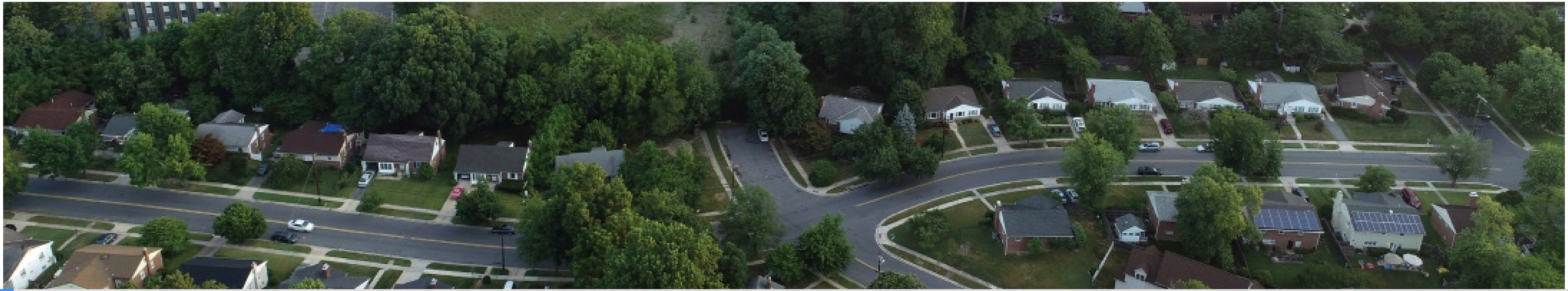


RESEARCH + SPECIAL PROJECTS

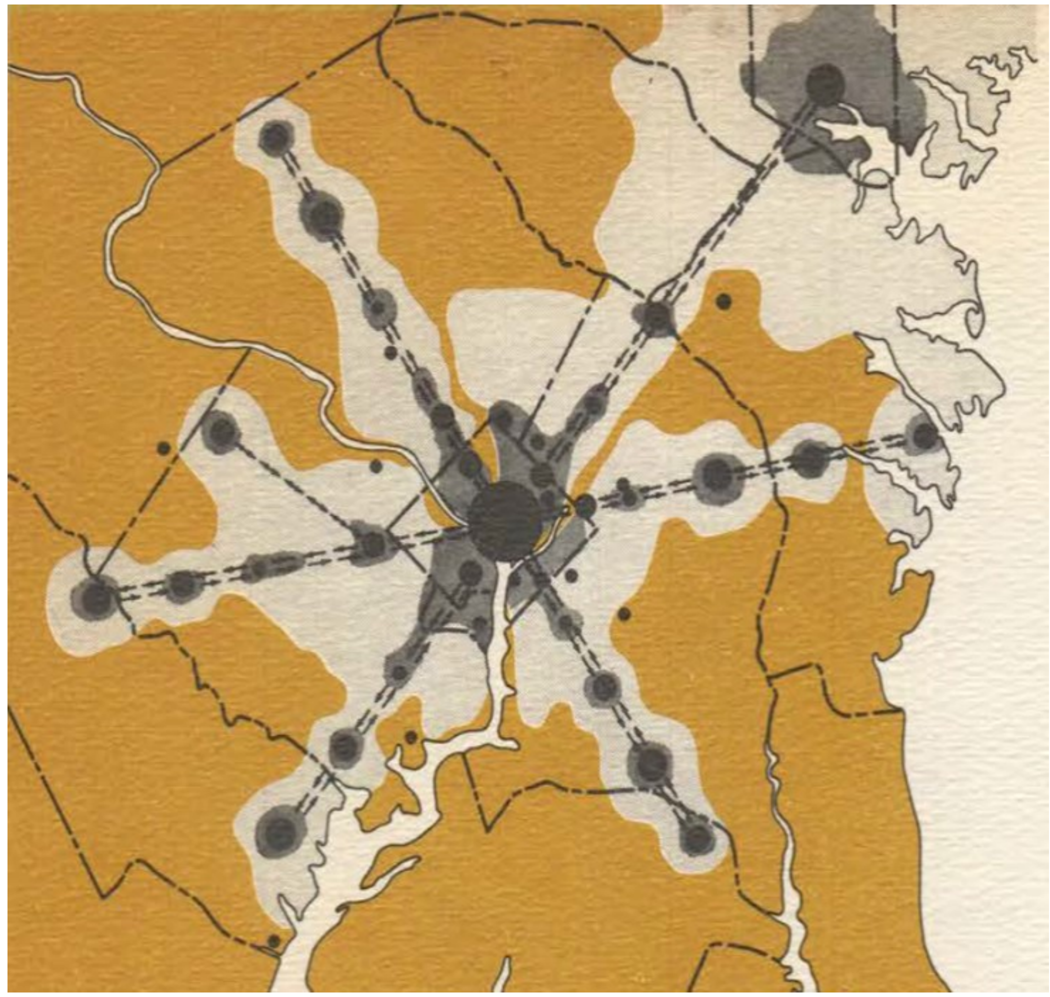
A DIVISION OF THE MONTGOMERY COUNTY PLANNING DEPARTMENT

Montgomery County Trends:

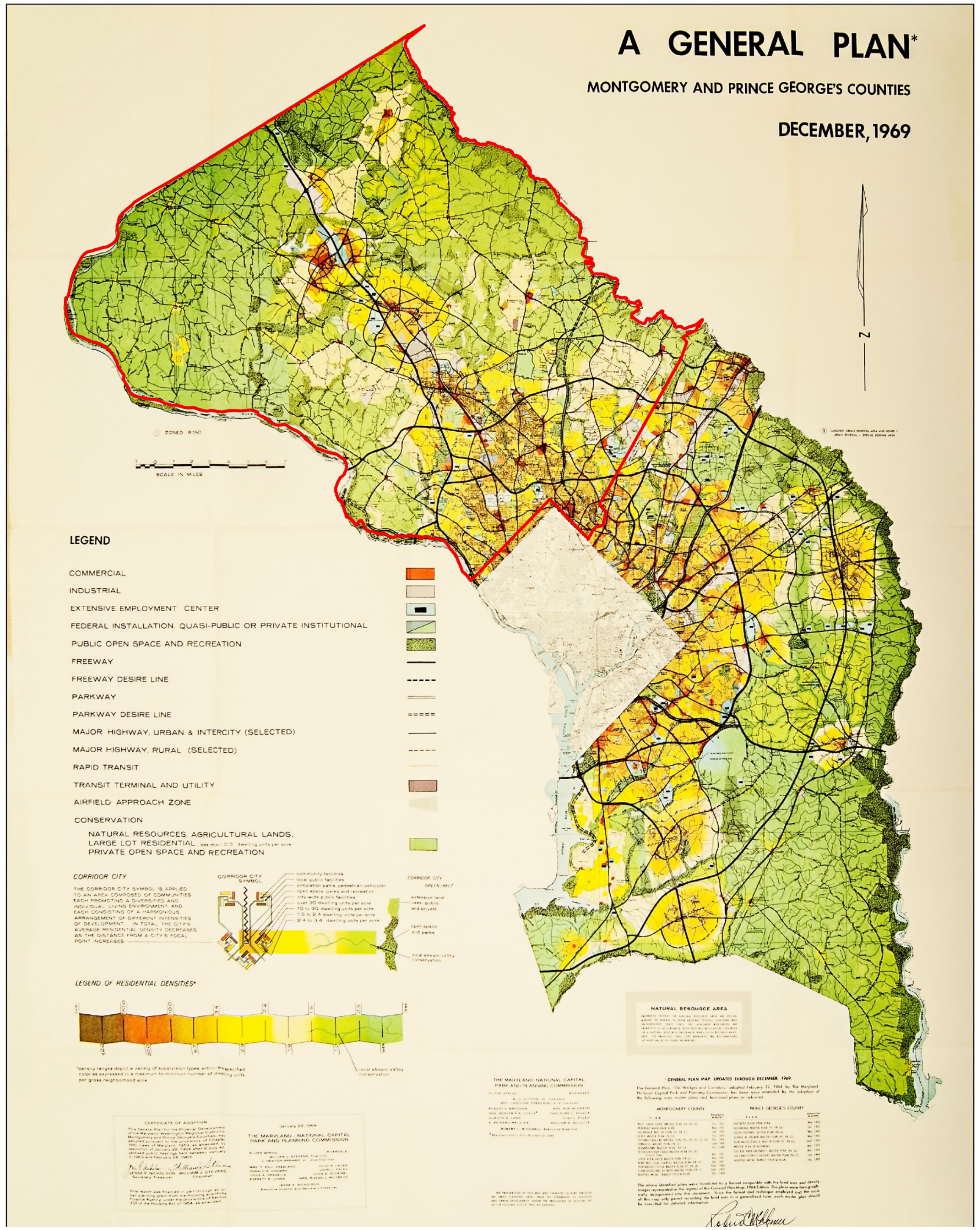
A Look at People, Housing and Jobs Since 1990

Presentation to NAIOP
March 19, 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

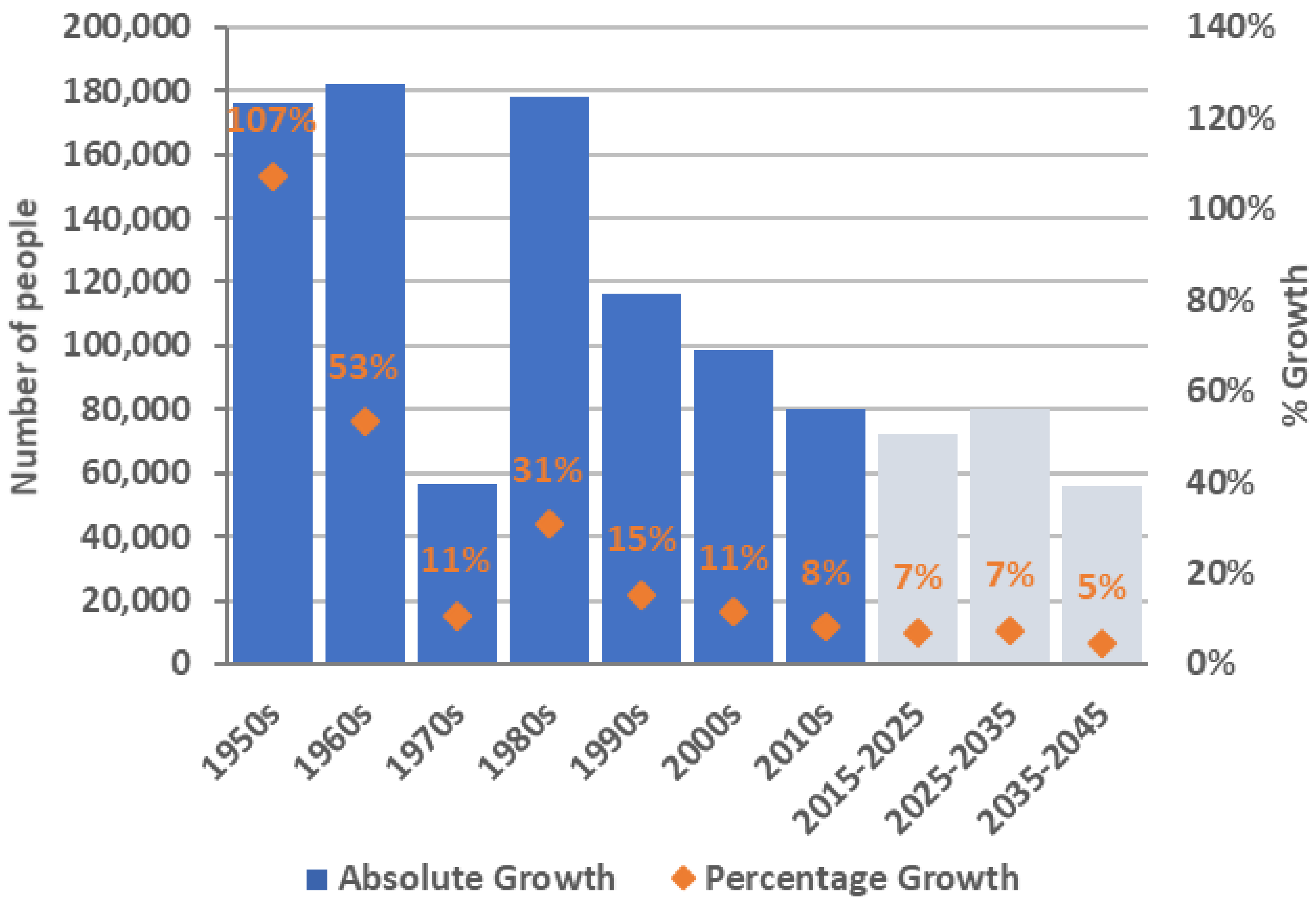
Million-plus population since 2012

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

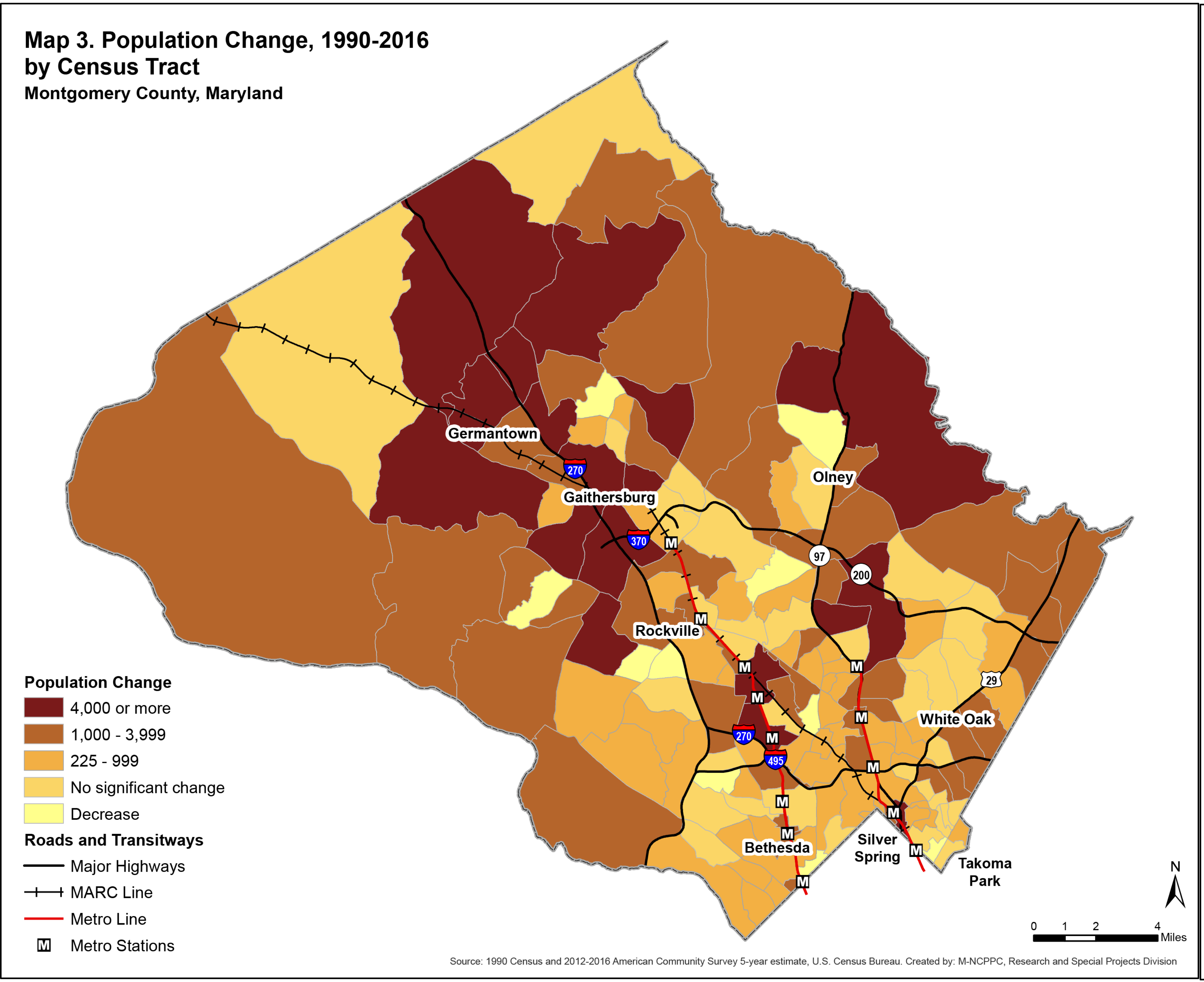
Births drive population growth & diversity

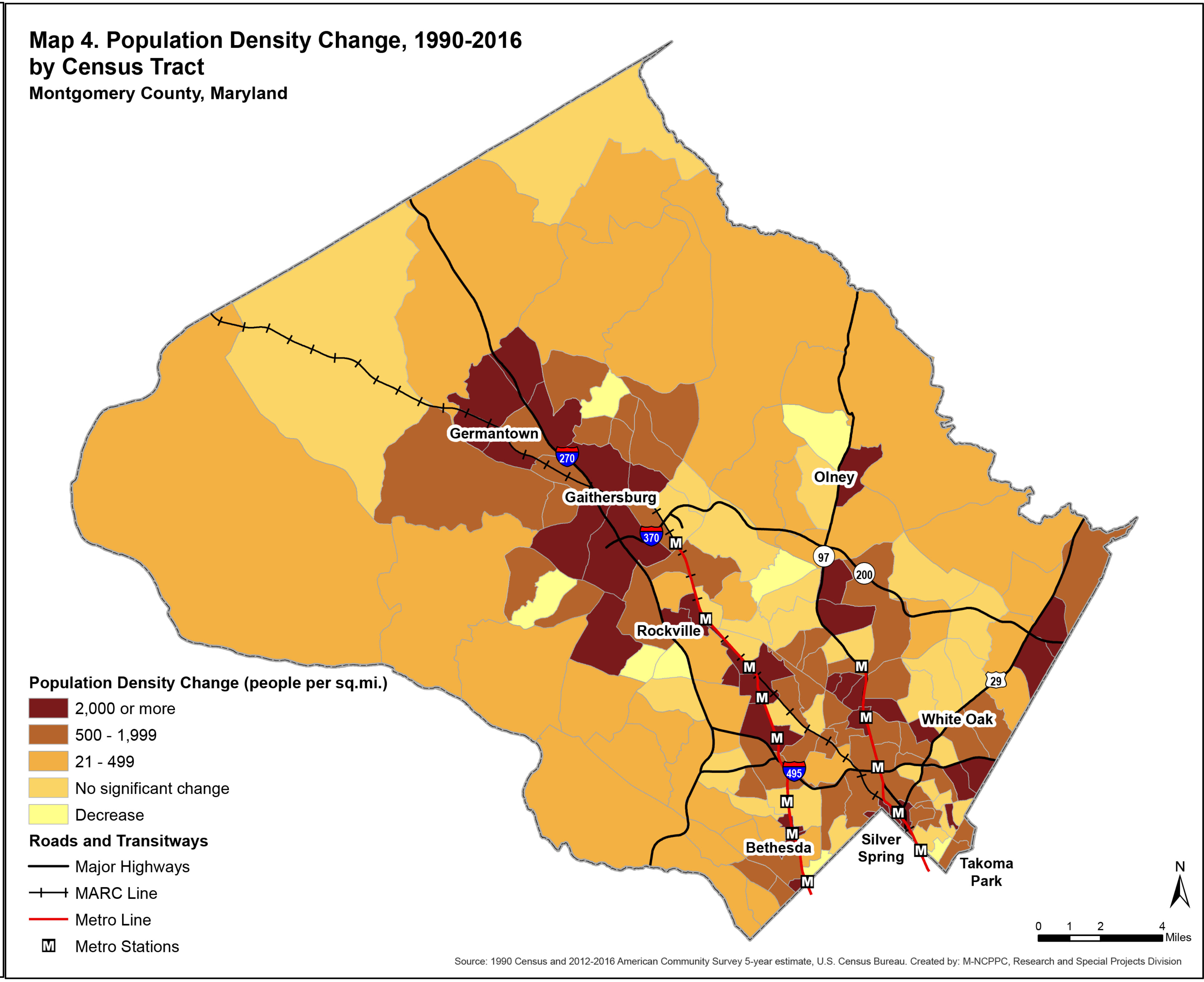
Births	+12,930
Deaths	-5,330
Average Annual	**+7,900**
Net Change since 1990	***+205,400***

International migration offsets typically net domestic out-migration

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

Location of population growth from 1990 to 2016

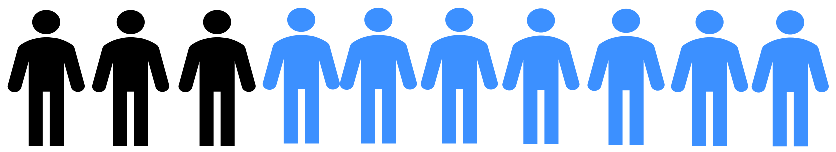




Immigration has contributed to significant diversity

Increasing foreign-born population

2016: 344,645

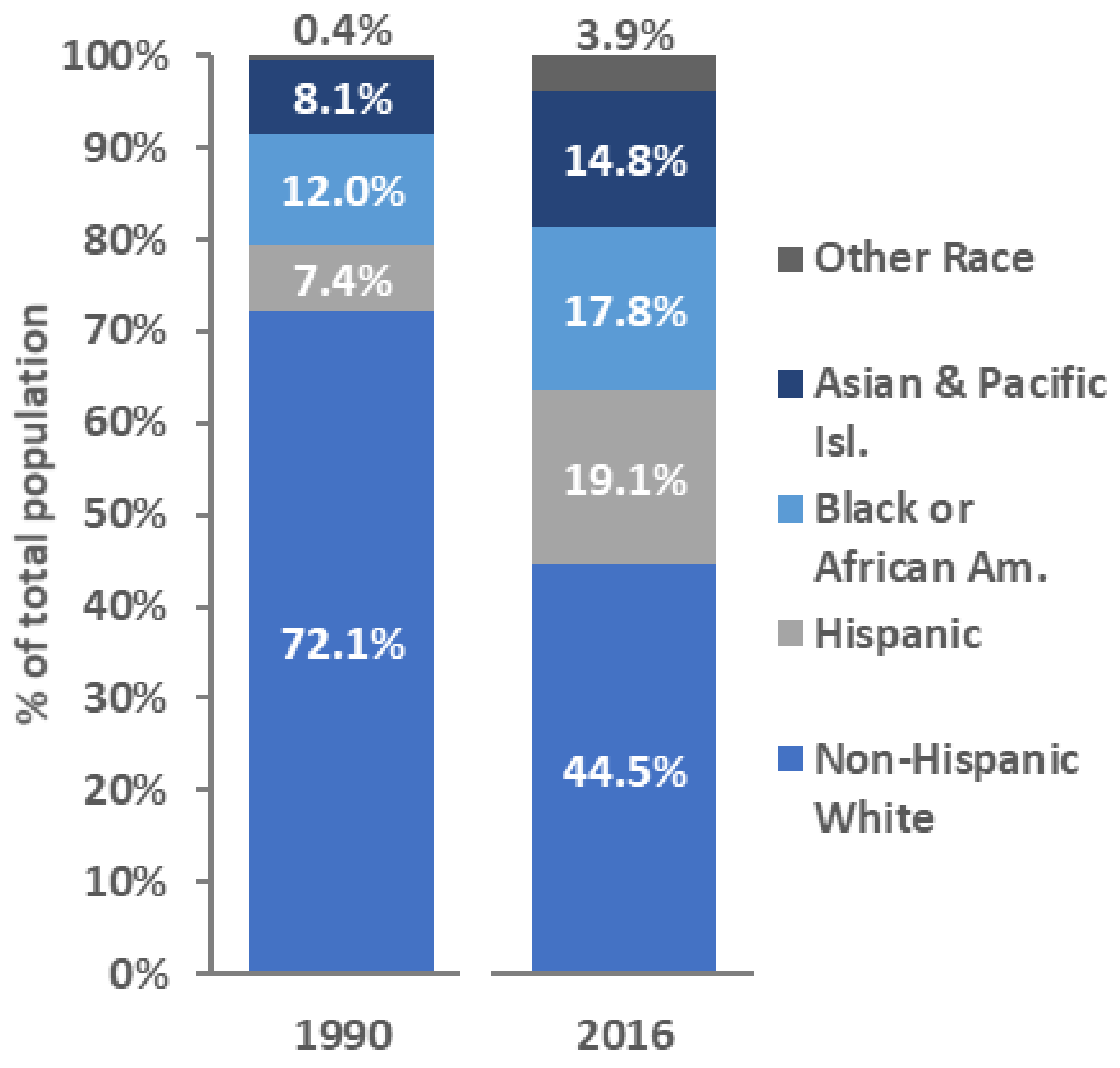


1990: 141,166 +293,300 (59%)

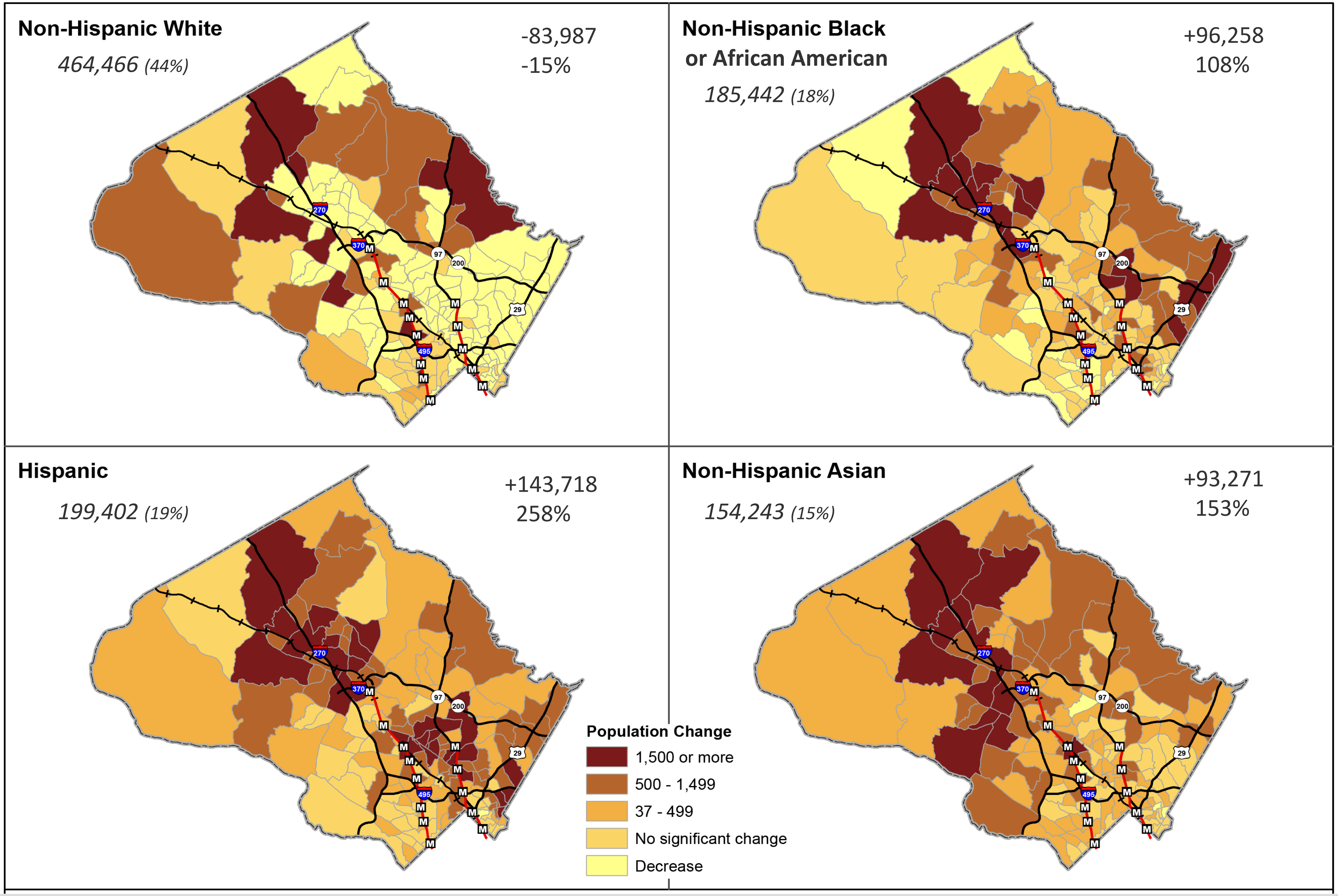
Up from 19% in 1990 to 33% in 2016

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

Greater racial & ethnic diversity

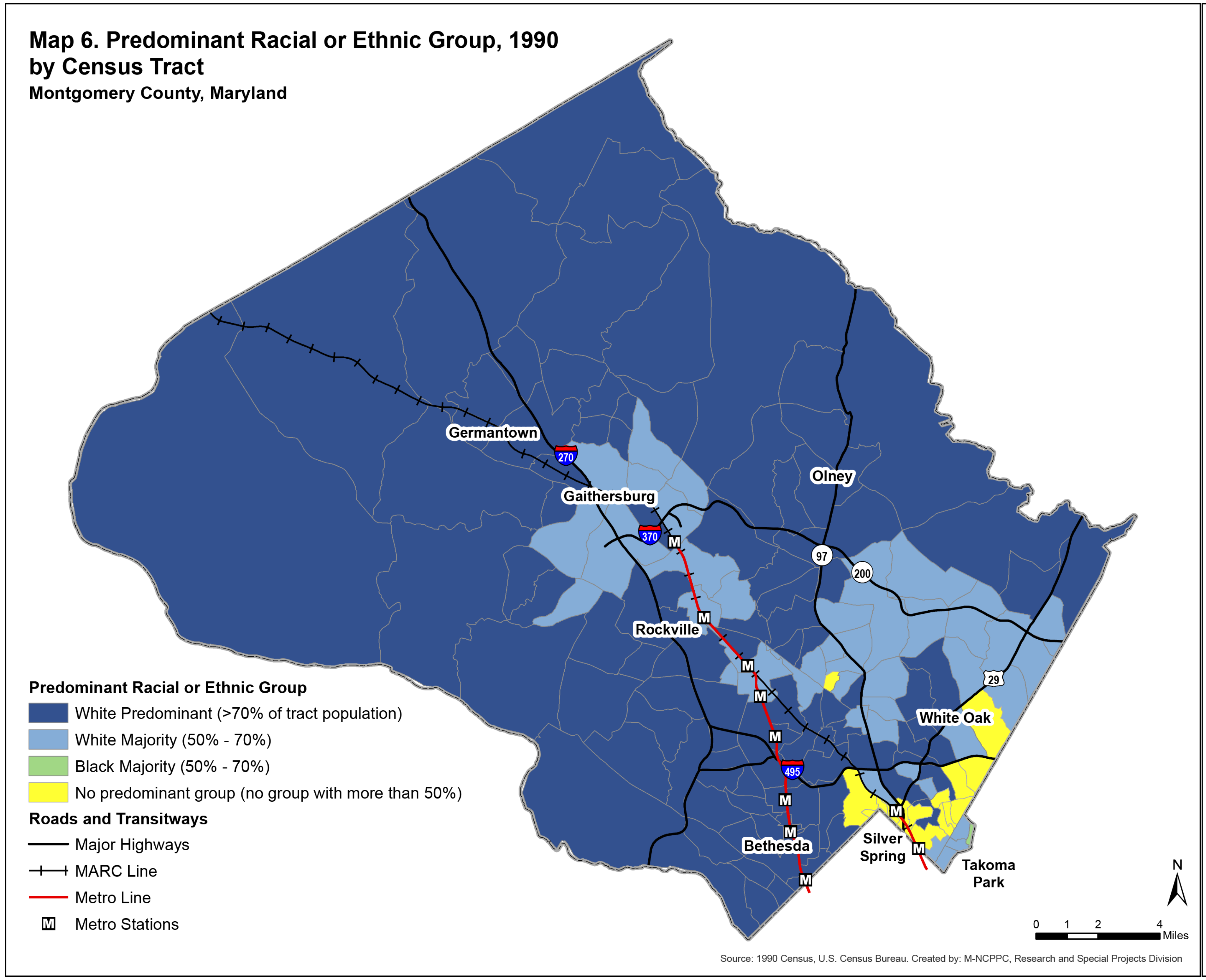


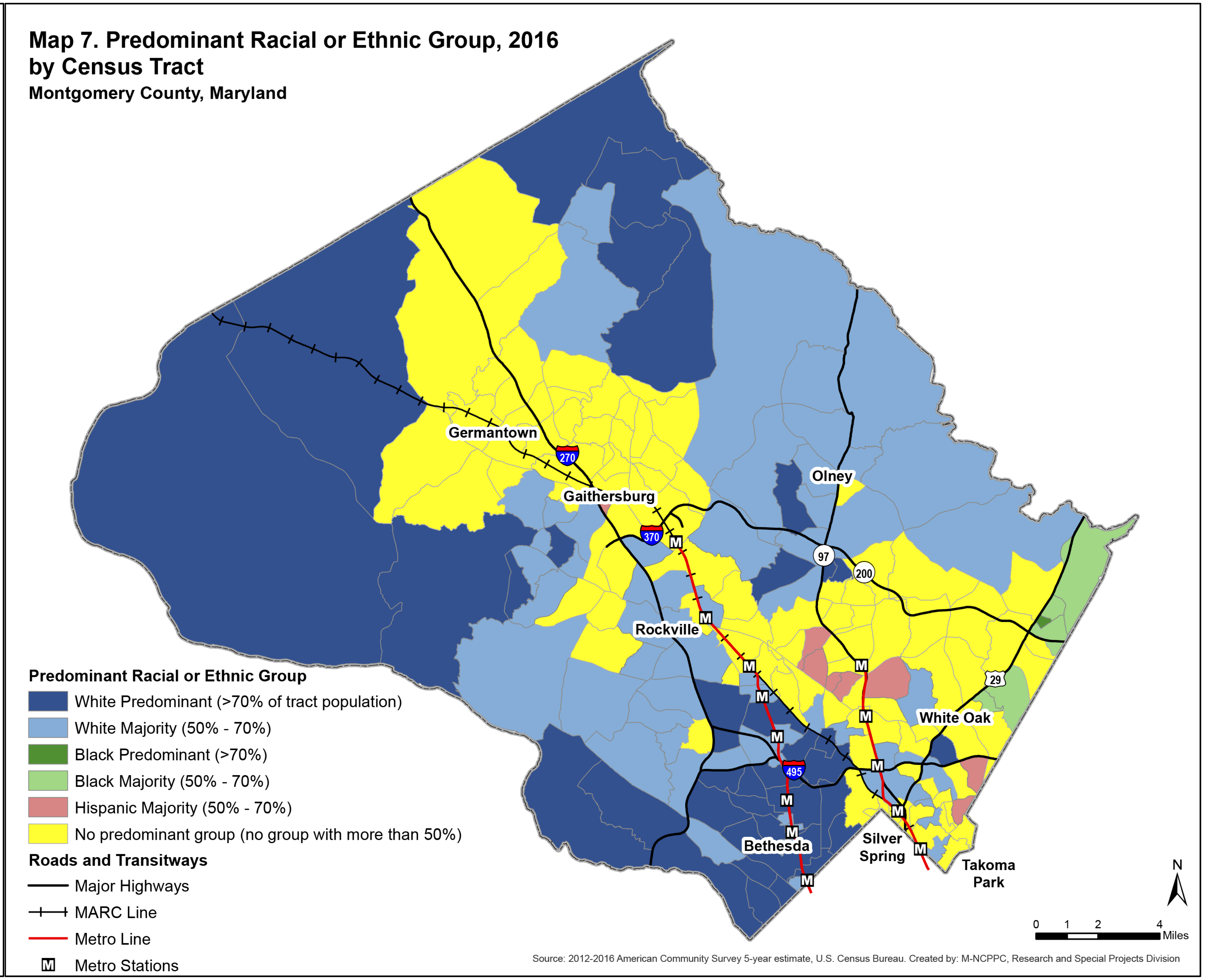
Location of Racial and Ethnic Changes from 1990 to 2016



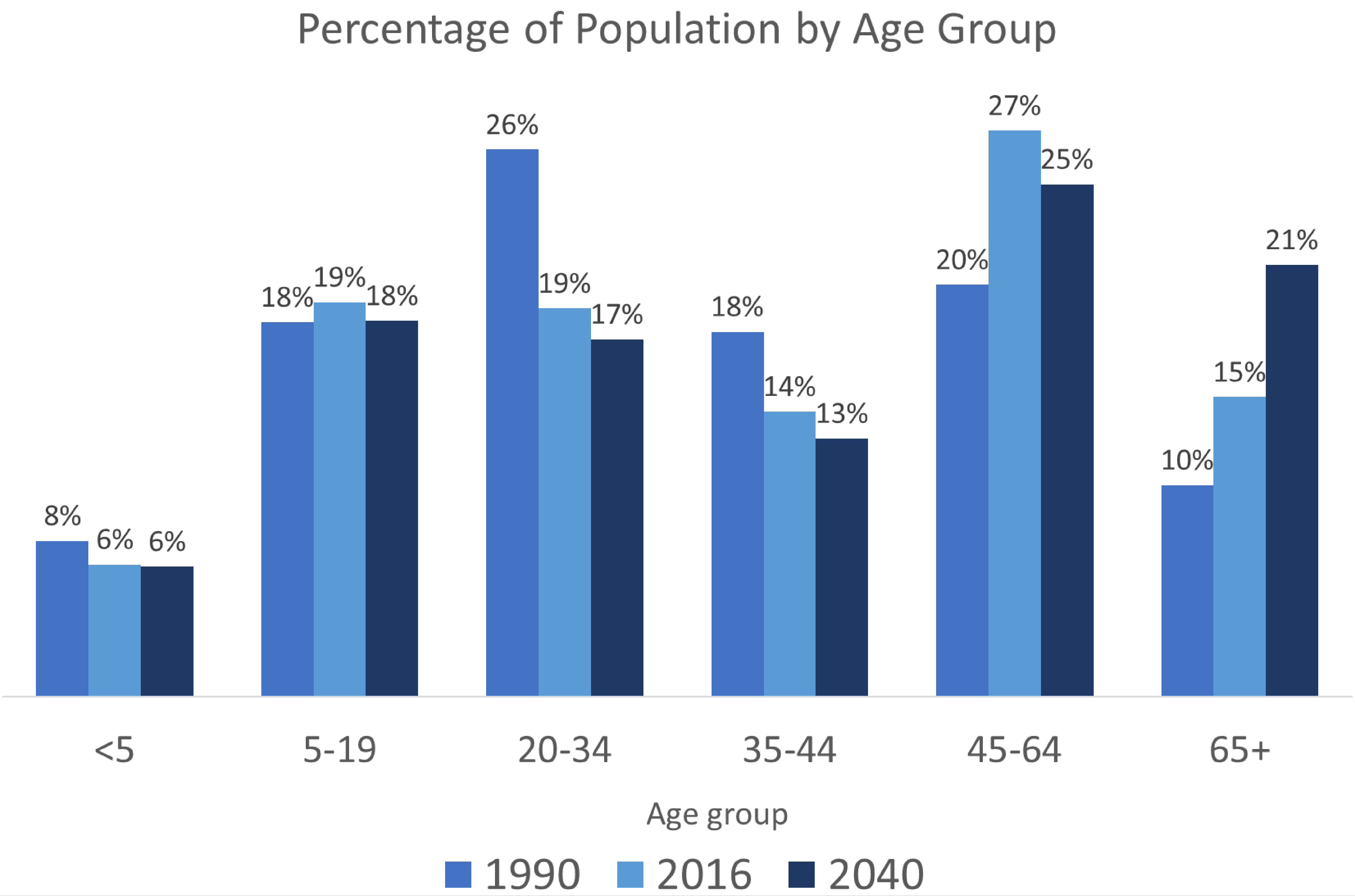
Map 5

Racial and ethnic diversity is increasing across the county



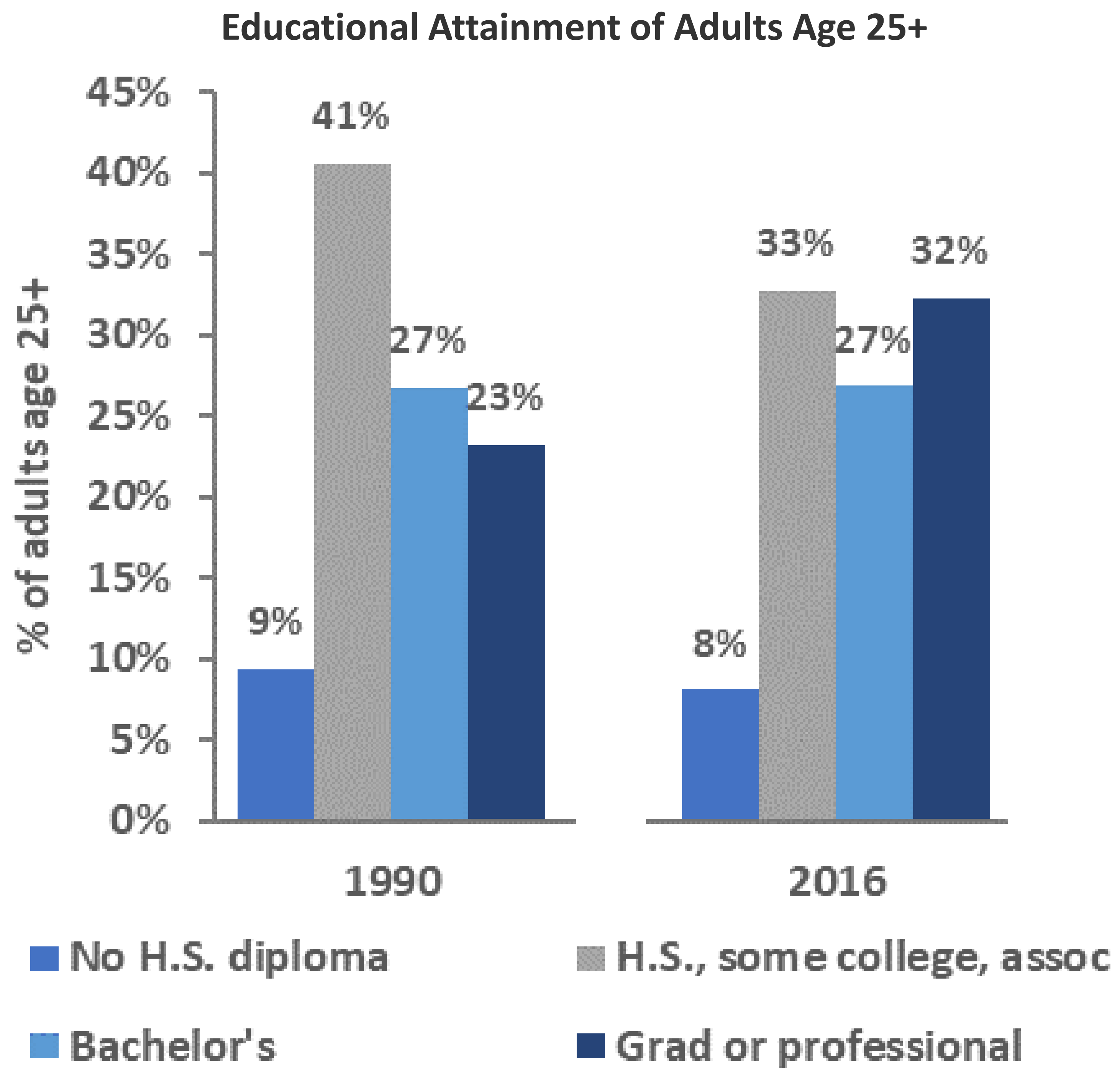


Increasingly older population



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

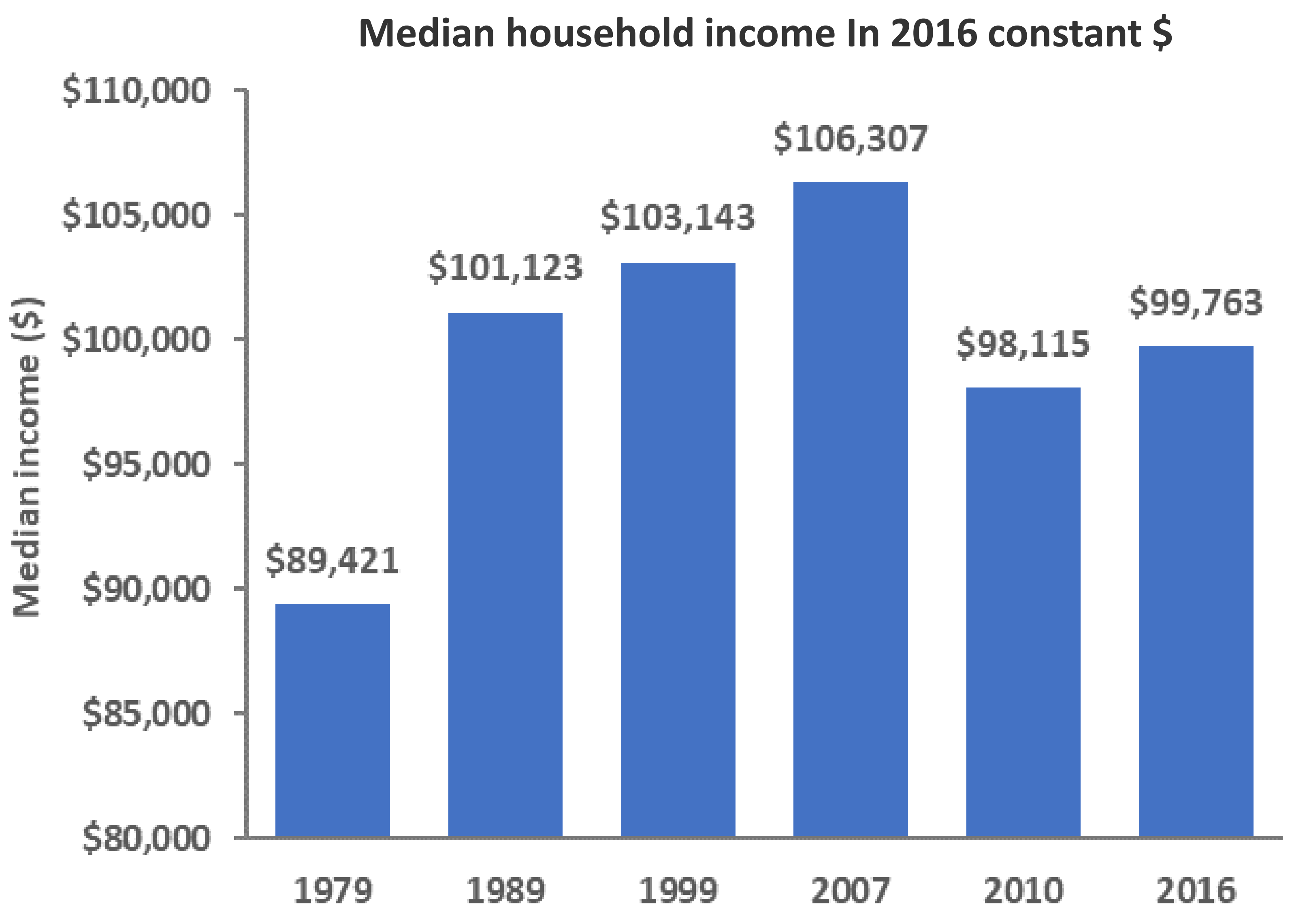
Gains in educational attainment



Highly educated adult residents:

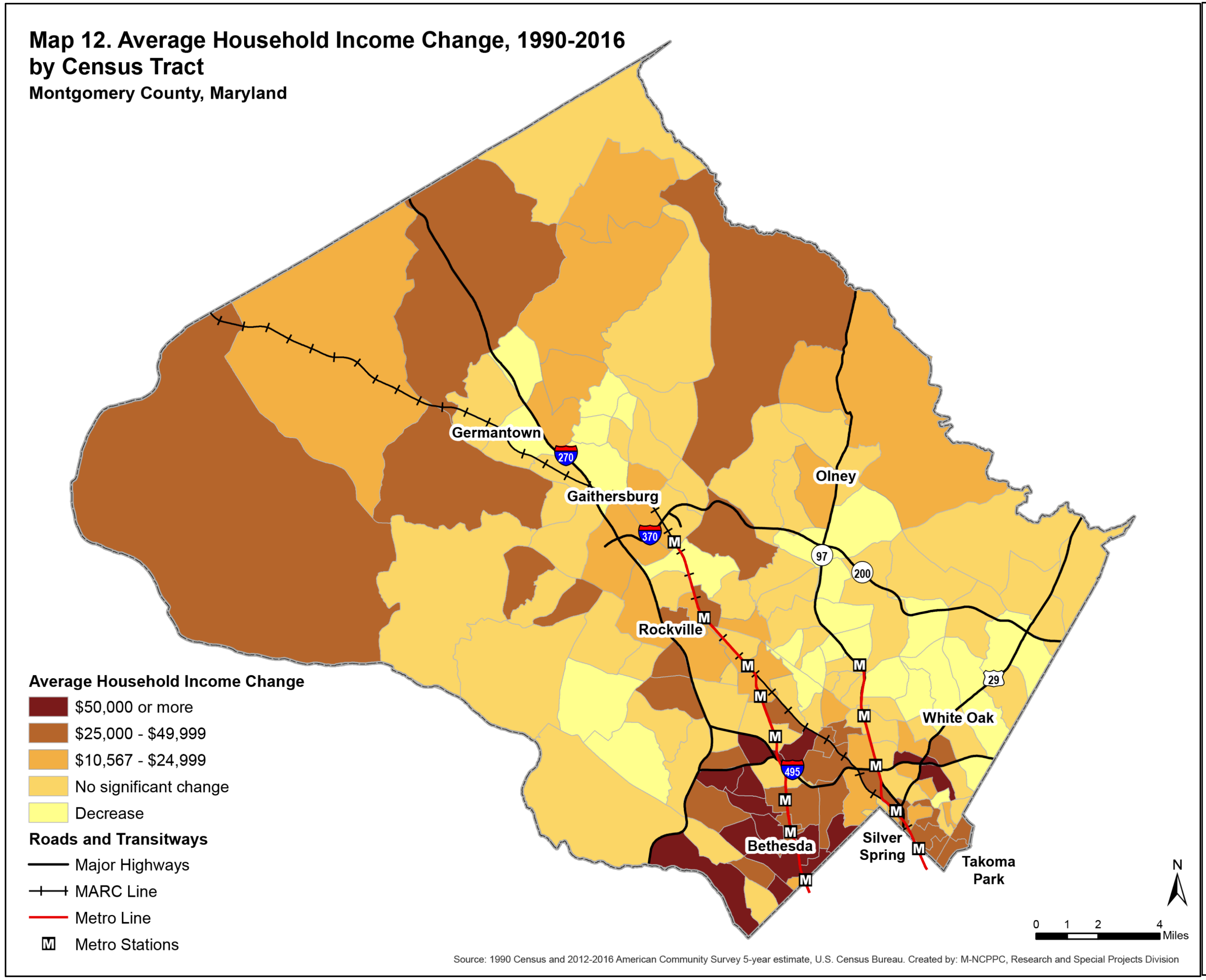
- 59% with bachelor or graduate degrees compared to 50% in region
- Concentration of advanced degrees 5th in US
- High levels of educational attainment correlated with management, business and science jobs and high median income households

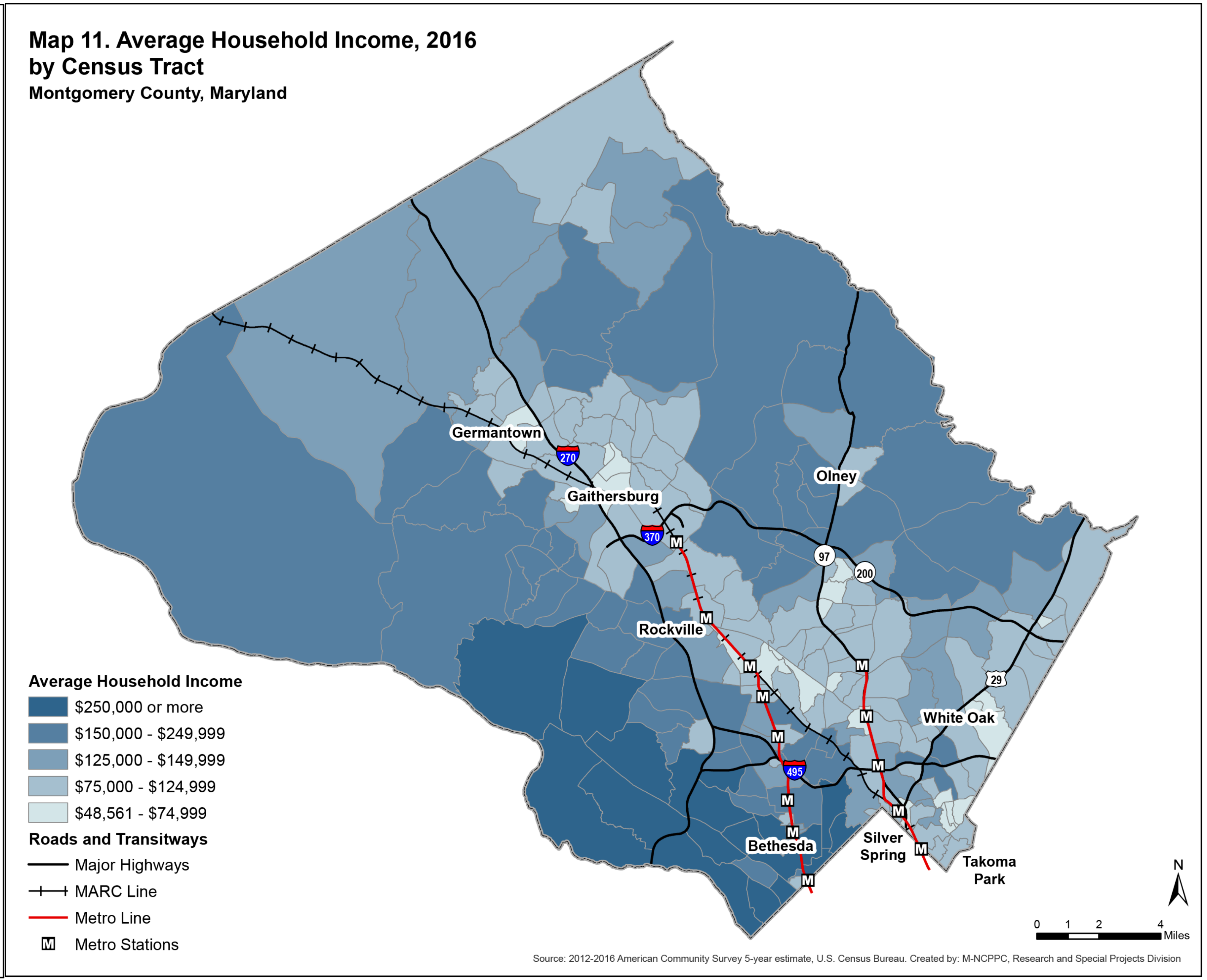
Household income lost ground after peaking in 2007



- 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

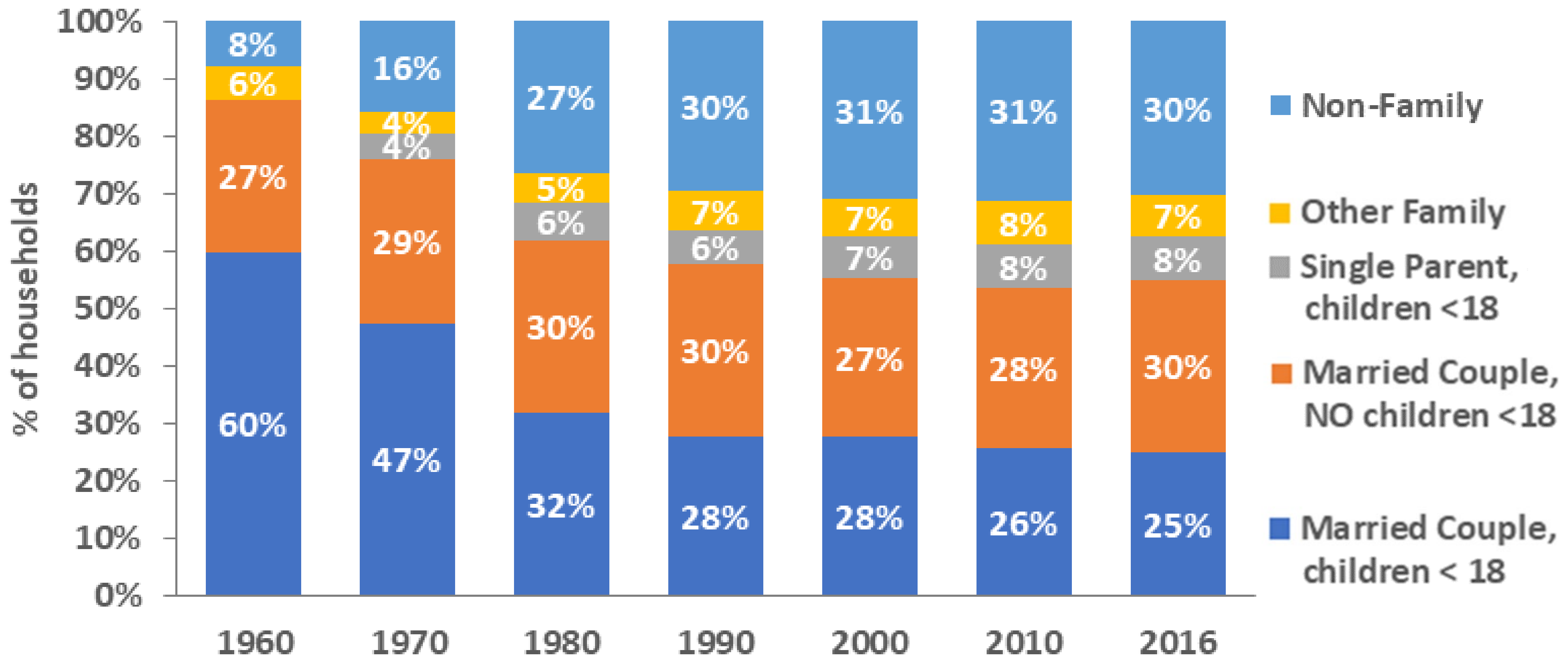
Change in household income from 1990 to 2016





Types of households stabilize after 1990

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



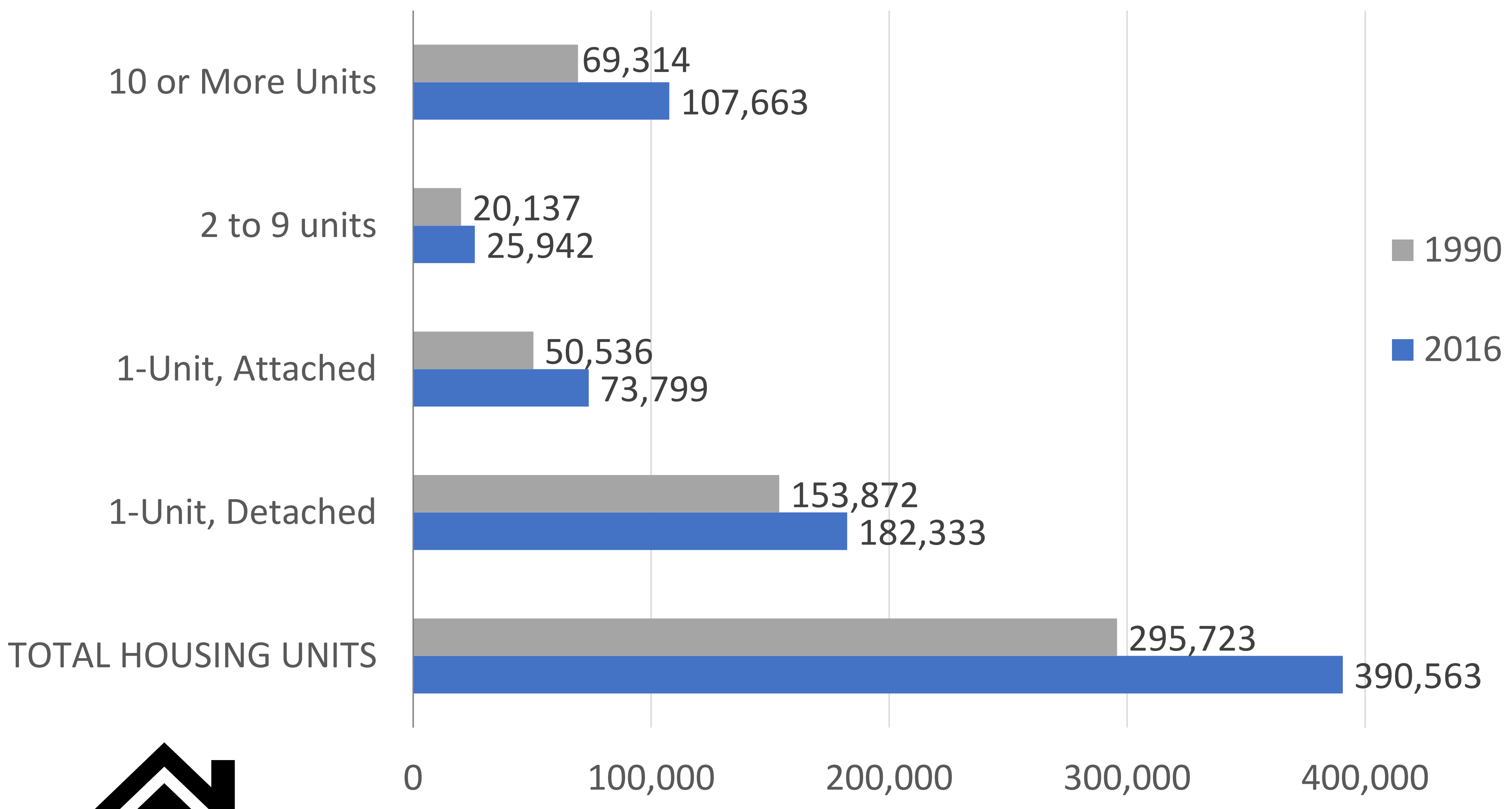
- **Non-family households are the most common household type since 2000**
- **Since 1990, married-couples with children < 18 are less common than:**
  - Married-couples with NO children < 18
  - Non-family households

HOUSING TRENDS

an evolving housing stock

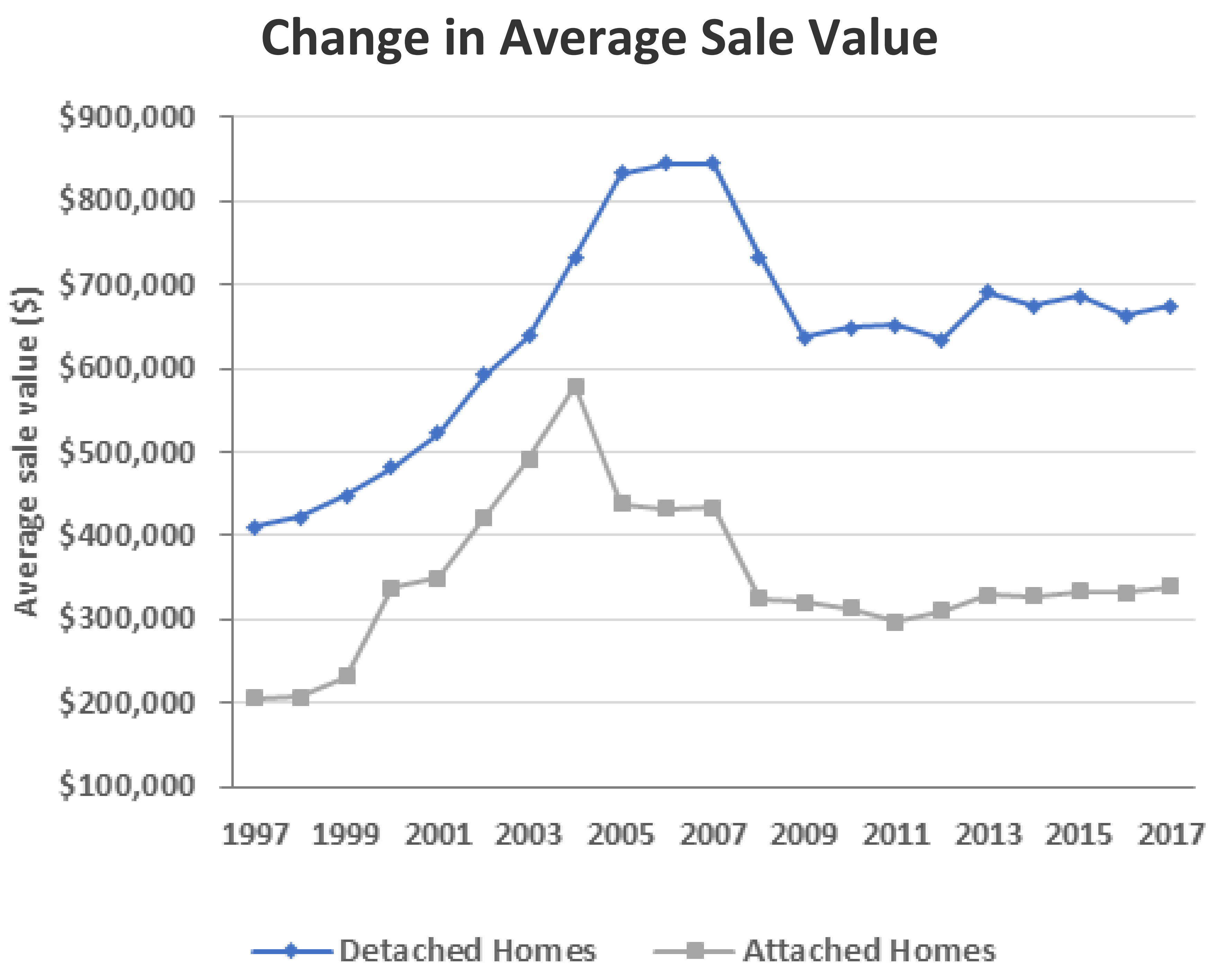
Growth of multifamily housing outpaced all other types

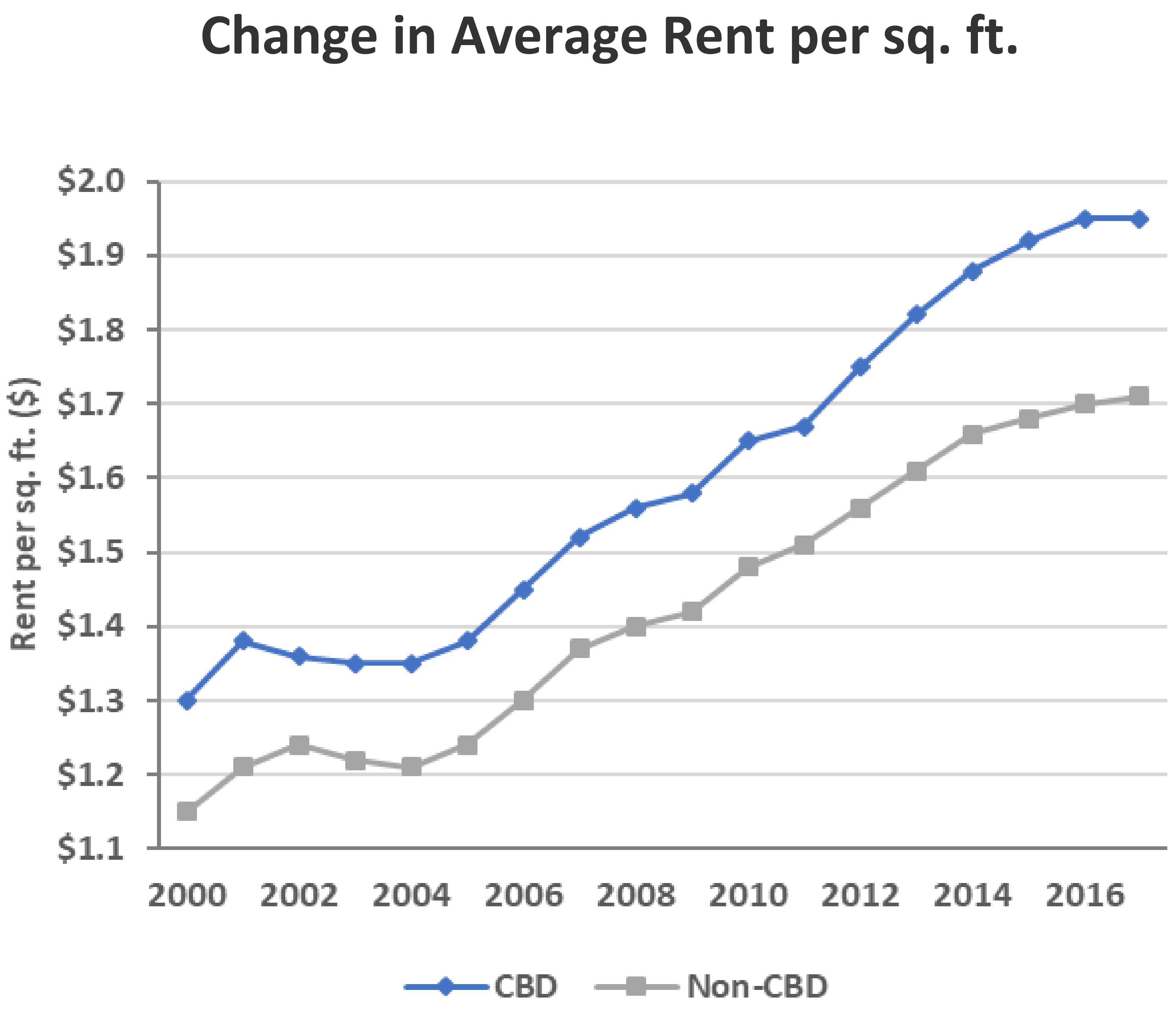
Number of housing units by type



- **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

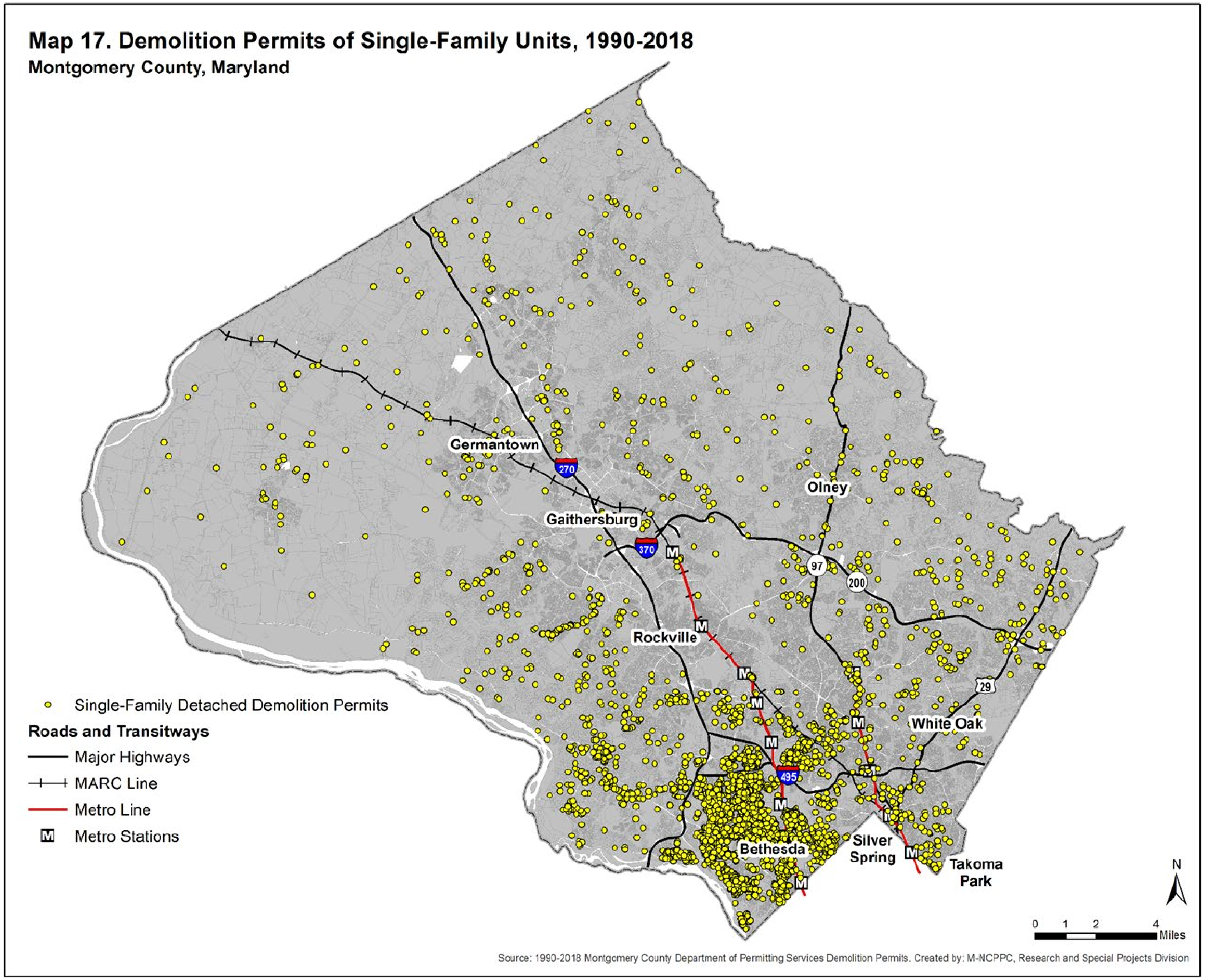
Increases in housing values (and costs) have outpaced inflation





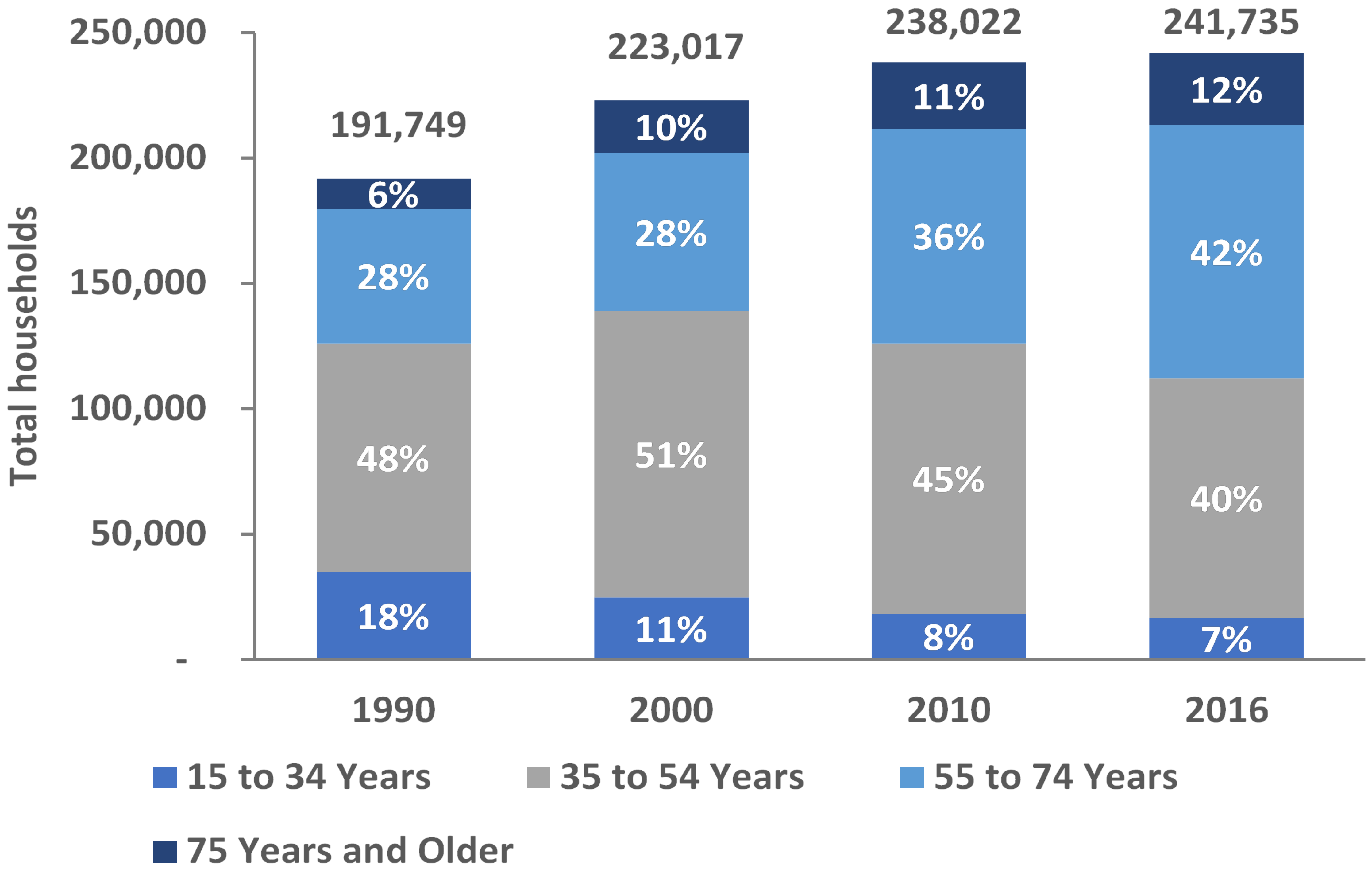
Housing unit teardowns concentrated down-county and primarily single-family

- **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



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.

EMPLOYMENT TRENDS

people who live here & people who work here

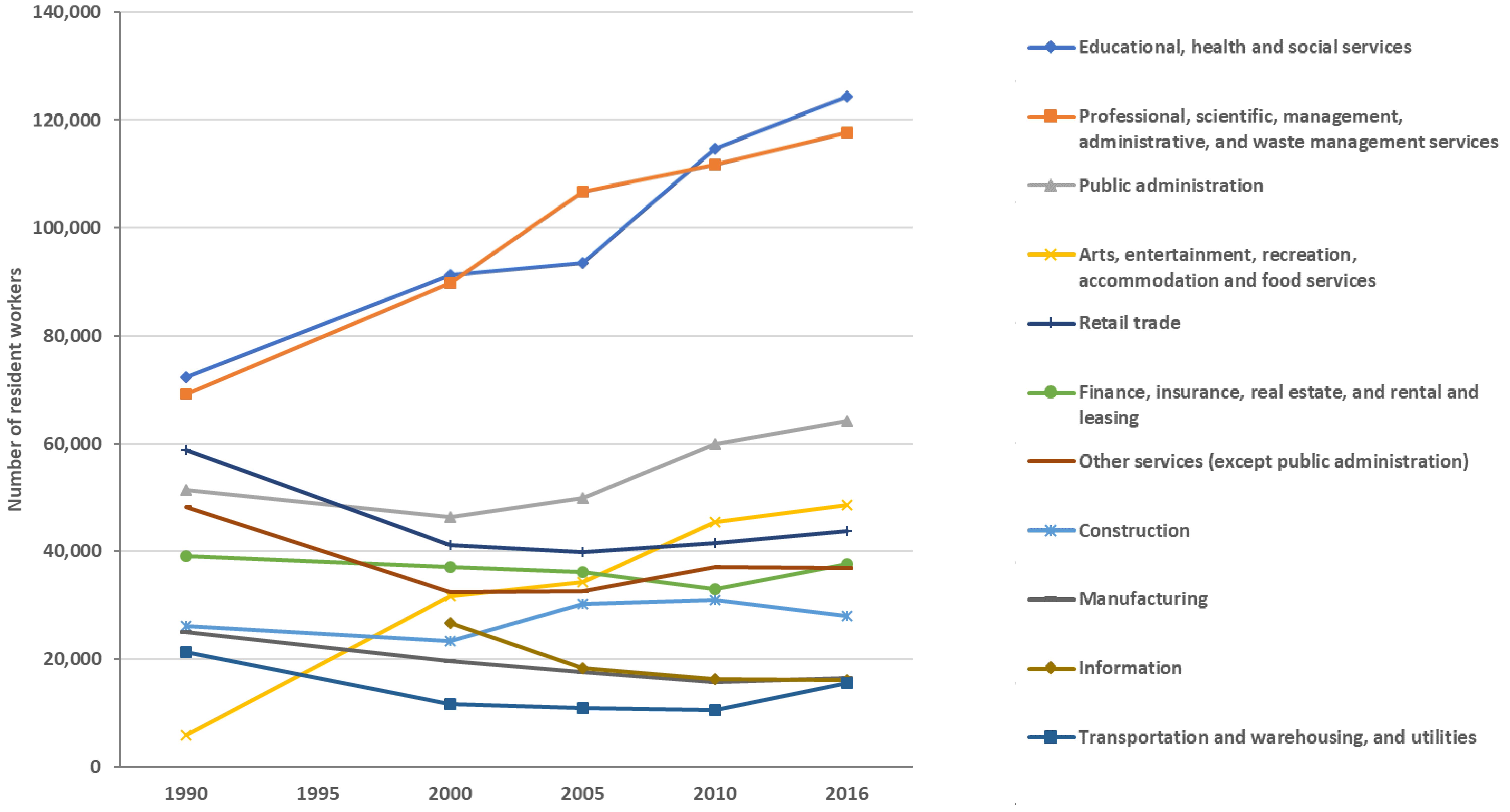
A large workforce **lives** here

- 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

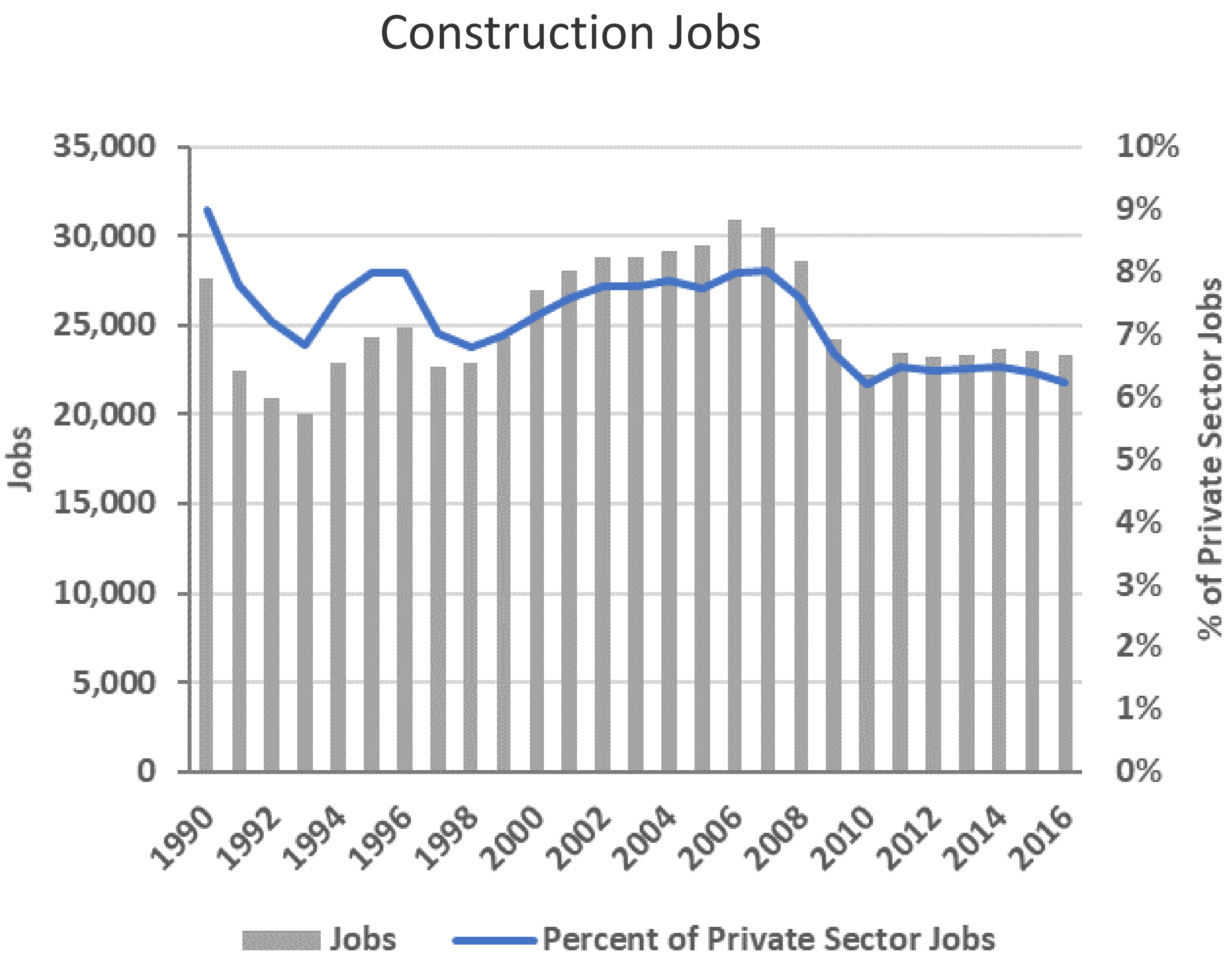
10% Federal government

9% Local government

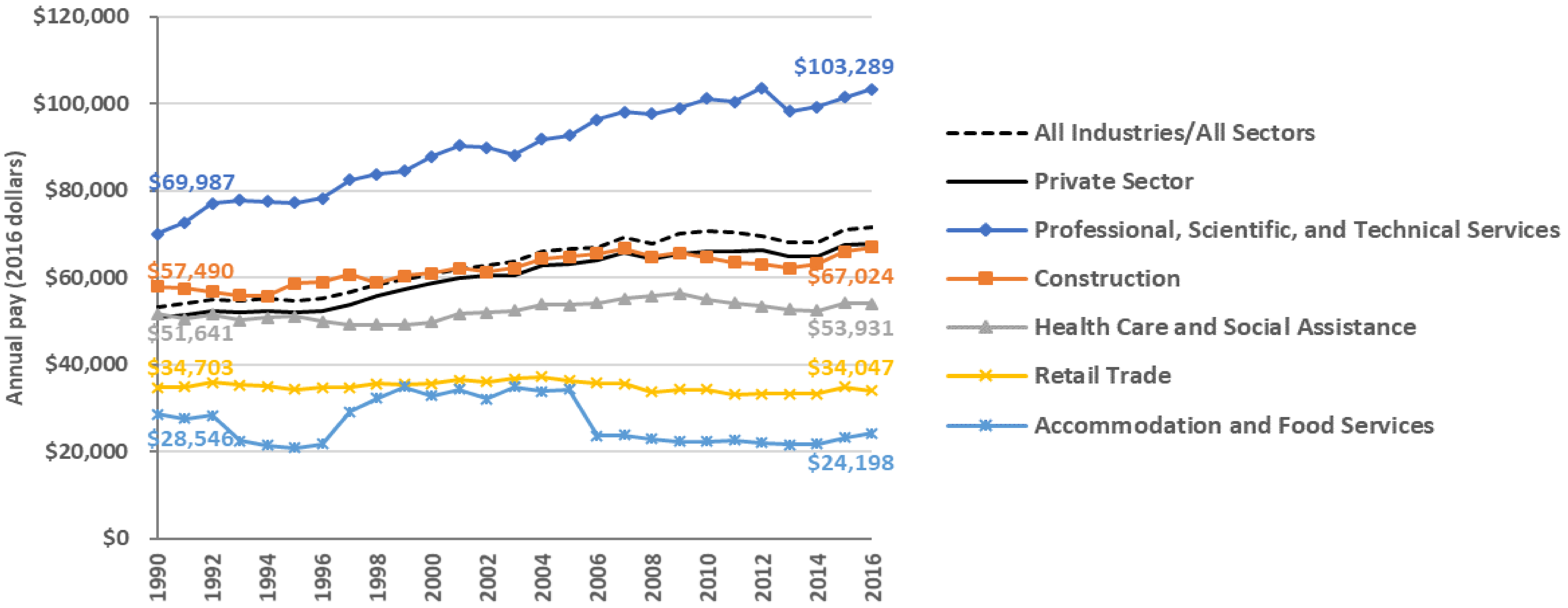
Professional, scientific and technical services is the largest at 65,000

Health care and social assistance grew the fastest at 111%

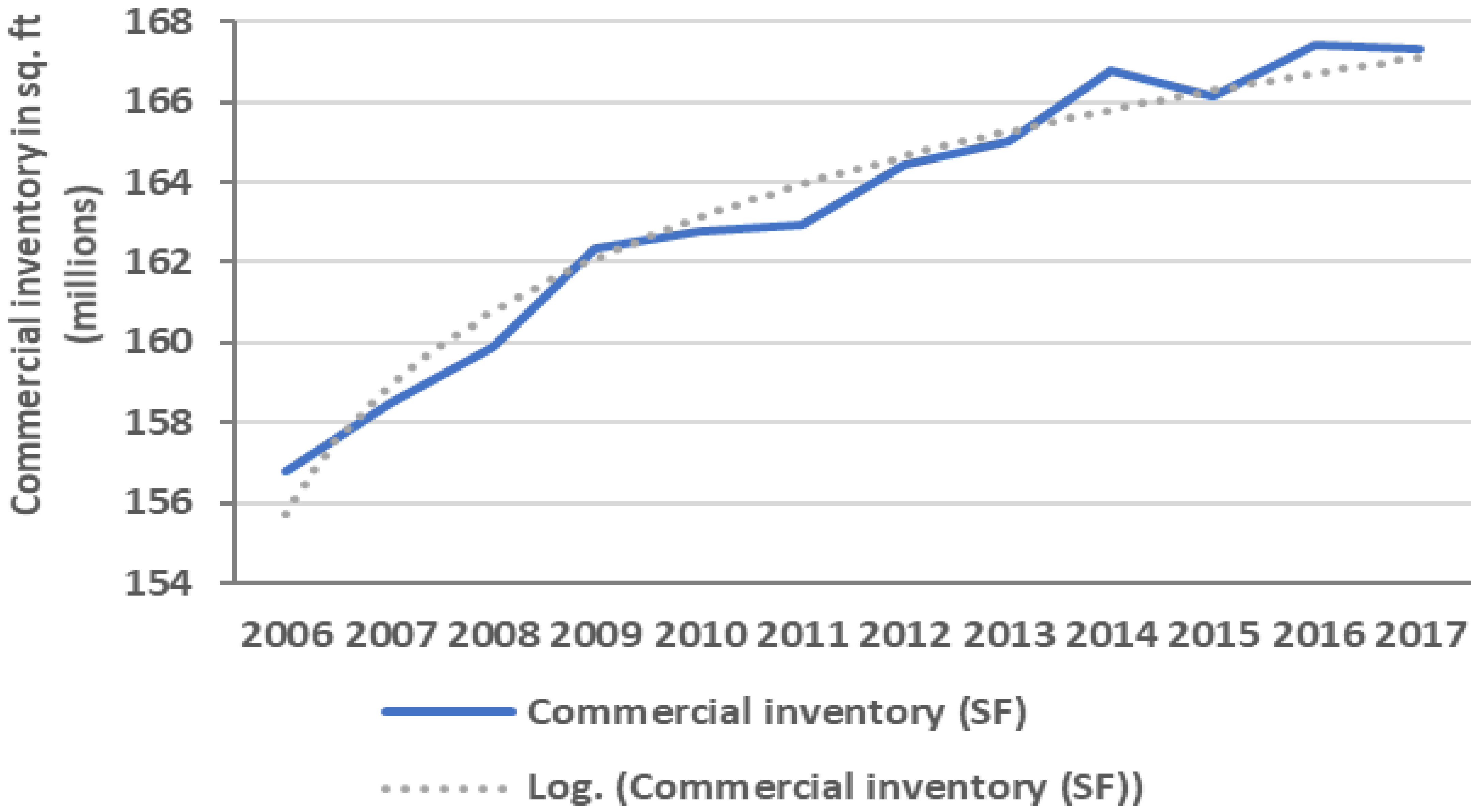
Retail and construction jobs are declining



Private sector: professional services wages grew most



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



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
- Need to shift from greenfield to infill

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