

# Comprehensive Plan Update – Community Profile

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WORCESTER COUNTY PLANNING COMMISSION

OCTOBER 6, 2022



# Data Sources

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U.S. Census Bureau, American Community Survey (multiple years)

U.S. Census Bureau, Decennial Census (multiple years)

U.S. Census Bureau, Census of Agriculture (multiple years)

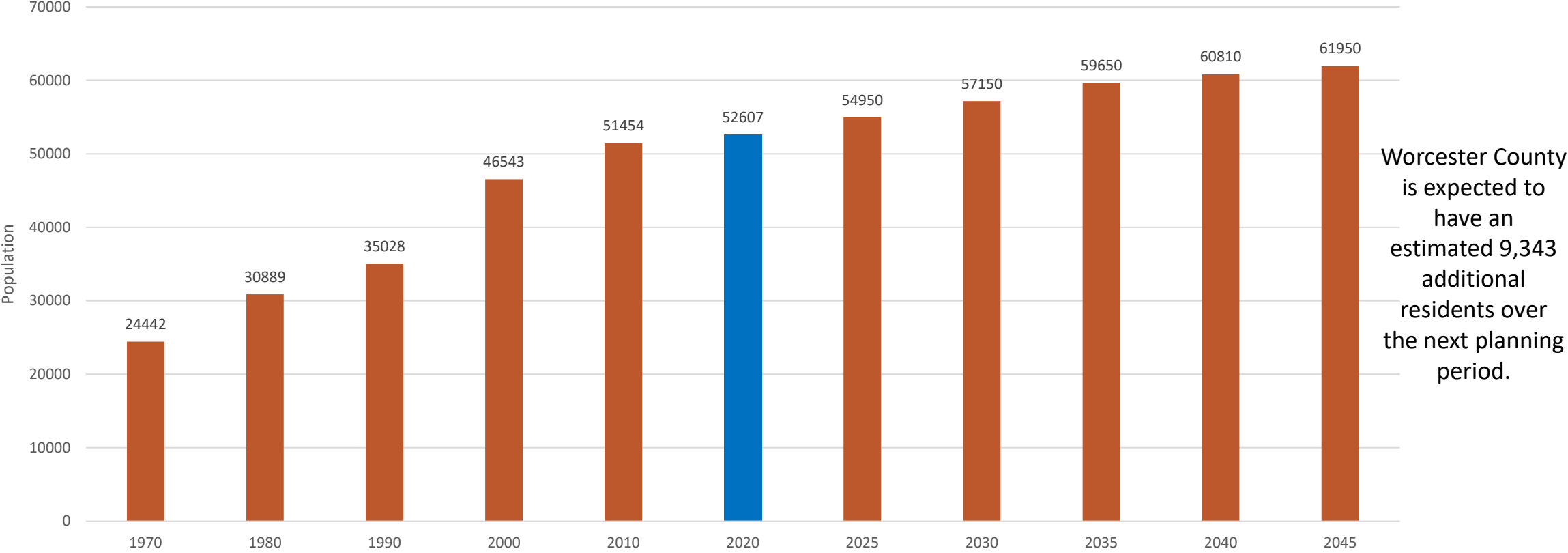
U.S. Census Bureau, Economic Census, 2017

Maryland Department of Planning State Data Center

2022 – 2023 Educational Facilities Master Plan, Worcester County Board of Education

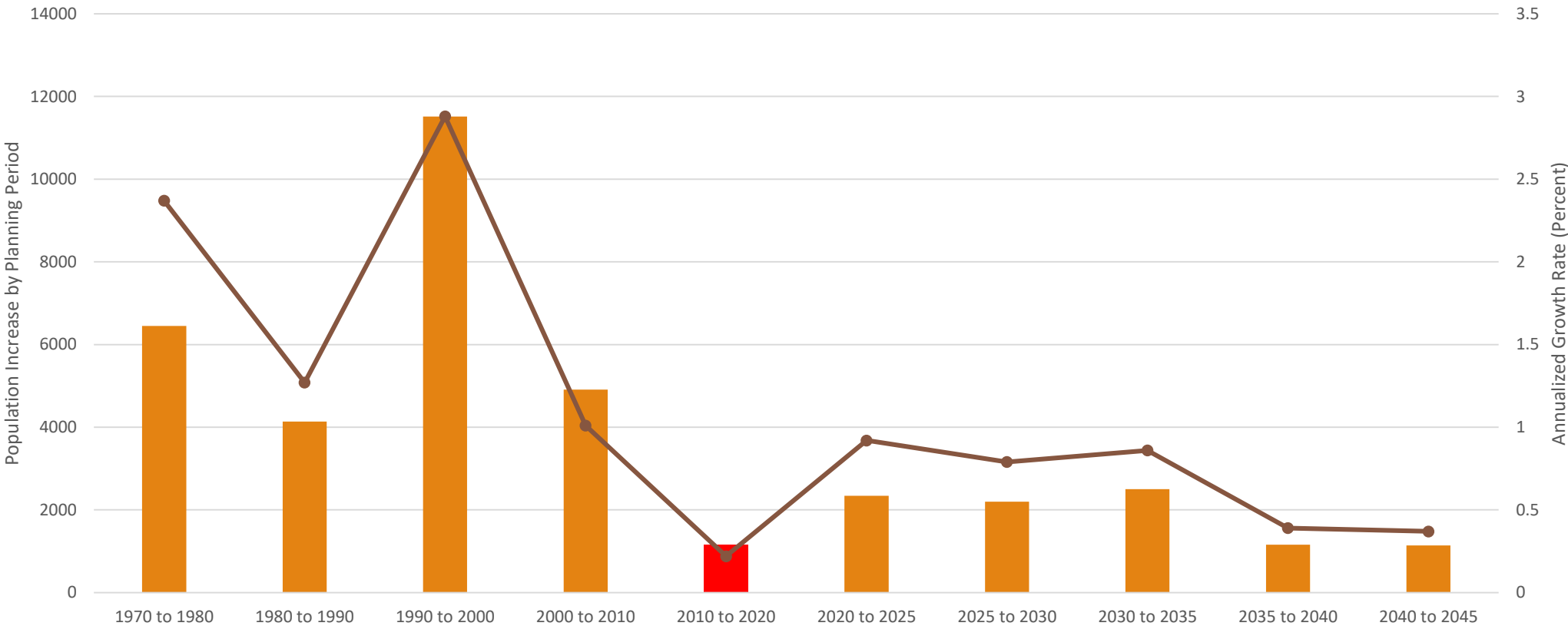
Worcester County Comprehensive Plan (2006 with amendments)

Worcester County's population has grown over the past fifty years, and that pattern is expected to continue.



Source: Maryland Department of Planning, December 2020

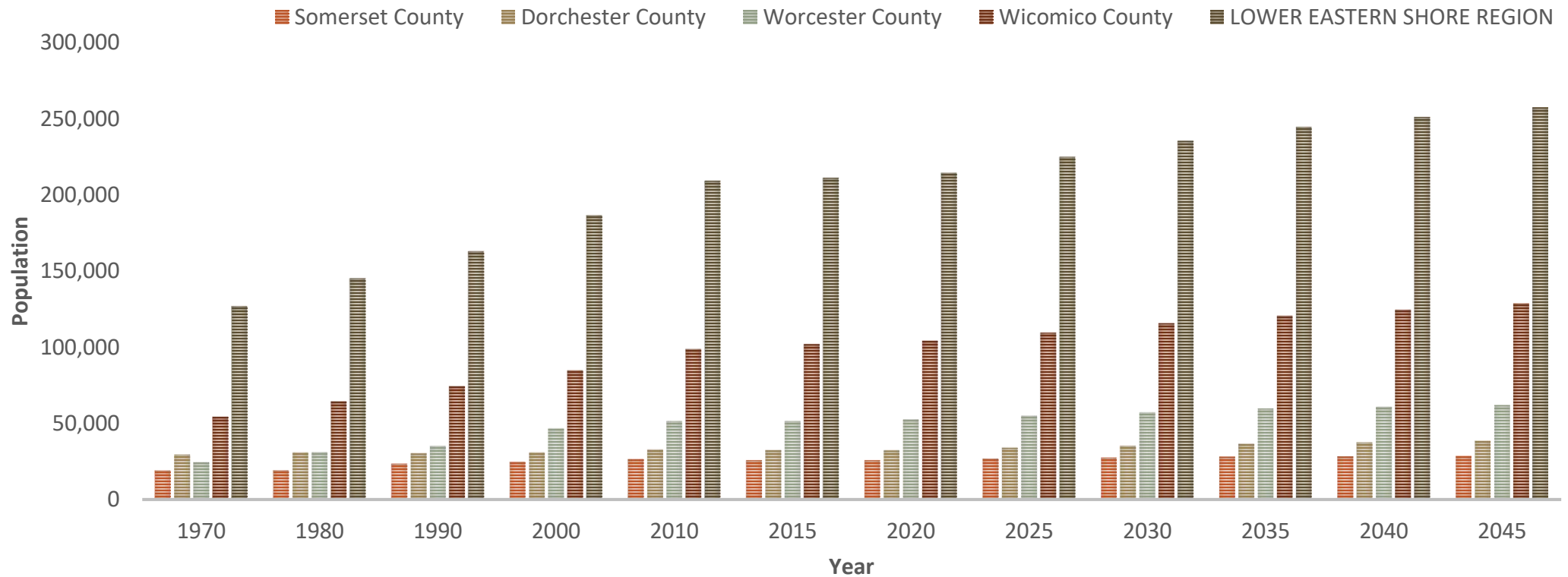
However, the average annual rate of increase has varied. Future planning estimates show a much more conservative rate of growth.



Source: Maryland Department of Planning, December 2020

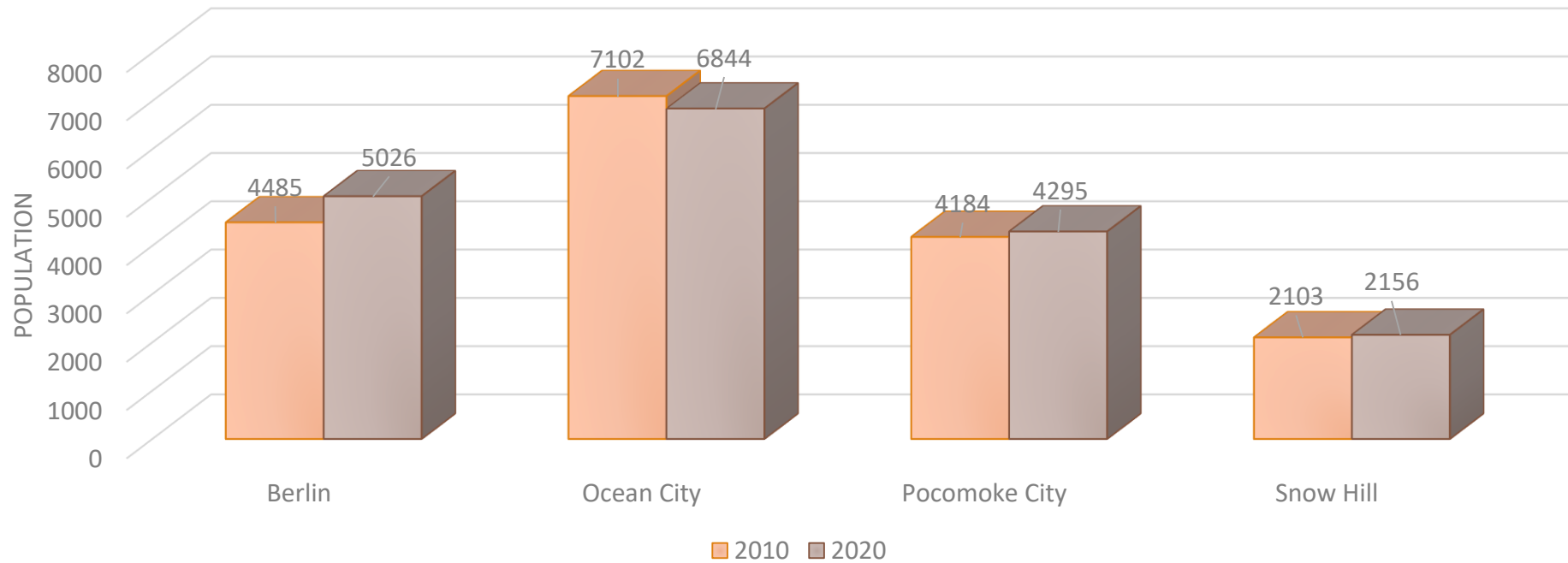
# Regional Population Growth

The other counties on the Lower Eastern Shore have experienced similar growth patterns.

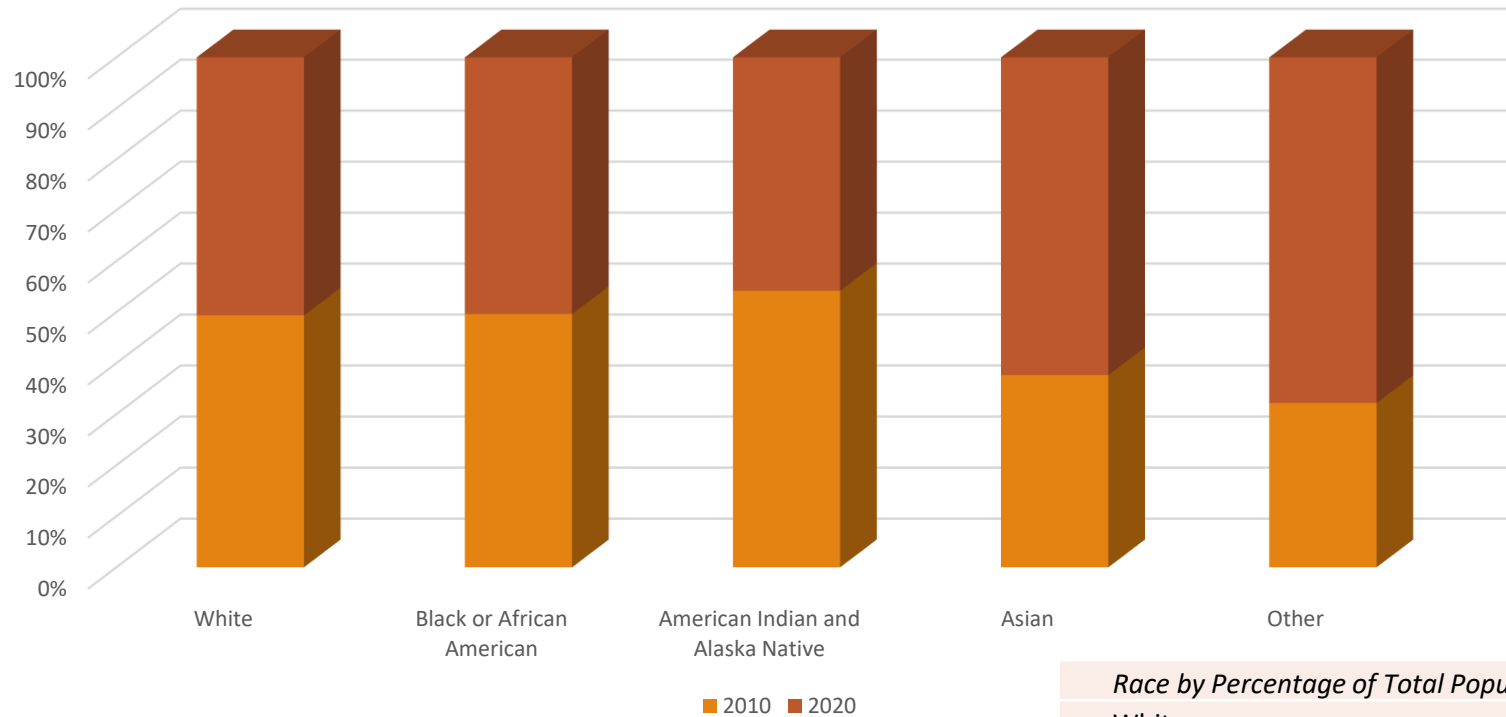


# Municipal Population Growth

Overall, less than 40% of the population growth occurred within Worcester County's municipalities. Maryland's Smart Growth initiatives encourage infill development to relieve pressures on rural areas and direct growth to areas that have existing infrastructure to reduce building costs.



The racial composition of the population has been fairly consistent over the past decade.



<i>Race by Percentage of Total Population</i>	2010	2020
White	83.5%	82.7%
Black or African American	14.1%	13.8%
American Indian and Alaska Native	0.7%	0.6%
Asian	1.2%	1.9%
Other	0.5%	1.0%

When comparing the current population figures to the 2006 Comprehensive Plan estimates, actual growth was not as high as expected.





In fact, the 2045 estimated population is not anticipated to exceed the Comprehensive Plan’s estimate for 2020.

Year	Current Comprehensive Plan Projection	2020 Census	Current MDP Projections	Difference
2020	62,043	52,607	-	-9,436
2025	64,543	-	54,950	-9,593
2030	-	-	57,150	-
2035	-	-	59,650	-
2040	-	-	60,810	-
2045	-	-	61,950	-

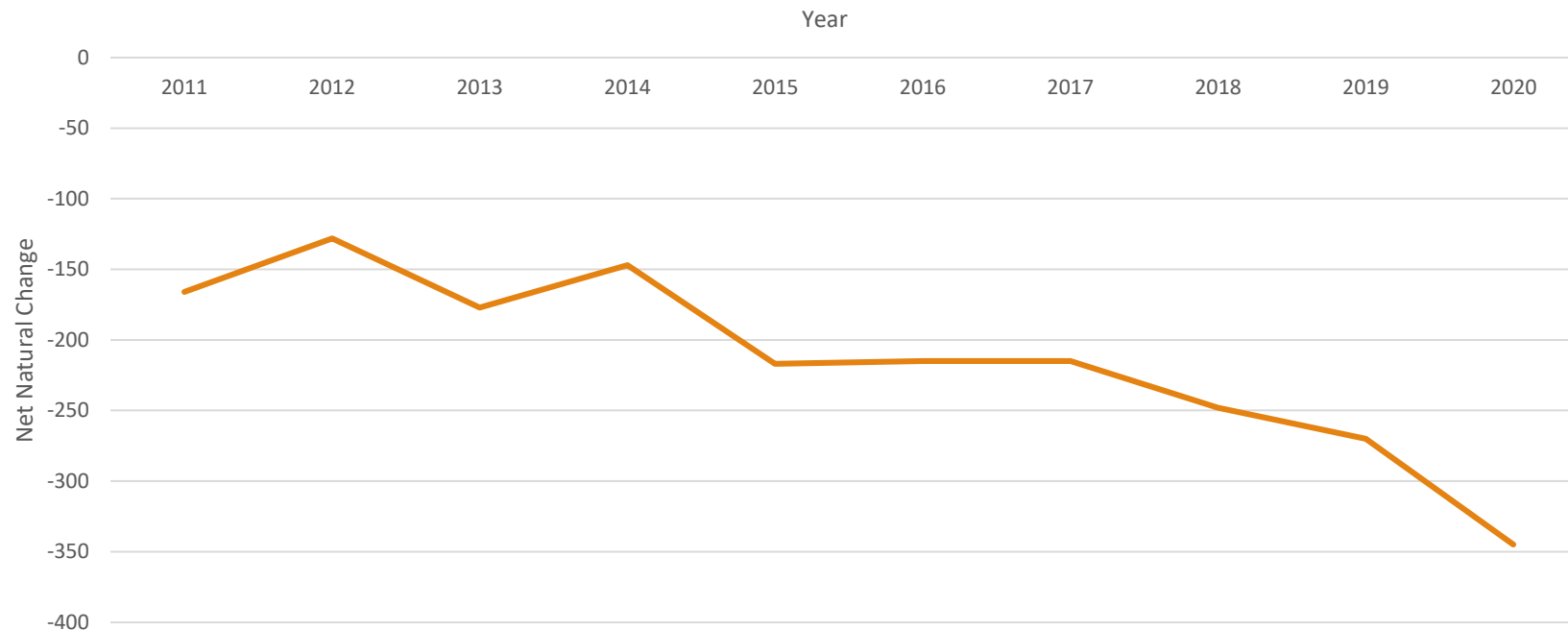
However, the Planning Commission will need to taken into consideration the various changes that have occurred during this planning period, such as infrastructure improvements (roads, water, sewer, etc.) and the current status of planned Growth Areas, to ensure adequate capacity will be available for the anticipated population growth in our next planning period.

# So how did we grow?

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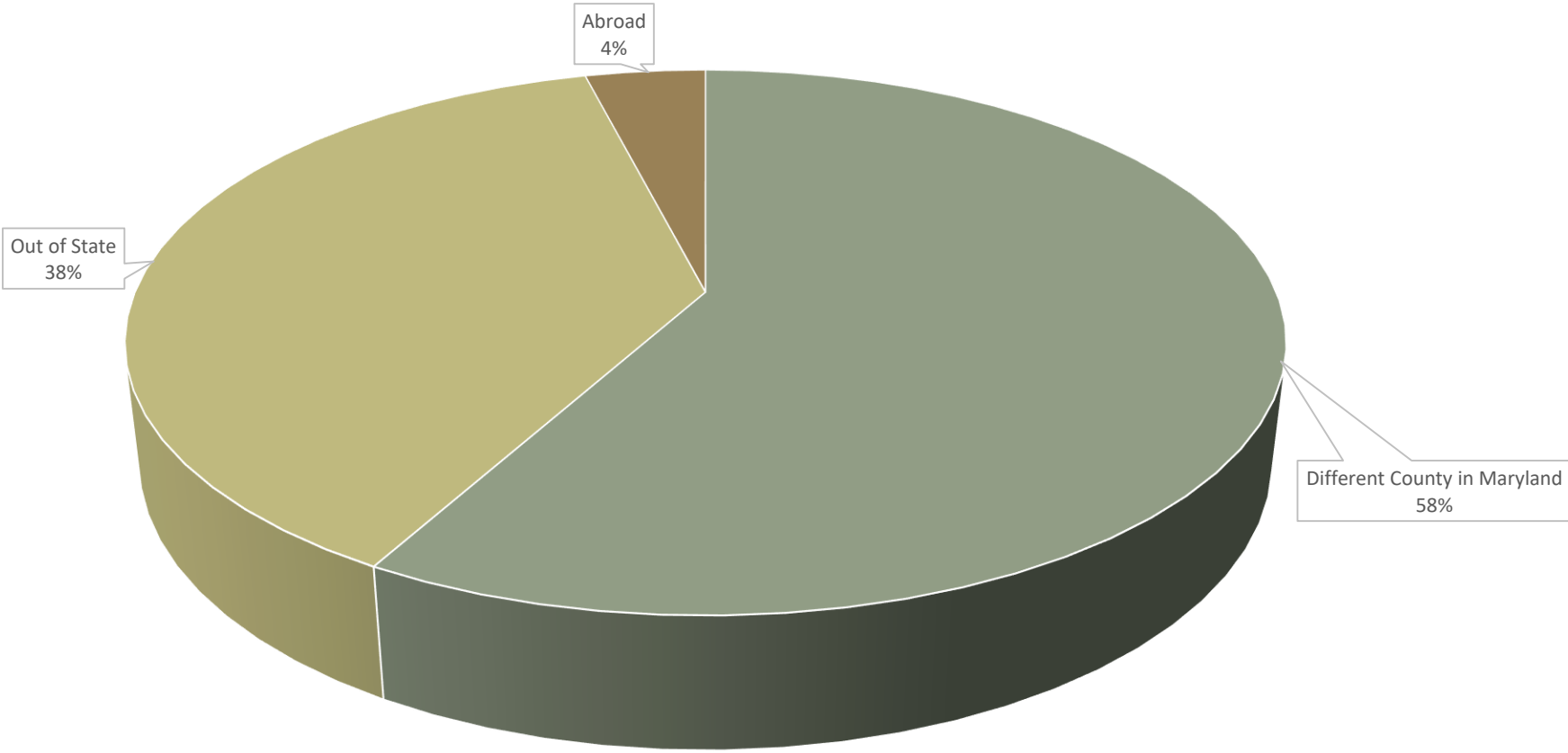
## Net Natural Change

Defined as the total number of births minus the total number of deaths per year, Worcester County experienced a **negative** net natural change of 2,128 persons over the past ten years. This indicates that the population increases documented in the 2020 Census are as a result of in-migration.

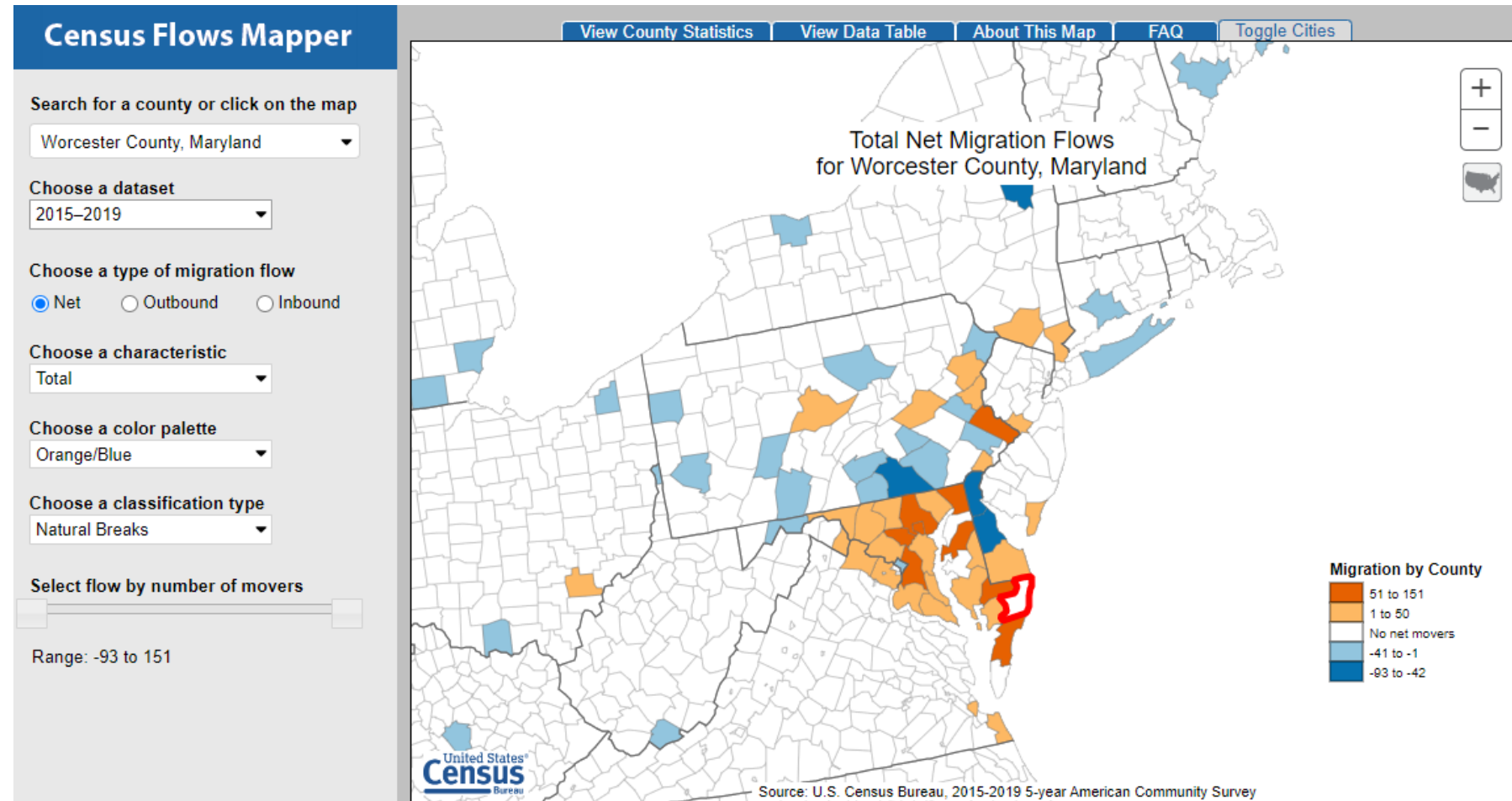


# Net Migration Patterns, 2010 to 2019

Where did the new residents come from?

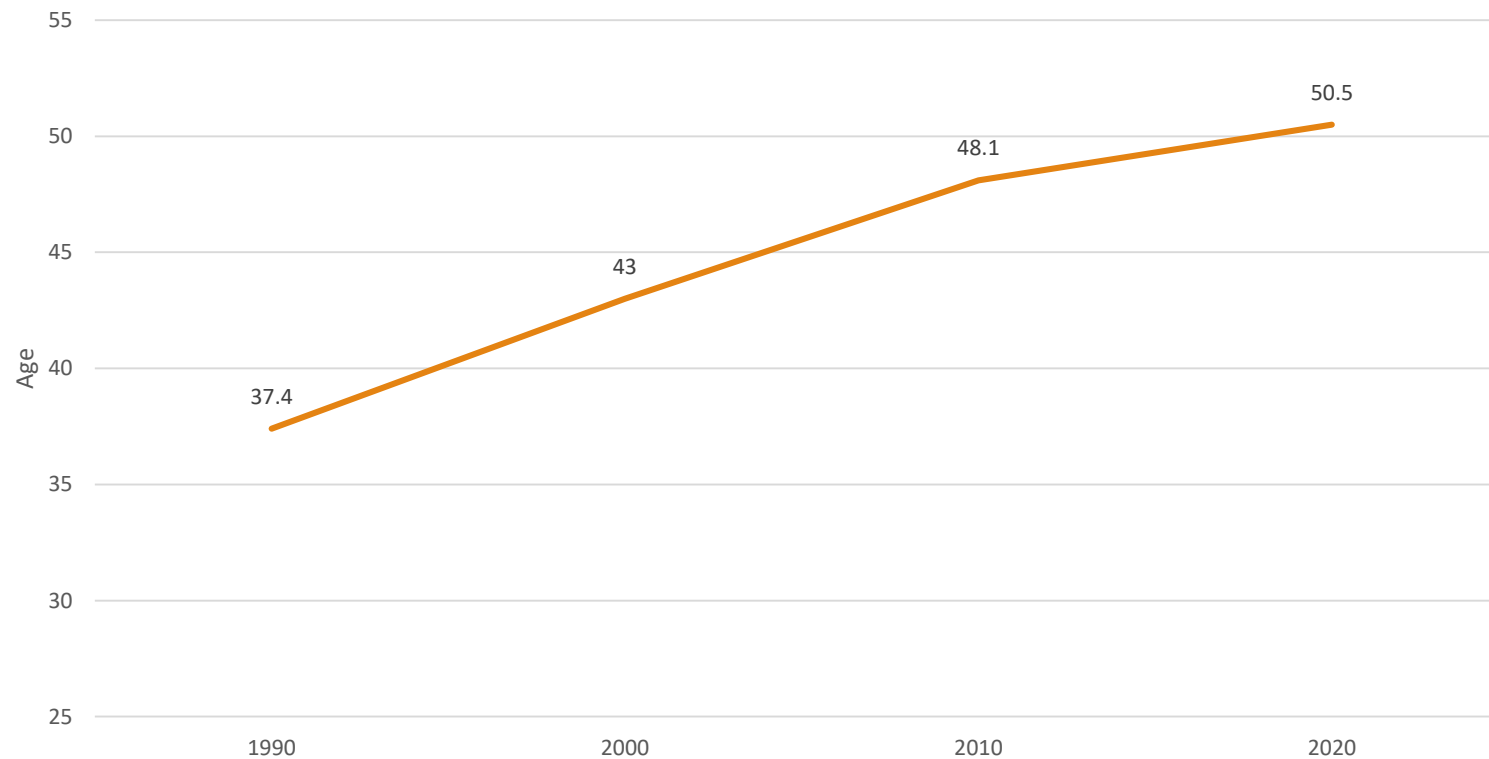


# Net Migration by County, 2015 to 2019



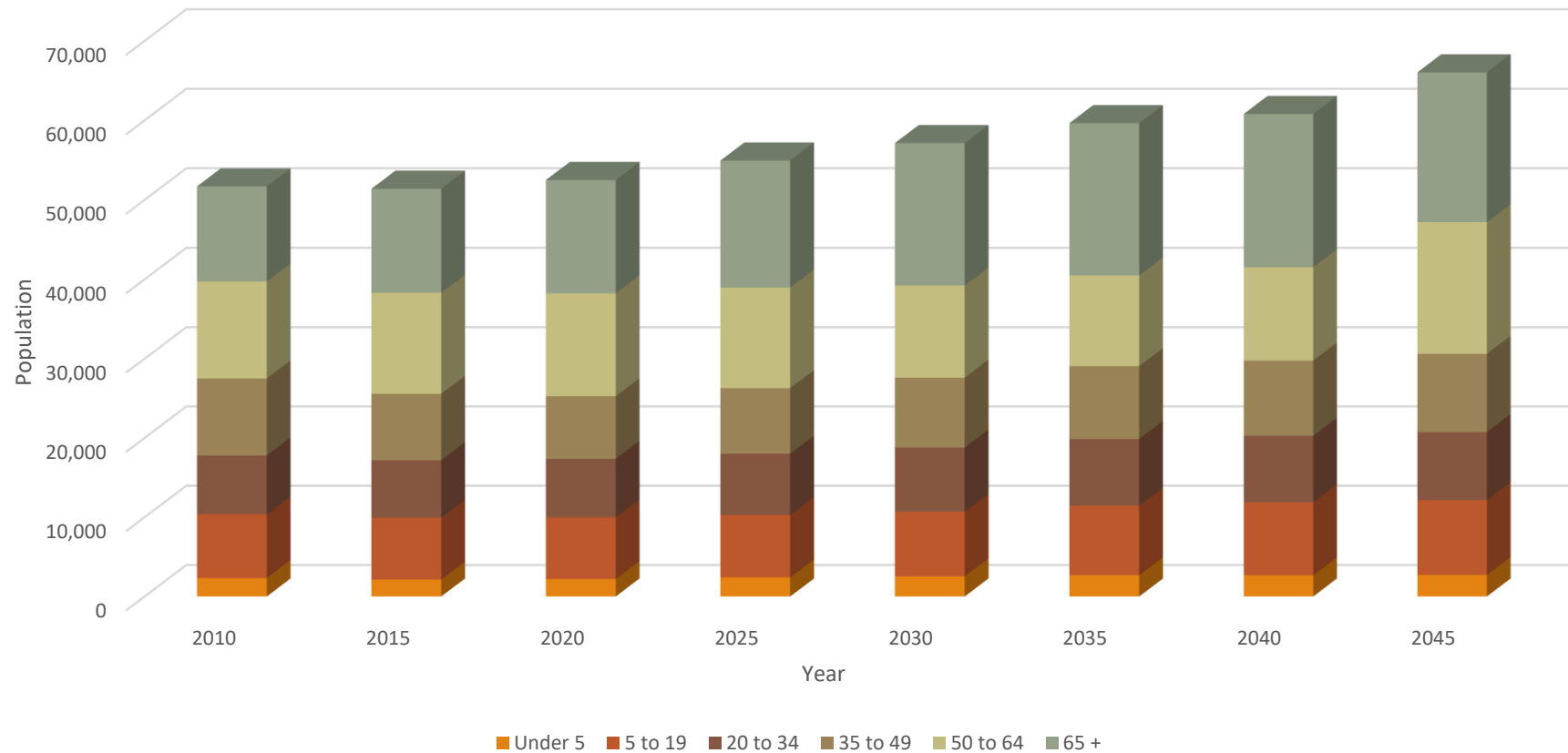
The median age of Worcester County residents has been steadily increasing....

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...with the median age as of 2020 at 50.5 years, higher than the state (38.3 years) and national (38.5 years) medians.

Worcester County's population is expected to predominantly increase in the 50-64 and 65+ age groups over the next planning period. The growth rate in these groups is nearly 3.8 times higher than that for school-age children.

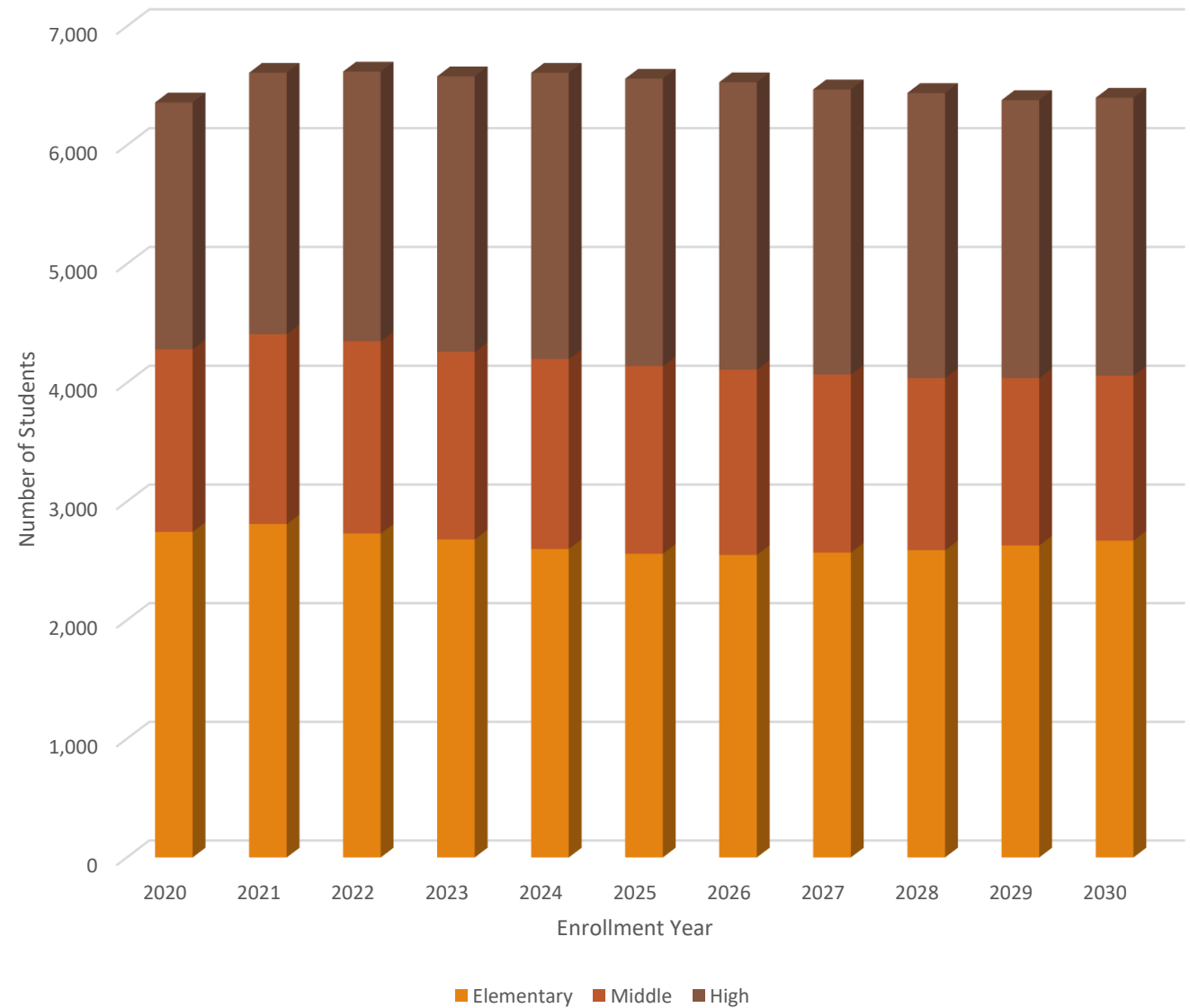


# Historic and Projected School Enrollment, K - 12

Worcester County enrollment is expected to remain fairly stable over the next ten years. Peak enrollment over the planning period is expected to occur in 2022.

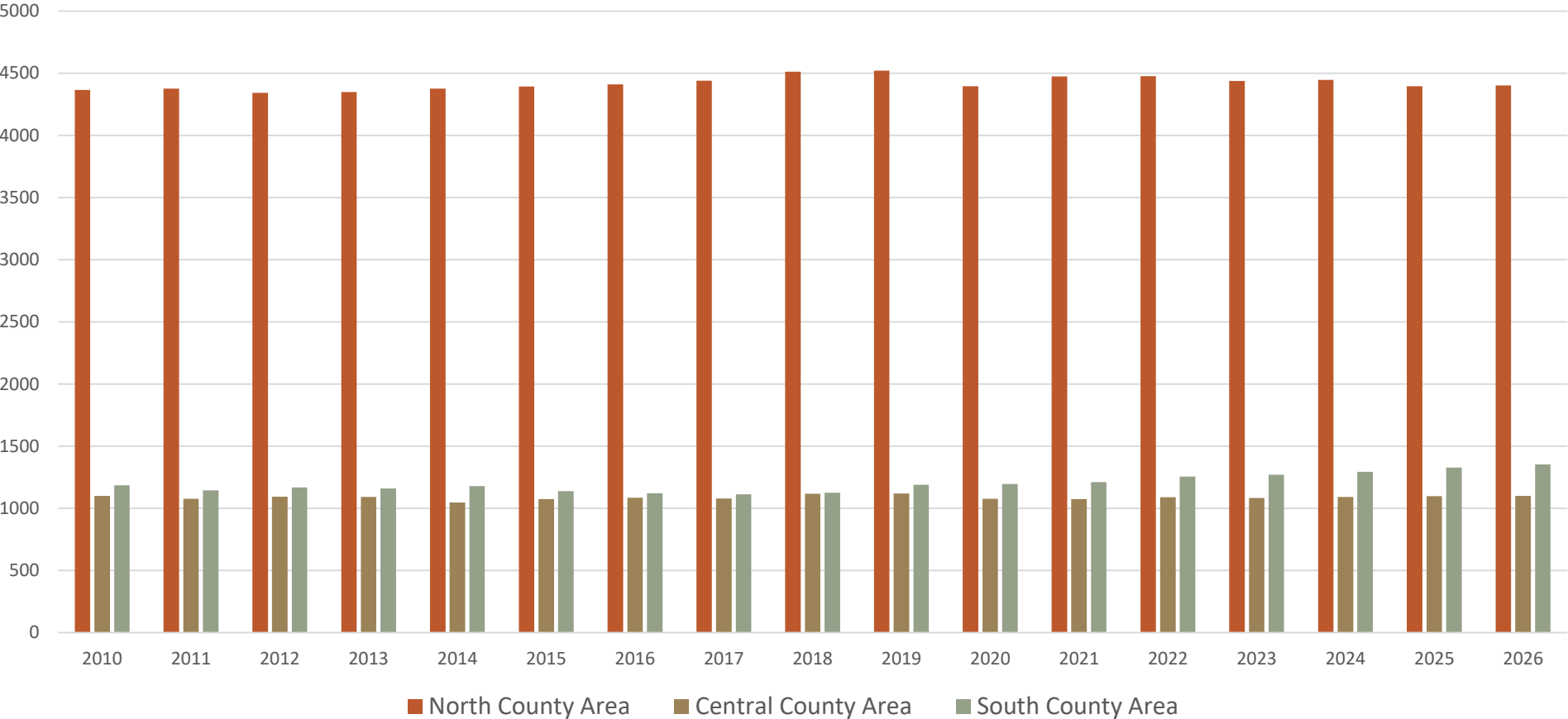
This information does not include Pre-K enrollments.

The 2022 – 2023 Educational Facilities Master Plan considers the states' planning estimates to be conservative, and anticipates greater enrollment levels as additional residential developments reach build out.



Sources: Maryland Department of Planning, March 2022;  
2022-2023 Educational Facilities Master Plan, Worcester County Board of Education

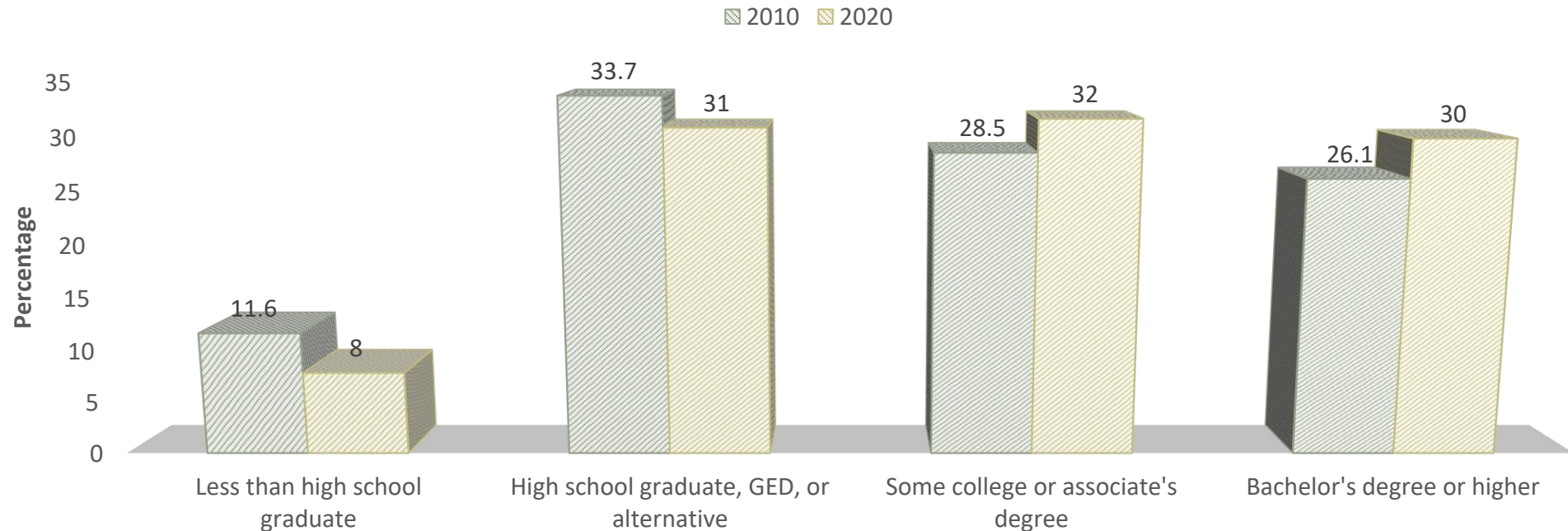
# Enrollment Figures by Geographic Area, 2010 - 2026





# Educational Attainment

For our population 25 years and older, a fairly even number are high school graduates, have some college or an associates degree, or have obtained a bachelor's degree or higher.



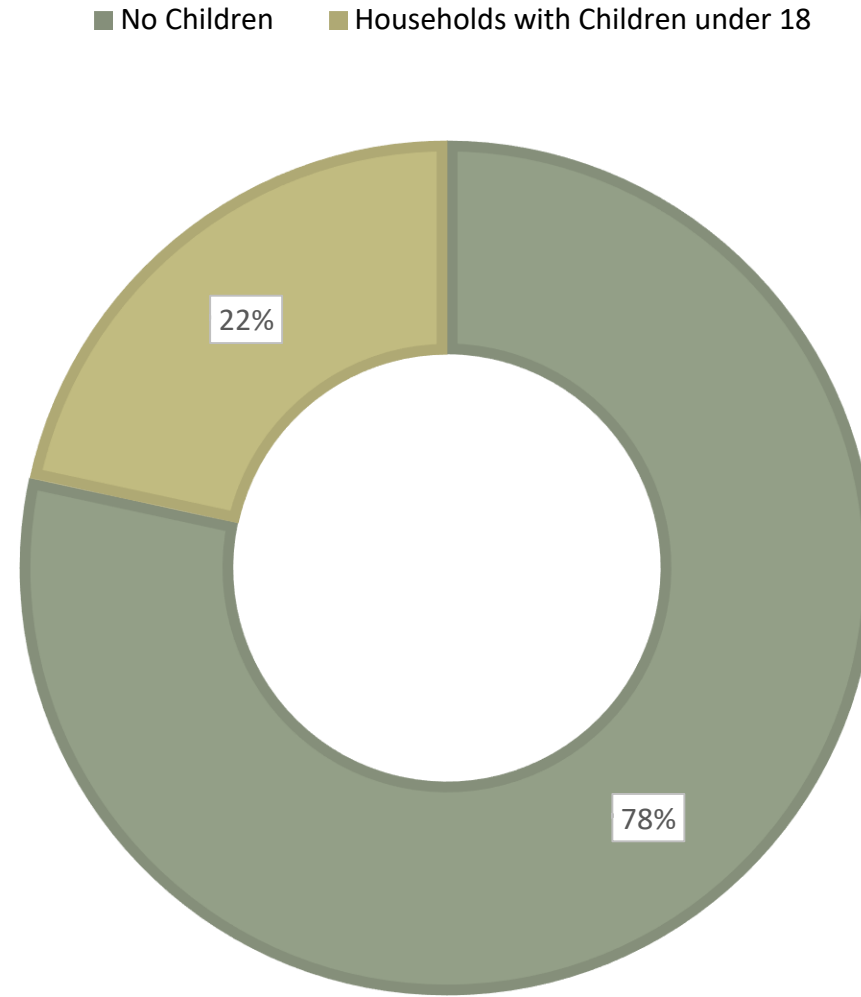
# Household Composition

There are a total of 22,661 households in Worcester County as of 2020.

The average household size is 2.26 persons.

30.1% of the population lives alone in the household.

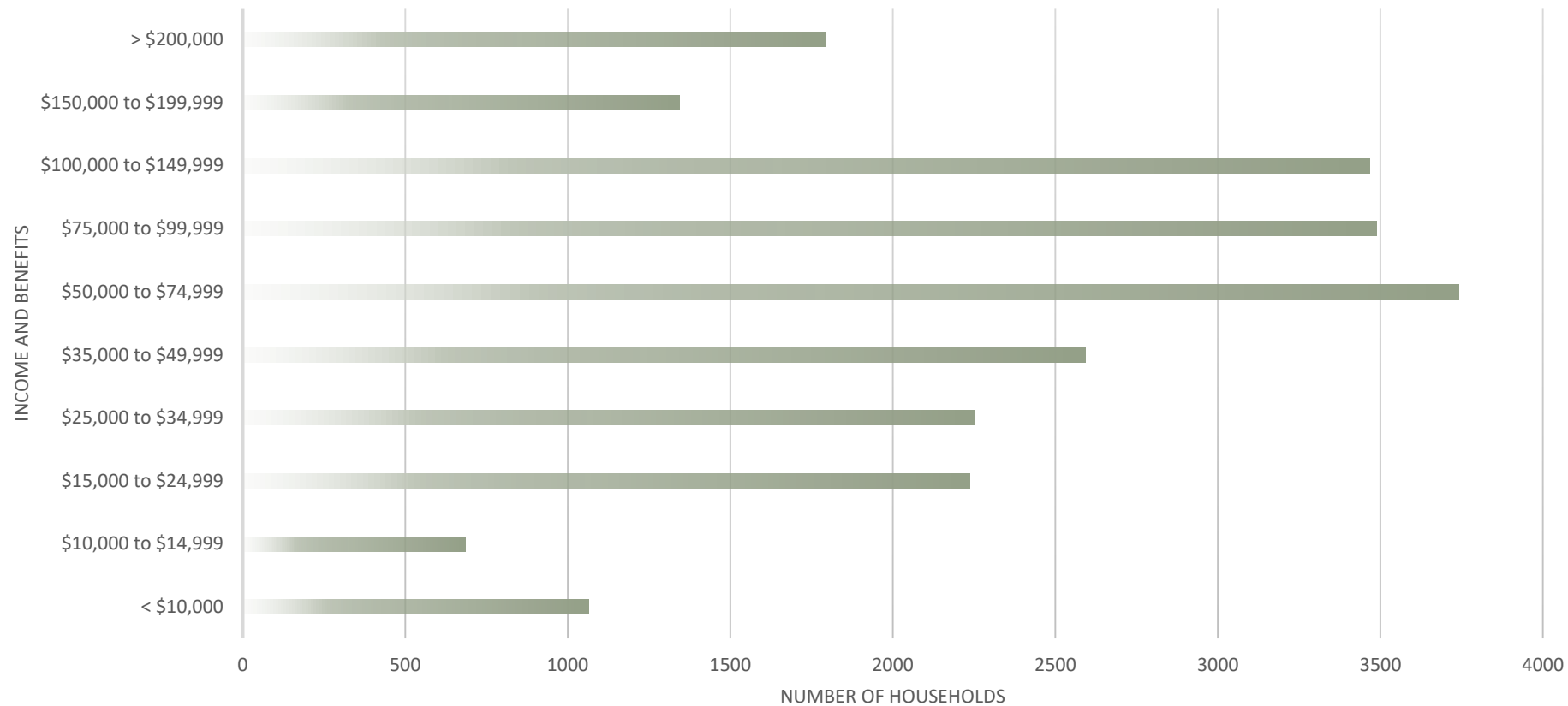
Only 22% or 4,898 households have children of school age residing in the home.



Source: Five Year American Community Survey, 2016 to 2020

# Worcester County Income by Household

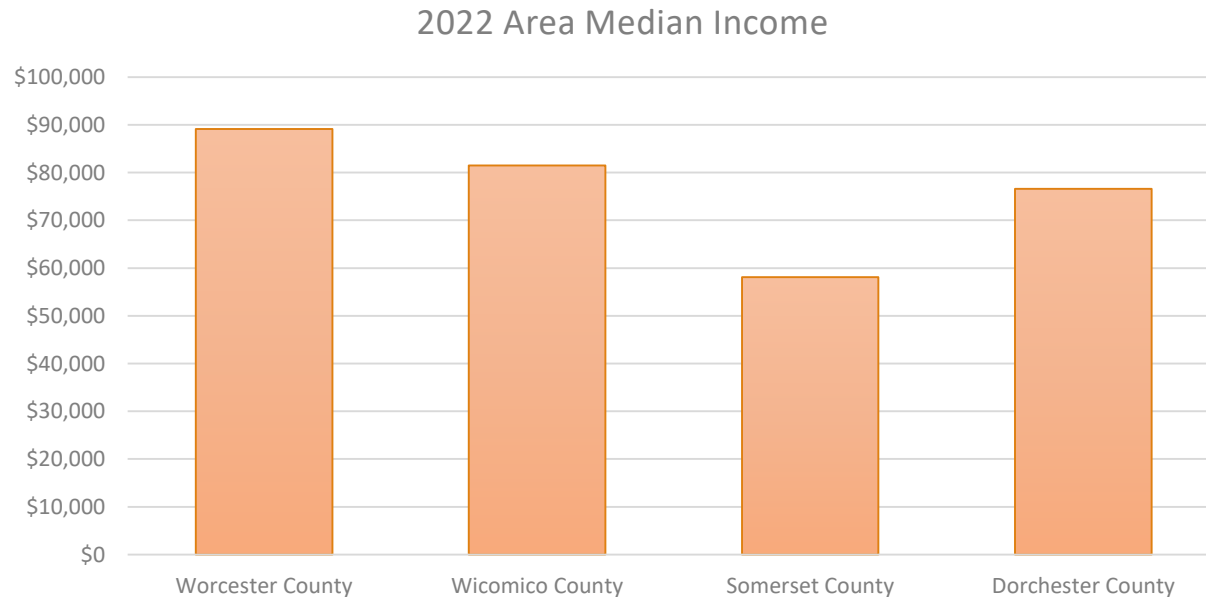
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# Area Median Income

The area median income is the level at which 50% of families are above and 50% are below the income threshold.

Worcester County has a median income of \$89,100, which is higher than our surrounding counties.

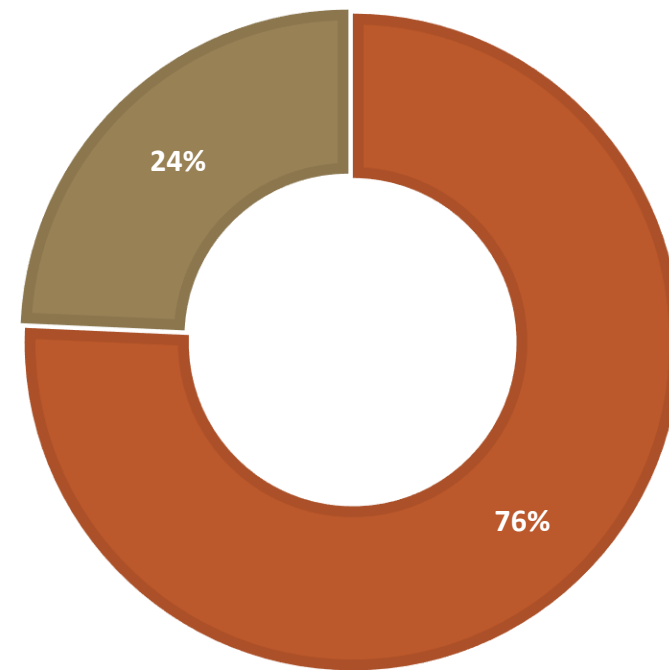


# Housing Tenure

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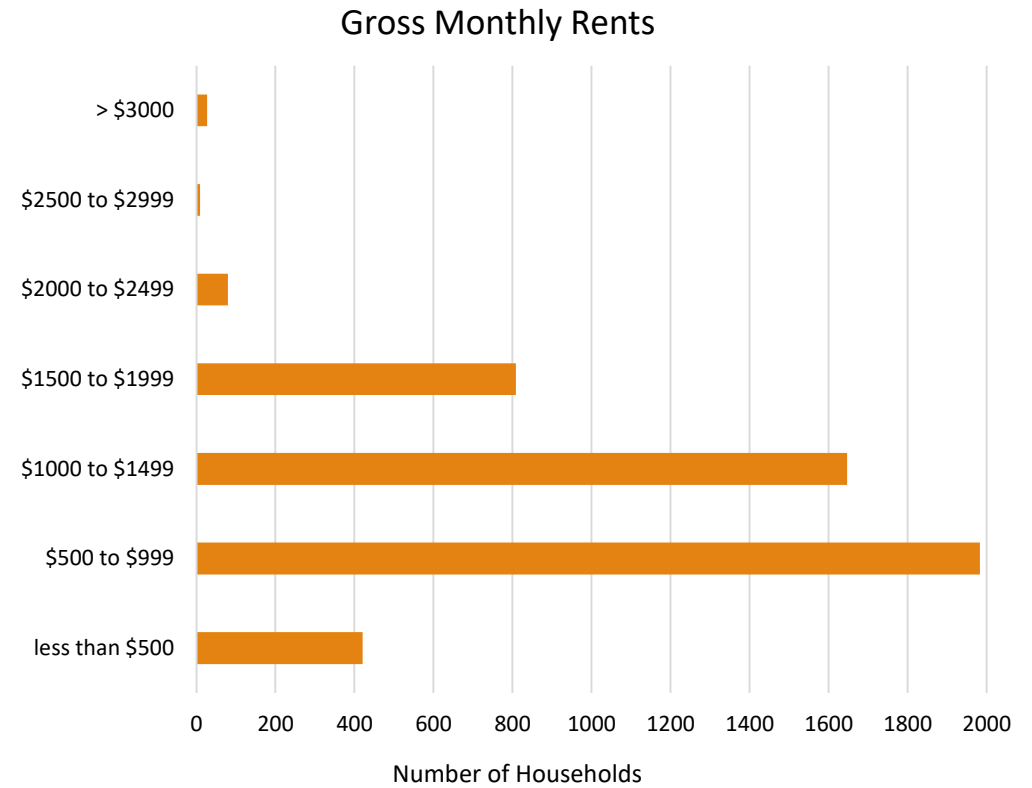
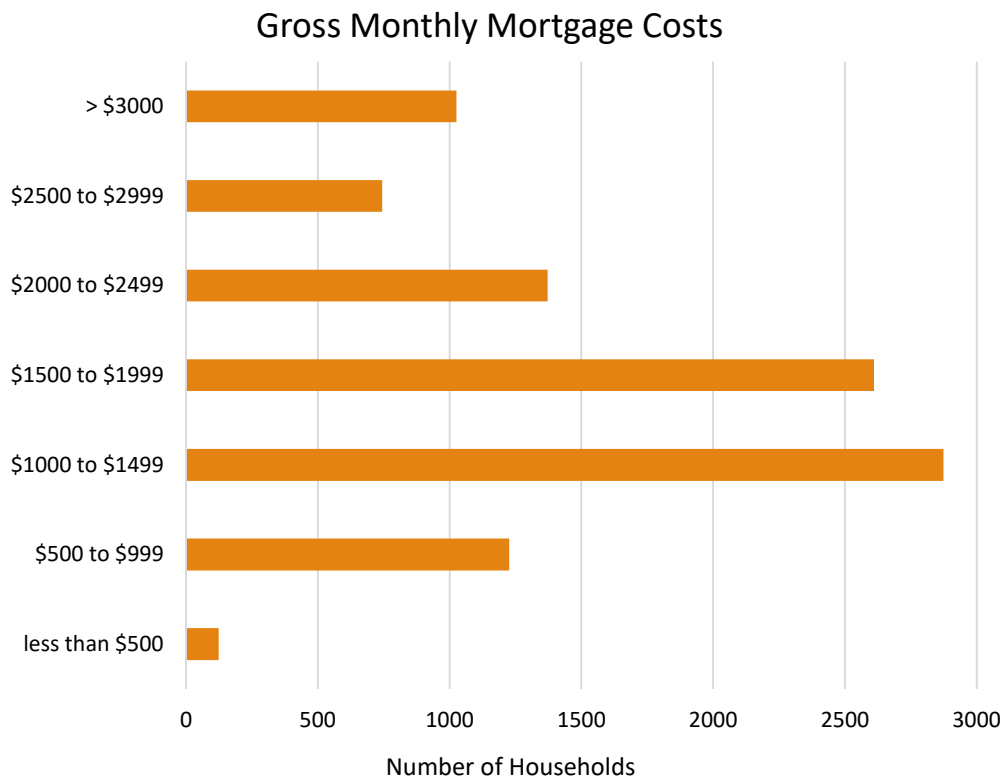
Out of the 22,661 households in Worcester County, 76% are owner occupied.

■ Owner Occupied ■ Renter Occupied



# Housing Expenses

Mortgage or rent payments should account for no more than 30% of your household income.

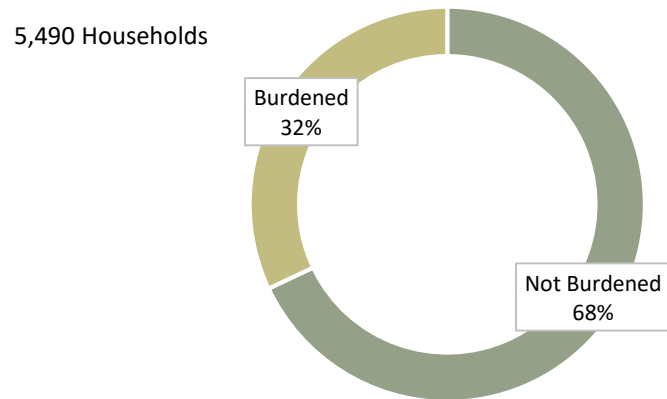


# Housing Affordability

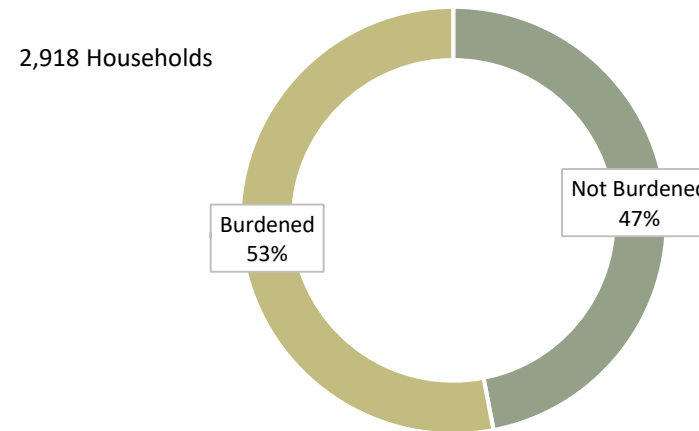
Housing burdened is defined as households that pay more than 30% of their income for housing expenses, leaving less money available to pay for necessities such as food, clothing, transportation, and medical care.

Across the state, nearly one-third of Maryland households are experiencing some form of housing burden. Worcester County is no exception.

Home Owner Costs as a percentage of Household Income



Gross Rent as a Percentage of Household Income



These figures are directly comparable to the housing expenses shown on the previous slide.

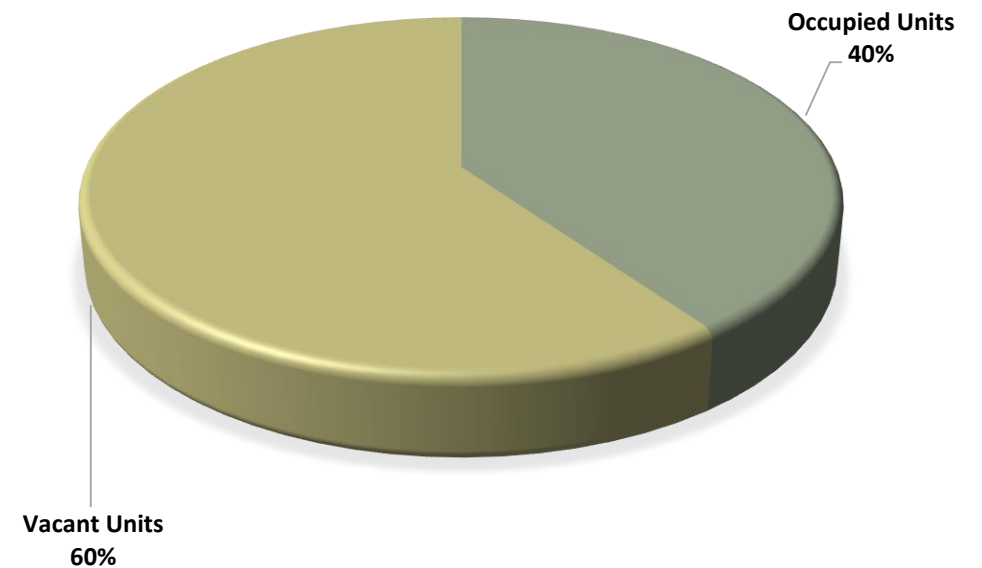
# Overall Housing Units

While Worcester County has 22,661 households, that does not represent the total number of housing units in the county.

There are an additional 33,824 housing units that were vacant, equating to 60% of the existing housing stock.

These additional units represent second homes and rental properties.

A March 2022 analysis prepared by Granicus showed that there were 9,297 individual short-term rental listings in Worcester County, 93% of which were within the Town of Ocean City. This number is likely to be conservative based on the timeframe that the analysis was conducted.



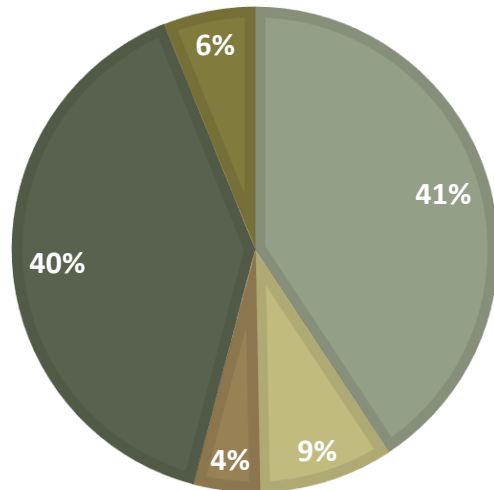


# Housing Types

While Worcester County has roughly as many apartment units as single-family dwellings, nearly 92% are located in the Town of Ocean City.

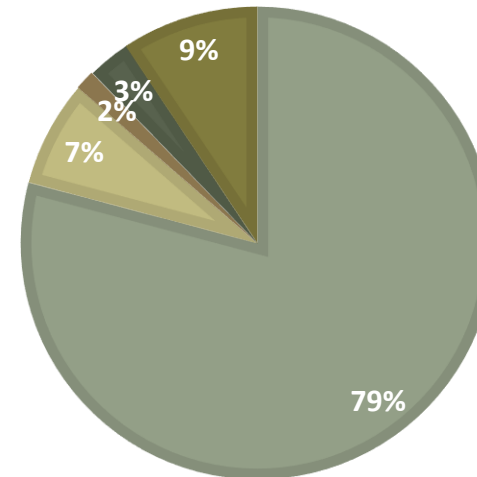
## WORCESTER COUNTY OVERALL

- Single Detached
- Single Attached (Duplex)
- 2-4 Apartments in building
- 5+ Apartments
- Mobile/ Manufactured Home



## UNINCORPORATED AREAS ONLY

- Single Detached
- Single Attached (Duplex)
- 2-4 Apartments in building
- 5+ Apartments
- Mobile/ Manufactured Home



# Employment

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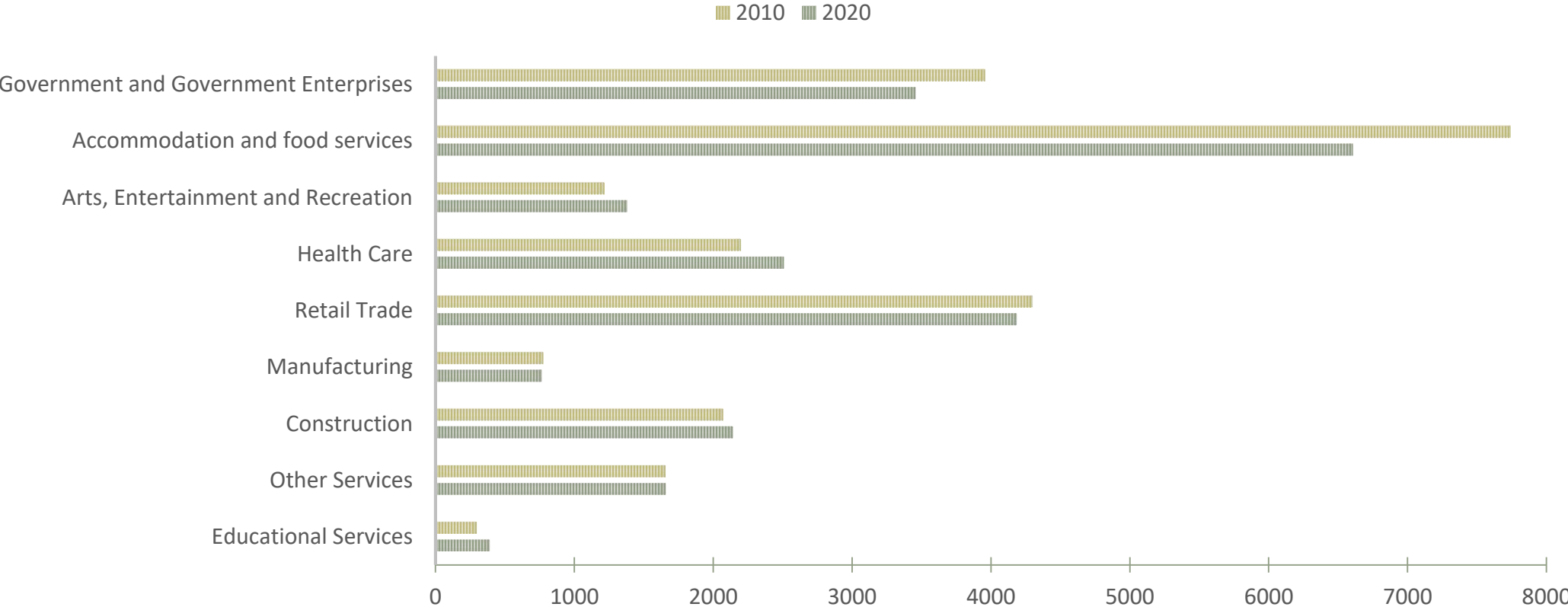
The unemployment rate in Worcester County as of July 2022 is 5.0% according to the US Bureau of Labor Statistics.

The top employers in Worcester County can be found in the following industries:

- Accommodation and Food Services
- Health Care
- Retail Trade
- Arts, Entertainment and Recreation
- Manufacturing
- Construction
- Other Services
- Educational Services
- Government and Government Enterprises

Source: MD Dept of Commerce, October 2015, Bureau of Economic Analysis, Total Full-Time and Part-Time Employment by NAICS Industry

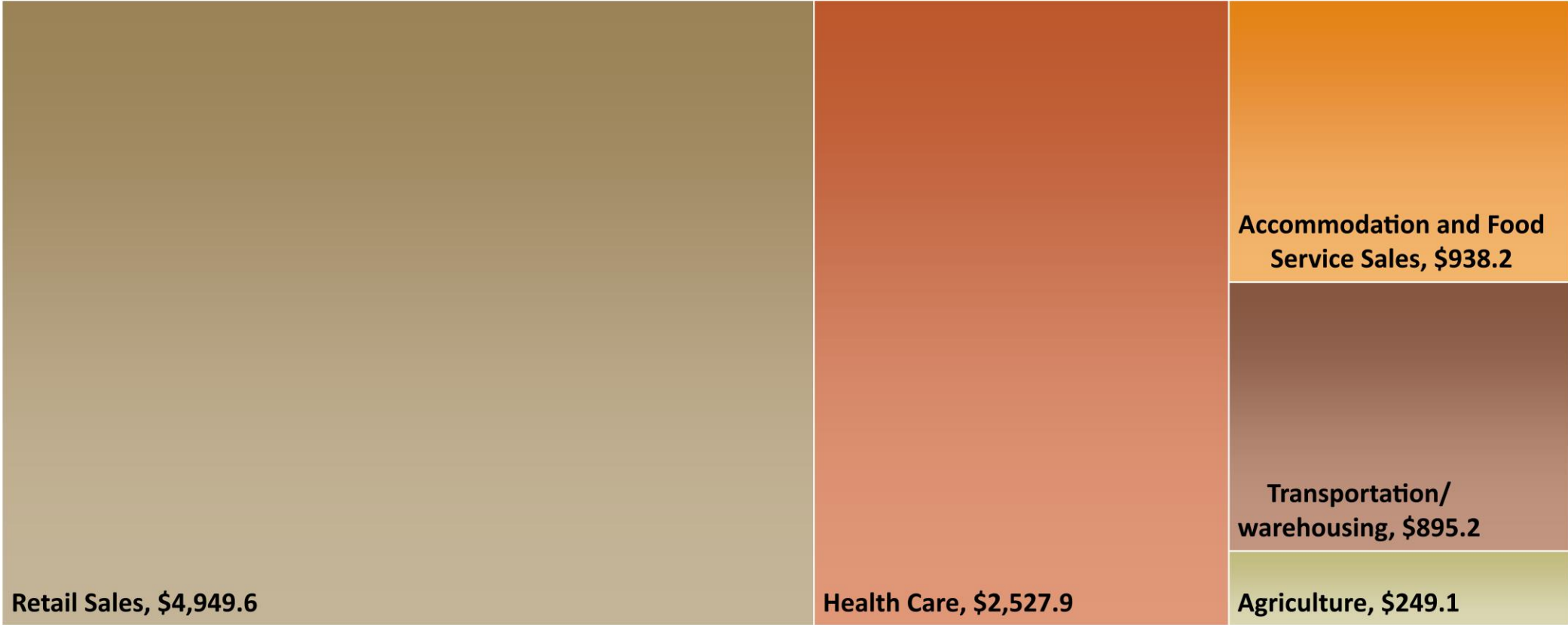
# Number of Jobs in Select Industries



Source: Bureau of Economic Analysis, Total Full-Time and Part-Time Employment by NAICS Industry

# Economy at a Glance

(Revenues per \$1,000)



Source: US Census Bureau, Economic Census, 2017 & Census of Agriculture, 2017

# Conclusions

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Worcester County has experienced positive growth over the past 50 years, driven by net migration, with a higher area median income than surrounding Lower Shore counties, reaffirming that Worcester County is a great place to work, live and play.

While housing stock is in great abundance, housing affordability continues to be an issue of great concern, especially among renters.

Worcester County's economy will continue to grow in the health care services sector to serve existing and anticipated residents in our community as they age.

Protection of the agricultural backbone of the county will be important to our predominantly rural way of life, while still allowing economic growth in that sector.

# Next Steps...

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## Public Engagement

- A Request for Proposals (RFP) is being finalized that will allow us to engage a consultant to conduct a public engagement program.
- The role of the consultant is to plan, prepare for, and facilitate the direct outreach to Worcester County residents, engage in data collection, and develop a report containing a set of recommendations and action items based upon information gained from the public engagement effort.

## Development Capacity Analysis (DCA)

- DRP has been working with the Maryland Department of Planning (MDP) to prepare a Development Capacity Analysis. This “build-out” analysis is an estimate of the total amount of development that can be built in an area under a certain set of assumptions, such as existing zoning, land-use laws, and environmental constraints.
- This estimate will help the Planning Commission determine how and where to adequately plan for future growth.