

Appendices
Upper Marlboro Town Action Plan
Upper Marlboro, Maryland: October 2008

APPENDIX 1: SOCIOECONOMIC ANALYSIS

INTRODUCTION

The following analysis presents the demographic and economic trends and projections for the Town of Upper Marlboro. This data provides the baseline for identifying the overall potential of the town to support new business activity. The demographic and economic analysis presented in this section provides much of the foundation on which the recommendations of this study are based.

This analysis examines trends and projections for the Town of Upper Marlboro and compares them against the largest city within the immediate region, as well as Prince George's County. In the economic trends section, data from Anne Arundel and Calvert Counties were also included. This has been done to create a direct comparison between the local and regional/competitive markets. The data were collected primarily from DemographicsNow, the Bureau of the Census, and the Bureau of Labor Statistics.

POPULATION TRENDS AND PROJECTIONS

POPULATION TRENDS

Despite being the county seat, the Town of Upper Marlboro is very small. Population estimates for 2006 indicate the town had 654 residents. In contrast, the Prince George's County population was estimated at 861,078 people in 2006 (Table 1-1). This is due, in part, to the very small footprint of the town, which is approximately

0.4 square mile in size, and most of this area is already developed. In addition, public uses including the County Administration Building, the courts complex, and the Board of Education property occupy approximately 60 percent of the town's land area.

Since 1990, the town's population has declined slightly, dropping from 694 persons in 1990 to 654 in 2006, reflecting a 5.5 percent decline. Comparatively, population estimates for the City of Bowie and Prince George's County as a whole increased substantially during this time period (34.8 percent and 19.0 percent, respectively). The higher growth rates in both the City of Bowie and the county reflect the

disparity in land availability, as large tracts of land were developed during this time period. As a result, this new rapid growth period drove population changes throughout the county.

Upper Marlboro does, however, benefit from having a disproportionately large daytime employment population. According to interviews with county officials, more than 1,200 public employees are currently employed in Upper Marlboro, most of them county government workers. These officials estimate there are 500 workers in the County Administration Building, 400 workers at the courthouse complex, and more than 250 workers at the Prince George's Board of Education site. Anecdotal data suggest very few of these public positions are filled by town residents.

TABLE 1-1:
Population Trends and Projections
1990-2011

	1990	2000	2006	2011
POPULATION COUNT				
Upper Marlboro	692	648	654	662
Bowie	39,397	50,258	53,097	55,514
Prince George's County	723,558	801,515	861,078	909,670
PERCENT CHANGE IN POPULATION				
		1990-2000	2000-2006	2006-2011
Upper Marlboro		-6.4%	0.9%	1.2%
Bowie		27.6%	5.6%	4.6%
Prince George's County		10.8%	7.4%	5.6%
ANNUAL PERCENT CHANGE IN POPULATION				
		1990-2000	2000-2006	2006-2011
Upper Marlboro		-0.6%	0.2%	0.2%
Bowie		2.8%	0.9%	0.9%
Prince George's County		1.1%	1.2%	1.1%

Source: DemographicsNow and RKG Associates, Inc, 2008

POPULATION PROJECTIONS

The population of Upper Marlboro is projected to increase slightly into the near future, with annual growth rates (0.2 percent) between 2006 and 2011, equaling the pace between 2000 and 2006. This slight growth is consistent with the growth in children in the town described in more detail in the next section. Similar to the disparity in population trends, growth in Bowie and the rest of the county is projected to substantially exceed the town growth rate.

However, new residential development, specifically on the Smith/Clagett property and through redevelopment projects within the town core, will result in a higher rate of growth in Upper Marlboro's population. This additional growth in town would have a positive impact on the marketability of Upper Marlboro as a place to do business, bringing additional potential patrons in town for a local business.

POPULATION BY AGE

The Upper Marlboro population is aging at a significant rate, as the median age increased from 29.6 in 1990 to 41.1 in 2006 (Table 1-2). In fact, residents aged 45 years to 65 years and those over 65 years experienced the largest increase as a share of the town's population from 1990 to 2006, increasing by 16.6 percent and 7.4 percent percentage points. Comparatively, those aged 20 to 44 declined from 64.3 percent of the town's population to only 32.7 percent in just 16 years. This trend may have long-term implications for Upper Marlboro if the town cannot recapture persons in this age group. Typically, persons age 20 to 44 are establishing their careers and families during this period. They are often active in civic leadership, local schools, and contribute to the vibrancy of a community. Without the

formation of young family households, Upper Marlboro may struggle to sustain its population in the future.

However, the town also experienced a slight increase in persons under 20 years old. Children and teens account for 7.6 percent more of the town's population in 2006 than they did in 1990. This growth in the town's youth likely indicates that families and households with children are occupying housing units in town as older households are moving out. As such, this trend should be followed carefully, as continued turnover from empty-nester households family households may change the long-term outlook for retail and service businesses in Upper Marlboro.

The population of the City of Bowie and the county as a whole has aged, albeit at a slower rate. The median age in Bowie increased from 32.5 to 37.7 years and the median age of the county increased from 30.8 to 34.7 years during the study period. This disparity further demonstrates the impacts new development has on demographic trends. The lack of newer housing in the town, combined with limited housing variety, has likely attracted older, more established persons, while discouraging younger persons who are either not interested or ready to purchase a home.

TABLE 1-2:
Population by Age
1990-2011

	1990	2000	2006	2011
UPPER MARLBORO				
Under 20	16.8%	21.8%	24.5%	23.8%
20 to 44	64.3%	36.8%	32.7%	30.0%
45 to 65	13.8%	27.3%	30.6%	31.8%
Over 65	4.9%	11.0%	12.3%	14.2%
Median Age	29.6	38.8	41.1	42.7
BOWIE				
Under 20	27.1%	20.0%	28.6%	27.8%
20 to 44	43.7%	38.5%	34.9%	32.9%
45 to 65	23.0%	23.1%	25.9%	27.2%
Over 65	6.2%	9.4%	10.6%	12.4%
Median Age	32.5	36.3	37.7	38.7
PRINCE GEORGE'S COUNTY				
Under 20	27.8%	20.9%	29.6%	29.7%
20 to 44	47.0%	40.3%	36.5%	34.0%
45 to 65	18.3%	22.1%	25.0%	28.6%
Over 65	6.9%	7.7%	8.9%	10.7%
Median Age	30.8	33.3	34.7	35.9

Source: DemographicsNow and RKG Associates, Inc, 2008

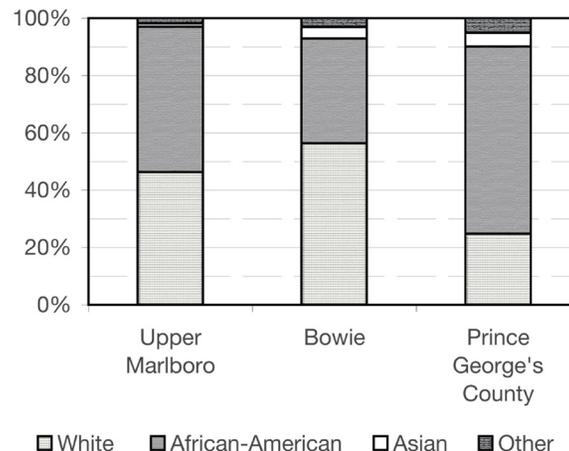
Projections indicate the median age of residents in Upper Marlboro will continue to increase through 2011. This finding is consistent with local and regional trends, as the baby boomer population continues to enter its retirement years. Interestingly, children and teens are projected to account for a smaller share of the town population in 2011 despite the growth since 1990. The continued aging in place of long-time residents combined with the gradual turnover from empty nesters to traditional families indicate there may be opportunities to serve both a growing older and younger market in town. On one hand, this provides flexibility in business recruitment and retention. On the other hand, there is potential for competing interests in town, as the mix of long-term residents and new residents continues to even out.

RACIAL COMPOSITION

Upper Marlboro as evolved into an ethnically diverse community. Since 1990, the white population has steadily declined while the African-American population has increased its share of the population. As a result, the share of population for each group has drastically changed, as African-Americans have become the majority in town. Estimates for 2006 indicate that African-American residents account for 50.7 percent of the town's population. White residents account for 46.3 percent (Figure 1-1).

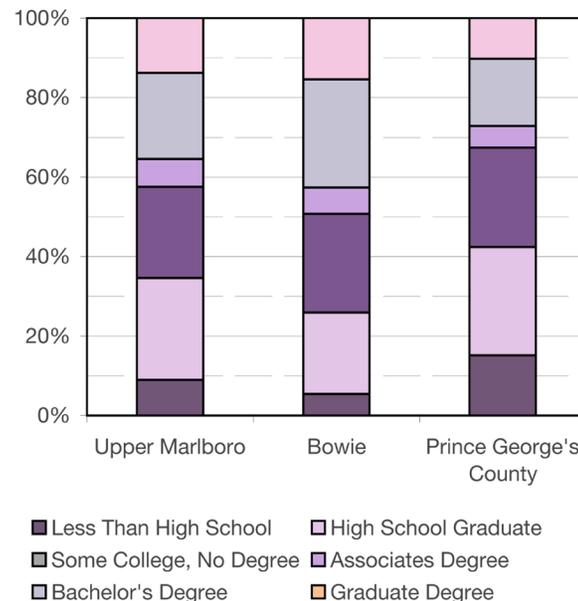
The African-American population also experienced significant growth locally and countywide as well. The growth of African-American residents in Bowie has been substantial, as the African-American population increased from 7.5 percent in 1990 to 30.6

FIGURE 1-1:
Racial Composition Comparative Analysis; 2006



Source: DemographicsNow and RKG Associates, Inc, 2007

FIGURE 1-2:
Education Attainment Comparative Analysis; 2000



Source: DemographicsNow and RKG Associates, Inc, 2007

percent in 2006. In 2006, more than 65 percent of Prince George's County's population was African-American. It is important to note that the Asian population has increased in the county, accounting for approximately 4.0 percent of the county and City of Bowie total. However, Upper Marlboro remains almost exclusively a white and African-American community. Projections indicate the African-American population in Upper Marlboro will continue to increase as a share of the town's population into the near future. This trend is consistent for the county as well.

EDUCATION ATTAINMENT

Education attainment data is reported for persons aged 25 years and above. This analysis provides insight into the employability of local residents in different types of jobs. A comparison with local and regional attainment numbers further defines the unique characteristics of Upper Marlboro.

Within Maryland, residents of Upper Marlboro are fairly well educated, as the education attainment levels of local residents are higher than the county as a whole or the state. However, there are other areas of Prince George's County that have high concentrations of well-educated people, such as Bowie.

In Upper Marlboro, 35.4 percent of the population have a Bachelor's Degree or higher. In comparison, only 27.2 percent of the county (as a whole) and 31.5 percent statewide have similar education levels. Almost 43 percent of Bowie residents have at least a four-year college degree. Conversely, approximately 26 percent of town residents had only a high school degree or

TABLE 1-3:Household Trends and Projections
1990-2011

	1990	2000	2006	2011
HOUSEHOLD COUNT				
Upper Marlboro	238	292	294	297
Bowie	13,417	18,185	19,247	20,175
Prince George's County	255,750	286,610	307,925	325,667
PERCENT CHANGE IN HOUSEHOLDS				
Upper Marlboro		23.7%	0.7%	1.0%
Bowie		35.5%	5.8%	4.8%
Prince George's County		12.1%	7.4%	5.8%
ANNUAL PERCENT CHANGE IN HOUSEHOLDS				
Upper Marlboro		2.7%	0.1%	0.2%
Bowie		3.6%	1.0%	1.0%
Prince George's County		1.2%	1.2%	1.2%

Source: DemographicsNow and RKG Associates, Inc, 2008

less. The totals are 42.4 percent for the county (as a whole), 42.1 percent for the state, and 25.9 percent in Bowie.

HOUSEHOLD TRENDS AND PROJECTIONS

HOUSEHOLD FORMATION TRENDS

According to the U.S. Census, Upper Marlboro experienced a growth in households during the 1990s. The town's total households increased by more than 23 percent during this time period, slightly faster than the county as a whole but below the City of Bowie (Table 1-3).

Upper Marlboro's current slow growth contrasts with the strong growth occurring outside the town in the remainder of Prince George's County. The county experienced a 12 percent growth in households during the 1990s and an additional 7.4 percent growth since 2000. Growth in Bowie has been equally strong, particularly during the 1990s (35.5 percent). This disparity primarily is due to the lack of land in Upper Marlboro to build new housing. Other than the Smith/Clagett site, there are no large undeveloped

parcels in the town. Discussions with owners of the site suggest development may be far off. In any case, the continued development of undeveloped sites throughout the rest of the county has given a substantial boost to Prince George's County in terms of new households. This growth is evident in areas surrounding Upper Marlboro, where approximately 350 units have been built since 2002, and an additional 1,000 housing units are in the planning stages within two miles of the town.

HOUSEHOLD FORMATION PROJECTIONS

Total households in Upper Marlboro are projected to remain stable through 2011. The stagnant household growth is consistent with the slow rate of population growth that is projected to occur over the same time period. As mentioned previously, the lack of development parcels has a greater impact on the town's growth rate than migration patterns. As such, any new residential development in town likely would result in positive growth of both population and household formation. This is evident in the projections for the City of Bowie and the county as a whole. Both study areas are projected to experience strong household growth (4.8 percent and 5.8 percent, respectively). Based on these findings, it is reasonable to conclude that new residential development within Upper Marlboro would attract interest from potential residents.

Continued household growth, whether in Upper Marlboro or on the outskirts of the town, will result in increased demand for retail goods and services. The town could benefit from this new demand if the appropriate types of businesses are recruited into the town core. However, the level of success in attracting these retailers, and

therefore purchases, are largely dependent upon issues such as building façade enhancements, streetscaping and transportation improvements as much as a formal marketing and recruitment campaign.

HOUSEHOLD SIZE TRENDS

Upper Marlboro has experienced a substantial decrease in average household size. As Upper Marlboro's population continues to age, more "empty-nester" households are created as children grow and leave for college or to start their own families. In fact, the large decrease in household size that occurred from 1990 to 2000 is consistent with the large increase of population of those over 65 and the decline in persons age 20 to 44 (a.k.a. family households) during this same time period.

The decrease in household size is a trend found not only in Upper Marlboro, but has also been experienced on a regional level. Both the City of Bowie and Prince George's County have experienced a similar decline in household size, albeit at a slower rate than in Upper Marlboro.

MEDIAN HOUSEHOLD INCOME TRENDS AND PROJECTIONS

MEDIAN HOUSEHOLD INCOME TRENDS

Generally, incomes in all three jurisdictions are rising (Table 1-4). The share of those earning over \$100,000 in Upper Marlboro has increased 5.8 percentage points since 2000. The City of Bowie experienced an 11.7 percentage point increase and Prince George's County experienced a 7.2 percentage point increase during the same time period.

Currently, the Town of Upper Marlboro has a median household income of \$69,788 (Figure 1-3). In comparison, the City of Bowie has a median household income of \$88,895 and Prince George's County has a median household income of \$63,283. Income tends to correlate strongly with education attainment and occupation. As such, the income level data for Upper Marlboro is relatively consistent with the current education attainment levels. On a national basis, median household incomes levels (\$51,680) are considerably lower than the town or the region.

MEDIAN HOUSEHOLD INCOME PROJECTIONS

Similar to population and household projections, median household income growth is projected to slow into the near future. For example, the number of households in Upper Marlboro earning over \$100,000 are projected to increase 3.4 percentage points through 2011, which is slightly slower than the rate between 2000 and 2006 (5.8 percent). However, those earning \$50,000 to \$100,000 is projected to increase 3.0 percent through 2011; thereby reversing a 1 percent decline that occurred from 2000 to 2006. Though income growth is generally slowing, it will still remain relatively high and as such, there is opportunity for retail and service establishments that offer higher-end goods to locate to Upper Marlboro (discussed in more detail in the Retail Market Analysis chapter).

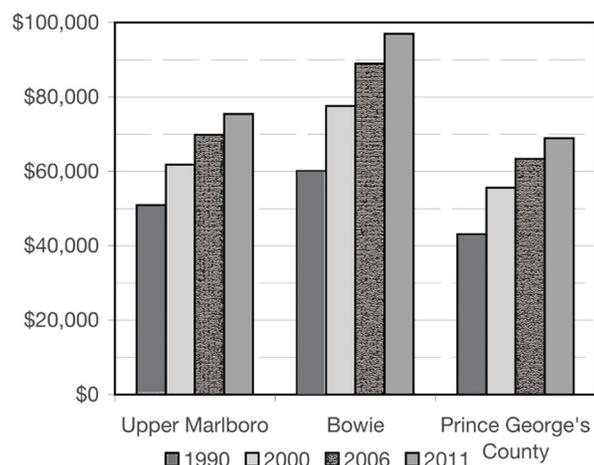
The City of Bowie is projected to experience large growth in those earning over \$100,000 through 2011 (6.9 percent increase). Although those households earning \$50,000 to \$100,000 is projected to decrease 4.8 percent, the increase in those earning over \$100,000 off-sets this

TABLE 1-4:
Households, by Income Level
1990-2011

	1990	2000	2006	2011
UPPER MARLBORO				
Under \$25k	8.2%	10.0%	8.7%	7.9%
\$25k to \$50k	40.7%	24.8%	21.3%	15.6%
\$50k to \$100k	45.5%	40.2%	39.2%	42.2%
Over \$100k	5.6%	25.0%	30.8%	34.2%
BOWIE				
Under \$25k	7.4%	5.4%	4.4%	4.0%
\$25k to \$50k	27.5%	17.2%	13.6%	11.8%
\$50k to \$100k	55.0%	48.4%	41.2%	36.5%
Over \$100k	10.1%	29.1%	40.8%	47.7%
PRINCE GEORGE'S COUNTY				
Under \$25k	21.7%	16.1%	13.8%	12.7%
\$25k to \$50k	37.6%	28.1%	24.0%	21.8%
\$50k to \$100k	35.2%	38.8%	38.1%	36.8%
Over \$100k	5.5%	17.0%	24.1%	28.8%

Source: DemographicsNow and RKG Associates, Inc, 2008

FIGURE 1-3:
Median Household Income Comparative Analysis;
2006



Source: DemographicsNow and RKG Associates, Inc, 2007

decline. Prince George's County is projected to see a more modest increase in those earning over \$100,000 (4.6 percent). Those earning between \$50,000 and \$100,000 are projected to decrease 1.3 percent through 2011.

HOUSING SUPPLY CHARACTERISTICS

HOUSING UNITS

Between 1990 and 2000, Upper Marlboro experienced an expansion of the housing supply. In total, the town saw the construction of an additional 67 housing units, for a 27.2 percent increase in the existing supply (Table 1-5). The number of household formations increased by a total of 56 during this time period.

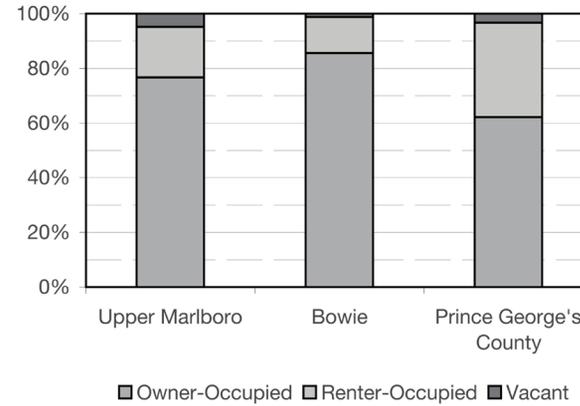
The City of Bowie and Prince George's County also experienced an increase in housing units from 1990 to 2000. The City of Bowie experienced a faster increase in housing units than Upper Marlboro (37.3 percent); however the County as a whole experienced a slower increase in housing units (12.9 percent) during this time period.

In contrast, Upper Marlboro housing unit development experienced a minor decrease from 2000 to 2006. The number of housing units decreased from 313 units in 2000 to 309 units in 2006. It should be noted that both the City of Bowie and Prince George's County are much larger land areas than the Town of Upper Marlboro, and therefore have more growth potential.

Projections indicate that housing unit development in Upper Marlboro will remain

relatively flat. However, development of the Smith/Claget property and residential infill sites could increase the number of housing units above what is projected by DemographicsNow. In the City of Bowie, the growth in housing units is projected to increase 4.4 percent through 2011. Housing units in the county as a whole is projected to increase at a slightly higher rate (5.3 percent). This projection indicates that housing unit development in the region will remain strong into the future. As mentioned previously, there is an opportunity for Upper Marlboro to capitalize on the increased regional growth and increase the amount of supportable retail and service square feet.

FIGURE 1-4:
Housing Units Comparative Analysis; 2006



Source: DemographicsNow and RKG Associates, Inc, 2007

TABLE 1-5:
Housing Units, by Type
1990-2011

	Percent				Percent Change		
	1990	2000	2006	2011	90-'00	00-'06	06-'11
UPPER MARLBORO							
Owner-Occupied	83.3%	73.5%	78.7%	78.8%	-11.6%	4.4%	2.4%
Renter-Occupied	12.2%	19.6%	18.4%	17.9%	62.1%	-8.8%	-3.2%
Vacant	4.5%	6.7%	4.9%	3.6%	50.0%	-27.6%	-26.4%
Total Units	246	313	309	308	27.2%	-1.3%	-0.3%
BOWIE							
Owner-Occupied	82.9%	83.3%	85.6%	86.0%	0.4%	2.8%	0.5%
Renter-Occupied	15.6%	14.0%	13.2%	13.1%	-10.4%	5.8%	0.5%
Vacant	1.5%	2.8%	1.3%	0.9%	87.5%	-53.8%	-29.3%
Total Units	13,615	18,700	19,495	20,353	37.3%	4.3%	4.4%
PRINCE GEORGE'S COUNTY							
Owner-Occupied	56.2%	58.6%	62.1%	64.6%	4.9%	6.0%	4.0%
Renter-Occupied	39.3%	36.2%	34.6%	33.3%	8.0%	4.5%	3.8%
Vacant	4.5%	5.2%	3.3%	2.2%	-6.4%	-35.8%	-34.8%
Total Units	267,742	302,378	318,572	332,944	12.9%	5.4%	4.5%

Source: DemographicsNow and RKG Associates, Inc, 2008

HOUSING OCCUPANCY

The data in Table 1-5 also presents the change in tenure, which denotes owner- versus renter-occupied housing, for the study area jurisdictions from 1990 to 2011. In addition, the table identifies vacancy rates for both segments of the housing market. As of 2006, approximately 76.7 percent of the total units in Upper Marlboro were owner-occupied units and 18.4 percent were renter-occupied units. Approximately 4.9 percent of the total units were vacant. The City of Bowie had a higher proportion of owners (85.6 percent) than Upper Marlboro, however, the county as a whole has a lower proportion of owners (62.1 percent) in 2006 (Figure 1-4). Nationally, the percentage of homeownership approaches 69 percent.

The percentage of owner-occupied housing is closely correlated with income and age. Typically, persons with higher income levels tend to have a higher rate of home ownership. Though Upper Marlboro is comparatively small in population, the relatively high rate of ownership indicates there is a higher income consumer base that can support retail or service establishments.

Projections for Upper Marlboro indicate the amount of owner-occupied units may increase slightly (2.4 percent) through 2011. Another factor that contributes to the town's higher homeownership rate is the lack of housing alternatives such as multifamily housing.

The City of Bowie and Prince George's County may also experience an increase in owner-occupied units. Projections indicate the City of Bowie may increase 0.5 percent in owner-occupied units and the county as a whole may

increase 4.0 percent in owner-occupied units through 2011. All three jurisdictions are also projected to decline in the number of vacant units. The decline in vacancy and growth in households could provide further support for additional retail or service square footage in the town.

EMPLOYMENT AND ESTABLISHMENT TRENDS

Employment and establishment trends were analyzed to help gain a fuller understanding of the industries that have experienced growth in the recent past and therefore may be ideal industries to focus recruitment efforts on. The employment and establishment data were collected from the U.S. Census Bureau's County Business Patterns (CBP). The CBP database is an annual series that provides employment and establishment growth trends data by industry.

TABLE 1-6:
Employment Trends, by Major Industry Classifications
Prince George's County; 1998-2005

NAICS	Description	1998	2005	Change	% Change
-----	Total	243,126	262,831	19,505	8.0%
44	Retail Trade	37,864	39,742	1,878	5.0%
23	Construction	27,863	35,257	7,574	27.4%
54	Professional, Scientific, and Technical Services	24,701	30,713	6,012	24.3%
62	Health Care and Social Assistance	22,222	25,425	3,203	14.4%
56	Administrative and Support and Waste Management and Remediation Services	22,526	23,291	765	3.4%
72	Accommodation and Food Services	19,729	21,930	2,201	11.2%
42	Wholesale Trade	14,264	15,428	1,144	8.0%
81	Other Services (except Public Administration)	15,262	14,548	(714)	-4.7%
31	Manufacturing	12,116	10,541	(1,575)	-13.0%
51	Information	8,304	9,351	1,047	12.6%
52	Finance and Insurance	9,091	8,919	(178)	-2.0%
48	Transportation and Warehousing	8,467	8,690	223	2.6%
53	Real Estate and Rental and Leasing	5,315	6,463	1,448	28.9%
55	Management of Companies and Enterprises	7,770	4,313	(3,457)	-44.4%
71	Arts, Entertainment, and Recreation	2,920	3,938	1,018	34.9%
61	Educational Services	2,793	3,400	607	21.9%
22	Utilities	858	548	(310)	-36.1%
21	Mining	272	375	103	37.9%
11	Forestry, Fishing, Hunting, and Agriculture Support	10	38	28	280.0%
99	Unclassified	175	21	(154)	-88.0%
95	Auxiliaries (exc. corporate, subsidiary & regional mgt)	1,164	0	(1,164)	-100.0%

Source: US Census Bureau and RKG Associates, Inc, 2007

TABLE 1-7:

Largest Employment Shifts
Prince George's County; 1998-2005

NAICS	Description	1998	2005	Change	% Change
LARGEST NET GAIN					
235	Special trade contractors	19,460	26,580	7,100	36.5%
541	Professional, Scientific, and Technical Services	24,701	30,713	6,012	24.3%
722	Food Services and Drinking Places	17,069	19,926	2,854	16.7%
824	Social Assistance	3,869	5,202	1,533	41.8%
531	Real Estate	3,480	4,922	1,442	41.4%
LARGEST NET LOSS					
561	Management of Companies and Enterprises	7,770	4,013	(3,757)	-48.4%
492	Couriers and Messengers	5,208	4,104	(1,104)	-21.2%
462	General Merchandise Stores	6,463	5,461	(1,002)	-15.5%
323	Printing and Related Support Activities	4,060	3,066	(994)	-24.5%
334	Computer and Electronic Product Manufacturing	1,784	955	(829)	-46.5%
LARGEST PERCENTAGE GAIN					
336	Transportation Equipment Manufacturing	10	467	457	4570.0%
493	Warehousing and Storage	73	932	919	1258.9%
321	Wood Product Manufacturing	10	131	121	1210.0%
487	Scenic and Sightseeing Transportation	10	129	119	1190.0%
333	Machinery Manufacturing	51	450	299	588.0%
LARGEST PERCENTAGE LOSS					
331	Primary Metal Manufacturing	175	75	(100)	-57.1%
561	Management of Companies and Enterprises	7,770	4,013	(3,757)	-48.4%
334	Computer and Electronic Product Manufacturing	1,784	955	(829)	-46.5%
311	Food Manufacturing	1,434	794	(640)	-44.6%
221	Utilities	858	548	(310)	-36.1%

1- Minimum of 100 Employees

Source: US Census Bureau and RKG Associates, Inc, 2008

In order to identify growth trends for the Upper Marlboro study area, the consultant team collected data for the years 1998 and 2005. In 1998, the Census Bureau switched to the North American Industry Classification System (NAICS). As such, data prior to this date are not compatible with the most recent information. The most recent data at the time of this analysis was 2005 information. It is important to note that some of the CBP data is suppressed by the

Census Bureau due to confidentiality issues. In these cases, the consultants estimated employment numbers by using averages that fell into the ranges provided by the Census Bureau. The information presented in this analysis is intended to be a representation of market trends, not an exact count. Though there are some limitations to the data, it provides a good sense of what types of industries have been gaining or

losing employment and establishments in the recent past.

PRINCE GEORGE'S COUNTY EMPLOYMENT TRENDS

Similar to national employment trends, Prince George's County has a concentration of service-related employment. Retail trade (39,742 workers) was the top employment sector in 2005 followed by the professional, scientific, and technical services (30,713 workers), health care and social assistance (25,425 workers), and administrative and support and waste management and remediation services (22,526 workers) (Table 1-6). However, production-based employment is also prevalent in the county. It should be noted the construction sector was the second largest employment sector in 2005 (35,257 workers).

Job growth has been strong in Prince George's County. The county experienced a net increase of 19,505 new jobs, or 8.0 percent, between 1998 and 2005. Much of this growth was concentrated in a few industry sectors. Special trade contractors had the greatest net gain, at more than 7,100 jobs (Table 1-7) accounting for almost all construction growth. Service-related industry sectors such as professional, scientific, and technical services (6,012 new jobs) and food services and drinking places (2,854 new jobs) also experienced large employment gains.

Although some service-related industries experienced a large amount of growth, certain service-sectors experienced a decline in employment. Management of companies and enterprises (3,757 job losses) experienced the largest decline. This is surprising, as other professional industry sectors such as professional, scientific, and technical

services and administrative and support have increased in employment. The consultant is currently researching what caused the decline in management of companies and enterprises; however, no reason has presented itself as of report writing.

Couriers and messengers (1,104 job losses) and general merchandise stores (1,002 job losses) also experienced a significant decline of employment. The decline of general merchandise stores can likely be attributed to the continued growth and development of big-box retailers in the region. The decline in general merchandise employment may also be an indication that recruitment efforts in Upper

Marlboro should focus on the types of services that gained employment, such as food services and drinking places, rather than general merchandise stores. It is important to note that the removal of auxiliary jobs from the county is a result of reclassification rather than job loss. These 1,064 positions were reorganized into the remaining industry sectors.

Some manufacturing sectors increased in employment while others declined. Wood product manufacturing (121 new jobs) and machinery manufacturing (299 new jobs) experienced a fast rate of growth from 1998 to 2005. However, primary metal manufacturing (100 job losses) and computer and electronic product manufacturing (829 job losses) experienced a fast rate of decline in employment

TABLE 1-8:
Establishment Trends, by Major Industry Classifications
Prince George's County; 1998-2005

NAICS	Description	1998	2005	Change	% Change
-----	Total	13,956	14,781	825	5.9%
44	Retail Trade	2,415	2,264	(151)	-6.3%
54	Professional, Scientific, and Technical Services	1,476	1,701	225	15.2%
81	Other Services (except Public Administration)	1,640	1,701	61	3.7%
62	Health Care and Social Assistance	1,555	1,698	143	9.2%
23	Construction	1,538	1,661	123	8.0%
72	Accommodation and Food Services	988	1,125	137	13.8%
56	Administrative and Support and Waste Management and Remediation Services	831	896	65	7.8%
52	Finance and Insurance	717	818	101	14.1%
53	Real Estate and Rental and Leasing	597	704	107	17.9%
42	Wholesale Trade	740	692	(48)	-6.5%
48	Transportation and Warehousing	285	369	84	29.5%
31	Manufacturing	379	360	(19)	-5.0%
51	Information	220	293	73	33.2%
61	Educational Services	135	186	51	37.8%
71	Arts, Entertainment, and Recreation	160	185	25	15.6%
55	Management of Companies and Enterprises	80	80	0	0.0%
99	Unclassified	153	27	(126)	-82.4%
22	Utilities	6	8	2	33.3%
21	Mining	12	7	(5)	-41.7%
11	Forestry, Fishing, Hunting, and Agriculture Support	4	6	2	50.0%
95	Auxiliaries (exc corporate, subsidiary & regional mgt)	25	0	(25)	-100.0%

Source: US Census Bureau and RKG Associates, Inc, 2007

during this time period. Regardless, Upper Marlboro should focus recruitment efforts on service- and retail-related industries rather than manufacturing in order to best fit in with the fabric of the town.

PRINCE GEORGE'S COUNTY ESTABLISHMENT TRENDS

Prince George's County experienced a slower percent growth in establishments (5.9 percent) (Table 1-8) than employment (27.4 percent). This indicates that existing businesses within the county have been more successful at employment retention and expansion while new companies continue to begin operations. The top five sectors, in terms of number of businesses, were very similar to the top employment sectors. Retail trade had the largest amount of businesses (2,264 businesses), followed by professional, scientific, and technical services (1,701 businesses), other services (except public administration) (1,701 businesses), and health care and social assistance (1,698 businesses).

Changes in establishments among the major sectors have varied within the county. Professional, scientific and technical services (225 new businesses) experienced the largest net gain (Table 1-9). However, repair and maintenance and wholesale trade of durable goods experienced the largest net decline (55 and 51 businesses, respectively). In the retail market category, one industry sector experienced a large net gain (food services and drinking places) while two industry sectors experienced a loss (clothing and clothing accessory stores and building material and garden equipment and supply dealers). Similar to employment trends, the decline of clothing and clothing accessory and building material and garden equipment

TABLE 1-9:
Largest Establishment Shifts
Prince George's County; 1998-2005

NAICS	Description	1998	2005	Change	% Change
LARGEST NET GAIN					
541	Professional, Scientific, and Technical Services	1,476	1,701	225	15.2%
722	Food Services and Drinking Places	912	1,065	143	15.7%
531	Real Estate	442	552	110	24.9%
233	Building, developing & general contracting	394	487	93	23.6%
813	Religious, Grantmaking, Civic, Professional, and Similar Organizations	577	665	88	15.3%
LARGEST NET LOSS					
811	Repair and Maintenance	611	556	(55)	-9.0%
421	Wholesale trade, durable goods	536	485	(51)	-9.5%
449	Clothing and Clothing Accessories Stores	415	365	(50)	-12.0%
444	Building Material and Garden Equipment and Supplies Dealers	154	107	(47)	-30.5%
441	Motor Vehicle and Parts Dealers	252	213	(39)	-15.5%
LARGEST PERCENTAGE GAIN					
483	Warehousing and Storage	8	28	20	250.0%
523	Securities, Commodity Contracts, and Other Financial Investments and Related Activities	37	61	24	64.9%
513	Broadcasting & telecommunications	99	157	58	58.6%
484	Truck Transportation	136	190	54	39.7%
811	Educational Services	135	168	33	24.4%
LARGEST PERCENTAGE LOSS					
444	Building Material and Garden Equipment and Supplies Dealers	154	107	(47)	-30.5%
327	Nonmetallic Mineral Product Manufacturing	29	17	(12)	-41.4%
337	Furniture and Related Product Manufacturing	25	19	(6)	-24.0%
451	Sporting Goods, Hobby, Book, and Music Stores	146	116	(30)	-20.5%
332	Fabricated Metal Product Manufacturing	58	47	(11)	-19.0%

1- Minimum of 20 Companies

Source: US Census Bureau and RKG Associates, Inc, 2008

TABLE 1-10:
Employment Trends by Major Industry Classification
Anne Arundel and Calvert Counties; 1998-2005

NAICS	Description	1998	2005	Change	% Change
----	Total	179,243	228,381	49,138	27.4%
44	Retail Trade	30,374	35,737	5,363	17.7%
72	Accommodation and Food Services	18,240	24,093	4,853	25.2%
62	Health Care and Social Assistance	18,717	22,672	3,955	21.1%
54	Professional, Scientific, and Technical Services	13,331	21,450	8,119	60.9%
23	Construction	13,534	20,368	6,834	50.5%
56	Administrative and Support and Waste Management and Remediation Services	12,337	17,500	5,163	41.8%
31	Manufacturing	14,719	15,738	1,019	6.9%
81	Other Services (except Public Administration)	8,429	13,685	4,256	45.1%
48	Transportation and Warehousing	9,568	11,025	1,457	15.2%
42	Wholesale Trade	8,370	10,702	2,332	27.9%
55	Management of Companies and Enterprises	3,635	8,985	5,350	147.2%
52	Finance and Insurance	6,800	8,139	1,278	18.6%
51	Information	4,130	5,248	1,118	27.1%
53	Real Estate and Rental and Leasing	4,344	4,814	470	10.8%
71	Arts, Entertainment, and Recreation	2,995	3,968	973	32.5%
61	Educational Services	2,289	2,977	688	30.1%
22	Utilities	2,413	1,163	(1,250)	-51.8%
21	Mining	87	52	(35)	-40.2%
11	Forestry, Fishing, Hunting, and Agriculture Support	580	52	(528)	-90.7%
99	Unclassified	200	13	(187)	-93.5%
95	Auxiliaries (except corporate, subsidiary & regional mgt)	1,111	0	(1,111)	-100.0%

Source: US Census Bureau and RKG Associates, Inc, 2007

TABLE 1-11:

Largest Employment Shifts
Anne Arundel and Calvert Counties; 1998-2005

NAICS	Description	1998	2005	Change	% Change
LARGEST NET GAIN					
541	Professional, Scientific, and Technical Services	13,331	21,450	8,119	60.9%
551	Management of Companies and Enterprises	3,635	8,885	5,350	147.2%
561	Administrative and Support Services	11,681	18,614	4,933	42.2%
235	Special Trade Contractors	8,923	13,672	4,649	52.1%
722	Food Services and Drinking Places	17,221	21,505	4,284	24.9%
LARGEST NET LOSS					
221	Utilities	2,413	1,163	(1,250)	-51.8%
323	Printing and Related Support Activities	2,105	1,259	(846)	-40.2%
115	Support Activities for Agriculture and Forestry	555	38	(517)	-93.2%
624	Social Assistance	4,355	3,841	(414)	-9.5%
488	Support Activities for Transportation	1,797	1,418	(379)	-19.3%
LARGEST PERCENTAGE GAIN					
483	Warehousing and Storage	45	825	780	1733.3%
311	Food Manufacturing	90	420	330	366.7%
322	Paper Manufacturing	175	620	445	254.3%
324	Petroleum and Coal Products Manufacturing	50	175	125	250.0%
514	Information & data processing services	375	1,181	788	209.6%
LARGEST PERCENTAGE LOSS					
115	Support Activities for Agriculture and Forestry	555	38	(517)	-93.2%
533	Lessors of Nonfinancial Intangible Assets (except Copyrighted Works)	261	80	(181)	-69.7%
221	Utilities	2,413	1,163	(1,250)	-51.8%
711	Performing Arts, Spectator Sports, and Related Industries	653	340	(313)	-47.9%
321	Wood Product Manufacturing	117	63	(54)	-46.2%

1- Minimum of 100 Employees

Source: US Census Bureau and RKG Associates, Inc, 2008

TABLE 1-12:

Establishment Trends, by Major Industry Classification
Anne Arundel and Calvert Counties; 1998-2005

NAICS	Description	1998	2005	Change	% Change
----	Total	13,334	15,554	2,220	16.8%
23	Construction	1,955	2,291	336	17.2%
44	Retail Trade	2,082	2,272	192	9.2%
54	Professional, Scientific, and Technical Services	1,588	2,207	619	39.0%
81	Other Services (except Public Administration)	1,317	1,481	164	12.5%
62	Health Care and Social Assistance	1,113	1,313	395	21.1%
72	Accommodation and Food Services	907	1,070	169	18.0%
56	Administrative and Support and Waste Management and Remediation Services	845	902	57	6.7%
52	Finance and Insurance	681	844	163	23.9%
42	Wholesale Trade	683	705	12	1.7%
53	Real Estate and Rental and Leasing	482	581	209	43.4%
48	Transportation and Warehousing	453	507	54	11.9%
31	Manufacturing	384	384	0	0.0%
71	Arts, Entertainment, and Recreation	251	304	53	21.1%
51	Information	203	274	71	35.0%
61	Educational Services	123	161	38	30.9%
55	Management of Companies and Enterprises	61	80	19	31.1%
99	Unclassified	45	30	(15)	-33.3%
11	Forestry, Fishing, Hunting, and Agriculture Support	12	13	1	8.3%
22	Utilities	15	11	(4)	-26.7%
21	Mining	9	0	(9)	-100.0%
95	Auxiliaries (except corporate, subsidiary & regional mgt)	16	0	(16)	-100.0%

Source: US Census Bureau and RKG Associates, Inc, 2007

TABLE 1-13:

Largest Establishment Shifts
Anne Arundel and Calvert Counties; 1998-2005

NAICS	Description	1998	2005	Change	% Change
LARGEST NET GAIN					
541	Professional, Scientific, and Technical Services	1,588	2,207	619	39.0%
531	Real Estate	363	573	210	57.8%
235	Special trade contractors	1,900	1,398	198	16.5%
722	Food Services and Drinking Places	844	994	150	17.8%
621	Ambulatory Health Care Services	828	948	120	14.5%
LARGEST NET LOSS					
485	Transit and Ground Passenger Transportation	112	89	(23)	-20.5%
421	Wholesale trade, durable goods	501	482	(19)	-3.8%
323	Printing and Related Support Activities	84	68	(16)	-19.0%
444	Building Material and Garden Equipment and Supplies Dealers	143	128	(15)	-10.5%
492	Couriers and Messengers	41	32	(9)	-22.0%
LARGEST PERCENTAGE GAIN					
483	Warehousing and Storage	2	20	18	900.0%
487	Scenic and Sightseeing Transportation	6	20	14	233.3%
514	Paper Manufacturing	30	50	20	66.7%
513	Electrical Equipment, Appliance, and Component Manufacturing	81	134	53	65.4%
623	Water Transportation	75	122	47	62.7%
LARGEST PERCENTAGE LOSS					
492	Couriers and Messengers	41	32	(9)	-22.0%
485	Transit and Ground Passenger Transportation	112	89	(23)	-20.5%
323	Printing and Related Support Activities	84	68	(16)	-19.0%
444	Building Material and Garden Equipment and Supplies Dealers	143	128	(15)	-10.5%
511	Publishing Industries (except internet)	58	53	(5)	-8.6%

1- Minimum of 20 Companies

Source: US Census Bureau and RKG Associates, Inc, 2008

supply businesses may be attributable to growth in big-box retail establishments.

ANNE ARUNDEL AND CALVERT COUNTIES EMPLOYMENT TRENDS

An analysis of the County Business Patterns for Anne Arundel and Calvert Counties were included in this report to provide a regional comparison of employment and establishment trends. The data indicates that job growth has been stronger in Anne Arundel and Calvert Counties (27.4 percent increase) than in Prince George's County (8.0 percent increase) (Table 1-10).

However, job growth has concentrated in many of the same categories as Prince George's County. Retail trade (35,737 jobs) had the largest employment count in 2005. Service-related

employment sectors accounted for five of the six largest employment concentrations, including accommodation and food services (24,093 jobs), health care and social assistance (22,672 jobs) and professional, scientific, and technical services (21,450 jobs). Similar to Prince George's County, the construction employment sector accounts for a significant share of jobs (20,368 jobs).

Employment gains and losses at the employment sector level have also varied by industry sector within the study region (Table 1-11). In terms of employment gain, service-related jobs such as professional, scientific and technical services (8,119 new jobs) have added a large amount of employment, followed by management companies and enterprises (5,350 new jobs) and administrative and support services (4,933 new jobs). Also similar to Prince George's County, special trade contractors (4,649 new jobs) added a large number of jobs to the study area. However, it should be noted that Anne Arundel and Calvert Counties experienced a large net increase in management companies and enterprises while Prince George's County experienced a large net loss in this same category.

ANNE ARUNDEL AND CALVERT COUNTIES

ESTABLISHMENT TRENDS

Similar to Prince George's County, establishment growth in Anne Arundel County and Calvert Counties (16.6 percent) (Table 1-12) has been slower than employment growth (27.4 percent). The two counties experienced a net gain of 2,220 establishments from 1998 to 2005. Construction (2,291 businesses) had the most establishments in 2005. Retail trade, (2,274 businesses) professional, scientific, and technical services

(2,207 businesses), and other services (except public administration) (1,481 businesses) also had high establishment counts in the counties.

Similar to employment growth trends, professional, scientific and professional services experienced a large net growth in establishments (Table 1-13). This industry sector also experienced a large net growth in Prince George's County. Other large net growth in establishments in Anne Arundel and Calvert Counties occurred in real estate (210 new businesses) and special trade contractors (198 new businesses).

Net decline in establishment sectors somewhat differed from net decline employment sectors. While printing and related support activities experienced a large net decline in both employment and establishments (16 business losses), transit and ground passenger transportation (23 business losses) and wholesale trade of durable goods (19 business losses) also experienced a large net decline in establishments. Wholesale trade of durable goods and building material and garden equipment and supplies dealers also experienced a significant decline in establishments in Prince George's County.

OCCUPATIONAL CHARACTERISTICS

Occupational information is measured by the function of a job, regardless of its industry. This differs from the employment analysis earlier, which was a breakdown of employment by industry. For example, a receptionist position for a manufacturing firm would be classified as manufacturing in the industry-based data, while that same position at a law firm would be considered a professional service job. However, these two positions are considered the same under the occupational data presented below.

Occupational data is compiled by the Maryland Department of Labor, Licensing, and Regulation (MDLLR) and contains employment levels for several hundred occupational categories in the county for 2004. In order to simplify the analysis, the consultants grouped these occupational categories into six broad skill categories. The occupational grouping was subjective, based upon the consultant's common knowledge of typical occupational skill and educational requirements. The regrouped categories and their descriptions are as follows:

- **Highly-Skilled White Collar (HSWC):** a professional position requiring a college degree, with supervisory/management responsibility or specialized training while working within a white collar work environment.
- **Highly-Skilled Blue Collar (HSBC):** a trade or nonprofessional position requiring less than an advanced degree, but some post secondary education, a certificate, or specialized training or skill while working within a white collar work environment.

- **Semiskilled White Collar (SSWC):** a professional position requiring less than an advanced degree, but some post secondary education, a certificate, or specialized training or skill while working within a white collar work environment.
- **Semiskilled Blue Collar (SSBC):** a trade position requiring less than an advanced or trade school degree but requiring some specialized training or skill, while working within a blue collar environment.
- **Low-Skilled White Collar (LSWC)** a position within a white collar work environment requiring no degree or formal schooling beyond high school, but requiring some on-the-job training.

- **Low-Skilled Blue Collar (LSBC):** a position within a trade profession requiring no advanced degree or formal schooling, but requiring some on-the-job training.

Although it is difficult to group occupational categories in this manner with great precision, the results provide some indication of the distribution and diversity of skills available within the labor force. According to the MDLLR, Prince George's County had an occupational employment level of 339,060 workers in 2004 (Figure 1-5).

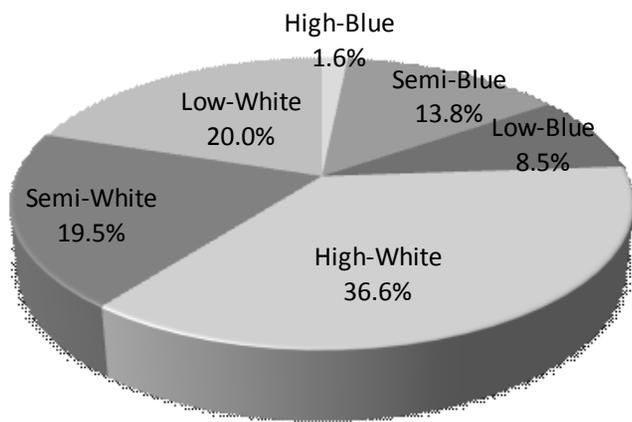
The county's occupational employment base is fairly evenly spread amongst the different skill groups. The largest occupational skill group is high-skilled white collar positions (123,995 workers) (Table 1-14), which comprised 36.6 percent of the occupational workforce in 2004. Major occupations within this skill group include computer specialists (15,210 workers), business operations specialists (11,930 workers) and primary, secondary, and special education teachers (11,005 workers). Low-skilled, white collar positions comprise the second largest occupational skill group (67,755 workers), totaling 20.0 percent of the workforce. The largest concentration of workers in this skill level is retail sales workers (21,950 workers). Food and beverage serving workers (11,300) and material recording, scheduling, dispatching, and distributing workers (10,585 workers) also are the top occupations in this skill level. Lastly, semiskilled white collar positions comprise 19.5 percent of the total occupational workforce. The largest occupational categories in this skill level are information and record clerks (13,415 workers) and other office and administrative support workers (9,925 workers).

Blue collar positions account for a smaller percentage of the total occupational workforce (23.9 percent). Of blue-collar jobs, the largest occupational group is semiskilled blue collar workers (13.8 percent). Construction trade (23,125 workers) and other installation, maintenance, and repair occupations (7,805 workers) are the largest occupations in this skill category. Low-skilled blue collar positions comprise less of the occupational workforce (8.5 percent) than semi-skilled blue collar workers. Motor vehicle operators (12,170 workers) and material moving occupations (11,825 workers) are the largest occupations in this skill level. Lastly, only 1.6 percent of the occupational workforce is employed in high-skilled blue collar positions. These positions typically pay more than semiskilled or low-skilled white collar and blue collar positions. Supervisors of construction and extraction workers (2,930 workers) and supervisors of installation, maintenance and repair workers (1,180 workers) are the largest occupational categories in this skill level.

It is projected that high-skilled white collar workers and low-skilled white collar workers will account for most of the County's job growth. According to the MDLLR, the number of white-collar workers will increase by 23,930, or 19.3 percent, through 2014 (Table 1-14). Low-skilled white collar workers are projected to increase by 9,045 workers, or 13.3 percent through 2014. The comparatively large share of white-collar workers presents an incentive for retail and professional service-related industries to locate to the county as they will have access to a large employment pool.

In contrast, growth in blue-collar occupations are projected to be less robust on a net growth

FIGURE 1-5:
Labor Force Skill Level Prince George's County;
2004



Source: Maryland Department of Labor and RKG Associates, Inc, 2007

TABLE 1-14:Occupational Skill Demand Forecasts
Prince George's County; 2004-2014

Skill Level	2004	2014	Change	% Change
High-Skilled White Collar	123,895	147,826	23,930	19.3%
Semi-Skilled White Collar	68,255	73,240	6,985	10.5%
Low-Skilled White Collar	67,750	70,800	3,045	13.3%
TOTAL	259,900	291,866	31,966	15.5%
High-Skilled Blue Collar	5,410	6,330	920	17.0%
Semi-Skilled Blue Collar	46,690	54,220	7,530	16.1%
Low-Skilled Blue Collar	28,055	32,405	4,350	11.9%
TOTAL	81,055	92,955	11,900	14.7%

Source: Maryland Department of Labor, Licensing and Regulation and RKG Associates, Inc, 2008

TABLE 1-15:Top Ten Fastest Growing Occupations
Prince George's County; 2004-2014

Occupation	Skill Level	2004	2014	Change	% Change
Postsecondary Teachers	IW	6,930	9,165	2,235	32.3%
Nursing, Psychiatric, and Home Health Aides	HW	2,745	3,620	875	31.9%
Counselors, Social Workers, and Other Community and Social Service Specialists	IW	2,590	3,360	770	29.7%
Other Personal Care and Service Workers	LW	2,305	2,985	680	29.5%
Occupational and Physical Therapist Assistants and Aides	SW	105	135	30	28.6%
Grounds Maintenance Workers	LW	4,155	5,310	1,155	27.8%
Computer Specialists	HW	15,210	19,415	4,205	27.6%
Other Protective Service Workers	SW	5,315	6,725	1,410	26.5%
Other Education, Training, and Library Occupations	HW	4,030	5,010	980	24.3%
Building Cleaning and Pest Control Workers	LW	7,080	8,780	1,690	23.8%

Source: Maryland Department of Labor and RKG Associates, Inc, 2007

level. However, it should be noted that the rate of increase for blue-collar workers, especially high-skilled blue collar workers, is strong. Growth rates range from 11.9 percent (low-skilled blue collar) to 17.0 percent (high-skilled blue collar). Of the blue-skilled positions, semi-skilled blue collar workers are projected to add the largest amount of jobs (7,530 new workers). High-skilled blue collar occupations are projected to add 920 jobs.

The individual occupations projected to grow the fastest are all classified as white collar. High-skilled white collar occupations, account for five of these fast growing occupations (Table 1-15) and include postsecondary teachers, nursing and home health aides, counselors and social workers, computer specialists, and other education, training, and licensing occupations. Other personal care and service workers (low-white), occupational and physical therapists

assistants and aides (semi-white), grounds maintenance workers (low-white), other protective service workers (semi-white), and building, cleaning and pest control workers (low-white) account for the remaining five spots. This finding is consistent with national trends, as employment transitions from production to service-related industries.

MEDIAN WAGES

The consultant team also collected the median hourly and annual wage data for Prince George's County from the Maryland Department of Labor, Licensing and Regulation (MDLLR). The MDLLR collected wage data from the Occupational Employment Statistics program, which conducts a semiannual mail survey designed to produce estimates of employment and wages for specific occupations. The following wage data represents the most current estimates available and provide an overall sense of wages in Prince George's County.

TABLE 1-16:

Median Wages
Prince George's County; 2007

Occupation	Hourly Median Wage	Annual Median Wage
Management Occupations	\$45.50	\$94,525
Business and Financial Operations Occupations	\$29.00	\$60,500
Computer and Mathematical Occupations	\$38.75	\$80,350
Architecture and Engineering Occupations	\$38.00	\$78,900
Life, Physical, and Social Science Occupations	\$40.25	\$83,850
Community and Social Services Occupations	\$19.25	\$40,000
Legal Occupations	\$28.25	\$58,875
Education, Training, and Library Occupations	\$21.25	\$44,425
Arts, Design, Entertainment, Sports, and Media Occupations	\$23.25	\$48,225
Healthcare Practitioners and Technical Occupations	\$34.25	\$71,425
Healthcare Support Occupations	\$13.00	\$27,200
Protective Service Occupations	\$17.50	\$36,300
Food Preparation and Serving Related Occupations	\$8.25	\$17,050
Sales and Related Occupations	\$17.75	\$36,825
Office and Administrative Support Occupations	\$16.00	\$33,275
Farming, Fishing, and Forestry Occupations	\$17.25	\$35,775
Construction and Extraction Occupations	\$19.75	\$41,025
Installation, Maintenance, and Repair Occupations	\$21.25	\$44,075
Production Occupations	\$15.25	\$31,550
Transportation and Material Moving Occupations	\$13.00	\$27,025
Total all occupations	\$18.00	\$37,450

Source: Maryland Department of Labor and RKG Associates, Inc, 2007

Prince George's County has a current median annual wage of \$37,450. As mentioned previously, the top employment sectors in Prince George's County include professional service industries. The wages for these types of industries tend to be higher than other industry sectors. The data indicates management occupations have the highest median annual wage (\$94,525). The retail sector also had a large share of employment in Prince George's County (39,742 jobs). However, the median wage for retail sectors is \$24,225 (in the sales and related occupations category) and is one of the lower-paid industries. The lower wage for retail sectors may attract new retailers to the area, as they will be able to save in administrative and labor costs.

However, the lower-paying jobs may mean that the employees will need to come from outside of Upper Marlboro. As mentioned previously, Upper Marlboro has a comparatively high median household income, and those in lower-paying jobs may not be able to afford the cost of living in town.

LABOR FORCE AND UNEMPLOYMENT TRENDS

LOCAL LABOR FORCE PARTICIPATION

Prince George's County has the largest labor force of the three study areas. Labor force data was collected from the Bureau of Labor Statistics and represents those over the age of 16 that are active participants in the labor force. According to the Bureau of Labor Statistics, Prince George's County had 454,601 active labor force participants in 2006. This total reflects a net increase of nearly 9,477 workers over 2005 levels for a growth rate of 2.1 percent (Table 1-17). This is not surprising as Prince George's County is close to the major employment center of Washington, DC. Anne Arundel accounts for the second largest labor supply in the study area and had 283,120 active labor force participants in 2006. Calvert County has a comparatively small labor force (47,366). All three counties have increased in total labor force participants during the study period.

LABOR FORCE PARTICIPATION RATE

Labor force participation rates are another important indicator of labor force quality, as they represent the percentage of people in the population over the age of 16 that are either: (1) currently employed or (2) are unemployed but actively seek employment. People who

TABLE 1-17:
Local Labor Force, 197-2006

	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
TOTAL LABOR FORCE										
Prince George's County	447,882	443,922	444,330	430,406	430,708	436,622	440,873	440,424	445,124	454,801
Calvert County	56,376	57,488	58,252	40,479	40,997	42,615	44,356	45,205	46,908	47,336
Anne Arundel County	255,213	255,862	258,784	268,266	269,868	271,837	270,721	271,335	276,179	283,120
NET CHANGE										
Prince George's County	-	(3,960)	408	(13,924)	300	5,916	4,051	(249)	4,700	9,477
Calvert County	-	1,112	764	2,227	518	1,618	1,741	849	1,098	1,033
Anne Arundel County	-	649	2,922	9,484	1,600	2,029	(1,176)	614	4,844	6,941

Source: Bureau of Labor Statistics and RKG Associates, Inc, 2008

have given up their job search are said to have “dropped out” of the labor force and are not counted as participants. The labor force participation data, or the percent of those over 16 that are in the labor force, was obtained from DemographicsNow. Though DemographicsNow does not report yearly participation rates, a sense of the general trends can be obtained by comparing 2000 and 2007 data.

Prince George's County and Calvert County experienced a minor increase in labor force participation while the labor force participation rate for Anne Arundel slightly decreased (Table 1-18) during the study period. There are a few possible reasons for a growth of labor force participation. One reason for labor force participation growth is an influx of households and population over 16, and in fact, Prince

TABLE 1-18:
Labor Force Participation Rate, 2000-2007

	2000	2007	Net Change
Prince George's County	70.81%	72.15%	1.51%
Calvert County	71.54%	73.94%	2.40%
Anne Arundel	71.10%	70.13%	-0.97%

Source: DemographicsNow and RKG Associates, Inc, 2007

George's County experienced an increase in population (59,563) from 2000 to 2006. Another reason for growth is easy access to jobs. More portions of the marginal population, which seek work only if there is easy access to jobs, may be locating to the county. Examples of this marginal population includes those that need to work atypical hours, such as mothers, or those that need close transportation access to and from work, such as handicapped persons. Lastly, a rising cost of living forces more people into employment that might not work otherwise, such as stay-at-home mothers.

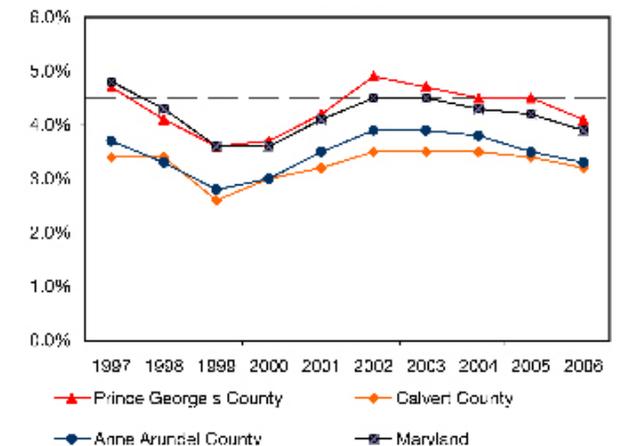
Conversely, reasons for a decline in labor force participation include an aging population of people nearing retirement age and dropping out of the labor force. In addition, a decline may indicate a more affordable cost of living that allows more people to not work. Lastly, it could be an indicator that job growth in 2007 was not as robust as it was in 2000. However, county business pattern data indicated that there was strong job growth from 1998 to 2005 as 4,196 jobs were added to Calvert County and 44,942 jobs were added to Anne Arundel County. As such, the slow growth and decline in labor force participation in the study area is more

likely a result of the aging population or more affordable cost of living rather than a decline of employment.

UNEMPLOYMENT RATE TRENDS

Unemployment rates have decreased in all study areas. Unemployment steadily declined during the late 1990s, hitting the 10-year low for all jurisdictions in 1999 (Figure 1-6). In 2001, the economy experienced a national downturn following the tragedies on September 11. As a result, unemployment increased in all jurisdictions until 2003, when the economy started to stabilize. Of the three counties within the study area, Calvert County had the lowest unemployment rates in 2006 (3.2 percent).

FIGURE 1-6:
Unemployment Rate Trends
Comparative Analysis; 1997-2006



Source: Bureau of Labor Statistics and RKG Associates, Inc, 2007

Unemployment rates for Prince George's County ranged from 3.6 percent to 4.9 percent during this period, with a most recent unemployment rate of 4.1 percent. Prince George's County is generally on par with the state-wide unemployment rate trends. However, it has a higher unemployment rate than both Anne Arundel and Calvert Counties. This indicates there may be more labor available for new or expanding employers in Prince George's County than in Anne Arundel or Calvert Counties.

COMMUTING PATTERNS

Commuting pattern data was collected from the U.S. Census Bureau for the year 2000. Although commuter data is only reported once every ten years, the following analysis provides a general sense of where people are commuting to work and utilizes the most current available data. Prince George's County is a net exporter of labor. There were 241,732 (60.8 percent) of employed residents that left the county for work in 2000 (Table 1-19). Approximately 139,615 commuters entered into Prince George's County for work, which results in a net export of 102,117 workers.

The majority of county residents (31.7 percent) who left for their job are employed in Washington, D.C. (Table 1-20). However, 14.7 percent of employed residents work in Montgomery County, Maryland (10.1 percent), and Fairfax County, Virginia (4.6 percent). Other areas in Maryland, such as Anne Arundel County, Baltimore City, and Howard County, and places in Virginia such as Arlington County, Alexandria City, and Loudon County also account for a smaller but significant share of workers.

TABLE 1-19:

Commuting Patterns for Prince George's County 2000

	Residents Working in the County	Residents Working Outside the City	Percentage of Workers Leaving the County	Commuters Entering the County	Net Import (Export) of Workers
Prince George's County	155,671	241,732	60.8%	139,615	(102,117)

Source: US Census County to County Worker Flow and RKG Associates, Inc, 2007

TABLE 1-20:

Commuting Patterns - Employed Residents of Prince George's County; 2000

County Where Employed	Number	Percent
Prince George's County, MD	155,671	39.2%
Washington, DC	126,130	31.7%
Montgomery County, MD	40,240	10.1%
Fairfax County, VA	18,258	4.6%
Arlington County, VA	15,012	4.0%
Anne Arundel County, MD	9,008	2.3%
Alexandria City, VA	7,372	1.9%
Howard County, MD	7,071	1.8%
Baltimore City, MD	3,662	0.9%
Charles County, MD	3,646	0.9%
Baltimore County, MD	1,800	0.5%
Loudon County, VA	1,006	0.3%
Calvert County	611	0.2%
Other In-State	1,455	0.4%
Other Out of State	5,280	1.3%
Out of Country	243	0.1%
Total	397,408	100.0%

Source: US Census Bureau - 2000 County to County Worker Flow Files and RKG Associates, Inc, 2007

TABLE 1-21:

Commuting Patterns - Persons working in Prince George's County; 2000

County of Residence	Number	Percent
Prince George's County, MD	155,671	52.7%
Montgomery County, MD	26,825	9.1%
Anne Arundel County, MD	26,271	8.9%
Howard County, MD	14,538	4.9%
Charles County, MD	13,834	4.7%
Washington, DC	13,655	4.6%
Fairfax County, VA	9,594	3.2%
Calvert County	8,243	2.8%
Baltimore County, MD	4,714	1.6%
Baltimore City, MD	2,917	1.0%
Arlington County, VA	2,043	0.7%
Alexandria City, VA	1,813	0.6%
Loudon County, VA	585	0.2%
Other In-State	7,554	2.6%
Other Out of State	7,019	2.4%
Out of Country	-	0.0%
Total	295,286	100.0%

Source: US Census Bureau - 2000 County to County Worker Flow Files and RKG Associates, Inc, 2007

In contrast, less than 140,000 workers commute into the County for work. The commuters are primarily from Montgomery County (9.1 percent) and Anne Arundel County (8.9 percent) (Table 1-21). Interestingly, many surrounding counties such as Anne Arundel County and Howard have more workers who commute out of their county to Prince George's County than workers who commute in. Regardless, there is a relatively large amount of labor available in Prince George's County, which should be able to support new retail, service, or office establishments that may locate to Upper Marlboro.

IMPLICATIONS

Upper Marlboro has a small population (654 residents). If the town maintains the same population into the future, the amount of businesses the area can support likely will not increase from what is currently located in the town. Although the amount of land available for new housing is limited, there are opportunities for residential development, particularly at the Smith/Claggett site and at the vacant parcel just west of the Old Marlborough Academy. The construction of new housing units will bring additional population into Upper Marlboro, thereby increasing the amount of retail and service establishments that the town will be able to support.

Prince George's County has a strong employment base. From 1998 to 2005, approximately 19,500 jobs were added to the county. Many of these jobs were in the retail or service-related industries, which are the types of businesses that would locate to Upper Marlboro. In addition, job growth in Prince George's County

is projected to remain strong and grow into the future. Specifically, white-collar occupations are projected to grow 15.5 percent through 2014. The large amount of white-collar workers in Prince George's County indicates there is a large employment base that new service, office, and retail establishments can draw from.

The income and education levels of Upper Marlboro are also comparatively strong. The current median household income is \$69,788. As a comparison, DemographicsNow indicates the median household income for the entire United States is currently \$51,680. The high income levels indicate higher-end retail and service establishments can be supported, which is talked about in more detail in the Retail Market Analysis chapter.

