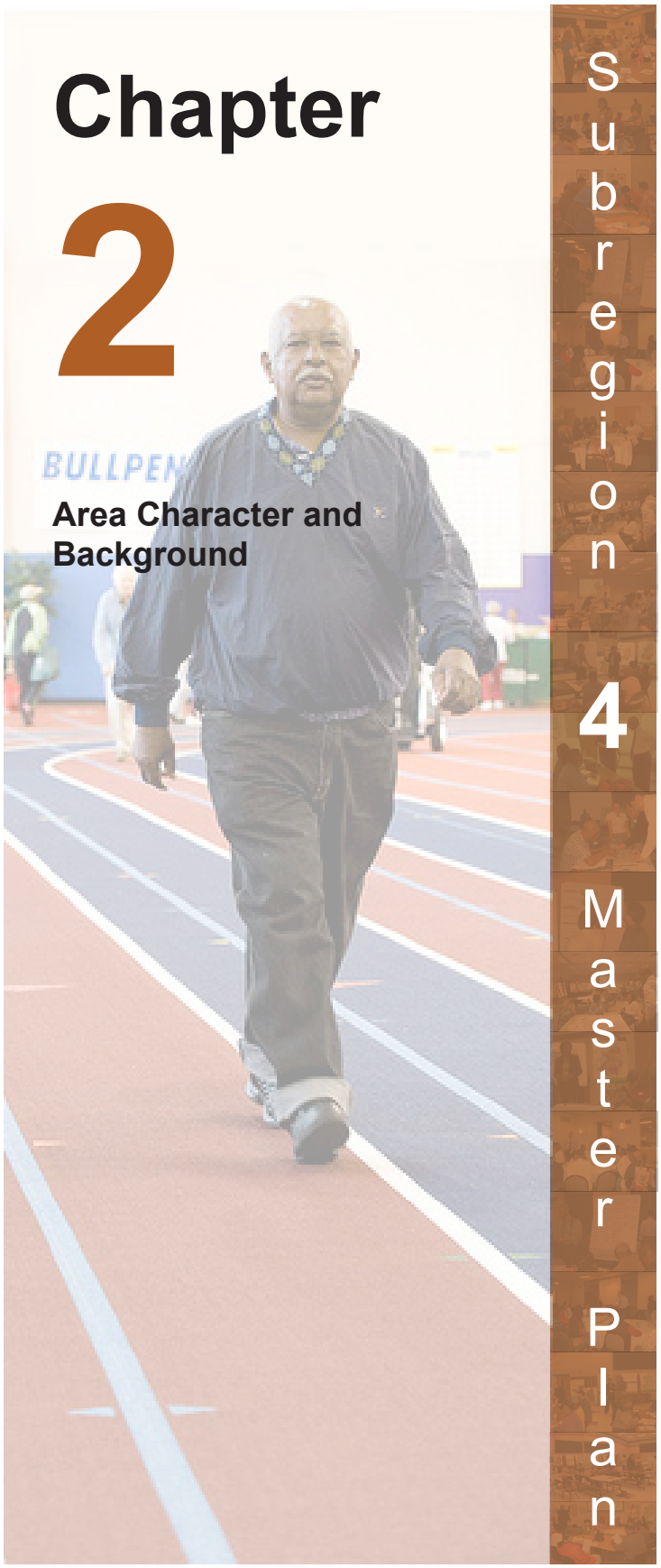
Chapter 2

Area Character and Background



Subregion 4 Master Plan

History of Area

The early history of Subregion 4 is intricately woven into the colorful past of Colonial Maryland and Prince George's County. Before Colonial settlement, the area was part of the Piscataway Indian Nation. The first Colonial settlement in Subregion 4 occurred in the mid-seventeenth century, when large land grants were being developed into plantations and manors in Prince George's County. Some of the oldest land patents of the Colonial era straddled what is now the dividing line between Subregion 4 and the District of Columbia. Large estates representing land claims originating in the 1670s and 1680s lay along Oxon Run, bearing the names Green's Delight, Good Luck, and Nonesuch. Among the first names to appear in historical records are those of Colonel Ninian Beall and John Addison.

It is reasonable to assume that, at one time, the great bulk of the northern half of Subregion 4 was owned by the Bealls and the Berrys, with the Addisons, Sheriffs, Stodder's, and other prominent Prince Georgians also having sizable holdings within the area and nearby. Some namesake links to these old families, such as Addison Road and Sheriff Road, still remain.

Tobacco and other agricultural products were the main industries during the 18th and 19th centuries. These products were exported from area farms owned by settlers such as the Bowie and Berry families. During the 1800s, movement of people and commodities took place on a very limited, unsurfaced road system connected to the path of the old Washington–Marlboro Turnpike (now known as Marlboro Pike), which linked the county seat at Upper Marlboro to Washington, D.C. Designated stopping points were at Walker Mill Road, which led to Charles Walker's mill on Southwest Branch, Old Silver Hill Road connecting to another stage coach route along what is presently known as Branch Avenue, and at Long Old Fields where it intersected a north/south road on the present Forestville–Ritchie Road alignment. The present-day Central Avenue began at Addison Road and ran eastward only.

One of the first land divisions, entitled Jackson's subdivision, occurred in 1873 in the central part of Subregion 4. A proposed toll road through the tract was not built, but later became the section of Central Avenue west of Addison Road.

Although the subdivision of land was practiced all through the 19th century, Subregion 4 was still in rural farmland and estates at the beginning of the 20th century. The suburbanization of the area began around the turn of the century, when subdividers and real estate agents started platting the older section in small, 25-by-100-foot lots. Skilled and semiskilled laborers from the congested neighborhoods of the District of Columbia were the first to settle in the newly subdivided areas of Capitol Heights, Highland Park, Carmody Hills, and Seat Pleasant in 1904. Fairmount Heights, which was subdivided in 1900, has the distinction of being the first black community settled in Prince George's County and was incorporated in 1935. Property in Cedar Heights started changing hands in the early 1900s, when Senator Dodge of Ohio—who owned most of the land—began selling small parcels. In 1910, blacks also started to move into the Glenarden subdivision.

The opening of the railroad lines and electric streetcars at about the same time contributed substantially to the growth and development of the area. Seat Pleasant became the terminal, not only for a number of the streetcar lines, but also for the Washington Rapid Transit Company and the Washington and Chesapeake Beach Railway Company. Many of the early residents rode these lines to get to their jobs elsewhere in the metropolitan area. The Chesapeake Beach Railroad was incorporated in 1896 to carry vacationers from the Washington D.C., area to the new resort at Chesapeake Beach. The new line traveled the subregion from Seat Pleasant east to stops near the Brooks and Ritchie properties. The Washington-Baltimore-Annapolis Electric Railway Company began operations about 1900 and ceased operating in 1935. This railway followed the present route of the George Palmer Highway, MD 704.

In the 1930s, the communities in Subregion 4 grew slowly, remaining principally rural in nature, with rolling hills and open space. With the large increase in the number of government jobs during the New Deal era, blacks from other parts of Maryland and from the South began moving into the Washington area. Families that could afford to own inexpensive properties moved in increasing number into the area. Capitol Heights, Bradbury Heights,Deanwood Park, Beaver Heights, Jefferson Heights, and Columbia Park were developed at that time.

During the 1940s, this area experienced its first large-scale in-migration. Population increased as a result of the new military and

other government jobs in the Washington area during World War II and the subsequent waves of veterans returning home and seeking housing and employment in the Washington region.

In the early 1940s, the West Brothers Brick Company moved its operation into the area. This stimulated additional industrial development and created jobs, attracting more residents.

In the 1950s, the area experienced its greatest growth rate. It was during the 1950s that Palmer Park, Columbia Park, Booker T Homes, and Highland Gardens were developed within the northern half of Subregion 4, adding to the population and increasing the overall residential density of the area. Most of the new housing development constructed during these years was in garden-type apartments; there was also an unprecedented demand for suburban single-family housing. Major federal installations were built in the area, including the Census Bureau complex in Suitland and the nearby Andrews Air Force Base. Suitland Parkway was built, and sewer and water lines were extended throughout the area. Many neighborhoods grew rapidly. District Heights was completed, designed with a modern street pattern of curvilinear streets complete with curbs, gutters, street lighting, and some sidewalks.

Townhouses appeared in the 1960s for the first time. However the focus of the 1960s was on the development of new apartment complexes, mainly along the new Pennsylvania Avenue extension, Marlboro Pike, and Suitland Parkway.

Subregion 4 Today

Background

The Subregion 4 Master Plan area, comprising approximately 18,624 square acres, is distinguished by the varied nature of the land development.

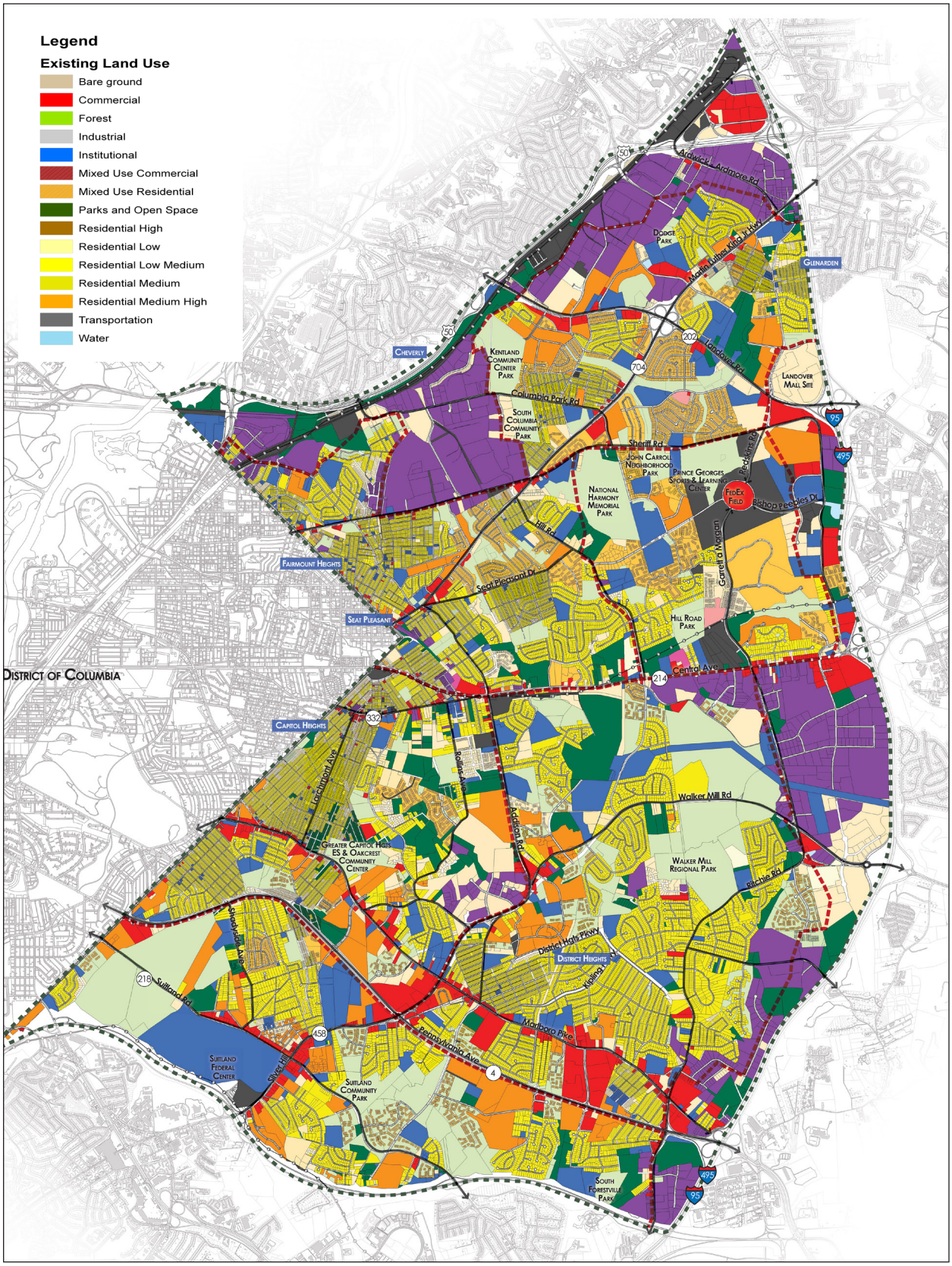
In the 2000 census, there were 131,614 residents in Subregion 4. In 2008, it is estimated that the population has grown to 132,695. The subregion includes first ring suburb communities and new sprawling single-family neighborhoods. It is the home of seven Metrorail stations and regional attractions such as FedEx Field, the Prince George's County Sports and Learning Center and the Prince George's Ballroom. There are older strip commercial centers in addition to the regional mall located along Marlboro Pike that has shown signs of revitalization. The industrial market is strong, characterized by the variety of intensity of use and types of services offered in the area, providing an important economic base for the subregion and the county.

Finding a balance between the suburban and urban characters of the subregion while capitalizing on its greatest strengths—proximity and access to Washington, D.C., and the region and the seven transit stations—will be critical to the implementation of the vision of the Subregion 4 Master Plan.

Economic Development

The economic development opportunities and strengths identified for Subregion 4 focus on the potential to enable (re)investment that will benefit local residents and the entire Prince George's County economy. The main opportunities and strengths of the subregion are:

- Close proximity to various employment, entertainment, historic, and recreational amenities found in Washington, D.C., northern Virginia, and central Maryland that make its location ideal for continued economic growth.
- Federal employment and potential recruitment due to its proximity to Washington, D.C.
- The attraction of new retailers into Subregion 4 to increase the variety and quality of goods offered locally.
- Residential affordability.



Map 2-1
Existing Land Use

Some of the most prominent issues and threats that the area faces and needs to overcome in order to capitalize on the many opportunities include:

- The lack of high-quality, good-paying employment opportunities.
- Limited retail and service options in both the variety of offerings and the level of quality of goods within a particular category (e.g., dining venues).
- The perceived ineffective public outreach and communication methods of sharing the progress of new developments to residents of the subregion.
- Lower educational levels of Subregion 4 residents in comparison to the rest of the county.
- Real and perceived criminal activity.
- The area's image due to high levels of industrial uses that may prevent other quality business from selecting a site in the area.
- A high rate of foreclosures.

Land Use

The six living areas that comprise Subregion 4 are primarily residential and are served by smaller retail/commercial uses scattered throughout the area, such as hubs and strip malls along corridors including Marlboro Pike, Central Avenue, and Martin Luther King, Jr. Highway, and by larger commercial mall developments adjacent to the subregion. The living areas are surrounded by industrial uses, business parks, and flex space to the north and east. Each living area possesses unique characteristics and distinct identities, yet the entire subregion can be classified as suburban/urban in nature. Although many places within the area offer opportunities for pedestrian connectivity and access to an operating bus system, the main form of transportation remains the automobile. Single-family homes are the most common housing option in the area, followed by a high number of multifamily apartments and a small number of townhomes, which are most prominent in recent developments. The subregion currently lacks vertical integration of uses, such as a mix of employment and residential, which reinforces the suburban character of the area. A concentration of higher density areas, located adjacent to Metro stations, would help capitalize on the existing transit system network. The juxtaposition of the proximity of the area to Washington, D.C., and the surrounding expansive highway system, previous planning efforts, identified centers, and well-established residential zones provide a catalyst for future growth.

Housing and Neighborhoods

Over time most communities will experience a range of indicators that affect the quality of life within their neighborhood. Some trends of disinvestment include the transition of long-time residents, deferred maintenance of older housing stock, decrease in owner-occupancy, and zoning and land use changes that adversely affect the residential environment. Unless the cycle of disinvestment is reversed through an intervention strategy, neighborhoods, like the ones located near the District of Columbia/Subregion 4 boundaries, will not recover. Trends noted in Subregion 4 communities located close to the District of Columbia boundary illustrate the type of socioeconomic and housing conditions that represent the greatest threat to neighborhood instability. These areas could be characterized as "tipping point" neighborhoods because they illustrate areas in danger of becoming blighting influences within the subregion without planned intervention to reverse the trend. Tipping point areas within Subregion 4 can be found in many places including areas within established communities.

A great asset relating to the housing and neighborhood character has been generally established areas, consisting of stable, long-term residents. These characteristics are important attributes to neighborhood stability and also provide a foundation for future marketing to new homeowners. The most

frequently mentioned strength relating to housing within Subregion 4 was affordability. Many of the long-time residents, and more recent residents to the area, choose to live in the subregion because it offers affordably priced homes located in a quiet neighborhood setting.

Environmental Resources

Much of Subregion 4 was developed before significant environmental protections were enacted. Consequently, streams were piped and channeled and stream buffers removed. These actions have contributed to the degradation of water quality in local streams, the Anacostia River, the Potomac River and, ultimately, the Chesapeake Bay.

Large portions of the region were developed before the enactment of stormwater management regulations. Limited stormwater management controls, combined with large areas of impervious surfaces and a relatively low percentage of tree and forest coverage, have contributed to very poor water quality in Subregion 4. Drainage problems are also common. The region also suffers from illegal dumping into streams, parks, and open spaces. As the region's green infrastructure is restored and public areas are made more green, people who live, work and visit Subregion 4 will have opportunities to reconnect with the environment.

About 55 percent of the land area of the region is in the county's green infrastructure network, or six percent of the county's entire network. The subregion also contains two of the county's special conservation areas, including 1 of the 12 remaining magnolia bogs in the Washington, D.C., area. Restoring this network will provide many benefits to the region and support many of the goals in this master plan.

The county's Woodland Conservation and Tree Preservation Ordinance seeks to preserve woodlands in conjunction with floodplains, wetlands, stream corridors, and steep slopes and emphasizes the preservation of large, contiguous woodland tracts. Using this ordinance as a guide to increasing tree cover will provide opportunities to improve water quality and the quality of life in Subregion 4.

Tree cover has decreased in Subregion 4 over many years to approximately 4,400 acres in 2005, or about 23 percent of Subregion 4 as a whole. During the preplanning phase of this project, an analysis of tree cover and its relationship to stormwater management was completed. The analysis showed a need for additional tree cover in areas along stream corridors, stream buffers, and floodplains.

Public Facilities and Parks

Public Schools

Subregion 4 has a considerable share of the county's excess public school capacity: 72 percent of the available elementary school seats and 39 percent of the available middle school seats. Subregion 4 has 30 elementary schools, 5 middle schools, and 4 high schools. Prince George's County Public Schools (PGCPS) also operates an early childhood center, an alternative elementary school, and a visual and performing arts academy in Subregion 4. In addition, two closed elementary school buildings are still in PGCPS's capital inventory. Subregion 4 has several school administrative facilities and alternative schools, as well as several former PGCPS facilities now used for other purposes.

Generally speaking, public school facilities are aging in Subregion 4 and enrollment is declining, creating myriad planning issues relative to educational programs, school capacity. and school facilities. As older schools are redevelped or replaced, the urban school model should be utilized, especially in and near the centers and corridors.

Public Libraries

There are three branches of the Prince George's County Memorial Library System (PGCMLS) in Subregion 4. The Spauldings and Glenarden Branches are considered to be

underutilized, but the Fairmount Heights branch is generally thought to be undersized and inadequate to serve the greater highly populated region.

Public Safety

The Prince George's Police Department (PGPD) District III is contiguous with Subregion 4. The Department's headquarters is adjacent to PGPD headquarters at 7701 Barlowe Road in Palmer Park. The 2008 *Approved Public Safety Facilities Master Plan* recommends that this facility be renovated in the long-term (after 2021). Because of the urbanized nature of the region, response times have increased and a need has developed for a second station to be located in or around Capitol Heights.

The towns of Capitol Heights, District Heights, Fairmount Heights, Glenarden, and Seat Pleasant have police departments that provide additional first response capability within their town limits and supplement the efforts of the Prince George's County Police Department.

Fire and emergency medical services (EMS) are provided by the Prince George's County Fire/EMS Department (PGFD), which has both career and volunteer elements. There are seven fire/EMS stations in Subregion 4. Subregion 4 stations responded to 18,959 EMS calls for service in 2007, nearly 20 percent of all the calls in the county. They also responded to 5,901 fire calls, 19 percent of the county's calls.

Parks

Park facilities in Subregion 4 provide a wide selection of recreational amenities such as indoor spaces, outdoor facilities, nature, sports and fitness, history, and education. Fourteen of the sites are park/school sites, where a school and a park facility (either a community center or a developed park) are colocated and spaces are shared by both facilities. In all, Subregion 4 has 1,874 acres of parkland at 54 developed park sites and 15 undeveloped sites.

The 2002 General Plan for Prince George's County included a standard of 15 acres of parkland per 1,000 residents. On this measure, Subregion 4 lacks adequate parkland and by 2030 the region would need to add approximately 9,100 acres of parks to their inventory. In an effort to meet this standard, several parks are undergoing expansion and several sites have been identified as potential future parks that would add approximately 600 acres of parkland to the subregion. On a subregion scale, these additions would still not meet county standards. However, this plan also includes a new category of open space: urban squares, civic greens, and plazas. The creation of this category would allow for an alternative to the existing park models and provide the county different means through which to meet the minimum open space requirements.

Historic Resources

Subregion 4 includes many historic sites and resources in addition to the historic communities of Fairmount Heights, Capital Heights, and others. These are chronicled in the Historic Sites and Districts Plan and other historic preservation documents. Planning issues that should be considered by each community include the preservation and enhancement of community character through potential historic or conservation districts, façade improvement programs, and interpretive signage programs. Historic preservation efforts help to ensure the longevity and health of the built environment, economy, and social resources. By protecting and encouraging adaptive reuse of historic resources, opportunities can be created to embrace and celebrate the history that defines and unites the people of Prince George's County and Subregion 4.

Transportation

The plan area is currently served by an excellent transportation system, with direct access to the Capital Beltway (I-495/I-95). In addition to the Capital Beltway, major

roadways serving the Subregion area are the John Hanson Highway (US 50), Suitland Parkway, Pennsylvania Avenue (MD 4), Central Avenue (MD 214), Landover Road (MD 202), Martin Luther King, Jr. Highway (MD 704), Silver Hill Road (MD 458)/Walker Mill Road, Forestville Road/ Ritchie Road/ Garrett Morgan Boulevard, Addison Road, Shady Glen Drive/Hill Road, Brightseat Road/ Ardwick-Ardmore Road, Sheriff Road, Columbia Park Road, and Marlboro Pike. All these facilities provide local or regional mobility and access to destinations inside and outside the Subregion 4 area. It is important, however, to note that the existing road network is marginal in providing direct and continuous access and mobility within the subregion in the north/south direction. Another concern is with regard to the lack of convenient and pleasant local street grids especially within the designated centers and areas close to the seven Metro stations.

Industrial activities in Subregion 4 generate significant amounts of truck traffic. The increased truck traffic along some residential streets and neighborhoods in close proximity to the industrial uses is a concern.

The planning area also has excellent transit service offered by three Metrorail lines (Blue, Orange and Green). Seven Metrorail stations (Cheverly, Landover, and New Carrollton along the Orange Line; Capitol Heights, Addison Road, and Morgan Boulevard on the Blue Line; and Suitland on the Green Line) are within the Subregion.

Sidewalks are available along most major roadways in the Subregion. However, there are some roadway sections where sidewalks are missing, limited to only one side of roadway, or are in poor physical condition.

Demographic and Economic Base Analysis

Introduction

This section is an analysis of the demographic and economic conditions in Subregion 4 in relationship to Prince George's County and the surrounding region. It examines trends and projections in population, households, income, employment, and occupations. At a more detailed level, much of the demographic data in Subregion 4 is subdivided into three zones comprising six living areas as defined by the planning team. Detailed information regarding the unique demographic and economic characteristics of each zone is included in Chapter 5, Living Areas and Industrial Centers.

This closer analysis allows the planning team to better determine where particular efforts need to be concentrated. County and regional data is examined to better comprehend the competition that exists around Subregion 4.

Summary Of Major Findings

- Since 2000, the overall population growth rate in Subregion 4 (0.08 percent) has been substantially lower than in the rest of Prince George's County (7.9 percent). However, projections over the next five years show the annual growth rate in the subregion increasing to 0.3 percent. Much of this increase is expected to occur in Zones 1 and 2. Zone 3, the largest of the zones with 58,782 residents, will maintain its stable growth rate.
- Nearly one-third of the residents in Subregion 4 are school-aged (under 20), compared to 28 percent in the rest of the county and 26 percent in the region. More specifically, Zone 1 has the highest percentage of school-aged residents as 37 percent of its population is less than 20 years old.

Table 2-1: Population Trends 2000-2013							
Population				Percent Change		Annual Percent Change	
Study Area	2000	2008	2013	2000-2008	2008-2013	2000-2008	2008-2013
Zone 1: Living Areas A & C	36,126	36,643	37,700	1.4	2.9	0.2	0.6
Zone 2: Living Areas B & D	37,173	37,270	37,740	0.3	1.3	0.0	0.3
Zone 3: Living Areas E & F	58,315	58,782	59,059	0.8	0.5	0.1	0.1
Subregion 4	131,614	132,695	134,499	0.8	1.4	0.1	0.3
Rest of Prince George's County	669,901	722,517	753,162	7.9	4.2	1.0	0.8
Region	2,764,760	2,958,311	3,077,678	7.0	4.0	0.9%	0.8
Source: Site to Do Business online (STDBonline) & RKG Associates, Inc., 2008							

- More than 90 percent of the population in Subregion 4 is black. This low level of diversity is not expected to change substantially in the next five years. However, every race has increased marginally except the white population, which continues to decline.
- The average household size in Subregion 4 (2.77) is lower than the rest of the county (2.82), but four of the six living areas have household sizes that either equal or exceed this average. Furthermore, Living Areas D and F have average household sizes closely resembling the regional average (2.55), largely due to both having the highest rate of single-occupant households, exceeding 26 percent.
- Both median household and per capita income levels in Subregion 4 are growing at slower paces than in neighboring study areas. Currently, the median household income in Subregion 4 is $51,763, 24.5 percent lower than in the rest of the county and 43.6 percent lower than in the region. Households in Living Area E have the highest median income ($64,464) of all living areas, which is 15 to 32 percent higher than in any other living area.
- Relatively few Subregion 4 residents 25 years old and above (19.3 percent) have completed any form of post-secondary education. Comparatively, nearly 40 percent of this cohort in the rest of Prince George's County and 61 percent of the regional population have completed a post-secondary degree. This difference limits the competitive capacity of the subregion to attract higher paying jobs as most of such positions are filled by applicants with higher levels of educational attainment.
- In almost every category (forcible rape and nonresidential burglary excluded), the incidence rate for crimes reported in Subregion 4 is higher than in the rest of the county by at least 60 percent. Larceny/theft was the largest offense; it occurred 34 times for every 1,000 residents, whereas motor vehicle theft occurred nearly twice as often in Subregion 4 as it did throughout the rest of the county.

- The retail trade and construction industries provide for the greatest number of jobs in Prince George's County. However, much of the growth in the construction industry is likely to slow down as financing for projects is becoming more difficult to obtain due to the current mortgage-related banking crisis.
- Within Prince George's County, employment in educational services (3,859 total jobs) is growing rapidly with a 38 percent increase since 2000. The presence of four large colleges in the county greatly contributes to the growth in this industry; however, none of these schools is located in Subregion 4.
- The largest employment decline in the county has occurred in the management of companies and enterprises industry. However, while more than 4,000 jobs have been lost since 2000, the total number of companies (80) has remained the same. This change is likely the result of severe downsizing.
- The largest job losses in the region have occurred in the information, transportation, and warehousing industries; yet, these industries have grown in Prince George's County. The information industry has declined by 11,698 jobs in the region but has experienced a modest 8.2 percent growth rate in the county. The transportation and warehousing industry has lost 1,449 jobs regionally compared to the 1,062 added in the county. These growth trends provide foundations for Subregion 4 and the rest of the county to build upon as their market and industry presence continues to expand while it is shrinking regionally.
- The county's unemployment rate generally falls below that of Washington, D.C., and is slightly higher than the rest of the region. This indicates there may be more labor available for new or expanding employers in Prince George's County than in the rest of the region, excluding Washington, D.C.
- More than three-quarters of the occupations in Prince George's County are considered white-collar positions. The largest occupational skill group is high-skilled white-collar positions (123,995 workers), which comprised 36.6 percent of the occupational workforce in 2004.
- A computer specialist is a high-skilled, white-collar occupation that is growing quickly. Jobs in this category include network systems and data communication analysts (52.3 percent), computer software engineers/systems software (37.7 percent), network and computer systems administrators (33.0 percent), and computer software engineers/applications (29.9 percent) occupations.
- In Prince George's County, 12 of the top 14 highest paying detailed occupations are categorized as management or computer and mathematical positions. Over 27,000 positions are included in these 12 occupations. Management occupations have a median salary of $88,302 and computer and mathematical occupations have a median salary of $77,574.

Implications

Subregion 4 has not experienced comparable levels of growth and prosperity as the rest of Prince George's County and the Washington metropolitan area. The subregion is largely built out, offering few opportunities for new, greenfield development. Redevelopment projects are often more time-consuming, expensive, and controversial, making them less desirable to developers. Similarly, the subregion's demographic and economic conditions have not kept pace with other study areas. Subregion 4 residents generally have lower levels of education attainment and income, while experiencing higher crime rates. The impact of both limited development and economic growth have adversely impacted the other, creating a "Catch-22" situation in Subregion 4.

However, the growing disparity in affordability between Subregion 4 and the Washington metropolitan area creates a balance of risk and reward for certain business types and residents. The close proximity to Washington, D.C., combined with the subregion's relative affordability, attracted the attention of enterprising business owners and residents alike. Recent residential and non-residential development brought new, higher income workers and residents into the subregion. Opportunities still exist to reinforce the residential character of the living areas through strategic investments in high-quality housing. Continued investment in employment-producing areas, such as the industrial centers and the eight designated growth centers, will also bring prosperity to the subregion. However, these investments need to be coupled with social and workforce programs to enable the access of all area residents to new opportunities, thereby bolstering the subregion and its economy. The demographic data indicate a substantial divide between the poorest and wealthiest residents in Subregion 4. Bringing prosperity for some at the exclusion of others does not meet the stated goals of the county's 2002 General Plan, the expressed desires of Subregion 4 residents, nor does it create a sustainable community.

The perceptions and realities of safety impact the economic viability of Subregion 4 as an investment center. Concerns about safety were expressed almost universally by persons involved in this plan, such as elected officials, real estate professionals, and residents. Concerns about the ability to keep one's person and property safe has adversely impacted the market potential of Subregion 4. Crime statistics corroborate what individuals expressed; there is a higher incidence of crime in Subregion 4 than the rest of the county. This concern directly impacts the decision-making of business owners. Improving the perceptions and realities of safety should be a top priority.

In addition, focus should be given to improve the education opportunities for the subregion's large young population. As stated earlier, attaining higher levels of education typically correlates to higher income. The four post-secondary institutions located in Prince George's County and even those in Washington, D.C., provide ample alternatives for students pursuing the traditional college track. However, for those students not on this track, there is not sufficient access to the training required to pursue jobs in fast-growing occupational fields. Other outlets, such as training or work-to-hire programs are necessary. With a disproportionate number of residents under the age of 20, Subregion 4 needs a network in place to bridge the gap between employment growth and job preparedness.

Increasing education attainment levels also aids in addressing income disparity between Subregion 4 and the neighboring areas. This widening gap hinders attaining diverse retail offerings in the subregion. Many residents and stakeholders in the initial public meetings stated they wanted to see a larger variety of retail in and around their neighborhoods; this will only occur once the area spending potential increases. Emphasizing the development of new single-family, detached housing while assisting homeowners in renovating the existing housing stock will likely lead to an increase in the area's disposable income as individuals and families with greater levels of wealth are attracted to the subregion.

Residential and Retail Market Analysis

Introduction

Most activity and major investments in the retail and office markets are likely to occur at the eight "growth centers" located at the seven Metro stations and the former Landover Mall site (now Landover Gateway). Any retail and office activity occurring in the living areas or industrial centers focuses on neighborhood-level service provision. The analysis results presented here address the market potential of the living areas and industrial centers while avoiding competition for the growth centers.

Residential Market Analysis—Summary of Major Findings

- Residential housing accounts for the largest percentage of land uses within Subregion 4. Among these uses, single-family housing parcels comprise nearly half (3,717 acres) of the total developed land area and more than 28 percent (26.7 million square feet) of the total developed space. Townhouses and condominiums have a much smaller footprint than other for-sale housing options in the study area.
- Approximately 40 percent of the single-family units in Subregion 4 are located in Zone 2, where many of the subregion's established neighborhoods are located; much of the development occurred before townhouse and condominium development became popular in Prince George's County. As a result, this area is the least diverse in regard to the types of for-sale units. Of all the for-sale housing units in Zone 2, 84.3 percent of them are classified as single-family, detached. Comparatively, single-family units in Zone 1 account for 59.6 percent of all units and Zone 3 has a 62.9 percent share.
- Apartment development is concentrated in Zone 3; more than 10 million of the 21.1 million square feet of apartment buildings are located there. This concentration of apartment development is due, in part, to the concentration of high-density apartment complexes along Brooks Road, including Oakcrest Towers, Sussex Square, Lexington Courts, and Fox Club.
- Since 1998, nearly half of new for-sale residential units have been constructed in Zone 3. Zone 2 has experienced the least development, likely due to the limited amount of developable land. Although the pace of development for single-family, detached houses has remained stable in Zone 2, development of these units has slowed in both Zones 1 and 3 due to impacts of the regional and national economic downturn.
- As with much of the nation, the rate of home foreclosures has been increasing in Subregion 4, and 1,337 housing units are actively in the foreclosure process. Of this total, 90 have already been repossessed as of December 2008 by the lender and over 350 were going to auction.
- As of October 1, 2008, there were nearly 1,900 for-sale housing units planned, proposed, or platted in Subregion 4. Of these units, 769 had reached the recorded plat stage. The likelihood that these projects will be constructed is generally higher than the 1,121 units in the preliminary subdivision stage. Most of the residential development (74 percent) is projected to occur in the Suitland/District Heights communities south of Central Avenue.
- Over the next five years, the region is projected to add nearly 1,000 additional apartment units. A majority (856 units) of these are anticipated to be developed in the Landover market area. This development is projected to occur at a steady pace, as fewer than 200 units are forecast to arrive on the market each year from 2009 to 2012.
- Apartment vacancy has been very low in Subregion 4. Despite a slight increase in vacancy between 2001 and 2007 (most likely due to the strong purchase market), vacancy remained below five percent. Within the subregion, vacancy varied by submarket, as an increase in one area would correspond with a decline in another, suggesting high mobility within the local market.
- Sale prices for housing units in Subregion 4 declined substantially over the last year. According to a third quarter 2008 report released by Zillow, an on-line real estate services company, the average sale price for a residential unit in Subregion 4 fell below $240,000. This amount reflects a yearly percentage drop exceeding 17 percent in certain areas. Decreasing sale

prices are also occurring throughout the region. Prince George's County experienced similar trends as sale prices fell by 16.9 percent over the past year.

- Subregion 4 experienced a decline in sales activity. The number of single-family units that sold each year in Subregion 4 steadily decreased over the last two-and-a-half years. In 2006, nearly 2,100 units were sold. One year later, the sales volume declined to 1,553 units. The number of sales for 2008 is anticipated to total approximately 1,000 units.

Implications

For-sale housing demand in Subregion 4 is below recent activity levels. This is reflective of the national trend, where the downturn in the economy and the struggling financial market adversely impacts housing values. Demand for ownership housing has declined as potential buyers are concerned about continued loss in value.

With fewer homeowners entering the area and the market remaining soft, new investment opportunities and development efforts are likely to slow down. The effects of the for-sale housing demand downturn is further complicated by the area's foreclosure issue. Housing values are likely to continue to decline as foreclosures in the subregion exceed regional averages. This climate creates an unsure environment for any housing project in the pipeline.

The southern half of Subregion 4 was impacted harder by these factors. For example, the District Heights and Suitland neighborhoods saw single-family units sell further below initial asking prices than in northern areas, while also remaining on the market for longer periods of time. In addition, housing units in the southern portion of the subregion incurred the largest percentage losses in average sale prices over the past year. Although these trends eventually will reverse as the economy and financial markets rebound, the ownership market will remain a risky investment in the near future. As such, current vacancies, potential foreclosures, and pipeline projects will likely meet demand for an extended period of time.

Conversely, the area's for-rent housing market continues to be relatively strong. The low apartment vacancy rate in the area is evidence that demand continues to exceed recent trends. As mentioned, this is due, in part, to potential buyers remaining in rental units until the ownership market stabilizes. This demand level likely will continue to remain strong into the near future. Although there is a substantial development pipeline for apartment developments in the subregion, the market is projected to absorb this supply in a short period of time. As such, there may be opportunities to develop new apartment developments in Subregion 4. In turn, the resulting increase in residents may boost spending potential, thereby increasing the marketability of the subregion to retailers and service providers.

Retail Market Analysis

A neighborhood-level retail opportunity analysis and a regional analysis were performed for growth centers. Although the regional analysis focuses on the supply and demand for retail space to be occupied by businesses serving a larger client base, the neighborhood-level retail market analysis discussed concentrates on identifying the unmet needs of specific neighborhoods. This was done to avoid creating conflicting strategies about how to meet the demands for larger, more regionally-focused businesses. Simply stated, the current and projected level of demand for services will only support a fixed number of businesses. Trying to accommodate these businesses in multiple areas of the same community will create unhealthy competition between property owners and business owners. Therefore, this analysis focuses on those retail uses that generally serve a smaller market area, such as convenience stores, eating establishments, and personal services.

Map 2-2
Retail Supply Analysis Areas

The following section provides an overview of the supply and demand for retail goods and services in five neighborhood-serving commercial areas. These areas are anchored to a key intersection. They include: (1) Martin Luther King, Jr. Highway and Landover Road; (2) Martin Luther King, Jr. Highway and Addison Road; (3) Addison Road and Walker Mill Road; (4) Silver Hill Road and Suitland Road; and (5) Marlboro Pike and Forestville Road.

These study areas were selected because they met two primary criteria: (1) they were identified through market analysis and stakeholder input to have potential for development (redevelopment); and (2) they are not covered in the growth centers analysis. Although other neighborhood-serving commercial areas exist, these other areas do not present comparable potential to accommodate new development. The purpose of this section is to identify the market potential of these areas and make the appropriate recommendations about their viability as commercial centers.

Summary of Major Findings

- The amount of sales capture varies greatly by study area. The Marlboro Pike/ Forestville study area captures the greatest amount of sales, at more than $88.4 million This is not surprising, as the half-mile study area surrounding the Marlboro Pike/ Forestville Road intersection includes the Penn-Mar Shopping Center along Donnell Drive. In contrast, the Addison Road/Walker Mill Road study area businesses only captured $7.0 million in sales as a result of the lack of retail presence in the area.
- Consumer expenditures in the neighborhood commercial areas vary, but not as widely as retail sales capture. This is due to the relatively similar level of residential development surrounding these selected intersections. Four of the five study areas have 2008 estimates for consumer expenditures ranging between $43 million and $51 million. Only the Marlboro Pike/Forestville study area has a substantially lower demand for retail goods and services, in terms of dollars spent, than the other study areas. However, this finding is consistent with development trends in that area, as commercial and industrial land uses account for a majority of the local development.
- Most of the neighborhood commercial areas generally leak sales. The Martin Luther King/Landover Road, Martin Luther King/ Addison Road, Addison/Walker Mill Road and Silver Hill/Suitland Parkway study areas had a combined estimated net sales leakage of more than $75 million. If the Giant grocery store calculation is removed from the Martin Luther King/Addison Road study area, this total would be substantially higher. Although these study areas did have some retail categories where sales capture exceeded demand, the majority of segments in each study area experienced a net sales leak. This finding is consistent with other neighborhood-serving venues.

Implications

The market analysis indicates the Addison Road/Walker Mill Road study area has the greatest potential to support additional neighborhood-serving retail. The continued development of residential uses will add to the need for new commercial development. Serious consideration should be given to developing some retail venue at the Walker Mill Business Park, particularly on the “island” piece bound by Walker Mill Road, Hazelwood Drive, and Rochelle Avenue.

The Martin Luther King, Jr. Highway/Landover Road and the, Martin Luther King, Jr. Highway/Addison Road study areas also have opportunities for additional retail service provision, but much more limited than the Addison Road/Walker Mill area. This is due to the much larger existing commercial base in each study area. Within the Martin Luther King/Landover Road study area, any new commercial development should be done in close proximity to existing centers, preferably

the Dodge Park Shopping Center or the King Shopping Center. Although there are scattered retail/service sites to the northeast of the intersection along Martin Luther King with vacant adjacent parcels, clustering new retail with larger centers strengthens the viability of those sites and reduces the potential for disjointed development patterns. At the Martin Luther King/Addison Road study area, focus should be placed on improving the connection between the existing centers to the east of Addison along Martin Luther King and the Martin Luther King/Eastern Avenue intersection at the Washington, D.C., boundary. The existing stock along this corridor is a mixture of uses and conditions. Reinvesting in these parcels and connecting Eastern Avenue to Addison Road, in terms of retail service, will draw shoppers from Fairmount Heights, Seat Pleasant, and Washington, D.C.

The current development plan for the property owned by Mid-Atlantic Real Estate Investments, Inc., at the corner of Silver Hill and Suitland Roads will increase the market demand for goods and services, making new development viable. However, the plan also calls for 36,000 square feet of commercial space, including restaurants and a pharmacy. As such, the demand created by the project likely will be met by the commercial component of the project. Given the recapture potential is relatively small for this area, the new development likely will capture this spending as well. As such, providing support for this project will improve the health of the retail market, meet the short-term needs of existing residents, and provide additional dining and shopping alternatives for employees at the Suitland Federal Center.

In contrast to the other neighborhood commercial study areas, the Marlboro Pike/ Forestville study area generally is well supported by existing retailers along Marlboro Pike, despite the lack of economic activity of the Forestville Plaza and the strip center in front of the Marlo facility. Given that Forestville Plaza is not supporting the retail operations of the study area, consideration should be given to the future of the property. Despite the general use of the facility as a religious center, the site has the potential to accommodate new industrial development within the subregion without substantial impacts to the existing residential community. If redeveloped as an industrial site, the plaza will improve the county tax base by bringing in revenue-producing tenants, increasing the number of jobs available for subregion residents, advancing the reinvestment occurring along Marlboro Pike between Forestville and the Beltway, and enhancing the existing Forestville Center industrial area. This redevelopment also could accommodate industrial users potentially dislocated by the development of the growth centers, particularly those along US 50, where industrial users fall well within the growth center boundary.

Housing and Neighborhood Analysis

Introduction

This master plan provides a framework for how housing development and neighborhood revitalization should be approached in Subregion 4. The plan provides an opportunity to achieve a healthy balance between the conservation of existing housing stock and traditional neighborhood development patterns and the introduction of new housing developments that are attractive to a range of household incomes currently living or moving into Subregion 4.

An overview of current housing-related economic and demographic conditions strongly suggests that Subregion 4 is the most affordable area to live in Prince George's County. However, over the past ten years, the subregion experienced a significant reduction of owner-occupied households and a sharp rise in lower-income households. Immediate action is required to address these trends in order to stabilize and then reverse

disinvestment. Key socio-economic and demographic characteristics that reflect current trends include:

- The 2000 census reported that 52 percent of households in Subregion 4 are owner-occupied, compared to 62 percent in Prince George's County.
- Ten percent of residents now living in Subregion 4 lived in Washington, D.C., in 1995 versus five percent now living in other parts of the county.
- As of August 2008, Subregion 4 had a median sales price range between $199,900 and $251,700, compared to nearby cities in Prince George's County with a median price range between $329,445 and $337,000.
- Housing and neighborhood conditions in communities close to Washington, D.C., and the Subregion 4 boundary reflect significant in-migration of lower-income households that require public support for housing expenses and other basic household functions.
- Significant shifts from owner-occupied, single-family homes to single-family rental homes; decreases in the median income of households; and significant increases in the number of homes with outstanding code violations are indicators that some neighborhoods within Subregion 4 are at critical tipping points in their life cycle.
- Important cultural and historic landmarks and defining neighborhood characteristics are in danger of being lost because of a lack of neighborhood reinvestment, an increase in crime, outstanding building code violations, and an increase in vacant homes caused by foreclosures. This trend is more evident in older areas of Subregion 4, such as in Glenarden, Fairmount Heights, Seat Pleasant, Capitol Heights, and District Heights.

Implications

Household income distributions are important since they translate into housing affordability. In the third quarter of 2008, for most of Subregion 4, mortgages ranged from $199,000 to $251,700. In order to service a mortgage in this price range, the household income should be approximately $100,000 annually (depending on interest rate, taxes, and insurance). The 2000 census estimated that the median household income in Subregion 4 was slightly more than $45,000. Even though it is likely that median household income rose significantly over the past eight years, it is unlikely that income increased by over 100 percent. A continued increase in rental households and a continued decrease in the development of new owner-occupied households, especially single family detached homes, is expected. Although this is not necessarily a bad trend for neighborhoods, a stable neighborhood is generally defined by the amount of homeownership. However, this is not necessarily indicative of neighborhood decline. Yet, an overwhelming number of residents interviewed for preparation of this plan expressed a preference for living in neighborhoods with suburban characteristics. Generally suburban housing characteristics are defined by single-family detached development patterns.

Stakeholders were concerned about the perceived lack of code enforcement and the demographic shifts in Prince George's County caused by the influx of lower-income Washington, D.C., residents. Stakeholders expressed concern about the stability of the older Subregion 4 neighborhoods. However, because of housing affordability, close proximity to employment opportunities in Washington, D.C., and easy access to transit stations, Subregion 4 has an opportunity re-establish itself as a great place to live.

Industrial Market Analysis

Introduction

This section outlines the industrial market forces in and around Subregion 4 that are influencing development activity within the main industrial area. Gaining an understanding of the local and regional real estate conditions informs recommendations for the subregion vision plan. Current trends and projections in supply, vacancy, sale pricing, leasing, and absorption were analyzed.

Summary of Major Findings

- Subregion 4 constitutes approximately 34.5 percent of the county's industrial building space. Development is concentrated along US 50 and I-95/495.
- The size and type of industrial users vary greatly, as Subregion 4 has a wide variety of industrial stock. The average industrial property in Subregion 4 has a floor-to-area ratio of 0.30. This represents a very dense development pattern for industrial uses.
- Newly developed projects have had greater densities than previously existing properties. The scarcity of industrial-zoned land has created a demand for a higher-density development in order to maximize land use and value.
- Most of Prince George's County's industrial-zoned land is developed, with the exception of a few parcels in the Brandywine area at the far southeast corner of the county. As a result, the level of industrial development has been comparatively modest.
- Subregion 4 has experienced industrial development activity comparable to the rest of Prince George's County. Most of the development within Subregion 4 occurred in Zone 3. This activity primarily occurred in the Steeplechase 95 industrial park, located on Ritchie-Marlboro Road and the Capital Beltway.

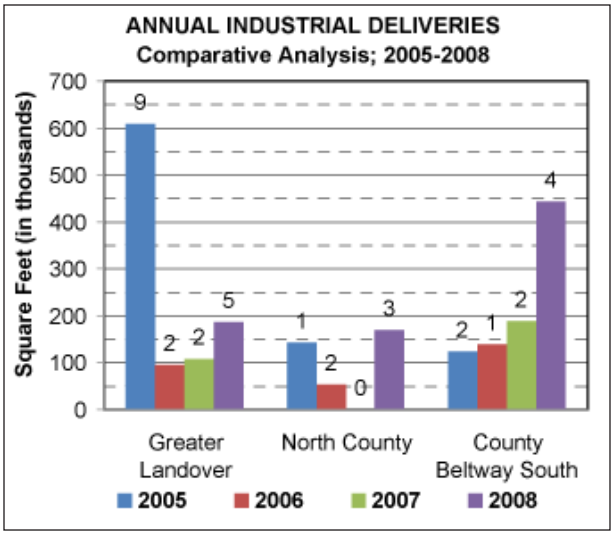


Figure 2-1

- In contrast, only one industrial project was delivered in both Zones 1 and 2 since 1998. This primarily is due to the lack of desirable, developable industrial land in either zone.
- There are approximately 270,000 square feet of industrial space currently being built in the regional study area, predominantly along the I-95 corridor on the north side of the county. Approximately 500,000 square feet of additional warehouse and flex office space is proposed at the Steeplechase 95 development within Subregion 4. This additional space is projected to be completed by November 2011.
- Subregion 4's industrial vacancy rate is between 10 percent and 13 percent, two percentage points higher than the regional industrial average. The Ardwick/Ardmore and the Steeplechase 95 industrial parks have relatively low vacancy rates.
- The regional study area's average asking rent for third quarter 2008 is $7.18 per square foot, 25 percent higher than the national average of $5.75.
- Local real estate professionals indicated that demand for all classes of space is strong. The location benefits of Subregion 4 make it very desirable for tenants who find less utility in the amenities of Class A space. However, tenants of Class B and C spaces generally do benefit from slightly lower rents in lieu of "better" space.

Implications

The regional industrial market remained stable despite the recent economic and fiscal fluctuations. Unlike the retail and residential markets, industrial property owners have not seen a sharp decline in demand. As a result, industrial vacancy rates remained stable and rental rates steadily increased through the third quarter of 2008. Data provided by realtors and industrial property owners in Subregion 4 indicate the local market remains strong as well. In particular, interest for the industrial portion of the Steeplechase 95 project is keeping the development timeline on pace with the owner's expectations.

Although it is likely that a prolonged slowdown of economic activity eventually will adversely impact the industrial market, the market data indicate that the portions of Prince George's County nearest to the Beltway, including Subregion 4, are highly desirable to industrial users. As mentioned, Subregion 4 provides an industrial user excellent access to local, regional, and national markets. Given the fact that the Washington, D.C., government has made consistent decisions to limit, and even eliminate, industrial uses from Washington, D.C., areas like Subregion 4 provide the next best location to those companies that serve Washington, D.C., clients. Furthermore, Prince George's County and Subregion 4 provide a better value to industrial users, as lease rates are below regional competitive areas. Local lease rates are half of some Washington metro competitors.

The existing industrial developments in Subregion 4 along US 50 and I-495 likely will continue to thrive into the future. However, the potential development strategy for the growth centers at the Cheverly, Landover, and New Carrollton Metro stations may create a conflict, as industrial users are within the development area. As such, a strategy should be incorporated into the sector plan to accommodate the displaced businesses elsewhere in the county. There currently are not many options for businesses to locate within proximity to the Beltway.

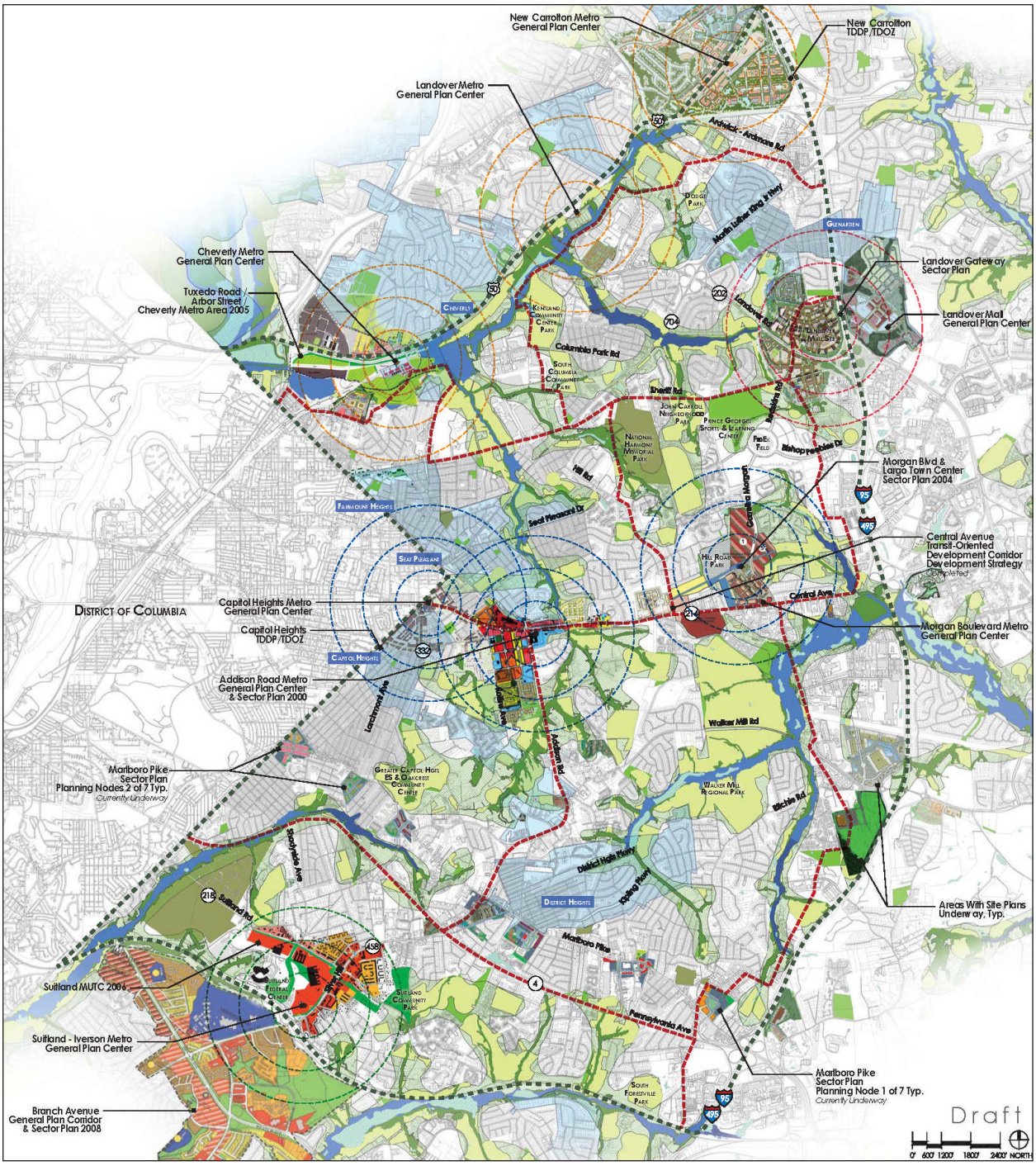
Pipeline Development Projects

During the Subregion 4 master planning process a series of development projects within the subregion boundaries and in the immediate vicinity were already underway. The planning team utilized the county's available database and recorded conceptual site plans and detailed site plans that had been approved by the Planning Board and therefore would most likely be implemented in the near future. Map 2-3 includes all these plans overlaid on the existing road network, as well as the area's environmental constraints. The resulting map is a more accurate depiction of the subregion's urban framework and the base upon which additional proposals could be made.

Analysis of Growth Projections

As part of the economic development analysis, growth projections were developed for the living areas and industrial areas within Subregion 4 through the year 2030. These projections are intended to help determine the potential demand for additional capital investments in infrastructure (e.g., roads) and community facilities (e.g., emergency services) as a result of development outside the growth centers. The projections were calculated using two methods, household growth and housing development. These methods provide different ways to better understand the subregion's market potential.

Projection periods beyond five to ten years become speculative. It is nearly impossible to determine the investment climate for real estate long term. This is evident in the current economic cycle. The "boom and bust" real estate market shifts experienced regionally and nationally between 1998 and 2008 are anomalies to historic patterns. Predicting such vast shifts in the market is highly improbable. In addition, the recent market turmoil of 2008 and early 2009 adds to the difficulty in projecting patterns into the future. Most notably, there is much debate over the potential "recovery time" required for regional



Map 2-3

Summary of Completed or Currently Underway Plans and Projects

and national markets to return to some form of equilibrium. As such, the projections presented in this report represent the best anticipation of market conditions by the planning team.

The residential projection analysis is slightly more complex than the retail and industrial analysis. Prince George's County produces forecasts for the Metropolitan Washington Council of Governments (MWCOG). This information is combined with assessments from each of the other member jurisdictions and is used to plan for future regional investment needs due to local growth patterns. The results of the county's effort, as well as the internally generated data, were considered. The results of these efforts are presented in this section.

MWCOG Round 7.1 Cooperative Forecast

Prince George's County's Round 7.1 projections for housing units and household counts were used for this analysis. The Cooperative Forecast information developed by Prince George's County reflects both previous market performance, as well as policy goals established by the county's elected officials. Based on this analysis, the Round 7.1 projections indicate Subregion 4 will experience a net increase of 1,927 new housing units and 1,393 new households between 2010 and 2020. Growth and development is projected to increase in the long-term, as the subregion is expected to experience a net gain of 2,719 housing units and 4,682 households between 2020 and 2030 (Table 2-2).

Household Growth Approach

An analysis of recent household growth trends within Subregion 4 were analyzed to determine the net migration patterns in and out of Subregion 4. Household growth trends indicate the subregion experienced a net increase of approximately 67 households annually between 2000 and 2008. This pace of growth is well below the average for the 1990s, when Subregion 4 experienced a net gain of nearly 350 households annually (Table 2-3). Overall

Table 2-2: Round 7.1 Cooperative Forecasts for Subregion 4

Study Area	Count			Change		
	2010	2020	2030	2010-2020	2020-2030	Total 2010-2030
Household Count	49,167	50,560	55,242	1,393	4,682	6,075
Housing Unit Count	53,923	55,850	58,569	1,927	2,719	4,646

Source: Prince George's County and RKG Associates, Inc., 2009

Table 2-3: Household Formation Trends and Projections

Study Area	Households			Change		Annual Change	
	1990	2000	2008	1990-2000	2000-2008	1990-2000	2000-2008
Zone 1: Living Areas A & C	10,346	11,990	12,225	1,644	235	164.4	29.4
Zone 2: Living Areas B & D	12491	13,794	13,880	1,303	86	130.3	10.8
Zone 3: Living Areas E & F	21,122	21,632	21,840	510	208	51.0	26.0
Subregion 4	43,959	47,416	47,945	3,457	529	345.7	66.1

Source: Site to Do Business online (STDBonline) & RKG Associates, Inc. 2009

household growth levels likely will reflect the more recent trends into the near future, as the economic downturn and financial troubles will continue to adversely impact the ability to purchase and maintain a home. However, more stabilized economic conditions likely will trigger additional investment in Subregion 4. As such, the growth in households projected remain more modest over the next five to seven years, and likely will increase as economic conditions begin to improve. Projections indicate that there will be a net increase of approximately 1,000 households within the living areas of Subregion 4 between 2010 and 2020. The subregion may experience a net increase of 2,000 more households in the living areas by 2030.

Housing Development Approach

Similar to the household growth approach, the housing development approach was developed by studying recent housing construction trends, adjusting these levels based on projected market performance and economic certainty. Approximately 300 housing units were constructed each year during the 2000s within Subregion 4. Development was strongest between 2005 and 2007 at the height of the housing boom in the region. However, Prince George's County property assessment records indicate that fewer than 100 units were delivered between January and October of 2008 (Table 2-4). This trend most likely will continue into the future, as the housing market recovers from the recent downturn. Conditions in Subregion 4 are exacerbated as more than 1,300 housing units currently are somewhere in the foreclosure proceedings. As such, a majority of these units likely will be available on the market over the next three years, increasing the competition for residential developers.

Housing development likely will remain slow over the next five to seven years for the entire subregion. The focus of development at the General Plan centers will limit the market opportunities for higher-density housing within the living areas, as the development in the centers likely will offer better amenities and more convenient access to mass transportation. As a result, housing development within the living areas of Subregion 4 will be more concentrated in single-family, detached houses rather than condominiums and townhouses. It is projected that Subregion 4

Table 2-4: Subregion 4 Residential Construction Trends 2000-2008

Year	Single-Family	Townhouse	Condominium	Apartment	Total
2000	58	147	0	0	205
2001	128	197	0	0	325
2002	165	129	0	0	294
2003	171	6	15	253	445
2004	64	10	75	0	149
2005	42	7	5	407	461
2006	55	52	62	0	169
2007	49	149	52	291	541
2008*	17	28	40	0	85
Total Annual	749	725	249	951	2,674
Average	83.2	80.6	27.7	105.7	297.1

Source: Prince George's County and RKG Associates, Inc., 2009
**Data includes January to October of 2008 only.*

will experience a net gain in housing units of approximately 750 dwellings between 2010 and 2020. Growth projections are higher over the next ten-year period. The net gain for the living areas between 2020 and 2030 is approximately 1,400 housing units.

Implications

The growth projections prepared by the county and those prepared by the planning team vary greatly. County-developed growth projections identify a net gain of more than 6,000 households and nearly 4,650 housing units during the 20-year study period (Table 2-5). In contrast, the planning team project a net growth of 3,000 households and 2,150 housing units within the living areas during the same time.

The disparity is due, in part, to the fact that the planning team's numbers do not include development at the General Plan centers. As mentioned, the county-derived numbers were developed utilizing market data as well as policy preferences of the elected officials. In comparison, the planning team's calculations account solely on market conditions. The policy decision to promote development at the General Plan centers within Subregion 4 is as much a policy mandate of the county as it is a market-driven opportunity. As such, the round 7.1 forecast developed by the county's planning department for MWCOG includes the impact of interregional shifts in consumption of housing. This shift will only occur if the desirability of living within close proximity to a Metro station continues. For the centers to succeed, existing demand patterns in the marketplace will need to adjust based on the introduction of the new market opportunity at these sites.

Table 2-5: Household and Housing Unit Growth Projections

	2010	2015	2020	2025	2030	Total
7.1 Household Projections	-	284	1,109	2,009	2,673	6,075
7.1 Housing Units Projections	-	1040	887	793	1,926	4,646
Household Growth Approach	-	375	625	1,000	1,000	3,000
Housing Development Approach	-	250	500	700	700	2,150

Source: Site to Do Business online (STDBonline) & RKG Associates, Inc. 2009