Analysis of Draft Round 6.4 Cooperative Forecasts
Preliminary Findings

What are the trends? By region? By jurisdiction?

Employment

- Several jurisdictions have lowered their employment 2000 base year. At the regional level 87,900 jobs were reduced (compared to the Round 6.3 forecast 2000 base year).
- Round 6.4 Employment forecasts are tracking slightly below the "High" Round 6 Econometric Model projections.
- Approximately 1.3 million new jobs would be added by 2030 or an increase by 48 percent.
- Nearly 47 percent of the job growth would occur in the Inner Suburbs: 22 percent of the growth would occur in the Central Jurisdictions, and 31 percent of the job growth would occur in the Outer Jurisdictions.
- Among all jurisdictions, Fairfax County still anticipates the greatest absolute increase (226,100 jobs) in new jobs between 2000 and 2030, followed by Prince George's County (222,500) and Montgomery County (175,200).
- Loudoun County would continue to see the greatest percentage increase (198 percent) in new jobs between 2000 and 2030, followed by Stafford County (136 percent).

Population

- The region's population would increase by 1.6 million people or 36 percent between 2000 and 2030.
- More than 49 percent of the growth would be seen in the Outer Suburbs, the Inner Suburbs would account for 38 percent of the growth, and the Central Jurisdictions would contribute 13 percent of the total.
- Round 6.4 Population and Household Forecasts are slightly below the "High" Econometric Model Scenario in the early years and continue to stay below in the outer years.
- Among all jurisdictions, Loudoun County anticipates the greatest absolute increase (292,500) in population, followed by Fairfax County (227,600) and Montgomery County (226,700).
- Loudoun County would experience the greatest percentage change (173 percent) in population between 2000 and 2030, followed by Stafford County (95 percent).

Households

- More than 668,400 households would be added to the regional total by 2030 or an increase of more than 39 percent.
- More than 45 percent of the growth is foreseen in the Outer Suburbs; the Inner Suburbs would contribute about 40 percent; and the Central Jurisdictions would account for approximately 15 percent of the region's household growth.
- Among all jurisdictions, Loudoun County would experience the greatest absolute change (104,000) in households, followed by Montgomery County (95,400) and Fairfax County (87,700).
- The fastest rate of household growth is anticipated in Loudoun County (174 percent) followed by Stafford County (107 percent) and Charles County (83 percent).

COG Membership only:

- **District of Columbia**

The District of Columbia made no changes to the population and household components to the Round 6.4 Cooperative Forecast. The employment totals did not change for the base year and forecast years (2000-2030).The District did make changes to the employment data at the TAZ level (re-distribution).

- **Montgomery County**

Montgomery County's biggest change for Round 6.4 is the year 2000 employment base year adjustment. In the past, the employment forecasts were based on the Census Bureau's County Business Patterns, now the forecasts are based on the Bureau of Labor Statistic's ES-202 data. As a result, the Round 6.4 employment 2000 base year is 65,200 jobs less than the Round 6.3 employment 2000 base year. The employment forecast for 2030 is 50,000 fewer jobs than Round 6.3.

- **Arlington County**

Compared to Round 6.3, Arlington County made larger growth assumptions in population and households, and a smaller increase in employment. Like other jurisdictions in the COG region, Arlington County lowered employment growth due to a lower based employment figure for the 2000 base year.

- **Loudoun County**

For Round 6.4, Loudoun County made changes to the three components (Employment, Population, and Households) based on stronger than anticipated residential development in Loudoun County. The population forecast for 2030 is 20,200 more people for 2030 compared to Round 6.3. The employment forecast for 2030 is only 4,500 more jobs than Round 6.3.

- **Prince William County**

Revisions were made to the Prince William County household forecasts based upon a surge in housing permits issued during the 2000-2003 time period. Employment adjustments were made based on new Comprehensive Plan revisions – higher density mixed-use development near VRE stations. Adjustments were also made to incorporate – mixed-use designations of the Potomac Communities (areas adjacent to Route 1) in later forecasting years.

- **City of Alexandria**

The only change for the Round 6.4 Cooperative Forecast is the city's employment forecast. A new 2000 base year using the new Dun & Bradstreet figures resulted in a lower 2000 base year and subsequent forecast years. The Patent and Trademark Office became a major new employer in Alexandria and necessitated changing the employment forecast at the TAZ level.

DRAFT Round 6.4 - Regional Activity Clusters by Employment

Jurisdiction	Employment 2030				Employment 2000 - 2030			
	Inside Clusters		Outside Clusters		Inside Clusters		Outside Clusters	
City of Alexandria	131,653	93%	9,351	7%	49,606	100%	121	0%
Arlington County	234,304	85%	41,494	15%	73,652	84%	13,770	16%
Charles County	33,939	49%	35,161	51%	9,506	50%	9,493	50%
District of Columbia	759,259	91%	71,937	9%	150,541	98%	2,638	2%
Fairfax County / Cities	583,907	73%	217,168	27%	187,940	82%	40,108	18%
Frederick County	108,380	61%	69,457	39%	52,777	68%	25,361	32%
Loudoun County	156,589	61%	101,524	39%	100,672	59%	70,395	41%
Montgomery County	510,413	78%	142,261	22%	154,022	88%	21,051	12%
Prince George's County	213,210	39%	339,105	61%	101,605	46%	120,984	54%
Prince William County / Cities	109,784	52%	99,593	48%	51,207	54%	43,880	46%
COG Region	**2,841,438**	**72%**	**1,127,051**	**28%**	**931,528**	**73%**	**347,801**	**27%**

DRAFT Round 6.4 - Regional Activity Clusters by Households

Jurisdiction	Households 2030				Households 2000 - 2030			
	Inside Clusters		Outside Clusters		Inside Clusters		Outside Clusters	
City of Alexandria	63,925	85%	11,413	15%	13,220	98%	229	2%
Arlington County	80,134	69%	36,521	31%	24,900	84%	4,854	16%
Charles County	28,403	37%	47,692	63%	11,849	34%	22,578	66%
District of Columbia	203,131	67%	101,310	33%	37,654	67%	18,449	33%
Fairfax County / Cities	158,622	35%	294,478	65%	35,520	40%	54,380	60%
Frederick County	32,749	27%	87,406	73%	12,190	24%	37,905	76%
Loudoun County	37,828	23%	126,043	77%	20,782	20%	83,189	80%
Montgomery County	175,382	42%	243,402	58%	65,862	69%	29,556	31%
Prince George's County	74,550	20%	296,457	80%	15,973	20%	65,273	80%
Prince William County / Cities	55,653	31%	126,698	69%	20,145	28%	52,625	72%
COG Region	**910,377**	**40%**	**1,371,420**	**60%**	**258,095**	**41%**	**369,038**	**59%**

- By the end of the forecast horizon year, 2030, 72 percent of employment in the region will be located in regional activity clusters. The percentage employment in activity clusters remained the same from Round 6.3 to Round 6.4. By 2030, 40 percent of households in the region are projected to be in Regional Activity Clusters. This represents a slight increase (1 percent) from the Round 6.3 forecast.

- Between 2000 and 2030, 73 percent of the increment of employment growth will occur in Regional Activity Clusters. Compared to Round 6.3, this is a slight decline (1 percent) in job located in activity clusters. Forty-one percent of the increment household growth from 2000 to 2030 will occur in activity clusters. This represents a two percent increase from the Round 6.3 forecast.