



Montgomery Village Master Plan: Scope of Work

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Completed: 12/3/14

Description

Montgomery Village Master Plan: Scope of Work

Staff Recommendation:

Approve the proposed Scope of Work



Summary

The Montgomery Village Master Plan will address the 2,435 acres that comprise the Montgomery Village community. This Master Plan effort will be informed by and will build upon the visioning exercises conducted by the Montgomery Village Foundation, which identified several key sites where redevelopment is anticipated or encouraged. In addition, the master plan process will be used to identify a new set of zones to replace the Town Sector Zone in Montgomery Village. This Scope includes the following information:

- Boundary for the Montgomery Village Master Plan;
- Background on Montgomery Village and the Montgomery Village Foundation;
- Planning Framework;
- Purpose and Summary of Plan Issues;
- Town Sector Zone and Development Plan;
- Montgomery Village Today: Community Snapshot; and
- Community Outreach and Plan Schedule.

Introduction

In accordance with the work program established by the County Council, the Planning Department has initiated a Master Plan for Montgomery Village and this Scope of Work describes the proposed boundaries, purpose, outreach strategy, and schedule. The Scope also provides background, context, and a summary of the issues to be addressed.

Montgomery Village is located in the central part of Montgomery County, east of I-270 and north of the City of Gaithersburg (see Figure 1). Within the region, Montgomery Village is about equidistant between Washington, D.C. and Frederick, Maryland. Montgomery Village is roughly bounded by Great Seneca Park on the west, Warfield Road on the north, Goshen Road on the east and Lost Knife Road on the south. Communities surrounding Montgomery Village include Germantown to the west, the Agricultural Reserve to the north, the Montgomery Airpark and Lois Green Conservation Park to the east, and the City of Gaithersburg directly to the south. The boundaries proposed for the Montgomery Village Master Plan (MVMP) are shown on Attachment 1.

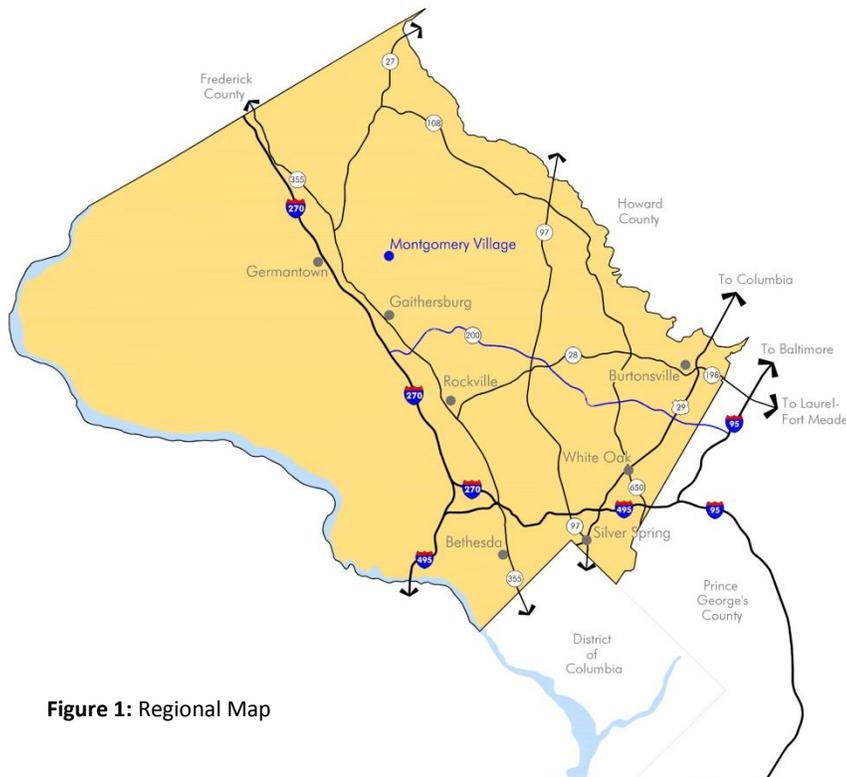


Figure 1: Regional Map

Background

Montgomery Village was developed by the Kettler brothers, whose vision was to create attractive and desirable residential neighborhoods with a range of housing choices and plenty of green space and recreational opportunities. The Kettlers' "new town" was loosely based on the Corridor City concept envisioned in Montgomery County's 1964 *General Plan (On Wedges and Corridors)* for the Physical Development of the Maryland-Washington Region District in Montgomery and Prince George's Counties. The new town movement started in the United

States after World War II and was, in some instances, a response and remedy to overcrowding and congestion in urban areas. “New towns” were synonymous with “planned communities” – towns that were carefully, purposefully planned from inception, usually constructed in previously undeveloped areas, with an effort toward being self-sufficient. In addition to Montgomery Village, the Washington region is home to two of the most famous planned communities in the country – Reston, Virginia and Columbia, Maryland.

In the 1960s, the Kettlers started buying farmland in the Gaithersburg area and assembled over 1,500 acres. New subdivisions in the sprawling “village,” were named for the former farms: Walker, Thomas, Brothers Mill, French, Patton, Fulks, and Wilson (see Figures 2 and 3). The Kettlers’ community offered modestly-priced single-family homes, townhomes, and apartments with convenient local shopping, a golf course, parks, swimming pools, and several lakes. Montgomery Village Avenue was designed as the north-south “main street” with residential streets branching off to the east and west. Lake Whetstone, created by a dam, is situated along the eastern edge of lower Montgomery Village Avenue and is a prominent landmark that provides a serene vista. The Kettlers felt so strongly about creating views of the lake, they elevated the southbound lanes of Montgomery Village Avenue so drivers, walkers, and bikers going in both directions could take in the scenery.

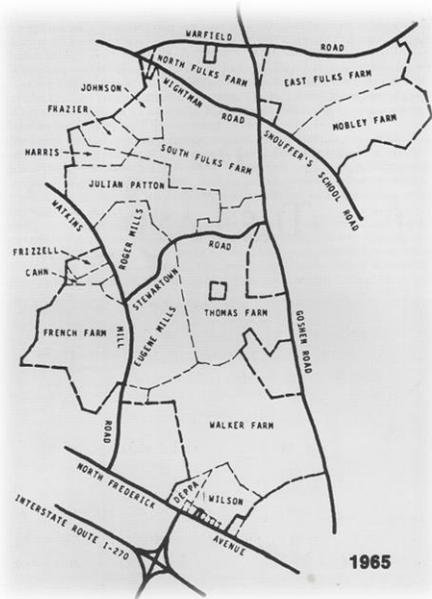


Figure 2: The Lands of Montgomery Village

Photo Credit: William N. Hurley, Jr., Montgomery Village: A New Town



Figure 3: Future Site of Montgomery Village, c. 1964

Source: Montgomery Village Historical Book Committee

Montgomery Village Foundation

In 1966, the Montgomery Village Foundation (MVF) was created as a nonprofit organization whose mission was to promote the health, safety, and welfare of the residents of Montgomery Village. The MVF is a 501(c)(4) entity with Articles of Incorporation that set forth the activities in which the Foundation can be involved on behalf of all residents, essentially functioning as an unincorporated township. There are a number of homeowners associations in the Village, some of which are managed by the MVF and others that are independent from the organization. The MVF also has authority granted to the organization through the Declaration of Covenants that are included as part of the deed to all residential property within the Village and to associated homeowners associations, condominium associations, and apartment complexes. This authority includes collection of assessments to meet the costs of maintaining the parks, trails, swimming pools, and other facilities owned by the MVF, as well as other services it provides for residents.

Planning Framework

Montgomery County's 1964 General Plan designated several corridor cities along the I-270 Corridor -- Rockville, Gaithersburg, Germantown, Clarksburg -- and all were to be served by transit with station locations that would become the focal points for development. Each corridor city would be relatively self-sufficient, with employment, a range of housing choices, and supportive community services.

The 1993 General Plan Refinement divided the County into four geographic areas: the relatively intensively developed down-County urban ring, the I-270 Corridor, the moderately dense suburban communities, and the low-density residential and rural agricultural wedges. Montgomery Village is within the General Plan's I-270 Corridor area and its northern boundary is adjacent to the Agricultural Reserve.

Montgomery Village was included within the boundaries of two previous master plans -- the 1971 *Gaithersburg Vicinity Master Plan* and the 1985 *Gaithersburg Vicinity Master Plan*. The boundaries for these master plans were nearly identical and covered about 25 square miles of land surrounding the City of Gaithersburg and the Town of Washington Grove, with the City of Rockville bordering the Plan to the southeast. The 1971 *Gaithersburg Vicinity Master Plan* relied on the corridor city concept to establish a development pattern for Gaithersburg, including a central core, residential areas, including a lower density residential fringe, and a transportation system.

With the exception of a reference to open space and potential school sites, the 1985 *Gaithersburg Vicinity Master Plan* contained no narrative or background about Montgomery Village. The 1985 Plan limited its focus to three areas -- Shady Grove West (i.e., the Life Sciences Center and environs), the Airpark, and Smokey Glen -- that were considered to have meaningful opportunities to influence physical growth and future development through the master plan process. For all other areas, the 1985 Plan stated that the recommendations of the 1971 Gaithersburg Master Plan would be continued.

Montgomery Village has not been part of a master plan since the 1985 Gaithersburg Plan and it has never been the subject of a discrete County master plan. The Montgomery Village Foundation has been anticipating a master plan update for its community since the mid-2000s, when the Planning Department initiated the Gaithersburg Master Plan, which originally included the Village. Soon after the Gaithersburg Master Plan commenced, it became clear that the area was too large; with land on both sides of I-270, and distinct and unique issues faced by the east and west, the Department recommended (and the County Council agreed) that the area be divided into two smaller plan areas and that the plans be updated sequentially, Gaithersburg West followed by Gaithersburg East. Gaithersburg West became the *Great Seneca Science Corridor Master Plan*, which was approved and adopted in 2010. Gaithersburg East was to include Montgomery Village and all of the areas from the 1985 Gaithersburg Plan that had not been part of previous plan updates.

In spring 2014, the County Council programmed a master plan effort for Montgomery Village to commence in the fall of 2014. A subsequent master plan effort for the remaining portions of Gaithersburg East is in the Planning Department's long range planning program.

Purpose of the Plan

The County Council directed the Planning Department to expedite work on a master plan for Montgomery Village to do two things: 1) address potential redevelopment proposals in Montgomery Village and 2) review the zoning in the Village holistically before the prohibition on rezoning the T-S zoned property expires in 2015. Montgomery Village is in a unique situation with regard to its zoning. As described in more detail below, the Town Sector Zone was originally created for Montgomery Village. As a result of decisions made by the Planning Board and the County Council when the new Zoning Ordinance was adopted in 2014, the Town Sector Zone is not to be used going forward, so it must be replaced with new zones as part of this Master Plan.

Issues to be Addressed

1. Potential Redevelopment

While awaiting the initiation of the Planning Department's Master Plan, the MVF hired a consultant and undertook its own planning exercise, "Montgomery Village Vision 2030." Through a series of charrettes in 2011, with substantive community engagement by Village residents, this visioning exercise focused on four sites:

- the 58-acre Village Center, the area's largest commercial center, bounded by Montgomery Village Avenue, Stedwick Road, Watkins Mill Road, and Clubhouse Road;
- the 7-acre "Professional Center" – a townhouse-condominium office development across Montgomery Village Avenue from the Village Center;
- the 3-acre "Gateway" site on the northeast corner of Montgomery Village Avenue and Lost Knife Road that is currently vacant and adjacent to a day care center; and
- the 147-acre former golf course.

The Montgomery Village Golf Club, straddling both sides of Montgomery Village Avenue, struggled to maintain membership and viability for a number of years. Unlike the rest of the Village's open spaces, the golf course has always been privately owned. In 2005, the IDI Group Companies considered purchasing the golf course to create a residential community for seniors, modeled after Leisure World. IDI decided not to pursue the golf course purchase. In March 2013, the owner of the golf course sold the property to a development company, Monument Realty, which purchased the site with intentions to redevelop it into a new residential neighborhood. Monument Realty has held a number of meetings to review, discuss, and refine their plans for redevelopment of the golf course, including meetings with residents adjacent to the former golf course, with the MVF, and with area-wide residents.

Staff intends to utilize the preliminary planning work that has taken place through the MVF's Vision 2030 exercise. The MVMP will focus on the sites where redevelopment and/or revitalization is planned, anticipated, or desired, as previously identified through Vision 2030 or through additional outreach and staff efforts during the planning process. Monument Realty's

proposed redevelopment of the golf course, and the outreach that has been conducted thus far by the developer, will also be taken into consideration.

2. Transportation Infrastructure

At the Council's direction, the MVMP will not address the alternatives that are being considered for M-83 by the Department of Transportation that will also be reviewed by the Army Corps of Engineers. Final decisions about M-83 are not likely to be resolved within the expedited timeframe of the MVMP. Staff will, however, analyze the impacts of proposed redevelopment in the Village on the transportation network. This analysis will include use of the Department's regional model to assess the land use/transportation balance as well as the local area model to assess forecasted congestion at local intersections. The alignment for M-83 that is in the *Master Plan of Highways within Montgomery County*, the 1985 *Gaithersburg Vicinity Master Plan*, and the 1989 *Germantown Master Plan* will be assumed as an element of the regional model network. In addition, staff will identify and evaluate opportunities to improve connectivity, including bicycle and pedestrian paths within the community and between surrounding areas.

3. Zoning

Town Sector Zone and the Development Plan

The development of Montgomery Village was based on "new town" principles, which were intended to establish a level of self-sufficiency for the Village. To assist in the creation of the new town, a new zone - the Town Sector Zone (T-S Zone) – was created and approved by local map amendment by the County Council in 1965. The T-S Zone was considered one of the more complex "floating" zones that could be applied by local map amendment. The complexity had to do with the required size of the area (an application for the T-S Zone had to include a minimum of 1,500 acres) and the possibility that a mix of uses could occur on a single site, which was an unusual idea at the time. The T-S Zone was different from conventional zoning in that it provided more flexibility and did not have the standard regulations regarding height, bulk, density, and uses. The T-S Zone also established residential density at a maximum of 15 persons per acre based on the total area within the T-S Zone. Density was to be calculated by housing types, not the actual census, with an average of three persons per dwelling unit. Applications for piecemeal rezoning were prohibited for 50 years--a control which expires in 2015. The expiration of this prohibition and the fact that the Village has nearly reached its population capacity are key reasons that this Master Plan is timely.

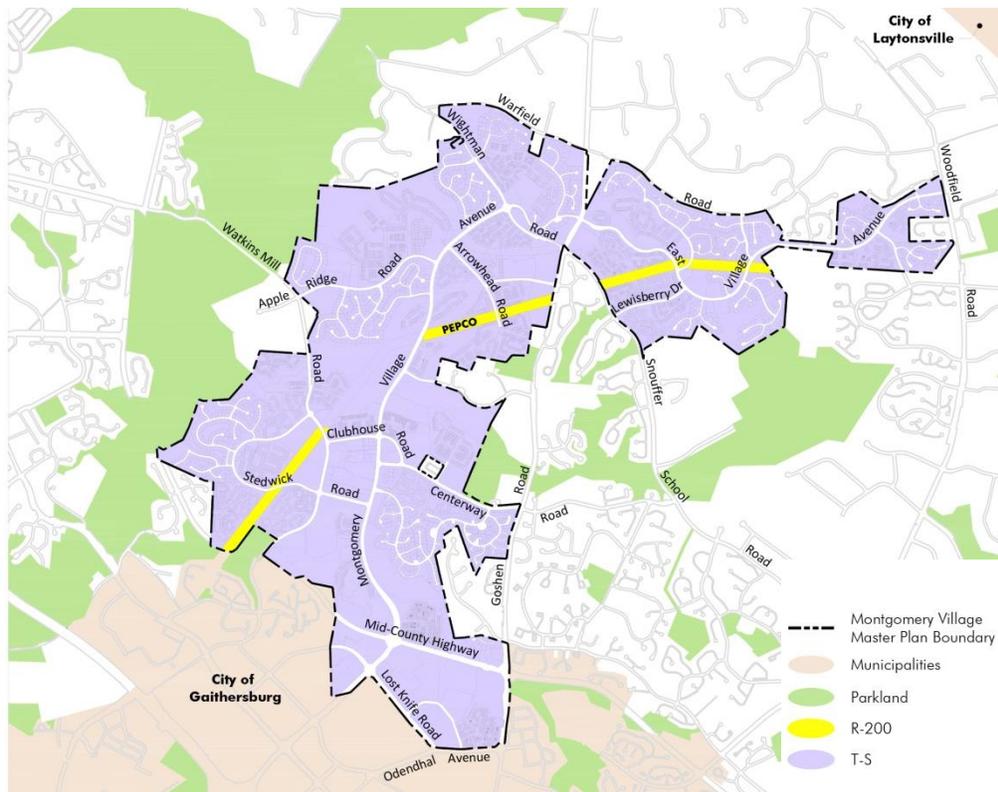


Figure 4: Montgomery Village Plan Zoning

Land use guidance for Montgomery Village was provided by the Development Plan, which was required to be submitted and approved with the original T-S zoning application. The Development Plan identified the locations and densities for residential and commercial uses, the road network, as well as sites for public schools and open spaces, trails, and bike paths. The entire 2,435-acre Montgomery Village area is within the Town Sector Zone (see Figure 4) and is covered by the Development Plan, which has been amended during the regulatory process as projects have been approved. The PEPCO right-of-way that traverses Montgomery Village is zoned R-200.

Adoption of the New County Zoning Code

Montgomery County adopted a new zoning ordinance that went into effect on October 30, 2014. The T-S Zone is currently included in the final section of the new ordinance, Article 59-8 “Zones Retained from Previous Ordinance,” which states the following: *The zones in Article 59-8 were applied by Local Map Amendment before this Zoning Ordinance was adopted. These zones may appear on the digital zoning map, but they cannot be requested by a property owner under a Local Map Amendment or applied to any additional property under a Sectional Map Amendment adopted after October 30, 2014.* (Section 8.1.1) In other words, it was decided that the zones included in Article 59-8 should be phased out and replaced. When master plans that contain any of the zones in Article 59-8 are updated, the revised master plans will replace these zones and recommend new ones.

It is, therefore, the task and responsibility of the MVMP effort to devise new zoning categories for the 2,435 acres that are currently within a single zone, the T-S Zone. This will be a challenging exercise and one that is unusual for a master plan, since plans typically confirm much of the existing zoning, particularly for residential areas. In general, staff’s approach will be to recommend zones that reflect the land uses and densities that are currently developed as closely as possible. For example, the large portions of the Village that are now exclusively residential could be recommended for single-family, townhouse, or multi-family zones that reflect those existing housing types (see Figure 5). Where redevelopment is anticipated, zones may be recommended to allow a mix of uses that could encourage revitalization. At the end of the process, once the Master Plan is approved by the County Council and adopted by the Planning Commission, the zoning recommended by the Plan will be implemented through a Sectional Map Amendment (SMA) that will also be subject to a public hearing.

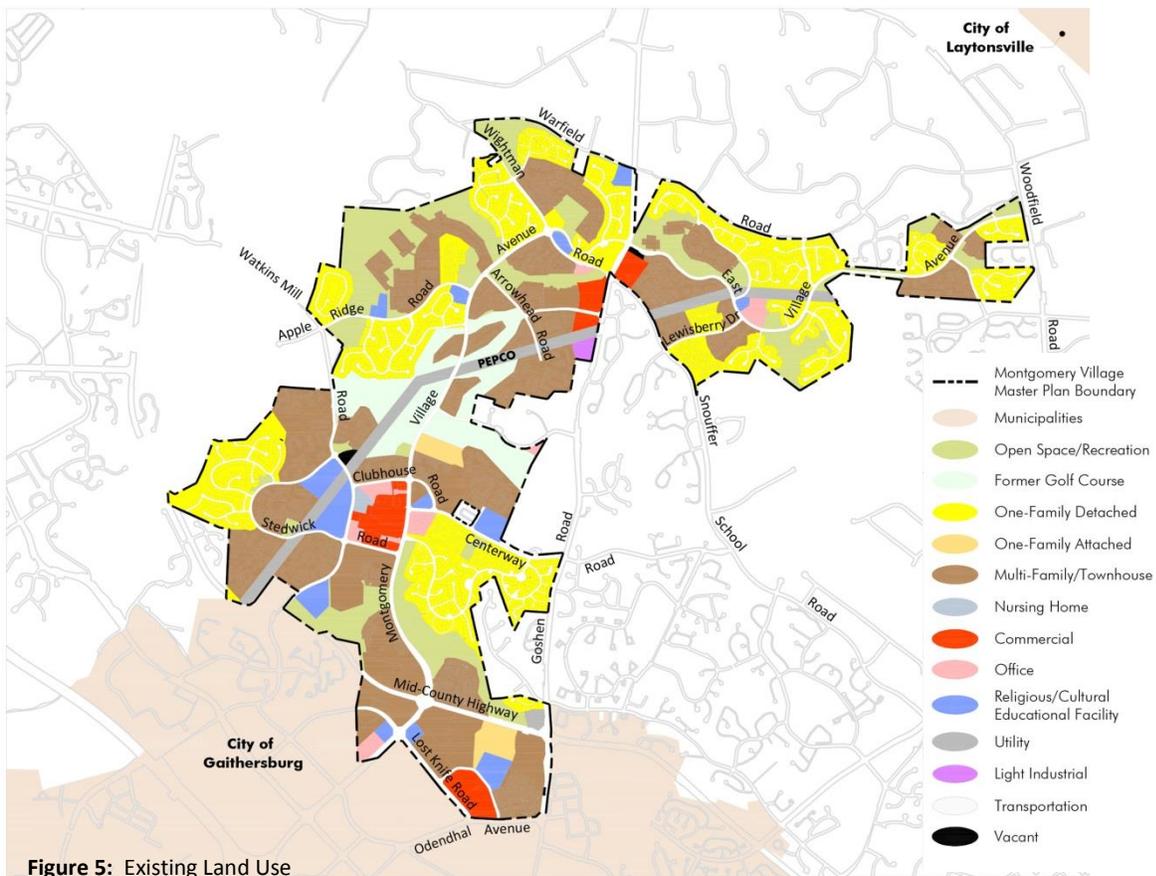


Figure 5: Existing Land Use

The Development Plan for Montgomery Village, which accompanied the original T-S Zone in the Village, will no longer be in effect when the new zoning categories are implemented through the SMA. The new Zoning Ordinance provides the following direction on this matter: *Any development allowed on property subject to the binding elements of a District Council approved development plan or schematic development plan on October 30, 2014, must satisfy those*

binding elements until the property is: a. subject to a Sectional Map Amendment that implements a master plan approved after October 30, 2014... (Division 7.7.1.B.5.)

Montgomery Village Today: Community Snapshot

Montgomery Village has an established sense of character, identity, and openness. In a large jurisdiction like Montgomery County, the small town atmosphere of Montgomery Village fosters community connectedness and residents feel they are part of a unique enclave. There is a strong sense of community pride and belonging, with a variety of services available to the 34,000 residents. At the same time, Montgomery Village is aging – in 2015, the planned community will be 50 years old – so this is a good time to take a comprehensive look at the future of the Village.

The majority of the Village was developed between 1965 –1980 and there has been relatively little development in recent years. A residential project, the 205-unit Rothbury Apartments, was completed in 2011. The Montgomery Village Plaza/Off-Price Center was redeveloped by developer JBG in 2009 with a Trader Joe’s, Marshall’s and Crisp & Juicy. No major new

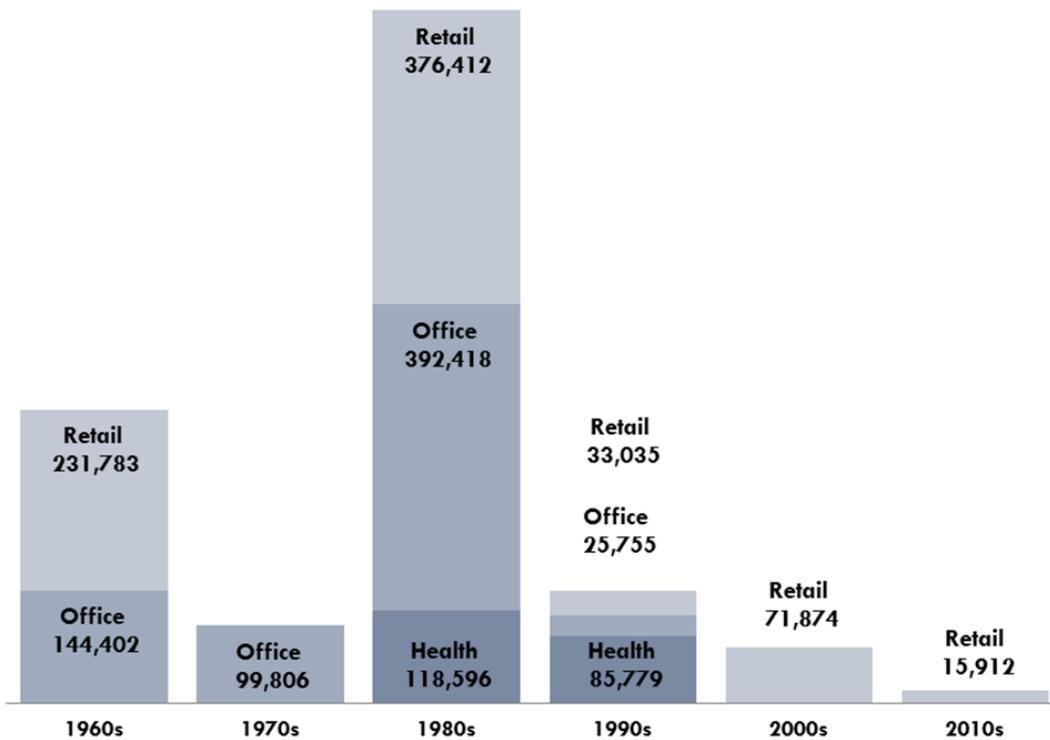


Figure 6: Montgomery Village Commercial Square Footage 1960s – 2010s

residential developments have been approved in recent years, primarily due to the limits on residential density in the T-S Zone.

The mid-County area surrounding Montgomery Village has seen intensive development over several decades. Montgomery Village residents have a variety of retail shopping opportunities outside the Village. Lakeforest Mall, a large regional mall in the City of Gaithersburg, is located

at the southern border of the Village. This older mall has experienced fluctuations in retail preferences that have occurred nationally, and it will likely undergo redevelopment. The RIO/Washingtonian Center, completed in the 2000s, is also near the Village and includes restaurants, entertainment, and retailers such as Barnes and Noble and Target. Kentlands, developed in the 1990s, also offers retail shopping and has become a popular destination for area residents. The large variety and convenient proximity of retailers nearby has, perhaps, contributed to the turnover and change in tenant mix at retail centers within Montgomery Village, such as the Village Center.

With regard to housing, Montgomery Village is a relatively stable bedroom community with a higher than average percentage of owner-occupied residential units and vacancy rates that are identical to the County. (See Table 1.) Montgomery Village offers more affordable single-family detached and attached housing options than the County overall, and its relative affordability has become greater over the past decade. Many market-rate affordable rentals and homes are available. Taking into account the 2007 to 2009 economic downturn, the County’s overall housing stock held its value more than the Village’s inventory and the Village has seen some of the highest rates of foreclosures in the County. The supply of single-family attached homes at both the County and Village levels held its value more than single-family detached homes. Demographically, Montgomery Village is more racially and ethnically diverse than the County. Attachment 2 contains additional demographic and housing information.

Table 1: Occupied Housing Units

	Plan Boundaries ¹		Demographic Study Area ²		Montgomery County, MD	
	NUMBER	PERCENT	NUMBER	PERCENT	NUMBER	PERCENT
OCCUPIED HOUSING UNITS (2010)	12,662	100%	13,620	100%	357,086	100%
Owner-occupied	8,990	71%	9,706	71%	241,465	68%
Renter-occupied	3,672	29%	3,914	29%	115,621	32%

There are 485 employers in Montgomery Village, employing 5,100 people within the Master Plan area with an annual total payroll of approximately \$204 million (see Figure 7). Overall, small businesses provide one-third of the employment in Montgomery Village, with 91% of those employing less than 20 people. The largest employer is the health and social services industry (see Figure 8).

The Gaithersburg Regional Library, renovated in 2013, is located at Montgomery Village Avenue and Christopher Avenue. There are four public elementary schools and one middle school in the Village, as well as a nearby high school. There are six religious institutions and several day care centers.

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

² Census Tracts 1.04, 7.13, 7.21, 8.10, 8.11, 8.12, and 8.13 plus Block Groups 2 and 3 in Census Tract 1.05.

ECONOMIC BASE, Montgomery Village Master Plan Area v. Montgomery County

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

	MONTGOMERY VILLAGE			COUNTY		
	Jobs	Estab.	Payroll	Jobs	Estab.	Payroll
WORKPLACE SIZE						
Less than 20 employees	31%	91%	31%	20%	89%	15%
20 to 49 employees	15%	5%	14%	12%	6%	10%
50 to 99 employees	23%	3%	33%	13%	3%	12%
100+ employees	32%	2%	23%	55%	2%	63%
PUBLIC / PRIVATE SECTOR						
Private	87%	99%	76%	79%	99%	73%
Local government	12%	1%	22%	12%	1%	13%
State government	0%	0%	0%	0.2%	0.03%	0.1%
Federal government	1%	0%	2%	9%	0%	14%
BY INDUSTRY						
Health Care & Social Assistance	29%	13%	20%	14%	11%	12%
Retail Trade	14%	11%	9%	9%	8%	5%
Educational Services	13%	2%	23%	11%	2%	12%
Accommodation & Food Services	11%	8%	4%	7%	6%	2%
Prof., Scientific, & Tech. Svcs	9%	21%	20%	13%	19%	20%
Consumer Services	7%	13%	4%	4%	23%	3%
Business & Household Services	6%	7%	5%	7%	6%	4%
Finance & Insurance	3%	5%	8%	5%	5%	7%
Public Administration	-	-	-	10%	0.3%	14%
Management	-	-	-	2%	0.3%	3%
Other	8%	19%	8%	17%	20%	18%

Figure 7: MVP Economic Base

Community Outreach

On October 1, 2014, Planning staff held a community kick-off meeting at Watkins Mill High School; approximately 135 people attended. This outreach meeting officially notified the community that the Plan is underway and started engaging stakeholders in discussions about what they want addressed through this process and what their ideas are regarding the future of the Village. Provided with stickers that said “I want (fill in the blank) in my Village,” attendees were asked to identify issues that were important to them, including those not highlighted in previous visioning exercises. By asking participants to think about what they like now and what they would like to see in the Village in the future, staff is hoping to generate ideas from community members.

For this Master Plan, staff recommends a variety of community outreach methods to engage all stakeholders, including residents, commercial and multi-family property owners, employees and business owners. By allowing all sides an avenue to express viewpoints (individually or as part of an association), staff wants to ensure that all stakeholders have a voice in the process. Outreach will include a series of issue-specific community workshops, small group meetings, staff participation in MVF meetings, and online and social media platforms. Translation services will be provided at public meetings and a handout describing the Montgomery Village Master Plan process has been translated into Spanish. An interactive map and photo contest have been utilized to allow interested parties to define what is most valuable in Montgomery Village. The hashtag “#mvplan” is being used and it has a dual meaning: Montgomery Village Plan and Most Valuable Place.

JOBS BY INDUSTRY

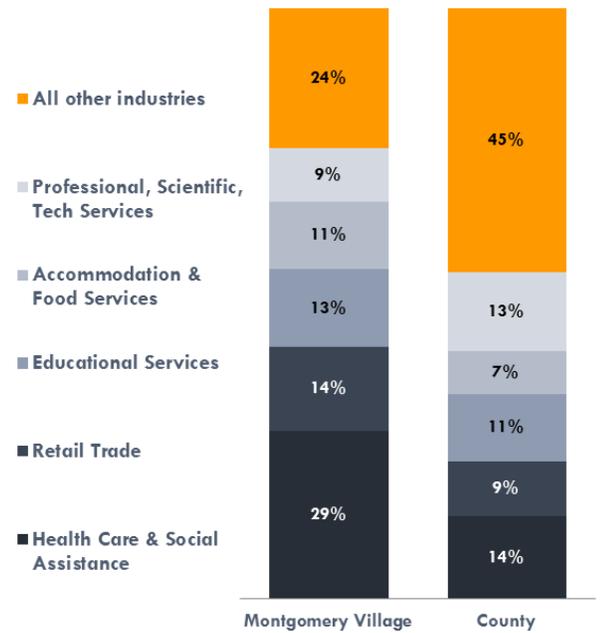


Figure 8: Jobs by Industry

Staff will be working with the Montgomery Village Foundation, the homeowners associations, civic organizations, and the Gaithersburg and Hispanic chambers of commerce to assist in notifying the various stakeholders through e-mail, marquees, and mail to aid in the conversation about the future of Montgomery Village.

Schedule

The MVMP officially started on October 1, 2014 and the Planning Board Draft of the Master Plan is scheduled to be transmitted to the County Council and County Executive in one year, by October 2015. The Plan’s major milestones are outlined below and the schedule is shown on Attachment 3.

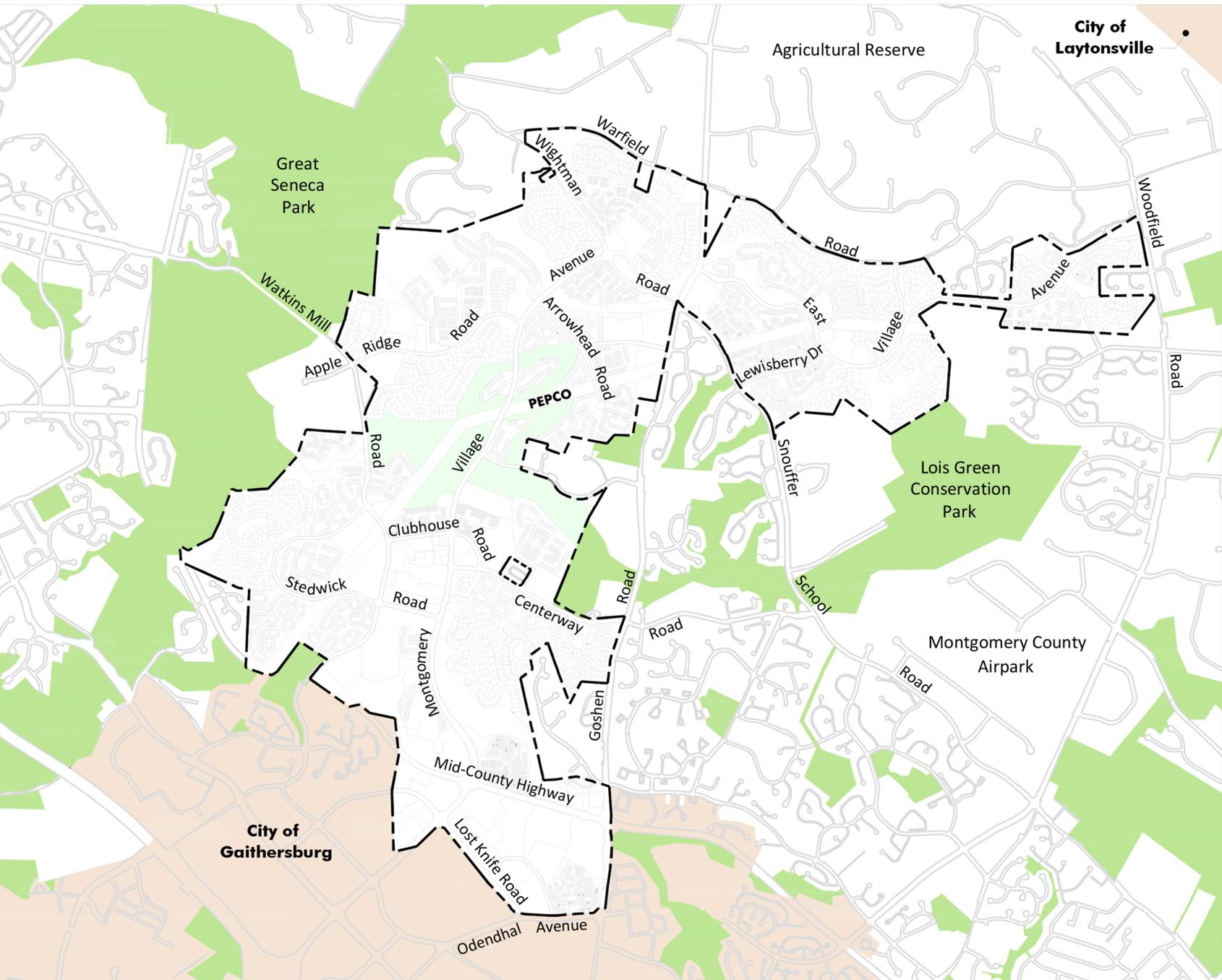
October 2014 - March 2015	Outreach, Plan Development
April – September 2015	Planning Board Review: Public Hearing, Worksessions
October – November 2015	County Executive Review
December 2015	County Council Public Hearing
January - March 2016	County Council Review: Committee and Full Council Worksessions
April – June 2016	Sectional Map Amendment (Zoning Process)

Attachments

- 1. Montgomery Village Master Plan Area
- 2. Community Snapshot
- 3. Project Timeline

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Montgomery Village Master Plan Area



- Montgomery Village Master Plan Boundary
- Municipalities
- Parkland
- Former Golf Course

ATTACHMENT 1



ATTACHMENT 2

Montgomery Village Master Plan

RESEARCH SUMMARY

December 2, 2014

RESEARCH + SPECIAL PROJECTS DIVISION
Montgomery County Planning Department

DEMOGRAPHICS

FORECAST

POPULATION + HOUSEHOLDS

HOUSING

EMPLOYMENT

COMMERCIAL SPACE

DATA SOURCES AND GEOGRAPHIES

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

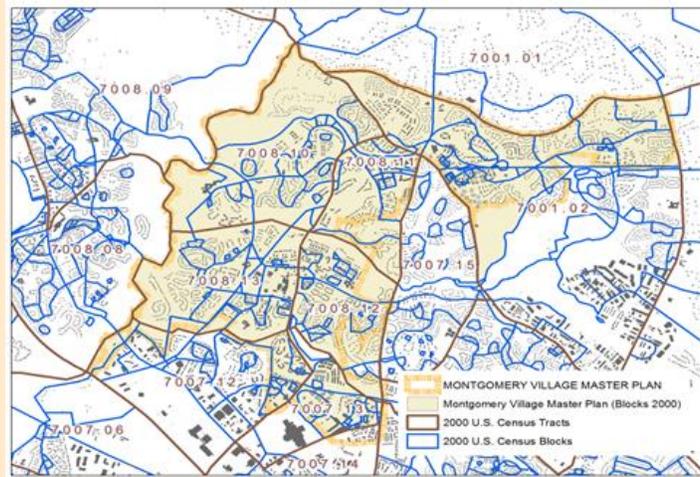
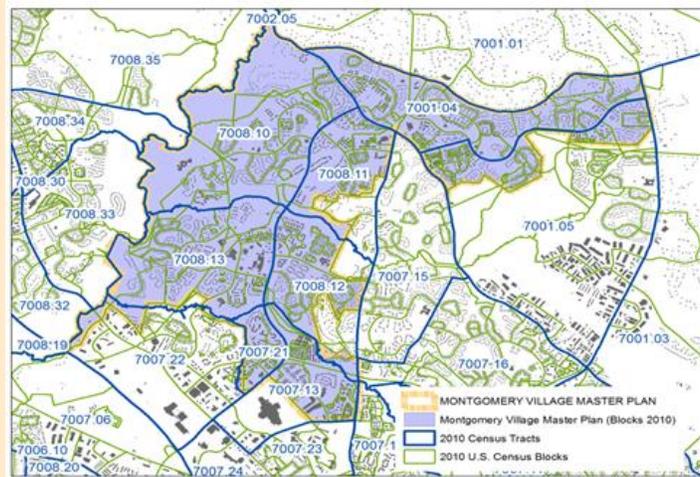
DECENNIAL CENSUS DATA

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

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

MONTGOMERY VILLAGE MASTER PLAN AREA

2010 and 2000 Decennial U.S. Census boundaries



MONTGOMERY VILLAGE MASTER PLAN

POPULATION + HOUSEHOLD COUNTS by time period and data source

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

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

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

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

AMERICAN COMMUNITY SURVEY DATA

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

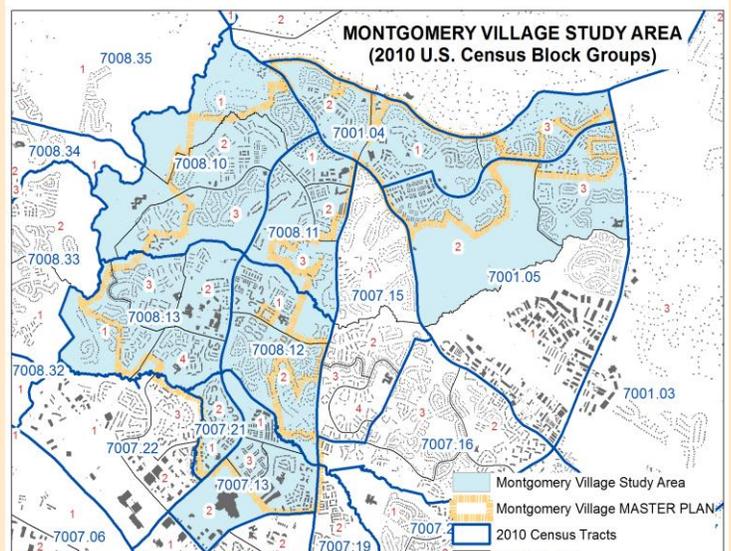
Due to sample size limitations, this analysis reports detailed American Community Survey population and household variables (age, education, income, etc.) for a slightly larger area than the master plan boundaries. This area, called the **Montgomery Village Demographic Study Area**, is defined by Census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

COG FORECAST DATA

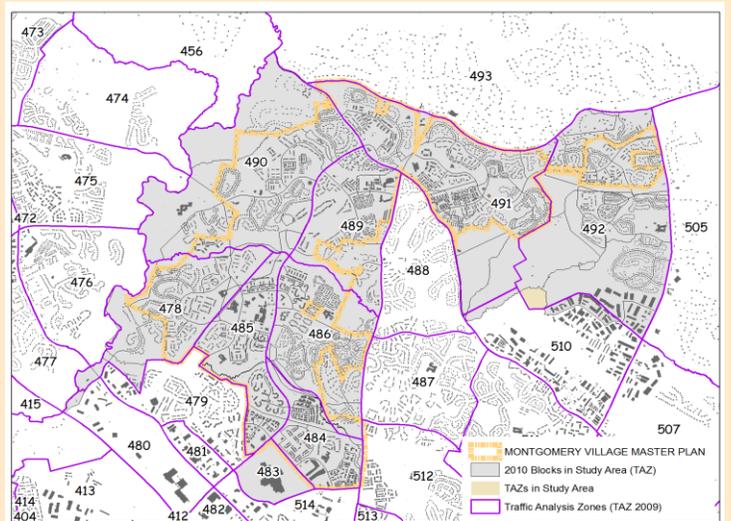
COG Forecast data are reported in traffic analysis zones (TAZs) which do not correspond to Census tracts and blocks.

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

MONTGOMERY VILLAGE DEMOGRAPHIC STUDY AREA (DSA)
2008-2012 5-Year American Community Survey boundaries

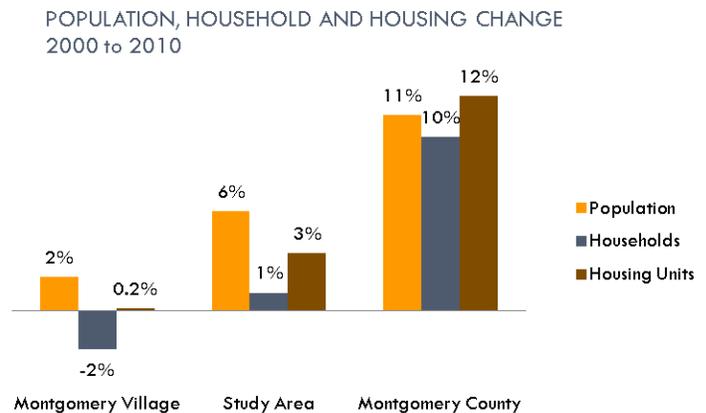


MONTGOMERY VILLAGE MASTER PLAN AREA (MPA)
and DEMOGRAPHIC STUDY AREA (DSA) BOUNDARIES
(TAZ-based approximations), Round 8.3 COG Forecast



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

- According to the U.S. Decennial Census, Montgomery Village’s population increased by 2 percent (663 persons) between 2000 and 2010, well below the County’s 11 percent population growth over the same period. The Study Area lost 2 percent of its population over the decade.
- The number of households in Montgomery Village declined 2 percent (286 households), versus a 10 percent increase countywide. There was virtually no net growth in the Montgomery Village housing supply over the decade (0.2 percent versus 12 percent in the County), indicating that the decrease in households is likely due to residents vacating existing housing units. The portion of the Demographic Study Area that does not include the Master Plan Area had an 81 percent increase in housing units and households alike, a further sign that household loss is concentrated within the MPA.
- Owner and renter households declined at the same 2 percent pace in Montgomery Village. In the county as a whole, by contrast, there was an 8 percent increase in the number of homeowner households and a 14 percent increase in renter households.
- With a growing population and fewer households, the average size of a Montgomery Village household increased from 2.61 to 2.73 persons over the decade, outpacing growth in average household size countywide from 2.66 to 2.70 persons.



MONTGOMERY VILLAGE MASTER PLAN

POPULATION + HOUSEHOLD CHANGE, 2000 to 2010

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

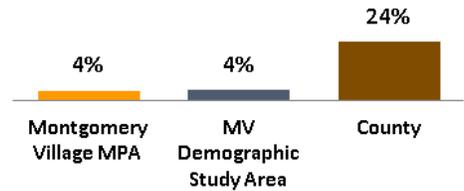
	MONTGOMERY VILLAGE MASTER PLAN AREA ¹				MONTGOMERY VILLAGE DEMOGRAPHIC STUDY AREA ²				MONTGOMERY COUNTY, MARYLAND			
	2000	2010	change	%	2000	2010	change	%	2000	2010	change	%
POPULATION	33,983	34,646	663	2%	35,812	37,873	2,061	6%	873,341	971,777	98,436	11%
HOUSEHOLDS	12,948	12,662	-286	-2%	13,478	13,620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

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

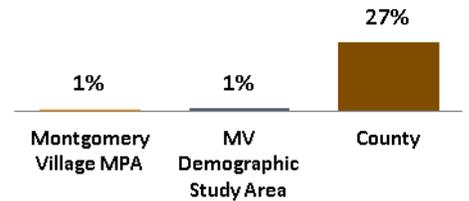
² Census tracts 1.04, 7.13, 7.21, 8.10, 8.11, 8.12, and 8.13 plus Block Groups 2 and 3 in Census tract 1.05.

- According to the Round 8.3 COG Forecast, Montgomery Village’s population is forecast to grow by 4 percent between 2010 and 2040, well below the 24 percent forecast growth rate for the County as a whole.
- Households in Montgomery Village are forecast to grow at a slower pace than population, increasing 1 percent over the same period. In contrast, the County’s household base is forecast to increase 27 percent between 2010 and 2040.
- With population growing more quickly than households, the average household size in Montgomery Village is forecast to reach 2.83 persons per household in 2040 compared to 2.61 in Montgomery County as a whole.

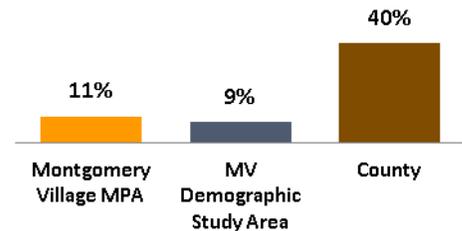
POPULATION FORECAST
2010 TO 2040



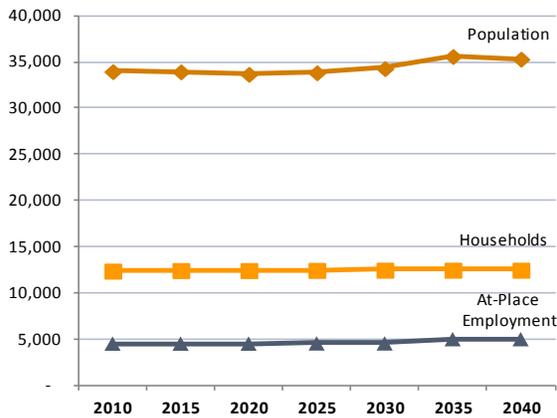
HOUSEHOLD FORECAST
2010 TO 2040



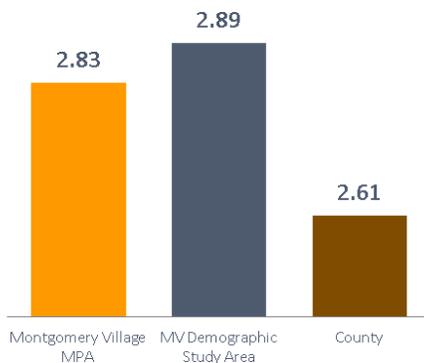
AT-PLACE EMPLOYMENT FORECAST
2010 TO 2040



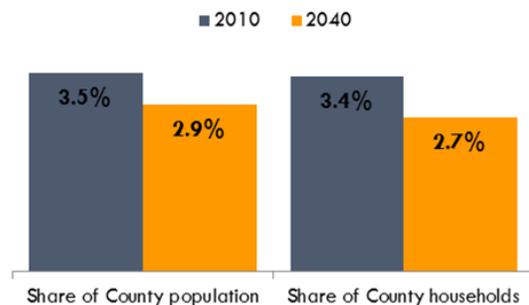
ROUND 8.3 COG FORECAST



2040 FORECAST
AVERAGE HOUSEHOLD SIZE



MONTGOMERY VILLAGE SHARE OF TOTAL POPULATION AND HOUSEHOLDS COUNTYWIDE



Montgomery Village Master Plan

POPULATION SUMMARY

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

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

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

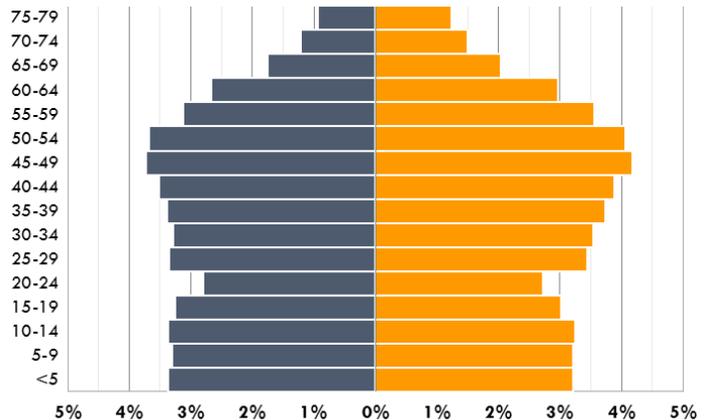
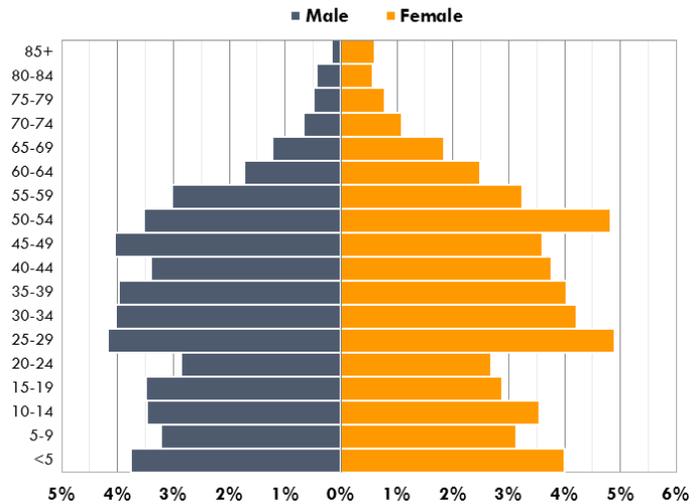
² "Other" includes American Indian or Alaskan Native, Native Hawaiian or Pacific Islander, Some Other Race, and More Than Two

³ Those of Hispanic origin may be of any race.

AGE DISTRIBUTION

- The population of the Montgomery Village Demographic Study Area (“Montgomery Village”) is relatively young, with 51 percent under age 35 years compared to 45 percent Countywide, according to the 2008-2012 American Community Survey.
- The school-age population (ages 5 to 17) share in Montgomery Village was slightly higher compared to the County, at 17 percent versus 18 percent.
- Young adults (ages 18 to 34) accounted for one in four persons living in Montgomery Village, compared to one in five persons Countywide.
- Montgomery Village’s senior population was comparatively small, accounting for eight percent of the population versus 12 percent of County residents.
- The median age of persons living in Montgomery Village is 37.7 years, compared to 38.4 years for the County as a whole.

MONTGOMERY VILLAGE STUDY AREA

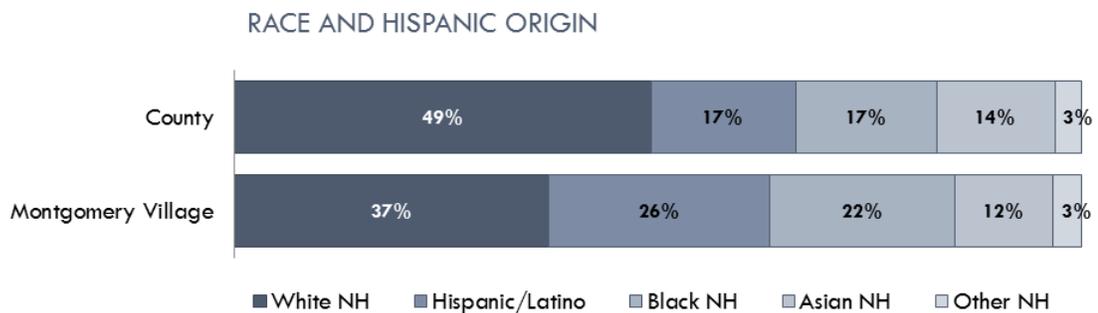


MEDIAN AGE (YEARS)



RACE + HISPANIC ORIGIN

- Non-Hispanic Whites accounted for the largest share (37 percent) of the Montgomery Village population.
- Hispanic/Latino residents made up 26 percent of the population, versus 17 percent Countywide.
- Non-Hispanic Black/African American residents made up 22 percent of the populatoin, compared to 17 percent in the County.
- The non-Hispanic Asian population share was slightly smaller in Montgomery Village at 12 percent versus 14 percent Countywide.

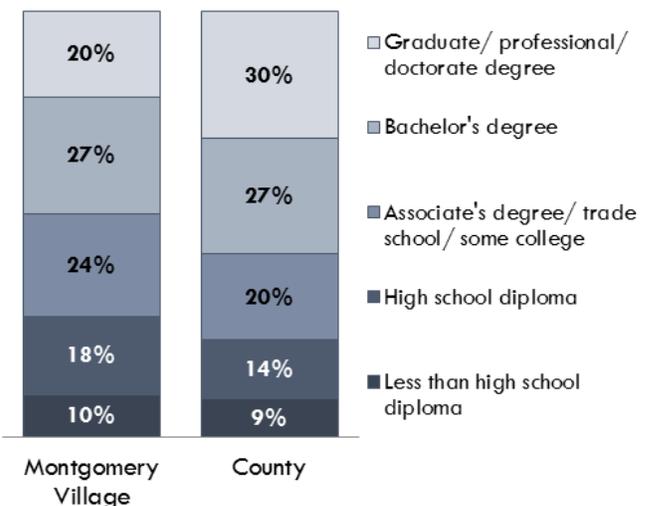


EDUCATIONAL ATTAINMENT

- Montgomery Village adults ages 25+ were slightly more likely to have less than a high school education compared to the population Countywide (10 percent versus nine percent).
- Nearly half (47 percent) of the adult population had a Bachelor’s degree or higher, compared to 57 percent in the County.
- One in five Montgomery Village adults had an advanced degree, compared to three in ten Countywide. The proportion with a Bachelor’s degree (27 percent) was equal to that of the County.
- People with associates degrees, trade school or some college eucation made up a slightly larger share of the adult popoulation in Montgomery Village (24 percent versus 20 percent Countwide).

EDUCATIONAL ATTAINMENT

Population age 25+

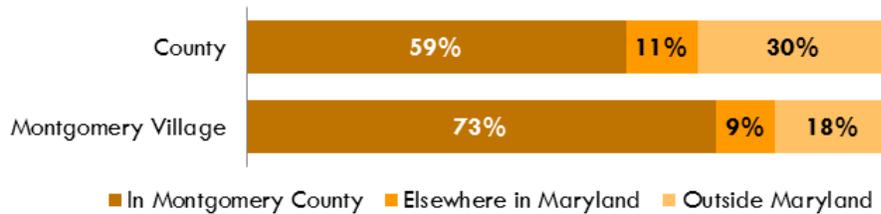


POPULATION + HOUSEHOLDS

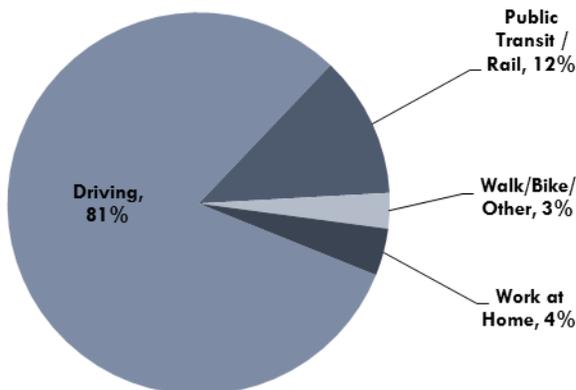
RESIDENT LABOR FORCE COMMUTE

- Montgomery Village residents were more likely to work in Montgomery County compared to the resident labor force Countywide (73 percent versus 59 percent).
- Eighteen percent commuted to jobs in Washington, D.C., Northern Virginia or other locations outside Maryland, compared to 30 percent of all workers living in Montgomery County.
- Compared to employed adults Countywide, workers living in Montgomery Village were more likely to drive to work (81 percent versus 76 percent), less likely to commute by transit (12 percent versus 15 percent) and less likely to work at home (4 percent versus 6 percent).
- The average commute time for Montgomery Village’s resident workforce was 36.4 minutes, compared to 33.9 percent for workers in the County as a whole.

WORK LOCATION



COMMUTE MODE
MONTGOMERY VILLAGE RESIDENTS



AVERAGE COMMUTE TIME
in minutes



HOUSEHOLD SUMMARY

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

INCOME DISTRIBUTION	MONTGOMERY VILLAGE ¹		MONTGOMERY COUNTY	
	number	percent	number	percent
Total Households	13,496	100%	357,579	100%
Less than \$15,000	524	4%	19,054	5%
\$15,000 to \$24,999	691	5%	16,136	5%
\$25,000 to \$34,999	1,033	8%	17,800	5%
\$35,000 to \$49,999	1,635	12%	31,921	9%
\$50,000 to \$74,999	2,355	18%	53,933	15%
\$75,000 to \$99,999	1,764	13%	44,451	12%
\$100,000 to \$149,999	2,667	20%	71,288	20%
\$150,000 to \$199,999	1,499	11%	42,665	12%
\$200,000 or more	1,328	10%	60,331	17%
MEDIAN HOUSEHOLD INCOME	\$82,230		\$96,985	

HOUSEHOLD TYPES	number	percent	number	percent
Total Households	13,496	100%	357,579	100%
Family Households	9,277	69%	244,586	68%
Married Couple	6,665	49%	190,711	53%
<i>with own children under 18</i>	3,596	27%	91,350	26%
Other family, no spouse	2,612	19%	53,875	15%
<i>with own children under 18</i>	1,410	10%	27,735	8%
Non-Family Households	4,219	31%	112,993	32%
Householder Living Alone	3,373	25%	92,197	26%
<i>with Householder Over 65 Living Alone</i>	783	6%	31,745	9%
Two or More Unrelated Householders	846	6%	20,796	6%

TENURE TYPE	number	percent	number	percent
Total Households	13,496	100%	357,579	100%
Owner households	9,985	74%	243,751	68%
Renter households	3,511	26%	113,828	32%

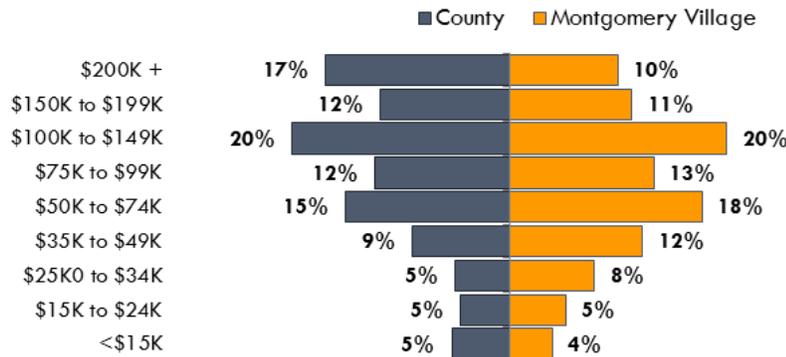
HOUSEHOLD SIZE BY TENURE TYPE	number	percent	number	percent
Owner Households	9,985	100%	243,751	100%
1-person	2,428	24%	51,797	21%
2-person	3,015	30%	78,222	32%
3-person	1,820	18%	41,947	17%
4-person	1,402	14%	42,324	17%
5-person or greater	1,320	13%	29,461	12%
Renter Households	3,511	100%	113,828	100%
1-person	945	27%	40,400	36%
2-person	745	21%	32,216	28%
3-person	811	23%	17,920	16%
4-person	554	16%	13,511	12%
5-person or greater	456	13%	9,781	9%

AVERAGE HOUSEHOLD SIZE		
All Households	2.81	2.73
Owner households	2.80	2.83
Renter households	2.81	2.43

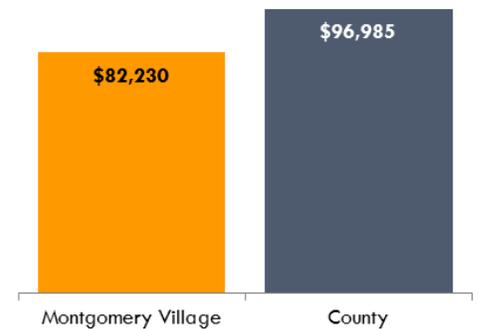
INCOME

- At \$82,230, the median household income in Montgomery Village was 85 percent of the Countywide median of \$96,985, according to the 2008-2012 American Community Survey.
- Compared to the County as a whole, Montgomery Village households were concentrated in middle income ranges, with relatively fewer households at either the very low or very high end of the income spectrum.
- Montgomery Village had more households earning between \$25,000 and \$49,999 (20 percent versus 14 percent) and between \$50,000 to \$99,999 (43 percent versus 36 percent).
- As in the County as a whole, 20 percent of Montgomery Village households earn between \$100,000 and \$149,999 per year.
- Montgomery Village earning patterns in part reflect the study area’s relatively younger age profile. Householders in their prime earning years between ages 45 and 64 are concentrated in higher income categories. Households headed by persons under age 25, who are at earlier stages of their careers and are more likely to be single, are concentrated in the lowest income categories.

INCOME DISTRIBUTION

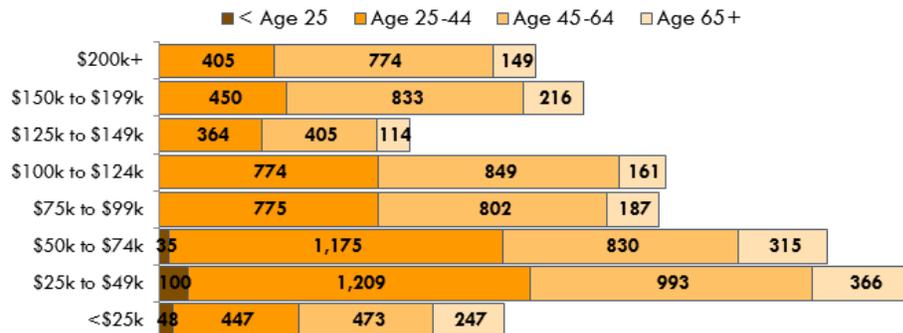


MEDIAN HOUSEHOLD INCOME



HOUSEHOLD INCOME by age of head of household

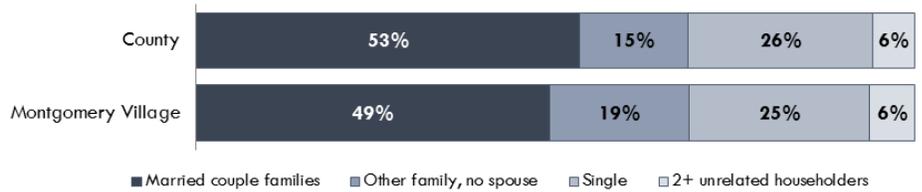
Montgomery Village



HOUSEHOLD TYPES

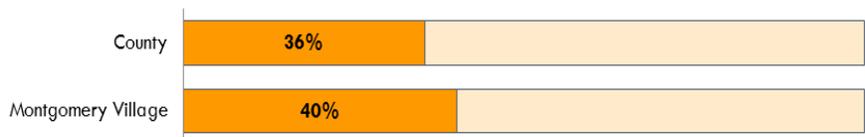
- Roughly half of Montgomery Village households (49 percent) are married couple families (with or without children). This is similar to households Countywide (53 percent).

HOUSEHOLDS BY TYPE



- Other families, including single-parent households, make up a slightly larger share of Montgomery Village households (19 percent versus 15 percent).

HOUSEHOLDS WITH CHILDREN UNDER THE AGE OF 18 YEARS

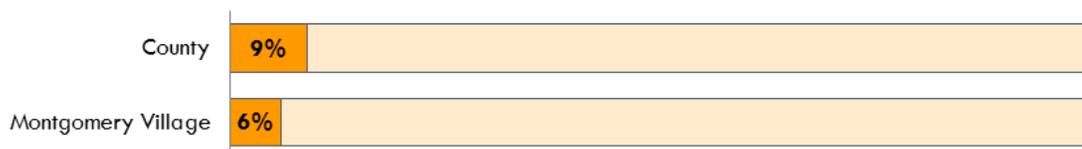


- As in the County as a whole, singles living alone account for one in four Montgomery Village households.
- Montgomery Village has a larger share of households with pre-school and school-age children (40 percent versus 36 percent).
- Fewer Montgomery Village households have one or more senior members age 65 and up (17 percent versus 24 percent).
- Seniors living alone account for 6 percent of Montgomery Village households, versus 9 percent Countywide.

HOUSEHOLDS WITH PEOPLE AGES 65 YEARS+



HOUSEHOLDS WITH SENIORS AGE +65 LIVING ALONE

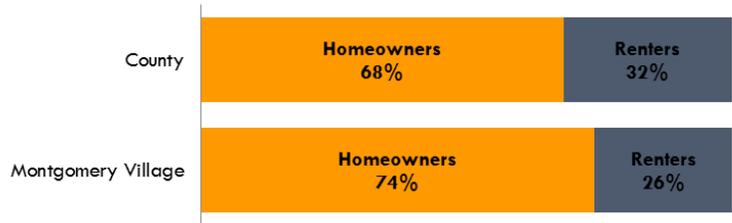


POPULATION + HOUSEHOLDS

HOUSEHOLD TENURE

- Montgomery Village had a higher homeownership rate compared to the County (74 percent versus 68 percent of households Countywide).
- Montgomery Village homeowner household sizes were similar to the County as a whole. A slightly higher proportion of Montgomery Village homeowners were singles living alone (24 percent versus 21 percent).
- Rental households had a markedly different profile from renters Countywide. Singles living alone accounted for 27 percent of renters in Montgomery Village, well below the County's 36 percent rate.
- 2-person households made up 21 percent of renter households in Montgomery Village versus 28 percent in the County. More striking is that 52 percent of Montgomery Village rental households have 3 or more persons, much higher than the 36 percent of renter households in the County. This is also higher than the proportion of Montgomery Village homeowner households with 3 or more persons (45 percent).
- In the County as a whole, the average size of a homeowner household is 2.83 persons, versus 2.43 for renter households. By contrast, in Montgomery Village, there is virtually no difference in the average size of a homeowner or renter household (2.80 versus 2.81).

HOUSEHOLDS BY TENURE TYPE

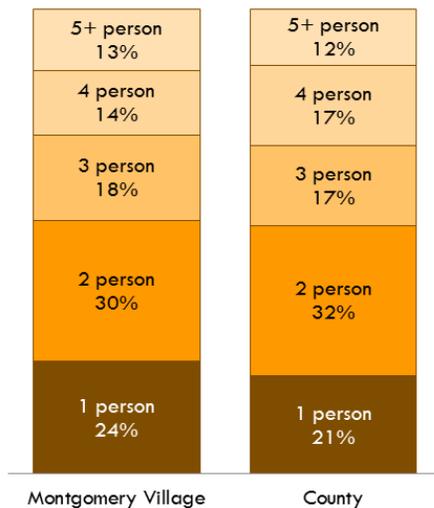


AVERAGE HOUSEHOLD SIZE

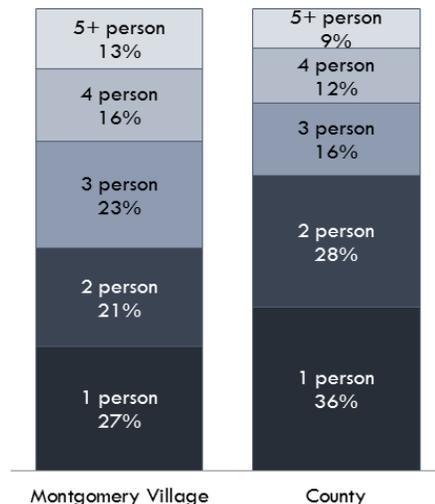
Persons per household



HOMEOWNER HOUSEHOLDS BY SIZE



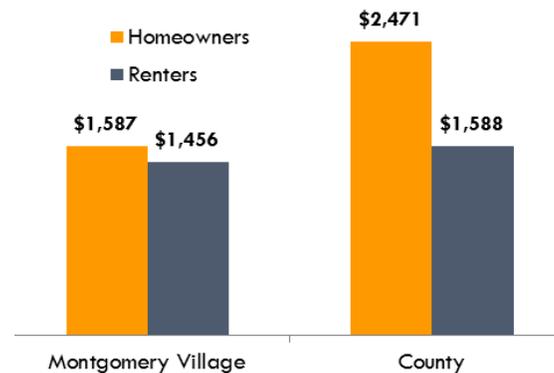
RENTER HOUSEHOLDS BY SIZE



HOUSING COSTS

- Montgomery Village homeowners had comparatively low housing costs. At \$1,587 per month, Montgomery Village homeowners on average spent only 64 percent of the \$2,471 countywide housing average.
- Even so, Montgomery Village homeowners were “housing-burdened,” spending more than a third of their household income on housing (28 percent versus 24 percent countywide).
- Renter households in Montgomery Village also were more likely to be housing-burdened compared to renters countywide (47 percent versus 41 percent), even though

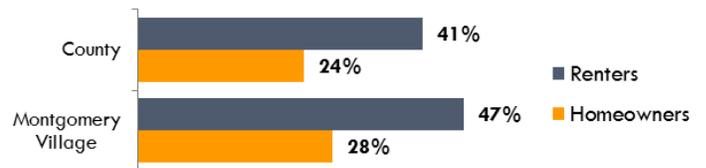
AVERAGE MONTHLY HOUSING COSTS



average rents in Montgomery Village were lower (\$1,456 versus \$1,588 per month).

HOUSING COST BURDEN

Percent of households spending 35% or more of income on housing



Montgomery Village Master Plan

HOUSING COST BURDEN

Monthly Housing Costs as a Percentage of Household Income, by Tenure

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

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

JOBS + INDUSTRY

DATA SOURCES AND GEOGRAPHIES

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

Montgomery Village Master Plan

JOBS + INDUSTRY SUMMARY

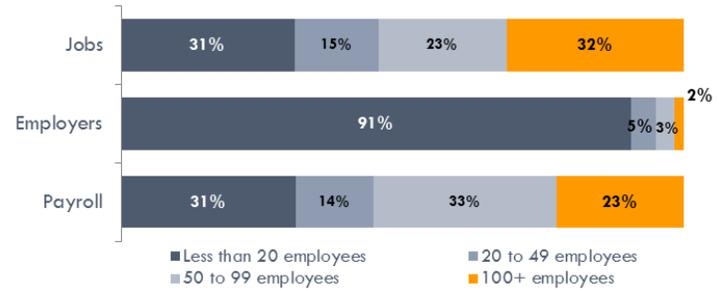
Source: Maryland DLLR, Quarterly Census of Earnings & Wages, 2nd quarter 2013

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

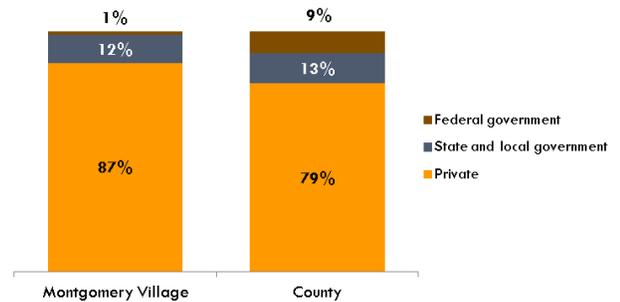
AT-PLACE EMPLOYMENT

- According to Maryland DLLR data, Montgomery Village had 485 business, non-profit and government establishments employing nearly 5,100 people as of the second quarter of 2013.
- As in the County as a whole, nine out of ten employers has fewer than 20 employees. These establishments supply 31 percent of all jobs in Montgomery Village.
- Only 2 percent of Montgomery Village employers have more than 100 employees in the plan area, but these larger establishments provide the largest share of jobs (32 percent).
- The private sector accounts for a relatively large share (87 percent versus 79 percent) of jobs in Montgomery Village, primarily because the County as a whole has a much larger federal presence (9 percent of jobs versus 1 percent in Montgomery Village).

MONTGOMERY VILLAGE EMPLOYMENT
Jobs, employers and payroll by establishment size



PUBLIC vs. PRIVATE SECTOR JOBS



MAJOR EMPLOYERS(2013)

Employers with 100+ employees in Montgomery Village

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

500 to 999 employees in MVMPA

Montgomery County Public Schools Educational Services-Elementary & Secondary Schools

250 to 499 employees in MVMPA

Community Services for Autistic Adults & Children Health Care & Social Assistance-Res. Mental Health & Substance Abuse Facilities

100 to 249 employees in MVMPA

Capital Home Care Health Care & Social Assistance-Services for Elderly & Persons w/Disabilities
 Montgomery Village Health Care Health Care & Social Assistance-Continuing Care Retirement Communities
 Montgomery Village Foundation Consumer Services-Civic Organizations
 Giant Food Retail Trade-Supermarkets/Grocery Stores
 McDonald's Accommodation & Food Services-Limited-Service Restaurants
 Little Caesars Accommodation & Food Services-Limited-Service Restaurants

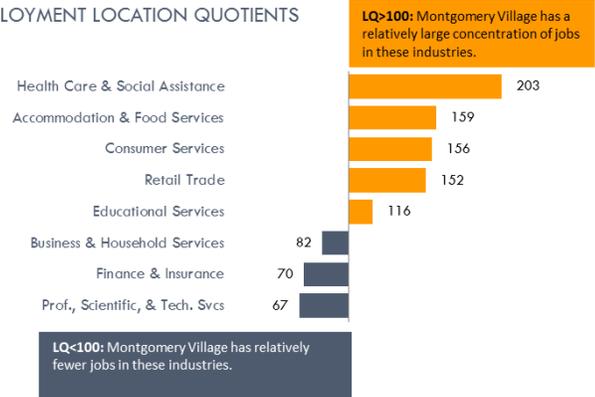
50 to 99 employees in MVMPA

Sunrise at Montgomery Village Health Care & Social Assistance-Continuing Care Retirement Communities
 Manpower International Business & Household Services-Temporary Help Services
 U.S. Postal Service Transportation & Warehousing-Postal Service
 Omnitec Solutions Professional, Scientific, & Tech. Svcs-Engineering Services
 Care Plus Home Health Health Care & Social Assistance-Home Health Care Services
 Trader Joe's Retail Trade-Supermarkets/Grocery Stores
 CHI Centers Health Care & Social Assistance-Vocational Rehabilitation Services
 H Mart Retail Trade-Supermarkets/Grocery Stores
 Family Christian Stores Retail Trade-Book Stores
 Majic Janitorial Business & Household Services-Janitorial Services
 Morgan Stanley Smith Barney Finance & Insurance-Investment Banking & Securities Dealing
 Black & Veatch Corporation Professional, Scientific, & Tech. Svcs-Engineering Services

INDUSTRY MIX

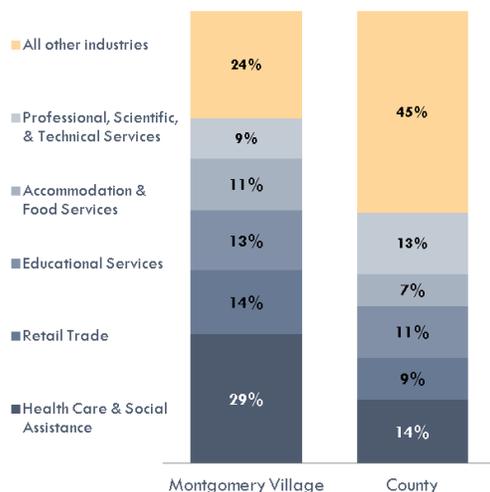
- Health Care and Social Assistance** industry establishments provide the largest share of jobs in Montgomery Village (29 percent versus 14 percent of jobs in the county). This sector includes several eldercare facilities and home health care services, as well as community services such as support for adults and children with developmental disabilities. Jobs in this sector generally serve a wider market area than Montgomery Village alone. Health Care and Social Assistance has a very high job location quotient of 203 in Montgomery Village, indicating that this industry is highly concentrated in the area.
- The next three largest job sectors, **Retail Trade** (14 percent), **Educational Services** (13 percent) and **Accommodation and Food Services** (11 percent) generally are community or neighborhood-serving. Individual establishments such as Trader Joe’s may have a wider draw. Supermarkets make up the largest retail component; Giant, Trader Joe’s and H Mart are among the largest employers in Montgomery Village. The Montgomery County Public School system accounts for most education sector jobs in Montgomery Village, which has one high school, a middle school and four elementary schools in its boundaries. Most food service jobs are in limited-service restaurants. Although national chains provide most employment in this sector, Montgomery Village also has a number of locally based, primarily ethnic food establishments.
- Although the **Professional, Scientific and Technical Services** sector supplies 9 percent of jobs in Montgomery Village, it accounts for the largest number of business establishments (21 percent). Small to mid-size architectural, engineering, law and accounting services provide most of the jobs in this sector. Most enterprises in this sector are very small computer programming, computer systems design and management consulting services with fewer than 5 employees.

EMPLOYMENT LOCATION QUOTIENTS

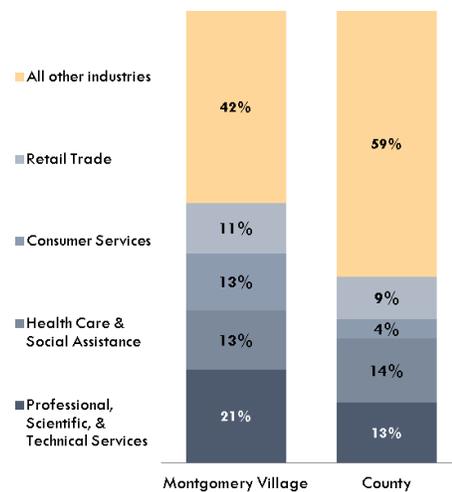


LOCATION QUOTIENT (LQ)
 = [Industry % of all jobs in MVMMPA] / [Industry % of all jobs in the County] x 100

JOBS BY INDUSTRY (2Q 2013)



ESTABLISHMENTS BY INDUSTRY



WORKFORCE

DATA SOURCES AND GEOGRAPHIES

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

INFLOW/OUTFLOW

- An estimated 97 percent of employed workers who live in Montgomery Village commute to jobs outside the master plan area boundaries.
- 93 percent of jobs in Montgomery Village are filled by people commuting into the plan area.
- Fewer than 400 people live and work in Montgomery Village.
- There is a net outflow from Montgomery Village of around 10,000 workers.

Montgomery Village Master Plan

WORKER IN-FLOW/OUT-FLOW COUNTS

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

EMPLOYED MONTGOMERY VILLAGE RESIDENTS

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

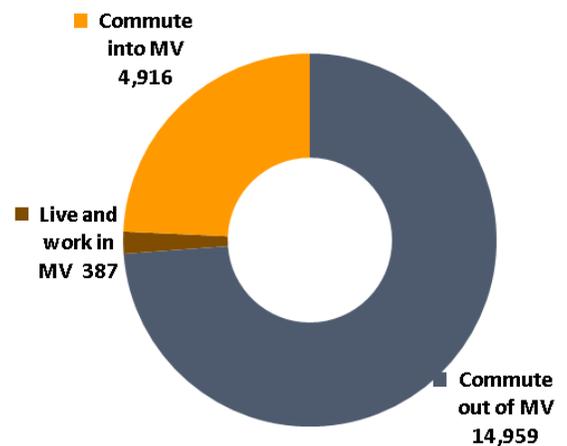
JOBS IN MONTGOMERY VILLAGE

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

NET INFLOW/OUTFLOW

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

MONTGOMERY VILLAGE COMMUTING PATTERNS



JOBS BY INDUSTRY

- Montgomery Village residents work of industries that is very similar to that of people working in the County as a whole.
- The plan area has no large IT companies or federal installations that are a mainstay of the County’s economy, and which employ many Montgomery Village residents. Professional,Scientific and Technical Services account for the largest share of resident employment (14 percent). Roughly one in ten Montgomery Village residents is a federal employee.
- A number of Montgomery Village residents also work in industries that are well-represented in Montgomery Village, including health care (13 percent), retail (10 percent), education (9 percent) and accommodation/food services (8 percent), but few work in Montgomery Village.

Montgomery Village Master Plan

in a diverse range

WORKER CHARACTERISTICS (2011)

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

JOBS BY INDUSTRY (ESTIMATED)	WORKS IN MV	LIVES IN MV	ALL COUNTY WORKERS
Health Care	34%	13%	13%
Education	15%	9%	8%
Accommodation/Food Services	8%	8%	6%
Retail	10%	10%	9%
Prof/Sci/Tech	8%	14%	15%
Public Admin	1%	10%	11%
Other	24%	36%	36%

WORKERS BY AGE	WORKS IN MV	LIVES IN MV	ALL COUNTY WORKERS
Age 29 or younger	22%	23%	21%
Age 30 to 54	57%	57%	57%
Age 55 or older	21%	20%	22%

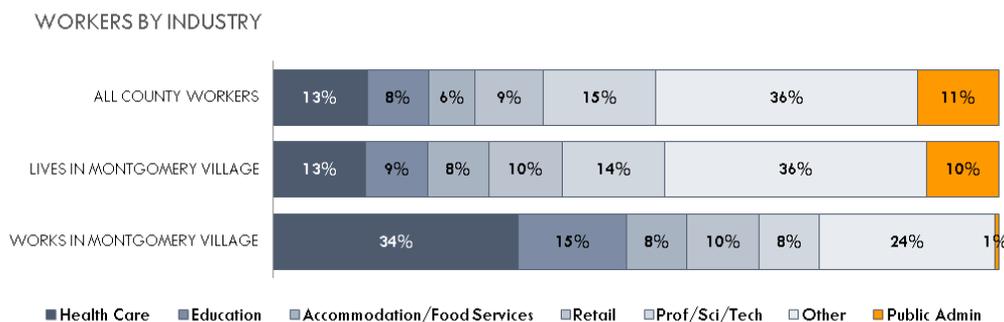
WORKERS BY INCOME	WORKS IN MV	LIVES IN MV	ALL COUNTY WORKERS
\$1,250 per month or less	29%	20%	19%
\$1,251 to \$3,333 per month	38%	31%	27%
More than \$3,333 per month	33%	49%	54%

WORKER RACE	WORKS IN MV	LIVES IN MV	ALL COUNTY WORKERS
White Alone	60%	66%	67%
Black or African American Alone	29%	23%	21%
American Indian or Alaska Native Alone	0%	1%	0%
Asian Alone	9%	9%	10%
Native Hawaiian or Other Pacific Islander Alone	0%	0%	0%
Two or More Race Groups	1%	2%	2%

WORKER ETHNICITY	WORKS IN MV	LIVES IN MV	ALL COUNTY WORKERS
Not Hispanic or Latino	89%	82%	89%
Hispanic or Latino	11%	18%	11%

EDUCATIONAL ATTAINMENT (WORKERS AGE 30+)	WORKS IN MV	LIVES IN MV	ALL COUNTY WORKERS
Less than high school	13%	15%	11%
High school diploma	22%	21%	19%
Associate's degree/some college	28%	26%	26%
Bachelor's degree or higher	36%	38%	44%

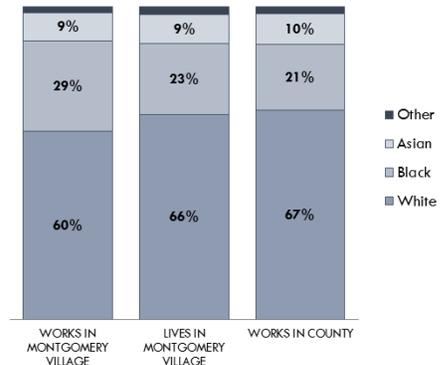
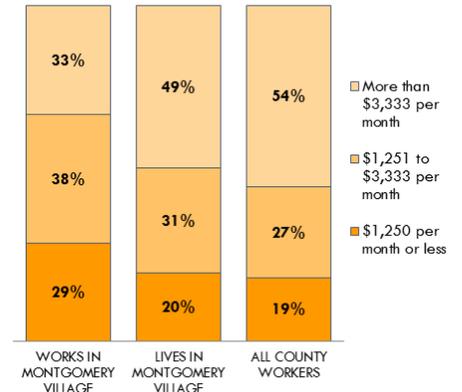
WORKER SEX	WORKS IN MV	LIVES IN MV	ALL COUNTY WORKERS
Male	41%	48%	48%
Female	59%	52%	52%



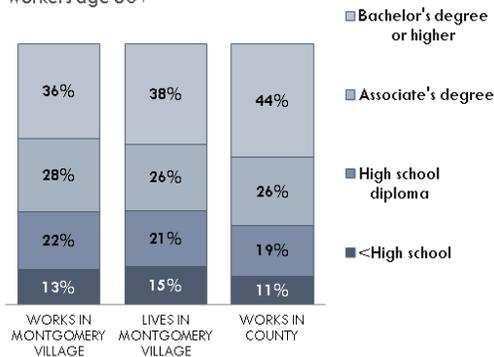
WORKFORCE CHARACTERISTICS

- Montgomery Village jobs are generally lower paying compared to the County's at-place workforce as a whole. 67 percent of jobs in the plan area pay less than \$3,334 per month, compared to 43 percent of jobs countywide. Montgomery Village residents have an earnings profile that more closely resembles the County.
- Most workers who live in Montgomery Village are White (66 percent) or Black/African American (23 percent). 18 percent of the Montgomery Village resident workforce identifies as Hispanic (Hispanics may be any race).
- Most people who work in Montgomery Village are White (60 percent) but relatively few are Hispanic (11 percent) given that Hispanics make up a larger share of the resident labor force. Black/African American workers fill a relatively large share of jobs in Montgomery Village (29 percent) given their share of the resident labor force.
- The educational attainment profile of workers who either live or work in Montgomery Village is relatively similar.
- Women make up 52 percent of the resident workforce in Montgomery Village, identical to the share of women working in jobs the County. Women make up a larger share (59 percent) of people working in Montgomery Village jobs.

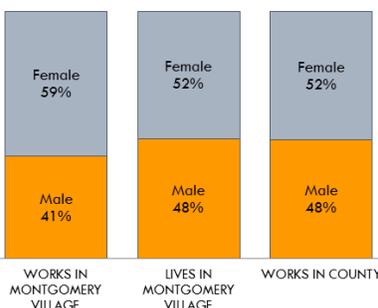
WORKERS BY INCOME RANGE



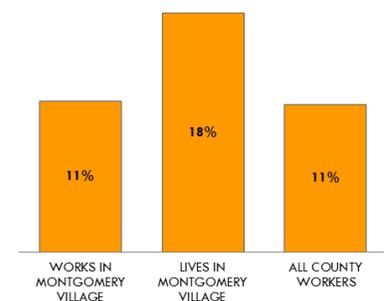
EDUCATIONAL ATTAINMENT
workers age 30+



WORKERS BY SEX



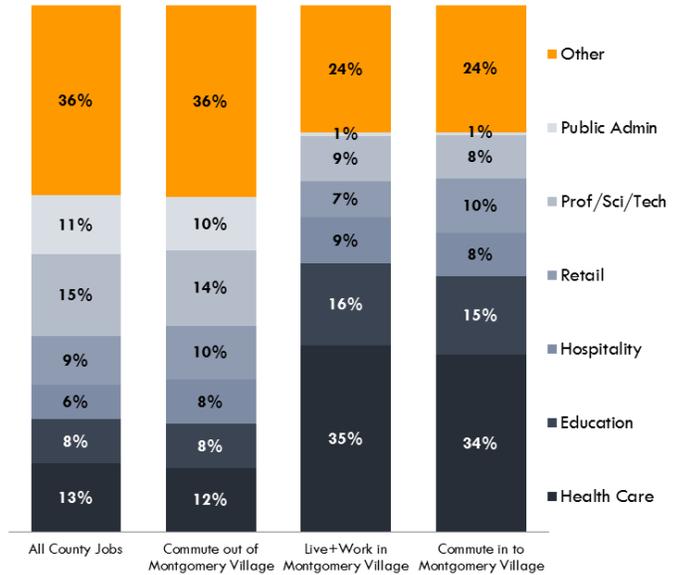
HISPANIC SHARE OF WORKFORCE



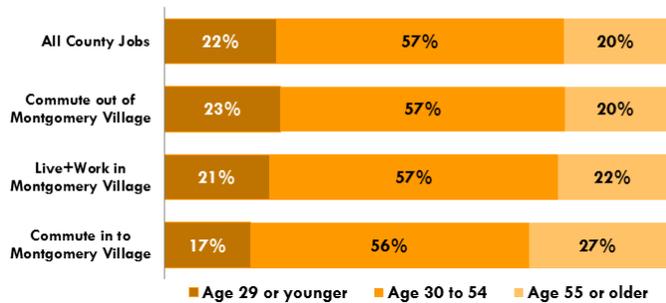
WORKFORCE CHARACTERISTICS BY INFLOW /OUTFLOW STATUS

- The job mix of out-commuters from Montgomery Village very closely resembles the county’s job base.
- As noted, many Montgomery Village residents work in industries similar to those found in Montgomery Village. Even so, fewer than 400 people both live and work in Montgomery Village, indicating that most of these residents are out-commuters.
- Out-commuters are somewhat younger than people who work in Montgomery Village, with people under the age of 30 accounting for 23 percent of out-commuters versus 17 percent of in-commuters. 27 percent of in-commuters are age 55 and up.
- People who both live and work in Montgomery Village work in a mix of industries similar to those of in-commuters, with 35 percent employed in the health care sector.
- However, a key difference is that people who live and work in Montgomery Village tend to have higher incomes than both out-commuters and in-commuters as well as workers countywide.
- In-commuters are concentrated in low-paying jobs, with 76 percent earning less than \$3,334 per month.

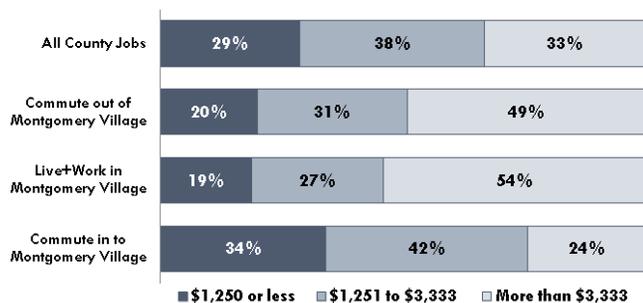
WORKERS BY INDUSTRY



WORKER AGE MIX



WORKER INCOME MIX



COMMERCIAL SPACE

DATA SOURCES AND GEOGRAPHIES

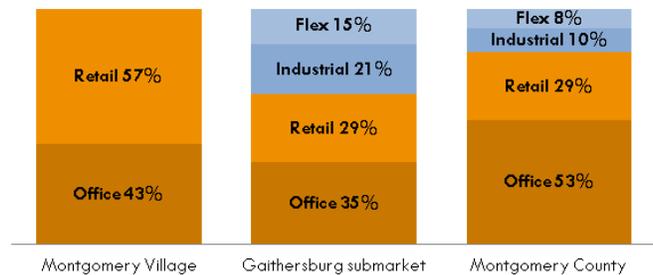
All data in this section is from Montgomery County Planning Department staff analysis of CoStar data. Montgomery Village data was obtained for the plan area boundaries. There is no separate study area.

COMMERCIAL SPACE MIX

- Retail accounts for the largest share (57 percent) of commercial space in Montgomery Village, with 741,000 square feet of leased retail space.
- There are 22 office buildings with more than 550,000 square feet of leased space. Montgomery Village has no industrial or flex space.

COMMERCIAL SPACE MIX

Percent of total square footage by type
2014 2Q



Montgomery Village Master Plan

COMMERCIAL SPACE OVERVIEW

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

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

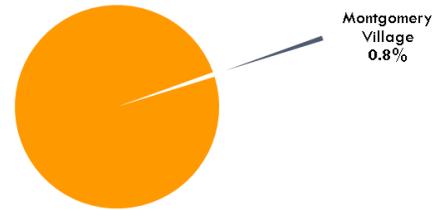
SQUARE FOOTAGE	OFFICE	RETAIL	INDUSTRIAL	FLEX	TOTAL
Montgomery County	72,974,838	39,559,302	14,167,270	11,175,484	137,876,894
Gaithersburg submarket	7,553,640	6,337,017	4,603,551	3,210,393	21,704,601
Montgomery Village MPA	552,891	741,244	0	0	1,294,135

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

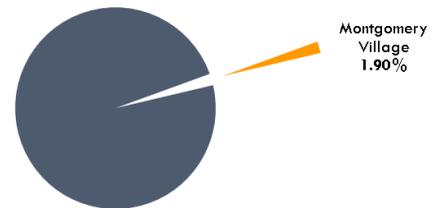
MONTGOMERY VILLAGE MASTER PLAN

- Montgomery Village accounts for 0.8 percent of office space and 1.9 percent of retail space in the county.
- Most commercial space in Montgomery Village is more than 25 years old.
- Nearly 610,000 square feet of retail space (84 percent) was built before 1990.
- Around 635,000 square feet of office space was built before 1990. Only 25,000 square feet of office space has been added in Montgomery Village since 1990.
- Nearly 80 percent of office space in Montgomery Village is lower-quality Class B & C space.

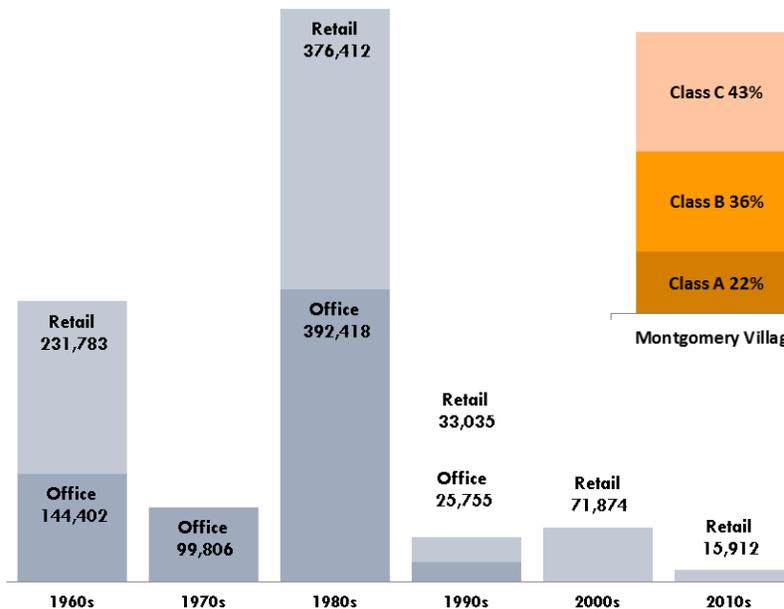
COUNTY OFFICE SPACE
2014 2Q
n = 72.9 million square feet



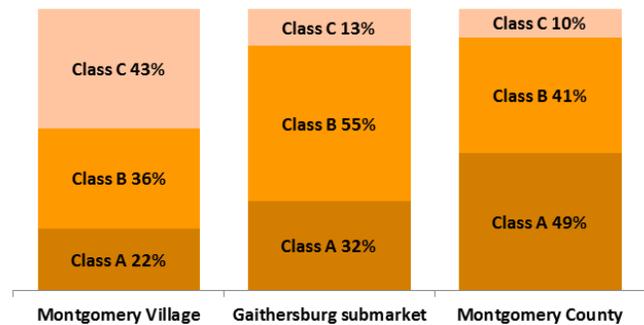
COUNTY RETAIL SPACE
2014 2Q
n = 39.6 million square feet



COMMERCIAL SQUARE FOOTAGE BY DECADE BUILT
Montgomery Village Master Plan Area



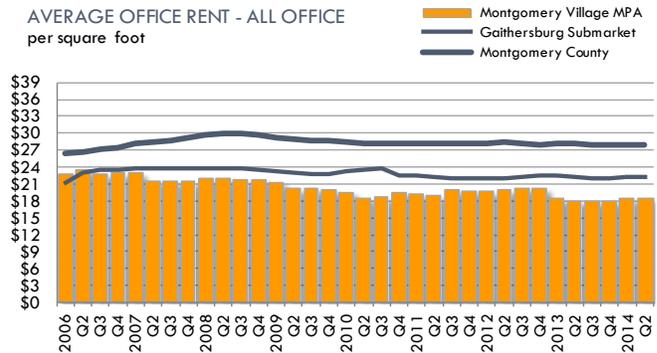
OFFICE SPACE BY CATEGORY



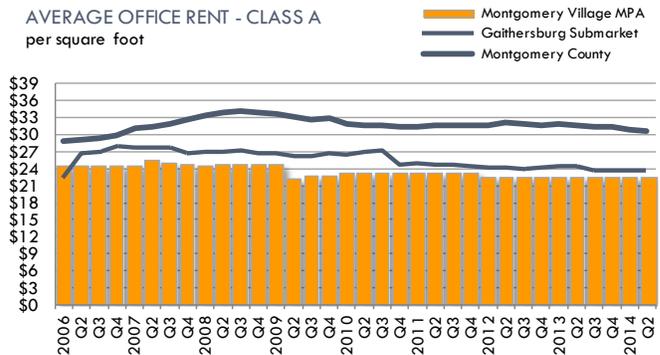
OFFICE MARKET TRENDS

- Office space rents for around \$18 per square foot in Montgomery Village, versus \$28 Countywide. Class A space rents for around \$23 per square foot on average in Montgomery Village, versus \$31 Countywide.
- At 23 percent, the office vacancy rate is well above that of the wider Gaithersburg office submarket (11 percent) and the County as a whole (15 percent).
- The vacancy rate for Class A space in Montgomery Village is even higher at 40 percent, versus 15 percent in the surrounding Gaithersburg submarket and 16 percent countywide.
- A soft office market in Montgomery County as a whole and the relatively lower quality of office space in Montgomery Village indicates that there is likely to be very weak demand for existing or new office space in the plan area.

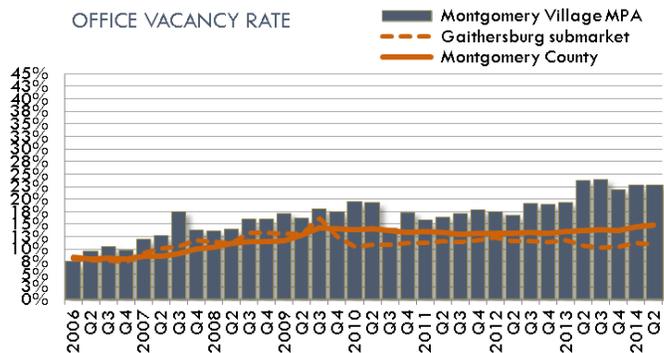
AVERAGE OFFICE RENT - ALL OFFICE per square foot



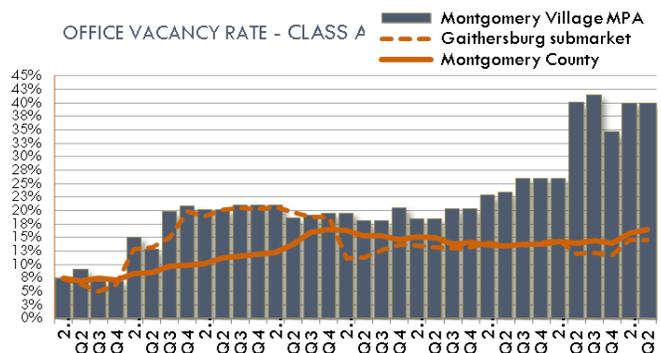
AVERAGE OFFICE RENT - CLASS A per square foot



OFFICE VACANCY RATE



OFFICE VACANCY RATE - CLASS A



Office Market Snapshot

Montgomery Village Master Plan Area

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

RETAIL MARKET TRENDS

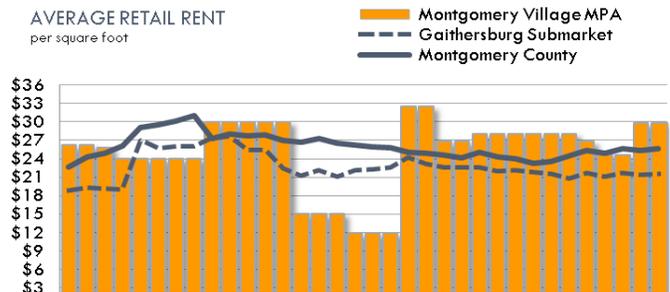
- The rental market in Montgomery Village is comparatively stronger than the office market.
- At 4 percent, the retail vacancy rate is below that of the wider Gaithersburg retail submarket and the County as a whole (both 5 percent).
- Even so, nearly 20,000 square feet of retail space was removed from the market in the past year, indicating that there may be limited demand for new retail in Montgomery Village.

Retail Market Snapshot

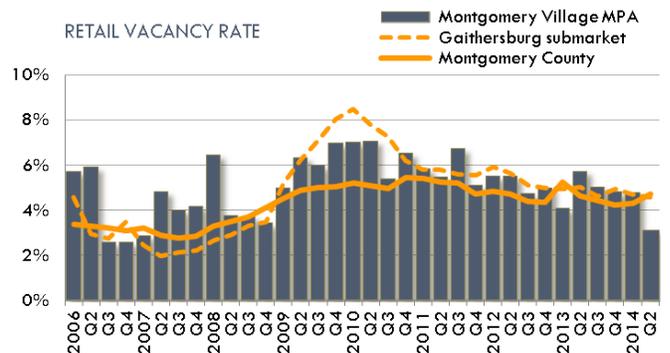
Montgomery Village Master Plan Area

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

AVERAGE RETAIL RENT per square foot



RETAIL VACANCY RATE



Montgomery Village Master Plan Proposed Schedule

