ROUND 10.1 COOPERATIVE FORECASTS OF EMPLOYMENT, POPULATION, AND HOUSEHOLDS

Greg Goodwin
Regional Planner, COG Department of Community Planning and Services

TPB Technical Committee
November 7, 2025

Metropolitan Washington
Council of Governments

Cooperative Forecasting Program

- Established by COG in 1975, enables local, regional, and federal agencies to coordinate planning decisions using common assumptions about future growth.
- Each series or “Round” provides forecasts of employment, population, and households by five-year increment for a period of 20 to 30 years.
- Official land use inputs for planning by the Transportation Planning Board (TPB), Metropolitan Washington Air Quality Committee (MWAQC), Climate Energy Environment Policy Committee (CEEPC), and others.

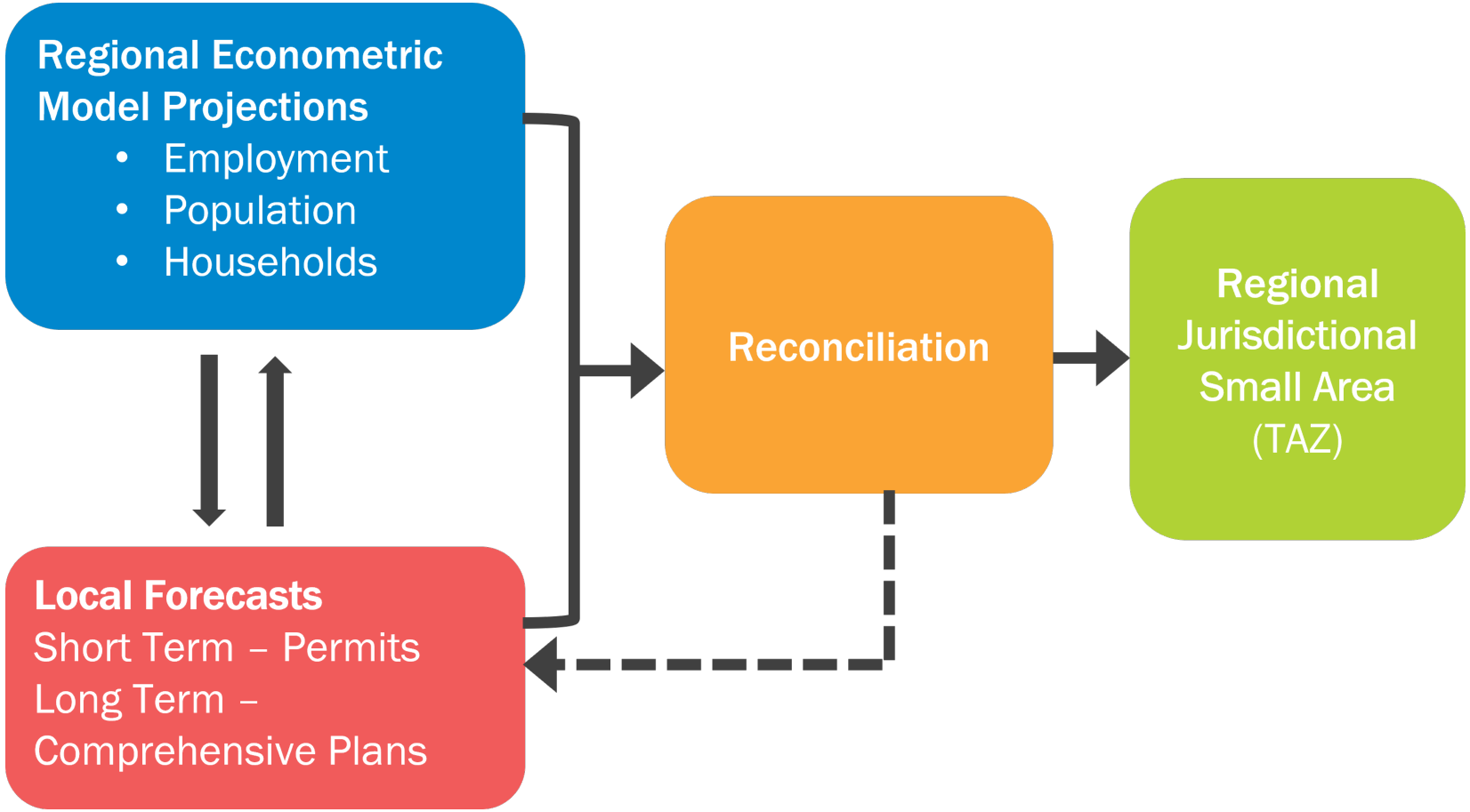
Prior Rounds of Cooperative Forecasts

Round 1 – 1976
Round 2 – 1979
Round 3 – 1983
Round 3.5 – 1985
Round IV – 1987
Round IV-1 – 1991
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 9.1a – 2019
Round 9.2 – 2021

Round 10.0 – 2023
Round 10.1 – 2025

COG Cooperative Forecasting Process



Round 10.1 Update to the Cooperative Forecasts

The Cooperative Forecasting program provides an opportunity – but not a requirement for jurisdictions to update their Forecasts …

Key factors or actions that may warrant a local update include:

- Updates to a small-area or comprehensive plan
- Notable commercial or residential rezonings
- Changes to the amount, location, or market timing of local residential and commercial permits and construction
- Changes to local labor and employment markets

Jurisdictions Submitting Changes for Round 10.1

Jurisdiction	Employment	Population	Households
Montgomery County		✓	✓
City of Rockville		✓	✓
Prince George's County	✓	✓	✓
City of Alexandria	✓	✓	✓
Arlington County	✓	✓	✓
Fairfax County		✓	✓
Loudoun County	✓	✓	✓
Prince William County	✓	✓	✓

Key Takeaway:

- Only eight jurisdictions submitted changes to the Round 10.0 Cooperative Forecasts

Summary of Round 10.1 Cooperative Forecasts

COG Region
(Millions)

	2020	2025	2030	2035	2040	2045	2050	Absolute Change	% Change
Employment	3.1	3.3	3.5	3.7	3.8	4.0	4.1	1.0	31.3
Population	5.7	5.9	6.2	6.4	6.7	6.9	7.1	1.4	25.1
Households	2.1	2.2	2.3	2.5	2.6	2.7	2.8	0.7	32.2

Key Takeaways:

- Approximately 1.0 million more jobs in 2050
- Approximately 1.4 million more people in 2050
- About 700,000 more households in 2050

Absolute Change in Forecasts from 10.0 Forecasts

COG Region
(Thousands)

	2020	2025	2030	2035	2040	2045	2050
Employment	0.1	-0.5	17.7	9.3	11.3	9.1	3.3
Population	-3.5	-19.3	-22.0	-18.2	-21.0	-17.6	-13.2
Households	-0.1	-9.1	-6.0	-3.1	-1.5	3.6	8.1

Key Takeaways:

- 18,000 more jobs (2030) compared to Round 10.0
- 22,000 fewer people (2030) compared to Round 10.0
- 10,000 fewer households (2025) compared to Round 10.0

Percentage Change in Forecasts from 10.0 Forecasts

COG Region

	2020	2025	2030	2035	2040	2045	2050
Employment	0.0%	0.0%	0.5%	0.2%	0.3%	0.2%	0.1%
Population	-0.1%	-0.3%	-0.4%	-0.3%	-0.3%	-0.3%	-0.2%
Households	0.0%	-0.4%	-0.3%	-0.1%	-0.1%	0.1%	0.3%

Key Takeaways:

- Less than one percent difference in employment compared to Round 10.0
- Less than one percent difference in population compared to Round 10.0
- Less than one percent difference in households compared to Round 10.00

Comparison of Forecast Growth 2020 to 2050: Round 10.1 and Round 10.0

COG Region
(Thousands)

	Round 10.1	Round 10.0
Employment	990.6	987.4
Population	1,440.1	1,449.8
Households	684.5	676.3

Key Takeaways:

- 3,200 more jobs forecasted in Round 10.1 compared to Round 10.0
- 9,700 fewer people forecasted in Round 10.1 compared to Round 10.0
- 8,200 more households forecasted in Round 10.1 compared to Round 10.0

Trends in the Local Forecasts

- The District of Columbia contains the greatest number of jobs in 2020 (785,900) and anticipates the greatest increase in jobs between 2020 and 2050 (+235,700).
- Fairfax County contains the greatest number of people in 2020 (1.2 million), while Prince George's County would see the greatest increase in population between 2020 and 2050 (+251,700).
- Fairfax County contains the greatest number of households in 2020 (417,500), while the District of Columbia would see the greatest increase in households between 2020 and 2050 (+129,000).

Trends in the Local Forecasts, Continued

- The Inner Suburbs would see the largest growth adding 441,400 jobs, 672,700 people, and 283,200 households.
- The Outer Suburbs would see the greatest *rate* of growth in employment (+47.4%) and population (+33.3%); the Central Jurisdictions would see the greatest household growth rate (+45.6%).
- Northern Virginia would see the largest growth in employment (+434,200) and households (+287,000).

Next Steps

- Round 10.1 Growth Trends Report will be released in late fall.
  - Cooperative Forecasting Process
  - Round 10.1 Summary Tables (Employment, Population, and Households)
  - Jurisdictional Comparisons (Absolute and Percentage Change)
  - Maps providing insight on existing and future growth (Employment, Population and Households).
  - Calculations of Round 10.1 Cooperative Forecasts inside and outside of Regional Activity Centers
- Round 10.1 data transmitted to COG Transportation Planning staff for use in future transportation planning activities and analysis.
- Round 10.1 data will be posted on the COG website at the following link: Cooperative Forecasts: Employment, Population, and Households Forecasts by Transportation Analysis Zone

Greg Goodwin

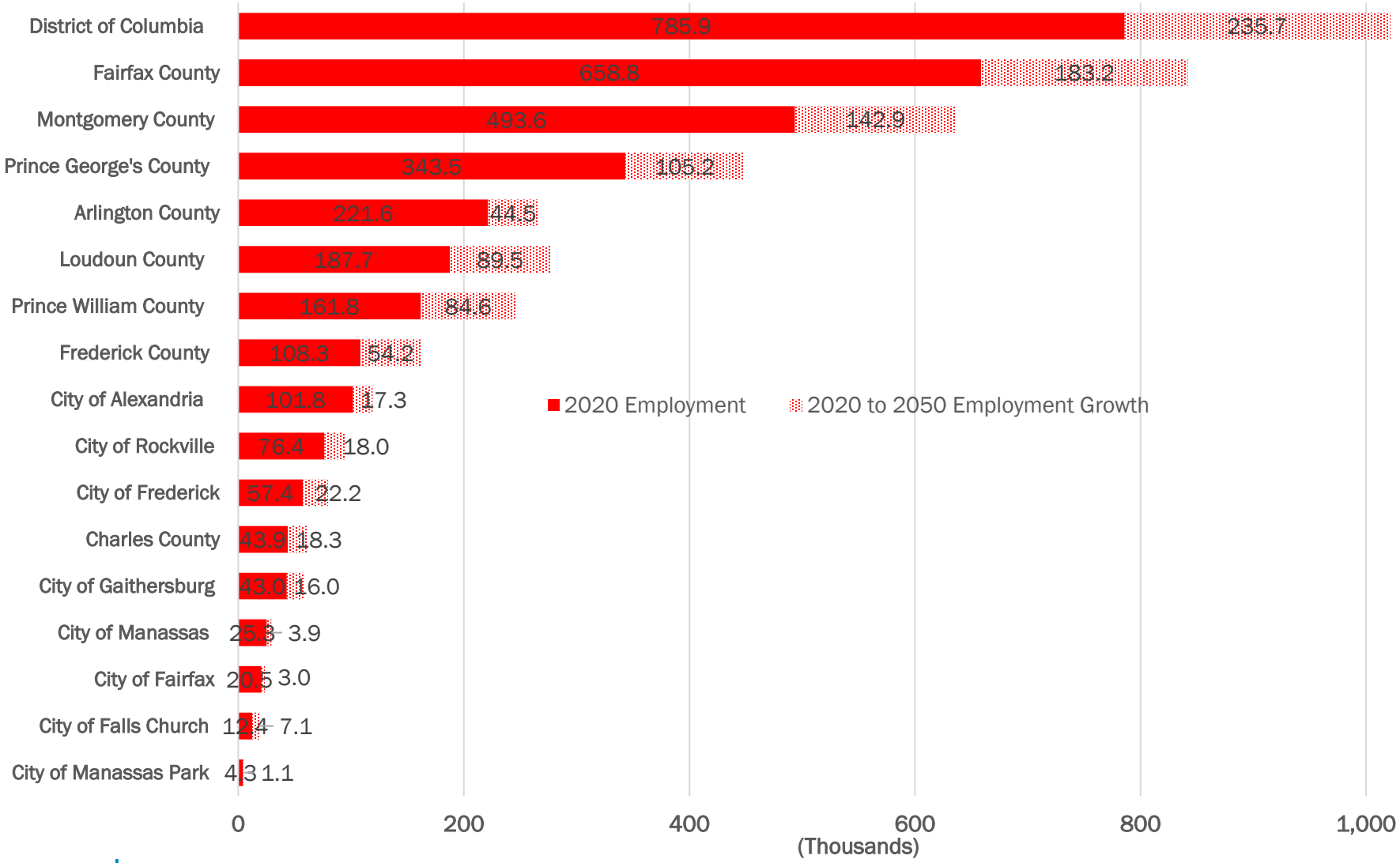
ggoodwin@mwcog.org

mwcog.org

777 North Capitol Street NE, Suite 300
Washington, DC 20002

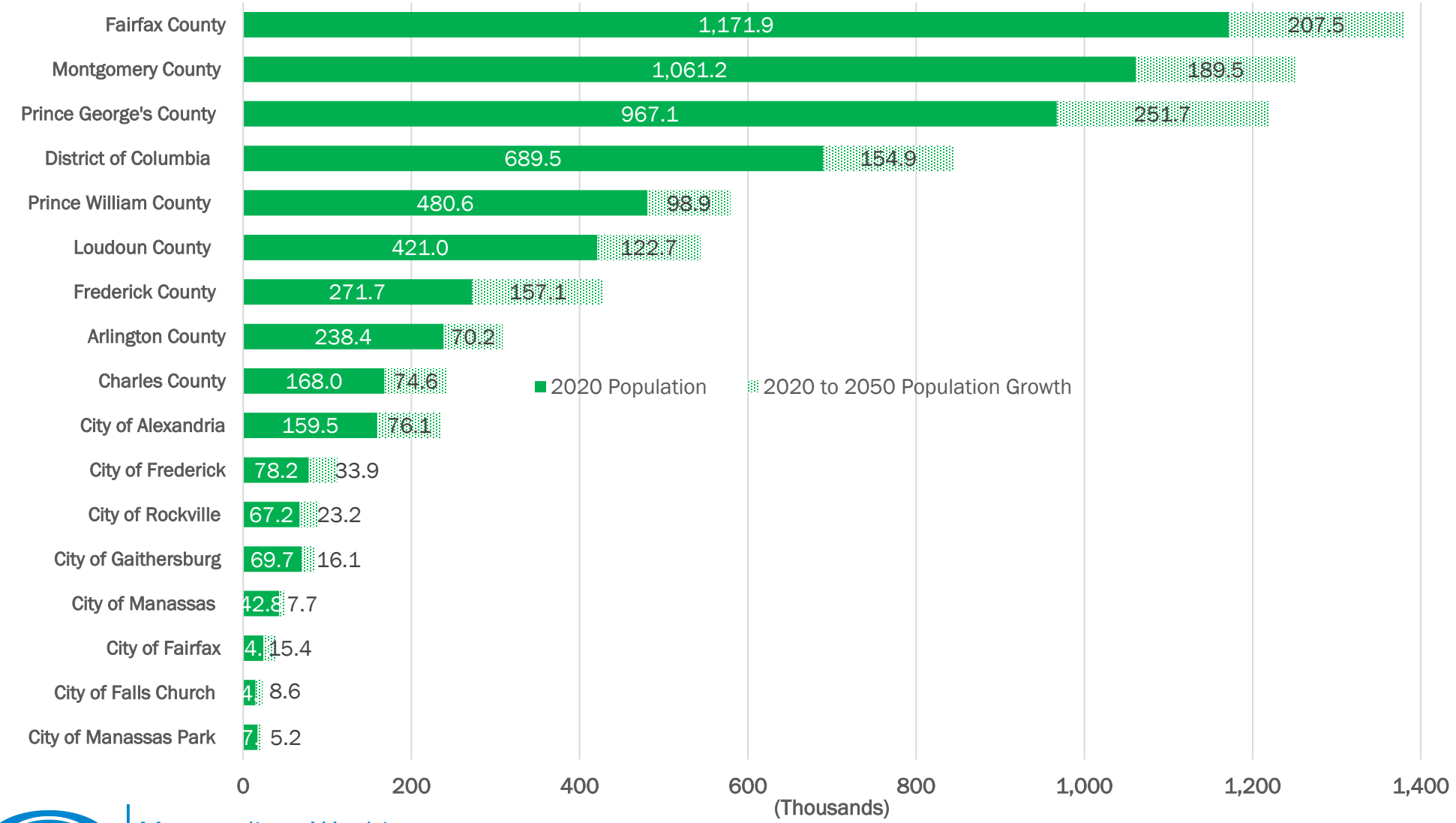
Metropolitan Washington
Council of Governments

Round 10.1 Employment Forecasts by Jurisdiction (2020 to 2050)



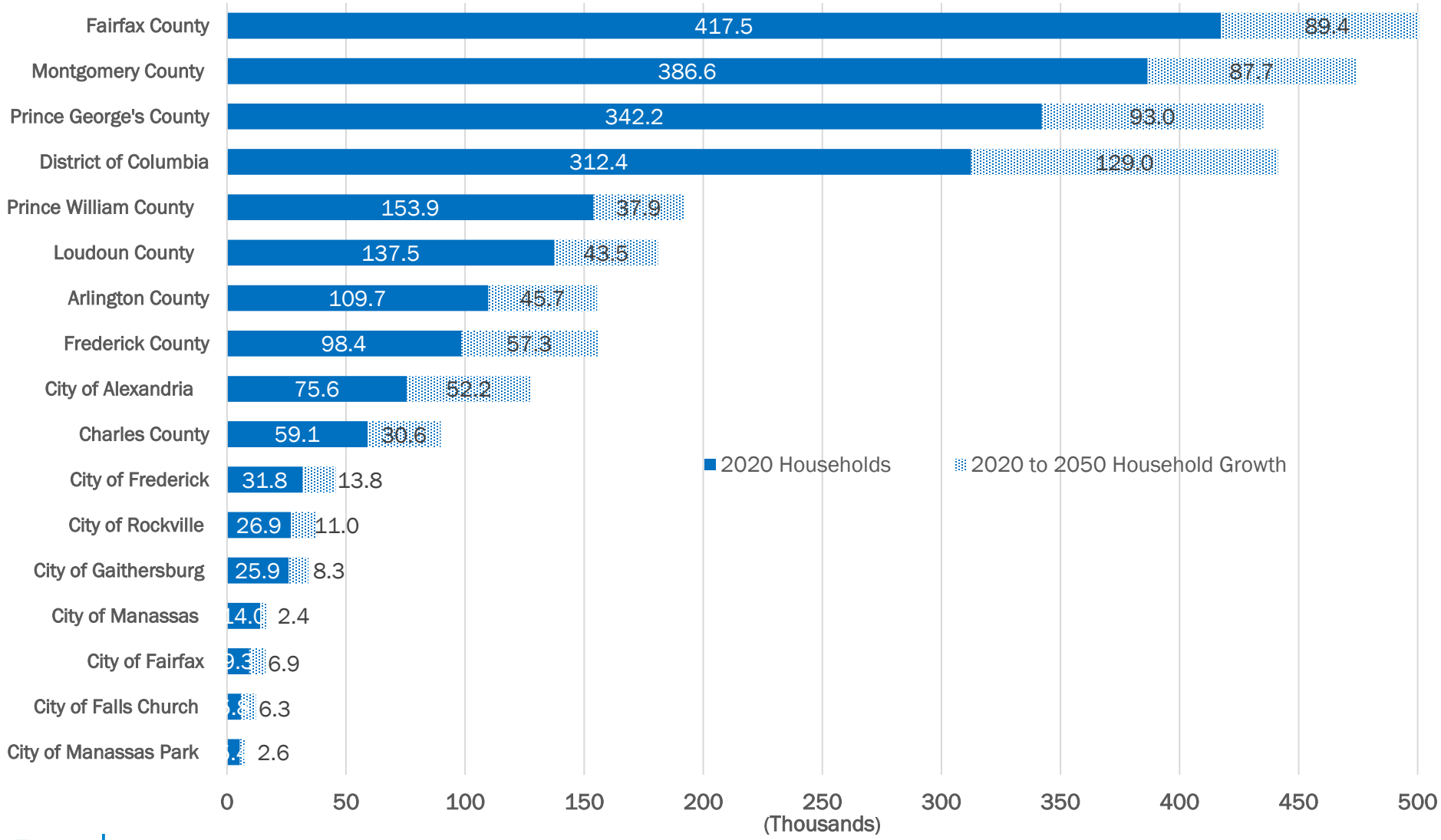
Metropolitan Washington Council of Governments

Round 10.1 Population Forecasts by Jurisdiction (2020 to 2050)



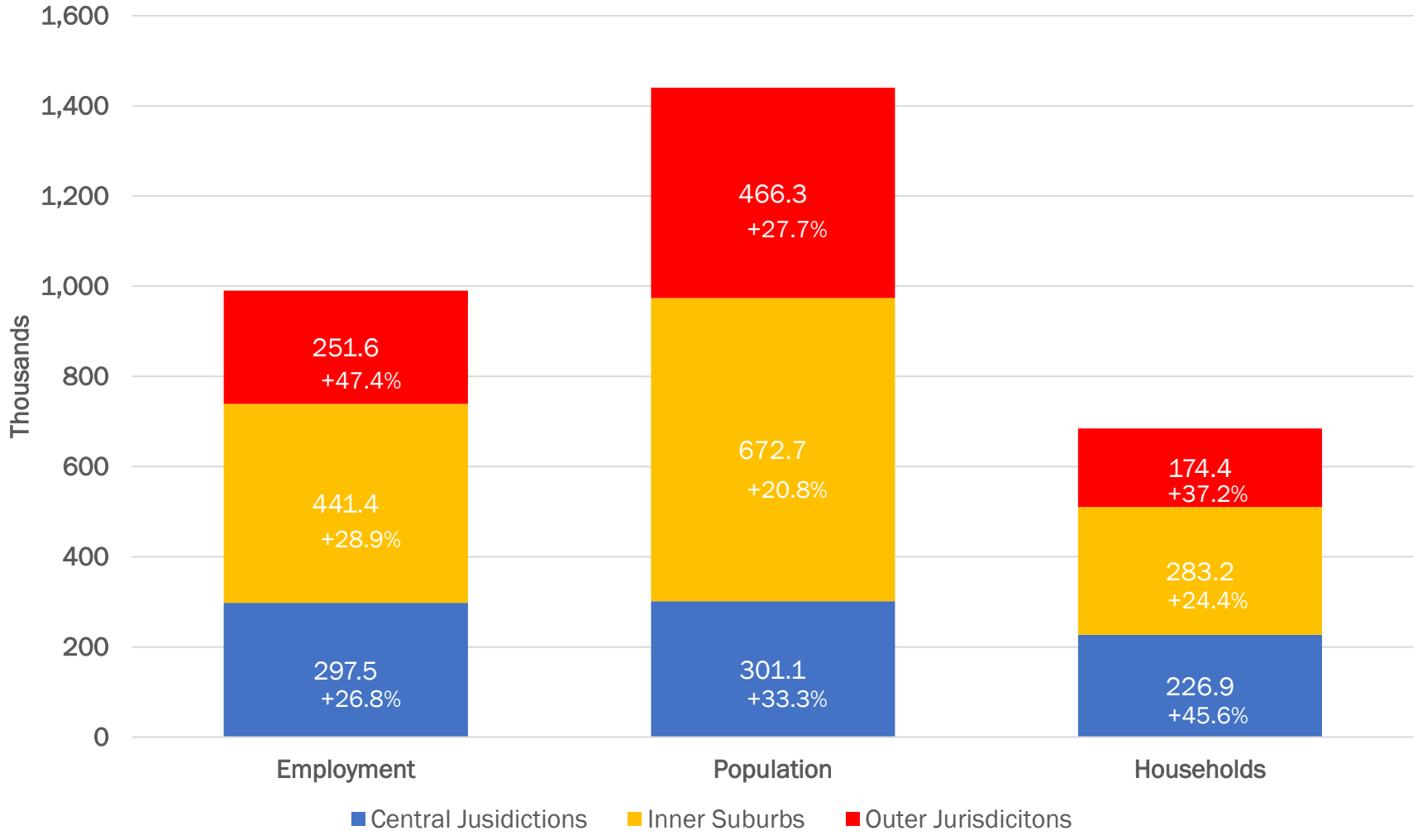
Metropolitan Washington Council of Governments

Round 10.1 Household Forecasts by Jurisdiction (2020 to 2050)



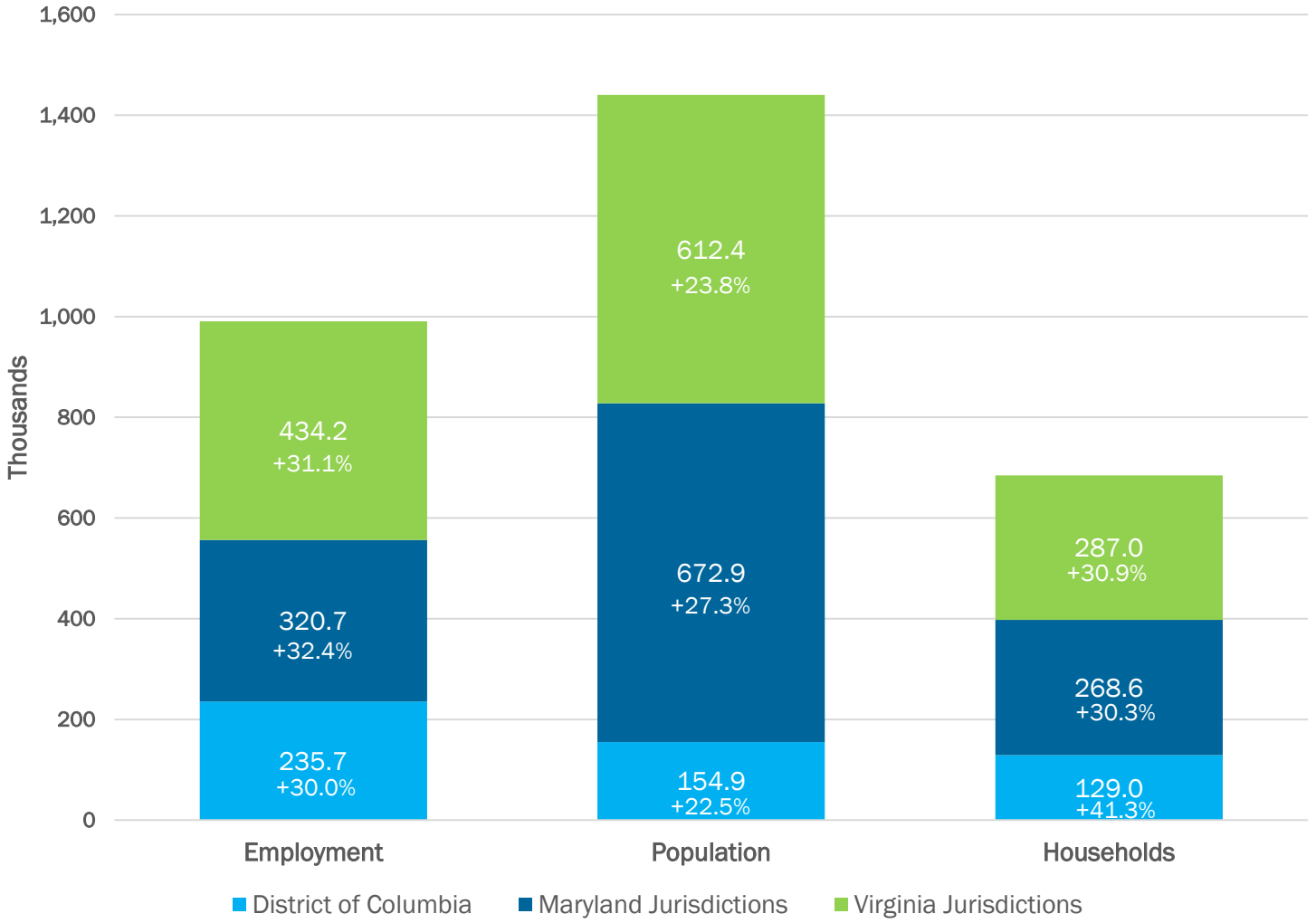
Metropolitan Washington Council of Governments

Round 10.1 Forecasts - Growth by Regional Group (2020 to 2050)



Metropolitan Washington
Council of Governments

Round 10.1 Forecasts - Growth by Substate Region (2020 to 2050)

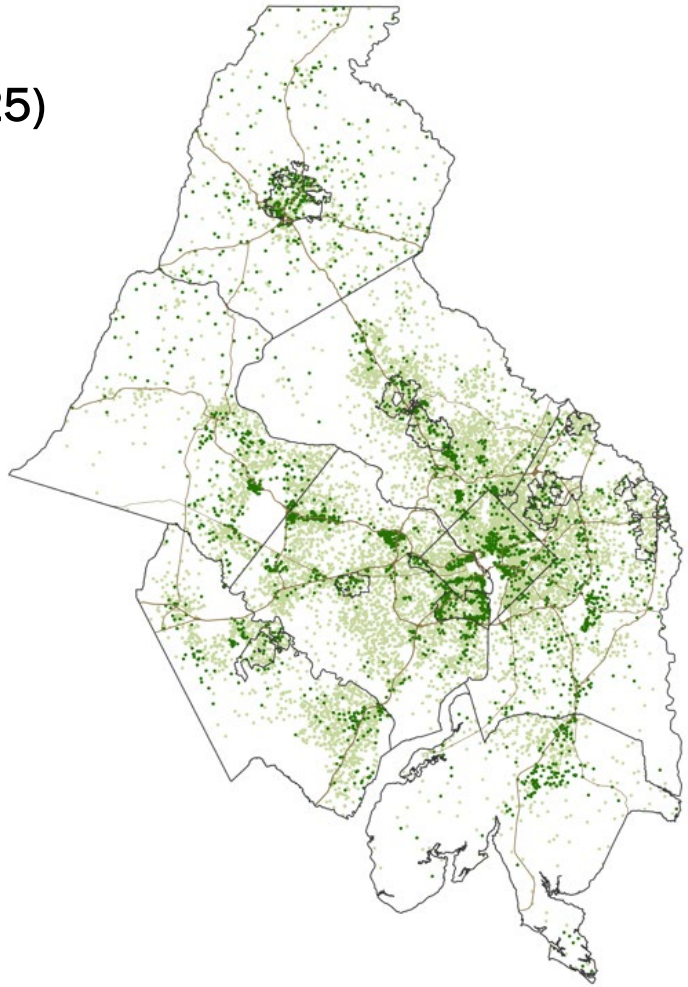


Metropolitan Washington Council of Governments

Round 10.0 Forecasts – 2020 Population and Projected Population to 2050

Map will be updated with Round 10.1 data (late fall of 2025)

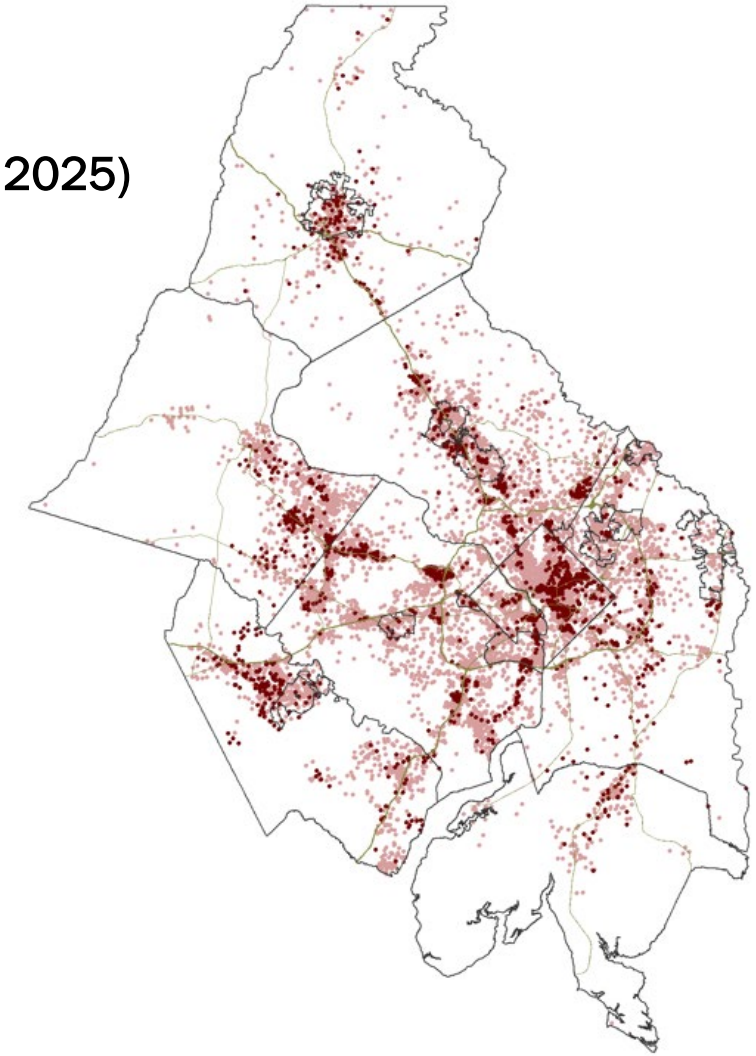
Note: One dot represents 500 people. Light green dots indicate 2020 population, dark green dots indicate 2020 to 2050 population growth



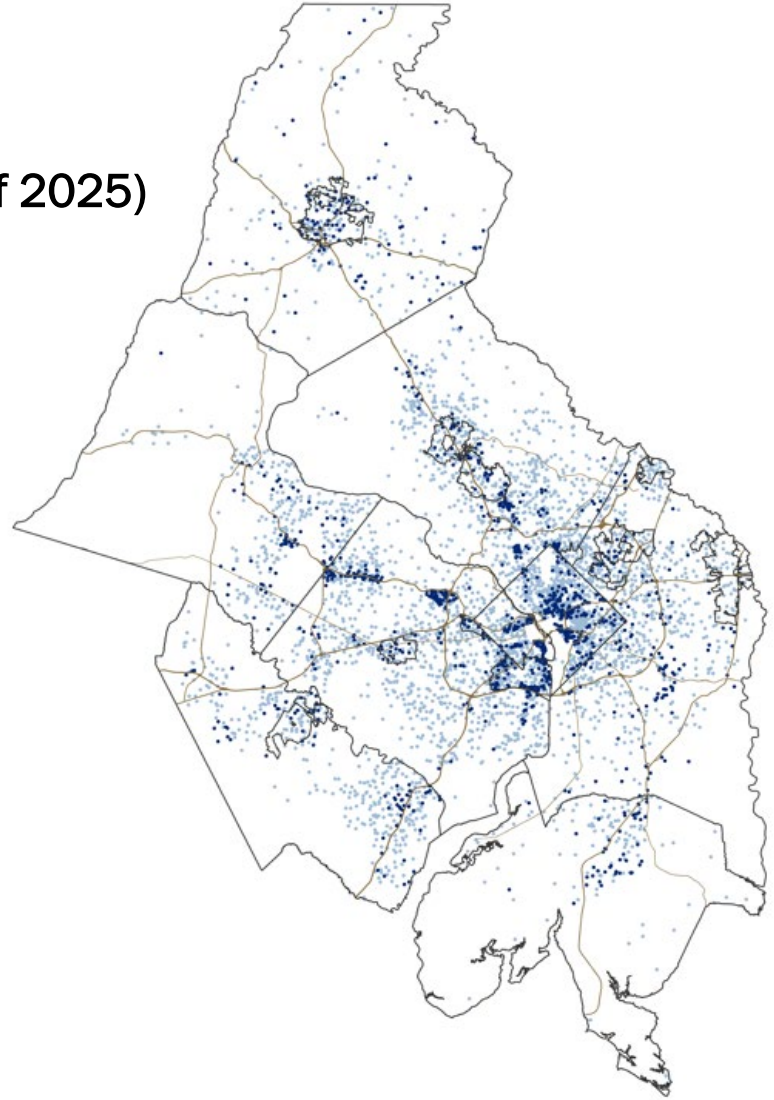
Round 10.0 Forecasts – 2020 Employment and Projected Employment to 2050

Map will be updated with Round 10.1 data (late fall of 2025)

Note: One dot represents 500 jobs. Light red dots indicate 2020 employment, dark red dots indicate 2020 to 2050 employment growth



Round 10.0 Forecasts – 2020 Households and Projected Households to 2050

Map will be updated with Round 10.1 data (late fall of 2025)

Note: One dot represents 500 households. Light blue dots indicate 2020 households, dark blue dots indicate 2020 to 2050 household growth