

## **PUBLIC FACILITIES:**

### **Water and Sewer Service**

The water and sewer categories for the site are W-1 and S-6. There are two WSSC water transmission lines (60" and 36") that bisect the property in a generally east-west direction. Existing water and sewer lines surround the site. The sewer for the proposed development will connect to the existing sewer lines within the stream valley to the west. Water connections should be determined in coordination with WSSC as necessary.

### **Other Utilities**

Electric, gas, cable and telephone run adjacent to the site within the public right-of-ways. The developer would have to contract with these services to extend them into the development. These services along Crown Farm Drive and within the development should be installed below ground.

### **Schools**

The *FY 2007 Educational Facilities Master Plan and FY 2007-2012 Capital Improvements Program* for Montgomery County Public Schools (published June 2004) outlines the following:

- The Crown Farm property is currently in the Gaithersburg cluster with students attending Rosemont Elementary, Gaithersburg Middle School and Gaithersburg High School.
- While the Gaithersburg cluster is found to have capacity under the Montgomery County Annual Growth Schools Test, staff is concerned that Gaithersburg High School is projected to be deficient by between 12 to 59 classroom seats between the 2008-2011 school years. A 16-room classroom addition to the Gaithersburg High School is scheduled to open in August 2006 and the proposed modernization of Gaithersburg High School is scheduled to be completed in September 2012. Gaithersburg Middle School and Rosemont Elementary School have a fair amount of capacity open with up to 292 spaces available at Gaithersburg Middle School and up to 147 available at Rosemont Elementary School between the 2008-2011 school years.

## TRANSPORTATION:

### Transit

A key issue is the alignment for the **Corridor Cities Transitway (CCT)**. The currently approved alignment runs diagonally through the property and has two transit stops. During the charrette process and subsequent discussions, there seems to have been general consensus that an alignment change would be appropriate to better serve the proposed community as well as the existing Washingtonian Center. Staff has held a series of meetings with the CCT project team, and conceptually they appear supportive of an alignment shift.

In addition to modifying the alignment, staff is recommending that the location of the transit station be modified to serve the Washingtonian Center as well as the proposed development on the Crown Farm.

Given that the CCT is not funded at this point and to mitigate site generated trips, staff is recommending that the applicant be required to fund and operate a shuttle bus service, similar to the one in operation at the King Farm community, for a period of 12 years.

### Roads

Staff is recommending that the City analyze transportation capacity issues utilizing Montgomery County's Local Area Process (LAP); however, additional City approved pipeline development approvals including the Washingtonian North and Washingtonian South Office need to be considered. As stated below, a significant number of intersection improvements will be necessary to accommodate traffic generated by the proposed development. Staff recommends that all improvements be specifically identified in and included in the annexation agreement.

The Traffic Group, Inc. has submitted a traffic analysis that evaluated 26 intersections. Staff has requested additional traffic data. Staff is continuing to review the traffic analysis in consultation with Montgomery County Park and Planning staff.

Based on staff review, it appears that intersection improvements will be required for the following locations:

- Sam Eig Highway and Diamondback Drive
- Sam Eig Highway and MD 119
- Shady Grove Road and Darnestown Road
- Fields Road and Washingtonian Boulevard
- Fields Road and Rio Boulevard

Additionally, due to unacceptable critical lane volumes, mitigation strategies must be developed to address the following intersections:

- MD 119 and Muddy Branch Road
- MD 119 and Decoverly Drive
- MD 28 and Shady Grove Road

### **PROPOSED PHASING PLAN:**

Staff recommends that the project be phased over a five to seven year period to mitigate impacts on public facilities. Additionally, the phasing schedule must be developed to ensure appropriate timing of the various intersection improvements that will be required.

### **STAFF RECOMMENDATION:**

Upon the completion of the public work sessions and consequent closing of the public records, staff will provide additional comments to this preliminary analysis.

Staff, as well as the citizens, realizes the importance of this property to the City of Gaithersburg. Staff supports the annexation because this area would compliment the existing Washingtonian and Rio Centers which are currently within the municipal boundaries and would assist in the identity of the municipal boundaries.

Staff recommends that the subject 182.81725 acres of land, known as the Crown Property, be annexed into the City of Gaithersburg and zoned MXD in accordance with the petitioners' request for the following reasons:

- The property is contiguous to the City and follows existing roads.
- Annexation of these parcels will fulfill the City's goal to promote annexation for logically situated parcels and to work towards the creation of more concise and reasonable boundaries. The subject properties are strategically located along an entry area to the City.
- Annexation of these parcels into the City would necessitate submission of the property to additional development review before the Planning Commission immediately following the annexation process. This will provide the City, as well as adjacent citizens, with a convenient opportunity to participate in the development process at the local level. It is staff's opinion that the community's needs would be more effectively and responsively dealt with at the local level as it relates to phasing of development and timing of any required improvements to infrastructure and public facilities.

- These parcels are a reasonable addition to the City's boundaries. Subsequent control by the City over the development will benefit the surrounding properties.

In addition to the normal and customary provisions, staff recommends the following items be included in the annexation agreement:

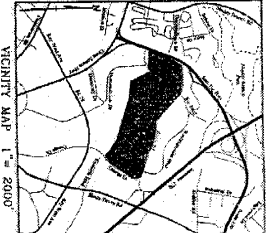
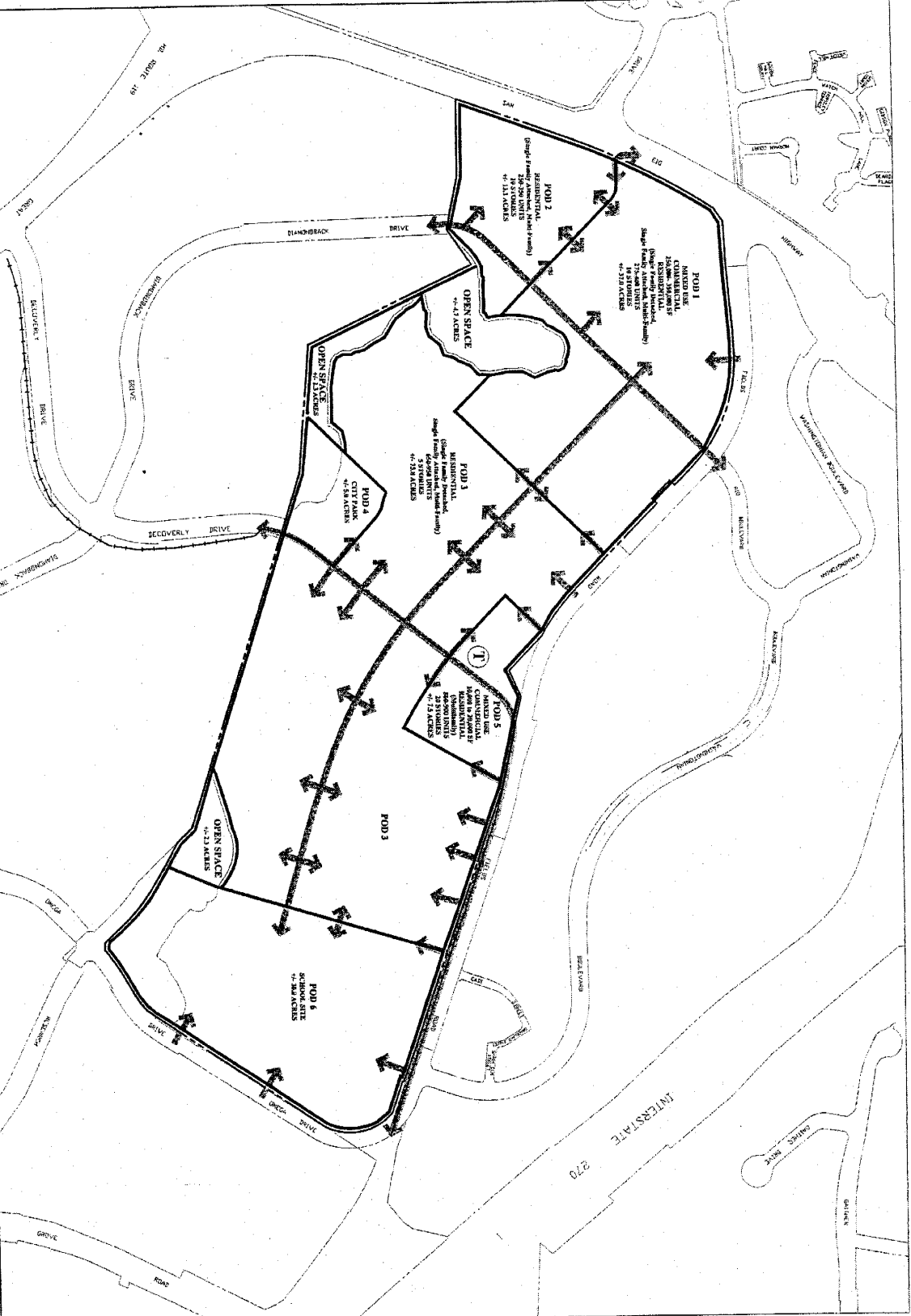
1. Timing of the donation of the 30-acre high school site;
2. The applicant must dedicate 5 acres of land as City parkland;
3. The applicant must dedicate necessary right-of-way for the CCT and accommodate 250 public parking spaces for the proposed transit station;
4. The applicant must make a significant financial contribution for off-site regional recreation amenities;
5. Twelve and one-half percent (12.5%) of the residential dwellings must be designated as affordable housing;
6. The applicant must fund and operate a transit shuttle bus service from the community to the Shady Grove Metro station. This must be funded and operated for a period of 12 years.

Electronic versions of this analysis and all attachments are available at  
[www.gaithersburgmd.gov](http://www.gaithersburgmd.gov)

# THE CROWN PROPERTY

## Vision for a New Community

MXD Concept/Sketch Plan



NOTES:

1. Heights are maximum numbers expressed in stories and feet as follows:  
 5 Story = Max. 75'  
 10 Story = Max. 130'  
 20 Story = Max. 230'
2. Gross Land Area = 131.9 +/- Acres\*  
 Commercial = 4.3 +/- Acres\*  
 Residential = 119.9 +/- Acres\*  
 Research Boulevard = 6.4 +/- Acres\*
3. Land Uses Illustrated:  
 Residential - 1,975 to 2,550 Units  
 Commercial - 260,000 to 570,000 SF\*\*
4. Residential units shall not exceed 0.75 FAR
5. Commercial FAR shall not exceed 0.75 FAR
6. The location of Single Family Detached, Single Family Attached, and Multifamily may be shifted between pods provided the height range of units shown for any pod is not exceeded by 30%.
7. Green area shall not be less than 10% of total area shown for residential use.\*\*\*
8. Green area shall not be less than 25% of total area shown for commercial use.\*\*\*

\* Size of uses identified may be adjusted.  
 \*\* Applicant may opt to include retail or employment uses in commercial. In cases shown as mixed use, commercial and residential land uses are permitted.  
 \*\*\* Applicant may opt to convert commercial square footages shown to residential units to exceed 2,250 units as a commercial factor of 800 SF per unit. For whole site to be provided between residential and commercial including the school site, city park, and all open space areas shown. Mixed use structures shall be considered commercial for green area calculations.

**LEGEND**

- SITE BOUNDARY
- PODLIMITS
- TRANSIT ALIGNMENT
- TRANSIT STATION
- STREAM VALLEY BUFFER
- POSSIBLE STREET CONNECTION

**SHEET INDEX**

**GRAPHIC SCALE**  
 1" = 200'  
 1" = 500'  
 1" = 1,000'

NO.	REVISION	DATE	BY	APPROVED BY:

**APPROVED BY:**  
 Crown Village Farm, LLC  
 COA #1684  
 1504 FIVE  
 VERMONT, VA 20182  
 MR. STEVE CHADWICK

LAND USE PLAN  
 MXD CONCEPT/SKETCH PLAN

**RODGERS CONSULTING**  
 Planning the future of land development.

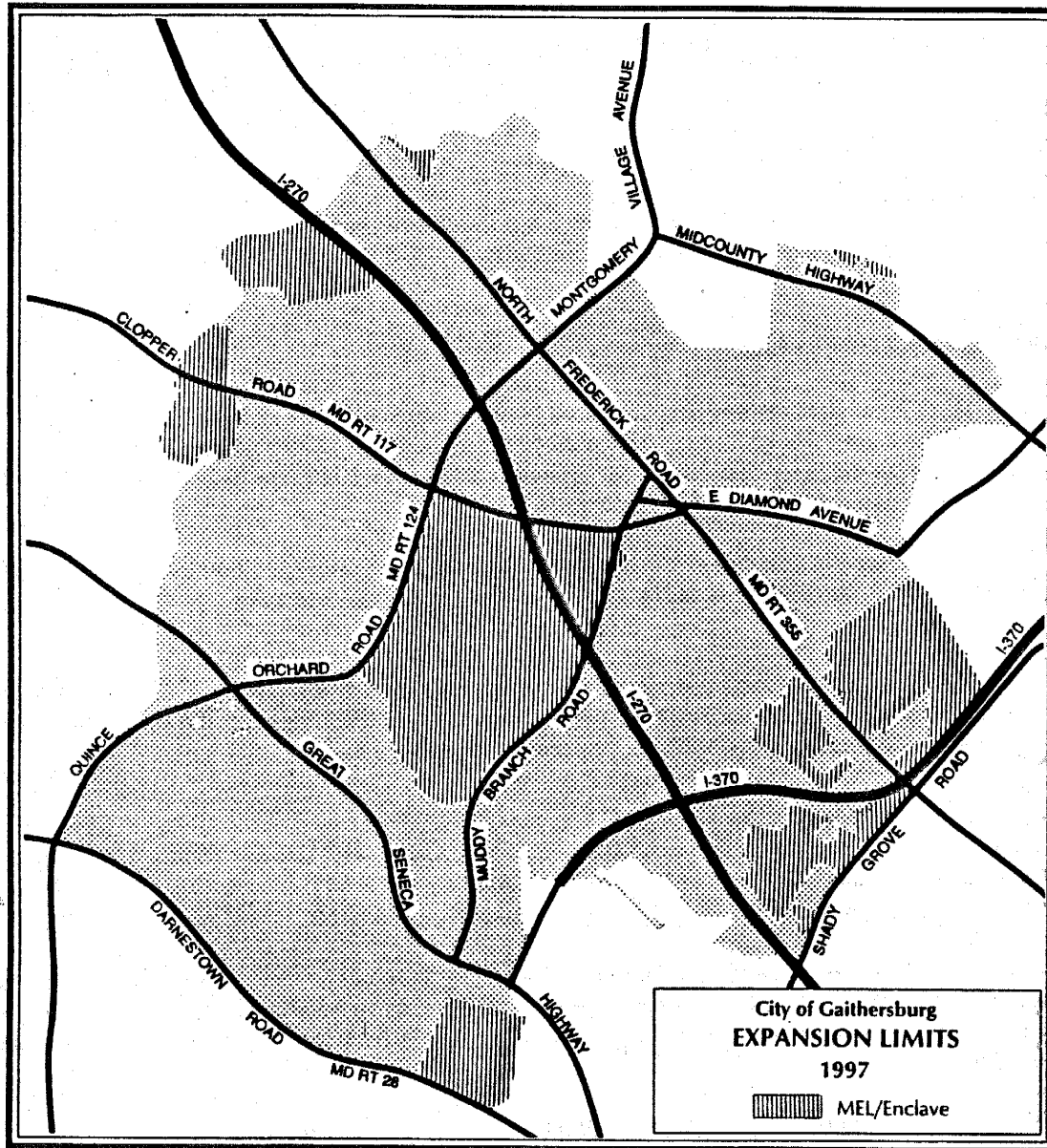
15025 Corporate Blvd. Ste. 200  
 Fairfax, VA 22033  
 (703) 444-1100  
 www.rodgersconsulting.com

DATE	NO. <td>BY <td>APP. </td></td>	BY <td>APP. </td>	APP.
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11/09/10	2		
01/29/11	3		
03/01/11	4		
04/01/11	5		
05/01/11	6		
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12/01/12	25		

**THE CROWN PROPERTY**  
 Vision for a New Community

8716 BELMONT BLVD. SUITE 100  
 MONROE, LOUISIANA 70122  
 (504) 885-2200

MAXIMUM EXPANSION LIMITS



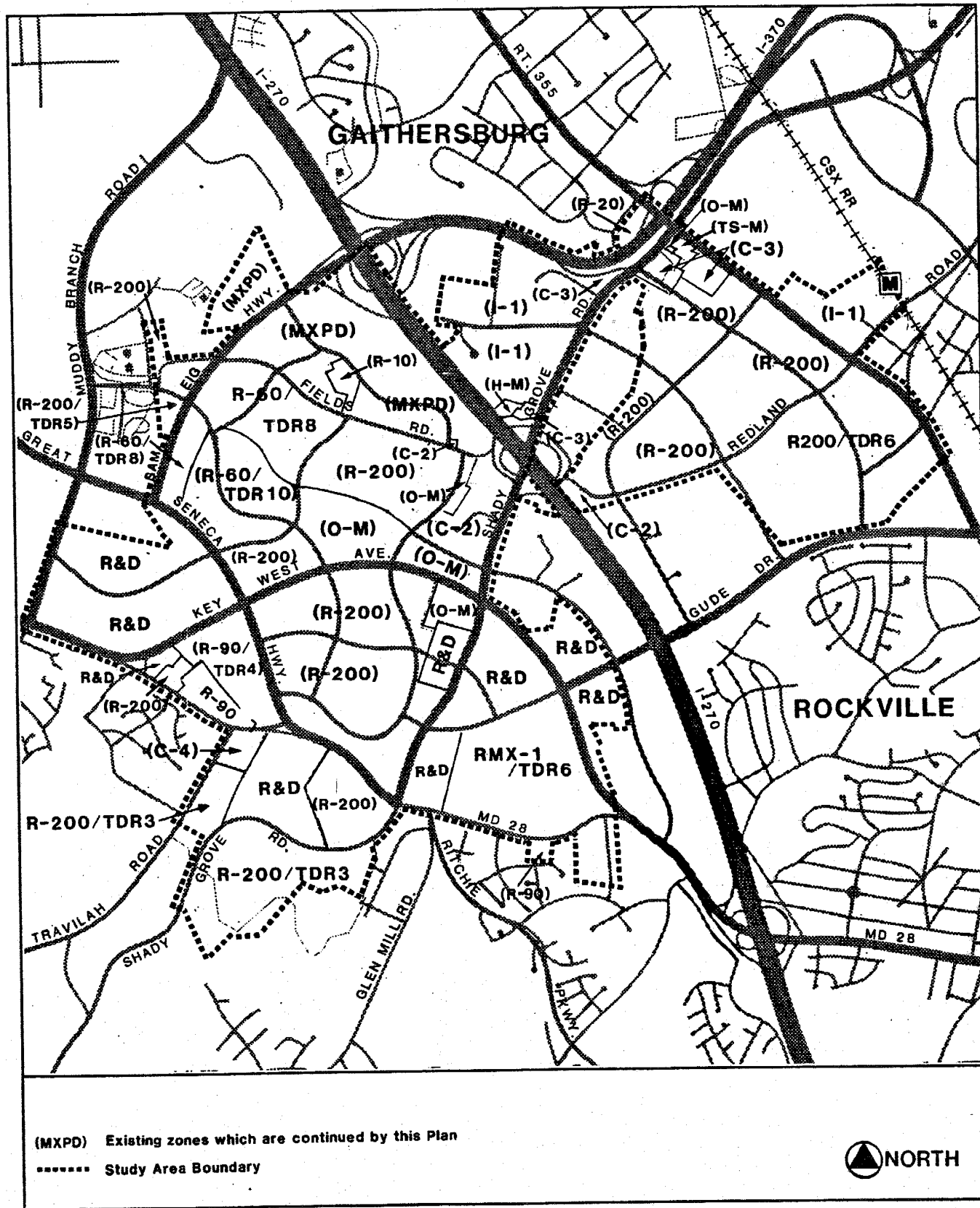
A purpose of the Maximum Expansion Limits (MEL) policy is to set a geographical boundary for growth. Areas that are between the City's corporate limits and the Maximum Expansion Limits may be annexed into the City; however, there is no legal commitment to do so. Maximum Expansion Limits were set unilaterally by City Council Resolution and adopted in 1973. The Maximum Expansion Limits are useful in terms of planning because the City can forecast future service needs as well as determine the service responsibilities between County agencies and the City. Throughout the '80s, the City, in conjunction with the County, envisioned changing the existing MEL's, with the proposed boundary changes to basically follow existing roads instead of following or traversing

private properties, and reflect a more bilateral approach to this issue. Several annexations have already become effective within these proposed MEL's. Additionally, in 1992, the City of Gaithersburg, along with the City of Rockville and Montgomery County, entered into a joint Memorandum of Understanding which established guidelines for a 20-year planning horizon with respect to the land use and required community facilities, capital investment responsibilities, and logical and efficient operating service areas. The most important aspect of this Memorandum was the agreement by the jurisdictions to work cooperatively to develop procedural guidelines for annexation agreements which should include staging components.

Overall, the trend to grow will continue, but the rate of change, even with the new MEL, will be much slower in the 1990s, than during the 1980s.

# Recommended Base Zones at Sectional Map Amendment

Figure 6.2





- Encourage a variety in the types and price range of residential units.
- Encourage a variety of heights in office and residential structures with highest intensity near the linear open space feature.

### Crown Farm

Acreage:	180 acres
Existing Land Use:	Agriculture
Unique Features:	<ul style="list-style-type: none"> <li>• Historic farmstead</li> <li>• Stream valley adjoins southern edge</li> <li>• Some significant tree stands</li> </ul>

### Proposed Land Use Recommendations:

The Plan recommends a land use pattern which would achieve the following mix of uses:

Residential	– 2000 dwelling units
Retail/Commercial	– 50,000 square feet

The Plan recommends a residential land use pattern which locates high-density housing near two proposed transit stops. The western portion of the farm is proposed for lower density housing in order to encourage a mix of apartments and attached and detached dwelling units.

This Plan proposes a total of 2,000 dwelling units on the Crown Farm. The majority of these units would be located near the transit stops and consist of multi-family units.

The balance of the housing would be located on the western portion of the farm. The housing mix suggested for this area is as follows:

Multi-family	40-50%
Attached	40-50%
Detached	10-20%

This Plan strongly encourages the provision of detached housing on the western portion of the Crown Farm, but the actual number that must be provided will be determined at time of subdivision and site plan review.

Small scale retail uses (approximately 50,000 square feet) would be appropriate near the transit stops if developed in concert with the residential uses.

A local park is proposed in the high-density residential area that adjoins the transit way. This approach should provide both residents and employees from nearby employment areas with recreational opportunities.

West of DeCoverly Drive, an elementary school site will provide recreational facilities for residents. Adaptive re-use of the historic England Crown Farm as a

community resource is strongly encouraged to provide another community focal point.

### ***Proposed Development Guidelines:***

The development guidelines are presented in relation to the five neighborhood elements identified as Plan objectives.

#### ***Mix of Uses***

- Although this Plan proposes a residential community on the Crown Farm, the close proximity of over two million square feet of employment uses will allow residents in the area to live within walking distance of employment. To encourage and facilitate pedestrian access between the Crown Farm and adjoining employment, pathways and sidewalks should link the residential development with nearby office parks.
- A retail/higher density residential center, with civic spaces, should be located adjacent to a transit stop.

#### ***Interconnected System of Streets***

- Provide a street network which links the two transit centers.
- Provide a primary road which links residential development west of Discoverly Drive to the transit centers; this road is not intended to function as an alternative to Fields Road or Discoverly Drive but to distribute local traffic movement through the neighborhood.

#### ***Street-Oriented Buildings***

- Locate all retail and higher density residential buildings along street frontage.
- Encourage off-street parking to be located behind buildings.

#### ***Diversity of Housing Types***

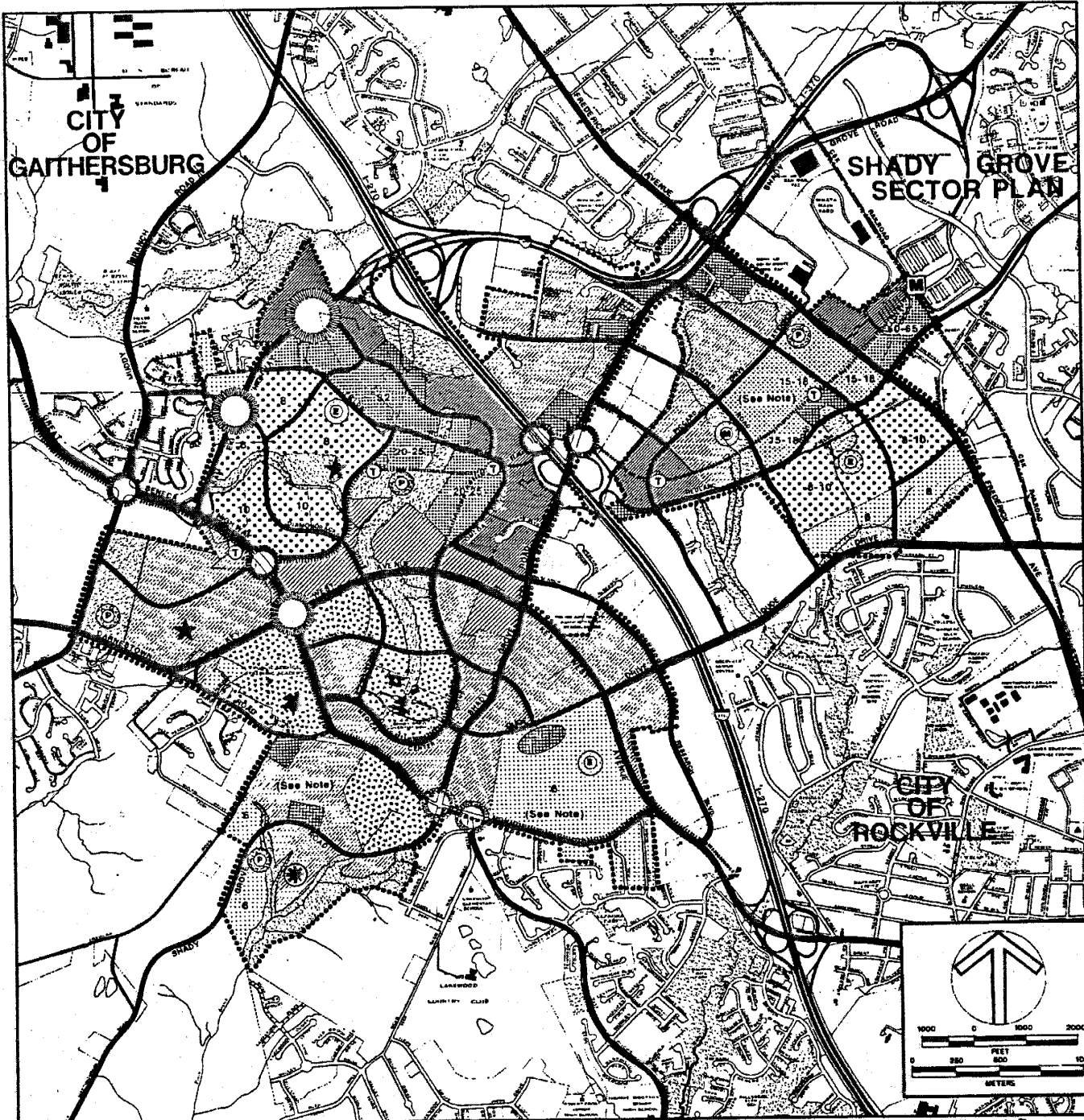
- Locate highest intensity of residential units adjacent to the transit stop and along Discoverly Drive and Fields Road.
- Encourage a mix of units types within each block.

#### ***Mix of Active and Passive Open Space Areas***

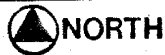
- Provide a large local park between Omega Drive and Discoverly Drive with a path system linking it to the Life Sciences Center and Washingtonian Center.
- Provide civic spaces adjacent to each of the transit stations.
- Integrate neighborhood park facilities (such as tot lots, basketball courts, and tennis courts) throughout residential areas.
- Preserve the large area of trees and the small stream at the southern edge of the property.

# Land Use Plan

Figure 5.1



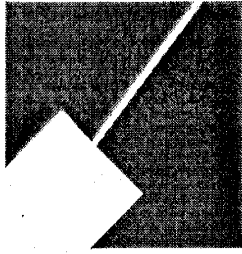
NOTE: This map shows generalized locations of the various uses proposed for the property. The actual land use pattern will be determined in accord with Master Plan development guidelines which address mix of uses, intensity of development, diversity of housing and open space needs



- |   |                                     |                     |                             |
|---|-------------------------------------|---------------------|-----------------------------|
| Residential<br>2-6 Dwelling Units Per Acre        | Employment (R&D)                    | Retail              | School Site                 |
| Residential<br>7-10 Dwelling Units Per Acre       | Employment (Office)<br>Up To .5 FAR | Parkland/Open Space | Elementary                  |
| Residential<br>11-15 Dwelling Units Per Acre      | Employment (Office)<br>Above .5 FAR | Proposed Park       | Middle                      |
| Residential<br>20 or more Dwelling Units Per Acre | Public/Institutional                | Transit Station     | Executive Conference Center |
| Historic Resource                                 | Study Area Boundary                 | Transitway          | Interchange                 |
|   |                                     | Transit Interchange |                             |

MANPCPC

M-NCPPC



MONTGOMERY COUNTY DEPARTMENT OF PARK AND PLANNING

THE MARYLAND-NATIONAL CAPITAL  
PARK AND PLANNING COMMISSION

8787 Georgia Avenue  
Silver Spring, Maryland 20910-3760  
301-495-4500, [www.mncppc.org](http://www.mncppc.org)

March 09, 2006

**Memorandum**

- To:** Callum Murray, Community-Based Planning  
Nancy Sturgeon, Community-Based Planning  
Sue Edwards, Community-Based Planning
- Via:** Karl Moritz, Research & Technology Center, 301-495-1312
- From:** Gary Goodwin, Research Coordinator  
Krishna Akundi, Senior Planner *AK*
- Re:** An evaluation of retail potential at the proposed "Centennial" development  
(also known as Crown Farm)
- Finding:** Staff finds that the proposed site will support between 100,000 and 200,000 square feet of retail: at least a 155,513 sq ft. community shopping type center
- 

***Background***

Community-Based Planning requested Research to evaluate the amount of retail being proposed at Crown Farm: 300,000 square feet. Staff reviewed documentation on the proposed Centennial development; visited the site as well as toured other comparable mixed-use developments. In addition, research staff examined the layout of more traditional shopping centers such as Festival at Muddy Branch, Travilah Square, and Shady Grove shopping center. Staff also reviewed data and analysis provided by *Claritas*.

Based on the proposed layout, comparables and a retail gap analysis, staff estimated the amount of retail space that would most likely be absorbed in the area. We believe that the 50,000 square feet of retail space recommended in the Master Plan is inadequate for Centennial. However, bringing 300,000 square feet of new retail space at this location appears unsupportable. We contend that retail space in the 100,000 to 200,000 square foot range is more realistic. King Farm, for example, supports 143,000sf of retail while Falls Grove supports 215,000sf of retail.

***Comparable Developments***

Staff created a matrix of some prominent mixed-use developments in the region: 12 established and two that have been proposed. Information for these developments was pulled from developer websites and *Business Gazette* news stories.

MIXED USE DEVELOPMENTS							
In Montgomery County, Howard County, Fairfax County, and Prince Georges County							
Development	Community	County	Developer	Acreage	Residential	Retail Space	Office Space
					D.U.	Sq. Ft	Sq. Ft
Konterra Town Center	Laurel	Prince Georges	Forest City Enterprises	488	1,400	300,000	5,675,000
Bowie Town Center	Bowie	Prince Georges	Simon Property Group	87	270	700,000	45,000
Rockville Town Center	Rockville	Montgomery	RD Rockville	15	630	175,000	
Market Square	Rockville	Montgomery	JBG Companies	20	500	131,000	717,000
Washingtonian	Gaithersburg	Montgomery	Peterson Companies	24	84	433,000	1,000,000
Crown Farm	Gaithersburg	Montgomery	KB Homes	183	2,500	300,000	50,000
Fallsgrove	Rockville	Montgomery	Lerner Enterprises	257	1,535	215,558	850,000
Kentlands	Gaithersburg	Montgomery	Alfandre	358	1,975	870,000	84,785
King Farm	Rockville	Montgomery	King Farm Associates	430	3,200	180,000	3,100,000
Emerson	Laurel	Howard	General Growth Properties	570	1,200		
Maple Lawn	Fulton	Howard	Greenbaum & Rose	605	1,116	180,000	1,800,000
Fairfax Corner	Fairfax	Fairfax	Peterson Companies	66	225	296,000	400,000
Pentagon Row	Arlington	Arlington	Federal Realty Investment	18	500	300,000	70,000
Market Common	Clarendon	Arlington	McCaffrey Interest	10	387	220,000	100,000

Source: Developer Websites; Business Gazette

Note: The Residential D.U. count represents the sum of single family residential detached houses, townhouses, condominiums, and rental apartments.

Note: Highlighted developments have recently been proposed

Half of the mixed-use developments that we examined are in Montgomery County— Fallsgrove, Kentlands, King Farm, Washingtonian Center, Market Square and Rockville Town Center. The first four developments are within a 3-mile radius of Centennial. Staff made a visual inspection of the retail at these as well as at more traditional retail shopping centers such as Travilah Square. Travilah Square is among 59 mature commercial centers in the county that might be ripe for redevelopment. The ULI technical assistance panel in its *Improving Mature Commercial Centers* report recommended the Grove and Walnut Hill Shopping Centers—both in the Gaithersburg and Vicinity planning area—as also having redevelopment potential.

Thus, the amount and type of retail at Centennial may be constrained by existing retail facilities. Moreover, we assume that the proposed design and layout for Centennial, the potential size of the residential population and the school would also influence the types of retail tenants that locate at Centennial. We do not visualize, for example, a Home Depot or other big-box as part of the retail mix. Retail at Centennial would be akin to what is commonly found at community shopping centers.

### Types of Shopping Centers

There are six principal types of shopping centers: convenience, neighborhood, community, power, regional and super-regional. These have been defined by the Urban Land Institute and are described at length in the MNCPPC 2005 Shopping Center Directory. The textbook *Real Estate Market Analysis: Tools and Techniques* further describes the Community Shopping Center as a retail center that is usually located near a regional thoroughfare, convenient to two or more neighborhoods, and proximate to entertainment, recreation, personal and financial services. These centers generally range from 100,000 to 500,000 square feet. The average size of community shopping centers in the County is 164,765 square feet.

Three typical community shopping centers that have been built along the County's I-270 corridor since 2000 are the Shops at Germantown Town Center (107,547sf), King Farm Village Center (143,267sf), and the Falls Grove Village Center (215,558sf).

The Kentlands, on the other hand, is one example of a regional shopping center. Regional Shopping Centers typically occupy 500,000sf on average. The Kentlands has over 750,000sf of retail. The Washingtonian Center, which is adjacent to the proposed Centennial development, is also a regional shopping center. What makes Washingtonian Center unique among regional shopping centers, however, is that it is a cross between power centers and a new group known as "lifestyle centers." Lifestyle Centers are designed not just for shopping but for ambience as well. It caters to the upper-income shopper. Lifestyle centers have ample sidewalks, parking adjacent to stores, entertainment facilities, and upscale restaurants and stores. The average lifestyle center is 377,000sf. The Washingtonian Center, which includes four big-box retailers (Target, Kohl's, Dicks Sporting Goods, and Barnes and Noble), occupies 460,000 square feet of retail space—when the Rio Entertainment Complex is included, this regional shopping center boasts nearly 700,000sf of retail.

Clearly, the regional pull of the Washingtonian Center will benefit Centennial. This means that not only would retail at the proposed development serve a captive audience—the 2,500 households—but also consumers who are drawn to the Washingtonian. This factor argued against considering Centennial as simply neighborhood retail. The developer's own space requirement preclude considering a lifestyle or regional type shopping center.

#### Typical Tenants of Community Shopping Centers

Community Centers offer consumers soft-line goods such as apparel and hard-line goods such as hardware and appliances. Grocery stores, quick service restaurants, shoe stores, and women's clothing stores are common tenants. Staff collected information on tenants at Falls Grove, Festival at Muddy Branch, Kentlands, King Farm, Travilah Square, and Washingtonian (see attachments). The table below shows the store types and average square footage for tenants at a Community Shopping Center.

## TYPICAL COMMUNITY SHOPPING CENTER TENANTS

<u>Store Type</u>	<u>S.F.</u>
Auto Parts and Accessories	1,688
Bakeries	4,283
Beer, Wine & Liquor Stores	3,191
Books & Periodicals	14,325
Camera & Photo Studios	2,700
Confectionery & Nut	1,637
Cosmetics & Beauty Salon	1,481
Dry Cleaners	1,533
Electronics	1,360
Financial Institutions	2,721
Fitness & Recreation	2,225
Full Service Restaurants	4,623
Florists	850
Gas Stations	1,304
Gifts & Novelty	5,909
Grocery Stores	49,377
Health & Personal Care	2,386
Home Furnishings	5,584
Household Appliances	11,986
Men's Clothing	3,772
Office Supplies	1,083
Optical Goods	1,405
Quick Service Restaurants	2,237
Pet and Pet Supplies	2,640
Pharmacy	12,000
Sewing	1,053
Shoe	2,771
Sporting Goods	6,655
Video, CD, Music Stores	2,734

Source: Crittenden's Retail Newsletter; Dollars and Cents, Real Estate Developers; MNCPPC

Assuming one retailer from each store type and no big-box retail or home center, we could reasonably expect a 155,513 square foot community-type shopping center at the proposed Centennial.

### ***Retail Gap Analysis***

Research and Technology Center staff usually calibrates an in-house retail analysis model to estimate the retail needs of local markets. Due to time limitations, staff requested *Claritas* the nationally recognized marketing firm to provide a retail opportunity gap analysis.

The gap analysis compares consumer-spending patterns at retail stores and sales of retail stores in a defined consumer market. The difference between spending and sales reveal either a surplus or an opportunity gap for specific goods in that market. Within a one-mile radius of the proposed Centennial development, there is an opportunity gap—a demand for more retail. However, when the market area is expanded to a three-mile radius, there is a surplus of retail activity—in other words, existing retailers meet consumer demands.

*Claritas* measured retail demand within a one-mile and three-mile radius of Centennial—more precisely from the Sam Eig and Fields Road intersection. The character of the retail market is determined by the demographics of the area—particularly by the number of consumers and median incomes.

	Population	Median Age	Median Income	Retail Gap / (Surplus)
1.0 Mile Radius	17,745	34	\$73,408	\$21,303,096
3.0 Mile Radius	119,476	36	\$80,886	(\$883,421,706)

Source: Claritas 2005 Site Reports

The question to answer then is what retail opportunities are not available to the area's young upwardly mobile population that the Centennial development might satisfy. The gap analysis shows that the existing inventory of stores does not fulfill the needs of consumers in the primary (1-mile radius) and secondary (3-mile radius) markets for more goods and services. There is sufficient consumer demand for the entry of new stores.

#### CONSUMER DEMAND FOR RETAIL GOODS IN SUBJECT AREA

Retail Stores	Primary Market	Secondary Market	Total Unmet Demand
Grocery Stores	\$24,184,746	\$16,131,684	\$40,316,430
Gasoline Stations	\$15,386,702	\$61,786,149	\$77,172,851
Auto Parts & Tire Stores	\$6,196,640	\$8,948,584	\$15,145,224
Electronics Stores	\$3,848,706	\$0	\$3,848,706
Family Clothing Store	\$3,785,640	\$0	\$3,785,640
Speciality Food Stores	\$3,140,461	\$18,177,705	\$21,318,166
Home Furnishing Stores	\$2,662,139	\$0	\$2,662,139
Jewelry Stores	\$2,557,887	\$0	\$2,557,887
Shoe Stores	\$1,944,030	\$0	\$1,944,030
Office Supply Stores	\$1,460,388	\$0	\$1,460,388
Men's Clothing Stores	\$1,147,828	\$0	\$1,147,828
Optical Goods Stores	\$860,763	\$0	\$860,763
Household Appliances	\$0	\$1,919,358	\$1,919,358
Clothing Accessories	\$0	\$1,660,536	\$1,660,536
Drug Stores	\$0	\$33,184,294	\$33,184,294
Record Stores	\$0	\$1,286,645	\$1,286,645
Florists	\$0	\$2,500,565	\$2,500,565
Gift Shops	\$0	\$1,136,659	\$1,136,659

New retail entrants into this market could capture up to \$67.2 million in the primary market and up to \$146.0 million dollars from consumers in the secondary market. There is strong demand—as measured in unmet sales—for grocery stores and drug stores.

#### **Conclusion**

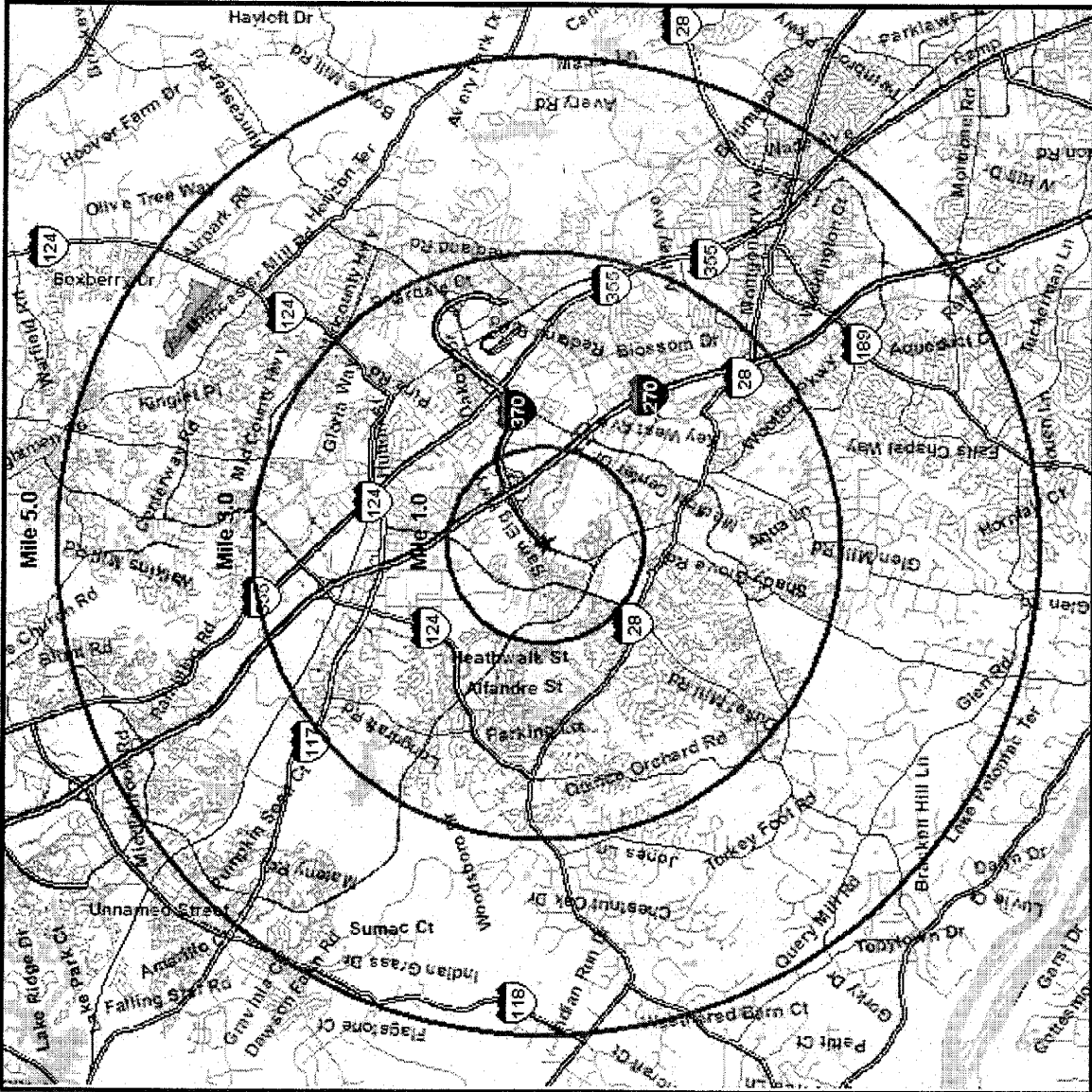
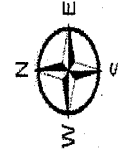
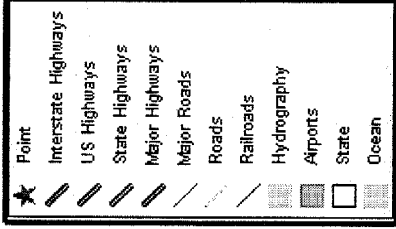
Based on the gap analysis and tenant survey, staff finds that the best fit for retail in this area is a 151,513 square foot community shopping center.



# Area Map

Order #: 963947363  
Site: 01

SAM EIG HWY AT FIELDS RD  
GAITHERSBURG, MD 20877  
Coord: 39.116150, -77.208350  
Radius - See Appendix for Details



Prepared For: Crown Farm  
Project Code:



## RMP Opportunity Gap - Retail Stores

Prepared For:  
Project Code: Crown Farm

Order #: 963947363  
Site: 01

### SAM EIG HWY AT FIELDS RD, GAITHERSBURG, MD 20877, 0.00 - 1.00 Miles, Total

Retail Stores	Demand (Consumer Expenditures)	Supply (Retail Sales)	Opportunity Gap/Surplus
Total Retail Sales Incl Eating and Drinking Places	296,665,661	275,362,565	21,303,096
Motor Vehicle and Parts Dealers-441	59,924,972	14,127,789	45,797,183
Automotive Dealers-4411	49,546,209	13,914,052	35,632,157
Other Motor Vehicle Dealers-4412	3,968,386	0	3,968,386
Automotive Parts/Accsrs, Tire Stores-4413	6,410,377	213,737	6,196,640
Furniture and Home Furnishings Stores-442	8,624,987	2,493,271	6,131,716
Furniture Stores-4421	5,137,228	1,667,651	3,469,577
Home Furnishing Stores-4422	3,487,759	825,620	2,662,139
Electronics and Appliance Stores-443	8,117,091	13,739,159	(5,622,068)
Appliances, TVs, Electronics Stores-44311	5,020,712	1,172,006	3,848,706
Household Appliances Stores-443111	794,430	91,068	703,362
Radio, Television, Electronics Stores-443112	4,226,282	1,080,937	3,145,345
Computer and Software Stores-44312	2,815,864	12,567,153	(9,751,289)
Camera and Photographic Equipment Stores-44313	280,515	0	280,515
Building Material, Garden Equip Stores -444	26,422,753	3,569,005	22,853,748
Building Material and Supply Dealers-4441	23,478,557	3,000,404	20,478,153
Home Centers-44411	9,578,508	0	9,578,508
Paint and Wallpaper Stores-44412	399,907	0	399,907
Hardware Stores-44413	1,734,808	0	1,734,808
Other Building Materials Dealers-44419	11,765,335	3,000,404	8,764,931
Building Materials, Lumberyards-444191	4,126,059	1,023,171	3,102,888
Lawn, Garden Equipment, Supplies Stores-4442	2,944,196	568,601	2,375,595
Outdoor Power Equipment Stores-44421	405,563	531,210	(125,647)
Nursery and Garden Centers-44422	2,538,633	37,391	2,501,242
Food and Beverage Stores-445	33,329,980	7,825,228	25,504,752
Grocery Stores-4451	27,593,570	3,408,824	24,184,746
Supermarkets, Grocery (Ex Conv) Stores-44511	26,372,997	2,392,903	23,980,094
Convenience Stores-44512	1,220,573	1,015,921	204,652
Specialty Food Stores-4452	3,944,102	803,641	3,140,461
Beer, Wine and Liquor Stores-4453	1,792,309	3,612,762	(1,820,453)
Health and Personal Care Stores-446	14,391,813	16,477,902	(2,086,089)
Pharmancies and Drug Stores-44611	11,781,702	12,339,968	(558,266)
Cosmetics, Beauty Supplies, Perfume Stores-44612	582,025	3,054,580	(2,472,555)
Optical Goods Stores-44613	985,541	124,778	860,763
Other Health and Personal Care Stores-44619	1,042,545	958,575	83,970



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Gasoline Stations-447	24,306,101	8,565,028	15,741,073
Gasoline Stations With Conv Stores-44711	15,386,702	0	15,386,702
Other Gasoline Stations-44719	8,919,399	8,565,028	354,371
Clothing and Clothing Accessories Stores-448	16,537,511	5,251,038	11,286,473
Clothing Stores-4481	11,528,511	4,965,805	6,562,706
Men's Clothing Stores-44811	1,220,310	72,482	1,147,828
Women's Clothing Stores-44812	3,518,962	3,326,675	192,287
Childrens, Infants Clothing Stores-44813	492,795	102,246	390,549
Family Clothing Stores-44814	5,114,497	1,328,857	3,785,640
Clothing Accessories Stores-44815	306,542	33,055	273,487
Other Clothing Stores-44819	875,404	102,490	772,914
Shoe Stores-4482	2,229,262	285,232	1,944,030
Jewelry, Luggage, Leather Goods Stores-4483	2,779,739	0	2,779,739
Jewelry Stores-44831	2,577,887	0	2,577,887
Luggage and Leather Goods Stores-44832	201,852	0	201,852
Sporting Goods, Hobby, Book, Music Stores-451	6,447,192	11,881,067	(5,433,875)
Sporting Goods, Hobby, Musical Inst Stores-4511	4,337,296	4,481,549	(144,253)
Sporting Goods Stores-45111	2,159,973	2,521,437	(361,464)
Hobby, Toys and Games Stores-45112	1,435,476	1,893,657	(458,181)
Sew/Needlework/Piece Goods Stores-45113	362,355	66,454	295,901
Musical Instrument and Supplies Stores-45114	379,491	0	379,491
Book, Periodical and Music Stores-4512	2,109,897	7,399,518	(5,289,621)
Book Stores and News Dealers-45121	1,405,456	7,399,518	(5,994,062)
Book Stores-451211	1,325,426	7,399,518	(6,074,092)
News Dealers and Newsstands-451212	80,030	0	80,030
Prerecorded Tapes, CDs, Record Stores-45122	704,441	0	704,441
General Merchandise Stores-452	39,296,407	146,550,647	(107,254,240)
Department Stores Excl Leased Depts-4521	27,237,525	139,213,044	(111,975,519)
Other General Merchandise Stores-4529	12,058,882	7,337,602	4,721,280
Warehouse Clubs and Super Stores-45291	7,479,755	7,170,613	309,142
All Other General Merchandise Stores-45299	4,579,126	166,989	4,412,137
Miscellaneous Store Retailers-453	8,267,897	3,950,292	4,317,605
Florists-4531	984,358	106,052	878,306
Office Supplies, Stationery, Gift Stores-4532	3,667,713	1,616,714	2,050,999
Office Supplies and Stationery Stores-45321	1,613,835	153,447	1,460,388
Gift, Novelty and Souvenir Stores-45322	2,053,878	1,463,267	590,611
Used Merchandise Stores-4533	906,644	112,180	794,464
Other Miscellaneous Store Retailers-4539	2,709,183	2,115,346	593,837



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Non-Store Retailers-454	17,715,493	2,524,579	15,190,914
Electronic Shopping, Mail-Order Houses-4541	11,559,815	0	11,559,815
Vending Machine Operators-4542	1,383,276	1,744,346	(361,070)
Direct Selling Establishments-4543	4,772,401	780,233	3,992,168
Foodservice and Drinking Places-722	33,283,463	38,407,561	(5,124,098)
Full-Service Restaurants-7221	13,733,956	19,977,728	(6,243,772)
Limited-Service Eating Places-7222	14,235,382	16,378,367	(2,142,985)
Special Foodservices-7223	2,522,100	2,051,466	470,634
Drinking Places -Alcoholic Beverages-7224	2,792,026	0	2,792,026
GAFO *	82,690,901	181,531,895	(98,840,994)
General Merchandise Stores-452	39,296,407	146,550,647	(107,254,240)
Clothing and Clothing Accessories Stores-448	16,537,511	5,251,038	11,286,473
Furniture and Home Furnishings Stores-442	8,624,987	2,493,271	6,131,716
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