



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

# Henson Creek Village Market Study

Prepared by HR&A Advisors for the Prince  
George's County Planning Department

**HR&A**  
Analyze. Advise. Act.

**TOOLE**  
DESIGN



# Who We Are

**HR&A** is an economic development and real estate consulting firm working at the intersection of the public and private sectors. Our work transforms communities and revitalizes urban environments in the United States and abroad.

**Toole Design** is an engineering and design firm that specializes in helping communities plan, build, and improve their transportation systems.

# INTRODUCTION | Study Area Goals

- Create a visionary and feasible plan for a “**Downtown Fort Washington**” with a walkable, vibrant mix of retail, housing, and community space
- Utilize **Henson Creek as a recreational and environmental amenity**; integrate recreation into flood plain management and preserve natural spaces near the Creek
- Attract diverse, local retailers that bring a variety of **high-quality, appealing dining and shopping options** to area residents
- Support new and established **small businesses** through markets, pop-up spaces, and more
- Support **community health and wellness** with walkability and healthy retail and food options



# PRECEDENT PROJECTS | Where Does The Village Hope to Emulate?

The challenges and successes of recent regional development can help Henson Creek Village balance aspirations with market realities and consumer preferences.



**Bladensburg, MD:** Amenitized Anacostia River and nearby creek with waterfront parks integrated into the Anacostia River Trail.



**Oxon Hill, MD:** Potomac Overlook townhomes adjacent to National Harbor command premiums due to design, elevation, and proximity to waterfront.



**Arlington, VA:** Columbia Pike is transitioning from a strip-center suburban highway to a mixed-use walkable corridor.



**Columbia, MD:** Currently undergoing a 20-year, downtown revitalization to convert older suburban village to a mixed-use downtown.

# PRECEDENT PROJECTS | Amenitizing Stormwater Management Solutions

Creative stormwater management solutions increasingly double as recreational amenities.



**Buffalo Bayou Park:** Nationally recognized 160-acre park space in Houston accommodates stormwater runoff through widened bayou, special fixtures, and newly planted trees.



**Trinity River Corridor Project:** Ongoing Dallas project will revitalize green space 5x the size of Central Park for recreation and flood mitigation.



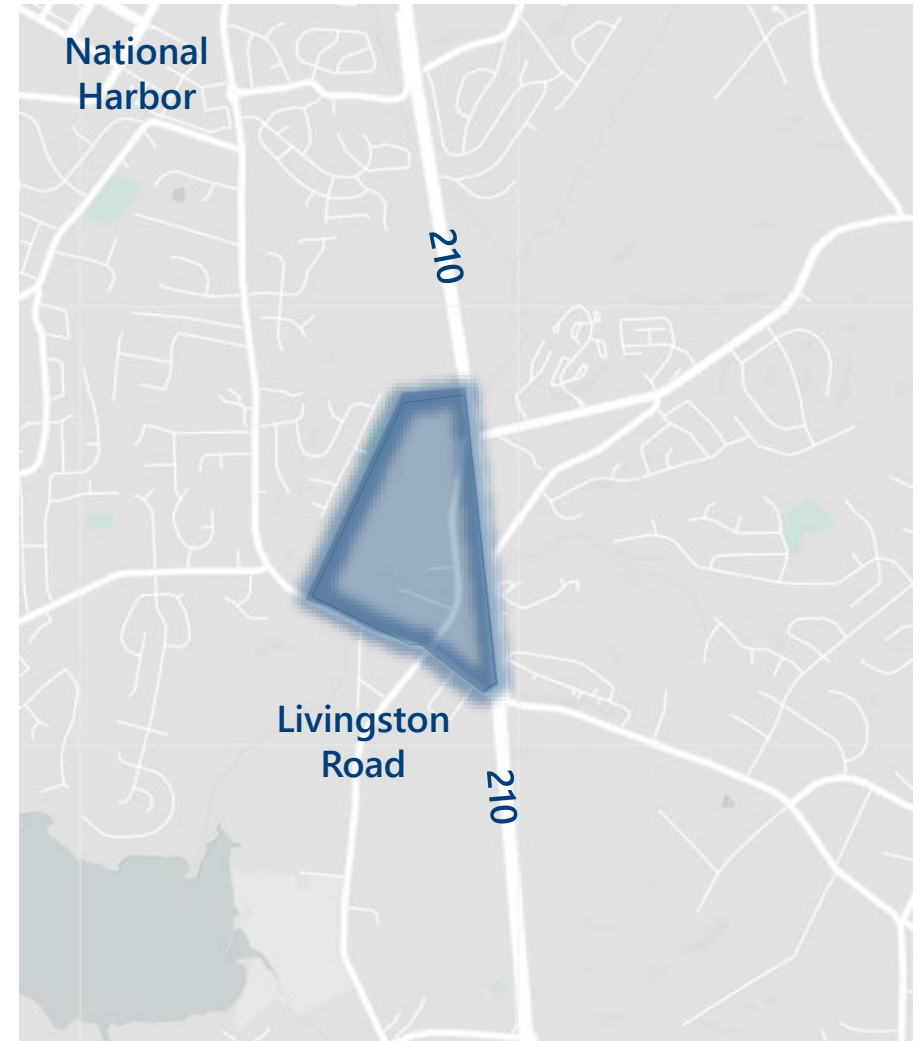
**Clear Creek Basin:** Atlanta park designed as stormwater reservoir with public recreation space and berm-seating amphitheater.

# INTRODUCTION | Real Estate Market Drivers and Constraints

Market realities associated with dense, downtown development:

- **Zoning:** Density, height, and use restrictions can limit the extent of large-scale development on a site.
- **Environment:** There are strict regulations for development in floodplains, along streams, and in wetland areas, which can hinder the feasibility of large projects.
- **Development Feasibility:** Maximizing benefits while balancing costs is a priority for developers and planning departments. In low-density residential areas with no public transit, developers may be less able to build higher density projects with amenities.
- **Supply/Demand:** New uses can only be built if there is sufficient unmet demand to justify their construction.

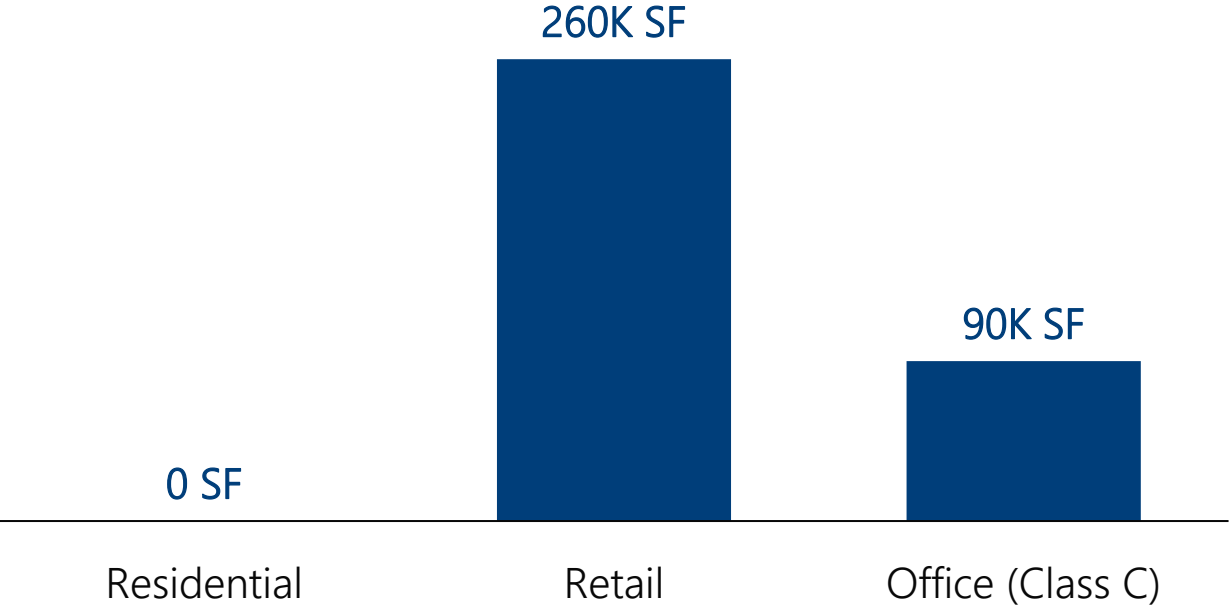
In the short term, these factors will determine the potential of the area to attract certain retailers and development typologies.



# INTRODUCTION | Current Uses

The Henson Creek Village area, bisected by Livingston Road and parallel to 210, has **no residential population** and is defined by **auto-oriented retail** and a modest amount of Class C office space.

**Henson Village Current Uses**



Source: Costar, HR&A

# INTRODUCTION | Transportation



**Challenge:** The sidewalk and trail network in Henson Creek Village is disconnected



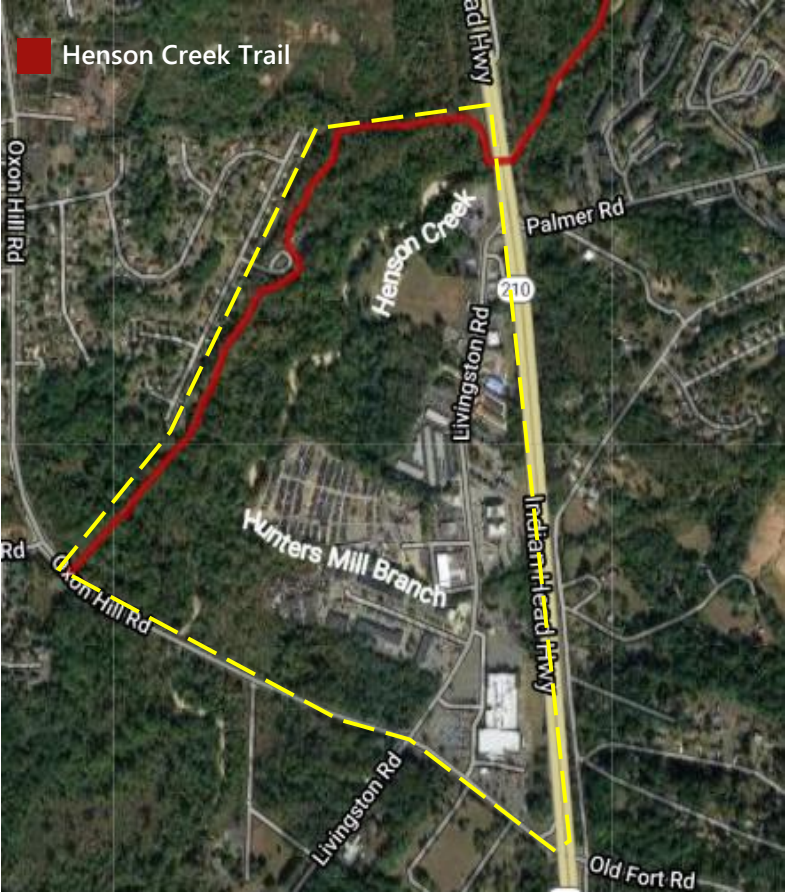
**Opportunity:** Traffic volumes on Livingston Road are very low for a four-lane street, and road space could be repurposed to improve pedestrian and bicycle access



# INTRODUCTION | Environmental Challenges and Opportunities



**Challenge:** Henson Creek Village lies in floodplain and is prone to frequent flooding



**Opportunity:** Amenitize the Henson Creek area through trail improvements and stormwater improvements that double as park space

# INTRODUCTION | Community Assets



1: Tanger Outlets



2: National Harbor Waterfront



3: Fort Foote Park



4: St John's Episcopal Church



5: Harmony Hall



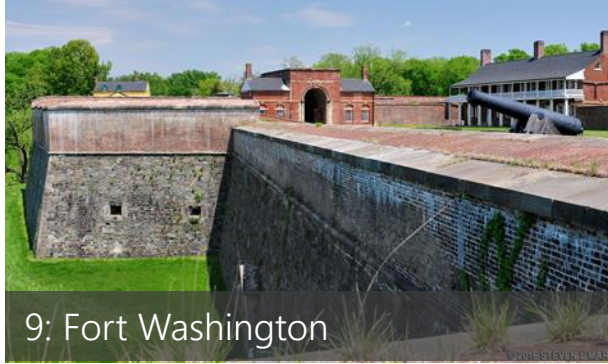
6: Adventist HealthCare



7: Tantallon Marina



8: National Golf Club



9: Fort Washington

# MARKET OVERVIEW | Fort Washington Demographics

	Population Growth 2010-2018	Median Household Income	Median Age
<b>Fort Washington</b>	<b>-4%</b>	<b>\$110K</b>	<b>47 Years</b>
<b>County Average</b>	<b>6%</b>	<b>\$80K</b>	<b>37 Years</b>

Negative population growth in adjacent neighborhoods since 2010 contrasts with positive growth of 6%-17% in the region's suburban counties.

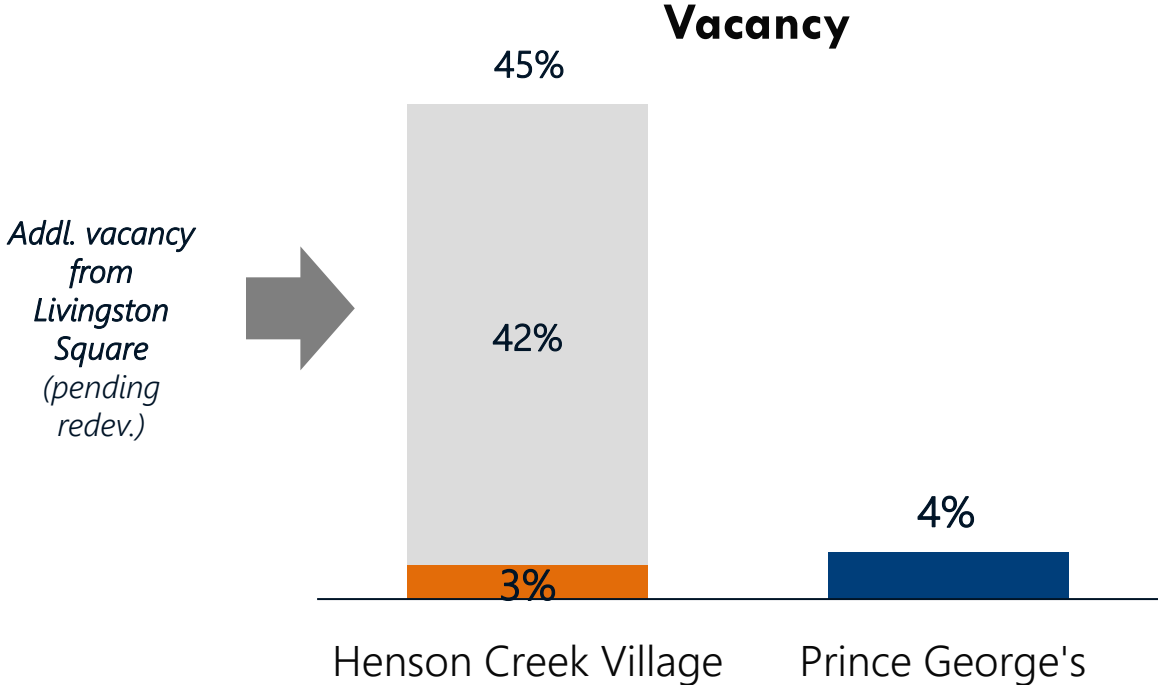
Median income in adjacent neighborhoods is higher than the county average, although below that of surrounding counties.

Median age is notably higher in adjacent neighborhoods than elsewhere in the region, and 20% higher than the County average.

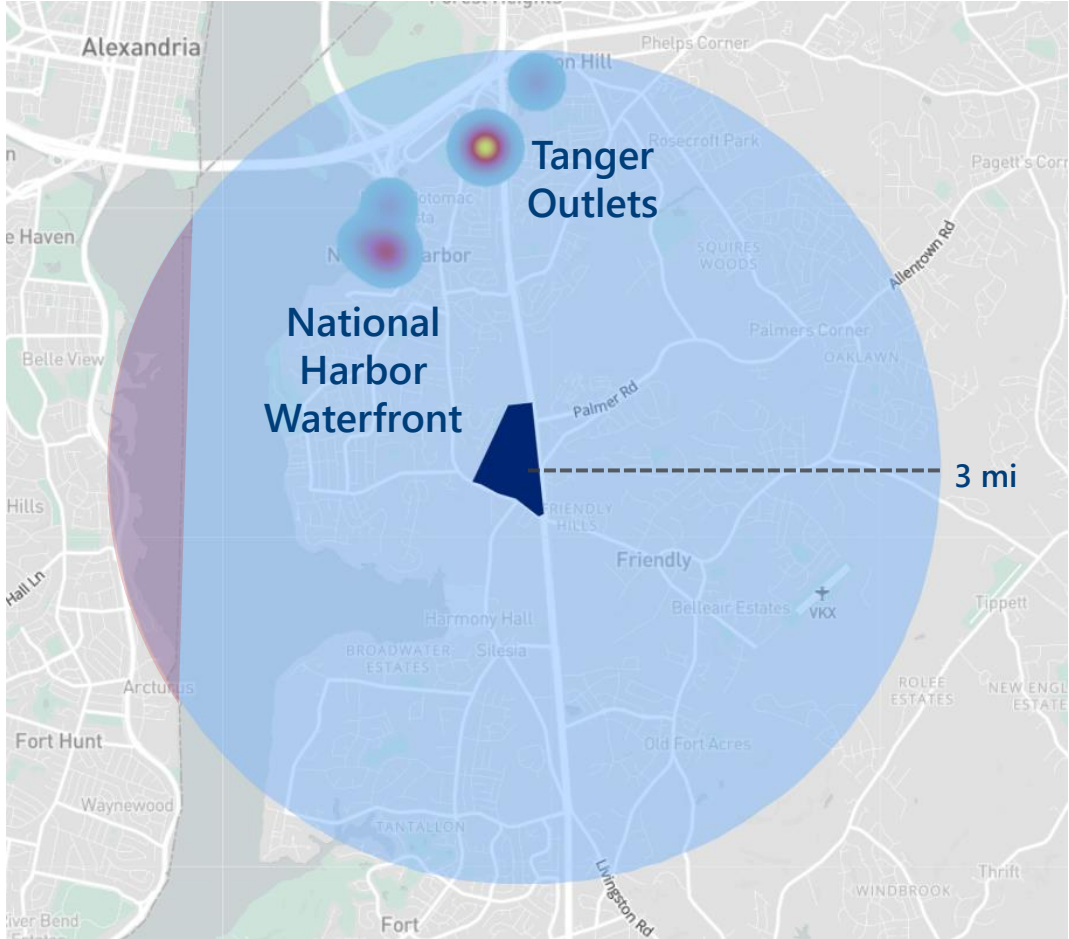
Source: ACS 5-Year Survey

# MARKET OVERVIEW | Retail

Livingston Square accounts for 107K SF (42%) of total retail in Henson Creek Village. The entire plaza has been vacated for anticipated redevelopment for the past several years.

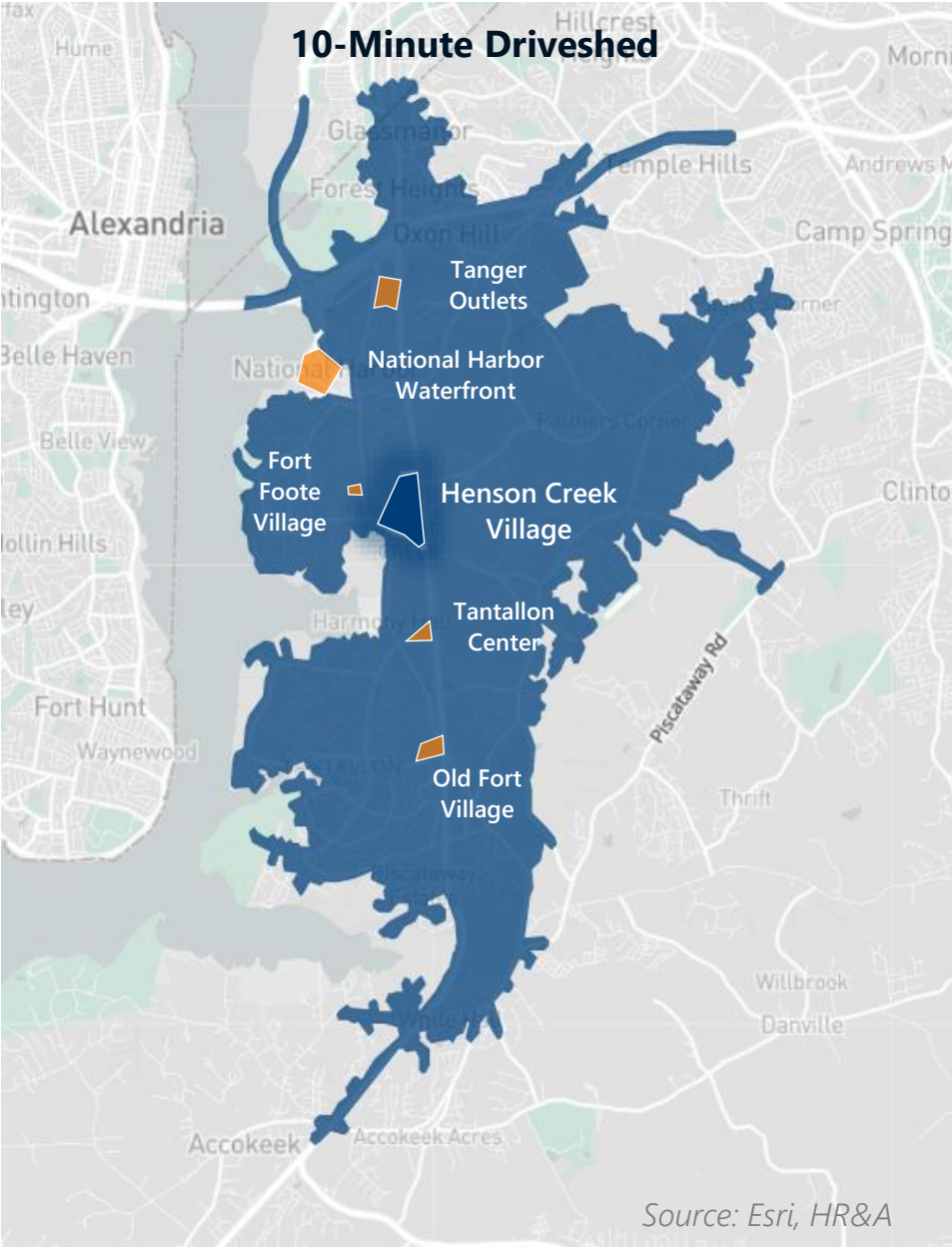


## New Development 2010-2018



# RETAIL GAP | Local Retail Demand

Despite rapid retail growth at National Harbor, neighborhoods within a 10-minute driveshed are still **underserved by current retail offerings.**

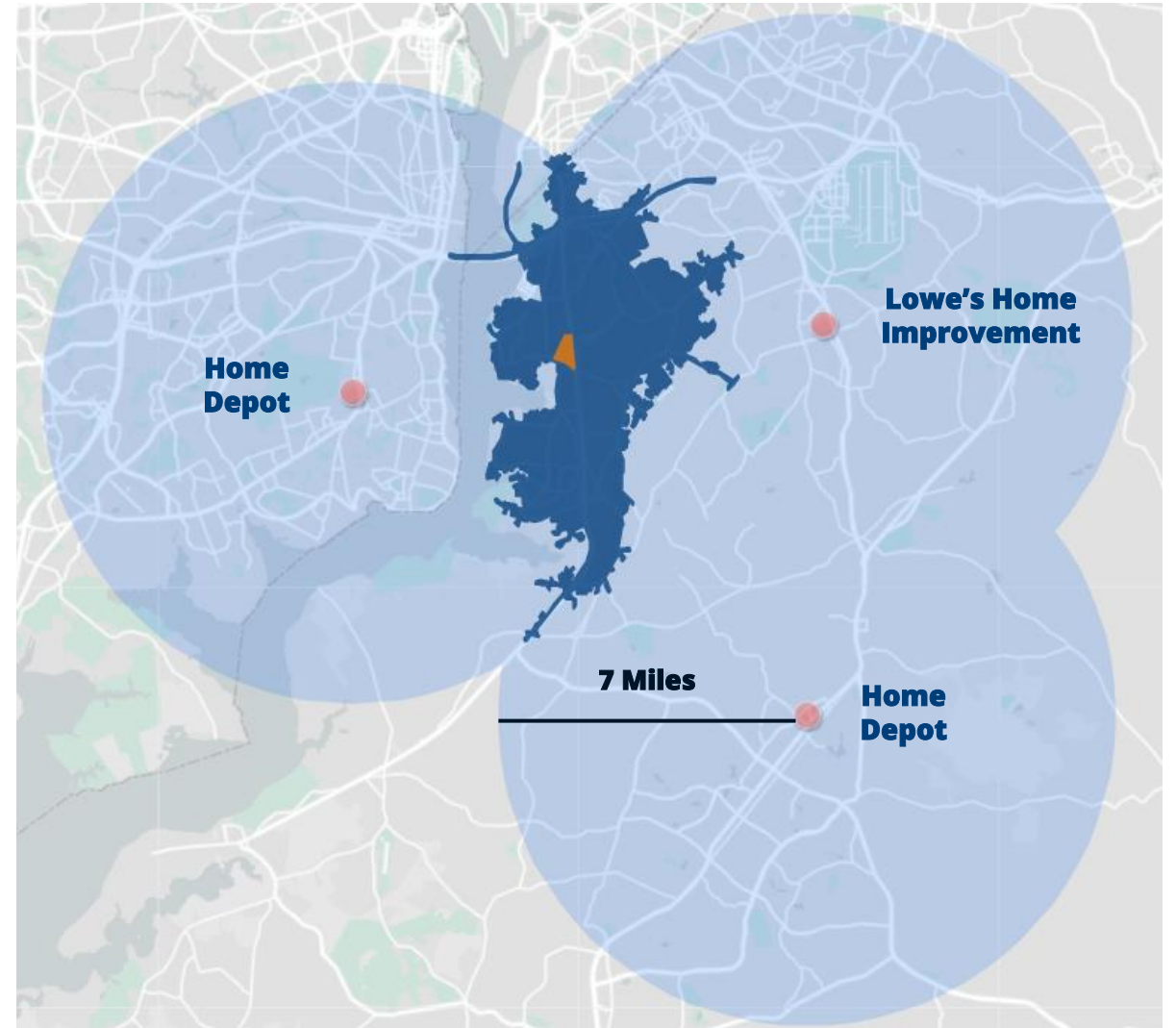


# RETAIL GAP | Trade Area Considerations

Retailers in nearby commercial areas may consider residents around Henson Creek Village to be part of their existing customer base.

## Important Considerations:

- Trade areas vary by retail type
- Ex. A large building/garden store may consider its trade area to be 5-10 miles
- Since trade areas are retailer specific, gaps may be larger or smaller



# DEVELOPMENT SCENARIOS | Specific Uses: Retail

Retail opportunities range from existing shopping plaza redevelopment to integration within a mixed-use development and are amenable parcel, floodplain, and size constraints.



**Shopping Plaza Retail (Redevelopment):** Redevelopment of aging strip retail with focus on vibrancy and reference to historic village.



**Freestanding Retail :** Single-story freestanding retail provides low-density retail options for smaller parcels and parcels with floodplain constraints.



**Ground Floor Retail:** Ground floor retail in mixed-use developments along Livingston Road with focus on daily-use services for area residents.

# RETAIL SECTOR ANALYSIS | Takeaways

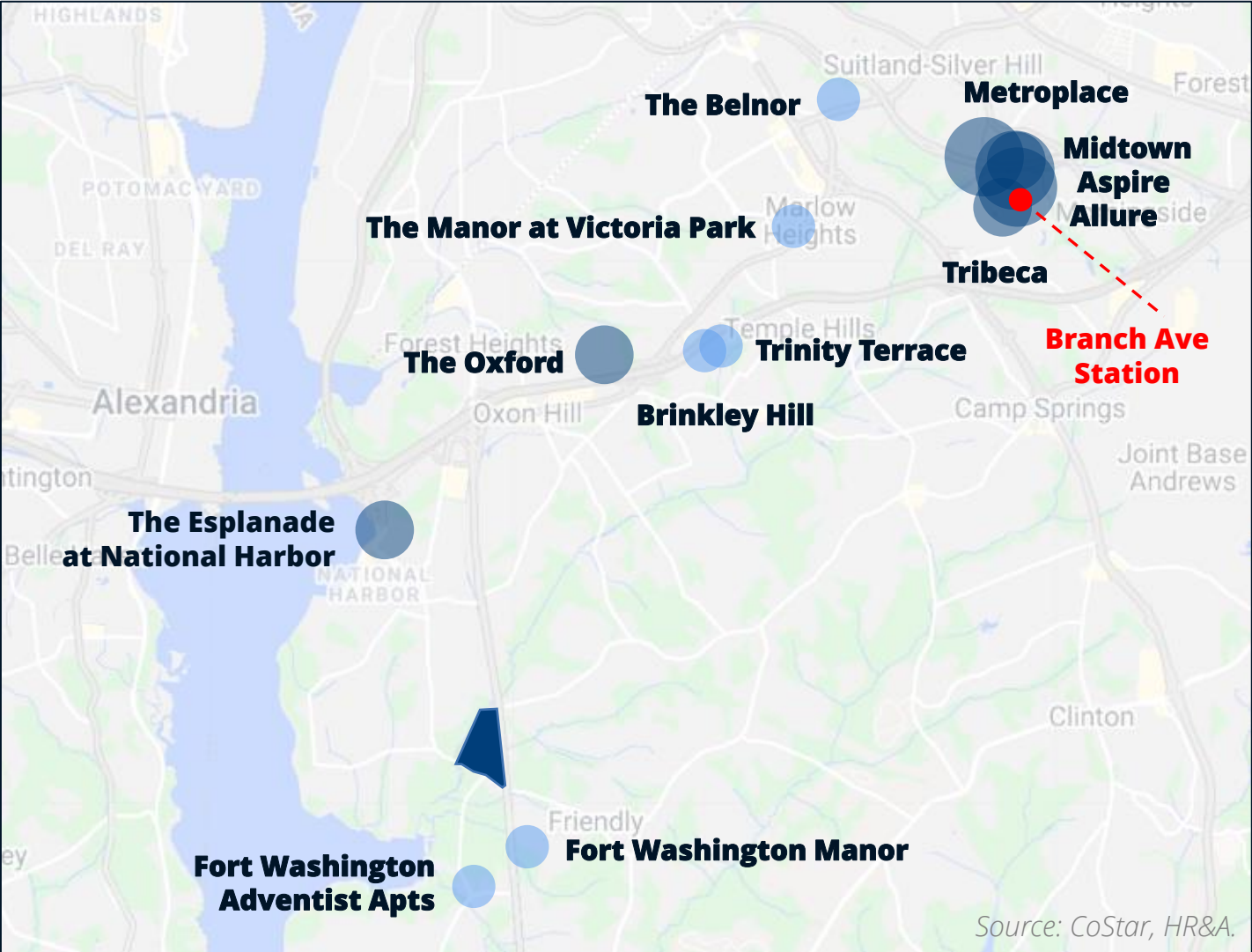
- **Corridor in Flux:** Henson Creek Village is currently **dominated by older, auto-oriented uses**, but a **large share of the corridor's retail footprint is awaiting redevelopment**, which could alter the character of the neighborhood.
- **Unmet Neighborhood Retail Needs:** A shift toward **neighborhood-serving retail uses and amenities** would help satisfy substantial unmet demand from nearby residents.
- **Growing Market for Pedestrian-Oriented Retail:** Increasing population density in and around the Corridor in line with trends in nearby walkable nodes will **increase** Henson Creek Village's **nearby customer base** and increase the corridor's **activity level and appeal**.
- **Need for Placemaking:** Successful nearby retail projects place a **heavy emphasis on placemaking and shopper experience** by mixing active uses (e.g. National Harbor) or creating traditional suburban retail amenities (Tanger Outlets). **Redeveloping Henson Creek** into a **natural amenity** may support corridor placemaking.



# RESIDENTIAL ANALYSIS | Geography of Recent Multifamily Projects

Since 2000, new **market-rate** development has been focused around the **Branch Ave Station** as well as at **National Harbor and Oxon Hill**.

New **affordable** projects have been built in existing residential communities, including two in the **Fort Washington/Friendly** area.

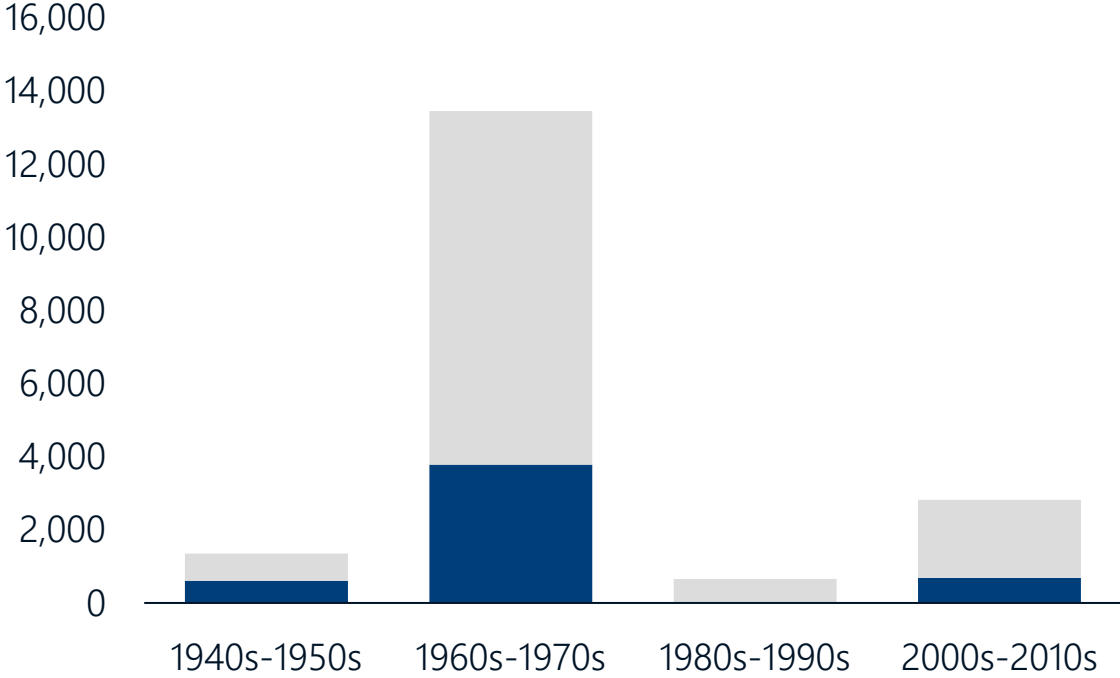


# RESIDENTIAL ANALYSIS | Building Age

Most of the area’s – and the County’s – multifamily housing was **built in the 1960s and 1970s**. While some of the area’s older buildings have been renovated since 2000, most have not.

**Number of Units by Decade**

■ Renovated Since 2000    ■ Not Renovated



Source: CoStar, HR&A

# DEVELOPMENT SCENARIOS | Housing Typologies

Demand for housing in the area remains high, at nearly **1,500 units per year**. Several new housing types could help meet that demand in Henson Creek Village.



**Townhomes:** Attached Single-Family homes face low supply and high demand in the area, with recent success in nearby Suitland.



**Garden Apartments:** With building footprints up to 60K SF, Low/mid-density garden style residential is commonly utilized throughout the County to accommodate many housing units on a large parcel.



**Multi-Family:** Although more common locally around transit nodes, mixed-use development consisting of multi-family with ground floor retail below presents an opportunity to significantly increase density within a smaller building footprint.

# RESIDENTIAL ANALYSIS | Takeaways

- Henson Creek Village is surrounded by a relatively **low-density community of mostly older, single-family and multifamily** residences.
- In recent years, adjacent **neighborhoods to the north have seen a healthy market-rate multifamily market**, with increased rates of new construction and absorption, higher rents and decreasing vacancy. In addition, a number of **new affordable projects have been built** throughout the study area in recent years.
- The most **rapidly growing nearby neighborhoods benefit from amenities** (e.g. waterfront and shopping at National Harbor) and **convenience** (near Beltway and/or Branch Ave. Station), qualities less present currently at Henson Creek Village.
- Improving Henson Creek Village's image via **open space and streetscaping improvements** and **developer partnerships** may be critical to capturing a share of the study area's residential demand.

# RECOMMENDATIONS | Short-Term Improvements

Short-term recommendations prioritize placemaking efforts and walkable infrastructure improvements with the goal of increasing area appeal to housing developers and high-quality retailers.



**Programming:** Support a sense of community and local identity through farmers markets, community festivals, and local events.



**Streetscaping:** Accessibility and appeal both to pedestrians and commuters will benefit The Village as it transitions toward a walkable and vibrant downtown, and includes improvements to sidewalks and roadways, lighting, seating areas, and trash/recycling receptacles.



**Trail Access:** A trailhead parking area will drive increased utilization of Henson Creek Trail; In conjunction with access paths into the Village, this initiative will establish the trail as the central access route for non-auto transportation to The Village.

## **Analysis** | Conclusion and Next Steps

- Although currently auto-oriented and suburban, **Henson Creek Village is well-positioned to support vibrant and walkable new development.**
- **Placemaking improvements will be critical** in the short term to increase the area's market appeal and further the corridor's vibrancy and sense of community.
- Continued support from County leadership will help lay the groundwork to **support desired types of amenities and development and increase the feasibility** of new projects.
- Continued coordination with nearby residents and local businesses will **ensure that the Village meets the needs and desires of the community** going forward.



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