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

Montgomery Chamber
April 15, 2019
1964 General Plan “...on Wedges and Corridors”

• 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
Montgomery County is growing, but more slowly than in past decades.

Million-plus population since 2012

1990: 765,500  
+293,300  
2017: 1,058,800

38% population increase since 1990

Largest county in Maryland

Decreasing gain and rate of growth since 1990
Most of the growth has occurred in outer lying areas and along transit corridors.
Immigration contributes to significant diversity.

**Increasing foreign-born population**

2016: 344,645
1990: 141,166  \(+203,500\) (59%)

**Up from 19% in 1990 to 33% in 2016**

**Majority from Latin America (37%) & Asia (37%)**
1) El Salvador (47,792, 14%)
2) China (28,243, 8%)
3) India (24,306, 7%)

**Greater racial & ethnic diversity**

*People of Color: 579,397 (56%)*

- **1990**
  - Hispanic: 72.1%
  - Non-Hispanic White: 44.5%
  - Other Race: 0.4%
  - Asian & Pacific Isl.: 7.4%
  - Black or African Am.: 17.8%

- **2016**
  - Hispanic: 44.5%
  - Non-Hispanic White: 44.5%
  - Other Race: 3.9%
  - Asian & Pacific Isl.: 14.8%
  - Black or African Am.: 19.1%
Racial and ethnic diversity is increasingly distributed across the county.
Driven by the baby boomers, the population is aging.

Increased median age from **33.9 years** in 1990 to **39 years** in 2016
Montgomery County remains highly educated.

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
Increases in housing prices have outpaced income growth.

**Average Sale Price**

- **Detached Homes**
- **Attached Homes**

**Average Rent PSF**

- **CBD**
- **Non-CBD**

**Median Income**

- 1979: $89,421
- 1989: $101,123
- 1999: $103,143
- 2007: $106,307
- 2010: $98,115
- 2016: $99,763

*All dollar values adjusted for inflation*
The top two industries employed 40% of residents in 2016, compared to 33% in 1990.

Resident employment, by industry

600,000 residents in the workforce

2nd largest workforce in the region
Most residents live and work in Montgomery County.

Percentage of resident workers who live and work in the same county
More people are working at home.

*Percentage of resident workers who work at home*

<table>
<thead>
<tr>
<th>County</th>
<th>1990</th>
<th>2016</th>
</tr>
</thead>
<tbody>
<tr>
<td>Montgomery County</td>
<td>3.8%</td>
<td>6.2%</td>
</tr>
<tr>
<td>Frederick County</td>
<td>3.5%</td>
<td>7.1%</td>
</tr>
<tr>
<td>Prince George's County</td>
<td>1.4%</td>
<td>3.3%</td>
</tr>
<tr>
<td>Howard County</td>
<td>2.9%</td>
<td>5.8%</td>
</tr>
<tr>
<td>District of Columbia</td>
<td>2.4%</td>
<td>6.0%</td>
</tr>
<tr>
<td>Fairfax County</td>
<td>2.9%</td>
<td>6.7%</td>
</tr>
<tr>
<td>Loudoun County</td>
<td>3.8%</td>
<td>8.2%</td>
</tr>
<tr>
<td>Arlington County</td>
<td>2.7%</td>
<td>5.7%</td>
</tr>
</tbody>
</table>
The number of QCEW jobs in the county increased by 21% since 1990 to 460,0000 in 2016.

The sizes of the sectors have remained stable over time, according to data in the Quarterly Census of Employment and Wages (QCEW)

- 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 experience greatest declines
Employment forecast has declined over time.

Comparison of select forecasts to actual employment, 1994-2017
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 development to redevelopment
THANK YOU!

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