

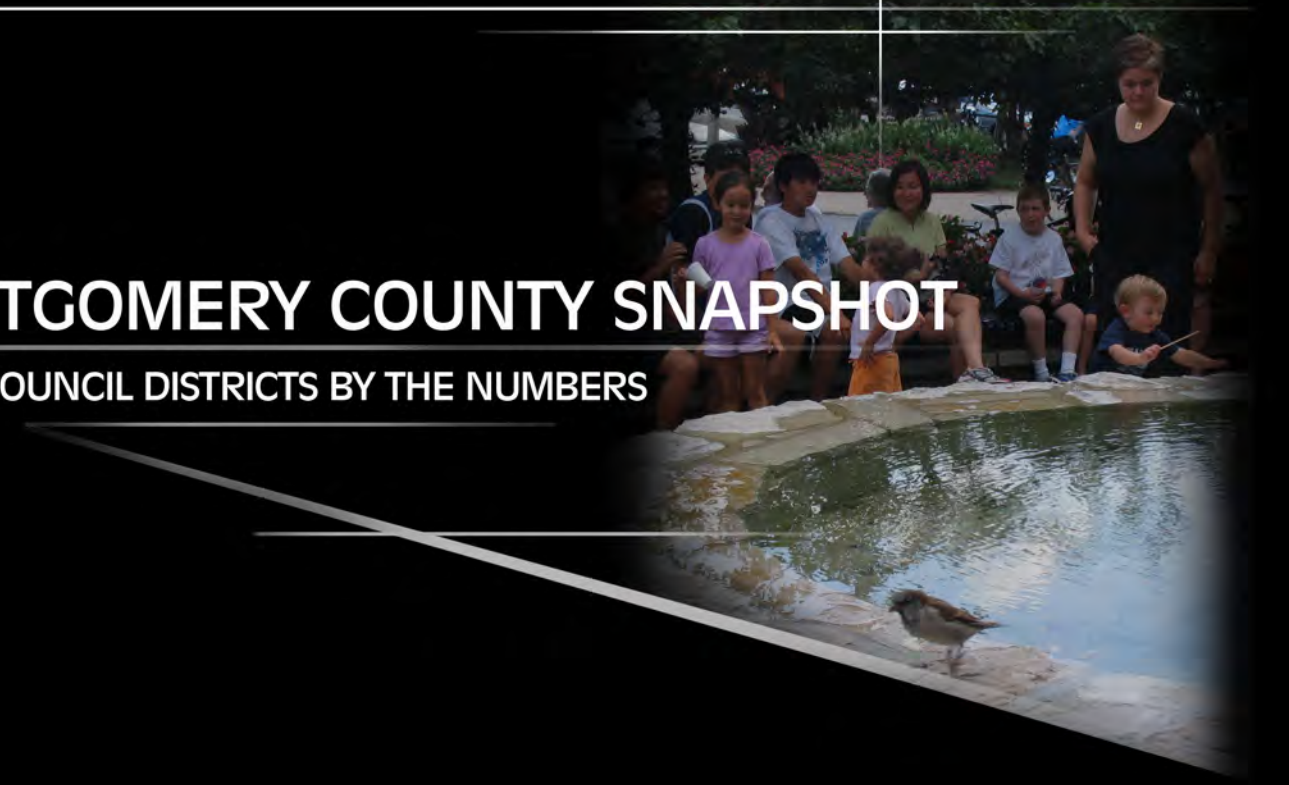
HOUSING UNITS SOLD

	2000	2008	2009		
all housing units	4,101	1,907	2,526	-38%	32%
single-family detached	2,469	1,104	1,262	-49%	14%
townhouses	860	541	586	-32%	8%
condominiums	772	262	678	-12%	159%

+ 82.9 MI
 - 2327 FT
 + 39.69

MONTGOMERY COUNTY SNAPSHOT

COUNCIL DISTRICTS BY THE NUMBERS



MAY 2012

This document contains population and land use information comparing Montgomery County its regional neighbors and comparing its County Council districts.

Source of Copies

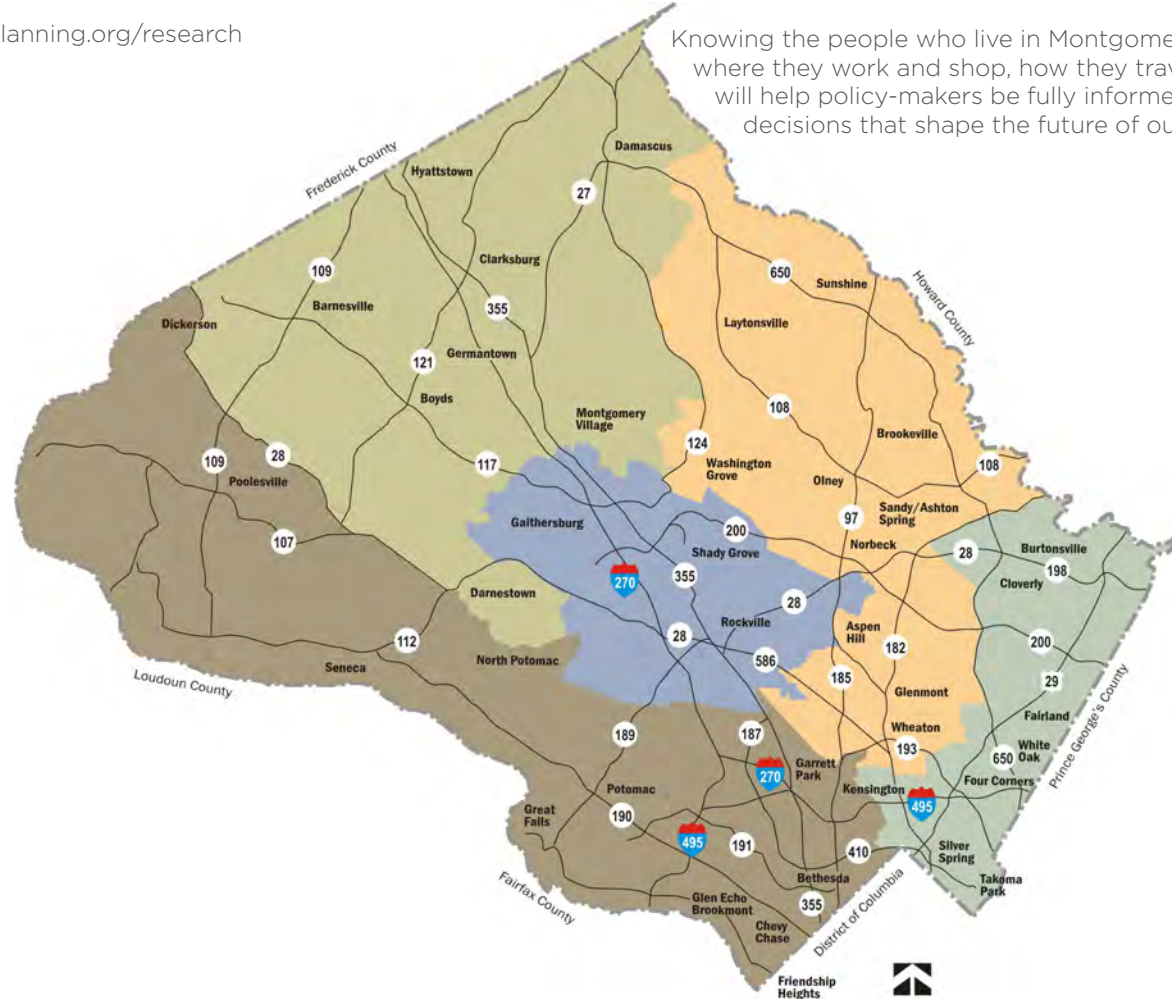
Maryland-National Capital Park and Planning Commission
 8787 Georgia Avenue
 Silver Spring, MD 20910

Online at: MontgomeryPlanning.org/research

The change in County Council districts means changes to the information Council members, government agencies, and the public will need when considering services, infrastructure, and investment decisions. This report is the second edition of the Montgomery County Snapshot and provides the same demographic and economic information.

This snapshot provides countywide information as well as data about each Council district—population trends, household characteristics, employment, housing and retail activity, and more.

Knowing the people who live in Montgomery County, where they work and shop, how they travel, and how they live, will help policy-makers be fully informed as they make the decisions that shape the future of our communities.



contents

At-a-Glance	4	Where We Stand in the Region	17
Population and Households	4	Population	18
Education	4	Income	18
Income	4	Education	18
Housing Costs	4	Jobs	19
Foreign Language Speakers	4	Unemployment	19
Employment	4	Retail Activity	20
Unemployment	4	Office Space	20
Gross County Product	4		
Home Sales	5	Countywide Snapshot	21
Residential Foreclosures	5	Demographics	22
Retail Activity	5	Employment	25
Office Leasing Activity	5	Housing	27
Office Development Activity	5	Transportation Costs	29
Development Pipeline	5	Walk Score	30
		Retail	30
Side-by-Side Look at Council Districts	7	Office	34
Household Population	8	Development Activity	35
Education	8		
Income	9	Council Districts	39
Race and Ethnicity	9	District 1	40
Foreign Language Speakers	9	District 2	50
Work Location	10	District 3	60
Jobs	10	District 4	70
Employers	10	District 5	80
Median Housing Prices	11		
Housing Units Sold	11		
Consumer Retail Spending	13		
Retail Sales	13		
Retail Gap	13		
Assessed Value	14		
Land Area	14		
Residential Land	14		
Commercial and Industrial Land	14		
Open Space	14		
Residential Pipeline	15		
Nonresidential Pipeline	15		

POPULATION AND HOUSEHOLDS

- Montgomery County has a total population of 971,777 persons, up 98,436 (11.3 percent) from 2000.
- 225,956 additional County residents are forecasted between 2010 and 2040, a 24 percent increase.
- 100,439 new households are expected between 2010 and 2040, a 28 percent increase.
- Between 2000 and 2010, average household size increased from 2.66 persons per household to 2.70 persons per household. However, average household size is expected to revert to the national trend and decline to 2.57 by 2040.

EDUCATION

- Montgomery County is tied with Howard County, MD for first among large counties nationwide in educational attainment, with 30 percent of residents having earned an advanced degree.

INCOME

- At \$89,155, Montgomery County's median household income is nearly five percent lower than in 1999, when it was \$93,627 adjusted for inflation. The County ranks fifth in the Washington, D.C. metro area and ninth nationwide in median household income.
- The share of County households making more than \$200,000 per year nearly doubled from eight percent in 2000 to 15 percent in 2010.
- Over the same period, households making less than \$50,000 per year fell from 32 percent to 27 percent of all households in the County.

HOUSING COSTS

- The percentage of homeowners who spent more than 30 percent of their income on mortgaged housing costs increased from 15 percent in 2000 to 37 percent in 2010.
- For renters, the share of cost-burdened households rose from 35 percent in 2000 to 54 percent in 2010.

FOREIGN LANGUAGE SPEAKERS

- 39 percent of County residents ages five and up speak a language other than English at home.

EMPLOYMENT

- In March 2011, there were 510,000 jobs in Montgomery County compared to 474,000 jobs in 2000 and 500,000 jobs in 2005.

UNEMPLOYMENT

- County unemployment was at its peak during 2010 at 5.6%, with 27,870 residents out of work.
- County unemployment improved in October 2011 at 5.2% with 26,820 residents out of work, 1,050 more employed residents than October 2010.

GROSS COUNTY PRODUCT

- Gross County Product—total earnings by all industries in the County—rose from an estimated \$46.1 billion in 2009 to \$47.8 billion in 2010, a 3.6 percent increase, versus a 0.8 percent increase between 2008 and 2009.

at

HOME SALES

- The 2010 median sales price of a single-family detached house was \$455,000—a one percent increase from the 2009 median price of \$452,299.
- The median price for a single-family attached house dropped three percent over the same period from \$277,478 in 2009 to \$270,000 in 2010.
- The median price for single-family detached homes dropped 23 percent and single-family attached homes dropped 29 percent between the peak of the market in 2007 and 2010.
- In 2010, fifty-five percent of all sales were single-family detached homes, 21 percent were single-family attached homes, and 24 percent were multifamily homes. The volume of sales fell by eight percent from 23,424 homes in 2009 to 21,656 homes in 2010.

RESIDENTIAL FORECLOSURES

- As of December 31, 2010, 1,951 foreclosed houses were auctioned in 2010, compared to 1,427 homes in 2009 and 1,946 homes in 2008.

RETAIL ACTIVITY

- Retail spending by County residents totaled \$18.3 billion in 2011, an eight percent increase over 2010 but below the \$19.0 billion spent in 2008.
- Sales by County retail establishments totaled \$14.8 billion in 2011, a four percent increase over 2010 but below the \$18.0 billion in sales in 2008.

OFFICE LEASING ACTIVITY

- The County's office vacancy rate reached a five-year peak of 14.3 percent in 2010, but fell to 13.9 percent in 2011. Reflecting the continuing impact of the recession, the 2011 office vacancy rate is a full 4.6 percentage points above the 9.3 percent annual average posted in 2007.
- Average office rents reached a five-year low of \$28.20 per square foot in 2010, but rose slightly to \$28.24 in 2011. The 2011 average is 5.2 percent below their five-year peak of \$29.79 per square foot in 2008, but close to the \$28.55 per square foot average rent in 2007.
- Rents for Class A office space ranged from \$12 to \$50 per square foot in the County as of the 4th quarter of 2011.

OFFICE DEVELOPMENT ACTIVITY

- No office space was delivered during 2011, versus 128,000 square feet delivered during 2010. There were 751,000 square feet of office space under construction as of the 4th quarter of 2011.

DEVELOPMENT PIPELINE

- The Residential Pipeline has decreased three percent from 17,307 dwelling units in May 2011 to 16,799 units in November 2011.
- The Nonresidential Pipeline has increased three percent from 19.6 million gross floor area (GFA) in May 2011 to 20.2 million GFA in November 2011.
- Council District 3 added 520,000 GFA with the approval of the Parklawn North project. District 4 added 99,800 GFA with the approval of 1st Baptist Church of Wheaton and the Kensington Nursing projects.

a glance

SIDE BY SIDE

LOOK AT COUNCIL DISTRICTS

05.2012
MONTGOMERY COUNTY



DISTRICT 1



DISTRICT 2



DISTRICT 3



DISTRICT 4



DISTRICT 5

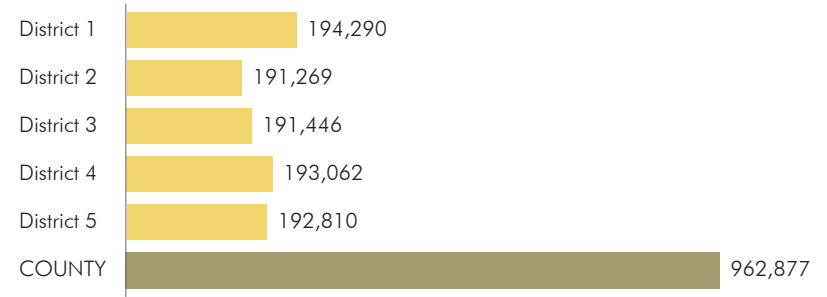
HOUSEHOLD POPULATION

- District 1 ranks first in household population, with 194,290 residents. With 191,269 residents, District 2 has the smallest population.
- District 2 had the largest increase in household population, adding 32,916 residents (21 percent) from 2000 to 2010. District 5 grew by six percent, with 11,729 new residents since 2000.

EDUCATION

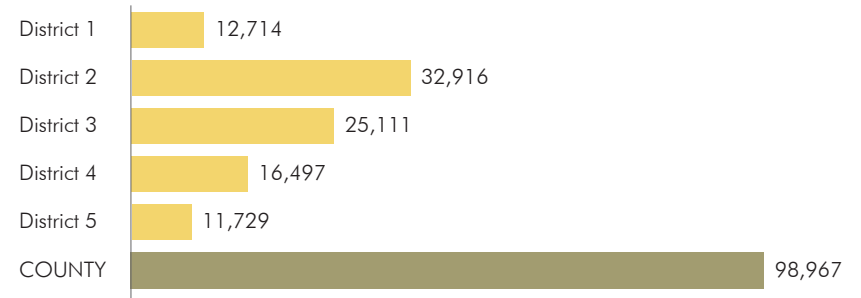
- All five Council districts boast a level of educational attainment far above the national average.
- Almost half of adults ages 25 and older in each district have a bachelor’s degree or higher, compared to 28 percent of adults nationwide.
- District 1 residents are exceptionally well-educated, with almost half (48 percent) of adults ages 25 and older having earned an advanced degree.
- District 4 has the largest share (14 percent) of adult residents ages 25 and older who have not finished high school, matching the nationwide average.

2010 HOUSEHOLD POPULATION



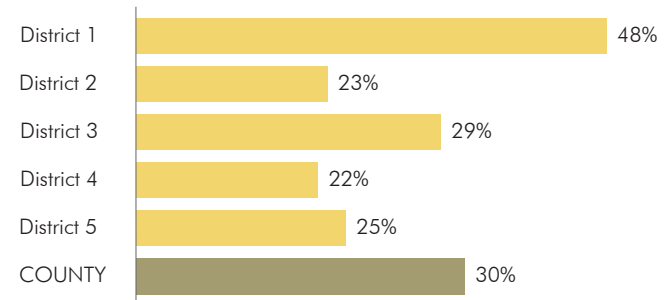
Source: U.S Census Bureau, 2010 U.S. Census

2000-2010 GROWTH IN HOUSEHOLD POPULATION



Source: U.S Census Bureau, 2000 and 2010 U.S. Census

2010 RESIDENTS WITH GRADUATE DEGREES



Source: U.S Census Bureau, 2010 U.S. Census

INCOME

- District 1 is the most affluent of the five Council districts, with a median household income of \$144,098.
- District 5 ranks last in the County with a median household income of \$81,478 - which is 63% higher than the national median of \$50,046.

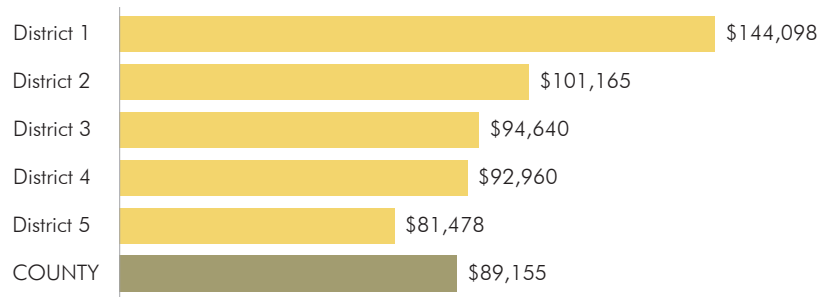
RACE AND ETHNICITY

- District 1 has the largest proportion of non-Hispanic White residents (75 percent).
- District 2's minority population base is almost evenly divided among Black/African American, Hispanic/Latino, and Asian residents.
- District 3 has the largest concentration of residents of Asian ancestry (19 percent).
- District 4 has the largest proportion of Hispanic/Latino residents (23 percent).
- District 5 has the largest share of Black/African American residents (32 percent).

FOREIGN LANGUAGE SPEAKERS

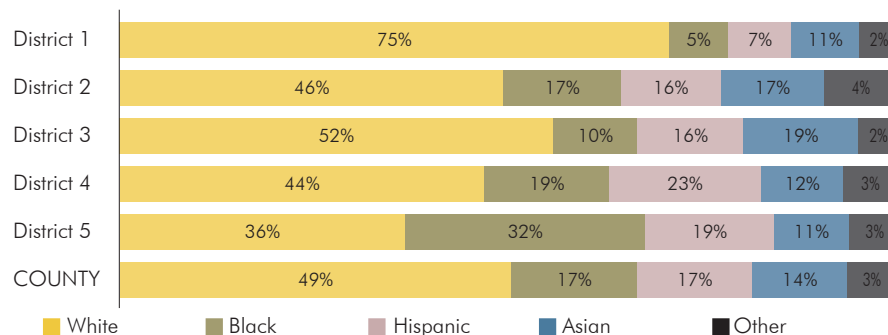
- More than a quarter of the residents ages five and up in each district speak a foreign language at home. The majority of foreign language speakers in each district are fluent in English.
- Districts 3 and 4 have the largest concentration of foreign language speakers (42 percent), and the largest percentage of residents who are not English-proficient (18 and 19 percent, respectively).
- Foreign language speakers make up a relatively small share (27 percent) of District 1's population. Eight percent of its residents are not fluent in English.

2010 MEDIAN HOUSEHOLD INCOME



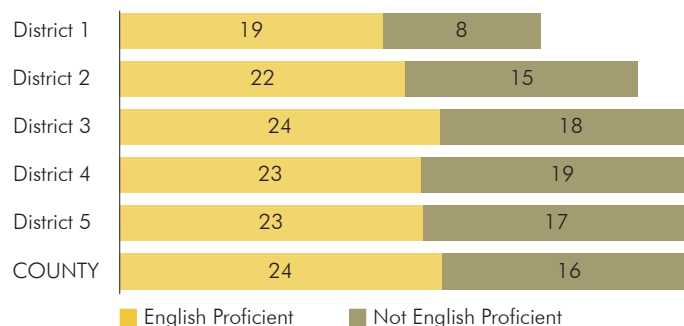
Source: U.S. Census Bureau, 2006-2010 and 2010 American Community Survey

2010 RACE AND ETHNICITY



Source: U.S. Census Bureau, 2006-2010 and 2010 American Community Survey

2010 SHARE OF RESIDENTS AGES 5+ WHO SPEAK A FOREIGN LANGUAGE AT HOME



Source: U.S. Census Bureau, 2006-2010 and 2010 American Community Survey

WORK LOCATION

- The share of over 500,000 employed residents is equally distributed across the five Council Districts.
- District 2, centrally located, has the highest percentage of residents (73 percent) living and working in the County. The lowest share of employed residents working in Montgomery is 46 percent in District 5.
- District 1, bordering Washington, D.C. and Virginia, has the highest percentage of employed residents (43 percent) working outside of Maryland.

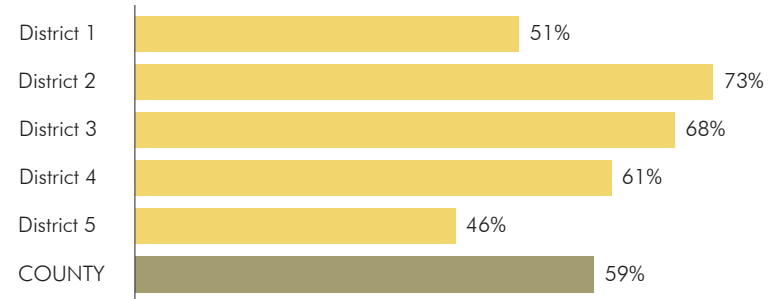
JOBS

- District 1 is the leading job destination in Montgomery County, with 35 percent of the total job base.
- District 3 follows closely with 31 percent of all jobs Countywide.
- District 2 trails far behind with only 8 percent of total employment in the County.

EMPLOYERS

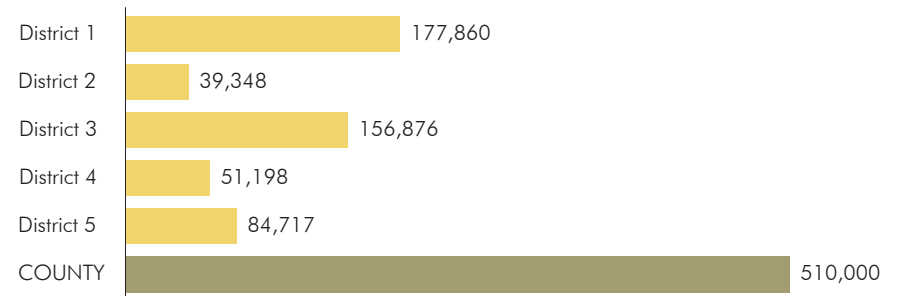
- District 1 accounts for the largest share (38 percent) of employers Countywide, with 13,335 establishments.
- District 3 ranks second in the number of employers, with 8,449 establishments.
- District 2 has the smallest share (10 percent) of all establishments in the County, with 3,322 employers.

2010 EMPLOYED COUNTY RESIDENTS



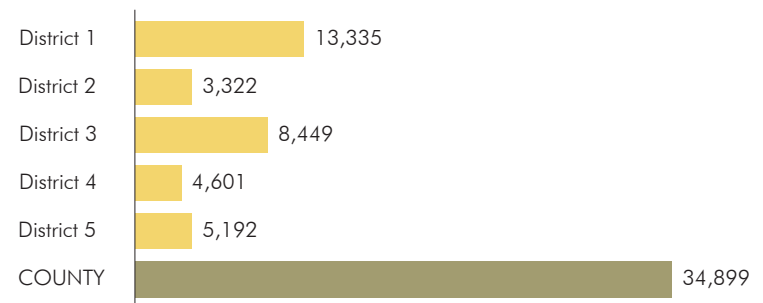
Source: U.S Census Bureau, Source: U.S Census Bureau, 2006-2010 and 2010 American Community Survey

2010 JOBS



Source: U.S. Bureau of Labor Statistics (BLS), Quarterly Census of Earnings and Wages data

2010 JOB ESTABLISHMENTS



Source: U.S. Bureau of Labor Statistics (BLS), Quarterly Census of Earnings and Wages data

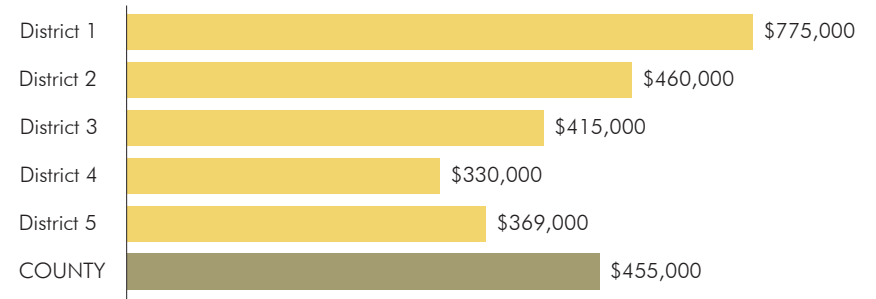
MEDIAN HOUSING PRICES

- District 1 had the highest median price for single-family attached houses (\$578,750) and single-family detached houses (\$775,000).
- District 4 had the most affordable single-family detached houses (median price \$330,000) and District 2 with the most affordable single-family attached homes (median price \$220,000).
- Median price of single-family detached houses only increased in District 1 (2 percent) and remained constant in District 2 and District 5 between 2009 and 2010. Median price dropped in District 3 (3 percent) and District 4 (4 percent).
- Median prices in all districts remain lower in 2010 than at the peak of the market in 2007. Median prices in District 4 experienced the largest decline in single-family detached home sales (31 percent) from \$342,258 in 2007 to \$330,000 in 2010. District 1 median prices fared the best with a 13 percent decline, from \$890,766 in 2007 to \$775,000 in 2010.

HOUSING UNITS SOLD

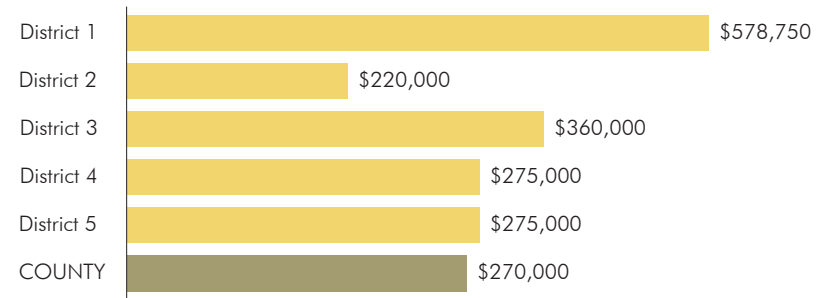
- District 1 ranked first in the number of single-family detached house sales (3,640) in 2010, accounting for 31 percent of single-family detached house sales Countywide.
- District 2 had the most single-family attached house sales, with 2,029 units sold in 2010, accounting for 45 percent of single-family attached house sales Countywide.
- District 5 accounted for the largest share of multifamily house sales, with 2,044 units sold in 2010, accounting for 39 percent of multifamily house sales Countywide.
- Volume of sales for single-family detached homes and single-family attached homes increased in all Districts from 2009.
- District 2 saw the largest increase in sales volume between 2009 and 2010 (36 percent). Conversely, District 3 saw the greatest drop in sales volume during the same period (31 percent).

SINGLE-FAMILY DETACHED HOUSE 2010 MEDIAN SALES PRICE



Source: Montgomery County Planning Department Land Use Database

SINGLE-FAMILY ATTACHED HOUSE 2010 MEDIAN SALES PRICE



Source: Montgomery County Planning Department Land Use Database

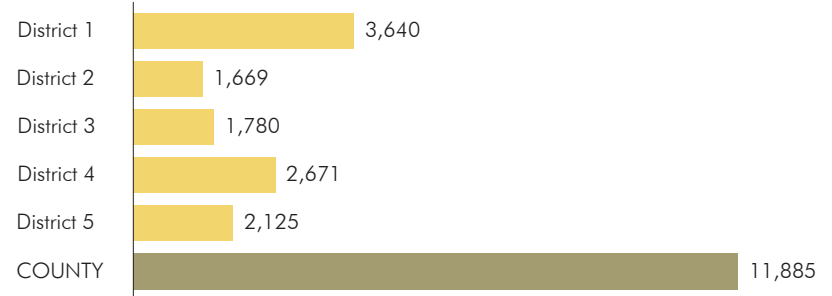
2009-2010 CHANGE IN ANNUAL HOUSING UNITS SOLD

	single-family detached	single-family attached	multifamily
District 1	20%	20%	-44%
District 2	12%	15%	N/A
District 3	3%	0%	-57%
District 4	20%	20%	-77%
District 5	9%	13%	-33%
COUNTY	14%	12%	-42%

Source: Montgomery County Planning Department Land Use Database

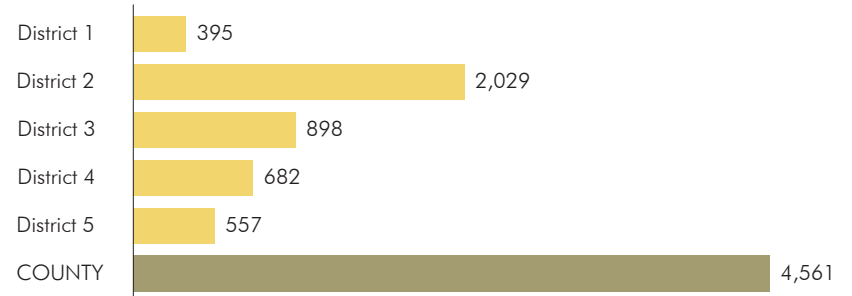


2010 SINGLE-FAMILY DETACHED HOUSE UNITS SOLD



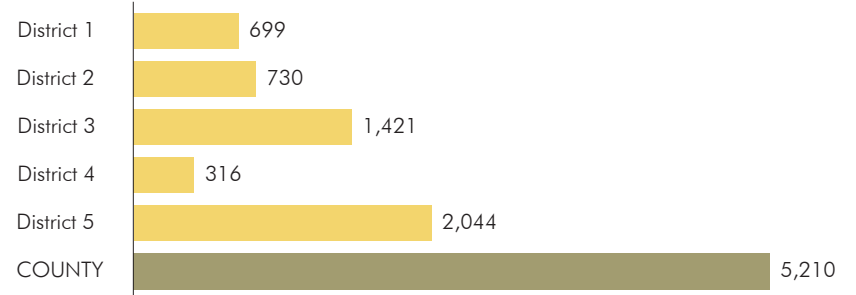
Source: Montgomery County Planning Department Land Use Database

2010 SINGLE-FAMILY ATTACHED HOUSE UNITS SOLD



Source: Montgomery County Planning Department Land Use Database

2010 MULTIFAMILY UNITS SOLD



Source: Montgomery County Planning Department Land Use Database

CONSUMER RETAIL SPENDING

- District 1 had the highest level of consumer spending, at \$4.57 billion, 25 percent of total spending by County residents.
- District 5 residents accounted for the lowest share (18 percent) of spending Countywide, with \$3.29 billion.

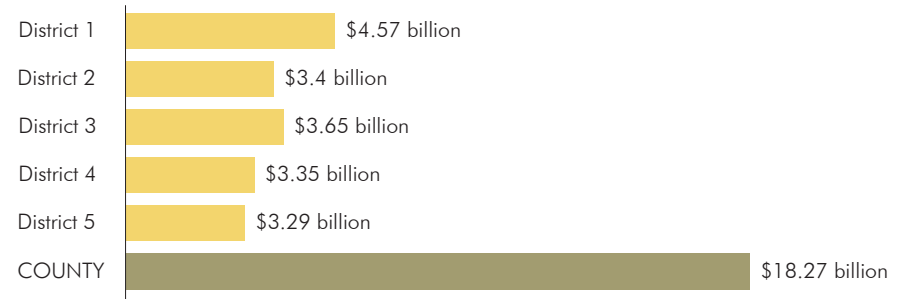
RETAIL SALES

- District 3 was the top retail destination in 2011, with \$5.06 billion in retail sales, accounting for 34 percent of sales Countywide.
- District 4 had the lowest sales overall, with \$1.71 billion, 12 percent of retail sales Countywide.

RETAIL GAP

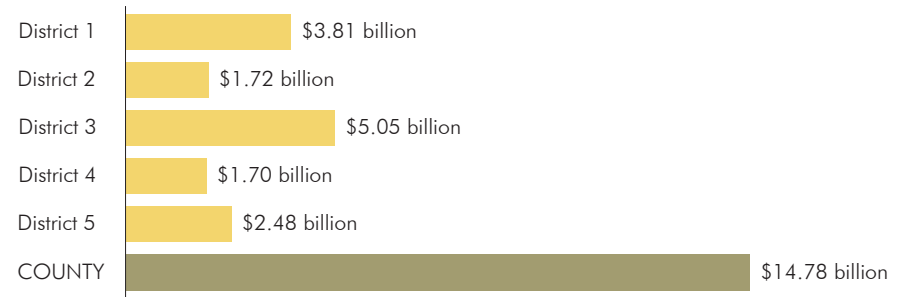
- District 3 was the only Council district with a retail surplus in 2011, with retail sales outpacing spending by district residents by \$1.41 billion.
- Retail capture rates in District 2 and District 4 (both 51 percent) are well below the Countywide rate of 81 percent. This presents retailers with an opportunity to locate or expand closer to consumers in these districts.

2011 CONSUMER SPENDING



Source: Montgomery County Planning Department analysis of 2011 Claritas SiteReports data

2011 RETAIL SALES



Source: Montgomery County Planning Department analysis of 2011 Claritas SiteReports data

RETAIL ACTIVITY (IN BILLIONS)

	consumer spending	retail sales	capture rate	unmet consumer demand	retail surplus
District 1	\$4.57	\$3.82	83%	\$0.756	
District 2	\$3.40	\$1.72	51%	\$1.684	
District 3	\$3.65	\$5.06	138%		\$1.406
District 4	\$3.35	\$1.71	51%	\$1.642	
District 5	\$3.29	\$2.48	75%	\$0.812	
COUNTY	\$18.27	\$14.79	81%	\$3.485	

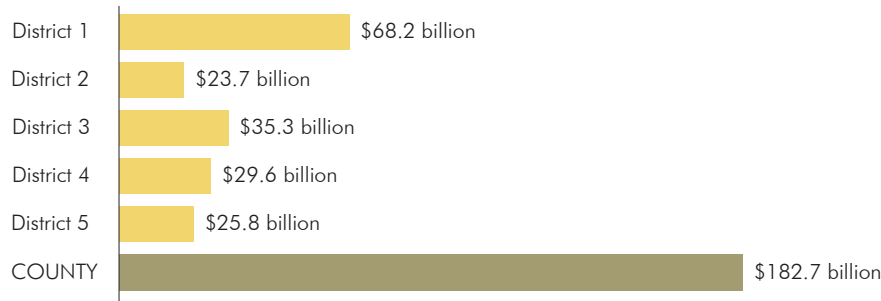
Source: Montgomery County Planning Department analysis of 2011 Claritas SiteReports data

side-by-side look at council districts

ASSESSED VALUE

- With residential and nonresidential properties assessed at \$68.2 billion, District 1 accounts for an overwhelming share (37 percent) of total assessed value in the County.
- District 2 has the smallest share (13 percent) of the property tax base, with \$23.7 billion in assessed value.
- District 3 has the lowest proportion of its property tax base (67 percent) from residential sources, with nonresidential sources supplying 33 percent.
- District 4 has the highest share (81 percent) of total assessed value from residential sources, with nonresidential sources supplying 19 percent of the property tax base.

TOTAL ASSESSED VALUE



Source: Montgomery County Planning Department, 2010

ASSESSED VALUE BY PROPERTY TYPE

	all properties	residential buildings	residential land	nonresidential buildings	nonresidential land
District 1	\$68,220,390,410	38%	42%	12%	8%
District 2	\$23,720,897,390	46%	34%	11%	9%
District 3	\$35,333,771,630	34%	33%	22%	11%
District 4	\$29,592,259,015	36%	45%	8%	10%
District 5	\$25,840,395,870	34%	43%	13%	10%
COUNTY	\$182,707,714,315	38%	40%	13%	10%

Source: Montgomery County Planning Department, 2010

LAND AREA

- District 1 and 2 are essentially tied for largest districts in terms of land area with 92,563 acres and 92,750 acres (29 percent) of total land Countywide, respectively.
- District 5 has the smallest land area, with 29,112 acres—nine percent of total land Countywide.

RESIDENTIAL LAND

- In all districts, residentially-zoned land accounts for less than half of their total areas, except for District 5 (51percent)
- District 5 has the largest share of residentially-zoned land (51 percent), while District 2 has the smallest share (21 percent). District 3 is second with 44 percent, while Districts 1 and 4 are tied for third (35 and 33 percent respectively).

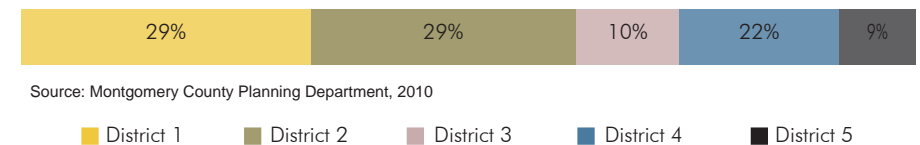
COMMERCIAL AND INDUSTRIAL LAND

- District 3 has the largest share (21 percent) of land zoned for commercial (office and retail), industrial, or mixed use, followed by District 2 (8 percent).
- District 1 has the smallest percentage of total land area zoned for commercial/industrial/mixed use (3 percent).

OPEN SPACE

- Containing the bulk of the Agricultural Reserve, District 2 has the largest share (67percent) of land zoned for agricultural or park use.
- District 3 had the smallest percentage of land zoned for agricultural or park uses (20 percent).

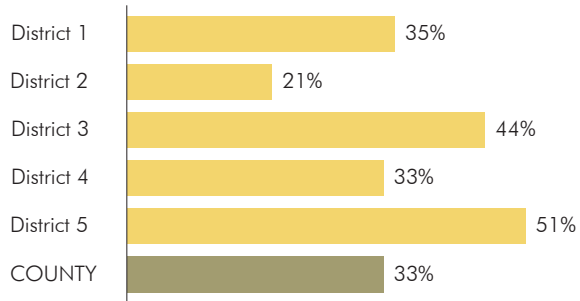
SHARE OF TOTAL LAND AREA IN COUNTY



Source: Montgomery County Planning Department, 2010

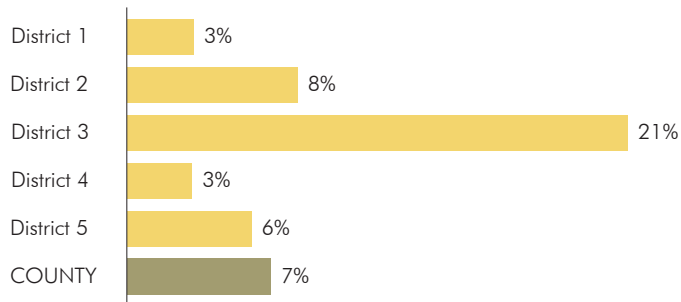
■ District 1 ■ District 2 ■ District 3 ■ District 4 ■ District 5

PERCENT OF LAND IN DISTRICT ZONED FOR RESIDENTIAL USE



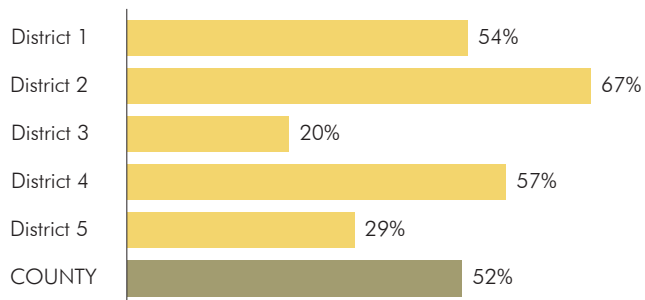
Source: Montgomery County Planning Department, 2010

PERCENT OF LAND IN DISTRICT ZONED FOR COMMERCIAL, INDUSTRIAL, OR MIXED USE



Source: Montgomery County Planning Department, 2010

PERCENT OF LAND IN DISTRICT ZONED FOR AGRICULTURAL OR PARK USE



Source: Montgomery County Planning Department, 2010

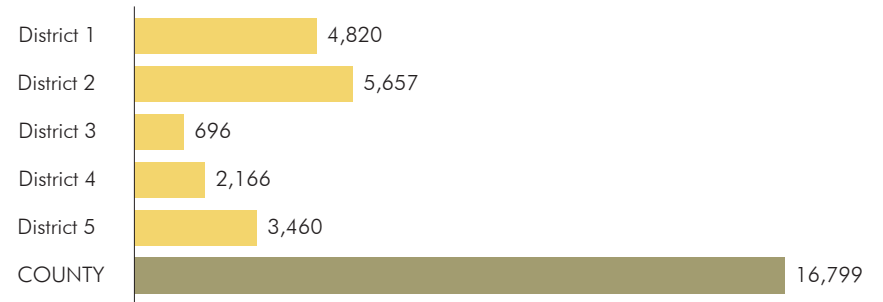
RESIDENTIAL PIPELINE

- District 2 has the largest share (33 percent) of residential development remaining in the pipeline, with 5,657 approved and unbuilt units in 61 projects as of November 2011.
- District 3 has the fewest number of residential units in the pipeline, with 696 units in 17 projects.

NONRESIDENTIAL PIPELINE

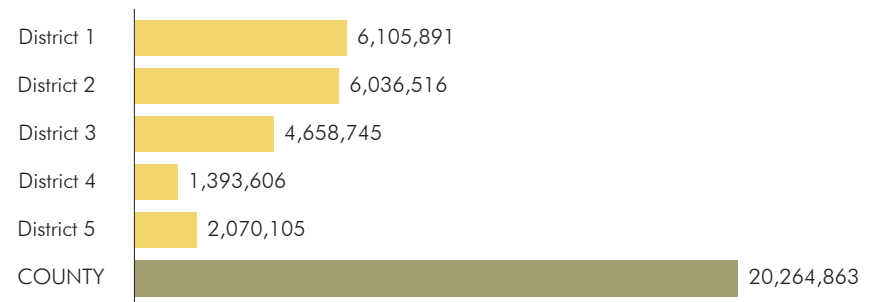
- The largest share (30 percent) of approved and unbuilt commercial space is in District 1, with 6.1 million square feet in 29 projects.
- District 4 has the smallest share (7 percent) of commercial space remaining in the pipeline, with 1.4 million approved and unbuilt square feet in 21 projects.

APPROVED RESIDENTIAL UNITS REMAINING TO BE BUILT



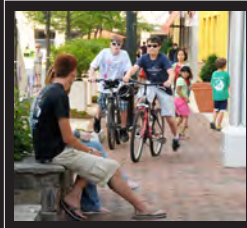
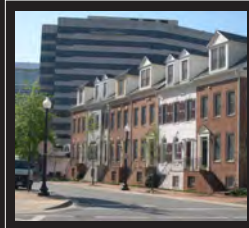
Source: Montgomery County Planning Department, 2010

APPROVED NON-RESIDENTIAL SQUARE FOOTAGE REMAINING TO BE BUILT



Source: Montgomery County Planning Department, 2010

05.2012
MONTGOMERY COUNTY



WHERE WE STAND

POPULATION

- Montgomery County is the second largest jurisdiction in the region, accounting for 17 percent of total population in the Washington, D.C. metro area.
- Montgomery ranks 42nd in population among counties nationwide.

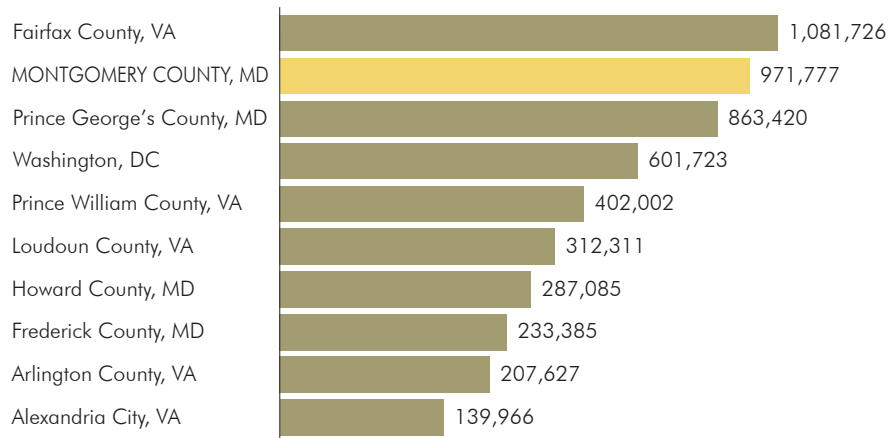
INCOME

- Montgomery County ranks among the six wealthiest counties in the Washington, D.C. region and ninth nationwide in median household income.
- At \$89,155, the County's 2010 median household income is 5 percent lower than the inflation-adjusted \$93,627 median in 1999.

EDUCATION

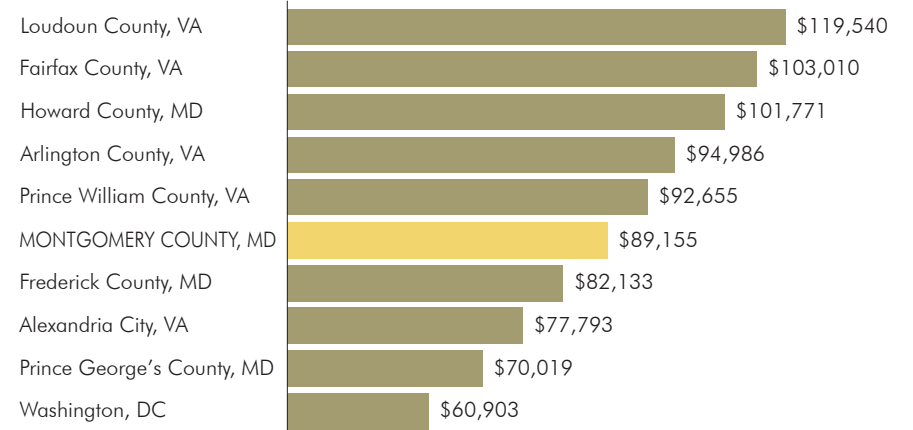
- Montgomery County ranks second in the Washington, D.C. region in the share of adults 25 and older who have earned an advanced degree (30 percent). Among counties with 250,000 or more residents, Montgomery County ranked first nationwide, just ahead of Howard County.
- One in four (24 percent) of the region's most highly educated residents live in Montgomery County.

2010 TOTAL POPULATION



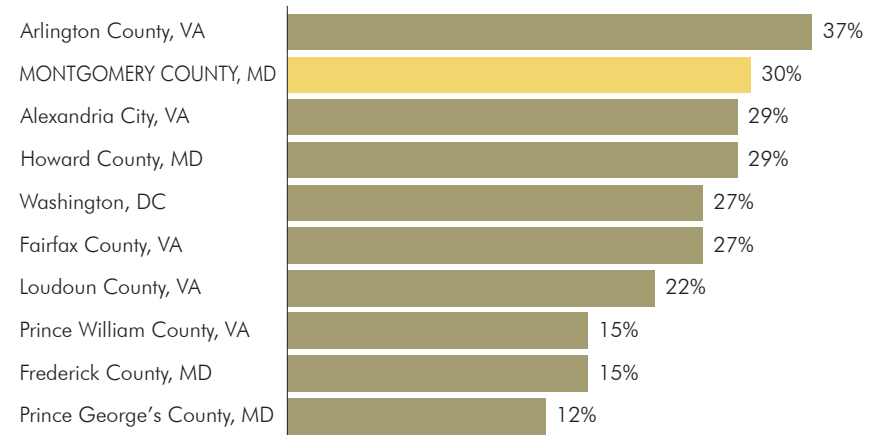
Source: U.S. Census, 2010 Decennial Census

2010 MEDIAN HOUSEHOLD INCOME IN PAST YEAR



Source: U.S. Census, 2010 American Community Survey

2010 RESIDENTS WITH ADVANCED DEGREES



Source: U.S. Census, 2010 American Community Survey

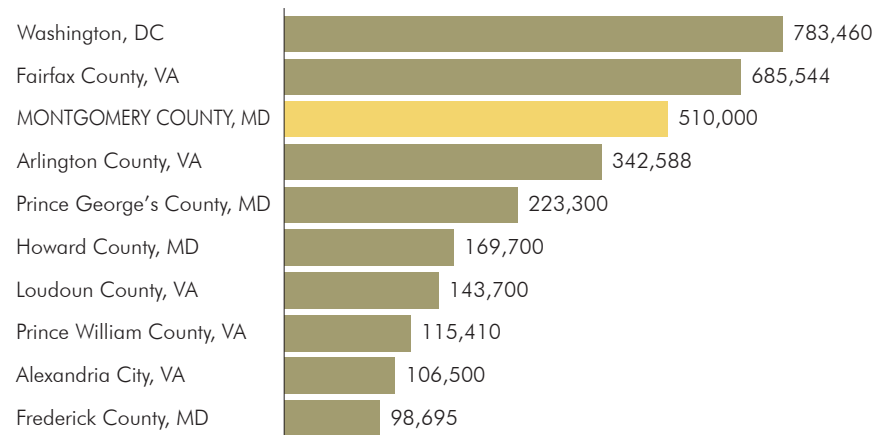
JOBS

- Montgomery County has the third largest employment base in the Washington metro area, with 510,000 jobs.
- The County accounts for 16 percent of all jobs in the Washington, D.C. metro area.
- The District of Columbia is the region's largest job center, employing 783,460 people. Fairfax County (including the cities of Fairfax and Falls Church) is second with 685,544 jobs.

UNEMPLOYMENT

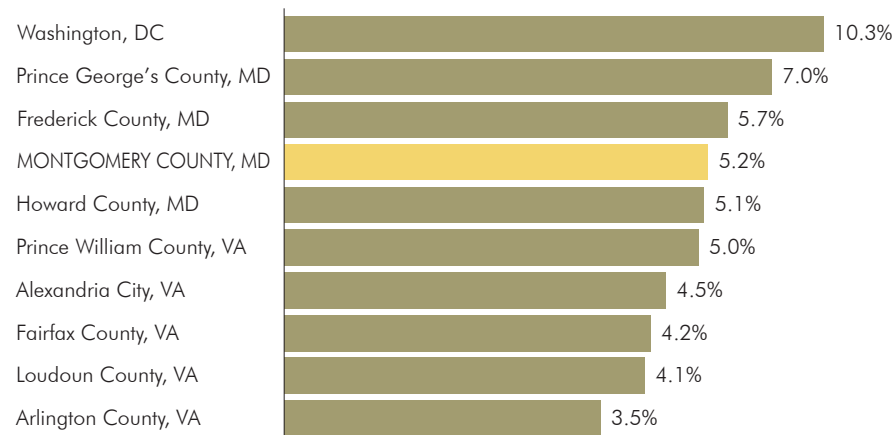
- In October 2011, the national unemployment rate was 8.5 percent.
- That same month, unemployment in Montgomery County was the second lowest in the State of Maryland at 5.2 percent, just above Howard County at 5.1 percent. Unemployment was 6.8 percent in the state as a whole.
- Montgomery County's unemployment rate is below the region's rate (5.7 percent.)
- Washington, D.C. has the region's highest level of unemployed residents at 10.3 percent. Arlington County has the region's lowest unemployment, at 3.5 percent.

2011 EMPLOYMENT



Source: Metropolitan Washington Council of Government Round 8.1 2011 Forecast, U.S. Bureau of Labor Statistics

OCTOBER 2011 UNEMPLOYMENT



Source: Metropolitan Washington Council of Government Round 8.1 2011 Forecast, U.S. Bureau of Labor Statistics

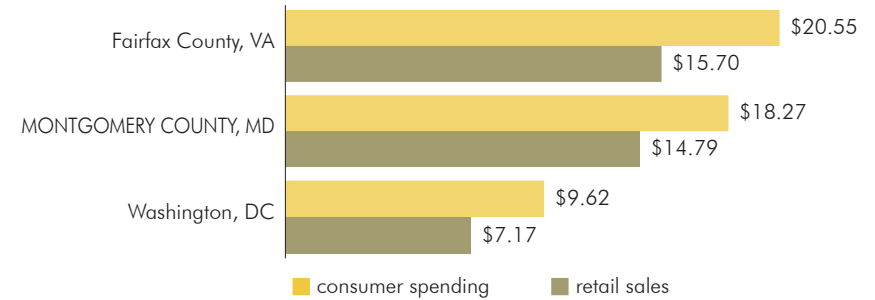
RETAIL ACTIVITY

- Overall, Montgomery County retailers captured a relatively higher proportion of spending by County residents (81 percent) compared to both Fairfax County (76 percent) and the District of Columbia (75 percent) in 2011.
- Montgomery County residents spent a total of \$18.3 billion in 2011, \$2.3 billion less than total spending in Fairfax County (\$20.55 billion).
- Because Fairfax County has a larger population base, per capita retail spending is only slightly lower in Montgomery County (\$18,805) versus Fairfax County (\$18,993).
- Montgomery County retailers had total sales of \$14.8 billion in 2011, \$900 million less than Fairfax County's \$15.7 billion in retail sales.
- With a smaller population base than Fairfax County, Montgomery County's per capital retail sales(\$15,219) were above per capita sales in Fairfax County (\$14,517).

OFFICE SPACE

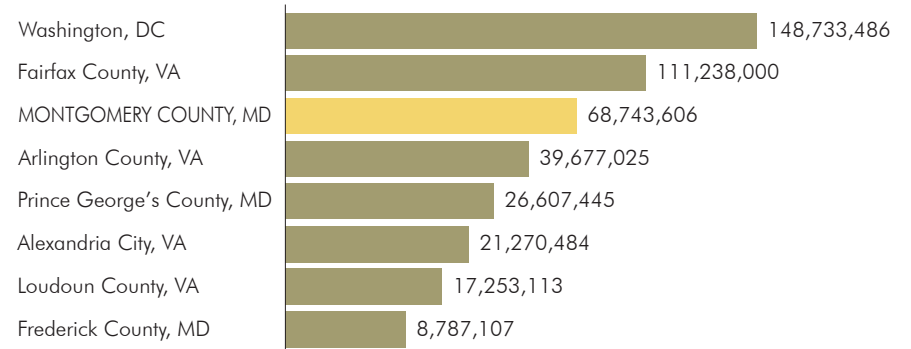
- Montgomery County ranks third among metro region counties in the amount of existing office space, with 68.7 million square feet.
- The County also ranks third in the amount of office space under construction as of the 4th quarter of 2011.
- Average 2011 office rents were fifth highest in the region, at \$28.24 per square foot. This was down a notch from last year, as Fairfax County moved ahead of Montgomery County with office rents rising from \$27.80 to \$28.32 per square foot. Office space in downtown Washington, D.C. rented for \$48.55 per square foot in 2011, the highest in the region.
- At 13.9 percent, office vacancies are fourth highest in the region. Loudoun County had the highest average vacancy rate in 2011, at 17.3 percent.
- Vacancy rates in Montgomery County have nearly returned to the level they were at in 2009. Average rents declined from \$28.89 in 2009 to \$28.24 in 2011.

2011 RETAIL ACTIVITY (IN BILLIONS)



Source: Montgomery County Planning Department analysis of 2011 Claritas SiteReports data

2011 OFFICE SQUARE FOOTAGE



Source: Montgomery County Planning Department analysis of 4th quarter 2011 CoStar data



COUNTYWIDE SNAPSHOT

05.2012
MONTGOMERY COUNTY

demographics

POPULATION AND HOUSEHOLDS

- In April 2010, Montgomery County had a total population of 971,777 persons, up 177 (.02 percent) from 2009 and 98,436 (11 percent) from 2000.
- 225,956 additional household residents are forecasted between 2010 and 2040, a 24 percent increase.
- 100,439 new households are forecasted between 2010 and 2040, a 28 percent increase.
- Average household size was 2.70 persons per household in 2010, up from 2.66 in 2000. As the population ages and housing preferences change, the County will see a trend toward smaller households. By 2040, average household size is forecasted to fall to 2.57 persons per household.

TOTAL POPULATION



Source: U.S Census Bureau, 2000 U.S. Census; 2009 American Community Survey; 2010 U.S. Census

HOUSEHOLD POPULATION FORECAST, 2010-2040

household population		
2010	959,667	
2015	1,001,386	4.3%
2020	1,051,149	5.0%
2025	1,093,267	4.0%
2030	1,136,423	3.9%
2035	1,167,742	2.8%
2040	1,185,623	1.5%
forecasted growth	225,956	
percent forecasted growth	24%	

Montgomery County Planning Department Round 8.1 Cooperative Forecast

HOUSEHOLDS



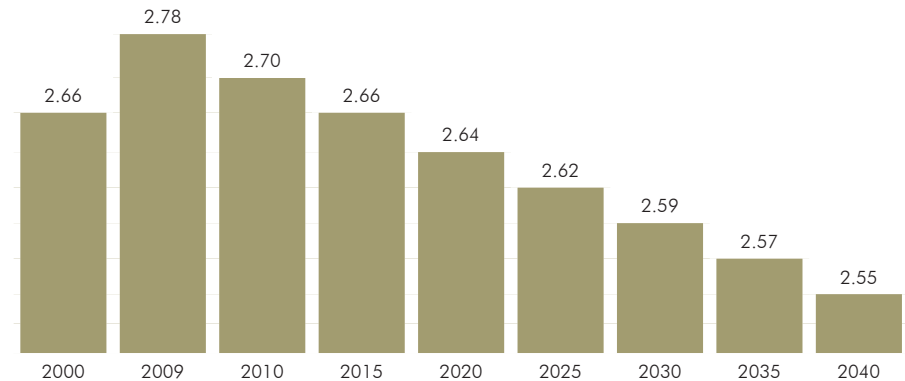
Source: U.S Census Bureau, 2000 and 2010 U.S. Census

HOUSEHOLD FORECAST, 2010-2040

household population		
2010	361,030	
2015	376,536	4.3%
2020	397,237	5.5%
2025	415,795	4.7%
2030	436,202	4.9%
2035	451,446	3.5%
2040	461,469	2.2%
forecasted growth	100,439	
percent forecasted growth	28%	

Montgomery County Planning Department Round 8.1 Cooperative Forecast

AVERAGE HOUSEHOLD SIZE



Source: U.S Census Bureau, 2000 and 2010 U.S. Census; 2009 American Community Survey; Montgomery County Planning Department Round 8.1 Cooperative Forecast

POPULATION AND HOUSEHOLD COUNT

	2000	2010
total population	873,341	971,777
household population	863,910	962,877
households	324,565	357,086

Source: U.S Census Bureau, 2000 and 2010 U.S. Census

HOUSEHOLD INCOME

	2000	2010
Under \$15,000	6%	7%
\$15,000 to \$34,999	13%	11%
\$35,000 to \$49,999	13%	9%
\$50,000 to \$74,999	20%	16%
\$75,000 to \$99,999	15%	12%
\$100,000 to \$149,999	17%	19%
\$150,000 to \$199,999	7%	11%
\$200,000+	8%	15%
median household income	\$93,627	\$89,155

Source: U.S Census Bureau, 2000 U.S. Census; 2010 American Community Survey

HOUSEHOLD TYPES

	2000	2010
family	69	68
living alone	24	26
other	6	6

Source: U.S Census Bureau, 2000 U.S. Census; 2010 American Community Survey

PERSONS IN HOUSEHOLD

	2000	2010
one	24%	26%
two	31%	31%
three	17%	17%
four	16%	15%
five+	11%	11%

Source: U.S Census Bureau, 2000 U.S. Census; 2010 American Community Survey

HOUSING TENURE

	2000	2010
rate of homeownership	69%	66%

Source: U.S Census Bureau, 2000 U.S. Census; 2010 American Community Survey

HOUSING COSTS

	2000	2010
median monthly housing costs - homeowner	\$1,577	\$2,498
median monthly housing costs - renter	\$914	\$1,466
cost burdened households* - homeowner	22%	37%
cost burdened households* - renter	37%	54%

* spending more than 30% of income on housing

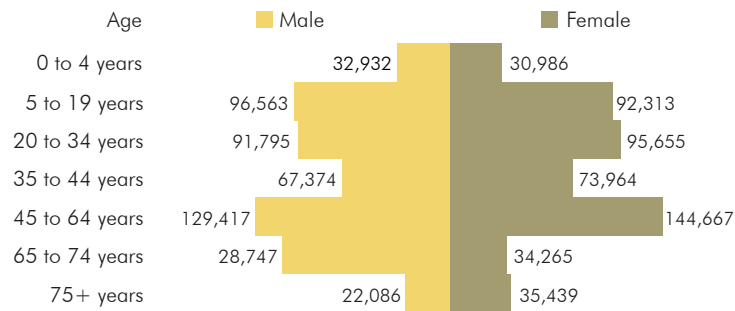
Source: U.S Census Bureau, 2000 U.S. Census; 2010 American Community Survey

AGE DISTRIBUTION

	2000	2010
0 to 4 years	6.9%	6.5%
5 to 19 years	20.4%	19.3%
20 to 34 years	19.5%	19.2%
35 to 44 years	17.8%	14.5%
45 to 64 years	24.2%	28.1%
65 to 74 years	5.7%	6.5%
75+ years	5.5%	5.9%

Source: U.S Census Bureau, 2000 and 2010 U.S. Census

AGE AND GENDER



Source: U.S Census Bureau, 2010 American Community Survey

RACE AND ETHNICITY

	2000	2010
non-Hispanic White	59.5%	49.2%
Black/African American	14.8%	16.9%
Hispanic	11.5%	17.1%
Asian or Pacific Islander	11.3%	13.7%
other	2.9%	3.2%

Source: U.S Census Bureau, 2000 U.S. Census; 2010 American Community Survey

EDUCATION

- Among counties with 250,000 or more residents, Montgomery County is tied with Howard County, MD for first in the nation in the share of adults who have earned a graduate degree (30 percent).

EDUCATIONAL ATTAINMENT

	2000	2010
less than high school	10%	9%
high school graduate	14%	14%
associate/trade school	21%	20%
bachelor degree	27%	26%
graduate degree	27%	30%

Source: U.S Census Bureau, 2000 U.S. Census; 2010 American Community Survey

FOREIGN LANGUAGE SPEAKERS

- 39 percent of all County residents ages five and up speak a language other than English at home.

FOREIGN LANGUAGE SPEAKERS

	2000	2010
share of residents(ages 5+)	32%	39%
English-proficient	19%	24%
not English-proficient	13%	16%

Source: U.S Census Bureau, 2000 U.S. Census; 2010 American Community Survey

employment

JOBS AND INDUSTRIES

- There were 510,000 jobs and 34,899 employers in Montgomery County as of March 2011.
- The County has added 35,700 jobs since 2000, an increase of eight percent.
- Montgomery County's three largest public sector employers are the Montgomery County Public School System, the National Institutes of Health, and the National Naval Medical Center.
- Adventist Healthcare, Lockheed Martin, and Marriott International are the County's three largest private sector employers.
- Fifteen percent of persons who work in Montgomery County are in the professional, scientific, and technical services sector.

TEN LARGEST PRIVATE SECTOR EMPLOYERS

4000+ employees

Adventist Healthcare

Lockheed Martin

1000 to 3,999 employees

Marriott International

Giant Food Stores

Holy Cross Hospital

Westat Research

Kaiser Permanente

GEICO

Medimmune LLC

Verizon

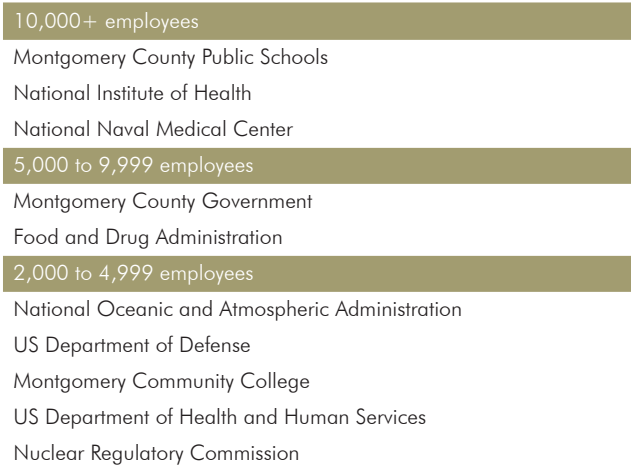
Source: Montgomery County Planning Department analysis of BLS data

EMPLOYMENT BASE, 2010

	job	share
Health Care and Social Assistance	75,922	15%
Professional, Scientific, and Technical Services	74,166	15%
Public Administration	60,536	12%
Retail Trade	49,002	10%
Educational Services	37,375	7%
Accommodation and Food Services	33,653	7%
Administrative and Support	32,447	6%
Construction	24,843	5%
Other Services (except Public Administration)	24,288	5%
Finance and Insurance	22,046	4%
Information	15,580	3%
Manufacturing	13,321	3%
Real Estate and Rental and Leasing	11,973	2%
Wholesale Trade	9,790	2%
Management of Companies and Enterprises	9,402	2%
Transportation and Warehousing	7,257	1%
Arts, Entertainment, and Recreation	7,042	1%
Utilities	629	0%
Agriculture, Forestry, Fishing and Hunting	550	0%
Mining, Quarrying, and Oil and Gas Extraction	178	0%
Unclassified	0	0%
Total	510,000	100%

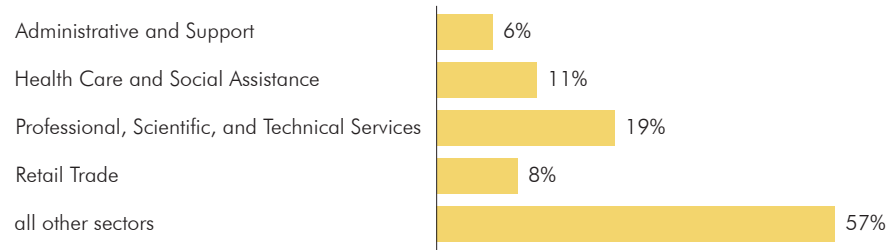
Source: Montgomery County Planning analysis of BLS data

TEN LARGEST PUBLIC SECTOR EMPLOYERS



Source: Montgomery County Planning Department analysis of BLS data

JOB ESTABLISHMENTS



Source: Montgomery County Planning Department analysis of BLS data

RESIDENT WORKFORCE

- In 2010, there were 513,199 employed persons ages 16 and up living in Montgomery County, up 13 percent from 2000.
- The majority of employed County residents (59 percent) work in Montgomery County, unchanged from 2000. Thirty percent of employed residents work outside of Maryland, virtually unchanged from the 31 percent reported in 2000.
- The average commuting time for employed residents increased slightly from 32.8 minutes in 2000 to 34.0 minutes in 2010.

RESIDENT WORKFORCE

	2000	2010	change	percent change
employed residents ages 16+	455,331	513,199	57,868	13%

Source: U.S Census Bureau, 2000 U.S. Census; 2010 American Community Survey

WORK LOCATION OF COUNTY RESIDENTS

	2000	2010
inside Montgomery County	58.67%	58.69%
elsewhere in Maryland	10.04%	11.29%
work outside of Maryland	31.30%	30.02%

Source: U.S Census Bureau, 2000 U.S. Census; 2010 American Community Survey

COMMUTE MODE OF COUNTY RESIDENTS

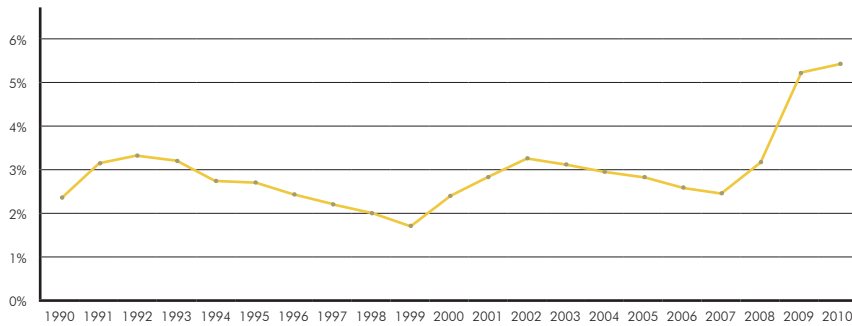
	2000	2010
drive alone	68.9%	64.8%
public transit/rail	12.6%	15.1%
carpool	10.9%	11.1%
work at home	4.8%	5.9%
walk/bike/other	2.7%	3%
average commutes (in minutes)	33	34

Source: U.S Census Bureau, 2000 U.S. Census; 2010 American Community Survey

UNEMPLOYMENT

- Annual average unemployment for 2010 was 5.6 percent, down 0.2 percent in 2009 but up 2.9 percent from 2007.
- County unemployment peaked at 6.2 percent in January 2010, the highest level in almost 20 years. Unemployment declined by October 2011 to 5.2 percent. Over this period, the number of County residents out of work declined 16 percent from 31,818 in January 2010 to 26,820 in October 2011.

ANNUAL AVERAGE UNEMPLOYMENT RATE, 1990-2010



Source: U.S. Bureau of Labor Statistics, Local Area Unemployment Statistics

housing

MARKET

- The median price of single-family detached houses in the County increased by one percent from \$452,299 in 2009 to \$455,000 in 2010, but was 23 percent below the median price in 2007.
- The median price of single-family attached houses sold in 2010 was \$270,000, down three percent from 2009, but 29 percent below the 2007 median.
- Median prices for single-family detached houses experienced a slight increase from 2009 to 2010 (one percent) but a decrease from 2008 to 2009 (12 percent).
- Home sales volume overall fell to 21,656 in 2010, down eight percent from 23,424 sales in 2009, but up 22 percent from 17,812 sales in 2007.
- There were 2,310 foreclosure auctions in the County between 2010 and mid-2011. In 2010 alone, there were 1,951 foreclosure auctions, nearly the same number that occurred in 2008 (1,946).

MEDIAN HOME SALES PRICE, 2010 DOLLARS

	2007	2008	2009	2010	change	
					from 2007	from 2009
single-family attached	381,231	319,028	277,478	270,000	-29%	-3%
single-family detached	592,617	516,521	452,299	455,000	-23%	1%

Source: Montgomery County Planning Department Land Use Database

HOUSING UNITS SOLD

	2007	2008	2009	2010	change	
					from 2007 to 2010	from 2009 to 2010
all housing units	17,812	19,143	23,424	21,656	22%	-8%
single-family detached	9,453	8,579	10,423	11,885	26%	14%
single-family attached	3,936	3,479	4,056	4,561	16%	12%
multifamily	4,423	7,085	8,945	5,210	18%	-42%

Source: Montgomery County Planning Department Land Use Database

HOUSING SALES BY UNIT TYPE

	sales
single-family detached	55%
single-family attached	21%
multifamily	24%

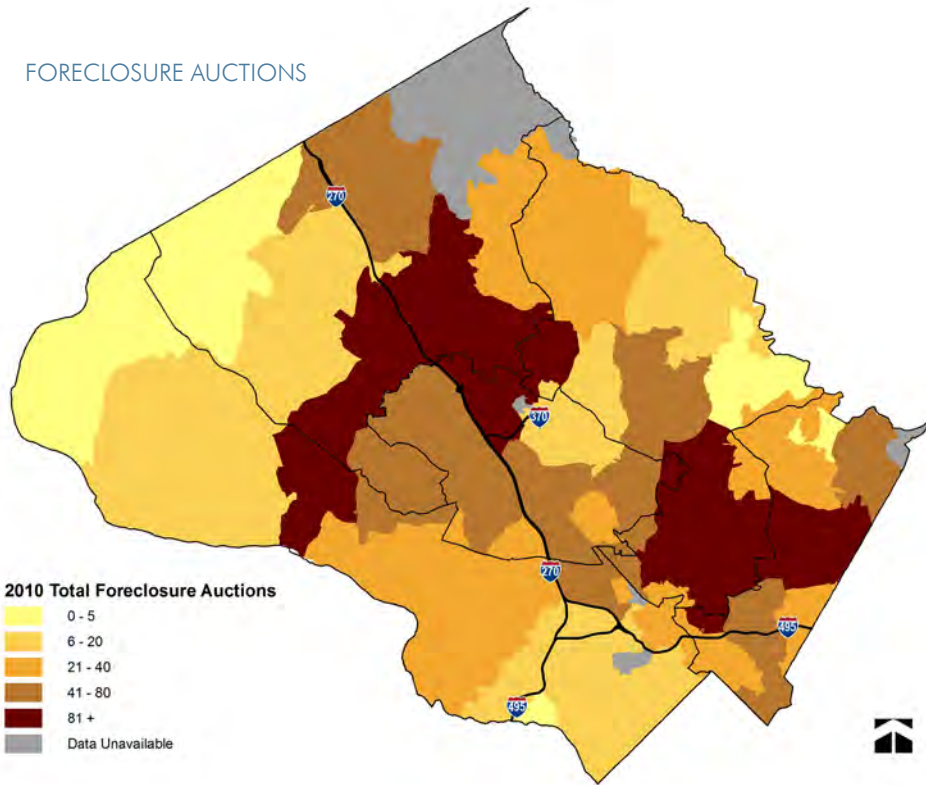
Source: Montgomery County Planning Department Land Use Database

RESIDENTIAL FORECLOSURES

	countywide
total foreclosure auctions since 2010	2,310
2010	1,951
2011 through 3rd quarter	359

Source: Department of Housing and Community Development, 2011

FORECLOSURE AUCTIONS



2010 Total Foreclosure Auctions

- 0 - 5
- 6 - 20
- 21 - 40
- 41 - 80
- 81 +
- Data Unavailable

SUPPLY

- Fifty-seven percent of the County's housing was built before 1980. Twenty-four percent of the County's homes were constructed during the building boom of the 1980s. Only 19 percent of the County's housing stock was built after 1990.
- The County has 173 affordable housing units approved since 2010. These units include 139 moderately priced dwelling units (MPDUs) and 34 affordable housing dwellings.

MPDUs are established with a time limit, but controlled MPDUs are subject to the limits on resale prices, rents, or owner-occupancy described in Chapter 25A-9 of the Montgomery County Code

EXISTING HOUSING BY DECADE BUILT

	countywide
pre-1950	12.8%
1950s	17%
1960s	14.2%
1970s	13.3%
1980s	23.7%
1990s	10.8%
2000s	8.1%
2010	0.2%
pre-1980	57.2%
after-1990	19.1%

Source: Montgomery County Planning Department, 2010

EXISTING HOUSING UNITS

	county wide	share
all	356,763	-
single-family detached	176,688	50%
townhouse	65,526	18%
multifamily (condos and apartments)	114,549	32%

Source: Montgomery County Planning Department, 2010

MODERATELY PRICED DWELLING UNITS (MPDUS)

mpdus	affordable housing	workforce housing	senior housing	total
139	0	34	0	173

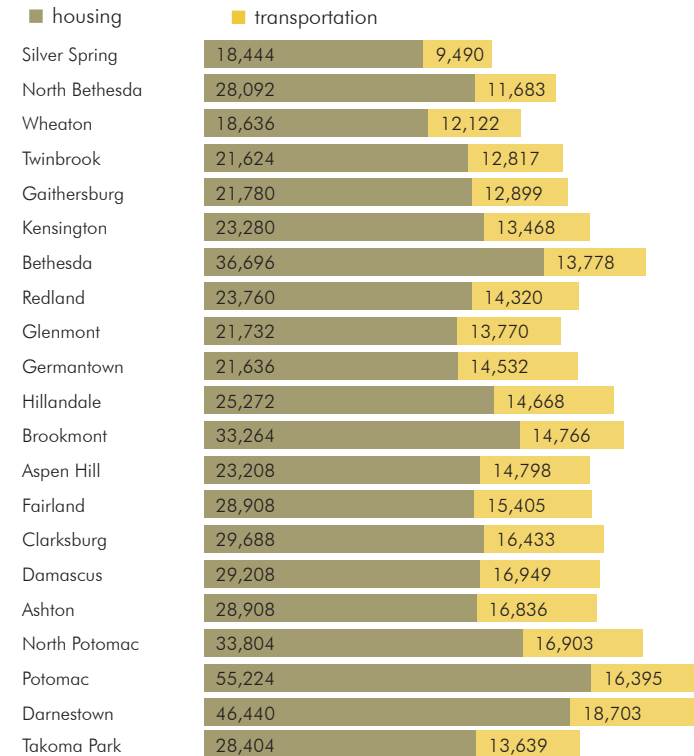
Source: Montgomery County Planning Department, Land Use database

transportation costs

Housing prices alone do not determine the true cost of living in a given location. When transportation costs are factored in, a more accurate picture of the overall affordability of a location choice emerges. A longer commute and greater auto-dependency for everyday living can offset the apparent affordability of a home located farther away from urban centers.

- Areas of Montgomery County that have lower transportation costs—including Silver Spring, North Bethesda, Wheaton, and Twinbrook—are both Metro-accessible and relatively more urbanized.
- Transportation costs are highest in low density areas of the County—including Darnestown, Potomac, Damascus, Ashton and Clarksburg—that are more distant from job centers and have lower transit connectivity.
- On average, Silver Spring households spend an average of \$9,490 on transportation each year, half of the \$18,703 average transportation cost for Darnestown households.

ANNUAL TRANSPORTATION AND HOUSING COSTS



Source: Urban Land Institute, Terwilliger Center Housing + Transportation Calculator

walk score

Like all suburbs, Montgomery County is walking challenged. The County's more urbanized communities, like Silver Spring and Bethesda, offer the benefits of walkable neighborhoods:

- street activity
- opportunities for small businesses
- social interaction
- safer pedestrian spaces.

Creating more walkable places is an economic development strategy that is supported by planning recommendations in communities like Kensington, Long Branch, White Flint, Germantown, and more.

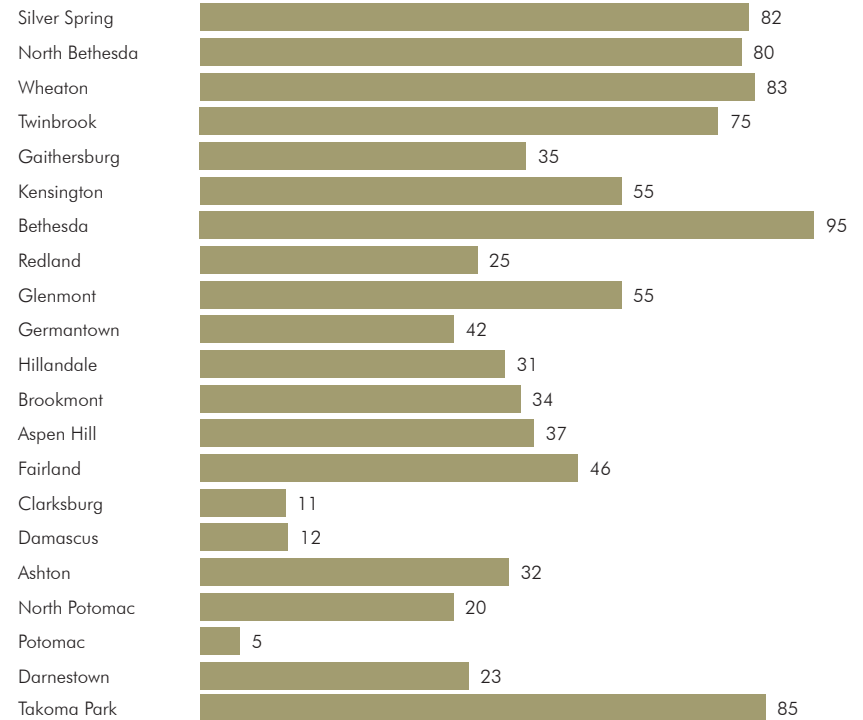
WalkScore.com measures walkability for most residential neighborhoods within the United States and ranks the 40 largest cities according to their walkability. What makes a neighborhood walkable? Factors include nearby services, mixed incomes and mixed uses, parks and public spaces, pedestrian-centric design, proximity to schools and workplaces, and bike- and walker-friendly streets.

What does the Walk Score mean?

- 90-100 (Walkers' Paradise) – daily errands can be accomplished on foot and do not require owning a car.
- 70-89 (Very Walkable) – Most errands can be accomplished on foot and it is possible to get by without owning a car.
- 50-69 (Somewhat Walkable) – some stores and amenities are within walking distance, but many every day trips still require a bike, public transit, or a car.
- 25-49 (Car-Dependent) – only a few destinations are within easy walking range. For most errands, driving or public transportation is a must.
- 0-24 (Car-Dependent; Driving-Only) – virtually no neighborhood destinations are within walking range.

Walkability varies across the County, depending on historic land use patterns and access to transit. Several master and sector plans underway recommend improvements to the network of roadways, streets, mid-block pedestrian connections, sidewalks, trails, and bikeways designed to link communities to desired destinations such as transit, schools, and commercial services. In addition, the plans pay particular attention to the mix of jobs and housing within their areas to help reduce car dependence and vehicle miles traveled.

WALK SCORES



Source: WalkScore.com

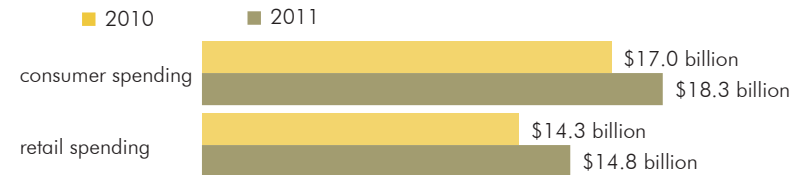
retail

- Montgomery County residents spent \$18.3 billion on consumer purchases in 2011. Motor vehicle, general merchandise, and food and beverage purchases topped the consumer spending list.
- Sales by County retailers totaled \$14.8 billion. Motor vehicle, food and beverages, and food service and drinking places led 2011 retail sales.
- There was a rise in both consumer spending (eight percent) and retail sales (four percent) between 2010 and 2011.
- With spending growing more quickly than sales, the County's retail

opportunity gap—the amount that residents spend at retail locations outside the County—widened from \$2.7 billion in 2010 to \$3.5 billion in 2011. The gap has increased each year since 2008, when it was \$1.0 billion, indicating that retail sales in the County are recovering much more slowly than consumer spending.

- General merchandise stores (such as department, variety, and general stores) showed the largest retail gap in 2011 (\$1.5 billion), with County retailers capturing only 39 percent of residents' spending in this category.
- Non-store retail spending (including online, mail order, and direct sales) totaled \$1.5 billion, accounting for eight percent of total retail spending by County residents. Non-store sales by County retailers totaled \$1.2 billion, eight percent of total retail sales in the County. Only two categories showed a net surplus in retail sales, indicating that they attracted shoppers from outside Montgomery County. Food and beverage stores had sales of \$575 million in excess of the amount that County residents spent. Motor vehicle and parts dealers in the County also attracted \$131 million in net sales to outside consumers.

RETAIL SPENDING AND SALES



Source: Montgomery County Planning Department analysis of 2011 Claritas SiteReports data

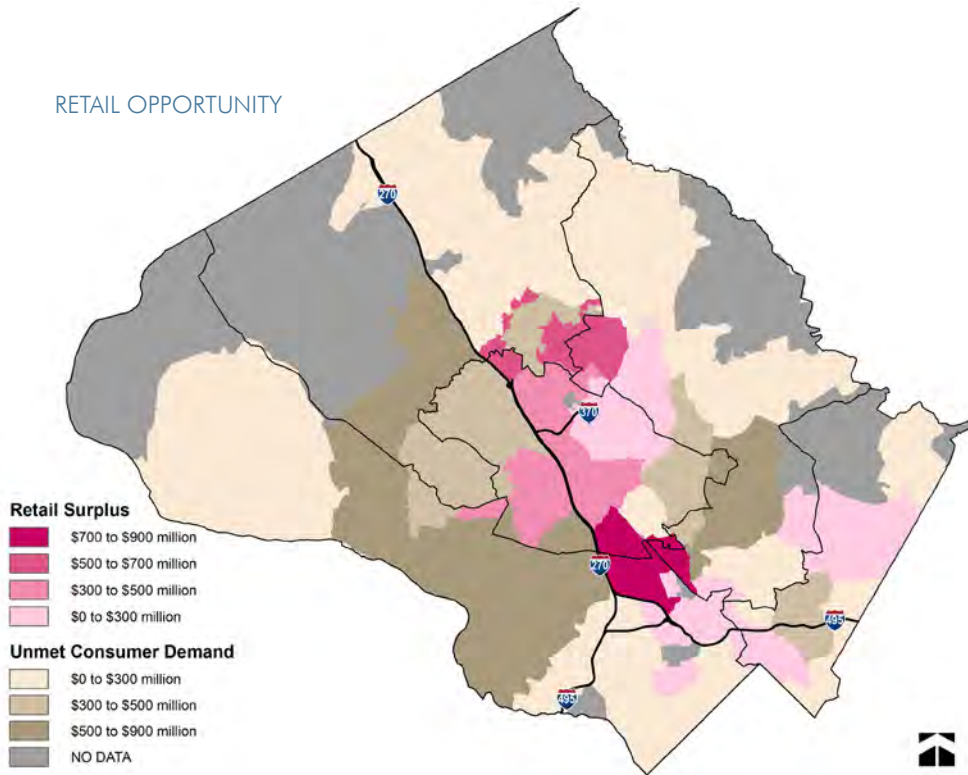
RETAIL ACTIVITY

retail activity 2011	consumer spending	retail spending	capture rate	unmet consumer demand	retail surplus
Total	\$18,274,520,721	\$14,789,434,631	81%	\$3,485,086,090	\$
Building Material, Garden Equip Stores	1,786,651,441	1,357,344,142	76%	429,307,299	
Clothing and Clothing Accessories Stores	989,680,598	926,291,821	94%	63,388,777	
Electronics and Appliance Stores	442,258,774	424,470,124	96%	17,788,650	
Food and Beverage Stores	2,132,489,256	2,707,980,786	127%		575,491,530
Foodservice and Drinking Places	1,948,933,012	1,579,940,288	81%	368,992,724	
Furniture and Home Furnishings Stores	445,423,356	306,355,599	69%	139,067,757	
Gasoline Stations	1,512,793,391	580,418,288	38%	932,375,103	
General Merchandise Stores	2,430,603,244	945,859,373	39%	1,484,743,871	
Health and Personal Care Stores	1,064,386,263	830,105,249	78%	234,281,014	
Miscellaneous Store Retailers	462,330,861	229,015,550	50%	233,315,311	
Motor Vehicle and Parts Dealers	3,211,410,608	3,342,592,167	104%		131,181,559
Non-Store Retailers	1,446,014,624	1,234,526,148	85%	211,488,476	
Sporting Goods, Hobby, Book, Music Stores	401,545,293	324,535,096	81%	77,010,197	

countywide snapshot

An **opportunity gap** is a sign that County residents are spending more than County retailers are selling—indicating that retailers may have an opportunity to capture spending that currently is going outside the County. A **retail surplus** occurs when retail sales exceed local spending—a sign that outside residents are coming into the County to shop. The **capture rate** is the ratio of local retail sales to spending by area residents.

RETAIL OPPORTUNITY



DETAILED RETAIL ACTIVITY

retail activity 2011	consumer spending	retail sales	capture rate	unmet consumer demand	retail surplus
Automotive Dealers	\$2,834,650,073	\$3,220,103,505	114%	\$	\$385,453,432
Automotive Parts/Accsrs, Tire Stores	235,992,342	100,834,965	43%	135,157,377	
Beer, Wine and Liquor Stores	143,389,870	145,441,819	101%		2,051,949
Book Stores and News Dealers	81,563,808	56,847,747	70%	24,716,061	
Camera and Photographic Equipment Stores	21,059,749	33,608,175	160%		12,548,426
Childrens, Infants Clothing Stores	35,982,829	44,282,856	123%		8,300,027
Clothing Accessories Stores	17,520,402	9,061,062	52%	8,459,340	
Computer and Software Stores	95,242,613	115,082,092	121%		19,839,479
Convenience Stores	89,161,644	101,378,817	114%		12,217,173
Cosmetics, Beauty Supplies, Perfume Stores	38,627,328	37,187,326	96%	1,440,002	
Department Stores Excl Leased Depts	1,258,870,035	700,433,821	56%	558,436,214	
Drinking Places Alcoholic Beverages	83,852,889	11,470,766	14%	72,382,123	
Family Clothing Stores	363,417,468	330,038,528	91%	33,378,940	
Florists	38,547,801	19,294,048	50%	19,253,753	
Full Service Restaurants	888,924,383	787,314,777	89%	101,609,606	
Furniture Stores	255,954,446	144,107,649	56%	111,846,797	
Gasoline Stations With Conv Stores	1,116,951,183	320,279,814	29%	796,671,369	
Gift, Novelty and Souvenir Stores	87,175,655	36,088,151	41%	51,087,504	
Hardware Stores	158,654,476	110,623,153	70%	48,031,323	
Hobby, Toys and Games Stores	83,737,933	64,617,219	77%	19,120,714	
Home Centers	665,812,425	550,968,203	83%	114,844,222	
Home Furnishing Stores	189,468,910	162,247,950	86%	27,220,960	
Household Appliances Stores	74,019,285	52,802,771	71%	21,216,514	
Jewelry Stores	173,346,693	169,630,695	98%	3,715,998	
Limited Service Eating Places	815,777,214	635,089,131	78%	180,688,083	
Luggage and Leather Goods Stores	10,734,868	4,894,777	46%	5,840,091	
Men's Clothing Stores	43,687,315	34,259,130	78%	9,428,185	
Musical Instrument and Supplies Stores	30,291,451	47,079,282	155%		16,787,831
Nursery and Garden Centers	136,664,050	47,467,757	35%	89,196,293	
Office Supplies and Stationery Stores	117,826,799	75,547,041	64%	42,279,758	
Optical Goods Stores	41,433,500	66,159,571	160%		24,726,071
Other Building Materials Dealers	767,239,174	596,467,182	78%	170,771,992	
Other Clothing Stores	45,876,538	45,726,476	100%	150,062	
Other Gasoline Stations	395,842,208	260,138,474	66%	135,703,734	
Other General Merchandise Stores	1,171,733,209	245,425,552	21%	926,307,657	
Other Health and Personal Care Stores	67,857,906	50,724,826	75%	17,133,080	
Other Miscellaneous Store Retailers	172,669,269	75,888,101	44%	96,781,168	
Other Motor Vehicle Dealers	140,768,193	21,653,697	15%	119,114,496	
Outdoor Power Equipment Stores	17,944,595	14,084,041	78%	3,860,554	
Paint and Wallpaper Stores	40,336,721	37,733,806	94%	2,602,915	
Pharmacies and Drug Stores	916,467,529	676,033,526	74%	240,434,003	
Prerecorded Tapes, CDs, Record Stores	42,138,231	24,128,243	57%	18,009,988	
Radio, Television, Electronics Stores	251,937,127	222,977,086	89%	28,960,041	
Sew/Needlework/Piece Goods Stores	21,190,709	33,055,358	156%		11,864,649
Shoe Stores	123,067,607	97,815,146	79%	25,252,461	
Special Foodservices	160,378,526	146,065,614	91%	14,312,912	
Specialty Food Stores	60,019,781	50,389,131	84%	9,630,650	
Sporting Goods Stores	142,623,161	98,807,247	69%	43,815,914	
Supermarkets, Grocery (Ex Conv) Stores	1,839,917,961	2,410,771,019	131%		570,853,058
Used Merchandise Stores	46,111,337	22,198,209	48%	23,913,128	
Women's Clothing Stores	176,046,878	190,583,151	108%		14,536,273

Source: Montgomery County Planning Department analysis of Claritas SiteReports data

countywide snapshot

office

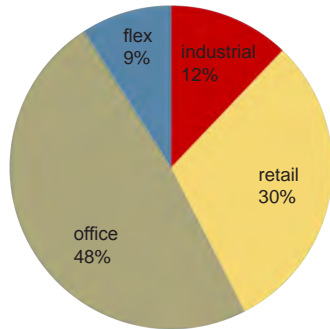
- With 68.7 million square feet of leasable space in 1,501 buildings, offices account for 48 percent of the County's 141.7 million total commercial space inventory.¹
- No office space was delivered during 2011, versus 128,000 square feet delivered during 2010. There were 751,000 square feet of office space under construction as of the 4th quarter of 2011.
- The annual average office vacancy rate was 13.9 percent in 2011, down from 14.3 percent in 2010 and just above the 13.7 percent vacancy rate in 2009. Overall, the vacancy rate remains 4.6 percentage points above the 9.3 percent pre-recession vacancy rate in 2007.
- Annual average office rents were \$28.24 per square foot in 2011, virtually unchanged from 2010 (\$28.20) but 2.2 percent below average 2009 rents (\$28.89).

COMMERCIAL SPACE

	buildings	square feet
total commercial space	4,744	141,741,805
office	1,501	68,743,606
retail	2,268	42,406,105
flex	337	13,265,457
industrial	638	17,326,637

Source: Montgomery County Planning Department analysis of CoStar data

COMMERCIAL SQUARE FOOTAGE BY TYPE



Source: Montgomery County Planning Department analysis of CoStar data

¹ The inventory of commercial space reported in CoStar can change as existing properties are added to the database. These properties are not considered new space.

ANNUAL AVERAGE OFFICE VACANCY RATE



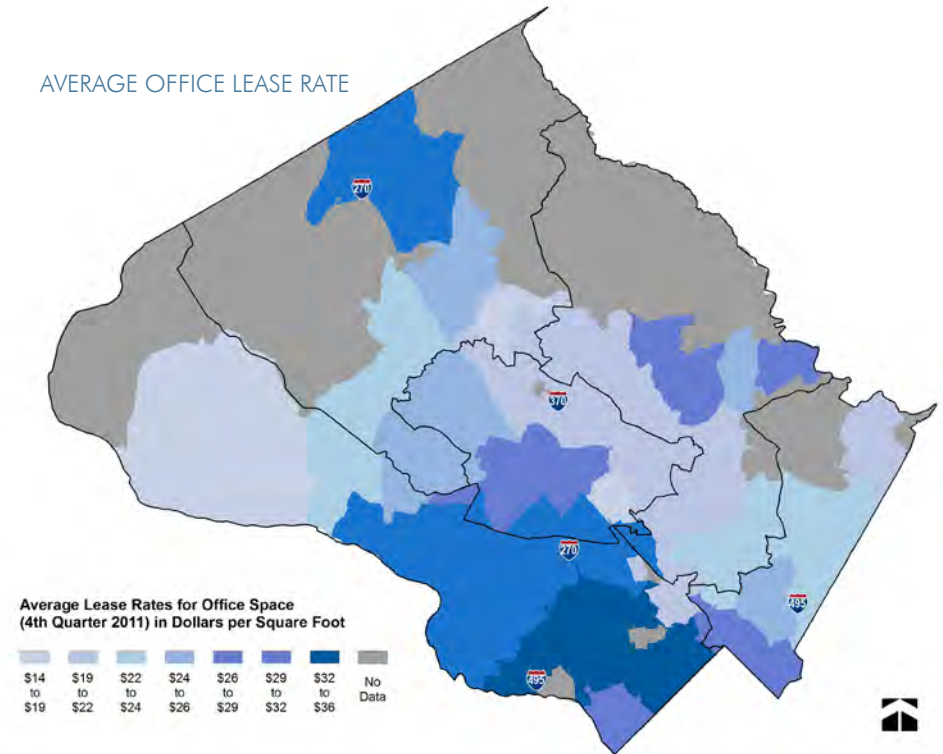
Source: Montgomery County Planning Department analysis of CoStar data

ANNUAL AVERAGE OFFICE LEASE RATE

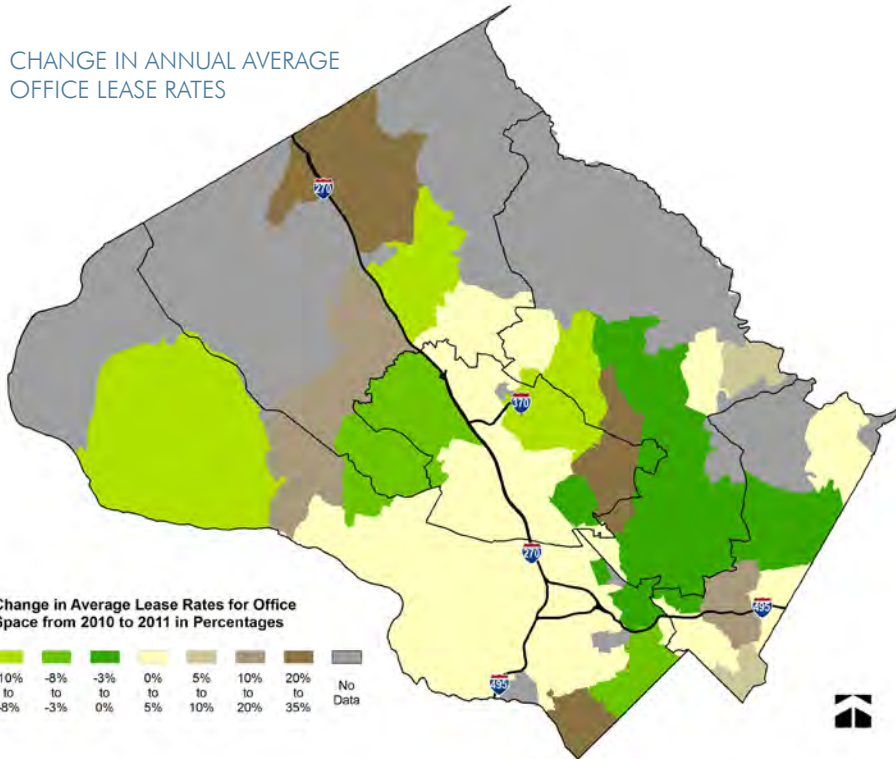


Source: Montgomery County Planning Department analysis of CoStar data

AVERAGE OFFICE LEASE RATE



CHANGE IN ANNUAL AVERAGE OFFICE LEASE RATES

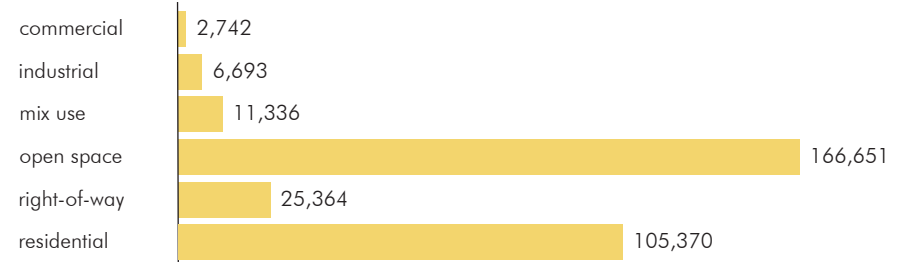


development activity

ZONING

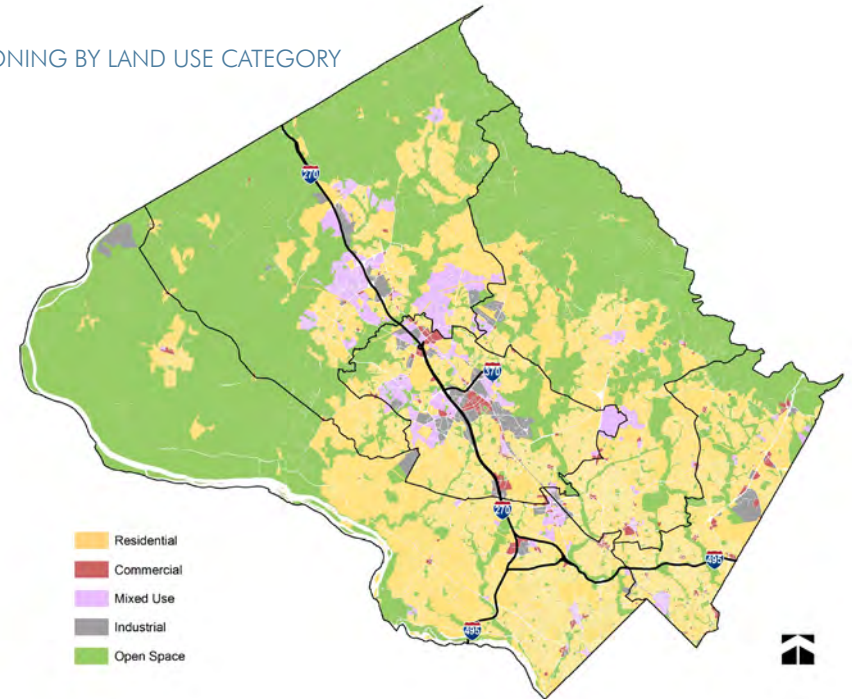
- Of the 324,420 acres that make up Montgomery County, 314,977 acres (97 percent) are land and 9,443 (3 percent) are water.
- 166,651 acres—53 percent of the County's land area—are zoned for open space uses, including agriculture and parkland.
- Residentially zoned land totals 105,370 acres (33 percent).
- There are 2,742 acres zoned for commercial office or retail use (one percent) and another 11,336 acres (four percent) zoned for mixed commercial and residential use.
- 6,693 acres (two percent) are zoned for industrial use.
- Roads and other transportation rights-of-way take up the remaining 25,364 acres (eight percent) of land in the County.

ACRES ZONED BY LAND USE CATEGORY



Source: Montgomery County Planning Department, 2010

ZONING BY LAND USE CATEGORY

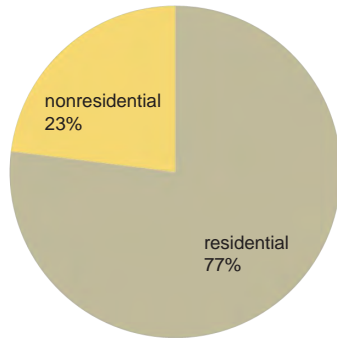


ASSESSED VALUE

- The total assessed value of all properties in Montgomery County was \$182.7 billion as of 2010.
- Total assessed value included buildings, valued at \$92.4 billion (51 percent), and land, valued at \$90.2 billion (49 percent).

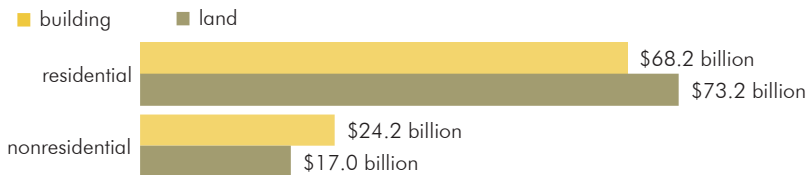
- Residential properties accounted for \$141.5 billion (77 percent) of total assessed value. Of this amount, \$68.2 billion (48 percent) is the total value of houses and other buildings on the properties and \$73.2 billion (52 percent) is residential land value.
- Nonresidential properties accounted for \$41.2 billion (23 percent) of total assessed value. Of this amount, \$24.2 billion (59 percent) is buildings and \$17.0 billion (41 percent) is non-residential land value.

ASSESSED VALUE



Source: Montgomery County Planning Department and Maryland State Department of Assessment and Taxation, 2010

ASSESSED VALUE BY PROPERTY TYPE

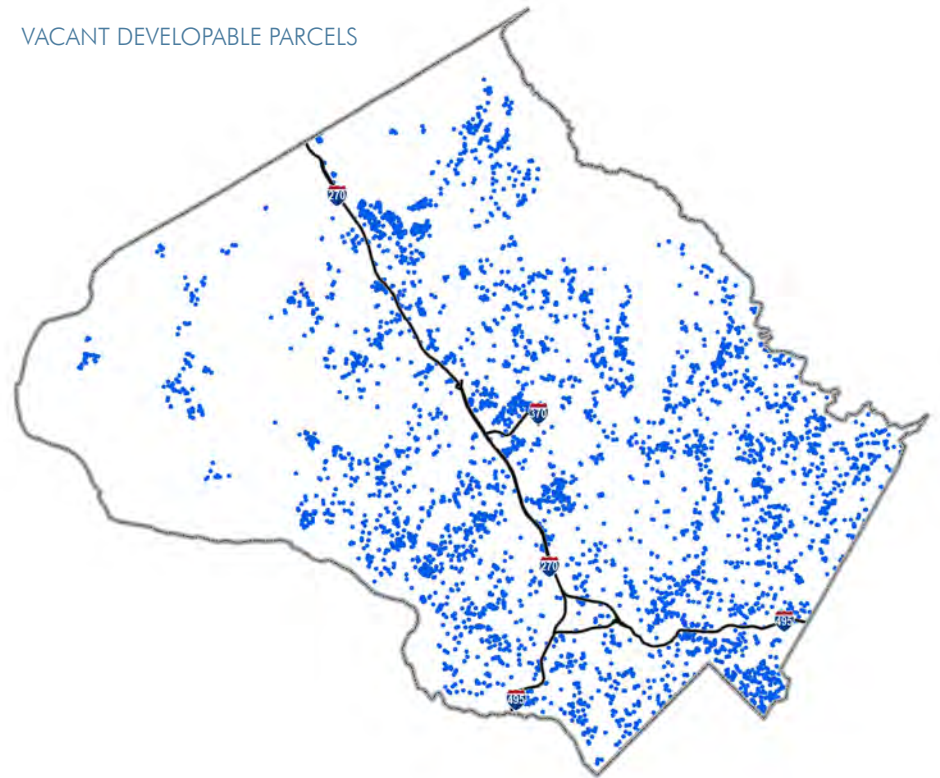


Source: Montgomery County Planning Department analysis of 2011 Claritas SiteReports data

ASSEMBLY POTENTIAL

- There are 9,149 acres of vacant, developable land in Montgomery County, of which 21 percent is contained in small properties of less than two acres.
- Many developable vacant parcels are adjacent to one another, presenting an opportunity to assemble land into larger sites. Under such a process, the stock of mid- to large size tracts (over 2 acres) would increase from 79 percent to 87 percent of all vacant land.

VACANT DEVELOPABLE PARCELS



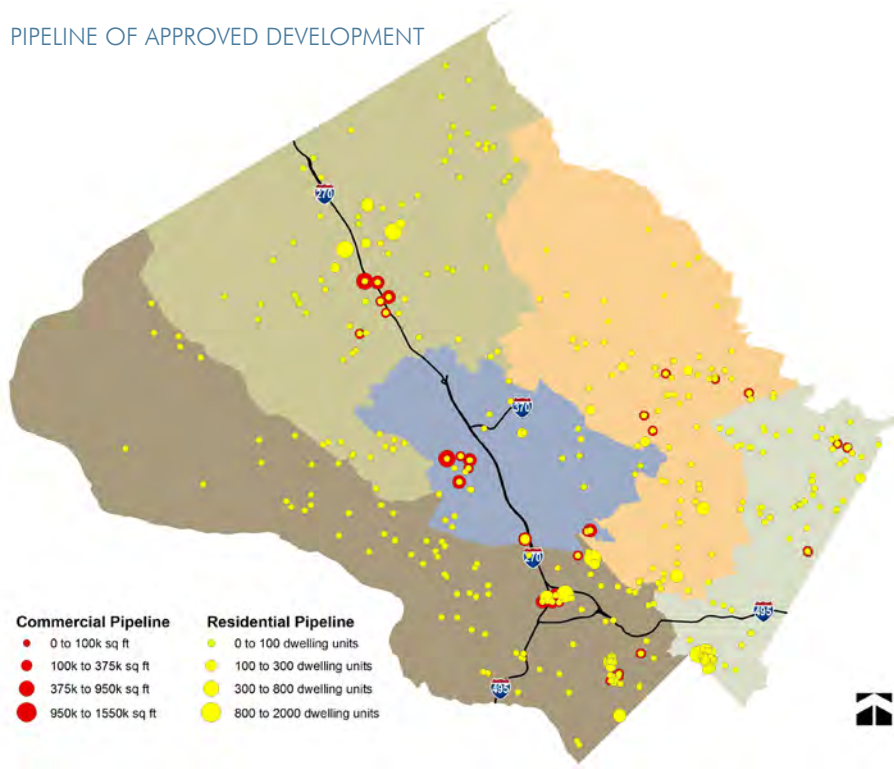
DEVELOPMENT PIPELINE

The development pipeline is a snapshot of commercial and residential development activity in Montgomery County. It tracks the amount of commercial square footage and number of dwelling units in each development project approved by the Planning Board. Development projects in Gaithersburg and Rockville are not represented.

As of November 2011, the development pipeline showed:

- 16,799 residential units in 279 approved development projects remaining to be built.
- 20.2 million square feet of approved and unbuilt commercial space in 111 projects.

PIPELINE OF APPROVED DEVELOPMENT





COUNCIL DISTRICTS
SNAPSHOTS

district 1



demographics

POPULATION AND HOUSEHOLDS

- In 2010, District 1 had 194,290 residents living in 79,191 households.
- Between 2010 and 2040, District 1 is forecasted to add 58,753 residents—a 27 percent increase. Twenty-six percent of the County's population growth is forecasted to occur in District 1.
- The number of District 1 households is forecasted to grow by 29 percent to 106,183 in 2040—accounting for 24 percent of household growth Countywide.
- Forty-eight percent of District 1 adults ages 25 and older have earned a graduate degree, compared to 30 percent Countywide.
- Twenty-seven percent of District 1 residents ages five and up speak a language other than English at home, compared to 39 percent Countywide.
- At \$144,098, District 1's median household income is 38 percent above the County median of \$89,155.

POPULATION AND HOUSEHOLDS, 2010

household population	194,290
households	79,191

Source: U.S Census Bureau, 2010 U.S. Census

HOUSEHOLD POPULATION FORECAST, 2010-2040

year	district 1	county	share of county
2010	214,279	959,667	22%
2015	229,608	1,001,386	23%
2020	245,815	1,051,149	23%
2025	250,012	1,093,267	23%
2030	258,836	1,136,423	23%
2035	266,099	1,167,742	23%
2040	273,032	1,185,623	23%
forecasted growth, 2010 to 2040	58,753	225,956	26%
percent growth %	27	24	

Source: Montgomery County Planning Department Round 8.1 Cooperative Forecast

HOUSEHOLD FORECAST, 2010-2040

year	district 1	county	share of county
2010	82,456	361,030	23%
2015	87,156	376,536	23%
2020	93,231	397,237	23%
2025	95,017	415,795	23%
2030	98,920	436,202	23%
2035	102,632	451,446	23%
2040	106,183	461,469	23%
forecasted growth, 2010 to 2040	23,726	100,439	24%
percent growth %	29	30	

Source: Montgomery County Planning Department Round 8.1 Cooperative Forecast

POPULATION AND HOUSEHOLD GROWTH, 2010-2040



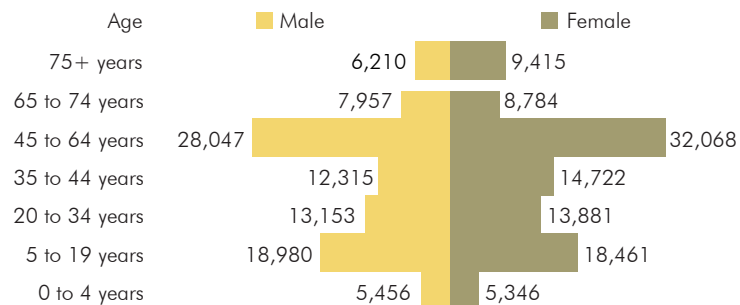
Montgomery County Planning Department Round 8.1 Cooperative Forecast

POPULATION AND HOUSEHOLD COUNT, 2010

	district	county
household population	194,290	962,877
households	79,191	357,086

Source: U.S Census Bureau, 2010 U.S. Census

AGE AND GENDER



Source: U.S Census Bureau, 2006-2010 American Community Survey

AGE DISTRIBUTION

age	district 1	county
0 to 4 years	6%	7%
5 to 19 years	19%	19%
20 to 34 years	14%	19%
35 to 44 years	14%	14%
45 to 64 years	31%	28%
65 to 74 years	9%	6%
75+ years	8%	6%

Source: U.S Census Bureau, 2006-2010 American Community Survey, 2010 American Community Survey

RACE AND ETHNICITY

race	district 1	county
non-Hispanic White	75%	49%
Black/African American	5%	17%
Hispanic	7%	17%
Asian or Pacific Islander	11%	14%
other	2%	3%

Source: U.S Census Bureau, 2006-2010 American Community Survey, 2010 American Community Survey

EDUCATIONAL ATTAINMENT

education	district 1	county
less than high school	3%	9%
high school graduate	7%	14%
associate/trade school	12%	20%
bachelor degree	30%	26%
graduate degree	48%	30%

Source: U.S Census Bureau, 2006-2010 American Community Survey, 2010 American Community Survey

FOREIGN LANGUAGE SPEAKERS

language	district 1	county
share of residents (ages 5+)	27%	39%
English-proficient	19%	24%
not English-proficient	8%	16%

Source: U.S Census Bureau, 2006-2010 American Community Survey, 2010 American Community Survey

district 1

HOUSEHOLD INCOME %

	district 1	county
Under \$50,000	16	27
\$50,000 to \$99,999	21	28
\$100,000 to \$149,999	18	19
\$150,000 to \$199,999	13	11
\$200,000+	31	15
median household income	\$144,098	\$89,155

Source: U.S Census Bureau, 2006-2010 American Community Survey, 2010 American Community Survey

HOUSING TENURE %

	district 1	county
rate of homeownership	75	66

Source: U.S Census Bureau, 2006-2010 American Community Survey, 2010 American Community Survey

HOUSEHOLD TYPES %

	district 1	county
family	67	68
living alone	28	26
other	5	6

Source: U.S Census Bureau, 2006-2010 American Community Survey, 2010 American Community Survey

PERSONS IN HOUSEHOLD %

	district 1	county
one	28	26
two	34	31
three	14	17
four	15	15
five+	8	11

Source: U.S Census Bureau, 2006-2010 American Community Survey, 2010 American Community Survey

HOUSING COSTS

	district 1	county
median monthly housing costs - homeowner	\$3,224	\$2,498
median monthly housing costs - renter	\$1,633	\$1,466
cost burdened households* - homeowner	32%	37%
cost burdened households* - renter	43%	54%

* spending more than 30% of income on housing

Source: U.S Census Bureau, 2006-2010 American Community Survey, 2010 American Community Survey

employment

JOBS AND INDUSTRIES

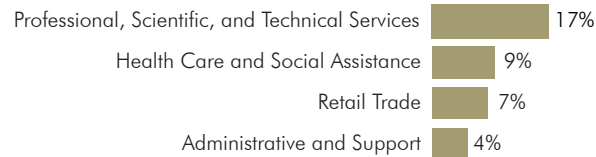
- 13,335 job establishments in District 1 employ 177,860 workers. The District contains 35 percent of all County jobs.
- Seventeen percent of all District 1 job establishments are in the professional, scientific, and technical services sector.
- Public administration jobs account for 17 percent of District 1's employment base. Health care and social assistance is second, with 15 percent of the District's jobs. The District's top three employers are the National Institutes of Health, the National Naval Medical Center, and Marriott International.

EMPLOYMENT BASE

	jobs	share of jobs	county	share of county sector
Accommodation and Food Services	11,680	7%	33,653	35%
Administrative and Support	11,203	6%	32,447	35%
Agriculture, Forestry, Fishing, and Hunting	37	0%	550	7%
Arts, Entertainment, and Recreation	3,301	2%	7,042	47%
Construction	5,158	3%	24,843	21%
Educational Services	8,675	5%	37,375	23%
Finance and Insurance	11,760	7%	22,046	53%
Health Care and Social Assistance	27,338	15%	75,922	36%
Information	2,305	1%	15,580	15%
Management of Companies and Enterprises	6,254	4%	9,402	67%
Manufacturing	1,944	1%	13,321	15%
Mining, Quarrying, and Oil and Gas Extraction	104	0%	178	58%
Other Services (except Public Administration)	11,696	7%	24,288	48%
Professional, Scientific, and Technical Services	22,398	13%	74,166	30%
Public Administration	30,125	17%	60,536	50%
Real Estate and Rental and Leasing	4,961	3%	11,973	41%
Retail Trade	15,157	9%	49,002	31%
Transportation and Warehousing	1,287	1%	7,257	18%
Unclassified	0	0%	0	0%
Utilities	402	0%	629	64%
Wholesale Trade	2,075	1%	9,790	21%

Source: Montgomery County Planning Department analysis of BLS data, 2011

JOB ESTABLISHMENTS-INDUSTRY PERCENTAGE



Source: Montgomery County Planning Department analysis of BLS data, 2011

JOB ESTABLISHMENTS

Professional, Scientific, and Technical Services	2,217
Health Care and Social Assistance	1,148
Retail Trade	874
Administrative and Support	503
other industry	8,631
total industry	13,339

Source: Montgomery County Planning Department analysis of BLS data, 2011

TEN LARGEST EMPLOYERS

4,000+ employees	
National Institutes of Health	
National Naval Medical Center	
1,000 to 3,999 employees	
Marriott International	
Nuclear Regulatory Commission	
Montgomery County Public Schools	
Lockheed Martin	
Government Employees Insurance Company	
Suburban Hospital	
US Department of Defense	
Admiral Security	

Source: Montgomery County Planning analysis of BLS data

RESIDENT WORKFORCE

- In 2010, there were 100,416 employed persons ages 16 and up living in District 1.
- District 1 accounts for 20 percent of the County's resident labor force.
- About half (51 percent) of District 1 employed residents work in Montgomery County, compared to 59 percent Countywide.
- Three out of seven employed residents in District 1 (43 percent) work outside of Maryland compared to 30 percent Countywide.

RESIDENT WORKFORCE

	district 1	county	share of county
employed residents ages 16+	100,416	513,199	20%

Source: U.S Census Bureau, 2006-2010 American Community Survey, 2010 American Community Survey

WORK LOCATION OF RESIDENTS

commute	district 1	county
inside Montgomery County	51%	59%
elsewhere in Maryland	6%	11%
work outside of Maryland	43%	30%

Source: U.S Census Bureau, 2006-2010 American Community Survey, 2010 American Community Survey

COMMUTE MODE OF RESIDENTS

	district 1	county
drive alone	64%	65%
public transit/rail	15%	15%
carpool	7%	11%
work at home	9%	6%
walk/bike/other	5%	3%

Source: U.S Census Bureau, 2006-2010 American Community Survey, 2010 American Community Survey

AVERAGE COMMUTE TIME OF RESIDENTS

	district 1	county
all commutes (in minutes)	30	34

Source: U.S Census Bureau, 2006-2010 American Community Survey, 2010 American Community Survey

housing

MARKET

- The 2010 median sales price for a District 1 single-family detached house was \$775,000, 70 percent above the County's median. The 2010 median single-family attached sales price was \$578,750, more than twice (114 percent) the County's median.
- Single-family detached house prices fell 13 percent, from \$890,766 in 2007 to \$775,000 in 2010, but increased by two percent between 2009 and 2010.
- Single-family attached prices fell nine percent, from \$638,102 in 2007 to \$578,750 in 2010, but fell three percent between 2009 and 2010.
- House sales volume in District 1 was up three percent in 2010, with 4,734 sales compared to 4,608 sales in 2009, but up 35 percent from 3,519 sales in 2007.
- Seventy-seven percent of the 2010 sales in District 1 were single-family detached houses, eight percent were single-family attached houses, and 15 percent were multifamily houses.
- District 1 accounted for 180 (nine percent) of all foreclosure auctions in the County for 2010. There were 35 foreclosure auctions in the first three quarters of 2011.

MEDIAN HOME SALES PRICE, 2010 DOLLARS

	2007	2008	2009	2010	change from 2007	change from 2009
single-family detached	890,766	854,285	762,302	775,000	-13%	2%
single-family attached	638,102	577,288	595,612	578,750	-9%	-3%

Source: Montgomery County Planning Department Land Use Database, January 2011

HOUSING UNITS SOLD

	2007	2008	2009	2010	from 2007 to 2010	from 2009 to 2010
all housing units	3,519	3,576	4,608	4,734	35%	3%
single-family detached	2,776	2,563	3,033	3,640	31%	20%
single-family attached	361	295	329	395	9%	20%
multifamily	382	718	1,246	699	83%	-44%

Source: Montgomery County Planning Department Land Use Database, January 2011

HOUSING SALES BY UNIT TYPE

	sales
single-family detached	77%
single-family attached	8%
multifamily	15%

Source: Montgomery County Planning Department Land Use Database, January 2011

RESIDENTIAL FORECLOSURES

	district 1	county	share of county
total countywide foreclosures since 2010	215	2,310	9.3%
2010	180	1,951	9.2%
2011 through 3rd quarter	35	359	9.7%

Source: Department of Housing and Community Development, 2011

SUPPLY

- Seventy-four percent of housing units in District 1 were built before 1980, compared to 57 percent Countywide.
- Single-family detached houses account for 61 percent of the housing stock in the district, compared to 50 percent Countywide.
- 69 affordable housing units (MPDUs) were approved in District 1 since the 2010, 40 percent of the Countywide approvals.

EXISTING HOUSING BY DECADE BUILT

decade	district	countywide
pre-1950	20.9%	12.8%
1950s	22.8%	17%
1960s	17.8%	14.2%
1970s	12.3%	13.3%
1980s	12.6%	23.7%
1990s	7.5%	10.8%
2000s	6%	8.1%
2010	0.1%	0.2%
pre-1980	73.8%	57.2%
after-1990	13.6%	19.1%

Source: Montgomery County Planning Department Land Use Database, January 2011

EXISTING HOUSING UNITS

type	district 1	countywide	share of county
all	80,564	356,763	23%
multifamily (condos and apartments)	25,325	114,549	22%
townhouse	5,774	65,526	9%
single-family detached	49,465	176,688	28%

Source: Montgomery County Planning Department Land Use Database, January 2011

MODERATELY PRICED DWELLING UNITS (MPDUs)

MPDUs	affordable housing	workforce housing	senior housing	total
69	0	0	0	69

Source: Montgomery County Planning Department Land Use Database

transportation costs

- The average household spends less on transportation in Bethesda and North Bethesda than the average household in Darnestown and Potomac.
- Average household transportation costs are lowest in North Bethesda at \$11,683 and highest in Darnestown at \$18,703.

ANNUAL TRANSPORTATION AND HOUSING COSTS

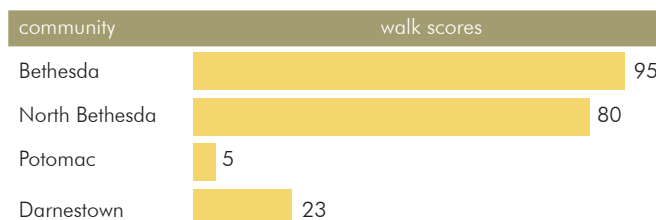
community	housing	transportation
Bethesda	\$36,696	\$13,778
North Bethesda	\$28,092	\$11,683
Potomac	\$55,224	\$16,395
Darnestown	\$46,440	\$18,703

Source: Urban Land Institute, Terwilliger Center Housing + Transportation Calculator

walk score

- The walkability of District 1 communities ranges from a “walkers’ paradise” to “car-dependent,” reflecting the varied access to transit and community facilities in communities from the Bethesda central business district to rural parts of Potomac.
- Potomac is the least walkable with a score of 5. Downtown Bethesda and North Bethesda are considered more walkable with scores of 95 and 80, respectively.

WALK SCORES



Source: WalkScore.com

retail

- District 1 residents spent \$4.6 billion on consumer purchases in 2011—25 percent of consumer spending Countywide.
- Sales by area retailers totaled \$3.8 billion—26 percent of retail sales in the County.
- Retail sales in District 1 were \$756 million less than retail spending, suggesting that many District 1 residents are traveling outside their home district to shop.
- The greatest retail leakage was for gas stations, general merchandise stores, and furniture and home furnishing stores, each of which captured less than 50 percent of potential consumer spending.
- Clothing, food and beverage stores, and auto dealers showed a net surplus, indicating that these categories attracted shoppers from outside District 1.

2011 RETAIL SPENDING AND SALES

	billions
consumer spending	\$4.6
retail sales	\$3.8

Source: Montgomery County Planning Department analysis of Claritas Site Reports data

RETAIL ACTIVITY

retail activity 2011	consumer spending	retail spending	capture rate	unmet consumer demand	retail surplus
Total	\$4,571,533,132	\$3,815,943,566	83%	\$755,589,566	\$
Building Material, Garden Equip Stores	473,876,406	287,819,930	61%	186,056,476	
Clothing and Clothing Accessories Stores	253,580,686	469,150,014	185%		215,569,328
Electronics and Appliance Stores	114,547,837	61,726,755	54%	52,821,082	
Food and Beverage Stores	499,722,644	642,188,170	129%		142,465,526
Foodservice and Drinking Places	481,083,496	415,848,025	86%	65,235,471	
Furniture and Home Furnishings Stores	124,377,681	60,898,404	49%	63,479,277	
Gasoline Stations	347,488,318	111,373,892	32%	236,114,426	
General Merchandise Stores	597,534,347	250,702,762	42%	346,831,585	
Health and Personal Care Stores	262,361,882	162,164,558	62%	100,197,324	
Miscellaneous Store Retailers	117,266,131	76,445,771	65%	40,820,360	
Motor Vehicle and Parts Dealers	824,874,338	989,247,309	120%		164,372,971
Non-Store Retailers	368,418,373	199,967,797	54%	168,450,576	
Sporting Goods, Hobby, Book, Music Stores	106,400,994	88,410,179	83%	17,990,815	

Source: Montgomery County Planning Department analysis of Claritas SiteReports data

DETAILED RETAIL ACTIVITY

retail activity 2011	consumer spending	retail sales	capture rate	unmet consumer demand	retail surplus
Automotive Dealers	\$717,942,138	\$ 976,545,543	136%	\$	\$258,603,405
Automotive Parts/Accsrs, Tire Stores	62,014,670	11,640,313	19%	50,374,357	
Beer, Wine and Liquor Stores	36,642,570	31,779,702	87%	4,862,868	
Book Stores and News Dealers	22,581,965	24,268,193	107%		1,686,228
Camera and Photographic Equipment Stores	5,409,257	6,037,972	112%		628,715
Childrens, Infants Clothing Stores	8,232,426	23,593,320	287%		15,360,894
Clothing Accessories Stores	4,542,490	4,405,376	97%	137,114	
Computer and Software Stores	24,330,227	22,347,812	92%	1,982,415	
Convenience Stores	20,569,098	16,889,429	82%	3,679,669	
Cosmetics, Beauty Supplies, Perfume Stores	9,550,607	18,247,035	191%		8,696,428
Department Stores Excl Leased Depts	314,513,983	233,072,321	74%	81,441,662	
Drinking Places Alcoholic Beverages	21,089,461	8,965,380	43%	12,124,081	
Family Clothing Stores	90,350,783	170,760,270	189%		80,409,487
Florists	10,243,330	7,227,703	71%	3,015,627	
Full Service Restaurants	220,431,521	230,175,746	104%		9,744,225
Furniture Stores	73,189,228	28,393,235	39%	44,795,993	
Gasoline Stations With Conv Stores	255,869,544	54,906,070	21%	200,963,474	
Gift, Novelty and Souvenir Stores	22,754,411	13,195,756	58%	9,558,655	
Hardware Stores	41,294,825	33,671,652	82%	7,623,173	
Hobby, Toys and Games Stores	21,035,705	16,967,716	81%	4,067,989	
Home Centers	177,192,149	141,488,689	80%	35,703,460	
Home Furnishing Stores	51,188,453	32,505,169	64%	18,683,284	
Household Appliances Stores	19,164,976	3,426,194	18%	15,738,782	
Jewelry Stores	52,227,566	89,028,115	170%		36,800,549
Limited Service Eating Places	200,057,190	137,530,724	69%	62,526,466	
Luggage and Leather Goods Stores	2,806,682	4,129,967	147%		1,323,285
Men's Clothing Stores	11,210,697	16,209,209	145%		4,998,512
Musical Instrument and Supplies Stores	8,382,296	10,253,334	122%		1,871,038
Nursery and Garden Centers	34,983,591	9,642,778	28%	25,340,813	
Office Supplies and Stationery Stores	31,248,846	25,032,677	80%	6,216,169	
Optical Goods Stores	10,297,589	19,771,626	192%		9,474,037
Other Building Materials Dealers	203,916,100	94,889,371	47%	109,026,729	
Other Clothing Stores	11,425,227	19,341,844	169%		7,916,617
Other Gasoline Stations	91,618,774	56,467,822	62%	35,150,952	
Other General Merchandise Stores	283,020,363	17,630,441	6%	265,389,922	
Other Health and Personal Care Stores	16,634,300	8,178,557	49%	8,455,743	
Other Miscellaneous Store Retailers	40,876,215	21,620,329	53%	19,255,886	
Other Motor Vehicle Dealers	44,917,530	1,061,453	2%	43,856,077	
Outdoor Power Equipment Stores	5,616,411	1,844,338	33%	3,772,073	
Paint and Wallpaper Stores	10,873,331	6,283,102	58%	4,590,229	
Pharmacies and Drug Stores	225,879,386	115,967,340	51%	109,912,046	
Prerecorded Tapes, CDs, Record Stores	11,458,046	1,595,255	14%	9,862,791	
Radio, Television, Electronics Stores	65,643,377	29,914,778	46%	35,728,599	
Sew/Needlework/Piece Goods Stores	5,463,801	3,763,855	69%	1,699,946	
Shoe Stores	28,860,971	38,404,628	133%		9,543,657
Special Foodservices	39,505,324	39,176,175	99%	329,149	
Specialty Food Stores	13,817,786	22,722,067	164%		8,904,281
Sporting Goods Stores	37,479,181	31,561,827	84%	5,917,354	
Supermarkets, Grocery (Ex Conv) Stores	428,693,190	570,796,972	133%		142,103,782
Used Merchandise Stores	12,143,329	9,369,306	77%	2,774,023	
Women's Clothing Stores	43,923,844	103,277,284	235%		59,353,440

Source: Montgomery County Planning Department analysis of Claritas SiteReports data

office

- The 2011 annual average office vacancy rate in District 1 was 12.0 percent, nearly two full percentage points below the Countywide rate of 13.9 percent.
- The 2011 12.0 percent office vacancy rate was lower than in 2010 (12.6 percent), but above the 8.8 percent vacancy rate in 2007.
- District 1's annual average rent was \$31.48 per square foot in 2011, 11 percent higher than the Countywide rate of \$28.24 per square foot.
- Office rents were virtually unchanged from 2010, but are below their five-year peak of \$34.26 per square foot in 2008.
- 19.9 percent of assessed value in District 1 is from nonresidential properties. The remaining 80.1 percent is from residential properties.

ANNUAL AVERAGE OFFICE VACANCY RATE



Source: Montgomery County Planning Department analysis of CoStar data

ANNUAL AVERAGE OFFICE LEASE RATE

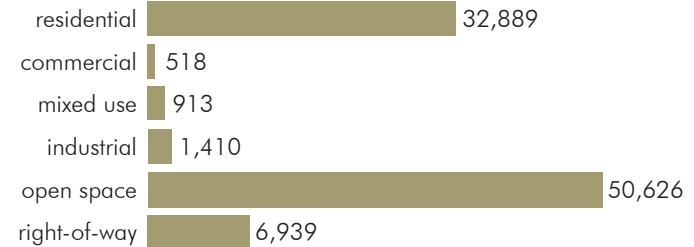


Source: Montgomery County Planning Department analysis of CoStar data

development activity

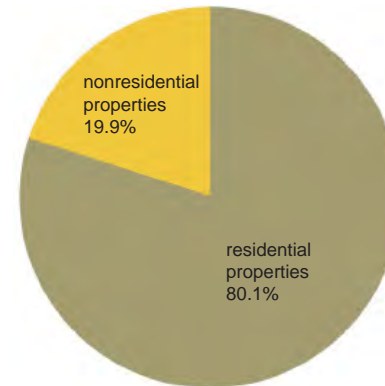
- The Residential Pipeline has 4,820 dwelling units in November 2011, 29 percent of the Countywide pipeline.
- The Nonresidential Pipeline has 6.1 million GFA in November 2011, 30 percent of the Countywide pipeline.

ACRES ZONED BY LAND USE CATEGORY



Source: Montgomery County Planning Department, 2010

ASSESSED VALUE BY PROPERTY TYPE



Source: Montgomery County Planning Department and Maryland State Department of Assessment and Taxation, 2010

APPROVED RESIDENTIAL UNITS AND COMMERCIAL SQUARE FOOTAGE REMAINING TO BE BUILT

district	units	square feet
1	4,820	6,105,891

Source: Montgomery County Planning Department, November 2011 Pipeline



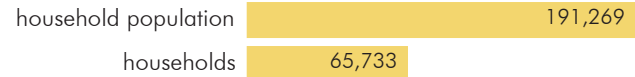


demographics

POPULATION AND HOUSEHOLDS

- In 2010, District 2 had 191,269 residents living in 65,733 households. Between 2010 and 2040, District 2 is forecasted to add 48,027 residents—a 26 percent increase. Twenty-one percent of the County’s population growth is forecasted to occur in District 2.
- The number of District 2 households is forecasted to grow by 34 percent to 87,436 in 2040—accounting for 22 percent of household growth Countywide.
- Twenty-three percent of District 2 adults ages 25 and older have earned a graduate degree, compared to 30 percent Countywide.
- Thirty-eight percent of District 2 residents ages five and up speak a language other than English at home, compared to 39 percent Countywide.
- At \$101,165, District 2’s median household income was 14 percent above the County median of \$89,155.

POPULATION AND HOUSEHOLDS, 2010



Source: U.S Census Bureau, 2010 U.S. Census

HOUSEHOLD POPULATION FORECAST, 2010-2040

year	district 2	county	share of county
2010	186,861	959,667	19%
2015	192,648	1,001,386	19%
2020	202,483	1,051,149	19%
2025	218,917	1,093,267	20%
2030	229,713	1,136,423	20%
2035	235,899	1,167,742	20%
2040	234,888	1,185,623	20%
forecasted growth, 2010 to 2040	48,027	225,956	21%
percent growth %	26	24	

Source: U.S Census Bureau, 2010 U.S. Census; Montgomery County Planning Department Round 8 Cooperative Forecast

HOUSEHOLD FORECAST, 2010-2040

year	district 2	county	share of county
2010	65,185	361,030	18%
2015	67,916	376,536	18%
2020	72,252	397,237	18%
2025	78,954	415,795	19%
2030	83,967	436,202	19%
2035	86,747	451,446	19%
2040	87,436	461,469	19%
forecasted growth, 2010 to 2040	22,252	100,439	22%
percent growth %	34	30	

Source: U.S Census Bureau, 2010 U.S. Census; Montgomery County Planning Department Round 8 Cooperative Forecast

POPULATION AND HOUSEHOLD GROWTH, 2010-2040

household population	48,027
households	22,252

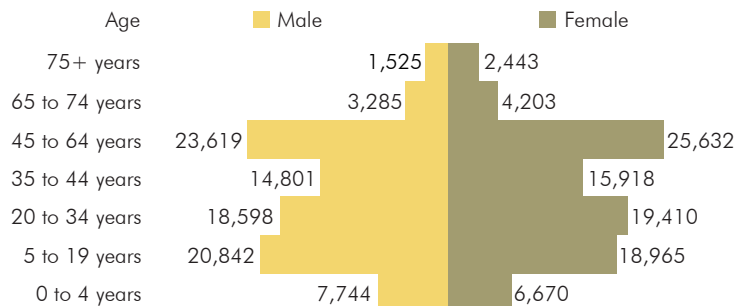
Source: U.S Census Bureau, 2010 U.S. Census; Montgomery County Planning Department Round 8 Cooperative Forecast

POPULATION AND HOUSEHOLD COUNT, 2010

	district	county
household population	191,269	962,877
households	65,733	357,086

Source: U.S Census Bureau, 2010 U.S. Census

AGE AND GENDER



Source: U.S Census Bureau, 2006-2010 American Community Survey

AGE DISTRIBUTION

age	district 2	county
0 to 4 years	8%	7%
5 to 19 years	22%	19%
20 to 34 years	21%	19%
35 to 44 years	17%	14%
45 to 64 years	27%	28%
65 to 74 years	4%	6%
75+ years	2%	6%

Source: U.S Census Bureau, 2006-2010 American Community Survey, 2010 American Community Survey

RACE AND ETHNICITY

race	district 2	county
non-Hispanic White	46%	49%
Black/African American	17%	17%
Hispanic	16%	17%
Asian or Pacific Islander	17%	14%
other	4%	3%

Source: U.S Census Bureau, 2006-2010 American Community Survey, 2010 American Community Survey

EDUCATIONAL ATTAINMENT

education	district 2	county
less than high school	8%	9%
high school graduate	16%	14%
associate/trade school	25%	20%
bachelor degree	28%	26%
graduate degree	23%	30%

Source: U.S Census Bureau, 2006-2010 American Community Survey, 2010 American Community Survey

FOREIGN LANGUAGE SPEAKERS

language	district 2	county
share of residents (ages 5+)	38%	39%
English-proficient	22%	24%
not English-proficient	15%	16%

Source: U.S Census Bureau, 2006-2010 American Community Survey, 2010 American Community Survey

district 2

HOUSEHOLD INCOME %

	district 2	county
Under \$50,000	21	27
\$50,000 to \$99,999	31	28
\$100,000 to \$149,999	24	19
\$150,000 to \$199,999	13	11
\$200,000+	11	15
median household income	\$101,165	\$89,155

Source: U.S Census Bureau, 2006-2010 American Community Survey, 2010 American Community Survey

HOUSING TENURE %

	district 2	county
rate of homeownership	78	66

Source: U.S Census Bureau, 2006-2010 American Community Survey, 2010 American Community Survey

HOUSEHOLD TYPES %

	district 2	county
family	74	68
living alone	20	26
other	6	6

Source: U.S Census Bureau, 2006-2010 American Community Survey, 2010 American Community Survey

PERSONS IN HOUSEHOLD %

	district 2	county
one	20	26
two	28	31
three	20	17
four	18	15
five+	13	11

Source: U.S Census Bureau, 2006-2010 American Community Survey, 2010 American Community Survey

HOUSING COSTS

	district 2	county
median monthly housing costs - homeowner	\$2,326	\$2,498
median monthly housing costs - renter	\$1,414	\$1,466
cost burdened households* - homeowner	39%	37%
cost burdened households* - renter	49%	54%

* spending more than 30% of income on housing

Source: U.S Census Bureau, 2006-2010 American Community Survey, 2010 American Community Survey

employment

JOBS AND INDUSTRIES

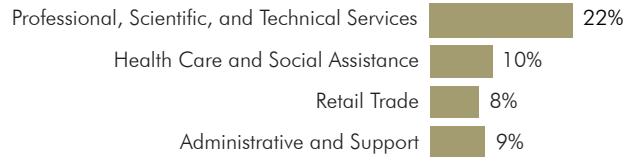
- 3,322 job establishments in District 2 employ 39,348 workers. The District contains 8 percent of all County jobs.
- Twenty-two percent of all District 2 job establishments are in the professional, scientific, and technical services sector.
- Educational services are 14 percent of the District's jobs base. Retail trade is second with 12 percent of district jobs.
- The District's largest employers include Montgomery County Public Schools, the US Department of Energy, and Hughes Network Systems.

EMPLOYMENT BASE

	jobs	share of jobs	county	share of county sector
Accommodation and Food Services	3,307	8%	33,653	10%
Administrative and Support	2,697	7%	32,447	8%
Agriculture, Forestry, Fishing, and Hunting	31	0%	550	6%
Arts, Entertainment, and Recreation	444	1%	7,042	6%
Construction	2,213	6%	24,843	9%
Educational Services	5,675	14%	37,375	15%
Finance and Insurance	917	2%	22,046	4%
Health Care and Social Assistance	3,613	9%	75,922	5%
Information	473	1%	15,580	3%
Management of Companies and Enterprises	86	0%	9,402	1%
Manufacturing	4,250	11%	13,321	32%
Mining, Quarrying, and Oil and Gas Extraction	0	0%	178	0%
Other Services (except Public Administration)	1,186	3%	24,288	5%
Professional, Scientific, and Technical Services	4,508	11%	74,166	6%
Public Administration	3,249	8%	60,536	5%
Real Estate and Rental and Leasing	638	2%	11,973	5%
Retail Trade	4,742	12%	49,002	10%
Transportation and Warehousing	536	1%	7,257	7%
Unclassified	0	0%	0	0%
Utilities	0	0%	629	0%
Wholesale Trade	783	2%	9,790	8%

Source: Montgomery County Planning Department analysis of BLS data, 2011

JOB ESTABLISHMENTS-INDUSTRY PERCENTAGE



Source: Montgomery County Planning Department analysis of BLS data, 2011

JOB ESTABLISHMENTS

Professional, Scientific, and Technical Services	735
Health Care and Social Assistance	327
Retail Trade	254
Administrative and Support	307
other industry	1,702
total industry	3,325

Source: Montgomery County Planning Department analysis of BLS data, 2011

TEN LARGEST EMPLOYERS

1,000 to 4,000 employees	
Montgomery County Public Schools	
Department of Energy	
Hughes Network Systems	
Montgomery County Government	
500 to 999 employees	
Thales Communications	
250 to 499 employees	
Montgomery County College	
Qiagen Sciences	
Giant Food Stores	
JDS Uniphase Corp	
Boeing	

Source: Montgomery County Planning analysis of BLS data

RESIDENT WORKFORCE

- In 2010, there were 100,652 employed persons ages 16 and up living in District 2.
- District 2 accounts for 20 percent of the County's resident labor force.
- Most employed District 2 residents (73 percent) work in Montgomery County, compared to 59 percent of employed residents Countywide.
- In District 2, one in five employed residents (19 percent) commutes to a job located outside of Maryland compared to 30 percent Countywide.

RESIDENT WORKFORCE

	district 2	county	share of county
employed residents ages 16+	100,652	513,199	20%

Source: U.S Census Bureau, 2006-2010 American Community Survey, 2010 American Community Survey

WORK LOCATION OF RESIDENTS

commute	district 2	county
inside Montgomery County	73%	59%
elsewhere in Maryland	9%	11%
work outside of Maryland	19%	30%

Source: U.S Census Bureau, 2006-2010 American Community Survey, 2010 American Community Survey

COMMUTE MODE OF RESIDENTS

	district 2	county
drive alone	72%	65%
public transit/rail	10%	15%
carpool	12%	11%
work at home	4%	6%
walk/bike/other	2%	3%

Source: U.S Census Bureau, 2006-2010 American Community Survey, 2010 American Community Survey

AVERAGE COMMUTE TIME OF RESIDENTS

	district 2	county
all commutes (in minutes)	35	34

Source: U.S Census Bureau, 2006-2010 American Community Survey, 2010 American Community Survey

housing

MARKET

- The 2010 median sales price for a District 2 single-family detached house was \$460,000, one percent above the Countywide median.
- The 2010 median single-family attached price was \$220,000, 19 percent below the County median.
- Single-family detached house prices fell 25 percent between 2007 and 2010, but remained constant between 2009 and 2010. Single-family attached house prices were down 36 percent between 2007 and 2010, but fell four percent between 2009 and 2010.
- House sales volume was up 36 percent in 2010 with 4,428 sales compared to 3,251 sales in 2009, but up 19 percent from 3,712 sales in 2007.
- Thirty-eight percent of the District 2 sales in 2010 were single-family detached houses, 46 percent were single-family attached houses and 16 percent were multifamily houses.
- District 2 accounted for 613 (32 percent) of all foreclosure auctions in the County in 2010. There were 113 foreclosure auctions in the first three quarters of 2011.

MEDIAN HOME SALES PRICE, 2010 DOLLARS

	2007	2008	2009	2010	change from 2007	change from 2009
single-family detached	609,864	531,713	466,900	460,000	-25%	-1%
single-family attached	341,793	283,479	229,453	220,000	-36%	-4%

Source: Montgomery County Planning Department Land Use Database, January 2011

HOUSING UNITS SOLD

	2007	2008	2009	2010	from 2007 to 2010	from 2009 to 2010
all housing units	3,712	3,526	3,251	4,428	19%	36%
single-family detached	1,307	1,239	1,484	1,669	28%	12%
single-family attached	1,743	1,477	1,767	2,029	16%	15%
multifamily	662	810	0	730	10%	N.A.

Source: Montgomery County Planning Department Land Use Database, January 2011

HOUSING SALES BY UNIT TYPE

	sales
single-family detached	38%
single-family attached	46%
multifamily	16%

Source: Montgomery County Planning Department Land Use Database, January 2011

RESIDENTIAL FORECLOSURES

	district 2	county	share of county
total countywide foreclosures since 2010	726	2,310	31.4%
2010	613	1,951	31.4%
2011 through 3rd quarter	113	359	31.5%

Source: Department of Housing and Community Development, 2011

SUPPLY

- Twenty-eight percent of housing units in District 2 were built before 1980, compared to 57 percent Countywide.
- Single-family detached houses account for 40 percent of the housing stock in the district, compared to 50 percent Countywide.
- 36 affordable housing units (MPDUs) were approved in District 2 since the 2010, 21 percent of the Countywide approvals.

EXISTING HOUSING BY DECADE BUILT

decade	district	countywide
pre-1950	2.1%	12.8%
1950s	1.5%	17.0%
1960s	4.1%	14.2%
1970s	20.6%	13.3%
1980s	37.5%	23.7%
1990s	17.7%	10.8%
2000s	15.7%	8.1%
2010	0.7%	0.2%
pre-1980	28.4%	57.2%
after-1990	34.1%	19.1%

Source: Montgomery County Planning Department Land Use Database, January 2011

EXISTING HOUSING UNITS

type	district 2	countywide	share of county
all	62,851	356,763	18%
multifamily (condos and apartments)	11,498	114,549	10%
townhouse	26,130	65,526	40%
single-family detached	25,223	176,688	14%

Source: Montgomery County Planning Department Land Use Database, January 2011

MODERATELY PRICED DWELLING UNITS (MPDUs)

MPDUs	affordable housing	workforce housing	senior housing	total
36	0	0	0	36

Source: Montgomery County Planning Department Land Use Database

transportation costs

- Annual average transportation costs are lowest in Germantown (\$14,532) and highest in Damascus (\$16,949).
- Damascus households spend an average of 17 percent more on transportation and 35 percent more on housing than Germantown households.

ANNUAL TRANSPORTATION AND HOUSING COSTS

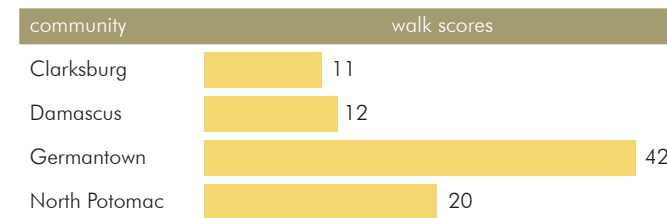
community	housing	transportation
Clarksburg	\$29,688	\$16,433
Damascus	\$29,208	\$16,949
Germantown	\$21,636	\$14,532
North Potomac	\$33,804	\$16,903

Source: Urban Land Institute, Terwilliger Center Housing + Transportation Calculator

walk score

- All communities in District 2 are mostly car-dependent, reflecting limited pedestrian access to transit and community amenities.
- Germantown is the most walkable with a score of 42, while Clarksburg and Damascus are the least walkable with scores of 11 and 12 respectively.
- The Germantown Plan recommends an expanded network of roadways, streets, mid-block pedestrian connections, sidewalks, trails, and bikeways designed to link the community to desired destinations such as transit, schools, and commercial services.

WALK SCORES



Source: WalkScore.com

retail

- District 2 residents spent \$3.4 billion on consumer purchases in 2011—19 percent of consumer spending Countywide.
- Sales by area retailers totaled \$1.7 billion—12 percent of retail sales in the County.
- District 2 had a \$1.7 billion retail opportunity gap, with retailers capturing 51 percent of retail spending by District residents. All major retail categories showed leakage, led by gasoline stations, which captured just 34 percent of resident spending.
- Food and beverage stores had the lowest leakage, capturing 93 percent of local spending.

2011 RETAIL SPENDING AND SALES

	billions
consumer spending	\$3.4
retail sales	\$1.7

Source: Montgomery County Planning Department analysis of Claritas Site Reports data

RETAIL ACTIVITY

retail activity 2011	consumer spending	retail spending	capture rate	unmet consumer demand	retail surplus
Total	\$3,404,804,053	\$1,720,961,514	51%	\$1,683,842,539	\$ -
Building Material, Garden Equip Stores	331,394,370	171,947,480	52%	159,446,890	
Clothing and Clothing Accessories Stores	184,736,363	96,593,716	52%	88,142,647	
Electronics and Appliance Stores	81,813,410	35,770,717	44%	46,042,693	
Food and Beverage Stores	397,099,825	367,526,167	93%	29,573,658	
Foodservice and Drinking Places	364,894,411	212,459,288	58%	152,435,123	
Furniture and Home Furnishings Stores	80,201,410	28,868,249	36%	51,333,161	
Gasoline Stations	292,113,428	98,403,826	34%	193,709,602	
General Merchandise Stores	451,290,254	179,812,010	40%	271,478,244	
Health and Personal Care Stores	183,289,344	112,557,317	61%	70,732,027	
Miscellaneous Store Retailers	87,027,640	16,202,972	19%	70,824,668	
Motor Vehicle and Parts Dealers	613,926,765	228,295,749	37%	385,631,016	
Non-Store Retailers	262,370,949	143,454,514	55%	118,916,435	
Sporting Goods, Hobby, Book, Music Stores	74,645,883	29,069,510	39%	45,576,373	

Source: Montgomery County Planning Department analysis of Claritas SiteReports data

DETAILED RETAIL ACTIVITY

retail activity 2011	consumer spending	retail sales	capture rate	unmet consumer demand	retail surplus
Automotive Dealers	\$544,099,169	\$206,944,644	38%	\$337,154,525	\$ -
Automotive Parts/Accsrs, Tire Stores	43,692,298	13,415,950	31%	30,276,348	
Beer, Wine and Liquor Stores	26,004,762	22,743,835	87%	3,260,927	
Book Stores and News Dealers	14,954,450	5,897,407	39%	9,057,043	
Camera and Photographic Equipment Stores	3,955,801	2,965,428	75%	990,373	
Childrens, Infants Clothing Stores	7,160,098	7,017,500	98%	142,598	
Clothing Accessories Stores	3,257,167	648,390	20%	2,608,777	
Computer and Software Stores	17,586,438	10,422,544	59%	7,163,894	
Convenience Stores	16,932,514	15,918,766	94%	1,013,748	
Cosmetics, Beauty Supplies, Perfume Stores	6,565,440	3,785,537	58%	2,779,903	
Department Stores Excl Leased Depts	233,741,476	145,798,487	62%	87,942,989	
Drinking Places Alcoholic Beverages	15,482,911	36,721	0%	15,446,190	
Family Clothing Stores	68,805,383	38,597,174	56%	30,208,209	
Florists	7,112,362	1,180,519	17%	5,931,843	
Full Service Restaurants	166,187,422	108,249,862	65%	57,937,560	
Furniture Stores	45,672,418	5,730,536	13%	39,941,882	
Gasoline Stations With Conv Stores	215,726,537	65,626,402	30%	150,100,135	
Gift, Novelty and Souvenir Stores	16,096,442	4,064,518	25%	12,031,924	
Hardware Stores	29,519,229	11,630,581	39%	17,888,648	
Hobby, Toys and Games Stores	15,696,044	7,479,672	48%	8,216,372	
Home Centers	122,743,322	91,917,724	75%	30,825,598	
Home Furnishing Stores	34,528,992	23,137,713	67%	11,391,279	
Household Appliances Stores	13,845,748	3,827,508	28%	10,018,240	
Jewelry Stores	29,826,201	16,346,234	55%	13,479,967	
Limited Service Eating Places	153,168,584	80,537,334	53%	72,631,250	
Luggage and Leather Goods Stores	1,985,627	305,924	15%	1,679,703	
Men's Clothing Stores	8,098,708	3,205,532	40%	4,893,176	
Musical Instrument and Supplies Stores	5,471,307	2,290,023	42%	3,181,284	
Nursery and Garden Centers	25,620,146	2,294,606	9%	23,325,540	
Office Supplies and Stationery Stores	21,611,225	4,105,225	19%	17,506,000	
Optical Goods Stores	7,678,328	8,619,527	112%		941,199
Other Building Materials Dealers	142,731,283	62,061,075	43%	80,670,208	
Other Clothing Stores	8,612,280	7,754,059	90%	858,221	
Other Gasoline Stations	76,386,891	32,777,424	43%	43,609,467	
Other General Merchandise Stores	217,548,779	34,013,523	16%	183,535,256	
Other Health and Personal Care Stores	11,672,502	4,333,061	37%	7,339,441	
Other Miscellaneous Store Retailers	33,649,102	6,366,921	19%	27,282,181	
Other Motor Vehicle Dealers	26,135,298	7,935,155	30%	18,200,143	
Outdoor Power Equipment Stores	3,310,070	2,081,762	63%	1,228,308	
Paint and Wallpaper Stores	7,470,320	1,961,731	26%	5,508,589	
Pharmacies and Drug Stores	157,373,073	95,819,192	61%	61,553,881	
Prerecorded Tapes, CDs, Record Stores	7,673,156	4,932,314	64%	2,740,842	
Radio, Television, Electronics Stores	46,425,423	18,555,237	40%	27,870,186	
Sew/Needlework/Piece Goods Stores	3,925,765	806,226	21%	3,119,539	
Shoe Stores	23,727,667	13,973,593	59%	9,754,074	
Special Foodservices	30,055,495	23,635,371	79%	6,420,124	
Specialty Food Stores	11,277,477	3,025,462	27%	8,252,015	
Sporting Goods Stores	26,925,160	7,663,869	28%	19,261,291	
Supermarkets, Grocery (Ex Conv) Stores	342,885,072	325,838,104	95%	17,046,968	
Used Merchandise Stores	8,558,509	485,789	6%	8,072,720	
Women's Clothing Stores	33,263,234	8,745,310	26%	24,517,924	

Source: Montgomery County Planning Department analysis of Claritas SiteReports data

office

- The 2011 annual average office vacancy rate in District 2 was 25.3 percent, nearly double the Countywide rate of 13.9 percent.
- 2011 office vacancies were lower than in 2010 (27.8 percent), but remain above the 14.7 percent vacancy rate in 2007.
- District 2's annual average office rent was \$23.14 per square foot in 2011, \$5.11 below the Countywide rate of \$28.24 per square foot.
- Average office rents in 2011 were up slightly from \$23.08 in 2010 and remain above the pre-recession level of \$22.48 in 2007.
- 19.8 percent of assessed value in District 2 is from nonresidential properties. The remaining 80.2 percent of assessed value is from residential properties.

ANNUAL AVERAGE OFFICE VACANCY RATE



Source: Montgomery County Planning Department analysis of CoStar data

ANNUAL AVERAGE OFFICE LEASE RATE

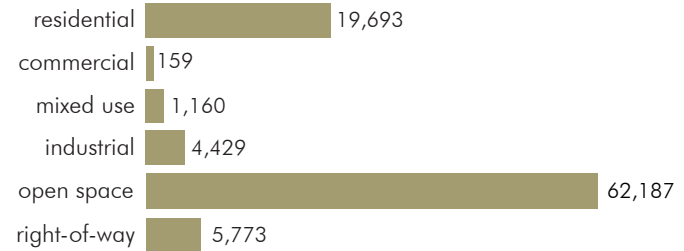


Source: Montgomery County Planning Department analysis of CoStar data

development activity

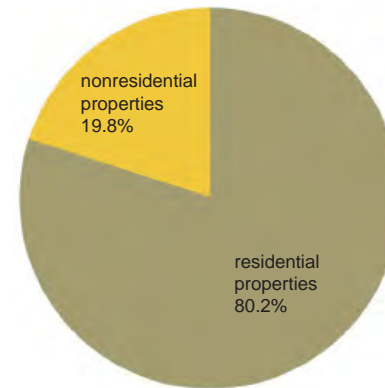
- The Residential Pipeline has 5,657 dwelling units in November 2011, 34 percent of the Countywide pipeline.
- The Nonresidential Pipeline has 6.0 million GFA in November 2011, 30 percent of the Countywide pipeline.

ACRES ZONED BY LAND USE CATEGORY



Source: Montgomery County Planning Department, 2010

ASSESSED VALUE BY PROPERTY TYPE



Source: Montgomery County Planning Department and Maryland State Department of Assessment and Taxation, 2010

APPROVED RESIDENTIAL UNITS AND COMMERCIAL SQUARE FOOTAGE REMAINING TO BE BUILT

district	units	square feet
2	5,657	6,036,516

Source: Montgomery County Planning Department, November 2011 Pipeline



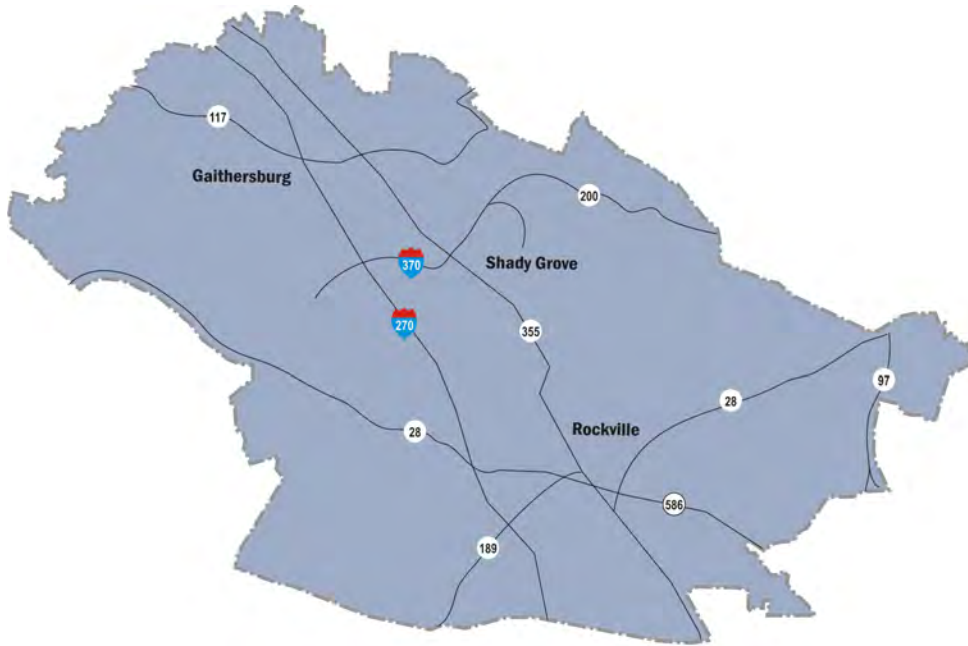
NORTH POTOMAC



AG RESERVE



GERMANTOWN



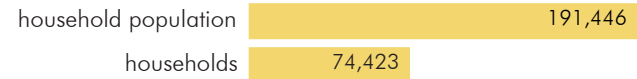
 Council District 3 Boundary

demographics

POPULATION AND HOUSEHOLDS

- In 2010, District 3 had 191,446 residents living in 74,423 households.
- Between 2010 and 2040, District 3 is forecasted to add 73,044 residents—a 38 percent increase. Thirty-two percent of the County’s population growth is forecasted to occur in District 3.
- The number of District 3 households is forecasted to increase by 45 percent to reach 107,395 in 2040—accounting for 33 percent of household growth Countywide.
- Twenty-nine percent of District 3 adults ages 25 and older have earned a graduate degree, compared to 30 percent Countywide.
- Forty-two percent of District 3 residents ages five and up speak a language other than English at home, compared to 39 percent Countywide.
- At \$94,640, District 3’s median household income was six percent above the County median of \$89,155.

POPULATION AND HOUSEHOLDS, 2010



Source: U.S Census Bureau, 2010 U.S. Census

HOUSEHOLD POPULATION FORECAST, 2010-2040

year	district 3	county	share of county
2010	190,076	959,667	20%
2015	196,843	1,001,386	20%
2020	209,092	1,051,149	20%
2025	223,144	1,093,267	20%
2030	239,714	1,136,423	21%
2035	254,041	1,167,742	22%
2040	263,120	1,185,623	22%
forecasted growth, 2010 to 2040	73,044	225,956	32%
percent growth %	38	24	-

Source: U.S Census Bureau, 2010 U.S. Census; Montgomery County Planning Department Round 8 Cooperative Forecast

HOUSEHOLD FORECAST, 2010-2040

year	district 3	county	share of county
2010	73,951	361,030	20%
2015	77,036	376,536	20%
2020	82,388	397,237	21%
2025	88,862	415,795	21%
2030	96,782	436,202	22%
2035	103,175	451,446	23%
2040	107,395	461,469	23%
forecasted growth, 2010 to 2040	33,444	100,439	33%
percent growth %	45	30	-

Source: U.S Census Bureau, 2010 U.S. Census; Montgomery County Planning Department Round 8 Cooperative Forecast

POPULATION AND HOUSEHOLD GROWTH, 2010-2040



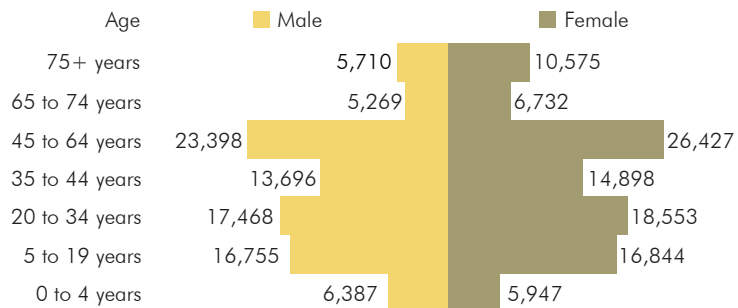
Source: U.S Census Bureau, 2010 U.S. Census; Montgomery County Planning Department Round 8 Cooperative Forecast

POPULATION AND HOUSEHOLD COUNT, 2010

	district	county
household population	191,446	962,877
households	74,423	357,086

Source: U.S Census Bureau, 2010 U.S. Census

AGE AND GENDER



Source: U.S. Census Bureau, 2006-2010 American Community Survey

AGE DISTRIBUTION

age	district 3	county
0 to 4 years	7%	7%
5 to 19 years	18%	19%
20 to 34 years	19%	19%
35 to 44 years	15%	14%
45 to 64 years	26%	28%
65 to 74 years	6%	6%
75+ years	9%	6%

Source: U.S Census Bureau, 2006-2010 American Community Survey, 2010 American Community Survey

RACE AND ETHNICITY

race	district 3	county
non-Hispanic White	52%	49%
Black/African American	10%	17%
Hispanic	16%	17%
Asian or Pacific Islander	19%	14%
other	2%	3%

Source: U.S Census Bureau, 2006-2010 American Community Survey, 2010 American Community Survey

EDUCATIONAL ATTAINMENT

education	district 3	county
less than high school	9%	9%
high school graduate	15%	14%
associate/trade school	20%	20%
bachelor degree	27%	26%
graduate degree	29%	30%

Source: U.S Census Bureau, 2006-2010 American Community Survey, 2010 American Community Survey

FOREIGN LANGUAGE SPEAKERS %

language	district 3	county
share of residents (ages 5+)	42%	39%
English-proficient	24%	24%
not English-proficient	18%	16%

Source: U.S Census Bureau, 2006-2010 American Community Survey, 2010 American Community Survey

district 3

HOUSEHOLD INCOME

	district 3	county
Under \$50,000	27%	27%
\$50,000 to \$99,999	30%	28%
\$100,000 to \$149,999	20%	19%
\$150,000 to \$199,999	11%	11%
\$200,000+	12%	15%
median household income	\$94,640	\$89,155

Source: U.S Census Bureau, 2006-2010 American Community Survey, 2010 American Community Survey

HOUSING TENURE

	district 3	county
rate of homeownership	65%	66%

Source: U.S Census Bureau, 2006-2010 American Community Survey, 2010 American Community Survey

HOUSEHOLD TYPES

	district 3	county
family	66%	68%
living alone	28%	26%
other	6%	6%

Source: U.S Census Bureau, 2006-2010 American Community Survey, 2010 American Community Survey

PERSONS IN HOUSEHOLD

	district 3	county
one	28%	26%
two	33%	31%
three	16%	17%
four	15%	15%
five+	9%	11%

Source: U.S Census Bureau, 2006-2010 American Community Survey, 2010 American Community Survey

HOUSING COSTS

	district 3	county
median monthly housing costs - homeowner	\$2,483	\$2,498
median monthly housing costs - renter	\$1,511	\$1,466
cost burdened households* - homeowner	37%	37%
cost burdened households* - renter	49%	54%

* spending more than 30% of income on housing

Source: U.S Census Bureau, 2006-2010 American Community Survey, 2010 American Community Survey

employment

JOBS AND INDUSTRIES

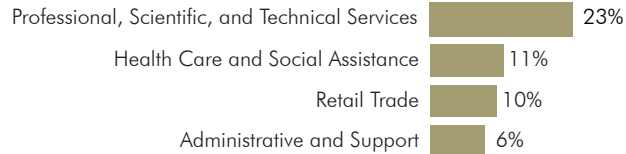
- 8,449 job establishments in District 3 employ 156,876 workers. The District contains 31 percent of all County jobs.
- 23 percent of all job establishments in District 3 are in the professional, scientific, and technical services sector.
- Professional and technical services are 20 percent of the District's jobs base. Health care is 13 percent.
- The District's largest employers are Montgomery County Public Schools, Montgomery County Government, and Shady Grove Adventist Hospital.

EMPLOYMENT BASE

	jobs	share of jobs	county	share of county sector
Accommodation and Food Services	10,166	6%	33,653	30%
Administrative and Support	8,191	5%	32,447	25%
Agriculture, Forestry, Fishing, and Hunting	12	0%	550	2%
Arts, Entertainment, and Recreation	1,964	1%	7,042	28%
Construction	7,264	5%	24,843	29%
Educational Services	11,743	7%	37,375	31%
Finance and Insurance	6,718	4%	22,046	30%
Health Care and Social Assistance	20,156	13%	75,922	27%
Information	4,778	3%	15,580	31%
Management of Companies and Enterprises	2,161	1%	9,402	23%
Manufacturing	5,470	3%	13,321	41%
Mining, Quarrying, and Oil and Gas Extraction	2	0%	178	1%
Other Services (except Public Administration)	5,987	4%	24,288	25%
Professional, Scientific, and Technical Services	30,939	20%	74,166	42%
Public Administration	13,882	9%	60,536	23%
Real Estate and Rental and Leasing	3,530	2%	11,973	29%
Retail Trade	14,881	9%	49,002	30%
Transportation and Warehousing	3,705	2%	7,257	51%
Unclassified	0	0%	0	0%
Utilities	220	0%	629	35%
Wholesale Trade	5,106	3%	9,790	52%

Source: Montgomery County Planning Department analysis of BLS data, 2011

JOB ESTABLISHMENTS-INDUSTRY PERCENTAGE



Source: Montgomery County Planning Department analysis of BLS data, 2011

JOB ESTABLISHMENTS

Professional, Scientific, and Technical Services	8,451
Health Care and Social Assistance	1,983
Retail Trade	910
Administrative and Support	867
other industry	518
total industry	4,173

Source: Montgomery County Planning Department analysis of BLS data, 2011

TEN LARGEST EMPLOYERS

4000+ employees	
Montgomery County Public Schools	
Montgomery County Government	
Adventist Healthcare	
2,000 to 3,999 employees	
US Department of Commerce	
Lockheed Martin	
Westat Research	
Montgomery College	
Medimmune LLC	
1,000 to 2,999 employees	
US Postal Service	
Sodhexo	

Source: Montgomery County Planning analysis of BLS data

RESIDENT WORKFORCE

- In 2010, there were 98,140 employed persons ages 16 and up living in District 3.
- District 3 accounts for 19 percent of the County's resident labor force.
- Most employed residents in District 3 (68 percent) work in Montgomery County, compared to 59 percent of residents Countywide.
- Almost one quarter of District 3 employed residents (24 percent) work outside of Maryland compared to 30 percent Countywide.

RESIDENT WORKFORCE

	district 3	county	share of county
employed residents ages 16+	98,140	513,199	19%

Source: U.S Census Bureau, 2006-2010 American Community Survey, 2010 American Community Survey

WORK LOCATION OF RESIDENTS

commute	district 3	county
inside Montgomery County	68%	59%
elsewhere in Maryland	8%	11%
work outside of Maryland	24%	30%

Source: U.S Census Bureau, 2006-2010 American Community Survey, 2010 American Community Survey

COMMUTE MODE OF RESIDENTS

	district 3	county
drive alone	68%	65%
public transit/rail	14%	15%
carpool	10%	11%
work at home	5%	6%
walk/bike/other	3%	3%

Source: U.S Census Bureau, 2006-2010 American Community Survey, 2010 American Community Survey

AVERAGE COMMUTE TIME OF RESIDENTS

	district 3	county
all commutes (in minutes)	31	34

Source: U.S Census Bureau, 2006-2010 American Community Survey, 2010 American Community Survey

housing

MARKET

- The 2010 median sales price for a District 3 single-family detached house was \$415,000, nine percent below the Countywide median. The 2010 median single-family attached home price was \$360,000, 33 percent above the County median.
- Single-family detached house prices fell 26 percent between 2007 and 2010, but only fell three percent between 2009 and 2010.
- Single-family attached prices were down 14 percent between 2007 and 2010, but increased by six percent between 2009 and 2010.
- House sales volume was down 31 percent from 5,908 sales in 2009 compared to 4,099 sales in 2010, but up 32 percent from 3,098 sales in 2007.
- Forty-three percent of the sales in 2010 were single-family detached homes, 22 percent were single-family attached, and 35 percent were multifamily.
- District 3 accounted for 377 (19 percent) of all foreclosure auctions in the County in 2010. There were 65 foreclosure auctions in the first three quarters of 2011.

MEDIAN HOME SALES PRICE, 2010 DOLLARS

	2007	2008	2009	2010	change from 2007	change from 2009
single-family detached	563,696	455,754	426,889	415,000	-26%	-3%
single-family attached	420,669	358,430	338,462	360,000	-14%	6%

Source: Montgomery County Planning Department Land Use Database, January 2011

HOUSING UNITS SOLD

	2007	2008	2009	2010	from 2007 to 2010	from 2009 to 2010
all housing units	3,098	5,103	5,908	4,099	32%	-31%
single-family detached	1,552	1,453	1,725	1,780	15%	3%
single-family attached	820	802	899	898	10%	0%
multifamily	726	2,848	3,284	1,421	96%	-57%

Source: Montgomery County Planning Department Land Use Database, January 2011

HOUSING SALES BY UNIT TYPE

	sales
single-family detached	43%
single-family attached	22%
multifamily	35%

Source: Montgomery County Planning Department Land Use Database, January 2011

RESIDENTIAL FORECLOSURES

	district 3	county	share of county
total countywide foreclosures since 2010	442	2,310	19.1%
2010	377	1,951	19.3%
2011 through 3rd quarter	65	359	18.1%

Source: Department of Housing and Community Development, 2011

SUPPLY

- Fifty-five percent of housing units in District 3 were built before 1980, compared to 57 percent Countywide.
- Single-family detached homes account for 38 percent of the housing stock in the District, compared to 50 percent Countywide.
- No affordable housing units have been approved since 2010.

EXISTING HOUSING BY DECADE BUILT

decade	district 3	countywide
pre-1950	4.1%	12.8%
1950s	12.8%	17.0%
1960s	20.7%	14.2%
1970s	16.8%	13.3%
1980s	24.2%	23.7%
1990s	12.7%	10.8%
2000s	8.6%	8.1%
2010	0.1%	0.2%
pre-1980	54.5%	57.2%
after-1990	21.3%	19.1%

Source: Montgomery County Planning Department Land Use Database, January 2011

EXISTING HOUSING UNITS

type	district 3	countywide	share of county
all	75,812	356,763	21%
multifamily (condos and apartments)	31,720	114,549	28%
townhouse	15,112	65,526	23%
single-family detached	28,980	176,688	16%

Source: Montgomery County Planning Department Land Use Database, January 2011

MODERATELY PRICED DWELLING UNITS (MPDUs)

MPDUs	affordable housing	workforce housing	senior housing	total
0	0	0	0	0

Source: Montgomery County Planning Department Land Use Database

transportation costs

- Transportation costs are lowest in Twinbrook at an average annual cost of \$12,817 per household and highest in Aspen Hill at an average annual cost of \$14,798 per household.
- Aspen Hill households on average spend 15 percent more on transportation than Twinbrook and Gaithersburg households spend.

ANNUAL TRANSPORTATION AND HOUSING COSTS

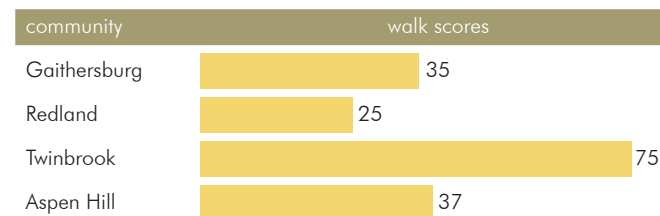
community	housing	transportation
Gaithersburg	\$21,780.00	\$12,899.00
Redland	\$23,760.00	\$14,320.00
Twinbrook	\$21,624.00	\$12,817.00
Aspen Hill	\$23,208.00	\$14,798.00

Source: Urban Land Institute, Terwilliger Center Housing + Transportation Calculator

walk score

- The high walk score for Twinbrook (75) reflects the location of residential uses near transit and the new Twinbrook Station project. Redland is considered car-dependent with a score of 25. Although Redland is relatively close to transit, there are few amenities within walking distance.
- The Great Seneca Science Corridor Plan* recommends creating Gaithersburg's Life Sciences Center with housing and amenities near the established single-use employment center.

WALK SCORES



Source: WalkScore.com

retail

- District 3 residents spent \$3.7 billion on consumer purchases in 2011—20 percent of consumer spending Countywide.
- Sales by area retailers totaled \$5.1 billion—34 percent of retail sales in the County.
- District 3 had a \$1.4 billion retail surplus in 2011.
- Only 4 major categories, including gas stations, general merchandise stores, clothing stores, and miscellaneous store retailers, showed retail leakage, with each capturing less than 75 percent of potential spending by District 3 residents.
- Several categories showed substantial retail surpluses, led by auto sales, which attracted \$683 million above what District 3 residents spent in that category.

2011 RETAIL SPENDING AND SALES

	billions
consumer spending	\$3.7
retail sales	\$5.1

Source: Montgomery County Planning Department analysis of Claritas Site Reports data

RETAIL ACTIVITY

retail activity 2011	consumer spending	retail spending	capture rate	unmet consumer demand	retail surplus
Total	\$3,652,198,488	\$5,057,890,474	138%	\$	\$1,405,691,986
Building Material, Garden Equip Stores	354,431,902	471,857,895	133%		117,425,993
Clothing and Clothing Accessories Stores	192,399,770	127,184,282	66%	65,215,488	
Electronics and Appliance Stores	87,757,612	230,740,864	263%		142,983,252
Food and Beverage Stores	433,669,771	831,207,385	192%		397,537,614
Foodservice and Drinking Places	395,180,916	484,878,895	123%		89,697,979
Furniture and Home Furnishings Stores	87,604,147	131,938,731	151%		44,334,584
Gasoline Stations	303,938,060	134,110,521	44%	169,827,539	
General Merchandise Stores	485,283,597	260,446,188	54%	224,837,409	
Health and Personal Care Stores	220,650,143	304,959,066	138%		84,308,923
Miscellaneous Store Retailers	92,497,021	68,611,564	74%	23,885,457	
Motor Vehicle and Parts Dealers	629,447,323	1,312,938,562	209%		683,491,239
Non-Store Retailers	290,323,741	566,229,065	195%		275,905,324
Sporting Goods, Hobby, Book, Music Stores	79,014,485	132,787,457	168%		53,772,972

Source: Montgomery County Planning Department analysis of Claritas SiteReports data

DETAILED RETAIL ACTIVITY

retail activity 2011	consumer spending	retail sales	capture rate	unmet consumer demand	retail surplus
Automotive Dealers	\$556,881,890	\$1,274,894,705	229%	\$	\$718,012,815
Automotive Parts/Accsrs, Tire Stores	47,728,166	32,418,143	68%	15,310,023	
Beer, Wine and Liquor Stores	28,953,718	43,228,028	149%		14,274,310
Book Stores and News Dealers	16,097,284	14,940,539	93%	1,156,745	
Camera and Photographic Equipment Stores	4,136,740	9,777,638	236%		5,640,898
Childrens, Infants Clothing Stores	7,095,356	9,639,192	136%		2,543,836
Clothing Accessories Stores	3,382,729	1,351,651	40%	2,031,078	
Computer and Software Stores	18,957,273	59,694,920	315%		40,737,647
Convenience Stores	18,162,753	19,404,075	107%		1,241,322
Cosmetics, Beauty Supplies, Perfume Stores	8,045,029	8,363,067	104%		318,038
Department Stores Excl Leased Depts	249,068,000	97,552,045	39%	151,515,955	
Drinking Places Alcoholic Beverages	16,945,506	1,231,621	7%	15,713,885	
Family Clothing Stores	70,706,319	41,637,722	59%	29,068,597	
Florists	7,666,168	3,301,816	43%	4,364,352	
Full Service Restaurants	180,159,167	235,280,062	131%		55,120,895
Furniture Stores	50,074,225	75,494,100	151%		25,419,875
Gasoline Stations With Conv Stores	224,764,188	58,571,369	26%	166,192,819	
Gift, Novelty and Souvenir Stores	17,384,267	9,565,193	55%	7,819,074	
Hardware Stores	31,437,450	19,311,009	61%	12,126,441	
Hobby, Toys and Games Stores	16,643,009	32,390,168	195%		15,747,159
Home Centers	131,997,022	216,101,570	164%		84,104,548
Home Furnishing Stores	37,529,921	56,444,631	150%		18,914,710
Household Appliances Stores	14,685,063	38,136,424	260%		23,451,361
Jewelry Stores	33,760,486	29,389,491	87%	4,370,995	
Limited Service Eating Places	165,539,323	214,189,737	129%		48,650,414
Luggage and Leather Goods Stores	2,123,360	152,962	7%	1,970,398	
Men's Clothing Stores	8,546,071	7,335,816	86%	1,210,255	
Musical Instrument and Supplies Stores	5,976,993	11,753,381	197%		5,776,388
Nursery and Garden Centers	27,098,611	2,270,758	8%	24,827,853	
Office Supplies and Stationery Stores	23,635,510	24,367,049	103%		731,539
Optical Goods Stores	8,135,177	18,331,024	225%		10,195,847
Other Building Materials Dealers	152,668,138	217,314,929	142%		64,646,791
Other Clothing Stores	8,910,534	5,650,809	63%	3,259,725	
Other Gasoline Stations	79,173,872	75,539,153	95%	3,634,719	
Other General Merchandise Stores	236,215,597	162,894,143	69%	73,321,454	
Other Health and Personal Care Stores	14,096,772	25,305,738	180%		11,208,966
Other Miscellaneous Store Retailers	34,779,386	26,407,970	76%	8,371,416	
Other Motor Vehicle Dealers	24,837,267	5,625,714	23%	19,211,553	
Outdoor Power Equipment Stores	3,233,296	9,054,027	280%		5,820,731
Paint and Wallpaper Stores	7,997,385	7,805,601	98%	191,784	
Pharmacies and Drug Stores	190,373,166	252,959,237	133%		62,586,071
Prerecorded Tapes, CDs, Record Stores	8,319,635	7,085,458	85%	1,234,177	
Radio, Television, Electronics Stores	49,978,536	123,131,882	246%		73,153,346
Sew/Needlework/Piece Goods Stores	4,221,489	19,082,904	452%		14,861,415
Shoe Stores	23,956,510	7,210,315	30%	16,746,195	
Special Foodservices	32,536,920	34,177,475	105%		1,640,555
Specialty Food Stores	12,195,273	8,977,055	74%	3,218,218	
Sporting Goods Stores	27,756,075	47,535,006	171%		19,778,931
Supermarkets, Grocery (Ex Conv) Stores	374,358,027	759,598,227	203%		385,240,200
Used Merchandise Stores	9,031,690	4,969,535	55%	4,062,155	
Women's Clothing Stores	33,918,405	24,816,324	73%	9,102,081	

Source: Montgomery County Planning Department analysis of Claritas SiteReports data

office

- The 2011 annual average office vacancy rate in District 3 was 15.5 percent, 1.6 percentage points above the Countywide rate of 13.9 percent.
- Office vacancies were below the 2010 rate of 15.7 percent, but remain above the pre-recession level of 10.9 percent in 2007.
- District 3's annual average office rent was \$27.67 per square foot in 2011, \$0.57 below the Countywide rate of \$28.24 per square foot.
- Average office rents in 2011 were up slightly from \$27.42 in 2010 but are below the five-year peak of \$28.44 in 2008.
- 32.9 percent of assessed value in District 3 is from nonresidential properties. The remaining 67.1 percent is from residential.

ANNUAL AVERAGE OFFICE VACANCY RATE



Source: Montgomery County Planning Department analysis of CoStar data

ANNUAL AVERAGE OFFICE LEASE RATE

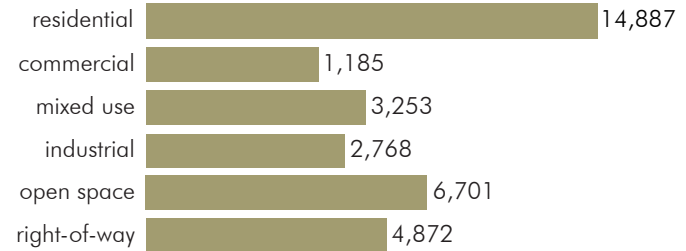


Source: Montgomery County Planning Department analysis of CoStar data

development activity

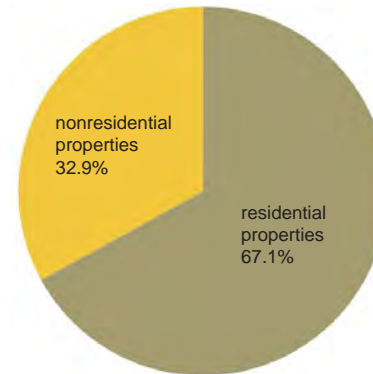
- The Residential Pipeline has 696 dwelling units in November 2011, 4 percent of the Countywide pipeline.
- The Nonresidential Pipeline has 4.6 million GFA in November 2011, 23 percent of the Countywide pipeline.

ACRES ZONED BY LAND USE CATEGORY



Source: Montgomery County Planning Department, 2010

ASSESSED VALUE BY PROPERTY TYPE



Source: Montgomery County Planning Department and Maryland State Department of Assessment and Taxation, 2010

APPROVED RESIDENTIAL UNITS AND COMMERCIAL SQUARE FOOTAGE REMAINING TO BE BUILT

district	units	square feet
3	696	4,658,745

Source: Montgomery County Planning Department, November 2011 Pipeline



GAITHERSBURG



TWINBROOK



ASPEN HILL



demographics

POPULATION AND HOUSEHOLDS

- In 2010, District 4 had 193,062 residents living in 64,623 households. Between 2010 and 2040, District 4 is forecasted to add 27,758 residents—a 16 percent increase. Twelve percent of the County’s population growth is forecasted to occur in District 4.
- The number of District 4 households is forecasted to grow by 17 percent, to reach 77,167 in 2040—accounting for 11 percent of household growth Countywide.
- Twenty-two percent of District 4 adults ages 25 and older have earned a graduate degree, compared to 30 percent Countywide.
- Forty-two percent of District 4 residents ages five and up speak a language other than English at home, compared to 39 percent Countywide.
- At \$92,960, District 4’s 2004 median household income is four percent below the County median of \$89,155.

POPULATION AND HOUSEHOLDS, 2010

household population	193,062
households	64,623

Source: U.S Census Bureau, 2010 U.S. Census

HOUSEHOLD POPULATION FORECAST, 2010-2040

year	district 4	county	share of county
2010	177,563	959,667	19%
2015	183,077	1,001,386	18%
2020	191,013	1,051,149	18%
2025	196,653	1,093,267	18%
2030	201,908	1,136,423	18%
2035	203,542	1,167,742	17%
2040	205,321	1,185,623	17%
forecasted growth, 2010 to 2040	27,758	225,956	12%
percent growth %	16	24	-

Source: U.S Census Bureau, 2010 U.S. Census; Montgomery County Planning Department Round 8 Cooperative Forecast

HOUSEHOLD FORECAST, 2010-2040

year	district 4	county	share of county
2010	66,184	361,030	18%
2015	67,878	376,536	18%
2020	70,885	397,237	18%
2025	73,224	415,795	18%
2030	75,428	436,202	17%
2035	76,363	451,446	17%
2040	77,167	461,469	17%
forecasted growth, 2010 to 2040	10,982	100,439	11%
percent growth %	17	30	-

Source: U.S. Census Bureau, 2010 U.S. Census; Montgomery County Planning Department Round 8 Cooperative Forecast

POPULATION AND HOUSEHOLD GROWTH, 2010-2040



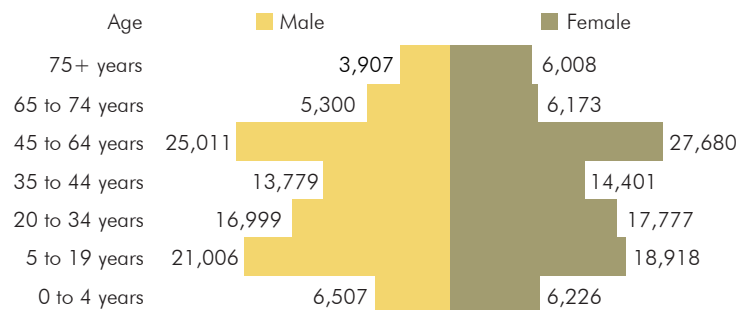
Source: Montgomery County Planning Department Round 8.1 Cooperative Forecast

POPULATION AND HOUSEHOLD COUNT, 2010

	district 4	county
household population	193,062	962,877
households	64,623	357,086

Source: U.S. Census Bureau, 2010 U.S. Census

AGE AND GENDER



Source: U.S. Census Bureau, 2006-2010 American Community Survey

AGE DISTRIBUTION

age	district 4	county
0 to 4 years	7%	7%
5 to 19 years	21%	19%
20 to 34 years	18%	19%
35 to 44 years	15%	14%
45 to 64 years	28%	28%
65 to 74 years	6%	6%
75+ years	5%	6%

Source: U.S. Census Bureau, 2006-2010 American Community Survey, 2010 American Community Survey

RACE AND ETHNICITY

race	district 4	county
non-Hispanic White	44%	49%
Black/African American	19%	17%
Hispanic	23%	17%
Asian or Pacific Islander	12%	14%
other	3%	3%

Source: U.S. Census Bureau, 2006-2010 American Community Survey, 2010 American Community Survey

EDUCATIONAL ATTAINMENT

education	district 4	county
less than high school	14%	9%
high school graduate	18%	14%
associate/trade school	21%	20%
bachelor degree	24%	26%
graduate degree	22%	30%

Source: U.S. Census Bureau, 2006-2010 American Community Survey, 2010 American Community Survey

FOREIGN LANGUAGE SPEAKERS

language	district 4	county
share of residents (ages 5+)	42%	39%
English-proficient	23%	24%
not English-proficient	19%	16%

Source: U.S. Census Bureau, 2006-2010 American Community Survey, 2010 American Community Survey

district 4

HOUSEHOLD INCOME

	district 4	county
Under \$50,000	28%	27%
\$50,000 to \$99,999	29%	28%
\$100,000 to \$149,999	20%	19%
\$150,000 to \$199,999	11%	11%
\$200,000+	12%	15%
median household income	\$92,960	\$89,155

Source: U.S Census Bureau, 2006-2010 American Community Survey, 2010 American Community Survey

HOUSING TENURE

	district 4	county
rate of homeownership	73%	66%

Source: U.S Census Bureau, 2006-2010 American Community Survey, 2010 American Community Survey

HOUSEHOLD TYPES

	district 4	county
family	75%	68%
living alone	20%	26%
other	5%	6%

Source: U.S Census Bureau, 2006-2010 American Community Survey, 2010 American Community Survey

PERSONS IN HOUSEHOLD

	district 4	county
one	20%	26%
two	31%	31%
three	18%	17%
four	17%	15%
five+	14%	11%

Source: U.S Census Bureau, 2006-2010 American Community Survey, 2010 American Community Survey

HOUSING COSTS

	district 4	county
median monthly housing costs - homeowner	\$2,431	\$2,498
median monthly housing costs - renter	\$1,333	\$1,466
cost burdened households* - homeowner	44%	37%
cost burdened households* - renter	57%	54%

* spending more than 30% of income on housing

Source: U.S Census Bureau, 2006-2010 American Community Survey, 2010 American Community Survey

employment

JOBS AND INDUSTRIES

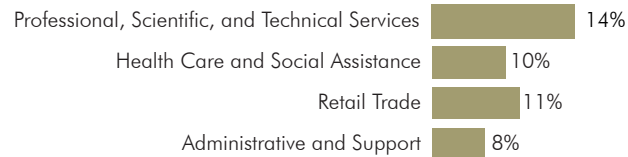
- 4,601 establishments in District 4 employ 51,198 workers. The District contains 10 percent of all County jobs.
- Fourteen percent of all job establishments in District 4 are in the professional, scientific, and technical services sector.
- Health care is 15 percent of the District's job base. Retail trade is 14 percent.
- The District's largest employers include Montgomery County Public Schools and the US Department of Health and Human Services.

EMPLOYMENT BASE

	jobs	share of jobs	county	share of county sector
Accommodation and Food Services	3,788	7%	33,653	11%
Administrative and Support	5,122	10%	32,447	16%
Agriculture, Forestry, Fishing, and Hunting	49	0%	550	9%
Arts, Entertainment, and Recreation	824	2%	7,042	12%
Construction	6,800	13%	24,843	27%
Educational Services	5,555	11%	37,375	15%
Finance and Insurance	891	2%	22,046	4%
Health Care and Social Assistance	7,654	15%	75,922	10%
Information	553	1%	15,580	4%
Management of Companies and Enterprises	161	0%	9,402	2%
Manufacturing	1,044	2%	13,321	8%
Mining, Quarrying, and Oil and Gas Extraction	0	0%	178	0%
Other Services (except Public Administration)	1,776	3%	24,288	7%
Professional, Scientific, and Technical Services	2,688	5%	74,166	4%
Public Administration	3,762	7%	60,536	6%
Real Estate and Rental and Leasing	1,210	2%	11,973	10%
Retail Trade	7,101	14%	49,002	14%
Transportation and Warehousing	1,039	2%	7,257	14%
Unclassified	0	0%	0	0%
Utilities	7	0%	629	1%
Wholesale Trade	1,175	2%	9,790	12%

Source: Montgomery County Planning Department analysis of BLS data, 2011

JOB ESTABLISHMENTS-INDUSTRY PERCENTAGE



Source: Montgomery County Planning Department analysis of BLS data, 2011

JOB ESTABLISHMENTS

other industry	2,639
Professional, Scientific, and Technical Services	645
Health Care and Social Assistance	444
Retail Trade	499
Administrative and Support	376
total industry	4,603

Source: Montgomery County Planning Department analysis of BLS data, 2011

TEN LARGEST EMPLOYERS

1,000 to 4,000 employees	
Montgomery County Public Schools	
US Department of Health and Human Services	
Montgomery General Hospital	
500 to 999 employees	
Giant Food Stores	
Montgomery County Government	
250 to 499 employees	
Brooke Grove Foundation	
RGIS	
Kaiser Permanente	
Rupert Landscape, Inc.	
Challenger Transportation, Inc.	

Source: Montgomery County Planning analysis of BLS data

RESIDENT WORKFORCE

- In 2010, there were 99,774 employed persons ages 16 and up living in District 4.
- District 4 accounts for 19 percent of the County's resident labor force.
- Most District 4 employed residents (61 percent) work in Montgomery County, compared to 59 percent Countywide
- Twenty-seven percent of District 4 employed residents work outside of Maryland compared to 30 percent Countywide.

RESIDENT WORKFORCE

	district 4	county	share of county
employed residents ages 16+	99,774	513,199	19%

Source: U.S Census Bureau, 2006-2010 American Community Survey, 2010 American Community Survey

WORK LOCATION OF RESIDENTS

commute	district 4	county
inside Montgomery County	61%	59%
elsewhere in Maryland	12%	11%
work outside of Maryland	27%	30%

Source: U.S Census Bureau, 2006-2010 American Community Survey, 2010 American Community Survey

COMMUTE MODE OF RESIDENTS

	district 4	county
drive alone	67%	65%
public transit/rail	15%	15%
carpool	11%	11%
work at home	5%	6%
walk/bike/other	2%	3%

Source: U.S Census Bureau, 2006-2010 American Community Survey, 2010 American Community Survey

AVERAGE COMMUTE TIME OF RESIDENTS

	district 4	county
all commutes (in minutes)	36	34

Source: U.S Census Bureau, 2006-2010 American Community Survey, 2010 American Community Survey

housing

MARKET

- The 2010 median sales price for a District 4 single-family detached house was \$330,000, 27 percent less than the County median. The 2010 median single-family attached house sales price was \$275,000, two percent more than the County median.
- Single-family detached housing prices fell 31 percent between 2007 and 2010, but fell four percent between 2009 and 2010.
- Single-family attached house prices were down 30 percent between 2009 and 2010, but fell seven percent between 2009 and 2010.
- House sales volume in District 4 was down 12 percent from 4,150 sales in 2009 compared to 3,669 sales in 2010, but up one percent from 3,629 sales in 2007.
- Seventy-three percent of the sales in 2010 were single-family detached homes, 19 percent were single-family attached, and nine percent were multifamily.
- District 4 accounted for 406 (21 percent) of all foreclosure auctions in the County in 2010. There were 70 foreclosure auctions in the first three quarters of 2011.

MEDIAN HOME SALES PRICE, 2010 DOLLARS

	2007	2008	2009	2010	change from 2007	change from 2009
single-family detached	478,511	400,051	342,258	330,000	-31%	-4%
single-family attached	394,377	337,005	294,757	275,000	-30%	-7%

Source: Montgomery County Planning Department Land Use Database, January 2011

HOUSING UNITS SOLD

	2007	2008	2009	2010	from 2007 to 2010	from 2009 to 2010
all housing units	3,629	3,343	4,150	3,669	1%	-12%
single-family detached	1,958	1,728	2,231	2,671	36%	20%
single-family attached	512	453	568	682	33%	20%
multifamily	1,159	1,162	1,351	316	-73%	-77%

Source: Montgomery County Planning Department Land Use Database, January 2011

HOUSING SALES BY UNIT TYPE

	sales
single-family detached	73%
single-family attached	19%
multifamily	9%

Source: Montgomery County Planning Department Land Use Database, January 2011

RESIDENTIAL FORECLOSURES

	district 4	county	share of county
total countywide foreclosures since 2010	476	2,310	20.8%
2010	406	1,951	20.8%
2011 through 3rd quarter	70	359	19.5%

Source: Department of Housing and Community Development, 2011

SUPPLY

- Sixty percent of housing units in District 4 were built before 1980, compared to 57 percent Countywide.
- Single-family detached houses account for 61 percent of the housing stock in the district, compared to 50 percent Countywide.
- 68 affordable housing units (34 MPDUs and 34 other affordable housing units) were approved in District 4 since the 2010, 39 percent of the Countywide approvals.

EXISTING HOUSING BY DECADE BUILT

decade	district 4	countywide
pre-1950	8.4%	12.8%
1950s	25.8%	17.0%
1960s	14.6%	14.2%
1970s	11.6%	13.3%
1980s	22.6%	23.7%
1990s	11.7%	10.8%
2000s	5.2%	8.1%
2010	0.2%	0.2%
pre-1980	60.3%	57.2%
after-1990	17.1%	19.1%

Source: Montgomery County Planning Department Land Use Database, January 2011

EXISTING HOUSING UNITS

type	district 4	countywide	share of county
all	64,550	356,763	18%
multifamily (condos and apartments)	14,835	114,549	13%
townhouse	10,295	65,526	16%
single-family detached	39,420	176,688	22%

Source: Montgomery County Planning Department Land Use Database, January 2011

MODERATELY PRICED DWELLING UNITS (MPDUs)

MPDUs	affordable housing	workforce housing	senior housing	total
34	0	34	0	68

Source: Montgomery County Planning Department Land Use Database

transportation costs

- Wheaton has the lowest transportation costs in District 4 at an average annual cost of \$12,122 per household. Ashton has the highest average annual transportation costs in District 4 at \$16,836 per household.
- The average Ashton household spends 50 percent more on annual housing and transportation costs than Wheaton households.

ANNUAL TRANSPORTATION AND HOUSING COSTS

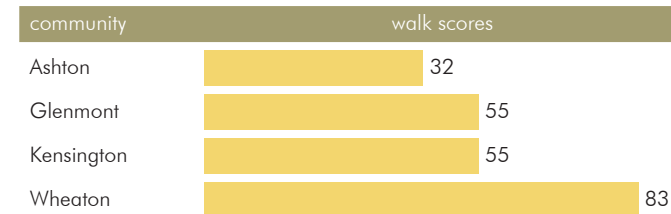
community	housing	transportation
Ashton	\$28,908	\$16,836
Glenmont	\$21,732	\$13,770
Kensington	\$23,280	\$13,468
Wheaton	\$18,636	\$12,122

Source: Urban Land Institute, Terwilliger Center Housing + Transportation Calculator

walk score

- Wheaton is characterized as “very walkable” with a walkscore of 83. Glenmont and Kensington each score 55 and are considered somewhat walkable, whereas Ashton is considered car-dependent with a score of 32.
- The current Glenmont Sector Plan Scope of Work identifies the need to “explore ways to improve pedestrian connections within the center and to surrounding communities.”

WALK SCORES



Source: WalkScore.com

retail

- District 4 residents spent \$3.4 billion on consumer purchases in 2011—18 percent of consumer spending Countywide.
- Sales by area retailers totaled \$1.7 billion—12 percent of the County's retail sales. There was a \$1.6 billion retail opportunity gap in 2011. Overall, District 4 retailers captured just 51 percent of retail spending by District residents.
- All major categories showed retail leakage. Motor vehicle and parts dealers had the largest retail opportunity gap, capturing just 21 percent of potential sales.
- Food/beverage stores captured the largest share (93 percent) of consumer spending in that category.

2011 RETAIL SPENDING AND SALES

	billions
consumer spending	\$3.4
retail sales	\$1.7

Source: Montgomery County Planning Department analysis of Claritas Site Reports data

RETAIL ACTIVITY

retail activity 2011	consumer spending	retail spending	capture rate	unmet consumer demand	retail surplus
Total	\$3,350,999,648	\$1,709,173,190	51%	\$1,641,826,458	
Building Material, Garden Equip Stores	323,169,409	178,735,763	55%	144,433,646	
Clothing and Clothing Accessories Stores	180,080,209	138,215,668	77%	41,864,541	
Electronics and Appliance Stores	79,099,784	32,590,221	41%	46,509,563	
Food and Beverage Stores	400,219,566	372,218,262	93%	28,001,304	
Foodservice and Drinking Places	350,339,398	221,189,948	63%	129,149,450	
Furniture and Home Furnishings Stores	78,358,144	63,622,389	81%	14,735,755	
Gasoline Stations	281,276,087	84,788,636	30%	196,487,451	
General Merchandise Stores	449,035,016	169,472,045	38%	279,562,971	
Health and Personal Care Stores	198,484,287	130,547,121	66%	67,937,166	
Miscellaneous Store Retailers	83,577,348	29,657,723	35%	53,919,625	
Motor Vehicle and Parts Dealers	593,185,828	123,139,938	21%	470,045,890	
Non-Store Retailers	262,876,554	124,713,262	47%	138,163,292	
Sporting Goods, Hobby, Book, Music Stores	71,298,019	40,282,213	56%	31,015,806	

Source: Montgomery County Planning Department analysis of Claritas SiteReports data

DETAILED RETAIL ACTIVITY

retail activity 2011	consumer spending	retail sales	capture rate	unmet consumer demand	retail surplus
Automotive Dealers	\$524,381,948	\$95,566,372	18%	\$428,815,576	\$ -
Automotive Parts/Accsrs, Tire Stores	42,003,383	21,603,647	51%	20,399,736	
Beer, Wine and Liquor Stores	25,631,214	24,154,024	94%	1,477,190	
Book Stores and News Dealers	13,831,160	2,120,756	15%	11,710,404	
Camera and Photographic Equipment Stores	3,770,819	0	0%	3,770,819	
Childrens, Infants Clothing Stores	6,776,049	1,975,989	29%	4,800,060	
Clothing Accessories Stores	3,177,750	1,454,176	46%	1,723,574	
Computer and Software Stores	17,039,949	4,256,710	25%	12,783,239	
Convenience Stores	16,707,939	12,912,707	77%	3,795,232	
Cosmetics, Beauty Supplies, Perfume Stores	7,207,466	5,041,099	70%	2,166,367	
Department Stores Excl Leased Depts	231,374,861	152,054,989	66%	79,319,872	
Drinking Places Alcoholic Beverages	15,000,121	674,750	4%	14,325,371	
Family Clothing Stores	66,928,198	54,931,661	82%	11,996,537	
Florists	6,970,843	3,381,648	49%	3,589,195	
Full Service Restaurants	159,325,887	103,071,078	65%	56,254,809	
Furniture Stores	44,652,996	28,656,809	64%	15,996,187	
Gasoline Stations With Conv Stores	207,976,914	33,321,070	16%	174,655,844	
Gift, Novelty and Souvenir Stores	15,604,838	6,135,959	39%	9,468,879	
Hardware Stores	28,766,391	4,671,781	16%	24,094,610	
Hobby, Toys and Games Stores	15,151,746	5,184,505	34%	9,967,241	
Home Centers	119,775,728	30,479,303	25%	89,296,425	
Home Furnishing Stores	33,705,148	34,965,580	104%		1,260,432
Household Appliances Stores	13,396,847	3,822,058	29%	9,574,789	
Jewelry Stores	29,365,111	18,505,170	63%	10,859,941	
Limited Service Eating Places	147,112,137	77,817,338	53%	69,294,799	
Luggage and Leather Goods Stores	1,926,102	0	0%	1,926,102	
Men's Clothing Stores	7,974,555	3,606,221	45%	4,368,334	
Musical Instrument and Supplies Stores	5,321,771	18,349,317	345%		13,027,546
Nursery and Garden Centers	24,948,977	25,264,285	101%		315,308
Office Supplies and Stationery Stores	20,858,370	7,119,425	34%	13,738,945	
Optical Goods Stores	7,729,989	8,088,853	105%		358,864
Other Building Materials Dealers	138,984,000	109,143,826	79%	29,840,174	
Other Clothing Stores	8,460,697	8,832,565	104%		371,868
Other Gasoline Stations	73,299,173	51,467,566	70%	21,831,607	
Other General Merchandise Stores	217,660,155	17,417,056	8%	200,243,099	
Other Health and Personal Care Stores	12,684,193	3,477,183	27%	9,207,010	
Other Miscellaneous Store Retailers	31,912,261	8,049,508	25%	23,862,753	
Other Motor Vehicle Dealers	26,800,496	5,969,919	22%	20,830,577	
Outdoor Power Equipment Stores	3,385,184	768,452	23%	2,616,732	
Paint and Wallpaper Stores	7,309,128	8,408,116	115%		1,098,988
Pharmacies and Drug Stores	170,862,639	113,939,986	67%	56,922,653	
Prerecorded Tapes, CDs, Record Stores	7,410,855	5,131,227	69%	2,279,628	
Radio, Television, Electronics Stores	44,892,168	24,511,453	55%	20,380,715	
Sew/Needlework/Piece Goods Stores	3,848,090	2,886,819	75%	961,271	
Shoe Stores	23,055,669	21,522,546	93%	1,533,123	
Special Foodservices	28,901,253	39,626,782	137%		10,725,529
Specialty Food Stores	11,357,192	7,191,972	63%	4,165,220	
Sporting Goods Stores	25,734,397	6,609,588	26%	19,124,809	
Supermarkets, Grocery (Ex Conv) Stores	346,523,222	327,959,559	95%	18,563,663	
Used Merchandise Stores	8,231,036	4,971,183	60%	3,259,853	
Women's Clothing Stores	32,416,078	27,387,340	84%	5,028,738	

Source: Montgomery County Planning Department analysis of Claritas SiteReports data

office

- The 2011 annual average office vacancy rate in District 4 was 7.4 percent, roughly half the Countywide rate of 13.9 percent.
- Office vacancies were just above the 2010 rate of 6.5 percent, but remain above the pre-recession level of 4.8 percent in 2007.
- District 4's annual average office rent was \$21.21 per square foot in 2011, \$1.87 below the Countywide rate of \$28.24 per square foot.
- Average office rents in 2011 were down slightly from \$21.88 in 2010 but are below the five-year peak of \$23.42 in 2008.
- 18.6 percent of assessed value in District 4 is from nonresidential properties. The remaining 81.4 percent of assessed value is from residential.

ANNUAL AVERAGE OFFICE VACANCY RATE



Source: Montgomery County Planning Department analysis of CoStar data

ANNUAL AVERAGE OFFICE LEASE RATE



Source: Montgomery County Planning Department analysis of CoStar data

development activity

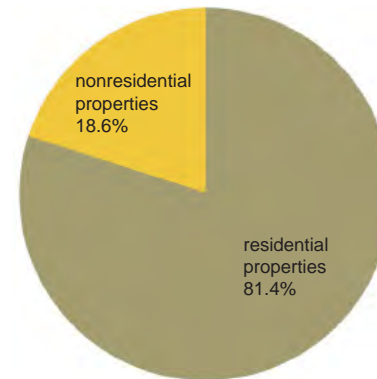
- The Residential Pipeline has 2,166 dwelling units in November 2011, 12 percent of the Countywide pipeline.
- The Nonresidential Pipeline has 1.4 million GFA in November 2011, 7 percent of the Countywide pipeline.

ACRES ZONED BY LAND USE CATEGORY



Source: Montgomery County Planning Department, 2010

ASSESSED VALUE BY PROPERTY TYPE



Source: Montgomery County Planning Department and Maryland State Department of Assessment and Taxation, 2010

APPROVED RESIDENTIAL UNITS AND COMMERCIAL SQUARE FOOTAGE REMAINING TO BE BUILT

district	units	square feet
4	2,166	1,393,606

Source: Montgomery County Planning Department, November 2011 Pipeline



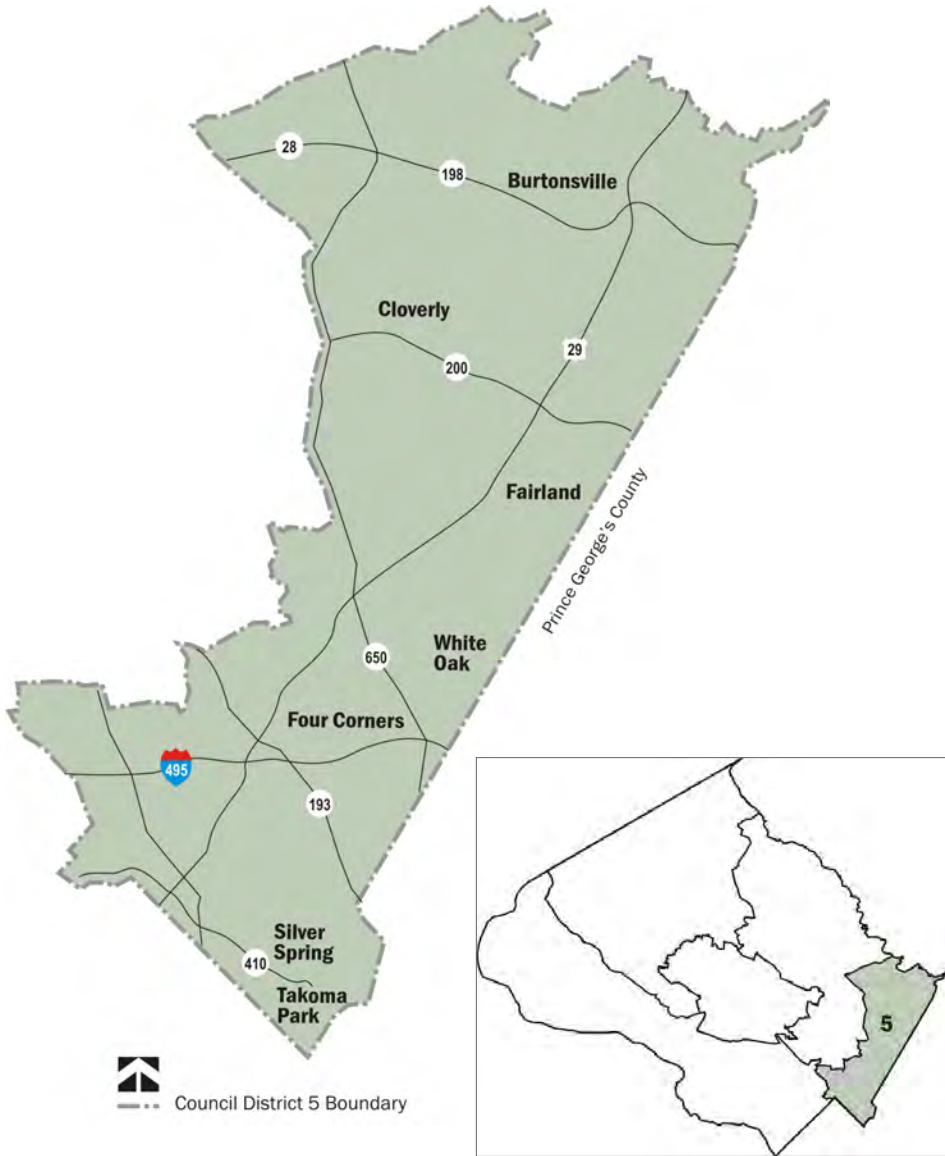
KENSINGTON



GLENMONT



WHEATON



demographics

POPULATION AND HOUSEHOLDS

- In 2010, District 5 had 192,810 residents living in 73,116 households.
- Between 2010 and 2040, District 5 is forecasted to add 18,284 residents—a 10 percent increase. Eight percent of the County’s population growth is forecasted to occur in District 5.
- The number of households in District 5 is forecasted to increase by 14 percent to 83,215 in 2040—accounting for 10 percent of household growth Countywide.
- Twenty-five percent of District 5 adults ages 25 and older have earned a graduate degree, compared to 30 percent Countywide.
- Forty percent of District 5 residents ages five and up speak a language other than English at home, compared to 39 percent Countywide.
- At \$81,478, District 5’s median household income is nine percent below the County median of \$89,155.

POPULATION AND HOUSEHOLDS, 2010

household population	192,810
households	73,116

Source: U.S Census Bureau, 2010 U.S. Census

HOUSEHOLD POPULATION FORECAST, 2010-2040

year	district 5	county	share of county
2010	190,800	959,667	20%
2015	199,122	1,001,386	20%
2020	202,624	1,051,149	19%
2025	204,411	1,093,267	19%
2030	206,098	1,136,423	18%
2035	208,005	1,167,742	18%
2040	209,084	1,185,623	18%
forecasted growth, 2010 to 2040	18,284	225,956	8%
percent growth %	10	24	-

Source: U.S Census Bureau, 2010 U.S. Census; Montgomery County Planning Department Round 8 Cooperative Forecast

HOUSEHOLD FORECAST, 2010-2040

year	district 5	county	share of county
2010	73,219	361,030	20%
2015	76,517	376,536	20%
2020	78,433	397,237	20%
2025	79,686	415,795	19%
2030	81,043	436,202	19%
2035	82,466	451,446	18%
2040	83,215	461,469	18%
forecasted growth, 2010 to 2040	9,996	100,439	10%
percent growth %	14	30	-

Source: Montgomery County Planning Department
Round 8.1 Cooperative Forecast

POPULATION AND HOUSEHOLD GROWTH, 2010-2040



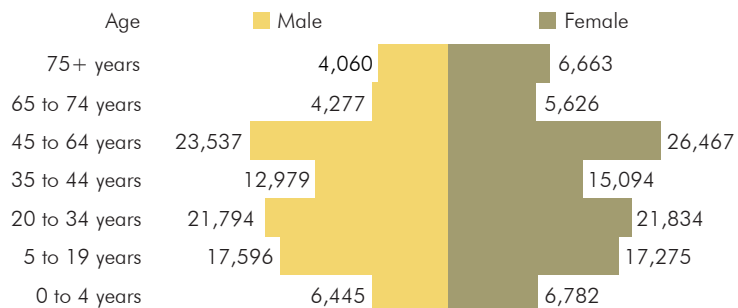
Source: U.S. Census Bureau, 2010 U.S. Census; Montgomery County Planning Department
Round 8 Cooperative Forecast

POPULATION AND HOUSEHOLD COUNT, 2010

	district 5	county
household population	192,810	962,877
households	73,116	357,086

Source: U.S. Census Bureau, 2010 U.S. Census

AGE AND GENDER



Source: U.S. Census Bureau, 2006-2010 American Community Survey

AGE DISTRIBUTION

age	district 5	county
0 to 4 years	7%	7%
5 to 19 years	18%	19%
20 to 34 years	23%	19%
35 to 44 years	15%	14%
45 to 64 years	26%	28%
65 to 74 years	5%	6%
75+ years	6%	6%

Source: U.S. Census Bureau, 2006-2010 American Community Survey,
2010 American Community Survey

RACE AND ETHNICITY

race	district 5	county
non-Hispanic White	36%	49%
Black/African American	32%	17%
Hispanic	19%	17%
Asian or Pacific Islander	11%	14%
other	3%	3%

Source: U.S. Census Bureau, 2006-2010 American Community Survey,
2010 American Community Survey

EDUCATIONAL ATTAINMENT

education	district 5	county
less than high school	12%	9%
high school graduate	17%	14%
associate/trade school	21%	20%
bachelor degree	25%	26%
graduate degree	25%	30%

Source: U.S. Census Bureau, 2006-2010 American Community Survey,
2010 American Community Survey

FOREIGN LANGUAGE SPEAKERS

language	district 5	county
share of residents (ages 5+)	40%	39%
English-proficient	23%	24%
not English-proficient	17%	16%

Source: U.S. Census Bureau, 2006-2010 American Community Survey,
2010 American Community Survey

district 5

HOUSEHOLD INCOME

	district 5	county
Under \$50,000	32%	27%
\$50,000 to \$99,999	33%	28%
\$100,000 to \$149,999	18%	19%
\$150,000 to \$199,999	10%	11%
\$200,000+	8%	15%
median household income	\$81,478	\$89,155

Source: U.S Census Bureau, 2006-2010 American Community Survey, 2010 American Community Survey

HOUSING TENURE

	district 5	county
rate of homeownership	56%	66%

Source: U.S Census Bureau, 2006-2010 American Community Survey, 2010 American Community Survey

HOUSEHOLD TYPES

	district 5	county
family	64%	68%
living alone	28%	26%
other	8%	6%

Source: U.S Census Bureau, 2006-2010 American Community Survey, 2010 American Community Survey

PERSONS IN HOUSEHOLD

	district 5	county
one	28%	26%
two	31%	31%
three	16%	17%
four	14%	15%
five+	11%	11%

Source: U.S Census Bureau, 2006-2010 American Community Survey, 2010 American Community Survey

HOUSING COSTS

	district 5	county
median monthly housing costs - homeowner	\$2,417	\$2,498
median monthly housing costs - renter	\$1,293	\$1,466
cost burdened households* - homeowner	40%	37%
cost burdened households* - renter	54%	54%

* spending more than 30% of income on housing

Source: U.S Census Bureau, 2006-2010 American Community Survey, 2010 American Community Survey

employment

JOBS AND INDUSTRIES

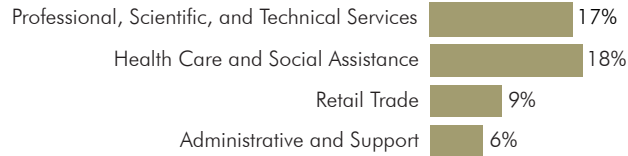
- 5,192 job establishments in District 5 employ 84,717 workers. The District contains 17 percent of all County jobs.
- 17 percent of District 5 job establishments are in the professional, scientific, and technical services sector.
- Health care is 20 percent of the District's jobs base. Retail trade is 8 percent.
- The District's largest employers include the Food and Drug Administration, the National Oceanic and Atmospheric Administration (NOAA), Montgomery County Public Schools, Holy Cross Hospital, and the US Department of Defense.

EMPLOYMENT BASE

	jobs	share of jobs	county	share of county sector
Accommodation and Food Services	4,713	6%	33,653	14%
Administrative and Support	5,234	6%	32,447	16%
Agriculture, Forestry, Fishing, and Hunting	421	0%	550	77%
Arts, Entertainment, and Recreation	509	1%	7,042	7%
Construction	3,407	4%	24,843	14%
Educational Services	5,727	7%	37,375	15%
Finance and Insurance	1,759	2%	22,046	8%
Health Care and Social Assistance	17,161	20%	75,922	23%
Information	7,471	9%	15,580	48%
Management of Companies and Enterprises	739	1%	9,402	8%
Manufacturing	612	1%	13,321	5%
Mining, Quarrying, and Oil and Gas Extraction	72	0%	178	41%
Other Services (except Public Administration)	3,643	4%	24,288	15%
Professional, Scientific, and Technical Services	13,634	16%	74,166	18%
Public Administration	9,518	11%	60,536	16%
Real Estate and Rental and Leasing	1,633	2%	11,973	14%
Retail Trade	7,120	8%	49,002	15%
Transportation and Warehousing	690	1%	7,257	10%
Unclassified	0	0%	0	0%
Utilities	0	0%	629	0%
Wholesale Trade	651	1%	9,790	7%

Source: Montgomery County Planning Department analysis of BLS data, 2011

JOB ESTABLISHMENTS-INDUSTRY PERCENTAGE



Source: Montgomery County Planning Department analysis of BLS data, 2011

JOB ESTABLISHMENTS

other industry	2,629
Professional, Scientific, and Technical Services	887
Health Care and Social Assistance	937
Retail Trade	445
Administrative and Support	296
total industry	5,194

Source: Montgomery County Planning Department analysis of BLS data, 2011

TEN LARGEST EMPLOYERS

5,000+ employees
Food and Drug Administration
3,000 to 4,999 employees
National Oceanic and Atmospheric Administration
Montgomery County Public Schools
1,000 to 2,999 employees
Holy Cross Hospital
US Department of Defense
Adventist Healthcare
Verizon
Discovery
Riderwood Village
Montgomery County Government

Source: Montgomery County Planning analysis of BLS data

RESIDENT WORKFORCE

- In 2010, there were 103,326 employed persons ages 16 and up living in District 5.
- District 5 accounts for 20 percent of the County's resident labor force.
- Fewer than half of District 5 employed residents (46 percent) work in Montgomery County, compared to 59 percent of Countywide
- Thirty-seven percent of employed residents in District 5 work outside of MD compared to 30 percent Countywide.

RESIDENT WORKFORCE

	district 5	county	share of county
employed residents ages 16+	103,326	513,199	20%

Source: U.S Census Bureau, 2006-2010 American Community Survey, 2010 American Community Survey

WORK LOCATION OF RESIDENTS

commute	district 5	county
inside Montgomery County	46%	59%
elsewhere in Maryland	18%	11%
work outside of Maryland	37%	30%

Source: U.S Census Bureau, 2006-2010 American Community Survey, 2010 American Community Survey

COMMUTE MODE OF RESIDENTS

	district 5	county
drive alone	59%	65%
public transit/rail	21%	15%
carpool	11%	11%
work at home	5%	6%
walk/bike/other	4%	3%

Source: U.S Census Bureau, 2006-2010 American Community Survey, 2010 American Community Survey

AVERAGE COMMUTE TIME OF RESIDENTS

	district 5	county
all commutes (in minutes)	33	34

Source: U.S Census Bureau, 2006-2010 American Community Survey, 2010 American Community Survey

housing

MARKET

- The 2010 median sales price for a District 5 single-family detached house was \$369,000, 19 percent less than the County median. The 2010 median sales price for a single-family attached house was \$275,000, two percent above the County median.
- Single-family detached house prices fell 26 percent between 2007 and 2010 but fell two percent between 2009 and 2010.
- Single-family attached house prices fell 26 percent between 2007 and 2010 but increased two percent between 2009 and 2010.
- House sales volume was down 14 percent from 5,507 sales in 2009 compared to 4,726 sales in 2010, but up one percent from 3,854 sales in 2007.
- Forty-five percent of the sales in 2010 were single-family detached houses, 12 percent were single-family attached houses, and 43 percent were multifamily houses.
- District 5 accounted for 375 (19 percent) of all foreclosure auctions in 2010. There were 76 foreclosure auctions in the first three quarters of 2011.

MEDIAN HOME SALES PRICE, 2010 DOLLARS

	2007	2008	2009	2010	change from 2007	change from 2009
single-family detached	499,544	420,306	376,069	369,000	-26%	-2%
single-family attached	389,119	322,066	274,429	275,000	-29%	0%

Source: Montgomery County Planning Department Land Use Database, January 2011

HOUSING UNITS SOLD

	2007	2008	2009	2010	from 2007 to 2010	from 2009 to 2010
all housing units	3,854	3,595	5,507	4,726	23%	-14%
single-family detached	1,860	1,596	1,950	2,125	14%	9%
single-family attached	500	452	493	557	11%	13%
multifamily	1,494	1,547	3,064	2,044	37%	-33%

Source: Montgomery County Planning Department Land Use Database, January 2011

HOUSING SALES BY UNIT TYPE

	sales
single-family detached	45%
single-family attached	12%
multifamily	43%

Source: Montgomery County Planning Department Land Use Database, January 2011

RESIDENTIAL FORECLOSURES

	district 5	county	share of county
total countywide foreclosures since 2010	451	2,310	19.5%
2010	375	1,951	19.2%
2011 through 3rd quarter	76	359	21.2%

Source: Department of Housing and Community Development, 2011

SUPPLY

- Seventy percent of housing units in District 5 were built before 1980, compared to 57 percent Countywide.
- Single-family detached homes account for 46 percent of the housing stock in the district, compared to 50 percent Countywide.
- No affordable housing units have been approved since 2010.

EXISTING HOUSING BY DECADE BUILT

decade	district 5	countywide
pre-1950	29.2%	12.8%
1950s	21.6%	17.0%
1960s	14.5%	14.2%
1970s	4.1%	13.3%
1980s	22.3%	23.7%
1990s	3.6%	10.8%
2000s	4.5%	8.1%
2010	0.1%	0.2%
pre-1980	69.5%	57.2%
after-1990	8.2%	19.1%

Source: Montgomery County Planning Department Land Use Database, January 2011

EXISTING HOUSING UNITS

type	district 5	countywide	share of county
all	72,986	356,763	20%
multifamily (condos and apartments)	31,171	114,549	27%
townhouse	8,215	65,526	13%
detached single-family	33,600	176,688	19%

Source: Montgomery County Planning Department Land Use Database, January 2011

MODERATELY PRICED DWELLING UNITS (MPDUs)

MPDUs	affordable housing	workforce housing	senior housing	total
0	0	0	0	0

Source: Montgomery County Planning Department Land Use Database

transportation costs

- Transportation costs are lowest in Silver Spring at an average annual cost of \$9,490 per household. Silver Spring has the lowest average transportation and housing costs in the County.
- District 5 transportation costs are highest in Fairland at an average annual cost of \$15,405 per household. Fairland households spend an average of 62 percent more on transportation than Silver Spring households.

ANNUAL TRANSPORTATION AND HOUSING COSTS

community	housing	transportation
Fairland	\$28,908	\$15,405
Hillandale	\$25,272	\$14,668
Silver Spring	\$18,444	\$9,490
Takoma Park	\$28,404	\$13,639

Source: Urban Land Institute, Terwilliger Center Housing + Transportation Calculator

walk score

- Silver Spring and Takoma Park have two of the highest walk scores in the County due to their proximity to transit but also their wide variety of amenities and services.
- Hillandale has the lowest walk score in District 5, reflecting a higher car dependency.

WALK SCORES

community	walk scores
Fairland	46
Hillandale	31
Silver Spring	82
Takoma Park	85

Source: WalkScore.com

retail

- District 5 residents spent an estimated \$3.3 billion on consumer purchases in 2011—18 percent of consumer spending Countywide.
- Sales by area retailers totaled nearly \$2.5 billion—17 percent of retail sales in the County.
- There was an \$812 million retail opportunity gap in 2011. Overall, the District’s retailers captured 75 percent of the value of retail purchases by District residents.
- The greatest retail leakage was in general merchandise stores, which captured just 19 percent of potential sales.
- Motor vehicle and parts dealers had a \$139 retail surplus, with a 125 percent retail capture rate. Food and beverage stores also showed a \$91 million net retail surplus in District 5 in 2011.

2011 RETAIL SPENDING AND SALES

	billions
consumer spending	\$3.3
retail sales	\$2.5

Source: Montgomery County Planning Department analysis of Claritas Site Reports data

RETAIL ACTIVITY

retail activity 2011	consumer spending	retail spending	capture rate	unmet consumer demand	retail surplus
Total	\$3,294,089,988	\$2,482,330,702	75%	\$811,759,286	\$
Building Material, Garden Equip Stores	303,695,270	246,886,468	81%	56,808,802	
Clothing and Clothing Accessories Stores	178,835,143	94,938,052	53%	83,897,091	
Electronics and Appliance Stores	79,018,890	63,572,370	80%	15,446,520	
Food and Beverage Stores	401,671,378	492,709,442	123%		91,038,064
Foodservice and Drinking Places	357,340,848	245,157,789	69%	112,183,059	
Furniture and Home Furnishings Stores	74,861,398	21,026,911	28%	53,834,487	
Gasoline Stations	287,900,240	151,741,413	53%	136,158,827	
General Merchandise Stores	447,340,243	85,426,369	19%	361,913,874	
Health and Personal Care Stores	199,547,986	119,691,980	60%	79,856,006	
Miscellaneous Store Retailers	81,940,406	38,080,538	46%	43,859,868	
Motor Vehicle and Parts Dealers	549,816,760	688,969,755	125%		139,152,995
Non-Store Retailers	261,954,715	200,143,499	76%	61,811,216	
Sporting Goods, Hobby, Book, Music Stores	70,166,713	33,986,118	48%	36,180,595	

Source: Montgomery County Planning Department analysis of Claritas SiteReports data

DETAILED RETAIL ACTIVITY

retail activity 2011	consumer spending	retail sales	capture rate	unmet consumer demand	retail surplus
Automotive Dealers	\$491,202,635	\$666,151,670	136%	\$	\$174,949,035
Automotive Parts/Accsrs, Tire Stores	40,542,693	21,756,629	54%	18,786,064	
Beer, Wine and Liquor Stores	26,150,851	23,496,176	90%	2,654,675	
Book Stores and News Dealers	14,095,141	9,621,320	68%	4,473,821	
Camera and Photographic Equipment Stores	3,786,125	14,827,137	392%		11,041,012
Childrens, Infants Clothing Stores	6,717,104	2,056,855	31%	4,660,249	
Clothing Accessories Stores	3,159,414	1,201,469	38%	1,957,945	
Computer and Software Stores	17,324,134	18,358,672	106%		1,034,538
Convenience Stores	16,784,930	36,253,839	216%		19,468,909
Cosmetics, Beauty Supplies, Perfume Stores	7,256,875	1,735,808	24%	5,521,067	
Department Stores Excl Leased Depts	230,109,828	71,955,979	31%	158,153,849	
Drinking Places Alcoholic Beverages	15,330,908	562,294	4%	14,768,614	
Family Clothing Stores	66,608,779	24,111,701	36%	42,497,078	
Florists	6,553,276	4,202,362	64%	2,350,914	
Full Service Restaurants	162,777,639	110,446,435	68%	52,331,204	
Furniture Stores	42,353,790	5,832,968	14%	36,520,822	
Gasoline Stations With Conv Stores	212,557,096	107,854,903	51%	104,702,193	
Gift, Novelty and Souvenir Stores	15,331,545	3,126,724	20%	12,204,821	
Hardware Stores	27,628,983	41,338,130	150%		13,709,147
Hobby, Toys and Games Stores	15,207,328	2,595,158	17%	12,612,170	
Home Centers	114,072,892	70,948,776	62%	43,124,116	
Home Furnishing Stores	32,507,609	15,193,942	47%	17,313,667	
Household Appliances Stores	12,923,137	3,590,587	28%	9,332,550	
Jewelry Stores	28,159,441	16,307,097	58%	11,852,344	
Limited Service Eating Places	149,860,513	124,699,249	83%	25,161,264	
Luggage and Leather Goods Stores	1,892,583	305,924	16%	1,586,659	
Men's Clothing Stores	7,855,105	3,902,351	50%	3,952,754	
Musical Instrument and Supplies Stores	5,137,638	4,433,227	86%	704,411	
Nursery and Garden Centers	24,006,042	7,931,587	33%	16,074,455	
Office Supplies and Stationery Stores	20,467,312	14,922,665	73%	5,544,647	
Optical Goods Stores	7,590,379	11,295,121	149%		3,704,742
Other Building Materials Dealers	128,903,799	113,057,384	88%	15,846,415	
Other Clothing Stores	8,465,532	4,147,199	49%	4,318,333	
Other Gasoline Stations	75,343,144	43,886,509	58%	31,456,635	
Other General Merchandise Stores	217,230,415	13,470,390	6%	203,760,025	
Other Health and Personal Care Stores	12,766,774	9,430,204	74%	3,336,570	
Other Miscellaneous Store Retailers	31,443,711	13,426,583	43%	18,017,128	
Other Motor Vehicle Dealers	18,071,432	1,061,456	6%	17,009,976	
Outdoor Power Equipment Stores	2,398,846	335,335	14%	2,063,511	
Paint and Wallpaper Stores	6,684,709	13,275,256	199%		6,590,547
Pharmacies and Drug Stores	171,933,958	97,230,847	57%	74,703,111	
Prerecorded Tapes, CDs, Record Stores	7,274,524	5,383,989	74%	1,890,535	
Radio, Television, Electronics Stores	44,985,493	26,795,974	60%	18,189,519	
Sew/Needlework/Piece Goods Stores	3,730,563	6,515,554	175%		2,784,991
Shoe Stores	23,460,542	16,704,064	71%	6,756,478	
Special Foodservices	29,371,788	9,449,811	32%	19,921,977	
Specialty Food Stores	11,369,042	8,460,682	74%	2,908,360	
Sporting Goods Stores	24,721,518	5,436,870	22%	19,284,648	
Supermarkets, Grocery (Ex Conv) Stores	347,366,555	424,498,745	122%		77,132,190
Used Merchandise Stores	8,144,561	2,402,204	29%	5,742,357	
Women's Clothing Stores	32,516,642	26,201,391	81%	6,315,251	

Source: Montgomery County Planning Department analysis of Claritas SiteReports data

office

- The 2011 annual average office vacancy rate in District 5 was 10.7 percent, 3.2 percentage points below the Countywide rate of 13.9 percent.
- Office vacancies fell more than half a percentage point from the 2010 rate of 9.9 percent, but remain nearly double the pre-recession level of 5.2 percent in 2007.
- District 5's annual average office rent was \$26.96 per square foot in 2011, \$1.28 below the Countywide rate of \$28.24 per square foot.
- Average office rents in 2011 were down slightly from \$27.05 in 2010 but are below the five-year peak of \$28.16 in 2008.
- 22.3 percent of assessed value in District 5 is from nonresidential properties. The remaining 77.7 percent is from residential.

ANNUAL AVERAGE OFFICE VACANCY RATE



Source: Montgomery County Planning Department analysis of CoStar data

ANNUAL AVERAGE OFFICE LEASE RATE

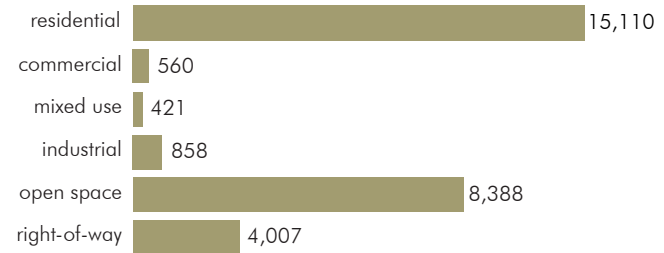


Source: Montgomery County Planning Department analysis of CoStar data

development activity

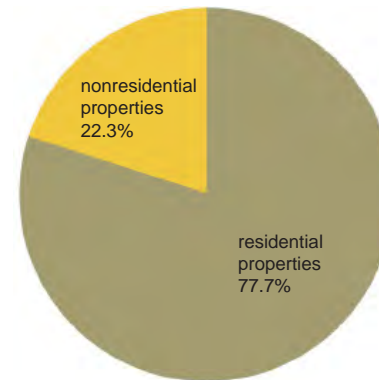
- The Residential Pipeline has 3,460 dwelling units in November 2011, 21 percent of the Countywide pipeline.
- The Nonresidential Pipeline has 2.0 million GFA in November 2011, 10 percent of the Countywide pipeline.

ACRES ZONED BY LAND USE CATEGORY



Source: Montgomery County Planning Department, 2010

ASSESSED VALUE BY PROPERTY TYPE



Source: Montgomery County Planning Department and Maryland State Department of Assessment and Taxation, 2010

APPROVED RESIDENTIAL UNITS AND COMMERCIAL SQUARE FOOTAGE REMAINING TO BE BUILT

district	units	square feet
5	3,460	2,070,105

Source: Montgomery County Planning Department, November 2011 Pipeline



MONTGOMERY COUNTY SNAPSHOTS

COUNCIL DISTRICTS BY THE NUMBERS

Montgomery County Planning Department



MontgomeryPlanning.org



312000006