

Analysis of Round 6.3 Cooperative Forecasts

Metropolitan Development Policy Committee

May 14, 2003

Timeline of Each Major Round

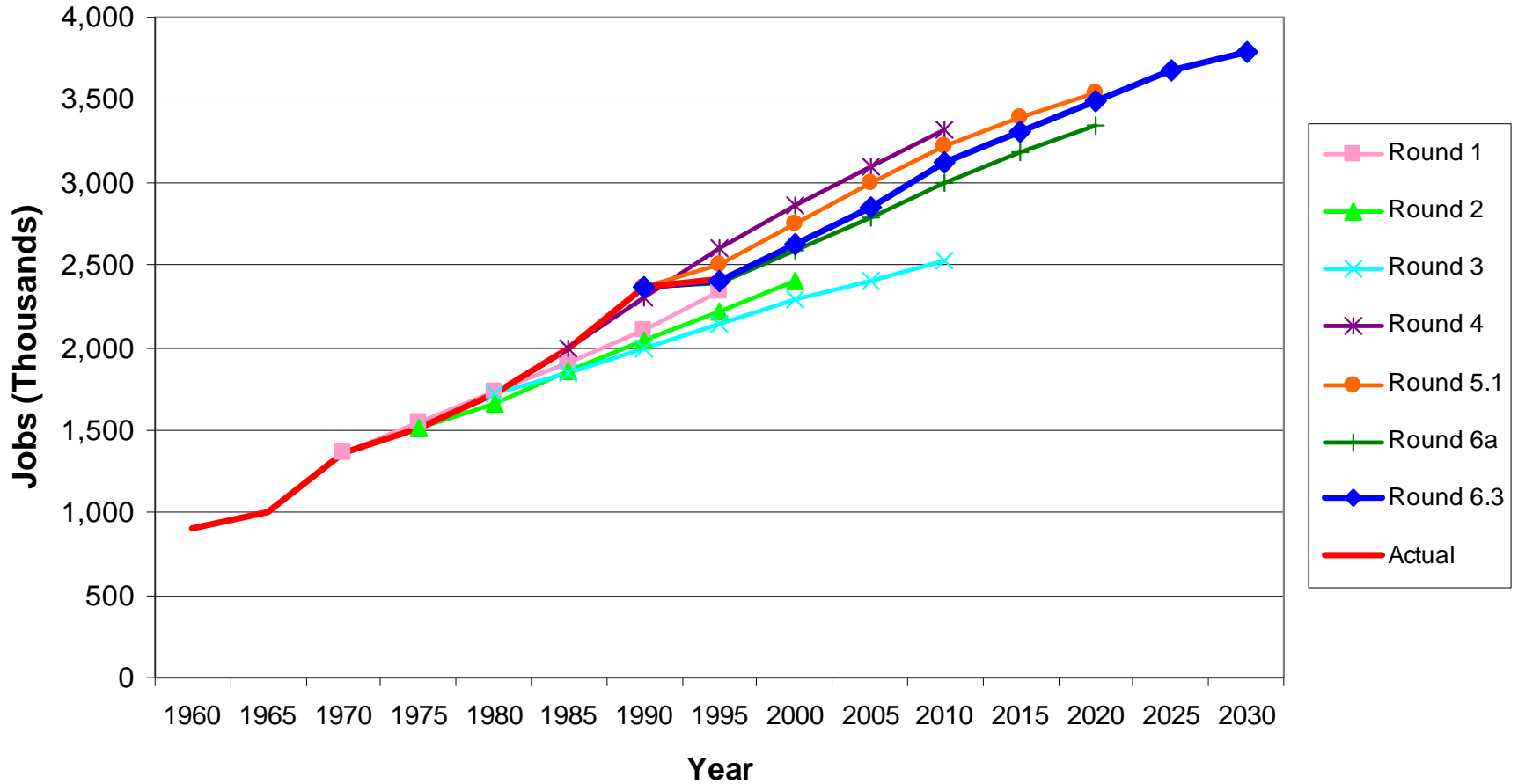
Round	Round Timeframe	Year of Round Update	1960	1965	1970	1975	1980	1985	1990	1995	2000	2005	2010	2015	2020	2025	2030		
Round 1	1970 - 1995	1976			Round 1														
Round 2	1970 - 2000	1979			Round 2														
Round 3	1980 - 2010	1983				Round 3													
Round 4	1985 - 2010	1988					Round 4												
Round 5.1	1990 - 2020	1994						Round 5.1											
Round 6a	1990 - 2020	1998						Round 6a											
Round 6.3	2000 - 2030	2003						Round 6.3											
Actual*	1960 - 2000	Continuous	Actual																

* Based on Census and local jurisdiction estimates

- Each Round has a 25 – 30 year horizon
- Major Rounds typically updated every 4 to 6 years
- Round 6.3 includes improvements from Census 2000 data

Regional Employment Forecasts by Major Round

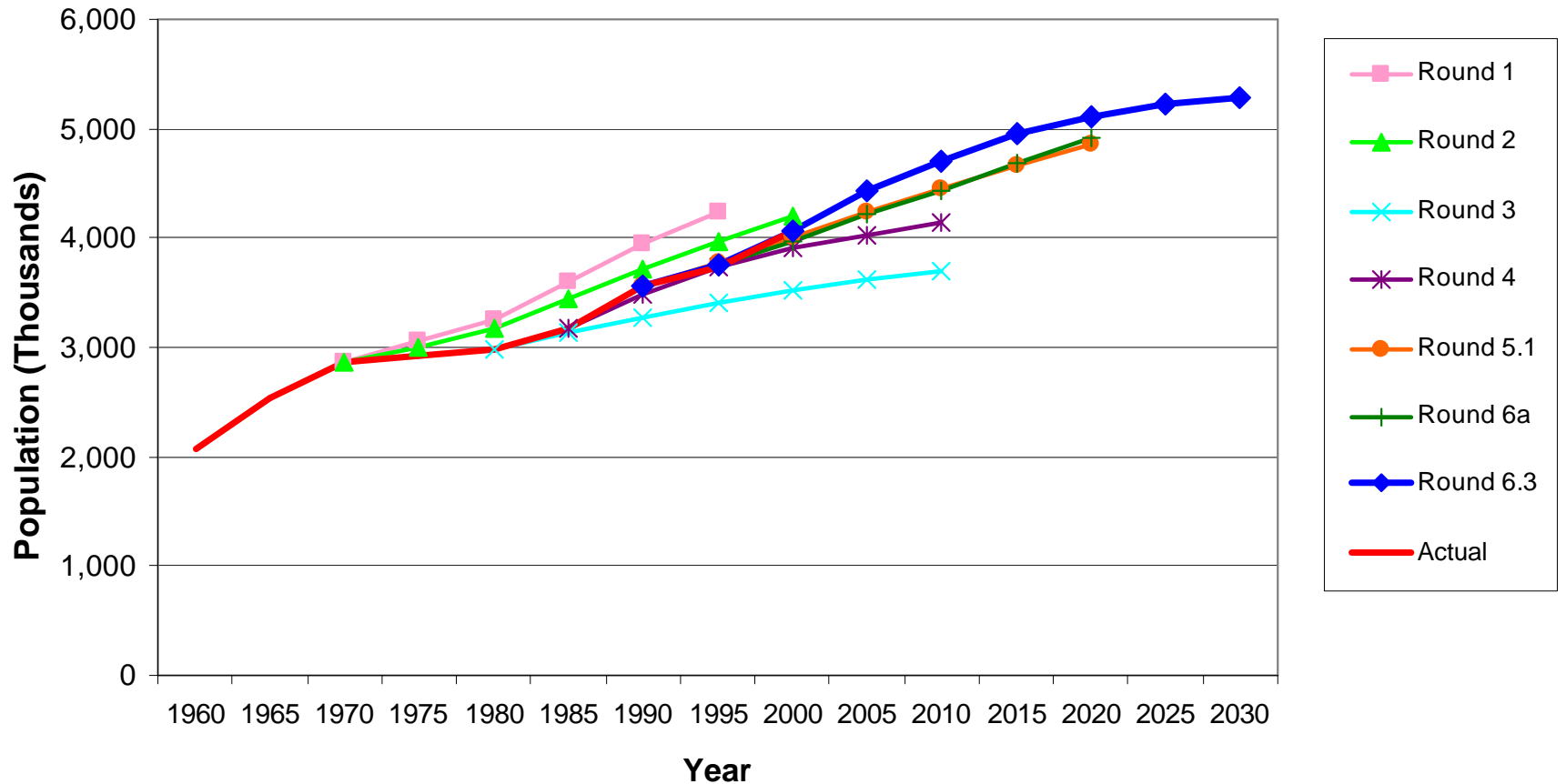
Employment Forecasts by Round Metropolitan Washington Region¹



¹Includes all COG jurisdictions, except for Frederick County

Regional Population Forecasts by Major Round

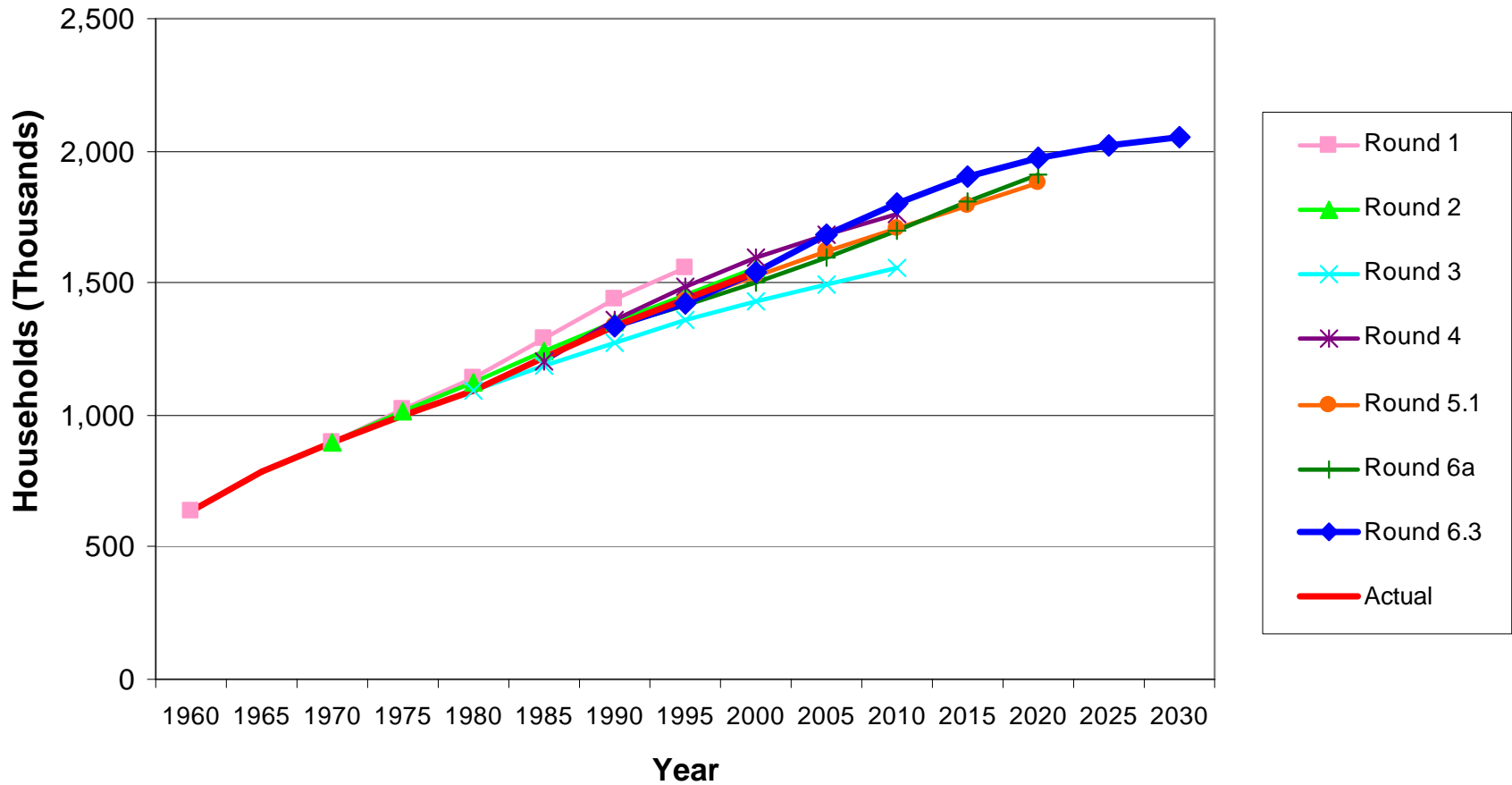
Population Forecasts by Round Metropolitan Washington Region¹



¹Includes all COG jurisdictions, except for Frederick County

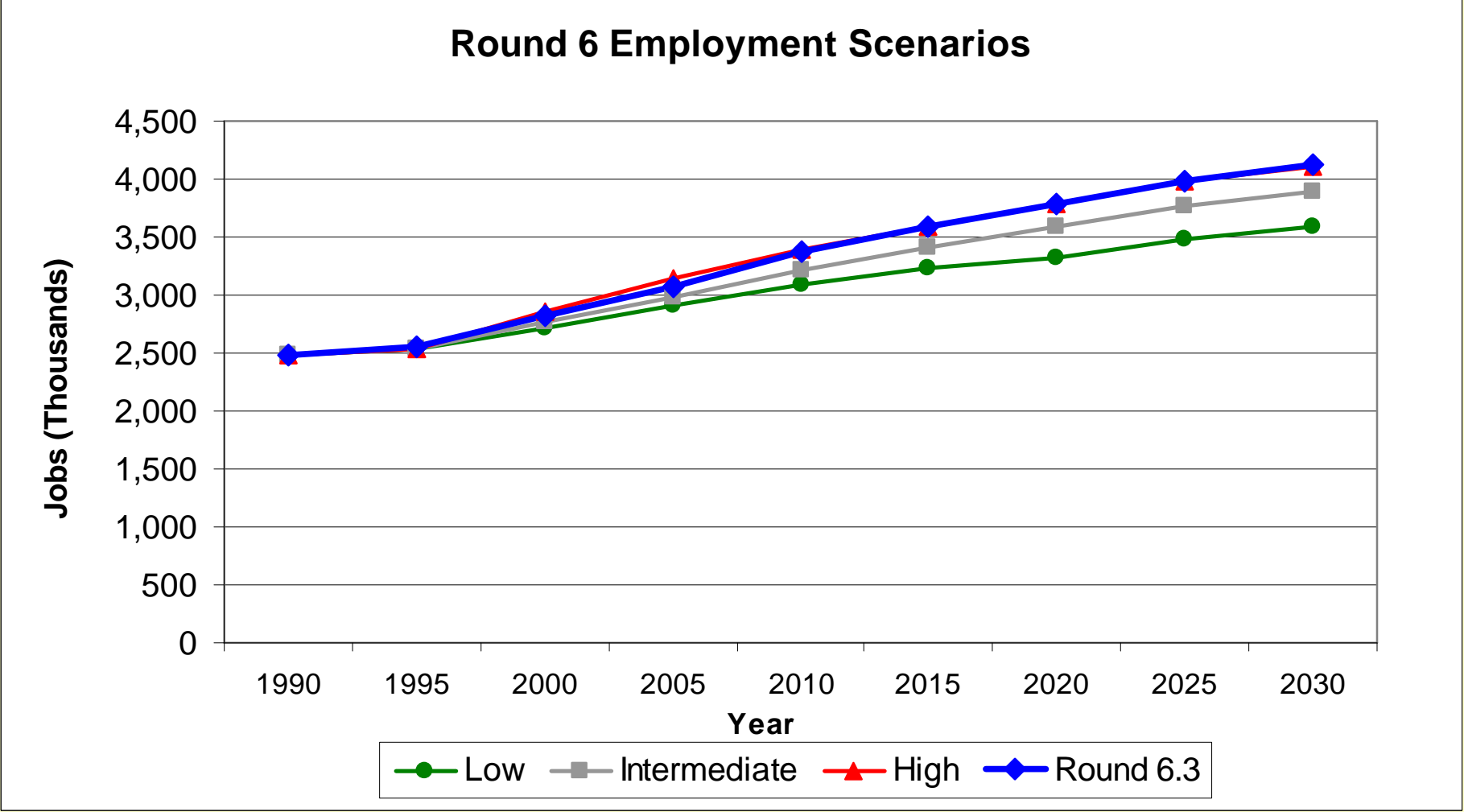
Regional Household Forecasts by Major Round

Household Forecasts by Round Metropolitan Washington Region¹



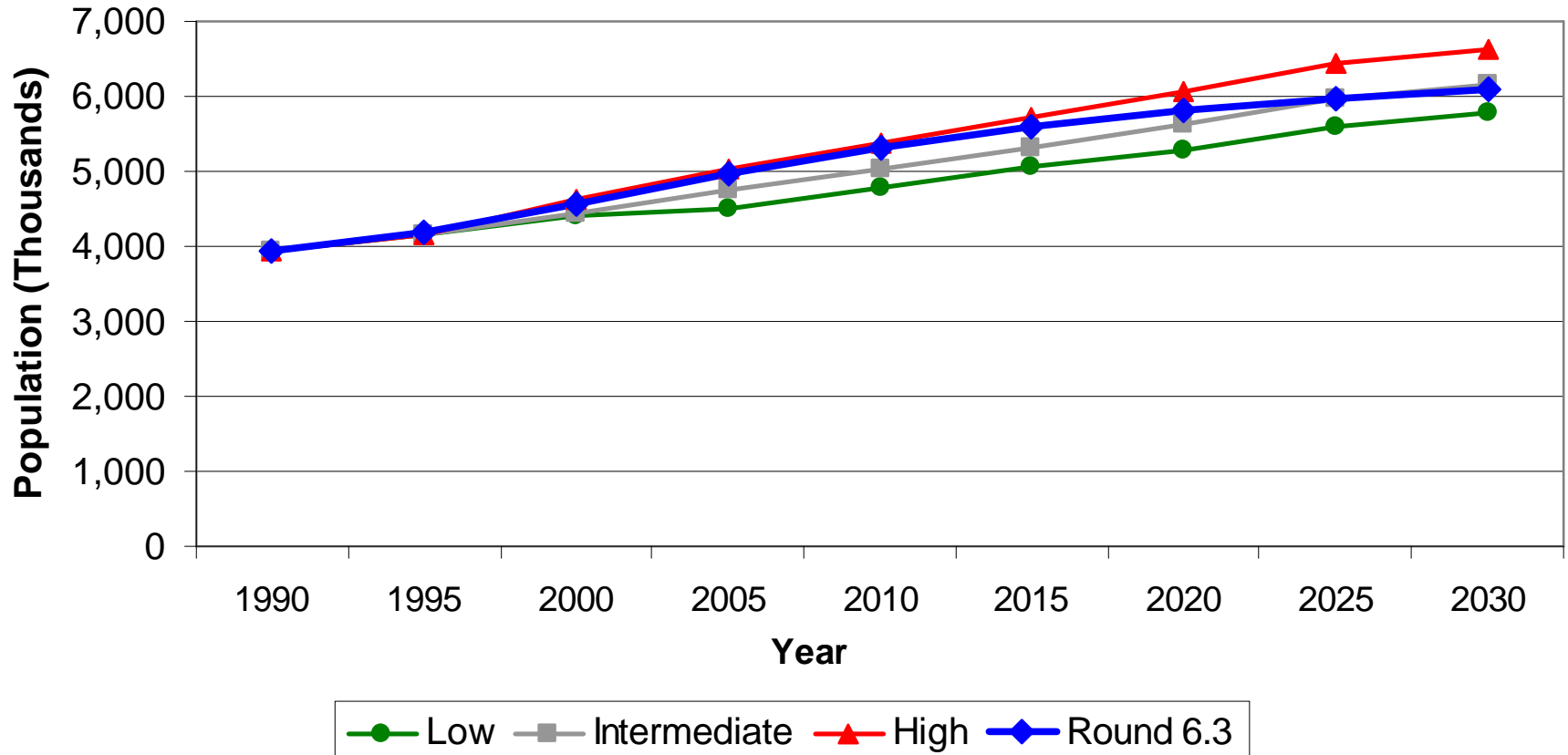
¹Includes all COG jurisdictions, except for Frederick County

Regional Employment Scenarios for Round 6

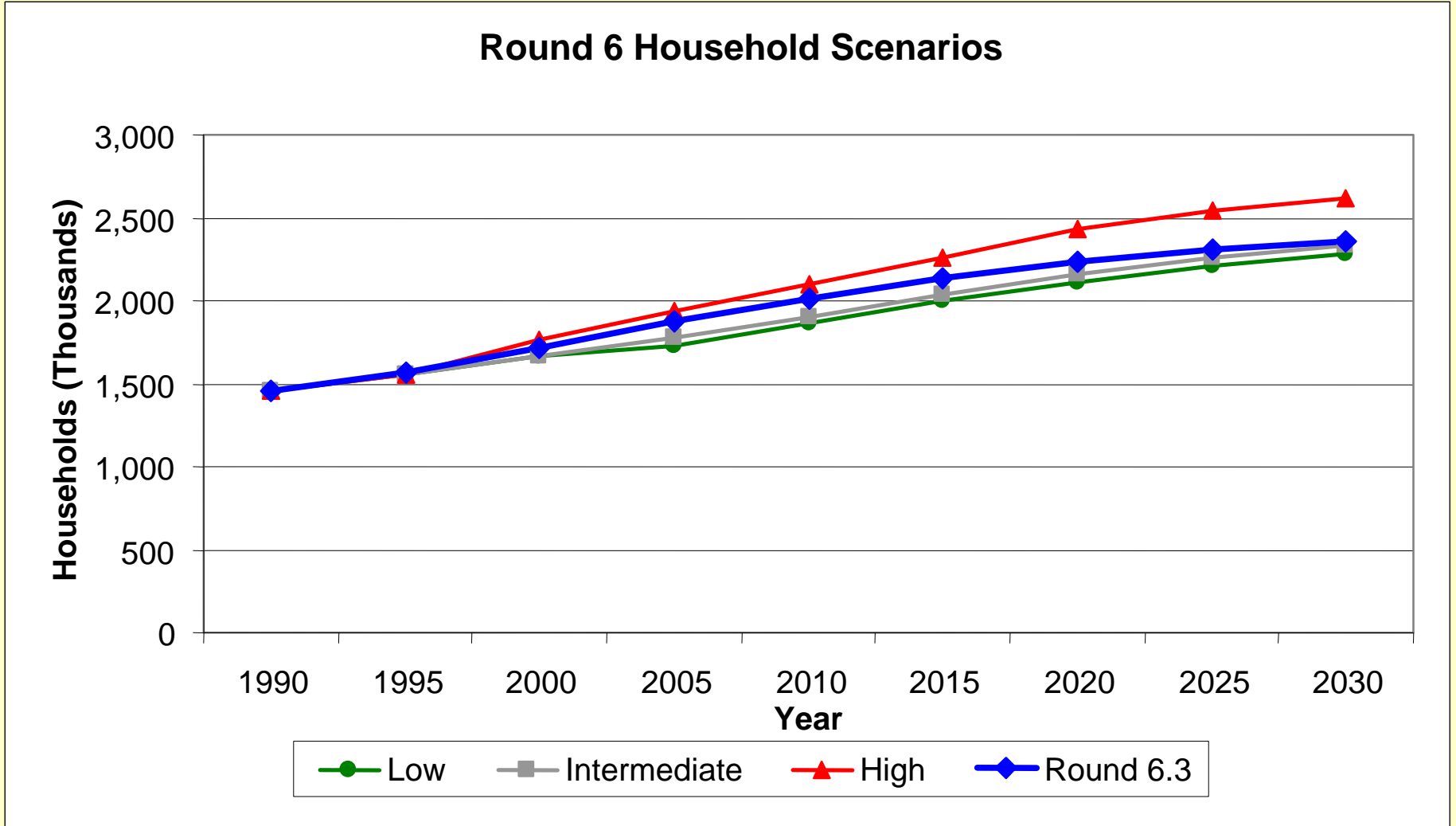


Regional Population Scenarios for Round 6

Round 6 Population Scenarios

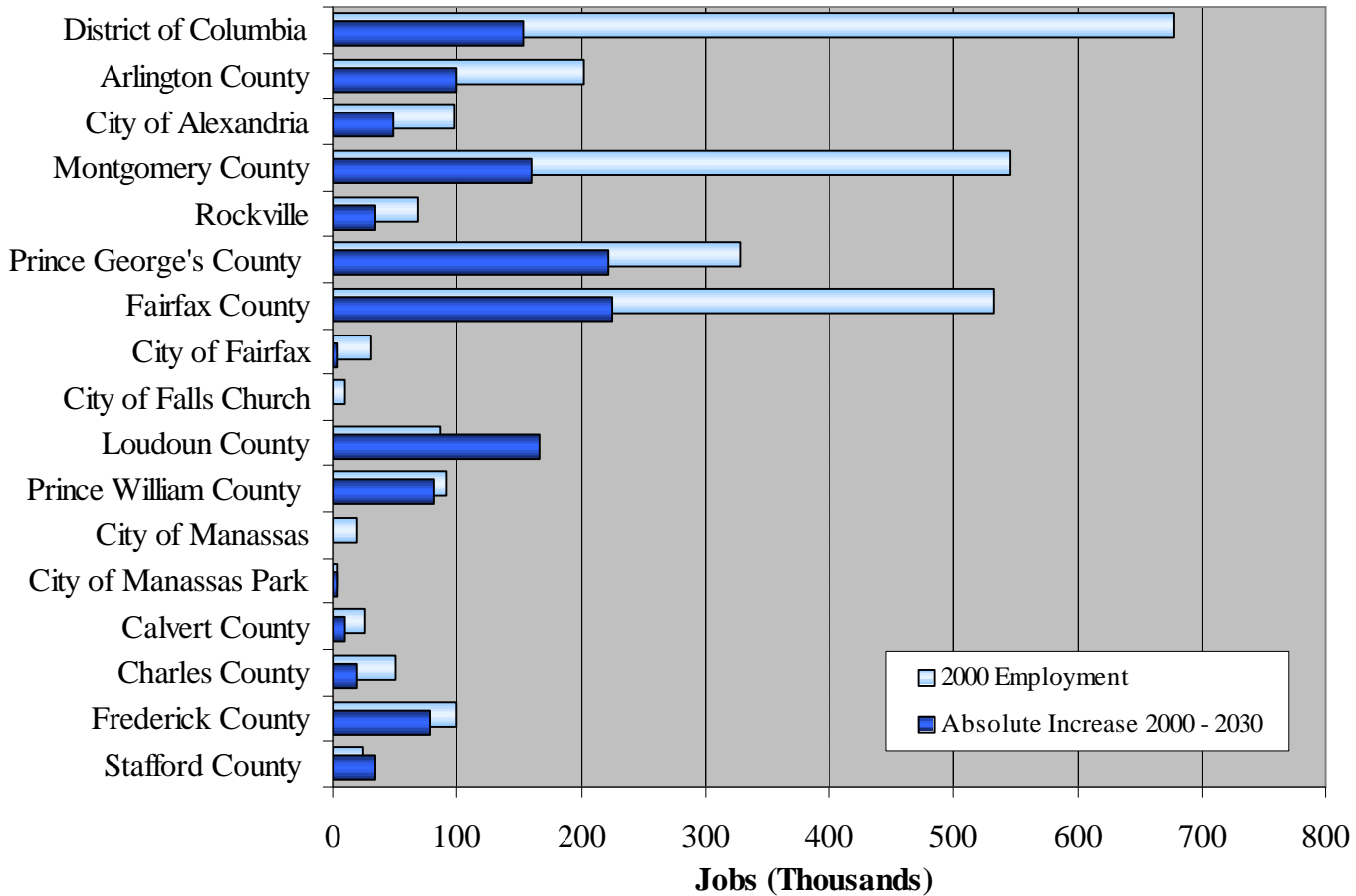


Regional Household Scenarios for Round 6



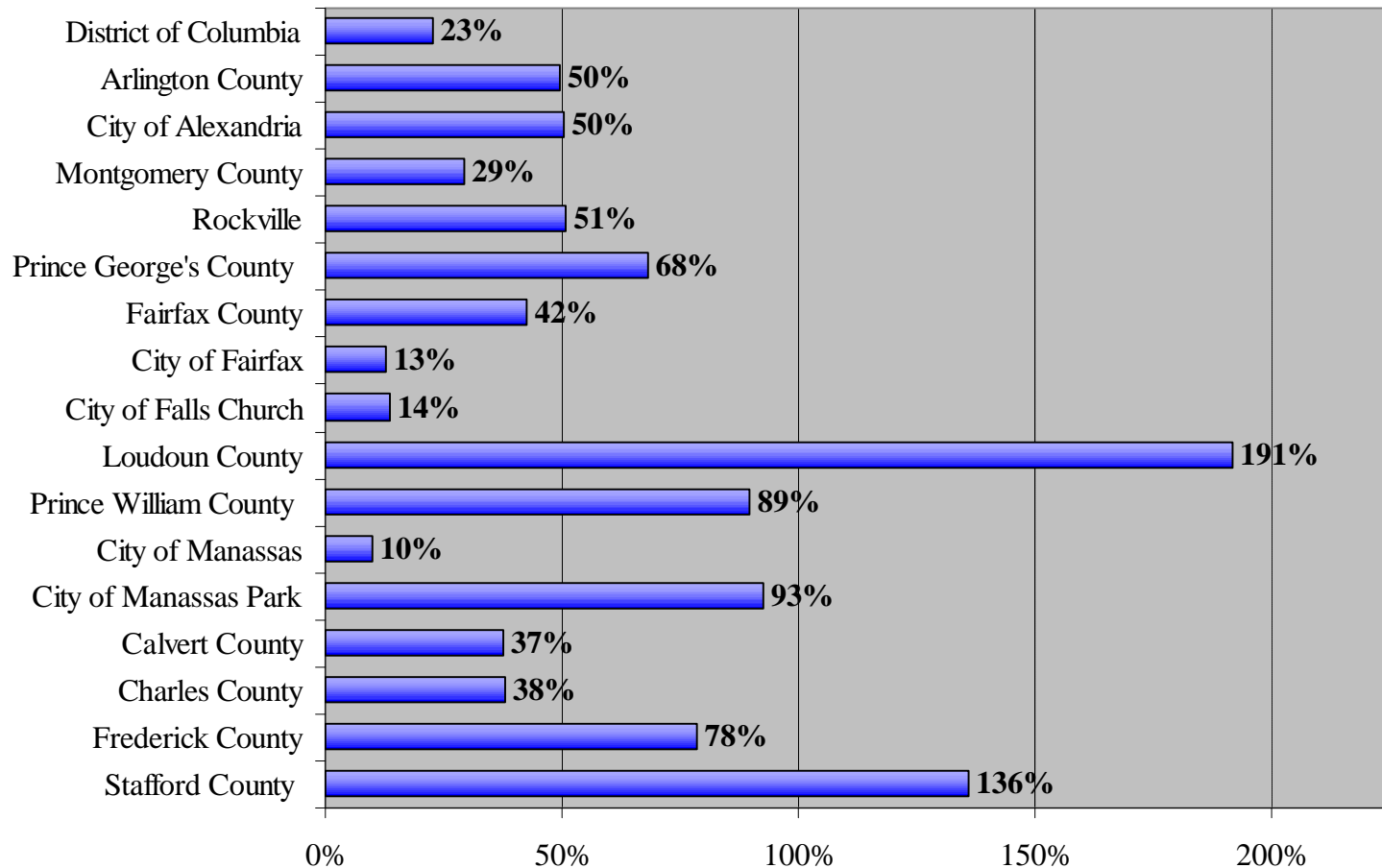
Round 6.3 Employment

**Employment Growth by Jurisdiction
2000 Employment and Forecast 2000 - 2030**

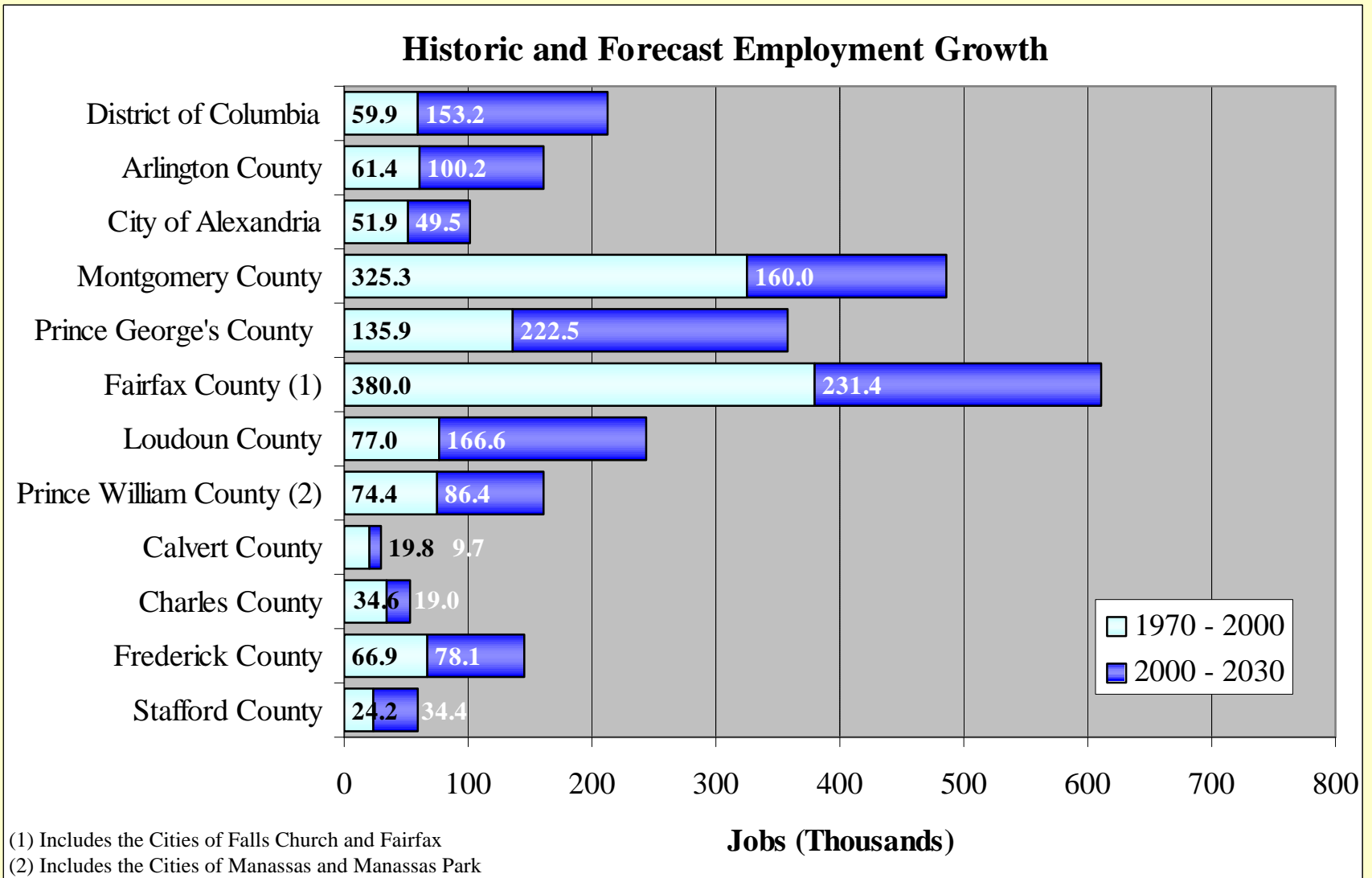


Round 6.3 Employment

**Percent Employment Growth by Jurisdiction
Forecast 2000 - 2030**

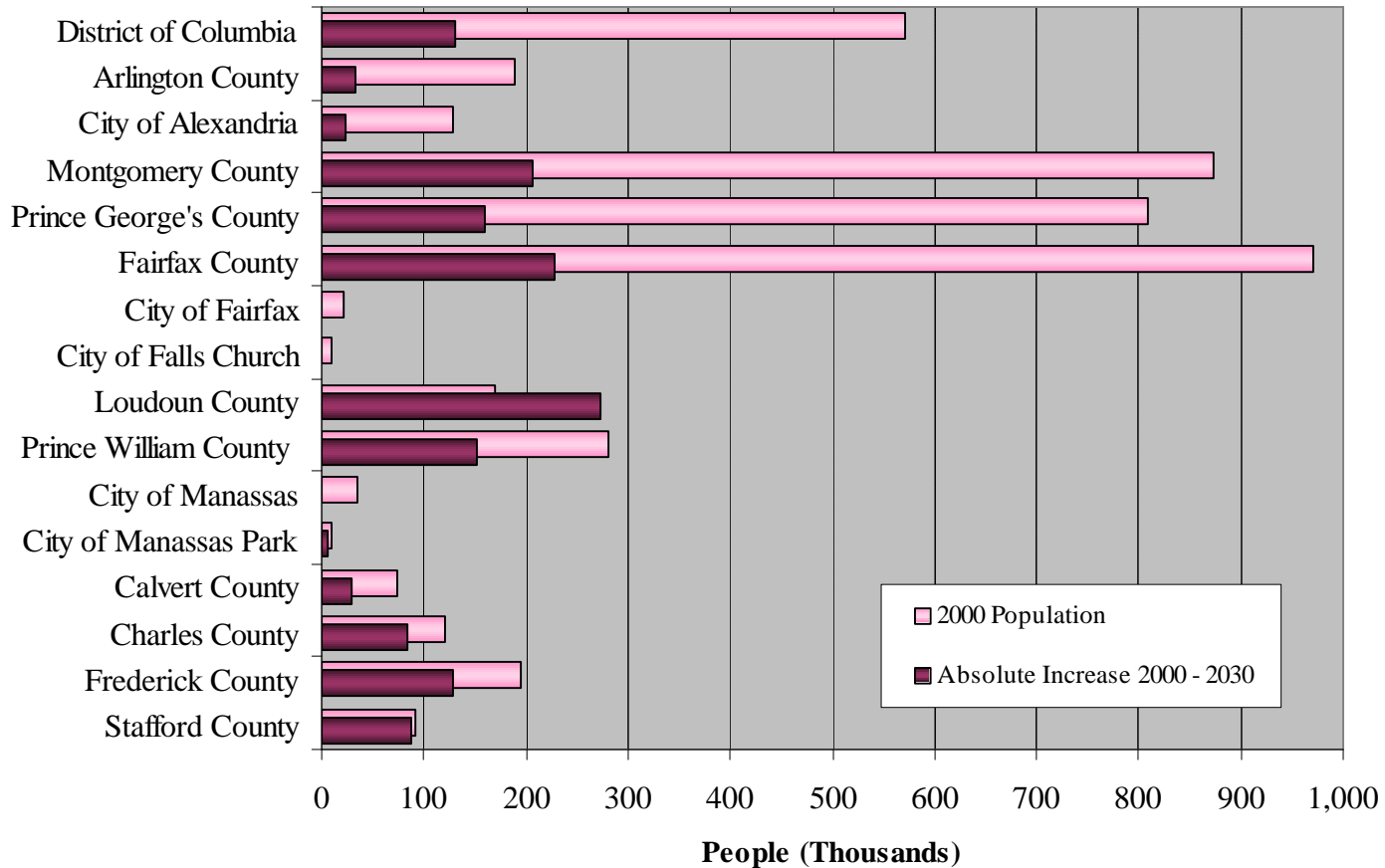


Employment Growth: Historic and Forecast



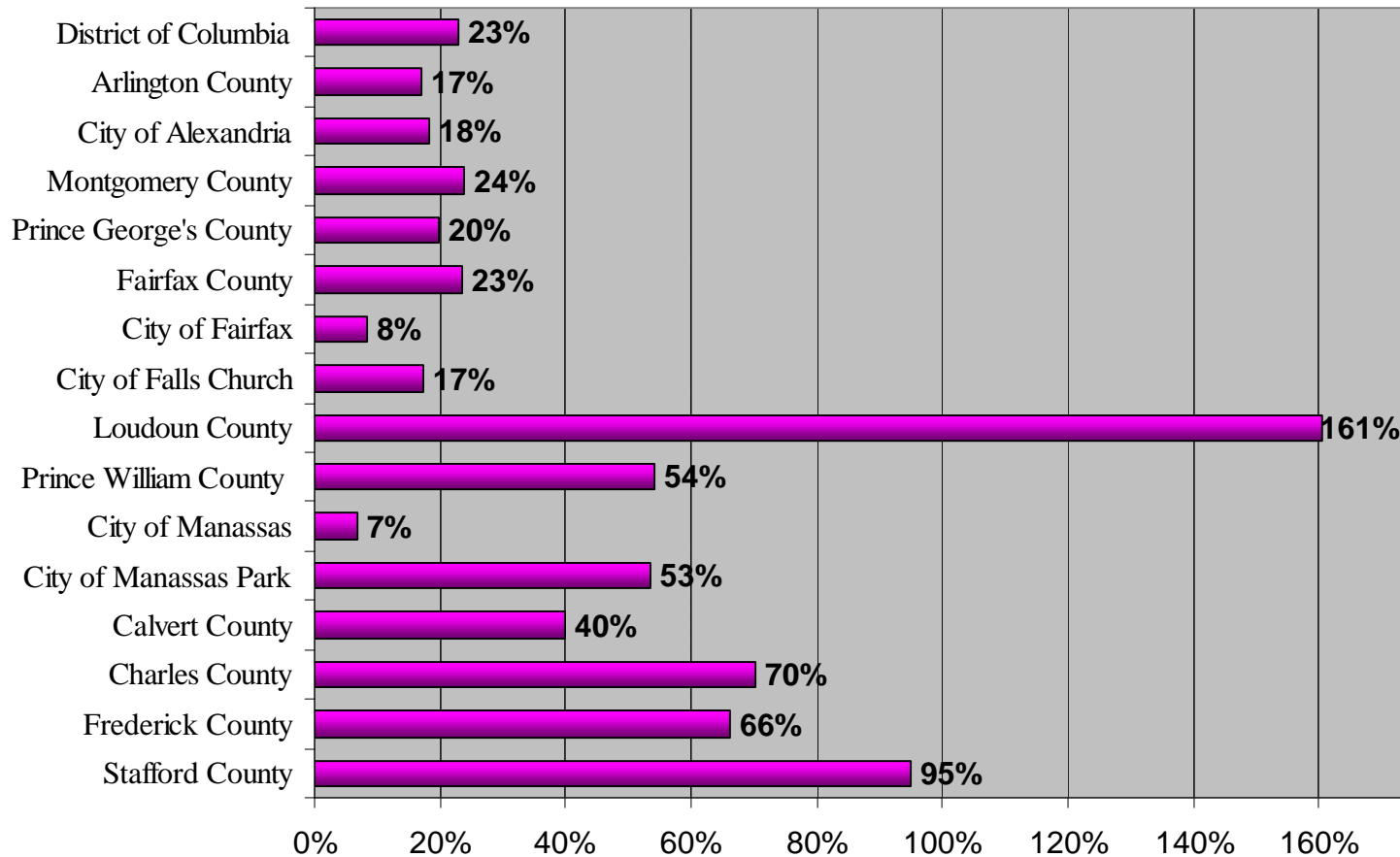
Round 6.3 Population

**Population Growth by Jurisdiction
2000 Population and Forecast 2000 - 2030**

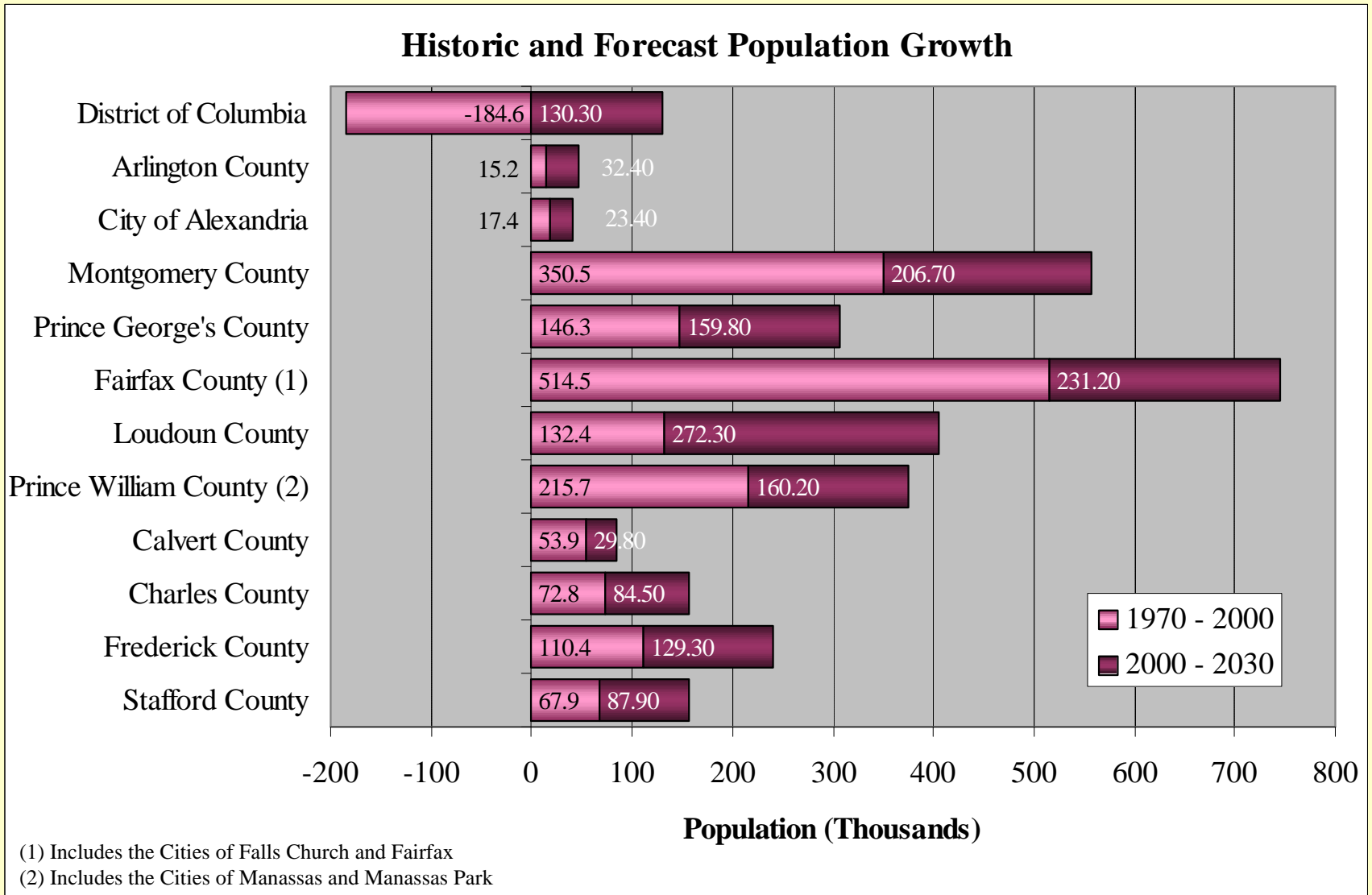


Round 6.3 Population

**Percent Population Growth by Jurisdiction
Forecast 2000 - 2030**

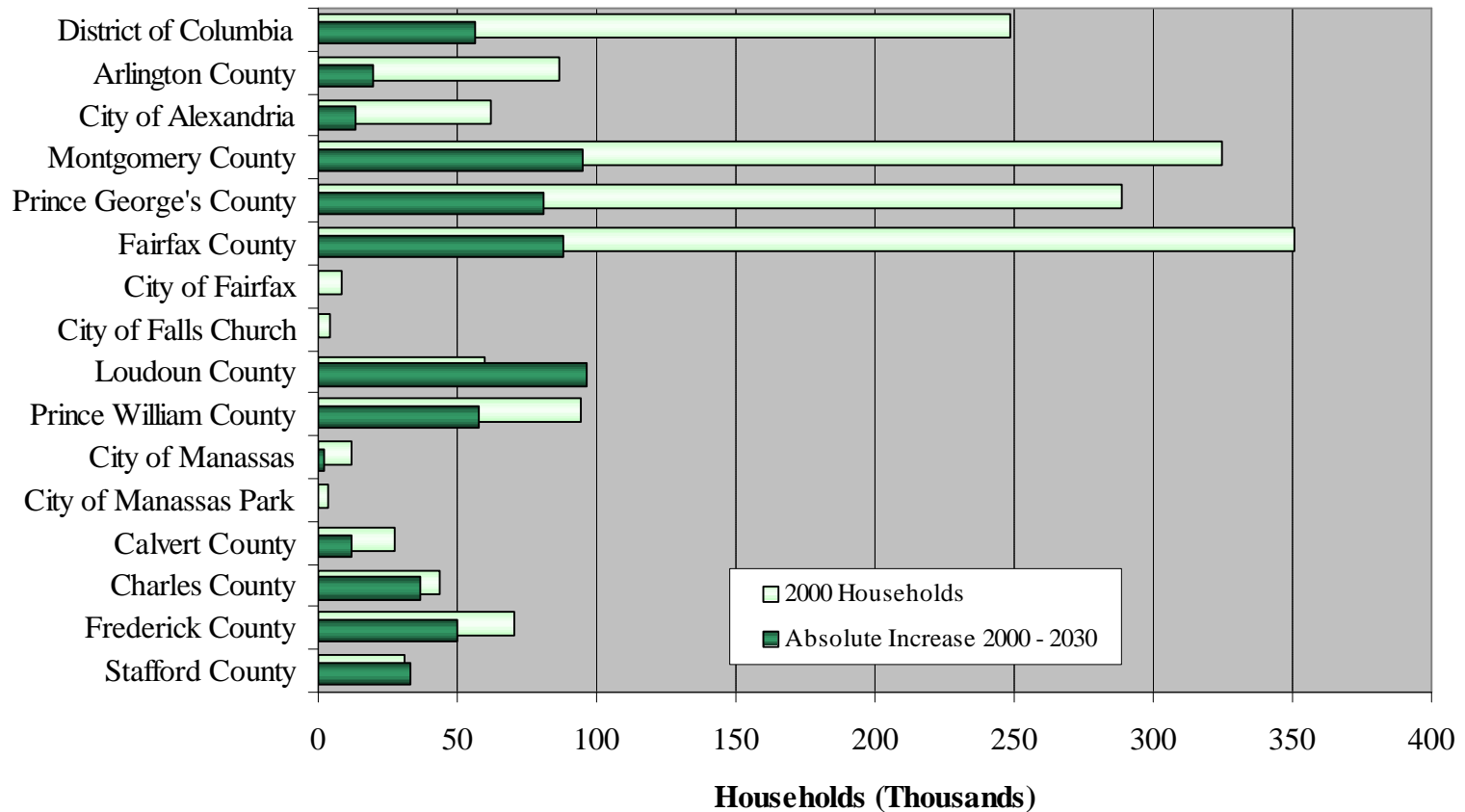


Population Growth: Historic and Forecast



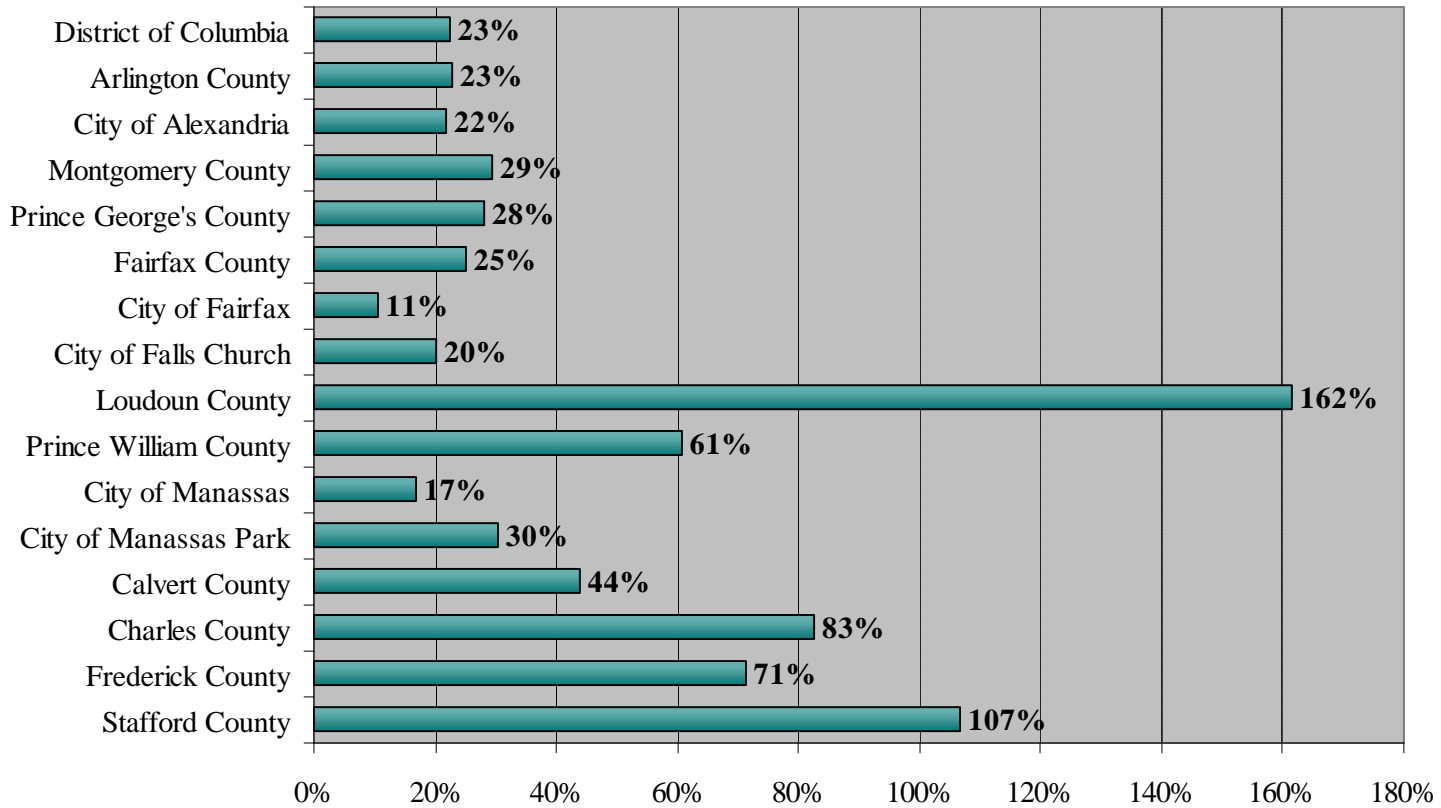
Round 6.3 Households

Household Growth by Jurisdiction 2000 Households and Forecast 2000 - 2030

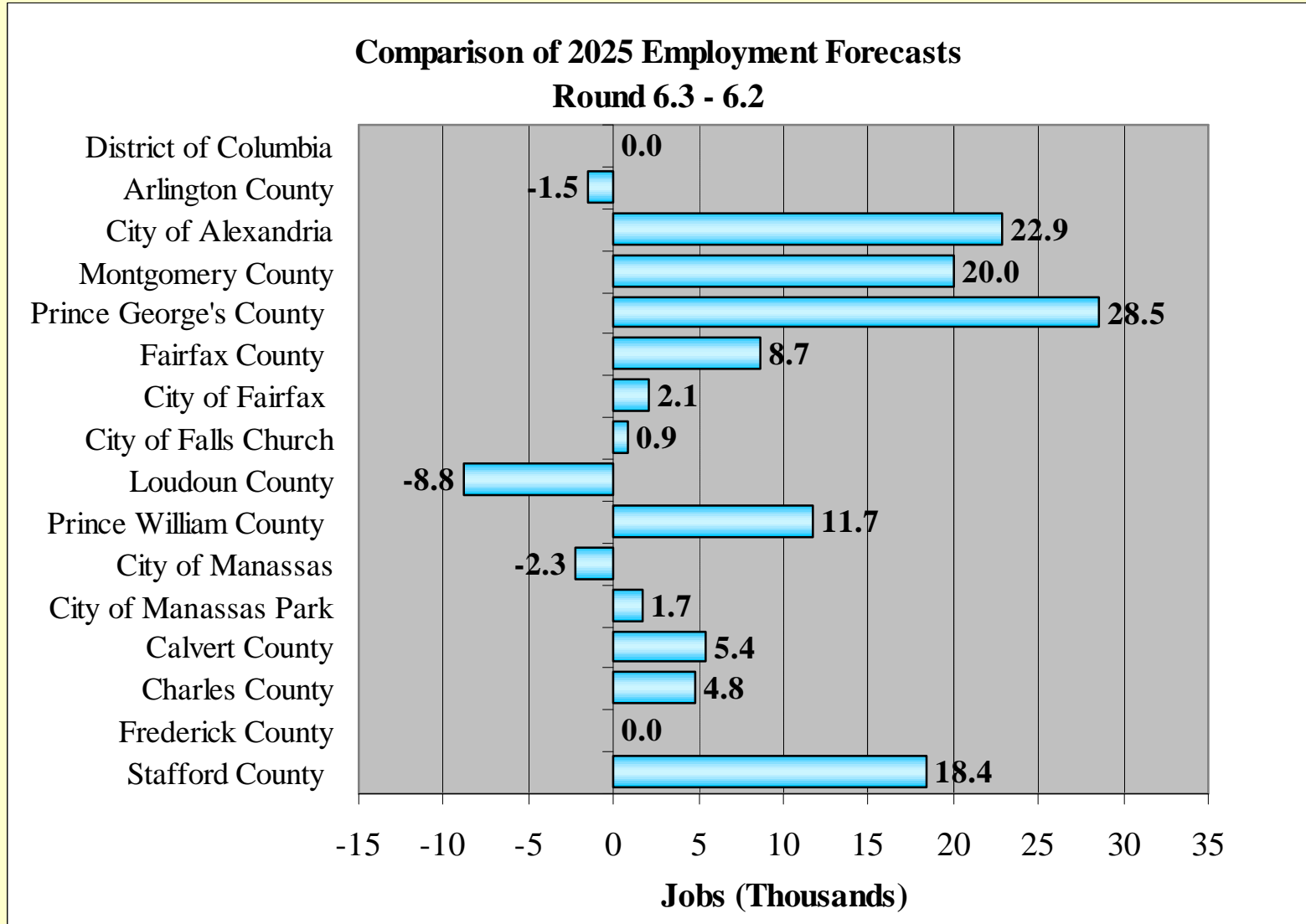


Round 6.3 Households

**Percent Household Growth by Jurisdiction
Forecast 2000 - 2030**

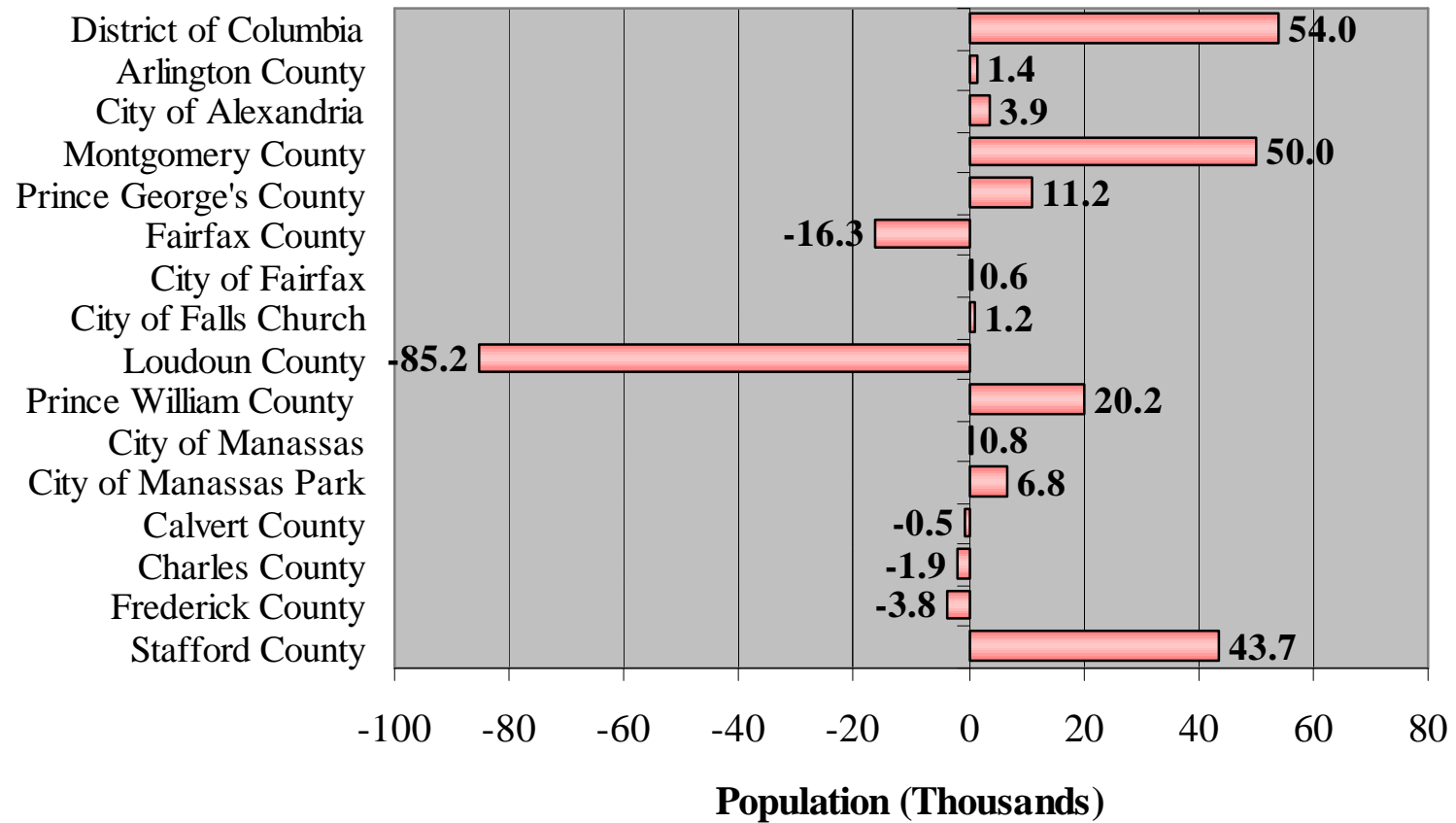


Comparison of Round 6.2 and 6.3 Employment Forecasts

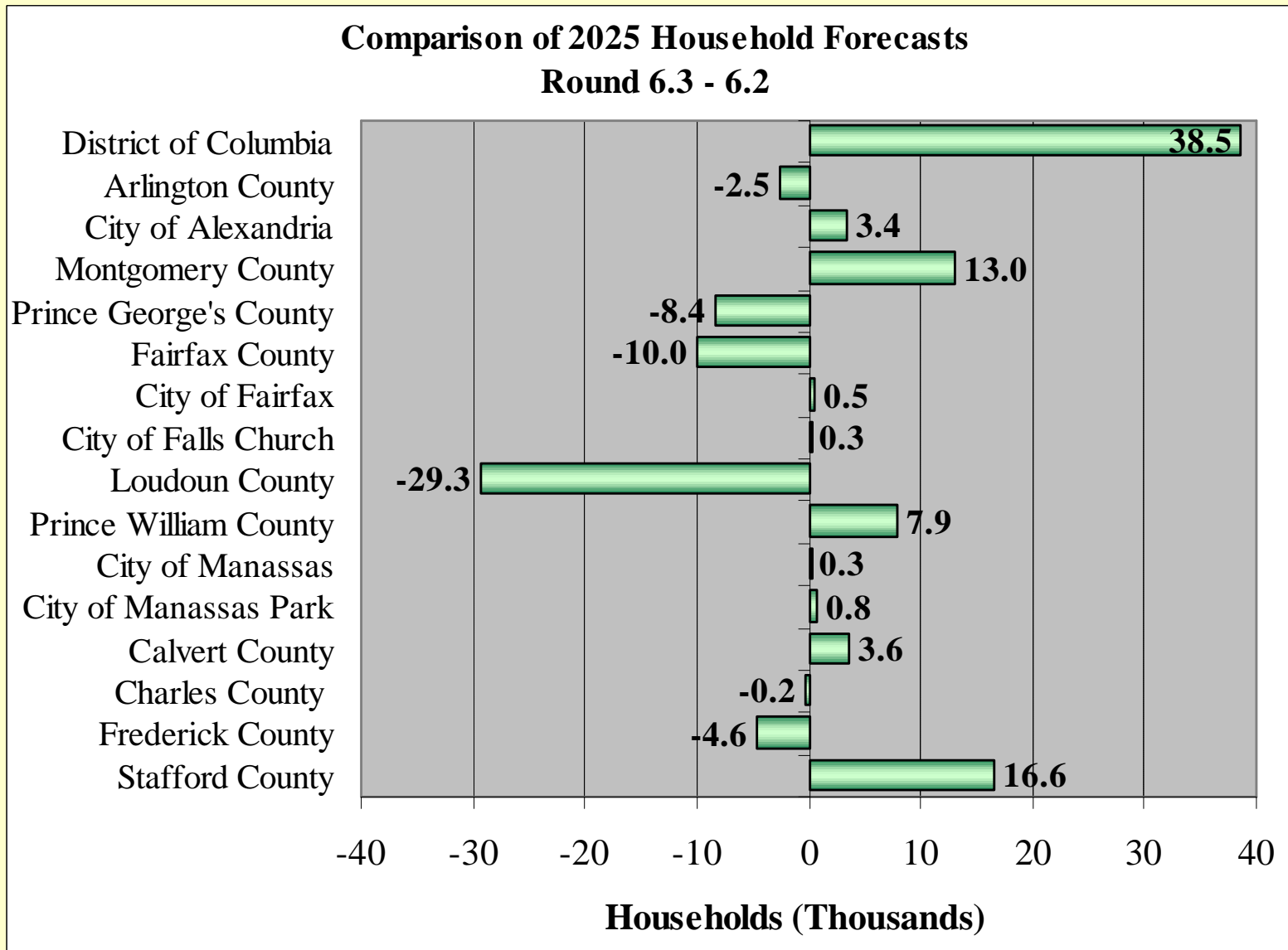


Comparison of Round 6.2 and 6.3 Population Forecasts

**Comparison of 2025 Population Forecasts
Round 6.3 - 6.2**



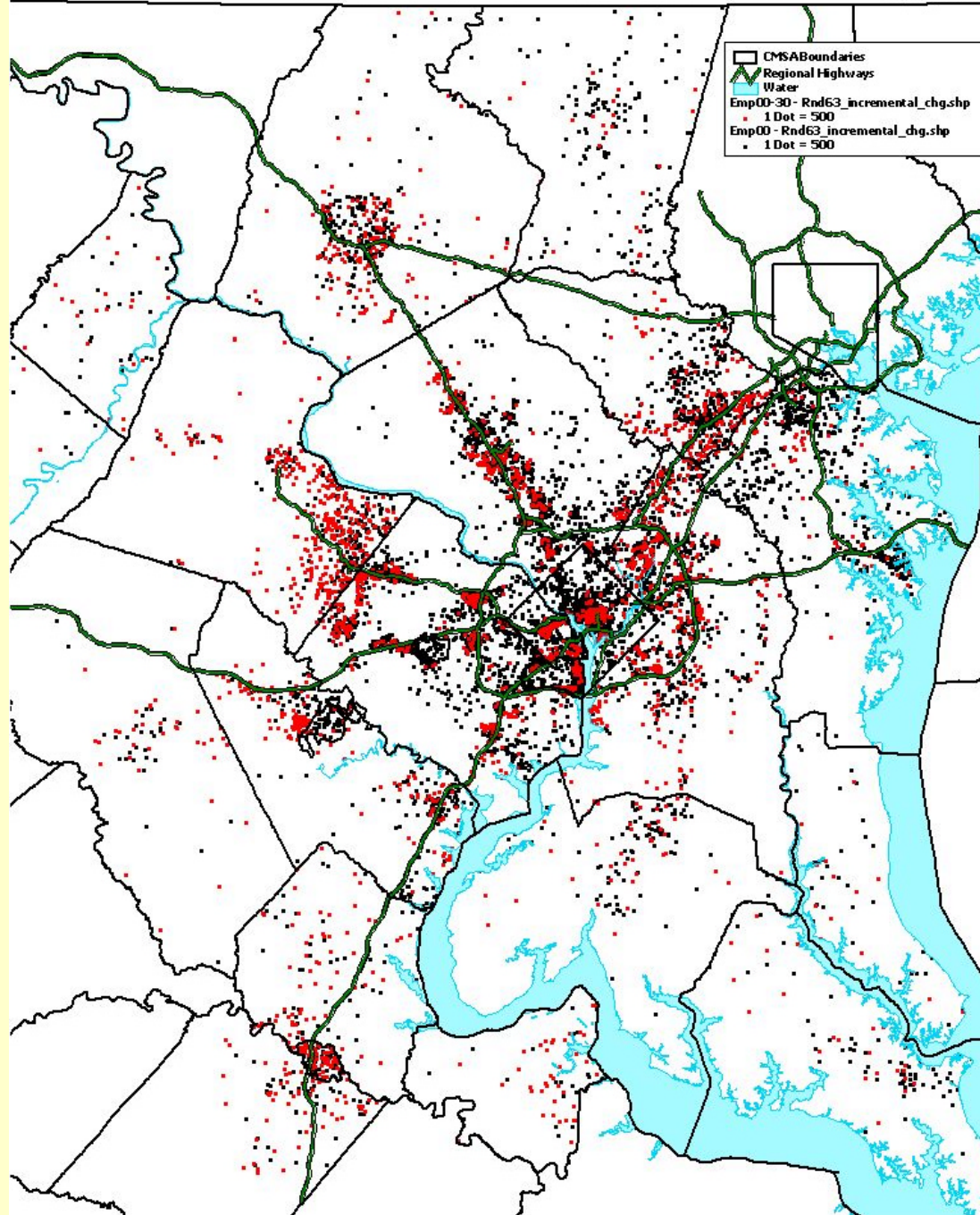
Comparison of Round 6.2 and 6.3 Household Forecasts





Round 6.3 Employment Growth 2000 - 2030

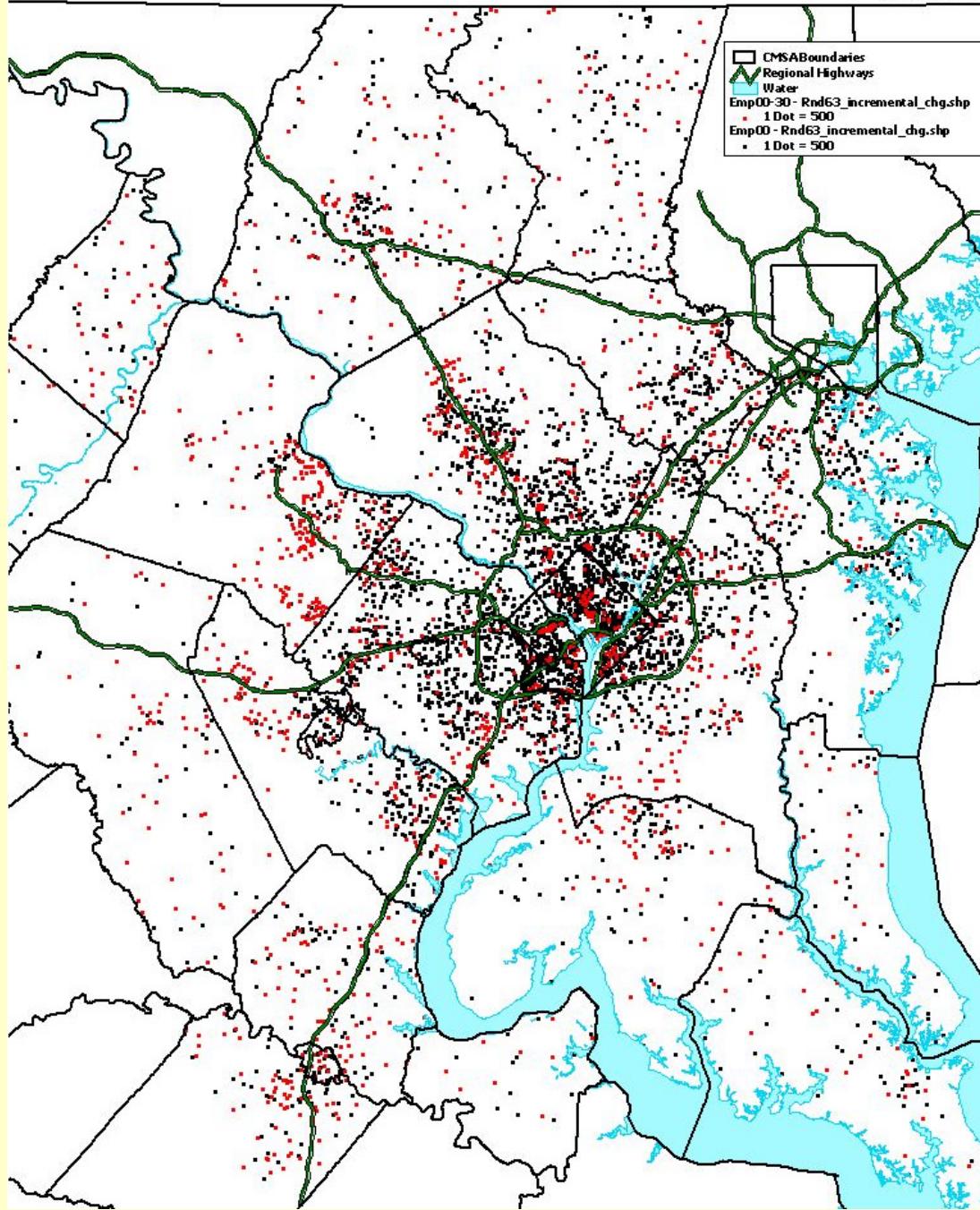
May 9th, 2003



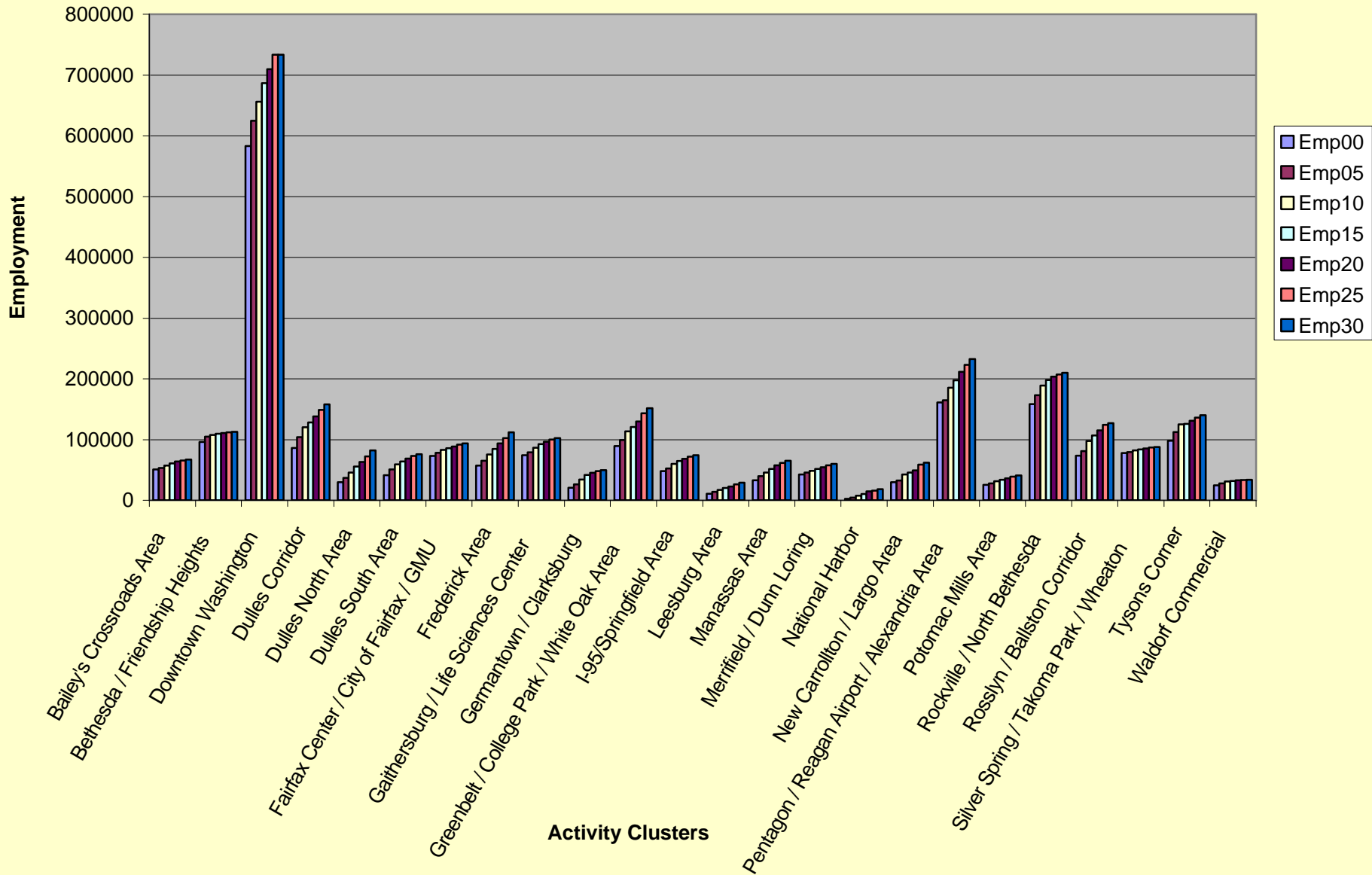


Round 6.3 Household Growth 2000 - 2030

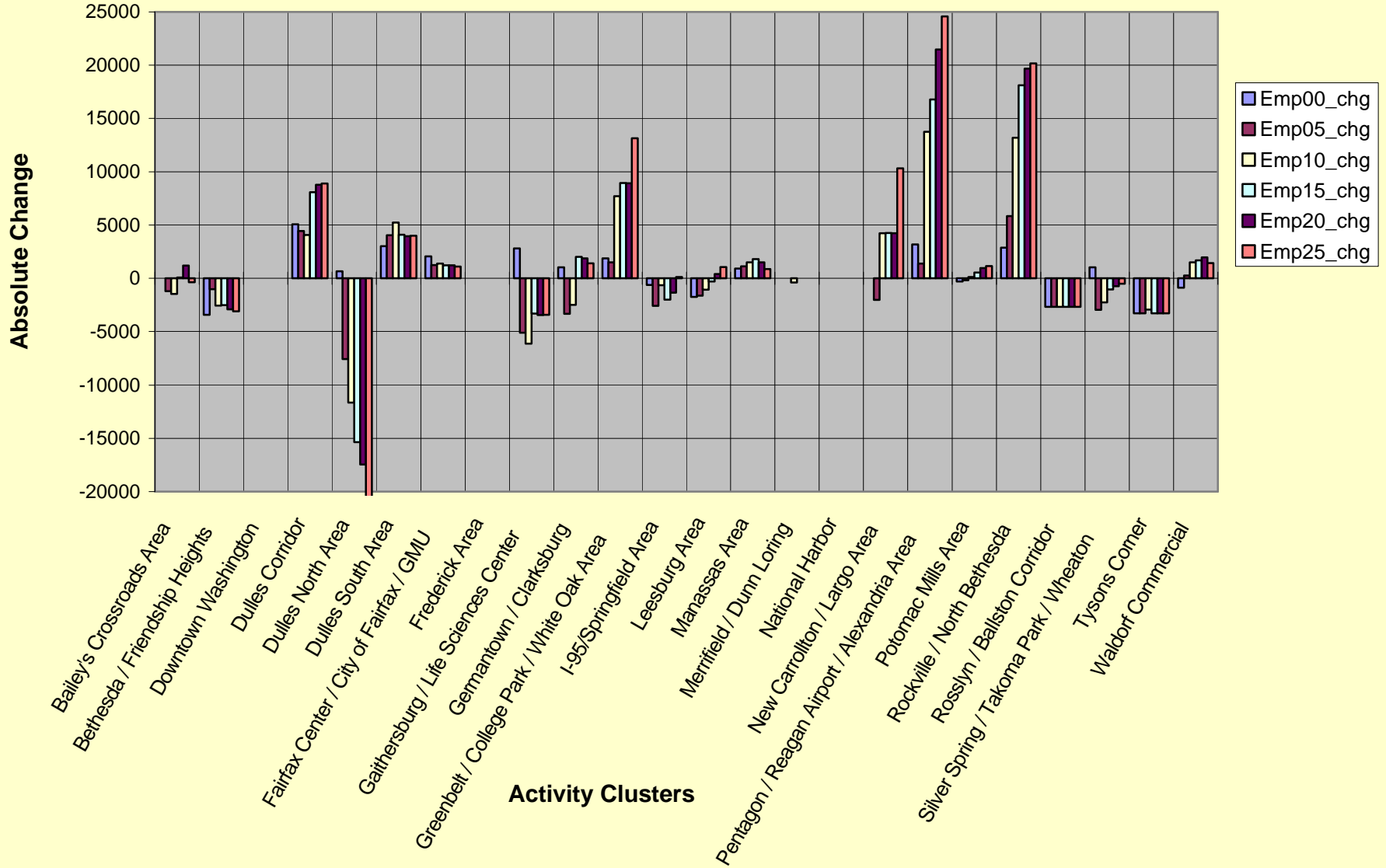
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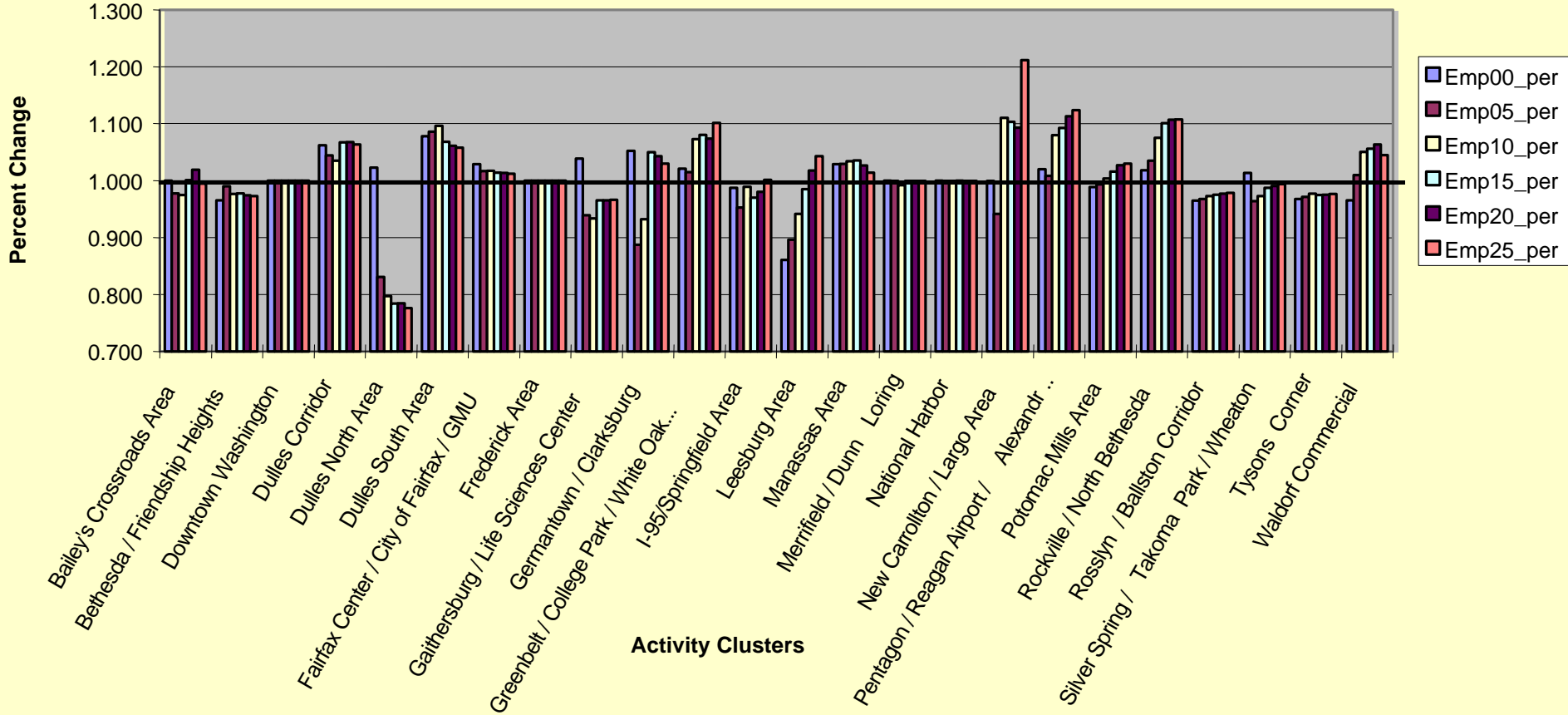
Round 6.3 Employment in Activity Clusters



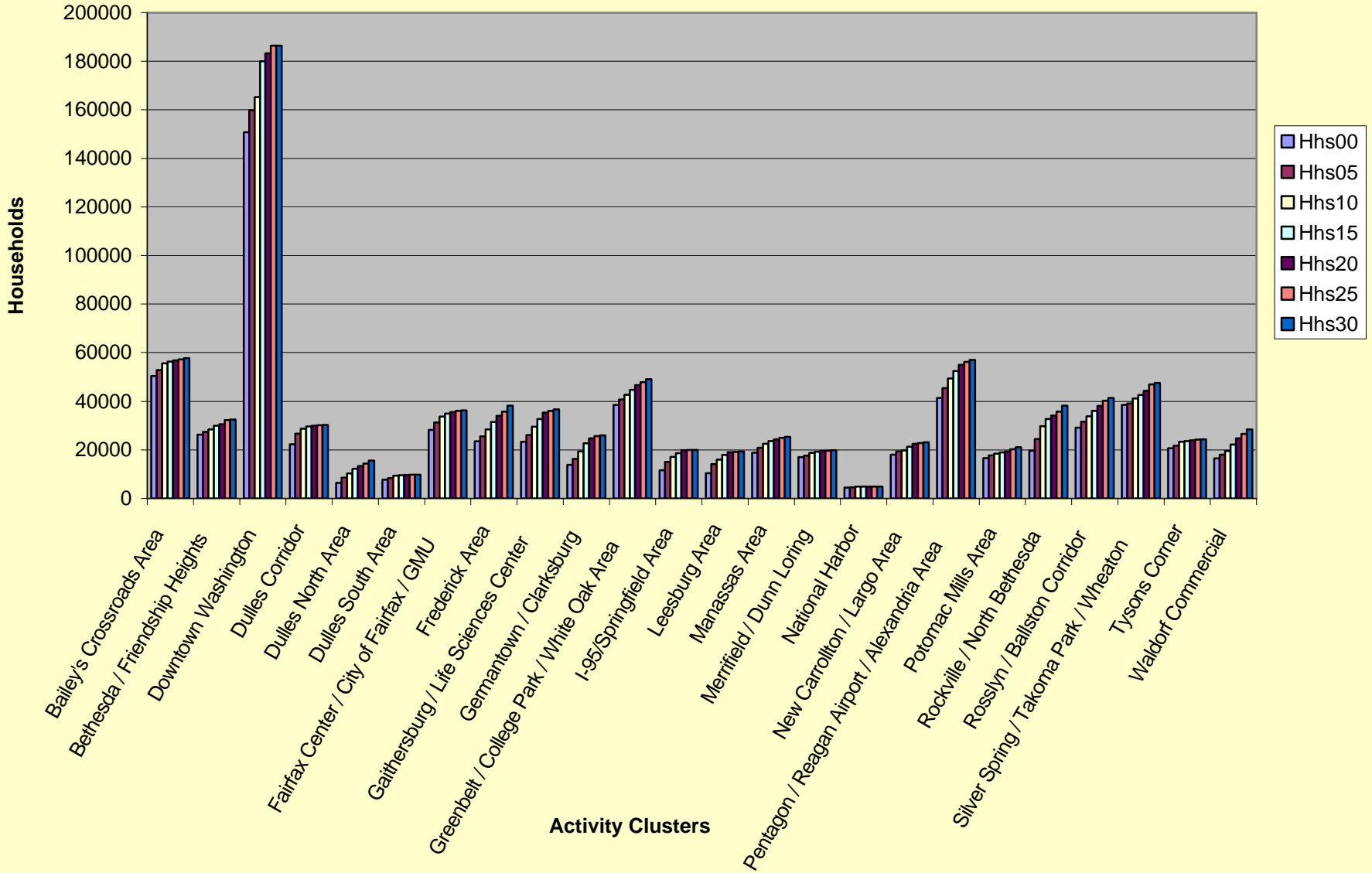
Change in Activity Cluster Employment Forecasts Between Round 6.2 and Round 6.3



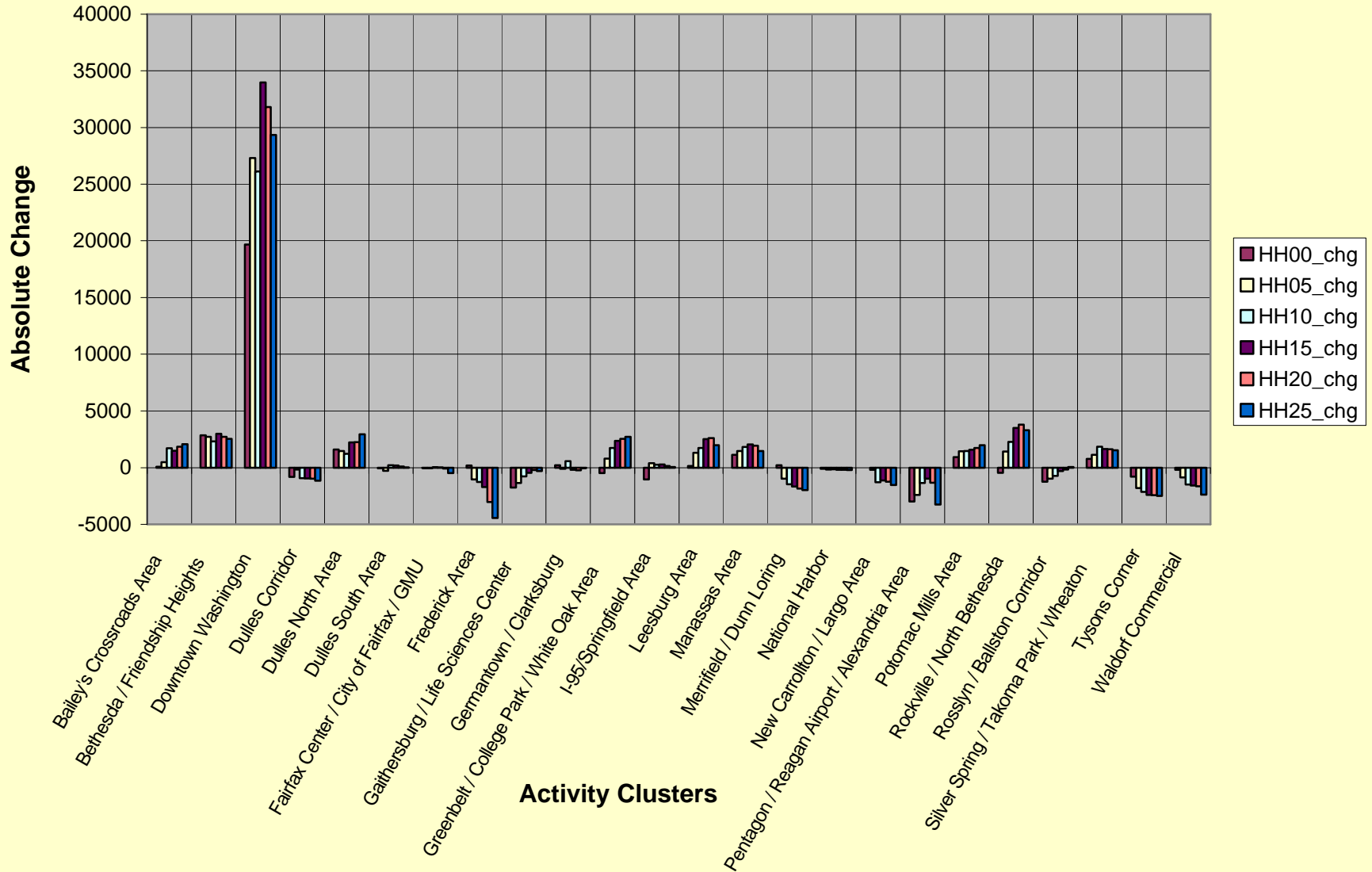
Percent Change in Activity Cluster Employment Forecasts Between Round 6.2 and Round 6.3



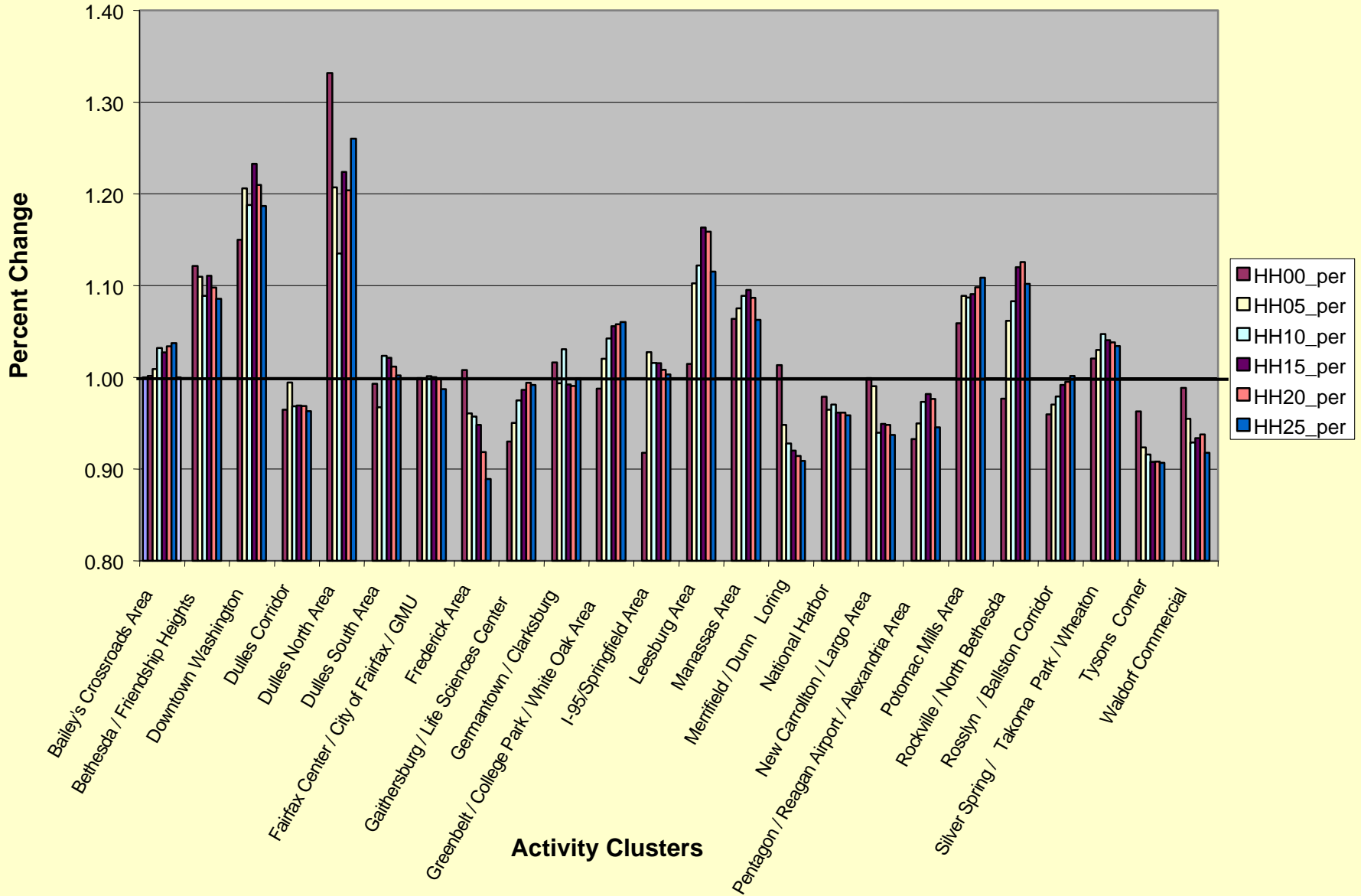
Round 6.3 Households in Activity Clusters



Absolute Change in Activity Cluster Household Forecasts Between Round 6.2 and Round 6.3



Percent Change in Activity Cluster Household Forecasts Between Round 6.2 and Round 6.3



Summary of Findings

1. What are the trends? By region? By jurisdiction?

- Round 6.3 Employment Forecasts are tracking on the “High” Round 6 Scenario.
- Round 6.3 Population and Household Forecasts approach the “High” Scenario in the early years, but flatten out toward 2030.
- **1.3 million new jobs** will be added by 2030-- **47 percent** of the growth will occur in the Inner Jurisdictions and **23 percent** of the growth will be occur in the Central Jurisdictions.
- Fairfax County will have the greatest absolute increase (226,100) in new jobs between 2000 and 2030.
- Loudoun County will have the greatest percentage change (191.5 percent) in new jobs between 2000 and 2030.

Summary of Findings - 2

- The population will increase by **1.5 million** people by 2030-- **50 percent** of the growth will be in the Outer Jurisdictions.
- Loudoun County will have the greatest absolute change (272,300) in population and the greatest percentage change (160.6 percent) between 2000 and 2030.
- **644,000 households** will be added to the regional total by 2030-- **42 percent** of the growth will be in the Inner Jurisdictions and **45 percent** will be in the Outer Jurisdictions.
- Loudoun County will have the greatest absolute change (96,800) in households and the greatest percentage change (161.6 percent) between 2000 and 2030.

Summary of Findings - 3

- 2. Which trends are positive? (“as relates to existing COG policies”)**
- 3. Which trends are negative? (“as relates to existing COG policies”)**
- 4. How do the forecasts link to the Transportation Improvement Program (TIP) and Constrained Long Range Plan (CLRP)?**
- 5. How do the forecasts link to the Regional Activity Centers? What are the share of jobs and households in the Regional Activity Centers?**
 - The Dulles North cluster in Loudoun County will experience a large reduction in employment in the year 2025 as compared to the Round 6.2 forecasts.
 - Prince George’s County is forecasting higher employment totals in the Greenbelt / College Park cluster and the New Carrollton / Largo cluster.
 - Pentagon / Regan Airport / Alexandria, Rockville / North Bethesda cluster and Dulles Corridor cluster are all forecasting higher employment numbers than were submitted in Round 6.2

Summary of Findings - 4

- The Downtown Washington cluster stands out due to the large number of households being forecasted compared with Round 6.2. (One explanation for this is the additional 50,000 people found to be living in the District of Columbia in the 2000 Census.)
 - Frederick, Merrifield / Dunn Loring and Tysons Corner clusters are all forecasting significantly lower household numbers than were provided in Round 6.2.
- 6. How do the forecasts link to the Air Quality Conformity Analysis?**
 - 7. What changes in policy should be considered based on the forecasts?**