

ROUND 9.1 COOPERATIVE FORECASTS

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COG Community Planning and Services

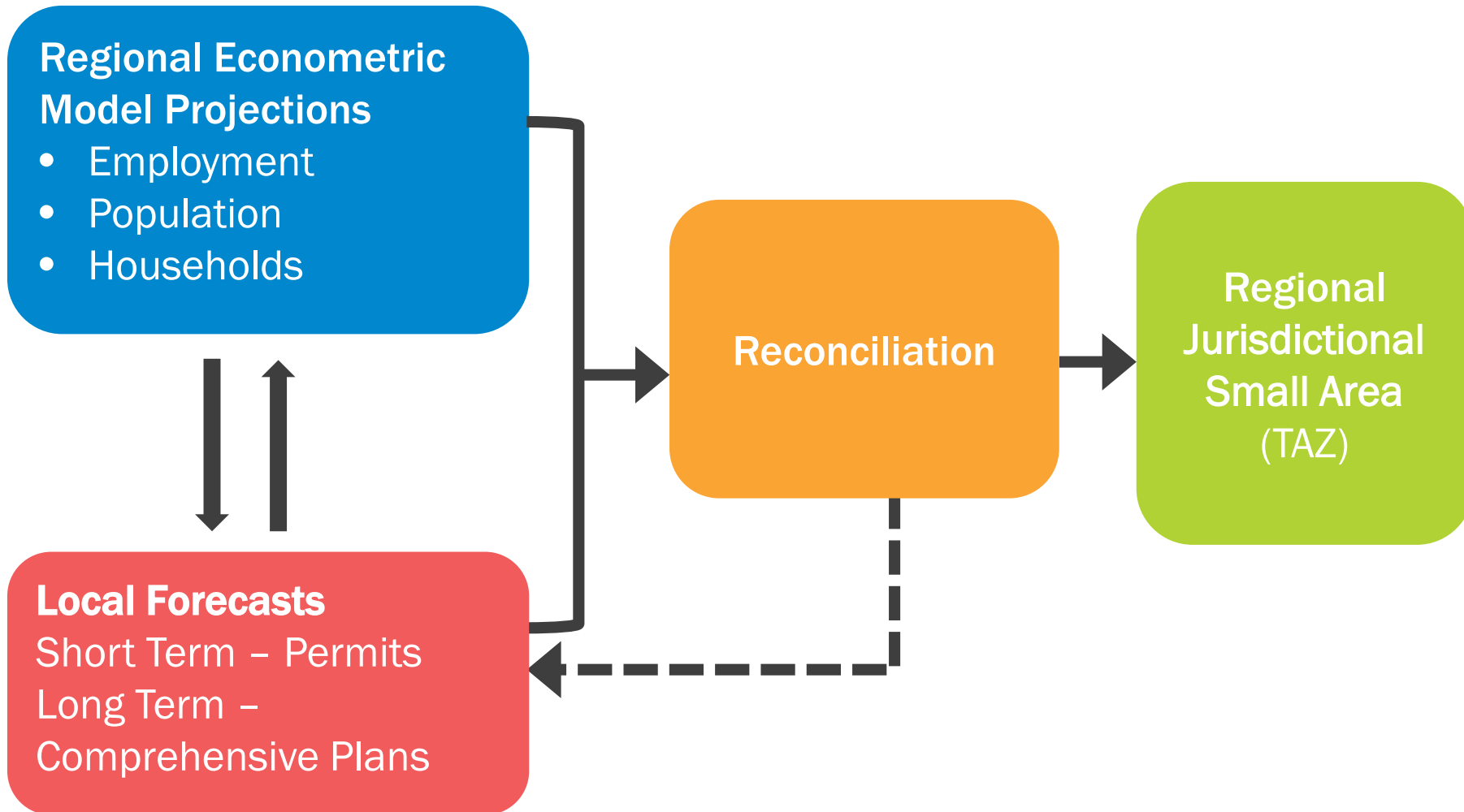
MWAQC Technical Advisory Committee
February 13, 2018

Round 9.1 Overview

- First update to Round 9.0 Forecasts that were approved in 2016
- Many COG jurisdictions updated their Forecasts but cumulative regional change is negligible
- Updated Forecasts also obtained for:
 - Baltimore region (BMC Round 8B)
 - Fredericksburg MPO (GWRC/FAMPO 2045)
 - Calvert and St. Mary's (C-SMMPO)
 - Clarke and Fauquier



MWCOG Cooperative Forecasting Process



Summary of Round 9.1 Cooperative Forecasts

COG / TPB Planning Area (Thousands)

	2015 to 2045			
	2015	2045	Number	Percent
Employment	3,160.9	4,273.9	1,113.0	35%
Population	5,387.3	6,925.7	1,538.3	29%
Households	2,010.9	2,660.0	649.1	32%



Summary of Round 9.1 Cooperative Forecasts

TPB Model Region (Thousands)

	2015 to 2045			
	2015	2045	Number	Percent
Employment	4,068.9	5,507.3	1,438.4	35%
Population	7,062.9	9,120.9	2,058.0	29%
Households	2,614.8	3,487.7	872.9	33%



Change in 2045 Forecast from Prior Round

COG / TPB Planning Area (Thousands)

	Round 9.0	Round 9.1	Number	Percent
Employment	4,291.2	4,273.9	-17.3	-0.4%
Population	6,876.0	6,925.7	49.7	0.7%
Households	2,651.3	2,660.0	8.7	0.3%

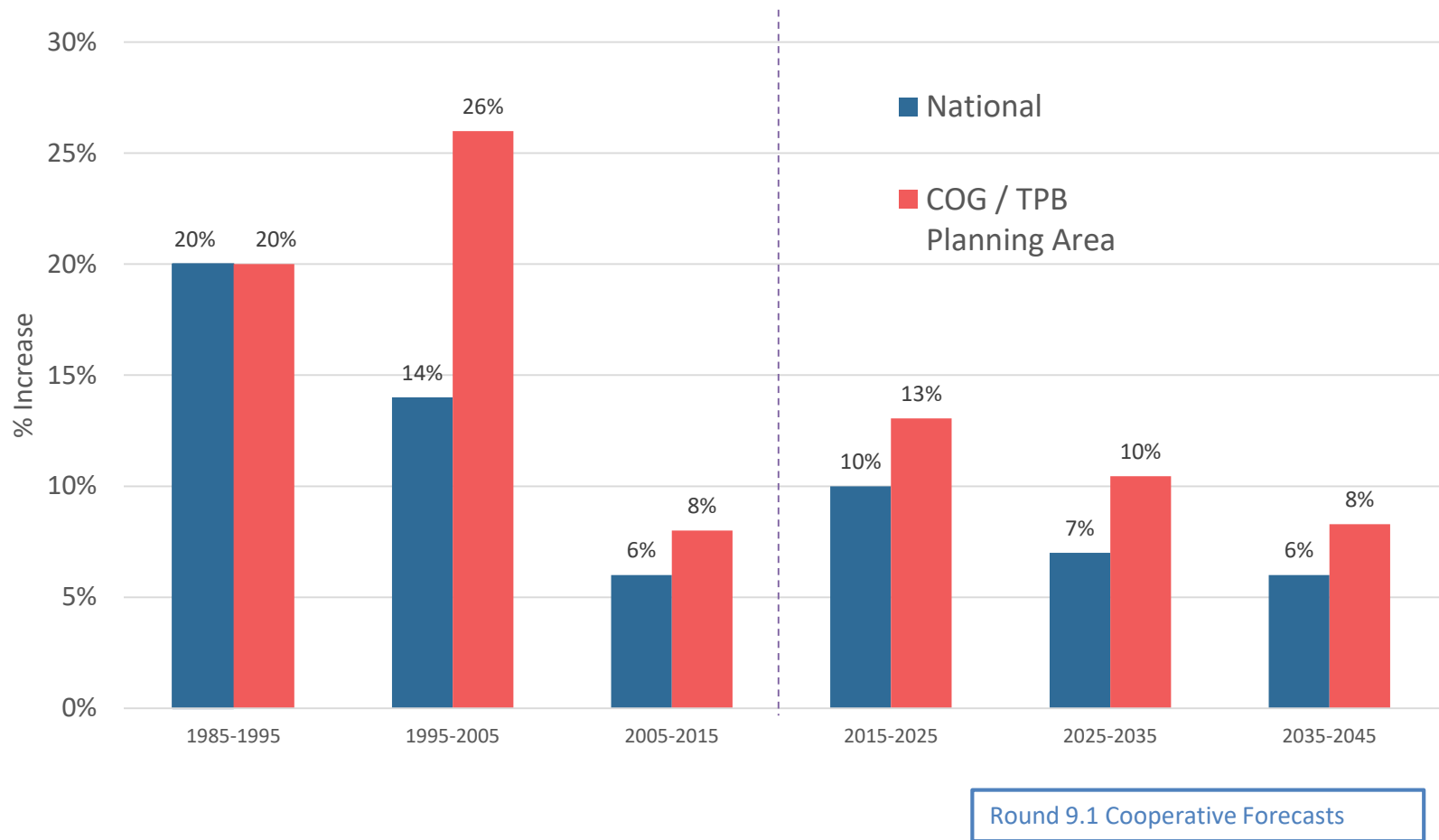
Change in 2045 Forecast from Prior Round

TPB Model Region (Thousands)

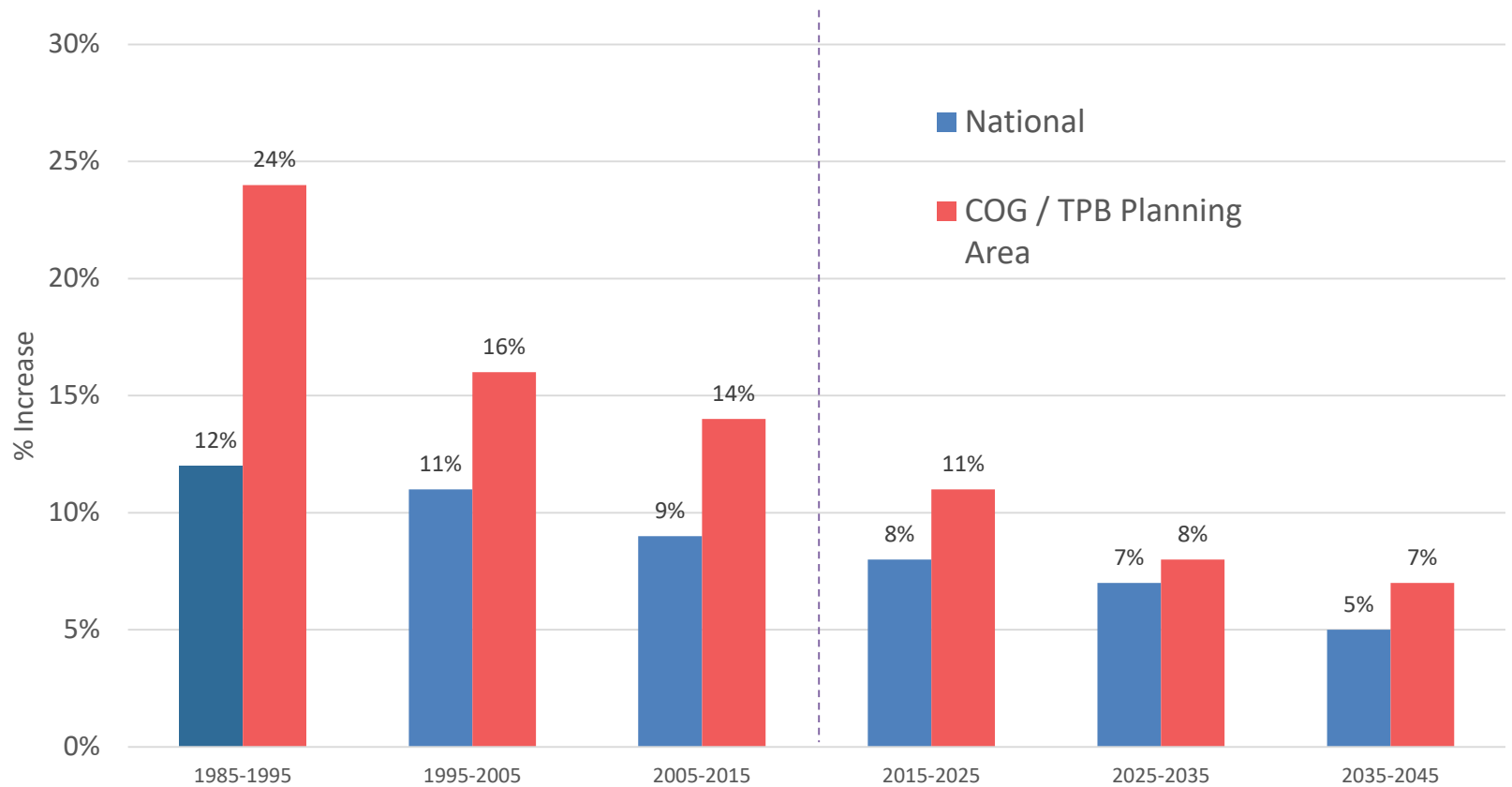
	Round 9.0	Round 9.1	Number	Percent
Employment	5,515.9	5,507.3	-8.6	-1.6%
Population	9,083.9	9,120.9	37.0	0.4%
Households	3,475.6	3,487.7	12.1	0.4%



Employment Change by 10-Year Increments National vs. COG / TPB Planning Area



Population Change by 10-Year Increments National vs. COG / TPB Planning Area

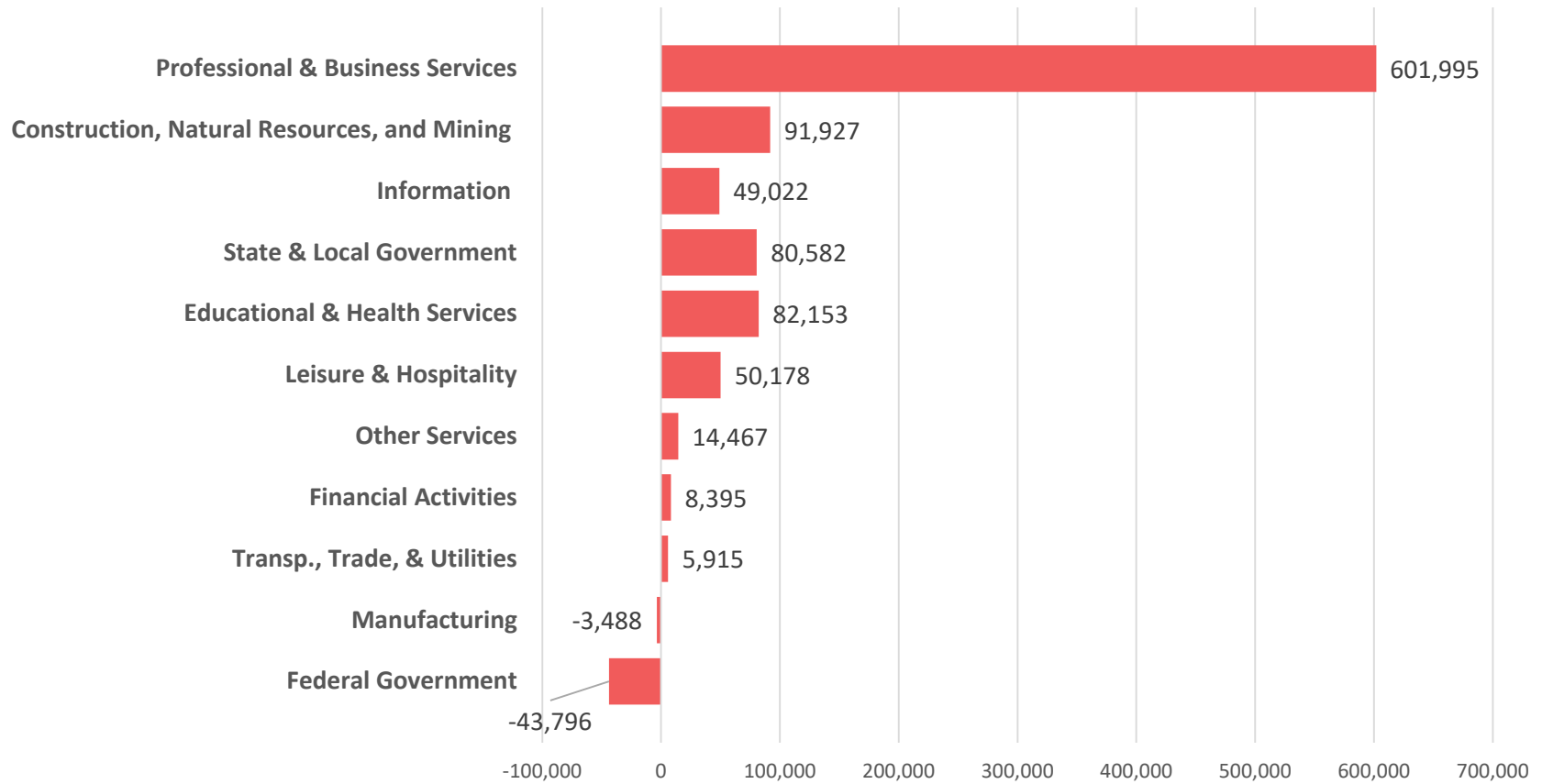


Round 9.1 Cooperative Forecasts



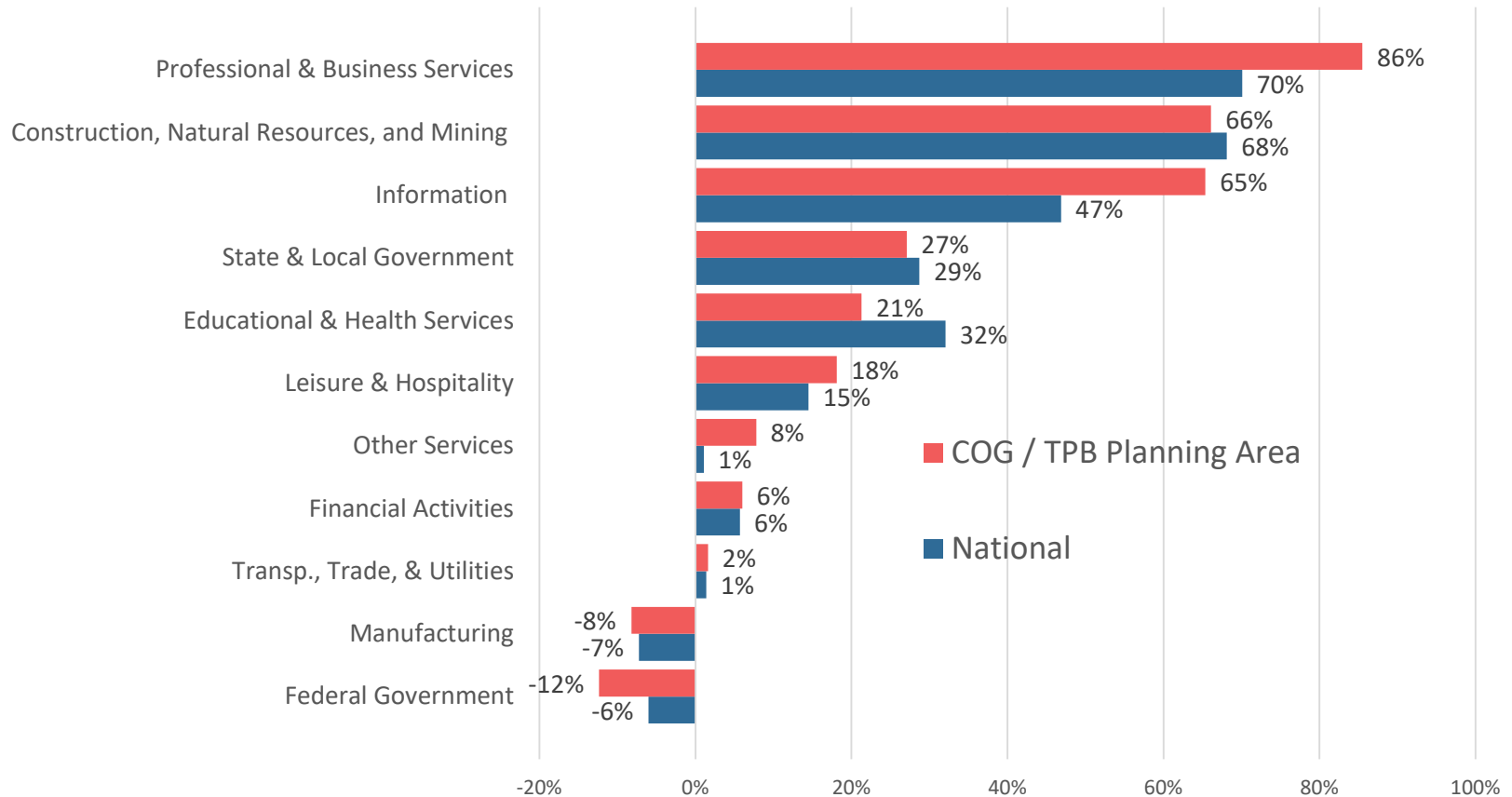
Employment Change by Sector 2015 – 2045

COG / TPB Planning Area



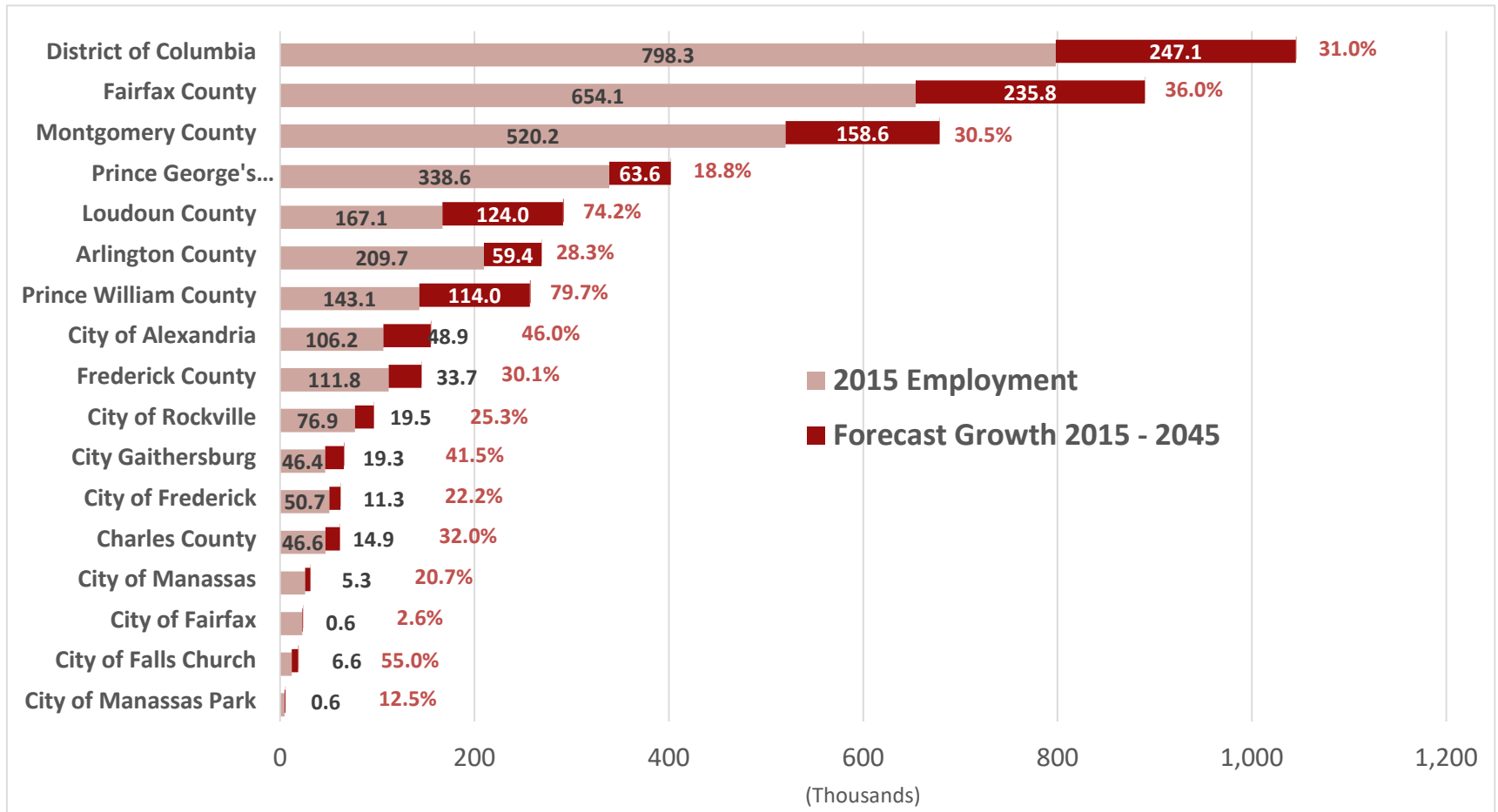
Employment Change by Sector 2015–2045

National vs. COG / TPB Planning Area



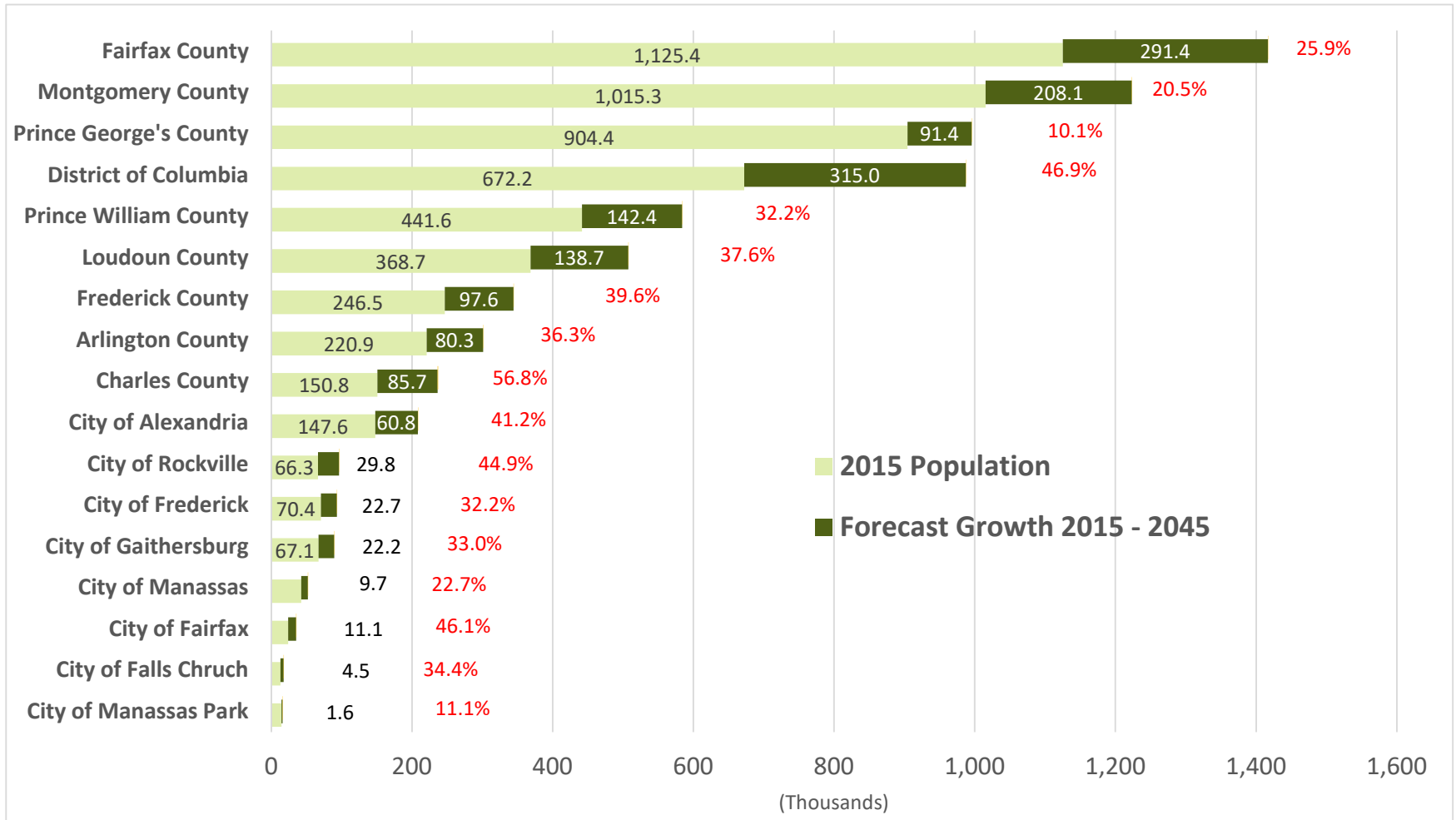
Forecast 2015 to 2045 Employment Growth

(Thousands)



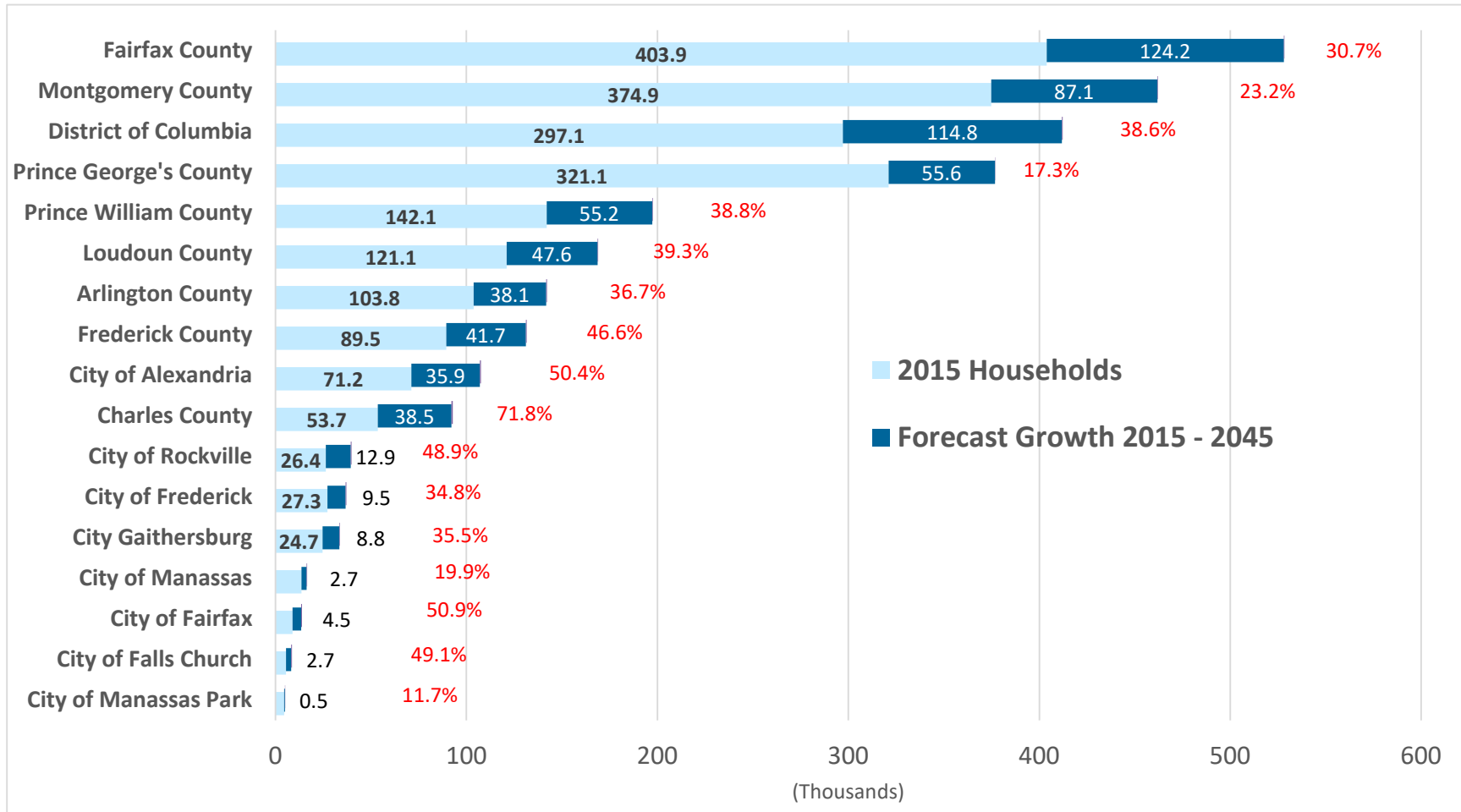
Forecast 2015 to 2045 Population Growth

(Thousands)



Forecast 2015 to 2045 Household Growth

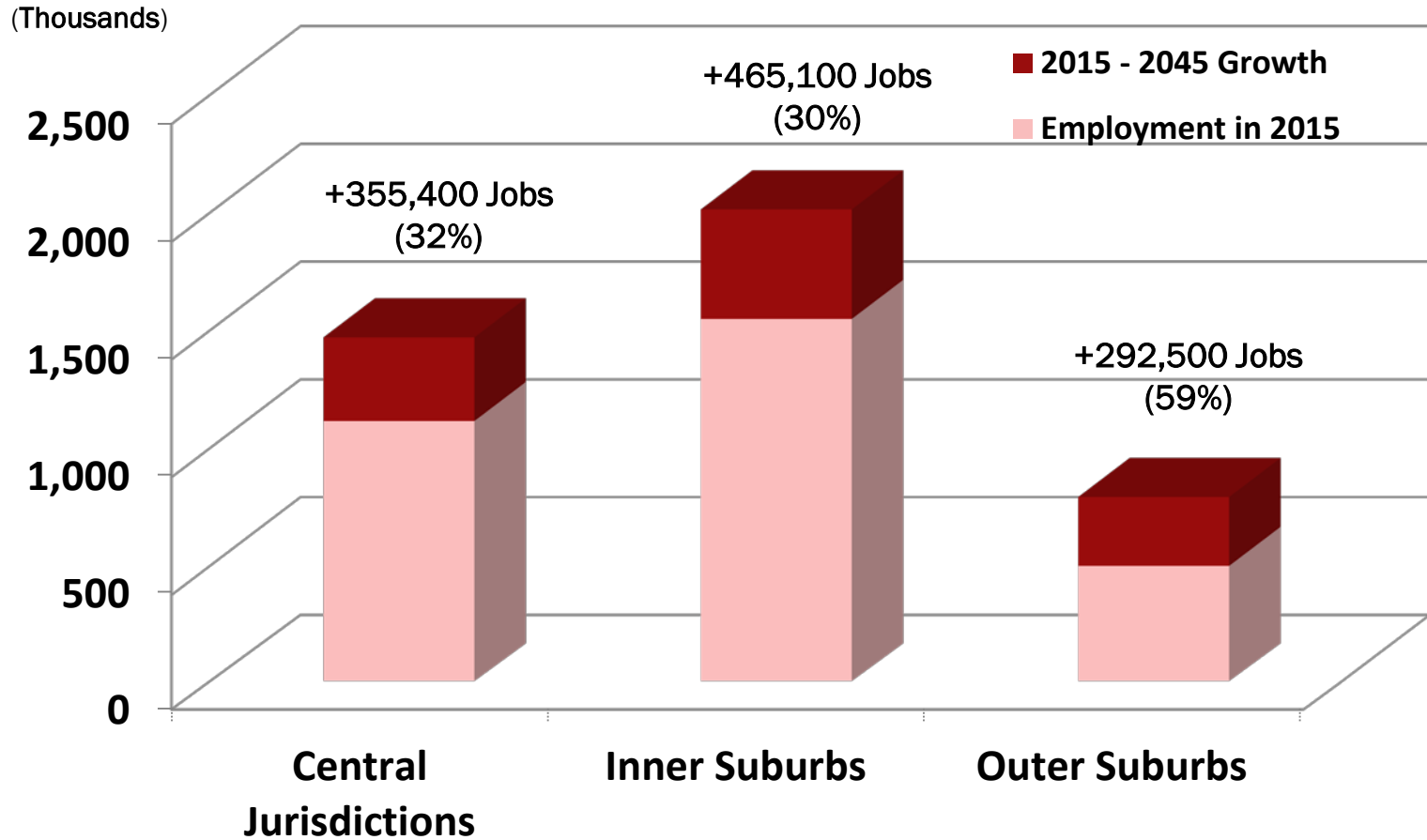
(Thousands)



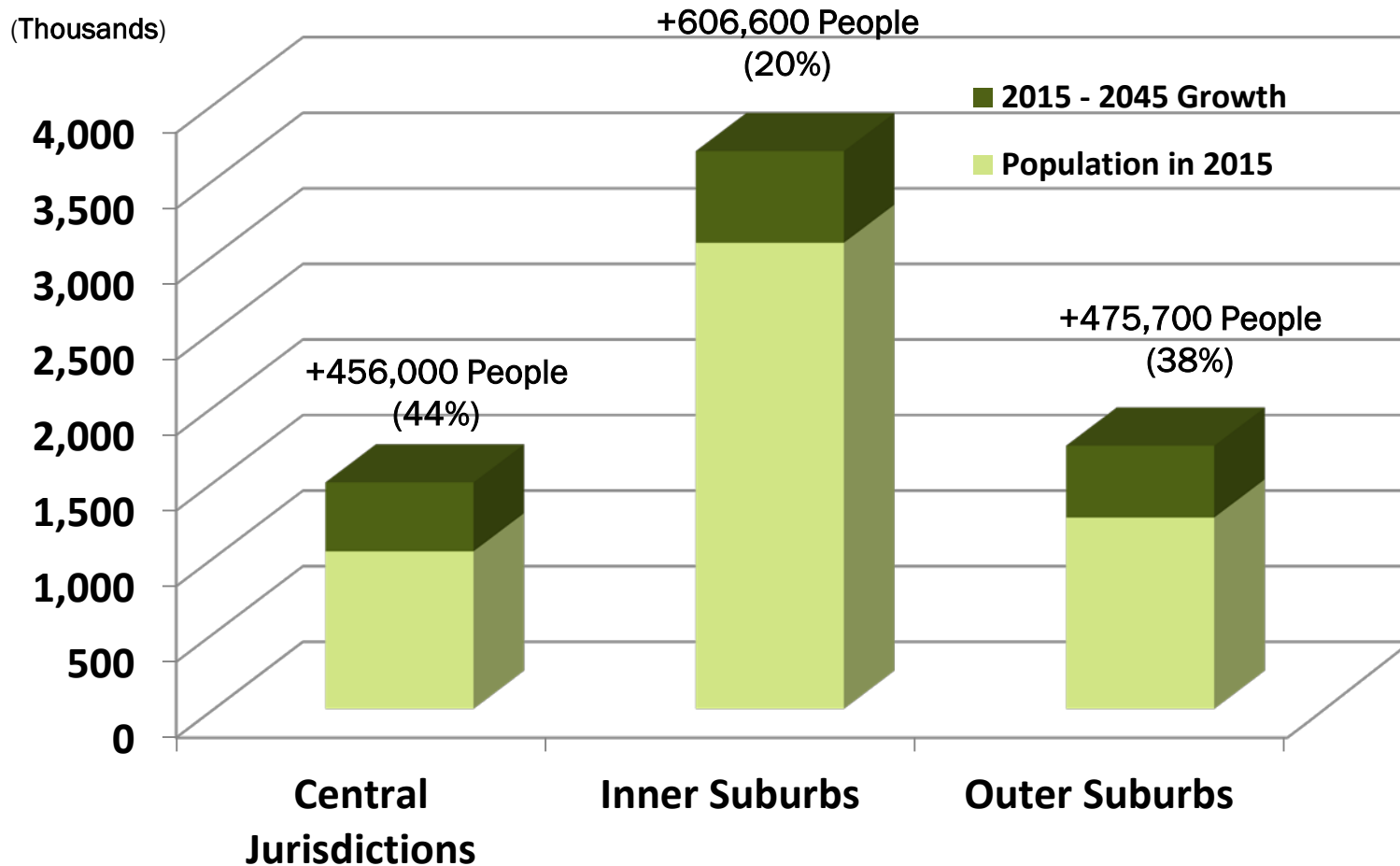
Forecasts for Jurisdictions in COG / TPB Planning Area Grouped Geographically for Analysis Purposes

Central Jurisdictions	Inner Suburbs	Outer Suburbs
<ul style="list-style-type: none"> • District of Columbia • Arlington • Alexandria 	<ul style="list-style-type: none"> • Montgomery • Prince George's • Fairfax County • Fairfax • Falls Church 	<ul style="list-style-type: none"> • Loudoun • Prince William • Manassas • Manassas Park • Charles • Frederick County MD

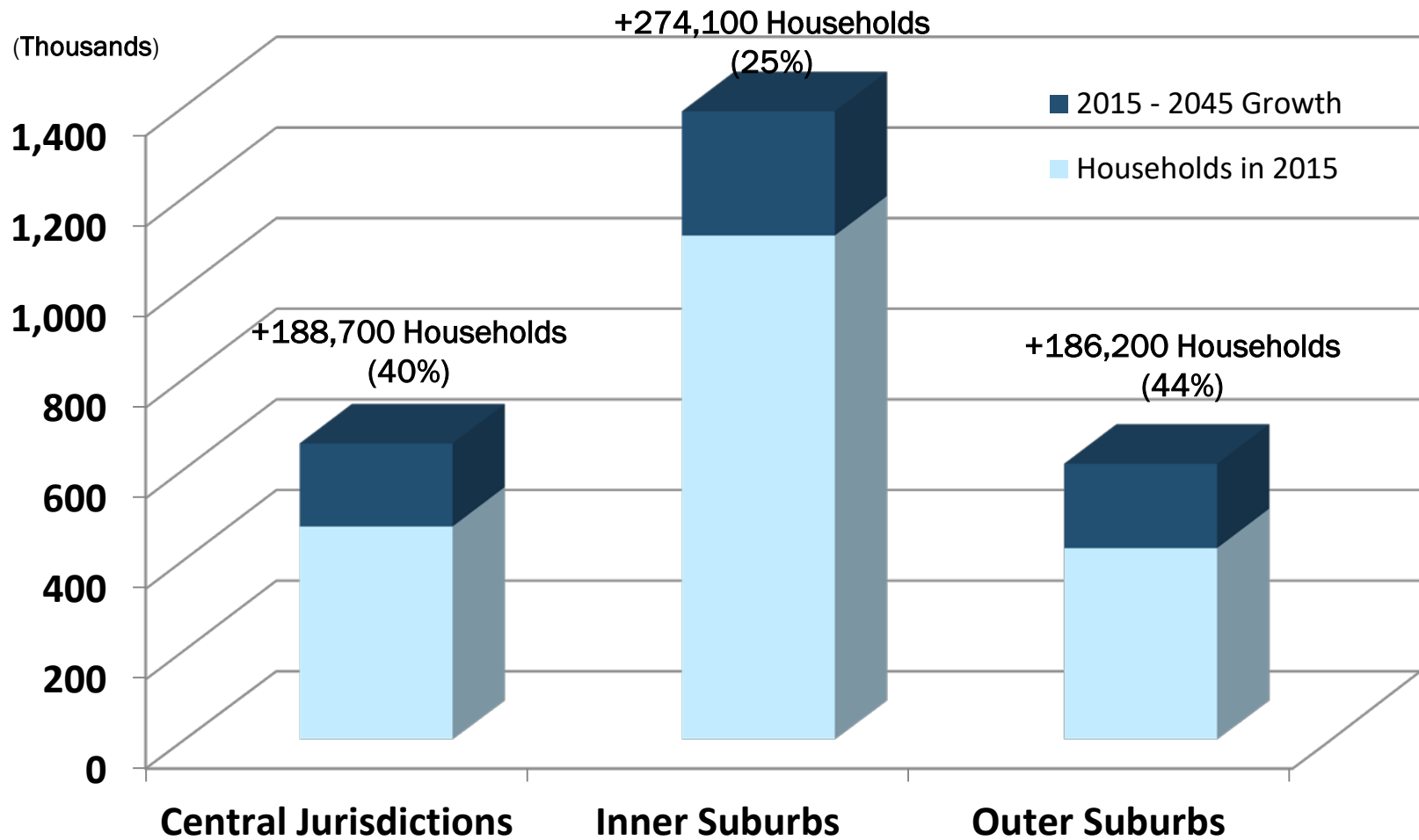
Forecast Employment Growth, 2015 - 2045



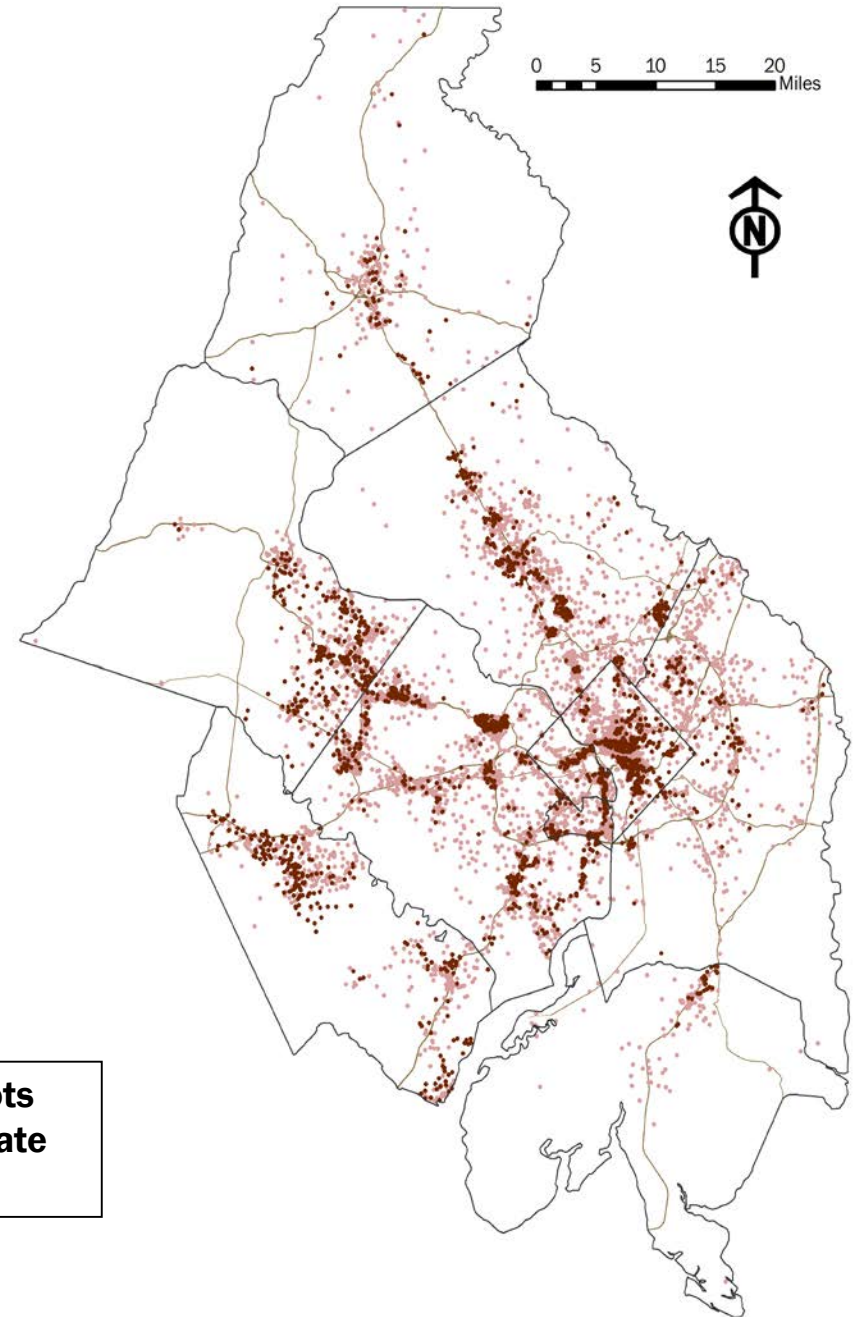
Forecast Population Growth, 2015 - 2045



Forecast Household Growth, 2015 - 2045



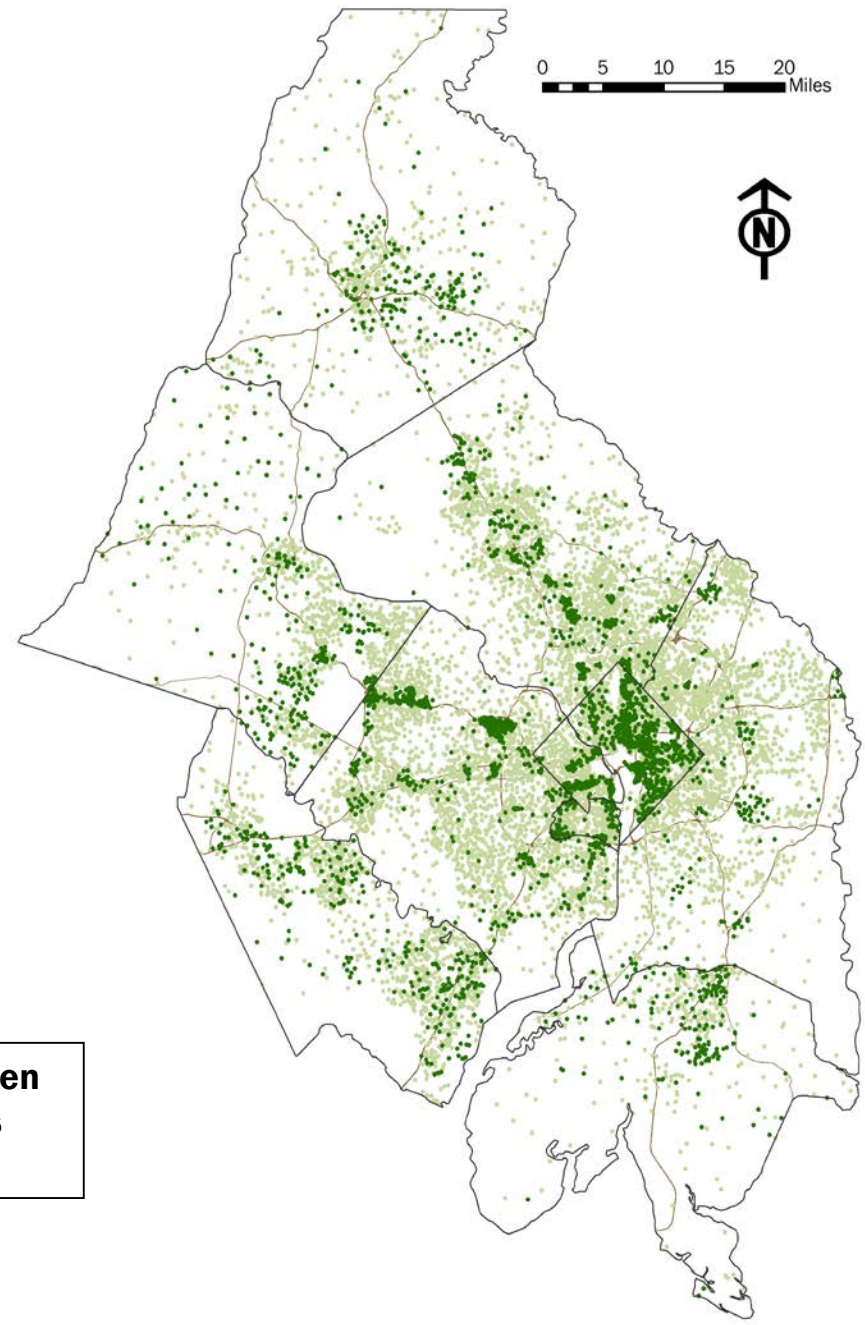
2015 Employment and 2015 to 2045 Projected Employment Growth *(Round 9.0)*



Note: One dot represents 500 jobs. Light red dots indicate 2015 employment, dark red dots indicate 2015 to 2045 employment growth

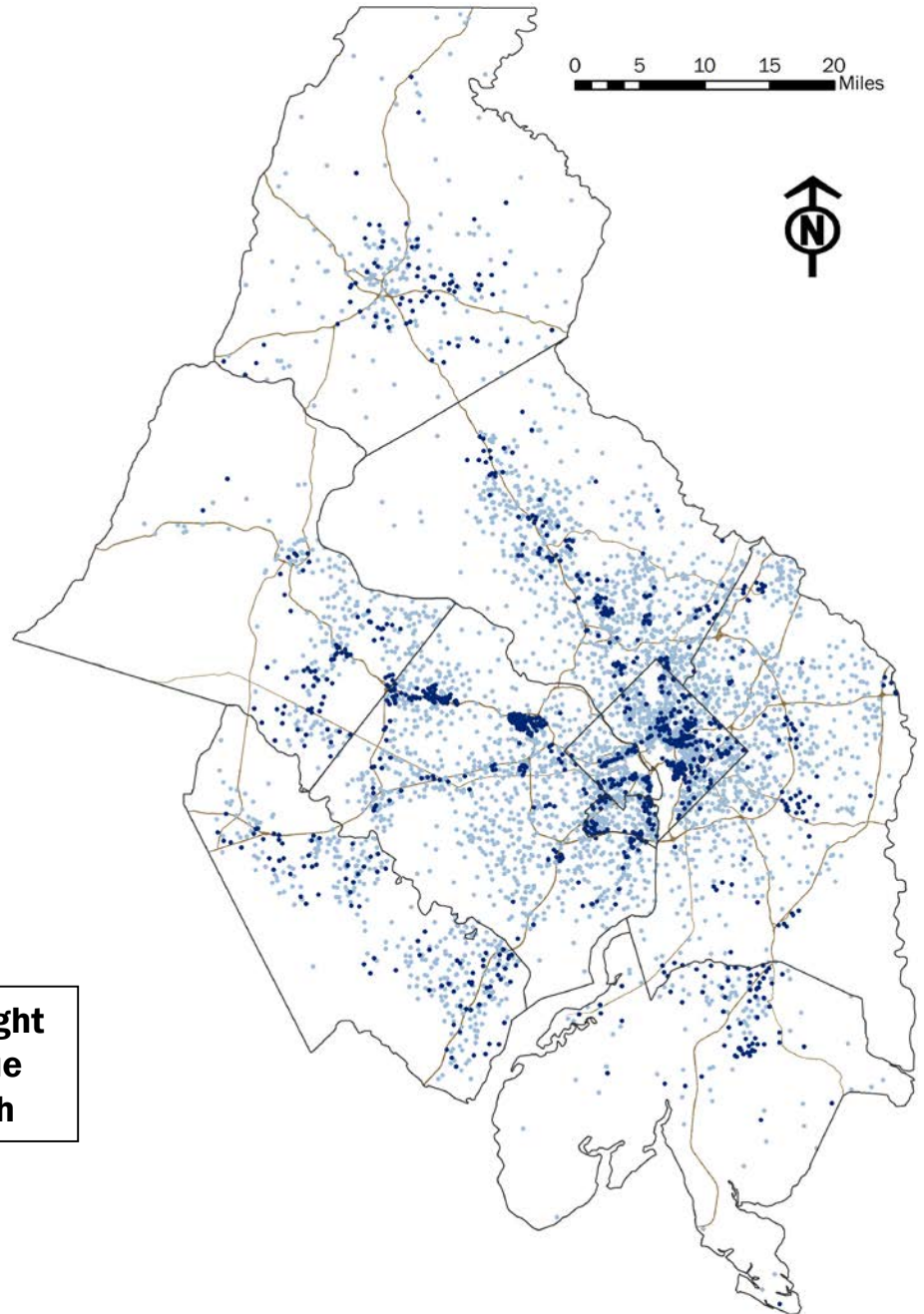


2015 Population and 2015 to 2045 Projected Population Growth *(Round 9.0)*



Note: One dot represents 500 people. Light green dots indicate 2015 population, dark green dots indicate 2015 to 2045 population growth

2015 Households and 2015 to 2045 Projected Household Growth *(Round 9.0)*



Note: One dot represents 500 households. Light blue dots indicate 2015 households, dark blue dots indicate 2015 to 2045 household growth

Next steps

- Awaiting final TAZ data files to transmit to TPB staff for AQ Conformity analysis
- Briefing to TPB February 21
- Staff analysis of sub-regional growth (corridors, Activity Centers, Transit Station areas, etc.)
- Final approval in Fall concurrent with TPB approval of Conformity results
- Monitor planning and economic trends:
 - Federal presence and economy
 - Commercial space utilization and re-purposing
 - Demographic trends
 - Housing affordability



Questions?



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