



Montgomery Planning Research & Strategic Projects Division

05/11/2023

Briefing on Round 10 MWCOG Cooperative Forecast: 2020-2050

Briefing Agenda

- Cooperative Forecast Overview
- Montgomery County Forecast Overview
- Employment Forecast
- Population and Households Forecast
- Summary
- Q&A

Cooperative Forecast Overview

What Is the Cooperative Forecast?

- Established by Metropolitan Washington Council of Governments (MWCOCG) in 1975
- Official local and regional projections for employment, households, and population
- Inputs for transportation, water and air quality modeling by Montgomery County, MWCOCG and National Capital Region Transportation Planning Board, and private sector market analysis
- Major series or “Round” approximately every 5 years

Cooperative Forecast Participation

- Round 1 – 1976
- Round 2 – 1979
- Round 3 – 1983
- Round 3.5 – 1985
- Round 4 – 1987
- Round 4.1 – 1991
- Round 5 – January 1994
- Round 5.1 – May 1994
- Round 5.2 – 1995
- Round 5.3 – 1996
- Round 5.4 – 1997
- Round 6a – 1998
- Round 6.1 – 1999
- Round 6.2 – 2000
- Round 6.3 – 2003
- Round 6.4A – 2004
- Round 7.0 – 2005
- Round 7.0a – 2006
- Round 7.1 – 2008
- Round 7.2 – July 2009
- Round 7.2A – October 2009
- Round 8.0 – 2010
- Round 8.0a – 2011
- Round 8.1 – 2012
- Round 8.2 – 2013
- Round 8.3 – 2014
- Round 8.4 – 2015
- Round 9.0 – 2016
- Round 9.1 – 2018
- Round 9.2 – 2021
- **Round 10.0 – 2023**

Cooperative Forecast Participation

- Maryland:

- Montgomery County
 - City of Gaithersburg
 - City of Rockville
- Charles County
- Frederick County
 - City of Frederick
- Prince George's County

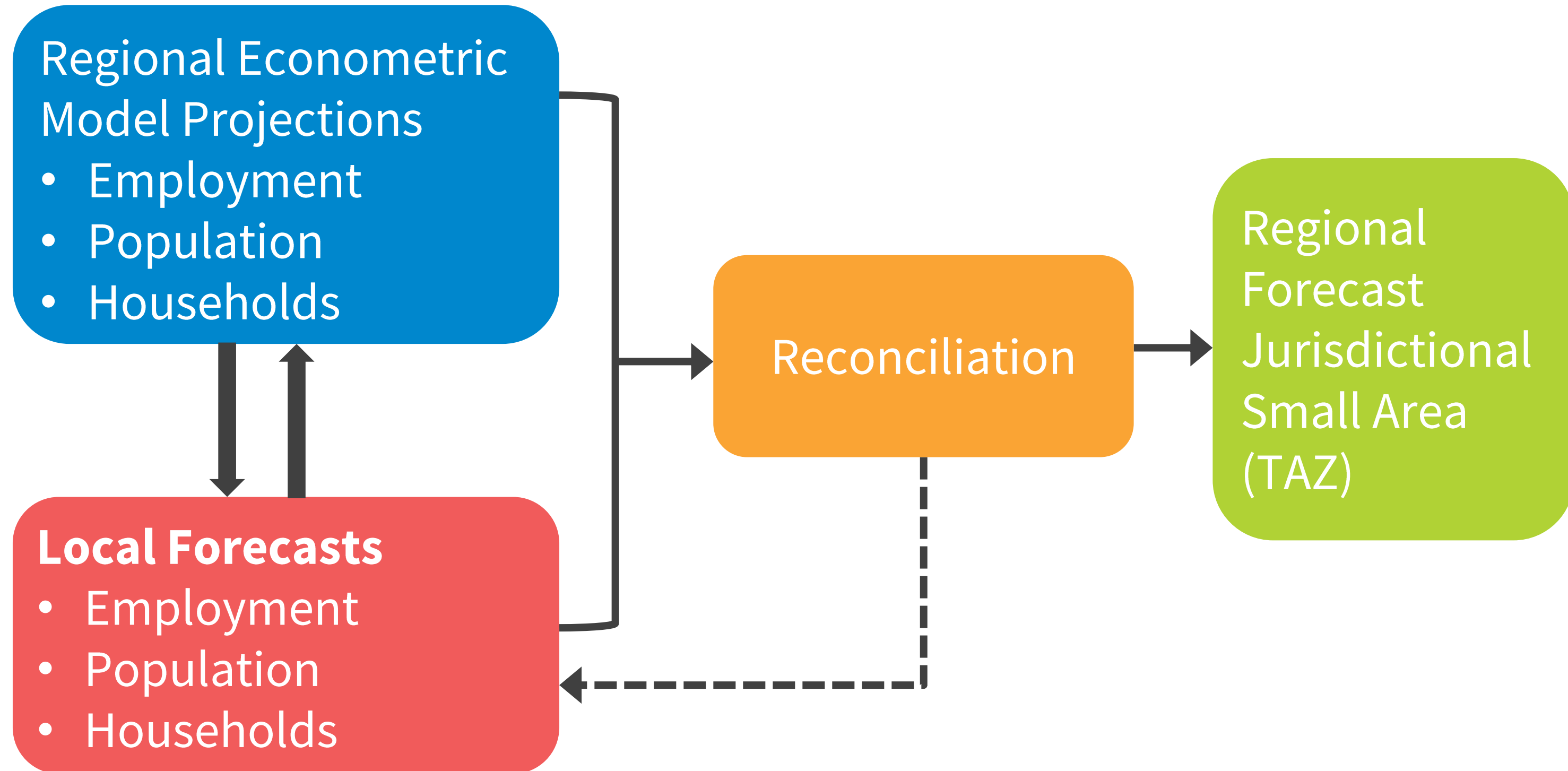
- District of Columbia

- Virginia:

- Arlington County
- Fairfax County
- Loudoun County
- Prince William County
- City of Alexandria
- City of Fairfax
- City of Falls Church
- City of Manassas
- City of Manassas Park



Cooperative Forecasting Process



Source: MWCOCG, "ROUND 9.0 COOPERATIVE FORECASTS OF FUTURE GROWTH", March 9, 2016.

Round 10 Regional Projections

COG Region (Millions)

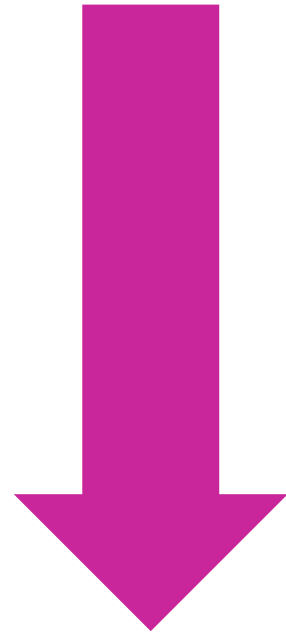
	2020	2025	2030	2035	2040	2045	2050	2020 to 2050	
								Number	%
Employment	3.2	3.4	3.6	3.7	3.9	4.0	4.1	1.0	31%
Population	5.7	6.0	6.2	6.5	6.8	7.0	7.2	1.5	26%
Households	2.1	2.3	2.4	2.5	2.6	2.7	2.8	0.7	32%

(DRAFT)

Source: MWCOC, "COG JURISDICTIONAL ROUND 10.0 COOPERATIVE FORECASTS OF EMPLOYMENT, POPULATION, AND HOUSEHOLDS", presented at the May 10, 2023 MWCOC Board of Directors meeting.

Montgomery County Forecast Overview

Montgomery County Forecasting Approach



Top-Down:

- Establish “control totals” for the total number of households, population, and employment the County is forecasted to have from 2020 to 2050

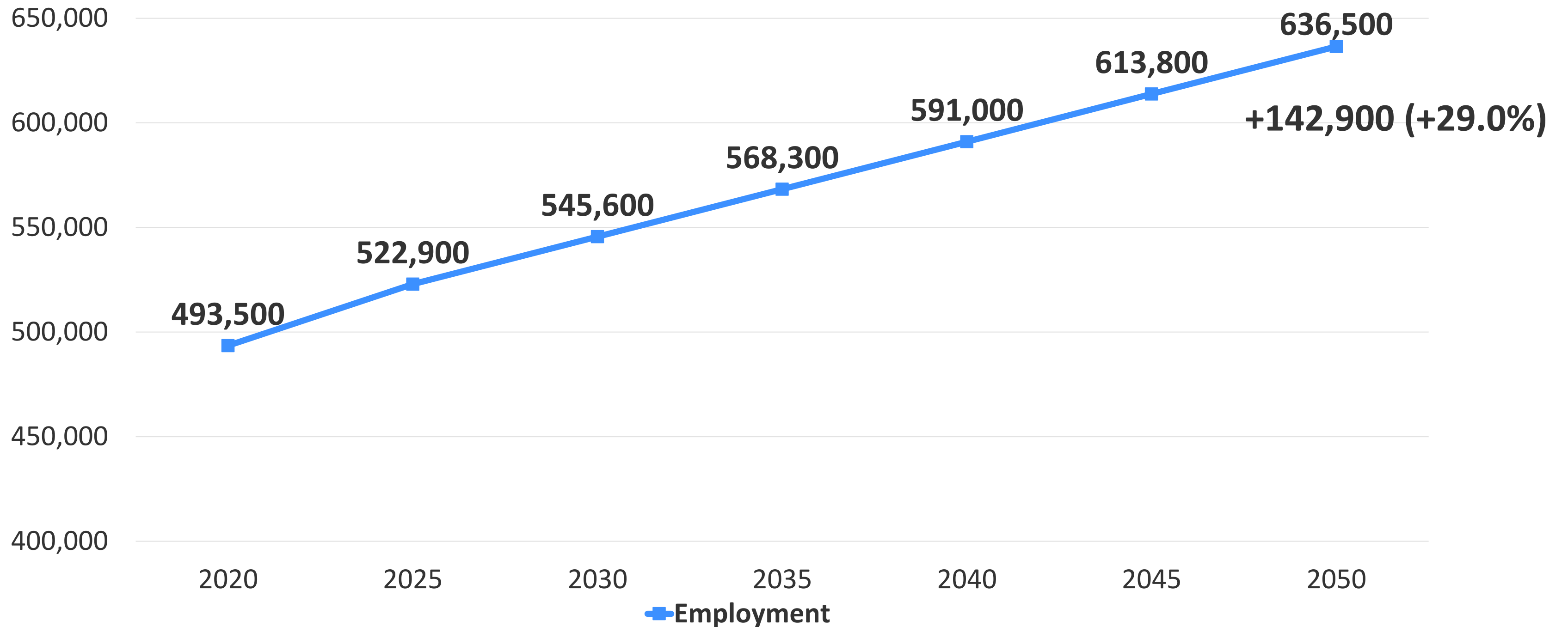


Bottom-Up:

- Forecast households, population, and employment by Transportation Analysis Zones (TAZ)
- Sum of all small area (TAZ) forecasts cannot exceed the “control totals”
- Allocations based on review of development pipeline, master plans, discussions with Planning staff

Employment Forecast

Employment Forecast: Round 10 Totals

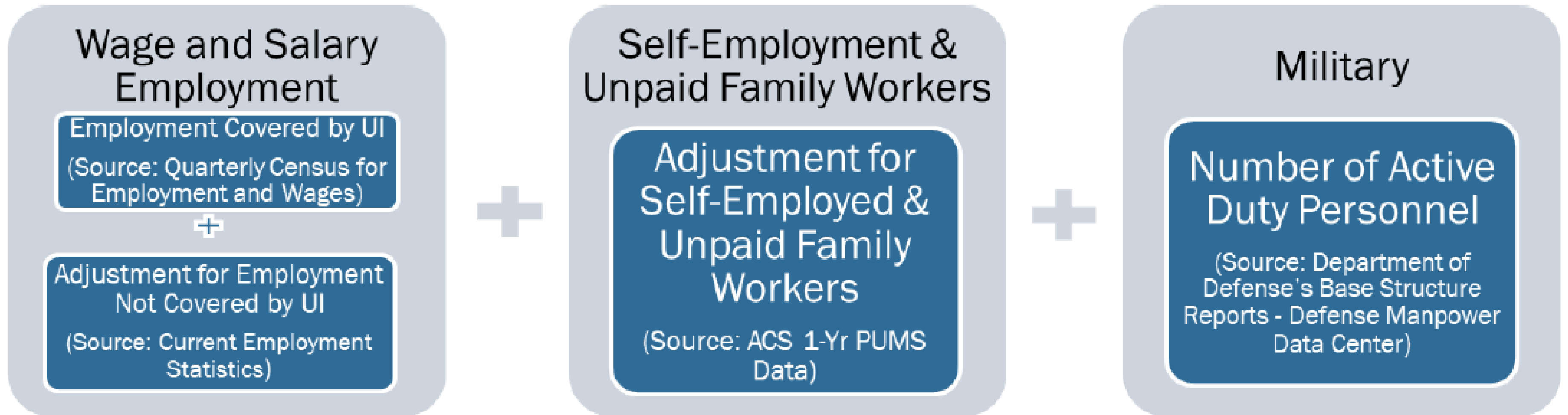


Note: Numbers for employment and absolute change rounded to the nearest hundred. Numbers for absolute change and percent change calculated from unrounded numbers.

Source: MNCPPC, Montgomery Planning, Research and Strategic Projects.

Employment Forecast Methodology

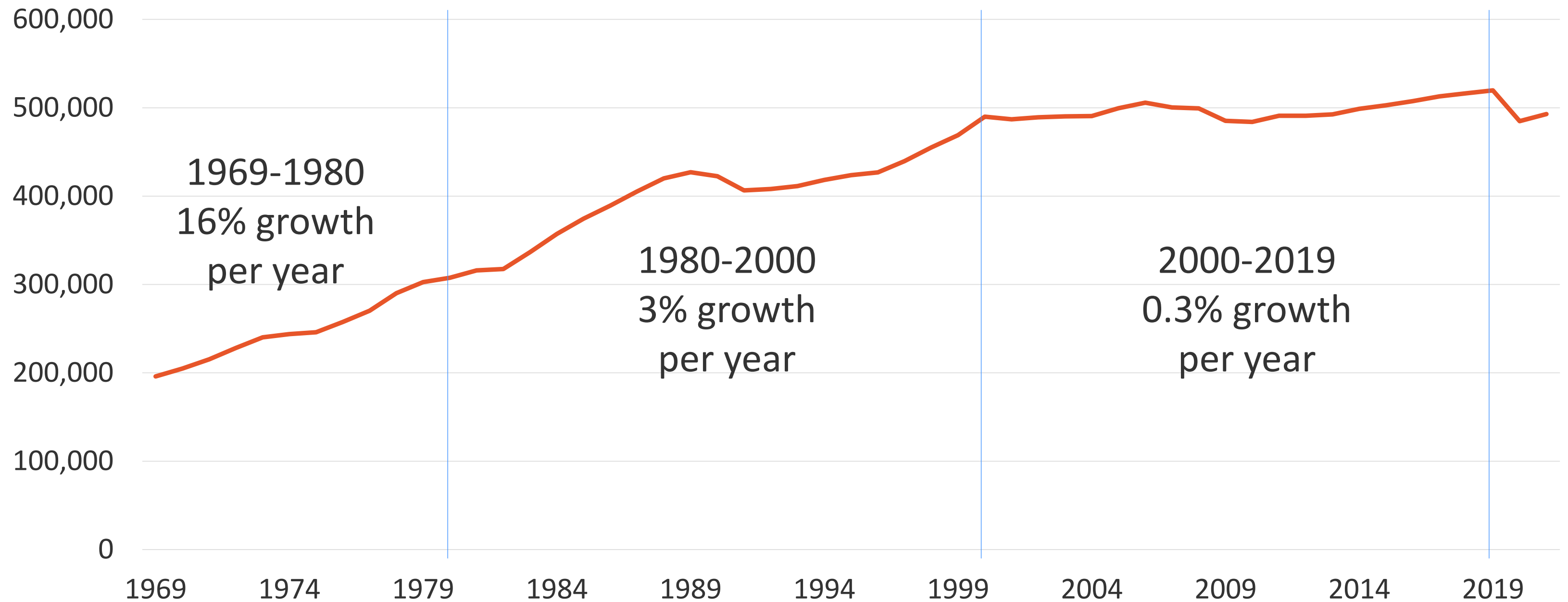
Estimating total employment in 2020 base year:



Source: MWCOCG, "Update to Suggested Baseline Employment Estimates", March 18, 2022.

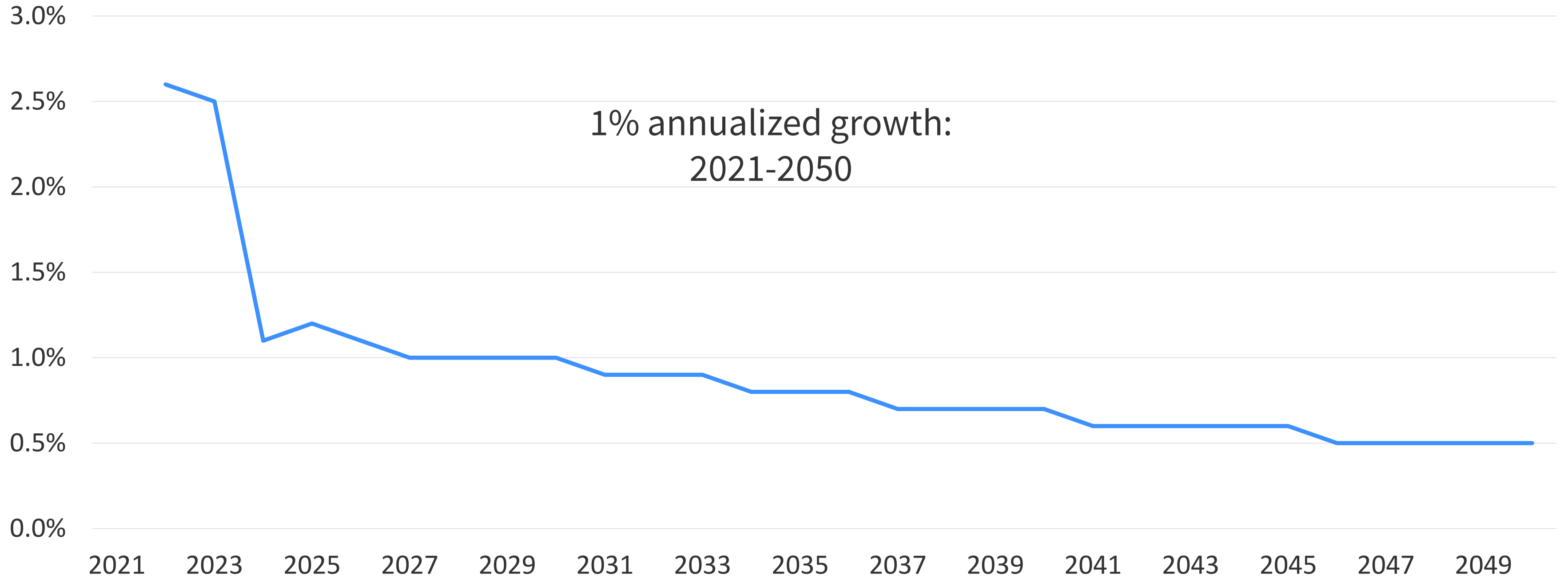
Historic Employment Growth

**BEA Wage and Salary Employment:
Number of Jobs and Annualized Growth Rates by Period for Montgomery County**



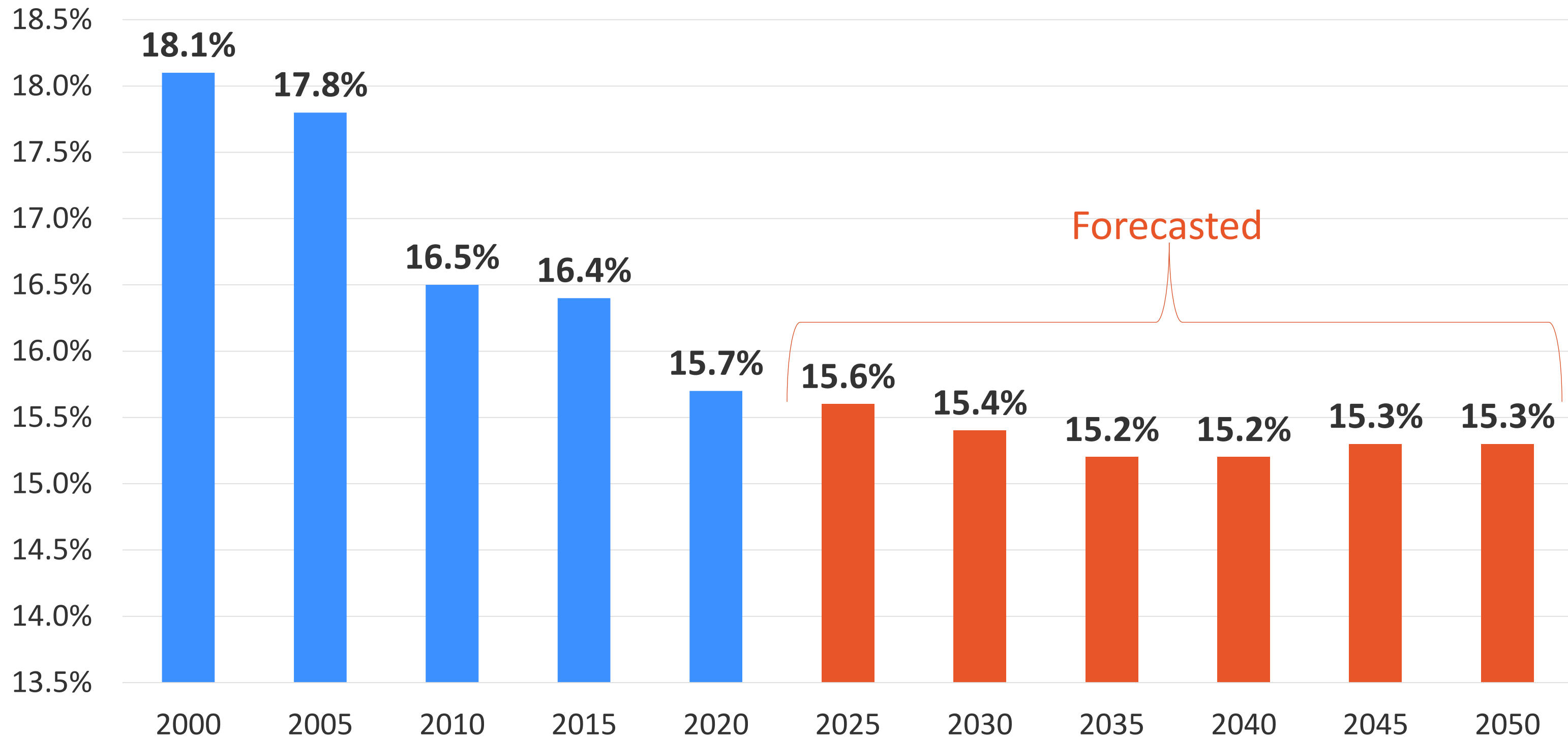
Source: U.S. Bureau of Economic Analysis.

Woods & Poole Employment Forecast



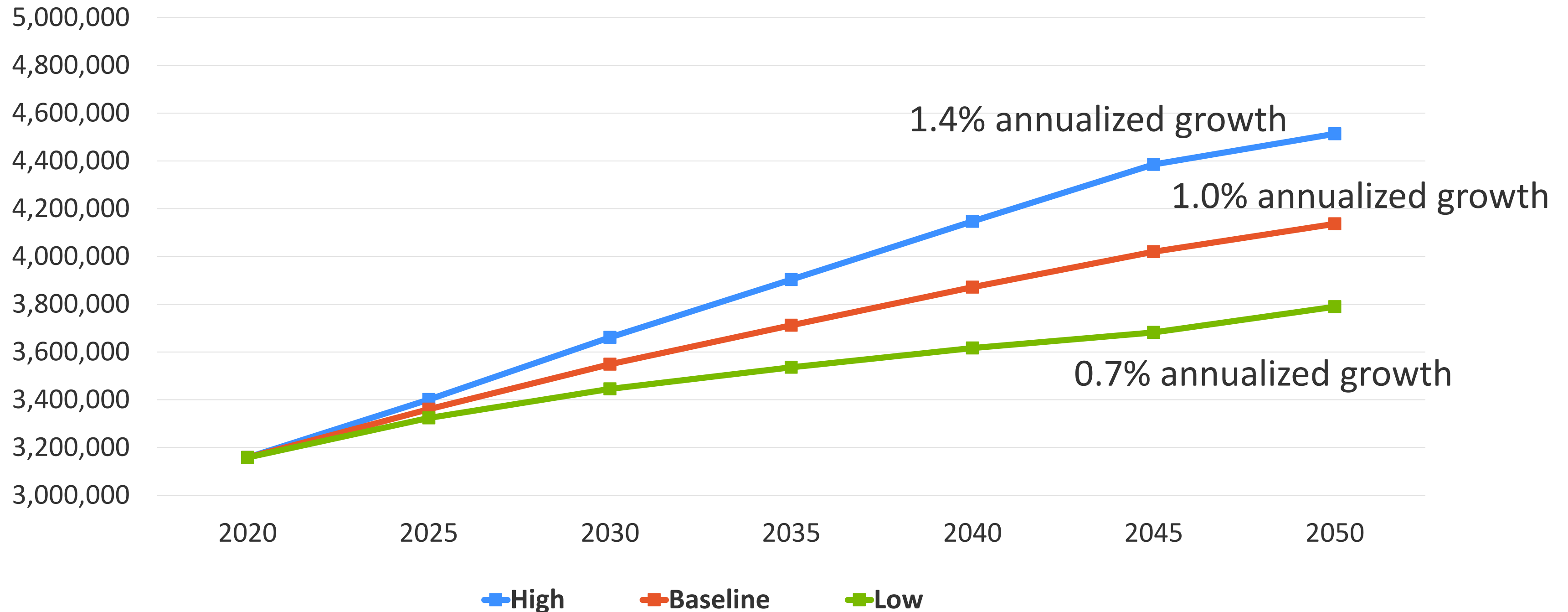
Source: Woods & Poole Economics, Inc., 2022 Regional Projections and Database.

Montgomery County's Share of Regional Employment



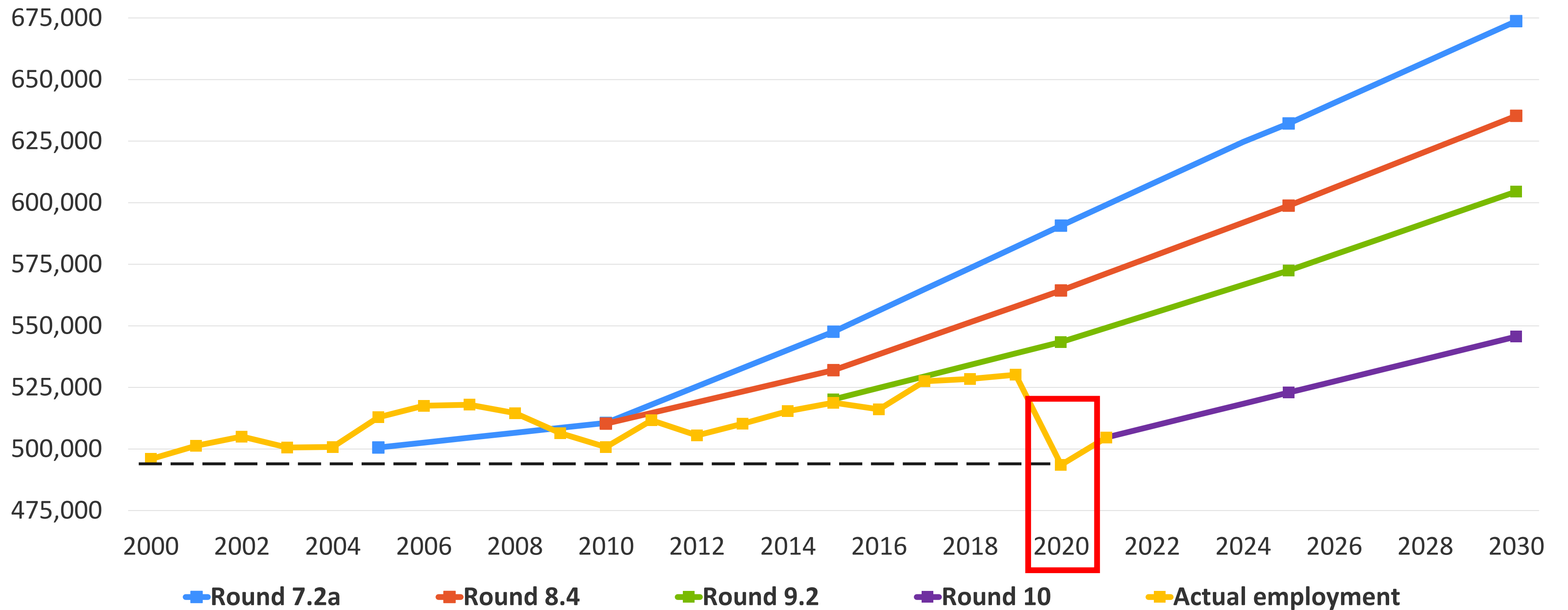
Source: MNCPPC, Montgomery Planning, Research and Strategic Projects; MWCOG.

ICF Regional Employment Projections



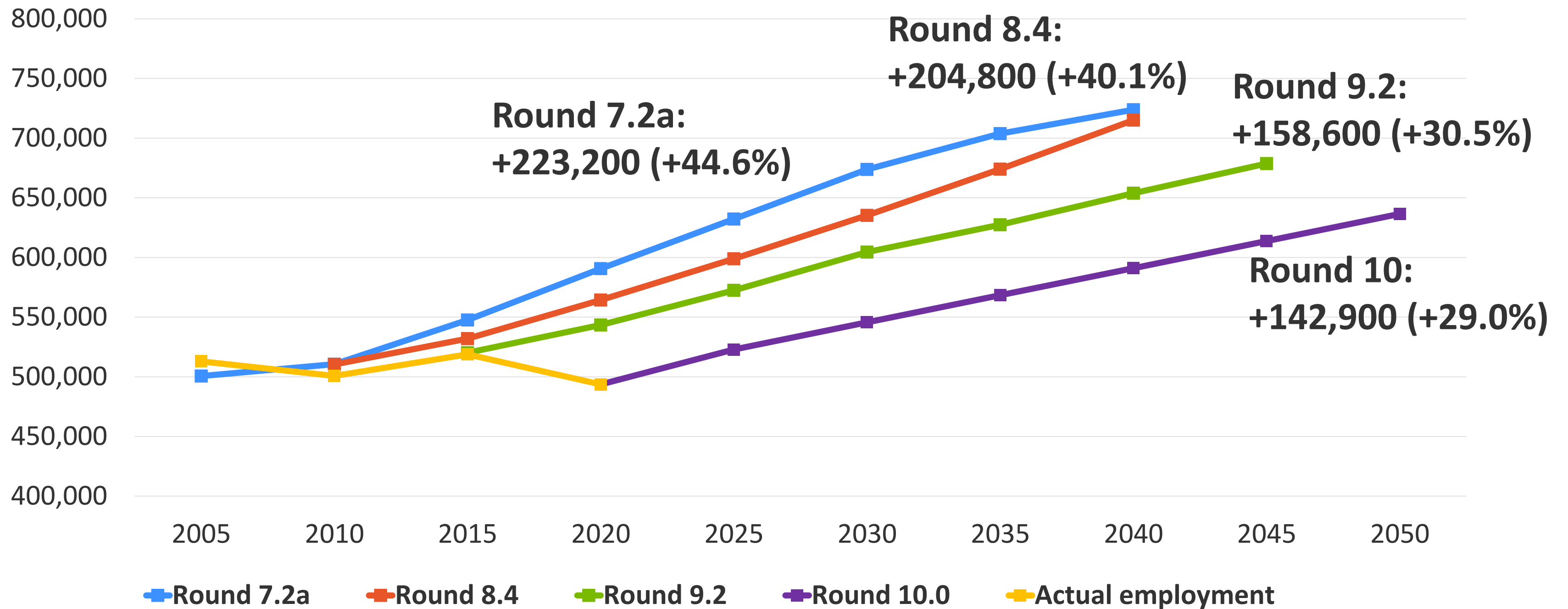
Source: ICF, "COG Round 10 Cooperative Forecast Technical Assistance: Technical Memo."

Recent Employment Trends: A Closer Look



Source: MNCPPC, Montgomery Planning, Research and Strategic Projects.

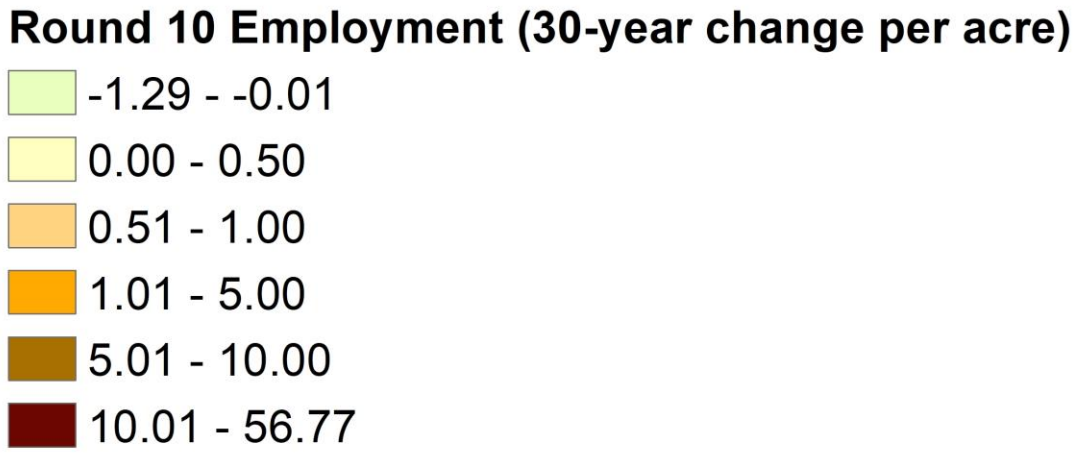
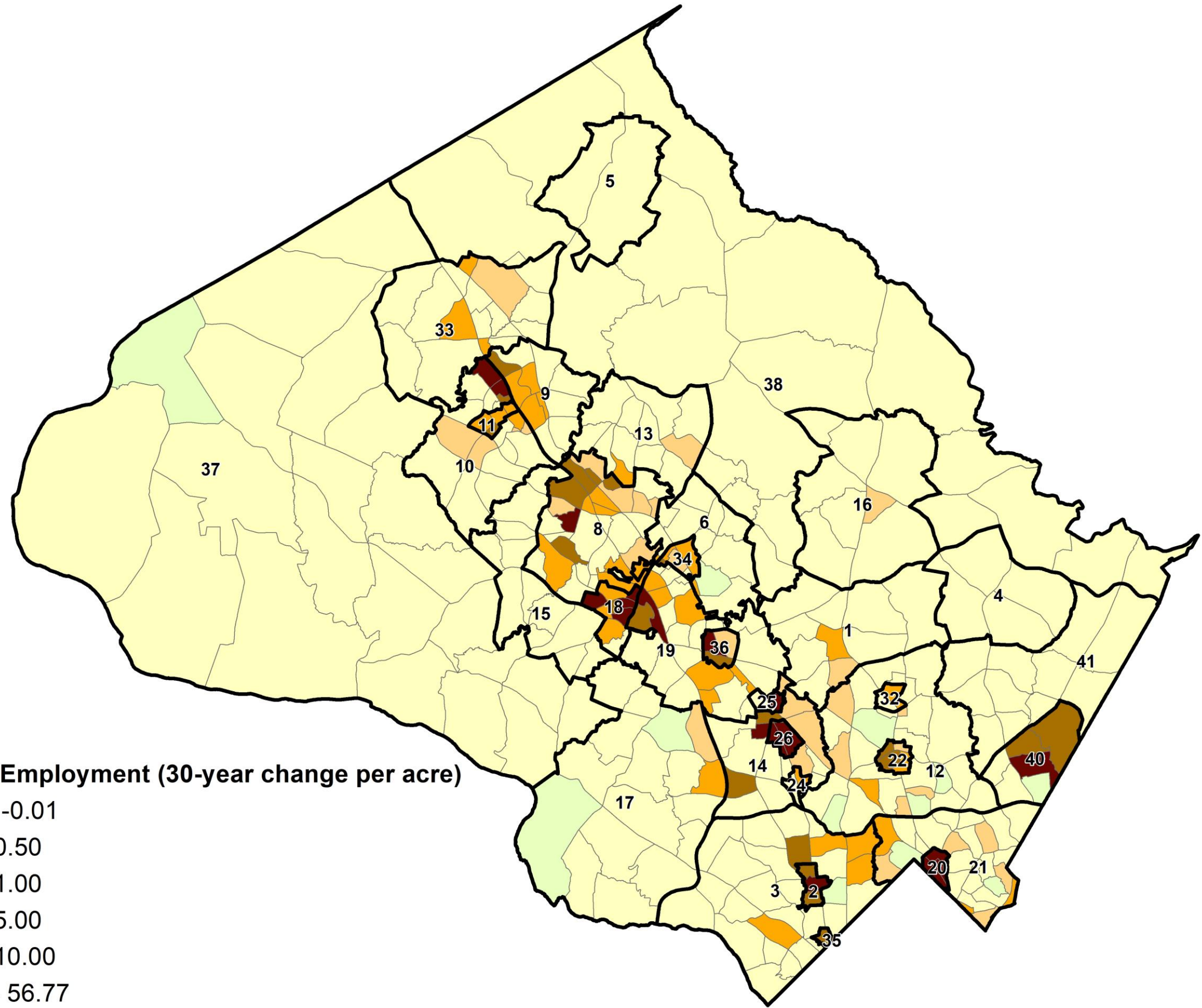
Employment Forecast Comparisons



Note: Numbers for absolute change rounded to the nearest hundred. Numbers for absolute change and percent change calculated from unrounded numbers.
 Source: MNCPPC, Montgomery Planning, Research and Strategic Projects.

Policy Areas

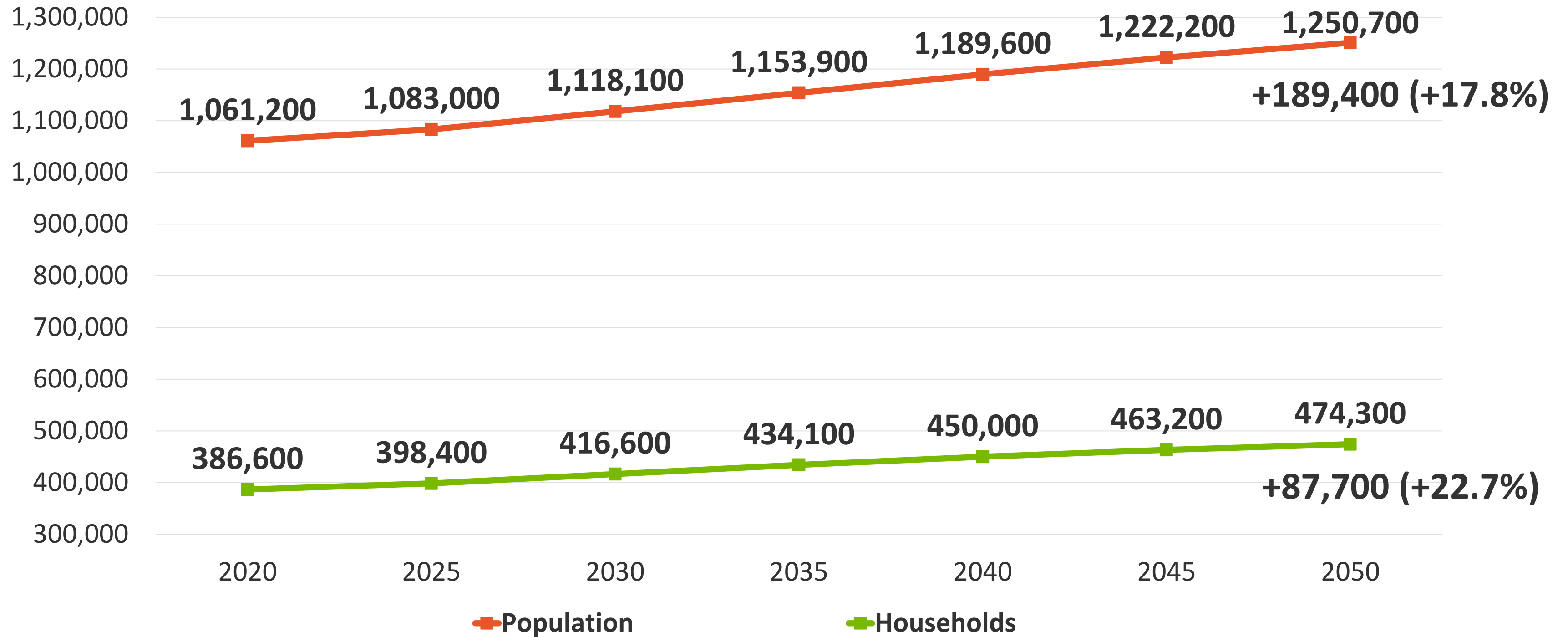
1 - Aspen Hill	19 - Rockville City
2 - Bethesda CBD	20 - Silver Spring CBD
3 - Bethesda/ Chevy Chase	21 - Silver Spring/ Takoma Park
4 - Cloverly	22 - Wheaton CBD
5 - Damascus	24 - Grosvenor
6 - Derwood	25 - Twinbrook
8 - Gaithersburg City	26 - White Flint
9 - Germantown East	32 - Glenmont
10 - Germantown West	33 - Clarksburg
11 - Germantown Town Center	34 - Shady Grove Metro Station
12 - Kensington/Wheaton	35 - Friendship Heights
13 - Montgomery Village/Airpark	36 - Rockville Town Center
14 - North Bethesda	37 - Rural West
15 - North Potomac	38 - Rural East
16 - Olney	40 - White Oak
17 - Potomac	41 - Fairland/Colesville
18 - R&D Village	



Source: MNCPPC, Montgomery Planning, Research and Strategic Projects.

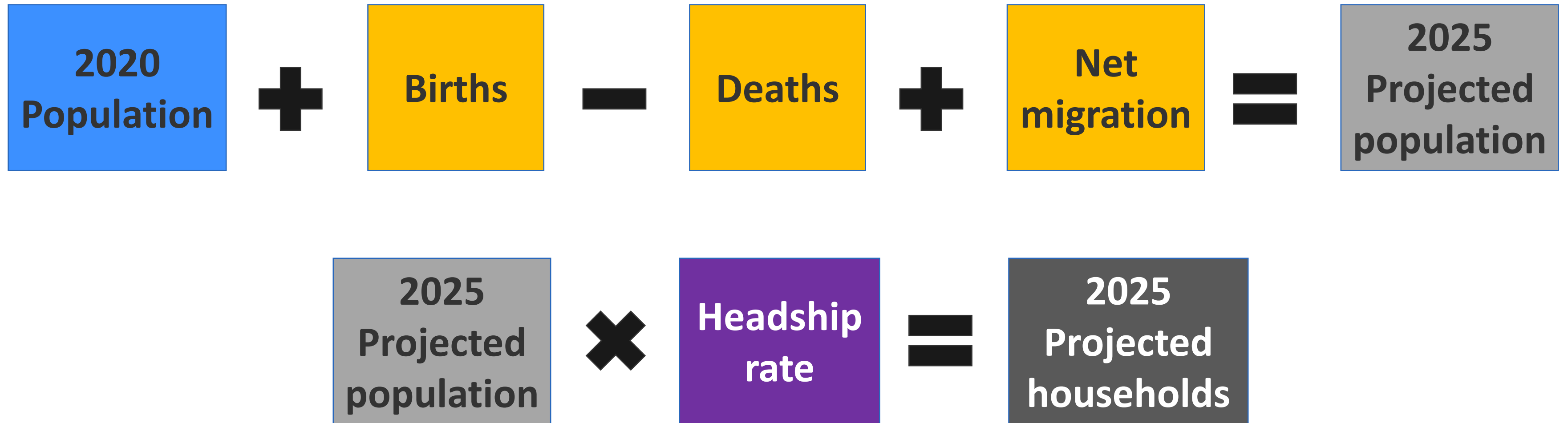
Population and Household Forecast

Population and Household Forecast: Round 10 Totals



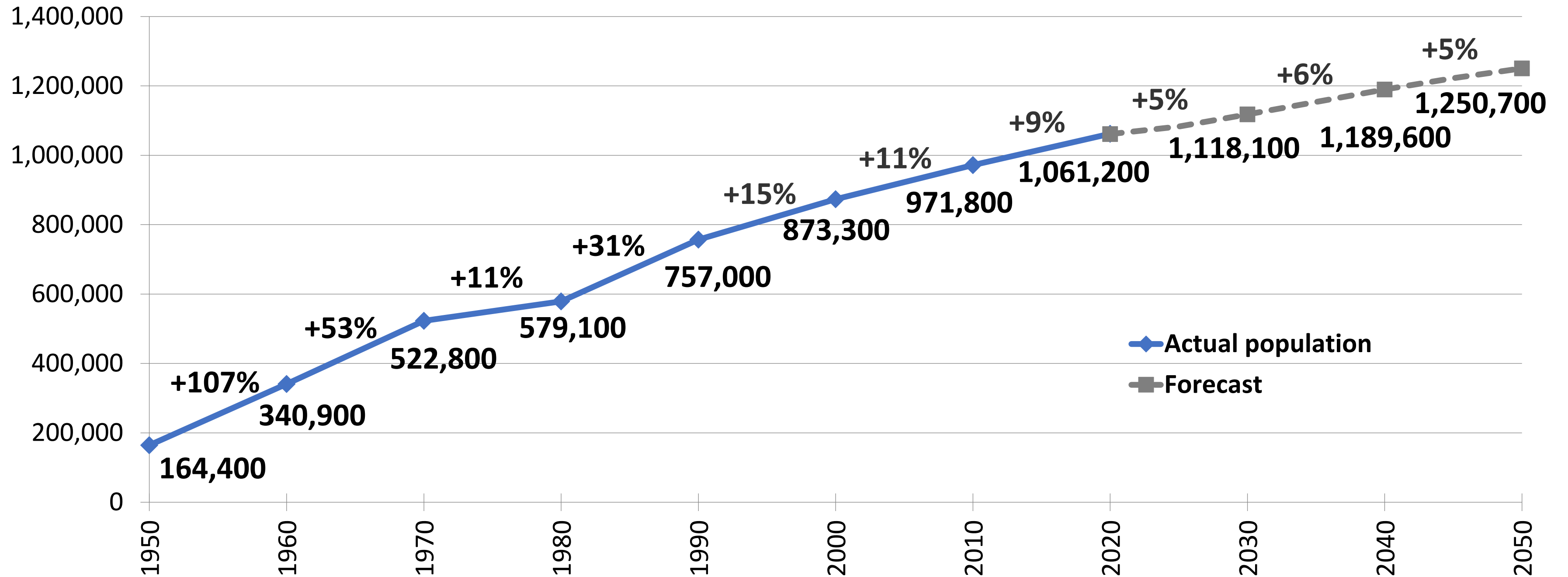
Note: Numbers for population, households, and absolute change rounded to the nearest hundred. Numbers for absolute change and percent change calculated from unrounded numbers.
Source: MNCPPC, Montgomery Planning, Research and Strategic Projects.

Methodology: Age Cohort Component of Change Model



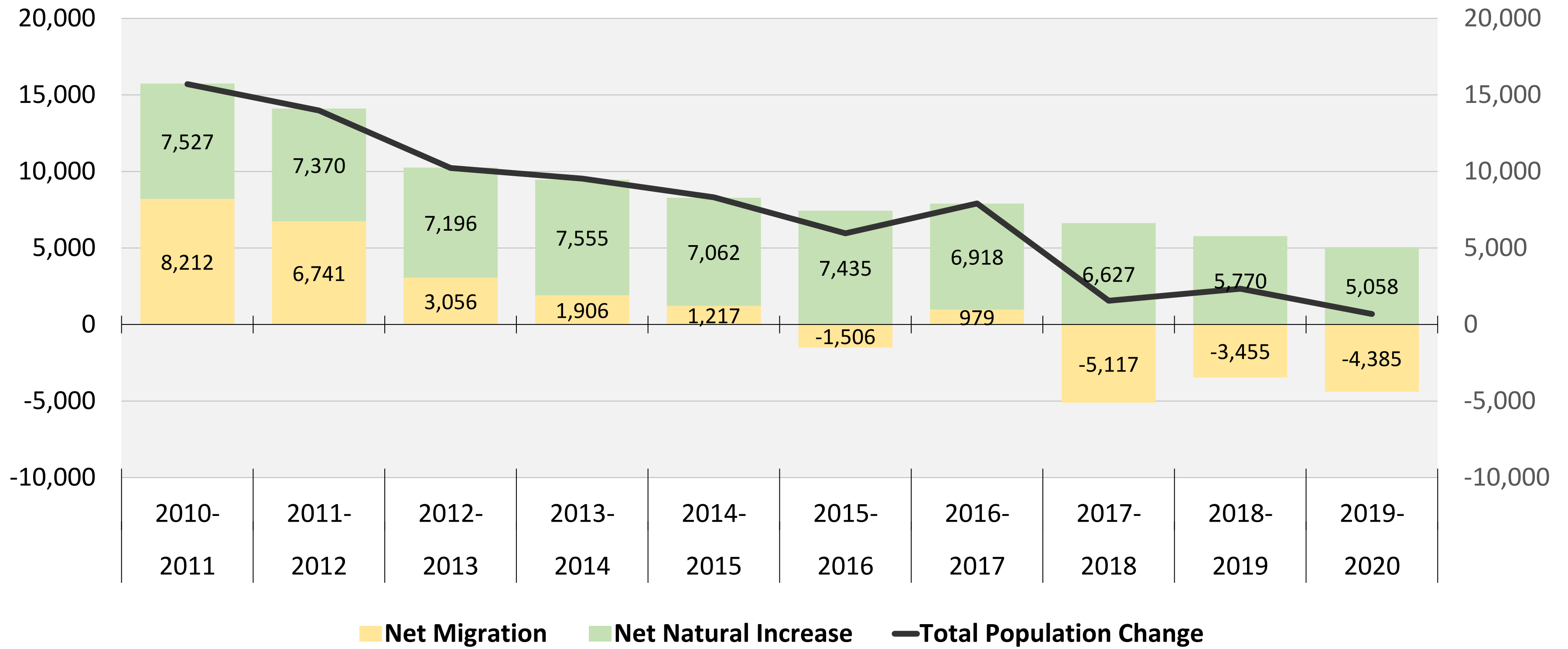
Repeat for 5-year increments (2025-2030, 2030-2035, etc. to 2050)

Population Growth at Decreasing Rate



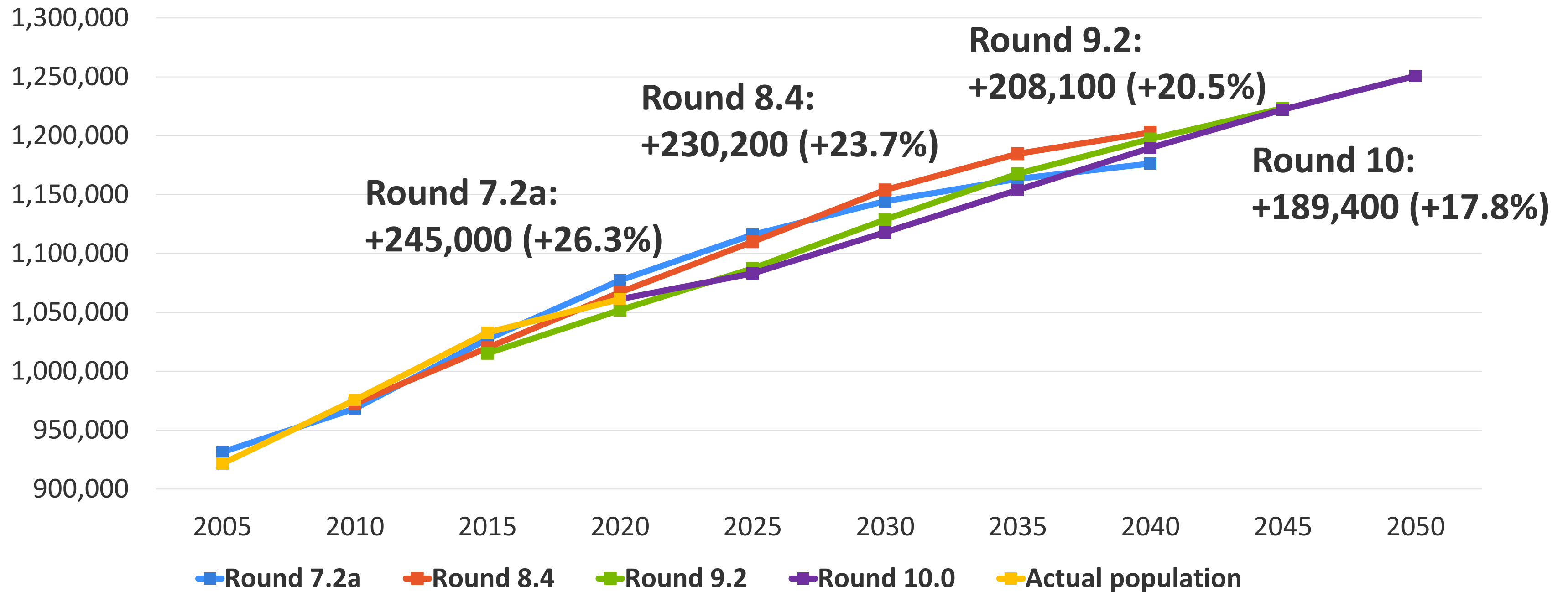
Note: Numbers for population rounded to the nearest hundred.
Source: U.S. Census Bureau; MNCPPC, Montgomery Planning, Research and Strategic Projects.

Components of Population Change



Source: U.S. Census Bureau, Population Estimates Program.

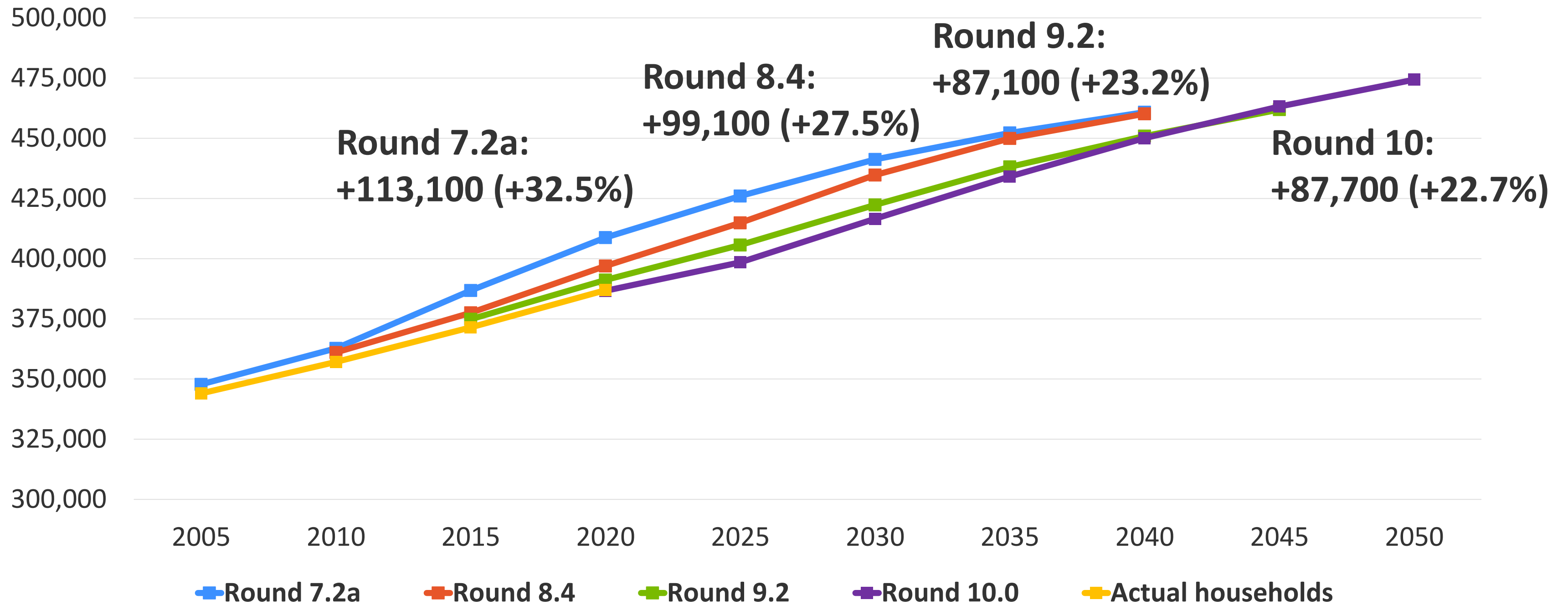
Population Forecast Comparisons



Note: Numbers for absolute change rounded to the nearest hundred. Numbers for absolute change and percent change calculated from unrounded numbers.

Source: MNCPPC, Montgomery Planning, Research and Strategic Projects.

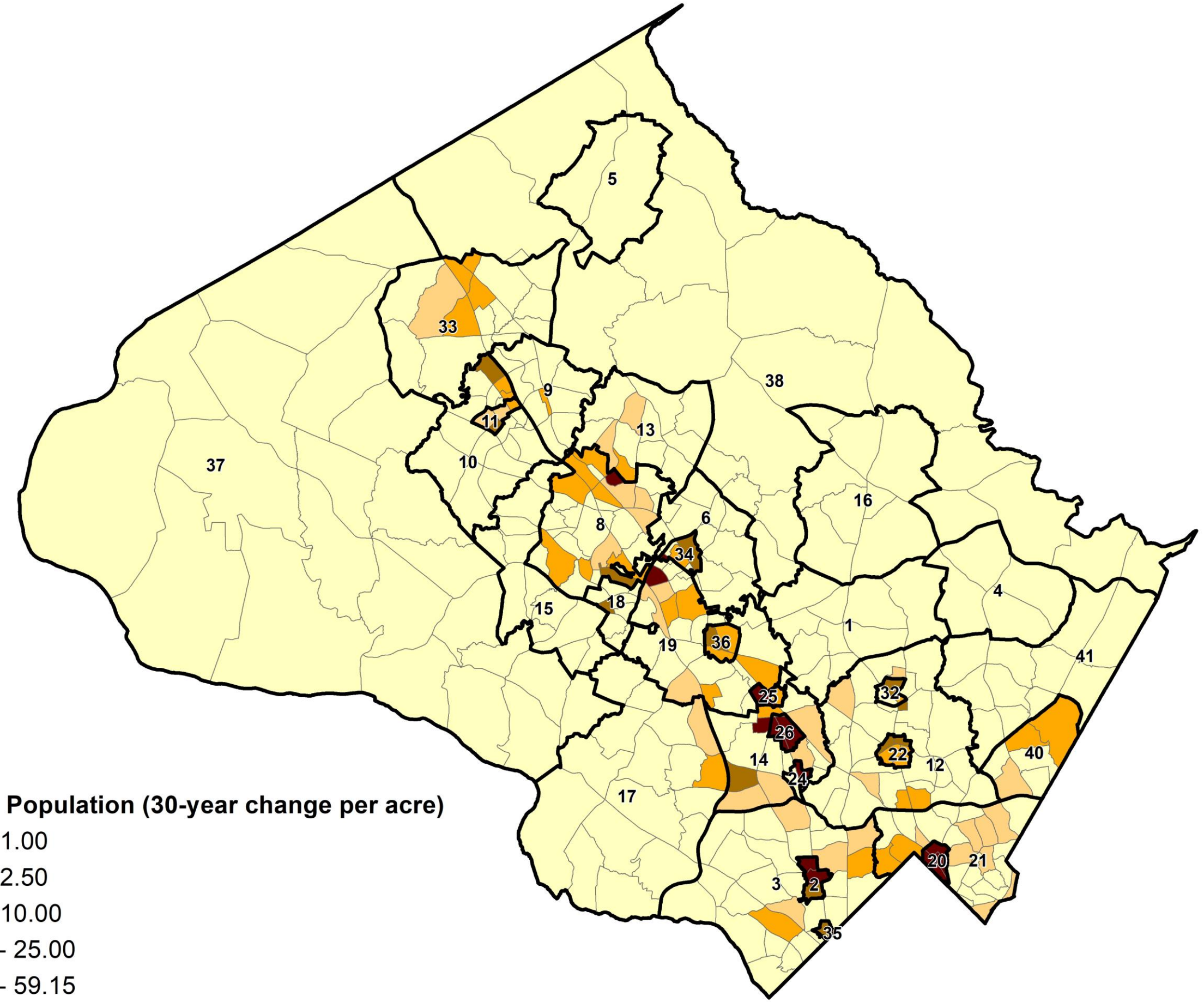
Household Forecast Comparisons



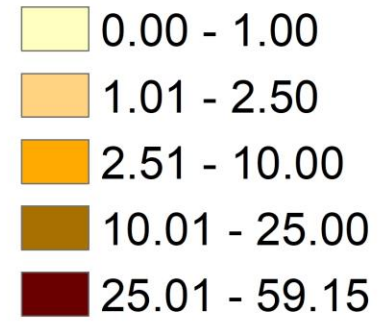
Note: Numbers for absolute change rounded to the nearest hundred. Numbers for absolute change and percent change calculated from unrounded numbers.
 Source: MNCPPC, Montgomery Planning, Research and Strategic Projects.

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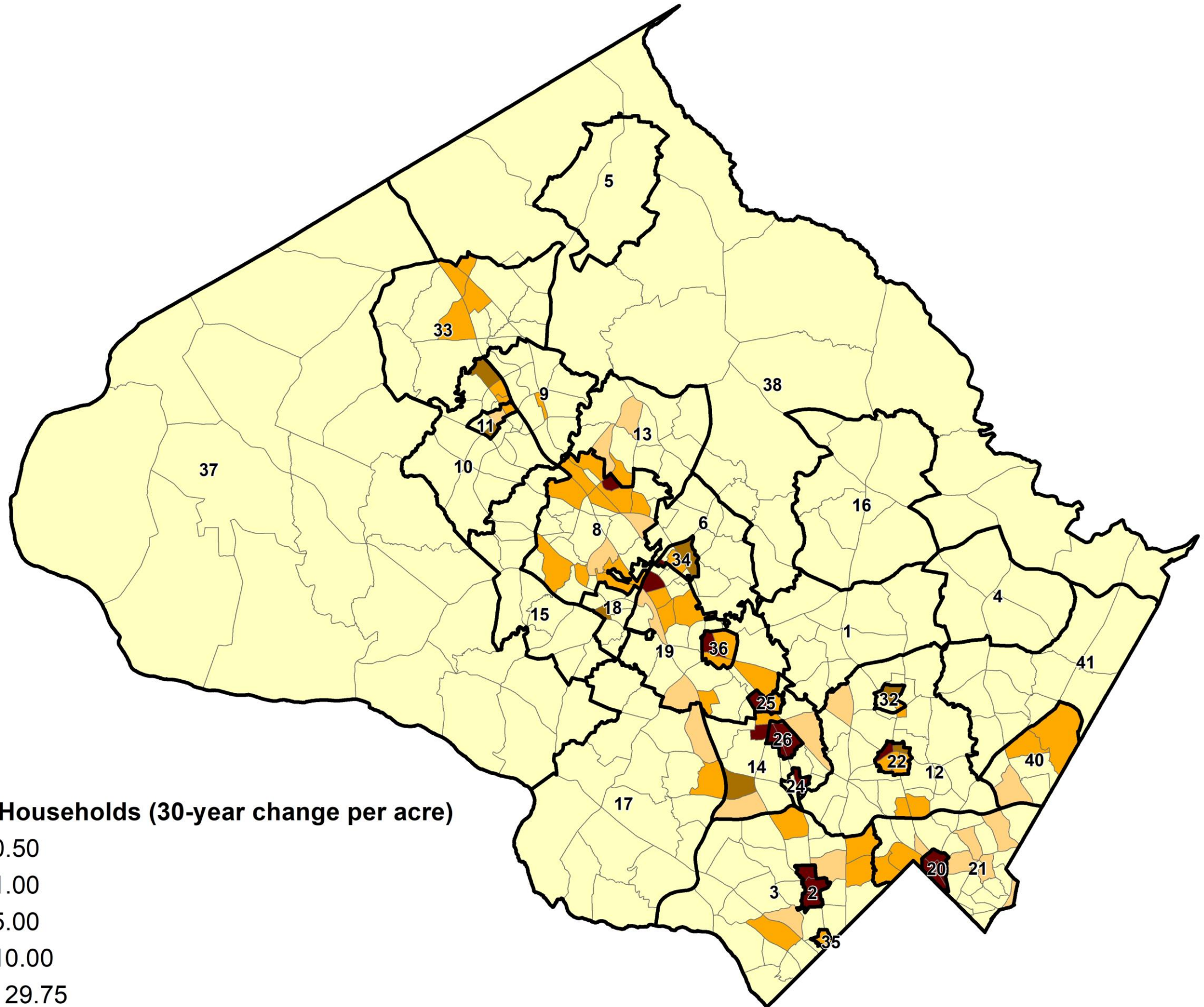
Round 10 Population (30-year change per acre)



Source: MNCPPC, Montgomery Planning, Research and Strategic Projects.

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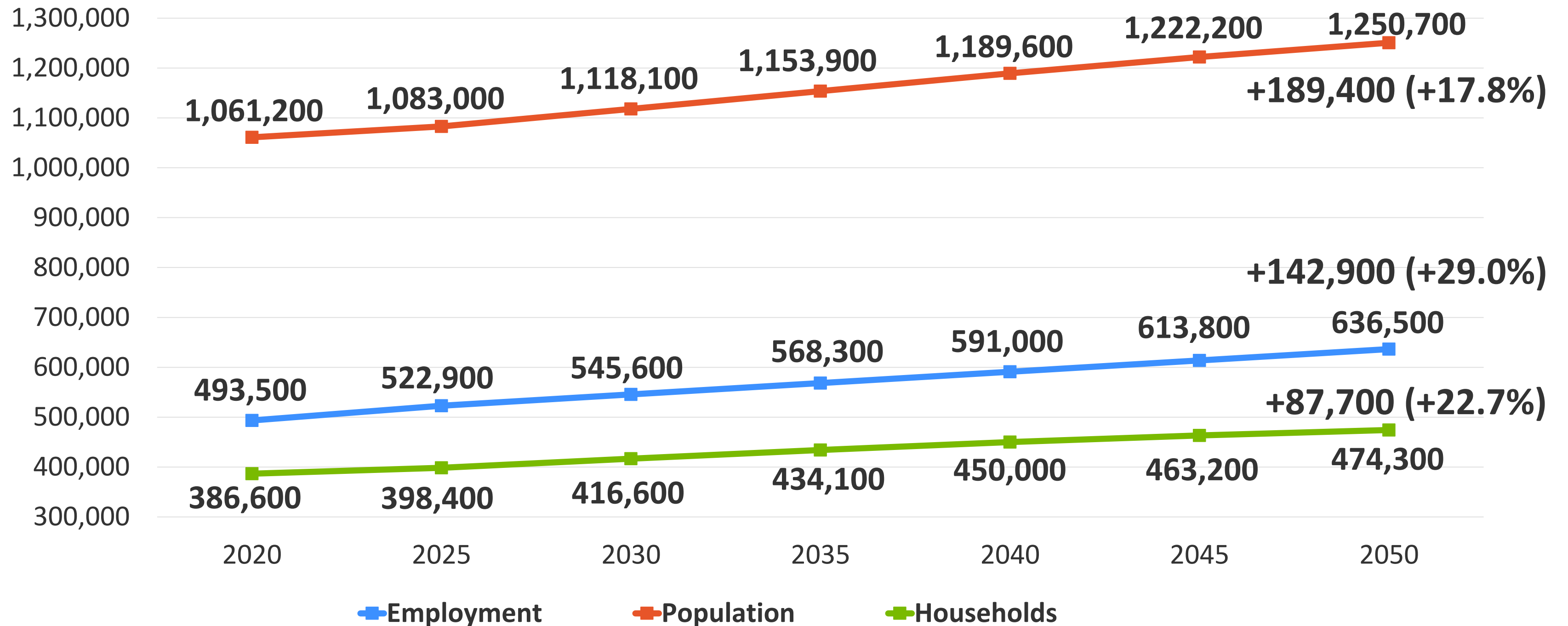
Round 10 Households (30-year change per acre)

- 0.00 - 0.50
- 0.51 - 1.00
- 1.01 - 5.00
- 5.01 - 10.00
- 10.01 - 29.75

Source: MNCPPC, Montgomery Planning, Research and Strategic Projects.

Summary

Population, Household, and Employment Forecast: Round 10 Totals for Montgomery County



Note: Numbers for population, employment, households, and absolute change rounded to the nearest hundred. Numbers for absolute change and percent change calculated from unrounded numbers.
 Source: MNCPPC, Montgomery Planning, Research and Strategic Projects.

Q&A