Briefing on the Draft Round 8.0 Cooperative Forecasts

Metropolitan Development Policy Committee

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Background

Cooperative Forecasting

- Established by COG in 1975 to develop a consistent set of local and regional household, population and employment projections based on common assumptions about future growth

- Forecasts are prepared under the direction of the Planning Directors Technical Advisory Committee (PDTAC) and reviewed and approved by the MDPC and COG Board

- Cooperative Forecasts are inputs for transportation, water and air quality modeling by COG and TPB, local government planning, and private sector market analysis

The Round 8.0 Cooperative Forecasts . . .

. . . will be used in conjunction with a new Household Travel Survey and a new Transportation Model

. . . include a new econometric benchmark forecasts based on revised assumptions of the U.S. economy

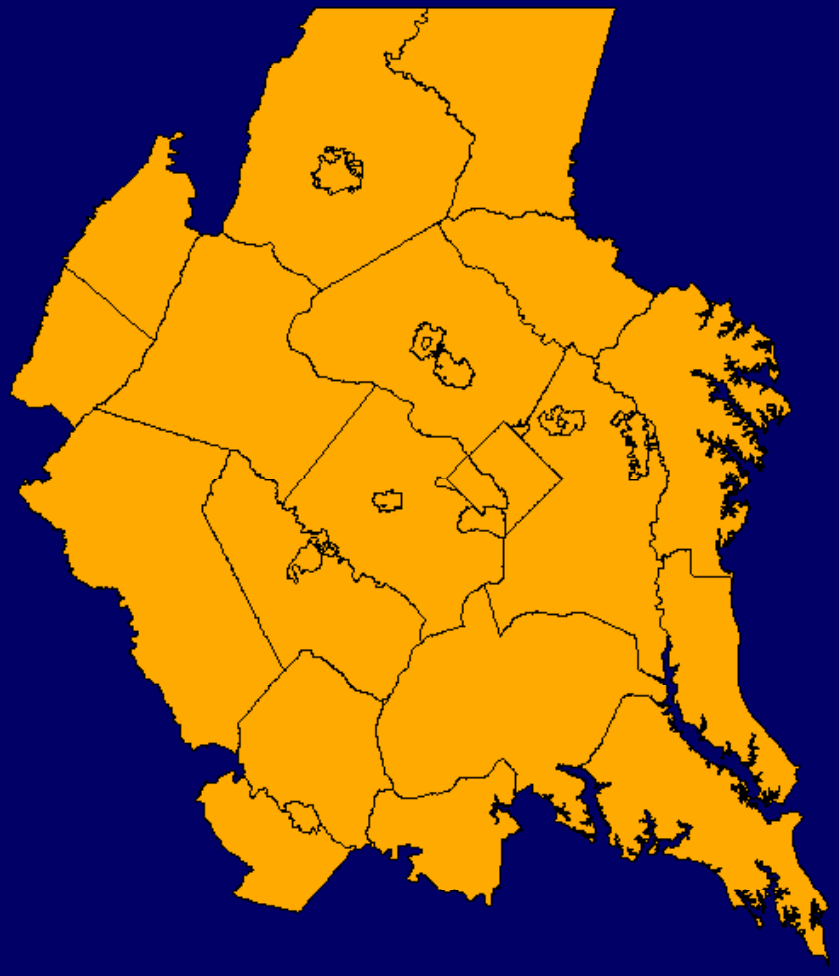
. . . include a new Traffic Analysis Zones (TAZs) structure (TPB TAZ 3,722) nearly double the number of TAZs from the previous Round 7 series

. . . will be used in upcoming Air Quality Conformity Analysis through the 2040 forecast period

. . . will be the basis for the next update to the COG Regional Activity Centers and Clusters

Forecasts for all jurisdictions in the TPB Modeled Area are included in Round 8.0.

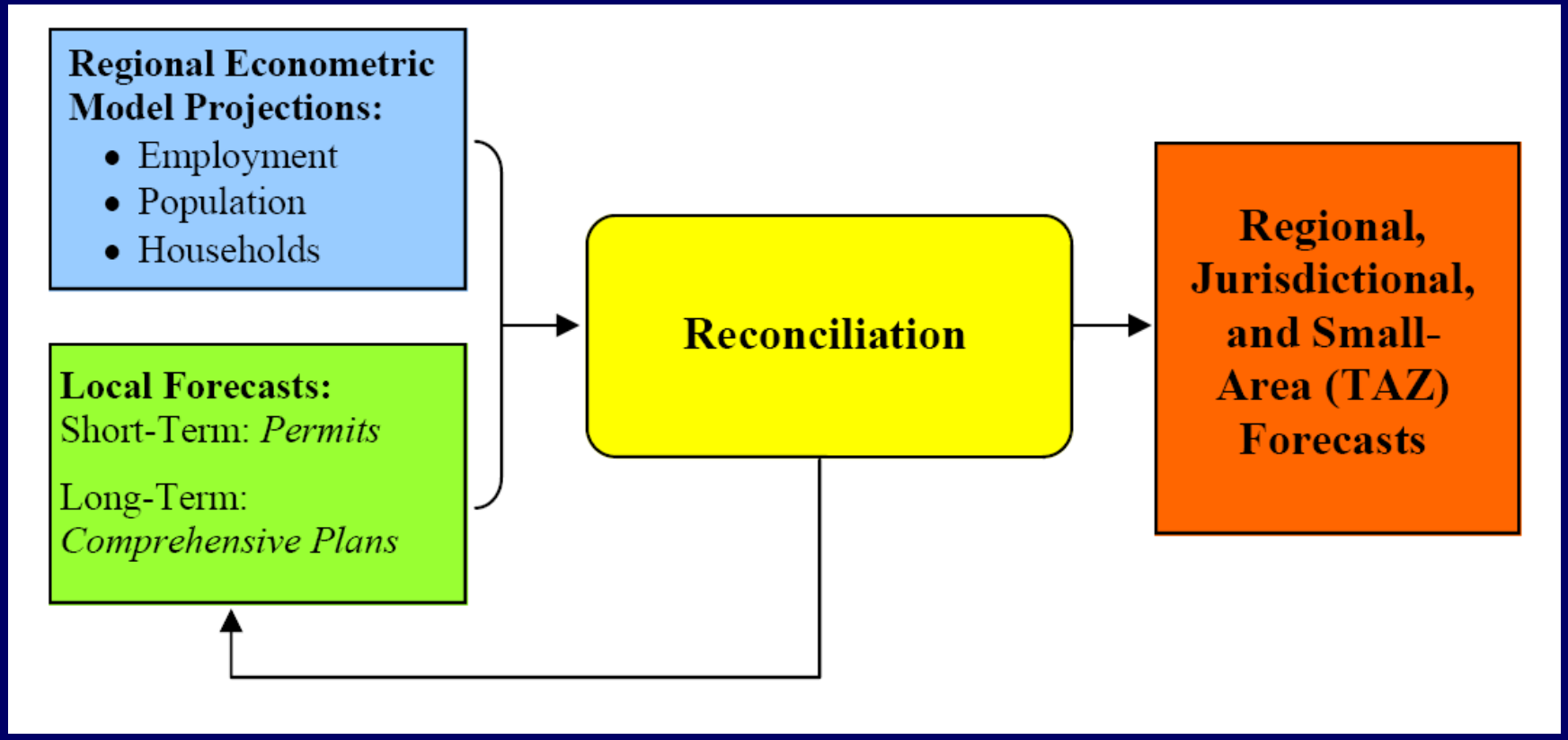
- COG Members
- BMC Counties in TPB Modeled Area
  - Anne Arundel, Carroll & Howard
- Tri-County Council
  - Calvert, Charles & St. Mary's
- FAMPO
  - Fredericksburg, King George, Spotsylvania & Stafford
- Others
  - Clarke, Fauquier & Jefferson



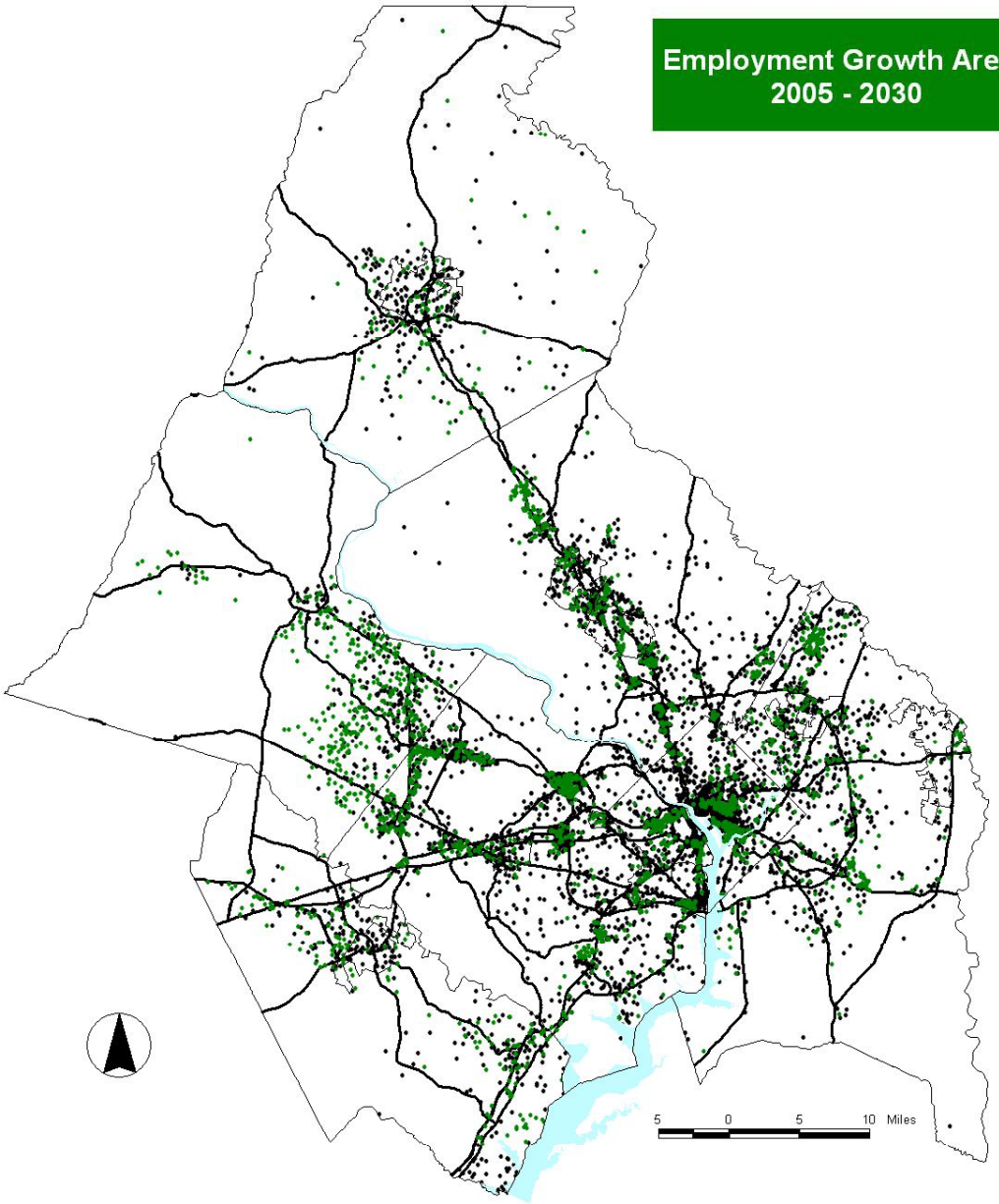
Jurisdictions modeled by TPB are grouped geographically for analysis purposes.

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

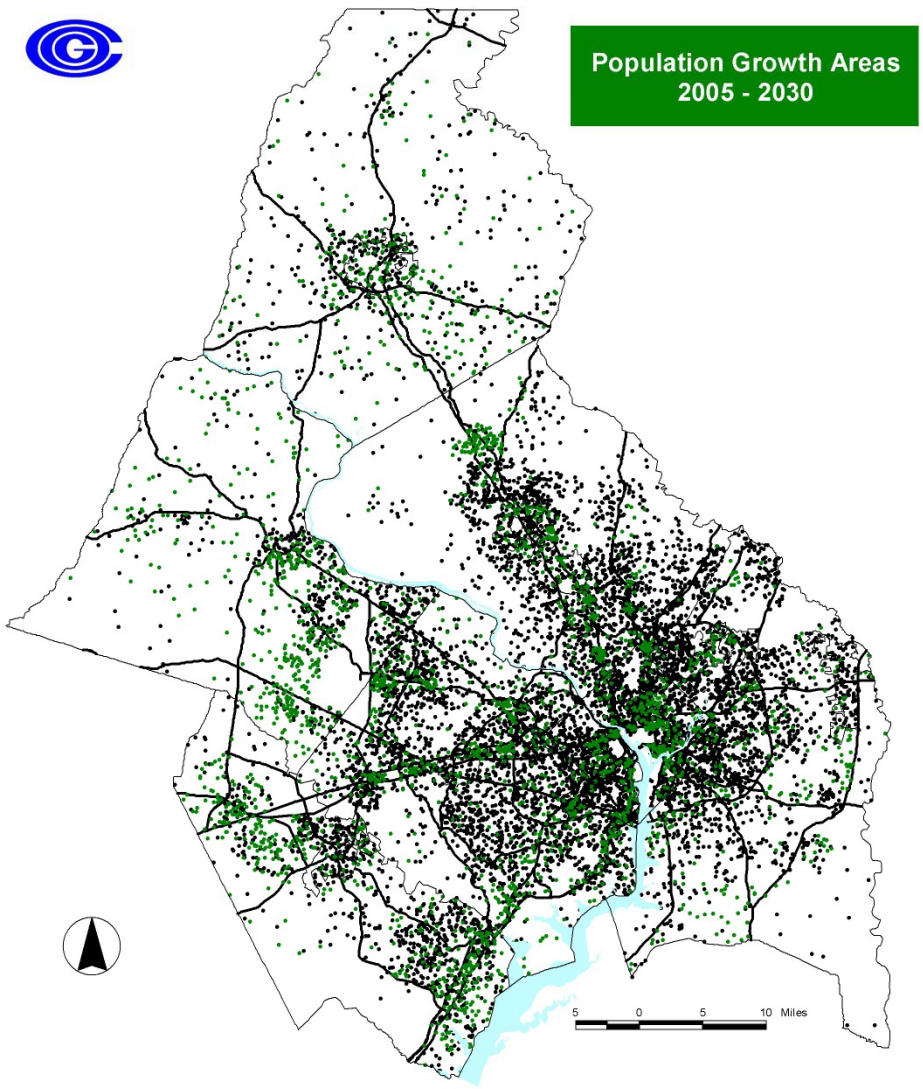
Cooperative Forecasting Process



Employment Growth Areas 2005 - 2030



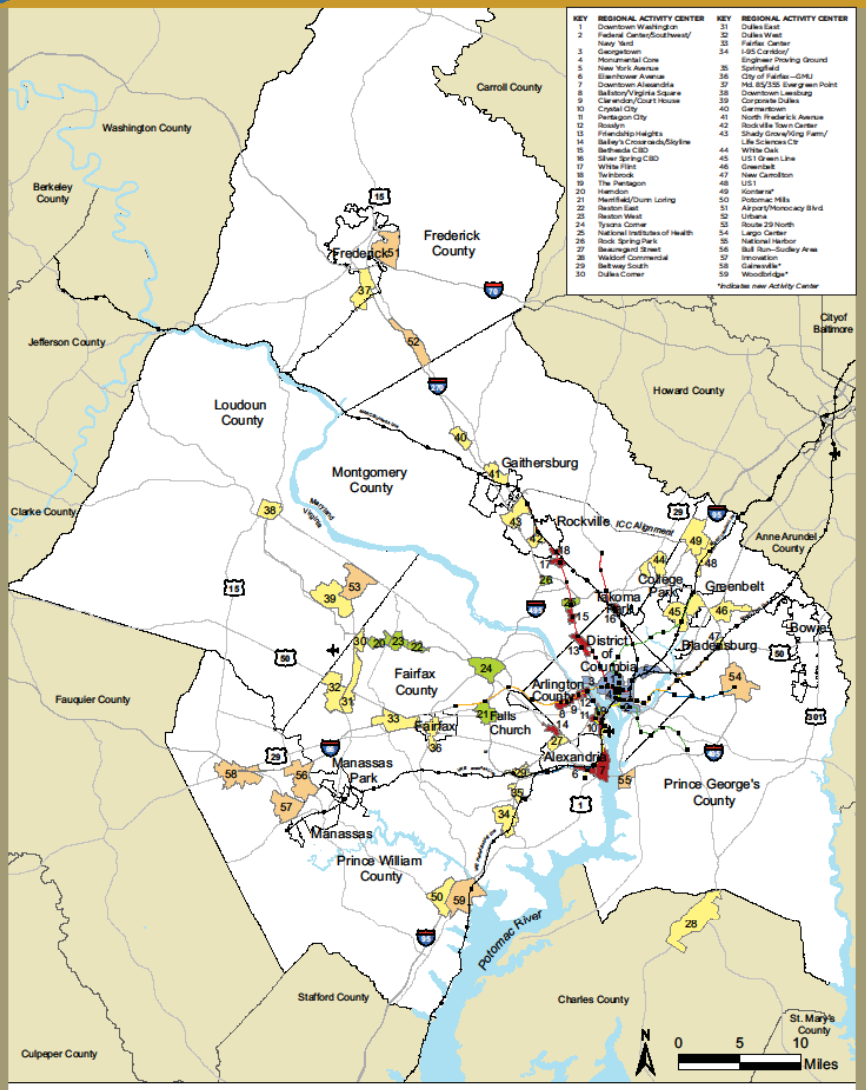
Note: One dot represents 500 jobs. Black dots indicate 2005 employment, green dots indicate 2005 to 2030 employment growth.
Source: Round 7.1 Cooperative Forecasts



Note: One dot represents 500 people. Black dots indicate 2005 population, green dots indicate 2005 to 2030 population growth.
Source: Round 7.1 Cooperative Forecasts

Map 1

Regional Activity Centers



LEGEND

Regional Activity Centers

- DC Core
- Mixed-Use Centers
- Employment Centers
- Suburban Employment Centers
- Emerging Employment Centers

- Metro Stations
- Metro Rail Lines
  - Blue
  - Green
  - Orange
  - Red
  - Yellow
- Commuter Rail Stations
- Commuter Rail Lines
- Airports
- Major Roads

Metropolitan Washington Council of Governments

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Round 8 Cooperative Forecasts Key Factors

- Short-Term Forecasts Given Economic Cycle
- Long-range employment forecasts by NAICS from Global Insight
- Employment / Household Relationship including in-commuting

Employment/Households

- Scenario 1 – Adjust Households and Population in Later Years, Not Enough Households to Supply Workers for Projected Jobs – Implies Significant In-Commuting. Household Growth Constrains Potential Job Growth ("Household-Constrained Scenario")
- Scenario 2 – Employment is the Driver, and More Households Needed to Provide the Workers for the Jobs ("Employment-Driven Scenario")

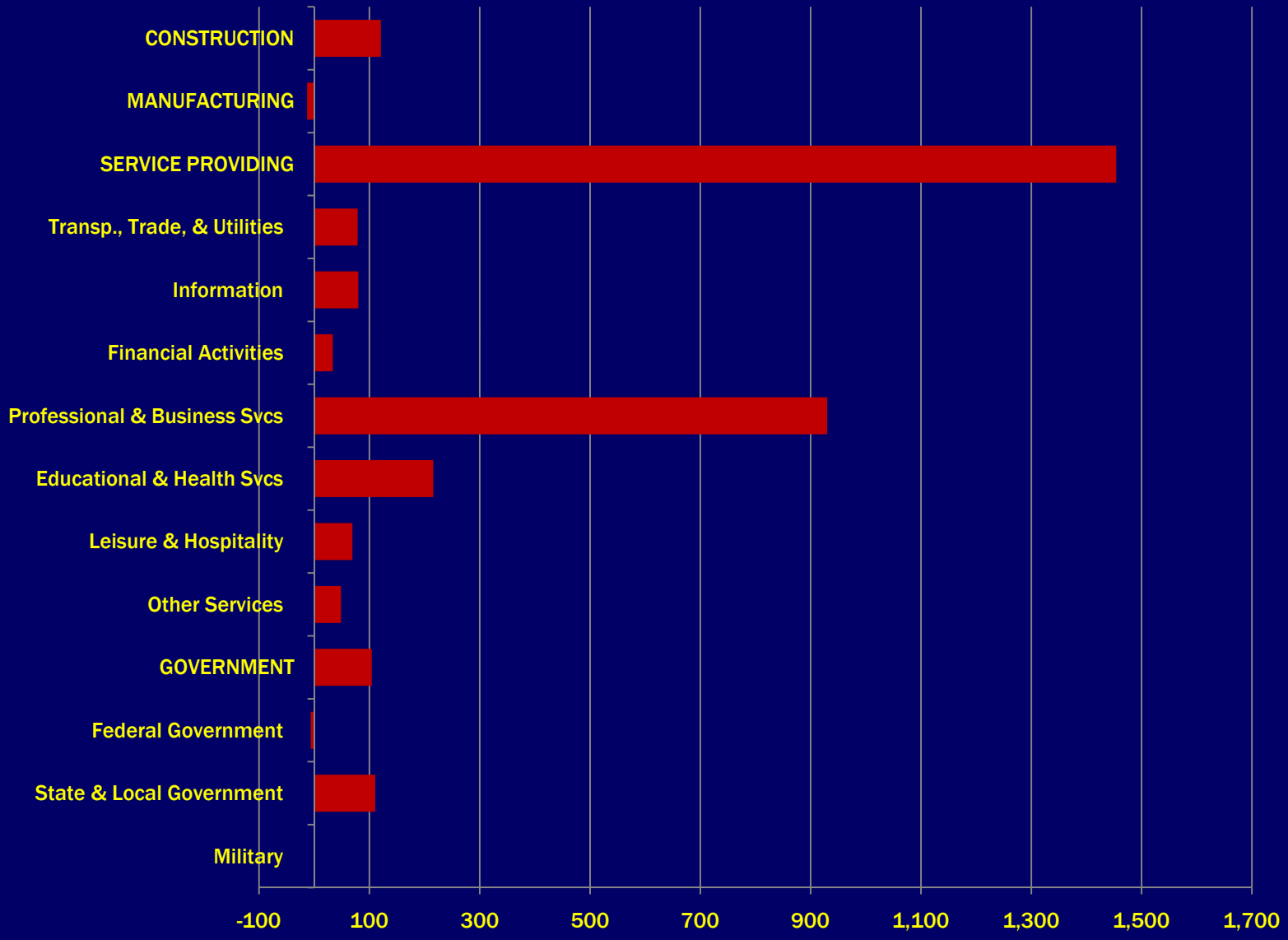
For both Scenarios, E/HH = 1.70 is Assumed In Adjusting the Forecasts

Round 8 Employment Growth by Sector

Source: GMU/CRA, Global Insight

EMPLOYMENT SECTOR	2005	2040	2005 to 2040 Growth		Share
TOTAL	**2,808.4**	**4,473.8**	**1,665.4**	**59%**	**100%**
CONSTRUCTION	**174.1**	**294.8**	**120.7**	**69%**	**7%**
MANUFACTURING	**59.4**	**46.4**	**(13.0)**	**-22%**	**-1%**
SERVICE PROVIDING	**1,960.8**	**3,414.8**	**1,454.0**	**74%**	**87%**
Transp., Trade, & Utilities	382.4	461.1	78.7	21%	5%
Information	98.3	178.2	79.9	81%	5%
Financial Activities	155.9	189.6	33.7	22%	2%
Professional & Business Svcs	636.9	1,566.9	930.0	146%	56%
Educational & Health Svcs	294.7	510.4	215.7	73%	13%
Leisure & Hospitality	231.2	300.5	69.2	30%	4%
Other Services	161.4	209.7	48.3	30%	3%
GOVERNMENT	**614.1**	**718.3**	**104.2**	**17%**	**6%**
Federal Government	339.1	332.8	(6.3)	-2%	0%
State & Local Government	274.9	385.5	110.6	40%	7%
Military	75.9	77.5	1.6	2%	0%

Forecast 2005 to 2040 Job Growth by Sector in Metropolitan Washington (Thousands of Jobs)



Key Findings

Employment (jobs) Comparison Throughout Forecast Period

TPB Modeled Area

Employment (In Thousands)

	2005	2010	2015	2020	2025	2030	2035	2040
Round 7.2A	3,785.5	4,079.7	4,406.1	4,740.0	5,024.9	5,272.3	5,465.8	5,656.7
Round 8.0	3,786.1	4,019.5	4,308.9	4,648.9	4,929.7	5,168.3	5,379.2	5,567.0
Change (#)	0.6	-60.3	-97.3	-91.3	-95.3	-104.0	-86.6	-89.8
Percent Change (%)	0.0%	-1.5%	-2.2%	-1.9%	-1.9%	-2.0%	-1.6%	-1.6%

Population Comparison Throughout Forecast Period

TPB Modeled Area

Persons (In Thousands)

	2005	2010	2015	2020	2025	2030	2035	2040
Round 7.2A	6,276.4	6,666.0	7,081.3	7,496.9	7,858.2	8,157.5	8,429.9	8,704.9
Round 8.0	**6,262.7**	**6,625.7**	**7,012.9**	**7,396.8**	**7,754.7**	**8,068.4**	**8,344.2**	**8,598.6**
Change (#)	-13.8	-40.1	-68.4	-100.1	-103.5	-89.1	-85.7	-106.3
Percent Change (%)	**-0.2%**	**-0.6%**	**-1.0%**	**-1.3%**	**-1.3%**	**-1.1%**	**-1.0%**	**-1.2%**

Household Comparison Throughout Forecast Period

TPB Modeled Area

Persons (In Thousands)

	2005	2010	2015	2020	2025	2030	2035	2040
Round 7.2A	2,340.3	2,520.4	2,714.3	2,895.9	3,049.5	3,182.9	3299.3	3,408.0
Round 8.0	2,334.6	2,491.3	2,672.7	2,842.3	3,000.1	3,136.9	3,256.1	3,362.8
Difference	-5.7	-29.1	-41.5	-53.6	-49.3	-46.0	-43.2	-45.2
Percent Change (%)	-0.2%	-1.2%	-1.5%	-1.9%	-1.6%	-1.4%	-1.3%	-1.3%

Comparison with Round 8.0 Econometric Benchmark Forecasts

1983 Washington MSA – Scenario #1–Household-Constrained

REVISED 10/15/09

(In Thousands)

	2005	2010	2015	2020	2025	2030	2035	2040
Total Jobs	3,145.4	3,231.7	3,442.2	3,656.1	3,846.1	4,045.3	4,236.0	4,428.3
Total Pop	4,927.2	5,141.1	5,400.0	5,691.3	5,985.6	6,280.2	6,564.8	6,849.5
Total HHS	1,845.9	1,917.8	2,024.8	2,150.6	2,262.4	2,379.6	2,491.8	2,604.9

	2005	2010	2015	2020	2025	2030	2035	2040
Total Jobs	-88.1 *-2.8%*	-10.0 *-0.3%*	4.2 *0.1%*	70.1 *1.9%*	106.8 *2.8%*	101.6 *2.5%*	86.1 *2.0%*	59.4 *1.3%*
Total Pop	23.8 *0.5%*	85.1 *1.7%*	127.9 *2.4%*	139.7 *2.5%*	128.3 *2.1%*	72.0 *1.1%*	-11.1 *-0.2%*	-112.4 *-1.6%*
Total HHS	13.2 *0.7%*	52.7 *2.7%*	81.2 *4.0%*	86.8 *4.0%*	96.9 *4.3%*	84.3 *3.5%*	59.5 *2.4%*	25.5 *1.0%*

Projected Jobs/Households Ratios Throughout Forecast Period

1983 Washington MSA and TPB Modeled Area

	2005	2010	2015	2020	2025	2030	2035	2040
1983 Washington MSA Region	1.64	1.63	1.64	1.67	1.68	1.68	1.69	1.71
TPB Modeled Area	1.62	1.62	1.61	1.64	1.64	1.65	1.65	1.66

Round 8.0 approval timeline

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

PDTAC approves the jurisdictional control totals and recommends transmission to the Metropolitan Development Policy Committee for approval in the forthcoming air quality conformity analysis.

The Cooperative Forecasting and Data Subcommittee are briefed on Round 8.0 Cooperative Forecasts.

The Planning Directors Technical Advisory Committee (PDTAC) are briefed on the Round 8.0 Econometric Benchmark Forecasts and selected Scenario 1 – Household-Constrained Model as the preferred scenario.

Next Steps . . .

- COG staff will receive TAZ-level forecasts (October – Mid-January 2010) from jurisdictions
- MDPC approves Round 8.0 forecast control totals for testing in FY2010 Air Quality Conformity Analysis
- TAZ-level Round 8.0 data provided to TPB staff for Air Quality Conformity Analysis (End of January – Beginning of February)
- Final COG Board approval of 8.0 made concurrently with TPB approval of Air Quality Conformity Assessment for the 2010 CLRP and FY2011-2016 TIP in July 2010.

Questions . . .