Briefing on the Preliminary Round 7.2 Cooperative Forecasts

Metropolitan Development Policy Committee
Timothy Canan, AICP
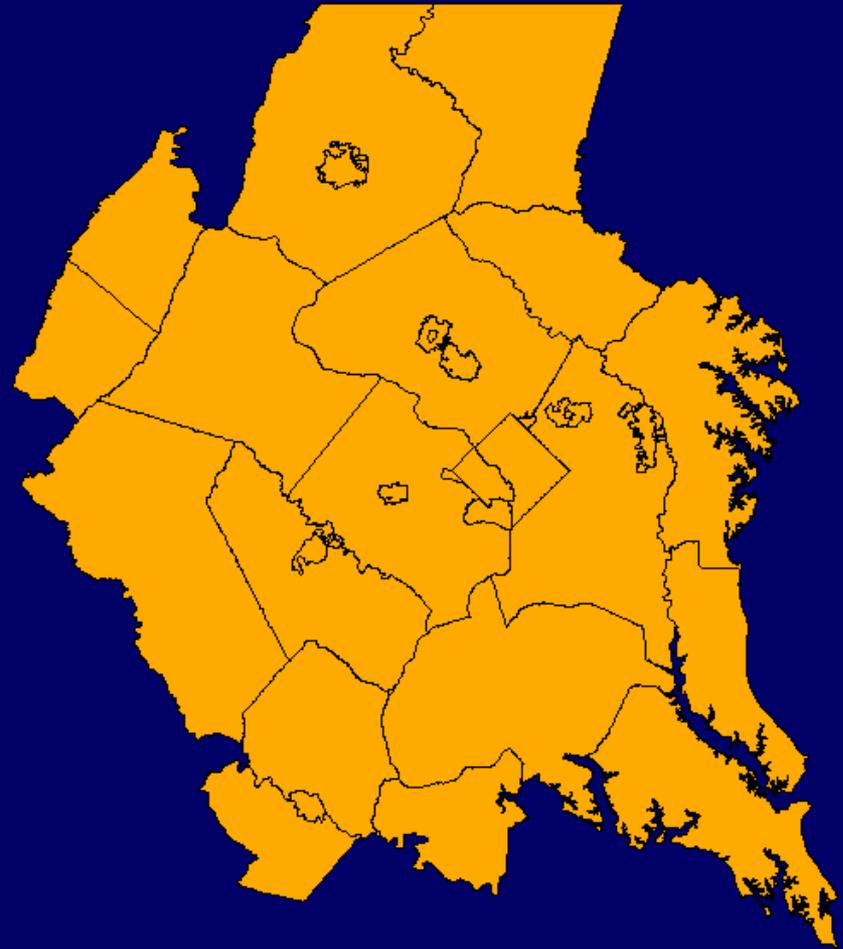**Gregory Goodwin**

January 14, 2009

Background

The Round 7.2 Cooperative Forecasts . . .

. . . are an annual update to Round 7.1. Jurisdictions have the opportunity to provide updated forecasts based on new developments or land use decisions, but they are not required to provide updates.

. . . will be used in upcoming Air Quality Conformity Analysis through the 2030 forecast period.

. . . will be followed next year by Round 8.0, which will be used in the 2010 CLRP Update.

Forecasts for all jurisdictions in the TPB Modeled Area are included in Round 7.2.
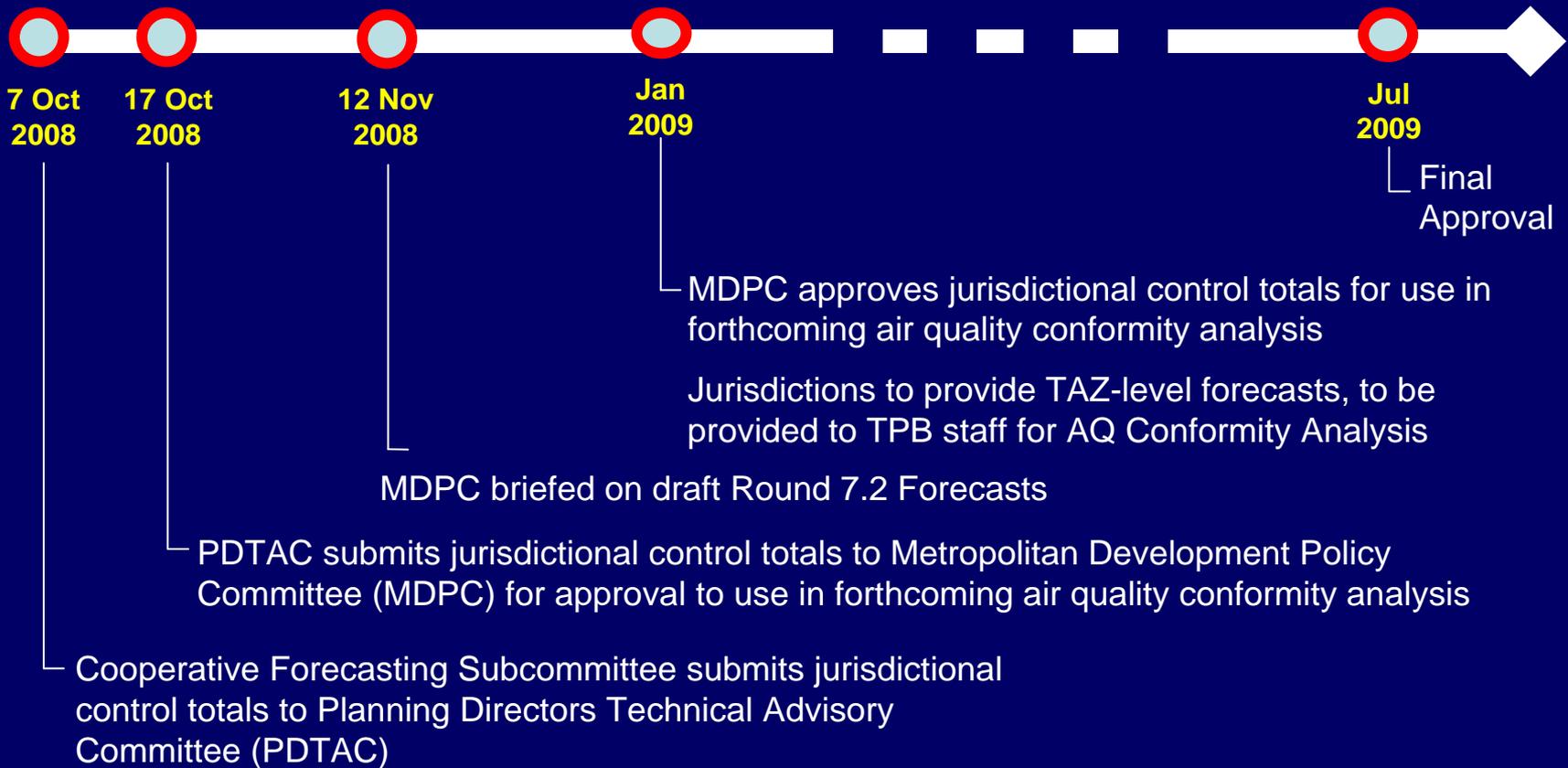
- **COG Members**
- **BMC Counties in TPB Modeled Area**
  - **Anne Arundel, Carroll & Howard**
- **Tri-County Council**
  - **Calvert, Charles & St. Mary's**
- **FAMPO**
  - **Fredericksburg, King George, Spotsylvania & Stafford**
- **Others**
  - **Clarke, Fauquier & Jefferson**

Jurisdictions modeled by TPB are grouped geographically for analysis purposes.

Central Jurisdictions	Inner Suburbs	Outer Suburbs	Outer Ring
• District of Columbia • Arlington • Alexandria	• Montgomery • Prince George's • Fairfax (County) • Fairfax (city) • Falls Church	• Loudoun • Prince William • Manassas • Manassas Park • Calvert • Charles • Frederick County (MD) • Stafford	• Anne Arundel • Carroll • Howard • Fredericksburg • King George • Spotsylvania (portion) • Clarke • Fauquier • Jefferson (WV) • St. Mary's

Round 7.2 approval timeline

7 Oct 2008

17 Oct 2008

12 Nov 2008

Jan 2009

Jul 2009

Final Approval

MDPC approves jurisdictional control totals for use in forthcoming air quality conformity analysis

Jurisdictions to provide TAZ-level forecasts, to be provided to TPB staff for AQ Conformity Analysis

MDPC briefed on draft Round 7.2 Forecasts

PDTAC submits jurisdictional control totals to Metropolitan Development Policy Committee (MDPC) for approval to use in forthcoming air quality conformity analysis

Cooperative Forecasting Subcommittee submits jurisdictional control totals to Planning Directors Technical Advisory Committee (PDTAC)

Key Findings and Trends

2030 Comparison by Subarea: R7.1 and R7.2
TPB Modeled Area

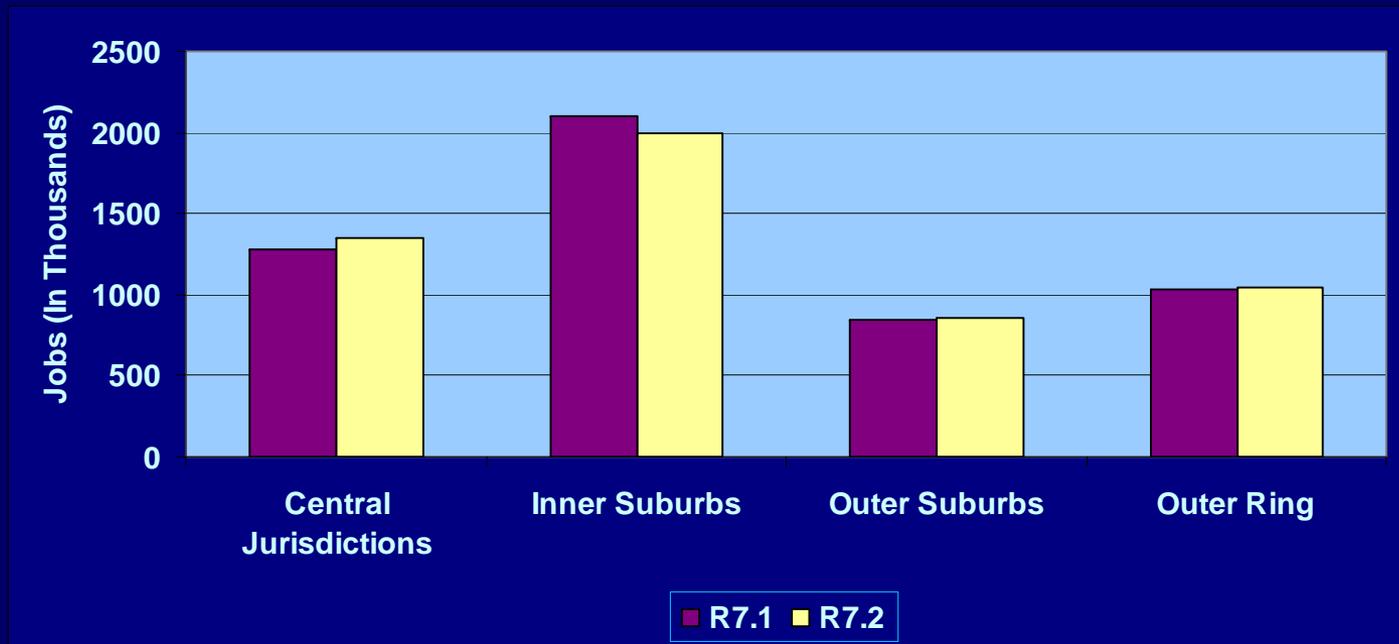| Subarea	Employment		Households		Population	
	Change (#) (1000s)	% Change	Change (#) (1000s)	% Change	Change (#) (1000s)	% Change
Central Jurisdictions	69.5	5.4%	11.6	2.2%	16.0	1.4
Inner Suburbs	-100.9	-4.8%	-34.0	-2.6%	-133.8	-3.8%
Outer Suburbs	6.3	0.7%	-4.6	-0.7%	-33.4	-1.7%
Outer Ring	11.6	1.1%	4.3	0.6%	13.8	0.8
TPB Modeled Area	-13.5	-0.3%	-22.7	-0.7%	-137.5	-1.7%

- Central Jurisdictions and Outer Ring increase
- Outer Suburbs increase in jobs and decrease in households and population
- Declines in Inner suburbs offset growth elsewhere, resulting in overall decrease for the modeled area.

2030 Key Changes in Employment Forecasts between Round 7.1 and Round 7.2

TPB Modeled Area

Employment Decreases in Inner suburbs outweigh increases in all other areas.

- DC, Arlington, & Alexandria all increased.
- Fairfax and Prince George's counties account for more than 90% of Inner Suburb decrease, while Montgomery County netted no change by 2030.
- Loudoun decreased by 15,500 while Prince William increased by 21,000 in Outer Suburbs
- St. Mary's and Anne Arundel increased by 10,000 and 5,400, respectively, in Outer Ring.
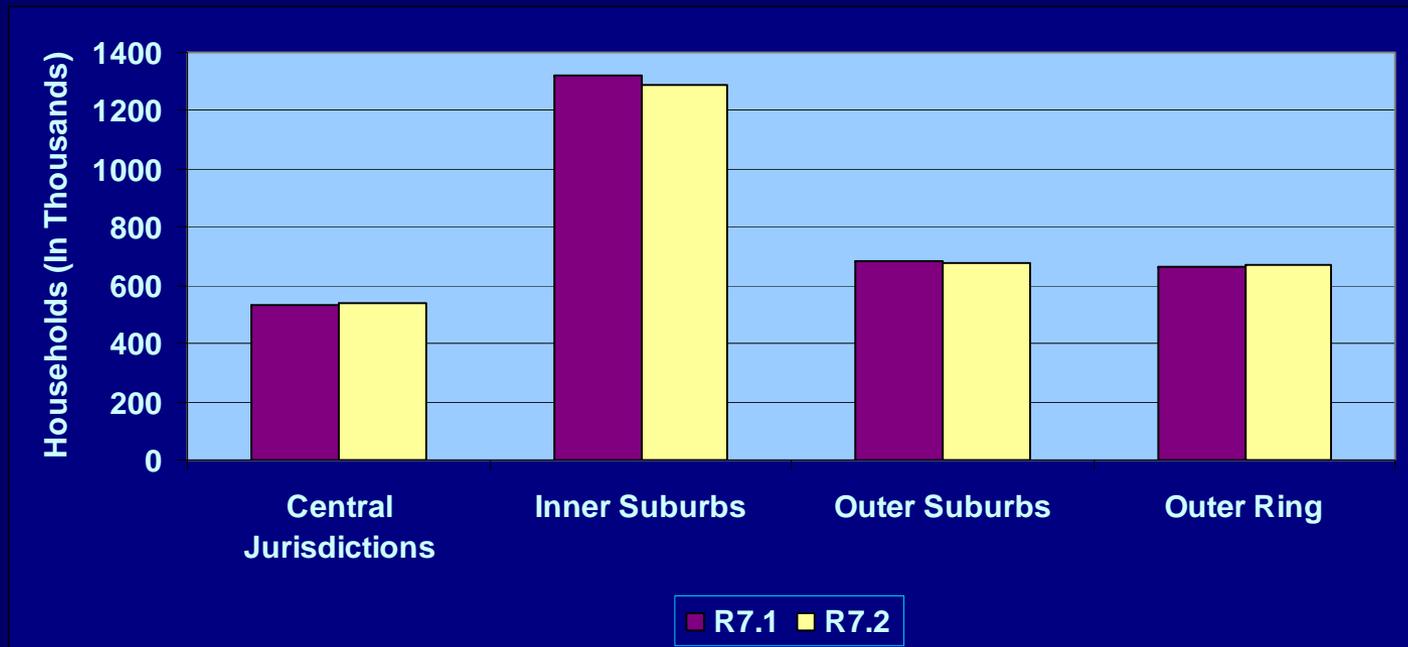
2030 Key Changes in Household Forecasts between Round 7.1 and Round 7.2

TPB Modeled Area

Household increases in Central Jurisdictions and Outer Ring fall short of higher decreases in Inner and Outer Suburbs
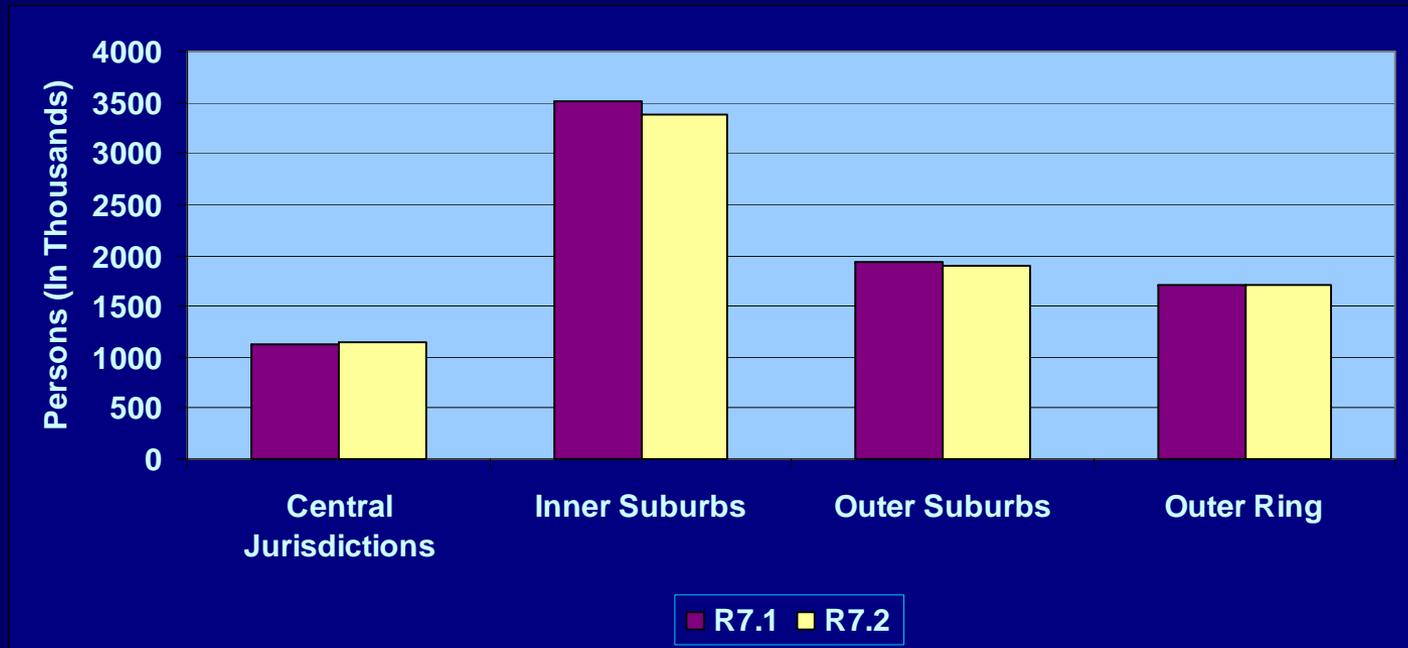
- Largest decreases occurred in Fairfax County (-19,400), Prince George's County (-11,900) and Loudoun County (-10,000).
- Largest increases occurred in St. Mary's County (+10,000) and the District of Columbia (+9,400).

2030 Key Changes in Population Forecasts between Round 7.1 and Round 7.2

TPB Modeled Area

Changes in population forecasts are commensurate with changes in household forecasts.

Key Drivers: Round 7.1 vs. Round 7.2

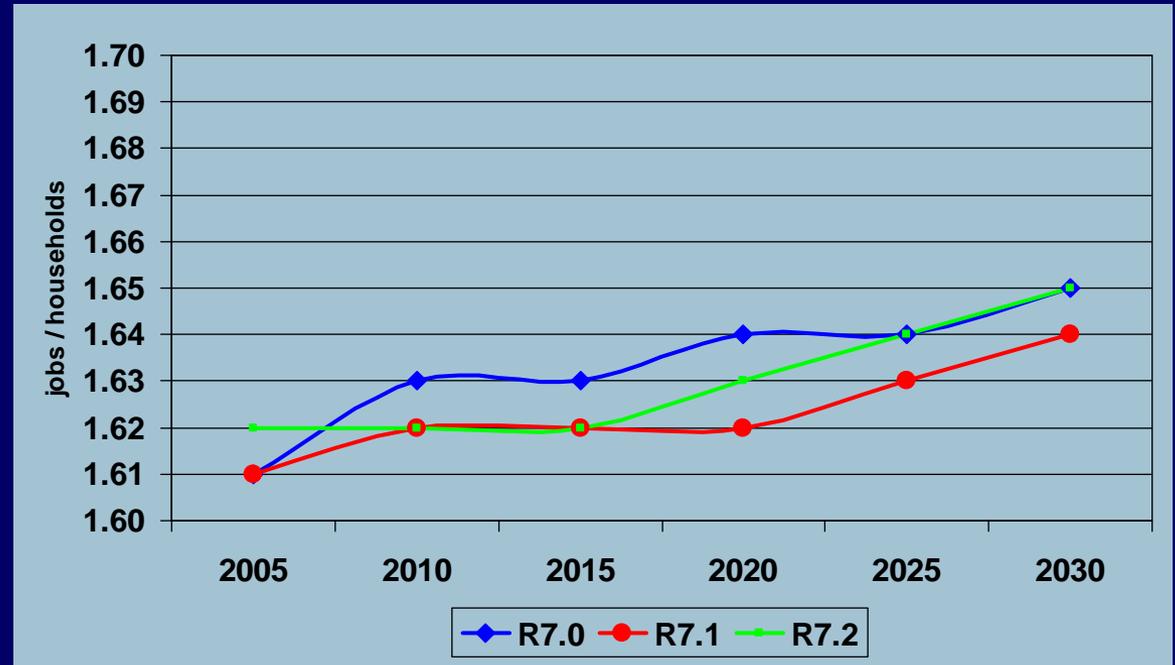| Jurisdiction	Key Projects/Assumptions	2030 Change from R7.1
District of Columbia	• New development near Baseball stadium • NY Avenue/Arboretum • Saint Elizabeth's redevelopment • Poplar Point • SW Waterfront Mall • Overhaul of school system • Higher energy costs to guide growth toward core	+ 41K jobs + 17.6K persons + 9.4K households
Fairfax County	• Recent Army decision to relocate 6.4K BRAC jobs from U.S. Army Garrison Fort Belvoir (Ffx Co) to Mark Center (Alexandria) • Slower employment growth trends due to current economic conditions and higher office vacancies • Change in population forecasting methodology may indicate lower household size in the future.	– 27.9K jobs – 96.8K persons – 19.4K households
Montgomery County	• Short term job and residential losses compared to Round 7.1 to be offset by increases in long term	minor changes

Key Drivers: Round 7.1 vs. Round 7.2 (cont'd)

Jurisdiction	Key Projects/Assumptions	2030 Change from R7.1
Prince George's County	• Slower growth in jobs and multi-family housing • Increased growth in single-family housing	– 64.2K jobs – 31.1K persons – 11.9K households
Loudoun County	• Recent development and rezonings affecting residential and non-residential pipeline and development capacity • Housing market conditions • Economic conditions	– 15.5K jobs – 31.9K persons – 10.0K households
Prince William County	• Housing market conditions resulting in slower residential increases • Evaluation of employment trend data and increasing share of regional employment resulting in faster job growth	+ 21.0K jobs – 12.6K persons – 1.3K households

Jobs-Households Ratio Comparison

TPB Modeled Area

- Comparable jobs-hh ratios between R7.1 and R7.2 through 2015

- R7.2 jobs-hh ratio rises slightly higher after 2015, matching R7.0 ratio by 2030

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Employment (jobs) Comparison Throughout Forecast Period

TPB Modeled Area

Employment (In Thousands)

	2005	2010	2015	2020	2025	2030
Round 7.1	3789.1	4159.1	4468.3	4765.4	5031.8	5261.6
Round 7.2	3780.3	4079.3	4395.1	4724.9	5004.2	5248.1
Change (#)	-8.9	-79.8	-73.2	-40.5	-27.7	-13.5
Percent Change (%)	-0.2%	-1.9%	-1.6%	-0.9%	-0.5%	-0.3%

R7.2 job forecasts decrease more in near-term (2010 and 2015), but rebound in long-term to just under R7.1 levels.

Household Comparison Throughout Forecast Period

TPB Modeled Area

Households (In Thousands)

	2005	2010	2015	2020	2025	2030
Round 7.1	2357.3	2566.1	2764.5	2935.6	3080.9	3200.0
Round 7.2	2338.3	2521.1	2712.9	2892.8	3047.5	3177.3
Change (#)	-18.9	-45.0	-51.6	-42.9	-33.4	-22.7
Percent Change (%)	-0.8%	-1.8%	-1.9%	-1.5%	-1.1%	-0.7%

Like job forecasts, R7.2 household forecasts decrease more in near-term (2010 and 2015), but rebound in long-term to just under R7.1 levels.

Population Comparison Throughout Forecast Period

TPB Modeled Area

Persons (In Thousands)

	2005	2010	2015	2020	2025	2030
Round 7.1	6294.5	6808.8	7260.4	7668.9	8003.8	8282.4
Round 7.2	6270.9	6663.5	7074.5	7486.3	7845.7	8144.9
Change (#)	-23.7	-145.3	-189.9	-182.6	-158.1	-137.5
Percent Change (%)	-0.4%	-2.2%	-2.6%	-2.4%	-2.0%	-1.7%

Next Steps . . .

- MDPC approves Round 7.2 forecast control totals for testing in FY2009 Air Quality Conformity Analysis

- Jurisdictions submit TAZ-level forecasts (January)

- TAZ-level Round 7.2 data provided to TPB staff for Air Quality Conformity Analysis (January)

- Final COG Board approval of R7.2 made concurrently with TPB approval of Air Quality Conformity Assessment for the 2009 CLRP and FY2010-2015 TIP in July 2009. (June)

Questions . . .