

Section 2

Existing Conditions Analysis





Source: Joannatkaczuk, iStock.

Produce at a Farmer's Market.

Who lives and works in Bowie-Mitchellville and Vicinity? How is the population changing?

2.1 Demographic and Economic Profile



The Bowie-Mitchellville and Vicinity area is home to nearly 1 in 10 Prince Georgians, about 86,500 people, as of 2018. Who exactly lives in the master plan area? How do their demographics compare to the County and the region as a whole? And what are some of the key characteristics to understand about Bowie's economy and built environment?

This section seeks to better understand the demographic and economic profile of the master plan area, including who lives in Bowie-Mitchellville and Vicinity, how various groups are distributed within the master plan area, and how the population is growing and changing. Next, this section examines development

density in Bowie-Mitchellville and Vicinity, including both people and dwelling units per acre. This section also considers employment in Bowie, including which sectors are experiencing growth and which employ the highest numbers of employees.

COVERED IN THIS SECTION:

- Demographic Profile
- Growing Market
- Household Profile
- Development Density
- Employment Profile

Seniors ages 55 and up are the fastest growing age group in Bowie-Mitchellville and Vicinity, with the greatest gains coming from those aged 65-74.

Demographic Profile

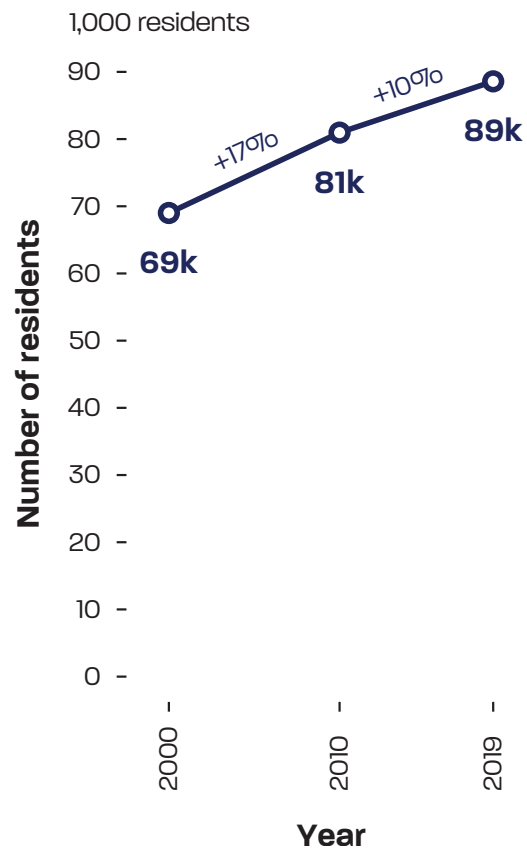
The demographic and economic characteristics of these residents and the homes they live in are different from the County overall. Residents in the master plan area are somewhat older and more likely to own a home than the average resident in Prince George's County. The median household income in the master plan area (\$120,900) is \$39,100 higher than that of the County overall. Residents in Bowie-Mitchellville and Vicinity are also more likely to have a bachelors or post-graduate degree than the overall County population, and educational attainment tends to be higher where new development has occurred, including along the Church Road corridor.

Bowie-Mitchellville and Vicinity is growing at a slightly faster pace than the County as a whole (though slower than the overall Washington, D.C. metropolitan region), and the two age groups growing the fastest are seniors and young professionals. Plan 2035 identifies three fast-growing groups in Prince George's County expected to shape the County's needs between the plan's publishing, in 2014, and 2035: millennials, seniors, and the Hispanic population. While millennials and seniors are both growing in the master plan area, the Hispanic population is comparatively smaller and growing less rapidly when compared to countywide demographic trends.

Seniors ages 55 and up are the fastest growing age group in Bowie-Mitchellville and Vicinity, with the greatest gains coming from those aged 65-74. Consistent with countywide trends, young adults between the ages of 25 and 34 (who fall within the millennial generation) are the only age group under 55 that grew in the last decade.

Over half (57 percent) of the master plan area identifies as Black, while this group makes up about 62 percent of the County as a whole. The master plan area has a larger proportion of White residents, and a smaller proportion of Hispanic/Latino residents, than the County overall. About 27 percent of the master plan area identifies as White, as compared to about 13 percent of the County overall. About seven percent of the master plan area identifies as Hispanic/Latino, as compared to 18 percent of the County overall.

Figure 1. Bowie-Mitchellville and Vicinity Population Growth (2000–2010, 2010–2019)



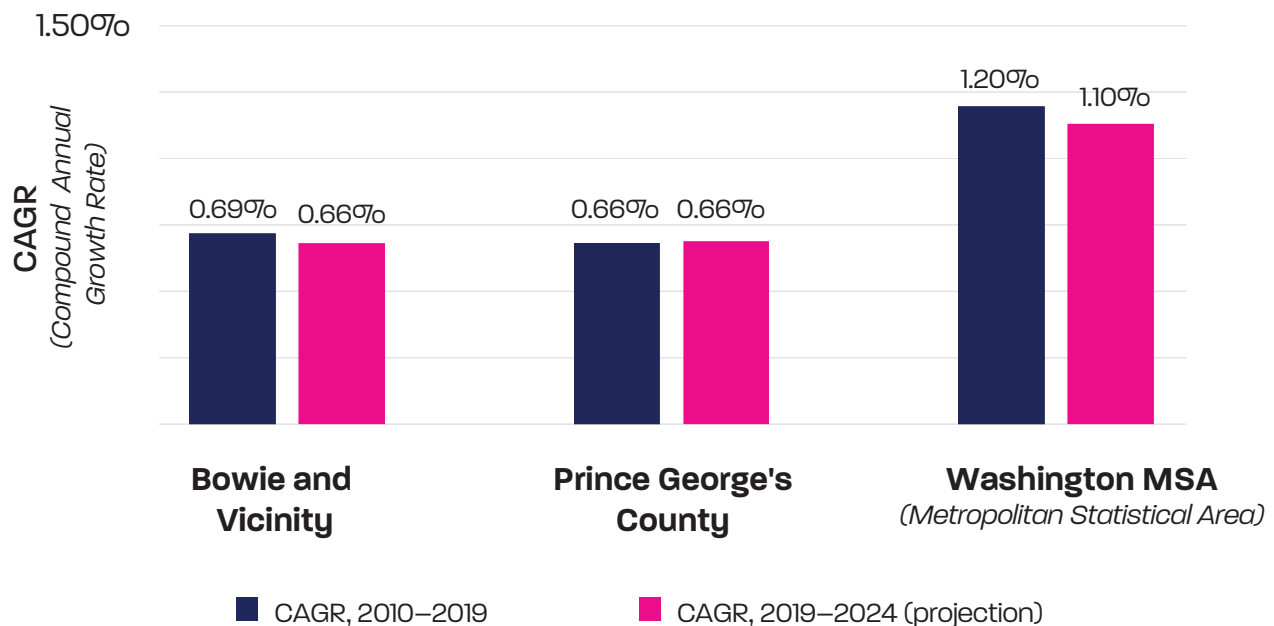
Source: ESRI Business Analyst, 2019.

GROWING MARKET

The master plan area has experienced moderate population growth in recent years, with total population increasing 6.4 percent from 2010 to 2019. This growth rate is substantially smaller than the population growth of over 17 percent between 2000 and 2010.

The Compound Annual Growth Rate (CAGR) is a way to look at the accumulated growth in a population on an annual basis, as opposed to simple growth, which describes total growth within a defined period of time. A population's CAGR, similar to the accrual of interest, demonstrates the growth rate on an annual basis

Figure 2. Compound Annual Growth Rate (CAGR) (2010–2024)



Source: ESRI Business Analyst, 2019.

within a defined period of time. Bowie-Mitchellville and Vicinity's total population grew by 6.4 percent from 2010 to 2019 (Figure 1), which represents a CAGR of 0.69 percent (Figure 2). Looking to the future, Bowie is projected to add residents on an annual basis at the same rate as the County overall, but lags far behind expected annual growth for the Washington region.

Between 2010 and 2019, the master plan experienced slightly more rapid population growth on an annual basis than Prince George's County. However, the Washington Metropolitan Statistical Area (MSA) grew at a more rapid pace over the last decade than both the master plan area and Prince George's County, a trend projected to continue into the future. One important question for this master plan process is how planning can increase Bowie-Mitchellville and Vicinity's capture of future County and regional growth.

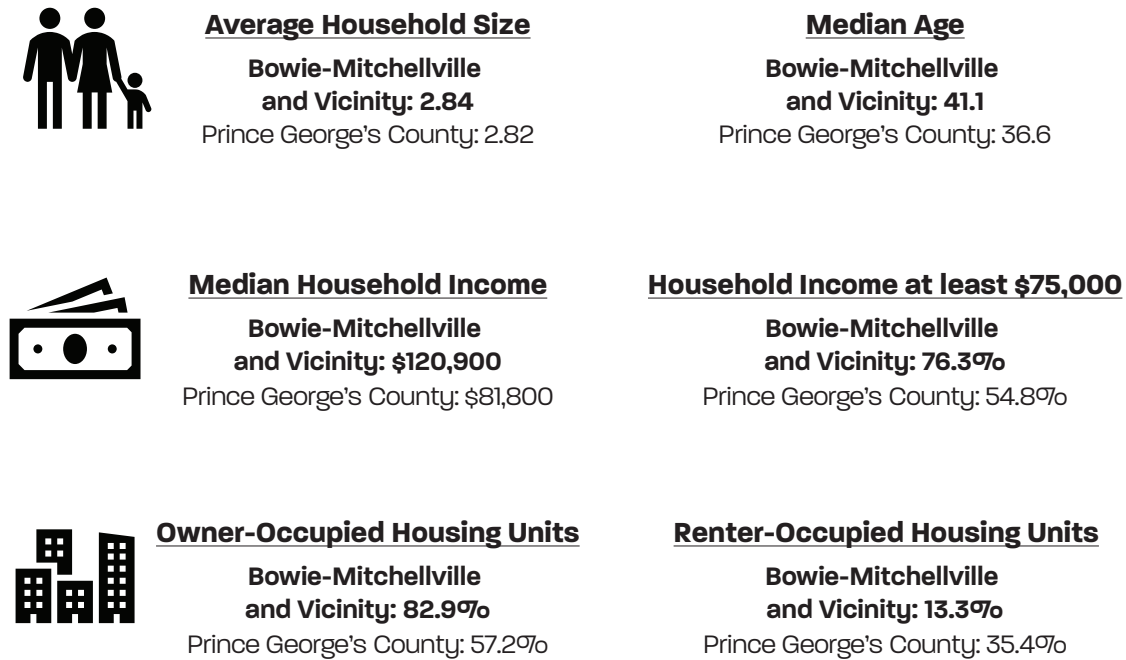
POPULATION SNAPSHOT

Households within Bowie-Mitchellville and Vicinity are slightly older, more likely to own homes, and have higher household incomes than households in Prince George's County overall.

As seen in Figure 3. Population Snapshot and Comparison: Bowie-Mitchellville and Vicinity and Prince George's County on the following page, the most notable differences between residents of Bowie-Mitchellville and Vicinity and their fellow Prince Georgians include household income and home ownership rates. The median annual household income in the master plan area is \$120,900, 48 percent higher than the median in Prince George's County overall, about \$81,800. More than 75 percent of households in Bowie-Mitchellville and Vicinity earn more than \$75,000 per year, compared to about 50 percent in the County overall. Home ownership rates are much higher in the master plan area than in Prince George's County overall, about 83 and 57 percent respectively.

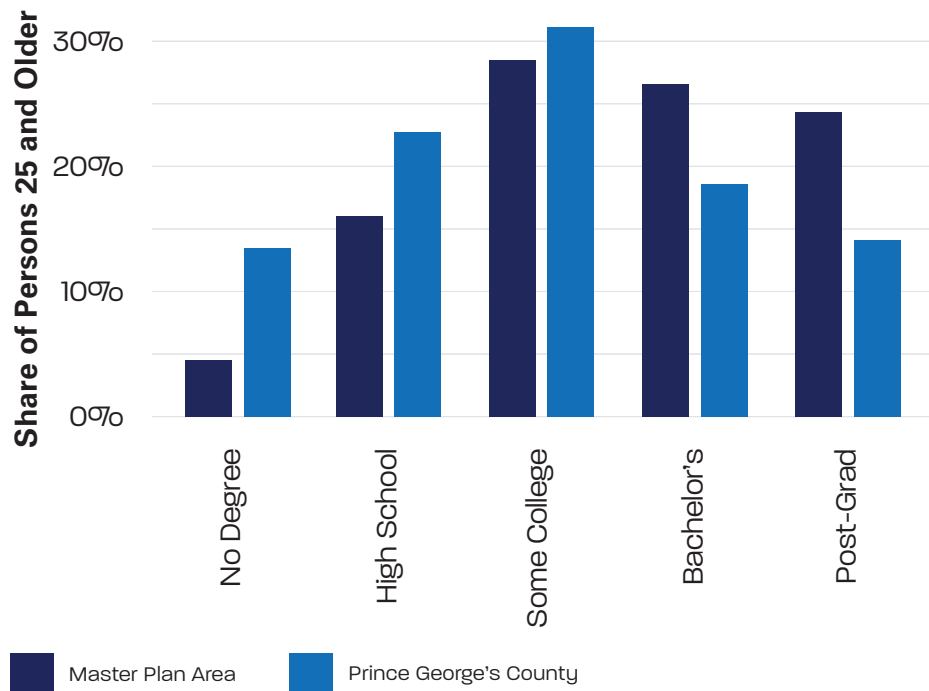
Part of this difference in income and homeownership can be explained by age, as household income and wealth tend to increase with age. The median age in the master plan area is 41.1, 4.5 years older than the County median age of 36.6. The age distribution of residents in the master plan area is examined in more detail later in this section.

Figure 3. Population Snapshot and Comparison: Bowie-Mitchellville and Vicinity and Prince George's County

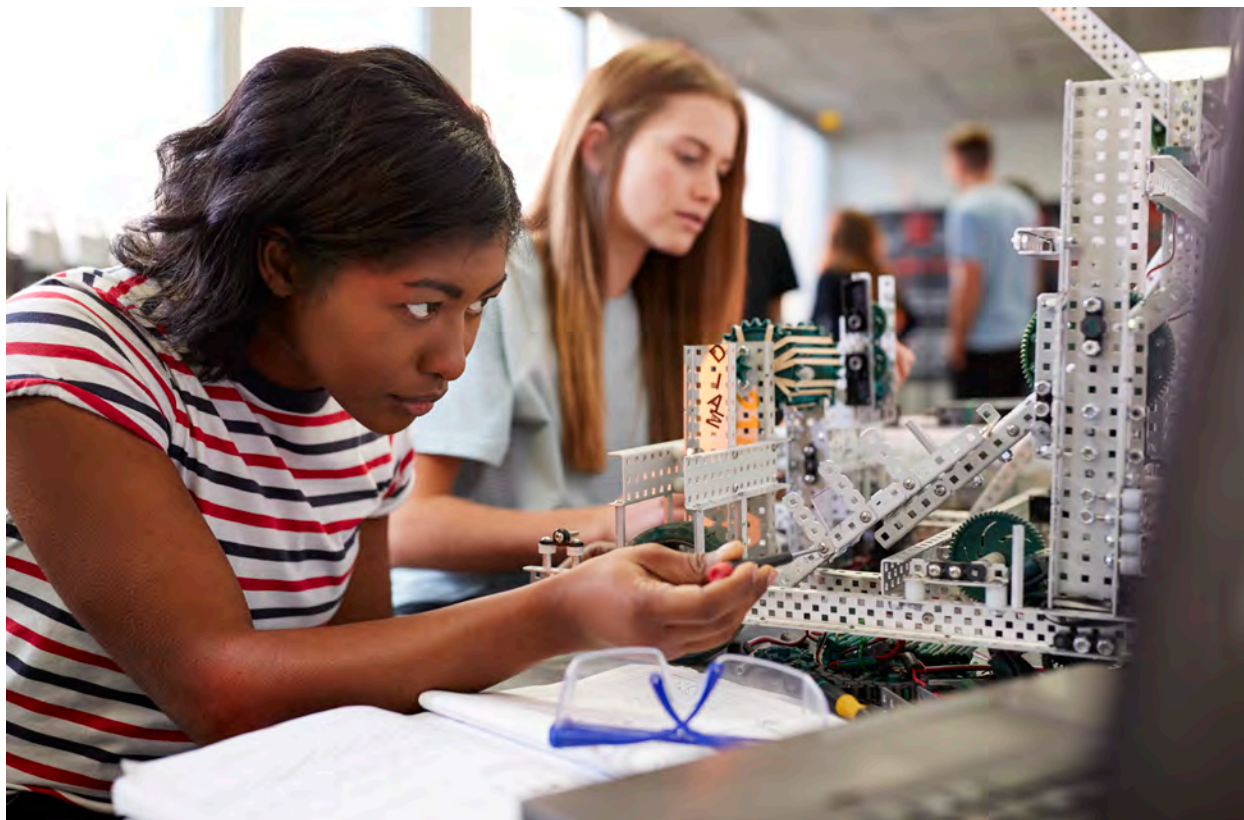


Source: U.S. Census Bureau, 2018 5-year American Community Survey.

Figure 4. Population 25+ by Educational Attainment in Bowie-Mitchellville and Vicinity and Prince George's County (2018)



Source: U.S. Census Bureau, 2018 5-year American Community Survey.



Source: Monkeybusinessimages, iStock.

EDUCATIONAL ATTAINMENT

The master plan area is comprised of a much more highly educated population than Prince George's County overall, a reality reflected in the master plan area's median household income being more than \$39,000 greater than the County median. More than half of Bowie-Mitchellville and Vicinity residents (51 percent) aged 25 and older have a bachelor's or advanced degree such as a masters or doctorate. In comparison, one in three Prince Georgians (33 percent) have a bachelor's degree or advanced degree.

Nearly all residents of Bowie-Mitchellville and Vicinity (95 percent) have at least a high school degree, compared to 87 percent in Prince George's County. Figure 4. Population 25+ by Educational Attainment in Bowie-Mitchellville and Vicinity and Prince George's County (2018) includes a detailed breakdown of educational attainment in the master plan area and Prince George's County.

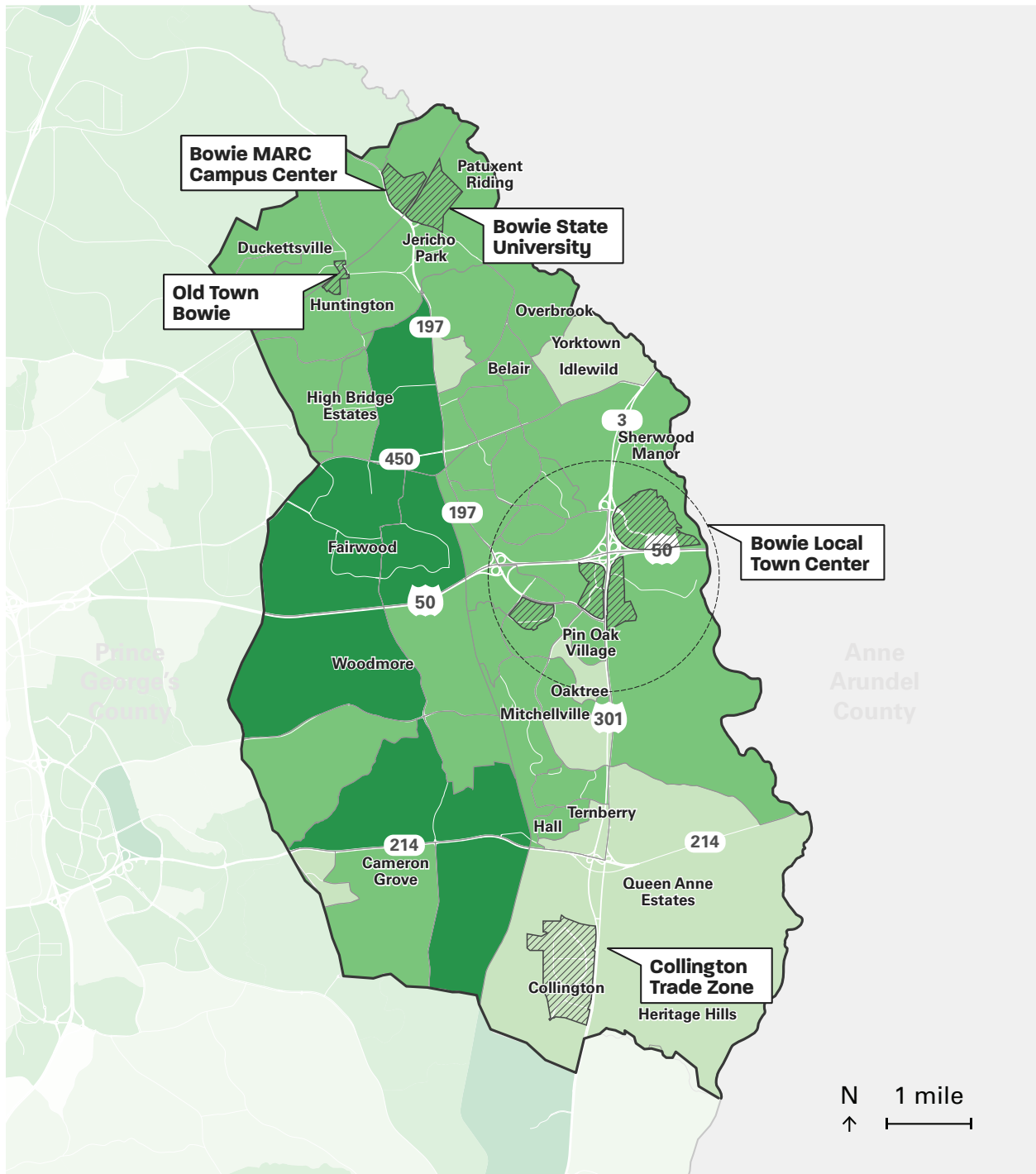
The graphs in this section examine the rates of educational attainment across the master plan area. In general, the share of residents over 25 with a bachelor's degree or more advanced degree varies across the master plan area.

Educational attainment rates in Bowie-Mitchellville and Vicinity are highest in areas where new development has occurred (particularly along the Church Road corridor), where between 60 and 80 percent of residents over age 25 have a bachelor's degree or higher in many census blocks west of MD 197.

Educational attainment rates are lowest in the rural agricultural part of the master plan area, near the Collington Trade Zone and east of US 301. Otherwise, rates of educational attainment are relatively even across the master plan area, in particular in the City of Bowie itself, where census blocks tend to have rates of between 40 and 60 percent of residents above the age of 25 with a bachelor's degree or higher.

New development within the master plan area, including mixed-use nodes with diverse retail offerings, can cater to the preferences of the highly educated residents with disposable income that reside in many of Bowie-Mitchellville and Vicinity's neighborhoods.

Map 10. Educational Attainment in Bowie-Mitchellville and Vicinity (2018)

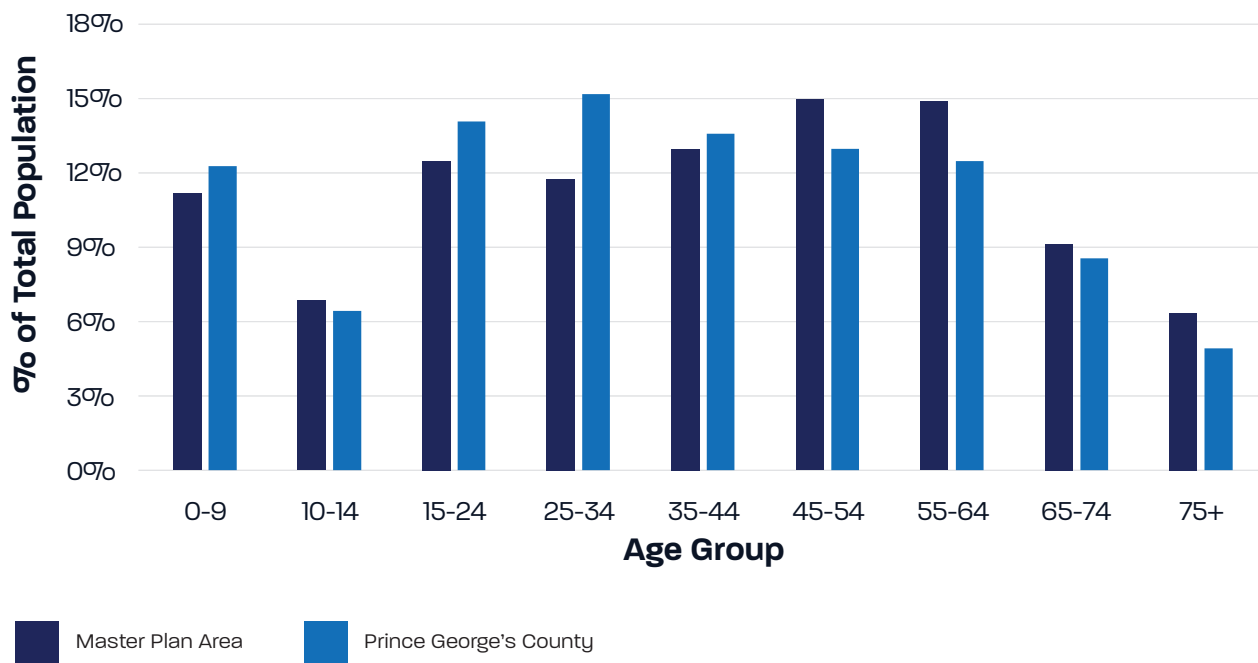


Percent of Residents Whose Minimum Level of Education Attained is a Bachelor's Degree



Source: U.S. Census Bureau, 2018 5-year American Community Survey, Tiger LINE Geographies.

Figure 5. Population by Age in Bowie-Mitchellville and Vicinity and Prince George's County (2018)



Source: U.S. Census Bureau, 2010 and 2018 5-year American Community Survey.

The majority of recent population growth in Bowie-Mitchellville and Vicinity can be attributed to an increase in young professionals and seniors. This points to the importance of considering the evolving needs of these groups in master planning efforts.

AGE, RACE, AND ETHNICITY

The master plan area is comprised mostly of an older population, with 45 percent of the population aged 45 and above.

Prince George's County has an overall younger population than the Bowie-Mitchellville and Vicinity area, with 29 percent of the County's population falling between ages 15 and 34, compared to 24 percent of Bowie-Mitchellville and Vicinity area residents. The single-family suburban neighborhoods that characterize the master plan area reflect the preferences of these older residents who are more likely to be homeowners and have larger households than the County overall.

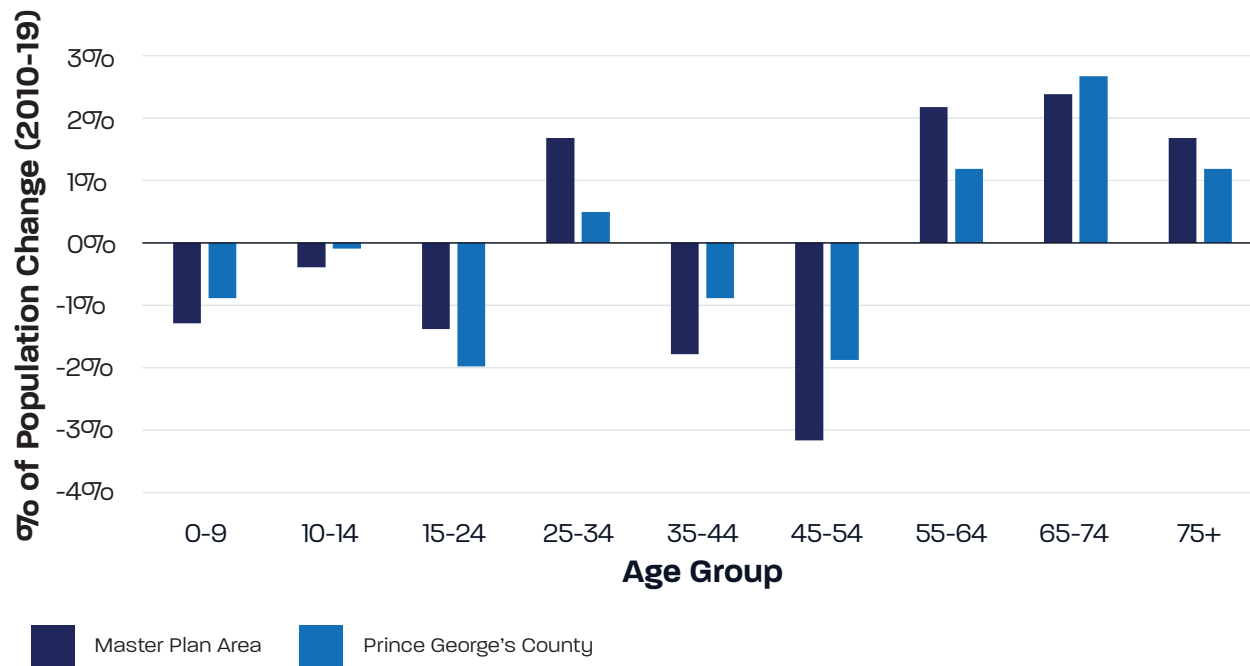
Recent population growth in both the master plan area and County has been driven by gains of people aged

55 and older, with the largest growth coming from increases in people between ages 65 and 74.

The growth and decline of different age groups in the master plan area and County can inform future planning efforts. Between 2010 and 2018 both the master plan area and Prince George's County saw population decreases in residents under the age of 55, with the only exception being people between the ages of 25 and 34. The majority of recent population growth in Bowie-Mitchellville and Vicinity can be attributed to an increase in young professionals and seniors. This points to the importance of considering the evolving needs of these groups in master planning efforts.

Seniors and the growing population of millennial adults aged 25–34 are distributed somewhat differently

Figure 6. Population Growth or Decline by Age in Bowie-Mitchellville and Vicinity and Prince George's County (2010–2018)



Source: U.S. Census Bureau, 2010 and 2018 5-year American Community Survey.

throughout the master plan area. Millennial residents are distributed evenly throughout the master plan area, with no clear geographic trend. In terms of absolute number of residents, there is some greater concentrations of millennial adults aged 25–34 seen in the Church Road corridor north of US 50, as well as in the northern part of the master plan area near Bowie State University.

There is also some concentration of millennial residents seen in the Bowie Local Town Center, where multifamily housing is concentrated within the master plan area. This largely follows overall population density patterns.

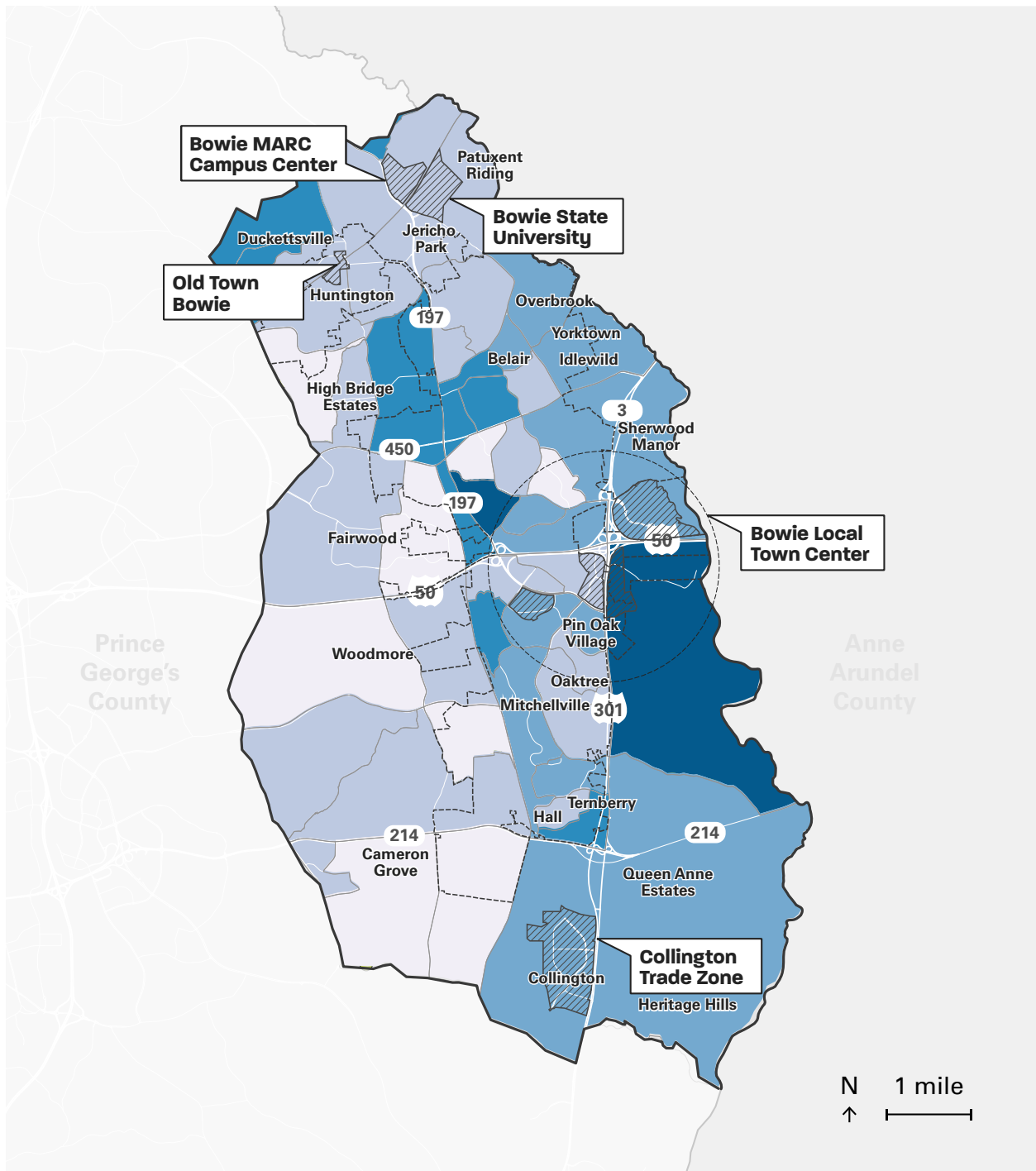
The highest concentration of residents over the age of 55 is in the vicinity of Cameron Grove, a 55-and-up retirement community in the southwest of the master plan area.

The distribution of these two age groups is visualized in Map 11. Distribution of Young Adults in Bowie-Mitchellville and Vicinity (2018) and Map 12. Distribution of Senior Residents in Bowie-Mitchellville and Vicinity (2018).



Source: Monkeybusinessimages, iStock.

Map 11. Distribution of Young Adults in Bowie-Mitchellville and Vicinity (2018)

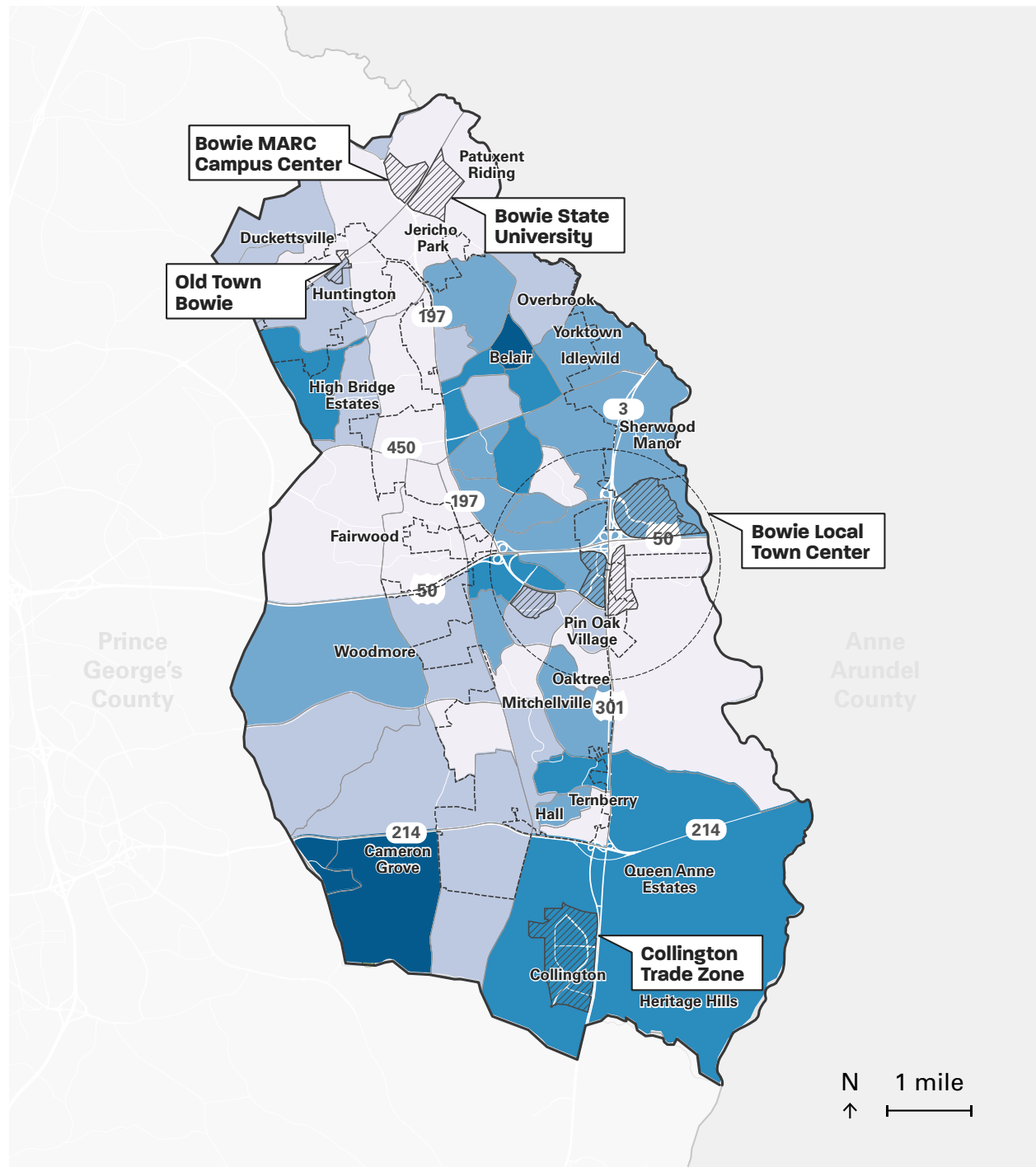


Young Adult Population—% Ages 25 to 34



Source: U.S. Census Bureau, 2010 and 2018 5-year American Community Survey.

Map 12. Distribution of Seniors in Bowie-Mitchellville and Vicinity (2018)

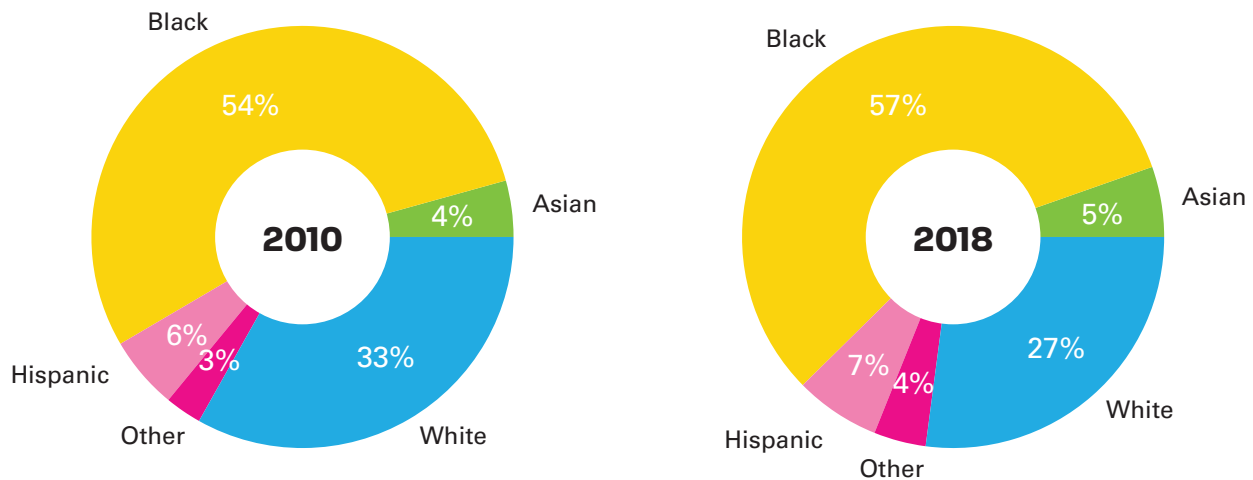


Senior Population—% Age 65 and Above



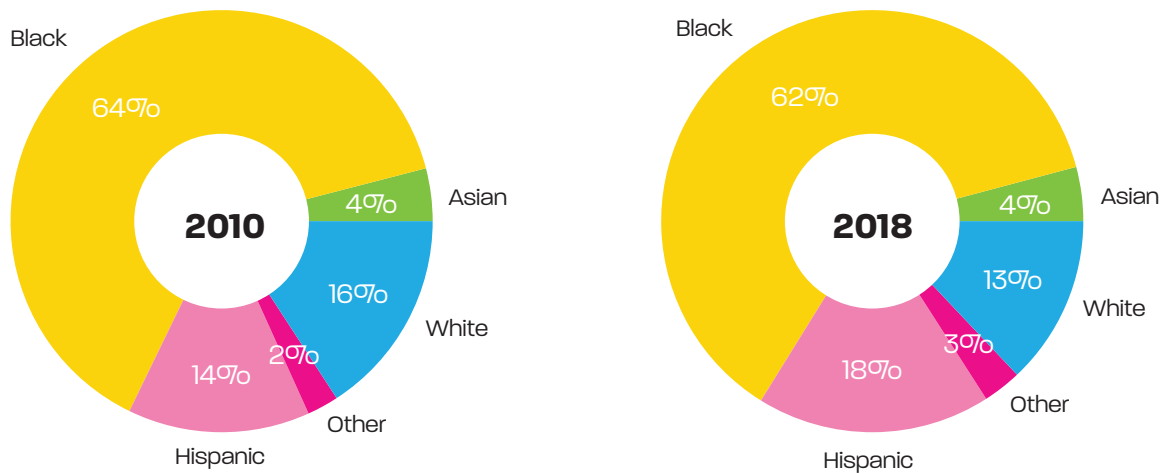
Source: U.S. Census Bureau, 2010 and 2018 5-year American Community Survey.

Figure 7. Race and Ethnicity Demographic Change in Bowie-Mitchellville and Vicinity (2010 and 2018)



Source: U.S. Census Bureau, 2010 and 2018 5-year American Community Survey.

Figure 8. Race and Ethnicity Demographic Change in Prince George's County (2010 and 2018)



Source: U.S. Census Bureau, 2010 and 2018 5-year American Community Survey.

Over half of all residents of the master plan area are Black or African American. That share increased marginally from 54 percent in 2010 to 57 percent today. White residents make-up the second largest racial/ethnic group in the master plan area, at 33 percent in 2010 and 27 percent in 2018.

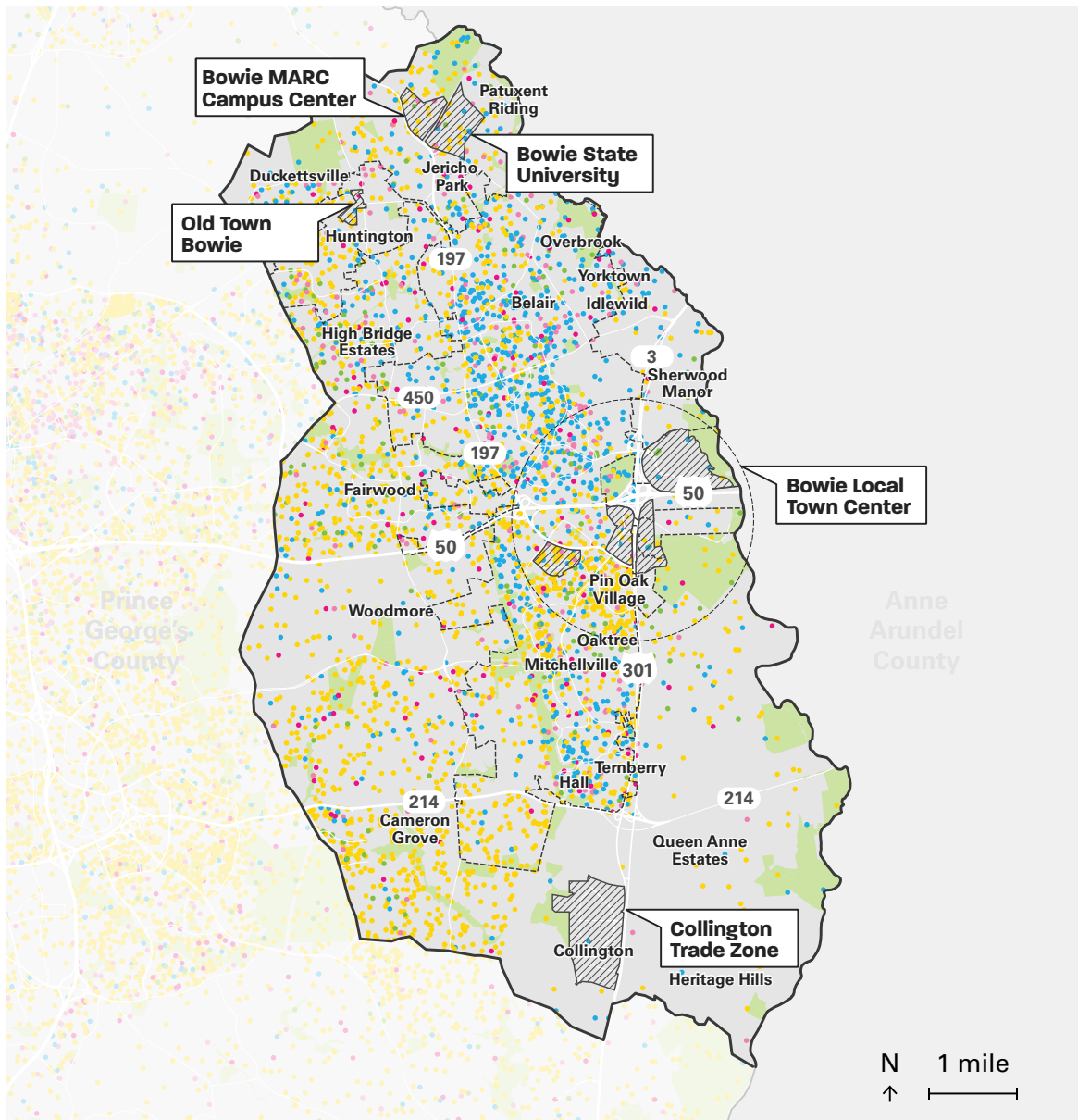
Compared to Prince George's County overall, the master plan area has a proportionately larger White population, and smaller Hispanic/Latino population. The Hispanic/Latino population is the fastest growing racial or ethnic group in the County. This was the only group aside from "Other" to see an increase in its percentage of the County's total population between 2010 and 2018. In Bowie-Mitchellville and Vicinity, however, makes up only 7 percent of the

total population (versus 18 percent of the County's population overall) and has grown only marginally in the last decade.

The change in demographic/ethnic groups between 2010 and 2018 for the master plan area and Prince George's County are summarized in the figures above.

NOTE: In this analysis, Hispanic includes residents of any race who identify as Hispanic. The "Other" category includes residents who identify as multiple races (non-Hispanic), American Indian, and Pacific Islander. The White, Black, and Asian categories indicate residents who identify as those races alone.

Map 13. Bowie-Mitchellville and Vicinity Race and Ethnicity Demographic Composition (2018)



Source: U.S. Census Bureau, 2018 5-year American Community Survey, Tiger LINE Geographies.

The map above examines geographic patterns in the distribution of residents by race or ethnic group. Black residents are spread relatively uniformly throughout the master plan area, except within the City of Bowie, particularly north of US 50 where residents are predominately White.

Further, residents living in the Bowie Town Center townhouses, just south and west of the juncture of US 50 and US 301, are primarily Black. Similarly, residents living at the Cameron Grove Condominiums, in the southwest of the master plan area are primarily Black.

Figure 9. Bowie-Mitchellville and Vicinity Demographic Change, 2010–2018

	Asian	Black	Hispanic	Other	White
2010	3,470	43,549	4,500	2,257	26,668
	4%	54%	6%	3%	33%
2018	4,664	49,334	5,666	3,456	23,440
	5%	57%	7%	4%	27%

U.S. Census Bureau, 2018 and 2010 5-year American Community Survey.

Figure 10. Prince George's County Demographic Change, 2010–2018

	Asian	Black	Hispanic	Other	White
2010	34,464	545,084	119,265	20,633	135,276
	4%	64%	14%	2%	16%
2018	37,513	562,046	162,372	26,770	117,501
	4%	62%	18%	3%	13%

U.S. Census Bureau, 2018 and 2010 5-year American Community Survey.

Together, these findings and those examined in previous subsections suggest that residents moving into the newer developments along the Church Road corridor and in new multifamily developments are primarily middle-class, well-educated Black families.

Today, 85 percent of Bowie-Mitchellville and Vicinity residents were born in the United States, compared to 78 percent in Prince George's County. The share of native and foreign-born residents has not changed dramatically since 2010 in either the master plan area or Prince George's County overall: in 2010, 87 percent of Bowie-Mitchellville and Vicinity residents, and 81 percent of Prince George's County residents, were born in the US.

POPULATION DISTRIBUTION AND DENSITY

In total, about 86,500 people reside in the Bowie-Mitchellville and Vicinity area, 58,400 of whom live in the City of Bowie itself as illustrated in Map 14. Population Distribution in Bowie-Mitchellville and Vicinity.

Since 2010, the Bowie-Mitchellville and Vicinity population has grown by 7.6 percent, adding about 6,000 residents. Map 15. Population Change in Bowie-Mitchellville and Vicinity (2010–2018) shows population change throughout the master plan area, by census

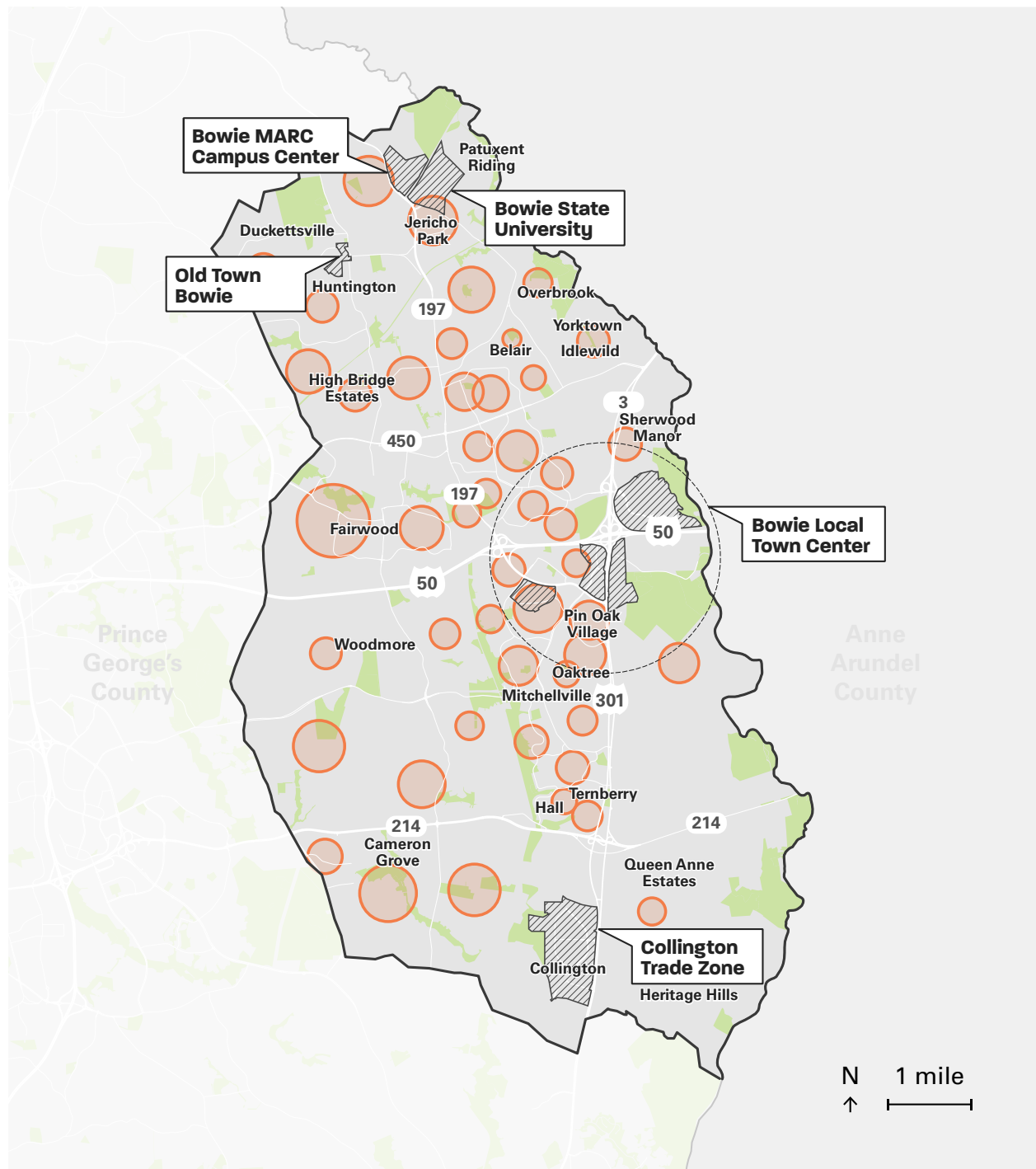
block group, between 2010 and 2018. Orange circles highlight areas where there has been population growth, while pink circles indicate areas that have seen population decline during this period. The larger the circle, the greater the quantity of change.

Population growth between 2010 and 2018 was concentrated along and near Church Road, where the large majority of residential units have been added. The greatest single area of population growth between 2010 and 2018 (and only census block group with an increase of 2,000 or more residents) is in Fairwood, near the intersection of Church Road and Fairwood Parkway, between US 50 and MD 450. There is a cluster of townhouse communities in Fairwood, including two developments completed in or after 2010: the Bounty at Fairwood (78 units) and the Sanctuary at Fairwood (87 units). Development is also planned for the 20-unit Fairwood Townhomes and there has been significant growth on the east side of Church Road in Fairwood.

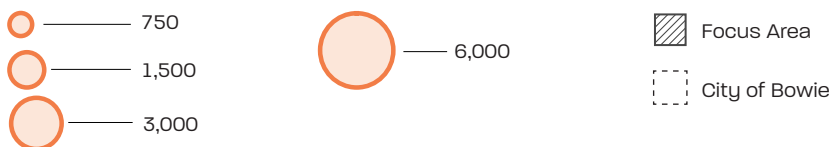
The block group that includes Oak Creek Golf Club, south of MD 214, also saw an increase in population during this period.

There was also an increase of over 500 residents in the block group just south of Bowie State University. This area may see continued population growth due

Map 14. Population Distribution in Bowie-Mitchellville and Vicinity (2010–2018)

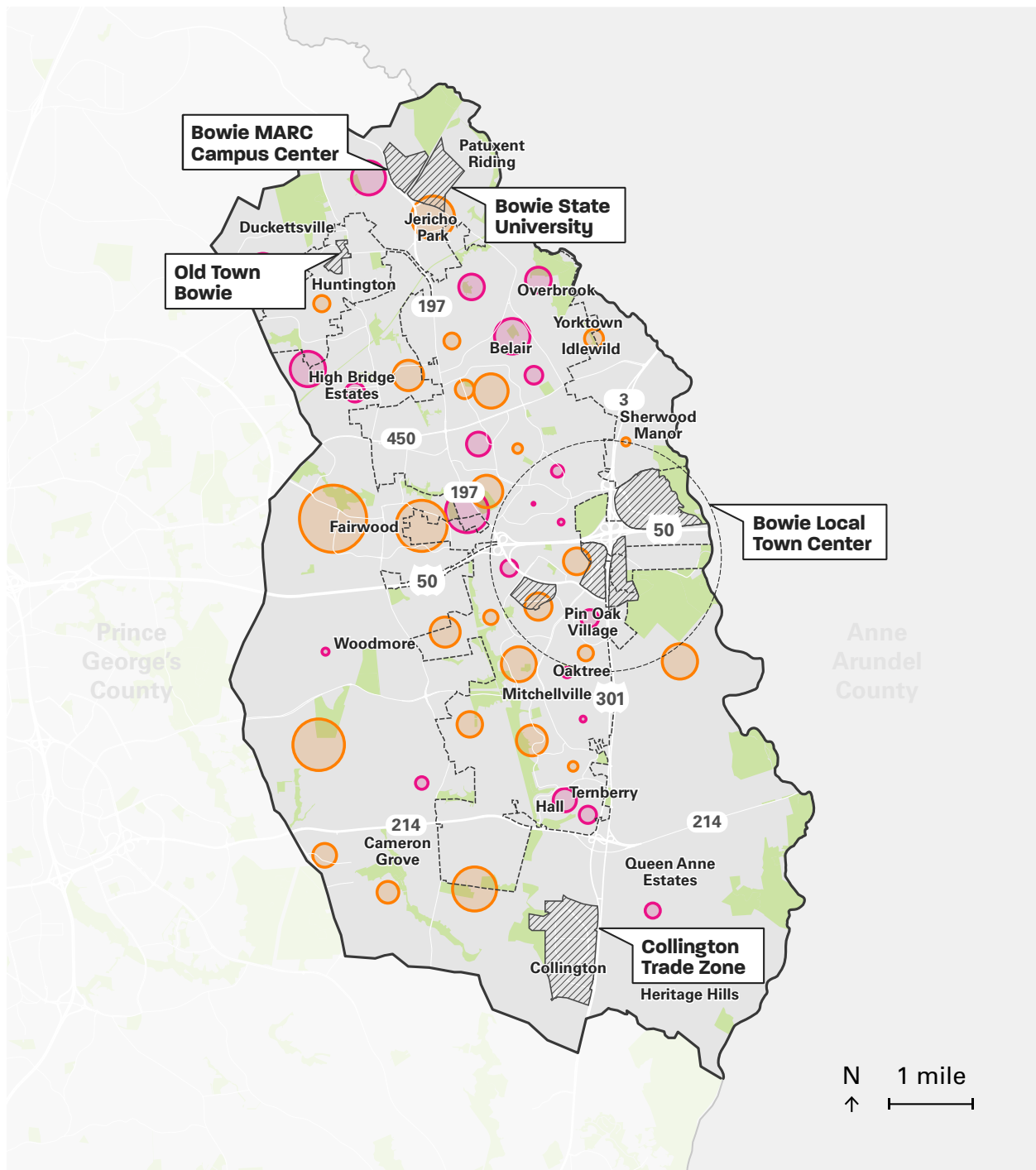


Total Population

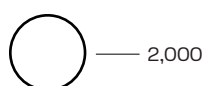


Source: U.S. Census Bureau, 2018 and 2010 5-year American Community Survey, Tiger LINE Geographies.

Map 15. Population Change in Bowie-Mitchellville and Vicinity (2010–2018)



Population Change



Population Growth

Population Loss

Focus Area

City of Bowie

Source: U.S. Census Bureau, 2018 and 2010 5-year American Community Survey, Tiger LINE Geographies.

to increased on-campus housing proposed in the 2010 *Bowie State University Facilities Master Plan*, which calls for three new 300-bed residence halls.¹

Population change in the City of Bowie has been relatively flat or declining. This is most likely the result of an aging population and smaller household sizes.

The population of Bowie-Mitchellville and Vicinity increased significantly between 2000 and 2010, 17 percent overall. The pace of growth slowed between 2010 and 2019 but remained strong at around 10 percent.

Following this trend, the master plan area's population is projected to increase through 2024, though only modestly. The housing and development trends behind this growth are explored in greater detail in Section 2.2. Housing and Neighborhoods and Section 2.4. Land Use, Zoning, and Urban Form.

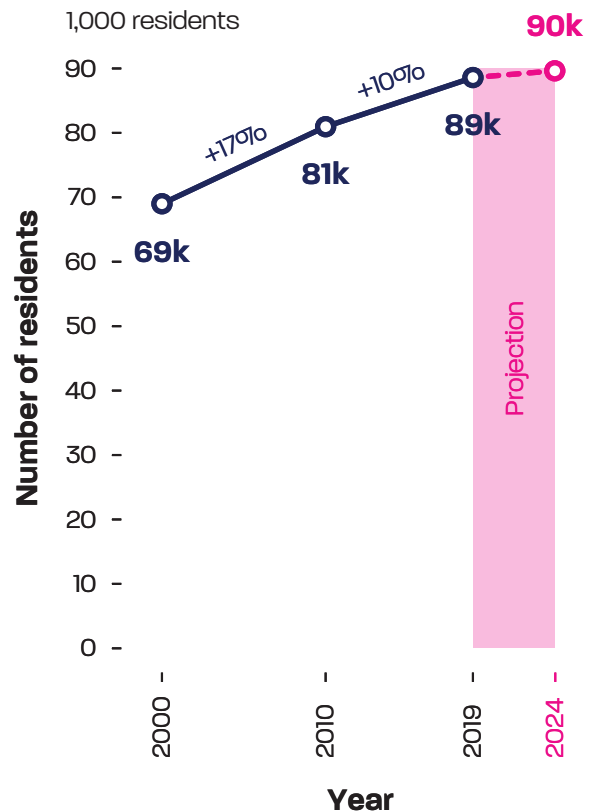
Development Density

As of 2018, there are an estimated 31,000 dwelling units in the Bowie-Mitchellville and Vicinity area, housing approximately 87,000 residents in an area of about 37,700 acres. This comes out to fewer than one dwelling unit per acre. This is considered quite low. A density of about one to three dwelling units per acre is considered to be low-density suburban. Less than that is considered exurban or rural.

Map 16. Dwelling Unit Density in Prince George's County (2018) shows that dwelling unit density is low—less than three dwelling units per acre—in much of the County, particularly outside of I-495 (Capital Beltway). Dwelling unit density in Prince George's County is greatest within the Capital Beltway.

In the Bowie-Mitchellville and Vicinity master plan area, dwelling unit density and population density are greatest within the City of Bowie. While development since 2010 has been concentrated around the Church Road Corridor, this area remains very low density.

Figure 11. Historical and Projected Population in Bowie-Mitchellville and Vicinity (2000–2024)



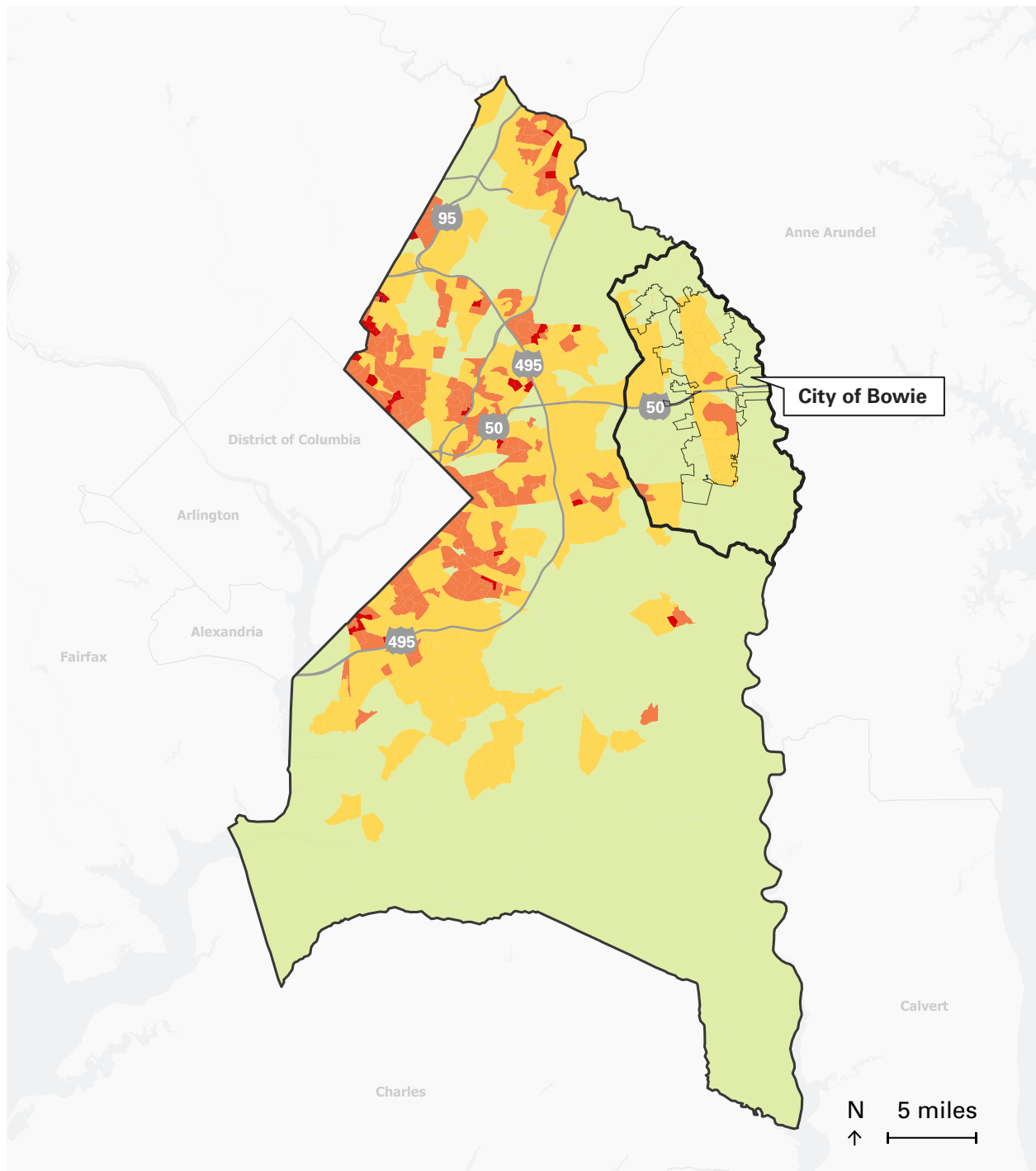
Source: Neustar Data 2019.

¹ See the 2010 Bowie State University Facilities Master Plan at: <https://bowiestate.edu/images/files/bsu-facilities-master-plan1.pdf>.



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Map 16. Dwelling Unit Density in Prince George's County (2018)



Dwelling Units per Acre (Gross)

30–100

10–20

1–3

City of Bowie

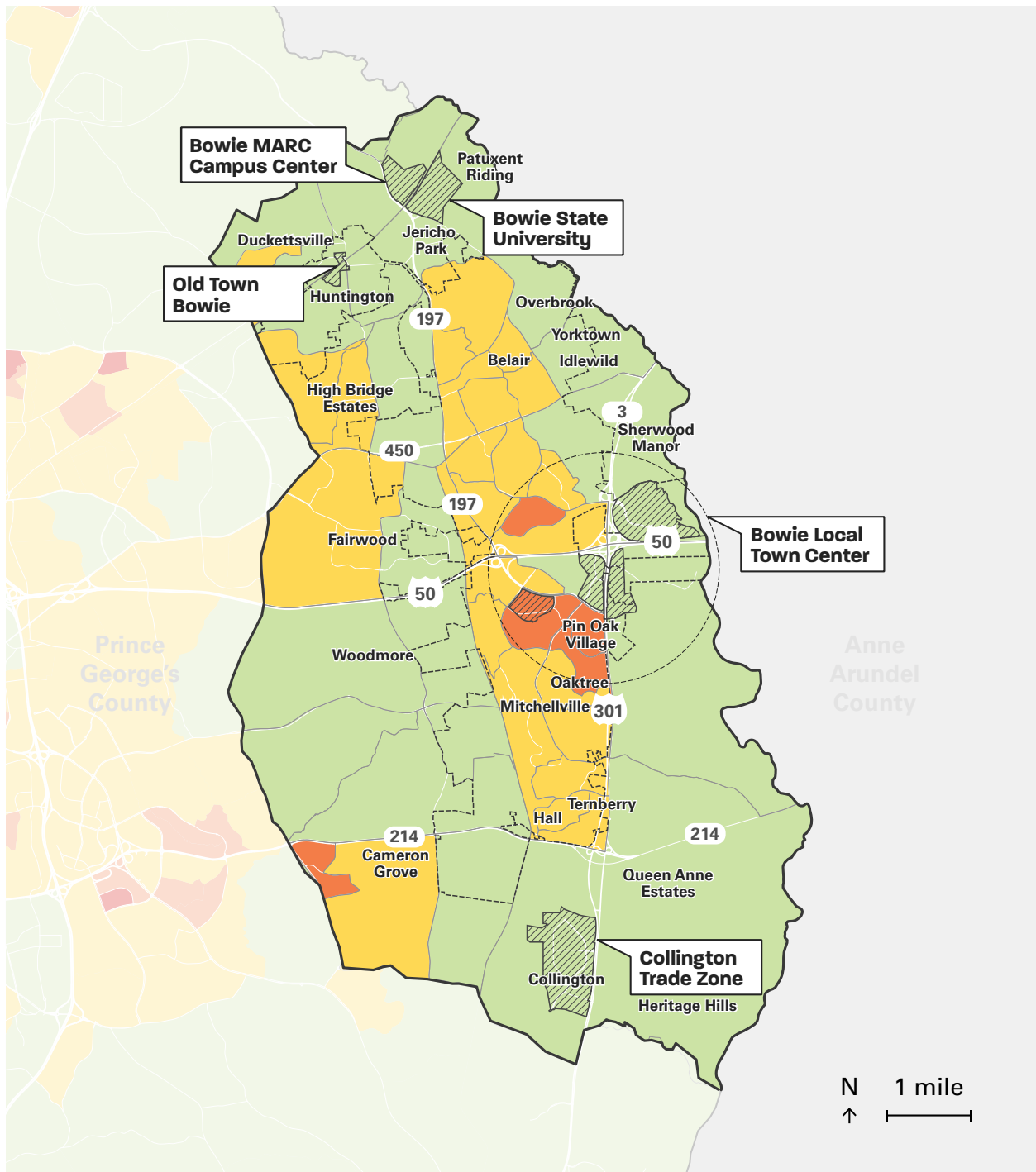
20–30

3–10

0–1

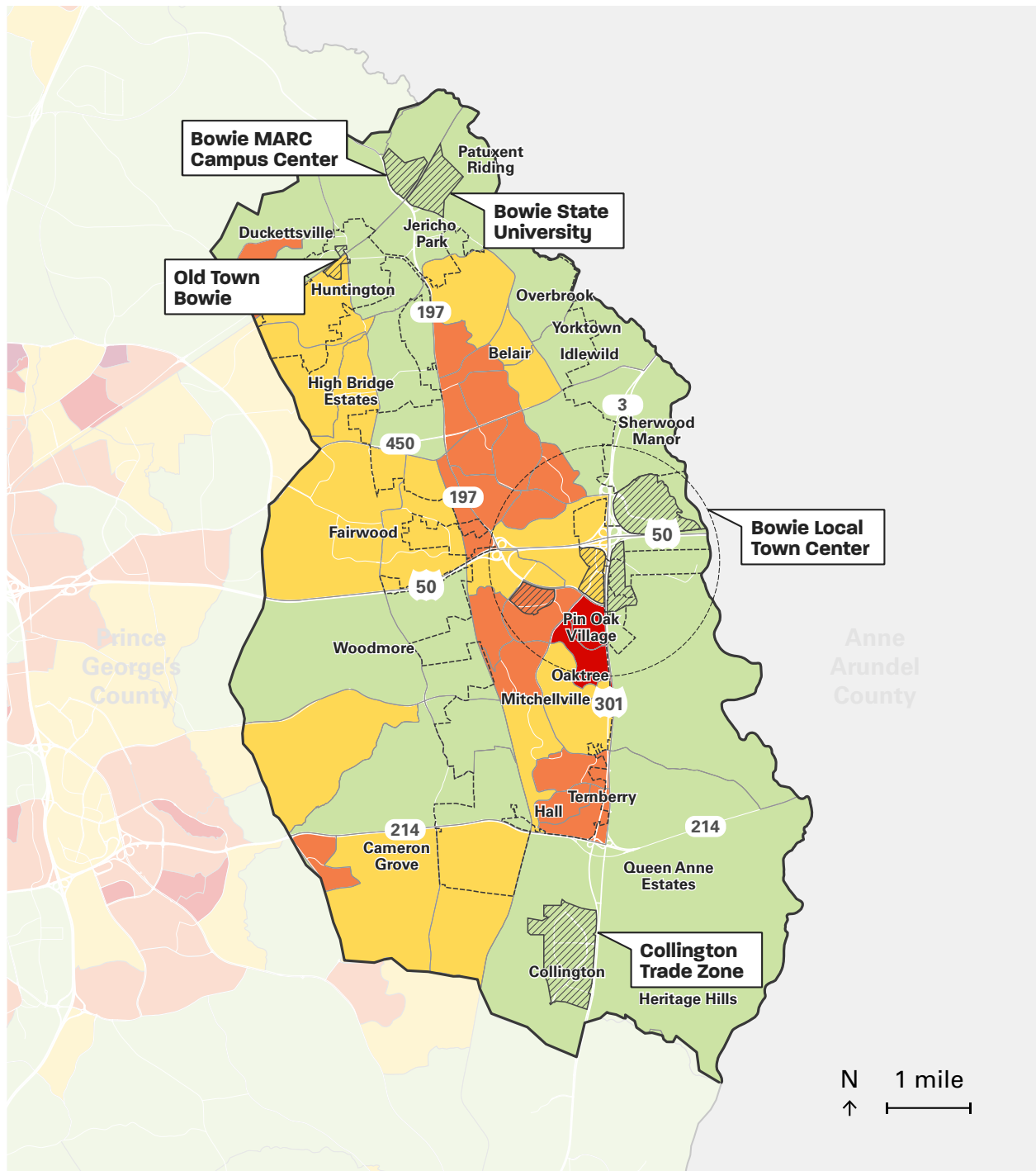
Source: U.S. Census Bureau, 2018 5-year American Community Survey, Tiger LINE Geographies.

Map 17. Dwelling Units Built per Acre, Housing Density in Bowie-Mitchellville and Vicinity

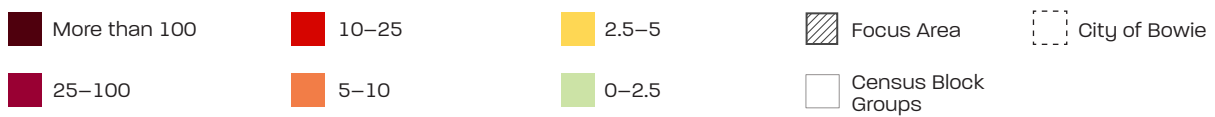


Source: U.S. Census Bureau, 2018 5-year American Community Survey, Tiger LINE Geographies.

Map 18. Population Density in Bowie-Mitchellville and Vicinity

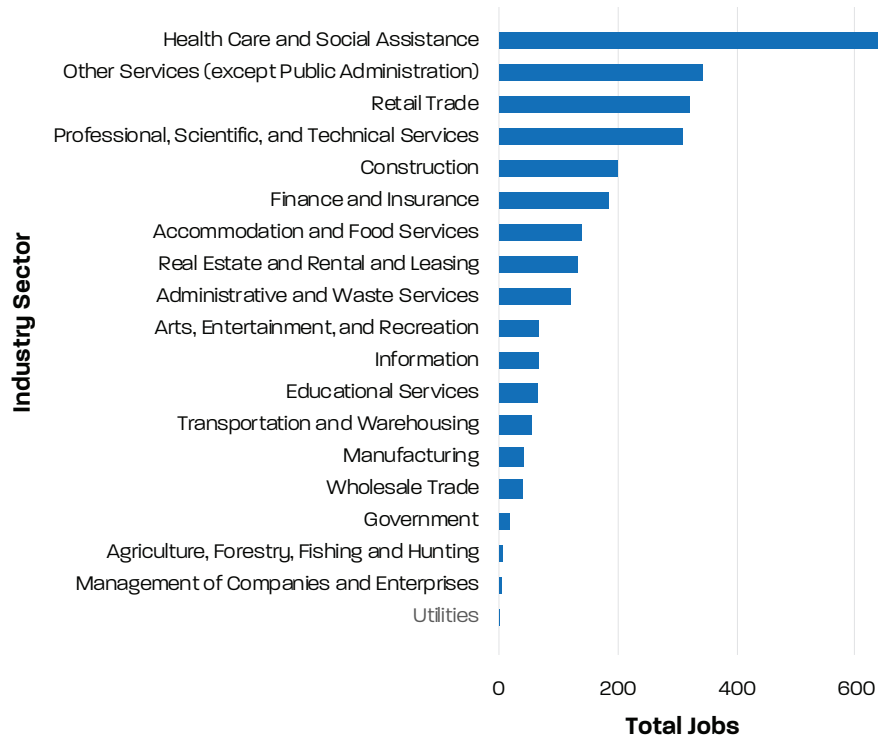


Persons per Acre



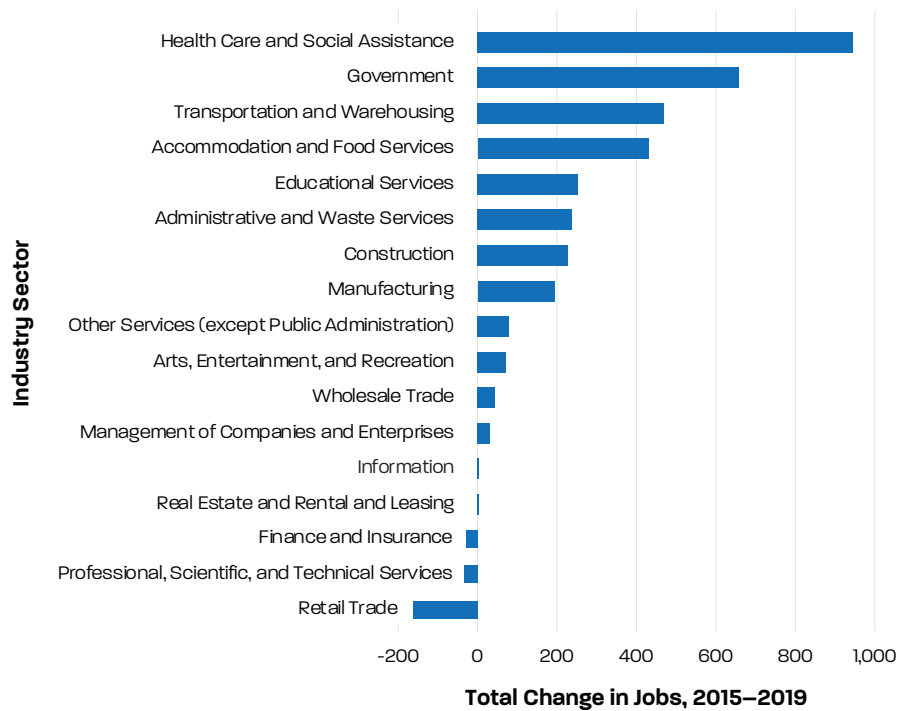
Source: Census Bureau, 2018 5-year American Community Survey, Tiger LINE Geographies.

Figure 12. Total Jobs by Industry Sector in Bowie-Mitchellville and Vicinity (2019)



Source: Neustar Business NAICS Summary, 2019.

Figure 13. Employment Growth by Total Change in Jobs in Bowie-Mitchellville and Vicinity and Largo and Kettering (2015–2019)



Source: Neustar Business NAICS Summary, 2019

Note: Analysis includes neighborhoods outside of the master plan area in zip code 20774, including Largo and Kettering.



Source: M-NCPPC.

Bowie-Mitchellville and Vicinity residents enjoying Allen Pond Park.

Employment Profile

EMPLOYMENT BY INDUSTRY

The Bowie master plan area has a total of 28,000 jobs, representing 10.4 percent of total jobs within Prince George's County. Nearly a fourth of all businesses in the master plan area belong to the Health Care sector, and over 14 percent of employees in the master plan area work in this sector. Trailing behind, between 300 and 400 jobs, are those classified as "Other Services" (which is wide ranging and includes religious services, automotive repairs, social advocacy, and dry cleaning, and excludes public administration), Retail Trade, and Professional, Scientific, and Technical services.

While Retail Trade makes up a smaller percentage of total businesses in the master plan area, this sector has the largest share of employees, at over 20 percent. However, the master plan area is losing jobs in retail; in the last five years, the local retail job market has shrunk by nearly 200 jobs.

EMPLOYMENT GROWTH

The Health Care sector also experienced the largest total job growth between 2015 and 2019, adding over 900 new jobs to both the master plan area and neighboring Largo community. Although jobs in the retail sector make up the highest percentage of jobs in the master plan area today, this sector has seen the greatest decrease in jobs in the last five years, as jobs in health care and social assistance have grown. Government jobs represent another growing sector in the master plan area—the only sector other than Health Care to have added over 600 new jobs in the last five years.

Discussion of Challenges and Opportunities

GROWING MILLENNIAL AND SENIOR POPULATIONS

With young millennial adults (ages 25–34) and seniors driving population growth in the master plan area, it is important to ensure that future development reflects the preferences of both target groups. One opportunity is to ensure that future development reflect the housing preferences and needs of seniors and young professionals in order to maintain economic competitiveness.

Bowie's aging population is a challenge in terms of attracting employers and building an employment base in the master plan area. The bulk of recent population gains have come from residents aged 55 and above and, while there was an uptick in young adults aged 25–34, Bowie-Mitchellville and Vicinity lost residents aged 35–54 between 2010 and 2018. This trend is projected to continue into the future, with projected growth from 2019–2024 being driven by residents aged 65 and up, many of whom will likely be retired.

POCKETS OF ECONOMIC CHALLENGE AND HOUSING BURDEN

While the master plan area has a considerably higher median household income than Prince George's County overall, there are still pockets within Bowie-Mitchellville and Vicinity where residents experience greater economic challenges, including lower household incomes and higher housing cost-burden. Census block groups within the City of Bowie are more likely to fall below the master plan area's median household income. Residents within the City of Bowie are also more likely to experience housing burden (both as renters and homeowners) than the rest of the master plan area.

The census block group containing Cameron Grove, in the southwest corner of the master plan area, sees housing cost-burden² for renters, meaning most renters spend over 30 percent of monthly income on rent. This census block group is also one of only three in the master plan area whose median household income is lower than the countywide median. The large concentration of senior residents living in this block, many presumably retired or on fixed incomes, may account for some of the economic challenges here.

Housing cost-burden and median household income is discussed in greater detail in Section 2.2. Housing and Neighborhoods.

MIXED-USE DEVELOPMENT

According to Plan 2035, economic growth and development across Prince George's County should primarily focus on strengthening established neighborhoods to ensure existing residents live in high-quality, healthy communities. Within the master plan area, existing neighborhoods can be strengthened by providing a diversity of housing options beyond the current predominance of subdivisions of detached single-family homes, particularly with options geared to Bowie's growing cohort of young millennial adult residents between ages 25 and 34 and seniors aged 55 and older. These populations often prefer walkable communities, so mixed-use development with a range of different residential typologies like apartments and townhouses, in addition to complementary office and retail space, can create new nodes where residents have the opportunity to "live, work, and play" within their neighborhood. Sites for infill development along existing corridors in the master plan area, which are largely characterized by big-box retail stores and surface parking lots, provide opportunities to leverage existing infrastructure and accommodate increased density and new mixed-use development.

HEALTH CARE SECTOR

The growing Health Care and Social Assistance sector presents an opportunity to the master plan area, which can position itself as an employment center and add mixed-use developments with accessibility to work places in Health Care and Social Assistance, as well as Government jobs which make up a smaller but growing share of local employment.

Bowie-Mitchellville and Vicinity is not competitive as a Class A office market. The master plan area's growing healthcare sector represents a strong opportunity for growing its employment base, with a focus on developing medical office space.

² Cost-burden: When a household pays more than 30 percent of their gross income on housing, including utilities, they are "cost-burdened." Cost-burdened households have less for other essentials, like food, clothing, transportation, and medical care.





Source: M-NCPPC.

Townhomes in the Fairwood neighborhood of Bowie-Mitchellville and Vicinity.

2.2 Housing and Neighborhoods



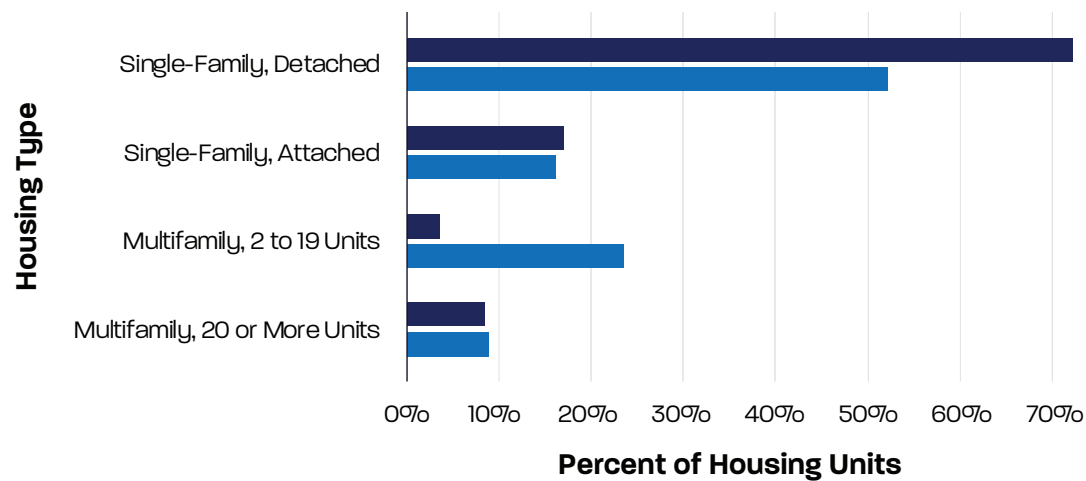
The Bowie-Mitchellville and Vicinity master plan area is largely composed of low-density neighborhoods of single-family detached homes. To provide more diversity in housing product and offer options suited to growing segments of the population, particularly young professionals and senior residents, new residential options like townhouses and multifamily apartments should be encouraged to fill existing gaps in available housing and help establish walkable, mixed-use communities. Young professionals and senior residents today are increasingly opting for more walkable, mixed-use neighborhoods rather than low-density suburbs—a trend present throughout the Washington region. Developing new multifamily and townhouse product in Bowie is a way to deliver housing options tailored to the preferences of these growing cohorts, while also building the residential density needed to create walkable communities, concentrate activity within

specific nodes, and establish the residential foundation needed to attract commercial tenants. With office and retail tenants typically following the location patterns of their current and prospective employees and customers, Bowie must ensure the residential product offered within Bowie is attractive to young professionals and seniors, who will in turn influence the locational decisions of employers and retailers.

COVERED IN THIS SECTION:

- Housing Stock
- Foreclosure Rates
- Development Trends
- Housing Market Overview
- Market Performance
- Affordable Housing

Figure 14. Housing Stock by Unit Type (2019)



Source: ESRI Business Analyst, 2019.

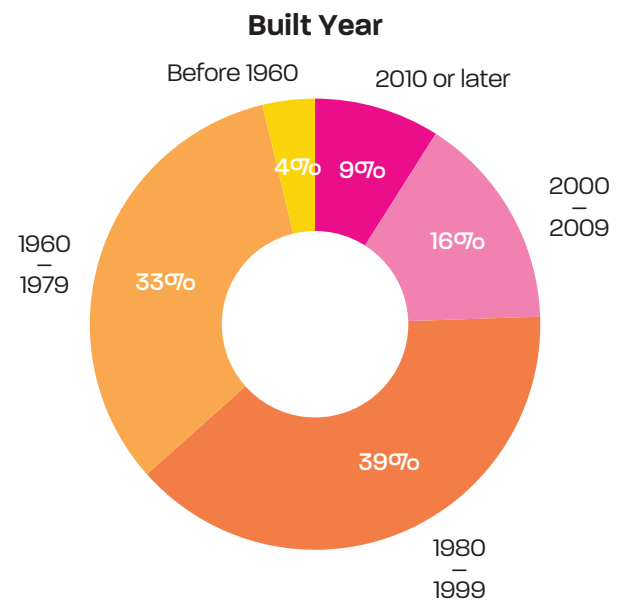
Plan 2035 envisions Prince George’s County as a regional destination with strong, healthy communities; a competitive and innovative economy; and walkable, mixed-use centers. The master plan area can help realize Plan 2035’s vision by focusing on opportunities for residential infill within existing nodes, such as Bowie Local Town Center and the Bowie MARC Campus Center. Adding multifamily and townhouse units to these existing commercial centers is a way to create mixed-use communities, while expanding the residential base in these nodes of activity is critical to attracting private development activity and investment to build additional office and retail. Infill development brings further benefit by negating the need to build new infrastructure and reducing degradation of the County’s natural resources. Bowie-Mitchellville and Vicinity’s undeveloped areas can be relieved from future single-family greenfield development pressures by targeting infill development. New multifamily and townhouse units should be positioned in proximity to existing employment centers and in locations that offer walkable access to amenities like open space, trails, retail, and restaurants, which will help strengthen neighborhood connectivity and promote walkability in line with Plan 2035’s vision.

Housing Stock

The majority of Bowie-Mitchellville and Vicinity’s neighborhoods are made up of single-family homes, with single-family detached homes accounting for 71 percent of all housing stock in the master plan area.

As a largely suburban area, it is unsurprising that most of the housing stock in Bowie-Mitchellville and Vicinity is single-family detached homes. This also tracks with

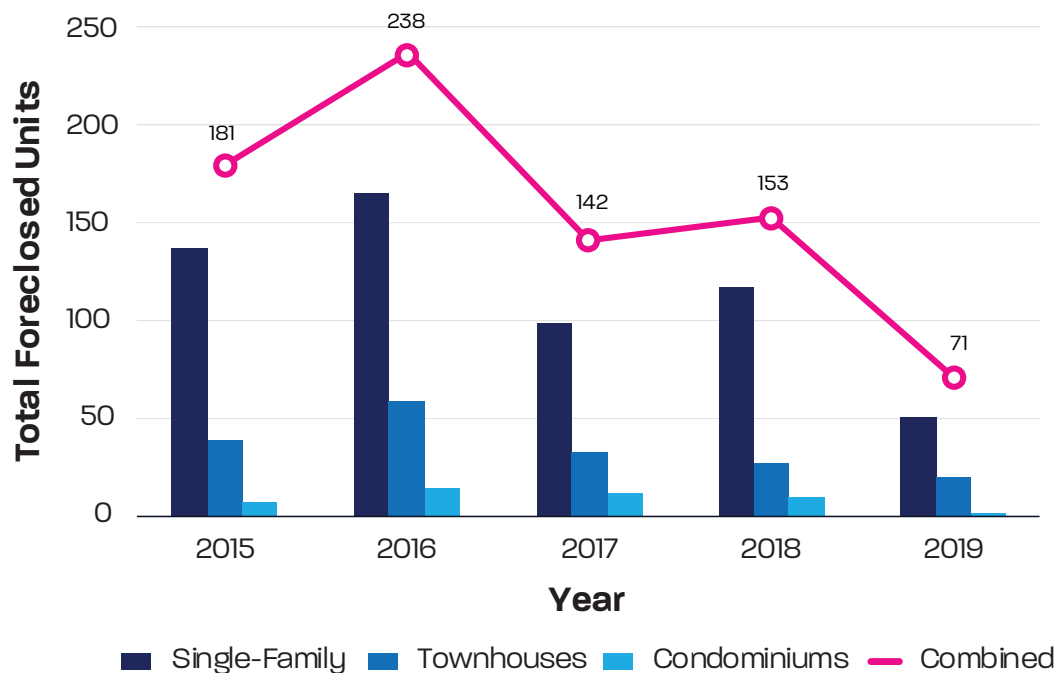
Figure 15. Master Plan Area Housing by Year Built



Source: Neustar, 2019.

the area’s demographic characteristics, as the master plan area has an older population who are more likely to own homes and have larger families than the County’s population overall. However, with over 1,600 detached single-family homes, 800 townhouses, and 1,800 multifamily units currently in its development pipeline, the master plan area is on track to see large increases in its housing stock across all unit types over the next 10 years. This is especially true for multifamily units—the known pipeline of new multifamily units expected is more than four times greater than the total supply of multifamily units delivered in the last 10 years.

Figure 16. Master Plan Area Foreclosures by Housing Type (2015–2019)



Source: MetroStudy, 2020.

Age of Housing Stock

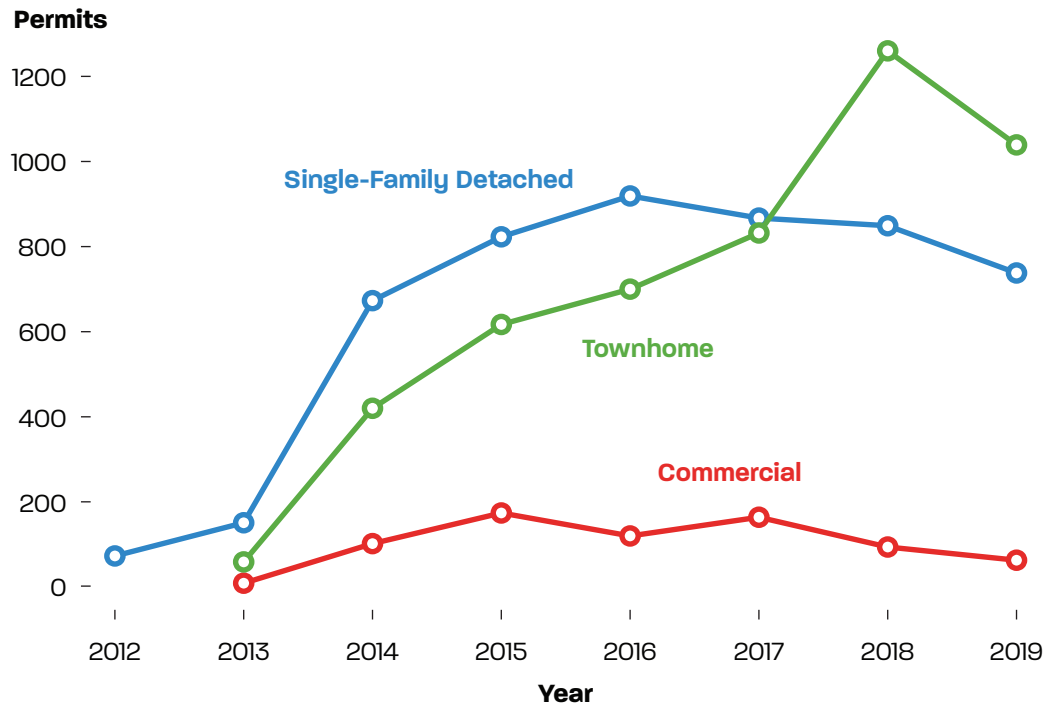
Approximately 75 percent of residential units within the master plan area were built over 20 years ago.

Nine percent of the master plan area's housing stock was built within the past 10 years, consisting primarily of detached single-family residential units. Projects planned by private developers working in the Bowie area are projected to deliver more than 3,000 residential units in the coming years. This planned private development pipeline includes a mix of detached single-family units, as well as a significant complement of townhouses and multifamily units, which will significantly increase the area's multifamily supply. The vast majority of pipeline units—92 percent—are planned as part of the proposed Melford Town Center and South Lake master-planned development projects. The remaining pipeline units are attributable to a variety of smaller scale planned single-family communities.

Foreclosure Rates

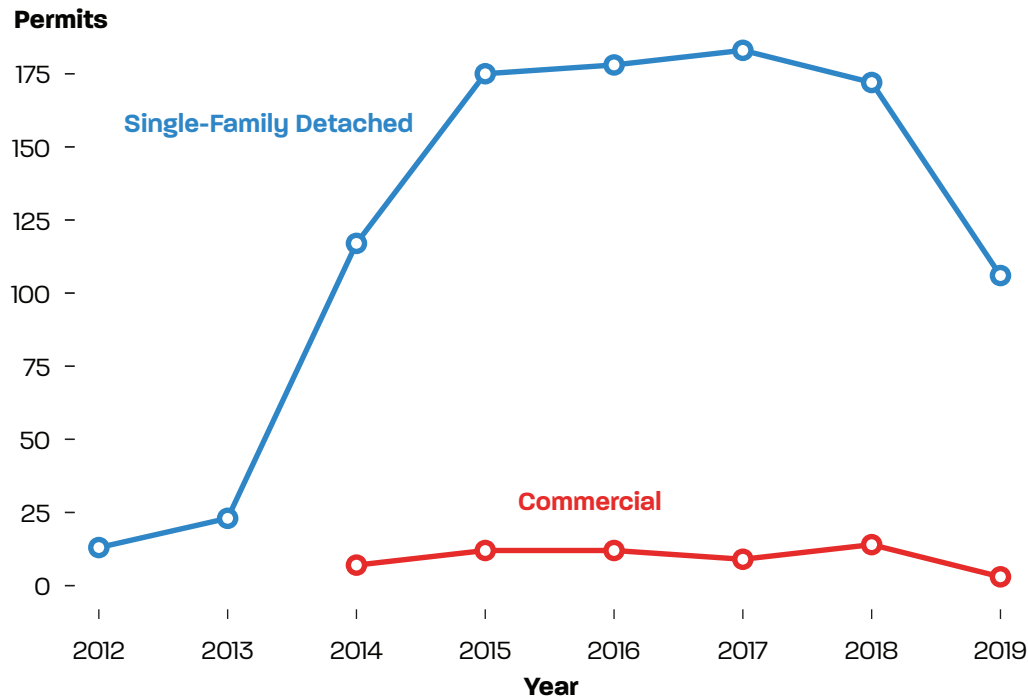
The master plan area had a total of 71 foreclosures in 2019 (MetroStudy), representing a 54 percent decline in total annual foreclosures from 2018. The majority of 2019's foreclosed units were detached single-family homes, comprising 50 of the total 71 foreclosures that year. Total annual foreclosures have generally been trending downward over the past five years, which is one indicator that the housing market is recovering from the 2008 financial crisis that sparked a significant increase in foreclosure activity in the area. This trend is also reflected in Prince George's County overall, which had a foreclosure rate of 1 in every 785 homes in 2019, down from 1 in every 357 homes back in 2016 (ATTOM Data Solutions). Prince George's County was particularly affected by the housing crisis—in 2011, the County's foreclosure rate was 5.3 percent, twice the foreclosure rate of the Washington, D.C. region overall, and around 15 percent of homeowners in the County received notices of intent to foreclose. As a majority minority county, Prince George's County was hit especially hard due to the frequency with which minorities, particularly Black homeowners, were given subprime mortgages. The racial disparities in home lending have been well-documented, and

Figure 17. Prince George's County New Building Permits by Zoning Category (2012–2019)



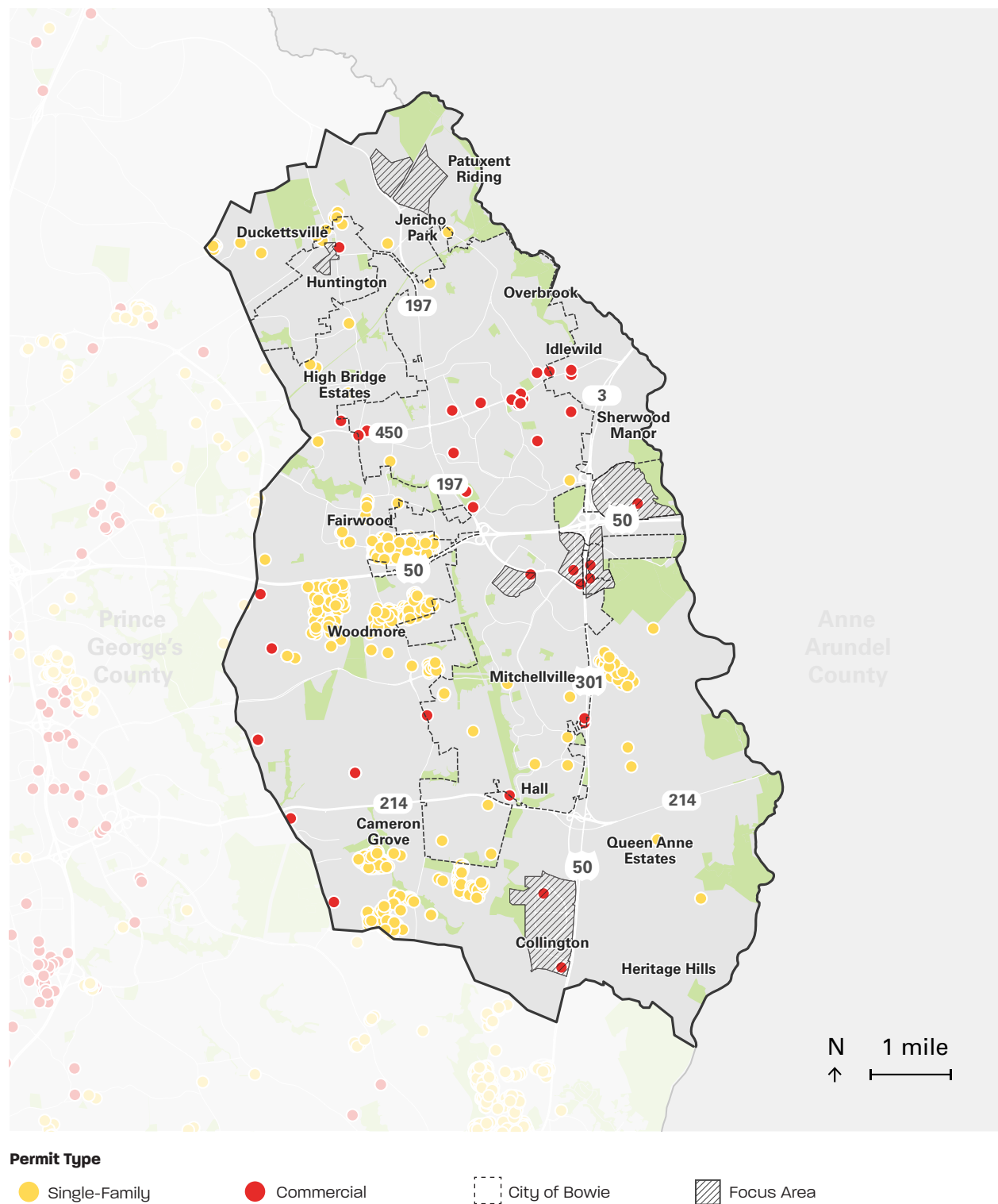
Source: Prince George's County Open Data Building Permits.

Figure 18. Bowie-Mitchellville and Vicinity Master Plan Area New Building Permits by Zoning Category (2012–2019)



Source: Prince George's County Open Data Building Permits.

Map 19. New Construction Permits (2012–2019)



Source: Prince George's County Open Data Building Permits.

these discriminatory lending practices led to the disproportionate impacts experienced by Black homeowners in the County—in the Washington, D.C. region Black homeowners were 20 percent more likely to lose their homes compared to White homeowners with similar incomes—and across the nation.

The County's gradual decrease in its foreclosure rate is reflective of its slow rebound from the impacts the financial crisis had on residents' wealth and their ability to own homes. The housing market in Prince George's County continues to show signs of recovery following the Great Recession, with median home sale prices increasing by 9.3 percent in the fourth quarter of 2016 compared to the same period in 2015. Additionally, the average amount of time homes spent on the market was down 17.3 percent during the fourth quarter of 2016, an indicator of an increase in demand for houses and qualified buyers making purchases. An increase in median sales prices combined with decreases in both total foreclosures and the average time houses remain on the market are just a few of the indicators of the housing market's rebound and highlights residents' ability to purchase homes they are able to afford long-term.

Development Trends

The following charts examine commercial and residential development trends in Prince George's County and the master plan area since 2012, using building permit data published by Prince George's County.

Development in the County and master plan area increased considerably after 2013 and the economic recovery from the 2008 recession began to strengthen. We see the total number of building permits increase from about 250 overall in 2013 to about 1,300 in 2014.

Growth in single-family development was particularly strong in the master plan area.

No townhouse construction has occurred in the Bowie-Mitchellville and Vicinity master plan area since 2012. This is in contrast to the County as a whole, which saw townhouse construction growing with single-family construction through 2017 and overtaking it in 2018 and 2019 by a significant margin.

The large majority of single-family permits in the master plan area were for building in the Church Road corridor, indicated in a dashed gray line in Map 19. New Construction Permits (2012–2019). Commercial development was much more uniformly spread throughout the master plan area. The largest concentration of commercial permits granted in Bowie-Mitchellville and Vicinity are along MD 450 and in the Bowie Town Center.

Overview of Housing Market

Overall, the housing market within the master plan area is relatively healthy and stable. The Bowie-Mitchellville and Vicinity master plan area has undergone limited to no multifamily development in the past 10 years. The two master-planned developments of Melford Town Center and South Lake will add significant new product to the area, including over 1,800 new multifamily units. The performance of these large deliveries will help gauge appetite and depth of demand for future multifamily projects in Bowie.

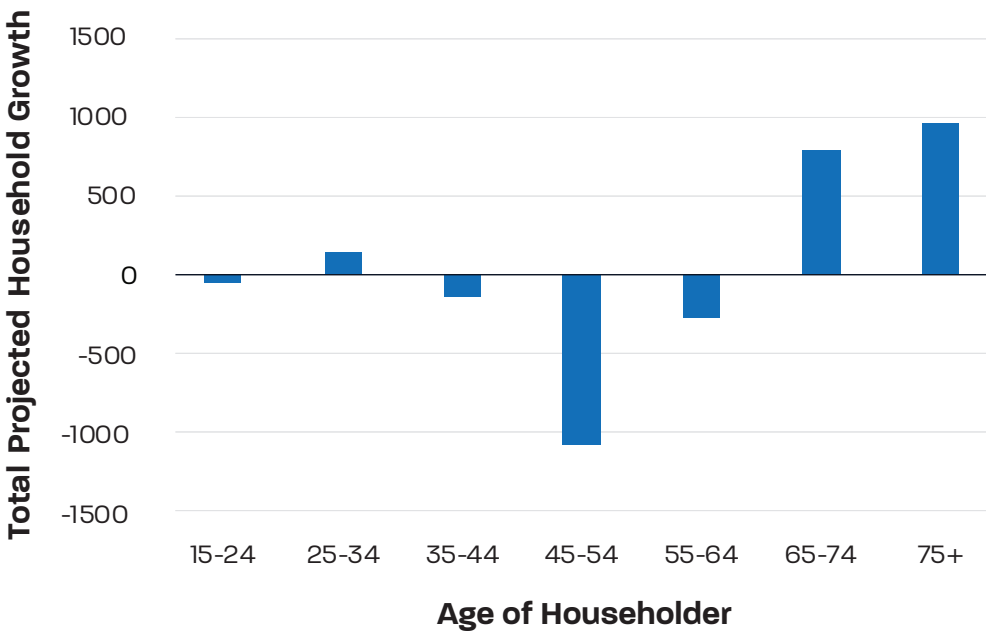
Recent construction of detached single-family homes has been concentrated along Church Road, particularly near the intersection with John Hanson Highway, and new planned developments like Collingbrook Estate will add further subdivisions to the area. Church Road is not one of the area's main commercial corridors, so it is one of the best locations

Figure 19. Housing Market Overview

Housing Unit Type	Total Units	Average Sales Price/ Rent (2019)	Average Home Value/ Rent PSF (2019)	Average Sales Price/ Rent (2020)	Average Home Value/ Rent PSF (2020)	Known Pipeline Units (2020)
Single-Family	22,703	\$395,000	\$176.00	\$420,341	\$180.96	630
Townhouse	5,360	\$293,250	\$201.00	\$287,550	\$190.47	883
Condominium	1,931	\$220,000	\$154.00	\$224,725	\$164.62	128
Multifamily	1,840	\$1,831	\$1.92	\$1,817	\$1.90	1,825

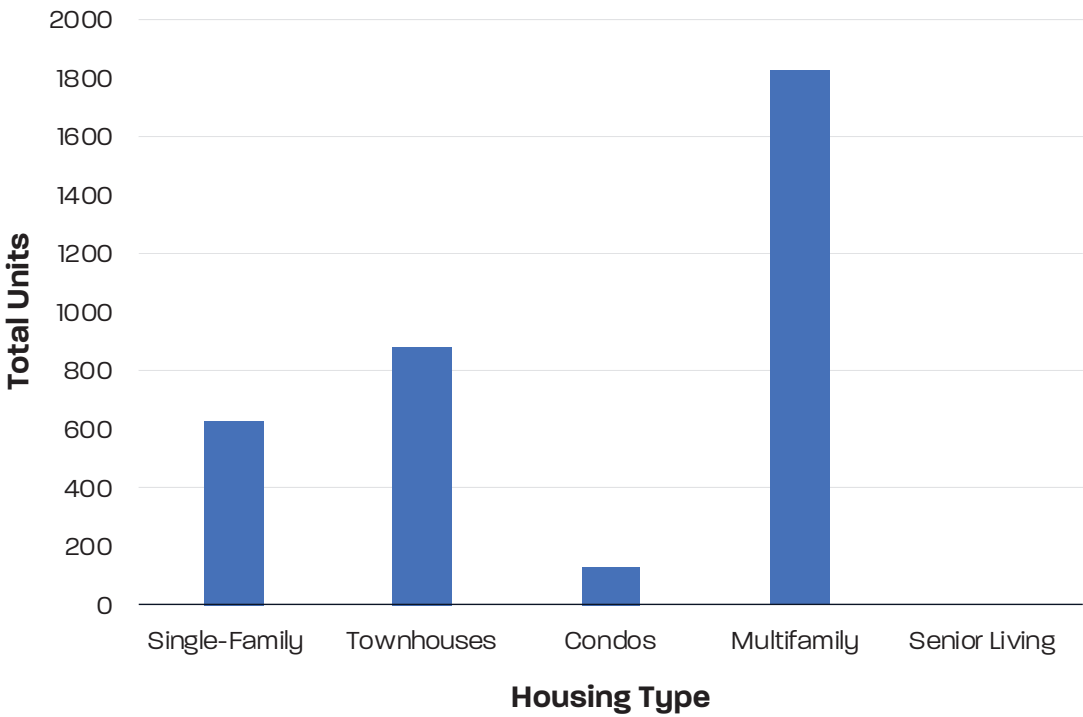
Source: MetroStudy, Redfin, CoStar.

Figure 20. Total Projected Household Growth by Age in Bowie (2019–2024)



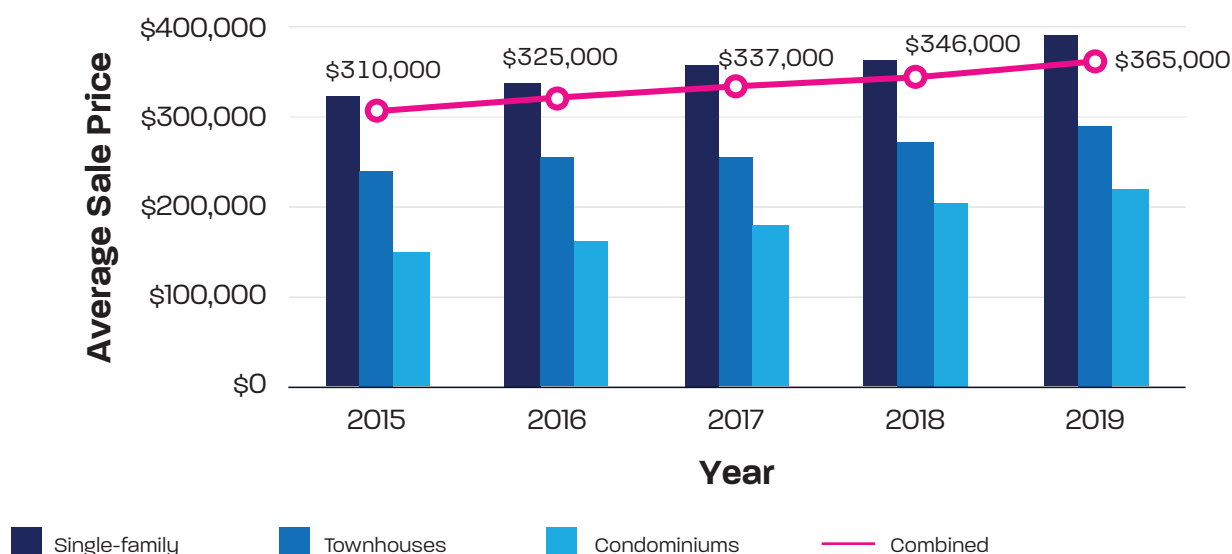
Source: MetroStudy, Redfin, CoStar.

Figure 21. Residential Pipeline in Bowie-Mitchellville and Vicinity Master Plan Area by Unit Type (2019)



Source: Neustar, 2019.

Figure 22. Average Sales Price by For-Sale Type (2015–2019)



Source: MetroStudy, Redfin, CoStar.

for low-density, detached housing in the master plan area. As seen in Map 19. New Construction Permits (2012–2019) there has been a small cluster of recently constructed single-family homes east of US 301, including Mill Branch Estates, a luxury community of 38 single-family detached homes that began construction in 2014. The Mill Branch subdivision is in a Residential Agriculture Zone, which permits suburban residential development on two-acre lots. Continued greenfield development in this area east of US 301, particularly in the Rural and Agricultural area (R&A area), where development must occur on well and septic, will increase pressure on Bowie's land for preservation. While the town cannot prevent development from occurring that aligns with permitted zoning, efforts should be made to encourage developers of low-density housing to pursue available land south of the R&A area, such as around Westphalia and Rosaryville, to reduce pressure on R&A area land and to fill in existing development capacity in established communities.

The two major master-planned developments for the master plan area will both bring added development pressures, so the City of Bowie should be prepared to encourage infill development in established communities along the master plan area's primary corridors and nodes in order to avoid development pressure from Melford or South Lake from seeping east of US 301 into R&A areas.

HOUSING DEMAND

The Bowie-Mitchellville and Vicinity master plan area is projected to grow by a net gain of 362 households by 2024, with almost all of this growth stemming from increases in households aged 65 and older. While residents aged 55 to 64 grew at a CAGR of 3.4 percent from 2010 to 2019, this trend is projected to reverse, with residents aged 55–64 declining by a CAGR of -0.5 percent, resulting in a loss of 269 households from 2019 to 2024. During this same time period, the master plan area is also projected to experience a large decrease in households ages 45 and 54, with over 1,000 households projected to leave the master plan area over the next five years. The County and City can look into developing and deploying surveys to understand why residents are choosing to leave the area—potential push factors could include lack of affordability and lack of diverse housing options, while residents could be pulled into other areas by factors such as transit, school quality, and availability of amenities. Developing an understanding of why households are leaving Bowie can help planning staff encourage future development to help retain residents.

The majority of the master plan area's known residential pipeline is composed of market-rate multifamily units, as shown in Figure 21. There is a total of 1,825 market-rate units planned to be delivered as part of the Melford Town Center and South Lake master-planned development projects. The overall

Figure 23. Townhouse Market Performance Overview (2015–2019)

Year	Median Sales Price	Median SF	Median Price PSF
2015	\$240,750	1,452	\$164.00
2016	\$257,000	1,468	\$172.00
2017	\$257,000	1,472	\$179.00
2018	\$274,500	1,440	\$192.00
2019	\$293,250	1,512	\$201.00

Source: MetroStudy, 2020.

increase in total housing units based on the known pipeline is much larger than projected household gain over the next five years. Melford and South Lake will need to attract residents from outside of the master plan area for success, as their size and scale outstrip projected demand.

The Tribute at Melford, a 140-unit senior apartment building located at Melford Town Center, recently opened in November 2019 and currently has a vacancy rate of 28.6 percent. Given that the project is still in the process of leasing up, this vacancy rate is not a reason for alarm. It is typical within the first year of a building's opening for vacancy to initially be high as leasing activity ramps up.

Currently, there are no other known senior multifamily projects planned within the master plan area. With the master plan area projected to add 1,745 households aged 65 and older over the next five years (the driving force behind the area's total projected net gain of 362 households), there is a potential gap in meeting the specific housing needs of these aging residents. The known residential pipeline is heavily weighted toward market-rate apartment units, which may not meet the demand from aging residents looking for units specifically geared to their needs, such as single-story floor plans and handicap-accessible bathrooms. In terms of detached single-family homes, much of the pipeline product is located in subdivisions of large homes that are 2,000 square feet and up in size, which suggests another potential gap in housing supply and demand. The master plan area is projected to lose a significant amount of households that likely have children and may need larger homes, while there will be increases in young professionals and seniors, cohorts who are likely to prefer smaller-footprint housing options, which could lead to an oversupply of these newly constructed large single-family homes. New residential development should be focused on options catered towards young professional

and seniors, who frequently seek and prefer highly amenitized offerings in walkable communities. This preference for walkable product in a connected neighborhood is very much in alignment with Plan 2035's vision.

HOUSING MARKET BY PRODUCT TYPE

The master plan area's for-sale housing market has experienced steady growth over the last five years, with the average sales price for detached single-family homes, townhouses, and condominiums increasing on an annual basis.

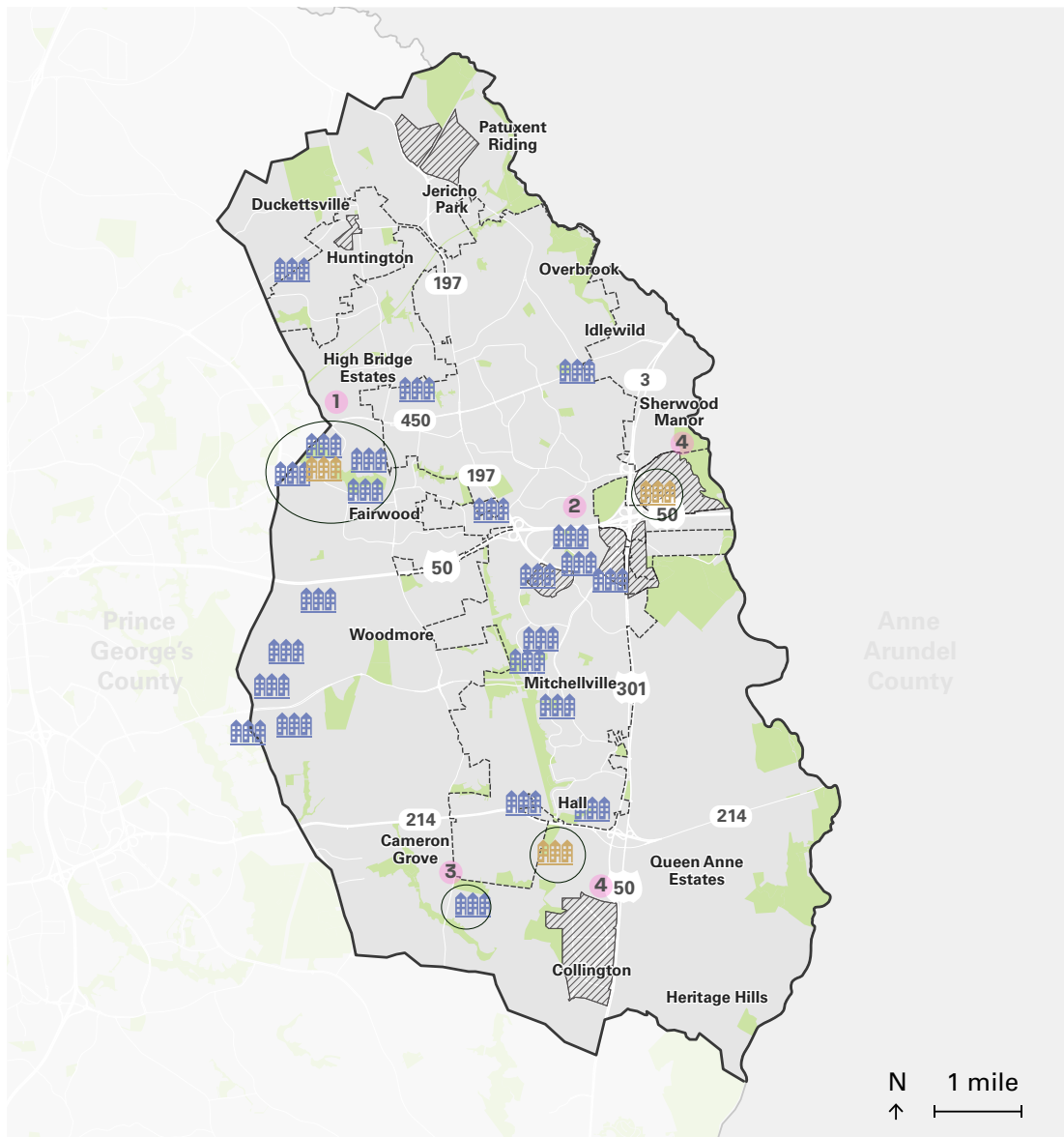
Townhouse Market

(See Map 20. Notable Townhouse Projects)

The Bowie-Mitchellville and Vicinity master plan area is home to a variety of townhouse communities, largely located west of the US 301 corridor, and there are currently over 800 planned townhouse units slated to be delivered by private developers. The median sales price for a townhouse has been increasing for the past five years.

- 1 Situated east of the intersection at MD 193 and MD 450 are five townhouse communities. These communities include the 75-unit The Choice at Fairwood completed in 2005, 157-unit The Retreat at Fairwood completed in 2006, 87-unit The Sanctuary at Fairwood completed in 2010, and 78-unit The Bounty at Fairwood completed in 2012. Mid-Atlantic Builders is currently developing 20 townhouse units off Fairwood Parkway. In 2020, townhouses within this cluster sold for an average price of \$390,000.
- 2 To the west of the intersection of MD 197 and US 301 lies another cluster of townhouse communities. Essington, located north of Collington Road, was developed in 1990 and consists of over 100 townhouses. Developed in 1997, Covington is a residential community located east of Mitchellville Road that consists of over 200 single-family dwelling units in addition to over 400 townhouses. Evergreen Estates is located directly south of the Bowie Town Center shopping center and delivered approximately 200 townhouse units in 1990. In 2020, townhouses within this cluster sold for an average price of \$302,000.
- 3 Oak Creek Club is a private residential community that includes single-family homes in addition to approximately 200 townhouses. Located east of Church Road just south of MD 214, townhouses in this community sold for an average price of \$411,000 in 2020.

Map 20. Notable Townhouse Projects



Notable Townhouse Projects



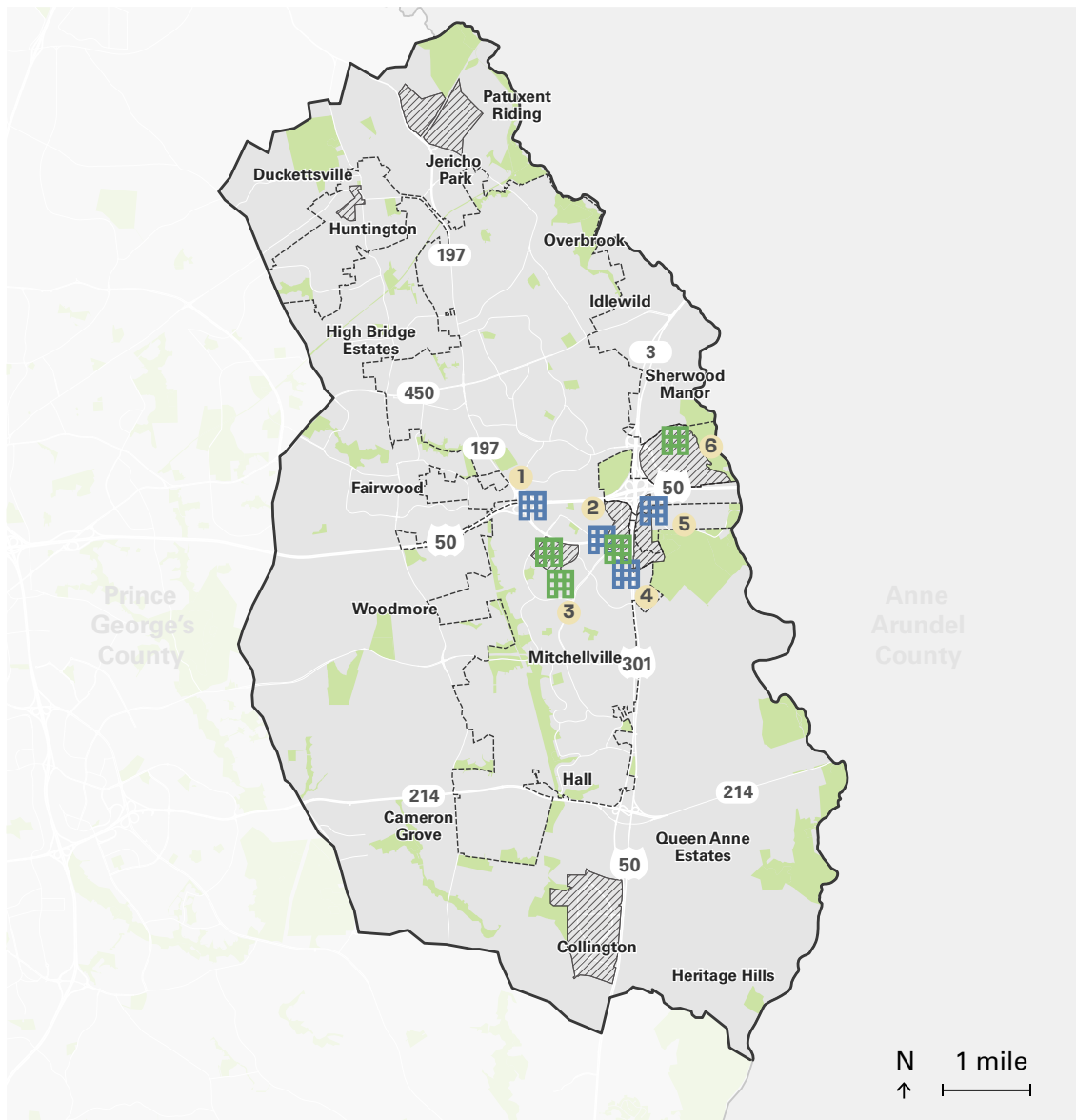
Source: Redfin.

Note: Numbers in map refer to text descriptions.

4 There are two master-planned development projects in the master plan area's pipeline that are anticipated to deliver over 800 townhouse units. Melford Town Center, a proposed 466-acre mixed-use, master-planned town center located at the intersection of US 50 and US 301,

is anticipated to deliver 300 townhouses if developed. At the intersection of Central Avenue and Crain Highway, South Lake is a proposed 381-acre mixed-use, master-planned project that is expected to deliver over 500 townhouse units if developed.

Map 21. Notable Multifamily Projects



Notable Multifamily Projects



Market-Rate Apartments



Senior-Living Apartments



Focus Area



City of Bowie

Source: CoStar.

Note: Numbers in map refer to photos in Figure 24. Multifamily Market Notable Projects.

Multifamily Market

There are only eight apartment buildings within the Bowie-Mitchellville and Vicinity master plan area, and half are age-restricted senior apartment projects. All eight communities comprise a total of approximately 2,000 multifamily units.

Residential Market Pipeline

The Bowie-Mitchellville and Vicinity master plan area's development pipeline includes over 600 detached single-family homes, 800 townhouses, 100 condominiums, and 1,800 multifamily units. The majority of the master plan area's pipeline units are from the proposed Melford Town Center and South Lake master-planned development projects.

Figure 24. Multifamily Market Notable Projects

1 The Bowen



Type: Market-Rate
Size (Units): 286

Rent PSF: \$2.03
Year Built: 2014

4 Heather Ridge



Type: Market-Rate
Size (Units): 324

Rent PSF: \$2.08
Year Built: 1987

2 The Willows



Type: Market-Rate
Size (Units): 79

Rent PSF: \$1.78
Year Built: 2004

5 Governors Green



Type: Market-Rate
Size (Units): 348

Rent PSF: \$1.78
Year Built: 1999

3 Alvista Bowie



Type: Market-Rate
Size (Units): 478

Rent PSF: \$1.89
Year Built: 1998

6 Tribute at Melford

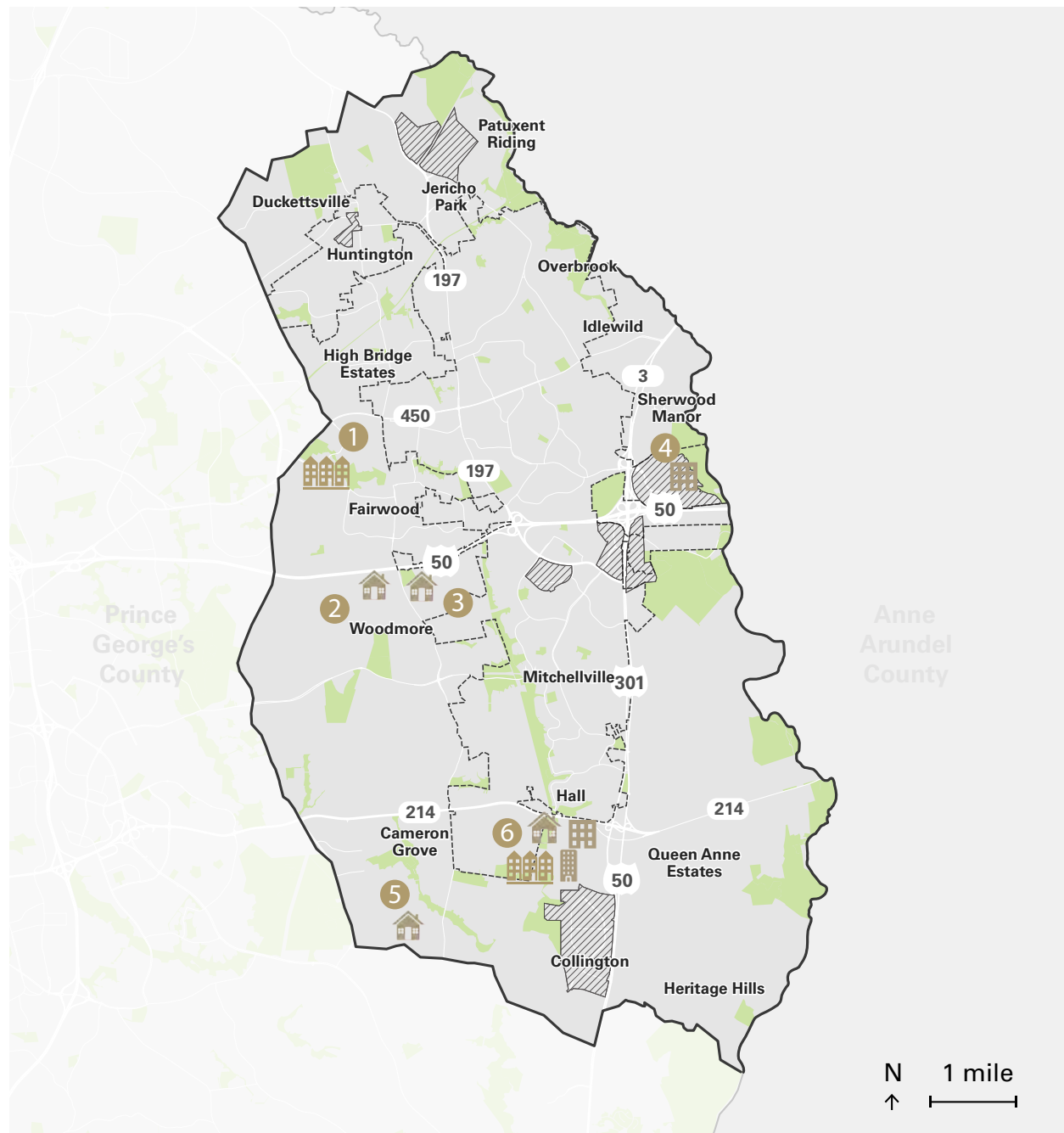


Type: Market-Rate
Size (Units): 140

Rent PSF: \$N/A
Year Built: 2019

Source: CoStar.

Map 22. Bowie-Mitchellville and Vicinity Master Plan Area Pipeline



Development Pipeline



Planned Single-Family



Planned Multifamily



Focus Area



Planned Townhouses



Planned Condominiums



City of Bowie

Source: CoStar.

Note: Numbers in map refer to photos in Figure 25. Development Pipeline.

Figure 25. Development Pipeline

1 Fairwood



Developer: Mid-Atlantic
Type: Market-Rate
Size (Units): 286

Rent PSF: \$2.03
Year Built: 2014

4 Melford Town Center



Developer: St. John Prop.
Type: Market-Rate
Size (Units): 286

Rent PSF: \$2.03
Year Built: 2014

2 King's Isle Estates



Developer: Caruso Homes
Type: Market-Rate
Size (Units): 286

Rent PSF: \$2.03
Year Built: 2014

5 Oak Creek



Developer: Ryan Homes
Type: Market-Rate
Size (Units): 286

Rent PSF: \$2.03
Year Built: 2014

3 Collingbrook Estates



Developer: Caruso Homes
Type: Market-Rate
Size (Units): 286

Rent PSF: \$2.03
Year Built: 2014

6 South Lake



Developer: NAT Michael
Type: Market-Rate
Size (Units): 286

Rent PSF: \$2.03
Year Built: 2014

Source: CoStar, Redfin; M-NCPPC.

Market Performance

Both market-rate and senior-living multifamily products are relatively stable, though there has been very little recent development activity—the overall market in the master plan area has seen only two projects completed in the past decade, with a single market-rate project and a single senior project. The stock of market-rate product is expected to grow substantially over the next 10 years, with over 1,800 apartment units slated to deliver at the Melford Town Center and South Lake master-planned development projects. With the majority of household growth slated to stem from increases in senior households aged 65 and older, there is an opportunity for future multifamily development to market itself to this growing demographic.

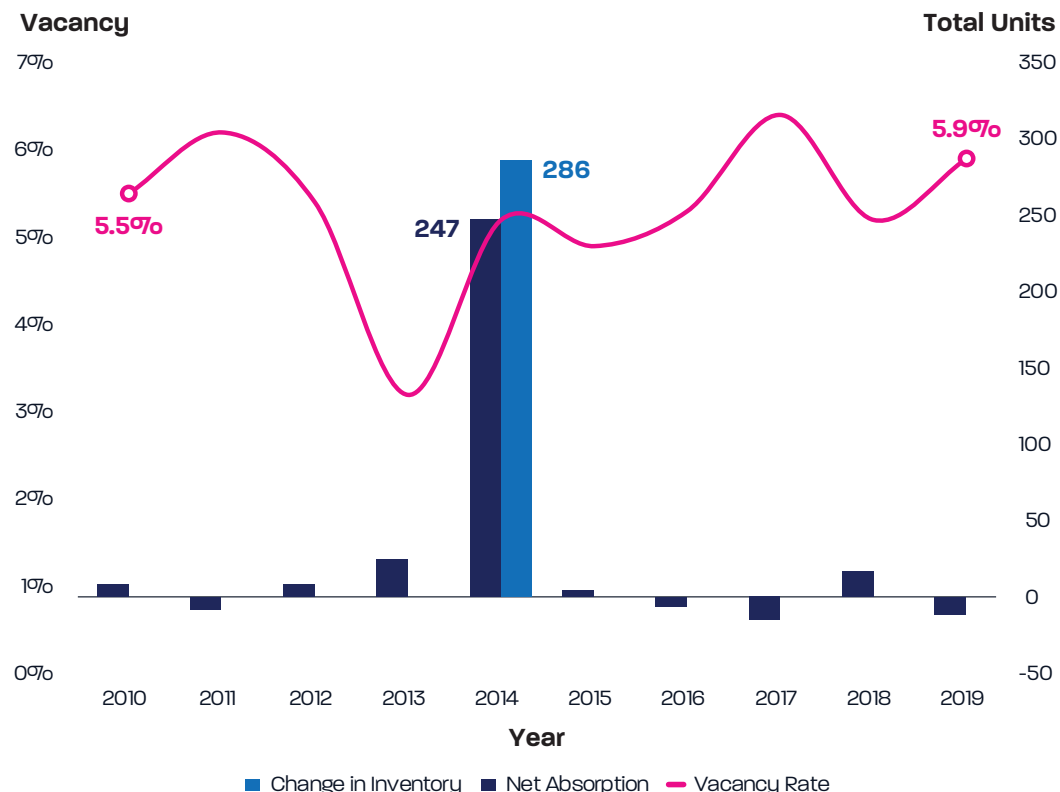
MARKET-RATE PERFORMANCE

The master plan area has seen just one recent market-rate multifamily delivery, and vacancy has remained largely unchanged despite this lack of new supply, reflective of zoning constraints and potentially limited demand.

While the 286-unit Bowen apartment complex was absorbed well after delivery in 2014, the master

plan area's lack of any more recent multifamily projects reflects both zoning constraints and historic preferences for single-family homes. Under the County's previous zoning code, the development of new market-rate multifamily near existing shopping centers required zoning map or text amendments for shopping centers located in C-S-C (Commercial Shopping Center) or C-M (Commercial Miscellaneous) zones. The County's 2018 Zoning Ordinance provides more flexibility in zoning to help support new multifamily development near large commercial centers, in order to better align Plan 2035's vision for creating walkable, mixed-use communities. In addition to this zoning change that may help facilitate more multifamily projects, the Melford Town Center and South Lake master-planned development projects are poised to add significant new multifamily product, which will greatly increase the area's supply and test demand for new apartments, condos, and townhouses. Since the Melford Town Center and South Lake master-planned projects are located 6 miles and 10 miles south of the Bowie State/MARC Station campus node, respectively, there is an opportunity for new multifamily units closer to Bowie State University to meet potential unmet demand from students, faculty, and staff, as well as MARC commuters.

Figure 26. Market-Rate Multifamily Absorption, Deliveries, and Vacancy (2010–2019)



Source: CoStar.

SENIOR-LIVING PERFORMANCE

Senior-living multifamily units are apartment units restricted to renters who are aged 55 and older. These apartment units can be designed as either independent living or assisted care communities and offer a variety of amenities such as recreational programs, transportation, and meal services. Demand for senior-living multifamily has experienced minimal fluctuations over the last 10 years, with vacancy for both 2010 and 2019 at a low of 2.1 percent. Considering that the majority of the master plan area's population growth from 2010–2019 stemmed from increases in residents aged 55 and older, and that projected future growth is anticipated to be concentrated amongst residents aged 65 and older, combined with the overall strength and stability of the senior-living multifamily market, there is likely a strong opportunity for future senior-living multifamily development in Bowie. In particular, given the relative wealth of Bowie's residents, many of whom currently live in large single-family homes, there is an opportunity to deliver higher-end senior-living communities with a suite of amenities marketed to senior residents who are looking to downsize and would be willing to pay a premium for a high-end multifamily product.

HOUSING COST BURDEN

Housing cost burden is defined as households that pay more than 30 percent of their income on housing. In the Bowie-Mitchellville and Vicinity master plan area, residents earning less than \$20,000 annually are the most cost-burdened.

Extreme housing cost burden amongst the master plan area's lowest income rental households indicates an opportunity for new mixed-income multifamily development to meet this demand. A future study would be needed to see if mixed-income development would be financially feasible in Bowie, including an analysis of market-rate rents to see if they are high enough to cross-subsidize affordable units.

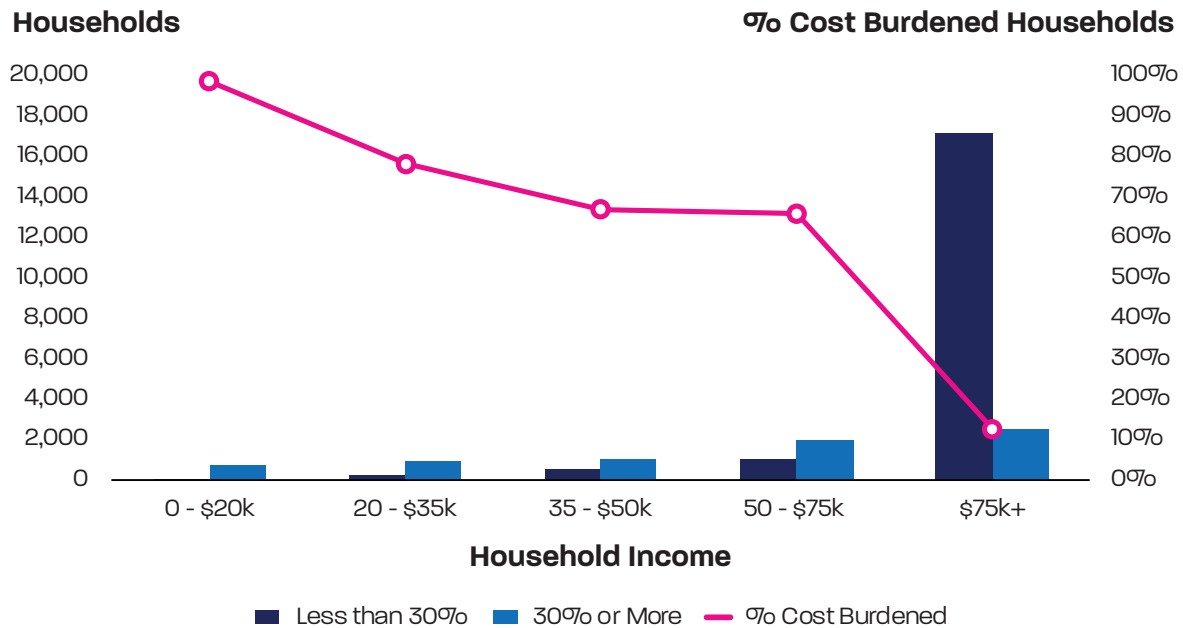
Map 23. Housing Cost Burden and Income in Bowie-Mitchellville and Vicinity illustrates the census block groups within the master plan area where residents experience relatively greater challenges with income and housing costs as a percentage of total monthly income. Most census block groups where median income is lower than the master plan's overall median income fall within the City of Bowie (shaded in a darker gray on the map).

Figure 27. Senior-Living Multifamily Absorption, Deliveries, and Vacancy (2010–2019)



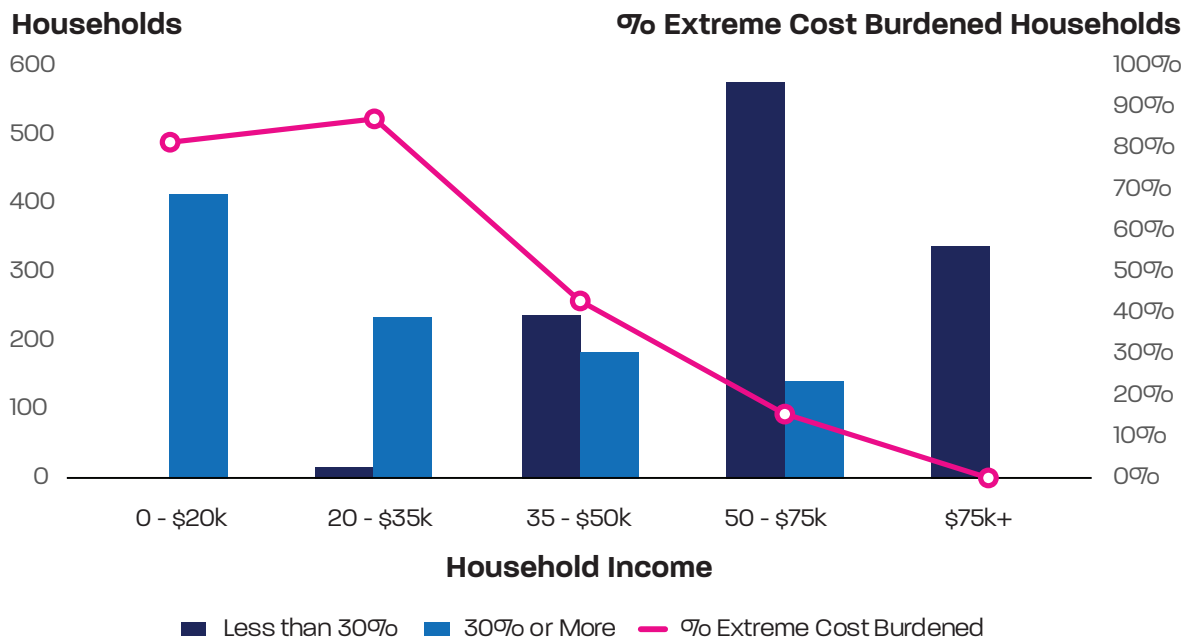
Source: CoStar.

Figure 28. Owner-Occupied Housing Cost Burden (2018)



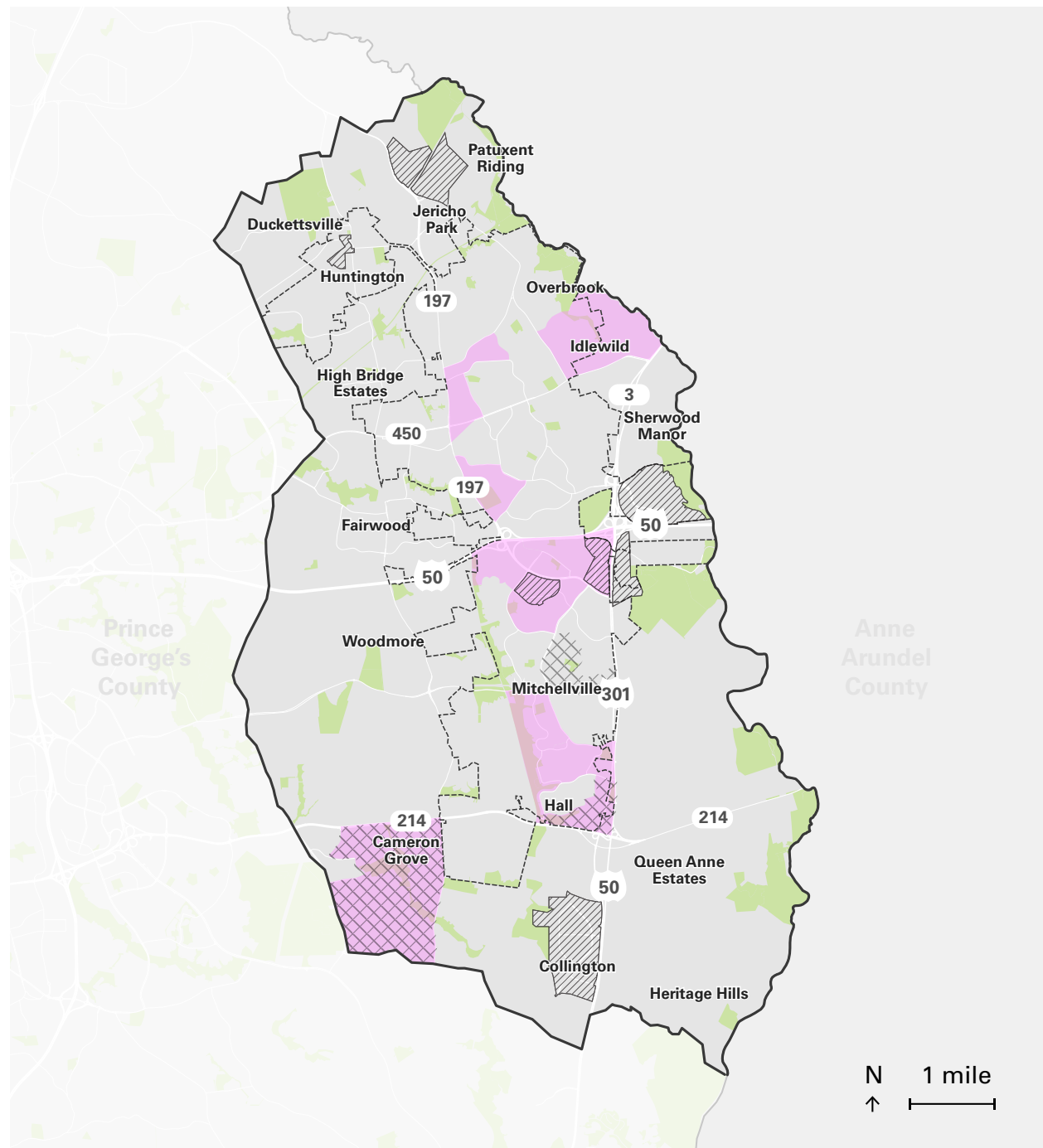
Source: American Community Survey Tables: 2014–2018 (5-Year Estimates).

Figure 29. Renter-Occupied Housing Cost Burden (2018)



Source: American Community Survey Tables: 2014–2018 (5-Year Estimates).

Map 23. Housing Cost Burden and Income in Bowie-Mitchellville and Vicinity (2014–2018)



- | | |
|---|---|
| Block group below the master plan area median household income AND majority pays over 30% of of household income on rent | City of Bowie |
| Block group below County median household income (\$83,034) | Focus Area |

Source: American Community Survey Tables: 2014–2018 (5-Year Estimates).

While household incomes tend to be higher in the master plan area than in Prince George's County overall, there are three census block groups in the master plan area whose median household income falls below the County median. This includes the areas of Ternberry, Pin Oak Village, Yorktown, and Oaktree, as well as the census block group containing Cameron Grove, the master plan area's largest retirement community. Housing burden, as measured as a percentage of monthly income tends to be greater City of Bowie, east of the MD 197 corridor and west of US 301.

This analysis uses ACS data about monthly housing costs and household income, by census block group. First, census block groups where median household income is lower than the master plan area median (by block group) were identified. Then, block groups were identified where housing cost burden is relatively high for owners and renters, respectively.

Owner housing cost burden is calculated using American Community Survey data—specifically, percentage of median monthly owner costs as a percentage of household income—which computes the ratio of selected monthly owner costs to monthly household income for a block group overall. While individual homeowners throughout Bowie-Mitchellville and Vicinity may experience housing cost burden, there are no block groups in the master plan area in which over 50 percent of all homeowners experience housing burden.¹

There are, on the other hand, parts of Bowie-Mitchellville and Vicinity where the majority of renters experience housing burden, based on the ACS variable of gross rent as a percentage of household income. Census block groups where gross rent exceeds 30 percent of household income serves as a marker for renter housing cost burden.² There are eight census block groups in the master plan area where the majority of renters experience housing cost burden. Most of these block groups fall within the City of Bowie.

Housing Affordability Programs

There are various programs in Prince George's County targeted to both developers and residents in order to increase opportunities for affordable homeownership in Bowie.

- **Housing Choice Voucher Program (HCVP):**

The Housing Choice Voucher Program is a tenant-based voucher program that provides tenants the opportunity to live where they choose. The Rental Assistance Division (RAD) pays the owner the difference between 30 percent of adjusted family income and a PHA-determined payment standard or the gross rent for the unit, whichever is lower. The family may choose a unit with a higher rent than the payment standard and pay the owner the difference not to exceed 40 percent of adjusted family income. All rents are subject to a comparability study of similar unassisted properties in the immediate area. Visit www.HUD.gov to learn more about the HCVP.

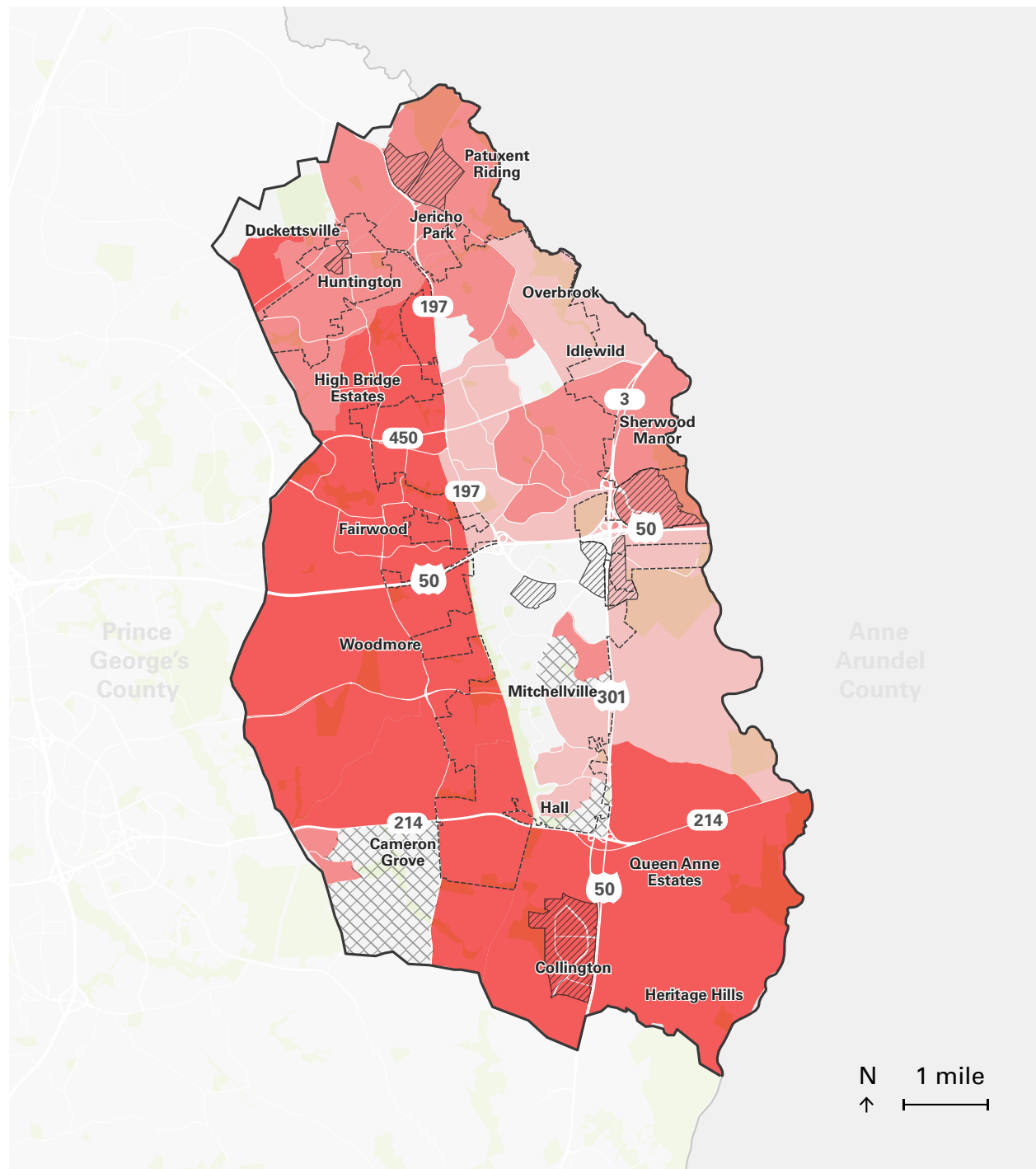
- **Housing Choice Voucher Homeownership Program (HCVHP):** The Housing Choice Voucher Homeownership Program uses a voucher subsidy that once helped families pay rent to a landlord to now be used to help first-time homeowners purchase their own home. Eligibility requires families be a participant of the HCVP in good standing, be a first-time home buyer not having owned a home during the last three years, have a good rental payment history, have a consistent employment history during the last two years, have a minimum annual income of \$30,000, and have a minimum credit score of 620. There is no employment or income requirements for the disabled or elderly population. Visit www.HUD.gov to learn more about the HCVHP.

- **Moderate Rehabilitation Program (Mod Rehab):** The Moderate Rehabilitation Program provides project-based rental assistance for low-income families as a component of a housing agency's (HA) HCVP. The HA can attach up to 20 percent of its voucher assistance to specific housing units if the owner of the multifamily housing agrees to either rehabilitate or construct the units, or if the owner agrees to set aside a portion of the units in an existing development in exchange for low interest loans. The subsidy stays with the property and will not transfer with the family should they decide to move to other

¹ More information about ACS housing cost burden data for owners can be found at: <https://www.socialexplorer.com/data/ACS2015/metadata/?ds=ACS15&table=B25095>.

² More information about ACS housing cost data for renters can be found at: https://www.socialexplorer.com/data/ACS2016_5yr/metadata/?ds=ACS16_5yr&table=B25070.

Map 24. Median Household Income by Census Block Group (2018)



Median Household Income



Source: American Community Survey Tables: 2014–2018 (5-Year Estimates).

housing. Visit [HUD.gov](https://www.hud.gov) to learn more about the Moderate Rehabilitation Program.

- **Pathway to Purchase Program:** The Pathway to Purchase Program allows first-time home buyers to be eligible for up to \$10,000 in down payment and closing costs toward the purchase of their first home. The program consists of a 0 percent interest, deferred payment loan that is forgiven after 10 years. The purchaser must pay back the loan in full when the home is sold, transferred, or ceases to be the primary residence of the buyer within the 10-year affordability period. Visit www.princegeorgescountymd.gov to learn more about the Pathway to Purchase Program.
- **Prince George's County Purchase Assistance Program (PGCPAP):** The PGCPAP provides home purchase assistance to eligible first-time home buyers to purchase housing in Prince George's County. Home purchase assistance includes down payment, mortgage principal reduction, and closing costs. The program is funded by the Housing Investment Trust Fund. The Redevelopment Authority of Prince George's County administered PGCPAP in partnership with participating lenders, realtors, and housing counseling agencies that are approved by HUD. Visit www.princegeorgescountymd.gov to learn more about the Purchase Assistance Program

Affordable Housing in Bowie

Bowie is overwhelmingly comprised of households with high median incomes, with most households within Bowie making over \$100,000 annually. Bowie Local Town Center, where the median household income is around \$53,000, is the only node within the master plan area to fall below the County's median household income of \$83,034. The master plan area is home to six federally subsidized properties, as seen in Figure 15. One of these properties includes an affordable senior care facility, and two offer project-based rental assistance for people with disabilities.

The remaining three subsidized housing developments are located in Bowie Local Town Center. The first, Pin Oak Village Apartments, is a 220-unit senior housing community that was partially funded through the HOME Investment Partnerships Program. In projects with 5 or more HOME-assisted units, at least 20 percent of these units must be occupied by families earning 50 percent or less of area median income (AMI) with all other HOME-assisted units occupied by families earning 80 percent or less of AMI. The second, Bowie Commons, is a 36-unit Section 8 Project-Based Rental Assistance

property for qualified elderly or disabled residents. Section 8 Project-Based Rental Assistance tenants make a monthly contribution toward rent equal to 30 percent of their adjusted income. The third, Bowie VOA Living Center, is a low-income apartment building for residents with disabilities. The government gives funds directly to apartment owners, such as the Bowie VOA Living Center, who in turn lower apartment rents for low-income tenants.

Considering the overall wealth of Bowie's existing population, it is unlikely that the development of a 100 percent affordable housing community is necessary to relieve the housing cost burden felt by the master plan area's most financially vulnerable residents. Instead, Bowie should work with Prince George's County as well as with private developers and mortgage lenders to ensure that existing affordable housing programs are promoted and marketed to low-income families, so that residents are linked to resources to afford existing housing stock and are offered opportunities to access affordable home ownership. The preservation and maintenance of naturally occurring affordable housing units will be critical to ensure that all Bowie residents have access to units affordable at their income level.

Finally, the County and city can push for new market-rate multifamily developments to set aside a portion of units as affordable units, as well as explore other incentives and avenues for creating mixed-income, multifamily development within the master plan area.

Discussion of Challenges and Opportunities

CONCENTRATING MIXED-USE DEVELOPMENT IN KEY CORRIDORS AND NODES

Concentrating new housing development within existing nodes and corridors will help create walkable, mixed-use communities within the master plan area, while also addressing a variety of challenges and opportunities outlined in Plan 2035. Creating mixed-use communities will bring a range of benefits to Bowie's residents, including: less air pollution and a reduction in traffic on roadways due to decreased car usage, preservation of the County's existing agricultural resources by concentrating development near existing commercial centers, and improved connectivity and mobility between neighborhoods by focusing on pedestrian-friendly design. These

are all features of the types of walkable, mixed-use communities that young professionals and seniors alike are seeking across the country.

Developing both market-rate and senior multifamily units within existing nodes and corridors will help create walkable mixed-use neighborhoods while providing residential product that aligns with the housing preferences of Bowie's growing senior and young professional cohorts. Plan 2035 highlights how too many centers can undermine economic growth, instead favoring new residential development that is concentrated in a limited number of centers to achieve density that supports walkable mixed-use neighborhoods. An excess of local or regional centers can create stress on the County's existing infrastructure, leading to further traffic congestion and roadway expansions in order to accommodate new housing developments, as is the case along Church Road. Focusing residential development within the BSU/ MARC Station Campus Center, Old Town Bowie, and Bowie Local Town Center focus areas helps combat this challenge by concentrating new multifamily product near existing transit, retail, and employment centers.

INCREASING RESIDENTIAL DENSITY TO ATTRACT ADDITIONAL COMMERCIAL TENANTS

Increasing residential density will help Bowie build a foundation to support additional commercial tenants, helping generate economic growth and increasing Bowie's regional competitiveness as a location for residents and employers. Residential density is critical to attracting a variety of office and retail tenants, with many commercial tenants using population density thresholds to determine suitable locations for new stores. For grocery specifically, the County's 2016 *Retail Marketability and Competitiveness Study* found that national grocery chains typically look for population densities of 50,000–100,000 people within a three-mile radius, or population density of 150,000–200,000 within a five-mile radius, when selecting prospective store locations.³ Bowie's existing low-density residential neighborhoods can therefore act as a deterrent in terms of attracting new employers and retailers. Further, many commercial tenants today are driven to make locational decisions based on the preferences of young professionals and seniors, two demographics who are driving demand in cities across the country, and who are increasingly flocking to walkable urban communities.

To stabilize its key corridors and nodes as well as attract additional commercial tenants to the area, Bowie will

therefore need to expand its residential base. This growth should be accommodated by adding residential density through the development of townhouses as well as market-rate and senior multifamily housing, as opposed to greenfield development of detached single-family homes. Offering a diversity of housing stock options with an emphasis on increased density will help address existing gaps in Bowie's neighborhoods and will begin to enhance walkability. With major mixed-use developments already planned along the US 301 corridor, there is potential to leverage this momentum for additional residential development within the following nodes:

- **Bowie State University/MARC Station Campus**

Center: Due to a lack of housing options near the Bowie Campus Center, there is potentially an opportunity to build low- to mid-rise market-rate and student apartment units to provide students with off-campus housing options adjacent to campus. Considering BSU's plans to develop additional on-campus dorm rooms, further engagement with students and faculty will be required to understand the depth of demand for off-campus housing, as well as the market segmentation and potential capture of likely tenants, e.g., graduate students, faculty, and students with families. New multifamily development would add density to the campus center and decrease the need for students to commute from further neighborhoods where multifamily options are more readily available. New multifamily positioned near the MARC station could also be marketed to young professionals who work in Baltimore or Washington, D.C., providing them a one-seat ride to these major employment centers. New housing development within the Bowie State University Campus Center aligns with the vision outlined in Plan 2035.

- **Old Town Bowie:** Old Town Bowie is mostly comprised of aging housing stock, with many housing units within the node built before 1959. There is potential for Old Town Bowie's aging housing stock to be repurposed into new residential options designed for seniors, given the lack of pipeline projects targeted specifically to the needs of this demographic. In addition to repurposing existing stock, there could be an opportunity to increase density by adding new townhouses. Townhouses, compared to single-family homes, are relatively affordable, offer a smaller footprint, and could be targeted toward seniors who are looking to downsize from a detached single-family home in

3 "Prince George's County Retail Marketability and Competitiveness Study." 2016. Prepared for MNCPPC by RCLCO.



Source: M-NOPPC.

A house in the Red Willow neighborhood (top); the Belair neighborhood (bottom).

a low-density neighborhood. This redevelopment of Old Town Bowie's aging housing units, as well as the potential development of new senior townhouses, could help attract new retail tenants. However, in order to increase density within Old Town Bowie, the approval of the node's existing residents will be critical for new development to take place.

- **Bowie Local Town Center:** With Melford Town Center expecting to deliver 1,500 multifamily units and 300 townhouses, it is best to hold off on increasing market-rate residential development within the Bowie Local Town Center in the foreseeable future to allow the market to absorb this large increase in residential product. However, there may be an opportunity to build townhouses and low-rise multifamily in proximity to Melford in the future that is focused on affordability and creating a mixed-income community to bolster the diversity of residents living within the larger Melford node.





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WINDING CHERRY
COMMUNITY CENTER
1000 WINDING CHERRY
BOWIE, MD 20715
(301) 261-1234

Handicap
Accessible

Handicap
Accessible

FIRE LANE

Alvista in Bowie



Source: M-NCPPC.

Shops at Bowie Town Center.

2.3 Commercial Market Profile



The Bowie-Mitchellville and Vicinity master plan area is predominantly a residential community of low-density neighborhoods made up of single-family detached houses. The existing commercial market, primarily Class B/C office and strip center retail, is largely concentrated within Bowie Town Center, while industrial uses are concentrated within the Collington Trade Zone. An overview of the Master plan area's commercial market is provided in Figure 30. Commercial Market Overview.

This section considers the office, industrial, and retail markets in Bowie-Mitchellville and Vicinity, including existing supply and demand of each commercial use, an overview of current market conditions, and potential future opportunities. The clearest opportunities for supporting commercial market

growth and strengthening existing communities in Bowie-Mitchellville and Vicinity include redeveloping aging shopping centers, increasing infill development along key corridors, and planning for mixed-use development that concentrates residential, retail, and office in existing centers. Strengthening Bowie-Mitchellville and Vicinity's commercial market is a critical component of creating walkable, vibrant communities as envisioned by *Plan Prince George's 2035 Approved General Plan* (Plan 2035).

COVERED IN THIS SECTION:

- Commercial Market Overview
- Office Market
- Industrial Market
- Retail Market

Commercial Market Summary

OFFICE

With a high vacancy rate of 20.3 percent, and no recent private development activity, Bowie is not an active market for new Class A office space. The master plan area lacks the density, amenities, and transit access that many top employers demand when seeking tenancy in new Class A office space compared to other submarkets in the Washington metropolitan region, such as Bethesda, Silver Spring, Greenbelt, and other Metro station areas in Prince George's County. Additionally, Bowie's average Class A office rent of \$26.15 per square foot is not high enough to justify the construction costs of new Class A, which typically requires a rent threshold of \$30 per square foot based on the construction costs typical of the Washington metropolitan region. In terms of employment, the healthcare industry is responsible for a large portion of Bowie's employment growth over the past five years, particularly within sectors such as outpatient care centers, home health care services, mental health facilities, and family service centers. Since much of the office market in Bowie-Mitchellville and Vicinity serves local residents, the capacity for office market growth is tied to overall population growth.

INDUSTRIAL

In terms of its industrial market, Collington Trade Zone possesses several competitive advantages for attracting industry tenants in the region:

- Geographic location, which provides accessibility to Baltimore's ports in addition to ease of access to Washington, D.C.
- Large size, which encompasses over 1,000 acres.
- The designated foreign trade zone within its borders, which provides attractive tariff exemptions to tenants.

With over 4 million square feet of industrial space, the master plan area's industrial market has performed well over the past two years, with industrial vacancy coming in at just 3.1 percent in 2019. Recent industrial deliveries within the Collington Trade Zone have been the result of large corporate tenants supporting the development of new industrial warehouse space tailored to meet their specific needs. The recommended upgrade (F-10) of US 301 (Robert Crain Highway) into a limited-access freeway, in addition to the replacement of the Harry W. Nice Bridge that crosses the Potomac River to connect southern Maryland to Virginia, will help further enhance Bowie's regional connectivity and could assist in attracting additional industrial employment to the

Figure 30. Commercial Market Overview

Commercial Type	Total SF (2019)	Average Rent PSF (2019)	Vacancy (2019)
Office	1,802,000	\$23.29	10.4%
Class A Office	672,000	\$26.15	20.3%
Class B Office	943,000	\$20.15	5.4%
Class C Office	187,000	N/A	0.0%
Retail	3,753,000	\$30.43	6.4%
Industrial	4,198,000	\$7.31	3.1%

Source: CoStar.

master plan area, particularly within sectors such as transportation, logistics, and warehousing.

RETAIL

Bowie's retail market has performed with relative stability over the past 10 years, though the market experienced a recent uptick in vacancy due to the closure of several large national chains that had outlets in the Bowie area, including Sears, Dressbarn, and A.C. Moore. This loss in Bowie reflects national trends—A.C. Moore and Dressbarn shuttered all of their stores in 2019, while Sears filed for bankruptcy at the end of 2018 and dramatically reduced its number of stores. Most retail within the master plan area is concentrated along the MD 450 (Annapolis Road) corridor and in Bowie Local Town Center. MD 450 (Annapolis Road) provides easy access to a variety of residential communities along the corridor, and retail centers along MD 450 (Annapolis Road) anchored by grocery store tenants serve as hubs for surrounding neighborhoods. Bowie Local Town Center is home to a great concentration of retail and office space, and the node is the master plan area's core destination for retail shopping along the US 301 (Robert Crain Highway) regional corridor.

There is existing, unmet retail spending potential within the master plan area, meaning residents have to travel outside of the area to meet their shopping needs (see Figure 39. Existing Retail Gap by Industry Sector [2017]). However, Bowie-Mitchellville and Vicinity's lack of connectivity and transit access, and low-density communities, impede the attraction of new retailers to the area. Additionally, Bowie is in close proximity to other major regional retail centers, like the Annapolis Mall and the Waugh Chapel Towne Centre, both of which are within a 15-minute drive of Bowie Town Center.

Given that the existing residential base is served by these retail centers located outside of the master plan area, new retail development will not occur without an expansion of Bowie's residential base.

Recent Commercial Project Deliveries (2015–2019)

Recent commercial deliveries in the master plan area are suburban in character and have primarily been delivered along the MD 450 and US 301 corridors. Bowie Marketplace is the most prominent recent delivery along the MD 450 corridor, with the 135,000-square-foot marketplace replacing the old marketplace shopping center that, according to the 2016 *Prince George's County Retail Marketability and Competitiveness Study*, was considered an eyesore for many years. Bowie Marketplace follows the redevelopment of other aging shopping centers along the corridor, including the 264,000-square-foot Free State Shopping Center (renovated in 2006) and the 186,000-square-foot Hilltop Plaza (renovated in 2011). The delivery of Lidl in 2018 marks the fifth grocery store along MD 450, joining the Giant located at Free State Shopping Center, the Harris Teeter located at Bowie Marketplace, and the MOM's Organic Market and Aldi located at Hilltop Plaza.

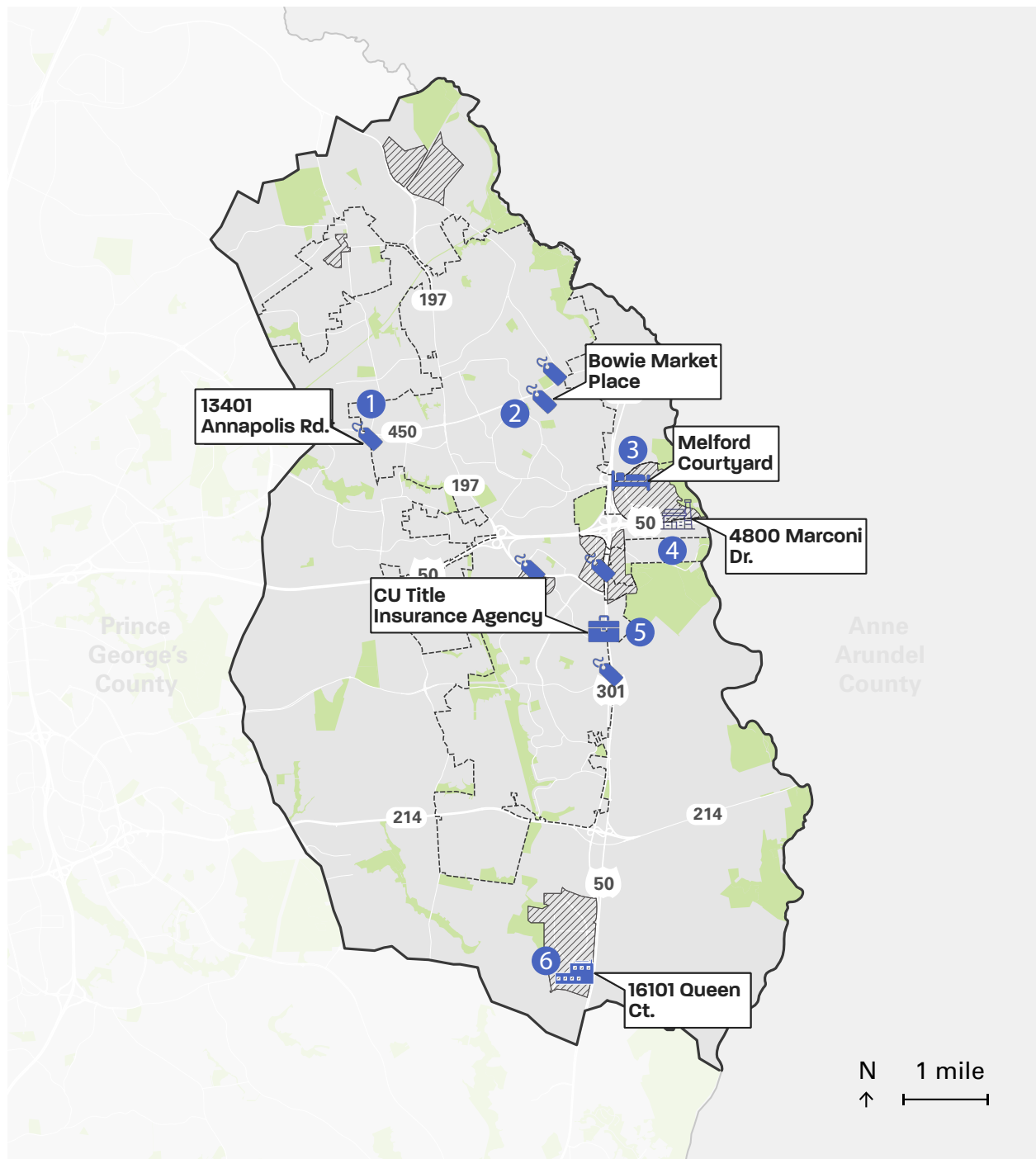
Recent commercial deliveries along the US 301 corridor have largely stemmed from phased pipeline projects within Bowie-Mitchellville and Vicinity's key focus areas. The 2019 delivery of the 144-key Courtyard by Marriott Bowie is the first of Melford Town Center's three planned hotels. Additionally, the 2016 delivery of La-Z-Boy's distribution center marked the second phased delivery within the Collington Park Project. The project's first phase in 2014 delivered the 175,000-square-foot FedEx Ground package sorting facility and two additional industrial buildings, totaling 115,000 square feet, are expected as part of the Collington Park Project's next phase. Other recent deliveries along US 301 consist of much smaller-scale office and retail infill projects.

Figure 31. Recent Commercial Deliveries (2015–2019)


Commercial Type	Primary Tenant	Total SF (2019)	Rent PSF (2019)	Year Built
Retail	Lidl	31,000	\$19.09	2018
Retail	Crafty Crab	2,000	\$20.44	2018
Retail	Bowie Marketplace	135,000	\$31.05	2016
Hotel	Melford Courtyard	144 keys	N/A	2019
Industrial	4800 Marconi Dr	103,000	\$7.41	2017
Retail	BJ's Restaurant and Brewhouse	8,000	\$21.23	2017
Retail	Taco Bell	2,000	\$22.39	2017
Office	CU Title Insurance Agency	15,000	\$24.01	2015
Retail	CVS	13,000	\$22.64	2015
Industrial	La-Z-Boy Distribution Center	221,000	\$7.31	2016

Source: CoStar.

Map 25. Notable Recent Commercial Developments



Notable Recent Developments

- | | | |
|---|---|---|
|  Recent Retail |  Recent Office |  Focus Area |
|  Recent Hotel |  Recent Industrial |  City of Bowie |

Source: CoStar

Figure 32. Notable Recent Commercial Developments

1 13401 ANNAPOLIS ROAD



Type: Retail
Size (SF): 31,000

Key Tenant: Lidl
Year Delivered: 2018

4 4800 MARCONI DRIVE



Type: Industrial
Size (SF): 103,000

Building Class: B
Year Delivered: 2017

2 BOWIE MARKETPLACE



Type: Retail
Size (SF): 135,000

Key Tenant: Harris Teeter
Year Delivered: 2016

5 CU TITLE INSURANCE AGENCY



Type: Office
Size (SF): 15,000

Building Class: B
Year Delivered: 2015

3 MELFORD COURTYARD



Type: Hotel
Size (Units): 144

Key Tenant: Marriott
Year Delivered: 2019

6 16101 QUEEN COURT



Type: Industrial
Size (SF): 221,000

Building Class: B
Year Delivered: 2016

Source: CoStar.

Pipeline Commercial Projects

Most of the planned commercial development in the master plan area is expected to deliver as part of the Melford Town Center, Mill Branch Crossing, and South Lake master-planned development projects, all of which are located along the US 301 corridor. The total known commercial pipeline is comprised of approximately 911,000 square feet of office, 887,000 square feet of retail, 1,000 hotel rooms, and 115,000 square feet of industrial space.

St. John Properties is currently developing Melford Town Center, a 466-acre mixed-use community located at the intersection of US 50 (John Hanson Highway) and US 301. The 144-key Melford Courtyard by Marriott, the first of three planned hotels, and the 140-unit Tribute at Melford senior living apartment building, which opened in 2019. When completed, Melford Town Center will also include 1,500 multifamily units, 300 townhouses, 260,000 square feet of office space, 85,000 square feet of

Map 26. Notable Pipeline Projects



Notable Pipeline Projects



Source: CoStar.

retail, and two additional hotels. The Prince George's County Planning Board approved the 435-unit Mansions at Melford Town Center multifamily project, and The Aspen, a 388-unit multifamily building, is currently in its final phase of entitlements. The 300-unit townhouse component of the project is currently in its preliminary entitlement stage.

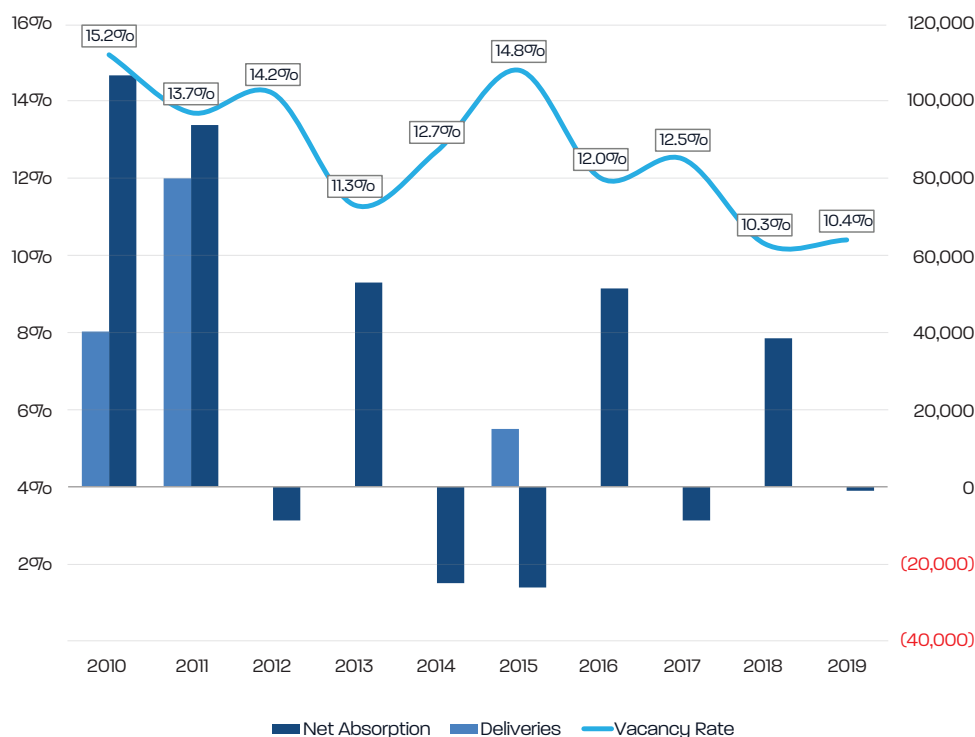
After unsuccessfully marketing the former 130,000-square-foot Sears building within Bowie Town Center to potential tenants, Seritage Growth Properties is now proposing to redevelop the 10.8-acre site for future mixed-use. The Sears redevelopment is planned to include 800 apartment units, 80,000 square feet of office, 75,000 square feet of retail, and a 155-key hotel. The owners have requested a change to their zoning basic plan to allow for construction of the proposed development program.

Mill Branch Crossing is a proposed 74-acre mixed-use development located east of the US 301 corridor and directly north of Mill Branch Road. The site, which is currently zoned C-S-C (Commercial Shopping Center), is slated to be delivered over two phases. Phase 1 will include 91,000 square feet of office, 405,000

square feet of retail, and a 150-key hotel. Phase 2 will include 182,000 square feet of retail. The Bowie City Council conducted a public hearing on the concept of a proposed zoning text amendment that would permit mixed-use development, including multifamily and townhouse dwelling units in the C-S-C Zone, under certain circumstances. In addition to the June public hearing, the Bowie City Council reviewed proposed draft legislation at a public meeting held on September 3, 2019, and voted to recommend approval of the legislative proposal. The Prince George's County Council, which has ultimate authority, has yet to approve of the legislative proposal.

South Lake is a 381-acre proposed mixed-use community located at the intersection of MD 214 and the US 301 corridor. With an estimated project cost of \$344 million, the development is slated to deliver 344 single-family detached houses, 563 townhouses, 128 condominiums, 325 multifamily units, 600,000 square feet of office and retail, a 390-key hotel, a 5,272-square-foot clubhouse, several athletic fields, and a 25-acre park. In January 2019, the Prince George's County Planning Board unanimously approved the preliminary plan for South Lake.

Figure 33. Office Absorption, Deliveries, and Vacancy



Note: Net absorption measures the net change in the supply of commercial space over a defined period of time. Net absorption reflects total leased space, less vacant space, less demolished space, and less new deliveries. Positive net absorption indicates more commercial space was leased than was made available on the market.

Source: CoStar.

Office Market

OFFICE MARKET PERFORMANCE

The master plan area has experienced a moderate increase in total office space square footage over the last decade, with the delivery of Bowie's new City Hall in 2011 representing the largest recent increase in inventory.

The master plan area's slight decline in office vacancy in the past 10 years has been driven by decreases in Class B and Class C vacancy. Class A had an exceedingly high vacancy rate of 20.3 percent in 2019, compared to just 5.4 percent and 0 percent vacancy in Class B and Class C office space, respectively.

SUPPLY OVERVIEW

The Bowie-Mitchellville and Vicinity master plan area encompasses 1.8 million square feet of office space, with approximately 670,000 square feet classified as Class A office space. Office buildings within the Bowie-Mitchellville and Vicinity master plan area are typically small scale, with the average rentable building size being just 31,000 square feet with an average floor size of 13,000 square feet. The master plan area's office market is outperforming the office market of the County overall: the master plan area had a 2019 average rent per square feet of \$23.29 and a vacancy rate of 10.4 percent, while Prince George's County had an average rent per square feet of \$21.51 and a 13.6 percent vacancy rate.

In comparing Bowie's office market to other suburban communities in the region, Columbia, Maryland has seen the most private office development activity over the last five years: 840,000 square feet of new office space across 5 new buildings, compared to only 1

15,000-square-foot office building in the master plan area and no new construction in Odenton, Maryland during the same period.

While Columbia is a similarly positioned residential suburban community in proximity to Washington, D.C. and Baltimore, its office market is performing well as a result of concerted investment in its downtown, with an emphasis on adding new multifamily and retail to help attract tenants and create walkable, mixed-use communities. This is in keeping with typical employer preferences in today's 21st-century-knowledge economy that favors locations in walkable areas with a density of amenities, as opposed to isolated suburban office parks.

DEMAND OVERVIEW

Demand for private office space in the master plan area is primarily driven by tenants in the healthcare sector, including both clinicians and medical technology support. Inovalon, a technology company that provides cloud-based analytics and data-driven solutions to the healthcare industry, is headquartered in Bowie and employs over 600 people in the company's corporate headquarters along the MD 197 corridor.

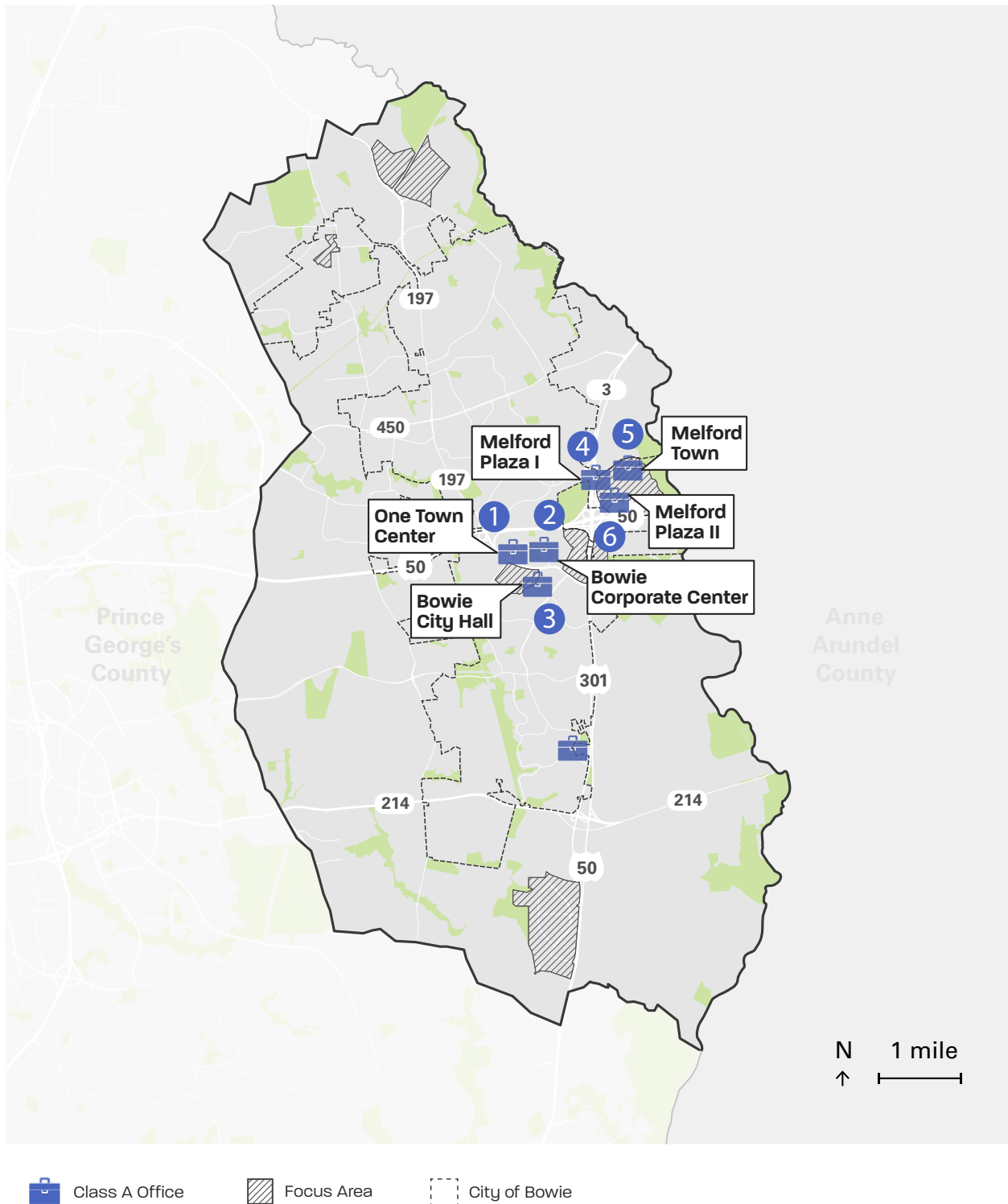
Employment growth over the last five years has largely stemmed from growth in the healthcare and social assistance industry sector, particularly within areas related to outpatient care centers, home health care services, mental health and substance abuse facilities, and individual and family services. Continued employment growth in the healthcare industry over the next five years could lead to increased demand for medical office space in Bowie.

Figure 34. Office Absorption, Deliveries, and Vacancy

	Bowie-Mitchellville and Vicinity Master Plan Area	Columbia, MD (Howard County)	Odenton, MD (Anne Arundel County)	Prince George's County
Total SF	1,802,000	12,454,000	357,000	26,686,000
Class A	672,000	5,947,000	0	8,641,000
Class B	943,000	5,685,000	291,000	13,550,000
Class C	187,000	822,000	66,000	4,495,000
Average Rent PSF (2019)	\$23.29	\$24.49	\$20.35	\$21.51
Vacancy (2019)	10.4%	10.9%	10.2%	13.6%
Recent Deliveries SF (2015-2019)	15,000	840,000	0	696,000

Source: CoStar.

Map 27. Notable Class A Office Projects



Note: Numbers in map refer to photos in Figure 35. Notable Class A Office Projects.

Source: CoStar.

Figure 35. Notable Class A Office Projects

1 ONE TOWN CENTER



Size (SF): 105,000
 Vacancy: 32.1%
 Year Delivered: 2004 (Renov.)
 Key Tenants: Chesapeake Medical Imaging, Anne Arundel Urology, Allergy and Asthma Center

2 BOWIE CORPORATE CENTER



Size (SF): 126,000
 Vacancy: 0%
 Year Delivered: 2006
 Key Tenants: Inovalon, Aesthetic Dermatology and Dermatologic Surgery Center

3 BOWIE CITY HALL



Size (SF): 80,000
 Vacancy: 0%
 Year Delivered: 2011
 Key Tenants: City of Bowie

4 MELFORD PLAZA I



Size (SF): 150,000
 Vacancy: 7%
 Year Delivered: 2006
 Key Tenants: Bohler Engineering, Skill Logic

5 MELFORD TOWN



Size (SF): 30,000
 Vacancy: 36.8%
 Year Delivered: 2002
 Key Tenants: Johns Hopkins Community Physicians, The Glaucoma Center

6 MELFORD PLAZA II



Size (SF): 152,000
 Vacancy: 37.1%
 Year Delivered: 2009
 Key Tenants: The Retina Group of Washington InstallNET, Alpert Schreyer Poe



Source: PeopleImages, iStock.

The healthcare and social assistance sector is Bowie-Mitchellville and Vicinity's largest and fastest growing industry, so the development of medical office space will likely be a principal driver of new office demand in the future.

DEVELOPMENT POTENTIAL

In terms of demand for office space in the master plan area, the healthcare and social assistance sector is Bowie-Mitchellville and Vicinity's largest and fastest growing industry, so the development of medical office space will likely be a principal driver of new office demand in the future. Other traditional office occupying industries in the master plan area experienced negative employment growth, including the professional services, retail trade, and finance sectors, while information and real estate sectors barely experienced any employment growth at all. The downward trajectory of employment in these sectors within the master plan area indicate limited future demand for private office space. The master plan area would likely need the support of an institutional anchor such as the County or Bowie State University (BSU) in order to make private non-medical office space feasible for development. BSU has the opportunity to drive demand for flex office and coworking space located near campus by capitalizing on the university's ability to partner with prospective research and corporate tenants who would like to work alongside BSU's faculty and students.

With a known office pipeline of 911,000 square feet, there is potential for office vacancy to increase beyond current levels, especially since employment growth lags behind the amount of total office supply expected to enter the master plan area. Employment growth in the master plan area has been minimal over the last decade, with a compound annual growth rate (CAGR) of 1.1 percent from 2010 to 2019. This growth rate is projected to slow over the next five years, with employment projected to grow at a CAGR of 0.4 percent between 2019 and 2024. This could result in an oversupply of office product and possible increases in office vacancy if there are not both population and employee increases in the master plan area. Much of Bowie-Mitchellville and Vicinity's existing office market consists of small professional offices and small businesses that serve the local population, so an increase in office supply will need to correlate with population growth to avoid further increases in office vacancy in the area. Given low rents, lack of development activity, and overall Class A market performance, the Bowie office market is not strong enough to support speculative office development, so new office development should only proceed if a tenant or institutional anchor is on board to support project feasibility.

Industrial Market

INDUSTRIAL MARKET PERFORMANCE

The master plan area's industrial market is concentrated within the Collington Trade Zone, which has several competitive advantages for attracting industry tenants, including its geographic location, which provides accessibility to Baltimore's ports and ease of access to Washington, D.C. The zone's large size (over 1,000 acres) and the presence of a foreign trade zone within its borders, which provides attractive tariff exemptions, also add to its competitiveness. The recommended upgrade (F-10) along with the future replacement of the Harry W. Nice Bridge will also further enhance the trade zone's industrial competitive advantage, as both updates will further increase the master plan area's regional connectivity, improving vehicular and trucking access and bringing opportunities for additional industrial employment.

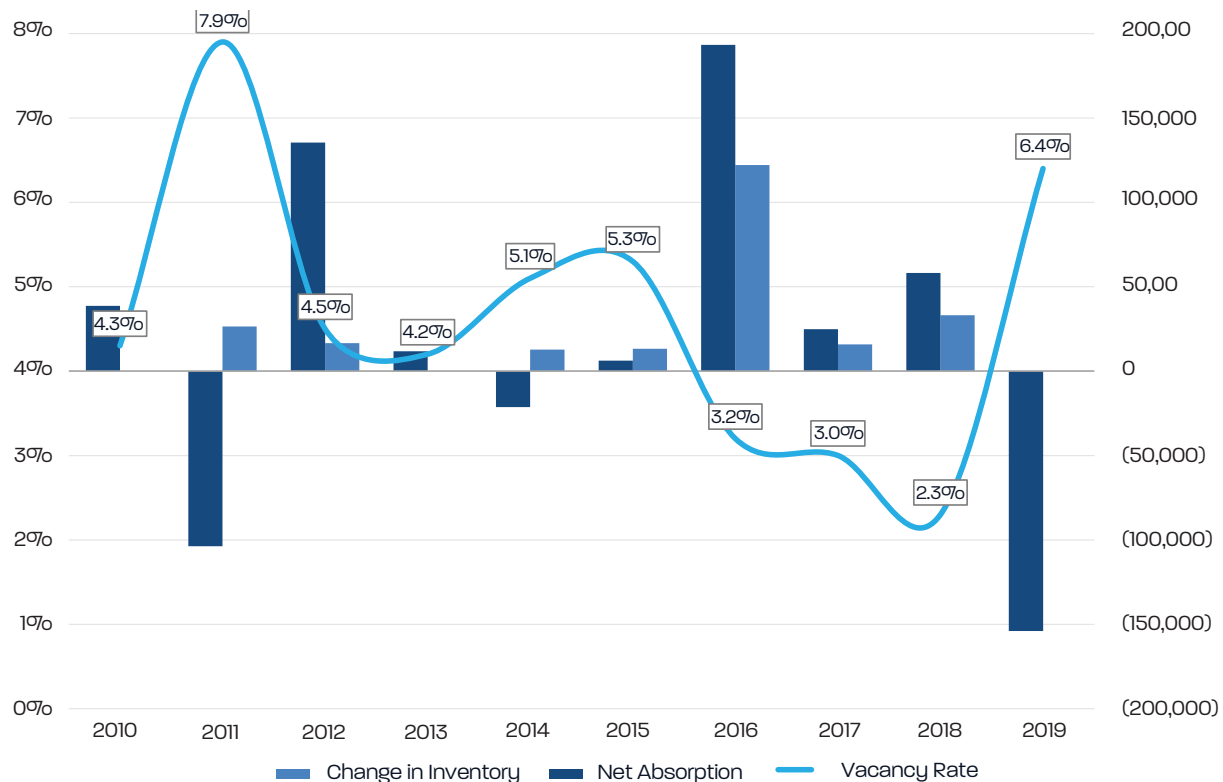
Industrial space has largely absorbed well within the master plan area, driven by sizable companies leasing large-scale warehouse buildings to expand capacity in the region. It is these same sizable tenants who

contribute to the fluctuating vacancy rate of industrial space, as tenants have moved in and out of the region over the past 10 years.

INDUSTRIAL MARKET SUPPLY

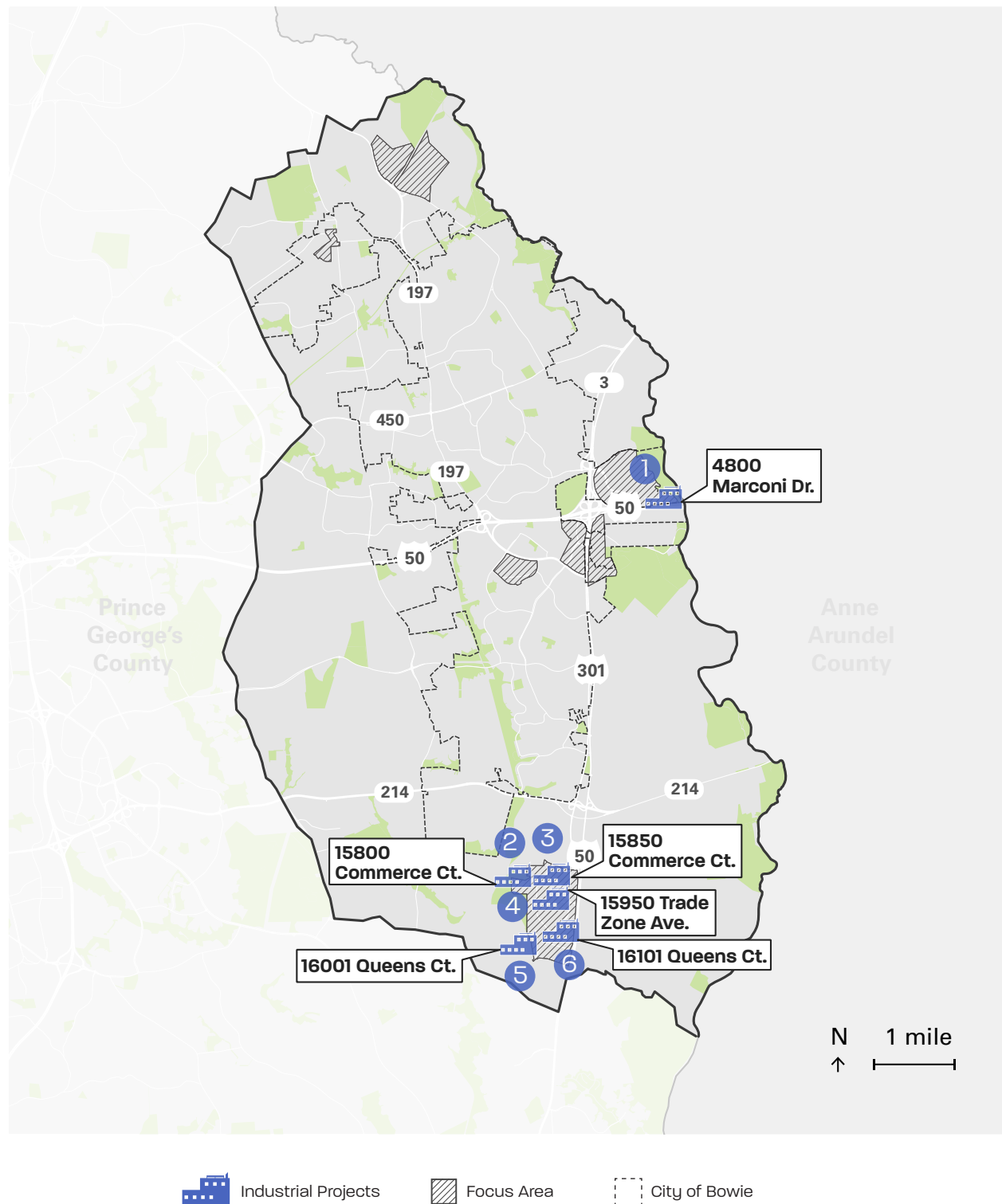
The Bowie-Mitchellville and Vicinity master plan area contains 4.2 million square feet of industrial space, of which 3.2 million square feet is concentrated within the Collington Trade Zone. The Collington Trade Zone is the sole concentrated node of industrial space in the master plan area, as other industrial space in the area is more scattered and not found in clusters. The Collington Trade Zone is comprised of a variety of industrial uses, including commercial printing, distribution, packaging, warehousing, construction, and light manufacturing. Many large multinational corporations have sizable distribution centers of over 150,000 square feet in the Collington Trade Zone to distribute product throughout the region, including Nordstrom, FedEx, and La-Z-Boy.

Figure 36. Industrial Absorption, Deliveries, and Vacancy



Source: CoStar.

Map 28. Notable Industrial Projects



Source: CoStar.

Figure 37. Notable Industrial Projects

1 4800 MARCONI DRIVE



Size (SF): 31,000
Building Class: B

Rent PSF: \$7.41
Year Built: 2017

4 15950 TRADE ZONE AVENUE



Size (SF): 43,000
Building Class: A

Rent PSF: \$9.52
Year Built: 2005

2 15800 COMMERCE COURT



Size (SF): 90,000
Building Class: A

Rent PSF: \$7.53
Year Built: 2005

5 16001 QUEENS COURT



Size (SF): 175,000
Building Class: B

Rent PSF: \$7.86
Year Built: 2014

3 15850 COMMERCE COURT



Size (SF): 111,000
Building Class: A

Rent PSF: \$7.09
Year Built: 2005

6 16101 QUEENS COURT



Size (SF): 221,000
Building Class: A

Rent PSF: \$7.31
Year Built: 2016

INDUSTRIAL MARKET DEVELOPMENT POTENTIAL

The industrial market within the master plan area is anticipated to grow by 115,000 square feet as a result of MRP Industrial's Collington Park Project located within the Collington Trade Zone. After the delivery of FedEx Ground's 175,000-square-foot package sorting facility in 2014 and La-Z-Boy's 221,000-square-foot distribution center in 2016, MRP Industrial, the owner and developer of Collington Park, is slated to develop a 90,000-square-foot warehouse facility in addition to a 25,000-square-foot industrial building.

In terms of industrial growth, commercial printing manufacturing (except screen and books) is the only industrial sector that has experienced employment growth over the last 5 years, with total jobs increasing by 44 percent from 2015 to 2019. This sector encompasses businesses that engage in commercial printing activities, such as stationery and labels, as well as photocopying services and printing materials using digital printing equipment. Most other industrial sectors within the master plan area have experienced no change in employment at all over the last five years, while textile product mills, cleaning manufacturing, and machine manufacturing have all experienced decreases in employment over the same period. Based on these recent trends, new industrial development should only proceed when interested corporate tenants are secured.

Retail Market

RETAIL MARKET PERFORMANCE

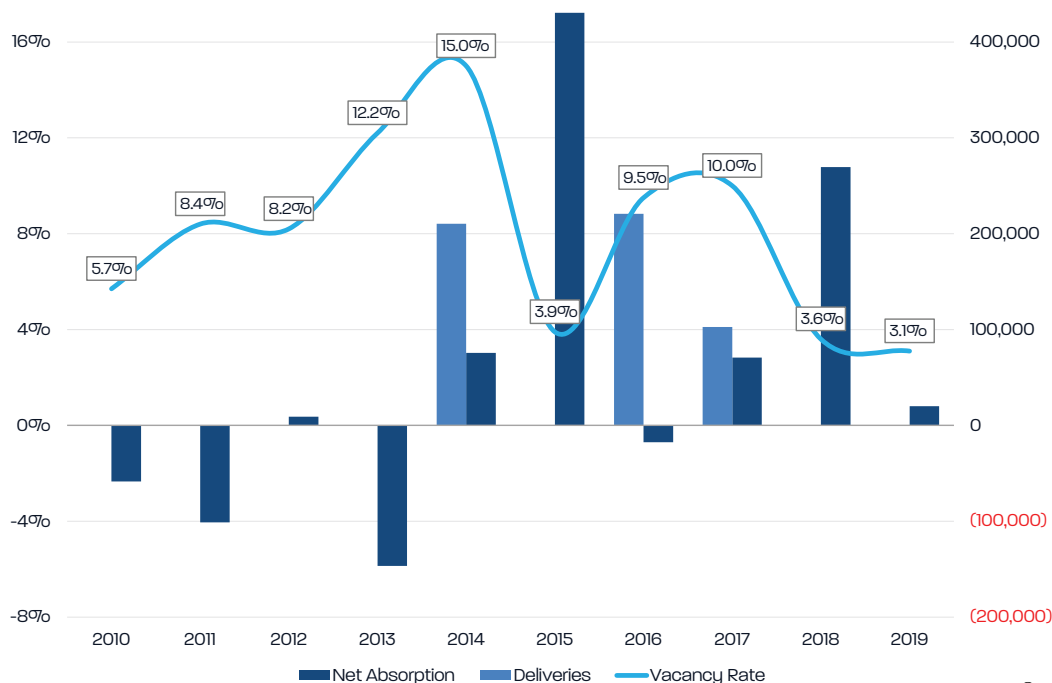
The master plan area's retail market experienced a spike in vacancy in 2019 due to a variety of large-scale retail chains going out of business, including Sears and A.C. Moore.

Prior to the closing of these retail chains in 2019, retail vacancy in the master plan area had been at a 10-year low for the past three years, with vacancy reaching an all-time low of just 2.3 percent in 2018. This indicates sustained demand for neighborhood retailers from high-earning residents who have disposable income, as well as from older residents who may prefer shopping at traditional brick and mortar retail stores.

RETAIL MARKET SUPPLY

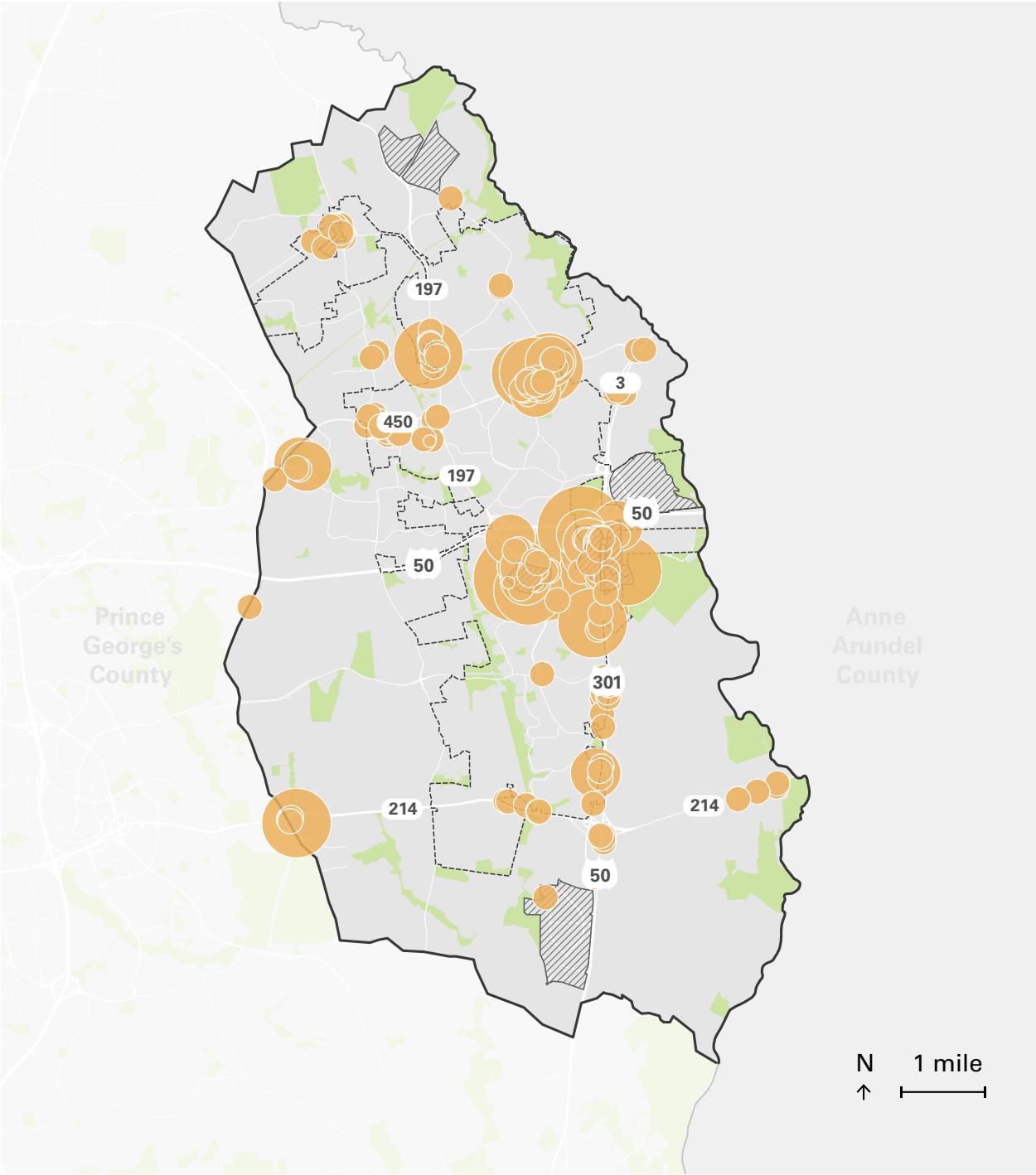
The Bowie-Mitchellville and Vicinity master plan area includes approximately 3,753,000 square feet of retail space and currently has another 887,000 square feet of retail within its known development pipeline. The average floor size and average leasable space for retail in the master plan area is 19,000 square feet in a single-story format. The majority of retail within the Bowie master plan area is located within shopping centers serviced by large surface parking lots situated along its three main corridors.

Figure 38. Retail Absorption, Deliveries, Vacancy



Source: CoStar.

Map 29. Existing Distribution of Retail



Rentable Square Footage (SF)



Source: CoStar.

- **The MD 197 (Collington Road) Corridor** primarily consists of retail concentrated at the southern end of the corridor around the 572,000-square-foot Bowie Town Center strip, which is largely comprised of national retail chains and fast casual restaurants. The 103,000-square-foot Bowie Plaza is the only concentration of retail located further north along the corridor at the intersection of MD 197 (Collington Road) and Old Chapel Road and consists primarily of neighborhood convenience retail. Old Town Bowie is also home to much smaller-scale retail tenants, which are mostly comprised of older antique shops and auto repair stores, with Old Bowie Town Grille being the only restaurant located within the small community.
- **The MD 450 (Annapolis Road) Corridor** is home to three shopping centers with big-box anchor stores complemented by in-line retail. These shopping centers include the 186,000-square-foot Hilltop Plaza, the 264,000-square-foot Free State Shopping Center, and the 135,000-square-foot Bowie Marketplace, all of which are redevelopment projects that replaced previously aging shopping centers.
- **The US 301 (Robert Crain Highway) Corridor** has the largest concentration of retail, which largely consists of standalone big-box anchor tenants with large surface parking lots at the intersections of US 50 (John Hanson Highway) and US 301 (Robert Crain Highway) within Bowie Town Center.

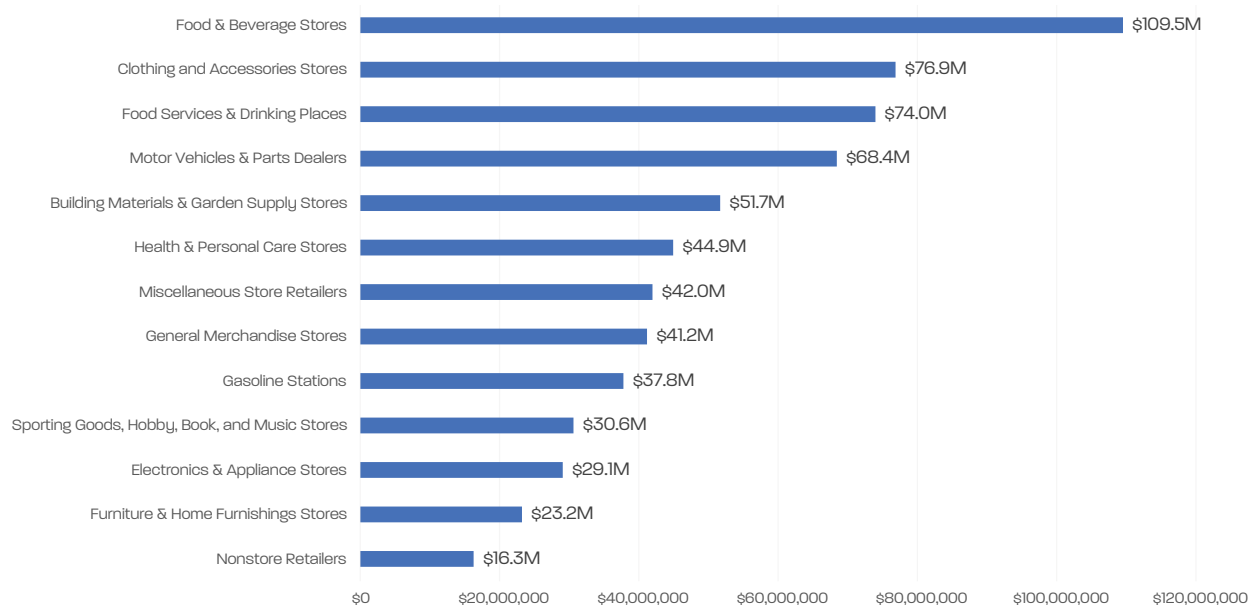
RETAIL MARKET DEMAND

Population trends project that senior residents will comprise the majority of household growth within the master plan area. This growing senior population will drive demand for retail, and seniors are increasingly favoring walkable, mixed-use communities that encompass a variety of retail uses that suit their daily needs. As Plan 2035 states, both young, highly-skilled workers and seniors increasingly prefer to use public transportation, walk, and bike rather than drive to work or to complete errands. Plan 2035 emphasizes the need for mixed-use communities to incorporate improved mobility options for targeted population groups, particularly the County's elderly, mentally and physically disabled, and low-income households in suburban and rural areas not served by transit on a regular basis, so that all Bowie residents have access to connected communities, including potential future retail development.

UNMET RETAIL SPENDING

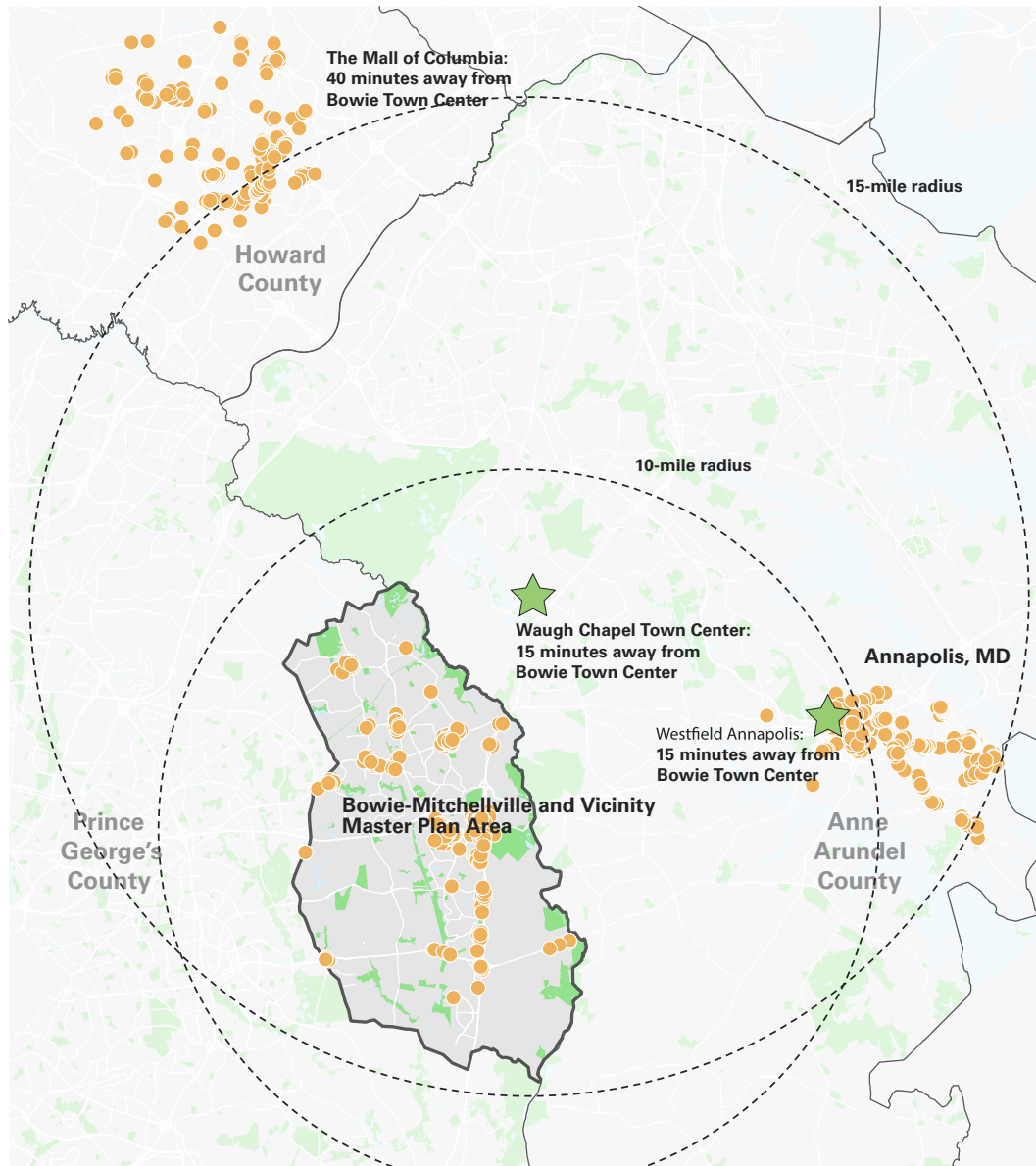
A retail gap exists when residents are forced to spend their income outside of their vicinity due to lack of retail options in their area. Supply of retail within the area does not meet demand, and residents' unmet spending potential is the dollar amount being spent outside of the master plan area. In the master plan area, all major retail sectors have a large retail gap, as seen in Figure 39. Existing Retail Gap by Industry Sector (2017).

Figure 39. Existing Retail Gap by Industry Sector (2017)



Source: ESRI Business Analyst, 2017.

Map 30. Master Plan Area's Existing Retail in Comparison to Columbia and Annapolis



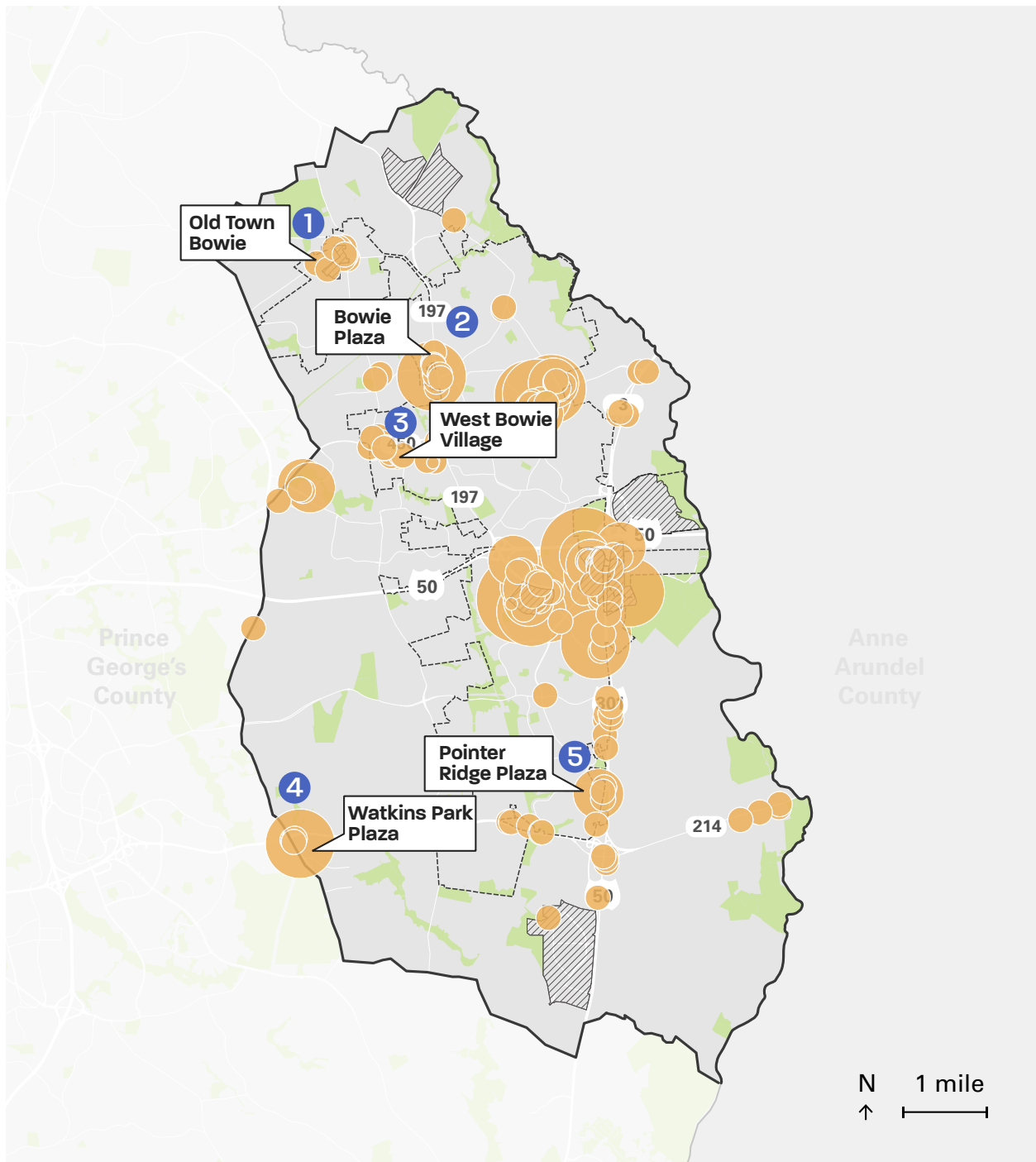
● Retail spaces

Source: CoStar.

The existence of this retail gap across all major sectors in the master plan area indicates that Bowie residents are currently traveling outside of the area to fulfill their shopping needs. While the master plan area is home to a wealthier residential base than much of the County, the area's low-density suburban character lacks the population density required to entice retail tenants to the market. These Bowie residents are already being served by existing retail outlets in other nearby communities, so without increasing residential density within the master plan area, it will be difficult to attract additional retail outlets.

Map 30. Master Plan Area's Existing Retail in Comparison to Columbia and Annapolis highlights the Bowie master plan area's existing retail supply in comparison to the existing retail supply in Columbia, MD and Annapolis, MD. Both areas have higher concentrations of retail along key corridors such as Snowden River Parkway in Columbia and West Street in Annapolis, when compared to retail in Bowie. Many retailers such as Wegmans, Trader Joe's, Costco, and The Cheesecake Factory will be hesitant to develop additional stores within the master plan area, as their existing nearby stores draw customers from a wide trade area which already includes the existing base of Bowie residents.

Map 31. Aging Shopping Centers



Existing Retail: Rentable Square Footage (SF)



Source: CoStar.

Figure 40. Aging Shopping Centers

1 OLD TOWN BOWIE



Type: Convenience Retail
Size (SF): 45,000

Rent PSF: \$20.43
Year Delivered: 1937

4 WATKINS PARK PLAZA



Type: Convenience Retail
Size (SF): 111,000

Rent PSF: \$24.51
Year Delivered: 1966

2 BOWIE PLAZA



Type: Convenience Retail
Size (SF): 103,000

Rent PSF: \$15.73
Year Delivered: 1966

5 POINTER RIDGE PLAZA



Type: Convenience Retail
Size (SF): 69,000

Rent PSF: \$22.23
Year Delivered: 1966

3 WEST BOWIE VILLAGE



Type: Convenience Retail
Size (SF): 20,000

Rent PSF: \$18.43
Year Delivered: 1975

OPPORTUNITIES TO MEET UNMET RETAIL SPENDING POTENTIAL

There is potential to target these existing retail spending gaps by developing new infill retail within the area's main nodes and corridors. An expansion of Bowie's residential base will be key to supporting new retail.

- **MD 197 (Collington Road) Corridor:** The MD 197 (Collington Road) corridor can provide new retail tenants across a variety of sectors through the redevelopment of Bowie Plaza. Due to the lack of grocery tenants north of MD 450, there is an opportunity to redevelop Bowie Plaza into a neighborhood shopping center with a grocery-anchor tenant as well as in-line retail that includes an assortment of fast-casual dining options, general merchandise stores, and other miscellaneous retailers.
- **MD 450 (Annapolis Road) Corridor:** With MD 450's grocery-anchored shopping centers performing well along the eastern corridor, there is potential to leverage these successful retail redevelopment projects by further increasing retail infill along the corridor's western end. This includes the potential development of bookstores, clothing stores, or full-service restaurants.
- **US 301 (Robert Crain Highway) Corridor:** With most of US 301's retail concentrated around Bowie Town Center, an opportunity exists to increase retail infill along the southern end of the corridor through the redevelopment of Pointer Ridge Plaza. If redeveloped, the retail center has potential to be a grocery-anchored neighborhood shopping center that also offers different food and beverage, health and personal care, and general merchandise options near MD 214.
- **Bowie State MARC Station Campus Center:** Due to the lack of retail available near BSU's campus, there is an opportunity to provide fast-casual dining options, a small grocery tenant, and general merchandising stores adjacent to campus to cater to BSU students, faculty, and staff, as well as to MARC commuters.

DEVELOPMENT POTENTIAL

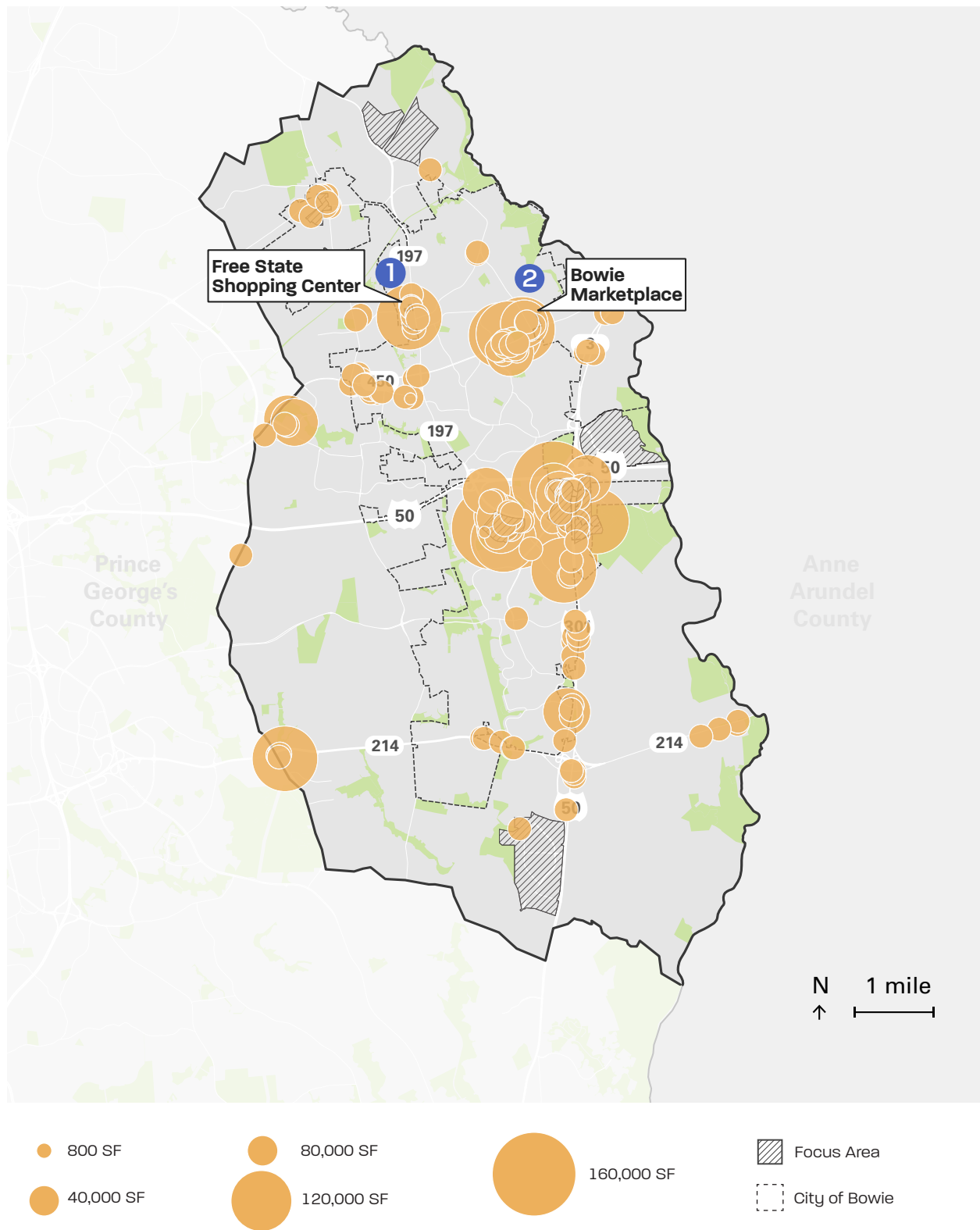
There are a variety of aging shopping centers that lack quality retail in the master plan area that can be redeveloped to increase infill along Bowie's prime corridors and offer new shops to meet unmet retail spending.

Case Studies of Successful Retail Center Redevelopments

Free State Shopping Center and Bowie Marketplace are examples of how successful redevelopment of aging retail centers can help strengthen rents and attract key retail tenants along a prime corridor.

1. **Free State Shopping Center** is a 264,000-square-foot anchored retail center located along MD 450 (Annapolis Road), just north of Bowie Marketplace. Renovated in 2006 by Therrien Waddell, this previously aging shopping center was converted into a contemporary retail center via physical improvements such as new storefront facades, roofs, HVAC systems, electric and water service, loading docks, and storeroom extensions for each retailer. Anchor retail tenants such as Giant, Office Depot, Ross Dress for Less, and TJ Maxx are among the various retailers located within the shopping center. Free State Shopping Center has currently been able to achieve an average rent per square foot per year of \$30.00 due to this successful large-scale revitalization. It was purchased by New Market Properties LLC for \$72 million in 2019.
2. **Bowie Marketplace** is a 135,000-square-foot retail center located directly south of Free State Shopping Center along the MD 450 (Annapolis Road) corridor. The \$22 million redevelopment is anchored by Harris Teeter and features several restaurants and other businesses. Bowie Marketplace is a rehabilitation of the old Marketplace shopping center, which continuously lost retail tenants including its previous anchor, Safeway. The old Marketplace was considered an eyesore to many within the community as its condition decayed before being purchased by Berman Enterprises in 2012 for future development. After its delivery in 2016, Bowie Marketplace currently achieves an average rent per square foot per year of \$31.00 as a result of this successful redevelopment effort.

Map 32. Successful Retail Redevelopments



Source: CoStar.



Source: M-NCPPC.

Vista Gardens Marketplace.

Discussion of Challenges and Opportunities

It will be difficult for the master plan area to attract new commercial development without increasing its residential base. Pursuing infill residential development along Bowie's main corridors is an opportunity to increase the master plan area's residential density to build a base large enough to sustain additional retail outlets.

This can be accommodated by redeveloping aging shopping centers as well as increasing infill development along primary corridors. Planning for mixed-use development that includes residential, retail, and office clustered in existing centers is the primary way for Bowie to begin creating walkable, vibrant communities as envisioned by Plan 2035:

- MD 197 Corridor:** Due to the lack of retail options at the northern end of the corridor, there is potential for retail development near BSU in order to provide students with retail options near campus. There is also potential for new office development near BSU's campus, if the university is interested in supporting new development for university research purposes. Additionally, there is an opportunity to increase the amount of medical office space located at the southern end of the corridor in an effort to carve out a medical office cluster within the master plan area to capture future anticipated employment growth within the healthcare sector. The redevelopment of Bowie Plaza can help attract new retail tenants north of Bowie Town Center while also helping to close existing retail gaps within the market. There is also potential to increase retail density in Old Town Bowie; however, approval from existing residents is critical in order to increase residential or commercial density within the node.
- MD 450 Corridor:** Given the strong performance of MD 450's grocery-anchored retail centers, there is potential to leverage these successful retail redevelopment projects by further increasing retail infill along the corridor. With the majority of retail located along the eastern end of the corridor, there is an opportunity to strengthen the corridor with retail infill along the corridor's western end. Since the MD 450 corridor is already home to five grocery anchor tenants, other sectors of retail should be developed to complement these grocery tenants, such as restaurants, clothing apparel, and general merchandise stores. The perceived opportunity for increased retail infill along the western end of MD 450 takes into account the presence of the Vista Gardens Marketplace, located further west along MD 450 outside of the master plan area.
- US 301 Corridor:** The South Lake project at the intersection of US 301 and MD 214 presents an opportunity to increase retail density on the southern end of the corridor by redeveloping Pointer Ridge Plaza. This would help attract new retail tenants south of Bowie Town Center near MD 214, which currently lacks substantial retail tenants across all sectors. The development of new industrial space within the Collington Trade Zone would be most feasible if a large-scale corporate tenant were to support new development by setting up tenancy within a new industrial development built-to-suit for their individual manufacturing needs.



Mill Branch Pond



Source: M-NCPPC.

Melford Town Center.

2.4 Land Use, Zoning, and Urban Form



There exists an opportunity in the Bowie-Mitchellville and Vicinity master plan area to accommodate new growth while allowing existing residents to comfortably age in place. Bowie's fastest growing population are older adults, aged 55 and up, of which those aged 65 and above are the fastest growing group. However, new development within the master plan area appears to be attracting young millennial adults aged 25–34, a population group that also increased between 2010 and 2018. Understanding how best to capitalize on this opportunity requires an examination of land use, zoning, and urban form in the master plan area.

This section examines a range of questions related to land use and growth in the master plan area: how best can the master plan area accommodate new residential and commercial growth while preserving natural resources and quality of life? Can commercial development in key nodes create jobs and improve quality of life for new and existing residents? How can new commercial development reinvigorate aging and

underperforming commercial centers? Which zoning classes in Prince George's County have been most successful in encouraging this kind of growth?

This section first examines land use in the master plan area, contextualizing findings to Prince George's County overall. Next, it analyzes built form, drawing attention to built housing and commercial typologies of note. Finally, the section analyzes zoning in the master plan area to understand its historical and present role in shaping the land uses and the built form.

COVERED IN THIS SECTION:

- Land Use and Urban Form
- Zoning

Land Use and Urban Form

LAND USE PATTERNS

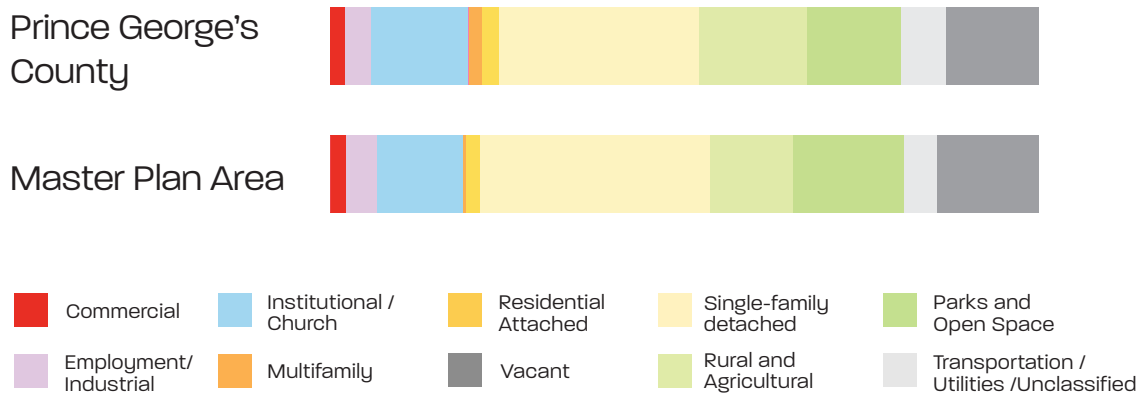
Land in the master plan area is primarily occupied by low-density residential uses (including rural and agricultural) and parks and open space. Together, these uses represent 63 percent of the master plan area's acreage.

Land use patterns in the master plan area are similar to those of Prince George's County overall (See Figure 41. Existing Land Use, County and Master Plan Area), aside from subtle differences. Residential land use in the master plan area is almost exclusively single-family detached housing; as a share of total land use, the County has more mixed-use and multifamily developments.

Map 33. Master Plan Area Existing Land Uses, examines the spatial distribution of land uses in the master plan area. A few spatial patterns emerge:

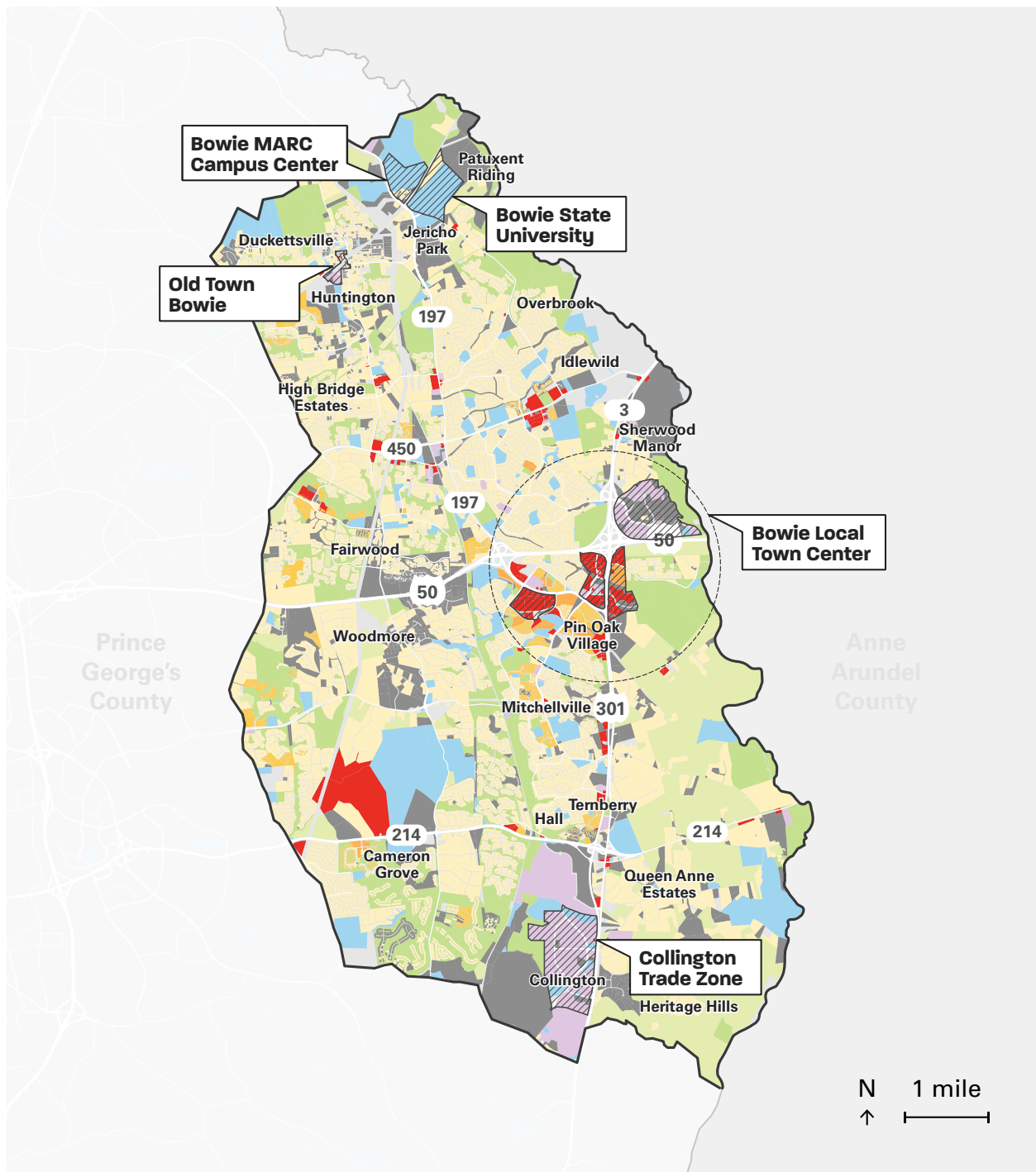
1. Single-family detached residential land use is spread throughout the master plan area.
2. Rural and agricultural land use is concentrated in the growth management area, east of US 301/ MD 3 (Crain Highway).
3. Higher density residential land uses—attached homes, townhouses, and multifamily housing—are concentrated around existing commercial nodes and along key corridors. Most higher density housing is located in and around the Bowie Local Town Center, with additional developments along MD 450 (Annapolis Road) and MD 214 (Central Avenue) corridors.
4. Commercial land uses tend to be located on large parcels.
5. Institutional uses, such as places of worship and public schools, are spread throughout the master plan area and tend to occupy large parcels.
6. Other than transportation corridors, a number of other linear features divide the master plan area, including transmission lines and natural corridors. These features can be seen in Map 33. Master Plan Area Existing Land Uses.

Figure 41. Existing Land Use, County and Master Plan Area

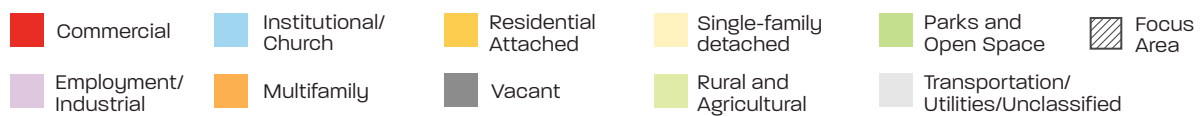


Source: GIS Data Catalogue, Planning Department Of Prince George's County

Map 33. Master Plan Area Existing Land Uses



Land Use



Source: GIS Data Catalogue, Prince George's County Planning Department.

PLAN 2035 LAND USE ALIGNMENT

The 2014 *Plan Prince George's 2035 Approved General Plan* (Plan 2035) lays out a vision for land uses for the County to achieve by 2035, called generalized future land use 2035 (GFLU). Plan 2035 seeks to preserve the County's natural assets while densifying areas with public transit access near Washington, D.C. (in particular, within the I-95/I-495 [Capital Beltway]). Map 34. Generalized Future Land Use in Prince George's County highlights this vision. When comparing existing land uses to the GFLU, one noticeable change is the dramatic increase in the

share of high- and medium-density housing typologies and mixed-use areas in the County's future land use. Additionally, there is a reduction in exclusively commercial areas, with most of these centers re-envisioned as mixed use. This is also the case in the master plan area as seen in Map 35. Generalized Future Land Use in Bowie and Vicinity (2014).

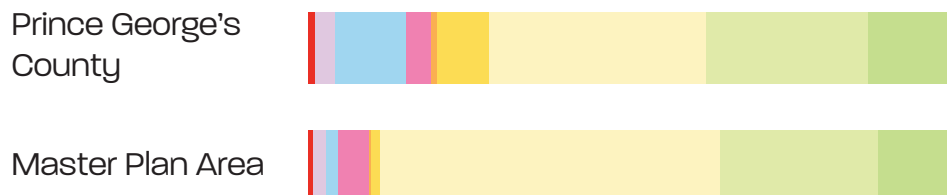
Plan 2035 re-envision the master plan area's commercial nodes as mixed use, rather than simply commercial areas ringed by high- and medium-density residential development. Notably, the GFLU proposes the large parcel north of the Collington Trade Zone be redeveloped as mixed-use.

Figure 42. Existing and Generalized Future Land Use (as Percentage of Total Land Use)

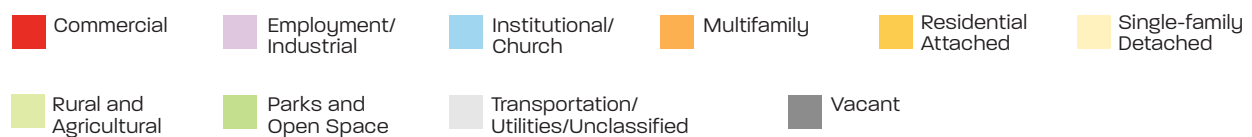
Existing Land Use



Generalized Future Land Use



Existing and Use Category

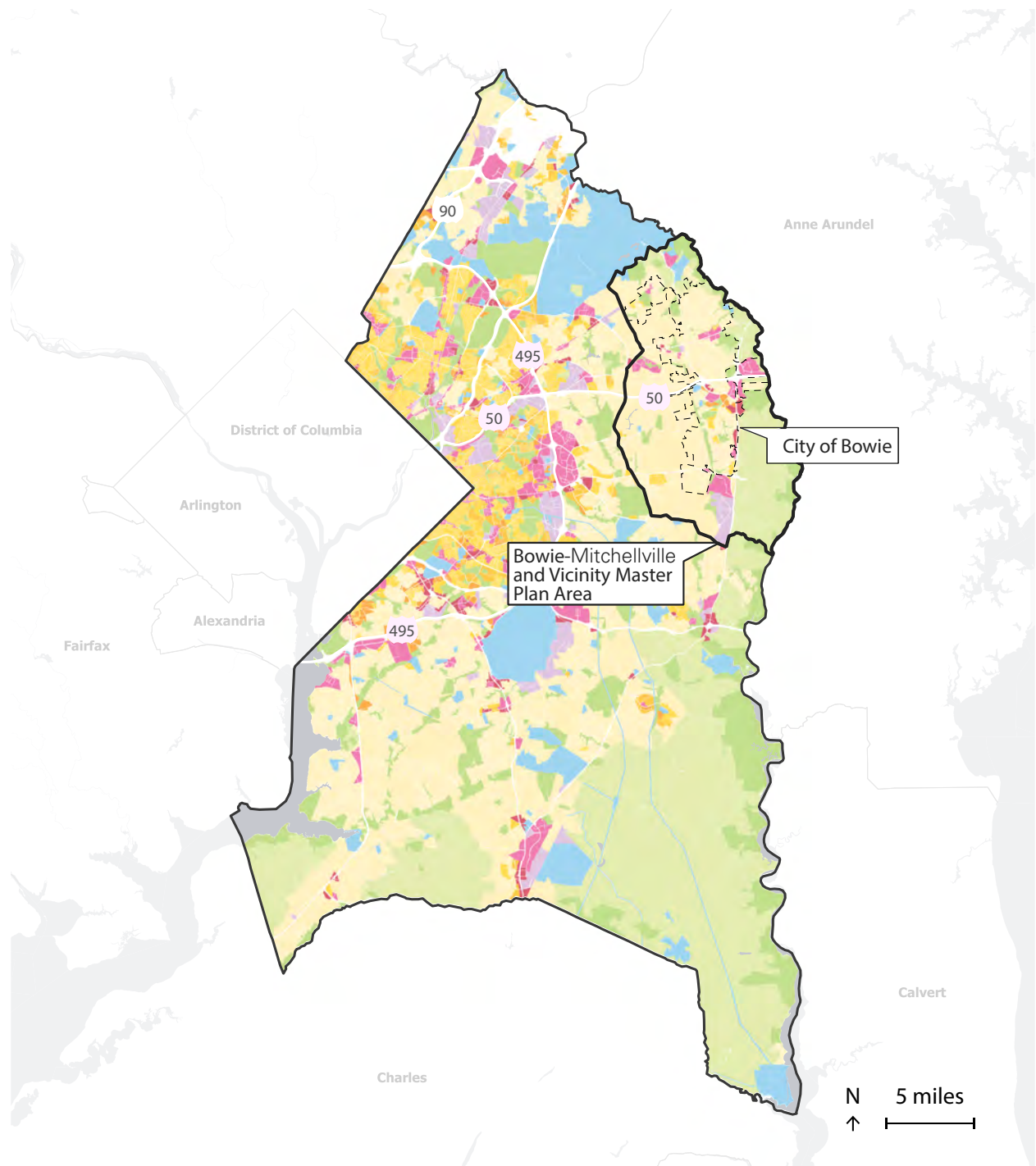


Generalized Future Land Use Category

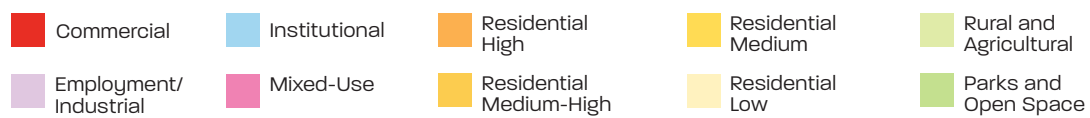


Source: GIS Data Catalogue, Planning Department Of Prince George's County.

Map 34. Generalized Future Land Use in Prince George's County (2014)

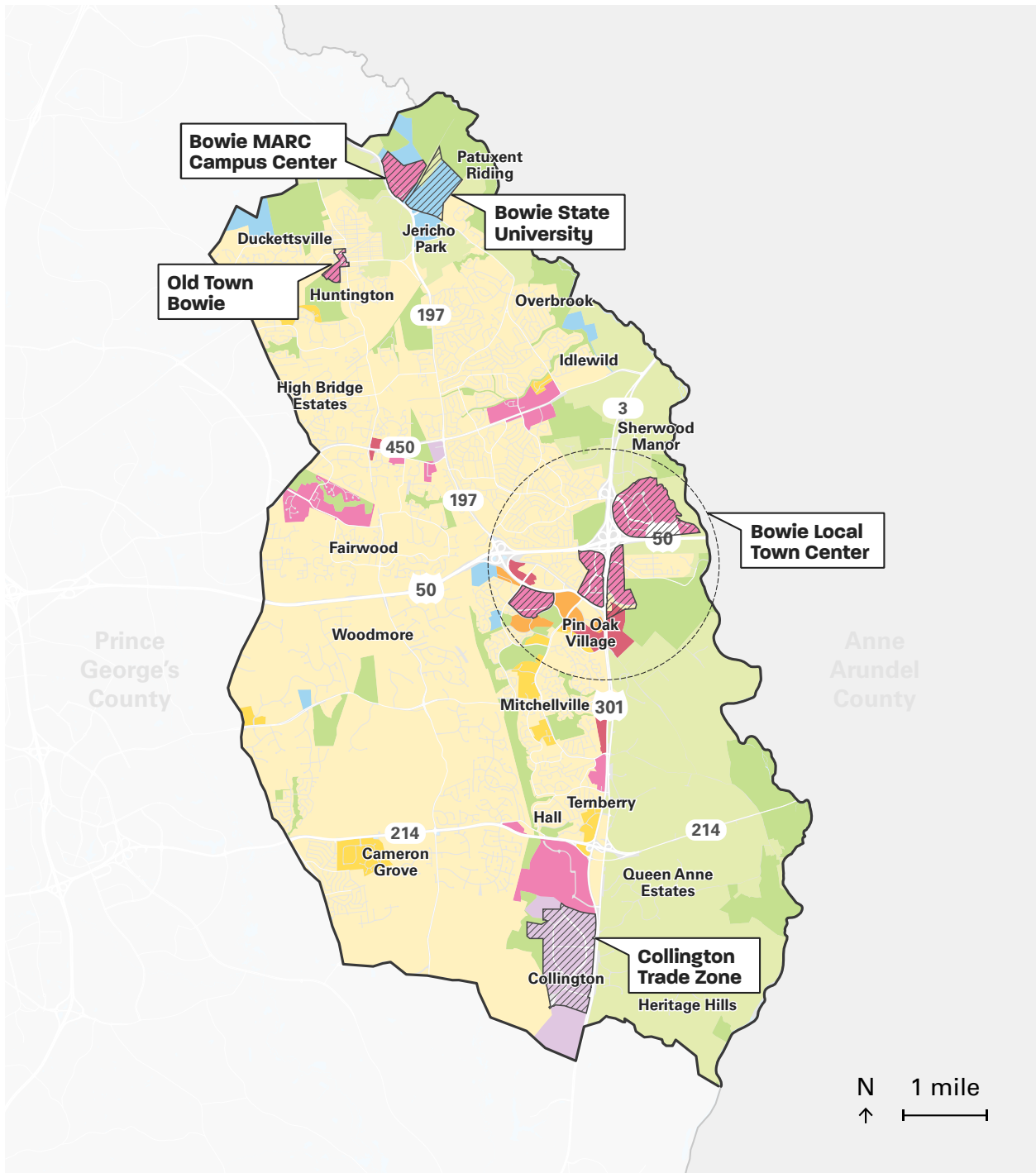


Future Land Use Category

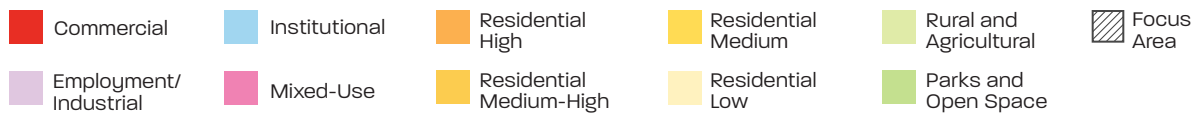


Source: GIS Data Catalogue, Prince George's County Planning Department.

Map 35. Generalized Future Land Use in Bowie-Mitchellville and Vicinity (2014)

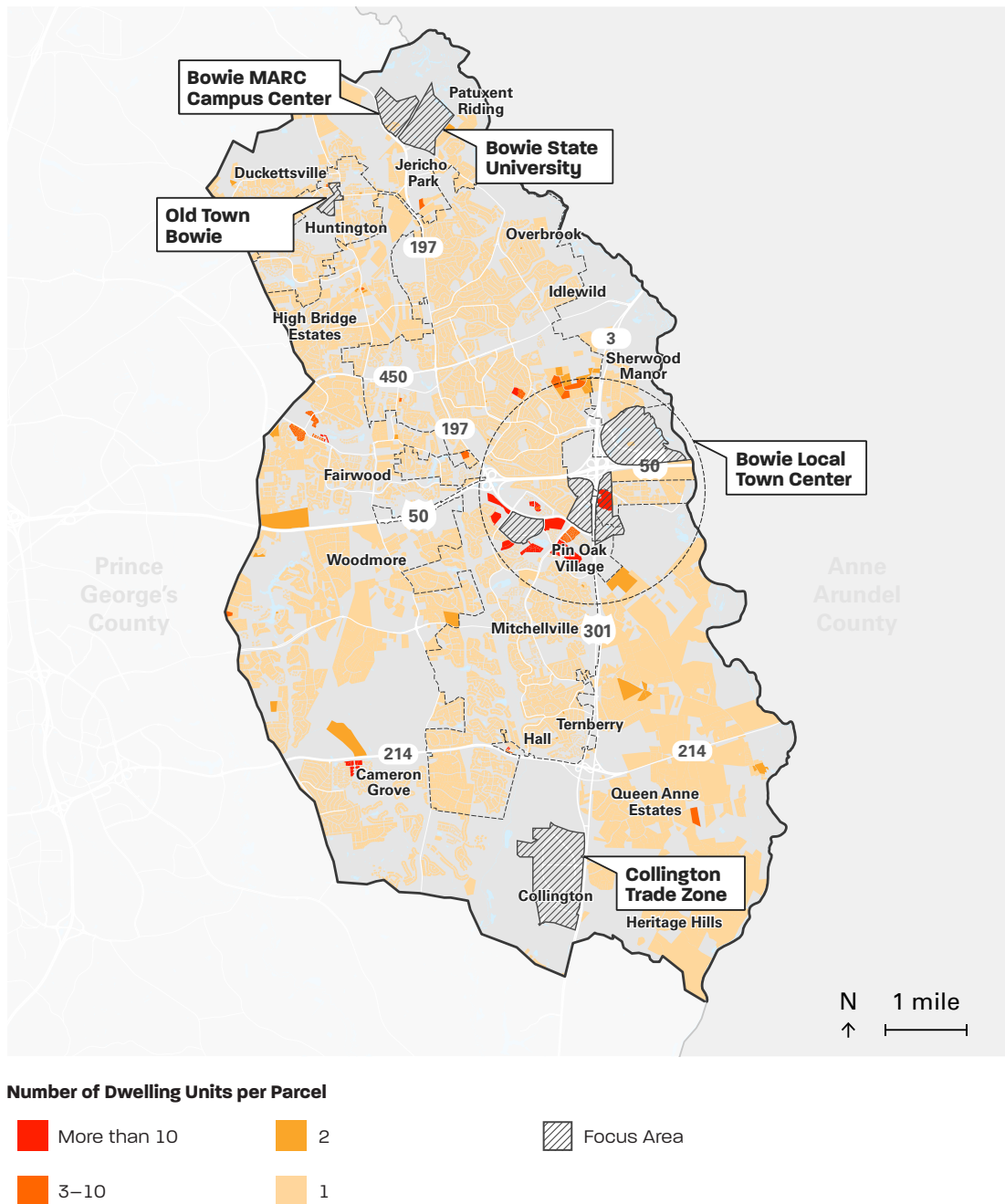


Generalized Future Land Use (2035)



Source: GIS Data Catalogue, Prince George's County Planning Department.

Map 36. Dwelling Units by Parcel in the Master Plan Area (2001–Present)



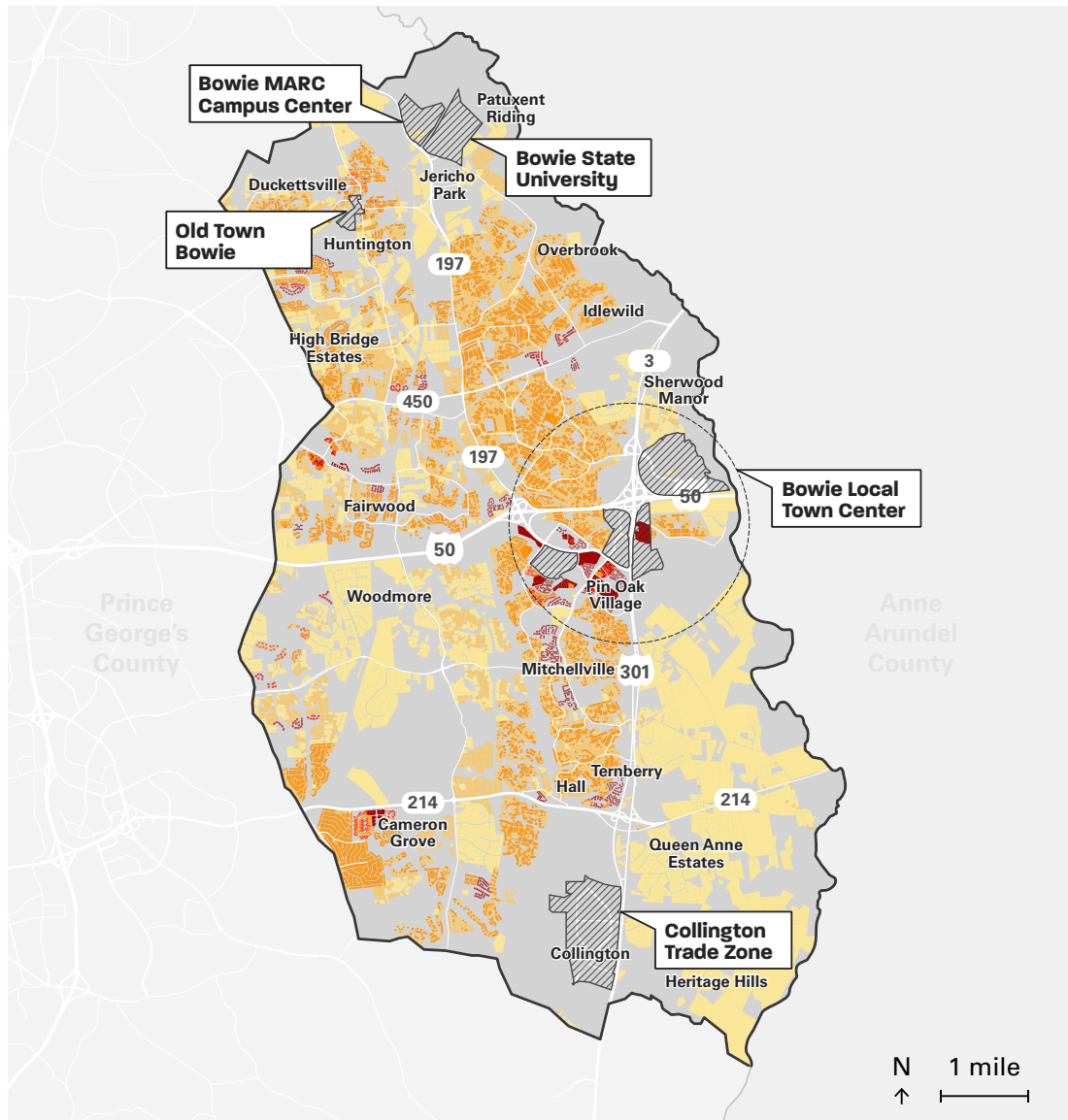
Source: GIS Data Catalogue, Prince George's County Planning Department.

DENSITY

One-third of the master plan area is developed with single-family detached residential development. Much of the City of Bowie north of US 50 is historic Levittown. The history of the Levittown subdivision is discussed in detail in Section 2.6. Community Heritage, Culture, and Design. Map 36. Dwelling Units by Parcel

in the Master Plan Area (2001–Present) illustrates the prevalence of single-family detached residential development in the master plan area. But for several parcels, most located in and around the Bowie Local Town Center, all residential parcels in the master plan area host one dwelling unit per parcel.

Map 37. Density Units in the Master Plan Area (2001–Present)



Density Units: Dwelling Units per Acre (Net)



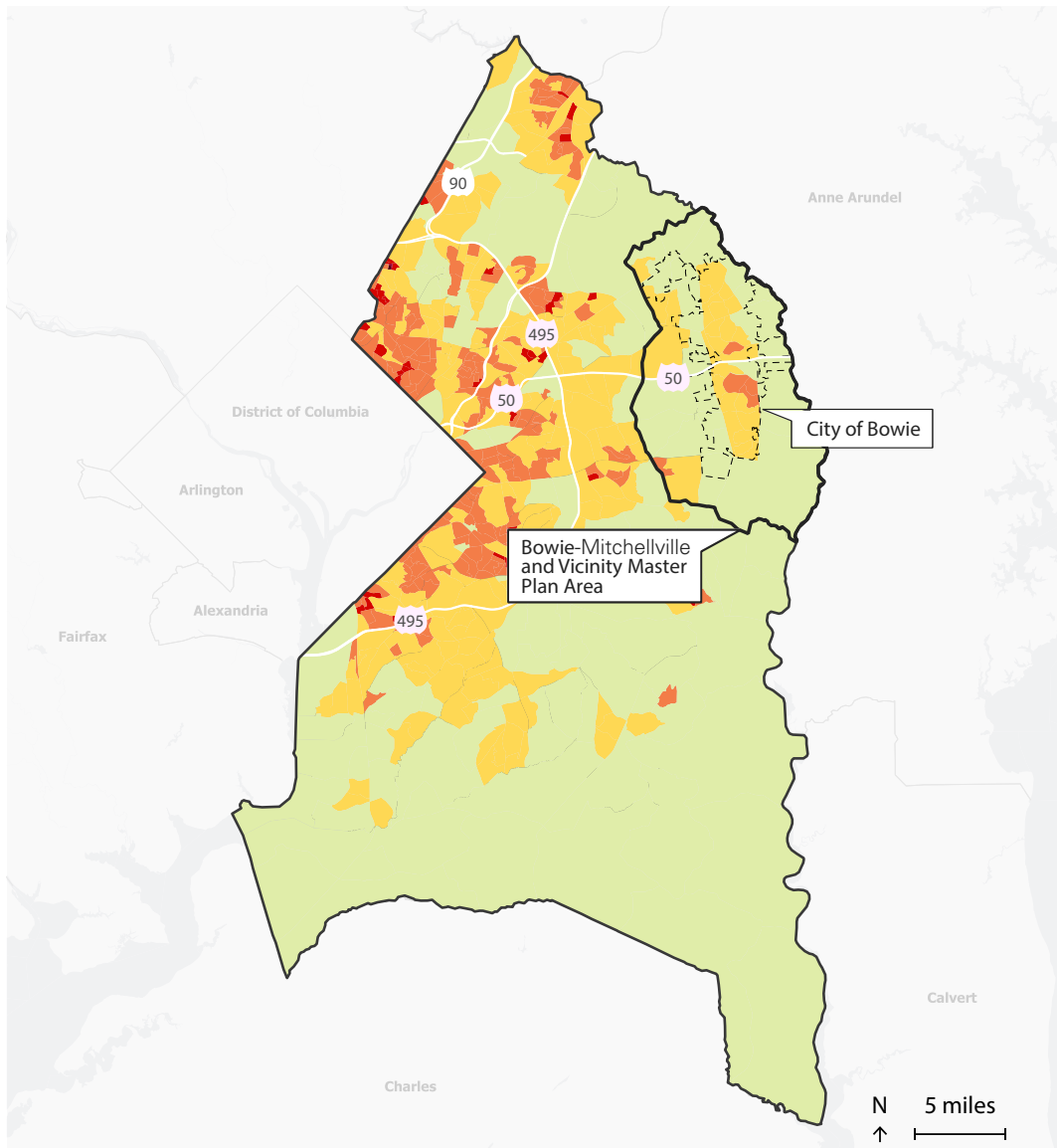
Source: GIS Data Catalogue, Prince George's County Planning Department.

Nevertheless, considerable variation exists in the dwelling unit density of the master plan area, within the category of single-family detached development. In other words, within the category of single-family detached zoning, some development types may be far denser than others due to the different minimum and maximum lot sizes. Map 37. Density Units in the Master Plan Area (2001–Present) shows the distribution of density units—defined as dwelling units

per acre—across the master plan area. Certain zoning designations result in denser development patterns.

Most of Bowie's residential areas have a dwelling unit density between 1.1 and 7.9 units per acre. This density corresponds relatively closely to the Residential Low (R-L), Rural Residential (R-R), Residential Suburban (R-S), Residential 55 (R-55), and Residential 80 (R-80) zoning classes common throughout the master plan area. These classes are examined in more detail later.

Map 38. Built Density in Prince George's County (2018)



Persons per Acre



Source: U.S. Census Bureau, 2018 Five-year American Community Survey, Tiger LINE Geographies.

As seen in the Demographic and Economic Profile section, this density is relatively low but similar to the rest of Prince George's County, particularly outside of the I-95/I-495 (Capital Beltway).

Densities within the I-95 and I-495 corridors (within a half-mile) are similar to those found in the City of Bowie. However, the City of Bowie stands out from its vicinity as having a relatively higher dwelling unit density.

Densities within I-495 (Capital Beltway) are relatively uniformly high compared to the master plan area.

Much of the residential development since 2012 in the master plan area has been of very low- and low-density residential housing—under 3.5 dwelling units per acre. This is considerably lower density than seen in Figure 43. Single-Family Detached Residences in the City of Bowie, Zoned Residential 80 (R-80) and

Figure 43. Single-Family Detached Residences in the City of Bowie, Zoned Residential 80 (R-80) and Residential 55 (R-55)



Source: GIS Data Catalogue, Prince George's County Planning Department.

Figure 44. Recent Development in the Residential-Agricultural (R-A) Zone South of US 50 and West of Church Road



Source: GIS Data Catalogue, Prince George's County Planning Department.

Residential 55 (R-55). The majority of this development has occurred in Residential Estate (R-E), Residential Agricultural (R-A), and Residential Low (R-L) zones as well as in one parcel zoned Mixed-Use Transportation-Oriented (M-X-T) (just north of US 50). R-E and R-A zones are both traditional Euclidean single-family detached zones while the R-L and M-X-T zoning classes are Comprehensive Design Zones. This suggests that developers may be relatively agnostic between single-family detached zoning classes in the master plan area. More analysis, including targeted stakeholder interviews, would be required to better understand developer preferences.

The overall development pattern in the master plan area is likely shaped by the desire to develop a limited number of remaining greenfield parcels available for development. Greenfields are sites that may have been used for agriculture, forest, open space, or otherwise left undeveloped in the past, and are now earmarked for development.

Land use trends point to the continued attractiveness of low-density housing in Prince George's County, in particular for middle-class households. This trend poses a challenge to the development of up-market commercial amenities, which require high population densities to maintain financial viability.

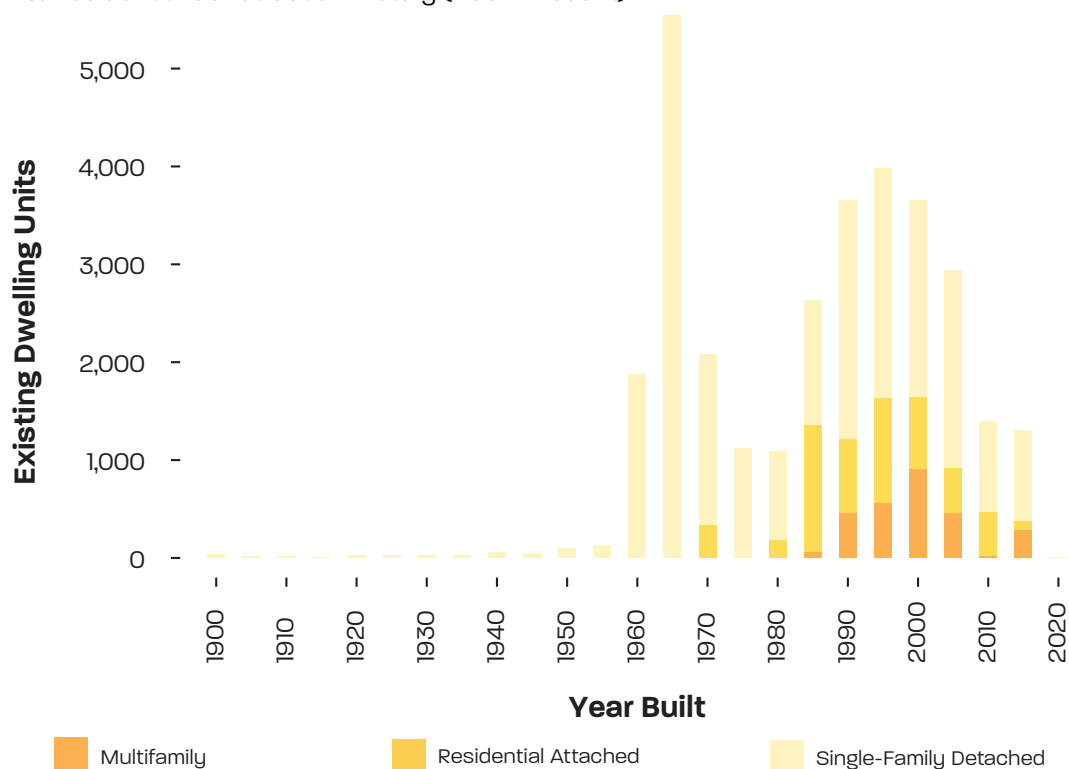
BUILDING AGE

Bowie-Mitchellville and Vicinity has seen two periods of sustained development in its history. The first came in the early 1960s during the post-war suburban building boom, lasting in Bowie through the early 1970s. Development of all uses occurred during this time, with the biggest boom in single-family detached housing, principally in the City of Bowie. Figure 45. Residential Construction History (2001–Present) charts residential development history in the master plan area since 1900. This boom is clearly visible as a large jump in existing dwelling units built (approximately 10,000 units between 1956 and 1974).

A second and more sustained building boom began in the mid-1980s lasting until the Great Recession in 2008. This building boom included both the development of residential housing—including denser attached, townhouse, and multifamily typologies—as well as commercial, office, and industrial uses.

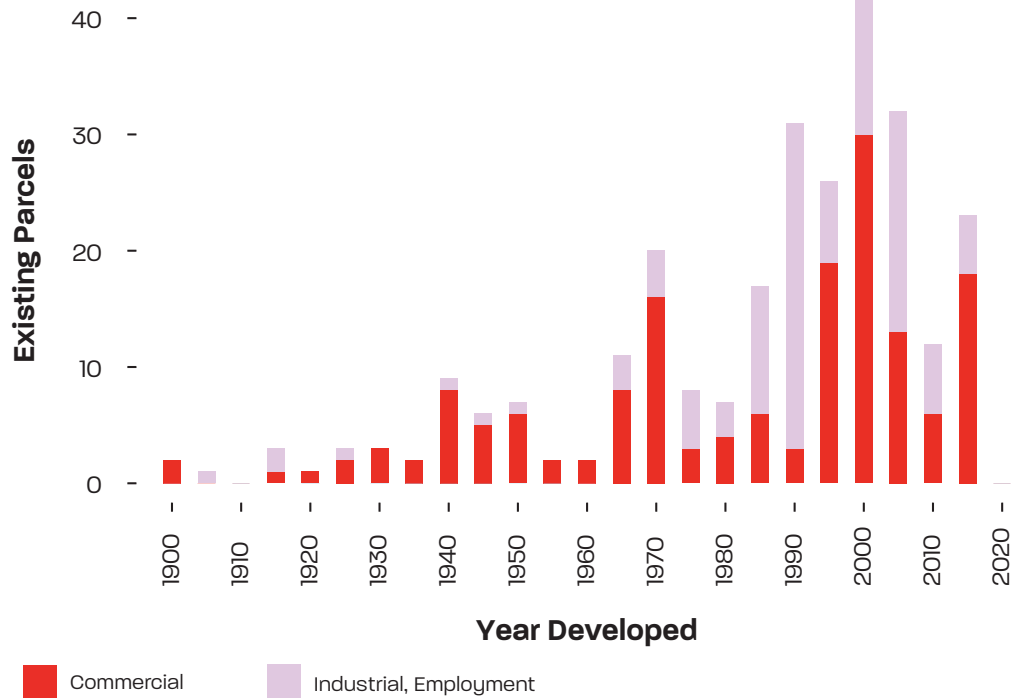
A notable pattern in Bowie-Mitchellville and Vicinity's construction history is that commercial, office, and industrial development in the master plan area has favored large lots since the early 1980s. In terms of total acreage developed, development preceding 1980 appears limited but for outliers in 1970. This trend is

Figure 45. Residential Construction History (2001–Present)



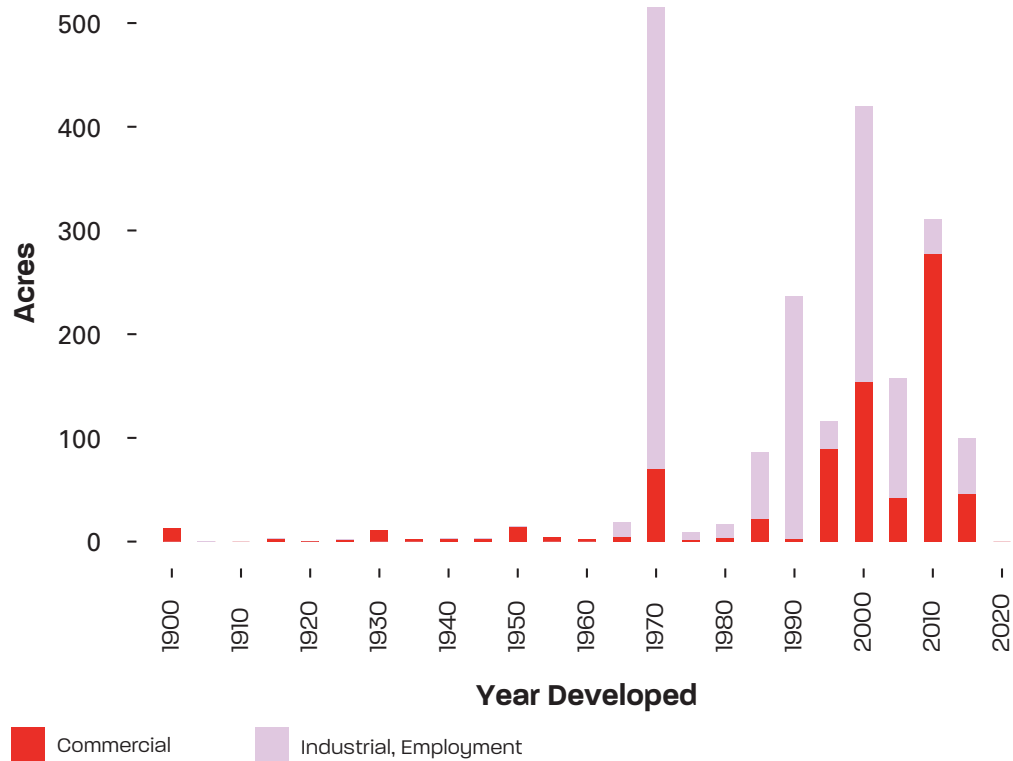
Source: GIS Data Catalogue, Prince George's County Planning Department.

Figure 46. Nonresidential Construction History: Existing Parcel Development Date (1900–2020)



Source: GIS Data Catalogue, Prince George's County Planning Department.

Figure 47. Nonresidential Construction History: Existing Parcel Development Date and Acreage (1900–2020)



Source: GIS Data Catalogue, Prince George's County Planning Department.

illustrated in Figure 46. Nonresidential Construction History: Existing Parcel Development Date and Acreage (1900–2020). An average of about five industrial and commercial parcels per year were developed preceding 1970. Since 1970, there is a noticeable trend toward developing or redeveloping very large parcels zoned for commercial, office, or industrial uses.

Since 1970, about 15 industrial or commercial parcels per year have been developed or redeveloped. This represents a three-fold increase. However, in terms of acreage there was an increase larger by two orders of magnitude. This suggests that not all small parcels of these uses have been attractive for redevelopment. This presents an opportunity for efforts to add commercial amenities or office space to the master plan area to focus on existing large parcels, whether undeveloped or not, and to consolidate parcels into single zoning lots.

OWNERSHIP PATTERN

The majority of the master plan area is privately owned, about 71 percent of the area's total acreage. The remaining 29 percent of the master plan area's acreage is shared between local, state, and federal governments as well as nonprofits, religious institutions, and other nonprivate stakeholders.

Map 39. Nonprivate Land Ownership in the Master Plan Area (2001–Present) illustrates that there is no apparent pattern to the distribution of publicly owned lands throughout the master plan area. All areas in light gray are privately owned.

A number of large publicly owned parcels fall along MD 214, MD 197, and MD 450, as well as in the City of Bowie. These parcels, along with most publicly owned

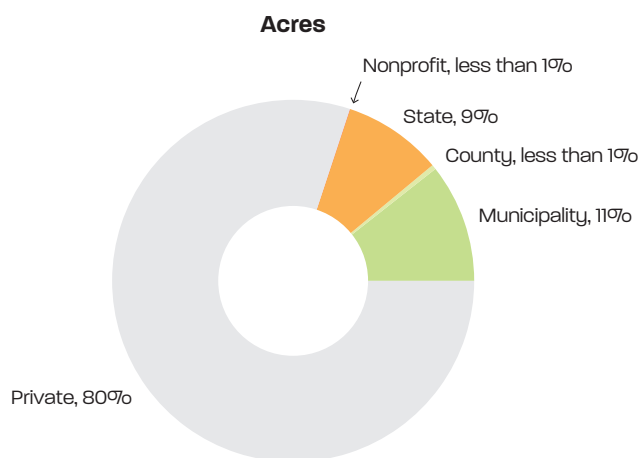
parcels in the master plan area, are used as parks, open space, or institutional uses.

About 10 percent of the acreage of nonprivately owned land in the master plan area is vacant, compared to about 15 percent in the master plan area overall. (See Figure 48. Ownership of Vacant Land in the Master Plan Area [2001–Present]).

The City of Bowie owns about 11 percent of vacant land in the master plan area, making this the largest nonprivate owner type. Most vacant parcels owned by the City of Bowie are small and scattered throughout the master plan area. One large vacant parcel is near the Old Town Bowie focus area.

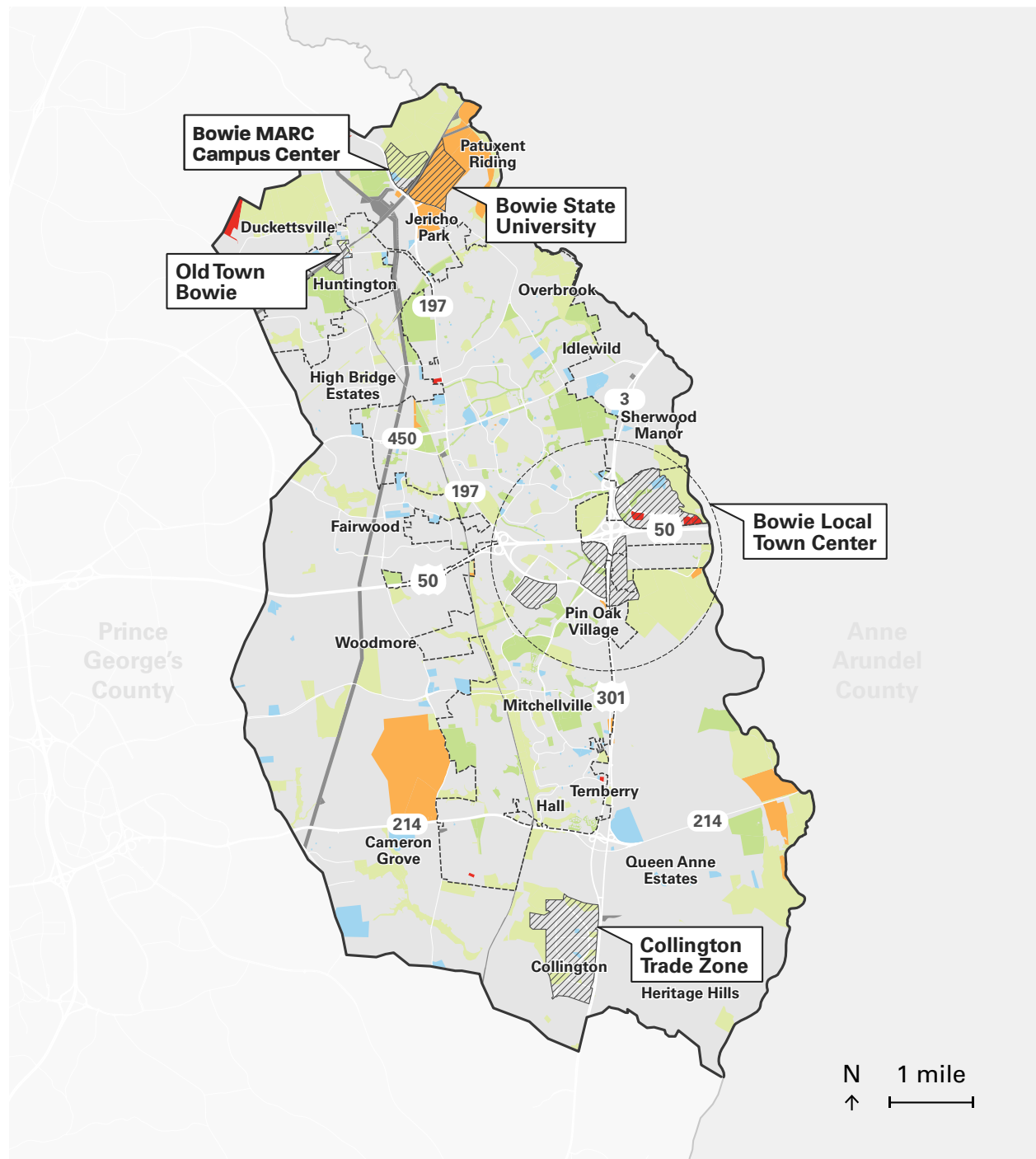
After local municipalities, the State of Maryland is the second largest nonprivate owner of vacant land in the master plan area, representing about eight percent of vacant land overall. Most of this land is adjacent to Bowie State University (BSU), and likely reserved for campus expansion. The state owns one large parcel north of MD 214 near the Six Flags America, bordered by the Belt Woods Natural Environment Area on two sides, itself owned by the Maryland Department of Natural Resources (DNR). The parcel is zoned for Reserved Open Space (R-O-S) though is not developed to accommodate visitors.

Figure 48. Ownership of Vacant Land in the Master Plan Area. (2001–Present)



Source: GIS Data Catalogue, Prince George's County Planning Department.

Map 39. Nonprivate Land Ownership in the Master Plan Area (2001–Present)

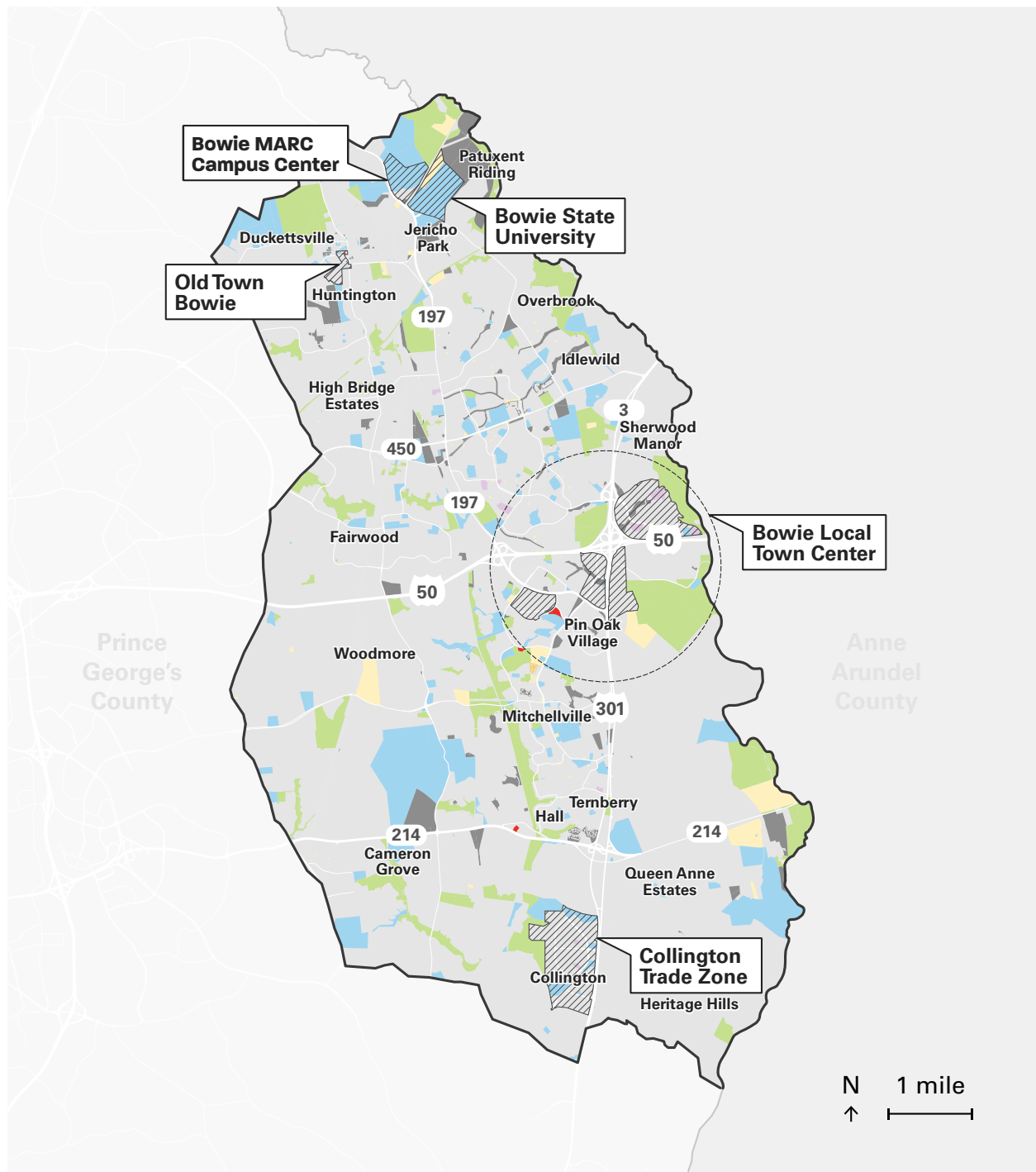


Ownership

 Municipality	 State	 Railroad, Utility, WMATA	 Focus Area
 County	 Federal	 Nonprofit, Church, Other Nonprivate	 City of Bowie

Source: GIS Data Catalogue, Prince George's County Planning Department.

Map 40. Land Use of Nonprivately-Owned Parcels in the Master Plan Area (2001–Present)

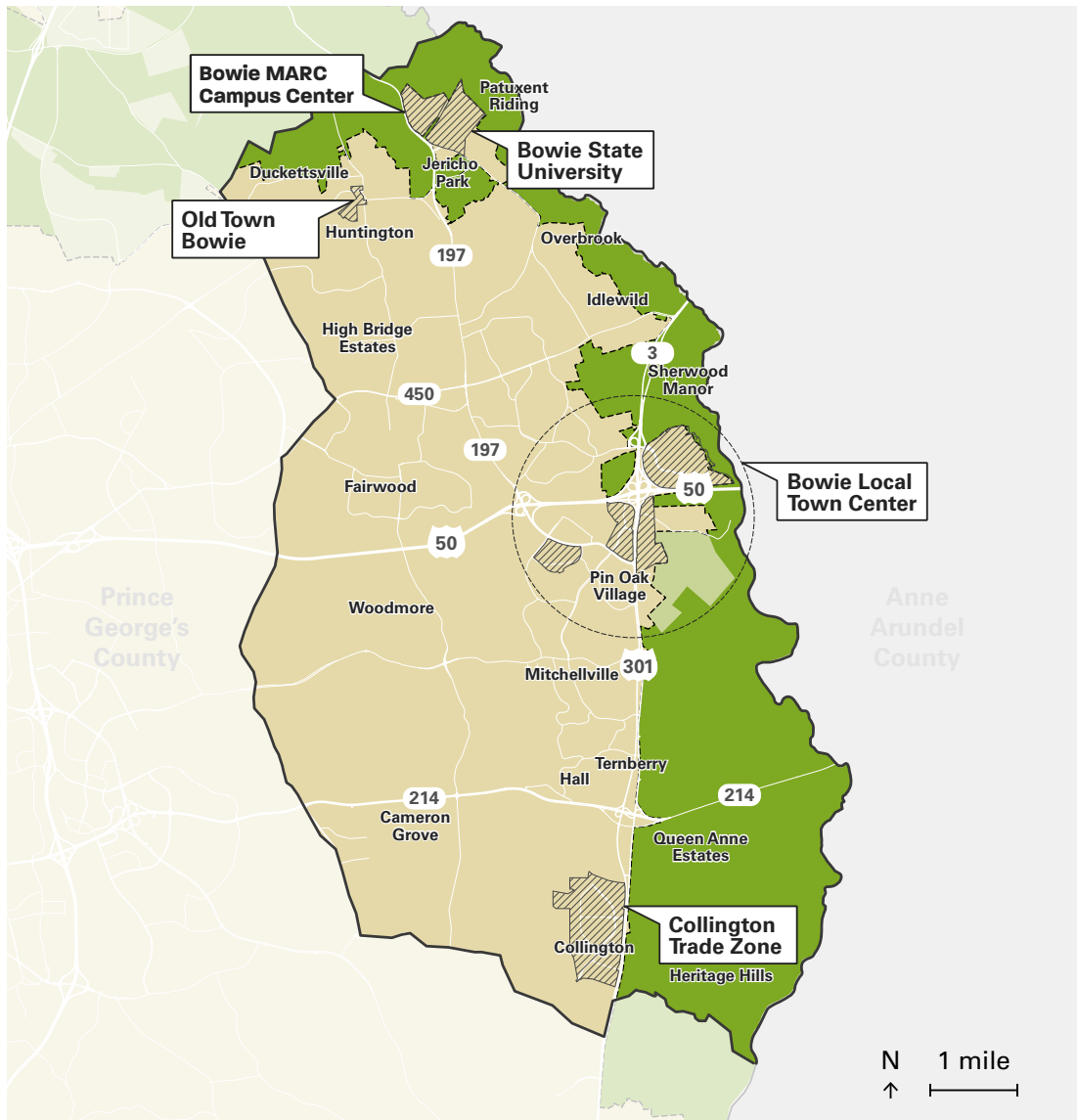


Public Land Use



Source: GIS Data Catalogue, Planning Department of Prince George's County.

Map 41. Growth Management Areas in the Master Plan Area (2001–Present)



Growth and Preservation Areas



Source: GIS Data Catalogue, Prince George's County Planning Department.

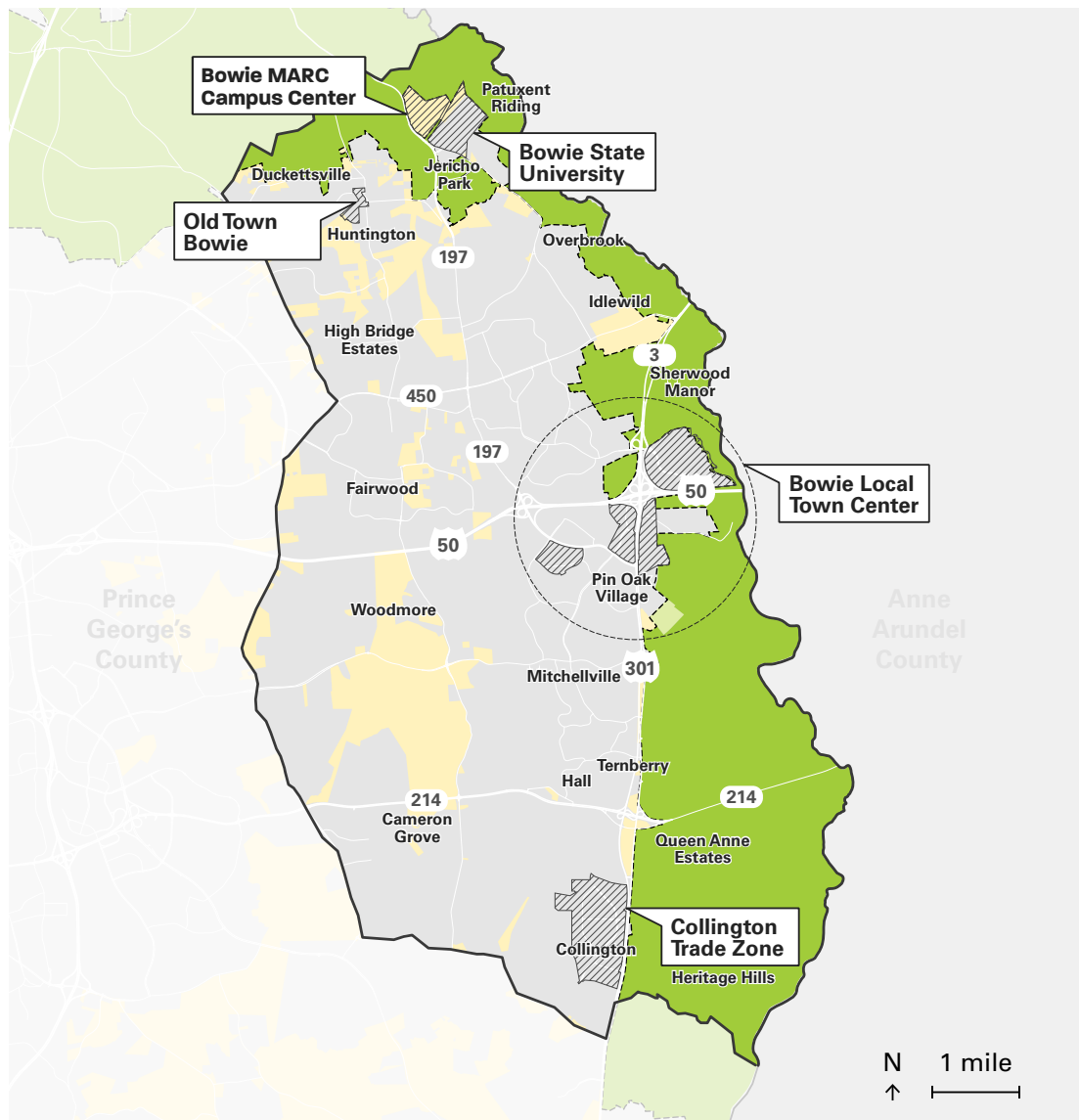
GROWTH MANAGEMENT AREAS

The approval of Plan 2035 established Growth Management Areas a Growth Boundary that delineates delineating areas approved for new development and defines the Rural and Agricultural areas meant for preservation. Plan 2035 also defines the Future Water and Sewer Service Areas where future water and sewer service is allowed, and hence additional development,

and rural and agricultural areas for preservation. (See Map 41. Growth Management Areas in the Master Plan Area [2001–Present]).

The large majority of the master plan area, 69 percent by acreage, is within the Growth Boundary and developable. The Growth Boundary stretches along the eastern side of the master plan area.

Map 42. Sustainable Growth Act (SGA) Tiers Determining Sewer Growth (2014)



SGA Tiers

— Growth Boundary

Tier III

Tier II

Tier IV

▨ Focus Area

Source: GIS Data Catalogue, Prince George's County Planning Department.

SEWER GROWTH

Through the 2012 Sustainable Growth Act, the State of Maryland established four growth tiers based on specified land use characteristics, which may be adopted by counties and other jurisdictions. As defined in the bill, lots in Tier I areas are to be served by public sewerage systems. Tier II areas are currently served or planned to be served by public sewer (except for in the

case of minor subdivisions, which may be served by on-site sewage systems). Tier III and Tier IV are both areas not planned for sewerage service. Tier III may include municipal corporations, rural villages, or areas planned for large lot and rural development. Tier IV areas are planned for protection, preservation, or conservation (e.g., rural legacy, priority preservation areas, etc.).¹

¹ The Sustainable Growth Act of 2012 (Senate Bill 236) can be accessed in full at: <http://mgaleg.maryland.gov/mgawebsite/search/legislation?target=/2012rs/billfile/sb0236.htm>.

Figure 49. Street Network in the City of Bowie



Source: GIS Data Catalogue, Prince George's County Planning Department.

Figure 50. Street Network with Low Connectivity



Source: GIS Data Catalogue, Prince George's County Planning Department.

Map 42. Sustainable Growth Act Tiers Determining Sewer Growth (2014) maps areas planned for sewer service in 2014 after the approval of Plan 2035. Tier II areas are those with sewer service planned or under development, indicated in light yellow on the map. Presently, little residential development has occurred in Tier II areas in Bowie-Mitchellville and Vicinity. Tier III and Tier IV areas, shown in dark and light green on the map, are areas without sewer service or planned sewer service. These areas all fall outside the County Growth Boundary.

NETWORK CONNECTIVITY ANALYSIS

The distance between destinations has implications for how urban a neighborhood may feel and how attractive an area may be for cycling and walking. These are subjective and hard-to-capture aspects of the built form. Nevertheless, it is instructive to examine these measures to gain an understanding of urban form and character in Bowie-Mitchellville and Vicinity.

Network connectivity analysis examines the master plan area using two measures, link-node ratio and betweenness centrality. These measure to what extent a network, a road network in this case, may increase distances between locations.²

Map 43. Link-Node Ratio in Bowie-Mitchellville and Vicinity maps link-node ratio in the master plan area, defined as the number of links (road segments between intersections) and nodes (intersections). A perfect grid has a link-node ratio of 2.5. Suburban areas with culs-de-sac and other dead-ends will have lower link-node ratios, typically between 1.0 and 1.5.

The link-node ratio is uniformly high in the City of Bowie, particularly in the historic Levittown, relative to other parts of the master plan area. Link-node ratios in the City of Bowie range between 1.5 and 2.3 in most areas.

While the street network in the City of Bowie has many attributes of traditionally suburban street design—gentle curves, for example—most streets are connected to the network at their beginning and end. Abstracted, the street network is relatively grid-like.

By contrast, street networks in suburban subdivisions recently constructed in the master plan area have less well-connected layouts, as seen in Figure 50. Street Network with Low Connectivity.

Another measure of network connectivity is called betweenness centrality, which measures the share of shortest paths that are routed through every road. The total number of shortest paths is calculated for every pair of intersections in the master plan area plus a small buffer around it. As such, betweenness centrality measures how important a road network is to the local network, rather than the regional network.³

This analysis highlights the role of US 301/MD 3 (Crain Highway), Church Road, and MD 214 as major corridors in the master plan area.

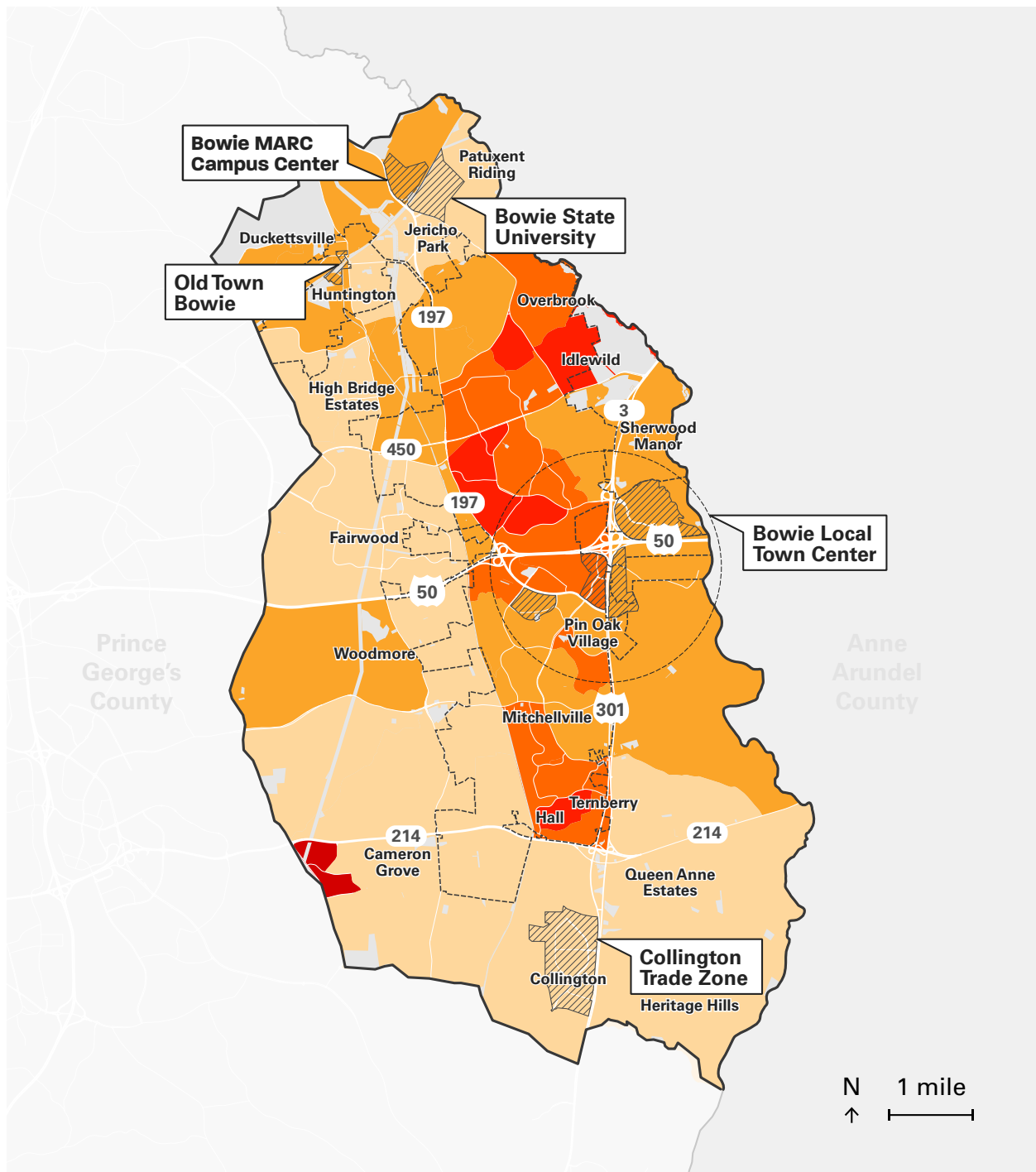
Mount Oak Road and Mitchellville Road are also important to the local road network, connecting homes in the Church Road corridor and City of Bowie south of I-50 to the Bowie Local Town Center.

One notable observation is that the Old Town Bowie and BSU focus areas are poorly connected to the local road network. Though they are relatively close to populous parts of the master plan area, they may be considered out of the way for some, in comparison to Bowie Local Town Center. This suggests that while these focus areas may represent opportunities for commercial and residential development, they may be less attractive to the market than commercial and retail offerings in the Bowie Local Town Center focus area.

² Dill, Jennifer. "Measuring Network Connectivity for Bicycling and Walking." Transportation Research Board 2004 Annual Meeting.

³ This assumption leads to some challenges such as favoring road segments that traverse more of the master plan area, thereby understating the importance of some roads. An example is US 50, a major corridor that very directly bisects the master plan area. However, US 50 has very few direct connections to the local network in the master plan area.

Map 43. Link-Node Ratio in Bowie-Mitchellville and Vicinity

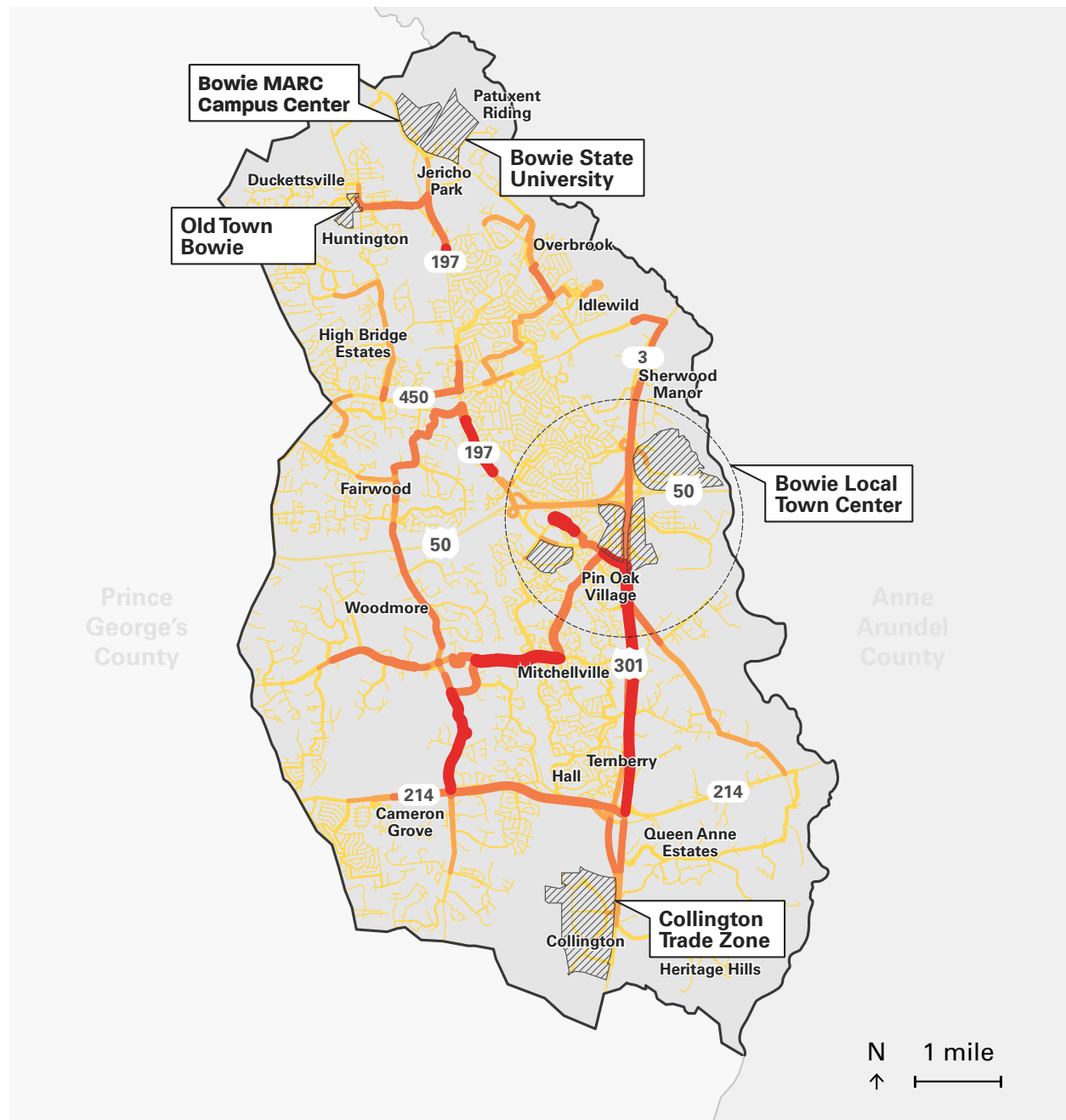


Link-Node Ratio—Number of Road Segments Over Number of Intersections



Source: Open Street Map; GIS Data Catalogue, Prince George's County Planning Department.

Map 44. Network Connectivity in Bowie-Mitchellville and Vicinity Measured by Betweenness Centrality



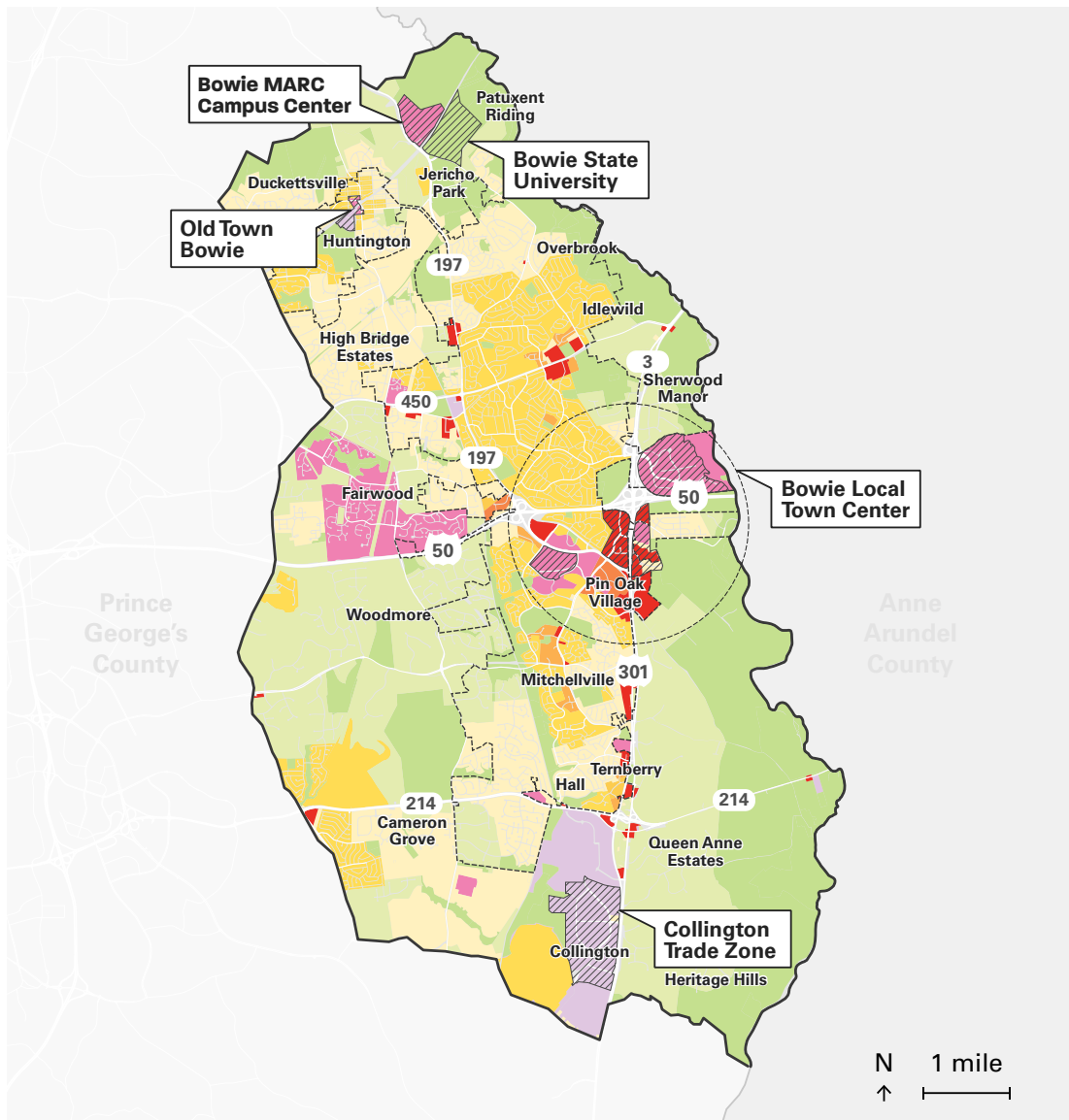
Betweenness Centrality—Share of Shortest Paths Passing Through Each Road



Note: Betweenness centrality measures the share of shortest paths that are routed through every road. The total number of shortest paths is calculated for every pair of intersections in the master plan area plus a small buffer around it thus measuring how important a road network is to the local network, rather than the regional network.

Source: Open Street Map; GIS Data Catalogue, Prince George's County Planning Department.

Map 45. Master Plan Area Existing Zoning (New Zoning Ordinance Pending)



Zoning Class

Commercial Zones (C-A, C-M, C-O, C-S-C)	Mixed-Use / Community Planning Zones (M-U-I, M-X-C, M-X-T) and Activity Centers (L-A-C, M-A-C)	Residential Medium (R-18, R-30C, R-M, R-T)	Residential Very Low (R-A, R-E)
Industrial Zones (I-1, I-4) and Employment Areas (E-I-A)	Residential High (R-U)	Suburban (R-55, R-80, R-S)	Parks and Open Space (O-S, R-O-S)
	Residential Low (R-L, R-R)		Focus Area
			City of Bowie

Source: GIS Data Catalogue, Prince George's County Planning Department.

Zoning

The Land Use and Urban Form section examined the current built form in the master plan area. This section examines the zoning policy underlying these forms and what policies have been successful in encouraging the kinds of medium- to high-density mixed-use development recommended by Plan 2035.

ZONING MAP

Map 45. Master Plan Area Existing Zoning (New Zoning Ordinance Pending) maps parcel zoning classes in the master plan area. The large majority of the master plan area is zoned for low-density suburban development or open space.

Figure 51. Zoning Classes in the Bowie-Mitchellville and Vicinity Master Plan Area*

Class	Class Name	Subclass	Type	Max DU*	Units	Acres	Est DU*	Underbuilt*
ROS	Reserved Open Space		R	0.05				
RA	Residential Agricultural		R	0.50	1,395	5,350	0.26	0.24
RE	Residential Estate		R	1.08	1,566	2,208	0.71	0.37
RL	Residential Low Development	Low 0.5	CD	0.90	2,008	920	2.18	-1.28
RL	Residential Low Development	Low 1.0	CD	1.50	2,008	920	2.18	-0.68
RR	Rural Residential		R	2.17	8,164	3,888	2.10	0.07
RS	Residential Suburban Development	Suburban 1.6	CD	2.60	1,902	1,304	1.46	1.14
RS	Residential Suburban Development	Suburban 2.7	CD	3.50	1,902	1,304	1.46	2.04
R80	One-Family Detached Residential		R	4.50	5,999	1,804	3.33	1.17
R55	One-Family Detached Residential		R	6.70	3,608	1,045	3.45	3.25
RM	Residential Medium Development	Medium 3.6	CD	5.70	240	39	6.15	-0.45
RM	Residential Medium Development	Medium 5.8	CD	7.90	240	39	6.15	1.75
RT	Townhouse	Three-family dwellings	R	9.00	1,342	146	9.19	-0.19
RT	Townhouse	Two-family dwellings	R	8.00	1,342	146	9.19	-1.19
RT	Townhouse	Other attached dwellings	R	6.00	1,342	146	9.19	-3.19
R30C	Multifamily Low Density Condominium	Garden apartment	R	12.00	60	10	6.00	6.00
R30C	Multifamily Low Density Condominium	Three-family dwellings	R	9.00	60	10	6.00	3.00
R30C	Multifamily Low Density Condominium	Two-family dwellings	R	8.00	60	10	6.00	2.00
R30C	Multifamily Low Density Condominium	Other attached dwellings	R	6.00	60	10	6.00	0.00
R18	Multifamily Medium Density Residential	Garden apartment	R	12.00	320	22	14.55	-2.55
R18	Multifamily Medium Density Residential	Mid-rise apartment	R	20.00	320	22	14.55	5.45
R18	Multifamily Medium Density Residential	Three-family dwellings	R	9.00	320	22	14.55	-5.55
R18	Multifamily Medium Density Residential	Two-family dwellings	R	8.00	320	22	14.55	-6.55
R18	Multifamily Medium Density Residential	Other attached dwellings	R	6.00	320	22	14.55	-8.55
RU	Residential Urban Development	Urban 8.0	CD	11.90	1,309	117	11.19	0.71
RU	Residential Urban Development	Urban 12.0	CD	16.90	1,309	117	11.19	5.71

Class	Class Name	Subclass	Type	Max DU*	Units	Acres	Est DU*	Underbuilt*
LAC	Local Activity Center	Neighborhood	CD	12.10	498	52	9.58	2.52
LAC	Local Activity Center	Village	CD	15.00	498	52	9.58	5.42
LAC	Local Activity Center	Community	CD	20.00	498	52	9.58	10.42
MAC	Major Activity Center	Metro center	CD	125.00	1,285	101	12.72	112.28
MAC	Major Activity Center	New town	CD	47.90	1,285	101	12.72	35.18
MUI	Mixed Use Infill		MX	NA	4	2.3	1.74	NA
MXC	Mixed-Use Community		MX	2.00	1,551	639	2.43	-0.43
MXT	Mixed-Use Transportation-Oriented	No options	MX	NA	484	224	2.16	NA
MXT	Mixed-Use Transportation-Oriented	With options	MX	NA	484	224	2.16	NA

*Many of the zoning classes in the master plan area have subclasses allowing for varying density levels. These are indicated by the "Subclass" column. "DU" is an acronym for "Density Units" (dwelling units per square acre). "Est" is an abbreviation of "estimated." Estimated density units and underbuilt density units are calculated for the zoning class overall and not the zoning subclass, which is why figures repeat in these columns and in the "Units" and "Acres" columns. "Underbuilt" is defined as the difference between the total land allowable or zoned for a given type of development, minus the total land area already built of that type. In this case, the figure represents the total density of units over- or underbuilt. Given the existing zoning dataset provided by M-NCPPC, it is not possible to differentiate between zoning subclasses. Retirement zoning subclasses are not indicated in this table to reduce clutter. A guide to zoning classes in Prince George's County can be found at <http://www.mncppc.org/DocumentCenter/View/1366/Guide-to-Zoning-Categories-PDF>.

Source: GIS Data Catalogue, Prince George's County Planning Department.

CURRENT ZONING VERSUS LAND USE

Figure 52 examines the current land uses of parcels in the master plan area by their primary zoning class. Some parcels overlap between multiple zoning classes. Here, parcels are grouped by the zoning class representing the largest percent of their acreage. Generally, this value is 100 percent or slightly less but for a few exceptions. This analysis ignores these exceptions, as it is only meant to give an indication of how current zoning impacts land use. This graphic should be read for the main patterns it displays, rather than smaller patterns that may simply be the result of noise in the data.

Finally, some zoning classes are only used for a small number of parcels. The total acreage by land use for each zoning class is displayed in Figure 53 examines the share of acreage by land use and zoning class.

A first pattern that emerges when considering land use and zoning in Bowie-Mitchellville and Vicinity is that lower density residential zoning classes tend to overlap significantly with other uses, especially open space and transportation/utilities/other uses. Further, lower density residential zoning classes have a higher chance of being partly vacant. These zoning classes are R-L, R-R, R-A, and R-E.

By contrast, denser residential zoning classes—R-U, R-M, R-T, R-30C, R-18, R-S, R-80, and R-55—have

comparatively uniform land uses. This is in part because these parcels tend to be smaller and contain zoning lots neatly targeting specific parcels rather than larger areas.

Of the mixed-use and community planning zones present in the master plan area—Major Activity Center (M-A-C), Local Activity Center (L-A-C), Mixed-Use Infill (M-U-I), Mixed-Use Transportation-Oriented (M-X-T), and Mixed-Use Community (M-X-C)—M-A-C and L-A-C are most likely to produce what appear to be genuinely mixed uses.

One significant M-X-C parcel is currently under development—Fairwood. The M-X-C Zone was created specifically for this development. It is the only M-X-C zone in the County. The zone was intended to create a master-planned, low-density suburban housing development with community-serving retail and public facilities. As of the time this data was last updated, no commercial or retail facilities have been constructed as shown in the figures above. Once built, the zone will reflect the mix of uses planned for the parcel.

Commercial Miscellaneous (C-M), the primary zoning class of commercial parcels in the Bowie Local Town Center focus area, as well as C-S-C, a common commercial zoning class in the master plan area, appear successful in attracting commercial uses.

ZONING MAP AMENDMENTS

Map 46. Zoning Map Amendments in the Master Plan Area maps zoning map amendments made by the Prince George's County District Council in the master plan area since 2002. To make an amendment to the zoning map, the District Council must determine that there has either been a substantial change in the character of the neighborhood proposed for rezoning or that a mistake was made either in the original zoning or the most recent sectional map amendment. There have been eleven zoning map amendments in the master plan area. The most recent was in 2020, and the oldest shown was in 2007.

Of the eleven zoning map amendments in the master plan area during this period, only four have detailed information available through the Prince George's County District Council legislation search portal.⁴ These are A-10029 (3/2014), A-10031(9/2014), A-9968 (5/2019), and A-9975 (5/2019).

The zoning map amendment A-10029 was made to rezone a Rural Residential (R-R) zone to a Commercial Miscellaneous (C-M) zone, which allows for various commercial uses including office and highway-oriented uses. This parcel, about 7.8 acres large, now hosts various commercial businesses including a laser tag facility, Stanley Steemer, outlet store, and a samosas business.

Figure 52. Parcel Land Use by Zoning Class



Note: This graphic should be read for the main patterns it displays, rather than smaller patterns that may simply be the result of noise in the data.

Source: GIS Data Catalogue, Prince George's County Planning Department.

⁴ See "Legislative/Zoning Items" on the Legislative Branch of Prince George's County website: <https://princegeorgescountymd.legistar.com/Legislation.aspx>.

The zoning map amendment A-10031 was made to rezone 19 acres of land from the C-S-C to the M-X-T Zone. As of the latest satellite imagery available, the site has not yet been developed.

The zoning map amendment A-9968 was made to amend the basic plan for Willowbrook to increase the number of dwelling units, to increase the percentage of single-family attached dwelling units, to change the size and location of dwelling units, and to revise conditions and considerations of basic plan approval.

The zoning map amendment A-9975, made in 2019, was made to amend the Basic Plan for Locust Hill to increase the proportion of attached dwelling units to add conventional townhouses, to revise the layout, and to revise conditions of approval.

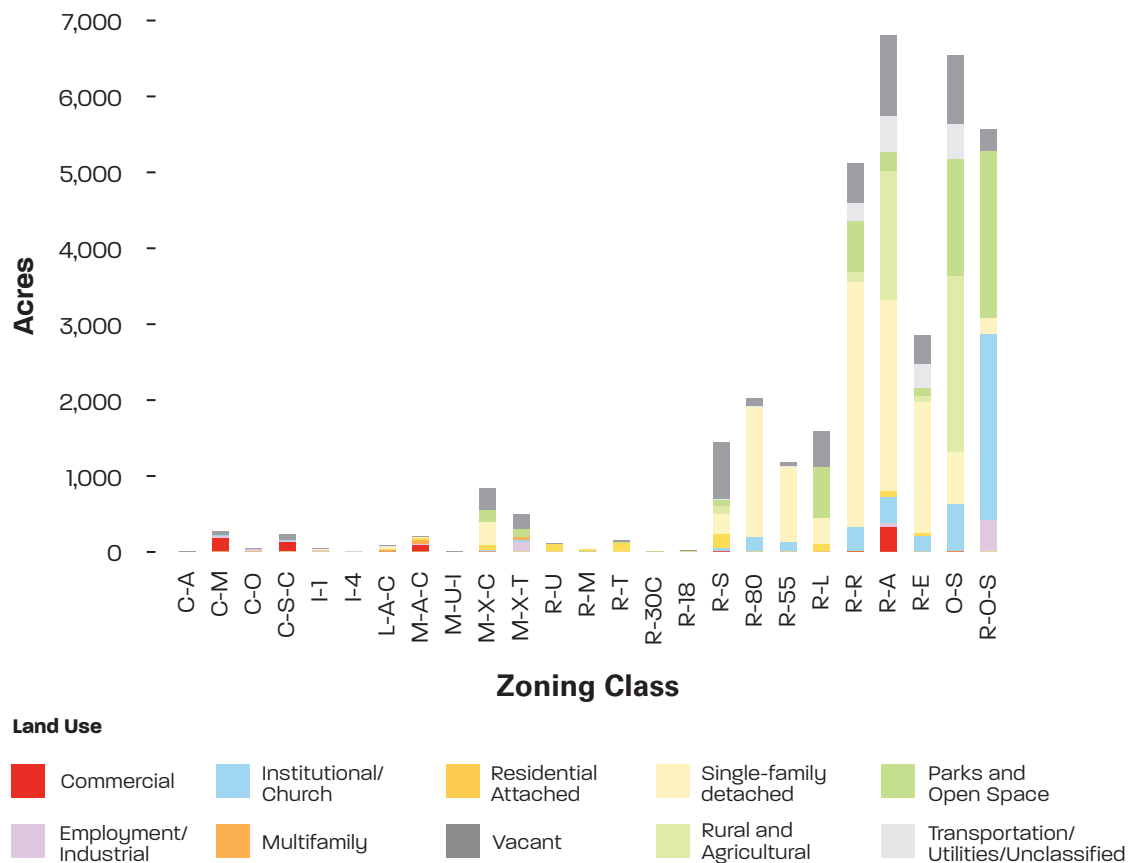
Discussion of Challenges and Opportunities

As stated in the overview of this section, there exists an opportunity in the master plan area to accommodate new growth while allowing existing residents to comfortably age in place. This section examined what growth has occurred in the master plan area and where opportunity sites for development remain.

GREENFIELD DEVELOPMENT AND INFILL

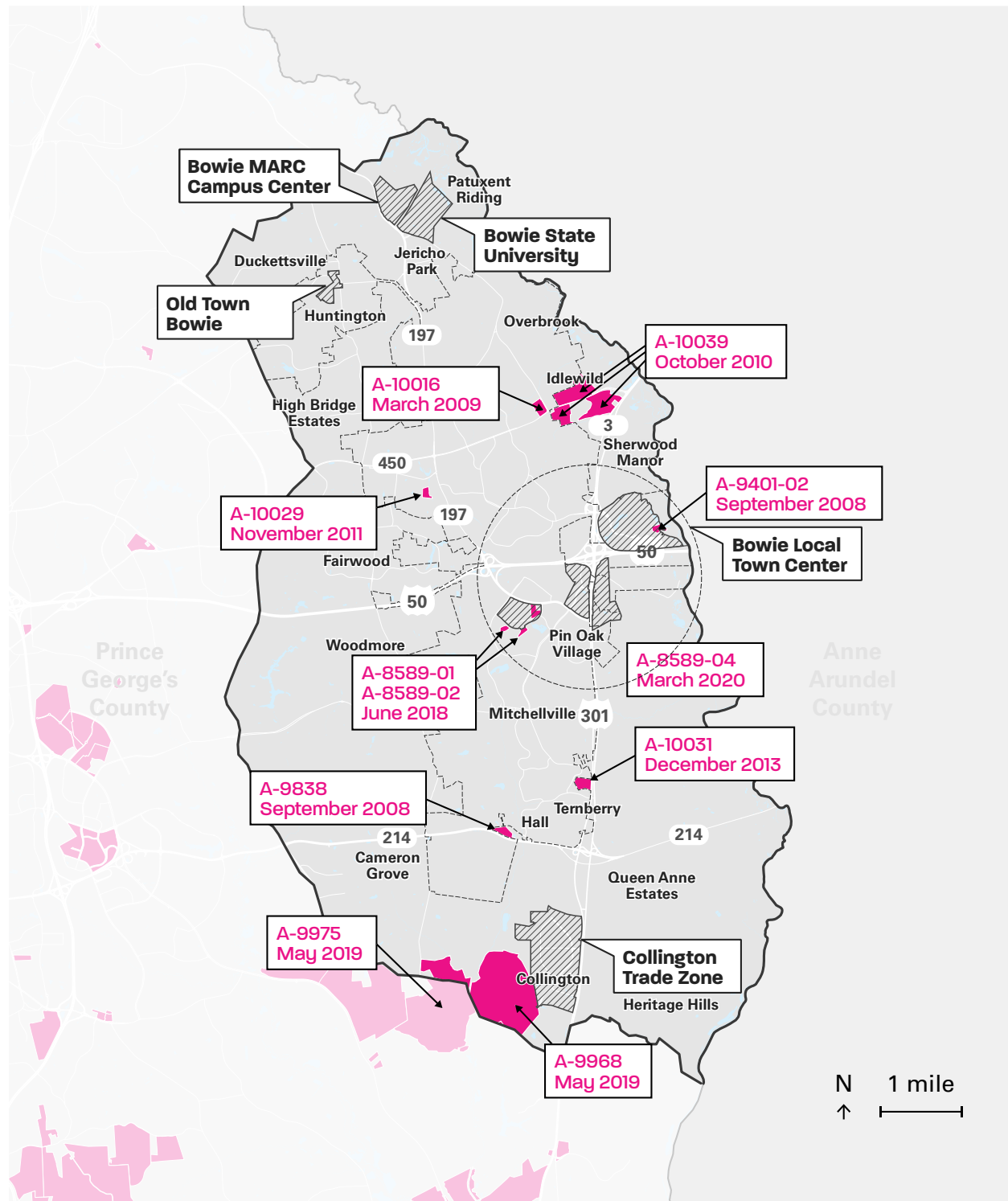
The land use, zoning, and built form in Bowie-Mitchellville and Vicinity is reflective of the priority placed on preserving existing communities within the master plan area. Since the introduction of Levittown to the master plan area in the 1950s, residential development has occurred principally on greenfield sites, with little infill development except of commercial sites. With the exception of a few large parcels, the master plan area is now built-out to the extent of the current zoning code.

Figure 53. Parcel Land Use by Zoning Class (Total Acres)



Source: GIS Data Catalogue, Prince George's County Planning Department.

Map 46. Zoning Map Amendments in the Master Plan Area



Zoning Map Amendments

- Zoning Map Amendments
- Focus Area

Source: GIS Data Catalogue, Prince George's County Planning Department.

There exists an opportunity in the master plan area to accommodate new growth while allowing existing residents to comfortably age in place.

AUTO-CENTRICITY AND RESIDENTIAL DENSITY

A low density urban form, such as that seen in the master plan area, perpetuates car dependency. A lack of public transit access further aggregates this problem; while the master plan area is relatively close to Washington, D.C., the major jobs center in the region, it has few frequent transit options connecting residents to those jobs. In general, a personal vehicle is required for master plan area residents to live comfortably and access jobs. Some form of residential density may be suitable in certain focus areas, such as the Bowie Local Town Center and Bowie State MARC Station.

Other pockets, such as the Colington trade zone and Old Town Bowie, provide future avenues for densification.

Without increased transit connectivity, walkability, and other efforts to reduce auto-dependence, there is little rationale and few remaining opportunities to add residential density to the master plan area at a large scale. Adding significant residential density could conflict with the preservation goals set forth by Plan 2035 and disrupt existing communities. Regulatory tools such as zoning present an opportunity to develop more dense and transit-connected centers in Bowie-Mitchellville and Vicinity. However these tools may not be sufficient in creating the diverse places needed in the master plan area. Land use and zoning changes need to account for market realities, and strategically position land to allow for pockets of densification

MULTIFAMILY HOUSING

Multifamily housing makes up a very small portion of current land use in Bowie-Mitchellville and Vicinity. There are opportunities to add higher density multifamily housing in key areas, provide the infrastructure for aging residents to downscale and age in place, and also address the housing needs and preferences of many millennials. Further, there exists the opportunity to redevelop existing, underperforming commercial and retail areas, making them more vibrant and attractive to residents. In the master plan area, Bowie Local Town Center provides multiple opportunities to create pockets of mixed-use neighborhoods. The local town center is more accessible and well connected than other focus areas (as seen in the betweenness centrality analysis in this section) and is in close proximity to important public amenities.

Accomplishing this will require the right zoning approach. In the master plan area, comprehensive design zones have provided the County with the ability to carefully control the built character, amenities, and density of certain areas.