
One Region Moving Forward

District of Columbia
*Bladensburg**
Bowie
Charles County
College Park
Frederick
Frederick County
Gaithersburg
Greenbelt
Montgomery County
Prince George's County
Rockville
Takoma Park
Alexandria
Arlington County
Fairfax
Fairfax County
Falls Church
Loudoun County
Manassas
Manassas Park
Prince William County

**Jurisdictional
Transmittal Letters
For Round 8.3**

November 2013

**Adjunct Member*

(Jurisdictional order is based on COG's letterhead)

777 North Capitol Street, NE, Suite 300, Washington, D.C. 20002
202.962.3200 (Phone) 202.962.3201 (Fax) 202.962.3213 (TDD)

GOVERNMENT OF THE DISTRICT OF COLUMBIA
OFFICE OF PLANNING



Office of the Director

Date: October 9, 2013

Mr. Paul DesJardin, Planning Section Manager
Metropolitan Washington Council of Governments
777 North Capitol Street NE, Suite 300
Washington, DC 20002

Re: Round 8.3 Cooperative Forecast

The Office of Planning (OP), in fulfillment of its responsibilities to the Metropolitan Washington Council of Governments (MWCOG) Cooperative Forecasting and Data Subcommittee, is submitting its Round 8.3 forecast. The figures are based on demographic trends, projects recently completed, under construction and in pre-development, and the capacity of the remaining developable land.

The District of Columbia forecasts of population, households and employment in five-year intervals through 2040 were prepared by the Office of Planning (OP) State Data Center and the Citywide Planning divisions. These forecasts involve the use of certain assumptions about future events that may or may not occur. Users of these forecasts should be aware that although they have been prepared with the use of detailed methodologies and with extensive attempts being made to account for demographic patterns, they may not accurately reflect the future population of the District or of particular Transportation Analysis Zones (TAZs) in the District due to some degree of uncertainty in projecting future activities.

Short and Long-term Growth Assumptions

The Round 8.3 forecast was derived using various assumptions that may impact population, households and employment in the short-term (2010-2025) and long-term (2025-2040).

Housing and Households:

- Moderate to high demand for housing will continue even as prices increase
- Interest rates will rise but remain relatively low;
- DC will continue to be an employment destination attracting recent graduates;
- An increasing share of new households will stay in the District as they form families; and
- Average household size will remain above 2.1 as the mixture of growing families and single households expands across the city.

Population:

- Population growth will continue at a slightly slower pace than the last three years;
- Fertility rates will remain fairly constant as the 30 something rate increases while the under 30 rate declines;
- Number of births are expected to increase as the population increases;
- Mortality rates are expected to continue declining slightly while survival rates improve, causing a larger natural increase in population;
- Abundance of choices for transportation, entertainment, leisure, education, health, housing, food will continue to attract and maintain more people;
- Improved public school performance and government initiatives like universal pre-K will continue to attract and retain a greater percentage of families with children; and
- Group quarters population will increase slowly as colleges add dorms and the aging population move into long-term care facilities

Employment:

- The national economy will continue to grow slowly in the short run but will pick up speed after 2015;
- After the current Federal instability slowing job growth through 2015 ends, the District will return to historic patterns of job growth;
- Job opportunities will continue to attract those 25 years of age and over;
- Growth in sectors like professional and business services, retail and accommodations and education and health services, will continue to dominate job growth in the District; however,
- Office vacancy will remain above ten percent in the short term and gradually decrease after 2015.

The major employment growth projects in Round 8.3 include the following: NoMa (TAZ 197, 201, 204, 205, 206, 282, 283), City Center (TAZ 24, 25), St. Elizabeths (TAZ 358, 360), Buzzard Point (TAZ 361); SW Waterfront/Mall (TAZ 384), Capital Riverfront (TAZ 365, 367, 368, 372).

The major residential projects in Round 8.3 are City Center (TAZ 24, 25), Parkside (TAZ 265), Dakota Crossing (TAZ 260), NoMa (TAZ 203, 204, 206) and Capital Riverfront (TAZ 365, 366, 367, 372). Household growth by TAZ is a direct result of new residential developments projects, whereas population shifts are due to increase births across the city and the internal migration of new families from multi-family housing in central Washington to mainly single-family neighborhoods such as the Georgia Ave and Petworth neighborhoods and others. All projects were examined to assess the relationships among data for population, households and employment given information on actual, planned, or proposed scenarios that may affect their outcomes.

In comparing the new forecast Round 8.3 to the past Round 8.1, as shown in the attached table, changes were made on all indicators. All three indicators, population, households and employment, are expected to grow at slightly faster rates than forecasted in Round 8.1.

Population growth from 2010 through 2040 is projected to increase by 294,800 people or 9,800 people annually, over this 30 year period. Since 2010, the average annual population growth was approximately 13,900 people, however, this number is expected to decline slightly as the national economy rebounds from the recession and other area of the country attract new residents as well. The Round 8.3 population forecast is more aggressive than the Round 8.1 forecast. The Round 8.1 forecast was influenced mainly by the population growth patterns from 2000 through 2010, while Round 8.3 forecast reflects the faster

pace growth of the population documented since the 2010 Census and supported by changes in education policy mentioned above.

Due to the strong demand for housing after the 2008-2009 economic recession, households are forecasted to increase by almost 100,000 in the 30-year period. This is 26,000 more households than previously predicted. Household size is also expected to increase gradually from 2.11 in 2010 to 2.31 by 2030 as more families choose to remain in the District.

District of Columbia Round 8.3 Forecast Summary									
Round 8.3 Draft	2010	2015	2020	2025	2030	2035	2040	Change 2010-2040	
								Number	Percent
Population	601,767	660,531	715,497	764,270	808,621	852,421	896,589	294,822	49.0
Employment	783,457	814,957	861,939	905,846	944,096	972,955	1,001,814	218,357	27.9
Households	266,707	287,110	305,544	323,147	338,026	351,970	365,771	99,064	37.0
Jobs/Housing Ratio	2.94	2.84	2.82	2.80	2.79	2.76	2.74	2.20	
Group Quarters Population	40,021	43,889	47,846	49,065	50,041	51,013	52,658	12,637	31.6
Household Size	2.11	2.15	2.19	2.21	2.24	2.28	2.31	2.85	
Previous Round 8.1 Forecast Summary									
Round 8.1	2010	2015	2020	2025	2030	2035	2040	Change 2010-2040	
								Number	Percent
Population	601,723	653,819	676,326	701,569	722,763	741,181	771,165	169,442	28.2
Employment	783,460	812,947	865,726	902,631	929,641	955,757	982,647	199,187	25.4
Households	266,707	287,617	298,115	309,979	318,252	326,410	339,889	73,182	27.4
Jobs/Housing Ratio	2.94	2.83	2.90	2.91	2.92	2.93	2.89	2.72	
Group Quarter	40,021	43,062	44,214	45,568	46,652	47,734	49,559	9,538	23.8
Household size	2.11	2.12	2.12	2.12	2.12	2.12	2.12	2.19	

On the employment front, several new under-construction and planned projects such as the six new Walmart stores supporting the growth of retail jobs, and commercial projects at City Center, NoMa/Union Station projects, Homeland Security and DC Government projects at St. Elizabeths and upcoming projects at Southwest Waterfront and the Capital Riverfront are earmarked to add a range of office and mixed-use jobs. All these projects are expected to draw large numbers of employees from both outside and within the District. Employment is forecasted to reach the one million mark by 2040, which is a 27.9 percent increase over the 2010 number of 783,457 employees (including the self-employed). In comparing Round 8.3 to the previous Round 8.1, the pattern shows more aggressive employment growth for all periods except 2020 since the office vacancy rate was adjusted upwards to account for higher amounts of unused capacity in new structures and a delayed backfill in some older structures.

Source of Data

After using U.S. Census Bureau 2010 data as the base for our population and household forecasts, we employed the housing unit method in conjunction with administrative data (vital records) to derive population growth. The main data sources were the Department of Consumer and Regulatory Affairs building permits and the Department of Health births and deaths data. While we examined other data files such as the Department of Employment Services ES-202 data and InfoUSA business and employment data as checks and balances in our analyses, both these sources had incomplete data.

Internal Review and Approval Process

The internal review process is undertaken by staff of the State Data Center and City-wide Planning divisions. However, some initial inputs on specific developments are provided by OPs Neighborhood Planning division ward planners. After the forecast data is summarized and analyzed, it is submitted to OP's director for review and approval before being submitted to COG.

Altogether, the forecast is for continued growth in the national and local economy. This forecast is generally consistent with the employment growth forecast from the District's Department of Employment Services. It must be admitted that uncertainty in the national arena, such as the shutdown of the federal government, can derail the predicted path of the indicators, but we are confident that given the information available at present, this is the best estimate of our population, household and employment numbers through 2040.

Sincerely,



Harriet Tregoning
Director



MONTGOMERY COUNTY PLANNING DEPARTMENT
 THE MARYLAND-NATIONAL CAPITAL PARK AND PLANNING COMMISSION

Gwen Wright
 Planning Director
 Montgomery County Planning
 Department
 8787 Georgia Avenue
 Silver Spring, MD 20910

October 28, 2013

Paul DesJardin
 Director of Community Planning and Services
 Metropolitan Washington Council of Governments
 777 North Capitol Street, N.E., Suite 300
 Washington, DC 20002

Dear Mr. DesJardin:

This letter is to inform you of Montgomery County’s Round 8.3 control totals for employment (please see below table). We forecast at-place employment to increase by about 204,800 jobs, or 40%, in the thirty year span from 2010 to 2040.

Round 8.3 Employment Forecast
Montgomery County, MD

Year	2010	2015	2020	2025	2030	2035	2040
Population	510,300	532,000	564,400	598,800	635,300	674,000	715,100

Source: Montgomery County Planning, MNCPPC.


The employment control totals for 2010 and future years are the same as what the Planning office submitted to COG earlier this year for Round 8.2. The 2010 employment base was determined using geocoded Quarterly Census of Employment and Wages (QCEW) data with additional quality control checks using employment information from Reference USA and calculated commercial buildings’ employment capacities. Forecasted employment was computed using historical US Bureau of Economic Analysis (BEA) trend analysis of periods with a diversity of levels of jobs creation. From 2010 to 2015 it is assumed that employment growth starts at 0.6% and, year-over-year, ramps up to 1.5% by 2015. Thereafter an average growth rate of 1.19% is applied every year up to 2040.

Where Round 8.3 will differ from Round 8.2 will be in the distribution of

employment by Transportation Analysis Zones (TAZ), which we will submit to COG in February 2014. These adjustments to the forecasted employment distribution will be performed to address any instances where spatially allocated employment growth might not align with land use patterns. This will be done in consultation with planning staff that specialize in various portions of the County and transportation planners to verify that future employment intensities conform to sector plans and long range transportation plans. Staff will also consider the employment implication of sector plans approved by the County Council after Round 8.2 was submitted, including Long Branch and Chevy Chase Lake. In addition, we will weigh adding employment assumptions arising from recommendations in the Glenmont Sector Plan and the Purple Line Minor Master Plan Amendment pending County Council approvals expected in November and December respectively. Please note that neither the forecast nor the spatial distribution of employment for the Cities of Rockville and Gaithersburg will change from what was submitted in Round 8.2.

Please do not hesitate to contact Valdis Lazdins at (301) 495-4506 should you have any questions.

Sincerely,


Gwen Wright,
Planning Director

Cc: Valdis Lazdins, Chief, Research and Special Projects Division
Mary Dolan, Chief, Functional Planning
Robert Ruiz, Research Manager

October 1, 2013

Mr. Paul DesJardin, Chief of Housing and Planning
Department of Human Services, Planning, and Public Safety
Metropolitan Washington Council of Governments
777 North Capitol Street, N.E., Suite 3000
Washington, D.C. 20002-4239

RE: Round 8.3 Cooperative Forecast Jurisdiction Control Totals for Prince George's County

Dear Mr. DesJardin:

This letter transmits Prince George's County's Round 8.3 Cooperative Forecast jurisdiction control totals. As you know the county did not revise its Round 8.1 forecast during Round 8.2. For the Round 8.3 forecast, due to a number of data discrepancies observed in the 2010 base at the small area geography level resulting from inaccurate geo coding, the county will adjust its Round 8.1 population, households, and dwelling unit forecast. Participation in Round 8.3 will provide the county with the opportunity to correct distribution errors that led to some data to be allocated to inappropriate COG TAZs.

As in the Round 8.1 forecast, we will use the 2010 Decennial Census figures for dwelling units, households, and population as the base for Round 8.3. The forecast will be calculated based on a household population to dwelling unit ratio method, versus the average household size model that is traditionally used. The resulting projections show future growth more along the lines of rounds prior to Round 8.0.

During Round 8.1, population and household projections were based on a household population to dwelling unit ratio that took into account the increase in average household size experienced in the county. The projection for dwelling units was based on a simple linear regression for single-family units, and a polynomials-curve trend for multi-family units, based on historic completions from 1980-2010. These figures were slightly adjusted in the near term to account for historically high vacancy rates, reduction in completions, and the economic recession.

Given the minimal job growth identified through a review of the Maryland Department of Labor, Licensing and Regulation (DLLR) ES202 employment database, we will not adjust the county's employment forecast during Round 8.3. The projections for employment in Round 8.3 are based on a 2010 employment base figure estimate from the Bureau of Labor Standards (BLS), a military count from the Bureau of Economic Analysis (BEA), and a self-employment-ratio based on population. The assumptions for projecting employment based on growth in the county's job-to-population ratio remain unchanged from Round 8.0.

The following table presents the county's Round 8.3 control totals for population, employment, dwelling units, and households.

Mr. Paul DesJardin
Page 2
October 1, 2013

Round 8.3 Cooperative Forecast for Prince George's County

Year	Population	Employment	Dwelling Units	Households
2010	863,420	342,588	328,182	304,042
2015	881,379	356,958	342,144	323,364
2020	899,712	377,879	355,942	336,404
2025	926,744	403,134	368,850	348,604
2030	950,030	427,514	380,779	359,878
2035	972,926	457,275	391,641	370,144
2040	995,303	497,652	401,347	379,317

If you have additional questions, please contact me or Ms. Jacqueline Philson in our Countywide Planning Division at 301-952-3627.

Sincerely,



Fern V. Piret
Planning Director

- c: Al Dobbins, Deputy Planning Director, Office of the Planning Director
- Derick Berlage, Chief, Countywide Planning Division
- Jacqueline Philson, Master Planner, Countywide Planning Division
- Ted Kowaluk, Senior Planner, Special Projects Section, Countywide Planning Division



County of Fairfax, Virginia

To protect and enrich the quality of life for the people, neighborhoods and diverse communities of Fairfax County

October 9, 2013

Paul DesJardin, Director
Department of Community Planning and Services
Metropolitan Washington Council of Governments
777 North Capitol Street, N.E., Suite 300
Washington, DC 20002

Dear Mr. DesJardin:

The Department of Planning and Zoning submits the following employment control totals for Fairfax County's participation in Round 8.3. The results show a net increase in employment for 2010 and each horizon year compared to Round 8.2. More work must be completed before TAZ-level data by industry sector can be submitted. A summary of the information gathered for this update is as follows:


- Tysons has been evaluated at the sub-zone level for County transportation studies. Staff believes that Tysons' overall growth should remain the same, but growth within TAZs and industry sector needs to be adjusted.
- Staff has worked cooperatively with Fort Belvoir planners to gather data on funded and planned projects. Fort Belvoir has been working on a NEPA study that shows an increase in employment for years 2015 through 2030. The County control totals reflect the NEPA Alternative 1 study as presented to County staff. The Fort Belvoir Master Plan is also still pending approval. Once approved, County staff will incorporate any additional employment growth through 2040. Years 2010 through 2040 have also been adjusted to correct an undercount to the Humphrey's Engineering Center that shares a TAZ with Fort Belvoir.
- Data from George Mason University at the Fairfax County campus was not available for Round 8.2. The 2010 base year increased from what staff had on file. Additionally, many construction projects are underway or planned to substantiate modest growth through 2040. Employment is represented at a full-time equivalent level to account for part-time employees.

A comparison of Round 8.2 and 8.3 County control totals are listed in the following table:

County Control Totals for Employment							
	2010	2015	2020	2025	2030	2035	2040
COG Round 8.2	622,877	664,485	720,902	770,581	813,060	846,041	877,079
COG Round 8.3	625,764	668,804	730,973	783,909	823,771	855,653	886,770
Difference (8.3-8.2)	2,887	4,319	10,071	13,328	10,711	9,612	9,691
Percent Change	0.5%	0.6%	1.4%	1.7%	1.3%	1.1%	1.1%

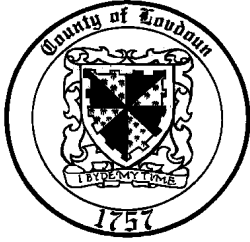
If you have any questions, please feel free to contact Kristen Hushour or Indrani Sistla at (703) 324-1380.

Sincerely,



Fred R. Selden, Director
Department of Planning and Zoning

- cc: Sterling Wheeler, Chief, Policy & Plan Development Branch, Fairfax County
- Fatima Khaja, Senior Demographer, Fairfax County
- Christopher Landgraf, Acting Chief of Facilities Planning, Fort Belvoir
- Erik Backus, Engineering Planner, George Mason University



Loudoun County, Virginia

Department of Planning

1 Harrison Street, S.E., 3rd Floor, P.O. Box 7000, MSC #62

Leesburg, VA 20177-7000

Telephone (703) 777-0246 • Fax (703) 777-0441

November 4, 2013

Paul DesJardin

Director of Community Planning and Services

Metropolitan Washington Council of Governments

777 North Capitol Street, NE, Suite 300

Washington, DC 20002

Re: Loudoun County's Proposed Round 8.3 Cooperative Forecasts

Dear Mr. DesJardin:

This letter constitutes Loudoun County's transmittal of its proposed countywide forecasts of population, households, and employment for the Round 8.3 Cooperative Forecasts. These forecasts reflect revisions to the population, household, and employment numbers that were part of the Round 8.2 series. Loudoun County's Fiscal Impact Committee has provided input and guidance on the employment forecasts. Beginning on November 7th the Fiscal Impact Committee will be providing guidance on the residential forecasts and that guidance will be incorporated into the final Round 8.3 forecasts. The Fiscal Impact Committee may make slight changes to staff's recommendations on households and population. Any changes are anticipated to be minimal, hence leading to minimal impact on the COG regional econometric model.

The household and population forecasts have been revised to account for recent development activity, re-zonings, market conditions and future land use/development constraints. The population and household forecasts have been updated to reflect two key elements: 1) growth coming on faster than previously anticipated and subsequent adjustments to the long term forecasts to reflect supply constraints, and 2) updates to household size and vacancy rate assumptions by unit type. The forecasts continue to reflect rail arriving in late 2018 or early 2019.

Like the residential forecasts, the employment forecasts continue to reflect rail arriving in late 2018 or early 2019. The employment forecasts were revised to reflect changes in the jobs anticipated in the County, based on factors such as recent development, re-zonings, and current market conditions for nonresidential development. The employment growth forecasts have been revised to reflect updated assumptions of employees per square feet and vacancy rates, most notably for flex/light industrial. In prior rounds, the flex/light industrial category included data centers. Data centers have now been broken out from flex/industrial because of their unique employment characteristics. Data centers have a much lower number of employees per square feet than flex/light industrial. The reduction in the forecasted employment from Round 8.2 to this current round is largely due to this new break down.

**Proposed Round 8.3 Cooperative Forecasts of Population, Households and Employment
Loudoun County, Virginia**

	2010	2015	2020	2025	2030	2035	2040
Population	312,300	367,100	418,000	453,200	471,200	482,300	488,000
Households	104,600	122,300	139,500	151,900	159,300	163,900	166,000
Employment	145,500	162,500	190,400	214,300	236,900	250,600	263,100

Thank you for the opportunity to submit these updated forecasts for the regional forecasting process. If you have any questions about the forecasts or the process used to develop them, please contact me or Jill Kaneff, Loudoun County's Demographer at (571) 258-3137.

Sincerely,



Julie Pastor, AICP
Director, Department of Planning

*cc: Greg Goodwin, Senior Regional Planner, Metropolitan Washington Council of Governments
Scott K. York, Chairman At-Large, Loudoun County Board of Supervisors and Representative on the
MWCOG Metropolitan Development Policy Committee
Matt Letourneau, Supervisor, Dulles District, Loudoun County Board of Supervisors and
Representative on the MWCOG Board of Directors
Tim Hemstreet, County Administrator
Joe Kroboth, Director, Department of Transportation and Capital Infrastructure
Ben Mays, Director, Department of Management and Financial Services
Buddy Rizer, Acting Director, Department of Economic Development
Jill Kaneff, Demographer, Department of Planning*