ROUND 10.0 GROWTH TRENDS TO 2050

Cooperative Forecasting in Metropolitan Washington

October 2023

Metropolitan Washington Council of Governments

ROUND 10.0 GROWTH TRENDS TO 2050:
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
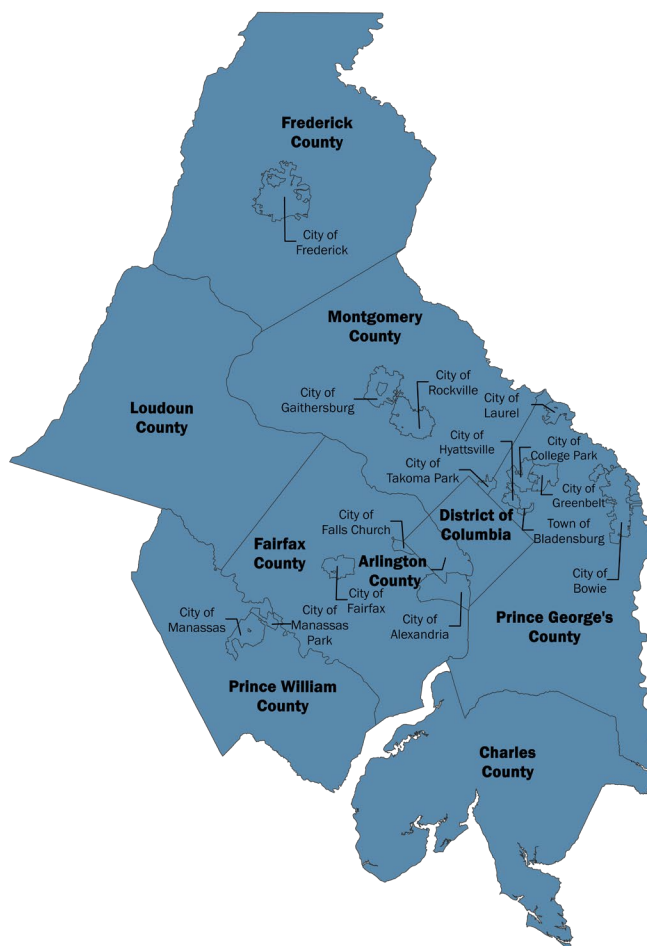
According to the Round 10.0 Cooperative Forecasts, between 2020 and 2050, the region will add more than:

1.4 million people
987,000 jobs
676,000 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
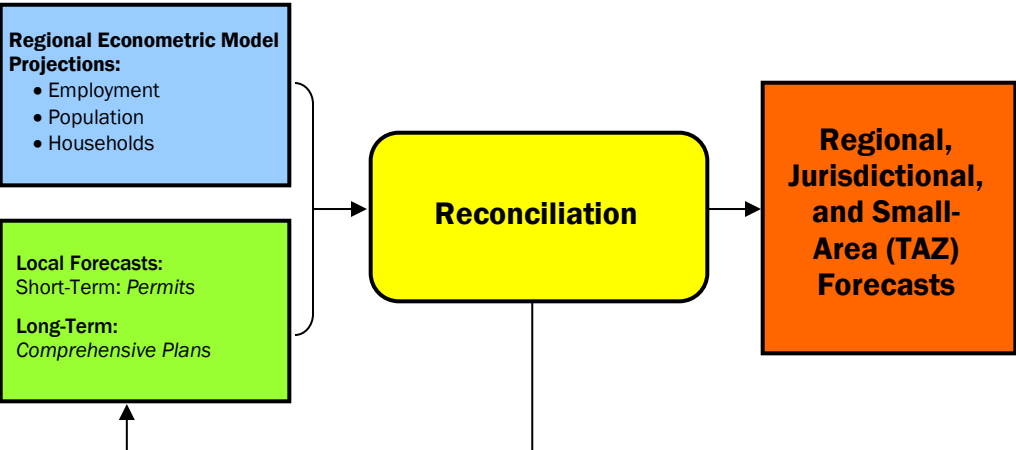
The Cooperative Forecasting and Data Subcommittee, which is comprised of local government planners, economists, and demographers, review and reconcile the two sets of projections. The model and local jurisdictional projections must be within three percent of each other for the new set of Cooperative Forecasts to be reconciled.

The forecasts were presented to and approved by the COG PDTAC (Round 10.0 – April 2023) and the COG Board of Directors (Round 10.0 – June 2023).

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 9.1, Round 9.2, etc.

Table 1: Previous Rounds of Cooperative Forecasts, 1976 - 2023

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	Round 10.0 - 2023

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.

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. (IHS Connect) was examined in anticipation of developing a new regional benchmark total.

For Round 10.0, 2020 was the base year for the employment, population, and households forecast series, again indexed to S&P Global projections for the region. Jurisdictional submissions were provided to COG staff during the September through December 2022 timeframe with TAZ level submissions in December 2022 through May 2023. The initial Census results, the Decennial Census P.L. 94-171 Redistricting Data, were released in August 2021 and are therefore included in Round 10.0 Cooperative Forecasts as part of the development of the 2020 base year.

ECONOMETRIC MODEL

The Round 10.0 Econometric Model is a regional set of employment, population, and households forecasts developed by S&P Global (IHS Connect) and was released in July 2022. Each state is modeled individually and linked to the nation. Net migration (population and household growth) is driven by economic conditions; people will follow jobs. The wage & salary job forecasts are developed by employment sector (for each of the 5-yr. Intervals) for the COG region. The population forecasts are provided by age cohort for the COG region as well. These "benchmark' forecasts to 2050 are the regional growth to which COG member forecasts are reconciled.

Employment

The Round 10.0 Econometric Model projections reveal significant decreases in future employment through 2050 as compared to the Round 9.0 Econometric Model.

Employment in the region will reach 3.7 million jobs by 2050. The region will add about 761,700 Wage & Salary jobs or a 24 percent increase to an existing 2020 base of 3.2 million jobs. When you add Self-Employment and Military (Active Duty) the COG region has an additional 221,000 jobs, the region will have approximately 3.9 million jobs in 2050.

Figure 2: Historic and Forecast Wage & Salary Employment, 1990 to 2050 (Self-Employed and Military Employment not included)
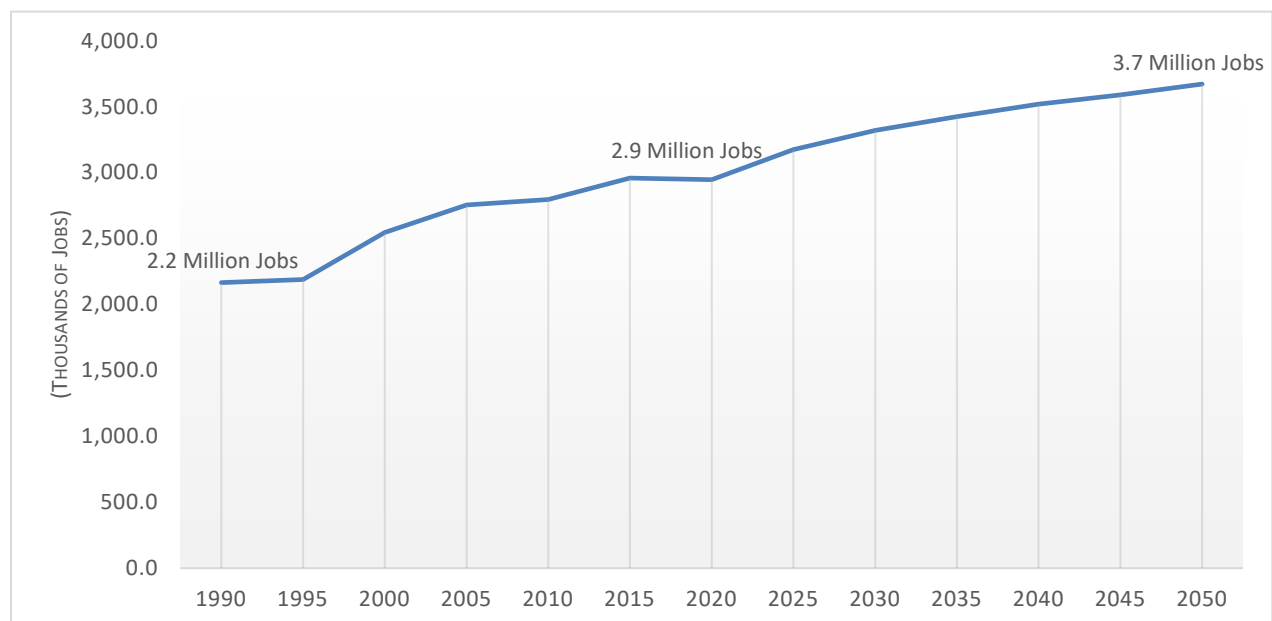
Table 2: Round 10.0 Econometric Model Results – Employment (Thousands)

	2020	2025	2030	2035	2040	2045	2050
Construction, Natural Resources, and Mining	147.2	151.7	153.9	159.7	175.7	192.3	211.7
Manufacturing	47.6	48.9	48.2	47.3	47.5	47.3	47.4
Transportation, Trade, and Utilities	343.0	337.2	330.6	336.0	340.8	342.9	346.7
Information	73.2	81.0	83.1	82.0	85.2	84.4	84.1
Financial Activities	143.8	149.7	145.6	148.7	151.4	152.8	153.8
Professional and Business Services	743.0	760.1	849.1	901.5	948.7	972.1	995.0
Educational and Health Services	391.0	423.9	449.8	475.8	482.6	489.3	497.5
Leisure and Hospitality	216.2	342.8	351.1	344.9	339.4	349.9	361.8
Other Services	183.2	199.2	217.5	227.1	236.0	243.3	247.6
Government	659.0	681.8	693.3	701.5	712.9	716.9	727.0
Federal Government	361.8	366.2	367.0	363.0	365.8	361.8	364.8
State and Local Government	297.1	315.7	326.3	338.6	347.1	355.1	362.2
Total Nonfarm	**2,947.2**	**3,176.3**	**3,322.1**	**3,424.4**	**3,520.1**	**3,590.5**	**3,672.6**
Military (Active Duty)	**37.8**	**37.8**	**37.8**	**37.8**	**37.8**	**37.8**	**37.8**
Self-Employed	**147.4**	**158.8**	**166.1**	**171.2**	**176.0**	**179.5**	**183.6**
Total Employment	**3,132.3**	**3,372.9**	**3,525.9**	**3,633.4**	**3,733.9**	**3,807.8**	**3,894.0**

Figure 3: Round 10.0 Econometric Model Change in Employment Sectors 2020 – 2050 (Thousands)
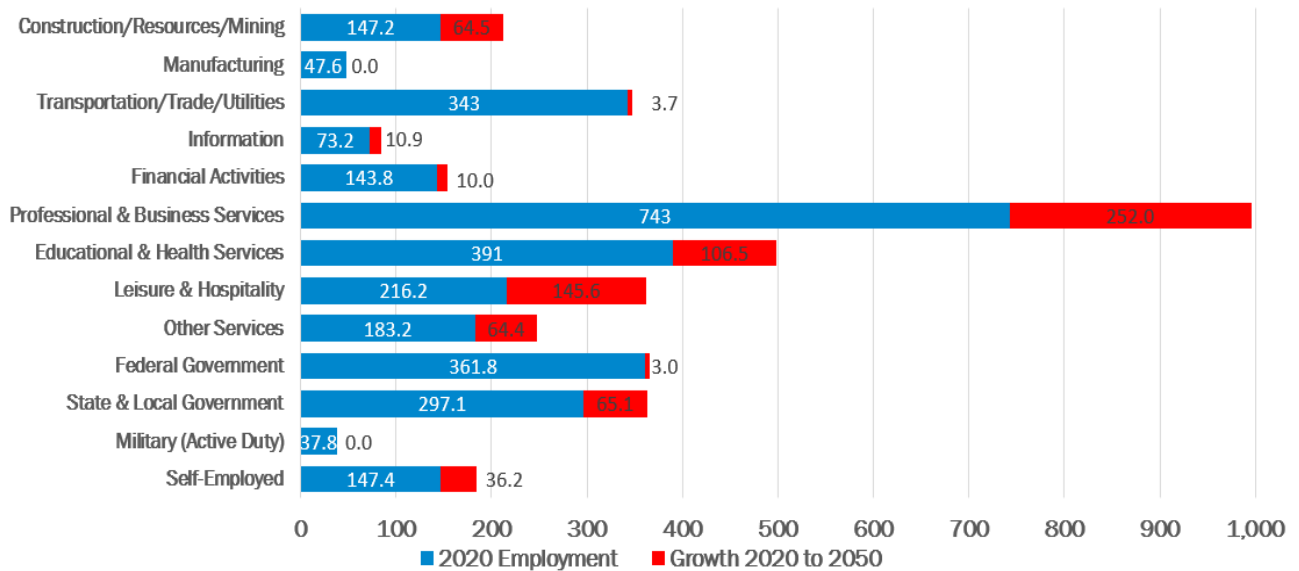
Population and Households

The population in the region will reach nearly 6.8 million people by 2050. The region will add 1.1 million people to an existing 2020 total of 5.7 million people, or a 19 percent increase.

The region will have 2.8 million households by 2050, an additional 704,000 households to an existing 2020 total of 2.1 million households, or a 33 percent increase.

Table 3: Round 10.0 Econometric Model Results – Total Population and Households (Thousands)

	2020	2025	2030	2035	2040	2045	2050
Total Population	5,701.5	5,767.8	6,000.1	6,241.7	6,448.9	6,636.7	6,809.5
Heads of Households	2,121.3	2,209.5	2,331.6	2,462.7	2,588.2	2,708.5	2,225.6

Figure 4: Historic and Forecast Population, 1990 to 2050
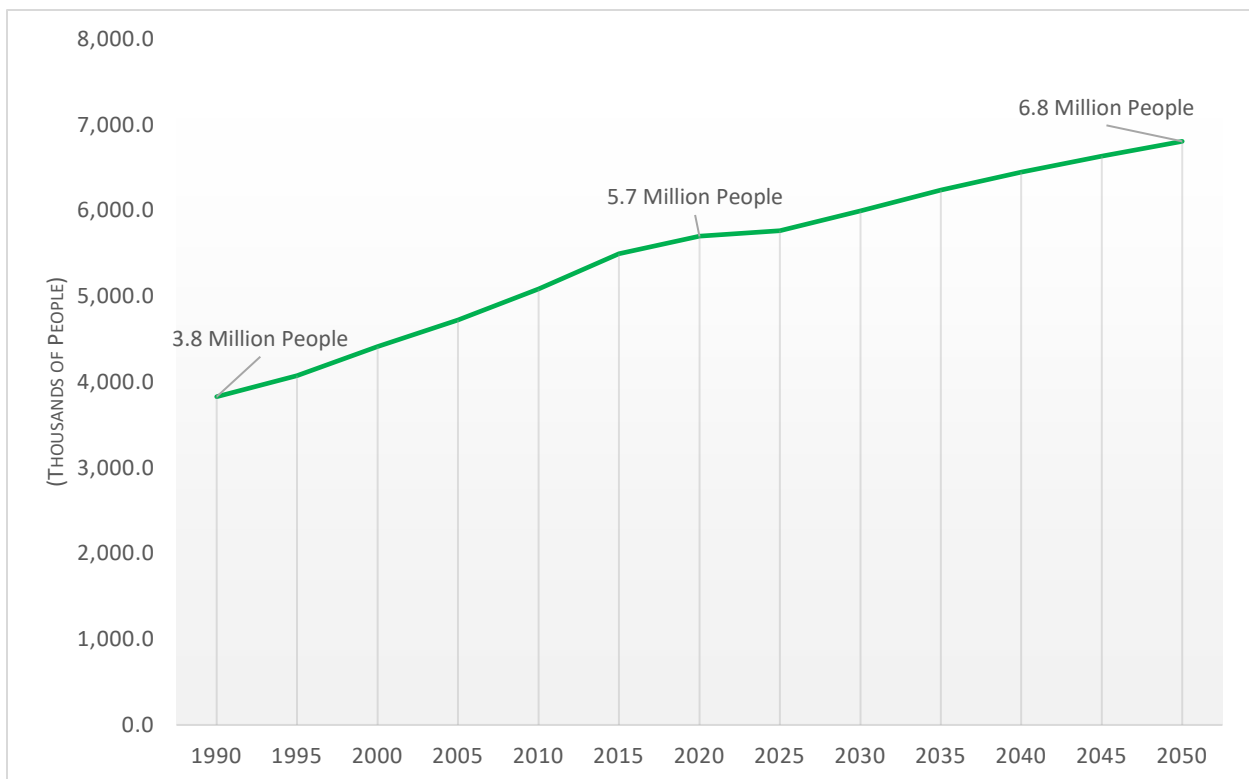
Figure 5: Share of 2020 to 2050 Population Growth by Age Cohort
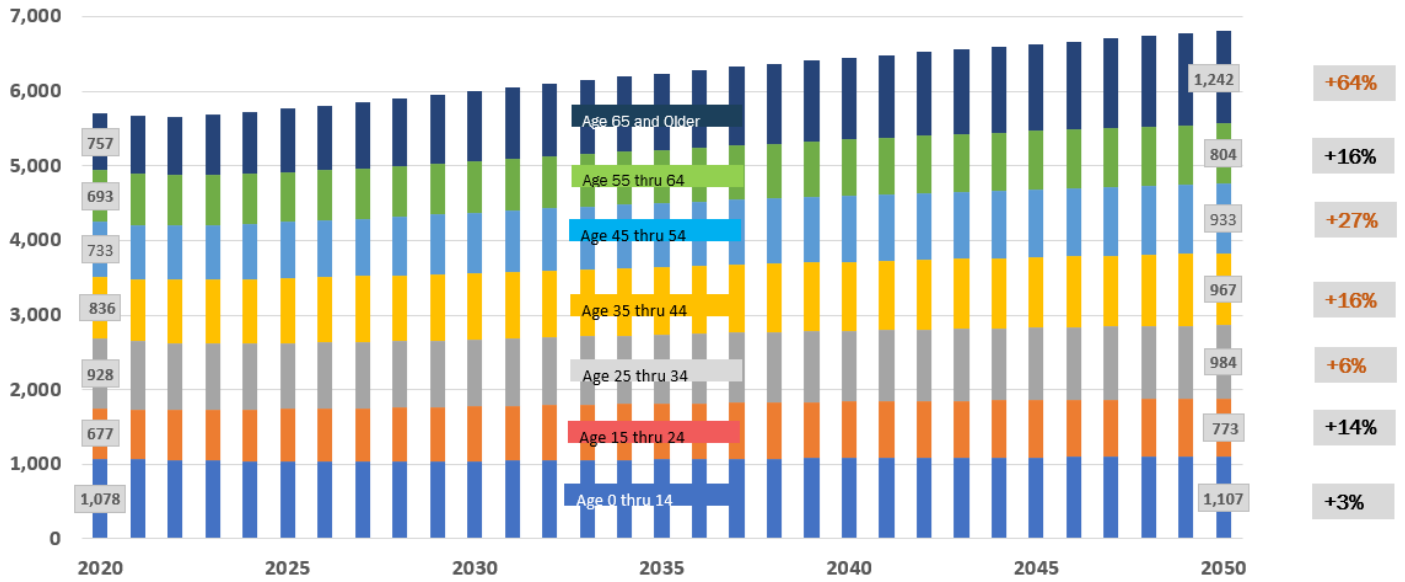
Figure 6: Historic and Forecast Households, 1990 to 2050
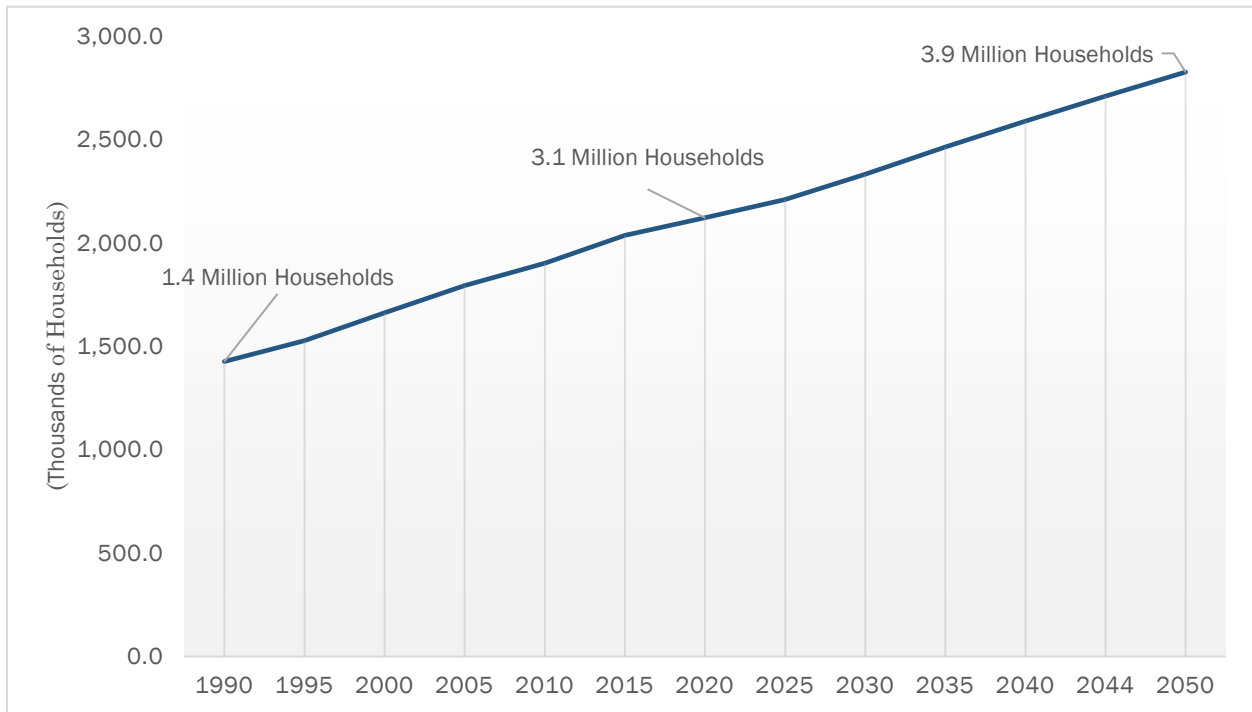
ROUND 10.0 COOPERATIVE FORECAST TECHNICAL ASSISTANCE

During the spring of 2022, COG and TPB staff requested the support of an outside consultant to provide technical assistance to help answer and understand the potential short-term and long-term impacts of the COVID-19 pandemic on growth assumptions related to the Round 10.0 Cooperative Forecast. The consultant, ICF, provided assistance to:

- Better understand the impact of the COVID-19 pandemic on utilization, density, and development of commercial office space in the region;
- Develop a "range" of potential regional forecasts to 2050 given ongoing economic uncertainties;
- Access emerging trends in regional housing location and choice; and
- Increase understanding of future regional household size trends (ICF Technical Memo, page 2)

Figure 7: ICF Estimate of Regional Employment Change due to COVID (Thousands)
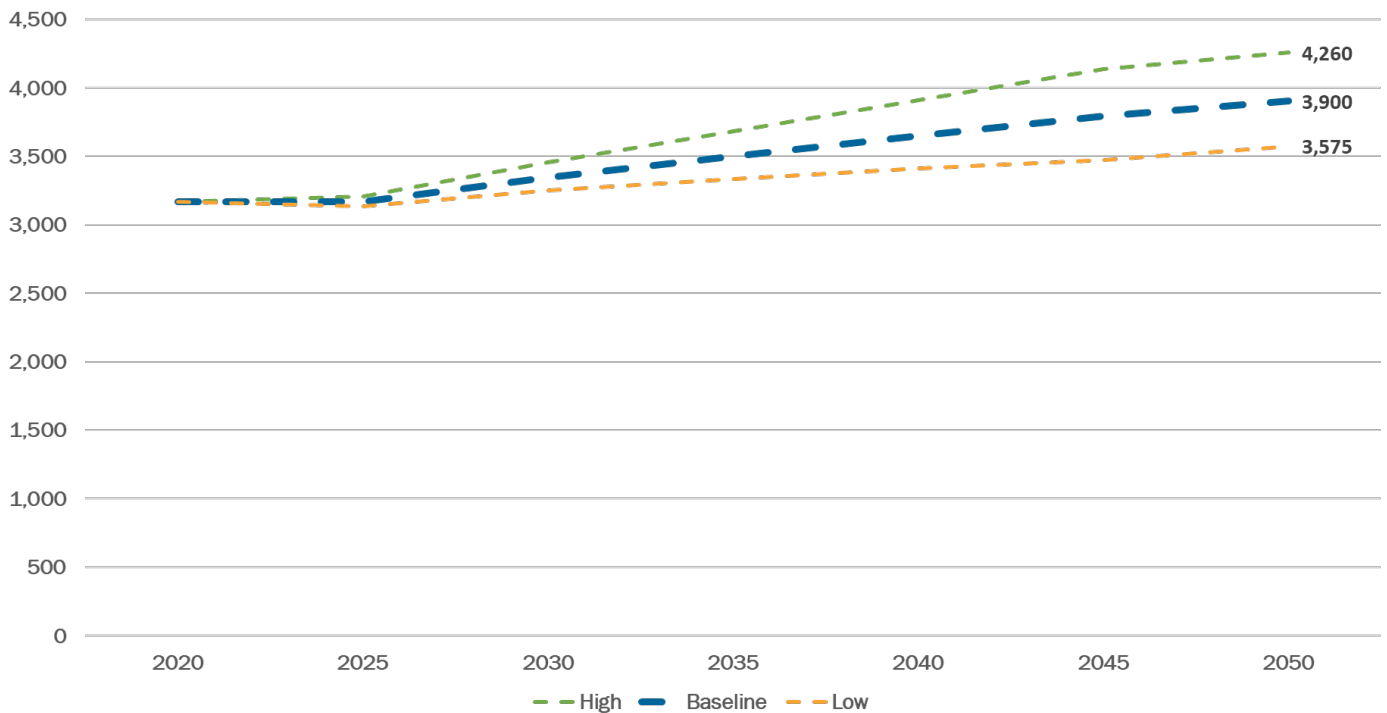
Figure 8: ICF Estimate of Regional Population Change due to COVID (Thousands)

Figure 8 data labels: 7,460 (High); 6,840 (Baseline); 6,260 (Low)

Legend: High · Baseline · Low
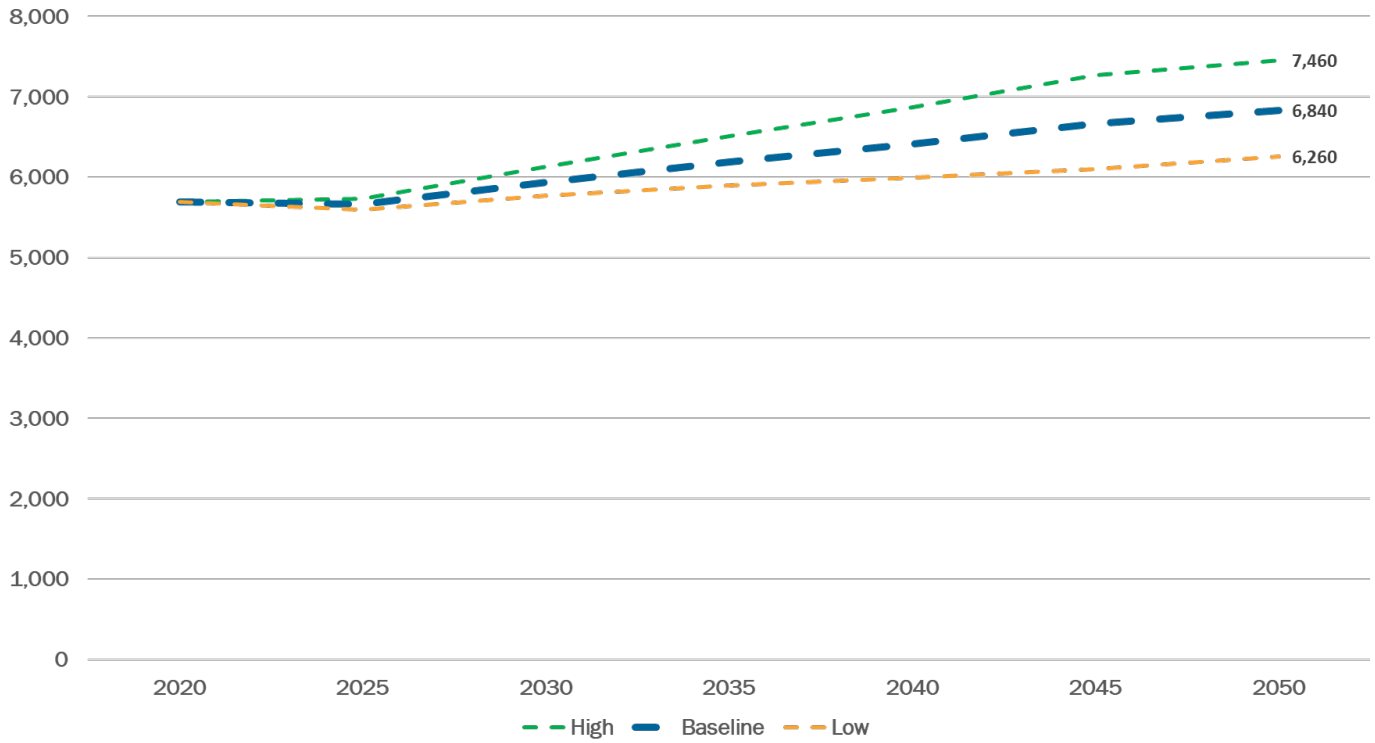
Figure 9: ICF Estimate of Regional Households Change due to COVID (Thousands)

Figure 9 data labels: 2,973 (High); 2.725 (Baseline); 2,500 (Low)

Legend: High · Baseline · Low
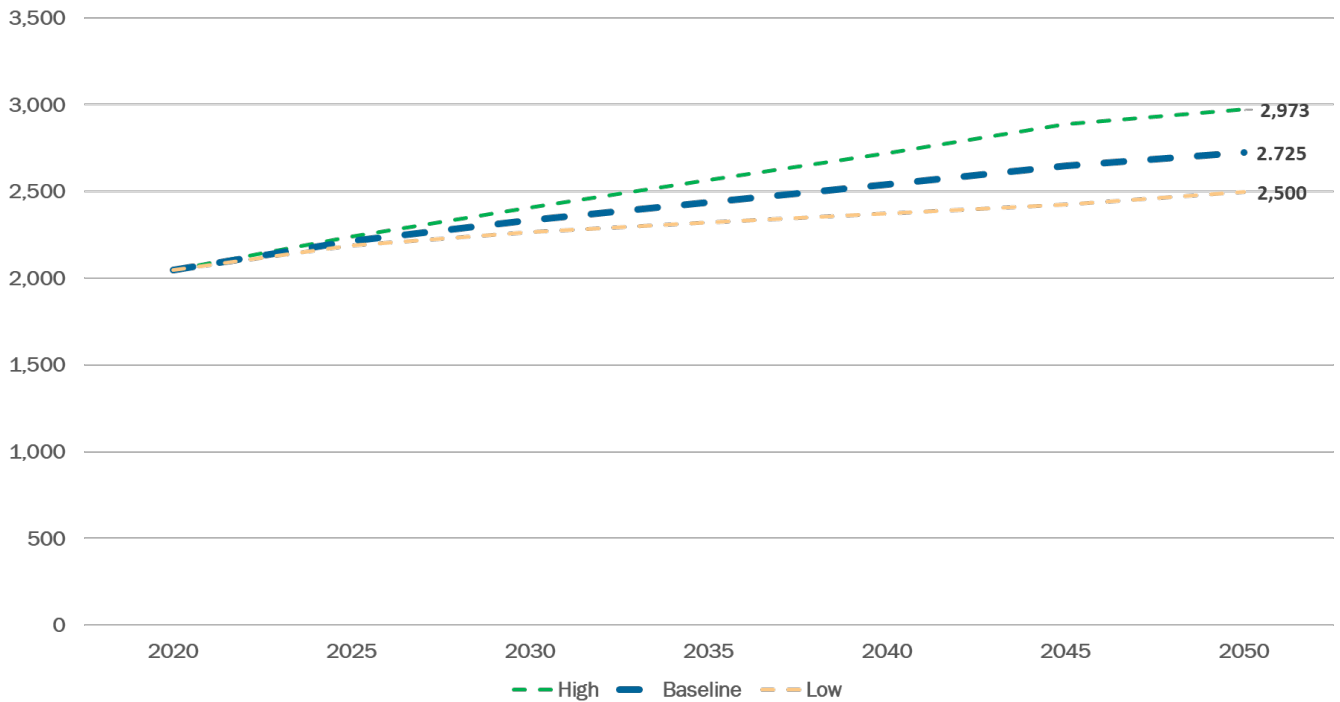
JURISDICTIONAL FORECASTS

Employment

Job growth in Northern Virginia (32 percent) will outpace the growth anticipated in Maryland jurisdictions (31 percent), and the District of Columbia (30 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 2050 forecast period, followed by Prince George's and Prince William counties.

Collectively, the region's inner suburbs will add the largest number of new jobs, 427,700 by 2050. 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 240,500 jobs to the region's base, increasing their total number of jobs 24 percent by 2045. Despite the tremendous growth in suburban employment shown in the forecasts, the District of Columbia will continue to have the largest number of jobs of any single jurisdiction and would account for about a fifth of the region's employment in 2050. Collectively, the Central Jurisdictions will account for 32 percent of regional employment.

Table 4: Summary of Employment Forecasts Round 10.0 Cooperative Forecasts (Thousands)

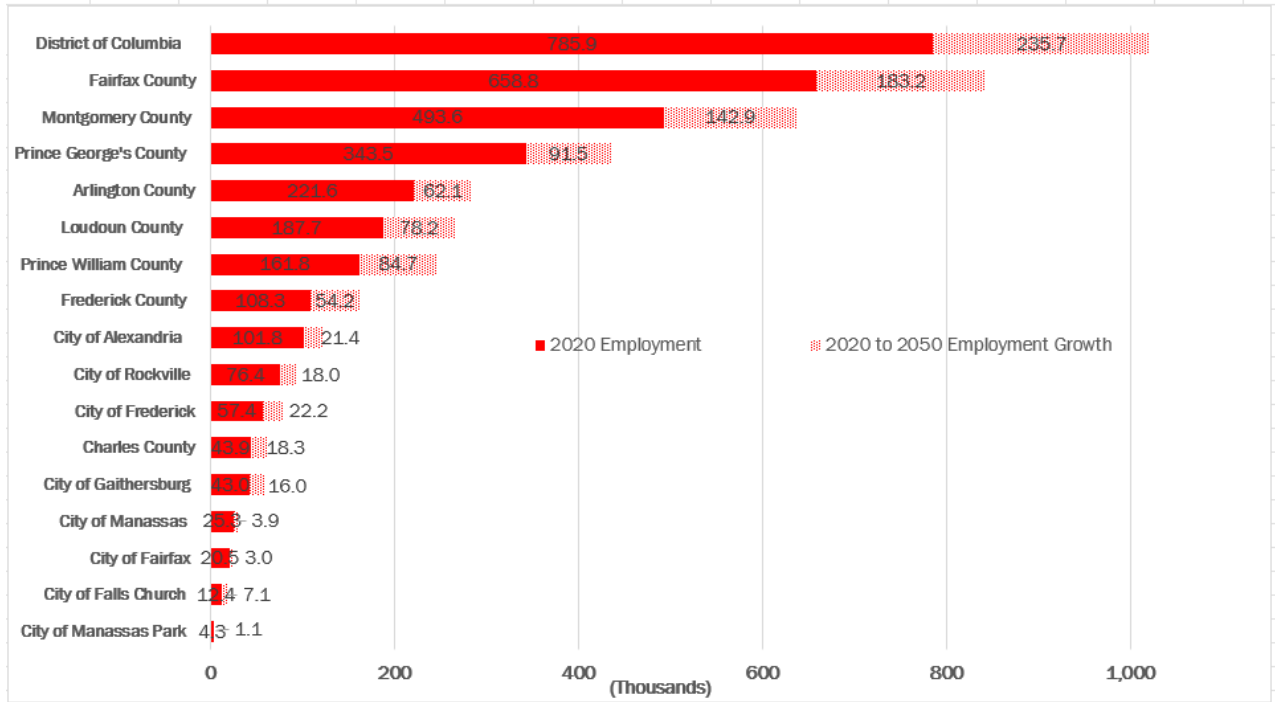| JURISDICTION	Round 10.0 Base Year 2020	2025	2030	2035	2040	2045	2050	2020 to 2050 Growth Number	% Change	Share
District of Columbia	785.9	846.1	886.3	923.5	954.4	989.0	1,021.6	235.7	30.0%	23.9%
Arlington County	221.6	223.2	236.7	259.2	266.4	275.3	283.7	62.1	28.0%	6.3%
City of Alexandria	101.8	101.0	99.3	106.6	112.8	116.8	123.2	21.4	21.1%	2.2%
Central Jurisdictions	**1,109.3**	**1,170.2**	**1,222.2**	**1,289.3**	**1,333.5**	**1,381.2**	**1,428.5**	**319.2**	**28.8%**	**32.3%**
Montgomery County	493.6	522.9	545.6	568.3	591.0	613.8	636.5	142.9	29.0%	14.5%
City of Rockville (1)	76.4	78.7	81.1	83.8	87.8	91.1	94.5	18.0	23.6%	1.8%
City of Gaithersburg (1)	43.0	48.0	52.0	54.5	56.5	58.0	59.0	16.0	37.2%	1.6%
Prince George's County	343.5	356.7	366.8	381.9	396.7	416.0	435.0	91.5	26.6%	9.3%
Fairfax County	658.8	690.5	750.8	788.8	812.5	832.0	842.0	183.2	27.8%	18.6%
City of Fairfax	20.5	22.0	22.3	22.6	22.9	23.2	23.5	3.0	14.6%	0.3%
City of Falls Church	12.4	13.1	15.4	16.5	17.4	18.3	19.4	7.1	57.0%	0.7%
Inner Suburbs	**1,528.7**	**1,605.2**	**1,700.9**	**1,778.1**	**1,840.6**	**1,903.2**	**1,956.4**	**427.7**	**28.0%**	**43.3%**
Loudoun County	187.7	210.3	227.0	240.8	251.5	258.7	265.8	78.2	41.7%	7.9%
Prince William County	161.8	178.6	194.4	209.7	223.4	235.6	246.4	84.7	52.3%	8.6%
City of Manassas	25.3	26.1	26.9	27.7	28.3	28.8	29.3	3.9	15.5%	0.4%
City of Manassas Park	4.3	4.7	5.0	5.1	5.2	5.3	5.4	1.1	25.5%	0.1%
Charles County	43.9	46.1	49.8	54.0	57.4	60.0	62.2	18.3	41.8%	1.9%
Frederick County	108.3	115.6	123.8	132.5	141.8	151.8	162.5	54.2	50.1%	5.5%
City of Frederick (2)	57.4	60.1	64.4	67.6	69.5	74.4	79.6	22.2	38.7%	2.3%
Outer Suburbs	**531.3**	**581.4**	**626.8**	**669.9**	**707.7**	**740.2**	**771.7**	**240.5**	**45.3%**	**24.4%**
Virginia Jurisdictions	**1,394.2**	**1,469.5**	**1,577.7**	**1,677.0**	**1,740.4**	**1,794.0**	**1,838.9**	**444.7**	**31.9%**	**45.0%**
Maryland Jurisdictions	**989.2**	**1,041.3**	**1,086.0**	**1,136.8**	**1,187.0**	**1,241.6**	**1,296.2**	**307.0**	**31.0%**	**31.1%**
COG REGION	**3,169.2**	**3,356.9**	**3,549.9**	**3,737.3**	**3,881.7**	**4,024.6**	**4,156.6**	**987.4**	**31.2%**	**100.0%**

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

Figure 10: Employment Growth by Jurisdiction, 2020 to 2050 (Thousands)

Jurisdiction	2020 Employment	2020 to 2050 Employment Growth
District of Columbia	785.9	235.7
Fairfax County	658.8	183.2
Montgomery County	493.6	142.9
Prince George's County	343.5	91.5
Arlington County	221.6	62.1
Loudoun County	187.7	78.2
Prince William County	161.8	84.7
Frederick County	108.3	54.2
City of Alexandria	101.8	21.4
City of Rockville	76.4	18.0
City of Frederick	57.4	22.2
Charles County	43.8	18.3
City of Gaithersburg	43.0	16.0
City of Manassas	25.3	3.9
City of Fairfax	20.5	3.0
City of Falls Church	12.4	7.1
City of Manassas Park	4.3	1.1

Figure 11: Percent Change in Employment by Jurisdiction, 2020 to 2050

Jurisdiction	Percent Change
District of Columbia	30%
Fairfax County	28%
Montgomery County	29%
Prince George's County	27%
Arlington County	28%
Loudoun County	42%
Prince William County	52%
Frederick County	50%
City of Alexandria	21%
City of Rockville	24%
City of Frederick	39%
Charles County	42%
City of Gaithersburg	37%
City of Manassas	15%
City of Fairfax	15%
City of Falls Church	57%
City of Manassas Park	26%

Figure 12: 2020 Employment and Projected 2020 to 2050 Employment Growth
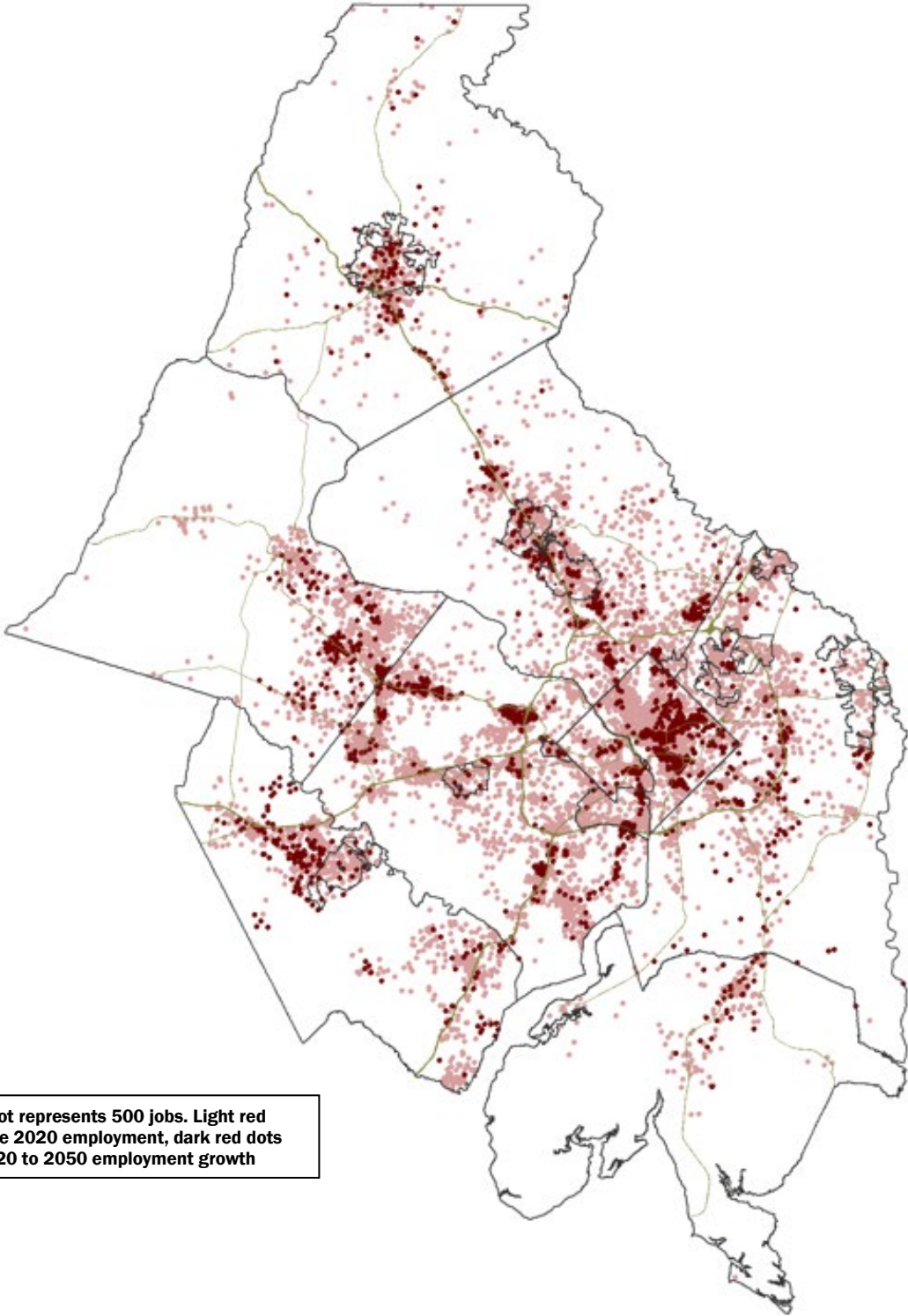
Note: One dot represents 500 jobs. Light red dots indicate 2020 employment, dark red dots indicate 2020 to 2050 employment growth

Households

The addition of more than 676,300 households during the 2020 to 2050 forecast period reflects the growth in jobs and in-migration to the region. The largest number of new households will be in the District of Columbia, Fairfax County, and Montgomery County, which collectively contribute almost half of the household growth during the forecast period. The City of Falls Church will grow at a rate of 109 percent, the most rapidly of all jurisdictions, adding about 6,300 households to the 2020 total of 5,800.

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 10.0 Cooperative Forecasts (Thousands)

JURISDICTION	Round 10.0 Base Year 2020	2025	2030	2035	2040	2045	2050	2020 to 2050 Growth Number	% Change	Share
District of Columbia	312.4	344.2	366.8	386.6	407.6	426.0	441.4	129.0	41.3%	19.1%
Arlington County	109.9	118.2	126.2	133.3	140.0	146.9	153.6	43.7	39.8%	6.5%
City of Alexandria	75.6	85.7	96.4	106.7	115.4	122.0	126.0	50.5	66.8%	7.5%
Central Jurisdictions	**497.9**	**548.1**	**589.4**	**626.6**	**663.1**	**695.0**	**721.1**	**223.2**	**44.8%**	**33.0%**
Montgomery County	386.6	398.4	416.5	434.1	450.0	463.2	474.3	87.7	22.7%	13.0%
City of Rockville (1)	28.2	29.9	31.7	33.7	35.8	38.1	40.6	12.4	43.8%	1.8%
City of Gaithersburg (1)	25.9	27.2	28.9	30.3	31.7	33.0	34.2	8.3	32.0%	1.2%
Prince George's County	342.2	353.7	367.4	385.9	400.5	413.7	425.9	83.7	24.5%	12.4%
Fairfax County	417.5	431.5	451.2	467.1	482.4	497.5	510.8	93.3	22.4%	13.8%
City of Fairfax	9.3	10.6	13.0	13.8	14.6	15.4	16.3	6.9	74.3%	1.0%
City of Falls Church	5.8	7.3	8.7	9.6	10.3	11.1	12.1	6.3	108.5%	0.9%
Inner Suburbs	**1,161.5**	**1,201.6**	**1,256.9**	**1,310.5**	**1,358.0**	**1,400.9**	**1,439.4**	**277.9**	**23.9%**	**41.1%**
Loudoun County	137.4	148.9	161.7	169.5	174.7	178.2	181.7	44.3	32.2%	6.5%
Prince William County	153.9	165.0	173.4	180.0	185.1	189.0	191.9	38.0	24.7%	5.6%
City of Manassas	14.0	14.3	15.1	15.5	15.8	16.1	16.4	2.4	17.5%	0.4%
City of Manassas Park	5.4	6.2	6.9	7.1	7.4	7.7	8.0	2.6	47.9%	0.4%
Charles County	59.1	64.3	71.2	75.3	80.0	85.2	89.7	30.6	51.8%	4.5%
Frederick County	98.4	106.2	114.5	123.5	133.2	144.3	155.7	57.3	58.3%	8.5%
City of Frederick (2)	31.8	34.1	36.3	38.7	40.9	43.3	45.6	13.8	43.3%	2.0%
Outer Suburbs	**468.1**	**504.9**	**542.7**	**571.0**	**596.2**	**620.4**	**643.3**	**175.2**	**37.4%**	**25.9%**
Virginia Jurisdictions	**928.8**	**987.7**	**1,052.5**	**1,102.6**	**1,145.8**	**1,184.0**	**1,216.8**	**288.0**	**31.0%**	**42.6%**
Maryland Jurisdictions	**886.3**	**922.6**	**969.7**	**1,018.8**	**1,063.7**	**1,106.3**	**1,145.6**	**259.3**	**29.3%**	**38.3%**
COG REGION	**2,127.5**	**2,254.5**	**2,389.0**	**2,508.1**	**2,617.2**	**2,716.3**	**2,803.8**	**676.3**	**31.8%**	**100.0%**

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

Figure 13: Household Growth by Jurisdiction, 2020 to 2050 (Thousands)
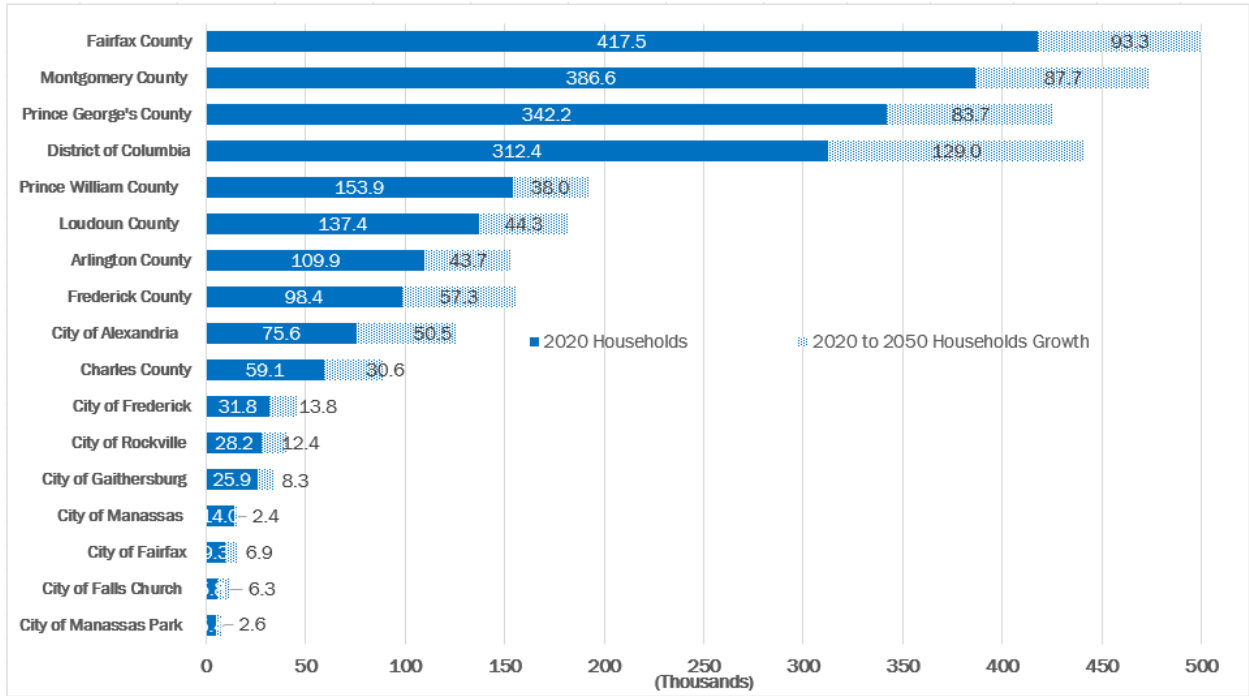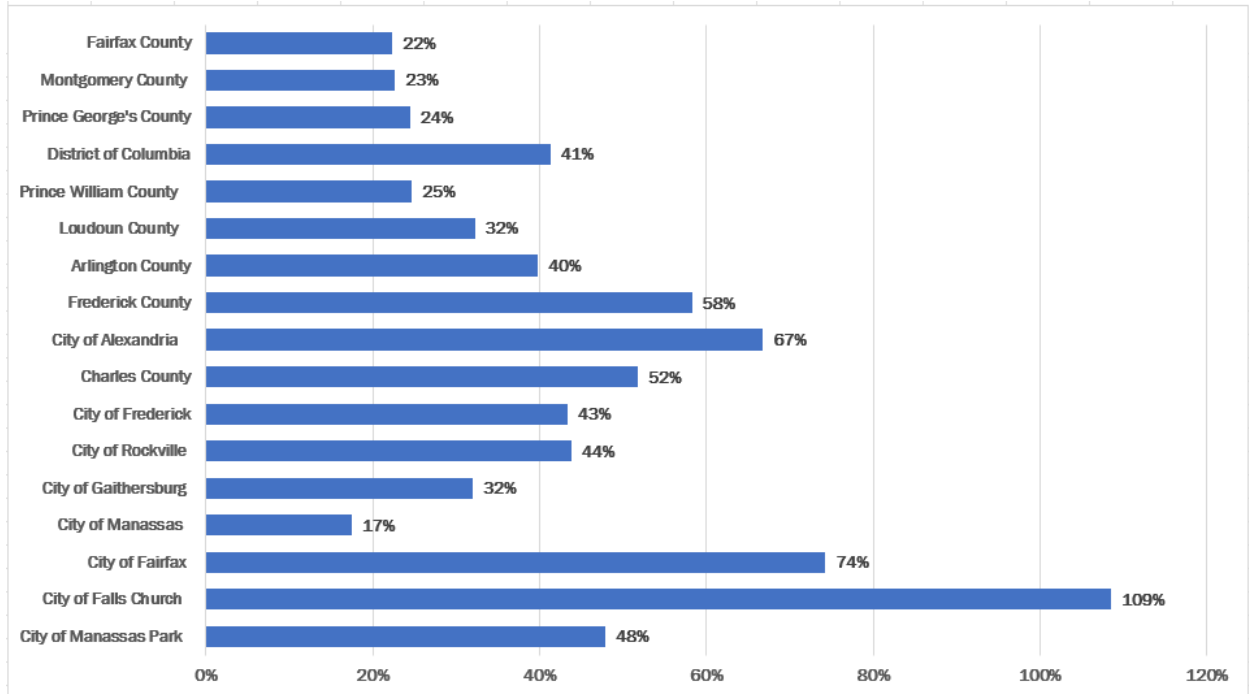
Jurisdiction	2020 Households	2020 to 2050 Households Growth
Fairfax County	417.5	93.3
Montgomery County	386.6	87.7
Prince George's County	342.2	83.7
District of Columbia	312.4	129.0
Prince William County	153.9	38.0
Loudoun County	137.4	44.3
Arlington County	109.9	43.7
Frederick County	98.4	57.3
City of Alexandria	75.6	50.5
Charles County	59.1	30.6
City of Frederick	31.8	13.8
City of Rockville	28.2	12.4
City of Gaithersburg	25.9	8.3
City of Manassas	14.0	2.4
City of Fairfax	9.3	6.9
City of Falls Church		6.3
City of Manassas Park		2.6

(Thousands)

Figure 14: Percent Change in Households by Jurisdiction, 2020 to 2050

Jurisdiction	Percent Change
Fairfax County	22%
Montgomery County	23%
Prince George's County	24%
District of Columbia	41%
Prince William County	25%
Loudoun County	32%
Arlington County	40%
Frederick County	58%
City of Alexandria	67%
Charles County	52%
City of Frederick	43%
City of Rockville	44%
City of Gaithersburg	32%
City of Manassas	17%
City of Fairfax	74%
City of Falls Church	109%
City of Manassas Park	48%

Figure 15: 2020 Households and Projected 2020 to 2050 Household Growth
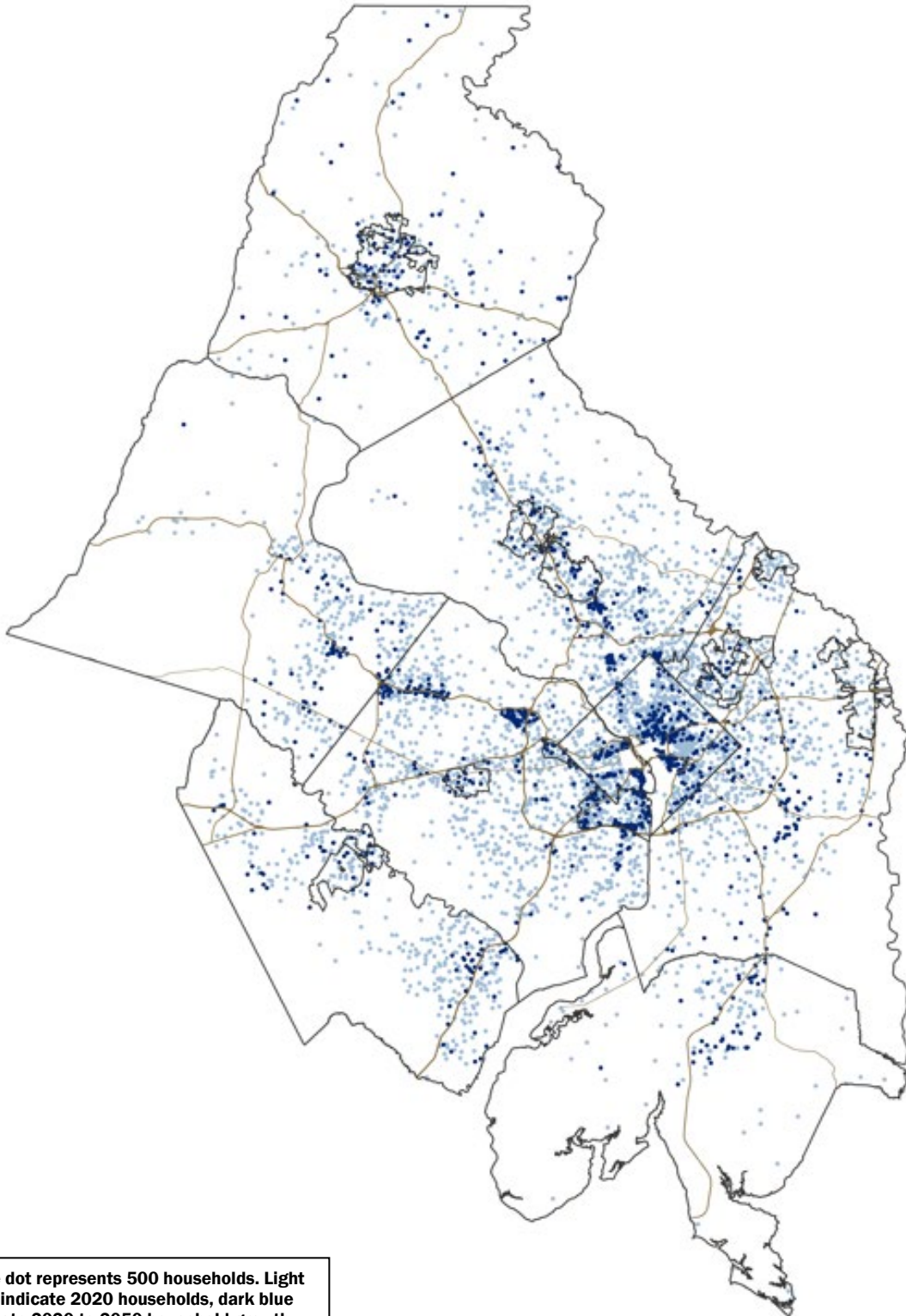
Note: One dot represents 500 households. Light blue dots indicate 2020 households, dark blue dots indicate 2020 to 2050 household growth

Population

The region's population is expected to grow steadily through the forecast period, adding an average of approximately 48,300 persons a year. Population will be influenced by the region's economy, rate of in-migration and international immigration, and possible decline in average household size.

Most of the population growth will occur in Prince George's, Fairfax, and Montgomery counties. The outer jurisdictions will experience the fastest rates of growth, led by Frederick County (58 percent), Charles County (44 percent), and the City of Frederick (34 percent). The region's Central Jurisdictions will also grow. In the District of Columbia, population will increase by 23 percent during the forecast period. In the City of Alexandria and Arlington County, population will increase by 64 and 30 percent, respectively.

Table 6: Summary of Population Forecasts Round 10.0 Cooperative Forecasts (Thousands)

JURISDICTION	Round 10.0 Base Year 2020	2025	2030	2035	2040	2045	2050	2020 to 2050 Growth Number	% Change	Share
District of Columbia	689.5	697.7	728.6	757.2	787.1	816.4	844.4	154.9	22.5%	10.7%
Arlington County	238.6	245.8	260.2	272.9	285.2	298.0	311.2	72.6	30.4%	5.0%
City of Alexandria	159.5	180.5	202.0	222.2	239.8	252.9	261.9	102.4	64.2%	7.1%
Central Jurisdictions	**1,087.7**	**1,124.0**	**1,190.8**	**1,252.3**	**1,312.2**	**1,367.3**	**1,417.5**	**329.8**	**30.3%**	**22.7%**
Montgomery County	1,061.2	1,083.0	1,118.0	1,153.9	1,189.6	1,222.2	1,250.7	189.4	17.8%	13.1%
City of Rockville (1)	67.8	70.9	74.6	78.7	82.9	87.5	92.7	24.9	36.8%	1.7%
City of Gaithersburg (1)	69.7	72.5	75.7	78.5	81.2	83.7	85.8	16.1	23.2%	1.1%
Prince George's County	967.2	997.8	1,033.0	1,081.7	1,122.7	1,159.6	1,193.8	226.5	23.4%	15.6%
Fairfax County	1,171.9	1,202.4	1,247.5	1,283.7	1,319.0	1,353.6	1,384.0	212.1	18.1%	14.6%
City of Fairfax	24.1	27.8	32.7	34.4	36.1	37.8	39.6	15.4	63.8%	1.1%
City of Falls Church	14.7	15.5	18.0	19.6	20.7	21.8	23.3	8.6	58.8%	0.6%
Inner Suburbs	**3,239.1**	**3,326.5**	**3,449.1**	**3,573.3**	**3,688.1**	**3,795.0**	**3,891.2**	**652.1**	**20.1%**	**45.0%**
Loudoun County	421.0	456.2	493.9	515.5	529.6	539.2	548.5	127.6	30.3%	8.8%
Prince William County	483.8	515.2	536.6	553.0	565.0	573.7	579.6	95.7	19.8%	6.6%
City of Manassas	42.8	43.7	46.3	47.6	48.5	49.5	50.4	7.7	17.9%	0.5%
City of Manassas Park	17.2	19.0	20.4	20.9	21.4	21.9	22.4	5.2	30.3%	0.4%
Charles County	168.0	176.3	193.6	203.8	216.5	230.4	242.7	74.6	44.4%	5.1%
Frederick County	271.7	293.2	316.3	341.3	368.3	397.4	428.8	157.1	57.8%	10.8%
City of Frederick (2)	78.2	83.8	89.5	95.1	100.8	106.4	112.0	33.9	43.3%	2.3%
Outer Suburbs	**1,404.5**	**1,503.7**	**1,607.3**	**1,682.2**	**1,749.5**	**1,812.2**	**1,872.4**	**467.9**	**33.3%**	**32.3%**
Virginia Jurisdictions	**2,573.5**	**2,706.2**	**2,857.6**	**2,969.8**	**3,065.4**	**3,148.4**	**3,220.8**	**647.3**	**25.2%**	**44.6%**
Maryland Jurisdictions	**2,468.2**	**2,550.3**	**2,661.0**	**2,780.8**	**2,897.2**	**3,009.6**	**3,115.9**	**647.7**	**26.2%**	**44.7%**
COG REGION	**5,731.3**	**5,954.2**	**6,247.2**	**6,507.8**	**6,749.7**	**6,974.5**	**7,181.1**	**1,449.8**	**25.3%**	**100.0%**

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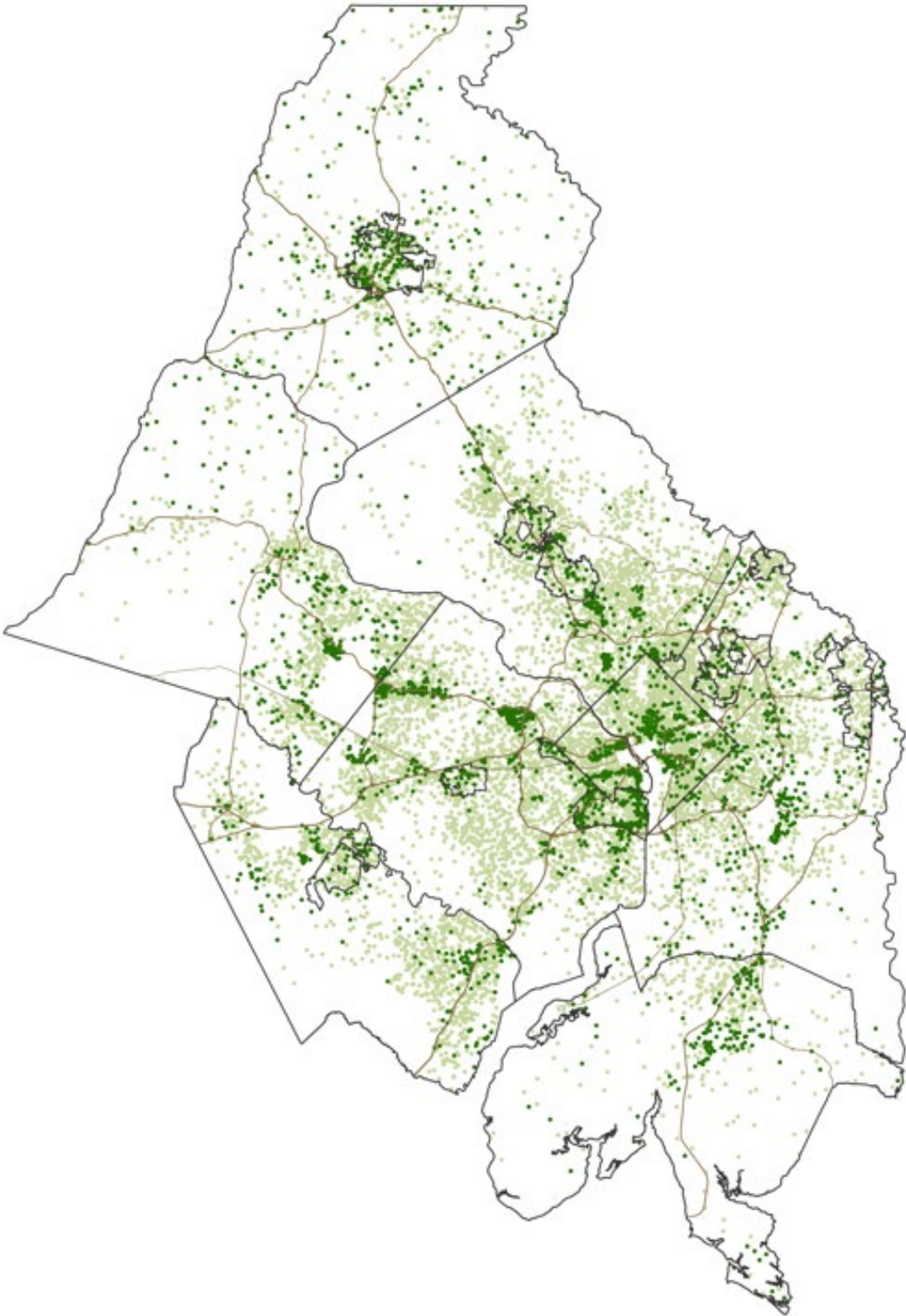> (2) Included in the Frederick County total.

Figure 16: Population Growth by Jurisdiction, 2020 to 2050 (Thousands)
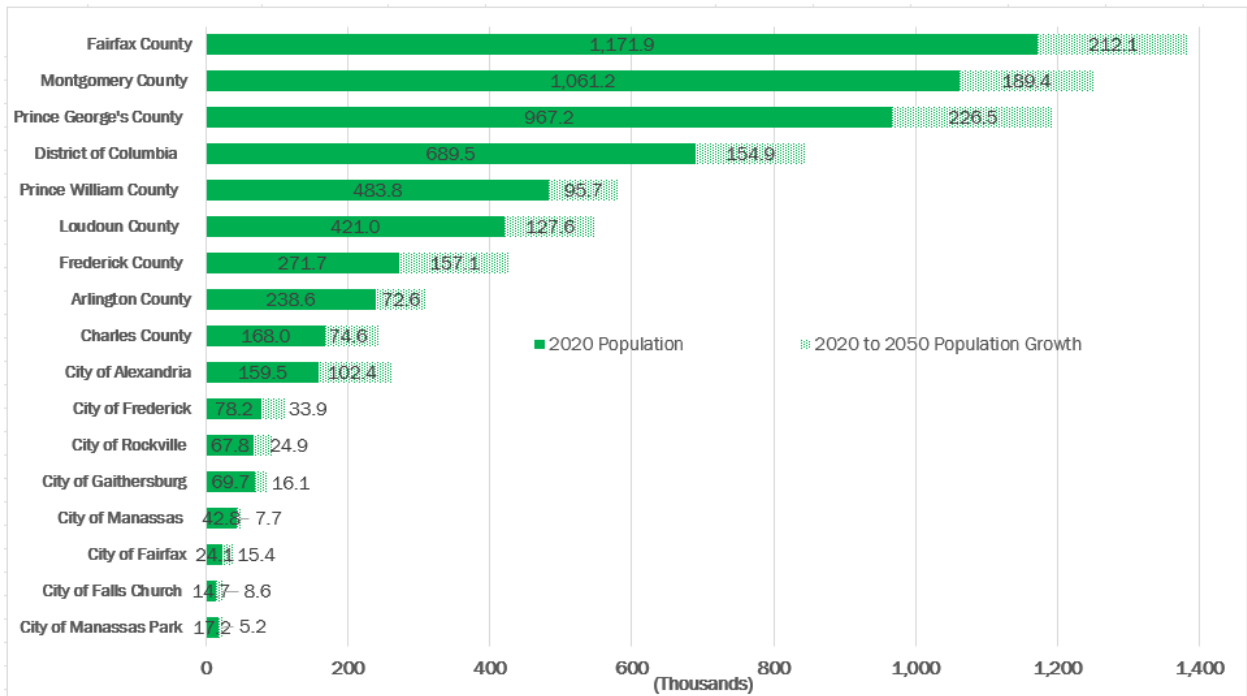
Figure 17: Percent Change in Population Growth by Jurisdiction, 2020 to 2050
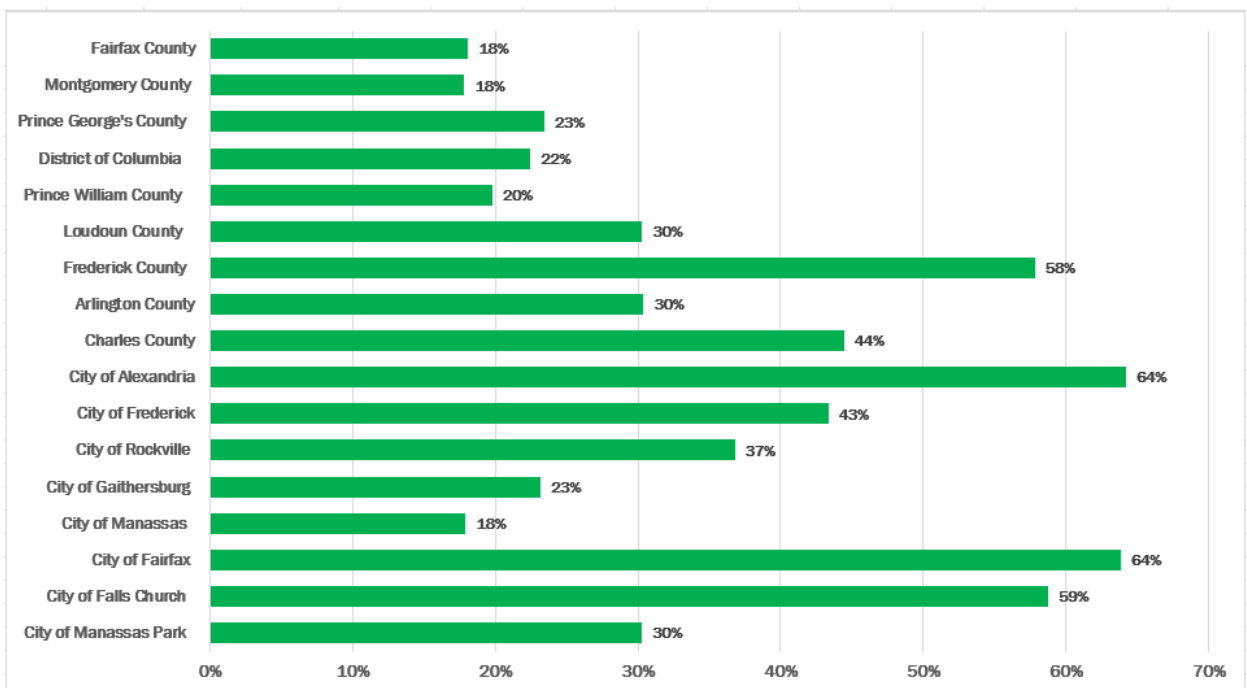
Figure 18: 2020 Population and Projected 2020 to 2050 Population Growth

Note: One dot represents 500 people. Light green dots indicate 2020 population, dark green dots indicate 2020 to 2050 population growth
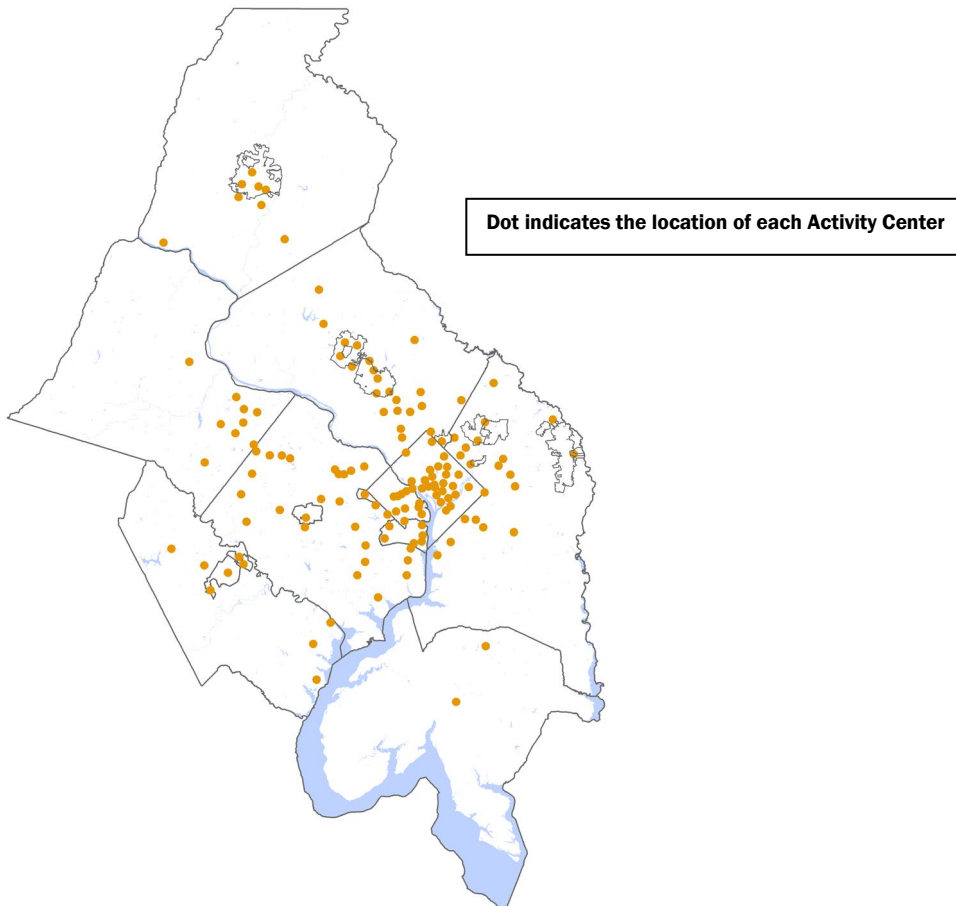
REGIONAL ACTIVITY CENTERS

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.
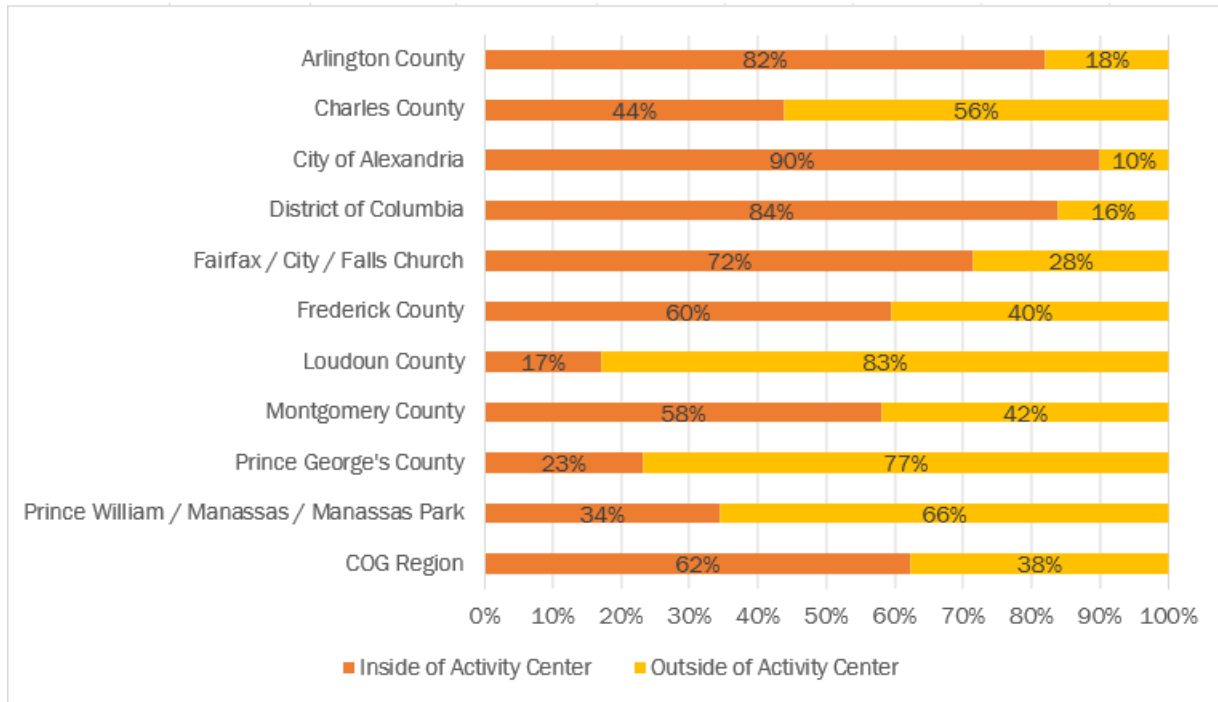
The Region Forward Coalition established a target for the region to capture 75 percent of the square footage of new commercial construction and 50 percent of new households in Regional Activity Centers. Based on the new Round 10.0 Cooperative Forecasts, in 2020, 62 percent of the region's jobs were located in Regional Activity Centers. During the 2020 and 2050 forecast period, 72 percent of job growth will be concentrated in Activity Centers. The highest percentage of jobs located in Regional Activity Centers in 2050 will be found in the Central Jurisdictions: City of Alexandria (94 percent), District of Columbia (85 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 2050, 63 percent of the household growth is projected to occur in Regional Activity Centers. In 2050, jurisdictions having the highest share of households located in Regional Activity Centers will be in the Central Jurisdictions: City of Alexandria (72 percent), District of Columbia (70 percent), and Arlington County (70 percent).
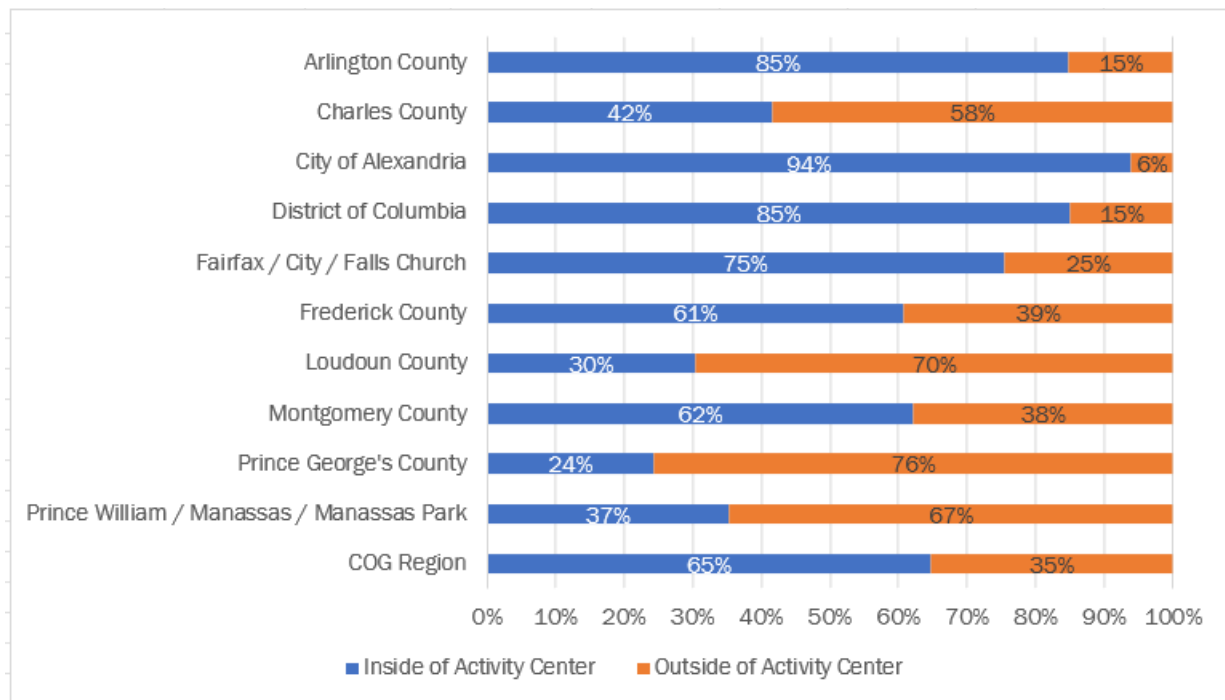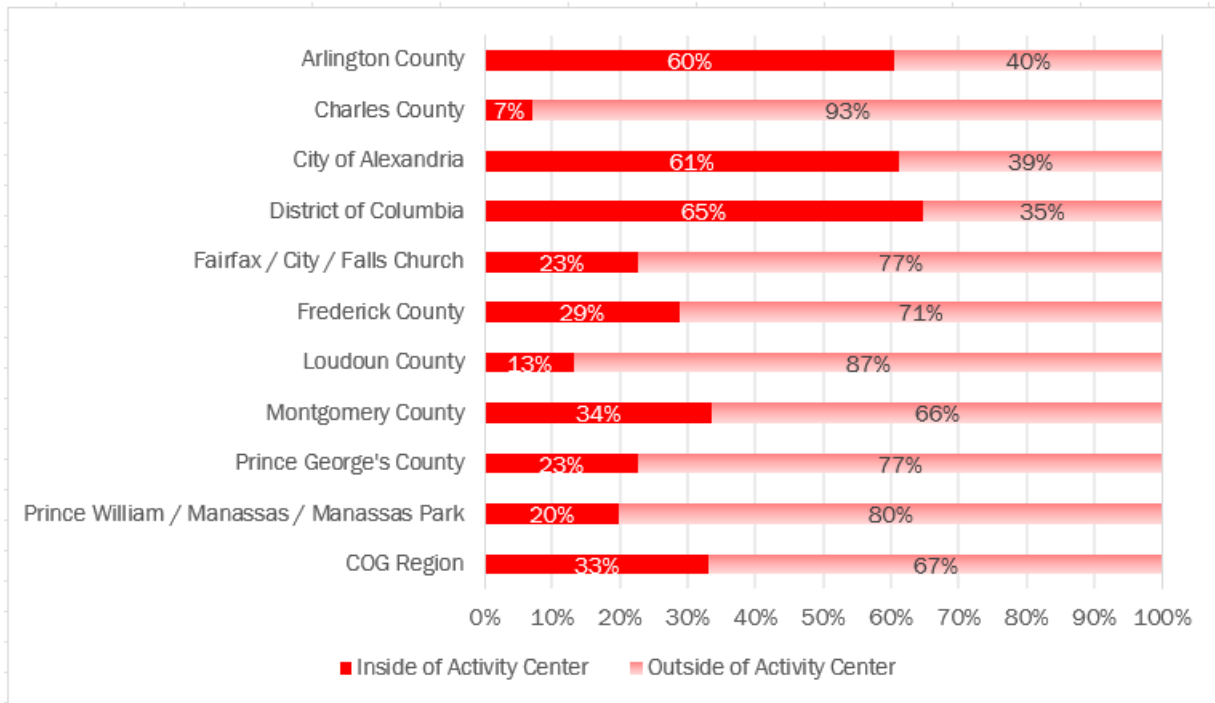
Map of Regional Activity Centers

Dot indicates the location of each Activity Center

Figure 19: Round 10.0 Share of Employment in Activity Centers by Jurisdiction in 2020

	Inside of Activity Center	Outside of Activity Center
Arlington County	82%	18%
Charles County	44%	56%
City of Alexandria	90%	10%
District of Columbia	84%	16%
Fairfax / City / Falls Church	72%	28%
Frederick County	60%	40%
Loudoun County	17%	83%
Montgomery County	58%	42%
Prince George's County	23%	77%
Prince William / Manassas / Manassas Park	34%	66%
COG Region	62%	38%

Figure 20: Round 10.0 Share of Employment in Activity Centers by Jurisdiction in 2050

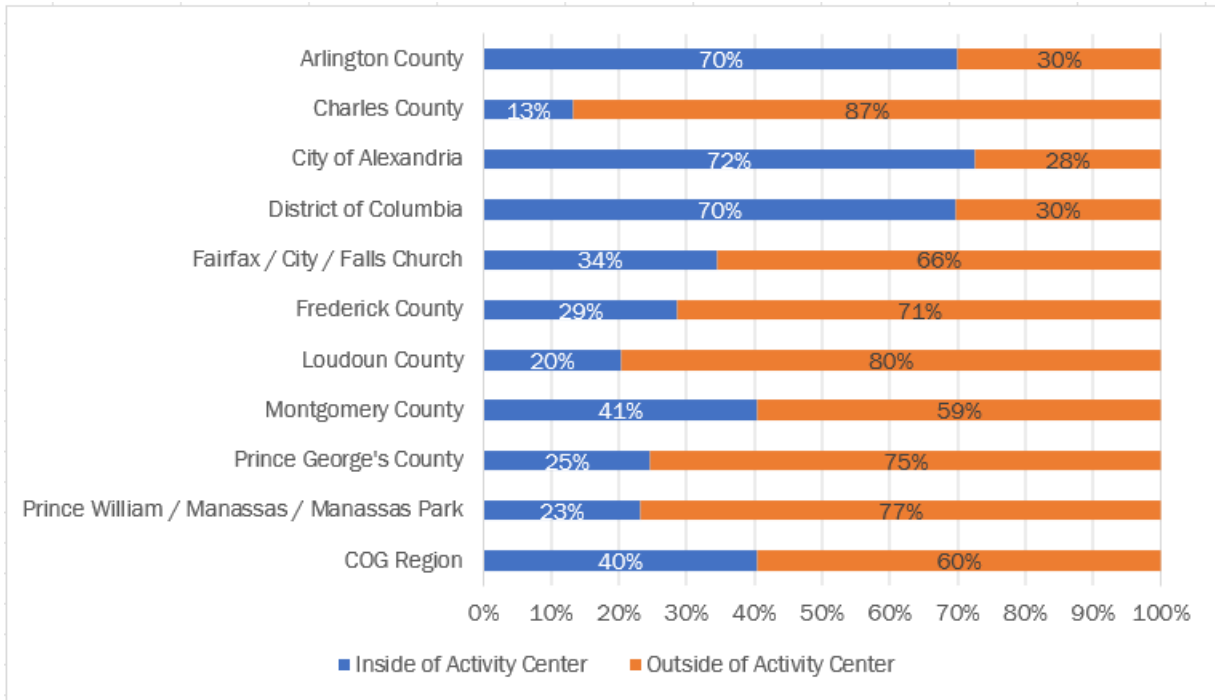|	Inside of Activity Center	Outside of Activity Center
Arlington County	85%	15%
Charles County	42%	58%
City of Alexandria	94%	6%
District of Columbia	85%	15%
Fairfax / City / Falls Church	75%	25%
Frederick County	61%	39%
Loudoun County	30%	70%
Montgomery County	62%	38%
Prince George's County	24%	76%
Prince William / Manassas / Manassas Park	37%	67%
COG Region	65%	35%

Figure 21: Round 10.0 Share of Households in Activity Centers by Jurisdiction in 2020

Figure 22: Round 10.0 Share of Households in Activity Centers by Jurisdiction in 2050