

COMMERCIAL CONSTRUCTION INDICATORS

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

2019 Edition



Metropolitan Washington
Council of Governments

COMMERCIAL CONSTRUCTION INDICATORS 2019

May 14, 2020

ABOUT COG

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 2019 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 eight percent from 2018 to 2019. In 2019, 160 new commercial buildings were completed, adding 12.7 million square feet of rentable space to the region.
- Over the past decade, annual rates of construction have been below regional historical averages. The 2010s averaged 10.9 million square feet of new commercial space per year; the previous decade saw an average of 22.2 million square feet per year in the region.
- The overall regional vacancy rate was 9.5 percent at the end of 2019, one of the highest in the country.
- The office sector held the greatest share of commercial construction in 2019, creating 35 percent of the region's new space.
- Just over 41 percent of commercial space built in 2019 was within a half-mile walk from a Metrorail station, while only 28 percent of space built before 2019 is in a Metrorail station walkshed.
- With five new buildings and 2.3 million square feet of new space in 2019, the Downtown DC Activity Center was the fastest growing neighborhood in the region, accounting for 18 percent of all regional commercial growth.
- Overall, 65 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](#).

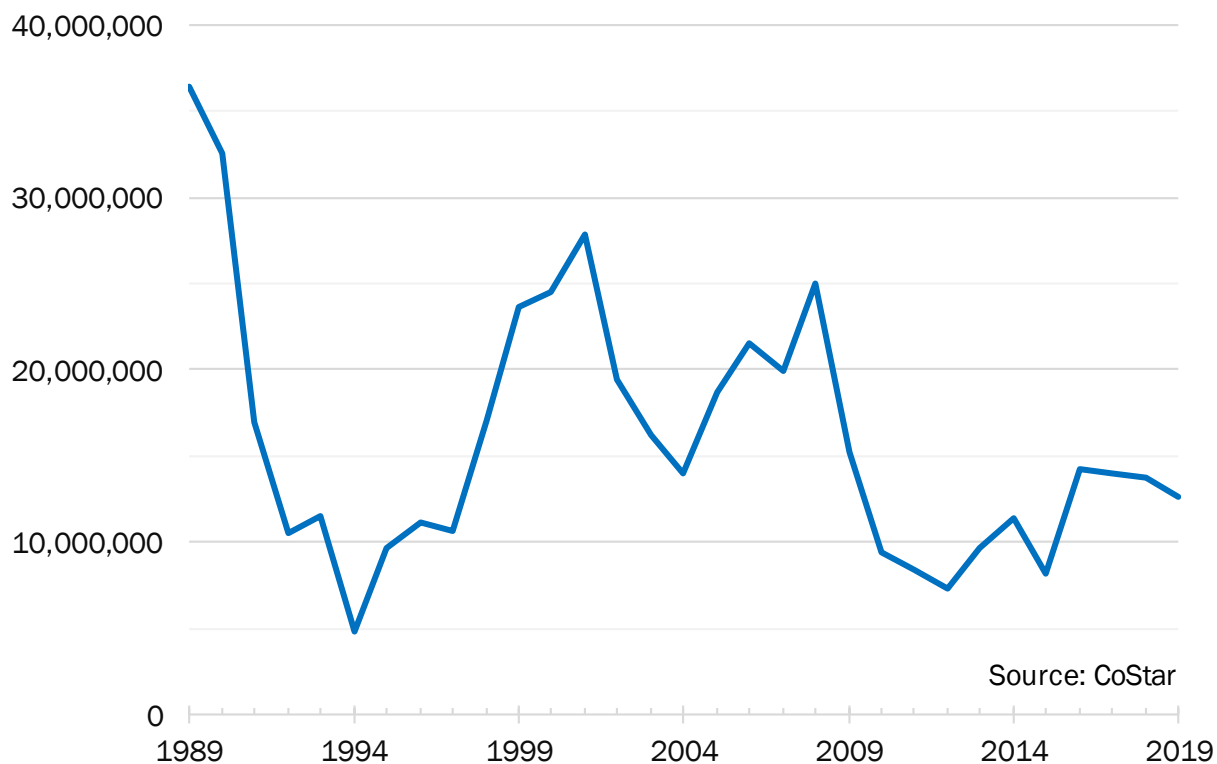
In this report, the metropolitan Washington region refers to the areas surrounding the District of Columbia that are members of COG, as shown below in Figure 1 below.

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



Commercial construction in the metropolitan Washington region decreased by eight percent in 2019. Last year, 160 new commercial buildings were completed, with 12.7 million square feet of combined space, a decline of about one million square feet from 2018.

Figure 2. Square Footage of Completed Commercial Construction, 1989 - 2019



The rate of construction has fallen by almost half compared to 2008, which was the peak year of commercial real estate growth before the Great Recession (Figure 2). Over the past decade, the region has added an average of about 11 million square feet of new space per year, the lowest pace of construction since the 1950s.

During the 2010s, the commercial construction industry has faced several challenges. Reduced Federal procurement has hampered economic growth in the COG region. Shared workstations, open office plans, teleworking and smaller equipment have meant that businesses demand less office space than in the past. The brick-and-mortar retail industry has faced stiff competition from e-commerce. A strong multi-family residential market pushed

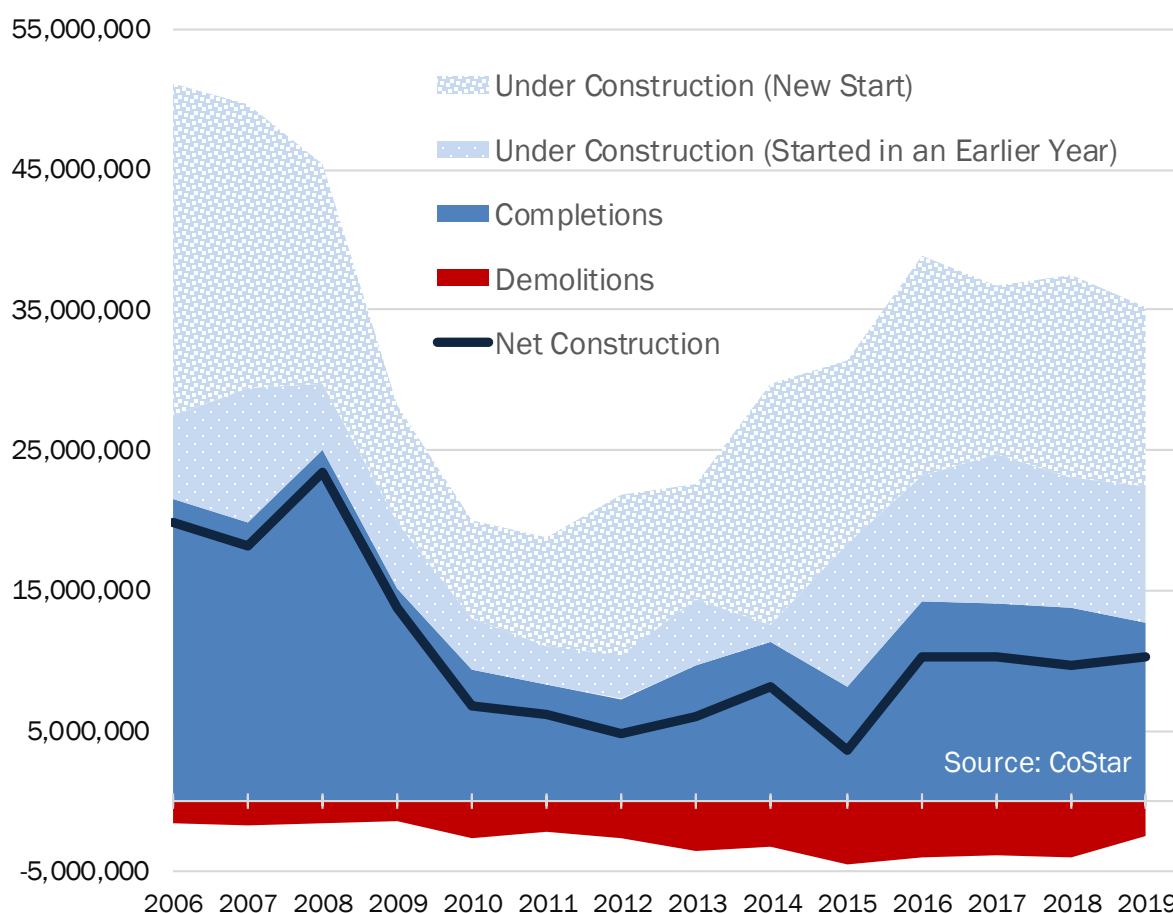
The global spread of COVID-19 in 2020 has severely impacted the economy. This report presents and analyzes CoStar real estate data through the end of 2019, before the threat of the virus impacted life in the COG region. Construction has remained an essential business through the first months of the virus response in the District of Columbia, Maryland and Virginia.

developers to focus more on new apartment buildings and less on commercial buildings, while high housing costs impact the region's labor market competitiveness.

Demand for new hospitality, healthcare and industrial space has remained relatively strong. The growing reliance on e-commerce has spurred increased construction in the warehousing, distribution and data center subsectors.

In 2019, 2.4 million square feet of commercial space were demolished, representing 19 percent of the new space added last year (Figure 3). With over 22 million square feet of new commercial space under construction at the end of 2019, there is potential for increased growth in commercial construction in the years ahead.

Figure 3. Net Commercial Construction, 2006 - 2019



The overall regional vacancy rate for commercial space rose for the first time in five years and was at 9.7 percent at the end of 2019. Vacancy rates remain high compared to both current national trends and historical regional trends, particularly in the office sector.

The largest commercial project completed in 2019 was the 12-story, 758,000 square foot office building at 655 New York Ave, near the Mt Vernon Sq/7th St-Convention Center Metrorail station in the District of Columbia. Built by the Douglas Development Corporation, 655 New York Ave incorporated existing historic buildings into the new structure.

The neighborhood around the Walter E. Washington Convention Center was particularly active in 2019, with four buildings and 2.3 million square feet of rentable building area added. Altogether, the region's ten largest projects in 2019, shown in Figure 4 below, combined to make up 39 percent of the region's 12.7 million square feet of new commercial space.

Figure 4. Ten Largest Projects by Rentable Building Area in 2019

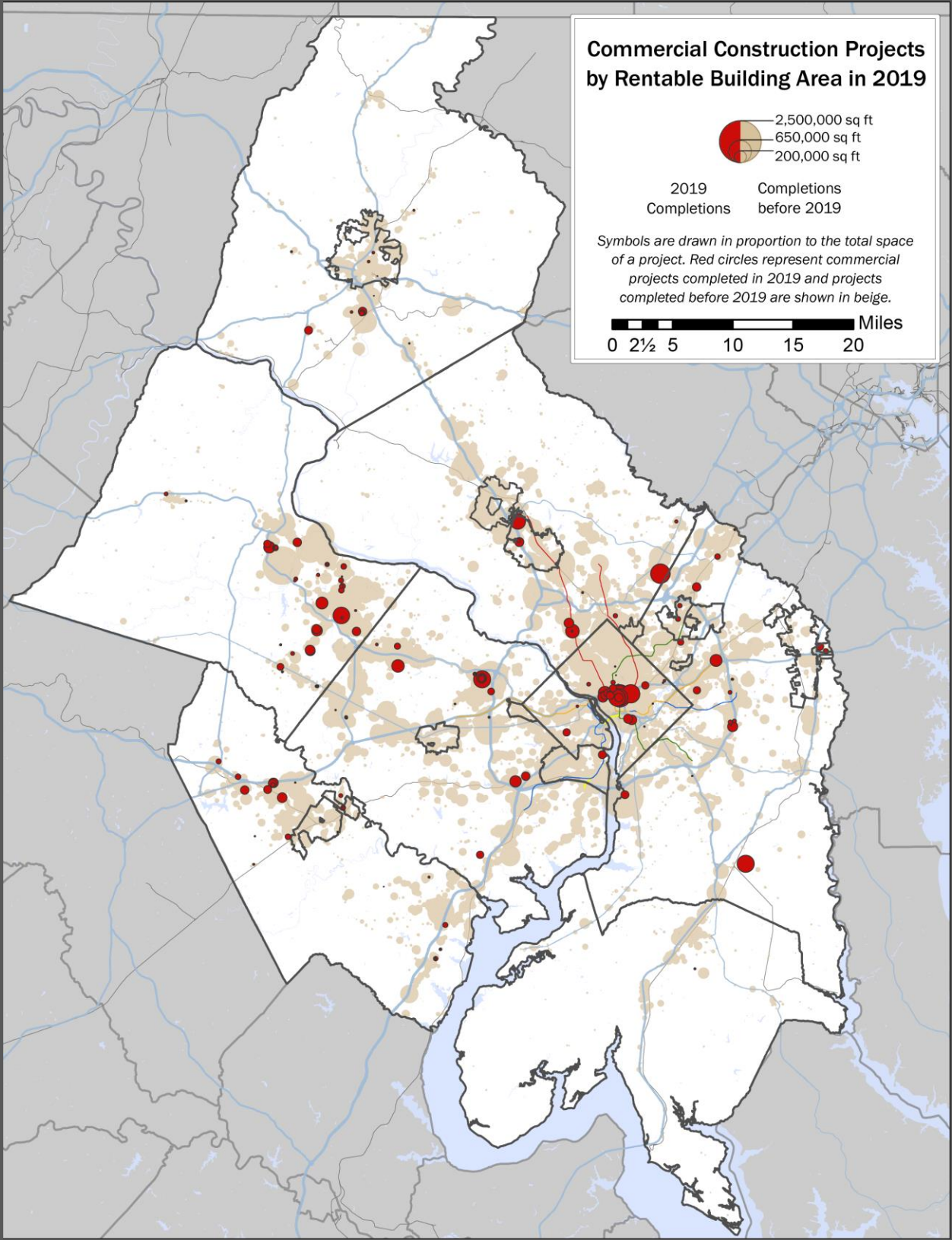
Project Name	Land Use	Street Address	Jurisdiction	Stories	RBA*
655 New York Ave	Office	655 New York Ave NW Washington, DC	District of Columbia	12	758,000
Columbia Place Marriott	Hotel	911 L St NW Washington, DC	District of Columbia	12	568,921
Washington Adventist Hospital at White Oak Medical Center, Phase 1	Hospital	12040 Plum Orchard Dr Silver Spring, MD	Montgomery County	7	562,730
Four Constitution Square	Office	150 M St NE Washington, DC	District of Columbia	11	522,550
Keys Energy Center	Natural Gas Power Plant	N Keys Rd Brandywine, MD	Prince George's County	--	450,000
700K at Anthem Row	Office	700 K St NW Washington, DC	District of Columbia	12	442,676
Boro Tower	Office	8350 Broad St McLean, VA	Fairfax County	20	438,169
QTS	Industrial (Data Center)	2271 Broderick Dr Sterling, VA	Loudoun County	3	427,320
Conrad Washington DC	Hotel	950 New York Ave NW Washington, DC	District of Columbia	10	413,000
Gardenside - Ingleside At King Farm, Phase II	Continuing Care Retirement Community	701 King Farm Blvd Rockville, MD	City of Rockville	--	374,614

*RBA = rentable building area

Source: CoStar

Figure 5 on the following page maps the location of projects completed in 2019. 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.

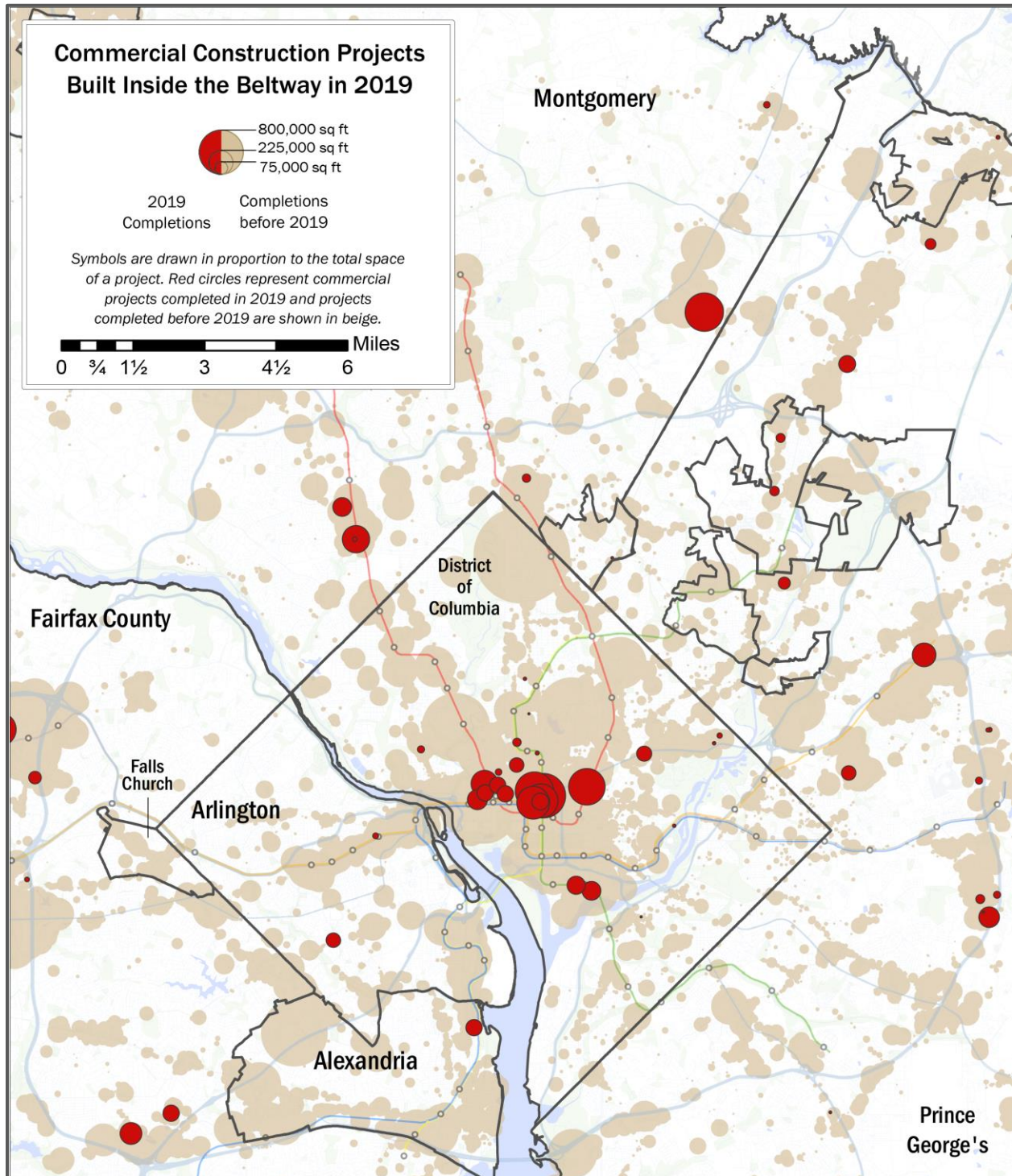
Figure 5



Source: CoStar

Figure 6 below shows construction within the Beltway. About 45 percent of regional construction in 2019 was located inside of I-495; historically, 46 percent of construction has been within the Beltway. About 79 percent of the 5.7 million square feet of space that was constructed inside the Beltway in 2019 was also within a half-mile walk of a Metrorail station, compared with only 57 percent of existing commercial construction.

Figure 6



Source: CoStar

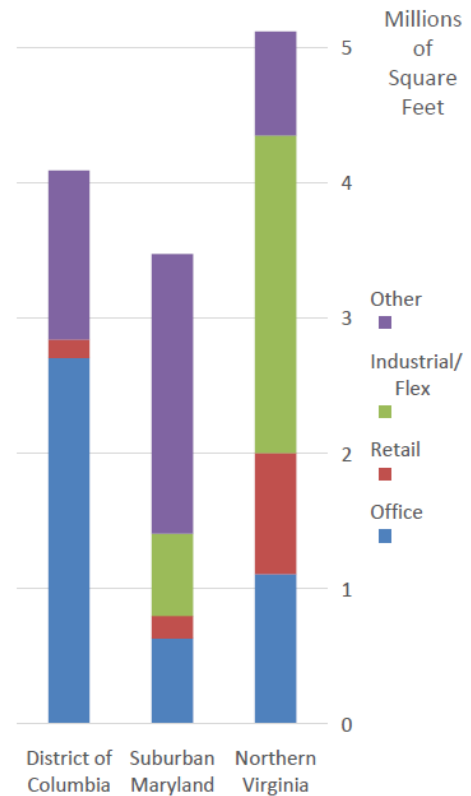
Commercial Construction by State

The District of Columbia added 25 new commercial buildings and 4.1 million square feet of space in 2019, primarily in office buildings (Figure 7). Construction in the District declined by three percent from 2018 (Figure 8). With more than four million square feet of construction in each of the past two years, construction in the District has nearly returned to its pre-Recession levels. The vacancy rate in the District of Columbia was about 9.2 percent at the end of 2019.

In 2019, 45 new buildings and 3.5 million square feet of rentable space were added to suburban Maryland jurisdictions (Figure 7). In suburban Maryland, commercial construction increased by 79 percent from 2018 (Figure 8). At the end of 2019, the Maryland jurisdiction vacancy rate was 8.4 percent.

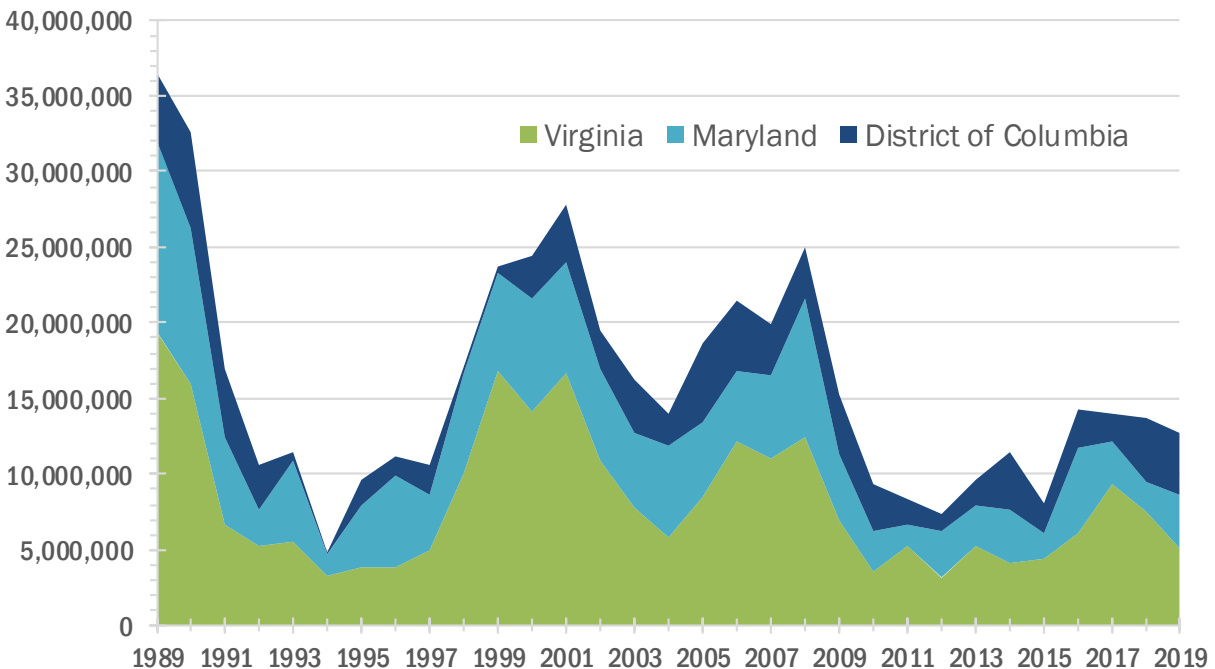
Northern Virginia jurisdictions added 90 new buildings and 5.1 million square feet of space in 2019, a decrease of 32 percent from 2018. Virginia jurisdictions have accounted for more than half of all regional construction since 2015. The Northern Virginia vacancy rate was about 9.8 percent at the end of 2019.

Figure 7. 2019 Projects by Rentable Building Area



Source: CoStar

Figure 8. Square Footage of Completed Commercial Construction by State, 1989 - 2019



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 28 new buildings and 4.3 million square feet of new space in 2019 (Figure 9). Construction in Central Jurisdictions declined by 19 percent from 2018 (Figure 10). At the end of 2019, the vacancy rate for Central Jurisdictions was 11.3 percent.

In 2019, 56 new buildings and 4.7 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 increased by 22 percent from 2018 (Figure 10). The overall regional vacancy rate for Inner Jurisdictions was 9.4 percent at the end of 2019.

The Outer Jurisdictions of Charles, Frederick, Loudoun, and Prince William Counties, Manassas, and Manassas Park added 76 buildings and 3.7 million square feet of space in 2019 (Figure 9). New construction declined by 19 percent from 2018 (Figure 10). At the end of 2019, the vacancy rate for Outer Jurisdictions was 6.8 percent.

Figure 9. 2019 Projects by Rentable Building Area

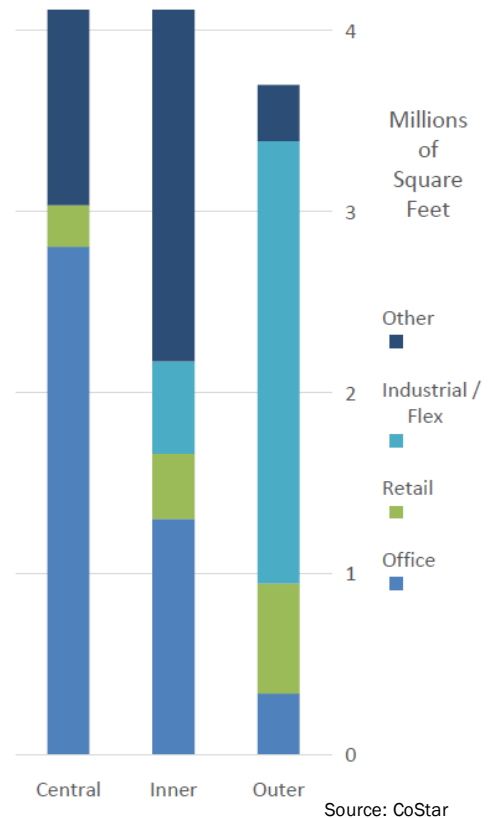
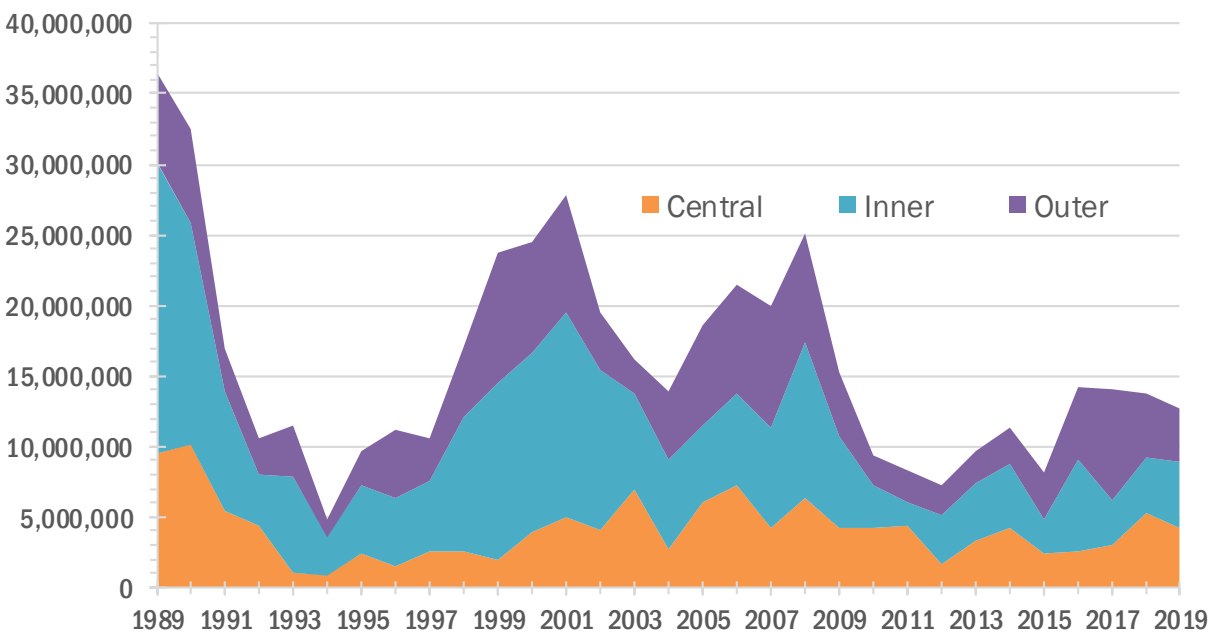


Figure 10. Square Footage of Completed Commercial Construction by Jurisdictional Groups, 1989 - 2019



Note: This stacked area chart shows cumulative values.

Source: CoStar

Commercial Construction by Jurisdiction

For the second consecutive year, the District of Columbia paced the region in commercial construction, accounting for 32 percent of the region's new rentable building area in 2019. Historically, the District has been the regional leader in commercial construction, except for a period from the early 1980s through mid-2000s, when Fairfax County regularly had the most construction. Over the past decade, Loudoun County has seen significant additions of new space, primarily from warehouses, data centers and a power plant.

Figure 11. Commercial Construction Totals for Each COG Member Jurisdiction

Jurisdiction	Built Prior to 2019			2019 Completions			Estimated 2019 Year End Vacancy Rate
	Buildings	RBA	Share	Buildings	RBA	Share	
District of Columbia	8,014	254,552,617	22.2%	25	4,091,817	32.3%	10.5%
Suburban Maryland Jurisdictions							
Charles	1,210	18,394,026	1.6%	1	7,612	0.1%	8.8%
Frederick	2,692	49,598,661	4.3%	12	349,872	2.8%	9.3%
<i>City of Frederick</i>	<i>1,376</i>	<i>23,162,773</i>	<i>2.0%</i>	<i>3</i>	<i>21,322</i>	<i>0.2%</i>	<i>9.2%</i>
<i>Rest of County</i>	<i>1,316</i>	<i>26,435,888</i>	<i>2.3%</i>	<i>9</i>	<i>328,550</i>	<i>2.6%</i>	<i>9.3%</i>
Montgomery	5,446	170,126,298	14.8%	11	1,576,632	12.4%	8.9%
<i>Gaithersburg</i>	<i>583</i>	<i>19,537,096</i>	<i>1.7%</i>	<i>0</i>	<i>0</i>	<i>0.0%</i>	<i>4.5%</i>
<i>Rockville</i>	<i>631</i>	<i>23,586,976</i>	<i>2.1%</i>	<i>3</i>	<i>523,078</i>	<i>4.1%</i>	<i>12.8%</i>
<i>Takoma Park</i>	<i>134</i>	<i>1,642,782</i>	<i>0.1%</i>	<i>1</i>	<i>2,790</i>	<i>0.0%</i>	<i>2.9%</i>
<i>Rest of County</i>	<i>4,098</i>	<i>125,359,444</i>	<i>10.9%</i>	<i>7</i>	<i>1,050,764</i>	<i>8.3%</i>	<i>8.9%</i>
Prince George's	6,614	152,605,406	13.3%	21	1,540,257	12.1%	7.4%
<i>Bladensburg</i>	<i>111</i>	<i>1,244,062</i>	<i>0.1%</i>	<i>0</i>	<i>0</i>	<i>0.0%</i>	<i>6.5%</i>
<i>Bowie</i>	<i>247</i>	<i>6,400,773</i>	<i>0.6%</i>	<i>3</i>	<i>156,224</i>	<i>1.2%</i>	<i>10.2%</i>
<i>College Park</i>	<i>263</i>	<i>5,075,670</i>	<i>0.4%</i>	<i>2</i>	<i>66,185</i>	<i>0.5%</i>	<i>6.8%</i>
<i>Greenbelt</i>	<i>103</i>	<i>5,097,963</i>	<i>0.4%</i>	<i>0</i>	<i>0</i>	<i>0.0%</i>	<i>13.4%</i>
<i>Hyattsville</i>	<i>238</i>	<i>4,341,180</i>	<i>0.4%</i>	<i>0</i>	<i>0</i>	<i>0.0%</i>	<i>4.0%</i>
<i>Laurel</i>	<i>398</i>	<i>5,859,360</i>	<i>0.5%</i>	<i>1</i>	<i>6,000</i>	<i>0.0%</i>	<i>6.8%</i>
<i>Rest of County</i>	<i>5,254</i>	<i>124,586,398</i>	<i>10.8%</i>	<i>15</i>	<i>1,311,848</i>	<i>10.3%</i>	<i>7.3%</i>
Maryland subtotal	15,962	390,724,391	34.0%	45	3,474,373	27.4%	8.4%
Northern Virginia Jurisdictions							
Alexandria	1,758	42,130,040	3.7%	1	100,000	0.8%	13.1%
Arlington	1,026	60,993,234	5.3%	2	94,400	0.7%	13.4%
Fairfax	5,295	231,505,486	20.2%	24	1,580,344	12.5%	11.2%
Fairfax City	508	9,311,810	0.8%	0	0	0.0%	8.6%
Falls Church	277	4,210,318	0.4%	0	0	0.0%	5.0%
Loudoun	2,377	86,456,170	7.5%	40	2,385,734	18.8%	6.0%
Manassas City	635	10,213,703	0.9%	1	4,800	0.0%	4.1%
Manassas Park	123	2,178,969	0.2%	2	55,000	0.4%	4.2%
Prince William	2,313	56,004,981	4.9%	20	897,930	7.1%	5.7%
Virginia subtotal	14,312	503,004,711	43.8%	90	5,118,208	40.4%	9.8%
COG Region Total	38,288	1,148,281,719	100.0%	160	12,684,398	100.0%	9.5%

Source: CoStar

Metrorail Station Walksheds

In 2019, 19 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 a total of 5,255,981 square feet in 31 buildings. Construction in station areas increased 18 percent from 2018.

The share of total regional construction within a Metro station walkshed grew from 32 percent in 2018 to 41 percent in 2019. Just over 85 percent of new office space in 2019 was sited within a Metrorail walkshed, the highest share of the region's annual office construction in the system's history.

The Mt Vernon Sq/7th St-Convention Center station walkshed had the most construction in 2019 with 2.3 million square feet of space from five buildings. The average vacancy rate for buildings within a Metrorail walkshed was 11.4 percent at the end of 2019.



Located two and a half blocks from the Mt Vernon Sq/7th St-Convention Center Metrorail station, 655 NY Ave was the largest project built in 2019 and is the largest office building built in DC in the last 12 years (Douglas Development)

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 region¹.

From 2018 to 2019, construction within Activity Centers declined by 19 percent. The Downtown DC Activity Center had the most construction in 2019, with 2.3 million square feet of space from five 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 2019, 65 percent of new construction was within an Activity Center. In the nine years since the *Region Forward Vision* was approved by the COG Board in 2010, 66 percent of commercial construction has been inside Activity Centers.

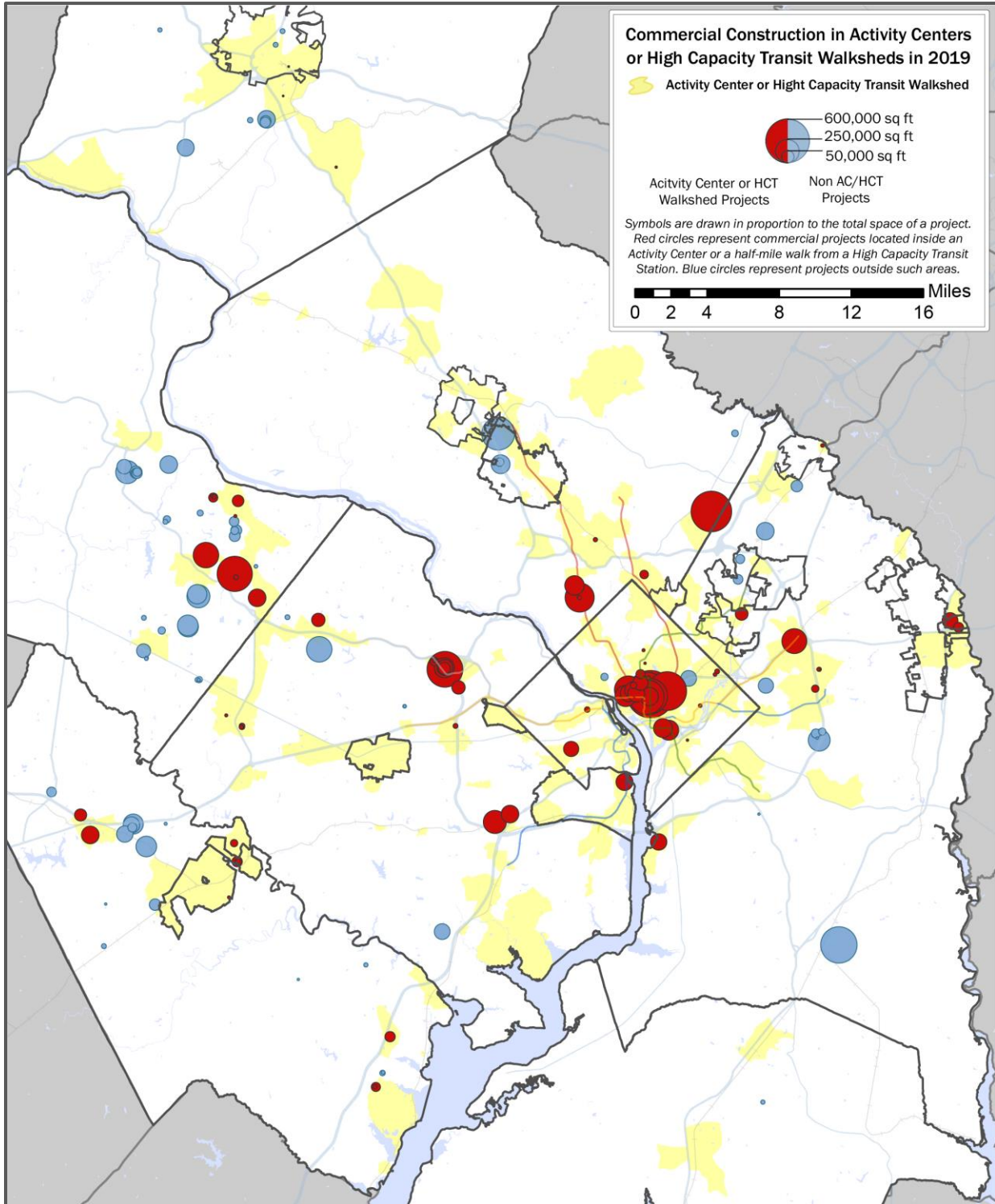
In 2019, Transportation Planning Board staff identified 199 [high-capacity transit \(HCT\) stations](#) in the region—including Metrorail, MARC, and VRE commuter rail, bus rapid transit, and streetcar stations.² Last year, 58 percent of new commercial construction was located within a half-mile walk from a high-capacity transit station. All but two of the of the buildings in high-capacity transit walksheds were also in Activity Centers, the exceptions being small retail properties in the Georgia

¹ See Appendix B for a map of Activity Centers and Appendix C for Activity Center construction totals.

² See Appendix D for Metrorail station area construction totals and an explanation of how the walkshed geography was calculated.

Ave-Petworth Metrorail station and the Laurel MARC station walksheds. The 82 new projects completed within either an Activity Center or high-capacity transit station walkshed are shown in Figure 12 below.

Figure 12



Source: CoStar, COG

Construction by Structure Type

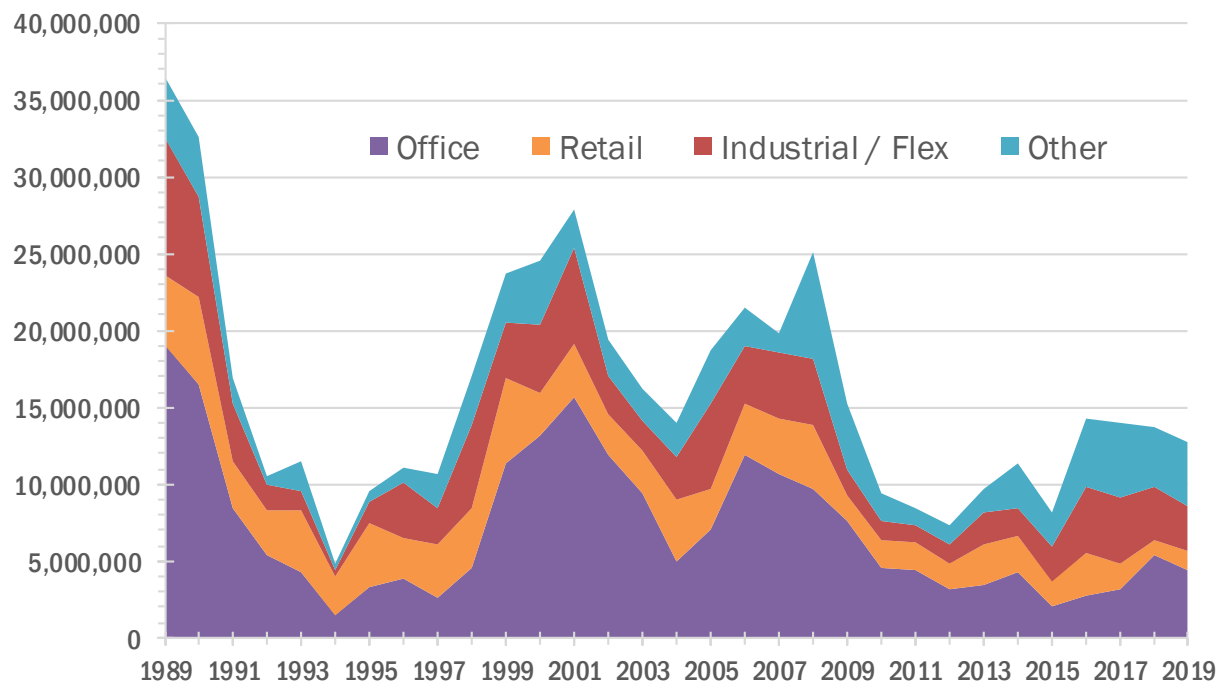
Office sector is the largest commercial real estate submarket and the main driver of employment in the COG region. Over the past decade, office buildings remained the largest source for new commercial space, but the office share of total construction fallen more than any other sector. The drop in the 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. The healthcare and specialty sectors were the only property types to see more construction during the 2010s than the 2000s.

Figure 13. Table of Construction by Construction Type

Structure Type	Prior to 2019			2019		
	Buildings	Square Feet	Share	Buildings	Square Feet	Share
Office	10,402	481,227,009	41.9%	30	4,445,073	35.0%
Retail	17,439	233,928,548	20.4%	66	1,198,290	9.4%
Industrial / Flex	6,486	230,647,849	20.1%	36	2,957,212	23.3%
Healthcare	375	38,655,030	3.4%	7	1,377,665	10.9%
Hospitality	657	76,376,281	6.7%	8	1,528,585	12.1%
Other	2,929	87,447,002	7.6%	13	1,177,573	9.3%
Total	38,288	1,148,281,719	100%	160	12,684,398	100%

Source: CoStar

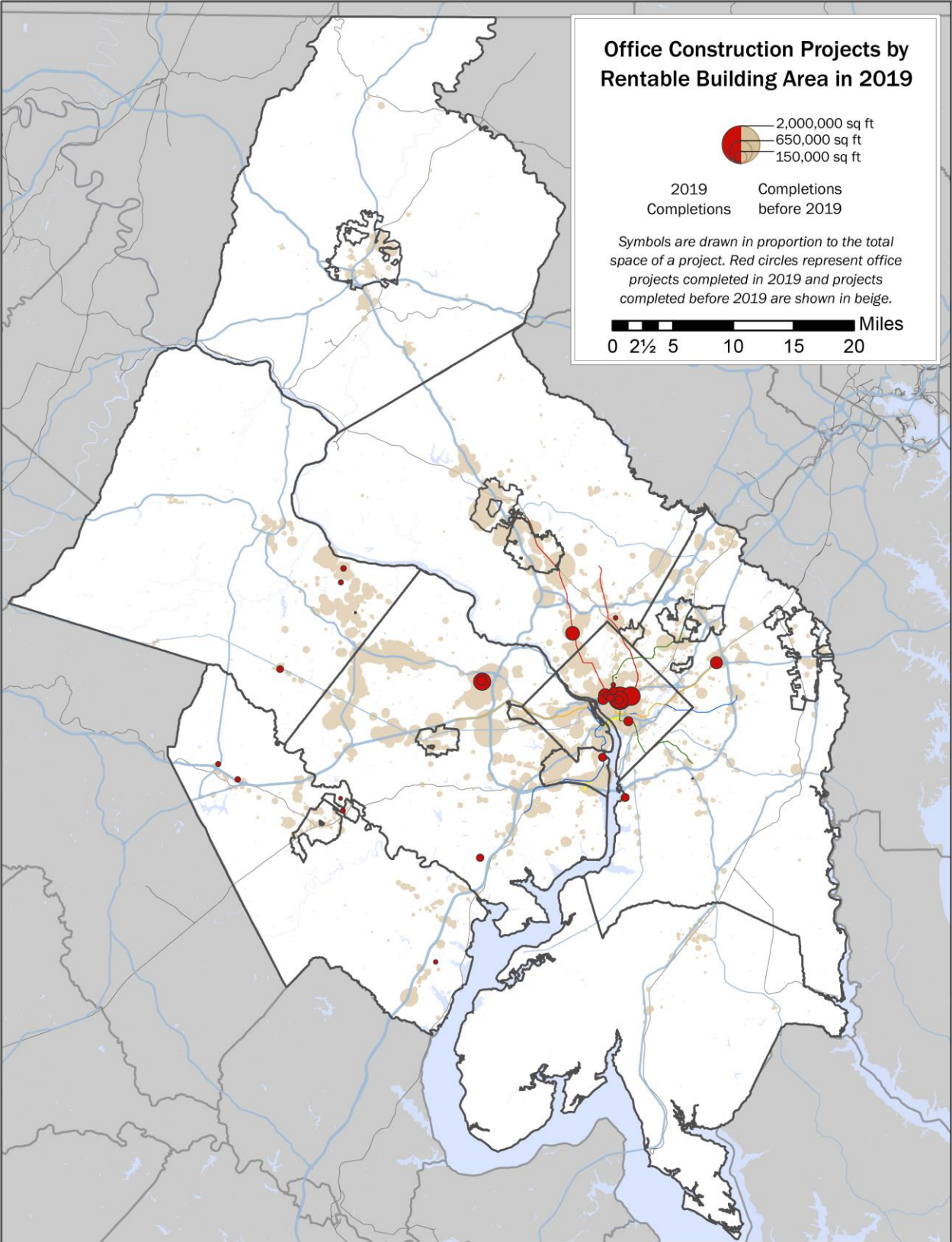
Figure 14. Square Footage of Completed Commercial Construction by Structure Type, 1989 - 2019



Note: This stacked area chart shows cumulative values.

Source: CoStar

Figure 15



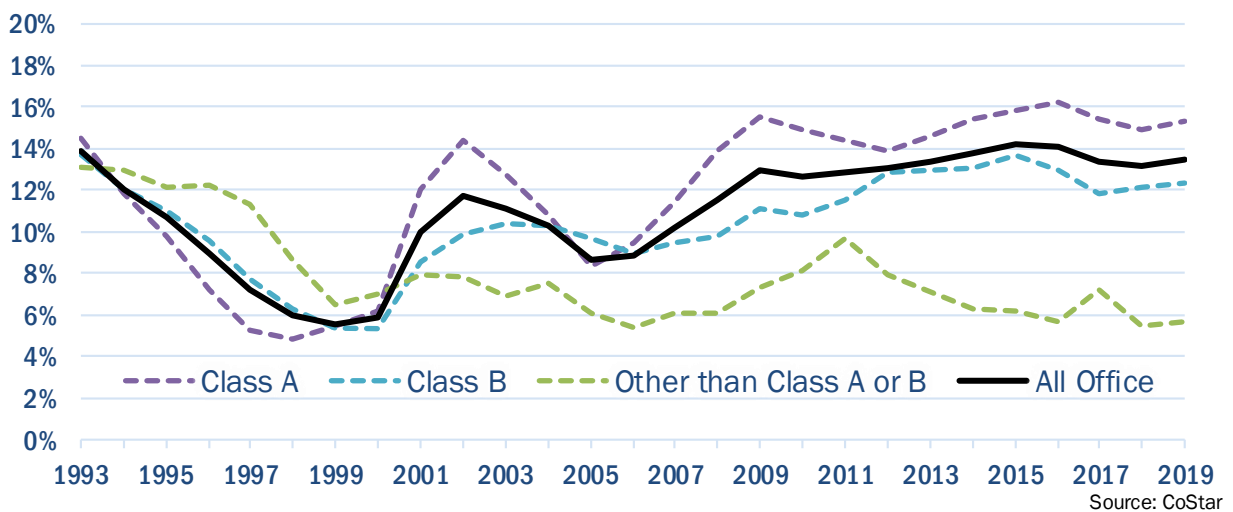
Source: CoStar

Office Construction

Construction of new office space declined 17 percent from 2018 to 2019, the first drop in office construction in three years. Thirty new office projects were completed in 2019, with a combined total of 4.4 million new square feet of space. The 12-story, 758,000 square foot office building at 655 New York Ave in the District of Columbia was the largest completed office project.

Figure 15 on the previous page maps 2019 office projects. The District of Columbia accounted for 61 percent of new office space. All new office buildings in the District were within a half-mile walk of a Metro station. Outside the District, 63 percent of new office space was in a Metrorail walkshed.

Figure 16. Office Vacancy Rate in the COG Region, 1993 - 2019



The regional average vacancy rate for office space in 2019 was about 13 percent. Office vacancy rose throughout the first decade and half of this century, peaking in 2015 (Figure 16). Premium and newer office space have the highest vacancy. Nearly a third of office space built in 2019 remained empty at year's end. Vacancy data by age of building suggests that it takes about three years for new buildings to find office tenants (Figure 17).

Figure 17. Average Office Vacancy Rate by Age of Office Building in 2019

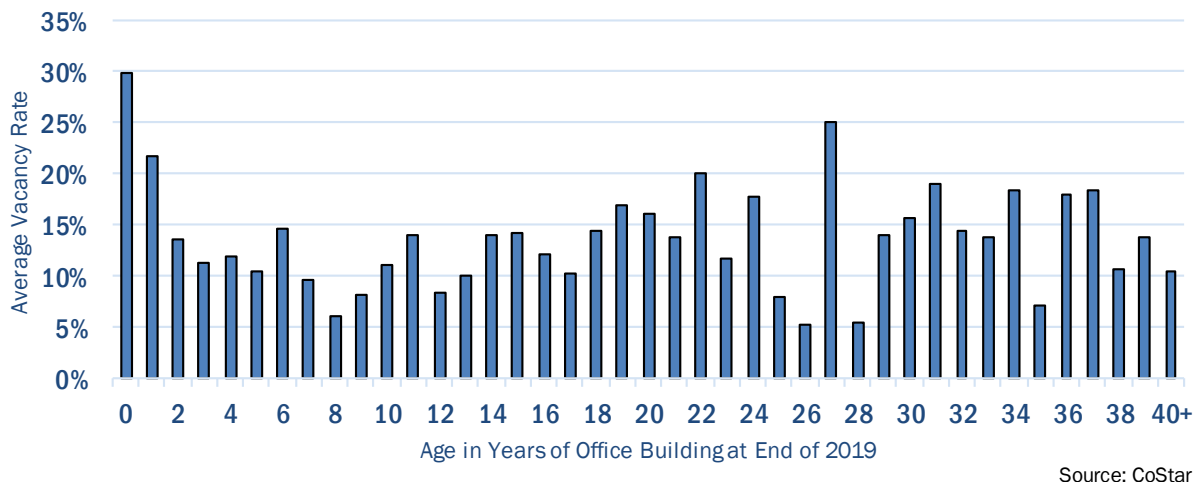
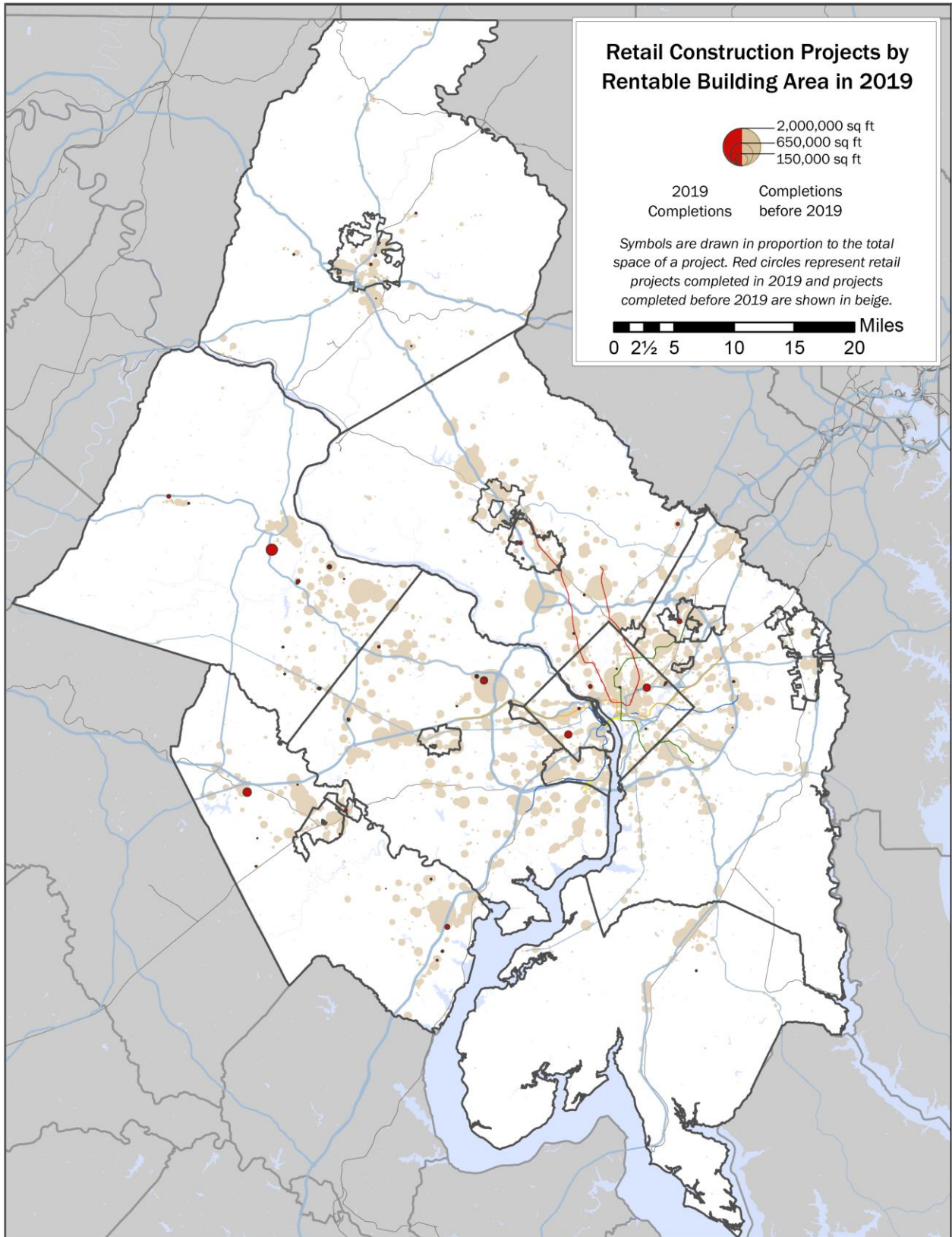


Figure 18



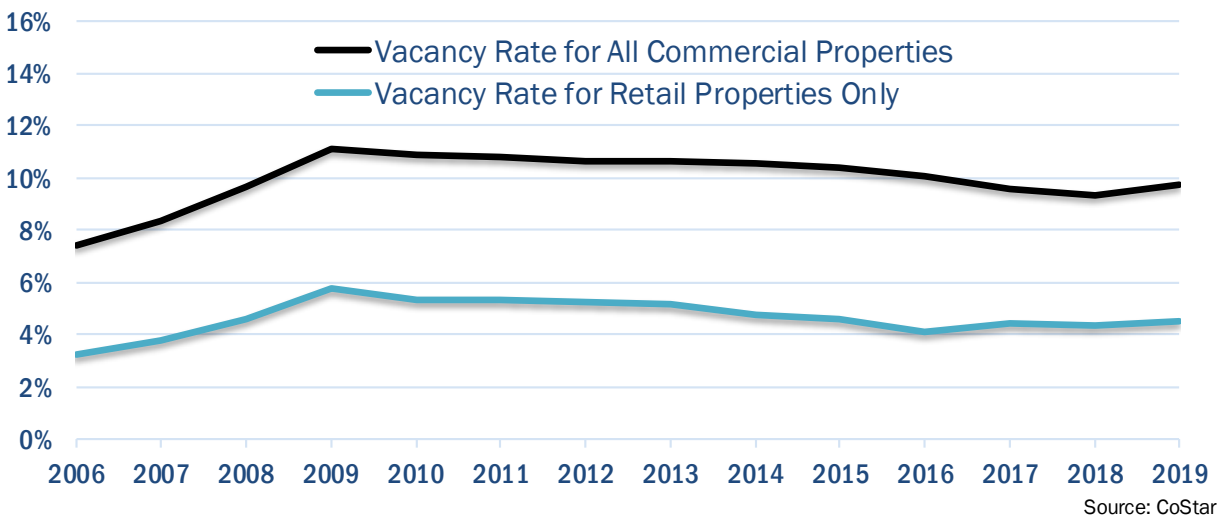
Source: CoStar

Retail Construction

Stand-alone retail construction increased by 16 percent from 2018 to 2019 but remains well below historic levels. Sixty-six new retail projects were completed in 2019 with a combined total of 1.2 million new square feet of rentable space. A 190,000 square foot Walmart in Loudoun County was the largest retail project.

Jurisdictions further from the core of the region have had a higher rates of stand-alone retail construction and only 18 percent of new retail stand-alone retail space was within a half-mile walk of a Metro station in 2019. 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 - 2019



The overall regional vacancy rate for retail space was about four percent at the end of 2019. 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 2019

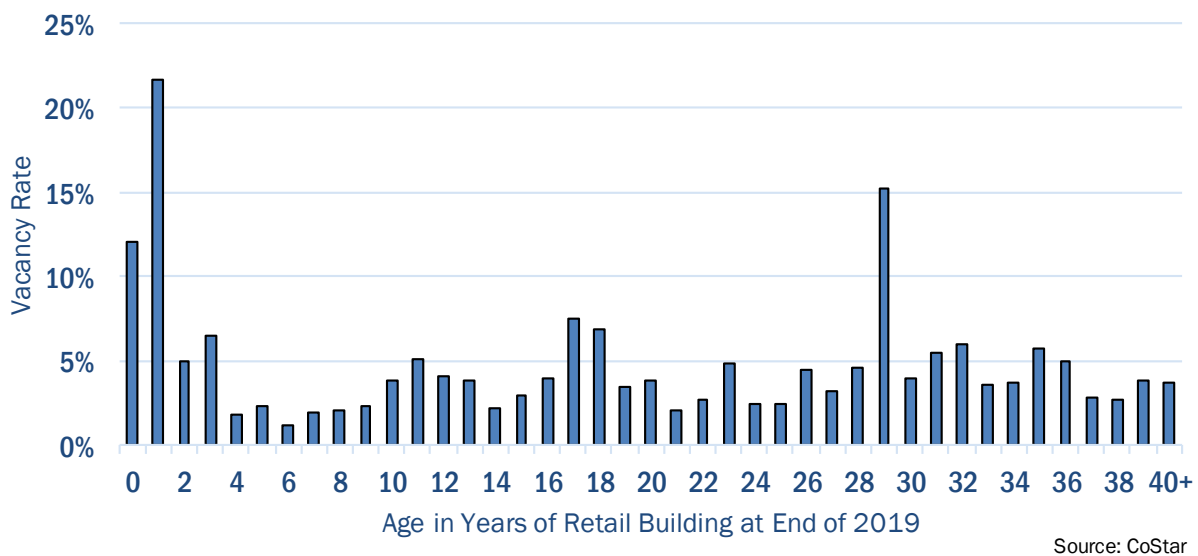
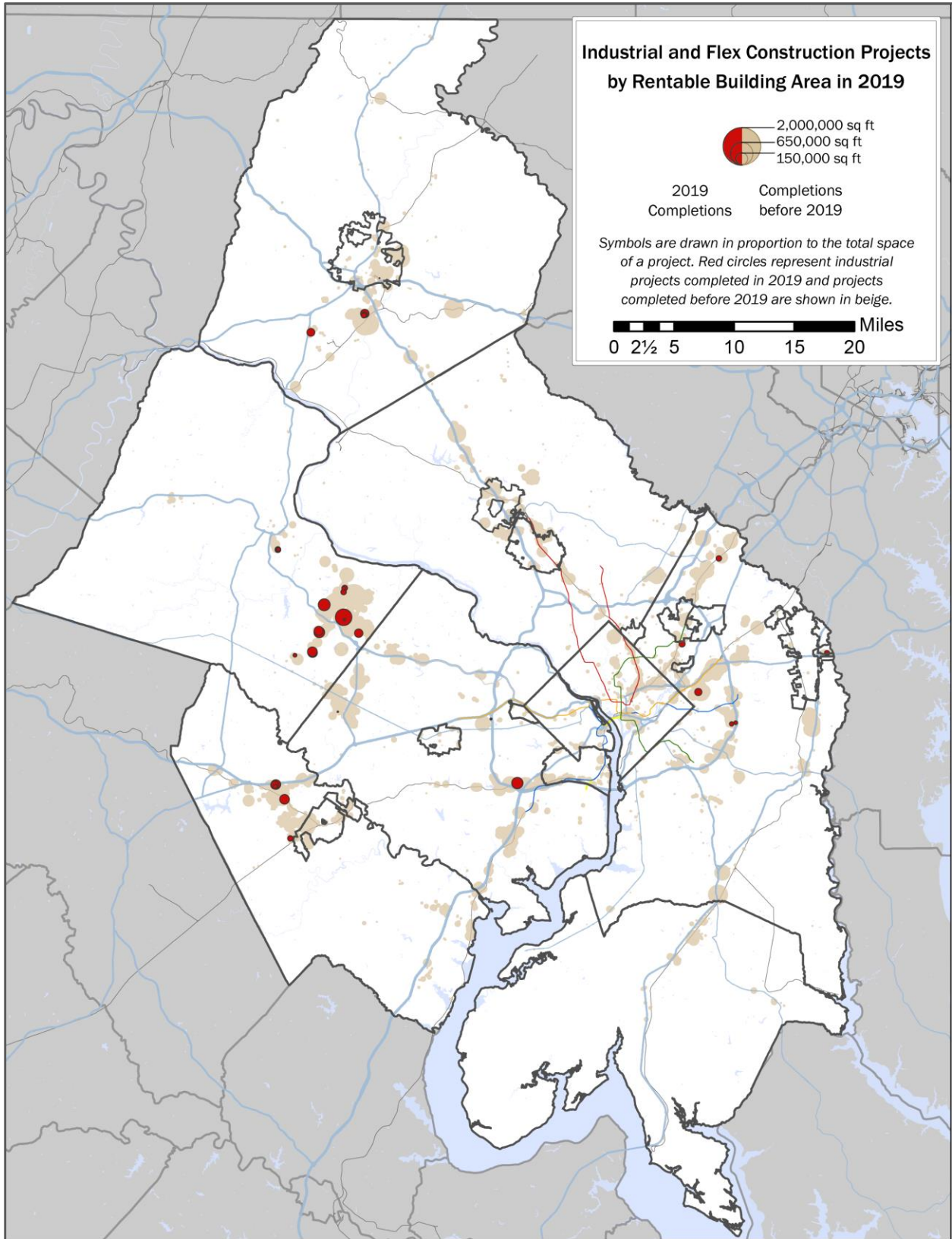


Figure 21

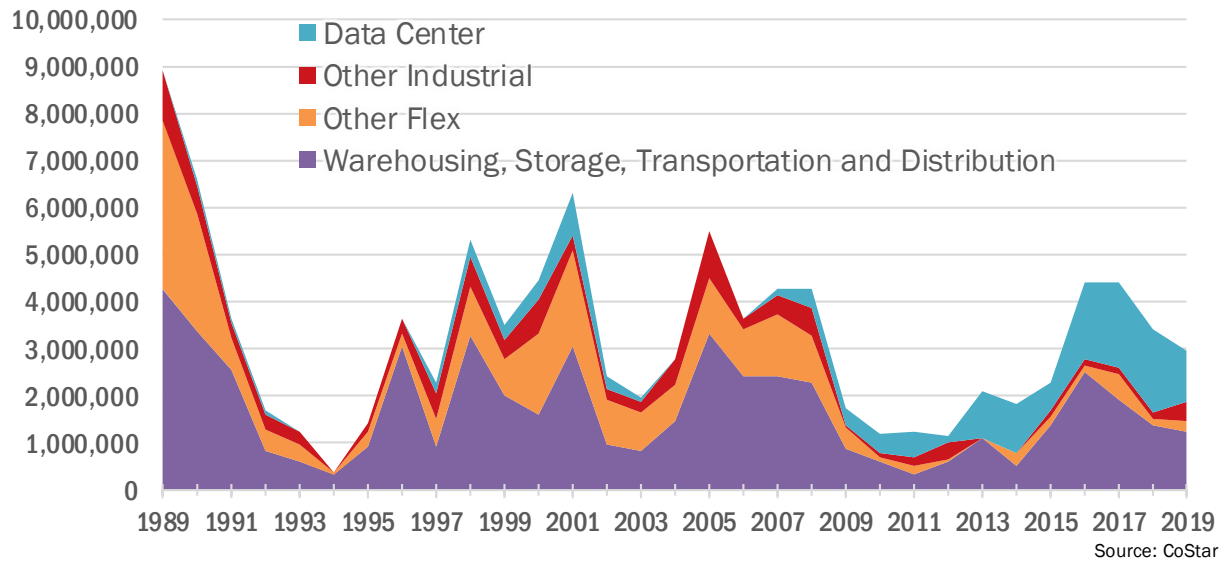


Source: CoStar

Industrial/Flex Construction

Construction of new industrial and flex space declined by 14 percent from 2018 to 2019. In 2019, just under three million square feet of industrial or flex space was completed from 36 projects. The three-story, 427,320 square foot, QTS data center in the Route 28 Central Activity Center in Loudoun County was the largest industrial project.

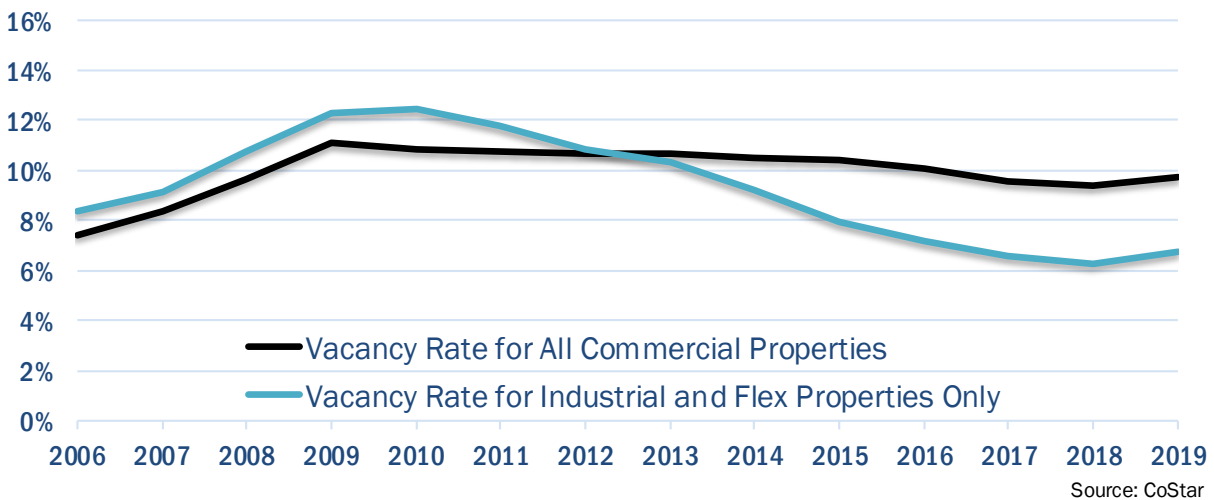
Figure 22. Square Footage of Completed Industrial and Flex Construction by Space Use, 1989 - 2019



Loudoun County hosts more data centers than the rest of the COG jurisdictions combined. Data center construction has increased significantly over the past ten years (Figure 22). The COG region is by far the largest source of data center capacity in the United States and Northern Virginia alone has more capacity than the next four largest data center markets put together.³

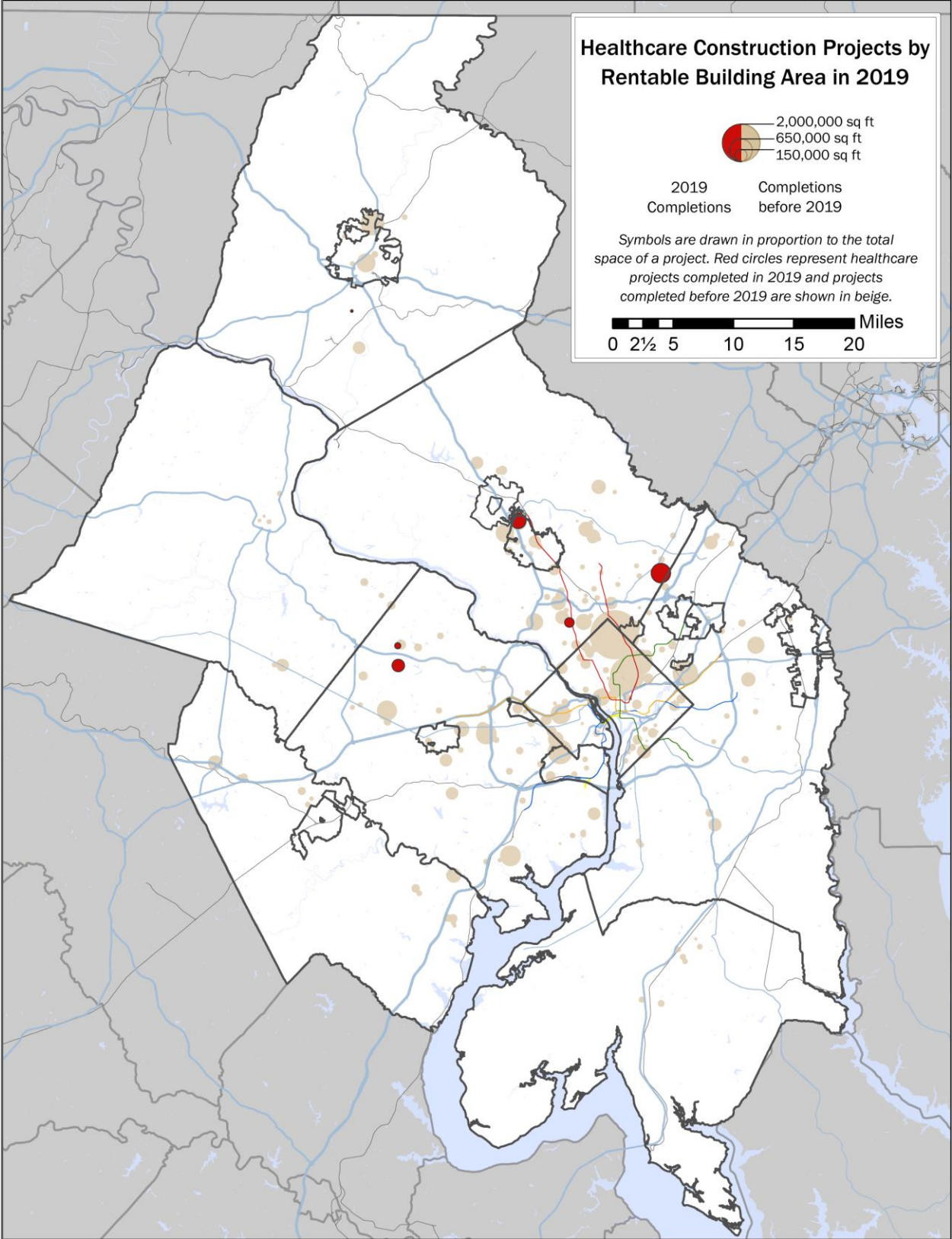
The regional vacancy rate for industrial/flex space was just below seven percent at the end of 2019.

Figure 23. Vacancy Rate for Industrial and Flex Space, 2006 - 2019



³ Carlisle, Candace. "As Big Cities Vie for Data Center Projects, Incentives Heat Up Throughout US." CoStar News, August 13, 2019.

Figure 24



Source: CoStar

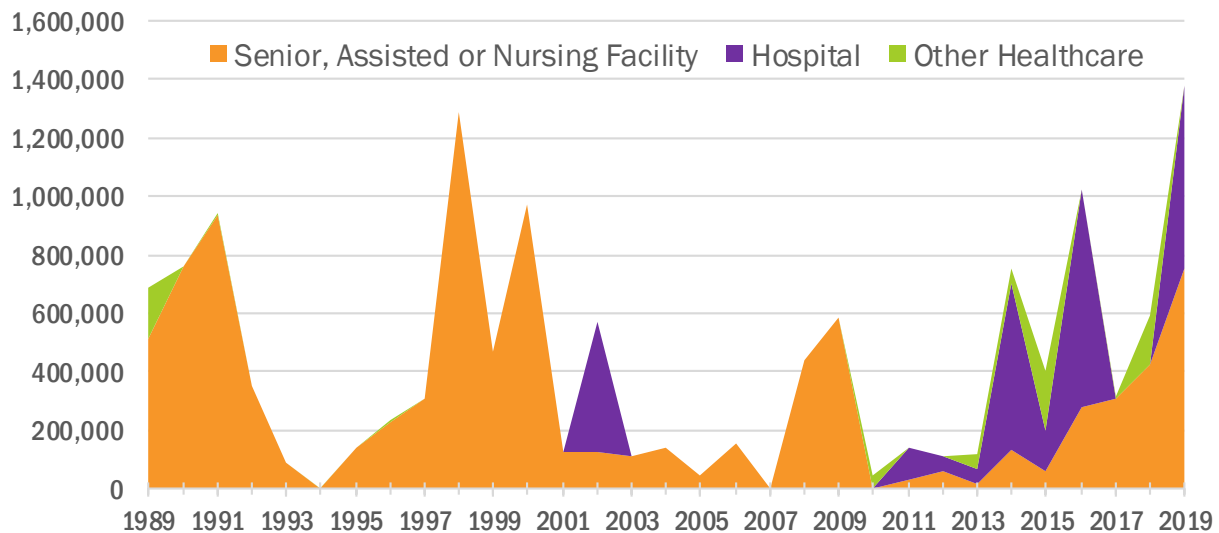
Healthcare Construction

Construction of new healthcare space grew by 134 percent from 2018 to 2019. Seven new healthcare projects were completed in 2019, totaling 1.4 million square feet of space. The healthcare sector is the smallest commercial construction category but was the only major category to add more space in the 2010s than during the previous decade.

Figure 24 on the previous page shows new healthcare facilities completed in 2019. Montgomery County and Fairfax Counties were the only jurisdictions to add new healthcare buildings last year and have received the majority of construction over the past decade. Despite those two counties receiving the lion share of new healthcare space recently, construction has been distributed around the COG region. Since 2010, almost every major jurisdiction has received at least one new healthcare facility; Arlington County was the exception.

The seven-story, 562,730 square foot Washington Adventist Hospital at White Oak Medical Center in Montgomery County was the largest healthcare project in 2019. The new hospital replaces the old Washington Adventist Hospital in Takoma Park, which had 305,152 square feet of space. The location in Takoma Park now hosts an urgent care facility.

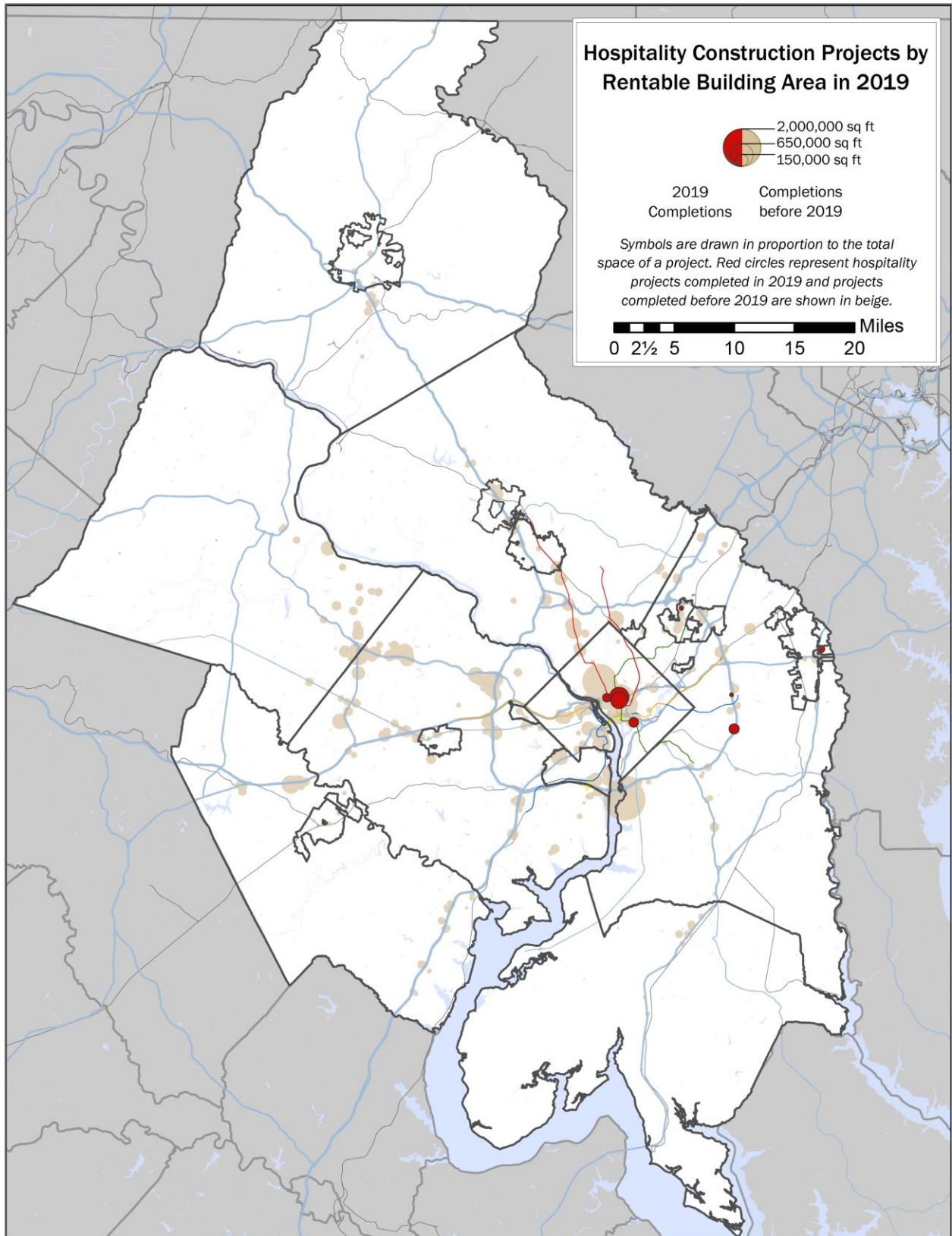
Figure 25. Square Footage of Healthcare Construction by Space Use, 1989 - 2019



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 decade, hospitals and health centers were the most common construction subcategory, shown in purple 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

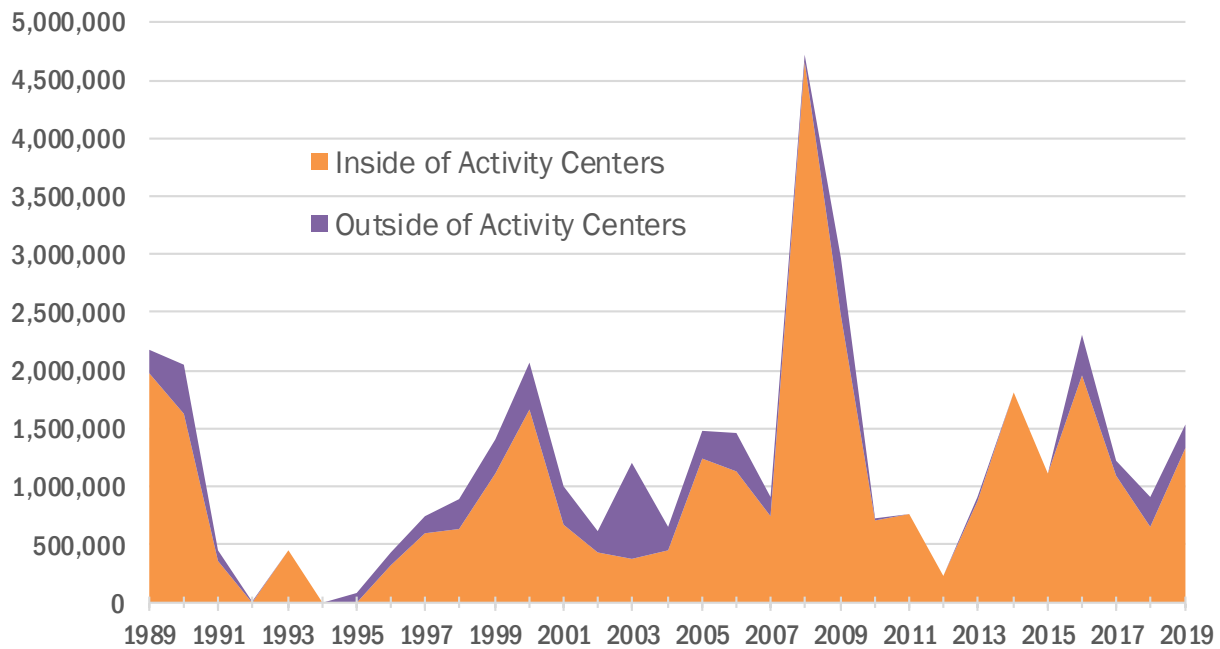


Source: CoStar

Hospitality Construction

Construction of new hospitality space increased 69 percent from 2018 to 2019. Figure 26 on the previous page shows the eight new hospitality projects completed in 2019, adding 1.5 million square feet of hospitality space. Both Prince George’s County and the District of Columbia added four hotels. Marriott’s new 504-room hotel at Columbia Place across from the Walter E. Washington Convention Center in the District of Columbia was the largest project.

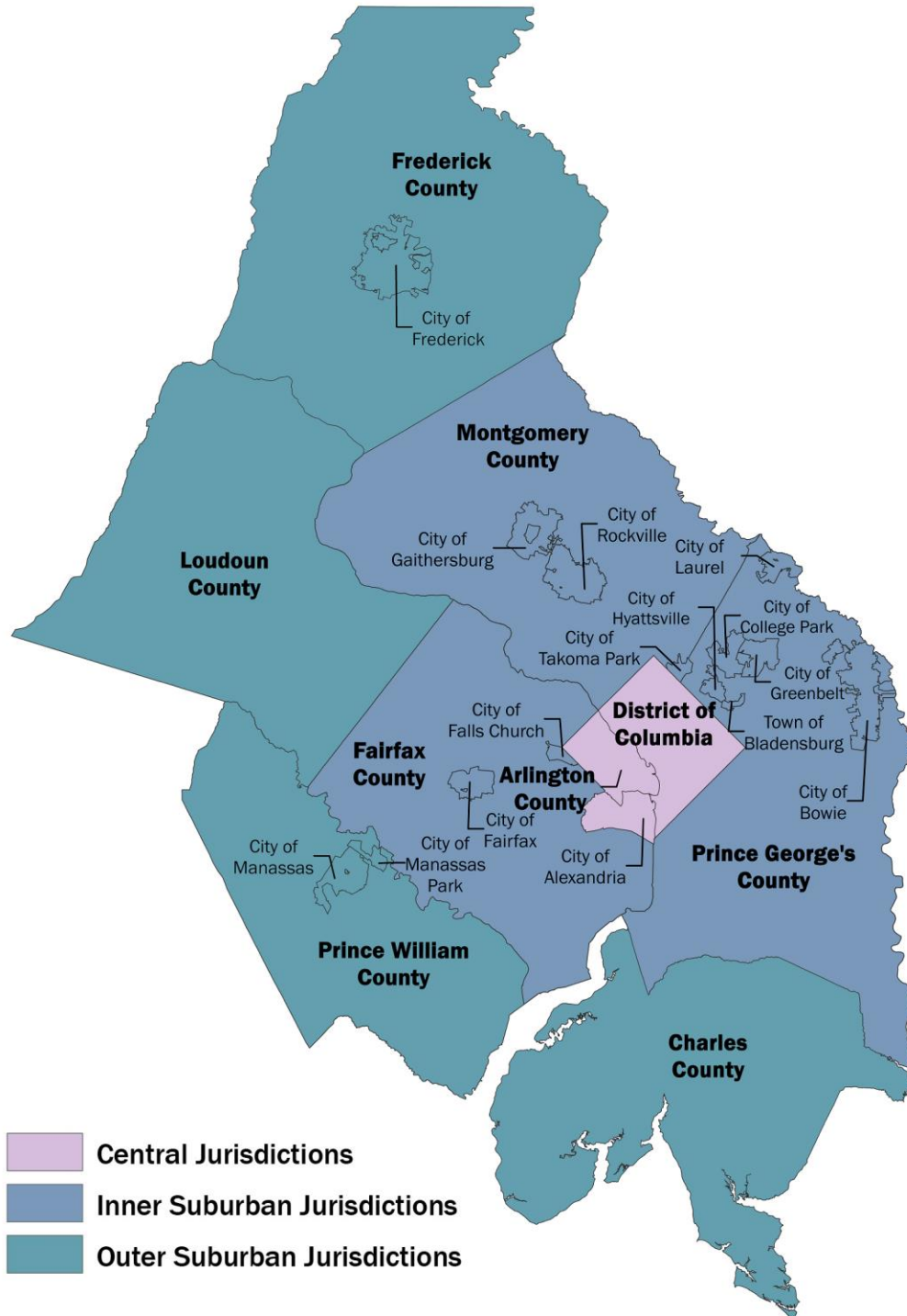
Figure 27. Square Footage of Completed Hospitality Construction in Activity Centers, 1989 - 2019



Source: CoStar

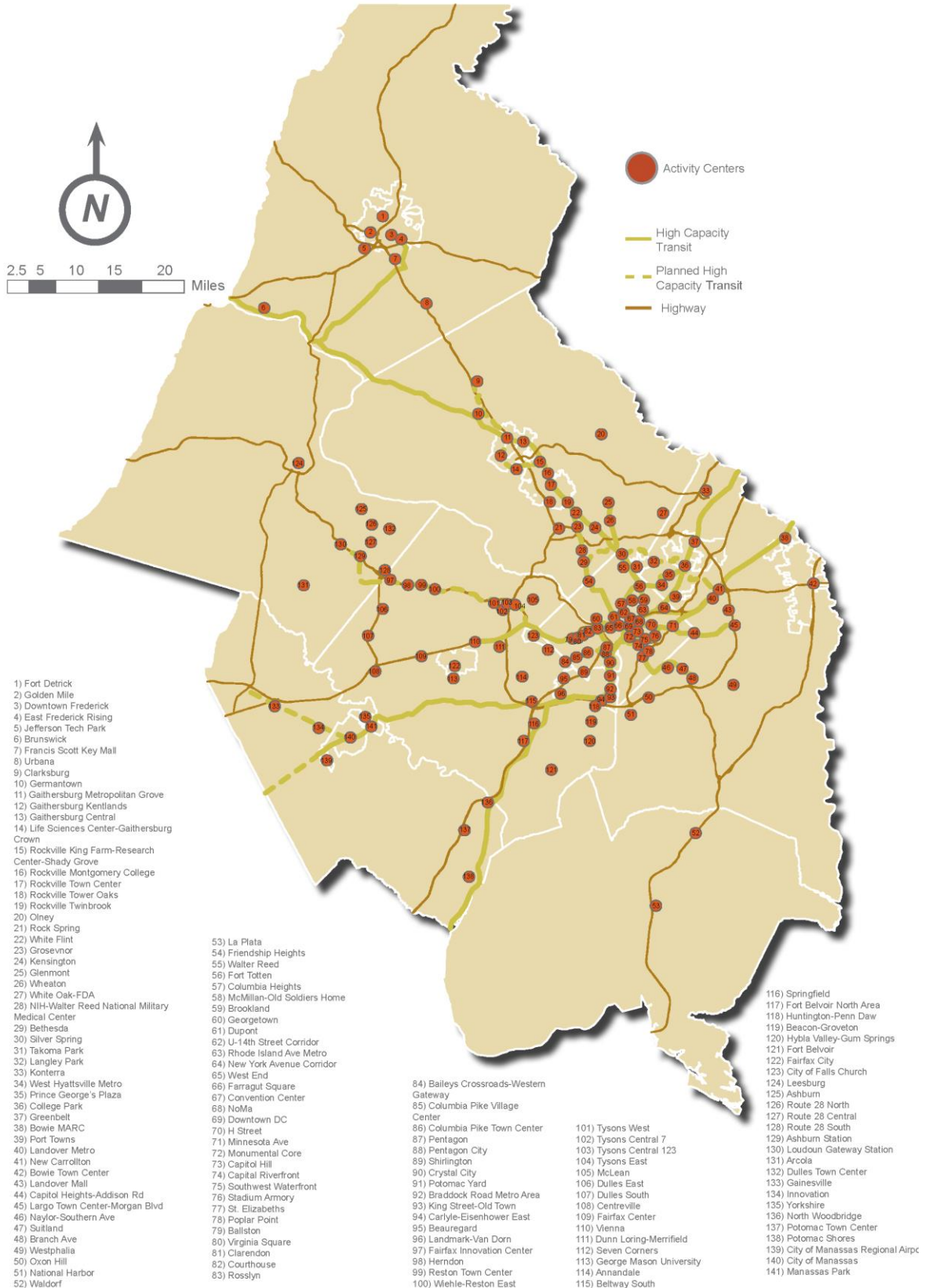
The hospitality sector is highly concentrated in Activity Centers. Figure 27 above shows total hospitality construction, with space inside Activity Centers in orange. The large increase in construction in 2008 was due to the completion of the Gaylord National Resort & Convention Center at National Harbor in Prince George’s County. Since 2010, 92 percent of all new hospitality space has been sited inside an Activity Center, the largest share of any major commercial sector.

APPENDIX A. MAP OF REGIONAL “RING” JURISDICTIONAL GROUPINGS



APPENDIX B. REGIONAL ACTIVITY CENTERS MAP

Submitted to COG Board for Approval January 13, 2013



APPENDIX C. ACTIVITY CENTER TOTALS

Activity Center	Built Prior to 2019			2019 Completions			2019 Year End Vacancy Rate		
	Buildings	Square Feet	Share	Buildings	Square Feet	Share	Office	Retail	Industrial/Flex
Annandale	191	2,727,329	0.2%	0	0	0.0%	17.3%	0.5%	0.0%
Arcola	22	1,455,410	0.1%	0	0	0.0%	15.7%	0.0%	0.0%
Ashburn	76	3,371,920	0.3%	5	91,779	0.7%	7.8%	2.1%	3.0%
Ashburn Station	81	7,182,522	0.6%	1	226,577	1.8%	14.4%	2.5%	7.0%
Baileys Crossroads-Western Gateway	182	7,257,859	0.6%	0	0	0.0%	36.0%	2.8%	1.5%
Ballston	65	9,853,046	0.9%	0	0	0.0%	21.4%	8.4%	0.0%
Beacon-Groveton	37	770,990	0.1%	0	0	0.0%	5.9%	0.0%	0.0%
Beauregard	56	6,194,947	0.5%	0	0	0.0%	15.7%	1.7%	0.0%
Beltway South	104	5,438,259	0.5%	2	296,377	2.3%	14.4%	0.0%	4.9%
Bethesda	433	13,720,485	1.2%	3	434,734	3.4%	13.3%	3.6%	0.0%
Bowie MARC	1	9,222	0.0%	0	0	0.0%	--	--	--
Bowie Town Center	115	4,339,900	0.4%	3	156,224	1.2%	13.5%	8.4%	25.6%
Braddock Road Metro Area	446	6,507,078	0.6%	0	0	0.0%	13.0%	1.4%	0.0%
Branch Ave	33	1,420,380	0.1%	0	0	0.0%	28.2%	0.0%	0.0%
Brookland	195	2,415,456	0.2%	0	0	0.0%	0.0%	1.4%	0.0%
Brunswick	38	415,006	0.0%	0	0	0.0%	39.6%	12.7%	0.0%
Capitol Heights-Addison Rd	130	917,691	0.1%	0	0	0.0%	13.2%	6.1%	25.3%
Capitol Hill	286	6,081,299	0.5%	0	0	0.0%	7.1%	9.2%	0.0%
Capitol Riverfront	210	3,305,932	0.3%	1	140,000	1.1%	0.7%	5.8%	0.0%
Carlyle-Eisenhower East	103	6,769,160	0.6%	0	0	0.0%	10.4%	8.6%	0.0%
Centreville	82	2,327,514	0.2%	0	0	0.0%	5.5%	0.9%	--
City of Falls Church	285	4,353,787	0.4%	0	0	0.0%	8.5%	4.8%	2.2%
City of Manassas	574	8,128,581	0.7%	1	4,800	0.0%	3.8%	6.3%	4.4%
City of Manassas Regional Airport	76	2,304,024	0.2%	0	0	0.0%	5.4%	0.0%	0.5%
Clarendon	84	2,540,500	0.2%	0	0	0.0%	10.0%	7.2%	0.0%
Clarksburg	46	2,099,663	0.2%	0	0	0.0%	10.4%	2.6%	7.5%
College Park	30	2,196,589	0.2%	1	57,120	0.5%	7.9%	4.0%	19.3%
Columbia Heights	458	3,503,869	0.3%	1	2,440	0.0%	8.3%	3.8%	0.0%
Columbia Pike Town Center	57	1,295,585	0.1%	0	0	0.0%	5.2%	5.2%	--
Columbia Pike Village Center	32	216,075	0.0%	1	82,000	0.6%	0.0%	14.3%	--
Courthouse	70	5,069,717	0.4%	1	12,400	0.1%	16.0%	0.0%	--
Crystal City	92	15,663,789	1.4%	0	0	0.0%	13.6%	0.0%	0.0%

Activity Center	Built Prior to 2019			2019 Completions			2019 Year End Vacancy Rate		
	Buildings	Square Feet	Share	Buildings	Square Feet	Share	Office	Retail	Industrial/Flex
Downtown DC	493	34,861,092	3.0%	5	2,297,220	18.1%	13.3%	8.5%	0.0%
Downtown Frederick	678	5,902,019	0.5%	0	0	0.0%	4.6%	6.0%	22.8%
Dulles East	80	7,415,355	0.6%	0	0	0.0%	5.0%	4.2%	12.7%
Dulles South	378	21,949,155	1.9%	5	43,460	0.3%	16.7%	2.0%	9.1%
Dulles Town Center	167	7,380,672	0.6%	0	0	0.0%	27.1%	7.3%	3.7%
Dunn Loring-Merrifield	282	16,226,554	1.4%	1	8,600	0.1%	15.2%	1.3%	7.7%
Dupont	708	19,117,616	1.7%	3	393,341	3.1%	14.9%	4.7%	0.0%
East Frederick Rising	194	3,633,936	0.3%	1	2,000	0.0%	2.6%	0.0%	5.4%
Fairfax Center	149	13,173,012	1.1%	0	0	0.0%	24.3%	2.6%	--
Fairfax City	513	9,759,416	0.8%	0	0	0.0%	11.1%	5.7%	2.9%
Fairfax Innovation Center	49	6,696,849	0.6%	0	0	0.0%	24.2%	0.0%	0.0%
Farragut Square	447	64,855,711	5.6%	2	206,671	1.6%	13.5%	4.0%	--
Fort Belvoir	9	668,762	0.1%	0	0	0.0%	--	--	--
Fort Belvoir North Area	279	10,001,340	0.9%	0	0	0.0%	48.0%	0.0%	11.8%
Fort Detrick	32	625,568	0.1%	0	0	0.0%	3.8%	0.8%	--
Fort Totten	38	925,955	0.1%	0	0	0.0%	0.0%	0.0%	3.3%
Francis Scott Key Mall	327	10,246,406	0.9%	1	1,850	0.0%	15.0%	1.9%	6.8%
Friendship Heights	200	7,658,936	0.7%	0	0	0.0%	13.6%	8.3%	0.0%
Gainesville	100	3,086,715	0.3%	2	163,000	1.3%	23.2%	1.3%	3.2%
Gaithersburg Central	203	3,806,195	0.3%	0	0	0.0%	11.2%	1.1%	2.8%
Gaithersburg Kentlands	117	3,387,180	0.3%	0	0	0.0%	0.8%	3.9%	0.0%
Gaithersburg Metropolitan Grove	35	2,744,830	0.2%	0	0	0.0%	6.1%	0.0%	7.3%
George Mason University	2	339,133	0.0%	0	0	0.0%	--	--	--
Georgetown	330	3,428,776	0.3%	0	0	0.0%	6.2%	6.0%	0.0%
Germantown	187	8,544,005	0.7%	0	0	0.0%	19.6%	1.8%	2.5%
Glenmont	21	818,209	0.1%	0	0	0.0%	--	2.3%	--
Golden Mile	161	3,280,861	0.3%	0	0	0.0%	0.8%	21.1%	0.8%
Greenbelt	15	149,575	0.0%	0	0	0.0%	51.0%	0.0%	0.0%
Grosvenor	1	6,000	0.0%	0	0	0.0%	--	0.0%	--
H Street	300	1,770,324	0.2%	1	5,280	0.0%	0.0%	6.0%	0.0%
Herndon	104	9,026,168	0.8%	0	0	0.0%	9.8%	11.0%	17.3%
Huntington-Penn Daw	58	1,073,992	0.1%	0	0	0.0%	11.6%	0.4%	--
Hybla Valley-Gum Springs	66	1,469,487	0.1%	0	0	0.0%	0.0%	5.7%	0.0%
Innovation	35	1,721,917	0.1%	0	0	0.0%	0.6%	1.1%	4.6%
Jefferson Tech Park	35	480,519	0.0%	0	0	0.0%	23.0%	0.0%	1.7%
Kensington	210	2,327,088	0.2%	1	7,700	0.1%	5.2%	0.1%	5.5%

Activity Center	Built Prior to 2019			2019 Completions			2019 Year End Vacancy Rate		
	Buildings	Square Feet	Share	Buildings	Square Feet	Share	Office	Retail	Industrial/Flex
King Street-Old Town	595	8,294,002	0.7%	0	0	0.0%	14.6%	2.9%	0.0%
Konterra	41	2,567,097	0.2%	0	0	0.0%	21.5%	1.5%	0.4%
La Plata	164	1,988,127	0.2%	0	0	0.0%	4.8%	3.6%	3.1%
Landmark-Van Dorn	145	7,147,776	0.6%	0	0	0.0%	66.1%	33.2%	5.9%
Landover Mall	81	3,553,800	0.3%	2	13,601	0.1%	3.3%	10.5%	1.2%
Landover Metro	137	6,856,106	0.6%	0	0	0.0%	0.0%	5.2%	4.6%
Langley Park	59	1,099,065	0.1%	0	0	0.0%	25.8%	4.3%	--
Largo Town Center-Morgan Blvd	204	6,091,774	0.5%	1	20,000	0.2%	0.7%	1.2%	5.9%
Leesburg	452	5,426,706	0.5%	0	0	0.0%	7.4%	2.0%	0.0%
Life Sciences Center-Gaithersburg Crown	121	9,525,343	0.8%	0	0	0.0%	7.7%	0.8%	1.6%
Loudoun Gateway Station	4	756,303	0.1%	0	0	0.0%	--	0.0%	0.0%
Manassas Park	122	2,163,067	0.2%	2	55,000	0.4%	10.1%	6.4%	2.8%
McLean	177	2,640,778	0.2%	0	0	0.0%	10.4%	2.6%	0.0%
McMillan-Old Soldiers Home	61	3,662,243	0.3%	0	0	0.0%	0.0%	1.2%	--
Minnesota Ave	186	1,535,273	0.1%	0	0	0.0%	2.0%	5.1%	1.6%
Monumental Core	52	13,565,041	1.2%	0	0	0.0%	7.9%	0.0%	0.0%
National Harbor	17	5,187,367	0.5%	1	95,000	0.7%	12.0%	0.0%	--
Naylor-Southern Ave	60	1,131,192	0.1%	0	0	0.0%	49.2%	0.9%	0.0%
New Carrollton	169	5,303,536	0.5%	1	215,528	1.7%	13.7%	1.3%	5.6%
New York Avenue Corridor	267	5,876,153	0.5%	2	15,000	0.1%	7.2%	1.8%	10.2%
NIH-Walter Reed Nat'l Mil Medical Ctr	7	107,551	0.0%	0	0	0.0%	0.0%	--	--
NoMa	487	15,225,358	1.3%	1	522,550	4.1%	4.3%	10.0%	0.6%
North Woodbridge	137	1,543,996	0.1%	0	0	0.0%	8.4%	6.5%	0.0%
Olney	108	1,697,913	0.1%	0	0	0.0%	4.9%	1.5%	0.0%
Oxon Hill	91	1,763,967	0.2%	0	0	0.0%	27.4%	2.0%	0.0%
Pentagon	1	218,240	0.0%	0	0	0.0%	--	--	--
Pentagon City	20	3,700,623	0.3%	0	0	0.0%	3.7%	1.6%	0.0%
Poplar Point	200	1,649,569	0.1%	1	2,600	0.0%	1.7%	1.8%	0.0%
Port Towns	390	4,296,958	0.4%	0	0	0.0%	2.5%	4.9%	4.3%
Potomac Shores	16	382,520	0.0%	2	37,519	0.3%	0.0%	1.1%	0.0%
Potomac Town Center	103	4,795,937	0.4%	1	41,050	0.3%	0.0%	2.1%	0.0%
Potomac Yard	154	2,134,710	0.2%	1	100,000	0.8%	0.0%	1.6%	0.0%
Prince George's Plaza	36	3,074,257	0.3%	0	0	0.0%	8.0%	1.5%	--
Reston Town Center	114	14,078,343	1.2%	1	63,000	0.5%	9.1%	3.7%	0.0%
Rhode Island Ave Metro	144	2,649,135	0.2%	0	0	0.0%	0.0%	9.1%	15.5%
Rock Spring	63	9,184,055	0.8%	0	0	0.0%	14.9%	0.5%	--
Rockville King Farm-Research Ctr-Shady Grove	77	1,687,346	0.1%	0	0	0.0%	13.1%	3.1%	4.8%
Rockville Montgomery College	137	3,547,666	0.3%	0	0	0.0%	5.6%	3.8%	5.2%

Activity Center	Built Prior to 2019			2019 Completions			2019 Year End Vacancy Rate		
	Buildings	Square Feet	Share	Buildings	Square Feet	Share	Office	Retail	Industrial/Flex
Rockville Tower Oaks	11	929,574	0.1%	0	0	0.0%	31.1%	--	0.0%
Rockville Town Center	205	4,932,833	0.4%	0	0	0.0%	8.9%	3.9%	10.2%
Rockville Twinbrook	236	8,236,002	0.7%	0	0	0.0%	8.9%	6.7%	9.2%
Rosslyn	64	11,948,002	1.0%	0	0	0.0%	17.2%	0.0%	--
Route 28 Central	143	9,080,059	0.8%	2	437,489	3.4%	10.0%	1.9%	1.6%
Route 28 North	0	0	0.0%	0	0	0.0%	--	--	--
Route 28 South	117	5,177,412	0.5%	1	110,000	0.9%	23.4%	5.0%	4.0%
Seven Corners	68	2,576,643	0.2%	0	0	0.0%	17.4%	1.4%	--
Shirlington	16	994,549	0.1%	0	0	0.0%	2.4%	2.0%	--
Silver Spring	396	12,802,990	1.1%	1	27,600	0.2%	16.3%	2.8%	1.6%
Southwest Waterfront	76	4,947,383	0.4%	1	124,928	1.0%	16.4%	0.0%	0.0%
Springfield	131	5,404,338	0.5%	0	0	0.0%	10.1%	1.3%	0.0%
St. Elizabeth's	31	652,145	0.1%	0	0	0.0%	10.7%	0.0%	0.0%
Stadium Armory	113	1,004,573	0.1%	0	0	0.0%	0.9%	1.0%	0.0%
Suitland	88	708,976	0.1%	0	0	0.0%	26.0%	2.0%	0.0%
Takoma Park	106	993,376	0.1%	1	2,790	0.0%	7.0%	1.3%	0.0%
Tysons Central 123	145	18,565,292	1.6%	1	64,800	0.5%	13.9%	0.0%	--
Tysons Central 7	43	6,118,949	0.5%	4	725,075	5.7%	19.8%	7.7%	--
Tysons East	33	5,715,647	0.5%	0	0	0.0%	10.6%	0.0%	0.0%
Tysons West	89	6,393,394	0.6%	4	41,885	0.3%	15.8%	4.1%	1.7%
U-14th Street Corridor	583	6,068,212	0.5%	3	115,769	0.9%	3.7%	4.4%	11.4%
Urbana	86	1,203,567	0.1%	1	3,000	0.0%	2.2%	3.4%	0.0%
Vienna	2	399,390	0.0%	0	0	0.0%	1.1%	--	--
Virginia Square	55	2,663,691	0.2%	0	0	0.0%	17.1%	0.0%	0.0%
Waldorf	413	8,041,499	0.7%	0	0	0.0%	9.4%	5.2%	26.2%
Walter Reed	132	4,843,039	0.4%	0	0	0.0%	5.8%	1.0%	0.0%
West End	116	16,481,247	1.4%	1	154,000	1.2%	9.8%	1.6%	--
West Hyattsville Metro	61	867,358	0.1%	0	0	0.0%	1.7%	1.4%	0.0%
Westphalia	20	904,354	0.1%	0	0	0.0%	0.0%	0.0%	28.5%
Wheaton	186	3,115,014	0.3%	0	0	0.0%	9.3%	1.9%	0.0%
White Flint	166	7,216,939	0.6%	0	0	0.0%	14.1%	3.7%	11.1%
White Oak-FDA	112	5,015,314	0.4%	1	562,730	4.4%	19.7%	0.0%	4.6%
Wiehle-Reston East	136	9,496,397	0.8%	0	0	0.0%	17.4%	0.0%	11.0%
Yorkshire	97	798,063	0.1%	1	21,535	0.2%	23.5%	1.7%	15.9%
<i>Inside of Activity Centers Total</i>	<i>21,368</i>	<i>768,818,026</i>	<i>67.0%</i>	<i>80</i>	<i>8,206,022</i>	<i>64.7%</i>	<i>13.3%</i>	<i>4.3%</i>	<i>6.6%</i>
<i>Outside of Activity Centers Total</i>	<i>16,919</i>	<i>379,463,693</i>	<i>33.0%</i>	<i>80</i>	<i>4,478,376</i>	<i>35.3%</i>	<i>12.2%</i>	<i>4.6%</i>	<i>6.7%</i>
Regional Total	38,287	1,148,281,719	100.0%	160	12,684,398	100.0%	13.1%	4.4%	6.7%

Source: CoStar, COG

APPENDIX D. METRO STATION WALKSHED TOTALS

Metrorail Station Half-Mile Walkshed	Built Prior to 2019			2019 Completions			Percent Built Since Station Opened	2019 Year End Vacancy Rate
	Buildings	Square Feet	Share	Buildings	Square Feet	Share		
Addison Road-Seat Pleasant	21	219,485	0.0%	0	0	0.0%	81.9%	4.9%
Anacostia	61	752,726	0.1%	0	0	0.0%	34.0%	0.3%
Archives-Navy Mem-Penn Qtr	152	18,351,601	1.6%	0	0	0.0%	63.9%	13.2%
Arlington Cemetery	0	0	0.0%	0	0	0.0%	--	--
Ballston-MU	81	11,007,171	1.0%	0	0	0.0%	89.5%	19.8%
Benning Road	29	323,112	0.0%	0	0	0.0%	57.0%	0.0%
Bethesda	328	11,030,863	1.0%	2	299,413	2.4%	54.2%	11.1%
Braddock Road	59	887,687	0.1%	0	0	0.0%	70.9%	4.9%
Branch Avenue	5	212,343	0.0%	0	0	0.0%	26.8%	0.7%
Brookland-CUA	113	1,300,381	0.1%	0	0	0.0%	29.6%	0.7%
Capitol Heights	66	371,843	0.0%	0	0	0.0%	23.5%	20.5%
Capitol South	103	2,063,307	0.2%	0	0	0.0%	16.0%	2.2%
Cheverly	20	145,364	0.0%	0	0	0.0%	8.8%	0.0%
Clarendon	151	3,875,694	0.3%	0	0	0.0%	73.8%	10.0%
Cleveland Park	36	375,234	0.0%	0	0	0.0%	0.0%	6.0%
College Park-Univ of Maryland	32	711,523	0.1%	0	0	0.0%	11.3%	1.7%
Columbia Heights	196	1,930,651	0.2%	1	2,440	0.0%	41.5%	3.8%
Congress Heights	16	332,594	0.0%	0	0	0.0%	78.9%	0.0%
Court House	96	5,995,121	0.5%	1	12,400	0.1%	82.0%	15.2%
Crystal City	72	10,101,988	0.9%	0	0	0.0%	56.3%	11.4%
Deanwood	67	623,464	0.1%	0	0	0.0%	12.0%	0.6%
Dunn Loring-Merrifield	21	1,249,614	0.1%	0	0	0.0%	79.7%	16.3%
Dupont Circle	629	27,828,292	2.4%	4	498,341	3.9%	39.0%	13.3%
East Falls Church	6	148,768	0.0%	0	0	0.0%	38.5%	0.0%
Eastern Market	320	2,483,653	0.2%	0	0	0.0%	20.0%	8.0%
Eisenhower Avenue	18	3,675,599	0.3%	0	0	0.0%	76.4%	14.9%
Farragut North	481	54,020,751	4.7%	5	736,012	5.8%	51.8%	13.8%
Farragut West	440	54,263,658	4.7%	4	464,579	3.7%	51.8%	11.2%
Federal Center SW	23	7,794,860	0.7%	0	0	0.0%	73.4%	7.0%
Federal Triangle	103	19,807,880	1.7%	0	0	0.0%	69.8%	12.9%
Foggy Bottom-GWU	156	21,580,094	1.9%	1	154,000	1.2%	61.0%	13.1%
Forest Glen	10	129,558	0.0%	0	0	0.0%	0.0%	1.7%
Fort Totten	20	339,133	0.0%	0	0	0.0%	45.7%	2.7%
Franconia-Springfield	0	0	0.0%	0	0	0.0%	--	--
Friendship Heights	93	5,468,423	0.5%	0	0	0.0%	56.4%	13.4%

Metrorail Station Half-Mile Walkshed	Built Prior to 2019			2019 Completions			Percent Built Since Station Opened	2019 Year End Vacancy Rate
	Buildings	Units	Share	Buildings	Units	Share		
Gallery Place-Chinatown	357	40,777,045	3.6%	4	1,728,299	13.6%	76.2%	12.5%
Georgia Ave-Petworth	225	1,434,624	0.1%	1	4,761	0.0%	17.3%	2.2%
Glenmont	19	788,517	0.1%	0	0	0.0%	79.0%	2.3%
Greenbelt	0	0	0.0%	0	0	0.0%	--	--
Greensboro	42	4,194,129	0.4%	4	725,075	5.7%	14.9%	9.6%
Grosvenor-Strathmore	0	0	0.0%	0	0	0.0%	--	--
Huntington	12	181,536	0.0%	0	0	0.0%	9.4%	4.7%
Judiciary Square	266	21,269,062	1.9%	0	0	0.0%	69.9%	10.1%
King Street-Old Town	268	7,150,133	0.6%	0	0	0.0%	87.9%	11.1%
Landover	7	599,230	0.1%	0	0	0.0%	24.8%	27.6%
Largo Town Center	21	820,101	0.1%	0	0	0.0%	57.8%	14.3%
L'Enfant Plaza	40	12,255,597	1.1%	0	0	0.0%	73.0%	9.7%
McLean	19	4,078,362	0.4%	0	0	0.0%	32.6%	1.0%
McPherson Square	355	56,851,473	5.0%	2	514,671	4.1%	61.5%	13.9%
Medical Center	9	485,148	0.0%	0	0	0.0%	85.1%	0.5%
Metro Center	287	43,496,470	3.8%	3	970,299	7.6%	74.7%	14.2%
Minnesota Avenue	58	624,343	0.1%	0	0	0.0%	22.1%	0.4%
Morgan Boulevard	0	0	0.0%	0	0	0.0%	--	--
Mt Vernon Sq-7th St-Convention Ctr	373	12,625,597	1.1%	5	2,297,220	18.1%	72.3%	12.5%
Navy Yard-Ballpark	64	6,554,183	0.6%	2	264,928	2.1%	79.5%	8.5%
Naylor Road	21	249,247	0.0%	0	0	0.0%	0.0%	0.0%
New Carrollton	13	1,004,088	0.1%	1	215,528	1.7%	99.9%	9.8%
NOMA-Gallaudet	80	3,845,538	0.3%	1	522,550	4.1%	75.5%	1.4%
Pentagon	3	678,854	0.1%	0	0	0.0%	100.0%	0.0%
Pentagon City	22	4,250,704	0.4%	0	0	0.0%	95.7%	2.2%
Potomac Avenue	146	758,944	0.1%	0	0	0.0%	6.8%	1.3%
Prince George's Plaza	24	2,369,785	0.2%	0	0	0.0%	39.2%	5.0%
Rhode Island Ave-Brentwood	46	907,147	0.1%	0	0	0.0%	39.0%	12.1%
Rockville	113	3,495,152	0.3%	0	0	0.0%	62.8%	8.1%
Ronald Reagan Wash. National Airt	1	31,200	0.0%	0	0	0.0%	0.0%	0.0%
Rosslyn	57	11,596,534	1.0%	0	0	0.0%	59.1%	17.1%
Shady Grove	22	265,617	0.0%	0	0	0.0%	20.1%	11.5%
Shaw-Howard Univ	483	4,025,868	0.4%	1	6,564	0.1%	13.6%	5.0%
Silver Spring	156	9,712,427	0.8%	0	0	0.0%	64.7%	15.2%
Smithsonian	15	4,991,029	0.4%	0	0	0.0%	73.6%	14.6%
Southern Avenue	0	0	0.0%	0	0	0.0%	--	--
Spring Hill	80	5,579,835	0.5%	4	41,885	0.3%	0.7%	11.3%

Metrorail Station Half-Mile Walkshed	Built Prior to 2019			2019 Completions			Percent Built Since Station Opened	2019 Year End Vacancy Rate
	Buildings	Units	Share	Buildings	Units	Share		
Stadium-Armory	31	681,676	0.1%	0	0	0.0%	0.7%	0.9%
Suitland	9	44,940	0.0%	0	0	0.0%	0.0%	0.0%
Takoma	59	757,433	0.1%	0	0	0.0%	3.9%	17.0%
Tenleytown-AU	131	2,395,150	0.2%	0	0	0.0%	31.8%	4.8%
Twinbrook	86	2,824,810	0.2%	0	0	0.0%	54.1%	14.6%
Tysons Corner	32	6,765,230	0.6%	0	0	0.0%	19.1%	4.7%
U St/Afr-Amer Civil War Mem/Cardozo	425	4,766,277	0.4%	3	115,769	0.9%	12.9%	5.3%
Union Station	174	14,367,847	1.3%	0	0	0.0%	65.7%	6.6%
Van Dorn Street	23	839,613	0.1%	0	0	0.0%	0.0%	8.9%
Van Ness-UDC	25	1,649,603	0.1%	0	0	0.0%	59.4%	4.7%
Vienna-Fairfax-GMU	0	0	0.0%	0	0	0.0%	--	--
Virginia Square-GMU	107	4,621,863	0.4%	0	0	0.0%	80.9%	15.2%
Waterfront	22	1,696,775	0.1%	0	0	0.0%	85.5%	5.3%
West Falls Church-VT/UVA	2	105,656	0.0%	0	0	0.0%	0.0%	--
West Hyattsville	39	379,784	0.0%	0	0	0.0%	8.6%	0.0%
Wheaton	176	2,793,866	0.2%	0	0	0.0%	5.5%	3.4%
White Flint	63	3,444,556	0.3%	0	0	0.0%	57.5%	8.4%
Wiehle-Reston East	42	2,893,751	0.3%	0	0	0.0%	13.5%	20.2%
Woodley Park-Zoo/Adams Morgan	45	2,984,957	0.3%	0	0	0.0%	2.7%	2.1%
<i>DC Station Walkshed Totals</i>	<i>4,056</i>	<i>195,725,526</i>	<i>17.0%</i>	<i>19</i>	<i>3,961,680</i>	<i>31.2%</i>	<i>57.2%</i>	<i>11.1%</i>
<i>Maryland Station Walkshed Totals</i>	<i>1,309</i>	<i>45,676,123</i>	<i>4.0%</i>	<i>3</i>	<i>514,941</i>	<i>4.1%</i>	<i>53.7%</i>	<i>10.5%</i>
<i>Virginia Station Walkshed Totals</i>	<i>1,037</i>	<i>81,407,109</i>	<i>7.1%</i>	<i>9</i>	<i>779,360</i>	<i>6.1%</i>	<i>58.4%</i>	<i>12.4%</i>
<i>Inside Walkshed Total</i>	<i>6,402</i>	<i>322,808,758</i>	<i>28.1%</i>	<i>31</i>	<i>5,255,981</i>	<i>41.4%</i>	<i>57.0%</i>	<i>11.4%</i>
<i>Outside Walkshed Total</i>	<i>31,886</i>	<i>825,472,961</i>	<i>71.9%</i>	<i>129</i>	<i>7,428,417</i>	<i>58.6%</i>	<i>69.1%</i>	<i>8.7%</i>
Regional Total	38,288	1,148,281,719	100.0%	160	12,684,398	100.0%	67.5%	9.5%

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 Glossary⁴)

COMMERCIAL CONSTRUCTION PROJECT

A property with one or more completed buildings that allocates the majority of usable space to one of 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).

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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