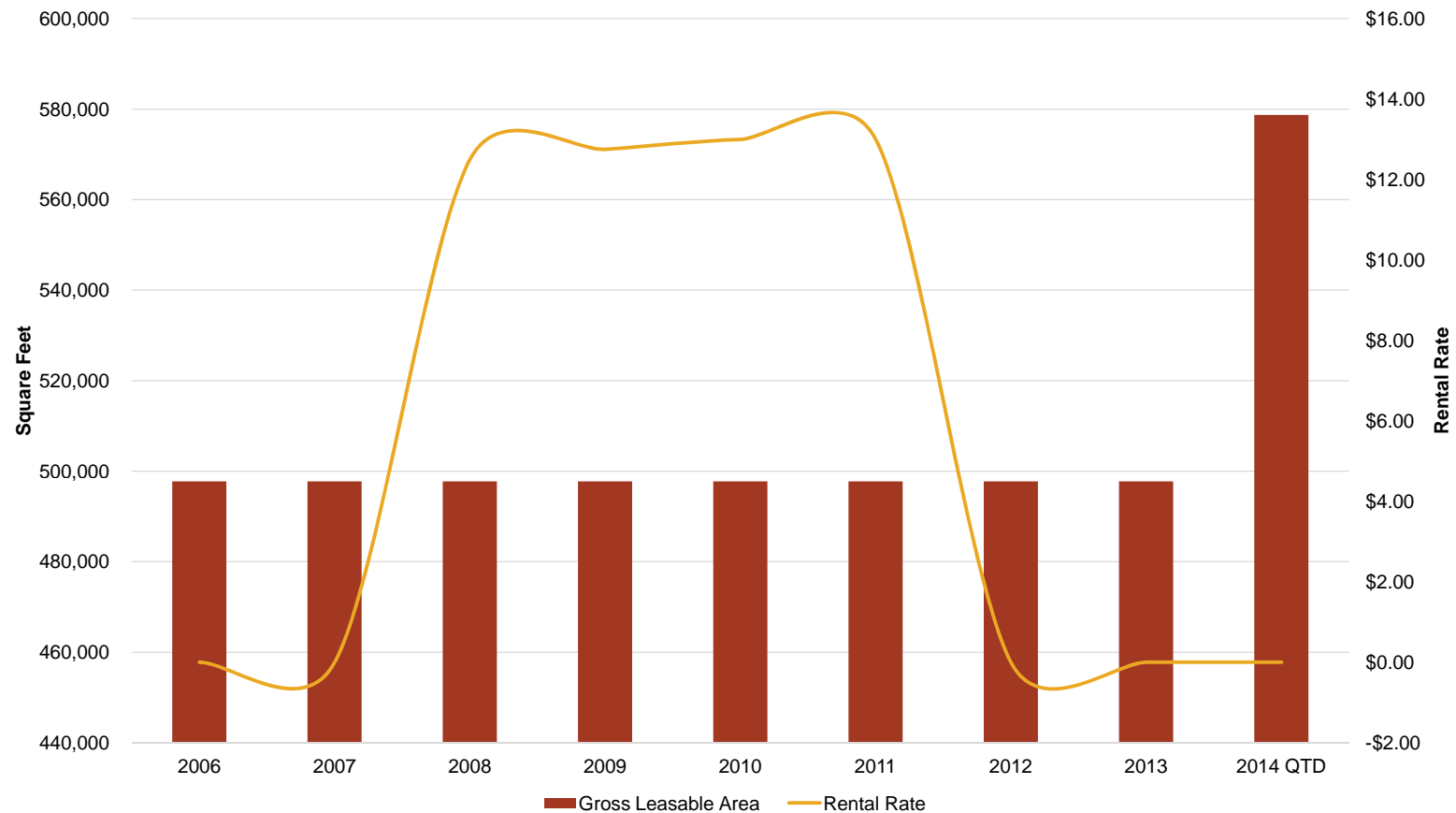
Center Name	City	Year Built	Year Renovated	GLA	Percent Leased	Avg. Rental Rate	Anchor Tenants
Boulevard At The Capital Centre	Largo	2002	N/A	497,767	96%	Withheld	Sports Authority, Magic Johnson Theatres, Shoppers World, DSW, Beauty Land, Gold's Gym
Towne Centre At Laurel	Laurel	2014	N/A	335,655	72%	Withheld	Old Navy, Harris Teeter; Party City; Regal Cinemas, Sports Authority
Woodmore Towne Center	Glenarden	2010	N/A	598,573	100%	Withheld	Costco, Wegmans, JC Penney, Best Buy, Petco, Party City, 24 Hour Fitness

SOURCE: CoStar, Esri Business Analyst, RCLCO

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Exhibit I-17

## LIFESTYLE CENTER RETAIL - INVENTORY AND AVERAGE RENTAL RATE PRINCE GEORGE'S COUNTY, MD 2006-2014 QTD



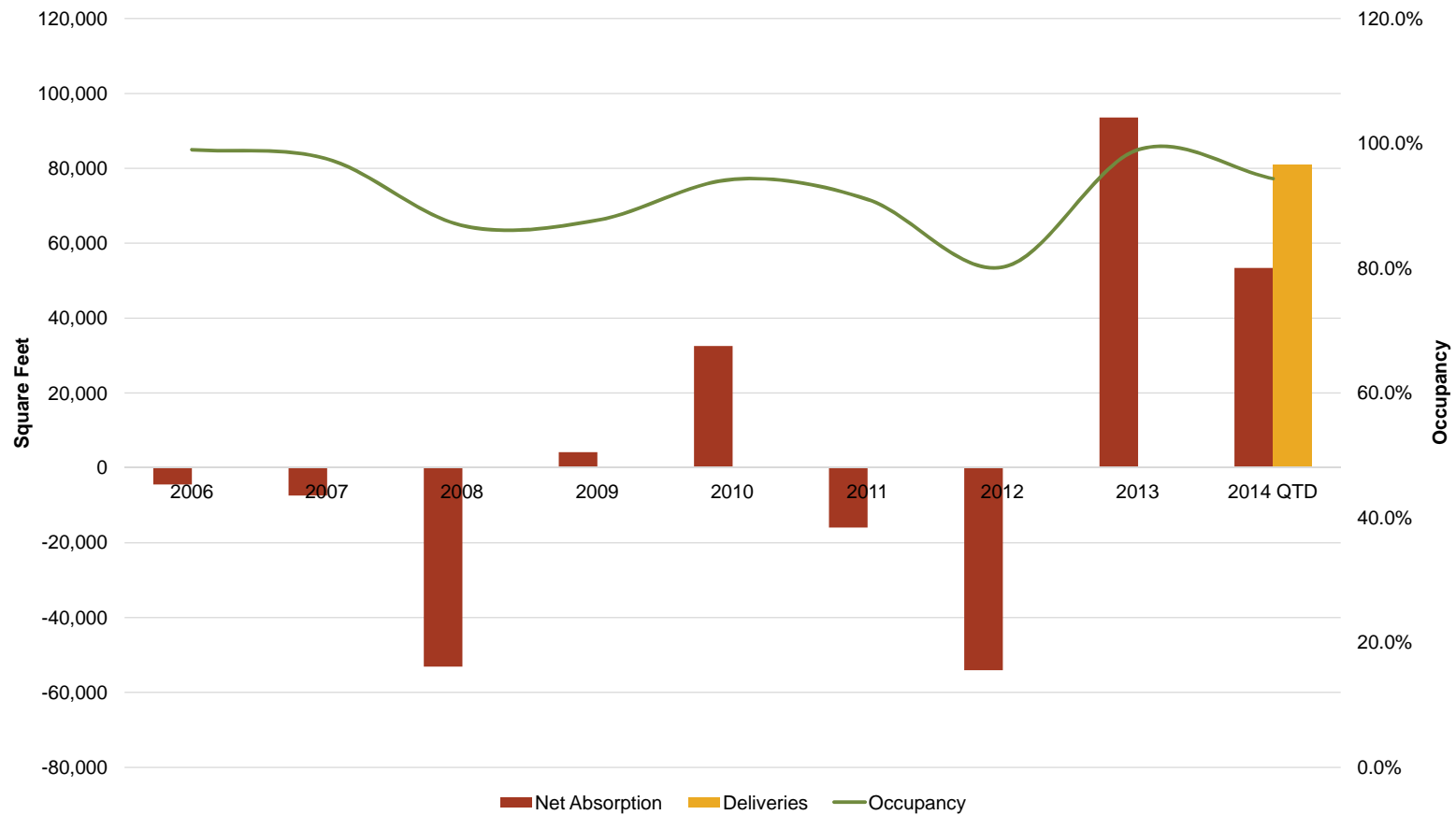
NOTE: Though RCLCO classifies Woodmore Town Center as a Lifestyle Center, CoStar classifies it as a regional mall, explaining why there is no new inventory when the center delivered in 2010 as per CoStar's data.

SOURCE: CoStar

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Exhibit I-18

## LIFESTYLE CENTER RETAIL - ABSORPTION, DELIVERIES, AND OCCUPANCY PRINCE GEORGE'S COUNTY, MD 2006-2014 QTD



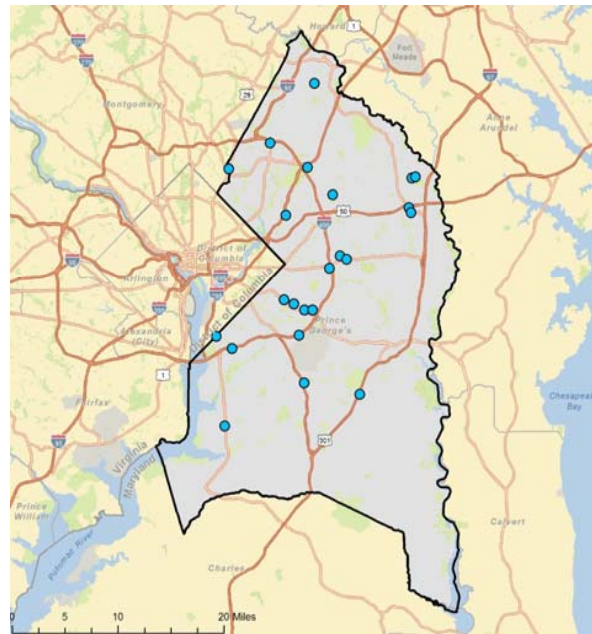
NOTE: Though RCLCO classifies Woodmore Town Center as a Lifestyle Center, CoStar classifies it as a regional mall, explaining why there are no new deliveries when the center delivered in 2010 as per CoStar's data.

SOURCE: CoStar



## Exhibit I-19

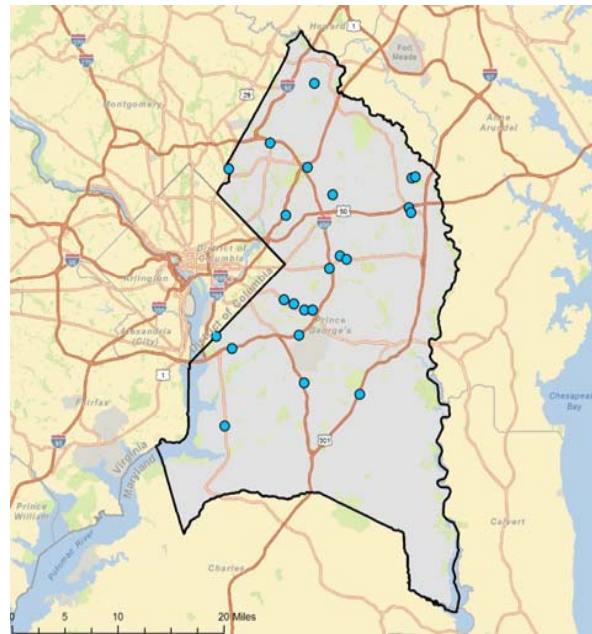
### COMMUNITY CENTER RETAIL LOCATIONS AND CURRENT PROPERTY STATISTICS PRINCE GEORGE'S COUNTY, MD 2014



Center Name	City	Year Built	Year Renovated	GLA	Percent Leased	Avg. Rental Rate	Anchor Tenants
Bowie Town Center Strip	Bowie	1997	N/A	139,889	100%	Withheld	Regal Cinemas
Free State Shopping Center	Bowie	2001	N/A	107,005	100%	Withheld	Safeway, Dollar Tree
The Hilltop Plaza	Bowie	1970	1995	275,674	95%	Withheld	Giant Food, TJ Maxx, Rugged Wearhouse, Office Depot, Ross Dress for Less
Andrews Manor Shopping Center	Bowie	1969	2011	151,924	93%	Withheld	ALDI, Advance Auto Parts, Dollar Tree, MOM's - My Organic Market
Kingdom Square	Camp Springs	1960	1995	118,436	60%	\$16.56	Family Dollar, Value Village, ShopSmart
Clinton Plaza	Capitol Heights	1970	1989	384,790	93%	Withheld	Family Dollar, Fitness4Less, The Sanctuary
College Park Marketplace	Clinton	1980	N/A	272,392	80%	\$25.68	Kmart, Gmart, Toys R Us
Great Eastern Plaza	College Park	1998	N/A	238,765	99%	Withheld	Home Depot, Shoppers, Best Buy
	District Heights	1958	N/A	250,105	98%	Withheld	New24 Fitness, Vacant Anchor

## Exhibit I-19

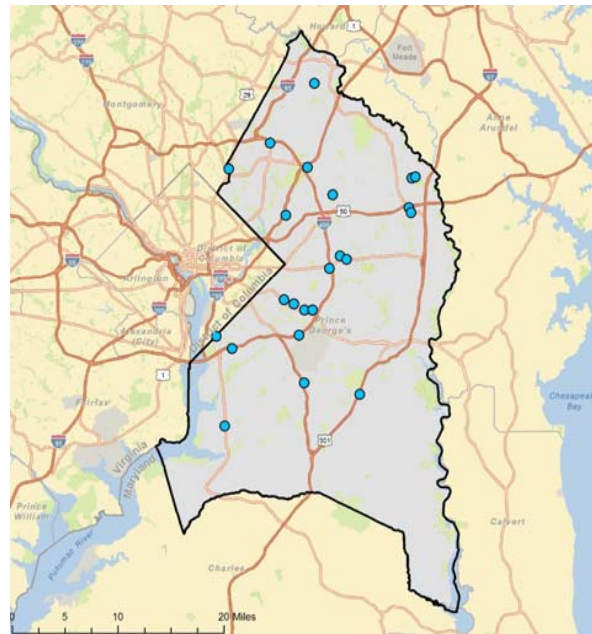
### COMMUNITY CENTER RETAIL LOCATIONS AND CURRENT PROPERTY STATISTICS PRINCE GEORGE'S COUNTY, MD 2014



Center Name	City	Year Built	Year Renovated	GLA	Percent Leased	Avg. Rental Rate	Anchor Tenants
Penn Station Shopping Center	District Heights	1989	N/A	239,580	88%	Withheld	Sav-A-Lot, Dollar Tree, Planet Fitness
Penn-Mar Shopping Center	Forestville	1960	2004	386,551	95%	Withheld	Burlington Coat Factory, Shoppers Food Warehouse and Pharmacy, Staples, Dollar Tree, Petco
Forestville Plaza Shopping Center	Forestville	1973	N/A	303,881	89%	Withheld	Rose's, Sav-A-Lot
Olde Forte Village	Fort Washington	1981	2003	136,841	95%	Withheld	Safeway, Dollar Tree, Advanced Auto Parts
Greenway Center	Greenbelt	1980	2008	284,292	98%	\$27.00	Safeway, Ross Dress for Less, Modell's Sporting Goods, Dollar Tree, CVS Pharmacy, Dress Barn, PetSmart
Enterprise Plaza	Hyattsville	1965	1991	202,060	100%	Withheld	Dollar Tree, USA Discounters, ALDI, TJ Maxx, Family Dollar, Advanced Auto Parts
Langley Park Plaza	Hyattsville	1977	N/A	127,723	96%	\$24.96	Atlantic Supermarket International Foods, CVS, Regency Furniture
Capital Plaza Shopping Center	Landover Hills	1963	1986	326,765	95%	Withheld	Walmart, Grand Mart International Food

## Exhibit I-19

### COMMUNITY CENTER RETAIL LOCATIONS AND CURRENT PROPERTY STATISTICS PRINCE GEORGE'S COUNTY, MD 2014

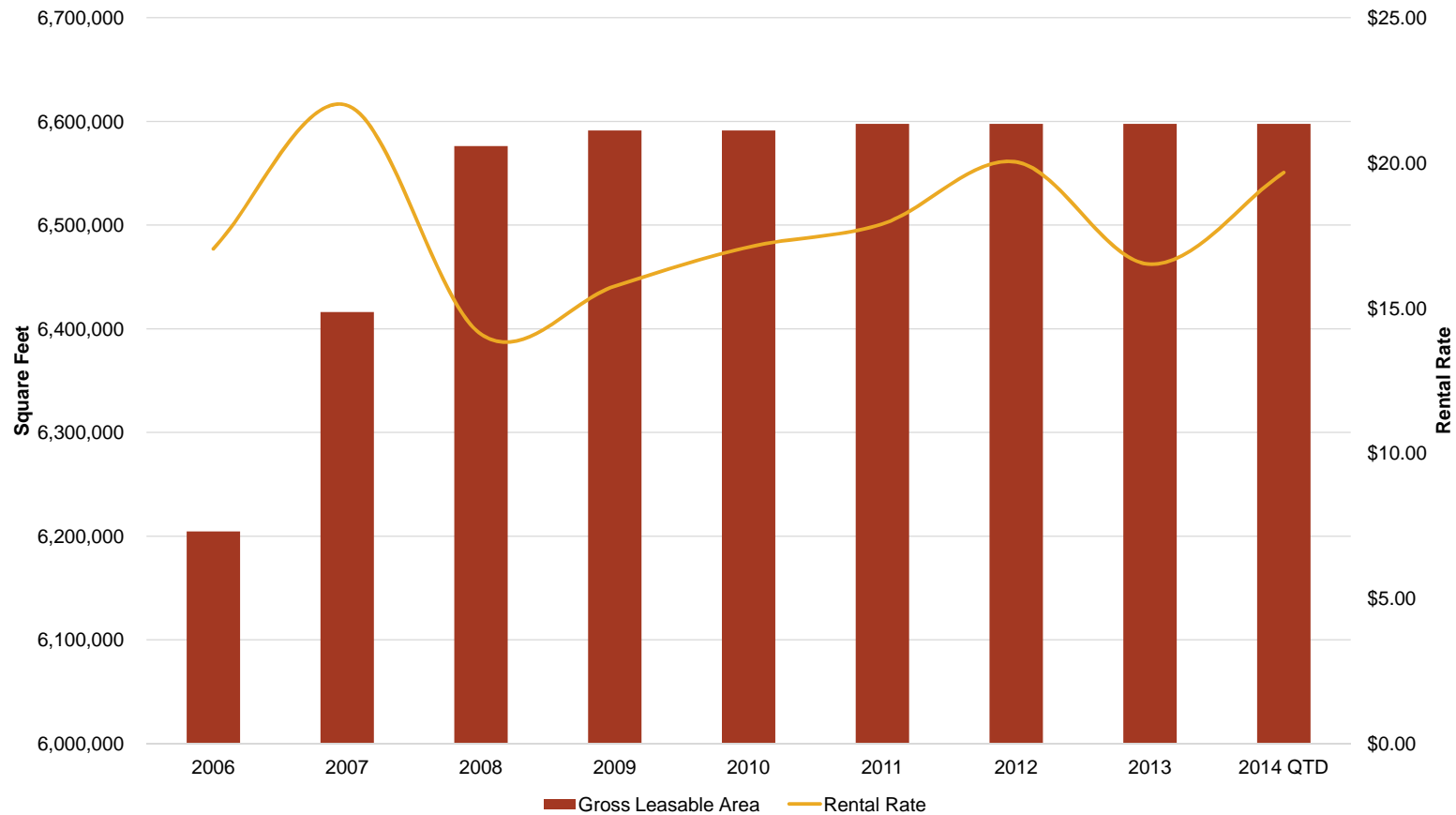


Center Name	City	Year Built	Year Renovated	GLA	Percent Leased	Avg. Rental Rate	Anchor Tenants
Centre at Laurel	Laurel	2005	N/A	157,963	99%	Withheld	Shoppers, PetSmart, Sears Home Appliance
Rivertowne Commons	Oxon Hill	1986	N/A	421,199	100%	\$24.96	Kmart, Staples, Ross, Safeway, CVS, Dollar Tree
Eastover Shopping Center	Oxon Hill	1953	1993	269,621	89%	Withheld	Giant, Dollar Tree, CVS
Largo Towne Center	Upper Marlboro	1991	N/A	262,058	98%	Withheld	Shoppers, Regency Furniture, Marshalls, Dollar Tree, Advance Auto Parts
Kettering Plaza	Upper Marlboro	1974	N/A	89,428	100%	Withheld	Ross, CVS
Marlton Plaza	Upper Marlboro	1979	1991	77,012	100%	\$24.00	Food Lion, Rite Aid

SOURCE: CoStar, Esri Business Analyst, RCLCO

## Exhibit I-20

### COMMUNITY CENTER RETAIL - INVENTORY AND AVERAGE RENTAL RATE PRINCE GEORGE'S COUNTY, MD 2006-2014 QTD

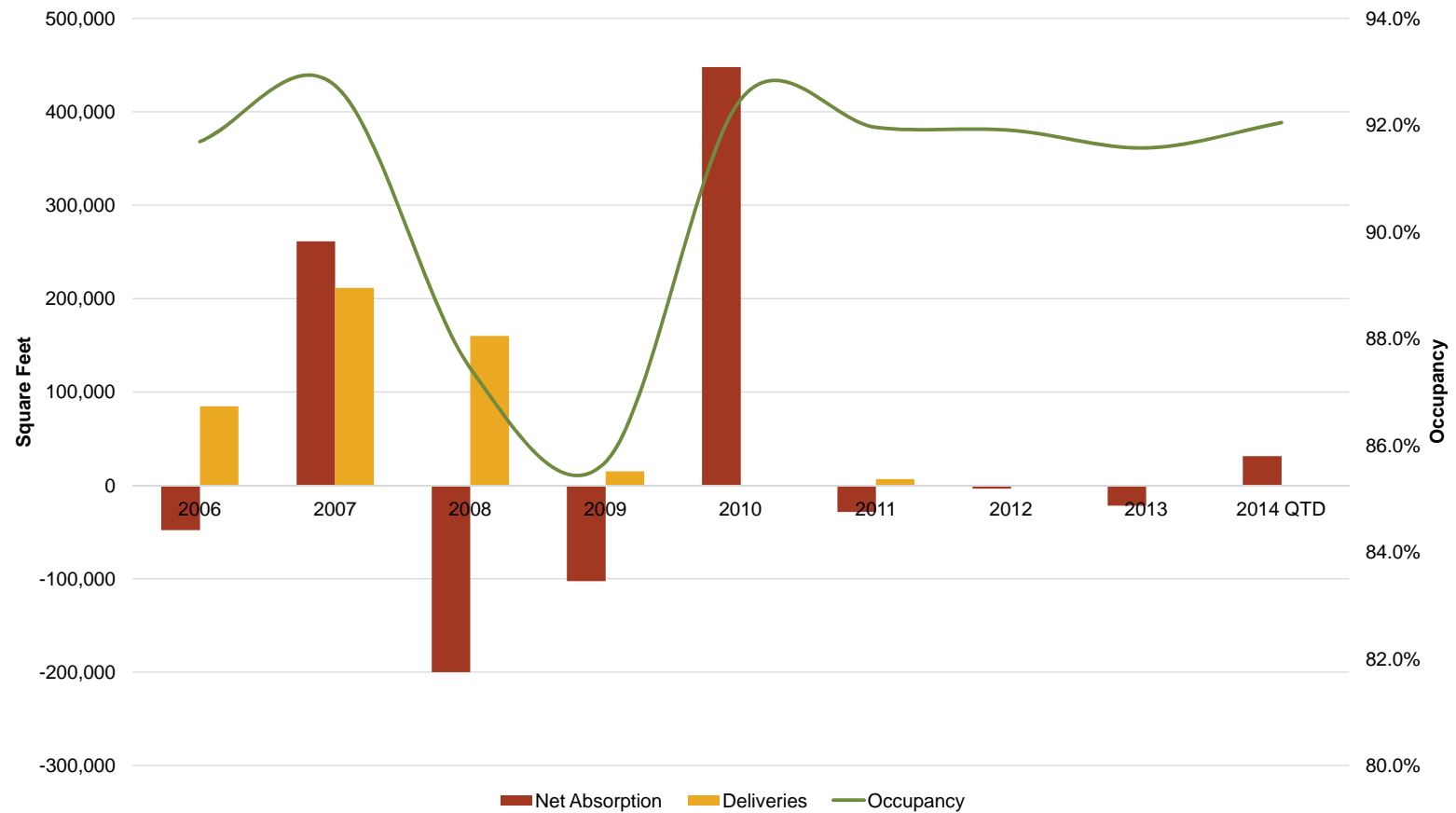


SOURCE: CoStar

# M-NCPPC

Exhibit I-21

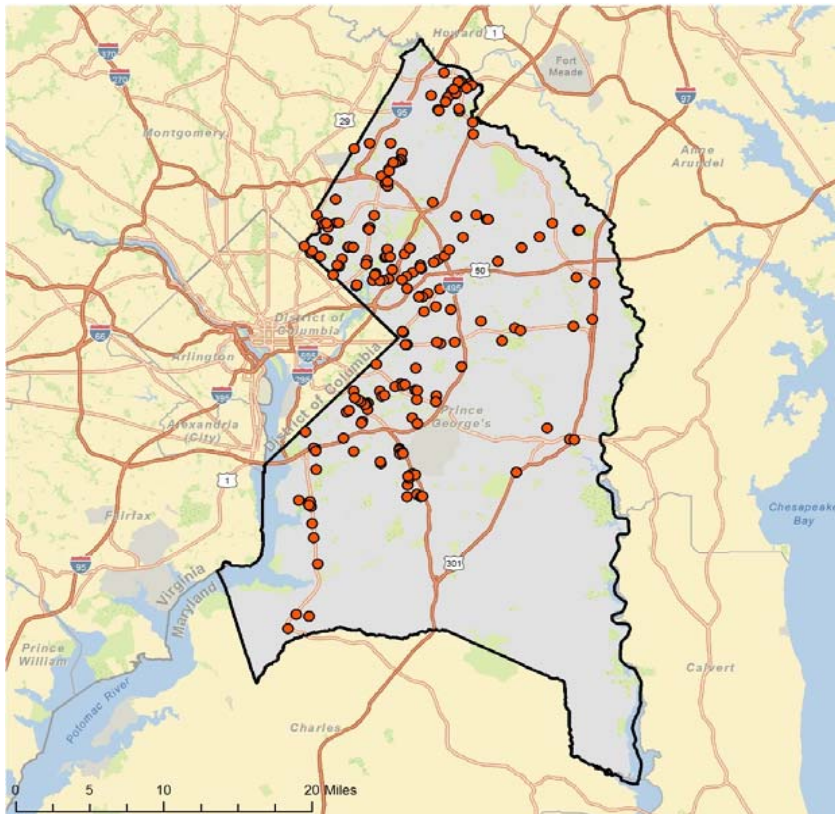
## COMMUNITY CENTER RETAIL - ABSORPTION, DELIVERIES, AND OCCUPANCY PRINCE GEORGE'S COUNTY, MD 2006-2014 QTD



SOURCE: CoStar

## Exhibit I-22

### NEIGHBORHOOD AND STRIP CENTER RETAIL LOCATIONS AND CURRENT PROPERTY STATISTICS PRINCE GEORGE'S COUNTY, MD 2014



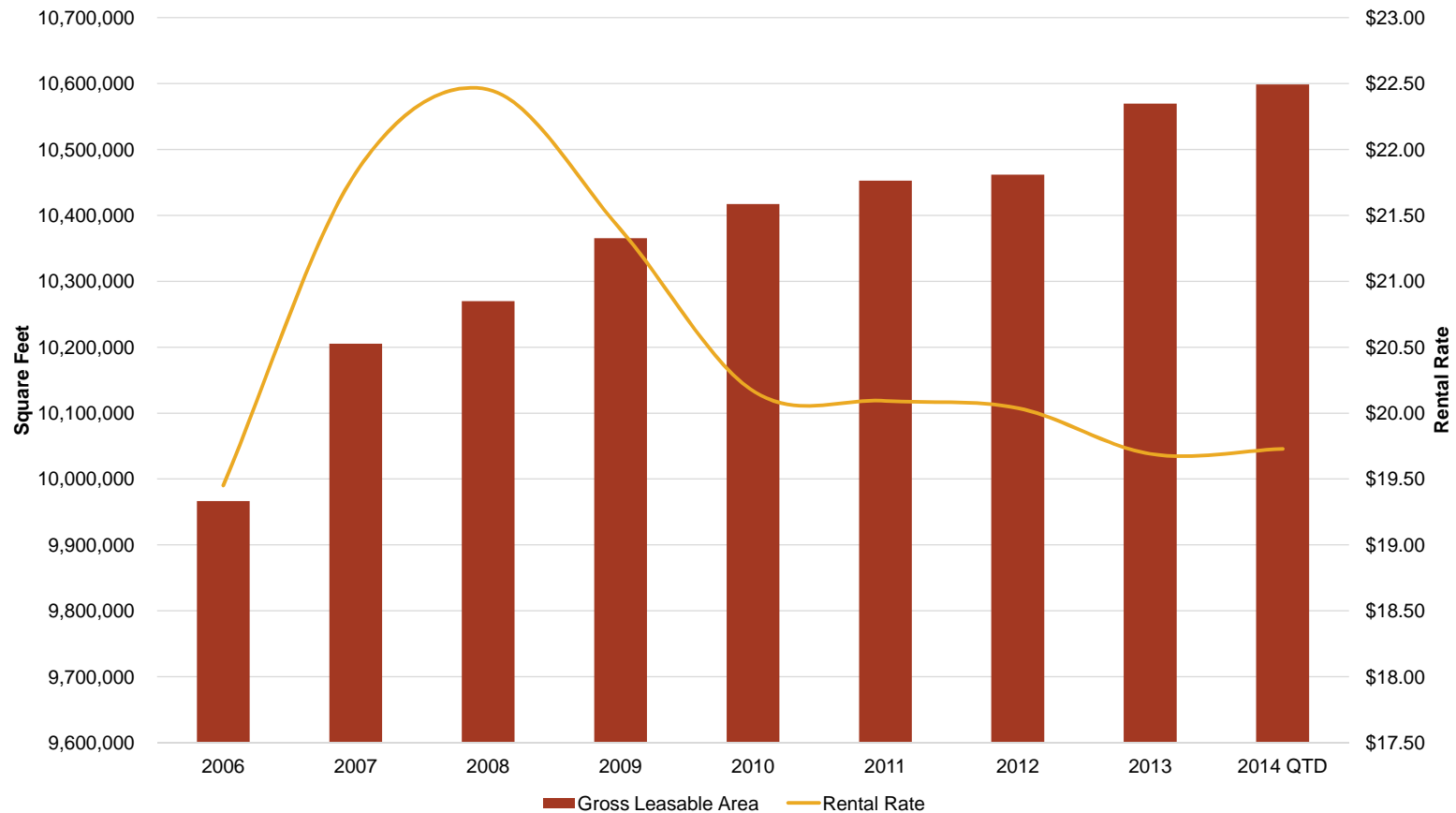
City	Number of Centers	Total GLA	Average Year Built	Grocery Anchored
Beltsville/Calverton	12	503,489	1981	2
Bowie	14	1,352,660	1989	3
Branch Avenue Corridor	33	1,008,319	1973	3
College Park	50	2,389,889	1965	12
Greater Upper Marlboro	4	400,663	1982	2
Greenbelt	5	458,977	1982	2
Landover/Largo/Captl Hts	23	1,192,890	1975	6
Lanham	6	622,031	1958	1
Laurel	21	1,321,375	1983	3
NatHbr/OxnHill/FtWash	17	961,640	1979	5
Pennsylvania Ave Corridor	13	689,045	1979	1

SOURCE: CoStar; Esri Business Analyst; RCLCO

# M-NCPPC

Exhibit I-23

**NEIGHBORHOOD AND STRIP CENTER RETAIL - INVENTORY AND AVERAGE RENTAL RATE  
PRINCE GEORGE'S COUNTY, MD  
2006-2014 QTD**

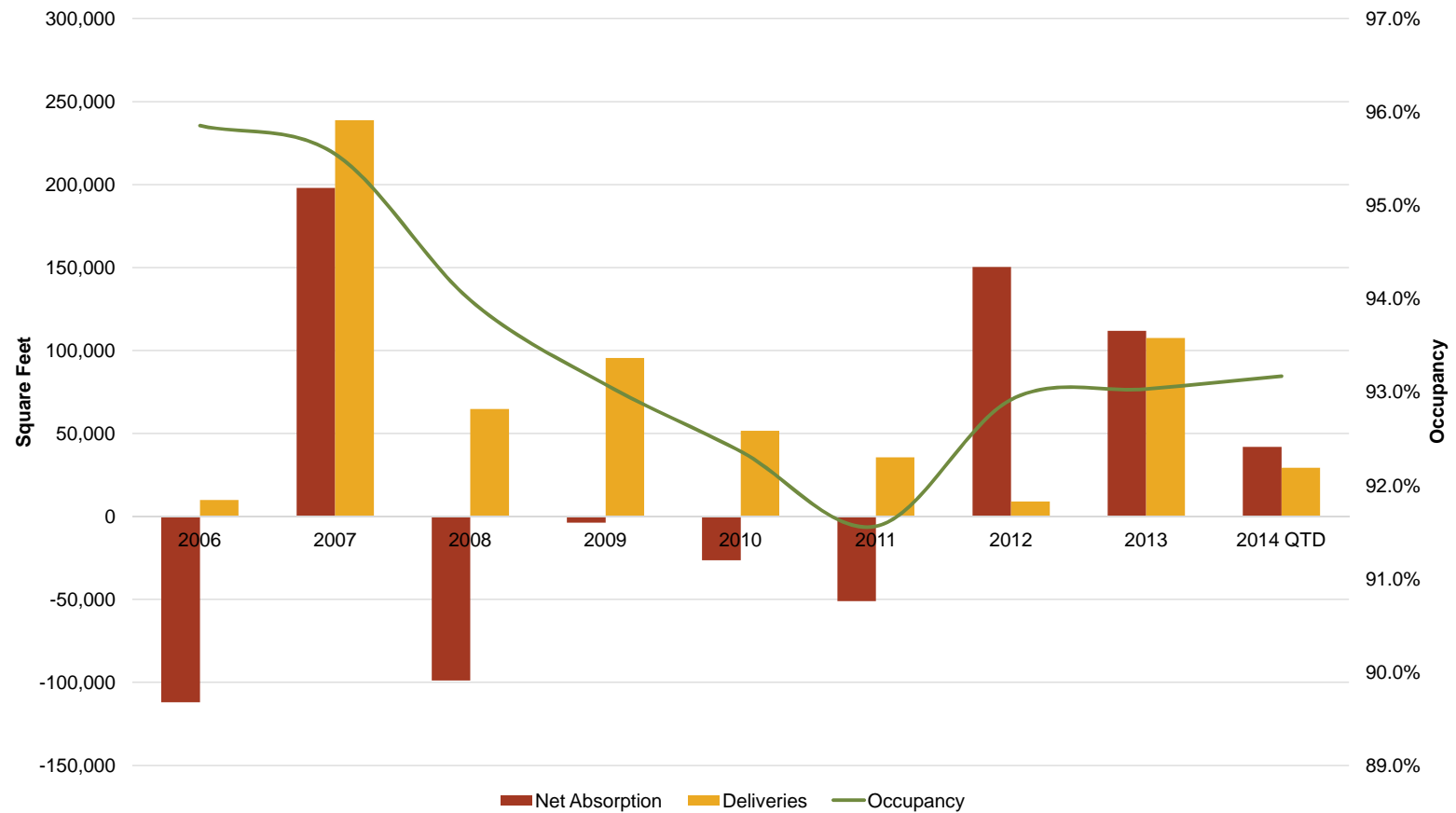


SOURCE: CoStar

# M-NCPPC

Exhibit I-24

## NEIGHBORHOOD AND STRIP CENTER RETAIL - ABSORPTION, DELIVERIES, AND OCCUPANCY PRINCE GEORGE'S COUNTY, MD 2006-2014 QTD



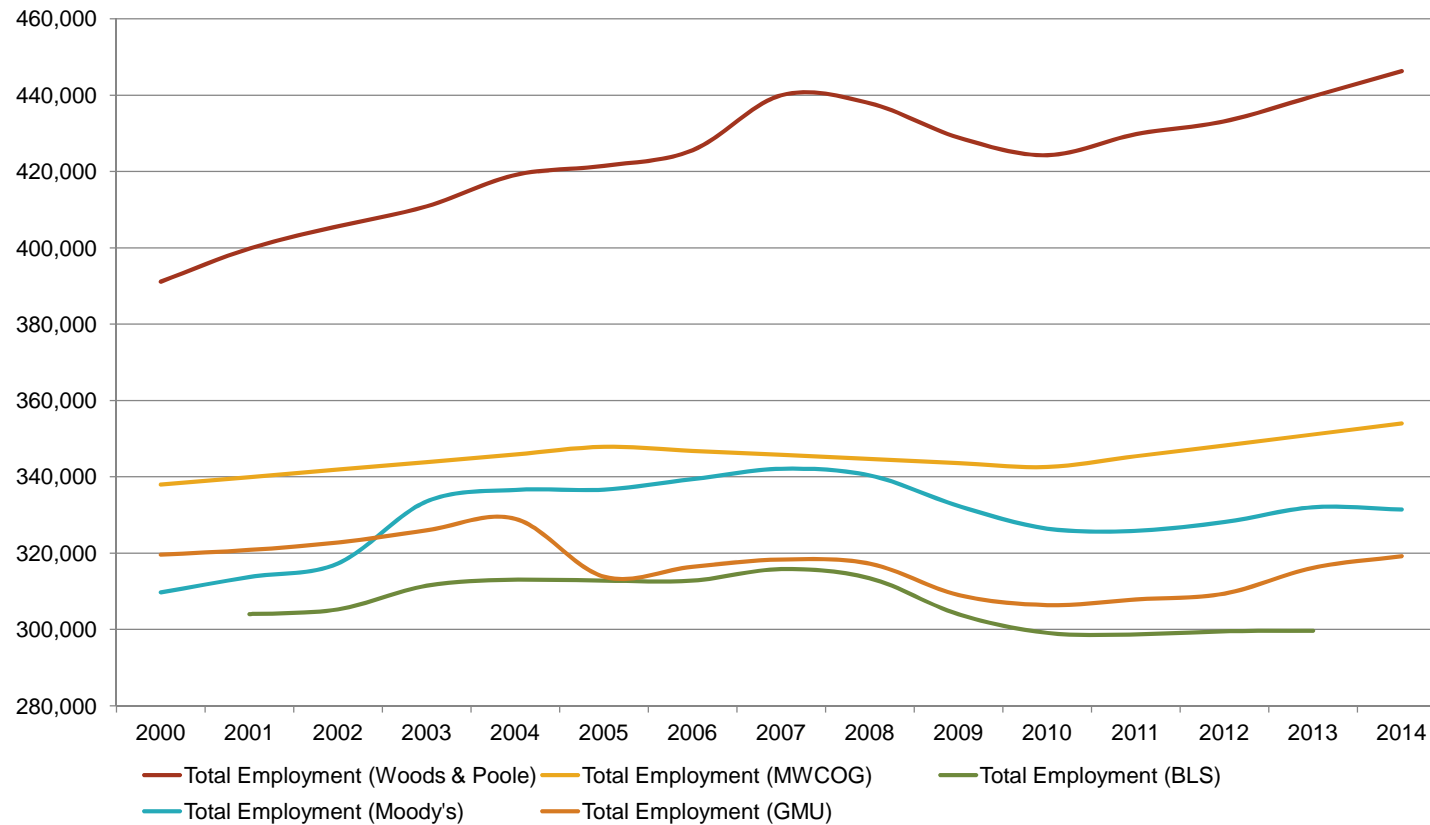
SOURCE: CoStar



## II. DEMAND ANALYSIS

*Exhibit II-1*

**HISTORICAL EMPLOYMENT  
PRINCE GEORGE'S COUNTY, MD  
2000-2014**



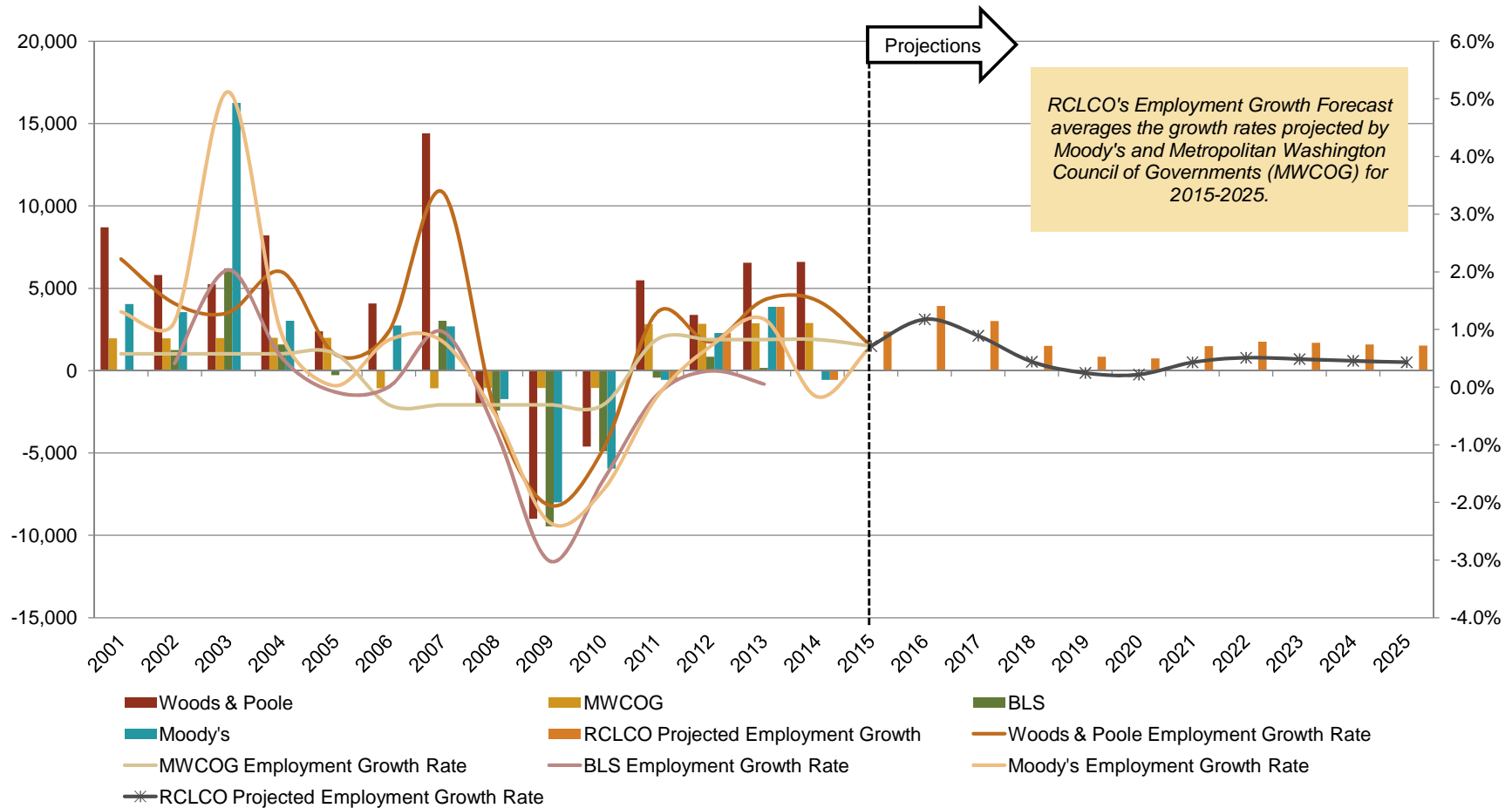
NOTE: Woods & Poole figures include proprietary employment and measure establishment-based employment as opposed to location-based employment; MWCOG growth rates are based on RCLCO calculated compounded annual growth rate

SOURCE: Woods & Poole; Metropolitan Washington Council of Governments; Bureau of Labor Statistics; Moody's Analytics; George Mason University Center for Regional Analysis

# M-NCPPC

Exhibit II-2

## HISTORICAL AND PROJECTED EMPLOYMENT GROWTH PRINCE GEORGE'S COUNTY, MD 2001-2025

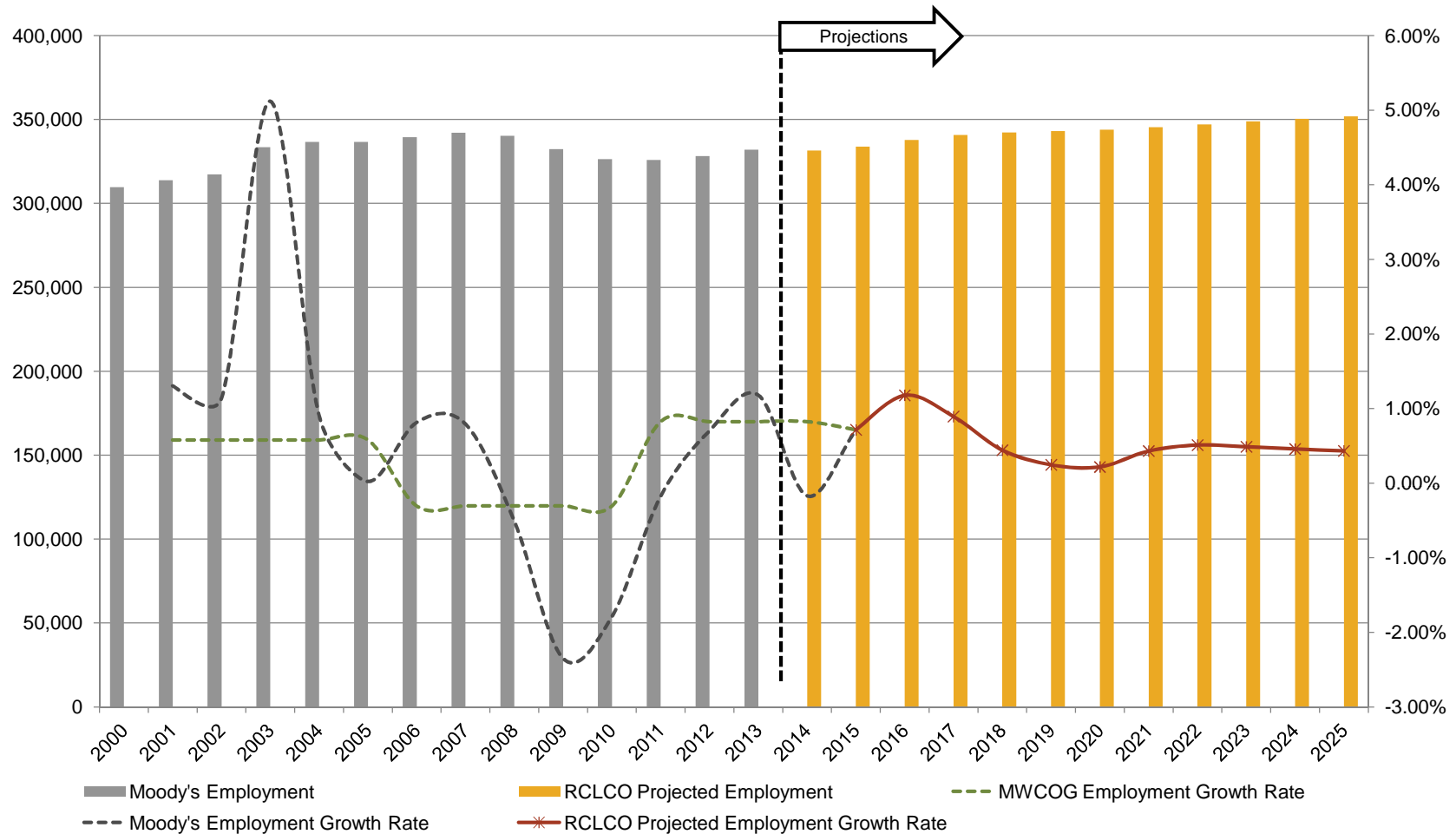


SOURCE: Woods & Poole; Metropolitan Washington Council of Governments; U.S. Bureau of Labor Statistics; Moody's Analytics; RCLCO

# M-NCPPC

Exhibit II-3

## HISTORICAL AND PROJECTED EMPLOYMENT PRINCE GEORGE'S COUNTY, MD 2000-2025

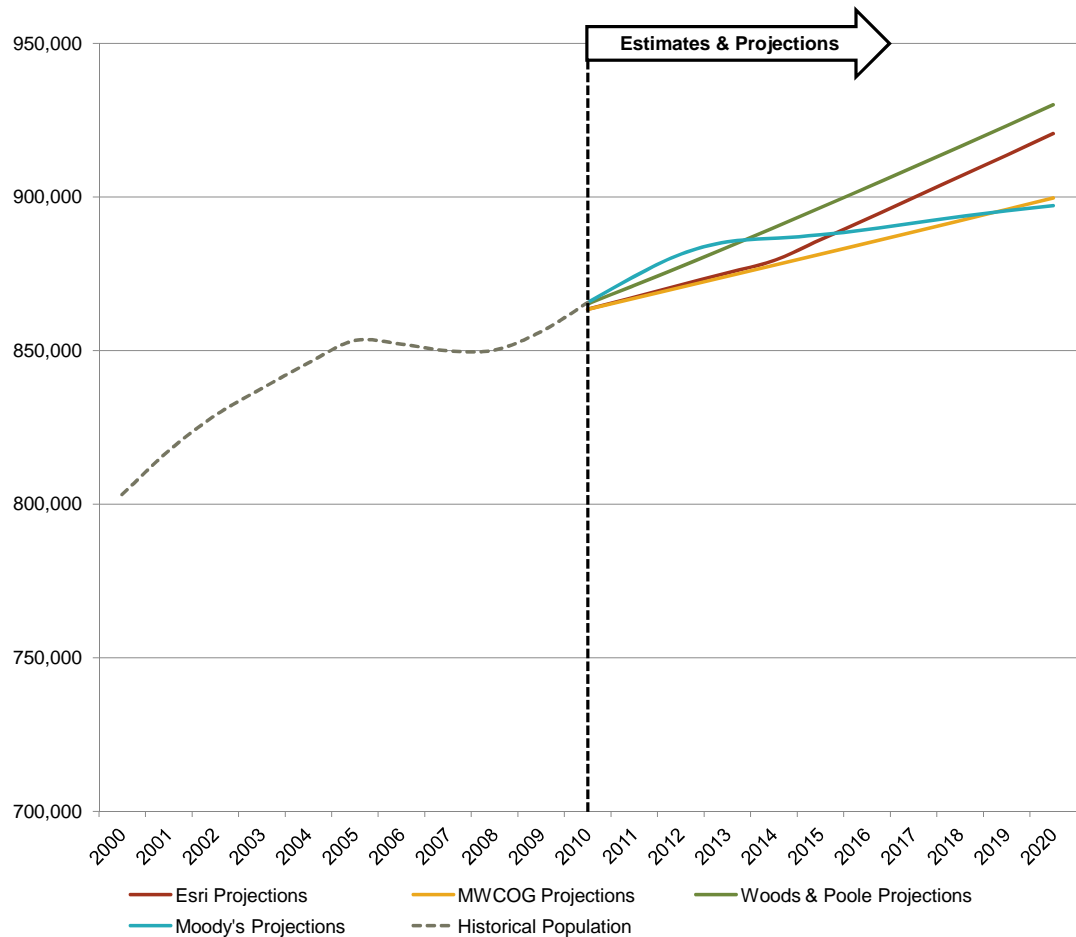


SOURCE: Moody's Economy; MWCOC; RCLCO

# M-NCPPC

Exhibit II-4

## HISTORICAL AND PROJECTED POPULATION PRINCE GEORGE'S COUNTY, MD 1990-2020



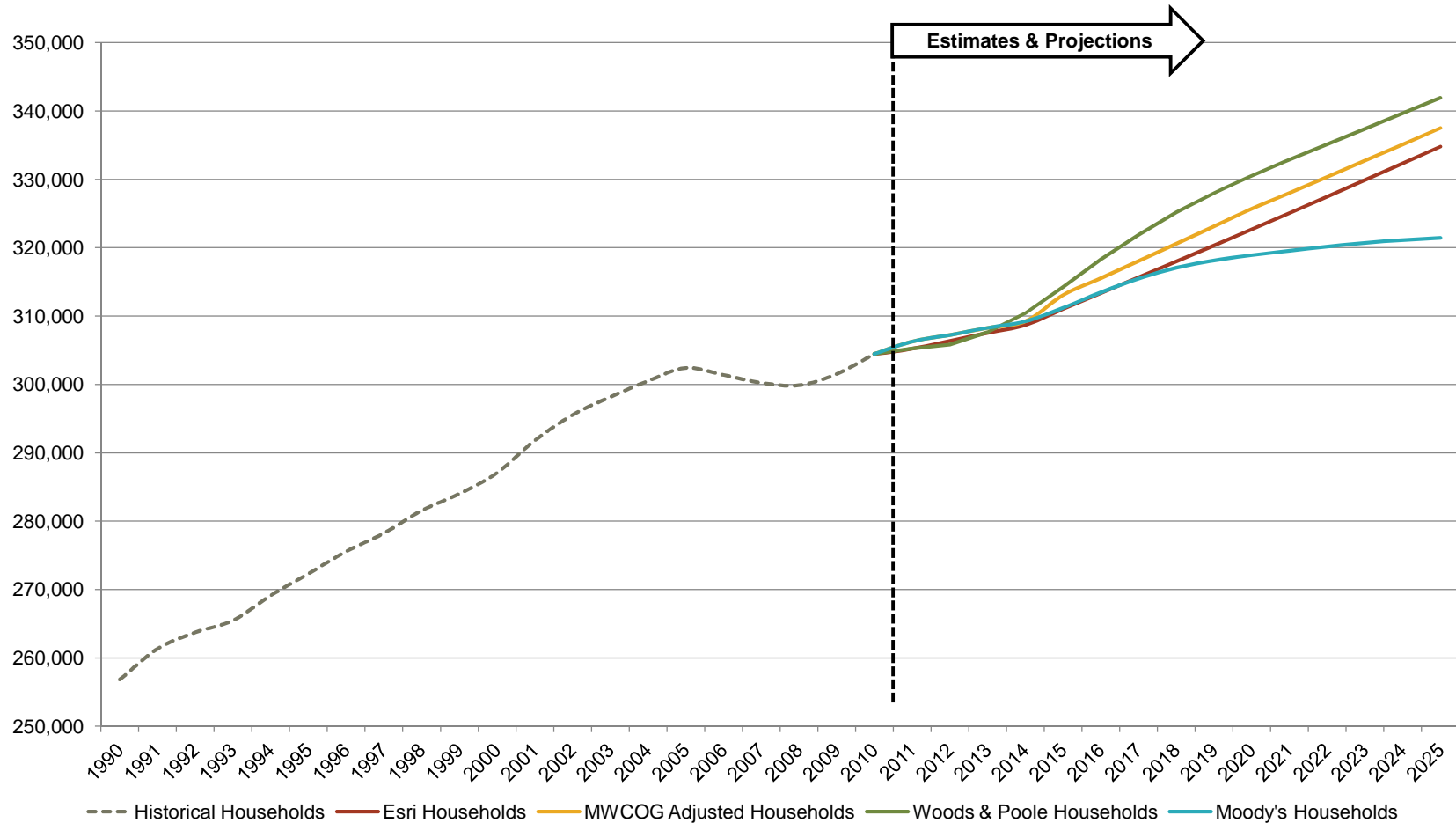
AVG. ANNUAL GROWTH					
	Historical	Moody's	W&P	Esri	MWCOG
1980-1990	6,021	--	--	--	--
1990-2000	7,722	--	--	--	--
2000-2010	6,250	--	--	--	--
2010-2015	--	4,433	6,265	4,529	3,592
2015-2020	--	1,892	6,700	6,907	3,667
2020-2025	--	1,873	6,869	N/A	5,406

SOURCE: Esri; Moody's Analytics; Woods & Poole; Metropolitan Washington Council of Governments

# M-NCPPC

Exhibit II-5

## HISTORICAL AND PROJECTED HOUSEHOLDS PRINCE GEORGE'S COUNTY, MD 1990-2025

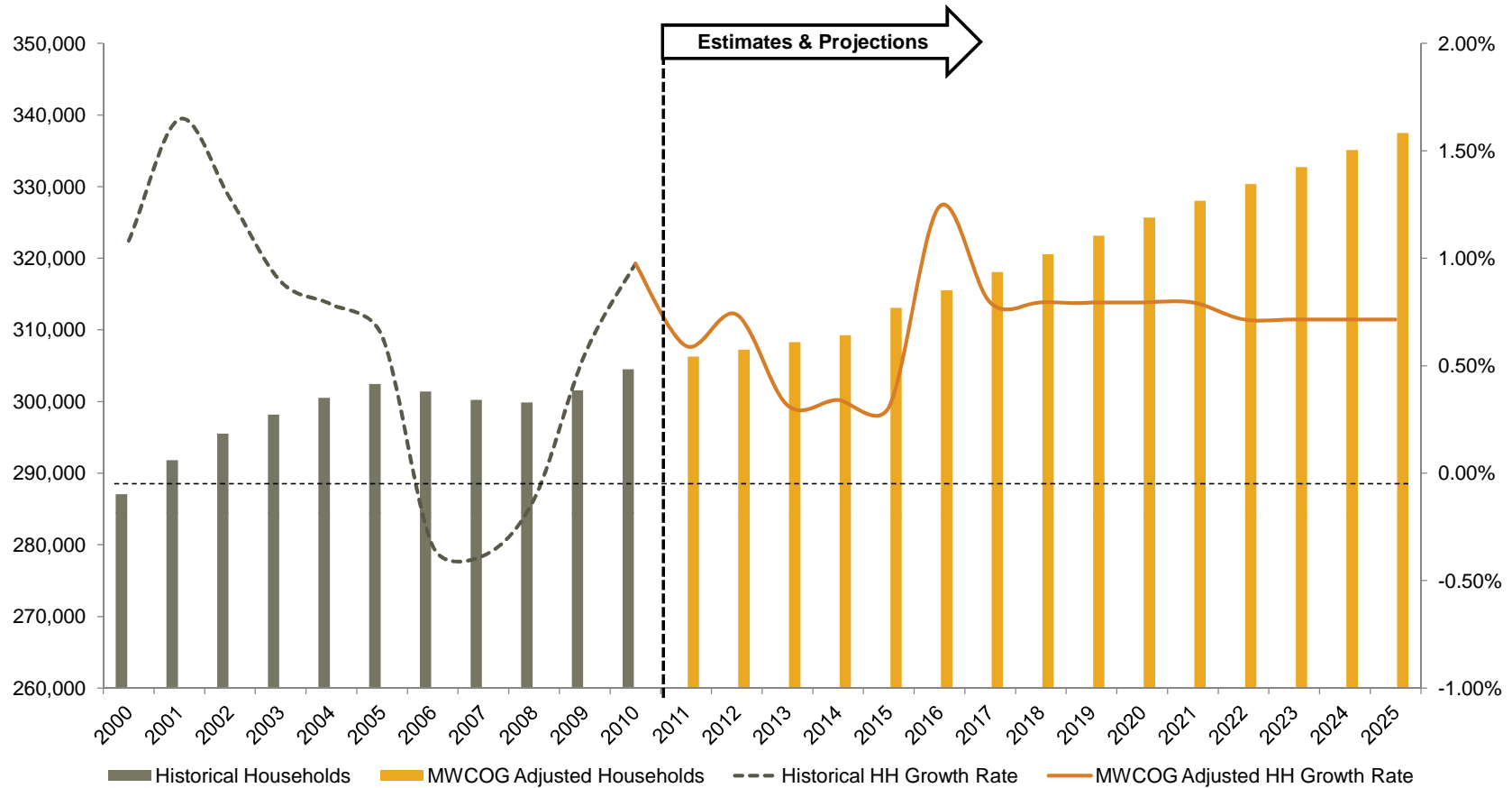


SOURCE: Esri; Moody's Analytics; Woods & Poole; Metropolitan Washington Council of Governments

# M-NCPPC

*Exhibit II-6*

## HISTORICAL AND PROJECTED HOUSEHOLDS AND GROWTH RATES PRINCE GEORGE'S COUNTY, MD 2000-2025



NOTE: The base year of MWCOG projections is 2010 - RCLCO adjusted the MWCOG projections to correspond with actual estimated households for 2011-2014. RCLCO uses the adjusted MWCOG projections for the duration of the retail study.

SOURCE: US Census; Moody's Economy; MWCOG; RCLCO

# M-NCPPC

## Exhibit II-7

### COUNTY COMPARISON OF SQUARE FEET OF RETAIL PER PERSON BALTIMORE-WASHINGTON REGION OCTOBER 2014

#### Shopping Centers Over 10,000 SF

	Prince George's County	Montgomery County	Anne Arundel County	Howard County	Fairfax County	Baltimore- Washington MSA
Total Retail SF	25,895,150	26,460,987	19,745,494	8,361,679	33,310,426	251,733,581
Occupied SF	24,395,677	25,430,729	18,736,174	8,070,871	32,301,023	237,918,961
Occupancy Rate	94.2%	96.1%	94.9%	96.5%	97.0%	94.5%
Population (2013)	871,533	1,003,571	554,262	301,881	1,112,266	8,634,007
Square Feet of Retail per Person	30	26	36	28	30	29
Retail-Related Sales Tax Revenue (FY 2013)	\$337,324,000	\$384,244,000	\$290,799,000	\$137,944,000	N/A	N/A
Total Sales Generated	\$5,622,066,667	\$6,404,066,667	\$4,846,650,000	\$2,299,066,667	N/A	N/A
Total Including Estimate of Non-Taxed Grocery Sales	\$7,222,066,667	\$8,204,066,667	\$6,246,650,000	\$3,199,066,667	N/A	N/A
Total Sales Generated per SF of Retail	\$296.04	\$322.60	\$333.40	\$396.37	N/A	N/A

#### Shopping Centers Over 25,000 SF

	Prince George's County	Montgomery County	Anne Arundel County	Howard County	Fairfax County	Baltimore- Washington MSA
Total Retail SF	24,772,079	25,435,471	18,976,767	7,814,712	32,384,186	229,126,049
Occupied SF	23,366,320	24,484,231	18,058,084	7,598,716	31,460,319	217,308,367
Occupancy Rate	94.3%	96.3%	95.2%	97.2%	97.1%	94.8%
Population (2013)	871,533	1,003,571	554,262	301,881	1,112,266	8,634,007
Square Feet of Retail per Person	28	25	34	26	29	27
Sales Tax Revenue (FY 2013)	\$337,324,000	\$384,244,000	\$290,799,000	\$137,944,000	N/A	N/A
Total Sales Generated	\$5,622,066,667	\$6,404,066,667	\$4,846,650,000	\$2,299,066,667	N/A	N/A
Total Including Estimate of Non-Taxed Grocery Sales	\$7,222,066,667	\$8,204,066,667	\$6,246,650,000	\$3,199,066,667	N/A	N/A
Total Sales Generated per SF of Retail	\$309.08	\$335.08	\$345.92	\$421.00	N/A	N/A

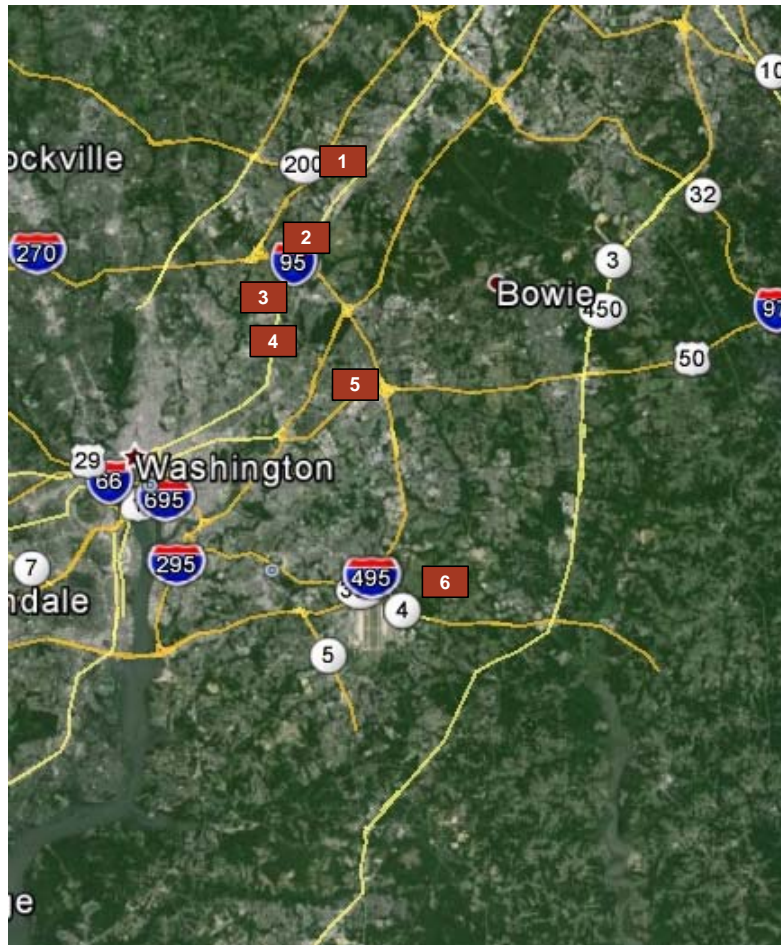
SOURCE: CoStar; RCLCO



# M-NCPPC

## Exhibit II-8

### PLANNED AND PROPOSED RETAIL PROJECTS IN PRINCE GEORGE'S COUNTY PRINCE GEORGE'S COUNTY, MD OCTOBER 2014



Under Construction				
	Project	Town	Square Feet of Space	Est. Delivery Date
1	Konterra Town Center East	Laurel	1,500,000	2015
2	Riverdale Park Station	College Park	168,000	2H 2015
3	Monument Village	College Park	4,800	1H 2016
4	Maryland Book Exchange	College Park	13,844	Fall 2015
5	Maryland DHCD Headquarters - Phase I	New Carrollton	65,000	06/2015
6	Westphalia Town Center - Phase I	Upper Marlboro	500,000	

Planned				
	Project	Town	Square Feet of Space	Est. Delivery Date
	Konterra Town Center West	Laurel		
	Wal-Mart at Duvall Village Shopping Center	Glenn Dale	77,916	
	Amber Ridge	Bowie	22,000	
	Terrapin Row	College Park	12,325	Fall 2016
	Metropolitan	College Park	4,133	
	College Park Place	College Park	23,615	
	Brentwood	Brentwood	6,350	
	Potomac Business Park	Oxon Hill	100,310	
	National Harbor Beltway Parcel	Oxon Hill	54,695	
	Streetsense Property	Mount Ranier	18,000	
	BeechTree Commercial Center	Upper Marlboro	300,000	
	Cabin Branch Village	Upper Marlboro	300,000	
	The Edwards Property	Adelphi	22,288	
	Maryland DHCD Headquarters - Phase I	New Carrollton	100,000	

Proposed				
	Project	Town	Square Feet of Space	Est. Delivery Date
	Osborne Shopping Center	Upper Marlboro	109,039	
	Steeplechase 95 Retail	Capitol Heights	8,647	
	Kiplinger Property	Hyattsville	34,000	
	Westside Retail Component	Laurel	200,000	

SOURCE: Konterra Realty; Petrie Ross; Washington Post; Washington Business Journal; University of Maryland; M-NCPPC; Google Earth

## Exhibit II-9

### SUMMARY OF STATISTICAL RETAIL DEMAND PRINCE GEORGE'S COUNTY, MD 2014-2025

EXPENDITURE TYPE	EXPENDITURES BY SOURCE					SUPPORTABLE RETAIL SF					TOTAL
	HOUSEHOLDS	NON-RESIDENT EMPLOYEES	VISITORS	SUBTOTAL	% OUTSIDE CAPTURE	TOTAL	HOUSEHOLDS	NON-RESIDENT EMPLOYEES	VISITORS	OUTSIDE CAPTURE	
<b>2014</b>											<b>2014</b>
Grocery & Drug	\$2,160,823,225	\$81,667,578		\$2,242,490,803	10%	\$2,466,739,884	5,402,058	204,169	--	560,623	6,166,850
General Merchandise/Department Stores	\$1,354,420,612	\$85,466,070		\$1,439,886,683	10%	\$1,583,875,351	3,386,052	240,801	--	359,972	3,986,824
Restaurant/Specialty Foods	\$984,260,159	\$157,406,493	\$567,200,000	\$1,708,866,652	10%	\$1,879,753,317	2,386,085	372,292	1,307,477	414,271	4,480,125
Boutique Soft Goods	\$449,484,247	\$49,043,433	\$388,400,000	\$886,927,680	10%	\$975,620,449	1,123,711	122,609	1,470,911	221,732	2,938,962
Home Goods	\$155,295,381	\$0		\$155,295,381	10%	\$170,824,919	443,701	0	--	44,370	488,071
Florist/Gift/Hobby	\$325,416,542	\$40,558,092		\$365,974,634	10%	\$402,572,097	897,701	112,894	--	100,959	1,111,553
Electronics	\$215,569,830	\$21,075,504		\$236,645,334	10%	\$260,309,868	538,925	52,689	--	59,161	650,775
Beer/Wine/Specialty	\$201,254,049	\$0		\$201,254,049	10%	\$221,379,454	447,231	0	--	44,723	491,954
Building/Lawn/Garden Stores	\$295,592,764	\$0		\$295,592,764	10%	\$325,152,040	985,309	0	--	98,531	1,083,840
Auto Parts, Accessories, and Tires	\$132,059,998	\$0		\$132,059,998	10%	\$145,265,998	440,200	0	--	44,020	484,220
Services	\$125,958,227	\$22,668,420		\$148,626,647	10%	\$163,489,312	314,896	56,671	--	37,157	408,723
<b>Supported Spending/SF</b>	<b>\$6,400,135,034</b>	<b>\$457,885,591</b>	<b>\$955,600,000</b>	<b>\$7,813,620,625</b>		<b>\$8,594,982,688</b>	<b>16,365,868</b>	<b>1,162,124</b>	<b>2,778,388</b>	<b>1,985,518</b>	<b>22,291,897</b>
Expenditure per Person or HH	\$24,491	\$2,342	\$107								-
<b>2020</b>											<b>2020</b>
Grocery & Drug	\$2,275,832,732	\$84,728,101		\$2,360,560,833	10%	\$2,596,616,916	5,689,582	211,820	--	590,140	6,491,542
General Merchandise/Department Stores	\$1,426,509,456	\$88,668,943		\$1,515,178,399	10%	\$1,666,696,238	3,566,274	249,825	--	378,795	4,194,893
Restaurant/Specialty Foods	\$1,036,647,266	\$163,305,359	\$733,006,117	\$1,932,958,741	10%	\$2,126,254,615	2,513,084	386,244	1,628,902	468,596	4,996,827
Boutique Soft Goods	\$473,407,982	\$50,881,354	\$733,006,117	\$1,257,295,453	10%	\$1,383,024,998	1,183,520	127,203	1,832,515	314,324	3,457,562
Home Goods	\$163,560,955	\$0		\$163,560,955	10%	\$179,917,051	467,317	0	--	46,732	514,049
Florist/Gift/Hobby	\$342,736,791	\$42,078,022		\$384,814,812	10%	\$423,296,294	945,481	117,124	--	106,156	1,168,761
Electronics	\$227,043,503	\$21,865,316		\$248,908,820	10%	\$273,799,702	567,609	54,663	--	62,227	684,499
Beer/Wine/Specialty	\$211,965,767	\$0		\$211,965,767	10%	\$233,162,344	471,035	0	--	47,104	518,139
Building/Lawn/Garden Stores	\$311,325,646	\$0		\$311,325,646	10%	\$342,458,211	1,037,752	0	--	103,775	1,141,527
Auto Parts, Accessories, and Tires	\$139,088,872	\$0		\$139,088,872	10%	\$152,997,760	463,630	0	--	46,363	509,993
Services	\$132,662,336	\$23,517,927		\$156,180,263	10%	\$171,798,289	331,656	58,795	--	39,045	429,496
<b>Supported SF</b>	<b>\$6,740,781,306</b>	<b>\$475,045,022</b>	<b>\$1,466,012,233</b>	<b>\$8,681,838,561</b>		<b>\$9,550,022,417</b>	<b>17,236,939</b>	<b>1,205,675</b>	<b>3,461,418</b>	<b>2,203,256</b>	<b>24,107,288</b>
Expenditure per Person or HH	\$24,491	\$2,342	\$107								-
<b>2025</b>											<b>2025</b>
Grocery & Drug	\$2,358,367,896	\$86,714,438		\$2,445,082,334	10%	\$2,689,590,567	5,895,920	216,786	--	611,271	6,723,976
General Merchandise/Department Stores	\$1,478,243,131	\$90,747,667		\$1,568,990,798	10%	\$1,725,889,878	3,695,608	255,682	--	392,248	4,343,537
Restaurant/Specialty Foods	\$1,074,242,231	\$167,133,834	\$880,356,514	\$2,121,732,578	10%	\$2,333,905,836	2,604,224	395,299	1,956,348	514,359	5,470,230
Boutique Soft Goods	\$490,576,557	\$52,074,199	\$880,356,514	\$1,423,007,270	10%	\$1,565,307,997	1,226,441	130,185	2,200,891	355,752	3,913,270
Home Goods	\$169,492,643	\$0		\$169,492,643	10%	\$186,441,908	484,265	0	--	48,426	532,691
Florist/Gift/Hobby	\$355,166,455	\$43,064,484		\$398,230,940	10%	\$438,054,033	979,770	119,870	--	109,857	1,209,496
Electronics	\$235,277,445	\$22,377,919		\$257,655,364	10%	\$283,420,900	588,194	55,945	--	64,414	708,552
Beer/Wine/Specialty	\$219,652,900	\$0		\$219,652,900	10%	\$241,618,190	488,118	0	--	48,812	536,929
Building/Lawn/Garden Stores	\$322,616,157	\$0		\$322,616,157	10%	\$354,877,773	1,075,387	0	--	107,539	1,182,926
Auto Parts, Accessories, and Tires	\$144,133,058	\$0		\$144,133,058	10%	\$158,546,364	480,444	0	--	48,044	528,488
Services	\$137,473,457	\$24,069,274		\$161,542,731	10%	\$177,697,004	343,684	60,173	--	40,386	444,243
<b>Supported SF</b>	<b>\$6,985,241,930</b>	<b>\$486,181,815</b>	<b>\$1,760,713,027</b>	<b>\$9,232,136,773</b>		<b>\$10,155,350,450</b>	<b>17,862,052</b>	<b>1,233,941</b>	<b>4,157,239</b>	<b>2,341,107</b>	<b>25,594,339</b>
Expenditure per Person or HH	\$24,491	\$2,342	\$107								-

## Exhibit II-9

### SUMMARY OF STATISTICAL RETAIL DEMAND PRINCE GEORGE'S COUNTY, MD 2014-2025

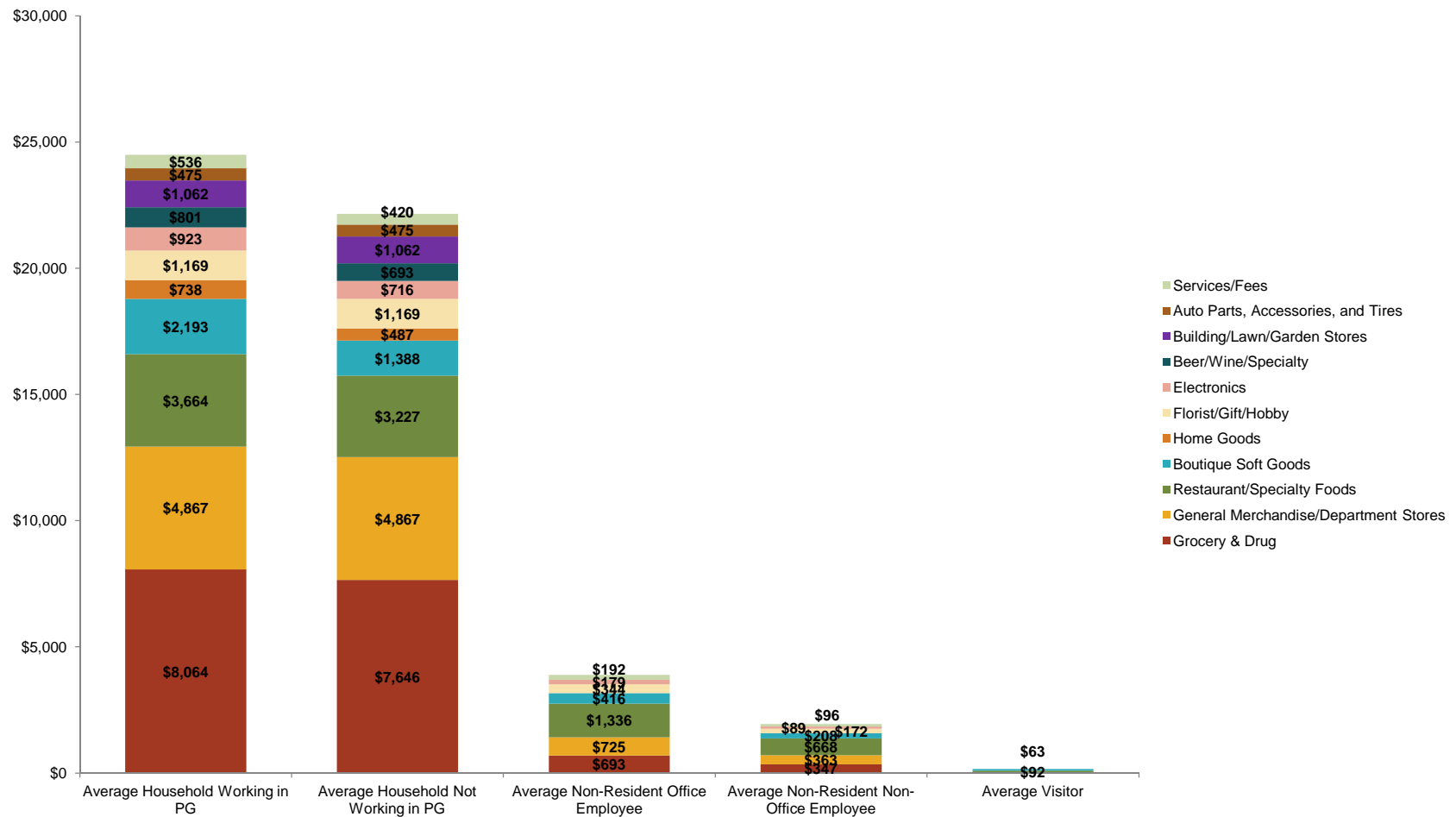
EXPENDITURE TYPE	EXPENDITURES BY SOURCE						SUPPORTABLE RETAIL SF				
	HOUSEHOLDS	NON-RESIDENT EMPLOYEES	VISITORS	SUBTOTAL	% OUTSIDE CAPTURE	TOTAL	HOUSEHOLDS	NON- RESIDENT EMPLOYEES	VISITORS	OUTSIDE CAPTURE	TOTAL
<b>Additional Supportable Space by 2025</b>											<b>2014-2025</b>
Grocery & Drug	\$197,544,671	\$5,046,859	\$0	\$202,591,530	10%	\$222,850,683	493,862	12,617	--	50,648	557,127
General Merchandise/Department Stores	\$123,822,519	\$5,281,597	\$0	\$129,104,116	10%	\$142,014,527	309,556	14,881	--	32,276	356,713
Restaurant/Specialty Foods	\$89,982,071	\$9,727,341	\$313,156,514	\$412,865,926	10%	\$454,152,519	218,138	23,007	648,871	100,089	990,105
Boutique Soft Goods	\$41,092,310	\$3,030,766	\$491,956,514	\$536,079,589	10%	\$589,687,548	102,731	7,577	729,980	134,020	974,308
Home Goods	\$14,197,263	\$0	\$0	\$14,197,263	10%	\$15,616,989	40,564	0	--	4,056	44,620
Florist/Gift/Hobby	\$29,749,913	\$2,506,392	\$0	\$32,256,306	10%	\$35,481,936	82,069	6,977	--	8,898	97,944
Electronics	\$19,707,615	\$1,302,415	\$0	\$21,010,030	10%	\$23,111,033	49,269	3,256	--	5,253	57,778
Beer/Wine/Specialty	\$18,398,851	\$0	\$0	\$18,398,851	10%	\$20,238,736	40,886	0	--	4,089	44,975
Building/Lawn/Garden Stores	\$27,023,393	\$0	\$0	\$27,023,393	10%	\$29,725,732	90,078	0	--	9,008	99,086
Auto Parts, Accessories, and Tires	\$12,073,060	\$0	\$0	\$12,073,060	10%	\$13,280,366	40,244	0	--	4,024	44,268
Services	\$11,515,230	\$1,400,854	\$0	\$12,916,084	10%	\$14,207,692	28,788	3,502	--	3,229	35,519
<b>Supported SF</b>	<b>\$585,106,896</b>	<b>\$28,296,224</b>	<b>\$805,113,027</b>	<b>\$1,418,516,148</b>		<b>\$1,560,367,762</b>	<b>1,496,184</b>	<b>71,816</b>	<b>1,378,851</b>	<b>355,589</b>	<b>3,302,442</b>

SOURCE: RCLCO; ICSC; State of Maryland; Esri

# M-NCPPC

Exhibit II-10

## AVERAGE SPENDING PER HOUSEHOLD, EMPLOYEE, AND VISITOR PRINCE GEORGE'S COUNTY, MD 2014

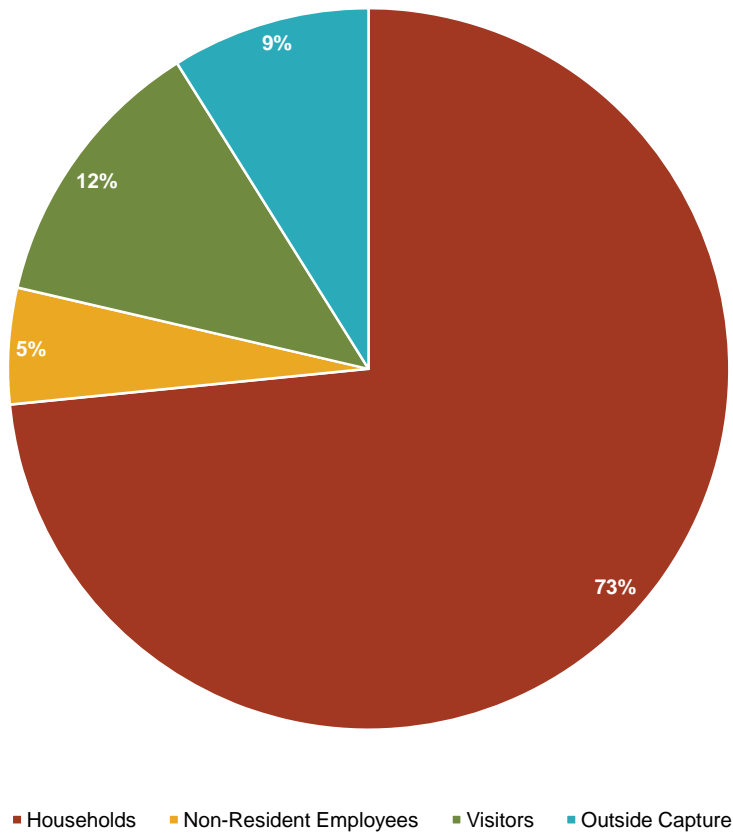


SOURCE: Esri; ICSC

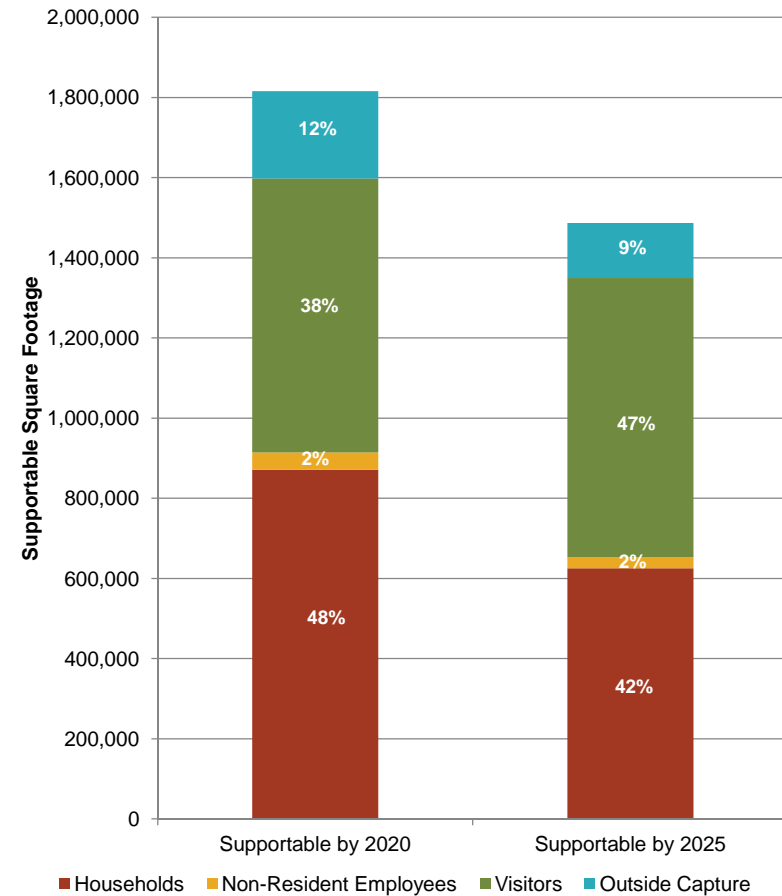
Exhibit II-11

## RETAIL DEMAND BY CONSUMER MARKET PRINCE GEORGE'S COUNTY, MD 2013-2023

Distribution of Demand by Consumer Market, 2014



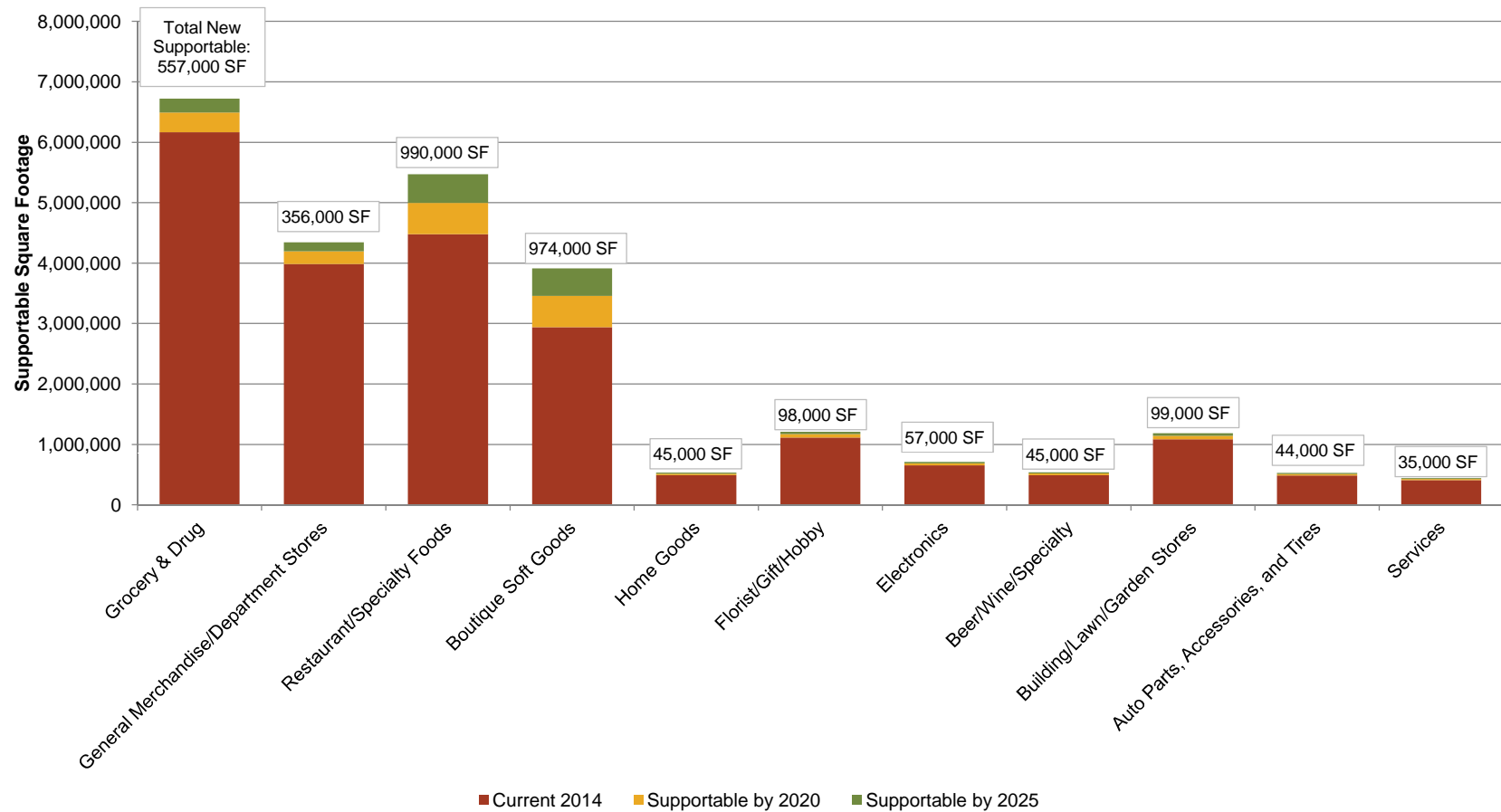
Retail Square Footage Growth, 2020 and 2025



SOURCE: RCLCO

*Exhibit II-12*

**RETAIL DEMAND BY TYPE OF RETAIL  
PRINCE GEORGE'S COUNTY, MD  
2013-2023**



SOURCE: RCLCO

## Exhibit II-13

### RETAIL DEMAND FROM HOUSEHOLDS IN PRINCE GEORGE'S COUNTY PRINCE GEORGE'S COUNTY, MD 2020-2025

		2014	2020	2025
Total Households <sup>1</sup>		309,238	325,697	337,509
Households that Work in the County <sup>2</sup>	28.20%	87,205	91,847	95,177
Households that Work outside the County	71.80%	222,033	233,850	242,331

STORE TYPE	PER HH <sup>3</sup>	COUNTY CAPTURE	ANNUAL RETAIL EXPENDITURES			SALES/SF THRESHOLD <sup>4</sup>	TOTAL RETAIL SPACE DEMANDED		
			2014	2020	2025		2014	2020	2025
Automobile Dealers	\$5,382	90%	\$1,497,965,977	\$1,497,965,977	\$1,497,965,977	\$300	4,993,220	4,993,220	4,993,220
Other Motor Vehicle Dealers	\$397	90%	\$110,394,562	\$110,394,562	\$110,394,562	\$300	367,982	367,982	367,982
Auto Parts, Accessories, and Tire Stores	\$475	90%	\$132,059,998	\$132,059,998	\$132,059,998	\$300	440,200	440,200	440,200
Furniture Stores	\$416	90%	\$115,776,353	\$115,776,353	\$115,776,353	\$350	330,790	330,790	330,790
Home Furnishings Stores	\$322	90%	\$89,635,572	\$89,635,572	\$89,635,572	\$350	256,102	256,102	256,102
Electronics & Appliance Stores	\$923	90%	\$257,015,367	\$257,015,367	\$257,015,367	\$400	642,538	642,538	642,538
Building Material and Supplies Dealers	\$912	90%	\$253,691,855	\$253,691,855	\$253,691,855	\$300	845,640	845,640	845,640
Lawn and Garden Equipment and Supplies Stores	\$151	90%	\$41,900,909	\$41,900,909	\$41,900,909	\$300	139,670	139,670	139,670
Grocery Stores	\$5,664	90%	\$1,576,233,541	\$1,576,233,541	\$1,576,233,541	\$400	3,940,584	3,940,584	3,940,584
Specialty Food Stores	\$149	90%	\$41,548,850	\$41,548,850	\$41,548,850	\$450	92,331	92,331	92,331
Beer, Wine, and Liquor Stores	\$651	90%	\$181,241,853	\$181,241,853	\$181,241,853	\$450	402,760	402,760	402,760
Health & Personal Care Stores (drugstore)	\$2,400	90%	\$668,044,217	\$668,044,217	\$668,044,217	\$400	1,670,111	1,670,111	1,670,111
Gasoline Stations	\$3,069	90%	\$854,231,128	\$854,231,128	\$854,231,128	\$750	1,138,975	1,138,975	1,138,975
Clothing Stores	\$1,583	90%	\$440,504,451	\$440,504,451	\$440,504,451	\$400	1,101,261	1,101,261	1,101,261
Shoe Stores	\$314	90%	\$87,340,523	\$87,340,523	\$87,340,523	\$400	218,351	218,351	218,351
Jewelry, Luggage, and Leather Goods Stores	\$296	90%	\$82,489,952	\$82,489,952	\$82,489,952	\$400	206,225	206,225	206,225
Sporting Goods/Hobby/Musical Instrument Stores	\$695	90%	\$193,464,161	\$193,464,161	\$193,464,161	\$400	483,660	483,660	483,660
Book, Periodical, and Music Stores	\$198	90%	\$54,967,998	\$54,967,998	\$54,967,998	\$350	157,051	157,051	157,051
Department Stores Excluding Leased Depts.	\$2,612	90%	\$726,842,726	\$726,842,726	\$726,842,726	\$400	1,817,107	1,817,107	1,817,107
Other General Merchandise Stores	\$2,255	90%	\$627,577,887	\$627,577,887	\$627,577,887	\$400	1,568,945	1,568,945	1,568,945
Florists	\$47	90%	\$13,025,687	\$13,025,687	\$13,025,687	\$350	37,216	37,216	37,216
Office Supplies, Stationery, and Gift Stores	\$230	90%	\$63,958,695	\$63,958,695	\$63,958,695	\$350	182,739	182,739	182,739
Used Merchandise Stores	\$121	90%	\$33,742,273	\$33,742,273	\$33,742,273	\$300	112,474	112,474	112,474
Other Miscellaneous Store Retailers	\$563	90%	\$156,718,019	\$156,718,019	\$156,718,019	\$300	522,393	522,393	522,393
Full-Service Restaurants	\$1,718	95%	\$504,770,728	\$504,770,728	\$504,770,728	\$450	1,121,713	1,121,713	1,121,713
Limited-Service Eating Places	\$1,487	95%	\$436,738,606	\$436,738,606	\$436,738,606	\$400	1,091,847	1,091,847	1,091,847
Special Food Services (NAICS 7223)	\$183	95%	\$53,825,796	\$53,825,796	\$53,825,796	\$350	153,788	153,788	153,788
Drinking Places - Alcoholic Beverages	\$276	95%	\$81,113,177	\$81,113,177	\$81,113,177	\$450	180,252	180,252	180,252
Services/Fees <sup>5</sup>	\$536	90%	\$149,122,651	\$149,122,651	\$149,122,651	\$400	372,807	372,807	372,807
<b>TOTAL</b>	<b>\$34,024</b>		<b>\$9,525,943,511</b>	<b>\$9,525,943,511</b>	<b>\$9,525,943,511</b>	<b>\$384</b>	<b>24,588,729</b>	<b>24,588,729</b>	<b>24,588,729</b>

## Exhibit II-13

### RETAIL DEMAND FROM HOUSEHOLDS IN PRINCE GEORGE'S COUNTY PRINCE GEORGE'S COUNTY, MD 2020-2025

		2014	2020	2025
Total Households <sup>1</sup>		309,238	325,697	337,509
Households that Work in the County <sup>2</sup>	28.20%	87,205	91,847	95,177
Households that Work outside the County	71.80%	222,033	233,850	242,331

STORE TYPE	PER HH <sup>3</sup>	COUNTY CAPTURE	ANNUAL RETAIL EXPENDITURES			SALES/SF THRESHOLD <sup>4</sup>	TOTAL RETAIL SPACE DEMANDED		
			2014	2020	2025		2014	2020	2025
Summary of Demand from Households in County that also Work in County									
	28.2%		87,205	91,847	95,177				
Grocery & Drug	\$8,064	90%	\$632,886,328	\$666,571,612	\$690,745,444	\$400	1,582,216	1,666,429	1,726,864
General Merchandise/Department Stores	\$4,867	90%	\$381,946,613	\$402,275,667	\$416,864,563	\$400	954,867	1,005,689	1,042,161
Restaurant/Specialty Foods	\$3,664	95%	\$303,558,422	\$319,715,276	\$331,310,044	\$413	735,899	775,067	803,176
Boutique Soft Goods	\$2,193	90%	\$172,114,449	\$181,275,216	\$187,849,328	\$400	430,286	453,188	469,623
Home Goods	\$738	90%	\$57,926,163	\$61,009,275	\$63,221,832	\$350	165,503	174,312	180,634
Florist/Gift/Hobby	\$1,169	90%	\$91,767,465	\$96,651,775	\$100,156,940	\$363	253,152	266,626	276,295
Electronics	\$923	90%	\$72,478,334	\$76,335,983	\$79,104,377	\$400	181,196	190,840	197,761
Beer/Wine/Specialty	\$801	90%	\$62,826,978	\$66,170,935	\$68,570,685	\$450	139,616	147,047	152,379
Building/Lawn/Garden Stores	\$1,062	90%	\$83,357,159	\$87,793,832	\$90,977,756	\$300	277,857	292,646	303,259
Auto Parts, Accessories, and Tires	\$475	90%	\$37,240,919	\$39,223,062	\$40,645,522	\$300	124,136	130,744	135,485
Services/Fees	\$536	90%	\$42,052,588	\$44,290,831	\$45,897,078	\$400	105,131	110,727	114,743
TOTAL DEMAND POTENTIAL	\$24,491		\$1,938,155,418	\$2,041,313,463	\$2,115,343,570		4,949,859	5,213,315	5,402,380
Additional Supportable SF Demand								263,456	189,066
Summary of Demand from Households in County that Work Elsewhere									
	71.8%		222,033	233,850	242,331				
Grocery & Drug	\$7,646	90%	\$1,527,936,897	\$1,609,261,119.89	\$1,667,622,452.29	\$400	3,819,842	4,023,153	4,169,056
General Merchandise/Department Stores	\$4,867	90%	\$972,474,000	\$1,024,233,789.26	\$1,061,378,568.24	\$400	2,431,185	2,560,584	2,653,446
Restaurant/Specialty Foods	\$3,227	95%	\$680,701,737	\$716,931,989.46	\$742,932,186.46	\$413	1,650,186	1,738,017	1,801,048
Boutique Soft Goods	\$1,388	90%	\$277,369,798	\$292,132,766.01	\$302,727,229.05	\$400	693,424	730,332	756,818
Home Goods	\$487	90%	\$97,369,218	\$102,551,680.42	\$106,270,811.29	\$350	278,198	293,005	303,631
Florist/Gift/Hobby	\$1,169	90%	\$233,649,077	\$246,085,015.73	\$255,009,514.82	\$363	644,549	678,855	703,475
Electronics	\$716	90%	\$143,091,497	\$150,707,520.99	\$156,173,067.64	\$400	357,729	376,769	390,433
Beer/Wine/Specialty	\$693	90%	\$138,427,071	\$145,794,831.83	\$151,082,215.29	\$450	307,616	323,989	335,738
Building/Lawn/Garden Stores	\$1,062	90%	\$212,235,604	\$223,531,814.14	\$231,638,400.67	\$300	707,452	745,106	772,128
Auto Parts, Accessories, and Tires	\$475	90%	\$94,819,079	\$99,865,810.42	\$103,487,535.75	\$300	316,064	332,886	344,958
Services/Fees	\$420	90%	\$83,905,639	\$88,371,504.98	\$91,576,378.76	\$400	209,764	220,929	228,941
TOTAL DEMAND POTENTIAL	\$22,150		\$4,461,979,616	\$4,699,467,843	\$4,869,898,360		11,416,009	12,023,624	12,459,672
Additional Supportable SF Demand								607,615	436,048



## Exhibit II-13

### RETAIL DEMAND FROM HOUSEHOLDS IN PRINCE GEORGE'S COUNTY PRINCE GEORGE'S COUNTY, MD 2020-2025

		2014	2020	2025
Total Households <sup>1</sup>		309,238	325,697	337,509
Households that Work in the County <sup>2</sup>	28.20%	87,205	91,847	95,177
Households that Work outside the County	71.80%	222,033	233,850	242,331

STORE TYPE	PER HH <sup>3</sup>	COUNTY CAPTURE	ANNUAL RETAIL EXPENDITURES			SALES/SF THRESHOLD <sup>4</sup>	TOTAL RETAIL SPACE DEMANDED		
			2014	2020	2025		2014	2020	2025
Total Demand from Households									
Grocery & Drug	\$7,764		\$2,160,823,225	\$2,275,832,732	\$2,358,367,896		5,402,058	5,689,582	5,895,920
General Merchandise/Department Stores	\$4,867		\$1,354,420,612	\$1,426,509,456	\$1,478,243,131		3,386,052	3,566,274	3,695,608
Restaurant/Specialty Foods	\$3,350		\$984,260,159	\$1,036,647,266	\$1,074,242,231		2,386,085	2,513,084	2,604,224
Boutique Soft Goods	\$1,615		\$449,484,247	\$473,407,982	\$490,576,557		1,123,711	1,183,520	1,226,441
Home Goods	\$558		\$155,295,381	\$163,560,955	\$169,492,643		443,701	467,317	484,265
Florist/Gift/Hobby	\$1,169		\$325,416,542	\$342,736,791	\$355,166,455		897,701	945,481	979,770
Electronics	\$775		\$215,569,830	\$227,043,503	\$235,277,445		538,925	567,609	588,194
Beer/Wine/Specialty	\$723		\$201,254,049	\$211,965,767	\$219,652,900		447,231	471,035	488,118
Building/Lawn/Garden Stores	\$1,062		\$295,592,764	\$311,325,646	\$322,616,157		985,309	1,037,752	1,075,387
Auto Parts, Accessories, and Tires	\$475		\$132,059,998	\$139,088,872	\$144,133,058		440,200	463,630	480,444
Services/Fees	\$453		\$125,958,227	\$132,662,336	\$137,473,457		314,896	331,656	343,684
TOTAL DEMAND POTENTIAL	\$22,810		\$6,400,135,034	\$6,740,781,306	\$6,985,241,930		16,365,868	17,236,939	17,862,052
Additional Demand							871,071	625,113	

<sup>1</sup> See Exhibit II-6

<sup>2</sup> Based on US Census OnTheMap data of Prince George's County workers who reside in the County.

<sup>3</sup> Based on ESRI expenditure data by retail category.

<sup>4</sup> Based on ICSC Dollars and Cents.

<sup>5</sup> Services and fees derived from the Consumer Expenditure Survey and includes personal care products and services and apparel services.

## Exhibit II-14

### RETAIL DEMAND FROM EMPLOYEES LIVING OUTSIDE OF PRINCE GEORGE'S COUNTY PRINCE GEORGE'S COUNTY, MD 2014-2025

	2014	2020	2025
Projected Employees <sup>1</sup>	331,442	343,863	351,924
% Estimate Daily Commuters <sup>2</sup>	59%		
Projected Daily Commuters	195,551	202,879	207,635
% Office Workers <sup>3</sup>	20.50%	40,088	42,565
% Other Workers	79.50%	155,463	161,289

EXPENDITURE TYPE	PER OFFICE WORKER <sup>3</sup>	PER NON-OFFICE WORKER <sup>4</sup>	ANNUAL RETAIL EXPENDITURES				TOTAL RETAIL SPACE DEMANDED		
			2014	2020	2025	SALES/SF THRESHOLD <sup>5</sup>	2014	2020	2025
Dining - Lunch	\$688	\$344	\$81,000,721	\$84,036,253	\$86,006,371	\$400	202,502	210,091	215,016
Dining - Dinner/Drinks	\$649	\$324	\$76,405,771	\$79,269,106	\$81,127,464	\$450	169,791	176,154	180,283
Department Stores	\$197	\$98	\$23,158,548	\$24,026,423	\$24,589,690	\$400	57,896	60,066	61,474
Discount Stores	\$276	\$138	\$32,562,879	\$33,783,185	\$34,575,186	\$300	108,543	112,611	115,251
Drug Stores	\$179	\$89	\$21,044,871	\$21,833,535	\$22,345,393	\$400	52,612	54,584	55,863
Grocery Stores	\$515	\$257	\$60,622,707	\$62,894,566	\$64,369,044	\$400	151,557	157,236	160,923
Clothing Stores	\$99	\$49	\$11,640,540	\$12,076,774	\$12,359,897	\$400	29,101	30,192	30,900
Shoe Stores	\$73	\$37	\$8,638,506	\$8,962,237	\$9,172,345	\$400	21,596	22,406	22,931
Sporting Goods Stores	\$71	\$35	\$8,362,809	\$8,676,208	\$8,879,610	\$400	20,907	21,691	22,199
Electronics/Phone/Computer Stores	\$179	\$89	\$21,075,504	\$21,865,316	\$22,377,919	\$400	52,689	54,663	55,945
Jewelry Stores	\$87	\$44	\$10,292,688	\$10,678,410	\$10,928,751	\$400	25,732	26,696	27,322
Office Supplies/Stationery/Novelty Gifts and Cards	\$179	\$90	\$21,136,770	\$21,928,878	\$22,442,971	\$350	60,391	62,654	64,123
Warehouse Clubs	\$252	\$126	\$29,744,643	\$30,859,335	\$31,582,790	\$400	74,362	77,148	78,957
Other Goods (florist, non-food vendors, etc.)	\$94	\$47	\$11,058,513	\$11,472,935	\$11,741,902	\$350	31,596	32,780	33,548
Personal Care Shops	\$157	\$78	\$18,471,699	\$19,163,933	\$19,613,205	\$400	46,179	47,910	49,033
Personal Services	\$102	\$51	\$12,008,136	\$12,458,145	\$12,750,210	\$400	30,020	31,145	31,876
Other Services (not elsewhere classified)	\$90	\$45	\$10,660,284	\$11,059,782	\$11,319,064	\$400	26,651	27,649	28,298
<b>Total</b>	<b>\$3,886</b>	<b>\$1,943</b>	<b>\$457,885,591</b>	<b>\$475,045,022</b>	<b>\$486,181,815</b>	<b>\$391</b>	<b>1,162,124</b>	<b>1,205,675</b>	<b>1,233,941</b>
<b>Summary of Demand from Workers Residing Outside Prince George's County</b>									
Grocery & Drug	\$693	\$347	\$81,667,578	\$84,728,101	\$86,714,438	\$400	204,169	211,820	216,786
General Merchandise/Department Stores	\$725	\$363	\$85,466,070	\$88,668,943	\$90,747,667	\$367	240,801	249,825	255,682
Restaurant/Specialty Foods	\$1,336	\$668	\$157,406,493	\$163,305,359	\$167,133,834	\$425	372,292	386,244	395,299
Boutique Soft Goods	\$416	\$208	\$49,043,433	\$50,881,354	\$52,074,199	\$390	122,609	127,203	130,185
Home Goods	\$0	\$0	\$0	\$0	\$0	\$400	0	0	0
Florist/Gift/Hobby	\$344	\$172	\$40,558,092	\$42,078,022	\$43,064,484	\$375	112,894	117,124	119,870
Electronics	\$179	\$89	\$21,075,504	\$21,865,316	\$22,377,919	\$400	52,689	54,663	55,945
Beer/Wine/Specialty	\$0	\$0	\$0	\$0	\$0	\$450	0	0	0
Building/Lawn/Garden Stores	\$0	\$0	\$0	\$0	\$0	\$300	0	0	0
Auto Parts, Accessories, and Tires	\$0	\$0	\$0	\$0	\$0	\$300	0	0	0
Services	\$192	\$96	\$22,668,420	\$23,517,927	\$24,069,274	\$400	56,671	58,795	60,173
<b>TOTAL DEMAND POTENTIAL</b>	<b>\$3,886</b>	<b>\$1,943</b>	<b>\$457,885,591</b>	<b>\$475,045,022</b>	<b>\$486,181,815</b>	<b>\$382</b>	<b>1,162,124</b>	<b>1,205,675</b>	<b>1,233,941</b>

<sup>1</sup> See Exhibit II-3

<sup>2</sup> Based on US Census OnTheMap data and Prince George's County workers living in counties in a reasonable daily commute distance.

<sup>3</sup> Based on ICSC Office-Worker Retail Spending in a Digital Age, 2012.

<sup>4</sup> RCLCO assumption that non-office workers spend 50% less than office workers, based on analysis of average income by job type and average household spending by income from the Consumer Expenditure Survey.

<sup>5</sup> Based on ICSC Dollars and Cents.

SOURCE: Esri; Moody's Analytics

## Exhibit II-15

### ESTIMATED RETAIL DEMAND POTENTIAL FROM PRINCE GEORGE'S COUNTY VISITORS PRINCE GEORGE'S COUNTY, MD 2013-2025

	Assumptions	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
Annual Prince George's County Visitors <sup>1</sup>		6,160,000	6,389,854	6,628,284	6,875,611	7,132,167	7,398,296	7,674,355	7,960,715	8,257,761	8,565,890	8,885,517	9,217,070	9,560,995
Average Annual Visitor Retail and Restaurant Expenditures in Prince George's County	\$155 Per Visitor	\$955,600,000	\$991,257,161	\$1,028,244,830	\$1,066,612,652	\$1,106,412,128	\$1,147,696,677	\$1,190,521,714	\$1,234,944,720	\$1,281,025,321	\$1,328,825,369	\$1,378,409,023	\$1,429,842,837	\$1,483,195,847
Restaurants	\$92 Per Visitor	\$567,200,000	\$588,364,443	\$610,318,614	\$633,091,980	\$656,715,110	\$681,219,710	\$706,638,673	\$733,006,117	\$760,357,432	\$788,729,332	\$818,159,898	\$848,688,633	\$880,356,514
Retail and Discretionary <sup>2</sup>	\$63 Per Visitor	\$388,400,000	\$588,364,443	\$610,318,614	\$633,091,980	\$656,715,110	\$681,219,710	\$706,638,673	\$733,006,117	\$760,357,432	\$788,729,332	\$818,159,898	\$848,688,633	\$880,356,514
<b>Total Square Footage Supportable</b>	Sales PSF Threshold <sup>3</sup>													
Restaurants and Bars	\$450	1,260,444	1,307,477	1,356,264	1,406,871	1,459,367	1,513,822	1,570,308	1,628,902	1,689,683	1,752,732	1,818,133	1,885,975	1,956,348
Retail and Discretionary <sup>2</sup>	\$400	971,000	1,470,911	1,525,797	1,582,730	1,641,788	1,703,049	1,766,597	1,832,515	1,900,894	1,971,823	2,045,400	2,121,722	2,200,891

Additional Supportable Square Feet	2014	2014-2020	2020-2025	2025
Restaurants	1,307,477	321,426	327,445	1,956,348
Retail and Discretionary <sup>2</sup>	1,470,911	361,604	368,376	2,200,891

NOTE: RCLCO assumes visitor retail spending will only be at restaurants/bars and other discretionary purchases. Total visitor expenditures also account for hotel rooms, travel costs, and entertainment spending.

<sup>1</sup> Based on figures from Tourism Economics report "The Economic Impact of Tourism in Maryland" (page 8)

<sup>2</sup> Discretionary spending includes Retail and Other spending categories

<sup>3</sup> Based on estimated sales per square foot from Urban Land Institute's "Dollars and Cents of US Shopping Centers 200

SOURCE: Tourism Economics; Maryland Tourism Development Board and Office of Tourism Development

## Exhibit II-16

### TOURISM SPENDING PRINCE GEORGE'S COUNTY 2011-2013

ECONOMIC INDICATORS	2011	2012	2013	% CHANGE 2012-2013	OVERALL GROWTH
<b>Total Tourism Spending</b>	\$2,170,500,000	\$2,258,000,000	\$2,284,600,000	1.2%	2.6%
<b>Total Visitors (Person-Trips)</b>	5,724,800	5,978,800	6,160,000	3.0%	3.7%
Food & Beverage	\$516,400,000	\$548,100,000	\$567,200,000	3.5%	4.8%
Lodging	\$424,300,000	\$442,000,000	\$426,000,000	-3.6%	0.2%
Retail	\$357,900,000	\$376,300,000	\$388,400,000	3.2%	4.2%
Transportation	\$559,600,000	\$581,700,000	\$583,800,000	0.4%	2.1%
Entertainment/Recreation	\$298,300,000	\$296,100,000	\$306,000,000	3.3%	1.3%
Second Homes	\$14,000,000	\$13,800,000	\$13,400,000	-2.9%	-2.2%
<b>Spending per Visitor per Trip</b>	<b>\$379</b>	<b>\$378</b>	<b>\$371</b>	<b>-1.8%</b>	<b>-1.1%</b>
Food and Beverage Percentage of Total Spending	24%	24%	25%	2.3%	2.2%
Lodging Percentage of Total Spending	20%	20%	19%	-4.7%	-2.3%
Retail Percentage of Total Spending	16%	17%	17%	2.0%	1.5%
Transportation Percentage of Total Spending	26%	26%	26%	-0.8%	-0.4%
Entertainment/Recreation Percentage of Total Spending	14%	13%	13%	2.1%	-1.3%
Second Homes Percentage of Total Spending	1%	1%	1%	-4.0%	-4.6%

SOURCE: Prince George's County Tourism Economics Report

# M-NCPPC

## Exhibit II-17

### HISTORICAL RETAIL SALES REVENUE PRINCE GEORGE'S COUNTY, MD FY 2010-FY 2013

TYPE OF BUSINESS	DISTRIBUTION	HISTORICAL			
		2010	2011	2012	2013
<b>Total Sales Tax Generated</b>		\$441,141,000	\$454,394,000	\$481,737,000	\$480,744,000
Food & Beverage		\$105,876,000	\$110,209,000	\$124,966,000	\$123,394,000
Apparel		\$21,211,000	\$22,582,000	\$23,341,000	\$23,917,000
General Merchandise		\$87,455,000	\$89,968,000	\$92,105,000	\$92,905,000
Automotive		\$34,254,000	\$35,690,000	\$36,056,000	\$35,426,000
Furniture & Appliances		\$32,261,000	\$27,608,000	\$27,966,000	\$27,952,000
Hardware, Machinery, & Equipment		\$10,378,000	\$9,525,000	\$10,175,000	\$10,132,000
Miscellaneous		\$54,530,000	\$57,056,000	\$58,076,000	\$59,024,000
<b>Total Sales Generated<sup>1</sup></b>		\$7,352,350,000	\$7,573,233,333	\$8,028,950,000	\$8,012,400,000
Food & Beverage	28% of Sales	\$1,764,600,000	\$1,836,816,667	\$2,082,766,667	\$2,056,566,667
Apparel	6% of Sales	\$353,516,667	\$376,366,667	\$389,016,667	\$398,616,667
General Merchandise	21% of Sales	\$1,457,583,333	\$1,499,466,667	\$1,535,083,333	\$1,548,416,667
Automotive	N/A	\$570,900,000	\$594,833,333	\$600,933,333	\$590,433,333
Furniture & Appliances	6% of Sales	\$537,683,333	\$460,133,333	\$466,100,000	\$465,866,667
Hardware, Machinery, & Equipment	2% of Sales	\$172,966,667	\$158,750,000	\$169,583,333	\$168,866,667
Miscellaneous	14% of Sales	\$908,833,333	\$950,933,333	\$967,933,333	\$983,733,333

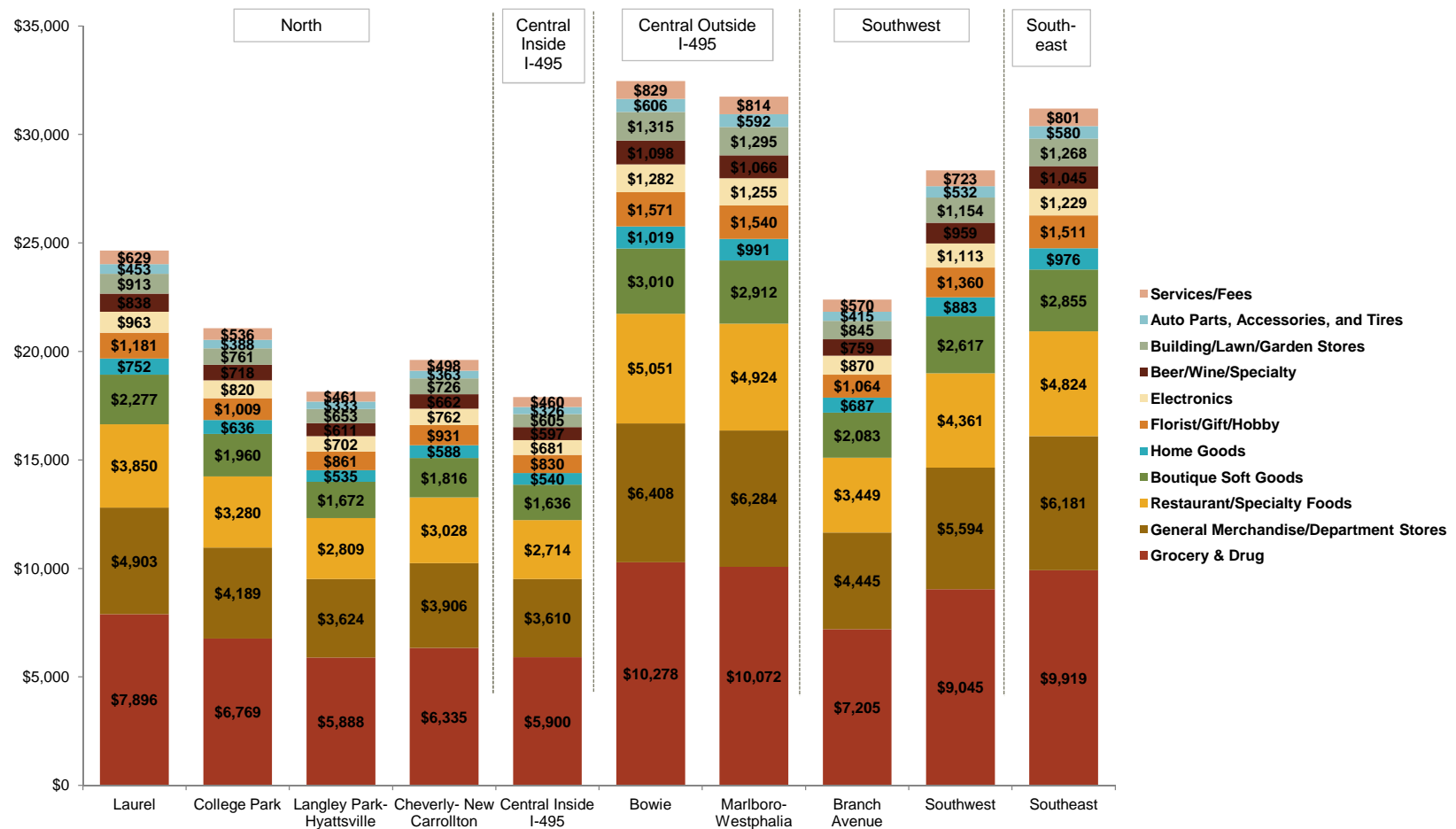
<sup>1</sup> Distribution assumes similar spending patterns to historical years as reported by the Comptroller of Maryland

SOURCE: Comptroller of Maryland

# M-NCPPC

Exhibit II-18

## AVERAGE SPENDING PER HOUSEHOLD BY TRADE AREA PRINCE GEORGE'S COUNTY, MD 2014



SOURCE: Esri

# M-NCPPC

## Exhibit II-19

### HOUSEHOLD SPENDING BY TRADE AREA COMPARED TO COUNTY AVERAGE HOUSEHOLD SPENDING PRINCE GEORGE'S COUNTY, MD OCTOBER 2014

Average Household Spending by Geography	Prince George's County		NORTH MARKET								CENTRAL INSIDE I-495 MARKET		CENTRAL OUTSIDE I-495 MARKET				SOUTHWEST MARKET				SOUTHEAST MARKET	
			Laurel		College Park		Langley Park-Hyattsville		Cheverly- New Carrollton		Central Inside I-495		Bowie		Marlboro-Westphalia		Branch Avenue		Southwest		Southeast	
	Wtd. Avg. Amount	Spending Ratio	Amount	Spending Ratio	Amount	Spending Ratio	Amount	Spending Ratio	Amount	Spending Ratio	Amount	Spending Ratio	Amount	Spending Ratio	Amount	Spending Ratio	Amount	Spending Ratio	Amount	Spending Ratio	Amount	Spending Ratio
Grocery & Drug	\$7,692	1.00	\$7,896	1.03	\$6,769	0.88	\$5,888	0.77	\$6,335	0.82	\$5,900	0.77	\$10,278	1.34	\$10,072	1.31	\$7,205	0.94	\$9,045	1.18	\$9,919	1.29
General Merchandise/Dept. Stores	\$4,762	1.00	\$4,903	1.03	\$4,189	0.88	\$3,624	0.76	\$3,906	0.82	\$3,610	0.76	\$6,408	1.35	\$6,284	1.32	\$4,445	0.93	\$5,594	1.17	\$6,181	1.30
Restaurant/Specialty Foods	\$3,707	1.00	\$3,850	1.04	\$3,280	0.88	\$2,809	0.76	\$3,028	0.82	\$2,714	0.73	\$5,051	1.36	\$4,924	1.33	\$3,449	0.93	\$4,361	1.18	\$4,824	1.30
Boutique Soft Goods	\$2,215	1.00	\$2,277	1.03	\$1,960	0.88	\$1,672	0.75	\$1,816	0.82	\$1,636	0.74	\$3,010	1.36	\$2,912	1.31	\$2,083	0.94	\$2,617	1.18	\$2,855	1.29
Home Goods	\$735	1.00	\$752	1.02	\$636	0.86	\$535	0.73	\$588	0.80	\$540	0.73	\$1,019	1.39	\$991	1.35	\$687	0.93	\$883	1.20	\$976	1.33
Florist/Gift/Hobby	\$1,146	1.00	\$1,181	1.03	\$1,009	0.88	\$861	0.75	\$931	0.81	\$830	0.72	\$1,571	1.37	\$1,540	1.34	\$1,064	0.93	\$1,360	1.19	\$1,511	1.32
Electronics	\$936	1.00	\$963	1.03	\$820	0.88	\$702	0.75	\$762	0.81	\$681	0.73	\$1,282	1.37	\$1,255	1.34	\$870	0.93	\$1,113	1.19	\$1,229	1.31
Beer/Wine/Specialty	\$810	1.00	\$838	1.03	\$718	0.89	\$611	0.76	\$662	0.82	\$597	0.74	\$1,098	1.36	\$1,066	1.32	\$759	0.94	\$959	1.18	\$1,045	1.29
Building/Lawn/Garden Stores	\$916	1.00	\$913	1.00	\$761	0.83	\$653	0.71	\$726	0.79	\$605	0.66	\$1,315	1.44	\$1,295	1.41	\$845	0.92	\$1,154	1.26	\$1,268	1.38
Auto Parts, Accessories, and Tires	\$444	1.00	\$453	1.02	\$388	0.87	\$333	0.75	\$363	0.82	\$326	0.73	\$606	1.36	\$592	1.33	\$415	0.94	\$532	1.20	\$580	1.31
Services/Fees	\$612	1.00	\$629	1.03	\$536	0.88	\$461	0.75	\$498	0.81	\$460	0.75	\$829	1.35	\$814	1.33	\$570	0.93	\$723	1.18	\$801	1.31
<b>TOTAL</b>	<b>\$23,975</b>	<b>1.00</b>	<b>\$24,656</b>	<b>1.03</b>	<b>\$21,065</b>	<b>0.88</b>	<b>\$18,148</b>	<b>0.76</b>	<b>\$19,614</b>	<b>0.82</b>	<b>\$17,900</b>	<b>0.75</b>	<b>\$32,466</b>	<b>1.35</b>	<b>\$31,744</b>	<b>1.32</b>	<b>\$22,393</b>	<b>0.93</b>	<b>\$28,341</b>	<b>1.18</b>	<b>\$31,188</b>	<b>1.30</b>

NOTE: A spending ratio of greater than one indicates that households in a trade area spend more, on average, than the county as a whole.

NOTE: Prince George's County average spending numbers differ slightly from numbers in the demand model because of the weighted average calculation of household spending per trade area, necessary in order to fully distribute square footage demand.

SOURCE: Esri, RCLCO

## Exhibit II-20

### DISTRIBUTION OF RETAIL DEMAND BY TRADE AREA PRINCE GEORGE'S COUNTY, MD 2014-2020

TRADE AREA DEMAND SUMMARY						
Trade Area	Households	Household Distribution	Average Spending Ratio	Total Demand per HH by Submarket \$	Total Demand 2014 (SF)	Total Demand 2020 (SF)
<b>Prince George's County</b>	<b>309,238</b>		<b>1.00</b>	<b>\$23,975</b>	<b>22,291,897</b>	<b>24,107,288</b>
<b>North Regional Trade Area</b>	<b>123,752</b>			<b>\$20,578</b>	<b>7,654,797</b>	<b>8,278,727</b>
Laurel	26,938	9%	1.03	\$24,656	1,997,243	2,160,123
College Park	23,613	8%	0.88	\$21,065	1,495,593	1,617,688
Langley Park-Hyattsville	34,624	11%	0.76	\$18,148	1,887,835	2,041,542
Cheverly-New Carrollton	38,577	12%	0.82	\$19,614	2,274,126	2,459,374
<b>Central Inside I-495 Regional Trade Area</b>	<b>40,867</b>			<b>\$17,900</b>	<b>2,191,338</b>	<b>2,369,094</b>
Central Inside I-495	40,867	13%	0.75	\$17,900	2,191,338	2,369,094
<b>Central Outside I-495 Regional Trade Area</b>	<b>65,387</b>			<b>\$32,306</b>	<b>6,360,070</b>	<b>6,878,339</b>
Bowie	50,871	16%	1.35	\$32,466	4,973,308	5,378,789
Marlboro-Westphalia	14,516	5%	1.32	\$31,744	1,386,761	1,499,550
<b>Southwest Regional Trade Area</b>	<b>69,519</b>			<b>\$24,749</b>	<b>5,174,335</b>	<b>5,595,703</b>
Branch Avenue	41,981	14%	0.93	\$22,393	2,826,231	3,056,577
Southwest	27,538	9%	1.18	\$28,341	2,348,104	2,539,126
<b>Southeast Regional Trade Area</b>	<b>9,713</b>			<b>\$31,188</b>	<b>911,357</b>	<b>985,425</b>
Southeast	9,713	3%	1.30	\$31,188	911,357	985,425



## Exhibit II-20

### DISTRIBUTION OF RETAIL DEMAND BY TRADE AREA PRINCE GEORGE'S COUNTY, MD 2014-2020

TRADE AREA DEMAND DISTRIBUTION BY RETAIL TYPE					
Trade Area	Household Distribution	Avg. Spending Per HH	Spending Ratio	Trade Area Retail Demand 2014	Trade Area Retail Demand 2020
<b>Prince George's County</b>	<b>100%</b>			<b>22,291,897</b>	<b>24,107,288</b>
Grocery & Drug				6,166,850	6,491,542
General Merchandise/Department Stores				3,986,824	4,194,893
Restaurant/Specialty Foods				4,480,125	4,996,827
Boutique Soft Goods				2,938,962	3,457,562
Home Goods				488,071	514,049
Florist/Gift/Hobby				1,111,553	1,168,761
Electronics				650,775	684,499
Beer/Wine/Specialty				491,954	518,139
Building/Lawn/Garden Stores				1,083,840	1,141,527
Auto Parts, Accessories, and Tires				484,220	509,993
Services/Fees				408,723	429,496
<b>TRADE AREAS</b>					
<b>North Regional Trade Area</b>					
<b>Laurel</b>	<b>9%</b>	<b>\$24,656</b>	<b>1.03</b>	<b>1,997,243</b>	<b>2,160,123</b>
Grocery & Drug		\$7,896	1.03	551,385	580,416
General Merchandise/Department Stores		\$4,903	1.03	357,574	376,235
Restaurant/Specialty Foods		\$3,850	1.04	405,371	452,123
Boutique Soft Goods		\$2,277	1.03	263,178	309,618
Home Goods		\$752	1.02	43,475	45,789
Florist/Gift/Hobby		\$1,181	1.03	99,818	104,956
Electronics		\$963	1.03	58,323	61,346
Beer/Wine/Specialty		\$838	1.03	44,353	46,714
Building/Lawn/Garden Stores		\$913	1.00	94,126	99,136
Auto Parts, Accessories, and Tires		\$453	1.02	43,006	45,295
Services/Fees		\$629	1.03	36,634	38,496
<b>College Park</b>	<b>8%</b>	<b>\$21,065</b>	<b>0.88</b>	<b>1,495,593</b>	<b>1,617,688</b>
Grocery & Drug		\$6,769	0.88	414,349	436,165
General Merchandise/Department Stores		\$4,189	0.88	267,788	281,764
Restaurant/Specialty Foods		\$3,280	0.88	302,698	337,609
Boutique Soft Goods		\$1,960	0.88	198,532	233,564
Home Goods		\$636	0.86	32,220	33,935
Florist/Gift/Hobby		\$1,009	0.88	74,741	78,588
Electronics		\$820	0.88	43,522	45,777
Beer/Wine/Specialty		\$718	0.89	33,308	35,081
Building/Lawn/Garden Stores		\$761	0.83	68,823	72,487
Auto Parts, Accessories, and Tires		\$388	0.87	32,271	33,989
Services/Fees		\$536	0.88	27,339	28,729

## Exhibit II-20

### DISTRIBUTION OF RETAIL DEMAND BY TRADE AREA PRINCE GEORGE'S COUNTY, MD 2014-2020

TRADE AREA DEMAND DISTRIBUTION BY RETAIL TYPE					
Trade Area	Household Distribution	Avg. Spending Per HH	Spending Ratio	Trade Area Retail Demand 2014	Trade Area Retail Demand 2020
<b>Langley Park-Hyattsville</b>	<b>11%</b>	<b>\$18,148</b>	<b>0.76</b>	<b>1,887,835</b>	<b>2,041,542</b>
Grocery & Drug		\$5,888	0.77	528,466	556,291
General Merchandise/Department Stores		\$3,624	0.76	339,676	357,404
Restaurant/Specialty Foods		\$2,809	0.76	380,165	424,010
Boutique Soft Goods		\$1,672	0.75	248,271	292,080
Home Goods		\$535	0.73	39,733	41,848
Florist/Gift/Hobby		\$861	0.75	93,515	98,328
Electronics		\$702	0.75	54,655	57,487
Beer/Wine/Specialty		\$611	0.76	41,594	43,808
Building/Lawn/Garden Stores		\$653	0.71	86,600	91,209
Auto Parts, Accessories, and Tires		\$333	0.75	40,705	42,872
Services/Fees		\$461	0.75	34,454	36,205
<b>Cheverly-New Carrollton</b>	<b>12%</b>	<b>\$19,614</b>	<b>0.82</b>	<b>2,274,126</b>	<b>2,459,374</b>
Grocery & Drug		\$6,335	0.82	633,528	666,884
General Merchandise/Department Stores		\$3,906	0.82	407,987	429,280
Restaurant/Specialty Foods		\$3,028	0.82	456,447	509,091
Boutique Soft Goods		\$1,816	0.82	300,535	353,567
Home Goods		\$588	0.80	48,665	51,255
Florist/Gift/Hobby		\$931	0.81	112,603	118,399
Electronics		\$762	0.81	66,072	69,496
Beer/Wine/Specialty		\$662	0.82	50,157	52,827
Building/Lawn/Garden Stores		\$726	0.79	107,261	112,970
Auto Parts, Accessories, and Tires		\$363	0.82	49,325	51,950
Services/Fees		\$498	0.81	41,545	43,656

## Exhibit II-20

### DISTRIBUTION OF RETAIL DEMAND BY TRADE AREA PRINCE GEORGE'S COUNTY, MD 2014-2020

TRADE AREA DEMAND DISTRIBUTION BY RETAIL TYPE					
Trade Area	Household Distribution	Avg. Spending Per HH	Spending Ratio	Trade Area Retail Demand 2014	Trade Area Retail Demand 2020
<b>Central Inside I-495 Regional Trade Area</b>					
<b>Central Inside I-495</b>	<b>13%</b>	<b>\$17,900</b>	<b>1.35</b>	<b>2,191,338</b>	<b>2,369,094</b>
Grocery & Drug		\$5,900	0.77	625,045	657,954
General Merchandise/Department Stores		\$3,610	0.76	399,437	420,283
Restaurant/Specialty Foods		\$2,714	0.73	433,436	483,425
Boutique Soft Goods		\$1,636	0.74	286,832	337,446
Home Goods		\$540	0.73	47,403	49,926
Florist/Gift/Hobby		\$830	0.72	106,392	111,868
Electronics		\$681	0.73	62,628	65,874
Beer/Wine/Specialty		\$597	0.74	47,964	50,517
Building/Lawn/Garden Stores		\$605	0.66	94,618	99,654
Auto Parts, Accessories, and Tires		\$326	0.73	46,994	49,495
Services/Fees		\$460	0.75	40,589	42,652
<b>Central Outside I-495 Regional Trade Area</b>					
<b>Bowie</b>	<b>16%</b>	<b>\$32,466</b>	<b>0.75</b>	<b>4,973,308</b>	<b>5,378,789</b>
Grocery & Drug		\$10,278	1.34	1,355,430	1,426,795
General Merchandise/Department Stores		\$6,408	1.35	882,518	928,576
Restaurant/Specialty Foods		\$5,051	1.36	1,004,304	1,120,133
Boutique Soft Goods		\$3,010	1.36	656,968	772,894
Home Goods		\$1,019	1.39	111,265	117,187
Florist/Gift/Hobby		\$1,571	1.37	250,683	263,585
Electronics		\$1,282	1.37	146,671	154,272
Beer/Wine/Specialty		\$1,098	1.36	109,764	115,606
Building/Lawn/Garden Stores		\$1,315	1.44	255,999	269,625
Auto Parts, Accessories, and Tires		\$606	1.36	108,630	114,411
Services/Fees		\$829	1.35	91,075	95,704
<b>Marlboro-Westphalia</b>					
<b>Marlboro-Westphalia</b>	<b>5%</b>	<b>\$31,744</b>	<b>1.32</b>	<b>1,386,761</b>	<b>1,499,550</b>
Grocery & Drug		\$10,072	1.31	379,024	398,980
General Merchandise/Department Stores		\$6,284	1.32	246,965	259,854
Restaurant/Specialty Foods		\$4,924	1.33	279,320	311,534
Boutique Soft Goods		\$2,912	1.31	181,332	213,329
Home Goods		\$991	1.35	30,891	32,535
Florist/Gift/Hobby		\$1,540	1.34	70,106	73,714
Electronics		\$1,255	1.34	40,966	43,089
Beer/Wine/Specialty		\$1,066	1.32	30,409	32,028
Building/Lawn/Garden Stores		\$1,295	1.41	71,942	75,771
Auto Parts, Accessories, and Tires		\$592	1.33	30,290	31,903
Services/Fees		\$814	1.33	25,517	26,813

## Exhibit II-20

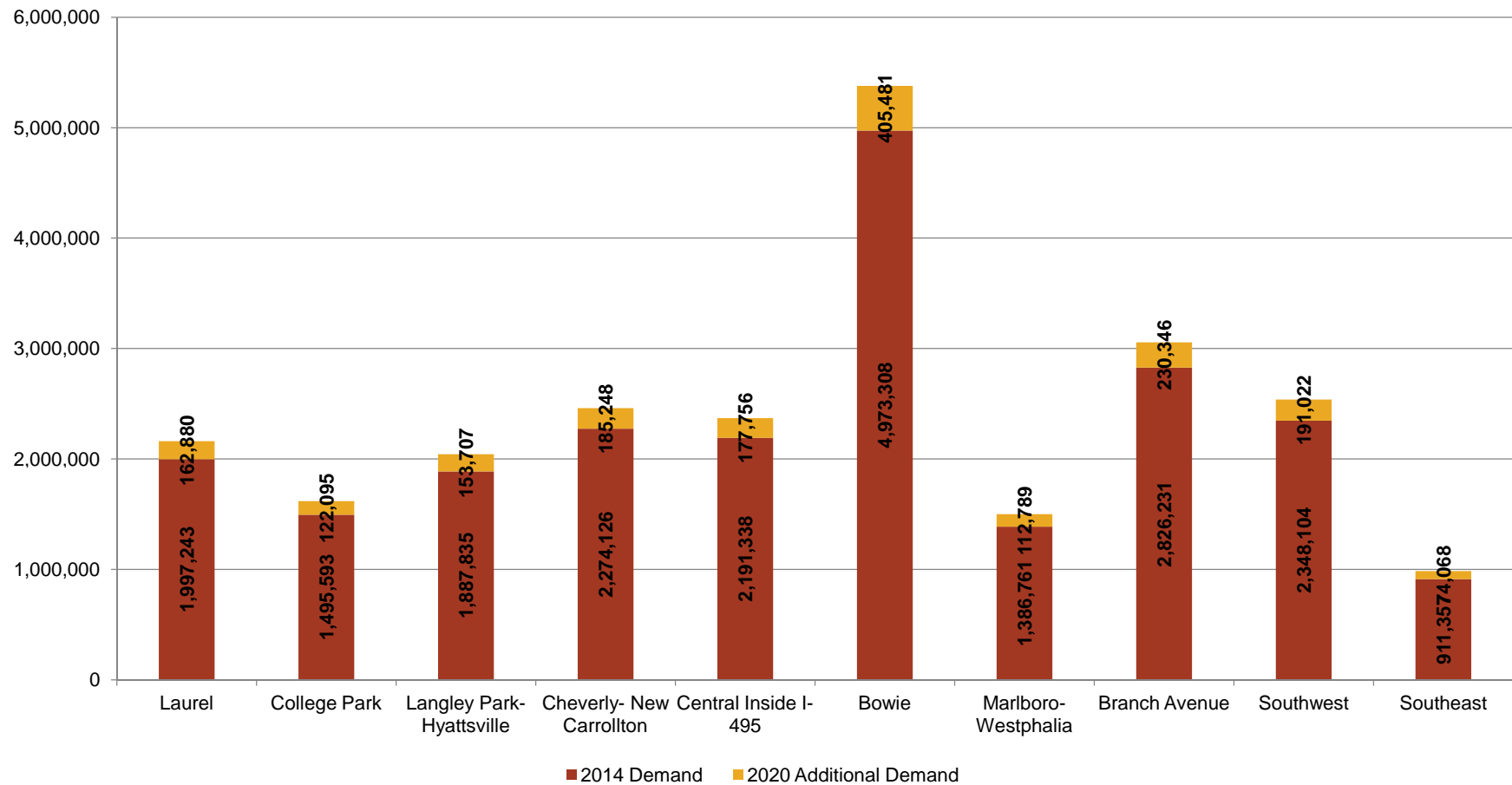
### DISTRIBUTION OF RETAIL DEMAND BY TRADE AREA PRINCE GEORGE'S COUNTY, MD 2014-2020

TRADE AREA DEMAND DISTRIBUTION BY RETAIL TYPE					
Trade Area	Household Distribution	Avg. Spending Per HH	Spending Ratio	Trade Area Retail Demand 2014	Trade Area Retail Demand 2020
<b>Southwest Regional Trade Area</b>					
<b>Branch Avenue</b>	14%	\$22,393	0.93	2,826,231	3,056,577
Grocery & Drug		\$7,205	0.94	784,135	825,420
General Merchandise/Department Stores		\$4,445	0.93	505,276	531,646
Restaurant/Specialty Foods		\$3,449	0.93	565,925	631,194
Boutique Soft Goods		\$2,083	0.94	375,155	441,354
Home Goods		\$687	0.93	61,910	65,206
Florist/Gift/Hobby		\$1,064	0.93	140,170	147,384
Electronics		\$870	0.93	82,145	86,402
Beer/Wine/Specialty		\$759	0.94	62,586	65,917
Building/Lawn/Garden Stores		\$845	0.92	135,728	142,952
Auto Parts, Accessories, and Tires		\$415	0.94	61,474	64,746
Services/Fees		\$570	0.93	51,727	54,356
<b>Southwest</b>	9%	\$28,341	1.18	2,348,104	2,539,126
Grocery & Drug		\$9,045	1.18	645,723	679,721
General Merchandise/Department Stores		\$5,594	1.17	417,066	438,833
Restaurant/Specialty Foods		\$4,361	1.18	469,344	523,474
Boutique Soft Goods		\$2,617	1.18	309,207	363,768
Home Goods		\$883	1.20	52,165	54,941
Florist/Gift/Hobby		\$1,360	1.19	117,498	123,545
Electronics		\$1,113	1.19	68,937	72,510
Beer/Wine/Specialty		\$959	1.18	51,874	54,636
Building/Lawn/Garden Stores		\$1,154	1.26	121,603	128,075
Auto Parts, Accessories, and Tires		\$532	1.20	51,649	54,398
Services/Fees		\$723	1.18	43,038	45,225
<b>Southeast Regional Trade Area</b>					
<b>Southeast</b>	3%	\$31,188	1.30	911,357	985,425
Grocery & Drug		\$9,919	1.29	249,765	262,916
General Merchandise/Department Stores		\$6,181	1.30	162,536	171,019
Restaurant/Specialty Foods		\$4,824	1.30	183,114	204,233
Boutique Soft Goods		\$2,855	1.29	118,952	139,942
Home Goods		\$976	1.33	20,344	21,427
Florist/Gift/Hobby		\$1,511	1.32	46,026	48,395
Electronics		\$1,229	1.31	26,854	28,245
Beer/Wine/Specialty		\$1,045	1.29	19,945	21,007
Building/Lawn/Garden Stores		\$1,268	1.38	47,140	49,649
Auto Parts, Accessories, and Tires		\$580	1.31	19,875	20,933
Services/Fees		\$801	1.31	16,806	17,660

SOURCE: Esri

Exhibit II-21

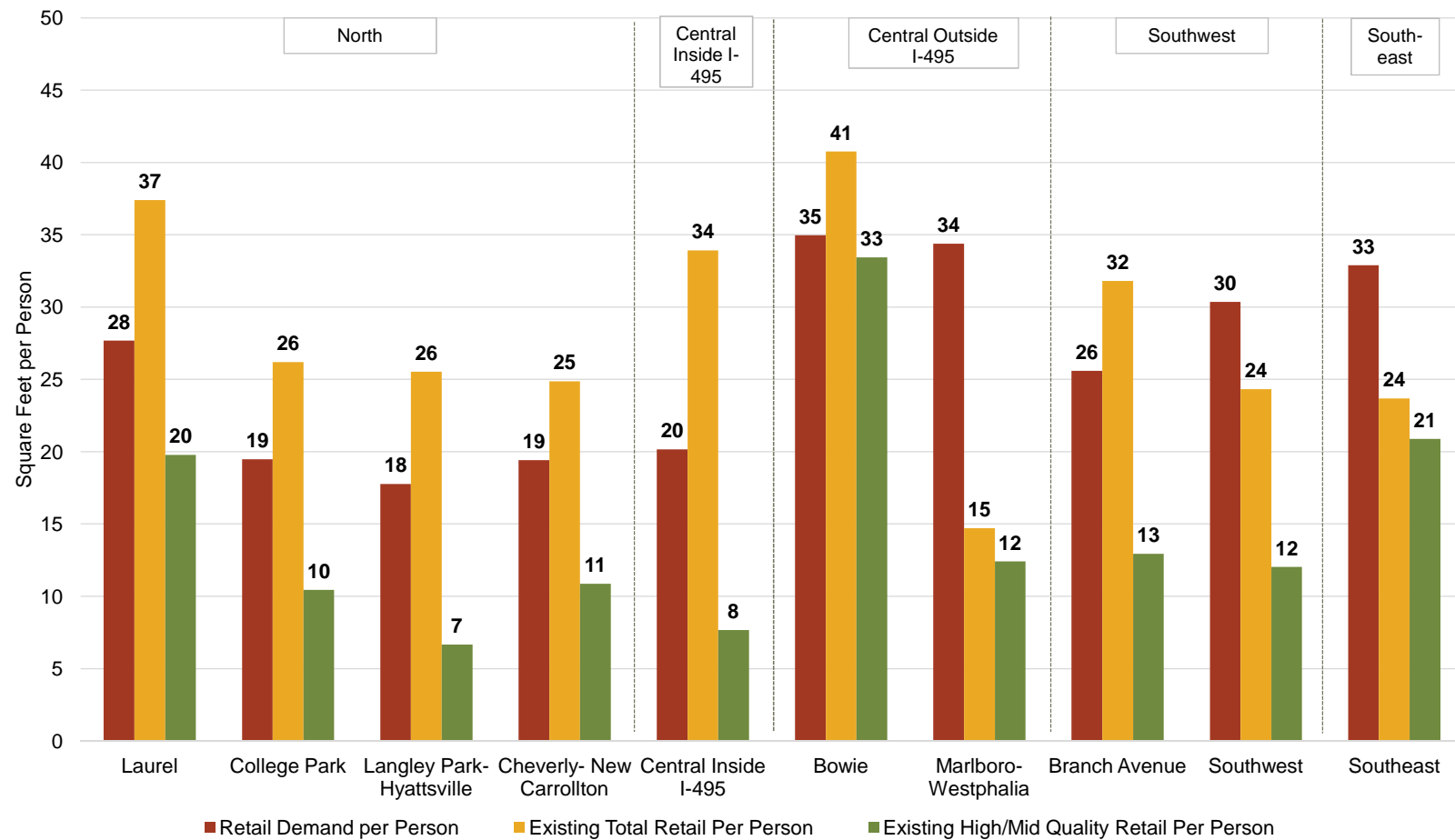
**RETAIL DEMAND SQUARE FOOTAGE BY LOCAL TRADE AREA  
PRINCE GEORGE'S COUNTY, MD  
2014-2020**



SOURCE: RCLCO

Exhibit II-22

**RETAIL DEMAND AND SUPPLY COMPARISON AND PERCENTAGE OF HIGH-QUALITY REGIONAL RETAIL  
PRINCE GEORGE'S COUNTY, MD  
OCTOBER 2014**



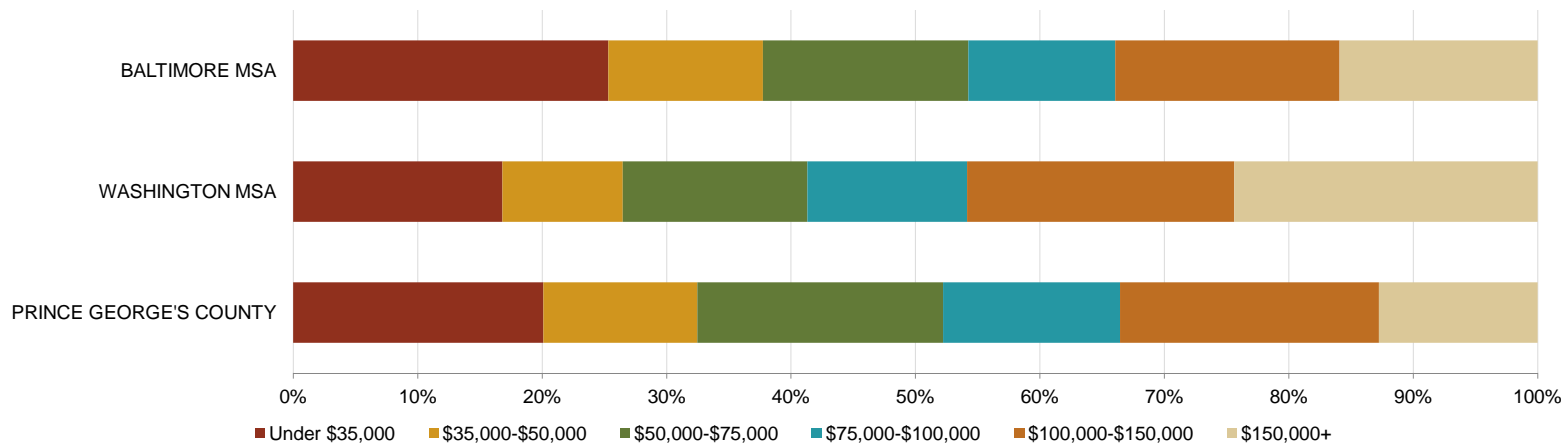
SOURCE: CoStar; Esri

# M-NCPPC

Exhibit II-23

## HOUSEHOLDS BY INCOME PRINCE GEORGE'S COUNTY, MD; WASHINGTON, D.C., MSA; BALTIMORE, MD MSA 2014

INCOME RANGE	PRINCE GEORGE'S COUNTY		WASHINGTON MSA		BALTIMORE MSA		TOTAL <sup>1</sup>	
	TOTAL	PCT.	TOTAL	PCT.	TOTAL	PCT.	TOTAL	PCT.
Less than \$25,000	37,191	12%	232,834	11%	178,572	17%	411,406	13%
\$25,000 - \$34,999	24,894	8%	133,964	6%	89,824	8%	223,788	7%
\$35,000 - \$49,999	38,176	12%	210,798	10%	131,596	12%	342,394	11%
\$50,000 - \$74,999	60,921	20%	323,859	15%	174,967	17%	498,826	15%
\$75,000 - \$99,999	43,947	14%	280,128	13%	125,004	12%	405,132	12%
\$100,000 - \$149,999	64,180	21%	468,625	21%	191,041	18%	659,666	20%
\$150,000 - \$199,999	25,073	8%	256,778	12%	87,226	8%	344,004	11%
\$200,000 and Over	14,338	5%	275,473	13%	81,558	8%	357,031	11%
<b>TOTAL</b>	<b>308,720</b>	<b>100%</b>	<b>2,182,459</b>	<b>100%</b>	<b>1,059,788</b>	<b>100%</b>	<b>3,242,247</b>	<b>100%</b>
<b>Percent of Total</b>	<b>10%</b>		<b>67%</b>		<b>33%</b>		<b>100%</b>	



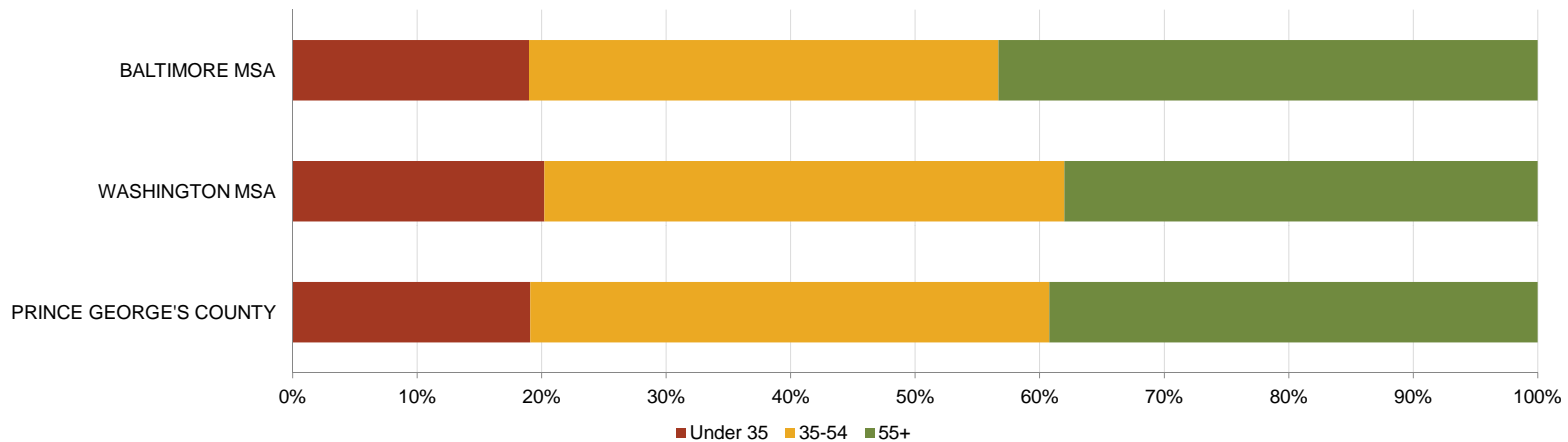
<sup>1</sup> Total is sum of figures for Washington, D.C., MSA and Baltimore, MD MSA; figures for Prince George's County is included in Washington, D.C., figures  
SOURCE: ESRI Business Analyst; RCLCO

# M-NCPPC

*Exhibit II-24*

**HOUSEHOLDS BY AGE  
PRINCE GEORGE'S COUNTY, MD; WASHINGTON, D.C., MSA; BALTIMORE, MD MSA  
2014**

AGE RANGE	PRINCE GEORGE'S COUNTY		WASHINGTON MSA		BALTIMORE MSA		TOTAL <sup>1</sup>	
	TOTAL	PCT.	TOTAL	PCT.	TOTAL	PCT.	TOTAL	PCT.
Under 25	10,971	4%	69,189	3%	36,158	3%	105,347	3%
25 - 34	47,908	16%	371,937	17%	164,893	16%	536,830	17%
35 - 44	60,370	20%	435,318	20%	179,932	17%	615,250	19%
45 - 54	68,377	22%	475,978	22%	219,838	21%	695,816	21%
55 - 64	61,576	20%	411,091	19%	210,030	20%	621,121	19%
65 - 74	38,142	12%	249,945	11%	140,195	13%	390,140	12%
75 and Over	21,376	7%	169,001	8%	108,742	10%	277,743	9%
<b>TOTAL</b>	<b>308,720</b>	<b>100%</b>	<b>2,182,459</b>	<b>100%</b>	<b>1,059,788</b>	<b>100%</b>	<b>3,242,247</b>	<b>100%</b>
<b>Percent of Total</b>	<b>10%</b>		<b>67%</b>		<b>33%</b>		<b>100%</b>	



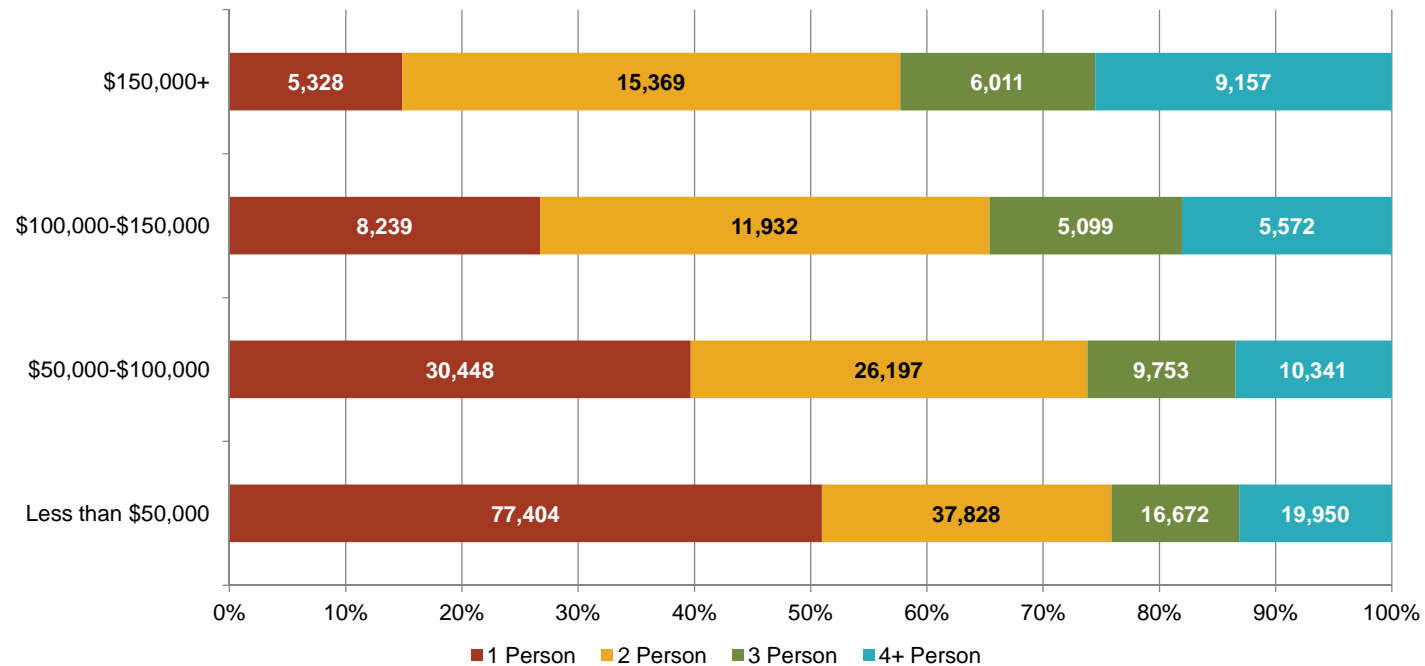
<sup>1</sup> Total is sum of figures for Washington, D.C., MSA and Baltimore, MD MSA; figures for Prince George's County is included in Washington, D.C., figures  
SOURCE: ESRI Business Analyst; RCLCO



# M-NCPPC

Exhibit II-25

## DISTRIBUTION OF HOUSEHOLDS BY INCOME AND SIZE PRINCE GEORGE'S COUNTY, MD 2011



Household Size by Income	Number					Distribution			
	1 Person	2 Person	3 Person	4+ Person	Total	1 Person	2 Person	3 Person	4+ Person
Less than \$50,000	77,404	37,828	16,672	19,950	151,854	51%	25%	11%	13%
\$50,000-\$100,000	30,448	26,197	9,753	10,341	76,739	40%	34%	13%	13%
\$100,000-\$150,000	8,239	11,932	5,099	5,572	30,842	27%	39%	17%	18%
\$150,000+	5,328	15,369	6,011	9,157	35,865	15%	43%	17%	26%

SOURCE: American Community Survey, 2009-2011

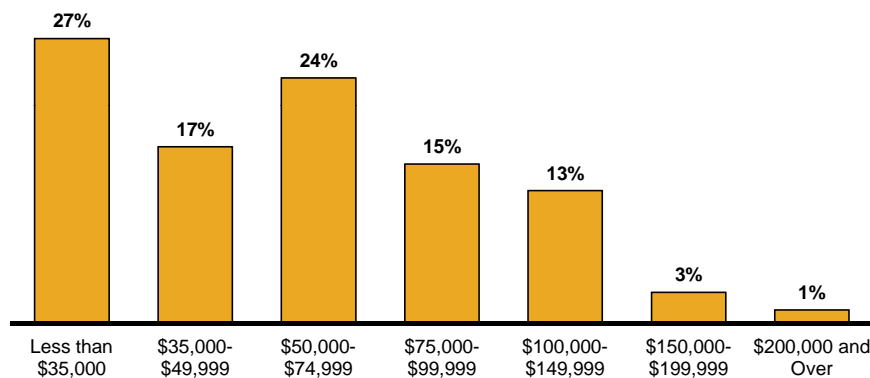
# M-NCPPC

Exhibit II-26

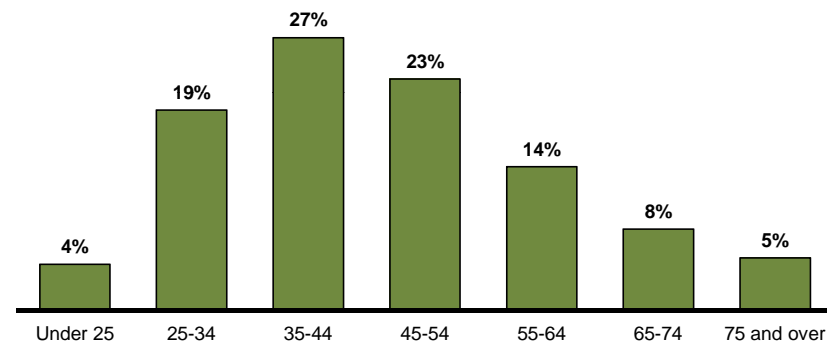
## HOUSEHOLDS BY AGE AND INCOME PRINCE GEORGE'S COUNTY, MD 2000

INCOME RANGE	PROFESSIONALS						EMPTY NESTERS				RETIREES				TOTAL	
	UNDER 25		25-34		35-44		45-54		55-64		65-74		75 AND OVER			
	TOTAL	PCT.	TOTAL	PCT.	TOTAL	PCT.	TOTAL	PCT.	TOTAL	PCT.	TOTAL	PCT.	TOTAL	PCT.	TOTAL	PCT.
Less than \$25,000	5,474	42%	9,487	17%	8,480	11%	6,035	9%	5,422	14%	5,442	24%	5,745	39%	46,085	16%
\$25,000 - \$34,999	2,312	18%	9,431	17%	7,689	10%	5,045	8%	3,270	8%	2,796	12%	1,635	11%	32,178	11%
\$35,000 - \$49,999	2,323	18%	12,048	22%	13,328	18%	9,552	15%	5,233	13%	3,809	17%	2,238	15%	48,531	17%
\$50,000 - \$74,999	1,899	15%	14,007	25%	19,561	26%	15,803	24%	8,953	22%	4,624	20%	2,523	17%	67,370	24%
\$75,000 - \$99,999	523	4%	6,720	12%	13,066	17%	11,900	18%	7,486	19%	2,672	12%	1,411	10%	43,778	15%
\$100,000 - \$149,999	290	2%	3,544	6%	10,884	14%	11,901	18%	6,781	17%	2,271	10%	808	6%	36,479	13%
\$150,000 - \$199,999	39	0%	490	1%	2,110	3%	3,096	5%	1,970	5%	643	3%	177	1%	8,525	3%
\$200,000 and Over	24	0%	164	0%	906	1%	1,179	2%	913	2%	433	2%	85	1%	3,704	1%
TOTAL	12,884	100%	55,891	100%	76,024	100%	64,511	100%	40,028	100%	22,690	100%	14,622	100%	286,650	100%
Percent of Total	4%		19%		27%		23%		14%		8%		5%		100%	

HOUSEHOLDS BY INCOME



HOUSEHOLDS BY AGE



SOURCE: ESRI Business Analyst; RCLCO

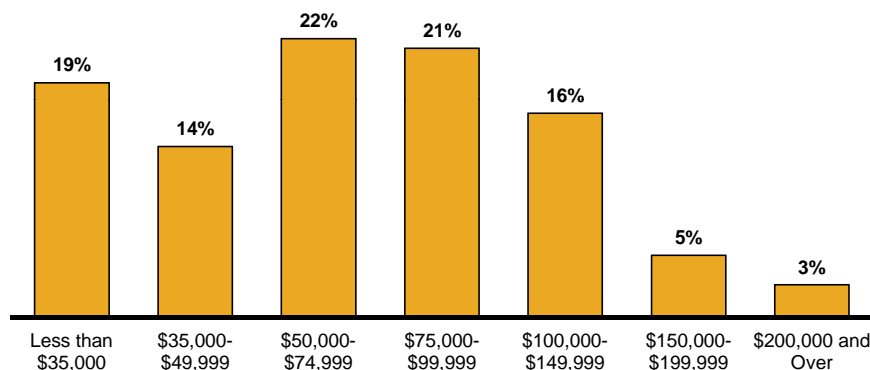
# M-NCPPC

Exhibit II-27

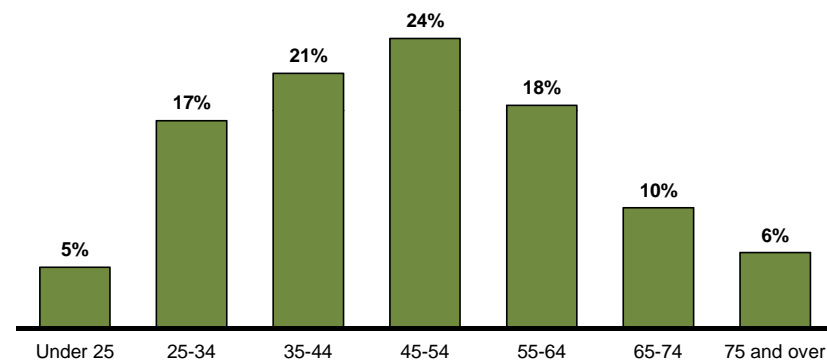
## HOUSEHOLDS BY AGE AND INCOME PRINCE GEORGE'S COUNTY, MD 2010

INCOME RANGE	UNDER 25		PROFESSIONALS				EMPTY NESTERS				RETIREES				TOTAL	
	TOTAL	PCT.	25-34	PCT.	35-44	PCT.	45-54	PCT.	55-64	PCT.	65-74	PCT.	75 AND OVER	PCT.	TOTAL	PCT.
Less than \$25,000	4,998	34%	5,934	12%	4,786	8%	4,441	6%	4,783	9%	4,516	15%	4,747	26%	34,205	11%
\$25,000 - \$34,999	1,952	13%	5,489	11%	4,070	7%	3,521	5%	2,794	5%	2,425	8%	1,453	8%	21,704	7%
\$35,000 - \$49,999	2,624	18%	9,512	19%	8,648	14%	7,920	11%	5,801	11%	3,824	13%	2,403	13%	40,732	14%
\$50,000 - \$74,999	2,696	18%	13,167	26%	14,648	24%	15,287	22%	10,862	20%	6,268	21%	3,462	19%	66,390	22%
\$75,000 - \$99,999	1,331	9%	10,062	20%	14,477	23%	16,569	24%	13,347	25%	5,147	18%	3,202	17%	64,135	21%
\$100,000 - \$149,999	673	5%	4,664	9%	11,188	18%	15,319	22%	10,814	20%	4,295	15%	1,700	9%	48,653	16%
\$150,000 - \$199,999	316	2%	959	2%	2,595	4%	5,142	7%	3,655	7%	1,405	5%	752	4%	14,824	5%
\$200,000 and Over	224	2%	483	1%	1,299	2%	1,945	3%	1,866	3%	1,327	5%	627	3%	7,771	3%
<b>TOTAL</b>	<b>14,814</b>	<b>100%</b>	<b>50,270</b>	<b>100%</b>	<b>61,711</b>	<b>100%</b>	<b>70,144</b>	<b>100%</b>	<b>53,922</b>	<b>100%</b>	<b>29,207</b>	<b>100%</b>	<b>18,346</b>	<b>100%</b>	<b>298,414</b>	<b>100%</b>
<b>Percent of Total</b>	<b>5%</b>		<b>17%</b>		<b>21%</b>		<b>24%</b>		<b>18%</b>		<b>10%</b>		<b>6%</b>		<b>100%</b>	

HOUSEHOLDS BY INCOME



HOUSEHOLDS BY AGE



SOURCE: ESRI Business Analyst; RCLCO

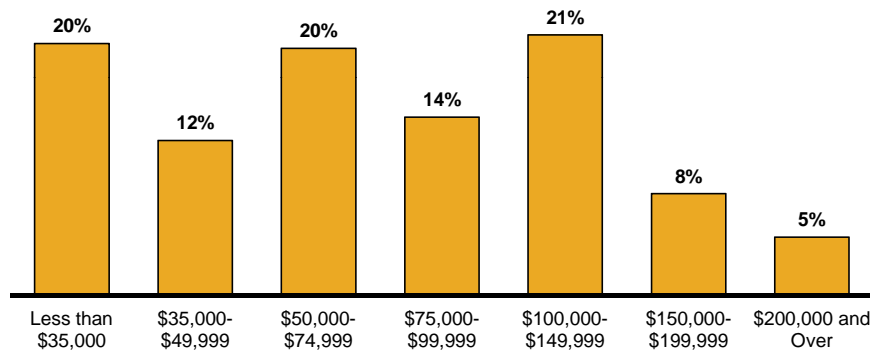
# M-NCPPC

Exhibit II-28

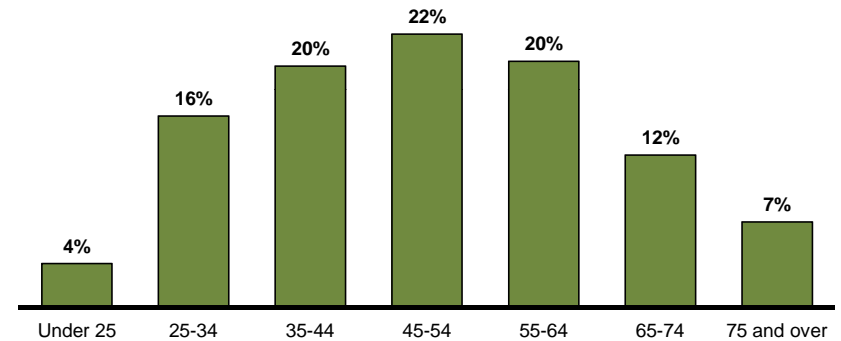
## HOUSEHOLDS BY AGE AND INCOME PRINCE GEORGE'S COUNTY, MD 2014

INCOME RANGE	UNDER 25		PROFESSIONALS				EMPTY NESTERS				RETIREES				TOTAL	
			25-34		35-44		45-54		55-64		65-74		75 AND OVER			
	TOTAL	PCT.	TOTAL	PCT.	TOTAL	PCT.	TOTAL	PCT.	TOTAL	PCT.	TOTAL	PCT.	TOTAL	PCT.	TOTAL	PCT.
Less than \$25,000	3,388	31%	6,645	14%	5,337	9%	5,512	8%	6,799	11%	4,795	13%	4,715	22%	37,191	12%
\$25,000 - \$34,999	1,861	17%	4,728	10%	3,904	6%	3,873	6%	3,378	5%	3,636	10%	3,514	16%	24,894	8%
\$35,000 - \$49,999	1,671	15%	6,961	15%	7,392	12%	6,546	10%	6,053	10%	5,419	14%	4,134	19%	38,176	12%
\$50,000 - \$74,999	2,154	20%	10,211	21%	12,197	20%	12,667	19%	11,146	18%	8,057	21%	4,489	21%	60,921	20%
\$75,000 - \$99,999	912	8%	7,379	15%	9,561	16%	9,498	14%	9,047	15%	5,801	15%	1,749	8%	43,947	14%
\$100,000 - \$149,999	784	7%	8,805	18%	13,411	22%	18,166	27%	14,532	24%	6,520	17%	1,962	9%	64,180	21%
\$150,000 - \$199,999	153	1%	2,153	4%	5,535	9%	7,889	12%	6,726	11%	2,145	6%	472	2%	25,073	8%
\$200,000 and Over	48	0%	1,026	2%	3,033	5%	4,226	6%	3,895	6%	1,769	5%	341	2%	14,338	5%
<b>TOTAL</b>	10,971	100%	47,908	100%	60,370	100%	68,377	100%	61,576	100%	38,142	100%	21,376	100%	308,720	100%
<b>Percent of Total</b>	4%		16%		20%		22%		20%		12%		7%		100%	

HOUSEHOLDS BY INCOME



HOUSEHOLDS BY AGE



SOURCE: ESRI Business Analyst; RCLCO

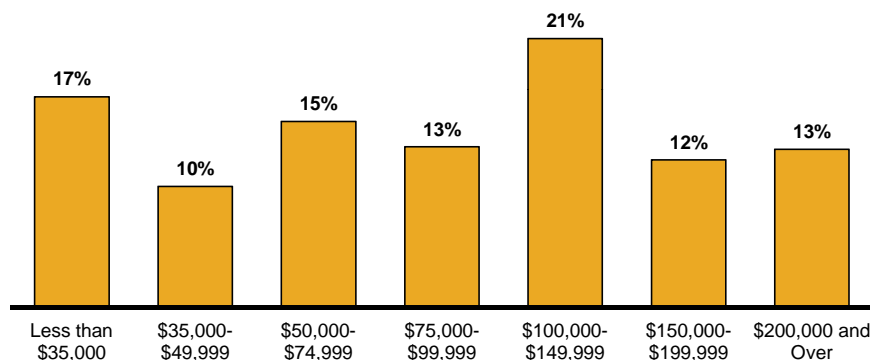
# M-NCPPC

Exhibit II-29

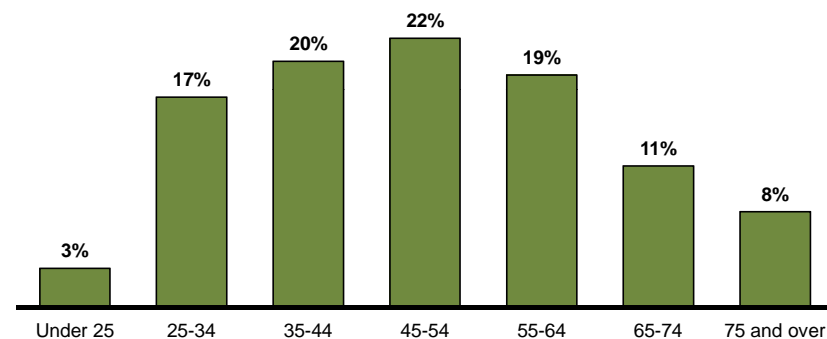
## HOUSEHOLDS BY AGE AND INCOME WASHINGTON-ARLINGTON-ALEXANDRIA, DC-VA-MD-WV MSA 2014

INCOME RANGE	UNDER 25		PROFESSIONALS				EMPTY NESTERS				RETIREES				TOTAL	
			25-34		35-44		45-54		55-64		65-74		75 AND OVER			
	TOTAL	PCT.	TOTAL	PCT.	TOTAL	PCT.	TOTAL	PCT.	TOTAL	PCT.	TOTAL	PCT.	TOTAL	PCT.	TOTAL	PCT.
Less than \$25,000	17,749	26%	41,864	11%	31,613	7%	33,399	7%	40,191	10%	30,957	12%	37,061	22%	232,834	11%
\$25,000 - \$34,999	8,296	12%	28,549	8%	21,734	5%	19,911	4%	17,695	4%	18,478	7%	19,301	11%	133,964	6%
\$35,000 - \$49,999	10,237	15%	47,510	13%	38,087	9%	31,463	7%	28,044	7%	26,658	11%	28,799	17%	210,798	10%
\$50,000 - \$74,999	12,958	19%	61,946	17%	62,153	14%	56,586	12%	52,933	13%	42,572	17%	34,711	21%	323,859	15%
\$75,000 - \$99,999	8,241	12%	58,354	16%	62,169	14%	51,969	11%	51,405	13%	34,440	14%	13,550	8%	280,128	13%
\$100,000 - \$149,999	7,974	12%	82,803	22%	95,094	22%	125,715	26%	90,937	22%	46,415	19%	19,687	12%	468,625	21%
\$150,000 - \$199,999	2,485	4%	31,212	8%	68,404	16%	68,905	14%	57,128	14%	22,241	9%	6,403	4%	256,778	12%
\$200,000 and Over	1,249	2%	19,699	5%	56,064	13%	88,030	18%	72,758	18%	28,184	11%	9,489	6%	275,473	13%
<b>TOTAL</b>	<b>69,189</b>	<b>100%</b>	<b>371,937</b>	<b>100%</b>	<b>435,318</b>	<b>100%</b>	<b>475,978</b>	<b>100%</b>	<b>411,091</b>	<b>100%</b>	<b>249,945</b>	<b>100%</b>	<b>169,001</b>	<b>100%</b>	<b>2,182,459</b>	<b>100%</b>
<b>Percent of Total</b>	<b>3%</b>		<b>17%</b>		<b>20%</b>		<b>22%</b>		<b>19%</b>		<b>11%</b>		<b>8%</b>		<b>100%</b>	

HOUSEHOLDS BY INCOME



HOUSEHOLDS BY AGE



SOURCE: ESRI Business Analyst; RCLCO

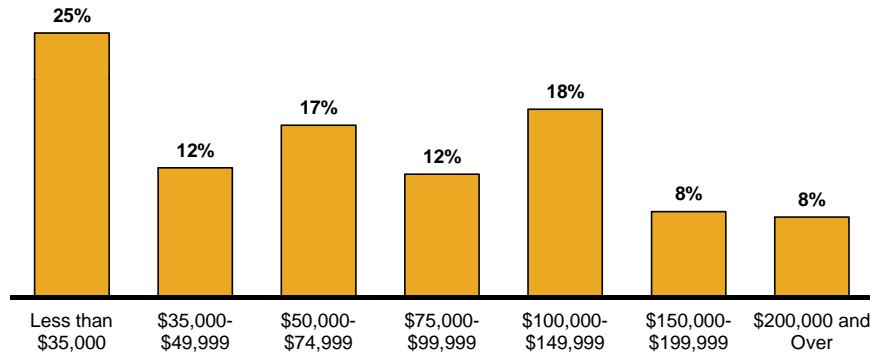
# M-NCPPC

Exhibit II-30

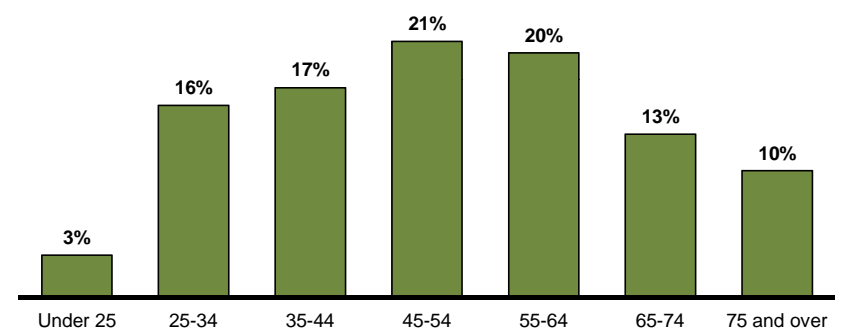
## HOUSEHOLDS BY AGE AND INCOME BALTIMORE-COLUMBIA-TOWSON, MD MSA 2014

INCOME RANGE	UNDER 25		PROFESSIONALS				EMPTY NESTERS				RETIREES				TOTAL	
			25-34		35-44		45-54		55-64		65-74		75 AND OVER			
	TOTAL	PCT.	TOTAL	PCT.	TOTAL	PCT.	TOTAL	PCT.	TOTAL	PCT.	TOTAL	PCT.	TOTAL	PCT.	TOTAL	PCT.
Less than \$25,000	13,094	36%	27,966	17%	20,557	11%	25,929	12%	32,775	16%	25,177	18%	33,074	30%	178,572	17%
\$25,000 - \$34,999	5,072	14%	16,012	10%	12,196	7%	13,326	6%	13,106	6%	13,688	10%	16,424	15%	89,824	8%
\$35,000 - \$49,999	5,711	16%	25,186	15%	19,098	11%	19,591	9%	20,044	10%	20,530	15%	21,436	20%	131,596	12%
\$50,000 - \$74,999	6,419	18%	32,119	19%	28,454	16%	31,058	14%	31,335	15%	26,313	19%	19,269	18%	174,967	17%
\$75,000 - \$99,999	2,750	8%	22,619	14%	23,401	13%	25,817	12%	26,217	12%	17,798	13%	6,402	6%	125,004	12%
\$100,000 - \$149,999	2,294	6%	28,681	17%	40,348	22%	51,615	23%	40,836	19%	19,708	14%	7,559	7%	191,041	18%
\$150,000 - \$199,999	544	2%	7,527	5%	20,052	11%	26,486	12%	22,745	11%	7,794	6%	2,078	2%	87,226	8%
\$200,000 and Over	274	1%	4,783	3%	15,826	9%	26,016	12%	22,972	11%	9,187	7%	2,500	2%	81,558	8%
<b>TOTAL</b>	<b>36,158</b>	<b>100%</b>	<b>164,893</b>	<b>100%</b>	<b>179,932</b>	<b>100%</b>	<b>219,838</b>	<b>100%</b>	<b>210,030</b>	<b>100%</b>	<b>140,195</b>	<b>100%</b>	<b>108,742</b>	<b>100%</b>	<b>1,059,788</b>	<b>100%</b>
<b>Percent of Total</b>	<b>3%</b>		<b>16%</b>		<b>17%</b>		<b>21%</b>		<b>20%</b>		<b>13%</b>		<b>10%</b>		<b>100%</b>	

HOUSEHOLDS BY INCOME



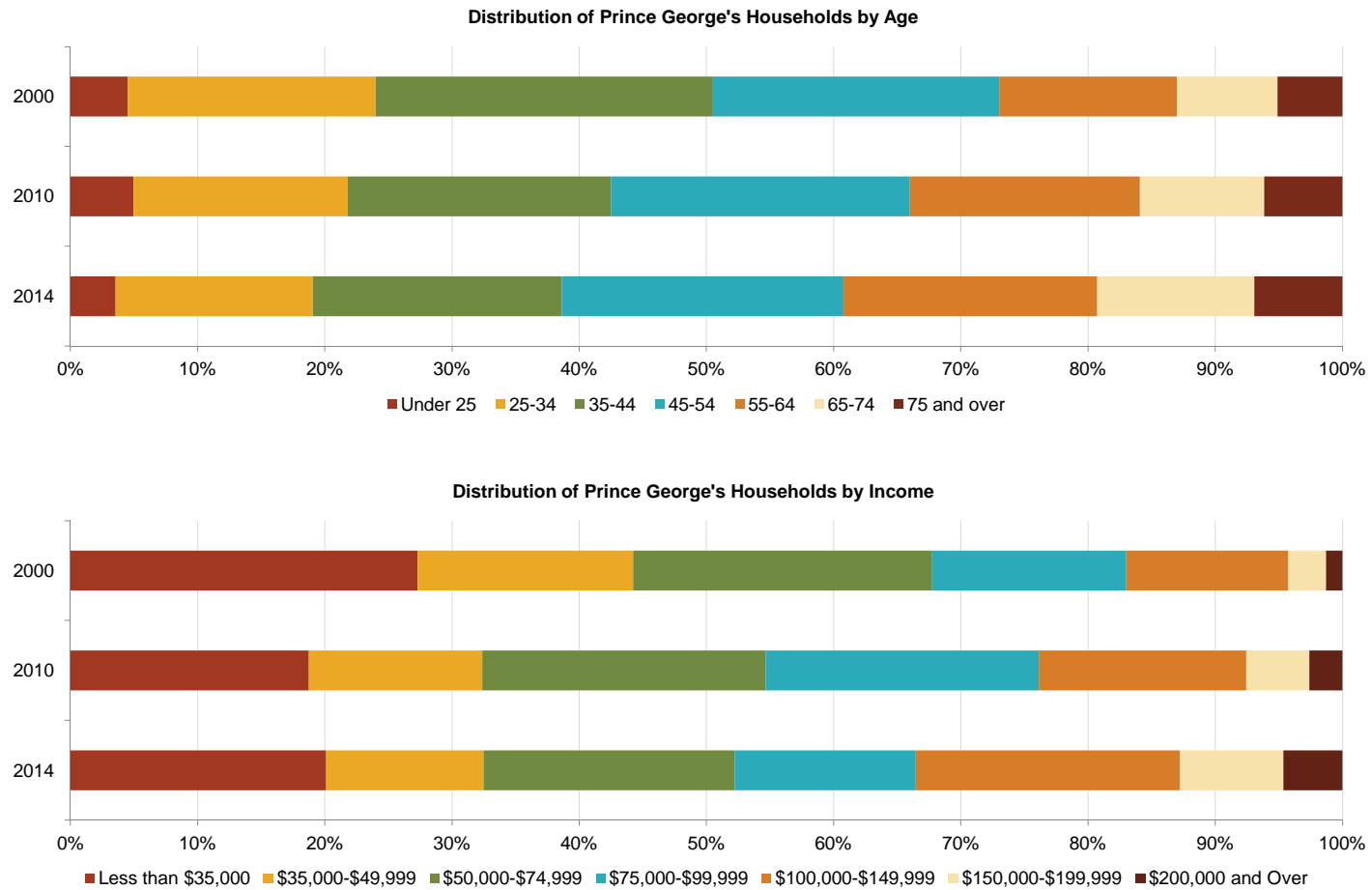
HOUSEHOLDS BY AGE



SOURCE: ESRI Business Analyst; RCLCO

Exhibit II-31

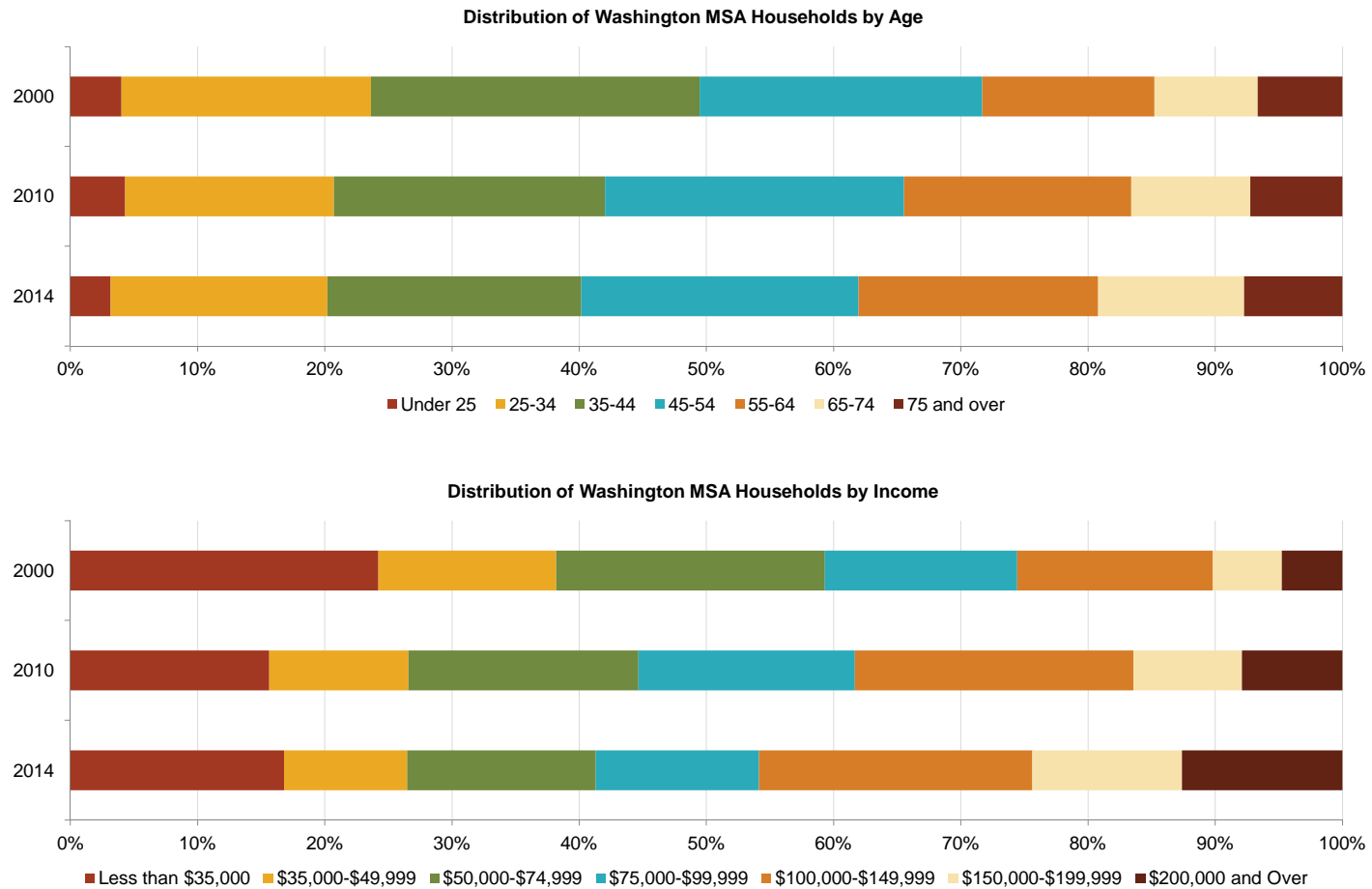
## DISTRIBUTION OF PRINCE GEORGE'S HOUSEHOLDS BY AGE AND BY INCOME PRINCE GEORGE'S COUNTY, MD 2000, 2010, AND 2014



SOURCE: Esri

Exhibit II-32

**DISTRIBUTION OF MSA HOUSEHOLDS BY AGE AND BY INCOME  
WASHINGTON-ARLINGTON-ALEXANDRIA, DC-VA-MD-WV MSA  
2000, 2010, AND 2014**

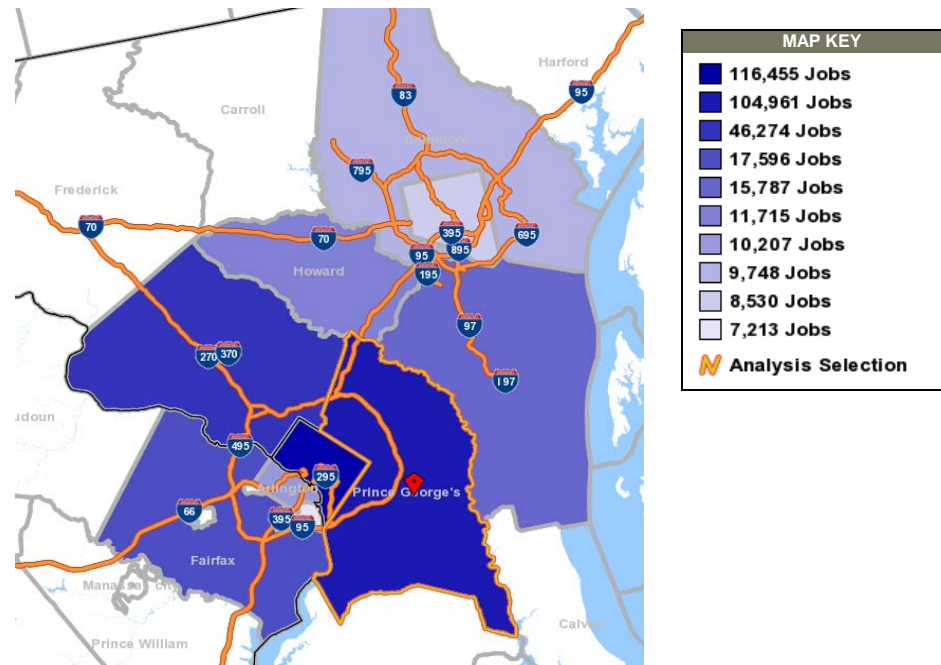


SOURCE: Esri

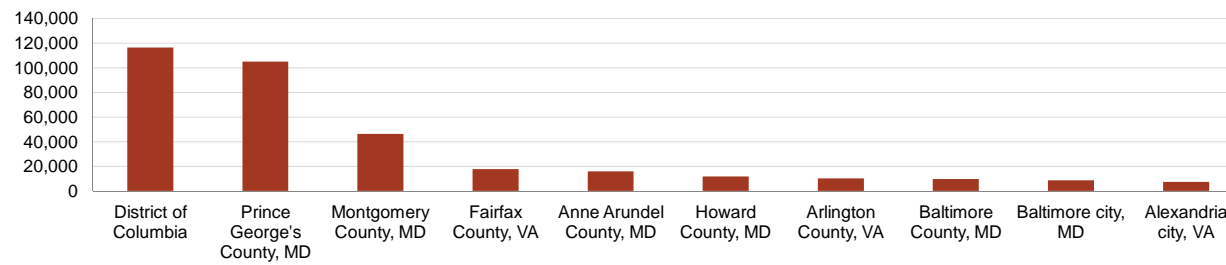


Exhibit II-33

## WHERE RESIDENTS OF PRINCE GEORGE'S COUNTY WORK PRINCE GEORGE'S COUNTY, MD 2011



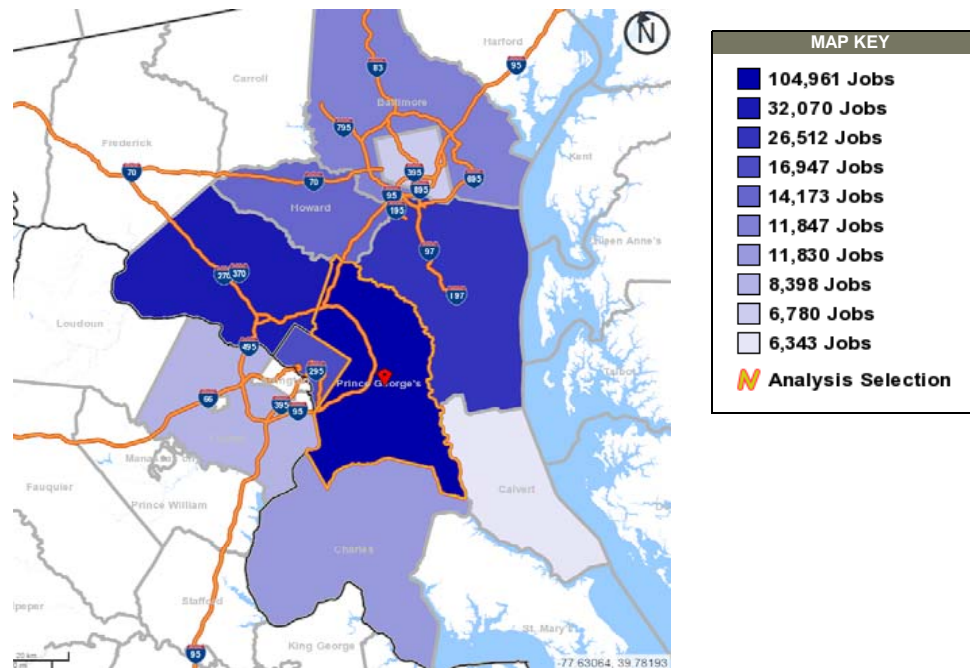
Distribution of Prince George's County Residents' Work County



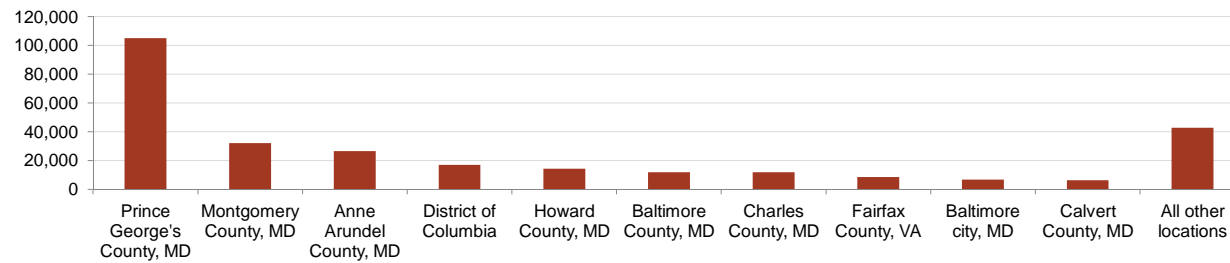
SOURCE: OnTheMap.gov

Exhibit II-34

## WHERE WORKERS OF PRINCE GEORGE'S COUNTY LIVE PRINCE GEORGE'S COUNTY, MD 2011



Distribution of Prince George's County Workers' Home County



SOURCE: OnTheMap.gov

*Exhibit II-35*

**COMMUTING STATISTICS BY COUNTY  
BALTIMORE-WASHINGTON REGION  
2011**

	Prince George's County	Montgomery County	Anne Arundel County	Howard County	Fairfax County
Total Primary Jobs	282,664	440,871	222,600	143,390	558,664
Workers Employed in County Living Elsewhere	177,703	233,048	129,653	107,226	332,540
Workers Employed in County Living in County	104,961	207,823	92,947	36,164	226,124
<b>% Workers Living in County</b>	<b>37.1%</b>	<b>47.1%</b>	<b>41.8%</b>	<b>25.2%</b>	<b>40.5%</b>

	Prince George's County	Montgomery County	Anne Arundel County	Howard County	Fairfax County
Total Households	374,328	426,015	228,611	133,677	481,821
County Households Working Elsewhere	269,367	218,192	135,664	97,513	255,697
County Households Employed in County	104,961	207,823	92,947	36,164	226,124
<b>% Households Employed in County</b>	<b>28.0%</b>	<b>48.8%</b>	<b>40.7%</b>	<b>27.1%</b>	<b>46.9%</b>

SOURCE: OnTheMap.gov; RCLCO



## III. CONSUMER SEGMENTATION

## Exhibit III-1

### DOMINANT CONSUMER PSYCHOGRAPHIC SEGMENTS WASHINGTON-BALTIMORE REGION, SELECT COUNTIES 2014

Consumer Segment	National Demographics						Household Budget Index				Share of Households in Each Geography					
	Average Median Income	Median Age	Average HH Size	Metro Location	Typical Housing	% Own	Average	Food	Apparel & Services	Entertainment & Recreation	Wash-Balt Region	Prince George's	Montgomery	Howard	Anne Arundel	Fairfax
Top Tier	\$157,000	46	2.8	Suburban	Single-Family	91%	235	246	178	280	6.9%	0.2%	16.0%	17.0%	7.2%	20.4%
Professional Pride	\$127,000	41	3.1	Suburban	Single-Family	92%	196	209	147	232	4.2%	2.3%	5.7%	15.5%	1.9%	7.0%
<b>First Tier</b>	<b>\$145,649</b>						<b>215</b>	<b>228</b>	<b>163</b>	<b>256</b>	<b>11%</b>	<b>3%</b>	<b>22%</b>	<b>33%</b>	<b>9%</b>	<b>27%</b>
Laptops and Lattes	\$93,000	37	1.9	Downtown	High-Density Apartments	38%	167	185	133	184	4.3%	0.0%	2.0%	0.5%	0.3%	1.5%
Urban Chic	\$98,000	43	2.4	Suburban	Single-Family	67%	161	174	122	187	3.3%	0.5%	5.8%	6.7%	3.7%	8.0%
Boomburbs	\$105,000	34	3.2	Suburban	Single-Family	85%	159	172	119	186	3.3%	1.1%	2.7%	1.2%	0.3%	1.2%
Savvy Suburbanites	\$104,000	44	2.8	Suburban	Single-Family	91%	156	167	116	184	7.6%	5.4%	7.2%	8.5%	13.2%	6.2%
Exurbanites	\$98,000	50	2.5	Suburban	Single-Family	85%	154	165	114	182	2.3%	1.2%	2.7%	4.2%	7.4%	1.6%
<b>Second Tier</b>	<b>\$100,269</b>						<b>159</b>	<b>173</b>	<b>121</b>	<b>185</b>	<b>21%</b>	<b>8%</b>	<b>20%</b>	<b>21%</b>	<b>25%</b>	<b>19%</b>
Pacific Heights	\$84,000	42	3.1	Urban Neighborhood	Single-Family	72%	128	138	96	150	0.3%	0.0%	1.2%	0.7%	0.0%	1.2%
Pleasantville	\$85,000	42	2.9	Suburban	Single-Family	84%	126	136	95	148	6.9%	18.8%	8.9%	2.1%	12.7%	6.7%
Soccer Moms	\$84,000	37	3.0	Suburban	Single-Family	86%	124	135	92	145	3.3%	3.5%	0.2%	1.3%	4.0%	0.1%
Enterprising Professionals	\$77,000	35	2.5	Suburban	Multiunits; Single-Family	52%	122	135	94	138	11.0%	8.7%	16.2%	28.0%	14.8%	24.7%
<b>Third Tier</b>	<b>\$80,740</b>						<b>125</b>	<b>136</b>	<b>94</b>	<b>145</b>	<b>22%</b>	<b>31%</b>	<b>27%</b>	<b>32%</b>	<b>32%</b>	<b>33%</b>
Golden Years	\$61,000	51	2.1	Suburban	Single-Family; Multiunits	64%	112	124	84	129	2.7%	1.2%	2.3%	3.3%	1.8%	3.6%
In Style	\$66,000	41	2.3	Close-In Suburbs	Single-Family	69%	108	119	81	125	0.6%	0.3%	0.0%	0.7%	1.0%	0.0%
Comfortable Empty Nesters	\$68,000	47	2.5	Suburban	Single-Family	88%	104	114	76	123	1.0%	1.3%	0.0%	0.0%	1.3%	0.0%
City Lights	\$60,000	39	2.6	Urban Neighborhood	Multiunits; Single-Family	53%	100	110	77	112	2.3%	4.2%	5.1%	2.8%	1.8%	3.4%
Home Improvement	\$67,000	37	2.9	Suburban	Single-Family	80%	100	109	74	116	1.9%	4.0%	1.0%	0.9%	2.6%	0.1%
Metro renters	\$52,000	32	1.7	Downtown	Multiunit Rentals	21%	98	111	79	104	4.9%	0.4%	5.9%	0.0%	0.6%	4.8%
<b>Fourth Tier</b>	<b>\$59,134</b>						<b>104</b>	<b>115</b>	<b>79</b>	<b>118</b>	<b>13%</b>	<b>11%</b>	<b>14%</b>	<b>8%</b>	<b>9%</b>	<b>12%</b>
Up and Coming Families	\$64,000	31	3.1	Suburban	Single-Family	75%	96	106	72	111	0.8%	0.4%	0.0%	0.9%	0.0%	0.0%
Trendsetters	\$51,000	36	2.1	Downtown	High-Density Apartments	25%	93	105	74	101	2.0%	0.4%	2.7%	0.0%	0.0%	0.5%
Urban Villages	\$58,000	33	3.8	Urban Neighborhood	Single-Family	70%	90	101	67	103	0.8%	3.1%	1.9%	0.0%	0.0%	0.5%
Emerald City	\$52,000	37	2.1	Close-In Suburbs	Single-Family; Multiunits	50%	89	99	68	100	1.0%	0.8%	0.6%	0.0%	0.3%	0.5%
Parks and Rec	\$55,000	40	2.5	Suburban	Single-Family	71%	85	94	64	98	3.2%	1.7%	0.0%	0.0%	8.2%	0.0%
Bright Young Professionals	\$50,000	32	2.4	Urban Neighborhood	Single-Family; Multiunits	44%	80	89	61	89	2.9%	6.6%	0.8%	4.3%	4.2%	0.9%
<b>Fifth Tier</b>	<b>\$53,514</b>						<b>89</b>	<b>99</b>	<b>68</b>	<b>100</b>	<b>11%</b>	<b>13%</b>	<b>6%</b>	<b>5%</b>	<b>13%</b>	<b>2%</b>
American Dreamers	\$48,000	32	3.2	Urban Neighborhood	Single-Family	65%	73	82	55	83	0.7%	1.9%	0.5%	0.0%	0.6%	0.4%
International Marketplace	\$41,000	32	3.0	Urban Neighborhood	High-Density Apartments; Single-Family	28%	73	83	58	77	1.0%	2.0%	1.3%	0.0%	0.0%	2.9%
City Strivers	\$41,000	34	2.8	Downtown	High-Density Apartments	33%	72	81	58	77	2.4%	4.6%	0.5%	0.5%	5.0%	0.1%
Military Proximity	\$41,000	22	3.3	Suburban	Townhomes; Multiunit Rentals	3%	69	81	56	71	0.3%	0.3%	0.0%	0.0%	1.2%	0.5%
<b>Sixth Tier</b>	<b>\$42,114</b>						<b>72</b>	<b>82</b>	<b>57</b>	<b>77</b>	<b>4%</b>	<b>9%</b>	<b>2%</b>	<b>1%</b>	<b>7%</b>	<b>4%</b>
Old and Newcomers	\$39,000	39	2.1	Close-In Suburbs	Single-Family; Multiunits	46%	68	77	51	76	0.6%	0.5%	0.3%	0.0%	1.7%	0.0%
Front Porches	\$39,000	34	2.6	Close-In Suburbs	Single-Family; Multiunits	48%	65	73	50	73	1.5%	0.7%	0.0%	0.0%	1.4%	0.2%
Family Foundations	\$40,000	39	2.7	Urban Neighborhood	Single-Family	67%	65	73	48	74	2.4%	8.1%	0.0%	0.0%	0.0%	0.0%
The Elders	\$35,000	72	1.7	Suburban	Single-Family; High-Rises; Seasonal	82%	64	71	45	76	0.6%	0.0%	2.3%	0.0%	0.9%	0.0%
Young and Restless	\$36,000	29	2.0	Close-In Suburbs	Multiunit Rentals	14%	61	70	49	65	1.5%	2.0%	2.2%	0.5%	1.6%	1.1%
College Towns	\$28,000	24	2.1	Urban Neighborhood	Multiunit Rentals; Single-Family	25%	59	67	47	63	0.3%	0.5%	0.0%	0.0%	0.0%	0.0%
Metro Fusion	\$33,000	29	2.6	Urban Neighborhood	Multiunits; Single-Family	25%	56	64	44	60	2.2%	8.3%	1.5%	0.0%	1.3%	1.0%
NeWest Residents	\$28,000	27	3.3	Downtown	Multiunit Rentals	17%	51	60	40	52	0.5%	2.1%	1.1%	0.0%	0.0%	0.2%
<b>Seventh Tier</b>	<b>\$36,240</b>						<b>61</b>	<b>69</b>	<b>47</b>	<b>67</b>	<b>10%</b>	<b>22%</b>	<b>7%</b>	<b>1%</b>	<b>7%</b>	<b>3%</b>

Note: Segments shown above represent 91% of total households in the region and 97-100% of households in the selected counties.  
SOURCE: ESRI Tapestry Segmentation; RCLCO

# M-NCPPC

## Exhibit III-2

### DOMINANT CONSUMER PSYCHOGRAPHIC SEGMENTS WASHINGTON-BALTIMORE REGION, SELECT COUNTIES 2014

Consumer Segment	Share of Households in Each Geography															
	Prince George's County	North	Central Inside I-495	Central Outside I-495	South-west	South-east	North				Central Inside I-495	Central Outside I-495		Southwest		Southeast
							Langley Park - Hyattsville	College Park	Laurel	Cheverly-New Carrollton		Bowie	Marlboro-Westphalia	Branch Avenue	Southwest	
Total Households	308,726	123,547	40,799	65,279	69,404	9,697	34,567	23,574	26,893	38,513	40,799	50,787	14,492	41,912	27,492	9,697
Top Tier	0.2%	0%	0%	1%	0%	0%						507.87				
Professional Pride	2%	0%	0%	7%	2%	15%						4,317			1,292	1,416
First Tier	3%	0%	0%	7%	2%	15%	0%	0%	0%	0%	0%	10%	0%	0%	5%	15%
Laptops and Lattes	0%	0%	0%	0%	0%	0%										
Urban Chic	1%	1%	0%	0%	0%	0%	1,417									
Boomburbs	1%	0%	0%	5%	0%	0%						1,778	1,580			
Savvy Suburbanites	5%	3%	0%	14%	4%	4%			3,657			8,888	362	1,048	2,034	427
Exurbanites	1%	0%	0%	2%	2%	6%						406	1,203		1,485	543
Second Tier	8%	4%	0%	22%	7%	10%	4%	0%	14%	0%	0%	22%	22%	3%	13%	10%
Pacific Heights	0%	0%	0%	0%	0%	0%										
Pleasantville	19%	10%	2%	28%	35%	23%	864	4,856	1,264	5,661	612	14,982	3,522	13,496	10,584	2,211
Soccer Moms	4%	0%	0%	9%	4%	19%						1,778	4,072	1,676	1,430	1,833
Enterprising Professionals	9%	10%	3%	18%	1%	9%		2,287	8,229	1,849	1,183	9,294	2,377	922		844
Third Tier	31%	20%	4%	55%	40%	50%	3%	30%	35%	20%	4%	51%	69%	38%	44%	50%
Golden Years	1%	0%	0%	2%	3%	0%						1,524		2,347		
In Style	0%	0%	0%	1%	0%	0%		519					507			
Comfortable Empty Nesters	1%	1%	2%	0%	3%	0%		1,084			694			1,006	1,237	
City Lights	4%	9%	0%	1%	2%	0%	4,321	2,051	1,936	2,657		457		964	687	
Home Improvement	4%	2%	7%	6%	3%	5%		495	672	1,502	2,774	3,352	464	1,006	1,182	475
Metro renters	0%	1%	0%	0%	0%	0%		825	511							
Fourth Tier	11%	13%	9%	10%	12%	5%	13%	21%	12%	11%	9%	11%	7%	13%	11%	5%
Up and Coming Families	0%	0%	0%	0%	0%	11%										1,086
Trendsetters	0%	1%	0%	0%	0%	0%		1,132								
Urban Villages	3%	8%	0%	0%	0%	0%	4,390		377	4,776						
Emerald City	1%	2%	0%	0%	0%	0%		2,145	350							
Parks and Rec	2%	3%	1%	0%	2%	0%	1,625			1,810	571			1,215		
Bright Young Professionals	7%	6%	14%	4%	7%	0%	1,417		3,389	2,234	5,753	2,895		3,604	1,100	
Fifth Tier	13%	19%	16%	4%	9%	11%	22%	14%	15%	23%	16%	6%	0%	12%	4%	11%
American Dreamers	2%	3%	3%	0%	1%	0%	933	660		2,465	1,102				797	
International Marketplace	2%	5%	0%	1%	0%	0%	3,111	542		2,118		406				
City Strivers	5%	3%	13%	0%	8%	0%				3,466	5,181			4,736	742	
Military Proximity	0%	0%	0%	0%	1%	0%								1,006		
Sixth Tier	9%	11%	15%	1%	10%	0%	12%	5%	0%	21%	15%	1%	0%	14%	6%	0%
Old and Newcomers	1%	1%	0%	0%	0%	0%			726	847						
Front Porches	1%	1%	1%	0%	0%	0%			672		530			335		
Family Foundations	8%	2%	36%	0%	12%	0%				1,887	14,688	305		4,736	3,519	
The Elders	0%	0%	0%	0%	0%	0%										
Young and Restless	2%	5%	0%	0%	0%	0%	2,143	825	2,259	924						
College Towns	1%	1%	0%	0%	0%	0%	726	919								
Metro Fusion	8%	12%	13%	0%	8%	0%	5,220	3,395	2,340	3,967	5,345			3,814	1,430	
NeWest Residents	2%	5%	0%	0%	0%	0%	4,632			1,772						
Seventh Tier	22%	27%	50%	0%	20%	0%	37%	22%	22%	24%	50%	1%	0%	21%	18%	0%
Total Households	308,726						34,567	23,574	26,893	38,513	40,799	50,787	14,492	41,912	27,492	9,697

SOURCE: ESRI Tapestry Segmentation; RCLCO



## 2014

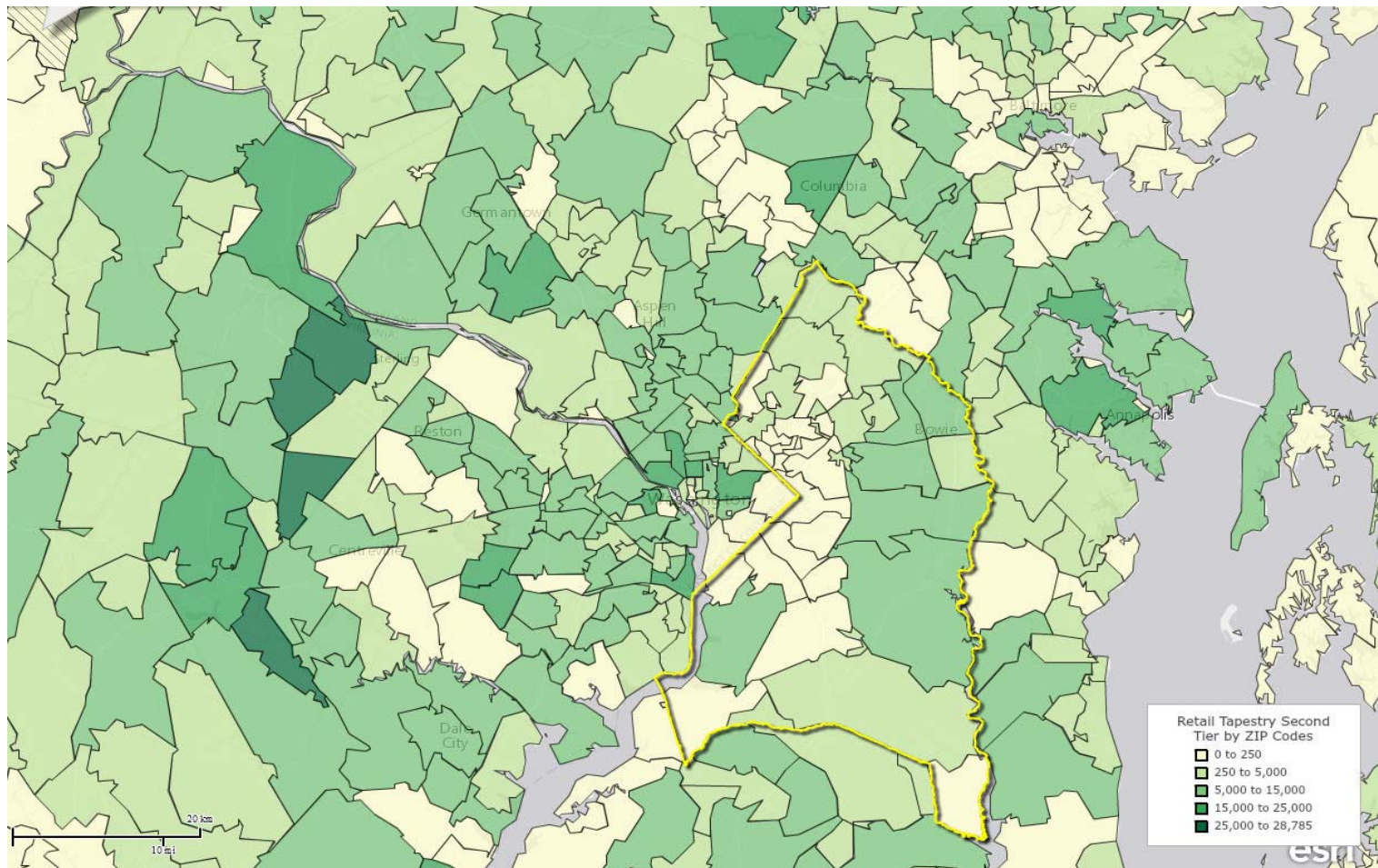


**RCLCO**  
ROBERT CHARLES LESSER & CO.



## Exhibit III-4

### MAP OF SECOND TIER TAPESTRY HOUSEHOLDS BY ZIPCODE WASHINGTON-BALTIMORE REGION 2014



SOURCE: ESRI; RCLCO

**Retail Tapestry Third Tier by ZIP Codes**

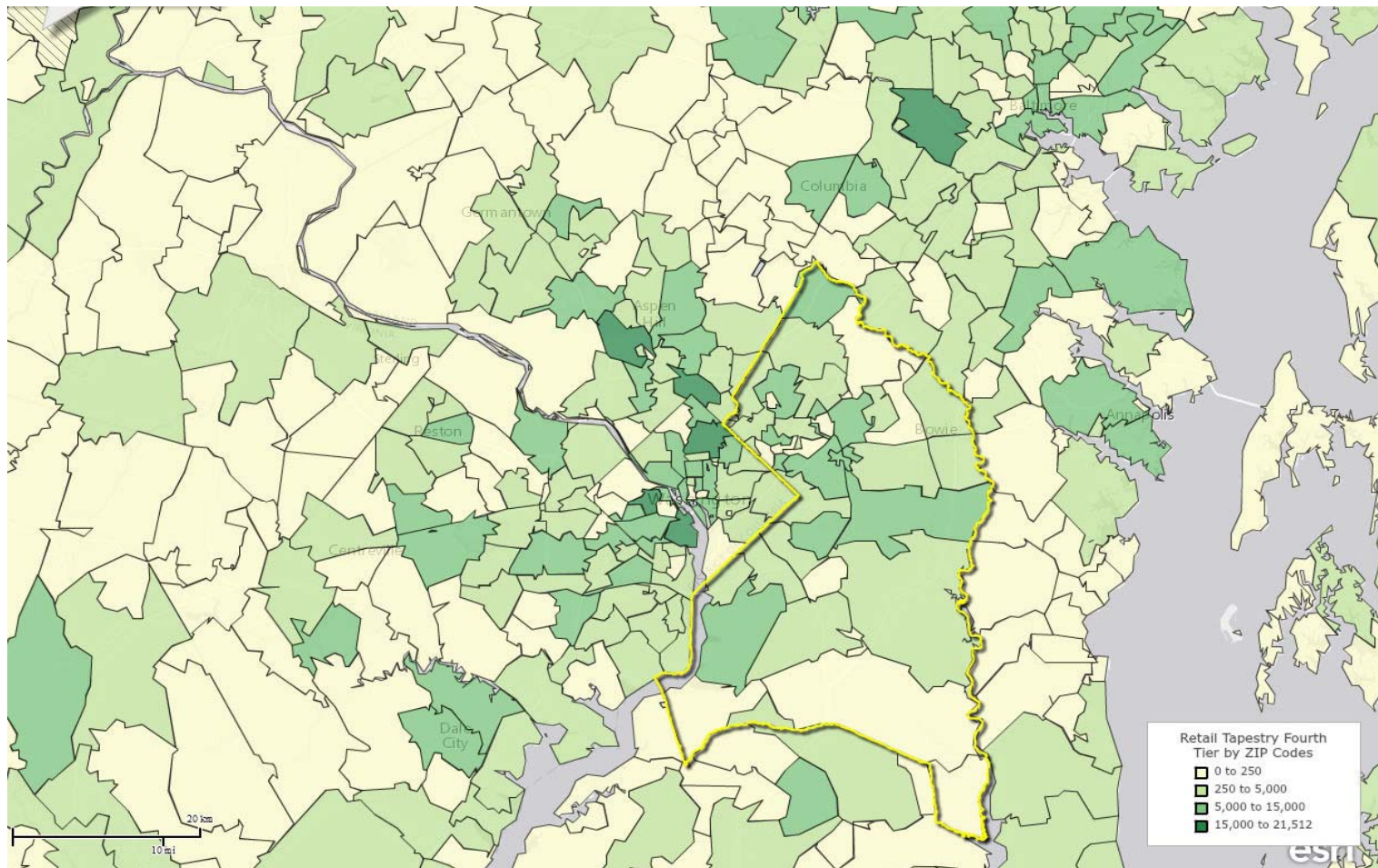
- 0 to 250
- 250 to 5,000
- 5,000 to 15,000
- 15,000 to 25,000
- 25,000 to 40,209

**RCLCO**  
ROBERT CHARLES LESSER & CO.



## Exhibit III-6

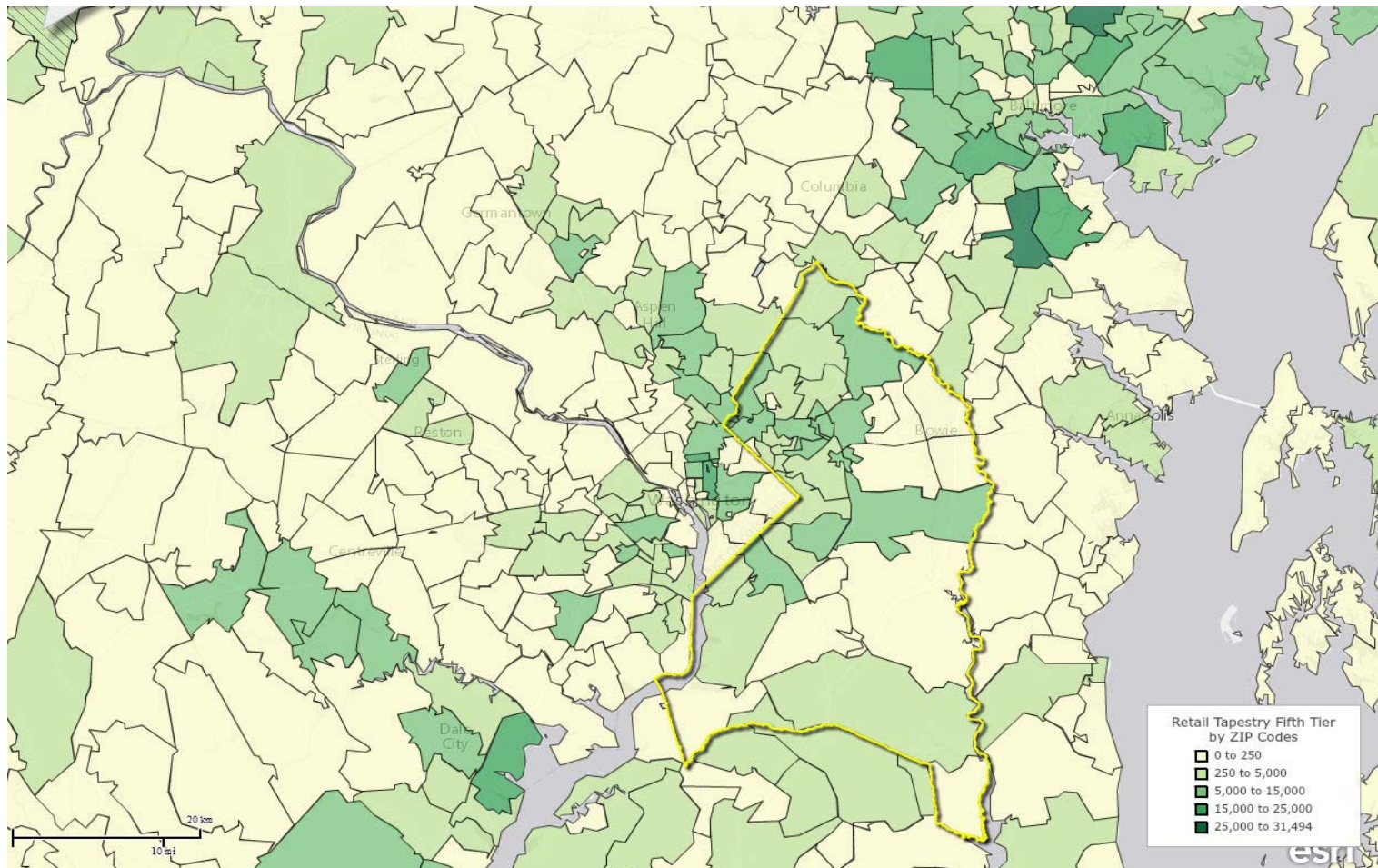
### MAP OF FOURTH TIER TAPESTRY HOUSEHOLDS BY ZIPCODE WASHINGTON-BALTIMORE REGION 2014



SOURCE: ESRI; RCLCO

## Exhibit III-7

### MAP OF FIFTH TIER TAPESTRY HOUSEHOLDS BY ZIPCODE WASHINGTON-BALTIMORE REGION 2014

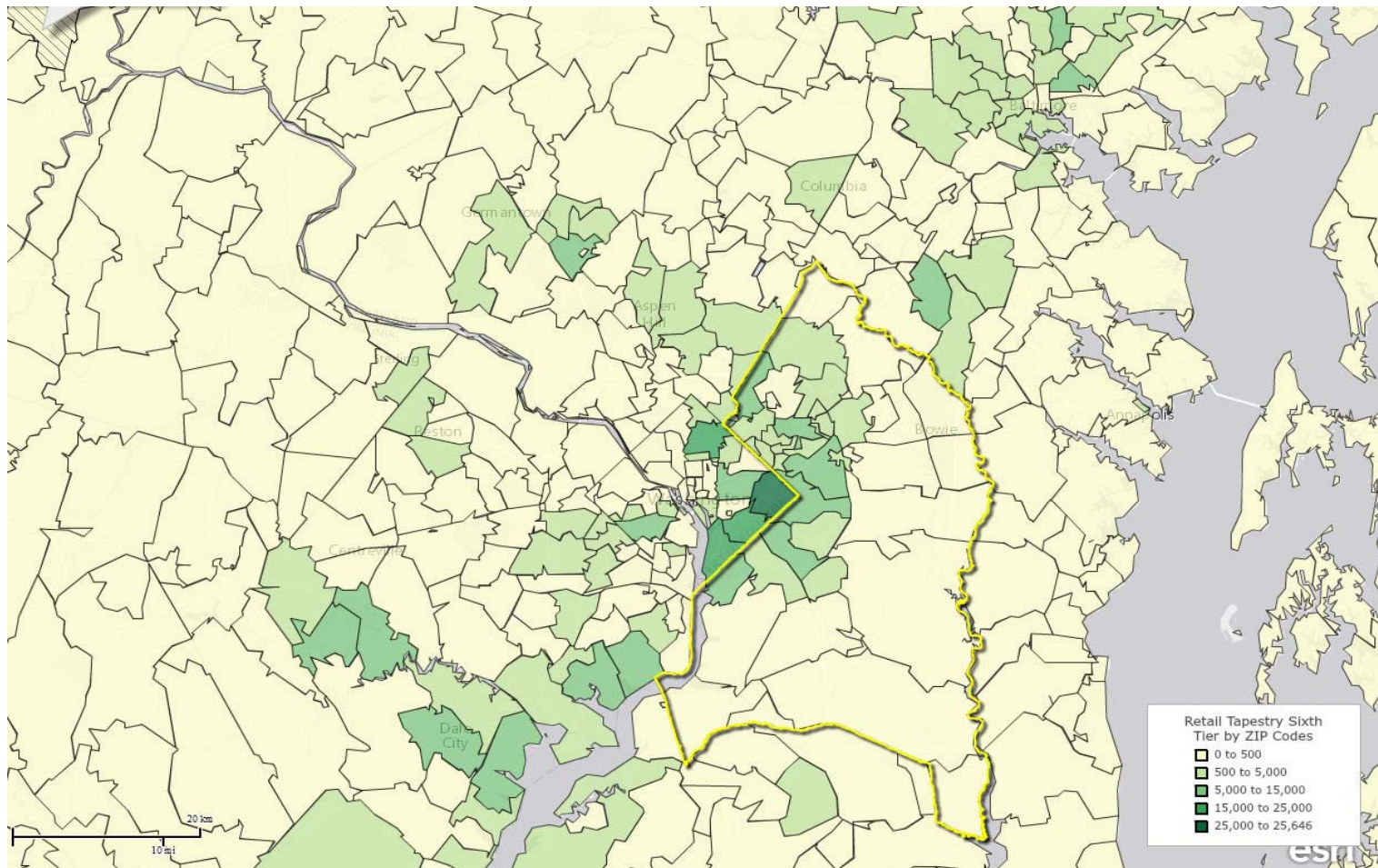


SOURCE: ESRI; RCLCO



## Exhibit III-8

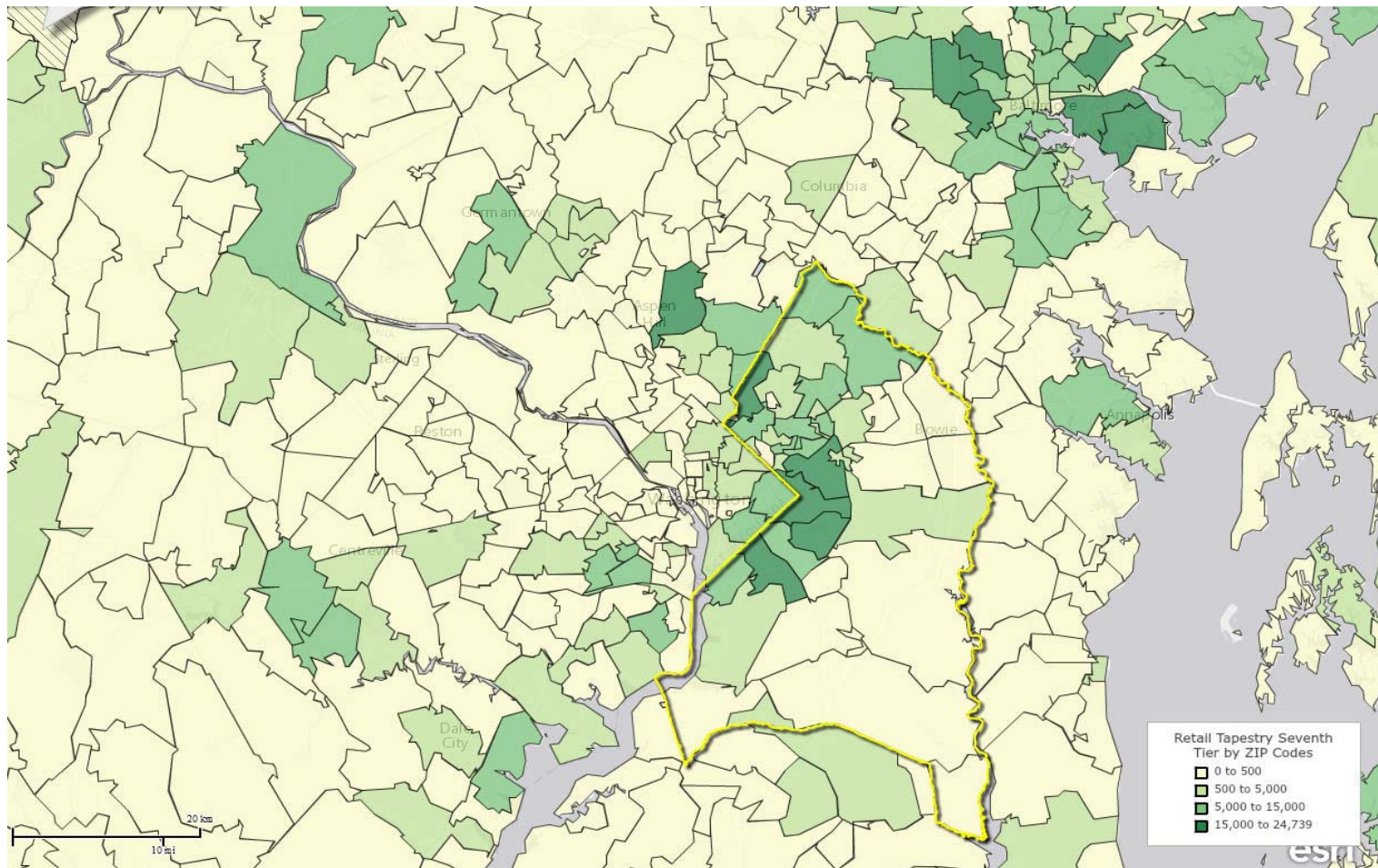
### MAP OF SIXTH TIER TAPESTRY HOUSEHOLDS BY ZIPCODE WASHINGTON-BALTIMORE REGION 2014



SOURCE: ESRI; RCLCO

## Exhibit III-9

### MAP OF SIXTH TIER TAPESTRY HOUSEHOLDS BY ZIPCODE WASHINGTON-BALTIMORE REGION 2014



SOURCE: ESRI; RCLCO

## **IV. RESULTS OF RCLCO RETAIL INVENTORY**

## Exhibit IV-1

### INVENTORY OF SHOPPING CENTERS FROM RETAIL SURVEY PRINCE GEORGE'S COUNTY, MD OCTOBER 2014

Center Name	Center Address	Local Trade Area	RCLCO Center Type	Year Built	Year Renovated	Level of repair/ reinvestment	Quality of Tenants	Center RBA/ GLA	Occupied GBA	Percent Leased	Number Of Stores	Anchor GLA (SF)	RCLCO Anchor	RCLCO Junior Anchor	RCLCO Grocery Anchor	RCLCO In-line Tenants/Mix	Land Area (AC)	Number of Parking Spaces	Average Weighted Rent
Steeplechase 95	00 Ritchie Marlboro Rd	Central Inside I-495	Strip/ Convenience	2008		A	National - mid	61,063	61,063	100%			0	0	0	Mostly fast casual restaurants; hair salon and dentist office	6.0	265	-
Olde Forte Village	1 Swan Creek Rd	Southwest	Community Center	1981	2003	A-	Regional - mid	136,841	130,177	95%	43		Safeway	Advance Auto Parts, Dollar Tree	Safeway	60% salons, fast food, electronics, health clinic	112.5	1,077	Withheld
Eastover Shopping Center	10 Audrey Ln	Southwest	Community Center	1953	1993	C+	Regional - mid	269,621	238,642	89%	54	94,490	Giant	Dollar Tree, CVS	Giant	60% restaurants, cleaners, tax services, barber and salons, wireless carriers	76.8	2,320	Withheld
Hollywood Square	10005-10013 Rhode Island Ave	College Park	Strip/ Convenience	1970		C	Local - low	12,091	12,091	100%			0	0	0	Video; Bakery; Car rental	0.5	36	-
Lake Arbor Village Shopping Center	10200-10274 Lake Arbor Way	Bowie	Neighborhood Center	1990		C+	Local - low	57,296	51,761	90%	26		0	0	0	Nearly 100% food and service oriented	5.7	220	\$21.96
Vista Gardens Marketplace	10201-10651 Martin Luther King Jr. Hwy	Bowie	Power Center	2006		A+	National - mid	256,072	254,151	99%		267,359	Shoppers, Home Depot, Target	Office Depot	Shoppers	Food, services	65.7	2,655	Withheld
The Village at North College Park	10240 Baltimore Ave	College Park	Neighborhood Center	2007		A	Local - mid	82,294	82,294	100%			0	0	0	0	6.4	267	Withheld
Greenbelt Roosevelt Center	103-151 Centerway	College Park	Neighborhood Center	1938		B+	Local - mid	56,124	54,143	96%		0	Grocery - co-op; theater (closed for repair)	0	Non-National	Food	1.5	269	\$9.24
Largo Plaza	10402-10698 Campus Way S	Bowie	Power Center	1973	1998	A-	National - mid	404,132	390,472	97%	34	251,031	Target	Giant	Giant	40% big box like Petsmart and Five Below; 15% smaller retail like Dollar Tree and Payless	188.0	1,918	Withheld
Beltsville Plaza	10413-10425 Baltimore Ave	College Park	Neighborhood Center	1986		A-	Local - mid	28,697	28,697	100%		12,177	Rexel	0	0	Yia Yia's Restaurant; Arby's outparcel	7.6	110	-
Chestnut Hills	10452 Baltimore Ave	College Park	Neighborhood Center	1960	2005	C+	Local - low	81,834	79,330	97%	19	27,850	Pepco, Rite Aid	0	0	Cleaners, bakery	14.6	357	\$24.96
Eastgate Shopping Center	10501-10605 Greenbelt Rd	Cheverly-New Carrollton	Neighborhood Center	1981	2007	B	Regional - mid	109,287	83,025	76%	25	9,010	Giant	0	Giant	Beauty supplies	63.3	327	Withheld
Kettering Plaza	10644-10694 Campus Way S	Bowie	Community Center	1974		C	National - low	89,428	89,428	100%		18,719	Ross	CVS	0	40% local retail	1.8	578	-
Tantallon Shopping Center	10701-10801 Indian Head Hwy	Southwest	Neighborhood Center	1966		B+	Local - mid	93,845	93,845	100%	10	8,000	YMCA	AutoZone	0	Nearly 100% occupied; pizza, gym, cleaners, salons, tax services	21.8	432	-
Sunrise Plaza	10800-10820 Rhode Island Ave	College Park	Strip/ Convenience	1986	1999	C-	Local - low	58,301	51,025	88%	2		0	0	0	0	3.2	179	\$12.96
St. Mary's Shops	10912 Baltimore Ave	College Park	Strip/ Convenience	2014		A+	National - mid	28,186	25,531	91%			Aldi	Panera, TD bank	Aldi	0	0.0	25	Withheld
Beltsville Commerce Center	10957-11001 Baltimore Ave	College Park	Strip/ Convenience	1989		C+	Local - low	26,000	26,000	100%			0	Old Line Wine, Spirits, and Bistro	0	Three Brothers, Beauty, Atomic Music Store	2.3	100	\$23.52
Powder Mill Station Shopping Center	11101-11123 Baltimore Ave	College Park	Strip/ Convenience	1989		C	Local - low	11,527	9,001	78%	10		0	0	0	0	1.2	60	\$21.96
CVS Center	11110-11118 Baltimore Ave	College Park	Neighborhood Center	1950		C+	Local - low	22,780	22,780	100%	2	11,126	0	CVS	0	0	0.6	50	-
Next to Eastgate - possible addition	11300 Greenbelt Rd	Cheverly-New Carrollton	Strip/ Convenience	2007		B+	Local - low	22,540	18,341	81%			0	0	0	Tons of vacancy - possible addition to Eastgate Center	9.6	125	Withheld
South Potomac Commerce Center	11388-11412 Livingston Rd	Southwest	Strip/ Convenience	1972		C-	Local - low	16,100	11,049	69%			0	0	0	A couple vacancies with signs still up; tag and title, ethnic restaurants, salons, church	1.8	100	\$19.56
Maryland Farms Shopping Center	11430-11472 Cherry Hill Rd	College Park	Strip/ Convenience	1973	2001	B	Local - low	43,400	41,799	96%	9		0	0	0	Restaurants, cleaners, beauty, cash depot	1.4	160	\$24.00
Calverton Shopping Center	11601-11623 Beltsville Dr	College Park	Neighborhood Center	1967	2007	A	Regional - mid	76,960	74,382	97%	2	42,000	Giant	Caves	Giant	0	14.0	447	Withheld
	1200 Sandy Spring Rd	Laurel	Strip/ Convenience	1955		C-	Local - low	15,230	15,230	100%			0	0	0	Jazzercise and Fidos for Freedom	1.6	45	-
Mitchellville Plaza	12100-12200 Central Ave	Bowie	Neighborhood Center	1991		C+	Regional - low	156,414	152,019	97%	51	45,100	Food Lion	0	Food Lion	60% inline: UPS Store, cleaners, pharmacy, offices	30.0	767	Withheld
Fairwood Green	12420 Fairwood Pky	Bowie	Neighborhood Center	2007		A+	Regional - mid	119,084	113,844	96%	20	25,000	Safeway	Golds Gym	Safeway	Wine, casual food	28.4	645	\$26.16
Crystal Plaza	12525-12765 Laurel Bowie Rd	Laurel	Neighborhood Center	1969	1987	C-	Regional - low	281,321	276,567	98%	32	38,285	Food Lion	Rite Aid (out parcel)	Food Lion	Goodwill, liquor, fast casual, medical office	78.9	980	\$24.96



# M-NCPPC

## Exhibit IV-1

### INVENTORY OF SHOPPING CENTERS FROM RETAIL SURVEY PRINCE GEORGE'S COUNTY, MD OCTOBER 2014

Center Name	Center Address	Local Trade Area	RCLCO Center Type	Year Built	Year Renovated	Level of repair/ reinvestment	Quality of Tenants	Center RBA/ GLA	Occupied GBA	Percent Leased	Number Of Stores	Anchor GLA (SF)	RCLCO Anchor	RCLCO Junior Anchor	RCLCO Grocery Anchor	RCLCO In-line Tenants/Mix	Land Area (AC)	Number of Parking Spaces	Average Weighted Rent
Potomac Village	12740-12788 Old Fort Rd	Southwest	Neighborhood Center	1974	1988	A-	Regional - low	80,000	71,224	89%	17	7,925	Fitness Evolution	Dollar General	0	Nearly 100% occupied; martial arts, salons, cleaners, bank, clinic, restaurants	7.7	350	\$19.08
Bowie Road Shopping Center	131 Bowie Rd	Laurel	Neighborhood Center	1962	1994	C	Local - low	101,078	95,094	94%	11		Vacant	0	0	0	8.4	450	\$23.04
Town Center Shopping	13200-13360 Laurel Bowie Rd	Laurel	Neighborhood Center	1968		B-	Regional - low	88,266	79,766	90%	4	20,000	Pepboys, Super Best Market	CVS, Family Dollar	Non-National	Ethnic food, laundry	34.1	887	Withheld
Pointer Ridge Plaza	1334 Northwest Crain Hwy	Bowie	Neighborhood Center	1966		B+	National - mid	72,952	32,522	45%	2	1,450	CVS	0	0	Subway; salons; liquor store	10.2	480	Withheld
Marlo Home Center	13450-13272 Baltimore Ave	Laurel	Neighborhood Center	1988		F	Local - low	213,900	211,397	99%	2	163,672	Marlo furniture	0	0	0	12.6	425	\$21.84
Contee Station	13480-13511 Baltimore Ave	Laurel	Strip/ Convenience	1984		C	Local - low	30,000	22,707	76%			0	0	0	Furniture, restaurant	4.9	70	\$22.56
Laurel Center	13600 Laurel Bowie Rd	Laurel	Neighborhood Center	1982		B-	Regional - low	58,015	58,015	100%	4	39,000	Pepboys, Super Best Market	CVS, Family Dollar	Non-National	Ethnic food, laundry	8.4	366	-
Centre at Laurel	13600-13700 Baltimore Ave	Laurel	Community Center	2005		A	Regional - low	157,963	156,968	99%		93,242	Shoppers	PetSmart	Shoppers	0	165.2	373	Withheld
Laurel Center I	13919 Baltimore Ave	Laurel	Strip/ Convenience	1987		B+	Local - mid	65,000	48,685	75%			0	0	0	Services and convenience	5.5	234	\$6.00
La Union Mall	1401 University Blvd E	Langley Park-Hyattsville	Neighborhood Center	1988		C-	Local - low	77,000	77,000	100%	60		0	0	0	All inline type	4.8	334	-
Laurel Lakes Centre	14050-14368 Baltimore Ave	Laurel	Power Center	1985	1999	A-	National - mid	460,892	452,458	98%	29	293,077	Safeway, Best Buy, Lowes	Michaels, Staples, Ross, DSW	Safeway	Subway, hair cutters	183.2	2,767	\$35.04
Laurel Pond	14201-14217 Baltimore Ave	Laurel	Strip/ Convenience	1989	2007	B	Local - low	20,000	20,000	100%	11		0	0	0	FedEx, beauty, services	1.6	69	-
Walker Mill Square Shopping Center	1420-1488 Addison Rd	Central Inside I-495	Neighborhood Center	1991		B-	National - low	47,768	44,568	93%	27		Family Dollar	Baden Medical Services	0	10% vacant; pizza, laundry, salons, restaurants, convenience store	11.3	217	\$16.56
Duron Plaza	14261-14263 Baltimore Ave	Laurel	Strip/ Convenience	1987		B	Local - low	17,176	15,177	88%			0	0	0	0	0.9	96	\$24.00
Boulevard Shops	14601-14635 Baltimore Ave	Laurel	Strip/ Convenience	1990		B	Local - mid	50,347	37,519	75%	13		0	Verizon	0	0	7.0	228	\$25.68
Laurel Convenience Center	14631 Laurel Bowie Rd	Laurel	Strip/ Convenience	2003		A	Regional - mid	12,250	12,250	100%			0	0	0	Davita, Nail Salon	0.0	60	-
Tower Plaza	14703-14707 Baltimore Ave	Laurel	Neighborhood Center	1988		A-	Local - mid	47,085	27,083	58%	12	9,788	0	0	0	Restaurants, soft goods, beauty	5.0	200	\$30.00
Towne Centre At Laurel	14828 Baltimore Ave	Laurel	Lifestyle Center	2014		A+	National - mid	335,655	240,396	72%	100		Harris Teeter, Regal Cinemas, Burlington Coat Factory, Old Navy, Sports Authority	Party City	Harris Teeter	Mostly fast casual restaurants; hair and nail salons	197.5	1,930	Withheld
	15000-15200 Major Lansdale Blvd	Bowie	Community Center	1997		A	National - mid	139,889	139,889	100%		120,623	Regal Cinemas	Smokey Bones, TGI Fridays, Seafood	0	0	17.7	742	-
University Place Center	1500-1502 University Blvd	Langley Park-Hyattsville	Strip/ Convenience	1959	2006	C-	Local - low	30,161	30,161	100%	1		0	0	0	0	2.3	130	-
University Plaza	1501-1535 University Blvd	Langley Park-Hyattsville	Neighborhood Center	1972	2009	C-	Local - low	99,517	93,914	94%	7	10,000	Deal\$	Mattress Warehouse	0	0	13.8	530	\$25.20
Crossroads of Laurel	15101 Baltimore Ave	Laurel	Strip/ Convenience	2004		B-	Local - low	17,600	17,600	100%			0	0	0	Nails, food	1.5	0	-
Free State Shopping Center	15160-15528 Annapolis Rd	Bowie	Community Center	1970	1995	B	Regional - mid	275,674	262,938	95%	33	118,630	Giant, ross	TJ Maxx, Office Depot	Giant	Small local serving - Starbucks, financial, fast casual	128.9	1,040	Withheld
Bowie Town Center	15606 Emerald Way	Bowie	Regional/ Super Regional Mall	2001		A+	National - mid	828,688	824,545	100%		368,243	Macy's, Sears, Barnes & Noble	Off Broadway	0	60% mall-quality tenants	231.7	7,497	Withheld
The Woodlyn	15638 Livingston Rd	Southwest	Strip/ Convenience			C	Local - low	7,910	0	0%			0	0	0	15% vacant; bakery, barbers, offices			
Accokeek Village Center	15785-15797 Livingston Rd	Southwest	Neighborhood Center	1999		A-	Regional - low	60,293	60,293	100%	10	33,000	Food Lion	0	Food Lion	100% occupied; salon, Fast food, cleaners, convenience store	4.8	852	Withheld

## Exhibit IV-1

### INVENTORY OF SHOPPING CENTERS FROM RETAIL SURVEY PRINCE GEORGE'S COUNTY, MD OCTOBER 2014

Center Name	Center Address	Local Trade Area	RCLCO Center Type	Year Built	Year Renovated	Level of repair/ reinvestment	Quality of Tenants	Center RBA/ GLA	Occupied GBA	Percent Leased	Number Of Stores	Anchor GLA (SF)	RCLCO Anchor	RCLCO Junior Anchor	RCLCO Grocery Anchor	RCLCO In-line Tenants/Mix	Land Area (AC)	Number of Parking Spaces	Average Weighted Rent
Ritchie Marlboro Marketplace	1701-1791 Ritchie Marlboro Ct	Marlboro-Westphalia	Power Center			A+	National - mid	192,535	0	0%			Bjs	TJMaxx, Big Lots	Bjs	Dollar Tree, Modells, Bed Bath and Beyond			
	17-31 Hampton Park Blvd	Central Inside I-495	Strip/ Convenience	1987		C-	National - low	13,561	13,561	100%			Jiffy Lube	0	0	100% auto related sales and body shops	1.4	35	-
TikTok Liquors	1810-1820 University Blvd E	Langley Park-Hyattsville	Strip/ Convenience	1988		C	Local - low	15,966	15,966	100%	1		0	0	0	Liquor store	2.4	150	-
	1817-1823 East-west Hwy	Langley Park-Hyattsville	Strip/ Convenience	1955		C-	Local - low	14,342	14,342	100%	1	13,000	0	Rite Aid	0	Papa Johns, 2 others	0.0	90	-
Gorman Plaza	201-225 Gorman Ave	Laurel	Strip/ Convenience	1970		Defunct	Local - low	18,747	15,148	81%	8		0	0	0	Only Pasta Plus in business	0.2	40	\$35.04
2031 University Blvd	2031 University Blvd E	Langley Park-Hyattsville	Strip/ Convenience	1964		C-	Local - low	40,000	29,500	74%			0	0	0	2 restaurants/clubs	2.5	245	\$12.12
Riggs Plaza	2065 University Blvd E	Langley Park-Hyattsville	Strip/ Convenience	1951		C-	Local - low	77,237	74,735	97%	1		0	0	0	Insurance, cleaners	6.5	40	\$15.00
Keywood Shopping Center	2201-2303 Varnum St	Langley Park-Hyattsville	Strip/ Convenience	1942		C-	Local - low	47,507	40,276	85%	13		Church, Family Dollar	0	0	0	2.8	80	Withheld
Adelphi Plaza	2328-2340 University Blvd	Langley Park-Hyattsville	Neighborhood Center	1963		C-	Local - low	42,716	42,716	100%			International super market	0	Non-National	0	8.4	160	-
Hillcrest Heights Shopping Center	2346 Iverson St	Branch Avenue	Neighborhood Center	1953	2004	B-	Regional - low	83,301	83,301	100%	23	39,056	Save a Lot	Family Dollar	Sav-A-Lot	Nearly 100% occupied; fast food and casual restaurants; cleaners and laundry, hardware store, barber, jewelry, tax services, salons	9.0	700	-
	2390-2396 Iverson St	Branch Avenue	Strip/ Convenience	1956		C-	Local - low	22,314	22,314	100%		22,406	Family Furniture	0	0	40% vacant; salon	3.7	80	-
Adelphi Shopping Center	2400-2520 University Blvd E	Langley Park-Hyattsville	Neighborhood Center	1953	1997	B+	Local - low	40,086	37,809	94%	9	8,000	Mega Farmers Market	Advanced Auto Parts	Non-National	0	7.0	315	\$35.04
Chillum Shopping Center	2441 Chillum Rd	Langley Park-Hyattsville	Neighborhood Center	1965	1992	A-	Regional - low	61,403	59,585	97%	10	30,030	Shoppers	0	Shoppers	Only 3	7.0	550	\$21.96
Walters Lane Plaza	2801-2817 Walters Ln	Central Inside I-495	Strip/ Convenience	1973		C-	Local - low	11,935	10,885	91%			0	0	0	100% occupied; church, salons, laundry, record store	1.1	50	\$15.96
Watkins Park Plaza	28-50 Watkins Park Dr	Bowie	Neighborhood Center	1985		B-	National - mid	113,443	113,443	100%	29	500	LA Fitness	CVS	0	80% retail; battery store; wireless carrier; restaurants	37.4	646	-
Metropolitan Shops	2900-2970 Belcrest Center Dr	Langley Park-Hyattsville	Neighborhood Center	2008		A-	Regional - mid	160,000	153,648	96%		20,303	LA Fitness, Staples,	0	0	0	13.2	585	Withheld
Queens Chapel Town Center	2906-3118 Hamilton St	Langley Park-Hyattsville	Neighborhood Center	1944		B	Local - mid	112,743	111,187	99%	36		0	0	0	Post office, services, Aaron's, 7/11	5.8	188	\$24.00
Penn-Mar Shopping Center	2950-3436 Donnell Dr	Central Inside I-495	Community Center	1960	2004	B+	National - low	386,551	367,223	95%	63	188,809	Shoppers, Ross	Burlington, PetCo, Staples	Shoppers	50% minor retail like Party city, salons and discount fashion	50.1	3,110	Withheld
The Shops At Queens Chillum	3032-3130 Queens Chapel Rd	Langley Park-Hyattsville	Neighborhood Center	1959	2008	B-	Regional - low	81,408	73,495	90%	2	30,080	Pricerite Grocery	CVS	Non-National	Payless, restaurants	12.1	461	\$29.28
Isiah 58	3100-3140 Branch Ave	Branch Avenue	Neighborhood Center	1963		C+	Local - low	147,521	147,521	100%	3		Skating rink	Thrift store churches, pawn shop	0	0	8.5	30	-
	3171-3197 Queens Chapel Rd	Langley Park-Hyattsville	Strip/ Convenience	1948		C+	Local - mid	31,206	31,206	100%			Family Dollar	Advanced Auto Parts	0	0	1.3	59	-
Rosecroft Shopping Center	3201 Old Brinkley Rd	Branch Avenue	Neighborhood Center	1973	1986	C	Regional - low	119,010	104,729	88%	27	32,669	Jumbo Food	Family Dollar	0	Mostly occupied; fast casual restaurants, mattress store, liquor store, salon, thrift store, church	8.3	482	Withheld
Bowie Marketplace	3206-3272 Superior Ln	Bowie	Neighborhood Center	1964	1990	Defunct	National - low	243,463	176,730	73%	45		Vacant	Rite Aid	0	Restaurant	20.8	1,230	Withheld
Penn Forest Shopping Center	3300-3320 Walters Ln	Central Inside I-495	Strip/ Convenience	1967		C+	National - low	36,382	24,383	67%			Dollar General	0	0	100% occupied; salons, liquor store, laundry, Chinese	5.8	200	Withheld
Collington Plaza	3300-3560 Crain Hwy	Bowie	Neighborhood Center	1993		B+	Regional - mid	121,955	121,955	100%	20	64,885	Giant	Advance Auto Parts, 7-Eleven	Giant	60% retail; banks and hair salons	12.8	1,530	-
Marlo Plaza	3306 Marlo Lane	Central Inside I-495	Neighborhood Center			C-	Local - low	240,875	0	0%			Marlo Furniture Showroom	0	0	50% vacant; carpeting, Aflac, children's learning center			
	3329 Superior Ln	Bowie	Strip/ Convenience	1970		C	Local - mid	12,000	12,000	100%			0	0	0	Rita's, tool rental, Chinese, taco bell	1.0	40	-

## Exhibit IV-1

### INVENTORY OF SHOPPING CENTERS FROM RETAIL SURVEY PRINCE GEORGE'S COUNTY, MD OCTOBER 2014

Center Name	Center Address	Local Trade Area	RCLCO Center Type	Year Built	Year Renovated	Level of repair/ reinvestment	Quality of Tenants	Center RBA/ GLA	Occupied GBA	Percent Leased	Number Of Stores	Anchor GLA (SF)	RCLCO Anchor	RCLCO Junior Anchor	RCLCO Grocery Anchor	RCLCO In-line Tenants/Mix	Land Area (AC)	Number of Parking Spaces	Average Weighted Rent
Centre at Forestville	3393 Donnell Dr	Central Inside I-495	Regional/Super Regional Mall	1980	2004	A	National - mid	480,163	480,163	100%	78	150,580	Target, JCPenney	Sears Appliance and Mattress	0	Mostly clothes, shoes, jewelry	79.0	2,662	Withheld
Sam's Shopping Plaza	3411-3433 Branch Ave	Branch Avenue	Strip/ Convenience	1977		C	Local - low	12,000	10,030	84%			0	0	0	Salons and barber, insurance, laundry, fast casual food	3.7	40	Withheld
The Mall At Prince Georges	3500 East West Hwy	Langley Park-Hyattsville	Regional/ Super Regional Mall	1957	2004	C	National - low	928,274	894,670	96%	126	499,788	Target, Macy's, JCPenney	Old Navy, TJ Maxx, Marshalls, Ross Dress for Less	0	Mostly apparel, shoes, jewelry; some services; Fast Casual Restaurants	155.6	3,673	Withheld
Prince George's Station	3501-3521 East West Hwy	Langley Park-Hyattsville	Neighborhood Center	2004		B+	Regional - mid	36,000	36,000	100%		50,000	Giant	0	Giant	Nails, subs	10.0	300	-
	3510-3514 Old Silver Hill Rd	Branch Avenue	Strip/ Convenience	1957		C-	Local - low	10,892	10,892	100%			0	0	0	Nearly 100% occupied mini mart, seafood restaurants, tattoos, hubcap shop	0.6	20	\$18.96
The Shoppes at Metro Station	3601-3605 East West Hwy	Langley Park-Hyattsville	Neighborhood Center	1999		A-	Local - mid	32,581	32,581	100%		11,294	0	CVS	0	Cleaners, optician, beauty, Chinese	10.0	193	-
Port Towns Shopping Center	3601-3831 Bladensburg Rd	Langley Park-Hyattsville	Neighborhood Center	1987		C	Regional - low	56,000	56,000	100%	13	36,300	Shoppers	CVS	Shoppers	Hair, electronics	5.0	300	-
St. Barnabas Plaza	3650-3674 St Barnabas Rd	Branch Avenue	Strip/ Convenience	1988		C-	Local - low	14,071	14,071	100%			0	0	0	Barbers, salons, thrift store, convenience store, cleaners, fast food	1.0	80	-
St. Barnabas Square	3671 St. Barnabas Road	Branch Avenue	Strip/ Convenience			C-	Local - low	5,473	0	0%			0	0	0	Several salons, barber, pizza, event center			
	3700-3720 Old Silver Hill Rd	Branch Avenue	Strip/ Convenience	1974		C+	Local - low	24,000	22,500	94%			0	Auto Parts Depot	0	100% occupied; workforce development centers, exterminators, churches	1.5	50	\$10.44
Iverson Mall	3701-3891 Branch Ave	Branch Avenue	Regional/Super Regional Mall	1967	2002	B	National - low	620,209	608,859	98%	80	298,000	Burlington Coat Factory	0	0	Shoes, clothing, and jewelry; food court	59.0	4,180	Withheld
	3720 Old Silver Hill Rd	Branch Avenue	Strip/ Convenience	1959		C-	Local - low	13,000	3,817	29%			0	0	0	About 50% vacant; salon, barber, fast casual restaurant	0.4	40	\$18.48
The Shoppes at Bowie Town Center	3800-3900 Evergreen Pky	Bowie	Neighborhood Center	2004		B	National - mid	92,286	67,286	73%		20,000	AC Moore; Five Below	Party City	0	30% - California Tortilla; fashion stores; wireless carrier; medical clinic; sushi	35.0	250	Withheld
	3814-3824 Bladensburg Rd	Langley Park-Hyattsville	Strip/ Convenience	1947		C-	Local - low	10,324	10,324	100%			0	0	0	Mattress, thrift, tax	0.3	15	-
Marlow Heights Shopping Center	3899-4277 Branch Ave	Branch Avenue	Power Center	1957	2001	B	National - mid	762,291	746,969	98%	60	170,670	Macy's	Giant	0	Clothing, liquor stores, restaurants, salons, mini mart	41.5	2,000	\$23.16
	3900 Bexley Pl	Branch Avenue	Strip/ Convenience	1978		B-	Local - low	28,000	28,000	100%			0	0	0	churches, ballroom, restaurant	2.9	200	-
Silver Hill Station	4025 Silver Hill Rd	Branch Avenue	Strip/ Convenience	1990		C	Local - low	36,000	36,000	100%			0	0	0	Nearly 100% occupied; salons, liquor store, dentist, fast casual restaurant, cleaners, church	3.6	100	-
Bowie Town Center Strip	4101 Northview Dr	Bowie	Community Center	2001		A-	National - mid	107,005	107,005	100%		76,928	Safeway	Dollar Tree	Safeway	60% local and regional stores (Christian book, blinds)	0.0	0	\$0.00
S & R Center	4317-4325 Kenilworth Ave	Cheverly-New Carrollton	Strip/ Convenience	1987		C+	Local - low	20,000	20,000	100%			0	0	0	Nails, bars, fast casual	1.5	120	-
	4410-4418 Powder Mill Rd	College Park	Strip/ Convenience	1968		B-	Local - low	15,584	15,584	100%			0	0	0	7/11	1.1	82	-
Bowie Gateway Center	4410-4600 Mitchellville Rd	Bowie	Power Center	1995		B+	National - mid	564,067	564,067	100%	15	333,371	Target	Haverty's, Petsmart, Sports Authority, Staples, Big Lots	0	25% other big box	34.0	1,169	-
College Park Center	4513 College Ave	College Park	Strip/ Convenience	1920		A-	Local - high	18,370	18,370	100%			0	0	0	0	0.9	32	-
	4516-4534 St. Barnabas Rd	Branch Avenue	Strip/ Convenience	1959		C-	National - low	17,332	13,231	76%			0	0	0	Cricket, pizza, Dollar Rent a car	1.8	85	\$18.96
Three Brothers Center	4521-4531 Kenilworth Ave	Cheverly-New Carrollton	Strip/ Convenience	1990		B-	Local - mid	21,250	21,250	100%			0	0	0	Three brothers restaurant, Chinese, self defense	1.7	95	-

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Center Name	Center Address	Local Trade Area	RCLCO Center Type	Year Built	Year Renovated	Level of repair/ reinvestment	Quality of Tenants	Center RBA/ GLA	Occupied GBA	Percent Leased	Number Of Stores	Anchor GLA (SF)	RCLCO Anchor	RCLCO Junior Anchor	RCLCO Grocery Anchor	RCLCO In-line Tenants/Mix	Land Area (AC)	Number of Parking Spaces	Average Weighted Rent
	4620 St Barnabas Rd	Branch Avenue	Strip/ Convenience	1972		C-	Local - low	16,760	16,760	100%			0	0	0	100% occupied: Salons, church, liquor store, used furniture store, Chinese food	0.9	50	-
Suitland Shopping Center	4628-4670 Suitland Rd	Central Inside I-495	Neighborhood Center	1954		C	Local - low	140,628	119,112	85%		0	0	0	0	Pawn, salons, tax services, fast food	3.2	120	\$12.00
College Park Marketplace	4700-4738 Cherry Hill Rd	College Park	Community Center	1998		A	National - mid	238,765	235,971	99%		138,542	Home Depot, Shoppers, Best Buy	0	Shoppers	0	43.0	1,138	Withheld
Silver Hill Shopping Center	4701 Silver Hill Rd	Central Inside I-495	Strip/ Convenience	1990		C-	National - low	32,071	32,071	100%	8	11,000	Rite Aid	Church	0	0	3.0	150	-
Coral Hills Shopping Center	4801-4829 Marlboro Pike	Central Inside I-495	Neighborhood Center	1988		C-	Regional - low	79,400	79,400	100%	17	45,930	Shoppers	Family Dollar, Auto Zone	0	40% retail; salons, laundry, checks cashed, tax services, restaurants	7.0	345	Withheld
Andrews Manor Shopping Center	4803-4941 Allentown Rd	Branch Avenue	Community Center	1960	1995	B	Regional - low	118,436	71,524	60%	27	10,601	Value Village, ShopSmart	Family Dollar	0	Nearly 100% occupied; carry out and fast food, barber, pawn shop, tax services, liquor store, wireless carrier, rental center, cleaners, beauty supply	49.4	1,992	\$16.56
Jemals Bladensburg Shopping Center	4813-4907 Annapolis Rd	Cheverly-New Carrollton	Strip/ Convenience	1948	1987	C-	Local - low	33,656	28,285	84%	9		0	0	0	7/11	5.0	120	\$20.04
Duval Village Center	4825 Glenn Dale Rd	Bowie	Neighborhood Center	1998		C	Local - mid	82,702	75,077	91%	12		Vacant	0	0	Subway, local restaurant	53.1	549	Withheld
Port of Bladensburg	4850-4950 Annapolis Rd	Cheverly-New Carrollton	Neighborhood Center	1949		C	Local - low	118,072	118,072	100%	2		Americana Grocery	Village Thrift Store, AutoZone	Non-National	China City, Papa Johns, other cleaners/beauty	3.6	175	-
Suitland Road Plaza	4907-4935 Suitland Rd	Central Inside I-495	Strip/ Convenience	1972		C-	Local - low	11,711	11,711	100%			0	0	0	Convenience store, salons, food markets, barber, carry out, child care	3.0	60	-
Hollywood Plaza	4924-4938 Edgewood Rd	College Park	Strip/ Convenience	1961		C	Local - low	10,523	6,923	66%			0	0	0	0	0.7	50	\$22.80
Marlborough Village Center	5010-5098 Brown Station Rd	Marlboro-Westphalia	Neighborhood Center	1990		A	Local - mid	170,742	136,167	80%		44,035	Village Center Farmers Market	0	0	20% vacant; cleaners, salon, bail bonds	27.2	450	\$23.76
Garrett Cove Shopping Center	5019-5039 Garrett Ave	College Park	Strip/ Convenience	1987		C-	Local - low	27,926	27,926	100%	3		0	0	0	7-Eleven	6.0	108	-
	5101-5113 Baltimore Ave	Langley Park-Hyattsville	Strip/ Convenience	1947		B+	Local - mid	11,000	7,704	70%			0	0	0	0	0.1	15	Withheld
	5112-5122 Baltimore Ave	Langley Park-Hyattsville	Strip/ Convenience	1950	1990	B	Local - mid	10,605	10,605	100%			0	0	0	0	0.2	0	-
Kettering Crossing	51-97 Kettering Dr	Bowie	Strip/ Convenience	1991		C	Local - low	29,098	27,087	93%			0	0	0	100% occupied, several salons; thrift and dollar stores, local pizza restaurant	3.8	146	Withheld
	5225 Indian Head Hwy	Southwest	Strip/ Convenience			C-	Local - low	15,090	0	0%			0	0	0	40% vacant; pawn, clothing, carry out, barber			
The Shops at Bladensburg	5391-5405 Annapolis Rd	Cheverly-New Carrollton	Strip/ Convenience	1958		C	Local - low	19,200	19,200	100%			0	0	0	0	1.1	53	-
Bladen Plaza	5400-5444 Annapolis Rd	Cheverly-New Carrollton	Neighborhood Center	1953	1984	C+	Regional - low	46,147	46,147	100%	12	27,575	Save-a-Lot	Advanced Auto Parts	Sav-A-Lot	Little ceasers	4.0	210	\$15.96
Sunrise Shopping Center	5400-5486 St. Barnabas Rd	Branch Avenue	Neighborhood Center	1989	2002	C+	National - low	77,728	75,326	97%	2	8,000	Family Dollar	No Excuse Workout	0	Nearly 100% occupied, cleaners, fast casual restaurants, salons, Army recruiting, dentist, clinic, barber, paint store	7.5	315	Withheld
The Shops at District Heights	5410-5500 Silver Hill Rd	Central Inside I-495	Neighborhood Center	2009		A	Regional - mid	86,733	86,733	100%	1		Giant	0	Giant	65% fast food, barber, salon, wireless carriers, tax services	9.1	250	-
Plaza Del Alamo	5550 Kenilworth Ave	Cheverly-New Carrollton	Neighborhood Center	1954		C+	Local - low	30,000	30,000	100%			Vacant Grocery	0	0	Los alamos restaurant, convenience	4.4	160	-
	5600-5620 Kenilworth Ave	Cheverly-New Carrollton	Strip/ Convenience	1949		C-	Local - low	13,064	13,064	100%			0	0	0	Crickets, beauty, check cashing	0.8	40	-
Sargent Road Shopping Center	5601-5621 Sargent Rd	Langley Park-Hyattsville	Neighborhood Center	1963	1986	C-	Regional - low	55,582	55,582	100%	7	32,537	Save-a-Lot	CVS (out parcel)	Sav-A-Lot	0	5.0	290	-

## Exhibit IV-1

### INVENTORY OF SHOPPING CENTERS FROM RETAIL SURVEY PRINCE GEORGE'S COUNTY, MD OCTOBER 2014

Center Name	Center Address	Local Trade Area	RCLCO Center Type	Year Built	Year Renovated	Level of repair/ reinvestment	Quality of Tenants	Center RBA/ GLA	Occupied GBA	Percent Leased	Number Of Stores	Anchor GLA (SF)	RCLCO Anchor	RCLCO Junior Anchor	RCLCO Grocery Anchor	RCLCO In-line Tenants/Mix	Land Area (AC)	Number of Parking Spaces	Average Weighted Rent
Riverdale Plaza Shopping Center	5617-5731 Riverdale Rd	Cheverly-New Carrollton	Neighborhood Center	1952	1984	F	Local - low	148,947	148,947	100%	4	12,084	Firestone, Riverdale Theater, Supermarket Grande	CVS	0	Nails, value clothes, services, quarter vacant	33.6	761	-
Park Way Shopping Center	5640-5660 Annapolis Rd	Cheverly-New Carrollton	Strip/ Convenience	1969		C-	Local - low	28,186	18,186	65%			0	0	0	All - some vacant	3.1	80	\$18.96
Penn Station Shopping Center	5692-5800 Silver Hill Rd	Central Inside I-495	Community Center	1989		B+	Regional - low	239,580	210,088	88%	51	26,413	Save a Lot	Planet Fitness, Dollar Tree	0	65% salons, clinic, liquor store, restaurants,	15.4	1,110	Withheld
Mattapony Shopping Center	5700 Emerson St	Cheverly-New Carrollton	Strip/ Convenience	1965		C+	Local - low	10,437	10,437	100%			0	0	0	Landramat, carryout dining	1.0	40	-
Marlboro Crossroads	5700-5726 Crain Hwy	Marlboro-Westphalia	Neighborhood Center	1993		B	Regional - mid	67,975	66,452	98%	5	60,951	Giant	0	Giant	2 vacant store fronts, sub shop	21.1	415	\$39.96
Marlboro Square	5715-5791 Crain Hwy	Marlboro-Westphalia	Neighborhood Center	1972	1999	C-	Regional - low	92,716	85,095	92%	3	58,359	Food Lion	Advance Auto Parts, Dollar General	Food Lion	40% restaurants, shoe store, salons	15.3	496	\$21.96
Riggs Plaza	5735-5815 Eastern Ave	Langley Park-Hyattsville	Neighborhood Center	1968	1989	C	Regional - mid	120,000	117,000	98%	11	17,240	Giant	0	Giant	Dollar House Plus; nails/dental services	11.0	300	\$27.00
The Shops at Silver Hill	5801 Silver Hill Rd	Central Inside I-495	Strip/ Convenience	2000		A	Local - mid	68,148	66,547	98%		13,000	0	0	0	Nearly 100% occupied; laundry, appliance and mattress discounters, wing shop, tax services	11.4	188	\$21.00
Allentown Plaza	5808-5854 Allentown Way	Branch Avenue	Strip/ Convenience	1972		B	Local - low	26,679	26,679	100%			0	0	0	Churches, ethnic restaurants, salons, shoe repair, flooring, cleaners, laundry, framing	2.2	165	-
	5813 Allentown Way	Branch Avenue	Strip/ Convenience	1975		B+	Local - low	12,608	0	0%			0	0	0	Two churches	1.3	0	\$12.00
Silver Hill Plaza	5848-5870 Silver Hill Rd	Central Inside I-495	Neighborhood Center	1972		B-	Regional - low	132,625	132,625	100%	15	102,536	Shoppers	CVS, Advance Auto Parts	0	30% retail; rent a center, pizza, salons, wireless carrier	33.2	410	\$27.00
	5900-5924 Allentown Way	Branch Avenue	Strip/ Convenience	1974		C-	Local - low	11,803	11,803	100%			0	0	0	Nearly 100% occupied; barber, trophy store, clothing stores, church, international grocery, salon, printing store	0.8	45	-
Sheridan Station	5904 Riggs Rd	Langley Park-Hyattsville	Strip/ Convenience	1952	1987	C+	Local - low	33,899	33,899	100%	11		0	0	0	0	2.5	231	-
	5925-5933 Martin Luther King Jr Hwy	Central Inside I-495	Neighborhood Center	1960		C+	National - mid	38,572	38,572	100%			CVS	0	0	70% barber, salon, auto parts	0.0	200	-
	5944 Martin Luther King Jr. Hwy	Central Inside I-495	Neighborhood Center	1956		C	National - low	37,707	34,359	91%			Family Dollar	Save-a-Lot	0	50% pawn, salon, Chinese food	3.5	164	\$24.96
Beltway Plaza Mall	6000 Greenbelt Rd	College Park	Regional/Super Regional Mall	1961	2000	B-	National - low	900,220	827,842	92%	120	338,854	Target, Marshalls, Giant	TJ Maxx, Burlington Coat Factory, Shoppers World, Big Lots	Giant	Lots of beauty, fashion, some restaurants	115.0	5,847	\$16.32
Eastpines Shopping Center	6000-6001 66th Ave	Cheverly-New Carrollton	Neighborhood Center	1955		B+	Local - mid	21,253	17,132	81%			0	Pharmacy	0	Pizza oven, beauty supply, barber	4.6	130	\$15.00
Parkland Stop and Shop	6013 Marlboro Pike	Central Inside I-495	Strip/ Convenience	1954	1998	C+	Local - low	52,825	46,824	89%			0	0	0	Nearly 100% occupied; laundry, salon, carry out, auto parts	5.2	110	\$12.96
Rivertowne Commons	6041-6235 Oxon Hill Rd	Southwest	Community Center	1986		B+	National - low	421,199	420,651	100%	62	170,075	KMart	Staples, Ross, Safeway, CVS, Dollar Tree	0	40% restaurants, electronics, shoes	290.9	2,464	\$24.96
The Shoppes at Highbridge	6101-6143 High Bridge Rd	Bowie	Strip/ Convenience	2006		B+	Local - mid	138,001	138,001	100%		8,000	None	0	0	Food restaurants	12.9	193	-
Oxon Hill Plaza	6151-6241 Livingston Rd	Southwest	Neighborhood Center	1966	2000	B	Regional - low	142,024	140,519	99%	4	57,108	Shoppers	Advance Auto Parts, Marshalls	Shoppers	Wireless carriers, random assortment of local tenants	57.1	464	Withheld
Capital Plaza Shopping Center	6200 Annapolis Rd	Cheverly-New Carrollton	Community Center	1963	1986	C+	National - mid	326,765	309,022	95%	65	143,843	Walmart	International food mart	Non-National	0	352.1	3,979	Withheld
	6200 Coventry Way	Branch Avenue	Strip/ Convenience	1987		C	Local - low	10,753	10,753	100%			0	0	0	1 church, 3 restaurants, 1 salon	2.7	99	-
Addison Plaza	6200-6300 Central Ave	Central Inside I-495	Neighborhood Center	1986		C	Regional - mid	97,981	94,532	96%	18	55,629	Safeway	Medical Clinic, CVS	Safeway	70% retail: restaurants, checks cashed, police substation, salons	24.6	409	Withheld

## Exhibit IV-1

### INVENTORY OF SHOPPING CENTERS FROM RETAIL SURVEY PRINCE GEORGE'S COUNTY, MD OCTOBER 2014

Center Name	Center Address	Local Trade Area	RCLCO Center Type	Year Built	Year Renovated	Level of repair/ reinvestment	Quality of Tenants	Center RBA/ GLA	Occupied GBA	Percent Leased	Number Of Stores	Anchor GLA (SF)	RCLCO Anchor	RCLCO Junior Anchor	RCLCO Grocery Anchor	RCLCO In-line Tenants/Mix	Land Area (AC)	Number of Parking Spaces	Average Weighted Rent
	6202-6214 Livingston Rd	Southwest	Strip/ Convenience			C-	Local - low	19,811	0	0%			0	0	0	Barbers, salons, tobacco, wireless carrier/rental car			
	6250-6270 Kenilworth Ave	Langley Park-Hyattsville	Strip/ Convenience	1963		C-	Local - mid	30,451	30,451	100%			0	Dollar Tree, Advanced Auto Parts	0	Restaurant, post office	3.5	140	-
	6300 Kenilworth Ave	Langley Park-Hyattsville	Strip/ Convenience	1940		F	Local - low	12,032	12,032	100%			0	0	0	Pg brake service, bakery, one vacant	0.5	25	-
Coventry Plaza	6300-6420 Coventry Way	Branch Avenue	Neighborhood Center	1980	1999	B+	Regional - low	132,167	132,167	100%	21	66,008	Shoppers	0	Shoppers	Mostly occupied; Five Guys, Dollar store	11.6	765	-
	6301-6307 Allentown Rd	Branch Avenue	Strip/ Convenience	1966		C-	Local - low	24,358	24,358	100%			Village Thrift Store	0	0	Ethnic grocer/restaurant	0.8	200	-
Oxon Hill Shopping Center	6301-6371 Livingston Rd	Southwest	Neighborhood Center	1961		C-	Local - low	127,199	127,199	100%		45,000	Beauty 4U	Aldi, Save-a-Lot	Aldi	30% cleaners and salons	17.5	300	-
Lusby Building	6309-6321 Allentown Rd	Branch Avenue	Strip/ Convenience	1965		C-	National - low	16,620	16,620	100%			7-Eleven	0	0	Nearly 100% occupied up and downstairs; wireless carrier, liquor store, sub shop, salon, bail bonds	0.9	78	-
Shop-Rite Center	6327-6339 New Hampshire Ave	Langley Park-Hyattsville	Strip/ Convenience	1968		C	Local - low	42,183	42,183	100%	1		0	0	0	Liquor, pawn broker, convenience store	1.2	50	-
Old Branch Crossing	6333 Old Branch Ave	Branch Avenue	Strip/ Convenience	1982		B-	Local - mid	10,392	10,392	100%			"The Market"	0	0	Some vacancies; salons; antiques; dollar store; chicken restaurant	0.1	46	-
Great Eastern Plaza	6333-6491 Marlboro Pike	Central Inside I-495	Community Center	1958		Defunct	Local - low	250,105	245,828	98%	22	135,220	New24 Fitness	0	0	30% occupied, dentist, laundry, liquor, discount male fashion	119.5	922	Withheld
	6375-6501 Suitland Rd	Branch Avenue	Strip/ Convenience	1946		C	Local - low	25,083	25,083	100%			0	0	0	Bar without signs, Chinese food, salon, cleaners, barber	4.7	70	-
Clinton Square Shopping Center	6415-6457 Old Alexandria Ferry Rd	Branch Avenue	Strip/ Convenience	1979		C	Local - low	18,961	18,961	100%	12		0	Sports Bar	0	Nearly 100% occupied; church, hookah bar, fitness studios, salon, pizza	1.9	94	-
	6500-6524 Landover Rd	Cheverly-New Carrollton	Neighborhood Center	1966		B-	Regional - low	44,810	44,810	100%		23,000	Aldi	CVS	Aldi	Cleaners, nails, liquor	3.9	310	-
Capital Corner Shopping Center	6505 Annapolis Rd	Cheverly-New Carrollton	Strip/ Convenience	1987		C-	Local - low	44,392	38,306	86%	15	11,680	0	Dollar Tree	0	Liquor, cleaners	8.4	280	\$18.96
Green Meadows Shopping Center	6543-6585 Ager Rd	Langley Park-Hyattsville	Strip/ Convenience	1949		C-	Local - low	20,491	18,692	91%			0	0	0	0	12.5	85	Withheld
Coventry Center	6571-6597 Coventry Way	Branch Avenue	Strip/ Convenience	1987		C-	Local - low	11,500	11,500	100%			0	0	0	Restaurants, insurance, salon, real estate	1.4	35	-
	6611 Marlboro Pike	Central Inside I-495	Strip/ Convenience	1999		C-	National - low	20,000	12,000	60%			Family Dollar	AutoZone	0	Remaining space vacant	2.2	74	\$12.00
Crestview Square Shopping Center	6611-6737 Annapolis Rd	Cheverly-New Carrollton	Neighborhood Center	1971		B	Local - mid	74,680	74,680	100%	14	31,900	0	Value Village Thrift, Family	0	0	7.3	568	Withheld
	6725 Suitland Rd	Branch Avenue	Strip/ Convenience	1984		C-	Local - low	14,764	14,764	100%			0	0	0	Barbers, checks cashed, salon, tax services	1.1	52	-
Tanger Outlets	6800 Oxon Hill Rd	Southwest	Outlet	2013		A+	National - high	221,765	221,765	100%			Ralph Lauren, H&M	0	0	National retailer outlets like Coach, Nike, Michael Kors	4.9	1,850	-
Metzerott Plaza - Part of Wildecroft	6806 Riverdale Rd	Cheverly-New Carrollton	Strip/ Convenience	1971	1998	C-	National - low	18,200	18,200	100%		13,000	Rite Aid	Family Dollar	0	Approx. 25% retail: 2 laundry, Chinese food, wireless carrier, checks cashed, bank	1.8	90	-
Bowie Plaza	6806-6948 Laurel Bowie Rd	Bowie	Neighborhood Center	1966		C	Local - mid	101,242	97,243	96%	28	15,000	Fitness center in anchor space	CVS	0	Financial, food	55.2	573	Withheld
Wildecroft Shopping Center	6808-6820 Riverdale Rd	Cheverly-New Carrollton	Strip/ Convenience	1971		C-	National - low	24,540	24,540	100%		8,500	Rite Aid	Family Dollar	0	Approx. 25% retail: 2 laundry, Chinese food, wireless carrier, checks cashed, bank	2.2	95	-
The Hilltop Plaza	6830 Race Track Rd	Bowie	Community Center	1969	2011	A+	Regional - high	151,924	142,019	93%	11	50,757	Aldi, Mom's	7-Eleven, Advanced Auto	Aldi, Mom's Organic	0	79.1	1,462	Withheld
King Shopping Center	7001-7101 Martin Luther King Jr Hwy	Central Inside I-495	Neighborhood Center	1991		B-	Regional - low	93,859	89,260	95%	2	52,000	Shoppers	CVS	Shoppers	60% retail; salons, wireless carrier, clinic, tax services	16.4	425	\$21.96
Manokeek Village Center	7025 Berry Rd	Southwest	Neighborhood Center	2003		A	Regional - mid	101,664	93,063	92%		55,800	Giant	0	Giant	15% vacant; Starbucks, Chinese food, cleaners and salons	23.1	495	Withheld

## Exhibit IV-1

### INVENTORY OF SHOPPING CENTERS FROM RETAIL SURVEY PRINCE GEORGE'S COUNTY, MD OCTOBER 2014

Center Name	Center Address	Local Trade Area	RCLCO Center Type	Year Built	Year Renovated	Level of repair/ reinvestment	Quality of Tenants	Center RBA/ GLA	Occupied GBA	Percent Leased	Number Of Stores	Anchor GLA (SF)	RCLCO Anchor	RCLCO Junior Anchor	RCLCO Grocery Anchor	RCLCO In-line Tenants/Mix	Land Area (AC)	Number of Parking Spaces	Average Weighted Rent
Woodberry Square	7047-7099 Allentown Rd	Branch Avenue	Neighborhood Center	1988	2001	B-	National - low	61,126	52,269	86%		16,200	Family Dollar	AutoZone, Ocean Beauty	0	Mostly occupied: wireless carrier, fast casual restaurants, salons, barber, cleaners, liquor store,	19.1	285	\$18.96
	7050-7074 Allentown Rd	Branch Avenue	Neighborhood Center	1971		C+	Regional - mid	83,291	83,291	100%		58,000	Giant	CVS	Giant	Salons, fast casual restaurants, real estate office, beauty supply, cleaners, liquor store	11.3	508	-
College Park Shopping Center	7236-7370 Baltimore Ave	College Park	Neighborhood Center	1949	1990	A-	National - mid	186,881	174,379	93%	2	34,083	0	CVS, Rugged Warehouse, FedEx	0	Starbucks, Noodles & Co	10.5	608	Withheld
Kent Village Center	7309-7341 Landover Rd	Cheverly-New Carrollton	Strip/ Convenience	1959	1987	C-	National - low	41,000	28,499	70%	17	8,000	Family Dollar	0	0	80% restaurant, barber, wireless carrier	7.0	218	\$18.12
	7313 Baltimore Ave	College Park	Strip/ Convenience	2005		A	Local - mid	13,600	11,210	82%			0	0	0	Restaurants	0.4	30	\$34.56
Laurel Park Shopping Center	7401-7427 Van Dusen Rd	Laurel	Strip/ Convenience	1988		B	Local - mid	23,966	21,167	88%	11		0	0	0	0	11.2	115	\$14.04
	7408 Livingston Rd	Southwest	Strip/ Convenience			C-	Local - low	11,100	0	0%			0	0	0	60% vacant, liquor and pizza, barber upstairs			
Greenway Center	7409-7595 Greenbelt Rd	Cheverly-New Carrollton	Community Center	1980	2008	A	Regional - mid	284,292	279,999	98%	37	127,557	Safeway	PetSmart, Dollar Tree, Modell's, CVS	Safeway	Some national	34.7	2,599	\$27.00
Community Shop N Go	7423-7467 Annapolis Rd	Cheverly-New Carrollton	Neighborhood Center	1955		C	Local - low	41,954	39,793	95%		9,869	0	CVS, Bank	0	Cash Depot, Dollar Plus, Hair/Nails	1.6	140	\$24.96
	7450 Annapolis Rd	Cheverly-New Carrollton	Strip/ Convenience	1965		C	Local - low	11,000	11,000	100%			0	0	0	Vet, cleaners, nails	0.7	28	-
Glenridge Center	7500-7558 Annapolis Rd	Cheverly-New Carrollton	Neighborhood Center	1961	1993	C+	Regional - mid	125,694	121,936	97%	13	69,255	Giant	Dress Barn	Giant	0	10.5	600	Withheld
	7501-7539 Landover Rd	Cheverly-New Carrollton	Strip/ Convenience	1951		F	Local - low	27,211	26,112	96%			Ace Food Mart	0	Non-National	80% pawn, wireless store, hair salon	3.7	110	\$26.16
Osborne Shopping Center	7571-7620 Crain Hwy	Marlboro-Westphalia	Neighborhood Center	1971		A+	Regional - mid	69,230	66,980	97%		35,754	0	0	0	0	23.4	650	Withheld
Dodge Plaza	7700-7778 Landover Rd	Cheverly-New Carrollton	Neighborhood Center	1965	1998	C-	Local - low	111,284	108,279	97%	21	50,242	Landover Food	0	Non-National	20% vacant; 50% beauty, cleaners, liquor	12.0	800	\$21.96
Palmer Park Village Center	7701-7727 Barlowe Rd	Central Inside I-495	Strip/ Convenience			A-	Local - low	25,595	25,595	100%			0	0	0	80% occupied: boxing gym, liquor store, church	0.2	110	-
Forestville Plaza Shopping Center	7702-7794 Marlboro Pike	Central Inside I-495	Community Center	1973		C	Regional - low	303,881	270,241	89%	11		Rose's	Save-a-Lot	0	40% vacant; mattress discounter store, barber	36.5	1,440	Withheld
The Shoppes At New Carrollton	7710-8492 Riverdale Rd	Cheverly-New Carrollton	Power Center	1960	2001	A-	National - mid	309,061	303,065	98%	15	202,962	Lowes, Shoppers	K&C	Shoppers	Fast food	60.2	1,180	Withheld
Forest Square	7801-7821 Parston Dr	Central Inside I-495	Strip/ Convenience	1972		C-	Local - low	16,587	13,094	79%			0	0	0	80% occupied; pizza, deli, wireless carrier, church, salons	1.4	100	\$19.56
	7810-7860 Central Ave	Central Inside I-495	Strip/ Convenience	1988		B	Local - low	20,465	16,478	81%	8		Price Busters Furniture and Mattress	0	0	80% occupied; County WIC Office, Christian bookstore, salons	18.0	120	\$20.04
Langley Park Shopping Center	7900-8050 New Hampshire Ave	Langley Park-Hyattsville	Strip/ Convenience	1940	2001	C	Local - low	162,255	135,726	84%	27	17,066	Rite Aid	Gallo Clothing	0	0	14.1	392	Withheld
Park Central	7901-7963 Central Ave	Central Inside I-495	Strip/ Convenience	1990		A-	Local - low	47,640	47,640	100%	12		Conference Center	DeWalt fixtures	0	70% retail; cash advances, rental cars, barber, consignment	6.2	210	-
Langley Park Plaza	7901-8011 New Hampshire Ave	Langley Park-Hyattsville	Community Center	1977		C+	Local - mid	127,723	122,142	96%		8,000	Atlantic supermarket International Foods	Regency Furniture, CVS	Non-National	0	25.1	1,070	\$24.96
Clinton Station	7918-7930 Old Branch Ave	Branch Avenue	Strip/ Convenience	1940		C	Local - low	11,816	11,816	100%			0	0	0	Nearly half vacant; real estate office, church - related uses, tattoos, salons, restaurants, fitness studio	2.2	29	-
Defence Shopping Center	7933-7963 Annapolis Rd	Cheverly-New Carrollton	Neighborhood Center	1961		B-	National - low	74,206	62,103	84%	11		Staples	0	0	0	7.3	0	\$16.56



## Exhibit IV-1

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Center Name	Center Address	Local Trade Area	RCLCO Center Type	Year Built	Year Renovated	Level of repair/ reinvestment	Quality of Tenants	Center RBA/ GLA	Occupied GBA	Percent Leased	Number Of Stores	Anchor GLA (SF)	RCLCO Anchor	RCLCO Junior Anchor	RCLCO Grocery Anchor	RCLCO In-line Tenants/Mix	Land Area (AC)	Number of Parking Spaces	Average Weighted Rent
	8000 Martin Luther King Jr Hwy	Cheverly-New Carrollton	Strip/ Convenience	1990		C-	Local - low	11,560	11,560	100%			0	0	0	100% occupied, salon/barber, laundry, church	1.3	81	-
<b>Boulevard At The Capital Centre</b>	801-1100 Capital Centre Blvd	Bowie	Lifestyle Center	2002		A	National - mid	497,767	478,055	96%		118,000	HH Gregg, Shoppers World	Gold's Gym	Shoppers	Fashion retail; restaurants	1044.0	1,375	Withheld
<b>805 Washington Blvd</b>	805 Washington Blvd	Laurel	Strip/ Convenience	2008		A	Local - mid	11,400	11,400	100%			0	0	0	Armed Forces, Kids Play Center	0.9	55	-
<b>Campus Village</b>	8145 Baltimore Ave	College Park	Strip/ Convenience	1972		B+	Local - mid	25,261	23,601	93%	17		0	0	0	0	3.8	204	Withheld
<b>Plaza 30</b>	8301-8445 Annapolis Rd	Cheverly-New Carrollton	Neighborhood Center	1962	1998	C-	Local - low	274,320	271,330	99%	16	54,647	Value City Furniture, Save-a-Lot	Advanced Auto, Forman Mills Clothing Warehouse	Sav-A-Lot	0	38.1	550	\$18.00
<b>Old Branch Center</b>	8312-8322 Old Branch Ave	Branch Avenue	Strip/ Convenience			C	Local - low	7,372	0	0%			0	0	0	Seems 100% occupied; pizza, ethnic restaurants, wireless carrier, salons			
<b>Mini Plaza</b>	85 Yost Pl	Central Inside I-495	Neighborhood Center	1988		C-	Local - low	51,069	51,069	100%			0	0	0	100% local retail; salons, barber, laundry, clinic, pizza, liquor store	3.2	105	-
<b>Landover Crossing</b>	8511-8585 Landover Rd	Central Inside I-495	Neighborhood Center	1971	1990	B-	National - low	177,140	77,694	44%	10		Planet Fitness	0	0	40% retail salons and restaurants	39.6	800	Withheld
<b>Cherry Lane Business Park</b>	8730 Cherry Ln	Laurel	Strip/ Convenience	1991		B-	Local - mid	21,835	17,003	78%			0	0	0	0	1.0	76	\$12.00
<b>Woodyard Crossing Shopping Center</b>	8745-8853 Woodyard Rd	Branch Avenue	Power Center	1982		A	National - mid	484,542	476,305	98%		215,414	WalMart	Safeway, Petco, Lowes	Safeway	Electronic stores, mattress stores, restaurants, salons	745.1	2,330	\$24.00
<b>Kingdom Square</b>	8800-9195 Central Ave	Central Inside I-495	Community Center	1970	1989	B-	Regional - low	384,790	359,278	93%	24	107,406	The Sanctuary	Fitness4Less, Family Dollar	0	40% retail; cleaners, salons, insurance, wireless carriers, liquor store	109.5	2,344	Withheld
<b>Lanham Crossing Shopping Center</b>	8807-8845 Annapolis Rd	Bowie	Neighborhood Center	1965	2012	B	Local - mid	67,397	64,998	96%	18		0	0	0	Fitness, salons, uniforms, international market	25.4	70	Withheld
<b>Cipriano Square Plaza</b>	8819-8865 Greenbelt Rd	Cheverly-New Carrollton	Neighborhood Center	1982		B+	National - low	246,694	242,747	98%	23	0	Kmart	0	0	Beauty, fast food	27.6	833	\$21.96
<b>Clinton Plaza</b>	8827-8909 Woodyard Rd	Branch Avenue	Community Center	1980		B+	National - low	272,392	217,832	80%	26	202,432	Kmart	Gmart, ToysRUs	0	Appliance and Mattress stores	143.0	1,449	\$25.68
<b>Clinton Village</b>	8923-8985 Woodyard Rd	Branch Avenue	Strip/ Convenience	1979	1991	C	Local - mid	51,028	43,930	86%	21	8,000	0	Auto Zone	0	Independent pharmacy, fast restaurants, vacuum servicing, wig store, cleaners, wireless carrier, financial services, barber and salon	8.5	252	\$20.16
<b>Clinton Center</b>	8960-8990 Stuart Ln	Branch Avenue	Strip/ Convenience			B+	Local - low	37,642	0	0%			0	0	0	Church, barber, salon, dentist, restaurant			
<b>Woodmore Towne Centre</b>	9001 McHugh Dr	Bowie	Lifestyle Center	2010		A+	National - mid	598,573	598,573	100%		458,101	Wegmans and JCPenney	Old Navy	Wegmans	Mall retail; restaurants	268.8	1,190	Withheld
<b>Clinton Garden</b>	9001 Woody Ter	Branch Avenue	Neighborhood Center	2008		A	National - mid	38,222	38,222	100%			Office Depot	Walgreens	0	0	6.4	185	-
<b>9005-9039 Lanham Severn</b>	9005-9039 Lanham Severn Rd	Cheverly-New Carrollton	Strip/ Convenience	1945		C-	Local - low	36,438	36,438	100%			0	0	0	Food; services	1.6	35	-
<b>Metzerott Plaza</b>	9115-9127 Riggs Rd	Langley Park-Hyattsville	Neighborhood Center	1967		C-	Local - low	57,369	57,369	100%		23,321	Bestway Market	Rite Aid	Non-National	Golden Bull Restaurant, other general local	3.6	270	-
	9121 Piscataway Rd	Branch Avenue	Strip/ Convenience	1991		C+	Local - low	21,957	18,400	84%			0	0	0	Church-related uses and after school program	2.5	60	\$17.40
<b>Fort Foote Center</b>	9201-9231 Oxon Hill Rd	Southwest	Strip/ Convenience	1981		C+	National - low	25,000	25,000	100%			0	7-Eleven	0	75% ethnic restaurants, cleaners, salons, and liquor	2.9	122	-
<b>Enterprise Plaza</b>	9321-9463 Annapolis Rd	Bowie	Community Center	1965	1991	C+	National - low	202,060	202,060	100%	5	66,203	Aldi, TJ Maxx	Aaron's, Family Dollar	Aldi	Clothes, hard goods, advanced auto, 40%	64.2	860	-
<b>Laurel Shopping Center</b>	933 Washington Blvd	Laurel	Power Center	1956	1994	B+	Regional - mid	399,412	354,318	89%	70	158,347	Giant	CVS, LA Fitness	Giant	Hobby goods, soft goods/fashion	317.2	4,410	Withheld
<b>Seabrook Station Shopping Center, North</b>	9400-9560 Lanham Severn Rd	Cheverly-New Carrollton	Neighborhood Center	1960	1991	B	Local - low	127,716	127,716	100%	29	19,513	0	Autozone	0	Food, services, 90%	3.0	158	-



## Exhibit IV-1





### INVENTORY OF SHOPPING CENTERS FROM RETAIL SURVEY PRINCE GEORGE'S COUNTY, MD OCTOBER 2014

Center Name	Center Address	Local Trade Area	RCLCO Center Type	Year Built	Year Renovated	Level of repair/ reinvestment	Quality of Tenants	Center RBA/ GLA	Occupied GBA	Percent Leased	Number Of Stores	Anchor GLA (SF)	RCLCO Anchor	RCLCO Junior Anchor	RCLCO Grocery Anchor	RCLCO In-line Tenants/Mix	Land Area (AC)	Number of Parking Spaces	Average Weighted Rent
Largo Towne Center	950 Largo Center Dr	Bowie	Community Center	1991		B-	Regional - low	262,058	257,236	98%	38	168,739	Shoppers; Regency Furniture	Marshalls, Dollar Tree, Advance Auto Parts	Shoppers	60% retail: fashion; wireless carrier; restaurants	40.5	1,609	Withheld
South Potomac Professional Center	9500 Livingston Rd	Southwest	Strip/ Convenience			B-	Local - low	14,000	0	0%			0	0	0	100% tax services, hair salon, dentist			
Marlton Plaza	9500-9556 Crain Hwy	Southeast	Community Center	1979	1991	B+	Regional - low	77,012	77,012	100%	13	48,308	Food Lion	Rite Aid	Food Lion	Nearly 100% occupied: laundry, carry out, laundry, liquor store	10.0	335	\$24.00
Hunters Mill Center	9501-9503 Livingston Rd	Southwest	Strip/ Convenience	1986		C-	Local - low	11,440	11,440	100%			0	0	0	Nearly 100% occupied, tattoo parlor, cleaners, Thai restaurant, pizza, salons	1.4	50	-
Livingston Square	9510-9580 Livingston Rd	Southwest	Neighborhood Center	1976	1992	B	Regional - mid	107,337	85,204	79%	24	39,705	Giant	0	Giant	50% medical, cleaners and salons	11.0	525	Withheld
Laurel Plaza	9606-9644 Fort Meade Rd	Laurel	Neighborhood Center	1966		C	Local - low	164,429	164,429	100%		32,000	Planet Fitness, 2nd Ave Value Stores	Dollar Tree	0	Ethnic food	14.9	989	-
Steward Village	9701-9711 Fort Meade Rd	Laurel	Strip/ Convenience	1973		Defunct	Local - low	44,226	29,707	67%		31,143	Dutch County Farmers Market	0	0	0	4.1	170	\$20.52
Hollywood Shopping Center	9801-9827 Rhode Island Ave	College Park	Neighborhood Center	1975	1999	B	National - mid	47,000	47,000	100%	12	27,585	REI	Mom's Organic	0	0	9.0	200	-
Pheasant Run Center	9830-9860 Mallard Dr	Laurel	Strip/ Convenience	1988		B-	Local - low	19,504	19,504	100%	2		0	0	0	New Life Christian Center, China Diner	7.1	95	-
Aerospace Place Retail Center	9900 Greenbelt Rd	Laurel	Strip/ Convenience	2001		C	Local - low	24,332	24,332	100%			0	7-Eleven	0	Laundry, fast food, salon, liquor	2.3	119	-
Landover Hills Shopping Center	Annapolis Rd @ 71st Ave	Cheverly-New Carrollton	Strip/ Convenience	1951	2009	B-	Local - low	16,677	15,631	94%			0	Sleepy's Food Mart	0	0	4.4	80	\$30.00
The Shoppes at Arts District	Baltimore Ave	Langley Park-Hyattsville	Neighborhood Center	2011		A+	Regional - high	35,564	35,564	100%			0	Mom's Organic	Mom's Orananic	0	1.8	110	-
Hall Station	Rt 301 @ Central Avenue	Bowie	Strip/ Convenience	2014		A	Local - mid	12,724	4,363	34%			Community Credit Union	South Bowie Library	0	Dunkin Donuts	30.6	100	Withheld
Brandywine Crossing	US Route 301/ MD Route 5 @ Chadds Ford Dr	Southeast	Power Center	2008		A+	National - mid	578,792	569,705	98%		357,571	Target, Safeway	Marshalls, Jo Ann Fabrics, Xscape Theatres	Safeway	Appears to still be in lease up, but approximately 80% occupied; numerous casual restaurants, a couple of fast casual restaurants, AAA center, video game store, UPS Store, wireless carrier	165.0	1,890	Withheld

SOURCE: RCLCO; CoStar






## Exhibit IV-2

### SURVEY OF MAIN STREET RETAIL AND MIXED-USE RETAIL PRINCE GEORGE'S COUNTY, MD OCTOBER 2014

Main Street	# of Store-fronts	RBA	Availability Rate	Tenants	Quality of Repair and Design	Street Design and Aesthetics	Image
<b>Laurel Main Street</b> Main Street between Washington Blvd & Riverview Ct	40	205,910	18.50%	A few local, main street appropriate tenants; some tenants that could fit better elsewhere, such as autoparts; several gift shops and arts shops	Historic buildings in overall good repair, some buildings needing additional maintenance and to be restored to historic facades	Wide, brick sidewalks in good repair with street lamps and sidewalk landscaping. Few crosswalks, no bike lanes; few bike racks, benches, outdoor seating.	
<b>Old Town Bowie</b> Chestnut and Lanham Severn Chapel Ave. and 9th St.	11	32,335	25.00%	Mostly antiques, 5-6 shops, a restaurant, and a post office. Main Street retail is on both sides of the railroad tracks, centered around historic railroad community	Shops are in good and historic repair; monotonous tenants limit capturing destination antique shoppers for lunch, soft goods, etc.	Split nature of the shops limits walkability and design; little street furniture or cohesion as a "district"; historic nature and antique shop cluster has potential for building out future main street	
<b>Hyattsville Main Street</b> Baltimore Ave. between Farragut and Hamilton	14	68,901	10.70%	Storefronts are about half-filled, and going through transition. Anchored at one end by Franklins Restaurant and Brewery and at other by a new bicycle shop; a couple of cafes; these tenants and current vacant spaces (as well as Arts District just North) provide a potential catalyst for future interesting and local tenants	Mix of states of repair - some buildings look well-maintained with historic nature, others (generally the vacant) need additional work	Street design has nice lampposts, parallel parking, and bike racks; sidewalks are narrow and landscaping would be beneficial; no benches or outdoor gathering space.	
<b>Downtown College Park</b> Baltimore Ave. between Hartwick and Knox	20	103,255	0%	College-serving fast casual restaurants, pubs, and bars, anchored on one end by a neighborhood shopping center; a few services, book stores/comic book stores; for neighboring anchor institution, quality of retail could potentially be improved in terms of soft goods.	Blend of new buildings and well-maintained older buildings; several buildings could use façade repairs and signage improvements, but overall the street has a distinct college character	Sidewalks are brick and very wide, with mature trees, street lamps, district signage, benches and outdoor gathering places; Very wide street with few crosswalks, median with fence to prevent jay-walking; no bike lane, though there are bike racks	





## Exhibit IV-2

### SURVEY OF MAIN STREET RETAIL AND MIXED-USE RETAIL PRINCE GEORGE'S COUNTY, MD OCTOBER 2014

Main Street	# of Store-fronts	RBA	Availability Rate	Tenants	Quality of Repair and Design	Street Design and Aesthetics	Image
<b>Riverdale Main Street</b> Queensbury Rd at Rhode Island and Lafayette	8	57,736	28%	Decently sized Town Center Market; other buildings are for lease with seemingly no tenants besides a hair studio	Recently restored buildings, fronting Marc station; Some buildings (south side of Queensbury) could use additional repair	Location at Marc Station provides potential for commuter retail; good sidewalks, landscaping, entrance to Marc, limited parking in front, streetlamps, and benches and green space. Limited access by bike	
<b>Mount Rainier Main Street</b> Rhode Island Ave between Eastern Ave. and 34th St.	8	48,778	4.10%	Anchored on north end by new residential units on top of a nice café; Other retail is not up to par - Police precinct; liquor store; convenience and service stores; about half is vacant	Buildings are in need of repair and character; roll bars on windows and entrances of some storefronts; signage is minimal; some storefronts do have interesting and unique character	Wide sidewalks in need of minimal repairs; parallel parking in front; no street lamps, minimal street furniture or gathering space; street trees in need of maintenance	
<b>Upper Marlboro Main Street</b> Main Street between Service Ln. and Owen Bowie	19	80,664	1.50%	City and County buildings provide good anchors, though also bring tenants such as bail bonds and court lawyers; a few restaurants and gift shops; quality of tenants could be higher considering anchor institutions	Some buildings are in good repair; many need additional work, particularly façade work on second stories; signage does not match main street	Street is in good shape with brick sidewalks well maintained; gathering places with good quality street furniture at government buildings with plazas; street parking; no street lamps, bike racks, or bike lanes; landscaping on properties is good, lacking street landscaping	
<b>Clinton Main Street</b> Old Branch between Woodyard Rd. and Clinton St.	8	69,037	0%	Service-oriented barber shop, cleaners, salons; Bar and Grill; 2 vacancies	In great need of repair and reinvestment; very little character; poor quality signage and facades	Oriented more as a shopping center than main street; parking lot in front, no landscaping, street furniture, or green space	
<b>Suitland Main Street</b> Suitland between Homer Ave and Silver Hill Rd	14	166,248	13.90%	Restaurants, services, liquor, barber shop; 3-4 storefronts vacant	Roll bars on all windows and doors; need signage improvements; building needs sprucing up, but not highly overall disrepair	Nice, wide sidewalks with a few parking spaces; landscaping is present but could use improvement; no street furniture expect two street lamps	

## Exhibit IV-2

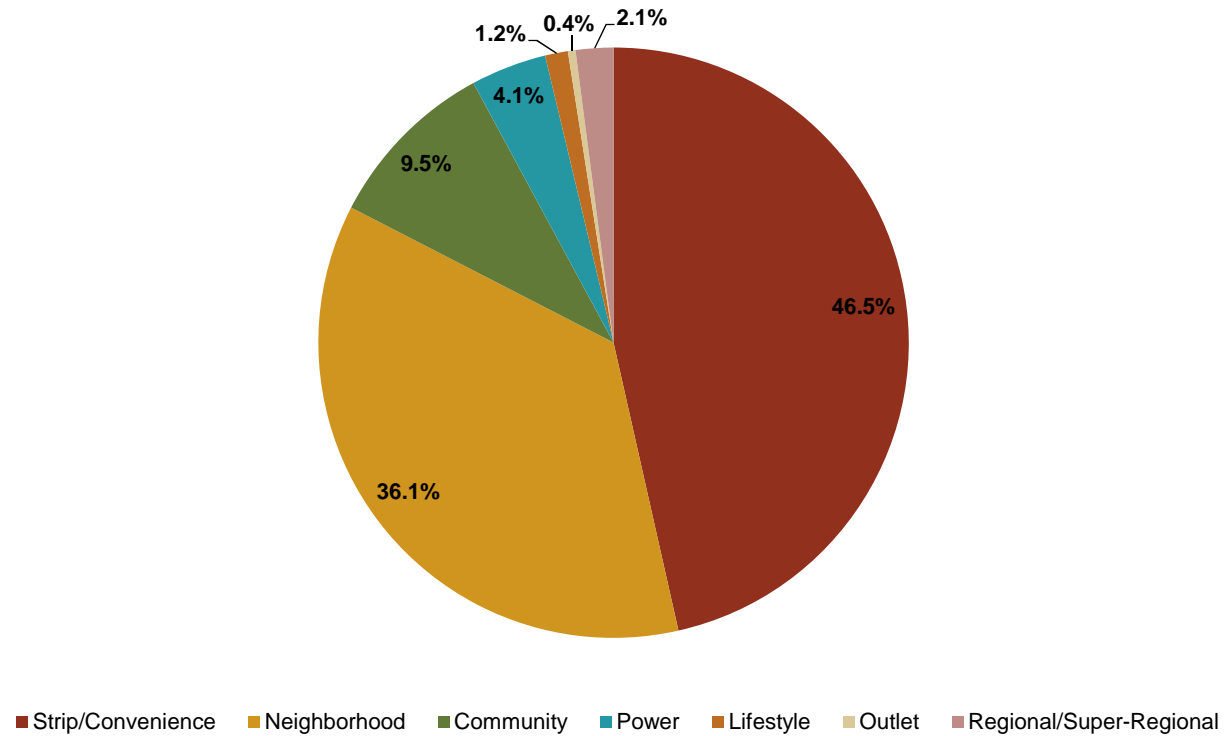
### SURVEY OF MAIN STREET RETAIL AND MIXED-USE RETAIL PRINCE GEORGE'S COUNTY, MD OCTOBER 2014

Main Street	# of Store-fronts	RBA	Availability Rate	Tenants	Quality of Repair and Design	Street Design and Aesthetics	Image
<b>District Heights Main Street</b> Marlboro Pike between Aztec and Scott Key	28	46,129	11.40%	Services, fashion, hair and beauty supply stores; some carry-out restaurants	All stores have roll bars; significant amount of trash; lacks the feel and branding of a main street	No landscaping or street furniture; parking out front; little bicycle or pedestrian access	
<b>Mixed-Use Retail</b>							
<b>National Harbor</b> Traditional Neighborhood Development	N/A	250,000	3.70%	While not a traditional or historic main street, National Harbor does not readily fit into a standard shopping center type. Tenants are oriented towards tourists, with many restaurants, gift stores, and tenants similar to Build-A-Bear - not necessarily attracting county residents for destination shopping, yet providing enough retail and services for on-site or nearby residents. National Harbor serves as a specific kind of "destination retail" as a lively and exciting outing for tourists or residents, but likely lacking a regional draw with consistent customers spending a significant amount of money on retail goods.	Retail is situated in a mixed-use setting, with hotels, residential, or office uses above retail bays. Construction is new and well maintained with standard facades that are clean and modern looking	Streets and sidewalks are well maintained, with plenty of room for pedestrians and plenty of crosswalks and traffic calming measures. The landscaping is plentiful and well-cared for. A plaza area is in the center with kiosks of temporary retail, street furniture, and shade. The harbor area allows for another unique gathering place with sufficient benches, landscaping, and green space. The uniqueness of the new ferris wheel provides an interesting backdrop to the scene of the harbor and a view from the waterfront restaurants. National Harbor is well set-up to continue pursuing quality retail tenants and draw shoppers from regional locations, depending on how its retail program progresses, particularly with the addition of the outlet mall recently and the future MGM Casino.	  

SOURCE: CoStar; RCLCO

*Exhibit IV-3*

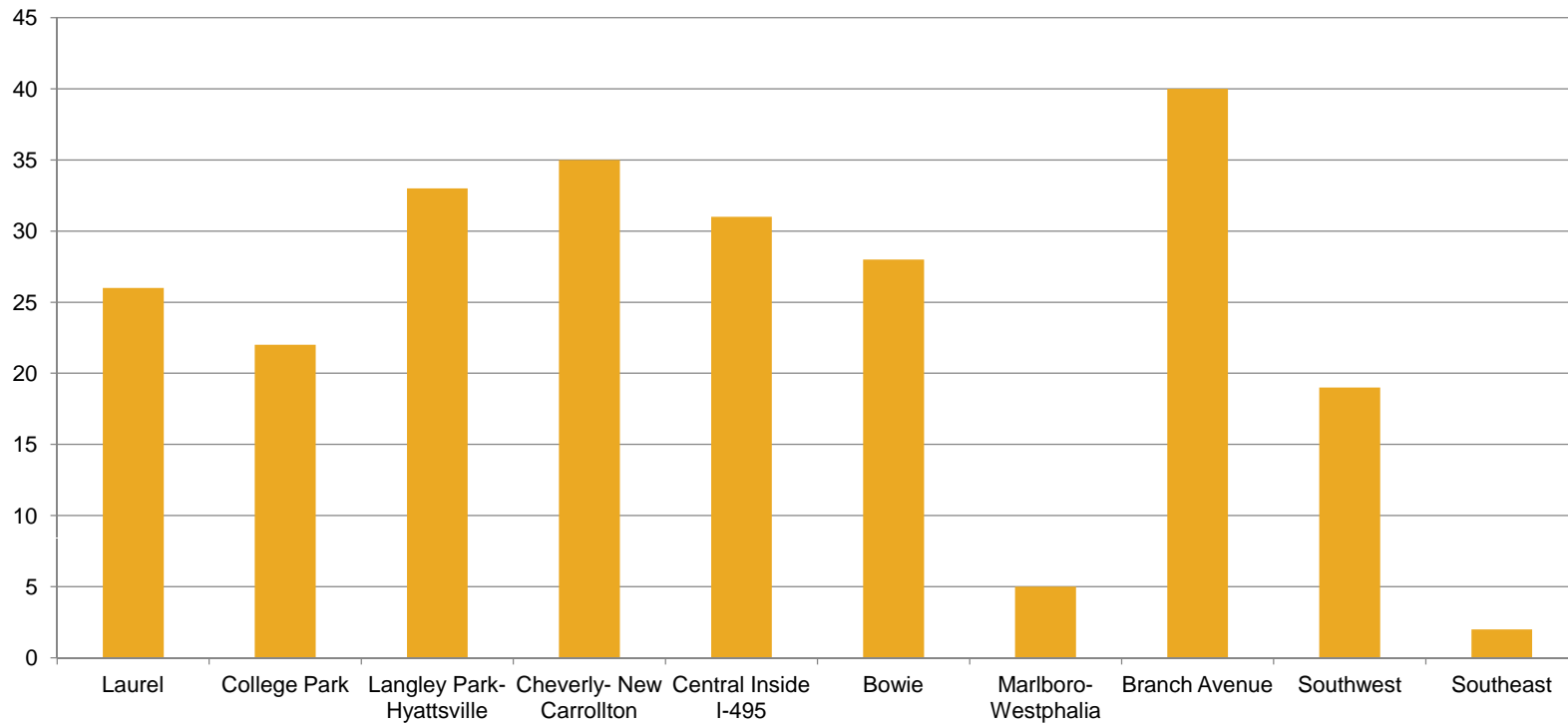
**CATEGORIES OF SHOPPING CENTERS  
PRINCE GEORGE'S COUNTY, MD  
OCTOBER 2014**



SOURCE: CoStar; RCLCO

*Exhibit IV-4*

**NUMBER OF SHOPPING CENTERS BY LOCAL TRADE AREA  
PRINCE GEORGE'S COUNTY, MD  
OCTOBER 2014**

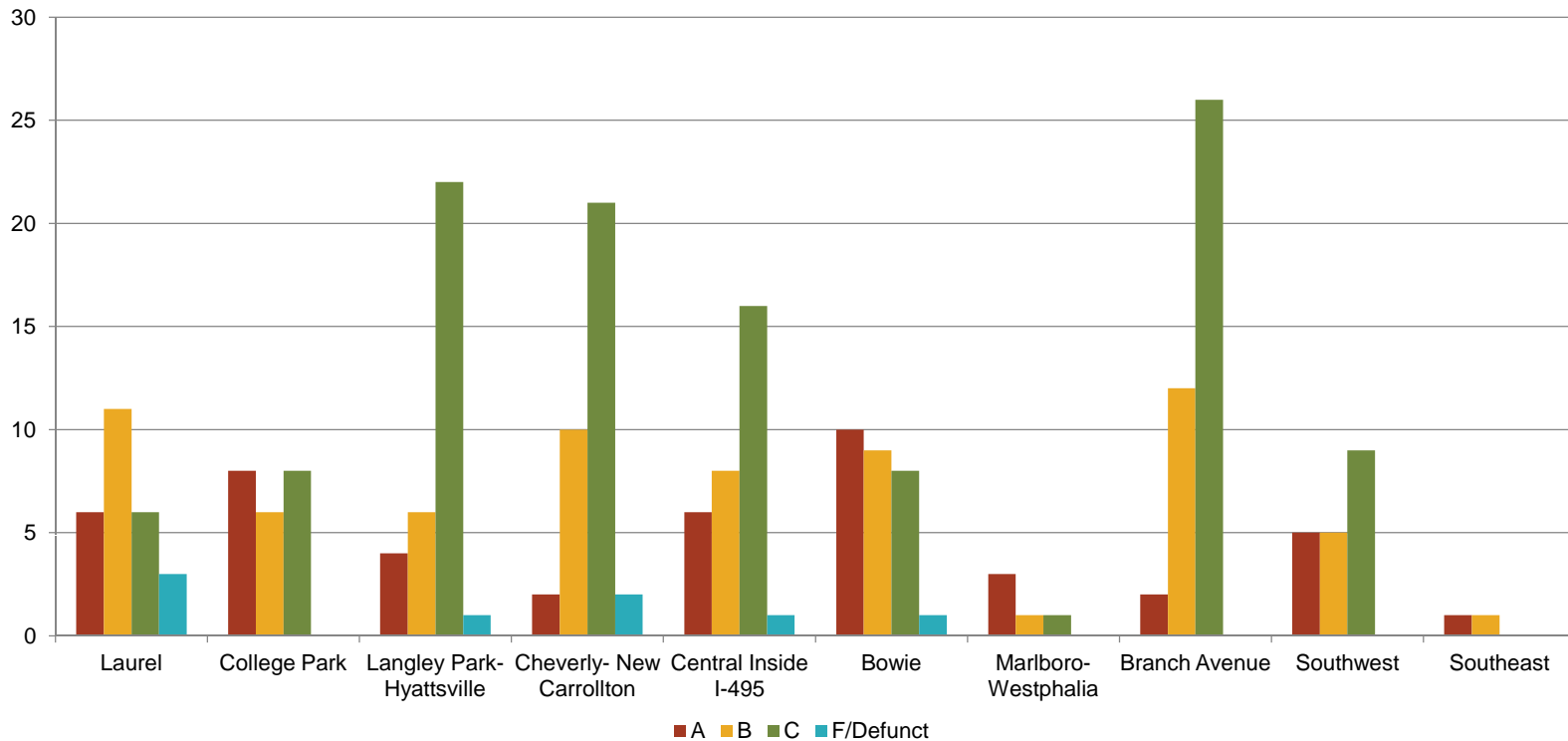


SOURCE: CoStar; RCLCO

# M-NCPPC

Exhibit IV-5

QUALITY OF SHOPPING CENTERS BY LOCAL TRADE AREA  
PRINCE GEORGE'S COUNTY, MD  
OCTOBER 2014

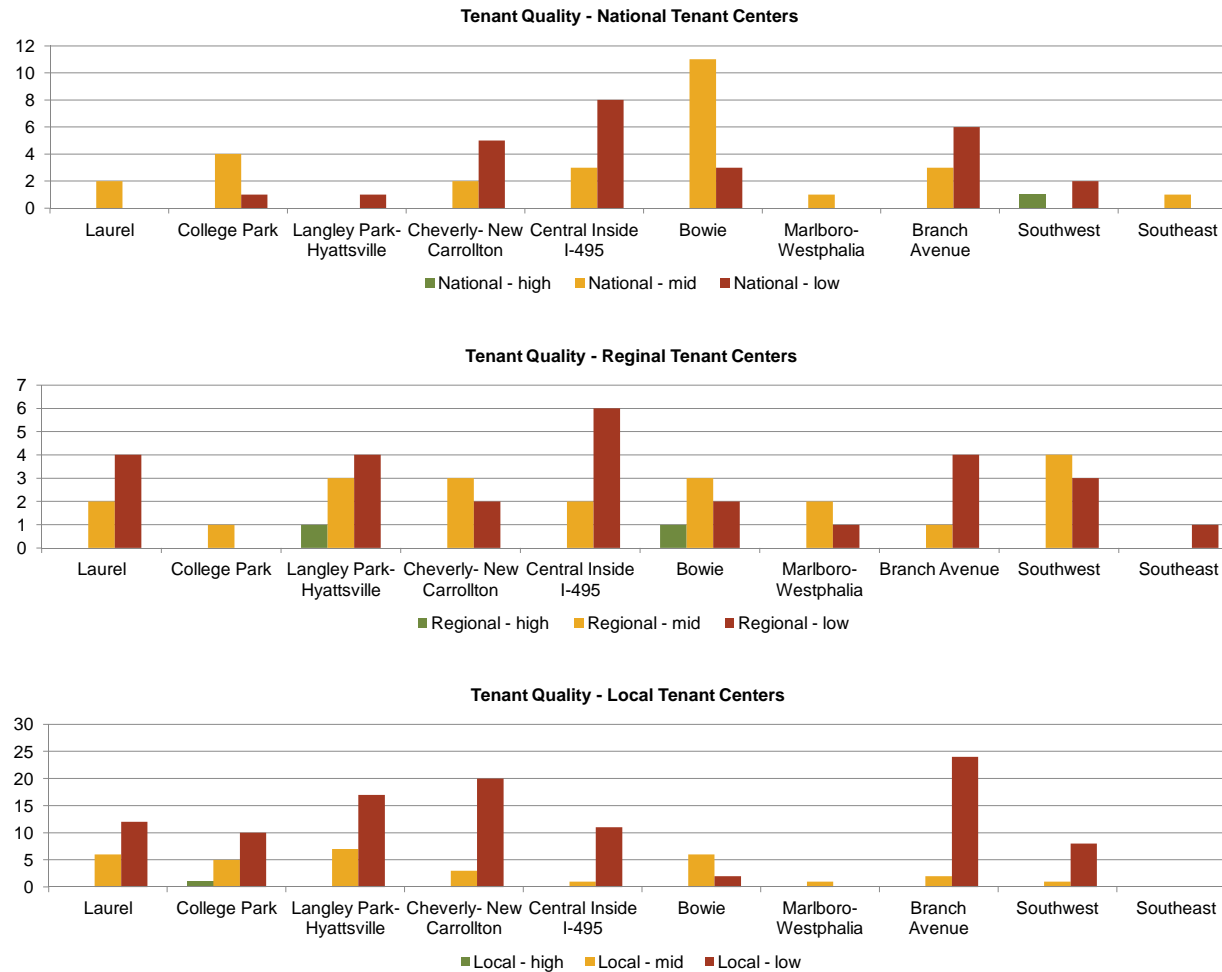


SOURCE: CoStar; RCLCO

# M-NCPPC

Exhibit IV-6

## QUALITY OF TENANTS BY TRADE AREA PRINCE GEORGE'S COUNTY, MD OCTOBER 2014



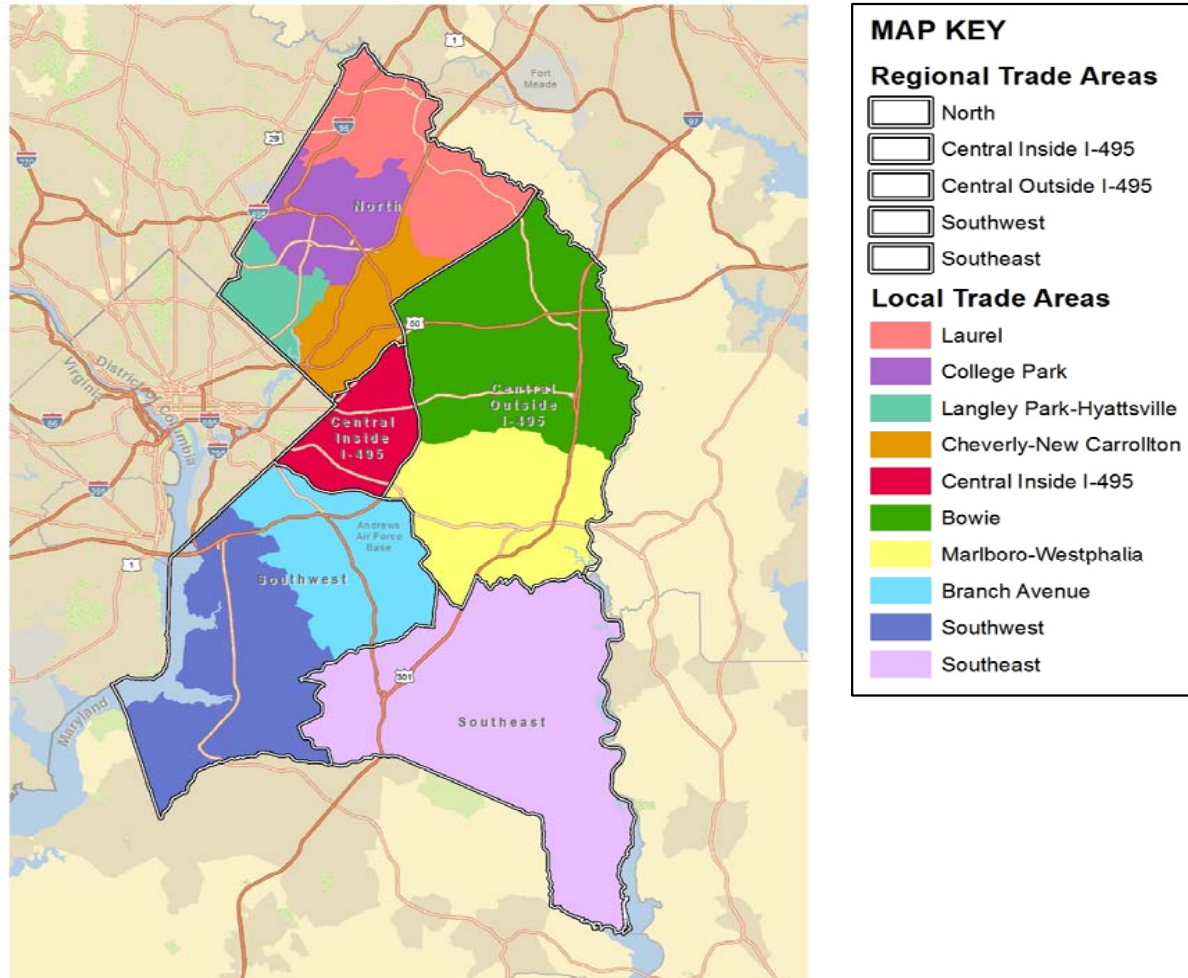
SOURCE: CoStar; RCLCO



## **V. PRINCE GEORGE'S COUNTY RETAIL MAPS**

## Exhibit V-1

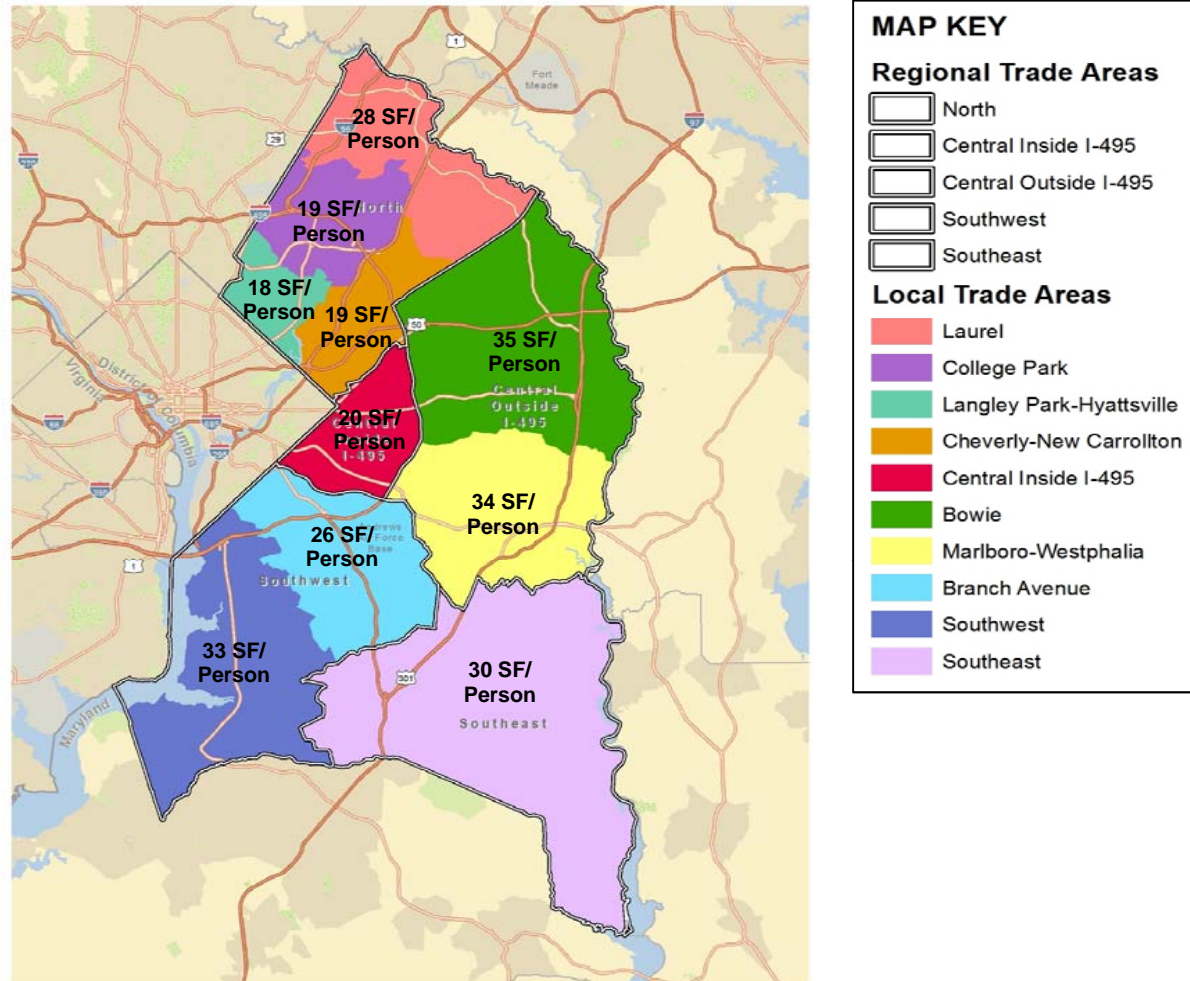
### PRINCE GEORGE'S RETAIL REGIONAL AND LOCAL TRADE AREAS PRINCE GEORGE'S COUNTY, MD 2014



SOURCE: Esri

## Exhibit V-2

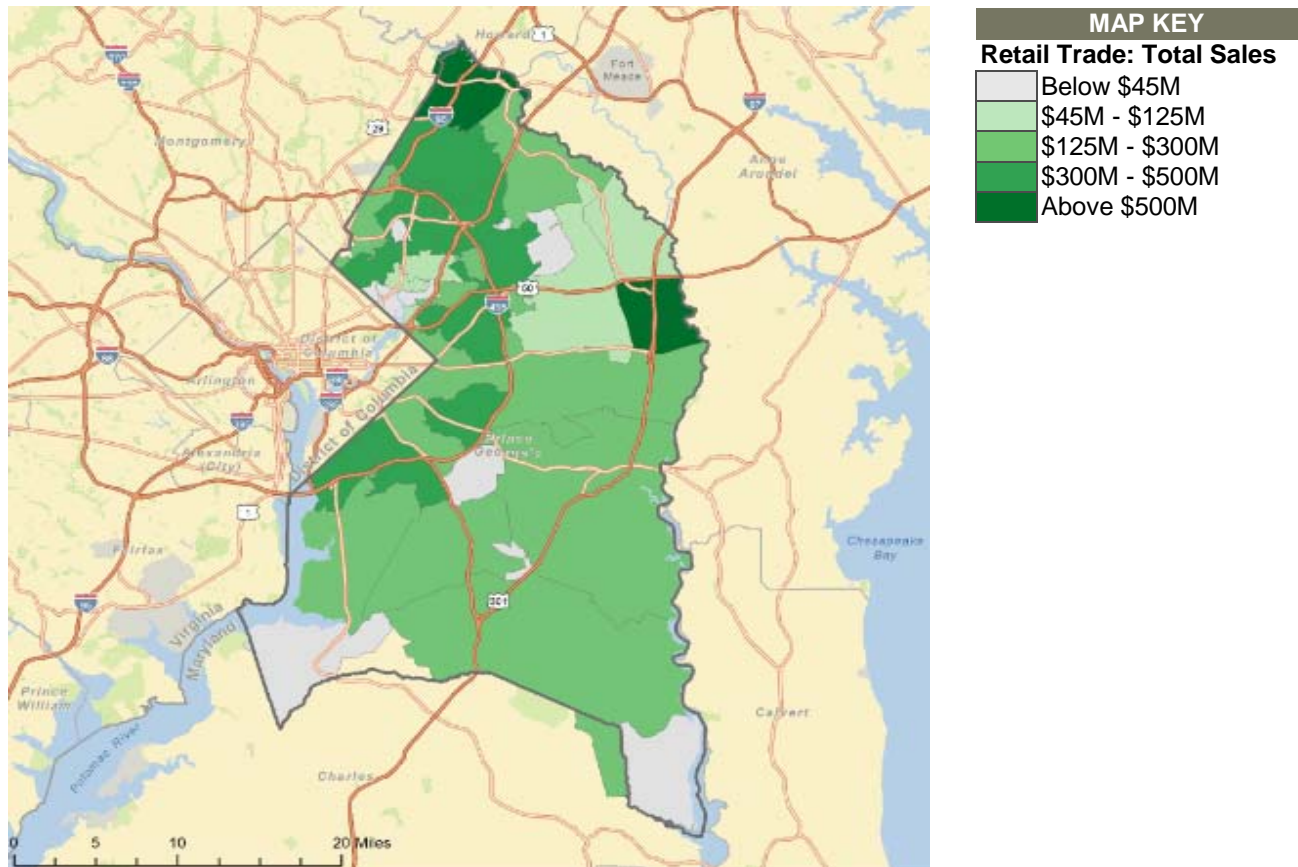
### RETAIL TRADE AREAS AND ASSOCIATED RETAIL DEMAND PER PERSON PRINCE GEORGE'S COUNTY, MD OCTOBER 2014



SOURCE: Esri

## Exhibit V-3

### TOTAL RETAIL SALES VOLUME BY ZIP CODE PRINCE GEORGE'S COUNTY, MD 2014

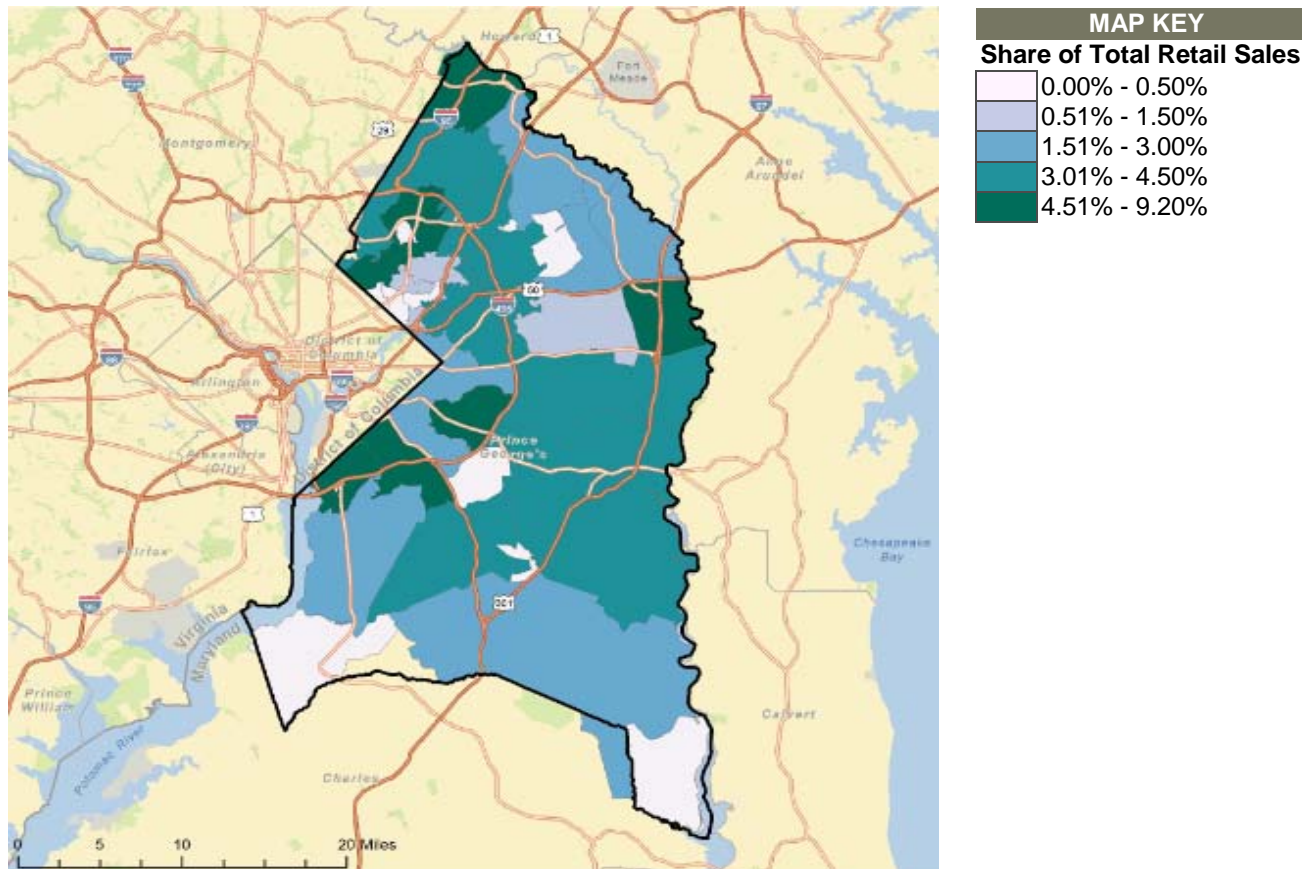


SOURCE: Esri



## Exhibit V-4

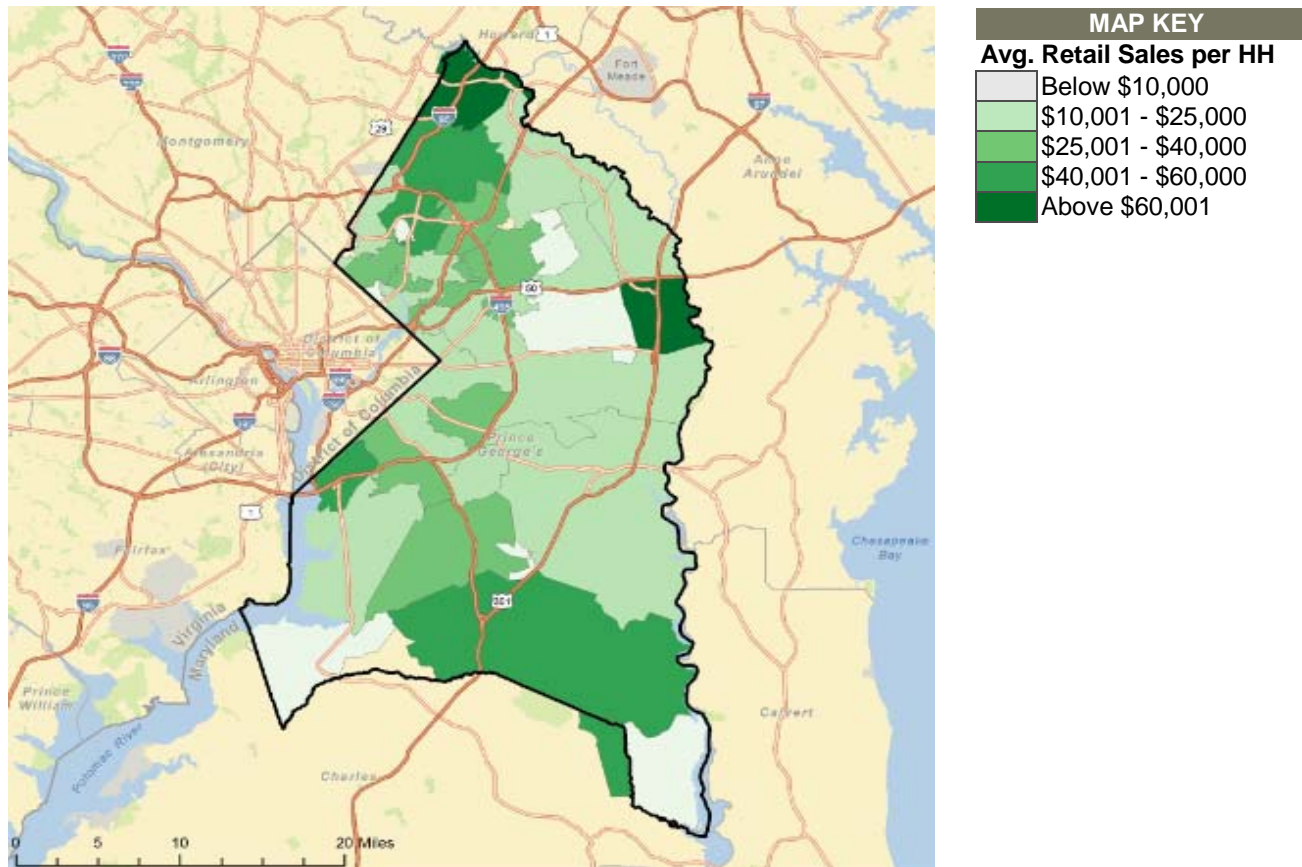
### SHARE OF COUNTY'S TOTAL RETAIL SALES BY ZIP CODE PRINCE GEORGE'S COUNTY, MD 2014



SOURCE: Esri

## Exhibit V-5

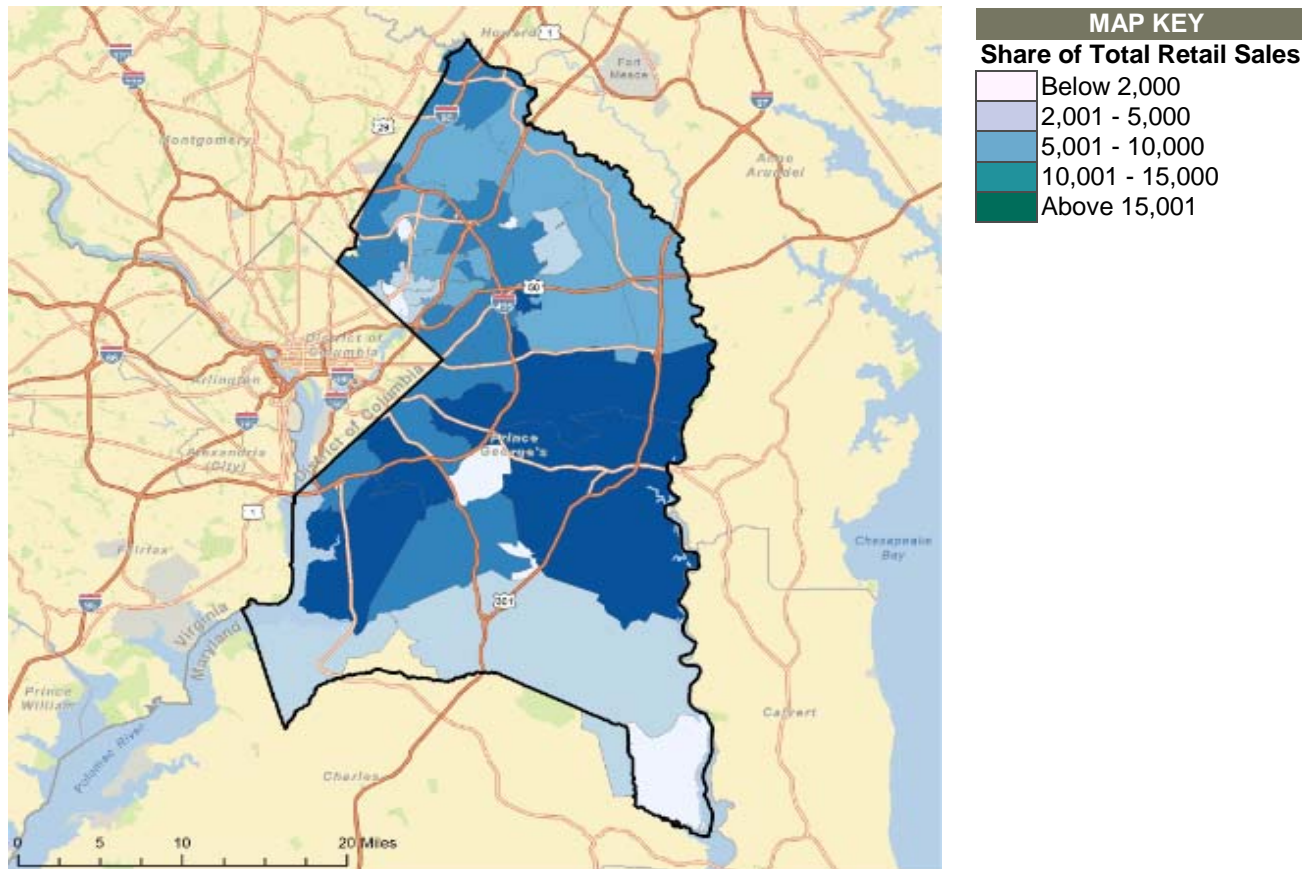
### AVERAGE RETAIL SALES PER HOUSEHOLD BY ZIP CODE PRINCE GEORGE'S COUNTY, MD 2014



SOURCE: Esri

## Exhibit V-6

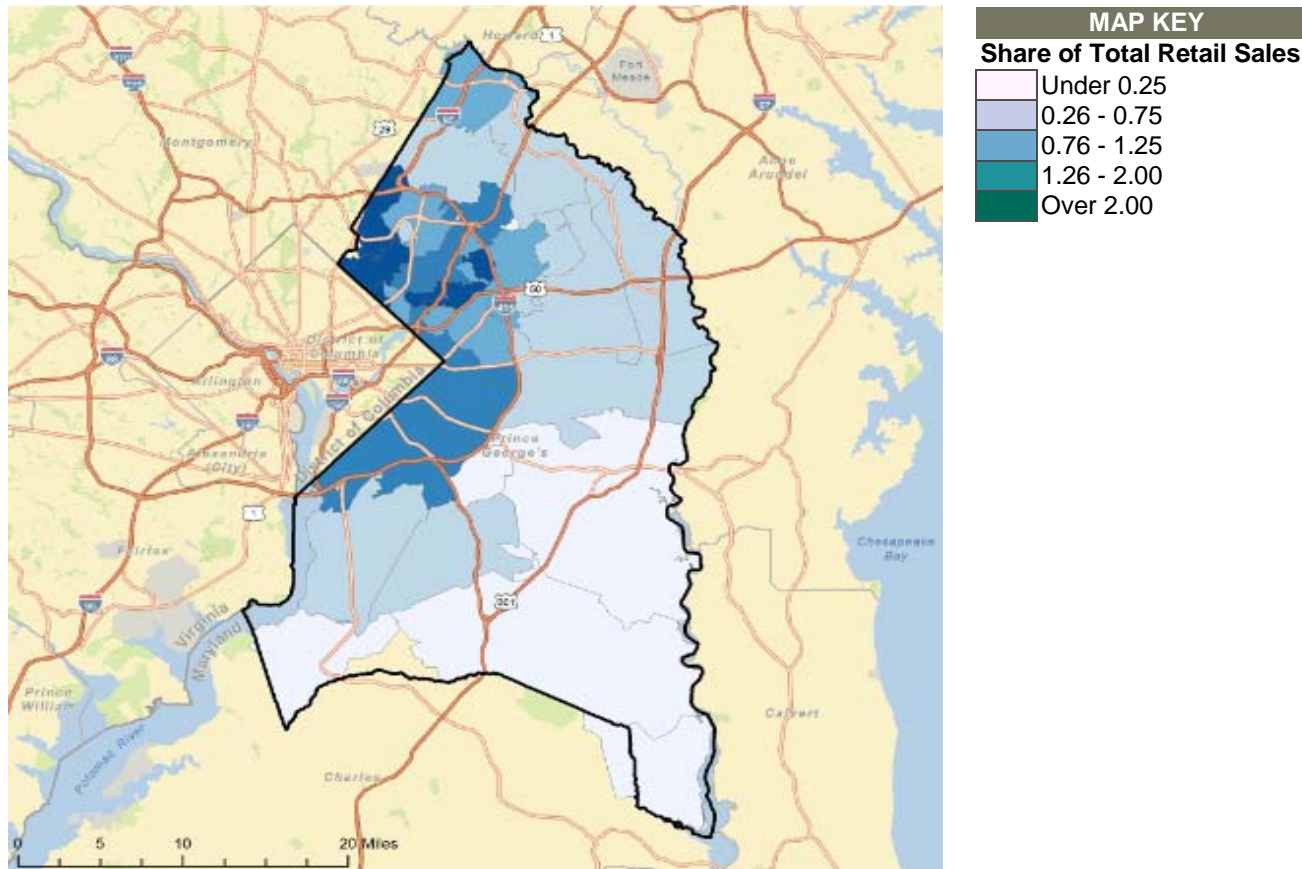
### TOTAL HOUSEHOLDS BY ZIP CODE PRINCE GEORGE'S COUNTY, MD 2013



SOURCE: Esri

## Exhibit V-7

### HOUSEHOLD DENSITY BY ZIP CODE PRINCE GEORGE'S COUNTY, MD 2013

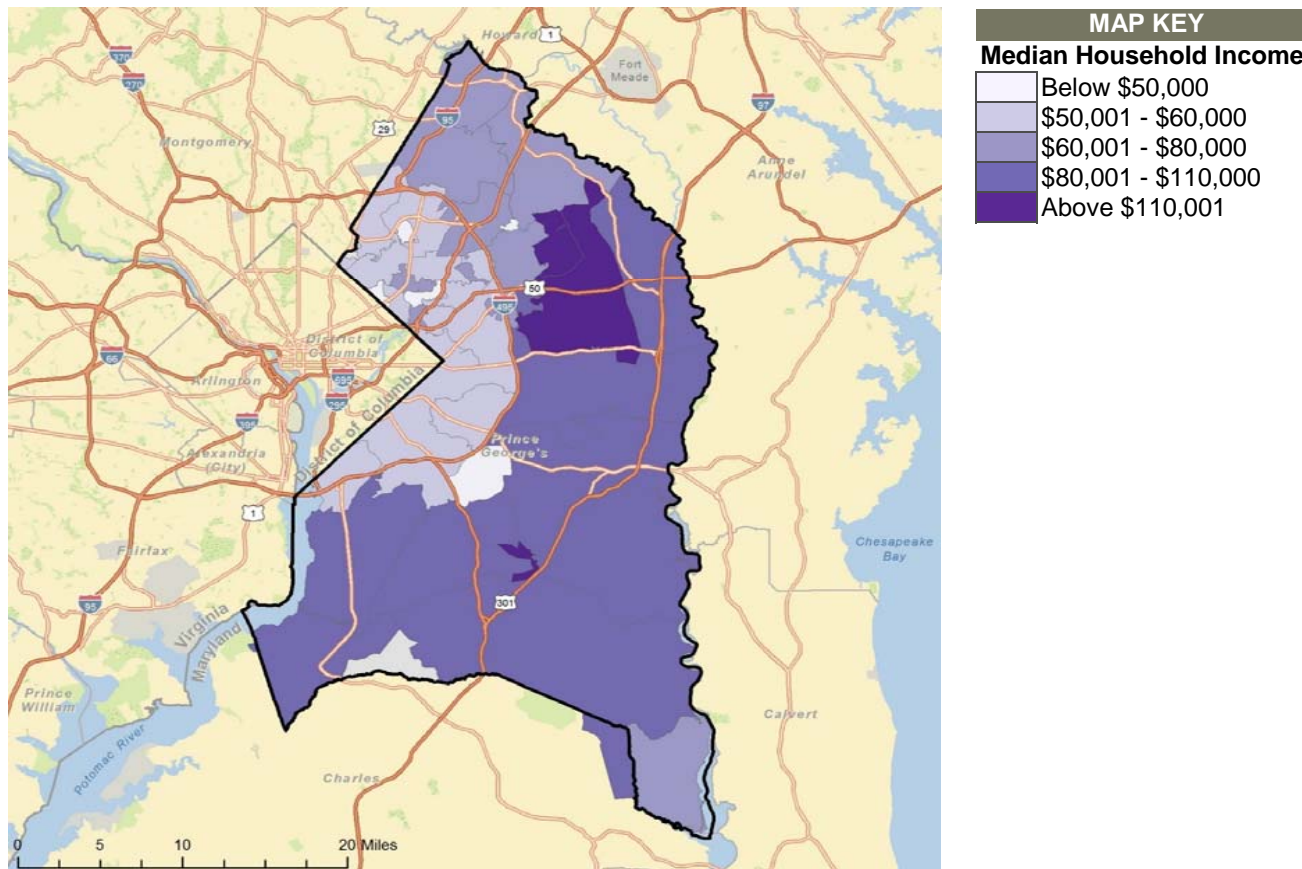


SOURCE: Esri



## Exhibit V-8

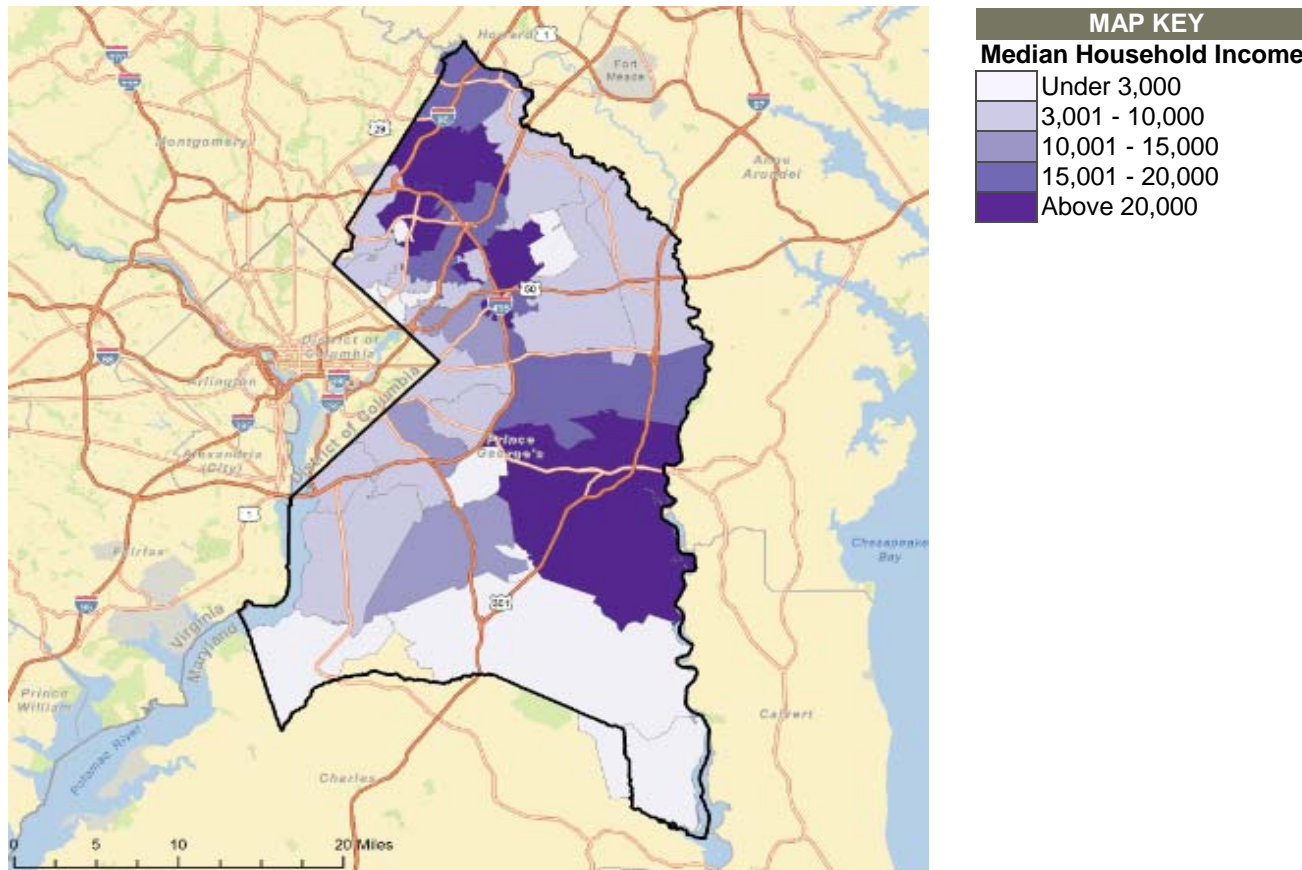
### MEDIAN HOUSEHOLD INCOME BY ZIP CODE PRINCE GEORGE'S COUNTY, MD 2013



SOURCE: Esri Business Analyst

## Exhibit V-9

### NUMBER OF EMPLOYEES PER ZIP CODE PRINCE GEORGE'S COUNTY, MD 2014



SOURCE: Esri

THE MARYLAND-NATIONAL CAPITAL PARK AND PLANNING COMMISSION

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