

# Demographic, Housing, & Permits Trends



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Planning and Permitting

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Government Maryland



# MWCOG: 10.0 Population

JURISDICTION	2020	2025	2030	2035	2040	2045	2050	2020 to 2050 Growth	
								#	%
<b>Frederick County</b>	<b>271.7</b>	<b>293.2</b>	<b>316.3</b>	<b>341.3</b>	<b>368.3</b>	<b>397.4</b>	<b>428.8</b>	<b>157.1</b>	<b>57.8%</b>
<b>City of Frederick (2)</b>	<b>78.2</b>	<b>83.8</b>	<b>89.5</b>	<b>95.1</b>	<b>100.8</b>	<b>106.4</b>	<b>112.0</b>	<b>33.9</b>	<b>43.3%</b>
Central Jurisdictions	1,109.3	1,170.2	1,222.2	1,289.3	1,333.5	1,381.2	1,428.5	319.2	28.8%
<b>Inner Suburbs</b>	<b>3,239.1</b>	<b>3,326.5</b>	<b>3,449.1</b>	<b>3,573.3</b>	<b>3,688.1</b>	<b>3,795.0</b>	<b>3,891.2</b>	<b>652.1</b>	<b>20.1%</b>
Outer Suburbs	1,404.5	1,503.7	1,607.3	1,682.2	1,749.5	1,812.2	1,872.4	467.9	33.3%
Virginia Jurisdictions	2,573.5	2,706.2	2,857.6	2,969.8	3,065.4	3,148.4	3,220.8	647.3	25.2%
Maryland Jurisdictions	2,468.2	2,550.3	2,661.0	2,780.8	2,897.2	3,009.6	3,115.9	647.7	26.2%
COG Region	5,731.3	5,954.2	6,247.2	6,507.8	6,749.7	6,974.5	7,181.1	1,449.8	25.3%



# Census: Population Totals

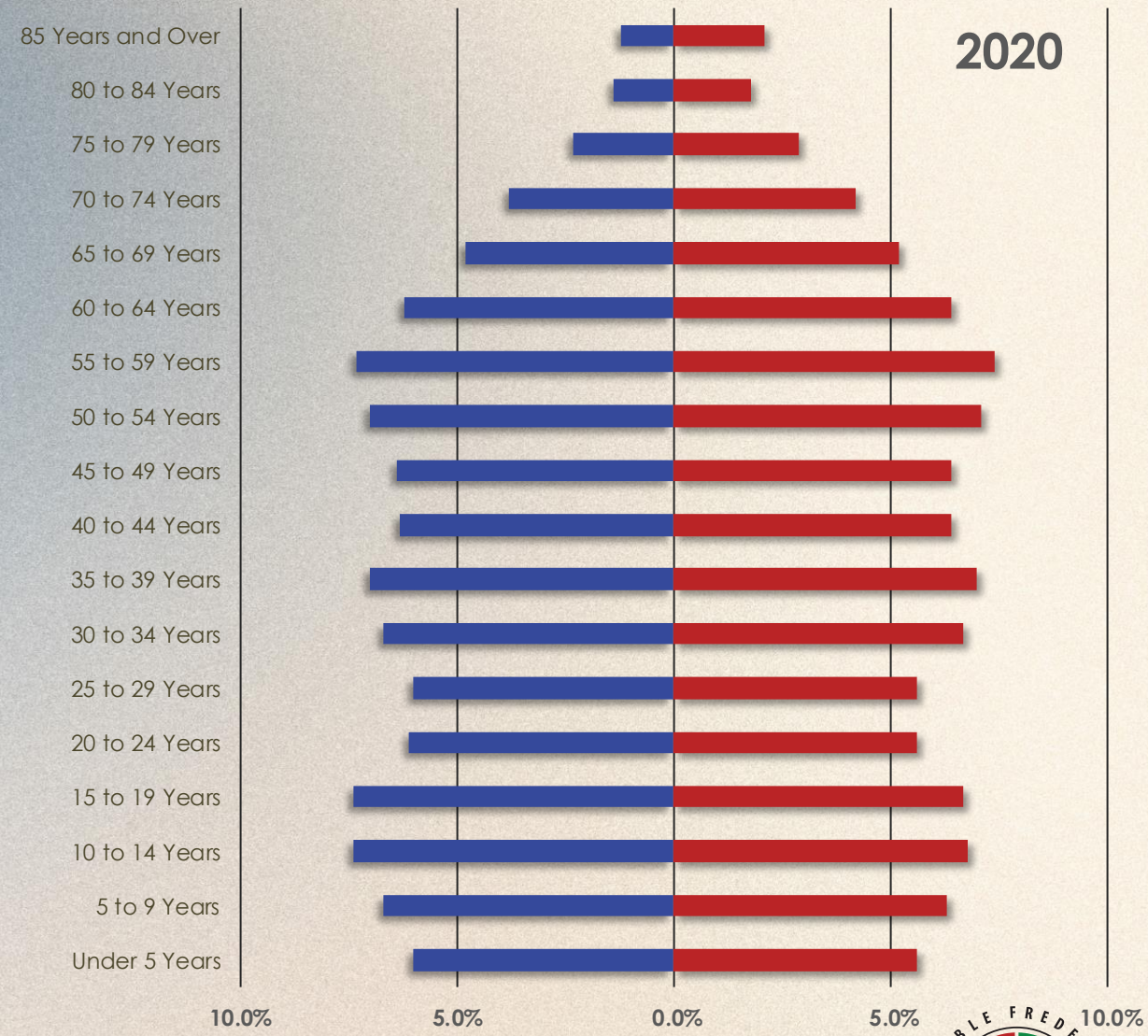
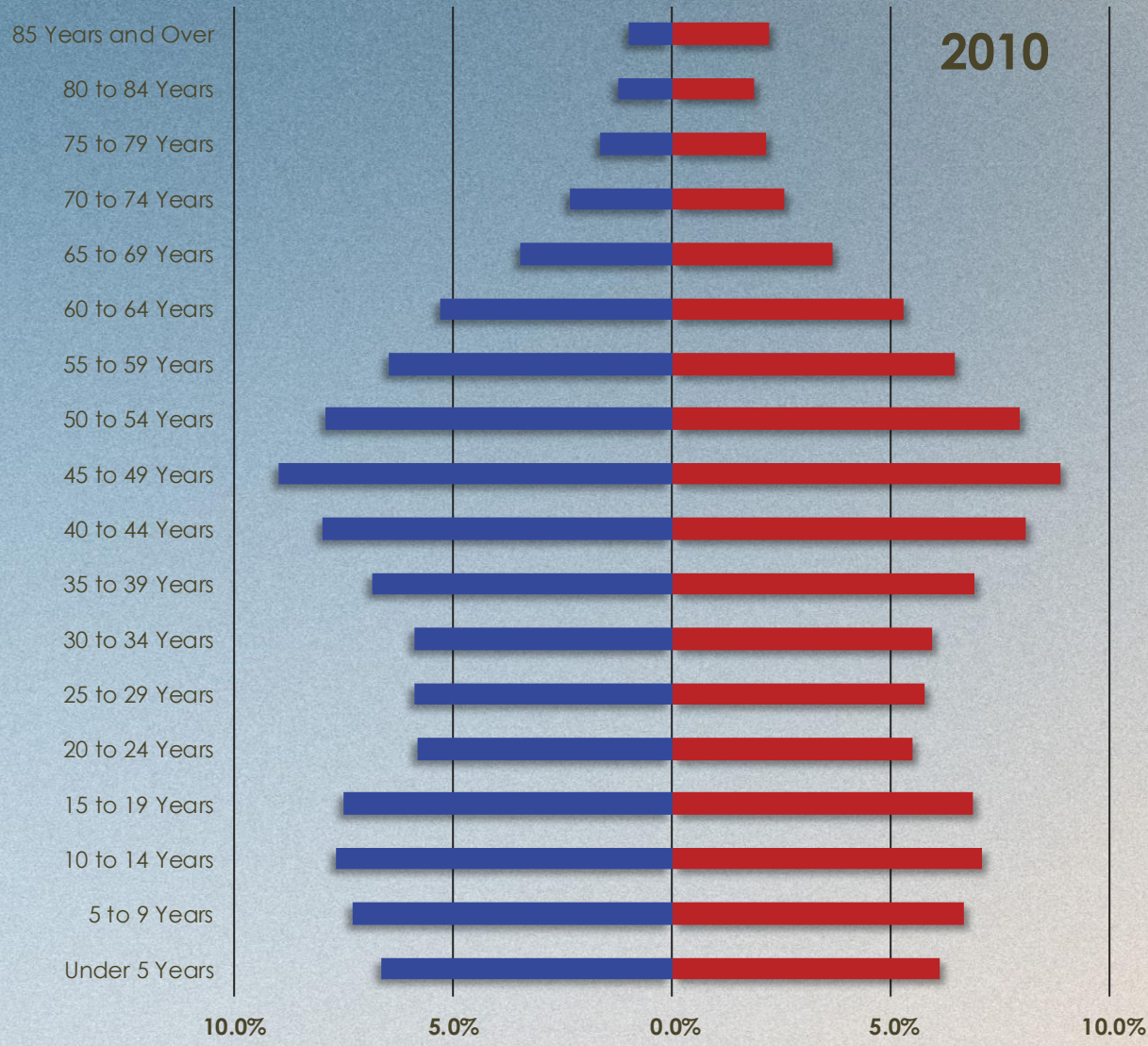
	2010	2020	% Change	ACS 5YR 2023 Est. (7/23)
<b>Total</b>	233,385	271,717	16.4%	293,391
<b>Median Age</b>	38.6	38.7	0.3%	
<b>Total Male</b>	114,806 (49.19%)	132,962 (48.93%)	15.8%	
<b>Median Male Age</b>	37.6	37.5	-0.3%	
<b>Total Female</b>	118,579 (50.81%)	138,755 (51.07%)	17.0%	
<b>Median Female Age</b>	39.4	39.8	1.0%	

United States Census Bureau



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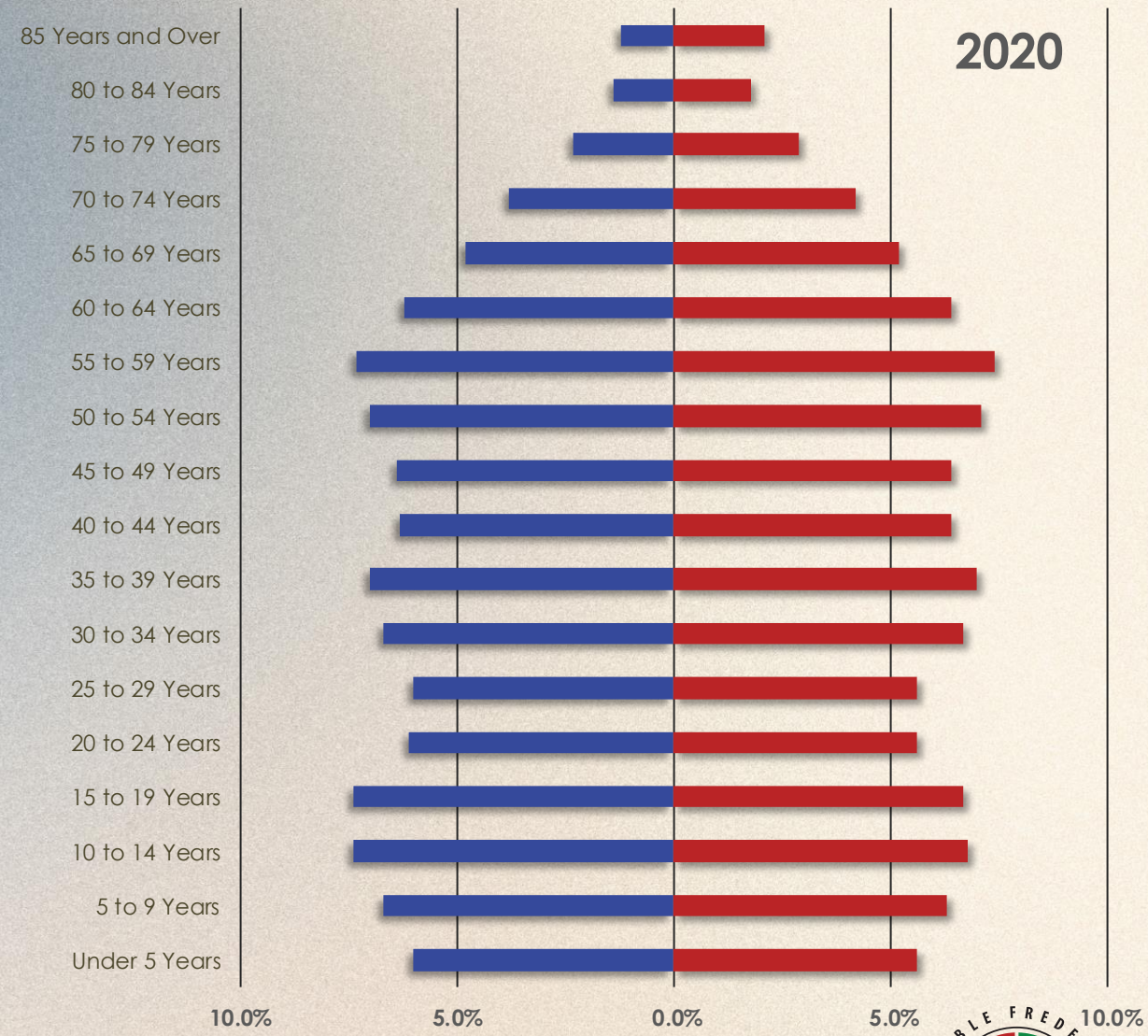
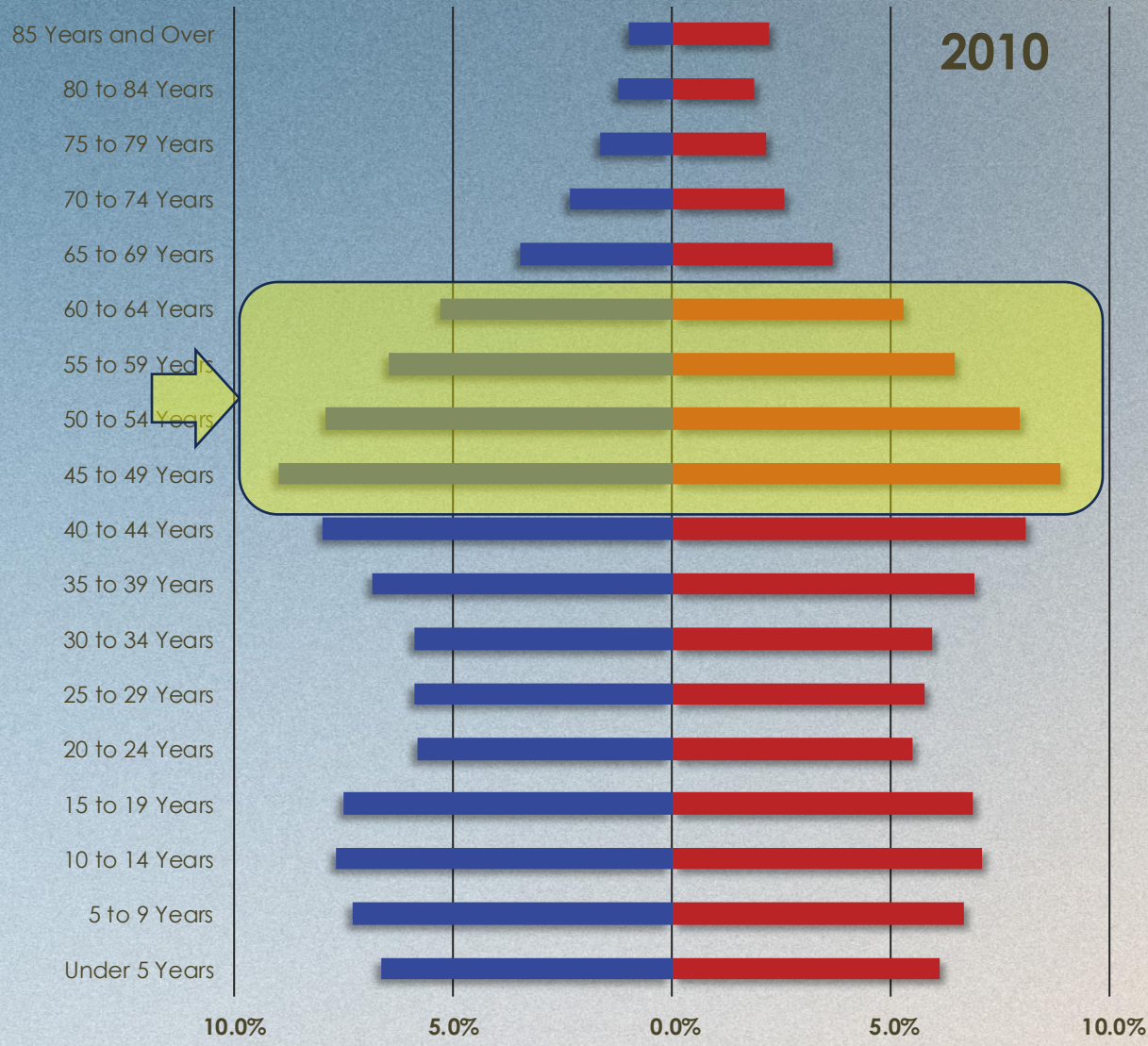
**Male**   **Female**

United States Census Bureau



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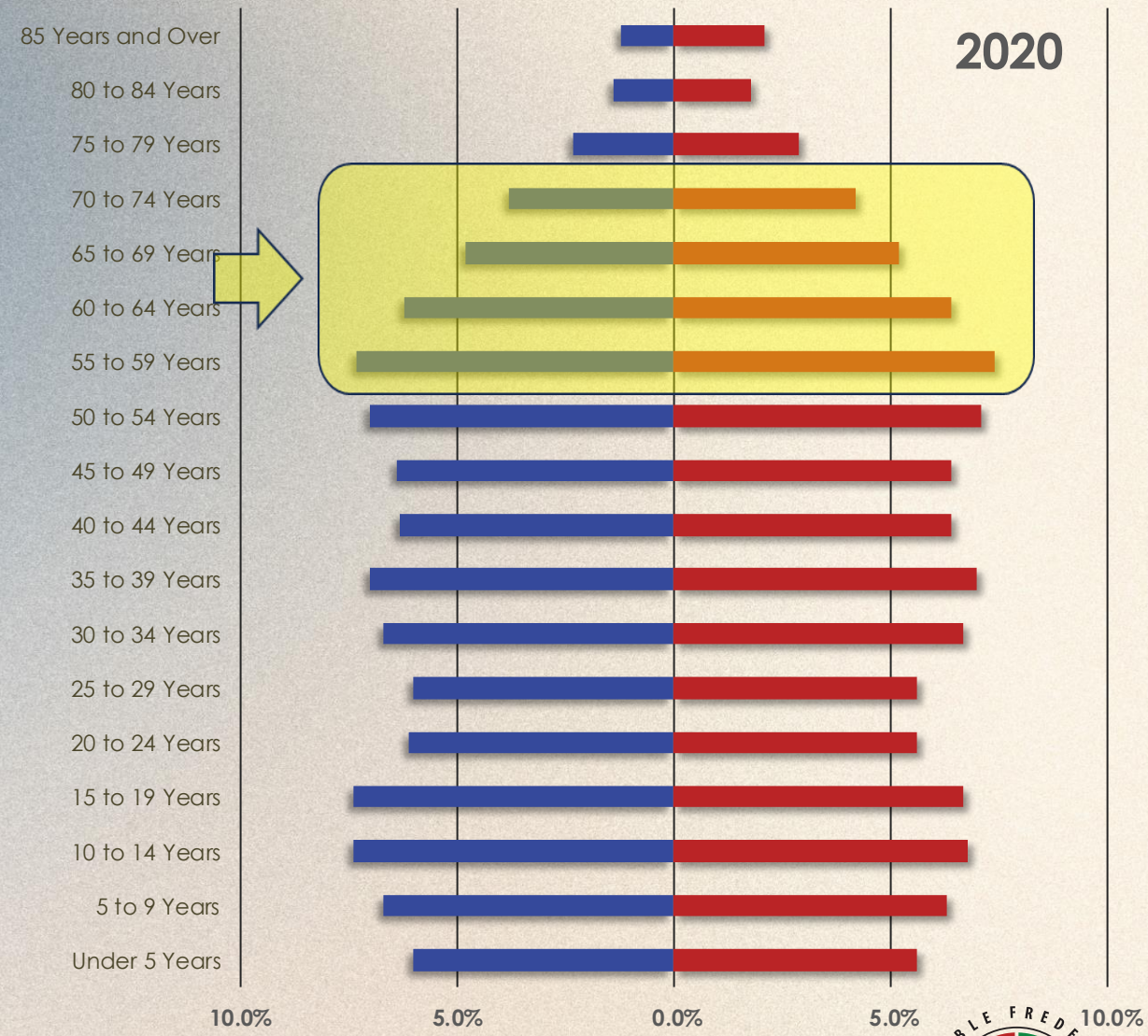
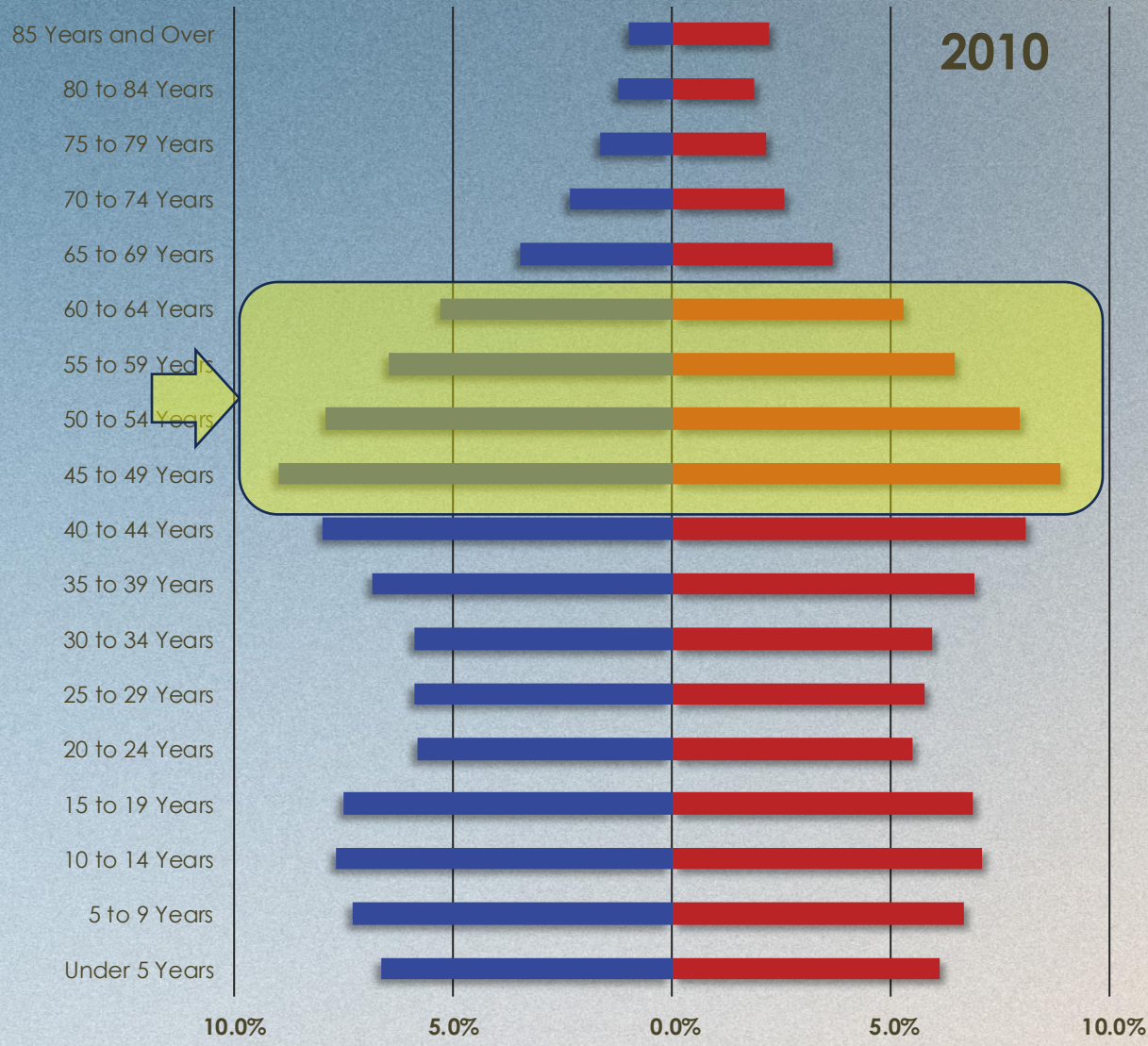
Male Female

United States Census Bureau



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Male Female

# Silent & Greatest Generations



Pre 1945

1 Dot = 10 People

ESRI Demographics: 2023



# 2020 Census: Race & Ethnicity

## Hispanic Origin

Hispanic or Latino (of any race)

**32,119** **11.8%**

## Not Hispanic or Latino

**239,598** **88.2%**

White alone

183,636 67.6%

Black or African American alone

27,007 9.9%

American Indian and Alaska Native alone

401 0.1%

Asian alone

13,427 4.9%

Native Hawaiian and Other Pacific Islander alone

154 0.1%

Some Other Race alone

1,445 0.5%

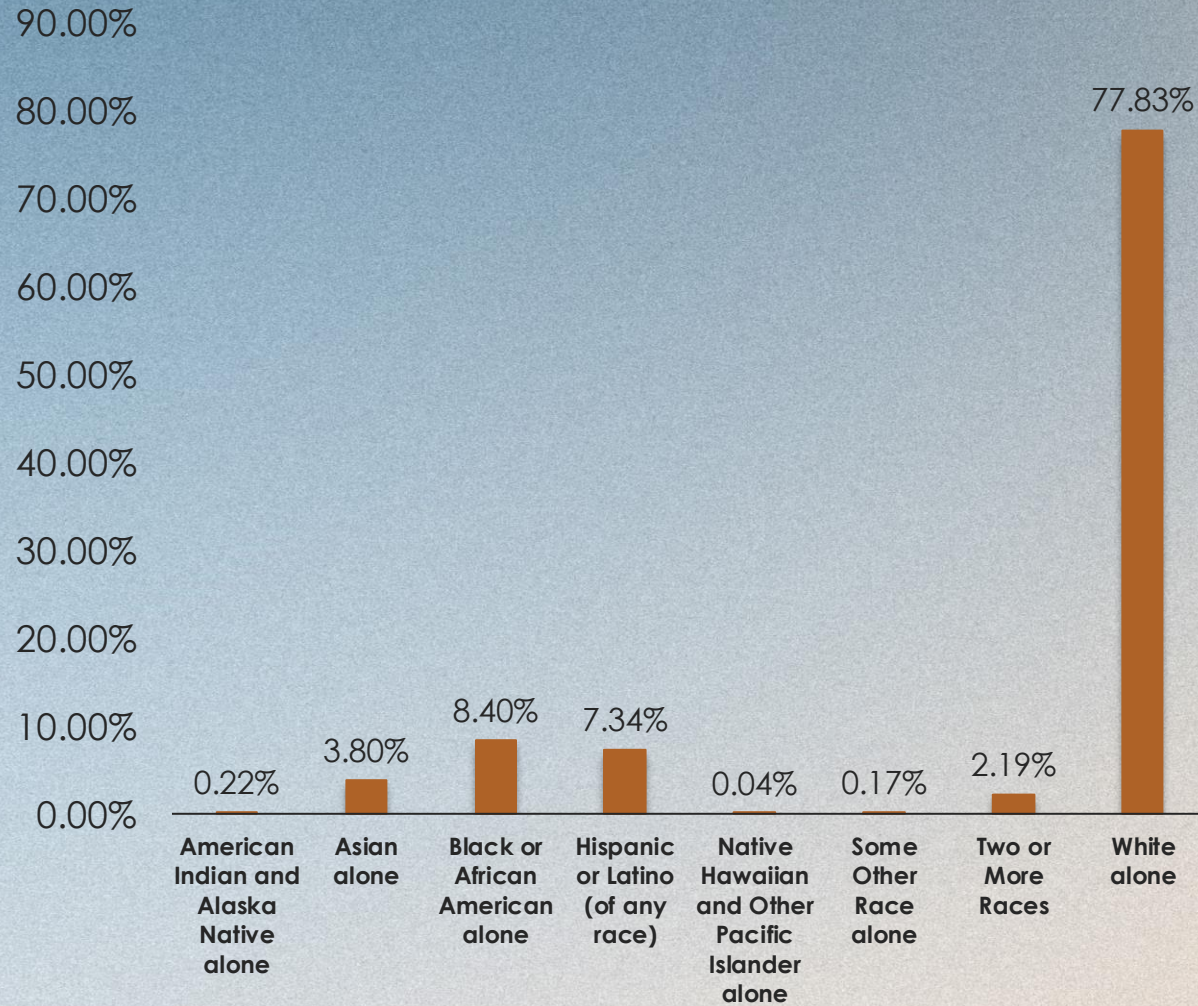
Two or More Races

13,528 5.0%

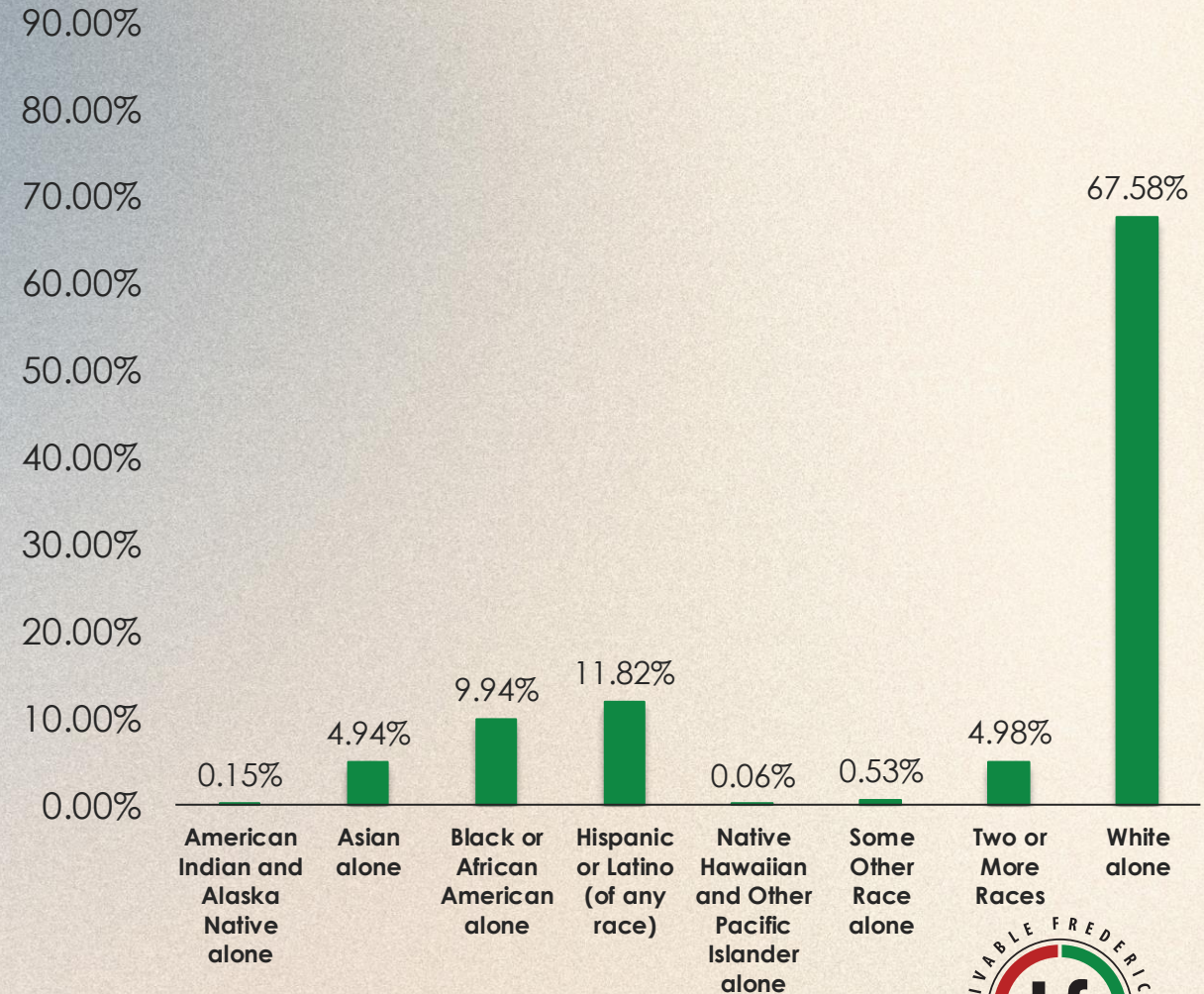
**Total: 271,717**



2010



2020



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# Housing Stock



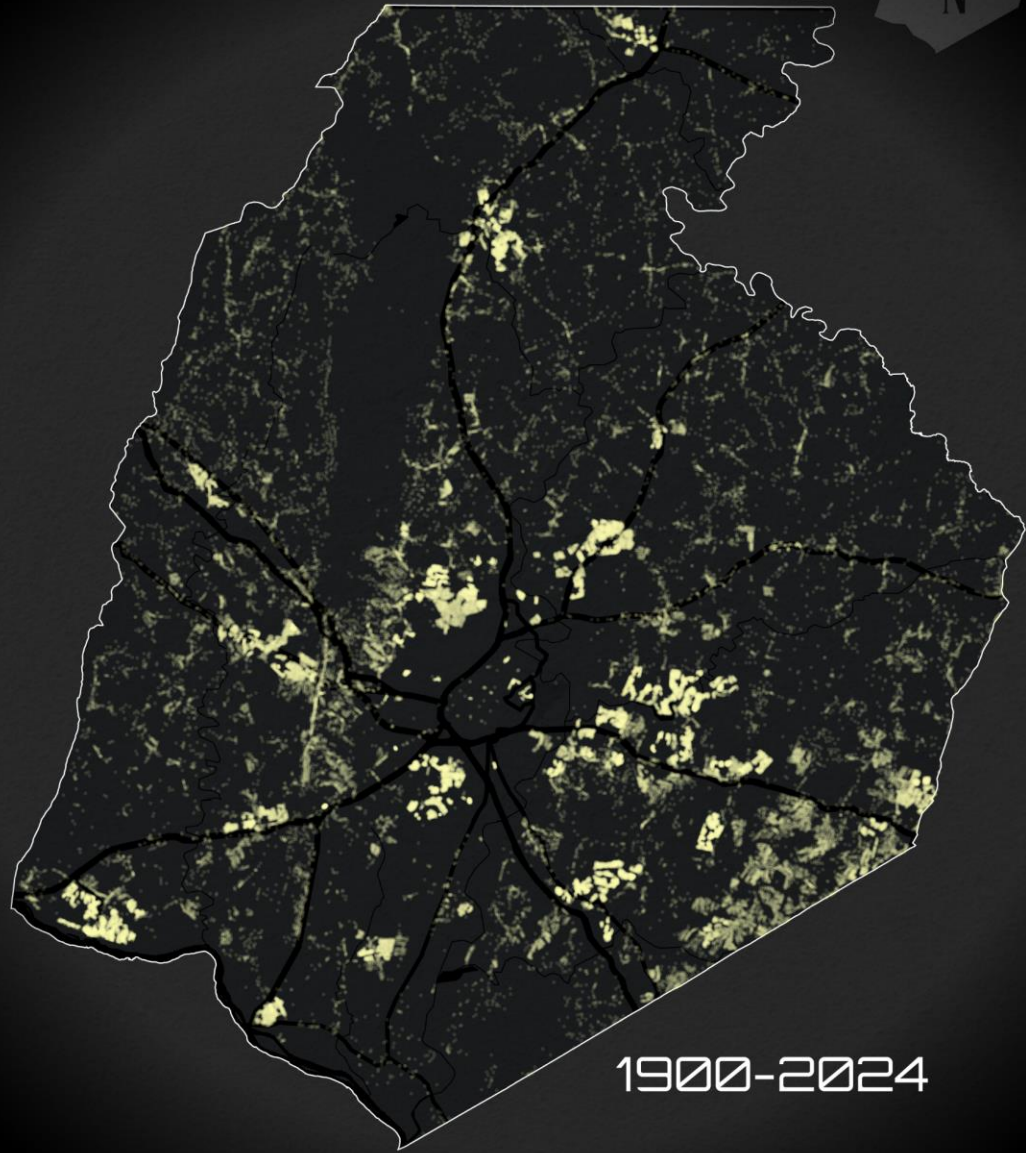
1900-1949



Frederick County Housing Inventory



Single Family



1900-2024

Frederick County Housing Inventory



# Maryland Realtors Housing Statistics 2023

Counties	Units Sold	Average Sales Price	Median Sales Price	Active Inventory	Months of Inventory*	Median Days on Market	New Listings
Carroll County	1,744	\$479,454	\$430,656	160	1.1	7	1995
<b>Frederick County</b>	<b>3,676</b>	<b>\$498,154</b>	<b>\$456,299</b>	<b>309</b>	<b>1.0</b>	<b>6</b>	<b>4313</b>
Howard County	3,365	\$623,246	\$560,000	202	0.7	6	3806
Montgomery County	9,251	\$711,104	\$580,000	633	0.8	7	10596
Washington County	1,695	\$322,818	\$302,500	214	1.5	11	2238
<b>Maryland</b>	<b>67,565</b>	<b>\$468,128</b>	<b>\$400,000</b>	<b>8,099</b>	<b>1.4</b>	<b>9</b>	<b>83,339</b>

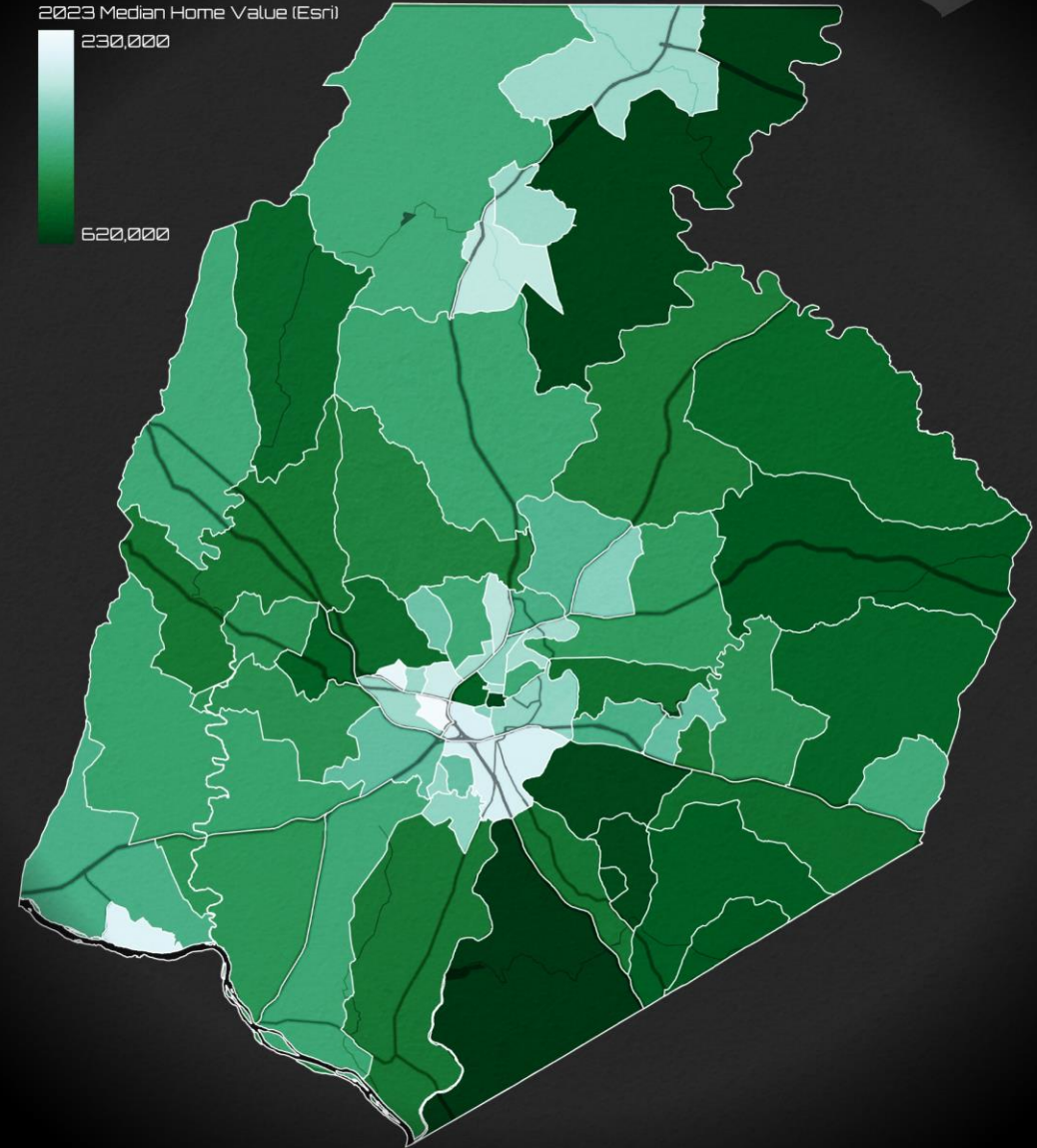




# Frederick County:

## Median Home Value

2023 Median Home Value (Esri)



Median: \$456,443  
ESRI Demographics: 2023

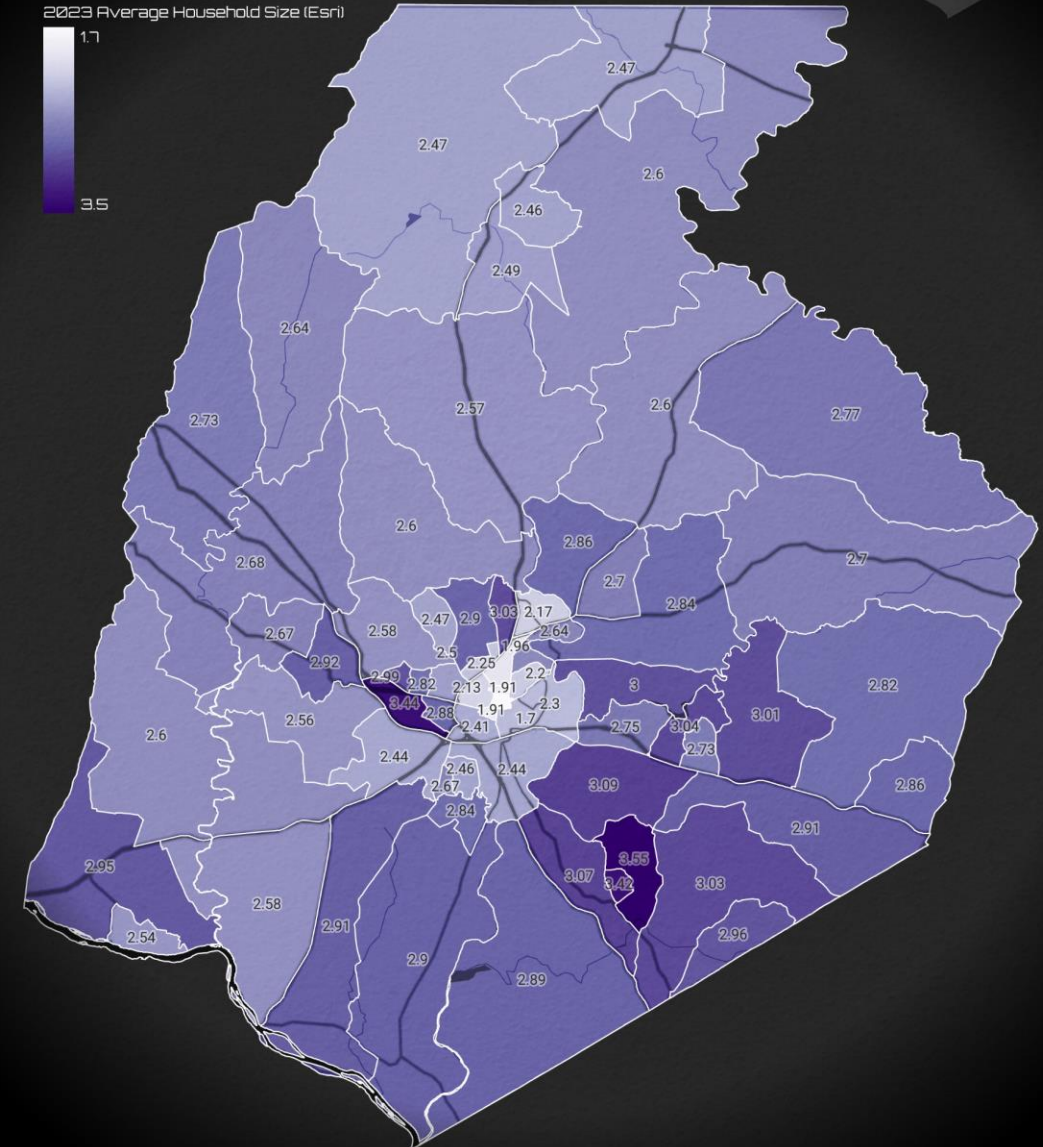


# Frederick County:

## Average Household Size



2023 Average Household Size (Esri)

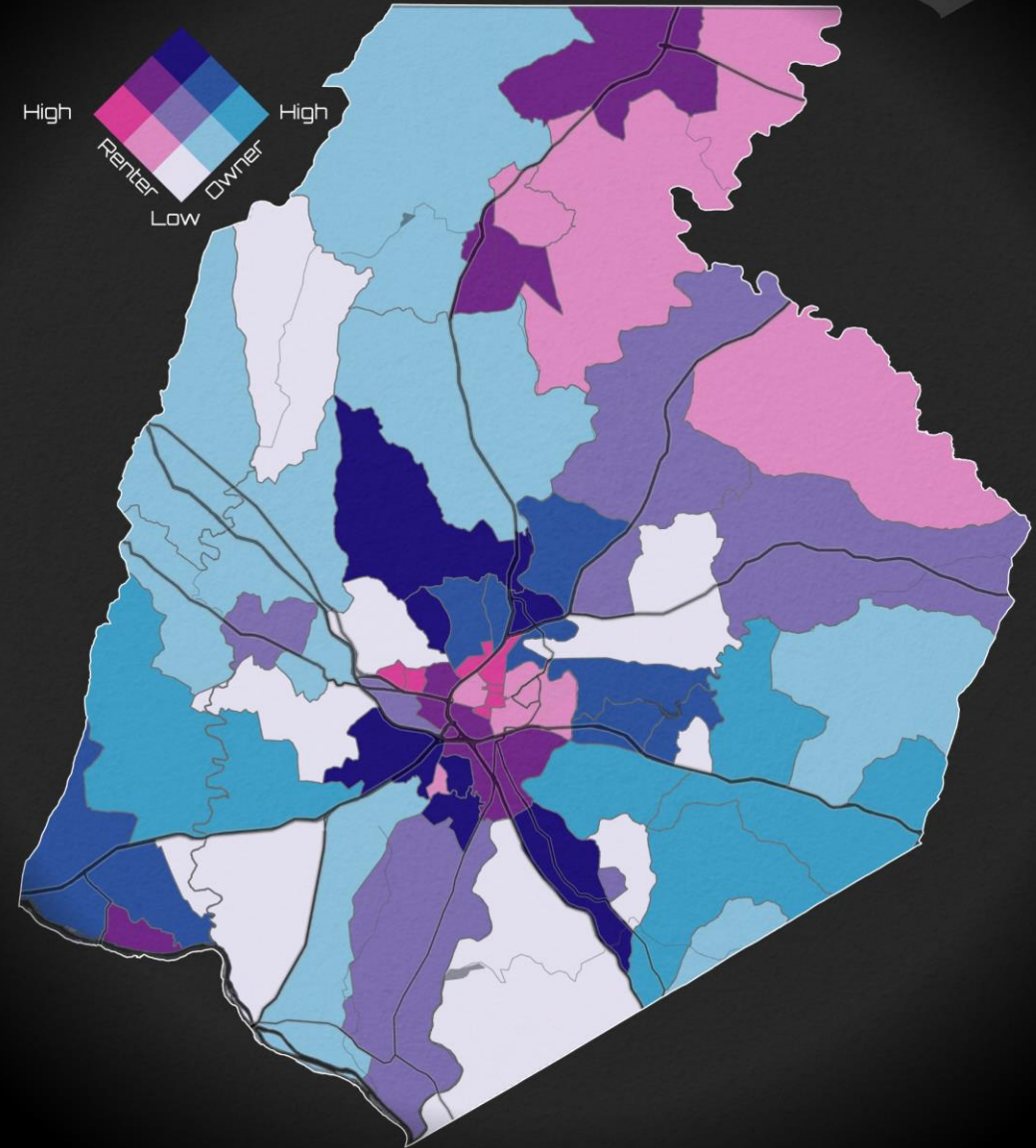


Average: 2.68  
ESRI Demographics: 2023



# Frederick County:

## Rent vs Own



ESRI Demographics: 2023



# Land Use Breakdown

Use	%	Acres
A	50.74%	217,367.00
GC	0.25%	1,077.62
GI	0.54%	2,307.44
HDR	0.06%	261.21
I	0.69%	2,966.95
LDR	3.38%	14,477.80
LI	0.52%	2,228.84
MDR	0.43%	1,824.96
MM	1.06%	4,537.99
MUN	6.76%	28,968.90
MX	0.04%	191.48
MXD	0.08%	335.10
NR	17.87%	76,529.20
ORI	0.51%	2,203.20
PO	7.35%	31,488.20
ROW	3.12%	13,363.60
RurC	0.88%	3,769.66
RurR	4.69%	20,072.10
VC	0.10%	408.83
W	0.93%	3,993.85
<b>Total</b>	<b>100.00%</b>	<b>428,373.92</b>





# Zoning Breakdown

Zone	%	Acres
A	55.33%	237,026.0
GC	0.31%	1,311.4
GI	0.64%	2,743.5
le	0.29%	1,250.8
LI	0.52%	2,222.8
MM	0.82%	3,513.9
MUN	6.76%	28,975.5
MX	0.02%	101.7
MXD	0.32%	1,355.6
ORI	0.17%	715.5
OSR	0.01%	23.9
PUD	1.78%	7,638.7
R1	5.54%	23,714.5
R12	0.02%	82.8
R16	0.01%	28.4
R3	0.85%	3,623.8
R5	0.09%	406.5
R8	0.06%	261.0
RC	22.26%	95,338.4
ROW	3.13%	13,415.0
VC	0.16%	686.2
W	0.92%	3,936.0
<b>Total</b>	<b>100.00%</b>	<b>428,371.8</b>

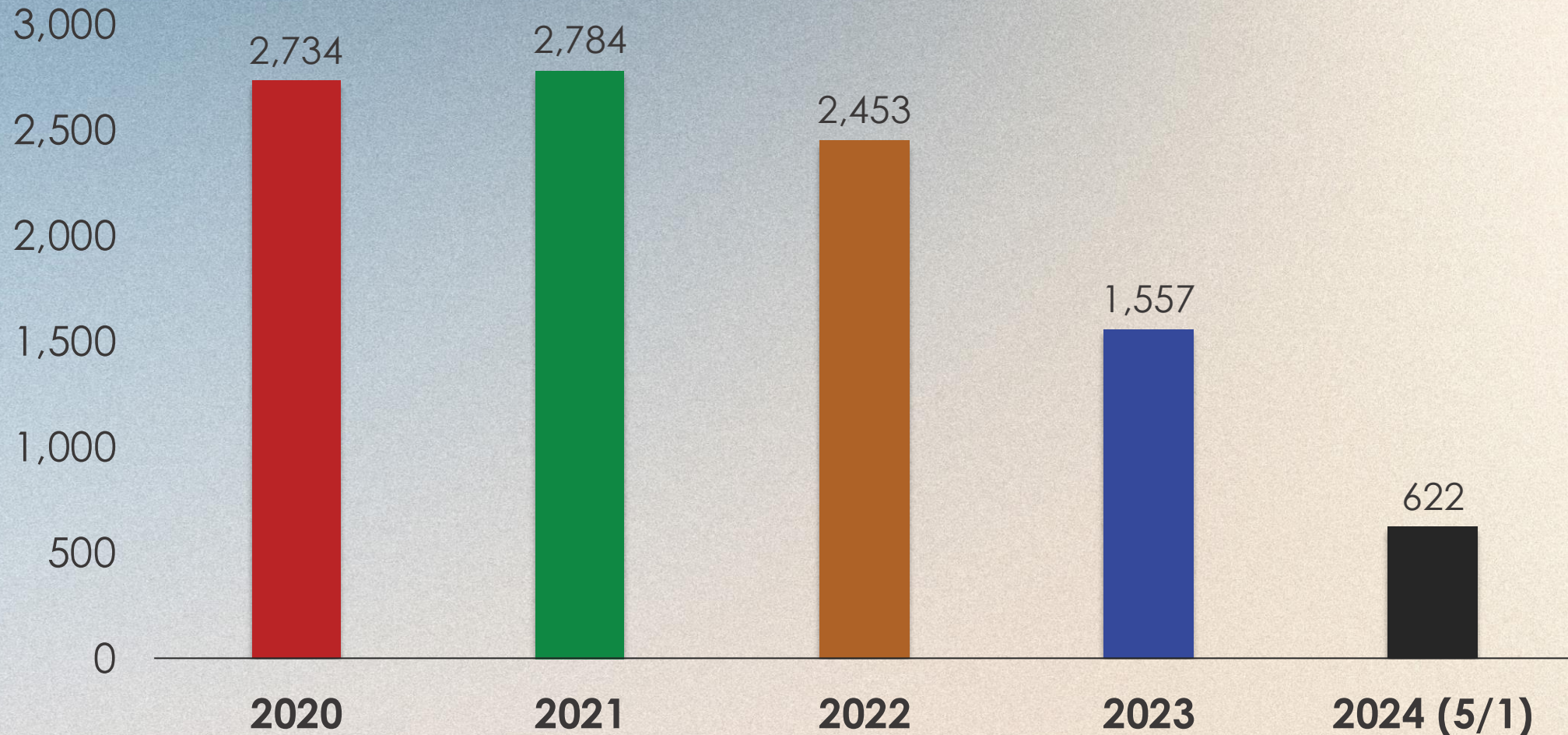


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# New Residential Permits by Year (County & Municipalities)





# 2023 Residential Plan Approvals

Minor Subdivisions

**Total**

9

Major Subdivisions

25

Total Approved Units

1,843



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# 2023 Commercial Approvals

## Site Plans (County-Only)

	Total
Total # of Commercial Site Plans Approved	18
Gross Acres of All Approved	304
Gross Building Area Approved in Square Feet	1,668,869

## Building Permits

Total Commercial Building Permits Issued	17
Gross Building Area Constructed in Square Feet	229,050



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# Residential Pipeline as of 4/1/24

	Approved Units	Recorded Lots	Permitted Units	Available Units
Municipal Subdivision	15,781	1,402	5,346	10,435
County Major Subdivision	16,542	11,616	11,215	5,327
Countywide Total	32,323	13,018	16,561	15,762



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# Strengths:

- Diversity of Employment Opportunities – broad range of employers in a variety of sectors
- Zoning Overlay Districts are not overused (provides more regularity in application of codes)
- County achieves Preservation/Conservation Goals in part by planning for robust growth and development where and when appropriate
- Water and Sewer Infrastructure is basically sound for the foreseeable future; overall system capacity is generally good, but with some conveyance limitations, and constraints in certain municipal systems





# Strengths:

- Our municipalities have distinct personalities, offering a range of current and potential economic growth options
- The South Frederick Corridors Area lacks significant NIMBY forces that could hold back redevelopment
- The Livable Frederick Master Plan: Strategic, Flexible, Diagrammatic, Nimble...”big decisions have already been made”
- Regional Locational Advantage – County is connected to the seat of Federal power (\$\$\$), and benefits from the investments made in surrounding jurisdictions (as well as our own) to establish a significant base of non-governmental employers



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# Strengths:

- Transportation connections are mostly good or adequate and provide a fertile environment for reinvestment
- Prime farmlands are in active agricultural use, with tens of thousands of acres permanently protected from non-farm development
- Generational population shifts are projected to hold steady against a national 'Silver Tsunami', with the percentage of residents aged 65 & older rising from the current 18% to approximately 22% in 2045... Residents aged 20 to 64 will likely decrease by that same 4% margin [MDP 2021]
- Existing progressive cultural advantages offer an opportunity to retain and attract younger adults (labor force succession)





# Weaknesses:

- The ORI (office/research/industrial) Zoning District is an obstacle to, rather than an incentive for, the development of land for employers
- The use categories in County codes need revision/updating to better reflect the changing needs small and large businesses; home-based business/farm-based business options are lacking flexibility
- The County approach to resolving 'Change of Use' requests (via the Site Plan review process) results in costly time delays for transitioning and evolving businesses
- Existing reliance on a prescriptive Table of Uses limits flexibility; administrative approvals are largely absent from codes (need administrative latitude)



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# Weaknesses:

- Regulatory enforcement is perceived as arbitrary
- Reasonable requests for regulatory flexibility require time-consumptive processing
- Zoning codes lack sufficient flexibility...perhaps consider more 'Optional Methods of Development'
- Displacement of certain small to mid-size businesses continues with growth in and around the City of Frederick; jurisdictions have not kept up with the demand for appropriately-zoned lands for contractors, limited industrial, users requiring outdoor storage, equipment storage, etc





# Weaknesses:

- Agricultural preservation interfering with planned growth areas – ‘enclaving’; Priority Preservation Area between Walkersville and Frederick is restricting growth opportunities there
- County’s history of low density sprawl development patterns creates need to better educate citizens about the benefits of more compact planned growth
- The County lacks a proactive strategy regarding water and wastewater capacity; regular and consistent analysis that would enhance early identification of deficiencies in the existing networks, including potential wastewater flow monitoring and/or water pressure zone assessments (eg, flow-metering for public sewer lines) is needed in order to provide a clearer picture of the state of our critical infrastructure



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# Weaknesses:

- Existing Water/Sewer Service Area designations are a cumbersome, unnecessary time-killer; water and sewer service designations should be threshold factors....YES or NO
- Insufficient support to municipal planning efforts (including administrative supports); outside of City of Frederick, staffs are strained
- Insufficient local workforce for several sectors; reliance on external workers is a stressor for both employees and employers (turnover, training costs, wasted commuting time)
- Entitlement and approval processes take too long; 'Need for Speed'





# Weaknesses:

- Mismatch between housing type and needs of workforce; general lack of affordable options, limited supply
- County and Municipal growth plans not universally in-synch; should be incentivized for balanced growth outcomes
- Some municipalities do not want to grow/change
- County is not taking advantage of potential for TDR (but difficulty remains with cross-jurisdictional approach)
- Losing younger workforce





# Broad Categories:

- **Regulatory (10)**
- Employer Characteristics
- **Long-range Planning Policy (8)**
- **Infrastructure (5)**
- Character/Personality
- **Municipal Factors (5)**
- Regional Geography
- Demographic Factors
- Educated Citizens & Leadership
- Demographic Factors
- Workforce
- Housing & Livability



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