ROUND 10.1 GROWTH TRENDS TO 2050

Cooperative Forecasting in Metropolitan Washington

December 2025

Metropolitan Washington
Council of Governments

ROUND 10.1 GROWTH TRENDS TO 2050:
COOPERATIVE FORECASTING IN METROPOLITAN WASHINGTON
Prepared by the Cooperative Forecasting and Data Subcommittee on behalf of the Planning Directors Technical Advisory Committee

ABOUT COG

The Metropolitan Washington Council of Governments (COG) is an independent, nonprofit association that brings area leaders together to address major regional issues in the District of Columbia, suburban Maryland, and Northern Virginia. COG's membership is comprised of 300 elected officials from 24 local governments, the Maryland and Virginia state legislatures, and U.S. Congress.

CREDITS

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TABLE OF CONTENTS

MAPS, FIGURES, AND TABLES

INTRODUCTION

Local governments in metropolitan Washington have worked cooperatively for many years to develop region-wide and neighborhood level forecasts of employment, population, and households. The very first round of Cooperative Forecasts – Round 1 – was adopted by the Metropolitan Washington Council of Governments (COG) Board in 1976. Through this effort, a consistent set of local and regional forecasts is developed for use in program and facilities planning throughout the region.

The Cooperative Forecasting Program, established in 1975 and administered by COG, enables local, regional, and federal agencies to coordinate planning decisions using common assumptions about future growth and development in the region. Each series of forecasts, or a "round," provides land use activity forecasts of employment, population, and households by five-year increments. Each round covers a period of 20 to 30 years.

The Cooperative Forecasting process provides data necessary for regional planning activities including analyzing the effects of growth and developing policy responses to regional issues. In addition, the forecasts are used to determine the demand for public facilities including schools, parks, medical facilities, roads, stores, and services.

Map of COG Member Governments
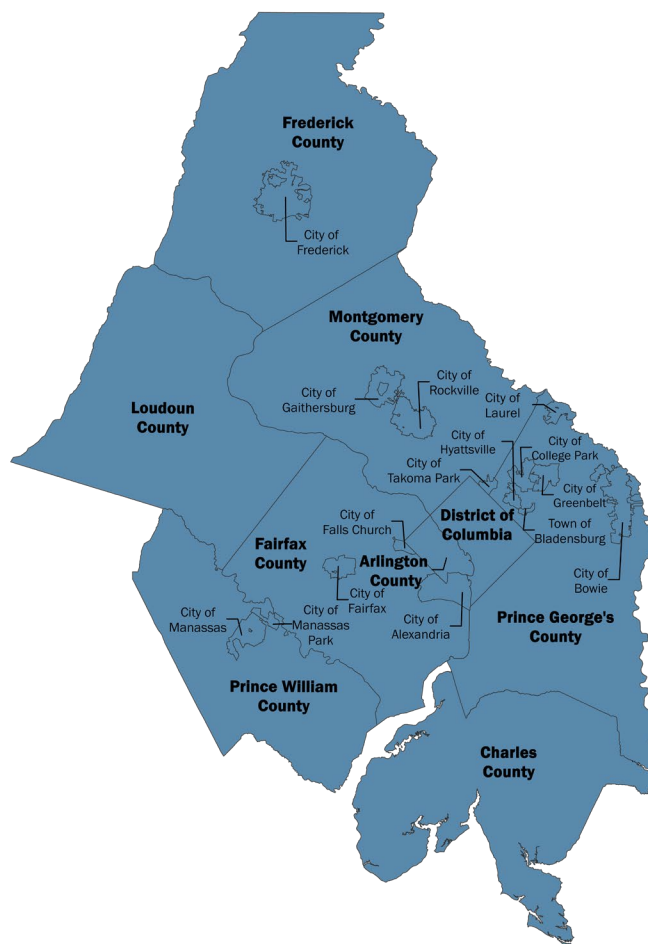
According to the Round 10.1 Cooperative Forecasts, between 2020 and 2050, the region will add more than:

1.4 million people
990,600 jobs
684,500 households

PROCESS

The Cooperative Forecast is a multi-stage, "top-down/bottom-up" process undertaken by COG's Planning Directors Technical Advisory Committee (PDTAC) and the Cooperative Forecasting and Data Subcommittee. It employs a regional econometric model and local jurisdictional forecasts. The model projects employment, population, and households for the metropolitan Washington region based on national economic trends and local demographic factors.

The Regional Econometric Model is based on the COG / Transportation Planning Board (TPB) Planning Area geography. Concurrently, local jurisdictions develop independent projections of population, households, and employment based on pipeline development, market conditions, planned transportation improvements, and adopted land use plans and zoning, taking into account the preliminary regional projections.

Figure 1: Cooperative Forecasting Process
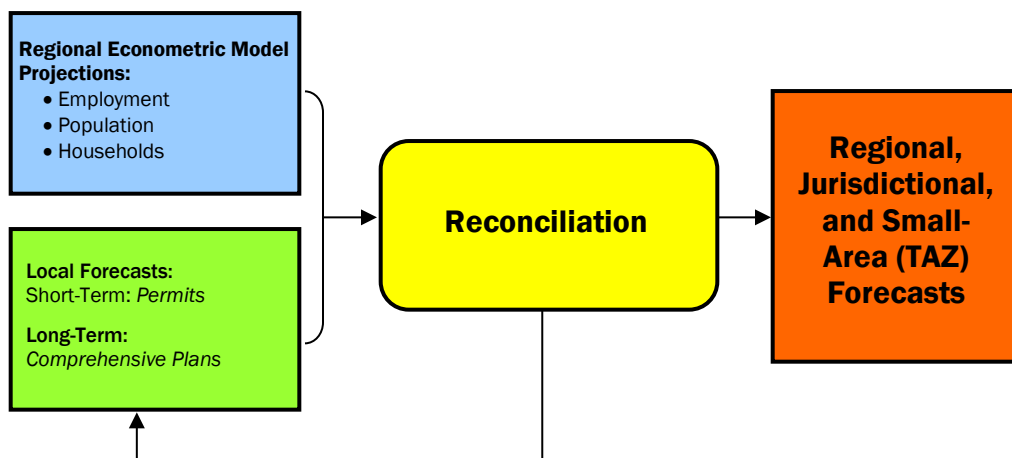
The Cooperative Forecasting and Data Subcommittee, which is comprised of local government planners, economists, and demographers, review and reconcile the two sets of projections. For major rounds, model and local jurisdictional projections are typically within three percent of each other for the new set of Cooperative Forecasts to be reconciled.

The forecasts were presented to and approved by the COG PDTAC (Round 10.1 – July 2025) and the COG Board of Directors (Round 10.1 – October 2025).

Recognizing that market conditions and policies may change, the subcommittee reviews the forecasts annually and allows local governments to make minor adjustments. The forecasts may also be adjusted to reflect local governments' assessment of the likely housing and employment impact due to major new transportation facilities. Updated forecasts are referred to as Round 9.1, Round 9.2, etc.

Table 1: Cooperative Forecast Rounds, 1976 - 2025

Round 1 - 1976	Round 6a – 1998	Round 8.0 – 2010
Round 2 - 1979	Round 6.1 – 1999	Round 8.0a – 2011
Round 3 - 1983	Round 6.2 – 2000	Round 8.1 – 2012
Round 3.5 – 1985	Round 6.3 – 2003	Round 8.2 – 2013
Round 4 – 1987	Round 6.4A – 2004	Round 8.3 – 2014
Round 4-1 – 1991	Round 7.0 – 2005	Round 8.4 – 2015
Round 5 – January 1994	Round 7.0a – 2006	Round 9.0 - 2016
Round 5.1 – May 1994	Round 7.1 – 2008	Round 9.1 - 2018
Round 5.2 - 1995	Round 7.2 – July 2009	Round 9.1a - 2020
Round 5.3 – 1996	Round 7.2A – October 2009	Round 9.2 - 2021
Round 5.4 – 1997		Round 10.0 - 2023
		Round 10.1 - 2025

Important Notes

In reviewing the Round 7.0 forecasts in 2005, the PDTAC and the Metropolitan Development Policy Committee (MDPC) determined that local plans and zoning in the metropolitan Washington region do not currently provide the housing necessary for workers to fill the forecasted jobs. Previously, forecasts adopted by the COG Board were based on local plans and zoning capacities as provided for in adopted land use plans. In approving Round 7.0, the COG Board concluded that certain localities would need to re-plan and re-zone land to provide sufficient housing to meet employment projections.

For the Round 8.0 Cooperative Forecasts, COG partnered with the George Mason University Center for Regional Analysis (CRA) for the development of new regional benchmark totals. With the guidance of COG staff and the CRA, the regional benchmark totals were developed using the econometric modeling forecasts from Global Insight, Inc. for the metropolitan Washington region. The PDTAC was briefed on the development of the benchmark totals methodology and gave their final approval of the benchmark totals at the June 2009 committee meeting.

Results of the Round 8.2 Cooperative Forecasts started to show a divergence from the Round 8.0 regional benchmark totals and starting in 2013, the Cooperative Forecasting and Data Subcommittee began the work to re-examine the economic outlook of the region. A data product from Global Insight, Inc. (IHS Connect) was examined in anticipation of developing a new regional benchmark total.

For Round 10.0, 2020 was the base year for the employment, population, and households forecast series, again indexed to S&P Global projections for the region. Jurisdictional submissions were provided to COG staff during the September through December 2022 timeframe with TAZ level submissions in December 2022 through May 2023. The initial Census results, the Decennial Census P.L. 94-171 Redistricting Data, were released in August 2021 and are therefore included in Round 10.0 Cooperative Forecasts as part of the development of the 2020 base year.

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

Table 2: 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	✓	✓	✓

For the Round 10.1 Cooperative Forecasts, eight jurisdictions submitted changes to the Round 10.0 Cooperative Forecasts.

The change (Employment, Population, and Households) between Round 10.1 and Round 10.0 is "minimal". The key takeaway approximately 1.0 million more jobs in 2050 (compared to 2020), approximately 1.4 million more people in 2050, and about 700,000 more households in 2050. At the regional level, the difference with Round 10.0 is again "minimal" – 3,200 more jobs forecasted in Round 10.1 compared to Round 10.0, 9,700 fewer people forecasted in Round 10.1, and 8,200 more households forecasted in Round 10.1 compared to Round 10.0.

ECONOMETRIC MODEL

The Round 10.0 Econometric Model is a regional set of employment, population, and households forecasts developed by S&P Global (IHS Connect) and was released in July 2022. Each state is modeled individually and linked to the nation. Net migration (population and household growth) is driven by economic conditions; people will follow jobs. The wage & salary job forecasts are developed by employment sector (for each of the 5-yr. Intervals) for the COG region. The population forecasts are provided by age cohort for the COG region as well. These "benchmark' forecasts to 2050 are the regional growth to which COG member forecasts are reconciled.

Employment

The Round 10.0 Econometric Model projections reveal significant decreases in future employment through 2050 as compared to the Round 9.0 Econometric Model.

Employment in the region will reach 3.7 million jobs by 2050. The region will add about 761,700 Wage & Salary jobs or a 24 percent increase to an existing 2020 base of 3.2 million jobs. When you add Self-Employment and Military (Active Duty) the COG region has an additional 221,000 jobs, the region will have approximately 3.9 million jobs in 2050.

Figure 2: Historic and Forecast Wage & Salary Employment, 1990 to 2050
(Self-Employed and Military Employment not included)
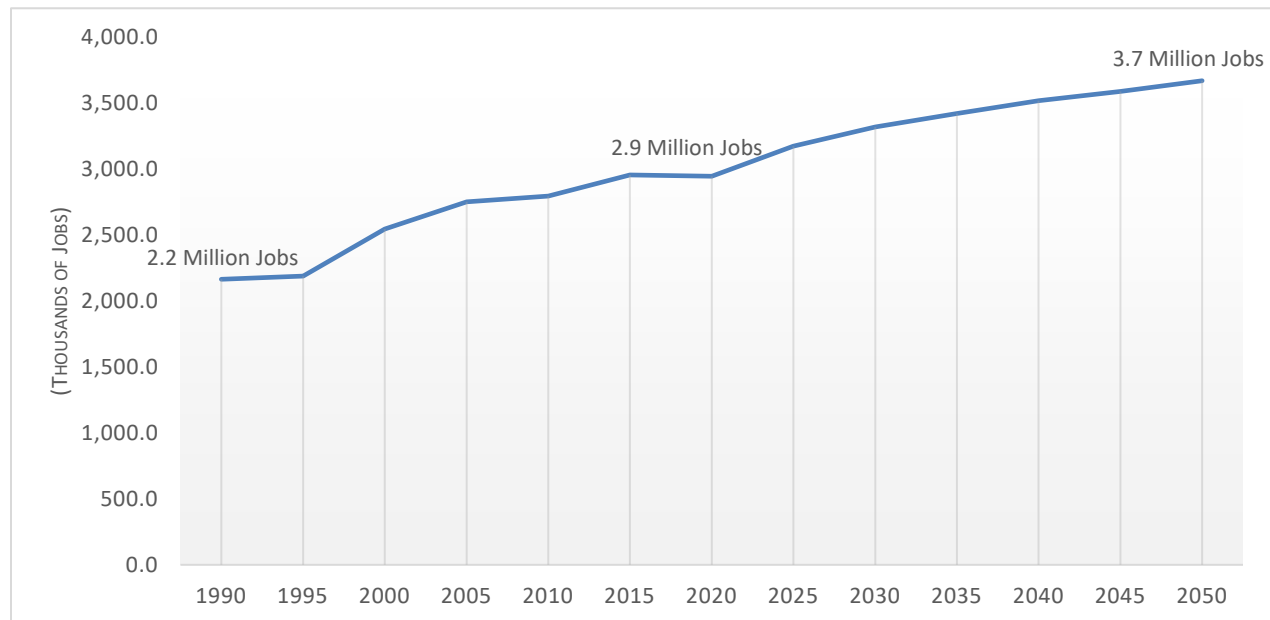
Table 3: Round 10.0 Econometric Model Results – Employment (Thousands)

	2020	2025	2030	2035	2040	2045	2050
Construction, Natural Resources, and Mining	147.2	151.7	153.9	159.7	175.7	192.3	211.7
Manufacturing	47.6	48.9	48.2	47.3	47.5	47.3	47.4
Transportation, Trade, and Utilities	343.0	337.2	330.6	336.0	340.8	342.9	346.7
Information	73.2	81.0	83.1	82.0	85.2	84.4	84.1
Financial Activities	143.8	149.7	145.6	148.7	151.4	152.8	153.8
Professional and Business Services	743.0	760.1	849.1	901.5	948.7	972.1	995.0
Educational and Health Services	391.0	423.9	449.8	475.8	482.6	489.3	497.5
Leisure and Hospitality	216.2	342.8	351.1	344.9	339.4	349.9	361.8
Other Services	183.2	199.2	217.5	227.1	236.0	243.3	247.6
Government	659.0	681.8	693.3	701.5	712.9	716.9	727.0
Federal Government	361.8	366.2	367.0	363.0	365.8	361.8	364.8
State and Local Government	297.1	315.7	326.3	338.6	347.1	355.1	362.2
Total Nonfarm	**2,947.2**	**3,176.3**	**3,322.1**	**3,424.4**	**3,520.1**	**3,590.5**	**3,672.6**
Military (Active Duty)	**37.8**	**37.8**	**37.8**	**37.8**	**37.8**	**37.8**	**37.8**
Self-Employed	**147.4**	**158.8**	**166.1**	**171.2**	**176.0**	**179.5**	**183.6**
Total Employment	**3,132.3**	**3,372.9**	**3,525.9**	**3,633.4**	**3,733.9**	**3,807.8**	**3,894.0**

Figure 3: Round 10.0 Econometric Model Change in Employment Sectors 2020 – 2050 (Thousands)
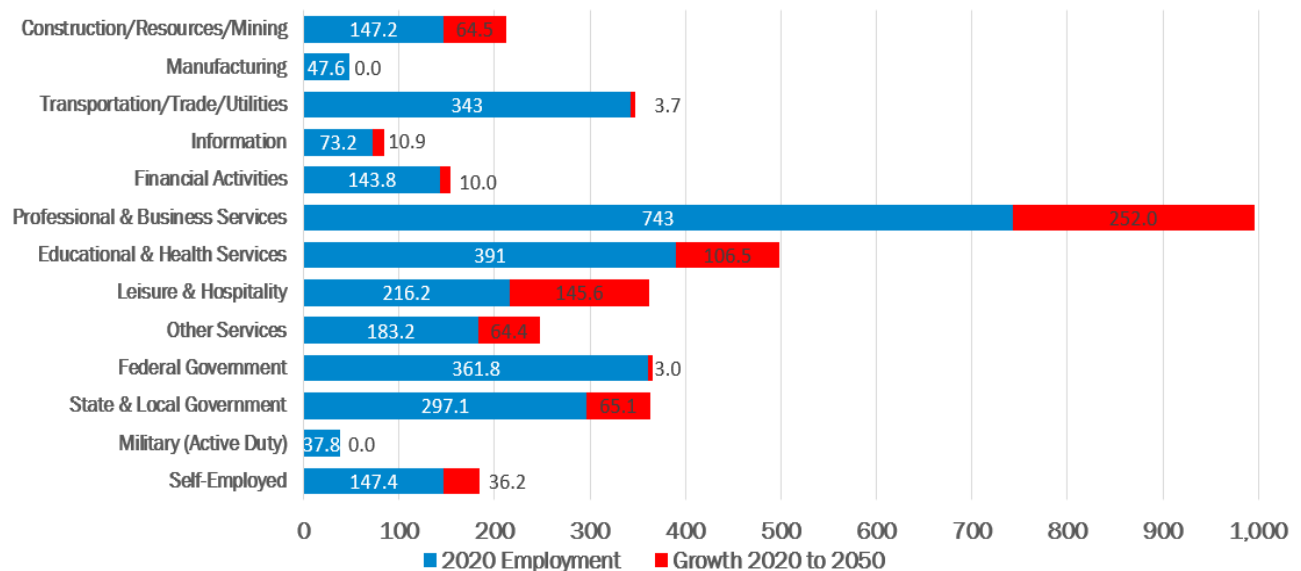
Population and Households

The population in the region will reach nearly 6.8 million people by 2050. The region will add 1.1 million people to an existing 2020 total of 5.7 million people, or a 19 percent increase.

The region will have 2.8 million households by 2050, an additional 704,000 households to an existing 2020 total of 2.1 million households, or a 33 percent increase.

Table 4: Round 10.0 Econometric Model Results – Total Population and Households (Thousands)

	2020	2025	2030	2035	2040	2045	2050
Total Population	5,701.5	5,767.8	6,000.1	6,241.7	6,448.9	6,636.7	6,809.5
Heads of Households	2,121.3	2,209.5	2,331.6	2,462.7	2,588.2	2,708.5	2,225.6

Figure 4: Historic and Forecast Population, 1990 to 2050
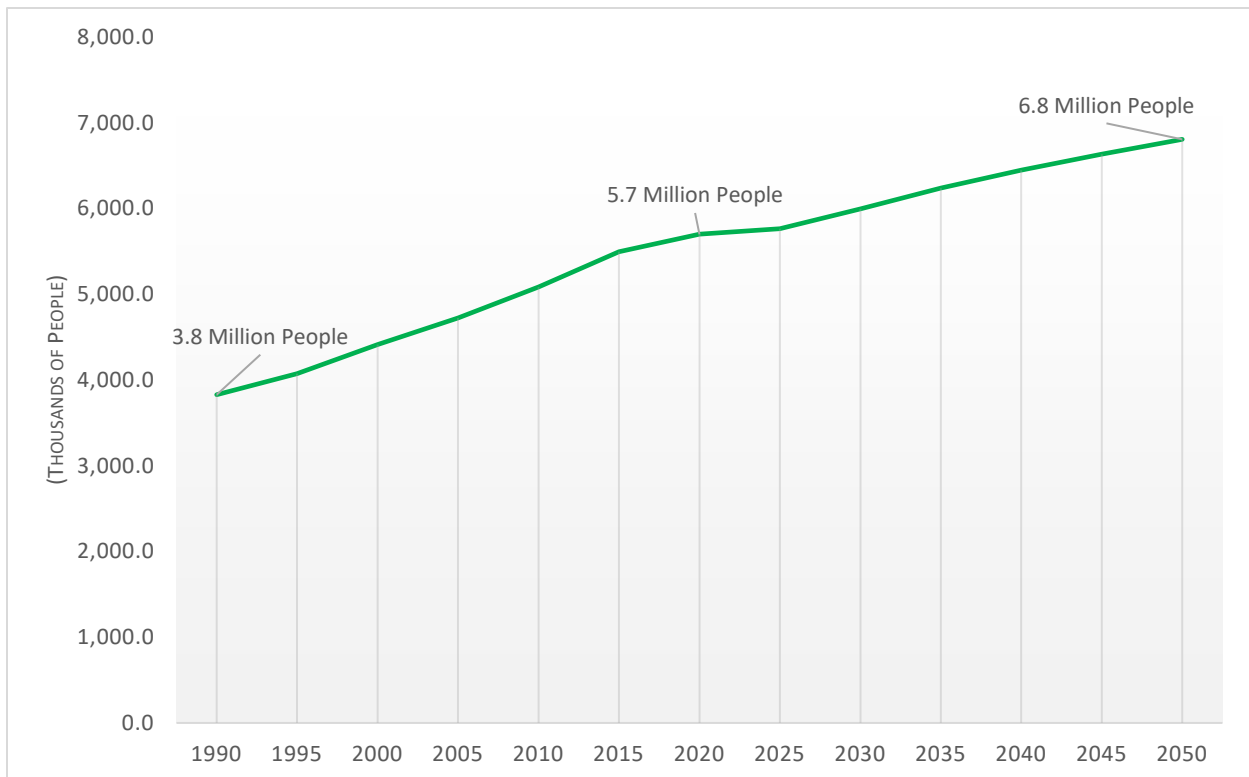
Figure 5: Share of 2020 to 2050 Population Growth by Age Cohort
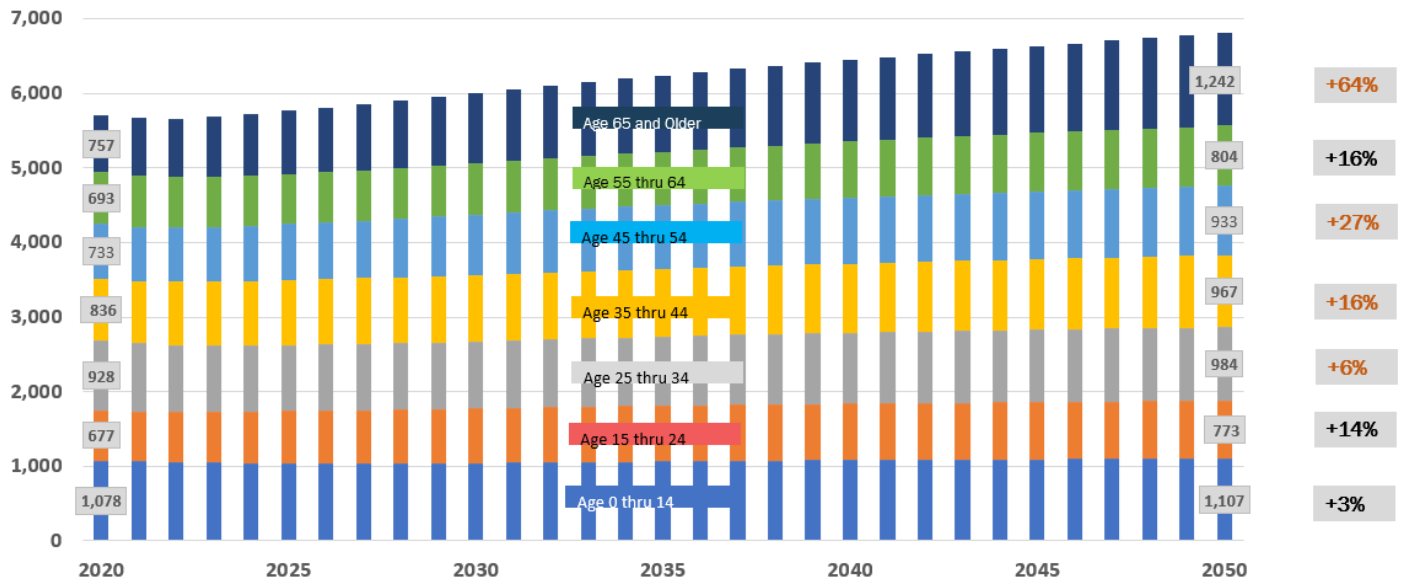
Figure 6: Historic and Forecast Households, 1990 to 2050
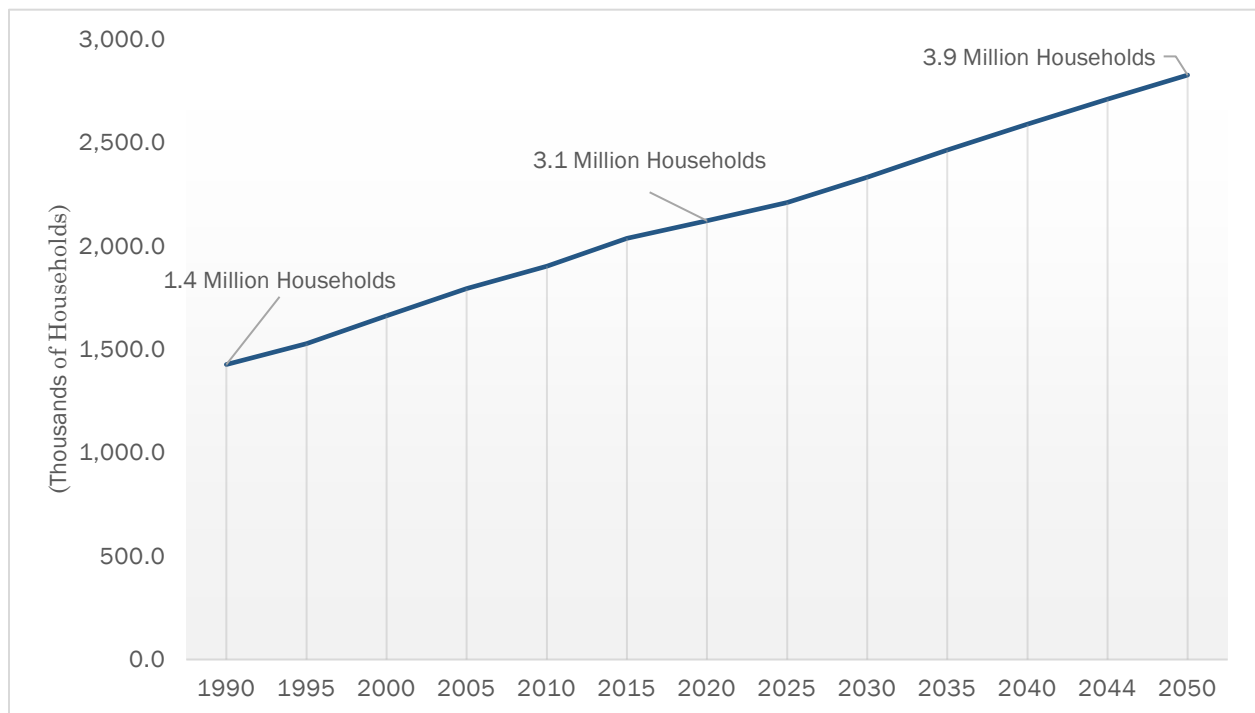
ROUND 10.0 COOPERATIVE FORECAST TECHNICAL ASSISTANCE

During the spring of 2022, COG and TPB staff requested the support of an outside consultant to provide technical assistance to help answer and understand the potential short-term and long-term impacts of the COVID-19 pandemic on growth assumptions related to the Round 10.0 Cooperative Forecast. The consultant, ICF, provided assistance to:

- Better understand the impact of the COVID-19 pandemic on utilization, density, and development of commercial office space in the region;
- Develop a "range" of potential regional forecasts to 2050 given ongoing economic uncertainties;
- Access emerging trends in regional housing location and choice; and
- Increase understanding of future regional household size trends (ICF Technical Memo, page 2)

Figure 7: ICF Estimate of Regional Employment Change due to COVID (Thousands)
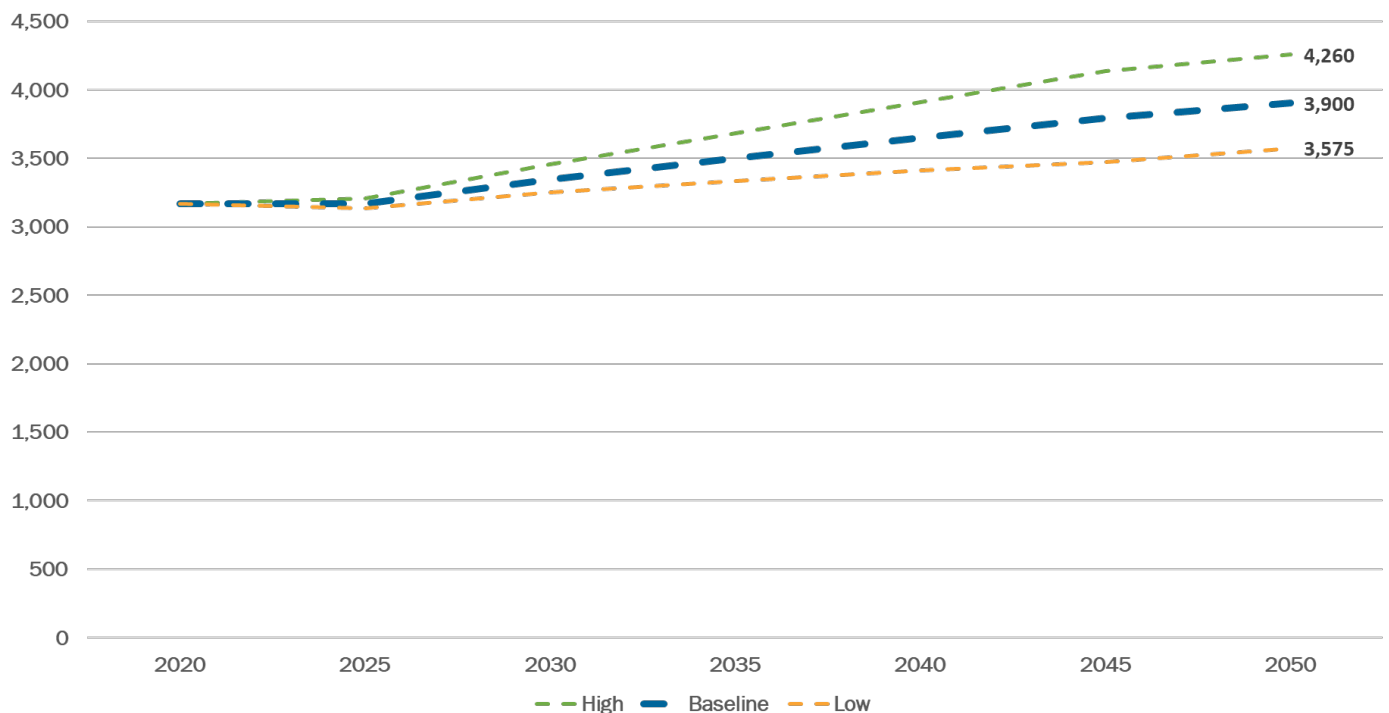
Figure 8: ICF Estimate of Regional Population Change due to COVID (Thousands)

- - - High — Baseline - - - Low
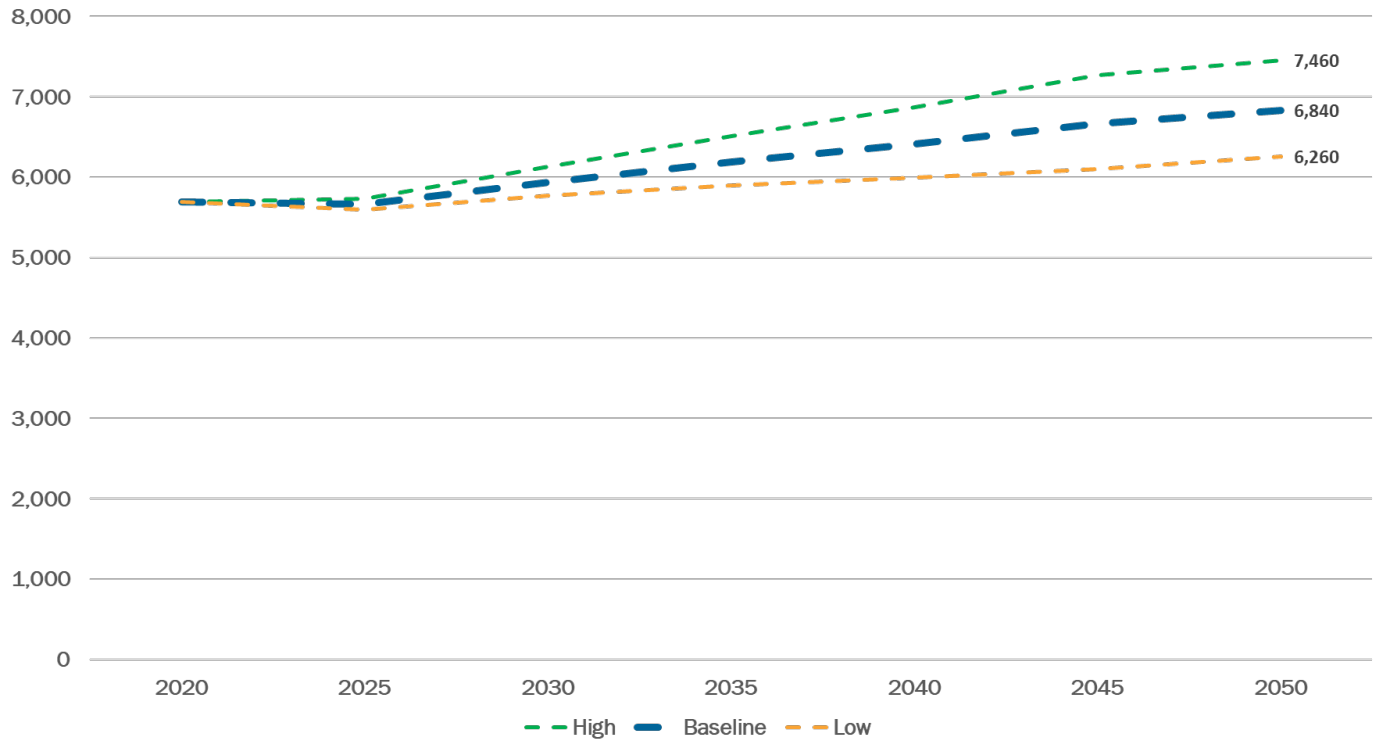
Figure 9: ICF Estimate of Regional Households Change due to COVID (Thousands)

- - - High — Baseline - - - Low
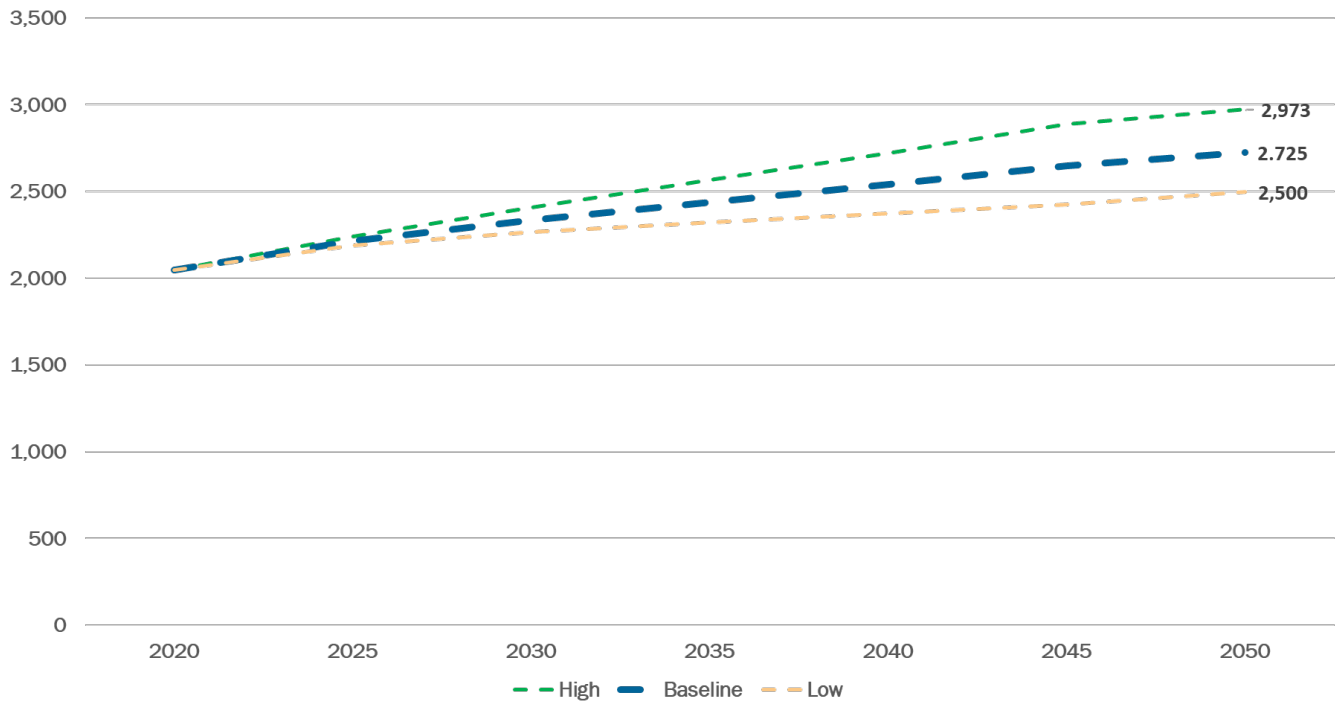
JURISDICTIONAL FORECASTS

Employment

Job growth in Northern Virginia (43.8 percent) will outpace the growth anticipated in Maryland jurisdictions (32.4 percent), and the District of Columbia (23.8 percent). The District of Columbia, Fairfax County, and Montgomery County will add the largest number of new jobs to the region's employment base during the 2020 to 2050 forecast period, followed by Prince George's and Loudoun counties.

Collectively, the region's inner suburbs will add the largest number of new jobs, 441,400 by 2050. As with population and household growth, the largest percentage increases in employment will occur in the Outer Suburbs of Virginia and Maryland. Together, these outer jurisdictions will add 251,600 jobs to the region's base, increasing their total number of jobs 25.4 percent by 2050. Despite the tremendous growth in suburban employment shown in the forecasts, the District of Columbia will continue to have the largest number of jobs of any single jurisdiction and would account for about a fifth of the region's employment in 2050. Collectively, the Central Jurisdictions will account for 30.0 percent of regional employment.

Table 5: Summary of Employment Forecasts Round 10.1 Cooperative Forecasts (Thousands)

JURISDICTION	Round 10.1 Base Year 2020	2025	2030	2035	2040	2045	2050	2020 to 2050 Growth Number	% Change	Share
District of Columbia	785.9	846.1	886.3	923.5	954.4	989.0	1,021.6	235.7	30.0%	23.8%
Arlington County	221.6	220.5	233.6	250.6	257.4	261.8	266.1	44.5	20.1%	4.5%
City of Alexandria	101.8	97.2	101.7	104.0	110.4	114.9	119.1	17.3	17.0%	1.7%
Central Jurisdictions	**1,109.3**	**1,163.8**	**1,221.6**	**1,278.0**	**1,322.1**	**1,365.7**	**1,406.8**	**297.5**	**26.8%**	**30.0%**
Montgomery County	493.6	522.9	545.6	568.3	591.0	613.8	636.5	142.9	29.0%	14.4%
City of Rockville (1)	76.4	78.7	81.1	83.8	87.8	91.1	94.5	18.0	23.6%	1.8%
City of Gaithersburg (1)	43.0	48.0	52.0	54.5	56.5	58.0	59.0	16.0	37.2%	1.6%
Prince George's County	343.5	357.6	375.2	394.2	410.5	429.8	448.7	105.2	30.6%	10.6%
Fairfax County	658.8	690.5	750.8	788.8	812.5	832.0	842.0	183.2	27.8%	18.5%
City of Fairfax	20.5	22.0	22.3	22.6	22.9	23.2	23.5	3.0	14.6%	0.3%
City of Falls Church	12.4	13.1	15.4	16.5	17.4	18.3	19.4	7.1	57.0%	0.7%
Inner Suburbs	**1,528.7**	**1,606.2**	**1,709.2**	**1,790.3**	**1,854.4**	**1,917.0**	**1,970.1**	**441.4**	**28.9%**	**44.6%**
Loudoun County	187.7	221.7	237.1	249.1	260.4	269.4	277.2	89.5	47.7%	9.0%
Prince William County	161.8	172.2	194.3	209.8	223.4	235.6	246.4	84.6	52.3%	8.5%
City of Manassas	25.3	26.1	26.9	27.7	28.3	28.8	29.3	3.9	15.5%	0.4%
City of Manassas Park	4.3	4.7	5.0	5.1	5.2	5.3	5.4	1.1	25.5%	0.1%
Charles County	43.9	46.1	49.8	54.0	57.4	60.0	62.2	18.3	41.8%	1.8%
Frederick County	108.3	115.6	123.8	132.5	141.8	151.8	162.5	54.2	50.1%	5.5%
City of Frederick (2)	57.4	60.1	64.4	67.6	69.5	74.4	79.6	22.2	38.7%	2.2%
Outer Suburbs	**531.4**	**586.4**	**636.8**	**678.2**	**716.5**	**750.9**	**783.0**	**251.6**	**47.4%**	**25.4%**
Virginia Jurisdictions	**1,394.3**	**1,468.1**	**1,587.1**	**1,674.1**	**1,737.9**	**1,789.2**	**1,828.5**	**434.2**	**31.1%**	**43.8%**
Maryland Jurisdictions	**989.2**	**1,042.3**	**1,094.3**	**1,149.0**	**1,200.8**	**1,255.4**	**1,309.9**	**320.7**	**32.4%**	**32.4%**
COG Region	**3,169.4**	**3,356.4**	**3,567.6**	**3,746.6**	**3,893.0**	**4,033.7**	**4,160.0**	**990.6**	**31.3%**	**100.0%**

(1) Included in the Montgomery County total.
(2) Included in the Frederick County total.

Figure 10: Employment Growth by Jurisdiction, 2020 to 2050 (Thousands)

Legend: ■ 2020 Employment   ▦ 2020 to 2050 Employment Growth

Jurisdiction	2020 Employment	2020 to 2050 Employment Growth
District of Columbia	785.9	235.7
Fairfax County	658.8	183.2
Montgomery County	493.6	142.9
Prince George's County	343.5	105.2
Arlington County	221.6	44.5
Loudoun County	187.7	89.5
Prince William County	161.8	84.6
Frederick County	108.3	54.2
City of Alexandria	101.8	17.3
City of Rockville	76.4	18.0
City of Frederick	57.4	22.2
Charles County	43.6	18.3
City of Gaithersburg	43.0	16.0
City of Manassas	25.8	3.9
City of Fairfax	20.5	3.0
City of Falls Church	12.4	7.1
City of Manassas Park	4.3	1.1

(Thousands)

Figure 11: Percent Change in Employment by Jurisdiction, 2020 to 2050

Jurisdiction	Percent Change
District of Columbia	30%
Fairfax County	28%
Montgomery County	29%
Prince George's County	31%
Arlington County	20%
Loudoun County	48%
Prince William County	52%
Frederick County	50%
City of Alexandria	17%
City of Rockville	24%
City of Frederick	39%
Charles County	42%
City of Gaithersburg	37%
City of Manassas	15%
City of Fairfax	15%
City of Falls Church	57%
City of Manassas Park	26%

Map 2: 2020 Employment and Projected 2020 to 2050 Employment Growth

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

Population

The region's population is expected to grow steadily through the forecast period, adding an average of approximately 48,000 persons a year. Population will be influenced by the region's economy, rate of in-migration and international immigration, and possible decline in average household size.

Most of the population growth will occur in Prince George's, Fairfax, and Montgomery counties. The outer jurisdictions will experience the fastest rates of growth, led by Frederick County (57.8 percent), Charles County (44.4 percent), and the City of Frederick (43.3 percent). The region's Central Jurisdictions will also grow. In the District of Columbia, population will increase by 22.5 percent during the forecast period. In the City of Alexandria and Arlington County, population will increase by 47.7 and 29.4 percent, respectively.

Table 6: Summary of Population Forecasts Round 10.1 Cooperative Forecasts (Thousands)

JURISDICTION	Round 10.1 Base Year 2020	2025	2030	2035	2040	2045	2050	2020 to 2050 Growth Number	% Change	Share
District of Columbia	689.5	697.6	728.6	757.2	787.1	816.4	844.4	154.9	22.5%	10.8%
Arlington County	238.4	247.4	258.8	269.8	283.1	295.4	308.5	70.2	29.4%	4.9%
City of Alexandria	159.5	168.6	182.7	197.6	211.5	227.2	235.5	76.1	47.7%	5.3%
Central Jurisdictions	**1,087.4**	**1,113.6**	**1,170.1**	**1,224.5**	**1,281.6**	**1,339.1**	**1,388.5**	**301.1**	**27.7%**	**20.9%**
Montgomery County	1,061.2	1,082.9	1,118.2	1,154.1	1,189.8	1,222.2	1,250.7	189.5	17.9%	13.2%
City of Rockville (1)	67.2	69.9	73.9	77.6	81.9	86.1	90.4	23.2	34.5%	1.6%
City of Gaithersburg (1)	69.7	72.5	75.7	78.5	81.2	83.7	85.8	16.1	23.2%	1.1%
Prince George's County	967.1	1,003.2	1,047.5	1,106.4	1,147.3	1,184.2	1,218.8	251.7	26.0%	17.5%
Fairfax County	1,171.9	1,200.8	1,240.9	1,277.0	1,310.7	1,345.0	1,379.4	207.5	17.7%	14.4%
City of Fairfax	24.147	27.813	32.661	34.361	36.077	37.810	39.561	15.4	63.8%	1.1%
City of Falls Church	14.656	15.477	18.010	19.592	20.733	21.804	23.268	8.6	58.8%	0.6%
Inner Suburbs	**3,239.0**	**3,330.2**	**3,457.3**	**3,591.4**	**3,704.6**	**3,811.0**	**3,911.7**	**672.7**	**20.8%**	**46.7%**
Loudoun County	421.0	455.2	484.4	506.9	522.6	533.8	543.7	122.7	29.2%	8.5%
Prince William County	480.6	503.5	536.6	553.0	565.0	573.6	579.5	98.9	20.6%	6.9%
City of Manassas	42.8	43.7	46.3	47.6	48.5	49.5	50.4	7.7	17.9%	0.5%
City of Manassas Park	17.2	19.0	20.4	20.9	21.4	21.9	22.4	5.2	30.3%	0.4%
Charles County	168.0	176.3	193.6	203.8	216.5	230.4	242.7	74.6	44.4%	5.2%
Frederick County	271.7	293.2	316.3	341.3	368.3	397.4	428.8	157.1	57.8%	10.9%
City of Frederick (2)	78.2	83.8	89.5	95.1	100.8	106.4	112.0	33.9	43.3%	2.4%
Outer Suburbs	**1,401.3**	**1,491.0**	**1,597.8**	**1,673.6**	**1,742.4**	**1,806.7**	**1,867.6**	**466.3**	**33.3%**	**32.4%**
Virginia Jurisdictions	**2,570.1**	**2,681.5**	**2,820.9**	**2,926.7**	**3,019.6**	**3,106.2**	**3,182.4**	**612.4**	**23.8%**	**42.5%**
Maryland Jurisdictions	**2,468.1**	**2,555.7**	**2,675.7**	**2,805.6**	**2,921.9**	**3,034.2**	**3,141.0**	**672.9**	**27.3%**	**46.7%**
COG Region	**5,727.7**	**5,934.8**	**6,225.1**	**6,489.5**	**6,728.6**	**6,956.8**	**7,167.8**	**1,440.1**	**25.1%**	**100.0%**

(1) Included in the Montgomery County total.
(2) Included in the Frederick County total.

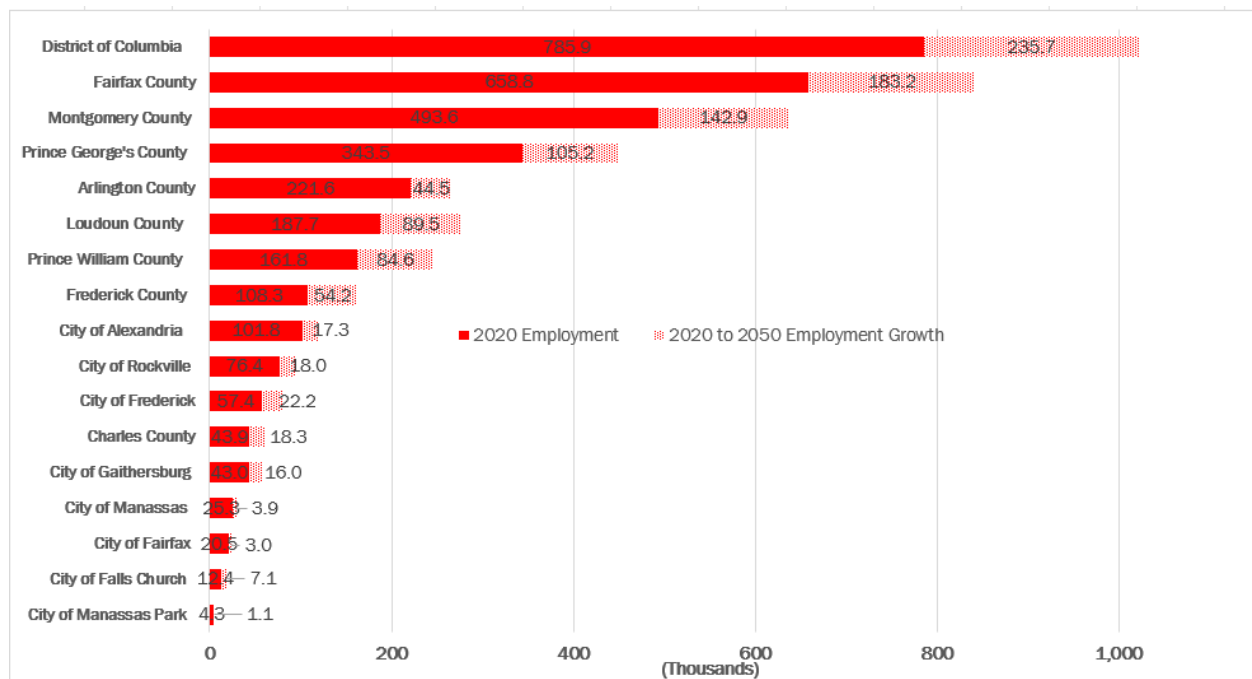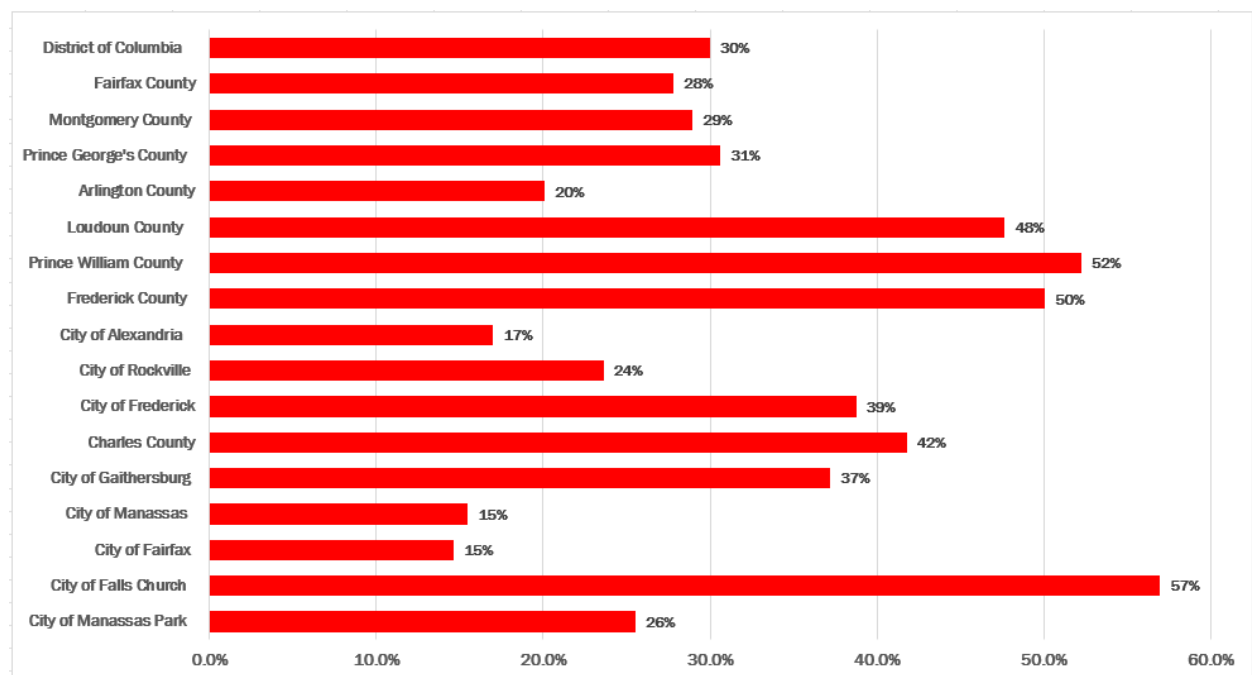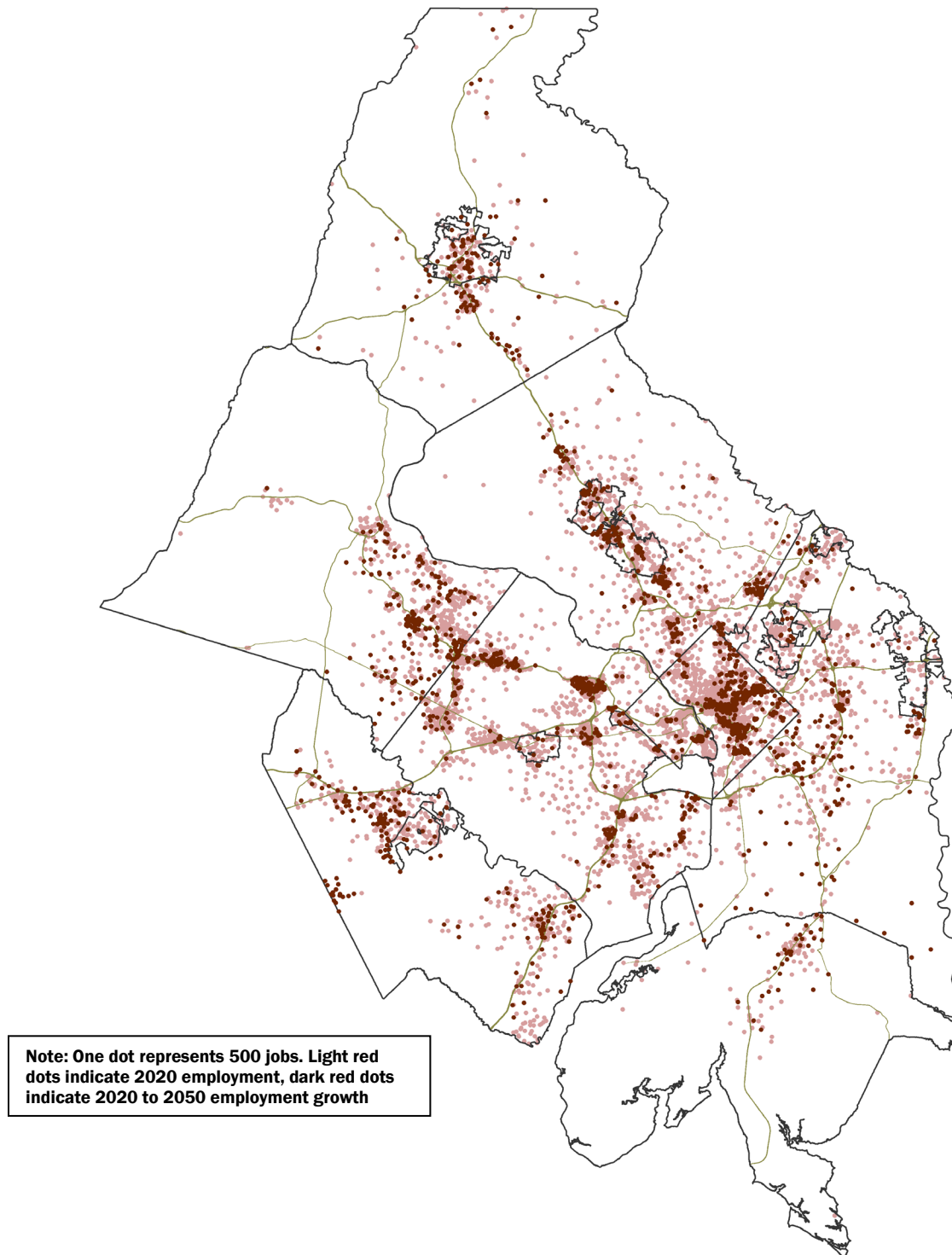**Figure 12: Population Growth by Jurisdiction, 2020 to 2050 (Thousands)**

Jurisdiction	2020 Population	2020 to 2050 Population Growth
Fairfax County	1,171.9	207.5
Montgomery County	1,061.2	189.5
Prince George's County	967.1	251.7
District of Columbia	689.5	154.9
Prince William County	480.6	98.9
Loudoun County	421.0	122.7
Frederick County	271.7	157.1
Arlington County	238.4	70.2
Charles County	168.0	74.6
City of Alexandria	159.5	76.1
City of Frederick	78.2	33.9
City of Rockville	67.2	23.2
City of Gaithersburg	69.7	16.1
City of Manassas	42.8	7.7
City of Fairfax	1.?	15.4
City of Falls Church		8.6
City of Manassas Park	7	5.2

Figure 13: Percent Change in Population Growth by Jurisdiction, 2020 to 2050

Jurisdiction	Percent Change
Fairfax County	18%
Montgomery County	18%
Prince George's County	26%
District of Columbia	22%
Prince William County	21%
Loudoun County	29%
Frederick County	58%
Arlington County	29%
Charles County	44%
City of Alexandria	48%
City of Frederick	43%
City of Rockville	34%
City of Gaithersburg	23%
City of Manassas	18%
City of Fairfax	64%
City of Falls Church	59%
City of Manassas Park	30%

Map 3: 2020 Population and Projected 2020 to 2050 Population Growth

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

Households

The addition of more than 684,500 households during the 2020 to 2050 forecast period reflects the growth in jobs and in-migration to the region. The largest number of new households will be in the District of Columbia, Fairfax County, and Montgomery County, which collectively contribute almost half of the household growth during the forecast period. The City of Falls Church will grow at a rate of 108.5 percent, the most rapidly of all jurisdictions, adding about 6,300 households to the 2020 total of 5,800.

Regional economic growth will continue to attract new residents and fuel a general demand for new housing. Households, or occupied housing units, in turn form the basis for population forecasts for most jurisdictions participating in the Cooperative Forecasting process. Planners monitor housing construction and estimate population growth by multiplying the number of occupied housing units by the average number of people in the jurisdiction's households.

Table 7: Summary of Household Forecasts Round 10.1 Cooperative Forecasts (Thousands)

JURISDICTION	Round 10.1 Base Year 2020	2025	2030	2035	2040	2045	2050	2020 to 2050 Growth Number	% Change	Share
District of Columbia	312.4	344.2	366.8	386.6	407.6	426.0	441.4	129.0	41.3%	18.8%
Arlington County	109.7	120.7	127.1	133.7	141.1	147.9	155.4	45.7	41.6%	6.7%
City of Alexandria	75.6	81.8	91.5	101.7	111.3	122.1	127.8	52.2	69.1%	7.6%
Central Jurisdictions	**497.7**	**546.7**	**585.4**	**622.0**	**659.9**	**696.1**	**724.6**	**226.9**	**45.6%**	**33.1%**
Montgomery County	386.6	398.4	416.5	434.2	450.1	463.2	474.3	87.7	22.7%	12.8%
City of Rockville (1)	26.9	28.1	30.0	31.7	33.6	35.7	37.8	11.0	40.8%	1.6%
City of Gaithersburg (1)	25.9	27.2	28.9	30.3	31.7	33.0	34.2	8.3	32.0%	1.2%
Prince George's County	342.2	355.7	373.5	395.2	409.8	423.0	435.2	93.0	27.2%	13.6%
Fairfax County	417.5	429.5	446.1	461.8	476.6	491.8	506.8	89.4	21.4%	13.1%
City of Fairfax	9.3	10.6	13.0	13.8	14.6	15.4	16.3	6.9	74.3%	1.0%
City of Falls Church	5.8	7.3	8.7	9.6	10.3	11.1	12.1	6.3	108.5%	0.9%
Inner Suburbs	**1,161.5**	**1,201.5**	**1,257.8**	**1,314.7**	**1,361.5**	**1,404.5**	**1,444.7**	**283.2**	**24.4%**	**41.4%**
Loudoun County	137.5	148.2	158.7	166.9	172.8	177.2	181.0	43.5	31.6%	6.4%
Prince William County	153.9	158.1	173.4	180.0	185.1	189.0	191.9	37.9	24.6%	5.5%
City of Manassas	14.0	14.3	15.1	15.5	15.8	16.1	16.4	2.4	17.5%	0.4%
City of Manassas Park	5.4	6.2	6.9	7.1	7.4	7.7	8.0	2.6	47.9%	0.4%
Charles County	59.1	64.3	71.2	75.3	80.0	85.2	89.7	30.6	51.8%	4.5%
Frederick County	98.4	106.2	114.5	123.5	133.2	144.3	155.7	57.3	58.3%	8.4%
City of Frederick (2)	31.8	34.1	36.3	38.7	40.9	43.3	45.6	13.8	43.3%	2.0%
Outer Suburbs	**468.3**	**497.2**	**539.9**	**568.3**	**594.3**	**619.4**	**642.6**	**174.4**	**37.2%**	**25.5%**
Virginia Jurisdictions	**928.7**	**976.6**	**1,040.6**	**1,090.2**	**1,135.0**	**1,178.3**	**1,215.7**	**287.0**	**30.9%**	**41.9%**
Maryland Jurisdictions	**886.3**	**924.6**	**975.7**	**1,028.2**	**1,073.1**	**1,115.6**	**1,154.9**	**268.6**	**30.3%**	**39.2%**
COG Region	**2,127.5**	**2,245.4**	**2,383.1**	**2,505.0**	**2,615.7**	**2,720.0**	**2,812.0**	**684.5**	**32.2%**	**100.0%**

(1)   Included in the Montgomery County total.
(2)   Included in the Frederick County total.

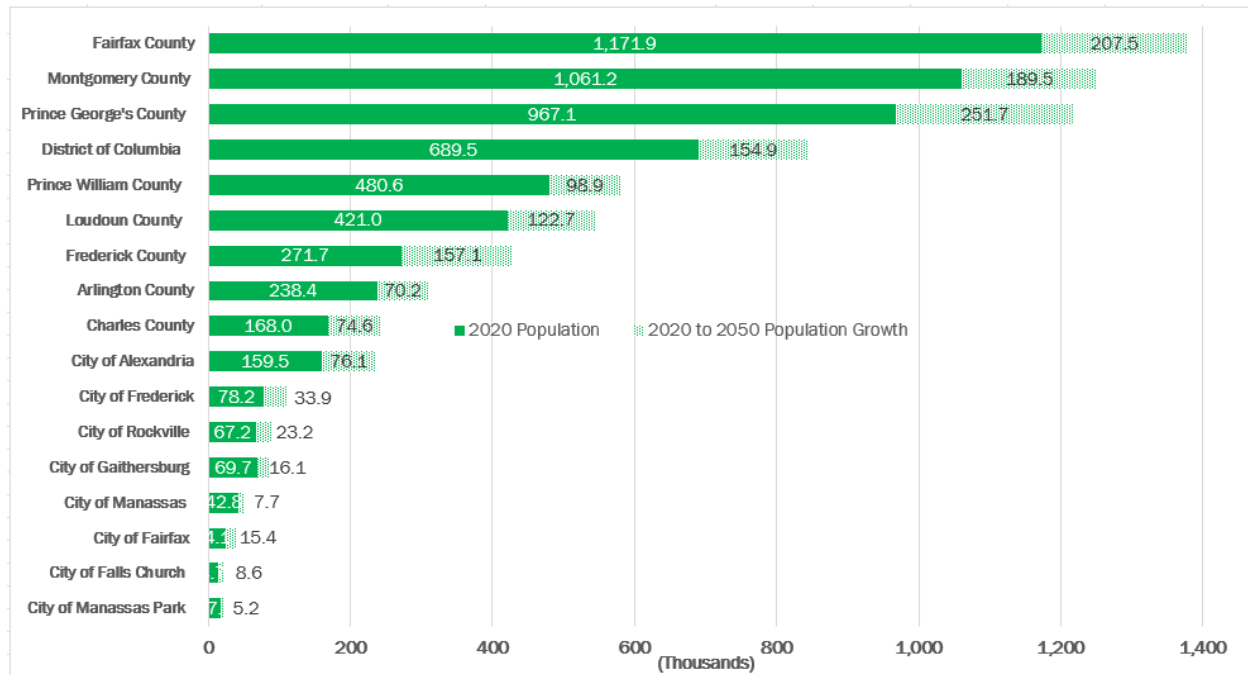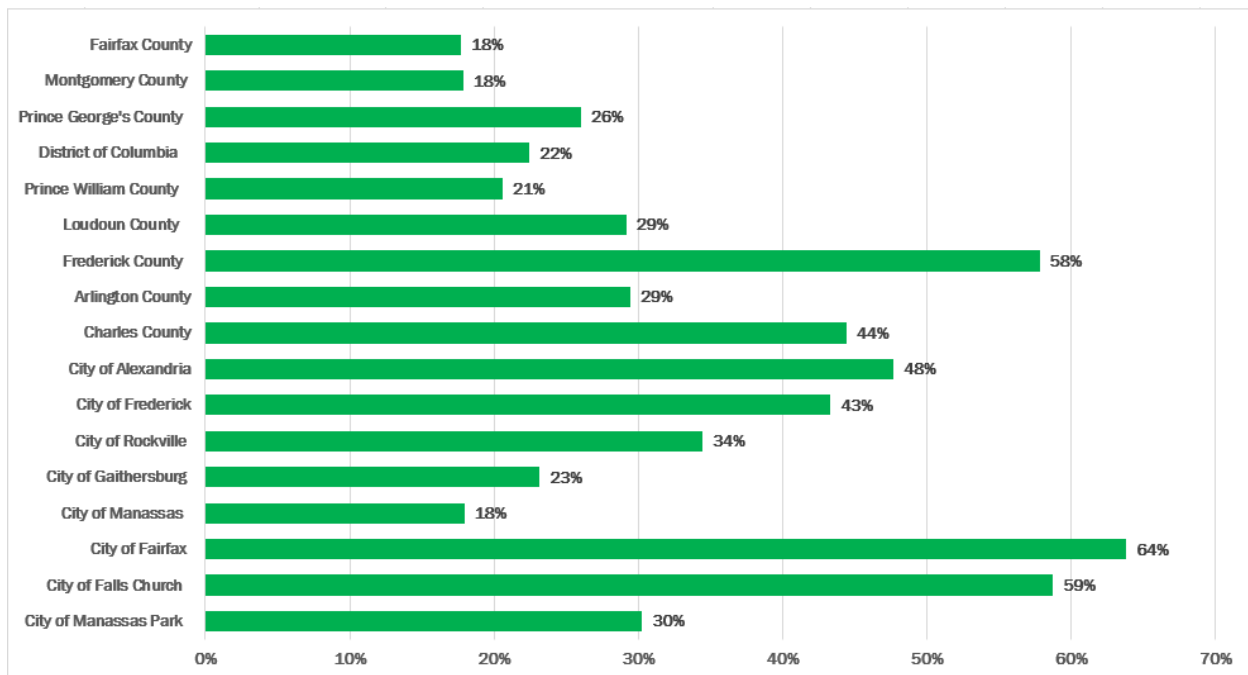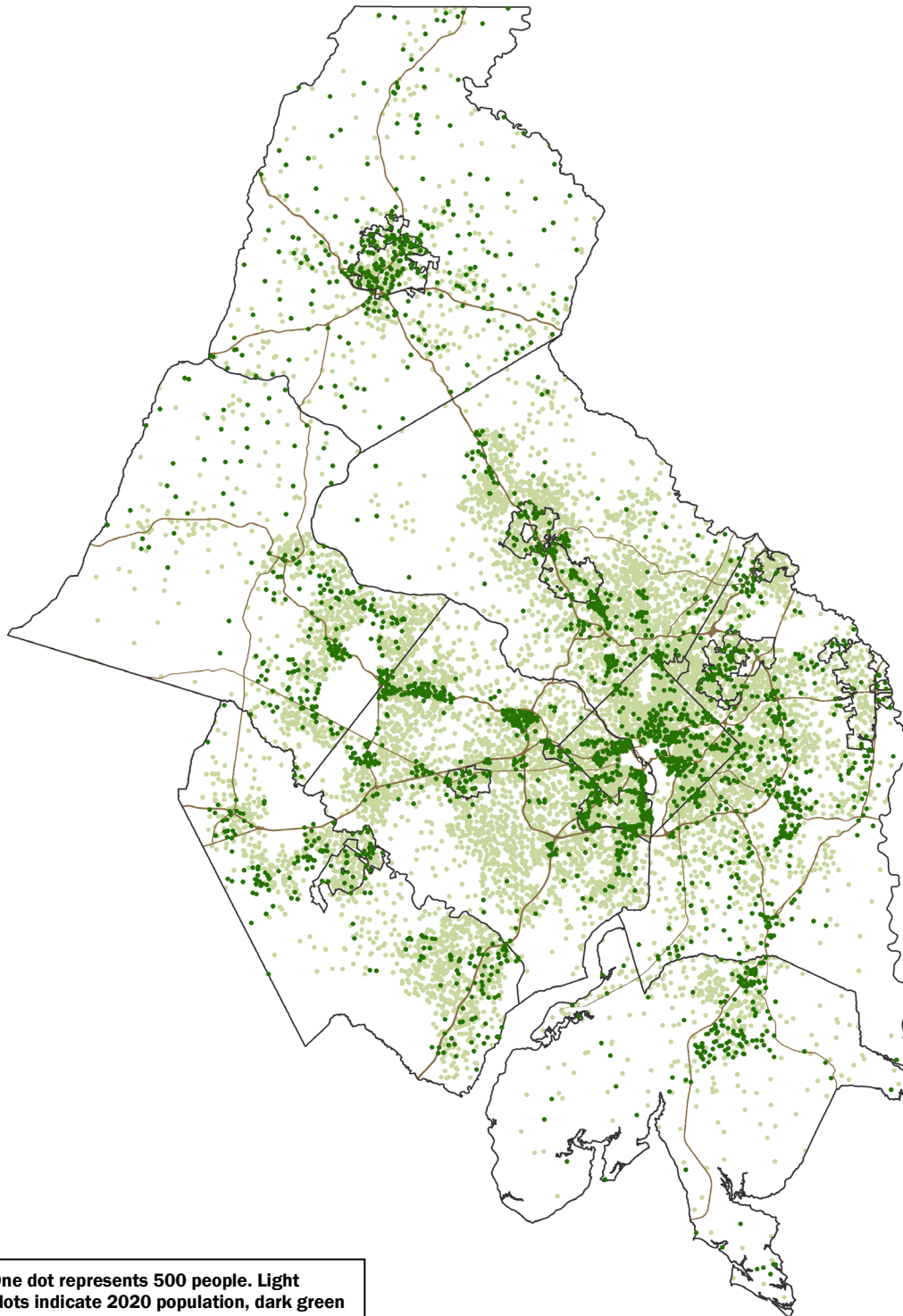**Figure 14: Household Growth by Jurisdiction, 2020 to 2050 (Thousands)**

Legend: ■ 2020 Households ▨ 2020 to 2050 Household Growth

Jurisdiction	2020 Households	2020 to 2050 Household Growth
Fairfax County	417.5	89.4
Montgomery County	386.6	87.7
Prince George's County	342.2	93.0
District of Columbia	312.4	129.0
Prince William County	153.9	37.9
Loudoun County	137.5	43.5
Arlington County	109.7	45.7
Frederick County	98.4	57.3
City of Alexandria	75.6	52.2
Charles County	59.1	30.6
City of Frederick	31.8	13.8
City of Rockville	26.9	11.0
City of Gaithersburg	25.9	8.3
City of Manassas	14.0	2.4
City of Fairfax	9.3	6.9
City of Falls Church	5.8	6.3
City of Manassas Park		2.6

Figure 15: Percent Change in Households by Jurisdiction, 2020 to 2050

Jurisdiction	Percent Change
Fairfax County	21%
Montgomery County	23%
Prince George's County	27%
District of Columbia	41%
Prince William County	25%
Loudoun County	32%
Arlington County	42%
Frederick County	58%
City of Alexandria	69%
Charles County	52%
City of Frederick	43%
City of Rockville	41%
City of Gaithersburg	32%
City of Manassas	17%
City of Fairfax	74%
City of Falls Church	109%
City of Manassas Park	48%

Map 4: 2020 Households and Projected 2020 to 2050 Household Growth

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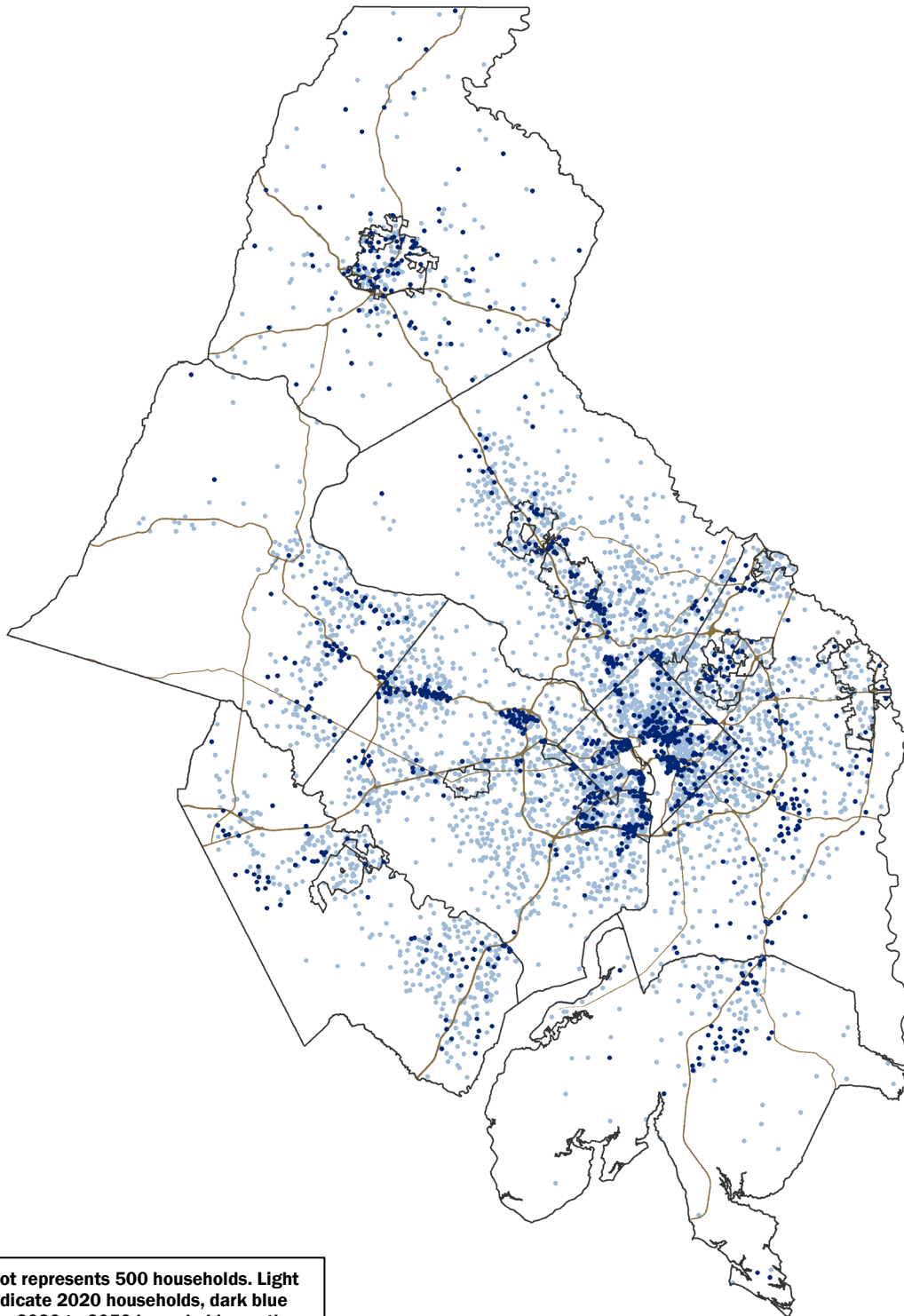
REGIONAL ACTIVITY CENTERS

In 2024 and 2025, COG worked with local planning officials to carry out an extensive redesign of the Regional Activity Centers (RACs) map. The new map was approved by the COG Board of Directors in May 2025 and reflects 145 Regional Activity Centers that include urbanized places to traditional downtowns.

The Region Forward Coalition established a target for the region to capture 75 percent of the square footage of new commercial construction and 50 percent of new households in Regional Activity Centers. Based on the new Round 10.1 Cooperative Forecasts, in 2020, 63 percent of the region's jobs were located in Regional Activity Centers. Over the 2020 and 2050 forecast period, 69 percent of job growth will be concentrated in Regional Activity Centers. The highest percentage of jobs located in Regional Activity Centers in 2050 will be found in the Central Jurisdictions: City of Alexandria (88 percent), District of Columbia (82 percent), and Arlington County (86 percent).

Households in Regional Activity Centers accounted for 30 percent of the region's total households in 2020. From 2020 to 2050, 61 percent of the household growth is projected to occur in Regional Activity Centers. In 2050, jurisdictions having the highest share of households located in Regional Activity Centers will be in the Central Jurisdictions: City of Alexandria (60 percent), District of Columbia (53 percent), and Arlington County (73 percent).

Regional Activity Centers Map
based on the COG Round 10.0 Cooperative Forecast
Approved May 14, 2025 by COG Board of Directors

Regional Activity Center

High Capacity Transit

Future High Capacity Transit

Highway

Metropolitan Washington
Council of Governments

Each half-mile circle represents the approximate location of a Regional Activity Center. Some circle locations have been adjusted to increase map legibility and avoid overlapping.

District of Columbia
1. Monumental Core
2. Southwest Waterfront
3. Downtown DC
4. Downtown East DC
5. West End
6. Golden Triangle
7. U Street/Howard University
8. Adams Morgan/Dupont
9. Georgetown
10. Friendship Heights/Tenleytown
11. Former Walter Reed/Upper Georgia Ave
12. Petworth/Parkview
13. Columbia Heights
14. North Capitol Crossroads
15. Convention Center/Shaw
16. NoMA
17. New York Ave NE
18. Brookland/Catholic University
19. Rhode Island Ave Metro
20. Takoma Metro
21. Minnesota Ave and Benning Road Metro
22. H Street
23. Capitol Hill
24. Capitol Riverfront
25. Stadium-Armory
26. Anacostia/Poplar Point/St. Elizabeths

Montgomery County
27. Metropolitan Grove
28. Germantown
29. Clarksburg
30. Frederick Ave Corridor/Lakeforest Mall
31. Olde Towne Gaithersburg
32. Shady Grove
33. King Farm/Shady Grove Metro
34. Glenmont
35. Kensington
36. Wheaton
37. White Oak
38. Takoma/Langley Crossroads
39. Silver Spring
40. Bethesda
41. Medical Center/NIH
42. Grosvenor
43. North Bethesda
44. Twinbrook and Rockville Pike
45. Tower Oaks
46. Rock Spring
47. Rockville Town Center
48. Montgomery College-Rockville
49. Fallsgrove and Research Boulevard
50. Life Sciences Center/Crown Farm
51. Kentlands

Prince George's County
52. National Harbor
53. Oxon Hill
54. Branch Ave
55. Suitland
56. Naylor Rd-Southern Ave
57. Greenbelt
58. UMD Purple Line
59. West Hyattsville Metro
60. Port Towns
61. Hyattsville Crossing
62. College Park Metro
63. New Carrollton
64. Landover Metro
65. Capitol Heights-Addison Road
66. Morgan Boulevard
67. Largo Town Center
68. Landover Gateway
69. Bowie
70. Laurel
71. Westphalia Town Center

Arlington County
72. Ballston
73. Langston Boulevard
74. Washington Street/East Falls Church Metro
75. Virginia Square
76. Clarendon
77. Rosslyn
78. Court House
79. Columbia Pike
80. Pentagon City
81. Pentagon
82. Crystal City
83. Shirlington
84. Bailey's Crossroads-Western Gateway

City of Alexandria
85. Eisenhower West/Landmark/Van Dorn
86. AlexWest-Beauregard
87. Potomac Yard
88. Old Town Alexandria/Old Town North
89. Braddock Road Metro
90. Carlyle-Eisenhower East

Fairfax County, Falls Church and City of Fairfax
91. Centreville
92. George Mason University
93. Fairfax City
94. Fairfax Center
95. Dulles/Route 28 Corridor
96. Town of Herndon
97. Wiehle-Reston East
98. Reston Town Center
99. Herndon Metro
100. Vienna Metro
101. Town of Vienna
102. Merrifield
103. Tysons
104. McLean
105. West Falls Church/West Broad Street
106. East End/Seven Corners
107. Annandale
108. Beltway South
109. Franconia-Springfield
110. Beacon-Groveton
111. Huntington-Penn Daw
112. Bush Hill/Van Dorn Street Metro
113. Hybla Valley-Gum Springs
114. Lorton
115. Fort Belvoir North

Loudoun County
116. Leesburg Core
117. Ashburn Station/Loudoun Gateway
118. Route 28 Central
119. Dulles Town Center
120. Route 28 North
121. North Ashburn
122. Route 28 South
123. Arcola

Prince William, Manassas and Manassas Park
124. Gainesville
125. Sudley
126. Innovation Park Town Center
127. Downtown Manassas
128. Manassas Park
129. Yorkshire
130. Fettler Park/Dumfries
131. Quartz District
132. Potomac Town Center
133. Potomac Mills
134. The Landing at Prince William
135. North Woodbridge Town Center
136. Potomac Shores

Frederick County
137. Brunswick
138. The Golden Mile
139. Urbana
140. South Frederick
141. Northeast Frederick
142. Downtown Frederick
143. Ballenger Creek

Charles County
144. La Plata
145. Waldorf

Multi-Jurisdiction RACs

District of Columbia and Montgomery
10. Friendship Heights/Tenleytown
20. Takoma Metro

Montgomery and Prince George's
38. Takoma/Langley Crossroads

Arlington and Falls Church
74. Washington Street/East Falls Church Metro

Arlington and Fairfax County
84. Bailey's Crossroads-Western Gateway

Falls Church and Fairfax County
105. West Falls Church/West Broad Street
106. East End/Seven Corners

21

Figure 16: Round 10.1 Share of Employment in Regional Activity Centers by Jurisdiction in 2020

Jurisdiction	Inside of Regional Activity Center	Outside of Regional Activity Center
Arlington County	84%	16%
Charles County	28%	72%
City of Alexandria	81%	19%
District of Columbia	83%	17%
Fairfax / City / Falls Church	71%	29%
Frederick County	52%	48%
Loudoun County	22%	78%
Montgomery County	62%	38%
Prince George's County	31%	69%
Prince William / Manassas/ Manassas Park	34%	66%
COG Region	63%	37%

■ Inside of Regional Activity Center   ■ Outside of Regional Activity Center

Figure 17: Round 10.1 Share of Employment in Regional Activity Centers by Jurisdiction in 2050

Jurisdiction	Inside of Regional Activity Center	Outside of Regional Activity Center
Arlington County	86%	14%
Charles County	32%	68%
City of Alexandria	88%	12%
District of Columbia	82%	18%
Fairfax / City / Falls Church	75%	25%
Frederick County	52%	48%
Loudoun County	30%	70%
Montgomery County	67%	33%
Prince George's County	30%	70%
Prince William / Manassas/ Manassas Park	34%	66%
COG Region	64%	36%

■ Inside of Regional Activity Center   ■ Outside of Regional Activity Center

Figure 18: Round 10.1 Share of Population in Regional Activity Centers by Jurisdiction in 2020

Jurisdiction	Inside of Regional Activity Center	Outside of Regional Activity Center
Arlington County	58%	42%
Charles County	6%	94%
City of Alexandria	45%	55%
District of Columbia	42%	58%
Fairfax / City / Falls Church	32%	68%
Frederick County	35%	65%
Loudoun County	9%	91%
Montgomery County	24%	76%
Prince George's County	16%	84%
Prince William / Manassas / Manassas Park	14%	86%
COG Region	26%	74%

■ Inside of Regional Activity Center ■ Outside of Regional Activity Center

Figure 19: Round 10.1 Share of Population in Regional Activity Centers by Jurisdiction in 2050

Jurisdiction	Inside of Regional Activity Center	Outside of Regional Activity Center
Arlington County	67%	33%
Charles County	15%	85%
City of Alexandria	54%	46%
District of Columbia	47%	53%
Fairfax / City / Falls Church	41%	59%
Frederick County	33%	67%
Loudoun County	16%	84%
Montgomery County	30%	70%
Prince George's County	18%	82%
Prince William / Manassas / Manassas Park	18%	82%
COG Region	32%	68%

■ Inside of Regional Activity Center ■ Outside of Regional Activity Center

Figure 20: Round 10.1 Share of Households in Regional Activity Centers by Jurisdiction in 2020

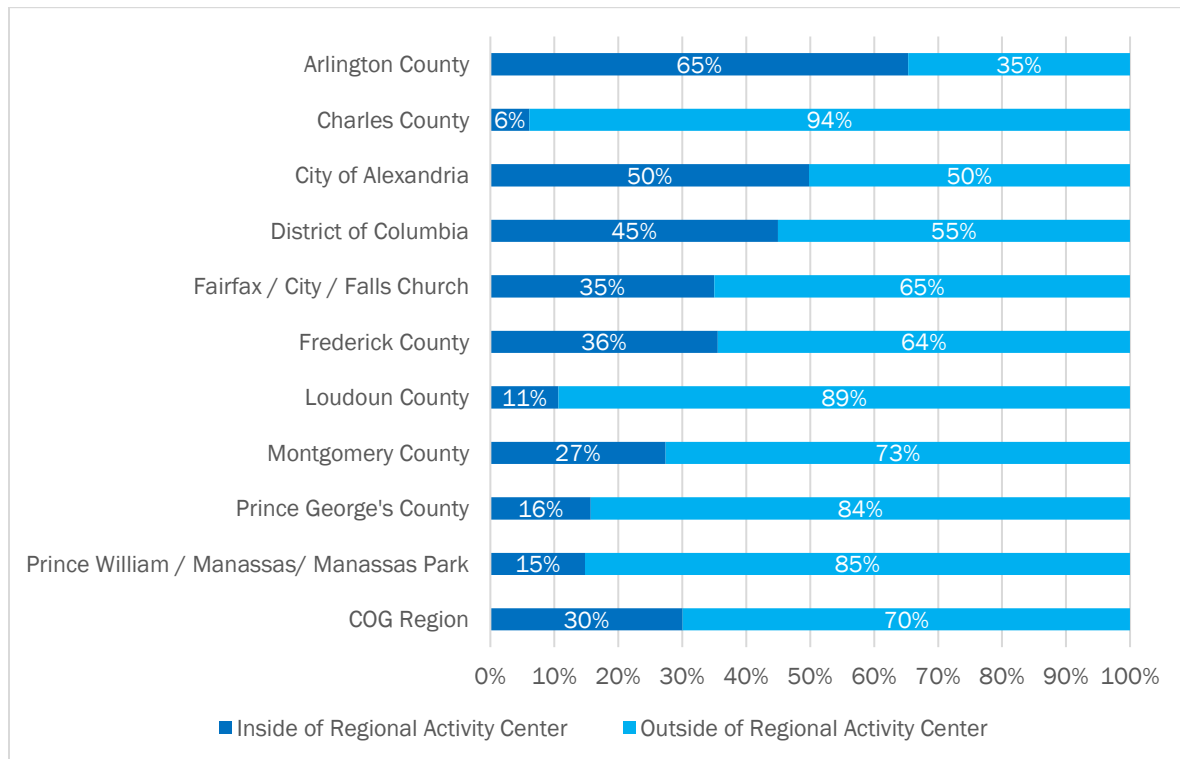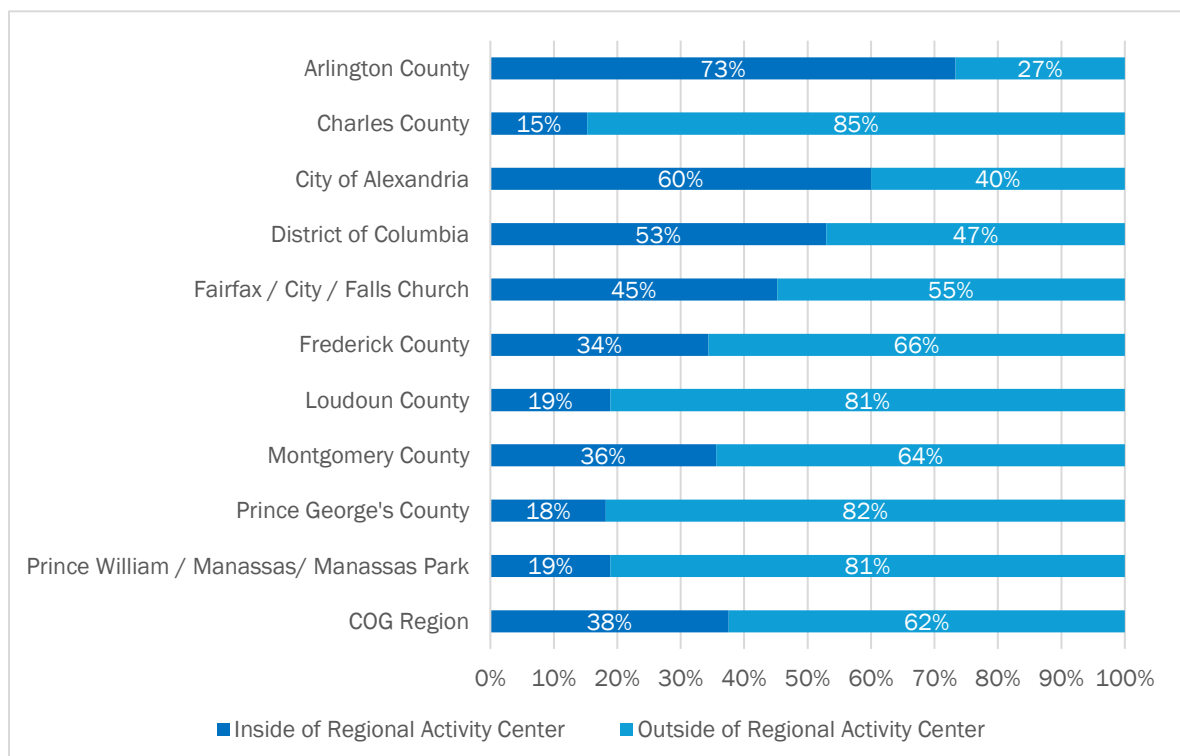| Jurisdiction	Inside of Regional Activity Center	Outside of Regional Activity Center
Arlington County	65%	35%
Charles County	6%	94%
City of Alexandria	50%	50%
District of Columbia	45%	55%
Fairfax / City / Falls Church	35%	65%
Frederick County	36%	64%
Loudoun County	11%	89%
Montgomery County	27%	73%
Prince George's County	16%	84%
Prince William / Manassas/ Manassas Park	15%	85%
COG Region	30%	70%

Figure 21: Round 10.1 Share of Households in Regional Activity Centers by Jurisdiction in 2050

Jurisdiction	Inside of Regional Activity Center	Outside of Regional Activity Center
Arlington County	73%	27%
Charles County	15%	85%
City of Alexandria	60%	40%
District of Columbia	53%	47%
Fairfax / City / Falls Church	45%	55%
Frederick County	34%	66%
Loudoun County	19%	81%
Montgomery County	36%	64%
Prince George's County	18%	82%
Prince William / Manassas/ Manassas Park	19%	81%
COG Region	38%	62%