

# Section III: County Profile



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*Indicates that the definition of a word or term may be found in the Glossary of Terms, which starts on page 282.*

# County Profile and Analysis

Understanding who Prince George's County is today and who it is becoming is critical to developing effective policies and strategies to meet the needs of current and future residents.

## REGIONAL CONTEXT

Prince George's County consists of 498 square miles (approximately 320,000 acres). It is bounded by Howard County to the north, Anne Arundel County and Calvert County to the east, Charles County to the south, and Montgomery County, Fairfax County, Virginia, and the District of Columbia to the west (see Map 5).

Prince George's County is located within the Washington metropolitan area, which is home to 5.6 million residents and 3.9 million jobs. The region's strong and diverse economy is fueled by federal spending that has weathered recent recessions and nurtured growing research, commerce, information, and technology sectors.

## MUNICIPALITIES

Prince George's County has 27 incorporated municipalities which help provide a range of critical services for County residents (see Public Facilities Element).

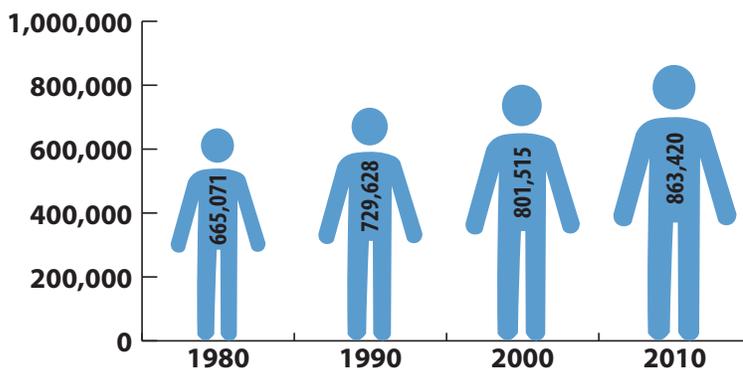
## DEMOGRAPHIC PROFILE

### Population

With an estimated population of 881,130 in 2012, Prince George's County is the third most populous jurisdiction in the Washington metropolitan area, following Fairfax County (1,118,602), Virginia and neighboring Montgomery County (1,004,709).

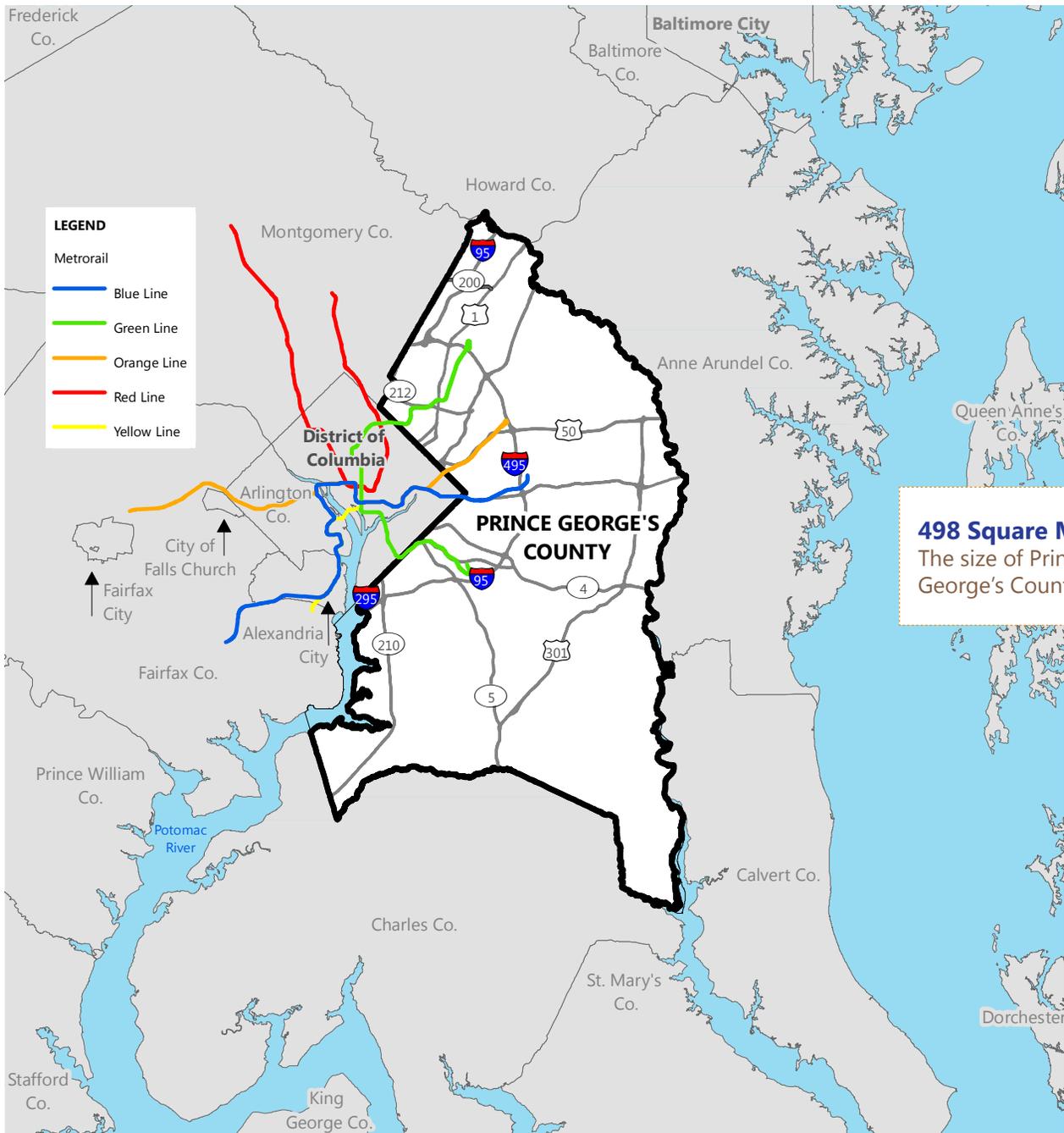
While the County's population increased seven percent between 2000 and 2010 (see Chart 1), its population rate of growth has lagged behind that of its neighbors.

**Chart 1. Population Change in Prince George's County (1980-2010)**



Source: U.S. Census Bureau, 2010

Map 5. Regional Map



**498 Square Miles**  
The size of Prince George's County.

Source: M-NCPPC 2013

## Baby Boomers and Millennials

The U.S. Census Bureau defines the **Baby Boomer Generation** as those born between 1946 and 1964.

The **Millennials** are generally defined as the demographic group born between the early 1980s and the early 2000s.

The County's population is projected to increase by approximately 109,000 residents between 2010 and 2035. Three major population groups—the Millennial, senior, and Hispanic populations—will shape the needs, opportunities, and challenges Prince George's County faces during this period.



**Millennial Population**



**Senior Population**



**Hispanic Population**

## Age

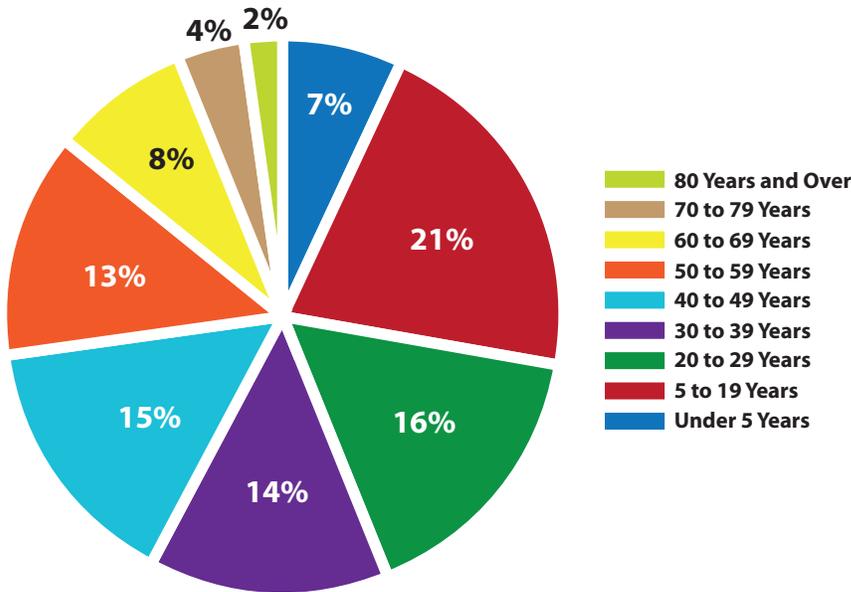
The Prince George's County population is relatively young (see Chart 2). While its median age increased from 33.3 years in 2000 to 34.9 years in 2010, it remained significantly lower than the national median of 37.2 years (U.S. Census Bureau, 2010 Census).

Between 2000 and 2010, the County witnessed noticeable growth in two age groups. The 15 and 29 age group, commonly referred to as the Millennial Generation, steadily grew from 176,177 in 2000 to 202,763 in 2010.

### WHY DOES THIS MATTER?

It matters because the housing preferences of the millennials will—as did those of the baby boomers before them—likely drive the County's and the region's future housing market. The housing needs of this generation relate to affordability, unit size, layout, access to transit and amenities, accessibility, and walkability. While the Millennial Generation now resides overwhelmingly in student and rental housing, in ten years, its housing preferences will shift to starter homes (both rental and homeowner geared towards couples and young families).

**Chart 2. Age Distribution in Prince George’s County**



Source: U.S. Census Bureau, 2010 Census

The 55 to 64 age group, commonly referred to as the Baby Boomer Generation, grew by approximately 30,000 residents or 36 percent. This was more than any other age group in the County. Forecasts indicate that over the next ten years seniors aged 65 years and older will account for the largest population gains in the County.

**WHY DOES THIS MATTER?**

Recent trends show that seniors and the elderly will demand opportunities to age in place and reside in neighborhoods offering smaller, lower-maintenance housing options in walkable and transit-accessible locations.

**43.1 percent** of Prince Georgians in 2010 were 29 years old or younger.

**23.5 percent** of Prince George’s County residents belonged to the Millennial Generation in 2010.

**55 to 64** is the age group that experienced the highest growth rate between 2000 and 2010.



**128,972** was the number of Hispanic residents in Prince George's County in 2010.

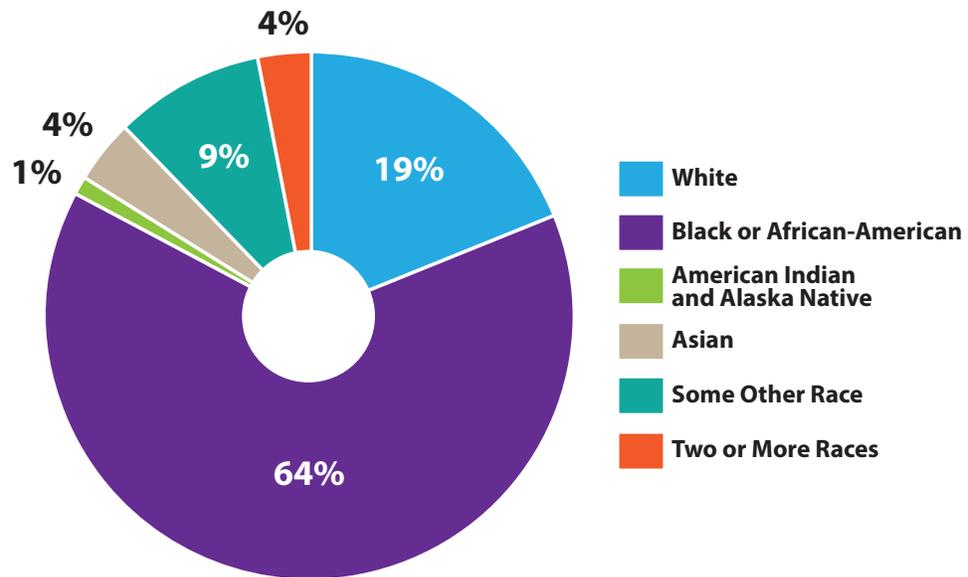
**18 percent higher**  
The median household income in the region was 18 percent higher than in Prince George's County in 2010.

**19 percent** of Prince George's County residents who spoke a language other than English at home in 2010.

## Diversity

Prince George's County's population is racially, ethnically, and culturally diverse. In 2010, 64 percent of County residents were African-American, 19 percent were White, 9 percent were some other race, and 4 percent were Asian (see Chart 3).

**Chart 3. 2010 Racial Make Up of Prince George's County**



Source: U.S. Census Bureau, 2010 American Community Survey

International migration has further diversified the County's makeup accounting for 24 percent of the County's population growth between 2000 and 2010. In 2010, foreign-born residents constituted 20 percent of the County's population, up from 14 percent in 2000.

The fastest growing group is the County's Hispanic population which increased by 126 percent between 2000 and 2010. The majority of Hispanic residents live in communities that lie inside the Capital Beltway, such as Langley Park, East Riverdale, Riverdale Park, Edmonston, and Brentwood.

### WHY DOES THIS MATTER?

It matters because many Hispanic residents share unique socioeconomic characteristics related to their educational attainment, language skills, employment status, household size, and incomes suggesting that targeted policies and strategies may be required to address their needs and concerns.

### Population Density

The County’s most densely populated communities lie inside the Capital Beltway (see Map 6). Higher concentrations of residents are also located in Laurel, Largo, and Bowie.

**WHY DOES THIS MATTER?**

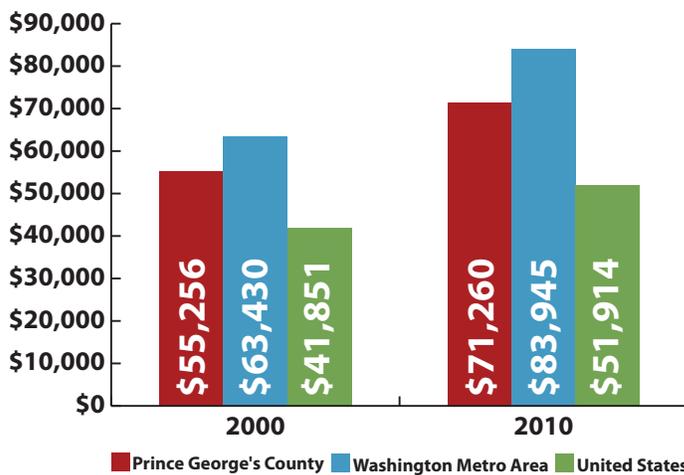
Density,  a reflection of the number of people inhabiting an area, is an important factor in prioritizing public services and amenities, infrastructure investment, and economic revitalization.

### Households

#### Income and Poverty

There were 304,042 households in Prince George’s County in 2010. The median household income for Prince George’s County is higher than the nation’s, but continues to be outpaced by the region’s earnings (see Chart 4).

**Chart 4. Median Household Income in Prince George’s County Compared to the Region and Nation**

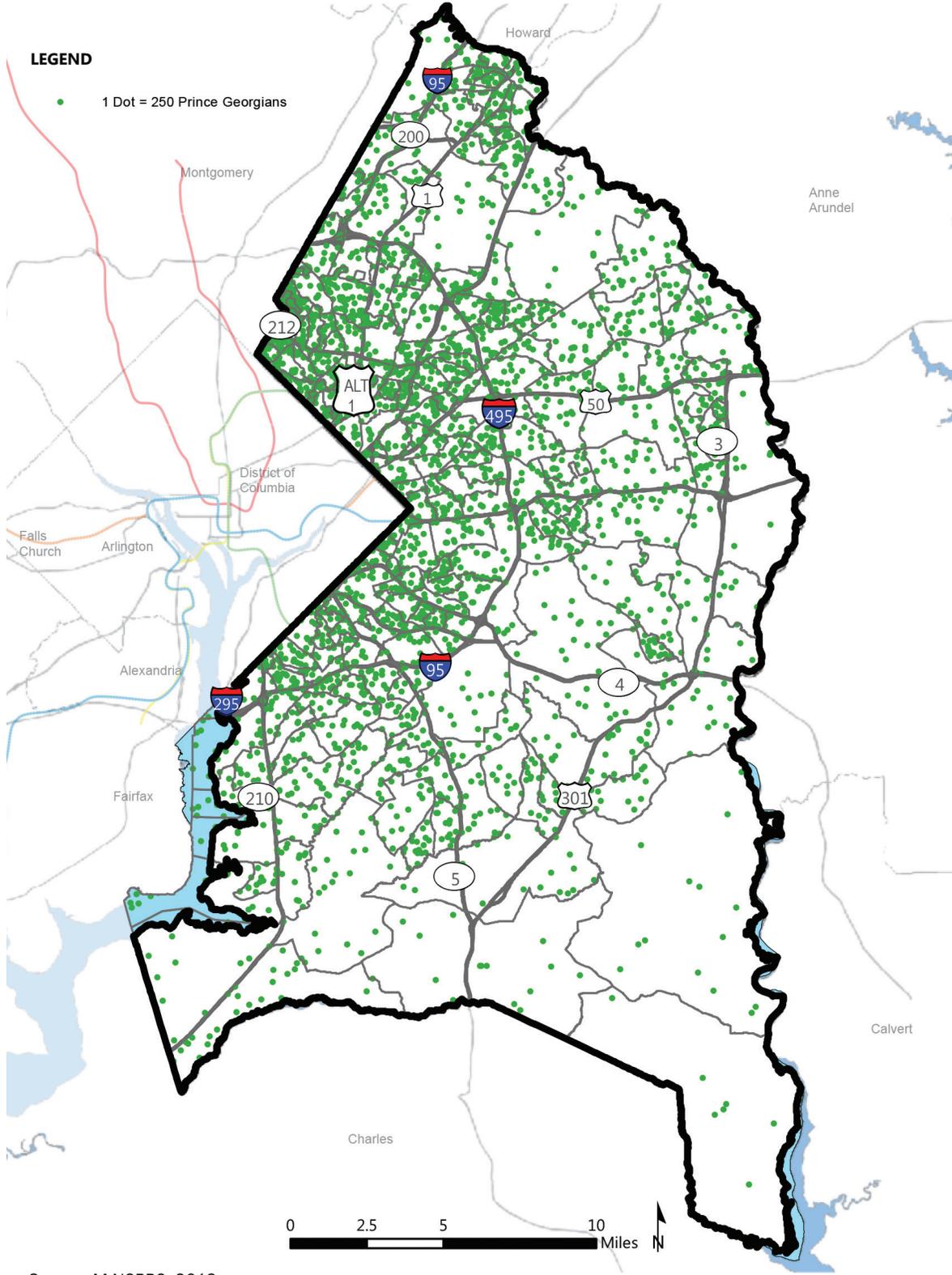


Source: U.S. Census Bureau, 2000 Census and 2006-2010 American Community Survey 5-Year Estimates

Despite rising median household incomes, over 9 percent of County residents lived in poverty in 2010, up from 7.7 percent in 2000. The poverty rate in the County remains higher than in neighboring jurisdictions (see Chart 5).

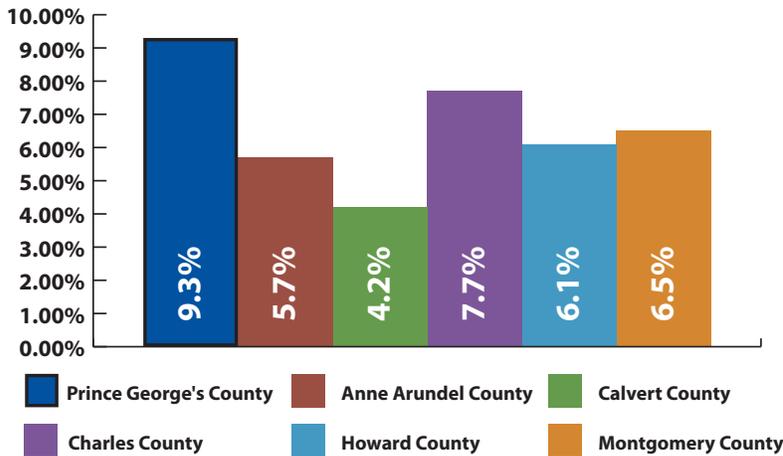
**28,000** is the approximate number of households in Prince George’s County that received cash public assistance or food stamps in 2011.

**Map 6. 2010 Population Density by Census Block**



Source: M-NCPPC, 2013

**Chart 5. 2011 Poverty Rates in Compared to Neighboring Jurisdictions**



Source: U.S. Census Bureau, 2011 American Community Survey

### Household Characteristics

Notable changes between 2000 and 2010 included the decline in married-couple families and households with children under the age of 18. There was an increase in households consisting of people living alone or with unrelated members (referred to as nonfamily households by the U.S. Census Bureau) (see Table 6).

**Table 6. Household Characteristics (2000 and 2010)**

	2000		2010	
	Number	Percent	Number	Percent
Family Households	198,066	69.1	203,520	66.9
Married-couple Families	126,012	44.0	122,000	40.1
Female Householder, No Husband	56,077	19.6	62,001	20.4
With Own Children Under 18 Years	32,410	11.3	30,802	10.1
Nonfamily Households	88,544	30.9	100,522	33.1
Median Household Size	2.74	n/a	2.78	n/a

Source: U.S. Census Bureau, 2000 and 2010 Decennial Census

Approximately one-fifth of the County’s households had a female head of household with no spouse present, as compared to 13.1 percent of households nationwide.

**WHY DOES THIS MATTER?**

It matters because households with a female head of household with no spouse present are more likely to be socioeconomically vulnerable.

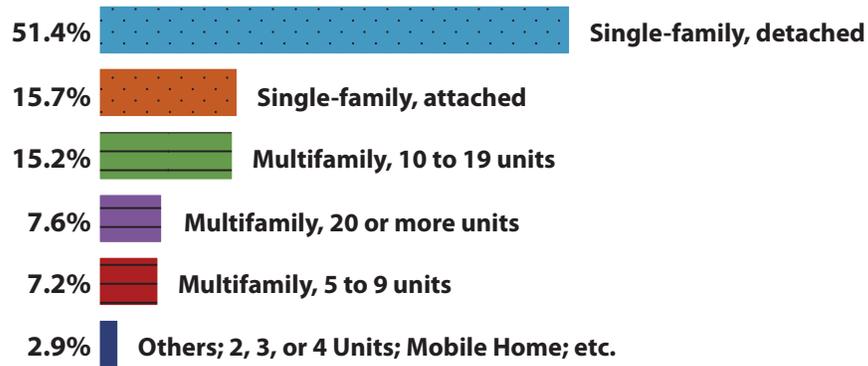
**65 percent** or more of new housing completions in the County between 2002 and 2010 were single-family homes located outside the Capital Beltway.

## Housing

### Types of Units and Tenure

There were 329,855 housing units in the County in 2010; 67 percent of these units were designated single-family (see Chart 6).

**Chart 6. The Types of Housing Units in Prince George’s County**



Source: U.S. Census Bureau, 2010 American Community Survey 1-year Estimates

#### WHY DOES THIS MATTER?

It matters because it exposes a mismatch between the type of housing the County has and the type of housing it will need in the future. The age groups that are projected to experience the greatest growth—the Millennial and Baby Boomer generations—are increasingly interested in transit-accessible, multifamily units, not single-family housing. Over the next 10 to 15 years, the millenials are expected to transition from renting to buying their first homes.

The proportions of housing units in the County that are owner-occupied or renter-occupied remained consistent between 2000 and 2010 with close to two-thirds of the County’s housing stock being owner-occupied (see Table 7).

**Table 7. Housing Tenure and Occupancy (2000 and 2010)**

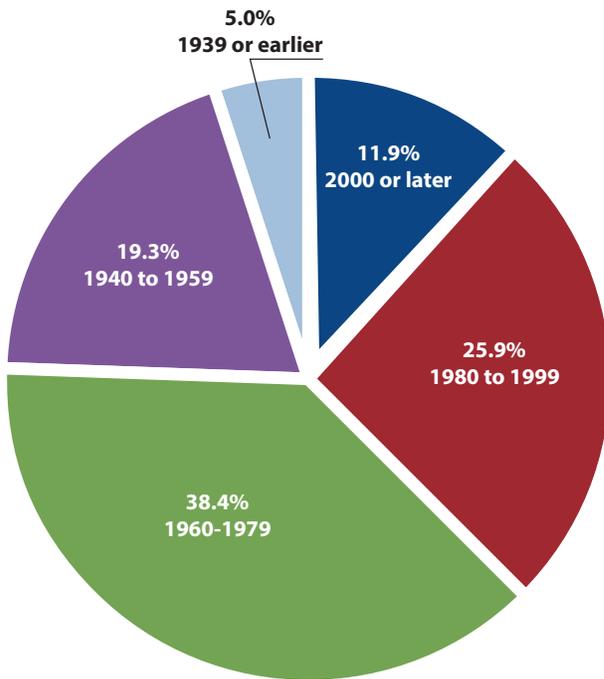
	2000		2010	
Owner-occupied Housing Units	177,177	61.8%	190,993	62.8%
Renter-occupied Housing Units	109,433	38.2%	113,049	37.2%
<b>Total Occupied Housing Units</b>	<b>286,610</b>	<b>100.0%</b>	<b>304,042</b>	<b>100.0%</b>

Source: U.S. Census Bureau, 2000 and 2010 Decennial Census

### Age of Housing Stock

In the County, 24 percent of housing units were built in 1959 or earlier and were more than 54 years old (see Chart 7).

**Chart 7. Year of Construction of Housing Units in Prince George’s County**



Source: U.S. Census Bureau, 2010 American Community Survey 1-year Estimates

#### WHY DOES THIS MATTER?

It matters because older housing units are more likely to require frequent, extensive, and expensive repairs, maintenance, and upgrades.

### Housing Affordability

In 2010, 47 percent of owner-occupied households and 51 percent of renter households in Prince George’s County experienced housing cost burden—defined as spending 30 percent or more of their incomes on housing-related costs.

### Oldest Housing Stock

The majority of the County’s oldest housing stock is located in communities inside the Capital Beltway, such as Capitol Heights, Fairmont Heights, North Brentwood, and Landover.

### Housing Cost Burdens

In 2010, 60 percent of senior renters and approximately 38 percent of senior owner-occupied households, experienced housing cost burdens.



**30.1 percent versus 48 percent**

A comparison of the County's and region's populations 25 years and older who had bachelor's degrees or higher in 2011.

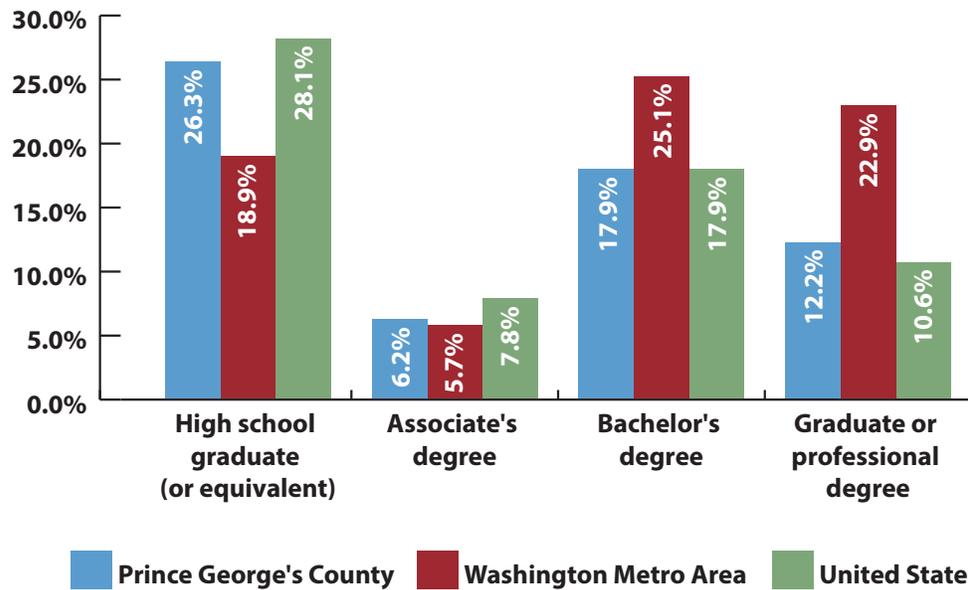


While the seven percent decline experienced by the private sector employment between 2002 and 2012 could be tied to the recent recession, it is important to note that both the State of Maryland and the Washington metropolitan area recorded gains in public and private sector jobs during the same period.

**ECONOMIC PROFILE**  
*Educational Attainment*

Prince Georgians' educational attainment is comparable to the nation's, but lags behind the region's (see Chart 8).

**Chart 8. The Educational Attainment of Prince George's County Residents Compared to the Region and the Nation**



Source: U.S. Census Bureau, 2011 American Community Survey

**WHY DOES THIS MATTER?**

It matters because an important way to increase incomes and create jobs is to ensure that the County's labor force meets the education and skill set requirements of current and future employers. As the U.S. transforms from a manufacturing- to a knowledge- and information-based economy and as the regional economy grows, the demand for a highly educated and skilled labor force is expected to accelerate.

*Employment*

**Regional Share of Employment**

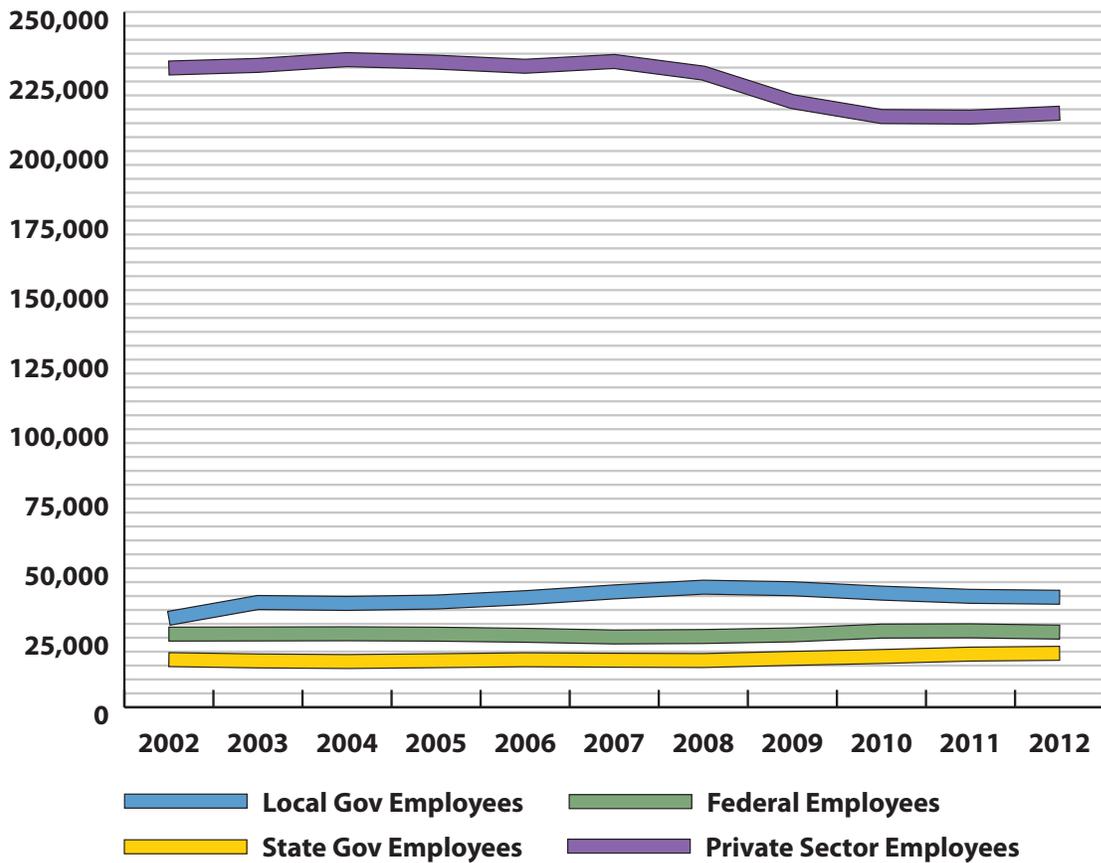
There were approximately 300,000 jobs in Prince George's County in 2012. While the County remains an important contributor to the regional economy, its share of the Washington metropolitan area's employment base has steadily declined from 10.24 percent in 2002 to 8.84 percent in 2012. This

trend helps explain the County’s steadily declining jobs-to-population ratio, a measure of how many jobs there are in the County compared to residents, as well as its commuting patterns (discussed below).

### Private and Public Sector Employment

Seventy-one percent of the County’s labor force was employed in the private sector in 2012 down from 75 percent in 2002 (see Chart 9).

**Chart 9. Prince George’s County Private and Public Sector Employment**



Source: U.S. Bureau of Labor Statistics, Quarterly Census of Employment and Wages 2002-2012 (Preliminary data for 2012)

### Leading Industries

Public sector employment, in conjunction with four of the five largest private sector industries, accounted for over 65 percent of the County’s economy in 2012. These industries generated over 197,000 jobs offering a range of pay scales (see Table 8).

**19.7** is the percentage of growth in the healthcare sector in Prince George's County between 2002 and 2012.

**Table 8. Employees in and Average Wages for Leading Industries (2012)**

Sector	Employees	Average Wages
Federal, State, and Local Government	85,983	\$66,202
Retail Trade (NAICS 44-45)	37,983	\$29,310
Health Care and Social Assistance (NAICS 62)	27,711	\$46,743
Construction (NAICS 23)	24,892	\$60,231
Professional and Technical Services (NAICS 54)	20,624	\$82,493

Source: U.S. Bureau of Labor Statistics, Quarterly Census of Employment and Wages (Preliminary data for 2012)

Between 2002 and 2012, three of the top five sectors experienced employment growth while two declined.

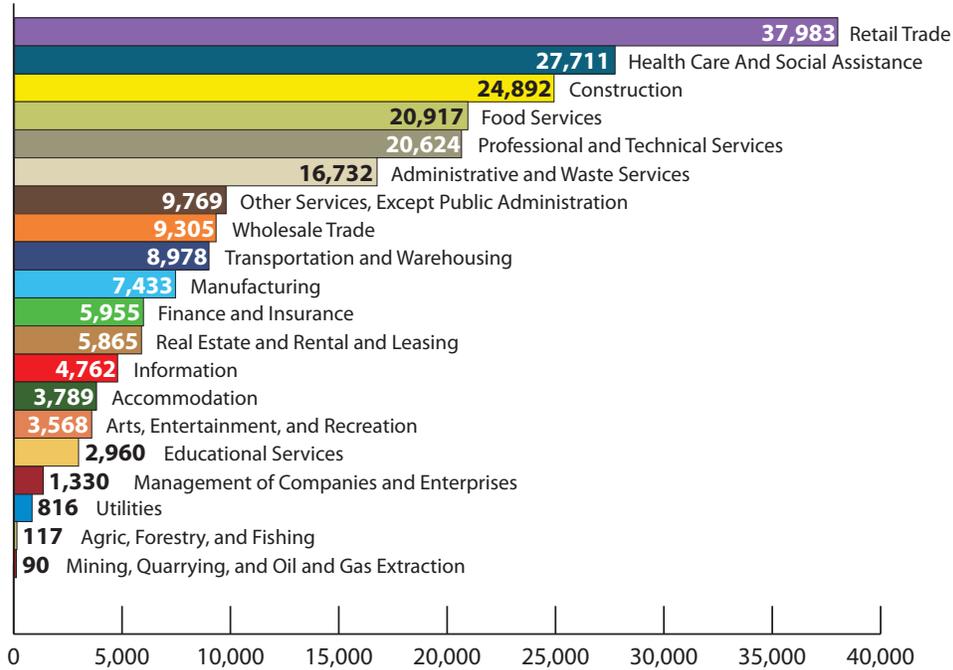
- Healthcare +19.7 percent
- Federal, State, and Local Government +12.7 percent
- Professional, Science, and Technical +7.7 percent
- Construction -8.5 percent
- Retail Trade -5.2 percent

### Other Private Sector Industries

Food Services, Administrative and Waste Services, Manufacturing, Wholesale Trade, Transportation and Warehousing, and Other Services, except for Public Administration, Information industries account for the bulk of the County's other private sector businesses (see Chart 10).



**Chart 10. Prince George’s County Private Sector Industries (2012)**



Source: U.S. Bureau of Labor Statistics, Quarterly Census of Employment and Wages (Preliminary data for 2012)

### Wage Growth

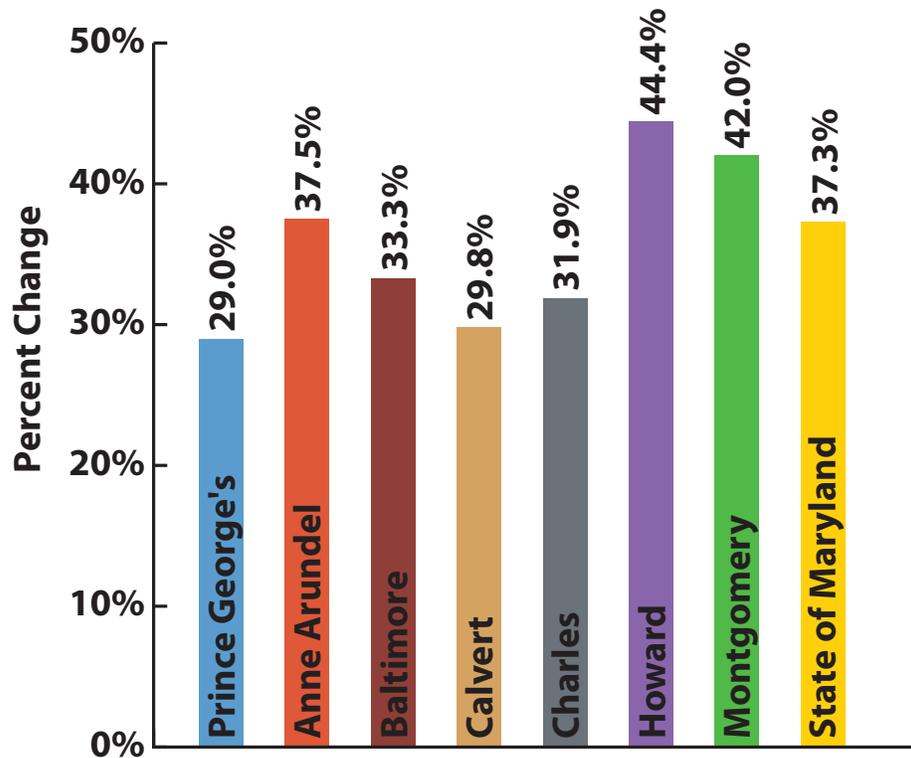
Wages in Prince George’s County have not kept up with wages in neighboring jurisdictions or in the State of Maryland as a whole. While average weekly wages increased 29 percent in the County between 2002 and 2012, in surrounding counties they rose between 29.8 percent and 44.4 percent (see Chart 11). The State of Maryland reported an overall increase of 37.3 percent.



### At the Bottom

Wage increases in Prince George’s County compared to neighboring jurisdictions.

**Chart 11. Changes in Average Weekly Wages: Comparing Prince George's County With Its Neighbors (2002-2012)**



Source: State of Maryland, Department of Labor, Licensing and Regulations, 2002-2012

**6.4 percent versus 7.5 percent**

The County versus the nation's unemployment rate in April 2013.

The **highest rates of unemployment** occur mostly inside the Capital Beltway.

**Labor Force and Unemployment**

The County's labor force was approximately 450,000 strong in 2011. Despite a shrinking labor force—the labor force declined by 1.5 percent between 2008 and 2011—the County's unemployment rate increased from 3.7 to 6.8 percent, an indicator that the County's economy contracted during this period.

**WHY DOES THIS MATTER?**

It matters because a contracting economy underscores the need to prioritize public investment and strategically promote economic growth and development to ensure the County maximizes the impact of its limited resources.

At the same time, it is important to note that the County's unemployment rate has been comparable to that of the Washington metropolitan area and lower than the national average.

### Commuting Patterns

The majority of the County’s workforce commutes to other jurisdictions for work. Currently, 19 percent of residents work in the State of Maryland, but outside of the County, while 42 percent work outside the state, mostly in Washington, D.C., and Virginia.

**WHY DOES THIS MATTER?**

It matters because long commutes are associated with a number of health, financial, and environmental-related costs.

### Commercial Real Estate

The breakdown of the County’s commercial real estate reveals that Prince George’s County supplies a disproportionate share of the region’s industrial land, but commands less than five percent of its office market (see Table 9). The County’s office market has also struggled with high vacancy rates.

**Table 9. Commercial Real Estate in Prince George’s County and Washington Metropolitan Area**

Sector	Prince George’s County		Washington Metropolitan Area		County Share of Metropolitan RBA
	Rentable Building Area (square feet)	Vacancy Rate	Rentable Building Area (square feet)	Vacancy Rate	
Office	26,383,319	19.00%	562,600,402	13.80%	4.7%
Retail	40,635,420	5.70%	287,835,511	5.10%	14.1%
Industrial	49,918,455	8.50%	163,589,021	9.90%	30.5%
Flex	9,761,516	18.30%	68,459,493	14.20%	14.3%

Source: CoStar Realty Information, July 2013

**WHY DOES THIS MATTER?**

It matters because the types of commercial uses, their vacancy rates, and ultimately their value to the County’s economy help inform Plan 2035’s land use  and economic development policy and strategies.

**61 percent** of employed Prince Georgians work outside the County.

**4.7 percent** is Prince George’s County’s share of the region’s rentable office space.

**30.5 percent** is Prince George’s County’s share of the region’s rentable industrial space.

### A development capacity analysis,

sometimes referred to as “build-out analysis” or “buildable lot inventory,” is an estimate of the total amount of development that may be built in an area under a certain set of assumptions, including applicable land-use laws (for example zoning), policies, and environmental constraints. It is a necessary step in planning because it provides a framework to manage future growth.

## COUNTY FORECASTS

### Cooperative Forecast

Prince George’s County uses the “cooperative forecast” when conducting transportation and land use planning and analyzing regional trends. The cooperative forecast is a regional forecast on population, employment, dwelling units, and households developed by the Metropolitan Washington Council of Governments (MWCOCG) with assistance and direction from each of its member jurisdictions, including Prince George’s County.

The MWCOCG forecasts that the Washington, D.C. region will add more than 1 million new jobs and 1.7 million new residents by 2035 and estimates the amount of growth Prince George’s County will capture (see Table 10).

**Table 10. Prince George’s County Round 8.1 Cooperative Forecast**

Year	Population	Employment	Dwelling Units	Households
2010	863,420	342,588	328,182	304,042
2015	881,379	356,958	342,144	323,364
2020	899,712	377,879	355,942	336,404
2025	926,744	403,134	368,850	348,604
2030	950,030	427,514	380,779	359,878
2035	972,926	457,275	391,641	370,144
<b>Change</b>	<b>109,506</b>	<b>114,687</b>	<b>63,459</b>	<b>66,102</b>

Source: MWCOCG, Round 8.1; M-NCPPC, Research Section (Prepared 2/17/12)

### Development Capacity

Based on an analysis of existing zoning and development approvals, Prince George’s County has sufficient residential development capacity to meet the needs of the growth forecasted in Table 10. Utilizing Average Zoning Yields (as of 2011) and approved zoning; areas formerly referred to as the Developed and Developing Tiers can accommodate up to 94, 897 new dwelling units. It also important to remember that residential development capacity can change over time as new zoning regulations or laws enacted, such as the 2012 Sustainable Growth and Agricultural Preservation Act.

### Alternate Forecasts

It is not uncommon for agencies and research groups to develop population forecasts that differ from the official jurisdiction forecast. This may occur due to differences in the time frame and data being analyzed or in the type of forecast model being used. For example, a 2011 study conducted by George Mason University estimated that by 2030 ten percent fewer jobs would be created in the County, but that a comparable number of new dwelling units would be needed (see Table 11).

**Table 11. Amount of Growth Anticipated in Prince George’s County by 2030**

Year	Employment	Dwelling Units
MWCOG	85,000	52,600
GMU Study	76,578	28,286-52,382

Source: MWCOG, Round 8.1; George Mason University



# Assets and Challenges

Identifying and understanding the County's assets and challenges is critical to shaping future growth and development, prioritizing public investment, and implementing change in Prince George's County. Assets are resources that have the potential to produce positive social, environmental, and economic benefits for the County. Conversely, challenges are issues that have the potential to slow the County's progress or move it further away from achieving the vision and goals.

## ASSETS

### *Location, Location, Location!*

Prince George's County is in an enviable position. Linked to the nation's capital by a dense transit and road network (including the I-95/495 and I-295 corridors), it is an important part of the Washington, D.C.'s, robust regional economy. It is positioned to capitalize on the region's large federal presence, diverse workforce, strong educational institutions, and high median incomes. Prince George's County is also strategically located in the State of Maryland between Washington, D.C. and the City of Baltimore. Its location is one of many building blocks for sustained job creation, social equity, and economic prosperity.

### *Federal Hubs*

In 2012 there were approximately 27,000 federal employees and a range of federal facilities in the County. These facilities comprise several large employers, such as Joint Base Andrews (JBA), the IRS, and the U.S. Census Bureau; major research engines, such as NASA Goddard Space Flight Center, the Beltsville Agricultural Research Center, the NOAA Center for Weather and Climate Prediction, and the FDA Center for Drug Evaluation and Research; and other agencies. While an important source of high-paying jobs, Prince George's County has neither captured its proportionate share of federal leases, especially for office space, nor been successful in promoting spin-off development associated with its federal facilities. Several initiatives will help alter these trends. The Defense Base Closure and Realignment (BRAC)

**National Rankings**  
The Washington, D.C. Metropolitan Statistical Area is ranked second after New York in average wages.

### **A Sampling of Federal Agencies in the County**

- Naval Intelligence Support Center
- USDA's Animal and Plant Health Inspection Service
- FDA's Center for Food Safety and Applied Nutrition
- NASA Goddard Space Flight Center
- National Archives and Records Administration
- Department of Health and Human Services, National Center for Health Statistics
- Smithsonian Institute Museum Support Center

activity has directed several thousand new jobs to JBA expanding the base's footprint even further in the County. A HUD Community Challenge Grant has funded the preparation of an action plan to identify market-driven strategies and development incentives to attract federal and spin-office tenants and mixed-income housing along the southern Metro Green Line. The JBA Joint Land Use Study Implementation Committee is working on a range of issues, including how to promote base-related economic development. And lastly, a site adjacent to the Greenbelt Metro Station has submitted a bid to house the new headquarters for the FBI which could bring upwards of 11,000 new jobs to the County.

### *Transit Rich*

The County boasts the second highest number of Metrorail stations in the region—15—in addition to 8 Maryland Area Regional Commuter stations, and 1 Amtrak intercity rail station. To date, we have not capitalized on these valuable assets and actually lost employment around our Metrorail stations between 2004 and 2010. With targeted investment and phased prioritization, we can reverse this trend. Our transit stations have enormous potential to become dynamic, mixed-use transit-oriented communities and job centers generating critical tax revenue for the County, attracting new employers, and retaining the County's recent graduates and budding innovators, investors, and entrepreneurs.

### *Major Infrastructure Investment—the Purple Line*

The proposed 16-mile, \$2.2 billion Purple Line light rail transit system is the largest transportation infrastructure investment in Prince George's County since the Intercounty Connector and the Woodrow Wilson Bridge Improvement project. It is envisioned to have 21 stations, 11 of which are in Prince George's County. As a major new east-west connector between New Carrollton and Bethesda in Montgomery County, it will enhance mobility and reduce travel times for thousands of area residents. It will serve as a critical economic driver by linking existing employment centers to emerging development areas and by leveraging public investment.



**\$3.1 billion** is the amount of property tax revenue generated annually by development around the region's Metrorail stations.

### **Declining TOD** **Employment**

While the areas within one-half mile of the region's transit stations captured 13.8 percent of the metropolitan statistical area employment growth between 2004 and 2010 (excluding Washington, D.C.), Prince George's County actually lost employment around its Metrorail stations during the same period.

### *Economic Catalyst—Regional Medical Center*

The August 2013 decision by Dimensions Healthcare System to construct a new \$650 million regional medical center at the Largo Town Center Metro Station sets the stage for the advancement of the County’s healthcare and life sciences cluster. The center is expected to become a “hotspot” in the County for medical and biopharmaceutical research, health care services, and health-related education and training. It creates an enormous opportunity in one of the Plan 2035’s designated Downtowns to catalyze job growth, attract investment, grow our commercial tax base, and promote transit-oriented development.

### *Figuring out the Why and How—Research Institutions*

Prince George’s County is home to one of the nation’s preeminent research institutions and the flagship of the University System of Maryland—the University of Maryland, College Park. As the largest university in Maryland and in the Washington region, its proximity to the capital and research institutions, such as the Beltsville Agricultural Research Center (BARC), facilitates strong research partnerships with federal agencies, including NASA Goddard Space Flight Center, the National Institutes of Health, and the Department of Homeland Security. Its internationally ranked programs in engineering, bioscience, physical science, and computer science also make it a key driver of Maryland’s burgeoning biotech industry.

BARC—the largest agricultural research complex in the world—conducts research on the production and protection of plants and animals. BARC houses approximately 20 laboratories, including ones dedicated to bee research, crop systems and global change, genetic improvement for fruits and vegetables, and sustainable agricultural systems.

#### **The University of Maryland, College Park**

has produced 400 patents and licensed more than 500 technologies to industry over the past 25 years. As of 2013, the university has generated about 130 invention disclosures annually that have resulted in approximately five tech start-ups each year.

#### *Brain Power*

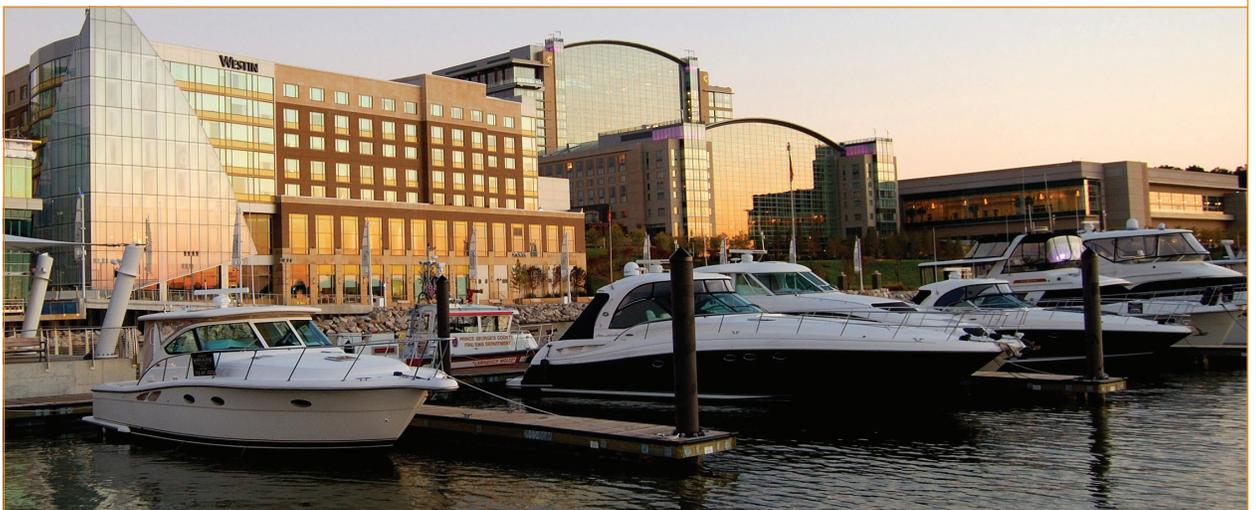
The University of Maryland, College Park, Bowie State University, and Prince George’s Community College annually enroll more than 60,000 students, including 12,000 graduate students. They provide a ready supply of skilled workers to support the growing economies of the County and region. The institutions’ workforce development and cutting-edge academic, continuing education, and apprenticeship programs have played a critical role in fostering core competencies or “know how” in primary industry clusters, such as research, development and engineering, software, and computer services, and biosciences.

### *Emerging Industry Clusters*

Four existing and emerging industry clusters have the potential to accelerate economic growth through spin-off development and job creation in the County. These clusters are in business support services, health care and life science, information, communication, and electronic industries, and federal government leasing opportunities. Six submarkets in the County contain concentrations of these industries. The College Park/Riverdale Park submarket rates highest in terms of its overall and office-specific investment opportunities. The Greenbelt/Berwyn Heights and the Largo–Capital Beltway Corridor submarkets also score well in terms of their office development potential.

### *Welcoming and Diverse Communities*

One of our greatest assets are our diverse communities which range from historic areas (such as Mount Rainier, Riverdale Park, Greenbelt, Glenarden, Bradbury Heights, Fairmount Heights, and Broad Creek) and rural communities (Baden, Croom, and the Town of Eagle Harbor) to suburban subdivisions and master planned communities (including Beechtree, Marlton, Fairwood, Lanham, Landover Hills, Beltsville, and Calverton) and waterfront developments (such as National Harbor). While the US 1 (Baltimore Avenue) corridor and University Town Center have been successful in accommodating more urban lifestyles, Prince George’s County has historically been more effective in meeting the needs and housing preferences of families and those seeking a suburban lifestyle. As is discussed throughout Plan 2035, it is vital that Prince George’s County continue to support its established communities while proactively working to diversify its housing options. By promoting new vibrant, mixed-income and mixed-use, transit-oriented communities and opportunities for residents to age in place, the County will help ensure it retains its upcoming workforce—its recent college graduates—and responds to the needs of its changing demographics, namely its growing senior population.



### *A Beautiful Place to Live—Natural Areas and Trails*

More than 27,000 acres of M-NCPPC-owned parkland, forests, open space, and stream valleys, along with thirteen special conservation areas (SCAs), highlight the breadth of the County's environmental resources and natural places. The SCAs—areas of designated countywide significance—are the Beltsville Agricultural Research Center, Patuxent Research Refuge, Greenbelt National Park, main stem of the Anacostia River, Belt Woods, Suitland Bog, Patuxent River Corridor, Jug Bay complex, Piscataway Park, Mattawoman Creek Stream Valley, Cedarville State Forest and Zekiah Swamp Watershed,  Potomac River Shoreline, and Broad Creek. The County's trail system, important both regionally and locally and over 90 miles long, crisscrosses the County and helps connect these environmental assets. Major trails include the Anacostia Tributary Trail System, Henson Creek Trail, Patuxent Water Trail, WB&A Trail, and Woodrow Wilson Bridge Trail.

### *A Regional Destination—National Harbor*

Strategically located at the I-295 and the Capital Beltway interchange, National Harbor is a 350-acre, mixed-use waterfront development, featuring five hotels, a range of upscale dining and shopping options, Class A office space, and condominiums and townhouses. The site is a major destination and revenue generator in Prince George's County, attracting over eight million visitors a year. It is home to the Gaylord National Resort and Convention Center (the largest hotel in the Washington, D.C., area), and the Tanger Outlets. A new casino is slated to open in 2016. National Harbor generated an average of \$13.2 million per year in tax receipts (split between the hotel and special tax) during fiscal years 2011, 2012, and 2013.

### *Don't Forget about the Industrial Sector*

Industrial activities accounted for 32 percent of the County's employment base or approximately 68,000 jobs in 2013. Established and economically healthy industrial areas, such as Beltsville, Capitol Heights, Cheverly, Landover, Forestville, and Melwood, are vital generators of higher wage jobs with good benefits and upward mobility for residents with lower levels of formal educational. The industrial sector is also important because it is more likely to hire County residents—reducing congestion associated with Prince Georgians commuting outside the County—and accommodates activities critical to county and municipal operations; local start-ups and innovation; and back offices supporting other sectors, such as finance, insurance, and tourism. Expanding the industrial sector into promising new fields, such as the green economy and high-tech, information-intensive sub-sectors, and leveraging its potential as an economic engine are essential to maintaining a diverse and healthy county economy.

### *Our Municipalities—Engines for Revitalization*

There has been a groundswell of revitalization efforts across our municipalities. In partnership with county and state agencies and local nonprofits, Prince Georgians have been pursuing funding, volunteering, advocating, and implementing changes in their neighborhoods, towns, and cities. The following is just sampling of ongoing activities. The City of Greenbelt is developing a pedestrian and bicyclist master plan<sup>66</sup> and a comprehensive wayfinding signage program. The City of College Park is actively enhancing its parks and recreation system, coordinating with the State Highway Administration to improve US 1, and helping local business owners improve their retail spaces and signage. The City of Bowie supports the Bowie Business Innovation Center at Bowie State University, issues annual beautification awards and community outreach grants, and organizes annual stream cleanups. The Town of Fairmount Heights is working with the Neighborhood Design Center to convert an existing roundabout into a vibrant public space.

### *Arts and Entertainment Districts*

Established in 2003, the Gateway Arts District has been a key contributor to the revitalization of the US 1 corridor in Mount Rainier, Brentwood, North Brentwood, and Hyattsville. By supporting local art events, affordable artist workspace and housing, and infrastructure improvements, it has helped revitalize neighborhoods, created jobs in arts-related businesses, and sustained a vibrant arts community in the County. The Gateway Arts District features well-known anchors such as the Arts District Hyattsville, the Prince George's African American Museum & Cultural Center, the Gateway Arts Center managed by the Gateway Community Development Center, and the Mount Rainier Artists' Lofts.



## **CHALLENGES**

### *School Progress*

Quality education is a major concern in Prince George's County where many middle-class families continue to send their children to private schools. The County's public school district is ranked second from the bottom, or twenty-third out of twenty-four in the State of Maryland. Between 2007 and 2010, its high school graduation rates were consistently outpaced by neighboring jurisdictions in the state. During the 2011–2012 school year, only 44 percent of high school graduates were considered college or career ready. Furthermore, 135 of the County's 200 schools were found to contain a student population where 50 percent or more were eligible for free or reduced-price meals.

While worrisome, these statistics obscure significant County progress. More than 27 percent of Prince George's County students earned a passing grade on advanced placement exams during the 2011–2012 school year. This was a 25 percent increase over the previous school year. Absenteeism declined, and more students took college-entrance exams. Even greater gains have been recorded on County proficiency exams. In 2007, 53 percent of eighth-graders passed the Maryland School Assessment exams in reading, and 37.6 percent of the students were proficient in math. Five years later, the County reported double-digit gains in both categories—among the biggest in the State—with 69.6 percent of its eighth-graders proficient in reading and 50.4 percent proficient in math.

The County's economic competitiveness and appeal to future residents will hinge on public and private investment in and commitment to strengthening its public school system and reducing poverty.

### *Crime—Real or Perceived?*

Real and perceived crime are an impediment to growth and development in Prince George's County. When compared to neighboring jurisdictions and the state, overall crime rates in the County are particularly troubling to future residents, employers, and investors. Recent trends, however, reveal marked improvements in the County's public safety record. Between 2006 and 2011, through unprecedented federal, state, and local law enforcement collaboration, Prince George's County has seen a 30.1 percent reduction in total crime. Violent and property crime declined 39.1 percent and 28.6 percent, respectively. In addition, the County experienced significant reductions in homicides (-26.9 percent), rapes (-36.2 percent), robberies (-37.8 percent), aggravated assaults (-40.9 percent), larceny/thefts (-23.5 percent), and motor vehicle thefts (-54.1 percent). Enhancing the County's image will hinge on aggressively promoting this downward trend and marketing its recent public safety improvements.

### *Business As Usual=Sprawl*

Contrary to the 2002 *Prince George's County Approved General Plan's* development objectives and regional trends to cluster employment in transit-accessible urban centers, the majority of recent development in the County occurred in suburban locations outside the Capital Beltway and outside of designated growth centers and corridors. Forecasts predict this undesirable pattern is likely to continue perpetuating sprawl,  constraining economic growth, and straining public resources. There are approximately 17,000 units that have been approved but not yet built (see Map 7). This five-year construction backlog is concentrated outside designated growth centers far from existing transit networks and threatens to cement the County's sprawling

development pattern. The location and magnitude of the pipeline will continue to strain the County's resources and impact Prince Georgians' quality of life, health, mobility options, and economic opportunities.

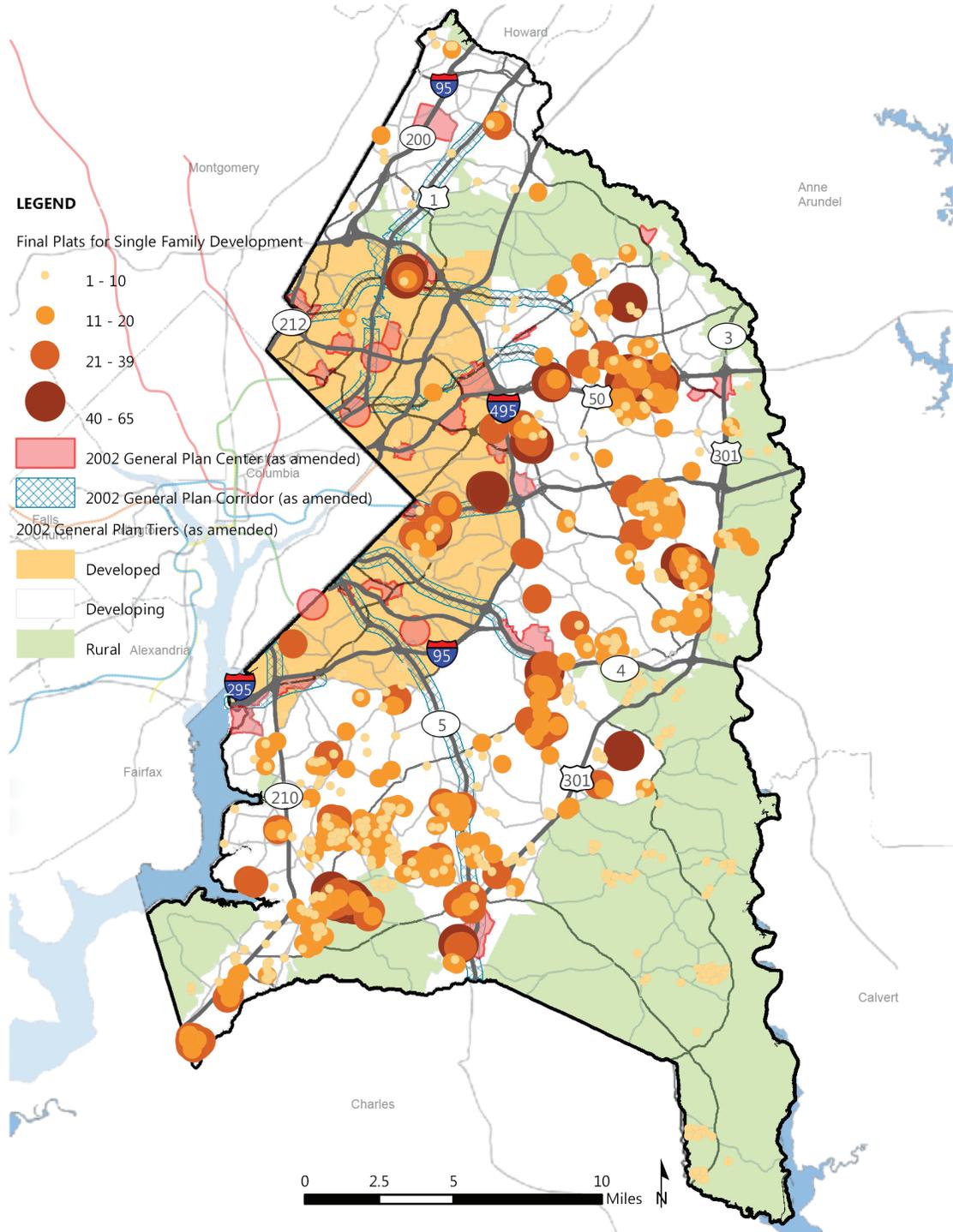
The costs of sprawling development patterns have been the subject of numerous studies. While the methodologies, scale, scope, and purpose of the studies have varied widely, there is general agreement that sprawl is a more costly form of development than compact growth. The tangible costs of sprawl can easily be measured from a financial standpoint. Per capita, geographically dispersed or sprawling development typically requires greater physical infrastructure (such as longer roads and water and sewer extensions), and the provision of public services (namely schools, bus and transit, police, fire, and emergency services) are provided over large geographic areas. In contrast, compact areas, due to the density and intensity of their development, require the construction of less infrastructure and can more easily share existing public services, effectively reducing the extent of road and utility construction maintenance and the number of needed bus routes, police, fire, and emergency medical services stations. Compact areas typically create greater economic activity and more jobs per acre than sprawling development, which generates a higher proportion of tax revenue in relationship to the amount of land that they consume.

### **New Homes in Centers**

Between 2002 and 2010, only 1,900 (8 percent) of 23,798 dwelling units were located in designated centers. Projects, such as Konterra, Westphalia, National Harbor, and subdivisions along US 301 near Upper Marlboro and in the Brandywine/Piscataway area, are expected to continue to propel housing growth outside the Capital Beltway.



### Map 7. Development Pipeline—Final Plats

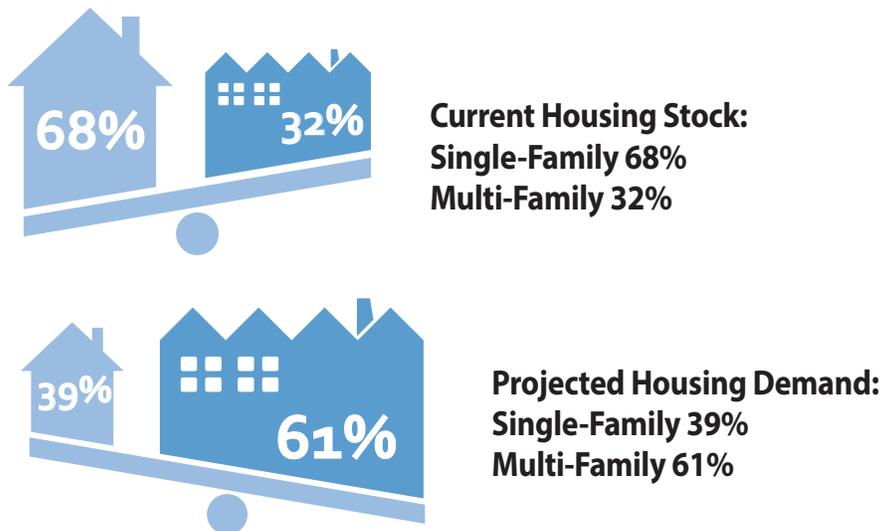


Source: M-NCPPC, 2011

### Housing Stock ≠ Future Demand

Demographic forecasts reveal a looming gap in the County's housing supply (see Chart 12). While only 32 percent of Prince George's housing stock is multifamily, demand for this housing type—driven by the housing preferences of seniors and the Millennial generation (people currently aged 18 to 30)—is projected to reach 61 percent. This housing disconnect is expected to worsen; the overwhelming majority of units in the County's pipeline are single-family. Failure to address this trend will weaken the County's ability to compete for critical new employers and workers.

**Chart 12. Existing Housing Stock and Proposed Housing Will Not Meet Future Demand**



Sources: U.S. Census Bureau, American Community Survey. Lisa Sturtevant and Stephen Fuller "Housing the Region's Future Workforce: Policy Challenges for Local Jurisdictions," George Mason University, Center for Regional Analysis, 2011.

### High Housing Costs+Expensive Commutes=Priced Out

Many County residents find the cost of housing too high even though the County has lower than average rents and home values. High commuting costs, combined with limited transit service and sprawling development patterns outside the Capital Beltway, have further exacerbated the cost of living in the County.

**89 percent** of housing development in the pipeline—defined as development that is approved but not yet constructed—that is single-family in suburban locations.

**5.6 percent** of households in Prince George's County neighborhoods that experienced high housing and high transportation burdens in 2009. This figure was eclipsed only by Washington, D.C. when compared to the values for the region's central jurisdictions—Washington, D.C., Arlington County, and the City of Alexandria—and inner-ring suburbs.

**14 percent** of Prince Georgians have graduate degrees as compared to 25 percent in the Washington, D.C., region.

**45 percent** of all housing units in Prince George's County were built in 1969 or earlier.

### **Bedroom Community**

A bedroom community is a primarily residential suburb that provides few employment opportunities, whose workforce commutes out for employment opportunities each day.

## *Fewer Diplomas and Loss of Skilled Workforce*

Prince Georgians have comparatively lower rates of educational attainment, positioning a disproportionate number of residents for low-wage jobs and dampening the County's appeal to high-tech employers and investors. While Prince George's County continues to grow, it is also faced with a troubling outward migration of its higher-skilled and higher-income residents and recent university graduates.

## *Deteriorating Housing Stock*

The County's housing stock is among the oldest in the Washington, D.C., region and included over 24,140 vacant units in 2010. Vacant and aging homes—concentrated in the County's older communities inside the Capital Beltway—will increasingly require upgrades, repairs, or demolition to ensure the structures are attractive to potential tenants and home buyers and do not trigger further neighborhood decline and disinvestment.

## *Sustaining Existing Communities*

Strengthening and revitalizing the County's 27 municipalities and, in particular, its unincorporated neighborhoods, is also of critical importance to the County's overall wellbeing. The County will need to capitalize on and prioritize investment in its Downtowns and the Innovation Corridor  to generate the revenue necessary to maintain and enhance the schools, public safety facilities, parks, transportation networks, and infrastructure in its existing communities.

## *Forever a Bedroom Community?*

Within the Washington Metropolitan Region, competition is fierce for jobs, new residents, and financial resources. Prince George's County has historically lagged behind the region in private- and public-sector job creation. Compared to neighboring counties, job growth in the County during the past five year period (2007–2012) was among the weakest (see Table 12). The County also struggled to retain jobs during the 2007–2009 recession, recording higher job loss rates than the region and state. Job creation will continue to be weak if recent trends continue.

The County can attract new jobs and increase its commercial tax base by focusing (re)development in walkable communities in transit-accessible locations. Successful pedestrian-oriented, mixed-use communities require a

delicate balance of residential and commercial density to support desired amenities, such as restaurants, retail, recreation facilities, and frequent bus and rail service.

**Table 12. Employment Growth (2007-2012)**

	Change in Employment 2007-2012 (%)
Anne Arundel County, MD	4.9
Calvert County, MD	-2.7
Charles County, MD	2.2
Howard County, MD	5.7
Montgomery County, MD	1.1
Prince George’s County, MD	1.1
Fairfax, VA	5.4

Source: U.S. Bureau of Labor Statistics, LAU Databases

### Our Health Crisis

Many Prince Georgians are in poor health. Compared to their neighbors, they are less likely to exercise, more likely to smoke, and more likely to be overweight or obese.

Many Prince Georgians also do not have convenient access to a range of food options. Approximately 100,000 County residents lived in food deserts in 2010, defined as low-income census tracts where a significant share or number of residents are more than one mile (in urban settings) or ten miles (in rural settings) from the nearest supermarket (Source: USDA). The majority of food deserts (approximately 73 percent) are concentrated inside the Capital Beltway.

### Neglected Environment

Environmental conditions in Prince George’s County—reflected by poor water and air quality—are especially troubling for the well-being of its current and future generations. The County is also faced with the high cost of implementing ambitious greenhouse gas emission reduction, impervious surface retrofit, and stream restoration goals.

#### 5 percent

The percent of regional jobs projected to be generated between 2010 and 2030 and captured by Prince George’s County.

#### 16 out of 24

Prince George’s County health ranking out of 24 Maryland counties.

**71 percent** of all restaurants in Prince George’s County were classified in 2012 as fast food.

**90 percent** of watersheds in Prince George’s County rated as poor or very poor.

## *The Foreclosure Crisis*

Prince George's County was among the jurisdictions hardest hit by the nation's housing foreclosure crisis. Between 2008 and 2011, almost 31 percent of all foreclosures in Maryland occurred in the County. While this troubling statistic dropped to 24.9 percent in 2012—equivalent to 4,265 foreclosure events—the effects of the crisis continue to reverberate throughout the County. High rates of foreclosure have depressed the housing market, destabilized neighborhoods, fueled property neglect and crime, and reduced County tax revenues.

## **CONCLUDING THOUGHTS**

We face many challenges—the sprawling growth patterns of the past, the County's reputation and reality as being a “bedroom community” for the region, rising obesity rates among our residents, weak job growth, impediments to transit-oriented development, significantly degraded waterways and air quality, the effects of the recent foreclosure crisis, and perceptions of crime and underperforming schools. We also have significant assets and opportunities—the University System of Maryland's flagship campus, several preeminent research institutions (including the Beltsville Agricultural Research Center, the Patuxent Wildlife Research Center, and the Goddard Space Flight Center), a planned \$650 million regional medical center, 15 underutilized Metro rail stations, future Purple Line light rail, emerging industry clusters, a model arts district, and ongoing revitalization efforts.

How we chose to address our challenges and capitalize on our strengths today will define our quality of life for decades to come. We have the opportunity to strategically concentrate our investments on targeted areas best suited to mature into strong economic engines and to capture a greater share of the region's job growth. As these targeted areas become successful regional economic drivers, they will generate the commercial tax base we desperately require to meet our needs and the needs of future Prince Georgians. An expanded commercial tax base is critical because it will allow us to upgrade our libraries, parks, and schools, install pedestrian and bicycling facilities, support community health initiatives, and protect our natural resources.



