This report is intended to provide a historical and forward-looking market and transportation assessment of Tysons and provide source material for a forthcoming automated Tysons Partnership data dashboard, which will serve as the go-to information hub for a wide range of stakeholders and promote the growth of Tysons into a more walkable, transit-oriented and vibrant economic engine for Fairfax County and the broader region.

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EXECUTIVE SUMMARY
The population of Tysons grew 4.2% annually from 2010-2018 (39% overall), more than **four times higher than the County average** population growth and significantly greater than comparable submarkets.

Source: ACS 5-Year Estimates
Tysons has maintained its role as a regional retail destination, with **nearly two-thirds of retail spending generated externally by regional visitors**. Tysons’ malls remain the go-to destination for high-quality retailers looking to grow a presence in Metro DC, while continued mixed-use development continues to increase retail options in Planning Districts outside Tysons Central 123.

**Most Retail Spending is Generated by Regional Residents**

- **9,000** Retail jobs in Tysons
- **$3.5B** Tysons annual retail spending
- **35%** Tysons Residents and Workers
- **65%** Regional Visitors

$3.5B accounts for **17%** of total Fairfax retail spending

*Source: ESRI & CoStar*
Executive Summary | Office

Tysons has established itself as the **key employment hub for office workers** in Fairfax County. **Its rate of job growth has outpaced the County's** in the last 5 years and is expected to continue to do so in the next 10. Tysons experienced significant new development starting in 2014, and the Silver Line's opening and projected job growth are likely to solidify **Tysons’ role as an economic driver** for the County.

- **17%**
  - Office-using workers in Tysons
  - (81% of **107,000 total workers**)

- **+5%**
  - Projected office-using Tysons job growth in next 5 years

- **34%**
  - Tysons share of Fairfax County development pipeline

*Source: EMSI (employment) and CoStar (real estate)*
Between 2015 and 2019, Tysons outperformed Fairfax County and the Washington, D.C., MSA in its inventory growth rate, decline in vacancy, and increase in rents. Among its key strengths are Tysons’ central location and skilled workforce, while its weaknesses are its congestion and lack of brand among employers, workers, and key investors. In the future, Tysons will need to continue adapting itself to evolving workforce and industry trends and solidify its identity as an integrated mixed-use district.

| Change (2015-2019) |  
|-------------------|-------------------|
| Inventory         | +7%               |
| Vacancy           | -4 percentage points |
| Rents             | +20%              |

Source: EMSI (employment) and CoStar (real estate)
Executive Summary | Hotel

Tysons’ large share of upscale and luxury rooms (90%) supported faster growth in average daily rates than in Crystal City/Rosslyn and the MSA in this period. Occupancy dipped slightly in 2018 due to an increase in supply before rebounding in 2019.

Source: Kalibri Labs
Executive Summary | Hotel

Total room inventory increased 11.2% between 2015 and 2019, while occupancy decreased only 2.6 percentage points. This suggests that substantial new hotel supply was delivered with only a modest impact on occupancy prior to COVID-19.

Source: Kalibri Labs. Note: Occupancy declined in 2020 due to COVID-19; there was no impact in 2019.
Executive Summary | Residential

Since 2010, the total housing stock in Tysons has increased 34%, driven by mid- and high-rise development.

**13.8K**
Housing Units

**34%**
Unit Growth Since 2010

**143%**
Mid- and High-Rise Unit Growth

Total Housing Units by Type 2010-2019

Source: HR&A analysis of Fairfax County open geospatial data
Executive Summary | Transportation – Key Goals

The Fairfax County Comprehensive Plan for the Tysons area envisions a transformed 24-hour urban center by 2050, where people live, work, and play. Increasing mobility options and shifting away from over-reliance on auto-centric transportation infrastructure will help Tysons reach this goal.

To assess where Tysons is headed, this study focuses on three key questions:

- How walkable is Tysons?
- How transit accessible is Tysons?
- How bikeable is Tysons?
Executive Summary | Transportation – Commuting

While Tysons is a major employment hub for people all around the region, 38% of workers commute from locations in Fairfax County.

Most commuters coming from outside of Tysons come from points to the west like Reston and Loudoun County, with significant numbers also commuting from Arlington and DC. The average commute distance for commuters to Tysons is 26.9 miles.*


* As a point of reference, the average commute distance for Washington, DC is 39.1 miles. Source: https://www.answerfinancial.com/insurance-center/which-states-have-the-longest-commute/
Tysons Partnership Market Study | Transportation – Transit Accessibility

Tysons is well-connected to major destinations in Northern Virginia and Downtown DC through both Metrorail access and several bus providers (Fairfax Connector, Metro Bus, and OmniRide). Lengthy travel times are often a barrier to more people riding transit.

### Population Accessible by Transit

<table>
<thead>
<tr>
<th>Year</th>
<th>10 Minutes</th>
<th>15 minutes</th>
<th>30 Minutes</th>
</tr>
</thead>
<tbody>
<tr>
<td>2015</td>
<td>41K</td>
<td>472K</td>
<td>117K</td>
</tr>
<tr>
<td>2020</td>
<td>47K</td>
<td>511K</td>
<td>129K</td>
</tr>
<tr>
<td>2025</td>
<td>66K</td>
<td>669K</td>
<td>169K</td>
</tr>
<tr>
<td>2030</td>
<td>78K</td>
<td>196K</td>
<td>642K</td>
</tr>
</tbody>
</table>

### Jobs Accessible by Transit

<table>
<thead>
<tr>
<th>Year</th>
<th>10 Minutes</th>
<th>15 minutes</th>
<th>30 Minutes</th>
</tr>
</thead>
<tbody>
<tr>
<td>2015</td>
<td>100K</td>
<td>226K</td>
<td>113K</td>
</tr>
<tr>
<td>2020</td>
<td>107K</td>
<td>241K</td>
<td>214K</td>
</tr>
<tr>
<td>2025</td>
<td>114K</td>
<td>255K</td>
<td>284K</td>
</tr>
<tr>
<td>2030</td>
<td>127K</td>
<td>284K</td>
<td>847K</td>
</tr>
</tbody>
</table>

Source: GTFS, Targomo Transit Travel Times, MWCOG Regional Forecast
The Silver Line opened in 2014 with four stations in Tysons: McLean, Tysons Corner Station, Greensboro, and Spring Hill. Overall ridership has grown year over year every year since the line debuted at each station from 2014 – 2019. Ridership for the first 2.5 months of 2020 was on track to continue growing but dropped significantly due to the COVID-19 pandemic. After closing for repairs in Summer 2020, ridership in August began to rise again.

Source: WMATA
Tysons aims to become a walkable, urban center by encouraging **transit-oriented development** around the four metro stations and improving the pedestrian experience through infrastructure improvements.

Currently, areas near the **Greensboro Metro Station** in Tysons Central 7 are the **most walkable** according to Walk Score and Tysons East and East Side near the **Mclean Metro** station are the **least walkable**. Overall, Tysons has a walk score of 54 – “**somewhat walkable**.”

**Share of Tysons Addresses by Walk Score Category**

- Very Car-Dependent (0 - 24): 3%
- Car-Dependent (25 - 49): 35%
- Somewhat Walkable (50 - 69): 46%
- Very Walkable (70 - 89): 17%

**Walk Score**

- 0 (Car Dependent)
- 100 (Extremely Walkable)

*Source: WalkScore.com, Fairfax County GIS*
Compared to Walkability or Transit Ridership/Coverage, Tysons struggles more with bikeability. **39% of road segments** in Tysons are rated “caution” by the Fairfax County Department of Transportation. Areas of comparable bike friendliness are often isolated and do not necessarily connect neighborhoods or across busy intersections and streets like Route 7.

**Bike Route Classification - Mileage**

<table>
<thead>
<tr>
<th></th>
<th>Mileage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Caution</td>
<td>9.9</td>
</tr>
<tr>
<td>Less Preferred</td>
<td>7.1</td>
</tr>
<tr>
<td>Somewhat</td>
<td>5.7</td>
</tr>
<tr>
<td>Preferred</td>
<td>2.4</td>
</tr>
</tbody>
</table>

**Source:** Fairfax County Department of Transportation
The COVID-19 Pandemic has altered formerly routine, daily behaviors including significantly impacting the daily commute. Using mobility data from Mapbox, we can examine a baseline level of mobility and track how this is changing over time. Compared to January 2020, Tysons reached a low in April of only 56% of the level of movement. As of August 2020, the Tysons area had returned to 66% of the January baseline.

**Movement Index - Avg by Month**

*Source: Mapbox Activity Index*
1. Tysons has continually **out-performed comparative markets** both regionally and nationally in recent years.

2. Although many sectors in Tysons experienced some **market weakening due to COVID-19**, the multidimensional economy and workforce within Tysons position the district to help **lead the economic recovery** in the region and in Fairfax County.

3. Continued infrastructure investment will ensure that Tysons continues to evolve from a drivable suburban commercial center to a **walkable transit-oriented, inclusive, and livable mixed-use urban center**.
The population of Tysons has grown 4.2% annually in recent years, more than four times higher than the County average population growth and significantly greater than comparable submarkets.

**Demographics | Population**

- **Tysons**: 28K Residents
  - 2019 Population**
  - **4.2%** Annual growth*

*based on 5 years ending 2010 and 2018
**Based on Fairfax County estimates

Source: ACS 5-Year Estimates, HR&A analysis of Fairfax County open geospatial data
Demographics | Households

Household growth in Tysons is consistent with population growth, and *significantly outpaces growth* in the County and in comparable submarkets.

**Tysons**

11K

2018 Households

25%

Total Growth 2010-2018

Household Growth 2010-2018*

<table>
<thead>
<tr>
<th>Location</th>
<th>Household Growth 2010-2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tysons</td>
<td>25%</td>
</tr>
<tr>
<td>Arlington</td>
<td>14%</td>
</tr>
<tr>
<td>Bellevue</td>
<td>13%</td>
</tr>
<tr>
<td>Buckhead</td>
<td>10%</td>
</tr>
<tr>
<td>DC MSA</td>
<td>9%</td>
</tr>
<tr>
<td>Stamford</td>
<td>7%</td>
</tr>
<tr>
<td>Fairfax County</td>
<td>3%</td>
</tr>
</tbody>
</table>

*based on 5 years ending 2018

Source: ACS 5-Year Estimates
Tysons is more densely populated than most comparable submarkets and the County, with 6.7K residents per square mile and 3.2K households per square mile. Fairfax County remains the least densely populated both in terms of households and population density per square mile after the DC MSA.

Source: ACS 5-Year Estimates, HR&A analysis of Fairfax County open geospatial data
Demographics | Median Income

Median income in Tysons is below the Fairfax County average of $121K, reflecting its slightly younger population and a higher concentration of renters with lower household incomes than Tysons homeowners.

<table>
<thead>
<tr>
<th>Location</th>
<th>Median Income</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fairfax County</td>
<td>$121K</td>
</tr>
<tr>
<td>Arlington</td>
<td>$117K</td>
</tr>
<tr>
<td>Bellevue</td>
<td>$112K</td>
</tr>
<tr>
<td>Tysons</td>
<td>$102K</td>
</tr>
<tr>
<td>DC MSA</td>
<td>$101K</td>
</tr>
<tr>
<td>Buckhead</td>
<td>$95K</td>
</tr>
<tr>
<td>Stamford</td>
<td>$89K</td>
</tr>
</tbody>
</table>

2018 Median Income: $102K

Growth since 2010: 8.5%

Source: ACS 5-Year Estimates
Demographics | Age

Age distribution in Tysons is consistent with the County, with a slightly higher population of residents age 18-54. **Median age in Tysons is 36 years**, below the County median of 39 years.

Tysons Age Distribution is Similar to County

<table>
<thead>
<tr>
<th>Age group</th>
<th>Tysons</th>
<th>Fairfax County</th>
</tr>
</thead>
<tbody>
<tr>
<td>Under 18</td>
<td>19%</td>
<td>24%</td>
</tr>
<tr>
<td>18-34</td>
<td>29%</td>
<td>22%</td>
</tr>
<tr>
<td>35-54</td>
<td>29%</td>
<td>29%</td>
</tr>
<tr>
<td>55 And Up</td>
<td>22%</td>
<td>25%</td>
</tr>
</tbody>
</table>

*Source: ACS 5-Year Estimates*
Tysons is predominantly white, **mirroring the breakdown of Fairfax County and the MSA**. Compared to the DC MSA, Tysons has a larger Asian population and a smaller Black or African American population.

### Tysons CDP Race
- **Asian Alone**: 30%
- **White Alone**: 58%
- **Black or African American Alone**: 6%
- **Other Race/s**: 7%

### DC MSA Race
- **White Alone**: 54%
- **Black or African American Alone**: 25%
- **Asian Alone**: 10%
- **Other Race/s**: 11%

*Source: ACS 5-Year Estimates*
Tysons residents on average have **more schooling than residents in Fairfax County**, with 78% having a Bachelor's, Master's, or higher, compared to the County average of 61%.

**Educational Attainment for Residents over 25**

- **Bachelor's, Master's, or Higher**
  - Tysons: 78%
  - Fairfax County: 61%

- **Less than a Bachelor's Degree**
  - Tysons: 23%
  - Fairfax County: 39%

*Source: ACS 5-Year Estimates*
Demographics | Projected Household Growth

The number of households in the area is expected to increase over the next three decades to between 36K and 57K as residential growth in Tysons continues. Long-term growth will depend on multiple factors, including the supply of new housing, the adherence of new development to Comprehensive Plan goals, demographic and employment trends, and more.

![Projected Household Growth Graph](image)

Source: HR&A analysis of Fairfax County open geospatial data, HR&A Sensitivity Assumptions
Demographics | Projected Household Growth

Total household growth in Tysons over the next five years is projected to **significantly outpace** that of comparable submarkets, with less growth projected for the surrounding County.

Projected Household Growth 2020-2025

- **Tysons**: 35%
- **Buckhead**: 11%
- **Bellevue**: 6%
- **Arlington**: 6%
- **Stamford**: 5%
- **Fairfax County**: 2%

Source: ESRI, HR&A analysis of Fairfax County open geospatial data
Five psychographic clusters account for nearly 90% of residents in Tysons and more than half the population is either a member of Metro Renters or Enterprising Professionals cluster, groups with a preference for urban living either due to employment opportunities or city amenities.

Tysons Psychographic Distribution

<table>
<thead>
<tr>
<th>Cluster</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Metro Renters</td>
<td>30%</td>
</tr>
<tr>
<td>Enterprising Professionals</td>
<td>26%</td>
</tr>
<tr>
<td>Golden Years</td>
<td>14%</td>
</tr>
<tr>
<td>Professional Pride</td>
<td>9%</td>
</tr>
<tr>
<td>Laptops and Lattes</td>
<td>8%</td>
</tr>
<tr>
<td>Top Tier</td>
<td>7%</td>
</tr>
<tr>
<td>Urban Chic</td>
<td>7%</td>
</tr>
</tbody>
</table>

Source: ESRI
The leading five groups have a median household income range of $67K to $138K and an age range of 33 to 52.*

<table>
<thead>
<tr>
<th>Demographics</th>
<th>Psychographic Cluster Profiles</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Median Income by Group</strong></td>
<td><strong>Median Age by Group</strong></td>
</tr>
<tr>
<td>Metro Renters</td>
<td>$67K</td>
</tr>
<tr>
<td>Enterprising Professionals</td>
<td>$84K</td>
</tr>
<tr>
<td>Golden Years</td>
<td>$72K</td>
</tr>
<tr>
<td>Professional Pride</td>
<td>$138K</td>
</tr>
<tr>
<td>Laptops and Lattes</td>
<td>$112K</td>
</tr>
</tbody>
</table>

*Reflects national data for clusters that are predominant in Tysons

Source: ESRI
Tysons’ top 5 groups all spend on average more than the national average, with the top 3 groups (70% of Tysons population) spending **30% more across all consumer categories** than the national average, while *Professional Pride* and *Laptops and Lattes* (nearly 20% of Tysons population), spending **110% more across all categories**.

Source: ESRI
Comparable submarkets are similarly weighted towards *Metro Renters* yet have smaller shares of *Enterprising Professionals* and *Professional Pride*, reflective of the strong office market in Tysons.

**Demographics | Psychographic Cluster Comparison**

Source: ESRI
Housing tenure across Tysons and Fairfax County is reversed, with most Tysons residents renting rather than owning. This is reflective of the available housing stock in Tysons, as well as underlying psychographic trends more weighted toward renter groups like Metro Renters and Enterprising Professionals.

Tysons Has a Higher Share of Renters

Source: ACS 5-Year Estimates
RETAIL
Tysons has maintained its role as a regional retail destination, with nearly two-thirds of retail spending generated externally by regional visitors. Tysons’ malls remain the go-to market for high-quality retailers looking to grow a presence in Metro DC, while continued mixed-use development continues to increase retail options in Planning Districts outside Tysons Central 123.

Most Retail Spending is Generated by Regional Residents

- 35% Tysons Residents and Workers
- 65% Regional Visitors
- $3.5B accounts for 17% of total Fairfax retail spending*

9,000 Retail jobs in Tysons

$3.5B Tysons annual retail spending

*Tysons total sales/sf = $670, excluding auto sales/sf = $440; Fairfax = $440 and $380

Source: ESRI, EMSI, CoStar
5.4 million sf of retail use accounts for **11% of the total building stock in Tysons** (5.4M sf), behind office (55%) and multi-family (25%). Compared to the DC MSA, Tysons retail use for a smaller share of overall real estate product.

**Retail | Inventory**

- **Inventory**: 5.4M SF
- **Under Construction**: 110K SF
- **Proposed**: 130K SF

**Retail Share of Total Product**

- **Tysons**: 16%
- **DC MSA**: 25%

*Source: CoStar*
Retail deliveries in 2019 and 2020 were not immediately absorbed and contributed to an increase in vacancy, although **positive net absorption continues to decrease rates** from a decade-high of 3.1%. Inventory growth and COVID-19 impacts have increased vacancy from a 2020 midyear low of 1.9% to 2.5%, **well below the DC MSA average** of 5%.

Tysons Retail Market Performance (2010-2020)

- **Change in Inventory**
- **Net Absorption**
- **Vacancy Rate**

Source: CoStar
2020 YTD retail vacancy is below the Tysons’ peer average of 3%, and below the Fairfax County average. As of November, vacancy in Tysons is below its 2019 average of 3.1%, although it remains above its 10-year average of 1.5%.
Over the past decade, the Tysons market has experienced a 5.5% increase in total retail inventory, the highest rate among its peers and the DC Metro area. Combined with increasing rents and low vacancy, rapid inventory growth reinforces the enduring strength of Tysons as a regional shopping destination.

Source: CoStar
There is nearly 200 sf of retail space per resident in Tysons, **five times the Fairfax County average** and almost twice that of the next peer. However, there is only 50 sf of retail space per worker in Tysons, reflecting its larger role as a **regional job center** than a residential hub.

### Retail SF per Capita

<table>
<thead>
<tr>
<th>City</th>
<th>Retail SF per Capita</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tysons</td>
<td>191 SF</td>
</tr>
<tr>
<td>Buckhead</td>
<td>101 SF</td>
</tr>
<tr>
<td>Bellevue</td>
<td>64 SF</td>
</tr>
<tr>
<td>Stamford</td>
<td>51 SF</td>
</tr>
<tr>
<td>DC MSA</td>
<td>42 SF</td>
</tr>
<tr>
<td>Fairfax County</td>
<td>39 SF</td>
</tr>
<tr>
<td>Arlington</td>
<td>27 SF</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>City</th>
<th>Retail SF per Worker</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tysons</td>
<td>100 SF</td>
</tr>
<tr>
<td>Buckhead</td>
<td>95 SF</td>
</tr>
<tr>
<td>Bellevue</td>
<td>90 SF</td>
</tr>
<tr>
<td>Fairfax County</td>
<td>86 SF</td>
</tr>
<tr>
<td>Arlington</td>
<td>68 SF</td>
</tr>
<tr>
<td>Tysons</td>
<td>52 SF</td>
</tr>
<tr>
<td>Arlington</td>
<td>45 SF</td>
</tr>
</tbody>
</table>

Source: CoStar, ACS 5-Year Estimates
Despite its growth in retail inventory, average retail rents in Tysons of $40/sf remain **well above those of peers**, and more than 30% **higher than the County average** of $31/sf.
Retail is concentrated in the Tysons Central 123 planning district, where the **Tysons Corner Center** supports nearly 2M SF, and the **Tysons Galleria** supports another 800K SF.

Source: CoStar
Nearly 70% of all retail space is concentrated within ¼ mile of a metro station, and metro plays a critical role in expanding regional transit access to retail in Tysons.

Share of Total Retail Space Near Metro Stations

- **Tysons**: 39% (2,000K SF)
- **Spring Hill**: 15% (800K SF)
- **Greensboro**: 12% (650K SF)

*Source: CoStar, HR&A Analysis*
The top 5 retail industries in Tysons account for **more than 85% of total retail sales annually**. Automobile dealers retain the largest share of sales in Tysons, with 14 dealerships accounting for more than 40% of aggregate spending in the CDP.

Source: ESRI
Retail employment in the area is **concentrated in 4 occupations** and distributed across several retail industries.

**2019 Top Retail Occupations**

<table>
<thead>
<tr>
<th>Occupation</th>
<th>Employment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Retail Salespersons</td>
<td>3200</td>
</tr>
<tr>
<td>Cashiers</td>
<td>1400</td>
</tr>
<tr>
<td>Retail Supervisors</td>
<td>800</td>
</tr>
<tr>
<td>Stockers and Order Fillers</td>
<td>500</td>
</tr>
</tbody>
</table>

**Top Retail Occupations by Retail Industry**

- Clothing Stores: 31%
- General Merchandise Stores: 16%
- Electronics and Appliance Stores: 10%
- Furniture and Home Furnishings Stores: 6%
- Motor Vehicle and Parts Dealers: 5%
- Other: 33%

Source: EMSI
Although Tysons remains a retail destination for clothing, general merchandise, and electronics, it is currently underserved in grocery, health, and drinking establishments, sectors that are critical for improving livability for existing and expected new residents.

Unmet Spending Potential or Surplus

* This analysis considers Tysons residents, university students, workers, and 25 million annual visitors

Source: ESRI, HR&A Analysis
Within 10-minute walksheds of Tysons metro stations, potential retail spending in some categories is not met locally. The Grocery and Health retail categories have the largest unmet retail spending potential across all station areas, translating into more than 100K SF of new retail that could be supported by residents in these walksheds.

Retail Spending Potential by Metro Station Area

- **Spring Hill**: 35K sf
- **Greensboro**: 40K sf
- **Tysons**: 55K sf
- **McLean**: 160K sf

**Source**: ESRI, HR&A Analysis
COVID-19 | Consumer Spending Impacts

While the public health and economic situations remain fluid, the Tysons retail market has been negatively impacted by COVID-19 with retail spending in the DC MSA down 14% compared to January 2020.

Total consumer spending in the DC Metro area fell more than 30%, with the greatest declines experienced by transportation, entertainment and recreation, and restaurants and hotels spending.
OFFICE
Office | Office Workers Dominate Employment in Tysons

Office-using industries constitute 8 of the top 10 employers in Tysons. Together, the ten office-using industries employ just over 80% of the local workforce. Two of every five workers are employed in Professional Services, which is by far the largest industry in the area.

**Employment in Office-Using Industries (2020)**

<table>
<thead>
<tr>
<th>Industry</th>
<th>Employment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Professional Services</td>
<td>41,800</td>
</tr>
<tr>
<td>Finance and Insurance</td>
<td>11,400</td>
</tr>
<tr>
<td>Administration</td>
<td>6,700</td>
</tr>
<tr>
<td>Management</td>
<td>6,300</td>
</tr>
<tr>
<td>Health Care</td>
<td>5,100</td>
</tr>
<tr>
<td>Wholesale Trade</td>
<td>3,800</td>
</tr>
<tr>
<td>Information</td>
<td>3,600</td>
</tr>
<tr>
<td>Real Estate</td>
<td>3,300</td>
</tr>
<tr>
<td>Government</td>
<td>2,700</td>
</tr>
<tr>
<td>Education</td>
<td>1,300</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>107,000</strong></td>
</tr>
</tbody>
</table>

**Office**

107,000  
Total workers

86,000  
Office-using workers  
(81% of total)

17%  
Tysons’ share of Fairfax County office-using jobs*

* Merrifield/West Falls Church Area: 15%, Reston: 11%, Chantilly: 8%

Source: EMSI. Note: Area of analysis are ZIP Codes 22102 and 22182, which include small areas outside of Tysons.
Tysons **outpaced growth in surrounding Fairfax County** and City and in the D.C. MSA in the last five years and is projected to **continue growing faster** in the next five. Health Care has the fastest past (42%) and projected (24%) growth rates.

Tysons Net Change in Jobs by Industry (2015-2025)

<table>
<thead>
<tr>
<th>Industry</th>
<th>2015-2020</th>
<th>2020-2025 (Projected Change)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Professional Services</td>
<td></td>
<td>+3,900</td>
</tr>
<tr>
<td>Finance and Insurance</td>
<td></td>
<td>+2,400</td>
</tr>
<tr>
<td>Health Care</td>
<td></td>
<td>+2,700</td>
</tr>
<tr>
<td>Administration</td>
<td></td>
<td>+1,100</td>
</tr>
<tr>
<td>Management</td>
<td></td>
<td>+900</td>
</tr>
<tr>
<td>Real Estate</td>
<td></td>
<td>+400</td>
</tr>
<tr>
<td>Government</td>
<td></td>
<td>+200</td>
</tr>
<tr>
<td>Education</td>
<td></td>
<td>+100</td>
</tr>
<tr>
<td>Wholesale Trade</td>
<td></td>
<td>+700</td>
</tr>
<tr>
<td>Information</td>
<td>-400</td>
<td></td>
</tr>
</tbody>
</table>

Source: EMSI. Note: Area of analysis are ZIP Codes 22102 and 22182, which include small areas outside of Tysons.
The 10 largest office-using occupations account for more than a third of Tysons’ workers. The median annual earnings for these 10 occupations was $95,000, 48% above Fairfax County’s median of $64,000.

Office | Ten Office Occupations Account for a Third of Tysons Workers

<table>
<thead>
<tr>
<th>Occupation</th>
<th>Employment (2020)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Software Developers</td>
<td>7,700</td>
</tr>
<tr>
<td>Accountants and Auditors</td>
<td>5,800</td>
</tr>
<tr>
<td>Management Analysts</td>
<td>4,400</td>
</tr>
<tr>
<td>Computer Analysts</td>
<td>3,700</td>
</tr>
<tr>
<td>Customer Service Representatives</td>
<td>2,700</td>
</tr>
<tr>
<td>Managers</td>
<td>2,500</td>
</tr>
<tr>
<td>Database Administrators</td>
<td>2,400</td>
</tr>
<tr>
<td>Office Clerks</td>
<td>2,200</td>
</tr>
<tr>
<td>Accounting Clerks</td>
<td>2,100</td>
</tr>
<tr>
<td>Administrative Assistants</td>
<td>1,900</td>
</tr>
</tbody>
</table>

34,400 Office-using workers (34% of total)

$95,000 Median annual earnings (Weighted average)

Source: EMSI, U.S. Census Bureau. Note: Area of analysis are ZIP Codes 22102 and 22182, which include small areas outside of Tysons. Occupation defined as 4-digit SOC codes.
Office | Significant White-Collar Employment Is a Competitive Advantage

Tysons’ Professional Services, Finance and Insurance, and Management cluster represents Tysons’ competitive advantage as a hub for skilled, private-sector professionals. Tysons lags Fairfax and the D.C. MSA in Health Care and Government.

Source: EMSI. Note: Fairfax County includes Fairfax City.
Most of Tysons’ inventory exists in buildings sized **250K SF and larger** along its central and northeastern planning districts.

### Office Inventory by Planning District

- **Tysons Central 7**: 6.0M SF
- **North Central**: 5.0M SF
- **Tysons East**: 4.4M SF
- **Old Courthouse**: 4.4M SF
- **Tysons Central 123**: 4.0M SF
- **Tysons West**: 3.0M SF
- **East Side**: 1.0M SF
- **West Side**: 0.0M SF

![Office Inventory by Planning District](image-url)
Tysons experienced slow office activity until 2015, when a series of new deliveries began. Since 2016, absorption generally outpaced supply, driving down vacancy by more than 3 percentage points before a reversal in Q3 of 2020.
Office vacancy **decreased between 2015 and 2019**, before increasing again in Q3 of 2020.

**Change (2015-2019)**

-4

Tysons

-2

Fairfax County

-1

Washington, D.C., MSA

**Office Vacancy (2010-2020 YTD)**

Silver Line opens in July 2014

Source: CoStar. Note: Year to date (YTD) as of early October 2020; Fairfax County includes Fairfax City.
**Office** | Tysons Rents Are Growing, But With Some Volatility

*Rents have increased steadily in the D.C. MSA.* Tysons’ rents displayed the most variation, likely because of its rapid growth rate and smaller size relative to the other two areas.

**Change (2015-2019)**

- **+14%**
  - Tysons

- **+9%**
  - Fairfax County

- **+10%**
  - Washington, D.C., MSA

---

**Office Gross Average Rents Per Square Foot (2010-2020 YTD)**

- **Tysons**
- **Fairfax County**
- **Washington, D.C., MSA**

*Silver Line opens in July 2014*

- $28
- $30
- $31
- $34
- $35
- $38

---

*Source: CoStar. Note: Year to date (YTD) as of early October 2020; Fairfax County includes Fairfax City.*
After remaining constant between 2010 and 2015, **inventory grew by 7% starting in 2015**, with a total of **1.9M square feet of new space** added in the last 5 years.
Tysons experienced the highest growth rate of office product among comparable submarkets and regional benchmarks between 2010 and 2019.

Inventory Change (2010-2019)

- Tysons, VA: 7.6%
- Bellevue, WA: 6.3%
- Fairfax County: 4.7%
- Arlington, VA: 4.0%
- Stamford, CT: 2.7%
- Buckhead, GA: -0.3%

Source: CoStar
Although office rents in Tysons are lower than those in the D.C. MSA, it has caught up in the last 10 years and its relative performance in this period has been the best among comparison edge cities.

Source: CoStar
Class A office space constitutes nearly **75% of existing inventory**. The current project that is under construction and more than 75% of proposed projects are also Class A.

![Office Space Inventory and Pipeline by Class (2020)](image)

**Source:** CoStar
The extension of the Silver Line to Tysons spurred interest in office development, which in turn led to the growth of a strong pipeline. As a result, Tysons has more proposed projects than either the County or the MSA in proportion to existing inventory.

**Office Space Pipeline by Market and Status (2020)**

- **Tysons**: 8.3M SF (Under Construction), 0.4M SF (Proposed)
- **Fairfax County**: 22.8M SF (Under Construction), 2.7M SF (Proposed)
- **Washington, D.C., MSA**: 67.9M SF (Under Construction), 8.9M SF (Proposed)

**Office Space Pipeline by Market and Status, as Share of Existing Inventory (2020)**

- **Tysons**: 1% (Under Construction), 2% (Proposed)
- **Fairfax County**: 19% (Under Construction), 2% (Proposed)
- **Washington, D.C., MSA**: 13% (Under Construction), 2% (Proposed)

*Source: CoStar. Note: Fairfax County includes Fairfax City*
Using three different methods to project growth for the next 10 years yields a range of **1.9M to 4.5M SF of new office product** (7-17%). The most conservative forecast uses job growth in office workers to calculate the demand for new office space, holding vacancy constant. The most optimistic is based on projecting the current pipeline with project attrition.

**Tysons Office Growth Forecasts (2020-2030)**

<table>
<thead>
<tr>
<th>Past Actual Growth</th>
<th>Forecast Growth</th>
</tr>
</thead>
<tbody>
<tr>
<td>Actual Inventory Growth, 2010-2019</td>
<td>4.5M SF +17%</td>
</tr>
<tr>
<td>2.0M SF +8%</td>
<td>2.1M SF +8%</td>
</tr>
<tr>
<td>Projection 1: Holding 2010-2019 Rate of Change Constant</td>
<td>1.9M SF +7%</td>
</tr>
<tr>
<td>Projection 2: Supportable Inventory Growth Based on Job Growth</td>
<td></td>
</tr>
<tr>
<td>Projection 3: Current Weighted Pipeline (50% Proposed, 100% Under Construction)</td>
<td></td>
</tr>
</tbody>
</table>

Source: CoStar, EMSI, HR&A
Office | The Office Pipeline Size Implies Higher-Than-Projected Job Growth

For developers to fill pipeline office space, **office-using jobs in Tysons need to grow at 2.4 times the projected growth of 7,500 jobs**. A hypothetical increase of 18,200 jobs associated with the development pipeline would require Tysons to capture 12% of all new office-using jobs in the MSA through 2030, compared to its actual share of 4% from 2010 to 2020.

**Job Growth Projection**

<table>
<thead>
<tr>
<th>7,500</th>
<th>×</th>
<th>250</th>
<th>=</th>
<th>1.9M SF</th>
</tr>
</thead>
<tbody>
<tr>
<td>EMSI-projected growth in office-using jobs</td>
<td></td>
<td>Weighted average square feet per worker</td>
<td></td>
<td>Projected total inventory growth</td>
</tr>
</tbody>
</table>

**Pipeline Projection**

<table>
<thead>
<tr>
<th>4.5M SF</th>
<th>÷</th>
<th>250</th>
<th>=</th>
<th>18,200</th>
</tr>
</thead>
<tbody>
<tr>
<td>Projected inventory growth assuming 100% of projects in construction and 50% of proposed projects are completed</td>
<td></td>
<td>Weighted average square feet per worker</td>
<td></td>
<td>Implied office-using job growth</td>
</tr>
</tbody>
</table>

*Source: CoStar, EMSI, HR&A*
Newmark Knight Frank showcased **three notable sale or lease transactions in Tysons in 2020**. In Northern Virginia, **Reston claimed the most transactions** with 6, followed by Tysons, Herndon, Rosslyn, Route 28 South, and Merrifield with 3. Five other localities accounted for a total of 6 transactions.

**Office | Tysons’ Transaction Activity in 2020 Was on Par with Regional Average**

**Convene**
75K SF  
2020 Q1

**John Marshall II Bldg.**
236K SF ($241/SF)  
2020 Q2

**GSA**
68K SF  
2020 Q3

**Source: Newmark Knight Frank**
The average parking ratio in office buildings has decreased by 35% for buildings built in 2015 and after as compared to those built between 2000 and 2014. There were 60,200 parking spaces in office buildings in Tysons as of mid-2020.

Average Parking Ratio for Office Buildings Built in a Specific Period

<table>
<thead>
<tr>
<th></th>
<th>2015-Present</th>
<th>2000-2014</th>
<th>Pre-1999</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of buildings with parking data</td>
<td>7</td>
<td>16</td>
<td>123</td>
</tr>
<tr>
<td>Parking spaces, 2015</td>
<td>56,600</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Parking spaces in office buildings, 2015 (52% of total)</td>
<td>110,000</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: CoStar, Fairfax County Comprehensive Plan, 2017 Edition (Tysons Urban Center)
The COVID-19 pandemic has slowed the office market in Tysons, reducing the number and size of deals and leading landlords and developers to focus on mitigating adverse effects to their business and retaining existing tenants. Market fundamentals have also weakened. Long-term trends remain uncertain, with a number of drivers potentially affecting office demand and supply into 2021 and beyond.

**Office | Market Fundamentals Have Weakened Due to COVID-19**

**2020 YTD vs. 2020 Q1**

<table>
<thead>
<tr>
<th></th>
<th>2020 YTD</th>
<th>2020 Q1</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Vacancy</strong></td>
<td>+5%</td>
<td></td>
</tr>
<tr>
<td><strong>Gross Rents</strong></td>
<td>-2%</td>
<td></td>
</tr>
</tbody>
</table>

Vacancy and Gross Rents During the COVID-19 Pandemic

- **Vacancy**
  - Start of COVID-19: 16.7%
  - 2020 Q1: 16.7%
  - 2020 Q2: 16.1%
  - 2020 Q3: 16.9%
  - 2020 Q4: 16.9%

- **Gross Rents**
  - Start of COVID-19: $35.16
  - 2020 Q1: $36.04
  - 2020 Q2: $35.34
  - 2020 Q3: $35.00
  - 2020 Q4: $35.50

**Source:** CoStar. Note: Quarter to date (QTD) as of early October 2020.
While leasing activity had been declining in 2019, it has plummeted in 2020 with only 28 deals in each of Q2 and Q3. Based on an Avison Young report, rental concessions in D.C. are at a historical high (both tenant improvement allowances and months of free rent). D.C. office investment sales activity in 2020 may only total 20% of 2019’s sum.

Source: CoStar, Avison Young. Note: Quarter to date (QTD) as of early October 2020.
Office rent Collections Have Remained Strong During the Pandemic

The office and multifamily sectors remained stable above 90% rent collections. Retail continues to lag other sectors.

Source: Nareit survey of rent collections by sector
Although occupancy and travel to workplaces have partially recovered since April, data suggests that between 40% and 75% of workers are absent, impacting office usage and worker retail and F&B activity.
Tysons’ hotel rooms, which cluster in the **Luxury and Upscale classes (88%)**, are considered “working” hotels as they cater to business travelers.

<table>
<thead>
<tr>
<th>Room Type by Location</th>
<th>Economy</th>
<th>Midscale/Upper Midscale</th>
<th>Upscale/Upper Upscale</th>
<th>Luxury</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tysons</td>
<td>13%</td>
<td>5%</td>
<td>4%</td>
<td>75%</td>
</tr>
<tr>
<td>Crystal City and Rosslyn</td>
<td>8%</td>
<td>5%</td>
<td>26%</td>
<td>83%</td>
</tr>
<tr>
<td>Washington, D.C., MSA</td>
<td>3%</td>
<td>12%</td>
<td>7%</td>
<td>62%</td>
</tr>
</tbody>
</table>

*Source: Kalibri Labs. Note: Based on hotels reporting data in May 2020.*
The average construction year for hotels in Tysons was 1987. No new hotel has been built since the Hilton Garden Inn in 2006. The closure of a 450-room Sheraton in Tysons West earlier this year reduced inventory by over 10%. There are 1,500 hotel workers in Tysons.

Source: Kalibri Labs. Note: Based on hotels reporting data in May 2020.
Two new hotels under construction will **add supply in the East Side Planning District**. The Archer is a boutique hotel in the Scotts Run project developed by LodgeWorks. The Watermark, on the Capital One campus, was developed by the bank to serve its employees and will be managed by B.F. Saul.

**Archer**
- 178 rooms
- Summer 2021

**Watermark**
- 300 rooms
- Fall 2021
Tysons’ hotel supply outpaced growth in the D.C. MSA. Tysons’ rapid supply growth accounts for part of why its occupancy lags that of Crystal City/Rosslyn and the MSA.

### Change (2015-2019)

<table>
<thead>
<tr>
<th></th>
<th>Supply 2019 Room-Nights</th>
<th>Occupancy In Percentage Points</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tysons</td>
<td>+11.2%</td>
<td>-2.6</td>
</tr>
<tr>
<td>Crystal City and Rosslyn</td>
<td>+2.3%</td>
<td>-3.4</td>
</tr>
<tr>
<td>Washington, D.C., MSA</td>
<td>+7.7%</td>
<td>=</td>
</tr>
</tbody>
</table>

### Occupancy (2015-2019)

- Tysons: 76%
- Crystal City and Rosslyn: 73%
- Washington, D.C., MSA: 71%

*Source: Kalibri Labs*
Prior to COVID-19, total available rooms (supply) increased 11.2% between 2015 and 2019, while occupancy (the rate of rooms sold to available rooms) decreased only 2.6 percentage points. This reflects growing hotel demand despite decreases in overall occupancy.

Source: Kalibri Labs. Note: Occupancy declined in 2020 due to COVID-19; there was no impact in 2019.
Tysons’ average daily rates (ADR) increased by more than Crystal City and Rosslyn and the MSA, displaying constant growth over the period and overtaking the MSA's.

**Change (2015-2019)**

- **+9%**
  - Tysons

- **+8%**
  - Crystal City and Rosslyn

- **+6%**
  - Washington, D.C., MSA

**Hotel-Collected ADR (2015-2019)**

- Tysons
- Crystal City and Rosslyn
- Washington, D.C., MSA

*Source: Kalibri Labs*
Revenue per available room (RevPAR) **increased in all three geographies** driven by greater increases in ADR than occupancy declined. Tysons’ average RevPAR between 2015 and 2019 was 12% lower than Crystal City and Rosslyn’s and 4% lower than the MSA’s.

### Change (2015-2019)

- **+5%**
  - Tysons
- **+3%**
  - Crystal City and Rosslyn
- **+6%**
  - Washington, D.C., MSA


- **Tysons**
- **Crystal City and Rosslyn**
- **Washington, D.C., MSA**

**Source:** Kalibri Labs. Note: RevPAR is the product of occupancy and ADR.
Hotel | Corporate and Group Customers Account for Half of Room Revenue

Between 2015 and 2019, business customers drove more than a third of Tysons’ hotel revenue, more than twice the average in the other two geographies. Crystal City and Rosslyn had the largest share of Government customers. Group revenue, which includes both business and leisure travelers, was a third lower in Tysons.


<table>
<thead>
<tr>
<th>Segment</th>
<th>Tysons</th>
<th>Crystal City and Rosslyn</th>
<th>Washington, D.C., MSA</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business Travel</td>
<td>19%</td>
<td>28%</td>
<td>30%</td>
</tr>
<tr>
<td>Government Travel</td>
<td>37%</td>
<td>41%</td>
<td>47%</td>
</tr>
<tr>
<td>Leisure Travel</td>
<td>7%</td>
<td>17%</td>
<td>8%</td>
</tr>
<tr>
<td>Group</td>
<td>37%</td>
<td>13%</td>
<td>15%</td>
</tr>
</tbody>
</table>

Source: Kalibri Labs. Note: Shares are average of 2015-2019 contributions.
Hotel | Personal Travel Drives Most Household Trips to Northern Virginia

Half of surveyed visitors to northern Virginia reported visiting family and friends as the primary reason for their travel. Reasons for travel were similar for visitors to the region and to the state. The former traveled for more nights and spent more in total, though their spending per night was $177 and $238, respectively. The data is based on a household survey, which weights leisure over business travel.

<table>
<thead>
<tr>
<th></th>
<th>Avg. Trip Spend</th>
<th>Avg. Nights</th>
</tr>
</thead>
<tbody>
<tr>
<td>Northern Virginia</td>
<td>$654</td>
<td>3.7</td>
</tr>
<tr>
<td>Virginia</td>
<td>$571</td>
<td>2.4</td>
</tr>
</tbody>
</table>

Source: Virginia Tourism Corporation, Travel Profile Survey (via TravelTrakAmerica), 2019. Note: Northern VA includes Alexandria City, Arlington, Caroline, Culpeper, Fairfax, Fairfax City, Falls Church City, Fauquier, Fredericksburg City, Loudoun, Manassas City, Manassas Park City, Prince William, Rappahannock, Spotsylvania, and Stafford.
Tysons Partnership Market Study

Hotel | Tysons is Located a Short Distance From Key Attractions

Tysons is centrally located between major airports and sites of national and regional significance. It offers a broad range of attractions for business and leisure travelers within a 40-minute driving radius.

Representative Sites

- Historical Sites and Museums
- Parks and Gardens
- Festivals, Fairs, and Conferences
- Fine Dining and Wineries
- Shopping
Hotel | Travel to the D.C. Area Peaks in the Spring and October

Hotel-collected RevPAR in Tysons peaks between April and June as students, tourists, and business travelers converge on D.C. and in October, a peak month for corporate travel and trainings and the start of the federal government’s fiscal year.

RevPAR By Month and Year (2017-2020 YTD)

Source: Kalibri Labs
Hotel | COVID-19 Has Cut Hotel Revenue By More Than Two-Thirds

Tysons’ total RevPAR in the first 9 months of 2020 declined less than that of the other two geographies. COVID-19 caused a steep decline that reached -93% in March. The three geographies performed comparably, recovering slightly by August before declining again in September. Overall hotel revenue losses have been higher due to the additional loss of income from F&B and other services.

<table>
<thead>
<tr>
<th>2020 YTD vs. 2019 YTD</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tysons</td>
</tr>
<tr>
<td>-64%</td>
</tr>
<tr>
<td>Crystal City and Rosslyn</td>
</tr>
<tr>
<td>-71%</td>
</tr>
<tr>
<td>Washington, D.C., MSA</td>
</tr>
<tr>
<td>-67%</td>
</tr>
</tbody>
</table>

Change in 2020 RevPAR Compared To 2015-2019 Average

Source: Kalibri Labs, interviews with local experts
Hotel | Forecasts Estimate a Hotel Market Recovery Will Come in 2025

Kalibri Labs forecasts a nearly two-thirds decline in RevPAR for the D.C. market for 2020 as compared to 2019. It expects the market to recover only in 2025, one year later than the national average. The D.C. market’s reliance on Group travel means that recovery will depend on the pace at which Group and convention travel resume.

**Forecast**

-65%

RevPAR, 2020 vs. 2019

2025

Expected return to 2019 levels

*Source: Kalibri Labs. Note: Kalibri Labs defines the D.C. market (98,300 rooms) differently than the MSA, which HR&A’s analysis uses (88,000 rooms).*
While some market segments will begin to recover in 2021, forecasts envision only **gradual growth throughout the year with continued weakness** in the historically strong Q2 period. Real growth is expected in late 2021 and early 2022, with **recovery occurring no earlier than 2023**.

- **Key drivers.** The hotel market’s recovery in Tysons and the MSA will depend primarily on the return of high office occupancy and commensurate business travel. This will depend on public health dynamics, company policies, and local resident acceptance of a return of travelers. Other drivers will be reopening of conference and sports facilities, universities, and international airline capacity.

### Recovery by Segment

<table>
<thead>
<tr>
<th>2021 Q1</th>
<th>Q2</th>
<th>Q3</th>
<th>Q4</th>
<th>2022</th>
</tr>
</thead>
<tbody>
<tr>
<td>Domestic leisure</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Corporate</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Government</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>International leisure</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Conventions and conferences</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Students</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

2021 forecast: 65% of 2019 revenue (+31% YoY vs. 2020)

*Source: Interviews with local experts*
RESIDENTIAL
Since 2010, the total housing stock in Tysons has increased 34%, driven by mid- and high-rise development.

### Residential | Total Housing Units

<table>
<thead>
<tr>
<th>Year</th>
<th>Single Family</th>
<th>Townhouse</th>
<th>Low-Rise</th>
<th>Mid-Rise</th>
<th>High-Rise</th>
</tr>
</thead>
<tbody>
<tr>
<td>2010</td>
<td>1.5K</td>
<td>1.1K</td>
<td>1.5K</td>
<td>1.1K</td>
<td>1.1K</td>
</tr>
<tr>
<td>2011</td>
<td>1.5K</td>
<td>1.1K</td>
<td>1.5K</td>
<td>1.1K</td>
<td>1.1K</td>
</tr>
<tr>
<td>2012</td>
<td>1.5K</td>
<td>1.1K</td>
<td>1.5K</td>
<td>1.1K</td>
<td>1.1K</td>
</tr>
<tr>
<td>2013</td>
<td>1.5K</td>
<td>1.1K</td>
<td>1.5K</td>
<td>1.1K</td>
<td>1.1K</td>
</tr>
<tr>
<td>2014</td>
<td>1.5K</td>
<td>1.1K</td>
<td>1.5K</td>
<td>1.1K</td>
<td>1.1K</td>
</tr>
<tr>
<td>2015</td>
<td>1.5K</td>
<td>1.1K</td>
<td>1.5K</td>
<td>1.1K</td>
<td>1.1K</td>
</tr>
<tr>
<td>2016</td>
<td>1.5K</td>
<td>1.1K</td>
<td>1.5K</td>
<td>1.1K</td>
<td>1.1K</td>
</tr>
<tr>
<td>2017</td>
<td>1.5K</td>
<td>1.1K</td>
<td>1.5K</td>
<td>1.1K</td>
<td>1.1K</td>
</tr>
<tr>
<td>2018</td>
<td>1.5K</td>
<td>1.1K</td>
<td>1.5K</td>
<td>1.1K</td>
<td>1.1K</td>
</tr>
<tr>
<td>2019</td>
<td>1.5K</td>
<td>1.1K</td>
<td>1.5K</td>
<td>1.1K</td>
<td>1.1K</td>
</tr>
</tbody>
</table>

Total Housing Units by Type 2010-2019

Source: HR&A analysis of Fairfax County open geospatial data
High-density residential is concentrated in the Tysons core, while low-density inventory surrounds the periphery. The North Central and East Side Planning districts accommodate the most residential stock.

2019 Total Housing Inventory by Planning District*

*Excludes pipeline development

Source: HR&A analysis of Fairfax County open geospatial data
Total housing units are **expected to grow 36% by 2025 to nearly 19k units**, with significant deliveries expected between 2023 and 2025. The accuracy of County projections derives from a comprehensive analysis of tax records, permit/rezoning applications, and planned use data.

### Forecasted Housing Units 2020-2025

**19K**

2025 Projected Housing Units

**36%**

Projected Growth by 2025

<table>
<thead>
<tr>
<th>Year</th>
<th>2019 Units</th>
<th>Projected</th>
</tr>
</thead>
<tbody>
<tr>
<td>2020</td>
<td>13.9K</td>
<td></td>
</tr>
<tr>
<td>2021</td>
<td>14.5K</td>
<td></td>
</tr>
<tr>
<td>2022</td>
<td>16.0K</td>
<td></td>
</tr>
<tr>
<td>2023</td>
<td>17.0K</td>
<td></td>
</tr>
<tr>
<td>2024</td>
<td>18.2K</td>
<td></td>
</tr>
<tr>
<td>2025</td>
<td>18.9K</td>
<td></td>
</tr>
</tbody>
</table>

Source: HR&A analysis of Fairfax County open geospatial data
Over the past decade, Tysons has experienced dramatically **higher rental apartment growth** on a percentage basis than its peers and the DC metro area – though with **less total inventory**.

**Rental Apartments | Peer Comparison: Inventory**

10-Year Inventory Growth Rate

- **Fairfax County**: 22% growth with 86K units
- **DC MSA**: 23% growth with 627K units
- **Arlington County**: 23% growth with 58K units
- **Bellevue**: 26% growth with 22K units
- **Buckhead**: 56% growth with 30K units
- **Stamford**: 67% growth with 16K units
- **Tysons**: 151% growth with 7.2K units

*Source: CoStar*
Tysons has **significantly fewer rental apartment units per job** than the DC metro area or its peers – suggesting the **potential to continue developing additional rental housing** in the years to come.
Multifamily rental **vacancy in Tysons surged in 2014** following a large supply of new units delivered. While vacancy has dropped since then, it remains above the metro area and most of its peers.

*Source: CoStar. Note: Year to date (YTD) as of early October 2020; Fairfax County includes Fairfax City*
Over the past 20 years, Tysons’ multifamily rental units have consistently commanded **higher rents per square foot** than the DC metro area average and most peers.
Effective rent concessions **more than doubled** from previous levels in 2014 as thousands of new rental units came on the market, and concessions have remained elevated since then at around 2%. **Concessions spiked again in 2020** to 2.8%, likely as a result of COVID-19.

Source: CoStar

Note: Year to date (YTD) as of August 2020;
Most multifamily rental square footage in Tysons is in buildings **under 8 stories or high-rises above 15 stories**.

### Multifamily SF by Building Height

- **<8 Stories**
  - Adaire
    - Completed 2016
    - 34 stories
    - 400 units
    - 320,000 SF
  - Highgate
    - Completed 2017
    - 7 stories
    - 395 units
    - 320,000 SF

### Source: CoStar

*Note: Year to date (YTD) as of August 2020;*
Most condos developed in Tysons were built prior to 2000 – though several new condo buildings have been planned* and completed in recent years.

*There is currently approximately 1.9M square feet (~1,550 units) of total planned residential development in Tysons.

**Verse (at The Boro)**
Completed 2019
25 stories
140 units
$500K-$2.8M

**The Bexley**
Completed 2020
5 stories
112 units
$725K-$1.2M+

**Monarch**
Construction Paused
20 stories
102 units
$600K-$3M+

Source: HR&A research, HR&A analysis of Redfin data sourced from MLS, Tysons Partnership
Condominiums | Market Trends

Condo sales prices per square foot have **grown 4% per year** since 2016, reflecting a strong market for for-sale residential units in Tysons. This growth has continued in 2020, despite lower sales volume resulting from COVID-19.

Source: HR&A analysis of Redfin data sourced from MLS
Note: Year to date (YTD) as of November 2020
The COVID-19 pandemic has caused multifamily rents to decline in Tysons, though vacancy has also declined slightly at the same time. Tysons market dynamics have likely been affected by the national eviction moratorium enacted by the CDC on September 4, 2020, though the exact impact is unclear. It is reasonable to assume that rents will continue to be tied to the broader economic recovery.

Source: CoStar. Note: Quarter to date (QTD) as of early October 2020.
Travel patterns confirm a higher portion of time is being spent in residences during the pandemic, especially early in the year, with Fairfax County seeing more time spent at home than Virginia as a whole.

Source: Google COVID-19 Community Mobility Data (Travel), 2020
Nationally, single-family home price growth has seen a notable spike in 2020 above growth for condo and co-op units as COVID-19 has driven higher demand for housing in less dense, suburban areas.
TRANSPORTATION
DATA ANALYSIS
Transportation | Key Goals

The Fairfax County Comprehensive Plan for the Tysons area envisions a transformed 24-hour urban center by 2050, where people live, work, and play. Increased mobility options and shifting away from over reliance on auto-centric transportation infrastructure is one of the key initiatives that will help Tysons reach this goal.

To assess where Tysons is headed, this study focuses on three key questions:

1. How walkable is Tysons?
2. How transit accessible is Tysons?
3. How bikeable is Tysons?
**Transportation | Comprehensive Plan**

The Fairfax County Comprehensive Plan for the Tysons area envisions Tysons will be transformed into a walkable, green urban center by 2050.

In order to get there, $2.8 billion in transportation infrastructure improvements are planned with the goal of creating a well balanced, multi-modal network that will meet the needs of all users, from transit users, bicyclists, pedestrians, and drivers.

**Key Initiatives:**

- **Silver Line expansion** to Dulles and Loudoun County
- Improved Local and Express **Bus Service**
- **Expanding the street grid** and breaking up “super blocks” with pedestrian connections
- Complete street design incorporating pedestrian amenities and bicycle infrastructure
- Expanding the network of connected and projected **bike lanes**
- Transit Oriented Development and Multi-modal **transportation hubs**
- **Transportation Demand Management** focusing on strategies to get people out of single-occupancy vehicles

*Source: Fairfax County, Tysons Partnership*
American Community Survey data shows the percent of people living in Tysons who drive alone to work has decreased almost every year since 2010. After the Silver line stations opened, there is a noticeable uptick in the percentage of Tysons Residents using MetroRail from 5.6% in 2013 to 9% in 2015. Metro ridership has continued to grow, while bus ridership has declined. Telework also was increasing, even before the COVID-19 pandemic.

<table>
<thead>
<tr>
<th>Year</th>
<th>Drove Alone</th>
<th>Public Transportation</th>
<th>Bike, Walk, Taxi, Other</th>
<th>Carpool</th>
<th>Worked at Home</th>
</tr>
</thead>
<tbody>
<tr>
<td>2010</td>
<td>75%</td>
<td>6%</td>
<td>5%</td>
<td>5%</td>
<td>5%</td>
</tr>
<tr>
<td>2011</td>
<td>75%</td>
<td>10%</td>
<td>6%</td>
<td>5%</td>
<td>5%</td>
</tr>
<tr>
<td>2012</td>
<td>74%</td>
<td>9%</td>
<td>8%</td>
<td>5%</td>
<td>5%</td>
</tr>
<tr>
<td>2013</td>
<td>74%</td>
<td>8%</td>
<td>9%</td>
<td>11%</td>
<td>5%</td>
</tr>
<tr>
<td>2014</td>
<td>71%</td>
<td>7%</td>
<td>13%</td>
<td>13%</td>
<td>5%</td>
</tr>
<tr>
<td>2015</td>
<td>71%</td>
<td>6%</td>
<td>13%</td>
<td>13%</td>
<td>5%</td>
</tr>
<tr>
<td>2016</td>
<td>71%</td>
<td>6%</td>
<td>13%</td>
<td>13%</td>
<td>5%</td>
</tr>
<tr>
<td>2018</td>
<td>70%</td>
<td>7%</td>
<td>13%</td>
<td>13%</td>
<td>5%</td>
</tr>
</tbody>
</table>

Source: ACS, Census Bureau
American Community Survey data shows the percent of people living in Tysons who drive alone to work is **comparable to peers** such as Reston and Paramus New Jersey. Locations in the region such as Bethesda, Arlington, and Washington, DC have a much lower share of residents who drive alone to work.
American Community Survey data shows the percent of people working in Tysons who drive alone to work has decreased almost every year since 2010, but the share of employees driving alone versus residents is much higher. People who reported carpooling ticked up dramatically in 2018, potentially due to the addition of HOT Lanes on I-66, instituted in December 2017.
### Transportation | Commuting Mode – Residential vs Workers

American Community Survey data shows the percent of people living or working in Tysons who drive alone to work has **decreased almost every year since 2010**, but the **rate of decrease in driving alone by residents** is more than **double that of employees** over that same period.

<table>
<thead>
<tr>
<th>Year</th>
<th>Residents</th>
<th>Workers</th>
</tr>
</thead>
<tbody>
<tr>
<td>2010</td>
<td>75%</td>
<td>86%</td>
</tr>
<tr>
<td>2011</td>
<td>75%</td>
<td>87%</td>
</tr>
<tr>
<td>2012</td>
<td>74%</td>
<td>85%</td>
</tr>
<tr>
<td>2013</td>
<td>74%</td>
<td>86%</td>
</tr>
<tr>
<td>2014</td>
<td>71%</td>
<td>88%</td>
</tr>
<tr>
<td>2015</td>
<td>71%</td>
<td>86%</td>
</tr>
<tr>
<td>2016</td>
<td>71%</td>
<td>86%</td>
</tr>
<tr>
<td>2018</td>
<td>70%</td>
<td>83%</td>
</tr>
</tbody>
</table>

*Silver Line opens in July 2014*

*Source: ACS, Census Bureau*
American Community Survey data shows the percent of people working in Tysons who drive alone to work compares similarly to Reston and Paramus, New Jersey. Not surprisingly, more urban locations like Washington, DC have a much lower share of people driving alone to work.

Source: ACS, Census Bureau
Transportation | Commuting Mode – Workers, Arlington Over Time

American Community Survey (ACS) data shows the percent of people working in Tysons who drive alone to work is currently much lower than in Arlington, VA. Comparable ACS data does not exist prior to 2000. Given the lack of information available before 2000 we cannot easily draw a connection between the mode split Tysons of today with that of Arlington of the 1980s or 1990s.
Tysons is a regional employment draw with people commuting from all around the region. The map to the right and chart below show the top locations where people are commuting from in the DC Metro Area.

Most commuters coming from outside of Tysons come from points west like Reston and Loudoun County, with significant numbers also commuting from Arlington and DC. The average commute distance for commuters to Tysons is 26.9 miles.

Top 10 Home ZIP Codes - Commuters to Tysons

* As a point of reference, the average commute distance for Washington, DC is 39.1 miles. Source: https://www.answerfinancial.com/insurance-center/which-states-have-the-longest-commute/

Source: Census Bureau LEHD LODES

**Transportation | Commuting – Origin and Destination Locations**
Transportation | Commuting – Origin and Destination Locations

Many people who live in Tysons also work in Tysons, but there is a significant population of residents who commute to locations further west towards Dulles, and into Washington, DC and points east. Compared to commuters coming to Tysons, the distances people travel are much shorter. The average commute distance for people living in Tysons is **19.2 miles**.

Top 10 Work ZIP Codes - Commuters From Tysons

Source: Census Bureau LEHD LODES
The COVID-19 Pandemic has altered formerly routine, daily behaviors including significantly impacting the daily commute. Using mobility data from Mapbox, we can examine a baseline level of mobility and track how this is changing over time. Compared to January 2020, Tysons reached a low in April of **only 56% the level of movement**. As of August 2020, the Tysons area had returned to **66%** of the January baseline.

**Source: Mapbox, Fairfax County**
Walk Score measures the walkability of a specific address, giving a snapshot of how easy it is to access nearby amenities and points of interest on foot. Locations are categorized on a scale of 0 – 100, and broken into categories including Car-dependent, Somewhat Walkable, Very Walkable, and Walker’s Paradise. In Tysons, all properties are in one of the following categories:

- **0-25: Car-Dependent.** Almost all errands require a car.
- **25-49: Car-Dependent.** Most errands require a car.
- **50-69: Somewhat Walkable.** Some errands can be accomplished on foot.
- **70-89: Very Walkable.** Most errands can be accomplished on foot.

**Source:** Walkscore.com, Fairfax County
Tysons Average Walk Score: **54.07**

Tysons aims to become a walkable, urban center by encouraging transit-oriented development around the four metro stations and improving the pedestrian experience through infrastructure improvements.

Currently, areas near the Greensboro Metro Station in **Tysons Central 7 are the most walkable** according to Walk Score and Tysons East and East Side near the Mclean Metro station are the least walkable.

% of Tysons Addresses by Walk Score Category

<table>
<thead>
<tr>
<th>Walk Score Category</th>
<th>% of Addresses</th>
</tr>
</thead>
<tbody>
<tr>
<td>0 (Car Dependent)</td>
<td>3%</td>
</tr>
<tr>
<td>25 - 49 (Car-Dependent)</td>
<td>35%</td>
</tr>
<tr>
<td>50 - 69 (Somewhat Walkable)</td>
<td>46%</td>
</tr>
<tr>
<td>70 - 89 (Very Walkable)</td>
<td>17%</td>
</tr>
</tbody>
</table>

Source: Walkscore.com, Fairfax County
Walkability varies across space in Tysons and this is reflected in the Walk Score values when land use categories are pulled out.

**Residential** addresses are more often in the peripheries of Tysons, and as such are more likely to be in car-dependent or very car-dependent locations. **Commercial properties** on the other hand, are much more likely to be somewhat walkable and very walkable locations. This is likely the effect of placing office and retail development in close proximity of each other and in transit-oriented developments near metro stations.

*Source: Walkscore.com, Fairfax County*
Tysons Walk Score of 54 puts it in the *somewhat walkable* category, defined as the ability to complete at least some errands on foot. While not as walkable as more urban peers like Downtown DC, **Tysons compares favorably to other national edge cities** like Paramus, New Jersey that feature a similar mix of land uses. Tysons also compares favorably to regional peers like Reston and Bethesda, but is still less walkable than close in suburbs like the Crystal City Neighborhood in Arlington County.

![Peer Comparison: Walk Score](chart_image)

Source: Walkscore.com
Well maintained, wide sidewalks are essential for pedestrian movement throughout and area. While there are many public sidewalks throughout Tysons, **many sidewalks do not directly connect areas** via the most direct route.

Additionally, many sidewalks are on long blocks with **crosswalks only at intersections**. The lack of intersections and mid-block crossings can cause dangerous situations where pedestrians will still attempt to cross, looking for the most convenient route.

Breaking up the big blocks with midblock crossings and ensuring that all intersections have marked crosswalks will greatly **improve pedestrian safety and encourage walking** as a primary mode of transportation.

*Source: Walkscore.com*
Tysons is served by Public Transportation in the form of bus and rail service provided by 3 direct providers: WMATA, Fairfax County (Fairfax Connector), and Potomac and Rappahannock Transportation Commission (OmniRide).

- **Metrorail**
  - 1 Line
  - 4 Stations
- **Metrobus**
  - 3 Routes
  - 12 Stops
- **Fairfax Connector**
  - 106 Stops
  - 15 Routes
- **OMNI Ride**
  - 17 Stops
  - 3 Routes

Source: WMATA, Fairfax Connector, OmniRide
Transit Score measures the how well a location is served by public transit, giving a snapshot of how easy it is to access nearby amenities and points of interest by public transportation. Locations are categorized on a scale of 0 – 100, and broken into categories including Minimal Transit, Some Transit, Good Transit, and Excellent Transit, and Rider’s Paradise. In Tysons, all properties are in one of the following categories:

25-49: Some Transit
A few nearby public transportation options.

50-69: Good Transit
Many nearby public transportation options.

Source: Walkscore.com, Fairfax County
Tysons Average Transit Score: **53**

All addresses in Tysons currently range from *some transit* to *good transit* categories, indicating at least bus service for the entire area. **The defining event for Tysons was the opening of the Silver Line stations** bringing Metrorail to the area. To that, areas in Tysons Central 7 and Tysons Central 123 near Greensboro and Tysons Station are the best served by Transit while far eastern Tysons is among the worst served areas.

% of Tysons Addresses by Transit Score Category

- **34%** Some Transit (25 - 49)
- **66%** Good Transit (50 - 69)

*Source: Walkscore.com, Fairfax County*
Transit Accessibility varies across space in Tysons and this is reflected in the Transit Score values when land use categories are pulled out.

**Residential** addresses are more often in the peripheries of Tysons, and as such are more likely to be **further away from high quality transit options**.

**Commercial properties**, on the other hand, have been concentrated in the transit-oriented development areas centered around the four metro stops. This gives office and retail employees **better access to transit amenities** compared to residents in Tysons as a whole.

*Source: Walkscore.com, Fairfax County*
Tysons Walk Score of 46 puts it in the *some transit* category, defined as a few nearby public transportation options. While metro has four stations in Tysons and there is bus coverage from several providers, all areas of Tysons are not equally served by public transportation or may be a longer walk from the high-capacity stations. Compared to more urban peers like Downtown DC, Tysons lacks the sheer amount of transit options but compares favorably to other national edge cities like Paramus, New Jersey that feature a similar mix of land uses. Tysons also compares favorably to regional peers like Reston and Bethesda.
The Silver Line opened in 2014 with four stations in Tysons: McLean, Tysons Corner Station, Greensboro, and Spring Hill. Overall ridership has grown year over year every year since the line debuted at each station from 2014 – 2019. Ridership for the first 2.5 months of 2020 was on track to continue growing, but dropped significantly due to the COVID-19 pandemic. After closing for repairs in Summer 2020, ridership in August began to rise again.
Tysons is **well served by bus** service from several providers including Fairfax County's Fairfax Connector for local service, and WMATA's Metrobus and the Potomac and Rappahannock Transportation Commission's Omni Ride for longer distance commuting. Loudoun County Transit formerly served with the area, but rerouted service to the Wiehle Reston Metro station as ridership declined after the opening of the Silver Line. Bus Ridership **peaked in 2016 and has declined every year since.**
Transportation | Transit Accessibility

Combining bus and metrorail coverage, **Tysons is well connected to major destinations** in Northern Virginia and Downtown DC. Leaving any bus or rail transit stop, a passenger could get to other major Fairfax destinations like Vienna or Merrifield within 10 minutes, locations like Wiehle Reston or Clarendon within 15 minutes or Downtown DC or Crystal City within 30 Minutes.
Transportation | Metro Station Walksheds

A walkshed is an area where the outer boundary represents how far on average an individual will be able to get by walking, usually measured in either time or distance. For example, the majority of Tysons can be reached within a 15-minute walk, depending on which Metro Station a person uses. Half a mile, or around 10 minutes, is typically the furthest someone will walk to access a transit station, but people are often willing to walk further for rail transit compared to bus stops.

Population within Walking Distance to Metro Stations

<table>
<thead>
<tr>
<th></th>
<th>5 Minutes</th>
<th>10 Minutes</th>
<th>15 Minutes</th>
</tr>
</thead>
<tbody>
<tr>
<td>2015</td>
<td>2K</td>
<td>7K</td>
<td>15K</td>
</tr>
<tr>
<td>2020</td>
<td>4K</td>
<td>11K</td>
<td>20K</td>
</tr>
<tr>
<td>2025</td>
<td>10K</td>
<td>26K</td>
<td>38K</td>
</tr>
<tr>
<td>2030</td>
<td>12K</td>
<td>33K</td>
<td>48K</td>
</tr>
</tbody>
</table>

Source: MWCOG, WMATA, Mapbox

Jobs within Walking Distance to Metro Stations

<table>
<thead>
<tr>
<th></th>
<th>5 Minutes</th>
<th>10 Minutes</th>
<th>15 Minutes</th>
</tr>
</thead>
<tbody>
<tr>
<td>2015</td>
<td>14K</td>
<td>49K</td>
<td>71K</td>
</tr>
<tr>
<td>2020</td>
<td>16K</td>
<td>54K</td>
<td>77K</td>
</tr>
<tr>
<td>2025</td>
<td>20K</td>
<td>61K</td>
<td>84K</td>
</tr>
<tr>
<td>2030</td>
<td>26K</td>
<td>74K</td>
<td>98K</td>
</tr>
</tbody>
</table>

Source: MWCOG, WMATA, Mapbox
Transportation | Metro Bus Walksheds

Metrobus stops are concentrated near Tysons Corner Center and East Tysons. Half a mile, or around 10 minutes, is typically the furthest someone will walk to access a transit station, but people are often less willing to walk for bus stops compared to rail stops.

Source: MWCOG, WMATA, Mapbox
Transportation | Fairfax Connector Walksheds

Fairfax Connector stops are found throughout Tysons, connecting Tysons to other areas in Fairfax County and circulating people to other locations within Tysons itself. Half a mile, or around 10 minutes, is typically the furthest someone will walk to access a transit station, but people are often less willing to walk for bus stops compared to rail stops.

Population Within Walking Distance to Fairfax Connector Stops

<table>
<thead>
<tr>
<th>Year</th>
<th>5 Minutes</th>
<th>10 Minutes</th>
</tr>
</thead>
<tbody>
<tr>
<td>2015</td>
<td>13K</td>
<td>20K</td>
</tr>
<tr>
<td>2020</td>
<td>17K</td>
<td>25K</td>
</tr>
<tr>
<td>2025</td>
<td>30K</td>
<td>44K</td>
</tr>
<tr>
<td>2030</td>
<td>38K</td>
<td>54K</td>
</tr>
</tbody>
</table>

Jobs Within Walking Distance to Fairfax Connector Stops

<table>
<thead>
<tr>
<th>Year</th>
<th>5 Minutes</th>
<th>10 Minutes</th>
</tr>
</thead>
<tbody>
<tr>
<td>2015</td>
<td>67K</td>
<td>82K</td>
</tr>
<tr>
<td>2020</td>
<td>71K</td>
<td>88K</td>
</tr>
<tr>
<td>2025</td>
<td>75K</td>
<td>95K</td>
</tr>
<tr>
<td>2030</td>
<td>84K</td>
<td>108K</td>
</tr>
</tbody>
</table>

Source: MWCOG, Fairfax County, Mapbox
Transportation | Omni Ride Walksheds

OmniRide stops connect Tysons to Woodbridge and Prince William County and are concentrated near Tysons Corner Center and north Tysons. Half a mile, or around 10 minutes, is typically the furthest someone will walk to access a transit station, but people are often less willing to walk for bus stops compared to rail stops.

Population Within Walking Distance to OmniRide Stops

Jobs Within Walking Distance to OmniRide Stops

Source: MWCOG, PRTC, Mapbox
**Transportation | Transit Frequency**

Frequency refers to the number of transit vehicles that visit a specific stop over a specific period. Higher frequency often equates to higher ridership, as higher frequency transit is more convenient for the rider and requires less planning if transit is guaranteed to arrive often. Many stops in Tysons could be considered high frequency during the week, with hundreds of trips a day, but service is greatly reduced on the weekends. On weekdays, there are **154 active transit stops in Tysons**, while on weekends there are only 113 active stops.
Transportation | Transit Headways

Transit headways are the amount of time between transit vehicles traveling in the same direction on the same route at a particular stop. **Lower headways can encourage higher ridership** as the amount of time someone will have to wait for the next bus or train will be lower. This can reduce the amount of planning required to take transit and increase its convenience. A higher percentage of transit stops have lower headways during the weekday in Tysons than on the weekend.

Source: WMATA, Fairfax Connector, OmniRide GTFS
**Transportation | Bikeability**

**Bike Score** measures the bikeability of a specific address, giving a snapshot of how easy it is to access nearby amenities and points of interest on by bike. Locations are categorized on a scale of 0 – 100, and broken into categories including somewhat bikeable, bikeable, very bikeable, and Biker’s Paradise. In Tysons, all properties are in one of the following categories:

- **0-49: Somewhat Bikeable.** Limited bike infrastructure.
- **50-69: Bikeable.** Some bike infrastructure.
- **70-89: Very Bikeable.** Biking is convenient for most trips.
- **Biker’s Paradise.** Excellent bike infrastructure for all needs.

*Source: Walkscore.com*
Tysons Average Bike Score: 49

Tysons’ disconnected bike infrastructure and busy arterial streets (Route 7, Route 123) create barriers for safe biking. Certain areas like Old Courthouse rank higher in bikeability due to the neighborhood streets with slower speed limits and a higher intersection density that make biking on streets even without explicit bike lanes more comfortable and safer.

% of Tysons Addresses by Bike Score Category

Source: Walkscore.com, Fairfax County
Bikeability **varies across space in Tysons** and this is reflected in the Bike Score values when land use categories are pulled out.

**Residential** addresses are more often in the peripheries of Tysons, and as such are more likely to be in **car-dependent** or very car-dependent locations.

**Commercial** properties on the other hand, are much more likely to be in denser areas near **better cycling infrastructure**.

Source: Walkscore.com, Fairfax County
Tysons Bike Score of 49 puts it in the somewhat bikeable category, defined as minimal bike infrastructure. While Tysons has some bike lanes on certain roads (Tycho Road, Westpark Drive) there is still work to be done to create a connected network. Compared to more urban peers like Downtown DC, Tysons lacks protected bike lanes and a denser street network more suitable for biking. Tysons compares favorably to other national edge cities like Paramus, New Jersey that feature a similar mix of land uses. Tysons compares marginally worse to regional peers like Reston and Bethesda.

Peer Comparison: Bike Score

<table>
<thead>
<tr>
<th>City</th>
<th>Bike Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>Paramus</td>
<td>38</td>
</tr>
<tr>
<td>Bellevue</td>
<td>44</td>
</tr>
<tr>
<td>Stamford</td>
<td>46</td>
</tr>
<tr>
<td>Tysons</td>
<td>49</td>
</tr>
<tr>
<td>Reston</td>
<td>54</td>
</tr>
<tr>
<td>Buckhead</td>
<td>54</td>
</tr>
<tr>
<td>Bethesda</td>
<td>56</td>
</tr>
<tr>
<td>Arlington (Crystal City)</td>
<td>84</td>
</tr>
<tr>
<td>Downtown DC</td>
<td>92</td>
</tr>
</tbody>
</table>

Source: Walkscore.com
Compared to Walkability or Transit Ridership/Coverage, Tysons struggles more with bikeability. **39% of road segments in Tysons are rated CAUTION** by the Fairfax County Department of Transportation. Areas of comparable bike friendliness are often isolated and do not necessarily connect neighborhoods or across busy intersections and streets like Route 7.

Source: Fairfax County Department of Transportation
Capital Bikeshare came to Tysons in 2016 with 9 stations and has grown to 14 stations. **Total ridership in that time has been 15,625 trips.**

![Bikeshare Ridership in Tysons](image)

**Average Annual Ridership per Tysons Station**

<table>
<thead>
<tr>
<th>Station</th>
<th>2016</th>
<th>2017</th>
<th>2018</th>
<th>2019</th>
<th>2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tysons Corner</td>
<td>214</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Park Run &amp; Onyx</td>
<td></td>
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<td></td>
<td></td>
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<tr>
<td>Westpark &amp; Onyx</td>
<td></td>
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<tr>
<td>Westpark One Pl.</td>
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<tr>
<td>Spring Hill</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>McLean Metro</td>
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<tr>
<td>Jones Branch Dr.</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Greensboro &amp; Westpark Dr. &amp;</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Towers &amp;</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Tysons West &amp; Greensboro &amp;</td>
<td></td>
<td></td>
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<td></td>
<td></td>
</tr>
</tbody>
</table>

*Source: Capital Bikeshare*
Capital Bikeshare came to Tysons in 2016 with 9 stations and has grown to 14 stations. **Total ridership in that time has been 15,625 trips.**

Source: Capital Bikeshare
While the vast majority of Bikeshare trips are to and from stations within Tysons some travel between places like Ballston and Dunn Loring.
The most popular paths between Capital Bikeshare stations can help planners understand **where improved bicycle infrastructure may have the most impact** as these are already corridors where people are biking.
The frequency of vehicle crashes is an important indicator for pedestrian and bicyclist safety. Crashes in Tysons and Fairfax County are on track to drop in 2020, largely due to decreased mobility during the pandemic.

Source: VDOT, VA DMV
The Virginia Department of Transportation gathers traffic data around the Commonwealth utilizing sensors along streets and highways and from other sources. Streets are broken into monitored segments and average traffic volumes are calculated for each segment. Annual Average Daily Traffic (AADT) is the total annual traffic estimate divided by the number of days in a year. I-495, and Route 7 are by far the busiest roads in the Tysons area.

**Composite AADT - Average of all Tysons Streets**


**Composite AADT - Major Streets in and out of Tysons**


*Source: VDOT*