

POPULATION AND EMPLOYMENT FORECASTS

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COG Community Planning and Services

Planning Directors Technical Advisory Committee
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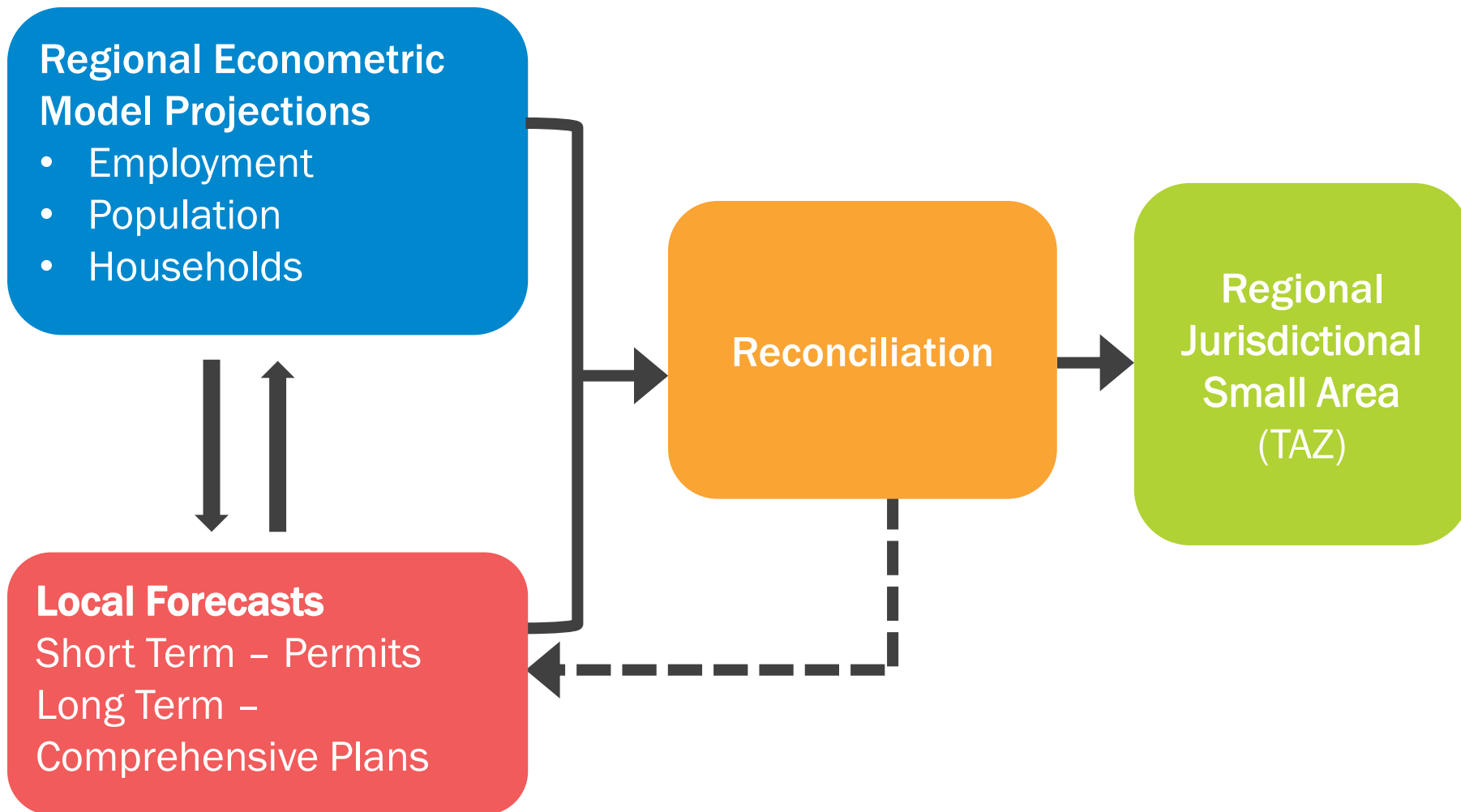
Overview of Forecasts (Round 9.1)

- First update to Forecasts that were approved in 2016 (Round 9.0)
- Many COG/TPB jurisdictions updated their Forecasts but cumulative regional change is negligible
- Updated Forecasts also obtained for:
 - Baltimore region (BMC Round 8B)
 - Fredericksburg MPO (GWRC/FAMPO 2045)
 - Calvert and St. Mary's (C-SMMPO)
 - Clarke and Fauquier

Transportation Land Use Coordination

Regionally Significant Transportation Project	Cooperative Forecast	Year	Land Use Changes
New York Avenue Metrorail Station	6.2	2000	D.C. - population and employment
Inter-County Connector (ICC)	6.4a	2004	D.C., Montgomery and Prince George's counties, Rockville - population and employment
Purple Line	7.2a	2009	Montgomery and Prince George's counties - population and employment
Silver Line Metrorail	8.2	2010	Fairfax county – population and employment
U.S. 1 Bus Rapid Transit / Embark Richmond Highway	9.1	2018	Fairfax County - population and employment

MWCOG Cooperative Forecasting Process



Summary of Current Forecasts (Round 9.1)

COG / TPB Planning Area (Thousands)

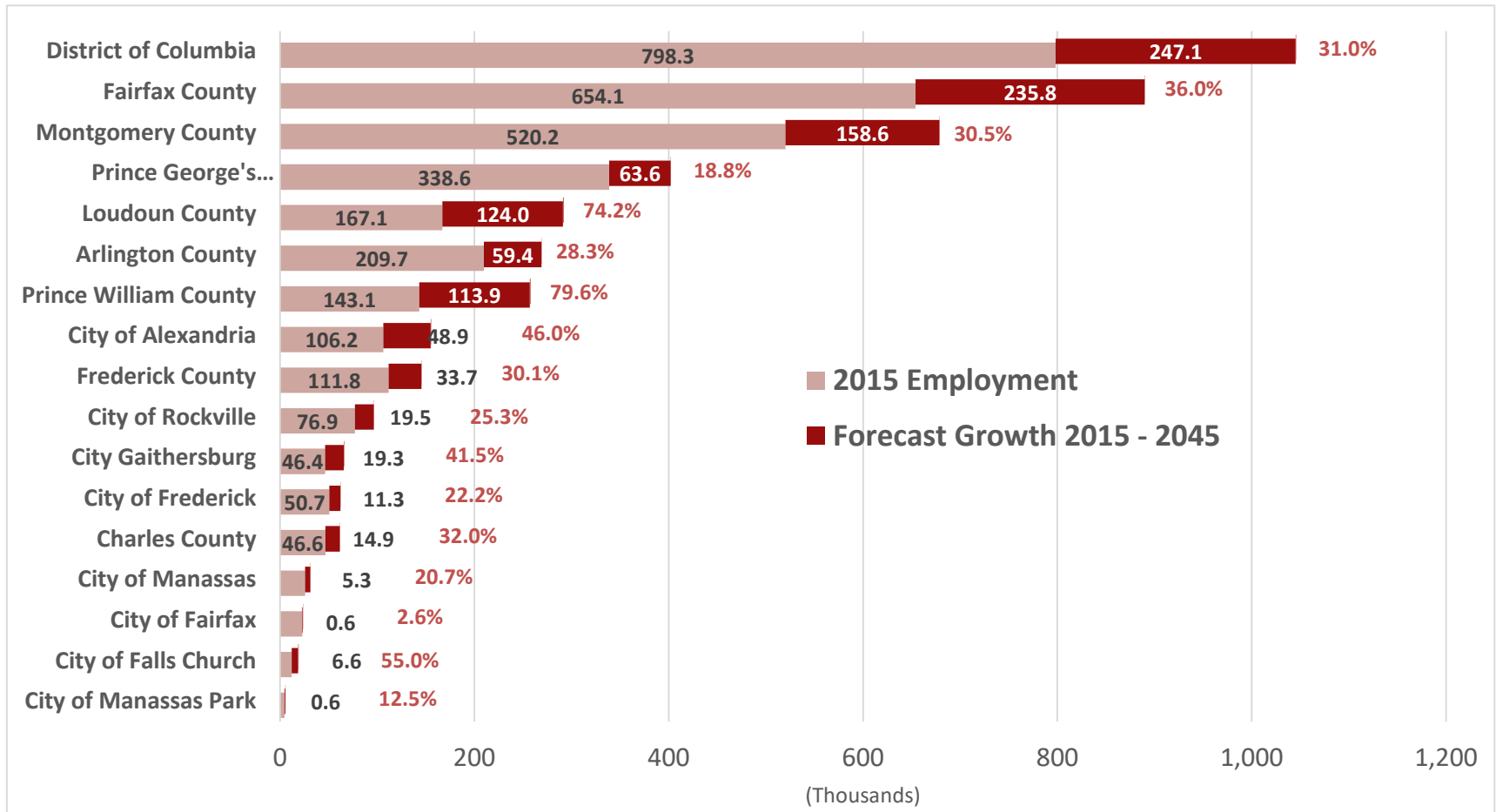
	2015 to 2045			
	2015	2045	Number	Percent
Employment	3,160.8	4,273.8	1,113.0	35%
Population	5,390.6	6,925.7	1,535.1	28%
Households	2,011.7	2,659.9	648.2	32%

Change in 2045 Forecast from Prior Round

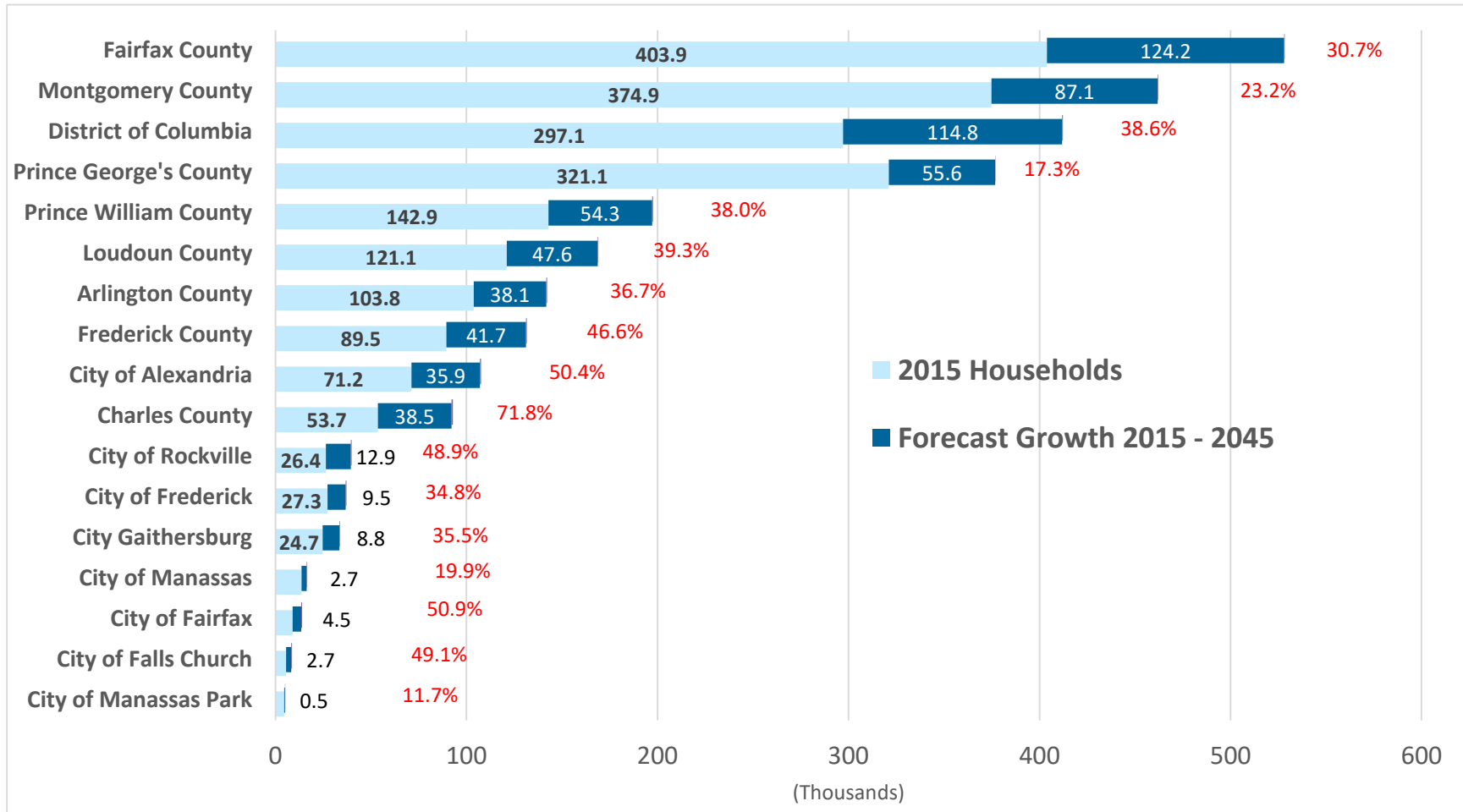
COG / TPB Planning Area (Thousands)

	Round 9.0	Round 9.1	Number	Percent
Employment	4,291.2	4,273.8	-17.4	-0.4%
Population	6,876.0	6,925.7	49.7	0.7%
Households	2,651.3	2,659.9	8.6	0.3%

Forecast Employment Growth (Thousands; 2015-2045)



Forecast Household Growth (Thousands; 2015-2045)

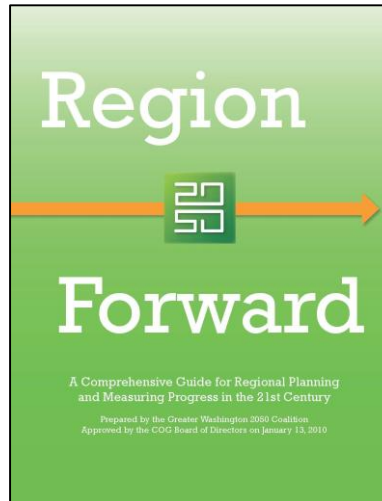


Regional Goals, Targets, and Initiatives



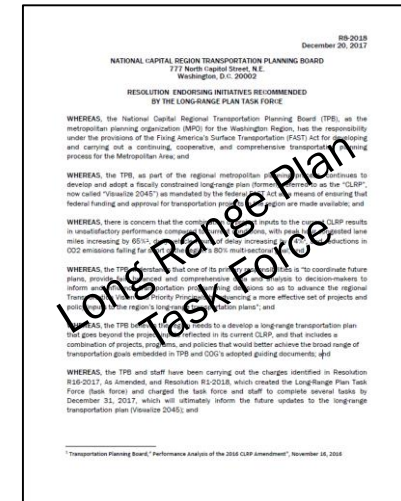
1998 TPB Policy Goal

Develop, implement, and maintain an interconnected transportation system that enhances quality of life and promotes a strong and growing economy throughout the entire region, including a healthy regional core and dynamic **Regional Activity Centers** with a mix of jobs, housing and services in a walkable environment.



2010 COG Land Use Target

Capture **75% of future employment growth and 50% of future household growth in Regional Activity Centers.**

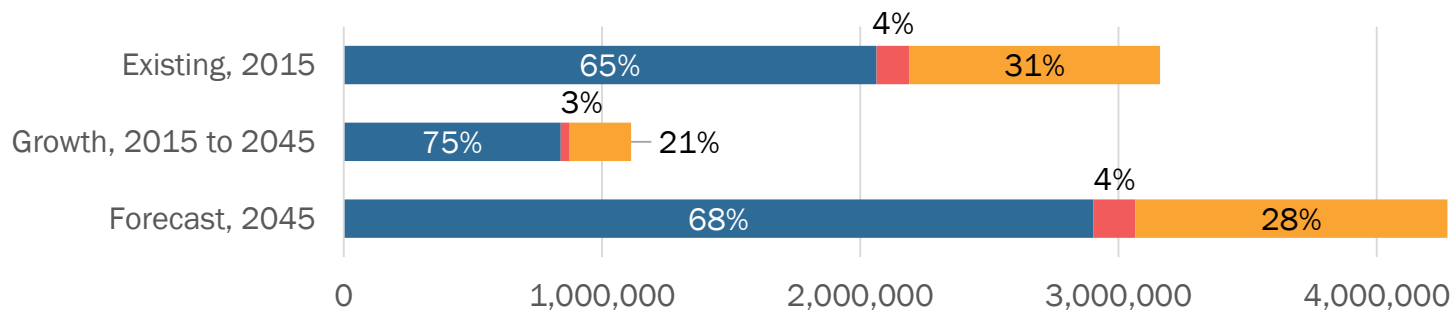


2017 TPB Endorsement

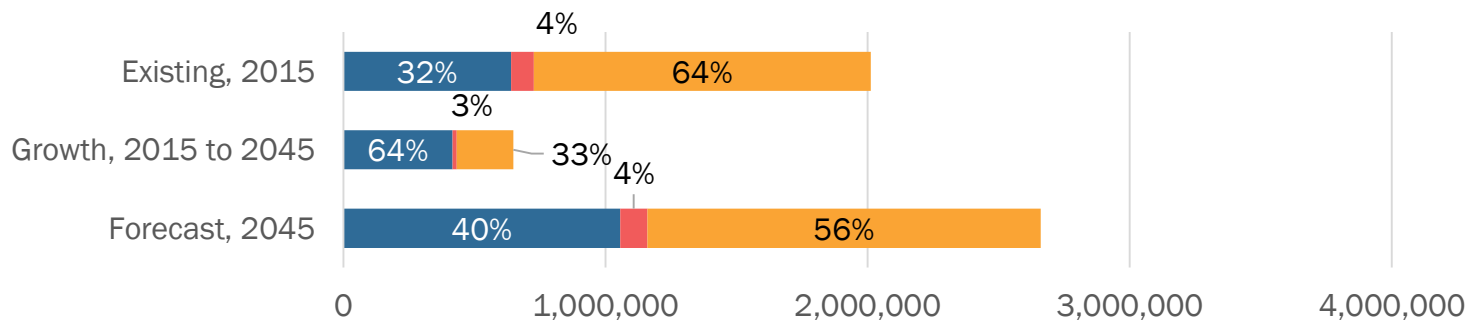
Optimize Regional Land-Use Balance - Increase jobs and housing around *underused rail stations* and *Activity Centers* with high-capacity transit. Encourage building *additional housing in the region* to match employment projections.

Jobs and Housing at Activity Centers and Premium Transit

Employment



Households

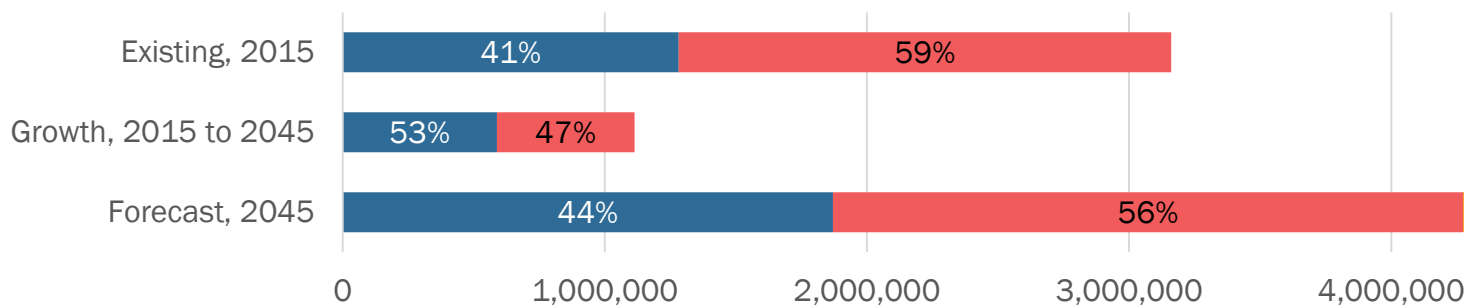


- Within Activity Centers
- Outside of Activity Centers but Near Premium Transit
- Outside Activity Center and Outside Premium Transit

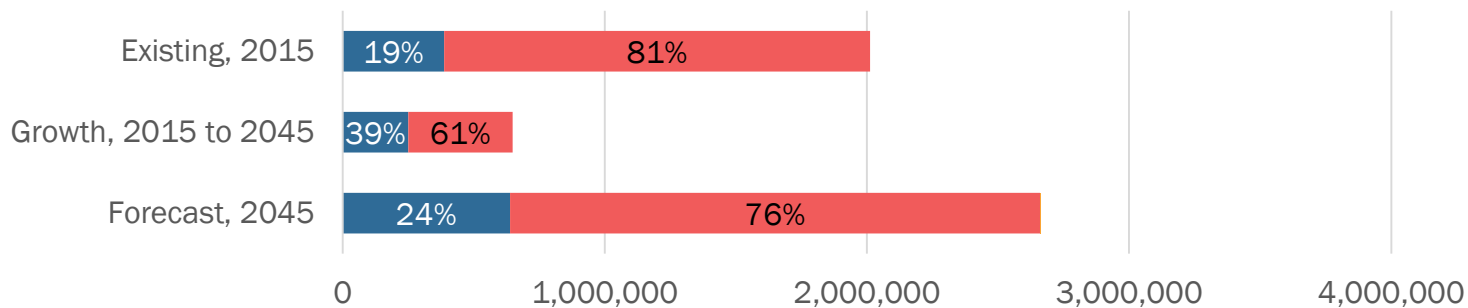


Jobs and Housing at Premium Transit

Employment



Households

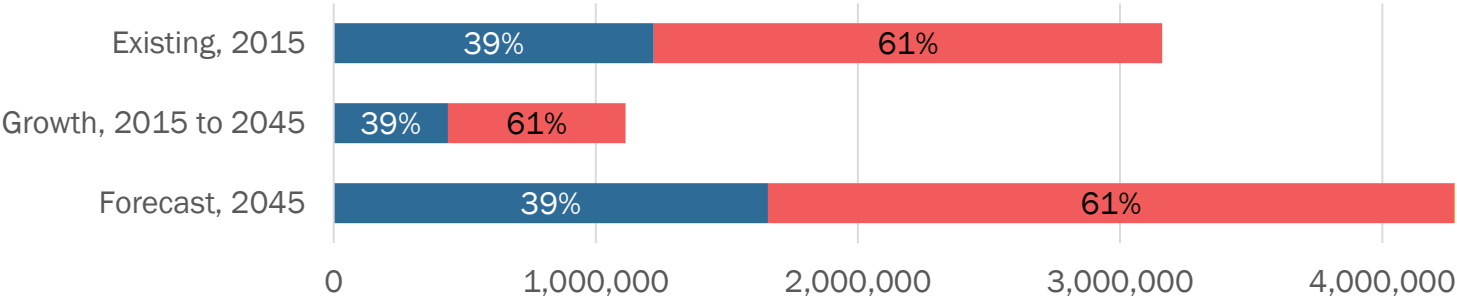


■ Premium Transit ■ Outside of Premium Transit

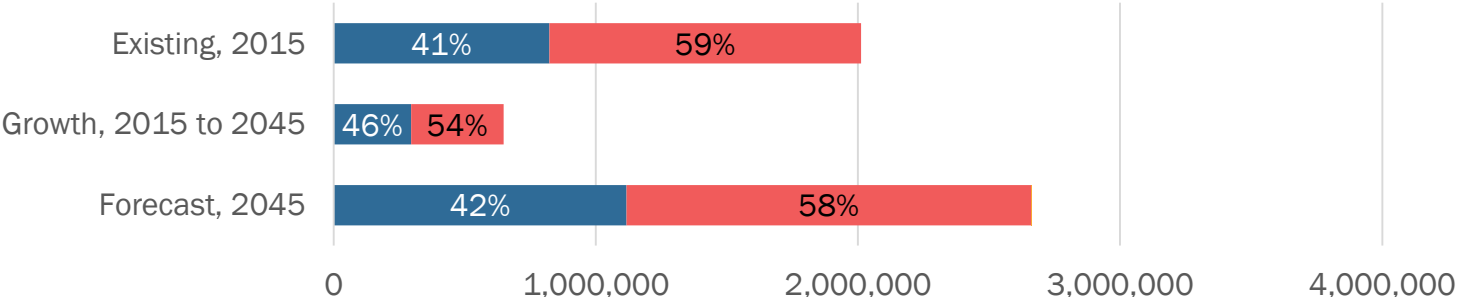


Jobs and Housing and the East West Divide

Employment



Households



■ East ■ West

Change in 2040 Forecast from Round 8.0

2040 Forecast Comparison COG / TPB Planning Area (Thousands)

	Round 8.0 (2010)	Round 9.1	Number	Percent
Employment	4,358.2	4,116.0	-242.2	-6%
Population	6,386.2	6,712.8	326.6	5%
Households	2,502.1	2,565.4	63.3	3%

TPB Endorsed Initiative – Optimize Regional Land Use Balance

- Through this initiative the TPB aspires to improve the performance of the region’s transportation system.
- Three primary components of this aspirational initiative:
 1. *More households are needed to provide regional workers to meet demand from future job growth.*
 2. *Location of future growth in households and jobs within a jurisdiction should be focused in Regional Activity Centers and/or in areas with high-capacity transit.*
 3. *Better balanced distribution of future growth in jobs and housing between the eastern and western portions of the region should be sought.*



Planning Directors Discussion Topics

- Take stock of the current forecast.
 - *Assess how Round 9.1 may address aspirations of the Optimized Regional Land Use Balance scenario*
- Highlight examples of efforts under way in respective jurisdictions that demonstrate movement toward these aspirations.
- Discuss how future updates to local plans, strategies, and corresponding forecast could advance the TPB endorsed aspirational initiative.
 - What enabling policy actions can assist Land Use planners.



Next steps

- Transmitted TAZ data files to TPB staff for AQ Conformity analysis
- Staff analysis of sub-regional growth (corridors, Activity Centers, Transit Station areas, etc.)
- Ongoing Planning Directors work program to support goals of the TPB and LRPTF
- Final approval in Fall concurrent with TPB approval of Conformity results
- Monitor planning and economic trends:
 - Federal presence and economy
 - Commercial space utilization and re-purposing
 - Demographic trends
 - Housing affordability

Questions?

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