Draft Round 7.2 Cooperative Forecasts of Population, Households, and Employment

TPB Technical Committee
Timothy Canan, AICP
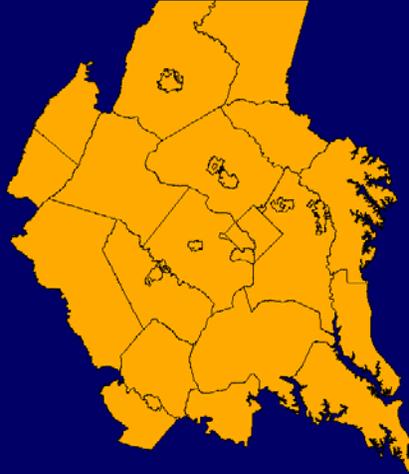
April 4, 2009

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The Round 7.2 Cooperative Forecasts . . .

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

. . . were extended to **2040**, at request of NVRC and ICPRB for drought and water supply planning.

. . . 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.

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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**
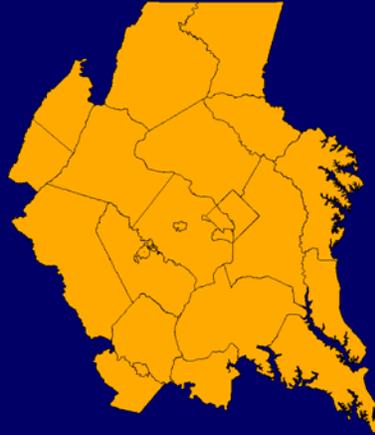- **Others**
  - **Clarke, Fauquier & Jefferson**

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Round 7.2 approval timeline

7 Oct 2008

17 Oct 2008

12 Nov 2008

14 Jan 2009

Jul 2009

Final COG Board 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 and Data Subcommittee submits jurisdictional control totals to Planning Directors Technical Advisory Committee (PDTAC)

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Jurisdictions modeled by TPB are grouped geographically for analysis purposes.

- **Central Jurisdictions**
- **Inner Suburbs**
- **Outer Suburbs**
- **Outer Ring**

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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

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Between 2005 and 2030, the region will continue to experience long-term growth.

- Jobs will grow faster than population and households.

- All indicators (EMP, POP & HH) will increase in the outer suburbs **more than twice** the rate of either the central jurisdictions or inner suburbs.
  - Inner suburbs will add the most new jobs
  - Outer suburbs will add the most persons and households

- The outer ring will experience more growth than the central jurisdictions.
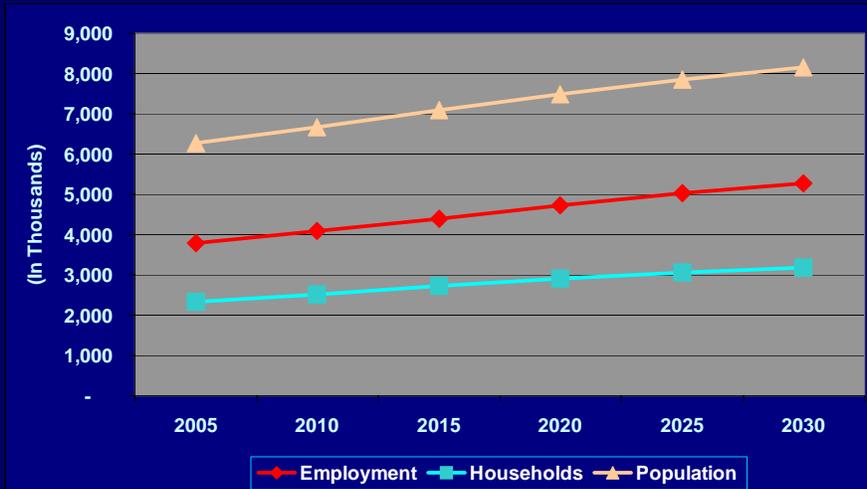
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Key differences between Round 7.1 and Draft Round 7.2 Forecasts

- Lower population and household forecasts throughout entire forecast period

- Lower employment forecasts throughout most of the forecast period, with a slight increase in 2030

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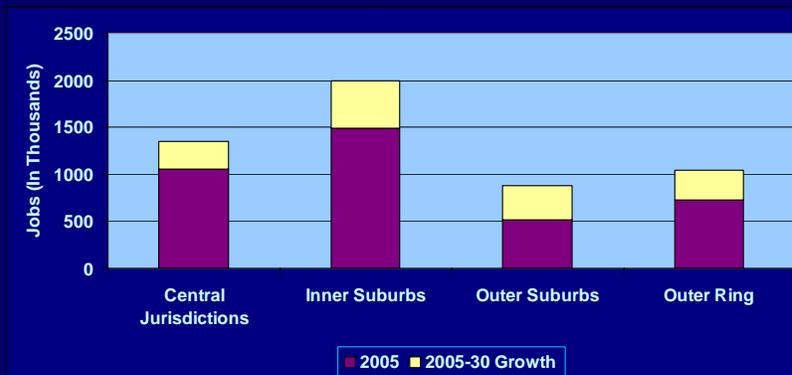## Between 2005 and 2030, jobs will grow the fastest and population will grow the most in the TPB Modeled Area.

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2005 – 2030 Employment Forecasts by Subarea: Round 7.2 Cooperative Forecasts
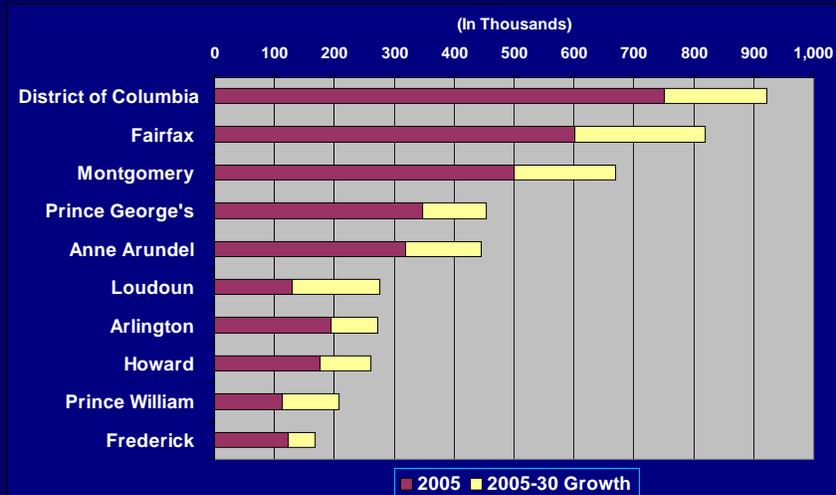**TPB Modeled Area**

- Central jurisdictions – less job growth than other portions of modeled area.
  - More than half of the job growth will occur in the District of Columbia
- Inner suburbs – *most* growth, expanding their large job base.
- Outer suburbs – *fastest* grow, increasing their job base by two-thirds.

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10-largest jurisdictions in <u>employment</u> in 2030
Round 7.2 Cooperative Forecasts
TPB Modeled Area

(In Thousands)

Jurisdiction	2005	2005-30 Growth

Chart with horizontal axis 0 to 1,000 (in thousands), marks at 0, 100, 200, 300, 400, 500, 600, 700, 800, 900, 1,000.

Jurisdictions (top to bottom):
- District of Columbia
- Fairfax
- Montgomery
- Prince George's
- Anne Arundel
- Loudoun
- Arlington
- Howard
- Prince William
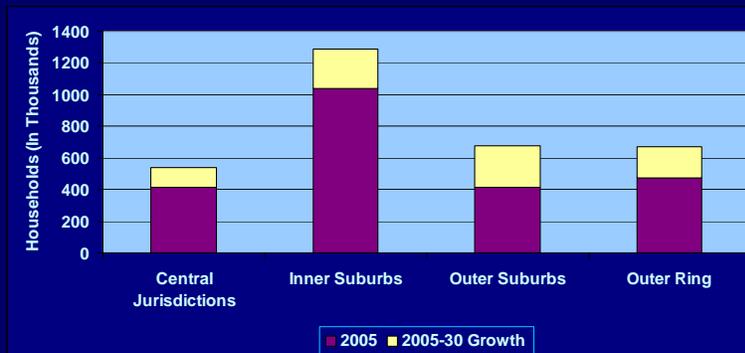- Frederick

Legend: ■ 2005   ■ 2005-30 Growth

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2005 – 2030 <u>Households</u> Forecasts by Subarea:
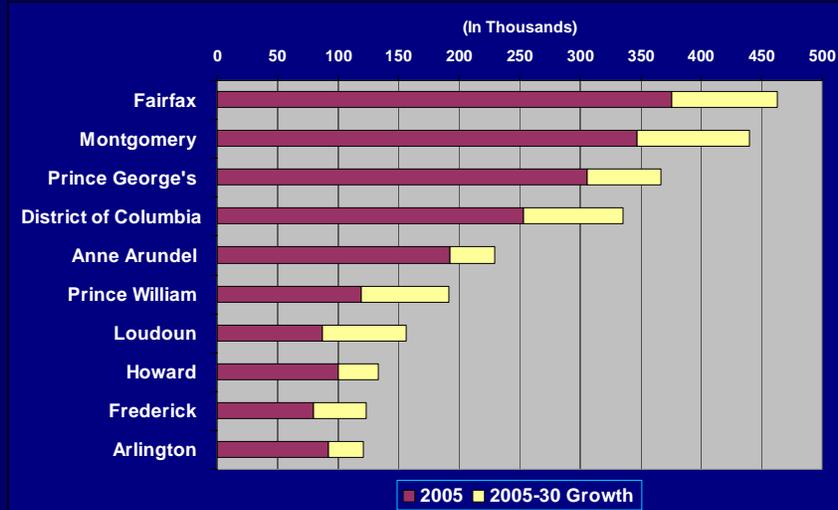## Round 7.2 Cooperative Forecasts
TPB Modeled Area

- Central jurisdictions – less household growth than other portions of modeled area.
- Outer suburbs – *most* and *fastest* growth
- Outer suburbs to have more households than central jurisdictions by 2030

Chart: Households (In Thousands), vertical axis 0 to 1400.

Categories: Central Jurisdictions, Inner Suburbs, Outer Suburbs, Outer Ring

Legend: ■ 2005   ■ 2005-30 Growth

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10-largest jurisdictions in <u>households</u> in 2030 Round 7.2 Cooperative Forecasts

TPB Modeled Area

(In Thousands)

Fairfax	
Montgomery	
Prince George's	
District of Columbia	
Anne Arundel	
Prince William	
Loudoun	
Howard	
Frederick	
Arlington	

0 50 100 150 200 250 300 350 400 450 500

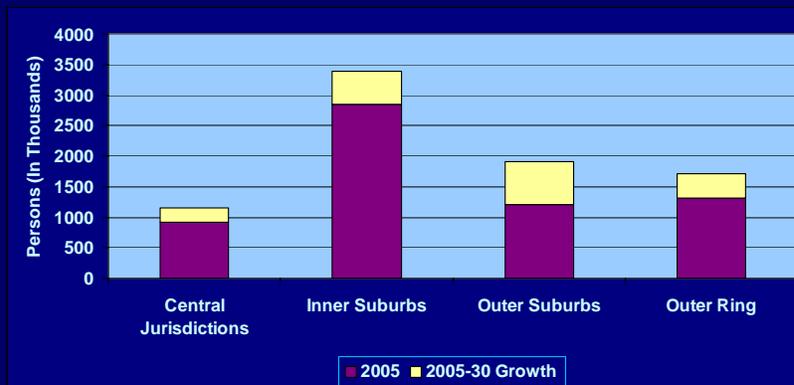■ 2005 ■ 2005-30 Growth

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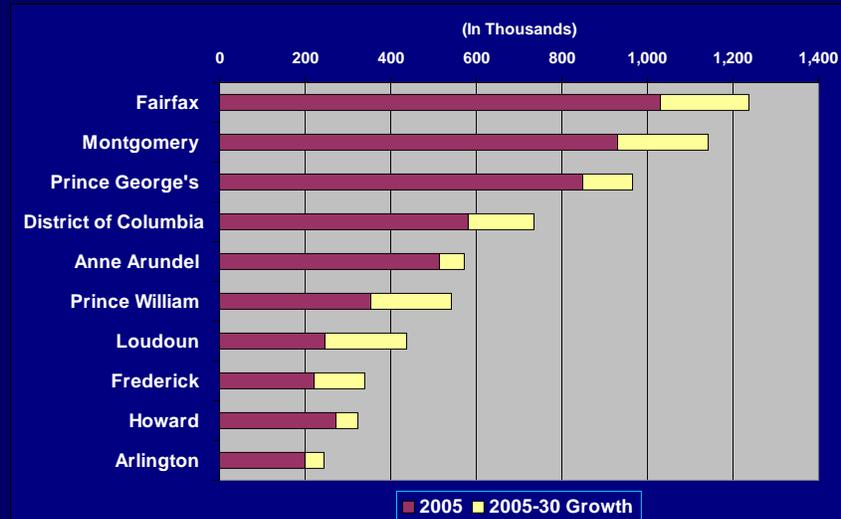## 2005 – 2030 <u>Population</u> Forecasts by Subarea: Round 7.2 Cooperative Forecasts

TPB Modeled Area

Population will not grow as fast as households, resulting in overall declines in average household size.

Persons (In Thousands)

4000
3500
3000
2500
2000
1500
1000
500
0

Central Jurisdictions — Inner Suburbs — Outer Suburbs — Outer Ring

■ 2005 ■ 2005-30 Growth

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10-largest jurisdictions in population in 2030
Round 7.2 Cooperative Forecasts
TPB Modeled Area

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	69.6	5.4%	11.7	2.2%	20.2	1.8
Inner Suburbs	-100.9	-4.8%	-33.0	-2.5%	-131.4	-3.7%
Outer Suburbs	27.5	3.2%	-4.0	-0.6%	-30.4	-1.6%
Outer Ring	10.7	1.0%	7.0	1.1%	13.6	0.8
TPB Modeled Area	6.9	0.1%	-18.3	-0.6%	-128.0	-1.5%

- 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 in households and population, and a only slight overall increase in jobs.

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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 – 28.0K persons – 10.7K 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 in 2020, and slightly increasing in 2025 and 2030.

- Jobs-hh ratio over the forecast period ranges from 1.62 in 2005 to 1.66 in 2030

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Next Steps . . .

- COG staff completes review of TAZ-level forecasts submitted by local governments

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

- 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)

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