

ROUND 9.1 GROWTH TRENDS TO 2045

Cooperative Forecasting in Metropolitan Washington

October 2018



Metropolitan Washington
Council of Governments

**ROUND 9.1 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
Adopted on October 10, 2018

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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 the Metropolitan Washington Council of Governments (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 9.1 Cooperative Forecasts, between now and 2045, the region will add more than:

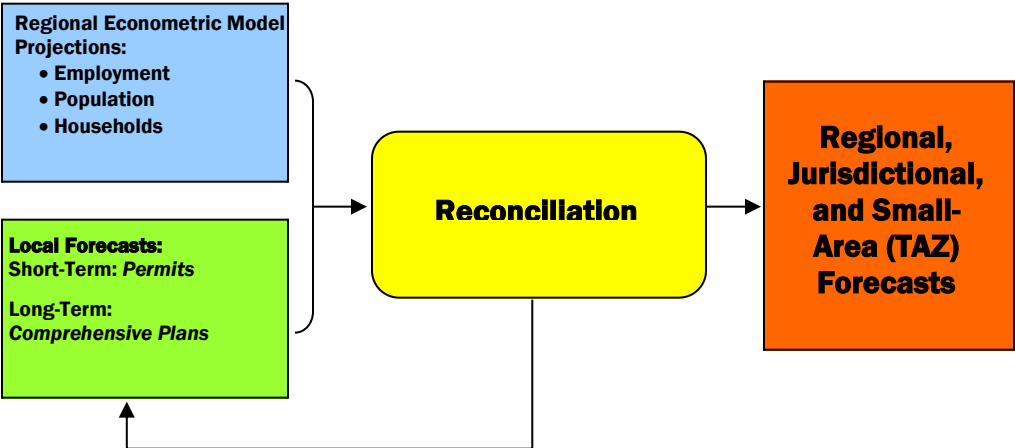
- 1.5 million people
- 1.1 million jobs
- 648,000 households

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, reviews and reconciles 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. These forecasts are Round 9.1 as adopted by the COG Board on October 10, 2018.

Table 1: Previous Rounds of Cooperative Forecasts, 1976 - 2018

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

COORDINATION

In February 2003, the COG Board of Directors adopted a resolution to further enhance coordination between regional land use and transportation planning in metropolitan Washington. Beginning with Round 6.3 and for all subsequent rounds, the Cooperate Forecasts are approved by the COG Board concurrently with the TPB approval of the results of the annual air quality conformity analysis of the Transportation Improvement Program (TIP) and the Financially Constrained Long-Range Plan (CLRP).

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 for 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 will need to re-plan and rezone land to provide sufficient housing to meet employment projections. This assumption is still implicit in the Round 9.1 Forecasts.

For the Round 8.0 Cooperative Forecasts, COG contracted 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 their June 2009 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.

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

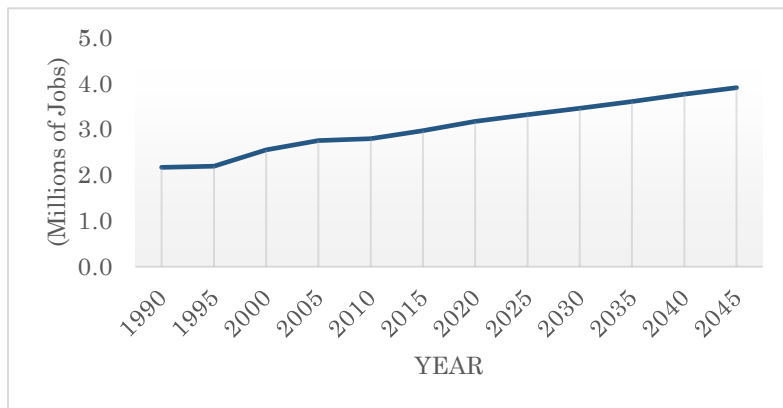


Figure 3: Forecast Job Growth by 5-Year Increment

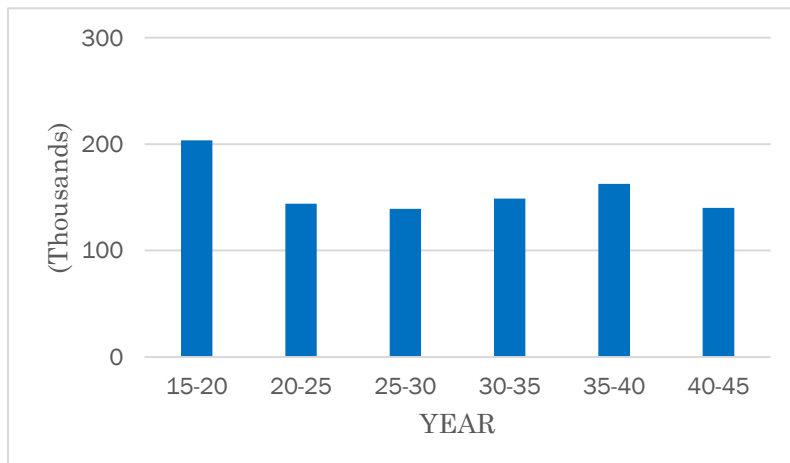
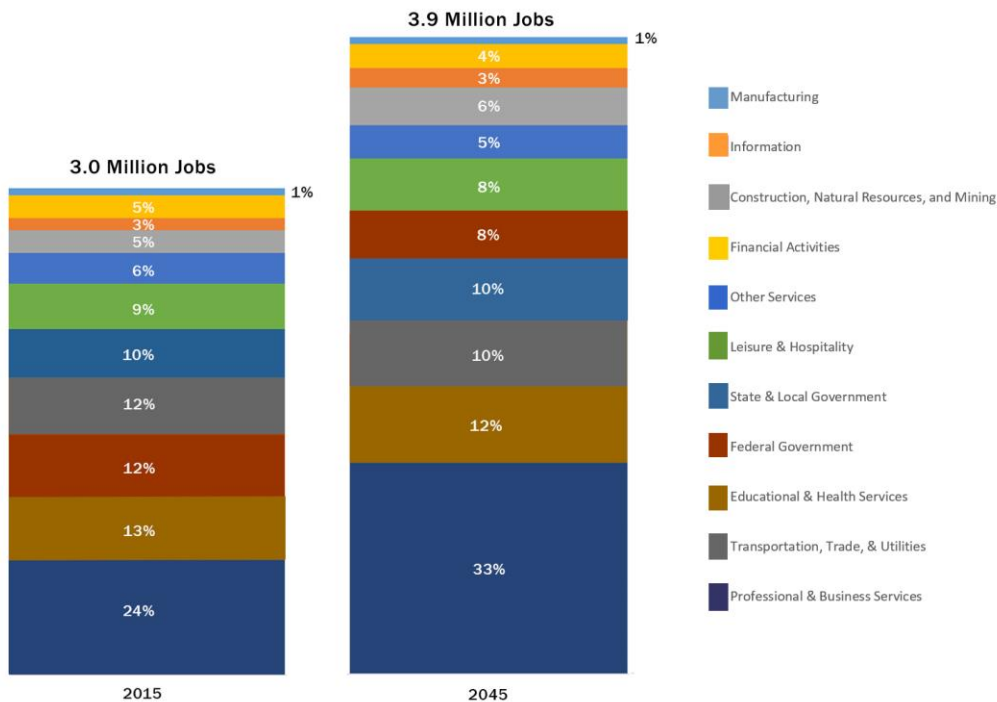


Table 2: Round 9.0 Econometric Model Results – Employment (Thousands)

	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



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

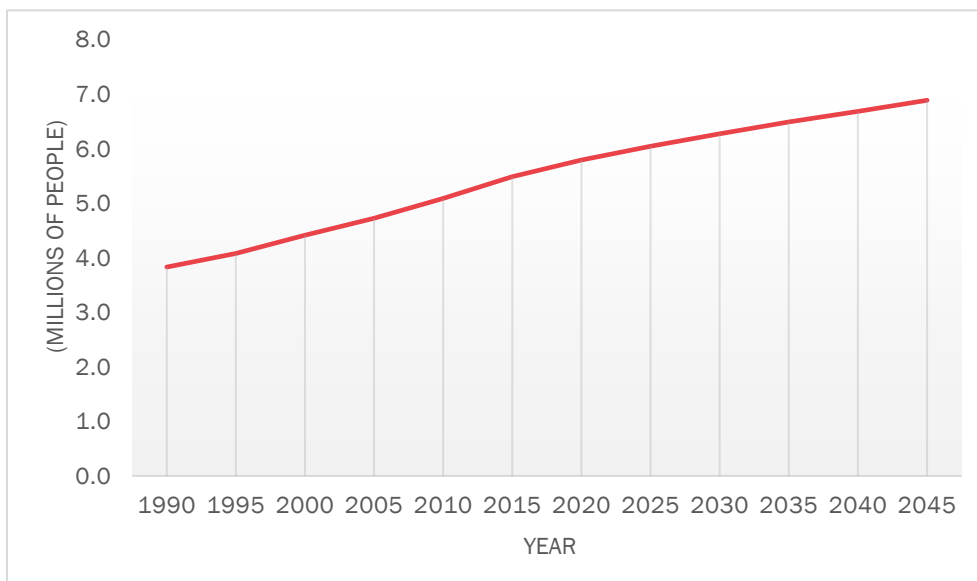


Figure 5: Historic and Forecast Population, 1990 to 2045

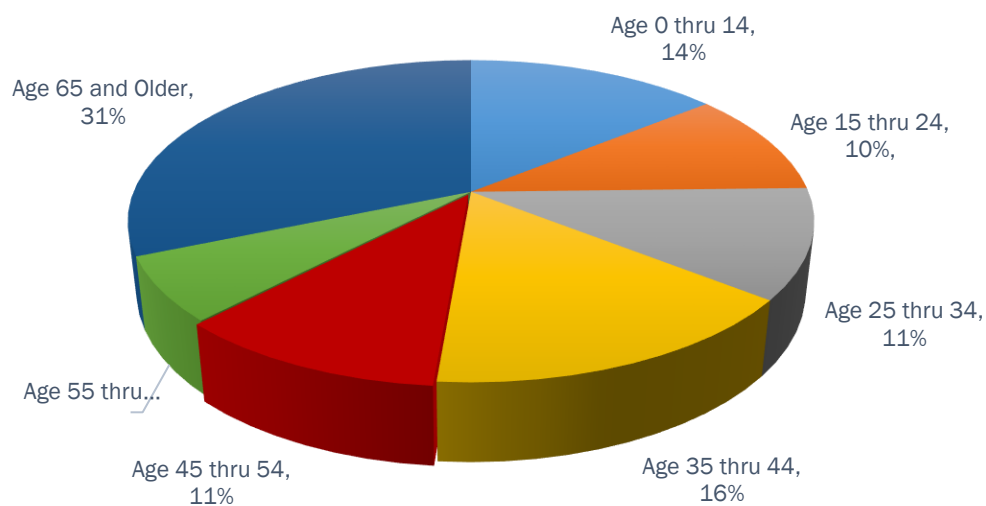


Figure 6: Share of 2015 to 2045 Population Growth by Age Group

JURISDICTIONAL FORECASTS

Employment

Job growth in Northern Virginia (53%) will outpace the growth anticipated in the Maryland jurisdictions (24%), and the District of Columbia (22%). The District of Columbia, Fairfax County, and Montgomery County would add the largest number of new jobs to the region's employment base during the 2015 to 2045 forecast period, followed by Loudoun and Prince William counties.

Collectively, the region's inner suburbs will add the largest number of new jobs, 465,000 by 2045. As with population and household growth, the largest percentage increases in the employment will occur in the outer suburbs of Virginia and Maryland. Together, these outer jurisdictions will add 293,000 jobs to the region's base, increasing their total number of jobs 26 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 jurisdictions and would account for about a fifth of the region's employment in 2045. Collectively, the central jurisdictions will account for 32 percent of regional employment.

Table 4: Summary of Intermediate Employment Forecasts Round 9.1 Cooperative Forecasts (Thousands)

JURISDICTION	2015	2020	2025	2030	2035	2040	2045	2015 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	247.1	31.0%	22.2%
Arlington County	209.7	216.9	223.5	238.4	248.9	261.0	269.1	59.4	28.3%	5.3%
City of Alexandria	106.2	110.1	121.8	127.3	135.3	142.7	155.1	48.9	46.0%	4.4%
Central Jurisdictions	1,114.2	1,173.3	1,240.4	1,303.5	1,362.4	1,415.5	1,469.5	355.4	31.9%	31.9%
Montgomery County	520.2	543.5	572.5	604.5	627.4	653.9	678.8	158.6	30.5%	14.2%
City of Rockville	76.9	78.4	80.4	82.4	86.6	90.9	96.4	19.5	25.3%	1.7%
City of Gaithersburg	46.4	47.6	50.0	52.7	56.1	61.1	65.7	19.3	41.5%	1.7%
Prince George's County	338.6	349.0	366.3	375.7	385.5	393.3	402.1	63.6	18.8%	5.7%
Fairfax County	654.1	701.7	745.4	787.2	820.4	857.7	889.9	235.8	36.0%	21.2%
City of Fairfax	22.8	22.9	23.0	23.1	23.2	23.3	23.4	0.6	2.6%	0.1%
City of Falls Church	12.0	14.3	16.2	17.6	18.0	18.3	18.6	6.6	55.0%	0.6%
Inner Suburbs	1,547.7	1,631.4	1,723.5	1,808.2	1,874.5	1,946.6	2,012.8	465.1	30.1%	41.8%
Loudoun County	167.1	195.2	219.4	243.4	262.2	277.8	291.2	124.0	74.2%	11.1%
Prince William County	143.1	164.8	184.5	203.8	222.5	240.9	257.0	113.9	79.6%	10.2%
City of Manassas	25.7	26.9	28.3	28.8	29.6	30.3	31.0	5.3	20.7%	0.5%
City of Manassas Park	4.6	4.7	4.8	4.9	5.0	5.1	5.2	0.6	12.5%	0.1%
Charles County	46.6	47.0	49.2	52.2	55.4	58.8	61.5	14.9	32.0%	1.3%
Frederick County	111.8	117.3	123.2	128.6	135.3	141.1	145.5	33.7	30.1%	3.0%
City of Frederick	50.7	52.4	54.2	56.1	58.0	60.0	62.0	11.3	22.2%	1.0%
Outer Suburbs	499.0	555.9	609.4	661.8	710.0	753.9	791.5	292.5	58.6%	26.3%
Virginia Jurisdictions	1,345.4	1,457.5	1,567.0	1,674.6	1,765.0	1,857.1	1,940.5	595.1	44.2%	53.5%
Maryland Jurisdictions	1,017.2	1,056.8	1,111.2	1,161.1	1,203.6	1,247.0	1,287.9	270.8	26.6%	24.3%
COG REGION	3,160.8	3,360.6	3,573.3	3,773.5	3,946.9	4,116.0	4,273.8	1,113.0	35.2%	100.0%

Figure 7: Employment Growth by Jurisdiction, 2015 to 2045 (Thousands)

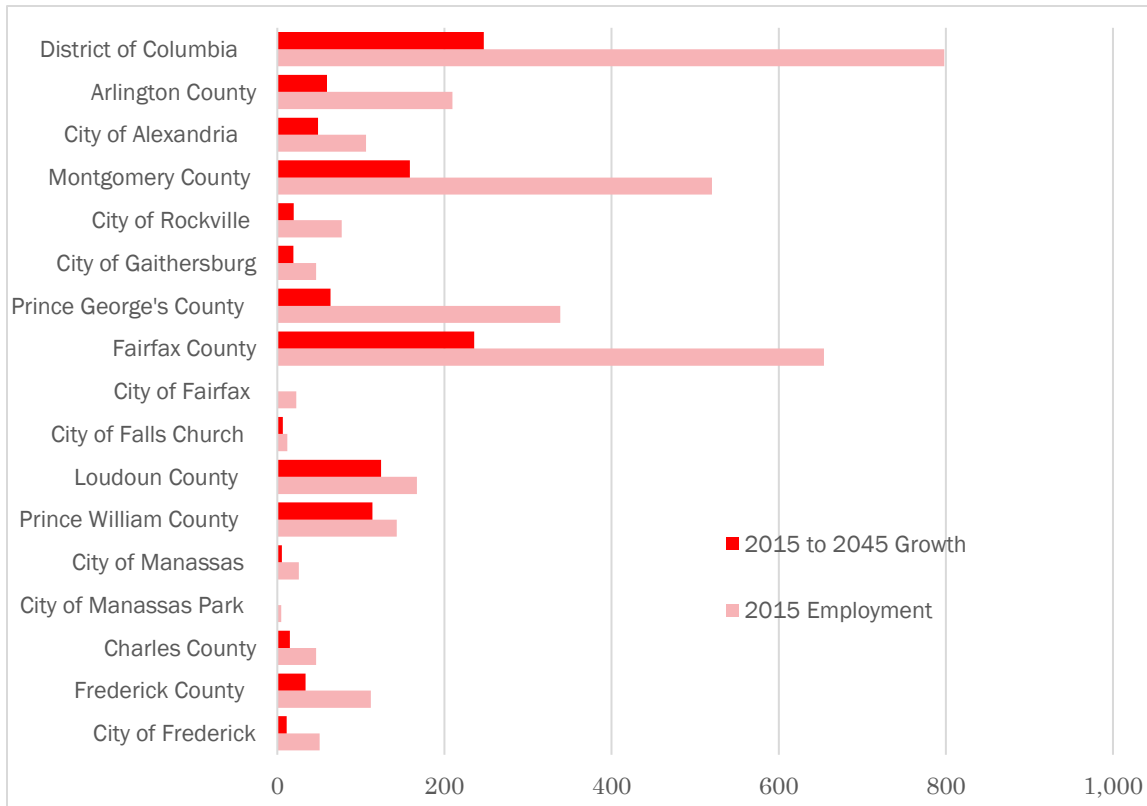


Figure 8: Percent Change in Employment by Jurisdiction, 2015 to 2045

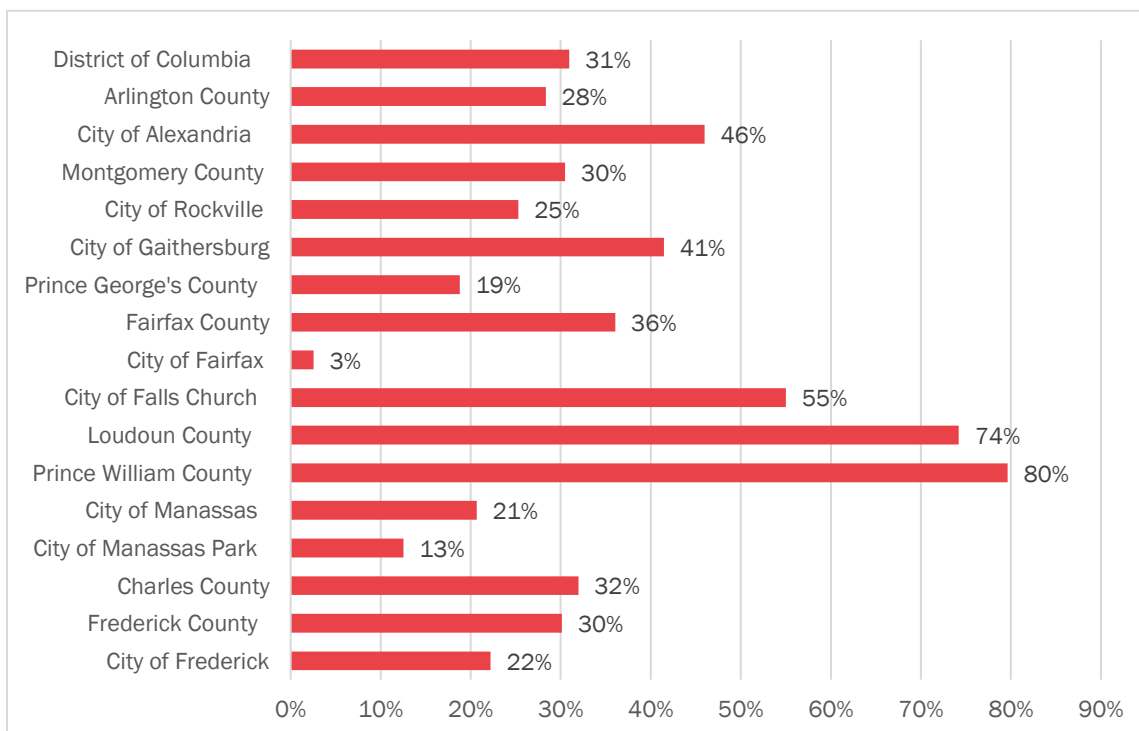
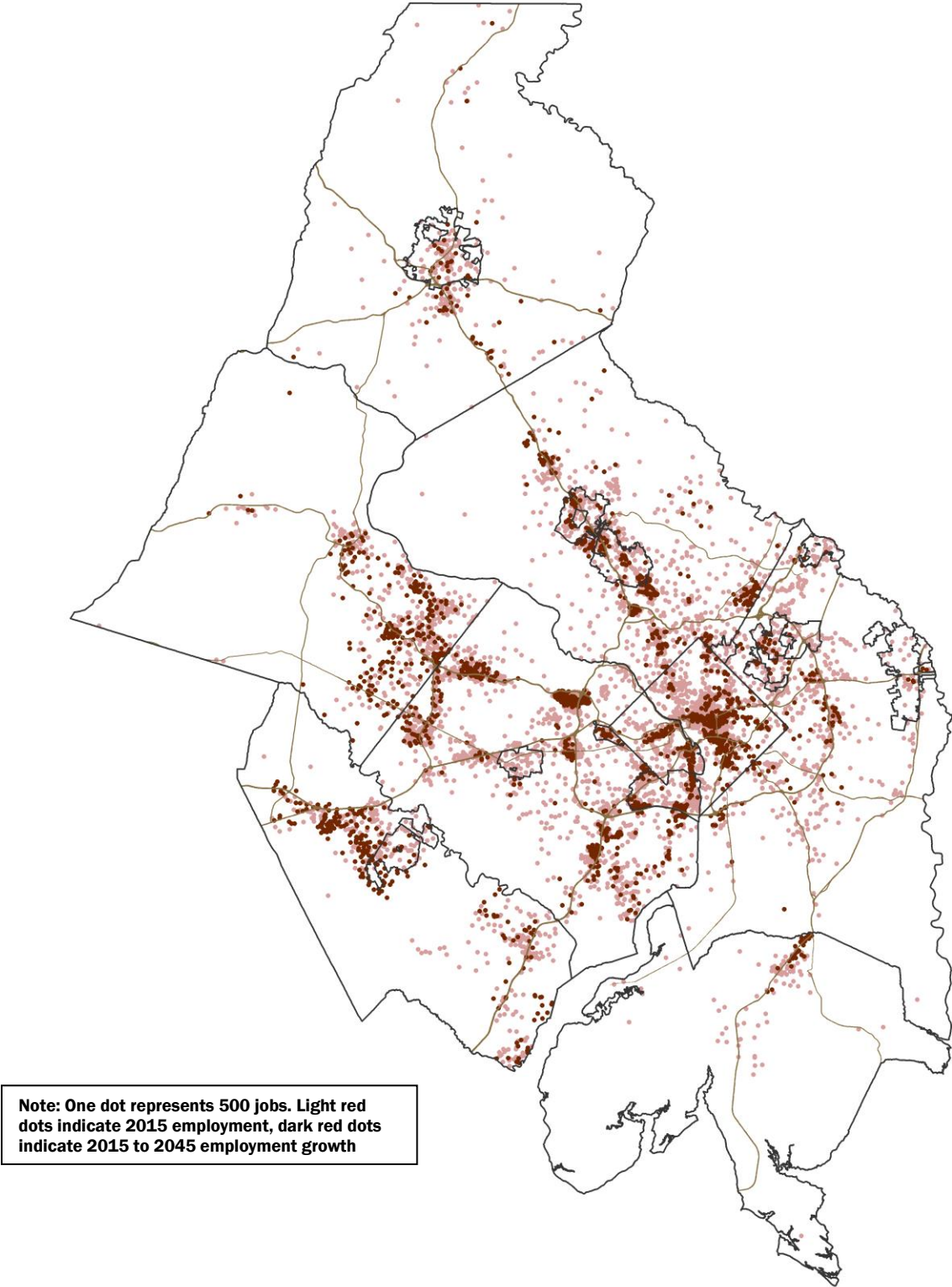


Figure 9: 2015 Employment and Projected Employment to 2045



Households

The addition of more than 648,200 households during the 2015 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 72 percent, the most rapidly of all jurisdictions, adding about 39,000 households to the 2015 total of 53,700.

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 Intermediate Household Forecasts Round 9.1 Cooperative Forecasts (Thousands)

JURISDICTION	2015	2020	2025	2030	2035	2040	2045	2015 to 2045 Growth		
								Number	% Change	Share
District of Columbia	297.1	319.3	341.0	362.5	380.6	396.2	411.9	114.8	38.6%	17.7%
Arlington County	103.8	112.0	117.9	123.9	129.8	135.6	141.8	38.1	36.7%	5.9%
City of Alexandria	71.2	75.7	80.8	84.1	87.8	92.9	107.1	35.9	50.4%	5.5%
Central Jurisdictions	472.1	507.0	539.7	570.5	598.2	624.7	660.8	188.7	40.0%	29.1%
Montgomery County	374.9	391.2	405.7	422.3	438.1	450.9	461.9	87.1	23.2%	13.4%
City of Rockville	26.4	28.8	31.1	33.5	35.2	37.4	39.4	12.9	48.9%	2.0%
City of Gaithersburg	24.7	26.0	27.5	28.9	30.5	32.1	33.4	8.8	35.5%	1.4%
Prince George's County	321.1	334.3	343.9	355.5	363.3	370.0	376.8	55.6	17.3%	8.6%
Fairfax County	403.9	414.5	436.8	463.5	487.4	508.9	528.1	124.2	30.7%	19.2%
City of Fairfax	8.9	9.6	11.1	12.1	12.5	13.0	13.5	4.5	50.9%	0.7%
City of Falls Church	5.5	6.2	6.9	7.4	7.7	7.9	8.2	2.7	49.1%	0.4%
Inner Suburbs	1,114.4	1,155.8	1,204.3	1,260.7	1,309.1	1,350.8	1,388.5	274.1	24.6%	42.3%
Loudoun County	121.1	137.9	150.1	158.0	163.9	167.0	168.7	47.6	39.3%	7.3%
Prince William County	142.9	153.9	167.1	177.0	185.2	191.9	197.2	54.3	38.0%	8.4%
City of Manassas	13.6	14.2	15.0	15.4	15.7	16.0	16.4	2.7	19.9%	0.4%
City of Manassas Park	4.5	5.0	5.0	5.0	5.0	5.0	5.0	0.5	11.7%	0.1%
Charles County	53.7	60.3	65.5	72.9	78.6	83.4	92.2	38.5	71.8%	5.9%
Frederick County	89.5	99.0	107.9	115.1	121.1	126.5	131.2	41.7	46.6%	6.4%
City of Frederick	27.3	30.9	34.1	35.2	35.9	36.6	36.7	9.5	34.8%	1.5%
Outer Suburbs	425.3	470.3	510.7	543.4	569.6	589.9	610.6	185.3	43.6%	28.6%
Virginia Jurisdictions	875.5	929.1	990.7	1,046.3	1,095.1	1,138.3	1,186.0	310.5	35.5%	47.9%
Maryland Jurisdictions	839.1	884.7	923.0	965.8	1,001.1	1,030.9	1,062.0	222.9	26.6%	34.4%
COG REGION	2,011.7	2,133.1	2,254.7	2,374.6	2,476.8	2,565.4	2,659.9	648.2	32.2%	100.0%

Figure 10: Household Growth by Jurisdiction, 2015 to 2045 (Thousands)

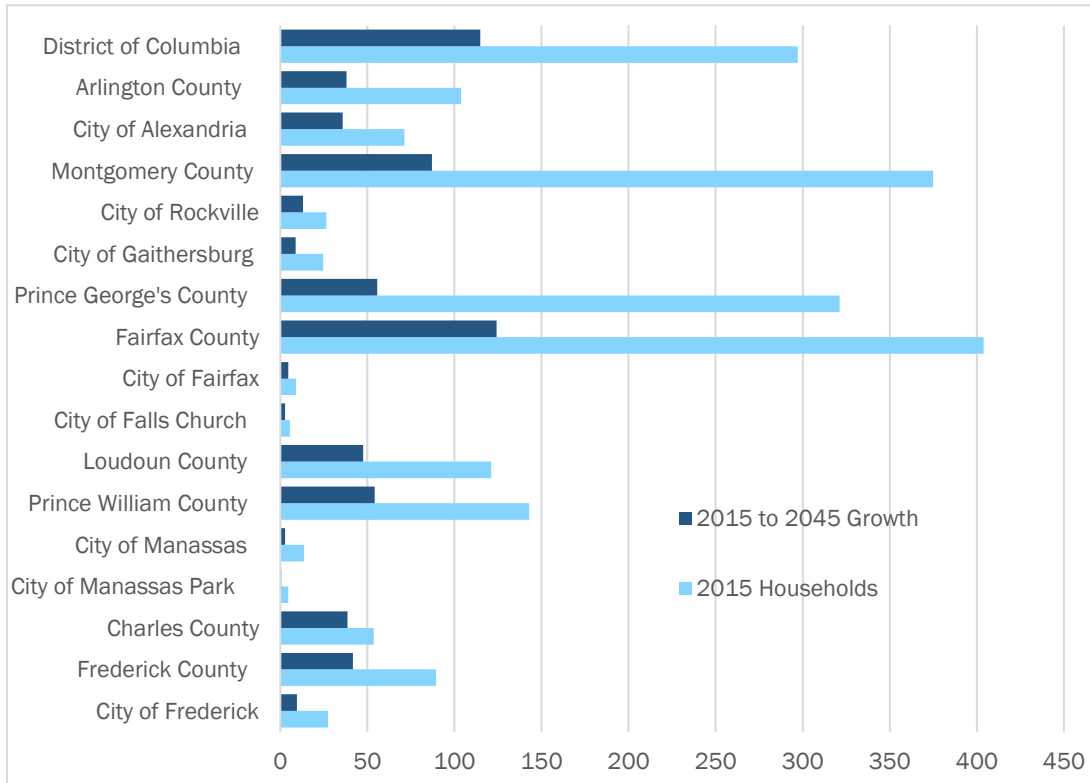


Figure 11: Percent Change in Households by Jurisdiction, 2015 to 2045

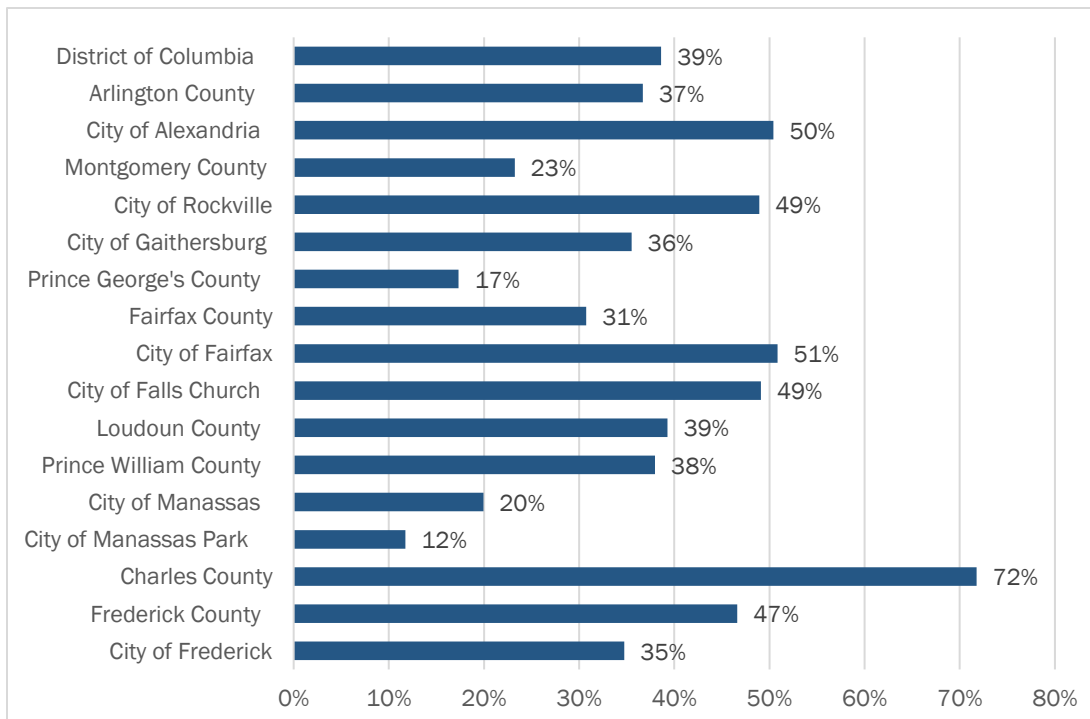
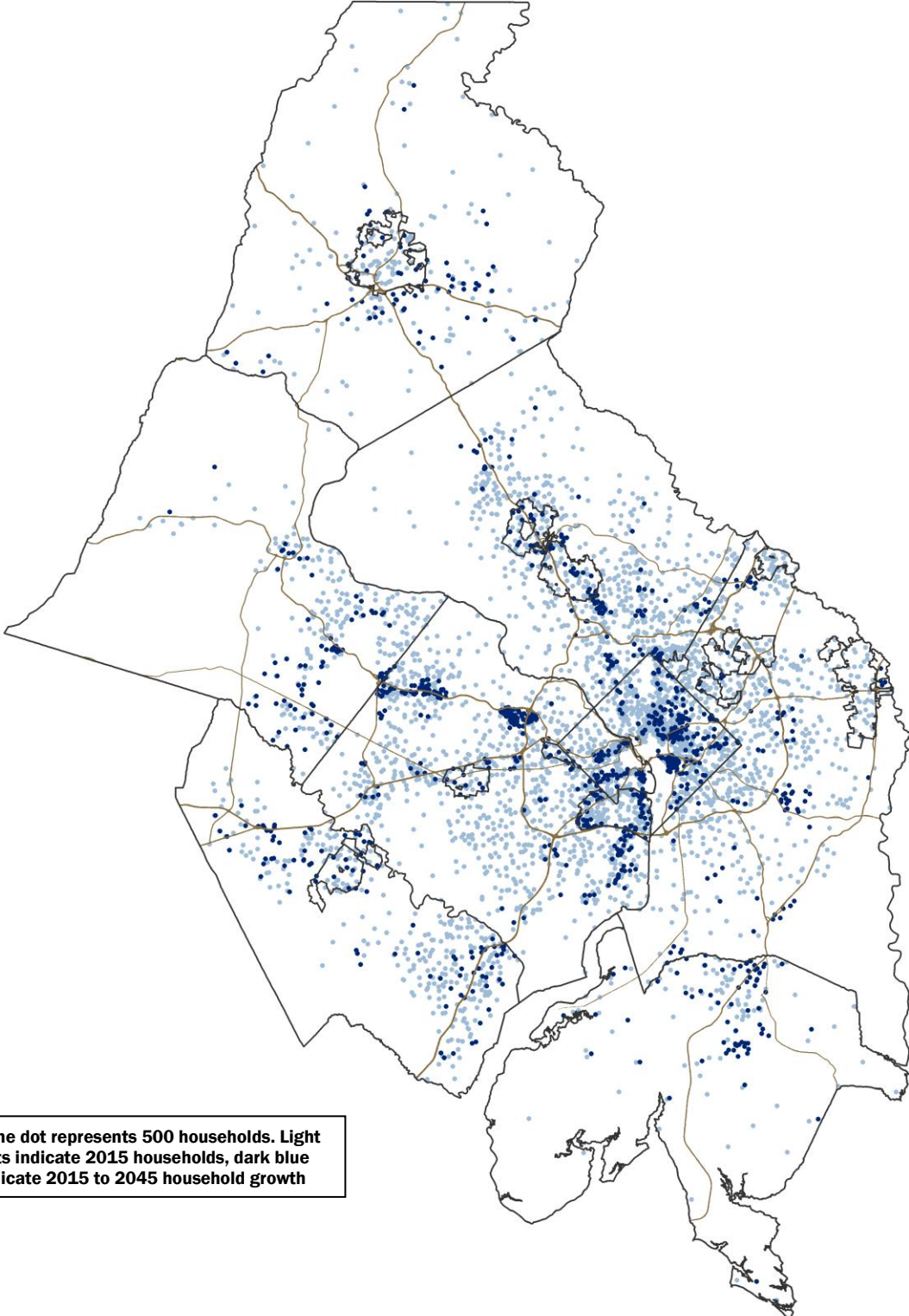


Figure 12: 2015 Households and Projected Households to 2045



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

Population

The region’s population is expected to grow steadily through the forecast period, adding an average of approximately 51,000 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 decline in average household size.

Most of the population growth will be in the District of Columbia, Fairfax, and Montgomery counties. The outer jurisdiction will experience the fastest rates of growth, led by Charles (57 percent), Frederick (40 percent), and Loudoun (38 percent) counties. The region’s central jurisdictions will also grow. In the District of Columbia, population will increase by 47 percent during the forecast period. In the City of Alexandria and Arlington County, population will increase by 36 and 41 percent, respectively.

Table 6: Summary of Intermediate Population Forecasts Round 9.1 Cooperative Forecasts (Thousands)

JURISDICTION	2015	2020	2025	2030	2035	2040	2045	2015 to 2045 Growth		
								Number	% Change	Share
District of Columbia	672.2	729.5	787.1	842.2	893.9	940.7	987.2	315.0	46.9%	20.5%
Arlington County	220.9	238.3	249.5	261.8	274.6	287.6	301.2	80.3	36.3%	5.2%
City of Alexandria	147.6	159.2	167.5	172.8	180.5	190.8	208.5	60.8	41.2%	4.0%
Central Jurisdictions	1,040.8	1,127.0	1,204.1	1,276.7	1,348.9	1,419.1	1,496.8	456.0	43.8%	29.7%
Montgomery County	1,015.3	1,052.0	1,087.3	1,128.8	1,167.7	1,197.1	1,223.3	208.1	20.5%	13.6%
City of Rockville	66.3	72.2	78.2	83.3	86.7	91.8	96.1	29.8	44.9%	1.9%
City of Gaithersburg	67.1	70.7	74.6	78.7	82.4	86.1	89.3	22.2	33.0%	1.4%
Prince George's County	904.4	923.1	938.0	953.0	967.8	982.8	995.9	91.4	10.1%	6.0%
Fairfax County	1,125.4	1,161.8	1,210.8	1,271.2	1,325.3	1,373.7	1,416.8	291.4	25.9%	19.0%
City of Fairfax	24.1	25.6	29.2	31.6	32.7	33.9	35.2	11.1	46.1%	0.7%
City of Falls Church	13.1	14.2	15.5	16.4	17.0	17.3	17.6	4.5	34.4%	0.3%
Inner Suburbs	3,082.2	3,176.7	3,280.9	3,400.9	3,510.5	3,604.9	3,688.8	606.6	19.7%	39.5%
Loudoun County	368.7	424.0	459.6	480.2	494.4	502.4	507.4	138.7	37.6%	9.0%
Prince William County	444.8	467.9	503.6	529.6	551.4	569.3	584.0	139.2	31.3%	9.1%
City of Manassas	42.5	43.8	45.5	47.5	49.0	50.6	52.1	9.7	22.7%	0.6%
City of Manassas Park	14.3	15.9	15.9	15.9	15.9	15.9	15.9	1.6	11.1%	0.1%
Charles County	150.8	167.0	178.2	194.7	207.5	218.6	236.5	85.7	56.8%	5.6%
Frederick County	246.5	267.8	288.7	303.6	319.4	332.2	344.1	97.6	39.6%	6.4%
City of Frederick	70.4	79.4	87.0	89.6	91.1	92.8	93.1	22.7	32.2%	1.5%
Outer Suburbs	1,267.5	1,386.4	1,491.5	1,571.4	1,637.5	1,688.9	1,740.1	472.5	37.3%	30.8%
Virginia Jurisdictions	2,401.3	2,550.6	2,697.1	2,826.9	2,940.6	3,041.5	3,138.6	737.3	30.7%	48.0%
Maryland Jurisdictions	2,317.0	2,410.0	2,492.2	2,580.0	2,662.4	2,730.6	2,799.8	482.9	20.8%	31.5%
COG REGION	5,390.6	5,690.0	5,976.4	6,249.0	6,497.0	6,712.8	6,925.7	1,535.1	28.5%	100.0%

Figure 13: Population Growth by Jurisdiction, 2015 to 2045 (Thousands)

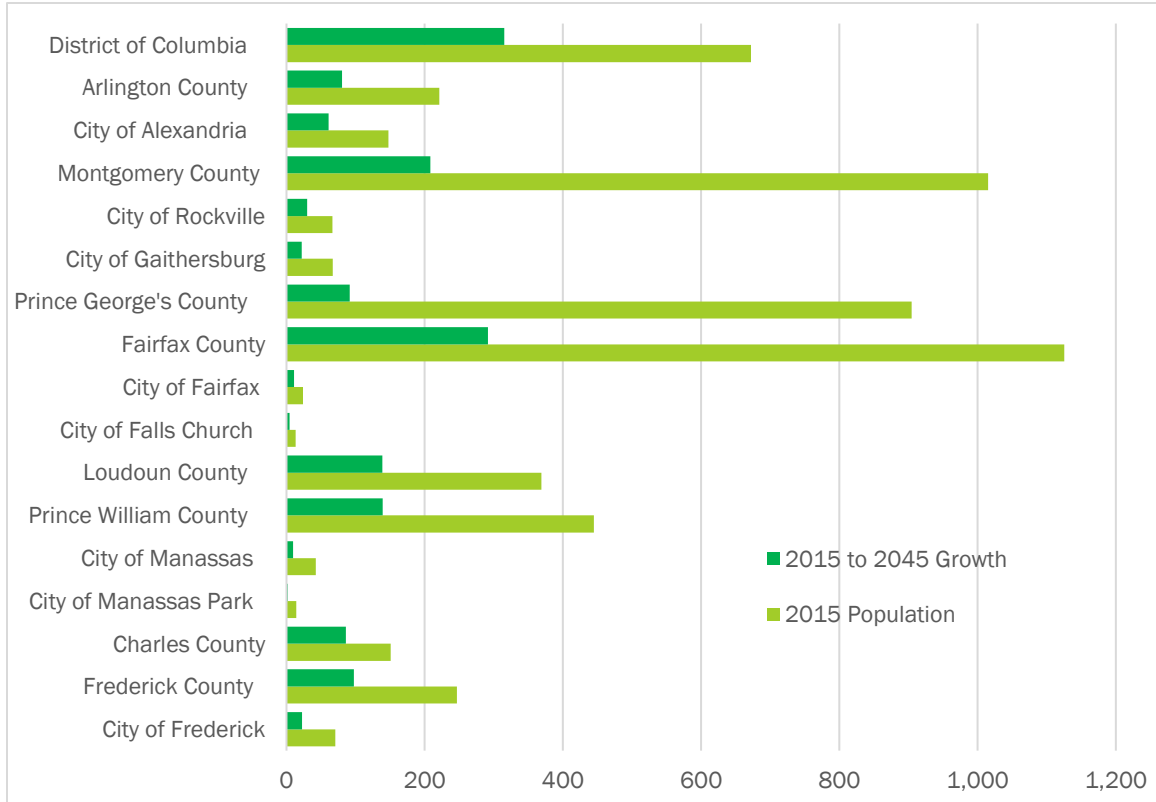


Figure 14: Percent Change in Population Growth by Jurisdiction, 2015 to 2045

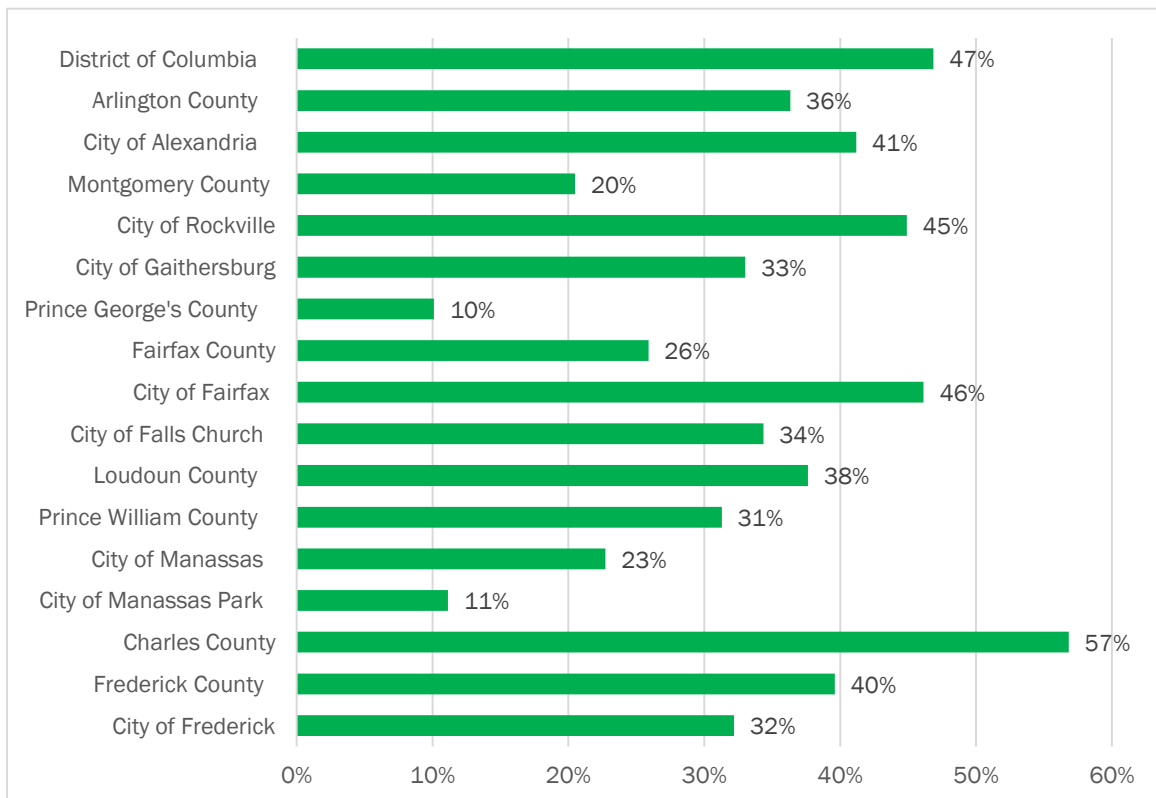
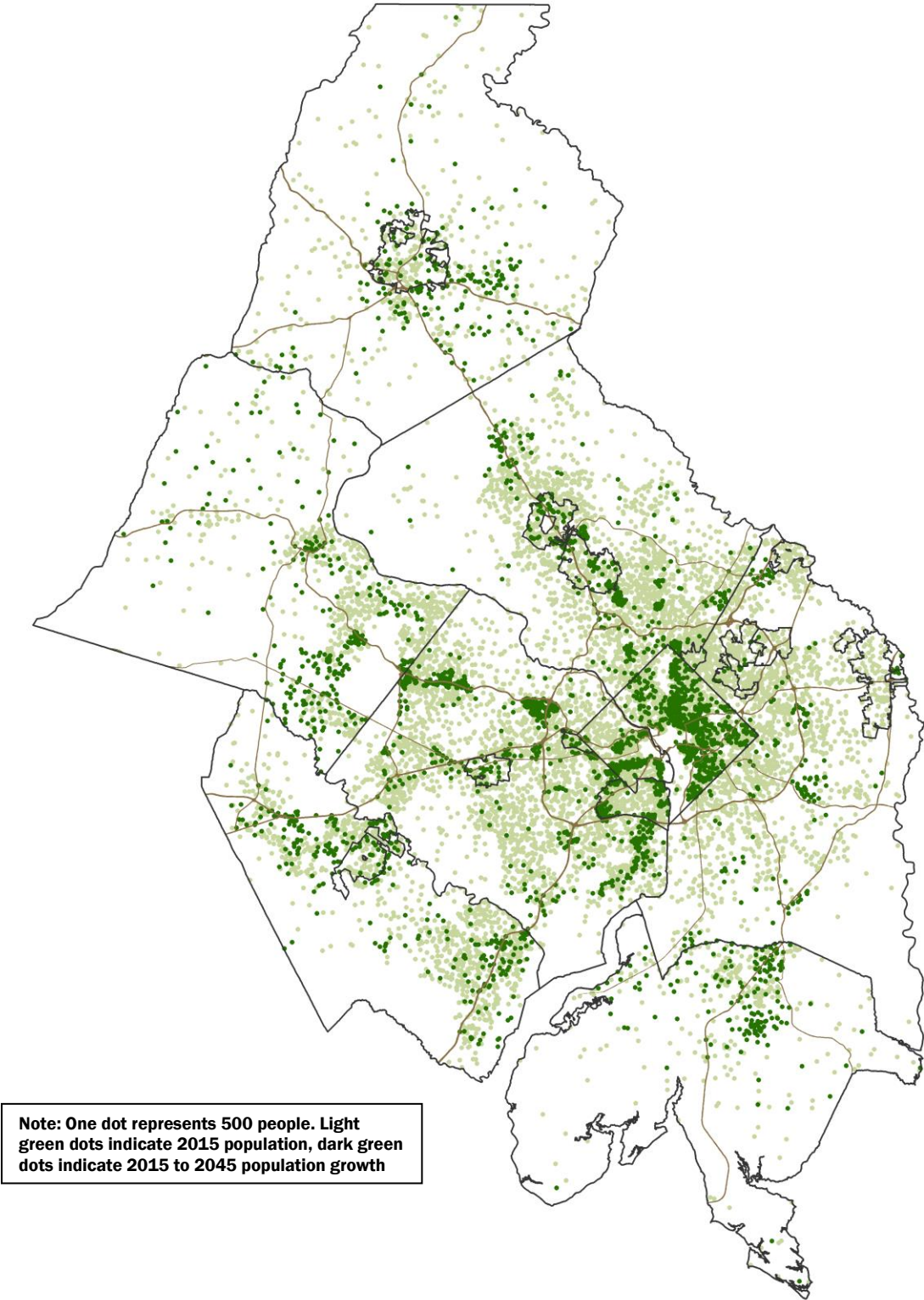


Figure 15: 2015 Population and Projected Population to 2045



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 9.1 Cooperative Forecasts, in 2015, 65 percent of the region's jobs were located in regional Activity Centers. During the 2015 and 2045 forecast period, 76 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 (87 percent), and Arlington County (85 percent).

Households in regional Activity Centers accounted for 32 percent of the region's total households in 2015. From 2015 to 2045, 64 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 (71 percent), District of Columbia (69 percent), and Arlington County (67 percent).

Map of Regional Activity Centers

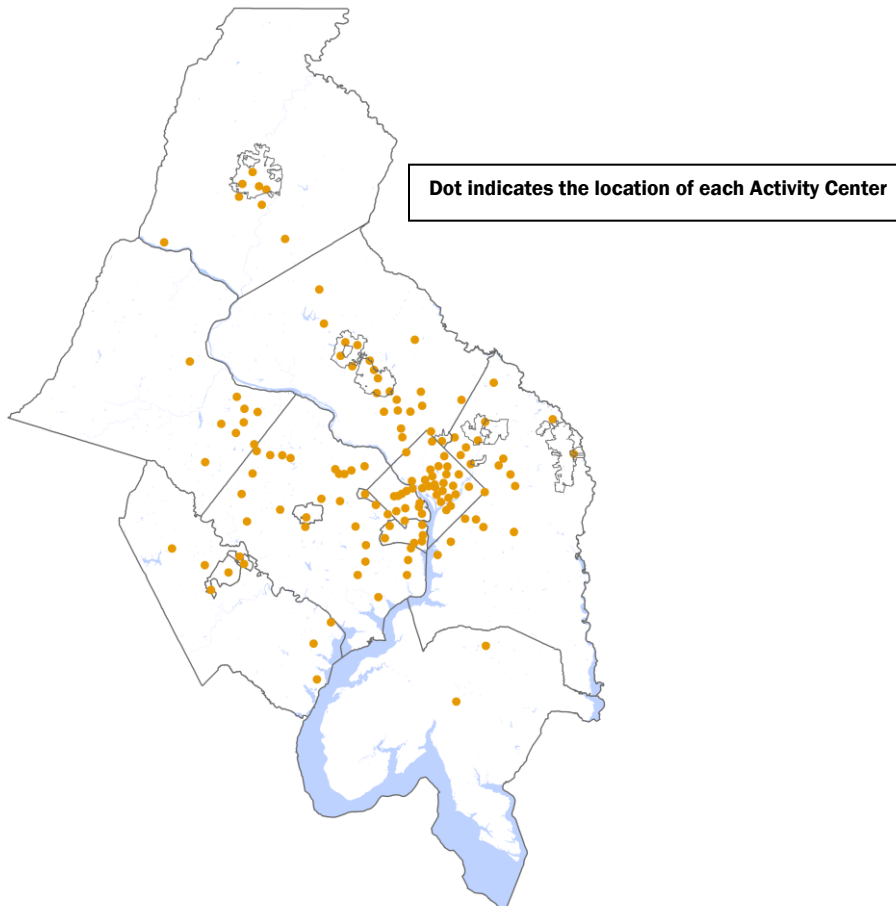


Figure 16: Round 9.1 Share of Employment in Activity Centers by Jurisdiction in 2015

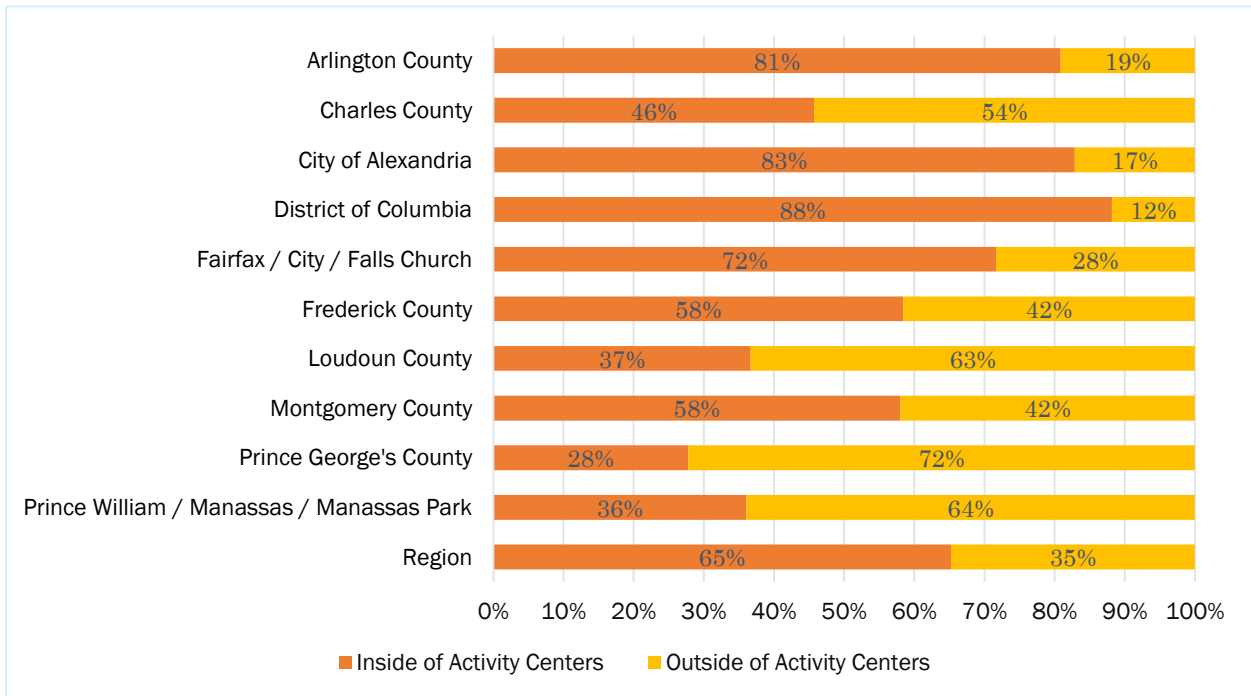


Figure 17: Round 9.1 Share of Employment in Activity Centers by Jurisdiction in 2045

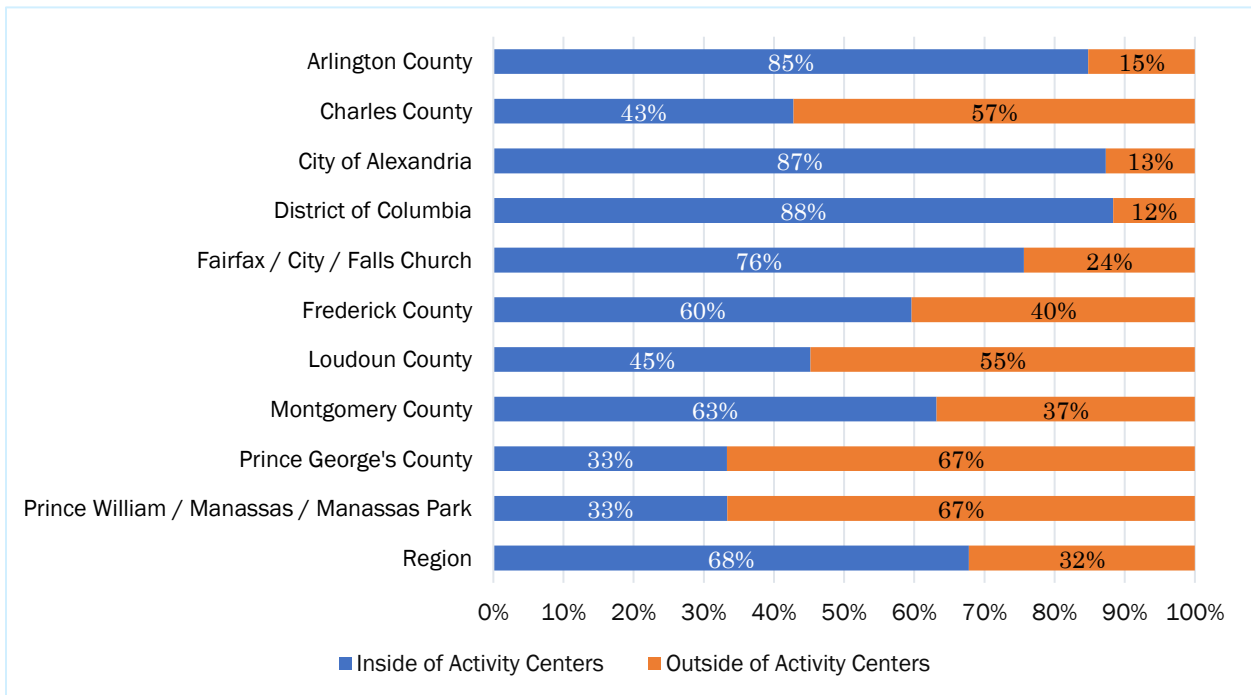


Figure 18: Round 9.1 Employment Growth Between 2015 and 2045 Occurring in Regional Activity Centers

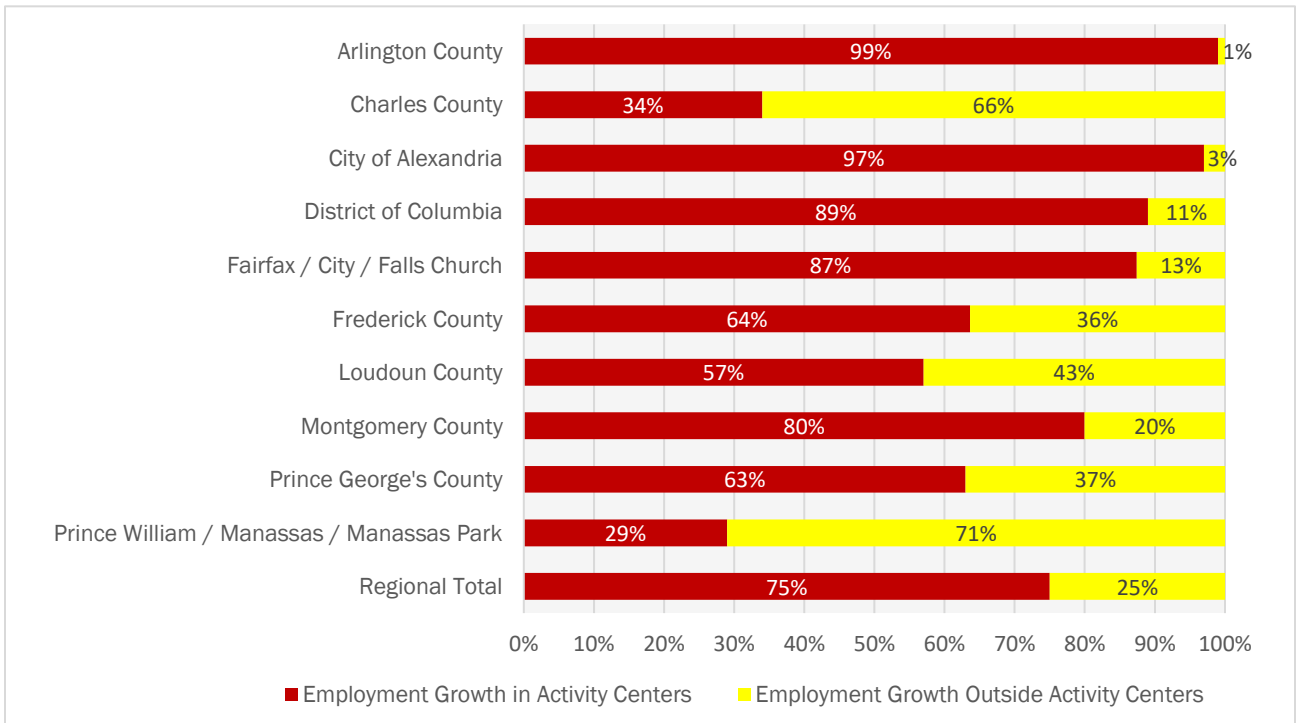


Figure 19: Round 9.1 Share of Households in Activity Centers by Jurisdiction in 2015

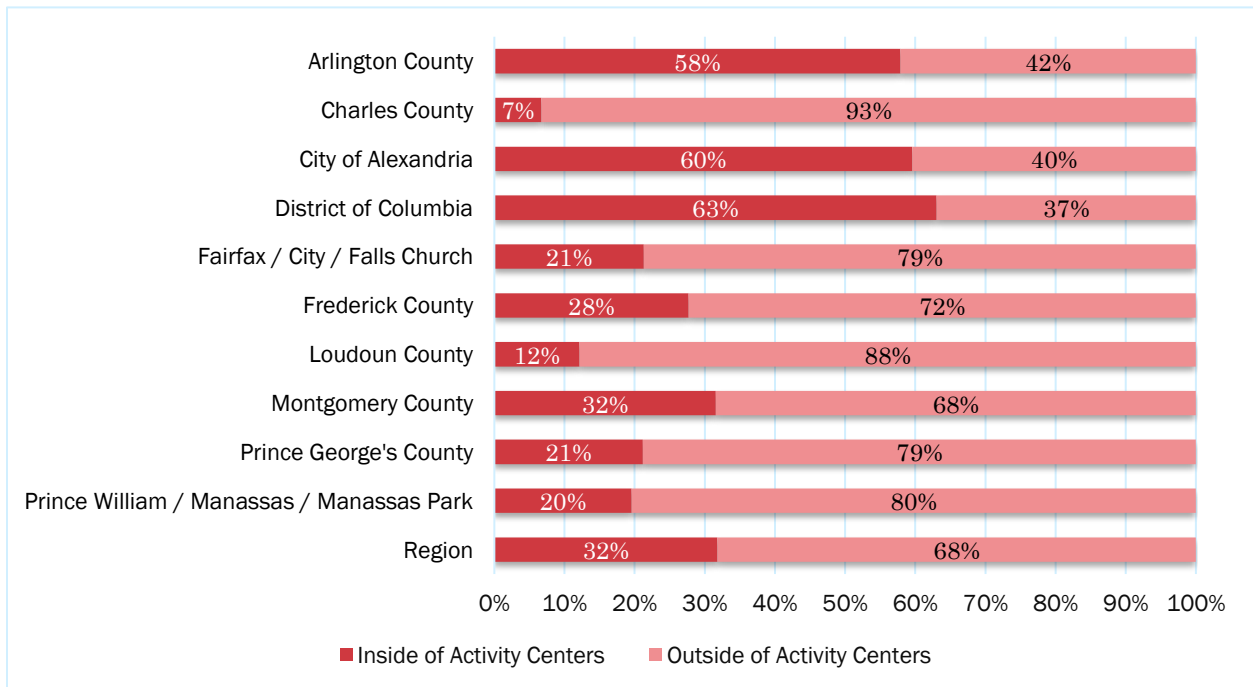


Figure 20: Round 9.1 Share of Households in Activity Centers by Jurisdiction in 2045

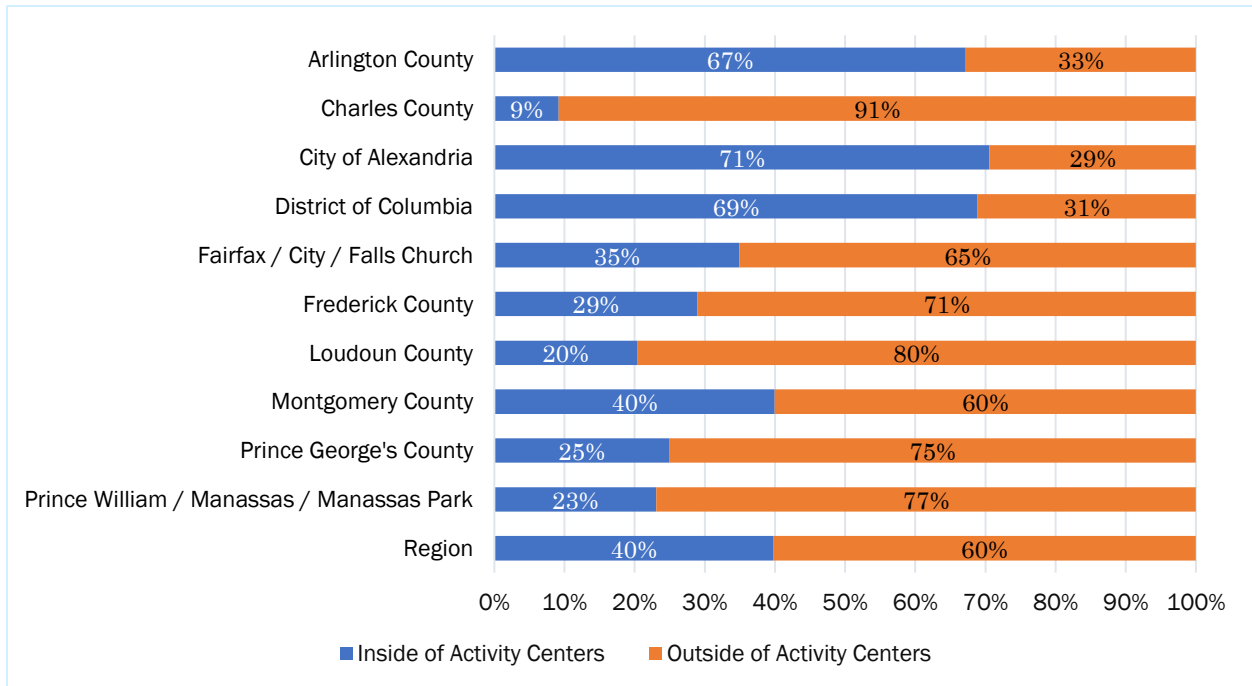
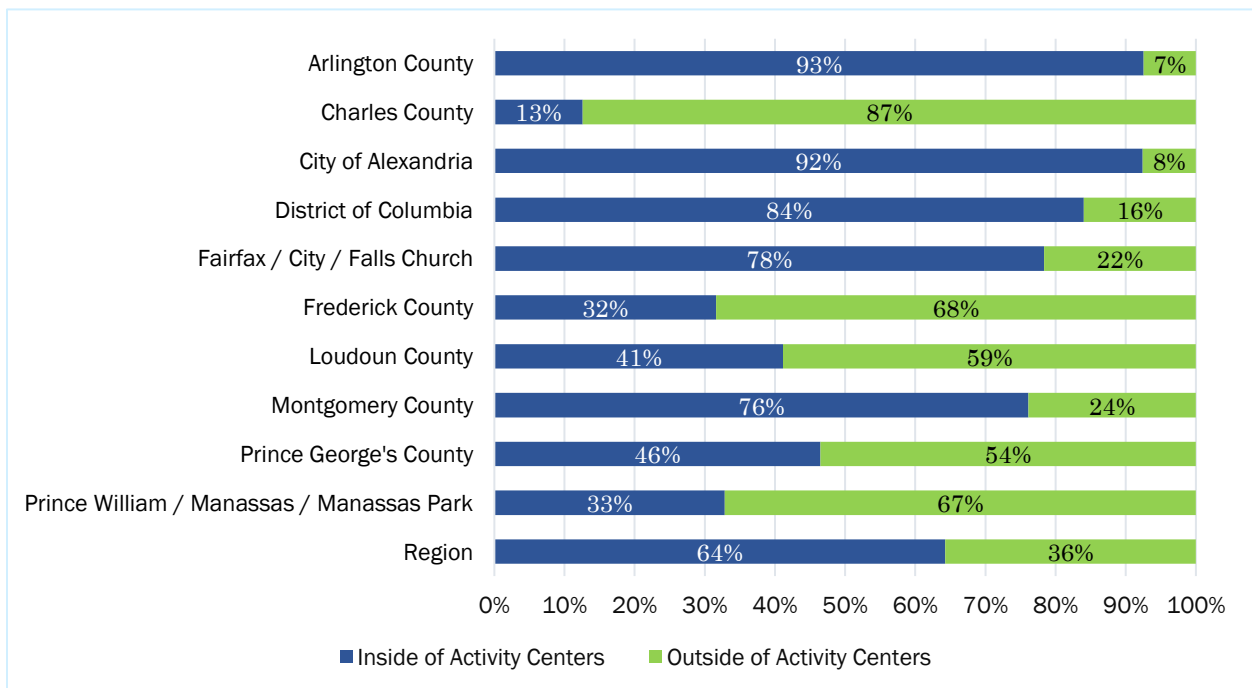


Figure 21: Round 9.1 Share of Household Growth Between 2015 and 2045 Occurring in Regional Activity Centers





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