ROUND 9.2 GROWTH TRENDS TO 2045

Cooperative Forecasting in Metropolitan Washington

June 2022

Metropolitan Washington
Council of Governments

ROUND 9.2 GROWTH TRENDS TO 2045:
COOPERATIVE FORECASTING IN METROPOLITAN WASHINGTON
Prepared by the Cooperative Forecasting and Data Subcommittee on behalf of the Planning Directors
Technical Advisory Committee

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The Metropolitan Washington Council of Governments (COG) is an independent, nonprofit
association that brings area leaders together to address major regional issues in the District of
Columbia, suburban Maryland, and Northern Virginia. COG's membership is comprised of 300
elected officials from 24 local governments, the Maryland and Virginia state legislatures, and U.S.
Congress.

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INTRODUCTION

Local governments in metropolitan Washington have worked cooperatively for many years to develop region-wide and neighborhood level forecasts of employment, population, and households. The very first round of Cooperative Forecasts – Round 1 – was adopted by the Metropolitan Washington Council of Governments (COG) Board in 1976. 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 COG, enables local, regional, and federal agencies to coordinate planning decisions using common assumptions about future growth and development in the region. Each series of forecasts, or a "round," provides land use activity forecasts of employment, population, and households by five-year increments. Each round covers a period of 20 to 30 years.

The Cooperative Forecasting process provides data necessary for regional planning activities including analyzing the effects of growth and developing 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.

Map of COG Member Governments
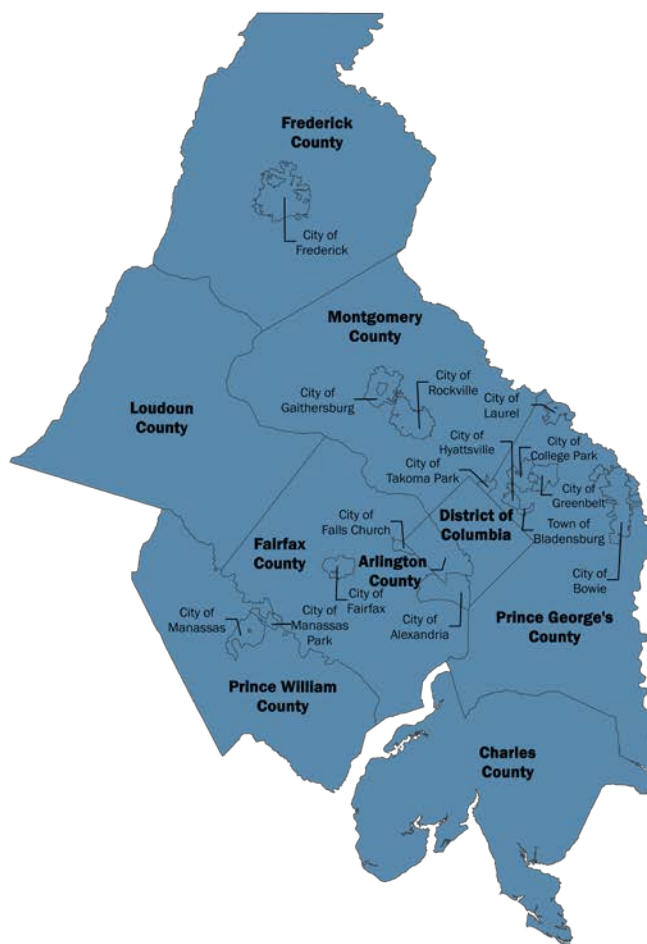
According to the Round 9.2 Cooperative Forecasts, between 2020 and 2045, the region will add more than:

1.3 million people
881,000 jobs
536,000 households

PROCESS

The Cooperative Forecast is a multi-stage, "top-down/bottom-up" process undertaken by COG's Planning Directors Technical Advisory Committee (PDTAC) and the Cooperative Forecasting and Data Subcommittee. It employs a regional econometric model and local jurisdictional forecasts. The model projects employment, population, and households for the metropolitan Washington region based on national economic trends and local demographic factors.

While the model is based on the COG / Transportation Planning Board (TPB) Planning Area geography, at the time of the development of the Round 9.0 model the urbanized portion of Fauquier County, Virginia was not included. Concurrently, local jurisdictions develop independent 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.

Figure 1: Cooperative Forecasting Process
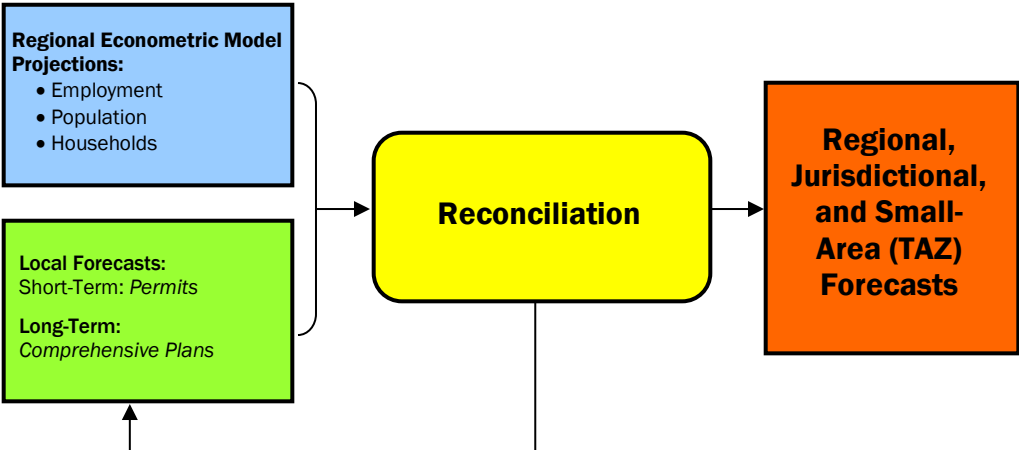
The Cooperative Forecasting and Data Subcommittee, which is comprised of local government planners, economists, and demographers, review and reconcile the two sets of projections. The model and local jurisdictional projections must be within three percent of each other for the new set of Cooperative Forecasts to be reconciled.

The forecasts are presented to and approved by the COG PDTAC and the COG Board of Directors.

Recognizing that market conditions and policies may change, the subcommittee reviews the forecasts annually and allows local governments to make minor adjustments. The forecasts may also be adjusted to reflect local governments' assessment of the likely housing and employment impact due to major new transportation facilities. Updated forecasts are referred to as Round 8.1, Round 8.2, etc.

Table 1: Previous Rounds of Cooperative Forecasts, 1976 - 2022

Round 1 - 1976	Round 7.0 – 2005
Round 2 - 1979	Round 7.0a – 2006
Round 3 - 1983	Round 7.1 – 2008
Round 3.5 – 1985	Round 7.2 – July 2009
Round 4 – 1987	Round 7.2A – October 2009
Round 4-1 – 1991	Round 8.0 – 2010
Round 5 – January 1994	Round 8.0a – 2011
Round 5.1 – May 1994	Round 8.1 – 2012
Round 5.2 - 1995	Round 8.2 – 2013
Round 5.3 – 1996	Round 8.3 – 2014
Round 5.4 – 1997	Round 8.4 – 2015
Round 6a – 1998	Round 9.0 - 2016
Round 6.1 – 1999	Round 9.1 - 2018
Round 6.2 – 2000	Round 9.1a - 2020
Round 6.3 – 2003	Round 9.2 - 2021
Round 6.4A – 2004	

Important Notes

In reviewing the Round 7.0 forecasts in 2005, the PDTAC and the Metropolitan Development Policy Committee (MDPC) determined that local plans and zoning in the metropolitan Washington region do not currently provide the housing necessary for workers to fill the forecasted jobs. Previously, forecasts adopted by the COG Board were based on local plans and zoning capacities as provided for in adopted land use plans. In approving Round 7.0, the COG Board concluded that certain localities would need to re-plan and re-zone land to provide sufficient housing to meet employment projections. This assumption is still implicit in the Round 9.2 Forecasts.

For the Round 8.0 Cooperative Forecasts, COG partnered with the George Mason University Center for Regional Analysis (CRA) for the development of new regional benchmark totals. With the guidance of COG staff and the CRA, the regional benchmark totals were developed using the econometric modeling forecasts from Global Insight, Inc. for the metropolitan Washington region. The PDTAC was briefed on the development of the benchmark totals methodology and gave their final approval of the benchmark totals at the June 2009 committee meeting.

Results of the Round 8.2 Cooperative Forecasts started to show a divergence from the Round 8.0 regional benchmark totals and starting in 2013, the Cooperative Forecasting and Data Subcommittee began the work to re-examine the economic outlook of the region. A data product from Global Insight, Inc. was examined in anticipation of developing a new regional benchmark total.

For Round 9.2, 2015 was the base year for the employment, population, and households forecast series, again indexed to Global Insight projections for the region. Jurisdictional submissions were provided to COG

staff during the September/October 2020 timeframe with TAZ level submissions in December 2020 and January 2021. The initial Census results, the Decennial Census P.L. 94-171 Redistricting Data, were delayed and were not released until August 2021 and therefore are not included in Round 9.2 Cooperative Forecasts.

ECONOMETRIC MODEL

Employment

The Round 9.0 econometric model projections reveal significant increases in employment, households, and population through 2045, the end of the forecast period.

Employment in the region will reach 4.2 million jobs by 2045. The region will add 1.0 million jobs or a 32 percent increase to an existing 2015 base of 3.1 million jobs.

Figure 2: Historic and Forecast Employment, 1990 to 2045
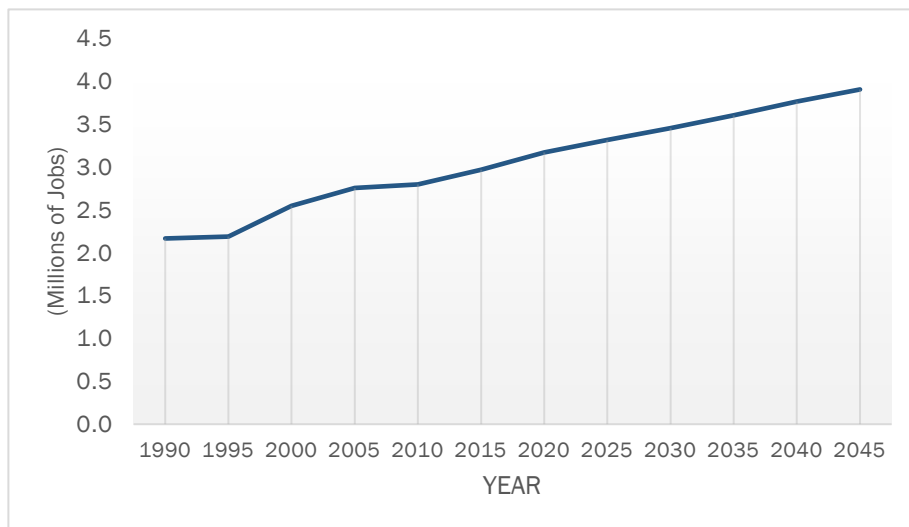
Figure 3: Forecast Job Growth by 5-Year Increment
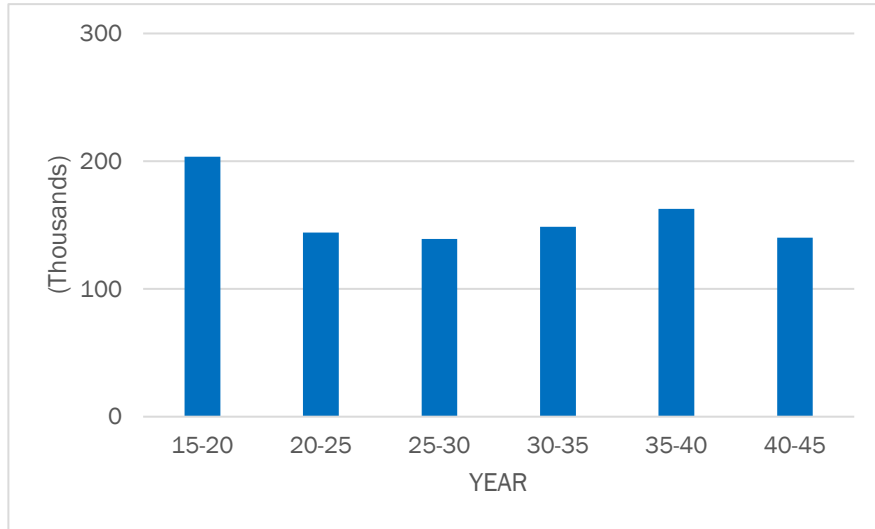
Table 2: Round 9.0 Econometric Model Results – Employment (Thousands)

	2015	2020	2025	2030	2035	2040	2045
Construction, Natural Resources, and Mining	139.1	180.8	192.9	200.8	207.4	218.7	230.8
Manufacturing	42.5	43.2	42.4	41.4	40.6	40.1	39.2
Transportation, Trade, & Utilities	369.1	377.1	377.9	377.8	379.3	377.6	375.1
Information	75.0	83.5	94.6	101.5	109.8	115.6	124.1
Financial Activities	139.6	137.0	137.3	138.6	142.4	145.3	148.3
Professional & Business Services	704.0	816.1	912.5	1,007.5	1,104.1	1,214.9	1,306.2
Educational & Health Services	385.8	406.5	418.6	428.0	443.3	456.8	468.5
Leisure & Hospitality	276.8	294.6	297.0	300.2	309.1	319.4	327.3
Other Services	185.5	183.6	185.8	191.3	192.9	195.8	200.2
Government	652.2	650.8	658.3	669.4	676.3	683.7	688.2
Federal Government	354.8	336.8	327.1	324.9	318.7	316.2	310.6
State & Local Government	297.4	313.9	331.2	344.5	357.6	367.4	377.6
Total Nonfarm	**2,969.7**	**3,173.1**	**3,317.3**	**3,456.4**	**3,605.2**	**3,767.9**	**3,907.8**
CES Correction	**2,956.0**	**3,189.0**	**3,333.9**	**3,473.7**	**3,623.2**	**3,786.7**	**3,927.4**
Military	**42.4**	**42.4**	**42.4**	**42.4**	**42.4**	**42.4**	**42.4**
Self-Employed	**147.8**	**159.4**	**166.7**	**173.7**	**181.2**	**189.3**	**196.4**
Total Employment	**3,146.2**	**3,390.8**	**3,542.9**	**3,689.8**	**3,846.8**	**4,018.4**	**4,166.2**

Figure 4: Comparison of 2015 and 2045 of North American Industry Classification System (NAICS) Industry Shares of Employment

3.0 Million Jobs

1%
5%
3%
5%
6%
9%
10%
12%
12%
13%
24%

2015

3.9 Million Jobs

1%
4%
3%
6%
5%
8%
8%
10%
10%
12%
33%

2045

Manufacturing

Information

Construction, Natural Resources, and Mining

Financial Activities

Other Services

Leisure & Hospitality

State & Local Government

Federal Government

Educational & Health Services

Transportation, Trade, & Utilities

Professional & Business Services
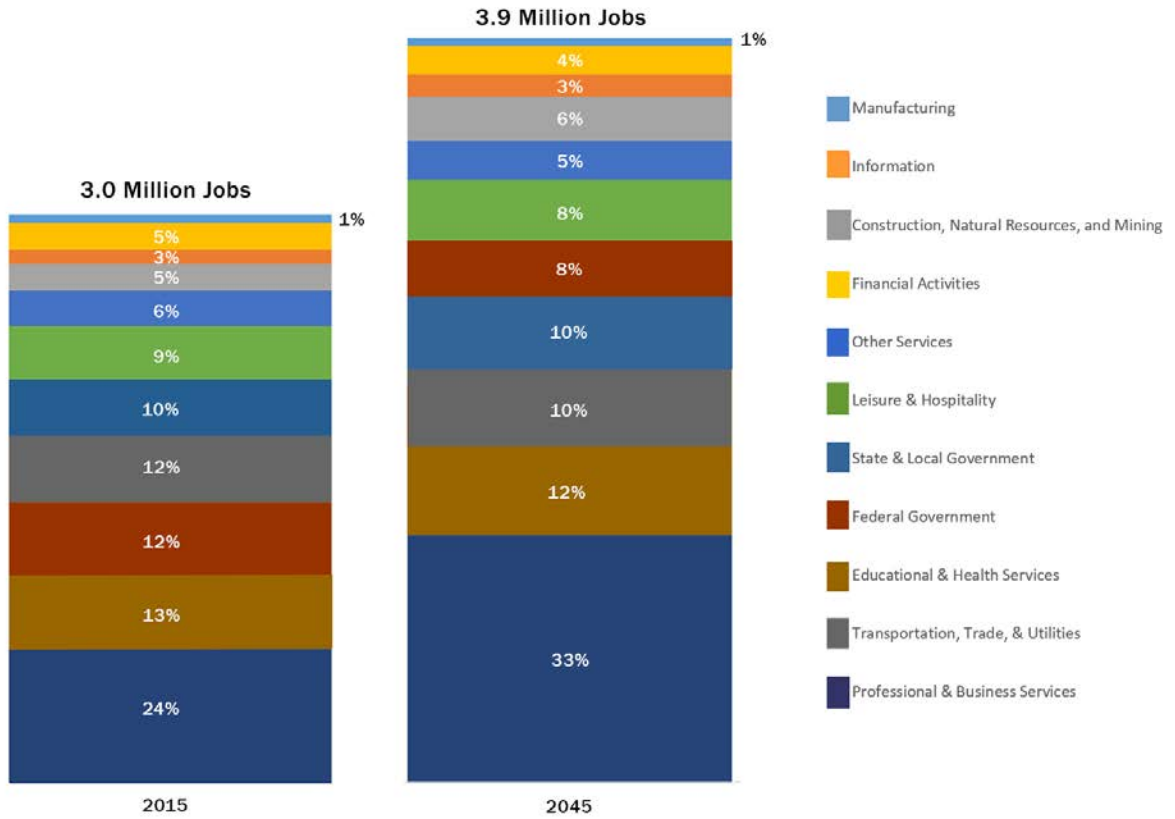
Population and Households

Population in the region will reach nearly 6.9 million people by 2045. The region will add 1.4 million people to an existing 2015 total of 5.5 million people, or a 26 percent increase.

The region will have 2.8 million households by 2045; an additional 766,000 households to an existing 2015 total of 2.0 million households, or a 38 percent increase.

Table 3: Round 9.0 Econometric Model Results – Total Population and Heads of Households (Thousands)

	2015	2020	2025	2030	2035	2040	2045
Total Population	5,486.5	5,793.6	6,043.6	6,274.3	6,488.7	6,686.6	6,888.4
Heads of Households	2,009.4	2,146.2	2,276.2	2,400.2	2,519.6	2,642.7	2,775.4

Figure 5: Historic and Forecast Population, 1990 to 2045

Figure 6: Share of 2015 to 2045 Population Growth by Age Group

Age 0 thru 14, 14%
Age 15 thru 24, 10%,
Age 25 thru 34, 11%
Age 35 thru 44, 16%
Age 45 thru 54, 11%
Age 55 thru...
Age 65 and Older, 31%

JURISDICTIONAL FORECASTS

Employment

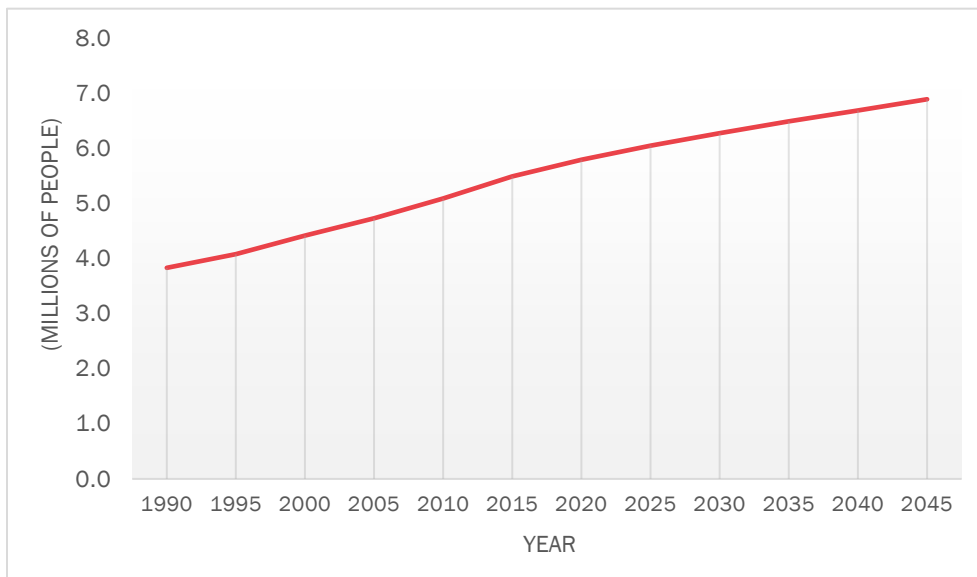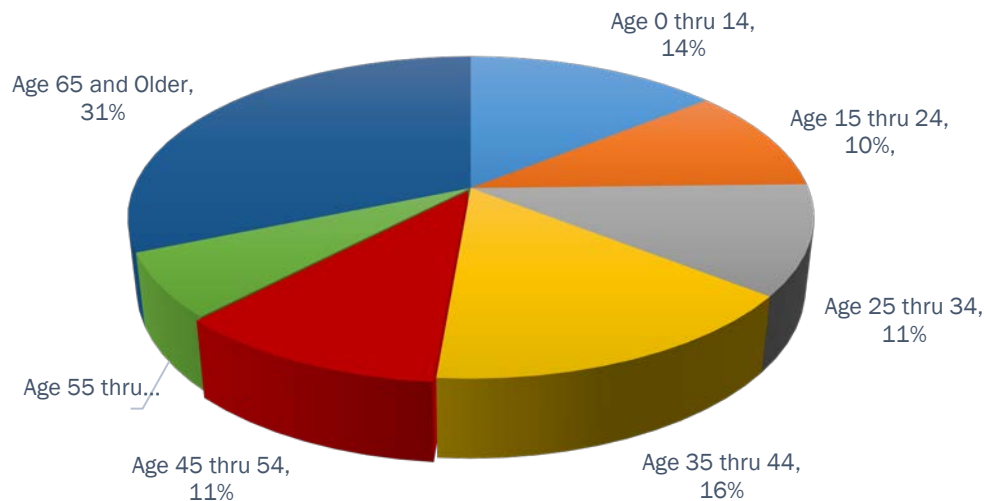Job growth in Northern Virginia (42 percent) will outpace the growth anticipated in Maryland jurisdictions (21 percent), and the District of Columbia (18 percent). The District of Columbia, Fairfax County, and Montgomery County will add the largest number of new jobs to the region's employment base during the 2020 to 2045 forecast period, followed by Prince William and Loudoun counties.

Collectively, the region's inner suburbs will add the largest number of new jobs, 384,500 by 2045. As with population and household growth, the largest percentage increases in employment will occur in the outer suburbs of Virginia and Maryland. Together, these outer jurisdictions will add 210,400 jobs to the region's base, increasing their total number of jobs 19 percent by 2045. Despite the tremendous growth in suburban employment shown in the forecasts, the District of Columbia will continue to have largest number of jobs of any single jurisdiction and would account for about a fifth of the region's employment in 2045. Collectively, the central jurisdictions will account for 26 percent of regional employment.

Table 4: Summary of Employment Forecasts Round 9.2 Cooperative Forecasts (Thousands)

JURISDICTION	Round 9.2 Base Year 2015	2020	2025	2030	2035	2040	2045	2020 to 2045 Growth Number	% Change	Share
District of Columbia	798.3	846.3	895.1	937.9	978.2	1,011.8	1,045.4	199.1	23.5%	22.6%
Arlington County	209.1	229.4	240.1	258.1	280.1	287.5	290.8	61.5	26.8%	7.0%
City of Alexandria	106.0	107.3	116.2	117.4	122.1	128.4	132.4	25.1	23.4%	2.9%
Central Jurisdictions	**1,113.4**	**1,182.9**	**1,251.5**	**1,313.4**	**1,380.4**	**1,427.7**	**1,468.6**	**285.7**	**24.1%**	**32.4%**
Montgomery County	520.2	543.5	572.5	604.5	627.4	653.9	678.8	135.3	24.9%	15.4%
City of Rockville (1)	76.9	78.4	80.4	82.4	86.6	90.9	96.4	18.0	23.0%	2.0%
City of Gaithersburg (1)	46.4	47.6	50.0	52.7	56.1	61.1	65.7	18.1	38.1%	2.1%
Prince George's County	338.6	349.0	366.3	375.7	385.5	393.3	402.1	53.1	15.2%	6.0%
Fairfax County	654.1	700.9	748.6	793.2	827.7	864.8	890.6	189.7	27.1%	21.5%
City of Fairfax	22.8	22.9	23.0	23.1	23.2	23.3	23.4	0.5	2.2%	0.1%
City of Falls Church	13.5	13.7	14.4	16.7	17.8	18.7	19.6	5.9	43.0%	0.7%
Inner Suburbs	**1,549.2**	**1,630.0**	**1,724.9**	**1,813.2**	**1,881.5**	**1,954.0**	**2,014.4**	**384.5**	**23.6%**	**43.7%**
Loudoun County	167.1	190.7	205.0	224.4	240.0	252.5	260.9	70.2	36.8%	8.0%
Prince William County	143.0	164.8	184.4	203.8	222.5	240.9	257.0	92.2	56.0%	10.5%
City of Manassas	25.7	26.5	28.0	29.4	30.0	30.6	31.2	4.7	17.9%	0.5%
City of Manassas Park	4.6	4.7	4.8	4.9	5.0	5.1	5.2	0.5	10.3%	0.1%
Charles County	46.6	47.0	49.2	52.2	55.4	58.8	61.5	14.5	30.9%	1.6%
Frederick County	111.8	117.3	123.2	128.6	135.3	141.1	145.5	28.2	24.1%	3.2%
City of Frederick (2)	50.7	52.4	54.2	56.1	58.0	60.0	62.0	9.6	18.3%	1.1%
Outer Suburbs	**499.0**	**551.0**	**594.6**	**643.4**	**688.2**	**728.9**	**761.4**	**210.4**	**38.2%**	**23.9%**
Virginia Jurisdictions	**1,346.1**	**1,460.9**	**1,564.7**	**1,671.0**	**1,768.3**	**1,851.8**	**1,911.2**	**450.3**	**30.8%**	**51.1%**
Maryland Jurisdictions	**1,017.2**	**1,056.8**	**1,111.2**	**1,161.1**	**1,203.6**	**1,247.0**	**1,287.9**	**231.1**	**21.9%**	**26.2%**
COG REGION	**3,161.5**	**3,364.0**	**3,571.0**	**3,770.0**	**3,950.2**	**4,110.6**	**4,244.5**	**880.5**	**26.2%**	**100.0%**

(1) Included in the Montgomery County total.
(2) Included in the Frederick County total.

Figure 7: Employment Growth by Jurisdiction, 2020 to 2045 (Thousands)

Jurisdiction	2020 to 2045 Growth	2020 Employment
District of Columbia	199.1	846.3
Arlington County	61.5	229.4
City of Alexandria	25.1	107.3
Montgomery County	135.3	543.5
City of Rockville	18.0	78.4
City of Gaithersburg	18.1	47.6
Prince George's County	53.1	349.0
Fairfax County	189.7	700.9
City of Fairfax	0.5	22.9
City of Falls Church	5.9	13.7
Loudoun County	70.2	190.7
Prince William County	92.2	164.8
City of Manassas	4.7	26.5
City of Manassas Park	0.5	4.7
Charles County	14.5	47.0
Frederick County	28.2	117.3
City of Frederick	9.6	52.4

Figure 8: Percent Change in Employment by Jurisdiction, 2020 to 2045

Jurisdiction	Percent Change
District of Columbia	24%
Arlington County	27%
City of Alexandria	23%
Montgomery County	25%
City of Rockville	23%
City of Gaithersburg	38%
Prince George's County	15%
Fairfax County	27%
City of Fairfax	2%
City of Falls Church	43%
Loudoun County	37%
Prince William County	56%
City of Manassas	18%
City of Manassas Park	10%
Charles County	31%
Frederick County	24%
City of Frederick	18%

Figure 9: 2020 Employment and Projected Employment to 2045

Note: One dot represents 500 jobs. Light red dots indicate 2020 employment, dark red dots indicate 2020 to 2045 employment growth
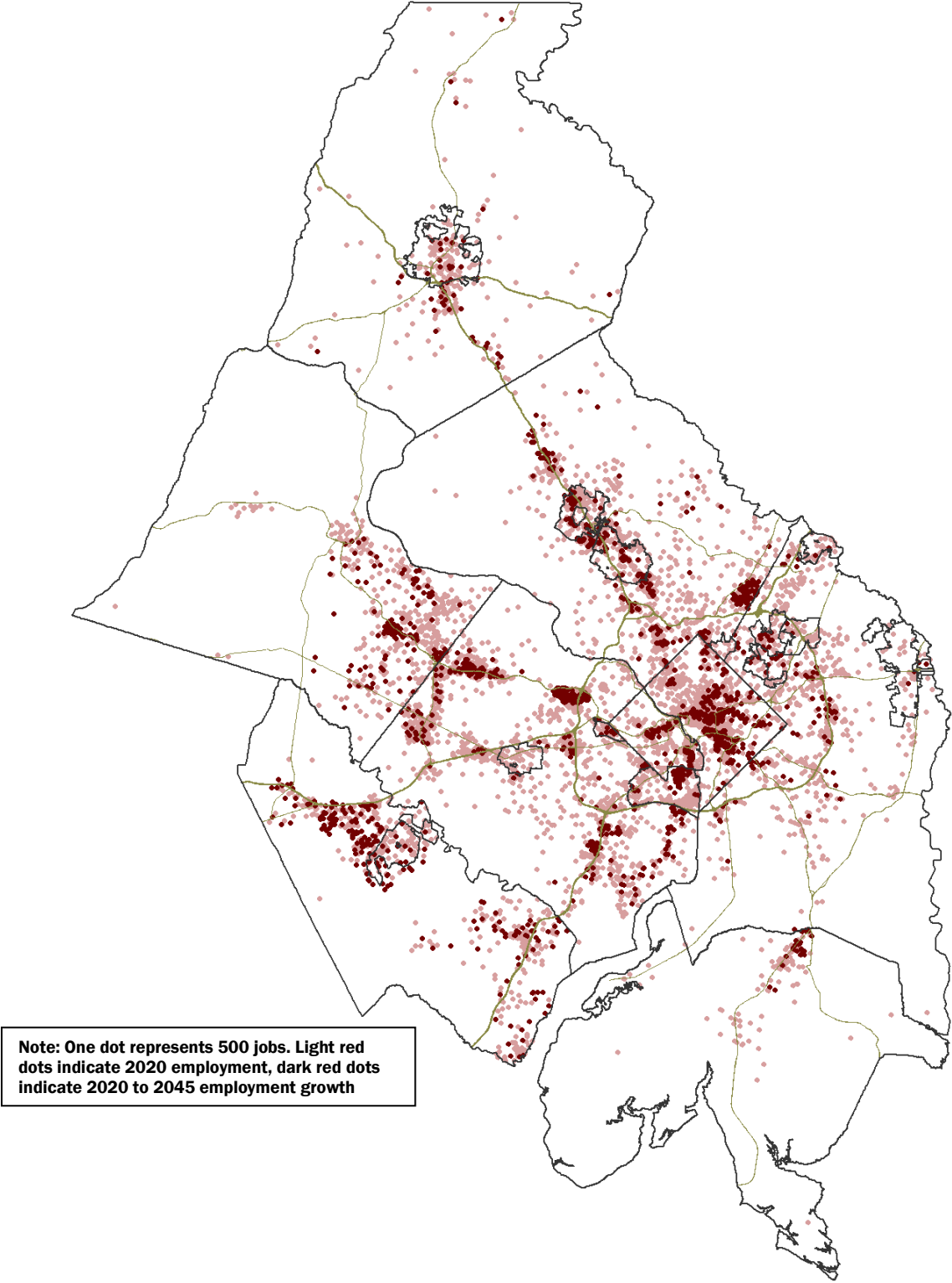
Households

The addition of more than 535,600 households during the 2020 to 2045 forecast period reflects the growth in jobs and in-migration to the region. The largest number of new households will be in Fairfax County, the District of Columbia, and Montgomery County, which collectively contribute more than half of the household growth during the forecast period. Charles County will grow at a rate of 53 percent, the most rapidly of all jurisdictions, adding about 31,900 households to the 2020 total of 60,300.

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 jurisdiction's households.

Table 5: Summary of Household Forecasts Round 9.2 Cooperative Forecasts (Thousands)

JURISDICTION	Round 9.2 Base Year 2015	2020	2025	2030	2035	2040	2045	2020 to 2045 Growth Number	% Change	Share
District of Columbia	297.1	319.3	341.0	362.5	380.6	396.2	411.9	92.6	29.0%	17.3%
Arlington County	103.2	109.2	117.9	123.8	129.7	135.8	141.4	32.2	29.4%	6.0%
City of Alexandria	71.2	75.7	82.7	88.2	92.6	97.1	103.7	28.0	37.0%	5.2%
Central Jurisdictions	**471.5**	**504.2**	**541.6**	**574.6**	**602.9**	**629.1**	**656.9**	**152.7**	**30.3%**	**28.5%**
Montgomery County	374.9	391.2	405.7	422.3	438.1	450.9	461.9	70.8	18.1%	13.2%
City of Rockville (1)	26.4	28.8	31.1	33.5	35.2	37.4	39.4	10.6	36.6%	2.0%
City of Gaithersburg (1)	24.7	26.0	27.5	28.9	30.5	32.1	33.4	7.4	28.3%	1.4%
Prince George's County	321.1	334.3	343.9	355.5	363.3	370.0	376.8	42.5	12.7%	7.9%
Fairfax County	403.9	418.1	433.5	454.9	479.9	503.0	521.7	103.6	24.8%	19.3%
City of Fairfax	8.9	9.6	11.1	12.1	12.5	13.0	13.5	3.9	40.2%	0.7%
City of Falls Church	5.8	7.0	8.7	10.1	11.0	11.7	12.4	5.4	77.0%	1.0%
Inner Suburbs	**1,114.6**	**1,160.1**	**1,202.8**	**1,254.9**	**1,304.8**	**1,348.6**	**1,386.3**	**226.2**	**19.5%**	**42.2%**
Loudoun County	121.1	137.6	151.7	165.5	172.1	177.0	180.5	42.9	31.2%	8.0%
Prince William County	142.9	151.0	167.1	176.9	185.2	191.8	197.1	46.1	30.5%	8.6%
City of Manassas	12.7	13.1	13.9	14.3	14.7	15.0	15.3	2.2	17.1%	0.4%
City of Manassas Park	4.5	5.0	5.0	5.0	5.0	5.0	5.0	0.0	0.0%	0.0%
Charles County	53.7	60.3	65.5	72.9	78.6	83.4	92.2	31.9	52.8%	5.9%
Frederick County	89.9	98.4	106.3	115.4	122.4	128.1	132.1	33.7	34.2%	6.3%
City of Frederick (2)	27.3	28.6	29.1	32.0	34.2	36.2	38.0	9.4	32.7%	1.7%
Outer Suburbs	**424.9**	**465.5**	**509.4**	**550.0**	**578.0**	**600.4**	**622.2**	**156.7**	**33.7%**	**29.3%**
Virginia Jurisdictions	**874.3**	**926.4**	**991.5**	**1,050.8**	**1,102.8**	**1,149.4**	**1,190.6**	**264.2**	**28.5%**	**49.3%**
Maryland Jurisdictions	**839.6**	**884.1**	**921.3**	**966.1**	**1,002.4**	**1,032.4**	**1,062.9**	**178.8**	**20.2%**	**33.4%**
COG REGION	**2,011.1**	**2,129.8**	**2,253.8**	**2,379.5**	**2,485.8**	**2,578.1**	**2,665.4**	**535.6**	**25.1%**	**100.0%**

(1)   Included in the Montgomery County total.
(2)   Included in the Frederick County total.

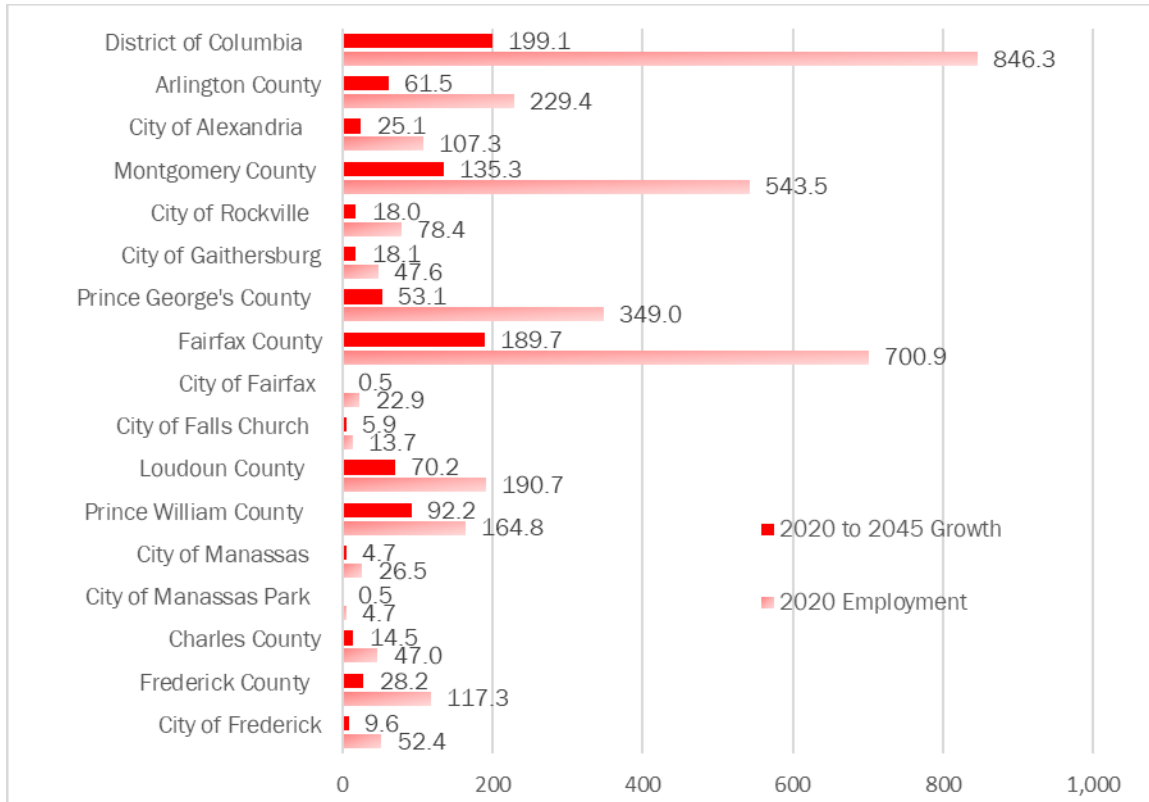**Figure 10: Household Growth by Jurisdiction, 2020 to 2045 (Thousands)**

Figure 11: Percent Change in Households by Jurisdiction, 2020 to 2045

Figure 12: 2020 Households and Projected Households to 2045

Note: One dot represents 500 households. Light blue dots indicate 2020 households, dark blue dots indicate 2020 to 2045 household growth

Population

The region's population is expected to grow steadily through the forecast period, adding an average of approximately 51,400 persons a year. Population will be spurred by the long-term strength of the region's economy, high rate of in-migration and international immigration, and possible decline in average household size.

Most of the population growth will be in the District of Columbia, Fairfax, and Montgomery counties. The outer jurisdictions will experience the fastest rates of growth, led by Charles County (42 percent), Frederick County (31 percent), and Loudoun County (30 percent). The region's central jurisdictions will also grow. In the District of Columbia, population will increase by 35 percent during the forecast period. In the City of Alexandria and Arlington County, population will increase by 37 and 30 percent, respectively.

Table 6: Summary of Population Forecasts Round 9.2 Cooperative Forecasts (Thousands)

JURISDICTION	Round 9.2 Base Year 2015	2020	2025	2030	2035	2040	2045	2020 to 2045 Growth Number	% Change	Share
District of Columbia	672.2	729.5	787.0	842.1	893.9	940.7	987.2	257.7	35.3%	20.1%
Arlington County	219.1	231.2	249.2	261.6	273.9	287.2	299.5	68.3	29.5%	5.3%
City of Alexandria	147.8	169.5	185.5	197.7	207.4	217.3	231.8	62.3	36.7%	4.9%
Central Jurisdictions	**1,039.2**	**1,130.3**	**1,221.8**	**1,301.4**	**1,375.2**	**1,445.2**	**1,518.5**	**388.3**	**34.4%**	**30.2%**
Montgomery County	1,015.3	1,052.0	1,087.3	1,128.8	1,167.7	1,197.1	1,223.3	171.4	16.3%	13.3%
City of Rockville (1)	66.3	72.2	78.2	83.3	86.7	91.8	96.1	23.9	33.0%	1.9%
City of Gaithersburg (1)	67.1	70.7	74.6	78.7	82.4	86.1	89.3	18.6	26.3%	1.4%
Prince George's County	904.4	923.1	938.0	953.0	967.8	982.8	995.9	72.7	7.9%	5.7%
Fairfax County	1,125.4	1,172.4	1,207.8	1,255.7	1,312.0	1,363.8	1,405.9	233.5	19.9%	18.2%
City of Fairfax	24.1	25.6	29.2	31.6	32.7	33.9	35.2	9.6	37.4%	0.7%
City of Falls Church	13.6	15.6	18.4	20.8	22.3	23.4	24.5	8.9	57.0%	0.7%
Inner Suburbs	**3,082.8**	**3,188.7**	**3,280.7**	**3,389.8**	**3,502.6**	**3,601.1**	**3,684.8**	**496.1**	**15.6%**	**38.6%**
Loudoun County	368.7	423.0	466.9	508.4	526.5	539.2	548.2	125.2	29.6%	9.8%
Prince William County	444.8	468.4	504.2	530.3	551.6	569.2	582.7	114.4	24.4%	8.9%
City of Manassas	41.5	42.6	45.3	46.7	48.1	49.2	50.3	7.7	18.2%	0.6%
City of Manassas Park	14.3	15.9	15.9	15.9	15.9	15.9	15.9	0.0	0.0%	0.0%
Charles County	150.8	167.0	178.2	194.7	207.5	218.6	236.5	69.4	41.6%	5.4%
Frederick County	246.5	263.9	284.3	304.5	320.2	334.6	346.6	82.7	31.3%	6.4%
City of Frederick (2)	70.4	73.6	77.5	82.1	86.9	91.7	96.2	22.6	30.7%	1.8%
Outer Suburbs	**1,266.5**	**1,380.8**	**1,494.7**	**1,600.3**	**1,669.8**	**1,726.6**	**1,780.3**	**399.4**	**28.9%**	**31.1%**
Virginia Jurisdictions	**2,399.2**	**2,564.2**	**2,722.3**	**2,868.7**	**2,990.4**	**3,099.2**	**3,194.0**	**629.8**	**24.6%**	**49.1%**
Maryland Jurisdictions	**2,317.0**	**2,406.1**	**2,487.8**	**2,580.9**	**2,663.3**	**2,733.0**	**2,802.3**	**396.2**	**16.5%**	**30.9%**
COG REGION	**5,388.4**	**5,699.8**	**5,997.2**	**6,291.6**	**6,547.6**	**6,772.9**	**6,983.5**	**1,283.8**	**22.5%**	**100.0%**

(1) Included in the Montgomery County total.
(2) Included in the Frederick County total.

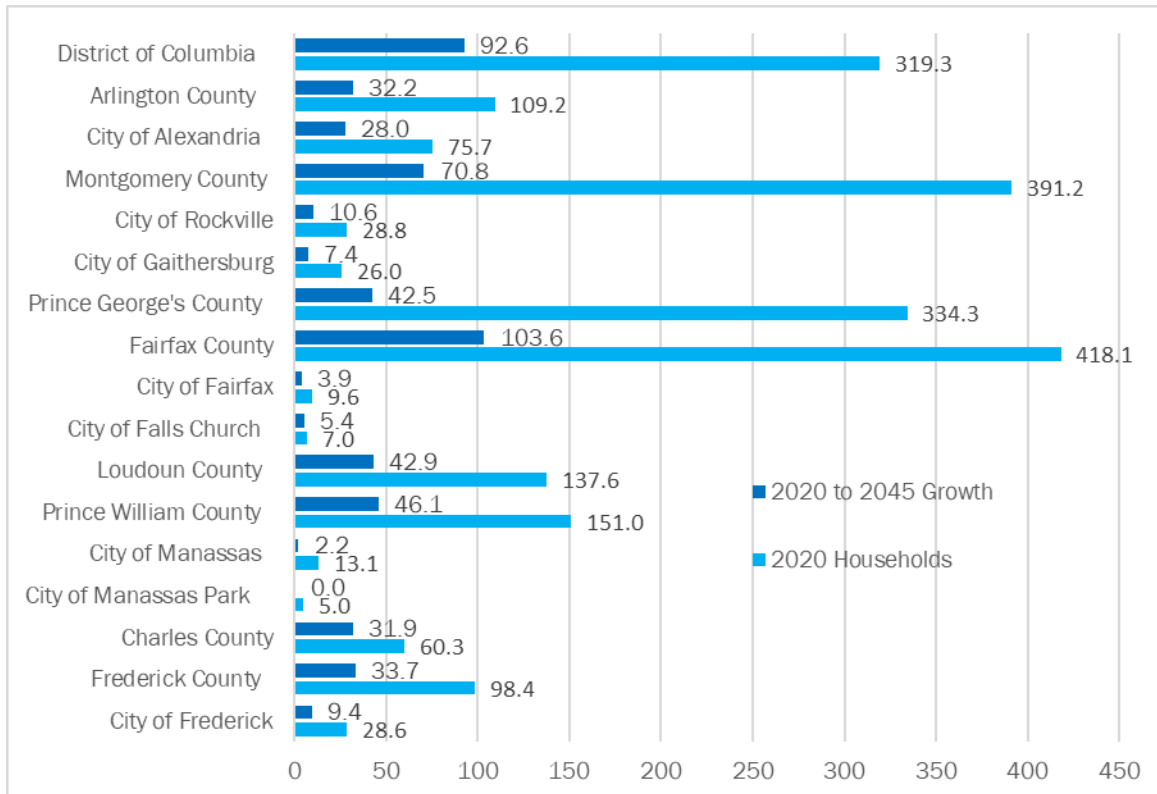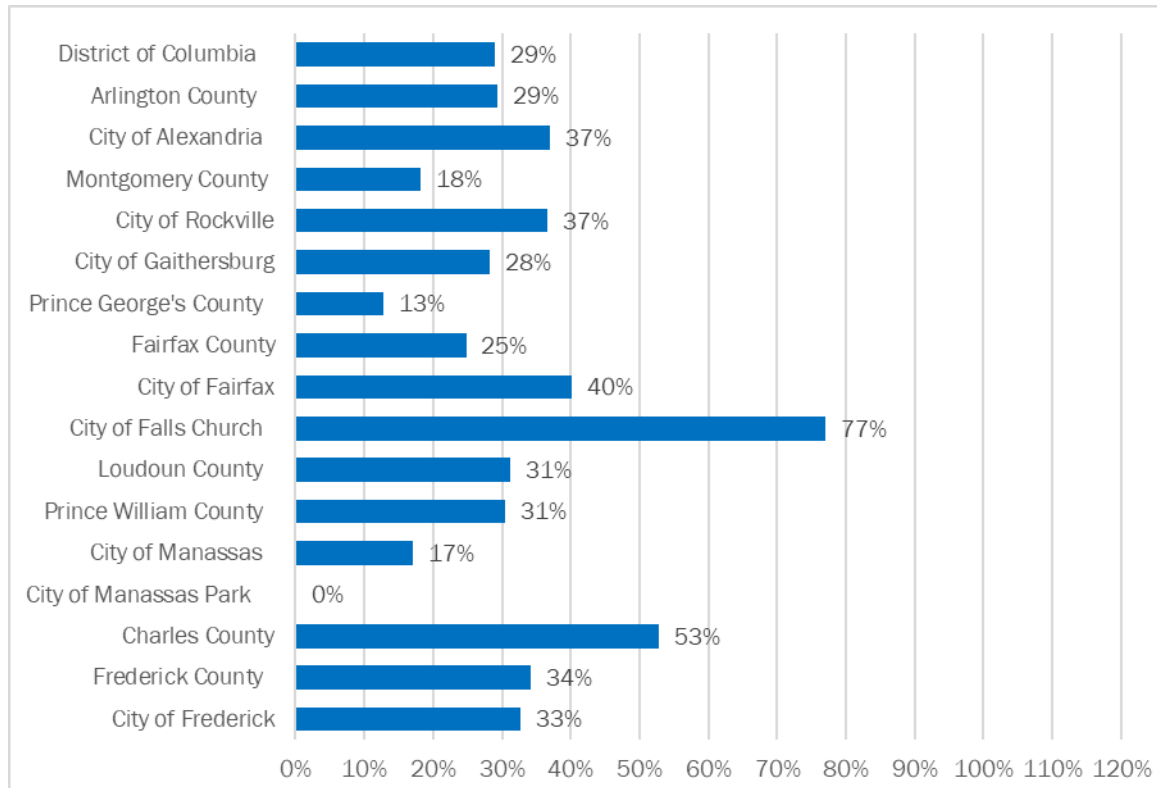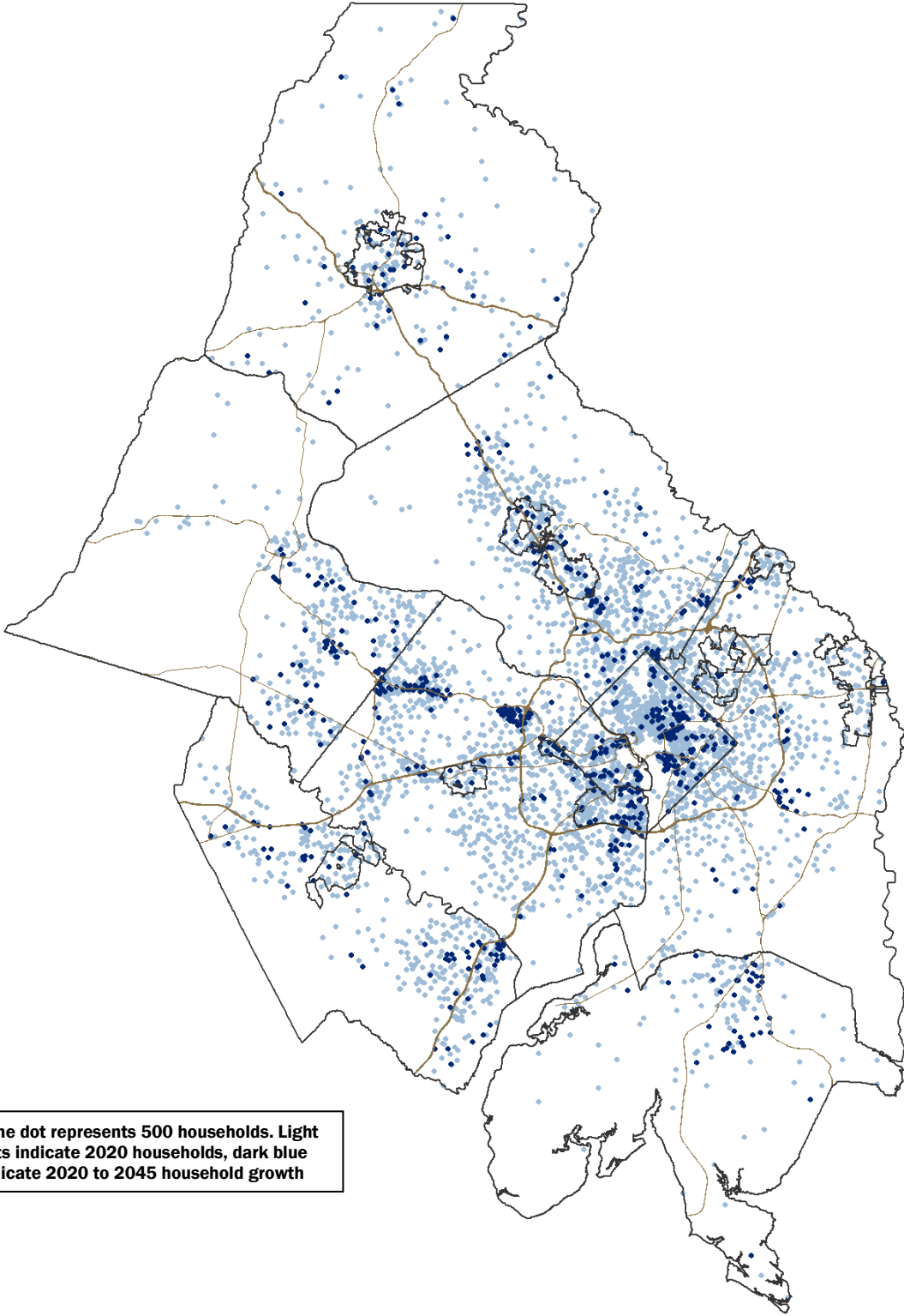**Figure 13: Population Growth by Jurisdiction, 2020 to 2045 (Thousands)**

Jurisdiction	2020 to 2045 Growth	2020 Population
District of Columbia	257.7	729.5
Arlington County	68.3	231.2
City of Alexandria	62.3	169.5
Montgomery County	171.4	1,052.0
City of Rockville	23.9	72.2
City of Gaithersburg	18.6	70.7
Prince George's County	72.7	923.1
Fairfax County	233.5	1,172.4
City of Fairfax	9.6	25.6
City of Falls Church	8.9	15.6
Loudoun County	125.2	423.0
Prince William County	114.4	468.4
City of Manassas	7.7	42.6
City of Manassas Park	0.0	15.9
Charles County	69.4	167.0
Frederick County	82.7	263.9
City of Frederick	22.6	73.6

Figure 14: Percent Change in Population Growth by Jurisdiction, 2020 to 2045

Jurisdiction	Percent Change
District of Columbia	35%
Arlington County	30%
City of Alexandria	37%
Montgomery County	16%
City of Rockville	33%
City of Gaithersburg	26%
Prince George's County	8%
Fairfax County	20%
City of Fairfax	37%
City of Falls Church	57%
Loudoun County	30%
Prince William County	24%
City of Manassas	18%
City of Manassas Park	0%
Charles County	42%
Frederick County	31%
City of Frederick	31%
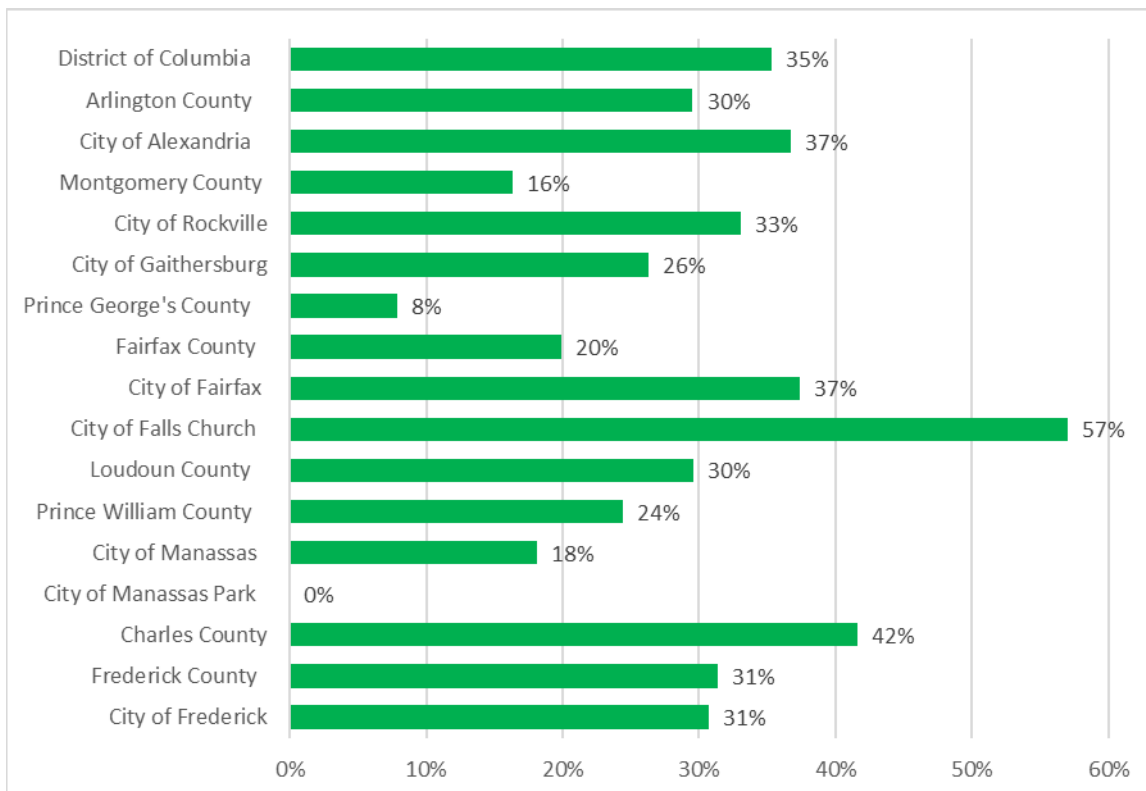
Figure 15: 2020 Population and Projected Population to 2045

Note: One dot represents 500 people. Light green dots indicate 2020 population, dark green dots indicate 2020 to 2045 population growth
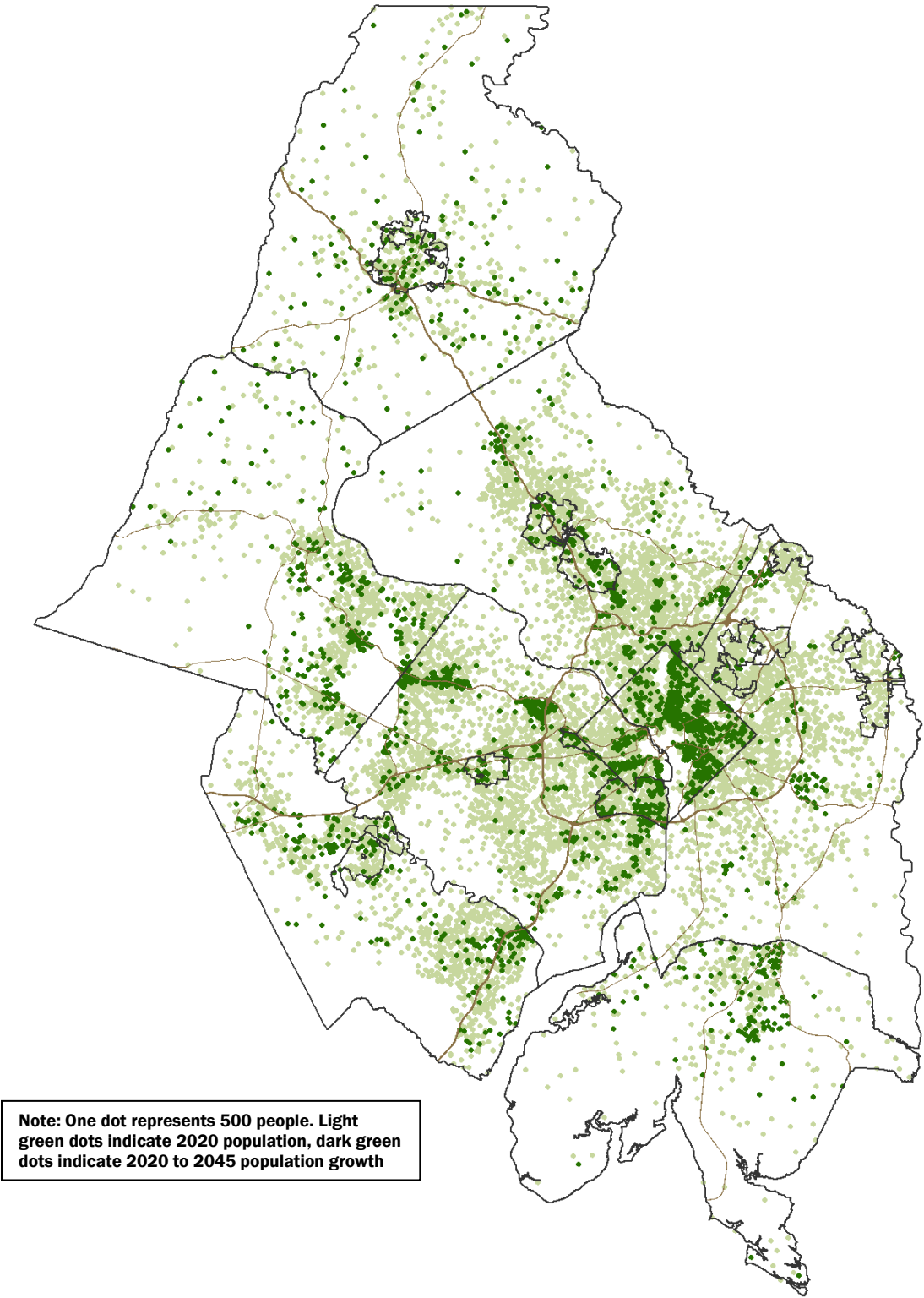
REGIONAL ACTIVITY CENTERS

In 2012, COG worked with local planning officials to carry out an extensive redesign of the regional Activity Centers map. The new map was approved by the COG Board of Directors in 2013 and reflects 141 Activity Centers that include urbanized places to traditional downtowns.

The Region Forward Coalition established a target for the region to capture 75 percent of the square footage of new commercial construction and 50 percent of new households in Regional Activity Centers. Based on the new Round 9.2 Cooperative Forecasts, in 2020, 66 percent of the region's jobs were located in Regional Activity Centers. During the 2020 and 2045 forecast period, 74 percent of job growth will be concentrated in Activity Centers. The highest percentage of jobs located in Regional Activity Centers in 2045 will be found in the Central Jurisdictions: District of Columbia (88 percent), City of Alexandria (74 percent), and Arlington County (85 percent).

Households in Regional Activity Centers accounted for 33 percent of the region's total households in 2020. From 2020 to 2045, 62 percent of the household growth is projected to occur in Regional Activity Centers. In 2045, jurisdictions having the highest share of households located in Regional Activity Centers will be in the Central Jurisdictions: City of Alexandria (62 percent), District of Columbia (69 percent), and Arlington County (67 percent).

Map of Regional Activity Centers

Dot indicates the location of each Activity Center
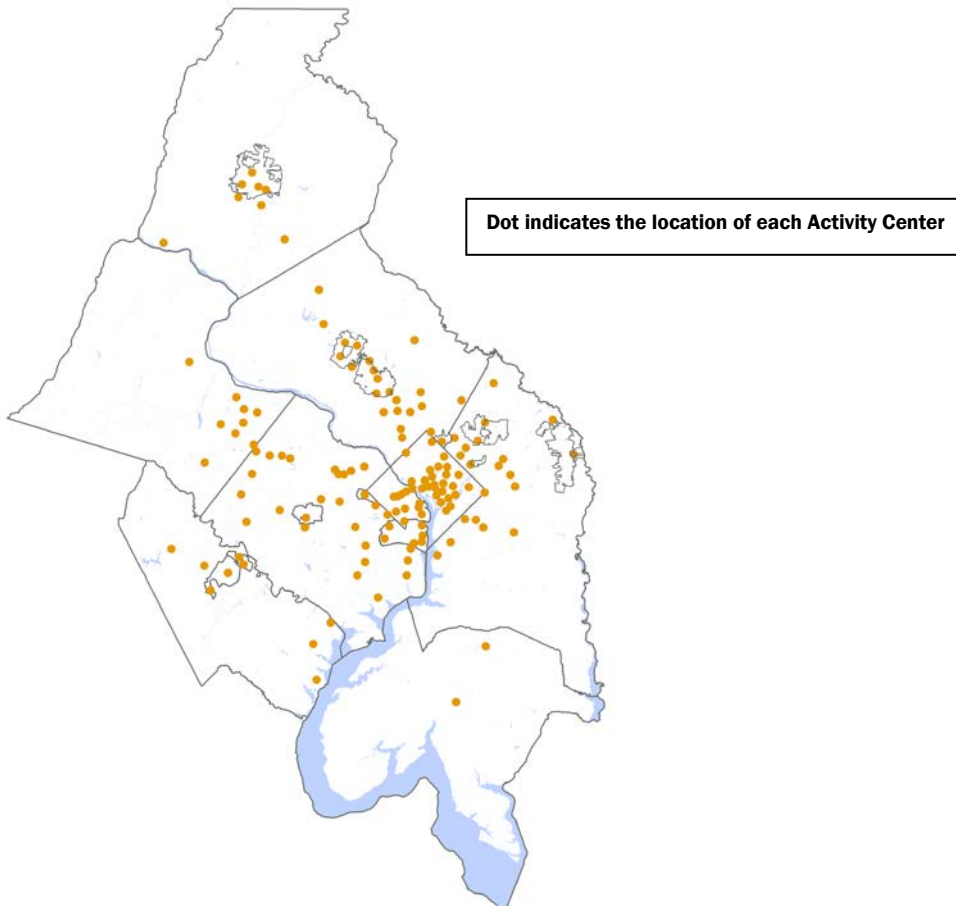
Figure 16: Round 9.2 Share of Employment in Activity Centers by Jurisdiction in 2020

Jurisdiction	Inside of Activity Center	Outside of Activity Center
Arlington County	82%	18%
Charles County	45%	55%
City of Alexandria	90%	10%
District of Columbia	88%	12%
Fairfax / City / Falls Church	72%	28%
Frederick County	59%	41%
Loudoun County	37%	63%
Montgomery County	59%	41%
Prince George's County	29%	71%
Prince William / Manassas / Manassas Park	35%	65%
COG Region	66%	34%
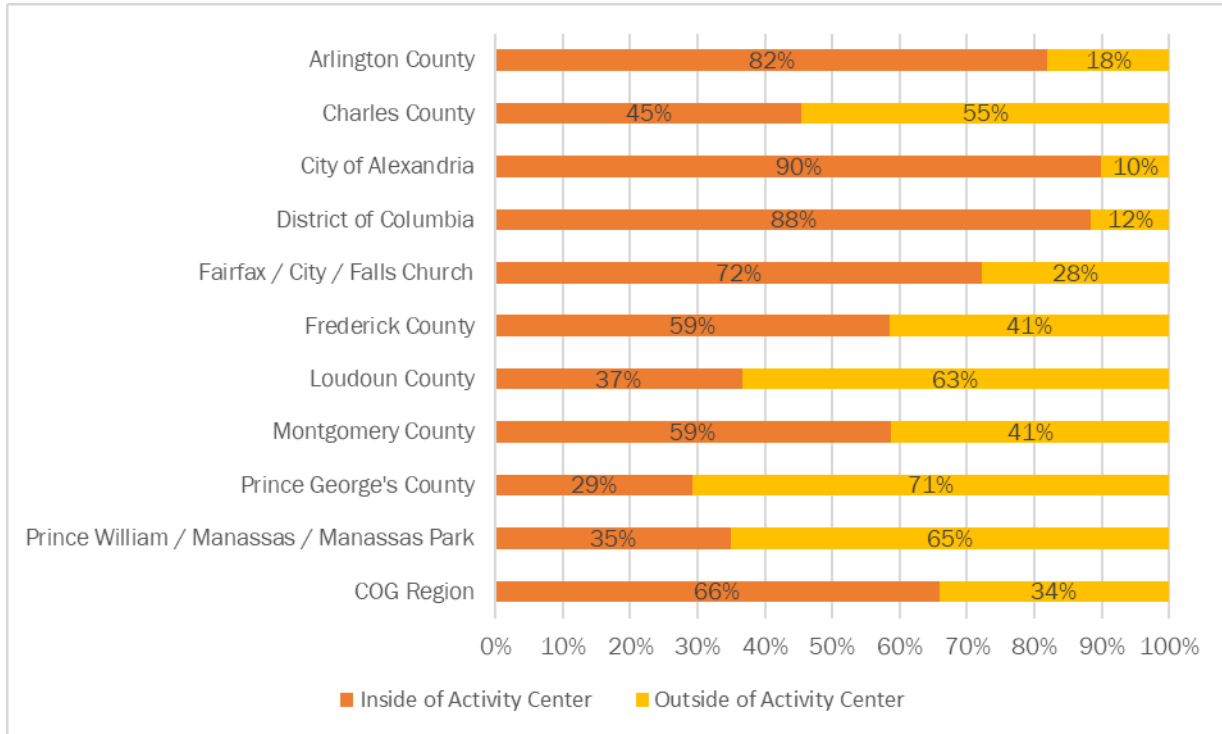
Figure 17: Round 9.2 Share of Employment in Activity Centers by Jurisdiction in 2045

Jurisdiction	Inside of Activity Center	Outside of Activity Center
Arlington County	85%	15%
Charles County	43%	57%
City of Alexandria	74%	26%
District of Columbia	88%	12%
Fairfax / City / Falls Church	75%	25%
Frederick County	60%	40%
Loudoun County	44%	56%
Montgomery County	63%	37%
Prince George's County	33%	67%
Prince William / Manassas / Manassas Park	33%	67%
COG Region	67%	33%
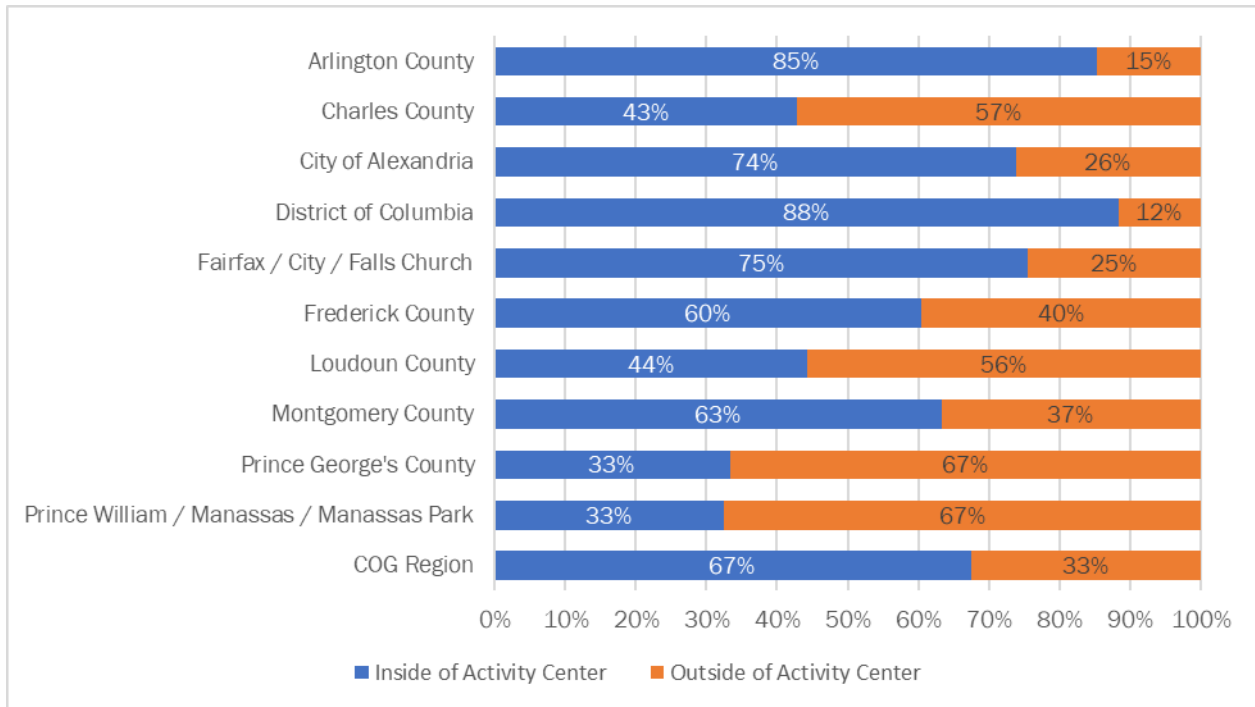
Figure 18: Round 9.2 Employment Growth Between 2020 and 2045 Occurring in Regional Activity Centers

Arlington County: 98% | 2%
Charles County: 34% | 66%
City of Alexandria: 5% | 95%
District of Columbia: 88% | 12%
Fairfax / City / Falls Church: 88% | 12%
Frederick County: 68% | 32%
Loudoun County: 65% | 35%
Montgomery County: 82% | 18%
Prince George's County: 60% | 40%
Prince William / Manassas / Manassas Park: 27% | 73%
COG Region: 74% | 26%

■ Employment Growth in Activity Centers   ■ Employment Growth Outside of Activity Centers
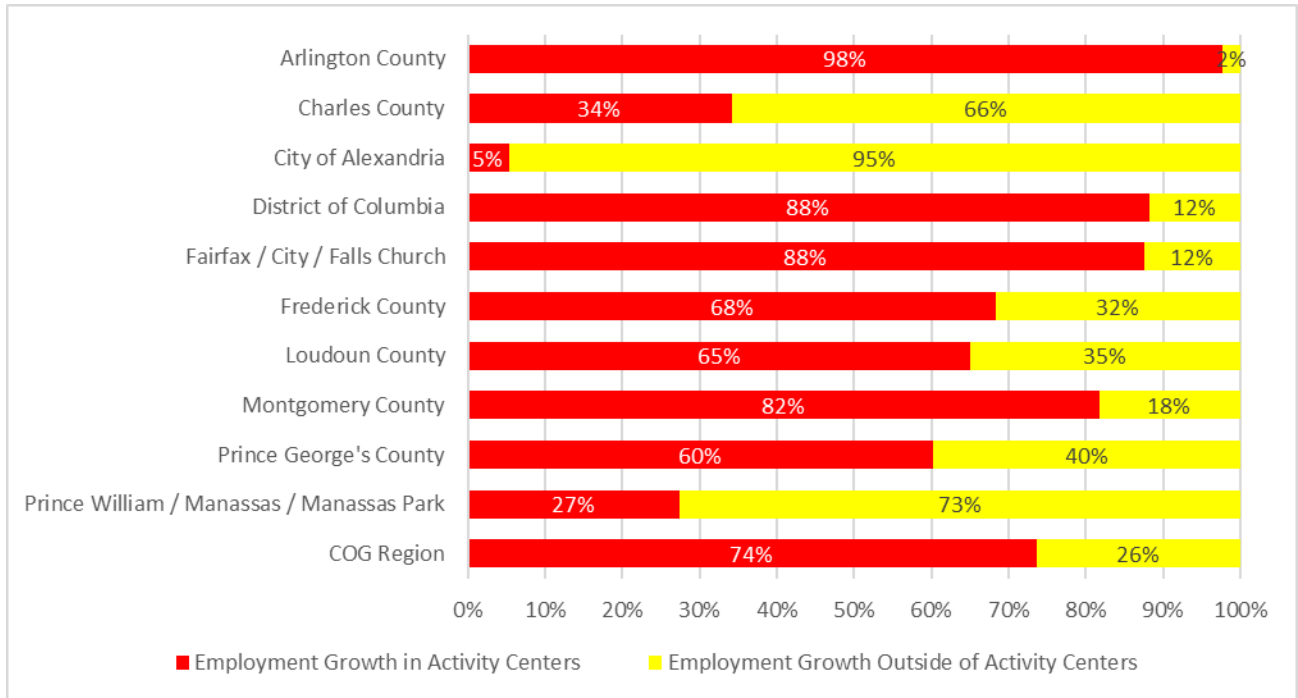
Figure 19: Round 9.2 Share of Households in Activity Centers by Jurisdiction in 2020

Arlington County: 61% | 39%
Charles County: 7% | 93%
City of Alexandria: 64% | 36%
District of Columbia: 65% | 35%
Fairfax / City / Falls Church: 23% | 77%
Frederick County: 27% | 73%
Loudoun County: 14% | 86%
Montgomery County: 34% | 66%
Prince George's County: 22% | 78%
Prince William / Manassas / Manassas Park: 19% | 81%
COG Region: 33% | 67%

■ Inside of Activity Center   ■ Outside of Activity Center
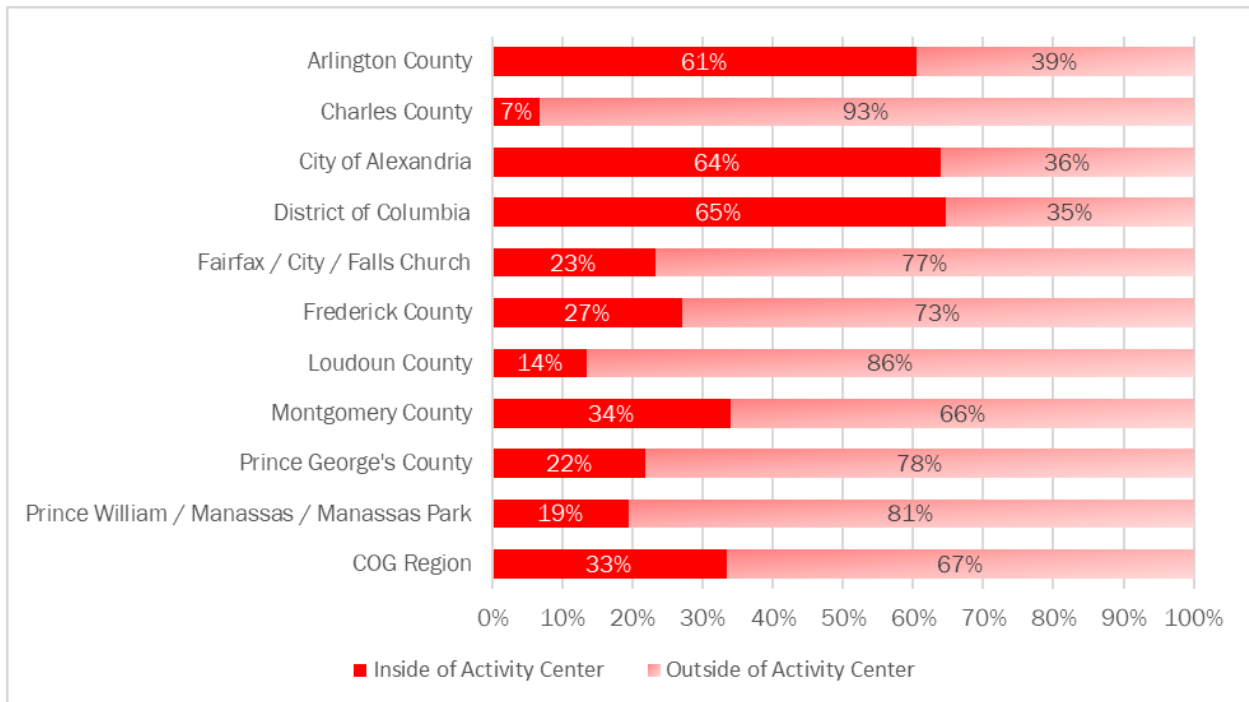
Figure 20: Round 9.2 Share of Households in Activity Centers by Jurisdiction in 2045

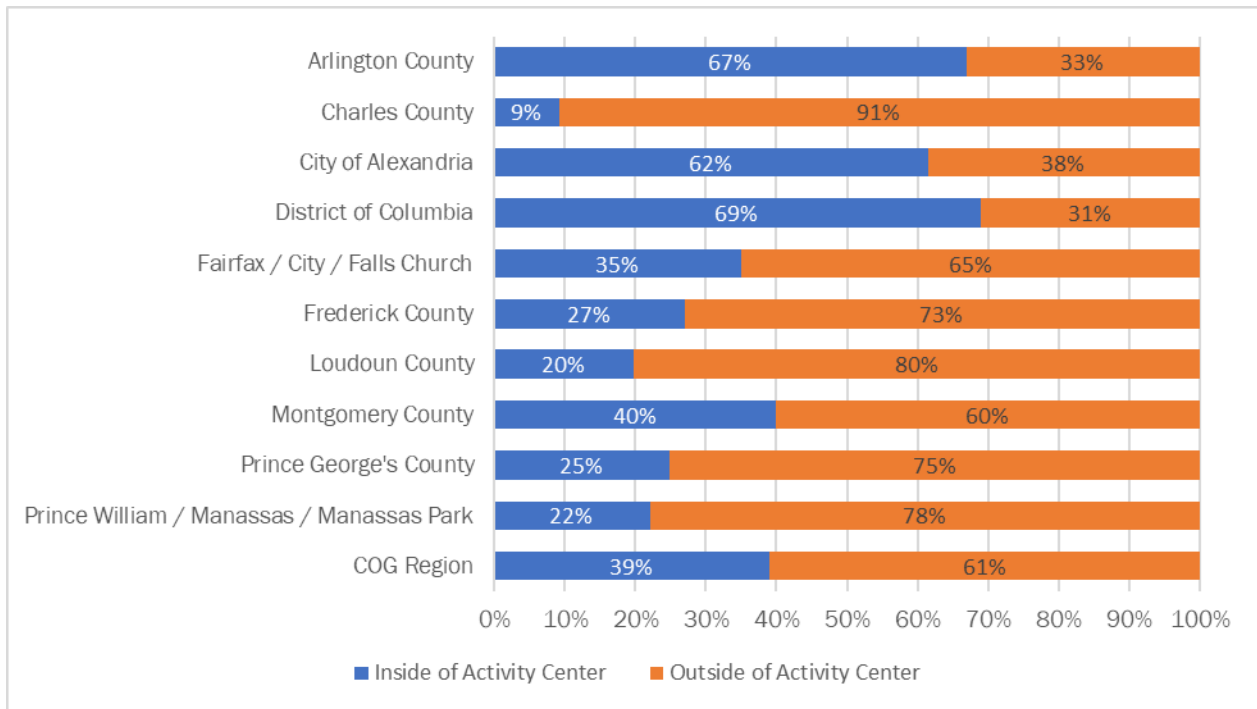| Jurisdiction	Inside of Activity Center	Outside of Activity Center
Arlington County	67%	33%
Charles County	9%	91%
City of Alexandria	62%	38%
District of Columbia	69%	31%
Fairfax / City / Falls Church	35%	65%
Frederick County	27%	73%
Loudoun County	20%	80%
Montgomery County	40%	60%
Prince George's County	25%	75%
Prince William / Manassas / Manassas Park	22%	78%
COG Region	39%	61%

Figure 21: Round 9.2 Share of Household Growth Between 2020 and 2045 Occurring in Regional Activity Centers

Jurisdiction	Household Growth in Activity Centers	Household Growth Outside of Activity Centers
Arlington County	89%	11%
Charles County	14%	86%
City of Alexandria	55%	45%
District of Columbia	84%	16%
Fairfax / City / Falls Church	81%	19%
Frederick County	27%	73%
Loudoun County	40%	60%
Montgomery County	73%	27%
Prince George's County	49%	51%
Prince William / Manassas / Manassas Park	31%	69%
COG Region	62%	38%