



City of Bowie

Memorandum

Thursday, April 21, 2022
Alfred D. Lott, ICMA-CM, CPM,
City Manager

STATUS REPORT

1. Bowie Economic Development Strategy
Attached is the draft of the Bowie Economic Development Strategy & Action Plan. The consulting team – the University of Baltimore Jacob France Institute and Margrave Strategies, will present this draft to the Council at the May 2, 2022 meeting. The draft is also being posted on the City's website this week to allow citizen review prior to the Council meeting.

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Attachment



ECONOMIC DEVELOPMENT STRATEGY & ACTION PLAN

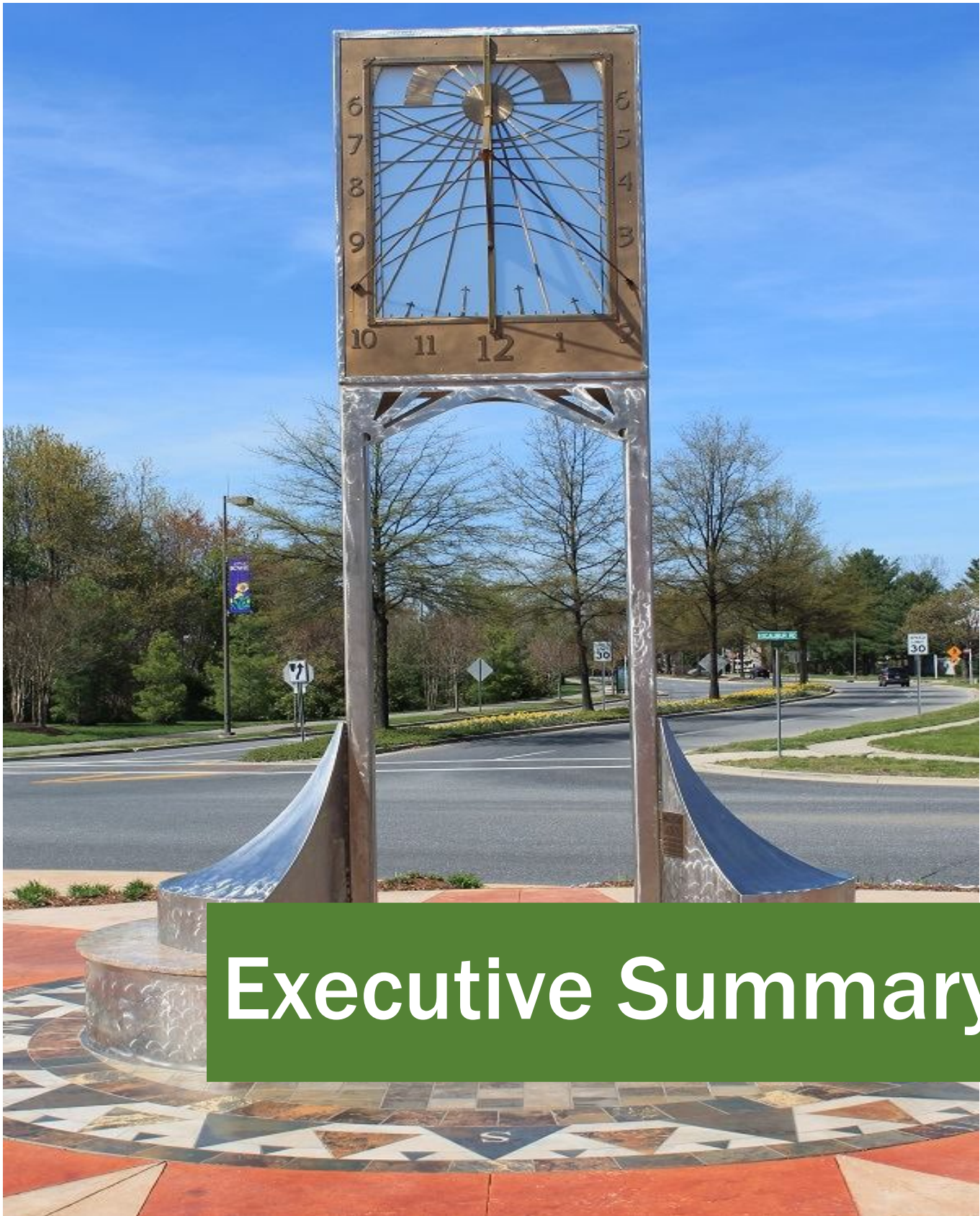
City of Bowie

Prepared by The Jacob France Institute of The University of Baltimore & Margrave Strategies
on behalf of the City of Bowie
Draft April 2022



TABLE OF CONTENTS

Executive Summary	3
Plan Overview & Process.....	6
Existing Conditions Analysis	10
Stakeholder Engagement and Review of Planning Materials	22
SWOT Assessment	27
City Of Bowie Economic Development Strategic Plan.....	31
Appendices	51



Executive Summary

EXECUTIVE SUMMARY

In September 2021, The Jacob France Institute of the University of Baltimore and Margrave Strategies (the JFI-Margrave Team) were awarded a contract by the City of Bowie (the City) to conduct an economic analysis and draft an economic development strategy for the City. The core deliverable of the engagement is the creation of an economic development strategy and action plan – a strategic document that encompasses a variety of goals, actions and implementation strategies to guide sustainable and measurable economic growth within the limits of the City.

This City of Bowie Economic Development Strategic Plan consists of four core sections, divided into the three tasks, as requested in the RFP:

1. **Existing Conditions Analysis (Task 1)** – The JFI-Margrave Team presents a fact-based assessment of the City business and economic trends and economic development assets that impact economic development.
2. **Stakeholder Engagement and Review of Planning Materials (Task 2)** – The JFI-Margrave Team presents the results of its stakeholder interviews, project meetings and City Council Planning Session/Presentation where the JFI-Margrave Team collected valuable business, developer and public information on the goals for and critical issues impacting economic development in the City.
3. **SWOT Assessment (Task 2 Continued)** – The JFI-Margrave Team integrates the findings of the *quantitative* (Existing Conditions Analysis) and *qualitative* (Stakeholder Engagement) assessment into an assessment of the Strengths, Weaknesses, Opportunities, and Threats (SWOT) impacting economic development in the City.
4. **The City of Bowie Economic Development Strategic Plan (Task 3)** – Consisting of Strategic Areas of Focus, Recommended Actions, and the Implementation Matrix to guide the City in attaining its economic development goals.

Through the completion of Tasks 1 & 2, four Strategic Areas of Focus emerged. Areas of Focus are the foundation stones of the strategy. They expand on the vision and start to create some structure to help the City to achieve its goals. Strategic Areas of Focus for the City of Bowie Economic Development Strategic Plan are:

1. **Utilize creative placemaking to support economic development, with an initial focus on Bowie Town Center.**
2. **Leverage Bowie State University as the City of Bowie's most natural anchor institution.**
3. **Distinguish the City as an athletic recreation tourism hub.**
4. **Expand the City's business base through targeted business startup, expansion and retention efforts.**

In addition to the Strategic Areas of Focus, the JFI-Margrave Team developed twelve Recommended Actions. Recommended Actions are a series of suggested items the JFI-Margrave Team believe should be implemented for the City to reach its economic development goals. A summary of the Strategic Areas of Focus and Recommended Actions in this strategy is on the following page.

The JFI-Margrave Team believes the findings and recommendations outlined in the Strategic Plan will provide the City with a roadmap to continued economic success and further its goal of becoming a premier destination for sustainable living and working in the Washington DC region.

Strategic Area of Focus	Recommended Action	Strategic Area of Focus	Recommended Action
1 UTILIZE CREATIVE PLACEMAKING TO SUPPORT ECONOMIC DEVELOPMENT WITH AN INITIAL FOCUS ON BOWIE TOWN CENTER	1.) ACTIVELY MARKET AND SUPPORT RETAIL SPACE AND ENCOURAGE HIGH QUALITY DEVELOPMENT	2 LEVERAGE BOWIE STATE UNIVERSITY AS THE CITY OF BOWIE'S MOST NATURAL ANCHOR INSTITUTION.	7.) CONTINUE TO SUPPORT THE BOWIE BUSINESS INNOVATION CENTER AND DEVELOP INCENTIVES FOR ITS GRADUATES TO PERMANENTLY LOCATE IN BOWIE.
	2.) CONTINUE TO SUPPORT MIXED-USE DEVELOPMENT IN KEY AREAS OF THE CITY AS A TOOL TO ENCOURAGE PLACEMAKING, VIBRANCY AND WELL-PLANNED DENSITY.		8.) DEVELOP A 'LIVE WHERE YOU WORK' PROGRAM.
	3.) CREATE A RETAIL ATTRACTION FUND	3 DISTINGUISH THE CITY OF BOWIE AS AN ATHLETIC RECREATION TOURISM HUB.	9.) MARKET THE CITY AS AN ATHLETIC RECREATION TOURISM HUB
	4.) IMPLEMENT A COMMERCIAL FAÇADE IMPROVEMENT PROGRAM		10.) WORK TO REDEVELOP THE BOWIE RACE TRACK PROPERTY INTO A REGIONAL RECREATION DESTINATION.
	5.) WORK WITH COUNTY OFFICIALS TO STREAMLINE PROCESSES FOR PERMITS, INSPECTIONS AND ENFORCEMENT	4 EXPAND THE CITY'S BUSINESS BASE THROUGH TARGETED BUSINESS STARTUP, EXPANSION AND RETENTION EFFORTS	11.) CREATE AND IMPLEMENT A TARGETED MARKETING CAMPAIGN TO ATTRACT THE INFORMATION TECHNOLOGY, GOVERNMENT CONTRACTING, HEALTH SERVICES AND DESTINATION RETAIL SECTORS
	6.) COMPLETE AN ASSESSMENT OF PROPERTY IN OLD TOWN BOWIE AND CREATE AN AREA DESIGNATED FOR SMALL AND LOCAL BUSINESSES		12.) ENHANCE AND INCREASE PROMOTION OF THE CITY'S EXISTING ECONOMIC DEVELOPMENT TOOLS AND PROGRAMS.



Plan Overview & Process

PLAN OVERVIEW & PROCESS

INTRODUCTION

The City of Bowie (“the City”) has a longstanding reputation as one of the preeminent and most desirable communities in Prince George’s County. In an effort to continue to strengthen itself and ensure competitiveness with its peers, the City issued a Request for Proposals (RFP) in March 2021 for a consultant to deliver an economic development strategy and action plan. The joint team of the Jacob France Institute of Baltimore and Margrave Strategies (“the JFI-Margrave Team”) successfully competed for the project and were awarded the contract in late September 2021. Work on the engagement began in October 2021. The goals of the strategy and action plan, as listed in the RFP, are below:

“The City wants to increase the number of non-residential taxpayers and the revenues they create to ultimately reduce the residential taxpayers’ burden. It wants to have increased revenues to pay for government services without asking the residential taxpayer to carry the full burden, so it needs to grow the number and types of businesses in Bowie. The City will accomplish this by changing and improving the mix of businesses; revitalizing areas of the City tarnished by age; and preventing disinvestments and the erosion of the business base. The City also wants to maintain and enhance a high quality of life. It wants to bring shopping and working choices to its citizens, improve the quality of life, make the City an attractive place for future generations, and protect the things that make the City what it is.”

The JFI-Margrave Team’s approach to assisting jurisdictions in economic development planning is based on three core approaches. Our approach is **fact-based** and identifies, presents, and clearly describes both the relevance and role of demographic, economic, real estate, and socio-economic conditions in the development process. Our approach is also **stakeholder driven**. Economic development planning cannot be conducted in a vacuum; it must be built up from the detailed local knowledge of, experience with, and goals for the development process. Most importantly, our approach is to provide plans that are **actionable and achievable** and are responsive to real local strengths and needs and can be quickly turned into implementation decisions that enable the client to quickly move forward.

This document presents the JFI-Margrave Team’s recommended economic development strategy and action plan for the City.

PLAN ELEMENTS

This Economic Development Strategy and Action Plan consists of the following sections:

- **Executive Summary** – a high level summary of the findings of this document.
- **Plan Overview & Process** – elements of the plan, instructions for how to use this document and a summary of the process of developing the strategy.
- **Existing Conditions Analysis** – an analysis of current trends and findings in the City based on the quantitative analysis performed in Task 1 of the contract.

- **Stakeholder Engagement & Review of Planning Materials** – a qualitative assessment of the City to supplement and fact check the findings of Task 1. Task 2, the Stakeholder Engagement Analysis, utilized two means of soliciting feedback from major stakeholders: one on one or small group interviews and an online survey.
- **SWOT Assessment** – an analysis of the strengths, weaknesses, opportunities and threats of the City based on the qualitative analysis performed in Task 2 of the contract.
- **Strategic Plan** – the JFI-Margrave Team’s major recommendations, consisting of:
 - **Strategic Areas of Focus & Recommended Actions**– areas of focus are larger and broader strategies that several recommended actions can feed into, focusing the impact of the actions. The Recommended Actions support the Strategic Areas of Focus and should spur continued economic development in the City.
 - **Implementation Matrix** – need to know information on how to implement the recommended actions.

HOW TO USE THE PLAN

The bulk of this document consists of the City’s Economic Development Strategic Plan. The Plan is divided into two sections: Strategic Areas of Focus & Recommended Actions and an Implementation Matrix. The “Strategic Areas of Focus” are four areas in which the JFI-Margrave Team foresees the greatest economic development impact when several recommended actions are implemented in the concentrated area. The “Recommended Actions” section lists each of the individual actions the JFI-Margrave Team is recommending the City carry out. Each action is listed with a brief description of the action and/or how it can be achieved, along with the rationale for the action item that outlines why the action is being suggested.

The “Implementation Matrix” section of this document consists of tables providing practical guidance on how to implement each action. The matrix contains the following information:

- Strategic Area of Focus
- Recommended Action
- Leader/Implementer
- Budget Impact
- Potential Partners
- Timeframe (short-term, mid-term, long-term)
- Key Goals of RFP
- Notes

A quick checklist of the implementation matrix can assess how much progress the City has accomplished on each of these recommended actions over a given period of time by denoting which actions are completed, are in progress, or have not yet begun. Additionally, the timeframe noted on the implementation matrix can be used when planning budgets, staff work plans and setting legislative priorities. This implementation matrix could be used to create a public facing dashboard should the City choose to track progress.

PROCESS

The engagement between the City and the JFI-Margrave team took place over the course of seven months and was divided into three core “tasks.”



Task 1: Existing Conditions Analysis

This quantitative analysis involved an assessment of the City’s existing business and economic trends, as well as economic development assets. Throughout this task the JFI-Margrave Team assessed the size, structure and performance of the City’s economy and business base; analyzed current, historical and future demographics and economic statistics; assessed the City’s retail capacity and services; assessed the inventory of available commercial space; analyzed the composition of the City’s business base and identified key clusters; and looked at county, state and regional projects to identify opportunities for cross organizational collaboration. The deliverable for this task was a presentation to the City leadership team.



Task 2: Stakeholder Engagement Analysis

Based on the findings of the quantitative analysis in Task 1, Task 2 focused on qualitative assessment of the City based on feedback from key stakeholders. In all, the JFI-Margrave Team conducted 20 interviews with stakeholders in the following stakeholder groups: City staff and elected officials, Prince George’s County staff and elected officials, developers of major projects, business owners/leaders and leadership from several nonprofit organizations within the City. These interviews took place between November 2021- January 2022.

In addition to the one-on-one stakeholder interviews, the JFI-Margrave Team also solicited feedback from the general public through utilization of an online digital survey. This survey asked the same questions posed to stakeholders in the one-on-one interviews, such as perceptions of key issues in the City, suggestions/ideas for the City’s economic development strategy and opinions on a variety of economic development related topics. 67 individuals participated in the online survey.

The results of Task 1 and Task 2 was the creation of a strengths, weaknesses, opportunities and threats (SWOT) analysis, which can be found on page 28. The findings of the SWOT analysis were shared with the City Council on January 18, 2022.



Task 3: Economic Development Strategy and Action Plan Development

The final task within the contract was to combine the findings of the Existing Conditions Analysis and Stakeholder Engagement Analysis into a holistic, comprehensive strategy for the City. This took place between January – March 2022. This plan advises on a series of four areas of focus and twelve recommended actions, policies and programs to achieve the City’s economic development goals over the next 5 years. This strategy was presented to the City Council on [date].



Existing Conditions Analysis

EXISTING CONDITIONS ANALYSIS

In Task 1 the JFI-Margrave Team conducted a quantitative assessment of key issues impacting economic development in the City in five core areas. The five core areas of this analysis are below:

1. Size, Structure and Performance of the City's Economy
2. Composition Of the City's Business Base
3. Current, Historical and Future Demographic and Economic Statistics
4. City of Bowie Retail Capacity
5. Inventory of Commercial Space Available

Throughout this analysis are terms that have specific economic development definitions – the glossary in Appendix 2 provides definitions for these phrases, many of which refer to specific industries or sectors.

SIZE, STRUCTURE AND PERFORMANCE OF THE CITY'S ECONOMY

The City is the largest municipality in Prince George's County in terms of population and second largest in terms of employment. The City is experiencing slow and stable population growth, but lags key peers in both employment concentration and growth. The City's economy is concentrated in businesses serving the local population base, but also has a cluster of professional services activities. A core City economic development asset is its resident workforce, many of whom commute to jobs outside of the City, County and State. Capitalizing on this workforce, as well as the City's prime location and infrastructure, to expand the City's business base is a core economic development opportunity. The JFI-Margrave Team assessed the size structure and performance of the City's business base. The key results of this analysis are presented below.

Finding: The City's economy is growing, but is lagging the County in employment growth and has a smaller employment base than key peers.

The City has a smaller number of jobs per resident than all selected peers except Crofton (Figure 1). Between 2013 and 2019,¹ the City's employment base increased by 4%, lagging the County (9.4%), but stronger than several selected peers (Table 1). Nationally and regionally communities offering a denser, more urban, mixed-use environment that offer a "sense of place" around an urban center have experienced stronger growth in population and jobs.



SENSE OF PLACE

Sense of place describes the individuality of place, its distinct character, and it also suggests a particular feel that makes the place stand out among other areas. Thus, this concept is strongly tied to the process of placemaking through which social, cultural or ethnic groups shape their environment and landscape.

¹ The latest employment data at the sub-County level is 2019.

Insight: Communities with a stronger “sense of place” and higher residential densities, notably Annapolis and Hyattsville, have outperformed the City in terms of employment growth.

Figure 1: Jobs Per Resident, City of Bowie Compared to Selected Peers

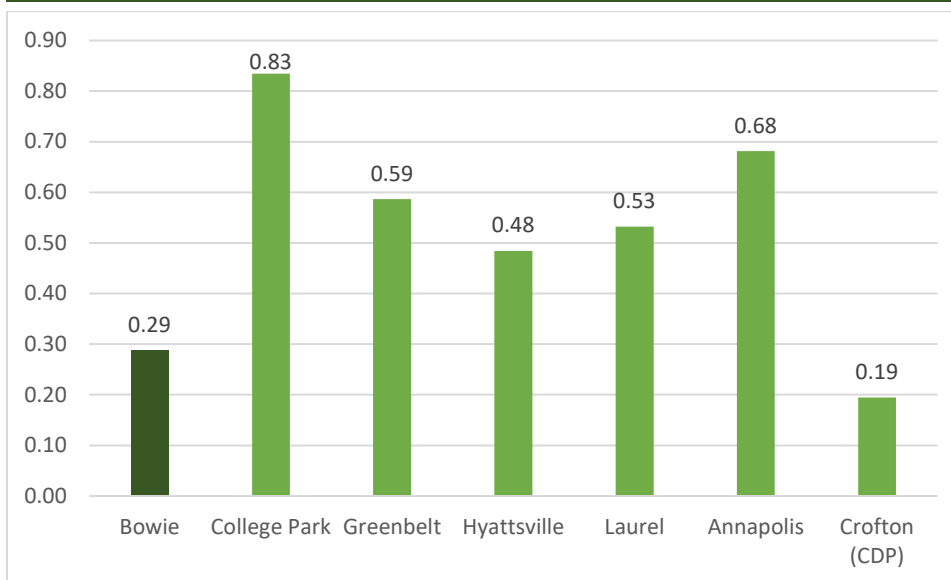


Table 1: Total Employment, All Industries City of Bowie and Peer Municipalities/Places, 2013 -2019

Area	2013	2019	Change 2013-2019	
			#	%
Maryland	2,487,281	2,634,322	147,041	5.9%
Prince George's County	304,484	333,163	28,679	9.4%
Bowie	16,124	16,776	652	4.0%
College Park	28,923	26,828	(2,095)	-7.2%
Greenbelt	13,683	13,617	(66)	-0.5%
Hyattsville	7,802	8,835	1,033	13.2%
Laurel	12,893	13,714	821	6.4%
Annapolis	25,568	26,728	1,160	4.5%
Crofton (CDP)	5,039	5,663	624	12.4%

Source: U.S. Census Bureau. OnTheMap Application. Longitudinal-Employer Household Dynamics Program

COMPOSITION OF THE CITY'S BUSINESS BASE

Finding: *The City's economy is highly concentrated and specialized with industries that serve the city and regional population.*

More than half (53%) of City's employment is in *Residential Demand-Based* sectors that primarily serve the local and regional community, including Retail (20%), Health Care and Social Assistance (14%), Arts, Entertainment, and Recreation (7%) and Accommodation and Food Services (13%). Only 14% of employment is in *Export-Based Industries*, or industries that compete in the broader regional, national or even international markets, most importantly Professional Services (10%) and Information (4%). However, the City has seen strong growth between 2013 and 2019 in Professional Services, gaining 594 jobs and growing by 57% (Table 2). The City has experienced a decline in key residential demand-based sector employment, with Retail jobs declining by 10%, and smaller declines in Arts, Entertainment, and Recreation (fell by 3%) and Accommodation and Food Services (fell by 5%). These declines were more than offset by strong growth (788 jobs/52%) in Health Care and Social Assistance sector employment. Based on the industry specialization analysis conducted using location quotients (see side note), the City's economy is specialized in residential demand-based industries like Arts and Entertainment and Retail, but also has a high concentration of employment in Information and Professional, Scientific, and Technical Services (See Appendix Table 1 for data and Appendix 2, Glossary, for the definitions of industries used here and throughout this report).

Insight: *Expanding the City's employment base is a core goal of this proposed strategy and the City may have the potential to attract more Professional, Scientific, and Technical Services Sector jobs in the County's strong Federal contractor sector, as well as serve as a regional center for Health Care and Social Assistance employment, by supporting more traditional office space development.*



LOCATION QUOTIENTS

Location quotients are ratios that allow an area's distribution of employment by industry, ownership, and size class to be compared to a reference area's distribution. If an LQ is equal to 1, then the industry has the same share of its area employment as it does in the nation. An LQ greater than 1 indicates an industry with a greater share of the local area employment than is the case nationwide.

Table 2: City of Bowie Employment Trends by Sector, 2013-19

Area	2013	2019	Change 2013-2019	
			#	%
Total	16,124	16,776	652	4%
Agriculture, Forestry, Fishing and Hunting	0	0	0	n.m.
Mining, Quarrying, and Oil and Gas Extraction	0	0	0	n.m.
Utilities	5	4	(1)	-20%
Construction	922	1,133	211	23%
Manufacturing	204	65	(139)	-68%
Wholesale Trade	244	167	(77)	-32%
Retail Trade	3,672	3,320	(352)	-10%
Transportation and Warehousing	106	105	(1)	-1%
Information	1,097	671	(426)	-39%
Finance and Insurance	517	467	(50)	-10%
Real Estate and Rental and Leasing	205	73	(132)	-64%
Professional, Scientific, and Technical Services	1,043	1,637	594	57%
Management of Companies and Enterprises	2	1	(1)	-50%
Administration & Support, Waste Management and Remediation	576	1,045	469	81%
Educational Services	1,634	1,496	(138)	-8%
Health Care and Social Assistance	1,506	2,294	788	52%
Arts, Entertainment, and Recreation	1,146	1,115	(31)	-3%
Accommodation and Food Services	2,311	2,188	(123)	-5%
Other Services (excluding Public Administration)	411	479	68	17%
Public Administration	523	516	(7)	-1%

Source: U.S. Census Bureau. OnTheMap Application. Longitudinal-Employer Household Dynamics Program

Finding: City employment is highly concentrated in large employers, but has a wealth of small and mid-size businesses.

Based on an analysis of data from the City employer database, as well as commercial databases (Hoover's), the JFI-Margrave Team assessed the level of employment in key large employer (50 or more) employers (Appendix Table 2). These larger employers have estimated employment of 11,810 jobs with employment concentrated in key resident-demand-based industries Retail Trade (22% of these jobs), Accommodation and Food Services (12%) and Education (mostly public schools – 11%) and Health Care and Social Assistance (10%). The City is home to 11 large employers with 1,991 jobs (17% of the total for larger employers) in the Professional, Scientific, and Technical Services and Information sector. In order to assess the overall number of businesses in the City and the overall 8 Zip Code level Broader Bowie area,² the JFI-Margrave Team analyzed data on the overall number of businesses in the larger greater Bowie area (Figure 2). This larger area was home to 1,627 business establishments with 25,182 employees, with a large concentration of smaller establishments (70%) of these establishments having less than 10 employees.

Insight: While large employers account for a large share of employment, the City's economic development strategy will also need to serve the needs of the large number of smaller businesses in the City.

² Data on establishment count by firm size are only available from the U.S. Bureau of Census Zip Code Business Patterns report for the larger 8 zip codes classified as Bowie, 20715 20716 20717 20718 20719 20720 20721, are an area larger than the City of Bowie alone. - with 20720 and 20721 especially including areas outside of the City boundaries.

Finding: Prince George's County has a large base of federal contractors (3,998) with \$10 billion in federal contract value in federal fiscal year 2021. However, there are only a limited base of federal contractors located in the City.

There are only 96 companies, with \$70.2 Million federal contracts, in the City, far below all County peers except Laurel (Table 3). Prince George's County has the second highest number of federal contractors and procurement in Maryland, and has targeted increasing federal employment and contracting as part of its economic development strategy.

Insight: Attracting federal contractors to the city is a potential market for both office and flex space uses. For example, in terms of NASA contractors, Greenbelt is home to 97 companies with NASA contracts. While Greenbelt is closer to NASA Goddard; with the City's strong technical workforce and locational assets, it may be able to attract some of these contractors. Data on NSA contractors are not public, but Prince George's County and neighboring Anne Arundel and Howard Counties are home to a large amount of cybersecurity companies and NSA contractors, presenting another potential market for the City.

Table 3: Federal Procurement, FY2021				
Area	Amount	% of County	# of Contractors	% of County
Prince George's County	<u>\$9,954,102,863</u>		<u>3,998</u>	
Bowie	\$70,279,118	1%	96	2%
College Park	\$268,325,426	3%	379	9%
Greenbelt	\$999,502,133	10%	220	6%
Hyattsville	\$231,233,981	2%	398	10%
Laurel	\$49,974,156	1%	254	6%
Annapolis	\$494,031,229	n.m.	456	n.m.
Crofton (CDP)	\$49,319,730	n.m.	51	n.m.

Source: SAM.GOV

Finding: With only 0.29 jobs per resident (Figure 1), among the lowest of peer municipalities, the City has the potential to expand its employment base.

The City is already specialized in the Information, Retail, and Professional, Scientific, and Technical Services industries (Appendix Table 1), the City has the potential to support growth in other key employment sectors. The soon to be released Prince George's County economic development strategy identifies four target and two supporting industry clusters that are driving the County's economy (see Appendix 2 for a definition of these clusters). These are:

Target Clusters

- Federal Government
- Hospitals and Health Services
- Information Technology Services
- Research – Intensive Industries

Supportive Economic Drivers

- Destination Retail
- Transportation, Distribution and Logistics

Insight: The City can capitalize on the County's efforts to focus on the four targets and two supporting industry clusters especially in the: Information Technology Services cluster, where the City is already home to companies such as Inovalon; Hospitals and Health Services cluster, with the City experiencing strong growth in health care services employment; and the Destination Retail cluster, with the City having a high concentration of retail employment.

CURRENT, HISTORICAL AND FUTURE DEMOGRAPHIC AND ECONOMIC STATISTICS

The City is home to a growing, affluent, educated and largely professional population that commutes to employment opportunities across the region. The City has a high level of household income, a high concentration of educated and professional workers, and is home to a large base of federal workers.

Population Change

Finding: The City's population is growing and aging.

The City's population is estimated to have increased by 6.9% and the number of households by 5.2% between 2010 and 2019.³ The fastest population growth occurred in residents 60 and older, but the City also gained Millennial residents (aged 25-34) – (Appendix Tables 3-4-5).

Insight: With an aging population, changes in land-use to permit a denser style of mixed-use development favored by younger population is one means of attracting younger residents.

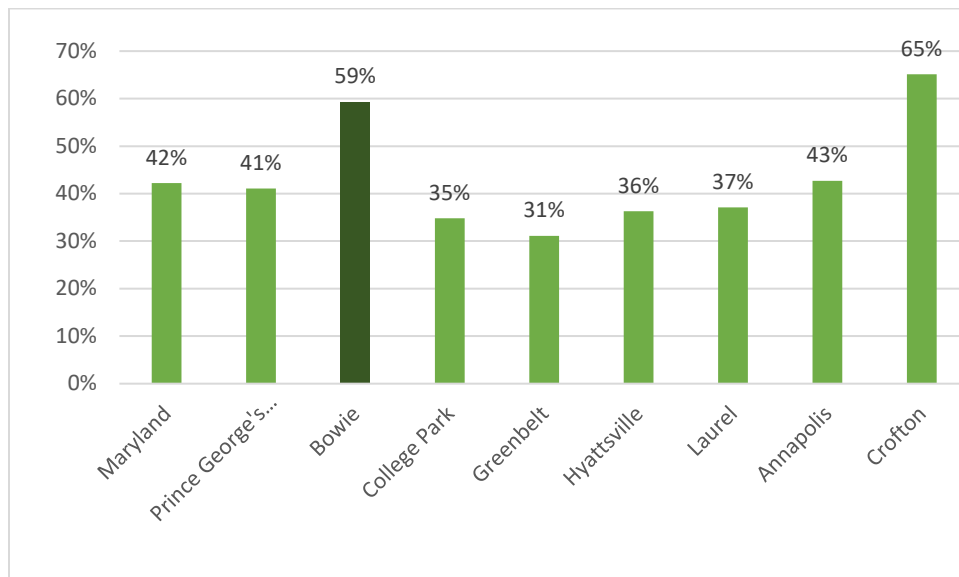
Income and Poverty

Finding: The City has an affluent population.

With an estimated 2019 (5-year estimate) Median Household Income of \$113,388 and a poverty rate of 3.2%, the City's population is more affluent than the State or County and all but Crofton in terms of peer municipalities (Appendix Tables 6-7). More than 59% of the City's households earn more than \$100,000 (Figure 2).

Insight: With low poverty and high incomes, the City has the potential to support the higher quality retail desired by its residents. Such an effort may require a stronger retail marketing effort by the City.

Figure 2: Percentage of Households Earning More than \$100,000



³ Data is ACS 5-Year estimates. Recently released 2020 Census data show the City gaining fewer residents through 2020 and lagging several key peers. The 2019 ACS data were retained for this report since they form the basis for the demographic analysis below.

RESIDENT WORKFORCE CHARACTERISTICS

Finding: The City has significant workforce assets.

One of the most significant economic development assets for the City is its strong resident workforce.

The City has:

- Labor force:** The City has a higher than national, State and County level of labor force participation but is slightly lower than key municipal peers, which is consistent with its aging population (Figure 3).
- Highly educated workforce:** A highly educated workforce, with 48% of resident workers having a Bachelor's degree or above and 23% having an advanced degree, higher than the nation, State and County and all but two municipal peers, Crofton and College Park (Figure 4).
- Strong federal workforce:** With 18% of resident workers employed by the federal government (Figure 5). A strong federal workforce is considered an asset because federal employment tends to offer higher wages and job stability.
- Strong professional workforce:** With 55% of resident workers employed in Management, business, science, and arts occupations, higher than the nation, State, County and all municipal peers except Crofton (Figure 6).

Insight: The City should capitalize on its affluent, educated and professional resident workforce in its marketing efforts.

Figure 3: Labor Force Participation

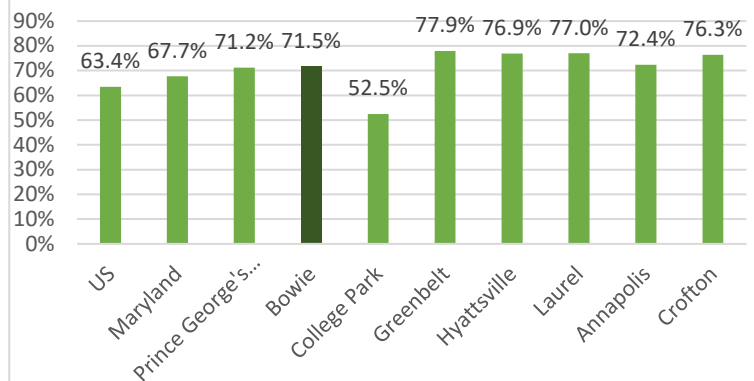
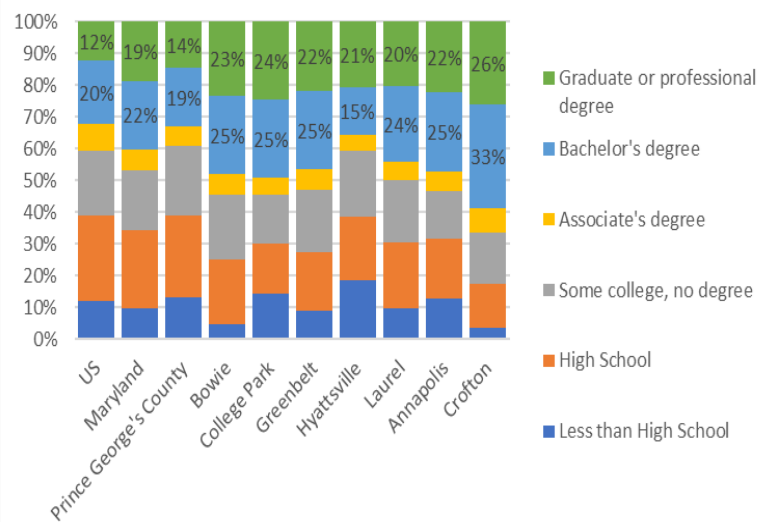


Figure 4: Educational Attainment



Finding: The City remains a suburban bedroom community.

The City is predominantly a suburban bedroom community with only 0.29 jobs per resident (Figure 1). As a result, local employment options for resident workers are limited. While 14% of City resident workers work in the City, higher than the County average for resident workers employed in their place of residence but lower than the State average, 55% of residents commute to jobs outside of the County or State (Appendix Table 8) representing an important potential source of workers to targeted City employers.

Insight: The City's highly educated and professional workers that commute outside of the City are a potential key asset to support the attraction of employers, especially in the Professional, Scientific, and Technical Services sector.

Figure 5: Percent of Workforce Employed by the Federal Government

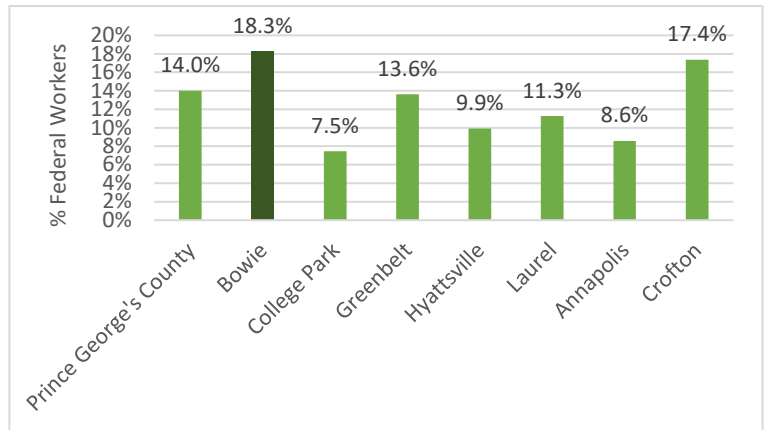
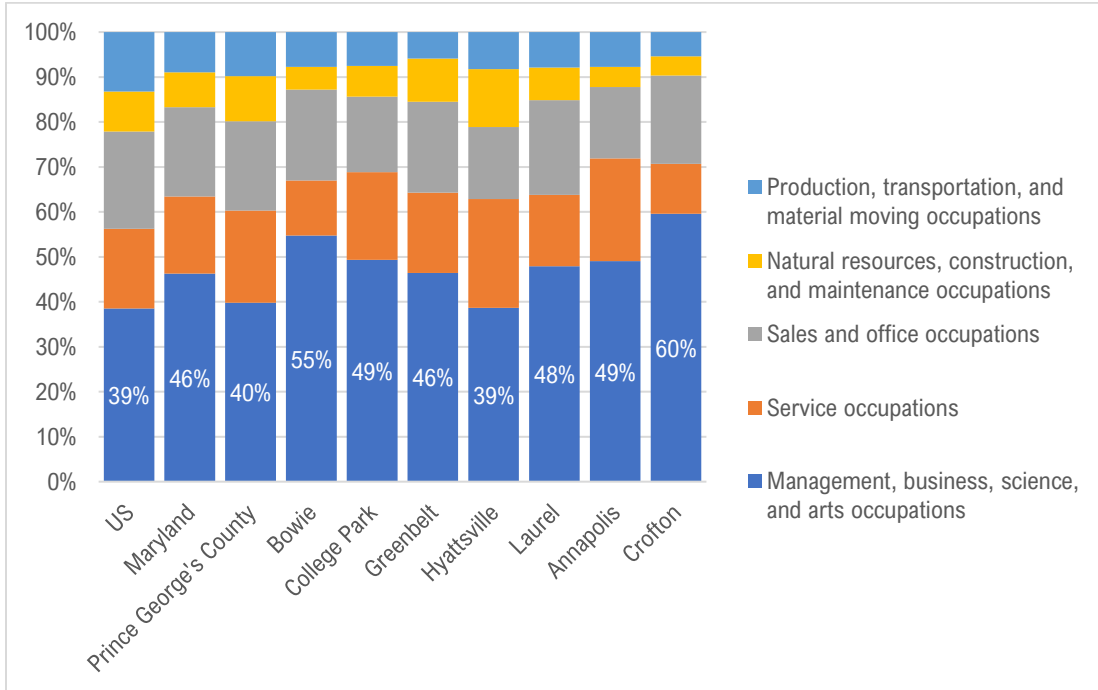


Figure 6: Occupational Employment



CITY OF BOWIE RETAIL CAPACITY

Finding: A key issue identified in the stakeholder interviews, meetings and presentations is the desire to have higher quality retail commensurate with the City's higher than average median household income.

While vacancy in the City's retail centers remains low (6.3%), there is a general concern among the stakeholders interviewed that the City has lost retail opportunities to surrounding communities, notably in new larger developments, and that the City's retail base does not offer the quality of shopping options demanded by the City's affluent population. Additionally, the City's residents and workforce feel that they could support higher quality retail. In order to assess the retail situation in the City, the JFI-Margrave Team conducted site visits to the City's key retail and employment centers, analyzed historical changes in City retail employment, and analyzed data on retail leakages using ESRI data. Based on this assessment, findings are:

- **Low vacancy:** the City's retail centers appear to have relatively low vacancy, which is a positive condition considering the impacts of the recent Covid pandemic on retail across the nation, State and County.
- **Consistent retailers with other shopping centers:** The retail tenants appear to be consistent with similar suburban shopping regions, albeit with a higher concentration of chain tenants.
- **Retail employment moved with new development:** Between 2013 and 2019, retail employment in the City fell by 10%; while retail employment in Crofton grew by 17% and at the County-level by 2%.
- **Retail Leakage:** Based on the most recent ESRI data on City retail markets, the City has overall retail leakage (demand less supply) of \$223 million. This consists of \$196 million in retail sales leakages and \$28 million in food and drink services, with the main areas of surplus being department stores and automobile dealers.



RETAIL LEAKAGE

Retail leakage occurs when local people spend a larger amount of money on goods than local businesses report in sales, usually due to people traveling to a neighboring town to buy goods. Retail sales leakage implies there is unsatisfied demand within the trading area

Insight: In the emerging post-Covid environment, the future of retail remains uncertain; however, County and City, efforts to improve both the provision and quality of City retail opportunities appears to be warranted.

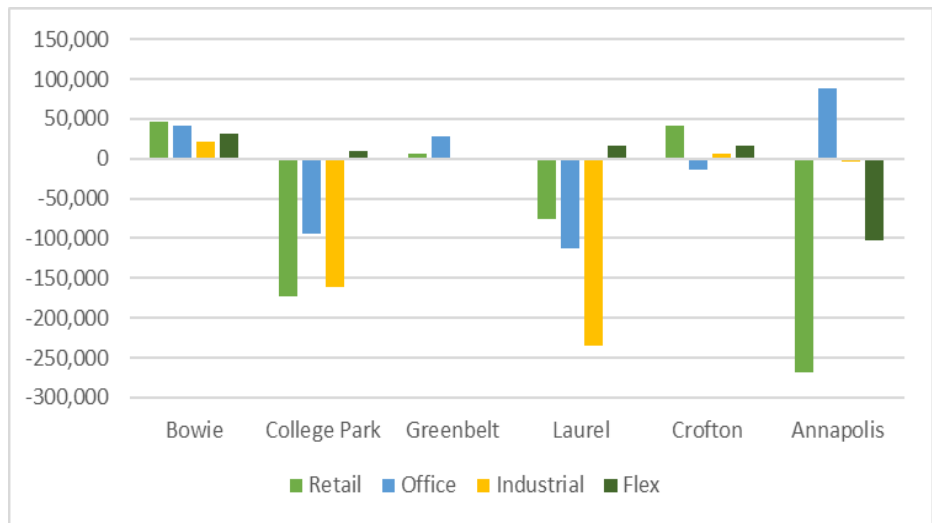
INVENTORY OF COMMERCIAL SPACE AVAILABLE

Finding: *The City has sufficient commercial space to meet its current needs, with its vacancy rates generally low and competitive costs. However, the City lags key comparison areas in terms of its supply of commercial/employment space.*

The JFI-Margrave Team analyzed CoStar data for the City and peer area commercial real estate to assess the alignment of existing space to current needs and emerging economic development goals.⁴ Key findings of our commercial space analysis are presented in Table 4 and include:

- Consistent with the City's smaller employment base (Figure 1), despite being the County's largest municipality in terms of population, the City lags smaller jurisdictions in commercial space.
- The City lags all but one peer jurisdiction (Greenbelt) in Retail Space, with 3.2 million square feet of retail space; however, when retail parcels in the surrounding Bowie area are included, the City has 5.8 million square feet, behind only College Park 7.7 million square feet and Annapolis 7.4 million square feet.
- The City is ranked 5th in terms of Office Space – ahead of only Crofton, with Office Space in the surrounding Bowie area are included, the City and surrounding area lag peer communities in the amount of available Office Space.
- While there is limited industrial space inside of the City, there is substantial industrial space more than 5 million square feet. In the CoStar defined Bowie area (2nd among peer jurisdictions).
- The City is ranked fourth among peer jurisdictions in terms of Flex Space within the City limits.
- Vacancy rates and costs among the four commercial space classes analyzed are competitive to peer jurisdictions. In terms of costs, anecdotally, because much of the space in the City is newer than in the surrounding area, it is considered even more competitive.

Figure 7: Absorption by Real Estate Class in Bowie and Surrounding Areas



⁴ Data for the City of Bowie are from an analysis prepared by the City's Economic Development Department on City specific, rather than the broader Bowie trading area included in the CoStar database – which includes some parcels outside of the City's boundaries but are considered part of the City's trading area, except for Figure 8 on absorption, which includes these surrounding properties. While providing a strong focus on the City's commercial inventory, the comparison to other areas may include some parcels outside of the municipal boundaries of those comparison areas. Because the JFI-Margrave Team does not consider the supply or cost of commercial space to be a material barrier to the City's strategy, this difference in geographic focus does not impact our findings.

- Recent patterns of commercial space absorption (the difference between space vacated and newly occupied) have been positive in the City/larger Bowie area, while several peer jurisdictions experienced reduced demand for commercial space and resulting increases in vacancy (Figure 7).

Insight: In order to expand its job base, the City needs to support the development commercial space.

Table 4: Commercial Real Estate Conditions in Bowie and Surrounding Areas						
Real Estate Class	Bowie	College Park	Greenbelt	Laurel	Crofton	Annapolis
<u>Inventory of Retail, Industrial and Office Space (in square feet)</u>						
Retail	3,216,223	7,676,654	1,831,703	3,641,335	3,810,104	7,367,656
Office	1,745,306	4,835,493	3,715,418	3,248,310	1,541,370	7,733,368
Industrial	227,823	8,355,065	348,537	4,198,962	2,704,145	2,555,764
Flex	524,513	453,413	175,866	1,186,875	2,123,681	1,572,129
<u>Vacancy Rates</u>						
Retail	6.30%	6.10%	3.60%	5.60%	2.60%	10.40%
Office	11.70%	7.90%	21.40%	12.00%	13.50%	7.00%
Industrial	1.50%	7.00%	0.00%	7.40%	9.10%	8.30%
Flex	16.90%	11.30%	0.00%	2.70%	11.30%	12.80%
<u>Average Rent</u>						
Retail	\$33.00	\$20.26	\$26.50	\$23.72	\$27.01	\$27.41
Office	\$25.96	\$25.21	\$21.46	\$22.14	\$23.08	\$29.07
Industrial	no data	\$8.83	no data	\$9.57	\$12.22	\$16.95
Flex	no data	\$10.86	no data	no data	\$13.79	\$14.30



STAKEHOLDER ENGAGEMENT & REVIEW OF PLANNING MATERIALS

STAKEHOLDER ENGAGEMENT

A qualitative assessment of the City was conducted to supplement and fact check the findings of Task 1. Task 2, the Stakeholder Engagement Analysis, utilized two means of soliciting feedback from major stakeholders: one on one or small group interviews and an online survey.

The group of stakeholders interviewed was identified through consultations with City staff. Ultimately, invitations to participate in a one on one or small group interview were sent to 37 individuals representing the following stakeholder groups:

- Elected Officials – City of Bowie, Prince George’s County and the State of Maryland
- Appointed Officials – City of Bowie and Prince George’s County
- Developers – Developers of four major projects in the City
- Anchors – Major employers and destinations in/nearby Bowie
- Business Organizations – Largely nonprofits focused on business growth/incubation
- City Advisory Committees – Economic Development Committee, Advisory Planning Board

The JFI-Margrave Team met virtually with 20 different stakeholder groups. Each stakeholder group was asked a series of questions circulated in advance of the meeting. Though the questions asked to each stakeholder were personalized to that group, the questions asked typically included the following:

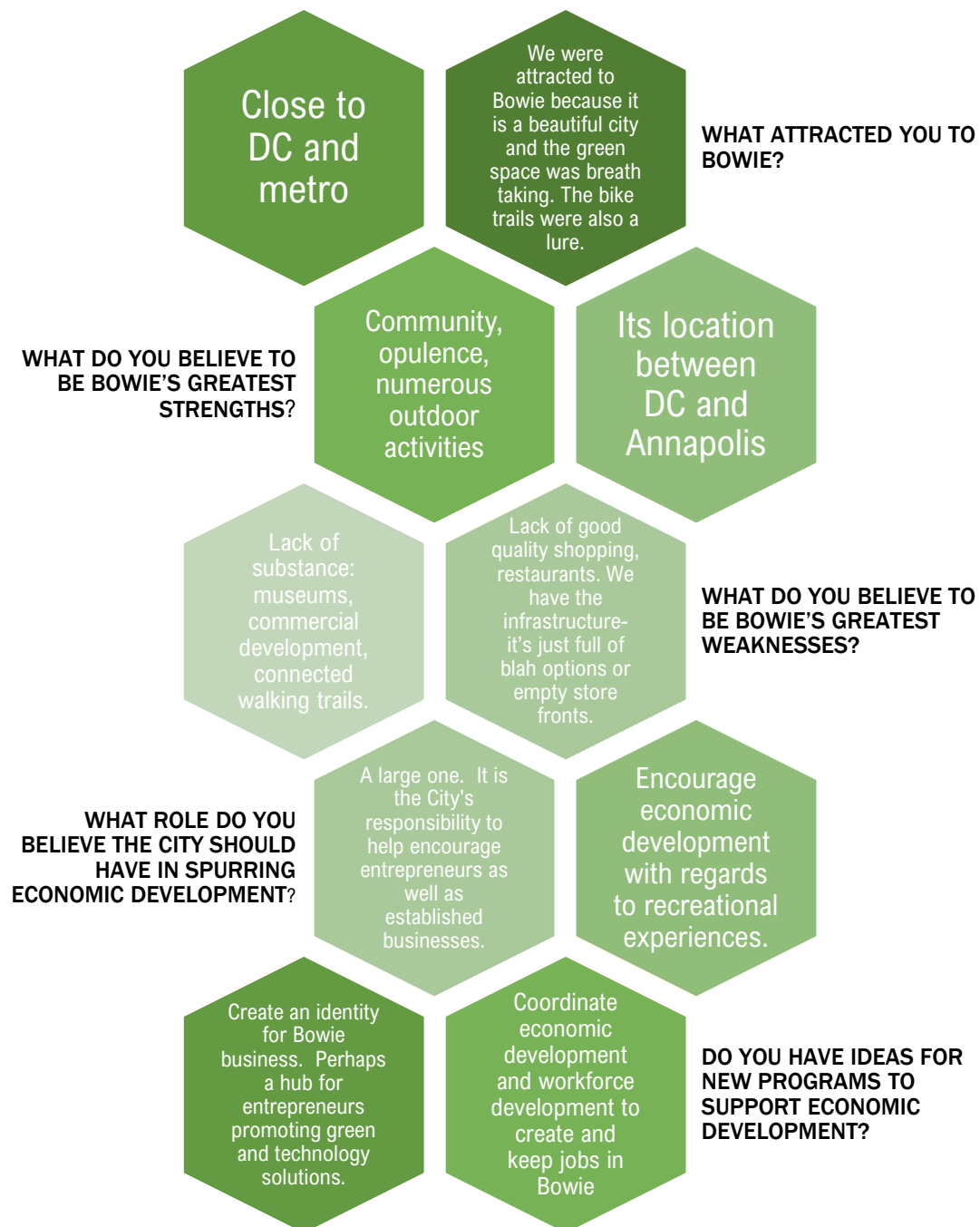
- What attracted you to Bowie?
- What do you believe to be Bowie’s greatest strengths?
- What do you believe to be Bowie’s weaknesses?
- In what ways do you feel supported by the City of Bowie?
- Are there areas of support you wish you had from the City of Bowie?
- What role do you believe the City should have in spurring economic development?
- Is the City doing enough to spur economic development? Is the City doing too much?
- What existing programs are you aware of that support economic development?
- Do you have ideas for new programs to support economic development?
- What is your largest priority from an economic development perspective?
- Where does the City of Bowie fall into [enter organization]’s broader economic development strategy?
- How can the City support [the organization]’s goals?
- Please describe your business/organization.

In addition to the stakeholder interviews, an online survey was made available to the general public of Bowie. John Henry King, City's Economic Development Director, posted the survey on January 1, 2022, and closed it on January 31, 2022, allowing for 31 days for residents of the City to give their feedback. In total, the survey received 67 responses. The online survey asked many of the same questions as were asked in the individual stakeholder interviews, such as:

- What attracted you to Bowie?
- What do you believe to be Bowie's greatest strengths?
- What do you believe to be Bowie's greatest weaknesses?
- What role do you believe the City should have in spurring economic development?
- Is the City doing enough to spur economic development?
- Is the City doing too much to spur economic development?
- What existing programs are you aware of that support economic development?
- Do you have ideas for new programs to support economic development?
- What is your largest priority from an economic development perspective?
- Would expanding the City's commercial businesses be desirable in order to lower the portion of property taxes paid by residents?
- Do you desire more employment opportunities within the City of Bowie?
- Would you support additional housing in Bowie to support the existing or future businesses?
- Should the City of Bowie taxpayer money be used to support economic development in the City of Bowie?
- Should the City of Bowie devote more time to existing business's needs, business expansion or maintain the status quo?
- How many minutes are you willing to drive to get to your preferred dining/restaurant?
- How many minutes are you willing to drive to get to your preferred job or place of employment/
- How many minutes are you willing to drive to get to your preferred shopping/stores?
- How many minutes are you willing to drive to get to your preferred doctor, dentist, accountant or lawyer?

THE FINDINGS

The findings from both the interviews and online survey were largely aligned. Major findings included the generally high satisfaction with the City; its services and quality of life; the ideal location of the City; the desire for increased higher quality retail; the lack of awareness of existing programs that support economic development; and a dichotomy within the community on growth. Some examples of the findings are noted below. Detailed findings from the stakeholder engagement analysis can be found in the strengths, weaknesses, opportunities and threats (SWOT) assessment in the next section of this document.



REVIEW OF PLANNING MATERIALS

In addition to direct engagement with stakeholders, the JFI-Margrave Team also reviewed several existing plans and studies on the City of to inform our Economic Development Strategic Plan. These documents, written as long ago as 2006 or as recent as 2021, provided a framework within with the JFI-Margrave Team's strategies must operate. The reviewed planning materials included:

- Approved Master Plan and Sectional Map Amendment for Bowie and Vicinity – February 2006
- Approved Bowie State MARC Station Sector Plan and Sectional Map Amendment – January 2010
- Bowie EDC Economic Competitiveness SWOT – 2015
- Bowie EDC Strategic Economic Development Vision for Bowie, Maryland in 2030 – October 2016
- City of Bowie Sustainability Plan – November 2016
- City of Bowie Trails Master Plan Update – September 2019
- Bowie and Prince George's County Retail Opportunities and Demographics – March 2020
- City of Bowie Development Sites & Transportation Projects Outline – December 2020
- City of Bowie Development Review Guidelines and Policies – March 2021
- Approved Bowie-Mitchellville and Vicinity Master Plan – March 2022



SWOT Assessment

SWOT ASSESSMENT

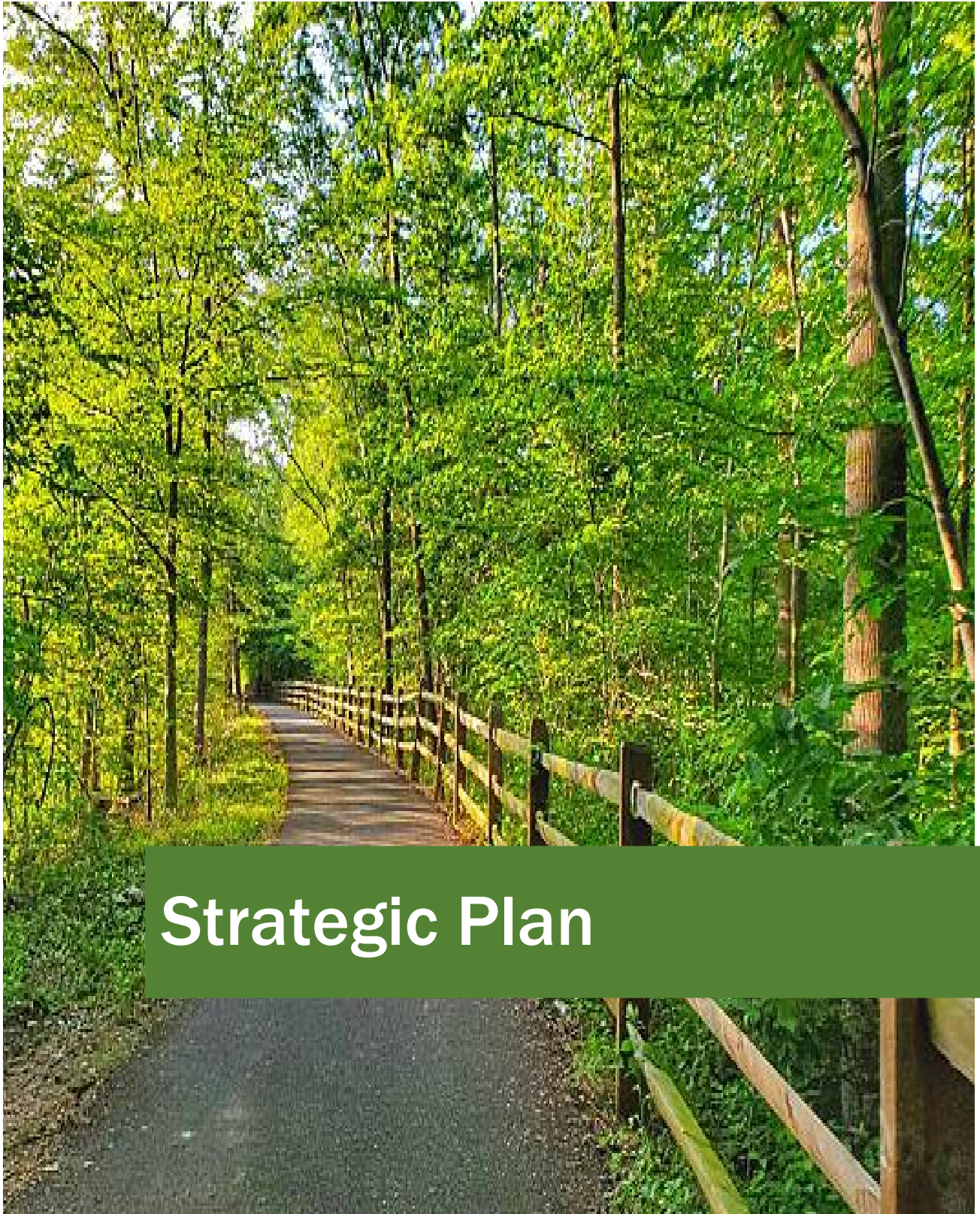
A strengths, weaknesses, opportunities and threats (SWOT) assessment is a commonly used strategic planning technique to begin any sort of analysis of an organization's current operating conditions and to develop new strategies. A SWOT reviews areas where an organization is excelling, opportunities for improvements, organizational vulnerabilities and any obstacles that could jeopardize success.

Typically, strengths and weaknesses are internal to an organization, while opportunities and threats are external factors that still have an impact on the organization. This brainstorming exercise provides an assessment of an organization's current condition and begins to outline future opportunities, or in this case, recommendations for actions to spur economic development and solidify the City's economic development strategy.



STRENGTHS	WEAKNESSES
• The City has strong name recognition and generally has a positive connotation as being a safe, pleasant place to live. Name recognition is present in the County, but also in the region. • The City is home to a highly educated, high-income and diverse population. • Residents report a high quality of life in the City. Stakeholders reported on the quality of schools, relatively affordable housing stock and access to shopping and dining destinations as reasons Bowie has a high quality of life. Many enjoy and actively sought out a bedroom community to reside in. • The City government is viewed as strong and competent – residents are satisfied with government operations and believe high quality services are being provided for their tax dollars. • The City's financials are strong – there is a historically stable tax rate, a robust reserve, good bond rating, etc. • The City's police department provides excellent service that distinguishes incorporated Bowie from other areas of the County and contributes to the sense of safety within the community. • The City has a robust parks and recreation system. • Bowie is one of the few municipalities in Prince George's County with economic development staff.	• There is a perception that the City Council and community at large do not fully understand positive impacts of development or economic development. • The City has a smaller employment base than peer jurisdictions. • Growth in the City's employment base is lagging the County and many peers • There is a perception of antigrowth sentiment of some elected leaders. • There is a level of uncertainty of the City Council's stance on development in the process by the development/business community. • There is a lack of public transit connecting destinations within and in proximity to the City, resulting in auto-dependent development. • The City is not perceived to have a strong brand or identity that reflects modern Bowie; this results in a lack of a "sense of place." • The "bedroom community" sentiment in the City does not feel welcoming to businesses. • A perception that the City's external marketing to businesses appears limited. • The City doesn't appear to have targeted industry/industries to recruit and bring into the jurisdiction. • There is a perception that the City is litigious, which does not appear friendly to business. • City population is aging, but there is limited housing development to support younger residents moving into the community.

OPPORTUNITIES	THREATS
• The City is centrally located along major transportation routes and equal distance between Washington, DC, Baltimore and Annapolis. This location is ideal for those seeking a “bedroom community” environment. • The high traffic volume on major corridors in/around the City result in high visibility for Bowie. • The public schools in Bowie are perceived as better than public schools elsewhere in Prince George’s County. • The high presence of federal workers residing in the City makes the community somewhat recession proof. • The City’s proximity to Bowie State University can be used to build a workforce pipeline for City businesses. • The City has a large collection of sports and recreation facilities in and around its boundaries, including the Bowie Baysox, Bowie Race Track property and Liberty Sports Park. There is an opportunity to become a sports and recreation destination in the region.	• County development process is seen as a barrier. Businesses/developments must go through the County’s process for permitting and approvals – this process is slow and unpredictable, making it less desirable to industry. • Prince George’s County quality of life/schools are seen as lagging neighboring County peers. • There is a strong sense of ‘NIMBYism’ and vocal opposition to new development, particularly residential development. • High quality, desired retailers have left Bowie in recent years for nearby areas like Crofton or Gambrills. This has contributed to the perception that Bowie Town Center has declined in quality. • The City doesn’t have enough high-quality amenities for the business community to keep employees in the area after work hours. • There is a disconnect between the desired amenities of the community and the economic reality of bringing those amenities to the City. • Bowie is not a focused priority area for the County or the State, so may struggle to receive funding attention from these entities. • There is a perception of traffic congestion throughout the City, making getting around difficult.



Strategic Plan

CITY OF BOWIE ECONOMIC DEVELOPMENT STRATEGIC PLAN

The JFI-Margrave Team has identified 12 recommended action items across four strategic areas of focus to support efforts to achieve the City's goals to support high quality job creation in and expand the tax base of the City. These proposed Recommended Actions will require policy changes, budget line items and potentially an increased Economic Development Department to fully implement the suggested changes.

STRATEGIC AREAS OF FOCUS

Over the course of this engagement, the JFI-Margrave Team continued to search for the most impactful strategies that could achieve the economic development goals of the City. To capture the energy and focus on this effort by all stakeholders, the JFI-Margrave Team needed to think about things differently. Rather than *only* giving the City a list of recommended actions, the JFI-Margrave Team pivoted to provide the City a strategy through **Strategic Areas of Focus**. Areas of Focus are the foundation stones of the strategy. They expand on the vision and start to create some structure to help the City to achieve its goals. Questions leading to the development of the Areas of Focus were:

"How can the City of Bowie, get the most 'bang for their buck'?"

"What 'big-ideas' can encapsulate the economic development recommended actions most effectively?"

"How can we be sure there are few targeted areas that through concentrating the recommended actions can effectively generate the most economic development impact?"

Through these questions, four Strategic Areas of Focus emerged:

- 1.) Utilize creative placemaking to support economic development, with an initial focus on Bowie Town Center.**
- 2.) Leverage Bowie State University as the City of Bowie's most natural anchor institution.**
- 3.) Distinguish the City as an athletic recreation tourism hub.**
- 4.) Expand the City's business base through targeted business startup, expansion and retention efforts.**

The four Strategic Areas of Focus are described on the subsequent pages along with their associated Recommended Actions. The JFI-Margrave Team intentionally drafted the Strategic Areas of Focus and their Recommended Actions as manageable yet incredibly impactful opportunities that can increase the number of non-residential taxpayers to reduce the residential taxpayers' burden and maintain and enhance a high quality of life for current and future generations.

FOCUS 1 | UTILIZE CREATIVE PLACEMAKING TO SUPPORT ECONOMIC DEVELOPMENT WITH AN INITIAL FOCUS ON BOWIE TOWN CENTER

Placemaking is a multifaceted approach to the planning, design and management of community spaces. In the City, increased placemaking could help capitalize on existing assets and add new resources to create a strong sense of place. Through real estate development, reconfiguration and activation of public and private spaces, new amenities and growth of the business base, the City can directly implement and support stakeholders to use placemaking in order to enact changes that promote health, happiness, well-being and comfort for any of the City's residents and visitors.

Placemaking is often most recognizable in downtowns, as downtowns tend to be the heart and soul of a community. In the case of a suburban areas, downtowns are the areas in which the community is often spending its time dining, shopping, and socializing. In many instances downtowns are a primary indicator of larger social and economic trends happening within a community. The City is often referred to as a bedroom community - a residential suburb inhabited largely by people who commute to a nearby city for work. In the case of Bowie, many of its residents are commuting to work throughout the region, predominately, Washington, DC. Despite earning their income outside of the City, many of these residents want to have daily conveniences and experiences near their home that come with a "downtown" environment.

Downtowns create hubs of convenience, experience and interaction for the community. They bring desired elements of a bustling urban area to a small town, simultaneously meeting the needs of the existing community while attracting others who want the "best of both worlds." Bowie Town Center is the logical location for a "downtown in Bowie," although the placemaking action items identified in this strategy can be broad applied to other targeted areas in the City. The initial strategic action items focus on this area because through its location, Bowie Town Center functions as the heart of the City. Bowie Town Center has the existing space, infrastructure and functionality to quickly implement these proposed actions, where in other developments in the City, that may not be the case.

Bowie Town Center was the most popular topic during the stakeholder engagement task. The most common critique of the Town Center is that residents and stakeholders feel that there is a gap between the retail that they desire and typically frequent and the retail tenants within the center. Stakeholders expressed that the lack of "high-end" retail within the Town Center has resulted in them shopping outside of Bowie. In summary, there is a misalignment between the aesthetic appearance and quality of the retailers in the Town Center and the socioeconomic makeup of the community.

While the modernization of the Bowie Town Center is perhaps one of the most impactful projects within the City and should be a core strategic focus of the City's economic development strategy, all areas of the City can benefit from enhanced placemaking to enhance the quality of the City's built environment to meet the changing needs and desires of its residents and employers. Other areas within the City, notably Old Town Bowie, could benefit from efforts to improve placemaking and attract new development activity. It is the JFI-Margrave Team's opinion that efforts at Bowie Town Center will have the strongest near-term impact. Building on success in these efforts, these strategies could be subsequently deployed to other areas in the City. The JFI-Margrave Team suggests the City focus on the following six Recommended Actions to create

a long-term impact on the success of the Town Center and other targeted areas, such as Melford and Old Town Bowie, within the City:

RECOMMENDED ACTION 1 | ACTIVELY MARKET AND SUPPORT RETAIL SPACE AND ENCOURAGE HIGH QUALITY DEVELOPMENT

The decline in perceived quality of the Bowie Town Center has been touched on by nearly every stakeholder group interviewed during the creation of this strategy. Given the Bowie Town Center's position to be a major anchor within the County, as well as its central location and outsized draw, the success of this center is critical to the success of Bowie's commercial tax base.

The Bowie Town Center has a relatively high occupancy rate, so from the perspective of the ownership group, it may be considered a successful and viable property. If the City desires to see higher caliber tenants, they should play an active role in the attraction and retention of "high quality" retailers through a curated, proactive approach to assist property owners to attract desirable tenants to the property. The City can help do this by providing Bowie Town Center ownership, as well as targeted businesses, with marketing tools and data points demonstrating the demographics and income levels within the City, or by representing the City at large trade shows and events, such as the International Council of Shopping Centers. In its soon to be released Economic Development Strategy, Prince George's County identifies Destination Retail as a key industry. The City should identify ways to work with the Prince George's County Economic Development Corporation to integrate City retail efforts into the broader County strategy.

In addition to providing proactive support to development and retail attraction efforts described above, an immediate low-cost policy option to enhance Bowie Town Center (as well as other identified target areas like Old Town Bowie) is for the City to continue to host events and programs on site. Moving existing events such as the Bowie Farmers' Market, summer concert series, and holiday events as well as supporting new events in these areas will drive traffic and populate activity.

RECOMMENDED ACTION 2 | CONTINUE TO SUPPORT MIXED-USE DEVELOPMENT IN KEY AREAS OF THE CITY AS A TOOL TO ENCOURAGE PLACEMAKING, VIBRANCY AND WELL-PLANNED DENSITY.

By far the largest trend in real estate development, particularly in the Baltimore-Washington Metropolitan area, is the development of mixed-use communities that provide an active and engaging place to "live, work, play and learn." These types of development often mix residential, commercial and office settings to create a dynamic environment that is activated 18 hours a day, whereas each use on its own may only be active within smaller windows of time. When designed properly, mixed use developments become robust economic anchors and destinations within an area. Additionally, having multiple uses collocated reduces the need for separate vehicle trips, thereby reducing traffic in and around the development.

Specific to the City of Bowie, support for mixed-use developments helps to accomplish two major goals of the municipality: growing the tax base to reduce the burden on single family residential property owners and diversifying the housing stock to provide housing attractive to a young professional in an attempt counteract the City's aging population. Residential components of mixed-use projects are often multifamily rental buildings, which have a low burden on municipal services. Though rental buildings are common in mixed-use developments, fee-simple products can also be

utilized to create a dynamic environment. The Maple Lawn community in nearby Howard County has created a neighborhood of nearly entirely fee-simple products with a thriving retail environment that has become an anchor for the area.

Bowie Town Center provides a significant mixed use development opportunity. The City of Bowie received a referral from M-NCPPC for a proposed subdivision plan for the Sears property at Bowie Town Center where a developer has proposed a mixed-use concept for the property. There are several conditions required by the developer for this mixed-use development, including a maximum of 600 units within the development on Lot 6.

Based on the feedback from numerous stakeholders there is a clear need within the City for a rental housing, as well as a desire for additional and higher quality retail to locate at Bowie Town Center. Changing patterns of development are favoring denser, more urban, mixed-use development and the younger workers driving key sectors such as information technologies, government contracting and research-intensive industries targeted by the County are increasingly favoring more urban settings. Supporting mixed use development can, in many ways, support both retail and economic development while meeting demands for rental housing. With the additional density or “roof tops” added to support the retail base, the Town Center will be better able to attract the desired retailers and attract younger, high demand workers. Although the JFI-Margrave Team is not endorsing any specific plan or developer, the concept to add a “live, work, shop” element to Bowie Town Center will help create the desired ecosystem that many residents find attractive. Similar concepts could be applied elsewhere in the City, such as Melford.

Successful mixed-use developments, provide integrated housing retail and office space to create the “live, work, play” environment desired by many employers and younger workers. Prior to the covid-19 pandemic, which is reshaping the national and regional commercial real estate markets, Prince George’s County lagged its core peers (Montgomery County and Fairfax City/County) in office space inventory, price and vacancy. Historical patterns of development and demand have favored the development of industrial and flex space in the County over office space. In 2019 (the year before the pandemic), Prince George’s County accounted for only 5.6% of the Washington Metropolitan Area’s inventory of office space, but 11.6% of Flex space and 19.9% of Industrial Space. The lower rental rates charged for office space in the County compared to neighboring jurisdictions makes the County attractive to office users, but these rates have been identified as a barrier to the development of new and speculative office space, as County land and development costs are not much lower than regional peers. Consistent with the County as a whole, the City has seen only limited demand for office space, despite its location on Route 50 and strong workforce assets. With 1.8 million square feet of office space, the City lags both closer in County (College Park, Greenbelt, Laurel) peers and Annapolis in its inventory of office space.

While a lack of demand has limited past development of office space in the City, demand conditions can be expected to change in the future. Prince George’s County is becoming a more attractive location for the technology and professional, scientific, and technical services firms that drive the larger Maryland and Washington Metropolitan Area economies. Additionally, the market for office in some inner-Beltway developments, such as UMD’s Discovery District, are doing well. Moreover, while the effects of the current pandemic on commercial real estate have been quite negative, one line of thought is that it may create more demand for lower cost suburban options for satellite office space outside of higher cost city centers and located closer to the region’s predominantly suburban

workforce. As a result, the City should consider working with the development community to retain some of its prime development space in existing and planned mixed-use communities for future office space demand through formal agreements, incentives and zoning. This will position the City to capture some of the expected County growth in technology businesses and professional, scientific, and technical services.

Another method of supporting attractive mixed-use development is to encourage walkability, bikeability and related creative placemaking in new developments. Despite the fact that the City does not grant entitlements for new developments, the City's stated opinion on projects does carry weight with the Prince George's County Planning Board. As such, the City should continue to encourage and promote walkability and bikeability in new developments as a way to provide increased connectivity and create a stronger sense of place. This concept is especially important for infill development, which may happen in smaller, piecemeal segments. Large master planned communities tend to include these principles in their designs, but working to enhance the walking and biking routes throughout town to major commercial destinations will continue to make Bowie and attractive place to new businesses and residents.

RECOMMENDED ACTION 3 | CREATE A RETAIL ATTRACTION FUND

A retail attraction program or fund should be considered in the City in order to address the community's perception of not having the appropriate level of retail within the City's boundary commensurate with the levels of income that the City's residents have. A retail attraction fund or forgivable loan program could be used by the City to encourage new restaurants, grocery or specialty food stores, clothiers, home goods companies, and other unique/boutique shops to locate in the City. Under such a program, funds could be used for signage, storefront improvements, interior improvements, or relocation costs as either a local match for private investment or a grant to incentivize this retail attraction effort. These efforts should be initially focused on Bowie Town Center and other target communities, notably Old Town Bowie, but flexible enough to support related desirable investments in other communities.

RECOMMENDED ACTION 4 | IMPLEMENT A COMMERCIAL FAÇADE IMPROVEMENT PROGRAM

Many of Bowie's peer municipalities have implemented Commercial Façade Improvement programs as a way to incentivize and subsidize the cost of improvements made to commercial buildings. Each program works slightly differently, but generally provides a grant that can be used for enhancements to the public realm and streetscape of a business – paint, signage, windows, lighting, street greenery, outdoor furniture, etc. The Maryland Department of Housing and Community Development's "Community Legacy" program provides funds to municipalities to create these types of programs, meaning a program could be implemented at no out-of-pocket cost to the City. Once a program is established, the City can promote the program to property owners and businesses, particularly those in need of aesthetic enhancements, to encourage investments into the streetscape.

RECOMMENDED ACTION 5 | WORK WITH COUNTY OFFICIALS TO STREAMLINE PROCESSES FOR PERMITS, INSPECTIONS AND ENFORCEMENT.

The real-estate and residential communities alike have expressed concerns with the amount of time it takes to navigate the Prince George's County permit and approvals process. Many stakeholders lamented that the process has gotten better over time, but still lags in comparison to other counties

in Maryland. Though the City does not control this process, it is still a barrier that has resulted in business leaving Bowie for nearby Anne Arundel or Howard counties.

As it has done in the past, the City should continue to advocate for enhanced and streamlined processes at Prince George's County's Departments of Permits, Inspections and Enforcement (DPIE). As the largest municipality in the County, Bowie is adversely affected by these policies more than any other jurisdiction. City staff and legislators should regularly meet with the County officials to determine if there are ways the City can support efficient processes at the County level, as well as to bring up any recurring issues experienced by property owners in the City.

RECOMMENDED ACTION 6 | COMPLETE AN ASSESSMENT OF PROPERTY IN OLD TOWN BOWIE AND CREATE AN AREA DESIGNATED FOR SMALL AND LOCAL BUSINESSES.

There is desire by many of the stakeholders interviewed for Old Town Bowie to become a vibrant "main street" destination. Existing land ownership and uses within Old Town are fragmented, resulting in a piecemeal built environment. Currently, Old Town Bowie is made up only of a few blocks connected by a bridge anchored by the Welcome Center and Railroad Museum. The area has one large restaurant surrounded by several antique shops and other small businesses or residences. There is no comprehensive plan or strategy focused specifically on this part of the City. In the past there have been attempts by the City to acquire property in order to support local artisans, but unfortunately the attempts were unsuccessful.

The City should embark on a planning effort and conduct an assessment of the land within Old Town. This property scan should look at building ownership, land use and any businesses currently located in the area. From there, the City can scan the area for potential property acquisition by the City or County and, in turn, opportunities for repurposing buildings in Old Town into uses such as galleries, workshop space, maker space, technology economy style startups, small eateries/dining options, boutiques and retail for the community and tourists. This type of investment may also require rental assistance, incentives and other subsidy from the City based on the what types of tenants the city would like to prioritize in the area. However, by creating a place for small businesses to locate outside of the high price tags of other larger developments, it can create the charming main street style hub that has been envisioned by many.

FOCUS 2 | LEVERAGE BOWIE STATE UNIVERSITY AS THE CITY OF BOWIE'S MOST NATURAL ANCHOR INSTITUTION.

Anchor institutions are place-based, mission-driven entities such as hospitals, universities, and government agencies that leverage their economic power along with their human and intellectual resources to improve the long-term health and social welfare of their surrounding communities. Despite not being within its incorporated limits, Bowie State University (BSU) is the clear and natural anchor institution for the City. Moreover, BSU is expanding its efforts to support economic development adjacent to the City through building and planning new buildings along the campus edges, and entering into a joint development solicitation with the County to develop the 97 acres adjacent to campus at the MARC station. Cooperation between the City and BSU in these activities can enhance the success of each.

BSU has 6,308 students, 1,904 of which reside on campus and nearly 1,000 employees working on campus every day. Under the bold leadership of the current President, BSU has an impressive talent pool of young professionals and is making headlines for new partnerships and programs. Many of these programs involve workforce development, entrepreneurship and supporting small businesses.

Anchor institutions - with the proper incentives and motivation - have the economic potential to leverage their assets and revenues to promote local private sector development through means such as:

- Directing a greater percentage of their purchasing power toward local vendors based in the community.
- Hiring a greater percentage of their workforce locally.
- Incubating the development of new businesses, including social enterprise nonprofits.
- Serving as an advisor or network builder.
- Leveraging real estate development to promote local retail, employer-assisted housing, and community land trusts.
- Contributing to a vibrant community by providing a well-educated workforce that may choose to remain in the area post-graduation.

By using the tools above, anchor institutions can have a major impact on the economic development in the local community. A great local example of an anchor institution supporting the economic development goals of its community is the University of Maryland, College Park and its outsized impact not only on the City of College Park, but also on neighboring jurisdictions like Riverdale Park and University Park. If harnessed properly, similar effects may be able to take place in the City.

BSU is not within the limits of the incorporated City of Bowie, however, the two entities share a name and are major stakeholders to one another. The relationship between the City and University seems to change over time depending on leadership and any pressing issues at the moment. Creating a year-round, evergreen relationship and partnership with BSU could strengthen the local economy by leveraging BSU's position as an anchor institution with positive spin out effects on the City. Recommended Actions to help foster the relationship with BSU include:

RECOMMENDED ACTION 7 | CONTINUE TO SUPPORT THE BOWIE BUSINESS INNOVATION CENTER AND DEVELOP INCENTIVES FOR ITS GRADUATES TO PERMANENTLY LOCATE IN BOWIE.

The creation of the Bowie Business Innovation Center (Bowie BIC) as a tool for growing and incubating small business is a huge asset to the region that helps Bowie stand out among its peers. The City should continue funding this organization, but also look at new and creative ways to continue to drive value out of the dollars the City puts into the Bowie BIC.

Though the work of Bowie BIC is undoubtedly impactful, the program is open to business located throughout Prince George's County, and as a result, many of the successful businesses stemming out of the BIC do not touch or directly impact Bowie's economy. The City should develop a program to further incentivize Bowie BIC alums to stay in, or relocate to, Bowie. One way this can be accomplished is by working with landlords of commercial products in the City with high vacancy rates to develop a feeder program, linking Bowie BIC graduates to available commercial spaces in the City. If possible, these linkages could be further supported by City provided lease supports or selected landlords may be able to provide temporary reduced rates to Bowie BIC companies in order to keep them within City limits. This could enhance demand for office space in the City, reduce vacancy rates and enhance the City's ability to maximize the local economic impact of its investment

in the Bowie BIC. If successful, this program could be extended to federal contractors, small businesses, and other City targeted industries.

RECOMMENDED ACTION 8 | DEVELOP A ‘LIVE WHERE YOU WORK’ PROGRAM.

Live Where You Work programs have been established throughout the region as an incentive to encourage a specific group of people to purchase homes within a particular area. These programs work to lessen commute times, reduce reliance on single occupancy vehicle trips to get to work, increase engagement between a community and eligible employees, and can be a meaningful human resources tool to attracting and retaining top talent. The City of Bowie should consider working with BSU to develop a Live Where You Work program to encourage BSU faculty and staff to purchase a home within City limits. Typically, these programs are geared towards homeowners and provide down payment or closing cost assistance in the form of a forgivable loan to qualified individuals who purchase a home within City limits. Additionally, this is a benefit that could be extended to targeted employers (such as Innovalon) as well as to City staff itself building on the City Grants Department’s program to assist with closing costs for nurses, teachers, police, and other employees. Municipal employees who reside within the City are often considered “essential employees” due to their proximity to work and can often support the City during major weather events and situations where far travel to City Hall is not reasonable.

Existing programs within the County, such as the College Park City-University Partnership Homeownership Program, require each participating entity to make a financial contribution to fund the program. The Maryland Department of Housing and Community Development’s “Community Legacy” program provides additional funding to municipalities that can be used to establish, and fund, these types of programs, limiting the cost to Bowie.

Beyond the specific actions the JFI-Margrave Team has proposed above, below are additional ideas that could spur a more tangible and positive relationship with BSU:

- Advertise BSU events and share good news stories through the City’s local media channels, such as the Bowie Spotlight.
- Create a stronger BSU presence within the City through marketing campaigns and the presence of BSU paraphernalia at local businesses as a way for the business community to support and promote the University and vice versa.
- Create an internship program for BSU students with the City. Municipal governments provide a diverse array of employment experiences from finance to engineering to public safety, which would provide important experiential learning opportunities for BSU students while enhancing the relationship between the City and the University.
- Integrate the City into the campus culture at large BSU events, such as Homecoming, to demonstrate that the community is celebrating the University.
- Work with the local business community to offer BSU students, faculty, staff discounts at City retailers.
- Support Bowie State University’s application to become a RISE Zone through the Maryland Department of Commerce.

FOCUS 3 | DISTINGUISH THE CITY OF BOWIE AS AN ATHLETIC RECREATION HUB

There is a high concentration of existing, new and future development opportunities related to recreation within and adjacent to the City. An opportunity exists to capitalize on the tourism needs of those athletes, teams and families utilizing these facilities as a way to spur economic growth. The covid-19 pandemic inspired a resurgence in the world of active outdoor lifestyle, specifically, walking, jogging and bicycling. Due to the City's well connected trail system, open spaces and other recreational amenities, the City can capitalize on these strengths as an economic development generator.

The City and its surrounding communities have an incredibly impressive array of sports and outdoor recreation venues. There are City facilities, Maryland-National Capital Park and Planning Commission (M-NCPPC) facilities and other privately run venues. The City has numerous playgrounds and community centers, a minor league baseball team, an ice arena, and some of the best access points to many trail systems, including WB&A connecting into Anne Arundel County. Also, within close proximity to the City is the Patuxent Wildlife Research Refuge, a 12,000 acre protected wildlife area. The City should lean into these amenities and brand itself around being a recreation destination.

In addition to the existing assets, the addition of the Liberty Sports Park adjacent to the South Lake community has the potential to become a major recreation draw in the region. Liberty Sports Park will feature dining, hotel and entertainment options just footsteps away from its 10 lit turf and grass fields. The City will undoubtedly see an uptick in athletic tourism once this facility opens and may begin to see increased demand for retail, hotels, entertainment and dining before, after, or between games. Additionally, the City of Bowie will become the owner of the Bowie Race Track property on (or before) December 31, 2023 as part of a larger restructuring of horse racing tracks in Maryland. Below are three Recommended Actions that could move the City toward an overall athletics tourism strategy:

RECOMMENDED ACTION 9 | MARKET THE CITY AS AN ATHLETIC RECREATION TOURISM HUB

The City should develop a targeted campaign to proactively marketing the City as a destination for athletic events and recreation. The City should work in cooperation with leadership of nearby private organizations, such as Liberty Sports Park or the Bowie Baysox to amplify messaging and promotion. Specific items to focus on are:

- Work with youth and adult sports leagues to market the City for tournaments and leagues, ensuring leagues are privy to other assets of the City beyond their athletic facilities.
- Work with the Bowie Baysox to determine some creative ways to program the stadium when it is not in use by the club, such as concerts, farmers markets, athletic events and other performances.
- Develop marketing materials on City assets, such as hotels, restaurants entertainment venues for distribution to athletic events planners and possibly even event participants.

RECOMMENDED ACTION 10 | WORK TO REDEVELOP THE BOWIE RACE TRACK PROPERTY INTO A REGIONAL RECREATION DESTINATION.

In 2023, the City of Bowie is poised to become the owner of the Bowie Race Track facility as part of a larger restructuring of horse tracks in Maryland. The Bowie Race Track, which has been vacant and unused since the mid-1980s, is a huge opportunity to preserve the community's equine history

while turning the blighted land into a recreation facility. Per an agreement executed in December 2020, the City should work closely with Bowie State University to develop a plan for the property and timeline for implementation. If properly planned and executed, there is potential for the property to become a revenue generator through the fees for hosting events for the City, as well as an amenity to the surrounding communities.

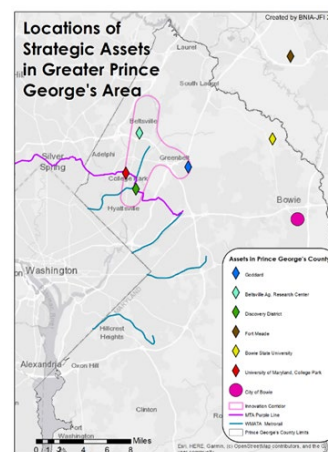
FOCUS 4 | EXPAND THE CITY'S BUSINESS BASE THROUGH TARGETED BUSINESS STARTUP, EXPANSION AND RETENTION EFFORTS

With only 0.29 jobs per resident, resident demands for enhanced retail options, and strong development potential in areas such as Melford, the City has the potential to expand its job base through targeted business startup, expansion and retention efforts. An expanded employment and commercial base will support the core strategic goal for the City of Bowie of lowering the tax burden on residential home owners, part of the impetus behind developing this strategy. As the City grows and additional services are being provided, it is important to the City Council to avoid homeowners carrying the full burden of those costs. As such, the City needs to grow, attract and retain commercial enterprise into the City. Typically, commercial buildings have a low need for service, yet contribute significantly in tax dollars. The analysis completed in Task 1 identified the following industries are areas where the City has the potential to attract more employment:

- Information Technology Services cluster, where the City is home to companies such as Inovalon.
- Government Contracting (overlapping with Information Technology Services).
- Hospitals and Health Services cluster, with the City experiencing strong growth in health care services employment.
- Destination Retail cluster, with the City having a high concentration of retail employment.

The City should target these industries to recruit into the City through a branding campaign, targeted outreach and strengthening relationships with the broker community and Prince George's County Economic Development Corporation.

There is an incredible array of major anchors nearby that many smaller or similarly compatible companies would want to co-locate near, such as, Bowie State University, University of Maryland College Park, NASA Goddard, Beltsville Agricultural Research Center, Fort Meade and many Prince George's County Government facilities, but still be proximate to Washington, DC, Annapolis and Baltimore. Given the City's location, there is an opportunity to recruit companies working with these anchors to Bowie. The JFI-Margrave Team has two Recommended Actions focused on creating an overall Targeted Business Startup, Expansion And Retention strategy:



RECOMMENDED ACTION 11 | CREATE AND IMPLEMENT A TARGETED MARKETING CAMPAIGN TO ATTRACT THE INFORMATION TECHNOLOGY, GOVERNMENT CONTRACTING, HEALTH SERVICES AND DESTINATION RETAIL SECTORS

A core goal of this strategy is for the City to diversify and expand its employment base through the attraction of high quality office and retail users. The JFI-Margrave Team has specifically identified the Information Technology, Government Contracting, Health Services, and Destination Retail sectors as core targets based on its assessment of the City economy and the Prince George's County Economic Development Strategy. In order to attract these and related industries, the City should develop a targeted marketing campaign integrated with the County's soon to be released strategy and develop materials to identify available real estate assets, City strengths (workforce, location, real estate costs, consumer base, etc.). The City Economic Development Department should work with key County economic development stakeholders (PGCEDC, developers, and others) to support, design and implement this campaign and continue to focus on marketing through the broader real estate broker community as well as directly to key regional/national business organizations.

A core goal of this targeted marketing effort will be to target CEO'S and C-suite level business leaders who reside in the Bowie to Annapolis corridor and begin to market the City as a means for relocation out of Washington DC. Our nation's capital is an incredible location for government contractors, technology innovation companies and an array of new and old businesses to choose to headquarter in the area. However, rather than living in Washington, DC, business leaders tend to reside outside of the District. As a result, many business leaders find themselves on the corridor from Bowie to Annapolis, MD due to its high quality of life and suburban nature. Since Bowie is located between both Annapolis and Washington, DC, the City should consider targeting CEO's and C-Suite level leadership to locate their businesses in Bowie as a means to simplify commutes for themselves and their employees, save on office rental costs and ensure increased access to parking. Many of the largest companies in Prince George's County have relocated their offices due to the location in which their CEO's or C-Suite Level leaders live. This targeted campaign could be led by the Economic Development Office.

To support this targeted marketing effort the City should enhance its ongoing outreach efforts to County and regional business organizations. There are many local business groups in and around Bowie and Prince George's County. The City currently interacts with many of the business groups, however, the City of Bowie should take a more proactive approach to interacting with them as a means to promote the City of Bowie as a community open for business. While these groups are often used for networking, there also are likely to be touchpoints with existing small businesses within the City, as well as opportunities to connect with startups or businesses outside the limits and relocate them to Bowie. Examples of groups that may be worthwhile increasing engagement with could be the Greater Bowie Chamber of Commerce, the Greater Prince George's Business Roundtable or the Prince George's County Chamber of Commerce. Additionally, being that Bowie is the County's largest municipality, the City should consider being represented in appointed/elected positions on one or a number of Boards for these organizations.

RECOMMENDED ACTION 12 | ENHANCE AND INCREASE PROMOTION OF THE CITY'S EXISTING ECONOMIC DEVELOPMENT TOOLS AND PROGRAMS.

While there was broad support for the City's economic development efforts among the businesses and developers interviewed, a common theme during these interviews and the online survey was the lack of knowledge about and utilization of these programs and tools. The economic development page on the City's website provides access to excellent resources, such as Bowie SizeUp, a market analysis tool; profiles of new and upcoming exciting projects; and the City of Bowie Loan Fund. These resources exist but aren't well known by stakeholders or residents. The City should work to better promote these and other resources in order to aid the business community within its limits.

IMPLEMENTATION MATRIX

The Implementation Matrix is a tool designed to assist City staff and elected officials with the implementation of each of the Recommended Actions outlined in the previous section. The Implementation Matrix gives basic information necessary to start working on executing any particular action item. As such, the matrix is not an all-encompassing tool, rather is used to provide the most “need to know” information for each action based on the project team’s knowledge as of the date of this document. Over time the City should make slight revisions and updates to the Implementation Matrix to ensure it reflects any current realities not anticipated at the time the document was drafted. Specifically, the Implementation Matrix provides the following information:

- **Strategic Area of Focus & Recommended Action** – identifies each Recommended Action and the Strategic Area of Focus the action correlates to.
- **Leader/Implementer** – identifies who from the City should lead the effort - City Council or Staff. Although all items may pass through both entities, it is important to distinguish the origins of each Recommended Action’s implementation.
- **Partners** – lists any notable partners to work with when implementing the Recommended Action.
- **Budget Impact** – indicates the estimated budget impact of the Recommended Action. To guide this portion of the matrix, the JFI-Margrave Team has come up with the following budget estimates:
 - o **\$** - This item is estimated to cost between \$0 and \$25,000 to implement.
 - o **\$\$** - This item is estimated to cost between \$25,00 - \$50,000 to implement.
 - o **\$\$\$** - This item is estimated to cost more than \$50,000 to implement.
- **Timeframe** – outlines how quickly the action can be implemented. To guide this portion of the matrix, the JFI-Margrave Team has come up with the following definitions:
 - o **Short-Term** – this action is relatively quick and can be completed either with little prep, typically within 6-12 months from action initiation.
 - o **Mid-Term** – this action is anticipated to take a moderate amount of time to fully implement, between 12-24 months, and/or involves a moderate level of preparation to be able to start implementation. Preparation could involve aligning partners, preparing for a budget impact, or completing any precursor activities that must take place before implementing the action.
 - o **Long-Term** – this action is anticipated to take a long time to fully implement and requires significant preparatory work before implementation can begin. Actions labels as long-term may take anywhere from 2-5 years to fully implement.
- **Key Goals of the RFP** – ties back to the original goals of the RFP, which are:
 - o 1. Offer strategies to the City that will maximize the use of its economic assets and overcome any key challenges that currently impede the City’s competitiveness in attracting, retaining, and developing high-growth industries and stimulating economic growth.
 - o 2. Identify the industries, industry locations and real estate structures that have the best opportunity to thrive in the City and that can be economic generators and catalysts for the City.
 - o 3. Identify current and potential regional high-growth industries, assess regional industrial and commercial market activity, and analyze the City’s key economic competitive advantages and challenges in attracting these high-growth industries.
 - o 4. Identify gaps, challenges, and opportunities and offer recommendations for high quality

job creation in the City. Identify retention and attraction and prepare the City's labor force to meet the future workforce (labor) demand in the region. Job growth should be tied to a specific metric e.g., increasing the number of local jobs from 30% to 55% in the next 20 years.

- o 5. Identify economic development strategies that will increase the City's net tax base by generating tax revenues that exceed the cost of public services needed to serve the new development.
- **Notes** – any additional notations or pieces of information that may be helpful to implement this action.

Focus Area	Recommended Action	Lead	Budget Impact	Potential Partners	Time	RFP Goal	Notes
1 UTILIZE CREATIVE PLACEMAKING TO SUPPORT ECONOMIC DEVELOPMENT WITH AN INITIAL FOCUS ON BOWIE TOWN CENTER	1.) ACTIVELY MARKET AND SUPPORT RETAIL SPACE AND ENCOURAGE HIGH QUALITY DEVELOPMENT	City Council/ City Staff	\$-\$\$\$	Washington Prime Group	Long-Term	1,3	This is a long-term item since this action should be continued over time. However, can begin immediately.
	2.) CONTINUE TO SUPPORT MIXED-USE DEVELOPMENT IN KEY AREAS OF THE CITY AS A TOOL TO ENCOURAGE PLACEMAKING, VIBRANCY AND WELL-PLANNED DENSITY	City Council	\$-\$\$	M-NCPPC, private property owners, developers	Long-Term	1,3	This is a long-term item since this action should be continued over time. But expression of supporting this could happen immediately.
	3.) CREATE A RETAIL ATTRACTION FUND	City Council/ City Staff	\$\$\$	-	Mid-Term	1,3	-
	4.) IMPLEMENT A COMMERCIAL FAÇADE IMPROVEMENT PROGRAM	City Council/ City Staff	\$\$-\$\$\$	Maryland DHCD	Mid-Term	1,3	-
	5.) WORK WITH COUNTY OFFICIALS TO STREAMLINE PROCESSES FOR PERMITS, INSPECTIONS AND ENFORCEMENT	City Council	\$	Department of Permits, Inspections & Enforcement	Short-Term	1,3	-

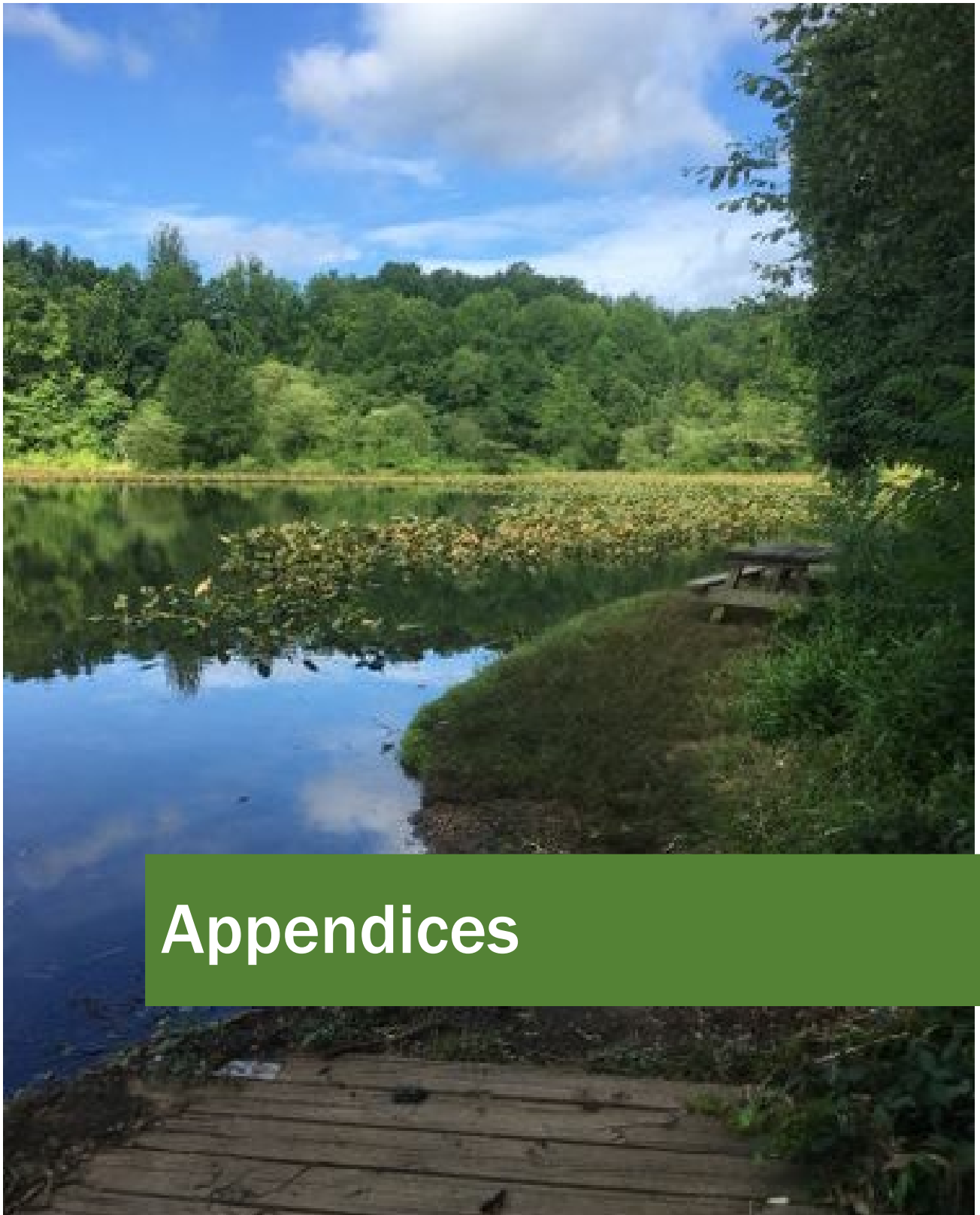
	6.) COMPLETE AN ASSESSMENT OF PROPERTY IN OLD TOWN BOWIE AND CREATE AN AREA DESIGNATED FOR SMALL AND LOCAL BUSINESSES	City Staff	\$	Private Property Owners/ Prince Georges County	Mid-Term	1,3	While the scan may be less costly, acquisition of buildings would require appropriate funding.
Focus Area	Recommended Action	Lead	Budget Impact	Potential Partners	Time	RFP Goal	Notes
2 LEVERAGE BOWIE STATE UNIVERSITY AS THE CITY OF BOWIE'S MOST NATURAL ANCHOR INSTITUTION.	7.) CONTINUE TO SUPPORT THE BOWIE BUSINESS INNOVATION CENTER AND DEVELOP INCENTIVES FOR ITS GRADUATES TO PERMANENTLY LOCATE IN BOWIE	City Council	\$\$	Bowie BIC, Local Landlords	Long-Term	2,4,5	While continued support of the BIC can happen immediately, it will take some time to develop incentives with local landlords in an effort to retain or relocate BIC graduates.
	8.) DEVELOP A 'LIVE WHERE YOU WORK' PROGRAM	City Council/ City Staff	\$\$-\$\$\$	Bowie State University, Major Employers within the City	Long-Term	2,4,5	Development of such a program will take time to draft guidelines, solicit buy in from employers and gather funds.

Focus Area	Recommended Action	Lead/Impl.	Budget Impact	Potential Partners	Time	RFP Goal	Notes
3 DISTINGUISH THE CITY OF BOWIE AS AN ATHLETIC RECREATION TOURISM HUB.	9.) MARKET THE CITY AS AN ATHLETIC RECREATION TOURISM HUB	City Council/ City Staff	\$-\$\$\$	Marketing Consultancies, Bowie Baysox, Liberty Sports Park, M-NCPPC, etc.	Long-Term	2,4,5	This is a long-term item since this action should be continued over time. However, can begin immediately.
	10.) WORK TO REDEVELOP THE BOWIE RACE TRACK PROPERTY INTO A REGIONAL RECREATION DESTINATION	City Council/ City Staff	\$\$\$	BSU	Long-Term	5	Though the planning for the race track property should start immediately, it will take several years over many phases to fully implement this item.
Focus Area	Recommended Action	Lead/Impl.	Budget Impact	Potential Partners	Time	RFP Goal	Notes
4	11.) CREATE AND IMPLEMENT A TARGETED MARKETING CAMPAIGN TO ATTRACT THE INFORMATION TECHNOLOGY, GOVERNMENT CONTRACTING, HEALTH SERVICES AND DESTINATION RETAIL SECTORS	City Staff	\$\$	Private Office Space Brokers, Marketing Consultancies, Government Contractor Firms, Curated Retailers, etc.	Long-Term	2,4,5	This is a long-term item since this action should be continued over time. However, can begin immediately.

EXPAND THE CITY'S BUSINESS BASE THROUGH TARGETED BUSINESS STARTUP, EXPANSION AND RETENTION EFFORTS	12.) ENHANCE AND INCREASE PROMOTION OF THE CITY'S EXISTING ECONOMIC DEVELOPMENT TOOLS AND PROGRAMS.	City Staff	\$	Business Community	Long-Term	2,4,5	This is a long-term item since this action should be continued over time. However, can begin immediately.
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CONCLUSION

As the largest of Prince George's County's municipalities, the City is a thriving community that offers a high quality of life and services to its residents. In order to continue its success, expand tax revenues, and better meet the retail and employment needs of its residents, the City needs to expand its business and employment base. With a fiscally sound City management structure, central location, competitive real estate market, strong workforce development assets, and a key economic development anchor, the City can attain its economic development goals. The City commissioned this Economic Development Strategy with this planned success in mind. The JFI-Margrave Team believes that this fact-based, stakeholder driven and actionable strategy consisting of four economic development foci and 20 specific Recommended Actions will assist the City to achieve its goals of increasing the number of non-residential taxpayers, expanding City revenues, and diversifying its business base. Doing so will require that the City work with a wide range of internal and external stakeholders. As a result, the City must invite its partners to buy in and participate in implementing this strategy. In doing so, this strategy will help the City to maintain and enhance a high quality of life, bring more shopping and employment choices to residents and continue to make Bowie an attractive place for generations to come.



Appendices

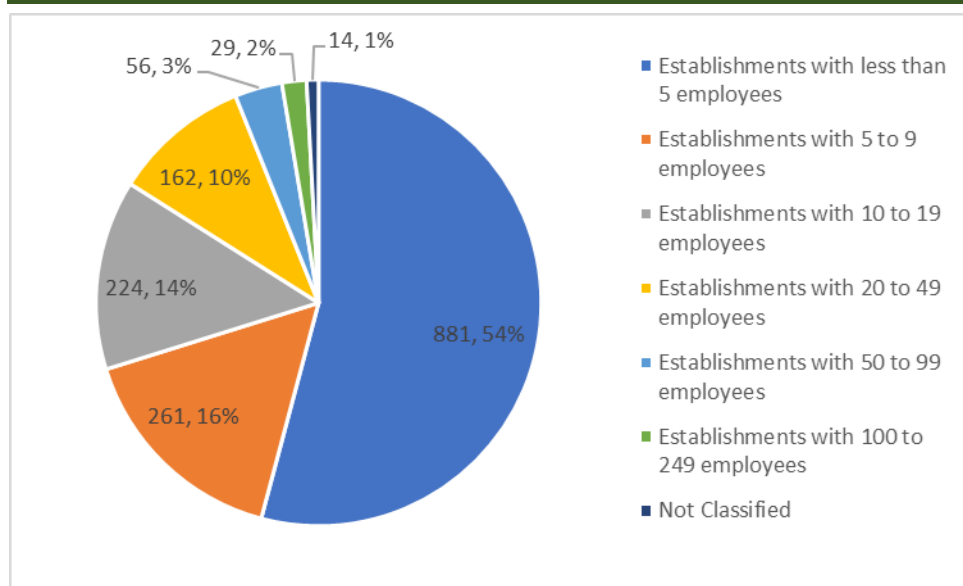
APPENDIX 1: DATA TABLES REFERENCED IN REPORT

Appendix Table 1: City of Bowie Employment Specialization, 2019			
Industry	Maryland LQ	Prince George's LQ	City of Bowie LQ
Total	1.00	1.00	1.00
Agriculture, Forestry, Fishing and Hunting	0.26	0.02	0
Mining, Quarrying, and Oil and Gas Extraction	0.09	0.04	0.00
Utilities	0.96	0.72	0.06
Construction	1.22	1.75	1.34
Manufacturing	0.48	0.28	0.04
Wholesale Trade	0.81	0.73	0.25
Retail Trade	0.98	1.12	1.88
Transportation and Warehousing	0.89	1.00	0.17
Information	0.69	0.48	2.08
Finance and Insurance	0.81	0.42	0.68
Real Estate and Rental and Leasing	1.10	1.25	0.28
Professional, Scientific, and Technical Services	1.49	1.02	1.51
Management of Companies and Enterprises	0.65	0.36	0.00
Administration & Support, Waste Management and Remediation	1.03	0.85	0.99
Educational Services	1.31	0.66	4.50
Health Care and Social Assistance	1.04	0.71	1.00
Arts, Entertainment, and Recreation	1.02	0.77	4.06
Accommodation and Food Services	0.93	1.05	1.38
Other Services (excluding Public Administration)	1.10	0.92	0.93
Public Administration	1.24	1.91	0.21
(LQ = level of specialization - National average = 1)			
Source: EMSI and Census On-the-Map			

Appendix Table 2: Top City of Bowie Employers by Sector

NAICs	Sector	Businesses	Employment
	Total	92	11,810
11	Agriculture, Forestry, Fishing and Hunting		
21	Mining, Quarrying, and Oil and Gas Extraction		
22	Utilities		
23	Construction	3	448
31-33	Manufacturing		
42	Wholesale Trade		
44-45	Retail Trade	22	2,574
48-49	Transportation and Warehousing	2	113
51	Information	1	832
52	Finance and Insurance	1	270
53	Real Estate and Rental and Leasing	1	130
54	Professional, Scientific, and Technical Services	10	1,159
55	Management of Companies and Enterprises		
56	Administrative and Support and Waste Management and Remediation Services	3	210
61	Educational Services	4	1,297
62	Health Care and Social Assistance	11	1,209
71	Arts, Entertainment, and Recreation	6	594
72	Accommodation and Food Services	14	1,380
81	Other Services (except Public Administration)	5	406
92	Public Administration	9	1,188

Source: City of Bowie and Hoovers

Appendix Figure 1: Bowie Zip Code Business Patterns

Appendix Table 3: Population Change, 2010-2019

	2010	2019	Change 2010-19	
			#	%
US	308,745,538	324,697,795	15,952,257	5.2%
Maryland	5,773,552	6,018,848	245,296	4.2%
Prince George's County	863,420	908,670	45,250	5.2%
Bowie	54,727	58,481	3,754	6.9%
College Park	30,413	32,159	1,746	5.7%
Greenbelt	23,068	23,219	151	0.7%
Hyattsville	17,557	18,242	685	3.9%
Laurel	25,115	25,767	652	2.6%
Annapolis	38,394	39,223	829	2.2%

Source: U.S. Census Bureau - American Community Survey

Appendix Table 4: Bowie Population by Gender and Age, 2010 v. 2019

	2010	2019	Change 2010-19	
			#	%
Total Population	54,314	58,481	4,167	7.7%
Gender				
Male	25,908	27,656	1,748	6.7%
Female	28,406	30,825	2,419	8.5%
Age				
Under 5 years	3,781	3,243	-538	-14.2%
5 to 9 years	3,782	3,263	-519	-13.7%
10 to 14 years	4,039	3,844	-195	-4.8%
15 to 19 years	3,303	3,619	316	9.6%
20 to 24 years	2,874	2,693	-181	-6.3%
25 to 34 years	6,395	6,958	563	8.8%
35 to 44 years	9,258	7,505	-1,753	-18.9%
45 to 54 years	9,271	9,944	673	7.3%
55 to 59 years	3,593	4,820	1,227	34.1%
60 to 64 years	2,471	3,954	1,483	60.0%
65 to 74 years	3,172	4,869	1,697	53.5%
75 to 84 years	1,881	2,669	788	41.9%
85 years and over	494	1,100	606	122.7%
Median Age	39.0	42.7		

Source: U.S. Census Bureau - American Community Survey

Appendix Table 5: Total Households, 2010-2019

	2010	2019	Change 2010-19	
			#	%
US	116,716,292	120,756,048	4,039,756	3.5%
Maryland	2,156,411	2,205,204	48,793	2.3%
Prince George's County	304,042	311,343	7,301	2.4%
Bowie	19,950	20,983	1,033	5.2%
College Park	6,757	7,407	650	9.6%
			-	-
Greenbelt	9,747	9,350	(397)	4.1%
Hyattsville	6,324	6,592	268	4.2%
			-	-
Laurel	10,498	9,740	(758)	7.2%

Source: U.S. Census Bureau - American Community Survey

Appendix 6. Median Household Income, 2010 v. 2019 and Poverty Rate

	Median Household Income			Poverty Rate
	2010	2019	% Change	
US	\$51,914	\$62,843	21%	13.4%
Maryland	\$70,647	\$84,805	20%	9.2%
Prince George's County	\$71,260	\$84,920	19%	8.5%
Bowie	\$101,671	\$113,338	11%	3.2%
College Park	\$62,366	\$66,679	7%	26.7%
Greenbelt	\$61,143	\$71,734	17%	10.2%
Hyattsville	\$54,839	\$81,736	49%	11.0%
Laurel	\$63,271	\$78,313	24%	7.4%
Annapolis	\$70,229	\$85,636	22%	11.0%
Crofton	\$100,553	\$123,858	23%	1.5%

Source: U.S. Census Bureau ACS 5-year estimates.

Appendix Table 7: Bowie Household Income Distribution, 2019

Total	% of Households
Less than \$10,000	2.3%
\$10,000 to \$14,999	1.0%
\$15,000 to \$24,999	2.2%
\$25,000 to \$34,999	3.8%
\$35,000 to \$49,999	6.2%
\$50,000 to \$74,999	12.7%
\$75,000 to \$99,999	12.6%
\$100,000 to \$149,999	25.4%
\$150,000 to \$199,999	16.6%
\$200,000 or more	17.3%

Source: U.S. Census Bureau ACS 5-year estimates.

Appendix Table 8: Place of Work

	Worked in State of residence:	Worked in county of residence	Worked outside county of residence	Worked outside State of residence	Worked in of place of residence
Maryland	83%	54%	29%	17%	17%
Prince George's County	59%	40%	19%	41%	8%
Bowie	71%	45%	25%	29%	14%
College Park	80%	60%	20%	20%	37%
Greenbelt	70%	48%	21%	30%	15%
Hyattsville	55%	38%	17%	45%	13%
Laurel	80%	41%	39%	20%	17%
Annapolis	90%	71%	19%	10%	32%
Crofton	82%	42%	40%	18%	12%

Source: Census ACS

APPENDIX 2: GLOSSARY

Analysis Language, Defined	
Sense of Place	Sense of place describes the individuality of place, its distinct character, and it also suggests a particular feel that makes the place stand out among other areas. Thus, this concept is strongly tied to the process of placemaking through which social, cultural or ethnic groups shape their environment and landscape.
Location Quotient	Location quotients are ratios that allow an area's distribution of employment by industry, ownership, and size class to be compared to a reference area's distribution. If an LQ is equal to 1, then the industry has the same share of its area employment as it does in the nation. An LQ greater than 1 indicates an industry with a greater share of the local area employment than is the case nationwide
Retail Leakage	Retail leakage occurs when local people spend a larger amount of money on goods than local businesses report in sales, usually due to people traveling to a neighboring town to buy goods. Retail sales leakage implies there is unsatisfied demand within the trading area

North American Industry Classification System - Sector Definitions		
NAICS Codes	Industry Title	Definition
11	Agriculture, Forestry, Fishing and Hunting	Establishments primarily engaged in growing crops, raising animals, harvesting timber, and harvesting fish and other animals from a farm, ranch, or their natural habitats.
21	Mining	Establishments that extract naturally occurring mineral solids, such as coal and ores; liquid minerals, such as crude petroleum; and gases, such as natural gas.
22	Utilities	Establishments engaged in the provision of the following utility services: electric power, natural gas, steam supply, water supply, and sewage removal.
23	Construction	Establishments primarily engaged in the construction of buildings or engineering projects (e.g., highways and utility systems).
31-33	Manufacturing	Establishments engaged in the mechanical, physical, or chemical transformation of materials, substances, or components into new products.
42	Wholesale Trade	Establishments engaged in wholesaling merchandise, generally without transformation, and rendering services incidental to the sale of merchandise.

44-45	Retail Trade	Establishments engaged in retailing merchandise, generally without transformation, and rendering services incidental to the sale of merchandise.
48-49	Transportation and Warehousing	Establishments providing transportation of passengers and cargo, warehousing and storage for goods, scenic and sightseeing transportation, and support activities related to modes of transportation.
51	Information	Establishments engaged in the following processes: (a) producing and distributing information and cultural products, (b) providing the means to transmit or distribute these products as well as data or communications, and (c) processing data.
52	Finance and Insurance	Establishments primarily engaged in financial transactions (transactions involving the creation, liquidation, or change in ownership of financial assets) and/or in facilitating financial transactions.
53	Real Estate Rental and Leasing	Establishments primarily engaged in renting, leasing, or otherwise allowing the use of tangible or intangible assets, and establishments providing related services.
54	Professional, Scientific, and Technical Services	Establishments that specialize in performing professional, scientific, and technical activities for others.
55	Management of Companies and Enterprises	Establishments that hold the securities of (or other equity interests in) companies and enterprises for the purpose of owning a controlling interest or influencing management decisions or (2) establishments (except government establishments) that administer, oversee, and manage establishments of the company or enterprise and that normally undertake the strategic or organizational planning and decision-making role of the company or enterprise.
56	Administrative and Support and Waste Management and Remediation Services	Establishments performing routine support activities for the day-to-day operations of other organizations.
61	Educational Services	Establishments that provide instruction and training in a wide variety of subjects.
62	Health Care and Social Assistance	Establishments providing health care and social assistance for individuals.
71	Arts, Entertainment, and Recreation	Establishments that operate facilities or provide services to meet varied cultural, entertainment, and recreational interests of their patrons.
72	Accommodation and Food Services	Establishments providing customers with lodging and/or preparing meals, snacks, and beverages for immediate consumption.
81	Other Services (except Public Administration)	Establishments engaged in providing services not specifically provided for elsewhere in the classification system.
92	Public Administration	Establishments of federal, state, and local government agencies that administer, oversee, and manage public programs and have executive, legislative, or judicial authority over other institutions within a given area.

Industry Clusters from Prince George's County Economic Development Strategy

Cluster Title	Definition
Four Target Industry Clusters	
Federal Government	Federal government establishments.
Hospitals and Health Services	Establishments providing health care focusing on larger hospital and related outpatient care facilities.
Information Technology Services	Establishments engaged in software development, communications, and computer services.
Research-Intensive Industries	Establishments engaged in research intensive activities, including Biosciences; Instruments and Electronics; and Research Development and Engineering.
Two Supporting Industry Clusters	
Destination Retail	Includes establishments engaged in larger retail activities, such as department stores, home centers, and warehouse clubs and supercenters that serve as destination shopping venues, and excludes retail activities such as food, drug and gasoline retailers that primarily serve the local population.
Transportation, Distribution, and Logistics	Establishments engaged in wholesaling merchandise and providing non-passenger transportations and support activities related to modes of transportation.