



JULY 2018

# Morgan Boulevard

AND VICINITY STUDY AND ACTION PLAN

Prepared by **AECOM** for the Maryland-National Capital Park and Planning Commission,  
Prince George's County Planning Department



# Abstract

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The 2018 *Morgan Boulevard and Vicinity Study and Action Plan* evaluates market supportable uses at key sites and recommends a set of strategies and actions to help facilitate the redevelopment of key sites in the study area. The study is within the 2010 Approved Subregion 4 Master Plan and Endorsed Sectional Map Amendment and implements recommendations from the approved master plan. This document contains text, photos, illustrations and maps of the study area.



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Prepared by **AECOM** for The Maryland-National Capital Park and Planning Commission,  
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Prince George's County Planning Department

14741 Governor Oden Bowie Drive

Upper Marlboro, MD 20772

[www.pgplanning.org](http://www.pgplanning.org)

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# Table of Contents

<b>Executive Summary</b> .....	<b>1</b>
<b>Changing Context</b> .....	<b>3</b>
<b>Socioeconomics</b> .....	<b>5</b>
Population and Household Characteristics.....	5
<b>Recent Plans &amp; Studies</b> .....	<b>7</b>
<i>Approved Subregion 4 Master Plan and Sectional Map Amendment</i> , June 2010 .....	7
<i>Economic Drivers and Catalysts: A Targeted Economic Development Strategy for Prince George’s County</i> , May 2013.....	8
<i>Plan 2035: Prince George’s County Approved General Plan</i> , 2014.....	8
<i>Third Interim Narrative on Competitive Advantages in the Regional Economy</i> , 2013.....	8
<i>Prince George’s County High-End Retail Market Analysis</i> , 2016 .....	8
<i>Prince George’s County Retail Market Analysis</i> , 2015.....	9
<i>Prince George’s County Retail Marketability and Competitiveness Study</i> , 2016.....	10
<b>Real Estate Market</b> .....	<b>11</b>
Area Development .....	11
Residential .....	11
Assisted Living/Senior Housing .....	12
Retail .....	12
Office.....	14
Medical Office.....	14
Cinema.....	15
<b>Vision for the Study Area</b> .....	<b>16</b>
<b>Projected Future Demand By Use</b> .....	<b>16</b>
Assisted Living/Senior Housing .....	16
Retail .....	17
Office.....	17
Medical Office.....	17
Cinema.....	17
<b>The Amateur Sports Facility Industry</b> .....	<b>19</b>
The Local Market.....	21
Stakeholder Feedback.....	23
Case-Study Facilities .....	24
Sports Market Summary Findings.....	26

<b>Regulatory Framework</b> .....	<b>28</b>
Key Sites – Former Landover Mall Area (Landover Gateway) .....	31
Key Sites – FedExField Area .....	31
Key Sites – Morgan Boulevard Metro Area .....	33
<b>Proposed Active Adult/Wellness Community</b> .....	<b>35</b>
<b>Proposed Amateur Sports and Entertainment Destination</b> .....	<b>37</b>
<b>Overall Connectivity</b> .....	<b>39</b>
<b>Stakeholder Engagement and Public Feedback</b> .....	<b>40</b>
<b>Action Plan</b> .....	<b>41</b>
<b>Acknowledgements</b> .....	<b>43</b>

## Figures

Figure 1. Artist’s collage of the potential activities within an amateur sports and entertainment venue. ....	1
Figure 2. Artist’s depiction of a potential open space within an active adult/wellness community surrounded by cultural destinations, retail, and healthcare amenities. ....	2
Figure 3. Context of Development Patterns in Prince George’s County. ....	3
Figure 4. Morgan Boulevard and Vicinity Area as of 2018 .....	4
Figure 6. Population by age in Prince George’s County and Subregion 4, 2015. ....	5
Figure 5. Race, 2015 .....	5
Figure 7. Educational Attainment, Prince George’s County and Subregion 4, 2015 .....	6
Figure 8. The Subregion 4 Master Plan highlights development plans in several areas .....	7
Figure 9. Household Spending, 2015 .....	13
Figure 10. Percentage of Drive Time Market Population that is “Moviegoers” .....	18
Figure 11. Diagram depicting study area zoning designations .....	28
Figure 12. Land use diagrams excerpt from the approved 2010 Subregion 4 Master Plan. ....	29
Figure 13. Conceptual regulating plan diagram for the former Landover Mall area excerpt from the 2010 Approved Subregion 4 Master Plan .....	30
Figure 14. Potential street grid and land-use designations for the land surrounding FedEx Field excerpted from the Subregion 4 Master Plan .....	31
Figure 15. Conceptual regulating plan diagram for the Morgan Boulevard Metro area excerpted from the Subregion 4 Master Plan. ....	32
Figure 16. Artist’s depiction of a potential open space within the active adult/wellness community surrounded by cultural destinations, retail, and healthcare amenities. ....	36
Figure 17. Artist’s collage of the potential activities within an amateur sports and entertainment venue. ....	37
Figure 18. Possible sites for an amateur sports venue .....	38

## List of Maps

Map 1. Subregion 4.....	2
Map 2. Morgan Boulevard Study Area.....	2
Map 3. Diagram depicting generalized land ownership at the Morgan Boulevard Station area. (2017).....	34
Map 4. Proposed primary public road connections, park space, and development areas near the Morgan Boulevard Station area.....	34
Map 5. Proposed general alignment of future trail and bus connectivity.....	39

## List of Tables

Table 1. Near-term market potential.....	1
Table 2. Prince George's County Retail Space Summary.....	12
Table 3. Existing and Proposed Retail Space, Prince George's County.....	12
Table 4. Housing Tenure, Prince George's County and Subregion 4, 2015.....	13
Table 5. Prince George's County Office Space Summary.....	14
Table 6. Existing and Proposed Office Space, Prince George's County.....	14
Table 7. Prince George's County Medical Office Space Summary.....	15
Table 8. Existing and Proposed Medical Office Space, Prince George's County.....	15
Table 9. Cinemas within a 15-minute Drive Time of the Morgan Boulevard Study Area.....	15
Table 10. Demand Estimate for Assisted Living, Prince George's County.....	16
Table 11. Estimated Screen Demand, 15-Minute Drive Time, Morgan Boulevard Site.....	17
Table 12. Publicly Accessible Indoor & Outdoor Facilities in Prince George's County.....	19
Table 13. Total Youth Sport Annual Visitor Spending (Billions).....	19
Table 14. Tournaments Hosted in Prince George's County.....	20
Table 15. Types of Improvements/Renovations Added to Youth Sports Facilities.....	20
Table 16. Publicly Accessible Indoor & Outdoor Facilities in Northern Virginia.....	22





**Figure 1.** Artist's collage of the potential activities within an amateur sports and entertainment venue.

# Executive Summary

The multi-faceted purpose of the study is to:

- Supplement and elaborate on the recommendations of the 2010 *Approved Subregion 4 Master Plan and Sectional Map Amendment* (Subregion 4 Master Plan).
- Analyze changing market conditions and influences since the Subregion 4 plan approval in 2010.
- Identify market-supportable land uses in the near term (one–five years).
- Offer strategies and actions needed to implement proposed concepts.
- Provide public officials strategies to aid fiscal and public policy decisions.
- Develop an action plan for accelerating development in concert with the Subregion 4 Master Plan intent.

The market study evaluated the near-term market potential of land uses described in previous plans and other destinations that do not duplicate the economic development activities at other County locations. Table 1 summarizes the findings and rationale.

The market analysis suggests the study area is well positioned to become a regional, potentially national, destination for amateur indoor athletics and sports-focused entertainment while simultaneously becoming Prince George's County's premier destination for active adult, senior living and wellness-based communities. These two ideas

**Table 1.** Near-term market potential

Use	Near-Term Viability in Study Area	Summarized Rationale
Residential	☹️	Modest growth to date, new multifamily projects approved. Competitive locations throughout the County.
Assisted Living/ Senior Housing	😊️	Low vacancy rates in current market, growing target population, lack of graduated-care destinations with cultural and recreation amenities.
Retail	☹️	Regional retail market saturated. Neighborhood-serving retail is still viable.
Office	☹️	High vacancy rates in the region. Projects in the pipeline. Competitive locations in the County.
Medical Office	☹️	Significant projects in the pipeline, market for large-scale medical parks will likely be saturated. Neighborhood-scale health facilities are still viable.
Cinema	☹️	Over-supply of screens within 15-minute drive. New cinema to be built near hospital.
Amateur Sports Venue (Indoor)	😊️	Industry growing, insufficient existing facilities, geographic advantage.



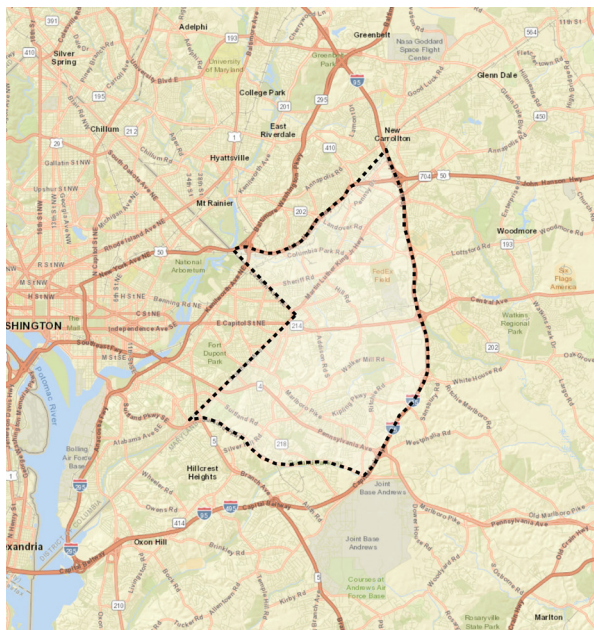
**Figure 2.** Artist's depiction of a potential open space within an active adult/wellness community surrounded by cultural destinations, retail, and healthcare amenities.

complement each other and fit within the current approved land use and zoning framework.

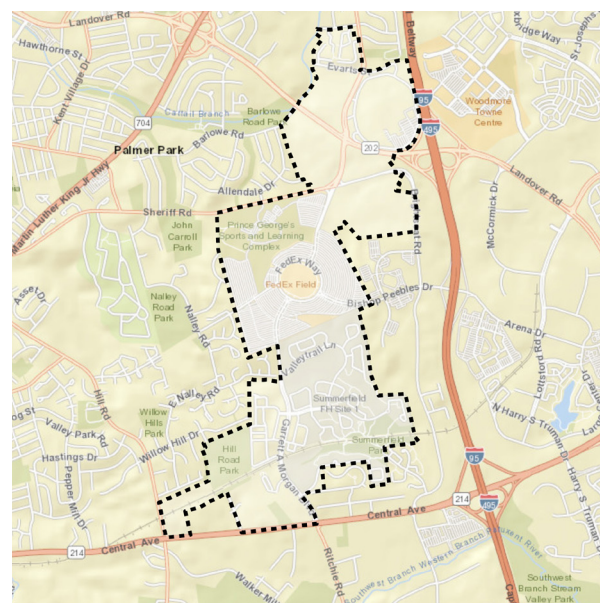
The proposed indoor amateur sports and entertainment venue will differentiate itself within the market through its scale and the level of integrated complementary amenities.

The proposed active adult/wellness community would be a mixed-use residential community designed for the needs of seniors, but not exclusively age-restricted. The community would be large enough to accommodate a variety of lifestyles, price points, graduated-care settings, and housing types with significant integrated retail, recreational, cultural, and healthcare amenities.

**Map 1.** Subregion 4



**Map 2.** Morgan Boulevard Study Area



# Changing Context

Over the past several years, multiple large-scale mixed-use, transit-oriented developments have been established in Prince George's County, altering the landscape and shaking up traditional County development patterns. The redeveloped Prince George's Plaza is becoming a retail destination for County residents; the mixed-use transit center development around New Carrollton has attracted several large-scale office tenants, including the federal Internal Revenue Service and Kaiser Permanente; and Largo Town Center will soon be the site of a new, state-of-the-art regional hospital. National Harbor along the Potomac River has become a regional shopping and entertainment destination since its opening in 2008. New development in the County points to a shift from traditional suburban development patterns toward a pattern of denser, walkable, transit-oriented destination centers with a more urban look and feel, reflecting changing

County planning and development priorities, shifting demographics, and evolving regional and national market conditions.

Plans for the Morgan Boulevard study area have evolved with the County's changing planning context. The expectation that the Federal Bureau of Investigation (FBI) would develop an office at the former Landover Mall site, now a large, vacant lot, shaped plans for the study area, which had to be scrapped when the FBI decided not to locate there. The Subregion 4 Master Plan for Morgan Boulevard and the surrounding area, approved in 2010, envisioned development in the area becoming denser and more transit-oriented, but the uncertainty over who the investors and tenants of the site would ultimately be, along with fragmented property ownership around the site, have stalled redevelopment.

**Figure 3.** Context of Development Patterns in Prince George's County

## County Context

### College Park

- University of Maryland

### Prince George's Plaza

- Retail Destination

### New Carrollton

- Mixed Use Transit Center (IRS, Kaiser Permanente)

### STUDY AREA

### Largo Town Center

- Regional Medical Center
- Relocated County government offices
- Indigo mixed use development

### Joint Base Andrews

- Regional Employer

### National Harbor

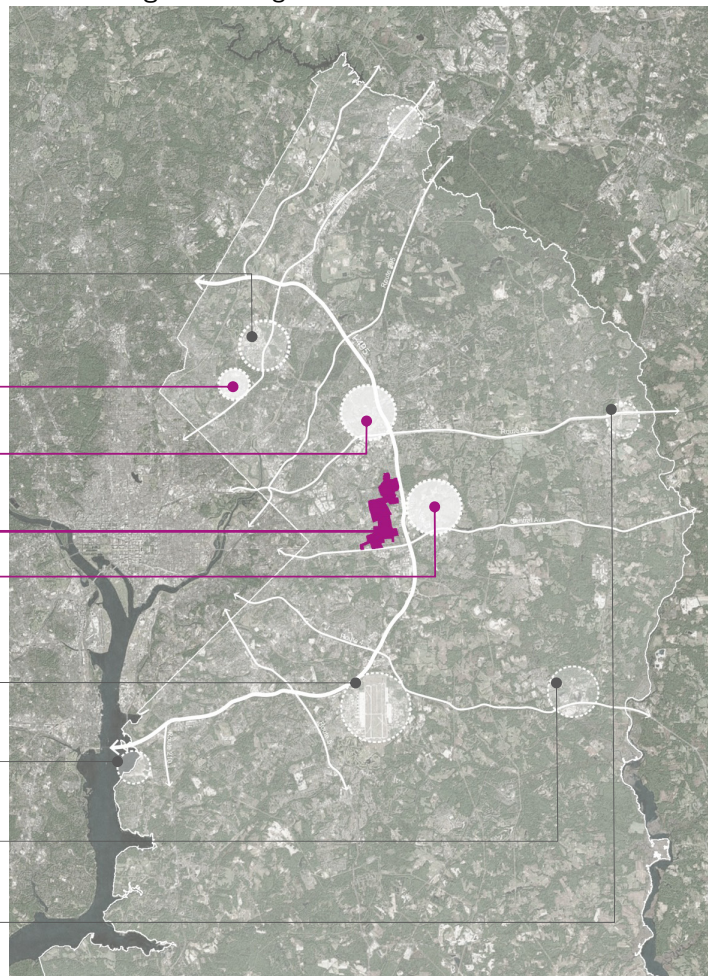
- Regional Entertainment

### Upper Marlboro

- County Seat

### Bowie

- Additional Retail/Residential



**Figure 4.** Morgan Boulevard and Vicinity Area as of 2018

## 2018 Status

### **Glenarden Apartment Site**

- Ongoing residential development

### **Former Landover Mall site**

- Long-term land holding

### **Approved Development**

- 300 housing units

### **FedEx Field**

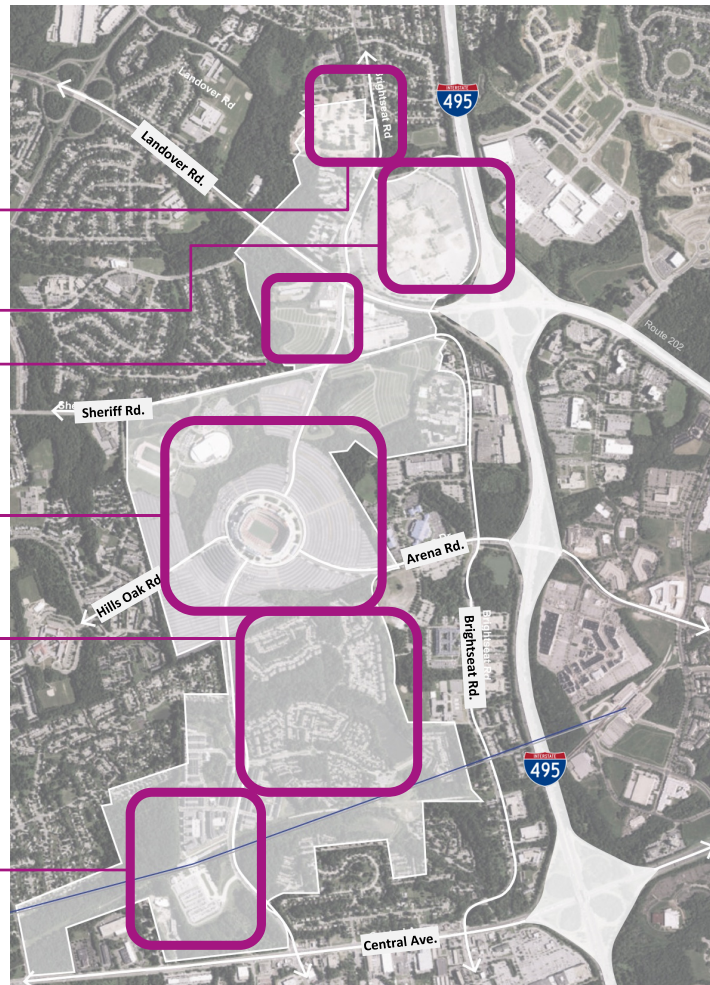
- County committed to keeping Redskins

### **The Villages at Morgan Metro**

- Recent investment in existing buildings

### **Morgan Blvd. Metro Center**

- No development south of the station since it opened
- WMATA to sell surplus property along Central Avenue
- Gray property becomes new parkland



# Socioeconomics

Changing County development patterns reflect changing demographics in Subregion 4 and the County overall.

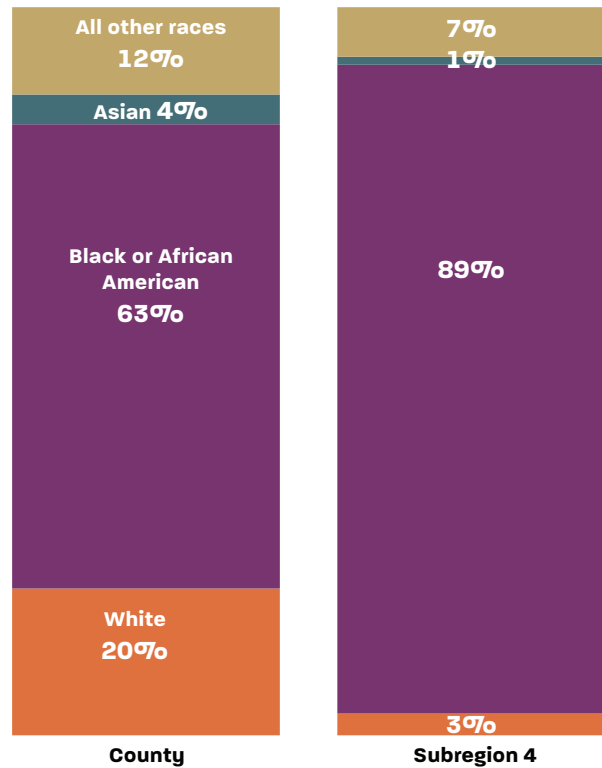
## Population and Household Characteristics

To assess how the County and the study area have evolved since the 2010 Subregion 4 Master Plan was adopted, this analysis compares the latest demographic and economic data available for the County and Subregion to the information in the Master Plan. Current trends in growth and change within the County and Subregion will inform study recommendations and outcomes, and shape how and where development will be focused in the future.

### POPULATION & HOUSEHOLDS

Subregion 4 makes up about 6 percent of the land area of Prince George's County. The Subregion's 2015 population, 128,300 people, was about 14 percent of the County's total population of 887,903. Between 2008 and 2015, the Subregion lost about 3 percent of its population, while the County gained nearly 4 percent. But, Subregion 4 only lost about 0.2 percent of its households over the same period. The number of households in Prince George's County increased by 4 percent between 2008 and 2015. Household sizes decreased slightly in both the Subregion and the County during the same period. In 2015, the average household size in Prince George's County was 2.78 persons. Subregion 4's 2015 average household size was slightly smaller than the County as a whole, at 2.67 persons.

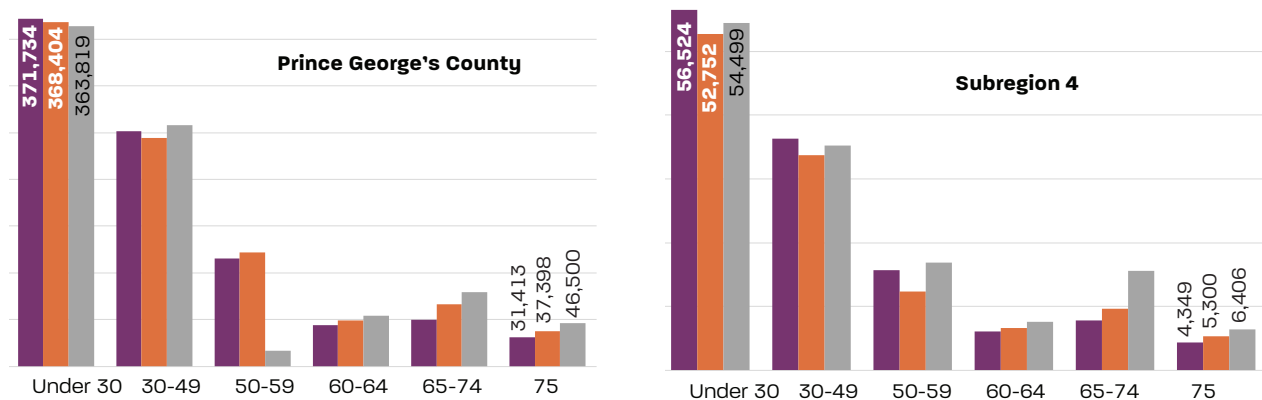
**Figure 5. Race, 2015**

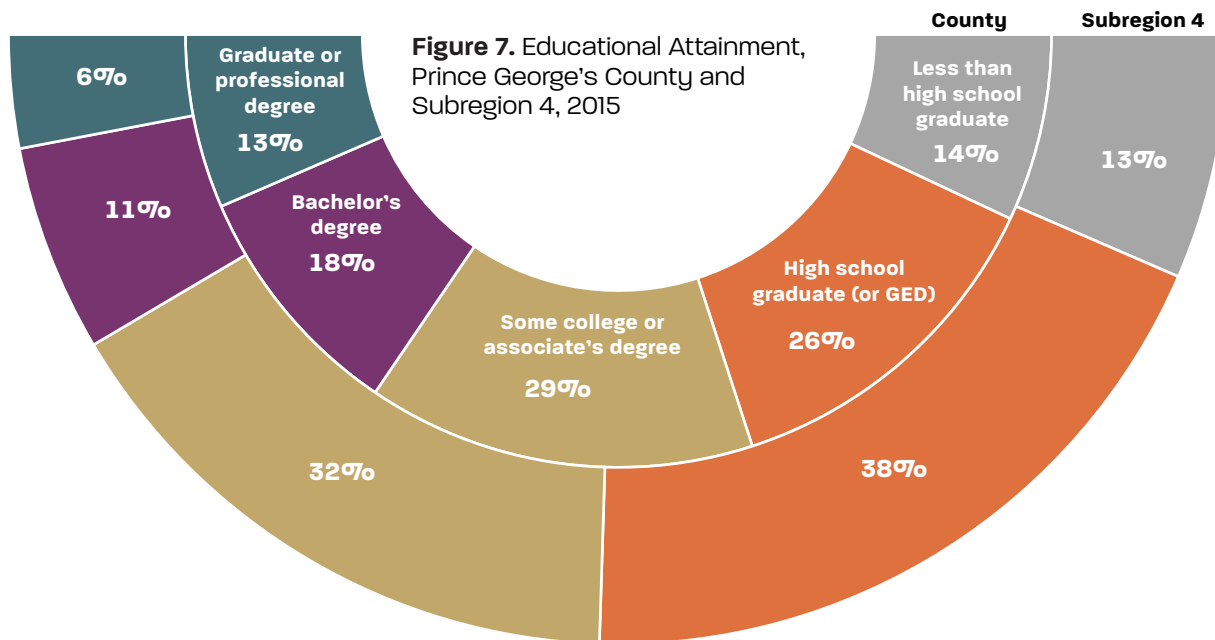


### RACE & ETHNICITY

In 2015, about 63 percent of Prince George's County's population identified as black or African American. About 20 percent identified as white, and the remaining population identified as some other race. In Subregion 4, 89 percent of residents identified as black or African American, 3 percent identified as white, and 7 percent identified as some other

**Figure 6. Population by age in Prince George's County and Subregion 4, 2015**





**Figure 7.** Educational Attainment, Prince George's County and Subregion 4, 2015

race. About 16 percent of Prince George's County residents claimed Hispanic or Latino origin in 2015; in Subregion 4, 7 percent identified as Hispanic or Latino.

**AGE**

The median age of residents in Subregion 4 in 2015 was 34.8, slightly younger than the County as a whole, which had a median age of 35.8. Between 2010 and 2015, both the County and the Subregion saw significant increases in persons aged 65 and older; persons between the ages of 65 and 74 increased by 23 percent in Subregion 4, and by 33 percent in the County as a whole. Persons over the age of 75 increased by 22 percent in Subregion 4 and 19 percent in the County as a whole during the same period.

**EDUCATIONAL ATTAINMENT**

In 2015, 26 percent of Prince George's County residents over the age of 25 had received a high school diploma (with no further schooling), 29 percent had some college or an associate's degree, 18 percent had a bachelor's degree, and 13 percent had a graduate or professional degree. In Subregion 4, 38 percent of residents over the age of 25 had a high school degree

(with no further schooling), 32 percent had some college or an associate's degree, 11 percent held a bachelor's degree, and about 6 percent had a graduate or professional degree.

**HOUSEHOLD INCOME**

Household income is an important measure for understanding the spending power of a particular population. In 2015, median household income in Prince George's County was \$73,886. Median household income for Subregion 4 was \$57,300, nearly \$17,000 less than the County as a whole.

Generally, the higher the household income, the more discretionary income the household can spend on non-essentials. This is something that retailers look for when deciding where to locate their businesses. Measuring the percentage of households that earn more than \$75,000 per year is a good benchmark for understanding how many residents have significant discretionary spending power. In Prince George's County overall, about 50 percent of households earned more than \$75,000 per year; in Subregion 4, about 35 percent of households earned more than \$75,000 per year.

# Recent Plans & Studies

As part of this analysis, AECOM reviewed recent plans and studies relevant to the study area to determine what information from these plans could be used to inform the economic analysis portion of this study, and what information would need to be updated to reflect current market conditions.

## ***Approved Subregion 4 Master Plan and Sectional Map Amendment, June 2010***

The study area used for this analysis is the same study area used in the Subregion 4 Master Plan, which was adopted in 2010. Subregion 4 is approximately 29 square miles, and is bordered by US 50 to the north, I-95/I-495 to the east, Suitland Parkway to the south, and the District of Columbia to the west.

The master plan includes demographic and economic summaries of the study area, and contains recommendations for land use, community design, housing, community revitalization, transportation, public facilities, parks/open space, and economic development.

Key recommendations for economic development in the study area include:

- Identifying tax increment financing locations to promote neighborhood-serving commercial development
- Developing regulatory and incentive programs that encourage reinvestment in blighted residential and industrial areas
- Providing physical buffers between residential neighborhoods and industrial areas

**Figure 8.** The Subregion 4 Master Plan highlights development plans in several areas

## Subregion 4 Master Plan

### **Landover Gateway Center**

- “Focus High Density Condominium and apartment living” (p.64)
- “Direct commercial/retail development” (p.64)
- Significant office development

### **FedEx Field**

- “Future FedExField parking lot site : mixed-use infill redevelopment” (p.64)
- “Conduct a feasibility study for development of regional sports facilities in the surrounding vicinity” (p. 150)

### **Summerfield (The Villages)**

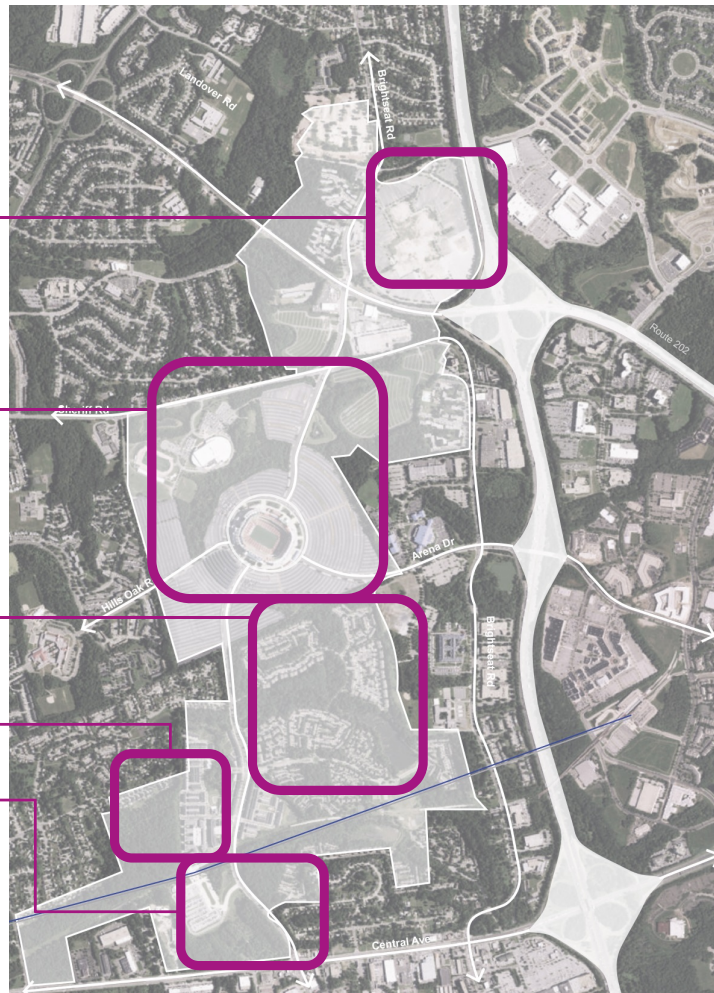
- Future public institutional use - i.e. community college (p.65)

### **Hill Road Park**

- New TOD development

### **Morgan Blvd. Metro Center**

- “Urban, mixed use TOD development” (p. 146)
- “Ground floor retail, townhouse/multi-family housing”
- “Distinctive, high-quality development would frame Central Ave.” (p. 146)



Nine redevelopment opportunity sites were identified in the plan, including the FedExField parking area. The Subregion 4 Master Plan recommends that the County “encourage the development of a mixed-use village center that supports the activity of the FedExField stadium and possesses a character that complements the adjacent established areas.” The plan also considers the section of Central Avenue between Norair Avenue and Brightseat Road an opportunity area for redevelopment. This section of Central Avenue borders the Morgan Boulevard study area to the south. The Subregion 4 Master Plan recommends redeveloping vacant commercial properties with two- and three-story mixed commercial uses.

### ***Economic Drivers and Catalysts: A Targeted Economic Development Strategy for Prince George’s County, May 2013***

Based on analysis of economic drivers in Prince George’s County, this report recommends that Prince George’s County focus on attracting four high-growth industry clusters as part of an overall economic development strategy: federal government; business services; healthcare and life sciences; and information, communications, and electronics. The report outlines strategies for attracting and retaining those industries, including providing dedicated staff support, prioritizing incentives based on the four targeted industry clusters, and focusing on making workforce connections to the industry clusters.

### ***Plan 2035: Prince George’s County Approved General Plan, 2014***

Prince George’s County’s General Plan, adopted in 2014, is the overarching guidance document for planning and land use in the County. The plan recommends goals, policies, and strategies for land use, transportation, economic development, environmental quality, housing, neighborhood development, historic preservation, public health, and public facilities. The plan also summarizes existing conditions in the County, including socioeconomic trends and indicators, and projects population growth, household formation, housing demand, and job growth. Most of the socioeconomic data cited in the plan dates from the 2010 census.

The plan also summarizes rentable building area and vacancy rates for commercial real estate for the County as of 2013, noting that Prince George’s County

“supplies a disproportionate share of the region’s industrial lands, but commands less than 5 percent of its office market,” and that office vacancy rates are high compared to the region.

### ***Third Interim Narrative on Competitive Advantages in the Regional Economy, 2013***

This study, done for the Prince George’s County Planning Department in 2013, analyzes the County’s economic generators to determine the County’s ability to expand those industries to generate additional growth and economic development.

The study takes an in-depth look at how the federal government’s presence in the County impacts economic development and drives growth, concluding that “the federal government is a critical driver of the Prince George’s County economy. In 2010, the federal government directly employed 24,395 persons in the County and federal purchases from the top 10 clusters analyzed as part of this study supported an additional 26,956 jobs for a total of 51,351 federal or direct federal procurement related jobs, more than one in five jobs located in the County.”

The study also examines the business climate, including the County’s overall perception by the business community, its development processes, infrastructure, and quality of life, and how those factors invite or deter business investment. The study concludes that, “while the County faces economic development challenges, notably a less-educated resident workforce than peer jurisdictions, concerns over the quality of the County’s educational system, and a high crime rate, the County has the potential to reverse the poor performance it experienced over the past business cycle and build on the economic development assets residing in the County.”

### ***Prince George’s County High-End Retail Market Analysis, 2016***

The purpose of this study was to determine the feasibility of attracting high-end luxury retail to Prince George’s County. The study provides a high-level assessment of the national high-end retail market, and suggests strategies for attracting more high-end retail to the County. The study suggests that high-end retailers are attracted to vibrant, walkable lifestyle and town center-type developments, as well as transit-oriented developments, of which the County has several. The study also notes that, while attracting “true luxury,” designer-brand retail





PHOTO BY RYAN ORAUN/PRINCE GEORGE'S COUNTY PLANNING DEPARTMENT

FedExField, the home of the NFL Washington Redskins, draws Sunday gameday traffic to the Morgan Boulevard study area.

is probably not feasible for Prince George's County, given current market conditions, "attainable luxury/high-end" retailers could be attracted by the County's existing town/lifestyle centers and transit-oriented developments, such as National Harbor, Westphalia, and Largo Town Center.

The study suggests that, by targeting investment in high growth/preferred growth areas, encouraging mixed-use development, and discouraging over development of suburban retail centers, the County could attract more "attainable luxury" high-end retailers, such as Whole Foods, Apple, Nordstrom, and Lululemon Athletica.

### ***Prince George's County Retail Market Analysis, 2015***

The Prince George's County Retail Market Analysis examines regional retail market trends, supply, demand, and spending leakage.

Key findings of the analysis include:

- Average productivity (sales per square foot) of retail space in Prince George's County is lower than in other comparable communities in the region.
- Newer retail centers (built since 2006) have demonstrated strong market absorption, but

often at the expense of tenants of older shopping centers, which show negative net absorption over the same period.

- According to RCLCO, who conducted the analysis, \$7.2 billion in spending occurs in Prince George's County annually on retail goods and food services, representing the majority of purchases made at shopping centers and retail stores, but nearly \$8.6 billion of retail demand potential is available to Prince George's County.
- This demonstrates a "spending gap"/leakage of \$1.4 billion or approximately 20 percent of current retail expenditures outside of the County. Translating that demand into square feet indicates that Prince George's County can support an estimated total of 20.1 million square feet of high-performing retail space (excluding gas stations and other auto-related uses).
- The current inventory of retail in the County includes 241 shopping centers comprised of approximately 26.4 million square feet of retail space (for shopping centers larger than 10,000 square feet).
- Retail absorption in the County has been positive since 2006 (with the exception of 2008).

The analysis concludes that “the strategy with the greatest potential for growing the County’s retail sales is to attract new households that both live and work in Prince George’s County.”

### ***Prince George’s County Retail Marketability and Competitiveness Study, 2016***

The purpose of the retail marketability analysis was to identify which areas of the County are growing, have stable populations, or are underperforming. The analysis examined how well the site selection criteria used by most major retailers aligns with the County’s socioeconomic characteristics.

The key findings of the analysis include:

- Compared to the rest of the United States, Prince George’s County has high incomes, density, and education capable of supporting high-quality retail.
- The County has a market that is underserved for high-quality retail. Existing higher-quality retailers in Prince George’s County have a “captive market audience.”
- There is a disparity between where the County’s denser population centers are located and where the higher-earning households are – for instance, the highest population densities are mainly within the I-495 Beltway, but the highest-earning households are clustered outside the Beltway to the east.

- The County has “key nodes and clusters” primed for attracting higher-quality development, such as the Hyattsville Arts District and the National Harbor areas, and other areas that are in the process of adding the household and employment density that will further drive retail demand.
- The County’s prime retail locations must compete with the Baltimore-Washington region’s super prime locations with higher population densities and some of the highest incomes and education levels in the United States. Examples of “super prime locations” include counties such as Fairfax and Arlington, parts of the District of Columbia, and the City of Alexandria.

The plans and studies reviewed indicate that, although Prince George’s County is over-supplied with lower- quality, underperforming retail, there are opportunities for higher-end, “attainable luxury” retail, and better- quality, local-serving retail to replace underperforming retail tenants. Although the study area has a higher population density than the western part of the County, incomes are lower, so it will be challenging to attract higher-quality retail in some areas. However, several ongoing developments near the Morgan Boulevard study area, such as the Woodmore Town Center and Largo Station developments, have the potential to become key nodes/clusters that will attract additional quality retail development nearby.



RYAN CRAUN/PRINCE GEORGE'S COUNTY PLANNING DEPARTMENT

The Villages at Morgan Metro is a recently redeveloped garden-style residential apartment community.

# Real Estate Market

## Area Development

The existing Morgan Boulevard study area is home to a mix of uses and amenities. Most prominent is FedExField, the stadium for Washington, D.C.'s National Football League team, the Washington Redskins. The Morgan Boulevard Metro Station, a little less than a mile to the south of the stadium, provides a key link to mass transit. The study area also includes a small shopping center and multiple residential apartment communities.

## Residential

The study area contains several apartment communities, including Century Summerfield at Morgan Metro, a transit-oriented community immediately to the north of the Metro station with a mix of townhomes and apartments still under development, and the Villages at Morgan Metro, a recently redeveloped garden-style residential apartment community. Jericho Residences, immediately to the east of the site, is an active

adult community for adults over the age of 55 that is associated with the Jericho City of Praise Baptist Church on the same site. Several older garden-style apartment communities also surround the study area.

Within the Subregion 4 study area that encompasses the Morgan Boulevard site, there are about 55,000 housing units, which is about 16 percent of the total housing units in Prince George's County. About 44 percent of those units are renter-occupied, 44 percent are owner-occupied, and 12 percent are vacant. The Subregion has about 20,400 multifamily units, which is approximately 19 percent of the total multifamily housing units in the County. The average square footage of a multifamily unit in the Subregion is 895 square feet; in Prince George's County overall, the average multifamily unit is 870 square feet. Despite having slightly more square footage, the average asking rent for a multifamily unit in the Subregion is lower than the average rent for the County: \$1,270 per month in Subregion 4, versus \$1,337 per month for the County as a whole.

**Table 2.** Prince George's County Retail Space Summary

Existing inventory		Vacancy			YTD net absorption	YTD Deliveries	Under construction square feet	All service average rent
Number of buildings	Total square feet	Direct square feet	Total square feet	% vacancy				
2,935	40,249,876	2,104,368	2,120,993	5.3%	(55,330)	136,930	136,930	\$21.26

SOURCE: COSTAR; AECOM, OCTOBER 2017

There are 1,100 multifamily units in the development pipeline for Subregion 4, about 15 percent of the total new units (7,393) proposed for Prince George's County.

Lower asking rents in Subregion 4, as well as convenient access to transit and the recent development of new retail options and amenities, should position the Subregion well for attracting new residents, particularly as other parts of the D.C.-metro region become less affordable.

## Assisted Living/Senior Housing

According to County records, 55 establishments offer a total of 7,851 dwelling units of senior housing in Prince George's County. These establishments include age-restricted housing (independent living, very minimal services), assisted living (lifestyle support services, but no medical care), and graduated care/skilled nursing facilities (all levels of care). The census lists 38 establishments that offer assisted living services, categorized under NAICS Code 623312. This category does not include continuing care/skilled nursing facilities or independent senior living communities.

As Baby Boomers age, the demand for assisted living and graduated care facilities will continue to increase nationwide. A significant increase over the past decade in the share of residents over age 65, in both Subregion 4 and the County as a whole, reflects these nationwide trends.

Considering the needs of aging residents in planning for the future of the County and the Subregion, particularly those residents who would prefer to "age in place" as much as possible, will become increasingly important in the coming years.

## Retail

The commercial uses in the immediate Morgan Boulevard study area are limited, and include a used car sales establishment, the Arena Plaza Shopping Center, and a liquor store. The Arena Plaza Shopping Center is severely underperforming; the remaining

**Table 3.** Existing and Proposed Retail Space, Prince George's County

	Existing retail	Proposed retail	% Additional retail SF
Prince George's County	40,147,568	1,262,083	3%
Subregion 4	5,826,205	189,368	3%

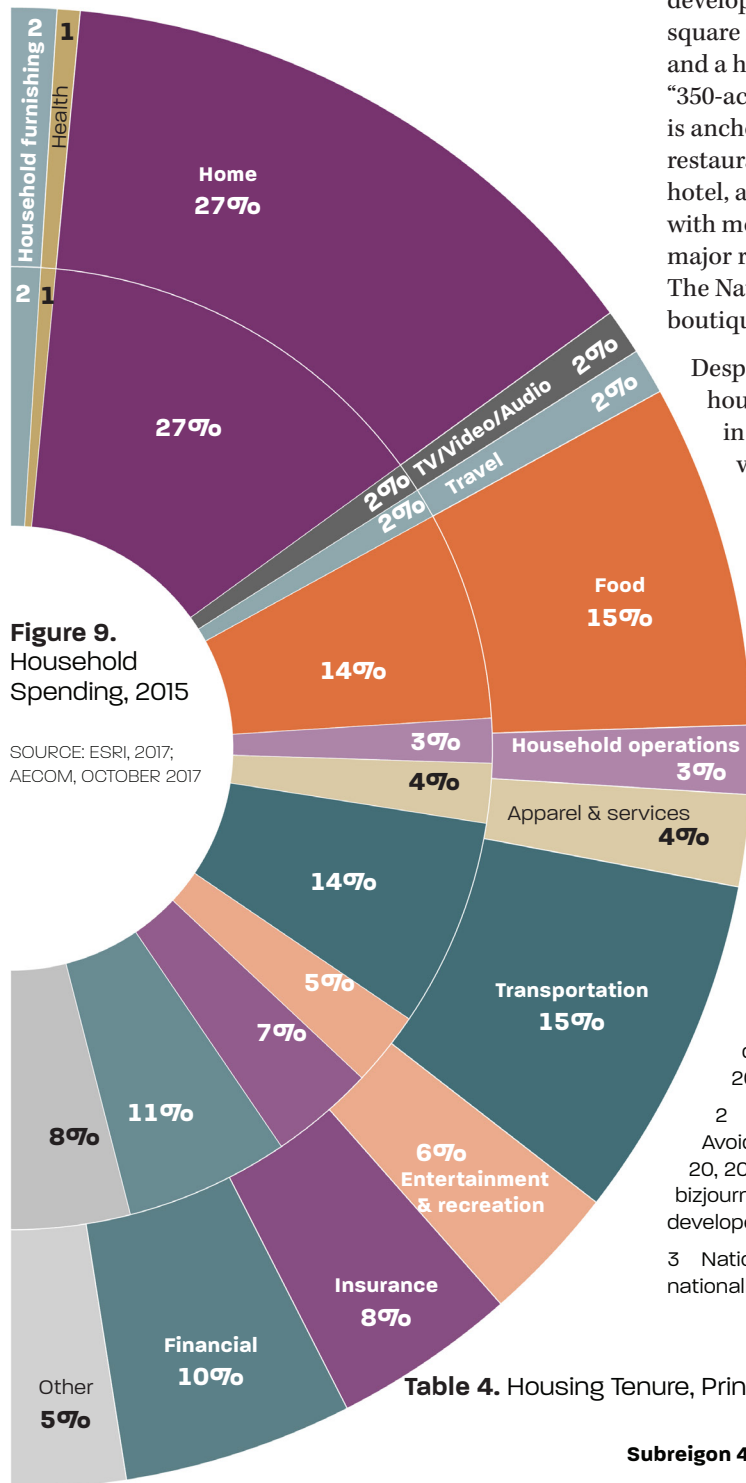
SOURCE: COSTAR; AECOM, 2017

tenants include a beauty supply store, a gym, several small salons, and a small Chinese restaurant. There is also a large vacant parcel just to the north of the shopping center: the site of the former Landover Mall. The stand-alone liquor store sits opposite Brightseat Road from the former mall site.

The greater Subregion 4 study area has about 5.8 million square feet of retail space, about 15 percent of the County's overall retail square footage. Currently, an additional 189,368 square feet of retail space is proposed for Subregion 4. Nearly 1.3 million square feet of additional retail space is proposed for the County as a whole.

Multiple retail studies have been conducted for the County in the past several years. According to two recent retail studies by RCLCO, the county is somewhat over-supplied with lower-quality retail offerings, but has a market for higher-quality retail uses that is currently underserved. According to REIS, national retail vacancy rates were about 10 percent for the second quarter of 2017, so the County has a significantly lower average retail vacancy rate (nearly 5 percentage points less) than the nation overall.

In recent decades, multiple mixed-use, transit-oriented, and "town center" communities have been developed throughout the County and the region. Woodmore Town Center, the closest large mixed-use development to the study area, will feature 700,000 square feet of retail, 1 million square feet of office space, 922 residential units, two hotels



**Figure 9.**  
Household  
Spending, 2015

SOURCE: ESRI, 2017;  
AECOM, OCTOBER 2017

and a conference center at build-out.<sup>1</sup> Westphalia Town Center, in Upper Marlboro, is also under development, and will ultimately feature 300,000 square feet of retail, 400 units of multifamily housing, and a hotel.<sup>2</sup> The National Harbor development, a “350-acre resort destination” on the Potomac River, is anchored by an MGM casino and features multiple restaurants, 18,000 square feet of high-end retail, a hotel, and a 3,000-seat theater.<sup>3</sup> A Tanger Outlets mall, with more than 160 retail shops, including several major retailers, opened at National Harbor in 2013. The National Harbor development also features some boutique and higher-end retail.

Despite a difference of nearly \$17,000 per year in household income, household spending patterns in Subregion 4 and Prince George’s County are very similar, as shown in Figure 3. Households in Subregion 4 spend about 27 percent of their income on housing, the same share as the County overall. For Subregion 4, this comes to an average of a little more than \$14,000 per year; for Prince George’s County, average household spending on housing is closer to \$20,000 per year.

Households in Subregion 4 spend slightly more of their incomes on entertainment and recreation, 6 percent, than the rest of the County spends (5 percent). Average household spending on entertainment and recreation in Subregion 4 is about \$3,000

1 Prince George’s County Economic Development Corporation. “Developments and Projects.” <http://www.pgcercd.com/business-development/developments-projects>. October 23, 2017.

2 Sernovitz, Daniel J. “Westphalia Developers Aim to Avoid Default on Massive Town Center Project,” October 20, 2016. Washington Business Journal. <https://www.bizjournals.com/washington/news/2016/10/20/westphalia-developers-aim-to-avoid-foreclosure.html>. October 23, 2017.

3 National Harbor. “About National Harbor.” <https://www.nationalharbor.com/about/> October 23, 2017.

**Table 4.** Housing Tenure, Prince George’s County and Subregion 4, 2015

	Subregion 4	Percent of total	County	Percent of total
Total Housing units	54,484	100%	337,888	100%
Renter occupied	23,806	44%	188,392	56%
Owner occupied	24,030	44%	123,081	36%
Vacant	6,648	12%	26,415	8%

SOURCE: ESRI, 2015; AECOM, OCTOBER 2017

**Table 5.** Prince George's County Office Space Summary

Existing inventory		Vacancy			YTD net absorption	YTD Deliveries	Under construction square feet	All service average rent
Number of buildings	Total square feet	Direct square feet	Total square feet	% vacancy				
1,163	27,472,430	4,152,519	4,175,554	15.1%	511,287	60,840	75,000	\$22.15

SOURCE: COSTAR; AECOM, OCTOBER 2017

per year, whereas the average household in the County spends about \$4,000 per year in the same category.

Households in Subregion 4 and the County overall spend the same share of their income on: apparel and services (4 percent, which comes to an average of about \$2,000 per year in Subregion 4 and \$3,000 per year in the County), household furnishings (2 percent, an average of \$1,000 per year in Subregion 4 and \$1,200 per year for the County), and household operations (3 percent, about \$1,500 on average per household in Subregion 4, and about \$2,000 on average for the County as a whole).

According to ESRI data on “spending potential,” most households in Prince George’s County have a higher spending potential for nearly all categories than average; however, most of the households in Subregion 4 fall slightly below the national average spending potential for most categories.

Because of the lower spending potential than the rest of the County, Subregion 4 residents’ retail needs should be considered carefully before new retail is developed in the Subregion. The focus should be on capturing a greater percentage of residents’ spending within the Subregion and the County, and minimizing spending leakages outside the County.

## Office

There are very few office uses in the immediate Morgan Boulevard study area. Within Subregion 4, there is approximately 2.3 million square feet of office space, which is about 8 percent of the County’s total office square footage. However, the 2.2 million square feet of proposed office space in the development pipeline for Subregion 4 will nearly double the existing supply. A little more than half of the proposed office space will be developed as part of the New Carrollton Transit District Development Plan, approved by the

**Table 6.** Existing and Proposed Office Space, Prince George's County

	Existing office	Proposed office	% Additional retail SF
Prince George's County	27,742,581	6,880,808	25%
Subregion 4	2,321,106	2,162,000	93%

SOURCE: COSTAR; AECOM, 2017

County in 2010.<sup>4</sup> Prince George’s County as a whole has about 28 million square feet of office space, with an additional 6.9 million square feet proposed.

The County as a whole will also experience a significant increase in office space: the equivalent of nearly 25 percent of Prince George’s County’s existing office space is currently in the County’s development pipeline. The average vacancy rate for office space in the County, 15.1 percent, is slightly higher than the national average vacancy rate of suburban office space, 14.1 percent, published by CBRE for the third quarter of 2017.<sup>5</sup>

Because of the congested development pipeline and higher vacancy rates for office development in the County and Subregion, asking rents for new office space will likely drop in the next several years, and new office development in the County will slow until vacancy rates drop and rents begin to rise again.

## Medical Office

The proposed 600,000-square-foot Regional Medical Center at Largo Town Center is about a half mile from the Morgan Boulevard study area. Large, centralized hospitals and medical facilities often spur the development of related uses, particularly medical office space, close to the facility. Subregion 4 has

4 Reed, Tina. “Kaiser Permanente Planning Huge Expansion in Prince George’s,” April 26, 2017. Washington Business Journal. <https://www.bizjournals.com/washington/news/2017/04/06/kaiser-permanente-to-expand-with-new-building-near.html>. October 23, 2017.

5 CBRE. “U.S. Office Vacancy Declines to 12.9 Percent in Q3 2017,” October 9, 2017. <https://www.cbre.com/about/media-center/us-office-vacancy-q3-2017>. October 23, 2017.

**Table 7.** Prince George’s County Medical Office Space Summary

Existing inventory		Vacancy			YTD net absorption	YTD Deliveries	Under construction square feet	All service average rent
Number of buildings	Total square feet	Direct square feet	Total square feet	% vacancy				
105	1,903,714	117,033	117,963	6.2%	111,327	60,840	0	\$21.17

SOURCE: COSTAR; AECOM, OCTOBER 2017

about 55,000 square feet of medical office space, with none in the development pipeline. Prince George’s County has about 1.9 million square feet of existing medical office space, with about 963,000 square feet in the development pipeline, meaning that the County will be adding the equivalent of more than half of its existing medical space in the coming months, a significant increase.

Although no new medical office space is proposed for the Subregion 4 study area, there are two significant medical office developments in the County’s development pipeline within about a mile of the Morgan Boulevard study area. The largest development is proposed for a site on Landover Road, and will encompass nearly 730,000 total square feet of medical office space at build-out. The proposed development will have three phases: 100,000 square feet of medical office is proposed for the first phase, 270,000 square feet is proposed for the second, and the final phase will add an additional 360,000 square feet of space. The second proposed development, in the 9400 block of Arena Drive, will feature 60,000 square feet of medical office space.

Additional space for medical office uses is also designated as part of the site plan for the Regional Medical Center, but will not be part of the initial phase of the hospital’s development. In total, 962,900 square feet of additional medical office space has been proposed for the County as a whole.

As with non-medical office development, the enormous influx of new medical office space in the County will most likely slow additional medical office development in the coming years until the new spaces are filled and rents begin to climb.

## Cinema

Within a 15-minute drive of the Morgan Boulevard study area, there are three movie theaters with a total of 34 screens. The closest movie theater, AMC Magic Johnson Capital Center 12, is less than half a mile from the study area and features 11 standard movie screens and an IMAX theater. Within a 30-minute

**Table 8.** Existing and Proposed Medical Office Space, Prince George’s County

	Existing medical office	Proposed medical office	% Additional retail SF
Prince George’s County	1,903,714	962,900	51%
Subregion 4	55,301	0	0%

SOURCE: COSTAR; AECOM, OCTOBER 2017

**Table 9.** Cinemas within a 15-minute Drive Time of the Morgan Boulevard Study Area

Name	Street	City	Zip	Screens
AMC Magic Johnson Capital Center	Shoppers Way	Upper Marlboro	20774	12
Regal Bowie Stadium 14	Major Landsdale Blvd	Bowie	20716	14
Academy Stadium Theaters	Greenbelt Road	Greenbelt	20770	8

SOURCE: ESRI, 2015; AECOM, 2017

drive of the Morgan Boulevard site, residents have more than 10 movie theaters to choose from, with a variety of viewing, dining, and seating options.

According to the Motion Picture Association of America, annual national admissions have remained steady since 2015 at 1.32 billion tickets sold, after dipping slightly in 2014 down to 1.27 billion. Since 2007, the year with the largest sales volume was 2009, peaking at 1.42 billion tickets sold. Statistics show that demand for movie ticket sales has remained steady in the United States since the 2008 recession.

Lack of growth in movie ticket sales nationwide, a trend which has tracked along with the rise in media-viewing alternatives to traditional television and movie rental, such as Netflix and Hulu, does not create ideal conditions for strong growth in this sector in the coming years.

# Vision for the Study Area

Based on current County growth and development patterns, changing County and Subregion demographics, and overall market trends, the vision for the Morgan Boulevard study area has evolved into that of a regional destination for sports-focused, health and wellness-oriented uses that better capture and use the energy generated by the existing stadium to attract users interested in amateur indoor athletics, sports-centered entertainment, and active living. This

vision is anchored by a destination amateur sports tournament, training, and entertainment venue; a residential senior community focused on wellness and active living; and a local performing arts center that complements and expands the ability of the Thomas G. Pullen Creative and Performing Arts Academy to share their talents with a larger audience and allows them to welcome more local and regional performing artists to the Subregion.

## Projected Future Demand By Use

### Assisted Living/Senior Housing

According to *Analyzing Senior's Housing Markets*, by Susan B. Brecht, most retirement communities draw from households where the head of household is 75 years of age or older. Additionally, she notes that historically about 70 percent of an assisted living/ graduated-care facility's residents can be expected from within the project's local market area, and that a large proportion of residents relocate from areas within 10 miles of the facility. Another important metric for determining demand for assisted living in a particular market is the number of seniors who own their own homes. Many long-term/graduated-care facilities require a significant entry fee, so having a significant asset, like a home, is a predictor of who will be able to afford long-term or graduated care, and who will need a lower-cost option.<sup>6</sup>

The general criteria used by AECOM to determine demand for assisted living/ graduated care within the Prince George's County market area include:

- Age of householder (65 and older)
- Minimum household income of at least \$50,000 per year
- Homeownership

- Based on an informal telephone survey of state-licensed assisted living facility occupancy in Prince George's County, AECOM assumes an estimate of a 96 percent occupancy rate for these facilities for analysis purposes

Assuming a relatively conservative capture rate of 17 percent of the potential market for age-restricted housing in Prince George's County, and 12 percent of the potential market for assisted living, AECOM estimates that a senior housing development on the Morgan Boulevard site could support roughly 600 units of age-restricted housing, and about 200 units of assisted living, by the year 2020 (800 units total).

One possible model for the proposed senior housing community is Asbury Methodist Village in Gaithersburg, Maryland, a multi-level care facility that features 1,219 units of graduated care senior housing, which include:

- 712 independent apartment homes
- 74 independent villas
- 43 independent "courtyard homes"
- 133 assisted living suites
- 257 skilled care accommodations<sup>7</sup>

6 Brecht, Susan B. *Analyzing Senior's Housing Markets*. Washington, D.C.: Urban Land Institute, 2002.

7 [www.asburymethodistvillage.org](http://www.asburymethodistvillage.org)

**Table 10.** Demand Estimate for Assisted Living, Prince George's County

Homeowners 65, HH income over \$50,000	Occupied assisted living/ senior housing units	Net potential market HHs	Site capture rate	Estimated unit demand for assisted living
32,021	7,520	24,501	7%	1,715

A higher income threshold is used than the recommended national threshold of \$30,000 because of higher housing costs in the D.C.-metro area. Site capture rate is AECOM estimate.

SOURCE: PRINCE GEORGE'S COUNTY; MARYLAND HEALTHCARE COMMISSION; AECOM, OCTOBER 2017



**Table 11.** Estimated Screen Demand, 15-Minute Drive Time, Morgan Boulevard Site

Drive time	Moviewgoing population	Screens per attendee	Screen demand	Screen supply	Additional demand
5	4,419	0.0003	2	12	-10
10	21,580	0.0003	7	12	-5
15	38,308	0.0003	13	22	-9

SOURCE: ESRI; MOTION PICTURE ASSOCIATION OF AMERICA, AECOM, OCTOBER 2017

Facilities like this one offer multiple amenities and services in addition to housing and assisted living/ graduated care. Fitness centers, pools, day spas, and other similar amenities play a key role in making a community like Asbury Methodist Village attractive to seniors interested in maintaining an active lifestyle. Some communities also offer dining and retail options, which might be open to the surrounding neighborhood, depending on the community. The more integrated such a community is with its surroundings, the more opportunities there are for residents to engage with people of all ages, and for people living in the surrounding neighborhoods to enjoy (and support) the onsite amenities. Opening up services and amenities to the broader community means that they do not have to be fully supported by dues or fees paid by the senior living community's residents, and can instead capture local market spending that might otherwise go elsewhere.

## Retail

Overall, retail absorption in the County has been positive since 2006 (with the exception of 2008) and the retail vacancy rate is low compared to the rest of the country. However, because of the multiple mixed-used centers simultaneously being developed throughout the County that have a large retail component (including Woodmore Towne Centre less than a mile from the study area), AECOM recommends that any retail proposed for the Morgan Boulevard site be specifically targeted to support/ complement the other uses proposed for the site. Big-box and strip retail development would most likely not be supportable in this development context.

## Office

A significant amount of office space is already under construction or proposed for Prince George's County and Subregion 4. Because of the congested office development pipeline combined with the relatively high countywide office vacancy rate of 15.1 percent, AECOM does not recommend building additional speculative office space as part of the Morgan Boulevard site development plan.

## Medical Office

If the amount of medical office square footage in the development pipeline for the County is built, the market for medical office space will quickly become saturated despite the increased demand driven by the new regional hospital. Additionally, although medical office vacancy rates are relatively low countywide, at 6.2 percent, with nearly 800,000 square feet proposed for sites within a mile of the Morgan Boulevard site, AECOM does not recommend building speculative medical office space as part of the overall site development plan.

## Cinema

For the purposes of this study, a 15-minute "drive time" metric was used to estimate demand for additional cinema screens. Generally, most cinema goers prefer to attend movie theaters within a 15-minute drive of their home, particularly in more urbanized areas where movie theaters are more plentiful.

Using 2016 national theatrical market statistics from the Motion Picture Association of America, AECOM estimated demand in the market area for additional movie screens. The Motion Picture Association of America publishes statistics on moviegoers by age. The 25-39-year-old age cohort is the group with the largest share of moviegoers — on average, about 23 percent of this population regularly attends movies. They are followed by people aged 60 and older — about 15 percent of people in this age group are considered moviegoers. AECOM used this metric to estimate the number of moviegoers within a 15-minute drive of the Morgan Boulevard site, which came to about 64,000 people, or 15 percent of the total drive-time population.

Residents of the Morgan Boulevard study area already have multiple cinemas to choose from within a relatively quick drive. If study-area residents are willing to drive a little further, 20 minutes or more, the options for movie-viewing become even greater. The preliminary analysis of cinema demand within a 15-minute drive time of the Morgan Boulevard site

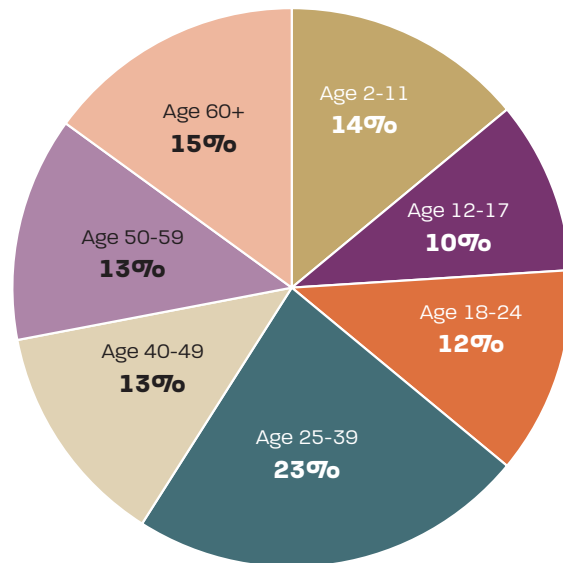


PHOTO BY RYAN CRAUN/PRINCE GEORGE'S PLANNING DEPARTMENT

The Morgan Boulevard Metro Station serves the study area with access to public transit into Washington, D.C.

shows that the study area is already over supplied by as many as 12 movie screens. Additionally, a developer has proposed to demolish the existing AMC Magic Johnson Theater, the closest cinema to the Morgan Boulevard study area, and replace it with a luxury dinner theater cinema, which would satisfy any unmet demand in the drive-time market for a luxury movie viewing experience. Therefore, developing a specialty/luxury cinema would not be feasible for the Morgan Boulevard site, because of an over-supply of screens and a multitude of nearby competitors.

**Figure 10.** Percentage of Drive Time Market Population that is “Moviegoers”



SOURCE: ESRI; MOTION PICTURE ASSOCIATION OF AMERICA; AECOM, 2017

# The Amateur Sports Facility Industry

The amateur/youth sports facility industry has significantly grown in recent years and is very competitive. Despite overall decreases in sports participation in recent years, those participants are spending more and the industry as a whole has grown by 55 percent since 2010.<sup>8</sup>

According to a National Association of Sports Commissions/Ohio University survey of national sports commissions, 40 percent of respondents indicated they were building new facilities and 75 percent indicated they were renovating older facilities. Table 15 indicates where improvements were focused for the facilities that have recently been renovated.

**Table 13.** Total Youth Sport Annual Visitor Spending (Billions)



<sup>8</sup> <http://time.com/magazine/us/4913681/september-4th-2017-vol-190-no-9-u-s/>

**Table 12.** Publicly Accessible Indoor & Outdoor Facilities in Prince George's County

Facility	Location	Offerings
Allen Pond Park	Bowie	3 grass/1 multipurpose field, 3 baseball/softball fields
Allentown Splash, Tennis and Fitness Park	Fort Washington	Swimming pool and tennis courts
AMF Laurel Lanes	Laurel	Bowling lanes
Andrews Air Force Base Golf Courses	Andrews AFB	3 golf courses
Bickford Natatorium at Prince George's Community College	Largo	Indoor swimming pool
Bowie Golf and Country Club	Bowie	Golf course
Bowie Gymnasium	Bowie	2 basketball/5 volleyball courts
Bowie Ice Arena	Bowie	1 ice sheet
Bowie Skate Park	Bowie	Skating rink
Capital Sportsplex	Glenn Dale	2 indoor turf fields
Cosca Tennis Bubble	Clinton	4 indoor tennis courts
Fairland Regional Park	Laurel	1 multipurpose field, 4 softball fields
Fairland Sports and Aquatics Complex	Laurel	Gymnasium, indoor pool, 6 indoor/2 outdoor tennis courts
Gaylord National Resort and Convention Center	National Harbor	470,000 square feet of indoor event space
Prince George's Sports & Learning complex	Landover	Indoor track, swimming pool, outdoor field, indoor court
Show Place Arena	Upper Marlboro	Indoor arena
Silver Stars Gymnastics	Bowie	Gymnasium
Sugar Ray Leonard Boxing Center	Palmer Park	Boxing gym
The Gardens Ice House	Laurel	Ice rink
Tucker Road Ice Rink	Fort Washington	Ice rink
Walker Mill Regional Park	District Heights	2 softball fields, 1 grass/1 turf field
Watkins Regional Park & Tennis Bubble	Upper Marlboro	9 indoor/4 outdoor tennis courts, 5 softball fields

**Table 14.** Tournaments Hosted in Prince George’s County

Sport	Event	Facility
Futsal	Bethesda Futsal Cup II	Get Good Field House
Basketball	Maryland Invitational Tournament (Basketball)	New 24 Fitness Center
Basketball	2016 CAA Women’s Basketball Championship	The Show Place Arena
Track & Field	AAU Indoor Track & Field National Championships 2016	Prince George’s Sports & Learning Complex
Basketball	2016 NCAA Women’s Basketball Championships, 1 <sup>st</sup> and 2 <sup>nd</sup> rounds	Xfinity Center
Hockey	Cherry Blossom Showdown	The Gardens Ice House
Basketball	Memorial Day Takeover (Boys)	District Heights
Basketball	Jr. Elite Championships	University of Maryland
Basketball	AAU Potomac Valley District Qualifier	Springdale
Tennis	US Open - Sectional Qualifying (Mid-Atlantic)	Tennis Center at College Park
Baseball	Dynamic Mid-Summer 17u-16 Championships	University of Maryland
Swimming	Black & Red Long Course Invitational	College Park
Baseball	Dynamic Mid-Summer 14u Championships	University of Maryland
Baseball	Dynamic Best of the East Showcase	University of Maryland
Basketball	Next Level Recruiting’s East Coast Summer Slam	District Heights
Baseball	Dynamic Mid-Atlantic End of Summer Championships	University of Maryland
Basketball	Charm City - Under Armour I95 Back to School Challenge	District Heights
Softball	43th Annual IAFF MDA Softball Tournament	Watkins Regional Park
Marathon	Woodrow Wilson Bridge Half Marathon	Multiple locations
Basketball	Flames Thanksgiving Tournament	New 24 Sports Center
Basketball	Flames Holiday Tournament	New 24 Sports Center
Cheer	Maryland Madness Open Championship	Show Place Arena
Basketball	1st Round UMD Women’s Basketball Tournament	Xfinity Center
Gymnastics	15th Annual Fairland Trampoline and Tumbling Classic	Xfinity Center
Baseball	Dynamic Mid-Atlantic End of Summer Championships	University of Maryland
Softball	43rd Annual IAFF MDA Softball Tournament	Watkins Regional Park
Basketball	She Got Game Classic	Wise High School

SOURCE: MARYLAND SPORTS

Both large and small markets across the country have developed new facilities to attract tourism and economic development as families’ spending on their children’s activities has increased. Table 13 shows the annual estimated spending by visitors on youth sports events through 2015 (an annual increase of nearly 5 percent). Table 15 shows the priority investments made by owners of youth sports facilities during the same period.

In addition to attracting visitors, these facilities can accommodate local usage (particularly during the week, as tournaments are generally on weekends). The tournament-based facility market will likely become saturated in the near future, but the most competitive facilities and markets — with the best offerings — can continue to thrive.

**Table 15.** Types of Improvements/Renovations Added to Youth Sports Facilities

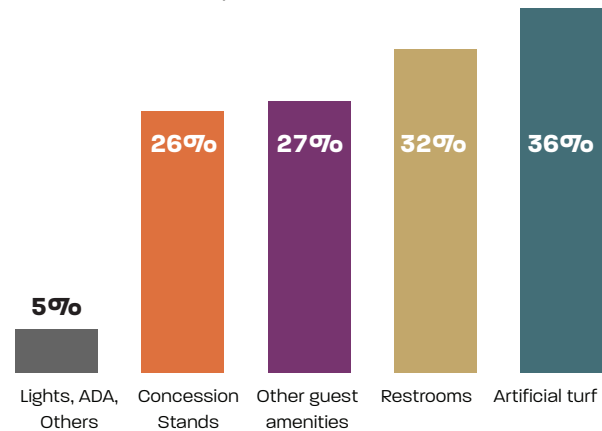




PHOTO BY CARLY BROCKINTON/PRINCE GEORGE'S COUNTY PLANNING DEPARTMENT

The Bowie Gold Senior league softball team uses Allen Pond Park for games.

While spending on youth sports has increased, national data from multiple industry groups indicate that children's sports participation in the United States has decreased, or been mixed, in recent years. According to the National Sporting Goods Association's annual participation study, in 2015 participation generally increased, but in 2016 rates in many sports decreased. Overall, after years of growth in many sports, the more recent trend is inconsistency, although the one sport/activity that has seen sustained growth since the 1990s is "fitness activities." More specific data from the NSGA and the Sports and Fitness Industry Association is:

- Many team sports, such as baseball, basketball, and soccer, have seen declining participation by 3- to 17-year-olds since 2009.
- Despite decreases, 36 million children (66 percent of all boys and 52 percent of all girls) ages of 5–18 play organized sports each year.
- Despite inconsistent participation trends, overall spending on youth sports continues to increase and drive development of new facilities across the country.
- After significant growth in soccer participation in the early 2000s, it has plateaued based on NSGA data and US Youth Soccer registration data.
- Basketball participation is among the highest of any sport in the United States, with more than 25 million participants.

By all accounts, the increased overall spending despite mixed participation rates is explained by the increasing number of facilities and events available to

those who are participating, and their increased focus on the sport(s). As a result, the participating athletes and their families are spending more to support the activities.

Facilities designed to attract non-local users generally require nearby amenities such as hotels and restaurants, and benefit from including sports- and family-focused entertainment such as arcades, movie theaters, virtual sports experiences, sports-viewing facilities, climbing walls, and other adventure sports opportunities. In addition, sports training, wellness, and fitness facilities have also been incorporated into some destinations.

Some venues that are particularly known for the quality of their facilities and level of competition can rely less on supporting amenities.

## The Local Market

### PRINCE GEORGE'S COUNTY

According to Maryland Sports, the statewide sports commission, there are 62 sports facilities in Prince George's County. However, many of these facilities are not open to the public or relevant to this analysis; the list includes country clubs, golf courses, state parks, and university facilities. Table 12 summarizes the most relevant indoor and outdoor facilities that can be used by the public for local and tournament usage, as well as their location and offerings.

The list does not include the planned Liberty Sports Park in Bowie, which was recently announced and would have at least 10 lighted fields near the planned

South Lake mixed-use development with 700,000 square feet of commercial space and hotels. The City of Bowie is also planning a new, two-sheet ice facility.

According to Maryland Sports, the County hosted the tournaments listed in Table 14 in 2016 and 2017. Nearly half of the tournaments (12 of 27) were basketball, five were baseball, and two were softball events.

### MARYLAND, BEYOND PRINCE GEORGE'S COUNTY

Beyond Prince George's County, many other facilities host indoor and outdoor youth/amateur sports. However, from preliminary analysis, it appears that most are oriented toward local usage. The facilities include:

- Maryland Soccerplex and Discovery Sports Center (Boyd's) — one of the largest sports complexes in the country, with indoor courts/fields and outdoor fields. It hosts local and tournament usage.
- Hagerstown Ice & Sports Complex — one ice rink, an arcade, snack bar, and event rooms.
- Carroll Indoor Sports Center (Westminster) — 66,000-square-foot indoor facility with three soccer/lacrosse fields and one basketball/volleyball court. Primarily hosts local uses such as leagues and clinics.
- Frederick Indoor Sports Center — 65,000-square-foot indoor sports and training venue with two 30 yard x 60 yard fields and The Sanctuary Performance Studio, which has two 30 x 60 turf fields.
- The Arena Indoor Sports Complex (Mount Airy) — indoor fields for local usage.
- Goals Baltimore Inc. (Catonsville) — two turf fields, one sport court.
- Meadowbrook Athletic Complex (Ellicott City) — 35,000 square feet of gymnasium space.
- Soccer Dome (Jessup) and Soccer Dome II (Harmans) — indoor turf fields for local leagues.
- Volleyball House and Soccer Arena (Elkridge) — six volleyball courts and a soccer field for local leagues and tournaments.

There are also a number of major facilities in the region that can host outdoor tournaments, such as the Kirkwood Soccer Complex in Germantown, Cedar Lane Regional Park in Bel Air, Carsins Run in Aberdeen, the DE Turf Sports Complex in Frederica, Delaware, and The Ripken Experience in Aberdeen.

**Table 16.** Publicly Accessible Indoor & Outdoor Facilities in Northern Virginia

Facility	Location
Andrew Leitch Park	Dale City
Ben Lomond Regional Park	Manassas
Brambleton Regional Park	Ashburn
Central Park Aquatic Center	Manassas
City of Manassas Park Community Center	Manassas
Claude Moore Park and Recreation Center	Sterling
Cloverdale Park	Dale City
Dulles Sportsplex	Sterling
E.G. Smith Baseball Complex	Manassas
Edgar Tillett Memorial Park	Ashburn
Evergreen Sportsplex	Leesburg
Firemans Field	Purcellville
Franklin Park	Purcellville
Freedom Aquatic & Fitness Center	Manassas
George Hellwig Memorial Park	Manassas
George Mason University Aquatics & Fitness Center	Fairfax
Good Times Park at Festival Lakes	Leesburg
Grizzly Sports Complex	Nokesville
Haymarket Iceplex	Haymarket
Howison Homestead Soccer Complex	Woodbridge
Ida Lee Park	Leesburg
James S. Long Regional Park	Haymarket
Loriella Park	Fredericksburg
Loudoun Soccer Park	Leesburg
Mayhew Sports Complex	Manassas
Mickie Gordon Memorial Park	Middleburg
Morven Park Athletic Field Complex	Leesburg
Parks at Embrey Mills	Stafford
Phillip A. Bolen Memorial Park	Leesburg
Potomack Lakes Sportsplex	Sterling
Publix Virginia Soccer Training Center	Fredericksburg
PWCS Aquatic Center	Manassas
Robinson Park	Leesburg
The Ashburn Ice House	Ashburn
The Prince William Ice Center	Woodbridge
Trailside Park	Ashburn
Valley View Park	Nokesville
Veterans Memorial Regional Park	Woodbridge
Warrenton Aquatic & Recreation Facility	Warrenton
Woodgrove Park	Round Hill

Also, the Chesapeake Bayhawks of Major League Lacrosse recently announced plans for a \$40 million, 10,000-seat stadium and amphitheater in Anne Arundel County's Crownsville. The complex would also include 20 multipurpose sports fields and restaurants.

## NORTHERN VIRGINIA

According to Sports Virginia, the statewide sports arm of the Virginia Tourism Corporation, there are approximately 40 public sports facilities in its Northern Virginia region. Many of these facilities are not necessarily tournament-quality but are included in its inventory. Table 16 summarizes indoor and outdoor facilities that can be used by the public for local and tournament usage, as well as their location and offerings.

The Sports Virginia list does not include private facilities such as:

- The Fairfax Sportsplex, which has three indoor turf soccer fields and two indoor sport courts for volleyball and soccer and is focused on league play.
- The St. James, a 450,000-square-foot sports and wellness complex planned to open in September in Springfield. The St. James will include a 110,000-square-foot multipurpose indoor fieldhouse with a turf field, an aquatics center, two NHL-sized ice rinks, a basketball and volleyball center (four basketball/nine volleyball courts), a golf and squash center, an indoor baseball and softball center (six hitting/pitching tunnels), and a gymnastics training center. The complex will also include climbing and bouldering walls, a health club, spa, sports medicine center, indoor water park, obstacle courses, zip lines, restaurant, and store.
- NOVA Field House in Chantilly, which has two indoor turf fields and a basketball court.
- The Evergreen Sportsplex in Leesburg, which has four outdoor turf fields and an adventure course.
- The United Sportsplex in Manassas, which has three basketball courts, two indoor turf fields, a performance training facility, and batting cages and pitching tunnels. This facility is used for tournaments, as well as leagues, camps and clinics, and other events.
- The ION International Training Center in Leesburg, a two-rink hockey facility with a separate multipurpose space for other events. The facility is expected to open this summer and potentially add two more rinks in three years.

## SAMPLE OF NORTHERN VIRGINIA EVENTS

- Amateur Softball Association Eastern Nationals
  - Annandale Premier Cup
  - Babe Ruth World Series
  - Diva's Half Marathon
  - Great Rappahannock Whitewater Canoe Race
  - International Senior Softball Association World Championships
  - Marine Corps Historic Half, Historic 10K, Run Amuck, 17.75K, and Semper Fred 5K
  - National SeaPerch Challenge
  - NCAA Division III Men's and Women's Tennis Championships
  - PGA Golf Tournaments
  - PONY National Girls Softball
  - Prince William Soccer Icebreaker Tournament
  - U.S. Fencing Virginia Kickoff DIV 1A/2 ROC
  - US Figure Skating South Atlantic Regional
  - US Junior Short Track Speedskating Championships
  - Virginia Wine Country Half Marathon
  - Warrior Games
  - Washington Area Girls Soccer (WAGS) Tournament
- SOURCE: SPORTS VIRGINIA

## Stakeholder Feedback

As part of the market analysis, the consultant team spoke to local and industry professionals regarding the current youth sports event and facility market in the area, and the potential for new facilities. The local and national organizations interviewed include:

- Prince George's County Sports & Learning Complex
- City of Bowie, Community Services Department
- Prince George's County CVB
- Maryland Sports
- Zero Gravity Basketball
- United States Tennis Association (Mid-Atlantic Section)
- Prince George's County Department of Parks and Recreation
- AAU Indoor Track & Field National Championships



PHOTO BY AECOM

Spooky Nook is the largest indoor sports complex in the country and included a full-sized baseball infield.

Initial feedback from stakeholders in the sports and recreation industry has provided the following:

- There are no destination indoor sports complexes focused on court sports tournaments in the market despite demand and great market characteristics.
- Many basketball and volleyball tournaments are held locally despite the lack of facility offerings, because of the strength of the market.
- The demand for basketball, ice sports, field sports, tennis, baseball, and softball has exceeded the capacity of existing facilities.
- Negative factors regarding the market and its ability to support additional facilities and events include the lack of quality hotels, restaurants, and other amenities near the Morgan Boulevard corridor and NFL gameday traffic concerns.

## Case-Study Facilities

The consultant team identified a set of complexes focused on youth/amateur sports in other markets (with both indoor and outdoor offerings) similar to what could be developed in Prince George's County.

### **SPOOKY NOOK SPORTS, MANHEIM, PENNSYLVANIA**

Opened in 2013 in an abandoned distribution center and now billed as the largest indoor sports complex in North America, Spooky Nook has 700,000+ square

feet of indoor space, 50+ acres of outdoor facilities, and 2,000 onsite parking spaces. Viability as a private business is aided by inexpensive land and the contribution of public money.

Facilities include 10 basketball courts, four field hockey courts, 10 volleyball courts, six soccer fields, a 60-yard indoor track, and full-sized baseball infield. It also includes a 60,000-square-foot fitness center, a 50,000-square-foot sports performance center, 130,000+ square feet of meeting and event space, a food court and arcade, batting cages, a climbing wall, and other amenities. In addition, it offers the Warehouse Hotel (135 rooms) and the Forklift & Palate restaurant onsite, both of which opened in 2015.

Spooky Nook hosts tournaments, leagues, corporate events, conventions and trade shows, birthday parties, camps and clinics, community events, and other programming.

According to Spooky Nook and other reports, the complex's usage has the following characteristics:

- It accommodates 20 different sports
- 950,000 visitors per year
- It is the home of the US women's Olympic field hockey team
- User demographics include: 53 percent male, 47 percent female; an average household income of \$75,000 – \$99,000; and 63 percent of user households have one or two children.





PHOTO COURTESY OF GOOGLE IMAGERY

Indiana's Grand Park opened in 2014 and cost \$68 million to build.

### **GRAND PARK, WESTFIELD, INDIANA**

The 400-acre Grand Park, outside of Indianapolis, is a major indoor/outdoor sports complex. Outdoor facilities include 26 baseball and softball diamonds and 31 multipurpose fields. Indoor facilities include a 370,000-square-foot indoor events center with three turf fields, retail and meeting space, and multipurpose space for conventions, trade shows, entertainment, and the 88,000-square-foot fieldhouse.

The complex opened in 2014, and the indoor uses opened in 2016. Total construction costs were approximately \$68 million.

Its "Grand Plan" includes a surrounding village that will include dining, retail, and entertainment, hotels, offices, light manufacturing, residential, and other uses as part of the 2,300-acre area.

Uses include tournaments, local leagues, and others. The complex has a number of tenants, including the City of Westfield's sports and recreation programming, a private baseball program, a soccer program (the official youth soccer club of the MLS Chicago Fire), a volleyball program, a running series, the CrossFit Grand Games, and community events.

Grand Park recently became the training camp site of the NFL's Indianapolis Colts.

According to Grand Park and other reports, the complex's usage has the following characteristics:

- Total visitors increased from approximately 900,000 in 2014 to nearly 1.9 million in 2016 (as the facility expanded).
- The percent of non-local (Hamilton County) visitors for soccer and field sports ranged from 59-76 percent in its first three full years; baseball and softball ranged from 54-78 percent; and 48 percent of event center users were non-local.
- Total direct spending for operations by the complex was approximately \$1.9 million to \$2.4 million over those three years.

### **BOO WILLIAMS SPORTSPLEX – HAMPTON, VIRGINIA**

Billed as the largest sports complex between Greensboro and Washington D.C., the \$13.5 million, 135,000-square-foot Sportsplex opened in 2008, led by former professional basketball player Boo Williams.

The Sportsplex accommodates basketball, volleyball, track and field, field hockey, soccer, lacrosse, gymnastics, cheerleading, wrestling, weightlifting, boxing and martial arts, and others. The facility has eight basketball courts, a six-lane indoor track, eight volleyball courts, four hockey courts, fitness and training facilities, and meeting rooms, and hosts many major national tournaments.

The Sportsplex is the home of the Boo Williams Summer League, an AAU-affiliated basketball league that started in 1982. It also hosts local high schools' practices.



PHOTO COURTESY OF GOOGLE IMAGERY

The Boo Williams Sportsplex is a \$13.5 million, 135,000-square-foot Sportsplex that opened in 2008.

According to the Sportsplex and other reports, the complex's operations have the following characteristics:

- Out-of-town athletes and families who come to the Sportsplex book more than 25,000 nights each year in local hotels, often for weeklong stays. Forty percent of room nights are captured outside of Hampton.
- Financially, the facility breaks even.
- The City of Hampton recently voted to purchase the Sportsplex for \$9.25 million from Williams and his partners. Williams would continue to operate the facility for the city.

### Sports Market Summary Findings

- Based on market research, the amount of money spent within the youth sports market is growing significantly, despite lack of participation growth. Many sources have indicated plateaued or decreasing participation for major team sports such as soccer, baseball, football, and basketball, yet the spending per athlete is increasing.
- Prince George's County does not appear to have many facilities of the scale and quality that can host large tournaments. Facilities are generally smaller with a limited number of fields or courts.

- The Morgan Boulevard area is an attractive location within the County for a sports complex, because of its Beltway access and proximity to Washington, DC, Virginia, and other parts of Maryland. Additionally, the proximity to the new medical center may create new opportunities for mutually beneficial sports medicine collaborations.
- Given the strength of the local/regional market and the lack of adequate facilities for destination indoor court sports tournaments, it is likely that other entities will develop facilities to meet market demand in the near future. As our research has shown, both the public and private sectors are currently planning new facilities in the Maryland/Northern Virginia area.
- Most successful youth/amateur sports complexes that cater toward non-local residents also offer (onsite or adjacent) amenities such as hotels, restaurants, and other attractions, in addition to high-quality sports facilities and competition. For facilities focused on local usage, these amenities are generally not important.
- Based on the size of the local/regional market and its strong demographics, it appears there are opportunities for new sports facility development.

Existing and potential land uses in the Morgan Boulevard corridor, such as FedExField, the Sports & Learning Center, and commercial development, could complement new sports-related development and private investment. This development would lead to job creation onsite (management, marketing, finance, maintenance, food and beverage, and others) and through any complementary development (such as hotel, restaurant, and entertainment facility staff).

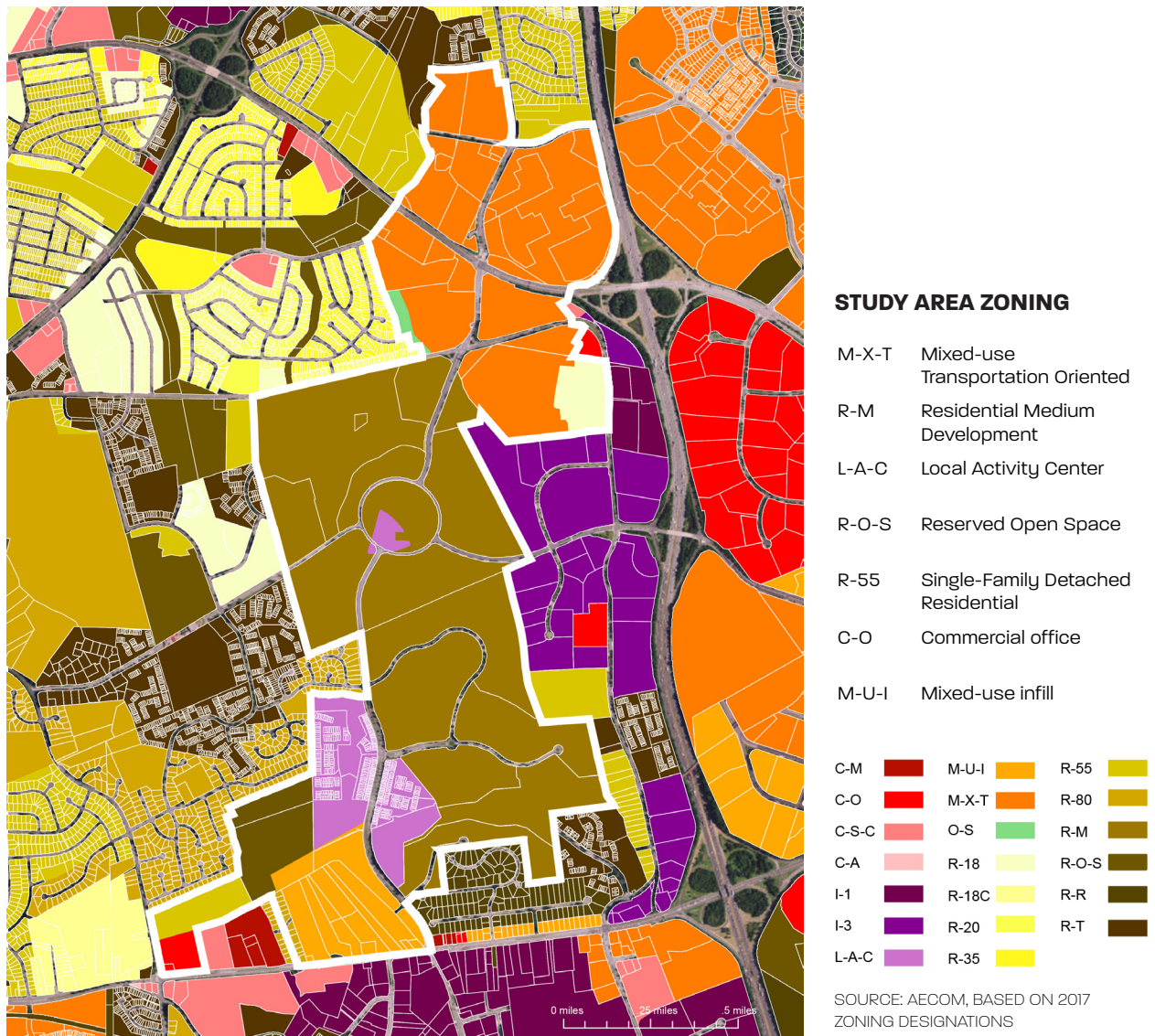
- Specific feedback provided by stakeholders includes the following:
  - › One tournament promoter said that he hosts events locally “because the market is so good” and “would do more with better facilities,” and that “there’s an unbelievable need” for basketball facilities.
  - › The Morgan Boulevard corridor location is “great” and is centrally located in the County (although NFL traffic is a concern for Sunday events in the fall).
  - › “It would be great to have more upscale hotels and restaurants in the immediate area,” that could potentially connect to a sports complex site, such as at or near the Landover Mall site.
  - › “Local facilities don’t have the number of courts/fields and parking necessary to host tournaments.”
- The consultant team believes indoor sports facilities are a better market fit than outdoor facilities for this study area. Recent proposed outdoor facilities in Bowie, as well as existing outdoor facilities in Montgomery County will capture the market for outdoor tournaments.
- Indoor sports courts ( for basketball and volleyball) have the greatest market potential. A facility that provides 12 to 20 multipurpose courts with ancillary amenities is the minimum viable size for major tournament destinations.
- Other nearby or onsite facilities that would be needed/desired to support a new sports complex include:
  - › Hotels (generally mid-range priced)
  - › Family-oriented restaurants
  - › Other sports, recreation, or cultural attractions
  - › Sports medicine/training facilities
- Challenges to address regarding the successful operation of a new sports complex in Prince George’s County include:
  - › The ability of a complex to be fully self-supporting financially, particularly as a private development.
  - › Local land prices could be prohibitive for a private developer; some form of public subsidy may be necessary.
  - › The current lack of supporting amenities in the County.
- Potential ownership/operational structures for a new complex could include:
  - › A fully private development (the private sector is responsible for all land, construction, and operating costs) — this is unlikely, given the land needs and the associated land costs in the area.
  - › A fully public development — the public sector would fund all development and operational costs. This would depend on the availability of public funding, political will, and the willingness to operate a facility and take on the operating risk.
  - › A public-private partnership — this could take many forms, but generally both the public and private sectors would contribute toward development and operations. In the case of a sports complex, it could include the County providing publicly-owned land and/or other incentives, and a private operator could build and operate a facility.
- Across the country, a number of markets have added entertainment and other event facilities adjacent to NFL stadiums to enhance the gameday experience and year-round use of the stadium area. These include a convention center with a concert venue (Seattle), an amphitheater (Jacksonville), a public event space (New Orleans), an indoor/outdoor concert venue (Pittsburgh), and mixed-use developments (New England, Green Bay, Pittsburgh, and Inglewood). Other, less formal development includes parkland surrounding Chicago’s Soldier Field that is used for festivals and other events, and a football field next to Buffalo’s New Era Field that is used for youth sports.

# Regulatory Framework

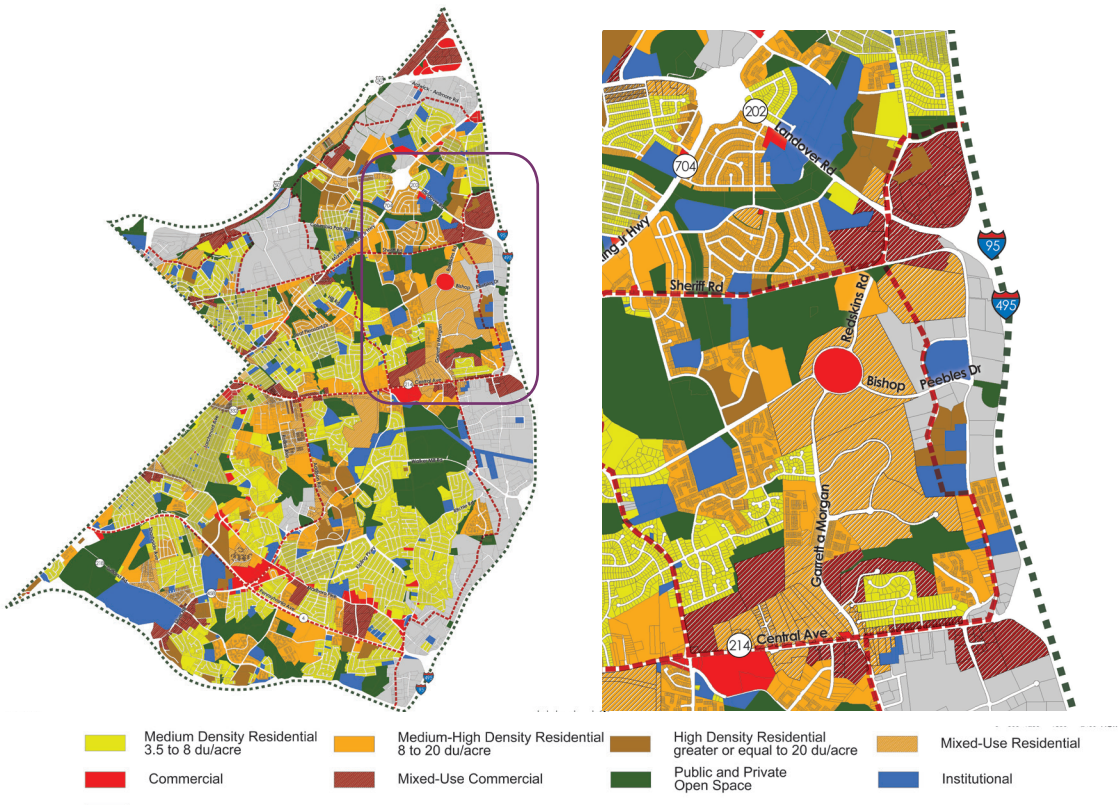
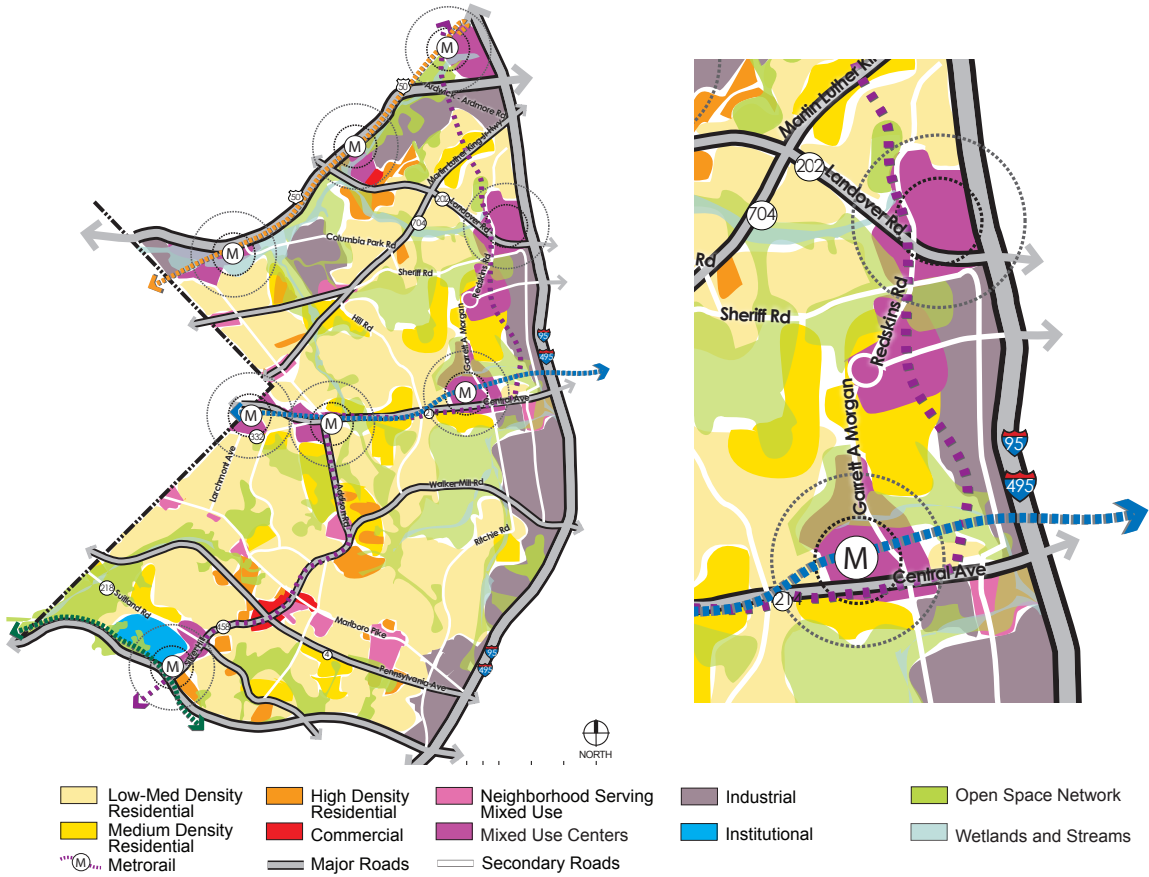
The market analysis suggests the study area is well positioned to become a regional, potentially national, destination for amateur indoor athletics and sports-focused entertainment while simultaneously becoming Prince George's County's premier destination for life-long community wellness. These two ideas complement each other and fit within the approved land use and zoning framework. Figure 11-Figure 15 depict the zoning and land use vision described in the Subregion 4 Master Plan. The

approved policy framework suggests that the study area be developed as a series of walkable, amenity-rich, mixed-use centers organized around the former Landover Mall area (also called Landover Gateway), the FedExField area, and the area surrounding the Morgan Boulevard Metro Station. The two signature destinations identified in the market analysis can be integrated into these proposed mixed-use centers and attract additional complementary development.

**Figure 11.** Diagram depicting study area zoning designations



**Figure 12.** Land use diagrams excerpt from the approved 2010 Subregion 4 Master Plan

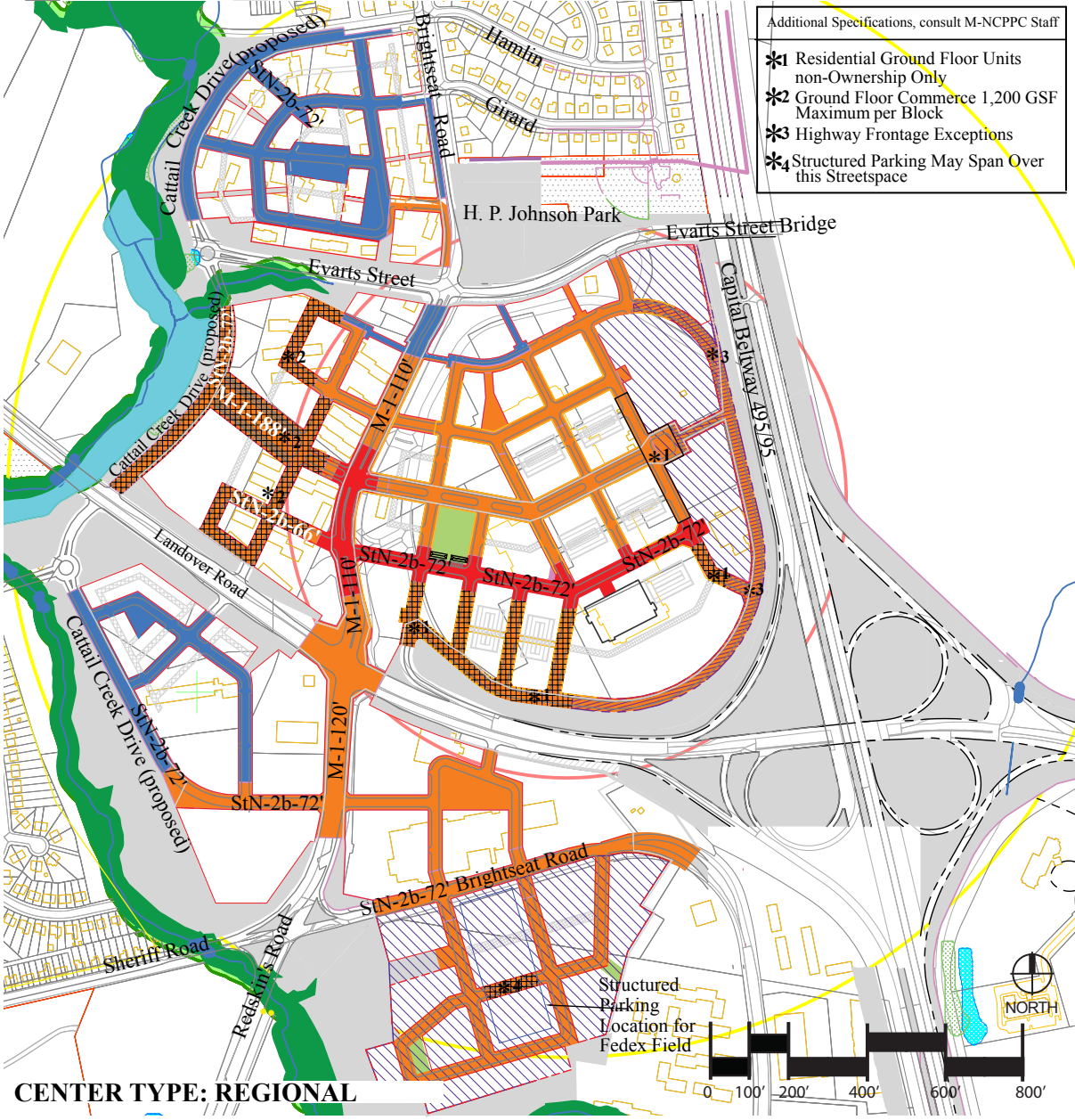


**Figure 13.** Conceptual regulating plan diagram for the former Landover Mall area excerpt from the 2010 Approved Subregion 4 Master Plan

## Landover Gateway Center - Conceptual Regulating Plan

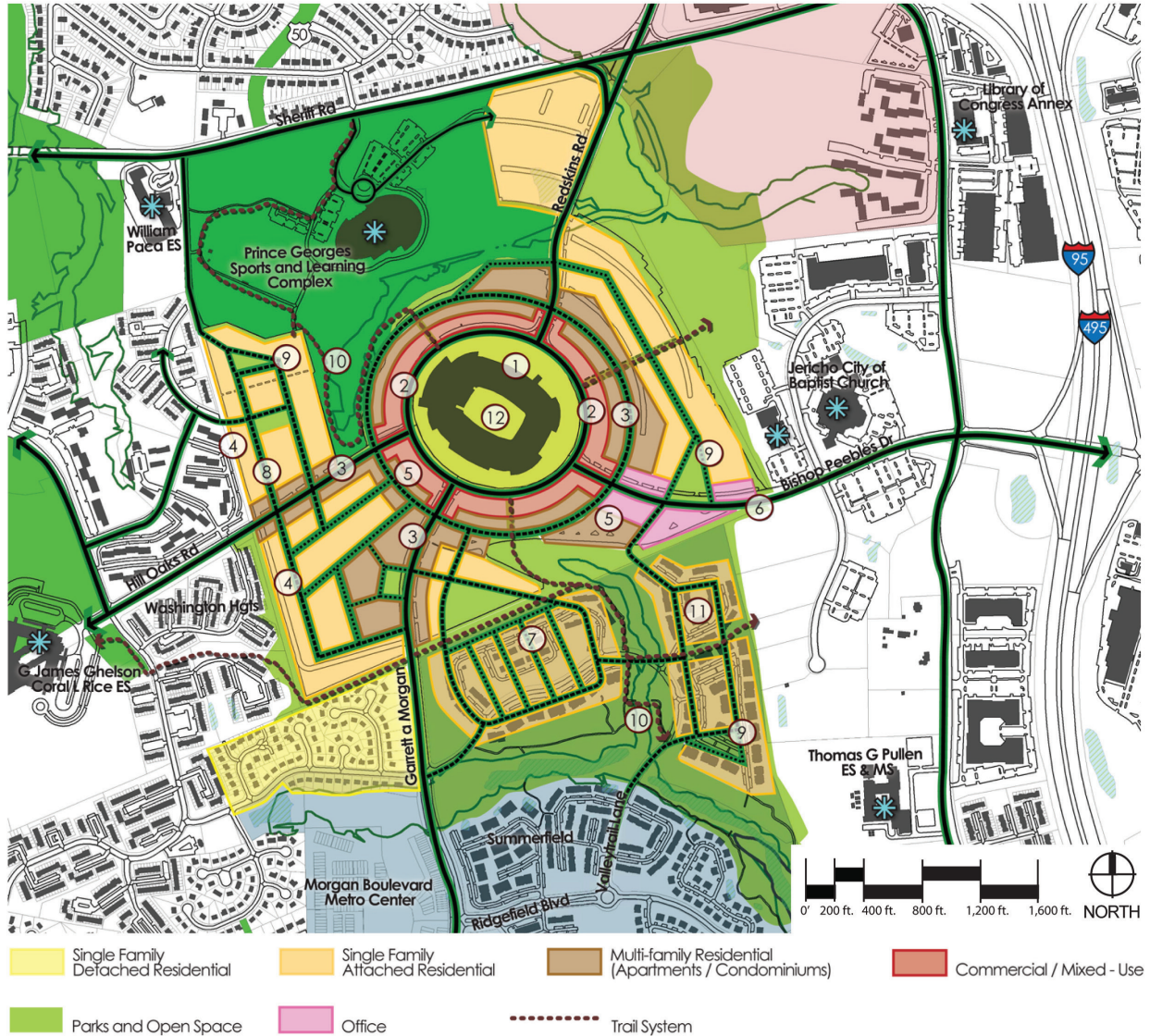
### Legend

- |                                    |  |                                  |                   |                         |
|------------------------------------|--|----------------------------------|-------------------|-------------------------|
| Storefront Frontage                | Existing Property Line                     | Build-To Line (BTL)              | Wetlands          | Street Type Designation |
| General Frontage                   | Civic Space                                | Lot Building Limit (LBL)         | Regulation Area   | Consult M-NCPPC         |
| Townhouse/Small Apartment Frontage | Alley/Access Easement (Exact Location TBD) | Parking Setback Line             | Street Centerline | M-NCPPC Property        |
| Detached Frontage                  | Civic Buildings and Monuments              | Urban Center Boundary Line       | .50 Mile Radius   | Employment Reserve      |
| Workshop Frontage                  | Open Space/Parks                           | Urban Neighborhood Boundary Line | .25 Mile Radius   |                         |



**CENTER TYPE: REGIONAL**

**Figure 14.** Potential street grid and land-use designations for the land surrounding FedEx Field excerpted from the Subregion 4 Master Plan



### Key Sites – Former Landover Mall Area (Landover Gateway)

The Subregion 4 Master Plan describes Landover Gateway, the area surrounding the former Landover Mall site in the following way:

*“The Landover Gateway Civic Center is envisioned as a new downtown for Prince George’s County. Center Street will become the focal thoroughfare and be bordered by four different types of building forms that engage the street. Buildings along Center Street that are adjacent to the Capital Beltway are likely to increase in height and contain primarily commercial uses, while buildings closer to the heart of the neighborhood will*

*likely decrease in height and incorporate mixed-use development.” (Part II, pg. 167)*

The landowners of the former mall site intend to develop it as suggested in the zoning and Subregion plan. Because they intend to hold the property until the market can support the proposed development, the mall site is not considered a near-term development opportunity for the land uses targeted in the market analysis.

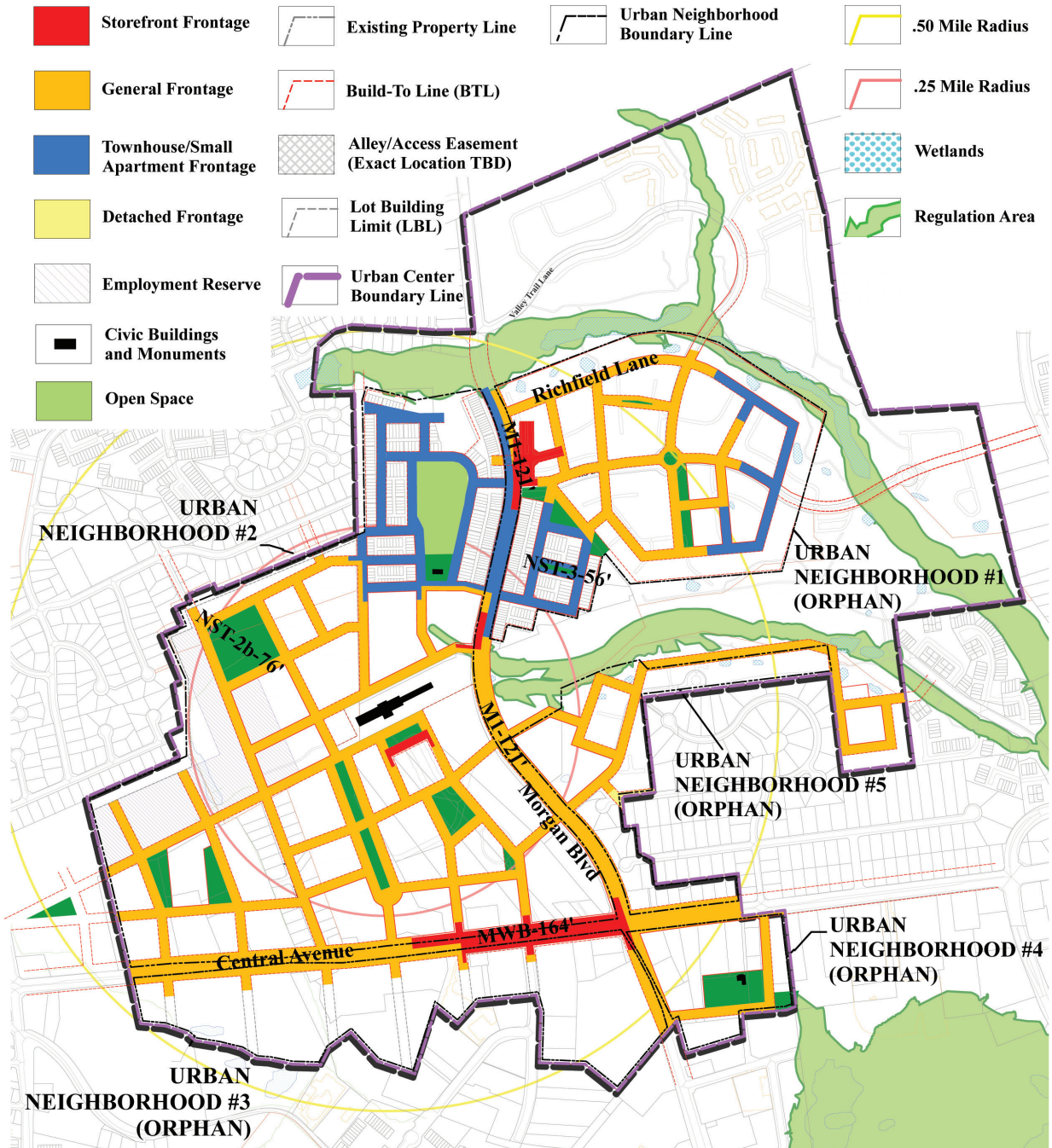
### Key Sites – FedExField Area

The Subregion 4 Master Plan describes the proposed enhancements to the area surrounding the stadium in the following way:

**Figure 15.** Conceptual regulating plan diagram for the Morgan Boulevard Metro area excerpted from the Subregion 4 Master Plan

## Morgan Boulevard Metro Center - Conceptual Regulating Plan

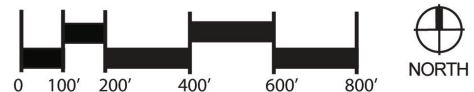
### Legend



### NOTES:

All streets are NST-2b-66' unless noted otherwise on the plan

**CENTER TYPE: REGIONAL**





*“The FedExField area redevelopment scenario explores the potential of developing the stadium surface parking sites into a new urban, mixed-use neighborhood, anchored around sporting and entertainment events held at the stadium. It is envisioned that the introduction of new streets, interspersed within the existing infrastructure, will create a finely grained street network. Greater street connectivity, small block sizes, a mix of uses, and a variety of housing types will produce a walkable, pedestrian-friendly environment.” (Part IV, pg. 303)*

It is a priority for Prince George’s County to keep the Washington Redskins in the County. The two signature land uses identified during the market analysis could be components of the mixed-use community envisioned by the Subregion plan surrounding the stadium. Of course, gameday parking would need to be provided through parking structures, as it has with other stadium-adjacent developments at other NFL sites.

The Redskins organization leases the current parking area land from the County. The term of that lease runs until 2027. The parties would need to agree to new lease terms to move forward with development adjacent to the stadium.

## **Key Sites – Morgan Boulevard Metro Area**

The Morgan Boulevard Metro area is imagined as a mixed-use, transit-oriented destination. The Subregion 4 Master Plan describes the key urban

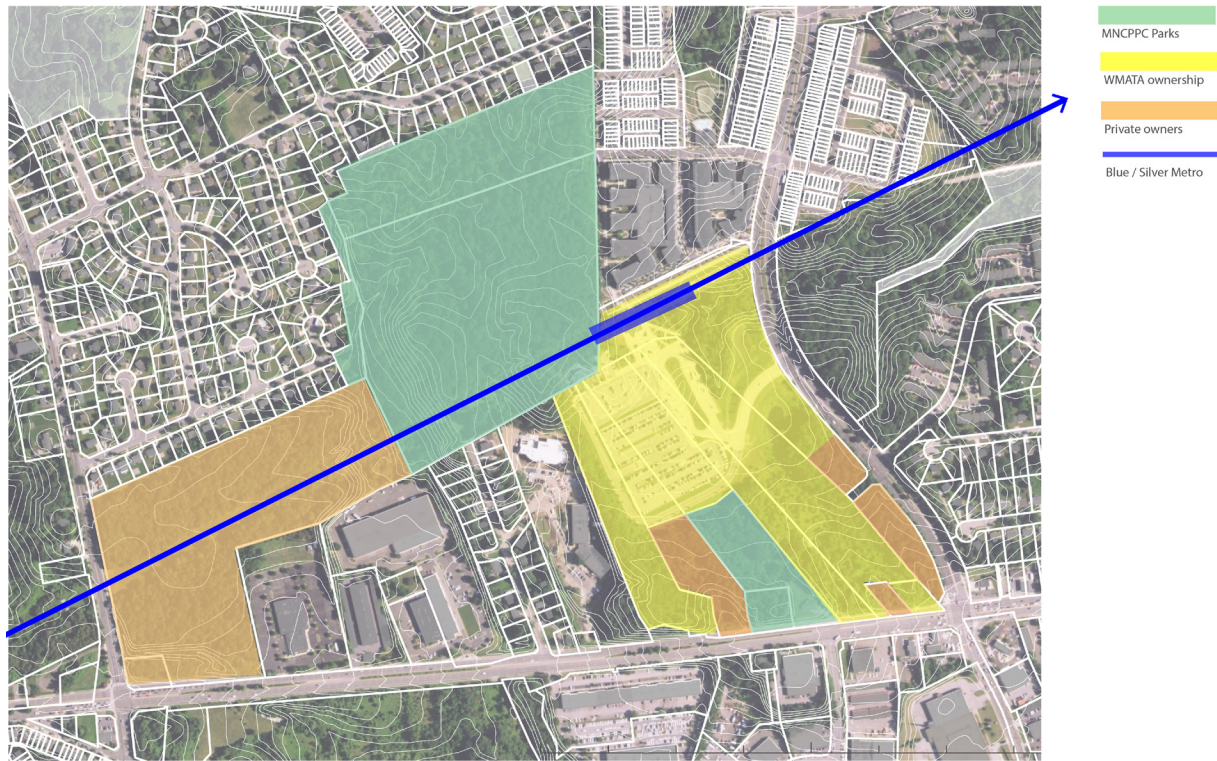
design principles and connectivity priorities for the area.

*“Overall, the urban design concept for Morgan Boulevard expands the community around the Metro station into a diverse, mixed-use center. The design concept maintains connectivity throughout the growth center, with an emphasis on north to south connections. In order for this to occur, new vehicular access will be provided through the property currently owned by the County to the area north of the Metro right-of-way, including the extension of Jonquil Avenue across the Metro right-of-way. Additionally, construction of a street grid within the area west of Morgan Boulevard, south of the Metro, and north of Central Avenue will provide for a more effective traffic flow and enhance the pedestrian experience.” (Part II, pg. 152)*

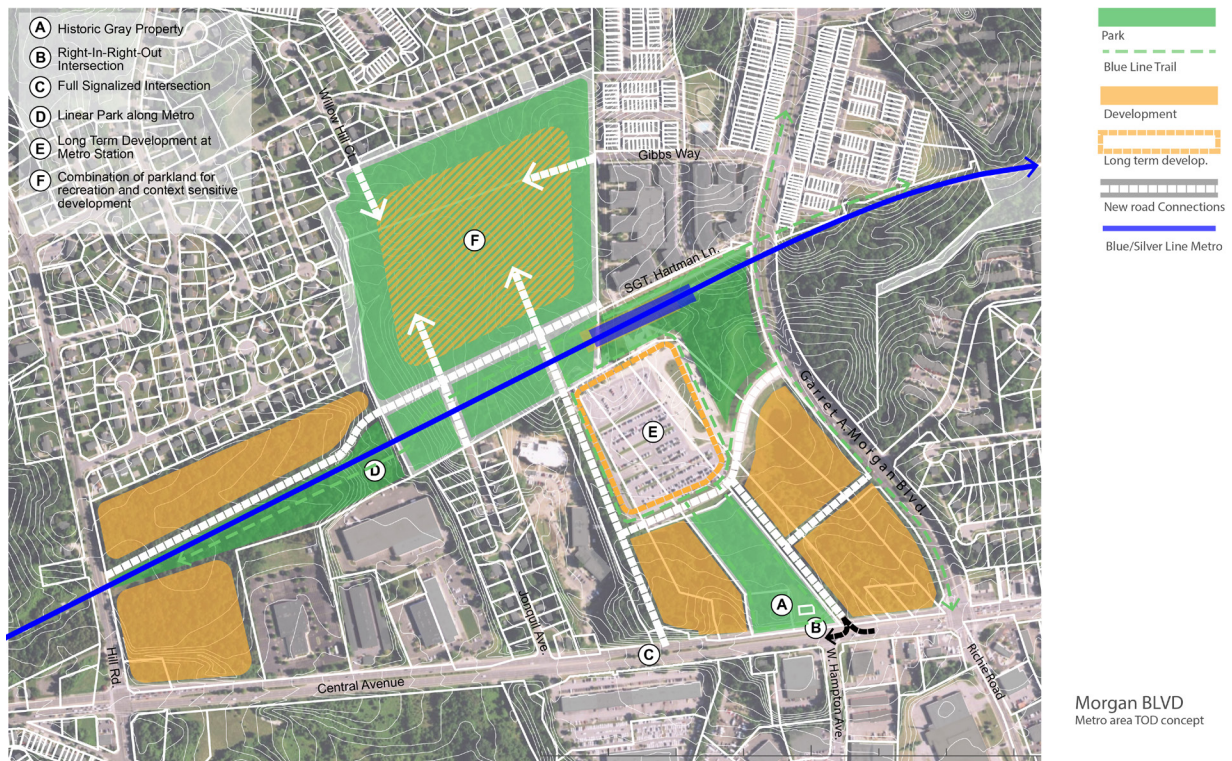
Creating a new street grid that improves multi-modal accessibility and offers a choice of routes for area neighborhoods is critical to realizing the goals of the Subregion 4 Master Plan. However, the fragmented land ownership south of the station creates a challenge for developers that wish to build the planned connections.

Map 4 depicts a revised street grid layout that attempts to clarify the primary road network and intersections with Central Avenue. The proposed street grid is sensitive to the existing property lines to provide simple connections and preserve coherent open space and development pads. Access points along Central Avenue align with State of Maryland signal spacing requirements and minimize impacts to the Gray family park property.

**Map 3.** Diagram depicting generalized land ownership at the Morgan Boulevard Station area. (2017)



**Map 4.** Proposed primary public road connections, park space, and development areas near the Morgan Boulevard Station area.



# Proposed Active Adult/Wellness Community

The proposed active adult/wellness community would be a mixed-use residential community, designed for the needs of seniors, but not exclusively age-restricted. The community would be large enough to accommodate a variety of lifestyles, price points, graduated-care settings, and housing types with significant integrated retail, recreational, cultural, and healthcare amenities. Examples of these amenities include:

**Retail** – Retail amenities can include modest restaurants and stores that serve the growing neighborhood.

**Recreational** – Recreational amenities can include facilities for indoor and outdoor recreation that may be exclusive to community members. In addition,

publicly accessible parks can be located throughout the community and linked by public shared-use paths and greenways.

**Cultural** – Cultural amenities can include community meeting spaces and a small events center that hosts public performances, lectures, and festivals. It is possible that this center could partner with the nearby Thomas G. Pullen School for the performing arts to showcase their work and act as their home stage.

**Healthcare** – Integrated healthcare facilities could include pharmacies, urgent care, outpatient surgical centers, allied health offices, and doctors' offices to take advantage of proximity to the Regional Medical Center. While large-scale medical office parks are

## Active-adult community

Potential locations (pro + con)

### Pros

- Synergy with Landover Crossing retail + new residential in the area

### Cons

- Constrained parcel size without redevelopment

### Pros

- Adequate parcels under public control
- Proximity to hospital center

### Cons

- Lease expires 2027

### Pros

- Transit-oriented location
- Connectivity to open space + trails

### Cons

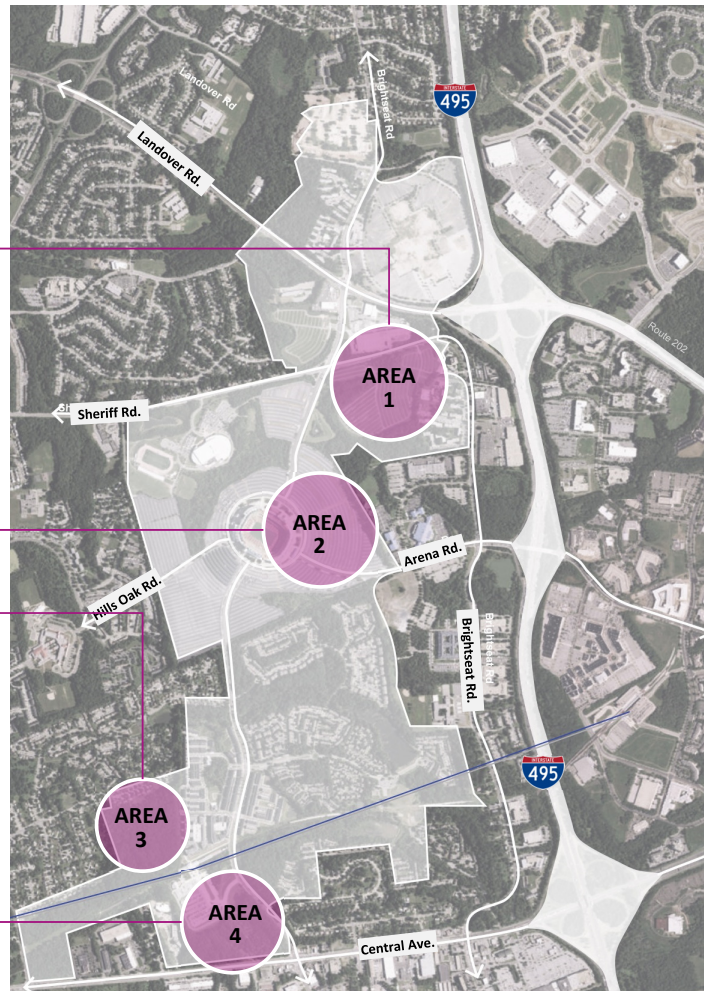
- Needs new street connections

### Pros

- Transit-oriented location

### Cons

- Fragmented land ownership
- Needs new street connections





**Figure 16.** Artist's depiction of a potential open space within the active adult/wellness community surrounded by cultural destinations, retail, and healthcare amenities.

proposed east of I-95 closer to the new hospital, walkable healthcare facilities within the community are still desirable.

The active adult/wellness community can be located in one of many places within the study area or across multiple parcels. While there are many ways the community could be planned within the study area, each potential location has its own characteristics, opportunities, and challenges to consider. The following diagram highlights the opportunity sites and their respective characteristics.

Each candidate site is zoned differently, and each zone has its own use allowances and prohibitions. The proposed active adult community includes many elements that individually may or may not be prohibited in each zone. However, through the special exception, comprehensive design zone approval or rezoning processes, the appropriate mix of graduated care, residential, retail, culture, and healthcare amenities can be developed in each location.



**Figure 17.** Artist's collage of the potential activities within an amateur sports and entertainment venue.

## Proposed Amateur Sports and Entertainment Destination

The proposed indoor amateur sports and entertainment destination will differentiate itself within the market through its scale and the level of integrated complementary amenities. As an example, the current Prince George's Sports & Learning Complex has a footprint of less than 200,000 square feet. To host the minimum target tournament size, the proposed venue would need to be roughly 320,000 square feet; to include the optimal number of courts and complementary amenities, the facility's footprint could grow to more than 600,000 square feet. In addition to the athletic facilities and spectator areas, examples of the targeted amenities and sports-related experiences include:

- **Hotel** – Onsite lodging improves the experience for visiting families and improves the attraction value of the venue.
- **Restaurants** – A variety of dining experiences from food court style to sit-down, sports-themed restaurants and bars improve the visitor experience and become a destination for the local community.
- **Gaming Center** – E-sports venues can offer a new experience for visitors and become a destination for virtual sports tournaments.
- **Climbing Center** – Indoor climbing experiences can have a membership model or offer day-use opportunities for visitors.

- **Sports Medicine and Training** – Onsite sports medicine, physical therapy, and athletic training services support the tournament experience and can be standalone businesses open to the public.
- **Health clubs** – A signature fitness center can complement the athletic venues and be part of the sports training offerings.

The amateur sports venue can be located in one of several places within the study area. While less ideal, it can also be built across multiple parcels with the hotel, sports medicine, and parking occurring separately from, but proximate to, the main sports and entertainment complex. While there are many ways the destination can be sited within the study area, each potential location has its own characteristics, opportunities and challenges to consider. Figure 18 highlights the opportunity sites and their respective characteristics.

Each candidate site is zoned differently, and each zone has its own use allowances and prohibitions.

The proposed amateur sports venue includes many elements that individually may or may not be prohibited in each zone. However, through the special exception, comprehensive design zone approval, or rezoning processes, the appropriate mix of recreation, dining, lodging, and entertainment activities can be developed in each location.

**Figure 18.** Possible sites for an amateur sports venue

## Amateur sports venue

Potential locations (pro + con)

### Pros

- High visibility
- Beltway access

### Cons

- Parcel size constraints
- Redevelopment needed

### Pros

- Parcel size
- Development ready

### Cons

- Stadium parking impacted

### Pros

- Extension of Sports & Learning concept
- Compatible adjacencies
- Parcel size
- Connectivity options
- Development ready
- Public land control

### Cons

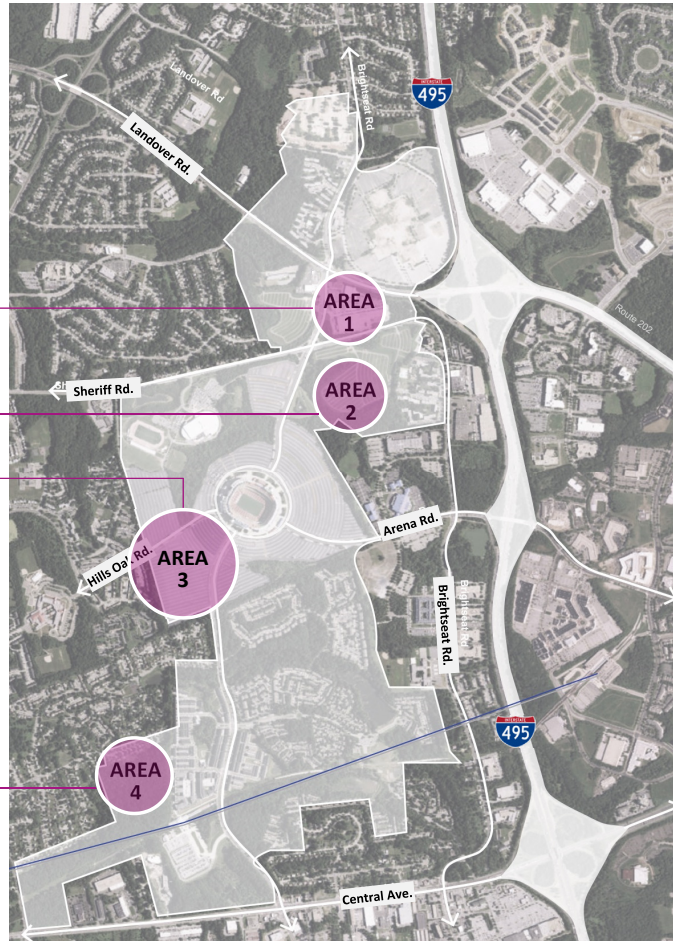
- Stadium lease expires 2027
- Stadium parking impacted

### Pros

- Public land control

### Cons

- Residential adjacencies
- Circuitous connectivity

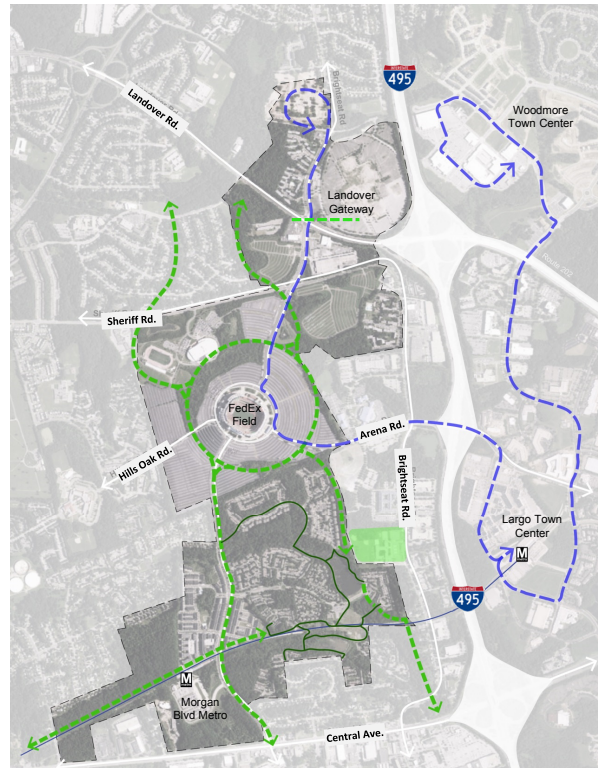


# Overall Connectivity

Improving transit access and multi-modal circulation is critical to attracting the desired high-quality development while minimizing congestion. Roadway crossings and pathways within the study area are not hospitable to pedestrians and cyclists, and Metro access is limited to the southern end of the study area, far from the Landover Gateway and FedExField. To address these challenges, two proposals are made that have their roots in the Subregion 4 Master Plan:

- Shared-use path and trail network** – The proposed path and trail network builds on previous proposals to connect multiple destinations and existing trails in a series of loops that will enable greater connectivity and health benefits. The path and trail network uses stream valley routes and street-adjacent routes to connect destinations and offer a variety of experiences.
- Circulator bus corridor** – A circulator bus loop is proposed to connect Landover Gateway, FedExField, Boulevard at Capital Centre, the new hospital, McCormick Office Park, and Woodmore Town Center with the Largo Metro station. This type of service, running on a 10-minute headway, aligns with the Last Mile Connectivity and transit area recommendations being developed as part of Prince George’s County’s Transit Vision Plan.

**Map 5.** Proposed general alignment of future trail and bus connectivity.



- - - Proposed shared-use paths and trails
- Existing trails
- - - Proposed circulator-type bus corridor



PHOTO BY AECOM

Planners shared the results of the market analysis at the March 1, 2018, public meeting.

## Stakeholder Engagement and Public Feedback

Throughout the process, the planning team engaged key landowning stakeholders and community associations through interviews and individual meetings. In addition, the team held a public meeting to share the results of the market analysis and discuss development implications and proposals. Following the presentation, community meeting participants were not concerned about the suggested land uses or connectivity ideas, but shared the following general sentiments:

- The community is eager to find out what the Redskins plan to do when the lease for their parking area ends in 2027, and would like to create a plan well in advance. Attendees were

curious if the proposed land use ideas would be remain viable in the study area if the Redskins played elsewhere in the County after 2027.

- Attendees voiced consistent concerns about existing pedestrian and bicycle safety issues and the desire for improved walking environments for all ages.
- Attendees hoped new development would help bring dining and grocery options, in keeping with the health and wellness theme of the study area.
- The community also voiced the desire for public facilities, such as schools and fire stations, to be incorporated within the new developments, in keeping with County policies.



# Action Plan

Marketing and capital improvement activities are suggested to accelerate development in the near-term (one-five years). These actions will either help directly attract the targeted development, clarify infrastructure and connectivity issues for the

development community, or coordinate the efforts of adjoining property owners in a way that enables mutually beneficial outcomes. These timeframes need to be coordinated with the responsible parties pending the staff and financial resources.

Action	Responsible Party	Responsibility	Completion Date	Measurable Outcome
Prepare a fiscal impact analysis	PGCEDC	Determine return on investment for County (corporate/commercial taxes, jobs, new regional destination for tourism), benefit to local community	Winter 2020	Prepare a document to empower decision makers to incentivize and attract investment.
Evaluate M-NCPPC plans for select sites in Morgan Boulevard study area and potential partnerships	MNCPPC – Parks	Evaluate opportunities to partner with regional sports venue operators to complement M-NCPPC mission at selected sites.	Fall 2020	Prepare a summary memo describing the plans for park sites and any opportunities to partner with sports venue operators for mutual benefit.
Agree on an implementable concept for extending the street grid at the Morgan Boulevard Metro Station	M-NCPPC Planning, Parks, and Prince George's County, DPW&T, WMATA, MDSHA	Using the proposals in this study as a starting point, coordinate the approximate locations of major public roadway access points and rights-of-way at the Morgan Boulevard Metro Station area with station-area landowners.	Spring 2022	Prepare an updated diagram highlighting the major circulation routes the County would hope to see built in the future. This street-grid concept must be sensitive to property lines and topographic constraints.
Identify available incentives to attract investment	PGCEDC	Evaluate incentive programs and ways to expedite development review and entitlements within the study area.	Fall 2018	Prepare a list of potential funding sources and means by which the County can incentivize the private sector.
Solicit potential investors	PGCEDC	Identify and engage potential investors and inform commercial realtors	Spring 2019	Prepare annual progress report
Engage partners in attracting amateur sports tournaments	PGCEDC	Convene a working group of event promoters and amateur sports leagues to assist in developing and executing the marketing strategy	Spring 2019	Host meetings with potential partner organizations/ individuals to refine attraction strategy and build support
Coordinate with the Washington Redskins on potential near-term opportunities	County Executive and County Council	Coordinate with the Washington Redskins on potential near-term development opportunities for their property along Brightseat Road. This land is independent of the stadium's lease agreement.	Fall 2021	Host a meeting with Redskins representatives to discuss potential development of these properties.
Develop a plan for the Largo-area circulator	Prince George's County DPW&T	Integrate the intent of the proposed Largo-area circulator bus system into the county-wide transit vision plan and develop an operating plan, phasing plan, and funding strategy.	Fall 2018	Review the County's Transit Vision Plan for a description of current operations and financing options for this service.

Action	Responsible Party	Responsibility	Completion Date	Measurable Outcome
Improve pedestrian safety and convenience of the Garrett Morgan Boulevard streetscape	M-NCPPC Planning and Prince George's County DPW&T (pending grant funding)	Identify pedestrian and bicycle safety and convenience improvements to address community concerns at key intersections and provide more convenient, comfortable bicycle and pedestrian facilities between study area destinations and the Morgan Boulevard Metro Station.	Fall 2019	Prepare a plan identifying gaps, recommended improvements, costs, and funding sources.
<b>PGCEDC:</b> Prince George's County Economic Development Corporation	<b>DPW&amp;T:</b> Prince George's County Department of Public Works and Transportation	<b>WMATA:</b> Washington Metropolitan Area Transit Authority	<b>MDSHA:</b> Maryland State Highway Administration	

# Acknowledgements



## SENIOR MANAGEMENT

Andree Green Checkley, *Planning Director*

## PROJECT TEAM CORE MEMBERS

Kipling Reynolds, *Division Chief, Community Planning*

Scott Rowe, *Supervisor, Long-Range Planning*

John C. Wooden, *Planner Coordinator*

David A. Green, *Master Planner, Community Planning Division*

Chidy Umeozulu, *Planner Coordinator*

## PROJECT TEAM RESOURCE MEMBERS

Sonja Ewing, *Park Planning Supervisor, Department of Parks & Recreation*

Helen Asan, *Acting Land Acquisition and Development Review Supervisor, Department of Parks & Recreation*

## TECHNICAL, ADMINISTRATIVE, AND OTHER ASSISTANCE

Carly Brockinton, *Publications Specialist*

Jackie Philson, *Countywide Specialist Planner*

## CONSULTANTS



AECOM, *Urban planning, design, and real-estate market analysis*



Stone Planning, *Sports and entertainment market analysis*



Assedo Consulting, *Public engagement*

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