Montgomery Village Master Plan

RESEARCH SUMMARY

December 2, 2014

Research Summary

DATA SOURCES AND GEOGRAPHIES

All data in this demographic analysis is from the U.S. Census Bureau's *2000 and 2010 Decennial Census* and *2008-2012 American Community Survey*. The exception is the forecast data, which was obtained from the *Round 8.3 COG Forecast* from the Metropolitan Washington Council of Governments. Since these three data sources do not collect, tabulate or report data in exactly the same way or over the same time period, there are some differences in their population and household totals.

DECENNIAL CENSUS DATA

The decennial census is a 100% count of a limited number of variables in 2000 and 2010. Census geographies may be revised every decade, so there is a slight geographic difference between the 2000 and 2010 MPA boundaries.

The boundaries of the Montgomery **Village Master Plan Area (MPA)** were closely approximated by aggregating block level 2000 and 2010 data. The 2010 boundaries align with the actual master plan boundaries, but a few 2000 Census blocks extend beyond the 2010/MPA aggregation.

MONTGOMERY VILLAGE **MASTER PLAN AREA**
2010 and 2000 Decennial U.S. Census boundaries
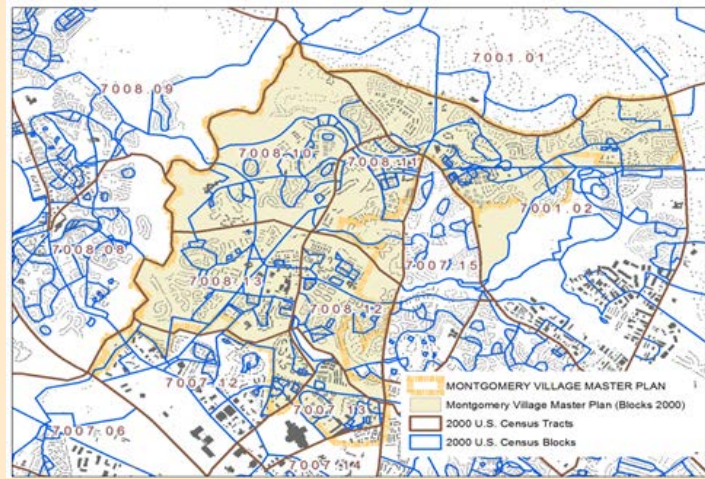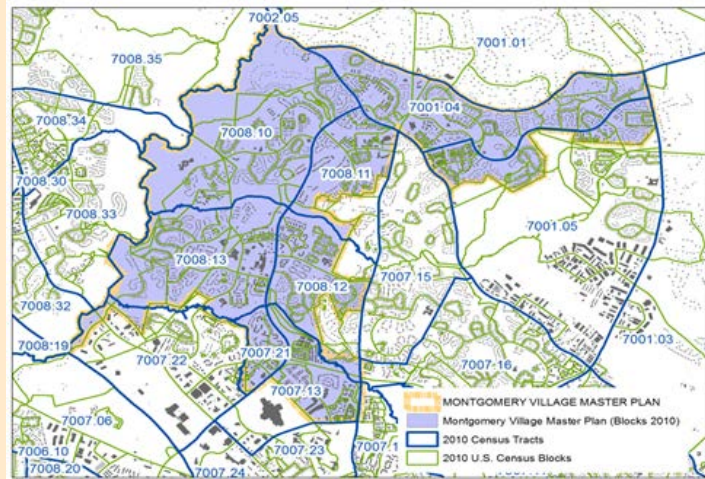
POPULATION + HOUSEHOLD COUNTS by time period and data source

Sources: U.S. Census Bureau, *2000 and 2010 U.S. Decennial Census and 2008-2012 American Community Survey 5-year estimates.*

	MONTGOMERY VILLAGE MASTER PLAN AREA[1]			MONTGOMERY VILLAGE DEMOGRAPHIC STUDY AREA[2]			MONTGOMERY COUNTY, MARYLAND		
	2000 Census	2010 Census	2008-12 ACS	2000 Census	2010 Census	2008-12 ACS	2000 Census	2010 Census	2008-12 ACS
Total Population	33,983	34,646	N/A due to inadequate sample size.	35,812	37,873	37,986	873,341	971,777	974,824
Households	12,948	12,662		13,478	13,620	13,496	324,565	357,086	357,579
Average Household Size	2.61	2.73		2.64	2.77	2.81	2.66	2.70	2.73

[1] Block level data from the 2000 and 2010 U.S. Census were compiled to approximate the Montgomery Village Master Plan boundaries. The 2010 MPA aligns with the master plan boundaries. Because a few 2000 U.S. Census blocks extend beyond the master plan boundary, the 2000 MPA is slightly larger than the 2010 MPA.

[2] Census tracts 1.04, 7.13, 7.21, 8.10, 8.11, 8.12, and 8.13 plus Block Groups 2 and 3 in Census tract 1.05.

AMERICAN COMMUNITY SURVEY DATA

The *American Community Survey* collects more detailed demographic data than the decennial census. Data are collected continuously throughout the decade; different people are surveyed at different times over a period of time, their answers are aggregated, and the data are tabulated as three-year or five-year averages for different Census geographies.

Due to sample size limitations, this analysis reports detailed American Community Survey population and household variables (age, education, income, etc.) for a slightly larger area than the master plan boundaries. This area, called the Montgomery **Village Demographic Study Area**, is defined by Census Tracts 1.04, 7.13, 7.21, 8.10, 8.11, 8.12, and 8.13 plus Block Groups 2 and 3 in Tract 1.05.

COG FORECAST DATA

COG *Forecast* data are reported in traffic analysis zones (TAZs) which do not correspond to Census tracts and blocks.

For the forecast analysis, the **Montgomery Village MPA** is defined as seven TAZs: 478, 484-486, and 489-491. The **Montgomery Village Study Area** is approximated by nine TAZs: 478, 483-486, and 489-492.

MONTGOMERY VILLAGE DEMOGRAPHIC STUDY AREA (DSA)
2008-2012 5-Year American Community Survey boundaries
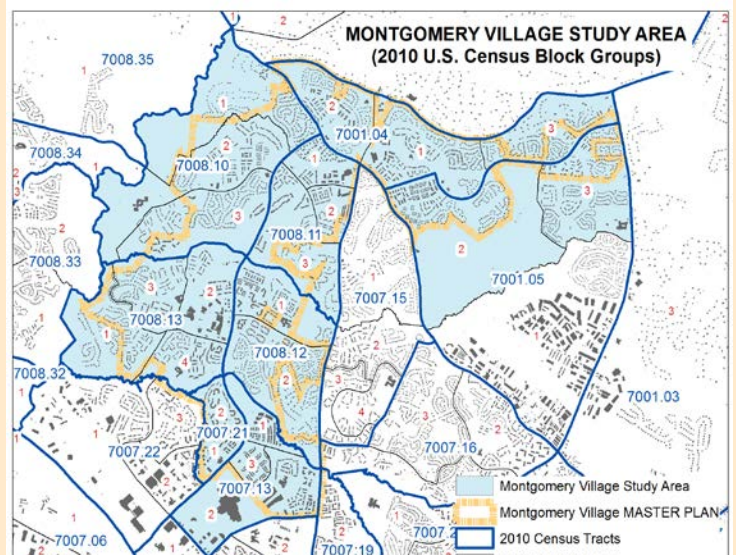
MONTGOMERY VILLAGE MASTER PLAN AREA (MPA)
and DEMOGRAPHIC STUDY AREA (DSA) BOUNDARIES
(TAZ-based approximations), Round 8.3 COG Forecast

Research Summary

Appendix 2

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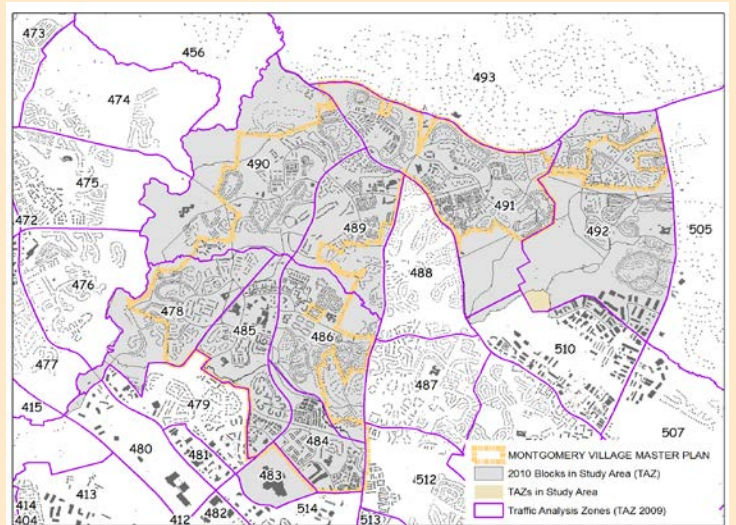
POPULATION AND HOUSEHOLD CHANGE, 2000 TO 2010

Note: For this section, the Montgomery Village Master Plan Area is referred to as "Montgomery Village" and the Montgomery Village Demographic Study Area is referred to as the "Study Area."

- According to the U.S. Decennial Census, Montgomery Village's population increased by 2 percent (663 persons) between 2000 and 2010, well below the County's 11 percent population growth over the same period. The Study Area lost 2 percent of its population over the decade.

- The number of households in Montgomery Village declined 2 percent (286 households), versus a 10 percent increase countywide. There was virtually no net growth in the Montgomery Village housing supply over the decade (0.2 percent versus 12 percent in the County), indicating that the decrease in households is likely due to residents vacating existing housing units. The portion of the Demographic Study Area that does not include the Master Plan Area had an 81 percent increase in housing units and households alike, a further sign that household loss is concentrated within the MPA.

- Owner and renter households declined at the same 2 percent pace in Montgomery Village. In the county as a whole, by contrast, there was an 8 percent increase in the number of homeowner households and a 14 percent increase in renter households.

POPULATION, HOUSEHOLD AND HOUSING CHANGE
2000 to 2010

- With a growing population and fewer households, the average size of a Montgomery Village household increased from 2.61 to 2.73 persons over the decade, outpacing growth in average household size countywide from 2.66 to 2.70 persons.
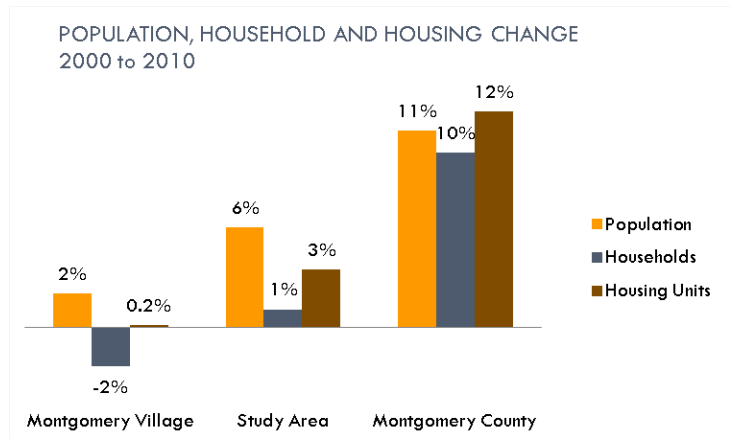
POPULATION + HOUSEHOLD CHANGE, 2000 to 2010

Sources: 2000 and 2010 U.S. Decennial Census, U.S. Census Bureau

	MONTGOMERY VILLAGE MASTER PLAN AREA[1]			MONTGOMERY VILLAGE DEMOGRAPHIC STUDY AREA[2]			MONTGOMERY COUNTY, MARYLAND		
	2000	**2010**	**change**	**2000**	**2010**	**change**	**2000**	**2010**	**change**
POPULATION	33,983	34,646	663	2%	35,812	37,873	2,061	6%	873,341	971,777	98,436	11%
HOUSEHOLDS	12,948	12,662	-286	-2%	13,478	13,620	142	1%	324,565	357,086	32,521	10%
Average Household Size	2.61	2.73	0.12	5%	2.64	2.77	0.13	5%	2.66	2.70	0.04	2%
HOUSING UNITS	13,328	13,349	21	0.2%	13,869	14,328	459	3%	334,632	375,905	41,273	12%
Occupied Units	12,948	12,662	-286	-2%	13,478	13,620	142	1%	324,565	357,086	32,521	10%
Owner-occupied	9,214	8,990	-224	-2%	9,657	9,706	49	1%	223,017	241,465	18,448	8%
Renter-occupied	3,734	3,672	-62	-2%	3,821	3,914	93	2%	101,548	115,621	14,073	14%
Vacant Units	380	687	307	81%	391	708	317	81%	10,067	18,819	8,752	87%
Vacancy Rate	2.9%	5.1%	2.3%	81%	2.8%	4.9%	2.1%	75%	3.0%	5.0%	2.0%	66%

[1] Block level data from the 2000 and 2010 U.S. Census were compiled to approximate the Montgomery Village Master Plan boundaries. The 2010 MPA aligns with the master plan boundaries. Because a few 2000 U.S. Census blocks extend beyond the master plan boundary, the 2000 MPA is slightly larger than the 2010 MPA.

[2] Census tracts 1.04, 7.13, 7.21, 8.10, 8.11, 8.12, and 8.13 plus Block Groups 2 and 3 in Census tract 1.05.
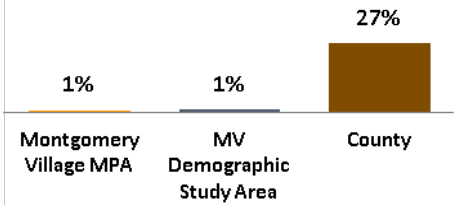
- According to the Round 8.3 COG Forecast, Montgomery Village's population is forecast to grow by 4 percent between 2010 and 2040, well below the 24 percent forecast growth rate for the County as a whole.

- Households in Montgomery Village are forecast to grow at a slower pace than population, increasing 1 percent over the same period. In contrast, the County's household base is forecast to increase 27 percent between 2010 and 2040.

- With population growing more quickly than households, the average household size in Montgomery Village is forecast to reach 2.83 persons per household in 2040 compared to 2.61 in Montgomery County as a whole.

POPULATION FORECAST
2010 TO 2040

- Montgomery Village MPA: 4%
- MV Demographic Study Area: 4%
- County: 24%
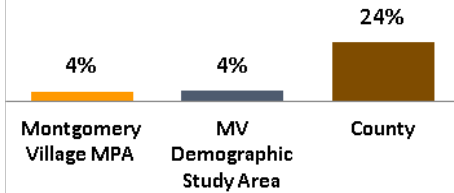
HOUSEHOLD FORECAST
2010 TO 2040

- Montgomery Village MPA: 1%
- MV Demographic Study Area: 1%
- County: 27%

AT-PLACE EMPLOYMENT FORECAST
2010 TO 2040

- Montgomery Village MPA: 11%
- MV Demographic Study Area: 9%
- County: 40%

ROUND 8.3 COG FORECAST

Population, Households, At-Place Employment line chart, 2010–2040.
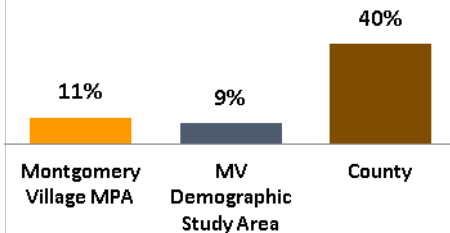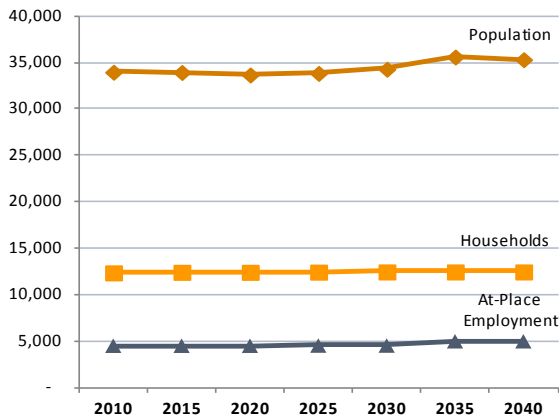
2040 FORECAST AVERAGE HOUSEHOLD SIZE

- Montgomery Village MPA: 2.83
- MV Demographic Study Area: 2.89
- County: 2.61
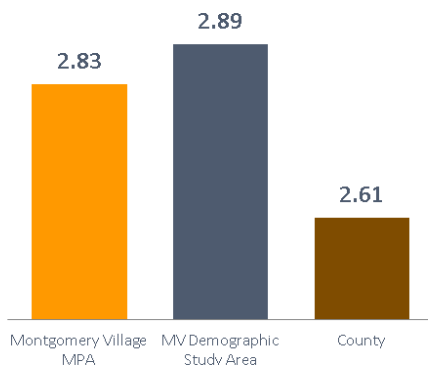
MONTGOMERY VILLAGE SHARE OF TOTAL POPULATION AND HOUSEHOLDS COUNTYWIDE

■ 2010   ■ 2040

- Share of County population: 3.5% (2010), 2.9% (2040)
- Share of County households: 3.4% (2010), 2.7% (2040)

Research Summary
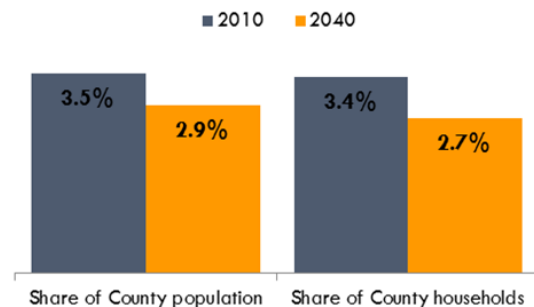
Montgomery Village Master Plan

POPULATION SUMMARY

Source: 2008-2012 American Community Survey, 5-year estimate, U.S. Census Bureau.

	MONTGOMERY VILLAGE STUDY AREA[1]		MONTGOMERY COUNTY	
AGE DISTRIBUTION	number	percent	number	percent
Total Population	**37,986**	**100%**	**974,824**	**100%**
Under 5 years	2,949	8%	64,073	7%
5 to 17 years	6,648	18%	168,806	17%
18 to 34 years	9,560	25%	207,064	21%
35 to 44 years	5,769	15%	141,478	15%
45 to 64 years	10,069	27%	272,247	28%
65 years +	2,991	8%	121,156	12%
MEDIAN AGE (YEARS)	**37.7**		**38.4**	
RACE + HISPANIC ORIGIN	number	percent	number	percent
Total Population	**37,986**	**100%**	**974,824**	**100%**
White Non-Hispanic	14,186	37%	479,708	49%
Hispanic/Latino[2]	9,982	26%	166,124	17%
Black Non-Hispanic	8,122	21%	162,939	17%
Asian/Pacific Islander Non-Hispanic	4,402	12%	135,711	14%
Other[3]	1,294	4%	30,342	3%
EDUCATIONAL ATTAINMENT	number	percent	number	percent
Persons 25 years and older	**25,415**	**100%**	**667,634**	**100%**
Less than high school	2,605	10%	59,814	9%
High school diploma	4,658	18%	94,335	14%
Associate's/trade/some college	6,211	25%	133,578	20%
Bachelor's degree	6,964	27%	177,612	27%
Graduate degree	4,977	20%	202,295	30%
COMMUTE MODE	number	percent	number	percent
Employed Residents	**21,049**	**100%**	**515,347**	**100%**
Driving	17,010	81%	390,451	76%
Public transit/rail	2,644	12%	79,308	15%
Walk/bicycle/other	582	3%	17,127	3%
Work at home	813	4%	28,461	6%
AVERAGE COMMUTE TIME (MINUTES)	**36.4**		**33.9**	
WORK LOCATION	number	percent	number	percent
Employed Residents	**21,049**	**100%**	**515,347**	**100%**
In Montgomery County	15,344	73%	306,357	59%
Elsewhere in Maryland	1,862	9%	55,769	11%
Outside of Maryland	3,843	18%	153,221	30%

[1] The Montgomery Village Study Area is defined as Census tracts 1.04, 7.13, 7.21, 8.10, 8.11, 8.12, and 8.13; and block groups 2 and 3 in tract 1.05.

[2] "Other" includes American Indian or Alaskan Native, Native Hawaiian or Pacific Islander, Some Other Race, and More Than Two

[3] Those of Hispanic origin may be of any race.

Research Summary

AGE DISTRIBUTION

- The population of the Montgomery Village Demographic Study Area ("Montgomery Village") is relatively young, with 51 percent under age 35 years compared to 45 percent Countywide, according to the 2008-2012 American Community Survey.

- The school-age population (ages 5 to 17) share in Montgomery Village was slightly higher compared to the County, at 17 percent versus 18 percent.

- Young adults (ages 18 to 34) accounted for one in four persons living in Montgomery Village, compared to one in five persons Countywide.

- Montgomery Village's senior population was comparatively small, accounting for eight percent of the population versus 12 percent of County residents.

- The median age of persons living in Montgomery Village is 37.7 years, compared to 38.4 years for the County as a whole.

MONTGOMERY VILLAGE STUDY AREA
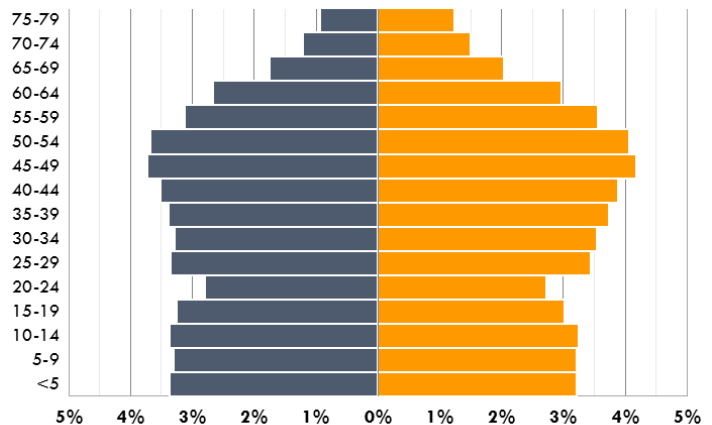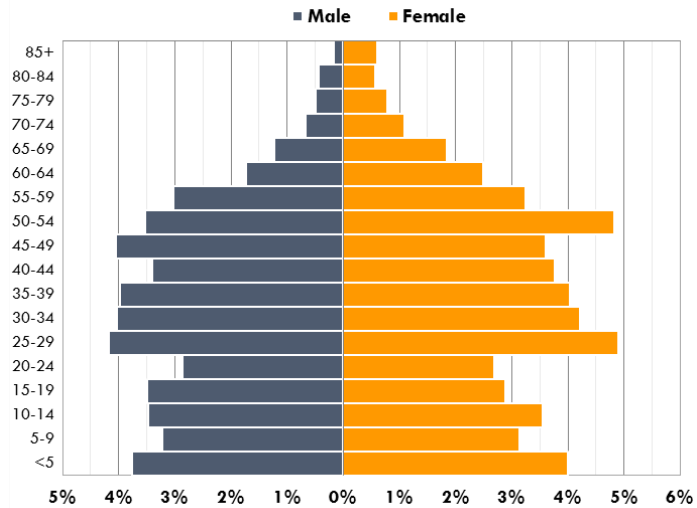
MEDIAN AGE (YEARS)

RACE + HISPANIC ORIGIN

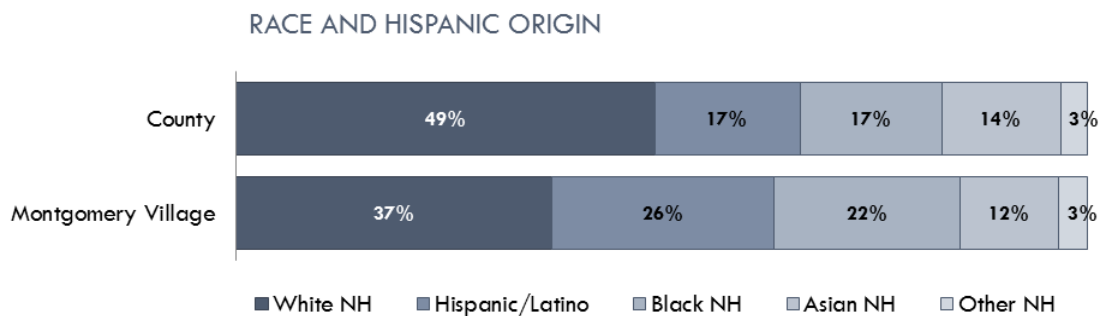- Non-Hispanic Whites accounted for the largest share (37 percent) of the Montgomery Village population.

- Hispanic/Latino residents made up 26 percent of the population, versus 17 percent Countywide.

- Non-Hispanic Black/African American residents made up 22 percent of the population, compared to 17 percent in the County.

- The non-Hispanic Asian population share was slightly smaller in Montgomery Village at 12 percent versus 14 percent Countywide.

RACE AND HISPANIC ORIGIN

	White NH	Hispanic/Latino	Black NH	Asian NH	Other NH
County	49%	17%	17%	14%	3%
Montgomery Village	37%	26%	22%	12%	3%

EDUCATIONAL ATTAINMENT

- Montgomery Village adults ages 25+ were slightly more likely to have less than a high school education compared to the population Countywide (10 percent versus nine percent).

- Nearly half (47 percent) of the adult population had a Bachelor's degree or higher, compared to 57 percent in the County.

- One in five Montgomery Village adults had an advanced degree, compared to three in ten Countywide. The proportion with a Bachelor's degree (27 percent) was equal to that of the County.

- People with associates degrees, trade school or some college eucation made up a slightly larger share of the adult popoulation in Montgomery Village (24 percent versus 20 percent Countwide).

EDUCATIONAL ATTAINMENT
Population age 25+

	Montgomery Village	County
Graduate/ professional/ doctorate degree	20%	30%
Bachelor's degree	27%	27%
Associate's degree/ trade school/ some college	24%	20%
High school diploma	18%	14%
Less than high school diploma	10%	9%

Research Summary
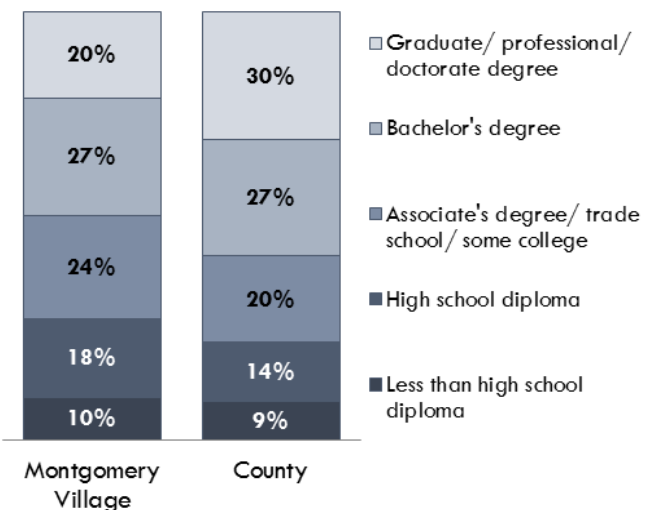
RESIDENT LABOR FORCE COMMUTE

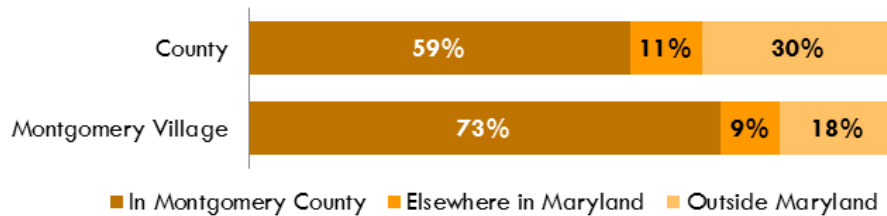- Montgomery Village residents were more likely to work in Montgomery County compared to the resident labor force Countywide (73 percent versus 59 percent).

- Eighteen percent commuted to jobs in Washington, D.C., Northern Virginia or other locations outside Maryland, compared to 30 percent of all workers living in Montgomery County.

- Compared to employed adults Countywide, workers living in Montgomery Village were more likely to drive to work (81 percent versus 76 percent), less likely to commute by transit (12 percent versus 15 percent) and less likely to work at home (4 percent versus 6 percent).

- The average commute time for Montgomery Village's resident workforce was 36.4 minutes, compared to 33.9 percent for workers in the County as a whole.

WORK LOCATION

	In Montgomery County	Elsewhere in Maryland	Outside Maryland
County	59%	11%	30%
Montgomery Village	73%	9%	18%

COMMUTE MODE
MONTGOMERY VILLAGE RESIDENTS

Driving, 81%
Public Transit / Rail, 12%
Walk/Bike/ Other, 3%
Work at Home, 4%
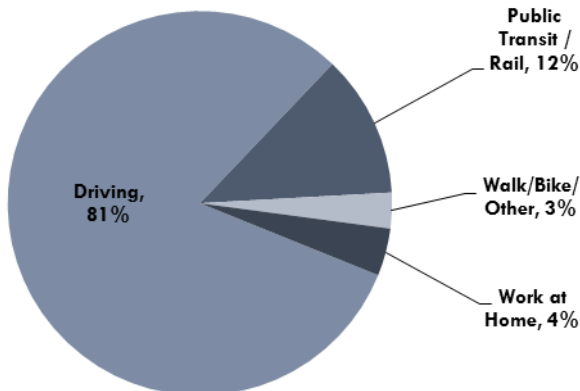
AVERAGE COMMUTE TIME
in minutes

Montgomery Village	County
36.4	33.9
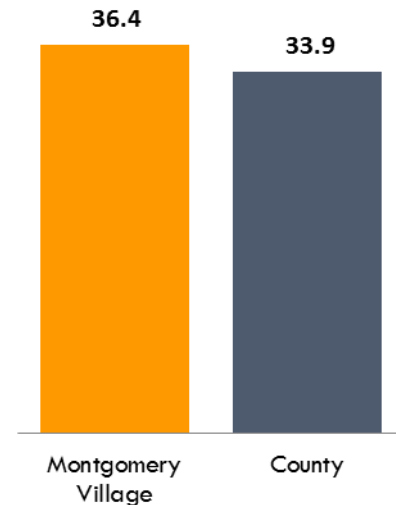
HOUSEHOLD SUMMARY

Source: 2008-2012 American Community Survey, 5-year estimate, U.S. Census Bureau.

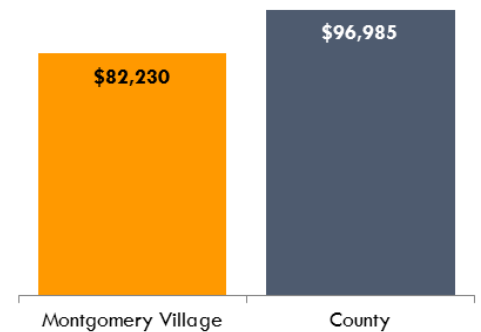|	MONTGOMERY VILLAGE[1]		MONTGOMERY COUNTY	
INCOME DISTRIBUTION	number	percent	number	percent
Total Households	**13,496**	**100%**	**357,579**	**100%**
Less than $15,000	524	4%	19,054	5%
$15,000 to $24,999	691	5%	16,136	5%
$25,0000 to $34,999	1,033	8%	17,800	5%
$35,000 to $49,999	1,635	12%	31,921	9%
$50,000 to $74,999	2,355	18%	53,933	15%
$75,000 to $99,999	1,764	13%	44,451	12%
$100,000 to $149,999	2,667	20%	71,288	20%
$150,000 to $199,999	1,499	11%	42,665	12%
$200,000 or more	1,328	10%	60,331	17%
MEDIAN HOUSEHOLD INCOME	**$82,230**		**$96,985**	
HOUSEHOLD TYPES	number	percent	number	percent
Total Households	**13,496**	**100%**	**357,579**	**100%**
Family Households	**9,277**	**69%**	**244,586**	**68%**
Married Couple	6,665	49%	190,711	53%
with own children under 18	*3,596*	*27%*	*91,350*	*26%*
Other family, no spouse	2,612	19%	53,875	15%
with own children under 18	*1,410*	*10%*	*27,735*	*8%*
Non-Family Households	**4,219**	**31%**	**112,993**	**32%**
Householder Living Alone	3,373	25%	92,197	26%
with Householder Over 65 Living Alone	*783*	*6%*	*31,745*	*9%*
Two or More Unrelated Householders	846	6%	20,796	6%
TENURE TYPE	number	percent	number	percent
Total Households	**13,496**	**100%**	**357,579**	**100%**
Owner households	9,985	74%	243,751	68%
Renter households	3,511	26%	113,828	32%
HOUSEHOLD SIZE BY TENURE TYPE	number	percent	number	percent
Owner Households	**9,985**	**100%**	**243,751**	**100%**
1-person	2,428	24%	51,797	21%
2-person	3,015	30%	78,222	32%
3-person	1,820	18%	41,947	17%
4-person	1,402	14%	42,324	17%
5-person or greater	1,320	13%	29,461	12%
Renter Households	**3,511**	**100%**	**113,828**	**100%**
1-person	945	27%	40,400	36%
2-person	745	21%	32,216	28%
3-person	811	23%	17,920	16%
4-person	554	16%	13,511	12%
5-person or greater	456	13%	9,781	9%
AVERAGE HOUSEHOLD SIZE				
All Households	**2.81**		**2.73**	
Owner households	2.80		2.83	
Renter households	2.81		2.43	

INCOME

- At $82,230, the median household income in Montgomery Village was 85 percent of the Countywide median of $96,985, according to the 2008-2012 American Community Survey.

- Compared to the County as a whole, Montgomery Village households were concentrated in middle income ranges, with relatively fewer housholds at either the very low or very high end of the income spectrum.

- Montgomery Village had more households earning between $25,000 and $49,999 (20 percent versus 14 percent) and between $50,000 to $99,999 (43 percent versus 36 percent).

- As in the County as a whole, 20 percent of Montgomery Village households earn between $100,000 and $149,999 per year.

- Montgomery Village earning patterns in part reflect the study area's relatively younger age profile. Householders in their prime earning years between ages 45 and 64 are concentrated in higher income categories. Households headed by persons under age 25, who are at earlier stages of their careers and are more likely to be single, are concentrated in the lowest income categories.

INCOME DISTRIBUTION

Legend: ■ County ■ Montgomery Village

Income	County	Montgomery Village
$200K +	17%	10%
$150K to $199K	12%	11%
$100K to $149K	20%	20%
$75K to $99K	12%	13%
$50K to $74K	15%	18%
$35K to $49K	9%	12%
$25K0 to $34K	5%	8%
$15K to $24K	5%	5%
<$15K	5%	4%

MEDIAN HOUSEHOLD INCOME
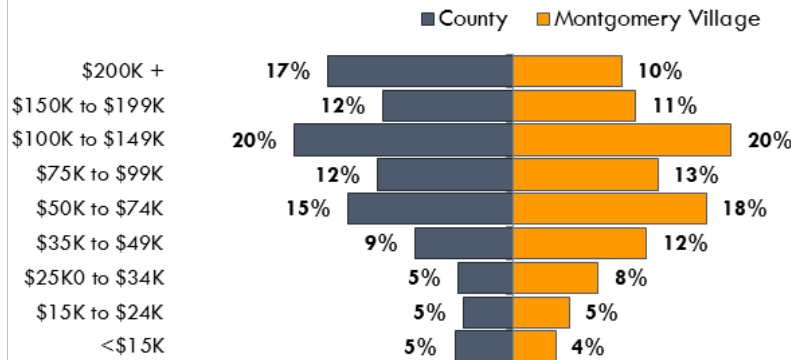
Montgomery Village	County
$82,230	$96,985

HOUSEHOLD INCOME by age of head of household
Montgomery Village

Legend: ■ < Age 25 ■ Age 25-44 ■ Age 45-64 ■ Age 65+

Income	< Age 25	Age 25-44	Age 45-64	Age 65+
$200k+		405	774	149
$150k to $199k		450	833	216
$125k to $149k		364	405	114
$100k to $124k		774	849	161
$75k to $99k		775	802	187
$50k to $74k	35	1,175	830	315
$25k to $49k	100	1,209	993	366
<$25k	48	447	473	247
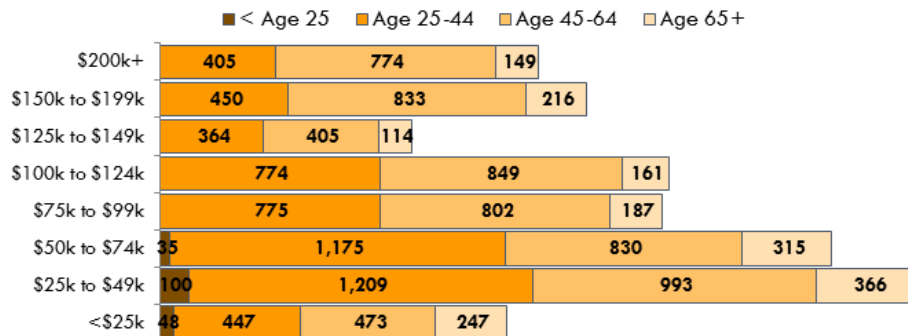
HOUSEHOLD TYPES

- Roughly half of Montgomery Village households (49 percent) are married couple families (with or without children). This is similar to households Countywide (53 percent).
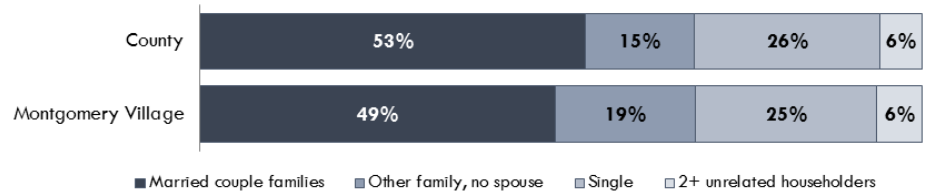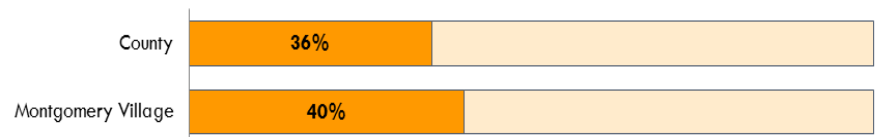
- Other families, including single-parent households, make up a slightly larger share of Montgomery Village households (19 percent versus 15 percent).

- As in the County as a whole, singles living along account for one in four Montgomery Village housholds.

HOUSEHOLDS BY TYPE

County	53%	15%	26%	6%
Montgomery Village	49%	19%	25%	6%

■ Married couple families   ■ Other family, no spouse   ■ Single   □ 2+ unrelated householders

HOUSEHOLDS WITH CHILDREN UNDER THE AGE OF 18 YEARS

County	36%
Montgomery Village	40%

- Montgomery Village has a larger share of households with pre-school and school-age children (40 percent versus 36 percent).

- Fewer Montgomery Village households have one or more senior members age 65 and up (17 percent versus 24 percent).

- Seniors living alone account for 6 percent of Montomgery Village households, versus 9 percent Countywide.

HOUSEHOLDS WITH PEOPLE AGES 65 YEARS+

County	24%
Montgomery Village	17%

HOUSEHOLDS WITH SENIORS AGE +65 LIVING ALONE

County	9%
Montgomery Village	6%

Research Summary
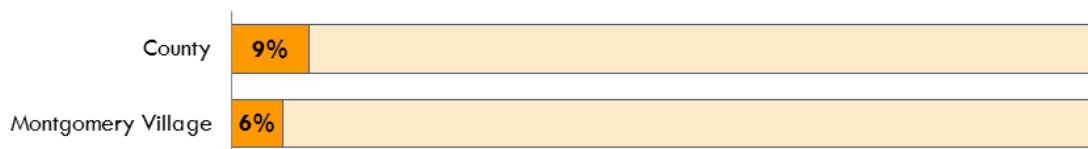
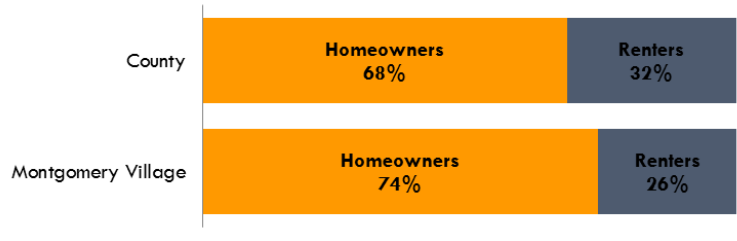## HOUSEHOLD TENURE

- Montgomery Village had a higher homeownership rate compared to the County (74 percent versus 68 percent of households Countywide).

- Montgomery Village homeowner household sizes were similar to the County as a whole. A slightly higher proportion of Montgomery Village homeowners were singles living alone (24 percent versus 21 percent).

- Rental households had a markedly different profile from renters Countywide. Singles living alone accounted for 27 percent of renters in Montgomery Village, well below the County's 36 percent rate.

HOUSEHOLDS BY TENURE TYPE

| County | Homeowners 68% | Renters 32% |
| Montgomery Village | Homeowners 74% | Renters 26% |

AVERAGE HOUSEHOLD SIZE
Persons per household

	Renters	Homeowners	All households
County	2.43	2.83	2.73
Montgomery Village	2.81	2.80	2.81

- 2-person households made up 21 percent of renter households in Montgomery Village versus 28 percent in the County. More striking is that 52 percent of Montgomery Village rental households have 3 or more persons, much higher than the 36 percent of renter households in the County. This is also higher than the proportion of Montgomery Village homeowner households with 3 or more persons (45 percent).

- In the County as a whole, the average size of a homeowner household is 2.83 persons, versus 2.43 for renter households. By contrast, in Montgomery Village, there is virtually no difference in the average size of a homeowner or renter household (2.80 versus 2.81).

HOMEOWNER HOUSEHOLDS BY SIZE

Montgomery Village:
- 5+ person 13%
- 4 person 14%
- 3 person 18%
- 2 person 30%
- 1 person 24%

County:
- 5+ person 12%
- 4 person 17%
- 3 person 17%
- 2 person 32%
- 1 person 21%

RENTER HOUSEHOLDS BY SIZE

Montgomery Village:
- 5+ person 13%
- 4 person 16%
- 3 person 23%
- 2 person 21%
- 1 person 27%

County:
- 5+ person 9%
- 4 person 12%
- 3 person 16%
- 2 person 28%
- 1 person 36%

Research Summary

HOUSING COSTS

- Montgomery Village homeowners had comparatively low housing costs. At $1,587 per month, Montgomery Village homeowners on average spent only 64 percent of the $2,471 countywide housing average.

- Even so, Montgomery Village homeowners were "housing-burdened," spending more than a third of their household income on housing (28 percent versus 24 percent countywide).

- Renter households in Montgomery Village also were more likely to be housing-burdened compared to renters countywide (47 percent versus 41 percent), even though average rents in Montgomery Village were lower ($1,456 versus $1,588 per month).

AVERAGE MONTHLY HOUSING COSTS
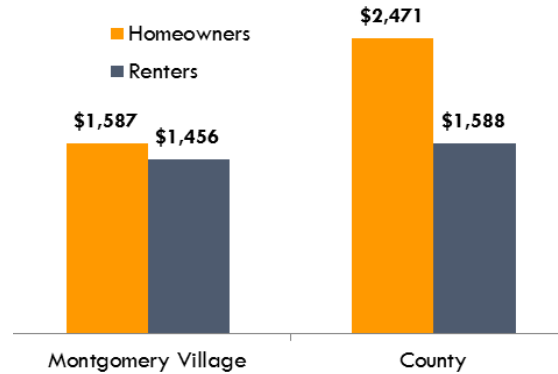
HOUSING COST BURDEN
Percent of households spending 35% or more of income on housing
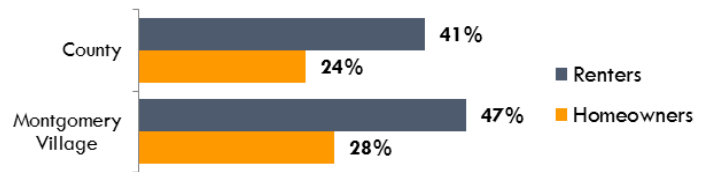
Montgomery Village Master Plan

HOUSING COST BURDEN

Monthly Housing Costs as a Percentage of Household Income, by Tenure
Source: 2008-2012 American Community Survey, 5-year estimate, U.S. Census Bureau.

	MONTGOMERY VILLAGE		MONTGOMERY COUNTY	
OWNER HOUSING COSTS	NUMBER	PERCENT	NUMBER	PERCENT
Monthly costs as a percent of household income				
Owner households	**9,985**	**100%**	**243,751**	**100%**
Less than 20%	3,786	38%	106,724	44%
20% to 24.9%	1,380	14%	34,642	14%
25% to 29.9%	1,100	11%	25,619	11%
30% to 34.9%	929	9%	18,302	8%
Over 35%	2,790	28%	58,464	24%
Average monthly owner costs	**$1,587**		**$2,471**	
RENTER HOUSING COSTS				
Monthly costs as a percent of household income				
Renter households	**3,511**	**100%**	**113,828**	**100%**
Less than 20%	632	18%	25,042	22%
20% to 24.9%	492	14%	15,936	14%
25% to 29.9%	421	12%	13,659	12%
30% to 34.9%	316	9%	12,521	11%
Over 35%	1,650	47%	46,669	41%
Average monthly renter costs	**$1,456**		**$1,588**	

Research Summary

JOBS + INDUSTRY

DATA SOURCES AND GEOGRAPHIES

This section examines at-place employment and establishment data from the Maryland Department of Labor, Licensing and Regulation's (DLLR) *Quarterly Census of Earnings and Wages* for the second quarter of 2013. This data source is a census of establishments based on quarterly unemployment insurance (UI) contribution reports filed by nearly all employers in the state. It does not cover self-employed workers, members of the Armed Forces, some domestic workers and other employees of firms that are excluded from UI coverage. Due to confidentiality requirements, information on individual enterprises such as specific employment counts is not available. Because it is a 100 percent count, QCEW data is reported for the Montgomery County Master Plan boundaries. There is not a separate study area.

Montgomery Village Master Plan

JOBS + INDUSTRY SUMMARY

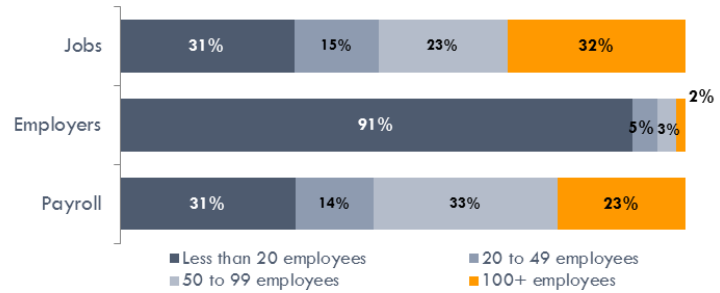**Source**: Maryland DLLR, Quarterly Census of Earnings & Wages, 2nd quarter 2013

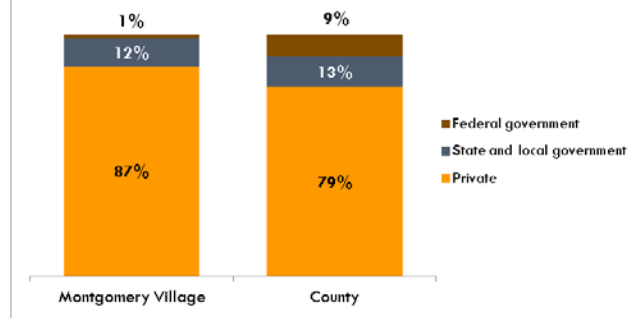|	MONTGOMERY VILLAGE			MONTGOMERY COUNTY		
TOTAL	jobs	establishments	payroll (000)	jobs	establishments	payroll (000)
As of 2nd quarter 2013	**5,085**	**485**	**$51,140**	**534,718**	**34,098**	**$8,594,930**
WORKPLACE SIZE	jobs	establishments	payroll (000)	jobs	establishments	payroll (000)
Less than 20 employees	31%	91%	31%	20%	89%	15%
20 to 49 employees	15%	5%	14%	12%	6%	10%
50 to 99 employees	23%	3%	33%	13%	3%	12%
100+ employees	32%	2%	23%	55%	2%	63%
PUBLIC / PRIVATE SECTOR	jobs	establishments	payroll (000)	jobs	establishments	payroll (000)
Private	87%	99%	76%	79%	99%	73%
Local government	12%	1%	22%	12%	1%	13%
State government	0%	0%	0%	0.20%	0.03%	0.14%
Federal government	1%	0.21%	2%	9%	0.3%	14%
BY INDUSTRY	``	establishments	payroll (000)	jobs	establishments	payroll (000)
Health Care & Social Assistance	29%	13%	20%	14%	11%	12%
Retail Trade	14%	11%	9%	9%	8%	5%
Educational Services	13%	2%	23%	11%	2%	12%
Accommodation & Food Services	11%	8%	4%	7%	6%	2%
Prof., Scientific, & Tech. Svcs	9%	21%	20%	13%	19%	20%
Consumer Services	7%	13%	4%	4%	23%	3%
Business & Household Services	6%	7%	5%	7%	6%	4%
Finance & Insurance	3%	5%	8%	5%	5%	7%
Public Administration	0%	0%	0%	10%	0%	14%
Management of Comp. & Enterprises	0%	0%	0%	2%	0%	3%
Other	8%	19%	8%	17%	20%	18%

AT-PLACE EMPLOYMENT

- According to Maryland DLLR data, Montgomery Village had 485 business, non-profit and government establishments employing nearly 5,100 people as of the second quarter of 2013.

- As in the County as a whole, nine out of ten employers has fewer than 20 employees. These establishments supply 31 percent of all jobs in Montgomery Village.

- Only 2 percent of Montgomery Village employers have more than 100 employees in the plan area, but these larger establishments provide the largest share of jobs (32 percent).

- The private sector accounts for a relatively large share (87 percent versus 79 percent) of jobs in Montgomery Village, primarily because the County as a whole has a much larger federal presence (9 percent of jobs versus 1 percent in Montgomery Village.

MONTGOMERY VILLAGE EMPLOYMENT
Jobs, employers and payroll by establishment size

	Less than 20 employees	20 to 49 employees	50 to 99 employees	100+ employees
Jobs	31%	15%	23%	32%
Employers	91%	5%	3%	2%
Payroll	31%	14%	33%	23%

PUBLIC vs. PRIVATE SECTOR JOBS

	Montgomery Village	County
Federal government	1%	9%
State and local government	12%	13%
Private	87%	79%

MAJOR EMPLOYERS(2013)

Employers with 100+ employees in Montgomery Village

Source: Maryland DLLR, Quarterly Census of Earnings & Wages, 2q2013; Montgomery County Planning Department, Research & Special Projects Division.

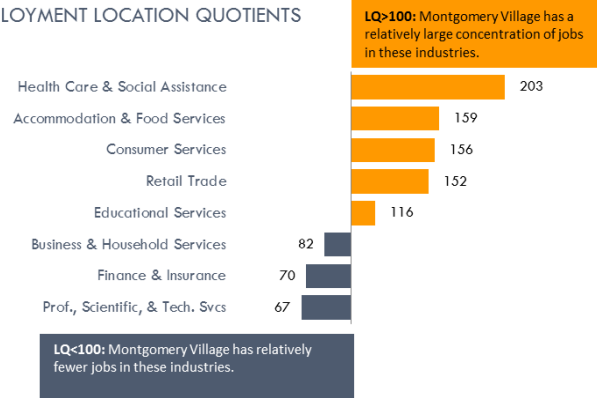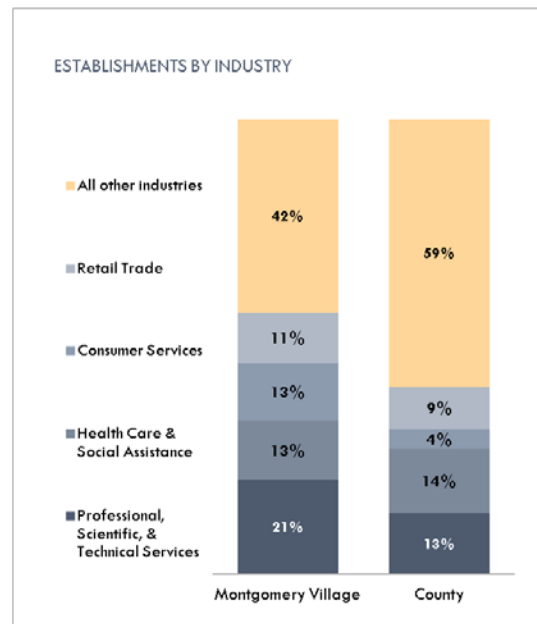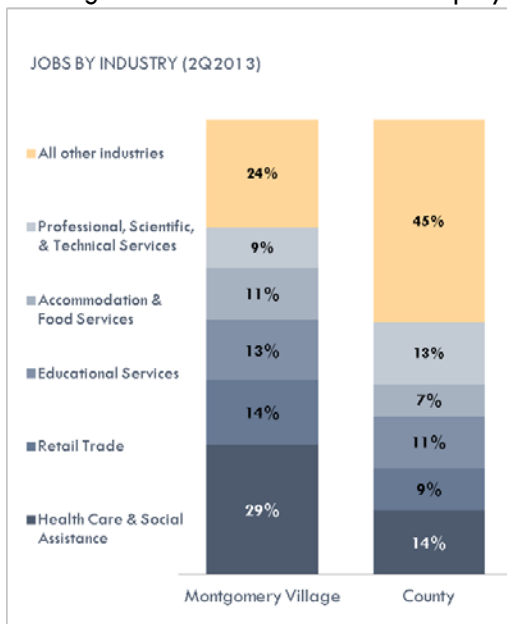| **500 to 999 employees in MVMPA**	
Montgomery County Public Schools	Educational Services-Elementary & Secondary Schools
250 to 499 employees in MVMPA	
Community Services for Autistic Adults & Children	Health Care & Social Assistance-Res. Mental Health & Substance Abuse Facilities
100 to 249 employees in MVMPA	
Capital Home Care	Health Care & Social Assistance-Services for Elderly & Persons w/Disabilities
Montgomery Village Health Care	Health Care & Social Assistance-Continuing Care Retirement Communities
Montgomery Village Foundation	Consumer Services-Civic Organizations
Giant Food	Retail Trade-Supermarkets/Grocery Stores
McDonald's	Accommodation & Food Services-Limited-Service Restaurants
Little Caesars	Accommodation & Food Services-Limited-Service Restaurants
50 to 99 employees in MVMPA	
Sunrise at Montgomery Village	Health Care & Social Assistance-Continuing Care Retirement Communities
Manpower International	Business & Household Services-Temporary Help Services
U.S. Postal Service	Transportation & Warehousing-Postal Service
Omnitec Solutions	Professional, Scientific, & Tech. Svcs-Engineering Services
Care Plus Home Health	Health Care & Social Assistance-Home Health Care Services
Trader Joe's	Retail Trade-Supermarkets/Grocery Stores
CHI Centers	Health Care & Social Assistance-Vocational Rehabilitation Services
H Mart	Retail Trade-Supermarkets/Grocery Stores
Family Christian Stores	Retail Trade-Book Stores
Majic Janitorial	Business & Household Services-Janitorial Services
Morgan Stanley Smith Barney	Finance & Insurance-Investment Banking & Securities Dealing
Black & Veatch Corporation	Professional, Scientific, & Tech. Svcs-Engineering Services

Research Summary

INDUSTRY MIX

- *Health Care and Social Assistance* industry establishments provide the largest share of jobs in Montgomery Village (29 percent versus 14 percent of jobs in the county). This sector includes several eldercare facilities and home health care services, as well as community services such as support for adults and children with developmental disabilities. Jobs in this sector generally serve a wider market area than Montgomery Village alone. Health Care and Social Assistance has a very high job location quotient of 203 in Montgomery Village, indicating that this industry is highly concentrated in the area.

EMPLOYMENT LOCATION QUOTIENTS

LQ>100: Montgomery Village has a relatively large concentration of jobs in these industries.

Industry	LQ
Health Care & Social Assistance	203
Accommodation & Food Services	159
Consumer Services	156
Retail Trade	152
Educational Services	116
Business & Household Services	82
Finance & Insurance	70
Prof., Scientific, & Tech. Svcs	67

LQ<100: Montgomery Village has relatively fewer jobs in these industries.

LOCATION QUOTIENT (LQ)
= [industry % of all jobs in MVMPA] / [industry % of all jobs in the County] x 100

- The next three largest job sectors, *Retail Trade* (14 percent), *Educational Services* (13 percent) and *Accommodation and Food Services* (11 percent) generally are community or neighborhood-serving. Individual establishments such as Trader Joe's may have a wider draw. Supermarkets make up the largest retail component; Giant, Trader Joe's and H Mart are among the largest employers in Montgomery Village. The Montgomery County Public School system accounts for most education sector jobs in Montgomery Village, which has one high school, a middle school and four elementary schools in its boundaries. Most food service jobs are in limited-service restaurants. Although national chains provide most employment in this sector, Montgomery Village also has a number of locally based, primarily ethnic food establishments.

- Although the Professional, Scientific and Technical Services sector supplies 9 percent of jobs in Montgomery Village, it accounts for the largest number of business establishments (21 percent). Small to mid-size architectural, engineering, law and accounting services provide most of the jobs in this sector. Most enterprises in this sector are very small computer programming, computer systems design and management consulting services with fewer than 5 employees.

JOBS BY INDUSTRY (2Q2013)

	Montgomery Village	County
All other industries	24%	45%
Professional, Scientific, & Technical Services	9%	13%
Accommodation & Food Services	11%	7%
Educational Services	13%	11%
Retail Trade	14%	9%
Health Care & Social Assistance	29%	14%

ESTABLISHMENTS BY INDUSTRY

	Montgomery Village	County
All other industries	42%	59%
Retail Trade	11%	9%
Consumer Services	13%	4%
Health Care & Social Assistance	13%	14%
Professional, Scientific, & Technical Services	21%	13%

Research Summary

WORKFORCE

DATA SOURCES AND GEOGRAPHIES

All data in this section is from the U.S. Census Bureau's *Local Employment-Household Dynamics (LEHD) Origin-Destination Employment* statistics for 2011. This data set makes it possible to examine the characteristics of workers who live in a given area regardless of where they work (resident employment), as well as workers who work in that same area regardless of where they live (at-place employment). Montgomery Village data was obtained for the plan area boundaries. There is no separate study area.

INFLOW/OUTFLOW

- An estimated 97 percent of employed workers who live in Montgomery Village commute to jobs outside the master plan area boundaries.

- 93 percent of jobs in Montgomery Village are filled by people commuting into the plan area.

- Fewer than 400 people live and work in Montgomery Village.

- There is a net outflow from Montgomery Village of around 10,000 workers.

WORKER IN-FLOW/OUT-FLOW COUNTS

Source: U.S. Census Bureau, LEHD Origin-Destination Employment Statistics (2011)

EMPLOYED MONTGOMERY VILLAGE RESIDENTS		
Out-commuters	14,959	97%
Live and work in Montgomery Village	387	3%
TOTAL	**15,346**	**100%**

JOBS IN MONTGOMERY VILLAGE		
In-commuters	4,916	93%
Live and work in Montgomery Village	387	7%
TOTAL	**5,303**	**100%**

NET INFLOW/OUTFLOW	
Employed residents of Montgomery Village	15,346
Jobs in Montgomery Village	(5,303)
NET OUTFLOW	**10,043**

MONTGOMERY VILLAGE
COMMUTING PATTERNS

Commute into MV 4,916

Live and work in MV 387

Commute out of MV 14,959

Research Summary
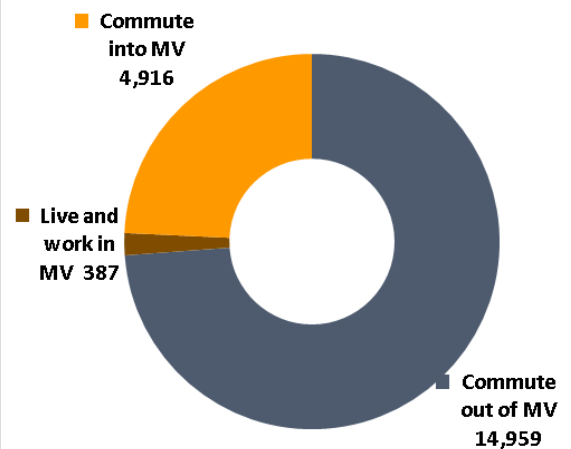
JOBS BY INDUSTRY

- Montgomery Village residents work of industries that is very similar to that of people working in the County as a whole.

- The plan area has no large IT companies or federal installations that are a mainstay of the County's economy, and which employ many Montgomery Village residents. Professional,Scientific and Technical Services account for the largest share of resident employment (14 percent). Roughly one in ten Montgomery Village residents is a federal employee.

- A number of Montgomery Village residents also work in industries that are well-represented in Montgomery Village, including health care (13 percent), retail (10 percent), education (9 percent) and accommodation/food services (8 percent), but few work in Montgomery Village.

Montgomery Village Master Plan   in a diverse range

WORKER CHARACTERISTICS (2011)

Source: U.S. Census Bureau, OnTheMap Application and LEHD Origin-Destination Employment Statistics (2011)

JOBS BY INDUSTRY (ESTIMATED)	WORKS IN MV	LIVES IN MV	ALL COUNTY WORKERS
Health Care	34%	13%	13%
Education	15%	9%	8%
Accommodation/Food Services	8%	8%	6%
Retail	10%	10%	9%
Prof/Sci/Tech	8%	14%	15%
Public Admin	1%	10%	11%
Other	24%	36%	36%
WORKERS BY AGE	WORKS IN MV	LIVES IN MV	ALL COUNTY WORKERS
Age 29 or younger	22%	23%	21%
Age 30 to 54	57%	57%	57%
Age 55 or older	21%	20%	22%
WORKERS BY INCOME	WORKS IN MV	LIVES IN MV	ALL COUNTY WORKERS
$1,250 per month or less	29%	20%	19%
$1,251 to $3,333 per month	38%	31%	27%
More than $3,333 per month	33%	49%	54%
WORKER RACE	WORKS IN MV	LIVES IN MV	ALL COUNTY WORKERS
White Alone	60%	66%	67%
Black or African American Alone	29%	23%	21%
American Indian or Alaska Native Alone	0%	1%	0%
Asian Alone	9%	9%	10%
Native Hawaiian or Other Pacific Islander Alone	0%	0%	0%
Two or More Race Groups	1%	2%	2%
WORKER ETHNICITY	WORKS IN MV	LIVES IN MV	ALL COUNTY WORKERS
Not Hispanic or Latino	89%	82%	89%
Hispanic or Latino	11%	18%	11%
EDUCATIONAL ATTAINMENT (WORKERS AGE 30+)	WORKS IN MV	LIVES IN MV	ALL COUNTY WORKERS
Less than high school	13%	15%	11%
High school diploma	22%	21%	19%
Associate's degree/some college	28%	26%	26%
Bachelor's degree or higher	36%	38%	44%
WORKER SEX	WORKS IN MV	LIVES IN MV	ALL COUNTY WORKERS
Male	41%	48%	48%
Female	59%	52%	52%

WORKERS BY INDUSTRY

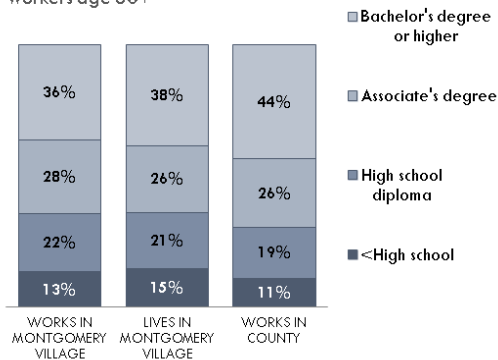■Health Care ■Education ■Accommodation/Food Services ■Retail □Prof/Sci/Tech □Other ■Public Admin
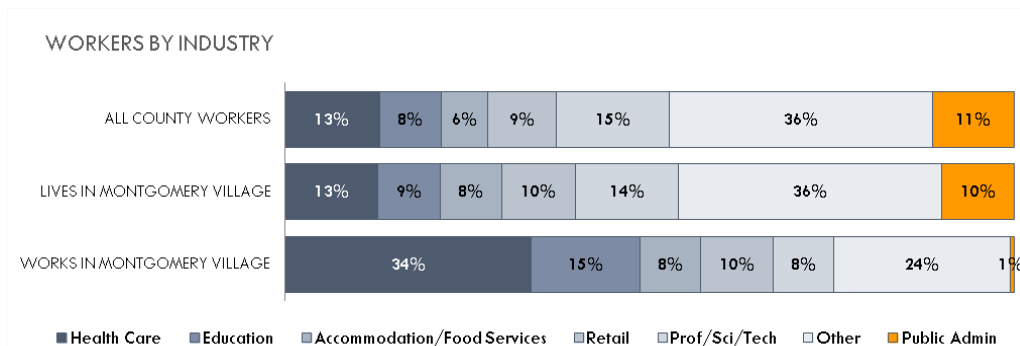
WORKFORCE CHARACTERISTICS

- Montgomery Village jobs are generally lower paying compared to the County's at-place workforce as a whole. 67 percent of jobs in the plan area pay less than $3,334 per month, compared to 43 percent of jobs countywide. Montgomery Village residents have an earnings profile that more closely resembles the County.

- Most workers who live in Montgomery Village are White (66 percent) or Black/African American (23 percent). 18 percent of the Montgomery Village resident workforce identifies as Hispanic (Hispanics may be any race).

- Most people who work in Montgomery Village are White (60 percent) but relatively few are Hispanic (11 percent) given that Hispanics make up a larger share of the resident labor force. Black/African American workers fill a relatively large share of jobs in Montgomery Village (29 percent) given their share of the resident labor force.

- The educactional attainment profile of workers who either live or work in Montgomery Village is relatively similar.

- Women make up 52 percent of the resident workforce in Montgomery Village, identical to the share of women working in jobs the County. Women make up a larger share (59 percent) of people working in Montgomery Village jobs.
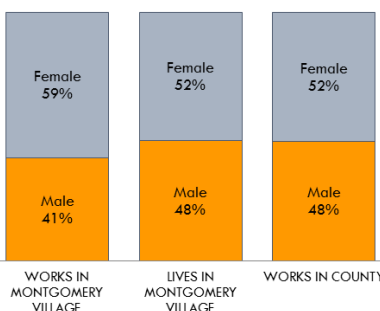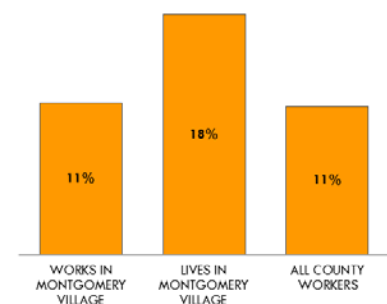
WORKERS BY INCOME RANGE

	WORKS IN MONTGOMERY VILLAGE	LIVES IN MONTGOMERY VILLAGE	ALL COUNTY WORKERS
More than $3,333 per month	33%	49%	54%
$1,251 to $3,333 per month	38%	31%	27%
$1,250 per month or less	29%	20%	19%

	WORKS IN MONTGOMERY VILLAGE	LIVES IN MONTGOMERY VILLAGE	WORKS IN COUNTY
Other	9%	9%	10%
Asian	29%	23%	21%
White	60%	66%	67%

EDUCATIONAL ATTAINMENT
workers age 30+

	WORKS IN MONTGOMERY VILLAGE	LIVES IN MONTGOMERY VILLAGE	WORKS IN COUNTY
Bachelor's degree or higher	36%	38%	44%
Associate's degree	28%	26%	26%
High school diploma	22%	21%	19%
<High school	13%	15%	11%

WORKERS BY SEX

	WORKS IN MONTGOMERY VILLAGE	LIVES IN MONTGOMERY VILLAGE	WORKS IN COUNTY
Female	59%	52%	52%
Male	41%	48%	48%

HISPANIC SHARE OF WORKFORCE

WORKS IN MONTGOMERY VILLAGE	LIVES IN MONTGOMERY VILLAGE	ALL COUNTY WORKERS
11%	18%	11%

Research Summary

WORKFORCE CHARACTERISTICS BY INFLOW /OUTFLOW STATUS

- The job mix of out-commuters from Montgomery Village very closely resembles the county's job base.

- As noted, many Montgomery Village residents work in industries similar to those found in Montgomery Village. Even so, fewer than 400 people both live and work in Montgomery Village, indicating that most of these residents are out-commuters.

- Out-commuters are somewhat younger than people who work in Montgomery Village, with peope under the age of 30 accounting for 23 percent of out-commuters versus 17 percent of in-commuters. 27 percent of in-commuters are age 55 and up.

- People who both live and work in Montgomery Village work in a mix of industries similar to those of in-commuters, with 35 percent employed in the health care sector.

- However, a key difference is that people who live and work in Montgomery Village tend to have higher incomes than both out-commuters and in-commuters as well as workers countywide.

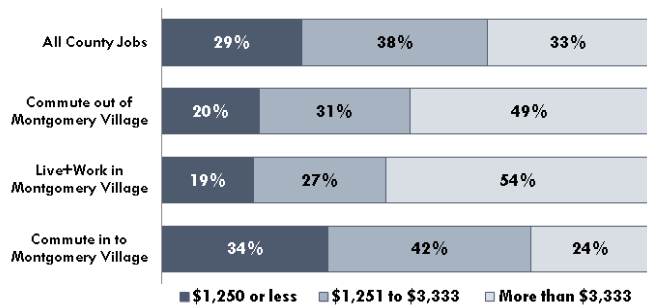- In-commuters are concentrated in low-paying jobs, with 76 percent earning less than $3,334 per month.

WORKERS BY INDUSTRY
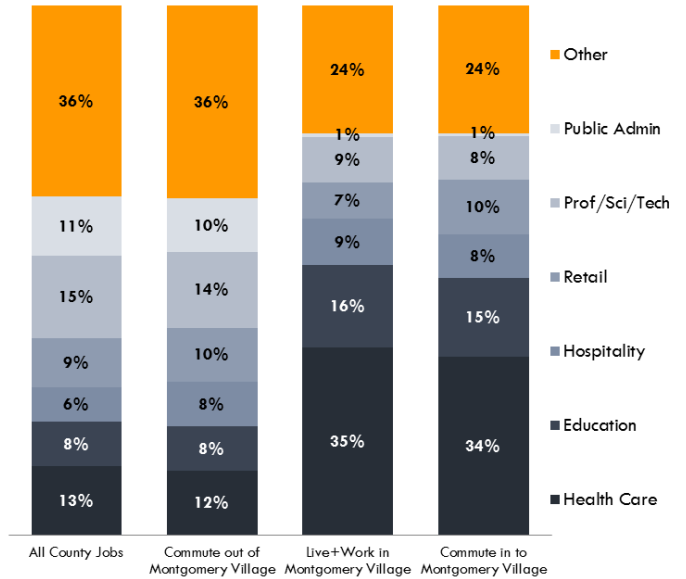
WORKER AGE MIX
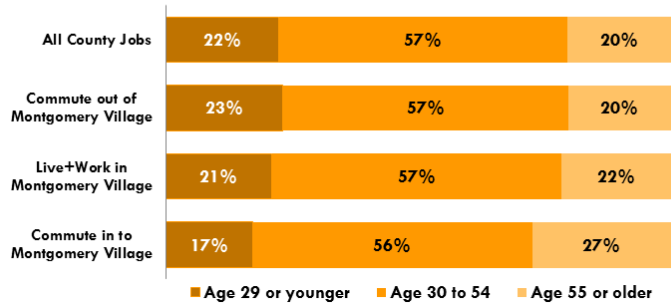
WORKER INCOME MIX

COMMERCIAL SPACE

DATA SOURCES AND GEOGRAPHIES

All data in this section is from Montgomery County Planning Department staff analysis of CoStar data. Montgomery Village data was obtained for the plan area boundaries. There is no separate study area.

COMMERCIAL SPACE MIX

- Retail accounts for the largest share (57 percent) of commercial space in Montgomery Village, with 741,000 square feet of leased retail space.

- There are 22 office buildings with more than 550,000 square feet of leased space. Montgomery Village has no industrial or flex space.

COMMERCIAL SPACE MIX
Percent of total square footage by type
2014 2Q
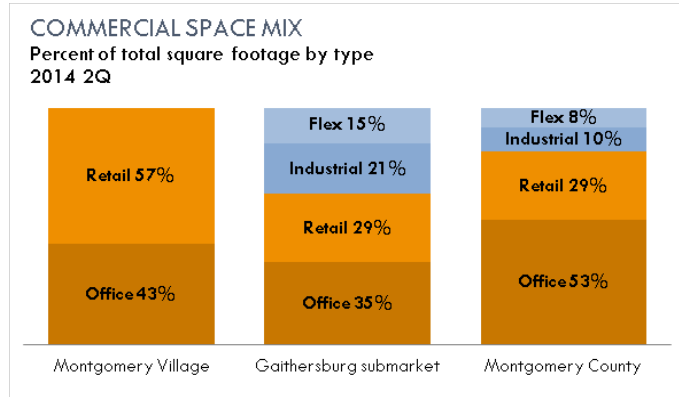
Montgomery Village Master Plan

COMMERCIAL SPACE OVERVIEW

Source: Montgomery County Planning Department analysis of 2Q2014 CoStar data

BUILDINGS	OFFICE	RETAIL	INDUSTRIAL	FLEX	TOTAL
Montgomery County	1,512	2,290	627	282	**4,711**
Gaithersburg submarket	208	330	154	89	**781**
Montgomery Village MPA	22	28	0	0	**50**

SQUARE FOOTAGE	OFFICE	RETAIL	INDUSTRIAL	FLEX	TOTAL
Montgomery County	72,974,838	39,559,302	14,167,270	11,175,484	**137,876,894**
Gaithersburg submarket	7,553,640	6,337,017	4,603,551	3,210,393	**21,704,601**
Montgomery Village MPA	552,891	741,244	0	0	**1,294,135**

UNDER CONSTRUCTION (sf)	OFFICE	RETAIL	INDUSTRIAL	FLEX	TOTAL
Montgomery County	565,048	390,327	0	0	**955,375**
Gaithersburg submarket	0	0	0	0	**0**
Montgomery Village MPA	0	0	0	0	**0**

COUNTY OFFICE SPACE
2014 2Q
n = 72.9 million square feet

Montgomery Village 0.8%
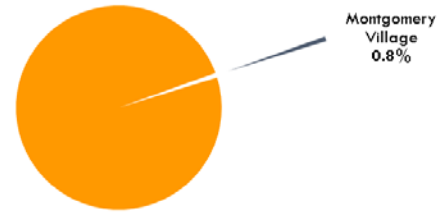
COUNTY RETAIL SPACE
2014 2Q
n = 39.6 million square feet

Montgomery Village 1.90%

- Montgomery Village accounts for 0.8 percent of office space and 1.9 percent of retail space in the county.

- Most commercial space in Montgomery Village is more than 25 years old.

- Nearly 610,000 square feet of retail space (84 percent) was built before 1990.

- Around 635,000 square feet of office space was built before 1990. Only 25,000 square feet of office space has been added in Montgomery Village since 1990.

- Nearly 80 percent of office space in Montgomery Village is lower-quality Class B & C space.
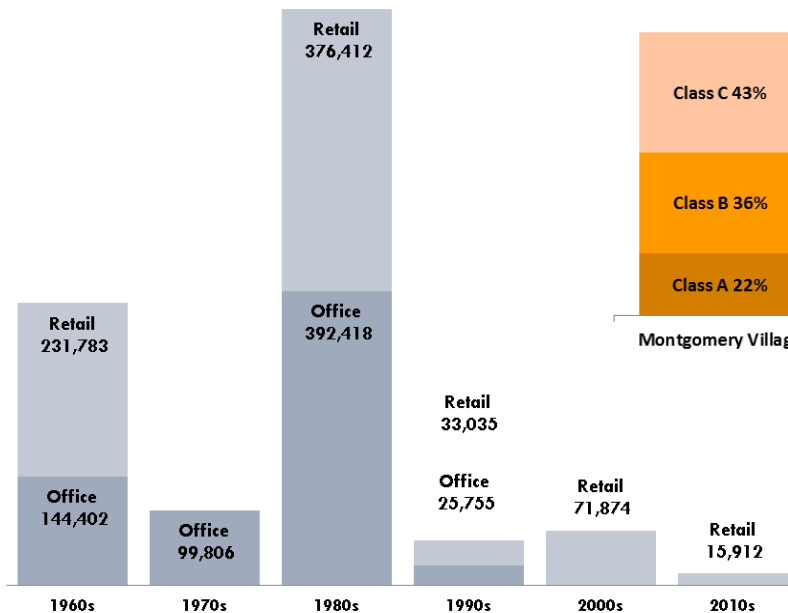
COMMERCIAL SQUARE FOOTAGE BY DECADE BUILT
Montgomery Village Master Plan Area

OFFICE SPACE BY CATEGORY

Retail 376,412
Retail 231,783
Office 392,418
Office 144,402
Office 99,806
Retail 33,035
Office 25,755
Retail 71,874
Retail 15,912

1960s 1970s 1980s 1990s 2000s 2010s

	Montgomery Village	Gaithersburg submarket	Montgomery County
Class C	43%	13%	10%
Class B	36%	55%	41%
Class A	22%	32%	49%

Research Summary
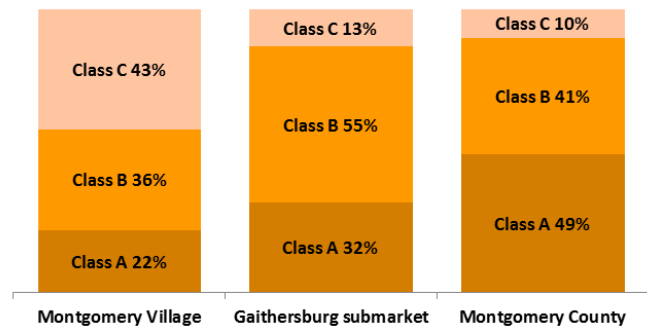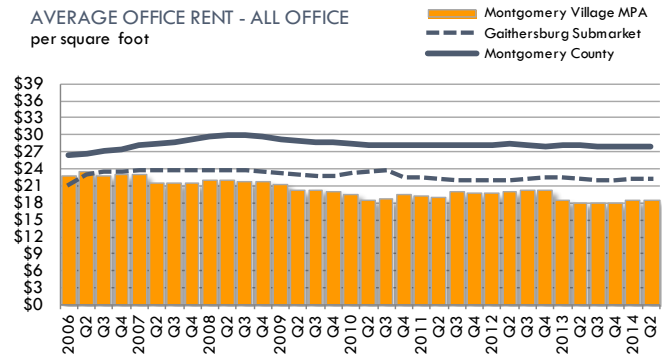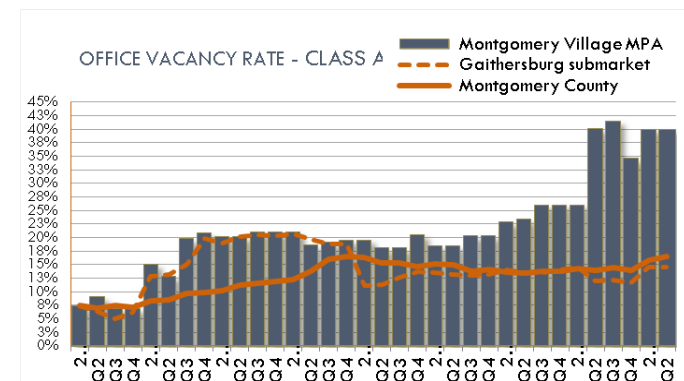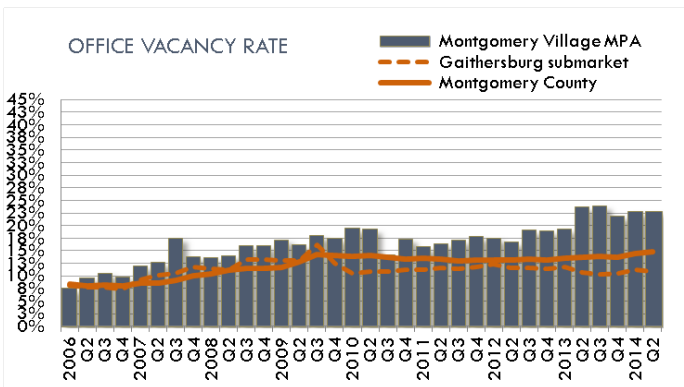
OFFICE MARKET TRENDS

- Office space rents for around $18 per square foot in Montgomery Village, versus $28 Countywide. Class A space rents for around $23 per square foot on average in Montgomery Village, versus $31 Countywide.

- At 23 percent, the office vacancy rate is well above that of the wider Gaithersburg office submarket (11 percent) and the County as a whole (15 percent).

- The vacancy rate for Class A space in Montgomery Village is even higher at 40 percent, versus 15 percent in the surrounding Gaithersburg submarket and 16 percent countywide.

- A soft office market in Montgomery County as a whole and the relatively lower quality of office space in Montgomery Village indicates that there is likely to be very weak demand for existing or new office space in the plan area.

-

AVERAGE OFFICE RENT - ALL OFFICE
per square foot

Legend: Montgomery Village MPA, Gaithersburg Submarket, Montgomery County

AVERAGE OFFICE RENT - CLASS A
per square foot

Legend: Montgomery Village MPA, Gaithersburg Submarket, Montgomery County

OFFICE VACANCY RATE

Legend: Montgomery Village MPA, Gaithersburg submarket, Montgomery County

OFFICE VACANCY RATE - CLASS A

Legend: Montgomery Village MPA, Gaithersburg submarket, Montgomery County

Office Market Snapshot

Montgomery Village Master Plan Area

	2013 2Q	2014 2Q	net change
AVERAGE RENT	$17.96	$18.43	$0.47
VACANCY RATE	21.9%	22.8%	0.9%
AVAILABILITY RATE	17.9%	18.9%	1.0%
NET ABSORPTION	(23,815)	(275)	23,540
INVENTORY			
Buildings	22	22	-
Square Feet	552,891	552,891	-
Vacant Square Feet	130,553	126,235	(4,318)
DELIVERIES			
Buildings	-	-	-
Square Feet	-	-	-
UNDER CONSTRUCTION			
Buildings	-	-	-
Square Feet	-	-	-

Research Summary

RETAIL MARKET TRENDS

- The rental market in Montgomery Village is comparatively stronger than the office market.

- At 4 percent, the retail vacancy rate is below that of the wider Gaithersburg retail submarket and the County as a whole (both 5 percent).

- Even so, nearly 20,000 square feet of retail space was removed from the market in the past year, indicating that there may be limited demand for new retail in Montgomery Village.

Retail Market Snapshot

Montgomery Village Master Plan Area

	2013 2Q	2014 2Q	net change
AVERAGE RENT	$26.84	$29.92	$3.08
VACANCY RATE	4.8%	3.1%	-1.7%
AVAILABILITY RATE	17.9%	18.9%	1.0%
NET ABSORPTION	(12,198)	12,104	24,302
INVENTORY			
Buildings	28	28	-
Square Feet	741,244	741,244	-
Vacant Square Feet	42,404	23,133	(19,271)
DELIVERIES			
Buildings	-	-	-
Square Feet	-	-	-
UNDER CONSTRUCTION			
Buildings	-	-	-
Square Feet	-	-	-

AVERAGE RETAIL RENT
per square foot

Montgomery Village MPA
Gaithersburg Submarket
Montgomery County

RETAIL VACANCY RATE

Montgomery Village MPA
Gaithersburg submarket
Montgomery County

Research Summary