# Department of Housing and Community Affairs

## Montgomery County, Maryland

## *Burtonsville Consumer Shopping Survey And Market Study*

### *Final Report*

October 2007

Conducted By:

POTOMAC
INCORPORATED
Powerful Insights

# Department of Housing and Community Affairs
# Montgomery County, Maryland

# *Burtonsville Consumer Shopping Survey and Market Study*

## *Final Report*

October 2007

*Table of Contents*

## Introduction
Potomac Incorporated is pleased to submit this final report – ***Burtonsville Market Study and Consumer Shopping Survey.***

We have performed this overall market study, including extension market research and analysis, as a crucial part of the preliminary planning stage for the Montgomery County Department of Housing and Community Affairs (DHCA) and cooperating agency, the Department of Economic Development (DED).

Our combined market study consisted of three principal elements:

- Comprehensive, one-on-one interviews with Burtonsville-area community and business leaders for the purpose of eliciting feedback and recommendations;

- A neighborhood shopping survey with 500 residents living within one to three miles of the Burtonsville commercial core; and

- An examination of retail conditions, trends, market demand, prime and secondary trade areas with pertinent demographics and important retail/public service needs specified for the next planning stage.

For the development and evaluation of the retail market analysis, Potomac utilized the expertise of Thomas Point Associates and its principal, Mr. Thomas Flynn. Thomas Point Associates brings extensive background in planning, feasibility analysis, development and redevelopment for governments at all levels and has worked extensively in Montgomery County on important public/private projects.

We also utilized the experience of Mr. Jim Giegerich as Potomac's economic development and retail market consultant. Mr. Giegerich was formerly Economic Development Director for Montgomery County, and has conducted several hundred retail market studies in his capacity as principal for Giegerich and Associates. Mr. Giegerich reviewed all aspects of this overall market study and offered strategies and recommendations important for the public service in revitalizing the Burtonsville commercial core.

This Final Report offers a perspective on our formative research, most especially highlighting key conclusions and recommendations.

First, we carried out detailed interviews with select community and business members as a critical basis for uncovering insightful recommendations about possible changes and improvements to the commercial core.

As a perceptual backdrop, we then conducted a telephone survey (Section 4) among Burtonsville area residents, all living within the eastern part of Montgomery County. Using scientific methods, we attempted to uncover the specifics habits and behavior from 500 nearby shoppers and determine their community retail needs looking forward.

Both the qualitative and quantitative results, along with pertinent background materials, were provided to our retail market expert, Tom Flynn, Thomas Point Associates, Inc., as key references in the development of the market study.

We purposely ensured that this formative research was tempered and put in a more appropriate and actionable context by the latest market data and a realistic market assessment.

For example, the telephone survey revealed the preference of some respondents for more extensive retail and certain department stores not presently found in the Burtonsville area but clearly desired. These respondents were not presented with the suppositional information that creating a larger community or regional shopping center with its more expansive retail options and major stores would almost certainly increase traffic and worsen congestion, beyond a community acceptable level.

For the purpose of critical review, we ask the reader to place greater weight in the highlighted conclusions and recommendations in the research market. Among its findings: area residents will be presented with ample regional shopping opportunities within a reasonable time distance from Burtonsville, in the not-too-distant-future.

We greatly appreciate all the cooperation provided by members of the Department of Housing and Community Affairs and leaders from the Burtonsville community.

We are confident in this market research process that our team has identified the underlying market challenges and recommended retail and service opportunities for revitalizing the Burtonsville commercial sector and surrounding neighborhoods, both in the short term and over a longer time horizon.

## Executive Summary

The Burtonsville community, including business and property owners as well as a large number of consumers, suggested several things they would like to see in the area:

- A community gathering place
- Beautification of the commercial area through improved streetscape and facades
- Environmental protection, including better storm water management and recycling
- Streamlined development process and County incentives
- Enhanced parking possibilities to support new and current retail
- Retention of the Amish Market
- Parks/playgrounds
- Culture/the arts
- Attractive entryway and promotional signage
- Burtonsville website
- Burtonsville branding campaign

Burtonsville is a good location in a strong but rapidly changing market area. Large developments on the horizon will bring changes to the commercial environment. The leading problems associated with the commercial environment in Burtonsville are a lack of space and a wave of competition.

- The constraints on bringing in new retail development are apparent. There is limited development capacity due to constraints on land, circulation, zoning, storm water management and public opposition.

- The redesign of Route 29 capped Burtonsville's commercial growth and suggests greater potential for specialized/destination retail combined with neighborhood shopping. Burtonsville can accommodate restaurants and specialty stores including salons, gift shops and services that do not require a mall location.

The pressures for improvements to Route 198 are strong and increasing as traffic on 198 in Burtonsville and Spencerville has grown significantly. The County's proposed ring road north of the commercial strip on Route 198 and the proposed InterCounty Connector ("ICC") could have a significant impact on this situation but the relationship is uncertain.

The use of the term "Town Center" has been a confusing piece in the public discussions in Burtonsville. Some have been talking about a retail place while others are discussing a public or cultural center. Residents interviewed in the consumer phone survey express their "need for more and better stores." The responses of business leaders (March 7, 2007) reflect confusion on this point. It is important that someone explains the concept of the Town Center and develops consensus on what the term means and in what ways it could apply. This would lead to a discussion of what is possible in Burtonsville given constraints on land and public investment.

- The "retail" Town Center concept (in the style of Bowie, for example) is not viable. It would have required an area planning approach with coordination between redevelopment of Burtonsville

Shopping Center and commercial areas to the west, new patterns of circulation (streets, sidewalks, bikeways) and a district parking approach possibly including a parking structure.

- There is still the potential to have a public place/town center (with some of the components of a Reston-style town center, aside from the density):
    - Improvements in landscaping, circulation, pedestrian safety.
    - Location of community facilities.
    - Meeting and/or performance space.

- A smart recommendation is to classify this area, for future planning and redevelopment, as its own distinctive "retail village," and avoid broader and unrealistic terms as a Town Center. A retail village concept fits comfortably with the community planning notion of shopping that is convenient for nearby neighborhoods and perpetuates Burtonsville as the principal and historic place at an accessible crossroads designation. At the same time, the Burtonsville community will benefit from the expanding regional shopping opportunities within a reasonable distance. These regional shopping centers may be a traffic magnet requiring altered and/or increased traffic handling considerations at levels higher than could be accommodated on Burtonsville's local roads.

The following are some specific ideas that the County can use although most work best when there is agreement on a central concept for the area:

- Shared parking: where there is market demand, nothing supports retail development and enhancement better than parking.
- Development of a central public space: Place-making is essential to foster the unique identity of Burtonsville surrounded by established, emerging and larger mixed-use projects, such as Konterra, Laurel, Maple Lawn, Columbia, and Orchard Center.
- Streetscaping.
- Landscaping
- Storm water drainage improvements.
- Pedestrian and bikeway improvements.
- Signage – including directional and promotional.
- Design assistance and coordination.
- Financial support for targeted businesses to stay and grow.

It is clear that the ring road with its limited street parking will not, in itself, divert shoppers and residents from driving on Route 198 nor is it a phase in a larger program that will "allow Burtonsville to transition into a town center." However, plans for the ring road seem to be moving forward. There is a need to evaluate the impact and cost-benefit of this road and to better integrate its design in terms of parking and place-making while considering alternatives.

There is still room for limited retail expansion in Burtonsville. The challenge will be to get more from less in terms of tenants that pay higher rents, goods and services that the community wants and stores that make the area stand out in a market area with a growing variety of competitive locations. In this situation the "retail village" may be a better model than the "town center."

## Summary of Interviews with Select Business Members

One-on-one phone interviews were conducted with nine Burtonsville business leaders on February 22–26, 2007. These included small business owners; property owners; and a developer, leasing agent, and attorney for the principal shopping centers at the MD 198 and US 29 crossroads. Overall, respondents participated earnestly and were eager to express their opinions about the current conditions and future fate of the Burtonsville business community. As one business owner remarked, "I feel better getting this off my chest."

Interviewees responded to the following:

- How long in the Burtonsville community and at current location
- Why attracted to Burtonsville
- Perceptions of retail/commercial mix today and in 5-10 years
- Impact of road realignments – present and future
- Visions for a "Town Center"
- Benefits for the business community
- Obstacles for the business community
- Business marketing strategies
- Competition to Burtonsville

During the interviews, business leaders expressed the need for Montgomery County to be a catalyst for revitalization.

*How long*

Participants have been in business in Burtonsville from 2 years to 67 years.

Participants described strong ties to the community. Most live in or near Burtonsville or close by in Fairland, Laurel and Howard County.

*Why attracted*

Reasons mentioned include:

- availability of suitable stores
- affordability
- land ownership
- desirable location within the Washington MSA
- growing area
- "good junction and place to do business"
- "warm community"
- "my family lived here on a dairy farm"
- "bring something special" in retail and shopping centers to an "underserved community"

*Current retail/commercial mix perceptions*

Business owners and representatives affiliated with Burtonsville Crossing see their center as "one of the stronger draws." The Giant is an anchor that meets everyday consumer needs.

A property owner along 198 and a major business owner [Zimmerman's Home Center] agreed that the current mix is "fine" and draws people to their centers.

Several stores or restaurants regard themselves as "destinations" in contrast with Burtonsville itself, which is not viewed as a destination for shopping. These are Seibel's, Jerry's Pizza and Sub Shop, Rita's Italian Ice, and Zimmerman's.

Rita's pointed out that its customers come from the nearby housing developments and are not drawn by the other businesses. People mainly come after dinner with their families. Rita's closes for the season in early October after children return to school, and reopens in March. Seibel's also reported community support for the restaurant (on its site since 1939); and also mentioned that car repair (at breakfast), nearby offices (at lunch) and the Farmers Market (on Friday and Saturday) can be draws. The property owner with ethnic restaurants as tenants – Chinese, Mexican, Cuban, Afghan, and El Salvadoran – says they draw "a lot of people from the community."

Those affiliated with the Burtonsville Shopping Center are emphatic about local shopping inadequacies: "It's a terrible mix" and they warn that staying the same can be the worst scenario. "That's what is pushing the business community to try and revitalize itself." The developer observes the current retail to be old and obsolete. Overall, Burtonsville is "sorely lacking in upscale amenities." The retail doesn't meet modern formats, design, tenant mixes, and standards when compared to the west side of Montgomery County, such as the Washingtonian [Rio] and Bethesda Avenue in downtown Bethesda. "These sorts of properties are much more walkable, and feature new urbanism and town center designs." It's what the developer says he was aiming to bring to Burtonsville [but says he was "shot down" in the process.]

*Envisioning Burtonsville retail/commercial district in 5 to 10 years*

Business leaders summarize the options as "no change," "further decline," "more competition," or "potential revitalization" that will be positive eventually but could take its toll on the current business owners during the construction process especially as access and parking are limited. Business leaders seem more able to describe what they don't want for Burtonsville than to articulate a clear vision for the future.

Two established businesses see ***no change***. Says one owner: "I don't anticipate seeing any change. I've been fighting this for far too long. It doesn't change."

Similarly, the developer of Burtonsville Shopping Center says that the current rate of change and the current vision are not dramatically different; he expects Burtonsville to be virtually the same in five years. "We will do a grocery-anchored, state-of-the-art shopping center, and it will be nice for a stand-alone project. The problem for the larger Burtonsville area [is that] it won't provide a catalyst to transform the rest of the business district. And so the eyesore along Route 198 will remain."

A tenant in Burtonsville Crossing believes it will "get rougher before it gets better because it's going to take too long to do anything positive." Even if the ultimate goal is to help Burtonsville, he fears that the business community will suffer because "no thought will be given to our survival during revitalization."

Some business owners are as concerned about the advent of big-box stores as are some residents who were interviewed. This area is not for a Wal-Mart or Target or Costco, they say. "That's just yuck." "We don't want Burtonsville to look like Route 1 – Don't turn Burtonsville into Laurel with gigantic stores or like Rockville Pike or Route 40 or MD 198 between the Baltimore-Washington Parkway and Route 1."

Instead, one business owner sees "a town center with a Whole Foods and all kinds of different shops – more variety, not just one store." Another property owner favors a village-like setting for the town center featuring residential and retail mixed use, including high-end apartments and condos.

Burtonsville Crossing and Briggs Chaney are described as looking fine for this community. Cleaning up the strip centers along MD 198 is viewed as a big challenge.

Others see more competition for Burtonsville in the future as well as more opportunities for other developments. Konterra to the east as well as a new project [West Farm] with expanding housing, retail, restaurants and a hotel to the west were referenced.

*Impact of road realignments – present and future*

Regarding the realignment of US 29 – clearly, Burtonsville Crossing tenants no longer benefit from north/south drive-by traffic and report sales are down. One tenant says his business has been drastically affected. “The amount of cars driving in front of my store every day has been reduced about 90%. There is much less visibility, much less impulse to stop and shop.”

The Burtonsville Shopping Center has been hurt, says its spokesman, but not as much as Burtonsville Crossing. Even so, tenant sales are down at the Burtonsville Shopping Center, and the bank vacated to Howard County.

While the construction phase hurt Zimmerman’s, the store’s spokesman notes a positive: “The intersection is cleaned up and the traffic is not here, so that attracts people to the area.” It’s easier to get here from the east, north, and west, and that’s good.” Yet, it’s more difficult for cars to come here from the south and that has curtailed “a fair amount” of business from Silver Spring. It’s a mixed bag.

A “destination” business, such as Seibel’s, says it has not been affected by the US 29 realignment. Property owner and businesses on the north side of 198 say they are not impacted by the US 29 alignment. Jerry’s Subs and Pizza owner says it’s a little easier for his customers to get entry and egress. “The traffic doesn’t back up like it used to. People didn’t stop because of the traffic. I don’t need traffic. I need people to come into the place.” Another business said that it hasn’t lost any sales during the past two years, but hasn’t gained any sales either, and would like his customer base to grow.

Regarding impact of construction along MD 198 – owners express deep concern about lessened visibility of their stores, limiting access to get in and out of businesses, reducing parking, and inability for tractor trailer trucks to make deliveries without making a U-turn at Old Columbia Pike.

Reducing visibility and access will “kiss Burtonsville goodbye and make it a graveyard,” said a property owner. “It will kill us…it will bring even less traffic to the area. The faster the cars go, the less they see of my store,” says a Burtonsville Crossing tenant. Observes another business owner, a divider on MD 198 will “truncate the businesses on the south side” and isolate them from the north side.

Lack of parking cited:

- Parking is already at a premium for small businesses, such as Jerry’s Subs and Pizzas, also Rita’s Italian Ice.
- Widening of MD 198 will be “detrimental,” they say, unless “something is done about parking.” “Losing parking spaces will put me out of business” says one owner.
- “Parking is the constraint on development. It affects the types of businesses that are attracted.”
- “To be more upscale, shops and restaurants require more parking.”

Ideas for access and parking improvements mentioned:

- Incorporate center lane along MD 198 to make left and right turns.

- Assign business or property credit for parking calculations for how many spaces would be lost. "If they are going to net out spaces, that business/property should be given credit."

- "Build a parking garage beyond the ring road."

- Combine single entry/exit for Jerry's Subs and Pizzas and Tony's Garage; already suggested by these business owners to the State Highway Administration.

- Utilize land on south side of MD 198 for widening road. (Westland Printer bank of land referenced.)

- Install a traffic signal between the two existing lights along MD 198 west of US 29. There is too big a gap between the existing lights. Another light will create a break in the traffic.

- Adjust the timing of traffic lights to allow safe entry and egress in strip centers.

- Slow down the traffic on MD 198.

<u>Regarding the proposed "ring road"</u> behind the proposed Town Center, this access road has drawn a mixture of responses from business and community leaders:

- Will help develop the feel of a town center.

- Should be a complete circle on both the north and south sides of MD 198, linking Burtonsville Elementary School and the Burtonsville Shopping Center.

- Will be a detriment to the school because it will increase traffic, and drivers do not obey speed limits. [From the school principal]

- Will be a cut-through to avoid the shopping district and connect faster with MD 198 and US 29.

- A "colossal waste of money" because it takes people to the back door of the business. People don't want to enter from the back. Feels safer, more secure to enter from front.

In sum - MD 198 construction in conjunction with town center renovation is generally seen as the right direction if this combination:

- Brings more people and customers

- Beautifies, revitalizes, and integrates the existing business centers
- Provides adequate and safe access to store fronts
- Permits visibility of stores
- Allows ample parking
- Adjusts traffic light timing along US 29 and MD 198 to allow for safer entry and egress
- Includes safe, walkable sidewalks for pedestrians and lanes for bicyclists
- Lowers traffic speed
- Does not impact negatively on current businesses

*Visions for a Town Center*

Once a farming community, then a country crossroads and now a suburban community some see as a "drive-through," Burtonsville has the potential to be a village. Business owners offer concrete suggestions, but simultaneously urge the County to play a prominent role to give a leg up to existing businesses and allow Burtonsville to develop into a thriving community before it is dwarfed or overtaken by encroaching projects in surrounding Prince George's and Howard counties. The time is now, they say.

The Burtonsville Shopping Center developer urges that the Master Plan process be reopened to benefit the small businesses particularly along MD 198. Otherwise, he says, the Master Plan cannot achieve its goals. For example, "you can put in sidewalks, but that doesn't make it walkable. A block ideally is 400 feet long. Pace off the blocks in places such as Bethesda Avenue, Paris, Washington, DC – they are 400 feet long. Presently planned is a 'super block' that is 1,200 to 1,500 feet from shopping center to school, corner to corner. People will not walk on streets that are so long. People walk to go somewhere or to be somewhere. Burtonsville is not a destination. You cannot walk to it – cannot cross MD 198 or US 29 – without taking your life in your hands. People need to come and park, and then walk around."

Also needed are two cross streets to give more frontage – "like a village" to build on. "Think of Old Philly, Old Boston. Put shops and restaurants in a city block pattern and extend through the business district like Bowie Town Center" or a smaller version of downtown Silver Spring.

Burtonsville lacks big office complexes, Metro station, or dense housing such as found in and around downtown Silver Spring and Bethesda. The Burtonsville Town Center will be dependent upon its retail as its anchor.

Once again, access and visibility are mentioned as key elements to the Town Center. A property owner along MD 198 is particularly opposed to trees that would obstruct the businesses and sidewalks and a bicycle path that would take away land from parking. "You design the Champs-Elysees, but you can't reach it and it's not visible," he says. The main boulevard concept must give access to the businesses.

Main Street is generally perceived to be on MD 198 between Old Columbia Pike and Route 29. "That's traditionally what you think as Burtonsville, but I can't imagine how they will get that feeling," says a Burtonsville Crossing tenant. Says another owner, the potential is there along MD 198 in Burtonsville, with improvements.

More synergy needs to occur between the Burtonsville Shopping Center and the retail stores located along MD 198. The smaller businesses will need to redevelop to better use the roadways. If that occurs, people can go places to shop and eat at restaurants and outside cafes – "That's what makes a town center."

Burtonsville Shopping Center developer says he is asking for seven-tenths of an acre to be rezoned from rural cluster to C2 to square off his project and "do the development that I need it to be."

As much as Seibel's would like to see a town center emerge, the owner believes that it won't occur on MD 198 – a state highway. An alternative vision is to create a big park like Wheaton Regional Park along the back side of the loop (access or ring) road – "a big park where people can socialize, eat, and enjoy."

Viewed as Town Center models or ideas suitable for Burtonsville:

- White Marsh Town Center – "Gorgeous, populated, and heavily used by the local community, but more like boulevard shops with restaurants, pubs, small shops, movie theaters, and not the big-box stores. Income-wise and density-wise, it's just north of Baltimore, and we are just south of Baltimore" – Zimmerman's

- Clarendon Center, Virginia

- Vienna Center, Virginia

- Smaller version of downtown Silver Spring, along Ellsworth Street

- Bowie Town Center

- "As many stores as possible" with maximum access between the entire retail district. "Get it [development] over with."

- Using the name "Burtonsville" wherever possible to reinforce community identity. Business owner notes that the "Fairland Rec Center" on Old Columbia Pike ought to carry the name

"Burtonsville Rec Center."

- Huge park
- Movie theaters – Columbia is 11 miles, Laurel is 10 miles; Calverton and Silver Spring are next closest
- Groupings of restaurants

*Other wishes for benefiting the community*

- Make Burtonsville a town that people want to come to.
- Connect the Town Center with surrounding neighborhoods.
- Find a way to make two state highways MD 198 and Old Columbia Pike pedestrian and bike friendly.
- Put up a footbridge on Blackburn Road; unsafe to cross at the street light.
- Do more streetscaping.
- Overcome fear of change.

*Critical role for Montgomery County and Maryland*

The business community calls on Montgomery County and the state to play critical roles in Burtonsville's revitalization. There is an expressed fear that neither the county, state or government agencies pay attention to each other – particularly in realigning roads. The SHA is "completely insensitive to the economics of businesses and the community, says one property owner – they have only "engineering eyes."

The County thinks of Burtonsville as a "stand alone" community – instead of holistically. "Burtonsville will stay the same until someone at the County level does something about it. But Burtonsville doesn't seem to be on the County Council or County Executive agenda," says a prominent developer.

The Department of Housing and Community Affairs is asked to help the smaller properties along MD 198 get through the subdivision process in order to redevelop and comply with setbacks from property lines, footprint, environmental impact, parking allowances, and landscaping, for examples. Some of these properties lack recorded plats, which are required for building permits. The County government needs to step in and help these businesses resuscitate; they are not heading in an upscale direction; yet Burtonsville is demographically affluent.

The business community looks to government support for the following:

- Foster redevelopment of the business community as much as possible.
- Streamline the development process –Particularly shorten and simplify the preliminary plan development process; otherwise length of time (up to three years) and costs (many thousands of dollars and higher) are prohibitive, and business owners are discouraged from making positive changes.
- Enable and encourage incentives at County level and by Park and Planning – including green tape incentives; making incentives less cost prohibitive.
- Provide the tools for the businesses and property owners to turn their buildings around and adapt to changing geometry.
- Provide financial compensation or assistance for negative impact during construction.
- Compensate landlords to reduce tenants' rent during construction.
- Modify entrances and exits so that businesses are not cut off. "We can't take the next shovelful of dirt in our faces."
- Install better street lighting on MD 198.
- Amend County code to allow Burtonsville Crossing signage in the back of the shopping center, which faces both US 29 and a park and ride lot.
- Improve the flood plain between Tony's and McDonald's.
- Enforce ordinances; stress beautification in commercial zones too.
- More planning; less topsy-turvy development.

*Marketing Strategies*

It does not appear that the business community has pulled together to pool resources and devise a comprehensive marketing strategy for Burtonsville. The Burtonsville Shopping Center developers will do marketing in sync with redevelopment of that property. A spokesperson for Burtonsville Crossing says it has not changed its marketing strategy to capture new customers, but does not speak for the tenants. "We don't get involved with their marketing." Property owner along MD 198 says the marketing strategy hasn't changed. His stores serve mostly people within one to three miles; and some within a five-mile radius.

Business owners try hard to penetrate and strengthen relationships with the community. For example, Jerry's Subs and Pizza holds "School Nights," with 10 percent of sales going to the schools; they sponsor baseball, football, and soccer teams at Burtonsville and Beltsville elementary schools and

Paint Branch and Adventist Schools. “We are pretty embedded in the community.” Seibel’s agrees that restaurants need to be “very active in the community. Get your face out there. We are all fighting for our market share. You need to do more than ‘really good food.’” Personal interaction makes the difference. Seibel’s points to its frequent dining program and its newsletter mailing to 5,000 customers about five times a year, which is a way to market to the existing base. To reach new home buyers, Seibel’s buys address lists and mails three or four newsletters, then sends a “welcome to the community” postcard, which provides $20 off for the first visit. “We want people to be intrigued.” There needs to be interactivity for coupons; we just don’t do them, says the owner, who was born and raised in Burtonsville, attended Burtonsville Elementary School and was pregnant with her son, now 14, when the Town Center concept appeared in the Fairland Master Plan. Seibel’s regularly sponsors a canned food drive to benefit the Montgomery County food bank or local churches. As a reward, “we give 10 percent off” the meal. Rita’s Italian Ice Works advertises in “*The Best of Burtonsville”* and “*The Best of Laurel*” about every two months during their season. The tried *Clipper Magazine*, but only redeemed about 25 coupons from 50,000 homes, which are mainly located toward Silver Spring – served by another Rita’s Italian Ice.

Zimmerman’s also advertises with flyers and newspaper inserts; most customers are repeats. “Our philosophy is to give great service to the customers and get them in and out quickly with what they want.”

About marketing, one store owner in Burtonsville Crossing said, “When business is limited, a lot less funds are available. Small businesses get along by the skin in our teeth…It’s hard.” Newspaper advertising has gotten “zero response,” so the hobby shop does “more personal advertising to clubs and is trying to expand an Internet presence. An Internet store can be more solvent than a brick and mortar store, says the owner. One reason: no rent overhead.

*Competition*

Seen as key competitors to Burtonsville:

- The huge Konterra development being planned between I-95 and MD 198, largely in Prince George’s County. “If access to Burtonsville is eliminated, Burtonsville is going to be eliminated, and Konterra will be the big winner.” Konterra, a regional mall in a complex similar to Columbia, will have its own Interchange along I-95.
- Briggs Chaney
- Cloverly
- Columbia and Howard County
- Laurel
- Burtonsville and its lack of redevelopment

- Cherry Hill Road east of 29
- West Farm, off Randolph Road
- Maple Lawn Farms, Fulton – “elite retail center with dining”
- Silver Spring
- Internet

## Summary of Interviews with Select Community Members

Seven one-on-one interviews were conducted with Burtonsville community leaders on February 23-28. These included the local elementary school principal, chair of the Fairland Citizen Advisory Committee, president of the Patuxent Watershed Association, vice chair of the East County Citizen Advisory Board, director of the East County Regional Center, and key residents. Community leaders described their attraction to Burtonsville, their dislikes, and their visions for the future – particularly regarding the commercial sector along US 29 and MD 198.

Interviewees responded to the following:

- Why attracted to Burtonsville
- What's gone wrong?
- Perceived strengths of retail/commercial sector compared to earlier
- Where people shop
- Missing amenities – retail, recreational, transit
- Impacts of road realignments
- Best location for a "Town Center"
- Burtonsville Shopping Center and types of anchors
- Visions for Burtonsville

*Why attracted*

Reasons mentioned include:

- Centrally located between Baltimore and Washington, DC
- Near Howard and Prince George's counties
- Low density and country-like atmosphere (20 years ago)
- Proximity to I-95 and US 29
- Rural community

- Charming at outset
- Close to work; short commutes
- Affordability of housing
- Montgomery County schools
- "Absolutely" meets needs
- Tremendous potential, although undefined
- Mix of restaurants

*<u>What's gone wrong?</u>*

Residents are quick to mention Burtonsville's shortfalls as a place to live:

- "Things are changing dramatically: Overgrown and overcrowded."
- Losing the flavor of what Burtonsville was as a rural community; lost the Lion's Den (community center), a golf course.
- Under serviced. "We have all these homes and we have a tremendous amount of congestion. I don't see that we have services available for all these houses."
- "Lovely little stream" is now a drainage swale that overflows when it rains. There's pollution in the streams.
- "So much development in an impervious area. So much runoff from construction. It comes down to the footprint. We get squeezed by the development…It's choking."
- Exhaust from the traffic. "I go out on my deck in the mornings and it's gagging."
- Churches become mega-churches; trees are cut, parking lots are enlarged.
- Regulations are not enforced.

And point to perceived shortcomings in the shopping district:

- Lack of coherence of vision.

- "Horrible-looking appearance" of commercial area…aesthetically unpleasing…it has deteriorated.
- Potential is not realized because of many small, fragmented business ownerships.
- Business owners are not investing back in their property; not perceived to care about Burtonsville; described as uncertain about their future.

*Current retail/commercial strengths*

There is a dichotomy. The shopping district may meet consumer needs, but "doesn't capitalize on the potential of consumers."

Residents see a "reasonable variety" in the combined Burtonsville Crossing, Burtonsville Shopping Center, and MD 198 strips that meets the needs of the local residents. Says one resident, "Burtonsville has all the convenient shopping I could ask for…the stores are of good quality." Residents use and appreciate the Giant supermarket, CVS pharmacy, affordable restaurants, Baskin and Robbins, shoe repair shop, automotive shops, low-price gasoline. Cheeburger Cheeburger appears to be a popular new restaurant, especially among young adults and families. Seibel's is a mainstay. The Dutch Country Farmers Market is a big draw to local residents and customers beyond Burtonsville. It is open Thursday - Saturday. (Used to be seafood market open daily)

One resident observed that the business district doesn't necessarily meet the needs of younger families with children as shopping for variety and lower prices could be issues. Another interviewee noted the options in grocery shopping outside Burtonsville – such as the Safeway in Briggs Chaney, Shoppers Food Warehouse in Laurel, Super Fresh on Cherry Hill Road, and Trader Joe's near Four Corners on US 29. Whole Foods was not mentioned as an option.

A positive about the Burtonsville community: "I know the mechanic at the car shop…the grocer. That's important to me."

Some community leaders say Burtonsville's shopping destinations haven't changed much in the past 10 years; others say the quality of shops has improved. The office complex is described as "pleasant" and has "green space." But the "eyesore factor" can't be overlooked. "We have gone from a rural community to helter-skelter growth." Several cite the open bays and cars strewn about at the auto repair next to Seibel's. The perception among some is that overall there is "serious neglect of properties – not a penny is put back into them…the cheapest materials are used as maintenance – not for investment."

About MD 198 – "there is nothing appealing. It looks like a hodge-podge. You use these shops because you are accustomed to them, not because you are drawn to them. It's like if you build a house in the 1700s and you add pieces through the years with different materials and designs. Not cohesive. Ugly."

*Missing amenities*

A variety of possibilities are mentioned – signage, types of stores, recreation/entertainment, and alternative transit

- Signage: Better and smaller signage for shops, not "tawdry." Better signs for trails. Better signs for shopping centers and for directions along state highways.
- Bookstore, like Barnes and Noble or Borders
- Trader Joe's
- Bloom's, described as a kind of "Food Lion with pizzazz"
- Gourmet food shop
- Cracker Barrel; other family-oriented restaurants
- Home organizing or décor shop
- Small public golf course like mini golf or putt-putt
- Commercial gym like Fitness First or Gold's Gym
- Park and playgrounds
- Family-oriented entertainment
- Walkability
- Sidewalks and pedestrian linkages
- Bike trails
- Bus stops at commercial centers, including Burtonsville Shopping Center
- A tram or trolley linking the Park and Ride behind Burtonsville Crossing to serve the entire shopping district; similar to the Bethesda Trolley and the downtown Silver Spring Van Go shuttle bus – both free. A local trolley car in Louisville, Kentucky, was also referenced. Such transit helps define "a sense of place."

Although there is no movie theater within five miles of Burtonsville, a county leader remarks that teenagers tend to hang out at theaters. "You want people to patronize for a specific purpose, and move on." Movie theaters would require ample security. Even so, young people too need a place to go and something to do.

*Impact of Road Alignments*

The Burtonsville community is aware that the US 29 realignment has made it harder for drive-by traffic to stop. The realignment has made it "confusing, extremely inconvenient, cumbersome, and frustrating," says one community leader. A resident guesses that some businesses have been hit hard; she finds it more difficult to get to Ace Hardware, for example. To get to Burtonsville Crossing traveling north on US 29, you must now make a left turn. Prior to the realignment, Burtonsville Crossing was located on the right of US 29. There's a "clear need for better signage and reorienting entrances."

Alternatively, some say that access has improved for Burtonsville residents. And that proposed changes to MD 198 will be the next step to benefit local residents.

Regarding the potential widening of MD 198, sensitivity is expressed about the possible loss of property by business owners; compensation should be a consideration. "It's a practical solution, but it will probably kill the businesses south of MD 198," says one.

Residents want the speed to be controlled along MD 198. "Turning lanes are needed with green space on each side." So are sidewalks that connect neighborhoods to shopping district.

Regarding the access road – also referred to as the loop, ring or service road – there is no consensus about its configuration. Here is a collection of opinions:

- Other alternatives to the road behind should be explored.
- Find a way to accommodate businesses that could have parking [inconveniently] located in the rear of stores along access road.
- A practical solution for local shoppers/local traffic only.
- A user-friendly solution to alleviate present traffic along MD 198.
- A potential shortcut to US 29 and a bypass to the shopping centers; thus, a hazard to Burtonsville Elementary School because "people speed."
- Raises speed and safety issues to be addressed.

One resident said, "With the Burtonsville Elementary School there, we don't need that much traffic. This is a potential for disaster. We have a lot of little kids and a lot of people with no ties with the community back to back. And I don't like it."

*Best location for a Town Center*

Here are the options, according to the interviewees:

- The crossroads at US 29 and MD 198 because "it wouldn't impact the residents and their homes." "Overlay the Town Center right over the center of Burtonsville at the intersection." "Span all four corners with crisscrossing pedestrian walkways. Look to the future and to areas [like] Silver Spring. Consider building up and not just building out."

- On the side of US 29 where Burtonsville Crossing is located.

- Along the MD 198 alignment: "The Old Columbia Pike/29 alignment doesn't go anywhere." "Would have to redo shops along MD 198."

- Where it appears in the Master Plan – from the Free State gas station and encompassing Seibel's and the current Burtonsville Shopping Center with CVS, Dutch Market, and other shops. "This is conducive to residents." However, impact on Burtonsville Crossing is not known as a stand-alone shopping center.

*Burtonsville Shopping Center and types of anchors*

According to the Fairland Master Plan (1997), this shopping center is viewed as the launch pad for Burtonsville's revitalized Town Center to draw people to Burtonsville. "That would be good – everybody benefits. As long as cars don't fly through my school property," says the Burtonsville Elementary School principal.

An anchor has not been identified; Burtonsville community leaders have their diverse opinions:

- The anchor would attract people to that store, and not necessarily to the other stores.

- Pedestrian access would need to be improved to attract shoppers to the other stores.

- The anchor will make for more traffic congestion. It will not necessarily make Burtonsville a better community.

- Acceptable anchors to some are mid-sized grocery stores, such as Bloom's and Trader Joe's.

- Mixed-use development, such as town-homes, would be amenable in scale and character to a village concept.

- The anchor that attracts shoppers from outside Burtonsville can be an economic development incentive and dovetail nicely with the Town Center that serves the local population. In this scenario, Borders, Barnes and Noble, Sam's Club, Home Depot, or Wal-Mart are mentioned.

Costco was also mentioned in an interview as an unacceptable anchor, even though the developer has emphasized that a "Costco, K-Mart, or Wal-Mart" was "never our goal. That was the polar opposite of what we were trying to achieve." Said one resident, "We don't want a warehouse store, a big magnet where people come in and leave their trash behind."

*Visions for Burtonsville*

What does Burtonsville want? A revitalized shopping district of stores appealing to residents with a "homey feel" along with protecting the quality of life for the entire community top the list. "A sense of place and a place to go." "A small-town feeling where you bump into people you know." "An opportunity to gather, to have fun, to become more knowledgeable about something – galleries, food, entertainment, leisure, camaraderie, education, and a sense of purpose." "A place where people embrace a small town feeling with big arms. That makes everybody feel like they are a part of it."

Also welcome: more "innovative solutions…designs and developers – the value of bringing fresh eyes" to the situation.

Whatever happens, it must be done soon. Competition is pressing from Konterra and the proposed Laurel Mall revival. Burtonsville must get up and running. It needs outside economic development. One approach might be for Konterra and Burtonsville development to "get together" to benefit both Montgomery and Prince George's counties.

But people are slow to change. "Change is frightening."

Recommendations for shopping –

- Neighborhood retail with a village ambiance

- "A mixture of country and urban. I'm seeing two things: Old Columbia Pike with Seibel's at the Town Center, which is a complex for the community. At the far end and removed from that is a big anchor store so that people coming up and down US 29 can stop and shop. You get the sense of community from the Town Center near the elementary school. Stop and shop, if you like, park and ride the tram and visit with us at the Town Center. That's dual purpose: economic development with a small town pleasure."

- Make Burtonsville appealing to the eye. "It's got to be the same look," not necessarily elaborate, "but uniform." Improve the appearance of shops along the north side of MD 198. "If they want to draw more customers, they are going to have to do a facelift."

- A cohesive town center. "The vision for both the Burtonsville Shopping Center and the MD 198 stores must match.

- Keep "community assets" such as lawn mower and auto repair.

- Need for a short-term and long-term marketing plan for the business community – in light of road realignments.

Recommendations for community amenities --

- A community center for kids near the library and a gym where kids could go after school.

- Focus on the arts, such as a studio for the arts, high-end weekly flea market, and a dinner theater similar to the former Burn Brae.

- A multi-cultural center that could be converted into a theater or a dance hall and used for "classy craft shows," similar to events at the Montgomery County Fair Grounds; also similar to the Cabin Fever Arts and Crafts Festival in Frederick. "Not everybody wants to come to Rockville." This center could be a combined public-private partnership. It could also house a museum to preserve the history of Burtonsville.

- Revive the "Public Square" in the Master Plan where families can gather for ice cream, coffee.

- Improve public schools to attract more local children and build a sense of community.

- More sidewalks that connect the community, including along MD 198.

- "Cycle avenues" to and within Burtonsville.

- A pedestrian arch over the old US 29.

- Improved traffic circulation and safety. One example: improve the north exit off US 29 and right turn onto old 29. "Unattractive – a tiny circle. How can trucks even navigate it?"

- Capitalize on family activities to keep Burtonsville safe from crime; prevent any negatives, such as gangs and drug use to be drawn in.

Viewed as Town Center models:

- Olney shopping center across from Shoppers Food Warehouse

- A Kentlands or Georgetown look that would be a "shared vision"

Regarding the environment –

- More storm water management..."more attention paid to water runoff." This is an especially critical issue because the north side of MD 198 is at the high point of the watershed, thus affecting water runoff and the hazards of wet roads. It's essential to protect the watershed with "good guidelines with teeth in them."

- Better air quality protection. Consider roundabouts in place of traffic lights where cars idle. Put legislation in place to prevent big trucks along MD 198, for example from "spewing exhaust" and polluting the air.

- Slow down development. The TDR [Transfer Development Rights] is perceived by one interviewee as “what killed what Burtonsville was. And now we are trying to pull the Phoenix out of the ashes.”

*Critical roles for Montgomery County and Maryland*

Community leaders were less specific than business leaders about significant role for county and state government. They did recommend the following possibilities:

- Declare Burtonsville a “renovation district.” It’s the gateway to Montgomery from Howard and Prince George’s counties, also from Baltimore.

- Improve signage throughout the community.

- Address environmental issues described above, particularly regarding storm water management and air pollution. This seems urgent.

- Enhance traffic safety, crime safety.

- As business leaders noted, compensate owners for loss of property and parking spaces; also for negative impacts during construction.

- Be a partner in a multi-cultural center to enrich community life.

## Introduction

Potomac Incorporated, a market research and strategic consulting firm based in Bethesda, was commissioned by the Montgomery County (MD) Department of Housing and Community Affairs, to conduct a telephone survey among Burtonsville residents.

With this study, the County fundamentally wants to know:

- What do the people of Burtonsville prefer for their community – and especially their shopping district?

- What do the local residents believe will transform the crossroads area into a Town Center and more vibrant commercial core?

The consumer shopping survey is one element in a three-part market study being undertaken in the Burtonsville, East County area. The additional elements are:

(1) A comprehensive summary of one-on-one interviews with select community and business members

(2) Trade market research for retail merchandise and services.

This neighborhood shopping survey focused on consumer shopping habits of local residents living within a one-to-three mile radius of the U.S. 29 and MD 198 crossroads.

## Objectives

The survey was designed to measure:

- Shopping habits of local consumers at the Burtonsville crossroads of major routes US 29 and MD 198
- Overall consumer satisfaction with shopping in Burtonsville
- Shopping areas outside Burtonsville frequented by local residents
- Frequency of dining in Burtonsville restaurants
- Impact of road changes, such as the U.S. 29 realignment, on local shopping habits
- Town Center concepts favored by Burtonsville residents
- Preferred recreational amenities
- Recommended stores or services not presently in Burtonsville; and
- Core demographics

## Project Team

For this project, we worked closely with DHCA staff who consulted with other county government and community representatives for topical input.

Potomac developed and revised the survey questionnaire, after final consultation with DHCA staff.

Final wording and ordering of the questionnaire was determined by Potomac Incorporated, an independent survey research organization.

## Research Method

This Burtonsville market survey was conducted by telephone over a three-day period, March 15 – 17, 2007.

A total of 500 adult residents were interviewed within the neighborhood region surrounding Burtonsville, using a random digit dial (RDD) sampling approach.

Potomac defined the Burtonsville study area using census tracts as a lowest common denominator tool for creating close-in geographic boundaries. A map (page 4-8) is attached for defining the targeted geographic areas.

We used Briggs Chaney Road as the convenient east-west demarcation line for creating unique geographic markets for this study.

The areas closest to the Burtonsville commercial core (those residents living north of Briggs Chaney) have been dubbed the Neighborhood Market Area (NMA) for this survey and consisted of these five census tracts:

- 14.08
- 14.09
- 14.10
- 14.16
- 14.17

The secondary target (south of Briggs Chaney) included these two census tracts:

- 14.12
- 14.14

A significant number of interviews were done in both the neighborhood (northern) area (n=274) and the southern secondary area (n=226) to offer quantitative reliability in examining each area's results.

Potomac employed a random digit dial (RDD) sampling method.

This commonly-used survey research technique relies upon random computer generation of telephone numbers within area codes and prefixes that are known to contain working residential telephone numbers. Potential numbers are generated in proportion to the population of listed residential telephone numbers and recent move-ins, both of which would be excluded from most residential telephone listings.

RDD sampling connects with businesses, faxes, and other ineligible numbers, along with qualified residential numbers. Once a person was reached, they were screened to ensure they were over 18 and lived at that address.

Within each household, an age and gender distribution was achieved using the "last birthday" method; in other words, we asked to speak with the household resident who was at home and had the most recent birthday.

The interviewers also confirmed respondents' local residence so they could be placed in the proper sampling group.

All telephone numbers were live-dialed by our interviewers in order to establish positive rapport at the outset of the telephone call and minimize non-response bias.

The RDD approach is the most representative possible means of achieving a true cross-section of all adult residents in the targeted geography. Among its advantages:

- Interviewer-assisted data collection ensures that questions are not skipped and other respondent error is not introduced into the survey.
- A rigorous callback regimen ensures that each sampled telephone number has a viable opportunity to be converted into a completed interview. Our standard is a minimum of four callbacks at various times of day and days of the week.
- Computer-assisted telephone interviewing (CATI) ensures that survey responses are entered into the data file instantly and accurately.
- Unlisted telephone numbers are included in the eligible pool, along with recent move-ins, who might be excluded from a listed sample.

## Margin of Sampling Error

According to customary statistical standards, this sample of 500 Burtonsville residents produces a maximum margin of sampling error of +/- 4.5% at a 95% confidence level. This means that 95% of the time, the "true" figure would fall within this range if every adult resident of the targeted geography had been interviewed.

For smaller subgroups of the overall sample, the potential sampling error is larger. The following chart outlines the maximum sampling error associated with sub-samples of varying sizes:

| Sample Size | Sampling Error* |
|---|---|
| 1,000 | ± 3.2% |
| 800 | ± 3.5% |
| 600 | ± 4.1% |
| 400 | ± 5.0% |
| 300 | ± 5.8% |
| 200 | ± 7.1% |
| 150 | ± 8.2% |
| 100 | ± 9.8% |

**At the 95% confidence limits.*

Margin of sampling error is only one of many potential sources of error in this or any other public opinion survey. The practical difficulties in conducting any survey of public opinion introduce other sources of error into this study. Variations in question wording or the order of the questions, for instance, can lead to somewhat different results.

## Field Interviewing

Professionally trained and supervised callers completed the telephone interviews from our call center in Salt Lake City, Utah. Our callers used computer-assisted telephone interviewing (CATI) capability to ensure prompt and accurate data collection. Predictive dialing was not used on this survey in order to achieve the highest level of rapport at the outset of the telephone call, and thereby reduce non-response bias.

Callers were continually monitored for quality and accuracy. Supervisors called back at least 5% of the respondents to confirm the veracity of the interviews. Calls were made between 5:00 and 9:15 p.m. weeknights and 11:00 am and 8:00 p.m. Saturday, Eastern Time. The survey was fielded starting on March 15; it was completed by March 17.

The survey averaged 5 minutes and 25 seconds in length, with a 93% incidence.

## Study Limitations and Interpretations

1. This shopping study was geographically designed to include only Montgomery County residents and exclude those residents who may live in border counties and frequent Burtonsville for shopping purposes (a more typical prime market area).

   It was the view of DHCA staff that the attitudes and behavior of Burtonsville area residents were most important to discern, especially if the County proceeded with improvements requiring public investments and taxpayer dollars.

2. This study area was intentionally separated into neighborhood (primary) and secondary markets for refined analysis. Potomac used the latest census tracts as a low common geographic

denominator for defining the overall study area, with residents living above or north of Briggs Chaney Road being closest to the Burtonsville commercial core.

For planning and community purposes, the reader may want to give greater stock and credibility to the attitudes, preferences, and behavior of those residents living in the study's Neighborhood Market Area (NMA). These special geographic breakdowns are provided in the report's cross-tabulations along with other important demographic subgroups.

3. It is important to note that this neighborhood consumer survey was conducted as the second step in the research gathering process. The first stage included interviews with select community and business members for feedback and recommendations. Both the qualitative and quantitative results were utilized and referenced by our retail and shopping center expert in preparing the market analysis, but the results were also tempered by the latest market data and realistic market assessment.

   For example, the telephone survey revealed the preference of some respondents for more extensive retail and certain types of department stores not now found in the Burtonsville commercial area. These respondents were not presented with the information that creating a larger community or regional shopping area (and substantially increased retail) would bring a disproportionately higher level of traffic on local roads, only worsening an already congested condition. The market analysis also confirms that residents will have even more ample regional shopping opportunities within a reasonable time distance from Burtonsville, thus fulfilling the market's need for major and specific retail outlets in the not too distant future.

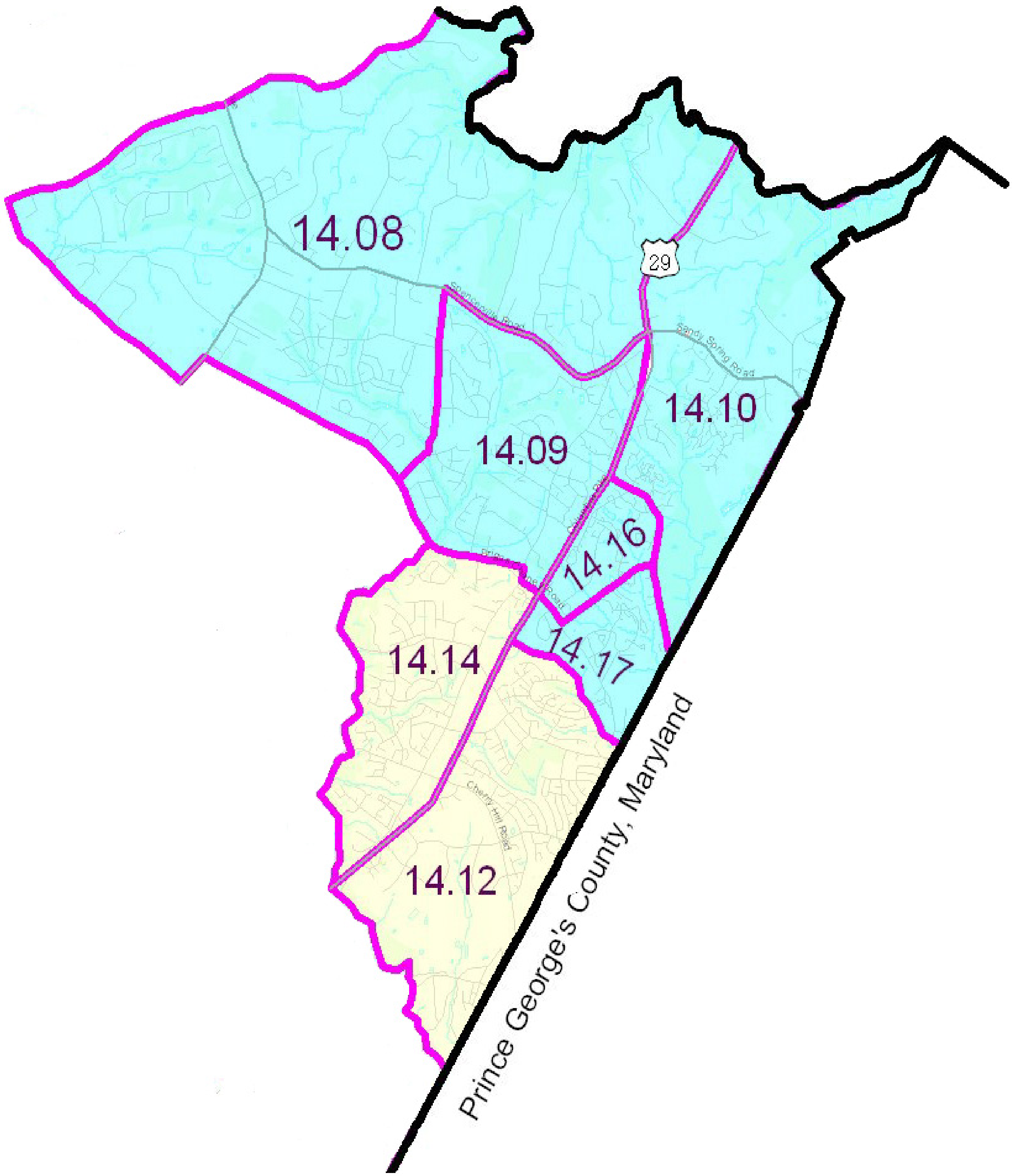
   That is why the reader of this study should place greater weight and more significant credibility on the findings and recommendations contained in the Market Study.

4. Finally, we reference the slight variation between the demographics of this telephone-conducted sample respondent pool, as self-reported and the estimated demographics for the targeted area (from the 2005 census update). Our sample appears to be relatively older, more educated and slightly more female than the existing demographic profile. We report these variations in the below chart.

| | % Sample | % Actual Demographics |
|---|---|---|
| **Gender** | | |
| Male | 40% | 45% |
| Female | 60% | 55% |
| **Age** | | |
| Under 35 | 8% | 32% |
| 35 – 44 | 15% | 27% |
| 45—54 | 20% | 20% |
| 55+ | 55% | 20% |
| Refused | 6% | N/A |
| **Education** | | |
| HS degree | 14% | 32% |
| Some college | 17% | 8% |
| 4-Year degree | 34% | 34% |
| Post-Grad | 30% | 25% |
| Refused | 4% | N/A |
| **Families with Children** | | |
| Kids Under 18 | 34% | 35% 1 |

**Footnotes:**

1. Gender demographics are derived from census tracts calculated for 2000.
2. Age demographics are referenced for 2005 estimates from a 2-mile radius projection from Claritas.
3. Education demographics are derived from 2007 estimates developed and confirmed by Claritas.
4. Households with children under 18 come from 2005 estimates within a 2-mile radius projection from Claritas.

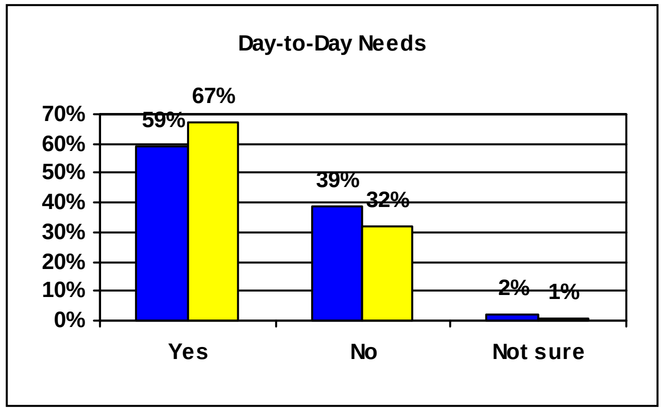

14.08
29
14.09
14.10
14.16
14.17
14.14
14.12
Sandy Spring Road
Cherry Hill Road
Prince George's County, Maryland

## Key Findings and Conclusions

Our main findings of the Burtonsville Consumer Survey are as follows:

1. ***Shopping in Burtonsville meets day-to-day needs***

In responding to the first survey question, 59% of interviewees gave a positive response to meeting day-to-day shopping needs in Burtonsville, while 39% said no; this number jumps to 67% in the Neighborhood Market Area.




As the survey progressed and respondents provided information on where else they shopped in the region, what types of stores and recreational amenities they would like to see, and what would transform Burtonsville into a Town Center, it became clear that residents within a 1-to-3 mile radius of Burtonsville have larger consumer and community needs that are presently being met elsewhere.

2. ***In practice, Burtonsville area residents reach beyond their community to meet shopping needs***

Respondents were asked specifically to indicate their frequency of shopping at Burtonsville Crossing, Burtonsville Shopping Center, and stores along MD 198 and Spencerville Road.

In this comparison, Burtonsville Crossing has the largest pull among residents – with 38% shopping frequently and 26% shopping occasionally. Burtonsville Shopping Center is a close second – with about one-third of the respondents indicating frequent shopping; another 36% report occasional shopping. Stores along MD 198 and Spencerville Road account for 19% of frequent shopping and 27% of occasional shopping.

In a separate question, when asked to name other shopping areas visited in the last 90 days, the three chief Burtonsville shopping destinations above accounted for an additional 8% of volunteered choices – including specific mentions of the Farmers/Amish Market.

3. ***Local residents meet most diverse shopping needs within 10 miles***

Most frequently named "other shopping areas" in order of significance are:

- Columbia Mall
- Cherry Tree Center/Cherry Hill Road
- Laurel Mall/Laurel Lakes
- Briggs Chaney Market Place/Strip Center
- Cloverly Village Shopping Center
- White Oak Shopping Center

The above shopping centers are within 10 miles of Burtonsville, <u>indicating that local residents prefer to shop close to home to meet their diverse needs and that "convenience of location" representing shorter travel time in today's traffic-congested world is an important factor.</u>

In addition, the following shopping areas in Montgomery County were mentioned as next important tier of shopping destinations:

- Wheaton, Downtown Silver Spring, Colesville, Rockville/Rockville Pike, Calverton, Montgomery Mall, Olney, and White Flint

Shopping in Prince George's and Anne Arundel counties appears more modest:

- College Park, Beltsville, Route 1, Arundel Mills Mall, and Fort Meade/Military Base

Interestingly, in the "other shopping areas" category, respondents named Wal-Mart, Costco, and Shopper's Food Warehouse specifically. This is in addition to these same stores being named in Question #11: Wal-Mart – 33 responses, Costco – 30 responses, and Shopper's Food Warehouse – 10 responses.

### 4. ***<u>Present-day dining in Burtonsville draws mixed response</u>***

When asked about frequency of patronizing existing Burtonsville restaurants, respondents were nearly split between dining "frequently" and "occasionally" – a total of 48% – versus "seldom" and "never" dining – a total of 51%.

### 5. ***<u>Restaurants top the list of desired store or service</u>***

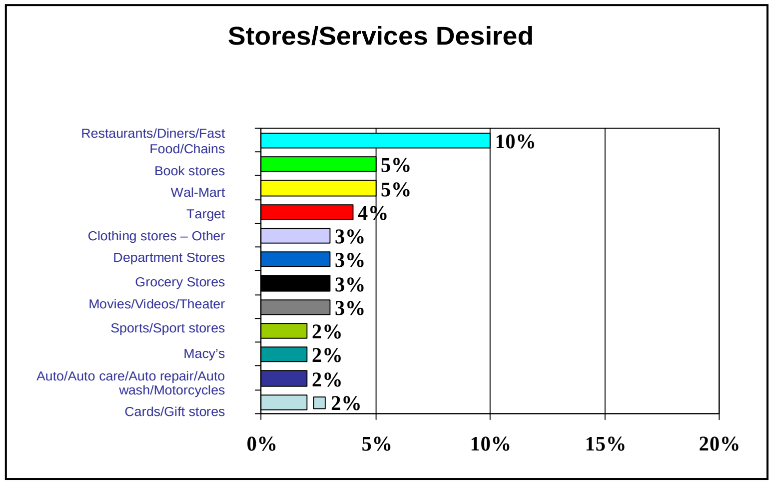
To compare, "restaurants" of all sorts – including fine dining, chains, fast food, diners, coffee/lunch, and cafes – top the list as the most sought-after store or service in 77 responses or more than 15% of those interviewed. "More and better restaurants" are among the four top choices for transforming Burtonsville into a Town Center. Restaurants are the third top choice mentioned as a "recreational amenity."

Types of restaurants recommended: Family, upscale, sit-down, franchise, "more and nicer," "good," "more decent," "better," "better selection," "high-end," "more variety," "more fine dining," "classier," "more appealing," "more diversity and ethnic," "more choices," "more places to eat," "outdoor sitting," seafood and steak, Chinese and Thai, Italian, pizza, ice cream parlor, coffee houses, bars, beer establishment, night club, live music.

Some names of restaurants recommended: TGIF, Ruby Tuesday, Baja Fresh, Chipotle, Colony Grill, Olive Garden, Red Robin, Boston Chicken, Chick-Fil-A, Cluck-U Chicken,

Starbuck's Pizza Hut, Panera, Macaroni Grill, Cheesecake Factory, P.F. Chang's, Chuck E Cheese, and Red Lobster.

### 6. ***Better and more variety of stores score high***




Respondents expressed their consumer shopping preferences in answers to two questions:

***"What's the one thing that would transform current downtown Burtonsville into a Town Center?"***

More than 27% favor "more and better stores"; "bringing big name stores, such as Wal-Mart, Target, or department stores"; and malls and shopping centers as the key elements in transforming Burtonsville's commercial crossroads.

Among the more salient comments:

- "We need more clothing stores for nice clothes.  There are no clothes for women and men."
- "We need more malls, bigger shopping areas…bigger shopping center…"
- "Need more favorable stores…where we can get some things for the family"
- "More shops and food stores."
- "…more upscale shops."
- "There could be a bigger department store like Macy's."
- "A department store because it carries a very large variety of items."
- "More retail."
- "A bookstore…"
- "Retail stores like Target or Wal-Mart…Kohl's… Sears…"
- "Stores for kids and babies, toy stores…"
- "A popular mall with some stores that people are familiar with…"
- "An indoor mall like Wheaton…"
- "Large shopping stores like Wegmans."
- "Organic store like Whole Foods or Trader Joe's."
- "Rebuild the shopping centers…make it much bigger."
- "A Town Center has a number of stores to attract people even though it's a crossroad."

Respondents referred to the convenience of being able to shop closer to home, "employment opportunities" for students closer to home, and the importance of the Dutch Country Market to Burtonsville.  Said one respondent, "If it [Amish Market] is not going to be there, I won't go there any more." Another respondent expressed the expectation that a big mall or shopping center was going to be built in Burtonsville.

***"Name a store or service you would like to see in Burtonsville that isn't already there."***

While restaurants topping the list, more than half the responses for this question indicate specific types of stores – from large stores to specialty-type shops.

Wal-Mart and Target, respectively, attracted the third and fourth largest number of responses.

Book stores, such as Borders or Barnes and Noble, is the second most desired type of store. Shoppers Food Warehouse is the most frequently mentioned grocery store.

Overall, stores most frequently requested by name include Wal-Mart, Target, Macy's, Best Buy, Kohl's, K-Mart, JC Penney, Sears, Costco, Sam's Club, Shopper's Food Warehouse, Wegmans, Trader Joe's, Whole Foods and Farmers Market.

When combined with generic categories of "department store," "grocery store," "clothing/shoe stores," "book stores" and "home goods/fabric/appliance stores," altogether these stores represent more than 41% of the aggregate of ALL responses.

Among the comments:

"There should be another Wal-Mart or Target type of store near U.S. 29."

"The stores or services that I would like to see in Burtonsville are Macy's and Nordstrom, little boutiques like Bebe or even Old Navy and Gap."

"…LL Bean Store, Macy's and JC Penney."

"Macy's; Bed, Bath and Beyond; Wal-Mart; K-Mart; Target and a craft store like Michael's."

"I would like to see Marshall and TJ Maxx, and also a home goods store."

: I'd like to see the Sam's Club, Wal-Mart, Costco, Targets, Super Shoppers…"

"A DSW Shoe Warehouse."

"We need a bookstore here."

"I want Burtonsville to have Best Buy, book stores, Shoppers Food Warehouse, and craft stores."

"…A children's store, like Babies R Us, Baby Gap and Baby Guess….more children's clothing."

"I would like to see Wegmans and Whole Foods."

"I would like to see Borders, Barnes and Noble bookstores, and toy stores."

"We like to see JC Penney and Wal-Mart.  If we can get a Wal-Mart here, it would be fantastic."

"Lord and Taylor."

"Large department store."

"Beauty salon."

"Musical instrument store to encourage people to be more into arts…and ice cream store where kids can meet each other and talk…"

"A pet store where you can buy a tropical fish or dog food."

Other categories of stores mentioned: movies/videos/theaters/, sports stores/ auto care and repair, craft, cards/gift, specialty food, drug/pharmacy, health/beauty/spa, hardware, toy, bakery, discount, office supply, music, night life, banks, dry cleaner's and jewelry.

### 7. Movie theater, parks and playground are chief recreation choices

Burtonsville area residents -15% of 682 total responses – most frequently mention "movie theaters" as the most desired recreational amenity. Second most requested amenity is "park and playground," say 7% of the total aggregated responses.

When parks and playground are combined with other exercise and fitness activities – such as sports, bowling, hiker biker paths, exercise/fitness center/gym, swimming, games, and miniature golf, this percentage climbs to nearly 30% of the total responses.

Burtonsville area residents also indicated a preference for recreational, senior and educational centers; libraries; community activities; family-oriented and kids' activities; music; arts and crafts, theater, dancing, bars, and Internet cafes.

Respondents presented a wide range of desired activities from playing jazz to tennis, pool halls to roller skating rinks, gyms, soccer games, athletic center, horseback riding trail, football, basketball, hiking, fishing, teen club, festivals and musical performances, indoor sports, outdoor fountain "where people can congregate," bingo, arts and crafts classes, and live music.

Restaurants scored third highest as a "recreational amenity" in answering Question 10.

### 8. Burtonsville town center attributes vary

Burtonsville area residents know what components they would like in a Town Center, but there does not yet appear to be a unified, clear-cut vision for its location, style, or look. Said one respondent: "It should be a square;" said another, "make it more circular or squared" with shops all around. "It should be a mall, "said a third, or a "Main Street Center where there is a big parking space for shoppers…where people can congregate [around] a fountain, where there are attractive storefronts and the electrical wires [are] placed underground."

Another respondent summarized: "The things that would transform current downtown Burtonsville into a town center would be redevelopment like making walkways, a few more businesses to spread out, large department stores, and the widening of 198."

As mentioned above, respondents want more and better stores – including big-name stores - and restaurants. Ranking in importance are pedestrian improvements, including safer walkways and sidewalks, better traffic patterns, improved mobility, and easier access throughout Burtonsville.

Burtonsville area residents also want their community to have a movie theater and more entertainment opportunities, more parkland and trees, better bus service and transit options, a community center and related activities for all ages, a revitalized core, indoor and outdoor sports, more parking, and more businesses. They want the Burtonsville crossroads to be more effectively marketed and advertised – including improved outdoor signage – to draw people to their commercial center. They want Burtonsville to have a sense of "aesthetics," to be cleaned up, beautified, landscaped, illuminated with street lights, and storefront appearances improved and revitalized, particularly along MD 198.

Good security was also mentioned to discourage loitering, crime, and property damage.

### *9. <u>Pedestrian accessibility and transit can build a sense of community</u>*

For some, downtown Burtonsville is perceived to be a "bunch of street lights and highways" where it's impossible to walk because of the traffic.

Respondents point to the need for:

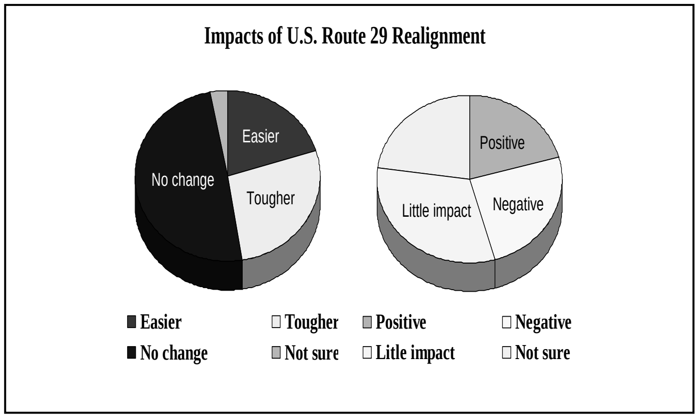
- "More trails, more places to walk to…"
- "More walkways."
- "More walking paths."
- "A walking place."
- "A pedestrian mall."
- "Sidewalks and parks."
- "Pedestrian bridges" for safety.
- "Pedestrian walk with shops."
- "Pedestrian-friendly" walking paths.
- "Easier access and sidewalks."
- "More sidewalks, lighting, and a wide space for parking."
- "More walking accessibility."
- "More walking while shopping."
- "Public transportation" [as] some bus service is said to stop during weekends.
- More Metro buses with stops near shops and businesses.
- Transit linkage between the shopping centers.

Frustrated by traffic congestion, residents ask for a "better traffic flow" throughout the commercial area. Perceived as dangerous, MD 198 is described as requiring widening, a turning lane for easier access to stores, and improved traffic light control. One respondent recommended a bypass road to ease access to shopping along MD 198.

Respondents also express the need for better parking, especially along MD 198.

***10. U.S. 29 realignment perceived to impact local shoppers less than business owners***

About half the respondents see "no change" in the impact on their local shopping trips. Twenty percent say trips are easier, while 27% say the trips have become more difficult. In contrast, 25% of local residents believe that business owners have been negatively impacted, 21% positively impacted, and about one-third have had little impact.




***11. Keep Burtonsville the same, say a minority of respondents***

Three percent of ALL 649 responses regarding "transforming Burtonsville into a Town Center" say "no changes are needed – everything is fine, as is." Six percent of all 724 responses regarding "naming a store or service in Burtonsville that isn't there" say "no changes are needed – everything is fine, as is."

- "It is one of the few places in the entire suburban area that is quiet. I would not change it and would leave it alone," said one respondent.
- "There are already so many things there. I can't imagine what to improve since I am perfectly satisfied with Burtonsville."
- I really don't know because I usually shop outside of Burtonsville."
- "I do not want to see any other stores."

One respondent would not welcome large container stores in Burtonsville for fear that local businesses could not compete.

***12. A good chance to recapture shoppers***

Based on the results of this consumer survey, it appears that with more and better restaurants, major stores, movie theaters, parks and pedestrian improvements, Burtonsville stands a good chance of recapturing lost shopping behavior and satisfying residents' needs in a "livable community" environment.

With transit and pedestrian enhancements, Montgomery County and the State of Maryland could help Burtonsville move toward smarter growth objectives that will help conserve energy and protect the environment in this once rural community.

## Questionnaire

## Consumer Shopping

1. Does shopping in Burtonsville provide for most of your day-to-day needs?
   Yes ....................59%..........67%
   No......................39%..........32%
   Not sure/Refused........2%............1%

For each of the following shopping areas, tell me whether you shop there frequently, occasionally, seldom, or never. *[ROTATE ORDER]*

2. Burtonsville Crossing
   Frequently .............38%..........53%
   Occasionally............26%..........24%
   Seldom .................14%..........11%
   Never...................18%..........10%
   Not sure/Refused........4%............1%

3. Burtonsville Shopping Center
   Frequently .............32%..........43%
   Occasionally............36%..........34%
   Seldom .................15%..........11%
   Never...................14%............7%
   Not sure/Refused........4%............4%

4. Stores along Maryland 198 and Spencerville Road
   Frequently .............19%..........28%
   Occasionally............27%..........30%
   Seldom .................21%..........23%
   Never...................31%..........18%
   Not sure/Refused........2%............1%

5. Name other shopping areas where you shopped in the last 90 days. *(PRE-CODED LIST; DO NOT READ; ACCEPT MORE THAN ONE CHOICE.)*

| | (N=991) | (N=551) |
|---|---|---|
| Columbia Mall (144) | 15% | 20% |
| Cherry Tree Center/Cherry Hill Road (115) | 12% | 6% |
| Laurel Mall/Laurel Lakes (95) | 10% | 13% |
| Briggs Chaney Market Place/Briggs Chaney Strip Center (86) | 9% | 9% |
| Cloverly Village Shopping Center (71) | 7% | 10% |
| White Oak Shopping Center (55) | 6% | 3% |
| Wheaton (43) | 4% | 4% |
| Downtown Silver Spring (40) | 4% | 5% |
| Burtonsville Crossing/Burtonsville Shopping Center/MD 198 (40) | 4% | 4% |
| Colesville (29) | 3% | 3% |
| Rockville/Rockville Pike (26) | 3% | 4% |
| Calverton (25) | 3% | -% |
| Montgomery Mall (13) | 1% | 1% |
| Olney (13) | 1% | 2% |
| White Flint (9) | 1% | 1% |
| College Park (8) | 1% | -% |
| Beltsville (7) | 1% | -% |
| RT 1 (7) | 1% | 1% |
| Arundel Mills Mall (6) | 1% | 1% |
| Military Base/Fort Meade (6) | 1% | -% |
| Wal-Mart (5) | 1% | 1% |
| Orchard Center (5) | 1% | -% |
| Costco (4) | -% | -% |
| Shopper's Food Warehouse (4) | -% | -% |
| Four Corners (3) | -% | -% |
| Other *(Volunteered)* (81) | 8% | 7% |
| None/Haven't Shopped (26) | 3% | 3% |
| Not sure/Refused (25) | 3% | 2% |

*[Verbatim Responses Captured in Final Report]*

## Dining

6. How often do you patronize Burtonsville restaurants? *(If prompted… either eat at or carry-out.)*

| | | |
|---|---|---|
| Frequently | 15% | 20% |
| Occasionally | 33% | 36% |
| Seldom | 29% | 30% |
| Never | 22% | 14% |
| Not sure/Refused | 1% | -% |

## Road Changes

7. Has the U.S. Route 29 realignment made your shopping trips in Burtonsville easier, tougher, or has there been no change?

| | | |
|---|---|---|
| Easier | 20% | 19% |
| More difficult | 27% | 29% |
| No change | 49% | 49% |
| Other *(volunteered)* | -% | 1% |
| Not sure/refused | 3% | 3% |

8. From what you have seen, has the U.S. 29 realignment had a positive or negative impact on Burtonsville businesses, or has there been little impact?

| | | |
|---|---|---|
| Positive | 21% | 21% |
| Negative | 25% | 28% |
| Little impact | 32% | 33% |
| Not sure/Refused | 23% | 18% |

## Town Center

9. A Town Center is characterized by a sense of place and community with pedestrian-friendly opportunities for people whether or not they're shopping… In one or two words, what's the one thing that would transform current downtown Burtonsville into a Town Center? *(Accept all responses.)*

| | (N=649) | (N=379) |
|---|---|---|
| Need more and better stores like clothing/retail (94) | 14% | 15% |
| Pedestrian improvements/sidewalks (62) | 10% | 11% |
| Better traffic patterns/Improved mobility/Easier access (59) | 9% | 11% |
| More and better restaurants (53) | 8% | 10% |
| Bring big name stores/Wal-Mart, Target, Department (26) | 4% | 4% |
| Improve MD 198 (21) | 3% | 5% |
| Malls/Shopping Centers (17) | 3% | 3% |
| Add movie theater/Movie houses/More entertainment (16) | 2% | 3% |
| Add parks/More parkland and trees (14) | 2% | 2% |
| Aesthetics (10) | 2% | 2% |
| More marketing and advertising of the area (8) | 1% | 1% |
| More transit options/Better bus service (8) | 1% | 2% |
| Offer community activities/Place for people to go/ Community center (8) | 1% | 1% |
| Create Town Center with real revitalized core (8) | 1% | 1% |
| More and improved parking (8) | 1% | 1% |
| More businesses (7) | 1% | 1% |
| Add sports, such as bowling alley and skating rink (4) | 1% | 1% |
| Other (35) | 5% | 6% |
| No changes needed/Everything is fine as is (21) | 3% | 4% |
| No ideas/Not sure/Can't say/Refused (170) | 26% | 16% |

*[Verbatim Responses Captured in Final Report]*

10. Additionally, what types of activities would you like to see as recreational amenities: *(PRE-CODED. ACCEPT MORE THAN ONE CHOICE)*

| | (N=682) | (N=391) |
|---|---|---|
| Movie Theater (105) | 15% | 17% |
| Park and playground (50) | 7% | 8% |
| Restaurants (44) | 6% | 7% |
| Sports (39) | 6% | 6% |
| Stores (37) | 5% | 6% |
| Bowling (28) | 4% | 4% |
| Hiker biker path/Jogging trail (28) | 4% | 5% |
| Exercise/Fitness Center/Health/Gym (21) | 3% | 4% |
| Swimming (18) | 3% | 3% |
| Centers/Recreational/Senior/Educational (9) | 1% | 2% |
| Libraries (8) | 1% | 1% |
| Games (7) | 1% | 1% |
| Community Activities (6) | 1% | 1% |
| Kids (6) | 1% | 1% |
| Music (5) | 1% | 1% |
| Bars/Beer (4) | 1% | 1% |
| Transportation (4) | 1% | -% |
| Mini Golf (3) | -% | -% |
| Arts/Crafts/Painting/Drawing (3) | -% | 1% |
| Family Oriented Activities (3) | -% | 1% |
| Pedestrian Access (3) | -% | -% |
| Theater (3) | -% | -% |
| Landscaping/Trees (2) | -% | -% |
| Internet Café (1) | -% | -% |
| Dancing (1) | -% | --% |
| More for Grownups (1) | -% | -% |
| More parking areas (1) | -% | -% |
| Town Square (1) | -% | -% |
| Not sure/Refused (241) | 35% | 30% |

*[Verbatim Responses Captured in Final Report]*

11. Name a store or service you would like to see in Burtonsville that isn't already there. *(PRE-CODED. ACCEPT MORE THAN ONE RESPONSE.)*

| | (N=724) | (N=421) |
|---|---|---|
| Restaurants/Diners/Fast Food/Chains/Fine (71) | 10% | 11% |
| Book stores (36) | 5% | 5% |
| Wal-Mart (33) | 5% | 5% |
| Target (28) | 4% | 4% |
| Clothing stores – Other (25) | 3% | 4% |
| Department stores (23) | 3% | 3% |
| Grocery stores (20) | 3% | 3% |
| Movies/Videos/Theater (19) | 3% | 4% |
| Sports/Sport stores (17) | 2% | 3% |
| Macy's (13) | 2% | 2% |
| Auto/Auto care/Auto repair/Auto wash/Motorcycles (12) | 2% | 2% |
| Cards/Gift stores (12) | 2% | 2% |
| Specialty food stores (11) | 2% | 2% |
| Craft stores (11) | 2% | 1% |
| Best Buy (10) | 1% | 2% |
| Home goods/furnishing stores (10) | 1% | 2% |
| Shopper's Food Warehouse (10) | 1% | 2% |
| Clothing stores – Women (9) | 1% | 1% |
| Electronics or Appliance stores (9) | 1% | 2% |
| Shoe stores (9) | 1% | 2% |
| Kohl's (8) | 1% | 1% |
| Trader Joe's (7) | 1% | 1% |
| Whole Foods (7) | 1% | 1% |
| Coffee/Lunch stores (6) | 1% | 1% |
| K-Mart (6) | 1% | 1% |
| Fabric stores (6) | 1% | -% |
| Wegman's (6) | 1% | 1% |
| Drug stores (5) | 1% | 1% |
| Health/Beauty/Spa stores (6) | 1% | 1% |
| J.C. Penney (5) | 1% | -% |
| Sear's (5) | 1% | -% |
| Toy stores (5) | 1% | 1% |
| Farmers' Market (4) | 1% | -% |
| Hardware stores (4) | 1% | 1% |
| Clothing stores – Men (3) | -% | 1% |
| Bakeries (3) | -% | -% |
| Discount stores (3) | -% | -% |
| Costco (3) | -% | -% |
| Clothing stores – Children (2) | -% | -% |
| Office/Office supply stores (2) | -% | -% |
| Furniture stores (2) | -% | -% |
| Music/Music stores (2) | -% | -% |

Night life (2)....................-%............-%
Post office (2)....................-%............-%
Banks (1)....................-%............-%
Cleaners (1)....................-%............-%
Jewelry stores (1)....................-%............-%
Sam's Club (1)....................-%............-%
No changes needed/Everything is fine as is (42)....................6%............6%
Other (27)....................4%............5%
No ideas/Not sure/Can't say/Refused (159)....................22%............15%
*[Verbatim Responses Captured in Final Report]*

## Demographics

Finally, I have just a few questions for statistical purposes only.

12. How long have you lived at this address? *[RECORD NUMBER OF YEARS AND THEN CODE APPROPRIATE CATEGORY]*

    Less than 2 years....................14%............11%
    3 – 5 years....................17%............14%
    5 – 10 years....................19%............20%
    10 – 20 years....................23%............26%
    Over 20 years....................27%............28%
    Not sure/Refused....................1%............-%

13. Do you have any children under the age of eighteen living at home?

    Yes....................27%............34%
    No....................72%............65%
    Not sure/Refused....................1%............-%

14. What is the last grade of school that you completed?
    Did not finish high school....................1%............1%
    High school degree....................13%............14%
    Some college/Associate's degree....................17%............15%
    4-year college degree/Bachelor's degree....................34%............36%
    Post-graduate work....................30%............30%
    Not sure/Refused....................4%............3%

15. What was the combined income for all members of your household last year?

| | | |
|---|---|---|
| Less than $35,000 | 6% | 5% |
| $35 – 49,999 | 9% | 7% |
| $50 – 74,999 | 15% | 16% |
| $75 – 99,999 | 15% | 15% |
| $100 – 149,999 | 17% | 18% |
| $150,000 or more | 11% | 13% |
| Not sure/Refused | 28% | 25% |

16. What is your age? *(Pause briefly for volunteered answer before reading categories.)* Is it less than 25, 25 to 34, 35 to 44, 45 to 54, 55 to 64, or 65 or over?

| | | |
|---|---|---|
| Less than 25 | 1% | 3% |
| 25 – 34 | 7% | 9% |
| 35 – 44 | 15% | 19% |
| 45 – 54 | 20% | 24% |
| 55 – 64 | 17% | 21% |
| 65 or over | 34% | 20% |
| Not sure/Refused | 6% | 4% |

*(Not asked.)*

17. Gender *(By observation.)*

| | | |
|---|---|---|
| Male | 40% | 38% |
| Female | 60% | 62% |

*(Confirm name for verification purposes.)*

18. Census Tract *[Record]*

| | | |
|---|---|---|
| 701408 | 18% | 33% |
| 701409 | 12% | 22% |
| 701410 | 9% | 17% |
| 701412 | 30% | -% |
| 701414 | 15% | -% |
| 701416 | 9% | 17% |
| 701417 | 6% | 11% |

## Community Recommendations: Based on Interviews and Consumer Shopping Survey

### Physical Space – a gathering place

- Create a town square or center with a focal point like a fountain and a 'homey feel' where local folks can gather, see neighbors, have fun, shop, eat at restaurants and cafes, and learn new things.

### Beautification

- Beautify, modernize, streetscape, and green Burtonsville's central core with an overall plan – predominant role for local government.
- This includes 'facelift' or new facades along MD 198 described as "hodge-podge, helter-skelter growth, eyesore, aesthetically unpleasing, lack of coherence of vision."
- Foster synergy between the revitalizing Burtonsville Shopping Center and the MD 198 shops and restaurants.

### Environmental Protection

- Address numerously reported stormwater drainage issues in residential area.
- Improve the flood plain between Tony's Garage and McDonald's on MD 198; other stormwater issues in business/commercial areas.
- To protect air quality, consider installing roundabouts or circles at certain traffic lights to cut down on idling of truck, bus, and auto engines.
- Enforce existing environmental ordinances, including recycling by businesses.
  NOTE: Montgomery County is expected to legislate key energy efficiency and conservation measures; Burtonsville will want to be in the forefront.

### Development Process

- Streamline and simplify at the County level.
- Enable and encourage incentives at County level and by Maryland/National Capital Park and Planning Commission – including green tape incentives.
- Provide appropriate tools for businesses and property owners to turn their buildings around and adapt to changing geometry.
- Provide financial compensation or assistance for negative impact during construction.
- Compensate landlords to reduce tenants' rent during construction.
- Modify entrances and exits so that businesses are not cut off.

### Parking Possibilities

- More shops and restaurants will require additional parking.
- "Parking is the constraint on development – It affects the types of businesses that are attracted," said one business representative.
- Some owners fear anticipated widening of MD 198 will threaten existing parking: "Losing parking spaces will put me out of business," said one.
- County is suggested to explore suitable parking arrangements to accommodate customers' access to stores from the front instead of the rear of property.
- Concept for consideration: Assign business or property owners credit for parking, calculating how many spaces will be lost during redevelopment

**Connecting Burtonsville – walkable streets, bikeways, local transit, and accessible roads**

- In the consumer shopping survey, the expressed need for pedestrian improvements and sidewalks was second only to the expressed need for more and better stores in transforming downtown Burtonsville.
- Connectedness helps build a sense of community.
- Sidewalks must be walkable – no more than 400 feet in length (super blocks), with cross streets, creating frontage "like a village" to build on.
- Shade trees and other landscaping should enhance the walking experience.
- Also consider a pedestrian arch over the old US 29 to connect the shopping district.

**Traffic Improvements**

- Safety is a big issue. Slow down traffic on MD 198, for example.
- Adjust traffic light timing along US 29 and MD 198 to allow for safer entry and egress.
- Install a traffic light between the two existing lights along MD 198 west of US 29.
- Consider a center lane along MD 198 to make left and right turns.
- Combine a single entry/exit for Jerry's Subs and Pizzas and Tony's Garage.
- Include lanes and trails – "Cycle Avenues" – for bicyclists throughout Burtonsville.
- If feasible to fund, the County could establish a free shuttle linking the Park and Ride lot behind Burtonsville Crossing to the entire shopping district once it's revitalized. Like the *Bethesda Trolley* or *Downtown Silver Spring Van Go.*

**More Retail**

- At the heart of Burtonsville redevelopment.
- Community representatives tend to see more niche-type shops like home décor, book stores, family-oriented entertainment. Consumers surveyed are wide open to almost everything including mall settings and name department or box stores.

**More Restaurants**

- "More and better restaurants" head the list as the type of store or service missing in Burtonsville.
- Seen as a vital ingredient for a vibrant center where people can gather.
- A variety of eating establishments from upscale to family to ethnic to cafes need to be factored into the new Burtonsville downtown.

**More Food Market Choices**

- Giant at Burtonsville Crossing is a mainstay.
- Consumers also shop elsewhere for groceries.
- Consumers express need for more food store choices.

**Retain Amish Market**
- Amish Market is integral to the identification of the Burtonsville community – bridging its early days as a farming center to its present suburban lifestyle evolving as a village center.
- County asked to work with local residents and business community to find suitable location for Amish Market in Burtonsville area.

**Parks and Playgrounds – sports, health, relaxation**
- People in Burtonsville want parks and playgrounds combined with other exercise and fitness activities – sports, bowling, hiker-biker paths, gym, swimming, games, horse-back riding, fishing and miniature golf.
- Tennis, soccer, football, basketball.

**Align Community, Culture, Arts**
- Consider declaring Burtonsville a “renovation district” – gateway to Montgomery from Howard and Prince George’s counties and Baltimore.
- Community leaders would like the County to be a partner in a multi-cultural center that can be converted for theater, dance hall, arts studio, quality crafts and antique shows to enrich community life; serve as a museum to preserve the history of Burtonsville.
- Feature live music, including jazz.
- Consider a community center for children and for adult education and senior citizens’ activities. Also for a Teen club; and for indoor sports, bingo, arts and crafts.
- Outdoor fountain “where people can congregate” – Incorporate with the Fairland Master Plan’s “Public Square” concept for Burtonsville

**Attractive Signage**
- Install handsome signage approaching US 29 and MD 198 crossroads promoting Burtonsville retail center.
- Improve directional signage along US 29 near MD 198.
- Install promotional signage behind Burtonsville Crossing at Park and Ride lot, with Montgomery County approval.
- Look for more opportunities for attractive, helpful signage uniting the community; including shops and trails.

**Web Site**
- Establish or update a Burtonsville web site that creates excitement about expected amenities and changes.

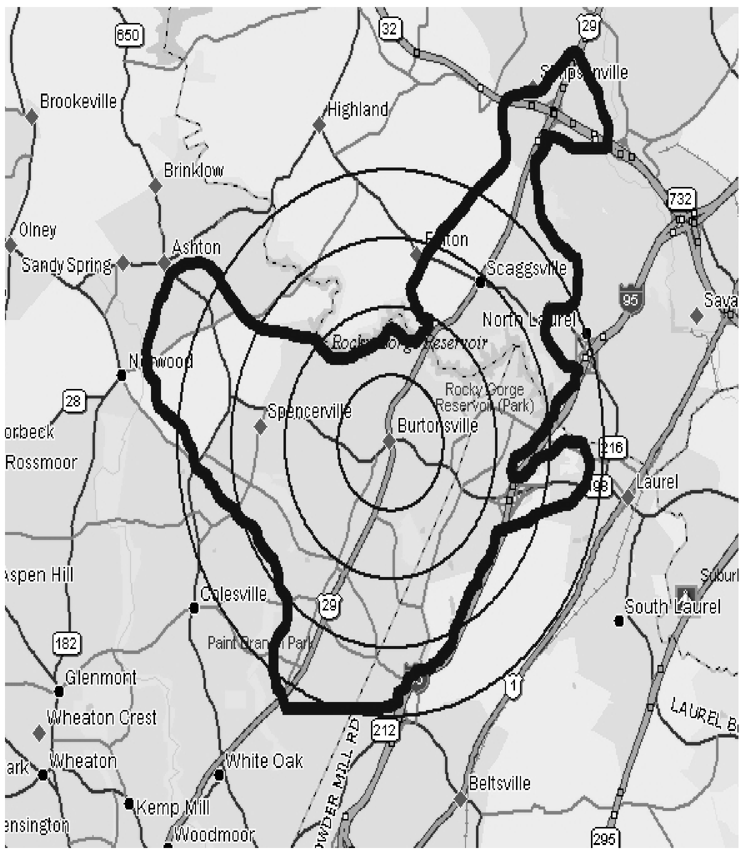
**Branding Campaign**
- Signage and web site anchor cohesive campaign to uplift image of downtown Burtonsville.
- Enlist the *Burtonsville Gazette* and other local media to feature stories about the best of the historic Burtonsville combined with new, improved changes.
- Consider naming amenities with ‘Burtonsville’ – such as a Burtonsville Cultural Arts Center, Burtonsville Sports Center, Burtonsville Diner.

## Research and Data

### 1. The Market Area

The primary market area ("PMA") shown in Figure 1 is the area within a ten-minute drive from Burtonsville. Because of the high-speed Route 29 corridor this ten-minute drive reaches north, just past Route 32, and south to Paint Branch Park. It extends west to New Hampshire Avenue and east to I-95. Some businesses have smaller PMAs and some larger but this is the area from which most businesses in Burtonsville derive 60-80% of their trade. The restaurants have larger PMAs but the gas station has a smaller one, for example. Figure 1 shows the PMA in relation to distances (1-, 2- , 3- and 4-mile rings) from the Route 29/Route 198 intersection.

**Map of Prime Market Study**




### 2. Population

The 10-minute drive includes a 2007 population of 77,500, which grew at a rate of 7.9% from 2000-2007 and is projected to grow by 4.4% from 2007-2012. Median household income in 2007 is estimated at $80,792. Average drive time to work is 39 minutes. Homeowners make up 72.9% of households; 79% of dwelling units are single-family (half the total are detached units).

Exhibit 2 provides detailed census-based information on populations within the 5-, 10- and 15-minute drives from Burtonsville.

## 3. The Burtonsville Commercial District

Burtonsville's commercial district comprises two shopping centers and a neighborhood shopping area along Old Columbia Pike (Route 198). The total retail square footage is approximately 320,000, putting the commercial area taken as a whole into the range of a "super community center" (250,000 sf and higher, according to the Urban Land Institute, Dollars and Cents of Shopping Centers, 2004).

Burtonsville Shopping Center (currently 49,400 sf, with plans to expand to 150,000 sf) features a Dutch Country Farmers Market (open Thursday through Saturday), a CVS Pharmacy, a US Post Office and smaller retailers (County liquor store, shoe repair shop, ice cream/donut store). The one vacant space, formerly occupied by a bank, indicates overall occupancy of 90-95%. The developer is not recruiting tenants, however, as plans proceed for redevelopment. While the Dutch Market will not be part of the new center it is expected to include a major grocery store.

Burtonsville Crossing (129,700 sf) has a Giant supermarket anchor and a range of neighborhood retailers (hair salon, mail center, liquor store, bank, dry cleaners, video rental, etc.). Rents in this center (going forward) are in the range of $32-35 (plus $6 common area maintenance charge) and occupancy is approximately 95%.

The neighborhood shopping area along Route 198 west of Route 29 is an assortment of small businesses in Pike Center, Old Columbia Center, the Shops at Burtonsville and free-standing stores, many of them residences converted to commercial use, along the south side of Route 198. These include:

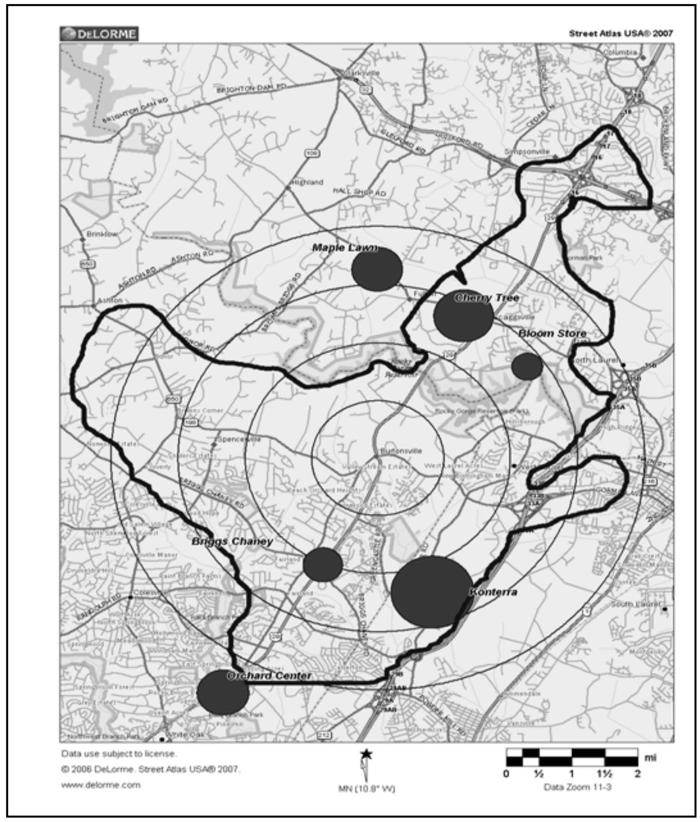
- A variety of restaurants, both sit-down (Cuba de Ayer, Seibels, Old Hickory Grill, Maiwand Kabob, Chapalas) and fast-food/delivery/take-out (Domino's, Papa Johns, Jerry's Pizza and Subs, Subway, Chicken Basket, Hunan Manor).
- Auto-related: car rental, auto service, gasoline/convenience.
- Personal services: beauty salon, dry cleaners, nail care.
- Hardware, furnishings, decorations (bedding, carpeting).
- Specialty food market.
- Liquor store.

***Burtonsville Commercial Area***

These centers are nearly full (occupancy is approximately 90-95%). Rents are in the range of $15-25 per square foot (gross) depending on size, location and date of lease.

## 4. Competitive Locations

The competitive area includes:




- Briggs-Chaney Market Place: 192,000 sf anchored by Safeway and Ross Dress for Less.
- Orchard Center, Cherry Hill Road: 425,000 sf including Super Fresh and Target.
- Cherry Tree Crossing, Scaggsville: c. 40,000 sf, a two-level center.
- Bloom Supermarket and retail center, North Laurel: c. 70,000 sf.
- Maple Lawn, Scaggsville: currently 40,000 sf to grow to 180,000 sf and to include Harris-Teeter Supermarket. The project is a "town center" that will include 1,340 housing units and 1.6 million square feet of non-retail commercial space. Projected build out is 10-12 years. The retail mix includes two large restaurants, quick service food and a coffee shop.
- Konterra, Laurel, is a new regional town center now under construction three miles southeast of Burtonsville. The development program for Konterra East includes: retail (1.5 million square feet), office (3.8 million sf), residential (4,500 dwelling units) and hotel (600 rooms). Konterra West is an additional 253 acres, zoned C-R-C ("upscale commercial retail center," according to the web site).

In summary there is now roughly 0.8-1.0 million square feet (msf) of retail space in the PMA and an additional 1.5-2.0 msf under construction, planned or approved.

## 5. Traffic

Large volumes of traffic support businesses in Burtonsville. Exhibit 1 provides estimates of average annual daily traffic for locations in the Burtonsville area. The figures allow for comparison among stations and by year, from 2001-2006

Exhibit 1

**Traffic Counts, Selected Locations, Burtonsville Area, Maryland 2001-2006**

| | *Average Annual Daily Traffic* | | | | | | |
|---|---|---|---|---|---|---|---|
| ***Location*** | **2006** | **2005** | **2004** | **2003** | **2002** | **2001** | **Change 2001-2006** |
| Route 29 | | | | | | | |
| South of 198 | | | | | | | |
| Burtonsville | 51,532 | 52,050 | 53,075 | 53,525 | 52,950 | 51,375 | 0.3% |
| Fairland | 54,231 | 54,775 | 57,575 | 57,475 | 52,375 | 55,575 | -2.4% |
| Route 29A | 14,350 | - | - | - | - | - | - |
| Route 198 | | | | | | | |
| East of Route 29 | 42,620 | 38,675 | 41,425 | 40,950 | 40,475 | 46,900 | -9.1% |
| Between Rte 29 and 29A | 38,291 | - | - | - | - | - | - |
| West of Route 29 | | | | | | | |
| Burtonsville | 32,251 | 32,575 | 28,325 | 28,050 | 27,675 | 30,025 | 7.4% |
| Spencerville | 25,421 | 25,675 | 19,625 | 19,450 | 19,175 | 18,025 | 41.0% |

Source: Maryland Dept. of Transportation, State Highway Administration; Thomas Point Associates, Inc.

Based on these traffic counts, we note the following:

- Route 29 is the most heavily traveled road in the immediate area of Burtonsville, (For perspective, the most heavily traveled road in the Washington-Baltimore region, the Capitol Beltway [I-495] near New Hampshire Avenue had an AADT in 2006 of 200,430 vehicles, nearly four times the traffic on Route 29).

- Traffic volumes have been steady on Route 29 in recent years. The slight difference in traffic in Fairland, south of Burtonsville, and Burtonsville suggests that most traffic originates to the north. This is not surprising since Columbia, north of Burtonsville, is a major regional population center.

- Route 198 is an important east-west road. While just a four-lane local road in Burtonsville west of Route 29, it carried over 62% of the traffic volume of Route 29. It is more heavily traveled east of Route 29 than west: 2006 vehicle counts were 32% greater on the east side of Route 29 than on the west. However, the fastest growing segment of the local road system has been on Route 198 west of Burtonsville. The stretch of Route 198 Spencerville grew by over 7,000 vehicles, or 41%, from 2001-2006.

- The realignment of Route 29 has had little impact on traffic on Route 198. Counts west of Route 29, in the heart of Burtonsville, were higher in 2006 than in 2001 (by 7.4%); while counts declined slightly from 2005 to 2006, they increased over the longer period.

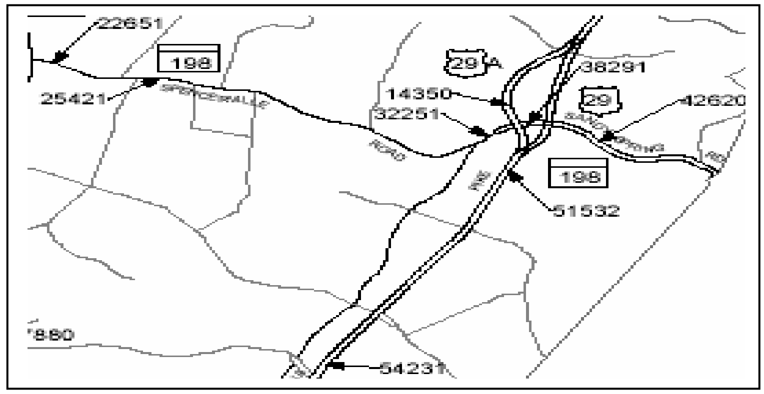



***Figure 3***
***Locations of Traffic Counts, 2006,***
***Burtonsville Area***

## Retail Sales and Opportunities

A key fact about the Burtonsville PMA is that there is significant "outflow" of retail sales, meaning that shoppers are going elsewhere to purchase needed goods and services.

- Exhibit A-2 summarizes existing retail sales and opportunities. The data show a significant retail opportunity for additional sales amounting to $802 million. This potential ($802 million) reflects demand across all retail categories except automotive and hardware. The figures do not take into account the new activity at Maple Lawn and the Bloom-anchored center in North Laurel. The $802 million represents the difference between actual sales and estimated demand based on household expenditure patterns in the area. The figure indicates demand for roughly 1.8-2.0 million square feet of additional retail space in this market area (at sales per square foot of $400-450).

- Most of this retail gap will be filled by new and proposed development, particularly the retail component of the Konterra project (1.5 million sf).

With respect to Burtonsville's commercial area the sales gap is a positive factor although it is difficult to translate the opportunity into changes in the commercial district.

- The market area is downsizing quickly as a result of new retail developments to the north and east. Existing stores will face much stronger competition.

- The new alignment of Route 29 and changes in the circulation pattern limit future retail growth for Burtonsville.

- There is no undeveloped land in the Burtonsville commercial area with appropriate zoning for additional commercial development.

- The Amish Market is a regional destination and has become integral to the cultural, business and community image of Burtonsville. If the Amish Market is lost, that may weaken Burtonsville as a regional destination although some of the businesses, particularly the restaurants, still have a regional clientele.

## Summary and Recommendations

Burtonsville is a good location in a strong but rapidly changing market area. In the past the market area has been a ten-minute drive but it is starting to contract in the north, east and south as a result of new commercial development. Large developments on the horizon will bring changes to the commercial environment. The leading problems associated with the commercial environment in Burtonsville are a lack of space and a wave of competition.

- The constraints on bringing in new retail development are apparent. There is limited development capacity due to constraints on land, circulation, zoning, storm water management and public opposition. The County lacks site control and there are no new/proposed projects suitable for public-private partnerships.

- The redesign of Route 29 capped Burtonsville's commercial growth and suggests greater potential for specialized/destination retail combined with neighborhood shopping. Burtonsville can accommodate restaurants and specialty stores that do not require a mall location.

- In this situation the County-to the extent that there is space-should promote Burtonsville to small businesses that do not require mall destinations, including:

    - More and better restaurants.
    - Salons, health spas and services.
    - Furnishings, decorations.
    - Specialty personal supplies and services.
    - Gifts, novelties.

The pressures for improvements to Route 198 are strong and increasing as traffic on 198 in Burtonsville and Spencerville has grown significantly.

State planning for Route 198 is closely related to the County's planning for the proposed "Burtonsville access road" (also called the "ring road"). If the County builds the ring road first, then the State will probably want to eliminate access points to commercial properties from Route 198. The alternative, without the ring road, is to redesign Route 198 as something more like a "main street" appearance than a primary state route. . There are many examples of high-traffic roads that function for better or worse as "main streets" and there is increasing experience in Maryland and around the nation in ways to redevelop in these situations.

- It is not clear from the traffic figures how the proposed ring road will address the issues and improve the situation. The Burtonsville Access Road Prospectus (2002) states:

> *"Travel demand forecasts indicate that in the future, under the "no-build" conditions, traffic volumes on Md. 198 will increase by more than 50% of the current volumes, which could be somewhat alleviated by the Burtonsville Access Road…The provision of this road would ultimately allow Burtonsville to transition into a town center and satisfy the needs of the residential and business communities."* (Source: ***Prospectus***, page 1-8)
>
> The traffic analysis in the Prospectus (Appendix A) indicates that ring road traffic will be roughly 10% of Route 198 traffic (estimated for year 2025, Average Annual Daily Traffic [AADT] on 198 is projected at 37,700 vehicles; for the ring road, AADT in that year is estimated at only 3,800). (Source: ***Prospectus***, Appendix A-5)

The use of the term "Town Center" or "town center" has been a confusing piece in the public discussions in Burtonsville. Some have been talking about a retail place while others are discussing a public or cultural center. Residents interviewed in the consumer phone survey express their "need for more and better stores." The responses of business leaders (March 7, 2007) reflect confusion on this point. It is important that someone explain the concept of the Town Center and develop consensus on what the term means and in what ways it could apply. This would lead to a discussion of what is possible in Burtonsville given constraints on land and public investment.

- The "retail" Town Center concept (in the style of Bowie, for example) is not viable. It would have required an area planning approach with coordination between redevelopment of Burtonsville Shopping Center and commercial areas to the west, new patterns of circulation (streets, sidewalks, bikeways) and a district parking approach possibly including a parking structure.

- There is still the potential to have a public place/town center (with some of the components of a Reston-style town center, aside from the density):

    - Improvements in landscaping, circulation, pedestrian safety.
    - Location of community facilities.
    - Meeting and/or performance space.

- A smart recommendation is to classify this area, for future planning and redevelopment, as its own distinctive "retail village," and avoid broader and unrealistic terms as a Town Center. A retail village concept fits comfortably with the community planning notion of shopping that is convenient for nearby neighborhoods and perpetuates Burtonsville as the principal and historic place at an accessible crossroads designation. At the same time, the Burtonsville community will benefit from the expanding regional shopping opportunities within a reasonable distance. These regional shopping centers may be a traffic magnet requiring altered and/or increased traffic handling considerations at levels higher than could be accommodated on Burtonsville's local roads.

There are some specific tools that the County can use although most work best when there is agreement on a central concept for the area:

- Shared parking: where there is market demand, nothing supports retail development and enhancement better than parking.
- Development of a central public space: Place-making is essential to foster the unique identity of Burtonsville surrounded by established, emerging and larger mixed-use projects, such as Konterra, Laurel, Maple Lawn, Columbia, and Orchard Center.
- Streetscaping.
- Landscaping.
- Storm water drainage improvements.
- Pedestrian and bikeway improvements.
- Signage – including directional and promotional.
- Design assistance and coordination.
- Financial support for targeted businesses to stay and grow.

Park and Planning staff is working on a “simplified development procedure” for Burtonsville’s small property owners so that they won’t have to go through the expensive and complex subdivision process (although the procedure will probably have a property size limit of c. ½ acre, thereby excluding the one owner who has assembled a group of properties).

It is clear that the ring road with its limited street parking will not in itself divert shoppers and residents from driving on Route 198 nor is it a phase in a larger program that will “allow Burtonsville to transition into a town center.” However, plans for the ring road seem to be moving forward. There is a need to evaluate the impact and cost-benefit of this road and to better integrate its design in terms of parking and place-making while considering alternatives.

There is still room for limited retail expansion in Burtonsville. The challenge will be to get more from less in terms of tenants that pay higher rents, goods and services that the community wants and stores that make the area stand out in a market area with a growing variety of competitive locations. In this situation the “retail village” may be a better model than the “town center.”

# Demographic Overview

**Exhibit 2**

**Demographic Report: 2007 Population by Drive Time from Burtonsville, Md.***

| | *Population By Drive Time* | | | | | |
|---|---|---|---|---|---|---|
| | **5 Minutes** | | **10 Minutes** | | **15 Minutes** | |
| **Description** | *No.* | *%* | *No.* | *%* | *No.* | *%* |
| **Population** | | | | | | |
| 2012 Projection | 9,608 | | 80,983 | | 299,241 | |
| 2007 Estimate | 9,433 | | 77,541 | | 288,112 | |
| 2000 Census | 9,199 | | 71,834 | | 270,199 | |
| 1990 Census | 8,274 | | 65,942 | | 238,321 | |
| Growth 2007-2012 | 1.86% | | 4.44% | | 3.86% | |
| Growth 2000-2007 | 2.54% | | 7.94% | | 6.63% | |
| Growth 1990-2000 | 11.18% | | 8.94% | | 13.38% | |
| **2007 Est. Population by Single Race Classification** | 9,433 | | 77,541 | | 288,112 | |
| White Alone | 4,116 | 43.6 | 36,433 | 47.0 | 139,765 | 48.5 |
| Black or African American Alone | 3,134 | 33.2 | 25,080 | 32.3 | 89,302 | 31.0 |
| American Indian and Alaska Native Alone | 15 | 0.2 | 215 | 0.3 | 846 | 0.3 |
| Asian Alone | 1,695 | 18.0 | 10,867 | 14.0 | 35,499 | 12.3 |
| Native Hawaiian and Other Pacific Islander Alone | 4 | 0.0 | 76 | 0.1 | 251 | 0.1 |
| Some Other Race Alone | 168 | 1.8 | 2,042 | 2.6 | 11,412 | 4.0 |
| Two or More Races | 301 | 3.2 | 2,827 | 3.6 | 11,037 | 3.8 |
| **2007 Est. Population Hisp. or Latino by Origin*** | 9,433 | | 77,541 | | 288,112 | |
| Not Hispanic or Latino | 8,892 | 94.3 | 72,046 | 92.9 | 261,961 | 90.9 |
| Hispanic or Latino: | 541 | 5.7 | 5,495 | 7.1 | 26,151 | 9.1 |
| Mexican | 52 | 9.6 | 668 | 12.2 | 4,169 | 15.9 |
| Puerto Rican | 78 | 14.4 | 794 | 14.4 | 3,247 | 12.4 |
| Cuban | 29 | 5.4 | 215 | 3.9 | 920 | 3.5 |
| All Other Hispanic or Latino | 382 | 70.6 | 3,818 | 69.5 | 17,815 | 68.1 |
| **2007 Est. Pop. Asian Alone Race by Category*** | 1,695 | | 10,867 | | 35,499 | |
| Chinese, except Taiwanese | 274 | 16.2 | 1,898 | 17.5 | 6,831 | 19.2 |
| Filipino | 60 | 3.5 | 582 | 5.4 | 2,166 | 6.1 |
| Asian Indian | 676 | 39.9 | 3,384 | 31.1 | 10,145 | 28.6 |
| Korean | 418 | 24.7 | 2,868 | 26.4 | 8,909 | 25.1 |
| **2007 Est. Population by Sex** | 9,433 | | 77,541 | | 288,112 | |
| Male | 4,455 | 47.2 | 37,066 | 47.8 | 139,259 | 48.3 |
| Female | 4,978 | 52.8 | 40,475 | 52.2 | 148,853 | 51.7 |
| Male/Female Ratio | 0.89 | | 0.92 | | 0.94 | |
| **2007 Est. Population by Age** | 9,433 | | 77,541 | | 288,112 | |
| Age 0 - 4 | 690 | 7.3 | 5,293 | 6.8 | 19,977 | 6.9 |
| Age 5 - 9 | 659 | 7.0 | 5,158 | 6.7 | 19,871 | 6.9 |
| Age 10 - 14 | 701 | 7.4 | 5,596 | 7.2 | 20,548 | 7.1 |
| Age 15 - 17 | 473 | 5.0 | 3,791 | 4.9 | 13,198 | 4.6 |

| | | | | | | |
|---|---|---|---|---|---|---|
| Age 18 - 20 | 339 | 3.6 | 2,776 | 3.6 | 9,792 | 3.4 |
| Age 21 - 24 | 460 | 4.9 | 3,956 | 5.1 | 14,359 | 5.0 |
| Age 25 - 34 | 1,010 | 10.7 | 9,405 | 12.1 | 38,382 | 13.3 |
| Age 35 - 44 | 1,649 | 17.5 | 12,179 | 15.7 | 46,642 | 16.2 |
| Age 45 - 49 | 863 | 9.1 | 6,773 | 8.7 | 23,723 | 8.2 |
| Age 50 - 54 | 722 | 7.7 | 5,991 | 7.7 | 21,235 | 7.4 |
| Age 55 - 59 | 597 | 6.3 | 5,147 | 6.6 | 18,278 | 6.3 |
| Age 60 - 64 | 441 | 4.7 | 3,877 | 5.0 | 13,885 | 4.8 |
| Age 65 - 74 | 475 | 5.0 | 4,595 | 5.9 | 16,241 | 5.6 |
| Age 75 - 84 | 243 | 2.6 | 2,197 | 2.8 | 8,538 | 3.0 |
| Age 85 and over | 110 | 1.2 | 806 | 1.0 | 3,444 | 1.2 |
| Age 16 and over | 7,226 | 76.6 | 60,238 | 77.7 | 223,288 | 77.5 |
| Age 18 and over | 6,910 | 73.3 | 57,703 | 74.4 | 214,518 | 74.5 |
| Age 21 and over | 6,570 | 69.6 | 54,926 | 70.8 | 204,726 | 71.1 |
| Age 65 and over | 828 | 8.8 | 7,599 | 9.8 | 28,224 | 9.8 |
| **2007 Est. Median Age** | 37 | | 37 | | 37 | |
| **2007 Est. Average Age** | 36.06 | | 36.66 | | 36.44 | |
| **2007 Est. Population Age 15+ by Marital Status*** | 7,383 | | 61,494 | | 227,717 | |
| Total, Never Married | 1,956 | 26.5 | 16,767 | 27.3 | 64,116 | 28.2 |
| Married, Spouse present | 4,112 | 55.7 | 34,150 | 55.5 | 121,167 | 53.2 |
| Married, Spouse absent | 386 | 5.2 | 2,890 | 4.7 | 12,311 | 5.4 |
| Widowed | 346 | 4.7 | 2,474 | 4.0 | 10,539 | 4.6 |
| Divorced | 582 | 7.9 | 5,213 | 8.5 | 19,583 | 8.6 |
| Males, Never Married | 909 | 12.3 | 8,255 | 13.4 | 32,588 | 14.3 |
| Previously Married | 309 | 4.2 | 2,843 | 4.6 | 11,382 | 5.0 |
| Females, Never Married | 1,047 | 14.2 | 8,512 | 13.8 | 31,528 | 13.8 |
| Previously Married | 780 | 10.6 | 6,409 | 10.4 | 24,838 | 10.9 |
| **2007 Est. Pop. Age 25+ by Educational Attainment*** | 6,110 | | 50,970 | | 190,367 | |
| Less than 9th grade | 125 | 2.0 | 1,258 | 2.5 | 6,083 | 3.2 |
| Some High School, no diploma | 356 | 5.8 | 2,540 | 5.0 | 10,856 | 5.7 |
| High School Graduate (or GED) | 1,135 | 18.6 | 9,516 | 18.7 | 34,371 | 18.1 |
| Some College, no degree | 1,216 | 19.9 | 10,554 | 20.7 | 38,358 | 20.1 |
| Associate Degree | 264 | 4.3 | 2,603 | 5.1 | 10,053 | 5.3 |
| Bachelor's Degree | 1,798 | 29.4 | 14,352 | 28.2 | 49,956 | 26.2 |
| Master's Degree | 773 | 12.7 | 6,905 | 13.5 | 26,804 | 14.1 |
| Professional School Degree | 225 | 3.7 | 1,742 | 3.4 | 7,192 | 3.8 |
| Doctorate Degree | 217 | 3.6 | 1,502 | 2.9 | 6,696 | 3.5 |
| **Households** | | | | | | |
| 2012 Projection | 3,365 | | 29,056 | | 110,509 | |
| 2007 Estimate | 3,322 | | 27,983 | | 106,793 | |
| 2000 Census | 3,266 | | 26,125 | | 100,749 | |
| 1990 Census | 3,035 | | 24,305 | | 89,760 | |
| Growth 2007-2012 | 1.29% | | 3.83% | | 3.48% | |
| Growth 2000-2007 | 1.71% | | 7.11% | | 6.00% | |
| Growth 1990-2000 | 7.61% | | 7.49% | | 12.24% | |
| **2007 Est. Households by Household Type** | 3,322 | | 27,983 | | 106,793 | |
| Family Households | 2,493 | 75.0 | 20,363 | 72.8 | 73,420 | 68.7 |

| | | | | | | |
|---|---|---|---|---|---|---|
| Nonfamily Households | 829 | 25.0 | 7,619 | 27.2 | 33,373 | 31.3 |
| **2007 Est. Households by Household Income** | 3,322 | | 27,983 | | 106,793 | |
| Income Less than $15,000 | 116 | 3.5 | 1,009 | 3.6 | 5,113 | 4.8 |
| Income $15,000 - $24,999 | 116 | 3.5 | 1,085 | 3.9 | 4,823 | 4.5 |
| Income $25,000 - $34,999 | 140 | 4.2 | 1,592 | 5.7 | 7,141 | 6.7 |
| Income $35,000 - $49,999 | 378 | 11.4 | 3,248 | 11.6 | 13,224 | 12.4 |
| Income $50,000 - $74,999 | 651 | 19.6 | 5,970 | 21.3 | 21,857 | 20.5 |
| Income $75,000 - $99,999 | 695 | 20.9 | 4,695 | 16.8 | 17,413 | 16.3 |
| Income $100,000 - $149,999 | 808 | 24.3 | 6,039 | 21.6 | 21,706 | 20.3 |
| Income $150,000 - $249,999 | 340 | 10.2 | 3,482 | 12.4 | 12,223 | 11.4 |
| Income $250,000 - $499,999 | 63 | 1.9 | 697 | 2.5 | 2,587 | 2.4 |
| Income $500,000 and more | 15 | 0.5 | 166 | 0.6 | 706 | 0.7 |
| **2007 Est. Average Household Income** | $96,100 | | $98,450 | | $95,008 | |
| **2007 Est. Median Household Income** | $84,357 | | $80,792 | | $76,779 | |
| **2007 Est. Per Capita Income** | 34,166 | | 35,793 | | 35,528 | |
| **2007 Est. Avge. Household Size** | 2.80 | | 2.75 | | 2.67 | |
| **2007 Est. Households by Presence of People*** | 3,322 | | 27,983 | | 106,793 | |
| **2007 Est. Average Number of Vehicles*** | 1.92 | | 1.93 | | 1.82 | |
| **2007 Est. Pop Age 16+ by Employment Status*** | 7,226 | | 60,238 | | 223,288 | |
| In Armed Forces | 26 | 0.4 | 235 | 0.4 | 1,418 | 0.6 |
| Civilian - Employed | 5,313 | 73.5 | 44,272 | 73.5 | 160,427 | 71.8 |
| Civilian - Unemployed | 122 | 1.7 | 1,183 | 2.0 | 4,836 | 2.2 |
| Not in Labor Force | 1,765 | 24.4 | 14,548 | 24.2 | 56,607 | 25.4 |
| **2007 Est. Civ Employed Pop 16+ by Occupation*** | 5,313 | | 44,272 | | 160,427 | |
| Management, Business, and Financial Operations | 1,107 | 20.8 | 8,824 | 19.9 | 30,935 | 19.3 |
| Professional and Related Occupations | 1,991 | 37.5 | 14,773 | 33.4 | 53,631 | 33.4 |
| Service | 555 | 10.4 | 4,763 | 10.8 | 17,688 | 11.0 |
| Sales and Office | 1,117 | 21.0 | 10,970 | 24.8 | 39,612 | 24.7 |
| Farming, Fishing, and Forestry | 7 | 0.1 | 80 | 0.2 | 179 | 0.1 |
| Construction, Extraction and Maintainance | 326 | 6.1 | 2,315 | 5.2 | 9,165 | 5.7 |
| Production, Transportation and Material Moving | 209 | 3.9 | 2,547 | 5.8 | 9,217 | 5.7 |
| **2007 Est. Pop 16+ by Occupation** | 5,313 | | 44,272 | | 160,427 | |
| Blue Collar | 535 | 10.1 | 4,862 | 11.0 | 18,382 | 11.5 |
| White Collar | 4,210 | 79.2 | 34,540 | 78.0 | 124,114 | 77.4 |
| Service and Farm | 568 | 10.7 | 4,870 | 11.0 | 17,930 | 11.2 |
| **2007 Est. Average Travel Time to Work in Minutes*** | 38.28 | | 38.29 | | 36.00 | |
| **2007 Est. Tenure of Occupied Housing Units** | 3,322 | | 27,983 | | 106,793 | |
| Owner Occupied | 2,562 | 77.1 | 20,396 | 72.9 | 68,764 | 64.4 |
| Renter Occupied | 761 | 22.9 | 7,586 | 27.1 | 38,029 | 35.6 |

| | | | | | | |
|---|---|---|---|---|---|---|
| **2007 Occ Housing Units, Avg Length of Residence** | 10 | | 10 | | 9 | |
| **2007 Est. All Owner-Occupied Housing Values** | 2,562 | | 20,396 | | 68,764 | |
| Value Less than $20,000 | 0 | 0.0 | 4 | 0.0 | 158 | 0.2 |
| Value $20,000 - $39,999 | 11 | 0.4 | 69 | 0.3 | 258 | 0.4 |
| Value $40,000 - $59,999 | 13 | 0.5 | 105 | 0.5 | 235 | 0.3 |
| Value $60,000 - $79,999 | 3 | 0.1 | 55 | 0.3 | 245 | 0.4 |
| Value $80,000 - $99,999 | 0 | 0.0 | 55 | 0.3 | 346 | 0.5 |
| Value $100,000 - $149,999 | 0 | 0.0 | 138 | 0.7 | 1,462 | 2.1 |
| Value $150,000 - $199,999 | 24 | 0.9 | 822 | 4.0 | 3,527 | 5.1 |
| Value $200,000 - $299,999 | 767 | 29.9 | 5,266 | 25.8 | 16,720 | 24.3 |
| Value $300,000 - $399,999 | 843 | 32.9 | 5,414 | 26.5 | 17,654 | 25.7 |
| Value $400,000 - $499,999 | 432 | 16.9 | 3,516 | 17.2 | 10,921 | 15.9 |
| Value $500,000 - $749,999 | 340 | 13.3 | 3,739 | 18.3 | 12,199 | 17.7 |
| Value $750,000 - $999,999 | 71 | 2.8 | 750 | 3.7 | 3,580 | 5.2 |
| Value $1,000,000 or more | 59 | 2.3 | 462 | 2.3 | 1,460 | 2.1 |
| **2007 Est. Median All Owner-Occupied Housing** | $354,976 | | $368,033 | | $364,752 | |
| **2007 Est. Housing Units by Units in Structure*** | 3,395 | | 28,757 | | 110,575 | |
| 1 Unit Attached | 1,299 | 38.3 | 7,760 | 27.0 | 23,699 | 21.4 |
| 1 Unit Detached | 1,592 | 46.9 | 14,912 | 51.9 | 51,156 | 46.3 |
| 2 Units | 2 | 0.1 | 101 | 0.4 | 457 | 0.4 |
| 3 to 19 Units | 447 | 13.2 | 4,913 | 17.1 | 26,200 | 23.7 |
| 20 to 49 Units | 7 | 0.2 | 320 | 1.1 | 2,076 | 1.9 |
| 50 or More Units | 37 | 1.1 | 714 | 2.5 | 6,313 | 5.7 |
| Mobile Home or Trailer | 11 | 0.3 | 34 | 0.1 | 652 | 0.6 |
| Boat, RV, Van, etc. | 0 | 0.0 | 3 | 0.0 | 22 | 0.0 |

Source: Claritas, Inc.; Thomas Point Associates, Inc.

*By distance from intersection of Route 198 and Route 29A.

Exhibit 3

**Retail Sales Potentials, Selected Stores, Burtonsville Area**

| | ***10-minute Drive*** | | |
|---|---|---|---|
| | **Demand (Spending)** | **Supply (Sales)** | **Opportunity Gap/Surplus** |
| Total Retail Sales Incl Eating and Drinking Places | 1,453,193,210 | 650,788,960 | 802,404,250 |
| | | | |
| Motor Vehicle and Parts Dealers-441 | 265,567,033 | 306,187,413 | (40,620,380) |
| Automotive Dealers-4411 | 227,603,786 | 279,068,490 | (51,464,704) |
| Other Motor Vehicle Dealers-4412 | 17,367,535 | 1,414,035 | 15,953,500 |
| Automotive Parts/Accsrs, Tire Stores-4413 | 20,595,711 | 25,704,888 | (5,109,177) |
| | | | |
| Furniture and Home Furnishings Stores-442 | 45,414,103 | 12,597,763 | 32,816,340 |
| Furniture Stores-4421 | 24,233,374 | 7,825,049 | 16,408,325 |
| Home Furnishing Stores-4422 | 21,180,729 | 4,772,714 | 16,408,015 |
| | | | |
| Electronics and Appliance Stores-443 | 37,570,767 | 9,136,617 | 28,434,150 |
| Appliances, TVs, Electronics Stores-44311 | 28,277,861 | 6,500,835 | 21,777,026 |
| Household Appliances Stores-443111 | 6,126,224 | 507,374 | 5,618,850 |
| Radio, Television, Electronics Stores-443112 | 22,151,638 | 5,993,461 | 16,158,177 |
| Computer and Software Stores-44312 | 7,712,478 | 2,434,085 | 5,278,393 |
| Camera and Photographic Equipment Stores-44313 | 1,580,428 | 201,697 | 1,378,731 |
| | | | |
| Building Material, Garden Equip Stores -444 | 174,040,932 | 61,474,931 | 112,566,001 |
| Building Material and Supply Dealers-4441 | 158,101,007 | 57,259,253 | 100,841,754 |
| Home Centers-44411 | 59,696,965 | 14,622,401 | 45,074,564 |
| Paint and Wallpaper Stores-44412 | 4,417,561 | 0 | 4,417,561 |
| Hardware Stores-44413 | 12,014,448 | 15,679,879 | (3,665,431) |
| Other Building Materials Dealers-44419 | 81,972,033 | 26,956,973 | 55,015,060 |
| Building Materials, Lumberyards-444191 | 28,298,637 | 9,192,631 | 19,106,006 |
| Lawn, Garden Equipment, Supplies Stores-4442 | 15,939,925 | 4,215,678 | 11,724,247 |
| Outdoor Power Equipment Stores-44421 | 2,310,029 | 151,237 | 2,158,792 |
| Nursery and Garden Centers-44422 | 13,629,896 | 4,064,441 | 9,565,455 |
| | | | |
| Food and Beverage Stores-445 | 154,060,629 | 61,772,684 | 92,287,945 |
| Grocery Stores-4451 | 138,640,663 | 57,485,904 | 81,154,759 |
| Supermarkets, Grocery (Ex Conv) Stores-44511 | 132,170,336 | 55,075,331 | 77,095,005 |
| Convenience Stores-44512 | 6,470,327 | 2,410,573 | 4,059,754 |
| Specialty Food Stores-4452 | 4,877,591 | 1,136,016 | 3,741,575 |
| Beer, Wine and Liquor Stores-4453 | 10,542,375 | 3,150,765 | 7,391,610 |
| | | | |
| Health and Personal Care Stores-446 | 70,352,600 | 11,518,379 | 58,834,221 |
| Pharmancies and Drug Stores-44611 | 60,583,650 | 8,944,392 | 51,639,258 |
| Cosmetics, Beauty Supplies, Perfume Stores-44612 | 2,494,385 | 626,754 | 1,867,631 |
| Optical Goods Stores-44613 | 2,819,571 | 1,549,352 | 1,270,219 |
| Other Health and Personal Care Stores-44619 | 4,454,994 | 397,881 | 4,057,113 |
| | | | |
| Gasoline Stations-447 | 140,087,217 | 59,041,988 | 81,045,229 |
| Gasoline Stations With Conv Stores-44711 | 103,767,139 | 38,478,174 | 65,288,965 |
| Other Gasoline Stations-44719 | 36,320,078 | 20,563,814 | 15,756,264 |

| | | | |
|---|---|---|---|
| Clothing and Clothing Accessories Stores-448 | 81,131,861 | 18,480,823 | 62,651,038 |
| Clothing Stores-4481 | 56,556,319 | 11,947,123 | 44,609,196 |
| Men's Clothing Stores-44811 | 3,380,859 | 1,275,549 | 2,105,310 |
| Women's Clothing Stores-44812 | 15,196,162 | 4,421,954 | 10,774,208 |
| Childrens, Infants Clothing Stores-44813 | 2,892,572 | 190,896 | 2,701,676 |
| Family Clothing Stores-44814 | 29,741,016 | 4,877,516 | 24,863,500 |
| Clothing Accessories Stores-44815 | 1,502,948 | 27,681 | 1,475,267 |
| Other Clothing Stores-44819 | 3,842,762 | 1,153,527 | 2,689,235 |
| Shoe Stores-4482 | 10,511,401 | 1,959,683 | 8,551,718 |
| Jewelry, Luggage, Leather Goods Stores-4483 | 14,064,142 | 4,574,017 | 9,490,125 |
| Jewelry Stores-44831 | 13,063,686 | 4,574,017 | 8,489,669 |
| Luggage and Leather Goods Stores-44832 | 1,000,456 | 0 | 1,000,456 |
| | | | |
| Sporting Goods, Hobby, Book, Music Stores-451 | 30,023,907 | 4,852,751 | 25,171,156 |
| Sportng Goods, Hobby, Musical Inst Stores-4511 | 21,475,437 | 2,593,573 | 18,881,864 |
| Sporting Goods Stores-45111 | 11,372,570 | 1,371,447 | 10,001,123 |
| Hobby, Toys and Games Stores-45112 | 6,668,739 | 512,935 | 6,155,804 |
| Sew/Needlework/Piece Goods Stores-45113 | 1,510,338 | 19,901 | 1,490,437 |
| Musical Instrument and Supplies Stores-45114 | 1,923,790 | 689,291 | 1,234,499 |
| Book, Periodical and Music Stores-4512 | 8,548,470 | 2,259,178 | 6,289,292 |
| Book Stores and News Dealers-45121 | 5,939,817 | 1,994,525 | 3,945,292 |
| Book Stores-451211 | 5,647,960 | 1,991,554 | 3,656,406 |
| News Dealers and Newsstands-451212 | 291,856 | 2,971 | 288,885 |
| Prerecorded Tapes, CDs, Record Stores-45122 | 2,608,654 | 264,653 | 2,344,001 |
| | | | |
| General Merchandise Stores-452 | 179,397,641 | 20,087,135 | 159,310,506 |
| Department Stores Excl Leased Depts-4521 | 89,893,328 | 14,503,621 | 75,389,707 |
| Other General Merchandise Stores-4529 | 89,504,313 | 5,583,514 | 83,920,799 |
| Warehouse Clubs and Super Stores-45291 | 75,501,305 | 707,888 | 74,793,417 |
| All Other General Merchandise Stores-45299 | 14,003,008 | 4,875,626 | 9,127,382 |
| | | | |
| Miscellaneous Store Retailers-453 | 39,582,534 | 5,963,107 | 33,619,427 |
| Florists-4531 | 3,069,697 | 140,866 | 2,928,831 |
| Office Supplies, Stationery, Gift Stores-4532 | 16,056,897 | 2,417,963 | 13,638,934 |
| Office Supplies and Stationery Stores-45321 | 9,072,514 | 1,399,425 | 7,673,089 |
| Gift, Novelty and Souvenir Stores-45322 | 6,984,383 | 1,018,538 | 5,965,845 |
| Used Merchandise Stores-4533 | 3,646,938 | 964,475 | 2,682,463 |
| Other Miscellaneous Store Retailers-4539 | 16,809,002 | 2,439,803 | 14,369,199 |
| Non-Store Retailers-454 | 91,476,630 | 13,064,436 | 78,412,194 |
| Electronic Shopping, Mail-Order Houses-4541 | 69,523,850 | 0 | 69,523,850 |
| Vending Machine Operators-4542 | 3,515,496 | 2,817,749 | 697,747 |
| Direct Selling Establishments-4543 | 18,437,284 | 10,246,687 | 8,190,597 |
| | | | |
| Foodservice and Drinking Places-722 | 144,487,355 | 66,610,932 | 77,876,423 |
| Full-Service Restaurants-7221 | 65,694,540 | 30,449,266 | 35,245,274 |
| Limited-Service Eating Places-7222 | 60,805,775 | 28,812,516 | 31,993,259 |
| Special Foodservices-7223 | 11,690,263 | 6,690,911 | 4,999,352 |
| Drinking Places -Alcoholic Beverages-7224 | 6,296,777 | 658,239 | 5,638,538 |
| | | | |
| GAFO * | 389,595,176 | 67,573,052 | 322,022,124 |

| | | | |
|---|---|---|---|
| General Merchandise Stores-452 | 179,397,641 | 20,087,135 | 159,310,506 |
| Clothing and Clothing Accessories Stores-448 | 81,131,861 | 18,480,823 | 62,651,038 |
| Furniture and Home Furnishings Stores-442 | 45,414,103 | 12,597,763 | 32,816,340 |
| Electronics and Appliance Stores-443 | 37,570,767 | 9,136,617 | 28,434,150 |
| Sporting Goods, Hobby, Book, Music Stores-451 | 30,023,907 | 4,852,751 | 25,171,156 |
| Office Supplies, Stationery, Gift Stores-4532 | 16,056,897 | 2,417,963 | 13,638,934 |

Source: Claritas, Inc.; Thomas Point Associates, Inc.

Note: difference betw.demand and supply represents the opportunity gap or surplus available for each retail outlet in the specified area. When the demand is greater than (less than) the supply, there is an opportunity gap (surplus) for that retail outlet. For example, a positive value signifies an opportunity gap, while a negative value signifies a surplus.