

eral Plan envisioned significant growth in manufacturing. However, between 1970 and 1990 manufacturing declined from 5 percent to 4.4 percent as a share of total at-place employment. The service sector unexpectedly represented more than one-third of total at-place employment in the County, up from 21 percent in 1970. The retail sector followed with over 16 percent of at-place employment.

* **The character and intensity of use at employment centers have changed.** Prior to 1970, headquarters of large County employers such as Vitro Corporation, National Geographic, and GEICO were typically located in low-rise buildings in large park-like settings. After 1970, additional gross floor area was added to many existing employment centers and new ones were developed. This additional density more closely follows the wedges and corridors concept as envisioned in the General Plan. Office buildings have become more site intensive, thereby requiring less land per employee. Two federal agencies, the National Oceanographic and Atmospheric Administration and the Nuclear Regulatory Commission, have built tall office buildings within walking distance of major transit stations. The multi-story buildings at Rock Spring Park are another example of more intense office development in the urban/suburban ring.

* **An estimated 17.5 million square feet of retail space is located in 217 shopping centers across Montgomery County, an increase of almost 6 million square feet since 1970.** Based on data gathered from the 1990 Kalis's Shopping Center Leasing Directory, five urban/suburban ring and I-270 corridor locations - Silver Spring, Bethesda, Rockville, Germantown and Gaithersburg - account for more than 80 percent of the growth in retail space. The Gaithersburg area alone accounts for almost half of all new shopping center space since 1970.

* **The size of shopping centers and their anchor stores has changed during the last 20 to 25 years.** Between 1970 and 1990, the size of a proto-

typical grocery store almost tripled from under 20,000 square feet to nearly 60,000 square feet. As a result, grocery chains now prefer to locate in relatively large neighborhood shopping centers, ideally containing 100,000 square feet of space or more. This suggests that the development of small neighborhood shopping centers with standard grocery stores may be unlikely in the near future.

* **Regional mall space has grown since 1970.** Two new regional malls have been completed since 1970 in the urban/suburban ring and the I-270 corridor, White Flint Mall in North Bethesda and Lake Forest Mall in Gaithersburg. Major additions to the County's other two regional malls, Montgomery Mall and Wheaton Plaza, also have been made since 1970, and Wheaton Plaza has been enclosed. Every regional mall except Lake Forest Mall now has structured parking facilities, allowing the land to be used more intensively.

IV. RELATIONSHIP OF HOUSING TO EMPLOYMENT

* **In 1990, the County-wide ratio of existing jobs to existing housing units was approximately 1.5 to 1.** This is in line with the General Plan's land use objective of having a balanced relationship between residential growth and economic activities. Since Montgomery County households have an average of about 1.5 workers, a jobs/housing ratio of between 1.4 and 1.6 is reasonably balanced.

* **The potential future County-wide ratio of jobs to housing, based on the development capacity of all currently zoned and planned acreage for these uses, could range from 2.4 to 2.8 jobs per housing unit.** This zoned ratio of jobs to housing does not appear to be consistent with the General Plan's objective to "obtain a balanced relationship between residential growth and economic opportunities" although the Plan did not specify an exact ratio.

The General Plan objective concerning the balance of jobs and housing addressed the issue on a County-wide basis. The Plan clearly did not expect each smaller geographical area to strive for such a balance.

The buildout ratio of jobs to housing may be overstating the number of jobs. On average, employment sites use a smaller proportion of their holding capacity than housing. Industrial and retail buildings are designed for the functional use of their occupants more than to maximize floor area ratio (FAR). Many commercial uses, such as shopping centers and gasoline filling stations, prefer one or two story buildings even where a higher FAR is allowed. Surface parking is often preferred because it is usually more convenient and is much less expensive. The combination of low structures, green area, surface parking, and setback requirements results in lower than maximum use of available FAR. A housing site is considered fully developed, on the other hand, if it contains a housing unit of greater assessed value than the value of the land on which it is located, regardless of the size of the unit, setbacks and other development factors.

V. FARMLAND AND RURAL OPEN SPACE

*** The General Plan's commitment to farmland preservation has been reinforced by subsequent land use policies and zoning actions.** Changes in zoning, especially the adoption of the Rural Density Transfer (RDT) Zone and the introduction of the Transferable Development Rights (TDR) Program, have done much to protect Montgomery County farmland from residential development. In 1981, approximately 90,000 acres were rezoned to the Rural Density Transfer Zone and designated as the Agricultural Reserve. These zoning efforts complement state and local programs to purchase easements for the purpose of farmland protection as well.

*** The loss of farmland has slowed appreciably since 1969.** From January 1981 to November

1991, there have been only 76 subdivisions approved (213 lots) in the RDT Zone. This compares to 750 lots approved in 1978 alone. The decrease illustrates the dramatic decrease in development activity in the Agricultural Reserve.

*** The number of farms increased from 654 to 669 between 1969 and 1991.** At the same time, the average size of a farm declined from 177 acres to 155 acres.

*** The County's commitment to farmland preservation was reaffirmed in 1988.** In 1988, the Montgomery County Council appointed a working group to evaluate the Agricultural and Rural Open Space Preservation Programs. After thorough examination, the work group reaffirmed the agricultural and rural open space programs in Montgomery County and in particular, the 1980 *Functional Master Plan for the Preservation of Agriculture and Rural Open Space*.

*** Since 1981, land use and zoning strategies in the wedge have differentiated between agricultural and rural open space preservation and low density residential land use.** The Rural Density Transfer (RDT) Zone, the Rural Zone and the Rural Cluster (RC) Zone now distinguish the Agricultural Wedge from the Residential Wedge. The acreage in each zone is as follows: RDT - 90,000 acres, the Rural Zone - 4,000 acres, and Rural Cluster - 21,000 acres. The Residential Wedge with its one- and two-acre zoning is discussed in Section II.

*** Almost 32,000 acres of farmland are protected by State and County easements.** The protected land includes over 26,000 acres in easements through the County's TDR program, over 2,000 in the County's Agricultural Easement Purchase Program, almost 2,000 in the Maryland Environmental Trust, and another 1,700 acres in the Maryland Agricultural Land Preservation Foundation program.

*** Over 2,000 acres of open space are preserved by private conservation groups.** Maryland Environmental Trust easements in the