

MARKET ANALYSIS

BROOKVILLE ROAD

Lyttonsville, Maryland

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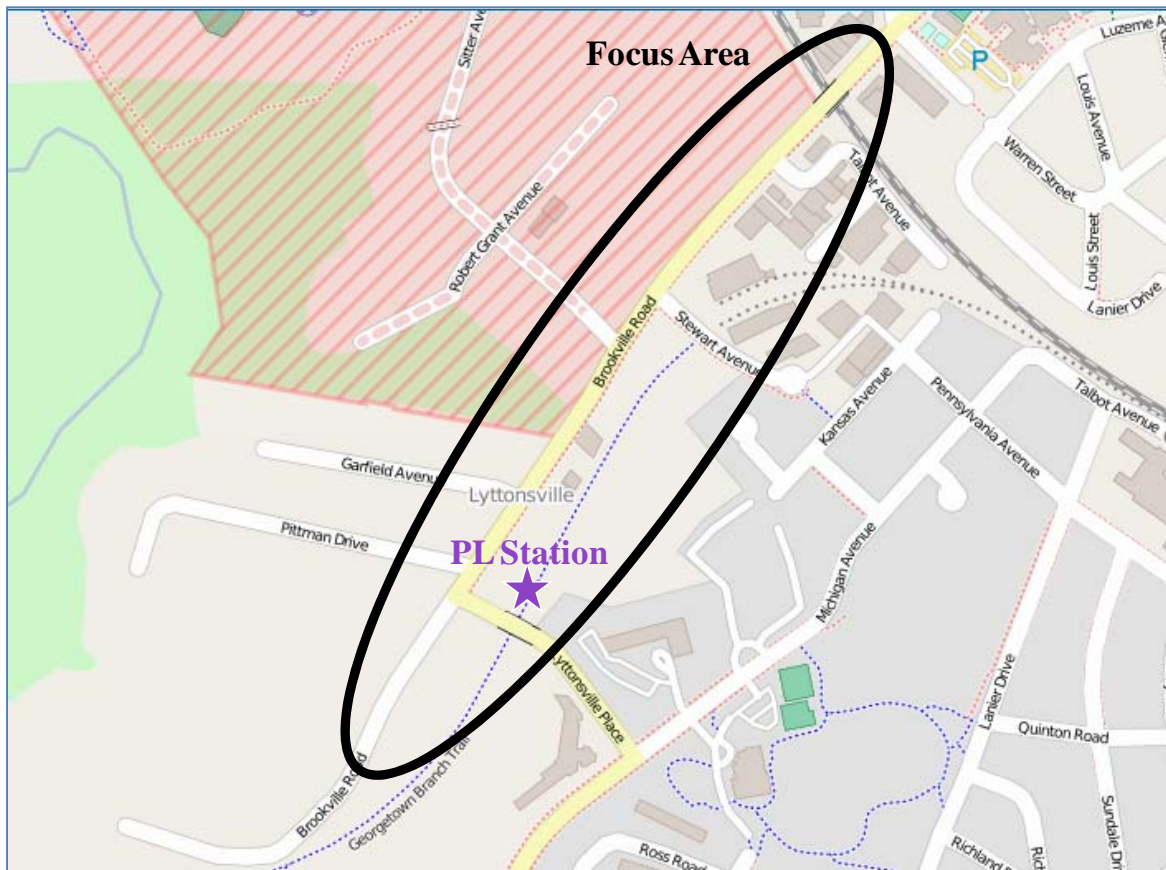
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I. BACKGROUND

As part of the Greater Lyttonsville Sector Plan process Bolan Smart Associates was asked to conduct a market analysis centered on Brookville Road proximate to the proposed Purple Line Station. The primary objective of the study was to assess possible market impacts and development scenarios that could be associated with the proposed Lyttonsville Station. The study addressed preservation of industrial uses, opportunities for additional retail uses, residential market factors and impact on affordability, role of governmental related institutional uses, zoning and planning policy parameters.

Exhibit 1
Brookville Road Focus Area



Source: ESRI and Bolan Smart

Tasks undertaken comprised an assessment of existing land uses, select inventory of competitive supply, stakeholder / property owner outreach, participating in community meetings, research on regional urban industrial areas, evaluation of zoning districts and creating possible redevelopment scenarios. Please note that the proposed redevelopment scenarios do not constitute plan recommendations.

II. SUMMARY

The Brookville Road area industrial location works for many types of users. The impact of the industrial focus, combined with isolated locational aspects and zoning provisions have constrained neighborhood oriented retail uses, and to a lesser extent, residential uses.

The location will continue to support a dynamic industrial and hybrid retail private market, plus major public institutional uses. There are relatively limited development pressures that may change this land use orientation, including the possible introduction of a Purple Line Station, with two primary caveats:

- The infill of key underdeveloped sites along or proximate to Brookville Road, with zoning provisions loosened to permit a wider range of retail uses and possible residential elements, will help enhance overall neighborhood balance of land uses and connectivity. This redevelopment of select core area properties will not of itself undermine the base industrial use of the overall zone.
- There needs to be a clear public policy commitment to preserve the viability of existing industrial and hybrid uses, focused on facilitating current use related reinvestment (not promoting a general transition to other uses), and in retaining / supporting industrial user operational needs in terms of street access, hours of operations, noise and other abatements, etc.

The arrival of the Purple Line is not going to dramatically change Lyttonsville, particularly given the relatively low projected ridership using the Lyttonsville Station. Though the proposed investment in infrastructure, including a reconstructed Lyttonsville Place Bridge and incremental infill development should provide for a better connected and more functional neighborhood, the Brookville Road area is likely to remain a cost competitive marketplace. In short, a conversion to significantly higher densities (and development costs) is not likely to be market supported.

A summary of the three possible development scenarios includes:

1. Minimal Planning Changes / Status Quo (5-10 years) – continued industrial uses with some infill, some added convenience retail and residential infill east of the Purple Line right-of-way;
2. Targeted Planning Changes (10+ years) – industrial conversion to medium density residential east of the tracks, pedestrian / bikeway / open space improvements and some Brookville Road enhancements; and
3. Major Infrastructure Changes (10-20+ years) – improved neighborhood connections, some by limited added retail and residential mixed-use west of the Purple Line right-of-way.

The indicated scenarios have the potential to occur regardless of transit improvements; especially given Lyttonsville's convenient inside-the-Beltway location, proximity to nearby neighborhoods, and access to transit in Silver Spring. There are a range of public policy modifications and interventions that can help guide this development balance, per those contemplated in the Greater Lyttonsville Sector Plan.

III. LAND USE INFLUENCES

The Brookville Road study area is a subset area of Greater Lyttonsville. It shares points of access with surrounding neighborhoods, but in most other ways is set apart. Its industrial origins are typical to locational practices that prevailed through the prior century. The presence and eventual expansion of US military uses was a major defining influence. Over time, land availability and locational attributes attracted larger local public utility uses, needed to support the growing suburban communities of lower Montgomery County.

The industrial and public institutional land uses proximate to Brookville Road continue to be as vital as ever to the wider community. The U. S. Army Forest Glen Annex, while shedding its more aged northern campus for private residential redevelopment, has in recent years dramatically expanded its investment in core facilities and operational reach. Other private and public light industrial oriented land uses have also seen continued expansion and reinvestment, with every reason to expect to be sustained well into the foreseeable future.

The earlier development drivers of a convenient location with available land and compatible use adjacencies continue to anchor the Brookville Road industrial sector. The critical mass of these uses is not going away, and is in many ways becoming more critical to the user base as other formerly competitive locations succumb to new development and growth pressures. The prospect of adding a Purple Line Station and Maintenance Yard adjacent to Brookville Road introduces a new chapter in this land use continuum.

Market Identity

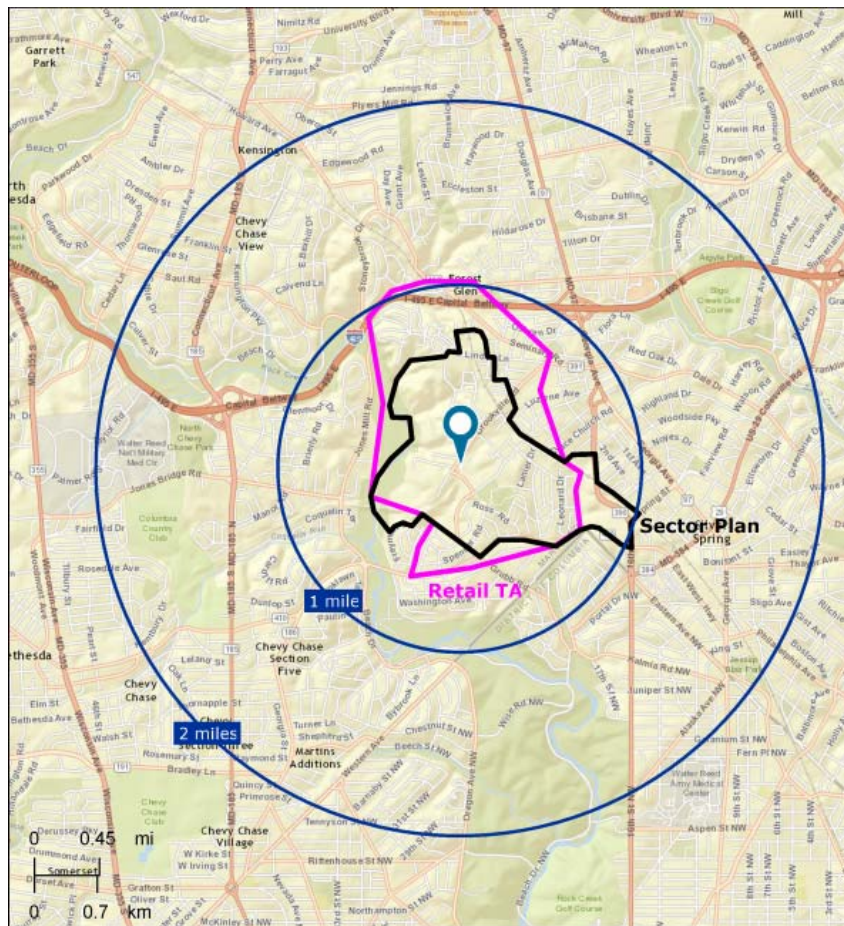
While Greater Lyttonsville represents an amalgam of clearly defined mixed income residential communities, large public institutional uses and private industrial areas, they co-exist quite independently. This relative segregation is manifested in a general lack of connectivity and cross-serving neighborhood amenities. The large public institutional uses cater to a wide geographic area, and the private industrial oriented and hybrid retail uses represent a mix of more local and sub regional predominantly smaller service businesses. The development pattern is mostly linear and accessed off Brookville Road. (For these reasons, the study area is commonly known as Brookville Road, and not some derivation of Lyttonsville.)

Demographic Highlights

For purposes of profiling retail demand potential focused on Brookville Road, demographic data was compiled and organized around a potential retail trade area. Demographic highlights are included in this section of the market analysis report to assist in describing neighborhood conditions and land use influences. The demographic implications specific to underpinning retail are referenced again in the Market Conditions section.

Primary Trade Area: A primary trade area (PTA) is a geographic area from which a user group generates the majority of its demand and is often analyzed to provide key population metrics. An illustrative retail PTA, indicated on Exhibit 2, was identified based on the combination of infrastructure, natural barriers, and most importantly, other locations of competitive retail space. The resulting polygon ranges between a half and one mile, encompassing a total of 1.36 square miles. A summary of some of the salient demographic characteristics defining the overall neighborhood is described below.

Exhibit 2 Study Area Demographic Geography



Source: ESRI and Bolan Smart

Resident Profile. The total estimated 2014 population located within the primary retail trade area is approximately 7,120 residents. The resident base has been relatively static, with less than 0.5 percent per annum growth since 2000. There are an estimated 2,565 households reported for 2014, which equates into an average household size of 2.7 residents. Family households comprise 65.3 percent family of households in the primary trade area. The median age is 35. Compared to Montgomery County, the resident profile is younger and more diverse.

Household Income. ESRI reported 2014 median household income of \$70,029 and average household income of \$93,676, approximately 41 percent and 33 percent lower respectively compared to Montgomery County.

Housing Characteristics. The majority of the homes (71 percent) in the primary trade area were built in 1969 or earlier, consistent with the general period of development for the greater neighborhood. The housing stock breakdown is 51 percent multifamily, 45 percent single family detached units, four percent single family attached units (townhomes). Note that this geographic area does not include Summit Hills Apartments. The homeownership rate is approximately 42 percent, compared with 66 percent for the County.

Business / Daytime Market Demand. The defined geographic area centered on Brookville Road has a total employment population of approximately 6,100, divided more or less 50/50 between reported public and private sector employers. While this represents a big number, a significant number of these employees work for all or the better part of the day in the field away from Lyttonsville every day, or in the case of the U.S. Army, basically sequestered on base.

**BSA Table 1
Demographic Data**

<i>Description</i>	<i>BSA Retail Trade Area</i>				<i>1/2 Mile</i>	<i>1 Mile</i>	<i>2 Mile</i>	<i>Montgomery County</i>
	<i>2000</i>	<i>2010</i>	<i>% Ch</i>	<i>2014</i>				
Population	6,586	6,789	3.1%	7,122	4,071	18,485	71,106	1,003,571
Race (%):								
White Alone				44.6%	42.2%	54.9%	59.7%	55.1%
Asian				7.1%	7.4%	6.8%	6.8%	14.7%
Black or African American				28.5%	29.4%	25.2%	23.4%	17.8%
Other				19.7%	21.1%	12.6%	10.0%	12.4%
Households (HH)	2,368	2,450	3.5%	2,566	1,421	7,304	30,540	367,499
% Family Households				65.3%	66.4%	58.3%	55.3%	68.0%
Average HH Size				2.7	2.8	2.5	2.3	2.7
Median Age				35	35	37	40	39
Median HH Income				\$70,029	\$67,200	\$81,322	\$91,622	\$98,530
Average HH Income				\$93,676	\$87,791	\$113,513	\$128,007	\$124,504
% Homes Owner Occupied				42.4%	37.9%	50.8%	52.8%	65.9%
# of Business Establishments				555	335	1,412	7,496	86,866
# of Daytime Employees				6,100	3,181	8,432	48,594	549,292
Public Sector				2,730				
Private Sector				3,370				

Source: US Census, ESRI and Bolan Smart

Property Characteristics

Zeroing in on the Lyttonsville non-residential used land area, there is a prominent data point that helps put into perspective the driving force of land uses. Not including the residential land area, approximately 40 percent of the employment related land area accommodates private users, and 60 percent public owned uses (three quarters Forest Glen Annex and 40+ acres of local oriented). The private and the local public industrial related uses are drawn to the location for the same reasons of location and land availability, both with an interest in long-term use sustainability. In short, the extensive public related employment use within the study area is dominant, very important to the greater public interest, and to varying degrees, not directly accountable to local planning efforts.

Private Properties: The typical privately owned industrial property proximate to Brookville Road is well maintained and features strong tenancy. While there are some open lot and storage related uses, the majority of the industrial properties are improved with buildings that are well suited to a variety of contemporary light industrial and hybrid retail uses. Excluding any prospective Purple Line Station related impacts, there is limited redevelopment pressure facing the more substantially improved properties, with infill development opportunities observed for vacant or lesser developed sites. Little in the way of obvious property speculation is currently being observed.

Appendix A features an exhibit detailing property characteristics specific to Brookville Road. With some noted exceptions, there are few grossly underused sites (i.e. vacant land areas, not income producing). There are multiple owners, some property configuration constraints (shallow road to Purple Line right-of-way property depths), plus terrain and access limitations, that represent typical challenges to major redevelopment. The primary observation is that the majority of the properties are well suited to continued as-is use.

Located east of Brookville Road are adjacent residential communities, comprising a mixture of mid 20th century built single family homes and multifamily complexes. As with the industrial base, these residential neighborhoods provide a cross section of more affordable multifamily housing options at a closer in location with strong demand characteristics. Case-by-case, there are market opportunities to consider expansion on select multifamily properties or adjacent vacant land, though relative to the existing base of overall households in the greater neighborhood, the addition of new units is likely to be fairly limited.

Existing Zoning

Zoning along Brookville Road proximate to the proposed Purple Line Lyttonsville Station is a mix of Moderate Industrial (IM) regulating the privately owned properties and residential zoning overlying most of the government and municipal use sites (e.g. U.S. Army Forest Glen Annex, Montgomery County Brookville Service Center, part of the Washington Suburban Sanitary Commission (WSSC) site and the proposed MTA Maintenance Yard site). There are no general commercial zones. The specific requirements of the IM zone include the following:

- a) permitted uses include, but are not limited to: light / artisan / medical and science manufacturing and production, day care facilities, landscape contractors, research and development offices, health clubs, indoor recreation and entertainment with less than a capacity of 1,000 people, dry cleaners, automobile repairs, sales and rentals, farm supplies and machinery sales, agricultural processing, etc.;

- b) the County's industrial zones do not allow residential uses;
- c) retail / service related establishments are limited to building and food service supply, home design and furnishings, wholesale or retail; computer programming and software sales and service, including data storage; wholesale trades limited to sale or rental of products intended for industrial or commercial users; and other retail/service establishment uses or a combination of office, retail/service establishment, or restaurant uses that occupy a maximum of 35 percent of the FAR (or 3,500 sf, whichever is greater, for restaurant use). Under these stipulations, a range of neighborhood serving retail uses, for example a convenience store, or a small shopping center of varied vendors, is not permitted. (See retail market conditions for discussion of retail land use issues.);
- d) up to 2.5 floor area ratio (FAR);
- e) maximum height of 50 feet (up to 120 feet for a conditional use per the Standard Method of development);
- f) setbacks (front and side yards) are 10 feet (increased 1.5 times when abutting any zone not industrial);
- g) required open space is five percent for sites under 10,000 sf and 10 percent for sites greater than 10,000 sf; and
- h) parking requirements in general per 1,000 square feet of gross floor area are 1.5 spaces for general industrial, 4.0 spaces for auto repair / storage / car wash, 5.0 spaces for retail / service and 2.8 spaces for R&D office.

Access Factors

Brookville Road serves the institutional and industrial core of Lyttonsville. Traffic counts on Brookville Road north of the Forest Glen Annex entrance were estimated at approximately 13,500 vehicles per day per MDOT in 2013. This includes Montgomery County Ride-On buses, both in service catering to Lyttonsville (multiple routes interconnecting with the WMATA regional network), and in much greater numbers, those vehicles returning to the bus parking depot at the Montgomery County site located at the southern end of Brookville Road. There is also substantial additional Montgomery County Department of Public Works truck traffic destined for the County site.

While technically connecting East / West Highway to the south with Georgia Avenue and the Capital Beltway to the north, Brookville Road is essentially a locational orphan, with heavier vehicle access primarily only from one direction to the north along a secondary road through residential neighborhoods. Though the truck traffic link to East / West Highway may be restored upon reconstruction of the Lyttonsville Place Bridge (currently subject to a 10,000 lbs. weight restriction), thereby relieving some of the traffic pressure concentrated on the northern end of Brookville Road, this improvement will not change the fundamental compromised access of the industrial setting. (As of 2013, traffic counts over Lyttonsville Place Bridge where it abuts with Brookville Road were estimated at 10,000 vehicles per day.)

Within the neighborhood, there is only one vehicular access directly to Brookville Road via the Lyttonsville Place bridge. Pedestrians can also access Brookville Road by cutting through from Kansas Avenue to Stewart Avenue north of the Lyttonsville Place bridge. In addition, the Capital Crescent Trail (CCT) runs parallel to Brookville Road along the proposed route of the Purple Line tracks. Improvements are planned for the CCT.

Purple Line Station

The Purple Line is a proposed 16-mile light rail line connecting Bethesda to New Carrollton. The Lyttonsville Station, located parallel to Brookville Road just north of the Lyttonsville Place bridge, is one of 21 planned stops. A primary reason a station is being planned for Lyttonsville is driven by being adjacent to the planned MTA maintenance yard facility.

According to the 2013 Purple Line Travel Forecast included in the Purple Line Environmental Impact Statement, Lyttonsville Station's daily boarding's are estimated to be 1,330 by 2030, one of the lowest (16th of 21) of the planned Purple Line stations. The net new trip demand is projected to be 41 percent of total daily boarding equating to 545 new users not otherwise presently using public transportation serving Lyttonsville. These are modest numbers by any standard, with equally modest implications for probable impact on land use in isolation from other demand factors.

Initial projections regarding station demand suggests that the majority, roughly 56 percent, will be pedestrian traffic while the remaining 44 percent will get to the station by bus. While no bus route changes have been planned yet, it is likely that route changes will be appropriate to improve access to the station. It has not yet been determined how much bike traffic from the CCT will be generated.

Access to the station platform is via a planned elevator running from the Lyttonsville Place Bridge down to the station. Plans are also being considered for a pedestrian connection directly from the station platform to Brookville Road.

In order to accommodate the new station and maintenance yard, it is necessary to realign the Lyttonsville Place bridge. This planned infrastructure improvement, which is needed regardless of the Purple Line due to deficient bridge structural conditions, has already been approved and is expected to be funded independent of the light rail planning horizon.

The actual location of the station requires the acquisition of property at 8827-8849 Brookville Road (United Therapeutics). It is likely that MTA will not ultimately need the entire 1.2 acre site. MTA has already acquired the entire site for the construction period. They likely will not require the northern portion of the site once completed, but eventual ownership and disposition has yet to be determined.

Purple Line Maintenance Yard Facility

MTA's maintenance facility will be located on the south side of the Lyttonsville Place Bridge. It will be used as the storage yard for the light rail vehicles. It will include daily light maintenance activities such as interior and exterior vehicle cleaning, daily inspections and light maintenance. (Heavy maintenance and repairs will take place at the Glenridge Maintenance Facility in Prince George's County.)

The Lyttonsville Facility will also include an Operations Center (an office building) and parking for Purple Line employees, plus 200 spaces for Montgomery County DOT employees. Parking for County employees is necessary since the maintenance facility is being built on two existing Montgomery County owned parcels (totaling 3.95 acres), one which is currently vacant, and the other which already provides for County parking.

- the maintenance facility will be active 24 hours a day, seven days a week
- it is not anticipated to generate much noise
- lighting will be directional
- the facility will be secured

Activity will probably be most noticeable at shift changes when Purple Line staff arrive or depart from work.

IV. MARKET CONDITIONS

Industrial

The light industrial related success of the Brookville Road study area can be attributed primarily to it being convenient and cost effective for users seeking an inside-the-Beltway location. The Brookville Road industrial market has the following characteristics:

- a) predominantly older facilities with a variety of space options and users (some parking constrained)
- b) critically located for regional building / maintenance industry
- c) sub regional serving auto service
- d) consumer oriented retail with production / warehouse space
- e) predominantly built out with a typical market FAR for industrial space of approximately 0.25
- f) some underdeveloped sites

The Brookville Road location serves as an important and sustaining land use for Montgomery County, foremost from a private market perspective, but also in the public interest. From a macro level, with diminishing industrial space elsewhere, there is priority market interest in the maintained viability of the Brookville Road location. Regarding sustainability, the combination of some limited Brookville Road area industrial property vacancies along with some underdeveloped sites suggests that there is sufficient physical capacity to accommodate the foreseeable industrial demand at this location. While this does not mean all possible newer tenants can be absorbed, especially those that may have a more prominent consumer retail orientation, it does suggest that the hybrid industrial market at the Brookville Road location is more or less in equilibrium.

**BSA Table 2
Brookville Road Industrial Market Summary**

<i>Strengths</i>	<i>Weaknesses</i>	<i>Opportunities</i>	<i>Threats</i>
<ul style="list-style-type: none"> • Proven industrial market • Private sector employment base • Inside the Beltway location • Range of cost effective rents price points & space types • Tenant tenure • Sustainable industrial area (DED supported) 	<ul style="list-style-type: none"> • Inadequate parking • Poor Access – trucks & customers • Limited visibility • Some older / obsolete space • Zoning restrictions (i.e. retail uses) • Traffic during rush hour (Annex) • No business association / branding • No residential neighborhood buffers 	<ul style="list-style-type: none"> • Expanding employment base • Lot consolidation • Zoning modifications • Diminishing supply of industrial land elsewhere • Improved neighborhood infrastructure / circulation 	<ul style="list-style-type: none"> • Possible increase in land values and rents • Possible conversion of industrial zoning • More traffic / access issues • Residential encroachment

Retail

Unlike well established and viable industrial and residential markets proximate to Brookville Road, retail uses are not a prevalent existing use. From the perspective of market demand, this condition is somewhat surprising, given the scale of local employment and the predominance of Brookville Road as a focal point. Upon deeper consideration, existing zoning use restrictions, isolated access and ample peripheral retail nodes would seem to account for there being very limited retail uses along Brookville Road. The study area is surrounded by retail along the Georgia and Connecticut Avenue spines to the east and west and in downtown Silver Spring.

Some retail related observations for the study area include:

- a) very limited existing convenience retail uses
- b) secondary access / not off of major arteries
- c) presence of sub regional industry showrooms
- d) mix of household and worker market demand (mixed-market patronage / segmented market)
- e) demand for hybrid / production retail
- f) low vacancy rates at peripheral retail nodes

**BSA Table 3
Brookville Road Retail Market Summary**

<i>Strengths</i>	<i>Weaknesses</i>	<i>Opportunities</i>	<i>Threats</i>
<ul style="list-style-type: none"> • Inside the Beltway location • Large daytime employment base • Favorable population and household counts • Limited existing retail inside trade area 	<ul style="list-style-type: none"> • Inadequate parking (convenient and cost effective) • Poor Access – deliveries & customers • Not a destination (no critical mass) • Proximate viable retail nodes • Unknown institutional user impacts 	<ul style="list-style-type: none"> • Expand retail zoning • Purple Line decision will solidify market assumptions • Interim opportunities from displaced Spring Center tenants • Impetus for a stronger retail identity • Station traffic • Expanding employment base • Demand for more supply • Hybrid retail tenants 	<ul style="list-style-type: none"> • Uncertainty of Purple Line opening may impede investment decisions • Industrial market perception / lack of branding • Secondary submarket • Traffic challenged on Brookville Road

Supply Overview Within Lyttonsville Sector Plan Area (< 100,000 sf).

- limited neighborhood convenience uses – 8,000 sf (Party Warehouse, Zimmerman’s Hardware, Brookville Eatery, El Norteno’s, Auto Parts, etc)
- selected community service related – 12,000+ sf (Dog Day Care, Crossfits, Silver Star Gymnastics)
- sub regional building industry showrooms – 20,000 sf (Appliance Builders and Counter Intelligence)
- Summit Hills mixed retail – 10,000 sf (total of close to 30,000 sf but only partially occupied)
- Spring Center neighborhood shopping center – 43,000 sf (fast food, 7-11, Post Office, jewelry, etc.)
- Forest Glen Annex – commissary & gas station

Proximate Retail (approximately 2.0 million sf). The majority of nearby retail, approximately 95 percent, is within three miles of Brookville Road.

- Georgia Avenue / Seminary Road / Capital Beltway – 160,000+ sf (Snider’s, Staples, CVS, banks, cleaners, gas)
- Downtown Silver Spring – 1.75+ million sf (Whole Foods, restaurants, retail, banks)
- Connecticut Avenue – 95,000+ sf (grocery store, TW Perry, Starbucks, cleaners, gas)
- Rock Creek Center – 28,500+ sf (deli, paint, restaurant, sports club, cleaners)
- Forest Glen – < 3,500 sf (restaurant and gas)

Retail Demand Potential: Does neither an existing supply nor history of prior neighborhood oriented retail uses in the Brookville Road study area mean that there is in fact no demand? Consumers are taking care of their needs, albeit by either patronizing the peripheral shopping centers, or attending to their purchases further afield. In order to assess possible underserved retail potential some simple retail demand modeling assumptions were considered (see Table 1, Demographic Highlights for source data). The principal demand variables include:

- a) the amount of neighborhood retail space that is typically supported by the study area resident population (10 sf per person, 7,100 persons, or 70,000 sf).
- b) a capture factor (20 percent) estimating how much resident based consumer expenditure can stay within the trade area versus being spent elsewhere (14,000 sf).

- c) the amount of retail demand generated from study area employment (2 sf per job, 6,100 jobs, or 12,000 sf) and transient sources (1 sf per average daily vehicle count, 13,000 average daily vehicle counts on Brookville Road, or 13,000 sf).
- d) adjustments for the industrial hybrid retail role of the location attracting sub regional and regional consumers (2.0 percent of total private industrial space of 1.14 million sf in the overall Brookville Road study area, or 20,000 sf).

Taken together, the limited retail demand indicators outlined above suggest that the selected Brookville Road primary retail trade area could support upwards of another 30,000 to 40,000 square feet of new neighborhood oriented retail space, plus some amount of hybrid retail associated with industrial “maker” spaces. While the scale of the potential market demand is insufficient to support a modern full sized grocery store, a smaller format grocery operation might be feasible (though improbable given the proximity to nearby supermarkets). Clearly there is unmet demand for a full service convenience store and expanded restaurant choices. (Note: virtually no deduct is necessary to account for existing retail space, given its very limited supply and minimally competitive market presence.)

An important factor in considering how potential retail demand would in fact translate into successful store operations is to understand not just the gross population, employment and other data points, but to appreciate the nuances thereof. The more heterogeneous the sources of market demand, the more diffused becomes the potential retailing concept. The Brookville Road study area has a wide range of consumer sub groups. Daytime employment spans from a highly scientific research oriented base at the U.S. Army facility to a wide variety of light industrial and community field service laborers. The residential base also represents a fairly wide cross section of distinguishing ethnic and economic characteristics. These demand characteristics make for a challenging environment for some retail to succeed.

Then there is also the physical space and locational elements that influence retail demand propensities. For example, despite its large employment, the direct off-site retail demand that may emanate from the U.S. Army facility is constrained by a host of security related hurdles affecting staff travel times, as well as the simple practice of having a short lunch period (usually one half hour) for lunch. (Based on observations at other large federal installations in the Washington region and elsewhere, the phenomenon of limited off-site retail patronage compared to the size of the on-site employment is widely replicated.) At a lesser scale, security requirements, vehicular constraints and labor practices at other public oriented service facilities such as the WSSC and Montgomery County Service Center also tend to generate less off-site retail demand than might otherwise be expected.

Residential

The Greater Lyttonsville housing market has both an abundant supply of single family detached residential dwellings and multifamily units, including affordable options. Residential characteristics include:

- a) mix of unit types – 50/50 single family and multifamily split (excluding Summit Hills)
- b) also lack of some unit types, most notably in townhomes and newer multifamily concepts
- c) strong base of schools, parks and recreation
- d) convenient amenities encompass several nearby commercial nodes including downtown Silver Spring, access to public transportation and the Capital Crescent Trail
- e) ongoing renovations of older properties
- f) some vacant / underdeveloped sites (and development constraints), including land areas apart of or adjacent to Paddington Square, Friendly Gardens, and current industrial oriented sites proximate to the CCT / Purple Line alignment
- g) some marketplace evidence of willingness for residential colocation peripheral to industrial type settings
- h) some upward valuations, but not market transforming
- i) potential for new residential investment to directly and indirectly help underwrite the addition of retail / mixed-use oriented space

With the majority of the existing housing stock dating back over 40 years, coupled with an active inner beltway marketplace, plus the prevalence of a relatively lower density / underutilized land area, there are a number of marketplace prospects for residential redevelopment.

**BSA Table 4
Brookville Road / Greater Lyttonsville Residential Market Summary**

<i>Strengths</i>	<i>Weaknesses</i>	<i>Opportunities</i>	<i>Threats</i>
<ul style="list-style-type: none"> • Stable single and multifamily market • Resident tenure • Inside the Beltway location • Proximity to amenities / Silver Spring • Proximity to public transportation • Schools 	<ul style="list-style-type: none"> • Older housing stock • Limited housing stock diversity • Ample multifamily supply regionally • Poor internal neighborhood circulation • Zoning restrictions • Industrial use adjacencies and commercial traffic west of tracks • Poor traffic controls • No business association / branding • No benefit to institutional uses 	<ul style="list-style-type: none"> • Enhanced Capital Crescent trail • Improved neighborhood infrastructure and linkages • Redevelopment opportunities • Supply diversification 	<ul style="list-style-type: none"> • Possible increase in land values and rents • Market doesn't materialize • Funding shortfalls for public infrastructure improvements • MTA operation and maintenance yard impacts

Other Land Uses

For the foreseeable future the Brookville Road location is not projected to become a destination for major office use other than providing for office space ancillary to the light industrial users, some back office support for other nearby employers, and a limited number of community serving services. Hotel use is not considered likely.

V. DEVELOPMENT ISSUES AND CONSIDERATIONS

Listed below is a summary of issues and considerations influencing possible future development scenarios for the area focused on Brookville Road. These items address market feasibility factors as well as input from property owners, residents and employers, gathered during the course of the research for this study, including participation in a number of public planning forums and meetings.

Economic Costs

- a) Some soil conditions and topography hurdles
- b) Existing use value of land and improvements often exceeds the potential redevelopment value of the land alone *
- c) Long term reinvestment in existing facilities and uses may be deterred due to landlords and users anticipating the prospect of some alternative type of future redevelopment occurring nearer term, undercutting investment in present industrial oriented uses
- d) Future densification can add value, but market conditions along Brookville Road are not likely to justify high-rise construction costs
- e) Related to densification, the premium cost for providing 100 percent structured parking, especially below grade, is not likely to be justified (though partial structured parking may be feasible case-by-case)

Regulatory Environment

- a) Some existing zoning constraints limiting retail and residential uses
- b) Strict and possibly burdensome parking requirements per zoning (especially as may apply to industrial hybrid retail use)
- c) Development restrictions within the potential fall line of a tall radio antenna located directly south of the Brookville Industrial District (WASH FM property)
- d) Public land uses that are not generally subject to municipal land use regulations (especially at U.S. Federal installation)

* The concept of redevelopment thresholds applies to the value at which future development can support a land value that exceeds the overall current value of a particular property as already improved (and earning income). For example, if new residential development can support a land value premised on 40 units to an acre at a raw land price of \$35,000 per unit, the threshold value for site would be \$1.4 million. If the prevailing property value as currently used exceeds this amount, then there is no direct motivation to pursue redevelopment for alternate use. The Brookville Road Property Profiles Table in Appendix A illustrates how this principle may apply to various improved or vacant properties.

Industrial

- a) Property values as improved generally exceed raw land redevelopment value
- b) Most of current built inventory remains useable (not obsolete)
- c) Some underdeveloped sites / vacant land infill opportunities (sufficient to accommodate future demand)
- d) Numerous property owners (with exceptions, not consolidated)
- e) Continued viable market for variety of users
- f) Some user critical mass benefits and synergies (i.e. complementing auto service, building trades, etc.)
- g) Some limited parking

Retail

- a) Possible backfill demand shorter-term impacting Brookville Road if part of Spring Center at the proposed Woodside / 16th Street Purple Line Station is demolished
- b) Limited demand boost likely from Purple Line
- c) Number of locational and building type options (free standing, strip center, part of other mixed use)
- d) Needs to be viewed as auto-centric, including capacity to park smaller and medium sized trucks
- e) Limited potential impact on traffic patterns due to small scale (possible actual reduction if reduces trips to peripheral shopping venues)

Residential

- a) Ongoing renovations of older properties
- b) Limited demand boost likely from Purple Line (with CCT bike access being as important)
- c) Some vacant or underdeveloped sites (with case-by-case construction constraints)
- d) Potential for more housing type diversification (i.e. townhomes and multifamily – both rental and ownership)
- e) Concerns with compatible adjacent land uses and traffic along Brookville Road
- f) Some upward property valuations, but not market transforming (no wide scale knock downs or pop ups of existing single family homes)
- g) Extensive inventory of market affordable units east of Brookville Road, with probable continued affordable base (especially for multifamily)
- h) Market potential for more urban concepts, shifting some from classic suburban model
- i) Likely additional net number of units / households over time, but not enough to transform the existing character of the neighborhood
- j) Resident concerns about possible impacts from expanded demand on local schools, some related to rollover of household types in existing homes, and some from possible net new housing units

Institutional Uses

- a) Limited impact on off-site land uses
- b) Major off-site impact in form of various types of generated traffic
- c) Homeland Security access and land use restrictions (no air rights)
- d) Assumed nearer term use continuity; hypothetical longer term reuse / conversion to other uses

Brookville Road Study Public Policy Objectives

Some working assumptions based on discussions with M-NCPPC for purposes of formulating redevelopment opportunities include:

- a) Objective of industrial land use preservation (retaining as much of the existing supply net of any MTA takings)
- b) No change or additional incentive above the existing County requirements for affordable housing
- c) Other objectives related to land use compatibility and environmental stewardship

VI. DEVELOPMENT SCENARIOS

The redevelopment potential for Brookville Road proximate to the proposed Purple Line Station depends on property ownership interest as well as economic feasibility. Vacant sites are impacted by size, configuration and adjacencies, while improved properties may house tenants with viable existing businesses. Understanding these redevelopment dynamics, the three scenarios are structured to build off each other. However, it is also quite possible that certain elements of each scenario get implemented in some other combination. The scenarios represent progressively higher investment hurdles requiring more implementation time, not necessarily a unified sequential action plan. Implementation of scenario redevelopment opportunities could occur with or without a Purple Line station, with higher intensity mixed-use land uses more dependent on the actual arrival of the Purple Line.

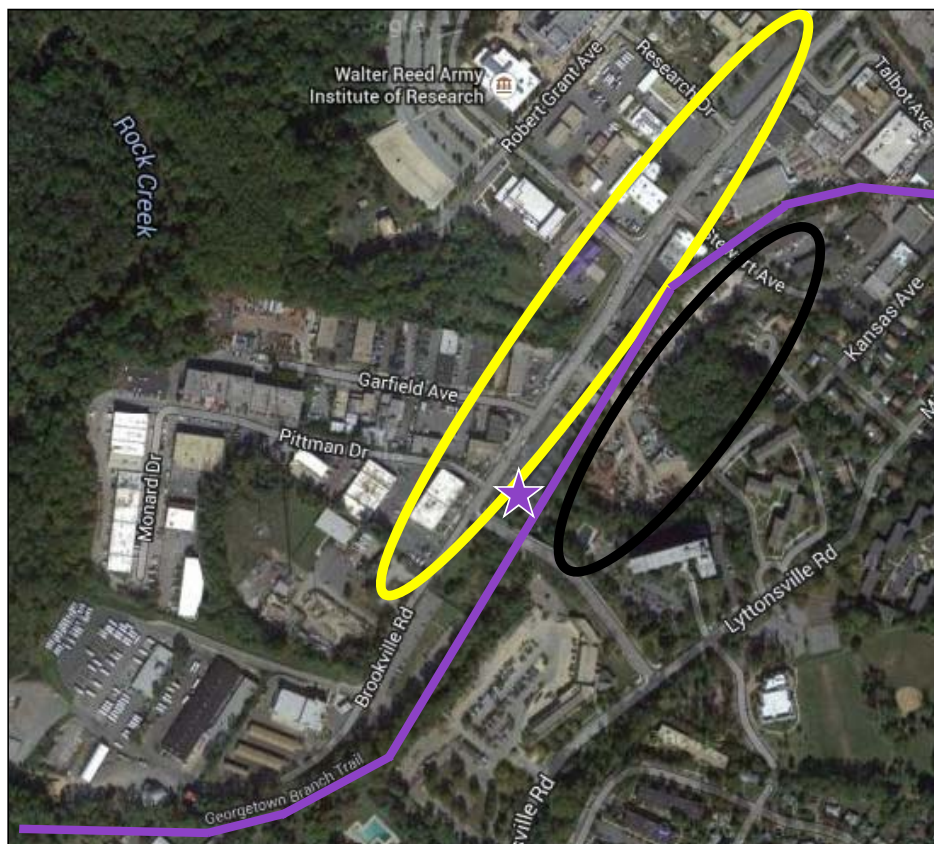
The first scenario, Minimal Planning Changes / Status Quo should happen over the next 10 years regardless of any Purple Line Station impacts. The second scenario, Targeted Planning Changes, adds to the status quo by primarily introducing higher density developments and enhanced infrastructure that will likely occur beyond a 10 year time horizon. The third scenario, Major Infrastructure Changes, builds on the prior scenarios and ultimately provides maximum neighborhood connectivity and access between all land uses surrounding the Brookville Road area. These changes would result in more density as well as possible mixed-use residential development west of the tracks along Brookville Road. Given the higher investment hurdle, the third scenario is more likely to occur in the 10 to 20 year time frame.




Three Scenarios

There are a number of approaches for casting the future of the subject area:

1. Minimal Planning Changes / Status Quo
 - a) Some convenience retail development along Brookville Road (25,000 sf)
 - b) Infill of existing residential sites east of tracks (100 multifamily and townhouse units)
 - c) Select additional residential units at existing multifamily developed sites
 - d) <50 percent reliance on structured parking in new development
 - e) Continued industrial use and some infill of underused sites
 - f) General preservation of existing market affordable multifamily residential
 - g) Property-by-property value increase / reinvestment in existing single family residential
 - h) 5-10 year timeframe

Exhibit 3
Minimum Planning Changes Scenario

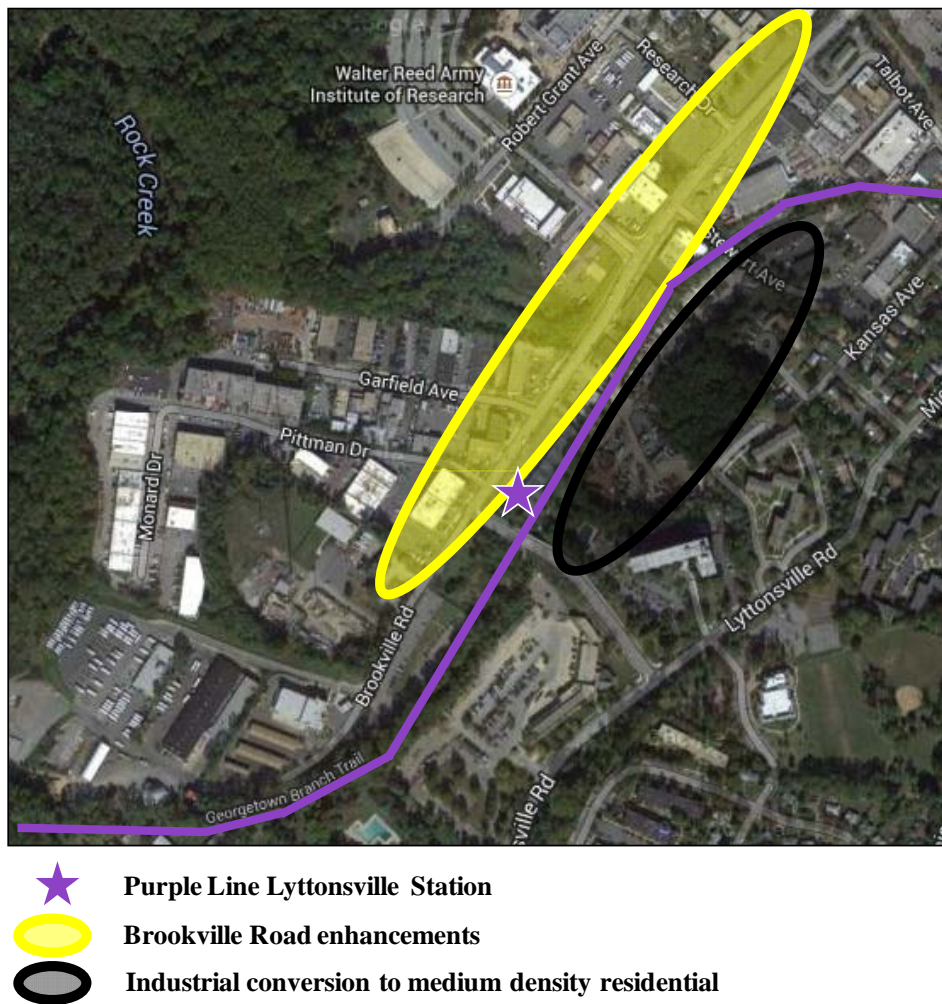


-  Purple Line Lyttonsville Station
-  Some convenience retail
-  Residential infill and redevelopment

2. Minimal Planning Changes / Status Quo + Targeted Planning Changes

- a) Some industrial use conversion to medium density residential east of tracks (300 multifamily and townhouse units including possibilities in the Stewart Ave vicinity)
- b) Pedestrian / bikeway / open space improvements
- c) Brookville Road enhancements
- d) Encouraging residential anchored redevelopment at select larger sites proximate to the Purple Line right-of-way
- e) 10+ year time frame

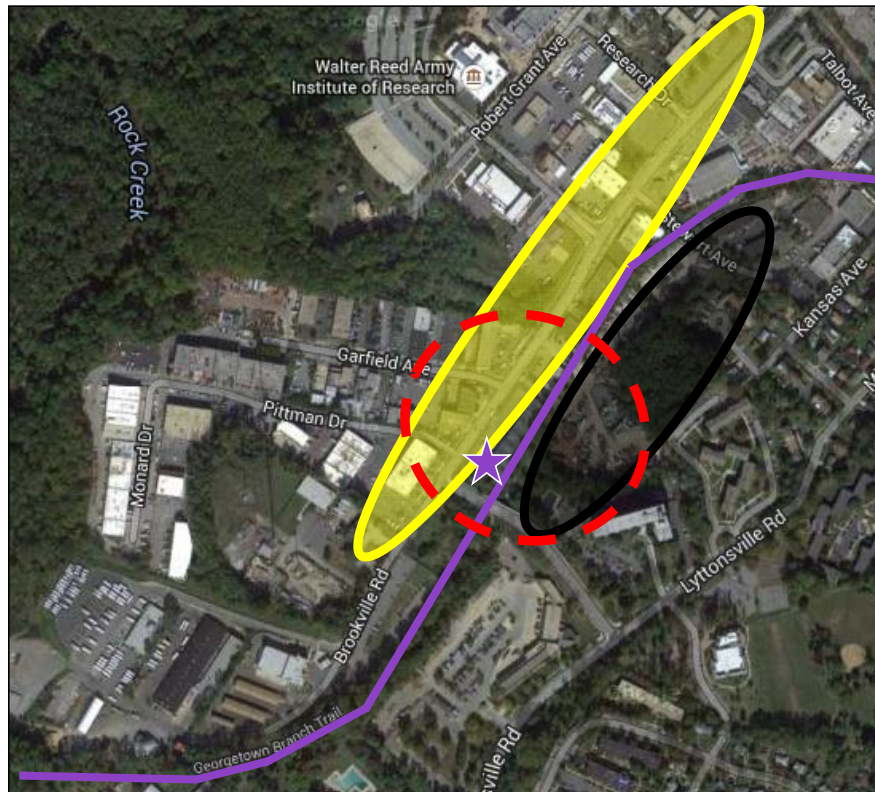
Exhibit 4
Targeted Planning Changes Scenario



3. Minimal Planning Changes / Status Quo + Targeted Planning Changes + Major Infrastructure Changes

- a) Added east/west neighborhood connections
- b) Other possible road network improvements
- c) Market supported residential mixed use west of tracks (250 units)
- d) Some additional neighborhood serving retail demand
- e) No major allowed density changes (existing FAR / heights sufficient) in the IM zone
- f) More extensive use of structured parking
- g) Preservation of majority of existing industrial /flex land uses
- h) 10 to 20 year time frame
- i) Possible longer term reevaluation of Montgomery County and WSSC sites

**Exhibit 5
Major Infrastructure Changes**



- ★ Purple Line Lyttonsville Station
- Some additional retail and residential mixed-use
- Industrial conversion to medium density residential
- Improved neighborhood connectivity

Planning Policies and Practices

Urban Industrial Area Examples

Research was undertaken on six urban industrial areas in the Washington region regarding preservation of industrial uses and opportunities. Preserving viable industrial land uses face challenges such as conflicting land use adjacencies, municipal / institutional priorities, infrastructure and transit investments, desire for more community amenities, etc. Summarized below are observations for the six urban industrial area examples analyzed (see Appendix B for Urban Industrial Area Example descriptions).

- a) Industrial preservation may be needed in various degrees (but not a given) to protect existing industrial uses from being converted to other land uses;
- b) In order to be meaningful, preservation policies need to target maintaining a significant amount / critical mass of existing industrial uses;
- c) Despite any policy intent, next to no new industrial related construction is noted or expected;
- d) Where public policy encourages new industrial related construction, it advocates more vertical mixed-use concepts defined by flex space as compared with traditional single use industrial / warehouse configurations;
- e) Each urban industrial area example is accessed off a major artery;
- f) Each example also tends to be adjacent to or inclusive of multipurpose consumer retail offerings (and all have major self storage facilities); and
- g) Two important components of urban industrial areas are that they provide needed service uses and municipal serving sites.

Other Comments

To realize some of the redevelopment scenarios, there are a variety of planning policies and practices that may apply (See also M-NCPPC Industrial Land Use study recommendations, October 2013.).

Sustaining and Augmenting Existing Uses

- a) Restrict up zoning on a district-wide basis or introducing other regulatory measures that may undercut or discourage continued reinvestment in present land uses.
- b) Embracing flexible truck access and parking provisions, recognizing the imprecision and variable needs of different user groups.
- c) Recognizing that the historical existing industrial zones should not be subject to new nuisance buffers simply for the purpose of facilitating alternative use new construction.
- d) Dedicating public resources towards promoting the operational aspects of industrial districts: a) provide small business assistance; b) assist with the site selection process, especially for displaced tenants within the County; and c) enhance marketing and branding of industrial districts to improve consumer visibility and appeal.

- e) Preserving and expanding “maker’ related retail sub districts.
- f) Containing existing and new civic / municipal uses beyond MTA’s Purple Line planned facilities since the area already has significant acreage dedicated to public service related needs.

Implementations for Future Developments

- a) Creating an overlay zone(s) providing for more development flexibility in terms of uses. Current IM zoning along Brookville Road does not allow for convenience retail or residential uses. (Note that at a current 2.5 FAR, there is generally plenty of density already permitted to provide for cost effective new construction.)
- b) Not mandating a mix of uses, but also not restricting alternative uses.
- c) Allowing for the provision of parking in the most cost effective manner (facilitate convenient surface parking and street parking for transient demand).
- d) Encouraging better environmental stewardship.

APPENDIX A

Brookville Road Property Profile Exhibit

Brookville Road Property Profiles

#	BR Address	Owner	Tenants	Year Built	Acres	Bldg SF	FAR	2015 Proposed Tax Assessment			Property Value / Acre	Comments
								Land	Building	Total		
1	9153	The Jaffe Group	Chair Works, Art of Glass	1966	0.83	33,088	0.92	\$1,587,300	\$779,700	\$2,367,000	\$2,858,116	Land value 67%; for sale @ \$4.195M
2	9151	Quattro - Justin Hobbs	Quattro Auto Body, Enterprise	1964	2.01	9,554	0.11	\$1,835,700	\$719,100	\$2,554,800	\$1,273,089	Land value 72%, consolidate with #1 ?
3	9141	Mander's Associates	Manders Decorating	1989	0.40	8,000	0.46	\$471,900	\$771,900	\$1,243,800	\$3,099,893	Building value 62% and in good condition
4	9107	F&I Properties	surface parking lot		0.09			\$84,900	\$100	\$85,000	\$914,900	Common ownership, SEC Talbot
5	9105	F&I Properties	Allied Masonry	1954	<u>0.17</u> 0.26	5,400	0.74	\$153,000	\$350,300	<u>\$503,300</u> \$588,300	<u>\$3,007,373</u> \$2,260,417	
6	9101	Brookville Rd JV	Radial Tire	1957	0.17	5,792	0.77	\$202,500	\$415,200	\$617,700	\$3,587,602	Building value of 67%, small site
7	9015	Garfield Prop. / TW Perry	Counter Intelligence	1970	2.87	32,809	0.26	\$3,250,400	\$367,200	\$3,617,600	\$1,260,490	TW Perry moving in / to be owner occupied
8	8951	Yogesh Phiyoni	Appliance Builders Wholesale	1989	0.20	14,000	1.58	\$265,900	\$1,258,900	\$1,524,800	\$7,492,418	Bldg value 83%, SEC Stewart, limited parking
9	8943	Zanoff Family	Vacarro's Dessert (@ 8949)	1964	0.28	13,536	1.12	\$327,100	\$1,226,000	\$1,553,100	\$5,584,237	Common ownershipshallow sites, across from base entrance
10	8921	Zanoff Family	BV Eatery, Frames, Tinting	1977	<u>0.57</u> 0.85	12,000	0.48	\$521,500	\$970,300	<u>\$1,491,800</u> \$3,044,900	<u>\$2,616,371</u> \$3,589,409	
11	8917	Campanaro	El Nortena, Airco Supply (8915)	1986	0.10	2,800	0.64	\$130,600	\$355,600	\$486,200	\$4,862,000	Common ownership, larger site on east side of tracks
12	8913	Campanaro	Brookville Landscape		<u>0.10</u> 0.20			\$89,700		\$89,700	<u>\$871,006</u> \$2,837,164	
13	8909	Campanaro	Perche Construction ??		1.87			\$1,547,600		\$1,547,600	\$827,596	
14	8913	Fang Siblings	Rickman Design / Furniture	1965	0.22	17,056	1.77	\$423,300	\$767,600	\$1,190,900	\$5,391,354	Common ownership, smaller sites
15	8907	Fang Siblings	Parking		<u>0.08</u> 0.30			\$69,100		<u>\$69,100</u> \$1,260,000	<u>\$913,504</u> \$4,249,098	
16	8905	Robert Gray	Ward & Gray	1980	0.25	5,400	0.50	\$477,000	\$179,600	\$656,600	\$2,638,028	Owner occupied?
17	8901	Rubin, Kim, Tolbert & Lee	Code 3 Towing (Cloney PM)		0.13			\$253,600		\$253,600	\$1,916,187	Vacant small site
18	8900	Craig Zimmerman	Abe Networks, Cycles	1983	0.66	3,240	0.11	\$603,400	\$1,401,800	\$2,005,200	\$3,039,408	NWC Garfield
19	8850	Craig Zimmerman	Brookville Auto, Zimmerman	1962	0.54	19,724	0.84	\$494,000	\$1,391,300	\$1,885,300	\$3,490,910	SWC Garfield
20	8810	Freemont One - WWDC	Party Warehouse, Medical	1966	2.82	66,018	0.54	\$2,208,400	\$2,638,800	\$4,847,200	\$1,720,956	Mixed-use redevelopment site fronting station
21	8827	United Therapeutics	Noland (8849 Brookville Rd)	1972	1.17	23,320	0.46	\$1,073,600	\$2,736,100	\$3,809,700	\$3,245,849	Planned Purple Line Lyttonsville Station
22	8800	Clear Channel Comm.	Chancellor Media Corp	1971	9.93	20,525	0.05	\$9,085,200	\$1,108,000	\$10,193,200	\$1,026,311	Between Ride on and WDDC

Sources: Montgomery County Tax Assessments, CoStar and Bolan Smart

APPENDIX B

Urban Industrial Area Examples

- a) downtown Silver Spring, Maryland
- b) downtown Kensington, Maryland
- c) Twinbrook Parkway and Parklawn Drive, Rockville, Maryland
- d) Westbard Planning Area, River Road, Bethesda, Maryland
- e) Four Mile Run Drive / I-395, Arlington, Virginia
- f) Eisenhower Avenue West, Eisenhower Ave. / South Van Dorn Street, Alexandria, Virginia

Examples of Urban Industrial Areas

A regional research effort was undertaken to identify urban oriented industrial areas that have experienced or are considered susceptible to redevelopment pressures, particularly related to mass transit. Selection criteria for these potentially comparable industrial districts comprised location, size, types of uses and buildings, access, adjacencies and proximity to transit. Six areas were identified as providing a basis for further evaluation including:

- a) downtown Silver Spring, Maryland
- b) downtown Kensington, Maryland
- c) Twinbrook Parkway and Parklawn Drive, Rockville, Maryland
- d) Westbard Planning Area, River Road, Bethesda, Maryland
- e) Four Mile Run Drive / I-395, Arlington, Virginia
- f) Eisenhower Avenue West, Eisenhower Ave. / South Van Dorn Street, Alexandria, Virginia

Selected Urban Industrial Area Comparability

<i>Description</i>	<i>Brookville Rd / Subject</i>	<i>Downtown Silver Spring</i>	<i>Kensington</i>	<i>Twinbrook</i>	<i>Westbard</i>	<i>Four Mile Run</i>	<i>Eisenhower Avenue</i>
<i>Location</i>							
Mass Transit	No	Yes	Yes	Yes	No	No	Yes
Accessed thru Residential	Yes	No	No	No	No	No	No
Proximity to Beltway	= 1 mile	2+ miles	< 2 miles	3+ miles	= 3 miles	1+ miles to I-395	< mile / multiple
<i>District Type</i>							
Dominant Land Use	Construction / Landscape	Public Storage / Auto	Furniture / Landscape	Furniture / Auto	Construction / Auto	Service Commercial	Fed Ex / UPS / Auto
Vacant/Underutilized Sites	Yes	No	No	No	Yes	Yes	Yes
Within 1/2 mile of retail	No	Yes	Yes	Yes	Yes	Limited	Limited
<i>Transferable Considerations</i>							
Market Transition Pressure	No	Yes	No	Yes	Yes	Yes	Limited
Adaptive Reuse	No	No	No	No	No	No	Yes
Preservation Policies	Pending	No	Yes	Some	Some	Pending	Pending

Source: Municipal reports, Bolan Smart

While every selected example is unique to the special circumstances defining their respective situations, the purpose is to identify salient factors that may be applicable to current planning efforts in Lyttonsville. Specific transferable considerations evaluated include:

- a) current development and uses
- b) conditions causing change (i.e. normal market factors or directly related to transit)
- c) policy and regulations
- d) land use transition process (timing and implications)
- e) adaptive reuse of buildings
- f) impact on existing industrial uses / buildings
- g) does it matter?

Downtown Silver Spring, Maryland

- a. *Current Development and Uses:* Commercial and municipal development activity is evidenced in the core areas of what is defined as downtown / Central Business District (CBD) in the 2000 Silver Spring Master Plan. The two industrial districts, located in the southern most areas of the downtown plan bisected by railroad tracks, have been impacted by Montgomery College developments. To the west of the railroad tracks, the entire designated I-1 industrial zone (now IM 2.5 with 50 foot height limit) was redeveloped in 2007 with the Morris & Gwendolyn Cafritz Foundation Arts Center and adjoining 350 space parking garage. To the east of the tracks, the industrial district is predominantly auto related and self storages uses but includes a Montgomery College East Campus parking garage. These areas (east of the tracks) were previously zoned both I-1 and I-4 and are now light industrial (IL) with a 1.0 FAR and moderate industrial (IM) with a 2.5 FAR respectively and 50 foot height limits.
- b. *Conditions Causing Change:* Both enhanced transit and improved market conditions over time have resulted in redevelopment in downtown Silver Spring. Specific to the industrial zones is the expansion of an institutional use.
- c. *Policy and Regulations:* The 2000 Silver Spring Master Plan primarily focused on higher densities near the core of the downtown, encouraged redevelopment consistent with the approved Urban Renewal Plan for Silver Spring, used zoning initiatives such as overlay zones to encourage redevelopment in revitalization areas outside the Core, and encouraged new housing development. The plan also emphasized providing a balanced transportation system and maximizing Silver Spring's role as a transit hub. At the time the plan was approved, the Silver Spring landscape had many more industrial type buildings and uses. The plan focuses on revitalizing the CBD and concentrating the most intense development in the core area. The industrial zone located in south Silver Spring east of the railroad tracks was preserved but the industrial zone west of the tracks was redeveloped for use by Montgomery College.
- d. *Land Use Transition Process:* The transition of land uses started in the early 2000s in the CBD with the delivery of the 500,000+ square foot Discovery Building in 2003 followed by the Peterson Companies 1.2 million square foot mixed-use Town Center project several years later.
- e. *Adaptive Reuse of Buildings:* Some buildings throughout the downtown Silver Spring plan were adaptively reused but not in the industrial districts.
- f. *Impact on Existing Industrial Businesses:* There has been displacement of existing industrial uses west of the railroad tracks (institutional use encroachment).
- g. *Does it Matter?* Yes but no. Downtown Silver Spring should be a higher density commercial center with limited industrial uses, especially since there are proximate industrial districts to downtown Silver Spring.

Kensington, Maryland

- a. *Current Development and Uses:* There has been some incremental transaction activity but nothing that has resulted in new development activity. The existing uses in the Kensington industrial district are known for its home furnishings and antique warehouse offerings but also includes some auto related services and municipal uses.

- b. *Conditions Causing Change:* Community's interest in creating a Town Center environment by enhancing TOD adjacent to existing MARC train station. Mostly policy driven, with some market support.
- c. *Policy and Regulations:* The approved and adopted May 2012 Kensington Sector Plan (updated the 1978 Sector Plan) establishes:
 - Retention of existing densities to be compatible with Kensington's historic character and building heights
 - Mixed-used zones (Commercial Residential/Town and Commercial Residential / Neighborhood) to allow residential development along with commercial uses adjacent to the MARC Station
 - Preservation of light industrial uses with possible enhancements by creating four District Areas (i.e. Craft / Service District)
- d. *Land Use Transition Process:* Light industrial auto and storage related uses have been replaced over time into concentrations of home furnishings, services and antique warehouses. This area is further away from the MARC Station (Howard Avenue west of Connecticut Avenue) and is the only remaining pure industrial area in Kensington. It also happens to be almost completely built out (i.e. no vacant or underdeveloped sites). Closer to the MARC station, the land use transition process is being facilitated by rezoning from a commercial district to a mixed-use Town Center district (to include residential).
- e. *Adaptive Reuse of Buildings:* There is a limited inventory of non-historic buildings with adaptive reuse potential. In addition, without added density incentives, adaptive reuse may not be financially feasible.
- f. *Impact on Existing Industrial Businesses:* None noted to date.
- g. *Does it Matter?* Industrial district preserved. With no added density incentives to provide redevelopment economic relief, no market changes have been evidenced elsewhere in Kensington.

Twinbrook Parkway and Parklawn Drive, Rockville, Maryland

- a. *Current Development and Uses:* Residential, residential mixed-use projects and office developments are either under construction or recently delivered. Existing industrial uses include auto related, furniture, upholstery, carpets, self storage, fitness, supplies and more. Not unlike the U.S. Army's Forest Glen Annex neighborhood anchor, Twinbrook has the security heavy Department of Health and Human Services headquarters.
- b. *Conditions Causing Change:* There are three primary contributing factors:
 - Zoning change allowing more uses and increased densities
 - TOD private sector market interest
 - Access off major road and proximity to transit
- c. *Policy and Regulations:* The approved and adopted January 2009 Twinbrook Sector Plan updated the 1992 plan and establishes:
 - A Transit Mixed Use (TMX-2) Zone to facilitate mixed-use development in the Metro Core Area (west of Twinbrook Parkway proximate to the Metrorail station) and the Technology

Employment Area (east of Twinbrook Parkway along Fishers Lane and Parklawn Drive). Portions of these areas were previously zoned light industrial (I-1) and were not preserved.

- Amends but preserves most of the I-4 Zone (Washington and Wilkins Avenues) in Transit Station Development Areas (TSDA) to facilitate an urban environment, with standards appropriate to a transit-accessible area of light industrial uses (same 1.0 FAR but lot size and dimension waivers allows parking waivers in the TSDA and accessory residential allowed with Planning Board approval).
- d. *Land Use Transition Process:* The 1992 sector plan changed the light industrial zones (I-1) to heavy industrial (I-4) to limit office encroachment in industrial zones. The updated 2009 sector plan change in zoning, including a reduction in industrial zoned land, has spurred redevelopment in the Metro Core Area and Technology Employment Area.
- e. *Adaptive Reuse of Buildings:* Given the 5.0+ FAR of the Parklawn Building that was grandfathered in (cap of 2.0 FAR in the TMX-2 zone), the building was a candidate for reuse. Other sites have been redeveloped in their entirety.
- f. *Impact on Existing Industrial Businesses:* Loss of industrial businesses previously in the Metro Core Area and the Technology Core Area.
- g. *Does it Matter?* An estimated 50 percent of the County's 110 industrially zoned acres were preserved. The Twinbrook Metrorail Station, opened over 30 years ago in 1984, did not lead to significant immediate neighborhood changes until the 2009 plan rezoning (though nearby land use evolved over this period due in part to the transit connection).

Westbard Planning Area, Bethesda, Maryland

- a. *Current Development and Uses:* New high-end residential construction is underway sandwiched between park space and industrial uses off Little Falls Parkway. Industrial uses comprise auto related, catering, fitness / ballroom, self-storage and more.
- b. *Conditions Causing Change:* Community interests and market pressures. In 2013 and 2014, a developer (Equity One), bought multiple properties in anticipation of redeveloping the Westbard Shopping Center area. Related community outreach was conducted last year. Although this is not a transit location, River Road with proximity to the Beltway is a market driver.
- c. *Policy and Regulations:* The Westbard Sector Plan as of August 2014 is undergoing an update. This sector plan has not been updated in over 30 years, dating back to 1982. The primary themes of the concept framework for the Westbard Sector plan focus on enhanced infrastructure, civic space, prospect for new schools, more residential and amenities and industrial preservation.
- d. *Land Use Transition Process:* Most of the commercial properties in Westbard were developed over 50 years ago and are in need of either reinvestment or redevelopment. The land use transition process will primarily be guided by the updated Westbard Sector Plan, which addresses zoning, uses, infrastructure, etc.
- e. *Adaptive Reuse of Buildings:* Not likely since the plan is contemplating creating a town center environment with new infrastructure.
- f. *Impact on Existing Industrial Businesses:* Some existing industrial businesses may be displaced in an effort to consolidate industrial uses to reduce compatibility issues and isolate other possible impacts.

- g. *Does it Matter?* Higher land values put additional pressure on redevelopment which, absent proactive policies, could result in conversion of industrial space as the Westbard submarket continues to attract investment.

Four Mile Run Drive / I-395, Arlington, Virginia

- a. *Current Development and Uses:* Gradual development activity is being observed in the area. Existing uses comprise concentrated service commercial uses along Four Mile Run Drive and some industrial at the end of Four Mile Run Drive abutting I-395 (e.g. concrete plant and self storage).
- b. *Conditions Causing Change:* There are four noted factors:
- Market pressures evidenced by investments in adjacent Shirlington Village and the Nauck revitalization area in addition to a proposed environmental study of the Jennie Dean Park.
 - Excellent access from I-395 is a market driver.
 - Some transit impact with the opening of the Bus Transfer Station in Shirlington Village and the bike trail connection under I-395.
 - Needed municipal uses (approximately 8.4 acres).
- c. *Policy and Regulations:* The Shirlington Crescent –Four Mile Run Area Plan is being initiated in 2015. Pre-planning concepts include:
- Infrastructure enhancements (Arlington’s “Complete Streets”).
 - Industrial uses (as opposed to current service commercial uses) do not need to be maintained from an economic development standpoint (may not apply to an existing concrete plant).
 - Heavy public service uses need to be retained.
 - Interest in a cultural or “maker” driven Creative Industries District.
 - Expanded park.
- d. *Land Use Transition Process:* Premature to discuss.
- e. *Adaptive Reuse of Buildings:* Plan is being updated in 2015.
- f. *Impact on Existing Industrial Businesses:* Pre-planning ideas suggest some industrial space displacement may be considered adjacent to Nauck Village Center. There is interest in preserving important area service commercial uses. Of the 95 acres within the study area, likely more than 75 percent of the industrial and service commercial space will be preserved.
- g. *Does it Matter?* Noted preservation of a specific type of industrial use designated as service commercial uses.

Eisenhower Avenue West, Alexandria, Virginia

- a. *Current Development and Uses:* There are two residential projects totaling 950 units (Landmark Gateway and Cameron Park) and one office project with 1.0+ million square feet that have approved site plans within the Eisenhower Avenue West Sector Plan. These plans are adjacent to nearby existing industrial uses that comprise auto-related services, self-storage, Fed Ex, UPS, fitness and more.

- b. *Conditions Causing Change:* Market pressures include nearby regional redevelopment activity. Multiple transit pressures include the Van Dorn Metrorail Station within a half mile and proximity to the Capital Beltway.
- c. *Policy and Regulations:* The Eisenhower West Small Area Plan was launched in mid-2014 and is in the final concept plan phase. Objectives of the proposed concept plan comprise:
 - High density within a quarter mile of Metrorail (15 to 20 story buildings); medium density between a quarter and a half mile (10 to 15 story buildings); and medium density beyond a half mile (5 to 10 story buildings).
 - Maintaining and promoting economic development and employment opportunities by capitalizing on proximate transit accessibility and large land holdings.
 - Creating a mixed-use environment in which uses co-exist with long-term industrial uses.
 - Mixed-use developments allowing for vertical integration of residential (mixed-income) above industrial (flex space with high-tech, design, innovation, culinary and/or cultural users).
- d. *Land Use Transition Process:* Entire area is undergoing redevelopment transitioning.
- e. *Adaptive Reuse of Buildings:* Within the Eisenhower West Sector Plan, the 600,000+ square foot Eisenhower office building underwent a \$60 million overhaul. Building was the former headquarters for the Army Material Command from 1973 to 2005 when they relocated to Ft. Belvoir. Building is currently vacant.
- f. *Impact on Existing Industrial Businesses:* The Sector Plan does not appear to preserve the majority of existing industrial space but promotes new mixed-use projects with flex space. Existing industrial uses are viable businesses and will continue to function as such until higher density redevelopment thresholds can be met (building off critical mass that may soon be encroaching).
- g. *Does it Matter?* Preservation is not likely needed for larger market entrenched users. Adjacent redevelopment projects at superior locations creating market competition. Uses co-exist including retention of municipal sites and utility plant operations.

Although an investigation of possibly comparable urban industrial areas in the District of Columbia was initiated as part of the subject study, a lack of parallel environments and focused policy practices rendered profiling these examples less informative relative to Brookville Road. Nonetheless, interesting initiatives in the District include policy recommendations such as dedicating a marketing / branding coordinator, providing technical assistance and neighborhood relations, improving the environmental performance of industrial areas; and creating implementing buffer strategies to enhance transition areas.

APPENDIX C

Demographic Data



Demographic and Income Profile

Brookville Rd Trade Area
Area: 1.36 square miles

Latitude: 39.00344220
Longitude: -77.0534970

Summary	Census 2010	2014	2019
Population	6,789	7,122	7,602
Households	2,450	2,566	2,737
Families	1,611	1,676	1,779
Average Household Size	2.73	2.74	2.74
Owner Occupied Housing Units	1,107	1,088	1,147
Renter Occupied Housing Units	1,343	1,477	1,591
Median Age	34.8	34.9	34.7
Trends: 2014 - 2019 Annual Rate	Area	State	National
Population	1.31%	0.72%	0.73%
Households	1.30%	0.71%	0.75%
Families	1.20%	0.60%	0.66%
Owner HHs	1.06%	0.75%	0.69%
Median Household Income	2.95%	2.91%	2.74%

Households by Income	2014		2019	
	Number	Percent	Number	Percent
<\$15,000	232	9.0%	216	7.9%
\$15,000 - \$24,999	112	4.4%	90	3.3%
\$25,000 - \$34,999	216	8.4%	157	5.7%
\$35,000 - \$49,999	309	12.0%	288	10.5%
\$50,000 - \$74,999	485	18.9%	489	17.9%
\$75,000 - \$99,999	341	13.3%	429	15.7%
\$100,000 - \$149,999	475	18.5%	551	20.1%
\$150,000 - \$199,999	185	7.2%	240	8.8%
\$200,000+	211	8.2%	278	10.2%
Median Household Income	\$70,029		\$80,985	
Average Household Income	\$93,676		\$107,486	
Per Capita Income	\$34,407		\$39,445	

Population by Age	Census 2010		2014		2019	
	Number	Percent	Number	Percent	Number	Percent
0 - 4	534	7.9%	514	7.2%	534	7.0%
5 - 9	409	6.0%	491	6.9%	490	6.4%
10 - 14	387	5.7%	410	5.8%	476	6.3%
15 - 19	399	5.9%	397	5.6%	401	5.3%
20 - 24	491	7.2%	532	7.5%	530	7.0%
25 - 34	1,193	17.6%	1,227	17.2%	1,411	18.6%
35 - 44	1,095	16.1%	1,071	15.0%	1,037	13.6%
45 - 54	950	14.0%	977	13.7%	964	12.7%
55 - 64	733	10.8%	803	11.3%	864	11.4%
65 - 74	318	4.7%	404	5.7%	545	7.2%
75 - 84	183	2.7%	195	2.7%	234	3.1%
85+	99	1.5%	102	1.4%	116	1.5%

Race and Ethnicity	Census 2010		2014		2019	
	Number	Percent	Number	Percent	Number	Percent
White Alone	3,233	47.6%	3,179	44.6%	3,146	41.4%
Black Alone	1,879	27.7%	2,033	28.5%	2,227	29.3%
American Indian Alone	28	0.4%	31	0.4%	36	0.5%
Asian Alone	474	7.0%	508	7.1%	551	7.2%
Pacific Islander Alone	2	0.0%	2	0.0%	2	0.0%
Some Other Race Alone	879	12.9%	1,040	14.6%	1,270	16.7%
Two or More Races	295	4.3%	328	4.6%	370	4.9%
Hispanic Origin (Any Race)	1,704	25.1%	2,005	28.2%	2,436	32.0%

Data Note: Income is expressed in current dollars.

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2014 and 2019.



Demographic and Income Profile

Brookville Rings 2
 8821 Brookville Rd, Silver Spring, Maryland, 20910
 Ring: 0.5 mile radius

Latitude: 39.00075
 Longitude: -77.05385

Summary	Census 2010	2014	2019
Population	3,866	4,071	4,360
Households	1,350	1,421	1,524
Families	903	944	1,007
Average Household Size	2.82	2.82	2.82
Owner Occupied Housing Units	555	539	569
Renter Occupied Housing Units	795	882	955
Median Age	35.1	35.2	34.7
Trends: 2014 - 2019 Annual Rate	Area	State	National
Population	1.38%	0.72%	0.73%
Households	1.41%	0.71%	0.75%
Families	1.30%	0.60%	0.66%
Owner HHs	1.09%	0.75%	0.69%
Median Household Income	3.10%	2.91%	2.74%

Households by Income	2014		2019	
	Number	Percent	Number	Percent
<\$15,000	135	9.5%	128	8.4%
\$15,000 - \$24,999	62	4.4%	50	3.3%
\$25,000 - \$34,999	130	9.1%	95	6.2%
\$35,000 - \$49,999	163	11.5%	153	10.0%
\$50,000 - \$74,999	289	20.3%	292	19.2%
\$75,000 - \$99,999	204	14.4%	255	16.7%
\$100,000 - \$149,999	263	18.5%	317	20.8%
\$150,000 - \$199,999	82	5.8%	113	7.4%
\$200,000+	94	6.6%	122	8.0%
Median Household Income	\$67,200		\$78,293	
Average Household Income	\$87,791		\$100,103	
Per Capita Income	\$32,201		\$36,820	

Population by Age	Census 2010		2014		2019	
	Number	Percent	Number	Percent	Number	Percent
0 - 4	304	7.9%	293	7.2%	304	7.0%
5 - 9	237	6.1%	280	6.9%	276	6.3%
10 - 14	231	6.0%	240	5.9%	268	6.1%
15 - 19	239	6.2%	239	5.9%	239	5.5%
20 - 24	267	6.9%	312	7.7%	308	7.1%
25 - 34	646	16.7%	661	16.2%	808	18.5%
35 - 44	631	16.3%	614	15.1%	584	13.4%
45 - 54	551	14.3%	579	14.2%	561	12.9%
55 - 64	404	10.5%	445	10.9%	499	11.4%
65 - 74	181	4.7%	229	5.6%	306	7.0%
75 - 84	110	2.8%	116	2.8%	137	3.1%
85+	64	1.7%	64	1.6%	71	1.6%

Race and Ethnicity	Census 2010		2014		2019	
	Number	Percent	Number	Percent	Number	Percent
White Alone	1,744	45.1%	1,717	42.2%	1,700	39.0%
Black Alone	1,104	28.6%	1,195	29.3%	1,308	30.0%
American Indian Alone	18	0.5%	20	0.5%	23	0.5%
Asian Alone	280	7.2%	300	7.4%	324	7.4%
Pacific Islander Alone	1	0.0%	1	0.0%	1	0.0%
Some Other Race Alone	549	14.2%	650	16.0%	792	18.2%
Two or More Races	170	4.4%	189	4.6%	212	4.9%
Hispanic Origin (Any Race)	1,046	27.1%	1,230	30.2%	1,490	34.2%

Data Note: Income is expressed in current dollars.

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2014 and 2019.



Demographic and Income Profile

Brookville Rings 2
 8821 Brookville Rd, Silver Spring, Maryland, 20910
 Ring: 1 mile radius

Latitude: 39.00075
 Longitude: -77.05385

Summary	Census 2010	2014	2019
Population	17,842	18,485	19,497
Households	7,072	7,309	7,698
Families	4,157	4,259	4,455
Average Household Size	2.49	2.49	2.50
Owner Occupied Housing Units	3,722	3,710	3,884
Renter Occupied Housing Units	3,350	3,599	3,814
Median Age	36.6	36.8	36.5
Trends: 2014 - 2019 Annual Rate	Area	State	National
Population	1.07%	0.72%	0.73%
Households	1.04%	0.71%	0.75%
Families	0.90%	0.60%	0.66%
Owner HHs	0.92%	0.75%	0.69%
Median Household Income	2.92%	2.91%	2.74%

Households by Income	2014		2019	
	Number	Percent	Number	Percent
<\$15,000	520	7.1%	475	6.2%
\$15,000 - \$24,999	321	4.4%	252	3.3%
\$25,000 - \$34,999	444	6.1%	314	4.1%
\$35,000 - \$49,999	911	12.5%	824	10.7%
\$50,000 - \$74,999	1,194	16.3%	1,174	15.3%
\$75,000 - \$99,999	862	11.8%	1,010	13.1%
\$100,000 - \$149,999	1,362	18.6%	1,417	18.4%
\$150,000 - \$199,999	661	9.0%	844	11.0%
\$200,000+	1,034	14.1%	1,387	18.0%
Median Household Income	\$81,322		\$93,896	
Average Household Income	\$113,513		\$133,627	
Per Capita Income	\$45,731		\$53,782	

Population by Age	Census 2010		2014		2019	
	Number	Percent	Number	Percent	Number	Percent
0 - 4	1,191	6.7%	1,141	6.2%	1,192	6.1%
5 - 9	1,017	5.7%	1,141	6.2%	1,158	5.9%
10 - 14	933	5.2%	1,034	5.6%	1,175	6.0%
15 - 19	906	5.1%	928	5.0%	966	5.0%
20 - 24	1,281	7.2%	1,249	6.8%	1,328	6.8%
25 - 34	3,163	17.7%	3,302	17.9%	3,512	18.0%
35 - 44	2,627	14.7%	2,555	13.8%	2,554	13.1%
45 - 54	2,478	13.9%	2,416	13.1%	2,366	12.1%
55 - 64	2,225	12.5%	2,328	12.6%	2,367	12.1%
65 - 74	1,001	5.6%	1,327	7.2%	1,707	8.8%
75 - 84	636	3.6%	658	3.6%	738	3.8%
85+	385	2.2%	406	2.2%	434	2.2%

Race and Ethnicity	Census 2010		2014		2019	
	Number	Percent	Number	Percent	Number	Percent
White Alone	10,291	57.7%	10,147	54.9%	10,072	51.7%
Black Alone	4,387	24.6%	4,755	25.7%	5,255	27.0%
American Indian Alone	58	0.3%	66	0.4%	76	0.4%
Asian Alone	1,156	6.5%	1,252	6.8%	1,387	7.1%
Pacific Islander Alone	5	0.0%	5	0.0%	5	0.0%
Some Other Race Alone	1,243	7.0%	1,470	8.0%	1,800	9.2%
Two or More Races	703	3.9%	790	4.3%	902	4.6%
Hispanic Origin (Any Race)	2,699	15.1%	3,192	17.3%	3,918	20.1%

Data Note: Income is expressed in current dollars.

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2014 and 2019.



Demographic and Income Profile

Brookville Rings 2
 8821 Brookville Rd, Silver Spring, Maryland, 20910
 Ring: 2 mile radius

Latitude: 39.00075
 Longitude: -77.05385

Summary	Census 2010	2014	2019
Population	68,085	71,106	75,378
Households	29,104	30,540	32,474
Families	16,433	16,887	17,686
Average Household Size	2.31	2.30	2.30
Owner Occupied Housing Units	16,104	16,136	16,925
Renter Occupied Housing Units	13,000	14,404	15,549
Median Age	39.1	39.6	39.5
Trends: 2014 - 2019 Annual Rate	Area	State	National
Population	1.17%	0.72%	0.73%
Households	1.24%	0.71%	0.75%
Families	0.93%	0.60%	0.66%
Owner HHs	0.96%	0.75%	0.69%
Median Household Income	2.66%	2.91%	2.74%

Households by Income	2014		2019	
	Number	Percent	Number	Percent
<\$15,000	2,032	6.7%	1,956	6.0%
\$15,000 - \$24,999	1,322	4.3%	1,057	3.3%
\$25,000 - \$34,999	2,159	7.1%	1,537	4.7%
\$35,000 - \$49,999	3,377	11.1%	3,075	9.5%
\$50,000 - \$74,999	3,869	12.7%	3,793	11.7%
\$75,000 - \$99,999	3,494	11.4%	4,088	12.6%
\$100,000 - \$149,999	5,411	17.7%	5,672	17.5%
\$150,000 - \$199,999	3,047	10.0%	3,813	11.7%
\$200,000+	5,829	19.1%	7,483	23.0%
Median Household Income	\$91,622		\$104,486	
Average Household Income	\$128,007		\$150,594	
Per Capita Income	\$55,056		\$64,952	

Population by Age	Census 2010		2014		2019	
	Number	Percent	Number	Percent	Number	Percent
0 - 4	4,248	6.2%	4,033	5.7%	4,195	5.6%
5 - 9	3,957	5.8%	4,267	6.0%	4,360	5.8%
10 - 14	3,550	5.2%	4,107	5.8%	4,631	6.1%
15 - 19	3,142	4.6%	3,373	4.7%	3,732	5.0%
20 - 24	3,959	5.8%	4,187	5.9%	4,422	5.9%
25 - 34	11,110	16.3%	11,310	15.9%	11,816	15.7%
35 - 44	9,887	14.5%	9,607	13.5%	9,748	12.9%
45 - 54	9,788	14.4%	9,692	13.6%	9,626	12.8%
55 - 64	9,108	13.4%	9,552	13.4%	9,820	13.0%
65 - 74	4,725	6.9%	6,049	8.5%	7,458	9.9%
75 - 84	2,837	4.2%	3,025	4.3%	3,561	4.7%
85+	1,774	2.6%	1,905	2.7%	2,009	2.7%

Race and Ethnicity	Census 2010		2014		2019	
	Number	Percent	Number	Percent	Number	Percent
White Alone	42,400	62.3%	42,477	59.7%	42,835	56.8%
Black Alone	15,226	22.4%	16,670	23.4%	18,524	24.6%
American Indian Alone	213	0.3%	246	0.3%	290	0.4%
Asian Alone	4,355	6.4%	4,834	6.8%	5,472	7.3%
Pacific Islander Alone	20	0.0%	21	0.0%	24	0.0%
Some Other Race Alone	3,232	4.7%	3,846	5.4%	4,740	6.3%
Two or More Races	2,638	3.9%	3,011	4.2%	3,493	4.6%
Hispanic Origin (Any Race)	8,031	11.8%	9,600	13.5%	11,946	15.8%

Data Note: Income is expressed in current dollars.

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2014 and 2019.



Demographic and Income Profile

Montgomery County, MD
 Montgomery County, MD (24031)
 Geography: County

Summary	Census 2010	2014	2019
Population	971,777	1,003,571	1,059,534
Households	357,086	367,499	387,482
Families	244,898	250,012	261,867
Average Household Size	2.70	2.71	2.71
Owner Occupied Housing Units	241,465	242,085	255,416
Renter Occupied Housing Units	115,621	125,414	132,066
Median Age	38.4	39.2	39.6
Trends: 2014 - 2019 Annual Rate	Area	State	National
Population	1.09%	0.72%	0.73%
Households	1.06%	0.71%	0.75%
Families	0.93%	0.60%	0.66%
Owner HHs	1.08%	0.75%	0.69%
Median Household Income	2.18%	2.91%	2.74%

Households by Income	2014		2019	
	Number	Percent	Number	Percent
<\$15,000	19,491	5.3%	17,789	4.6%
\$15,000 - \$24,999	14,792	4.0%	11,415	2.9%
\$25,000 - \$34,999	23,161	6.3%	16,242	4.2%
\$35,000 - \$49,999	35,076	9.5%	31,073	8.0%
\$50,000 - \$74,999	51,319	14.0%	48,613	12.5%
\$75,000 - \$99,999	41,860	11.4%	47,575	12.3%
\$100,000 - \$149,999	76,125	20.7%	77,565	20.0%
\$150,000 - \$199,999	44,658	12.2%	56,693	14.6%
\$200,000+	61,017	16.6%	80,517	20.8%
Median Household Income	\$98,530		\$109,775	
Average Household Income	\$124,504		\$146,358	
Per Capita Income	\$45,753		\$53,715	

Population by Age	Census 2010		2014		2019	
	Number	Percent	Number	Percent	Number	Percent
0 - 4	63,732	6.6%	61,023	6.1%	64,221	6.1%
5 - 9	64,300	6.6%	67,467	6.7%	69,905	6.6%
10 - 14	64,663	6.7%	68,191	6.8%	74,909	7.1%
15 - 19	59,862	6.2%	60,000	6.0%	62,415	5.9%
20 - 24	54,031	5.6%	57,028	5.7%	53,836	5.1%
25 - 34	132,393	13.6%	132,478	13.2%	136,066	12.8%
35 - 44	140,565	14.5%	136,569	13.6%	145,617	13.7%
45 - 54	153,481	15.8%	148,260	14.8%	143,334	13.5%
55 - 64	118,981	12.2%	131,701	13.1%	140,677	13.3%
65 - 74	62,541	6.4%	78,646	7.8%	97,178	9.2%
75 - 84	37,797	3.9%	40,448	4.0%	47,825	4.5%
85+	19,431	2.0%	21,760	2.2%	23,551	2.2%

Race and Ethnicity	Census 2010		2014		2019	
	Number	Percent	Number	Percent	Number	Percent
White Alone	558,358	57.5%	552,985	55.1%	554,127	52.3%
Black Alone	167,315	17.2%	178,519	17.8%	194,984	18.4%
American Indian Alone	3,639	0.4%	4,049	0.4%	4,696	0.4%
Asian Alone	135,451	13.9%	147,167	14.7%	164,666	15.5%
Pacific Islander Alone	522	0.1%	545	0.1%	582	0.1%
Some Other Race Alone	67,847	7.0%	77,499	7.7%	91,977	8.7%
Two or More Races	38,645	4.0%	42,807	4.3%	48,502	4.6%
Hispanic Origin (Any Race)	165,398	17.0%	190,015	18.9%	227,752	21.5%

Data Note: Income is expressed in current dollars.

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2014 and 2019.



Business Summary

Brookville Rings 2
 8821 Brookville Rd, Silver Spring, Maryland, 20910
 Rings: 0.5, 1, 2 mile radii

Latitude: 39.00075
 Longitude: -77.05385

Data for all businesses in area	0.5 miles	1 mile	2 miles
Total Businesses:	335	1,412	7,496
Total Employees:	3,181	8,432	48,594
Total Residential Population:	4,071	18,485	71,106
Employee/Residential Population Ratio:	0.78:1	0.46:1	0.68:1

by SIC Codes	Employees				Employees				Employees			
	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Agriculture & Mining	10	3.0%	93	2.9%	25	1.8%	150	1.8%	66	0.9%	284	0.6%
Construction	30	9.0%	403	12.7%	87	6.2%	839	10.0%	304	4.1%	2,009	4.1%
Manufacturing	12	3.6%	71	2.2%	36	2.5%	213	2.5%	121	1.6%	1,553	3.2%
Transportation	7	2.1%	29	0.9%	25	1.8%	69	0.8%	112	1.5%	655	1.3%
Communication	2	0.6%	1	0.0%	14	1.0%	35	0.4%	93	1.2%	1,321	2.7%
Utility	0	0.0%	0	0.0%	1	0.1%	1	0.0%	3	0.0%	8	0.0%
Wholesale Trade	22	6.6%	134	4.2%	50	3.5%	290	3.4%	163	2.2%	698	1.4%
Retail Trade Summary	33	9.9%	244	7.7%	121	8.6%	990	11.7%	583	7.8%	4,058	8.4%
Home Improvement	3	0.9%	13	0.4%	7	0.5%	40	0.5%	12	0.2%	63	0.1%
General Merchandise Stores	0	0.0%	0	0.0%	0	0.0%	0	0.0%	3	0.0%	38	0.1%
Food Stores	4	1.2%	70	2.2%	14	1.0%	214	2.5%	65	0.9%	819	1.7%
Auto Dealers, Gas Stations, Auto Aftermarket	2	0.6%	30	0.9%	8	0.6%	73	0.9%	31	0.4%	181	0.4%
Apparel & Accessory Stores	2	0.6%	10	0.3%	8	0.6%	27	0.3%	60	0.8%	268	0.6%
Furniture & Home Furnishings	2	0.6%	10	0.3%	10	0.7%	30	0.4%	45	0.6%	202	0.4%
Eating & Drinking Places	4	1.2%	24	0.8%	33	2.3%	380	4.5%	203	2.7%	1,652	3.4%
Miscellaneous Retail	15	4.5%	87	2.7%	41	2.9%	227	2.7%	166	2.2%	836	1.7%
Finance, Insurance, Real Estate Summary	11	3.3%	32	1.0%	59	4.2%	245	2.9%	506	6.8%	2,233	4.6%
Banks, Savings & Lending Institutions	1	0.3%	0	0.0%	4	0.3%	15	0.2%	55	0.7%	290	0.6%
Securities Brokers	0	0.0%	0	0.0%	1	0.1%	2	0.0%	22	0.3%	54	0.1%
Insurance Carriers & Agents	2	0.6%	2	0.1%	3	0.2%	5	0.1%	58	0.8%	321	0.7%
Real Estate, Holding, Other Investment Offices	8	2.4%	31	1.0%	51	3.6%	223	2.6%	371	4.9%	1,569	3.2%
Services Summary	165	49.3%	1,179	37.1%	773	54.7%	4,079	48.4%	4,458	59.5%	26,280	54.1%
Hotels & Lodging	1	0.3%	2	0.1%	2	0.1%	5	0.1%	14	0.2%	509	1.0%
Automotive Services	19	5.7%	116	3.6%	28	2.0%	195	2.3%	98	1.3%	548	1.1%
Motion Pictures & Amusements	6	1.8%	93	2.9%	34	2.4%	276	3.3%	168	2.2%	1,152	2.4%
Health Services	13	3.9%	88	2.8%	71	5.0%	790	9.4%	678	9.0%	4,406	9.1%
Legal Services	4	1.2%	8	0.3%	20	1.4%	45	0.5%	264	3.5%	851	1.8%
Education Institutions & Libraries	9	2.7%	65	2.0%	32	2.3%	358	4.2%	160	2.1%	2,263	4.7%
Other Services	114	34.0%	807	25.4%	584	41.4%	2,410	28.6%	3,076	41.0%	16,552	34.1%
Government	5	1.5%	994	31.2%	15	1.1%	1,512	17.9%	118	1.6%	9,469	19.5%
Unclassified Establishments	38	11.3%	0	0.0%	206	14.6%	8	0.1%	969	12.9%	25	0.1%
Totals	335	100.0%	3,181	100.0%	1,412	100.0%	8,432	100.0%	7,496	100.0%	48,594	100.0%

Source: Copyright 2014 Dun & Bradstreet, Inc. All rights reserved. Esri Total Residential Population forecasts for 2014.

March 12, 2015



Business Summary

Montgomery County, MD
 Montgomery County, MD (24031)
 Geography: County

Data for all businesses in area		Montgomery Count...			
Total Businesses:				86,866	
Total Employees:				549,292	
Total Residential Population:				1,003,571	
Employee/Residential Population Ratio:				0.55:1	
by SIC Codes				Employees	
		Number	Percent	Number	Percent
Agriculture & Mining		1,401	1.6%	6,568	1.2%
Construction		5,215	6.0%	25,363	4.6%
Manufacturing		1,692	1.9%	24,810	4.5%
Transportation		1,476	1.7%	9,362	1.7%
Communication		754	0.9%	6,276	1.1%
Utility		95	0.1%	962	0.2%
Wholesale Trade		2,092	2.4%	10,440	1.9%
Retail Trade Summary		7,256	8.4%	65,227	11.9%
Home Improvement		233	0.3%	1,759	0.3%
General Merchandise Stores		108	0.1%	6,074	1.1%
Food Stores		776	0.9%	11,125	2.0%
Auto Dealers, Gas Stations, Auto Aftermarket		498	0.6%	6,430	1.2%
Apparel & Accessory Stores		626	0.7%	3,797	0.7%
Furniture & Home Furnishings		743	0.9%	3,945	0.7%
Eating & Drinking Places		2,189	2.5%	20,478	3.7%
Miscellaneous Retail		2,083	2.4%	11,619	2.1%
Finance, Insurance, Real Estate Summary		6,838	7.9%	36,650	6.7%
Banks, Savings & Lending Institutions		802	0.9%	6,144	1.1%
Securities Brokers		412	0.5%	3,085	0.6%
Insurance Carriers & Agents		795	0.9%	8,278	1.5%
Real Estate, Holding, Other Investment Offices		4,829	5.6%	19,143	3.5%
Services Summary		46,154	53.1%	263,228	47.9%
Hotels & Lodging		279	0.3%	5,763	1.0%
Automotive Services		1,021	1.2%	5,083	0.9%
Motion Pictures & Amusements		1,803	2.1%	9,858	1.8%
Health Services		6,015	6.9%	49,462	9.0%
Legal Services		1,868	2.2%	6,210	1.1%
Education Institutions & Libraries		1,596	1.8%	31,348	5.7%
Other Services		33,572	38.6%	155,504	28.3%
Government		899	1.0%	100,107	18.2%
Unclassified Establishments		12,994	15.0%	299	0.1%
Totals		86,866	100.0%	549,292	100.0%

Source: Copyright 2014 Dun & Bradstreet, Inc. All rights reserved. Esri Total Residential Population forecasts for 2014.