



Adelphi Road-UMGC-UMD Purple Line Station Area Sector Plan

Market Study Report

 THE MARYLAND-NATIONAL CAPITAL PARK AND PLANNING COMMISSION
Prince George's County Planning Department

AUGUST 2021

Abstract

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To support the new Sector Plan and Sectional Map Amendment, the Maryland-National Capital Park and Planning Commission (M-NCPPC) hired a consultant team to prepare a market analysis of the Adelphi Road-UMGC-UMD Purple Line Station Area Sector Plan. The Sector Plan will implement the recommendations of Plan 2035 for the UMD West Campus Center by documenting and analyzing existing conditions in the plan area; leading an inclusive community engagement and visioning process; identifying the market potential of the plan area; identifying opportunities to increase and improve access to the nearby transit stations; evaluating stormwater management strategies; and supporting walkable, transit-oriented and transit-supportive development consistent with Plan 2035's recommendations for Campus Centers around the Adelphi Road Purple Line station. Deliverables will assist Prince George's County Planning Department staff to better align planning with market realities and dynamics and optimize future development opportunities around existing transit stations while creating sustainable, vibrant urban places. The plan will be instrumental in the County's future land use decisions aimed at positioning the County to attract investments, build its commercial tax base, fund critical services, grow its high-quality job base, and improve the quality of life of existing and future residents.



August 2021

**By Partners for Economic Solutions, LLC, Torti Gallas + Partners, and Kimley-Horn
for The Maryland-National Capital Park and Planning Commission**

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The Commission has three major functions:

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- The acquisition, development, operation, and maintenance of a public park system.
- In Prince George's County only, the operation of the entire county public recreation program.

The Commission operates in each county through a Planning Board appointed by and responsible to the County government. All local plans, recommendations on zoning amendments, administration of subdivision regulations, and general administration of parks are responsibilities of the Planning Boards.

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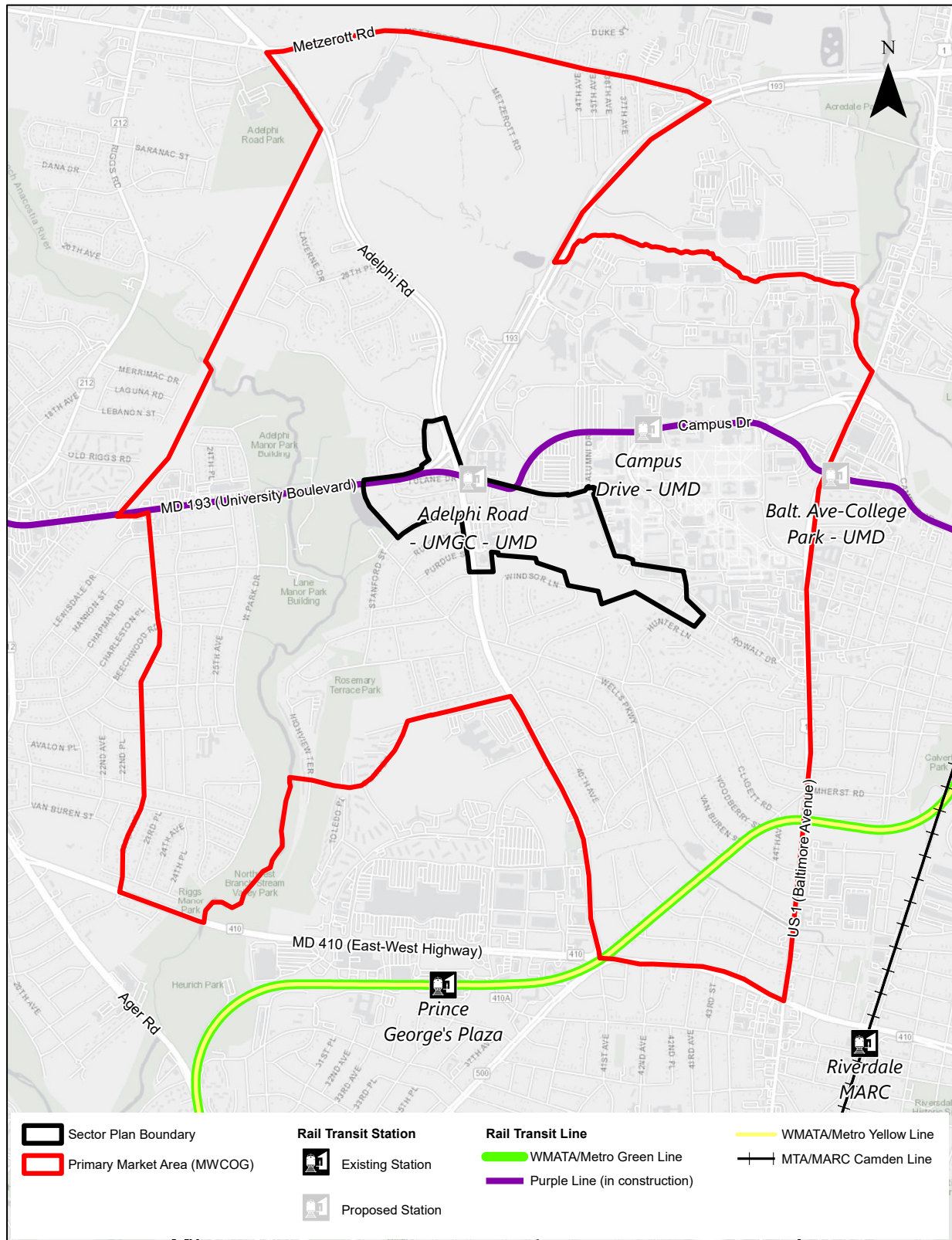
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Map 1. Adelphi Road-UMGC-UMD Purple Line Station Area Sector Plan Area and Primary Market Area (PMA) Boundaries





Introduction

Partners for Economic Solutions, LLC (PES) conducted a market study in early 2021. This work commenced with a tour of the Adelphi Road Purple Line Station area and areas just beyond the Sector Plan area, including the City of College Park and the University of Maryland, College Park (UMD) campus. The Maryland-National Capital Park and Planning Commission's (M-NCPPC) Prince George's County Planning Department staff provided background information, data resources, and insights from listening sessions with area stakeholders. PES gathered detailed market data from third-party sources¹ and government entities.² These valuable insights included input from additional stakeholder interviews, conducted as one-on-one interviews from January to March 2021 to help target the market research.³

Area demographics are the foundation of market analysis. Population and household characteristics and trends are provided for the Adelphi Road Sector Plan Study Area⁴ and the larger Primary Market Area (PMA), which represents the area likely to generate the bulk of demand for study area real estate. The PMA comprises nine adjacent Metropolitan Washington Council of Government Transportation Analysis Zones (MWCOTAZ) within one-half mile of the proposed Purple Line Station of Adelphi Road-UMGC-UMD. Map 1 shows the Adelphi Road Sector Plan area and PMA boundaries. Data for the City of College Park and Prince George's County are provided for comparison purposes. Additional demographic data sets appear in the Appendix.

¹ Third-party sources included CoStar, Inc; Esri Business Analyst Online; and various brokerage reports.

² Government entities include: Maryland-National Capital Park and Planning Commission; City of College Park; Metropolitan Washington Council of Governments.

³ Stakeholder interviews included calls to area real estate brokers, apartment managers, and large institutional anchors – UMD, UMG and St. Mark's Church.

⁴ Adelphi Road Sector Plan Study Area includes the following Prince George's County Transportation Analysis Zones (TAZs): 916, 917, 918, 920, 975, 976, 977, 979, and 980.

Table 1. Population and Household Trends, 2000-2020

	Primary Market Area ¹		City of College Park		Prince George's County	
Population						
2000	19,264		24,925		801,473	
2010	22,808		30,140		863,420	
2020	24,212		31,863		904,929	
2000-2020 Change	4,948	25.7%	6,938	27.8%	103,456	12.9%
2000-2010 Change	3,544	18.4%	5,215	20.9%	61,947	7.7%
2010-2020 Change	1,404	6.2%	1,723	5.7%	41,509	4.8%
Households						
2000	3,767		6,236		286,599	
2010	4,083		6,682		304,042	
2020	4,357		7,052		316,756	
2000-2020 Change	590	15.7%	816	13.1%	30,157	10.5%
2000-2010 Change	316	8.4%	446	7.2%	17,443	6.1%
2010-2020 Change	274	6.7%	370	5.5%	12,714	4.2%

Table 2. Race and Ethnicity, 2000-2020

	Primary Market Area ¹		City of College Park		Prince George's County	
	2010	2020	2010	2020	2010	2020
White	12,766	12,466	19,030	18,078	166,059	160,776
Black	3,715	3,666	4,276	4,626	556,620	561,319
American Indian	85	98	88	105	4,258	4,962
Asian	2,837	3,447	3,838	4,549	35,172	38,909
Pacific Islander	12	11	20	26	541	598
Some Other Races	2,522	3,403	1,820	3,056	73,441	104,685
Two or More Races	870	1,121	1,068	1,421	27,329	33,680
Total	22,807	24,212	30,140	31,861	863,420	904,929
Hispanic Origin	4,315	6,153	3,595	6,178	128,972	184,871

Table 3. Population by Age, 2000-2020

	Primary Market Area ¹		City of College Park		Prince George's County	
	Number	Percent	Number	Percent	Number	Percent
0 to 19 Years	9,391	38.8%	10,489	32.9%	229,201	25.3%
20 to 24 Years	6,796	28.1%	10,075	31.6%	64,883	7.2%
25 to 34 Years	2,360	9.7%	3,505	11.0%	136,064	15.0%
35 to 44 Years	1,548	6.4%	2,076	6.5%	122,334	13.5%
45 to 54 Years	1,237	5.1%	1,673	5.3%	115,758	12.8%
55 to 64 Years	1,433	5.9%	1,894	5.9%	112,336	12.4%
65 to 74 Years	885	3.7%	1,273	4.0%	77,717	8.6%
75 to 84 Years	406	1.7%	625	2.0%	35,092	3.9%
85 Years and over	156	0.6%	254	0.8%	11,544	1.3%
Total	24,212	100.0%	31,864	100.0%	904,929	100.0%
<i>Median Age</i>	<i>22.0</i>		<i>22.7</i>		<i>36.7</i>	

¹ Adelphi Road-UMGC/UMD Purple Line Station Area Sector Plan Primary Market Area includes the following Metropolitan Washington Council of Governments Transportation Analysis Zones 916, 917, 918, 920, 975, 976, 977, 979 and 980.

SOURCE: US Census Bureau, Census 2010 Summary File 1; Esri, Demographic and Income Profile, accessed January 2021; Partners for Economic Solutions, 2021.

Demographics

General demographic and economic trends for Prince George's County, the City of College Park and the Adelphi Road-UMGC-UMD Purple Line Station Area Sector Plan area indicate growth. As shown in Table 1, significant population growth occurred in the PMA from 2000 to 2020, and included gains of 1,404 new residents and 274 households in the past 10 years. The majority of this growth reflects new residential development spurred by enrollment growth at UMD and employment gains at nearby anchor institutions. The number of households grew at nearly the same rate within the City of College Park and Prince George's County as a whole in the past 10 years, based on estimates prepared by Esri, a national demographic data provider.

More than 60 percent of the population is under 25 years old in both the PMA and the City of College Park because of the large number of college students and young families. Median ages of 22.0 years for the PMA and 22.7 years for the City of College Park are much younger than the 36.7 years in Prince George's County as a whole.

The Sector Plan PMA population is ethnically diverse; 15 percent of residents identify as Black and population growth was concentrated in the Asian, "two or more races," and "some other races" demographic categories. More than 25 percent (of all races) identify as Hispanic — a higher percentage than the County or College Park. The Hispanic population in the PMA grew by 42.6 percent from 2010 to 2020.

Eighteen percent of households in the PMA are single-person households compared to 29 percent in both the City of College Park and Countywide. This reflects the greater prevalence of single-family housing found in the Sector Plan PMA, which is west of the UMD's campus at College Park. In the Sector Plan PMA, 47.2 percent of households rent their units as compared to 37.3 percent in all of Prince George's County, again reflecting the number of students living in the neighborhoods.⁵

Adelphi Road-UMGC-UMD Purple Line Station Area Sector Plan PMA households have a median income

of \$81,359 according to Esri—higher than the City of College Park's median household income of \$61,492. College Park captures the largest number of students living in the area, with 35.6 percent of households earning less than \$35,000. Many of these households comprise students whose incomes do not include any supplemental income provided by parents. With affluent pockets of housing, 26 percent of PMA households earn more than \$150,000, compared to only 21.5 percent in Prince George's County and 17.9 percent in the City of College Park.⁶

More than half of PMA residents commute by car and 22.3 percent walk to work, reflecting the high number of UMD staff and students living in the area. Similarly, 17.9 percent of College Park residents walk to work. In contrast, only 2.0 percent of all Prince George's County residents walk to work.⁷

Student Count

In 2020, UMD and UMGC collectively had 99,232 students (see Table3). The stable growth in enrollment over the past five years shows UMD's efforts to expand the undergraduate program with the addition of 2,400 undergraduates. UMGC students attend classes virtually or at satellite locations.

Table 4. Student Population Trends, 2016-2020

	2016	2017	2018	2019	2020
University of Maryland College Park					
Undergraduate	28,472	29,868	30,762	30,511	30,872
Graduate	10,611	10,653	10,438	10,232	9,834
Total	39,083	40,521	41,200	40,743	40,706
University of Maryland Global Campus					
Undergraduate	44,219	45,604	47,253	46,162	47,080
Graduate	13,310	13,775	13,350	12,119	11,446
Total	57,529	59,379	60,603	58,281	58,526

SOURCE: University of Maryland IRIS Dashboard, accessed February 2021; Partners for Economic Solutions, 2021.

⁵ See Appendix Table A4.

⁶ See Appendix Table A5.

⁷ See Appendix Table A6.

Households with People Aged 55 and Over

Of particular interest for the Adelphi Road Sector Plan area potential development is the extent of empty nesters and retirees. The oldest baby boomers are now 75, and many age into retirement every year.

The Sector Plan PMA has 2,318 residents (9.6 percent) aged 55 to 74. An additional 406 residents (1.7 percent) are aged 75 to 84; the residents of this age group are those most likely to live in independent senior housing. Residents aged 85 and over total 156 (0.6 percent); a greater share of these residents requires assisted living or skilled nursing.⁸

As shown on Chart 1, about 85 percent of PMA households headed by individuals aged 55 and over own their homes, compared to only 19 percent of those householders between the ages of 25 to 34.⁹

Economic Generators

Economic engines for the Sector Plan PMA include the County's largest employer—UMD, which employs 13,977 staff and faculty on the College Park campus—as well as UMGC, with more than 5,580 employees.¹⁰ These two employers along with supporting entities, including several government agencies located primarily in the university's research park, create the driving economic generators for the area. Longitudinal Employers-Household Dynamics data confirm the university's dominance in the College Park economy. Educational services accounted for 19,555 jobs in College Park in 2018—two-thirds of the citywide total job base. Retail trade and accommodations and food services, which are largely supported by the university-related activity, accounted for another 13 percent of jobs. College Park had 2,214 public administration jobs in 2018, reflecting the presence of federal offices as well as the City of College Park itself. A full listing of Adelphi Road-UMGC-UMD Purple Line Station Area Sector Plan area businesses is in the Appendix.¹¹

Launched in 2015, a Greater College Park public-private partnership (P3) among the City of College Park, Prince George's County, UMD, and private

Table 5. Faculty and Staff Trends, 2016-2020

	2016	2017	2018	2019	2020
University of Maryland College Park					
Faculty	4,394	4,425	4,446	4,468	4,264
Professional Staff	5,697	5,806	5,774	5,846	5,736
Graduate Assistants	3,981	4,109	4,188	4,191	3,977
Total	14,072	14,340	14,408	14,505	13,977
University of Maryland Global Campus					
Faculty	3,437	3,672	3,887	3,739	3,837
Professional Staff	1,459	1,675	1,708	1,626	1,740
Graduate Assistants	142	7	6	6	6
Total	5,038	5,354	5,601	5,371	5,583

SOURCE: University of Maryland IRIS Dashboard, accessed February 2021; Partners for Economic Solutions, 2021.

developers grew out of the College Park City-University Partnership. The effort began with the Hotel at the University of Maryland and expanded to the Discovery District (UMD's research park), which will be connected to this Sector Plan area by the Purple Line. Greater College Park P3 has a \$2 billion fund to support development in College Park.

Resident-based employment by occupation and industry for the most recent year indicates that most residents work in white-collar professions – 67 percent of PMA residents and 69.7 percent of College Park residents.¹² Fewer Prince George's County residents hold white-collar jobs at 61.2 percent. For all three geographies, residents working in service professions represent 18 to 20 percent of all employed residents.

Anchored by a major higher education institution, the City of College Park's business community has roughly 1,055 businesses that provide jobs ranging from minimum wage fast-food jobs, post-doctorate graduate positions, and faculty positions, according to Esri Business Locator.¹³ Daytime population estimates for the PMA and City of College Park total 30,681 and 43,757 people daily, respectively.

⁸ See Appendix Table A3.

⁹ See Appendix Table A7.

¹⁰ University of Maryland IRIS, <https://www.usmd.edu/IRIS/>, accessed February 2021.

¹¹ See Appendix Table A8.

¹² See Appendix Table A9.

¹³ See Appendix Table A8.

Residential Conditions

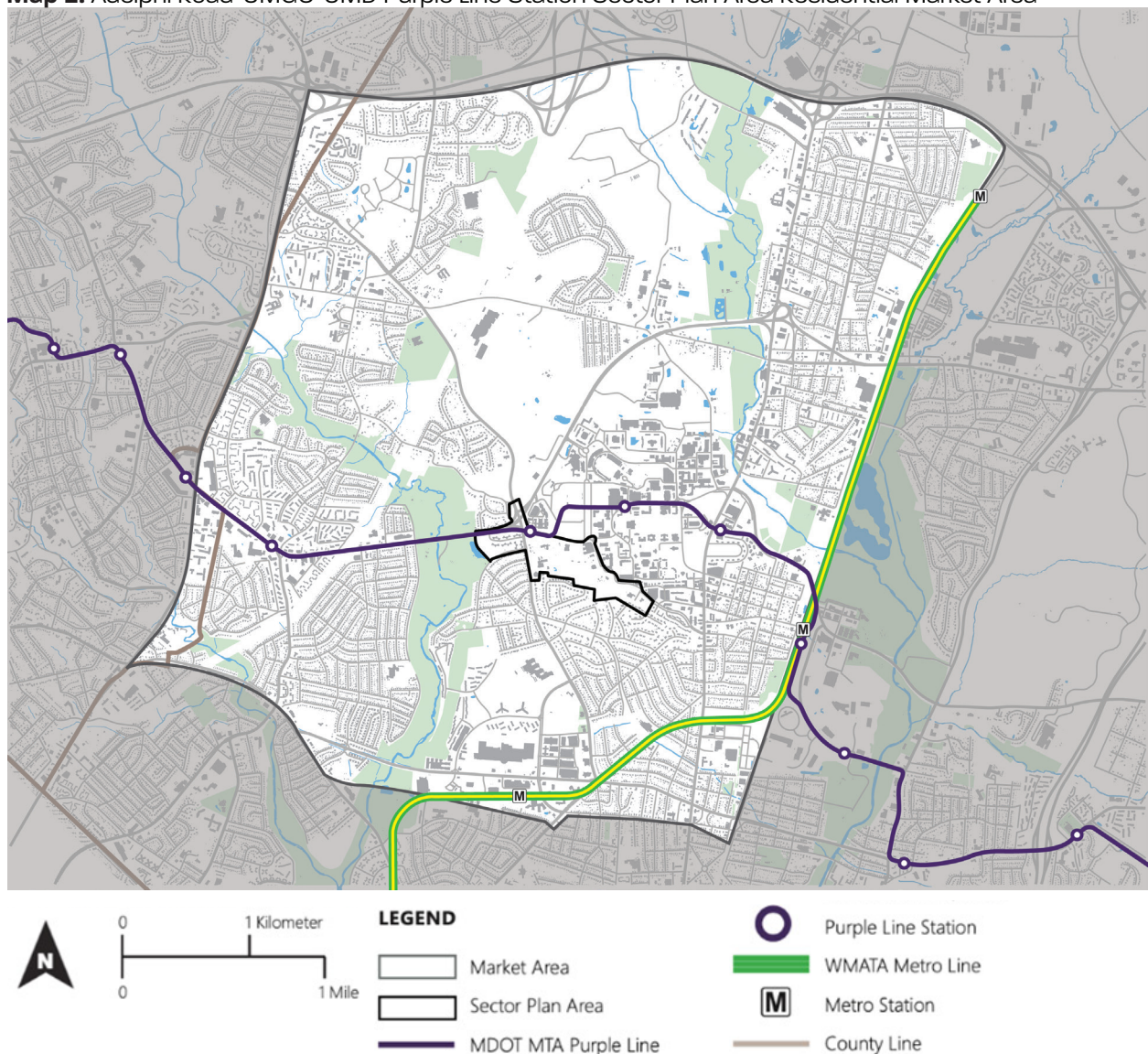
The potential for residential development in the Adelphi Road-UMGC-UMD Purple Line Station Sector Plan area depends on regional growth and residential demand associated with the new transit infrastructure of the Purple Line. Residential demand is directly related to the competitive offerings on campus and in neighboring communities. The Purple Line supplements the existing Metro (Green and Yellow Line) access at the Prince George's Plaza Station south of the study area, the Takoma-Langley

Transit Center bus hub, and the MARC commuter rail's Camden line that provides service from Baltimore to Washington's Union Station with a stop in Riverdale Park.

Housing Stock

The Sector Plan PMA incorporates many neighborhoods outside the City of College Park, including Adelphi, Calvert Hills, Riverdale Park, and University Park. The area's housing base includes 60.8

Map 2. Adelphi Road-UMGC-UMD Purple Line Station Sector Plan Area Residential Market Area



SOURCE: Prince George's County Planning Department, GIS Open Data Portal, 2021, <https://gisdata.pgplanning.org/opendata>; District of Columbia, Open Data DC, 2021, <https://opendata.dc.gov>; Maryland Department of Transportation, Maryland Transit Administration, 2021, <https://www.purplelinemd.com>.
Note: Full data citation available in Appendix B Map Citations.

percent of its units in single-family detached units, more than Prince George's County with 51.8 percent and more than College Park, which has 59 percent of its housing stock in single-family detached units. Larger multifamily housing (20 or more units per structure) in the PMA represents 17.2 percent of the housing stock and 27.6 percent in College Park in 2018, reflecting the greater presence of single-family housing west of the campus. It should be noted that some single-family homes have been divided into smaller rental housing alternatives for students. The PMA has a higher concentration of smaller multifamily units in structures of 10 to 49 units—486 units or 12.2 percent of the total stock.¹⁴

Nearly one-third of housing units in the PMA were built in the 1950s. The built-up nature of the PMA's existing neighborhoods leaves limited opportunity for new development; only 11.1 percent of the housing units (or 698 units) have been built since 2010 compared to 19 percent in the City of College Park.¹⁵ Stakeholder interviews revealed that many of the available parcels of land in the PMA are constrained by environmental issues, resulting in higher costs for new infill housing.

To understand residential market conditions, a broader residential market area bounded by MD 650 (New Hampshire Avenue) to the west, MD 410 (East West Highway) to the south, the CSX rail line to the east, and I-95 (Capital Beltway) to the north serves as the basis for the following trend analysis.

The Adelphi Road-UMGC-UMD Purple Line Station Area Sector Plan rental market serves students from UMD seeking off-campus options as well as university staff, younger couples, and singles. CoStar, a commercial real estate information company, reports 10,850 beds in 3,664 non-dormitory student housing units with an occupancy of 92.6 percent and 63 percent preleasing of the 762 units under construction (see Table 5). The university reports more than 4,900 student rooms on campus in 37 residence halls with 73 percent consisting of doubles (two beds) and 13 percent in triples (three beds per unit) and quads (four beds per unit).¹⁶

Overall, CoStar estimates the Sector Plan residential market area has 17,131 units of all types of non-

Table 6. Rental Units by Type

Unit status	Total units	Market units	Student housing	
			Units	Beds
Existing	17,131	13,467	3,664	10,850
Under Construction	1,893	1,214	679	762
Proposed	1,206	581	625	N/A
Subtotal	20,230	15,262	4,968	11,612
<i>Demolished</i>		101		

SOURCE: CoStar, accessed February, 2021; PES, 2021.

Table 7. Market Rate Rental Housing by Bedroom

Bedroom Size	Total Units	Average Rent	Average Square Feet	Average Rent Per Square Foot
Studio	618	\$1,164	508	\$2.26
One Bedroom	5,023	\$1,386	733	\$2.28
Two Bedrooms	5,488	\$1,674	934	\$1.84
Three Bedrooms	933	\$2,163	1,244	\$1.75
<i>Subtotal</i>	<i>12,062</i>			
<i>Total</i>	<i>13,467</i>	<i>\$ 1,533</i>	<i>843</i>	<i>\$1.90</i>

NOTE: CoStar does not provide bedroom breakdowns for all multi-family units.

SOURCE: CoStar, accessed February, 2021; PES, 2021.

dormitory housing and another 1,893 units under construction. CoStar's development pipeline suggests an additional 1,206 units slated for development in the near term (see Table 5). Affordable rent-subsidized housing units represent a small percentage (3.7 percent) of existing units with only 637 units in four properties.¹⁷

The majority of the multifamily units (50.5 percent) in the Sector Plan residential market area were built in the 1950s and 1960s. During the 1970s, 1980s, and 1990s, the area slowly added about 1,000 multifamily units to the housing stock each decade.¹⁸ Development of new rental housing began to increase rapidly over the past decade with the addition of 13 buildings with 3,746 units. Development activity has

¹⁴ See Appendix Table A9.

¹⁵ See Appendix Table A10.

¹⁶ 2017 UMD Student Housing Market Analysis Report, <http://reslife.umd.edu/marketstudy/>, accessed February 2021.

¹⁷ CoStar, Inc, www.costar.com, accessed January 2021.

¹⁸ See Appendix Table A11.

Table 8. Multifamily Housing Trends, 2010- 2020

Year	Total Buildings	Total units	Under Construction	Percent Vacant	Net Absorption	Average Square Feet	Rent per Unit	Rent per Square Foot
2010	56	9,995	-	7.1%	431	828	\$1,248	\$1.49
2011	56	9,995	-	7.2%	-10	828	\$1,270	\$1.52
2012	56	9,995	539	4.0%	318	828	\$1,306	\$1.56
2013	56	9,995	539	4.1%	-9	828	\$1,345	\$1.61
2014	58	10,534	-	5.2%	395	832	\$1,389	\$1.66
2015	58	10,534	235	3.8%	148	832	\$1,430	\$1.71
2016	59	10,769	275	5.4%	56	834	\$1,456	\$1.74
2017	59	10,769	956	5.4%	5	834	\$1,487	\$1.78
2018	59	11,019	943	5.8%	186	835	\$1,532	\$1.83
2019	62	11,962	850	6.2%	842	836	\$1,573	\$1.88
2020	62	11,962	1,214	6.0%	28	836	\$1,577	\$1.89
2009-2020 Change								
Number	6	1,967				8	\$329	\$0.40
Percent	9.7%	16.4%		-1.1%		1.0%	20.9%	21.2%

SOURCE: CoStar, accessed February 2021; Partners for Economic Solutions, 2021.

picked up significantly, due both to the area's growing appeal and a favorable financial climate for rental housing investments.

The multifamily housing stock—both market-rate and student—is dominated by one- and two-bedroom units, which represent 87 percent of all units. Three-bedroom units account for 8 percent of units, and studio units represent only 5 percent of the total. Smaller apartment units (mostly one-bedrooms) achieve the highest rents on a per-square-foot basis, generally averaging \$2.26 to \$2.28 per square foot or \$1,164 to \$1,386 per month depending on the unit size. Two-bedroom units are achieving average rents of \$1.84 per square foot, or \$1,674 per month. Three-bedroom units, typically designed for roommates, average 1,244 square feet and rent for \$1.75 per square foot or \$2,163 per month (see Table 6).

Occupancy information available from CoStar suggests that larger market-rate buildings (140 units or more) built in the past 10 years or with recent reinvestment achieve occupancy rates between 92.9 to 97.7 percent. The older apartments' occupancies range from 91.3 percent to 98.9 percent as of December 2020. Smaller buildings experience lower occupancy levels, averaging between 89 and 92 percent. Typically, 95 percent occupancy is considered healthy. The current occupancy rates are likely a

reflection of students attending classes from remote locations (see Table 7).

Over the past decade, the pace of residential rental development increased with the construction of eight new multifamily buildings totaling 2,350 units and three new student housing projects with 1,277 units that account for more than 3,900 student beds. The performance of these apartment complexes demonstrates the demand for newly constructed apartments, driven by an appetite for modern construction and amenities. Data combining both standard market-rate rental apartments and student housing indicate a healthy occupancy of 93.5 percent (see Table 7).

A closer review indicates that the recently constructed student housing built since 2015 maintains nearly full occupancy and pre-leases 79 percent of units multiple months in advance.¹⁹ Those newly built market-rate apartments within walking or cycling distance to the UMD campus tend to have healthier occupancy rates, averaging 93 percent as compared to 86 percent for those requiring a short bus ride or car trip to access campus.²⁰ Many students seek housing outside the residential market area, opting to drive to more affordable multifamily housing, skipping over the closer but still car-dependent apartment options. During the pandemic, students benefited from the

¹⁹ Stakeholder interviews, conducted in January-February 2021.

²⁰ CoStar, accessed February 2021.

reduced congestion on roadways and the virtual learning environment requiring few trips to campus.

Senior Housing

The evaluation of the competitive supply of senior housing options begins with an analysis of Countywide development, occupancy, and rent trends. Countywide, the 43 senior properties²¹ provide 5,319 units with an average of 727 square feet. Nineteen percent rent growth over the past decade has resulted in average rents of \$1,300 per unit. Six new developments have opened Countywide since 2010, adding 844 units of senior housing. The College Park residential market area has only one senior housing development—the rent-subsidized Spellman House Apartments at 4711 Berwyn House Road. The 141-unit high-rise built in 1982 includes 700-square-foot one-bedroom units on roughly three acres.

As would be expected, the senior housing available within Prince George's County remains well occupied with slight shifts in vacancy as new units become available.

For-Sale Residential

Data from Real Estate Business Information and Multiple Listing Service data (reported by Redfin.com) show for-sale real estate activity with the sale of 546 residential units in the PMA for February 2020 through January 2021. Overall, the average sales price reached \$395,000 for an average of 1,534 square feet. Two-thirds of the sales were detached single-family residential homes (360 units) compared with 9 percent attached single-family homes and one-quarter condominiums. These sales demonstrate a wide diversity in price, size, lot size, and amenities. Sales prices varied by unit size with higher prices generally associated with larger units.

A closer review of the sales indicates that the single-family detached homes had an average sales price of \$272 per square foot, compared to \$218 for townhouses and \$162 for condominiums. The condominiums sold averaged 951 square feet compared to 1,604 square feet for townhomes and 1,671 square feet for single-family detached units. It should be noted that the high number of students desiring convenient off-street parking on the western side of the university campus results in the sale of garage parking spaces with some spaces selling for \$5,000 to \$7,000.

²¹ CoStar Inc., www.costar.com, accessed February 2021.

²² Proposed developments include projects with submitted plans and announced projects that the market analyst deems are most likely to proceed to construction or are under construction.

Proposed Residential Developments²²

Several developments including residential, mixed-use, and commercial projects are proposed throughout the Adelphi Road-UMGC-UMD Purple Line Sector Plan Residential Market Area. The following summarizes the most relevant projects with key residential components. These projects include units under construction, approved, or seeking approvals:

- Gilbane Development has plans for three new developments in the area:
 - Atworth, a 451-unit rental building with ground-floor retail on WMATA's 5.6-acre parking lot at the College Park Metro station. Plans suggest studio, one bedroom, two bedroom, and three-bedroom units will be constructed.
 - Northgate will replace the former Burger King at 8430 and 8510 Baltimore Avenue, offering 296 residential apartments to be delivered in 2022.
 - Western Gateway (currently being planned), a public private partnership between UMD and Gilbane Development. This includes two parcels—7500 Mowatt Lane (owned by UMD that is approved for the Mosaic at Turtle Creek project in 2008 for 300 unit multifamily apartments), and 3623 Campus Drive (owned by GD Mowatt Townhomes LLC.). The current concept for this development plans to retain the previously approved 300 units within the UMD parcel, but as one-bedroom units for graduate students. In addition, it will incorporate 81 units for sale as townhouses on the other parcel owned by Gilbane. It is anticipated for delivery in August 2023.
- Under a partnership with Terrapin Development Company (TDC), Bozzuto plans to develop 393 residential apartments and 60,000 square feet of retail (including a small grocer) on the former Quality Inn and Plato's Diner site at 7200 Baltimore Avenue. Currently under construction, the project known as Southern Gateway should be completed by 2022.
- Greystar, a South Carolina-based student housing developer, continues to seek approvals for a nine-story, 343,000-square-foot, mixed-use building

along the 7400 block of Baltimore Avenue. The new 343 residential units will replace several long-time retailers such as Lotsa Pizza, Insomnia Cookies, and Krazi Kebob. Depending on the approval process, Greystar could commence construction by the summer of 2021. (Seeking approvals)

- The Boulevard at 9091, a new development outside the residential market area north of the Beltway, is another offering by Metropolitan Development Group. The new building would add 238 new residential units to the market with occupancy beginning in 2024. (Approved)
- The Station at Riverdale Park's new residential offerings include an initial set of 119 townhomes positioned as a smaller set of two-bedroom units with 1,848 to 1,873 square feet selling for \$447,490 and a slightly larger 2,069 to 2,097 square-foot two-bedroom unit home selling for \$477,490 by Stanley Martin. These new for-sale units located at the rail station's mixed-use community represent the initial phase as well as The Residences—a 225-multifamily unit project—is expected to be complete in February 2022. Both projects target the commuters as a primary residential audience. (Constructed)
- The Metropolitan @ College Park developed by Lennar incorporates 45 luxury townhomes at 4701 Cherokee Street as a new for-sale offering. The project has a flexible layout design allowing homebuyers to select either a three-bedroom home with two full baths and two half baths or a redesigned layout with up to five bedrooms. The project is planned for completion in 2021. (Constructed)

Data from CoStar and the UMD's on-campus housing evaluations suggest a shortfall of the existing student housing supply. CoStar accounts for roughly 10,850 beds in student housing apartments with an estimated 1,105 beds under construction. CoStar estimates that total dormitory capacity reached 12,536 beds on campus as of Spring 2021.²³ The UMD's Housing Strategic Plan Update completed in 2019 focuses on efforts to renovate and modernize existing space in on-campus dormitories but estimates a 1,650-bed gap in supply relative to demand. Large portions of the existing dormitory space may require long-term replacement.

²³ CoStar Inc., www.costar.com, accessed February 2021.

Residential Demand

Demand for new residential development relates to the projected growth in households and turnover among existing renters. The Adelphi Road-UMGC-UMD Purple Line Station Area Sector Plan area offers a competitive location for new residential development given the presence of UMD and UMGC, heavy investment in transit infrastructure with the introduction of the Purple Line, and projected employment growth.

Over the mid- to long-term future, UMD growth, worsening traffic congestion, the introduction of the Purple Line, and changing preferences for short commutes are likely to support continued strong demand for infill housing in the Sector Plan area and surrounding neighborhoods. The vibrancy of neighborhoods with convenient access to public transportation as well as walkable, amenity-filled urban environments demonstrates the potential for modern multifamily housing already prevalent along US 1 (Baltimore Avenue) in College Park. The introduction of the Purple Line will further increase the potential for the Sector Plan area to add more housing, well beyond the conservative projections. New households will be attracted by the easy access to campus, the US 1 retail and entertainment areas, Downtown Silver Spring, and Downtown Bethesda provided by the Purple Line.

MWCOG projects that Prince George's County will add roughly 21,000 new households by 2030 and a total of almost 36,000 households by 2040. The MWCOG household projections for the Adelphi Road-UMGC-UMD Purple Line Station Area Sector Plan area are overly conservative with most University-related growth occurring outside the Sector Plan area. Heavily influenced by recent development trends, known development projects already in the approval pipeline, and consideration of the availability of sites, these projections do not fully account for the market appeal that will be generated by the new Purple Line access; therefore, the MWCOG projections should not constrain the Sector Plan.

Target Markets

The following analysis of the residential market suggests several potential types of customers who might be attracted to live in the area.

Any residential development in the Adelphi Road-UMGC-UMD Purple Line Station Area Sector Plan

Table 9. Supportable Rents for Market-Rate Apartments

Unit Type	Square Feet	Mix	Rent Per Sq Ft	Monthly Rents
Rental Apartments				
Studio	600 - 650	25%	\$2.95 - \$3.10	\$1,860 - \$1,920
1 Bedroom	750 - 825	20%	\$2.65 - \$2.70	\$2,030 - \$2,190
2 Bedroom	1,000 - 1,100	25%	\$2.45 - \$2.55	\$2,550 - \$2,700
3 Bedroom	1,175 - 1,250	30%	\$2.35 - \$2.45	\$2,880 - \$2,940
Rental Townhouses				
2 Bedroom	1,500 - 1,650	60%	\$2.40 - \$2.50	\$3,750 - \$4,130
3 Bedroom	1,750 - 1,900	40%	\$2.40 - \$2.45	\$4,290 - \$4,560

SOURCE: Partners for Economic Solutions, 2021.

area offers an opportunity to live near UMD and within a short drive or transit connection from Washington, D.C. The location relative to major traffic corridors such as MD 193 (University Boulevard), US 1 (Baltimore Avenue), MD 650 (New Hampshire Avenue), MD 410 (East West Highway), and I-495 (Capital Beltway) allows good access in and out of the area, contributing to its residential appeal.

UNIVERSITY-RELATED MARKET

The presence of UMD generates a demand for off-campus housing alternatives for full-time students. Additional demand will come from faculty and staff at UMD and UMGC. UMD alumni may also be attracted to retirement living in the Adelphi Road station area.

Full-time students attending UMD grew from 31,936 in 2010 to more than 36,000 students in the past decade, a 12.9 percent increase, based on data provided UMD's Division of Research.²⁴ During this period, full-time undergraduate enrollment increased 15.2 percent to 28,610 students. Full-time graduate enrollment increased by roughly 1,000 students from 2010 to 2015 and then declined slightly to 7,460 students enrolled in the fall of 2020, partly because of visa restrictions affecting international students. Enrollment projections suggest the same level of growth over the next five years with the addition of 4,489 new students including an 11.3 percent increase in full-time undergraduates at UMD.

UMD supports a larger number of graduate and post-doctoral students, with roughly 7,500 full-time graduate students and another 132 virtually at UMGC. Of these, approximately 4,000 graduate assistants work on the UMD campus. This market segment represents more mature households with different

housing preferences than undergraduates have. Many of these households still receive assistance from parents to pay for a quality rental environment and live with fewer roommates. This segment could benefit particularly from sites with immediate adjacencies to the Purple Line and within walking distance of campus.

International students have shown a greater propensity to live near campus in part because of their lack of familiarity with other housing options and because of their greater reliance on public transit. A recent survey by the Student Experience in the Research University Consortium suggests that roughly 60 percent of international students have sufficient financial resources to live in newly built housing. The Sector Plan area could capture roughly three-quarters of these students. Non-international graduate students are often much more cost-sensitive; an estimated 20 percent are able to afford the rents in newly developed housing. With new housing in the Sector Plan area capturing 75 percent of the international graduate student demand and 50 percent of the non-international demand, graduate students could support 1,040 rental apartments.

Full-time undergraduates at UMD totaled 28,610 in 2020 and are projected by the university to increase to 31,830 by 2025. International students numbered 745 in 2020, down from 1,051 in 2018. An estimated 10,850 undergraduates live on campus in university housing; off-campus student housing has expanded in recent years.²⁵ An additional 2,104 units of student housing are under construction offering more than 3,100 new beds.²⁶ New housing in the Sector Plan area would be most competitive for international students, potentially supporting 130 beds or 90 units.

²⁴ University of Maryland IRIS, <https://www.usmd.edu/IRIS/>, accessed February 2021.

²⁵ CoStar, www.costar.com, accessed February 2021.

²⁶ CoStar, www.costar.com, accessed February 2021.

The market for rental housing also includes the university's large base of faculty and professional staff, some of which could be attracted by new quality rental and for-sale communities proximate to the university. Households with one member employed by the university and another commuting to a job elsewhere in Prince George's County, Montgomery County, or the District of Columbia would find a Purple Line station area location particularly appealing. There is a limited supply of high-end multifamily residential offerings throughout the area for faculty and staff. When offered an appropriate unit near their work, new market segments will be attracted to the area seeking a housing option that will diminish their reliance on the automobile and provide a unique quality of life based on the community's amenities and features.

UMD and UMGC had a combined count of 15,577 faculty and professional staff in 2020.²⁷ Many of these administrative and faculty positions pay in excess of \$85,000 annually for more seasoned staff, resulting in higher income households with a larger number of households seeking ownership opportunities. An estimated 8,200 faculty/staff households have high enough incomes to afford new housing, adjusted 10 percent for households that include two members of the university faculty or staff.²⁸ One-quarter of those households rent their housing. The Adelphi Road-UMGC-UMD Purple Line Station Area Sector Plan area could attract 30 percent of these faculty and staff households, supporting 630 new rental units to 2045.

The parking demand associated with residential buildings varies based on the year of construction. In general, the area's recently built multifamily developments offer parking ratios of 1.0 to 1.3 spaces per unit. The Domain at College Park development located on campus and other new developments near Metro stations have somewhat lower parking ratios of roughly 0.8 spaces per unit.²⁹

The faculty and staff will generate demand for ownership units as well. PES estimates 75 percent of households with a university faculty or staff member own their homes with roughly 2 percent moving annually. If the Sector Plan were to capture 15 percent of those current households moving each year and 10 percent of the university's new hires, it could support sale of 550 townhouses and/or condominiums to 2045.

Table 10. Recommended Mix for Senior Independent Living Development

Unit Type	Square Feet	Mix
1 Bedroom	900 - 1,075	20%
2 Bedroom	1,150 - 1,250	65%
Townhouse - 3 Bedroom	1,325 - 1,400	15%

SOURCE: Partners for Economic Solutions, 2021.

Senior Housing

Age-restricted developments in the Sector Plan area could attract active seniors interested in downsizing from their homes, including University of Maryland alumni and current and retired staff and faculty.

Seniors typically seek new housing options because of changes in their health, specific family needs, or simply a desire to free themselves from home maintenance chores. They may prefer the ability to lock the door and travel without concerns about their home's security. Many also seek to diminish their reliance on the automobile and desire a quality of life based on the amenities and features of a vibrant neighborhood. While not all seniors aspire to live in more urban conditions, a fair number of the local baby boomers born between 1946 and 1964 will prefer the Adelphi Road-UMGC-UMD Purple Line Station Area Sector Plan sites with easy access to the Purple Line station. These seniors desire single-level living, abundant natural light, views, the potential to customize the design and home features, and proximity to restaurants and entertainment.

The area will appeal most strongly to active adults seeking independent living opportunities in individual housing units that include a kitchen. While most offer common areas and programming to encourage residents to stay active and engaged, most do not offer communal meal service or individual health care. Independent living differs from assisted living, which provides housing and supportive services for seniors unable to independently manage daily living activities, and skilled nursing facilities, which provide 24-hour medical care and assistance.

There is little to no supply for this market segment.

²⁷ University of Maryland IRIS, <https://www.usmd.edu/IRIS/>, accessed February 2021.

²⁸ Partners for Economic Solutions estimates.

²⁹ CoStar, Inc., www.costar.com, accessed February 2021. Stakeholder interviews with apartment managers conducted February–March 2021.

SENIOR LIVING AT UNIVERSITIES



ISTOCK PHOTO

Establishing a relationship with the nearby university to offer an opportunity for lifelong learning creates a marketing advantage that has attracted many institutional investors interested in retirement communities. These retirement communities include many options from large-scale campuses with separate buildings with a range of levels from independent living, assisted living and memory care units. Recent shifts in the market indicate that university-based retirement communities create viable options for joint partnership. The following examples profile different university-based retirement communities:

- Lasell College in Newton, Massachusetts offers independent living facility with 225 residential units in 16 interconnected buildings. Lasell Village residents develop specified learning plans and meet annual goals for hours invested in education, all based in the Fuss Center for Research on Aging and Intergenerational Studies. Amenities include an indoor lap pool, communal classroom and library, ballroom, art and dance studios, raised-bed gardening and potting room. One-bedroom apartments range in size from 640 to 1,080 square feet with two-bedroom units offering 875 to 1,933 square feet of space.
- Purchase College in New York created 220

units of independent living, Broadview Senior Living, with 174 one- and two-bedroom units with underground parking and 46 two-bedroom townhouses with two-car garages. The partnership between the State of New York and Life Care Services and Senior Care Development constructed Broadview Senior Living on 40 of 500 acres of state-owned land. Plans allow for the addition of another 165 units with more services, including the potential for a memory care unit.

- Holy Cross Village at Notre Dame partnered with Greystone Communities to construct a four-story independent living apartment building with 96 units as one component of a larger continuum of care campus adjacent to Holy Cross College in Notre Dame, Indiana.
- Mirabella at Arizona State University opened in December of 2020 as a 20-story, 613,992-square-foot apartment building. The building consists of 246 independent living apartments ranging from 750 to 2,665 square feet. The remaining 52 continuum of care units consist of 11 assisted-living apartments, 20 memory-care suites and 21 skilled-nursing units. The project includes several high-value amenities including an indoor pool, wellness center, game rooms, dog park, event and lecture hall, physical therapy gym, four restaurants and a theater.

Empty nesters tend to prefer larger two- and even three-bedroom units to accommodate their existing furniture and frequent guests. These apartment buildings typically provide more common space with unique experiences for resident interaction. The best mix of floor plans given current demographic trends, prevailing household incomes and neighborhood attributes unique to the Sector Plan community suggests predominantly two- and three-bedroom units with 1,500 to 2,000 square feet for senior rental and for-sale options. Parking should be provided at an average of 1.0 space per unit. Though single-level living is generally preferred, some of the younger seniors may prefer townhouses or stacked townhouses (two stories over two) with exterior maintenance handled for a fee by a condominium association.

Quantifying demand requires evaluating the local market as well as the unique appeal a development in the Sector Plan area could hold for University of Maryland alumni. For the senior housing demand, households with heads aged 55 to 74 years were segmented to focus on those earning between \$50,000 and \$99,999 as the prime local audience for independent living rental alternatives. The 19,227 Prince George's County senior renter households move infrequently and include a large group of low-income seniors. Controlling for the share of senior households seeking to move (roughly 2.5 percent annually) and able to afford newly constructed market-rate senior housing (one-quarter of senior households) results in 140 senior households that could be termed as "qualified renter households" annually.

While these seniors may be able to afford monthly rents, many do not move in any particular year and will consider competitive locations as well as the Sector Plan area. However, it is important to note that the production of independent senior living in the County does not meet the demand. The appeal of areas with nearby transit, retail, entertainment, and other amenities suggests a higher-than-average capture rate for the Adelphi Road-UMGC-UMD Purple Line Station Area Sector Plan area with annual demand of 45 units.

In addition to the existing renter households, a portion of existing senior homeowners may be willing to downsize their current homes and move into modern senior rental facilities. Those senior owner households must earn incomes of \$75,000 or more. It

Table 11. Market-Rate Residential Demand Potential, 2020-2045

	Supportable Market-Rate Development	
	Percent	Units
Rental Residential		
Apartments	85%	1,500
Townhouses	15%	260
Total Rental Demand	100%	1,760
For-Sale Residential		
Condominiums	35%	190
Townhouses	65%	360
Total Owner Demand	100%	550
Senior Independent Living		
Apartments	85%	260
Townhouses	15%	40
Total Senior Living Demand	100%	300
Total Residential		
Total Demand		2,610

NOTE: These demand estimates exclude opportunities for dormitories and affordable housing.
SOURCE: Partners for Economic Solutions, 2021.

is likely the option may be attractive to only a limited number (30 to 35 units) of households.

UMD alumni represent a potential source of demand for rental and for-sale housing options. The UMD alumni community consists of 388,000 active alumni, with 166,200 alumni living in Maryland, northern Virginia, and the District of Columbia, as well as roughly 27,500 living outside the area. The out-of-area active alumni include a large group of 10,000 Philadelphia-area alumni as well as another 5,000 in northern New Jersey.

Several major universities now offer affiliated senior housing to their alumni. Programming for lifetime learning and cooperative living opportunities entice alumni to purchase or rent apartments in these university-affiliated communities.

Over the mid- to long-term, the area could support an independent living development of 125 to 175 units. With the addition of a formal affiliation with the university and an expanded amenity base to include lectures, classes and other lifelong learning

opportunities, the experience of other major universities suggests that the development could be larger with 200 to 300 senior independent living units.

Market-Rate Housing Potentials

The Adelphi Road-UMGC-UMD Purple Line Station Area Sector Plan area could attract demand for 1,760 rental units, 550 for-sale housing units, and up to 300 senior independent living units by 2045. However, the limited availability of large sites and existing environmental constraints may constrain the area's ability to achieve these potentials. These demand estimates focus on market-rate potentials. Opportunities for additional specialized development—dormitories, affordable housing and senior housing—are explored in the following discussion.

Affordable Rental Housing

The supply of affordable rental units in the Adelphi Road-UMGC-UMD Purple Line Station Area Sector Plan Residential Market Area is limited relative to the demand. Housing affordability data for market area households identify a significant need for additional affordable housing, mirroring the regional need for affordable housing. The U.S. Department of Housing and Urban Development defines affordable rental housing as a household spending no more than

30 percent of its income for gross rent (including utilities). Within the Residential Market Area, an estimated 42 percent of households spent 50 percent or more of their income for rent during the 2016-2018 period. These severely cost-burdened households could benefit from access to more affordable rental housing alternatives.

Private developments built with Low-Income Housing Tax Credits, the key federal mechanism for funding affordable housing construction, typically offer rents affordable to households with incomes at 60 percent of the Median Family Income, or roughly \$65,000 to \$76,000 for a family of two to three persons.

The amount of affordable housing that can be feasibly built in the corridor will depend on the availability of financial resources.

Dormitories

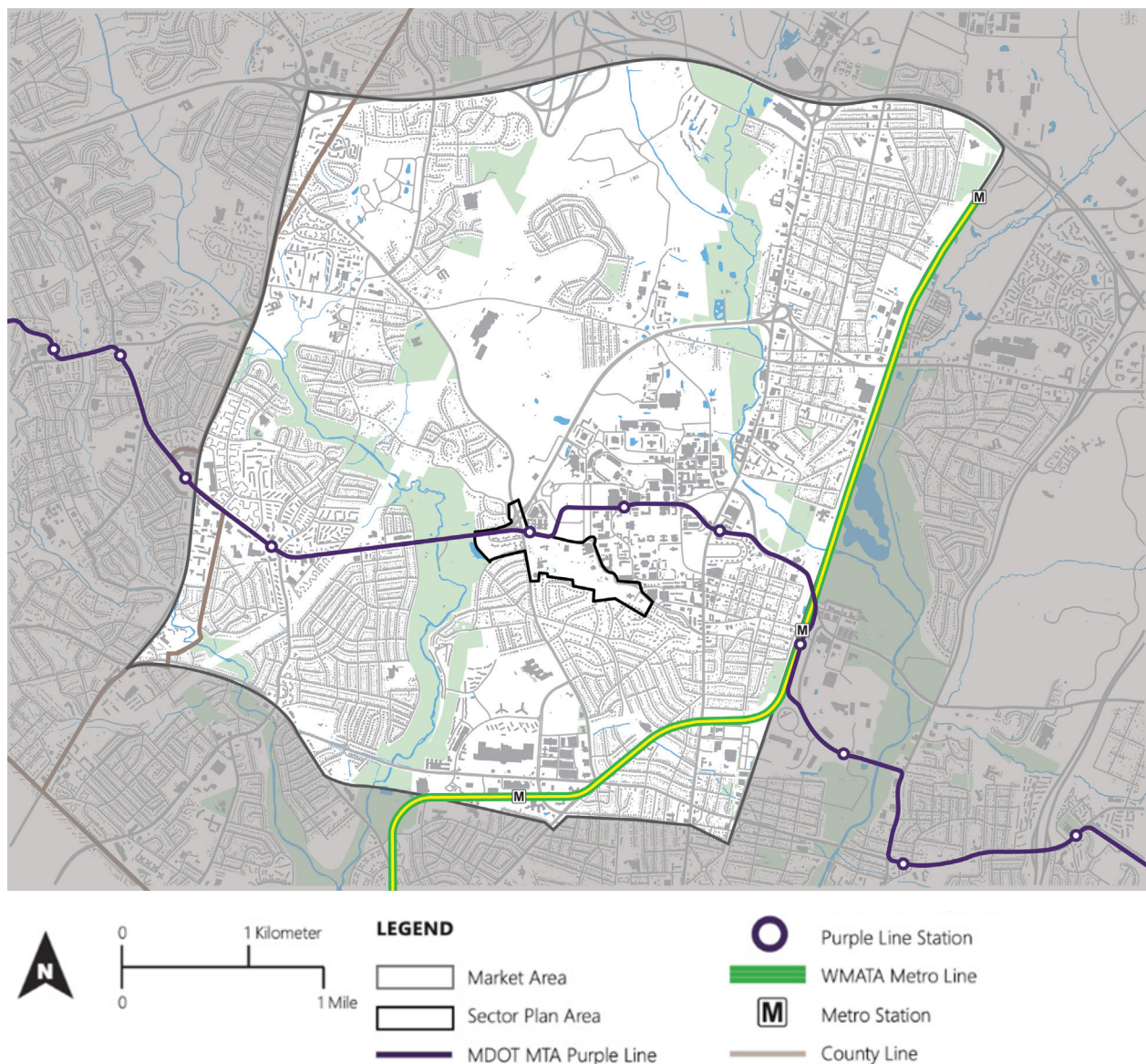
UMD is facing a shortage of on-campus housing relative to demand; however, funding constraints limit its ability to remedy that need. Over the next 25 years, the university may seek to build additional dormitories or graduate-student housing. The extent and timing of that development depends on funding availability and university priorities rather than on market demand. This would represent additional development potential beyond that identified in the preceding market analysis.

Office

Office markets rarely consist of one type of office space; rather, distinct users create space needs, which vary greatly in character and construction type, impacting rents and location. Industries that use office space most heavily include information; finance and insurance; professional, scientific, and technical services; health care and social assistance; other services; and government. Typically, the first three are most important for the general office market

occupancy. The initial economic and demographic outlook highlighted the potential drivers for office space including activity at UMD, government offices, and for neighborhood-serving office users that value proximity to the residential customer base. The majority of these office users seek space in mixed-use environments with multiple modes of transit access and visibility.

Map 3. Adelphi Road Sector Plan Area Office Market Area



SOURCE: Prince George's County Planning Department, GIS Open Data Portal, 2021, <https://gisdata.pgplanning.org/opendata>; District of Columbia, Open Data DC, 2021, <https://opendata.dc.gov>; Maryland Department of Transportation, Maryland Transit Administration, 2021, <https://www.purplelinemd.com>.
Note: Full data citation available in Appendix B Map Citations.

Historical trends for office occupancy along with direct information from area brokers and office developers and university officials helped provide insight into the amount of demand anticipated in the near- and long-term.³⁰

Office Conditions

Metropolitan Washington, D.C. region's office market reflects the presence of the federal government as the key stabilizing factor that generates demand from the government and private contractor office space as well as supportive office users requiring nearby offices. Over the course of the past decade, government employment growth flattened and the federal government shifted its office use priorities to reduce the federal footprint, emphasize government-owned space, and target infrastructure-rich locations (particularly those with transit access as well as vehicular traffic). In Prince George's County, the total inventory of roughly 27.4 million square feet of office space houses government agencies, contractors, health care, neighborhood-serving businesses targeting the local residential customer base, and research and development office space anchored by UMD and other institutions.³¹

The Adelphi Road-UMGC-UMD Purple Line Station Area Sector Plan office submarket consists of 2.175 million square feet of office space including general office space, neighborhood-serving office space, and office space in nontraditional buildings such as retail centers.³² One-third of the office space was constructed prior to the 1970s, with roughly 500,000 square feet constructed in the 1970s and again in the 1980s. As a result, the majority of the office space in the Sector Plan office submarket is in older structures. The College Park office submarket has an inventory of 4.7 million square feet of general market office space in commercial buildings along major thoroughfares—US 1 (Baltimore Avenue) and MD 193 (Greenbelt Road)—and in traditional business parks with access and visibility from I-95 (Capital Beltway).

The Sector Plan office market showed significant absorption in 2011 and 2015 followed by a major loss in 2018 that reduced the occupancy rate to 83.0 percent. Despite the impacts of the COVID-19 pandemic, office occupancy improved slightly to 83.2

Figure 1. Adelphi Road- UMGC – UMD Purple Line Station Area Office Submarket

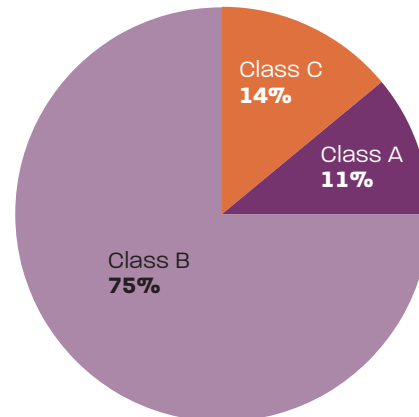
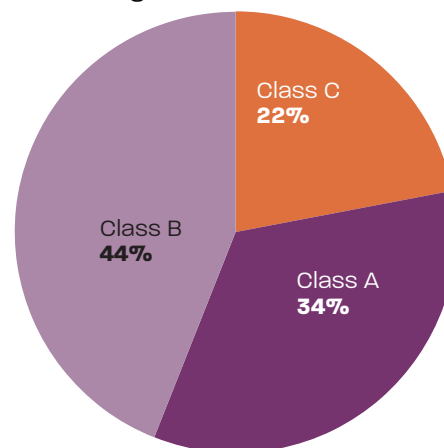


Figure 2. College Park Office Submarket



percent by the end of 2020. The Sector Plan area has seen virtually no new construction since 2007.³³

Prince George's County office space consists of 27.3 million square feet in roughly 1,180 buildings with an overall vacancy rate of 13.7 percent. The County has seen its vacancy rate decline from a high of 17.0 percent in 2014. Traditional office markets with a healthy balance between supply and demand have an 8 to 10 percent vacancy rate. In contrast, the Sector Plan office submarket continues to struggle with vacancy rates climbing from 8.3 percent in 2017 to 16.8 percent at the end of 2020, compared to 12.7 percent in College Park submarket. The office market

³⁰ CoStar, Inc., www.costar.com, accessed March 2021.

³¹ CoStar, Inc., www.costar.com, accessed March 2021.

³² CoStar, Inc., www.costar.com, accessed March 2021.

³³ CoStar, Inc., www.costar.com, accessed March 2021. Stakeholder interviews with area real estate brokers conducted February- March 2021.

experienced negative absorption (a decrease in the amount of occupied space) of an average 41,400 square feet annually over the past four years (2017 to 2020). No new office space has been constructed in the area since 2009. As would be expected, this office market caters to medical office buildings and neighborhood-serving office space; it suffers because of an overbuilt metropolitan area office market and an oversupply of Class B and C office space. Office spaces rent for \$21 to \$24 per square foot on average. These modest rents would not support the costs of new building construction at this time. In comparison, the Prince George's County office market absorbed an annual average of 178,000 square feet of space during the same four-year period. The College Park submarket added 111,276 square feet of new space in 2020 on the University of Maryland research park property, Discovery District.³⁴

Classing of commercial space helps to properly evaluate existing supply by differentiating buildings by physical condition and operating performance. Class A represents the newest buildings with high-quality finishes that command the highest rents, and Class C represents those older properties in average condition receiving lower than average rents, often in secondary locations. Within the Sector Plan office submarket, three-fourths of the existing inventory is Class B space representing 1.6 million square feet in 34 buildings with another 14 percent of space in 40 Class C buildings. The Class A inventory in the submarket represents two built-to-suit properties with 246,896 square feet of office space in the University Town Center development near the Prince George's Plaza Metro station. In contrast, the much larger College Park submarket, which minimally overlaps sections of the Sector Plan office submarket, consists of 34 percent Class A space in 11 buildings with 1.6 million square feet. In the College Park submarket, another 53 Class B buildings have 2.1 million square feet.³⁵

As might be expected, vacancies by classification of office space show differences in the performance of existing office assets. Class B office space in the Sector Plan submarket has the highest vacancy rate at 19.1 percent compared to the Class C vacancy rate of 14.4 percent. College Park's Class C office space has

a 7.3 percent vacancy rate reflecting the demand for affordable spaces and limited tenant turnover near UMD. The Class A office inventory remains stable with a vacancy of roughly 6.4 percent for the Sector Plan submarket and 11.1 percent for the broader College Park office submarket.³⁶

More than half of the existing office buildings in the Adelphi Road-UMGC-UMD Station Area Sector Plan office submarket area is in smaller buildings with less than 10,000 square feet of space; 34.2 percent of all office buildings in the submarket are even smaller with less than 5,000 square feet.³⁷

Office market supply and demand conditions do not reflect a singular type of office space; rather, tenants vary space use depending on availability and price point.

With overall vacancies at 16.8 percent in 2020 for the Adelphi Road Sector Plan submarket, conditions are better in the College Park submarket with 12.7 percent vacancy.³⁸ The one major reinvestment in the Sector Plan submarket occurred in the southern section with a 2005 renovation of the 420,000 square-foot office complex at 6525 Belcrest Road in University Town Center. The College Park submarket has benefited from the continued development of the University of Maryland research park, Discovery District, and reinvestment along the US 1 (Baltimore Avenue) corridor, which has included demolition of obsolete office space.

Office Demand

Until net absorption reduces the supply of vacant space and rents increase significantly, the Sector Plan submarket can expect limited development of new office facilities, though some build-to-suit activity associated with UMD may occur periodically.

Part of the explanation for the relatively slow pace of office absorption in the region relates to the changing ways in which companies are using office space. With advances in technology, it is much simpler for employees to work remotely, spending less time and requiring less space in the office. Changes in office design to open floor plans have greatly increased the efficiency of office space use with a significant decline in the square footage required per employee. Thus,

³⁴ Terrapin Development, <https://www.terrapindevelopment.com>, accessed February 2021.

³⁵ CoStar, Inc., www.costar.com, accessed February 2021.

³⁶ CoStar, Inc., www.costar.com, accessed February 2021.

³⁷ CoStar, Inc., www.costar.com, accessed February 2021.

³⁸ CoStar, Inc., www.costar.com, accessed March 2021.

economic growth that generates employment gains need not generate a net increase in the amount of office space used, though it may generate demand for new spaces designed for open floor plan operations.

Worker shortages with specialized technical skills and security clearances have shifted the balance of power in favor of workers. As companies compete to attract and retain talented workers, they are increasingly looking to the quality of the workplace to help them in that competition. Younger workers have expressed preferences for mixed-use environments that allow them to walk, bike, or take transit to work and to be able to eat and shop nearby.

The university offers a substantial cluster of students, particularly graduate students with advanced technology skills, which could help drive business demand for office space. The University of Maryland's Research Park (Discovery District) located on 150 acres from US 1 (Baltimore Avenue) to River Road, east of the College Park Metro station and surrounding the Riverdale Park North-UMD Purple Line Station is planned for an estimated 2.8 to 3 million or more square feet of space. This research park will absorb the majority of new office development associated with UMD's research and development activity and associated spin-off. The Discovery District incorporates approximately 60 acres of phased development by Corporate Office Properties Trust with existing buildings totaling 1.3 million square feet of space as of 2020. The recently completed four-story building at 4600 River Road will be anchored by the expansion of Cybrary, a technology education firm relocating from elsewhere in the university research park. The Sector Plan area cannot expect to compete successfully for

significant blocks of new university-related office space in the near-term as the university is focused on the successful leasing of the current and proposed research park facilities. In the mid- to long-term the university may seek to enhance the Adelphi Road gateway leading to new demand for office space near the station.

Another segment of office leasing activity will be businesses upgrading to more efficient space, particularly in mixed-use, transit-oriented environments that will help attract young workers. The Sector Plan area may be able to compete with other locations based on the presence of the new transit infrastructure and its natural gateway position at the intersection of Adelphi Road and MD 193 (University Boulevard). However, it will not be as competitive as sites along US 1 (Baltimore Avenue) with better access to retail, entertainment, and housing. Those sites with immediate adjacency to the station and/or high visibility from MD 193 (University Boulevard) will be in the best position to leverage the public infrastructure investment and the connectivity it provides to the campus. Other properties outside the immediate station vicinity will have limited office potential, possibly attracting small neighborhood-serving office spaces such as medical office buildings.

While the market recovers from an overhang of existing vacant office space, there is no indication of unmet demand for large-scale speculative office development outside the University of Maryland's Discovery District. In the Adelphi Road-UMGC-UMD Purple Line Station Area Sector Plan area, office potential is likely limited to less than 25,000 square feet of office space other than what might be needed by the university in the long-term.

Retail

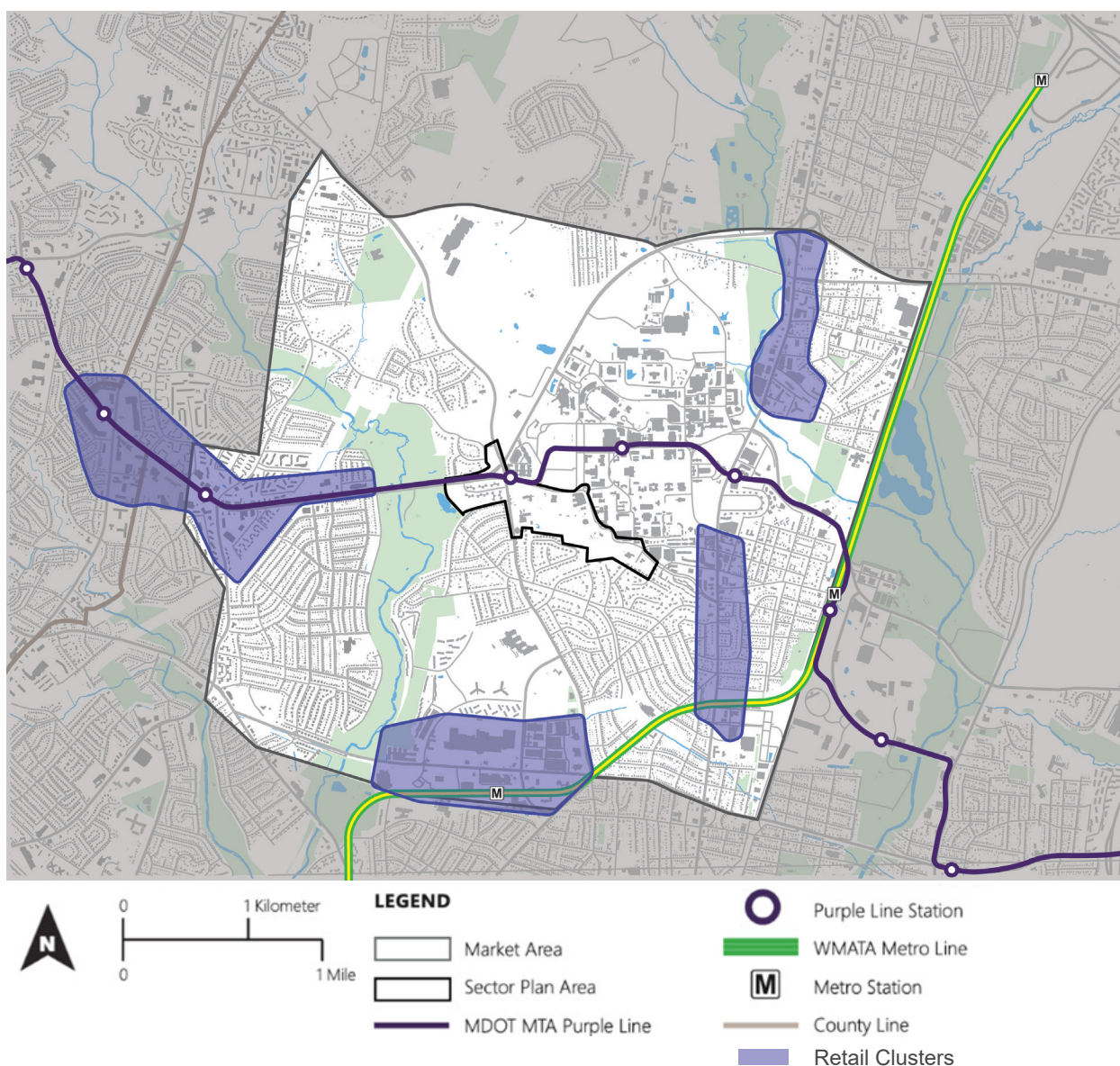
The analysis of retail potential at the Adelphi Road-UMGC-UMD Purple Line Station Area Sector Plan area relies on comparison of the spending of area residents, students, faculty, and staff to the sales of existing businesses for different types of retail goods and services. Also important is the impact of emerging trends including e-commerce and shifting retail experiential preferences.

Retail Conditions

The retail market in which the Adelphi Road Sector Plan area competes is characterized by four distinct clusters of competitive off-campus retail supply:

1. US 1 (Baltimore Avenue) North
2. US 1 (Baltimore Avenue) South from College Avenue south to Riverdale

Map 4. Adelphi Road Sector Plan Area Retail Market Area



SOURCE: Prince George's County Planning Department, GIS Open Data Portal, 2021, <https://gisdata.pgplanning.org/opendata>; District of Columbia, Open Data DC, 2021, <https://opendata.dc.gov>; Maryland Department of Transportation, Maryland Transit Administration, 2021, <https://www.purplelinemd.com>.
Note: Full data citation available in Appendix B Map Citations.

Table 12. Retail Inventory By Year Built and Cluster

	Retail Market Area		Route 1 North		Route 1 South		The Mall at Prince George's		University/New Hampshire/Riggs	
	Sq Ft	Percent	Sq Ft	Percent	Sq Ft	Percent	Sq Ft	Percent	Sq Ft	Percent
Prior to 1960	1,197,004	40.5%	62,371	28.6%	180,700	45.0%	697,868	48.4%	468,345	38.6%
1960s	223,477	7.6%	41,205	18.9%	37,971	9.5%	7,055	0.5%	242,350	20.0%
1970s	220,358	7.5%	49,279	22.6%	5,571	1.4%	-	0.0%	247,095	20.3%
1980s	45,462	1.5%	4,268	2.0%	-	0.0%	-	0.0%	144,942	11.9%
1990s	75,673	2.6%	-	0.0%	-	0.0%	32,581	2.3%	51,707	4.3%
2000s	575,654	19.5%	-	0.0%	13,600	3.4%	559,114	38.8%	45,000	3.7%
2010s	618,902	20.9%	61,185	28.0%	163,843	40.8%	144,337	10.0%	15,064	1.2%
Total	2,956,530	100.0%	218,308	100.0%	401,685	100.0%	1,440,955	100.0%	1,214,503	100.0%
<i>Vacancy Rate</i>	<i>7.6%</i>		<i>9.7%</i>		<i>5.0%</i>		<i>11.9%</i>		<i>4.2%</i>	

NOTE: CoStar does not provide year built data for all retail space.

SOURCE: CoStar, accessed March 2021; Partners for Economic Solutions, 2021.

3. The Mall at Prince George's along MD 410 (East West Highway) from Adelphi Road to Toledo Terrace
4. MD 193 (University Boulevard) / MD 650 (New Hampshire Avenue) / MD 212 (Riggs Road)

In addition, the area has smaller concentrations of commercial space on the ground floor of newly constructed student and market-rate apartments and in single-family houses converted to neighborhood business service and retail operations.

To understand the retail market conditions, a broader retail market area has been defined. It is bounded by MD 193 (University Boulevard) and Metzerott Road to the north, MD 212 (Riggs Road) to the west, MD 410 (East West Highway) to the south, and the CSX rail line to the east. Overall, the retail market area contains 3.1 million square feet of retail space in shopping centers and stand-alone offerings with a relatively healthy vacancy rate of 7.6 percent. A 5 to 7 percent vacancy rate is considered healthy for retail clusters; many commercial corridors of similar vintage have much higher vacancy rates.

CoStar classifies retail spaces by assessing their condition, quality, location, and ability to meet modern retailer needs. In the Sector Plan retail market area, 58.9 percent or 1,839,000 square feet of the space is classified as Class B and 25.2 percent or 788,000 square feet is Class C.³⁹ The Class A retail space represents space constructed since 2005

including one project, Southern Gateway, currently under construction. Occupancy data show that the 494,000 square feet of Class A retail space has a healthy vacancy rate of 5.2 percent. The lower-rent Class C space has maintained a vacancy rate of 5.1 percent over the past year during the COVID-19 pandemic. From 2014 to 2019, vacancy rates for the Class C space averaged 3.2 percent. Class B retail space within the area had an average vacancy rate of 2.1 percent during the same period. The increased vacancy rates highlight the impact of the pandemic and recent changes in the retail market.

The performance of many retail shopping centers and space within the Adelphi Road-UMGC-UMD Purple Line Station Area Sector Plan retail market area reflects the age of construction and recent investment or lack of investment to modernize the space. More than 40 percent of the existing retail space was constructed before 1960. For both the US 1 North and UniversityBoulevard/New Hampshire Avenue/Riggs Road clusters, the distribution of space spans the 1960s and 1970s as well as a large portion built prior to 1960.

Commercial shopping centers of all sizes, many with large anchor tenants, focus the retail activity within each of these retail clusters. Along the US 1 corridor, two distinct clusters other than the Beltway-focused retail node provide entertainment, dining, and night life for area residents and University of Maryland students, faculty, and staff. In 2019, Lidl's opened a

³⁹ CoStar, www.costar.com, accessed March 2021.

new 36,000 square-foot grocery store a few blocks south of MD 193 (University Boulevard). The US 1 South cluster stretches from College Avenue south to Underwood Street, capturing the activity at Riverdale Park Center (built in 2018), anchored by Whole Foods and Burton's restaurant. The Mall at Prince George's is a super-regional center with almost 700,000 square feet of space built in 1959 and renovated in 2004 and 2019. Located across MD 410 (East West Highway) from the Green Line Metro station, the mall is anchored by Macy's, Target, and Marshalls. The mall is surrounded by apartments, government offices, and medical offices, creating a mixed-use environment. The cluster also includes University Town Center, a 1960s office development that has been redeveloped with a new 140,000-square-foot shopping center anchored by a 54,000-square-foot Safeway as well as student housing and renovated office buildings. The University Boulevard/New Hampshire Avenue/Riggs Road cluster of retail extends along MD 193 (University Boulevard) with two nodes at MD 212 (Riggs Road) and at MD 650 (New Hampshire Avenue). The cluster's 1,225,000 square feet of retail space is heavily oriented to Latinx and Asian customers, offering a wide variety of specialty goods as well as ethnic foods and restaurants. The Purple Line will provide a direct connection from the Sector Plan area to new stations at Riggs Road and at Takoma/Langley Crossroads (MD 193 at MD 650).

In addition to these competitive retail clusters, further outside the Adelphi Road-UMGC-UMD Purple Line Station Area Sector Plan retail market area larger shopping centers and commercial strips near I-495 (Capital Beltway) (including furniture giant IKEA) draw regional customers.

Retail Demand

In understanding retail markets, analysts break down retail goods into three main categories:

- **Neighborhood goods and services**, which serve the everyday needs of local residents, including grocery stores and drugstores
- **Eating and drinking**, including fast-food and sit-down restaurants and bars
- **Shoppers goods**, the types of goods sold in department stores that customers prefer to compare among different stores before buying—general merchandise, apparel and accessories, furniture and home furnishings, and other goods (also known as GAFO).

Neighborhood goods and services stores tend to attract customers from within a five- to 10-minute

distance, while shopping centers and other shoppers goods nodes may bring customers from a 15- to 20-minute distance or even further.

In evaluating future retail needs, it is also worth considering the decades of over-expansion of retail across the United States, emerging trends and pressure of e-commerce growth, and the lingering retail impacts of the COVID-19 pandemic. E-commerce has revolutionized large segments of the retail industry, expanding to an estimated 21.3 percent of total U.S. sales by the end of 2020. Several major chains (Pier One Imports, Toys-R-Us, Sports Authority, Borders Books, and HH Gregg) have closed over the past decade as a result, and many other chains are closing individual stores. E-commerce will become even more competitive with the introduction of autonomous/driverless vehicles, drones and robots that reduce the labor costs associated with distribution. As deliveries become more convenient, less costly, and faster, shoppers will be less likely to visit a brick-and-mortar store and retailing will continue to significantly change.

It is likely more retailers will shift to a hybrid model of business, leveraging brick-and-mortar and e-commerce to balance between the efficiency of online and the experience of in-person shopping. In 2017, the College Park Amazon Hub lockers, which offer Amazon shoppers instant pick up of their orders was one of the company's first brick-and-mortar locations nationwide. Other retailers hoping to create omni-channel retail options seek to expand to more experiential-based customer options. The retailers that persist will be those that offer an experience more than simply a transaction, such as restaurants, entertainment, and retailers that allow shoppers to try out goods before ordering them for delivery to their homes.

These recent retail shifts suggest the retail industry remains in transition, and caution should be used in planning and developing new retail space. Retail development opportunities are best focused at sites that reinforce and benefit from multimodal accessibility and well-designed and managed public open spaces.

Retail Expenditures

The comparison between the dollars spent by Adelphi Road Sector Plan PMA residents, as well as local employees, for retail goods and the sales reported by area retailers, as estimated by Esri, is the key measure of unmet demand that could be used to draw new retailers to the area. The difference between

Table 13. Primary Market Area Sales and Expenditures by Retail Category, 2017

	Demand (Retail Potential)	Current Sales	Retail Gap
Neighborhood Goods and Services			
Food & Beverage Stores	\$30,606,943	\$3,720,017	\$26,886,926
Grocery Stores	\$25,697,434	\$3,486,755	\$22,210,679
Specialty Food Stores	\$1,522,964	\$233,262	\$1,289,702
Beer, Wine & Liquor Stores	\$3,386,545	\$0	\$3,386,545
Health & Personal Care Stores	\$9,972,651	\$7,661,293	\$2,311,358
Subtotal	\$40,579,594	\$11,381,310	\$29,198,284
Food & Beverage			
Food Services & Drinking Places	\$18,505,791	\$28,105,230	-\$9,599,439
Special Food Services	\$558,085	\$0	\$558,085
Drinking Places - Alcoholic Beverages	\$548,693	\$0	\$548,693
Restaurants/Other Eating Places	\$17,399,014	\$28,105,230	-\$10,706,216
Subtotal	\$18,505,791	\$28,105,230	-\$9,599,439
Shoppers Goods (GAFO)			
General Merchandise Stores	\$27,227,932	\$965,482	\$26,262,450
Clothing & Clothing Accessories Stores	\$12,038,593	\$3,759,291	\$8,279,302
Furniture & Home Furnishings Stores	\$6,042,507	\$0	\$6,042,507
Electronics & Appliance Stores	\$6,759,904	\$2,606,060	\$4,153,844
Sporting Goods, Hobby, Book & Music Stores	\$5,146,824	\$2,632,814	\$2,514,010
Miscellaneous Store Retailers	\$6,115,571	\$30,412	\$6,085,159
Subtotal	\$63,331,331	\$9,994,059	\$53,337,272

SOURCE: Esri, Retail Marketplace Profile, accessed March 2021; Partners for Economic Solutions, 2021.

expenditures and sales represents “sales outflow” (market area residents’ dollars spent outside of the market area) or “sales inflow” where store sales exceed residents’ expenditures by attracting dollars from shoppers who live outside the market area.

A review of demand and estimates of the current sales volumes for stores throughout the Adelphi Road Sector Plan PMA indicates growth and gap potential in a few categories. Table 12 compares total potential expenditures from residents with actual sales by local retailers to identify opportunities for additional retail space by category.

For neighborhood goods and services, market area households spend \$40.6 million annually and area stores capture only \$11.4 million, meaning customers travel outside the area to access stores and meet some of their types of retail and personal service needs. It is not unusual to capture less than the full potential of demand with competitive offerings in nearby

communities, including the more affordable clusters in Takoma/Langley Park and Greenbelt.

As would be expected, the extensive restaurant options along the US 1 (Baltimore Avenue), The Mall at Prince George’s, and University Town Center corridor—particularly with popular national chains and legacy businesses catering to the diversity of student interests—present sufficient opportunities, especially when considering the competitive climate for eating and drinking spending. Again, area residents eat in restaurants and carry out food from outside the corridor when at work or on vacation and they travel to competitive restaurant clusters such as downtown Silver Spring, downtown D.C. or elsewhere in the region. The excess of \$28 million current sales estimates within the PMA as compared with the \$18 million demand for eating and drinking indicates many folks come to the corridor to eat and drink. These sales include spending by hotel guests and

other visitors attracted to sporting events or other university activities opting to eat in local restaurants.

Because most shoppers like to compare their options when shopping for clothes and furnishings, they tend to seek out major shopping malls and other retail clusters for their shoppers goods purchases. The demand and supply disparities are greatest for shoppers goods where overall demand from corridor residents totals \$63.3 million but sales total only \$9.9 million. This reflects the competitive retail environment and limited presence of big-box retailers such as Target within the immediate area. Area shoppers have access to any number of regional malls, outlet malls, big-box retailers, and lifestyle centers depending on their tastes and preferences. Plans to replace and modernize much of the retail offerings closest to campus along Baltimore Avenue indicate a pressure to provide more efficient and modern retail space to meet retailers' needs. Given the many better locations for shoppers goods retailers, it would not be realistic to expect to attract such stores to the Adelphi Road Sector Plan area.

The addition of the Purple Line and future commercial mixed-use projects impact the Sector Plan area's ability to support additional retail space. Capturing dollars spent by students living on campus (a population limited by income and transportation) as well as faculty, staff, and visitors will assist in the success of any new retail stock within the Sector Plan area. Additional advantages for new retailers are their visibility and accessibility to a main roadway and their ability to offer a selection of goods, services, and unique entertainment options appealing to residents, students, and others affiliated with the university. The Sector Plan area is not well positioned to compete for retail space given the proximity of the four major competitive clusters. The surrounding residential density is relatively low with some limitations on future density imposed by land constraints, and the area draws limited foot traffic from the campus. The existing competition offered by nearby retail clusters, on-campus retail, and the major retail centers and big-box retailers is simply too great to be countered by a small retail offering in the Sector Plan area.

MD 193 (University Boulevard) carries 30,000 average daily trips, but visibility from the road is blocked by the topography and such uses would be inconsistent with the pedestrian-oriented environment envisioned to support the Purple Line's Adelphi Road-UMGC-UMD Station. New pedestrian-oriented retail space will need to aggregate demand from residents of the area's new housing with demand from existing area

Table 14. Adelphi Road Sector Plan Area Retail Potential

Retail Category	Square feet	
	Near term 2021-2031	Long term 2031-2045
Neighborhood Goods & Services	5,400	8,050
Food & Beverage	8,300	10,950
Shoppers Goods	-	-
Subtotal	13,700	19,000

SOURCE: Partners for Economic Solutions, 2021.

residents and nearby UMGC workers with demand from Purple Line riders frequenting the new station. Given the scale of the area, the only supportable types of retail would be a grocery store, a drugstore, and a café or restaurant.

A grocery store would be subject to significant competition from the new Lidl and Whole Foods as well as the existing Shoppers Food Warehouse off US 1 (Baltimore Avenue) at I-95 (Capital Beltway), the Safeway at University Town Center, Giant Food at Beltway Plaza and grocery stores in the Takoma/Langley Park retail cluster. Additional competition is provided by Costco, Target, and other major retailers providing delivery services. Additional grocery stores may be added to the community within larger mixed-use projects such as Bozzuto's Southern Gateway project.

Combining the expenditures of existing and future residents with those associated with UMGC workers and others boarding or exiting the Purple Line at the Adelphi Road-UMGC-UMD Station, suggests an ultimate potential for \$9.2 million in spending in grocery stores, \$11.1 million in drugstores, and \$4.2 million in restaurants and cafes. However, these sales levels are insufficient to support a new grocery store or drugstore.

The Sector Plan area could support one or two convenience retailers and service providers and up to 8,300 square feet of café and restaurant spaces in the near term to 2031. Over the longer term to 2045 completion of the anticipated residential development will allow expansion of the neighborhood goods and services to 8,000 square feet and food and beverage spaces to 11,000 square feet. These retailers are likely to be primarily accommodated in the first floor of new apartment buildings.

Strengths, Weaknesses, Opportunities, and Threats Analysis

Preliminary evaluations based on the market data, real estate trend insights, and direct interviews with stakeholders identified the following strengths, weaknesses, threats, and opportunities from an economic perspective as an additional input in the Adelphi Road-UMGC-UMD Purple Line Station Area Sector Plan process.

Strengths

- Presence of University of Maryland and University of Maryland Global Campus
- Location and access via vehicular and rail transportation corridors including I-495 (Capital Beltway), state routes, heavy and light rail
- High traffic volume creates visibility and a potential drive-by customer base
- Strong and growing market base of middle-income residents of surrounding neighborhoods and higher-density apartment complexes
- Established clusters of commercial corridors surrounding the study area and easily accessible via the Purple Line
- Addition of new residential development and modernization of existing retail space in the market
- Churches and institutions

Weaknesses

- Lack of a sense of place
- Congestion and driver confusion/collisions
- Environmental constraints on future development related to stormwater management and preservation of tree canopy
- Harsh, sterile public realm because of the size of the intersection and missing sidewalk infrastructure
- Pedestrian and bicycle access is difficult and dangerous

- Parcel assemblage limited by ownership pattern
- Institutionally held sites near the station are underutilized
- Poor visibility for uses because of topography and current uses that block the view
- Run-down appearance of some businesses along Adelphi Road
- Aging buildings that do not meet modern retailing standards

Opportunities

- Assemblages and building demolitions for reconfiguration to Campus Drive/University Boulevard intersection
- Purple Line station area development a key asset to attract more residents
- Aging population and proximity to university could support new senior housing
- Ride-sharing and alternatives to private vehicles could reduce parking demand in the long term

Threats

- Impact of potential enrollment decline at UMD on the market
- Growing traffic volumes create congestion and delays
- Construction period disruptions
- Loss of affordable residential space
- Redevelopment at higher densities could generate more congestion
- Competition from e-commerce reduces demand for brick-and-mortar retail space reducing opportunities for activation of street-level spaces
- High cost of ownership housing limiting opportunities for new homeowners

Appendix A

Table A–1. Households by Size, 2020

	Primary Market Area ¹		City of College Park		Prince George's County	
	Number	Percent	Number	Percent	Number	Percent
1 Person	650	18.0%	2,047	29.0%	88,010	28.5%
2 People	1,197	28.5%	2,044	29.0%	88,397	28.6%
3 People	516	15.5%	1,086	15.4%	52,829	17.1%
4 People	586	18.8%	868	12.3%	40,588	13.1%
5 People	338	9.6%	534	7.6%	21,673	7.0%
6 People	188	4.0%	335	4.7%	9,948	3.2%
7+ People	132	2.2%	140	2.0%	7,404	2.4%
Total Households	3,607	100.0%	7,054	100.0%	308,849	100.0%
Average Household Size	3.23		2.83		2.79	

¹ Adelphi Road-UMGC/UMD Purple Line Station Area Sector Plan Primary Market Area includes the following Metropolitan Washington Council of Governments Transportation Analysis Zones 916, 917, 918, 920, 975, 976, 977, 979 and 980.

SOURCE: American Community Survey 2015-2019; Esri, ACS Population Summary, accessed January, 2021; Partners for Economic Solutions, 2021.

Table A–2. Population by Age, 2020

	Primary Market Area ¹		City of College Park		Prince George's County	
	Number	Percent	Number	Percent	Number	Percent
0 to 19 Years	9,391	38.8%	10,489	32.9%	229,201	25.3%
20 to 24 Years	6,796	28.1%	10,075	31.6%	64,883	7.2%
25 to 34 Years	2,360	9.7%	3,505	11.0%	136,064	15.0%
35 to 44 Years	1,548	6.4%	2,076	6.5%	122,334	13.5%
45 to 54 Years	1,237	5.1%	1,673	5.3%	115,758	12.8%
55 to 64 Years	1,433	5.9%	1,894	5.9%	112,336	12.4%
65 to 74 Years	885	3.7%	1,273	4.0%	77,717	8.6%
75 to 84 Years	406	1.7%	625	2.0%	35,092	3.9%
85 Years and over	156	0.6%	254	0.8%	11,544	1.3%
Total	24,212	100.0%	31,864	100.0%	904,929	100.0%
Median Age	22.0		22.7		36.7	

¹ Adelphi Road-UMGC/UMD Purple Line Station Area Sector Plan Primary Market Area includes the following Metropolitan Washington Council of Governments Transportation Analysis Zones 916, 917, 918, 920, 975, 976, 977, 979 and 980.

SOURCE: US Census Bureau, Census 2010 Summary File 1; Esri, Demographic and Income Profile, accessed January 2021; Partners for Economic Solutions, 2021.

Table A–3. Population by Age Current and Future, 2010–2025

	Primary Market Area¹					
	2010		2020		2025	
	Number	Percent	Number	Percent	Number	Percent
0 to 19 Years	9,111	40.0%	9,391	38.8%	9,586	37.5%
20 to 24 Years	6,578	28.8%	6,796	28.1%	7,699	30.1%
25 to 34 Years	2,228	9.8%	2,360	9.7%	2,239	8.7%
35 to 44 Years	1,363	6.0%	1,548	6.4%	1,654	6.5%
45 to 54 Years	1,290	5.7%	1,237	5.1%	1,296	5.1%
55 to 64 Years	1,242	5.4%	1,433	5.9%	1,424	5.6%
65 to 74 Years	561	2.5%	885	3.7%	980	3.8%
75 to 84 Years	313	1.4%	406	1.7%	533	2.1%
85 Years and Over	120	0.5%	156	0.6%	178	0.7%
Total Population	22,806	100.0%	24,212	100.0%	25,589	100.0%
<i>Median Age</i>	<i>21.7</i>		<i>22.0</i>		<i>22.1</i>	
	Prince George's County					
	2010		2020		2025	
	Number	Percent	Number	Percent	Number	Percent
0 to 19 Years	236,408	27.4%	229,201	25.3%	229,944	24.7%
20 to 24 Years	70,644	8.2%	64,883	7.2%	64,289	6.9%
25 to 34 Years	125,740	14.6%	136,064	15.0%	133,114	14.3%
35 to 44 Years	123,932	14.4%	122,334	13.5%	134,776	14.5%
45 to 54 Years	128,053	14.8%	115,758	12.8%	112,494	12.1%
55 to 64 Years	97,130	11.2%	112,336	12.4%	110,441	11.9%
65 to 74 Years	50,100	5.8%	77,717	8.6%	85,628	9.2%
75 to 84 Years	23,125	2.7%	35,092	3.9%	45,696	4.9%
85 Years and Over	8,288	1.0%	11,544	1.3%	13,572	1.5%
Total Population	863,420	100.0%	904,929	100.0%	929,954	100.0%
<i>Median Age</i>	<i>34.9</i>		<i>36.7</i>		<i>37.7</i>	

¹ Adelphi Road-UMGC/UMD Purple Line Station Area Sector Plan Primary Market Area includes the following Metropolitan Washington Council of Governments Transportation Analysis Zones 916, 917, 918, 920, 975, 976, 977, 979 and 980.

SOURCE: US Census Bureau, Census 2010 Summary File 1; Esri, Demographic and Income Profile, accessed January, 2021; Partners for Economic Solutions, 2021.

Table A–4. Households by Tenure, 2000-2020

	Primary Market Area ¹		City of College Park		Prince George's County	
	Number	Percent	Number	Percent	Number	Percent
Tenure, 2000						
Owner	2,531	67.2%	3,698	59.3%	191,002	66.6%
Renter	1,236	32.8%	2,538	40.7%	95,597	33.4%
Tenure, 2010						
Owner	2,332	57.1%	3,034	45.4%	191,002	62.8%
Renter	1,751	42.9%	3,648	54.6%	113,040	37.2%
Tenure, 2020						
Owner	2,299	52.8%	3,332	47.2%	198,516	62.7%
Renter	2,058	47.2%	3,720	52.8%	118,240	37.3%

¹ Adelphi Road-UMGC/UMD Purple Line Station Area Sector Plan Primary Market Area includes the following Metropolitan Washington Council of Governments Transportation Analysis Zones 916, 917, 918, 920, 975, 976, 977, 979 and 980.

SOURCE: US Census Bureau, 2010 Summary File; 2017, 2018 Consumer Expenditure Survey, Bureau of Labor Statistics; Esri, Community Profile, accessed February, 2021; Partners for Economic Solutions, 2021.

Table A–5. Households by Income, 2020

	Primary Market Area ¹		City of College Park		Prince George's County	
	Number	Percent	Number	Percent	Number	Percent
Less than \$25,000	1,058	24.3%	2,213	31.4%	34,775	11.0%
\$25,000 to \$34,999	223	5.1%	299	4.2%	16,884	5.3%
\$35,000 to \$49,999	300	6.9%	485	6.9%	30,460	9.6%
\$50,000 to \$74,999	462	10.6%	970	13.8%	56,854	17.9%
\$75,000 to \$99,999	446	10.2%	742	10.5%	47,673	15.1%
\$100,000 to \$149,999	737	16.9%	1,082	15.3%	62,022	19.6%
\$150,000 or more	1,132	26.0%	1,259	17.9%	68,087	21.5%
Total	4,358	100.0%	7,050	100.0%	316,755	100.0%
<i>Median Household Income</i>	<i>\$81,359</i>		<i>\$61,492</i>		<i>\$83,429</i>	

¹ Adelphi Road-UMGC/UMD Purple Line Station Area Sector Plan Primary Market Area includes the following Metropolitan Washington Council of Governments Transportation Analysis Zones 916, 917, 918, 920, 975, 976, 977, 979 and 980.

SOURCE: US Census Bureau, Census 2010 Summary File 1; Esri, Household Income Profile, accessed February, 2021; Partners for Economic Solutions, 2021.

Table A–6. Means of Transportation to Work, 2019

	Primary Market Area ¹		City of College Park		Prince George's County	
	Employed Residents	Percent	Employed Residents	Percent	Employed Residents	Percent
Car, Truck, or Van	8,326	56.3%	8,672	58.7%	368,386	77.8%
Drove alone	6,883	45.6%	7,875	53.3%	317,416	67.0%
Carpooled	1,443	10.6%	797	5.4%	50,970	10.8%
Public Transportation (excluding taxicab)	2,495	13.7%	2,288	15.5%	72,946	15.4%
Walked	2,552	22.3%	2,642	17.9%	9,450	2.0%
Taxicab, Motorcycle, Bicycle, Other	374	3.1%	676	4.6%	8,199	1.7%
Worked from Home	536	4.6%	494	3.3%	14,525	3.1%
Total	14,283	100.0%	14,772	100.0%	473,506	100.0%

¹ Adelphi Road-UMGC/UMD Purple Line Station Area Sector Plan Primary Market Area includes the following Metropolitan Washington Council of Governments Transportation Analysis Zones 916, 917, 918, 920, 975, 976, 977, 979 and 980.

SOURCE: U.S. Census Bureau, 2015-2019 American Community Survey (ACS); Esri, ACS Housing Summary, accessed January, 2021; Partners for Economic Solutions, 2021.

Table A–7. Tenure by Age of Householder, 2010

	Primary Market Area ¹				City of College Park			
	Owner		Renter		Owner		Renter	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
15 to 24 years	26	1.1%	922	52.6%	58	1.9%	1,818	49.9%
25 to 34 years	165	7.1%	504	28.8%	304	10.0%	814	22.3%
35 to 44 years	402	17.3%	146	8.3%	511	16.8%	288	7.9%
45 to 54 years	521	22.4%	91	5.2%	716	23.6%	281	7.7%
55 to 64 years	629	27.0%	58	3.3%	681	22.4%	188	5.2%
65 to 74 years	324	13.9%	18	1.0%	373	12.3%	149	4.1%
75 to 84 years	190	8.2%	12	0.7%	272	9.0%	78	2.1%
85 years and over	73	3.1%	2	0.1%	122	4.0%	29	0.8%
Total	2,330	100%	1,753	100%	3,037	100%	3,645	100%

	Prince George's County			
	Owner		Renter	
	Number	Percent	Number	Percent
15 to 24 years	1,321	0.7%	10,582	9.4%
25 to 34 years	17,154	9.0%	30,776	27.2%
35 to 44 years	37,696	19.7%	26,325	23.3%
45 to 54 years	50,419	26.4%	21,532	19.0%
55 to 64 years	44,896	23.5%	12,981	11.5%
65 to 74 years	24,933	13.1%	6,246	5.5%
75 to 84 years	11,431	6.0%	3,207	2.8%
85 years and over	3,143	1.6%	1,400	1.2%
Total	190,993	100%	113,049	100%

¹ Adelphi Road-UMGC/UMD Purple Line Station Area Sector Plan Primary Market Area includes the following Metropolitan Washington Council of Governments Transportation Analysis Zones 916, 917, 918, 920, 975, 976, 977, 979 and 980.

SOURCE: U.S. Census Bureau, 2015–2019 American Community Survey (ACS); Esri, ACS Housing Summary, accessed January, 2021; Partners for Economic Solutions, 2021.

Table 8. Existing Business Inventory, 2021

Business Name	Address	City	State	Zip Code
University United Methodist Church	3621 Campus Drive	College Park	MD	20740
Korean Dispora Leadership Center	Campus Drive	College Park	MD	20740
University Baptist Church	3515 Campus Drive	College Park	MD	20740
Nadulmok Community Church	Campus Drive	College Park	MD	20740
St. Mark The Evangelist	7501 Adelphi Road	Hyattsville	MD	20783
Prince George's County	Adelphi Road	Hyattsville	MD	20783
St. Francis International School	7501 Adelphi Road	Hyattsville	MD	20783
St. Mark's School	7501 Adelphi Road	Hyattsville	MD	20783
ARCA Inc.	Adelphi Road	Hyattsville	MD	20783
Subway	3711 Campus Drive	College Park	MD	20740
Indileo Corporation	3711 Campus Drive	College Park	MD	20740
Gateway Newstand	3711 Campus Drive	College Park	MD	20740
520 Ice Cream & Tea	3711 Campus Drive	College Park	MD	20740
Casey's Coffee	3711 Campus Drive	College Park	MD	20740
O'My Buns	Campus Drive	College Park	MD	20740
Kedma	7612 Mowatt Lane	College Park	MD	20740
University-MD Eastern Physicians	7612 Mowatt Lane	College Park	MD	20740
Master Service Learning Club	7612 Mowatt Lane	College Park	MD	20740
Church of Jesus Christ of Latter-day Saints	7601 Mowatt Lane	College Park	MD	20740

SOURCE: Esri, Business Locator, accessed February 2021; PES, 2021.

Table A–9. Employed Population Aged 16 and Over by Occupation, 2020

	Primary Market Area ¹		City of College Park		Prince George's County	
	Number	Percent	Number	Percent	Number	Percent
White Collar	6,666	67.0%	9,172	69.7%	289,426	61.2%
Management, Business, Financial	995	10.0%	1,395	10.6%	72,829	15.4%
Professional Services	3,781	38.0%	5,066	38.5%	112,082	23.7%
Sales	617	6.2%	1,026	7.8%	34,050	7.2%
Administrative Support	1,264	12.7%	1,671	12.7%	70,465	14.9%
Services	1,920	19.3%	2,408	18.3%	93,638	19.8%
Blue Collar	1,353	13.6%	1,579	12.0%	89,854	19.0%
Farming, Forestry, Fishing	10	0.1%	-	0.0%	473	0.1%
Construction, Extraction	826	8.3%	711	5.4%	35,469	7.5%
Installation, Maintenance, Repair	139	1.4%	184	1.4%	13,242	2.8%
Production	149	1.5%	382	2.9%	10,877	2.3%
Transportation, Material Moving	229	2.3%	303	2.3%	29,321	6.2%
Total	9,949	100.0%	13,159	100.0%	472,918	100.0%

¹ Adelphi Road-UMGC/UMD Purple Line Station Area Sector Plan Primary Market Area includes the following Metropolitan Washington Council of Governments Transportation Analysis Zones 916, 917, 918, 920, 975, 976, 977, 979 and 980.

SOURCE: US Census Bureau, Census 2010 Summary File 1; Esri, Housing Profile, accessed February 2021; Partners for Economic Solutions, 2021.

Table A–10. Housing Units by Number of Units in Structure, 2019

	Primary Market Area ¹		City of College Park		Prince George's County	
	Number	Percent	Number	Percent	Number	Percent
1, Detached	2,416	60.8%	4,569	59.0%	172,529	51.8%
1, Attached	452	11.4%	284	3.7%	52,104	15.6%
Duplex	9	0.2%	42	0.5%	1,727	0.5%
3 to 4	31	0.8%	134	1.7%	5,187	1.6%
5 to 9	80	2.0%	273	3.5%	24,188	7.3%
10 to 19	297	7.5%	305	3.9%	44,339	13.3%
20 to 49	189	4.8%	305	3.9%	6,890	2.1%
50 or more	497	12.5%	1,833	23.7%	24,557	7.4%
Mobile Home	5	0.1%	-	0.0%	1,404	0.4%
Other	-	0.0%	-	0.0%	116	0.0%
Total	3,976	100.0%	7,745	100.0%	333,041	100.0%
Transportation, Material Moving	229	2.3%	303	2.3%	29,321	6.2%
Total	9,949	100.0%	13,159	100.0%	472,918	100.0%

¹ Adelphi Road-UMGC/UMD Purple Line Station Area Sector Plan Primary Market Area includes the following Metropolitan Washington Council of Governments Transportation Analysis Zones 916, 917, 918, 920, 975, 976, 977, 979 and 980.

SOURCE: US Census American Community Survey (ACS), 2015-2019; Esri, ACS Housing Summary, accessed February, 2021; Partners for Economic Solutions, 2021.

Table A–11. Housing Units by Year Built, 2019

	Primary Market Area ¹		City of College Park		Prince George's County	
	Number	Percent	Number	Percent	Number	Percent
2014 or later	62	1.6%	53	0.7%	269	0.3%
2010 to 2013	177	4.6%	578	7.5%	1,057	1.0%
2000 to 2009	191	5.0%	841	10.9%	25,438	25.1%
1990 to 1999	224	5.8%	676	8.7%	17,588	17.3%
1980 to 1989	215	5.6%	459	5.9%	29,281	28.8%
1970 to 1979	279	7.3%	664	8.6%	16,279	16.0%
1960 to 1969	414	10.8%	1,262	16.3%	7,267	7.2%
1950 to 1959	1,328	34.7%	1,568	20.2%	3,474	3.4%
1940 to 1949	505	13.2%	739	9.5%	306	0.3%
1939 or Earlier	436	11.4%	905	11.7%	573	0.6%
Total	3,831	100.0%	7,745	100.0%	101,532	100.0%
<i>Median Year Built</i>	<i>1957</i>		<i>1965</i>		<i>1988</i>	

¹ Adelphi Road-UMGC/UMD Purple Line Station Area Sector Plan Primary Market Area includes the following Metropolitan Washington Council of Governments Transportation Analysis Zones 916, 917, 918, 920, 975, 976, 977, 979 and 980.

SOURCE: US Census American Community Survey (ACS), 2015-2019; Esri, ACS Housing Summary, accessed February, 2021; Partners for Economic Solutions, 2021.

Table A–12. Housing by Tenure and Vacancy Status, 2010

	Primary Market Area ¹		City of College Park		Prince George's County	
	Number	Percent	Number	Percent	Number	Percent
Owner-Occupied Units	2,330	44.5%	3,328	39.4%	198,386	57.8%
Renter-Occupied Units	1,753	49.7%	3,724	44.0%	118,370	34.5%
Vacant Units	204	5.8%	1,405	16.6%	26,698	7.8%
Total	4,287	100.0%	8,457	100.0%	343,454	100.0%

¹ Adelphi Road-UMGC/UMD Purple Line Station Area Sector Plan Primary Market Area includes the following Metropolitan Washington Council of Governments Transportation Analysis Zones 916, 917, 918, 920, 975, 976, 977, 979 and 980.

SOURCE: US Census Bureau, Census 2010 Summary File 1; Esri, Housing Profile, accessed February, 2021; Partners for Economic Solutions, 2021.

Table A–13. Vacant Housing by Status, 2010

	Primary Market Area ¹		City of College Park		Prince George's County	
	Number	Percent	Number	Percent	Number	Percent
For rent	87	41.8%	714	49.2%	9,246	38.3%
Rented, not occupied	8	3.8%	14	1.0%	405	1.7%
For sale only	43	20.7%	86	5.9%	5,095	21.1%
Sold, not occupied	8	3.8%	4	0.3%	656	2.7%
Seasonal, recreation use	8	3.8%	32	2.2%	676	2.8%
For seasonal workers	-	0.0%	-	0.0%	5	0.0%
Other vacant	54	26.0%	601	41.4%	8,057	33.4%
Total Vacant Units	208	100.0%	1,451	100.0%	24,140	100.0%

¹ Adelphi Road-UMGC/UMD Purple Line Station Area Sector Plan Primary Market Area includes the following Metropolitan Washington Council of Governments Transportation Analysis Zones 916, 917, 918, 920, 975, 976, 977, 979 and 980.

SOURCE: US Census Bureau, Census 2010 Summary File 1; Esri, Housing Profile, accessed February, 2021; Partners for Economic Solutions, 2021.

Appendix B

Map Citations for Maps 2, 3 and 4

Prince George's County Planning Department, Building 2017, Poly, February 18, 2021, https://gisdata.pgplanning.org/opendata/downloadzip.asp?FileName=../data/DXF/Building_2017_Py.zip

Prince George's County Planning Department, Street Centerline, Line, February 18, 2021, https://gisdata.pgplanning.org/opendata/downloadzip.asp?FileName=../data/ShapeFile/Street_Centerline_Ln.zip

Prince George's County Planning Department, Park, Poly, February 18, 2021, https://gisdata.pgplanning.org/opendata/downloadzip.asp?FileName=../data/ShapeFile/Park_Py.zip

Prince George's County Planning Department, Hydro Area, Poly, February 18, 2021, https://gisdata.pgplanning.org/opendata/downloadzip.asp?FileName=../data/ShapeFile/Hydro_Area_2017_Py.zip

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Maryland Department of Transportation, Maryland Transit Administration, Alignment Map, PDF, July 14, 2021, <https://www.purplelinemd.com/component/jdownloads/send/16-maps/53-purple-line-alignment-map>

