

# Growth Trends to 2025:

## Cooperative Forecasting in the Washington Region

Summer 2000

Local governments in the Washington region have worked cooperatively for many years to develop region-wide and neighborhood level forecasts of employment, households, and population. Through this effort, a consistent set of local and regional forecasts is developed for use in program and facilities planning throughout the region.

The Cooperative Forecasting Program, established in 1975 and administered by the Metropolitan Washington Council of Governments (COG), enables local and regional planning to be coordinated by using common assumptions about future growth and development. Each series of forecasts is referred to as a "Round," and each round covers a period of 20 to 30 years.

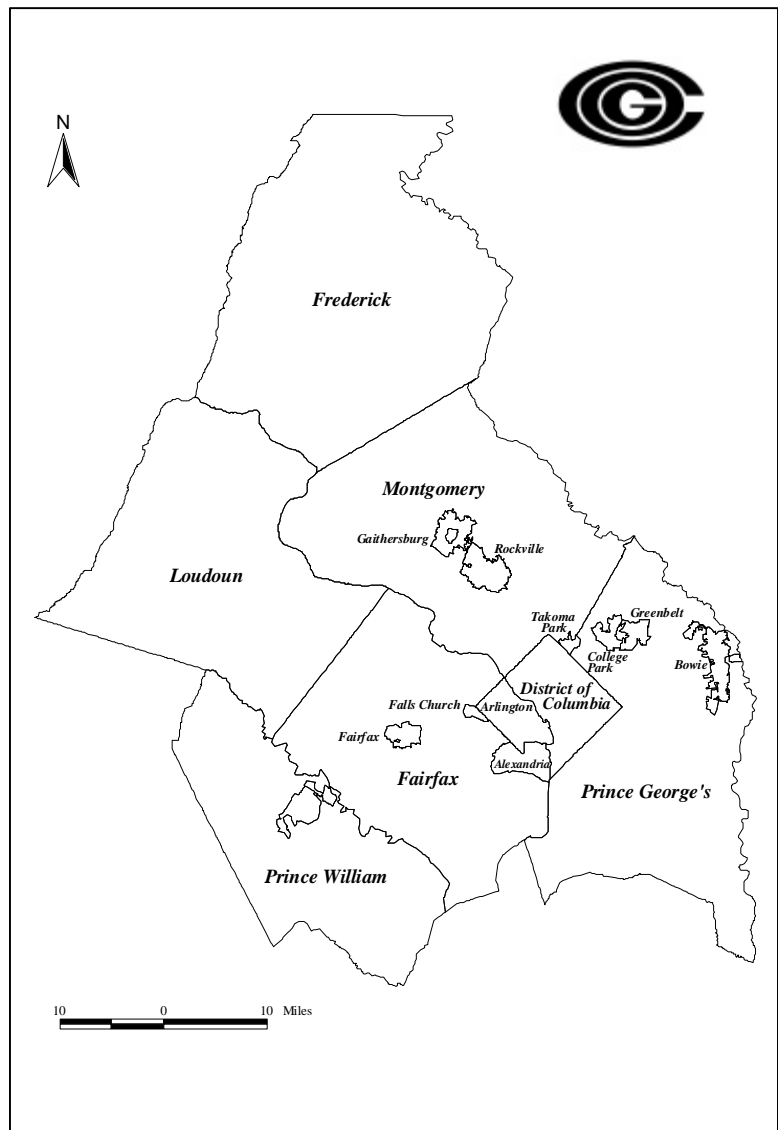
The Cooperative Forecasting process provides the data necessary for regional planning activities including the analysis of the effects of growth and the development of policy responses to regional issues. In addition, the forecasts are used to determine the demand for public facilities including schools, parks, medical facilities, roads, stores, and services.

### Process

Development of the Cooperative Forecasts is a multi-stage, "top-down/bottom-up" process involving COG's regional economic model and jurisdictional forecasts. The regional model projects employment, households, and population for the Washington metropolitan area based on national economic trends and local demographic factors. At the same time, local jurisdictions develop projections of population, households and employment based on pipeline development, market conditions, planned transportation improvements, and adopted land use plans and zoning, taking into account the preliminary regional projections.

Local government planners, economists, and demographers, working through COG's Cooperative Forecasting Subcommittee, then reconcile the two sets of projections. The local forecasts may be adjusted to reflect any impacts of growth on the transportation network. Once completed, the forecasts are approved by the COG Board of Directors, which is composed of local elected officials from throughout the region.

### Membership of the Metropolitan Washington Council of Governments



For each Round, forecasts are produced for three scenarios – high, intermediate, and low – reflecting the range of uncertainty about long-range market and development trends. Recognizing that market conditions and policies may change, the subcommittee also reviews the forecasts annually, and local governments make minor adjustments to reflect these changes. These updated forecasts are referred to as Round 5.1, Round 5.2, etc. The forecasts in this report are Round 6.2, intermediate series, as adopted by the COG Board in April 2000.

The Round 6.2 Forecasts reveal dramatic increases in employment, households, and population by 2025, the end of the forecast period. Under the intermediate scenario, regional employment would total nearly 3.9 million jobs by 2025, a 39 percent increase over the 2000 employment base of 2.8 million jobs. Also, under this scenario, the number of households would reach 2.3 million, a 35 percent increase.

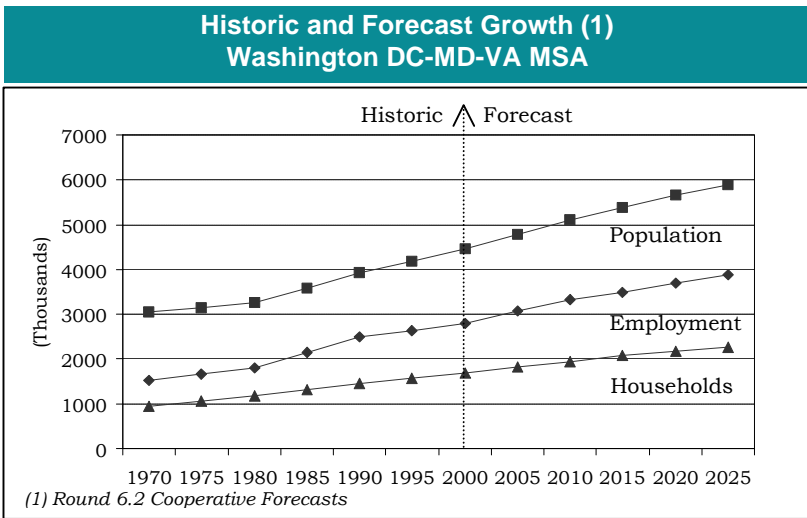
After rapid growth in the 1960s followed by modest growth in the 1970s and early 1980s, the region's population grew rapidly in the late 1980s. By 1990, the population reached 3.9 million residents. Regional population is forecast to increase by 32 percent during the forecast period, reaching nearly 5.9 million in 2025. This will add about the same number of people as during the previous 25-year period.

## Employment

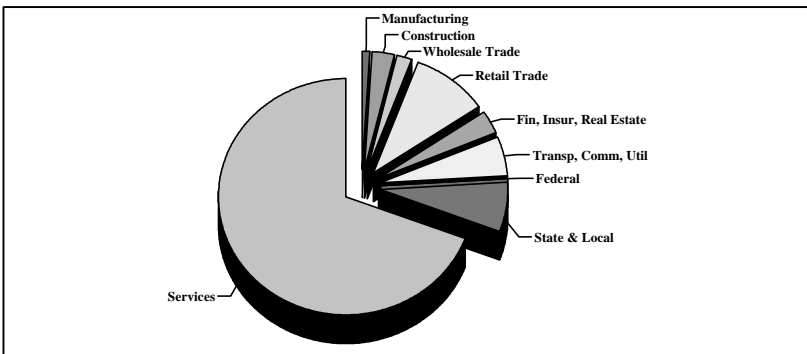
Regional employment, increasing 39 percent from 2000 to 2025, will experience a slightly higher rate of growth than both population and households. Employment growth would be the greatest during the 2000 to 2025 time period when an average of 55,000 new jobs are anticipated – nearly twice the amount of jobs added during the first half of the 1990s. Nearly two-thirds of all new jobs are anticipated in service industries such as engineering, computer and data processing, business services, and medical research. Job growth in Northern Virginia (51%) will outpace growth in the Maryland suburbs (37%), and the District (23%).

Fairfax County, Prince George's County, the District, and Loudoun County would add the largest numbers of new jobs to the region's employment base during the 2000 to 2025 forecast period, followed by Montgomery, Arlington, Frederick and Prince William counties. Collectively, the region's inner suburbs will add the largest number of new jobs, 506,000 by 2025. However, as with population and household growth, the largest percentage increases in employment will occur in the outer suburbs of Virginia and Maryland. Although together they will add only 312,000 jobs to the region's base, they will increase their current employment by 80 percent collectively.

Despite the tremendous growth in suburban employment shown in the forecasts, the District of Columbia would continue to have the largest number of jobs of any single jurisdiction and would account for more than one-fifth of the region's employment. Further, the central jurisdictions, collectively, would account for almost one-third of regional employment.



### More Than Half of All New Jobs in Services (Industry Shares of 2000 – 2025 Growth)



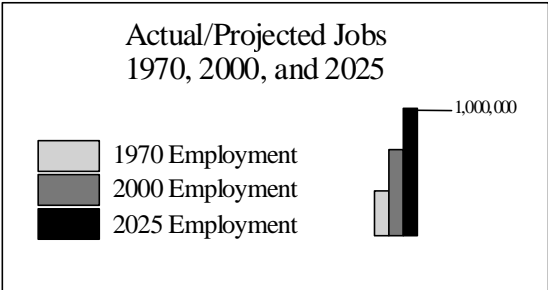
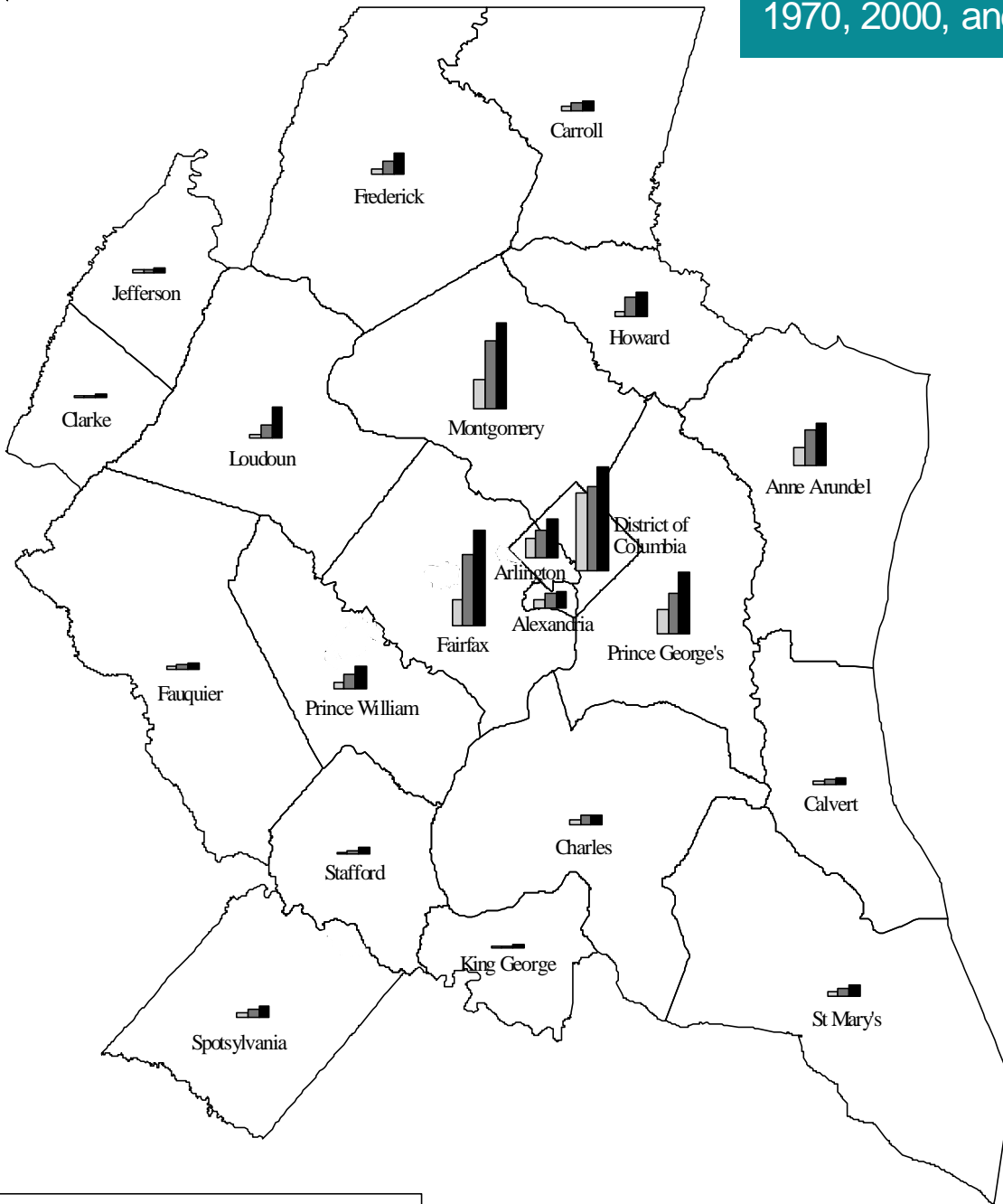
### Employment Forecast by Jurisdiction (1) (Thousands)

JURISDICTION	Employment Forecast by Jurisdiction Round 6.2 Cooperative Forecasts (Thousands)						
	1990	2000	2005	2010	2015	2020	2025
District of Columbia	747.3	678.0	720.4	752.0	783.7	807.1	831.2
Arlington County	183.1	201.2	210.5	236.9	256.2	275.4	294.7
City of Alexandria	93.2	98.6	105.8	110.4	113.2	115.9	119.0
<b>Central Jurisdictions</b>	<b>1,023.6</b>	<b>977.8</b>	<b>1,036.7</b>	<b>1,099.3</b>	<b>1,153.1</b>	<b>1,198.4</b>	<b>1,244.9</b>
Montgomery County (1)	466.0	536.0	589.0	626.0	641.0	660.0	675.0
Rockville (2)	56.9	73.0	78.8	83.0	85.3	86.6	87.3
Prince George's County	310.4	325.3	357.3	385.2	410.2	449.1	488.3
Fairfax County	403.7	526.4	589.3	644.4	671.7	701.3	727.8
City of Fairfax (3)	26.9	30.8	31.8	32.6	32.7	32.7	32.7
City of Falls Church	9.2	9.4	9.5	9.6	9.6	9.7	9.7
<b>Inner Suburbs</b>	<b>1,216.1</b>	<b>1,428.0</b>	<b>1,576.9</b>	<b>1,697.7</b>	<b>1,765.2</b>	<b>1,852.8</b>	<b>1,933.5</b>
Loudoun County	39.3	85.3	117.9	145.5	173.7	202.7	232.8
Prince William County	68.8	90.6	104.9	118.5	130.0	141.2	152.7
Manassas & Manassas Park	18.7	21.6	23.2	24.7	25.3	25.4	25.4
Calvert County (4)	18.1	24.8	26.9	28.3	29.2	29.7	29.7
Charles County (4)	38.7	50.6	54.4	58.2	59.8	61.4	63.2
Frederick County	54.0	99.7	109.2	120.7	134.6	148.5	162.5
Stafford County (5)	11.0	18.2	21.8	25.4	29.0	32.5	36.1
Anne Arundel County (6)	249.4	274.3	289.8	302.8	310.6	313.5	328.1
Howard County (6)	106.3	138.8	153.1	164.4	175.7	187.0	187.0
<b>Outer Suburbs (6)</b>	<b>248.6</b>	<b>390.8</b>	<b>458.4</b>	<b>521.3</b>	<b>581.6</b>	<b>641.5</b>	<b>702.3</b>
<b>Northern Virginia</b>	<b>853.8</b>	<b>1,082.2</b>	<b>1,214.8</b>	<b>1,348.0</b>	<b>1,441.4</b>	<b>1,536.8</b>	<b>1,630.8</b>
<b>Suburban Maryland (6)</b>	<b>887.1</b>	<b>1,036.4</b>	<b>1,136.8</b>	<b>1,218.4</b>	<b>1,274.8</b>	<b>1,348.7</b>	<b>1,418.6</b>
<b>REGIONAL TOTAL (6)</b>	<b>2,488.3</b>	<b>2,796.6</b>	<b>3,071.9</b>	<b>3,318.3</b>	<b>3,499.9</b>	<b>3,692.6</b>	<b>3,880.7</b>

(1) Forecasts for years 2000 to 2025 include all of Takoma Park.  
(2) Included in Montgomery County total.  
(3) Totals for all years include Fairfax County Government employees working in the Massey Complex, located within the boundaries of the City of Fairfax.  
(4) Tri-County Council for Southern Maryland develops ten-year incremental population, housing unit and employment forecasts for Calvert County, Charles County and St. Mary's County.  
(5) Source: Rappahannock Area Development Commission, November 1997.  
(6) Forecasts for Anne Arundel and Howard counties are shown for reference purposes only and are not included in any other totals. Anne Arundel and Howard counties participate in the Cooperative Forecasting programs of the Baltimore Metropolitan Council and the Metropolitan Washington Council of Governments.

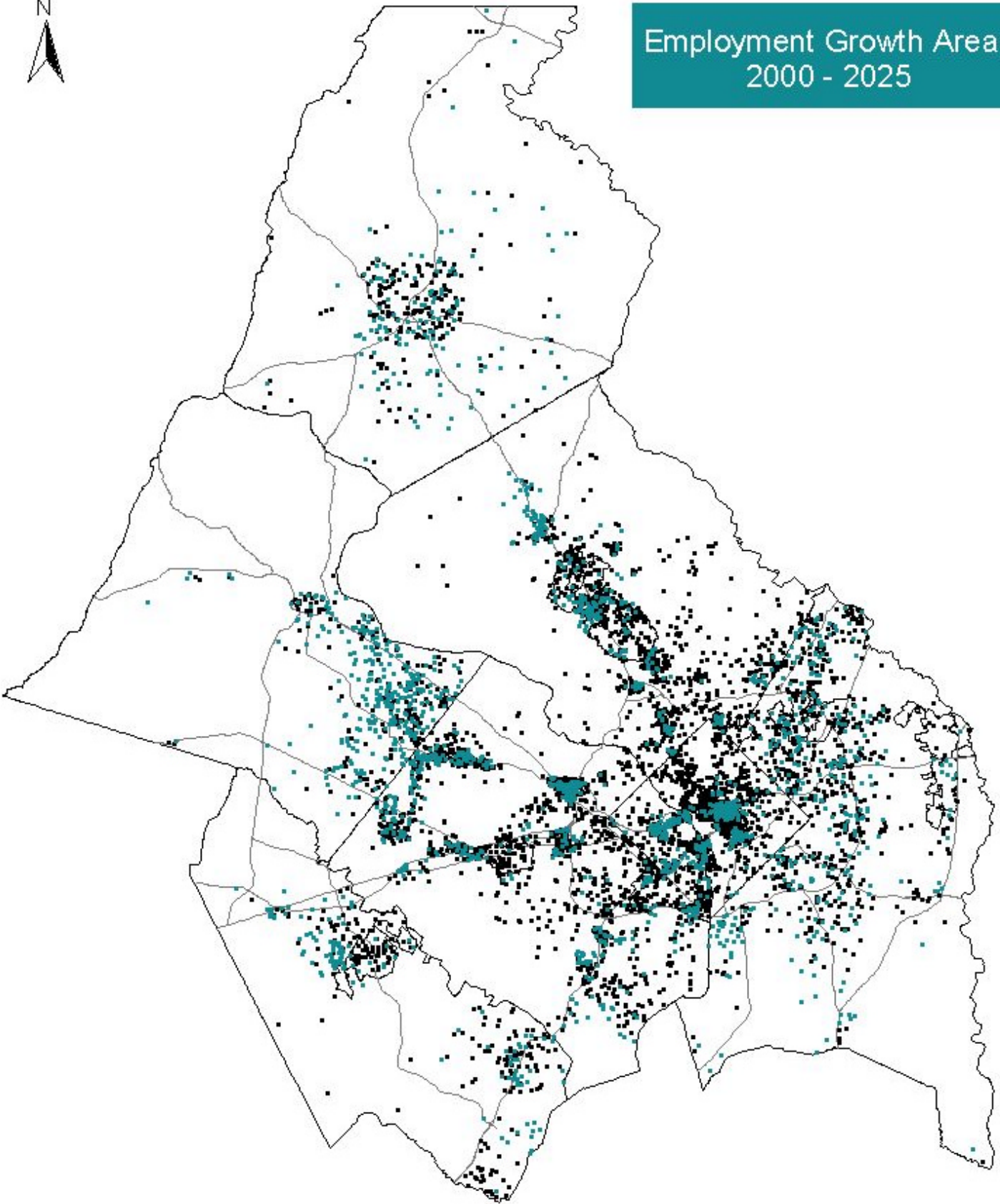


# Actual/Projected At-Place Employment 1970, 2000, and 2025





# Employment Growth Areas 2000 - 2025



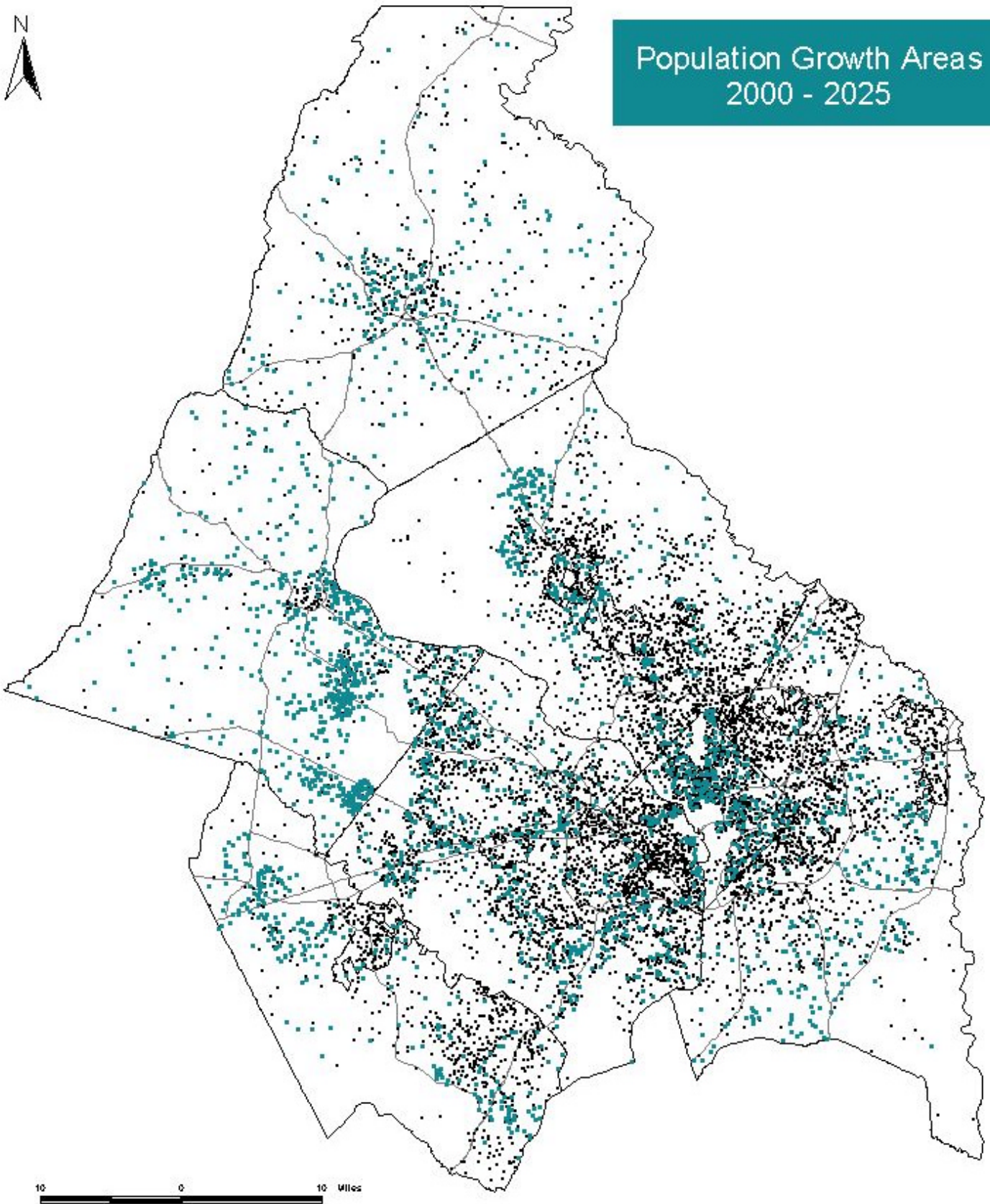
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Note: One dot represents 500 jobs. Black dots indicate 2000 employment, green dots indicate 2000 to 2025 employment increase.





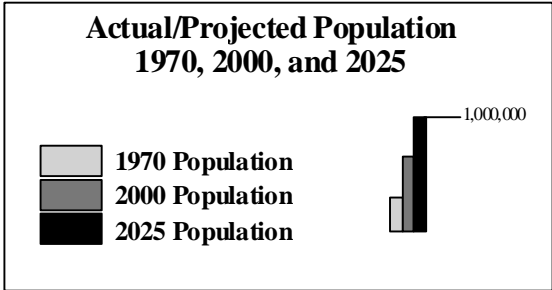
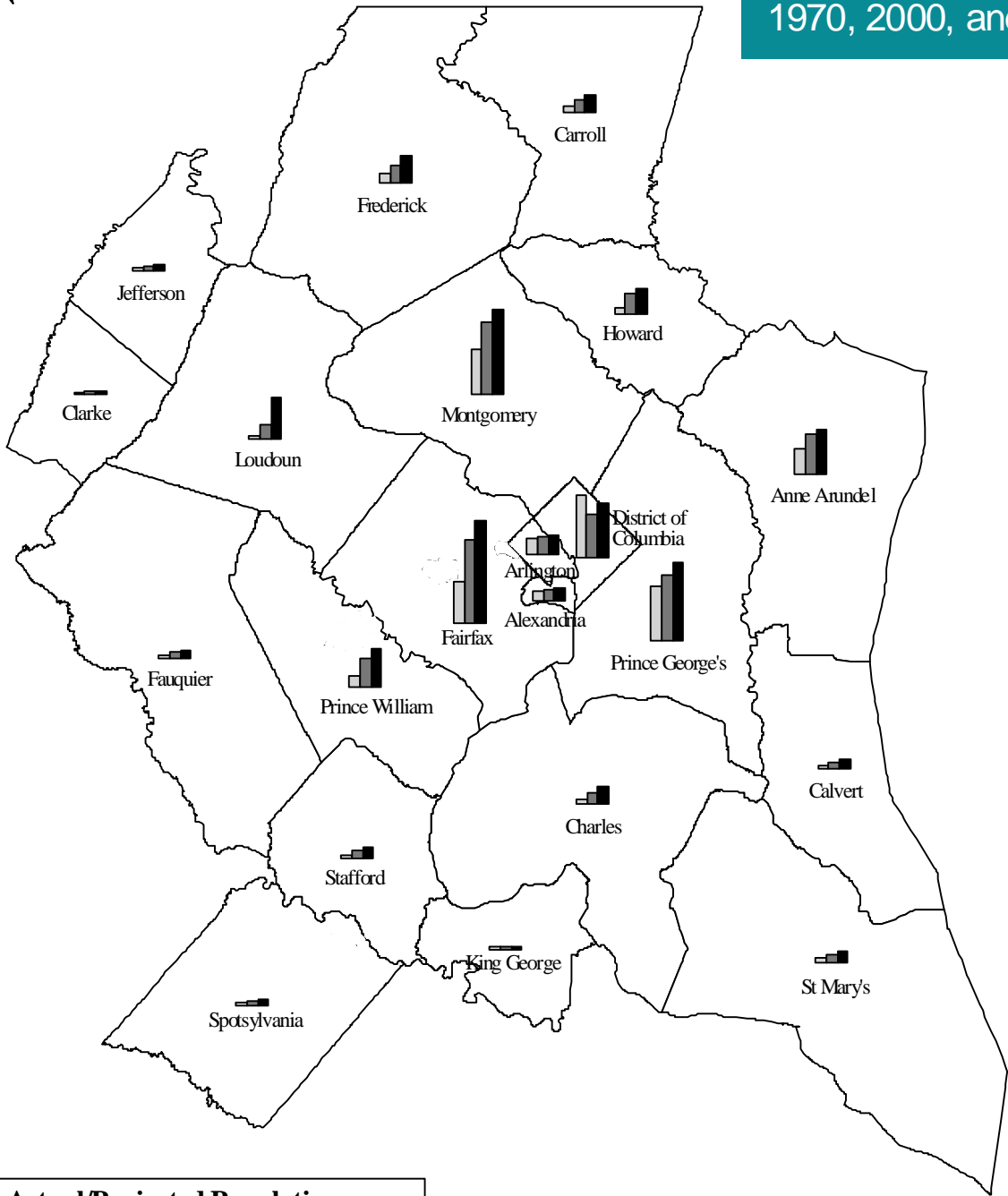
# Population Growth Areas 2000 - 2025



Note: One dot represents 500 persons. Black dots indicate 2000 population, green dots indicate 2000 to 2025 population increase.



**Actual/Projected  
Population  
1970, 2000, and 2025**



# Households

Regional economic growth will continue to attract new residents and fuel a general demand for new housing. Households, or occupied housing units, in turn form the basis for population forecasts for most jurisdictions participating in the Cooperative Forecasting process. Planners monitor housing construction and estimate population growth by multiplying the number of occupied housing units by the average number of people in the jurisdictions' households.

The forecast increase of more than 595,000 households during the 2000 to 2025 forecast period reflects the growth in jobs and in-migration to the region. The largest number of new households will be in Loudoun, Fairfax, and Montgomery counties, which collectively contribute nearly 50 percent of the household growth during the forecast period. Loudoun County will grow the most rapidly of all jurisdictions, adding nearly 119,000 households to a 2000 base of 61,000 households.

# Population

The region's population is expected to grow steadily through the forecast period, adding an average of approximately 58,000 persons a year. Population will be spurred by: the long-term strength of the region's economy; high rates of in-migration and international immigration; and less rapid declines in average household size than were previously anticipated. The region's population 65 years of age and older will more than double from 2000 to 2025, while the number of children will increase by about 30 percent during the period.

Most of the population growth will be in Loudoun, Fairfax and Montgomery counties. The outer jurisdictions, however, will experience the fastest rates of growth, led by Loudoun (195%), Charles (59%), and Frederick (56%) counties. The region's central jurisdictions will grow more slowly. In Arlington County and the City of Alexandria, population will increase by 14 and 15 percent, respectively. The District of Columbia will experience an end of short-term population loss and will grow by 25 percent during the forecast period.

## Household Forecast by Jurisdiction (1) (Thousands)

### Household Forecast by Jurisdiction Round 6.2 Cooperative Forecasts (Thousands)

JURISDICTION	1990	2000	2005	2010	2015	2020	2025
District of Columbia	249.6	221.8	224.3	235.4	247.2	256.3	265.9
Arlington County	78.5	90.1	94.0	97.4	100.8	104.1	107.4
City of Alexandria	53.3	61.5	63.6	65.5	67.2	68.6	70.9
<b>Central Jurisdictions</b>	<b>381.4</b>	<b>373.4</b>	<b>381.9</b>	<b>398.3</b>	<b>415.2</b>	<b>429.0</b>	<b>444.3</b>
Montgomery County (1)	282.0	317.5	336.5	356.5	376.5	392.0	402.0
Rockville (2)	15.7	18.0	19.3	20.5	20.5	20.6	20.6
Prince George's County	258.0	290.4	307.0	322.6	338.1	354.1	368.0
Fairfax County	292.3	353.4	385.9	412.5	428.0	438.1	445.0
City of Fairfax	7.4	8.2	8.4	8.6	8.7	8.7	8.7
City of Falls Church	4.2	4.7	4.8	4.9	4.9	5.0	5.0
<b>Inner Suburbs</b>	<b>843.9</b>	<b>974.2</b>	<b>1,042.6</b>	<b>1,105.1</b>	<b>1,156.2</b>	<b>1,197.9</b>	<b>1,228.7</b>
Loudoun County	30.7	60.6	84.3	108.1	131.8	155.6	179.3
Prince William County	69.7	94.7	108.4	120.1	127.7	133.9	140.4
Manassas & Manassas Park	11.7	14.7	15.3	15.6	15.8	16.0	16.2
Calvert County (3)	17.0	23.4	25.9	28.4	30.3	32.2	34.1
Charles County (3)	32.9	42.0	47.6	53.3	63.3	67.4	75.3
Frederick County	52.6	70.6	79.4	88.2	97.1	105.9	114.7
Stafford County (4)	19.4	25.7	28.9	32.0	35.1	38.3	41.4
Anne Arundel County (6)	149.1	176.1	188.5	197.1	207.1	217.0	218.6
Howard County (6)	68.3	94.9	108.6	117.7	122.4	122.4	122.4
<b>Outer Suburbs (5)</b>	<b>233.9</b>	<b>331.6</b>	<b>389.8</b>	<b>445.7</b>	<b>501.0</b>	<b>549.3</b>	<b>601.5</b>
Northern Virginia	567.2	713.5	793.5	864.8	920.0	968.2	1,014.3
Suburban Maryland (5)	642.5	743.9	796.4	848.9	905.2	951.7	994.2
<b>REGIONAL TOTAL (5)</b>	<b>1,459.3</b>	<b>1,679.2</b>	<b>1,814.3</b>	<b>1,949.1</b>	<b>2,072.4</b>	<b>2,176.2</b>	<b>2,274.4</b>

- (1) Forecasts for years 2000 to 2025 include all of Takoma Park.  
 (2) Included in Montgomery County total.  
 (3) Tri-County Council for Southern Maryland develops ten-year incremental population, housing unit and employment forecasts for Calvert County, Charles County and St. Mary's County.  
 (4) Source: Rappahannock Area Development Commission. The estimates for 2025 are control totals provided by the Virginia Employment Commission (VEC) and should only be used for transportation planning purposes. Incremental five-year estimates have been developed for the purpose of transportation modeling and air quality analysis.  
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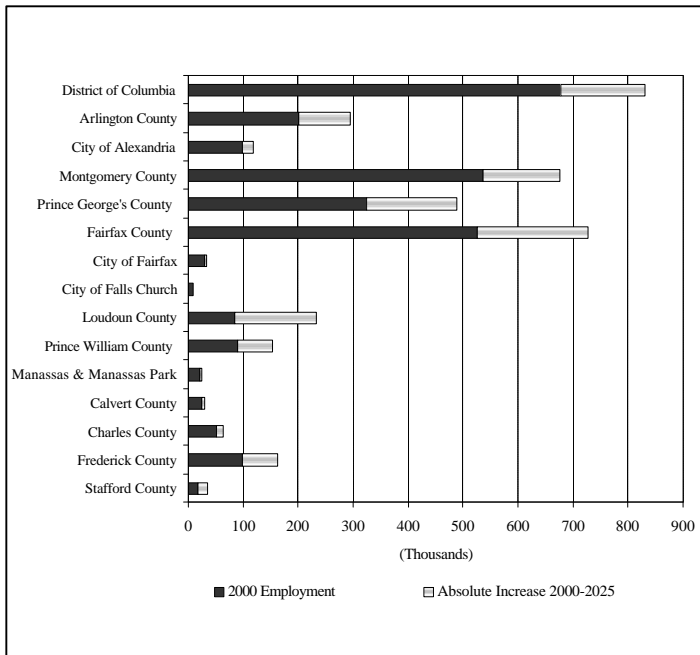
## Population Forecast by Jurisdiction (1) (Thousands)

### Population Forecast by Jurisdiction Round 6.2 Cooperative Forecasts (Thousands)

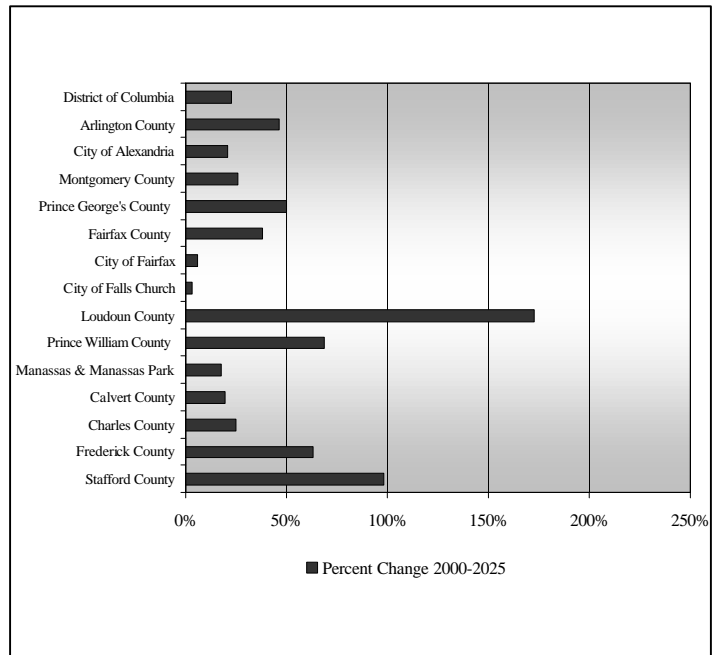
JURISDICTION	1990	2000	2005	2010	2015	2020	2025
District of Columbia	606.9	518.1	523.5	554.7	588.0	618.6	648.4
Arlington County	170.9	192.0	198.2	201.4	207.2	212.9	218.1
City of Alexandria	111.2	127.1	131.3	135.3	138.7	140.9	146.1
<b>Central Jurisdictions</b>	<b>889.0</b>	<b>837.2</b>	<b>853.0</b>	<b>891.4</b>	<b>933.9</b>	<b>972.4</b>	<b>1,012.6</b>
Montgomery County (1)	757.0	855.0	910.0	945.0	975.0	1,000.0	1,020.0
Rockville (2)	44.8	51.8	55.8	59.1	59.8	60.0	60.0
Prince George's County	729.3	784.6	824.5	852.4	886.1	916.6	940.9
Fairfax County (3)	818.6	968.2	1,045.4	1,112.9	1,155.6	1,184.1	1,203.7
City of Fairfax	19.6	21.7	22.1	22.7	22.8	22.8	22.8
City of Falls Church	9.6	10.4	10.6	10.7	10.8	10.9	10.9
<b>Inner Suburbs</b>	<b>2,334.1</b>	<b>2,639.9</b>	<b>2,812.7</b>	<b>2,943.7</b>	<b>3,050.4</b>	<b>3,134.4</b>	<b>3,198.3</b>
Loudoun County	86.1	172.2	238.2	304.2	371.2	439.0	508.2
Prince William County	215.7	286.1	321.9	350.5	369.2	387.1	405.7
Manassas & Manassas Park	34.7	43.2	44.7	45.4	45.7	46.0	46.4
Calvert County (4)	51.4	75.0	80.8	87.0	91.4	96.0	100.5
Charles County (4)	101.2	123.2	136.7	150.1	166.5	182.9	195.9
Frederick County	150.2	194.9	216.6	238.3	260.0	281.7	303.4
Stafford County (5)	61.2	78.6	87.3	96.0	104.7	113.3	122.0
Anne Arundel County (6)	427.2	480.2	501.0	511.2	522.4	531.5	537.0
Howard County (6)	187.3	253.5	283.8	302.5	309.4	303.5	303.5
<b>Outer Suburbs (6)</b>	<b>700.5</b>	<b>973.1</b>	<b>1,126.1</b>	<b>1,271.5</b>	<b>1,408.7</b>	<b>1,546.0</b>	<b>1,682.1</b>
Northern Virginia	1,527.6	1,899.5	2,099.7	2,279.1	2,425.9	2,557.0	2,683.9
Suburban Maryland (6)	1,789.0	2,032.7	2,168.5	2,272.8	2,379.0	2,477.2	2,560.7
<b>REGIONAL TOTAL (6)</b>	<b>3,923.6</b>	<b>4,450.3</b>	<b>4,791.7</b>	<b>5,106.6</b>	<b>5,392.9</b>	<b>5,652.8</b>	<b>5,893.0</b>

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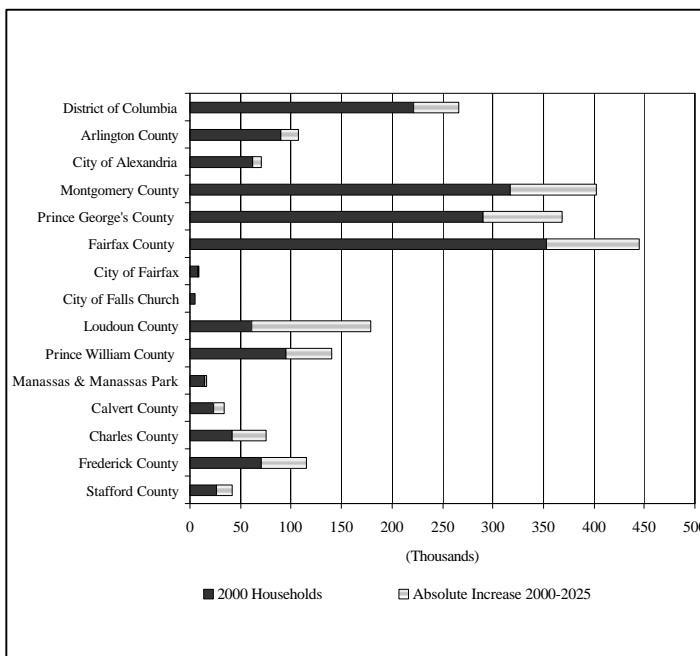
### Employment Growth by Jurisdiction 2000 Employment and Forecast 2000-2025



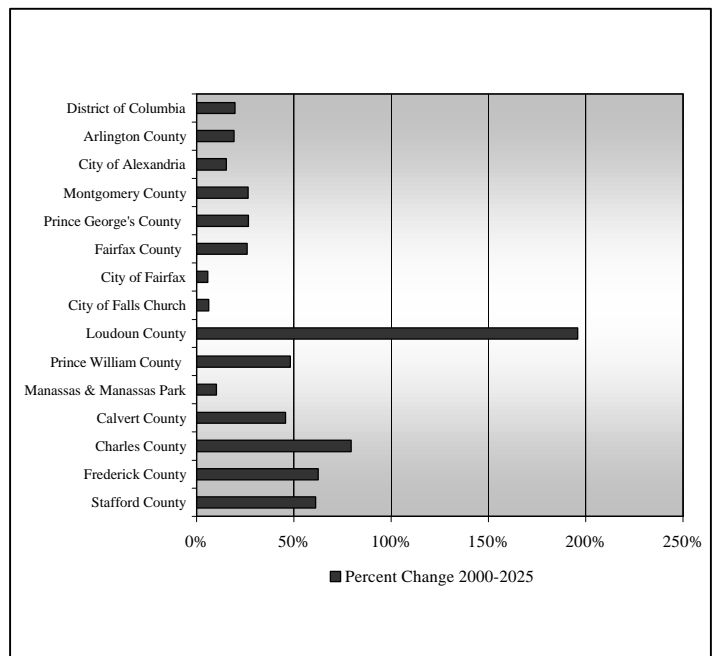
### Percent Employment Growth by Jurisdiction Forecast 2000-2025



### Household Growth by Jurisdiction 2000 Household and Forecast 2000-2025



### Percent Household Growth by Jurisdiction Forecast 2000-2025



The Metropolitan Washington Council of Governments (COG) is the regional organization of the Washington area's major local governments and their governing officials. COG works toward solutions to such regional problems as growth, transportation, inadequate housing, air pollution, water supply, water quality, economic development, and noise, and serves as the regional planning organization for the Washington Metropolitan Region.

The Cooperative Forecasting "Round 6a Technical Report," published by COG, contains more detailed information about the Cooperative Forecasts, including the assumptions and methodologies employed by each jurisdiction. For more information contact the Information Center, Metropolitan Washington Council of Governments, 777 North Capitol Street, N.E. Suite 300, Washington, D.C. 20002-4226; (202) 962-3256, Hours 1-5 p.m.