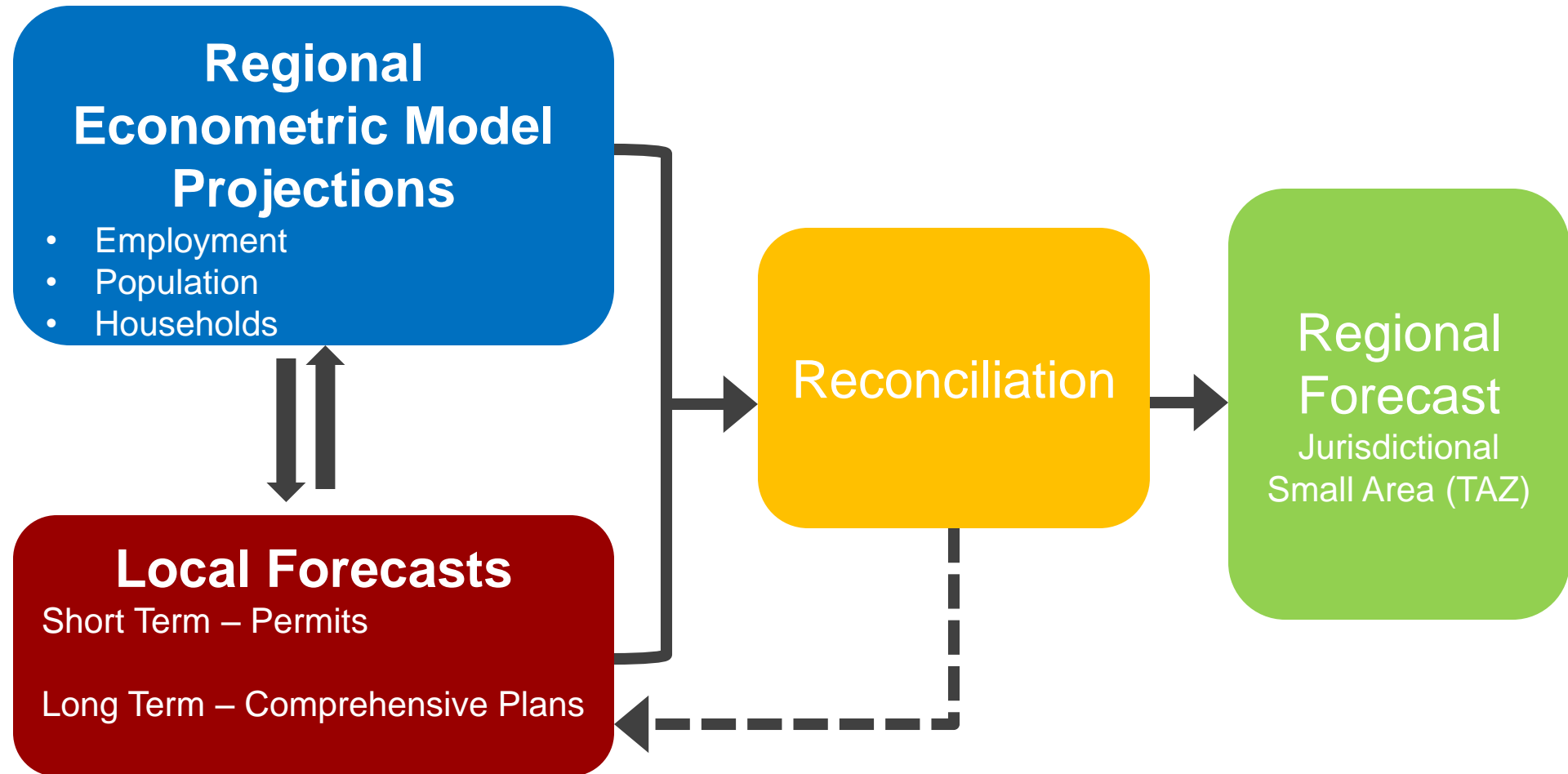


**Draft Round 9.0
Cooperative Forecasts
of Future Growth**

**Planning Directors Technical Advisory Committee
November 20, 2015**

Cooperative Forecasting Process



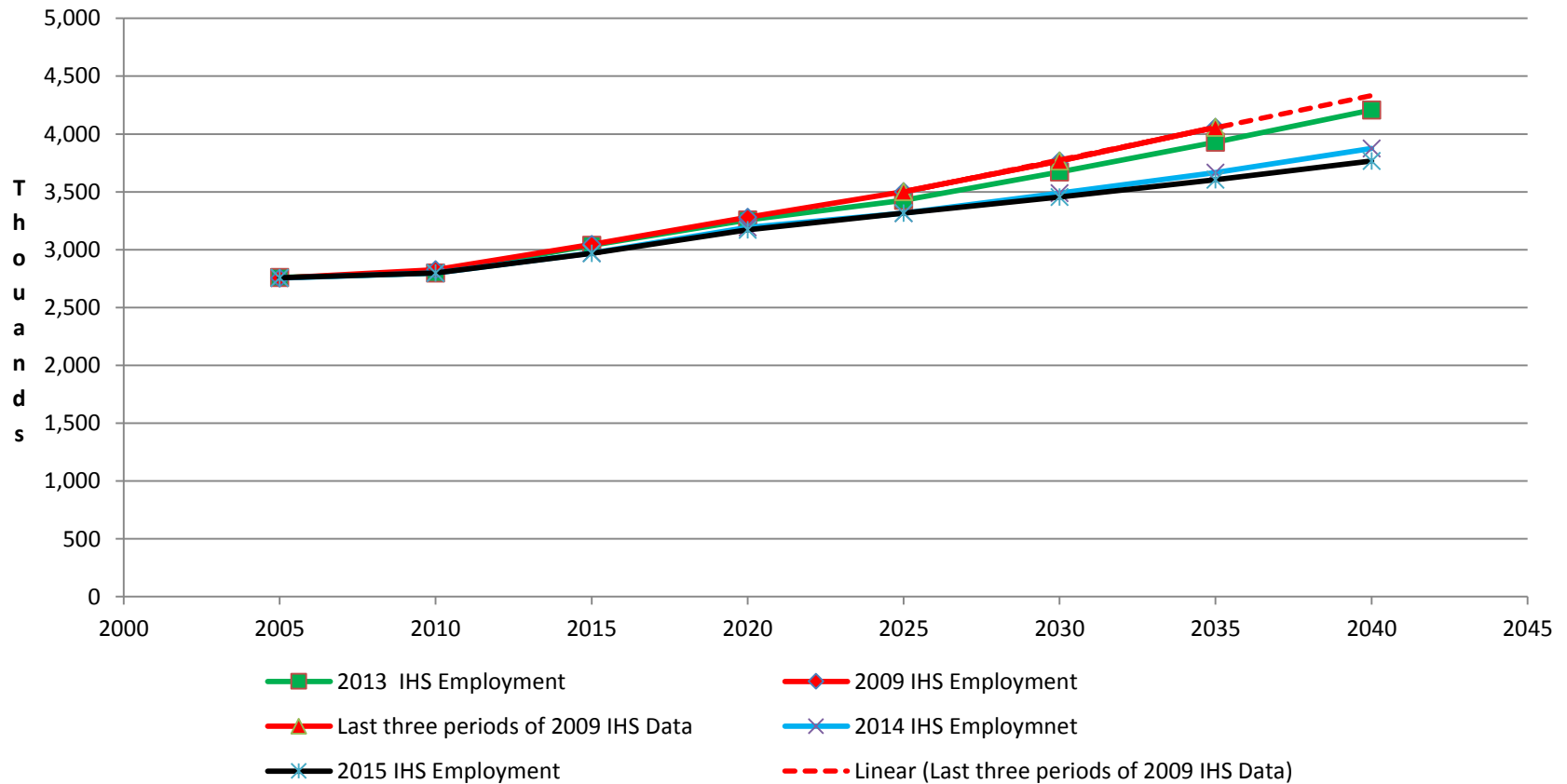
“New” IHS (Global Insight) June 2015 Data Comparison with Round 8.4

Cooperative Forecasting and Data
Subcommittee

July 14, 2015

Comparison between 2009, 2013, 2014, and 2015

Total Non-Farm Employment 1990 - 2040 COG / TPB Planning Area



Summary of Round 9.0 Econometric Model Forecasts

Round 9.0 Econometric Model Forecast Summary COG / TPB Planning Area

(Thousands)

| | <u>2015</u> | <u>2045</u> | 2015 to 2045 | |
|-------------------|-------------|-------------|---------------------|----------------|
| | | | <u>Number</u> | <u>Percent</u> |
| Employment | 3,146.2 | 4,166.0 | 1,019.8 | 32.4% |
| Population | 5,486.5 | 6,888.4 | 1,401.9 | 25.6% |
| Households | 2,009.4 | 2,775.4 | 766.1 | 38.1% |

Summary of Jurisdictional Draft Round 9.0 Cooperative Forecasts

Draft Round 9.0 Forecast Summary COG / TPB Planning Area

(Thousands)

| | <u>2015</u> | <u>2045</u> | 2015 to 2045 | |
|-------------------|-------------|-------------|---------------------|----------------|
| | | | <u>Number</u> | <u>Percent</u> |
| Employment | 3,171.1 | 4,414.6 | 1,243.5 | 41.3% |
| Population | 5,381.6 | 6,898.8 | 1,517.2 | 30.1% |
| Households | 2,006.3 | 2,647.6 | 764.2 | 34.0% |

ROUND 9.0 ECONOMETRIC MODEL RESULTS (*thousands*) - COG / TPB Planning Area

| | <u>2010</u> | <u>2015</u> | <u>2020</u> | <u>2025</u> | <u>2030</u> | <u>2035</u> | <u>2040</u> | <u>2045</u> |
|-------------------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|
| TOTAL JOBS | 2,985.2 | 3,137.4 | 3,390.8 | 3,542.9 | 3,689.8 | 3,846.8 | 4,018.4 | 4,166.0 |
| TOTAL POPULATION | 5,086.8 | 5,486.5 | 5,793.6 | 6,043.6 | 6,274.3 | 6,488.7 | 6,686.6 | 6,888.4 |
| TOTAL HOUSEHOLDS | 1,899.3 | 2,009.4 | 2,146.2 | 2,276.2 | 2,400.2 | 2,519.6 | 2,642.7 | 2,775.4 |

DRAFT ROUND 9.0 INTERMEDIATE SCENARIO (*thousands*) - COG / TPB Planning Area

| | <u>2010</u> | <u>2015</u> | <u>2020</u> | <u>2025</u> | <u>2030</u> | <u>2035</u> | <u>2040</u> | <u>2045</u> |
|-------------------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|
| TOTAL JOBS | 3,009.4 | 3,171.1 | 3,365.5 | 3,589.0 | 3,809.2 | 4,024.0 | 4,224.4 | 4,414.6 |
| TOTAL POPULATION | 5,047.5 | 5,381.6 | 5,685.9 | 5,971.1 | 6,230.4 | 6,472.5 | 6,692.7 | 6,898.8 |
| TOTAL HOUSEHOLDS | 1,883.5 | 2,006.3 | 2,133.9 | 2,257.9 | 2,373.1 | 2,474.6 | 2,564.1 | 2,647.6 |

| COG/TPB Planning Area | Absolute and Percentage Difference between Draft Round 9.0 and the Round 9.0 Econometric Model (Draft Round 9.0 minus Model Results) | | | | | | | |
|-------------------------|---|-----------------|-----------------|----------------|----------------|----------------|----------------|-----------------|
| | <u>2010</u> | <u>2015</u> | <u>2020</u> | <u>2025</u> | <u>2030</u> | <u>2035</u> | <u>2040</u> | <u>2045</u> |
| TOTAL JOBS | 24.2 0.8% | 33.7 1.1% | -25.3 -0.7% | 46.1 1.3% | 119.4 3.2% | 177.2 4.6% | 206.0 5.1% | 248.6 6.0% |
| TOTAL POPULATION | -39.3 -0.8% | -105.0 -1.9% | -107.6 -1.9% | -72.5 -1.2% | -43.9 -0.7% | -16.2 -0.2% | 6.1 0.1% | 10.4 0.2% |
| TOTAL HOUSEHOLDS | -15.8 -0.8% | -3.0 -0.2% | -12.3 -0.6% | -18.2 -0.8% | -27.2 -1.1% | -45.0 -1.8% | -78.6 -3.0% | -127.8 -4.6% |

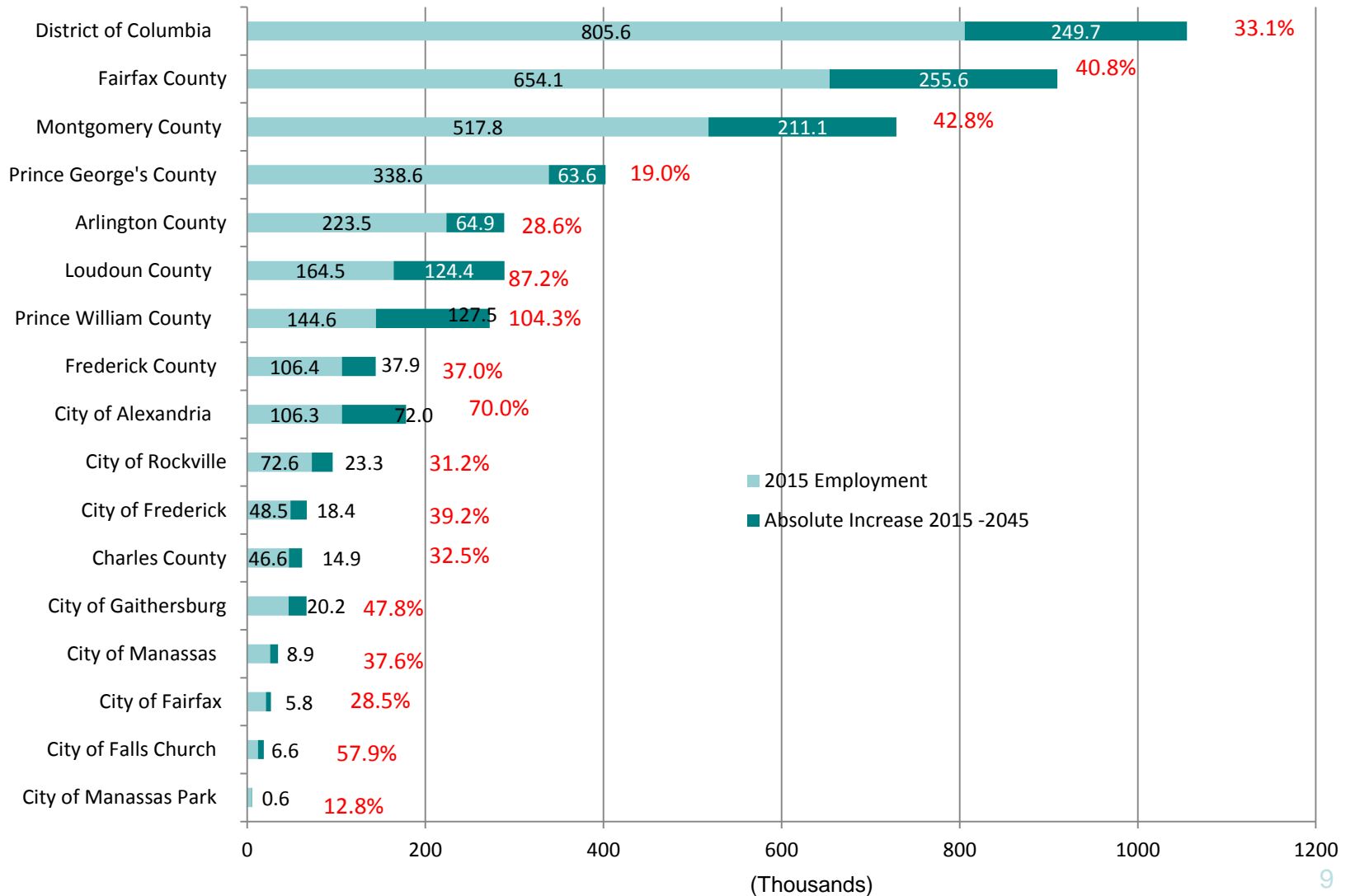
Historic and Forecast Job Growth Rates: U.S., Regional and Draft Round 9.0

| | Actual | | | Forecast | | | | | |
|------------------------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|
| | 2000-2005 | 2005-2010 | 2010-2015 | 2015-2020 | 2020-2025 | 2025-2030 | 2030-2035 | 2035-2040 | 2040-2045 |
| National | 1.5% | -2.8% | 8.9% | 6.1% | 3.7% | 3.2% | 3.2% | 3.2% | 2.9% |
| Regional IHS | 8.0% | 1.1% | 5.1% | 8.1% | 4.5% | 4.1% | 4.3% | 4.5% | 3.7% |
| Round 9.0 | --- | --- | --- | 6.1% | 6.6% | 6.1% | 5.6% | 5.0% | 4.5% |
| District of Columbia | 5.6% | 4.4% | 6.1% | 6.0% | 5.7% | 5.0% | 4.3% | 3.4% | 3.3% |
| Arlington County | 3.1% | 0.9% | 4.9% | 0.5% | 5.4% | 7.2% | 4.8% | 4.0% | 4.2% |
| City of Alexandria | 6.9% | 3.1% | 1.1% | 7.8% | 14.4% | 10.3% | 11.2% | 6.9% | 3.7% |
| Montgomery County (1) | 2.2% | -2.6% | 4.4% | 4.6% | 5.3% | 5.8% | 6.2% | 6.5% | 6.8% |
| Prince George's County | 1.0% | -3.8% | 1.8% | 3.1% | 5.0% | 2.6% | 2.6% | 2.0% | 2.2% |
| Fairfax County | 10.3% | 2.3% | 1.9% | 7.4% | 6.7% | 5.5% | 5.5% | 4.8% | 4.0% |
| Loudoun County | 45.0% | 10.2% | 15.3% | 14.3% | 11.7% | 11.4% | 8.6% | 7.4% | 5.9% |
| Prince William County | 39.1% | -1.4% | 21.4% | 14.1% | 11.8% | 11.0% | 10.6% | 10.7% | 8.6% |
| Charles County | 10.9% | -1.3% | 3.0% | 0.8% | 4.8% | 6.0% | 6.1% | 6.1% | 4.7% |
| Frederick County (2) | 17.2% | 1.6% | 5.9% | 4.8% | 4.5% | 7.9% | 5.9% | 4.6% | 3.7% |
| City of Fairfax | 47.9% | -15.6% | 3.1% | 5.4% | 4.0% | 4.1% | 4.0% | 4.0% | 3.8% |
| City of Falls Church | 5.6% | -14.7% | -5.2% | 19.2% | 13.3% | 8.6% | 2.3% | 1.7% | 1.6% |
| City of Manassas | 29.5% | -2.7% | -3.7% | 2.1% | 6.4% | 6.0% | 5.6% | 5.3% | 5.1% |
| City of Manassas Park | 2.9% | -26.0% | 6.4% | 2.0% | 2.0% | 2.0% | 2.0% | 2.0% | 1.9% |

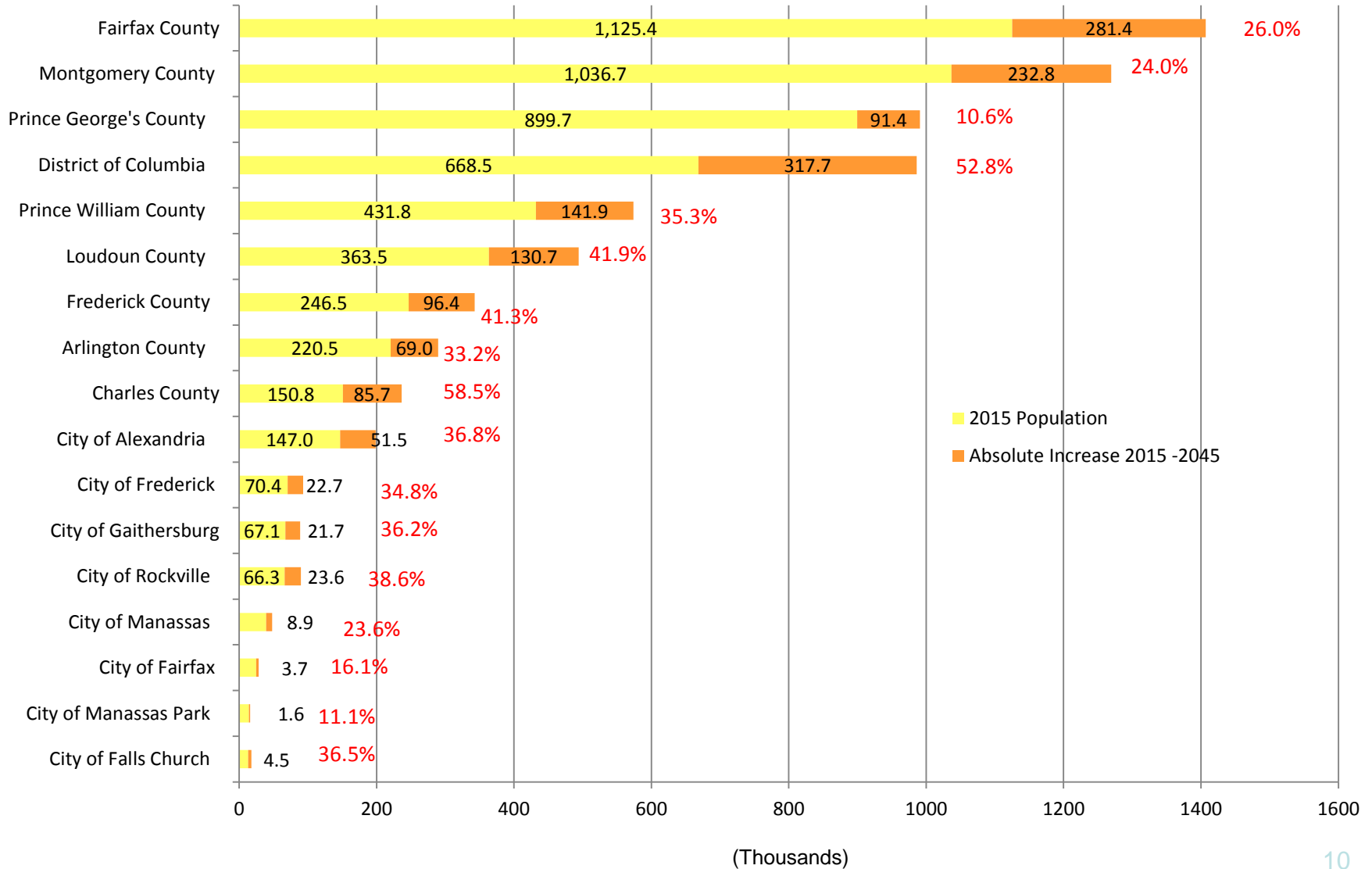
(1) Includes the Cities of Rockville and Gaithersburg

(2) Includes the City of Frederick

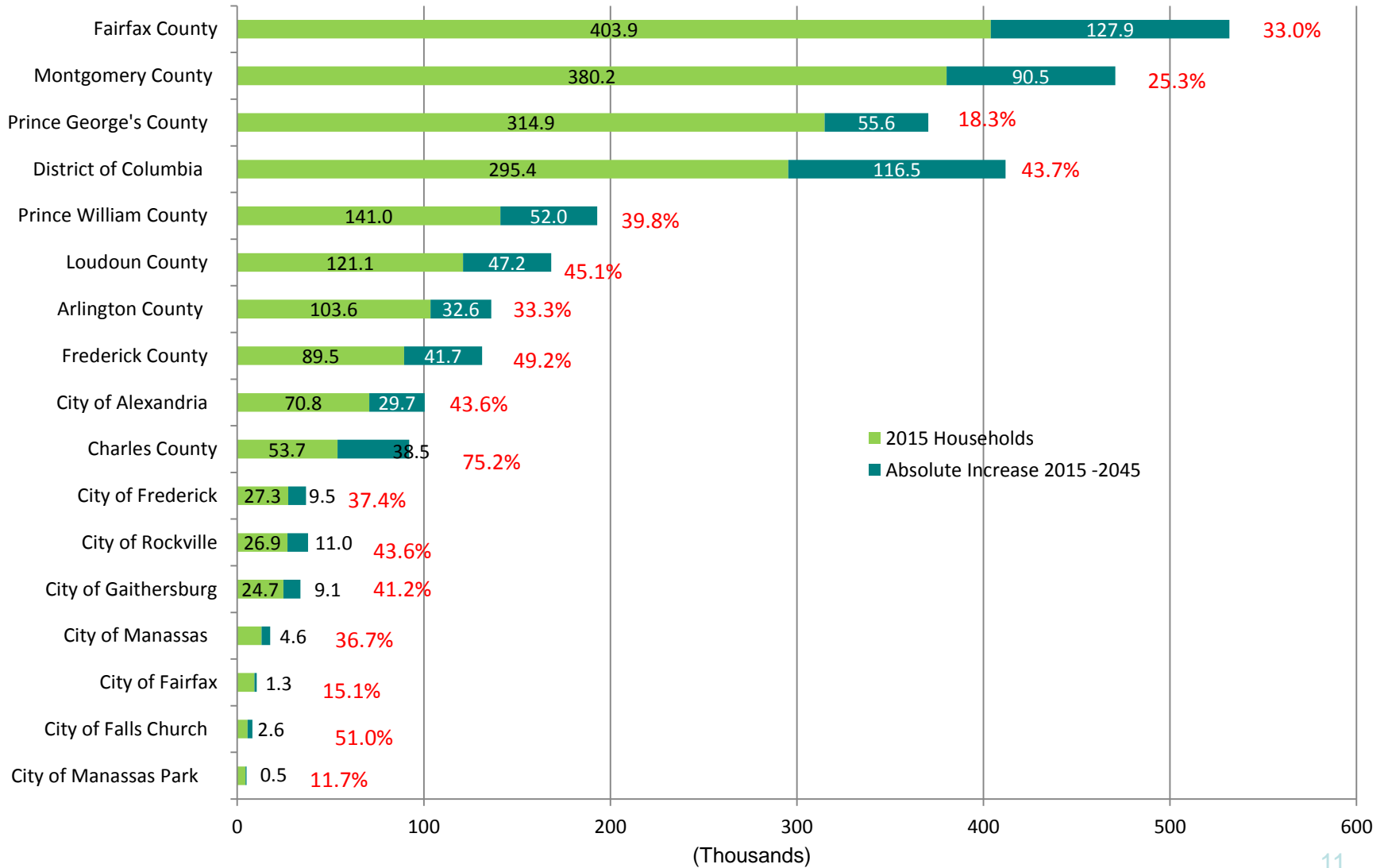
Employment 2015 - 2045



Population 2015 - 2045



Households 2015 - 2045



Questions . . .