COMMERCIAL CONSTRUCTION INDICATORS

Information on the number, location, structure type, and size of new development projects in 2020 in metropolitan Washington

May 2021

Metropolitan Washington
Council of Governments

COMMERCIAL CONSTRUCTION INDICATORS: 2020 DEVELOPMENT PROJECTS
May 17, 2021

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The Metropolitan Washington Council of Governments (COG) is an independent, nonprofit association that brings area leaders together to address major regional issues in the District of Columbia, suburban Maryland, and Northern Virginia. COG's membership is comprised of 300 elected officials from 24 local governments, the Maryland and Virginia state legislatures, and U.S. Congress.

CREDITS
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EXECUTIVE SUMMARY

This report describes recent trends in the commercial real estate market within the 24 member jurisdictions of the Metropolitan Washington Council of Governments (COG). Commercial property records from the CoStar subscription database for buildings completed through the end of 2020 were analyzed to document the number, size, and location of new commercial buildings, as well as describe changes in vacancy rates across the region.

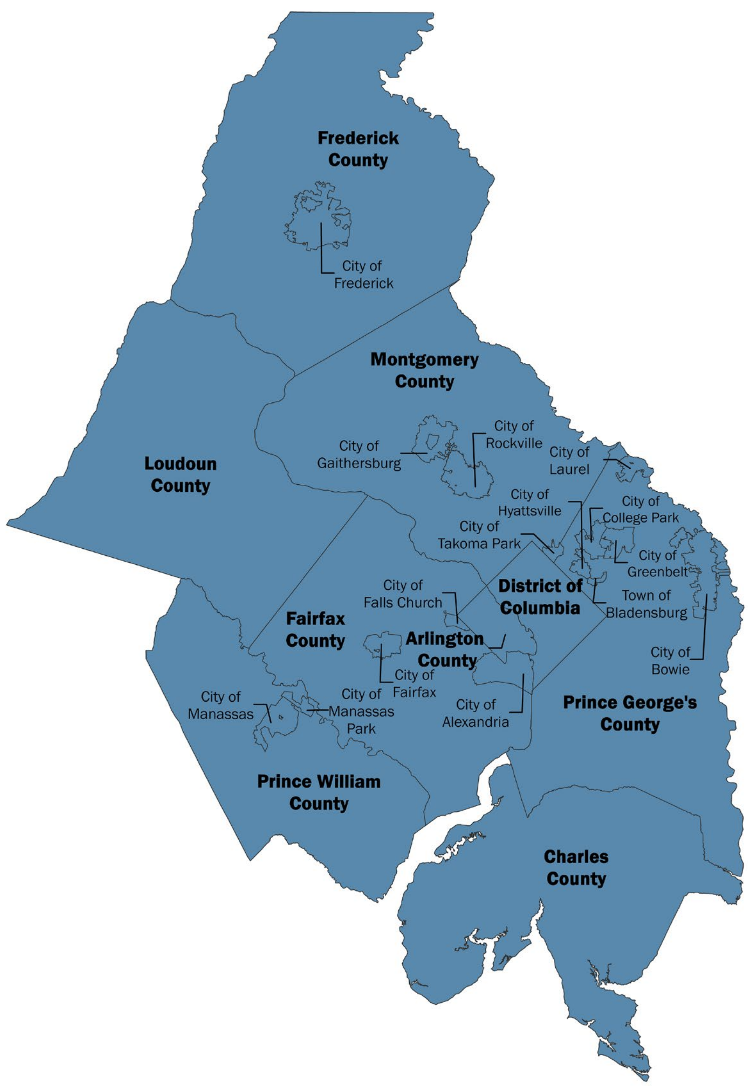
- New construction declined 29 percent from 2019 to 2020. In 2020, 124 new commercial buildings were completed, adding 10.8 million square feet of rentable space to the region.
- The overall regional vacancy rate was 10.2 percent at the end of 2020, the highest rate in four years. From 2009 through 2014, the region had a higher vacancy rate.
- The office sector held the greatest share of commercial construction in 2020, creating 35 percent of the region's new space.
- About 37 percent of commercial space built in 2020 was within a High Capacity Transit (HCT) station area. These are places around Metrorail, MARC, and VRE commuter rail, bus rapid transit, and streetcar stations that offer opportunities for optimizing connectivity and creating more transit-oriented communities.
- With three new buildings and 731,823 square feet of new space in 2020, the NoMa Activity Center was the fastest growing neighborhood in the region, accounting for seven percent of all regional commercial growth.
- Overall, 64 percent of new space was located within one of the region's 141 Activity Centers. This falls short of the 75 percent target for commercial construction set by the COG Board in the *Region Forward Vision*.

INTRODUCTION

The Commercial Construction Inventory focuses on “non-residential” projects that have been completed in metropolitan Washington. These include office, retail, industrial, flex, healthcare, religious, educational, utility, and some government properties and other projects that develop employment space, and in many cases, include associated parking structures. The inventory is limited to projects that create new or additional space. Metropolitan Washington Council of Governments (COG) staff compiled this report by analyzing commercial property records from the CoStar subscription database.

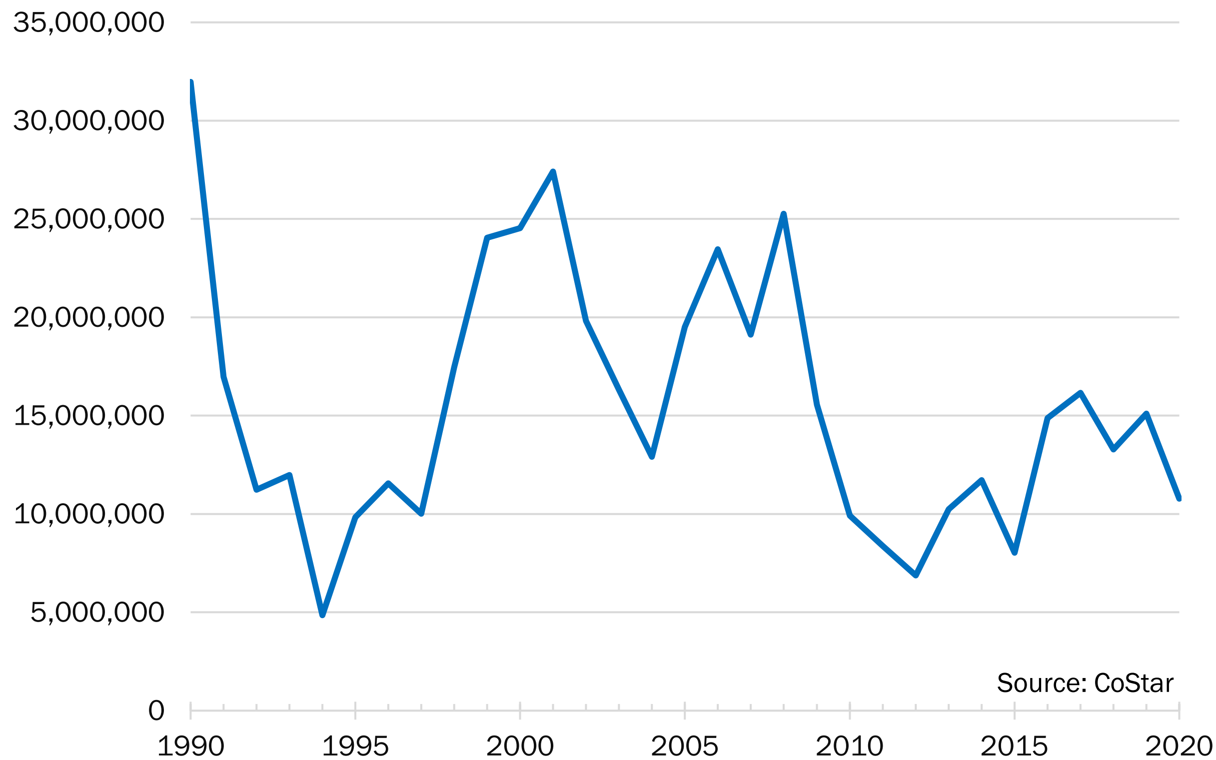
In this report, the metropolitan Washington region refers to the areas surrounding the District of Columbia that are members of COG, as shown below in Figure 1 below.

Figure 1. COG represents 24 local governments in the multi-state metropolitan Washington region.



Commercial construction in the metropolitan Washington region decreased by 29 percent in 2020. Last year, 124 new commercial buildings were completed, with 10.8 million square feet of combined space, a decline of about 4.3 million square feet from 2019.

Figure 2. Square Footage of Completed Commercial Construction, 1990 - 2020



Despite the COVID-19 pandemic, the construction industry remained an essential business throughout the year and more new space was added in 2020 than in four of the five years that followed the Great Recession (Figure 2). However, the construction total for 2020 was closer to that of the post-recession floor of 2012 than the peak of the construction recovery in 2017.

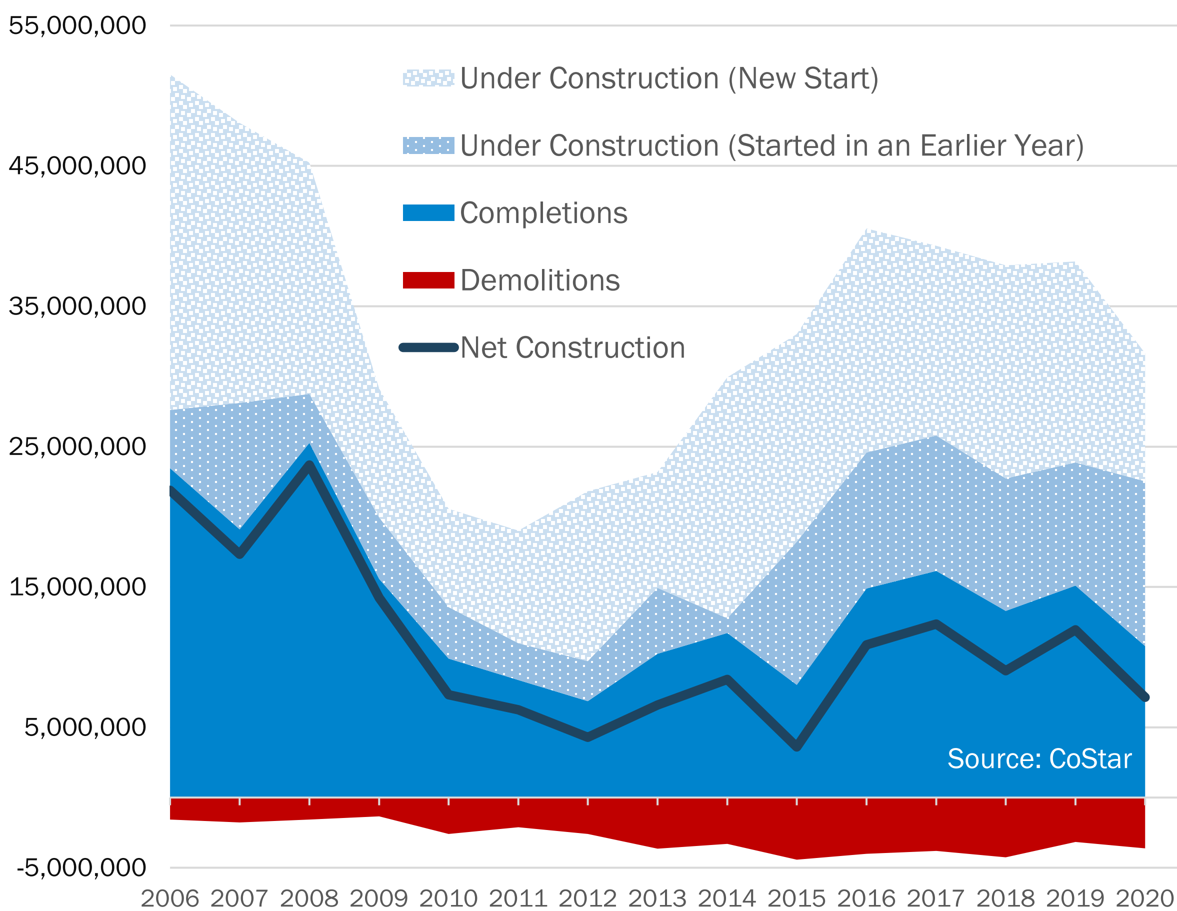
Construction, price, and vacancy trends during 2020 suggest that the pandemic intensified existing challenges and trends in commercial development with large blocks of available office and retail space.

The COG region's commercial real estate sector is experiencing record high vacancy rates and below average construction totals during a year of unprecedented challenges. However, the regional economy has weathered similar trials in recent years from the Great Recession and Federal Sequestration. The fundamentals of the region's real estate sector have largely remained unchanged.

One exception to the commercial construction headwinds has been the industrial/flex sector, which had already been growing prior to the pandemic. Preexisting trends in e-ecommerce and teleworking have created demand for warehouses, distribution centers and data centers. The pandemic economy has increased our region's need for those spaces.

In 2020, 3.6 million square feet of commercial space were demolished, representing 21 percent of the new space added last year (Figure 3). Over 9 million square feet of new commercial construction was started in 2020, and 11.8 million square feet was already under construction at the end of 2019.

Figure 3. Net Commercial Construction, 2006 - 2020



At the end of 2020, the overall regional vacancy rate for commercial space had risen to 10.2 percent, its highest point in the CoStar database. Vacancy rates remain high compared to both current national trends and historical regional trends, particularly in the office sector. However, other metropolitan areas had higher office vacancy rates at the end of 2020, including Atlanta, Chicago, Dallas, Houston, Minneapolis, and New York.[1]

[1] Q4 2020 U.S. Office Figures. CBRE, 2021.

The largest commercial project completed in 2020 was the 11-story, 620,000 square foot UM Capital Region Medical Center near the Largo Town Center Metrorail station in Prince George's County.

NoMa added more space than any other Activity Center in 2020, with three buildings and 731,823 square feet of rentable building area added. Altogether, the region's ten largest projects in 2020, shown in Figure 4 below, combined to make up 33 percent of the region's 10.8 million square feet of new commercial space.

Figure 4. Ten Largest Projects by Rentable Building Area in 2020

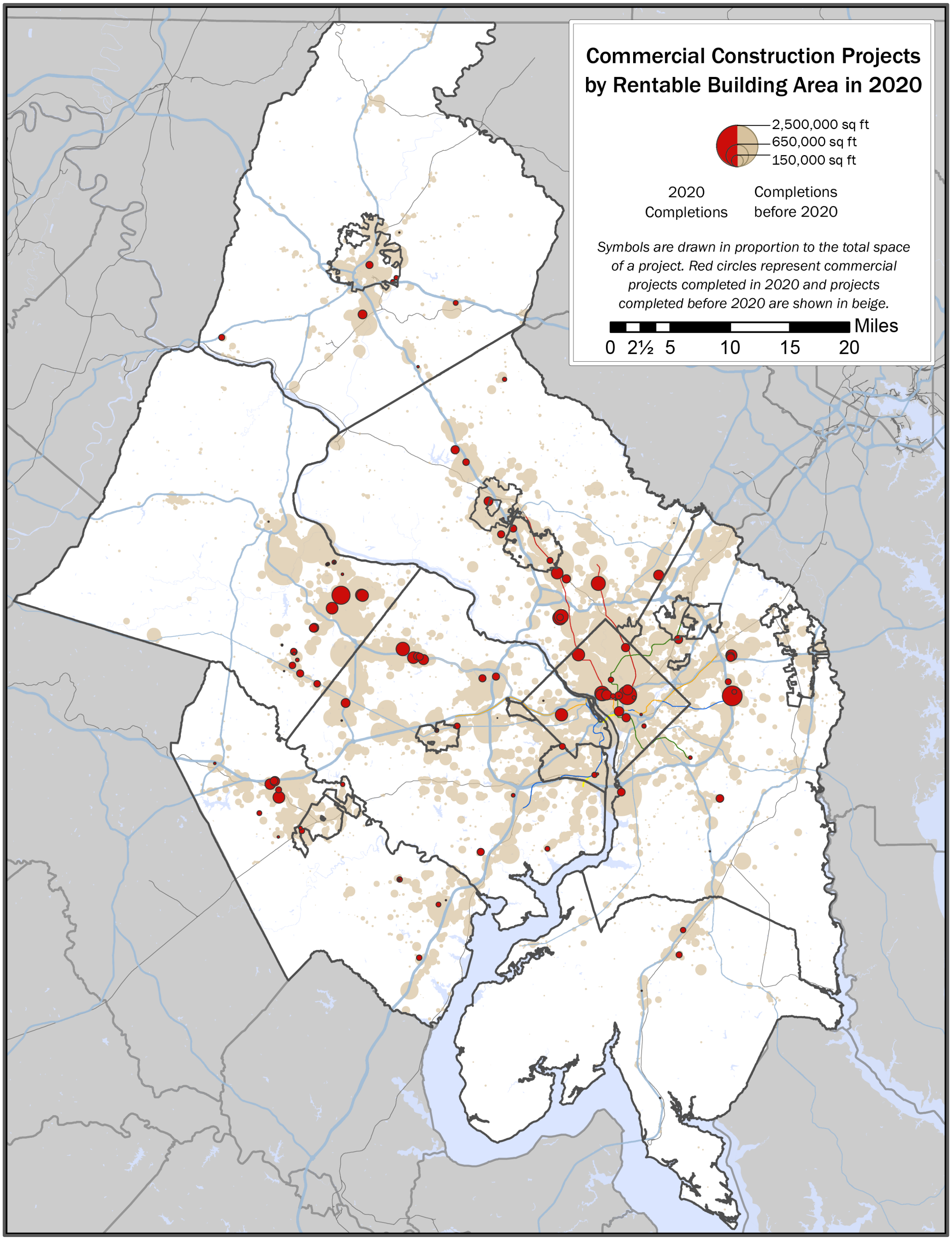
Project Name	Land Use	Street Address	Jurisdiction	Stories	RBA*
UM Capital Region Medical Center	Hospital	9403 Arena Dr Largo, MD	Prince George's County	11	620,000
Sentinel Square III	Office	45 L St NE Washington, DC	District of Columbia	11	545,823
DC15 at Ashburn North	Industrial (Data Center)	21447 Loudoun County Pky, Ashburn, VA	Loudoun County	1	510,926
2050 M Street	Office	2050 M St NW Washington, DC	District of Columbia	12	336,000
M-NCPPC HQ	Office	11219 Grandview Ave Wheaton, MD	Montgomery County	14	308,000
Suburban Hospital - North Building	Hospital	8600 Old Georgetown Rd, Bethesda, MD	Montgomery County	3	300,000
17Fifty at Reston Town Center	Office	1750 Presidents St Reston, VA	Fairfax County	18	276,000
4040 Wilson at Liberty Center	Office	4040 Wilson Blvd Arlington, VA	Arlington County	10	240,000
Georgetown Day School	School	4203 Davenport St NW Washington, DC	District of Columbia	4	236,000
M-2 Data Center	Industrial (Data Center)	44274 Round Table Plz Ashburn, VA	Loudoun County	2	223,200

*RBA = rentable building area

Source: CoStar

Figure 5 on the following page maps the location of projects completed in 2020. New construction, shown in red, was primarily located in the District of Columbia, Loudoun County and along Metrorail lines; existing units are shown in beige.

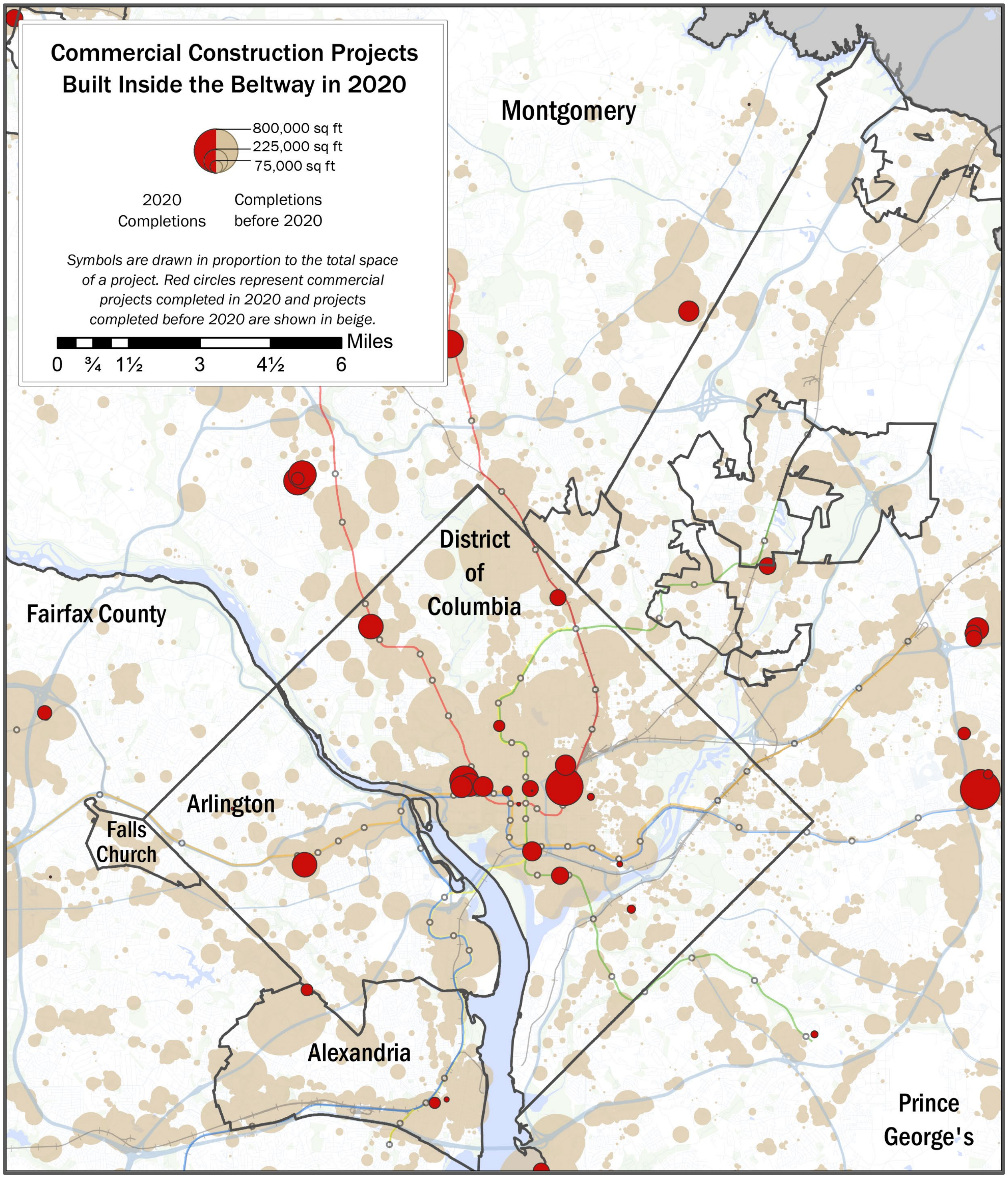
Figure 5



Source: CoStar

Figure 6 below shows construction within the Beltway. About 31 percent of regional construction in 2020 was located inside of I-495; historically, 44 percent of construction has been within the Beltway. About 76 percent of the 3.3 million square feet of space that was constructed inside the Beltway in 2020 was also within a half-mile walk of a Metrorail station, compared with only 57 percent of existing commercial construction.

Figure 6



Source: CoStar

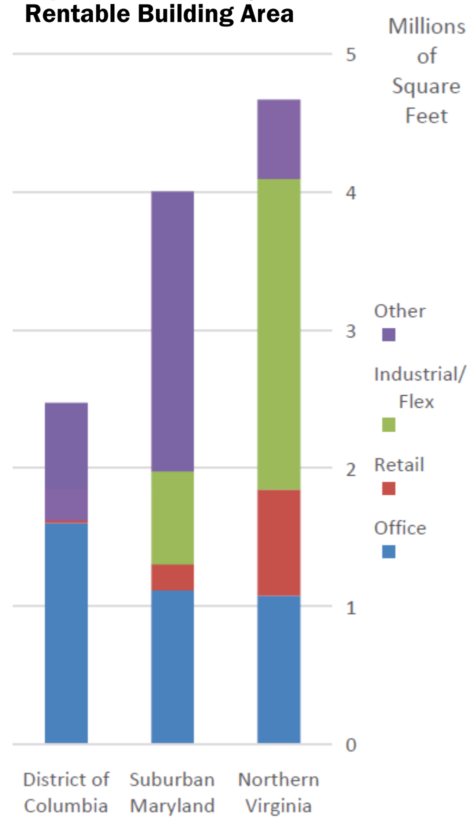
Commercial Construction by State

The District of Columbia added 18 new commercial buildings and 2.5 million square feet of space in 2020, primarily in office buildings (Figure 7). Construction in the District declined by 52 percent when compared to 2019 (Figure 8). The vacancy rate in the District of Columbia was about 11.9 percent at the end of 2020.

In 2020 38 new buildings and 3.6 million square feet of rentable space were added to suburban Maryland jurisdictions (Figure 7). In suburban Maryland, commercial construction decreased by 7 percent from 2019 (Figure 8). At the end of 2020, the Maryland jurisdiction vacancy rate was 8.8 percent.

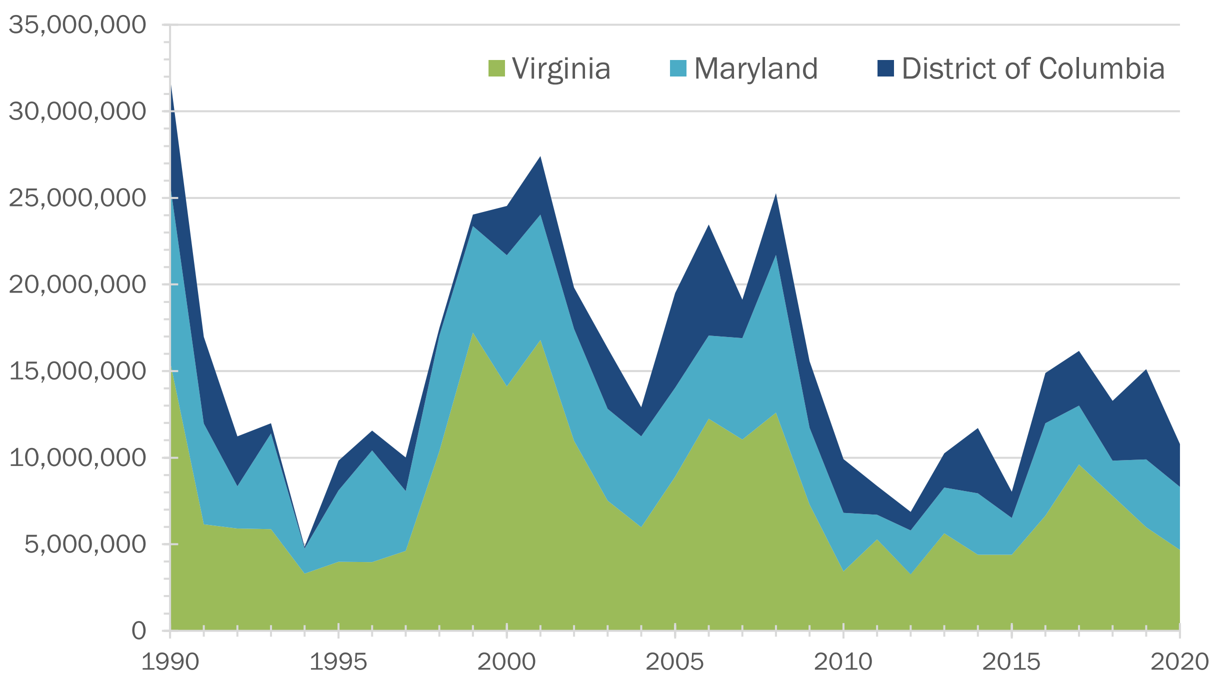
Northern Virginia jurisdictions added 68 new buildings and 4.7 million square feet of space in 2020, a decrease of 22 percent from 2019. The Virginian COG jurisdictions have led the region in construction for 36 of the last 38 years. The Northern Virginia vacancy rate was about 10.6 percent at the end of 2020.

Figure 7. 2020 Projects by Rentable Building Area



Source: CoStar

Figure 8. Square Footage of Completed Commercial Construction by State, 1990 - 2020



Note: This stacked area chart shows cumulative values.

Source: CoStar

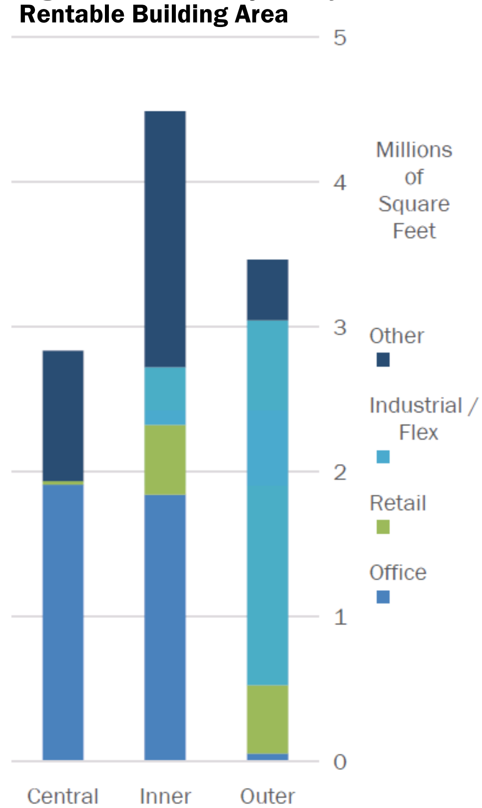
Commercial Construction by Regional "Ring"

COG groups jurisdictions into three "rings" for analysis purposes (see Appendix A). The Central Jurisdictions—D.C., Alexandria, and Arlington—added 23 new buildings and 2.8 million square feet of new space in 2020 (Figure 9). Construction in Central Jurisdictions declined by 47 percent from 2019 (Figure 10). At the end of 2020, the vacancy rate for Central Jurisdictions was 12.7 percent.

In 2020, 45 new buildings and 4.5 million square feet of space were added to the Inner Suburban Jurisdictions of Fairfax, Montgomery, and Prince George's Counties, Falls Church, and City of Fairfax (Figure 9). The total square footage of new space decreased by 15 percent from 2019 (Figure 10). The overall vacancy rate for Inner Jurisdictions was 10.4 percent at the end of 2020.

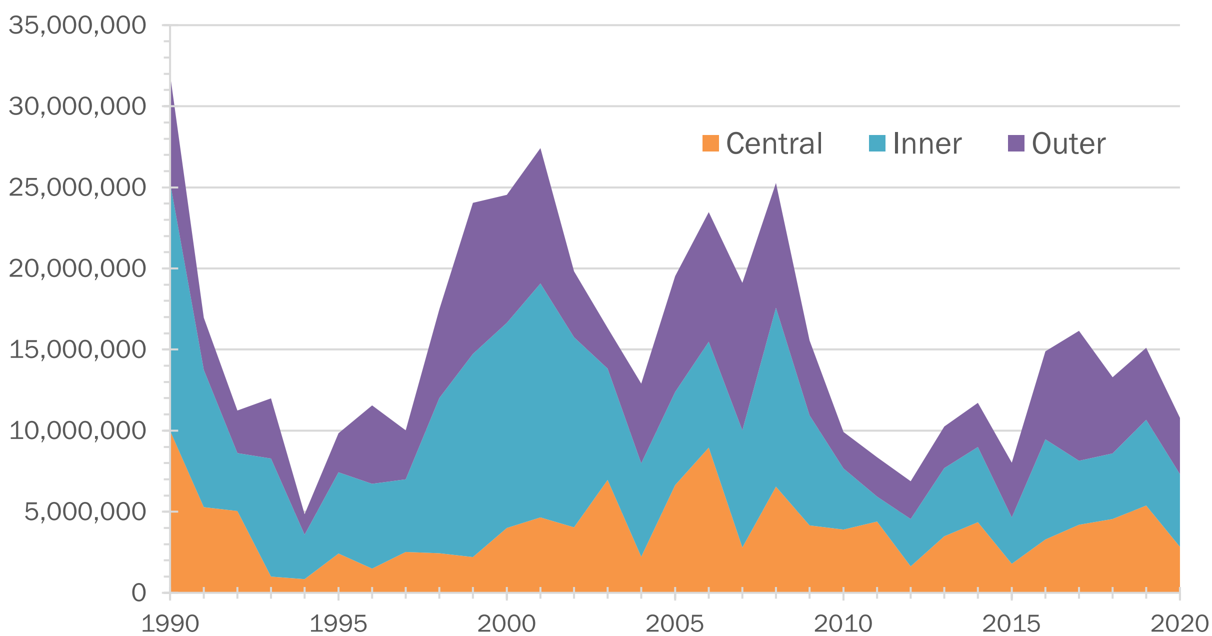
The Outer Jurisdictions of Charles, Frederick, Loudoun, and Prince William Counties, Manassas, and Manassas Park added 56 buildings and 3.5 million square feet of space in 2020 (Figure 9). New construction declined by 22 percent from 2019 (Figure 10). At the end of 2020, the vacancy rate for Outer Jurisdictions was 6.4 percent.

Figure 9. 2020 Projects by Rentable Building Area



Source: CoStar

Figure 10. Square Footage of Completed Commercial Construction by Jurisdictional Groups, 1990 - 2020



Note: This stacked area chart shows cumulative values.

Source: CoStar

Commercial Construction by Jurisdiction

The District of Columbia paced the region in commercial construction, accounting for 23 percent of the region's new rentable building area in 2020. Loudoun County had the second most construction in 2020, the majority of which come from four new data centers in Ashburn and Sterling. All major counties had at least one commercial building completed in 2020 but nine of the smaller COG jurisdictions had no construction in the past year; Bladensburg has not added new commercial space in 20 years.

Figure 11. Commercial Construction Totals for Each COG Member Jurisdiction

Jurisdiction	Built Prior to 2020			2020 Completions			Estimated 2020 Year End Vacancy Rate
	Buildings	RBA	Share	Buildings	RBA	Share	
District of Columbia	**8,020**	**260,646,175**	**22.4%**	**18**	**2,473,988**	**22.9%**	**11.9%**
Suburban Maryland Jurisdictions							
Charles	1,220	18,399,224	1.6%	4	114,625	1.1%	6.9%
Frederick	2,714	50,230,847	4.3%	9	416,104	3.9%	7.4%
City of Frederick	*1,332*	*21,379,986*	*1.8%*	*4*	*180,962*	*1.7%*	*9.2%*
Rest of County	*1,382*	*28,850,861*	*2.5%*	*5*	*235,142*	*2.2%*	*6.2%*
Montgomery	5,461	166,127,924	14.3%	14	1,656,443	15.4%	10.4%
Gaithersburg	*566*	*17,298,786*	*1.5%*	*2*	*127,992*	*1.2%*	*5.5%*
Rockville	*627*	*23,747,389*	*2.0%*	*2*	*144,442*	*1.3%*	*13.7%*
Takoma Park	*133*	*1,622,589*	*0.1%*	*0*	*0*	*0.0%*	*2.6%*
Rest of County	*4,135*	*123,459,160*	*10.6%*	*10*	*1,384,009*	*12.8%*	*10.6%*
Prince George's	6,664	155,554,308	13.4%	11	1,452,677	13.5%	7.8%
Bladensburg	*109*	*1,178,722*	*0.1%*	*0*	*0*	*0.0%*	*2.0%*
Bowie	*236*	*6,439,316*	*0.6%*	*0*	*0*	*0.0%*	*9.7%*
College Park	*269*	*5,298,706*	*0.5%*	*0*	*0*	*0.0%*	*5.6%*
Greenbelt	*105*	*5,140,702*	*0.4%*	*0*	*0*	*0.0%*	*15.7%*
Hyattsville	*238*	*3,961,849*	*0.3%*	*0*	*0*	*0.0%*	*11.6%*
Laurel	*389*	*5,502,683*	*0.5%*	*0*	*0*	*0.0%*	*7.4%*
Rest of County	*5,318*	*128,032,330*	*11.0%*	*11*	*1,452,677*	*13.5%*	*7.4%*
Maryland subtotal	**16,059**	**390,312,303**	**33.5%**	**38**	**3,639,849**	**33.8%**	**8.8%**
Northern Virginia Jurisdictions							
Alexandria	1,752	41,922,517	3.6%	3	114,462	1.1%	12.5%
Arlington	1,019	63,182,943	5.4%	2	244,312	2.3%	15.9%
Fairfax	5,361	232,882,152	20.0%	14	1,270,347	11.8%	12.2%
Fairfax City	507	9,284,122	0.8%	6	108,608	1.0%	9.0%
Falls Church	266	4,131,906	0.4%	0	0	0.0%	7.2%
Loudoun	2,443	91,628,044	7.9%	26	1,910,970	17.7%	5.9%
Manassas City	648	10,367,030	0.9%	1	20,000	0.2%	5.7%
Manassas Park	124	2,217,820	0.2%	0	0	0.0%	3.8%
Prince William	2,345	57,343,506	4.9%	16	999,000	9.3%	6.1%
Virginia subtotal	**14,465**	**512,960,040**	**44.1%**	**68**	**4,667,699**	**43.3%**	**10.6%**
COG Region Total	**38,544**	**1,163,918,518**	**100.0%**	**124**	**10,781,536**	**100.0%**	**10.2%**

Source: CoStar

Metrorail Station Walksheds

In 2020, 30 of the Washington Metropolitan Area Transit Authority's 91 Metrorail stations had at least one commercial construction project built within a half-mile walk from a station entrance, with just under 4 million square feet in 24 buildings (some projects were near more than one Metrorail station). Construction in station areas declined 30 percent from 2019.

Located near the Largo Town Center Metrorail station, the UM Capital Region Medical Center was the largest project built in 2020 (UM Capital Region Medical Center / flickr)

The share of total regional construction within a Metro station walkshed fell from 34 percent in 2019 to 28 percent in 2020. About two-thirds of new office space in 2020 was built in a Metrorail walkshed.

The Farragut North station walkshed had the most construction in 2020 with 893,129 square feet of space from four buildings. The average vacancy rate for buildings within a Metrorail walkshed was 13.8 percent at the end of 2020.

Activity Centers and High-Capacity Transit Station Walksheds

Activity Centers are locations that will accommodate the majority of the region's future growth. They include existing urban centers, priority growth areas, traditional towns, and transit hubs. In 2013, the COG Board of Directors approved 141 Activity Centers for the region[2].

From 2019 to 2020, construction within Activity Centers decreased by 33 percent. The NoMa Activity Center had the most construction in 2020, with 731,823 square feet of space from three buildings.

COG's *Region Forward Vision* set a target for at least 75 percent of new commercial construction to be located within Activity Centers. In 2020, 64 percent of new construction was within an Activity Center. In the decade since the *Region Forward Vision* was approved by the COG Board in 2010, 66 percent of commercial construction has been inside Activity Centers.

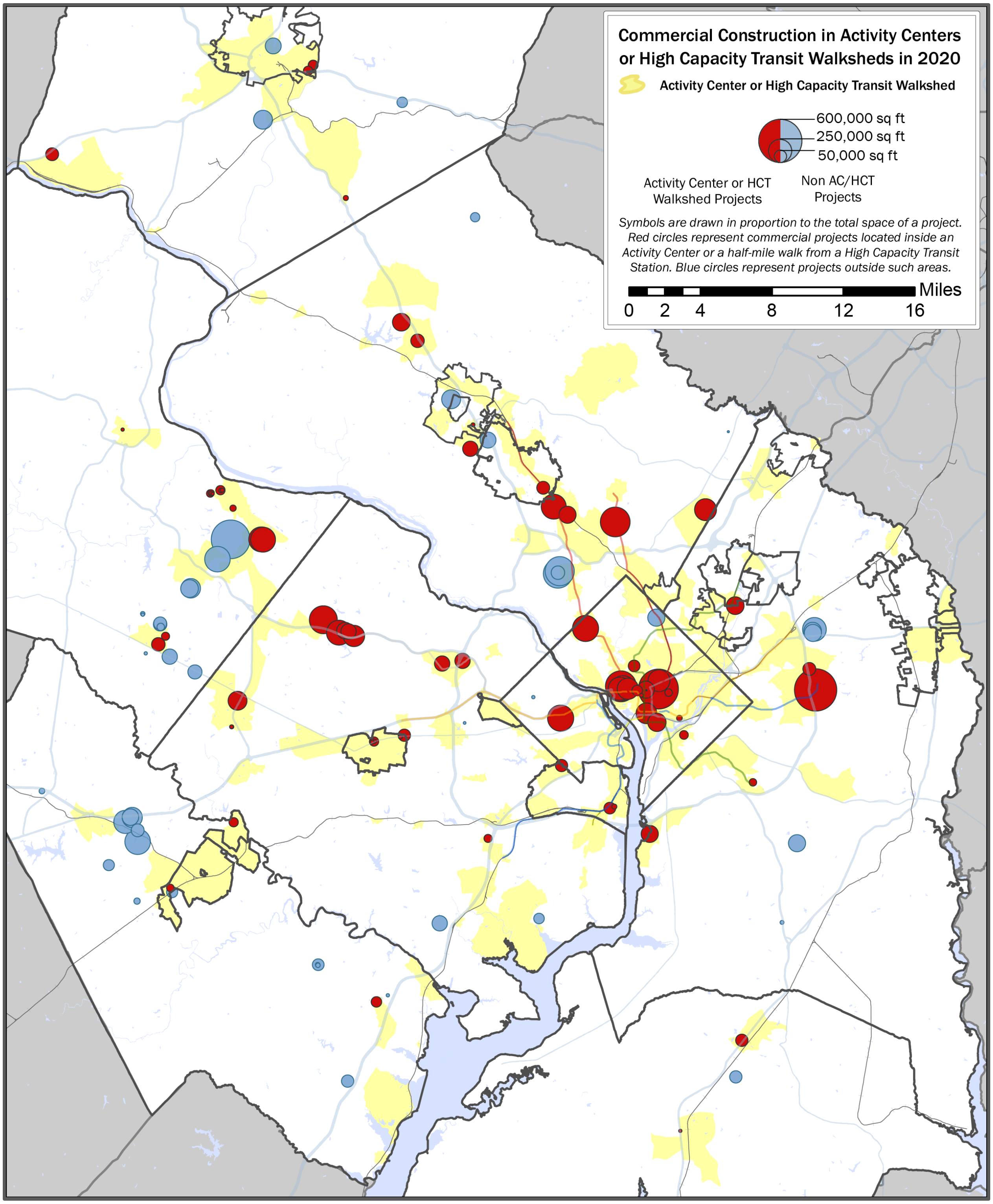
The Transportation Planning Board has identified High Capacity Transit (HCT) station areas in the region--places around Metrorail, MARC, and VRE commuter rail, bus rapid transit, and streetcar stations.[3] These areas offer opportunities for greater connectivity and creating more transit-oriented communities.

Last year, 37 percent of new commercial construction was located within HCT station areas. All but two of the of the buildings in HCT station areas were also in Activity Centers, the exceptions being small retail properties in the Branch Ave and Potomac Ave Metrorail station areas. The 75 new projects completed within either an Activity Center or HCT station areas are shown in Figure 12 below.

[2] See Appendix B for a map of Activity Centers and Appendix C for Activity Center construction totals.

[3] See Appendix D for Metrorail station area construction totals and an explanation of how the walkshed geography was calculated.

Figure 12



Source: CoStar, COG

Construction by Structure Type

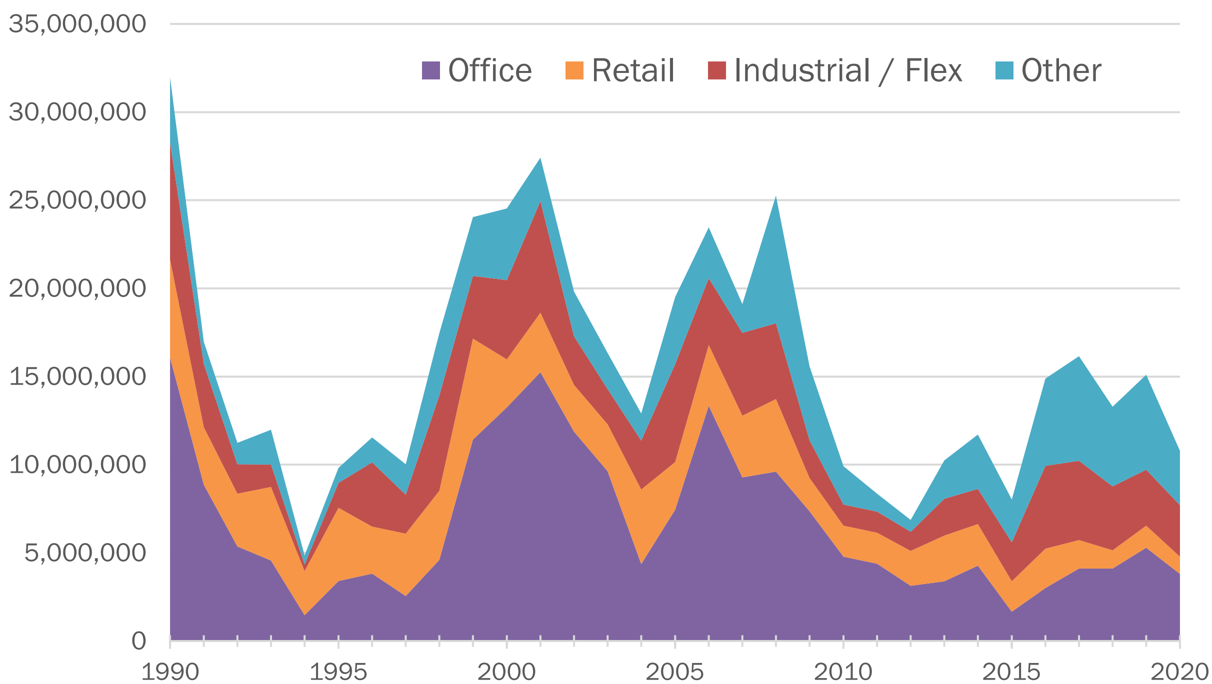
Office sector is the largest commercial real estate submarket and the main driver of employment in the COG region. Over the past decade, office buildings remained the largest source for new commercial space, but the office share of total construction fallen more than any other sector. The drop in the combined square footage of office construction bottomed out in 2014 and has since increased. Retail has also seen lower rates of construction over the past ten years and has yet to rebound. There has been a spate of recent construction in the healthcare industry; 13 hospital buildings have been built over the past ten years, which is more than had been built in the previous 32 years combined.

Figure 13. Table of Construction by Construction Type

Structure Type	Prior to 2020			2020		
	Buildings	Square Feet	Share	Buildings	Square Feet	Share
Office	10,453	487,884,181	41.9%	23	3,799,858	35.2%
Retail	17,524	230,238,785	19.8%	47	975,796	9.1%
Industrial / Flex	6,551	236,347,710	20.3%	23	2,920,767	27.1%
Healthcare	396	41,000,603	3.5%	5	1,060,054	9.8%
Hospitality	691	81,355,999	7.0%	12	781,370	7.2%
Other	2,929	87,091,240	7.5%	14	1,243,691	11.5%
Total	38,544	1,163,918,518	100.0%	124	10,781,536	100.0%

Source: CoStar

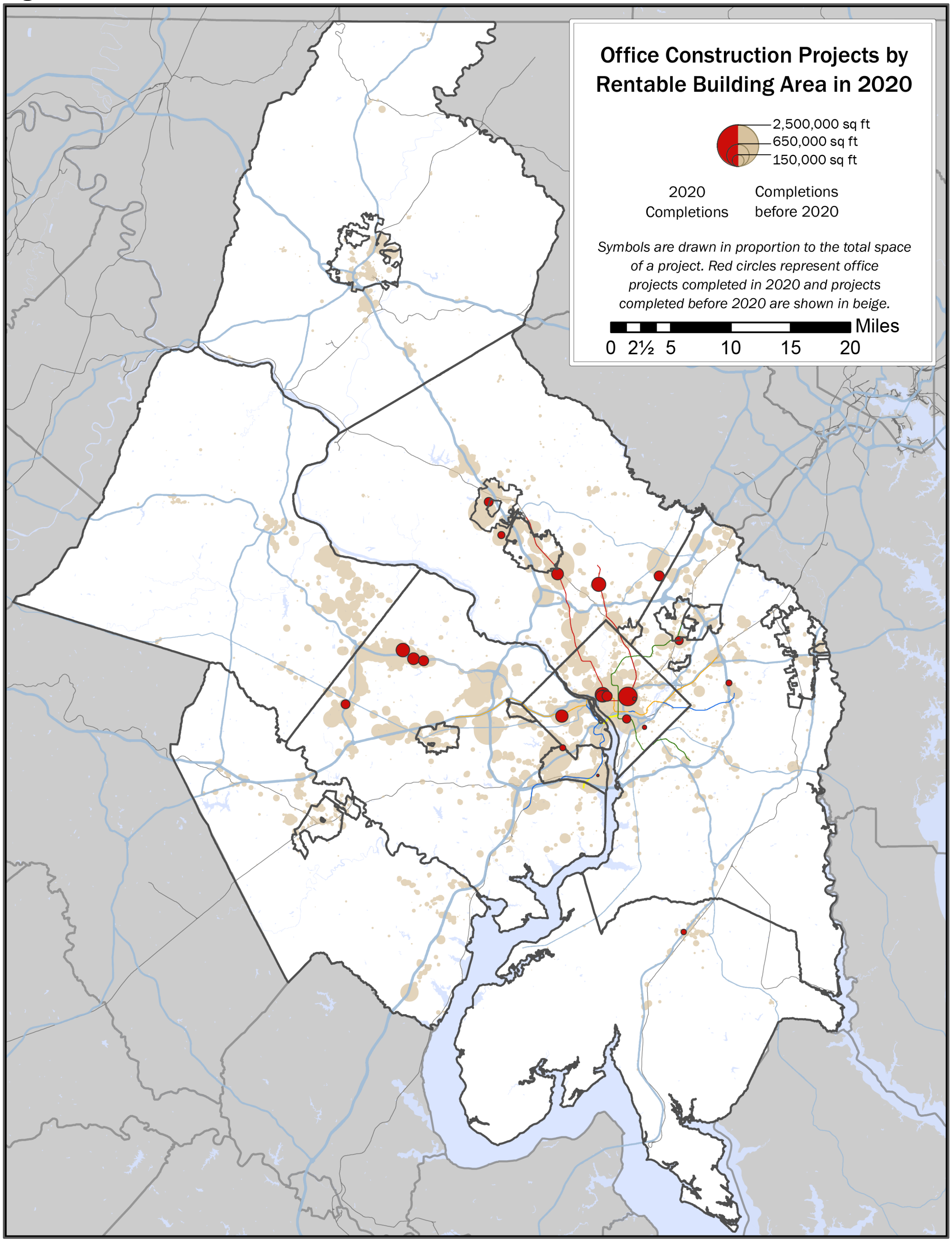
Figure 14. Square Footage of Completed Commercial Construction by Structure Type, 1990 - 2020



Note: This stacked area chart shows cumulative values.

Source: CoStar

Figure 15



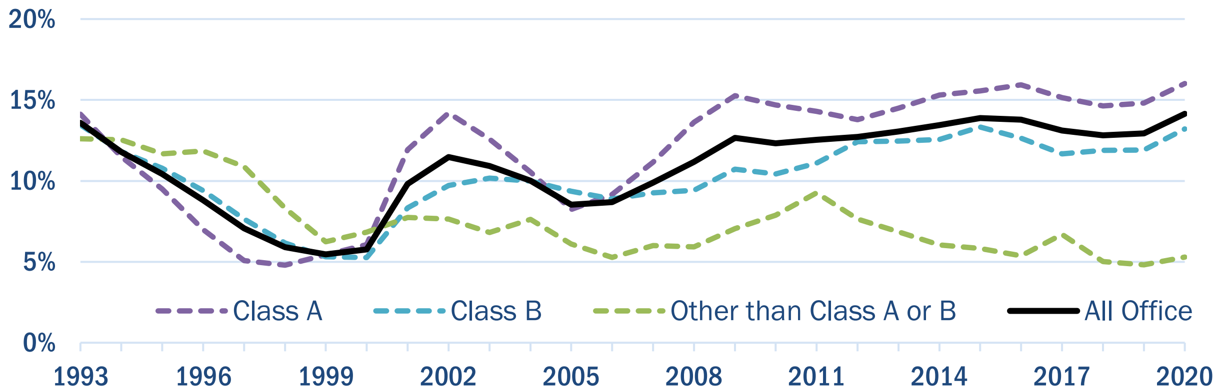
Source: CoStar

Office Construction

Construction of new office space declined 63 percent from 2019 to 2020. Twenty-three new office projects were completed in 2020, with a combined total of 3.8 million new square feet of space—the lowest total since 2012. The 11-story, 545,823 square foot Sentinel Square III office building in the NoMa Activity Center in the District of Columbia was the largest completed office project.

Figure 15 on the previous page maps 2020 office projects. The District of Columbia accounted for 42 percent of new office space. A little over 96 percent of new office construction in the District was within a half-mile walk of a Metro station; outside the District, 45 percent of new office space was in a Metrorail walkshed.

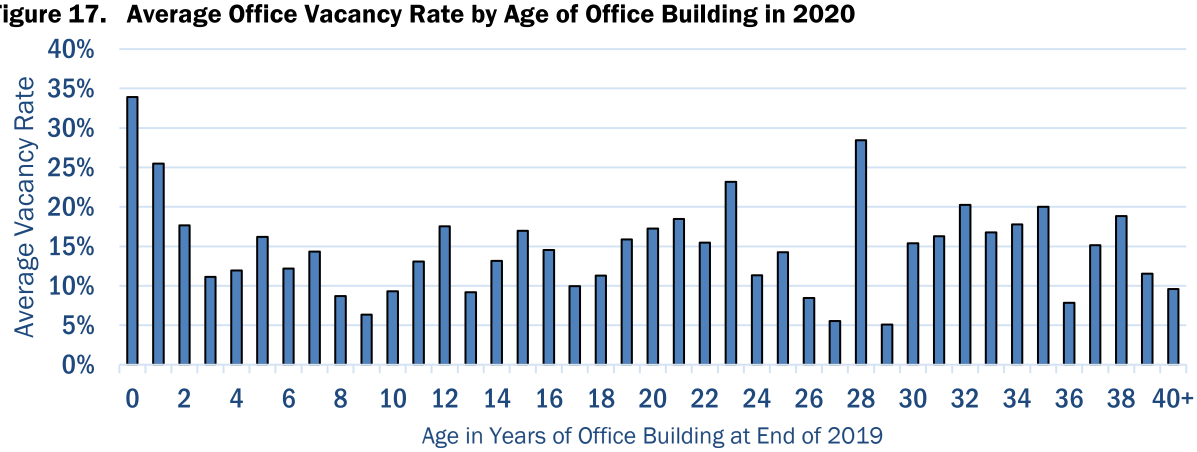
Figure 16. Office Vacancy Rate in the COG Region, 1993 - 2020



Source: CoStar

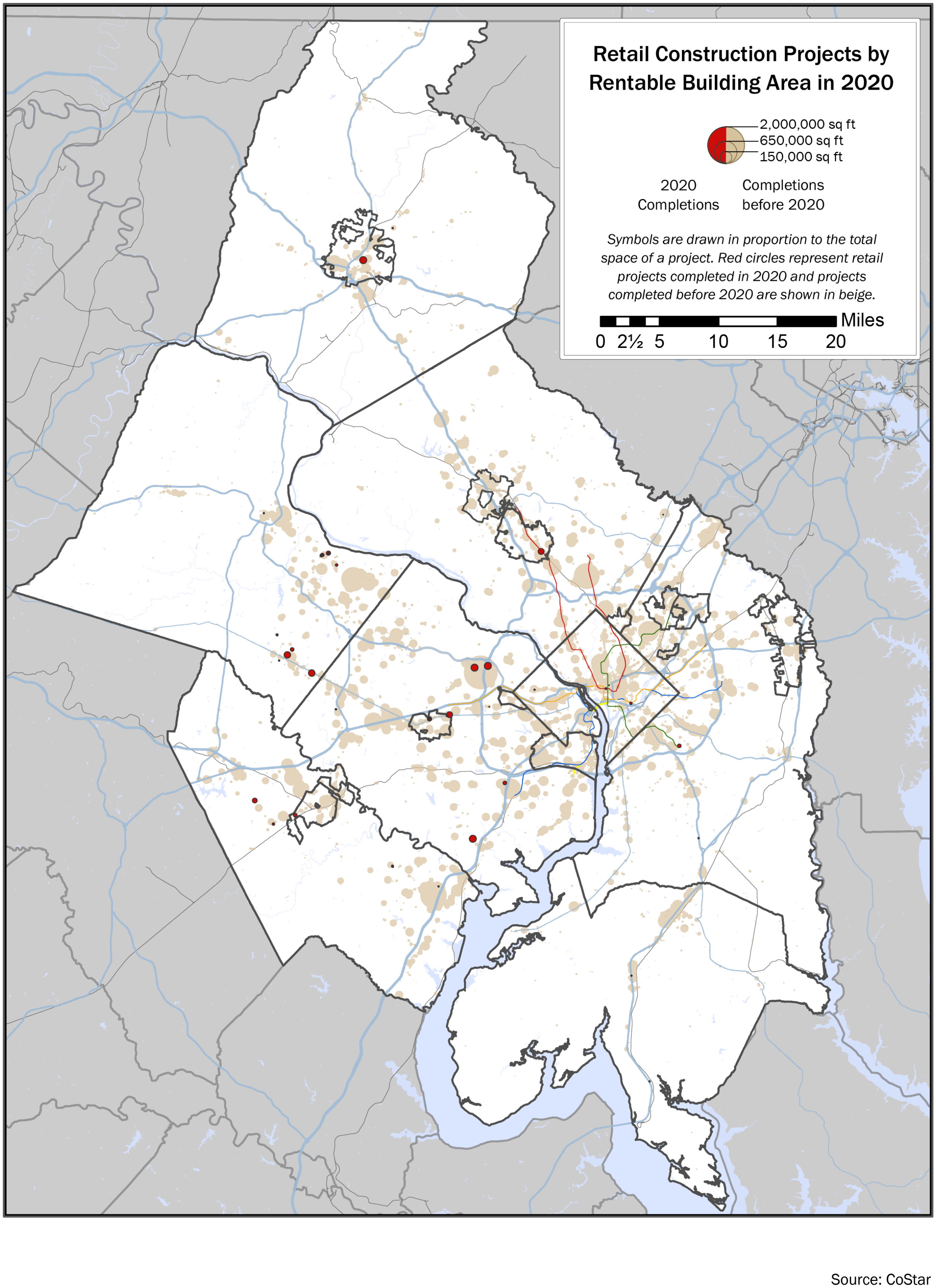
The regional average vacancy rate for office space was just over 14 percent at the end of 2020, the highest recorded office vacancy for the region in the CoStar database (Figure 16). While the COVID-19 quarantine has negatively affected the office market, the changes are modest and consistent with existing trends. Premium and newer office space tend to have higher vacancy, as do office buildings further from the region's core or from transit stations. More than a third of the office space built in 2020 remained empty at year's end. Vacancy data by age of building suggests that it takes two to three years for new buildings to find office tenants (Figure 17).

Figure 17. Average Office Vacancy Rate by Age of Office Building in 2020



Source: CoStar

Figure 18



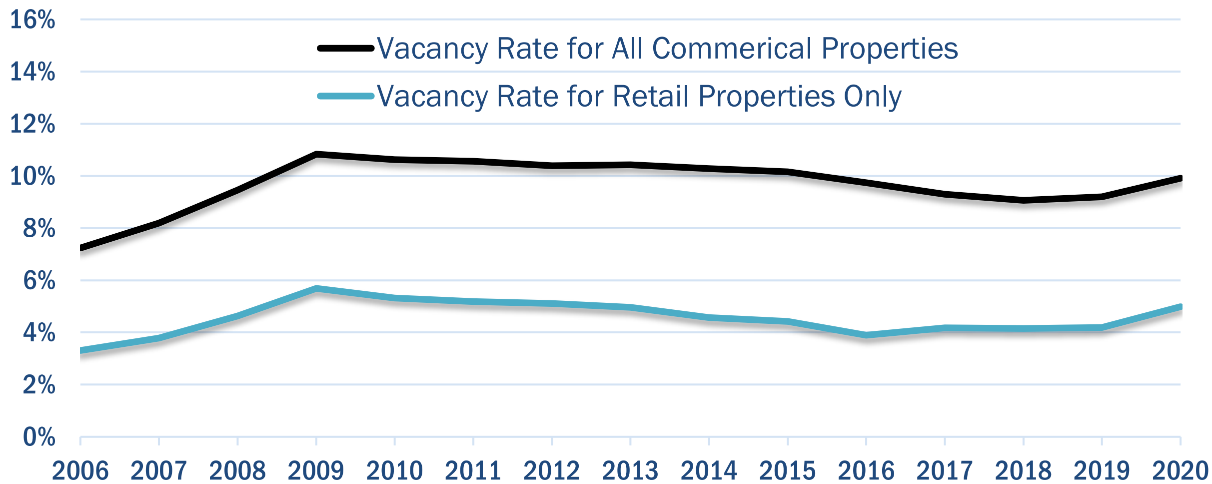
Source: CoStar

Retail Construction

Stand-alone retail construction declined by 22 percent from 2019 to 2020, falling to the fewest delivered square feet of retail space in more than 50 years. Forty-seven new retail projects were completed in 2020 with a combined total of 975,796 square feet of space. The largest project was the retail portion of a mixed-use project in Frederick, Maryland, and added 85,800 square feet of space.

Jurisdictions further from the core of the region have had a higher rates of stand-alone retail construction and only 20 percent of new retail stand-alone retail space was within a half-mile walk of a Metro station in 2020. Many of the new office and apartment buildings near Metro stations have retail space on their first floors, lowering demand for new stand-alone retail space nearby.

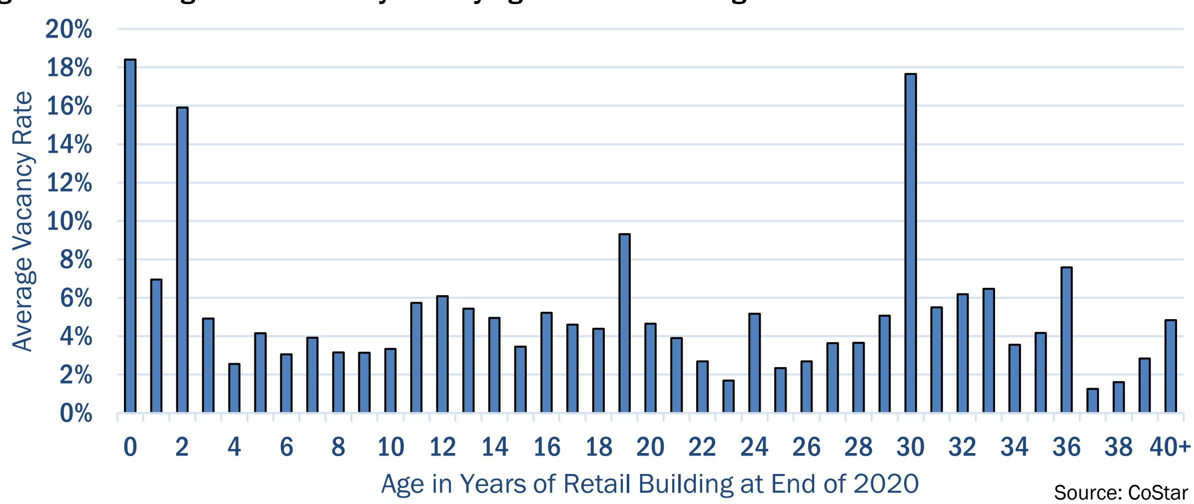
Figure 19. Retail Vacancy Rate in COG Region, 2006 - 2020



Source: CoStar

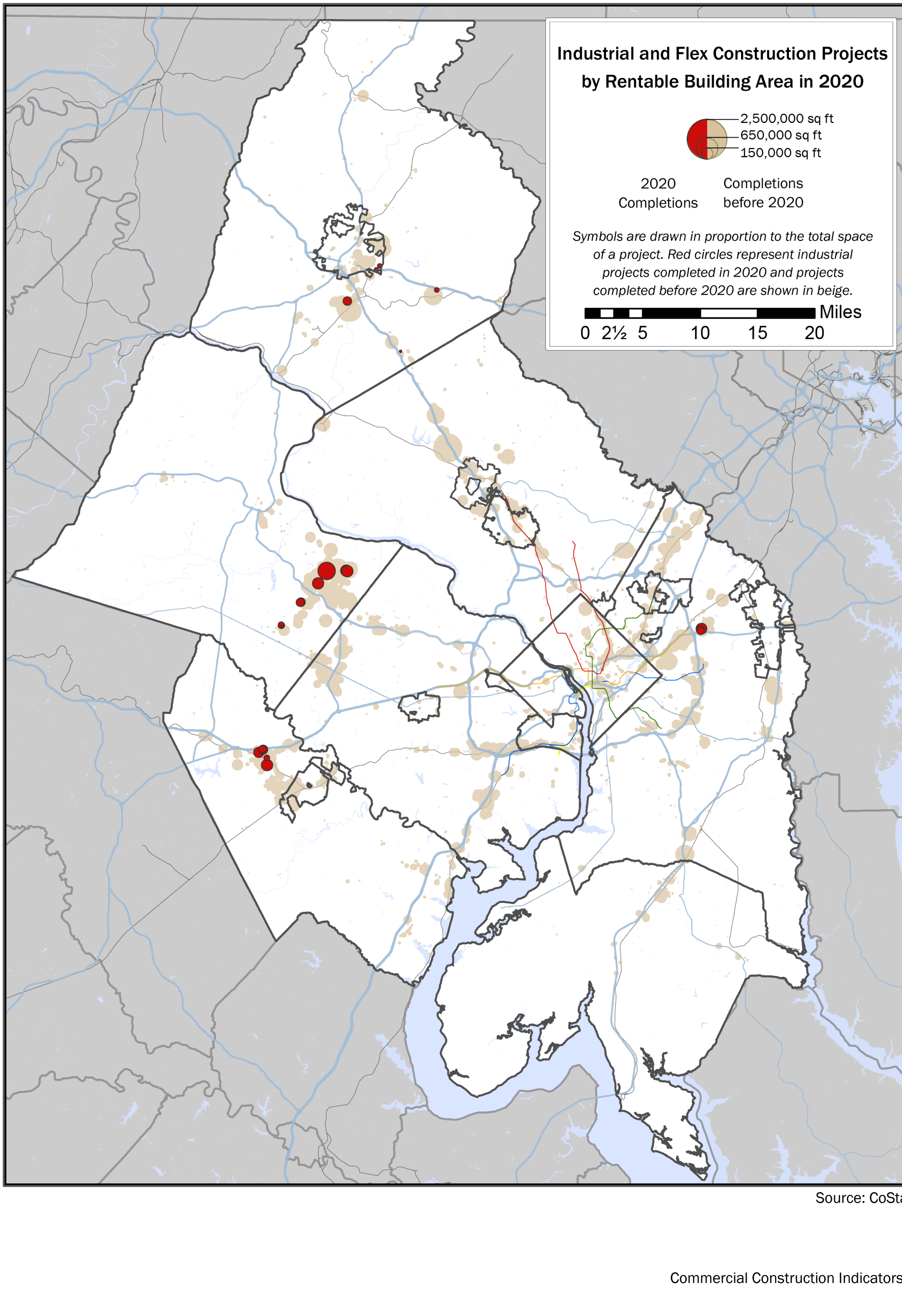
The overall regional vacancy rate for retail space was just over about five percent at the end of 2020. New retail space has a significantly higher rate of vacancy than existing space (Figure 20) and it takes about three years for the average new retail building to match the regional retail vacancy rate.

Figure 20. Average Retail Vacancy Rate by Age of Retail Building in 2020



Source: CoStar

Figure 21

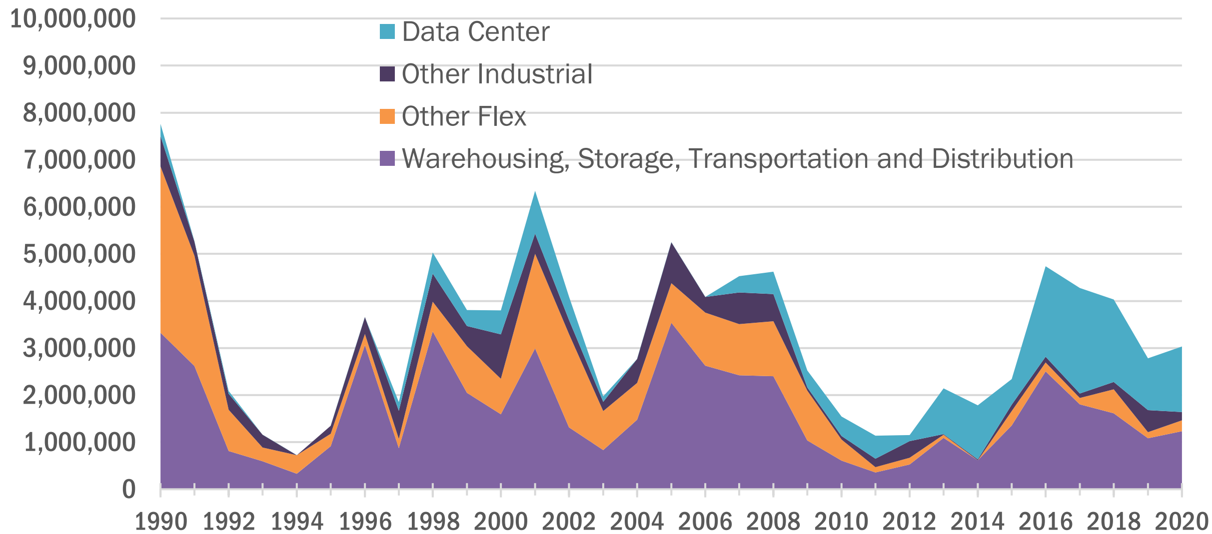


Source: CoStar

Industrial/Flex Construction

Construction of new industrial and flex space declined by 9 percent from 2019 to 2020. In 2020, about 2.9 million square feet of industrial or flex space was completed from 23 projects. The single-story, 510,926 square foot, DC15 data center in Ashburn in Loudoun County was the largest industrial project.

Figure 22. Square Footage of Completed Industrial and Flex Construction by Space Use, 1990 - 2020

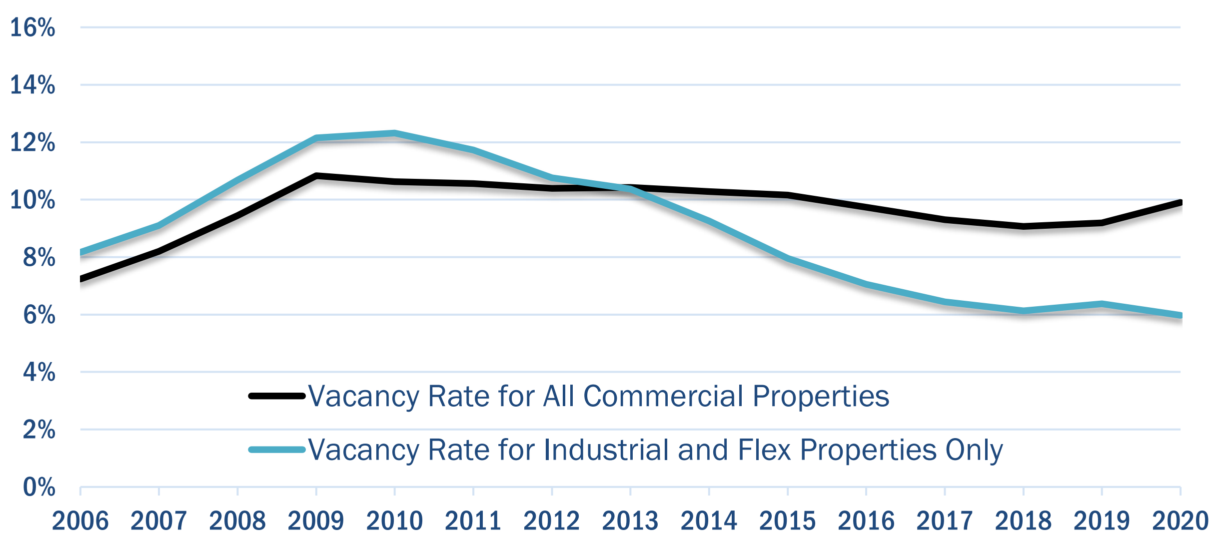


Source: CoStar

Data center construction has increased significantly in recent years and the COG region is the national leader in data center capacity (Figure 22). Loudoun County hosts more data centers than the rest of the COG jurisdictions combined; about 41 percent of all commercial construction in Loudoun County has been for data centers over the past eight years.

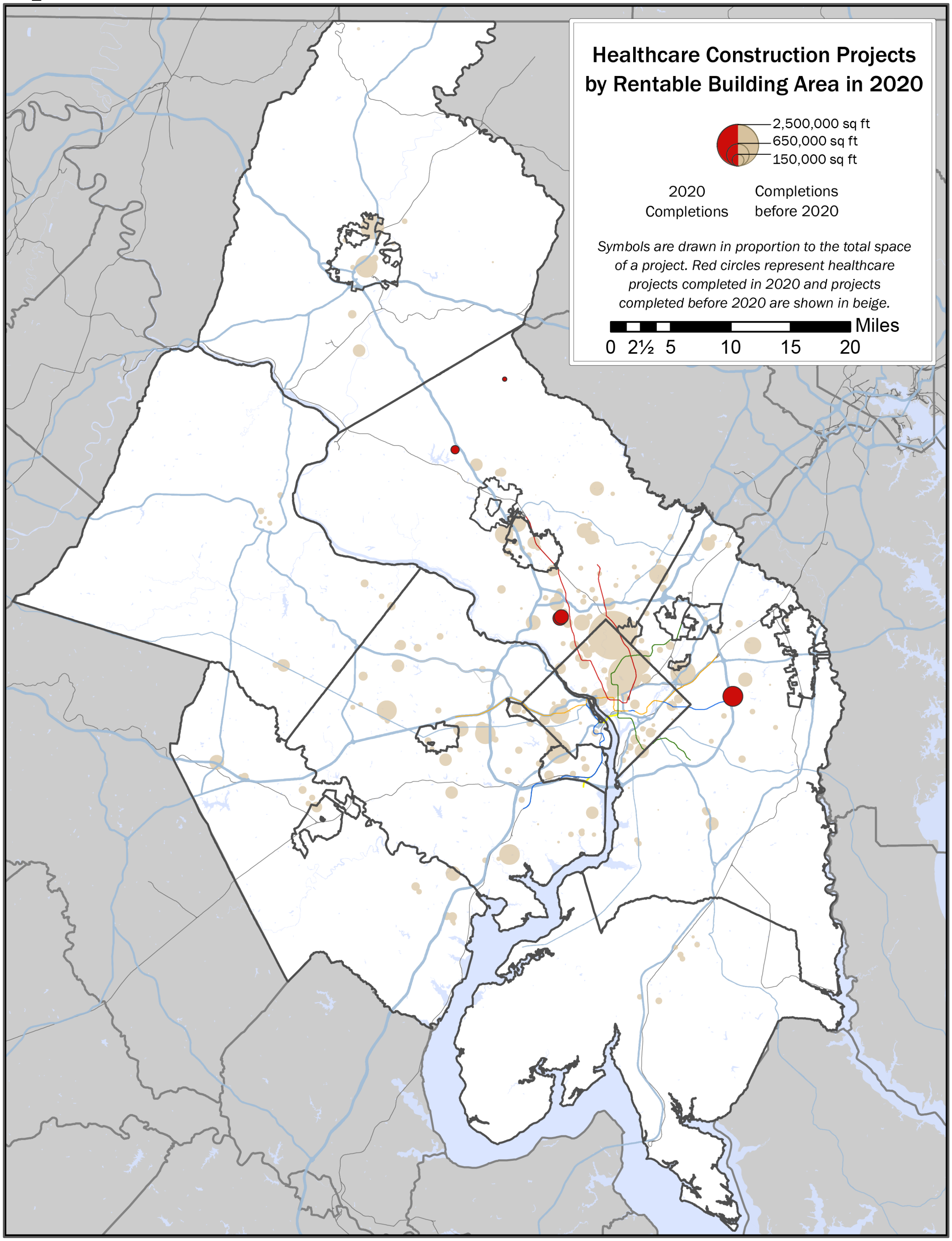
The regional vacancy rate for industrial/flex space was six percent at the end of 2020.

Figure 23. Vacancy Rate for Industrial and Flex Space, 2006 - 2020



Source: CoStar

Figure 24



Source: CoStar

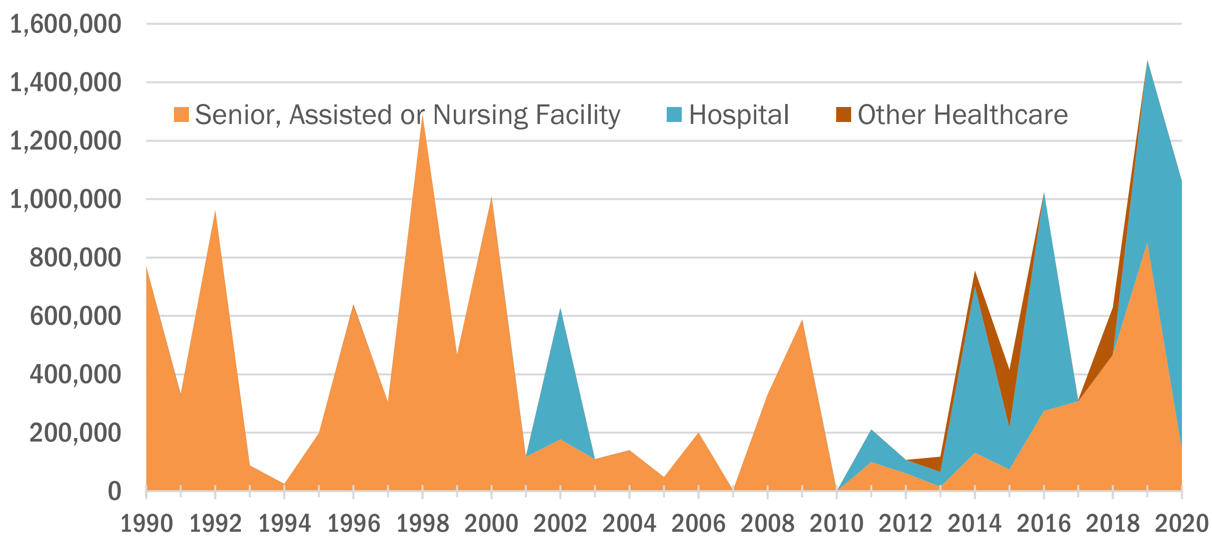
Healthcare Construction

Construction of new healthcare space fell by 66 percent from 2019 to 2020. Five new healthcare projects were completed in 2020, totaling 1.1 million square feet of space.

Figure 24 on the previous page shows new healthcare facilities completed in 2020. Two major hospital buildings were completed in Prince George's and Montgomery Counties, including the largest new project in the region: the 11-story, 620,000 square foot University of Maryland Capital Region Medical Center near the Largo Town Center Metrorail Station.

The COG region has seen a signficant number of new hospital facilities built over the past few years. Since 2011, the District of Columbia, Fairfax County, Loudoun County, Montgomery County, Prince George's County and Prince William County have all added at least one new hospital building.

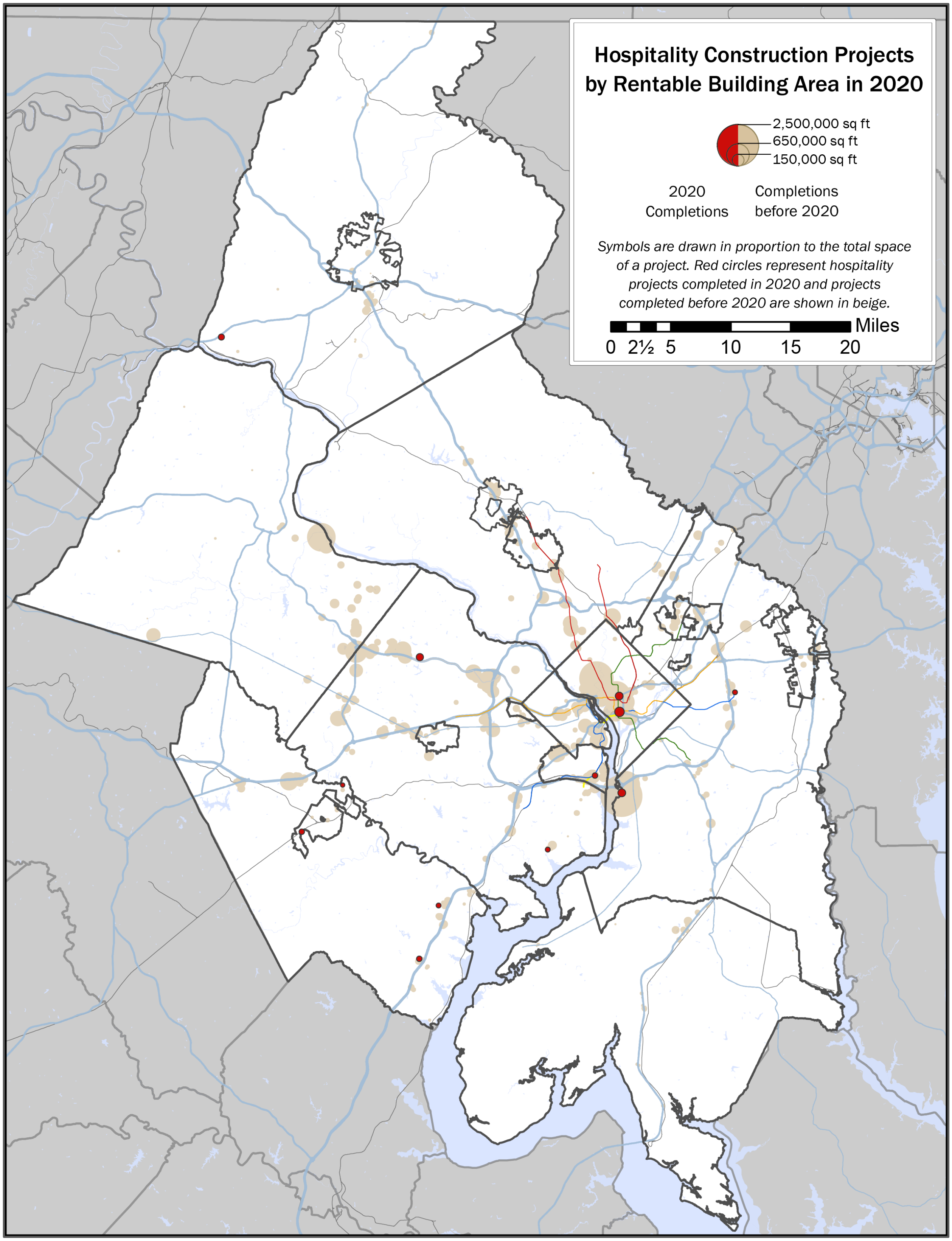
Figure 25. Square Footage of Healthcare Construction by Space Use, 1990 - 2020



Source: CoStar

The largest component of the healthcare sector has historically been properties that specialize in care or assisting living for seniors. During the past ten years, hospitals and health centers were the most common construction subcategory, shown in blue in Figure 25. Primary care and specialty doctor's offices that are located in office, retail or residential buildings are not included in the healthcare category.

Figure 26

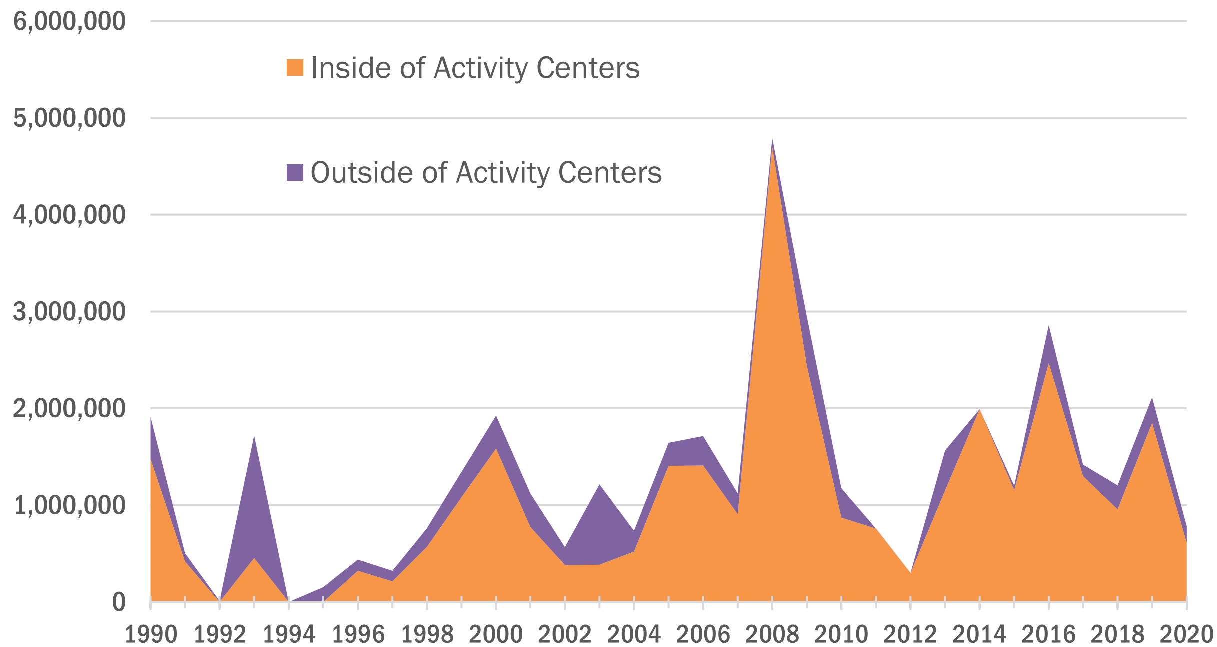


Source: CoStar

Hospitality Construction

Construction of new hospitality space declined 63 percent from 2019 to 2020. Figure 26 on the previous page shows the 12 new hospitality projects completed in 2020, adding 781,370 square feet of hospitality space. The 11-story, 252-room citizenM hotel in the Monumental Core Activity Center in the District of Columbia was the largest project.

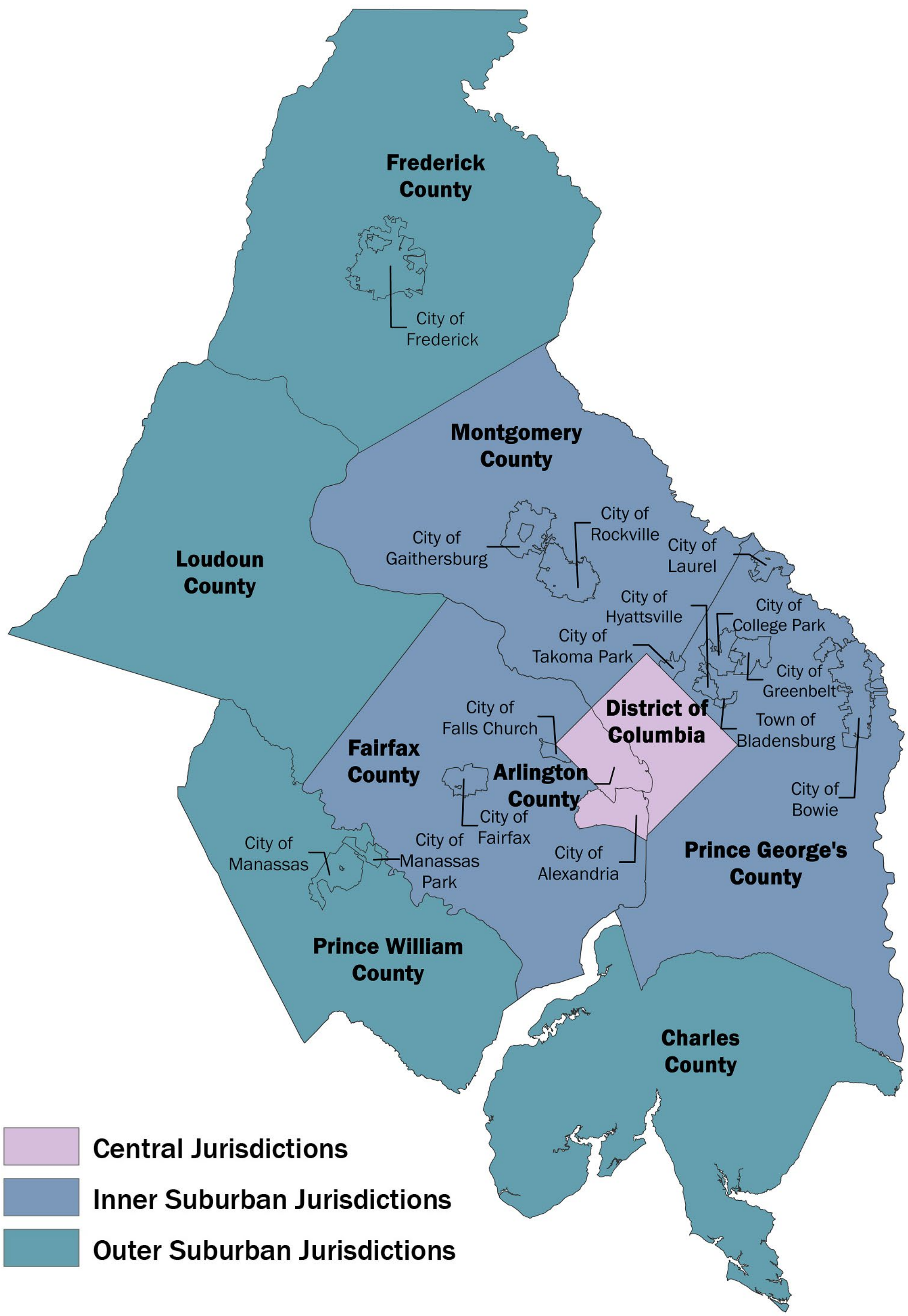
Figure 27. Square Footage of Completed Hospitality Construction in Activity Centers, 1990 - 2020



Source: CoStar

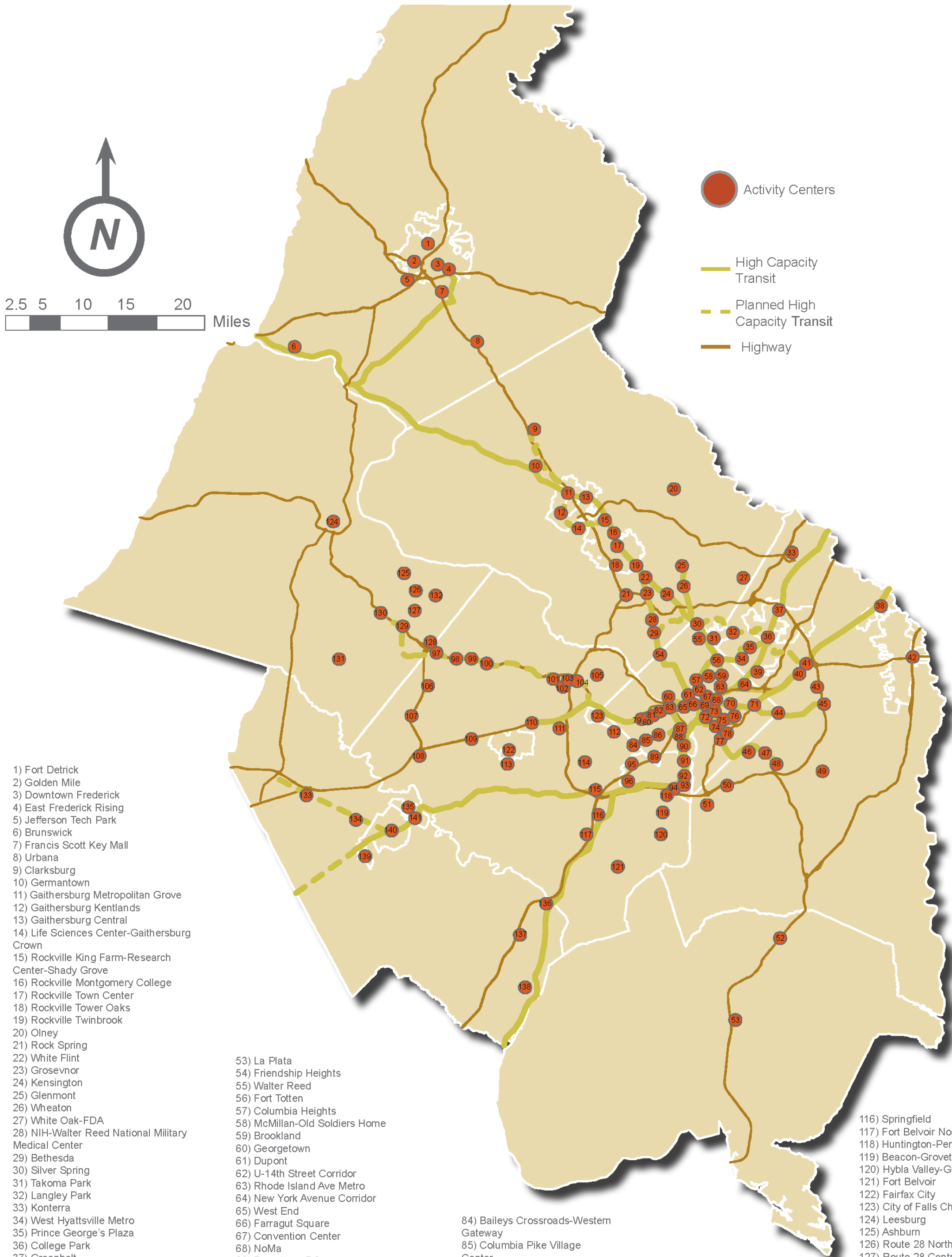
The hospitality sector is highly concentrated in Activity Centers. Figure 27 above shows total hospitality construction, with space inside Activity Centers in orange. The large increase in construction in 2008 was due to the completion of the Gaylord National Resort & Convention Center at National Harbor in Prince George's County. Since 2010, 87 percent of all new hospitality space has been sited inside an Activity Center.

APPENDIX A. MAP OF REGIONAL “RING” JURISDICTIONAL GROUPINGS



APPENDIX B. REGIONAL ACTIVITY CENTERS MAP

Submitted to COG Board for Approval January 13, 2013



1) Fort Detrick
2) Golden Mile
3) Downtown Frederick
4) East Frederick Rising
5) Jefferson Tech Park
6) Brunswick
7) Francis Scott Key Mall
8) Urbana
9) Clarksburg
10) Germantown
11) Gaithersburg Metropolitan Grove
12) Gaithersburg Kentlands
13) Gaithersburg Central
14) Life Sciences Center-Gaithersburg Crown
15) Rockville King Farm-Research Center-Shady Grove
16) Rockville Montgomery College
17) Rockville Town Center
18) Rockville Tower Oaks
19) Rockville Twinbrook
20) Olney
21) Rock Spring
22) White Flint
23) Grosevnor
24) Kensington
25) Glenmont
26) Wheaton
27) White Oak-FDA
28) NIH-Walter Reed National Military Medical Center
29) Bethesda
30) Silver Spring
31) Takoma Park
32) Langley Park
33) Konterra
34) West Hyattsville Metro
35) Prince George's Plaza
36) College Park
37) Greenbelt
38) Bowie MARC
39) Port Towns
40) Landover Metro
41) New Carrollton
42) Bowie Town Center
43) Landover Mall
44) Capitol Heights-Addison Rd
45) Largo Town Center-Morgan Blvd
46) Naylor-Southern Ave
47) Suitland
48) Branch Ave
49) Westphalia
50) Oxon Hill
51) National Harbor
52) Waldorf
53) La Plata
54) Friendship Heights
55) Walter Reed
56) Fort Totten
57) Columbia Heights
58) McMillan-Old Soldiers Home
59) Brookland
60) Georgetown
61) Dupont
62) U-14th Street Corridor
63) Rhode Island Ave Metro
64) New York Avenue Corridor
65) West End
66) Farragut Square
67) Convention Center
68) NoMa
69) Downtown DC
70) H Street
71) Minnesota Ave
72) Monumental Core
73) Capitol Hill
74) Capital Riverfront
75) Southwest Waterfront
76) Stadium Armory
77) St. Elizabeths
78) Poplar Point
79) Ballston
80) Virginia Square
81) Clarendon
82) Courthouse
83) Rosslyn
84) Baileys Crossroads-Western Gateway
85) Columbia Pike Village Center
86) Columbia Pike Town Center
87) Pentagon
88) Pentagon City
89) Shirlington
90) Crystal City
91) Potomac Yard
92) Braddock Road Metro Area
93) King Street-Old Town
94) Carlyle-Eisenhower East
95) Beauregard
96) Landmark-Van Dorn
97) Fairfax Innovation Center
98) Herndon
99) Reston Town Center
100) Wiehle-Reston East
101) Tysons West
102) Tysons Central 7
103) Tysons Central 123
104) Tysons East
105) McLean
106) Dulles East
107) Dulles South
108) Centreville
109) Fairfax Center
110) Vienna
111) Dunn Loring-Merrifield
112) Seven Corners
113) George Mason University
114) Annandale
115) Beltway South
116) Springfield
117) Fort Belvoir North Area
118) Huntington-Penn Daw
119) Beacon-Groveton
120) Hybla Valley-Gum Springs
121) Fort Belvoir
122) Fairfax City
123) City of Falls Church
124) Leesburg
125) Ashburn
126) Route 28 North
127) Route 28 Central
128) Route 28 South
129) Ashburn Station
130) Loudoun Gateway Station
131) Arcola
132) Dulles Town Center
133) Gainesville
134) Innovation
135) Yorkshire
136) North Woodbridge
137) Potomac Town Center
138) Potomac Shores
139) City of Manassas Regional Airpc
140) City of Manassas
141) Manassas Park

APPENDIX C. ACTIVITY CENTER TOTALS

Activity Center	Built Prior to 2020			2020 Completions			2020 Year End Vacancy Rate		
	Buildings	Square Feet	Share	Buildings	Square Feet	Share	Office	Retail	Industrial/Flex
Annandale	192	2,720,326	0.2%	0	0	0.0%	14.7%	0.6%	0.0%
Arcola	25	1,497,507	0.1%	2	90,400	0.8%	15.7%	8.3%	2.9%
Ashburn	81	3,394,860	0.3%	8	101,175	0.9%	9.5%	8.5%	3.6%
Ashburn Station	82	7,563,691	0.6%	0	0	0.0%	4.4%	5.5%	6.2%
Baileys Crossroads-Western Gateway	179	6,951,984	0.6%	0	0	0.0%	36.1%	3.1%	1.3%
Ballston	65	9,787,057	0.8%	1	240,000	2.2%	24.1%	0.0%	0.0%
Beacon-Groveton	38	786,638	0.1%	0	0	0.0%	0.0%	0.0%	0.0%
Beauregard	53	5,743,948	0.5%	1	54,087	0.5%	14.6%	2.4%	0.0%
Beltway South	106	5,792,323	0.5%	0	0	0.0%	20.4%	0.2%	4.2%
Bethesda	426	12,360,967	1.1%	0	0	0.0%	18.7%	5.7%	0.0%
Bowie MARC	1	9,222	0.0%	0	0	0.0%	--	--	--
Bowie Town Center	122	4,943,232	0.4%	0	0	0.0%	13.4%	7.0%	19.0%
Braddock Road Metro Area	447	6,483,270	0.6%	2	60,375	0.6%	14.2%	2.8%	6.2%
Branch Ave	33	1,420,380	0.1%	0	0	0.0%	28.2%	0.3%	0.0%
Brookland	193	2,353,346	0.2%	0	0	0.0%	0.2%	1.8%	0.0%
Brunswick	38	415,006	0.0%	1	56,012	0.5%	39.6%	10.4%	0.0%
Capitol Heights-Addison Rd	131	919,411	0.1%	0	0	0.0%	0.0%	5.0%	15.9%
Capitol Hill	290	6,164,421	0.5%	0	0	0.0%	8.5%	6.7%	2.4%
Capitol Riverfront	206	3,284,928	0.3%	0	0	0.0%	2.2%	6.9%	0.0%
Carlyle-Eisenhower East	103	6,768,615	0.6%	0	0	0.0%	10.7%	7.2%	0.3%
Centreville	82	2,389,261	0.2%	0	0	0.0%	9.8%	3.9%	--
City of Falls Church	278	4,336,843	0.4%	0	0	0.0%	7.7%	7.1%	0.0%
City of Manassas	579	8,276,585	0.7%	0	0	0.0%	4.3%	6.0%	4.7%
City of Manassas Regional Airport	73	2,270,877	0.2%	1	20,000	0.2%	4.5%	17.0%	0.8%
Clarendon	81	2,546,875	0.2%	0	0	0.0%	26.4%	11.8%	0.0%
Clarksburg	46	2,104,467	0.2%	0	0	0.0%	7.0%	0.5%	41.2%
College Park	31	2,226,107	0.2%	1	111,276	1.0%	13.0%	4.3%	10.8%
Columbia Heights	460	3,497,394	0.3%	0	0	0.0%	1.7%	5.5%	0.0%
Columbia Pike Town Center	57	1,299,021	0.1%	0	0	0.0%	8.7%	3.5%	--
Columbia Pike Village Center	33	288,550	0.0%	0	0	0.0%	0.0%	17.9%	--
Courthouse	70	5,069,807	0.4%	0	0	0.0%	18.4%	0.0%	--
Crystal City	96	16,071,327	1.4%	0	0	0.0%	16.8%	0.0%	0.0%

Activity Center	Built Prior to 2020			2020 Completions			2020 Year End Vacancy Rate		
	Buildings	Square Feet	Share	Buildings	Square Feet	Share	Office	Retail	Industrial/Flex
Downtown DC	500	38,881,718	3.3%	3	109,886	1.0%	12.9%	11.3%	0.0%
Downtown Frederick	676	5,894,822	0.5%	0	0	0.0%	5.8%	5.8%	9.5%
Dulles East	81	7,490,804	0.6%	0	0	0.0%	8.1%	4.6%	8.1%
Dulles South	389	22,181,959	1.9%	3	135,400	1.3%	17.5%	2.8%	7.8%
Dulles Town Center	167	7,663,372	0.7%	2	432,400	4.0%	25.3%	7.6%	3.4%
Dunn Loring-Merrifield	284	16,386,607	1.4%	0	0	0.0%	13.4%	3.6%	6.6%
Dupont	703	18,796,266	1.6%	0	0	0.0%	15.6%	6.9%	5.4%
East Frederick Rising	195	3,642,320	0.3%	3	95,162	0.9%	13.7%	1.6%	5.2%
Fairfax Center	151	12,942,127	1.1%	0	0	0.0%	25.1%	1.5%	0.0%
Fairfax City	511	9,723,000	0.8%	6	108,608	1.0%	9.8%	4.4%	6.5%
Fairfax Innovation Center	50	6,762,555	0.6%	0	0	0.0%	21.5%	0.0%	0.0%
Farragut Square	448	65,493,764	5.6%	3	407,129	3.8%	16.5%	3.2%	--
Fort Belvoir	9	668,762	0.1%	0	0	0.0%	0.0%	0.0%	--
Fort Belvoir North Area	278	10,063,830	0.9%	0	0	0.0%	43.2%	0.5%	8.8%
Fort Detrick	33	645,483	0.1%	0	0	0.0%	0.7%	0.3%	--
Fort Totten	37	818,928	0.1%	0	0	0.0%	0.0%	0.0%	3.8%
Francis Scott Key Mall	328	10,146,317	0.9%	0	0	0.0%	21.9%	2.3%	5.2%
Friendship Heights	201	7,527,217	0.6%	1	236,000	2.2%	14.9%	8.4%	0.0%
Gainesville	101	3,267,369	0.3%	0	0	0.0%	21.7%	1.4%	16.7%
Gaithersburg Central	202	3,508,604	0.3%	0	0	0.0%	10.9%	2.6%	3.4%
Gaithersburg Kentlands	118	3,417,367	0.3%	0	0	0.0%	0.7%	4.4%	0.0%
Gaithersburg Metropolitan Grove	35	2,737,013	0.2%	0	0	0.0%	13.4%	0.0%	2.9%
George Mason University	2	339,133	0.0%	0	0	0.0%	--	--	--
Georgetown	330	3,591,246	0.3%	0	0	0.0%	13.2%	8.0%	0.0%
Germantown	187	8,576,394	0.7%	2	175,054	1.6%	18.2%	0.5%	3.2%
Glenmont	20	284,986	0.0%	0	0	0.0%	--	2.7%	--
Golden Mile	161	3,328,482	0.3%	0	0	0.0%	1.1%	25.6%	4.0%
Greenbelt	15	150,309	0.0%	0	0	0.0%	2.5%	0.0%	0.0%
Grosvenor	0	0	0.0%	0	0	0.0%	--	--	--
H Street	297	1,752,239	0.2%	0	0	0.0%	8.6%	6.0%	0.0%
Herndon	104	8,906,423	0.8%	0	0	0.0%	15.1%	10.0%	24.6%
Huntington-Penn Daw	57	1,019,814	0.1%	0	0	0.0%	21.6%	0.7%	--
Hybla Valley-Gum Springs	66	1,472,223	0.1%	0	0	0.0%	0.0%	5.7%	0.0%
Innovation	36	1,824,977	0.2%	0	0	0.0%	7.0%	1.6%	8.2%
Jefferson Tech Park	35	480,519	0.0%	0	0	0.0%	23.0%	0.0%	0.0%
Kensington	210	2,365,658	0.2%	0	0	0.0%	6.2%	1.2%	8.9%

Activity Center	Built Prior to 2020			2020 Completions			2020 Year End Vacancy Rate		
	Buildings	Square Feet	Share	Buildings	Square Feet	Share	Office	Retail	Industrial/Flex
King Street-Old Town	591	8,517,853	0.7%	0	0	0.0%	9.8%	3.2%	0.0%
Konterra	44	3,353,731	0.3%	0	0	0.0%	17.5%	5.1%	10.4%
La Plata	165	1,981,966	0.2%	1	4,400	0.0%	5.5%	2.2%	11.8%
Landmark-Van Dorn	142	6,944,470	0.6%	0	0	0.0%	63.5%	29.4%	5.0%
Landover Mall	87	3,734,291	0.3%	1	60,000	0.6%	2.1%	10.9%	1.2%
Landover Metro	135	6,829,280	0.6%	0	0	0.0%	0.0%	6.4%	8.4%
Langley Park	59	1,122,033	0.1%	0	0	0.0%	24.3%	5.3%	--
Largo Town Center-Morgan Blvd	205	6,014,946	0.5%	1	620,000	5.8%	0.7%	4.4%	6.1%
Leesburg	452	5,390,760	0.5%	1	4,000	0.0%	4.8%	5.6%	0.0%
Life Sciences Center-Gaithersburg Crown	120	9,118,221	0.8%	2	90,584	0.8%	10.6%	0.0%	0.0%
Loudoun Gateway Station	4	756,303	0.1%	0	0	0.0%	--	0.0%	0.0%
Manassas Park	124	2,217,820	0.2%	0	0	0.0%	10.4%	0.8%	3.4%
McLean	179	2,644,621	0.2%	0	0	0.0%	11.9%	2.6%	0.0%
McMillan-Old Soldiers Home	61	3,662,498	0.3%	0	0	0.0%	0.0%	3.3%	--
Minnesota Ave	188	1,540,681	0.1%	0	0	0.0%	2.6%	5.0%	0.9%
Monumental Core	52	13,654,584	1.2%	1	150,000	1.4%	7.2%	0.0%	0.0%
National Harbor	20	5,481,809	0.5%	1	100,000	0.9%	34.8%	0.0%	--
Naylor-Southern Ave	60	1,131,192	0.1%	0	0	0.0%	1.5%	0.7%	0.0%
New Carrollton	170	5,498,419	0.5%	0	0	0.0%	12.7%	5.5%	4.3%
New York Avenue Corridor	267	5,996,156	0.5%	0	0	0.0%	0.0%	1.6%	11.9%
NIH-Walter Reed Nat'l Mil Medical Ctr	7	107,551	0.0%	0	0	0.0%	0.0%	0.0%	--
NoMa	482	15,487,468	1.3%	3	731,823	6.8%	4.8%	11.3%	1.7%
North Woodbridge	140	1,575,373	0.1%	0	0	0.0%	6.3%	5.3%	0.0%
Olney	109	1,682,807	0.1%	0	0	0.0%	5.7%	5.4%	0.0%
Oxon Hill	91	1,737,972	0.1%	0	0	0.0%	26.6%	2.3%	0.0%
Pentagon	1	218,240	0.0%	0	0	0.0%	--	--	--
Pentagon City	18	3,560,762	0.3%	0	0	0.0%	3.7%	1.4%	--
Poplar Point	203	1,671,314	0.1%	1	27,650	0.3%	2.1%	2.0%	4.8%
Port Towns	390	4,285,738	0.4%	0	0	0.0%	4.0%	4.4%	6.3%
Potomac Shores	18	420,039	0.0%	0	0	0.0%	0.0%	22.0%	0.0%
Potomac Town Center	106	4,985,103	0.4%	1	36,968	0.3%	4.2%	1.2%	0.0%
Potomac Yard	156	2,254,901	0.2%	0	0	0.0%	0.0%	0.8%	0.0%
Prince George's Plaza	35	2,720,174	0.2%	0	0	0.0%	18.1%	11.9%	--
Reston Town Center	115	13,793,129	1.2%	1	276,000	2.6%	13.9%	2.8%	0.0%
Rhode Island Ave Metro	144	2,648,740	0.2%	0	0	0.0%	0.0%	8.8%	10.9%
Rock Spring	64	7,479,311	0.6%	0	0	0.0%	14.0%	12.5%	--
Rockville King Farm-Research Ctr-Shady Grove	76	1,720,953	0.1%	0	0	0.0%	8.3%	5.6%	3.6%
Rockville Montgomery College	137	3,618,513	0.3%	0	0	0.0%	17.4%	3.5%	4.9%

Activity Center	Built Prior to 2020			2020 Completions			2020 Year End Vacancy Rate		
	Buildings	Square Feet	Share	Buildings	Square Feet	Share	Office	Retail	Industrial/Flex
Rockville Tower Oaks	11	930,265	0.1%	0	0	0.0%	30.2%	0.0%	0.0%
Rockville Town Center	205	4,861,866	0.4%	0	0	0.0%	11.1%	4.5%	5.1%
Rockville Twinbrook	236	8,265,324	0.7%	1	56,719	0.5%	9.2%	4.4%	8.9%
Rosslyn	61	11,887,632	1.0%	0	0	0.0%	18.5%	5.0%	--
Route 28 Central	145	9,473,017	0.8%	0	0	0.0%	12.5%	1.1%	4.0%
Route 28 North	1	0	0.0%	0	0	0.0%	--	--	--
Route 28 South	118	5,287,299	0.5%	0	0	0.0%	24.3%	3.2%	6.1%
Seven Corners	68	2,556,355	0.2%	0	0	0.0%	16.9%	13.6%	--
Shirlington	16	976,695	0.1%	0	0	0.0%	4.3%	8.8%	--
Silver Spring	390	11,193,387	1.0%	0	0	0.0%	17.1%	4.6%	1.5%
Southwest Waterfront	69	4,897,851	0.4%	1	118,000	1.1%	12.6%	0.0%	0.0%
Springfield	130	5,485,283	0.5%	1	23,580	0.2%	12.1%	1.6%	0.0%
St. Elizabeth's	31	659,655	0.1%	0	0	0.0%	0.0%	0.0%	0.0%
Stadium Armory	110	1,196,498	0.1%	0	0	0.0%	0.6%	1.4%	7.6%
Suitland	88	721,364	0.1%	0	0	0.0%	2.2%	2.4%	0.0%
Takoma Park	105	973,183	0.1%	0	0	0.0%	5.0%	1.9%	0.0%
Tysons Central 123	144	18,479,920	1.6%	0	0	0.0%	15.9%	1.5%	--
Tysons Central 7	43	6,442,664	0.6%	1	79,000	0.7%	23.1%	3.9%	--
Tysons East	32	6,104,880	0.5%	1	80,000	0.7%	10.3%	0.0%	0.0%
Tysons West	94	6,395,466	0.5%	0	0	0.0%	25.1%	7.9%	7.1%
U-14th Street Corridor	588	6,821,658	0.6%	1	50,000	0.5%	6.4%	6.1%	11.3%
Urbana	89	1,198,387	0.1%	1	10,320	0.1%	0.9%	7.4%	5.4%
Vienna	2	437,823	0.0%	0	0	0.0%	3.0%	--	--
Virginia Square	54	2,247,748	0.2%	0	0	0.0%	17.1%	1.4%	0.0%
Waldorf	414	7,982,791	0.7%	1	51,000	0.5%	9.8%	9.9%	5.6%
Walter Reed	134	4,959,113	0.4%	0	0	0.0%	9.6%	2.1%	0.0%
West End	117	16,749,903	1.4%	2	526,000	4.9%	11.3%	1.0%	--
West Hyattsville Metro	61	865,108	0.1%	0	0	0.0%	2.5%	1.7%	0.0%
Westphalia	21	939,087	0.1%	0	0	0.0%	0.0%	0.0%	25.8%
Wheaton	186	3,067,111	0.3%	1	308,000	2.9%	9.5%	3.2%	0.0%
White Flint	162	7,403,806	0.6%	2	315,625	2.9%	18.9%	6.9%	10.5%
White Oak-FDA	117	5,757,219	0.5%	1	169,000	1.6%	17.6%	0.2%	8.2%
Wiehle-Reston East	136	9,486,810	0.8%	4	548,899	5.1%	19.2%	0.0%	1.5%
Yorkshire	98	822,933	0.1%	1	30,000	0.3%	3.9%	1.7%	6.4%
Inside of Activity Centers Total	*21,407*	*773,578,676*	*66.5%*	*73*	*6,900,532*	*64.0%*	*14.7%*	*5.4%*	*6.6%*
Outside of Activity Centers Total	*17,137*	*390,339,842*	*33.5%*	*51*	*3,881,004*	*36.0%*	*12.0%*	*4.7%*	*5.4%*
Regional Total	**38,544**	**1,163,918,518**	**100.0%**	**124**	**10,781,536**	**100.0%**	**14.2%**	**5.1%**	**6.0%**

Source: CoStar, COG

APPENDIX D. METRO STATION WALKSHED TOTALS

Metrorail Station Half-Mile Walkshed	Built Prior to 2020			2020 Completions			Percent Built Since Station Opened	2020 Year End Vacancy Rate
	Buildings	Square Feet	Share	Buildings	Square Feet	Share		
Addison Road-Seat Pleasant	22	217,261	0.0%	0	0	0.0%	82.8%	2.5%
Anacostia	61	754,576	0.1%	0	0	0.0%	33.9%	0.2%
Archives-Navy Mem-Penn Qtr	151	18,698,382	1.6%	1	5,932	0.1%	63.3%	13.2%
Arlington Cemetery	0	0	0.0%	0	0	0.0%	--	--
Ballston-MU	81	10,941,182	0.9%	1	240,000	2.2%	90.3%	21.6%
Benning Road	29	323,112	0.0%	0	0	0.0%	57.0%	0.0%
Bethesda	321	10,508,217	0.9%	0	0	0.0%	55.3%	15.9%
Braddock Road	61	916,834	0.1%	0	0	0.0%	70.0%	9.2%
Branch Avenue	5	212,343	0.0%	1	21,000	0.2%	33.4%	1.5%
Brookland-CUA	113	1,294,786	0.1%	0	0	0.0%	29.5%	1.0%
Capitol Heights	66	375,720	0.0%	0	0	0.0%	23.2%	6.5%
Capitol South	106	2,126,775	0.2%	0	0	0.0%	15.0%	2.6%
Cheverly	19	141,818	0.0%	0	0	0.0%	10.4%	0.0%
Clarendon	146	3,463,650	0.3%	0	0	0.0%	70.6%	19.7%
Cleveland Park	37	379,444	0.0%	0	0	0.0%	0.0%	5.3%
College Park-Univ of Maryland	33	715,969	0.1%	0	0	0.0%	11.3%	1.9%
Columbia Heights	196	1,902,195	0.2%	1	50,000	0.5%	43.7%	5.1%
Congress Heights	17	351,668	0.0%	0	0	0.0%	74.7%	0.0%
Court House	96	5,999,923	0.5%	0	0	0.0%	81.9%	21.0%
Crystal City	72	10,222,802	0.9%	0	0	0.0%	56.7%	14.4%
Deanwood	67	678,803	0.1%	0	0	0.0%	19.1%	0.0%
Dunn Loring-Merrifield	22	1,254,141	0.1%	0	0	0.0%	74.3%	24.0%
Dupont Circle	627	27,763,435	2.4%	2	547,228	5.1%	39.9%	15.9%
East Falls Church	6	183,905	0.0%	0	0	0.0%	62.5%	0.0%
Eastern Market	320	2,491,436	0.2%	0	0	0.0%	20.1%	9.8%
Eisenhower Avenue	18	3,673,798	0.3%	0	0	0.0%	76.5%	14.6%
Farragut North	484	55,168,023	4.7%	4	893,129	8.3%	52.0%	16.9%
Farragut West	442	54,984,767	4.7%	3	557,129	5.2%	51.5%	14.7%
Federal Center SW	23	7,880,037	0.7%	1	150,000	1.4%	73.1%	4.2%
Federal Triangle	103	20,132,119	1.7%	1	5,932	0.1%	69.0%	14.5%
Foggy Bottom-GWU	155	21,554,536	1.9%	2	526,000	4.9%	60.8%	14.7%
Forest Glen	10	129,558	0.0%	0	0	0.0%	0.0%	3.6%
Fort Totten	19	232,133	0.0%	0	0	0.0%	20.7%	11.0%
Franconia-Springfield	0	0	0.0%	0	0	0.0%	--	--
Friendship Heights	94	5,359,745	0.5%	1	236,000	2.2%	57.1%	14.7%

Metrorail Station Half-Mile Walkshed	Built Prior to 2020			2020 Completions			Percent Built Since Station Opened	2020 Year End Vacancy Rate
	Buildings	Units	Share	Buildings	Units	Share		
Gallery Place-Chinatown	363	44,197,602	3.8%	3	109,886	1.0%	76.7%	13.5%
Georgia Ave-Petworth	226	1,517,760	0.1%	0	0	0.0%	16.4%	2.3%
Glenmont	18	255,294	0.0%	0	0	0.0%	35.1%	2.7%
Greenbelt	0	0	0.0%	0	0	0.0%	--	--
Greensboro	39	4,132,669	0.4%	1	79,000	0.7%	16.4%	12.5%
Grosvenor-Strathmore	0	0	0.0%	0	0	0.0%	--	--
Huntington	12	181,536	0.0%	0	0	0.0%	9.4%	8.7%
Judiciary Square	263	22,155,646	1.9%	2	6,886	0.1%	70.2%	12.5%
King Street-Old Town	266	7,162,739	0.6%	2	60,375	0.6%	89.0%	6.6%
Landover	7	599,230	0.1%	0	0	0.0%	24.8%	--
Largo Town Center	21	820,101	0.1%	1	620,000	5.8%	76.0%	1.9%
L'Enfant Plaza	40	12,341,829	1.1%	1	150,000	1.4%	72.9%	11.1%
McLean	19	4,517,595	0.4%	1	80,000	0.7%	30.7%	0.6%
McPherson Square	356	58,186,364	5.0%	2	195,901	1.8%	61.4%	16.3%
Medical Center	9	135,148	0.0%	0	0	0.0%	46.6%	1.1%
Metro Center	291	45,510,371	3.9%	2	45,932	0.4%	74.9%	14.6%
Minnesota Avenue	58	623,403	0.1%	0	0	0.0%	22.1%	2.5%
Morgan Boulevard	0	0	0.0%	0	0	0.0%	--	--
Mt Vernon Sq-7th St-Convention Ctr	380	15,228,781	1.3%	2	103,954	1.0%	73.1%	11.5%
Navy Yard-Ballpark	57	6,499,555	0.6%	1	118,000	1.1%	85.3%	7.6%
Naylor Road	21	249,247	0.0%	0	0	0.0%	0.0%	0.0%
New Carrollton	14	1,227,072	0.1%	0	0	0.0%	99.9%	7.8%
NOMA-Gallaudet	79	4,326,773	0.4%	1	545,823	5.1%	78.6%	2.9%
Pentagon	3	678,854	0.1%	0	0	0.0%	100.0%	0.0%
Pentagon City	20	4,110,843	0.4%	0	0	0.0%	98.6%	2.2%
Potomac Avenue	144	997,140	0.1%	1	12,500	0.1%	53.9%	3.4%
Prince George's Plaza	24	2,394,754	0.2%	0	0	0.0%	39.9%	16.5%
Rhode Island Ave-Brentwood	46	907,147	0.1%	0	0	0.0%	39.0%	11.0%
Rockville	113	3,495,535	0.3%	0	0	0.0%	65.7%	8.7%
Ronald Reagan Wash. National Airpt	2	2,514,706	0.2%	0	0	0.0%	0.0%	--
Rosslyn	54	11,536,164	1.0%	0	0	0.0%	60.9%	18.4%
Shady Grove	22	267,250	0.0%	0	0	0.0%	24.2%	5.8%
Shaw-Howard Univ	488	4,065,590	0.3%	0	0	0.0%	13.5%	7.2%
Silver Spring	152	8,477,058	0.7%	0	0	0.0%	67.0%	16.6%
Smithsonian	15	4,992,087	0.4%	0	0	0.0%	73.6%	20.3%
Southern Avenue	0	0	0.0%	0	0	0.0%	--	--
Spring Hill	84	5,607,961	0.5%	0	0	0.0%	0.5%	17.2%

Metrorail Station Half-Mile Walkshed	Built Prior to 2020			2020 Completions			Percent Built Since Station Opened	2020 Year End Vacancy Rate
	Buildings	Units	Share	Buildings	Units	Share		
Stadium-Armory	31	930,608	0.1%	0	0	0.0%	52.1%	0.0%
Suitland	9	44,940	0.0%	0	0	0.0%	0.0%	0.0%
Takoma	60	764,085	0.1%	0	0	0.0%	3.9%	0.4%
Tenleytown-AU	131	2,373,679	0.2%	1	236,000	2.2%	37.3%	4.7%
Twinbrook	85	2,835,518	0.2%	0	0	0.0%	53.3%	14.1%
Tysons Corner	31	6,699,352	0.6%	0	0	0.0%	19.3%	6.8%
U St/Afr-Amer Civil War Mem/Cardozo	429	5,501,710	0.5%	0	0	0.0%	13.2%	9.6%
Union Station	174	14,638,964	1.3%	1	545,823	5.1%	68.1%	7.6%
Van Dorn Street	23	839,613	0.1%	0	0	0.0%	0.0%	2.8%
Van Ness-UDC	26	1,718,636	0.1%	0	0	0.0%	57.6%	9.7%
Vienna-Fairfax-GMU	0	0	0.0%	0	0	0.0%	--	--
Virginia Square-GMU	105	4,220,453	0.4%	1	240,000	2.2%	79.9%	16.3%
Waterfront	22	1,703,534	0.1%	0	0	0.0%	85.9%	3.5%
West Falls Church-VT/UVA	2	105,656	0.0%	0	0	0.0%	0.0%	--
West Hyattsville	39	379,724	0.0%	0	0	0.0%	8.6%	1.6%
Wheaton	175	1,699,372	0.1%	1	308,000	2.9%	28.7%	5.3%
White Flint	61	3,588,507	0.3%	1	212,000	2.0%	62.0%	12.6%
Wiehle-Reston East	42	2,927,408	0.3%	1	212,957	2.0%	19.2%	15.9%
Woodley Park-Zoo/Adams Morgan	46	3,022,737	0.3%	0	0	0.0%	2.6%	4.6%
DC Station Walkshed Totals	*4,065*	*201,826,533*	*17.3%*	*14*	*2,155,338*	*20.0%*	*57.9%*	*13.8%*
Maryland Station Walkshed Totals	*1,295*	*42,416,446*	*3.6%*	*4*	*1,161,000*	*10.8%*	*56.5%*	*13.3%*
Virginia Station Walkshed Totals	*1,031*	*83,915,354*	*7.2%*	*6*	*672,332*	*6.2%*	*57.3%*	*14.4%*
Inside Walkshed Total	*6,391*	*328,158,333*	*28.2%*	*24*	*3,988,670*	*37.0%*	*57.5%*	*13.8%*
Outside Walkshed Total	*32,153*	*835,760,185*	*71.8%*	*100*	*6,792,866*	*63.0%*	*69.8%*	*9.9%*
Regional Total	**38,544**	**1,163,918,518**	**100.0%**	**124**	**10,781,536**	**100.0%**	**68.2%**	**10.2%**

Source: CoStar, COG

Half-Mile Walkshed Geography Methodology

The geography used to calculate walkshed totals for Metrorail stations was created by Transportation Planning Board (TPB) staff in 2019. Station areas with more intersections, smaller blocks and fewer barriers will have a walkshed with a larger total area. The largest theoretical area is .79 square miles—the area of a circle with a radius of 0.5 miles. Stations areas with higher construction totals could be the result of having more construction activity or having a more extensive half-mile walkshed (or both). The analysis was only performed on walksheds as they exist in 2019. The same 2019 vintage walkshed geography was used for looking at past construction. Therefore, the station area totals for previous years are for an area that may not been accessible via a half-mile walk until a later time—or even had a station built yet. More information on walksheds can be found on the TPB News blog: Walksheds show planners how easily people can walk to transit.

APPENDIX E

Commercial Construction Definitions (adapted from CoStar Glossary[4])

COMMERCIAL CONSTRUCTION PROJECT
A property with one or more completed buildings that allocates the majority of usable space to one the following categories: office, retail, industrial, flex, hospitality, healthcare, specialty, or sports and entertainment. Some government owned buildings are excluded from the CoStar dataset. Mixed-use buildings with a residential primary use are also excluded.

COMPLETION
Projects with buildings that are completed and are ready for occupancy. A certificate of occupancy has been received.

SQUARE FEET OF RENTABLE BUILDING AREA
The usable area of a project and its associated share of the common areas. Typically, rents are based on this area. It is the space the tenant will occupy in addition to the associated common areas of the building such as the lobby, hallways, bathrooms, equipment rooms, etc.

VACANCY RATE
Expressed as a percentage, the vacancy rate identifies the amount of unoccupied space in an area divided by the total rentable building area. In this report, the general commercial construction rate applies to all buildings in the flex, industrial, office, or retail categories, but excludes hospitality, healthcare, specialty, and sports and entertainment projects.

STRUCTURE TYPE (DEFINITIONS FROM THE COSTAR GLOSSARY)
All buildings in the CoStar database are assigned a structure type. Mixed-use buildings are assigned based upon a project's primary use. Retail space located in an office building is categorized as office space, while retail or office space located within an apartment building is excluded from this report.

FLEX
Designed to be versatile, which may be used in combination with office (corporate headquarters), research and development, quasi-retail sales, and including but not limited to industrial, warehouse, and distribution uses. At least half of the rentable area of the building must be used as office space. Flex buildings typically have ceiling heights under 18', with light industrial zoning. Flex buildings have also been called incubators, tech, and showrooms.

HEALTH CARE
Includes assisted living, congregate senior housing, continued care retirement communities, hospitals, rehabilitation centers, and skilled nursing facilities.

HOSPITALITY
Includes all types of lodging facilities including hotels and motels. Hotels are facilities that offer lodging accommodations and a wide range of other services, e.g., restaurants, casinos, convention facilities, meeting rooms, recreational facilities, and commercial shops.

[4] http://www.costar.com/about/costar-glossary

INDUSTRIAL
Adapted for a combination of uses such as assemblage, processing, and/or manufacturing products from raw materials or fabricated parts. Additional uses include warehousing, distribution, self-storage, and maintenance facilities.

OFFICE
Primary intended use is to house employees of companies that produce a product or service primarily for support services such as administration, accounting, marketing, information processing and dissemination, consulting, human resources management, financial and insurance services, educational and medical services, and other professional services. Government-owned and operated office buildings are generally excluded.

OTHER
Includes specialty projects (such as cemeteries, mausoleums, some correctional facilities, lodges and meeting halls, marinas, movie, radio and television studios, some police and fire stations, some post offices, some public libraries, radio and TV transmission facilities, recycling centers, religious facilities, private schools, shelters, sorority and fraternity houses, trailer/camper parks, water retention facilities, and vineyards) and sports and entertainment projects (such as amusement parks, stadiums, casinos, golf courses, stables, race tracks, swimming pools, theaters, and concert halls). Earlier versions of this report included parking decks in the count of specialty projects. This report does not include parking decks, resulting in slightly lower commercial construction totals than in previous reports.

RETAIL
Primary intended use is to promote, distribute, or sell products and services to the public. Retail buildings can be used for various sales opportunities, including, but not limited to, stand-alone (convenience stores to department stores), store fronts, strip centers (no anchors), neighborhood, community, regional, and super-regional malls, power centers, factory outlet centers, and fashion or specialty centers.

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