



# Transit-Oriented Development Framing the Future of Prince George's County

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Prince George's County Economic Forum | June 11, 2010





# Growing Demand for Higher-Density Communities

# 1950s - REDEFINING THE AMERICA DREAM

## SUBURBAN LIFE IN RESPONSE TO CITY LIVING



Source: Photograph of Levittown, Pennsylvania by Margaret Bourke-White, 1957

# THE SO-CALLED DREAM NO LONGER RANG TRUE OR AT LEAST IT DOESN'T ALIGN WITH MODERN LIFE



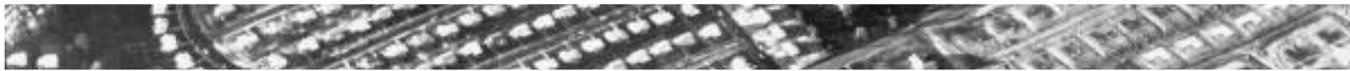
TOO MUCH TRAFFIC, TOO FAR OUT



LOST SOCIAL INTERACTION



SUBURBS AREN'T NECESSARILY SAFER



ARCHITECTURAL SAMENESS, BORING PLACES



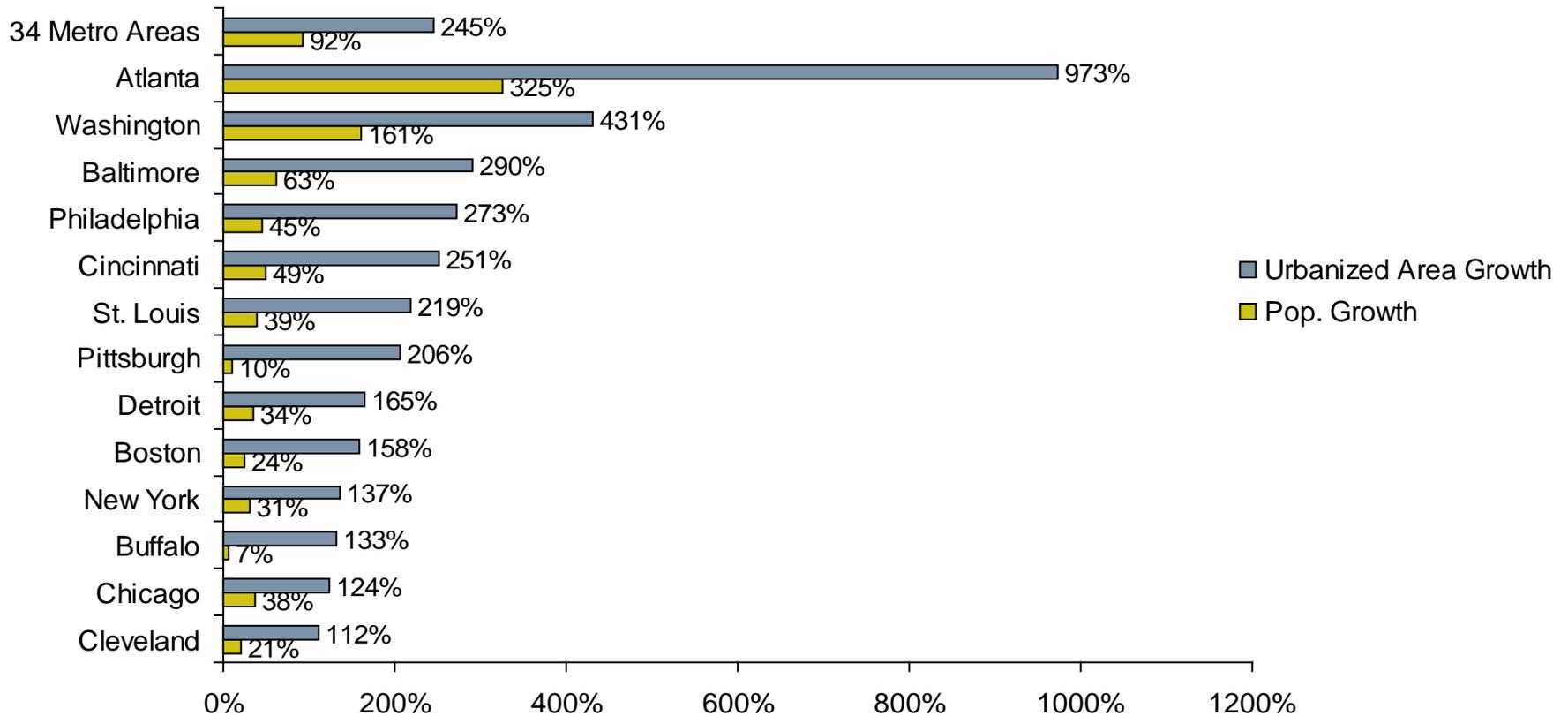
SUBURBS NOT AGING WELL



Source: Photograph of Levittown, Pennsylvania by Margaret Bourke-White, 1957

# THE SO-CALLED DREAM NO LONGER RANG TRUE OR AT LEAST IT DOESN'T ALIGN WITH MODERN LIFE

## Growth in Land Consumption Exceeds Population Growth in Metro Areas with Population > 1 million 1950-1990



SOURCE: U.S. Environmental Protection Agency (EPA) report *Our Built and Natural Environments: A Technical Review of the Interactions Between Land Use, Transportation, and Environmental Quality*

# EVERYTHING OLD IS NEW AGAIN

## “NEW LANGUAGE” OF REAL ESTATE DEVELOPMENT?

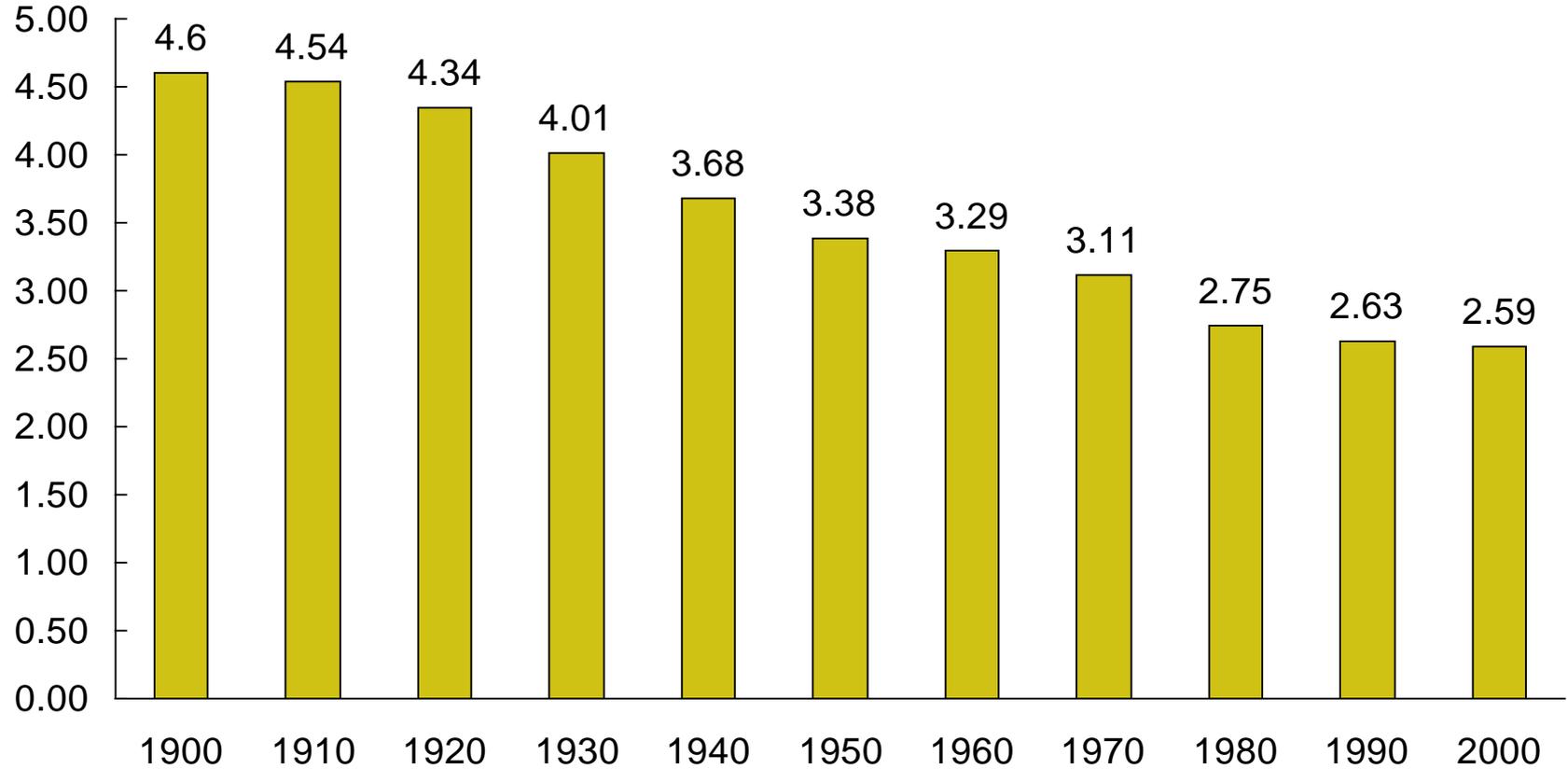


# HOUSEHOLD SIZE SHRINKING

## NATION GROWING ON BACKS OF SMALLER HOUSEHOLDS

**Average Household Size in the U.S.**  
1900–2000

*The average household size was 2.2 persons in the DC MSA in 2000.*



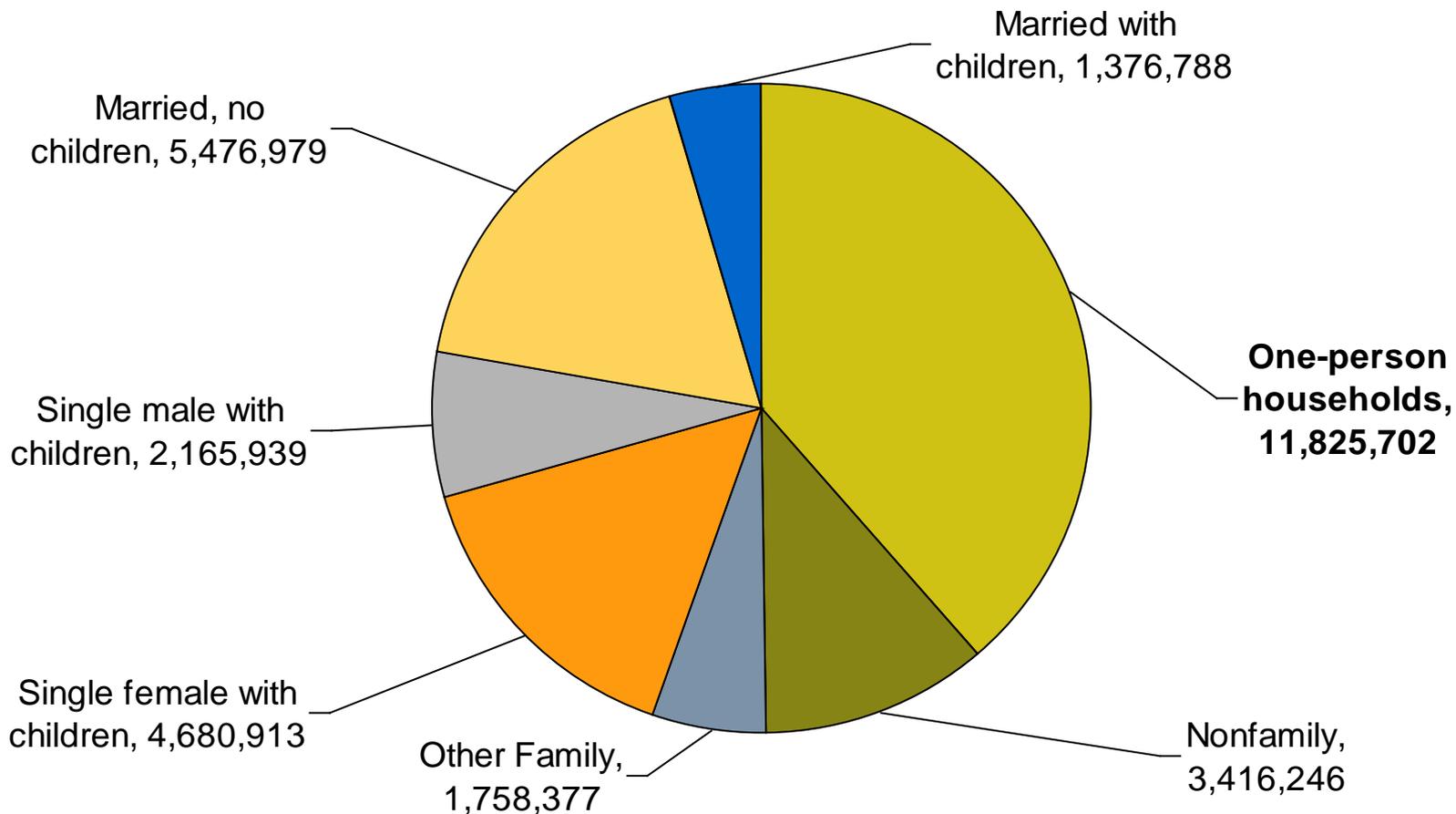
SOURCE: US Census

■ Persons Per Household

# > 85% GROWTH IN HOUSEHOLDS WITHOUT CHILDREN

## DIFFERENT HOUSEHOLD LANDSCAPE BY 2025

**Absolute Change in Households, United States**  
1980–2005

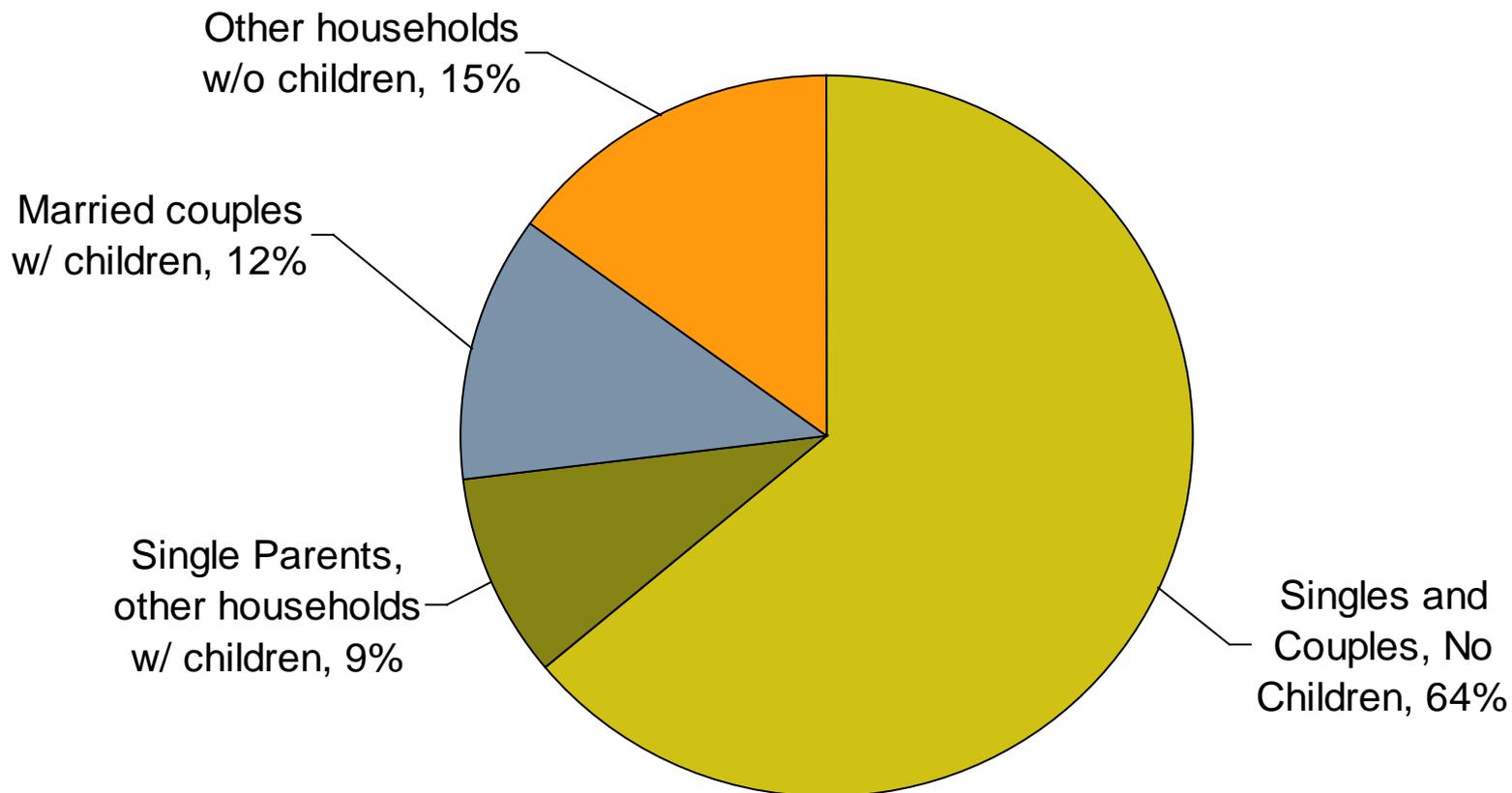


SOURCE: US Census

# EVEN MORE TRANSIT-ORIENTED DEVELOPMENT

## BULK OF DEMAND FROM SMALLER HOUSEHOLDS

### Estimated Future Demand for Transit-Oriented Development



SOURCE: Center for Transit-Oriented Development, 2006

# IMPACT OF RISING COSTS

## CONSUMERS WILL HAVE NO CHOICE BUT TO CHANGE

### ▶ Cost of living has increased substantially since 2006

- Gasoline prices nearly 30% higher
- Food prices nearly 20% higher



### Effect on location preferences

- ▶ Close-in and transit-accessible locations will be increasingly desirable
- ▶ Outer suburban/exurban locations at risk

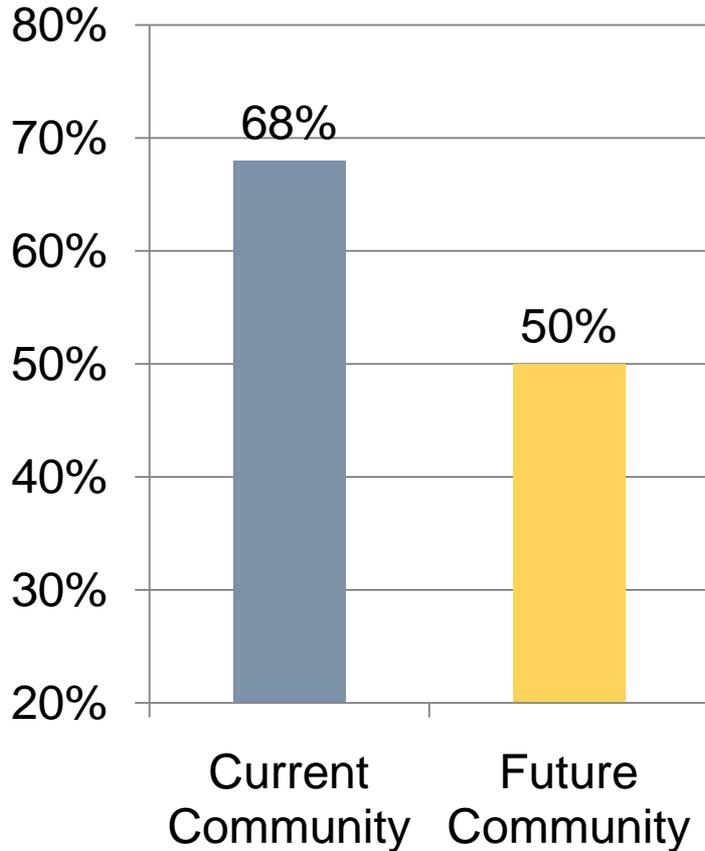
### Effect on housing affordability

- ▶ Typical household budget in 2006:
  - 29% Housing
  - 14% Transportation
    - 4% Gasoline
  - 11% Food and beverage
    - 6% Food at home (groceries)
- ▶ Increases in gas and grocery prices above equivalent to 7.5% of housing budget
- ▶ Smaller units may be in greater demand to meet tighter housing budgets

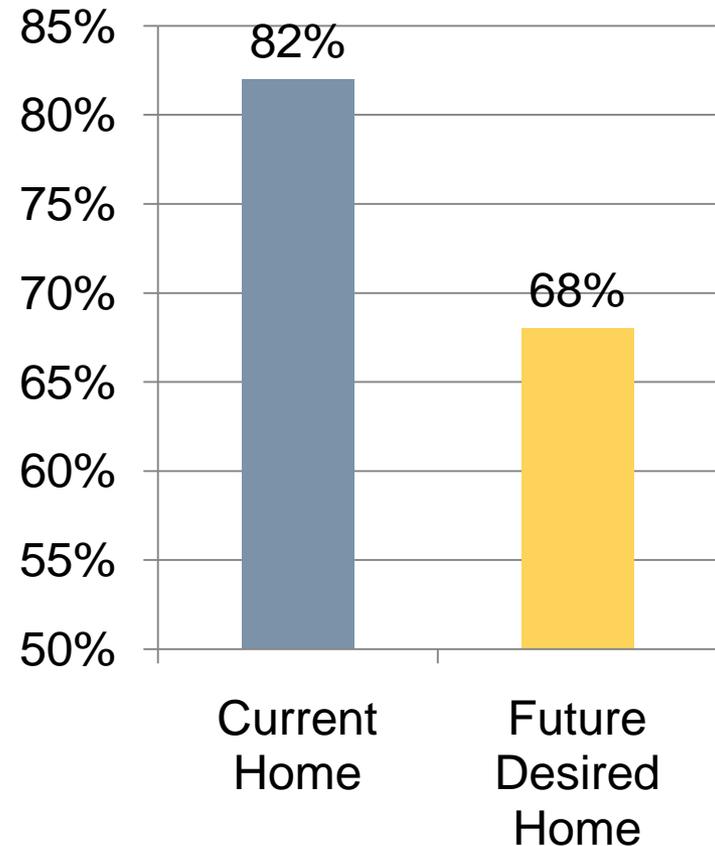
# PARADIGM SHIFT IN CONSUMER PREFERENCES

PENT-UP DEMAND FOR HIGHER-DENSITY, WALKABLE ENVIRONS

### Preference for Traditional Suburban Community



### Preference for Single-Family Detached Home

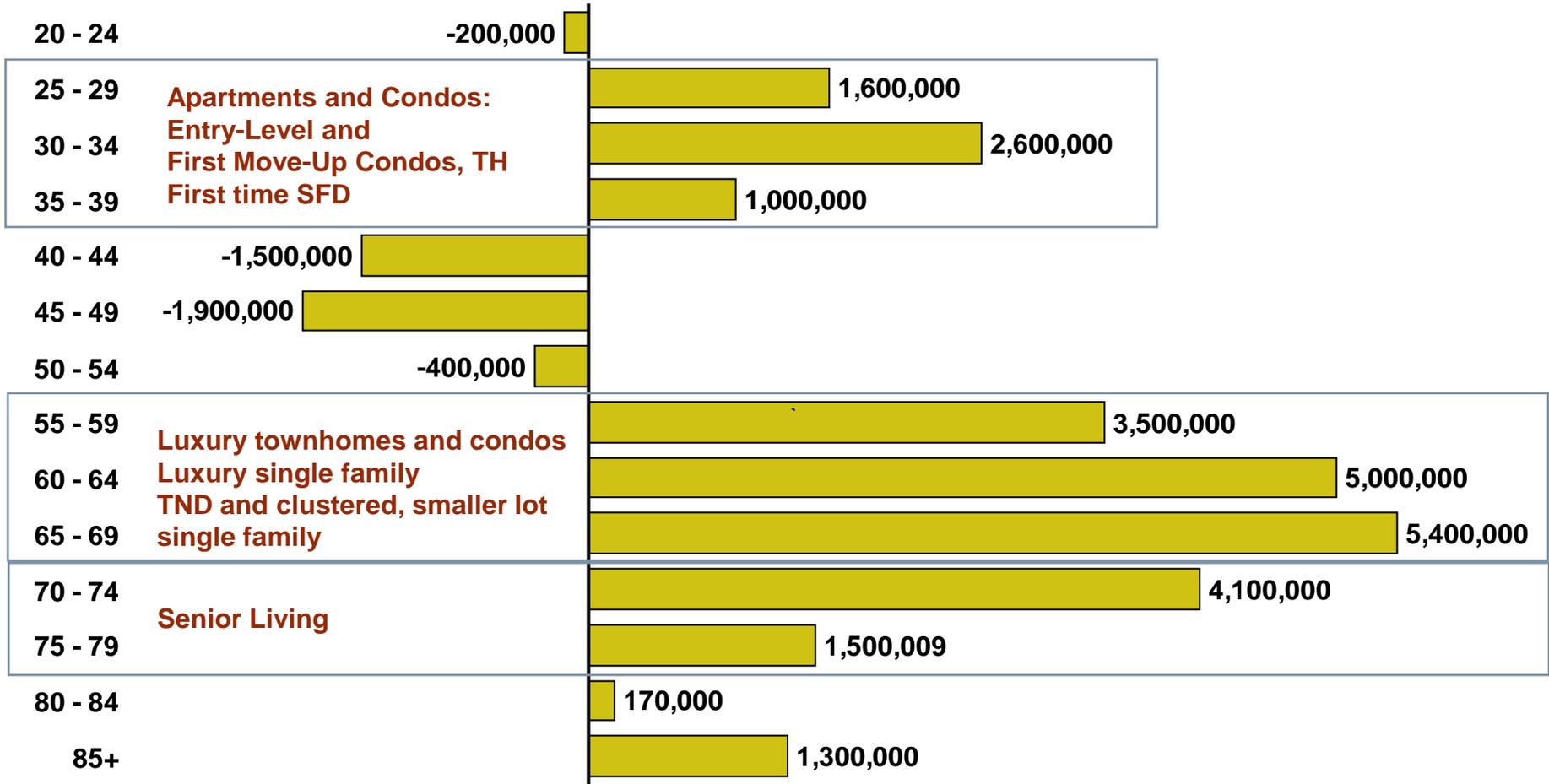


SOURCE: RCLCO Consumer Research

# DEMOGRAPHIC SHIFTS AND HOUSING DEMAND

## BUILT-IN DEMAND FOR HIGHER-DENSITY LIVING

**Projected Total Population Growth Rate by Age**  
2010–2020



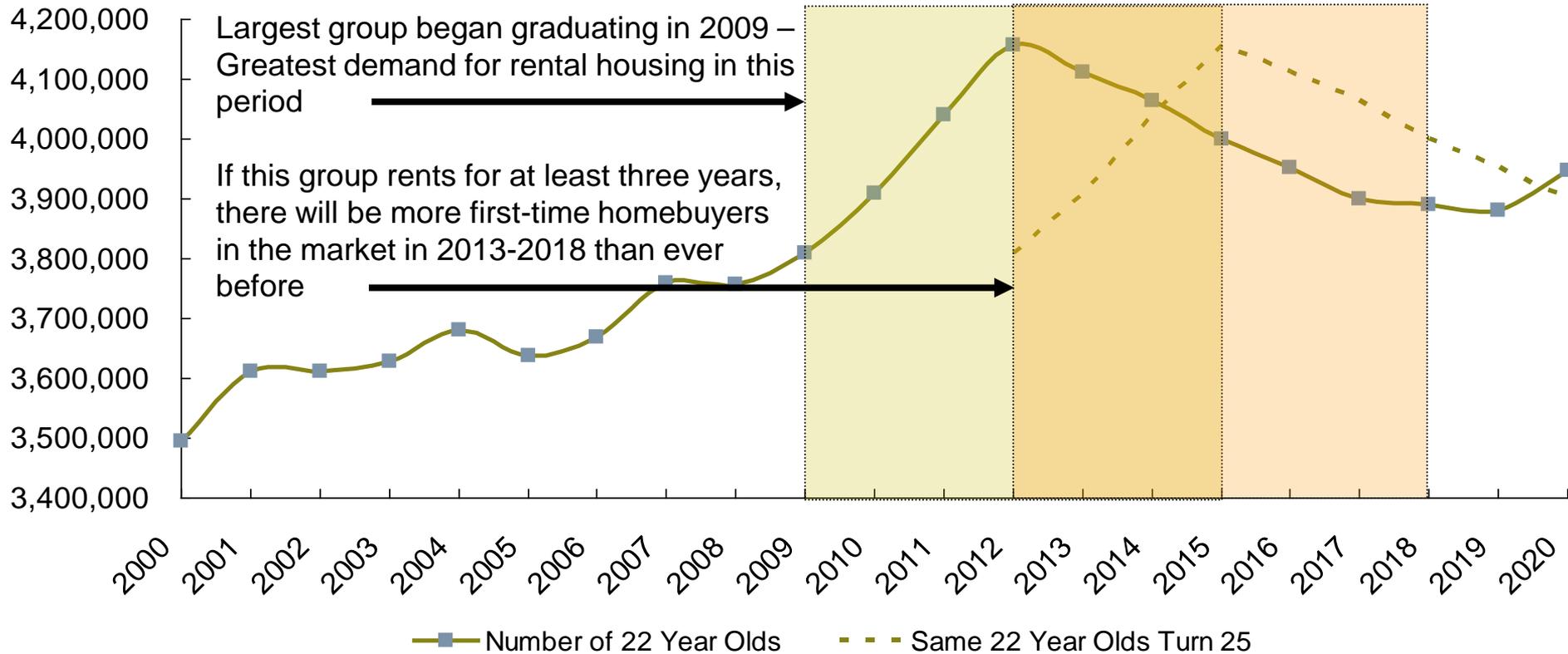
SOURCE: U.S. Census Bureau

# GEN Y MAKING ITS MARK TODAY

## SHAPING POST-RECESSION PLACEMAKING EFFORTS

### RCLCO Consumer Research shows:

- ▶ 41% of Generation Y plan to rent for at least three years
- ▶ 77% of Generation Y plan to live in an Urban Core

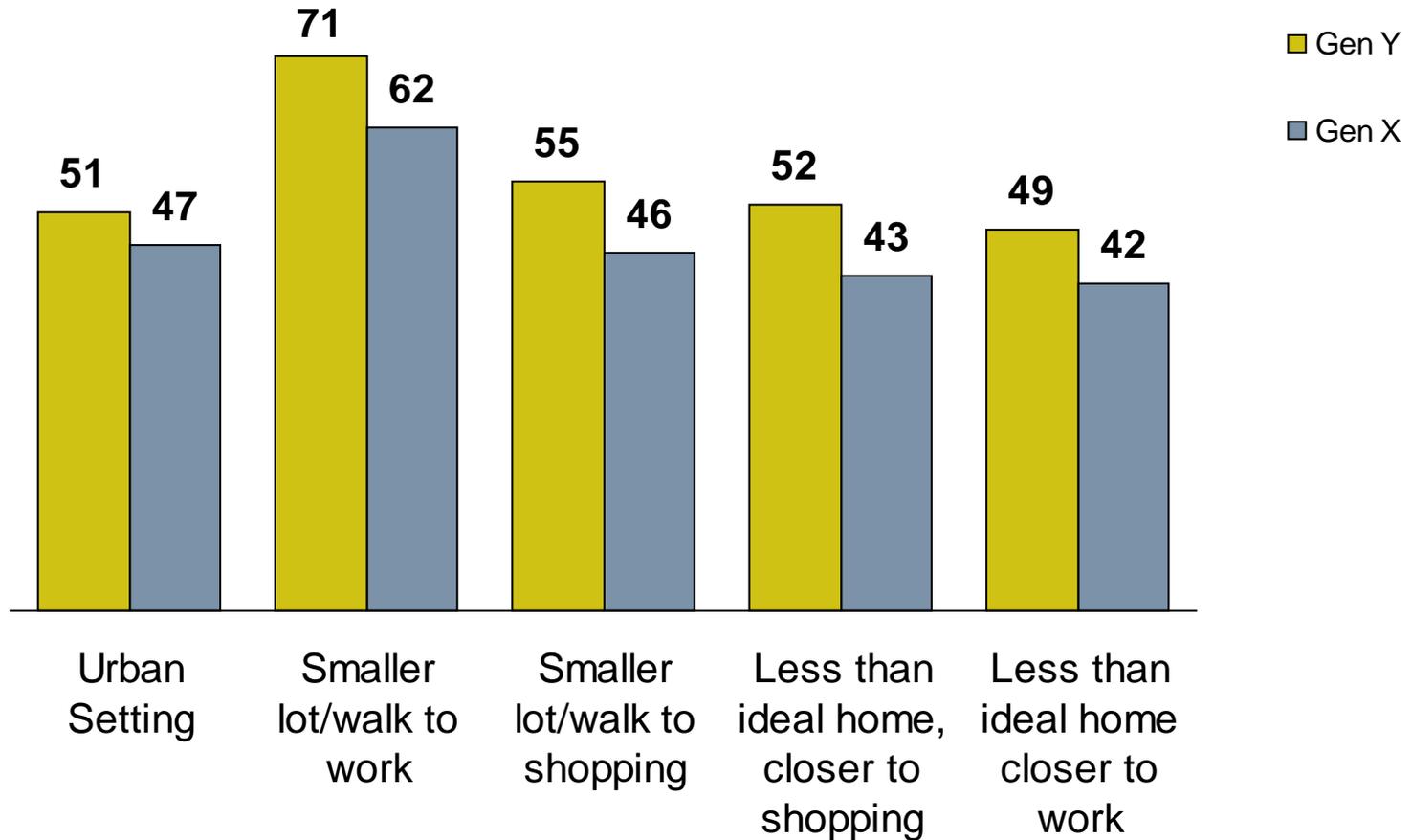


NOTE: Number of 22-year olds is based upon birth rate and does not factor in death rates and migration.

SOURCE: U.S. Centers for Disease Control and Prevention

# GEN X AND GEN Y SHOWING PREFERENCE FOR LOCATIONS THAT OFFER WALKABILITY

## Generational Tradeoffs (%)



SOURCE: RCLCO consumer research

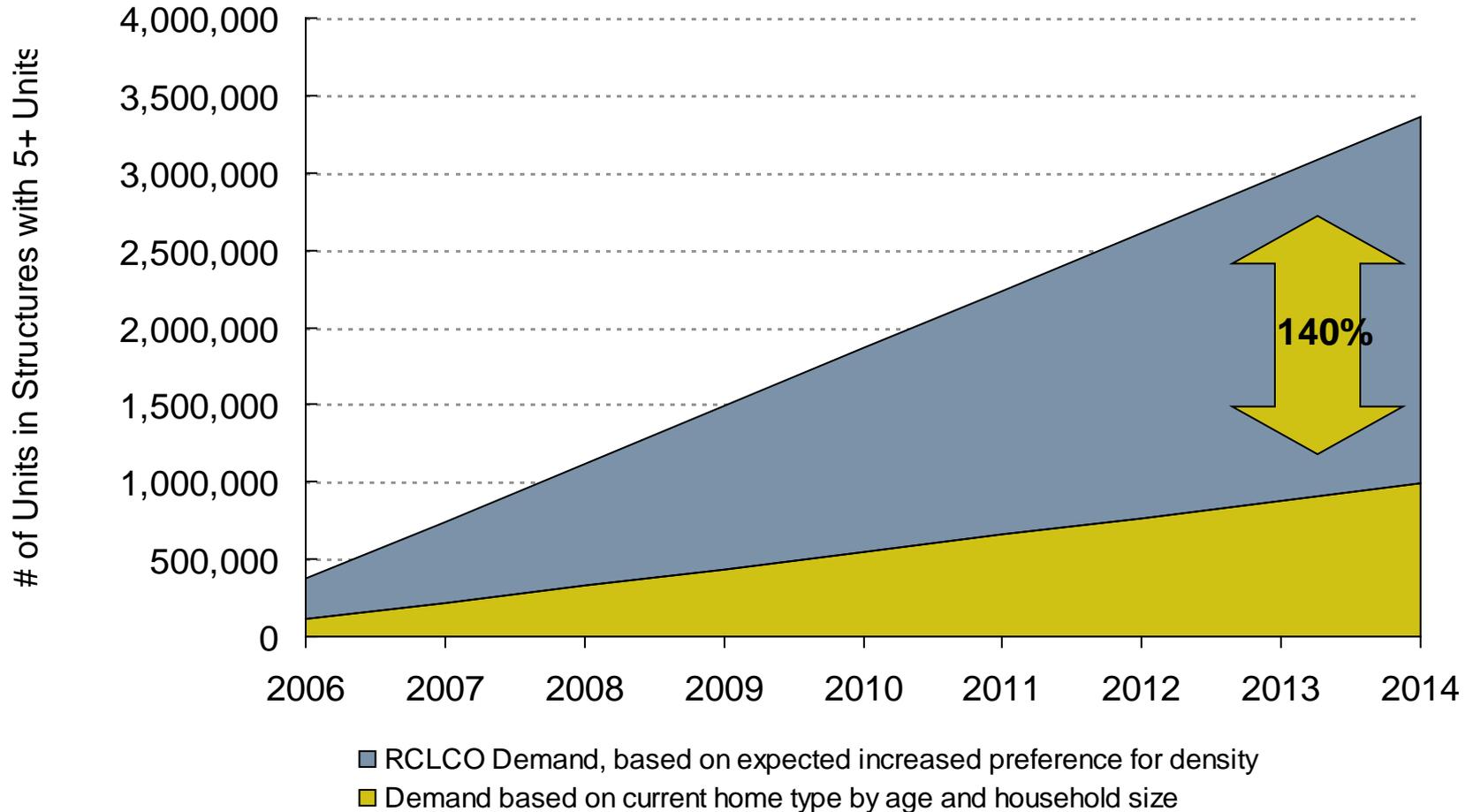
# GEN Y WILL PAY FOR WALKABLE, MIXED-USE CHALLENGE IS PROVIDING PRODUCT THEY CAN AFFORD



- Driven by convenience, connectivity, and a healthy work-life balance to maintain relationships
- **1/3 will pay more** to walk to shops, work, and entertainment
- 2/3 say that living in a walkable community is important
- More than 1/2 of Gen Y would trade lot size for proximity to shopping or to work
- Even among families with children, one-third or more are willing to trade lot size and “ideal” homes for walkable, diverse communities

SOURCE: RCLCO Consumer Research

# DEMOGRAPHIC SHIFT + PREFERENCE SHIFT = POTENTIALLY MUCH HIGHER DEMAND FOR DENSITY



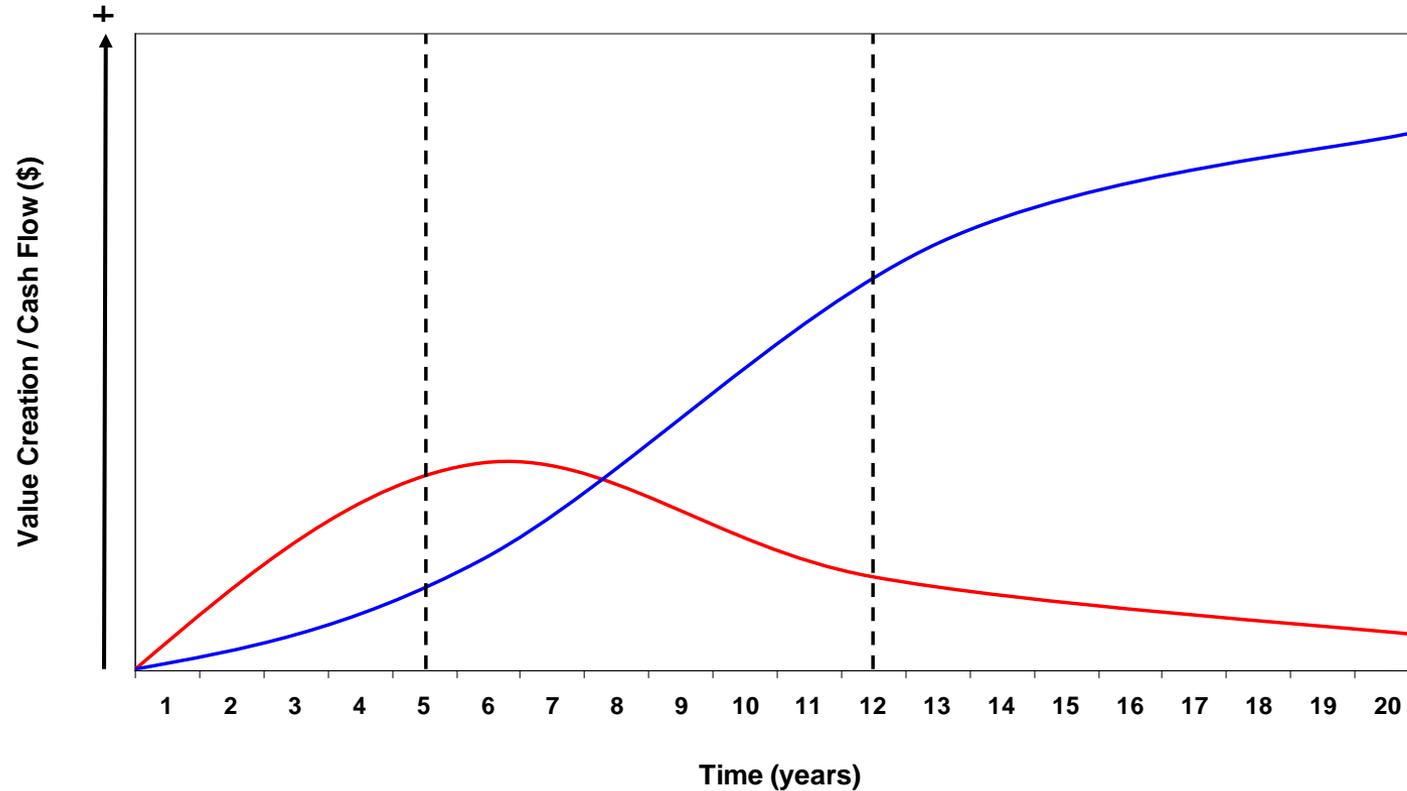
SOURCE: RCLCO Consumer Research



# The Economics of Transit-Oriented Development

# MIXED-USE = GREATER LONG-TERM VALUE

Financial Characteristics of Mixed-Use Areas with Critical Mass (Blue)  
versus traditional Suburban Development (Red)



SOURCE: The Brookings Institution

# TRANSIT-PROXIMITY CREATES VALUE

## Land Use

## Range of Property Value Premium

Single Family Residential

+2% w/in 200 ft of station to +32% w/in 100 ft of station  
(San Diego Trolley, 1992) (St. Louis MetroLink Light Rail, 2004)

Condominium

+2% to 18% w/in 2,640 ft of station  
(San Diego Trolley, 2001)

Apartment

+0% to 4% w/in 2,640 ft of station to +45% w/in 1,320 ft of station  
(San Diego Trolley, 2001) (VTA Light Rail, 2004)

Office

+9% w/in 300 ft of station to +120% w/in 1,320 ft of station  
(Washington Metrorail, 1981) (VTA Light Rail, 2004)

Retail

+1% w/in 500 ft of station to +167% w/in 200 ft of station  
(BART, 1978) (San Diego Trolley, 2004)

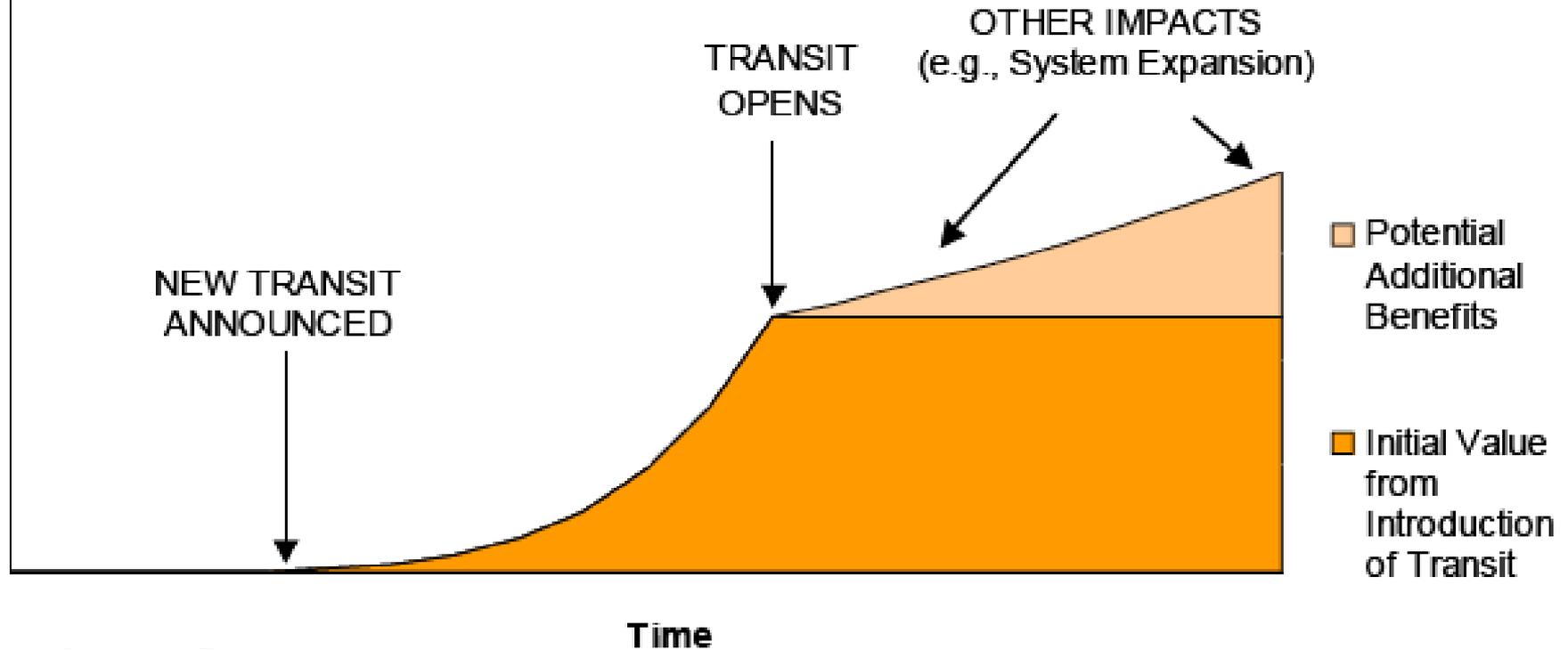
SOURCE: Reconnecting America

# MOST VALUE ACCRUES PRE-DEVELOPMENT

## OPPORTUNITY TO LEVERAGE VALUE IS *BEFORE* OPENING

Current RCLCO research estimates value increases of between 6% and 30%, depending on the existing and future land uses.

Value Premium from Transit



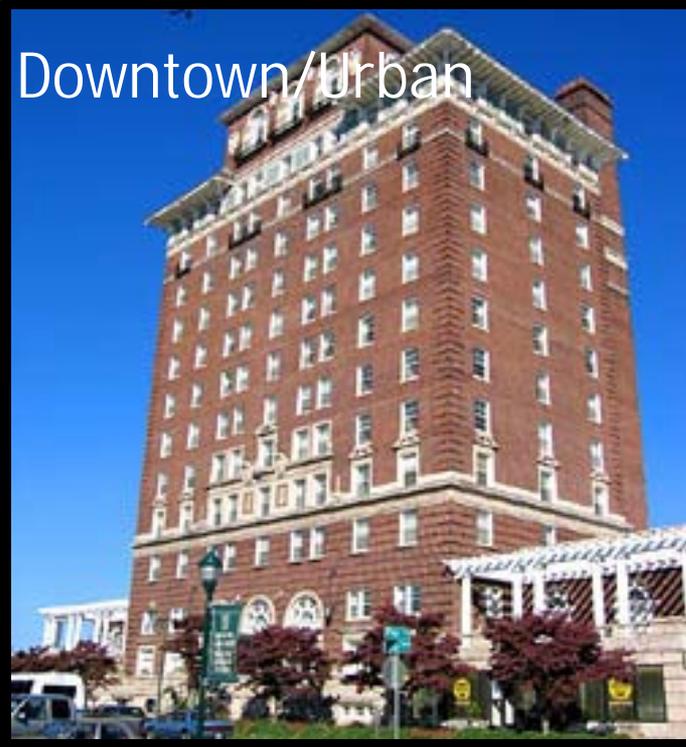
SOURCE: Reconnecting America

# DISCOVERING A SUBSIDIZED SUBURBIA PUBLIC INFRASTRUCTURE COST/DU

\$ 15,956

\$ 28,042

Downtown/Urban



Linear/Suburban



The \$12,086 difference in costs means more tax dollars spent on suburban households

result is less money for public green space, schools, transportation networks, and basic services

# DISCOVERING A SUBSIDIZED SUBURBIA

## THE HIGH COST OF LOW DENSITY



\$ 50,800

Total Taxes/Acre to City



\$ 414,000

Total Taxes/Acre to City

# SO ... HOW *DID* WE DO THIS BEFORE?

## *DEVELOPMENT-ORIENTED TRANSIT*



Rock Creek Railway



Senator Francis  
Newland

**The Chevy Chase Land Company**  
of Montgomery County, Maryland

# NEW TRANSIT INCREASES PROPERTY VALUES PORTLAND, OR

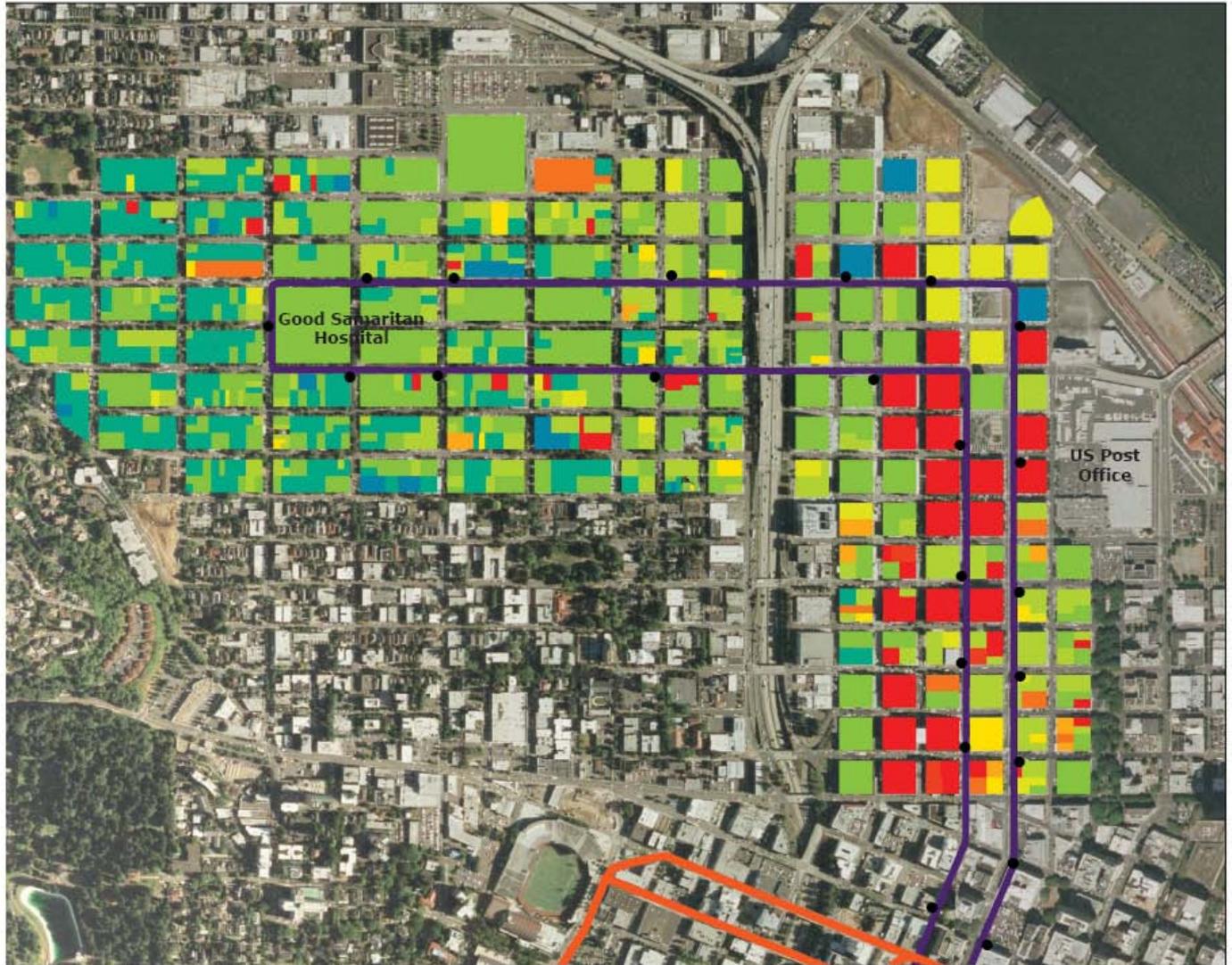
## Portland Streetcar Property Value Change 1997-2003

### Legend

- Streetcar Stop
- Streetcar Line
- MAX Light Rail

### Percent Change 97-03

- < 0
- 0 - 50
- 50 - 100
- 100 - 150
- 150 - 200
- 200 - 250
- 250 - 300
- 300 - 350
- 350 - 400
- 400+



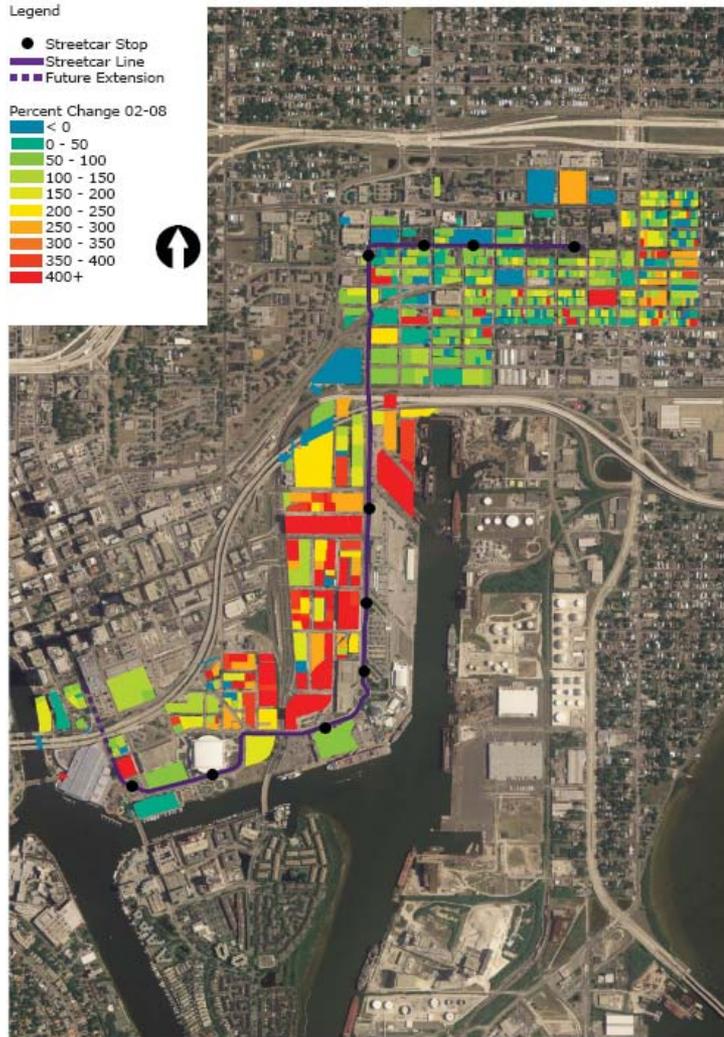
Original cost - \$54M

Catalyzed  
Investment - \$3.8B

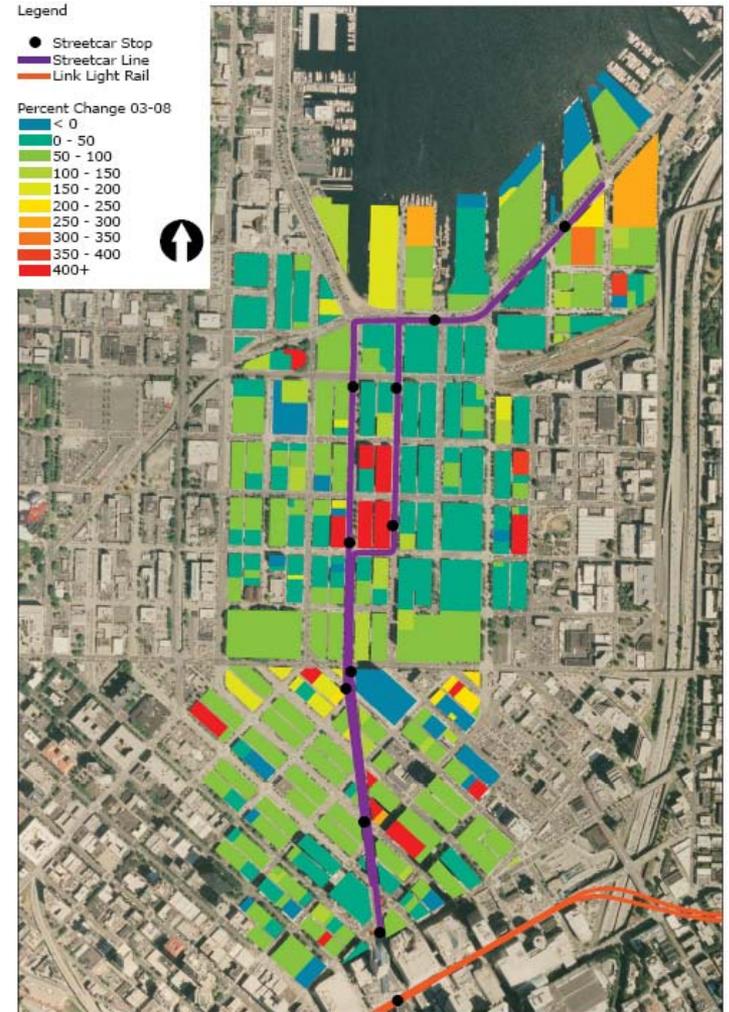
**Multiplier – 74X**

SOURCE: RCLCO,  
Reconnecting America

# NEW TRANSIT INCREASES PROPERTY VALUES SEATTLE, WA AND TAMPA, FL



SOURCE: RCLCO, Reconnecting America





## Transit-Oriented Development – Moving Forward

# TREMENDOUS GROWTH IN REGION

## INTENSE COMPETITION FOR JOBS, HOUSEHOLDS

- Over the next 25 years, the DC region will add 1.25 million new jobs and 1.5 million new residents
- *Jurisdictions that provide urban, transit-oriented places will capture these jobs and households first*

# FEDERAL GOV'T EMBRACING TRANSIT

## LOWER COMMUTE COSTS, LOWER ENERGY COSTS

- Federal Gov't has seen the light – they now understand the linkages between land use, transportation, and housing
- Executive Order 13514 mandates “sustainable locations” for GSA buildings
- In the Washington Metropolitan area, the U.S. General Service Agency (GSA) has made proximity to transit a requirement of all future federal government buildings located within WMATA's service jurisdiction

# FEDERAL GOV'T EMBRACING TRANSIT

## LOWER COMMUTE COSTS, LOWER ENERGY COSTS

At Arlington's Ballston station alone, this policy in combination with disciplined planning helped to attract the

National Science Foundation

National Pollution Control Center

U.S. Army Legal Services Agency

Federal Deposit Insurance Corporation

Applied Research Planning Agency

National Rural Electric Cooperative Association

# BACK TO THE CITY

## URBAN PLACES EXPLODING WITH GROWTH



“United Air Lines is set to move its operational headquarters, starting this year, from the Illinois suburb of Elk Grove to downtown Chicago. Quicken Loans, also citybound, recently began leasing space in Detroit and plans to build its headquarters there. And in February, Walgreens announced its acquisition of New York drugstore chain Duane Reade, signaling a deliberate decision to improve its capabilities in urban settings.”

“Commuters who live an hour away from work would need to earn 40% more money than they currently do to be as satisfied with their lives as non-commuters.”

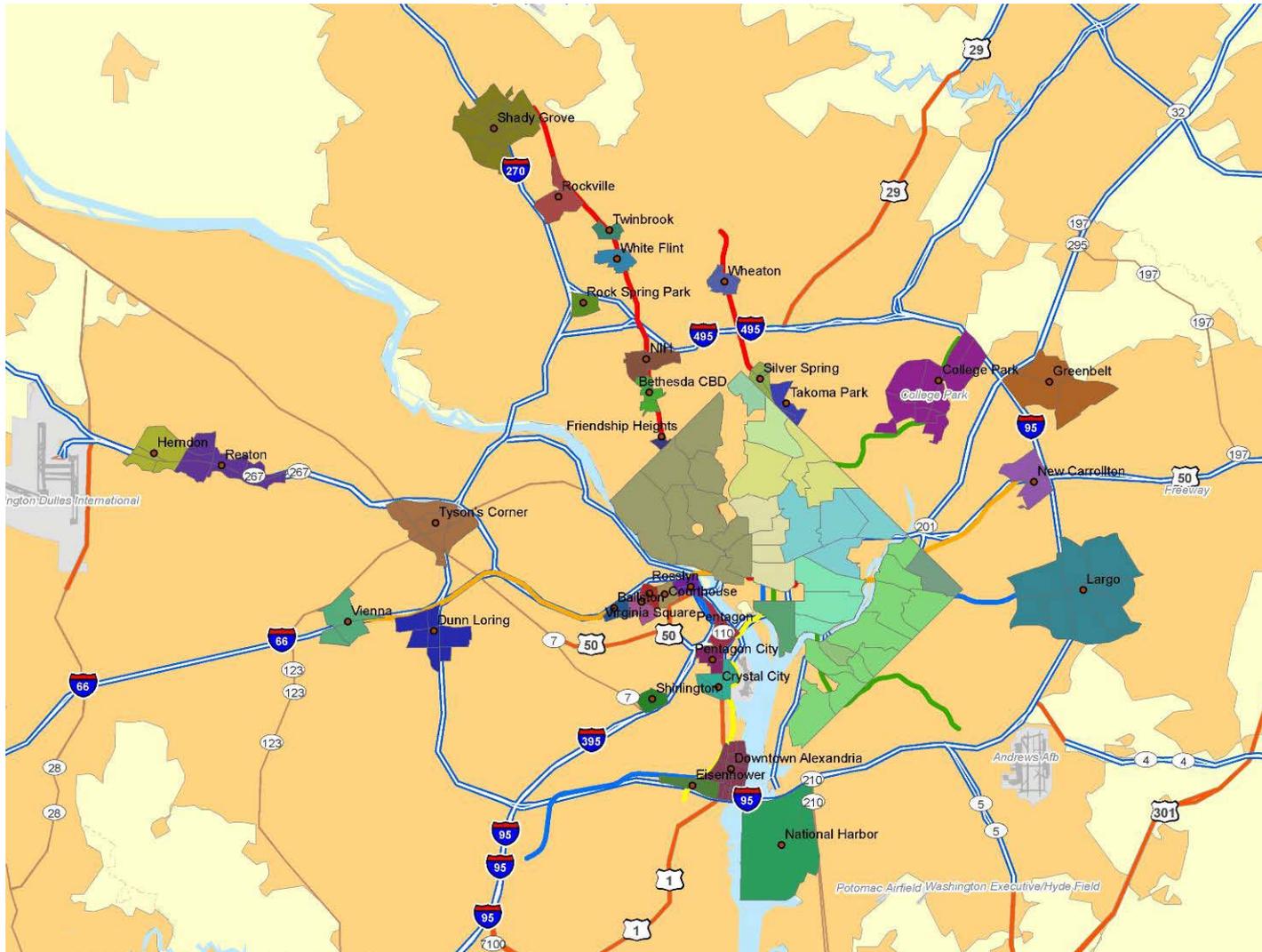
- Economists Bruno S. Frey and Alois Stutzer

“Increasingly CEOs understand that without a vibrant central city, their region becomes less competitive. Good CEOs care about the fate of their cities, because they have to question whether that is the place where they can attract the talent they need.”

- Carol Coletta, President, CEOs for Cities

# DENSIFICATION OF D.C. REGION UNDERWAY

## CORE AND SUBURBS ACCELERATING DENSE HH GROWTH



Approximately 20% of the HH growth between 2005 and 2015 will take place within the rapidly densifying areas shown in the map to the left.

These households will drive demand for more urbane, walkable, transit-oriented environments.

Source: MWCOG Regional Activity Centers, RCLCO

# PRINCE GEORGE'S COUNTY HAS ADVANTAGE MOST METRO STATIONS OUTSIDE WASHINGTON, D.C.

15 Metro  
stations

5 MARC  
stations

Future  
Purple Line  
stations



Source: MWCOG Regional Activity Centers, RCLCO

# PRINCE GEORGE'S COUNTY HAS ADVANTAGE BUT THAT ADVANTAGE IS BEING CHALLENGED - NOW

- Prince George's County's 15 Metro stations contain 1/3 of the region's developable land around Metro.
- There are approximately 2,500 acres of undeveloped or under-developed land within Prince George's County
- If that land were developed as TOD, it could capture +/- 500,000 office jobs and +/- 150,000 households
- But ... the Silver Line is on the way, too ...

# DC/MD/VA METRO AREA 1/2 MILE FROM METRO STATION DATA

Station	Population	Households	Median Income	Businesses	Employees
Addison Road/Seat Pleasant	2,427	779	\$69,914	82	605
Anacostia	8,130	2,616	\$24,853	188	2,498
Archives-Navy Mem'l	3,237	1,990	\$57,444	2,928	85,084
Arlington/Cemetery	2,392	1,334	\$78,972	65	1,037
Ballston-MU	15,473	8,837	\$95,075	970	25,011
Benning Road	8,581	3,778	\$37,954	156	1,723
Bethesda	7,273	4,220	\$82,897	2,872	39,897
Braddock Road	8,394	3,856	\$100,948	985	9,593
Branch Ave	1,208	390	\$68,418	76	2,159
Brookland-CUA	6,073	1,826	\$50,799	318	3,389
Capitol Heights	1,344	530	\$57,847	34	208
Capitol South	6,638	3,903	\$72,410	745	13,334
Cheverly	13,969	4,460	\$48,779	318	3,279
Clarendon	11,173	5,718	\$112,820	999	11,525
Cleveland Park	8,055	5,380	\$83,963	306	3,679
College Park/U of Md	2,476	969	\$58,359	762	6,615
Columbia Heights	34,897	5,380	\$44,008	168	1,514
Congress Heights	7,372	2,086	\$24,509	96	3,085
Court House	17,768	10,041	\$89,384	1,119	15,996
Crystal City	10,237	6,157	\$87,439	869	16,804
Deanwood	5,785	2,142	\$42,843	110	2,636
Dunn Linn/Mezfield	4,543	1,923	\$84,655	346	6,410
Dupont Circle	15,508	12,870	\$76,409	6,374	86,665
East Falls Church	4,212	1,676	\$148,382	172	1,319

Line	Station	Population	Households	Median Income	Businesses	Employees
	<b>TOTAL</b>	<b>650,201</b>	<b>302,669</b>		<b>96,071</b>	<b>1,775,706</b>
	<b>AVERAGE</b>	<b>7,560</b>	<b>3,519</b>	<b>\$67,687</b>	<b>1,117</b>	<b>20,648</b>

Forest Glen	4,749	1,887	\$53,889	592	21,961
Forest Hills	13,794	7,413	\$72,410	2,459	67,779
Forest Gle	4,853	1,806	\$58,359	170	27,600
Fort Totten	7,156	3,112	\$68,359	81	1,991
Francis-Schlesinger	1,228	508	\$68,359	96	1,491
Gallery Pl-Chinatown	9,044	4,932	\$33,155	4,140	106,452
Georgia Ave/Petworth	17,819	6,172	\$44,884	519	4,821
Glenmont	3,973	1,330	\$69,306	52	420
Groverbelt	12,198	608	\$54,201	658	9,231
Grosvenor-Strathmore	4,725	2,977	\$76,779	91	853
Huntington	2,719	1,194	\$89,307	131	2,198
Judiciary Sq	7,798	4,137	\$31,998	3,430	95,805
King Street	5,871	3,109	\$116,468	1,088	11,494
Lansdowne	4,424	1,524	\$42,894	292	2,289
Largo Town Center	1,759	908	\$49,279	415	5,658
L'Enfant Plaza	2,646	1,705	\$52,971	735	30,238
McPherson Sq	12,507	7,105	\$45,355	7,638	138,465
Medical Center	1,346	416	\$120,890	330	3,311
Metro Center	2,950	2,065	\$51,682	5,093	117,666
Minnesota Ave	9,249	4,056	\$35,069	169	2,348
Morgan Boulevard	4,247	1,285	\$63,796	71	1,251
M Vernon Sq - 7th St/Convent	20,390	10,039	\$42,116	3,034	55,055
Navy Yard	4,755	2,959	\$36,894	292	9,447
Naylor Road	6,801	3,080	\$44,225	62	404
New Carrollton	502	165	\$50,873	170	3,571
New York Ave	7,468	2,750	\$43,713	604	11,010
Pentagon	1,991	1,334	\$78,972	309	6,596
Pentagon City	10,240	6,272	\$80,359	456	8,845
Potomac Ave	8,926	3,987	\$59,919	529	5,597
Prince George's Plaza	4,265	1,604	\$55,790	387	4,260
Rhode Island Ave	7,469	3,078	\$37,304	314	5,043
Riverdale	4,997	2,189	\$63,674	962	8,936
Ronald Reagan Washington N	4,275	2,579	\$91,455	514	9,511
Rosslyn	8,871	5,452	\$72,113	1,300	25,127
Shady Grove	1,786	855	\$109,458	196	3,019
Shaw-Howard Univ	17,558	6,884	\$46,624	924	11,333
Shwer Spring	13,306	7,608	\$58,150	1,587	19,164
Smithsonian	-	-	-	446	20,340
Southern Ave	5,686	2,162	\$41,897	107	1,996
Stadium/Armory	9,583	3,367	\$50,882	145	1,609
Sully	3,815	1,438	\$55,956	93	498
Takoma	5,534	2,365	\$79,164	363	2,995
Tenleytown-AU	5,023	2,216	\$129,726	399	4,855
Twinbrook	4,860	2,113	\$68,507	552	12,394
U St/African-Amer Civil War M	21,888	10,215	\$53,638	1,143	12,372
Union Station	8,742	3,630	\$53,530	1,271	27,539
Van Dorn Street	887	363	\$88,347	14	2,351
Van Ness-UDC	8,145	5,003	\$96,747	73	4,957
Venning/Farfax-GMU	6,019	2,287	\$93,301	133	1,888
Virginia-Square-GMU	12,625	6,923	\$97,141	811	16,048
Waterfront/SEU	12,640	7,428	\$46,428	514	17,442
West Falls Church/VT/UA	2,320	1,065	\$121,194	179	1,438
West Hyattsville	8,200	3,147	\$46,675	156	889
Wheaton	6,132	2,269	\$66,813	759	6,575
White Flint	3,478	1,942	\$90,349	85	15,256
Woodley Park-Zoo/Adams M	12,347	7,970	\$90,292	567	7,297
<b>TOTAL</b>	<b>650,201</b>	<b>302,669</b>		<b>96,071</b>	<b>1,775,706</b>
<b>AVERAGE</b>	<b>7,560</b>	<b>3,519</b>	<b>\$67,687</b>	<b>1,117</b>	<b>20,648</b>

SOURCE: RCLCO, CLARITAS

# MONTGOMERY COUNTY 1/2 MILE FROM METRO DATA

Line	Station	Population	Households	Median Income	Businesses	Employees
	Bethesda	7,273	4,220	\$82,108	2,872	39,897
	Forest Glen	4,853	1,962	\$82,355	170	4,263
	Friendship Heights	9,514	5,086	\$101,368	1,154	19,807
	Glenmont	3,973	1,330	\$69,306	52	420
	Grosvenor-Strathmore	4,725	2,977	\$76,779	91	853
	Medical Center	1,346	416	\$120,890	330	3,311
	Rockville	4,997	2,168	\$63,674	982	8,926
	Shady Grove	1,786	855	\$109,458	196	3,015
	Silver Spring	13,306	7,608	\$58,150	1,587	18,165
	Twinbrook	4,860	2,113	\$68,507	552	12,394
	Wheaton	6,132	2,269	\$66,813	759	6,575
	White Flint	3,478	1,942	\$90,346	855	15,256
	<b>TOTAL</b>	<b>66,243</b>	<b>32,946</b>		<b>9,600</b>	<b>132,882</b>
	<b>AVERAGE</b>	<b>5,520</b>	<b>2,746</b>	<b>\$82,480</b>	<b>800</b>	<b>11,074</b>

SOURCE: RCLCO, CLARITAS

# VIRGINIA

## 1/2 MILE FROM METRO DATA

Line	Station	Population	Households	Median Income	Businesses	Employees
	Arlington Cemetery	2,392	1,334	\$78,972	65	1,037
	Ballston-MU	15,473	8,837	\$95,075	970	25,011
	Braddock Road	8,394	3,856	\$100,948	985	9,593
	Clarendon	11,173	5,718	\$112,820	999	11,525
	Court House	17,768	10,041	\$89,384	1,119	15,996
	Crystal City	10,237	6,157	\$87,439	869	16,804
	Dunn Loring Merrifield	4,543	1,953	\$84,655	346	6,419
	East Falls Church	4,212	1,676	\$148,382	172	1,319
	Eisenhower Ave	3,228	1,553	\$112,289	297	5,335
	Franconia-Springfield	1,228	635	\$88,347	96	1,491
	Huntington	2,719	1,194	\$89,307	131	2,198
	King Street	5,871	3,109	\$116,468	1,098	11,494
	Pentagon	1,991	1,334	\$78,972	309	6,596
	Pentagon City	10,240	6,272	\$80,359	456	8,845
	Ronald Reagan Washington Ne	4,275	2,579	\$91,455	514	9,511
	Rosslyn	8,871	5,452	\$72,113	1,300	25,127
	Van Dorn Street	887	363	\$88,347	144	2,351
	Vienna Fairfax-GMU	6,019	2,287	\$93,301	133	1,888
	Virginia Square-GMU	12,605	6,953	\$97,141	811	16,048
	West Falls Church VT/UVA	2,320	1,065	\$121,194	179	1,438
	<b>TOTAL</b>	<b>134,446</b>	<b>72,368</b>		<b>10,993</b>	<b>180,026</b>
	<b>AVERAGE</b>	<b>6,722</b>	<b>3,618</b>	<b>\$96,348</b>	<b>550</b>	<b>9,001</b>

SOURCE: RCLCO, CLARITAS

# PRINCE GEORGE'S COUNTY 1/2 MILE FROM METRO DATA

Line	Station	Population	Households	Median Income	Businesses	Employees
	Addison Road Seat Pleasant	2,427	779	\$69,914	82	605
	Branch Ave	1,208	390	\$68,418	76	2,159
	Capitol Heights	1,344	530	\$57,847	34	208
	Cheverly	13,969	4,460	\$48,779	318	3,279
	College Park-U of Md	2,476	869	\$58,359	762	6,615
	Greenbelt	12,198	608	\$54,201	658	9,231
	Landover	4,434	1,550	\$42,899	124	2,260
	Largo Town Center	1,759	908	\$49,279	415	5,658
	Morgan Boulevard	4,247	1,285	\$63,796	71	1,251
	Naylor Road	6,801	3,080	\$44,225	62	404
	New Carrollton	502	165	\$50,873	170	3,571
	Prince George's Plaza	4,265	1,604	\$55,790	387	4,260
	Southern Ave	5,686	2,162	\$41,897	107	1,996
	Suitland	3,815	1,438	\$55,956	88	498
	West Hyattsville	8,200	3,147	\$46,675	156	889
	<b>TOTAL</b>	<b>73,331</b>	<b>22,975</b>		<b>3,510</b>	<b>42,884</b>
	<b>AVERAGE</b>	<b>4,889</b>	<b>1,532</b>	<b>\$53,927</b>	<b>234</b>	<b>2,859</b>

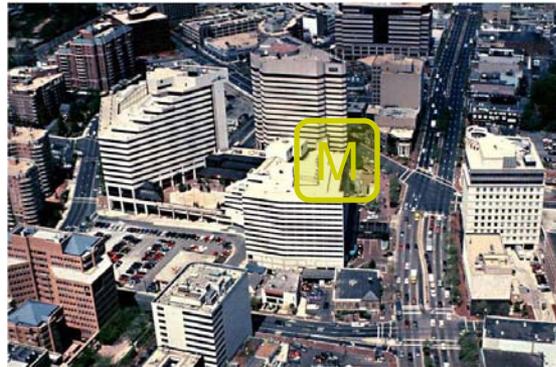
SOURCE: RCLCO, CLARITAS



## 3 Ps – Planning, Patience, and Payoff

# BETHESDA

Bethesda, one of the country's most affluent and educated areas, is the first stop outside D.C. along Metro's Red Line. Dense construction followed the station's completion in 1984 and its success has reached national prominence. The thoughtful combination of residential, office, and retail construction was completed through partnership with WMATA and provides an example of how transit can aid in place making and spur additional economic development.



## WITHIN .5 MILES OF THE METRO

### Households:

1990	3,389
2000	3,962
2009	4,233
2014	4,405

### Growth Rate:

1990-2000	16.92%
2000-2009	6.84%
2009-2014	4.07%

2009 Avg. Income	\$120,599
2009 Median Income	\$82,256
Average HH Size	1.72
2009 Median Age	39.51

2009 Total Businesses	2,895
Private Sector	2,700
Public Sector	195
2009 Total Employees	40,067

Total Gross Leasable Retail Area (Sq.Ft.)	708,070
Mixed Uses	20%

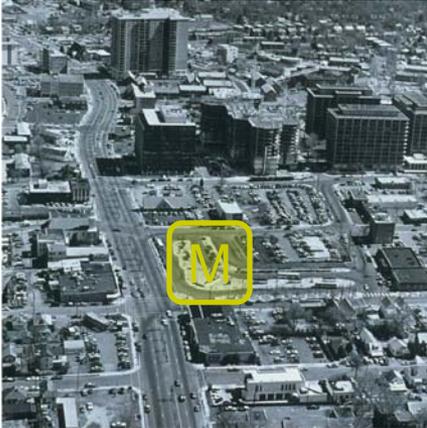
## Metro Ridership

Station	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
Bethesda	8,469	8,591	8,717	9,205	9,430	9,946	10,530	10,738	10,968	10,730

SOURCE: WMATA, CNU, RCLCO, CLARITAS, FORBES

# BALLSTON

Ballston's metro began operations in 1979 and serves not only the Ballston community but also Marymount University. The station is part of a five station corridor in Arlington, VA which has managed to keep development density close to the station and while also avoiding increased local traffic. Arlington's unemployment rate has consistently remained the lowest in all of Virginia and the NY Times, in reference to the recent recession, touted the area an "oasis of stability amid a downturn".



## WITHIN .5 MILES OF THE METRO

Households:	
1990	4,226
2000	7,266
2009	8,990
2014	9,852
Growth Rate:	
1990-2000	71.94%
2000-2009	23.73%
2009-2014	9.58%

2009 Avg. Income	\$121,362
2009 Median Income	\$94,585
Average HH Size	1.78
2009 Median Age	38.1

2009 Total Businesses	980
Private Sector	865
Public Sector	116
2009 Total Employees	25,191

Total Gross Leasable Retail Area (Sq.Ft.)	522,952
Mixed Uses	100%

### Metro Ridership

<b>Station</b>
Ballston

	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
	10,450	11,257	11,214	11,262	11,620	11,639	12,322	12,564	12,807	12,414

SOURCE: CNU, RCLCO, CLARITAS, NY TIMES

# GALLERY PLACE – CHINATOWN

Gallery Place began Red Line service in 1976, Yellow Line in 1983 and the Green Line in 1991. In the 1990s this area of downtown D.C. was a desolate stretch of empty storefronts and boarded-up buildings. The station, coupled with the opening of the Verizon Center in 1997 and remodel of the National Portrait Gallery, has sparked an array of development that has created a lively, hip, 24-hour entertainment and retail district.

## WITHIN .5 MILES OF THE METRO

### Households:

1990	1,516
2000	2,281
2009	4,084
2014	4,958

### Growth Rate:

1990-2000	50.52%
2000-2009	79.02%
2009-2014	21.40%

2009 Avg. Income	\$75,557
2009 Median Income	\$32,841
Average HH Size	1.63
2009 Median Age	42.28

2009 Total Businesses	4,137
Private Sector	3,248
Public Sector	888
2009 Total Employees	109,018

Total Gross Leasable Retail Area (Sq.Ft.)	268,838
Mixed Uses	100%



## Metro Ridership

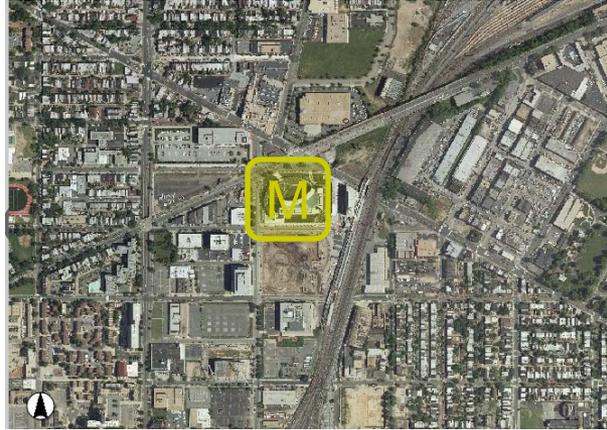
**Station**  
Ballston

2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
10,563	12,494	13,833	15,665	16,443	19,474	20,673	21,921	25,136	25,747

SOURCE: WMATA, RCLCO, CLARITAS

# NEW YORK AVENUE

The New York Avenue metro station opened in late 2004 amid the rebranding of NoMa, the district's new hot spot for redevelopment. The collaboration of efforts and both public and private sector funds enabled development in the area to exceed early expectations. The area around the metro is still in the dusk of its existence and promises to offer even greater rewards to the surrounding areas. Over 15,000 new jobs have been created and property values saw a 300% increase 2001 through 2007.



## WITHIN .5 MILES OF THE METRO

### Households:

1990	2,670
2000	2,628
2009	2,750
2014	2,810

### Growth Rate:

1990-2000	-1.57%
2000-2009	4.63%
2009-2014	2.17%

2009 Avg. Income	\$59,017
2009 Median Income	\$43,713
Average HH Size	2.67
2009 Median Age	33.64

2009 Total Businesses	604
Private Sector	438
Public Sector	166
2009 Total Employees	11,010

Total Gross Leasable Retail Area (Sq.Ft.)	147,255
Mixed Uses	75%

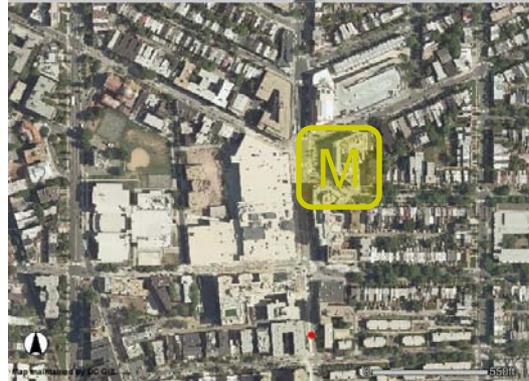
## Metro Ridership

Station	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
New York Avenue	-	-	-	-	-	2,177	2,945	3,489	4,603	5,229

SOURCE: NCPPP, RCLCO, CLARITAS

# COLUMBIA HEIGHTS

Columbia Heights was a challenged neighborhood after the riots of 1968 and did not see a revitalization until 1999 when the metro station opened. The neighborhood has been on a steady upward trajectory since the metro opening. Political will and public-private partnerships aided the pioneering DC USA shopping complex which opened in March of 2008. This retail center is the lynchpin to the success of the community.



## WITHIN .5 MILES OF THE METRO

### Households:

1990	13,080
2000	13,199
2009	13,897
2014	14,271

### Growth Rate:

1990-2000	0.91%
2000-2009	5.29%
2009-2014	2.69%

2009 Avg. Income	\$62,596
2009 Median Income	\$44,332
Average HH Size	2.41
2009 Median Age	32.25

2009 Total Businesses	766
Private Sector	625
Public Sector	142
2009 Total Employees	6,661

Total Gross Leasable Retail Area (Sq.Ft.)	569,358
Mixed Uses	38%

## Metro Ridership

Station	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
Columbia Heights	3,957	4,771	5,346	5,835	6,009	6,596	7,330	8,441	10,168	11,375

SOURCE: CNU, RCLCO, CLARITAS



Next Steps (or, “So Now What?”)

# SUMMARY AND ACTION ITEMS

## TRANSIT CRUCIAL TO ECONOMIC FUTURE

- Regional growth will trend toward transit-oriented development
- Tremendous value in creating these places
- Employers and households are demanding these environments – and they have options
- Creating them is no easy task, critical to the economic future of Prince George's County
- Remember the 3 Ps



# Transit-Oriented Development Framing the Future of Prince George's County

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Prince George's County Economic Forum | June 11, 2010

