COMMERCIAL CONSTRUCTION INDICATORS

Information on the number, location, structure type, and size of new development projects in 2024 in metropolitan Washington

September 2025

Metropolitan Washington
Council of Governments

COMMERCIAL CONSTRUCTION INDICATORS: 2024 DEVELOPMENT PROJECTS
September 23, 2025

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

CREDITS
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EXECUTIVE SUMMARY

This report describes recent trends in the commercial real estate market within the 24 member jurisdictions of the Metropolitan Washington Council of Governments (COG). Commercial property records from the CoStar subscription database for buildings completed through the end of 2024 were analyzed to document the number, size, and location of new commercial buildings, as well as describe changes in vacancy rates across the region.

- New construction increased seven percent from 2023 to 2024. In 2024, 136 new commercial buildings were completed, adding 14.9 million square feet of rentable space to the region.

- The overall regional vacancy rate was 11.3 percent at the end of 2024. While industrial, flex and stand-alone retail vacancies are low, the office vacancy rate has risen higher than any other year in the database, to 17.4 percent.

- The industrial/flex sector held the greatest share of commercial construction in 2024, creating 65 percent of the region's new space.

- About 17 percent of commercial space built in 2024 was within a High-Capacity Transit Station Area (HCT). These are locations around Metrorail, commuter rail, light rail, bus rapid transit, and streetcar stations that offer opportunities for optimizing connectivity and creating more transit-oriented communities.

- Overall, 43 percent of new space was located within one of the region's 145 Regional Activity Centers. This falls short of the 75 percent target for commercial construction set by the COG Board in the *Region Forward Vision*.

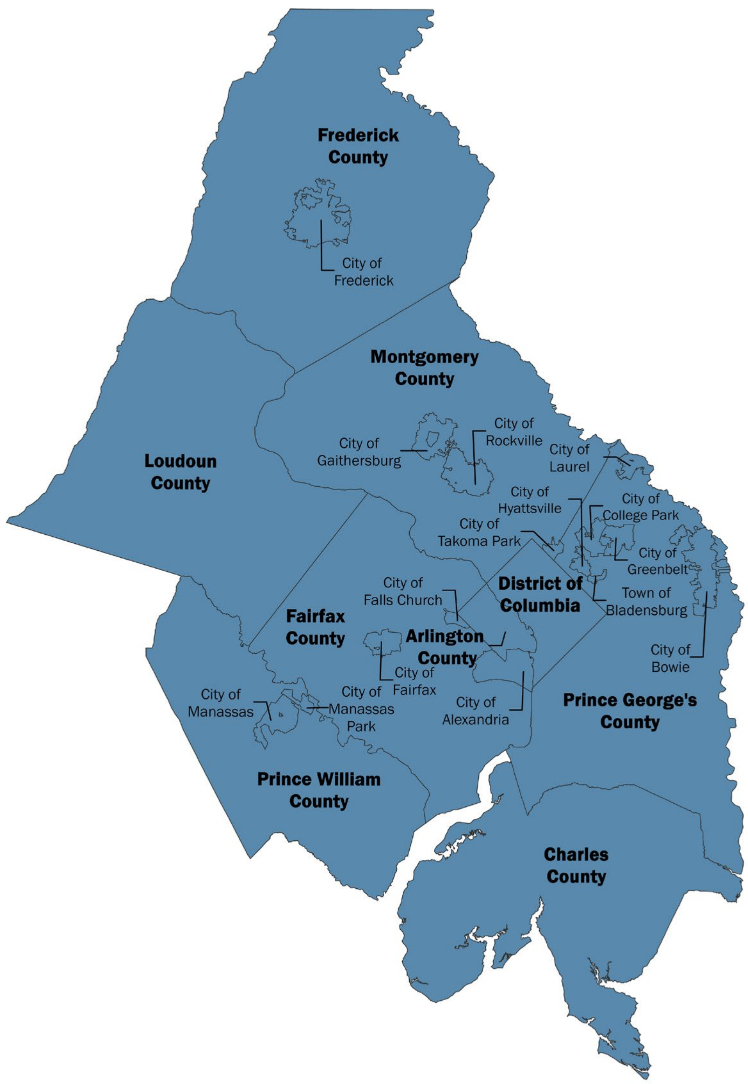
- With four new buildings—each a data center—and 1,303,493 square feet of new space in 2024, the Ashburn Station/Loudoun Gateway Regional Activity Center in Loudoun County was the fastest growing neighborhood in the region, accounting for about nine percent of all regional commercial growth.

INTRODUCTION

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

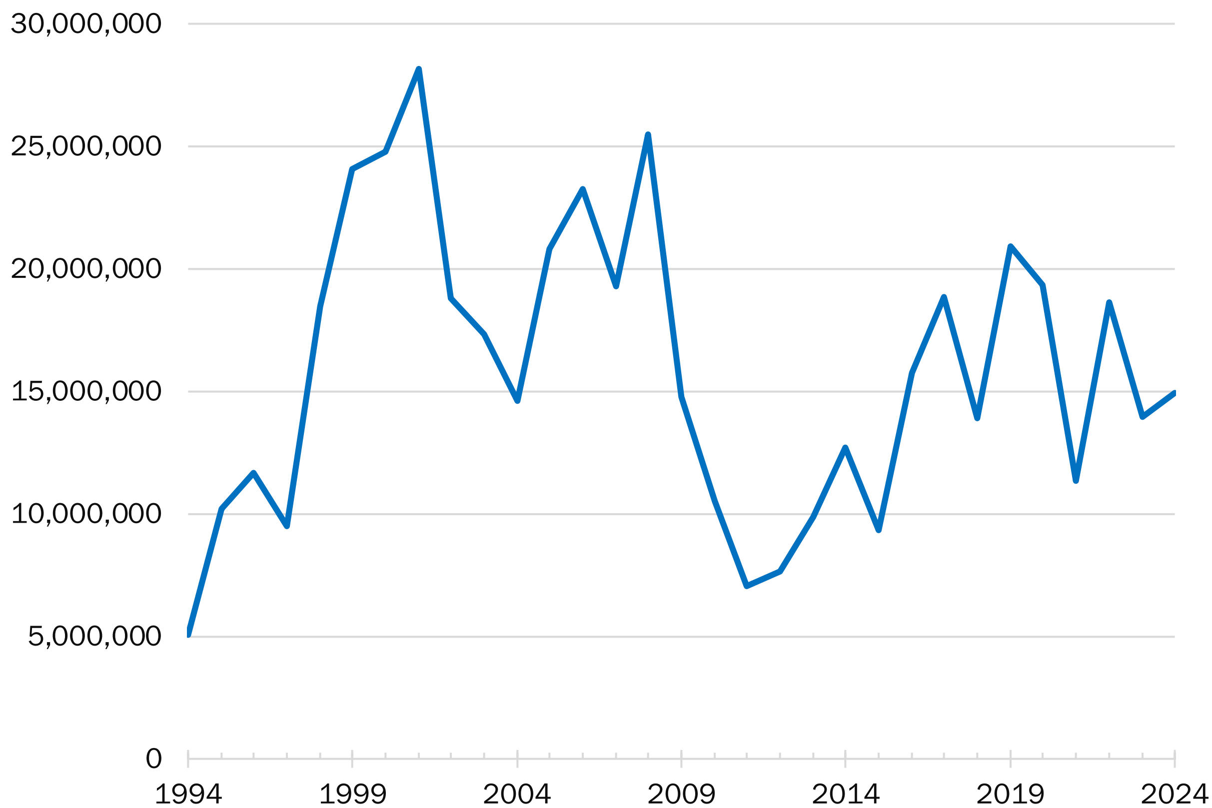
In this report, the metropolitan Washington region refers to the areas surrounding the District of Columbia that are members of COG, as shown below in Figure 1 below.

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



Commercial construction in the metropolitan Washington region increased by seven percent in 2024. Last year, 136 new commercial buildings were completed, with 14.9 million square feet of combined space, an increase of 955,089 square feet from 2023.

Figure 2. Square Footage of Completed Commercial Construction, 1994 - 2024



Source: CoStar, COG

The pace of new construction has fallen slightly from the pre-pandemic pace of construction and well below the strong pre-Great Recession market (Figure 2). However, the pace of construction in 2024 was higher than that during the early 2010s, when the region was battling the impacts of the Great Recession and federal budget sequestration.

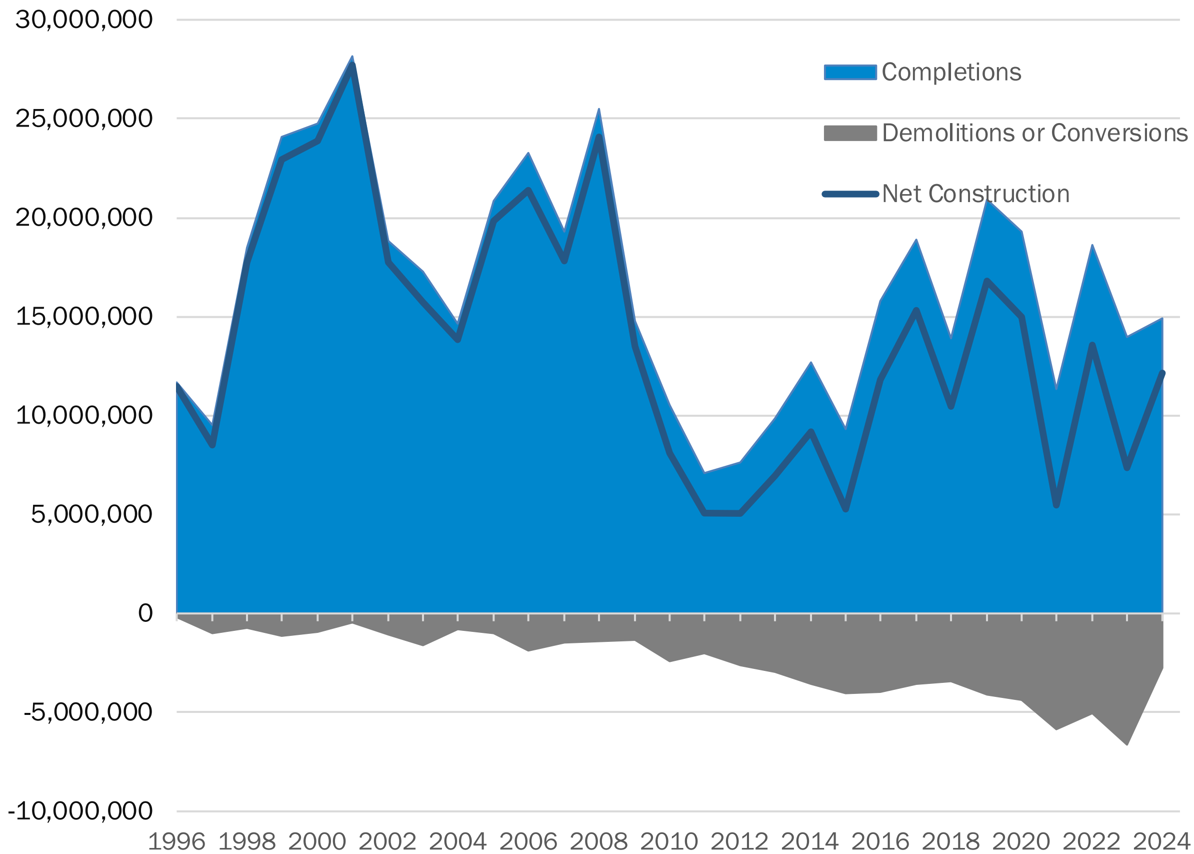
Office and retail construction have fallen sharply since the pandemic. New office space was added at the slowest pace since 1994, while 2024 saw the lowest total of new stand-alone retail space since the Second World War. This has impacted Central jurisdictions the most. Outer jurisdictions have had strong construction activity due to continued demand for flex and industrial buildings.

Flex and industrial construction—particularly in Outer Jurisdictions—has grown in the COG region, while office and retail construction has fallen to its lowest levels. Data centers are no longer concentrated in Loudoun County alone, and data centers are beginning to be built on the Maryland side of the Potomac River, as well

Over the past 15 years, the COG region has experienced an increase in the number of commercial properties being demolished or converted to new uses. The CoStar database lists about 24 million square feet of commercial space being either demolished or converted to a new use between the beginning of 2019 and the end of 2024. (Figure 3). Over half of this disused commercial space was in former office buildings. However, hotel properties were more likely to be converted to a new use than office buildings. While only 17 percent of the total abandoned space was in hospitality properties, hotels made up 54 percent of the space with plans for conversion.

Converted buildings are primarily becoming new multifamily properties, and hotels' design is better suited for such conversions than office buildings are. In 2024, there was a sharp decline in the number of demolitions or converted buildings. This may be attributable to a softening demand for new multifamily units.

Figure 3. Net Commercial Construction, 1996 - 2024



Source: CoStar

At the end of 2024, the overall regional vacancy rate for commercial space was 11.3 percent. Vacancy rates remain high compared to both current national trends and historical regional trends, particularly in the office sector. According to CoStar data, the Bay Area, Houston, Dallas, and Denver were the only major metropolitan areas with higher office vacancy rates than the DC area at the end of 2024.[1]

[1] United States Office National Report. CoStar, 2025.

The largest commercial project completed in 2024 was the single-story, 801,610 square foot, ELP DC Warehouse in Brandywine, Prince George's County. Six of the ten largest projects completed in 2024 were industrial buildings. Altogether, the region's ten largest projects, shown in Figure 4 below, make up 36 percent of the region's 14.9 million square feet of new commercial space.

Figure 4. Ten Largest Projects by Rentable Building Area in 2024

Project Name	Land Use	Street Address	Jurisdiction	Stories	RBA*
ELP DC Building 1 at Elion Logistics Park	Industrial (Warehouse)	14900 Elion Way, Brandywine, MD	Prince George's County	1	801,610
The Mather at Arbor Row	Health Care (Congregate Senior Housing)	7929 Westpark Dr, McLean, VA	Fairfax County	27	729,473
Placemakr Cathedral Heights	Hospitality	4000 Wisconsin Ave NW, Washington, DC	District of Columbia	6	697,573
5601 Manor Woods Rd	Industrial (Data Center)	5601 Manor Woods Rd, Frederick, MD	Frederick County	1	694,016
Yondr NOV1 Data Center	Industrial (Data Center)	24397 Racefield Ln, Aldie, VA	Loudoun County	2	669,358
Iron Mountain Virginia Data Center 3	Industrial (Data Center)	11640 Hayden Rd, Manassas, VA	Prince William County	2	390,000
Fuse at Mason Square	Office	3401 Fairfax Dr, Arlington, VA	Arlington County	10	345,000
17xM	Office	1700 M St NW, Washington, DC	District of Columbia	11	334,000
NVA04C Data Center	Industrial (Data Center)	22295 Lockridge Rd, Sterling, VA	Loudoun County	3	333,333
NVA04B Data Center	Industrial (Data Center)	22285 Lockridge Rd, Dulles, VA	Loudoun County	3	333,333

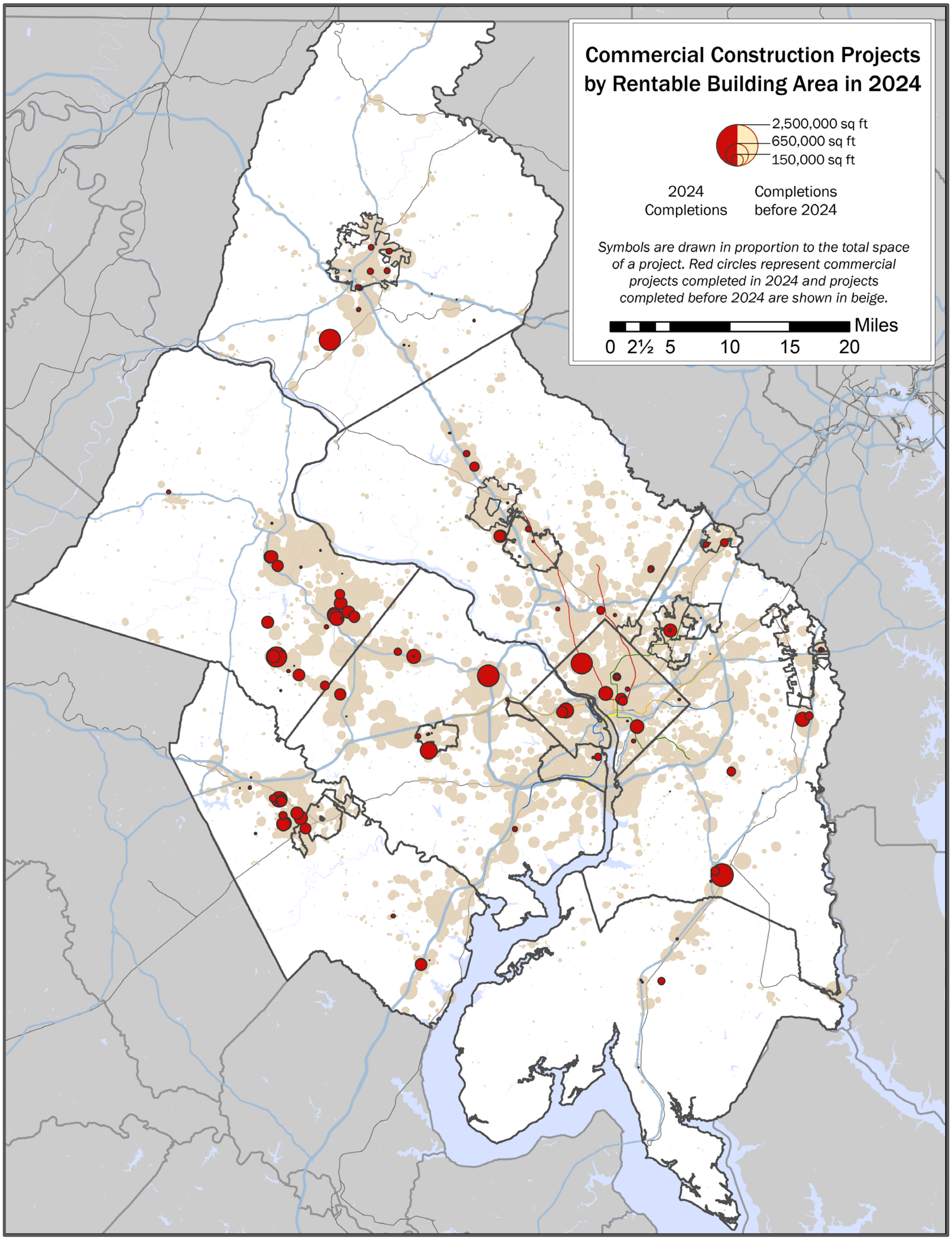
*RBA = rentable building area

Source: CoStar

Figure 5 on the following page maps the location of projects completed in 2024. Existing units are shown in beige; new construction, shown in red, is dispersed around the region, with all counties in the region receiving at least one project last year.

New properties located in the region's core were primarily office buildings or hotels, but with fewer being built than in recent years. Completed projects in both Inner and Outer suburban jurisdictions tended to be industrial or flex space buildings, with data centers usually in Virginia, and those related to warehousing and distribution in Maryland.

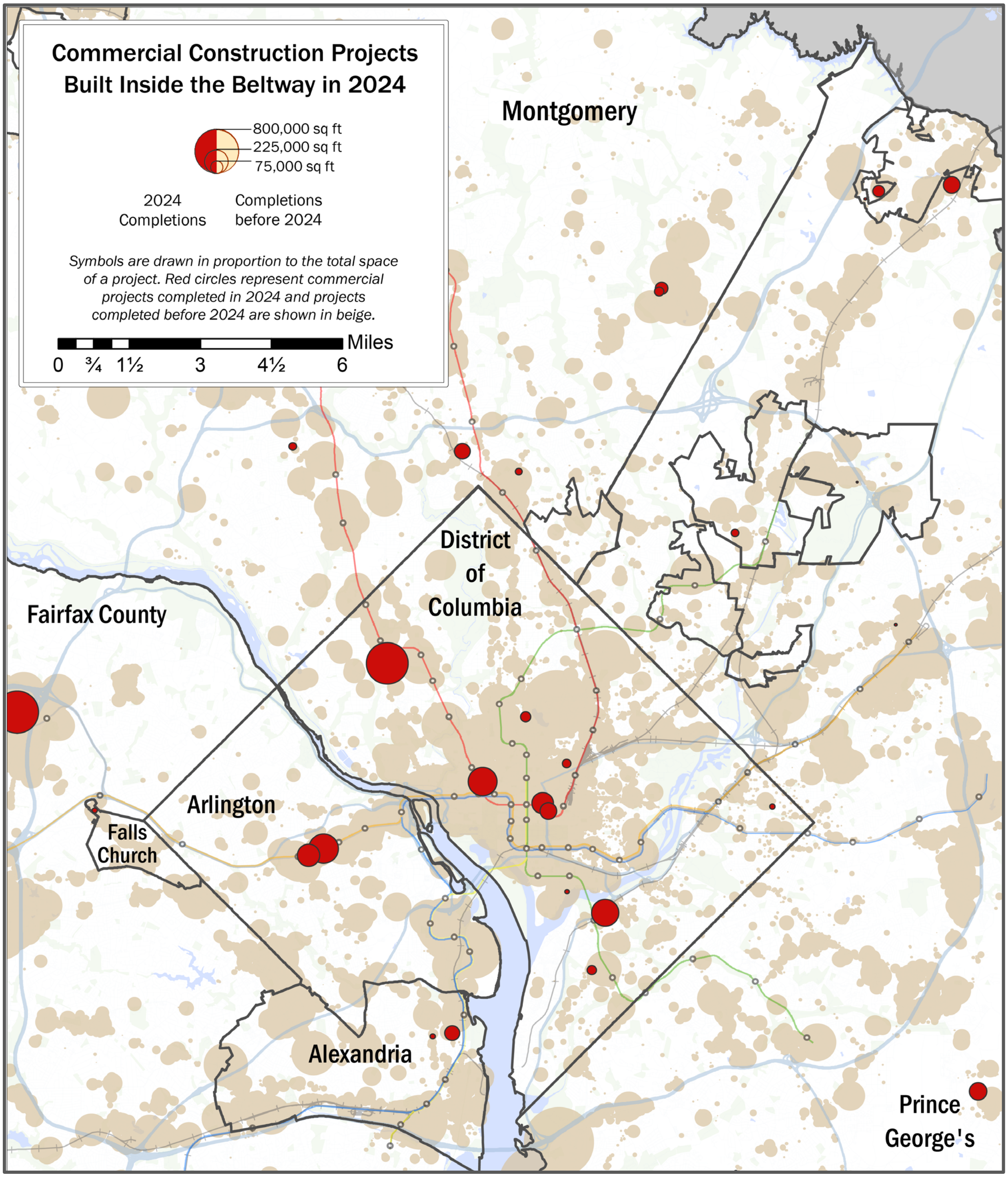
Figure 5



Source: CoStar

Figure 6 below shows construction within the Beltway. About 17 percent of regional construction in 2024 was located inside of I-495, which is well below the 43 percent share inside the Beltway for existing commercial space. About 61 percent of the 2.6 million square feet of space that was constructed inside the Beltway in 2024 was also within a half-mile walk of a Metrorail station, compared with only six percent for new construction outside of the Beltway.

Figure 6



Source: CoStar

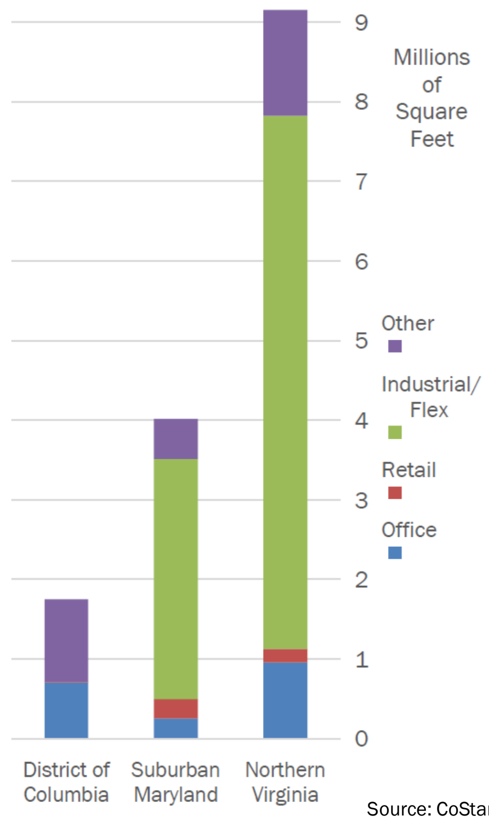
Commercial Construction by State

The District of Columbia added 10 new commercial buildings and 1.8 million square feet of space in 2024, primarily in offices and hotels (Figure 7). Construction in the District fell by 29 percent when compared to 2023 (Figure 8). The vacancy rate in the District of Columbia was 15.2 percent at the end of 2024.

In 2024, 54 new buildings and 4.0 million square feet of rentable space were added to suburban Maryland jurisdictions (Figure 7). In suburban Maryland, commercial construction declined by 15 percent from 2023 (Figure 8). At the end of 2024, the Maryland jurisdiction vacancy rate was 10.0 percent.

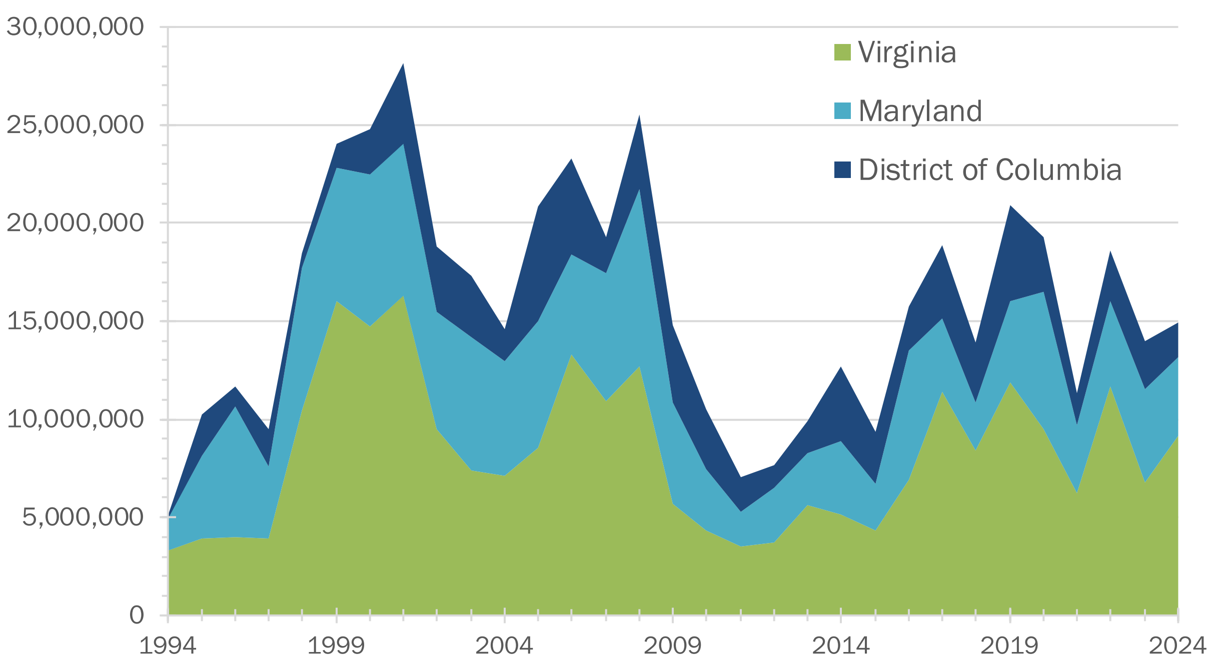
Northern Virginia jurisdictions added 72 new buildings and 9.2 million square feet of space in 2024, an increase of 35 percent from 2023. The Virginian COG jurisdictions have led the region in construction for 28 consecutive years. The Northern Virginia vacancy rate was 10.4 percent at the end of 2024.

Figure 7. 2024 Projects by Rentable Building Area



Source: CoStar

Figure 8. Square Footage of Completed Commercial Construction by State, 1994 - 2024



Note: This stacked area chart shows cumulative values.

Source: CoStar

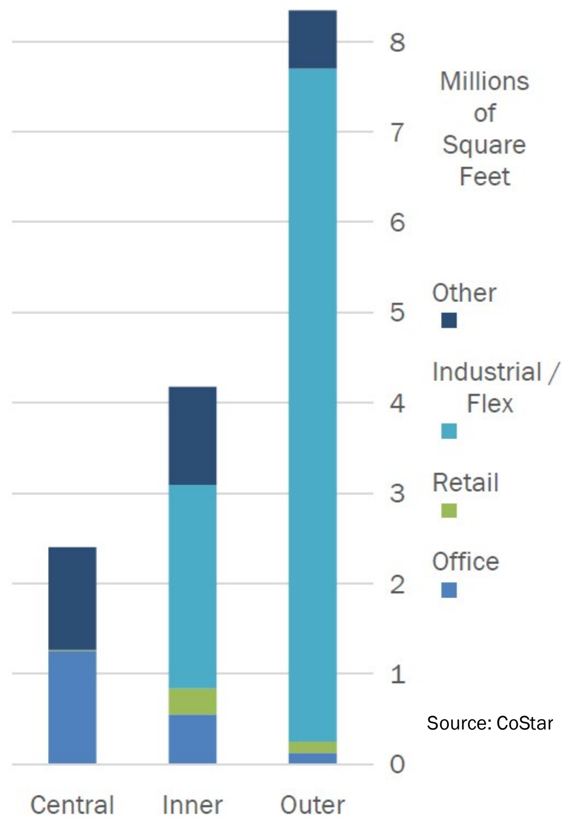
Commercial Construction by Regional "Ring"

COG groups jurisdictions into three "rings" for analysis purposes (see Appendix A). The Central Jurisdictions—D.C., Alexandria, and Arlington—added 14 new buildings and 2.4 million square feet of new space in 2024—an fall of 54 percent from 2023 (Figure 10). At the end of 2024, the vacancy rate for Central Jurisdictions was 16.1 percent.

In 2024, 45 new buildings and 4.2 million square feet of space were added to the Inner Suburban Jurisdictions of Fairfax, Montgomery, and Prince George's Counties, Falls Church, and City of Fairfax (Figure 9). The total square footage of new space increased 28 percent from 2023 (Figure 10). The overall vacancy rate for Inner Jurisdictions was 11.7 percent at the end of 2024.

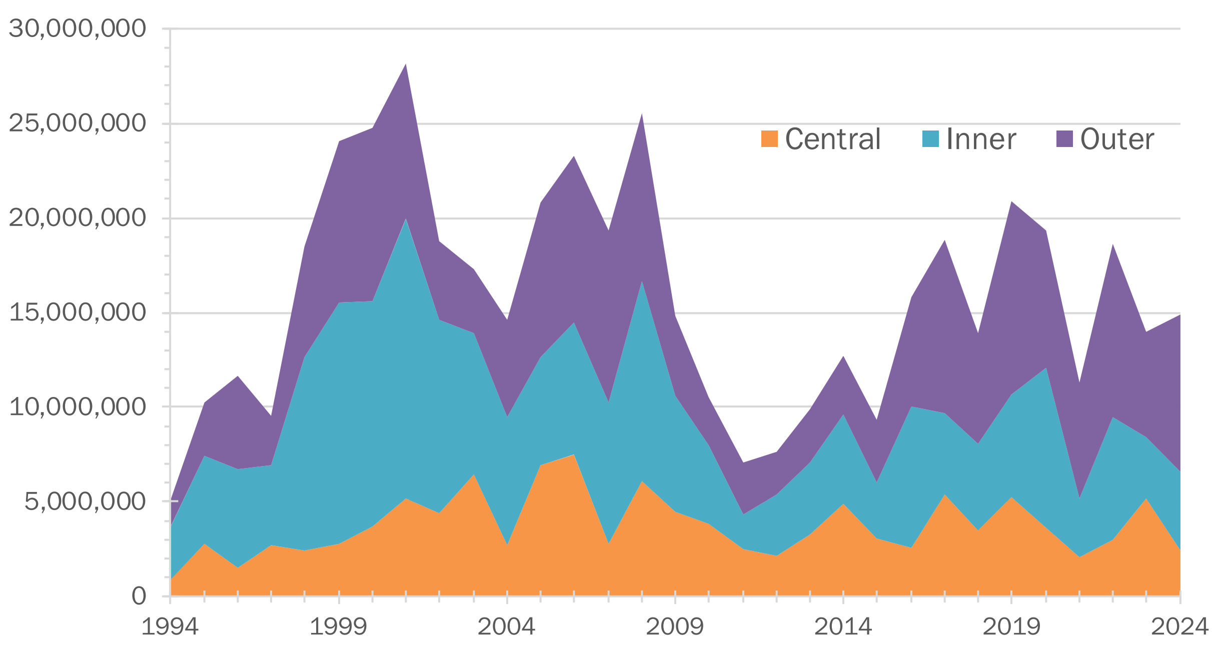
The Outer Jurisdictions of Charles, Frederick, Loudoun, and Prince William Counties, Manassas, and Manassas Park added 77 buildings and 8.3 million square feet of space in 2022 (Figure 9). New construction increased by 51 percent from 2023 (Figure 10). At the end of 2024, the vacancy rate for Outer Jurisdictions was 4.3 percent.

Figure 9. 2024 Projects by Rentable Building Area



Source: CoStar

Figure 10. Square Footage of Completed Commercial Construction by Jurisdictional Groups, 1994 - 2024



Note: This stacked area chart shows cumulative values.

Source: CoStar

Commercial Construction by Jurisdiction

Loudoun County led the region in commercial construction, accounting for 30 percent of the region's new space in 2024; almost 80 percent of Loudoun's construction total came from its 12 new data centers. Prince William had the second most construction, also buoyed by data centers.

The decline in the office market was felt across all jurisdictions in 2024 but hit Central and Inner Suburban jurisdictions the hardest. More than one-fifth of all commercial space in Arlington County was vacant in 2024. While office vacancies have raised the overall vacancy rate in the COG region, the strong industrial/flex market has lowered the vacancy rate in Outer Suburban jurisdictions.

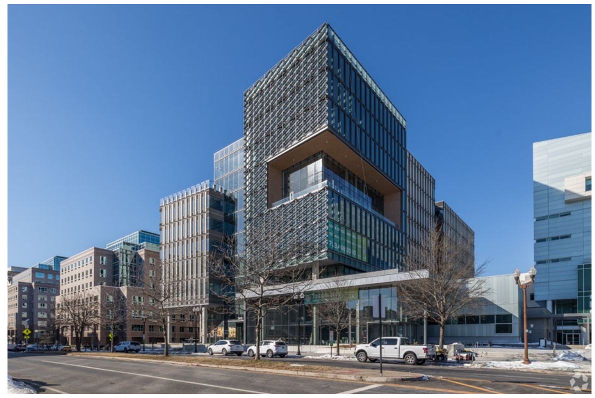
Figure 11. Commercial Construction Totals for Each COG Member Jurisdiction

Jurisdiction	Built Prior to 2024			2024 Completions			Estimated 2024 Year End Vacancy Rate
	Buildings	RBA	Share	Buildings	RBA	Share	
District of Columbia	**8,240**	**272,962,555**	**22.3%**	**10**	**1,751,099**	**11.7%**	**15.2%**
Suburban Maryland Jurisdictions							
Charles	1,299	20,385,571	1.7%	5	112,688	0.8%	5.6%
Frederick	2,858	57,192,867	4.7%	19	1,210,067	8.1%	7.1%
City of Frederick	*1,408*	*26,006,424*	*2.1%*	*10*	*424,034*	*2.8%*	*9.2%*
Rest of County	*1,450*	*31,186,443*	*2.6%*	*9*	*786,033*	*5.3%*	*5.5%*
Montgomery	5,563	175,554,953	14.4%	14	975,391	6.5%	12.8%
Gaithersburg	*591*	*18,754,688*	*1.5%*	*1*	*5,060*	*0.0%*	*7.9%*
Rockville	*638*	*25,301,207*	*2.1%*	*2*	*60,548*	*0.4%*	*17.7%*
Takoma Park	*132*	*1,803,831*	*0.1%*	*0*	*0*	*0.0%*	*5.5%*
Rest of County	*4,202*	*129,695,227*	*10.6%*	*11*	*909,783*	*6.1%*	*12.6%*
Prince George's	6,912	166,403,378	13.6%	16	1,720,800	11.5%	8.7%
Bladensburg	*113*	*1,281,748*	*0.1%*	*0*	*0*	*0.0%*	*0.7%*
Bowie	*257*	*7,142,052*	*0.6%*	*2*	*59,640*	*0.4%*	*7.0%*
College Park	*252*	*5,131,806*	*0.4%*	*1*	*23,375*	*0.2%*	*6.6%*
Greenbelt	*107*	*5,253,357*	*0.4%*	*1*	*2,332*	*0.0%*	*19.2%*
Hyattsville	*238*	*4,525,625*	*0.4%*	*0*	*0*	*0.0%*	*11.4%*
Laurel	*392*	*5,708,585*	*0.5%*	*1*	*4,476*	*0.0%*	*6.4%*
Rest of County	*5,553*	*137,360,205*	*11.2%*	*11*	*1,630,977*	*10.9%*	*8.5%*
Maryland subtotal	**16,632**	**419,536,769**	**34.3%**	**54**	**4,018,946**	**26.9%**	**10.0%**
Northern Virginia Jurisdictions							
Alexandria	1,726	40,068,723	3.3%	2	105,750	0.7%	14.3%
Arlington	1,015	64,530,253	5.3%	2	545,576	3.7%	20.9%
Fairfax	4,899	217,052,791	17.8%	9	1,397,494	9.4%	13.2%
Fairfax City	510	9,697,971	0.8%	5	73,433	0.5%	6.1%
Falls Church	265	4,161,029	0.3%	1	10,971	0.1%	8.7%
Loudoun	2,731	113,230,640	9.3%	28	4,451,513	29.8%	3.8%
Manassas City	656	11,175,172	0.9%	2	192,752	1.3%	2.7%
Manassas Park	129	2,185,507	0.2%	0	0	0.0%	2.6%
Prince William	2,552	68,090,041	5.6%	23	2,378,588	15.9%	2.8%
Virginia subtotal	**14,483**	**530,192,127**	**43.4%**	**72**	**9,156,077**	**61.3%**	**10.4%**
COG Region Total	**39,355**	**1,222,691,451**	**100.0%**	**136**	**14,926,122**	**100.0%**	**11.3%**

Source: CoStar

Metrorail Station Walksheds

In 2024, 17 of the Washington Metropolitan Area Transit Authority's 98 Metrorail stations had at least one commercial construction project built within a half-mile walk from a station entrance, with 2.3 million square feet in 14 buildings (some projects were near more than one Metrorail station). Office space accounted for 68 percent of construction built in a Metrorail walkshed.



The Fuse at Mason Square located between the Virginia Square and Clarendon Metrorail Stations was the largest project office project and largest project in a Metrorail walkshed in 2024. (3401 Fairfax Dr - Fuse at Mason Square – Primary Photo / CoStar)

Construction in station areas decreased 46 percent from 2023. The share of regional construction within a Metro station walkshed fell from 31 percent in 2023 to 15 percent in 2024—the lowest share of annual commercial construction in Metrorail walksheds since 1998.

The Virginia Square-GMU Metrorail station walkshed had the most construction, followed by the Clarendon station. The vacancy rate in Metrorail walksheds was 17.9 percent at the end of 2024.

Regional Activity Centers and HCT Station Walksheds

Regional Activity Centers are locations that will accommodate the majority of the region's future growth. They include existing urban centers, priority growth areas, traditional towns, and transit hubs. In 2025, the COG Board of Directors approved 145 updated Round 10.0 Regional Activity Centers[2].

From 2023 to 2024, construction within Regional Activity Centers fell by nine percent. The Ashburn Station/Loudoun Gateway Regional Activity Center had the most construction in 2024, with four data centers along Lockridge Road, totaling 1.3 million square feet.

COG's *Region Forward Vision* set a target for at least 75 percent of new commercial construction to be located within Regional Activity Centers. In 2024, 43 percent of new construction was in Regional Activity Centers. Since the *Region Forward Vision* was approved by the COG Board in 2010, 56 percent of construction has been inside Regional Activity Centers. Using the newly approved and more compact geographies for Regional Activity Centers, the target has not been met since 2010; the target had been met in 2012 using the previous Round 8.0 Regional Activity Centers geography.

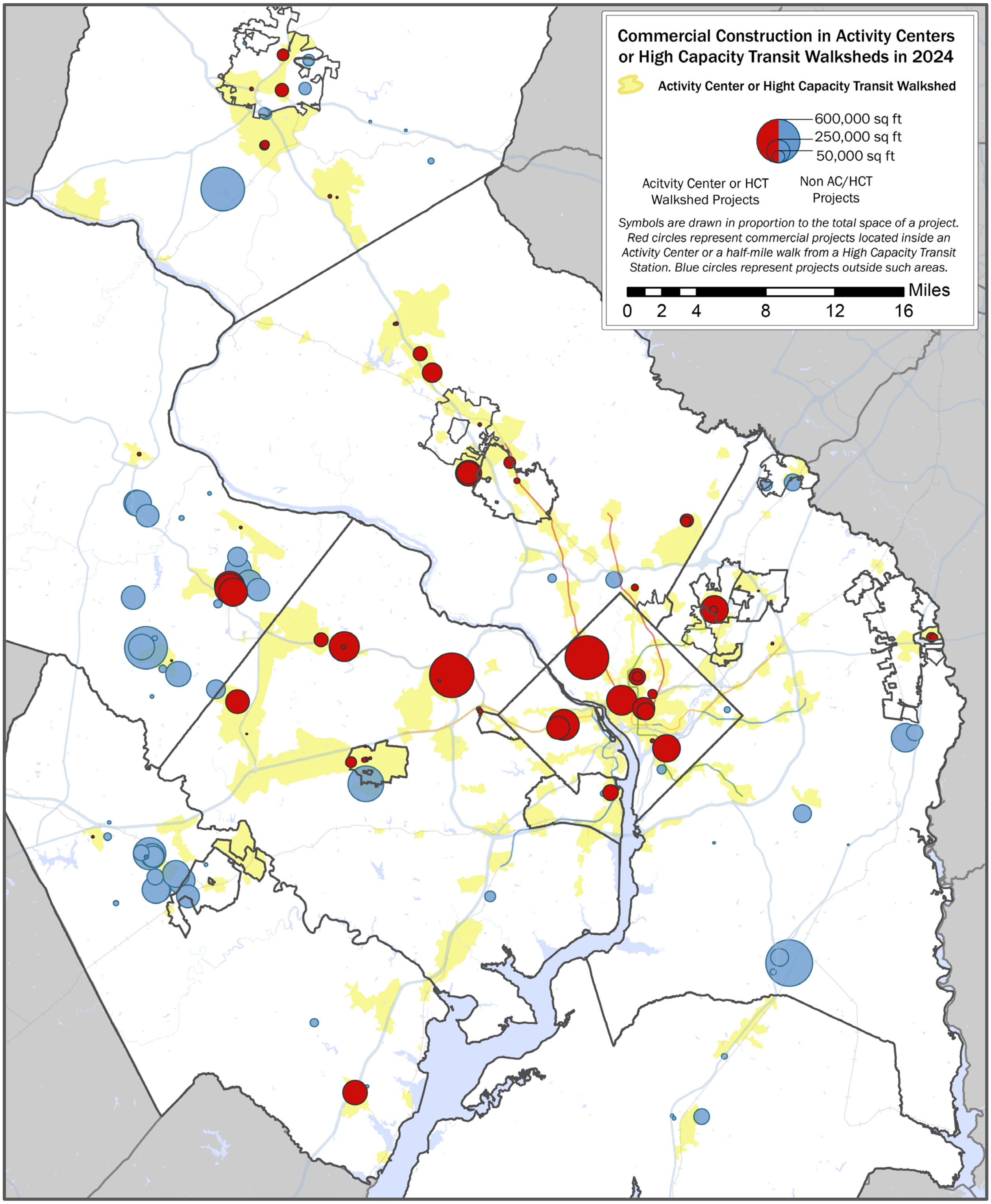
The Transportation Planning Board has identified 244 High-Capacity Transit Station Areas (HCTs) in the region—locations around Metrorail, commuter rail, light rail, bus rapid transit, and streetcar stations.[3] These areas offer opportunities for greater connectivity and creating more transit-oriented communities.

Last year, 17 percent of new commercial construction was located within an HCT. The 56 new projects completed within either an Activity Center or HCT are shown in Figure 12 below.

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

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

Figure 12



Source: CoStar, COG

Construction by Structure Type

With almost two-thirds of all new space, the industrial/flex sector was the category with the most construction in 2024. The second most added space come from the office sector, although at a much lower share of the total than in past years.

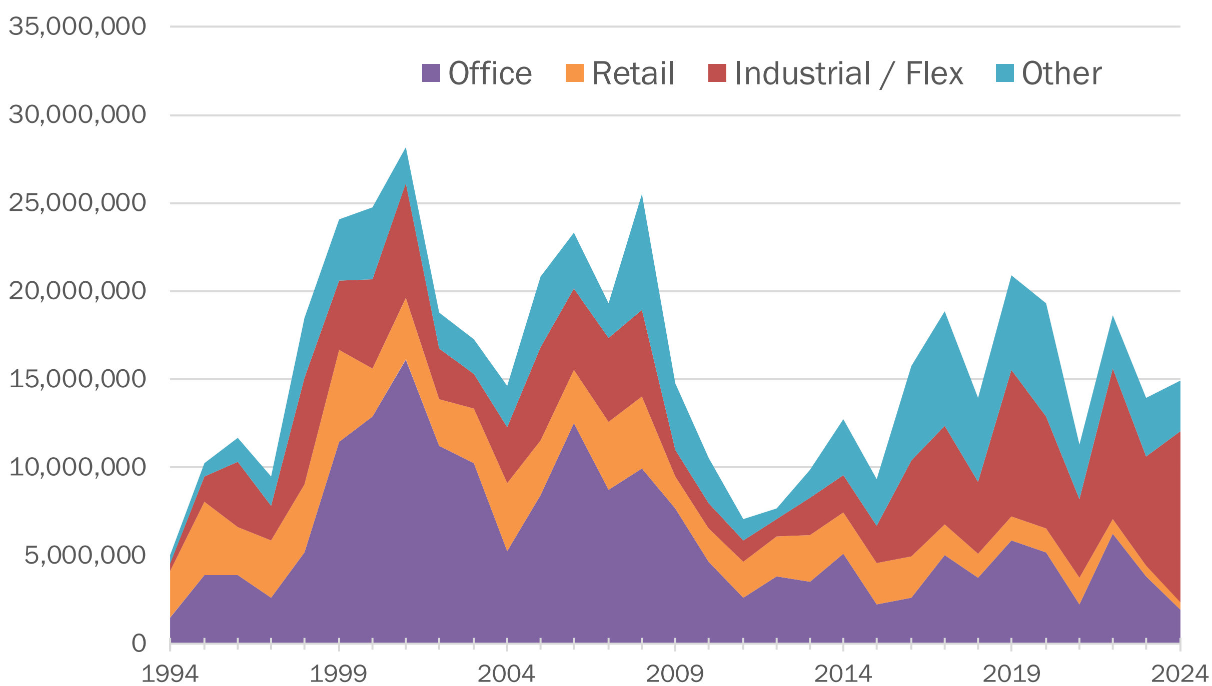
Both the office and retail sectors have declined considerably over the past decade but have continued to be the main sector in Central jurisdictions and near Metrorail stations. The hospitality sector also has a presence in urban neighborhoods, and has remained strong since the pandemic.

Figure 13. Table of Construction by Structure Type

Structure Type	Prior to 2024			2024		
	Buildings	Square Feet	Share	Buildings	Square Feet	Share
Office	10,364	504,467,582	41.3%	19	1,922,706	12.9%
Retail	17,950	231,114,421	18.9%	41	423,546	2.8%
Industrial / Flex	6,803	271,121,865	22.2%	55	9,711,977	65.1%
Healthcare	458	53,013,413	4.3%	4	825,672	5.5%
Hospitality	550	69,662,884	5.7%	5	1,191,765	8.0%
Other	3,230	93,311,286	7.6%	12	850,456	5.7%
Total	39,355	1,222,691,451	100.0%	136	14,926,122	100.0%

Source: CoStar

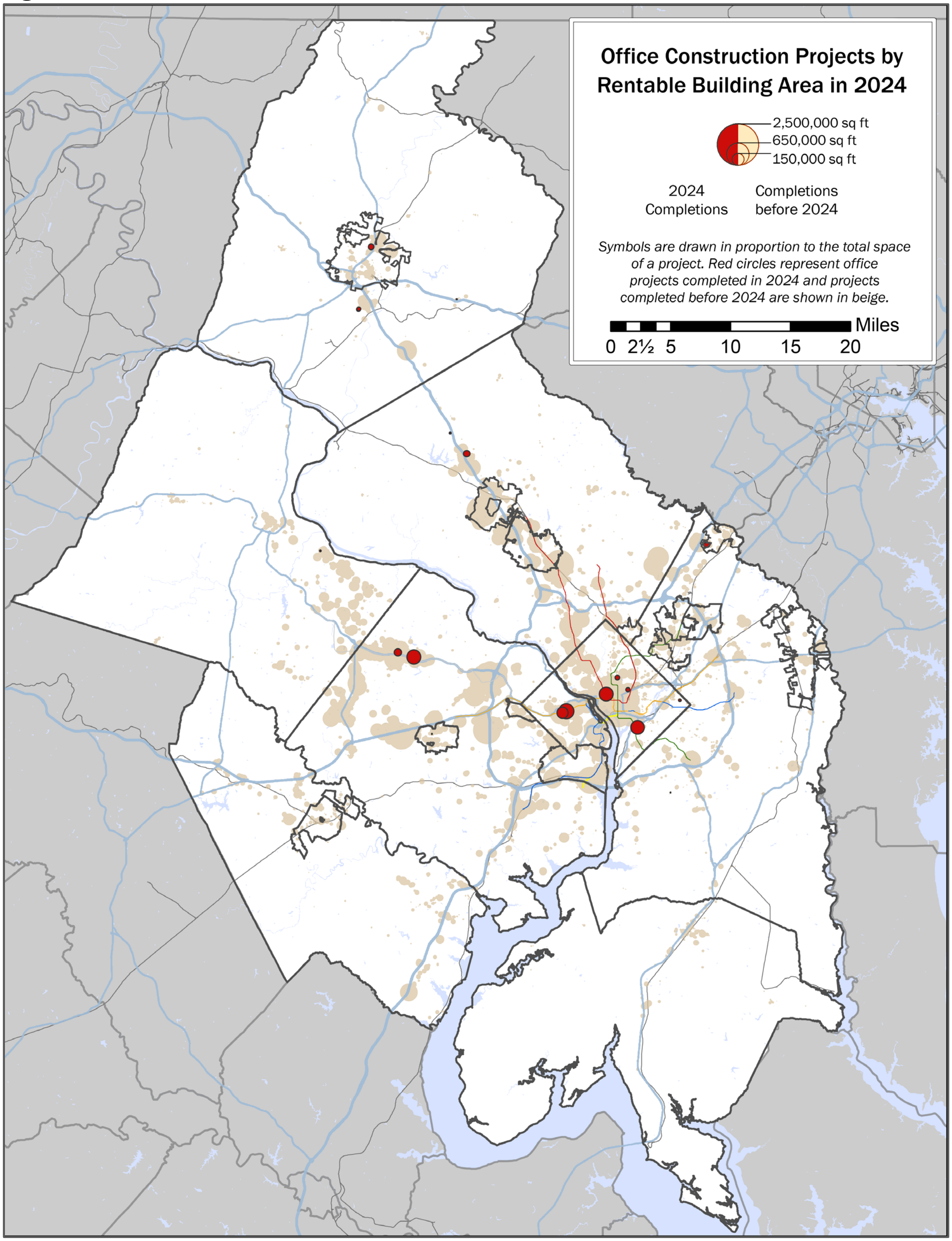
Figure 14. Square Footage of Completed Commercial Construction by Structure Type, 1994 - 2024



Note: This stacked area chart shows cumulative values.

Source: CoStar

Figure 15



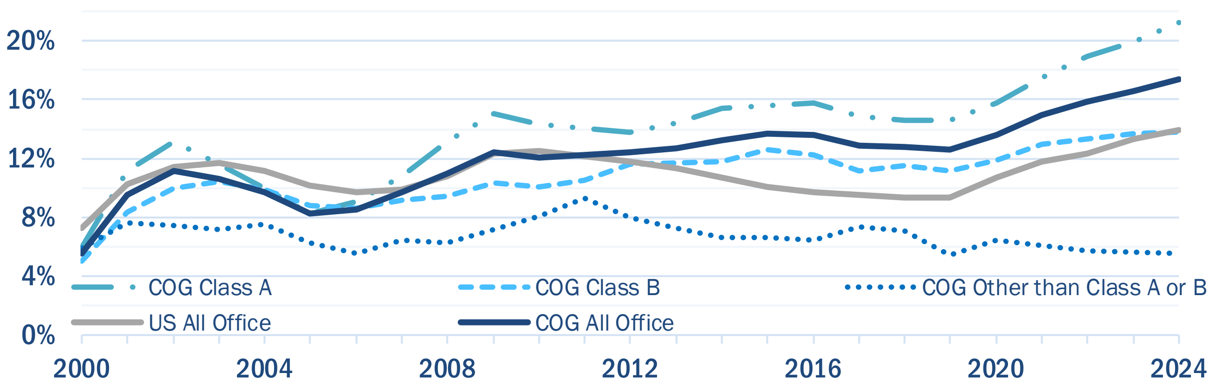
Source: CoStar

Office Construction

Construction of new office space fell 50 percent from 2023 to 2024, to the lowest total since 1994. A combined total of 1.9 million new square feet was added in 2024, from 19 new buildings. The 10-story, 345,000 square foot Fuse at Mason Square in Arlington was the largest office project.

Figure 15 on the previous page shows 2024 office projects. The District of Columbia had 707,857 square feet of space—the most new office space of any jurisdiction. With only 13 percent of new office construction in 2024, the Suburban Maryland jurisdictions experienced the largest decline.

Figure 16. Office Vacancy Rate in the COG Region, 2000 - 2024

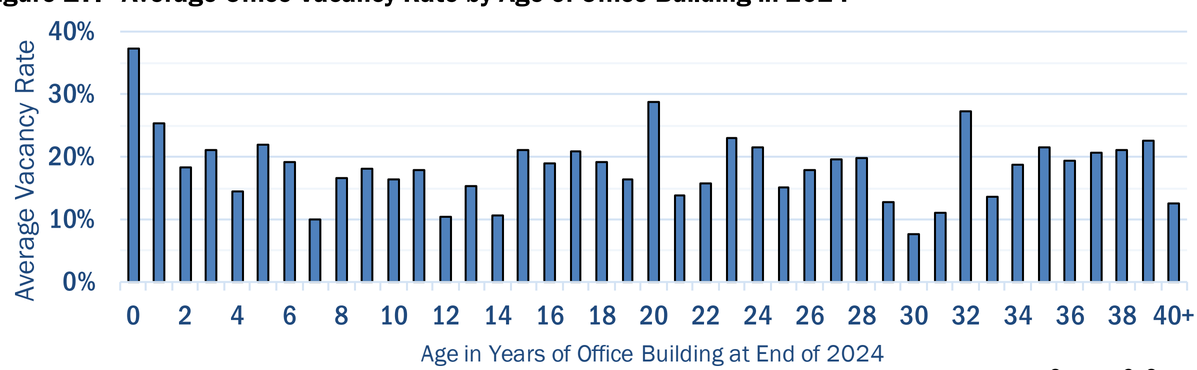


Source: CoStar

The region's already high office vacancy rate has increased since 2019, as have rates across the country. The regional average vacancy rate for office space was 17.4 percent at the end of 2024, the highest recorded office vacancy for the region in the CoStar database (Figure 16). Arlington County (23.2%) and the cities of Alexandria (20.1%), Greenbelt (23.1%), Hyattsville (20.4%), and Rockville (25.1%) were the only COG jurisdictions with the office vacancy rates above 20% at the end of 2024.

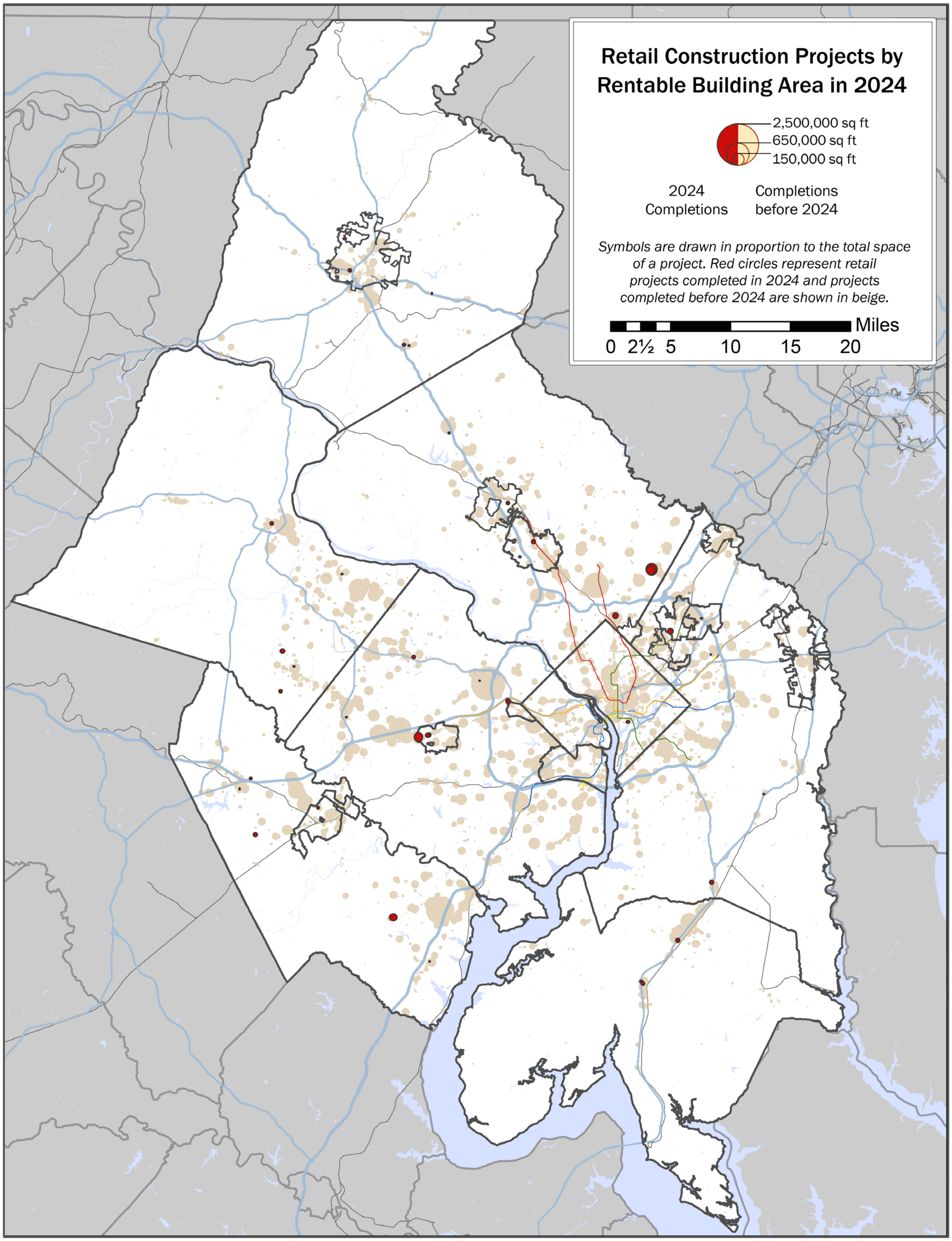
Office vacancies have been highest in Class A Space (21.2%), Northern Virginia (18.4%), and in buildings near Metrorail stations (19.7%). In recent years, newer buildings had higher vacancy rates than older buildings, but the gap between newer and older buildings has narrowed significantly since the beginning of the pandemic, and the gap disappears after the first year, much sooner than only a few years back. (Figure 17).

Figure 17. Average Office Vacancy Rate by Age of Office Building in 2024



Source: CoStar

Figure 18



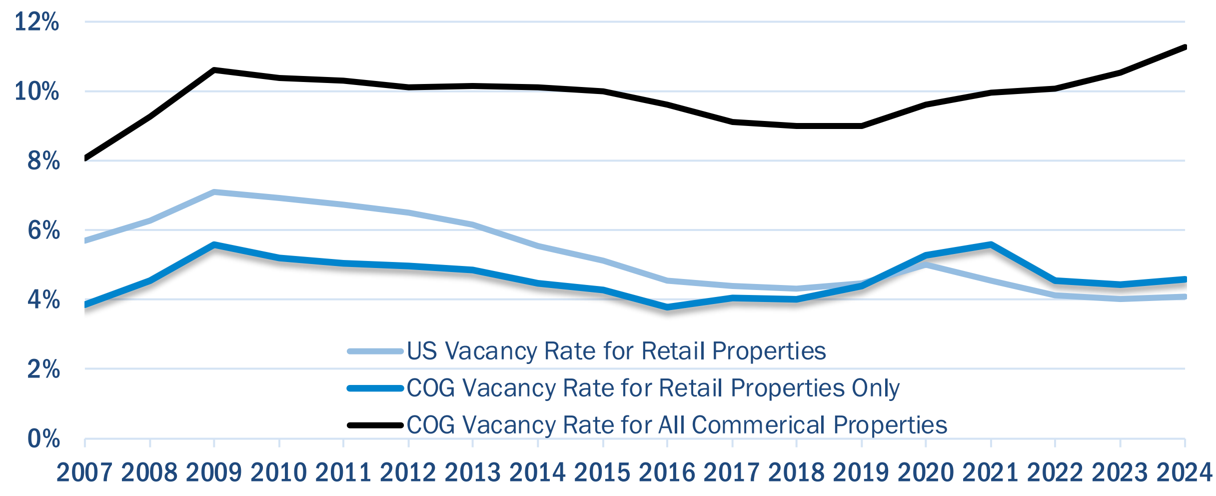
Source: CoStar

Retail Construction

Stand-alone retail construction fell by 30 percent from 2023 to 2024. Forty-one new retail projects were completed in 2024 with a combined total of 423,546 square feet. The largest project was the 64,647 square foot shopping center at the White Oak Town Center in Mongomery County.

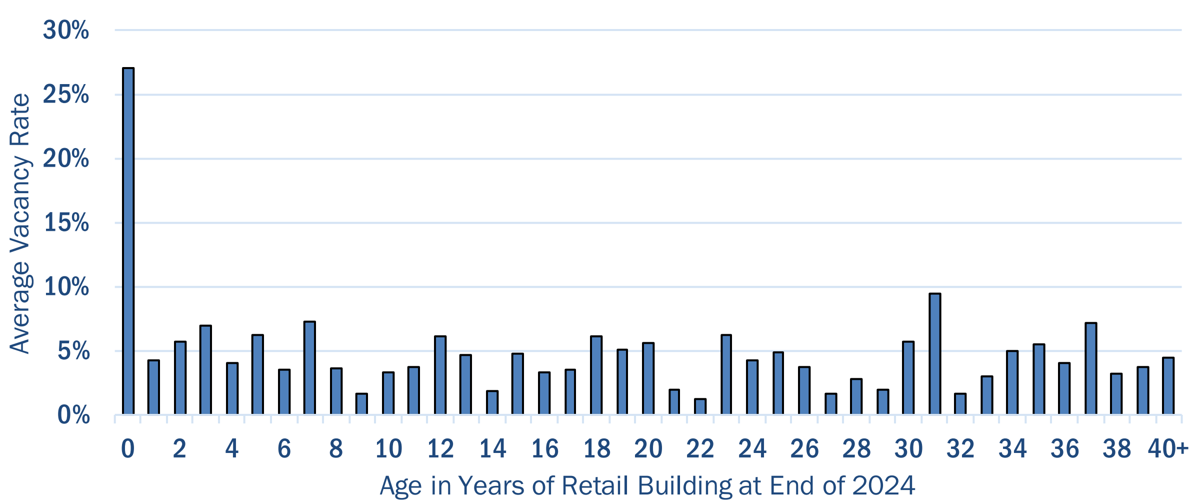
All major jurisdictions, except Arlingon County and the City of Alexandria, had at least one new retail building in 2024. A little over 70 percent of stand-alone retail construction in 2024 was in a Regional Activity Center while only eight percent of new stand-alone retail space was within a half-mile walk of a Metrorail station.

Figure 19. Retail Vacancy Rate in COG Region, 2007 - 2024



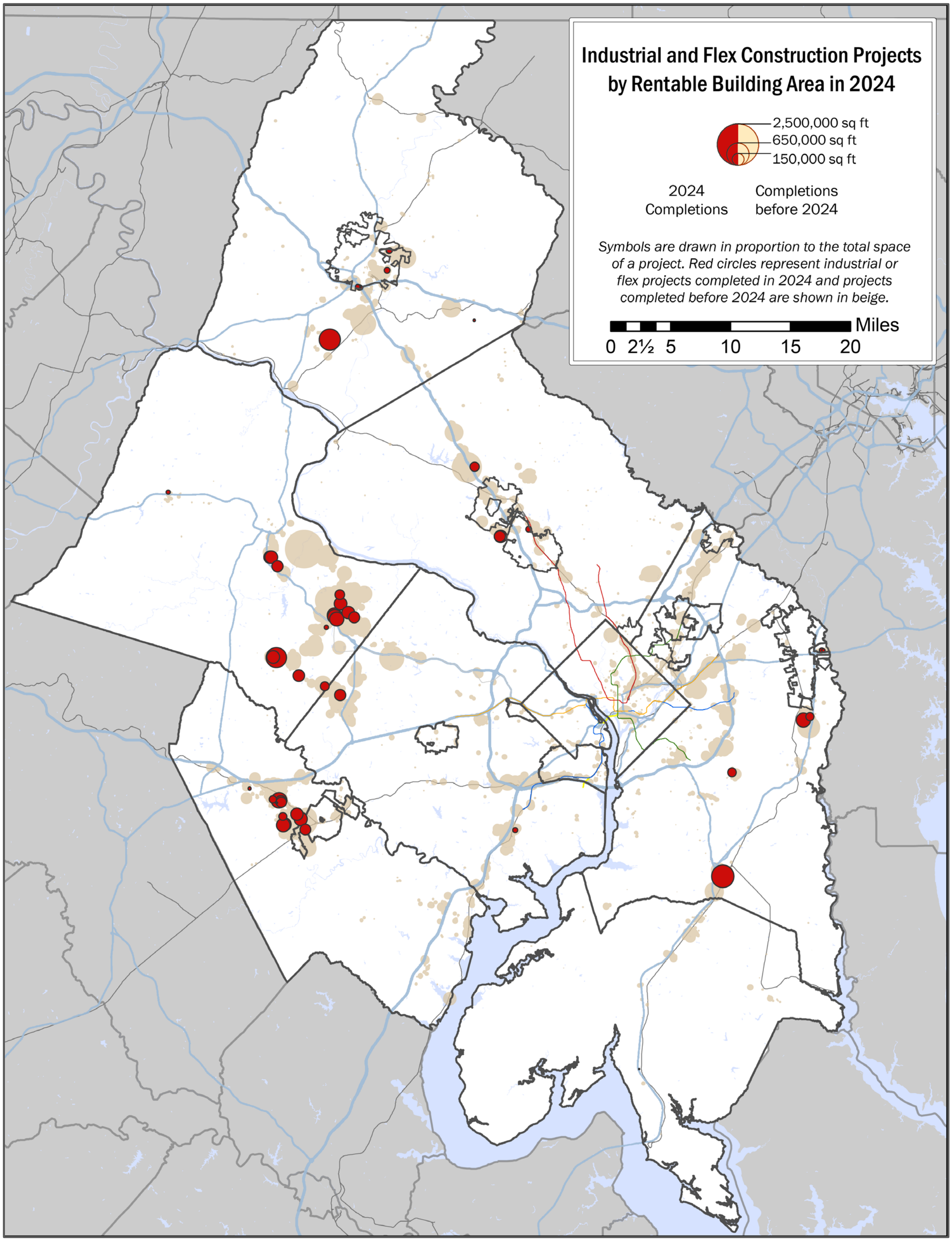
The overall regional vacancy rate for retail space was 4.6 percent at the end of 2024. Retail vacancies have dropped since the beginning of the pandemic. Retail properties tend have high vacancies in their first year but find tenants by the second year. (Figure 20).

Figure 20. Average Retail Vacancy Rate by Age of Retail Building in 2024



Source: CoStar

Figure 21

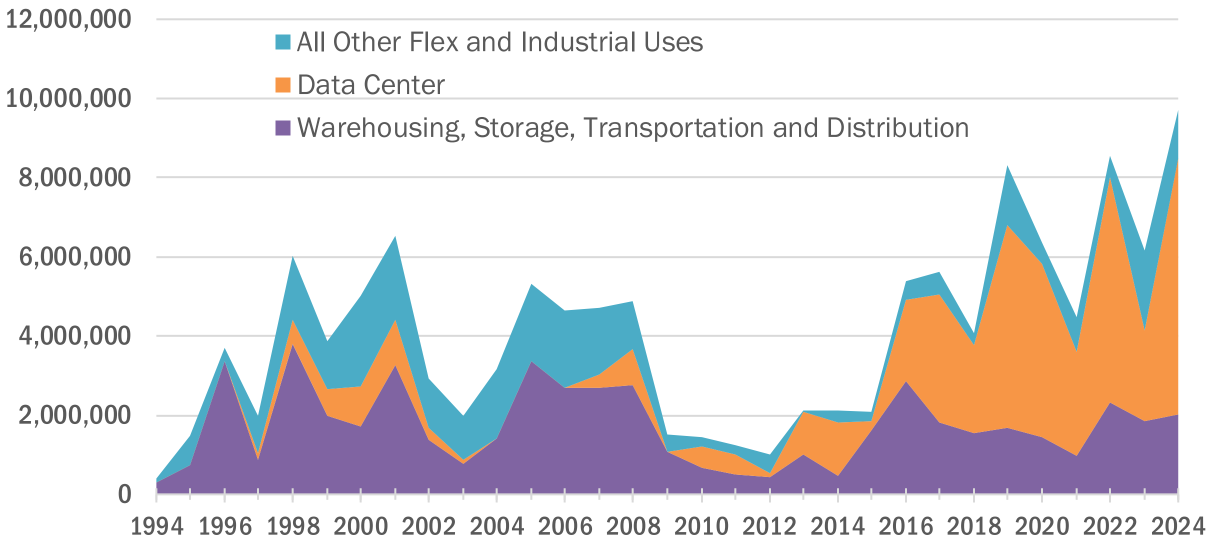


Source: CoStar

Industrial/Flex Construction

Construction of new industrial and flex space increased 58 percent from 2023 to 2024. About 9.7 million square feet of industrial or flex space was completed in 2024, from 55 new buildings. The single-story, 801,610 square foot ELP DC Building 1 warehouse in Brandywine, Prince George's County was the largest industrial project.

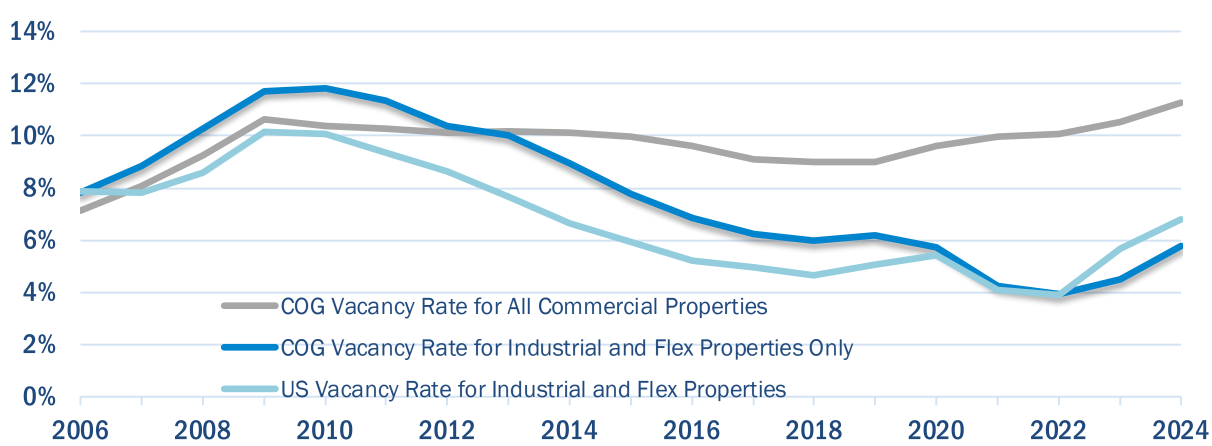
Figure 22. Square Footage of Completed Industrial and Flex Construction by Space Use, 1994 - 2024



Source: CoStar

Data centers represented two-thirds of all industrial and flex construction in 2024, followed by warehousing, storage, transportation and distribution facilities at 21 percent (Figure 22). Loudoun County accounted for 43 percent of all industrial / flex space in 2022, led by data center construction. Prince William also had a significant number of new data centers in 2024.

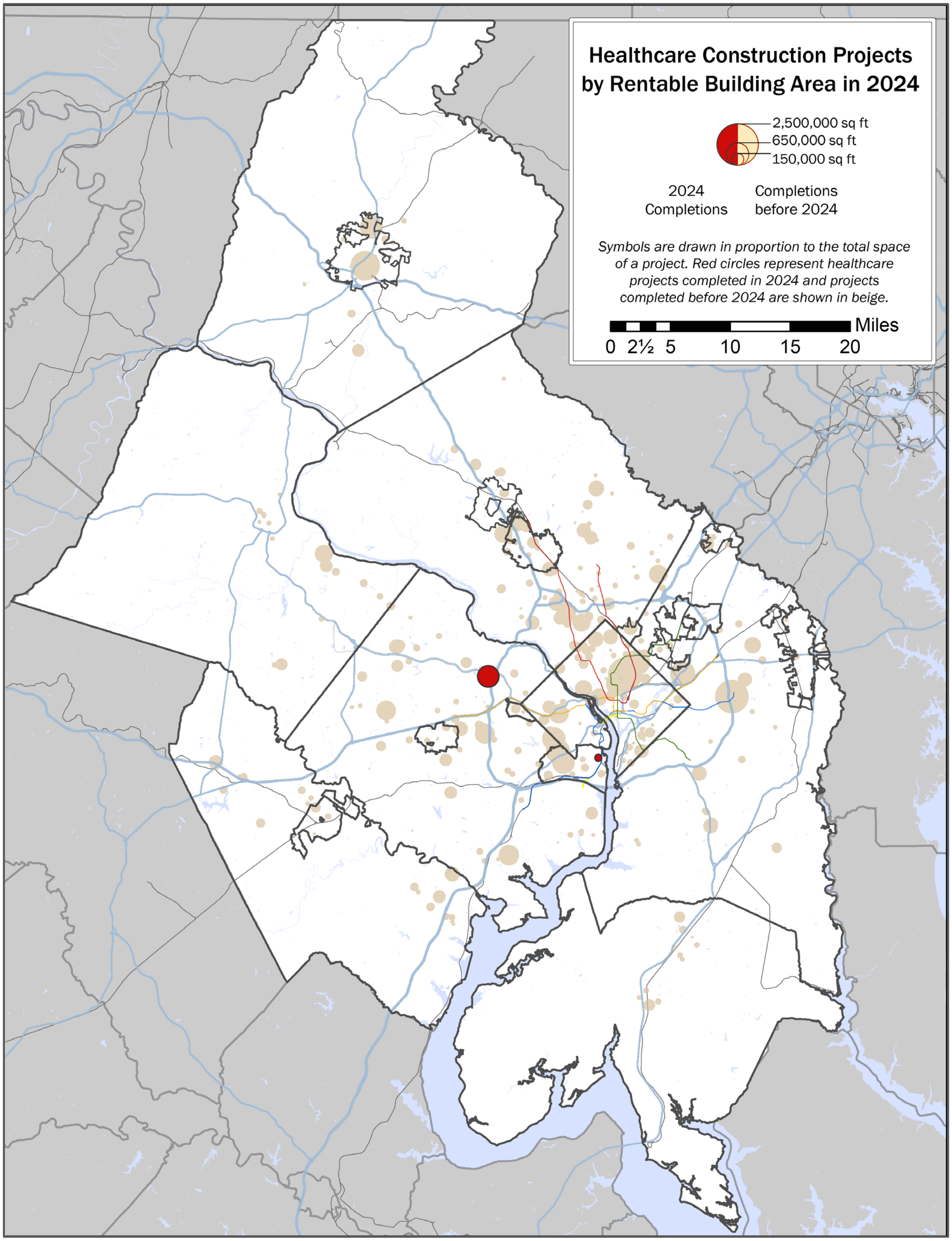
Figure 23. Vacancy Rate for Industrial and Flex Space, 2006 - 2024



Source: CoStar

The regional vacancy rate for industrial/flex space was 5.8 percent at the end of 2024. Vacancies have increased slightly since 2022, after previously falling for 13 consecutive years.

Figure 24



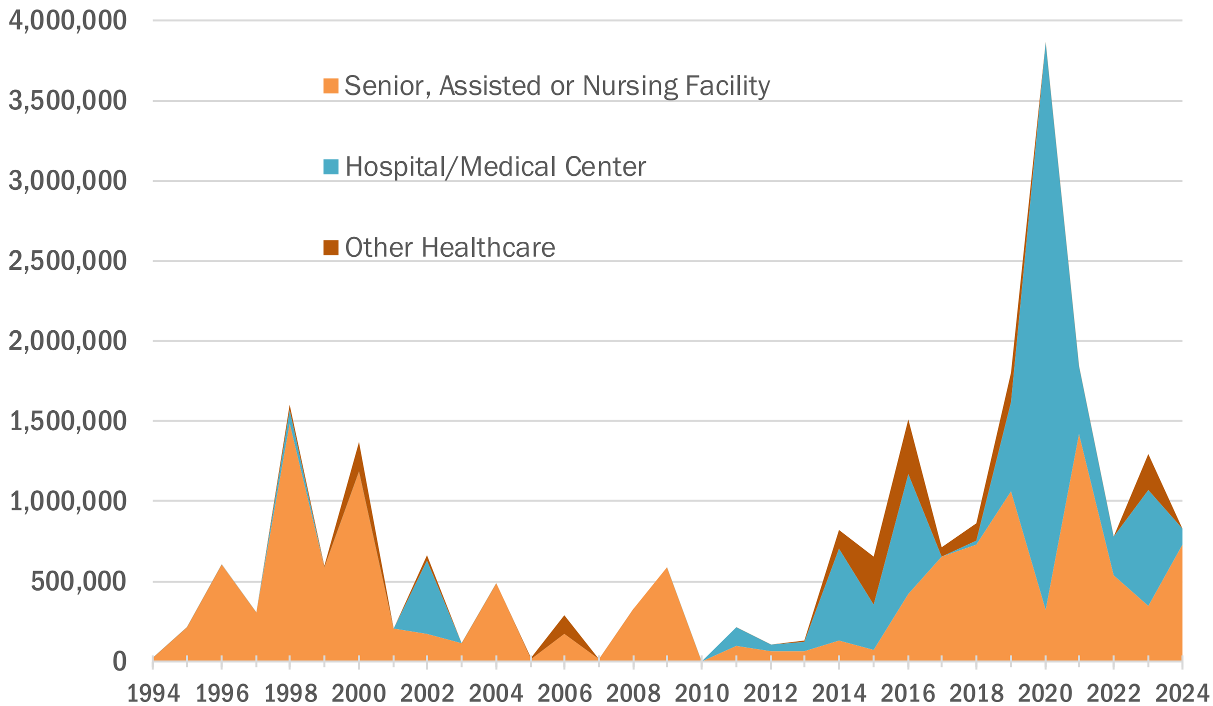
Source: CoStar

Healthcare Construction

Construction of new healthcare space declined 36 percent from 2023 to 2024. Four healthcare buildings were completed in 2024, totaling 825,672 square feet of space.

Figure 24 on the previous page shows healthcare facilities completed in 2024. The largest healthcare project was the 27-story, 729,473 square foot Mather at Arbor Row Congregate Senior Housing Community in Tysons, Fairfax County. Over the past decade, Montgomery County has added the most new healthcare space, with abou 22 percent of all new healthcare space.

Figure 25. Square Footage of Healthcare Construction by Space Use, 1994 - 2024

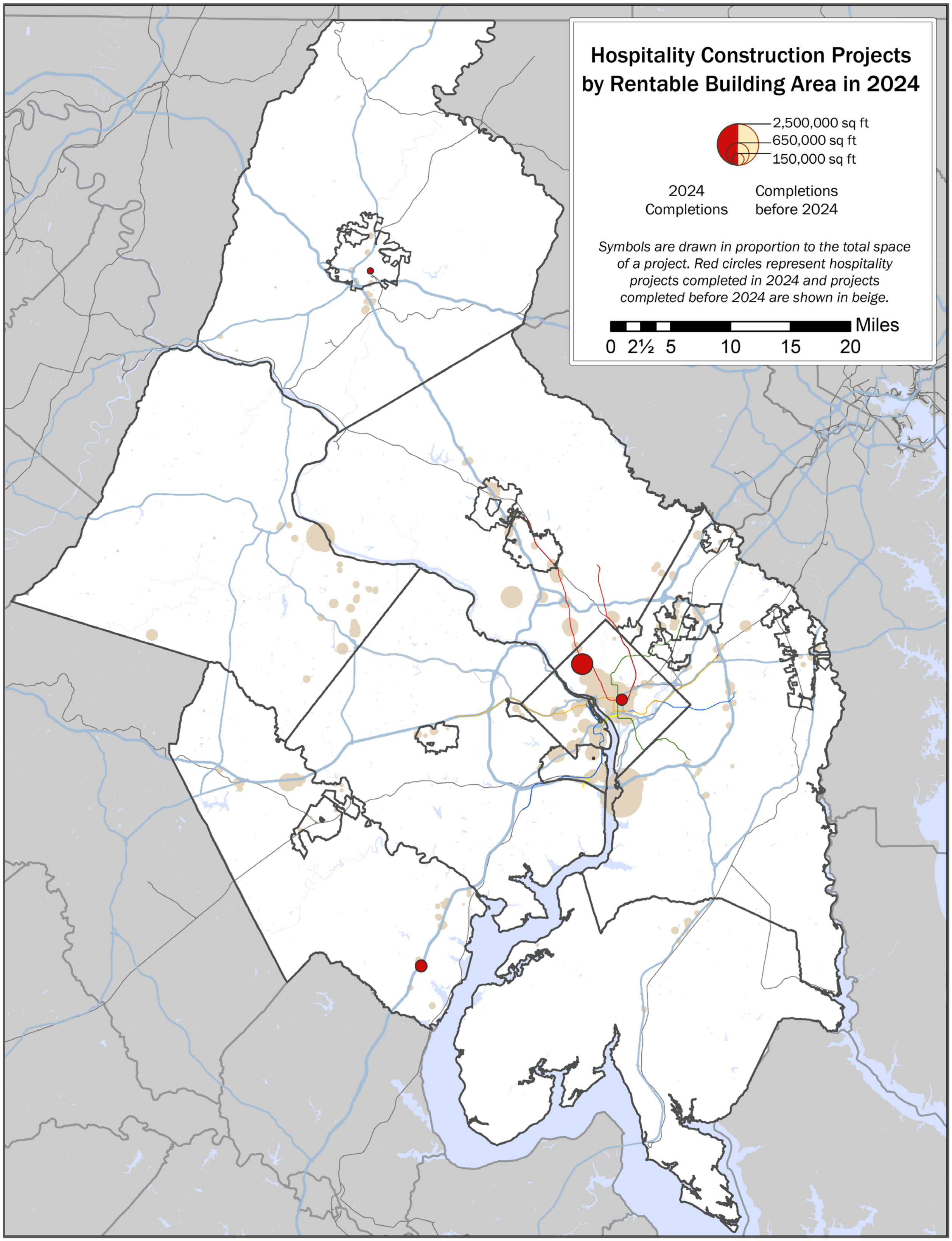


Source: CoStar

Properties that specialize in assisted living or care for seniors have historically been the largest part of the healthcare sector. Over the past 15 years, there has been an increase in hospitals and health center construciton, shown in blue in Figure 25.

Primary care and specialty doctor's offices that are located in office, retail or residential buildings are not included in the healthcare category. Medical or pharmaceutical research and manufacturing buildings are also excluded from the healthcare category, and are included in either the office or industrial total.

Figure 26

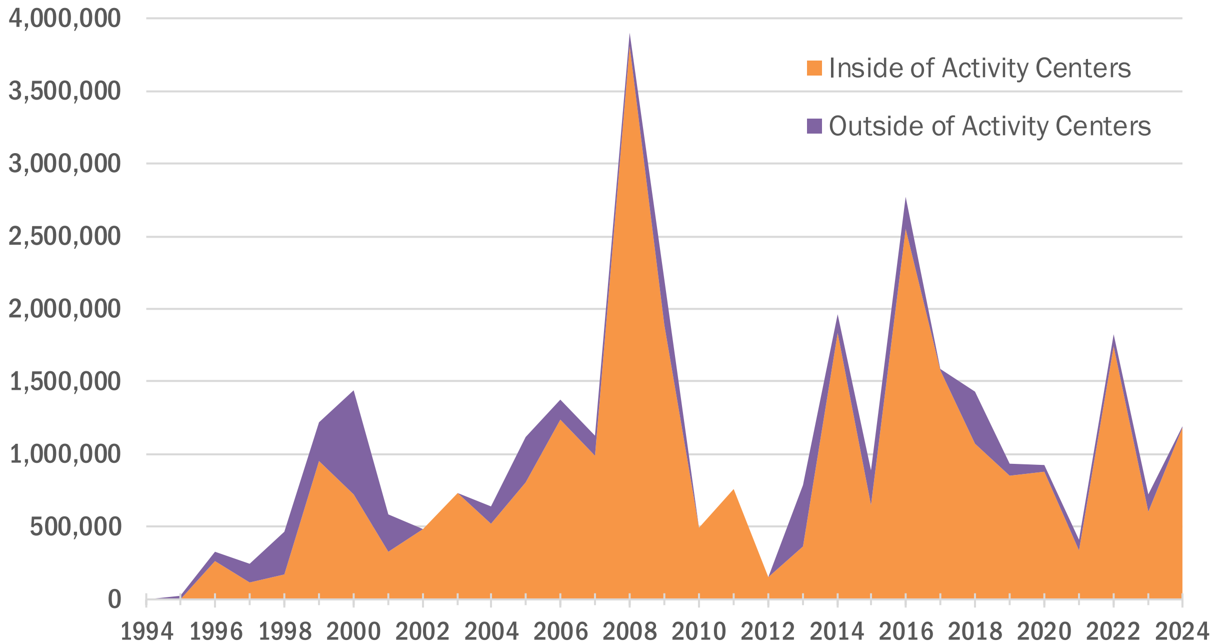


Source: CoStar

Hospitality Construction

Hospitality construction in the region grew by 65 percent from 2023 to 2024. Figure 26 on the preceding page shows the five new hospitality projects completed in 2024, adding 1.2 million square feet of hospitality space. The six-story, 697,573 Placemakr Cathedral Heights Popup Hotel at Upton Place in the District of Columbia was the largest hospitality project. The popup hotel offered a portion of apartment units in Upton Place as short-term stays while the building found new tenants. In 2025, the entire building transitioned to multi-family residential units and the popup hotel was closed.

Figure 27. Square Footage of Completed Hospitality Construction in Activity Centers, 1994 - 2024

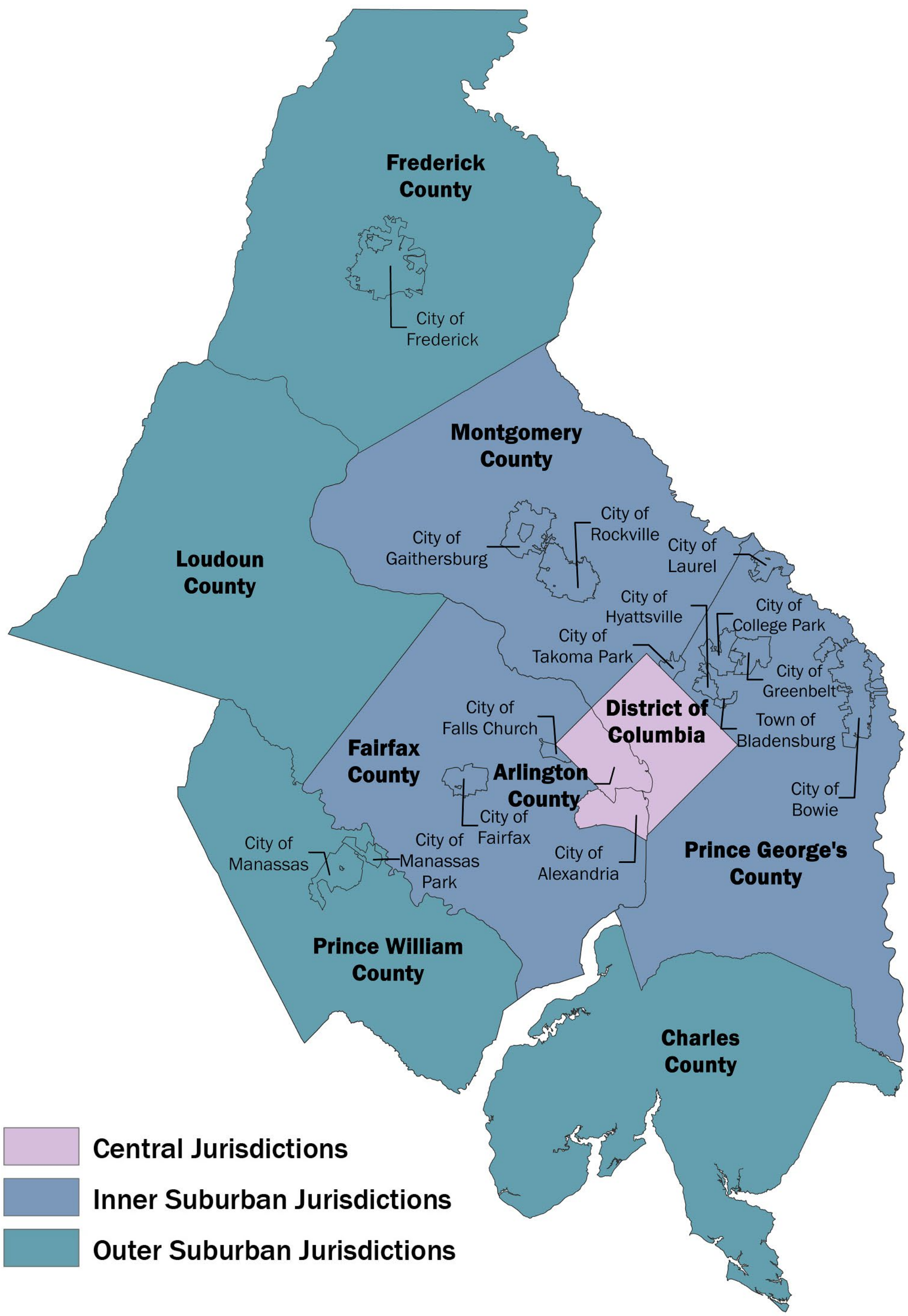


Source: CoStar

Hotel construction is highly concentrated in Activity Centers. The Downtown DC Regional Activity Center has the most hospitality space, hosting 24 hospitality buildings with a combined 7.0 million square feet of space. National Harbor leads Maryland Regional Activity Centers with 5.9 million square feet, while Crystal City has the most square footage in Virginia Regional Activity Centers at 3.6 million.

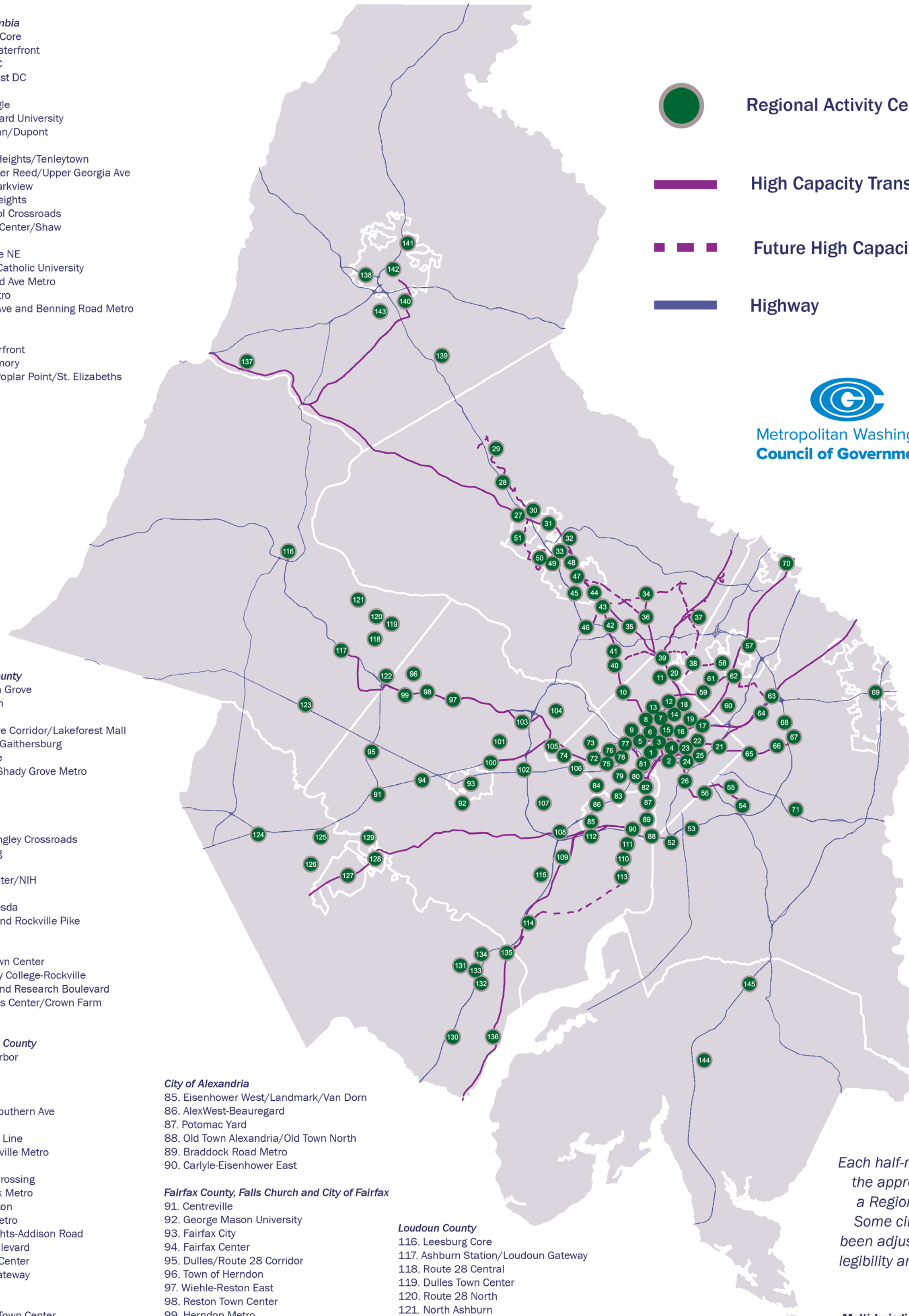
Figure 27 above shows total hospitality construction with space inside Regional Activity Centers in orange. Over the past five years, 93 percent of new hotel space has been built inside a Regional Activity Center, surpassed only by office construction at 97 percent.

APPENDIX A. MAP OF REGIONAL “RING” JURISDICTIONAL GROUPINGS



APPENDIX B. Regional Activity Centers Map based on the COG Round 10.0 Cooperative Forecast

Approved May 14, 2025 by COG Board of Directors



Each half-mile circle represents the approximate location of a Regional Activity Center. Some circle locations have been adjusted to increase map legibility and avoid overlapping.

District of Columbia
1. Monumental Core
2. Southwest Waterfront
3. Downtown DC
4. Downtown East DC
5. West End
6. Golden Triangle
7. U Street/Howard University
8. Adams Morgan/Dupont
9. Georgetown
10. Friendship Heights/Tenleytown
11. Former Walter Reed/Upper Georgia Ave
12. Petworth/Parkview
13. Columbia Heights
14. North Capitol Crossroads
15. Convention Center/Shaw
16. NoMA
17. New York Ave NE
18. Brookland/Catholic University
19. Rhode Island Ave Metro
20. Takoma Metro
21. Minnesota Ave and Benning Road Metro
22. H Street
23. Capitol Hill
24. Capitol Riverfront
25. Stadium-Armory
26. Anacostia/Poplar Point/St. Elizabeths

Montgomery County
27. Metropolitan Grove
28. Germantown
29. Clarksburg
30. Frederick Ave Corridor/Lakeforest Mall
31. Olde Towne Gaithersburg
32. Shady Grove
33. King Farm/Shady Grove Metro
34. Glenmont
35. Kensington
36. Wheaton
37. White Oak
38. Takoma/Langley Crossroads
39. Silver Spring
40. Bethesda
41. Medical Center/NIH
42. Grosvenor
43. North Bethesda
44. Twinbrook and Rockville Pike
45. Tower Oaks
46. Rock Spring
47. Rockville Town Center
48. Montgomery College-Rockville
49. Fallsgrove and Research Boulevard
50. Life Sciences Center/Crown Farm
51. Kentlands

Prince George's County
52. National Harbor
53. Oxon Hill
54. Branch Ave
55. Suitland
56. Naylor Rd-Southern Ave
57. Greenbelt
58. UMD Purple Line
59. West Hyattsville Metro
60. Port Towns
61. Hyattsville Crossing
62. College Park Metro
63. New Carrollton
64. Landover Metro
65. Capitol Heights-Addison Road
66. Morgan Boulevard
67. Largo Town Center
68. Landover Gateway
69. Bowie
70. Laurel
71. Westphalia Town Center

Arlington County
72. Ballston
73. Langston Boulevard
74. Washington Street/East Falls Church Metro
75. Virginia Square
76. Clarendon
77. Rosslyn
78. Court House
79. Columbia Pike
80. Pentagon City
81. Pentagon
82. Crystal City
83. Shirlington
84. Bailey's Crossroads-Western Gateway

City of Alexandria
85. Eisenhower West/Landmark/Van Dorn
86. AlexWest-Beauregard
87. Potomac Yard
88. Old Town Alexandria/Old Town North
89. Braddock Road Metro
90. Carlyle-Eisenhower East

Fairfax County, Falls Church and City of Fairfax
91. Centreville
92. George Mason University
93. Fairfax City
94. Fairfax Center
95. Dulles/Route 28 Corridor
96. Town of Herndon
97. Wiehle-Reston East
98. Reston Town Center
99. Herndon Metro
100. Vienna Metro
101. Town of Vienna
102. Merrifield
103. Tysons
104. McLean
105. West Falls Church/West Broad Street
106. East End/Seven Corners
107. Annandale
108. Beltway South
109. Franconia-Springfield
110. Beacon-Groveton
111. Huntington-Penn Daw
112. Bush Hill/Van Dorn Street Metro
113. Hybla Valley-Gum Springs
114. Lorton
115. Fort Belvoir North

Loudoun County
116. Leesburg Core
117. Ashburn Station/Loudoun Gateway
118. Route 28 Central
119. Dulles Town Center
120. Route 28 North
121. North Ashburn
122. Route 28 South
123. Arcola

Prince William, Manassas and Manassas Park
124. Gainesville
125. Sudley
126. Innovation Park Town Center
127. Downtown Manassas
128. Manassas Park
129. Yorkshire
130. Fettler Park/Dumfries
131. Quartz District
132. Potomac Town Center
133. Potomac Mills
134. The Landing at Prince William
135. North Woodbridge Town Center
136. Potomac Shores

Frederick County
137. Brunswick
138. The Golden Mile
139. Urbana
140. South Frederick
141. Northeast Frederick
142. Downtown Frederick
143. Ballenger Creek

Charles County
144. La Plata
145. Waldorf

Multi-Jurisdiction RACs

District of Columbia and Montgomery
10. Friendship Heights/Tenleytown
20. Takoma Metro

Montgomery and Prince George's
38. Takoma/Langley Crossroads

Arlington and Falls Church
74. Washington Street/East Falls Church Metro

Arlington and Fairfax County
84. Bailey's Crossroads-Western Gateway

Falls Church and Fairfax County
105. West Falls Church/West Broad Street
106. East End/Seven Corners

APPENDIX C. REGIONAL ACTIVITY CENTER TOTALS

Round 10.0 Regional Activity Center	Built Prior to 2024			2024 Completions			2024 Year End Vacancy Rate		
	Buildings	Square Feet	Share	Buildings	Square Feet	Share	Office	Retail	Industrial/Flex
Adams Morgan/Dupont	494	6,621,928	0.5%	0	0	0.0%	16.8%	7.0%	--
AlexWest-Beauregard	22	3,066,951	0.3%	0	0	0.0%	19.9%	0.0%	--
Anacostia/Poplar Point/St. Elizabeths	173	2,266,282	0.2%	1	288,000	1.9%	4.5%	0.9%	7.6%
Annandale	204	2,794,237	0.2%	0	0	0.0%	12.2%	1.0%	64.7%
Arcola	64	2,326,831	0.2%	1	1,793	0.0%	2.5%	3.5%	0.0%
Ashburn Station/Loudoun Gateway	44	4,312,257	0.4%	4	1,303,493	8.7%	0.7%	29.9%	0.0%
Bailey's Crossroads-Western Gateway	164	6,743,237	0.6%	0	0	0.0%	38.2%	3.5%	0.0%
Ballenger Creek	231	12,706,103	1.0%	2	61,500	0.4%	12.5%	0.7%	9.8%
Ballston	61	9,752,394	0.8%	0	0	0.0%	28.5%	7.4%	0.0%
Beacon-Groveton	37	763,177	0.1%	0	0	0.0%	42.0%	0.4%	--
Beltway South	110	6,217,050	0.5%	0	0	0.0%	19.9%	0.8%	6.1%
Bethesda	405	14,326,286	1.2%	0	0	0.0%	26.8%	2.2%	0.0%
Bowie	91	4,080,684	0.3%	2	59,640	0.4%	11.3%	6.7%	14.4%
Braddock Road Metro	196	1,557,972	0.1%	0	0	0.0%	8.6%	0.0%	0.0%
Branch Ave	42	1,922,135	0.2%	0	0	0.0%	0.0%	0.8%	68.5%
Brookland/Catholic University	162	2,194,479	0.2%	0	0	0.0%	0.0%	0.9%	12.8%
Brunswick	49	552,753	0.0%	0	0	0.0%	0.0%	2.5%	0.0%
Bush Hill/Van Dorn Street Metro	25	222,404	0.0%	0	0	0.0%	--	0.0%	14.2%
Capitol Heights-Addison Road	69	429,661	0.0%	0	0	0.0%	6.7%	0.0%	17.5%
Capitol Hill	218	2,573,348	0.2%	0	0	0.0%	1.7%	3.2%	0.0%
Capitol Riverfront	404	8,266,643	0.7%	1	9,000	0.1%	18.7%	8.7%	5.2%
Carlyle-Eisenhower East	172	11,123,788	0.9%	0	0	0.0%	25.0%	15.4%	0.0%
Centreville	90	2,434,427	0.2%	0	0	0.0%	14.7%	2.9%	0.0%
Clarendon	78	2,558,816	0.2%	0	0	0.0%	14.5%	10.1%	0.0%
Clarksburg	42	2,068,651	0.2%	2	9,000	0.1%	5.6%	0.7%	43.0%
College Park Metro	33	2,007,238	0.2%	0	0	0.0%	5.8%	13.1%	8.4%
Columbia Heights	168	1,505,056	0.1%	0	0	0.0%	5.5%	2.6%	3.3%
Columbia Pike	84	1,398,686	0.1%	0	0	0.0%	7.6%	10.0%	0.0%
Convention Center/Shaw	275	5,818,561	0.5%	0	0	0.0%	8.5%	7.2%	0.0%
Court House	62	5,121,873	0.4%	0	0	0.0%	30.5%	1.9%	--
Crystal City	106	15,844,211	1.3%	0	0	0.0%	28.6%	0.0%	0.0%

Round 10.0 Regional Activity Center	Built Prior to 2024			2024 Completions			2024 Year End Vacancy Rate		
	Buildings	Square Feet	Share	Buildings	Square Feet	Share	Office	Retail	Industrial/Flex
Downtown DC	248	50,075,868	4.1%	0	0	0.0%	19.0%	6.0%	--
Downtown East DC	259	25,846,372	2.1%	2	301,669	2.0%	14.6%	15.7%	--
Downtown Frederick	532	5,870,454	0.5%	1	65,820	0.4%	2.3%	4.1%	9.0%
Downtown Manassas	194	1,725,958	0.1%	0	0	0.0%	2.3%	0.4%	2.6%
Dulles Town Center	83	5,399,616	0.4%	0	0	0.0%	15.8%	24.3%	3.3%
Dulles/Route 28 Corridor	531	34,998,796	2.9%	2	205,210	1.4%	16.4%	0.9%	4.9%
East End/Seven Corners	99	2,825,192	0.2%	0	0	0.0%	17.1%	11.5%	0.0%
Eisenhower West/Landmark/Van Dorn	131	5,537,525	0.5%	0	0	0.0%	64.2%	0.9%	7.1%
Fairfax Center	168	14,346,175	1.2%	0	0	0.0%	21.2%	5.4%	0.0%
Fairfax City	515	9,931,758	0.8%	5	73,433	0.5%	8.2%	3.3%	3.4%
Fallsgrove and Research Boulevard	65	4,872,712	0.4%	0	0	0.0%	24.6%	0.0%	0.2%
Fettler Park/Dumfries	174	2,102,187	0.2%	1	228,750	1.5%	7.5%	5.1%	2.8%
Former Walter Reed/Upper Georgia Ave	277	2,375,212	0.2%	0	0	0.0%	0.9%	5.4%	5.9%
Fort Belvoir North	0	0	0.0%	0	0	0.0%	--	--	--
Franconia-Springfield	40	4,878,243	0.4%	0	0	0.0%	15.0%	7.6%	0.0%
Frederick Ave Corridor/Lakeforest Mall	109	4,678,773	0.4%	0	0	0.0%	21.1%	1.8%	16.3%
Friendship Heights/Tenleytown	179	7,556,285	0.6%	1	697,573	4.7%	18.3%	4.6%	0.0%
Gainesville	72	2,358,623	0.2%	1	3,086	0.0%	0.0%	0.3%	3.0%
George Mason University	0	0	0.0%	0	0	0.0%	--	--	--
Georgetown	525	8,087,084	0.7%	0	0	0.0%	20.9%	4.0%	0.0%
Germantown	194	8,727,386	0.7%	2	213,166	1.4%	25.6%	1.9%	10.4%
Glenmont	20	289,695	0.0%	0	0	0.0%	--	3.7%	--
Golden Triangle	383	43,136,969	3.5%	1	334,000	2.2%	21.8%	2.6%	0.0%
Greenbelt Metro	129	5,364,237	0.4%	1	2,332	0.0%	22.3%	12.8%	8.3%
Grosvenor	0	0	0.0%	0	0	0.0%	--	--	--
H Street	308	1,641,236	0.1%	0	0	0.0%	7.3%	7.0%	0.0%
Herndon Metro	21	3,120,491	0.3%	0	0	0.0%	32.5%	25.1%	--
Huntington-Penn Daw	57	853,411	0.1%	0	0	0.0%	20.8%	0.9%	--
Hyattsville Crossing	31	2,969,700	0.2%	0	0	0.0%	22.5%	10.3%	--
Hybla Valley-Gum Springs	65	1,477,044	0.1%	0	0	0.0%	0.0%	4.9%	0.0%
Innovation Park Town Center	11	301,708	0.0%	0	0	0.0%	0.0%	0.0%	0.0%
Kensington	189	2,111,336	0.2%	0	0	0.0%	3.2%	2.5%	5.1%
Kentlands	84	2,754,693	0.2%	0	0	0.0%	0.1%	1.7%	--
King Farm/Shady Grove Metro	56	5,183,621	0.4%	0	0	0.0%	19.8%	0.8%	0.0%

Round 10.0 Regional Activity Center	Built Prior to 2024			2024 Completions			2024 Year End Vacancy Rate		
	Buildings	Square Feet	Share	Buildings	Square Feet	Share	Office	Retail	Industrial/Flex
La Plata	101	1,184,157	0.1%	0	0	0.0%	3.4%	0.0%	0.0%
Landover Gateway	21	1,005,794	0.1%	0	0	0.0%	0.0%	13.8%	0.0%
Landover Metro	49	2,426,765	0.2%	0	0	0.0%	0.0%	2.2%	5.5%
Langston Boulevard	176	1,589,280	0.1%	0	0	0.0%	15.7%	2.3%	0.0%
Largo Town Center	67	6,354,530	0.5%	0	0	0.0%	6.4%	3.8%	1.9%
Laurel	293	3,219,437	0.3%	0	0	0.0%	6.8%	2.1%	10.4%
Leesburg Core	409	3,564,917	0.3%	1	4,733	0.0%	6.5%	2.8%	0.0%
Life Sciences Center/Crown Farm	137	10,222,904	0.8%	2	442,000	3.0%	15.4%	0.9%	11.9%
Lorton	122	4,023,483	0.3%	0	0	0.0%	14.0%	7.8%	8.9%
Manassas Park	129	2,185,507	0.2%	0	0	0.0%	2.2%	1.3%	3.0%
McLean	177	2,538,474	0.2%	0	0	0.0%	9.5%	0.1%	0.0%
Medical Center/NIH	5	642,930	0.1%	0	0	0.0%	0.0%	0.0%	--
Merrifield	259	14,871,608	1.2%	0	0	0.0%	12.8%	1.3%	9.2%
Metropolitan Grove	12	609,449	0.0%	0	0	0.0%	0.0%	0.0%	1.8%
Minnesota Ave and Benning Road Metro	82	1,037,085	0.1%	0	0	0.0%	0.9%	11.5%	4.9%
Montgomery College-Rockville	18	585,635	0.0%	1	48,000	0.3%	8.1%	0.0%	40.2%
Monumental Core	7	1,102,228	0.1%	0	0	0.0%	0.0%	#DIV/0!	--
Morgan Boulevard	27	694,300	0.1%	0	0	0.0%	--	0.0%	11.3%
National Harbor	22	6,361,317	0.5%	0	0	0.0%	22.1%	0.0%	--
Naylor Rd-Southern Ave	28	349,771	0.0%	0	0	0.0%	0.0%	0.0%	--
New Carrollton	74	3,101,856	0.3%	1	4,125	0.0%	26.1%	1.6%	0.0%
New York Ave NE	157	3,667,875	0.3%	0	0	0.0%	16.1%	9.2%	13.4%
NoMA	104	14,995,398	1.2%	1	32,251	0.2%	12.8%	20.6%	9.0%
North Ashburn	75	2,931,841	0.2%	1	2,500	0.0%	3.9%	5.2%	0.0%
North Bethesda	250	12,795,948	1.0%	0	0	0.0%	17.3%	2.3%	4.5%
North Capitol Crossroads	7	3,512,842	0.3%	0	0	0.0%	1.2%	0.0%	--
North Woodbridge Town Center	69	978,919	0.1%	0	0	0.0%	0.0%	7.2%	0.0%
Northeast Frederick	107	2,896,538	0.2%	1	53,138	0.4%	7.4%	1.5%	0.0%
Old Town Alexandria/Old Town North	671	8,094,024	0.7%	0	0	0.0%	11.6%	1.8%	0.0%
Olde Towne Gaithersburg	149	1,645,795	0.1%	0	0	0.0%	4.0%	2.0%	6.2%
Oxon Hill	86	1,663,430	0.1%	0	0	0.0%	26.9%	1.3%	0.0%
Pentagon	0	0	0.0%	0	0	0.0%	--	--	--
Pentagon City	16	5,348,766	0.4%	0	0	0.0%	18.1%	9.5%	--
Petworth/Parkview	257	1,581,353	0.1%	0	0	0.0%	17.7%	5.1%	0.0%

Round 10.0 Regional Activity Center	Built Prior to 2024			2024 Completions			2024 Year End Vacancy Rate		
	Buildings	Square Feet	Share	Buildings	Square Feet	Share	Office	Retail	Industrial/Flex
Port Towns	303	3,289,255	0.3%	0	0	0.0%	1.9%	2.0%	6.8%
Potomac Mills	104	5,048,071	0.4%	0	0	0.0%	19.7%	2.8%	6.5%
Potomac Shores	0	0	0.0%	0	0	0.0%	--	--	--
Potomac Town Center	16	757,949	0.1%	0	0	0.0%	22.9%	2.4%	--
Potomac Yard	19	1,202,451	0.1%	0	0	0.0%	0.0%	6.4%	0.0%
Quartz District	102	2,454,597	0.2%	0	0	0.0%	6.6%	0.8%	4.4%
Reston Town Center	106	13,579,254	1.1%	1	77,231	0.5%	15.7%	4.2%	0.0%
Rhode Island Ave Metro	17	736,135	0.1%	0	0	0.0%	--	11.5%	41.7%
Rock Spring	51	6,964,534	0.6%	0	0	0.0%	21.6%	10.3%	--
Rockville Town Center	86	3,596,910	0.3%	1	12,548	0.1%	31.2%	1.3%	0.0%
Rosslyn	57	10,877,745	0.9%	0	0	0.0%	18.7%	0.0%	2.3%
Route 28 Central	38	3,058,654	0.3%	0	0	0.0%	0.0%	0.1%	0.3%
Route 28 North	2	21,710	0.0%	0	0	0.0%	--	0.0%	--
Route 28 South	11	493,833	0.0%	0	0	0.0%	0.0%	0.0%	0.0%
Shady Grove	140	3,792,631	0.3%	0	0	0.0%	18.6%	0.0%	4.4%
Shirlington	15	1,217,804	0.1%	0	0	0.0%	13.3%	3.2%	--
Silver Spring	309	9,924,742	0.8%	1	19,000	0.1%	22.6%	5.5%	0.0%
South Frederick	210	5,526,342	0.5%	0	0	0.0%	16.2%	2.0%	4.4%
Southwest Waterfront	75	18,092,710	1.5%	0	0	0.0%	15.3%	4.3%	0.0%
Stadium-Armory	2	490,150	0.0%	0	0	0.0%	0.0%	--	--
Sudley	289	9,459,684	0.8%	0	0	0.0%	6.1%	4.0%	6.7%
Suitland	64	421,977	0.0%	0	0	0.0%	0.0%	0.6%	0.0%
Takoma Metro	55	573,612	0.0%	0	0	0.0%	9.2%	3.6%	71.4%
Takoma/Langley Crossroads	84	1,705,380	0.1%	0	0	0.0%	8.7%	4.0%	--
The Golden Mile	167	3,275,369	0.3%	1	5,768	0.0%	42.1%	15.1%	3.7%
The Landing at Prince William	47	1,549,593	0.1%	0	0	0.0%	21.0%	0.9%	2.6%
Tower Oaks	12	1,226,921	0.1%	0	0	0.0%	31.7%	0.0%	0.0%
Town of Herndon	262	7,793,138	0.6%	0	0	0.0%	17.2%	3.4%	8.5%
Town of Vienna	222	3,392,936	0.3%	0	0	0.0%	1.5%	5.1%	2.5%
Twinbrook and Rockville Pike	242	8,847,247	0.7%	0	0	0.0%	12.9%	6.4%	7.6%
Tysons	283	34,419,366	2.8%	3	732,673	4.9%	21.1%	1.6%	2.0%
U Street/Howard University	491	5,032,394	0.4%	1	41,000	0.3%	3.6%	5.4%	0.0%
UMD Purple Line	59	1,510,533	0.1%	1	23,375	0.2%	6.9%	5.6%	0.0%
Urbana	126	2,582,155	0.2%	2	8,538	0.1%	0.0%	3.2%	0.2%

Round 10.0 Regional Activity Center	Built Prior to 2024			2024 Completions			2024 Year End Vacancy Rate		
	Buildings	Square Feet	Share	Buildings	Square Feet	Share	Office	Retail	Industrial/Flex
Vienna Metro	3	599,507	0.0%	0	0	0.0%	77.4%	--	--
Virginia Square	52	2,046,458	0.2%	2	545,576	3.7%	21.7%	0.0%	0.0%
Waldorf	440	8,626,082	0.7%	0	0	0.0%	7.5%	5.7%	7.1%
Washington Street/East Falls Church Metro	145	1,942,939	0.2%	0	0	0.0%	4.6%	3.1%	0.0%
West End	45	4,383,841	0.4%	0	0	0.0%	11.2%	5.4%	--
West Falls Church/West Broad Street	102	1,614,434	0.1%	1	10,971	0.1%	26.0%	4.1%	0.0%
West Hyattsville Metro	49	689,382	0.1%	0	0	0.0%	4.5%	2.4%	0.0%
Westphalia Town Center	4	238,826	0.0%	0	0	0.0%	0.0%	--	--
Wheaton	187	3,460,591	0.3%	0	0	0.0%	9.1%	3.3%	0.0%
White Oak	141	7,022,567	0.6%	2	103,117	0.7%	15.6%	22.7%	3.7%
Wiehle-Reston East	126	10,188,013	0.8%	2	337,380	2.3%	31.9%	7.6%	0.0%
Yorkshire	106	1,001,284	0.1%	0	0	0.0%	0.8%	2.1%	3.4%
Inside of Activity Centers Total	*19,753*	*757,490,341*	*62.0%*	*56*	*6,361,389*	*42.6%*	*18.6%*	*5.0%*	*6.6%*
Outside of Activity Centers Total	*19,602*	*465,201,110*	*38.0%*	*80*	*8,564,733*	*57.4%*	*10.6%*	*3.4%*	*5.5%*
Regional Total	**39,355**	**1,222,691,451**	**100.0%**	**136**	**14,926,122**	**100.0%**	**17.4%**	**4.6%**	**5.8%**

Source: CoStar, COG

APPENDIX D. METRO STATION WALKSHED TOTALS

Metrorail Station Half-Mile Walkshed	Built Prior to 2024			2024 Completions			Percent Built Since Station Opened	2024 Year End Vacancy Rate
	Buildings	Square Feet	Share	Buildings	Square Feet	Share		
Addison Road-Seat Pleasant	26	235,763	0.0%	0	0	0.0%	76.5%	0.8%
Anacostia	51	627,851	0.1%	1	288,000	1.9%	28.0%	0.3%
Archives-Navy Memorial-Penn Qtr	150	18,922,447	1.5%	0	0	0.0%	64.5%	10.8%
Arlington Cemetery	0	0	0.0%	0	0	0.0%	--	--
Ashburn	9	678,429	0.1%	0	0	0.0%	0.0%	0.3%
Ballston-MU	77	10,855,476	0.9%	1	200,576	1.3%	91.7%	27.0%
Benning Road	30	228,381	0.0%	0	0	0.0%	33.8%	0.0%
Bethesda	311	12,734,331	1.0%	0	0	0.0%	66.2%	24.5%
Braddock Road	56	777,789	0.1%	0	0	0.0%	73.0%	11.6%
Branch Ave	12	852,414	0.1%	0	0	0.0%	80.5%	0.4%
Brookland-CUA	110	1,074,445	0.1%	0	0	0.0%	13.9%	0.4%
Capitol Heights	70	500,915	0.0%	0	0	0.0%	19.4%	12.4%
Capitol South	119	1,983,848	0.2%	0	0	0.0%	30.1%	1.4%
Cheverly	19	111,131	0.0%	0	0	0.0%	11.7%	0.0%
Clarendon	135	3,330,448	0.3%	1	345,000	2.3%	65.2%	13.1%
Cleveland Park	39	1,044,111	0.1%	0	0	0.0%	62.7%	71.0%
College Park-U of MD	37	796,303	0.1%	0	0	0.0%	10.1%	4.0%
Columbia Heights	217	2,090,726	0.2%	0	0	0.0%	41.4%	2.5%
Congress Heights	15	411,973	0.0%	0	0	0.0%	87.1%	0.0%
Court House	87	5,812,435	0.5%	0	0	0.0%	82.5%	28.2%
Crystal City	80	12,309,660	1.0%	0	0	0.0%	68.9%	27.7%
Deanwood	70	695,844	0.1%	0	0	0.0%	20.6%	0.0%
Downtown Largo	15	2,881,744	0.2%	0	0	0.0%	88.0%	3.5%
Dunn Loring-Merrifield	19	1,127,213	0.1%	0	0	0.0%	72.7%	12.5%
Dupont Circle	639	30,035,213	2.5%	1	334,000	2.2%	38.4%	22.8%
East Falls Church	5	164,550	0.0%	0	0	0.0%	70.9%	0.0%
Eastern Market	346	2,149,277	0.2%	0	0	0.0%	23.7%	3.8%
Eisenhower Avenue	18	3,993,203	0.3%	0	0	0.0%	81.2%	18.1%
Farragut North	486	59,571,384	4.9%	1	334,000	2.2%	50.6%	21.7%
Farragut West	442	59,094,493	4.8%	1	334,000	2.2%	50.7%	18.8%
Federal Center SW	26	8,746,837	0.7%	0	0	0.0%	69.7%	8.4%
Federal Triangle	105	23,966,900	2.0%	0	0	0.0%	64.7%	15.9%
Foggy Bottom-GWU	155	22,655,516	1.9%	0	0	0.0%	62.0%	18.8%
Forest Glen	9	111,412	0.0%	0	0	0.0%	0.0%	5.0%
Fort Totten	20	332,568	0.0%	0	0	0.0%	42.9%	13.5%
Franconia-Springfield	0	0	0.0%	0	0	0.0%	--	--
Friendship Heights	95	5,515,148	0.5%	0	0	0.0%	58.8%	18.2%

Metrorail Station Half-Mile Walkshed	Built Prior to 2024			2024 Completions			Percent Built Since Station Opened	2024 Year End Vacancy Rate
	Buildings	Units	Share	Buildings	Units	Share		
Gallery Pl-Chinatown	357	44,907,240	3.7%	1	186,872	1.3%	78.2%	15.5%
Georgia Ave-Petworth	220	1,435,169	0.1%	0	0	0.0%	12.2%	4.9%
Glenmont	18	260,003	0.0%	0	0	0.0%	33.6%	3.7%
Greenbelt	0	0	0.0%	0	0	0.0%	--	--
Greensboro	74	4,474,041	0.4%	0	0	0.0%	2.2%	21.2%
Grosvenor-Strathmore	0	0	0.0%	0	0	0.0%	--	--
Herndon	20	1,181,665	0.1%	0	0	0.0%	0.0%	28.3%
Huntington	13	182,673	0.0%	0	0	0.0%	9.3%	5.2%
Hyattsville Crossing	25	2,737,159	0.2%	0	0	0.0%	41.3%	17.0%
Innovation Center	9	1,102,410	0.1%	0	0	0.0%	0.0%	32.8%
Judiciary Square	261	23,175,045	1.9%	2	301,669	2.0%	72.8%	12.8%
King St-Old Town	261	7,136,085	0.6%	0	0	0.0%	91.2%	27.4%
Landover	7	611,209	0.0%	0	0	0.0%	25.9%	10.0%
L'Enfant Plaza	43	14,054,665	1.1%	0	0	0.0%	72.0%	16.3%
Loudoun Gateway	10	753,678	0.1%	1	303,494	2.0%	0.0%	2.4%
McLean	19	5,003,867	0.4%	0	0	0.0%	46.2%	0.8%
McPherson Square	352	62,021,410	5.1%	0	0	0.0%	59.9%	21.6%
Medical Center	9	661,148	0.1%	0	0	0.0%	2.0%	5.5%
Metro Center	293	48,594,310	4.0%	0	0	0.0%	71.2%	16.7%
Minnesota Ave	60	1,041,073	0.1%	0	0	0.0%	44.3%	3.5%
Morgan Boulevard	0	0	0.0%	0	0	0.0%	--	--
Mt Vernon Sq-7th St-Convention Ctr	375	15,172,696	1.2%	0	0	0.0%	73.3%	14.9%
Navy Yard-Ballpark	62	5,555,878	0.5%	1	9,000	0.1%	85.1%	21.4%
Naylor Road	21	237,212	0.0%	0	0	0.0%	0.0%	0.0%
New Carrollton	14	1,381,163	0.1%	0	0	0.0%	100.0%	36.5%
NoMa-Gallaudet U	81	5,369,181	0.4%	0	0	0.0%	83.0%	8.6%
North Bethesda	56	4,345,748	0.4%	0	0	0.0%	68.2%	10.7%
Pentagon	2	460,502	0.0%	0	0	0.0%	54.7%	0.0%
Pentagon City	18	5,893,539	0.5%	0	0	0.0%	95.5%	24.5%
Potomac Ave	150	1,012,315	0.1%	0	0	0.0%	53.8%	5.5%
Potomac Yard	56	1,167,094	0.1%	1	93,000	0.6%	0.0%	0.2%
Reston Town Center	19	3,040,067	0.2%	1	77,231	0.5%	34.1%	8.5%
Rhode Island Ave-Brentwood	45	890,975	0.1%	0	0	0.0%	50.7%	13.5%
Rockville	108	3,352,897	0.3%	1	12,548	0.1%	69.3%	24.8%
Ronald Reagan Wash. Natl Airport	2	2,514,706	0.2%	0	0	0.0%	0.0%	--
Rosslyn	51	10,786,043	0.9%	0	0	0.0%	64.5%	19.0%
Shady Grove	21	243,458	0.0%	0	0	0.0%	22.9%	1.5%
Shaw-Howard U	504	4,274,211	0.3%	0	0	0.0%	13.8%	4.8%
Silver Spring	150	8,206,891	0.7%	0	0	0.0%	68.1%	21.8%

Metrorail Station Half-Mile Walkshed	Built Prior to 2024			2024 Completions			Percent Built Since Station Opened	2024 Year End Vacancy Rate
	Buildings	Units	Share	Buildings	Units	Share		
Smithsonian	16	5,353,397	0.4%	0	0	0.0%	71.3%	23.0%
Southern Avenue	1	110,000	0.0%	0	0	0.0%	100.0%	--
Spring Hill	39	4,654,452	0.4%	1	3,200	0.0%	28.2%	12.3%
Stadium-Armory	32	916,664	0.1%	0	0	0.0%	52.9%	0.0%
Suitland	9	45,258	0.0%	0	0	0.0%	0.0%	0.0%
Takoma	54	578,713	0.0%	0	0	0.0%	5.1%	11.8%
Tenleytown-AU	127	2,653,392	0.2%	0	0	0.0%	35.1%	7.1%
Twinbrook	79	2,770,555	0.2%	0	0	0.0%	56.5%	20.2%
Tysons	25	5,867,763	0.5%	0	0	0.0%	17.8%	12.5%
U Street/African-Amer Civil War Memorial/Cardozo	446	5,642,617	0.5%	0	0	0.0%	13.1%	3.9%
Union Station	177	16,635,529	1.4%	1	114,797	0.8%	66.8%	14.1%
Van Dorn Street	22	861,394	0.1%	0	0	0.0%	11.3%	3.8%
Van Ness-UDC	31	2,147,828	0.2%	0	0	0.0%	60.9%	36.2%
Vienna/Fairfax-GMU	1	129,941	0.0%	0	0	0.0%	100.0%	--
Virginia Square-GMU	100	4,238,112	0.3%	2	545,576	3.7%	70.2%	15.8%
Washington Dulles Int'l Airport	0	0	0.0%	0	0	0.0%	--	--
Waterfront	29	2,723,824	0.2%	0	0	0.0%	90.5%	6.0%
West Falls Church-VT	1	110,000	0.0%	0	0	0.0%	0.0%	0.0%
West Hyattsville	40	400,422	0.0%	0	0	0.0%	20.3%	2.3%
Wheaton	176	2,092,728	0.2%	0	0	0.0%	27.9%	8.0%
Wiehle-Reston East	36	3,168,194	0.3%	2	337,380	2.3%	23.3%	21.0%
Woodley Pk-Zoo/Adams Morgan	49	1,247,600	0.1%	0	0	0.0%	6.8%	7.5%
DC Station Walkshed Totals	*4,202*	*214,342,117*	*17.5%*	*5*	*932,669*	*6.2%*	*55.3%*	*16.8%*
Maryland Station Walkshed Totals	*1,337*	*49,956,996*	*4.1%*	*1*	*12,548*	*0.1%*	*54.5%*	*19.1%*
Virginia Station Walkshed Totals	*1,116*	*94,346,554*	*7.7%*	*8*	*1,359,881*	*9.1%*	*50.7%*	*19.5%*
Inside Walkshed Total	*6,655*	*358,645,667*	*29.3%*	*14*	*2,305,098*	*15.4%*	*58.1%*	*17.9%*
Outside Walkshed Total	*32,700*	*864,045,784*	*70.7%*	*122*	*12,621,024*	*84.6%*	*74.8%*	*8.7%*
Regional Total	**39,355**	**1,222,691,451**	**100.0%**	**136**	**14,926,122**	**100.0%**	**69.8%**	**11.3%**

Source: CoStar, COG

Half-Mile Walkshed Geography Methodology

The geography used to calculate walkshed totals for Metrorail stations was created by Transportation Planning Board (TPB) staff in 2019. Station areas with more intersections, smaller blocks, and fewer barriers have walksheds with larger total areas. The largest theoretical area is .79 square miles—the area of a circle with a radius of 0.5 miles. Stations areas with higher construction totals could be the result of more construction activity or having a more extensive half-mile walkshed (or both). The analysis was originally performed on walksheds as they existed in 2019 but has since been updated to for newly added stations, including Phase 2 of the Silver Line and the Potomac Yard infill station in Northern Virginia. More information on walksheds can be found on the TPB News blog: Walksheds show planners how easily people can walk to transit.

APPENDIX E

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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