



MEMORANDUM

TO: COG Board of Directors

FROM: Greg Goodwin, COG Principal Regional Planner
Kanti Srikanth, COG Deputy Executive Director for Metropolitan Planning

SUBJECT: Round 10.1 Update to the Cooperative Forecasts

DATE: October 1, 2025

The Metropolitan Washington Council of Governments (COG) established the Cooperative Forecasting Program in 1975 to provide for the development population, household and employment growth projections that could be used throughout the region as a consistent set of planning assumptions. The current set of Cooperative Forecasts, Round 10, is a “major” update approved by the COG Board of Directors in 2023. As part of the Cooperative Forecasting Program process, member local governments may submit technical updates of their forecasts annually to COG. The COG Board will be asked to approve the latest minor update to the Cooperative Forecasts, Round 10.1, at its October 8, 2025 meeting. This memorandum provides documentation on the process to develop Round 10.1 as well as the updated forecasts.

COOPERATIVE FORECASTING PROCESS AND ROUND 10.0

The Cooperative Forecasting Program 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 forecasts of employment, population, and households by five-year increments, and 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. A primary use of these regional cooperative growth forecasts is the development of the region’s long range transportation plan by the Transportation Planning Board (TPB), which funds this activity. In addition, the forecasts are used by COG members to determine the demand for schools, parks, medical facilities, roads, stores, and services, and as the basis for calculating COG member dues. COG’s Cooperative Forecasting and Data Subcommittee members prepare the Forecasts working with TPB staff and with oversight by the Planning Directors Technical Advisory Committee.

The current Round 10.0 Cooperative Forecasts were approved by the COG Board in June 2023. This round considered the impact of the COVID-19 pandemic on utilization, density, and development of commercial office space and housing in the region. Typically, the Cooperative Forecasts undergo a “major” update approximately every five years on average and take into consideration available new baseline data such as Census data, regionally-significant planning and development decisions,

economic market developments, and national and international macroeconomic assumptions that may affect future growth in metropolitan Washington.

ROUND 10.1 UPDATE TO THE COOPERATIVE FORECASTS

Each year, the Cooperative Forecasting program provides an opportunity – but not a requirement – for jurisdictions to update their Forecasts on an annual basis. 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; and
- Changes to local labor and employment markets.

In 2024, the year following approval of Round 10.0 Cooperative Forecasts, in response to staff’s solicitation, several jurisdictions indicated a need to provide updates, prompting the development of the Round 10.1 Cooperative Forecasts (See Table 1).

Given the timing of this minor update and the evolving nature of policies and actions, it is important to note that actions of the current federal Administration, including reductions in the federal government workforce, are not included in this minor update. Such actions would be considered in the development of the next major round of Cooperative Forecasts.

Table 1: 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 FINDINGS

Table 2 below summarizes the updated forecasts of growth in employment, population and households for the COG region between 2025 and 2050. Under the Draft 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

Table 2: Summary of Draft 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

Table 3 and Table 4 show the absolute and percent difference, respectively, between the Draft Round 10.1 Cooperative Forecasts and the Round 10.0 Cooperative Forecasts and provide an indication of the “de minimis” nature of this update.

Table 3: 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

Table 4: 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%

JURISDICTIONAL LEVEL FINDINGS

Employment

Consistent with the Round 10.0 Cooperative Forecasts, the District of Columbia, Fairfax County, and Montgomery County will add the greatest number of new jobs to the region's employment base during the 2025 to 2050 forecast period.

Population

Like the Round 10.0 Cooperative Forecasts, most of the population growth will occur in Prince George's County, Fairfax County and Montgomery County.

Households

The largest number of new households in terms of growth will be in the District of Columbia, Fairfax County, and Montgomery County.

NEXT STEPS

Later this year, a Growth Trends report will be released providing more information and detail about the Round 10.1 Cooperative Forecasts. The report will include data tables and maps providing insights on existing and future growth of employment, population, and households anticipated in the region. Also, the updated forecasts will be available for all the Regional Activity Centers approved by the COG Board earlier this year.

Summary of Employment Forecasts
Final Round 10.1 Cooperative Forecasts
(Thousands)

Final COG Board of
Directors
October 8, 2025

JURISDICTION	2020	2025	2030	2035	2040	2045	2050	2020 to 2050 Growth	
								Number	% Change
District of Columbia	785.9	846.1	886.3	923.5	954.4	989.0	1,021.6	235.7	30.0%
Arlington County	221.6	220.5	233.6	250.6	257.4	261.8	266.1	44.5	20.1%
City of Alexandria	101.8	97.2	101.7	104.0	110.4	114.9	119.1	17.3	17.0%
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%
Montgomery County	493.6	522.9	545.6	568.3	591.0	613.8	636.5	142.9	29.0%
City of Rockville (1)	76.4	78.7	81.1	83.8	87.8	91.1	94.5	18.0	23.6%
City of Gaithersburg (1)	43.0	48.0	52.0	54.5	56.5	58.0	59.0	16.0	37.2%
Prince George's County	343.5	357.6	375.2	394.2	410.5	429.8	448.7	105.2	30.6%
Fairfax County (2)	658.8	690.5	750.8	788.8	812.5	832.0	842.0	183.2	27.8%
City of Fairfax	20.5	22.0	22.3	22.6	22.9	23.2	23.5	3.0	14.6%
City of Falls Church	12.4	13.1	15.4	16.5	17.4	18.3	19.4	7.1	57.0%
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%
Loudoun County	187.7	221.7	237.1	249.1	260.4	269.4	277.2	89.5	47.7%
Prince William County	161.8	172.2	194.3	209.8	223.4	235.6	246.4	84.6	52.3%
City of Manassas	25.3	26.1	26.9	27.7	28.3	28.8	29.3	3.9	15.5%
City of Manassas Park	4.3	4.7	5.0	5.1	5.2	5.3	5.4	1.1	25.5%
Charles County	43.9	46.1	49.8	54.0	57.4	60.0	62.2	18.3	41.8%
Frederick County	108.3	115.6	123.8	132.5	141.8	151.8	162.5	54.2	50.1%
City of Frederick (3)	57.4	60.1	64.4	67.6	69.5	74.4	79.6	22.2	38.7%
Outer Suburbs	531.4	586.4	636.8	678.2	716.5	750.9	783.0	251.6	47.4%
Virginia Jurisdictions	1,394.3	1,468.1	1,587.0	1,674.1	1,737.9	1,789.2	1,828.5	434.2	31.1%
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%
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%

(1) Included in Montgomery County total.

(2) Forecasts for all years include Fairfax County Government employees working at the Fairfax County Judicial Center.

(3) Included in Frederick County total.

Summary of Population Forecasts
Final Round 10.1 Cooperative Forecasts
(Thousands)

Final COG Board of
Directors
October 8, 2025

JURISDICTION	2020	2025	2030	2035	2040	2045	2050	2020 to 2050 Growth	
								Number	% Change
District of Columbia	689.5	697.6	728.6	757.2	787.1	816.4	844.4	154.9	22.5%
Arlington County	238.4	247.4	258.8	269.8	283.1	295.4	308.5	70.2	29.4%
City of Alexandria	159.5	168.6	182.7	197.5	211.5	227.2	235.5	76.1	47.7%
Central Jurisdictions	1,087.4	1,113.6	1,170.1	1,224.5	1,281.7	1,339.1	1,388.5	301.1	27.7%
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%
City of Rockville (1)	67.2	69.9	73.9	77.6	81.9	86.1	90.4	23.2	34.5%
City of Gaithersburg (1)	69.7	72.5	75.7	78.5	81.2	83.7	85.8	16.1	23.2%
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%
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%
City of Fairfax	24.1	27.8	32.7	34.4	36.1	37.8	39.6	15.4	63.8%
City of Falls Church	14.7	15.5	18.0	19.6	20.7	21.8	23.3	8.6	58.8%
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%
Loudoun County	421.0	455.2	484.4	506.9	522.6	533.8	543.7	122.7	29.2%
Prince William County	480.6	503.5	536.6	553.0	565.0	573.6	579.5	98.9	20.6%
City of Manassas	42.8	43.7	46.3	47.6	48.5	49.5	50.4	7.7	17.9%
City of Manassas Park	17.2	19.0	20.4	20.9	21.4	21.9	22.4	5.2	30.3%
Charles County	168.0	176.3	193.6	203.8	216.5	230.4	242.7	74.6	44.4%
Frederick County	271.7	293.2	316.3	341.3	368.3	397.4	428.8	157.1	57.8%
City of Frederick (2)	78.2	83.8	89.5	95.1	100.8	106.4	112.0	33.9	43.3%
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%
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%
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%
COG Region	5,727.709	5,934.780	6,225.138	6,489.511	6,728.638	6,956.769	7,167.828	1,440.1	25.1%

(1) Included in Montgomery County total.

(2) Included in Frederick County total.

Summary of Household Forecasts
Final Round 10.1 Cooperative Forecasts
(Thousands)

Final COG Board of
Directors
October 8, 2025

JURISDICTION	2020	2025	2030	2035	2040	2045	2050	2020 to 2050 Growth	
								Number	% Change
District of Columbia	312.4	344.2	366.8	386.6	407.6	426.0	441.4	129.0	41.3%
Arlington County	109.7	120.7	127.1	133.7	141.1	147.9	155.4	45.7	41.6%
City of Alexandria	75.6	81.8	91.5	101.7	111.3	122.1	127.8	52.2	69.1%
Central Jurisdictions	497.7	546.7	585.4	622.0	659.9	696.1	724.6	226.9	45.6%
Montgomery County	386.6	398.4	416.5	434.2	450.1	463.2	474.3	87.7	22.7%
City of Rockville (1)	26.9	28.1	30.0	31.7	33.6	35.7	37.8	11.0	40.8%
City of Gaithersburg (1)	25.9	27.2	28.9	30.3	31.7	33.0	34.2	8.3	32.0%
Prince George's County	342.2	355.7	373.5	395.2	409.8	423.0	435.2	93.0	27.2%
Fairfax County	417.5	429.5	446.1	461.8	476.6	491.8	506.8	89.4	21.4%
City of Fairfax	9.3	10.6	13.0	13.8	14.6	15.4	16.3	6.9	74.3%
City of Falls Church	5.8	7.3	8.7	9.6	10.3	11.1	12.1	6.3	108.5%
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%
Loudoun County	137.5	148.2	158.7	166.9	172.8	177.2	181.0	43.5	31.6%
Prince William County	153.9	158.1	173.4	180.0	185.1	189.0	191.9	37.9	24.6%
City of Manassas	14.0	14.3	15.1	15.5	15.8	16.1	16.4	2.4	17.5%
City of Manassas Park	5.4	6.2	6.9	7.1	7.4	7.7	8.0	2.6	47.9%
Charles County	59.1	64.3	71.2	75.3	80.0	85.2	89.7	30.6	51.8%
Frederick County	98.4	106.2	114.5	123.5	133.2	144.3	155.7	57.3	58.3%
City of Frederick (2)	31.8	34.1	36.3	38.7	40.9	43.3	45.6	13.8	43.3%
Outer Suburbs	468.3	497.2	539.9	568.3	594.3	619.4	642.6	174.4	37.2%
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%
Maryland Jurisdictions	886.3	924.6	975.7	1,028.2	1,073.1	1,115.6	1,154.9	268.6	30.3%
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%

(1) Included in Montgomery County total.

(2) Included in Frederick County total.