

Briefing on the Round 8.0 Cooperative Forecasts

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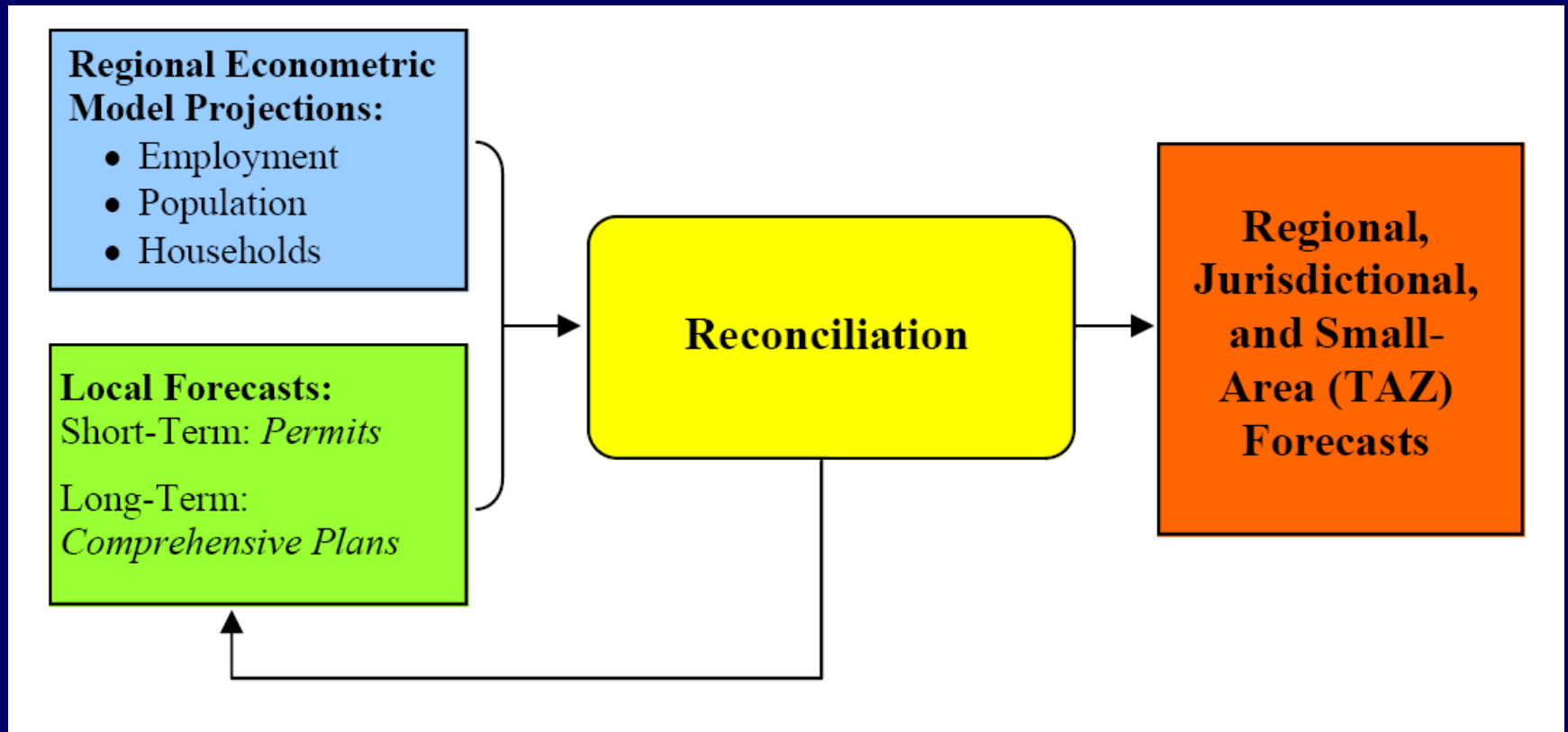
COG Board of Directors Meeting

November 10, 2010

The Round 8.0 Cooperative Forecasts . . .

- . . . include a new econometric benchmark forecasts based on revised assumptions of the U.S. economy.
- . . . are being used in this year's TPB's Air Quality Conformity Analysis of the TIP and CLRP
- . . . include a new Traffic Analysis Zones (TAZs) structure (TPB TAZ 3,722) almost doubling the number of TAZs from the previous series.
- . . . will be an *initial* basis for the update to the COG Regional Activity Centers and Clusters.

Cooperative Forecasting Process

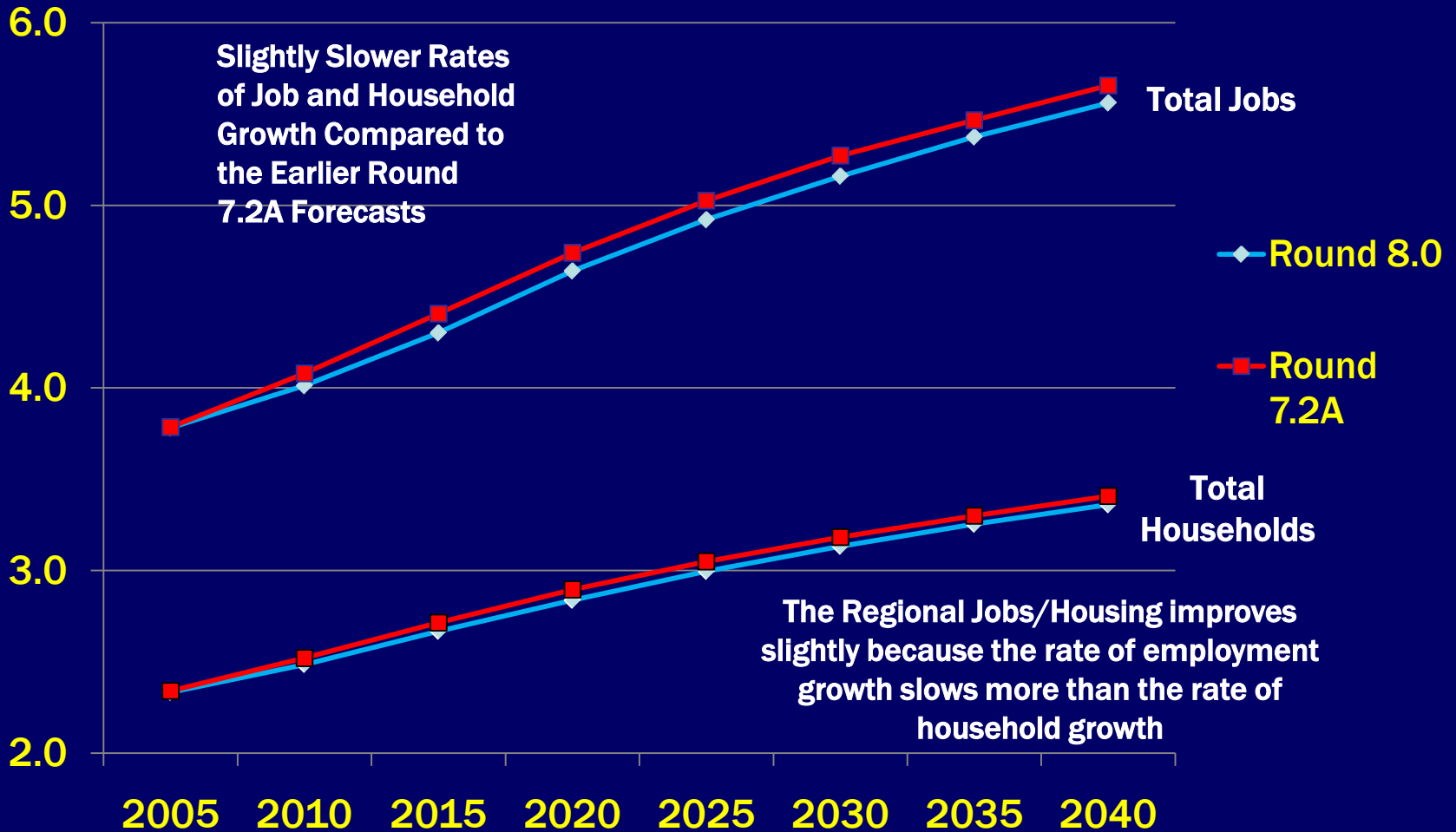


Key Economic Factors Influencing the Round 8.0 Growth Forecasts

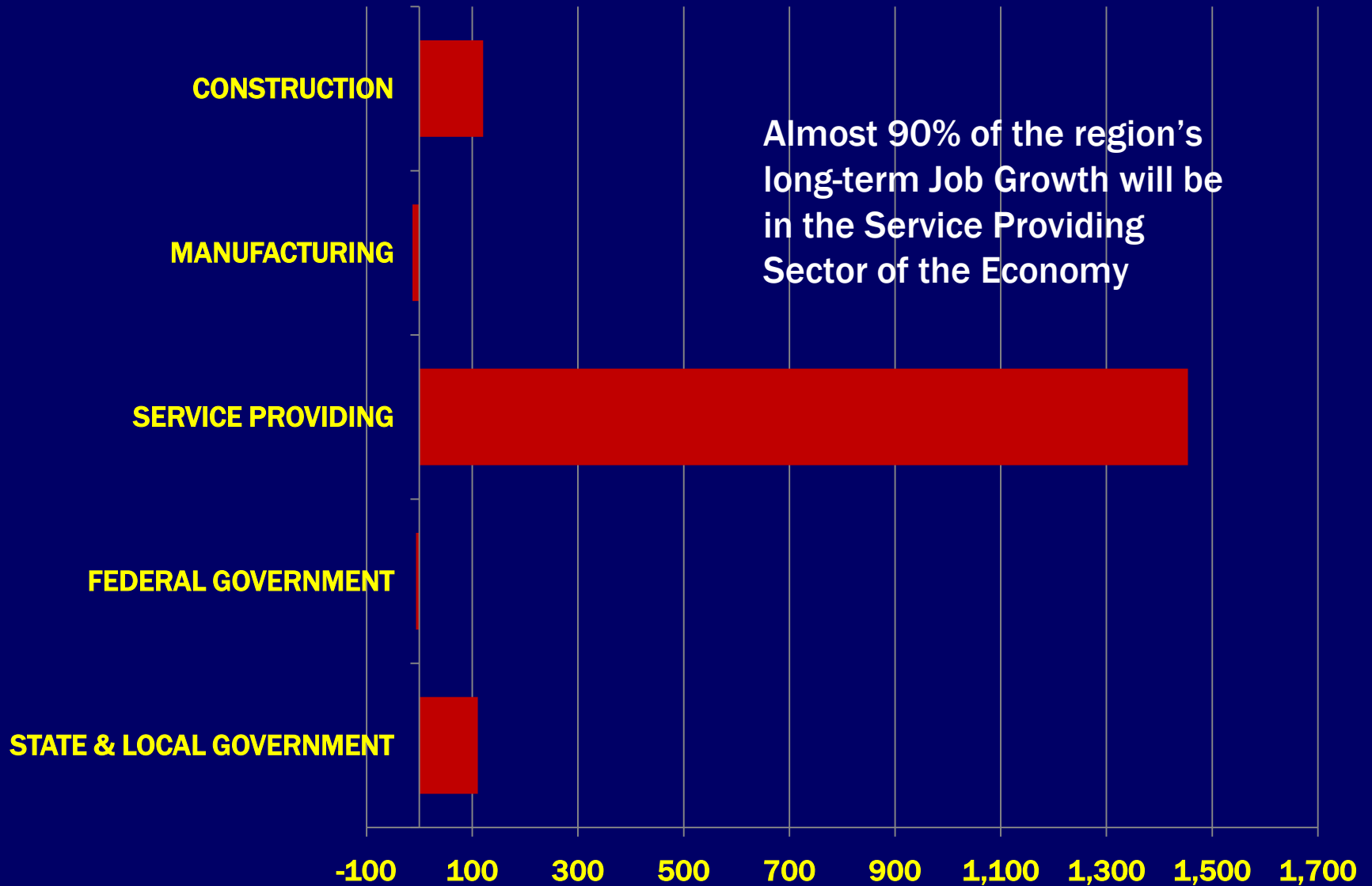
- The National Recession
- Higher Rates of Unemployment
- Foreclosures and Reduction in Home Values
- Tight Capital Markets
- Slower Pace of Housing Sales and Leasing of Office Space
- BRAC and Stabilizing Presence of the Federal Government

Impact of Key Economic Factors on Round 8.0 Growth Forecasts

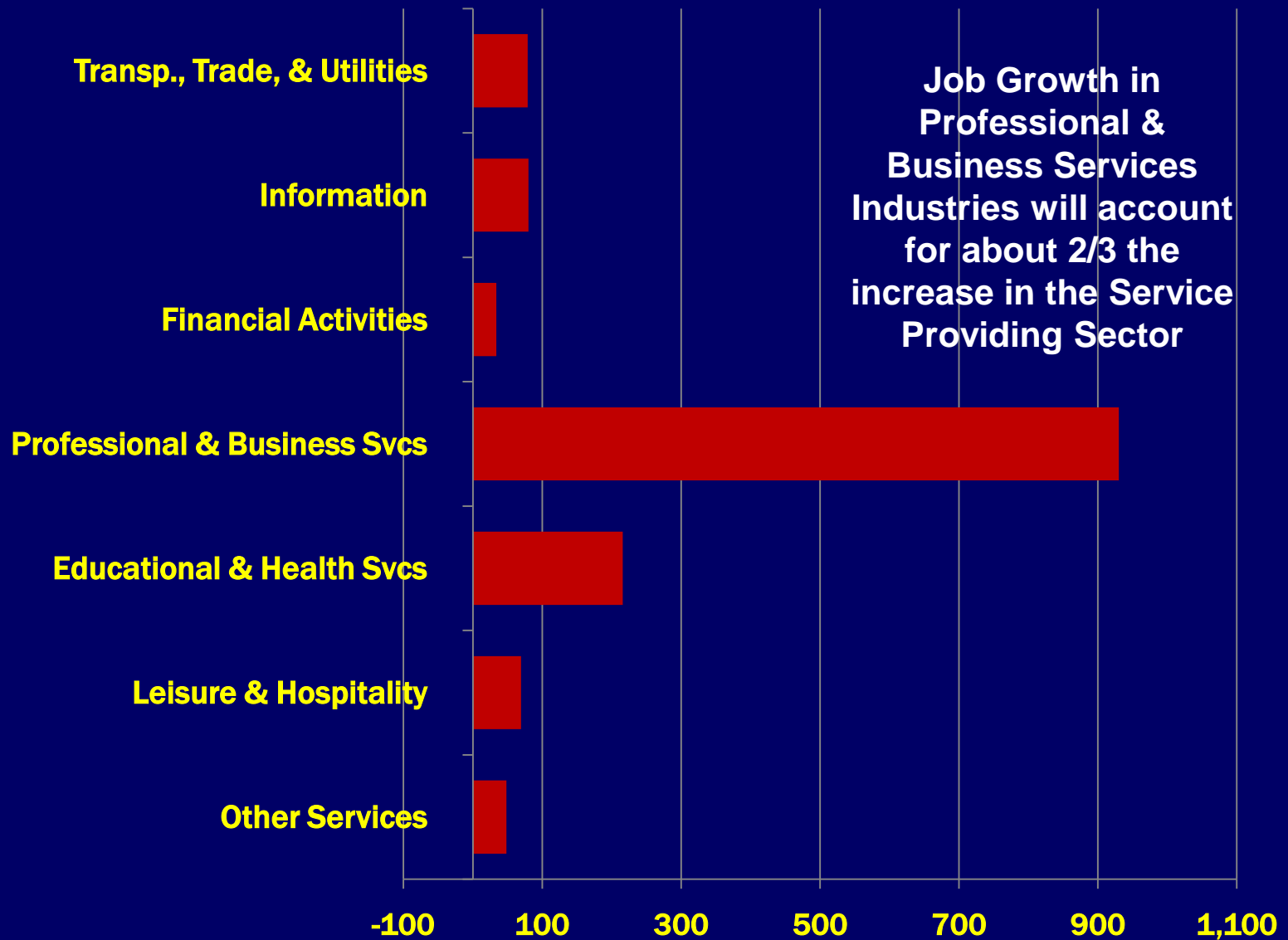
(Millions)



Forecast 2005 to 2040 Job Growth by Major Sector in Metropolitan Washington (Thousands of Jobs)

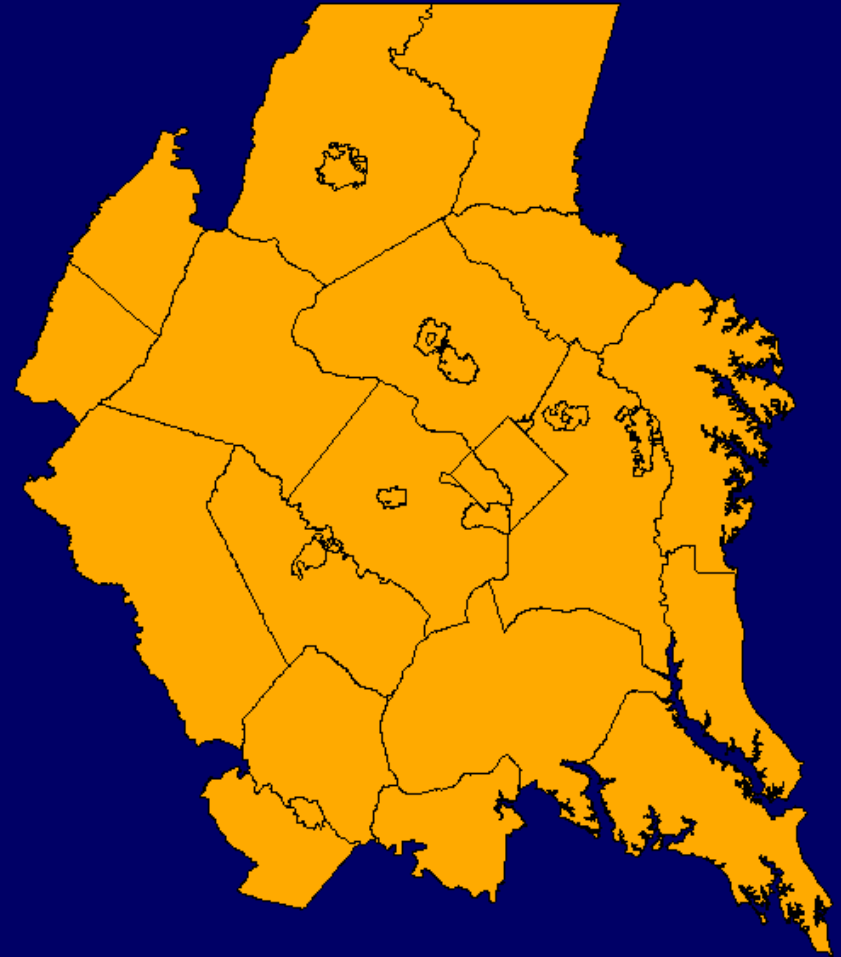


Forecast 2005 to 2040 Job Growth in Service Providing Sector Industries (Thousands of Jobs)



Growth Forecasts for All Jurisdictions in the TPB Modeled Area are included in Round 8.0.

- **COG Members**
- **BMC Counties in TPB Modeled Area**
 - Anne Arundel, Carroll & Howard
- **Tri-County Council**
 - Calvert, Charles & St. Mary's
- **FAMPO**
 - Fredericksburg, King George, Spotsylvania & Stafford
- **Others**
 - Clarke, Fauquier & Jefferson



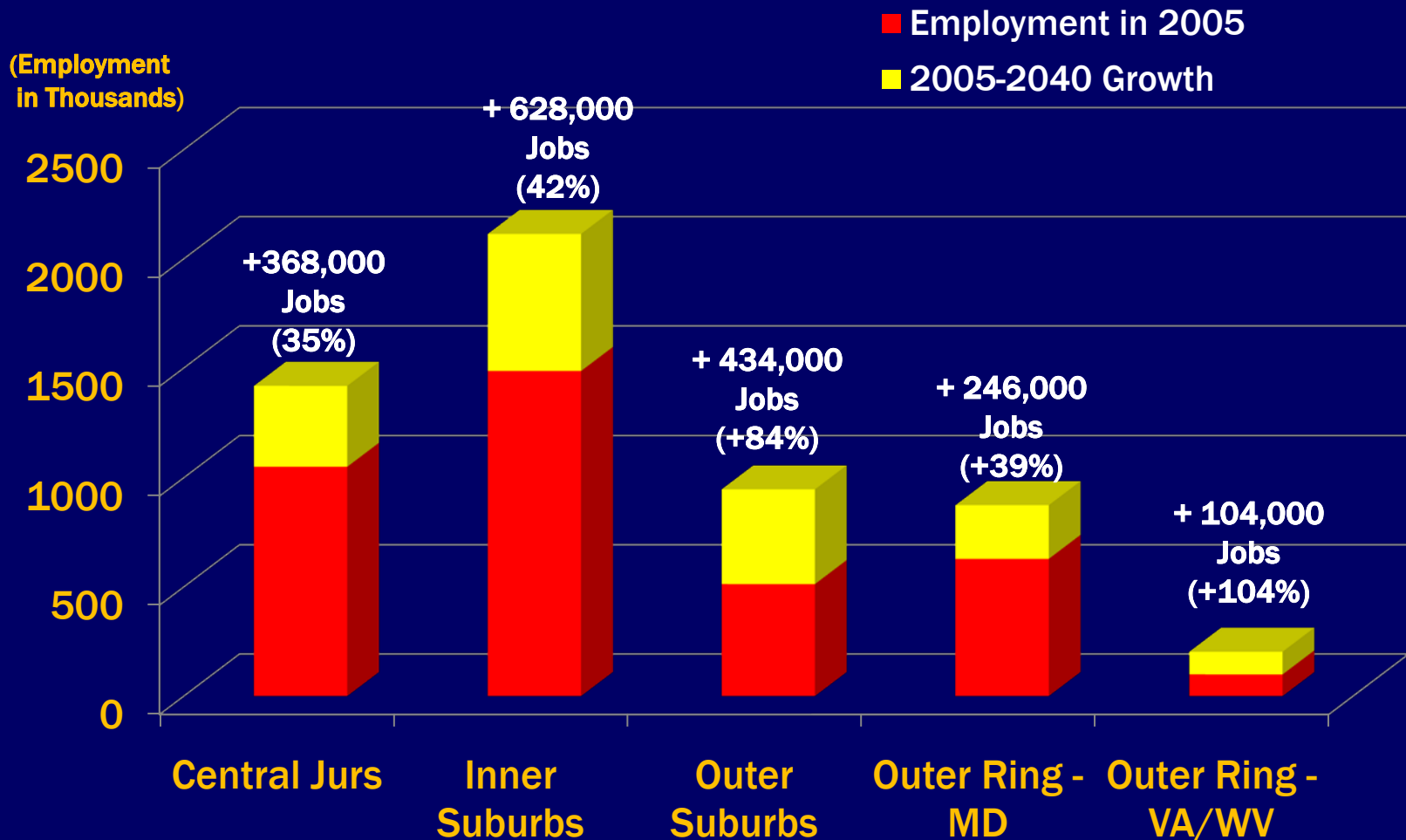
Round 8.0 Growth Forecasts

TPB Modeled Area	2005	2040	Change 2005- 2040	Percent Change
Jobs (in Millions)	3.8	5.6	+1.8	+47%
Households (in Millions)	2.3	3.3	+1.0	+43%
Population (in Millions)	6.3	8.6	+2.3	+38%

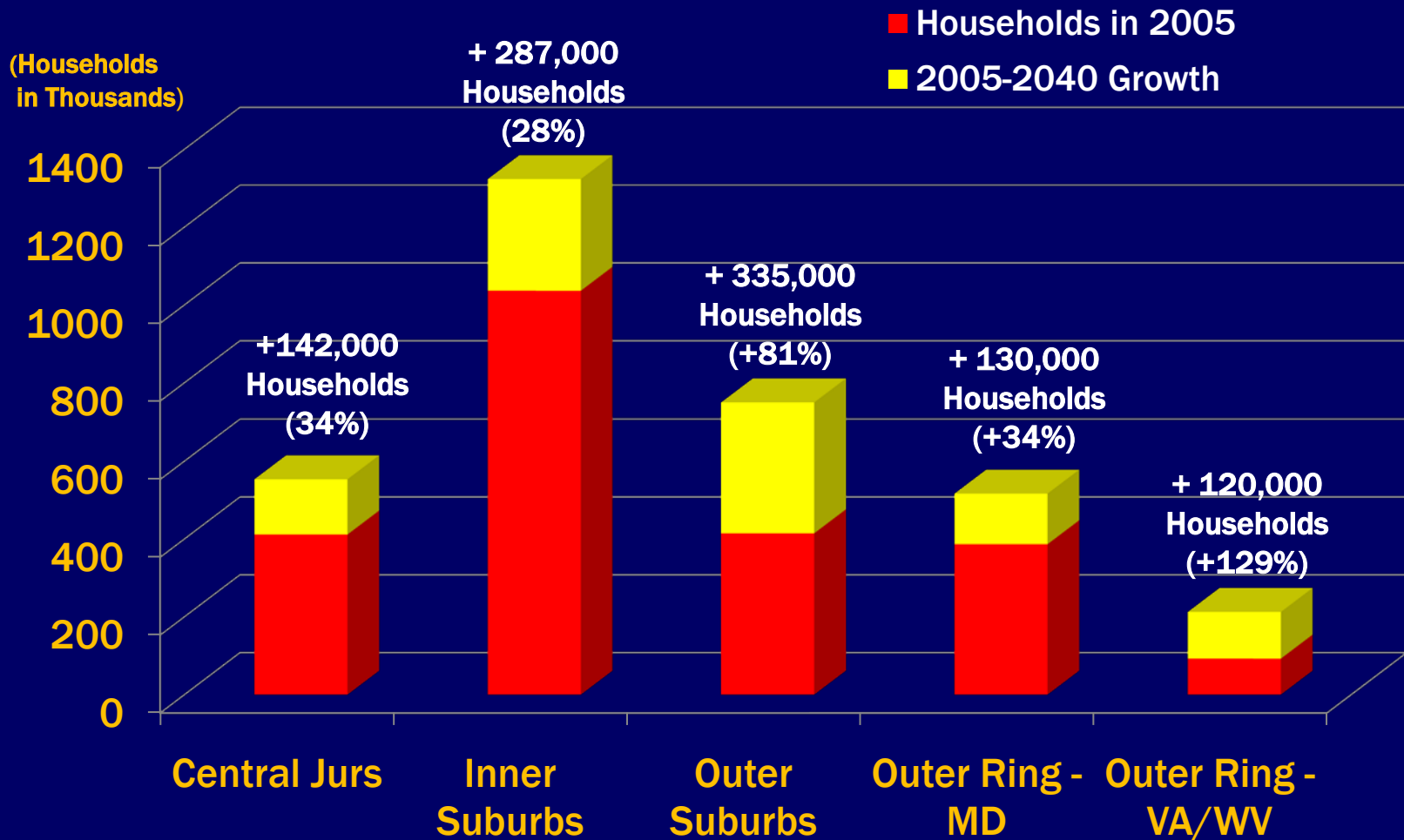
Forecasts for Jurisdictions in the TPB Modeled Area Have Been Grouped Geographically for Analysis Purposes in this Briefing.

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 • Calvert • Charles • Frederick County (MD) • Stafford 	<ul style="list-style-type: none"> • Anne Arundel • Carroll • Howard • St. Mary's 	<ul style="list-style-type: none"> • Fredericksburg • King George • Spotsylvania (portion) • Clarke • Fauquier • Jefferson (WV)

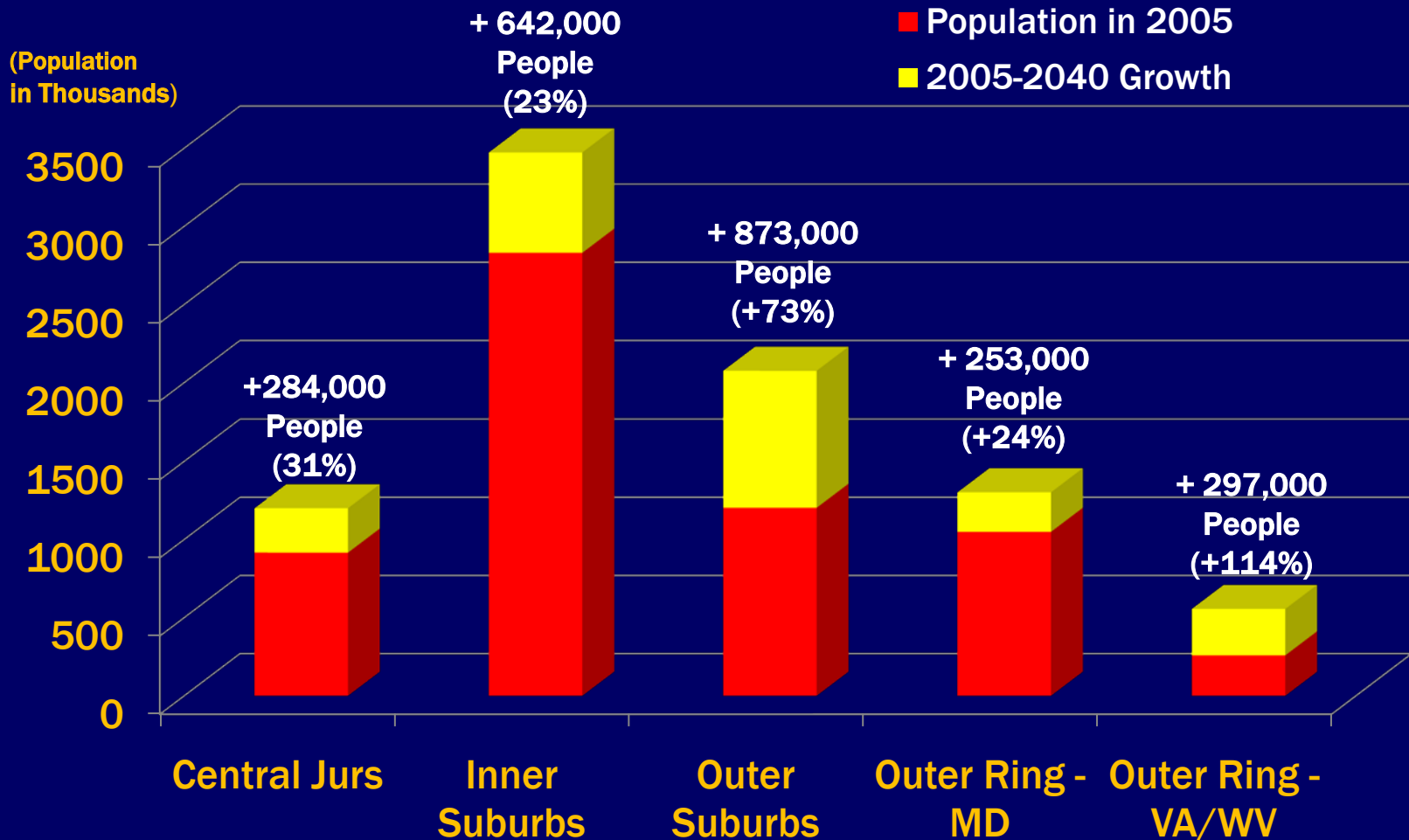
Forecast Employment Growth (2005-2040)



Forecast Household Growth (2005-2040)



Forecast Population Growth (2005-2040)

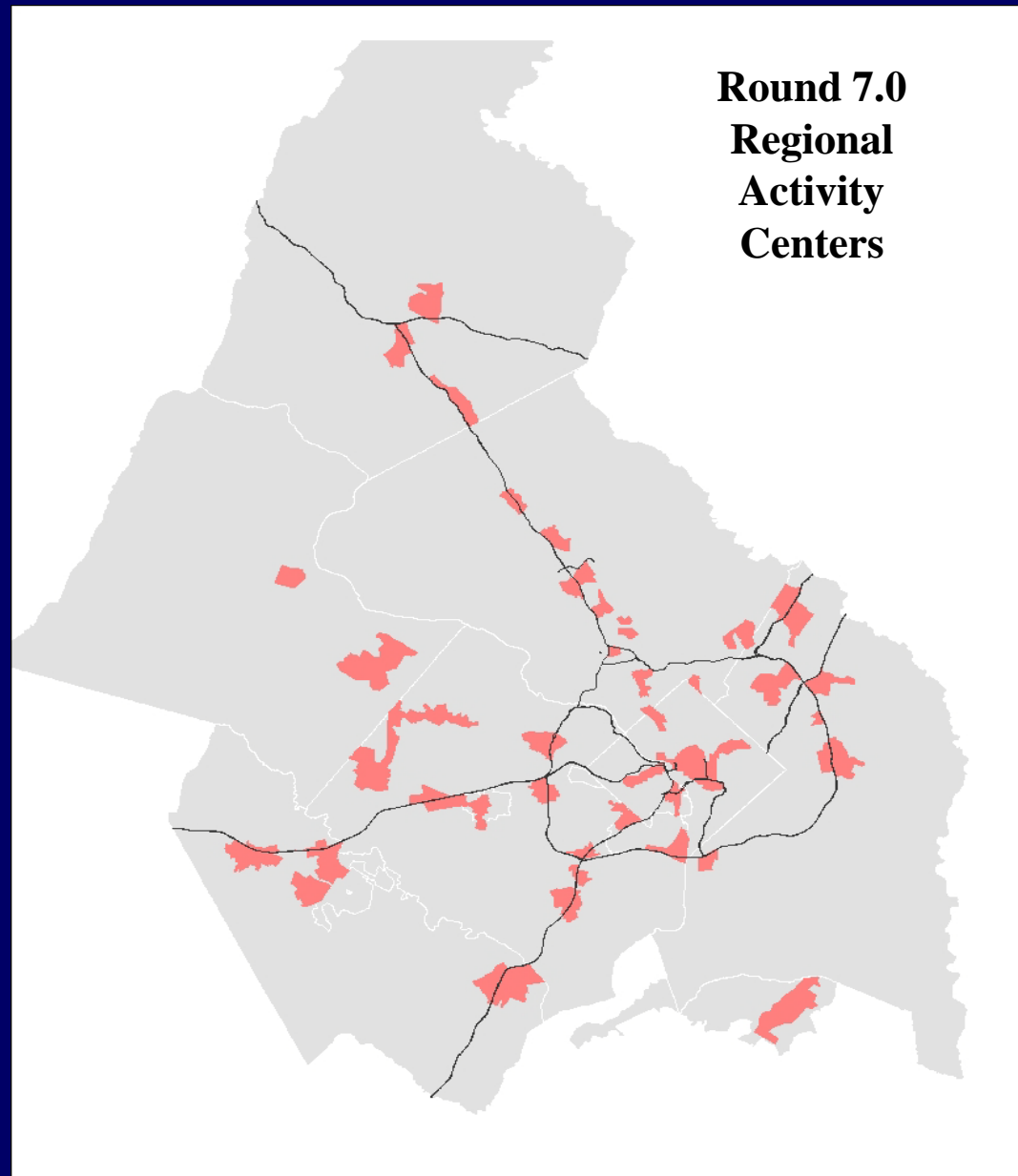


Regional Activity Centers

In 2007, the MDPC and COG Board approved Round 7.0 Regional Activity Centers and Cluster maps and data

These maps and data identified 61 Regional Activity Centers

The identified Round 7.0 Activity Centers and Clusters together with new Round 8.0 Forecasts will be an *initial* starting point for the update of the COG Regional Activity Centers and Clusters by the Region's Planning Directors, the MDPC and the COG Board



Preliminary Analysis of Round 8.0 Forecasts for Round 7.0 Regional Activity Centers

- Preliminary Analysis of Forecast Round 8.0 Growth in Round 7.0 Regional Activity Centers show:
 - 2005 to 2040 Employment in these activity centers increasing by 48%, about the same as for the region as a whole
 - 2005 to 2040 Households in these activity centers increasing by 107%, more than twice that of the region as a whole
 - By 2040, 55% of the region's total jobs and 19% of the region's total households are now forecast to be concentrated in the Round 7.0 Regional Activity Centers that constitute less than 5% of the region's total land area.

Round 8.0 Cooperative Forecasts

Key Findings

- Slightly slower rates of job and household growth are now forecast in comparison to the earlier Round 7.2A forecasts
- Also, in comparison to Round 7.2A, a slightly improved regional Jobs/Housing Balance is seen. This will reduce the number of long-distance in-commuters from external areas
- The greatest absolute increase in jobs is forecast for the region's Inner Suburbs and the greatest absolute increase in households is forecast for the Outer Suburbs
- Preliminary analysis of the Round 8.0 Forecasts suggests that more higher density housing is now being planned for the currently-defined centers, supporting the *Region Forward*, COG and TPB goals of creating dynamic, mixed-use centers