



District of Columbia

Bowie

College Park

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

Memorandum

Date: October 2, 2006

To: Members, COG Board of Directors

From: Paul DesJardin
Chief of Housing and Planning

Subject: Round 7.0a Cooperative Forecasts

Background

Since 1975, the COG Board of Directors has maintained the Cooperative Forecasting Program for preparing official forecasts of employment population, and household growth for the COG member jurisdictions. In May, the Metropolitan Development Policy Committee (MDPC) approved a request from the District of Columbia Office of Planning to modify the Round 7.0 Cooperative Forecasts to reflect land use changes associated with the recently-approved Washington Nationals stadium and related transportation improvements. Consistent with COG policy, the Board will be asked to approve the new Round 7.0a Cooperative Forecasts.

The Cooperative Forecasting Process

COG established the Cooperative Forecasting Program as a means to coordinate planning using common assumptions about future growth and development in the region. COG's Planning Directors Technical Advisory Committee (PDTAC) and its Cooperative Forecasting and Data Subcommittee oversee the technical aspects of the Program, while the Metropolitan Development Policy Committee and the COG Board of Directors approve the Forecasts and work to develop appropriate local and regional policy responses to the projections.

Development of the Forecasts and Forecast Updates

PDTAC members develop a major series or "Round" of Forecasts approximately every 4 years through a multi-stage, "top-down/bottom-up" process that employs a regional econometric model and local jurisdictional forecasts. The model projects employment, population, and households for the metropolitan Washington area based on national economic trends and local demographic factors. Concurrently, local jurisdictions develop independent projections of population, households, and employment based on their current residential or commercial development, market conditions, planned transportation improvements, and adopted land use plans and zoning. The two independent forecasts are reconciled into a consistent set of forecasts for nearly 2,000 regional traffic analysis zones (TAZs).

The Cooperative Forecasting Program provides the data necessary for regional planning activities including analyzing the effects of growth and developing policy responses to regional issues. The Forecasts are also used to determine the demand for public facilities including schools, parks, medical facilities, roads, stores, and services. As the official local government growth projections, the Cooperative Forecasts are also the inputs for the National Capital Region Transportation Planning Board (TPB) annual Air Quality Conformity Analysis of the Financially Constrained Long-Range Plan and Transportation Improvement Program. In 1991, the PDTAC and the COG Board adopted a policy which allows for – but does not require – annual updates to the forecasts due to a major local plan change. In 2003, the COG Board adopted resolution R03-7 which recommended that the Cooperative Forecasts be approved by the Board concurrent with the TPB's approval of the results of the annual Air Quality Conformity Analysis.

The Round 7.0a Cooperative Forecasts

Employment

In April, PDTAC members approved a request from the District of Columbia Office of Planning to update the Round 7.0 Cooperative Forecasts to reflect the construction of the new Washington Nationals stadium. The modifications to this TAZ also reflect several associated transportation improvements to better serve the neighborhoods immediately surrounding Stadium. The new Forecasts increase the District's population by approximately 1,300 additional households and nearly 2,000 people. The requested modifications – detailed in the accompanying letter – are the only modifications to COG member jurisdiction Forecasts from the Round 7.0 projections approved in November 2005.

The Round 7.0a Cooperative Forecasts show that employment in the region would total 4.2 million jobs in 2030, an increase of nearly 1.2 million jobs or nearly 39 percent. While strong increases are foreseen throughout the region, much of the anticipated employment growth is forecast in jurisdictions surrounding the Capital Beltway, with the fastest rates of job growth anticipated in more outlying jurisdictions.

The region's Central Jurisdictions – the District of Columbia, Arlington County, and the City of Alexandria – would collectively add nearly 267,400 new jobs during the forecast period, or an increase of nearly 23 percent. Employment growth in the region's Central Jurisdictions will account for one of every 5 new jobs.

More than half of the region's forecast job growth – 620,900 new jobs – is anticipated in the combined Inner Suburbs of Fairfax, Montgomery, and Prince George's counties and the cities of Fairfax and Falls Church.

The region's Outer Suburbs – including Loudoun, Prince William, and Frederick counties – would add more than 327,400 jobs during the period, or an increase of nearly 65 percent. Total employment in Loudoun County would increase by 121 percent – the fastest rate of job growth among all jurisdictions.

Among all jurisdictions in the region, Fairfax County would add the greatest number of new workers (244,100) followed by Prince George's County (185,900) and Montgomery County (170,000). Through 2030, the District of Columbia would continue to contain the greatest total

number of workers of any jurisdiction – 859,100 in 2030 – followed closely by Fairfax County (844,600).

Population and Households

Reflecting the steady growth of metropolitan Washington’s economy, the Round 7.0a Forecasts show that the region would add more than 1.6 million people and more than 661,000 households by 2030.

The Central Jurisdictions of the District of Columbia, Arlington County, and the City of Alexandria would collectively add more than 241,000 people and 114,500 households. The region’s Inner Suburbs would collectively add 273,000 households between 2005 and 2030, and more than 653,000 people. The Outer Suburbs would add 273,000 households as well and more than 738,000 people during the Forecast period.

Fairfax County anticipates the greatest increase in population and households of all COG member jurisdictions: between now and 2030, Fairfax County’s population would increase by 290,000 people, while the total number of households in the County would increase by nearly 105,000. Loudoun County would see the second largest increase in population, adding more than 233,000 people, and Montgomery County would add 213,800 people. Loudoun County would also experience the fastest rate of residential growth (94 percent) during the forecast period of all COG jurisdictions.

Finally, implicit in the forecasts are several continuing economic and demographic trends. Though not shown in the jurisdictional summary tables, more than two-thirds of all new jobs in the region between now and 2030 are anticipated to be “services” industries of business, engineering, medical, legal, and management consulting. This growth will continue to fuel the need for a well-educated, highly-skilled labor force. In addition, the population of the region will be increasingly more diverse, as international immigration will likely continue to account for a significant share of the region’s net population growth. The region will also be “graying” as one of the fastest growing age groups locally and nationally will be persons aged 65 or more years. The beginning of this change is imminent in that the first of the “baby boomer” population will reach age 65 in the year 2010.