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
- Protect Farmland
- Guide Timely Infrastructure
- MPDU Law
- TDRs
- APFO

Montgomery County Trends Since 1990
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

Montgomery County Trends Since 1990
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
Montgomery County Trends Since 1990

Most populous county in Maryland

Million-plus population since 2012

1990: 765,500

2017: 1,058,800

+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

by Census Tract
Montgomery County, Maryland

Population Change
- 4,000 or more
- 1,000 - 3,999
- 225 - 999
- No significant change
- Decrease

Roads and Transitways
- Major Highways
- MARC Line
- Metro Line
- Metro Stations


by Census Tract
Montgomery County, Maryland

Population Density Change (people per sq.mi.)
- 2,000 or more
- 500 - 1,999
- 21 - 499
- No significant change
- Decrease

Roads and Transitways
- Major Highways
- MARC Line
- Metro Line
- Metro Stations

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%)
Montgomery County Trends Since 1990

Location of Racial and Ethnic Changes from 1990 to 2016

Map 5

Non-Hispanic White
464,466 (44%)
-83,987
-15%

Non-Hispanic Black or African American
185,442 (18%)
+96,258
108%

Hispanic
199,402 (19%)
+143,718
258%

Non-Hispanic Asian
154,243 (15%)
+93,271
153%

Population Change
-1,500 or more
-500 - 1,499
-37 - 499
No significant change
Decrease
Racial and ethnic diversity is increasing across the county

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

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

Montgomery County Trends Since 1990
Increasingly older population

Percentage of Population by Age Group

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

Map 12. Average Household Income Change, 1990-2016 by Census Tract
Montgomery County, Maryland

Map 11. Average Household Income, 2016 by Census Tract
Montgomery County, Maryland

Source: 1990 Census and 2012-2016 American Community Survey 5-year estimates, U.S. Census Bureau. Created by WACFPC, Research and Special Projects Division.
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

- **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

EMPLOYMENT TRENDS

people who live here & people who work here
A large workforce lives here

- Nearly **600,000** in 2016 – 2\textsuperscript{nd} 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

Montgomery County Trends Since 1990
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!

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