

Demographic, Housing, & Permits Trends



Division of
Planning and Permitting

Frederick County
Government Maryland

MWCOG: 10.0 Population

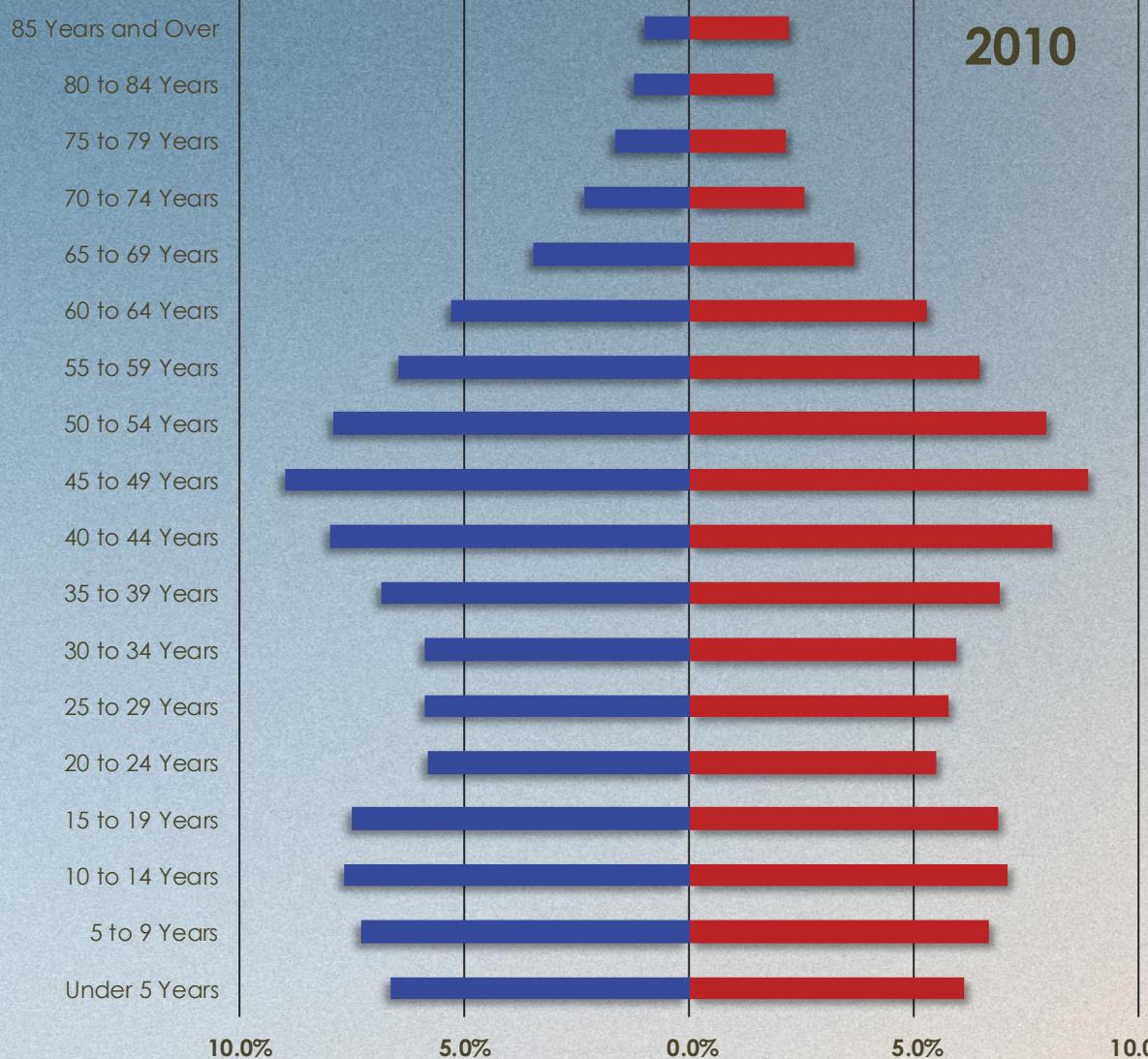
2020 to 2050
Growth

JURISDICTION	2020	2025	2030	2035	2040	2045	2050	#	%
Frederick County	271.7	293.2	316.3	341.3	368.3	397.4	428.8	157.1	57.8%
City of Frederick (2)	78.2	83.8	89.5	95.1	100.8	106.4	112.0	33.9	43.3%
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%
Inner Suburbs	3,239.1	3,326.5	3,449.1	3,573.3	3,688.1	3,795.0	3,891.2	652.1	20.1%
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%



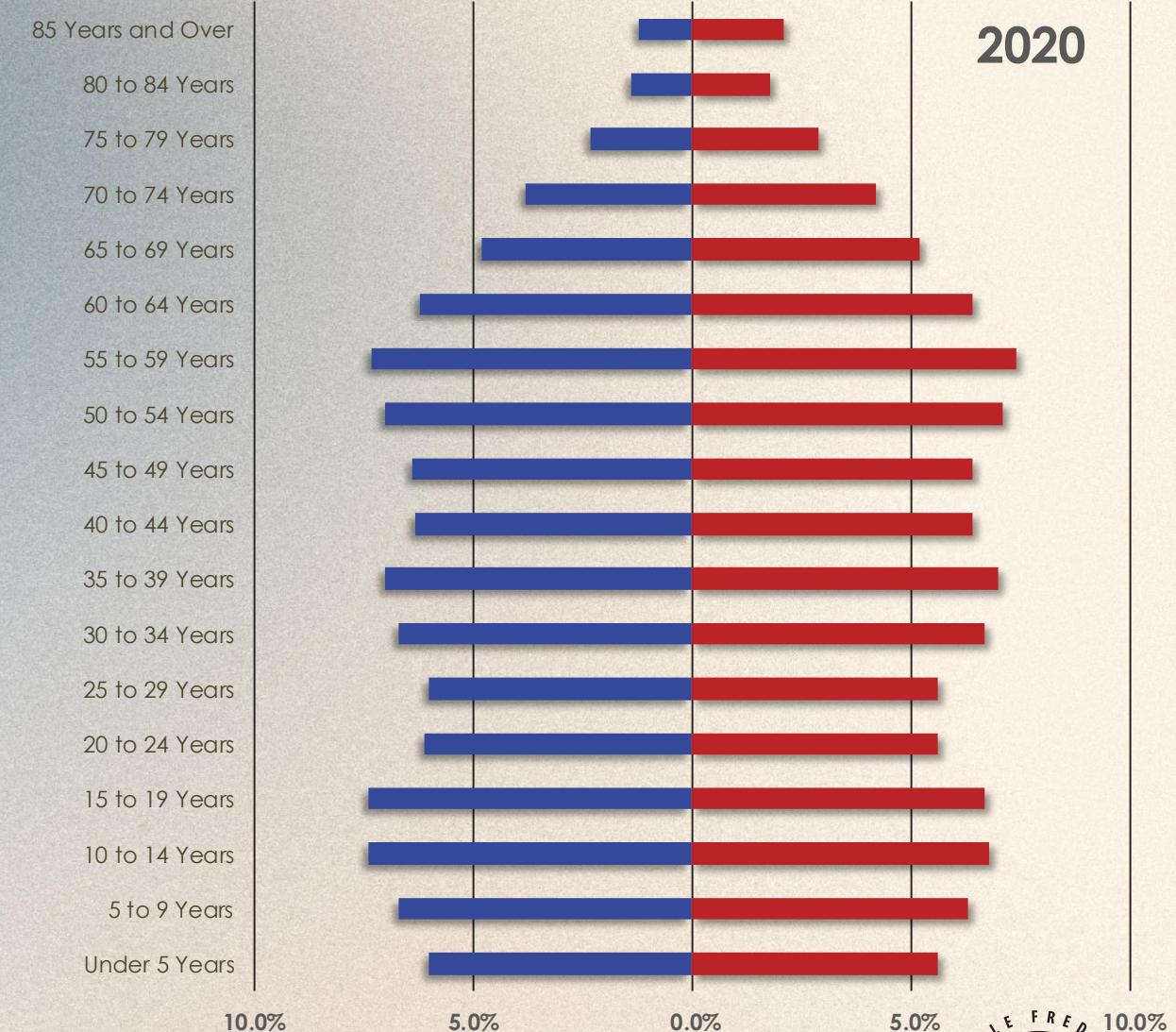
Census: Population Totals

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

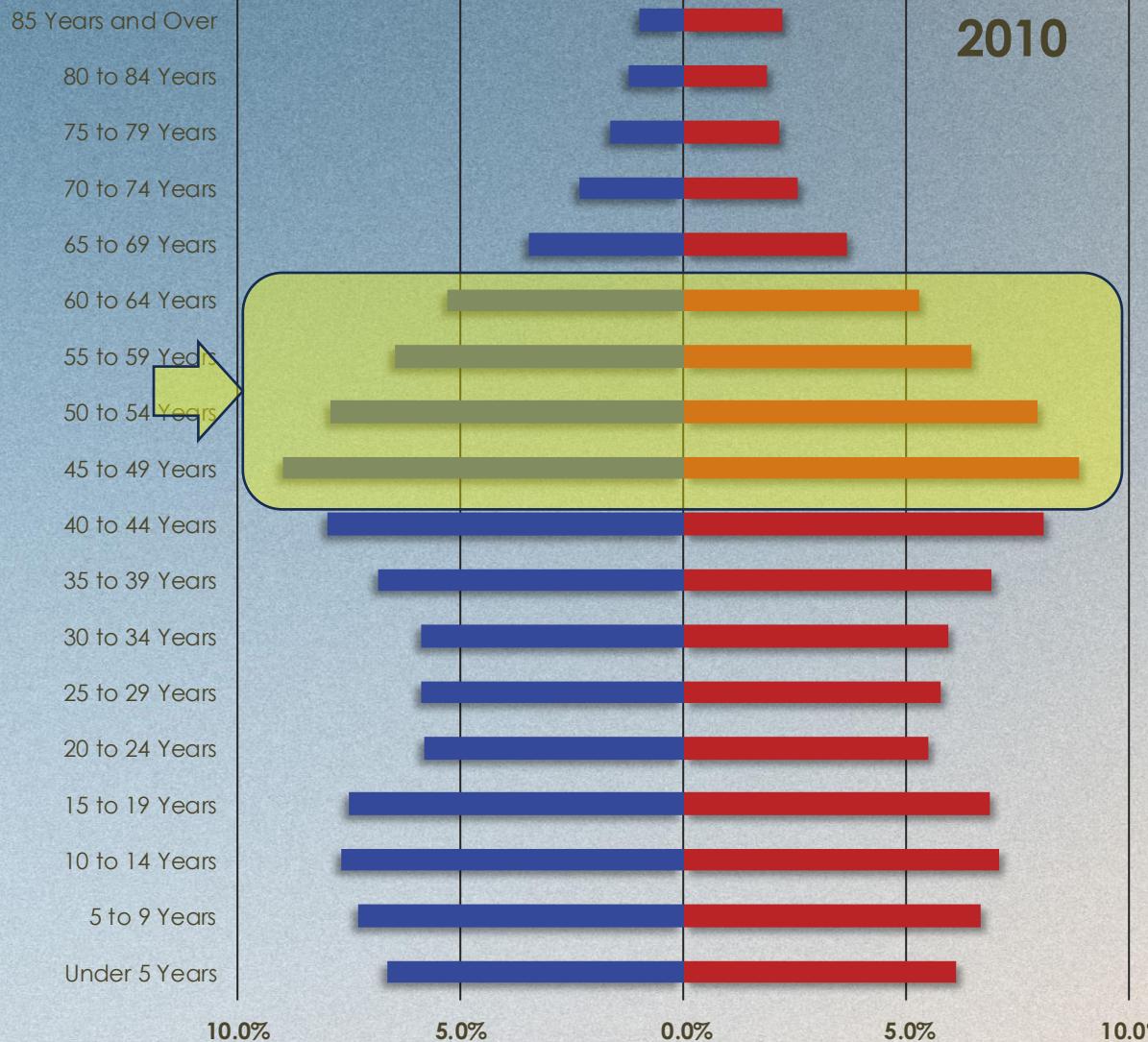


Male Female

United States Census Bureau

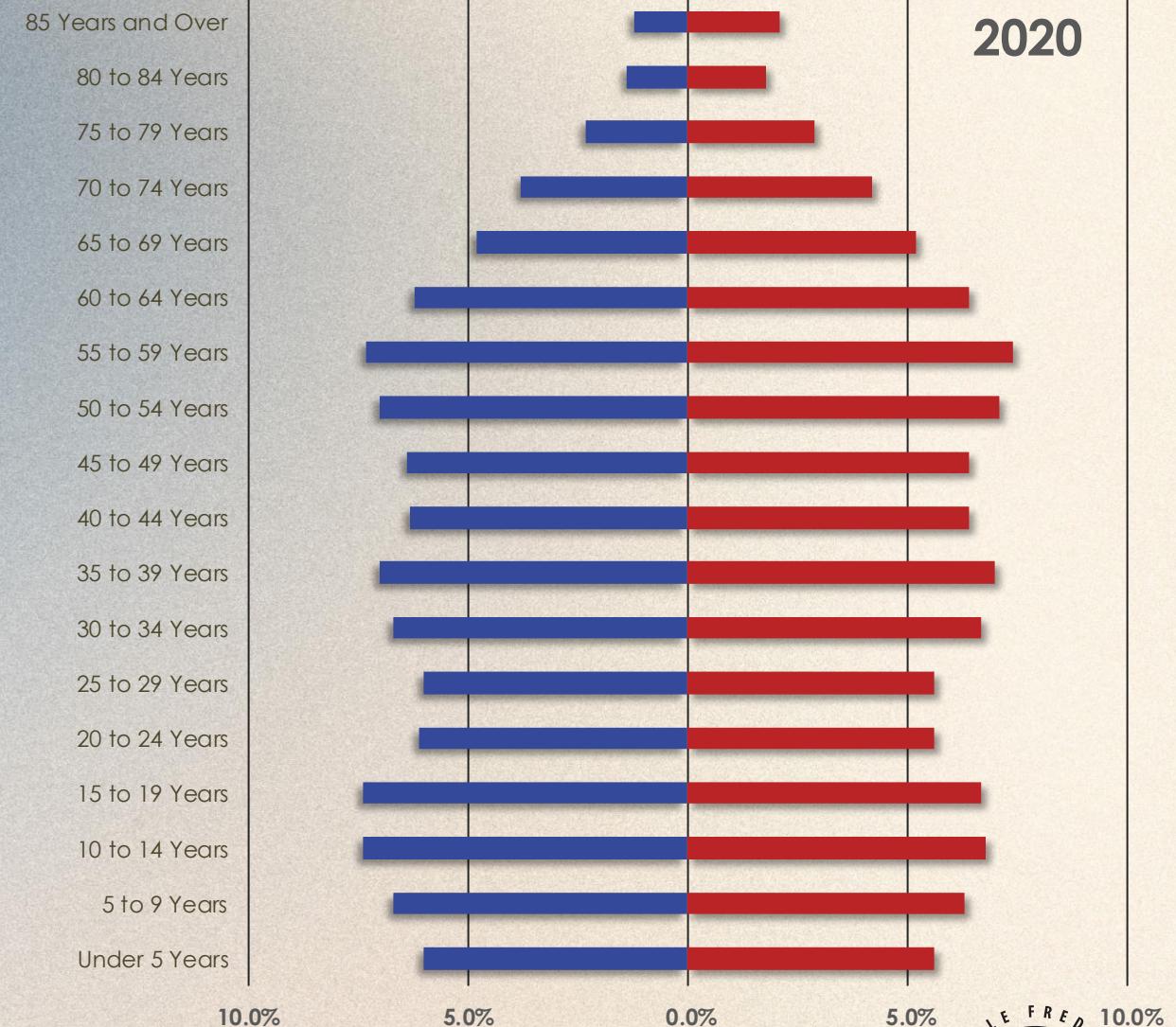


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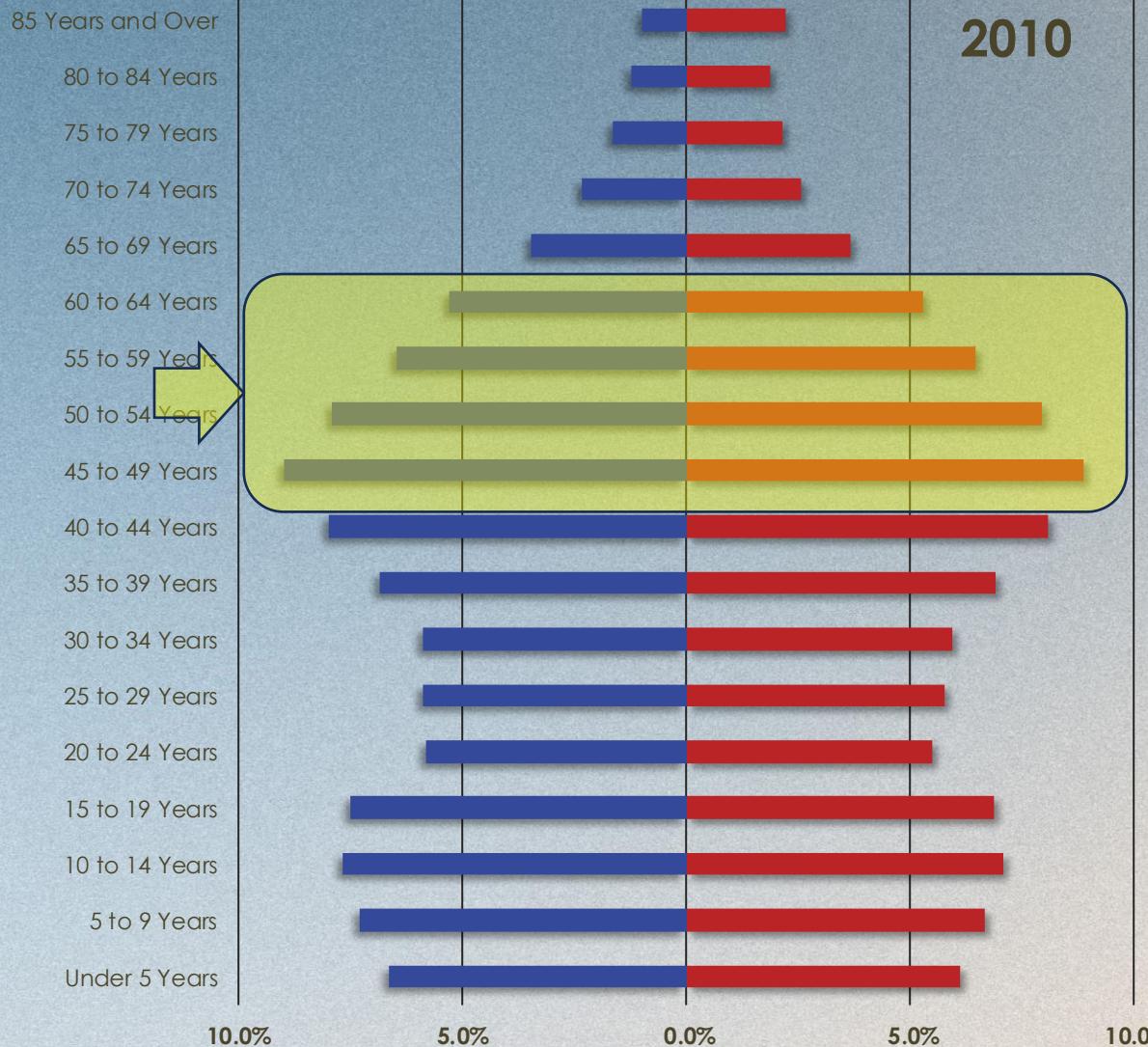


Male Female

United States Census Bureau

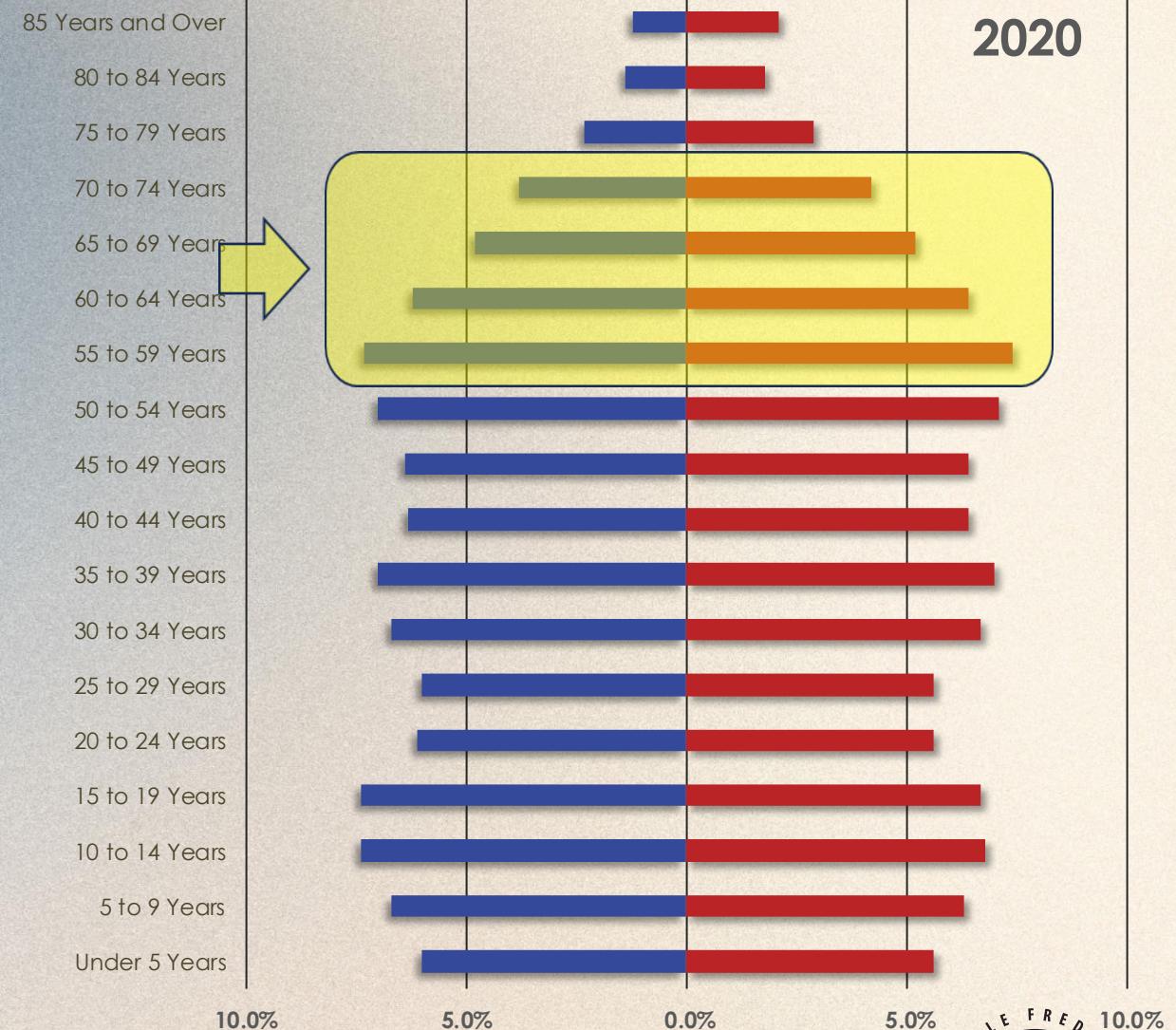


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Male Female

United States Census Bureau



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ESRI Demographics: 2023

Silent &
Greatest Generations



1 Dot = 10 People

2020 Census: Race & Ethnicity

Hispanic Origin

Hispanic or Latino (of any race)	32,119	11.8%
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Not Hispanic or Latino

White alone	183,636	67.6%
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Black or African American alone	27,007	9.9%
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American Indian and Alaska Native alone	401	0.1%
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Asian alone	13,427	4.9%
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Native Hawaiian and Other Pacific Islander alone	154	0.1%
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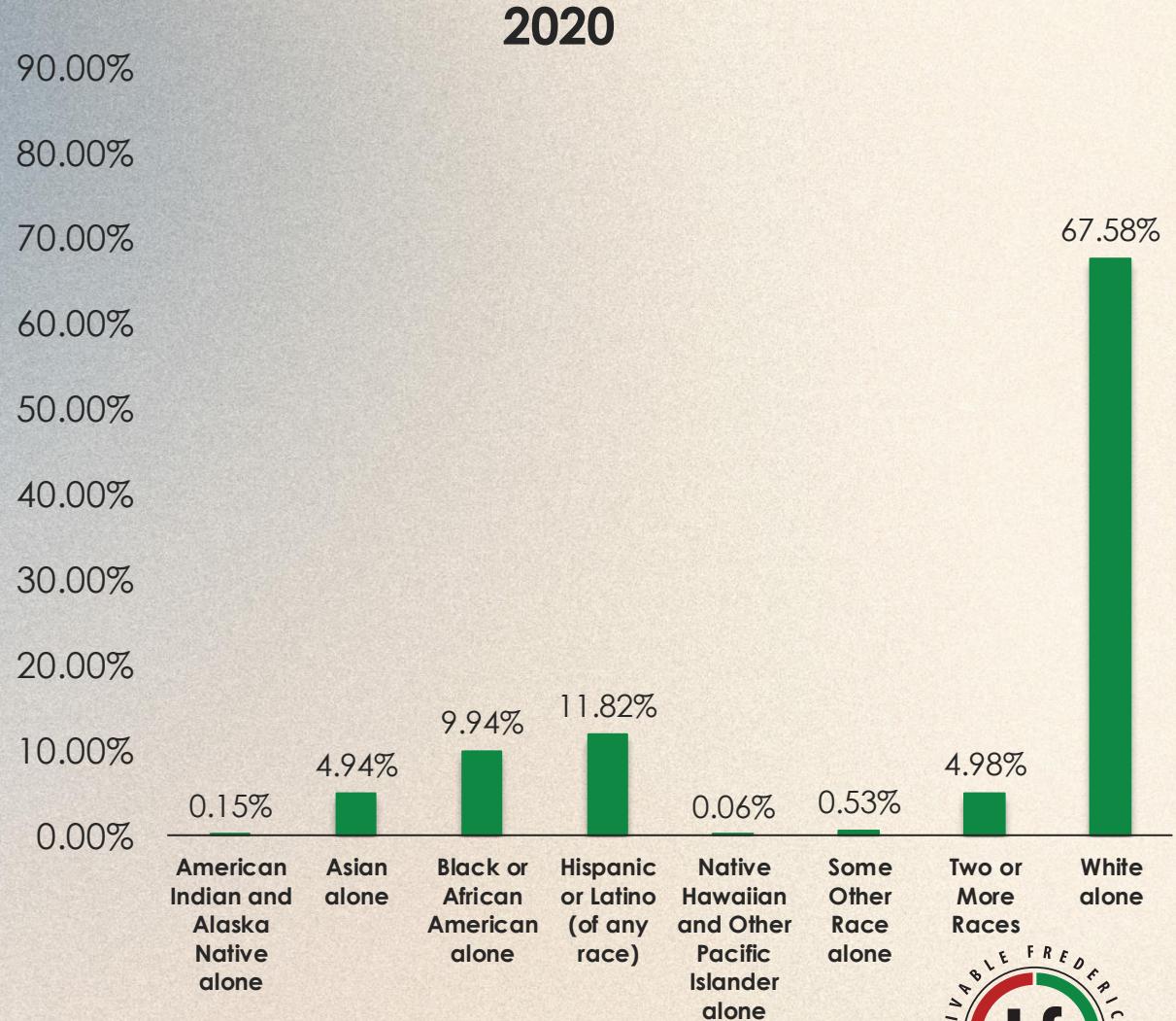
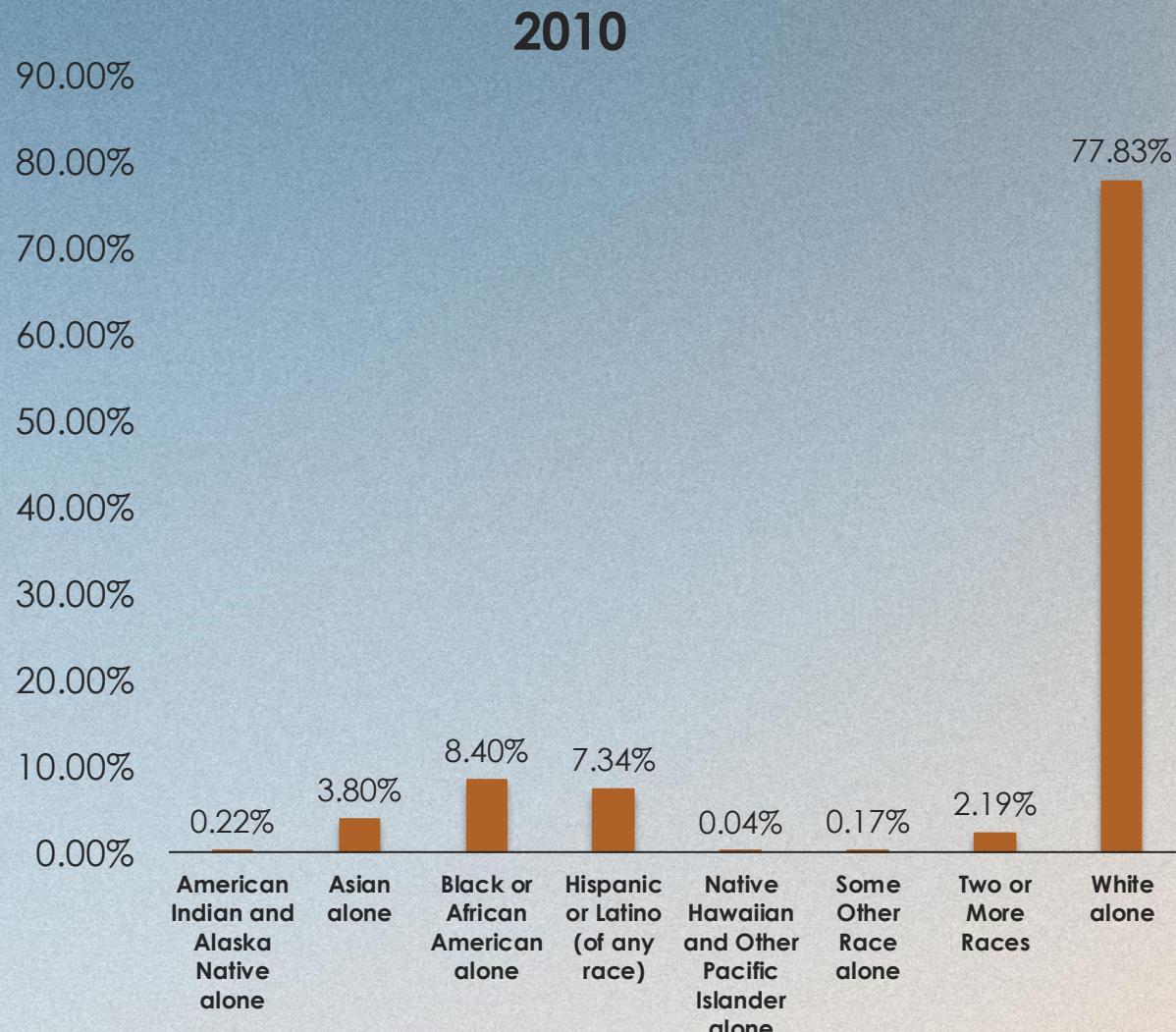
Some Other Race alone	1,445	0.5%
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Two or More Races	13,528	5.0%
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Total: 271,717



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United States Census Bureau



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Housing Stock

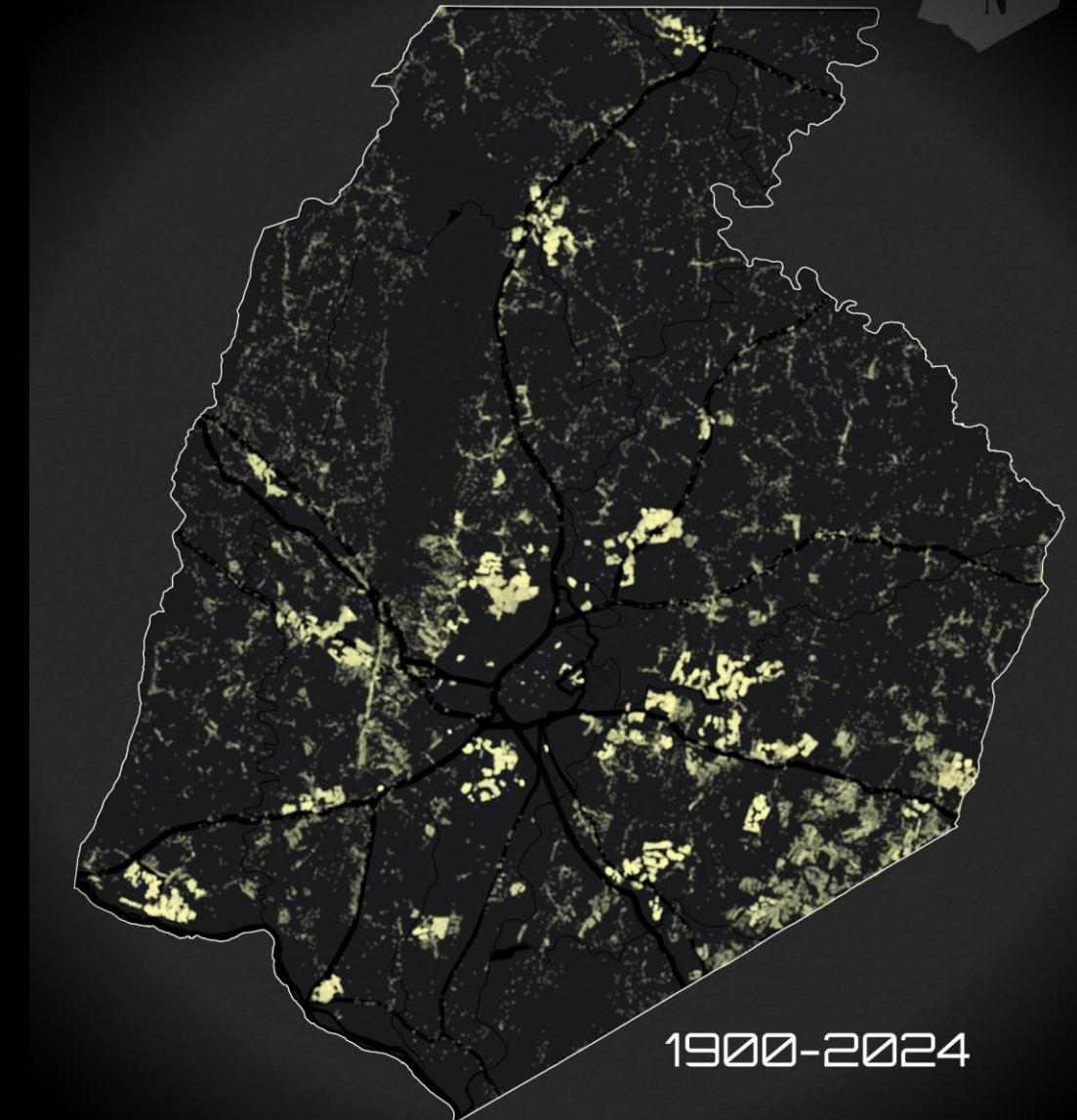
1900-1949



Frederick County Housing Inventory

Frederick County Housing Inventory

Single Family



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
Frederick County	3,676	\$498,154	\$456,299	309	1.0	6	4313
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
Maryland	67,565	\$468,128	\$400,000	8,099	1.4	9	83,339

Frederick County:

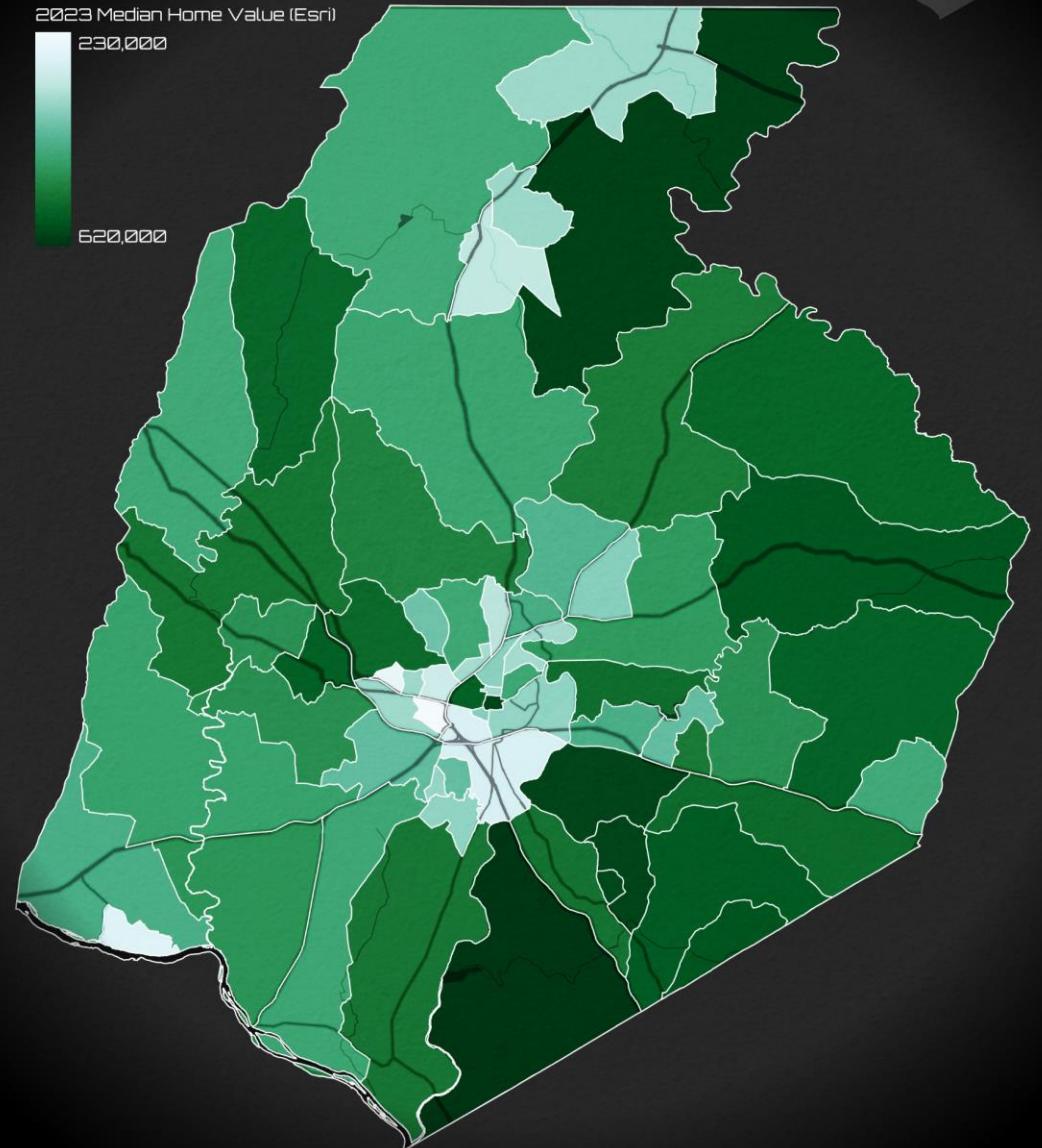


Median Home Value

2023 Median Home Value (Esri)

230,000

620,000



Median: \$456,443

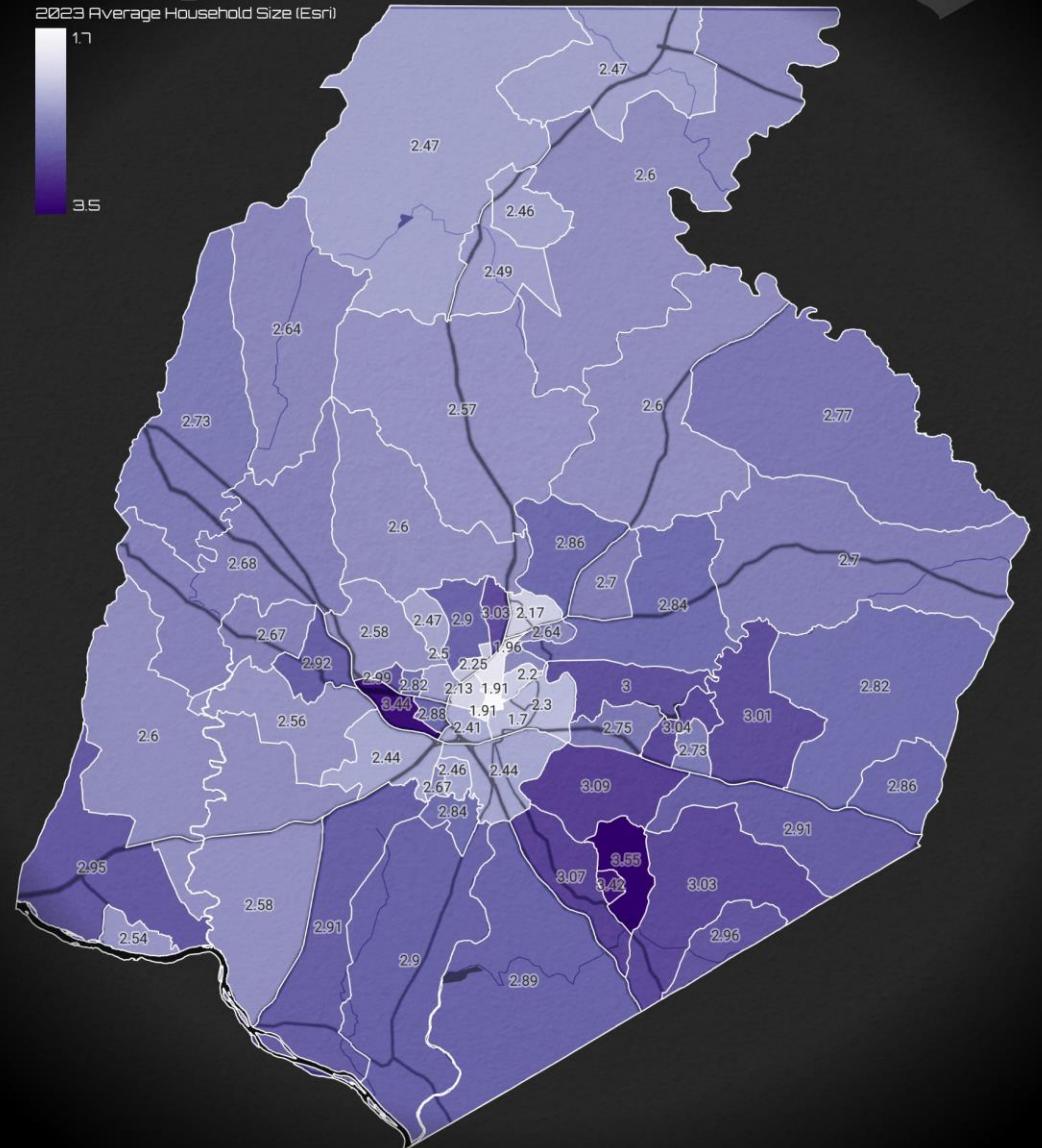
ESRI Demographics: 2023

Frederick County:

Average Household Size



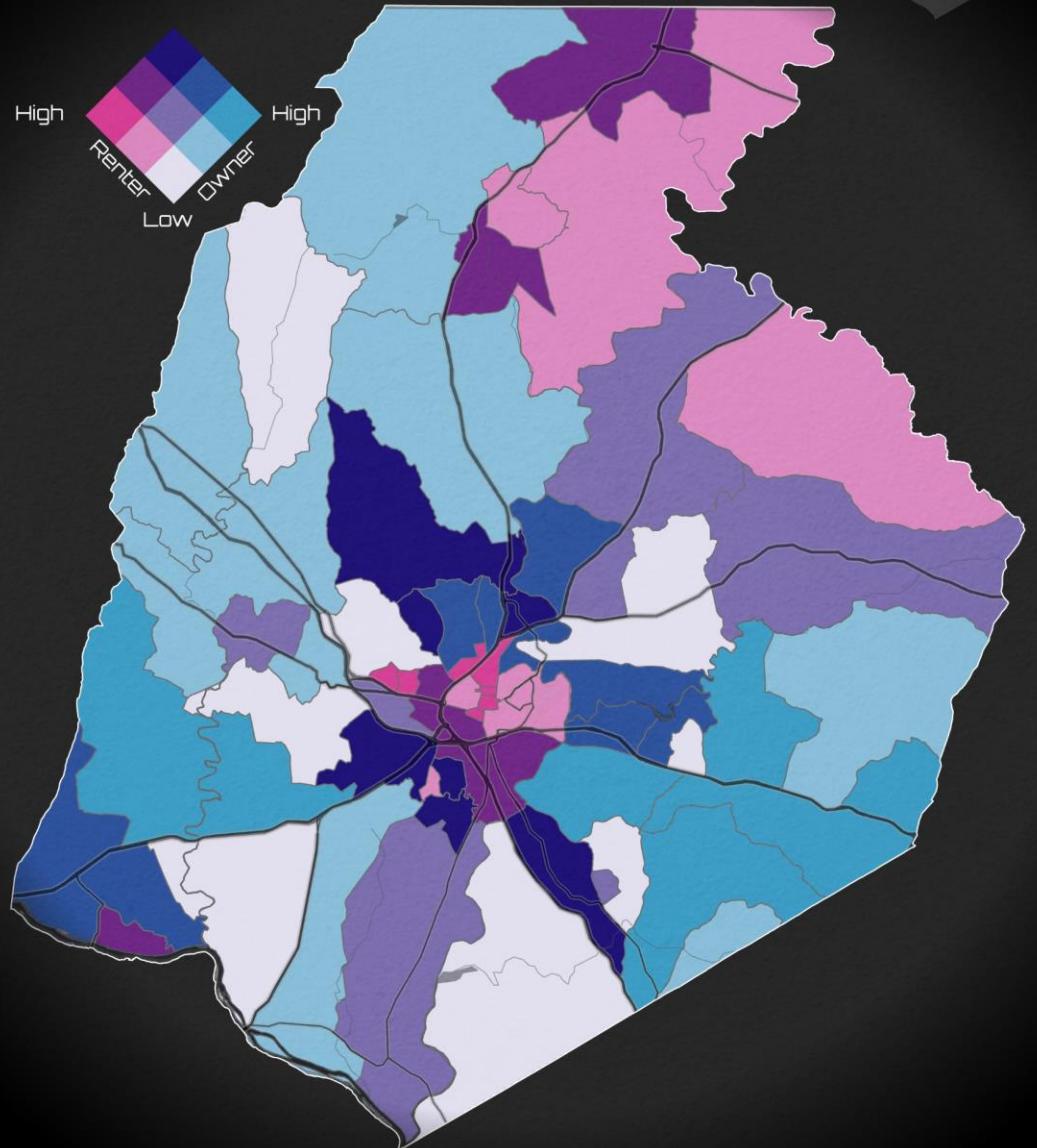
2023 Average Household Size (Esri)



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
Total	100.00%	428,373.92

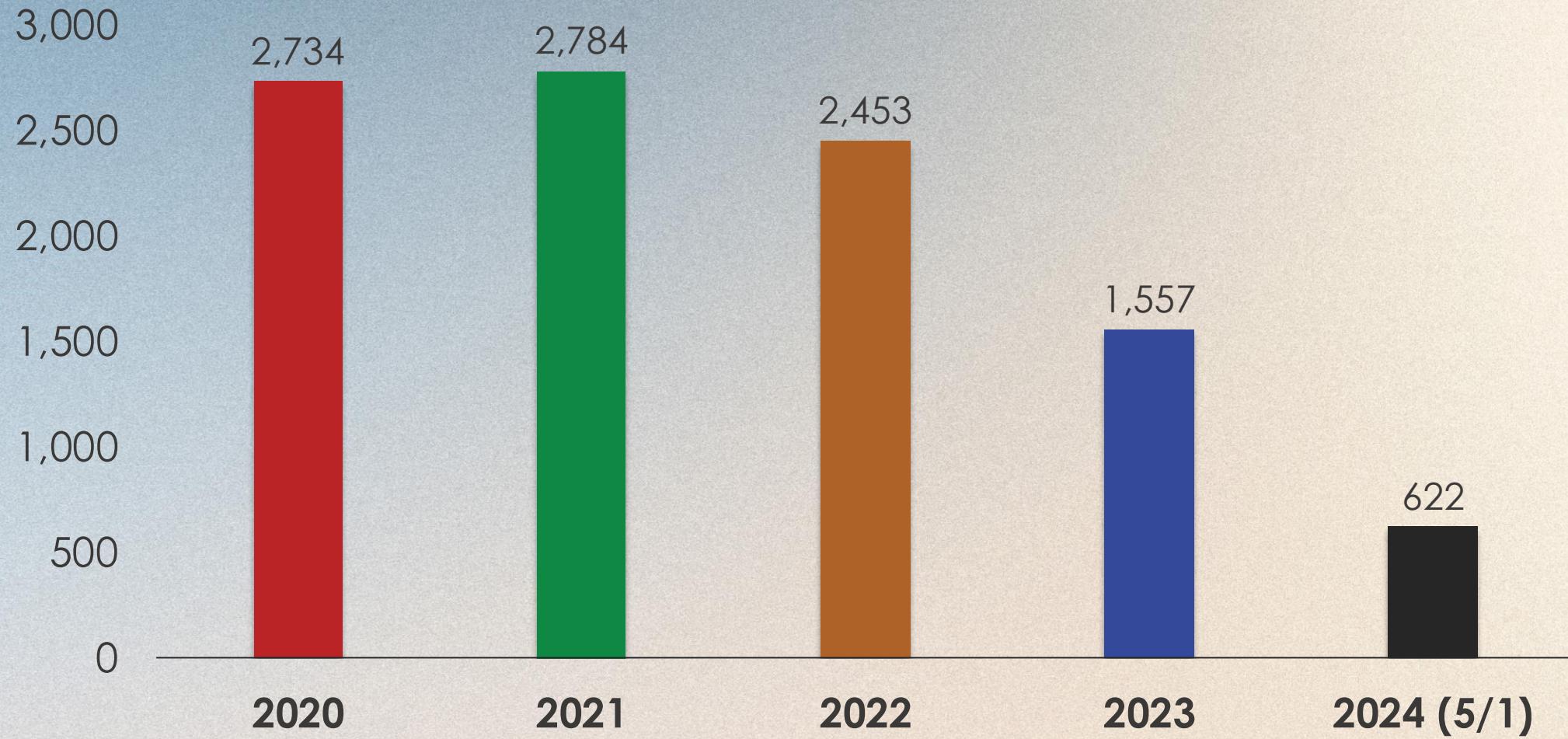


Zoning Breakdown

Zone	%	Acres
A	55.33%	237,026.0
GC	0.31%	1,311.4
GI	0.64%	2,743.5
Ie	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
Total	100.00%	428,371.8



New Residential Permits by Year (County & Municipalities)



2023 Residential Plan Approvals

	Total
Minor Subdivisions	9
Major Subdivisions	25
Total Approved Units	1,843



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



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



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



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)

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



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

