

**Figure 6-11
Central Maryland Employment (1,000s)**

Jurisdiction	1990		2000		2009	
	Jobs	Percent	Jobs	Percent	Jobs	Percent
Anne Arundel County	250.1	11%	295.2	11%	357.0	13%
Baltimore County	399.5	17%	448.5	17%	505.6	18%
Carroll County	52.4	2%	68.1	3%	82.0	3%
Harford County	75.1	3%	97.1	4%	114.9	4%
Howard County	105.8	5%	159.2	6%	187.1	7%
Baltimore City	508.5	22%	446.4	17%	384.8	14%
Frederick County	72.3	3%	103.9	4%	127.3	4%
Montgomery County	512.6	22%	593.0	23%	645.2	23%
Prince George's County	372.4	16%	391.2	15%	428.4	15%
TOTAL	2,348.6	100%	2,602.5	100%	2,832.4	100%

Source: U.S. Bureau of Economic Analysis, May 2011

**Figure 6-12
Baltimore Region Rentable Building Area by Type in 2010 (X 1,000 sq. ft.)**

Jurisdiction	Office Space		Flex Space		Industrial Space		Retail Space		Total Space	
	Area	Percent	Area	Percent	Area	Percent	Area	Percent	Area	Percent
Baltimore County	37,300	30%	17,200	35%	44,100	24%	44,400	35%	143,000	29%
Baltimore City	45,400	36%	5,700	12%	54,800	30%	27,100	21%	133,000	27%
Anne Arundel County	19,800	16%	11,000	22%	25,100	14%	27,000	21%	82,900	17%
Howard County	16,800	13%	11,500	23%	31,300	17%	11,000	9%	70,600	15%
Harford County	4,600	4%	2,700	6%	19,200	11%	11,500	9%	38,000	8%
Carroll County	2,100	2%	900	2%	7,900	4%	7,000	5%	17,900	4%
TOTAL	126,000	100%	49,000	100%	182,400	100%	128,000	100%	485,400	100%

Source: Howard County Economic Development Authority, 4th quarter 2010 data

General Plan 2000 set job growth targets of 4,000 new jobs per year between 2000 and 2010 and 3,000 jobs per year between 2010 and 2020. This was based on a rationale that the strong job growth of the mid- and late-1990s would continue for a while before slowing down into the next decade as undeveloped land became scarcer. Actual job growth between 2000 and 2009 averaged about 3,100 jobs per year, less than the 4,000 annual growth targets for this initial decade. However, considering that the two recessions that occurred since 2000 had not been anticipated, the County fared relatively well due to strong job growth in the middle of the last decade.

Capacity for Future Nonresidential Growth

In 2010 there was a total of 10,000 acres of developed commercial (office and retail), industrial, and institutional land. About 314 additional acres had signed site plans where construction was already under way or would begin soon. Another 227 acres were being reviewed for proposed future development. The remaining 1,351 acres with additional nonresidential capacity based on current zoning were undeveloped with no plans for them yet. This includes 614 commercially zoned acres and 737 industrially zoned acres. Figure 6-13 shows these acres, including their distribution in each planning area.

This nonresidential land use capacity can be translated into potential jobs based on zoning density. Based on current zoning, there is an estimated capacity for an additional 78,000 jobs in Howard County. This includes new jobs associated with the Downtown Columbia plan. The Downtown acreage for this is not included in Figure 6-14 since it is primarily a redevelopment or intensification project. With just over 11% of nonresidential land in Howard County undeveloped, much of the

**Figure 6-13
Nonresidential Acreage Distribution by Stage and Type in Howard County**

		Commercial	Industrial	Institutional	Total	Percent
Columbia	Existing	2,000	481	298	2,779	86.9%
	Signed	45	12	0	57	1.8%
	In-Process	45	18	0	63	2.0%
	Undeveloped	210	88	0	298	9.3%
	Total	2,301	599	298	3,197	100.0%
Ellicott City	Existing	588	49	301	938	82.5%
	Signed	37	4	0	41	3.6%
	In-Process	6	0	0	6	0.6%
	Undeveloped	128	24	0	152	13.4%
	Total	759	77	301	1,137	100.0%
Elkridge	Existing	566	1,124	372	2,061	79.7%
	Signed	25	34	0	58	2.3%
	In-Process	7	32	0	38	1.5%
	Undeveloped	63	364	0	427	16.5%
	Total	660	1,553	372	2,585	100.0%
Southeast	Existing	952	1,749	168	2,870	81.9%
	Signed	147	12	0	158	4.5%
	In-Process	76	0	0	76	2.2%
	Undeveloped	138	261	0	399	11.4%
	Total	1,313	2,021	168	3,502	100.0%
Rural West	Existing	406	45	992	1,443	92.4%
	Signed	0	0	0	0	0.0%
	In-Process	43	0	0	43	2.8%
	Undeveloped	74	0	0	75	4.8%
	Total	523	46	992	1,561	100.0%
Countywide	Existing	4,512	3,449	2,130	10,091	84.2%
	Signed	253	61	0	314	2.6%
	In-Process	177	49	0	227	1.9%
	Undeveloped	614	737	0	1,351	11.3%
	Total	5,556	4,296	2,130	11,982	100.0%

Note: Existing acres as of Sept. 30, 2010 & In-Process Acres as of end of Nov. 2010

Source: Howard County DPZ Land Use Database

future economic growth will occur through redevelopment or a more intensive use of existing properties.

**Figure 6-14
Howard County Employment Growth Targets**

Year	Job Increase	Total Jobs
2000		159,200
2010	29,900	189,100
2015	15,000	204,100
2020	15,000	219,100
2025	15,000	234,100
2030	15,000	249,100

Source: 2000 job total from U.S. BEA

2010 job estimate from MDP

Job Growth to 2030

Based on the average pace of job growth in Howard County of about 3,100 new jobs per year over the last decade, continuing to add 3,000 new jobs per year between 2010 and 2030 is a reasonable job target for this general plan. Figure 6-14 summarizes these projections.

Therefore, over the 20-year period a total of 60,000 new jobs are forecast. Based on the available nonresidential land in the County described above and future redevelopment and intensification projects such as Downtown Columbia, there is enough land capacity to accommodate these projected jobs. At this rate it is estimated that there will be about 249,000 jobs in the County by 2030. Howard County’s prime location between Baltimore and Washington is a natural attractor of new businesses which will lead to continued job growth.

Jobs / Housing Balance

Since job growth also depends on having the workforce to fill the jobs, a common measure of how growth has been balanced is the ratio of jobs to housing. Figure 6-15 summarizes the jobs to housing ratio in Howard County since 1990. The jobs to housing ratio has increased from 1.51 in 1990 to 1.78 in 2009. This is a result of continued job growth in the County even while there have been constraints on residential growth due to the County’s Adequate Public Facilities Act. Setting housing limits too low in relation to job growth and associated housing demand contributes to higher housing prices, forcing many Howard County workers to commute greater distances for affordable housing.

**Figure 6-15
Jobs to Housing Ratio in Howard County**

Year	Jobs	Households	Jobs/ Households
1990	105,800	70,000	1.51
2000	159,200	90,000	1.77
2009	187,100	105,000	1.78

Source: Jobs data - U.S. Bureau of Economic Analysis

Households - Howard County DPZ

(Data rounded to the nearest 100)

Howard County’s current jobs to housing ratio is similar to those in Montgomery and Anne Arundel Counties. In 2010 all three are essentially the same at 1.77, 1.79 and 1.80, respectively. These three counties all have significant numbers of

jobs given their centrality within the Baltimore-Washington area. By comparison, other jurisdictions in Central Maryland have smaller ratios. The average for Central Maryland is 1.58. Statewide the average is a slightly smaller 1.54 (Figure 6-16).

Figure 6-16
Jobs to Housing Ratio Comparisons - Central Maryland Jurisdictions

Jurisdiction	2000			2010 Estimates		
	Jobs	Households	Jobs/House.	Jobs	Households	Jobs/House.
Anne Arundel County	295,200	178,700	1.65	359,300	199,600	1.80
Montgomery County	593,000	324,600	1.83	645,000	360,500	1.79
Howard County	159,200	90,000	1.77	189,100	107,100	1.77
Baltimore County	448,500	299,900	1.50	503,200	319,900	1.57
Frederick County	103,900	70,000	1.48	128,200	83,700	1.53
Baltimore City	446,400	258,000	1.73	388,500	260,300	1.49
Prince George's County	391,200	286,600	1.36	423,600	307,500	1.38
Carroll County	68,100	52,500	1.30	81,900	60,600	1.35
Harford County	97,100	79,700	1.22	116,800	92,200	1.27
Central MD Region	2,602,600	1,640,000	1.59	2,835,600	1,791,400	1.58
State Total	3,065,200	1,980,900	1.55	3,359,800	2,181,800	1.54

Source: 2000 households from the U.S. Census (rounded), 2000 jobs from U.S. BEA.

2010 household and job estimates from Maryland Department of Planning, except HC households which are based on Howard County DPZ estimated (Data rounded to the nearest 100)

Looking forward to 2030, assuming all the future housing units in Figure 6-10 (plus actual units built in 2011 and forecasts through 2014) and 3,000 new jobs per year are attained, the jobs to housing ratio would fall to 1.68 from 1.77. The ratio for the 20-year growth increment is 1.45. Note that while these numbers are important for determining expected trends at the County level, and with the ultimate goal of achieving a good "balance" between jobs and housing, this ratio is really more appropriate as a regional measure, since residents live and work throughout the region (Figure 6-17).

Figure 6-17
Howard County Projected Jobs to Housing Ratio

Year	Jobs	Households	Jobs/House
2010	189,100	107,150	1.77
2020	219,100	127,700	1.72
2030	249,100	148,600	1.68
20 Year Growth	60,000	41,450	1.45

Source: Howard County DPZ

While a high jobs to housing ratio is generally considered desirable from a fiscal perspective, an important consideration is the ratio of County jobs actually held by County residents. This has a significant impact on both where income taxes are paid and on the amount of commuter traffic generated. In 1990, 36% of the County resident labor force worked in the County, 64% commuted to areas outside the County, and 56% of jobs in Howard County were filled by non-County residents. By 2000, 38% of the County resident labor force worked in the County and 62% commuted to areas outside the County. This is a positive trend with more Howard County residents working in the County. In 2000, 57% of jobs in Howard County were filled by non-County residents, a slight increase compared

to 1990. Chapter 7, Transportation, includes further discussion on the implications of regional workforce community patterns.

Fiscal Impacts

A fiscal impact study has been conducted as part of *PlanHoward 2030*. The fiscal study is provided as a supplement to this document and summarizes the fiscal impacts of various growth and market value scenarios. Overall, the study shows that future job and housing growth outlined in this plan pays for itself. That is, revenues such as property and income taxes from new development are enough to cover costs for public services. The study does show, however, that with property and income taxes making up about 90% of General Fund revenues, trends in market values should be watched closely. This is important particularly because the net fiscal margins from multifamily units, which will be built at a higher proportion in the future, are not as great as from single-family detached units. Trends in public school enrollments should also be closely watched given school costs account for about 60% of General Fund costs. Generally, multifamily units generate fewer school children, but if there are fewer single-family detached units built, student yields in these types of units could potentially rise.

The fiscal study also shows that the residential and nonresidential growth targets outlined in this plan achieve a good balance in the commercial-residential assessable base ratio maintaining existing levels. This relates to the importance of achieving an optimal jobs/housing balance as discussed earlier. Similar to the importance of having a diverse job base, maintaining a diverse tax base is healthy from a fiscal perspective to avoid too much reliance on a single land use type.

Policies and Implementing Actions

POLICY 6.3 – Use *PlanHoward 2030* job and housing forecasts to guide County, regional, and State agency decision making regarding infrastructure and services.

Implementing Actions

- a. Baltimore Metropolitan Council. Incorporate *PlanHoward 2030* housing, population, and job forecasts into the Baltimore Metropolitan Council's official regional forecasts.
- b. Monitoring. Monitor the amount, type, and location of actual housing, population, and job growth for comparison with *PlanHoward 2030* forecasts.

POLICY 6.4 – Ensure that the County continues to capture future job and business growth opportunities.

Implementing Actions

- a. Economic Development. Partner with the Economic Development Authority to develop County policies and programs to implement the County's Strategic Plan for Economic Development.
- b. Zoning Regulations. Update zoning and other regulations to address the evolving commercial and industrial markets and development trends.
- c. **Commercially and Industrially Zoned Properties.** Establish policies to protect and promote commercially and industrially zoned land for future job and business growth opportunities.