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

RESEARCH + SPECIAL PROJECTS
A DIVISION OF THE MONTGOMERY COUNTY PLANNING DEPARTMENT
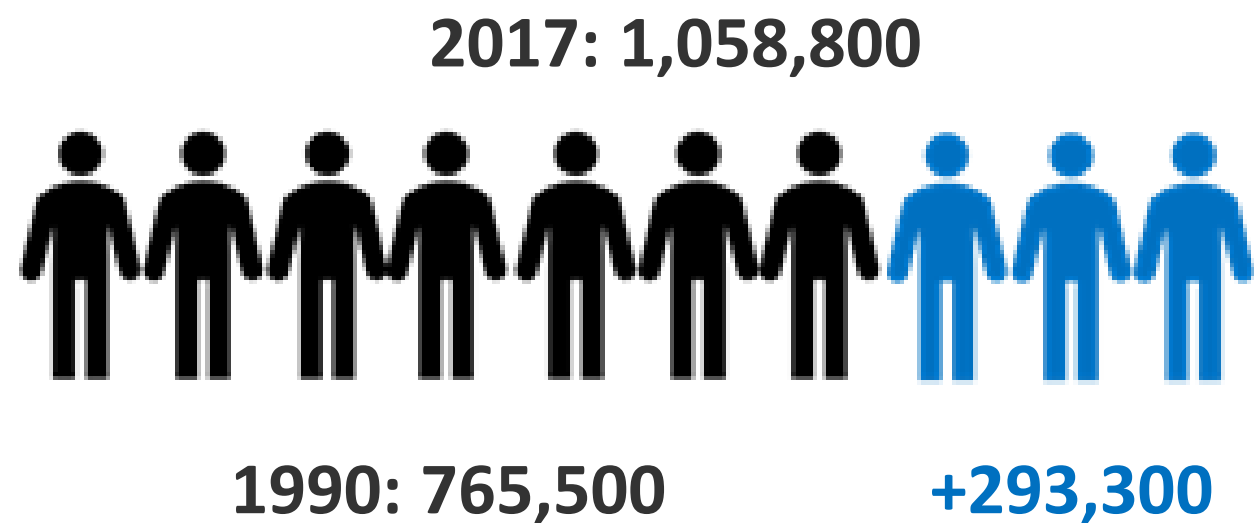
Montgomery Chamber
April 15, 2019

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

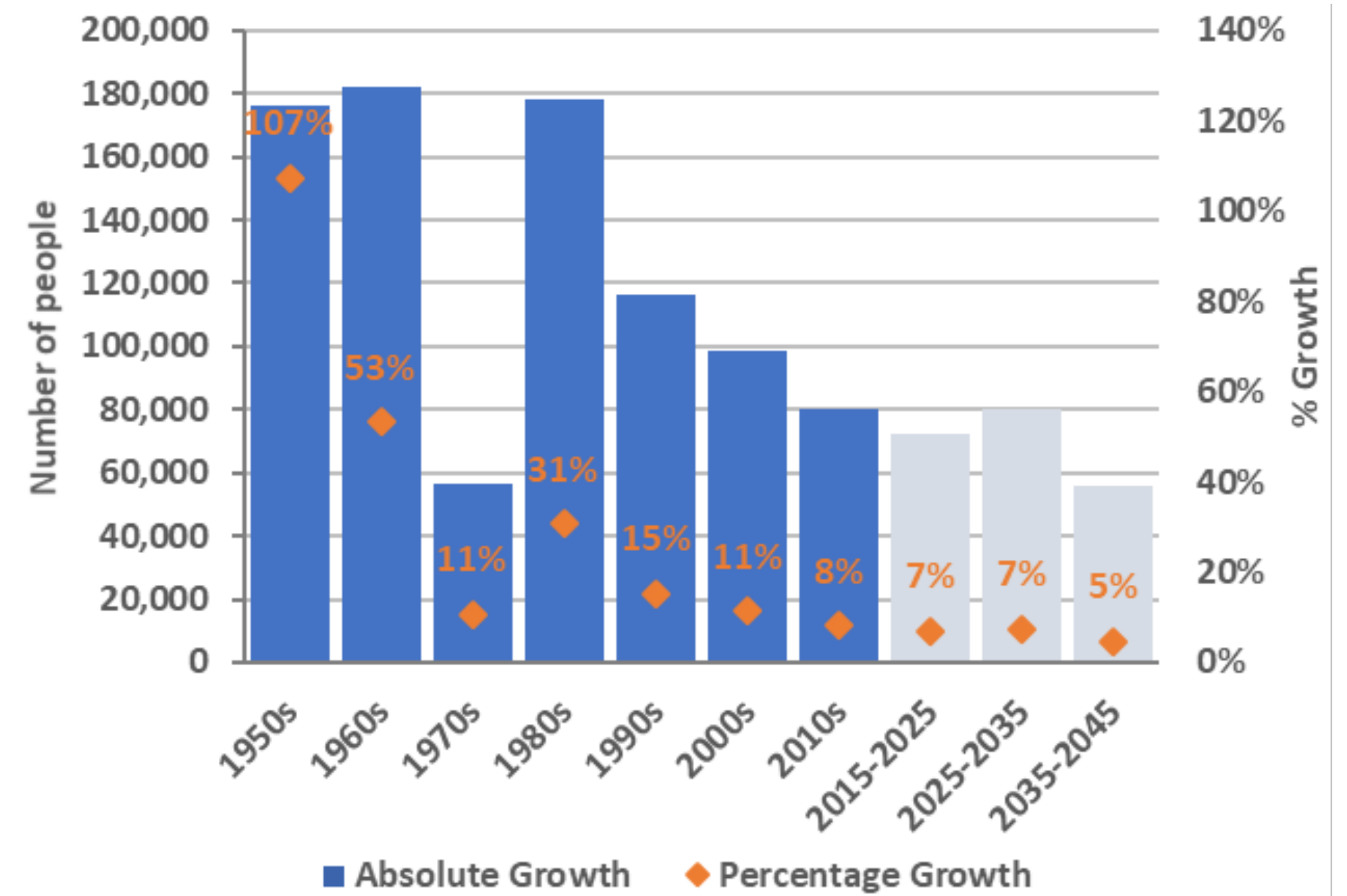# Montgomery County is growing, but more slowly than in past decades.

Million-plus population since 2012

2017: 1,058,800

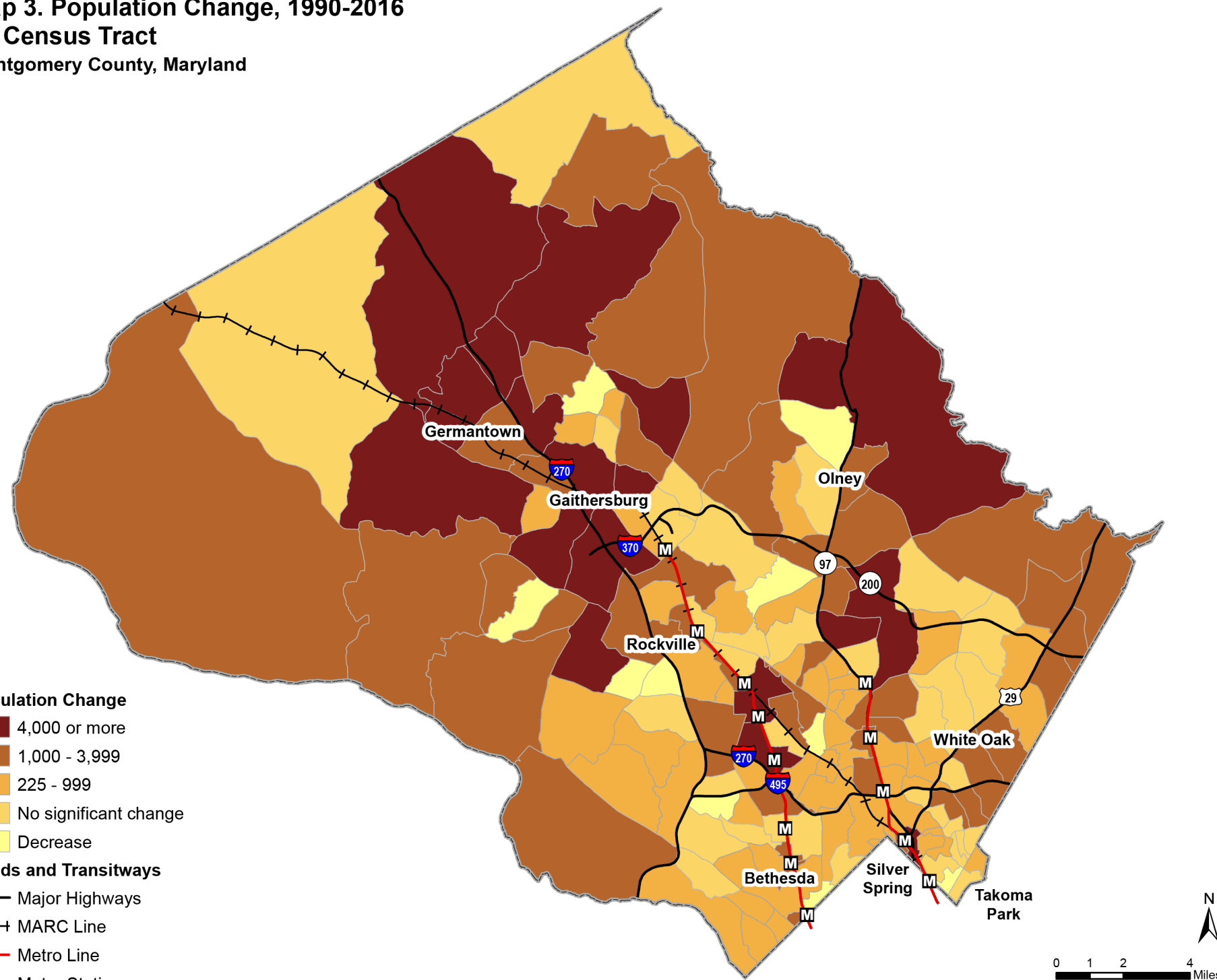**1990: 765,500**   **+293,300**

38% population increase since 1990

Largest county in Maryland

Decreasing gain and rate of growth since 1990

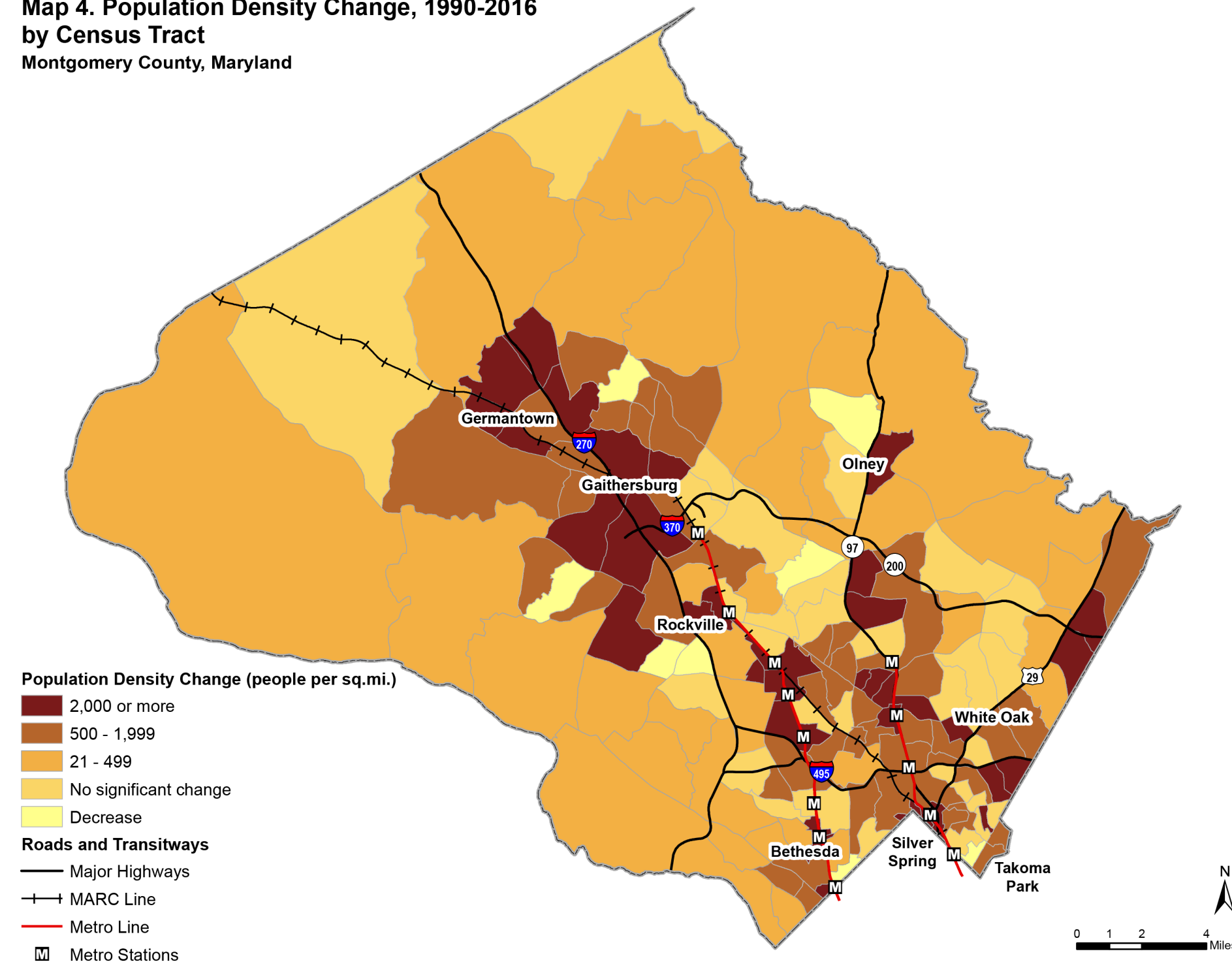■ Absolute Growth   ◆ Percentage Growth

Most of the growth has occurred in outer lying areas and along transit corridors.

Map 3. Population Change, 1990-2016
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
- M Metro Stations

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

Map 4. Population Density Change, 1990-2016
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
- M Metro Stations

Source: 1990 Census and 2012-2016 American Community Survey 5-year estimate, U.S. Census Bureau. Created by: M-NCPPC, Research and Special Projects Division
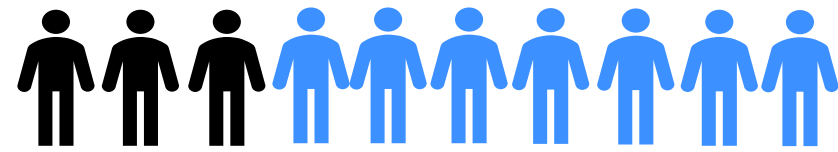
Immigration contributes to significant diversity.

Increasing foreign-born population

2016: 344,645

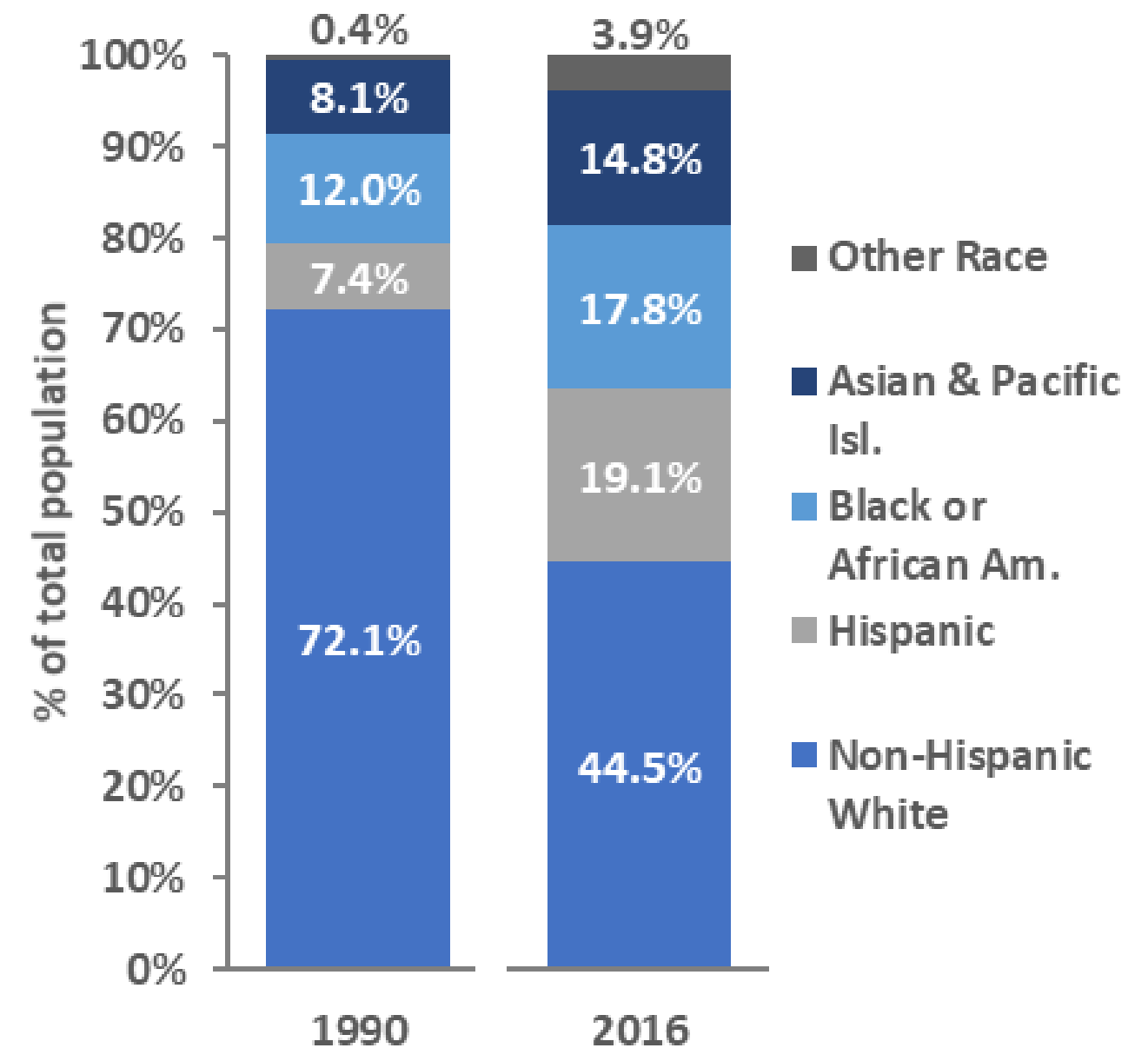1990: 141,166   +203,500 (59%)

Up from 19% in 1990 to 33% in 2016

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

1) El Salvador (47,792, 14%)
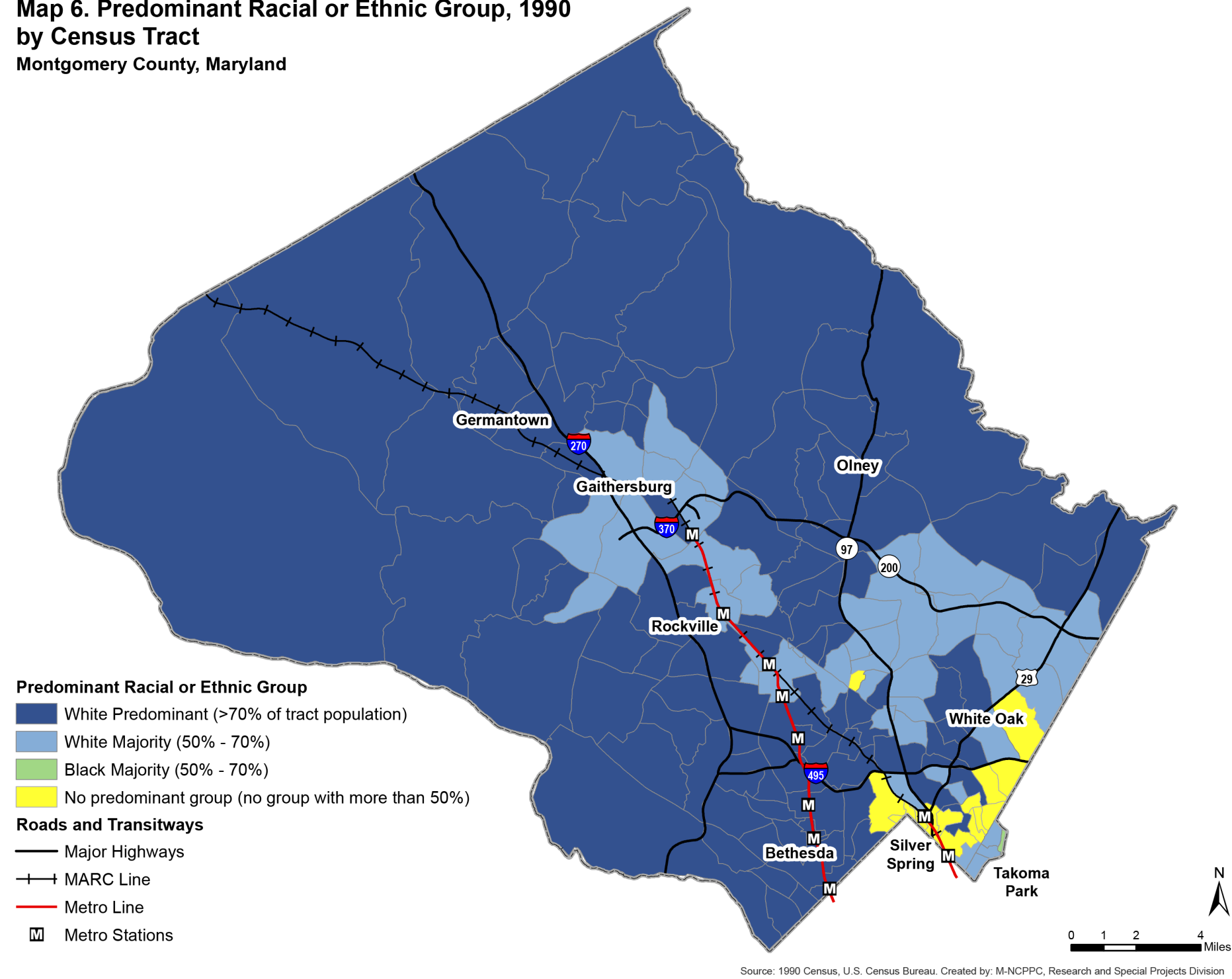2) China (28,243, 8%)
3) India (24,306, 7%)

Greater racial & ethnic diversity

People of Color: 579,397 (56%)

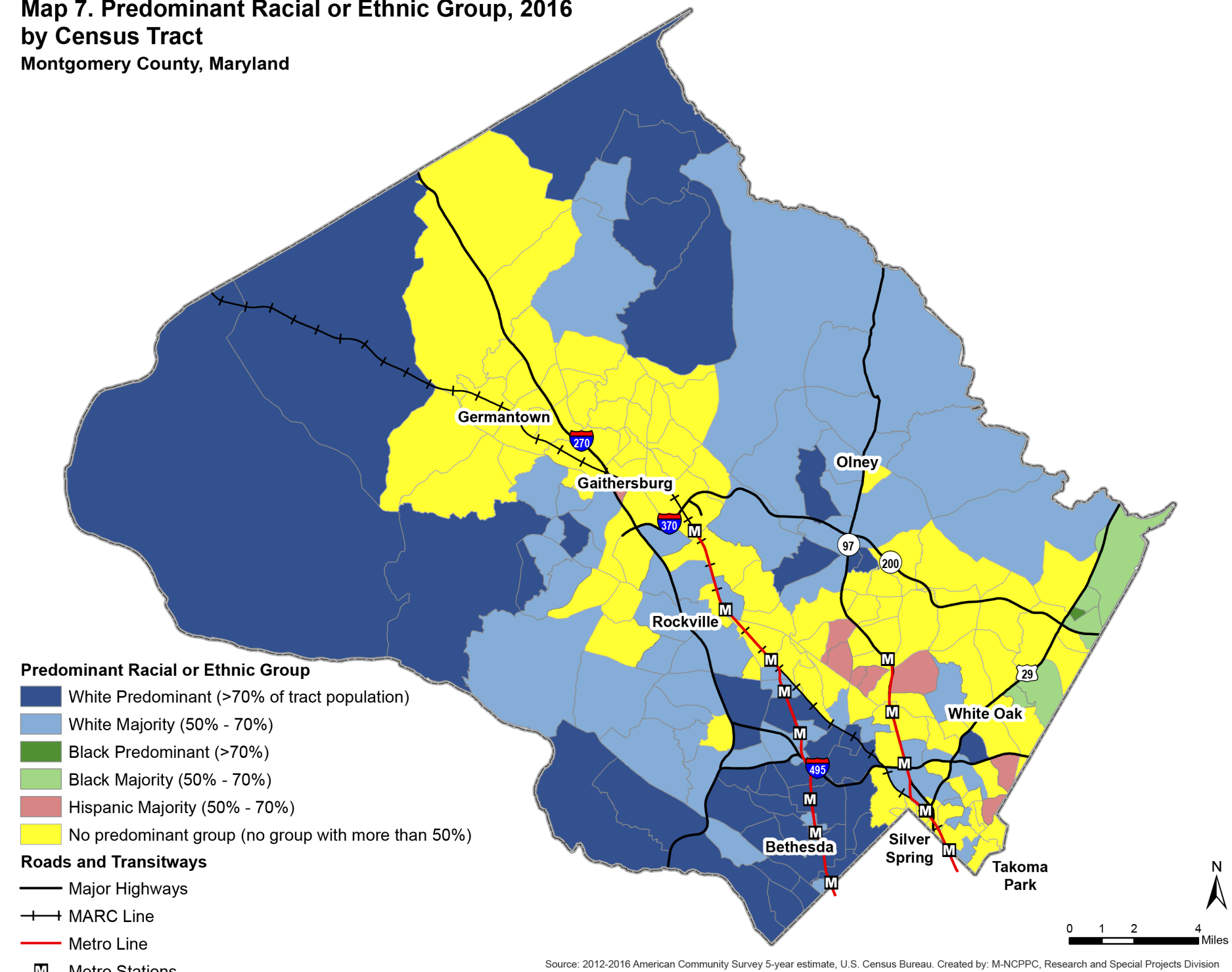| % of total population	1990	2016
Other Race	0.4%	3.9%
Asian & Pacific Isl.	8.1%	14.8%
Black or African Am.	12.0%	17.8%
Hispanic	7.4%	19.1%
Non-Hispanic White	72.1%	44.5%

Racial and ethnic diversity is increasingly distributed across the county.

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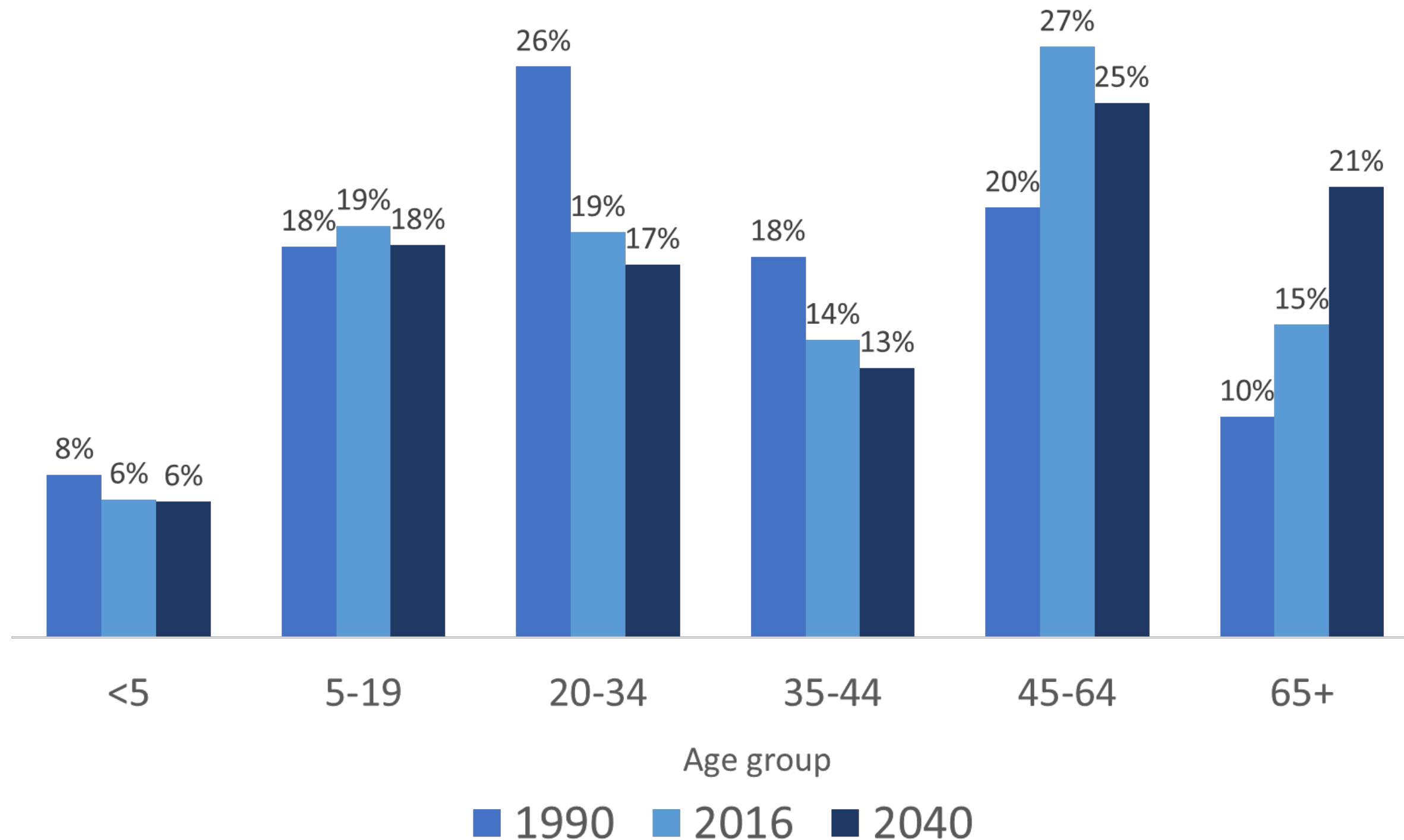Montgomery County, Maryland

Predominant Racial or Ethnic Group
- White Predominant (>70% of tract population)
- White Majority (50% - 70%)
- Black Majority (50% - 70%)
- No predominant group (no group with more than 50%)

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

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

Predominant Racial or Ethnic Group
- White Predominant (>70% of tract population)
- White Majority (50% - 70%)
- Black Predominant (>70%)
- Black Majority (50% - 70%)
- Hispanic Majority (50% - 70%)
- No predominant group (no group with more than 50%)

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

Source: 2012-2016 American Community Survey 5-year estimate, U.S. Census Bureau. Created by: M-NCPPC, Research and Special Projects Division
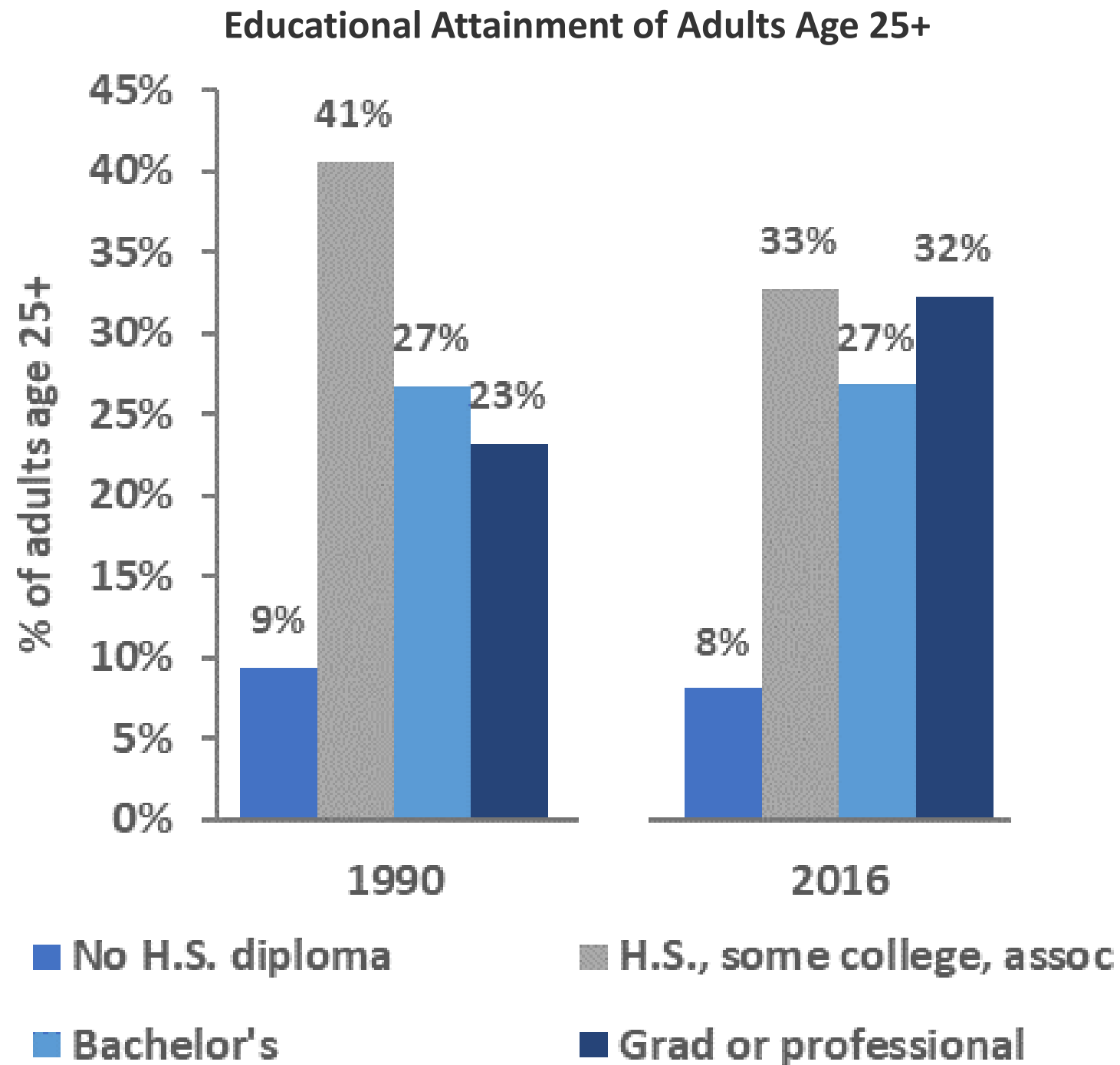
Driven by the baby boomers, the population is aging.

Percentage of Population by Age Group

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

Legend: 1990, 2016, 2040

Montgomery County remains highly educated.

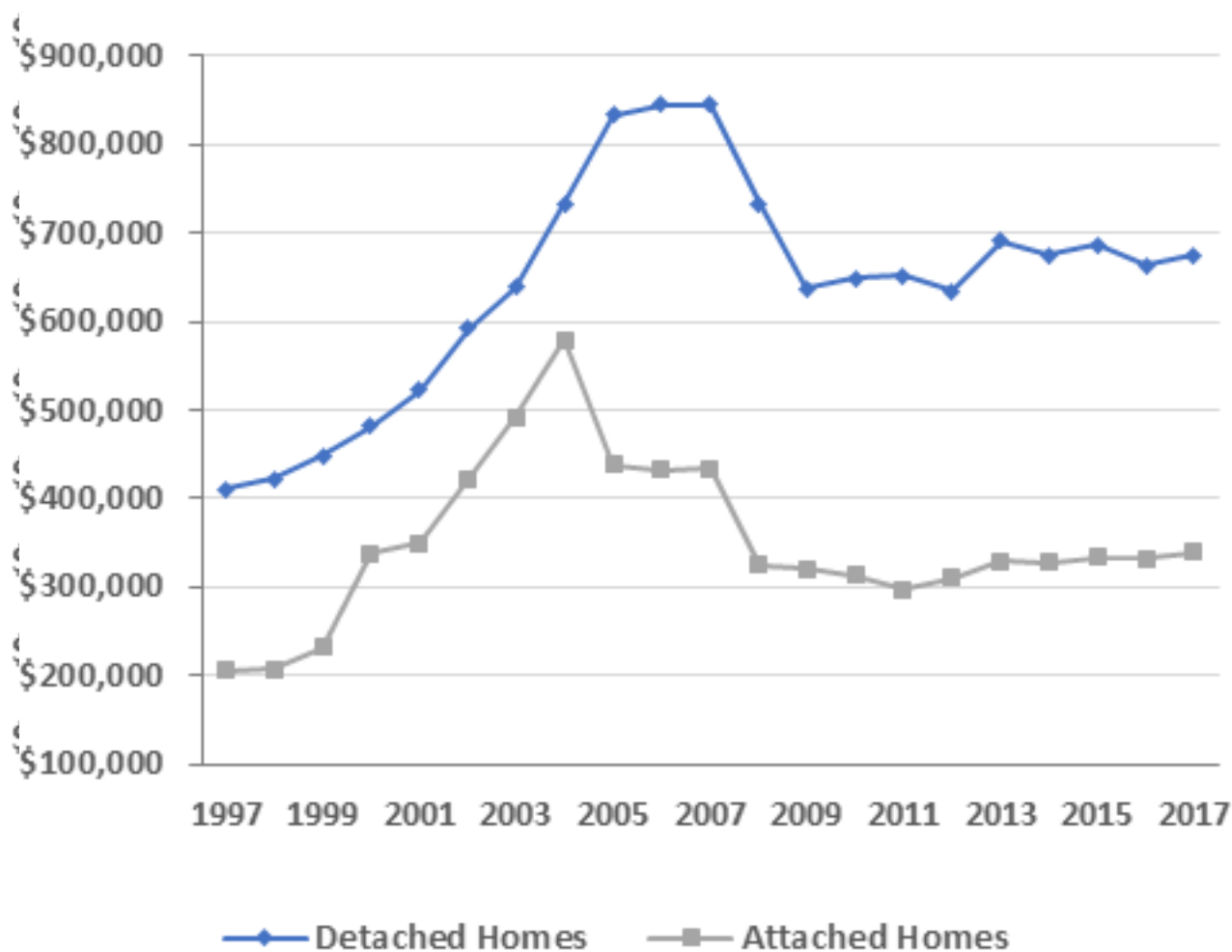**Educational Attainment of Adults Age 25+**
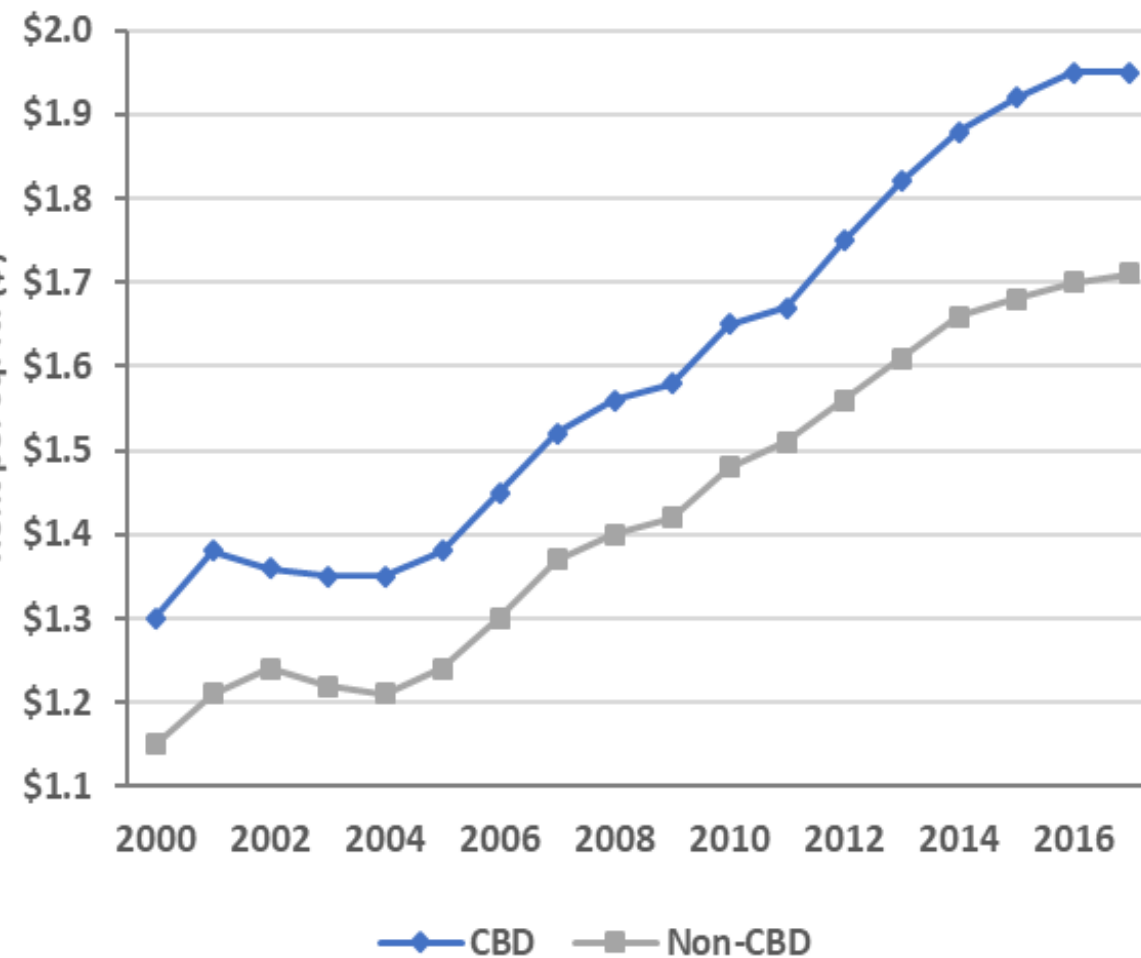

Highly educated adult residents:

- 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

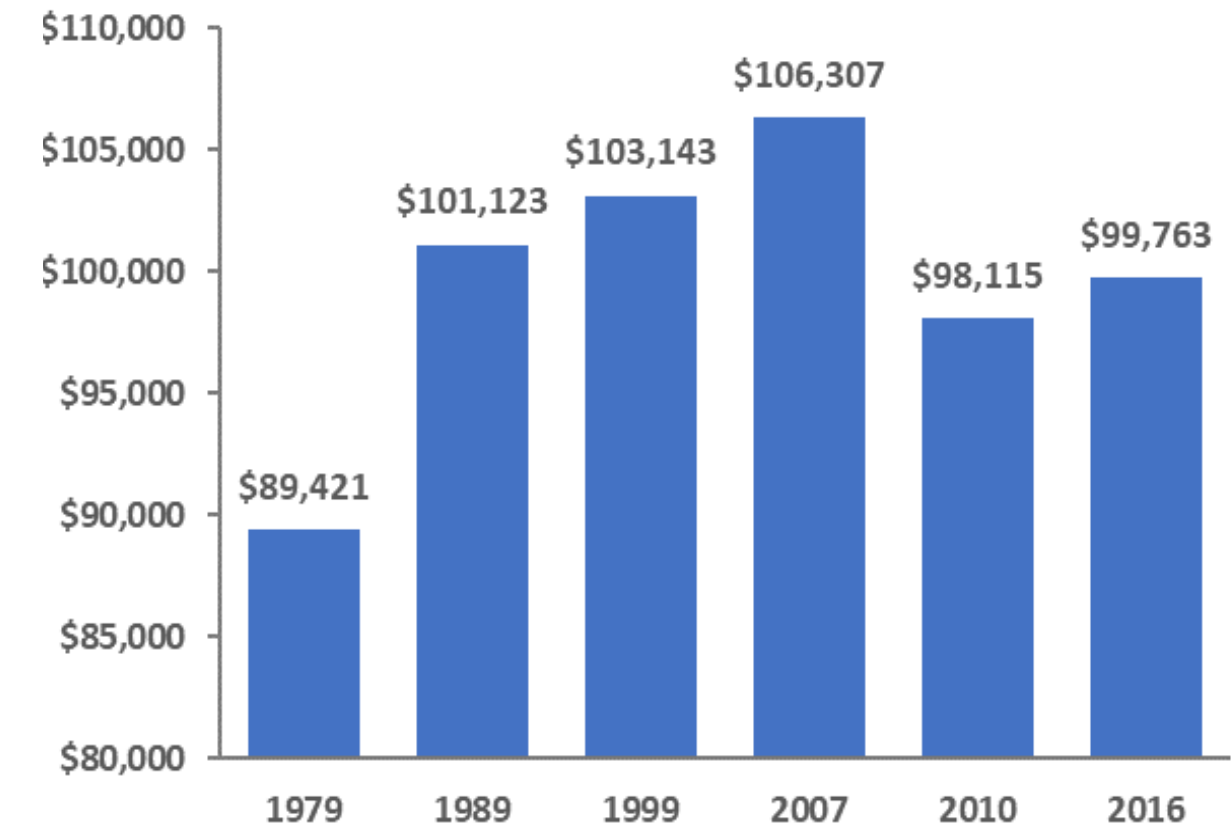# Increases in housing prices have outpaced income growth.

Average Sale Price
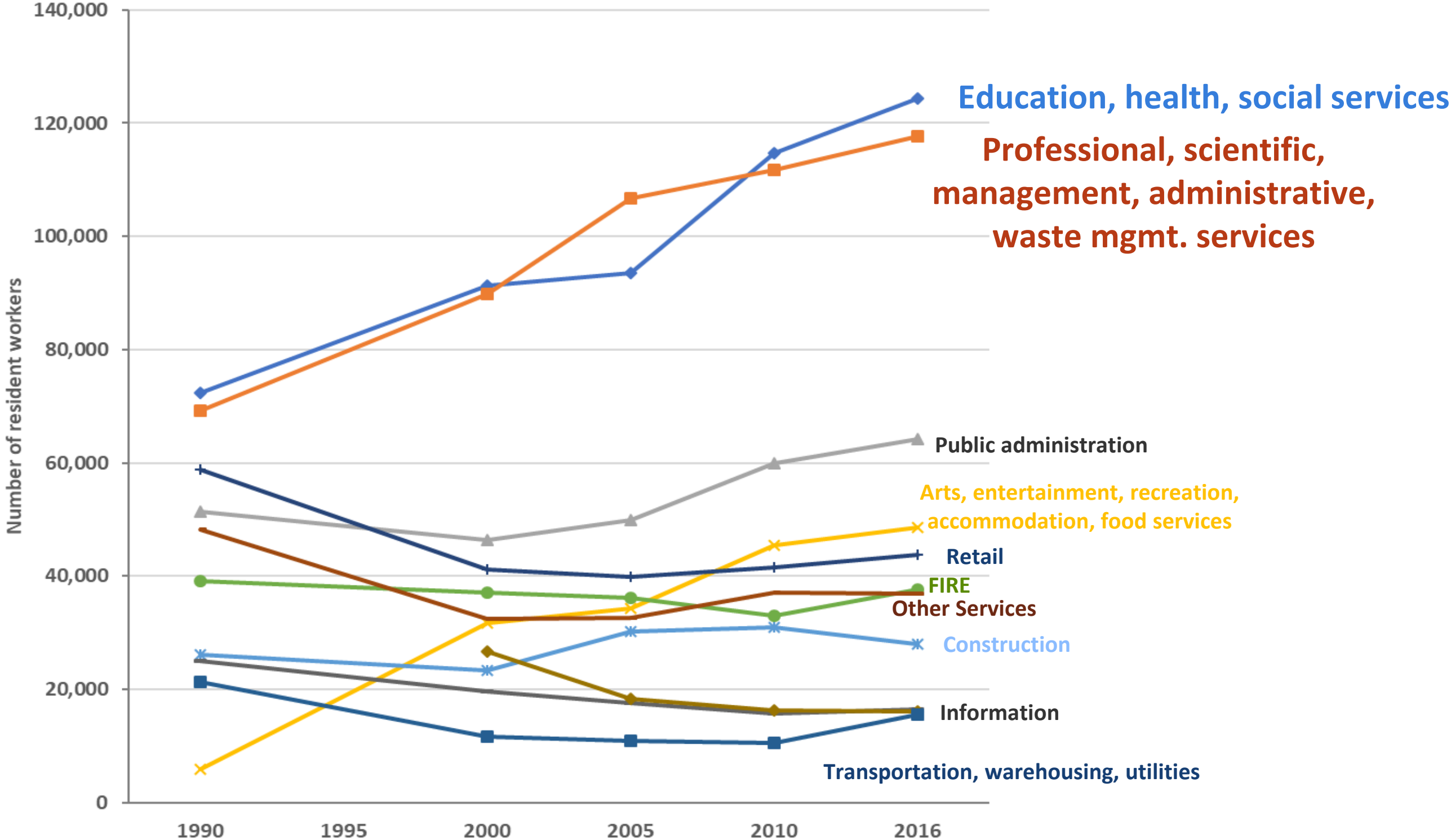
Average Rent PSF

Median Income

All dollar values adjusted for inflation

The top two industries employed 40% of residents in 2016, compared to 33% in 1990.
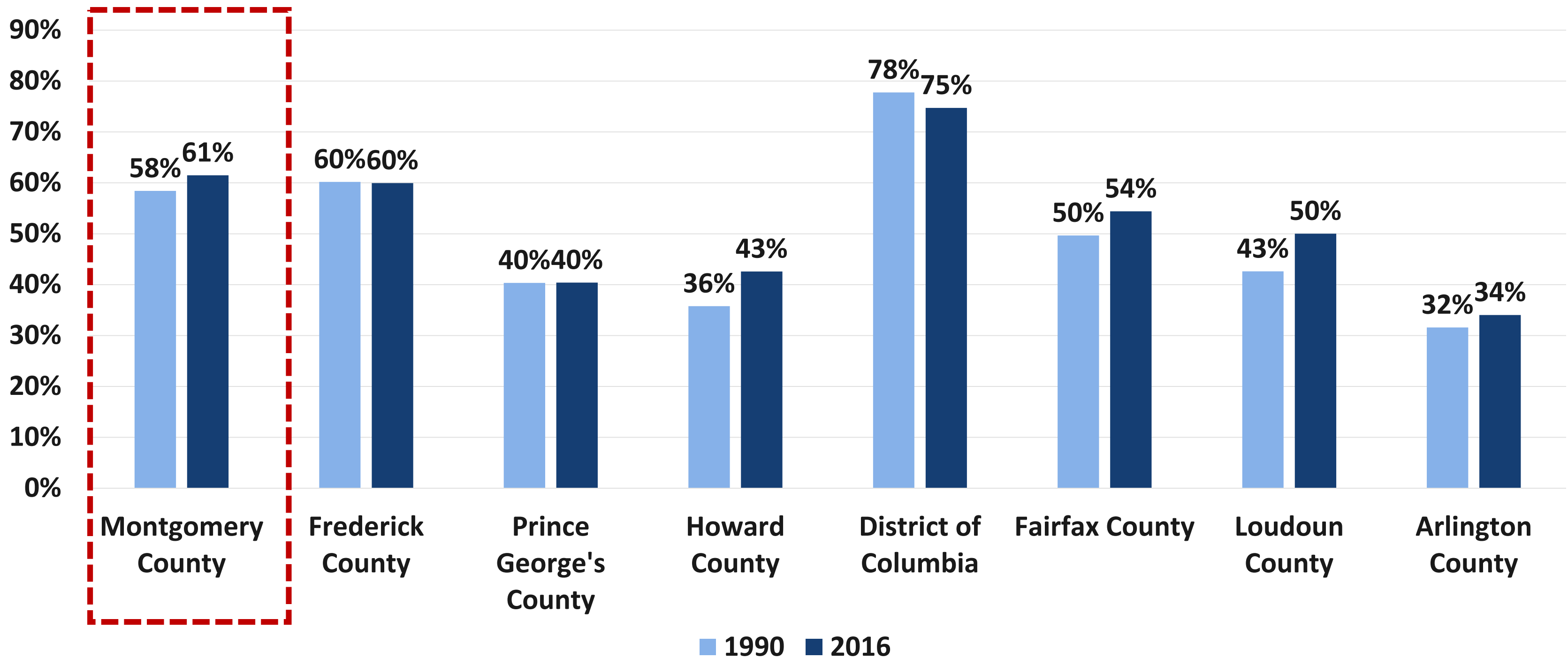
Resident employment, by industry

600,000 residents in the workforce

2nd largest workforce in the region

Number of resident workers

- Education, health, social services
- Professional, scientific, management, administrative, waste mgmt. services
- Public administration
- Arts, entertainment, recreation, accommodation, food services
- Retail
- FIRE
- Other Services
- Construction
- Information
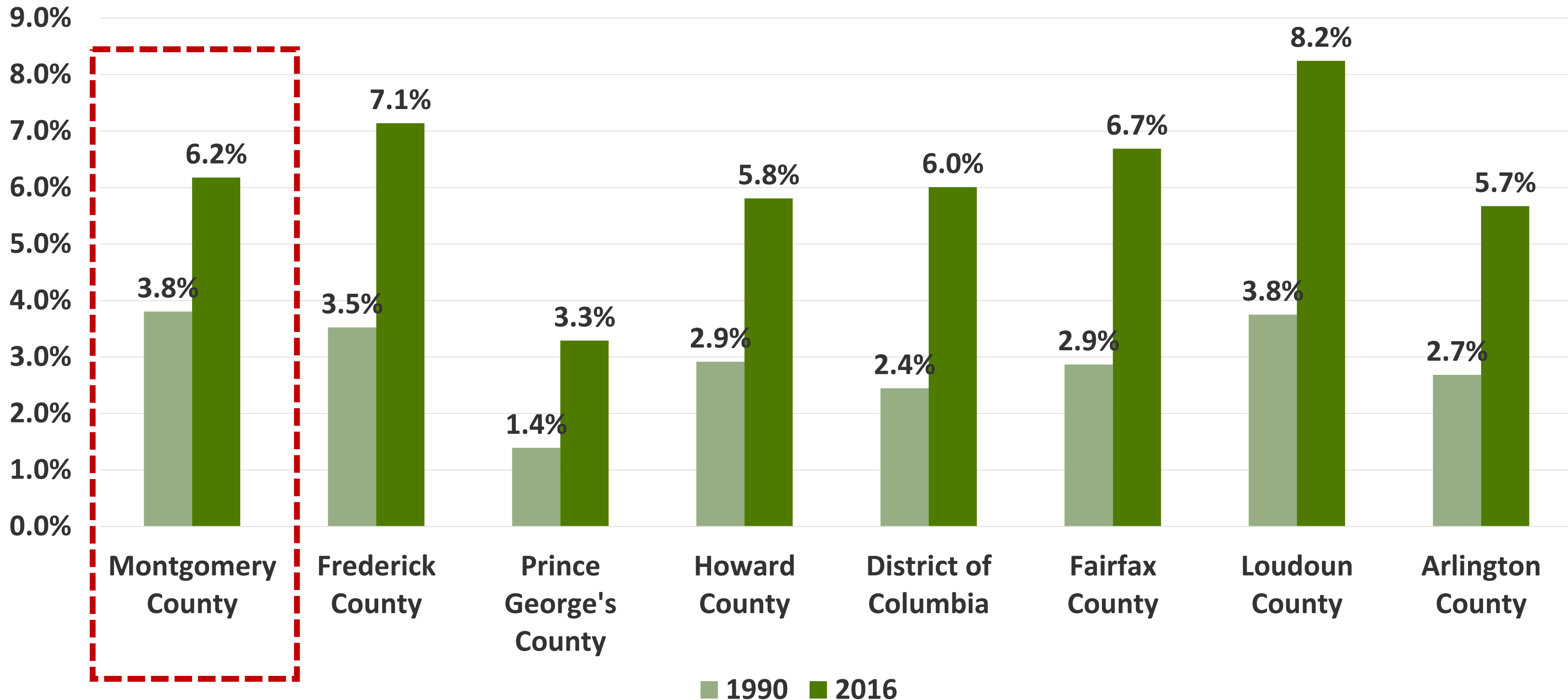- Transportation, warehousing, utilities

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.
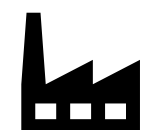
Percentage of resident workers who work at home

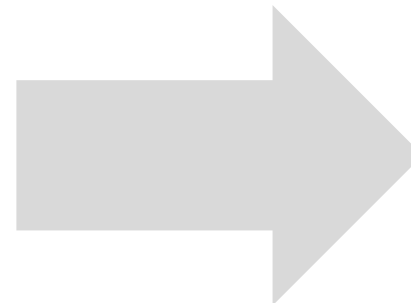|	1990	2016
Montgomery County	3.8%	6.2%
Frederick County	3.5%	7.1%
Prince George's County	1.4%	3.3%
Howard County	2.9%	5.8%
District of Columbia	2.4%	6.0%
Fairfax County	2.9%	6.7%
Loudoun County	3.8%	8.2%
Arlington County	2.7%	5.7%

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

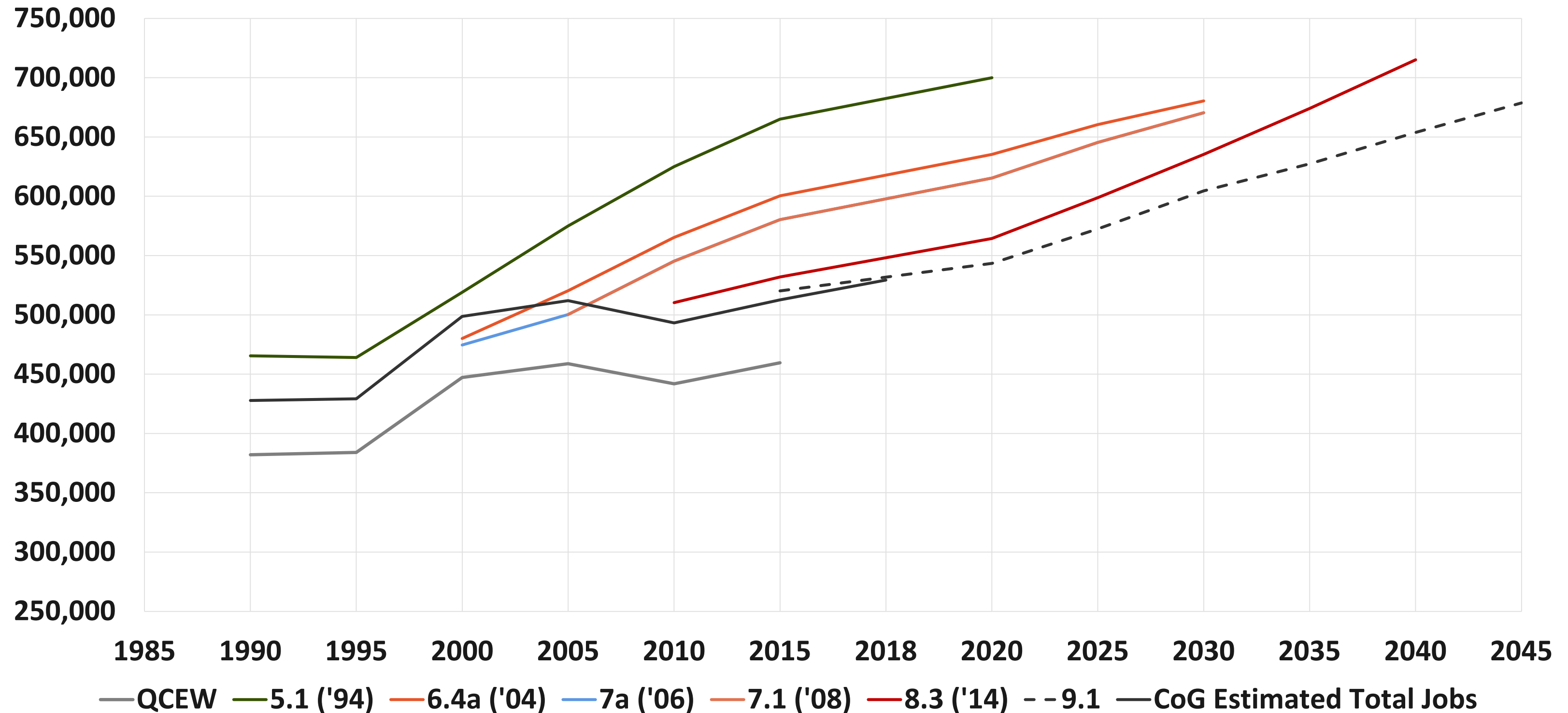Professional, scientific and technical services is the largest at 65,000

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

Legend: QCEW — 5.1 ('94) — 6.4a ('04) — 7a ('06) — 7.1 ('08) — 8.3 ('14) – – 9.1 — CoG Estimated Total Jobs

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 **re**development

THANK YOU!

Casey Anderson, Planning Board Chair

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