

ITEM 11- Information

April 16, 2014

Briefing on the COG Cooperative Forecasting Process

Staff

Recommendation: Receive briefing on how the COG Cooperative Forecasting Process develops population, household and employment forecasts for use in the regional transportation planning process, including key features of the recently developed Round 8.3 forecasts.

Issues: None

Background: The Cooperative Forecasting Process was established in 1975 to enable local, regional, and federal agencies to coordinate planning using common assumptions about future growth and development. Each series of forecasts constitutes a "Round," and each round covers a period of 20 to 30 years.

Round 8.3 Cooperative Forecasts of Future Growth

National Capital Region Transportation Planning Board
April 16, 2014

Paul DesJardin
Director of Community Planning
and Services

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Acting Co-Director, DTP
Director of Technical Services

Use of Round 8.3 Cooperative Forecasts

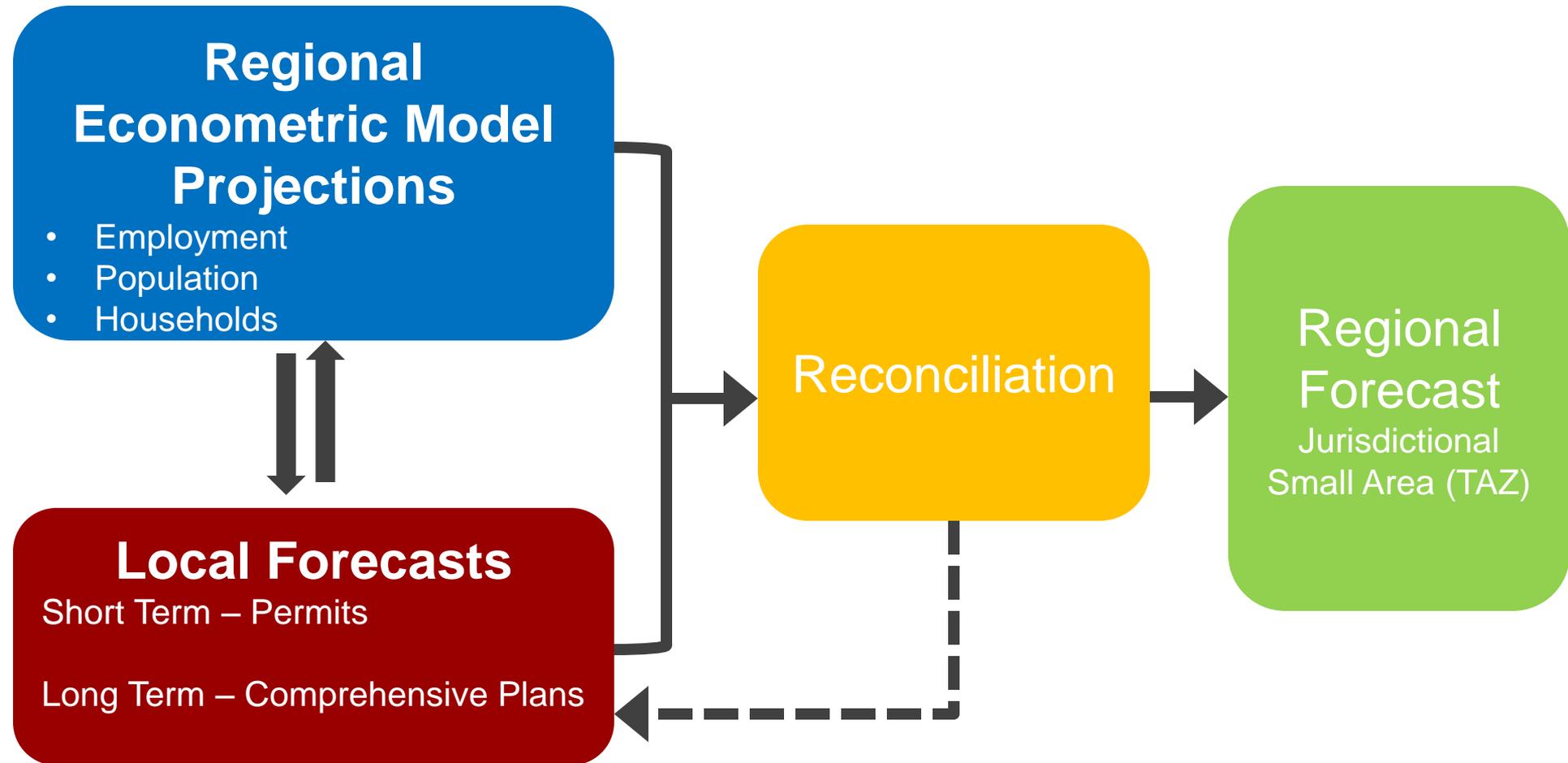
**2014 Air Quality
Conformity Analysis***

**Transportation Planning
Board Analysis**

Activity Center Analysis

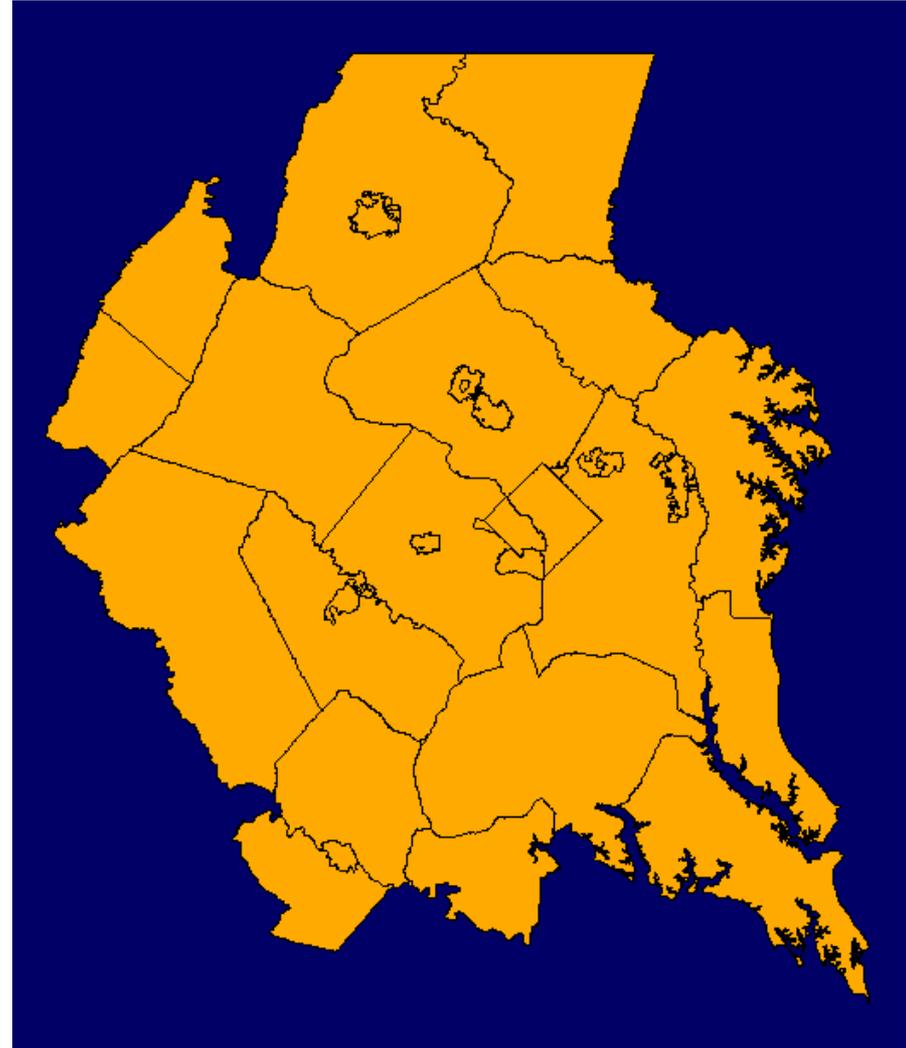
**In March, the COG Board approved the Draft Round 8.3 Cooperative Forecasts for use by the TPB in the Air Quality Conformity Analysis of the 2014 Financially Constrained Long-Range Plan and the FY 2015 to 2020 Transportation Improvement Program*

Cooperative Forecasting Process



Growth Forecasts for All Jurisdictions in the TPB Modeled Area are included in Round 8.3

- **COG Member Jurisdictions**
- **BMC Counties in TPB Modeled Area**
 - Anne Arundel, Carroll & Howard Counties in MD
- **FAMPO**
 - Fredericksburg, King George, Spotsylvania & Stafford Counties in VA
- **Others**
 - Calvert & St. Mary's Counties in MD
 - Clarke & Fauquier Counties in VA
 - Jefferson County in WV



4 Major Updates from Round 8.2:

1. The District of Columbia and Loudoun County updated household, population, & employment forecasts
2. Fairfax County updated its employment forecast
3. The city of Frederick has Cooperative Forecast totals for the first time
4. New data for Anne Arundel, Carroll, and Howard Counties from the Baltimore Metropolitan Council

Summary of Round 8.3 Cooperative Forecasts

Round 8.3 Forecast Summary TPB Modeled Area

(Thousands)

	<u>2010</u>	<u>2040</u>	2010 to 2040	
			<u>Number</u>	<u>Percent</u>
Employment	3,920	5,573	1,652	42.2%
Population	6,641	8,777	2,137	32.2%
Households	2,465	3,373	908	36.8%

Change from Round 8.2 Forecasts

TPB Modeled Area

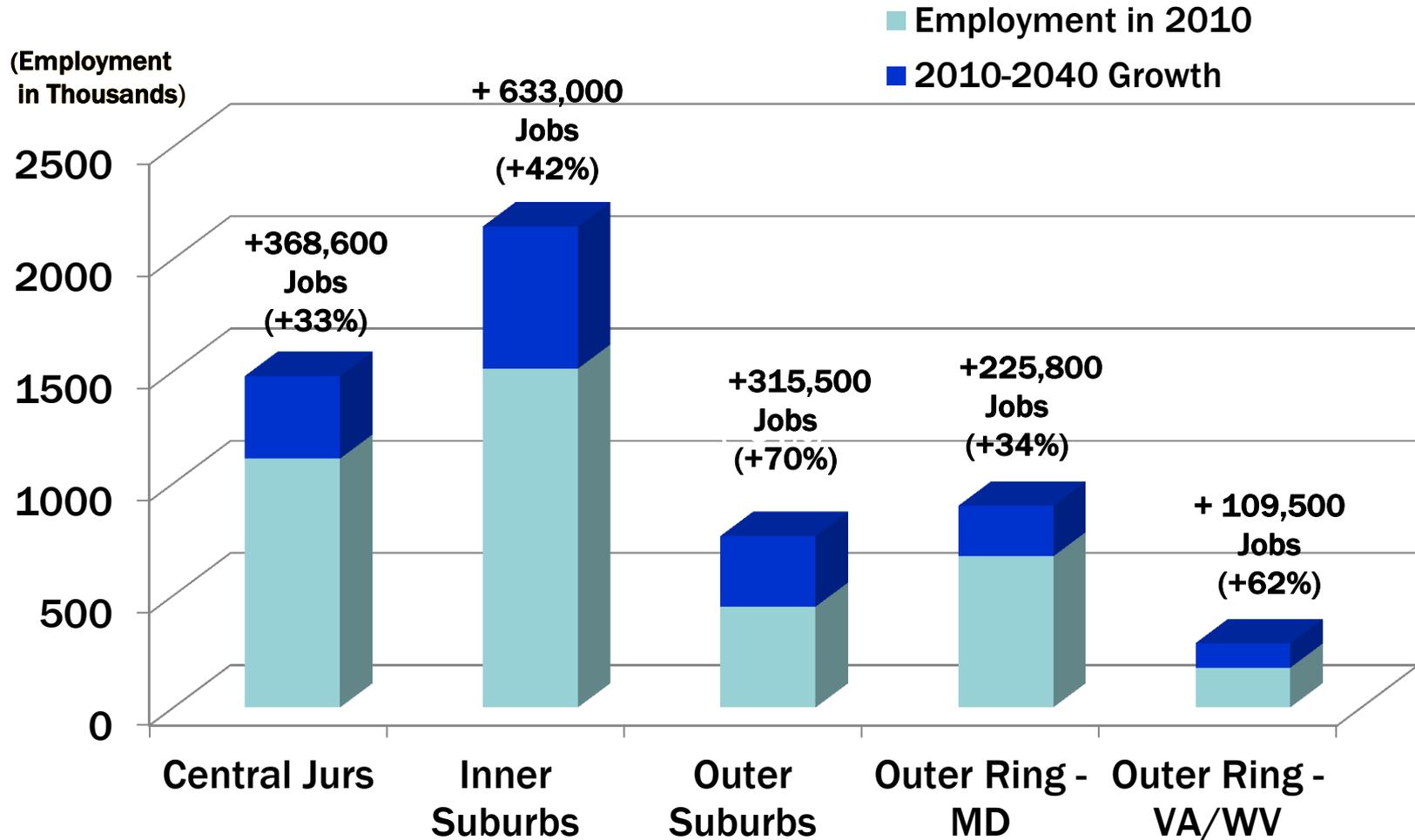
(Thousands)

	Round 8.2 2040	Round 8.3 2040	Number	Percent
Employment	5,502	5,573	71	1.3%
Population	8,653	8,777	124	1.4%
Households	3,338	3,373	35	1.0%

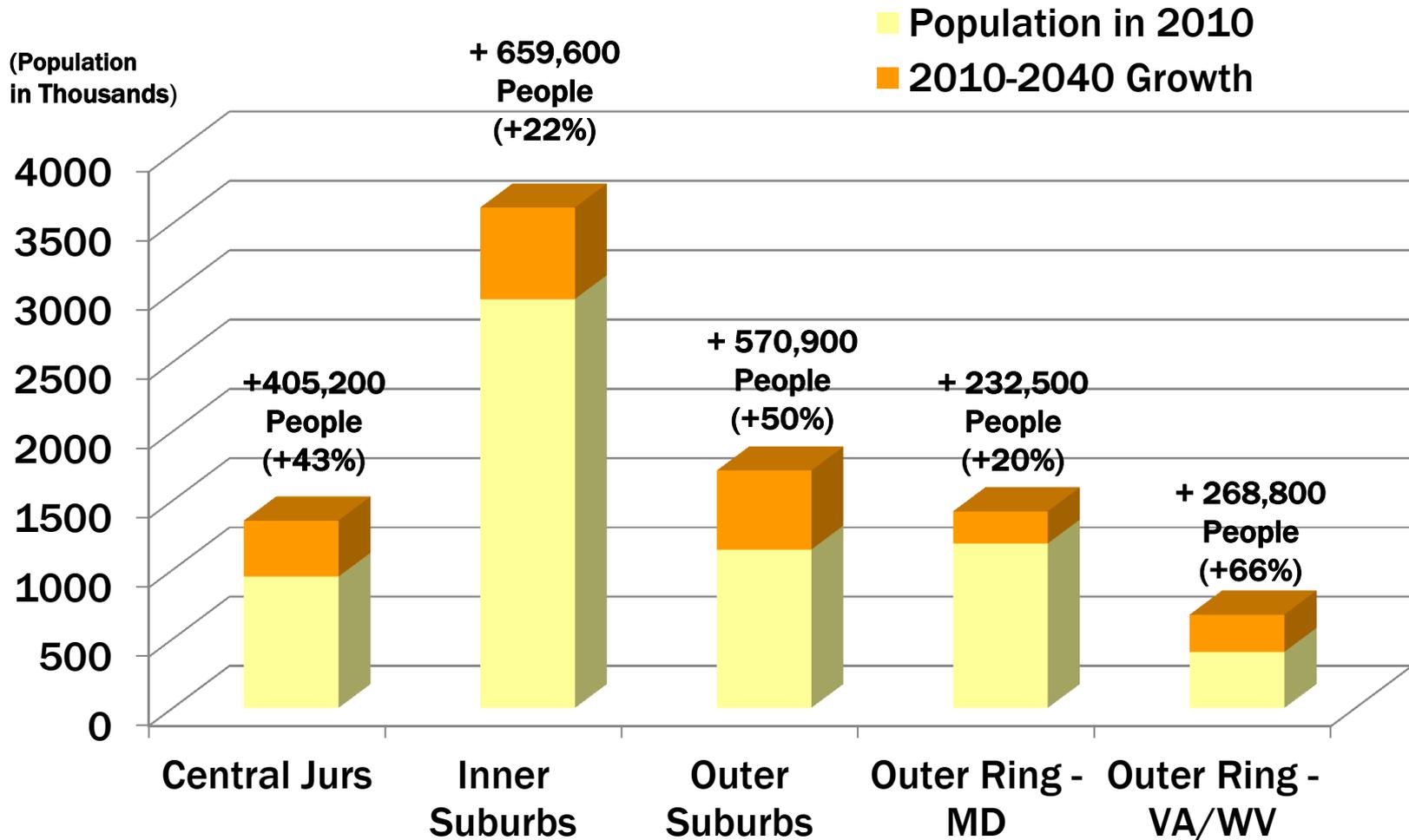
Forecasts for Jurisdictions in TPB Modeled Area Have Been Grouped Geographically for Analysis Purposes

Central Jurisdictions	Inner Suburbs	Outer Suburbs	Outer Ring - MD	Outer Ring - VA/WV
<ul style="list-style-type: none"> • District of Columbia • Arlington • Alexandria 	<ul style="list-style-type: none"> • Montgomery • Prince George's • Fairfax (County) • Fairfax (city) • Falls Church 	<ul style="list-style-type: none"> • Loudoun • Prince William • Manassas • Manassas Park • Charles • Frederick County (MD) 	<ul style="list-style-type: none"> • Anne Arundel • Calvert • Carroll • Howard • St. Mary's 	<ul style="list-style-type: none"> • Fredericksburg • King George • Spotsylvania (portion) • Stafford • Clarke • Fauquier • Jefferson (WV)

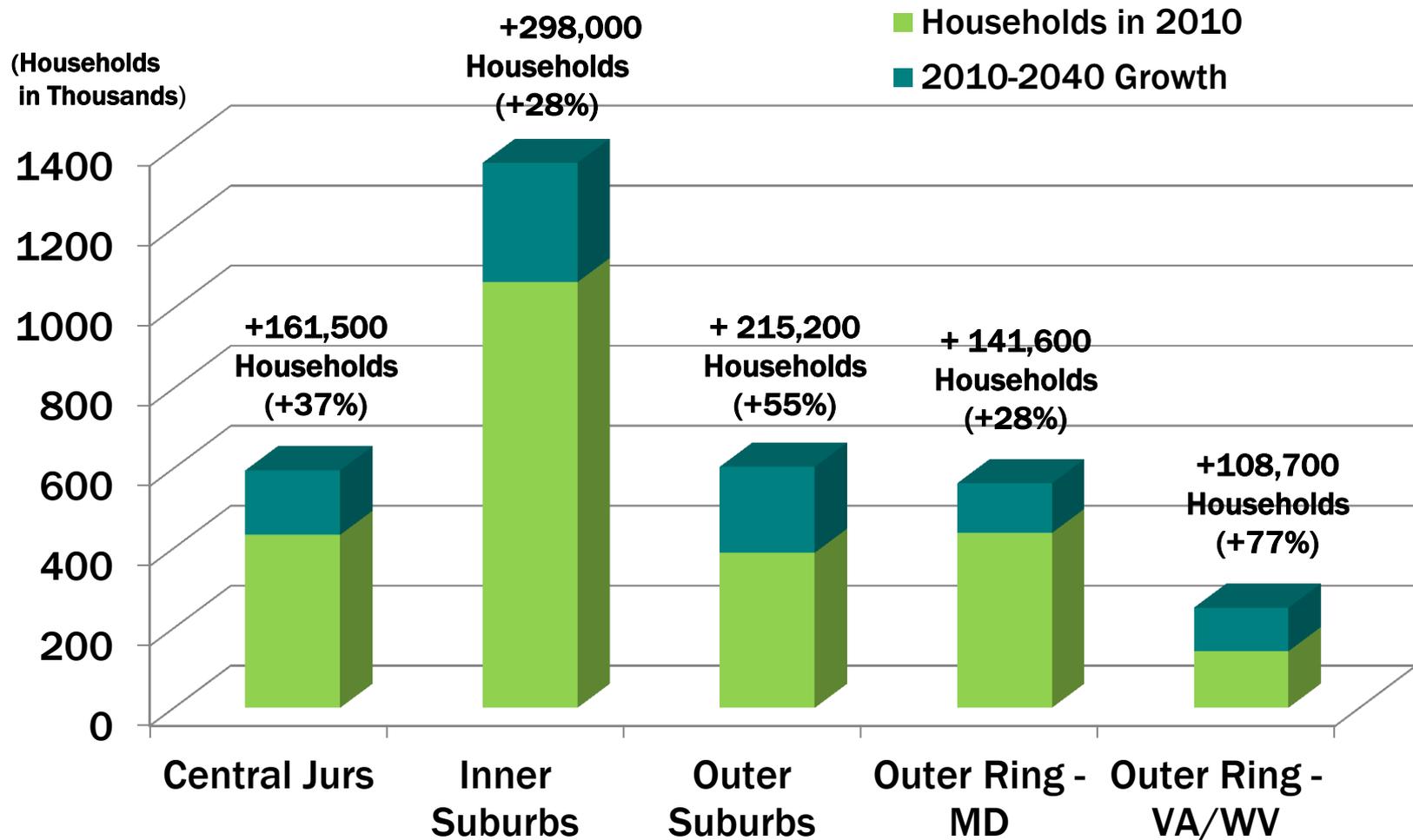
Forecast Employment Growth (2010-2040)



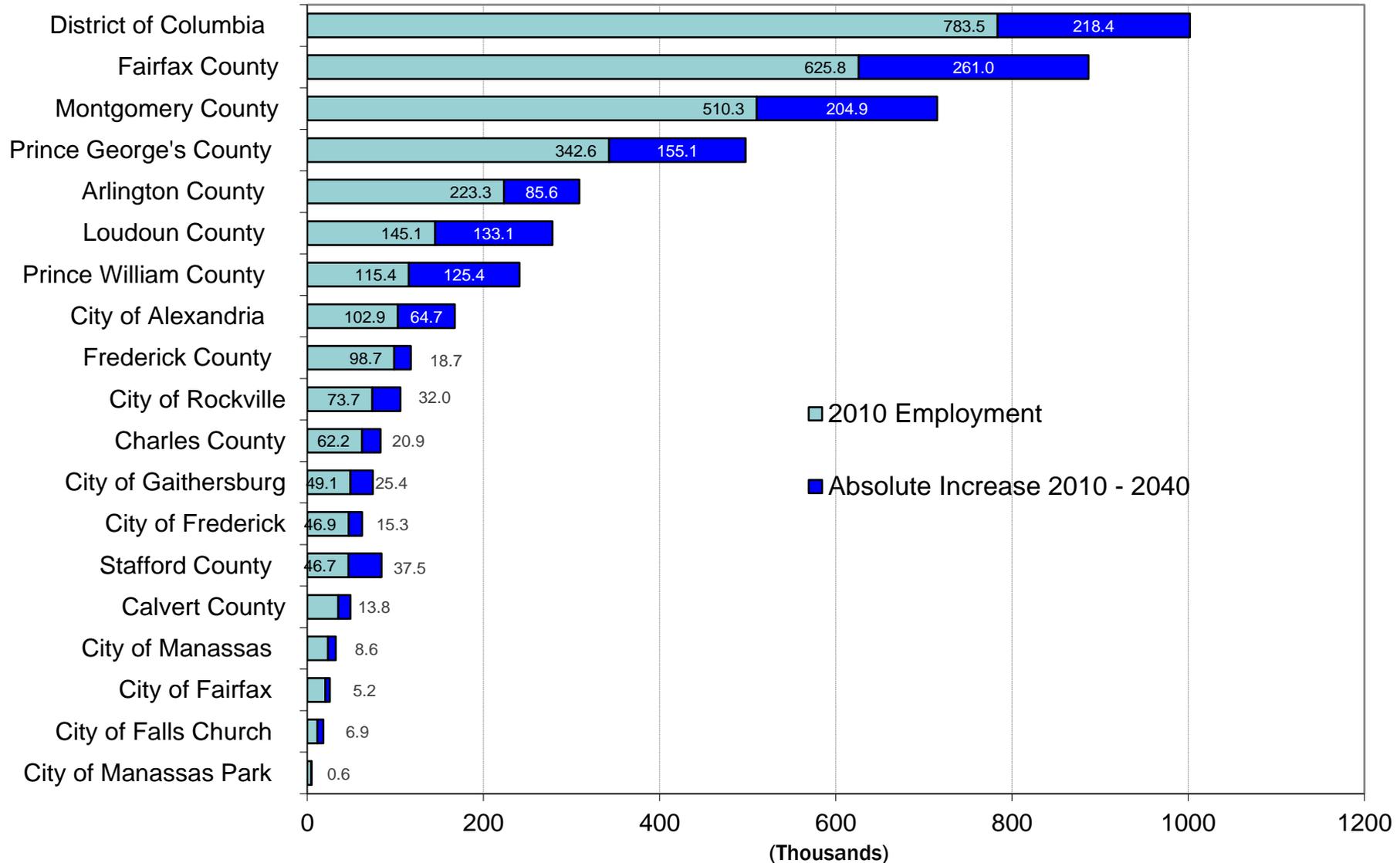
Forecast Population Growth (2010-2040)



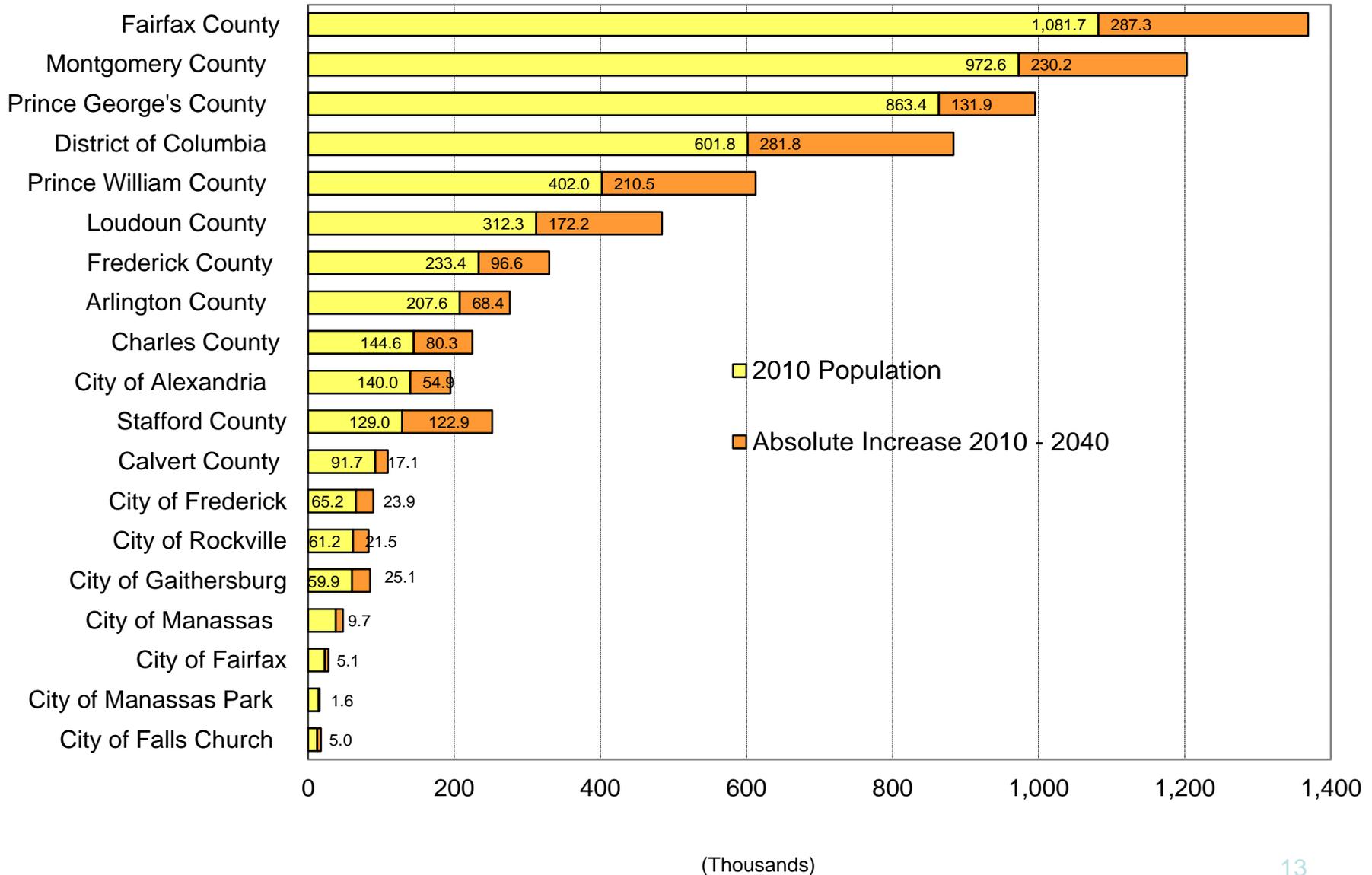
Forecast Household Growth (2010-2040)



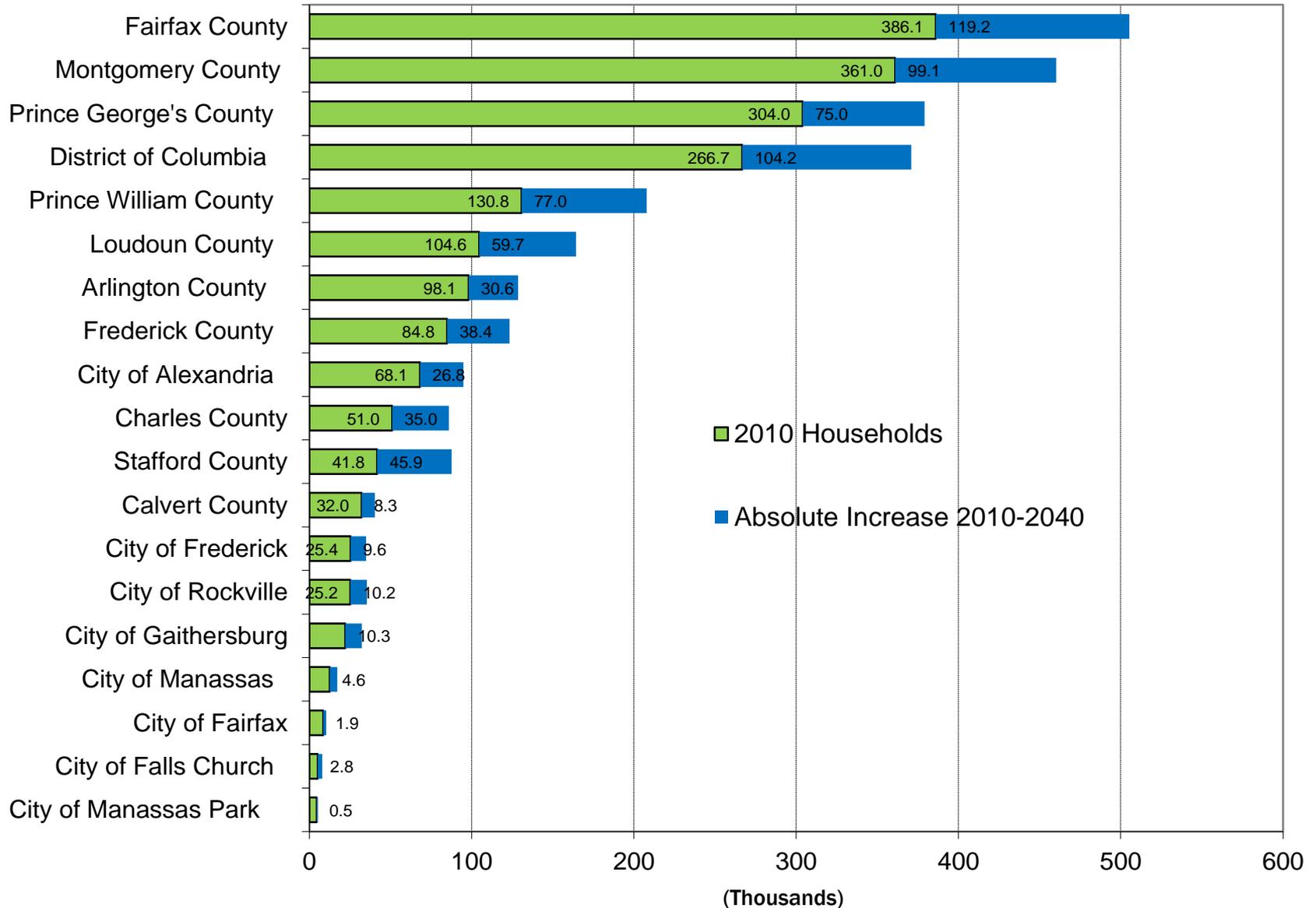
Employment 2010 - 2040



Population 2010 - 2040

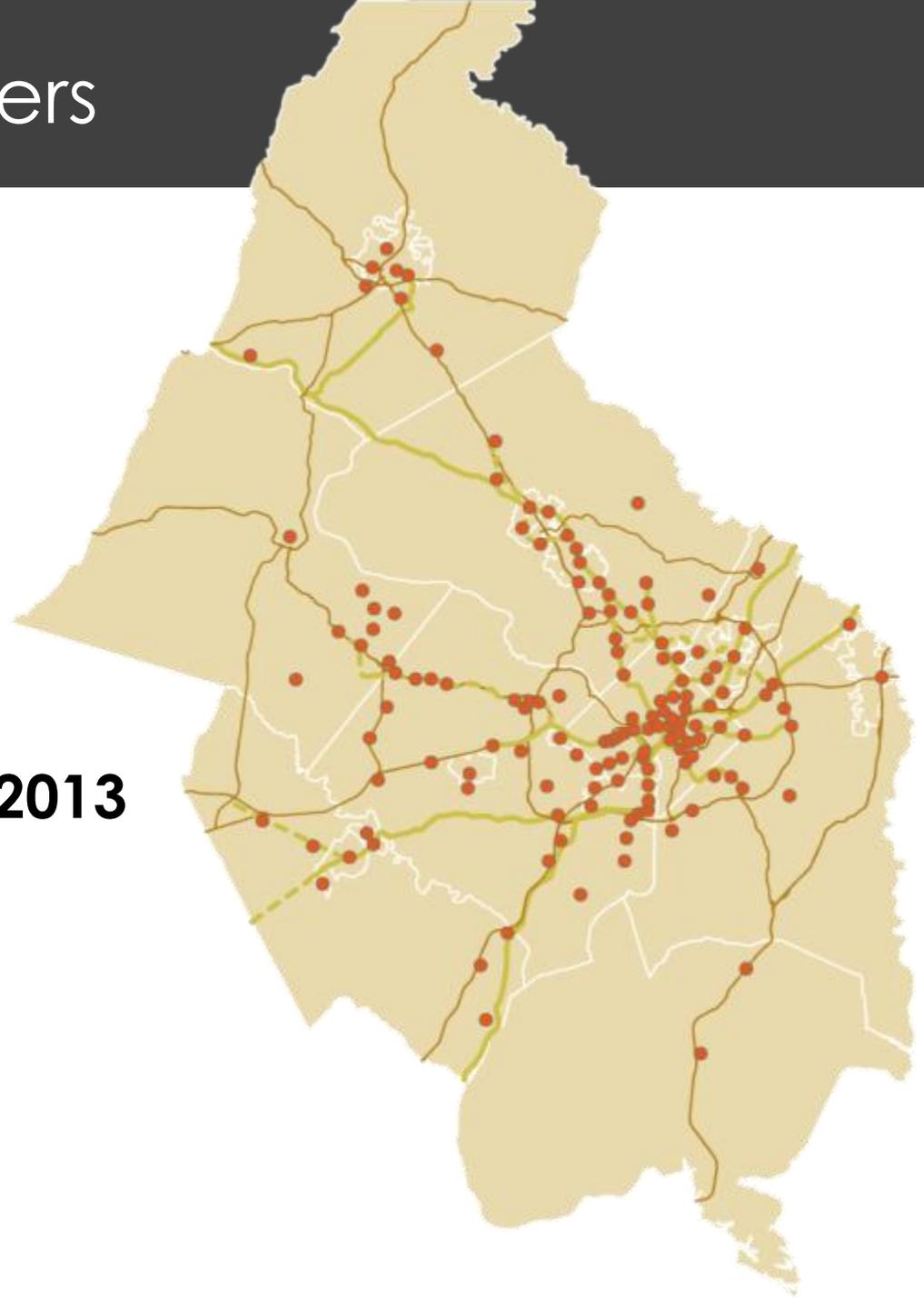


Households 2010 - 2040



Activity Centers

**141 Activity Centers
Approved in January 2013**



Round 8.3 Growth Forecasts

Within and Outside of Activity Centers

EMPLOYMENT

	<u>2010</u>	<u>2040</u>	<u>2010 to 2040</u>	
Within Activity Centers	2,019,000	3,023,000	1,004,000	76.2%
Outside Activity Centers	1,050,000	1,364,000	314,000	23.8%
TOTAL	3,070,000	4,387,000	1,317,000	100.0%

POPULATION

	<u>2010</u>	<u>2040</u>	<u>2010 to 2040</u>	
Within Activity Centers	1,377,000	2,278,000	901,000	55.1%
Outside Activity Centers	3,669,000	4,404,000	735,000	44.9%
TOTAL	5,047,000	6,682,000	1,636,000	100.0%

HOUSEHOLDS

	<u>2010</u>	<u>2040</u>	<u>2010 to 2040</u>	
Within Activity Centers	578,000	984,000	406,000	60.1%
Outside Activity Centers	1,307,000	1,576,000	269,000	39.9%
TOTAL	1,886,000	2,560,000	675,000	100.0%

Change in 2010 to 2040 Growth Forecasts Inside and Outside of Activity Centers Round 8.3 Compared to Round 8.0

GROWTH WITHIN ACTIVITY CENTERS

	Round 8.0 Growth <u>2010-2040</u>	Round 8.3 Growth <u>2010-2040</u>	Change Round 8.0 <u>to Round 8.3</u>
Employment	923,000	1,004,000	81,000
Households	348,000	406,000	58,000
Population	732,000	901,000	169,000

GROWTH OUTSIDE ACTIVITY CENTERS

	Round 8.0 Growth <u>2010-2040</u>	Round 8.3 Growth <u>2010-2040</u>	Change Round 8.0 <u>to Round 8.3</u>
Employment	298,000	313,000	15,000
Households	262,000	269,000	7,000
Population	644,000	735,000	91,000

Round 8.3 Cooperative Forecasts Summary Findings

- The Round 8.3 Forecasts show that the TPB Modeled Region would add slightly more than 1.6 million jobs, 2.1 million people and 908,000 households between 2010 and 2040.
- Round 8.3 Forecasts are approximately 1.3 percent higher than the Round 8.2 Forecasts
- The Region's "Inner Suburbs" – Fairfax, Montgomery and Prince George's counties and the cities of Fairfax and Falls Church – would collectively have the greatest total number of jobs, people and households throughout the 2010 to 2040 forecast period

Round 8.3 Cooperative Forecasts Summary Findings

- The “Outer Suburbs” – Charles, Frederick, Loudoun and Prince William counties, and the cities of Manassas and Manassas Park – would, as a group, experience the fastest rates of growth
- The Round 8.3 Forecasts indicate that 76 percent of all new jobs, 55 percent of the Region’s population growth, and 60 percent of all new households are anticipated within Activity Centers.
- Local governments continue to focus more growth in Activity Centers. Compared to Round 8.0, the Round 8.3 Forecasts for 2040 within Activity Centers contain 81,000 more jobs, 58,000 more people and 169,000 more households than Round 8.0.

Questions . . .