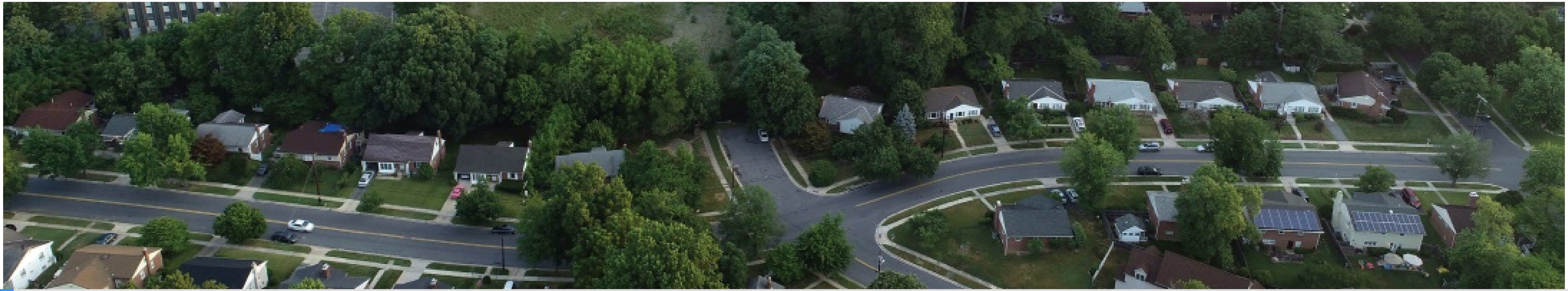
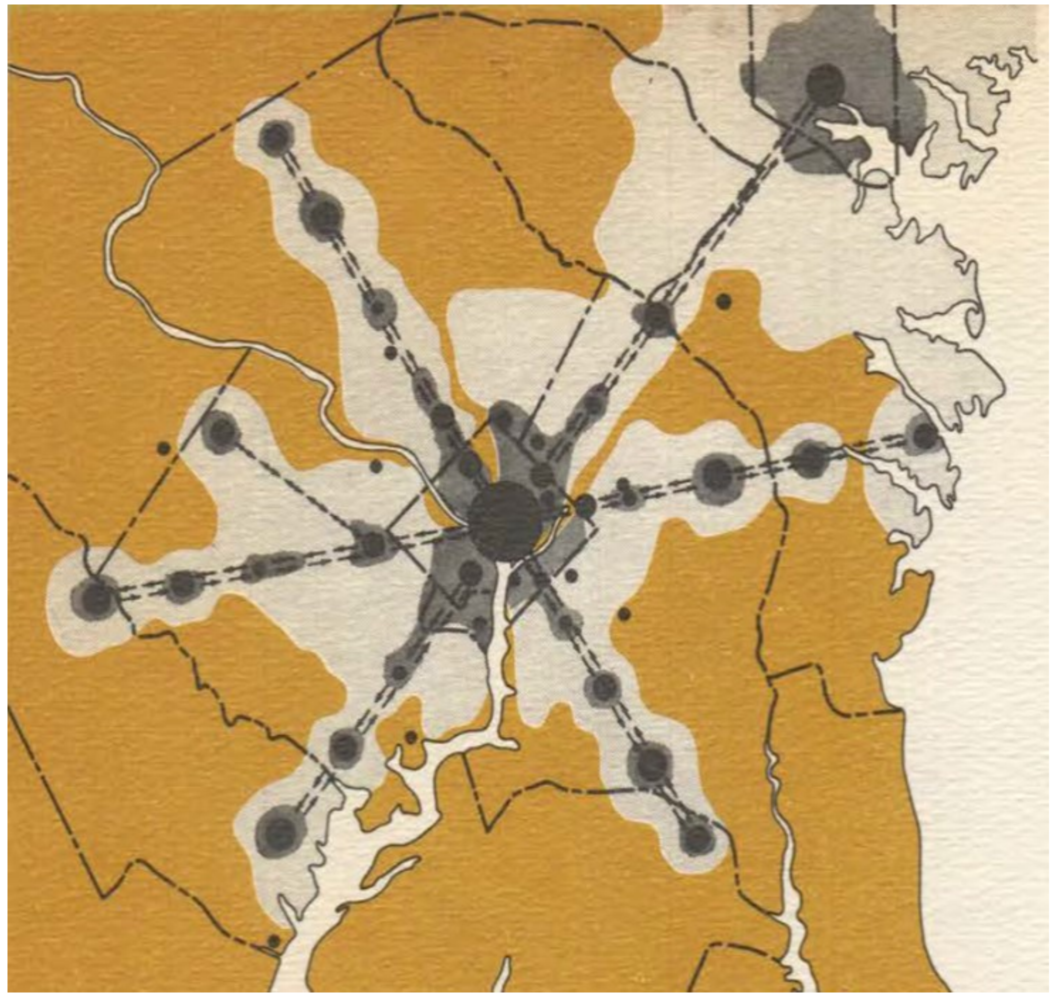


RESEARCH + SPECIAL PROJECTS
A DIVISION OF THE MONTGOMERY COUNTY PLANNING DEPARTMENT

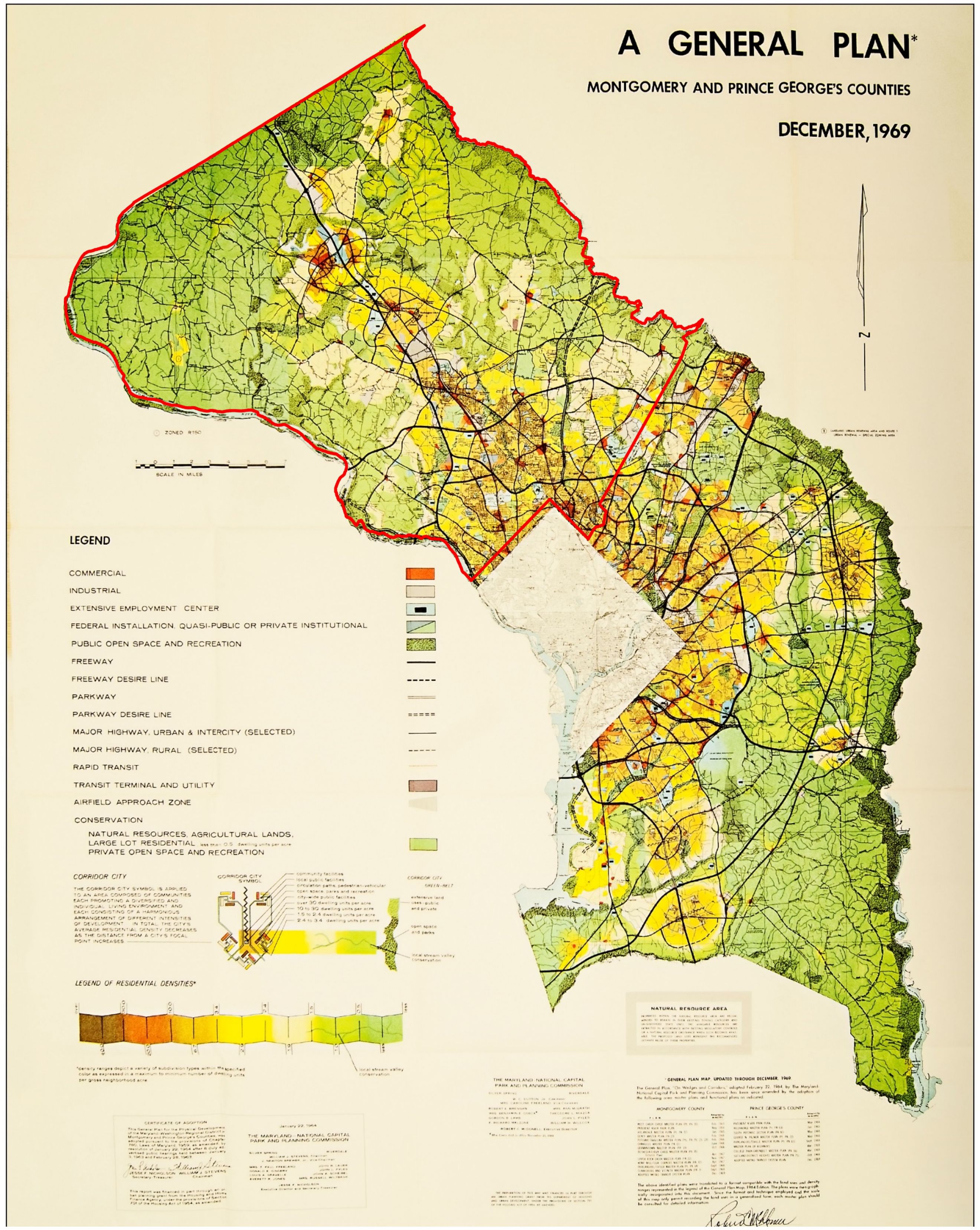
Montgomery County Trends:
A Look at People, Housing and Jobs Since 1990

Presentation to Gaithersburg-Germantown Chamber
March 20, 2019

1964 General Plan "…on Wedges and Corridors"



1969 General Plan and its Implementation



Increase Affordable Housing → MPDU Law

Protect Farmland → TDRs

Guide Timely Infrastructure → APFO

Why Update the General Plan?

- The last comprehensive update was in **1969**
- The county changed from a **bedroom community** to a **major employment center** with a **diverse population** of more than 1 million people
- We are entering another era of **disruptive technologies** and **cultural shifts**
- Now is the time to step back and create a **visionary plan** for the next 30 years

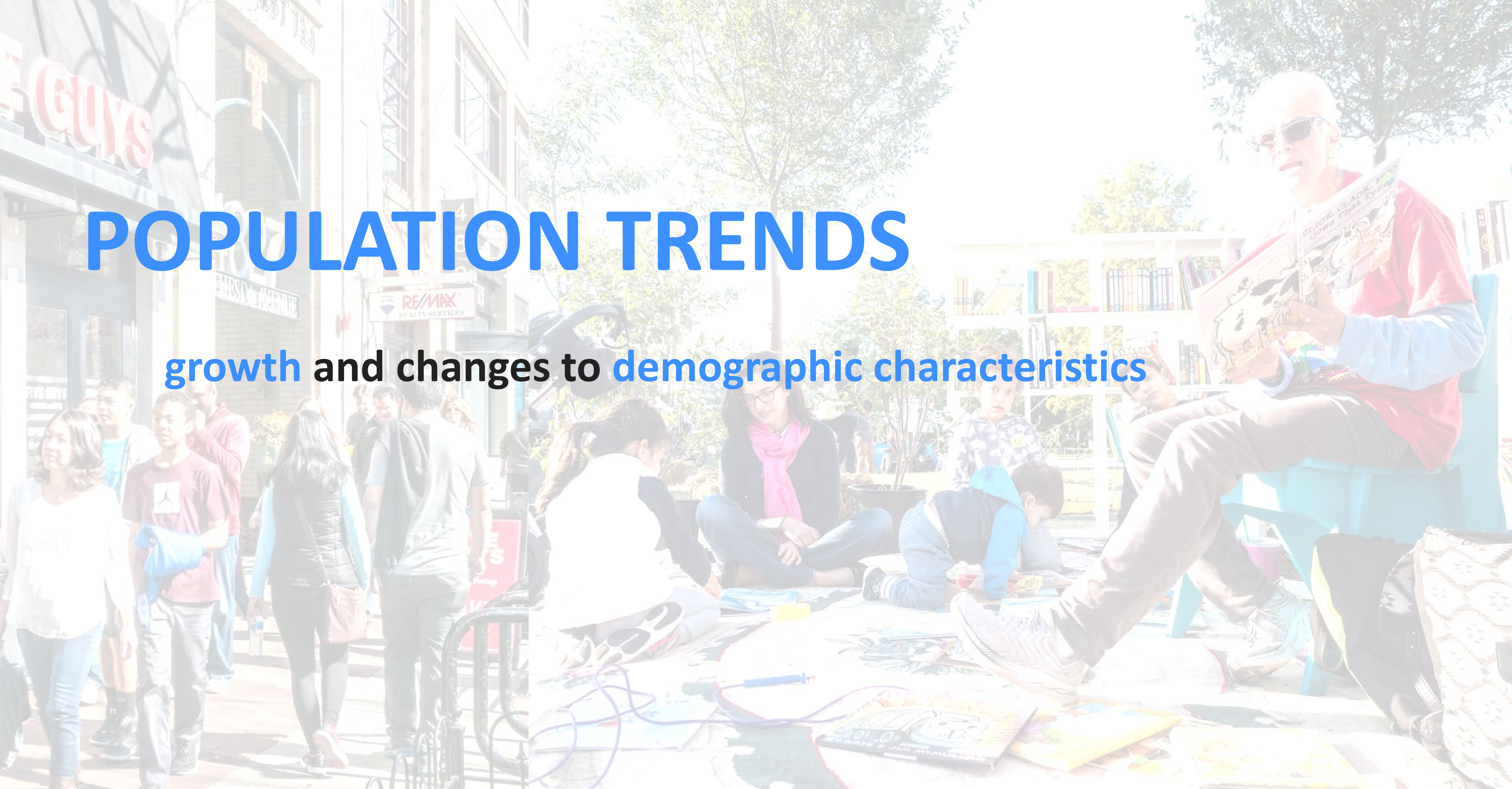
Change is an Opportunity to **THRIVE**

- Demographics shifts
- Digital transformation of everything
- Climate change
- Preference for walkable spaces
- Sharing economy
- Autonomous vehicles

Goals of the Trends Report

- Provide context for the General Plan update by looking at existing conditions of population, housing and employment

- Answer the question: “What has changed since the 1993 General Plan refinement?”



POPULATION TRENDS

growth and changes to demographic characteristics

Most populous county in Maryland

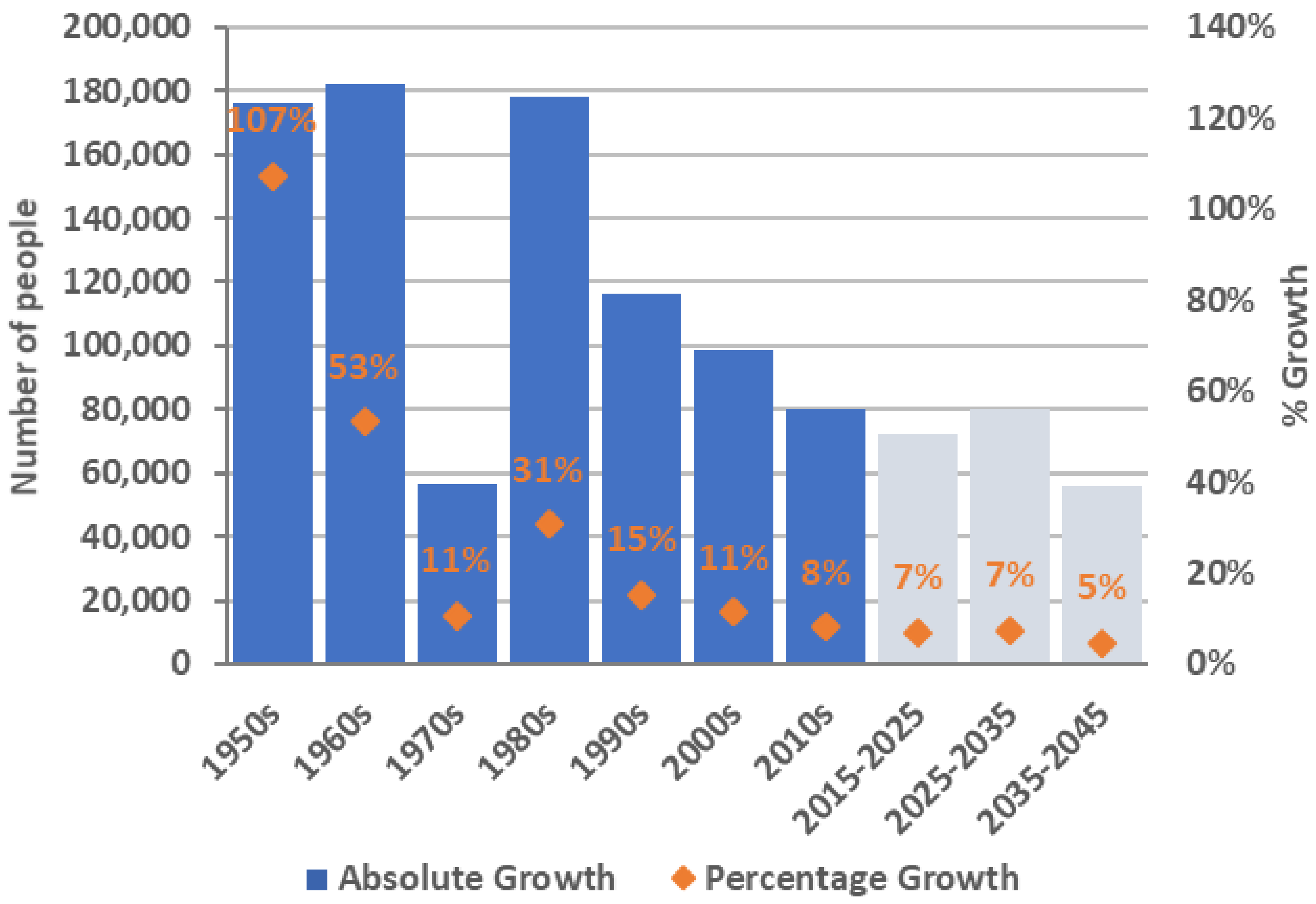
Million-plus population since 2012

2017: 1,058,800

1990: 765,500 **+293,300**

38% population increase since 1990

Decreasing gain and rate of growth since 1990



Natural increase and migration are sources of growth & diversity

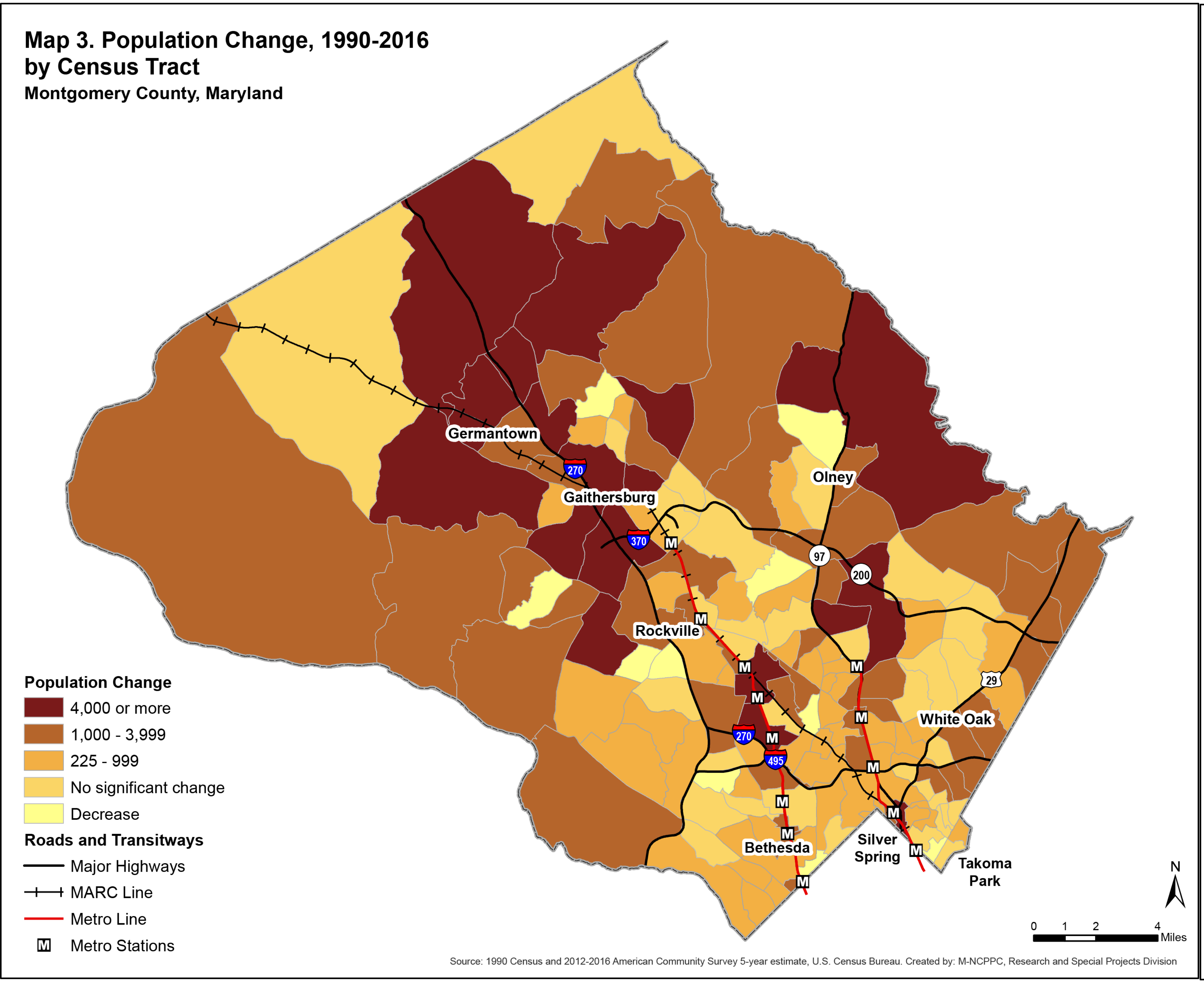
Births drive population growth & diversity

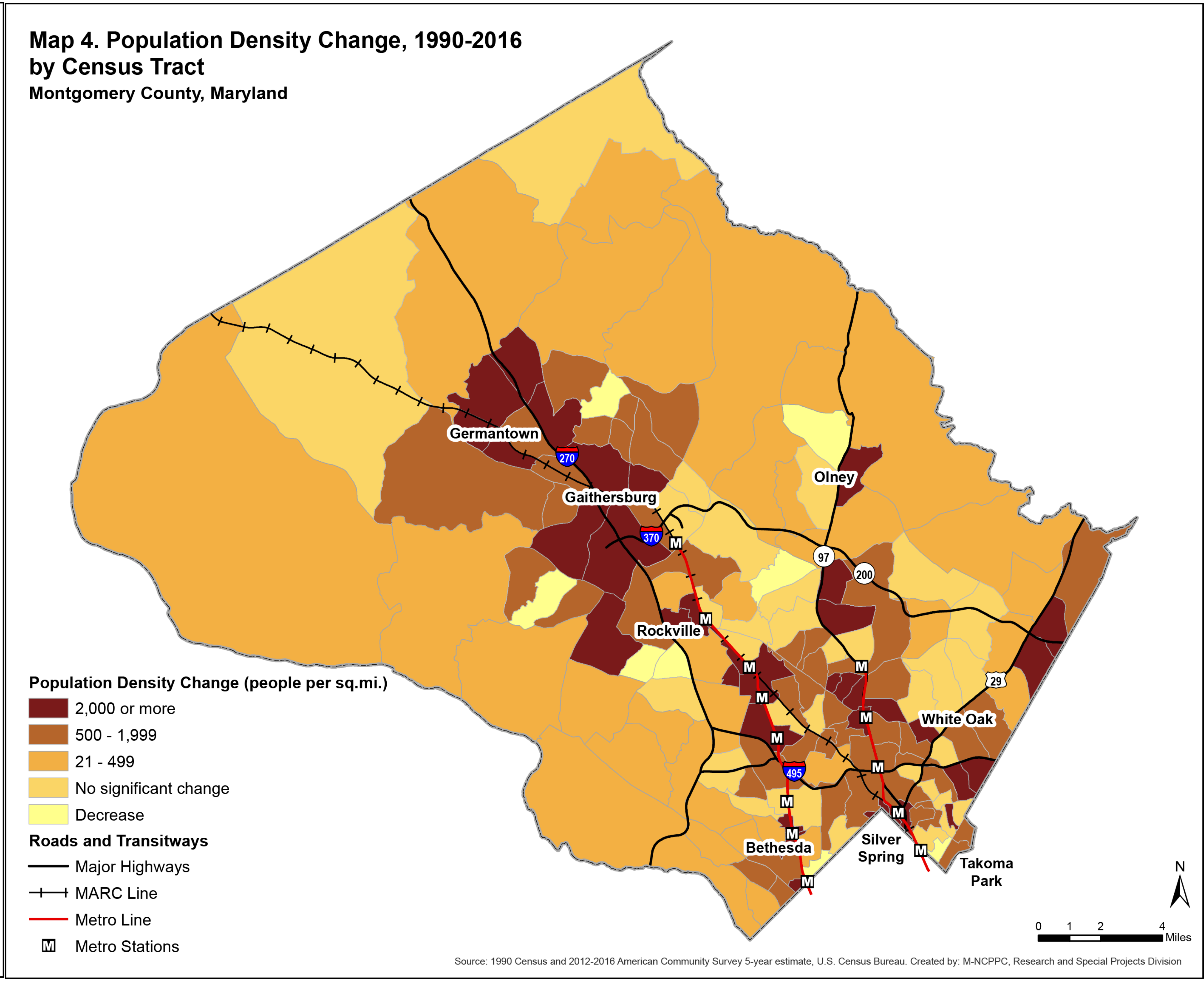
Births	+12,930
Deaths	-5,330
Average Annual	**+7,900**
Net Change since 1990	***+205,400***

International migration offsets typically net domestic out-migration

Domestic Migration	-5,400
International Migration	+8,730
Average Annual	**+3,330**
Net Change since 1990	***+90,000***

Location of population growth from 1990 to 2016

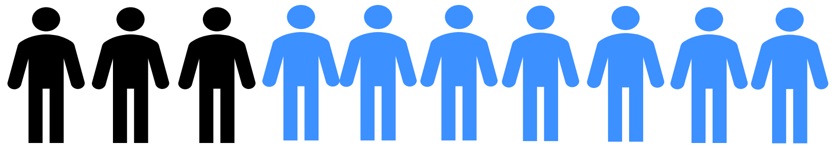




Immigration has contributed to significant diversity

Increasing foreign-born population

2016: 344,645

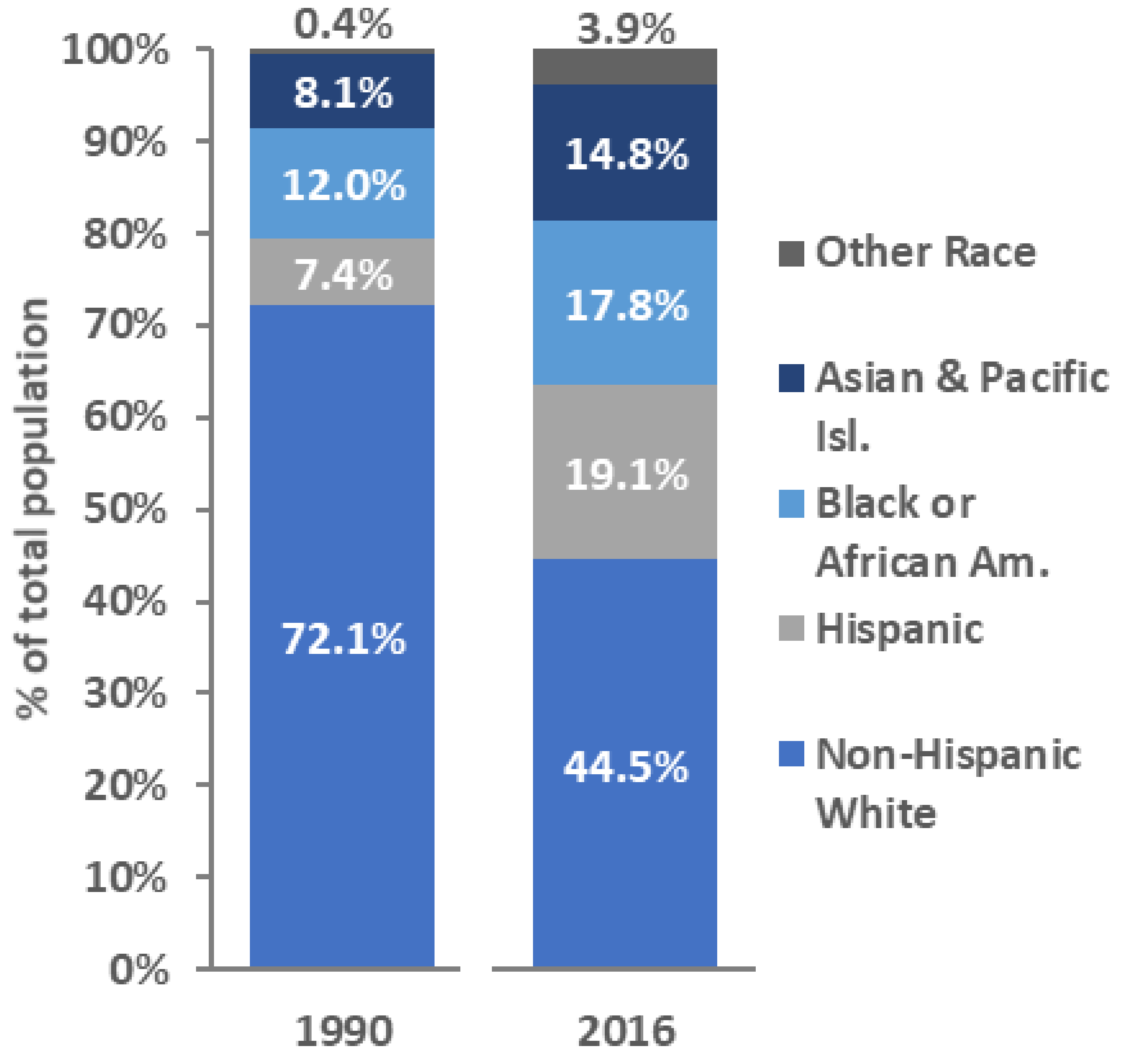


1990: 141,166 +293,300 (59%)

Up from 19% in 1990 to 33% in 2016

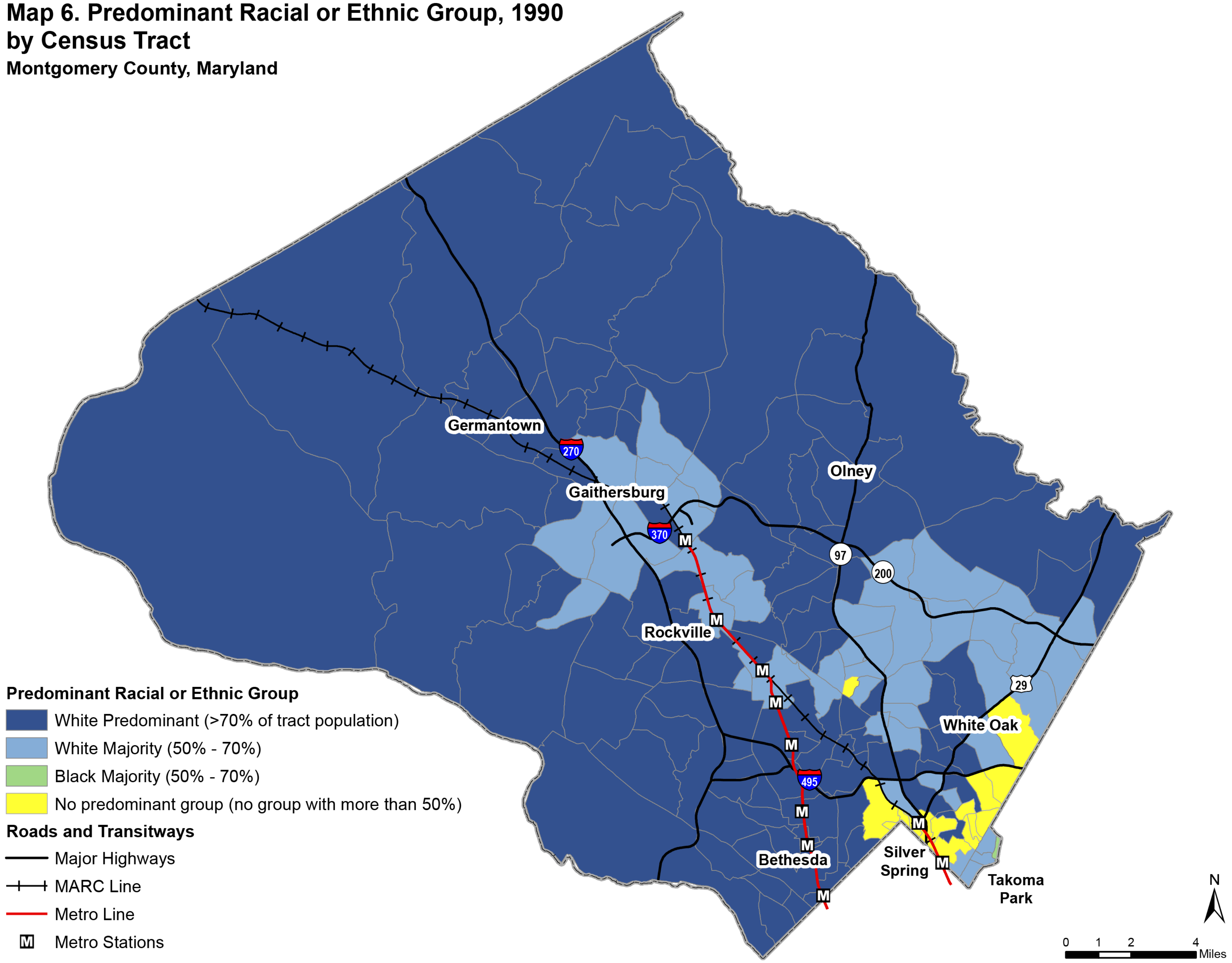
Majority from Latin America (37%) & Asia(37%)

Greater racial & ethnic diversity



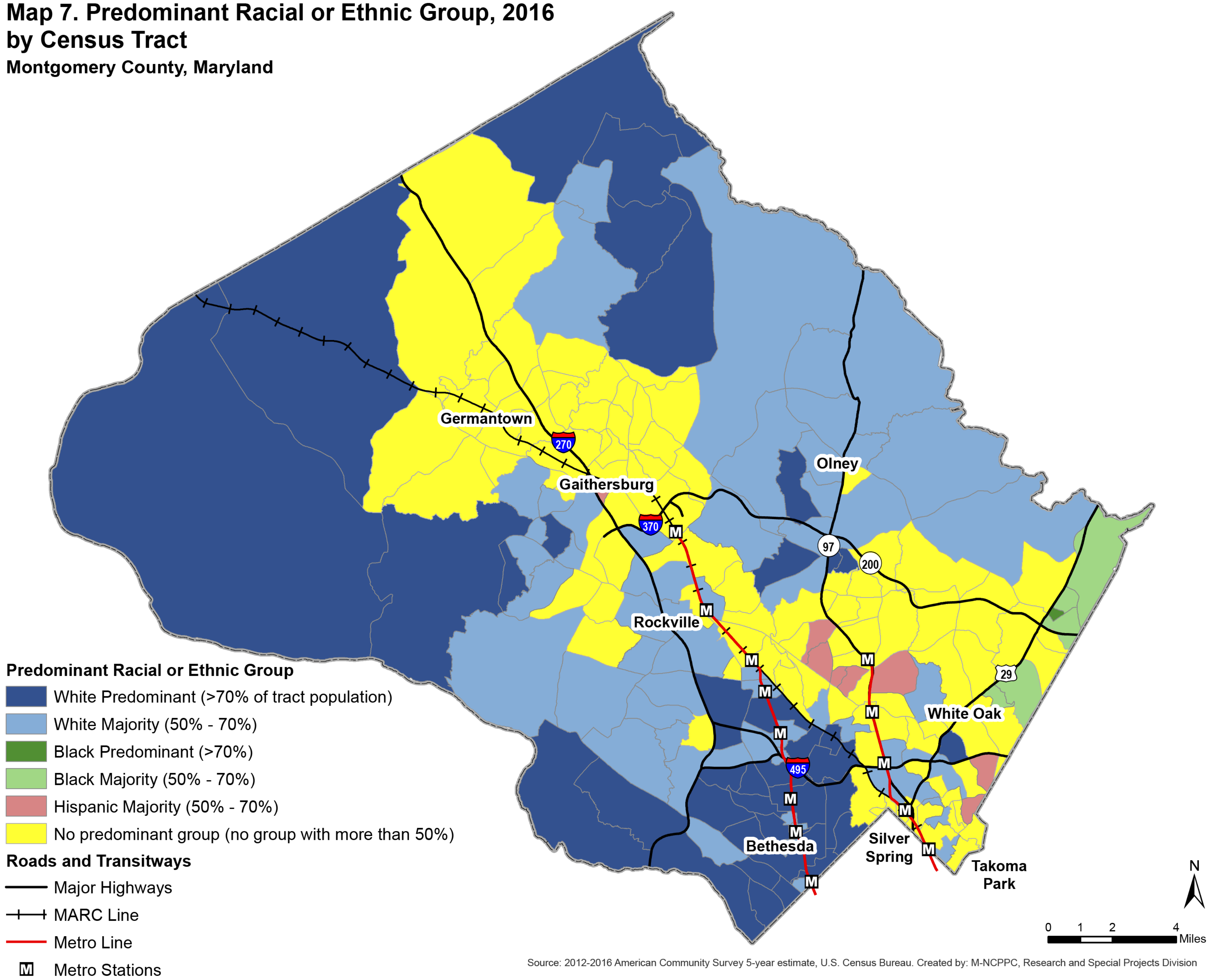
Racial and ethnic diversity is increasing across the county

Map 6. Predominant Racial or Ethnic Group, 1990 by Census Tract
Montgomery County, Maryland



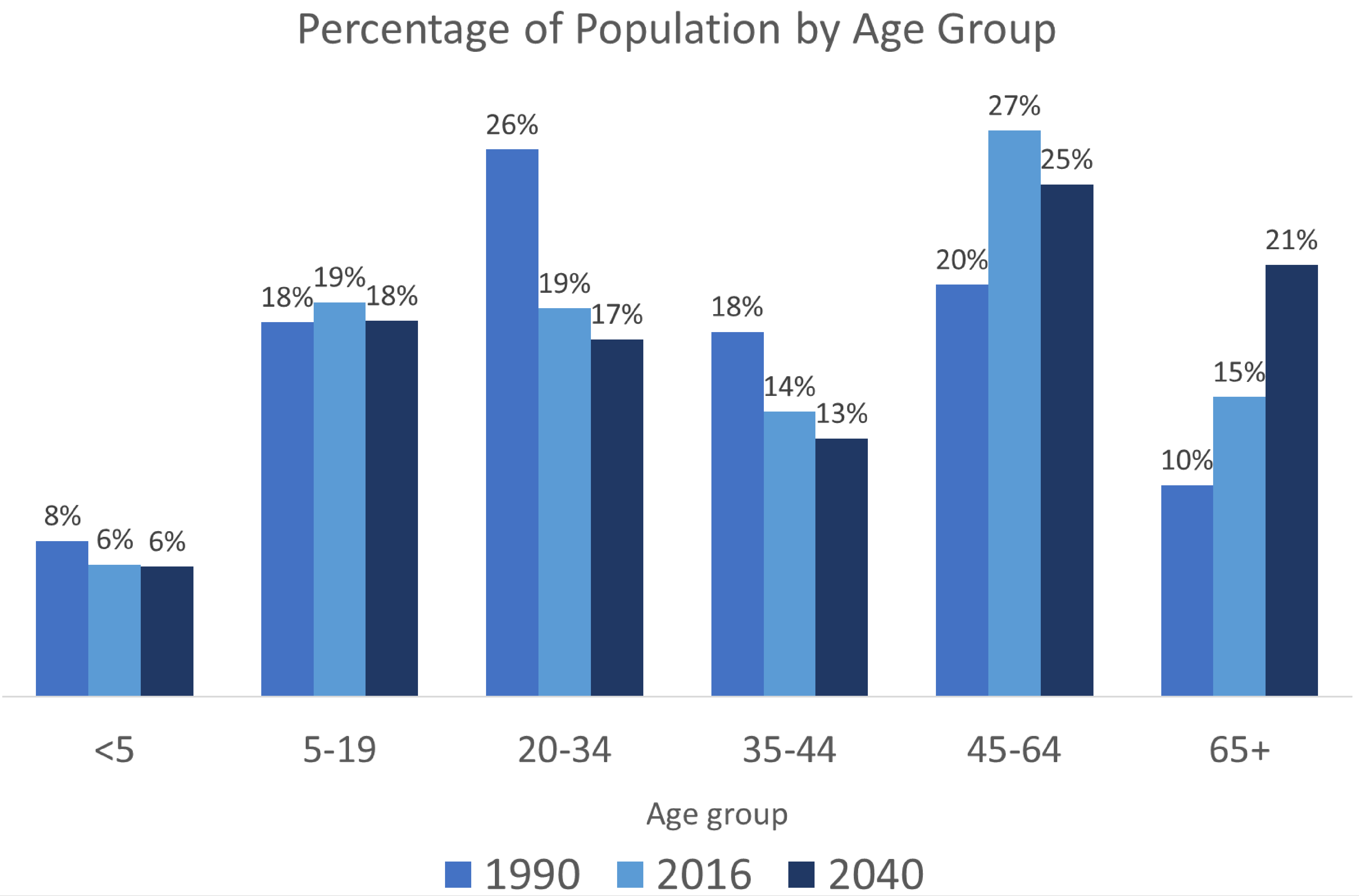
Source: 1990 Census, U.S. Census Bureau. Created by: M-NCPPC, Research and Special Projects Division

Map 7. Predominant Racial or Ethnic Group, 2016 by Census Tract
Montgomery County, Maryland



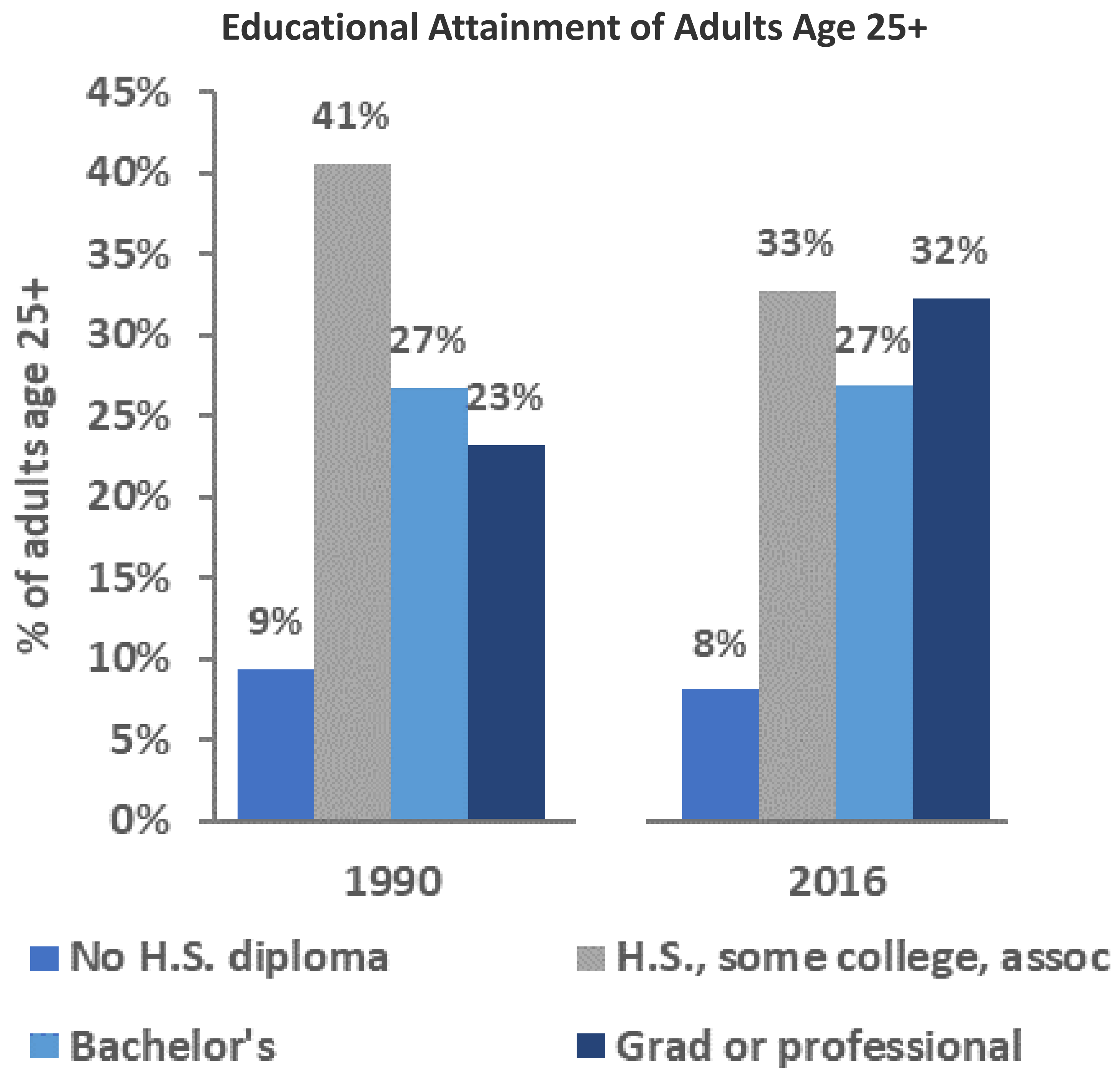
Source: 2012-2016 American Community Survey 5-year estimate, U.S. Census Bureau. Created by: M-NCPPC, Research and Special Projects Division

Increasingly older population



Increased median age from **33.9 years** in 1990 to **39 years** in 2016

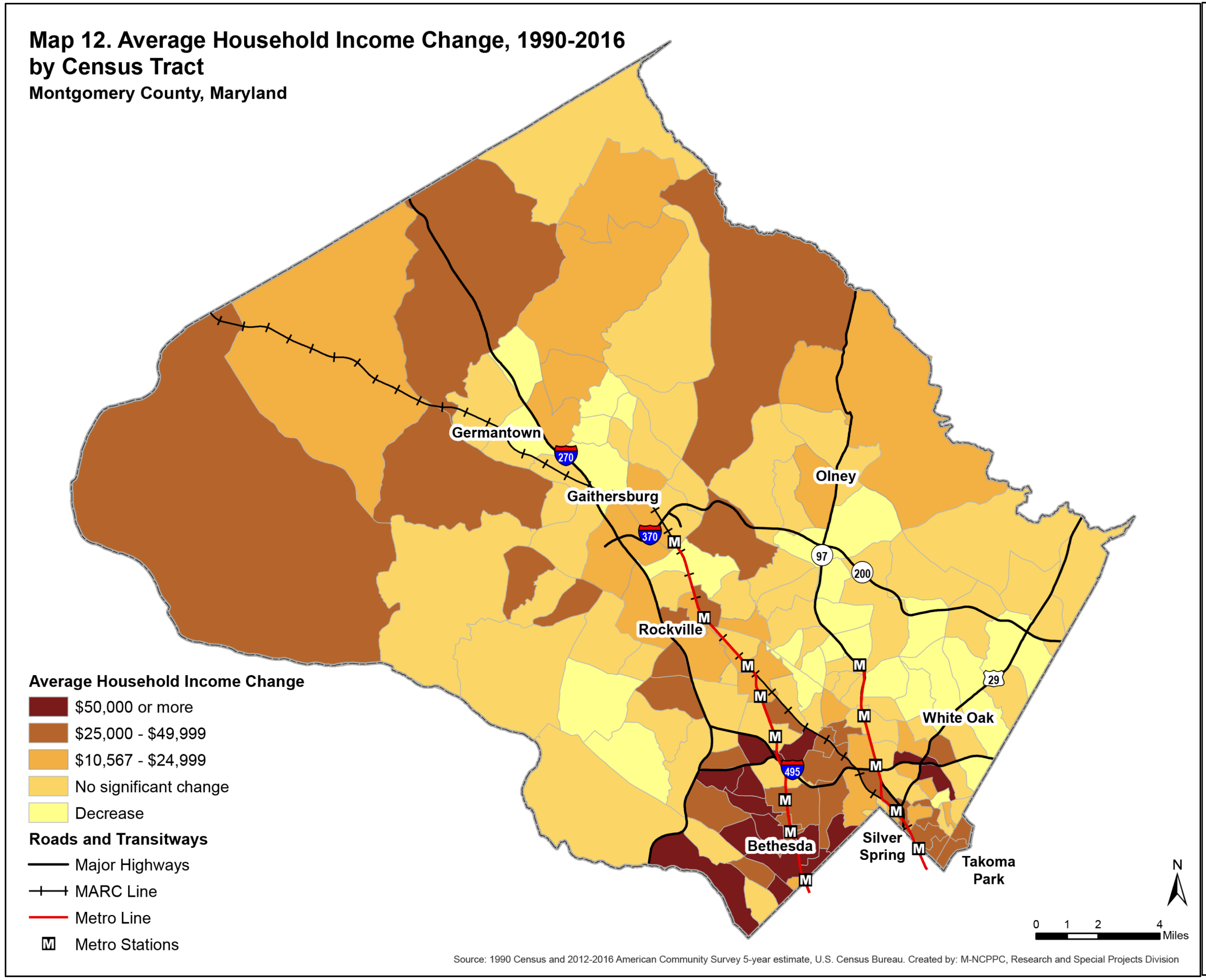
Gains in educational attainment

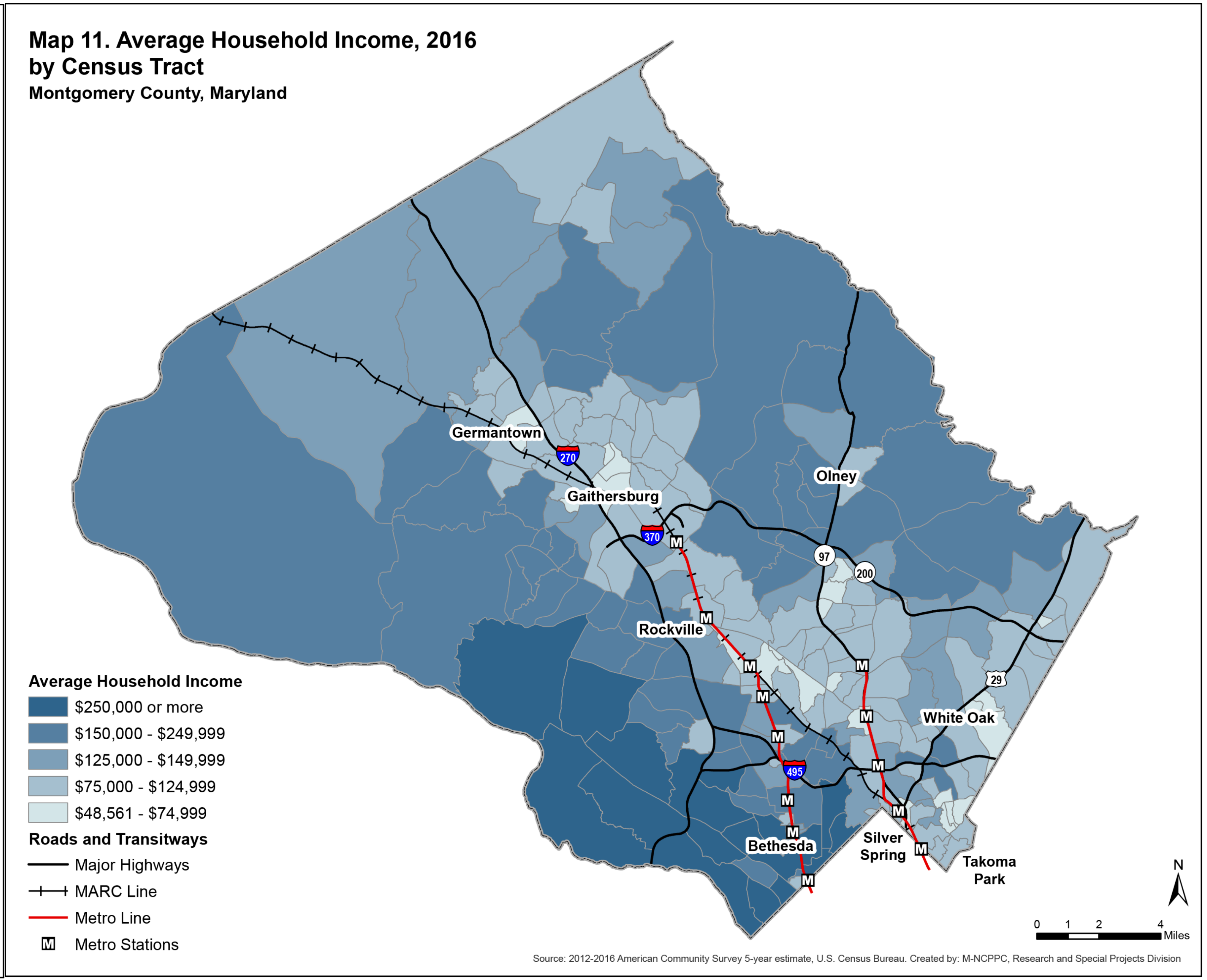


Highly educated adult residents:

- 59% have BA degrees compared to 50% in region
- Concentration of advanced degrees 5th in US
- High levels of educational attainment correlated with management, business and science jobs and high median income households

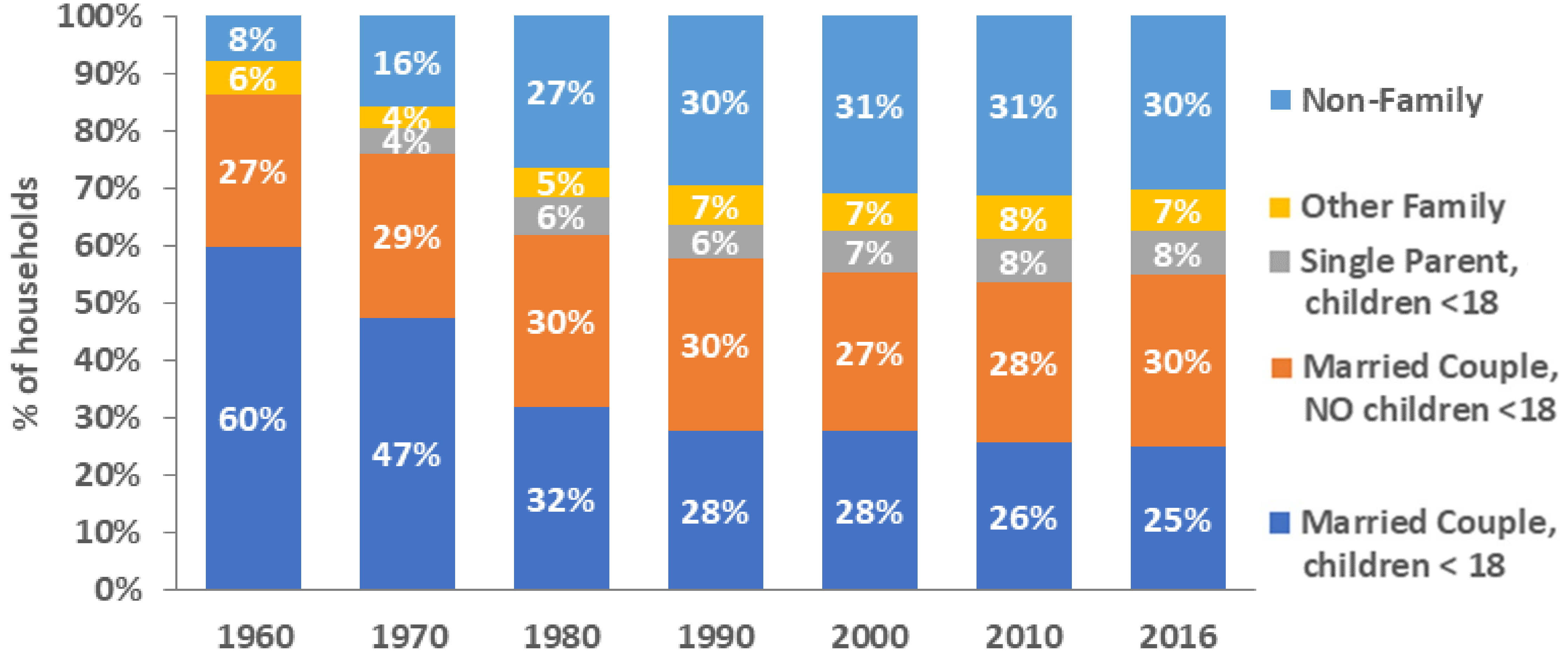
Change in household income from 1990 to 2016





Types of households stabilize after 1990

Wider variety of household types since 1960, but distribution relatively stable since 1990



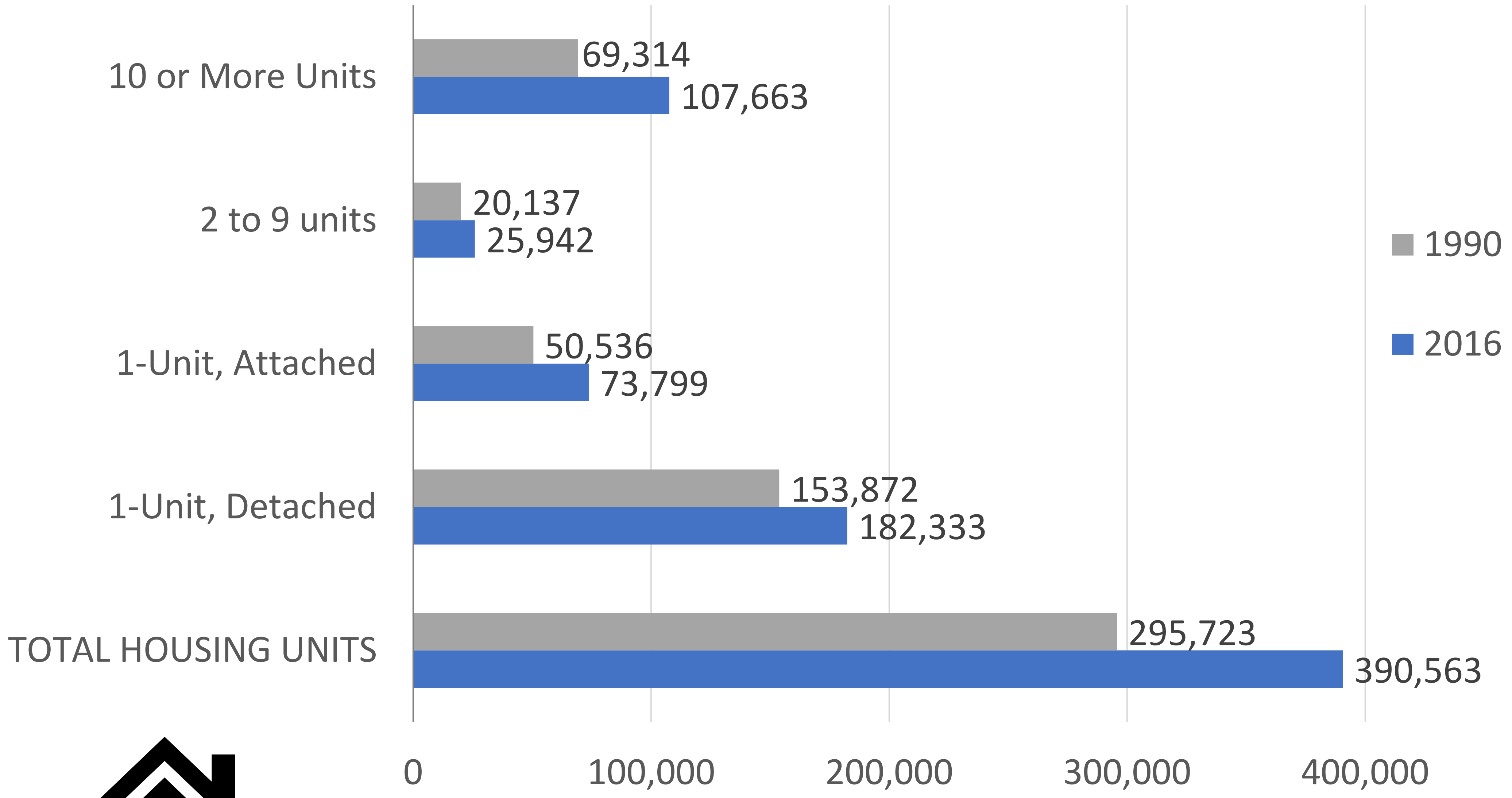
- **Non-family households are the most common household type since 2000**
- **Since 1990, married-couples with children < 18 are less common than:**
  - Married-couples with NO children < 18
  - Non-family households

HOUSING TRENDS

an evolving housing stock

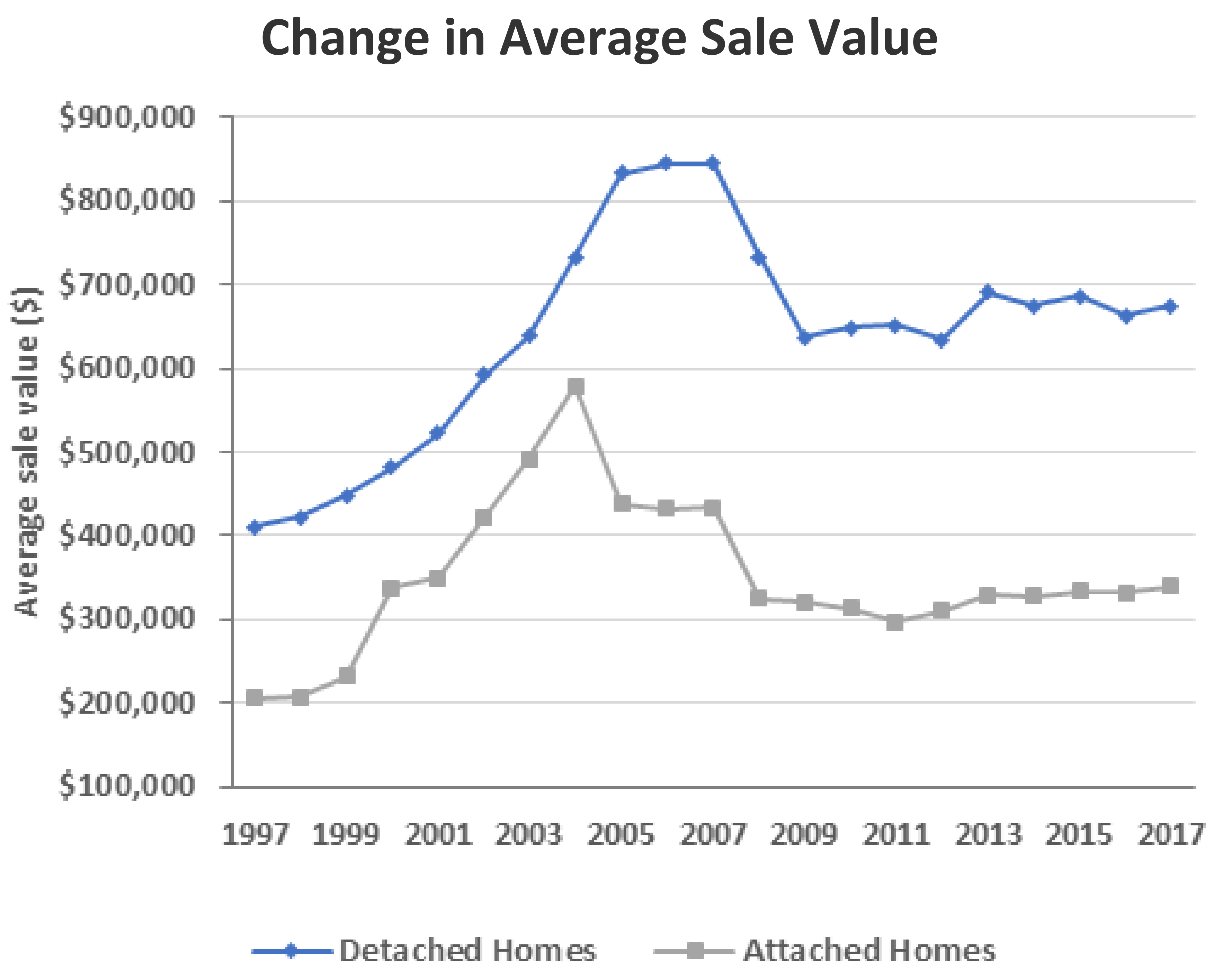
Growth of multifamily housing outpaced all other types

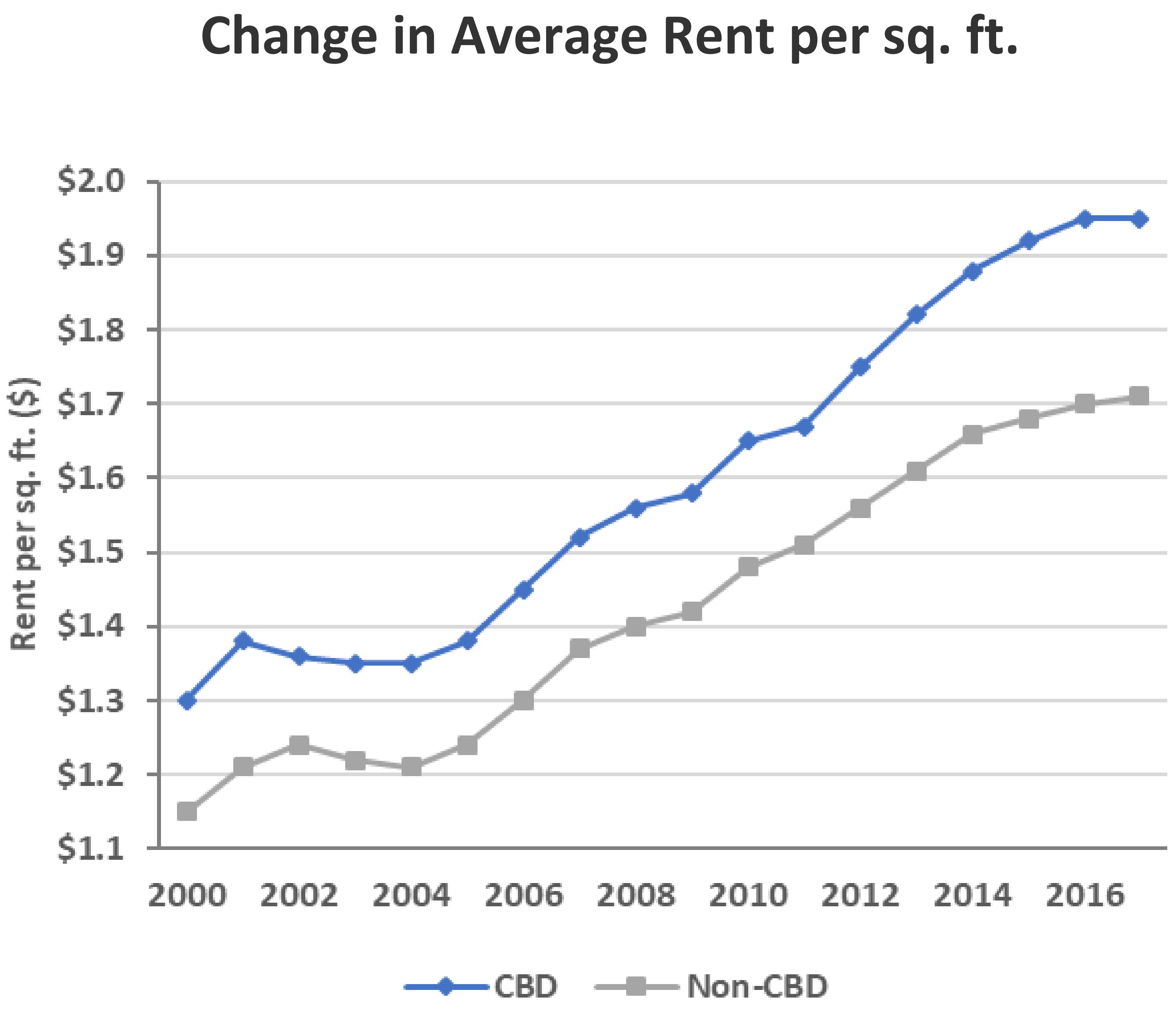
Number of housing units by type



- **32% increase** in the number of housing units from **295,723 to 390,563**
- **49% increase** in the number of multi-family units
- **25% increase** in the number of single family units

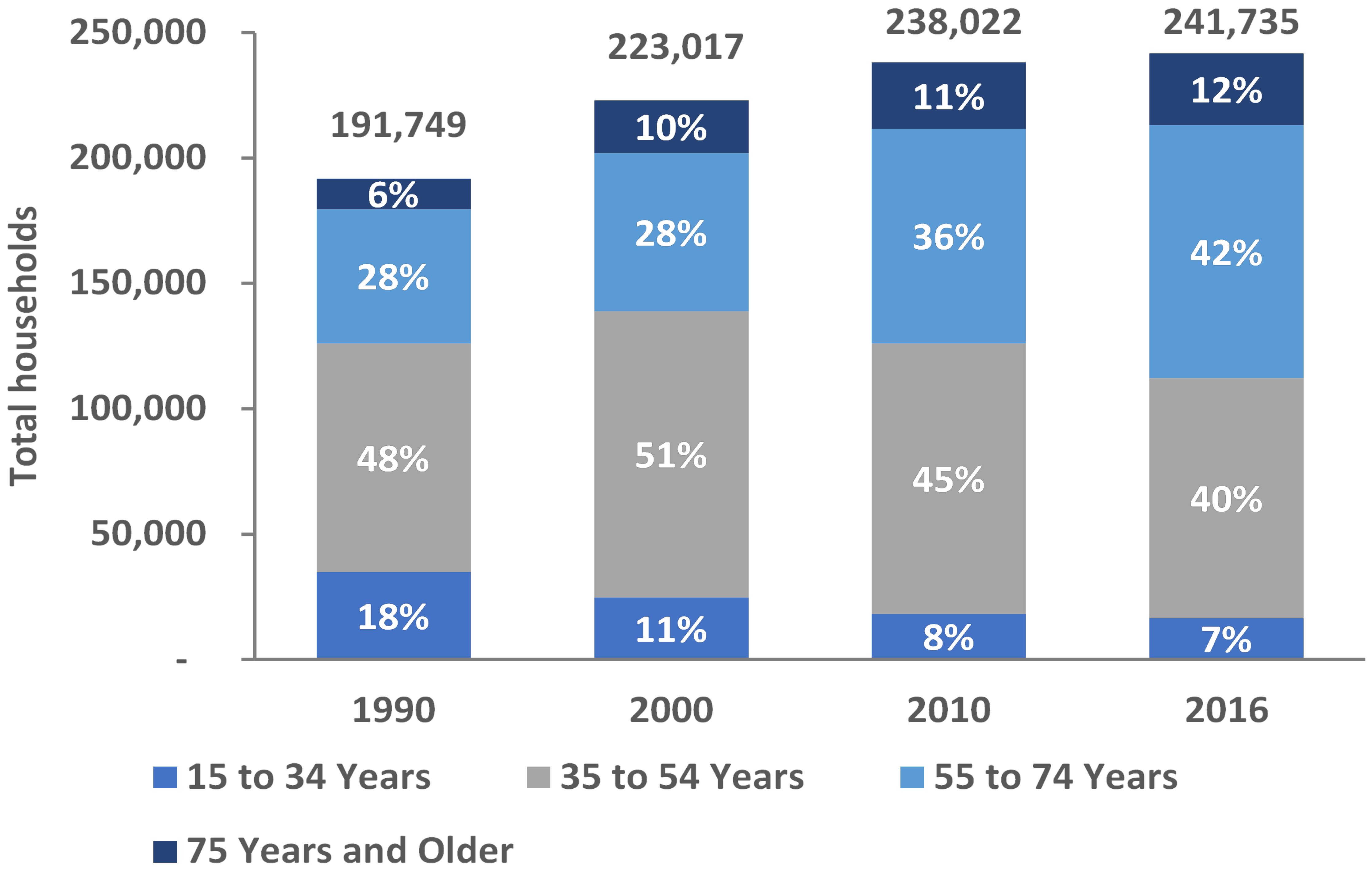
Increases in housing values (and costs) have outpaced inflation





Increase in the number of older homeowners and decrease in the number of younger homeowners

- **Increase in 55+ homeowners**
- **Decrease in younger homeowners**
- **Demand shifts:**
  - **Population changes**
  - **Affordability**
  - **Product diversity**



Source:1990-2010 Census, 2016 American Community Survey, 1-year estimate U.S. Census Bureau.

Conclusion and Next Steps

Implications for General Plan Update

- Increasing diversity
  - Population
  - Housing
- Aging demographics
- Incomes haven't kept up with costs
- Employment stable, but challenges remain
- Shift from new development to redevelopment

Process and Timeline

PRE-PLANNING	July '18– March 2019
SCOPE OF WORK	March – April 2019
VISIONING	May -- October 2019
ANALYSIS	June 2019 – March 2020
WORKING DRAFT	April – June 2020
PUBLIC HEARING DRAFT	July 2020
PUBLIC HEARING & WORK SESSIONS	Sept 2020 – June 2021
TRANSMITTAL TO COUNTY COUNCIL	July 2021

Questions?

THANK YOU!

Carrie McCarthy

Caroline.mccarthy@montgomeryplanning.org

301-495-4506

Appendix

EMPLOYMENT TRENDS

people who live here & people who work here

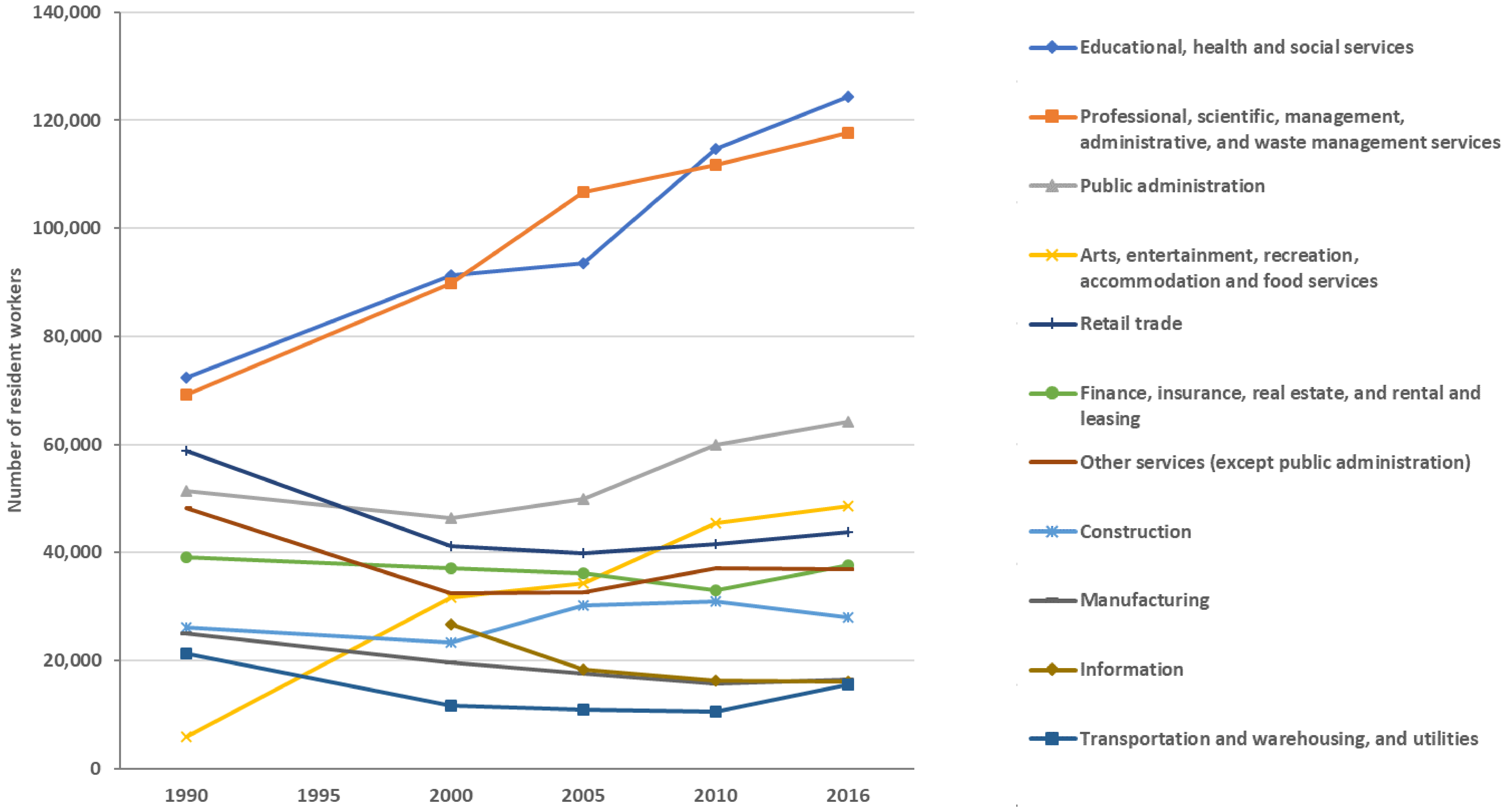
A large workforce **lives** here

- Nearly **600,000** in 2016 – **2nd largest regionally**
- Workforce **grew 31%** since 1990
- Most (**60%**) work in the county
- **Aging residents** remain in the workforce

Sizes of job sectors remained stable

- Private sector: 68-73%
- Federal government: 13-15%
- State/local government: 8%
- Self-employed: 6-7%

Two top industries employ 40% of residents



Commuters are still primarily drivers

- 65% drive to work alone (↓ 3 points)
- 16% take public transit (↑ 3 points)
- Commutes are 35 min on average (↑ 6 min)

More than 460,000 jobs are located **in the county**

The sizes of the sectors have remained stable over time

81% Private sector

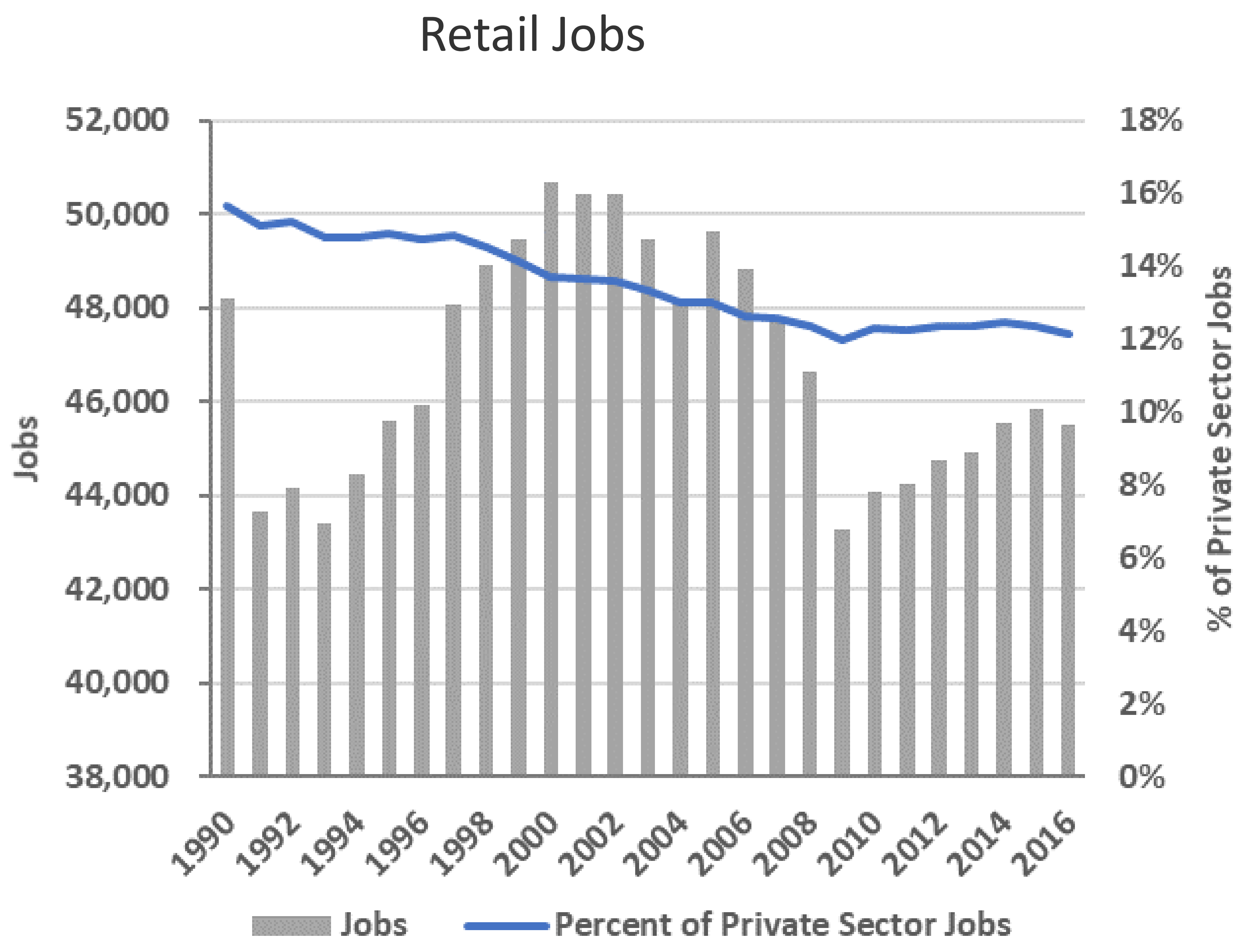
10% Federal government

9% Local government

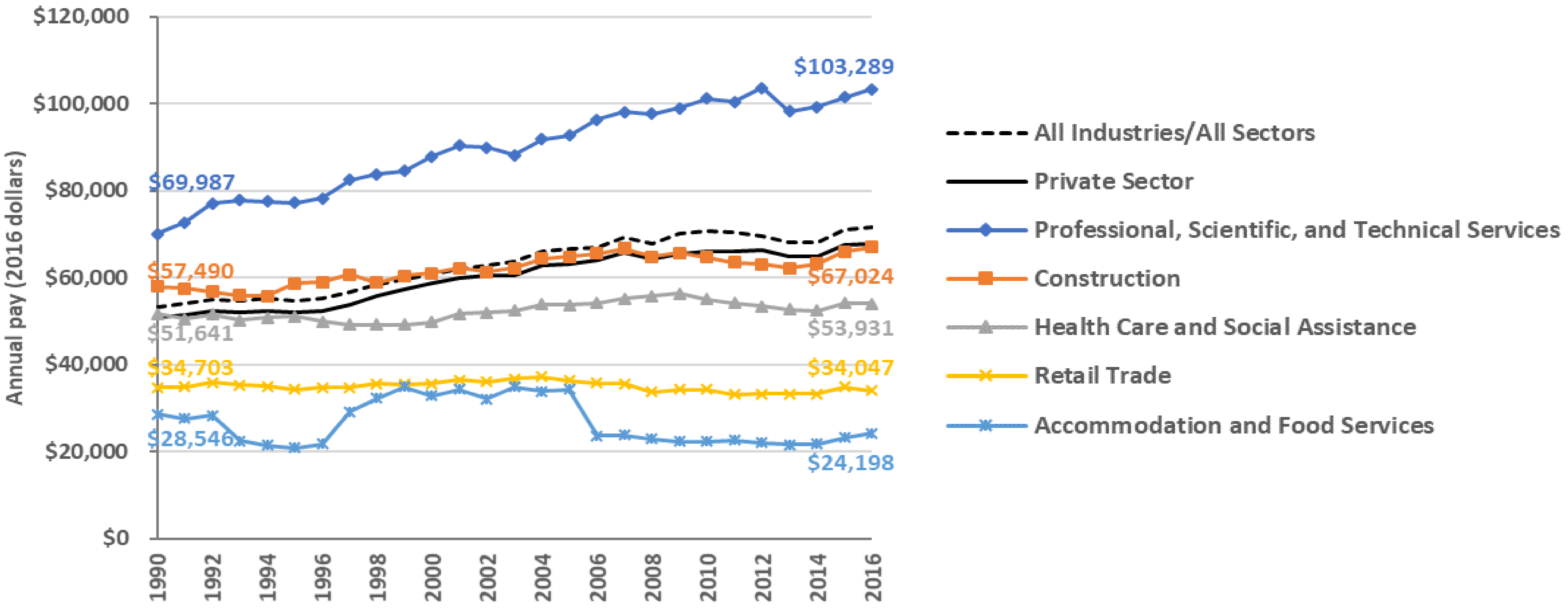
Professional, scientific and technical services is the largest at 65,000

Health care and social assistance grew the fastest at 111%

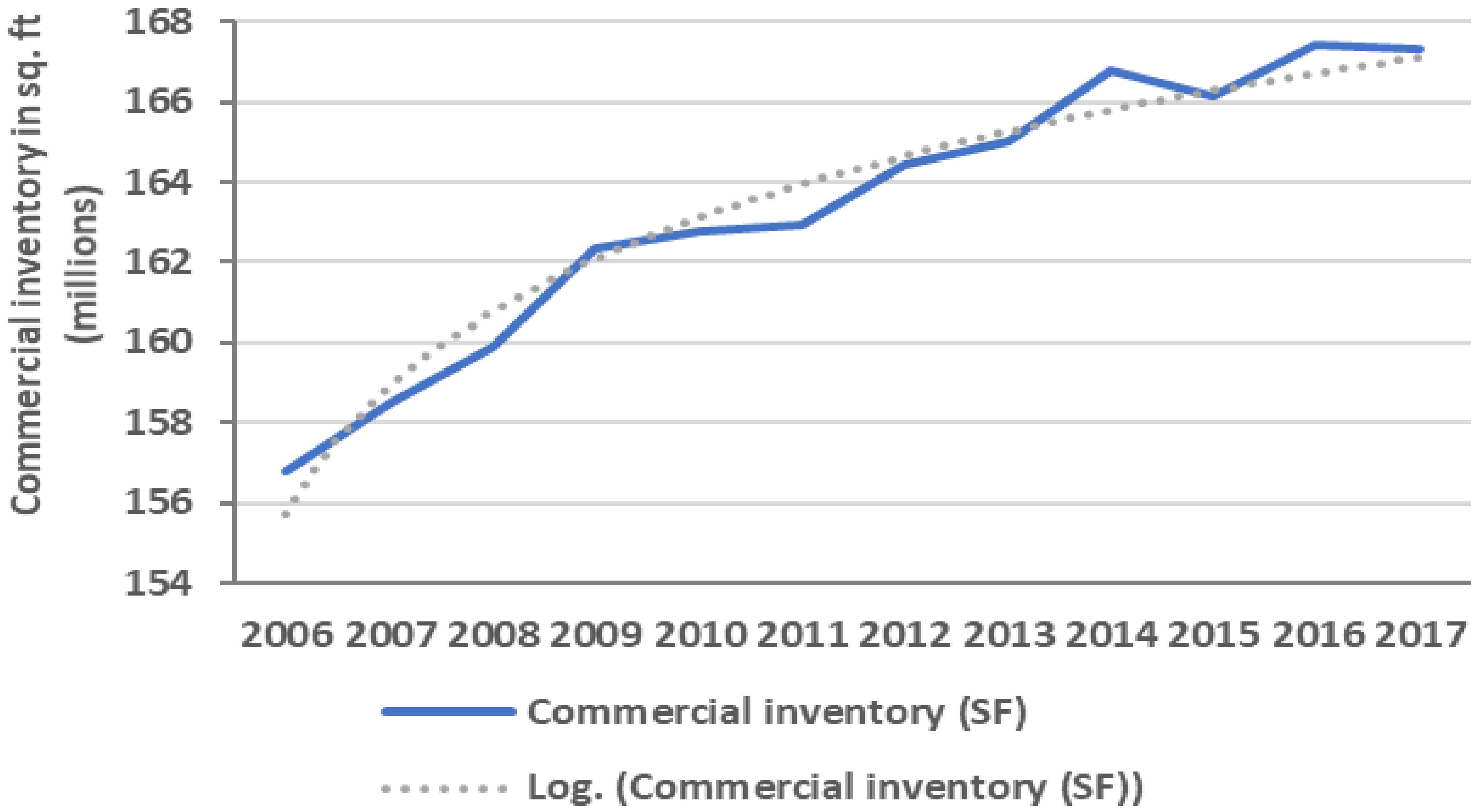
Retail and construction jobs are declining



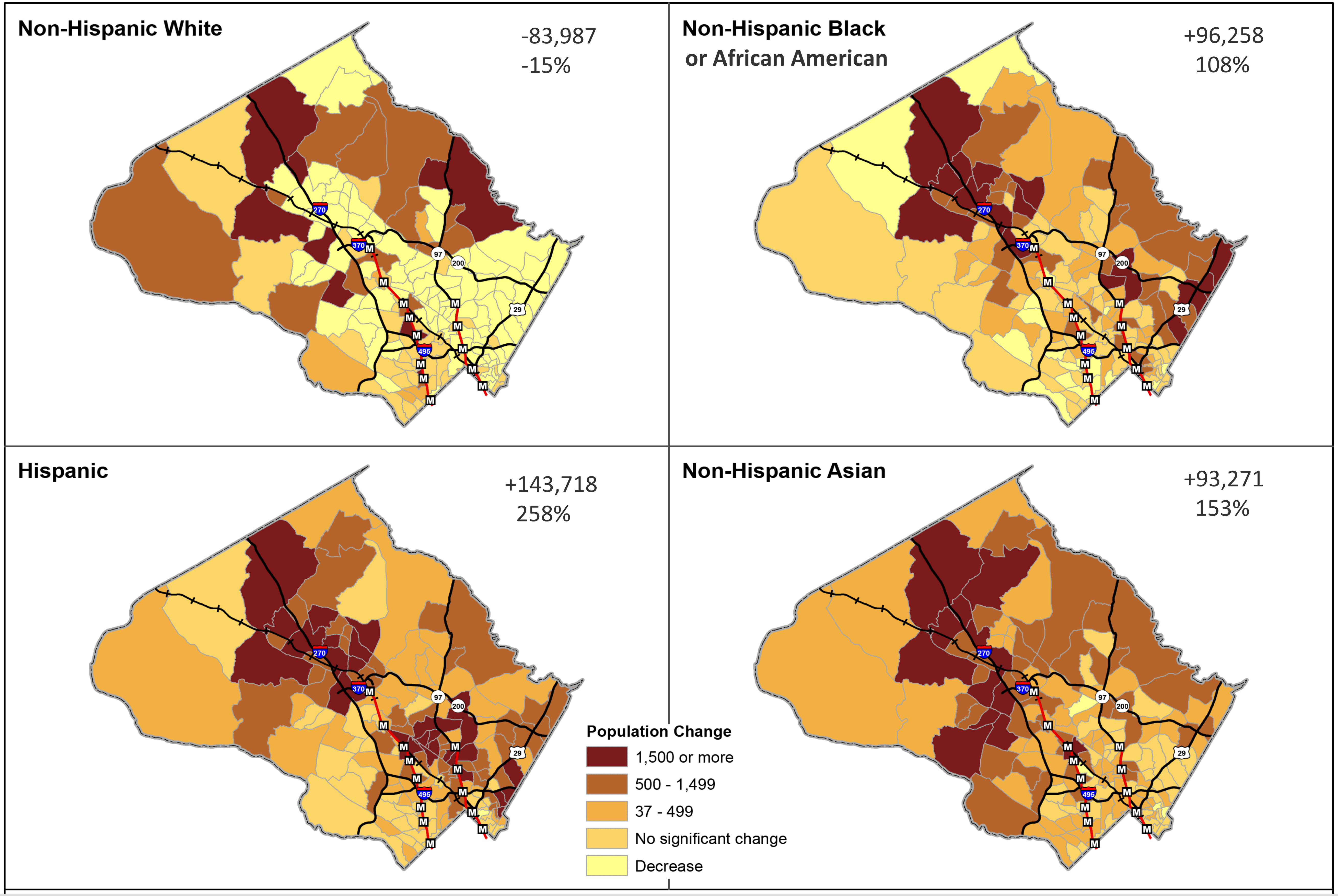
Private sector: professional services wages grew most



22 M SF of commercial space added since 1990, but rate of growth has slowed down

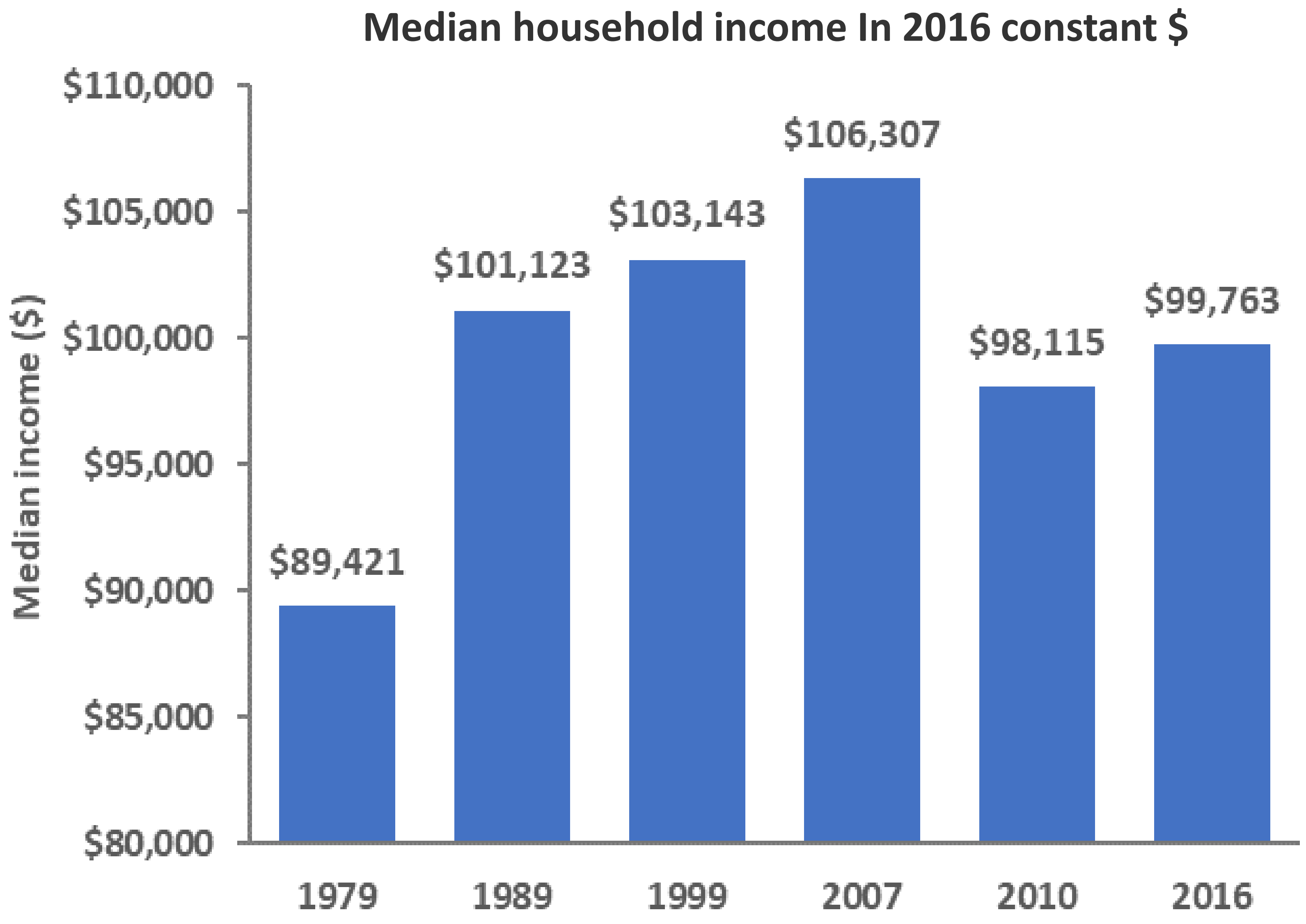


Location of Racial and Ethnic Changes from 1990 to 2016



Map 5

Household income lost ground after peaking in 2007



- 2016 median income ranks 17th among counties across the nation
- 1989 and 2016 median household incomes are within the margin or error
- Median household income has not regained lost income after peaking before the 2007-2009 recession
- Incomes in Howard, Fairfax, and Alexandria are also down 4% to 6% since 2007

Housing unit teardowns concentrated down-county and primarily single-family

- **4,400** demolition permits issued for single-family homes since 1990
- **150** teardowns per year, on average
- **6 multi-family buildings** were torn down or redeveloped since 1990
  - 756 units were demolished
  - 1,784 units added
  - 1,028 net new units yielded from redevelopment