

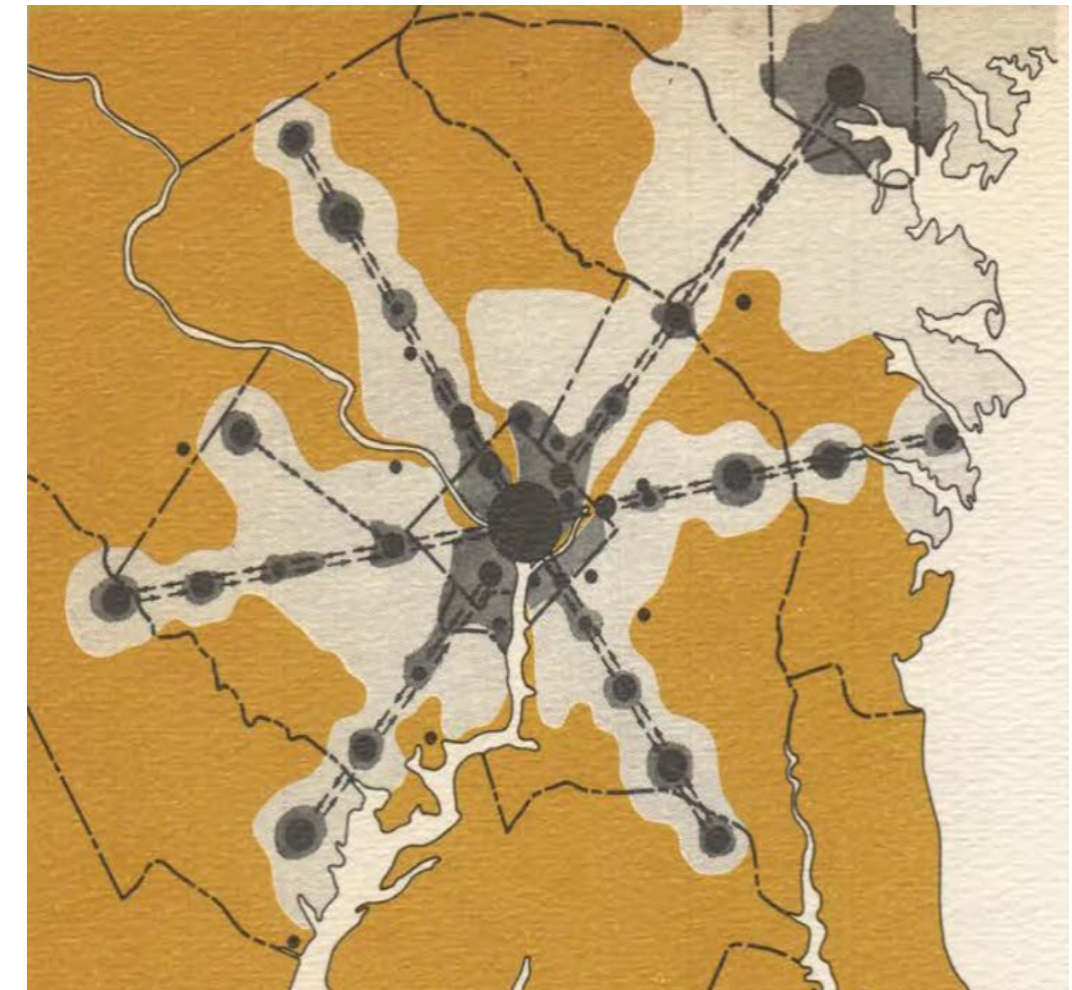
Trends in Montgomery County: *A Look at People, Housing, and Jobs Since 1990*

April 23, 2019

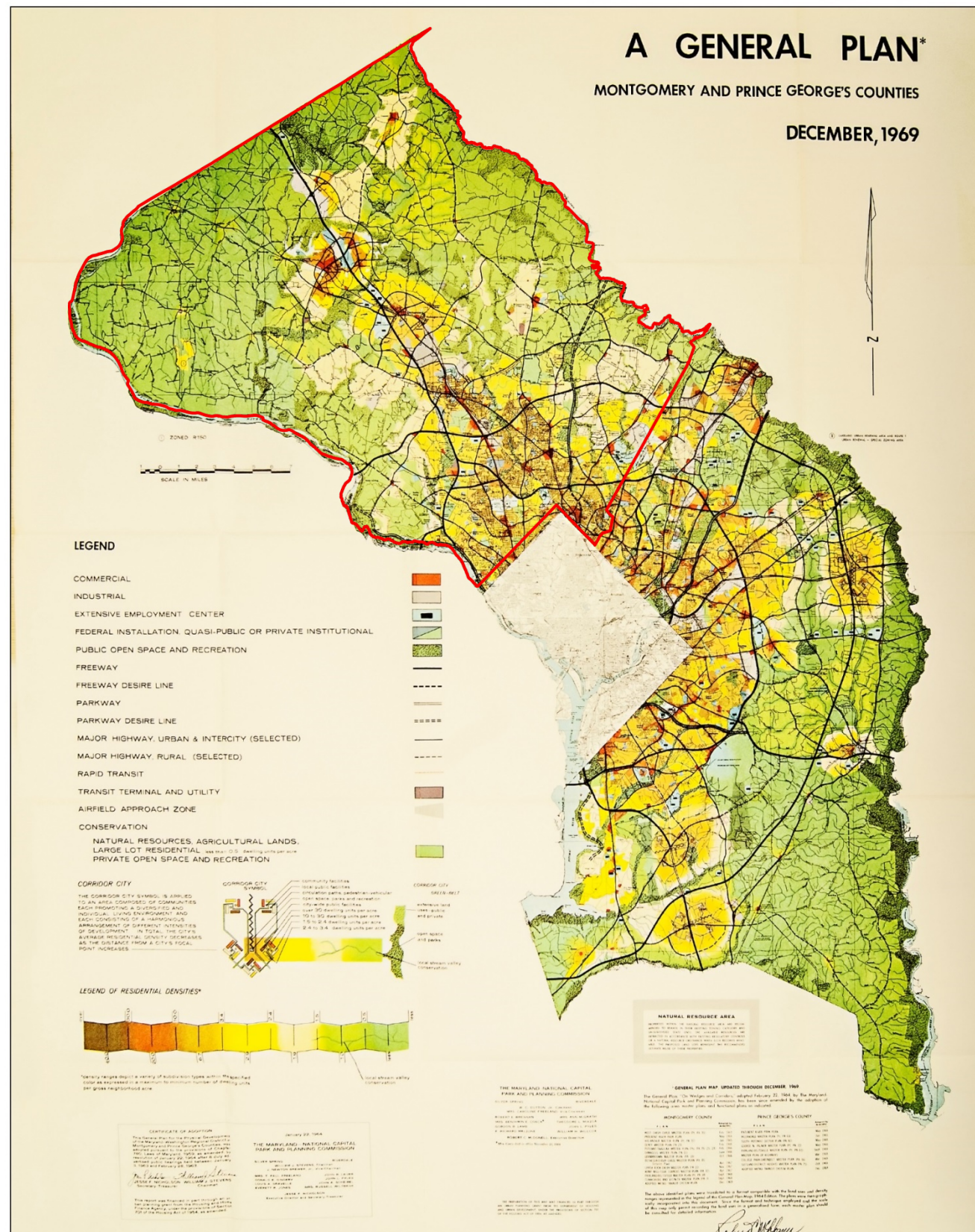
RESEARCH + SPECIAL PROJECTS
A DIVISION OF THE MONTGOMERY COUNTY PLANNING DEPARTMENT



1964 General Plan “...on Wedges and Corridors”



1969 General Plan and its Implementation



Increase Affordable Housing



MPDU Law

Protect Farmland



TDRs

Guide Timely Infrastructure



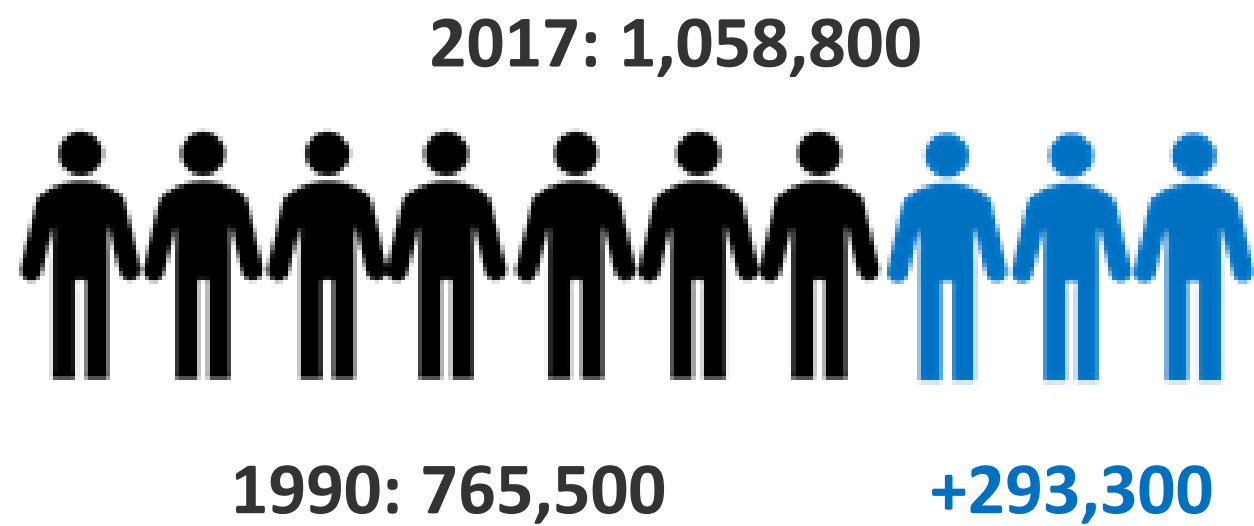
APFO

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**

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

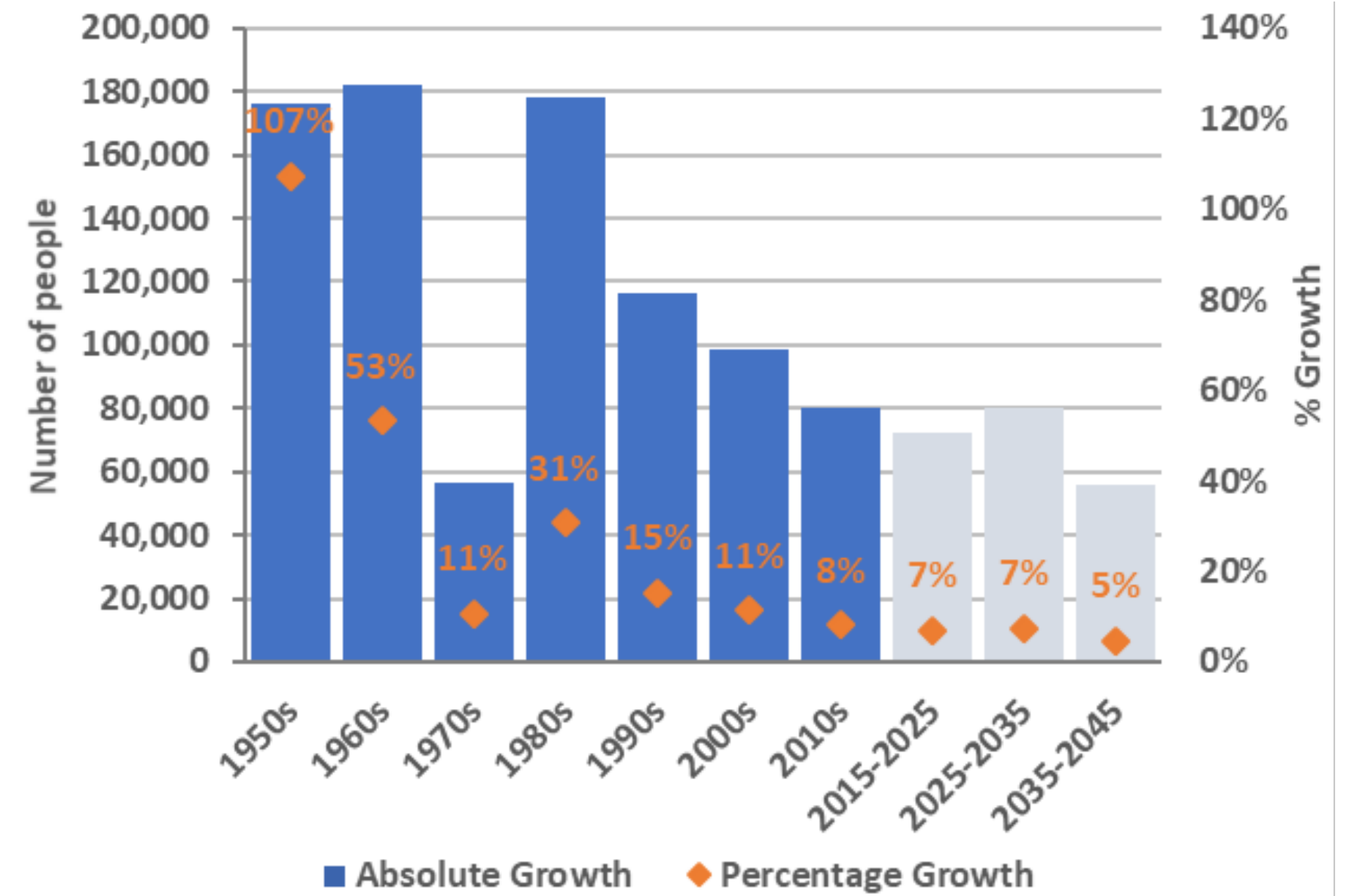
Million-plus population since 2012



38% population increase since 1990

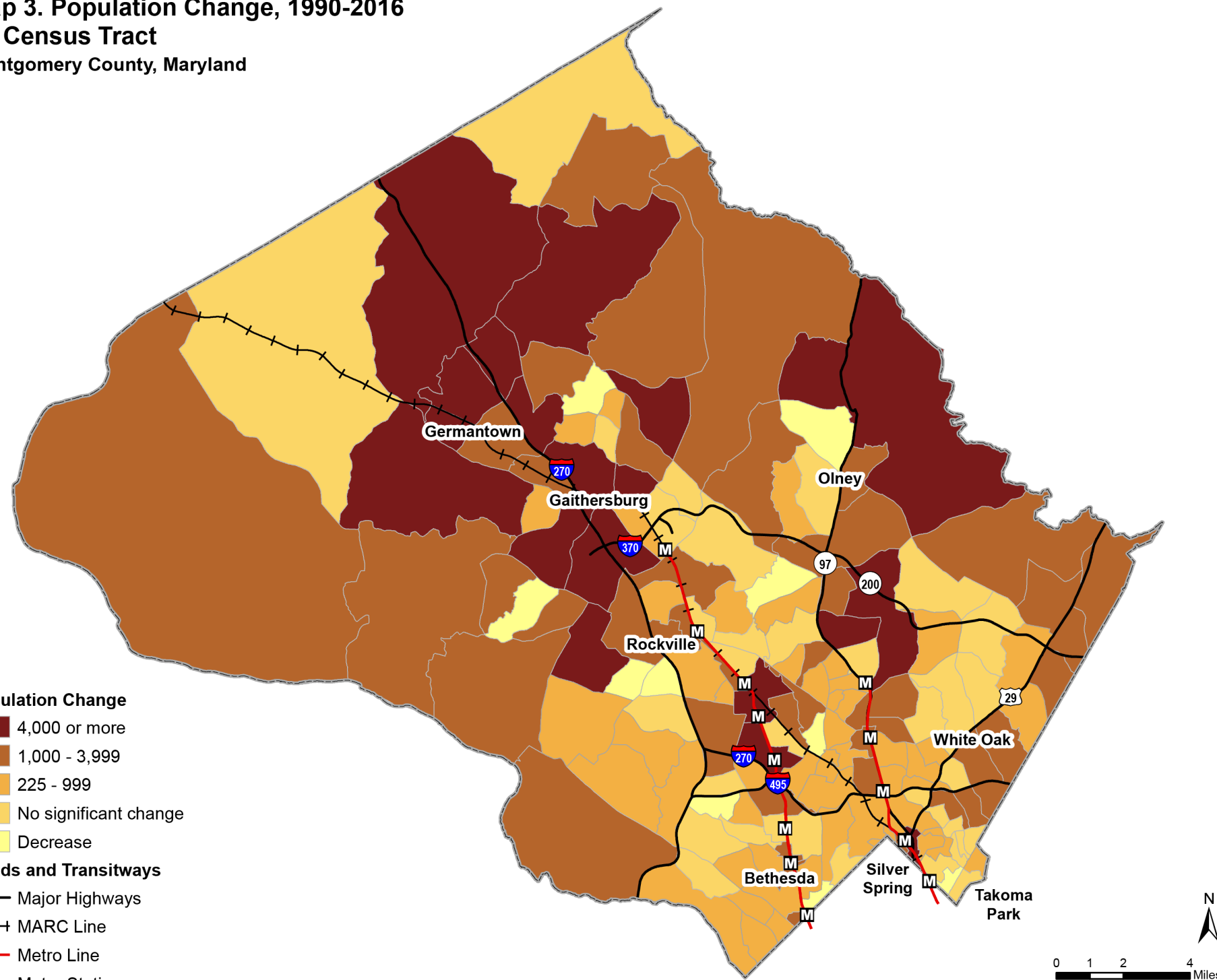
Largest county in Maryland

Decreasing gain and rate of growth since 1990

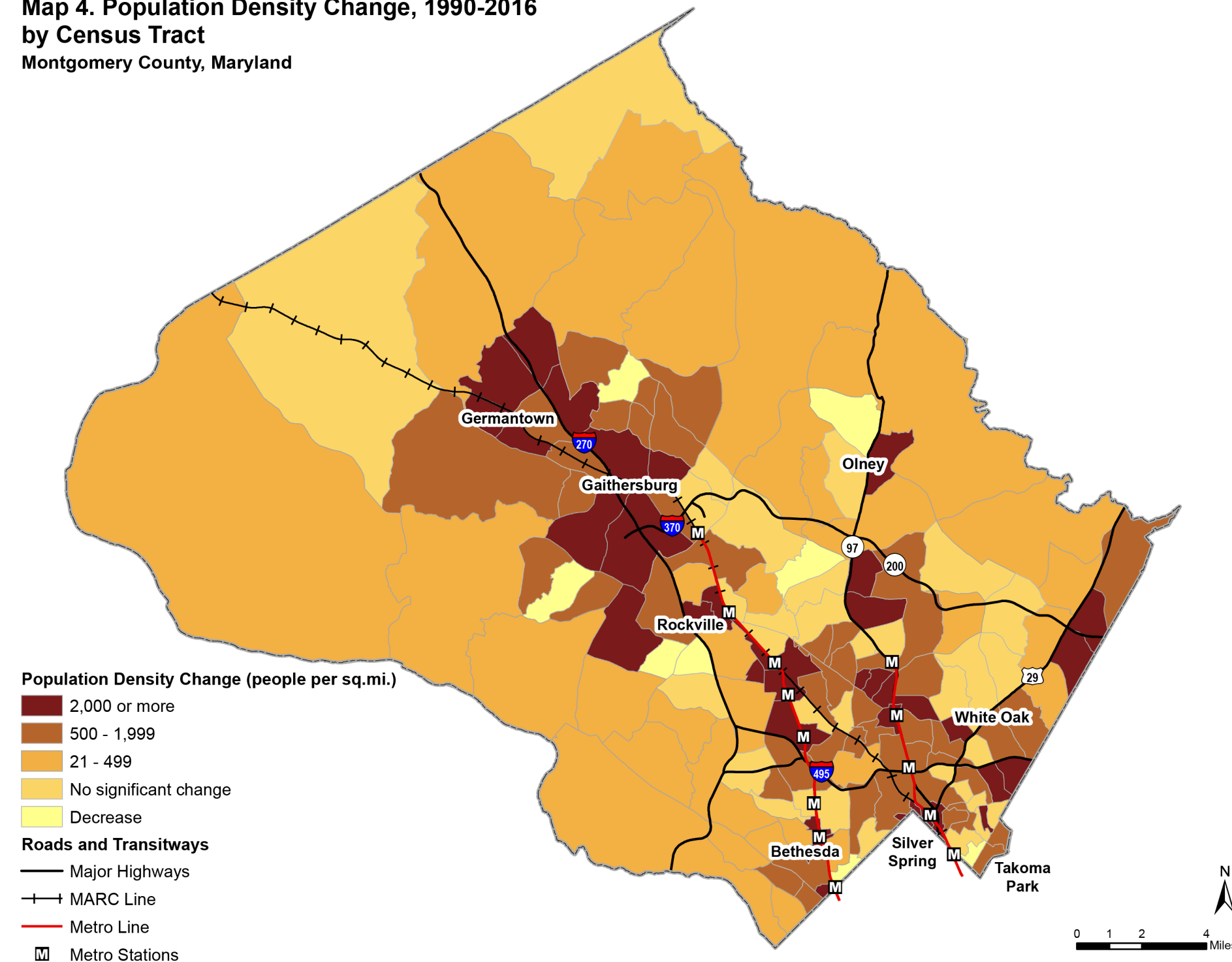


Most of the growth has occurred in outer lying areas and along transit corridors.

Map 3. Population Change, 1990-2016 by Census Tract
Montgomery County, Maryland



Map 4. Population Density Change, 1990-2016 by Census Tract
Montgomery County, Maryland

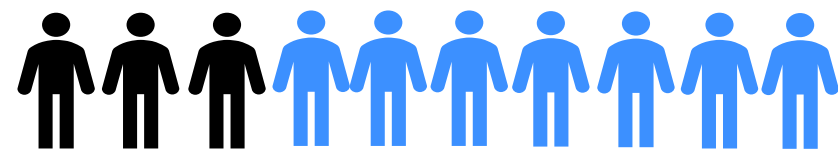


Immigration contributes to significant diversity.



Increasing foreign-born population

2016: 344,645



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



Up from 19% in 1990 to 33% in 2016



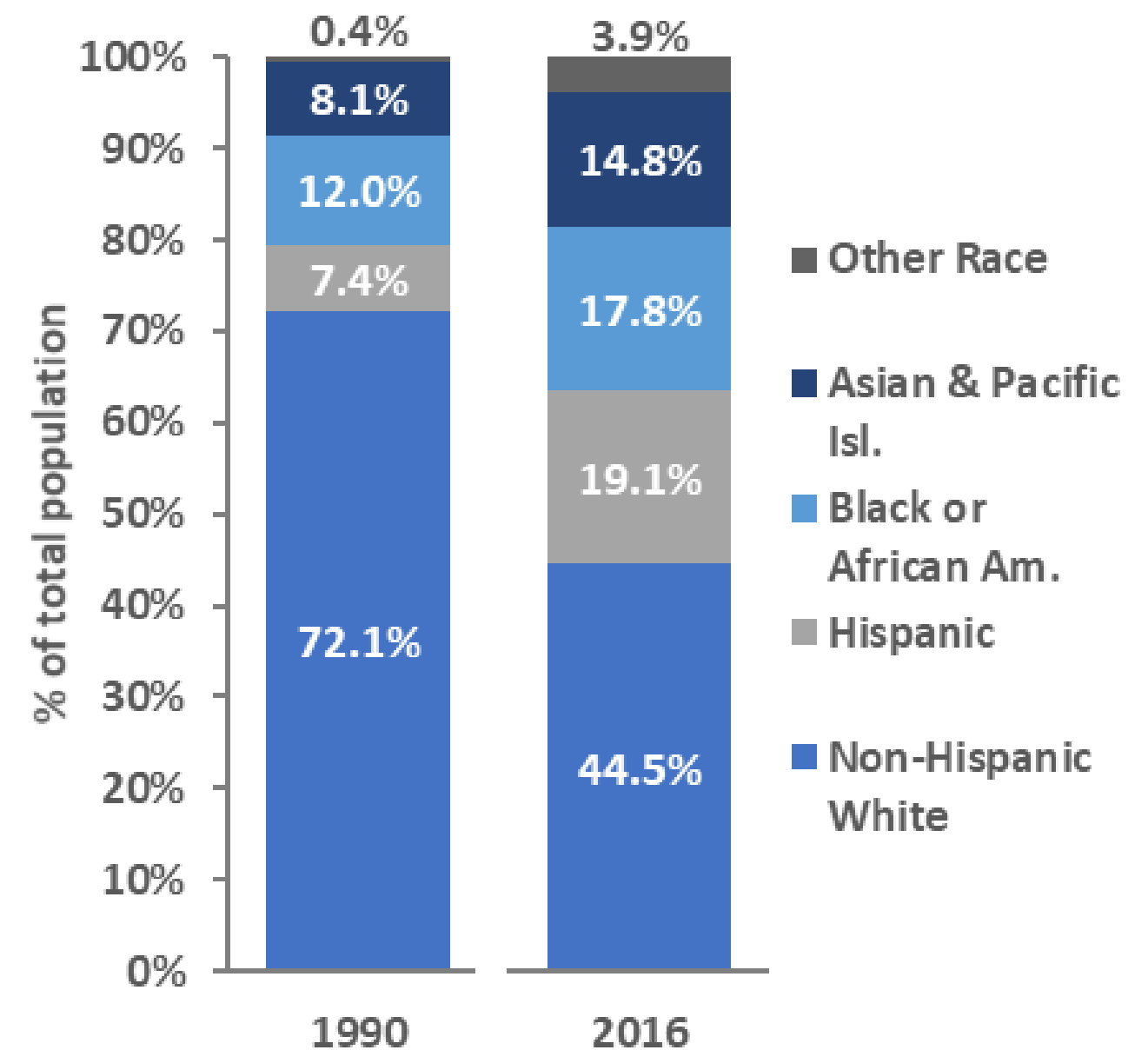
Majority from Latin America (37%) & Asia (37%)

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



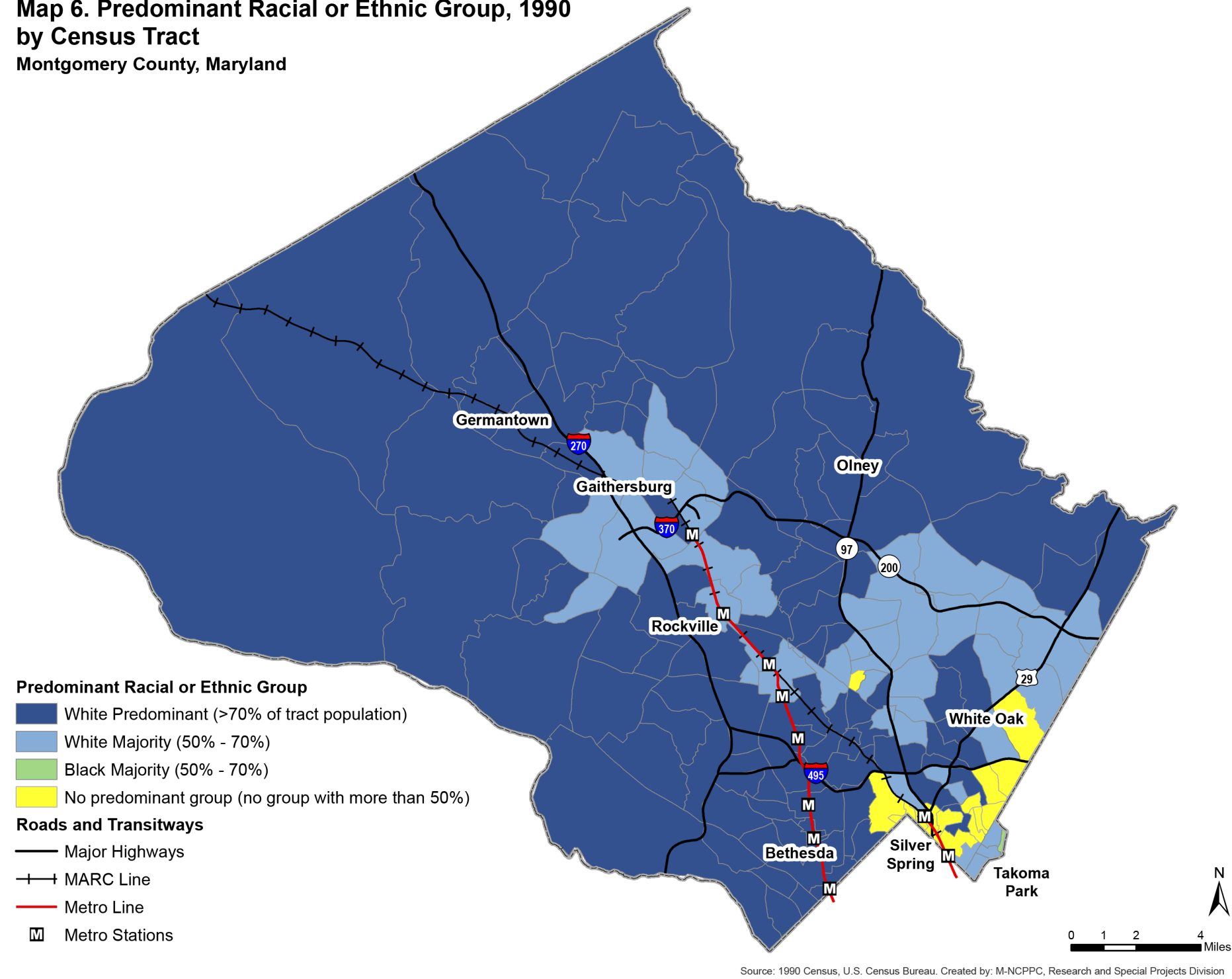
Greater racial & ethnic diversity

People of Color: 579,397 (56%)

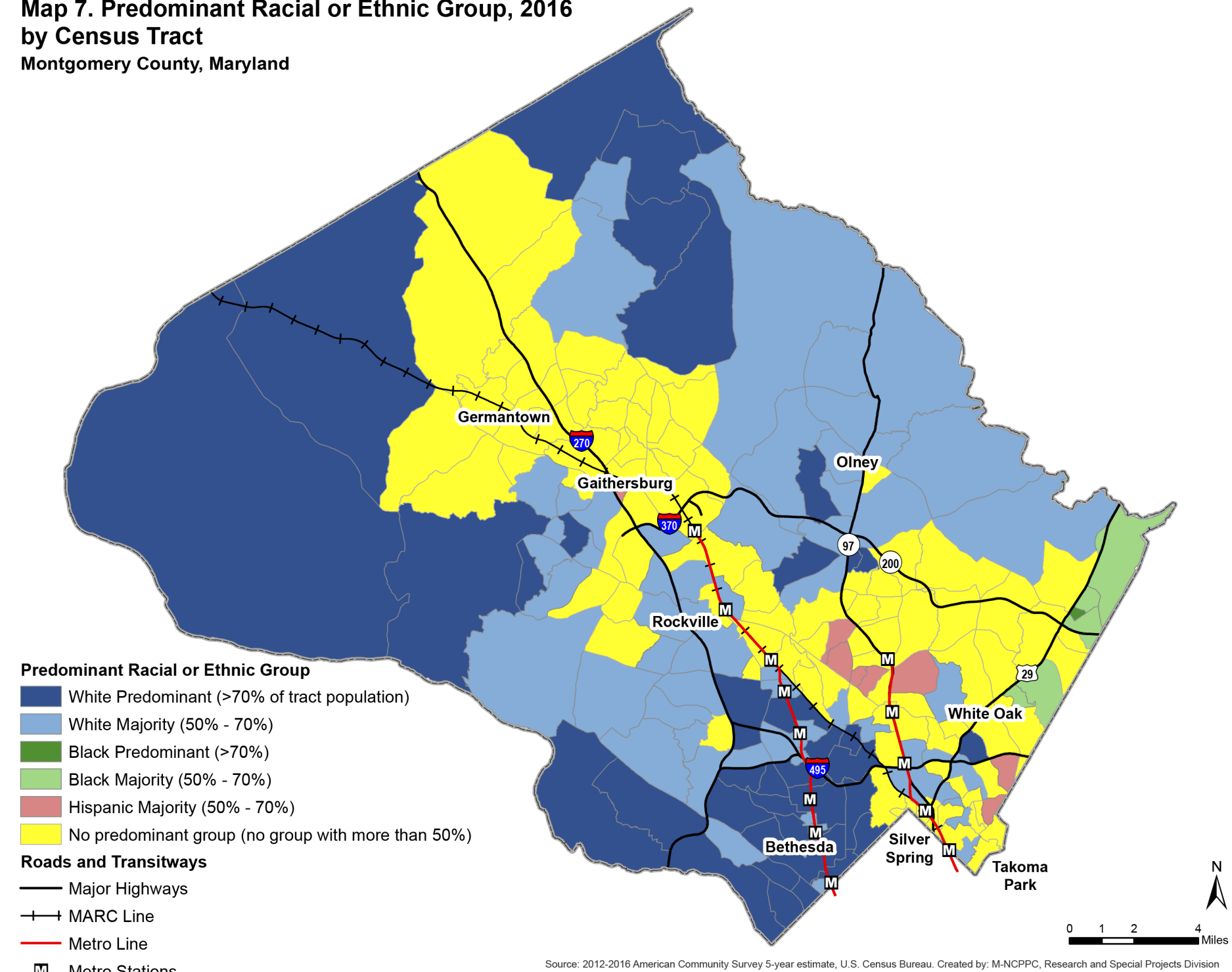


Racial and ethnic diversity is increasingly distributed across the county.

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

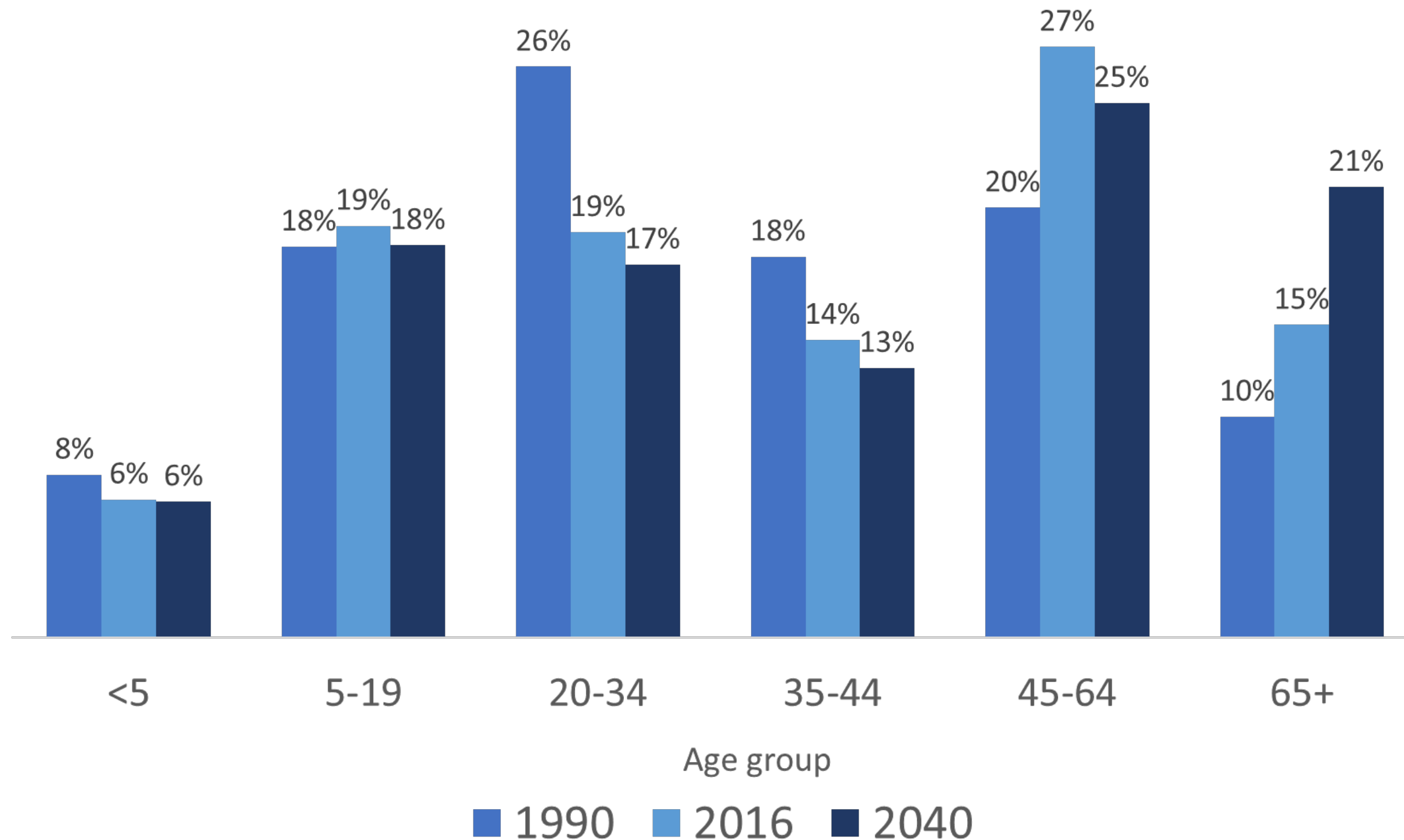


Map 7. Predominant Racial or Ethnic Group, 2016 by Census Tract
Montgomery County, Maryland



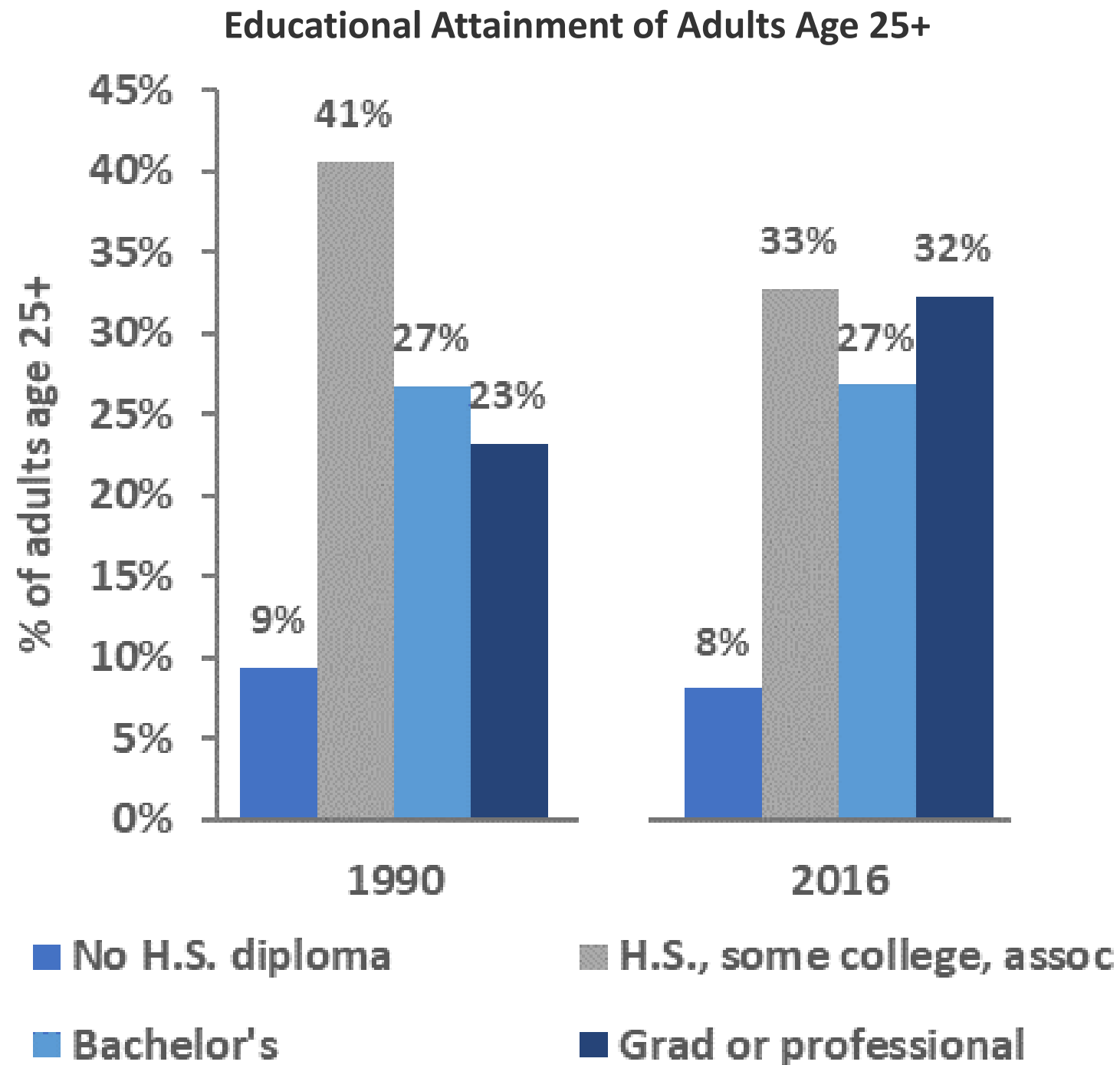
Driven by the baby boomers, the population is aging.

Percentage of Population by Age Group



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

Montgomery County remains highly educated.

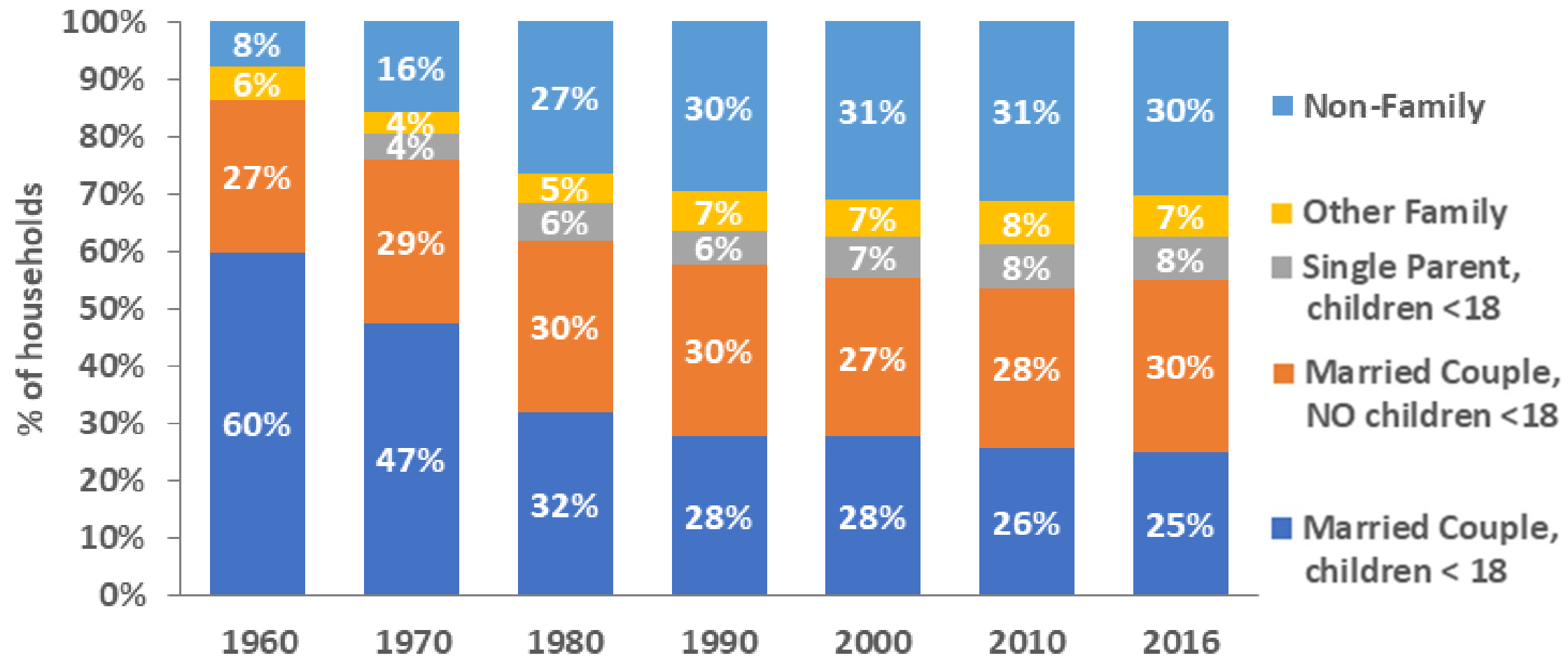


Highly educated adult residents:

- 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

Types of households stabilize after 1990

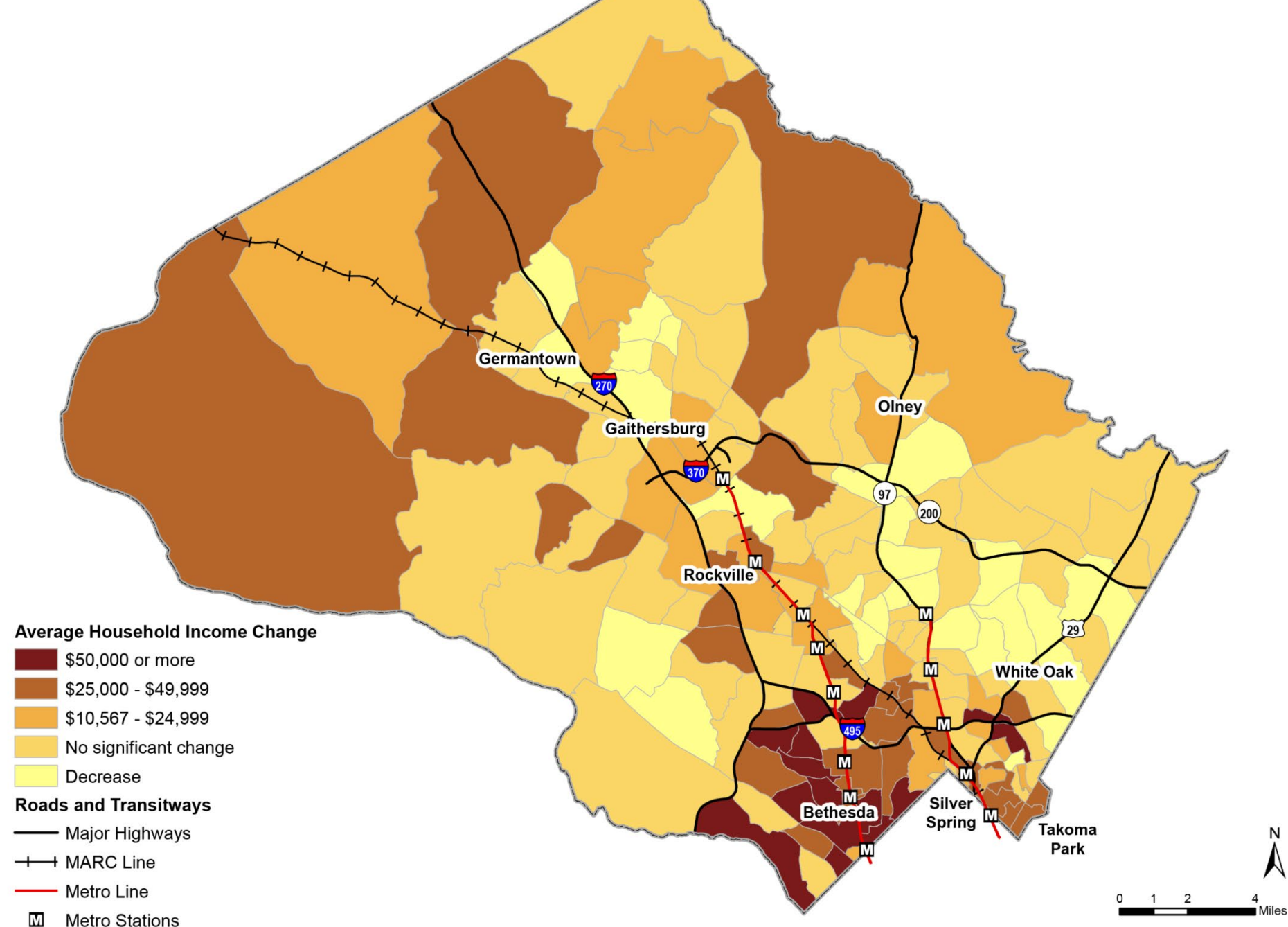
**Wider variety of household types since 1960,
but distribution relatively stable since 1990**



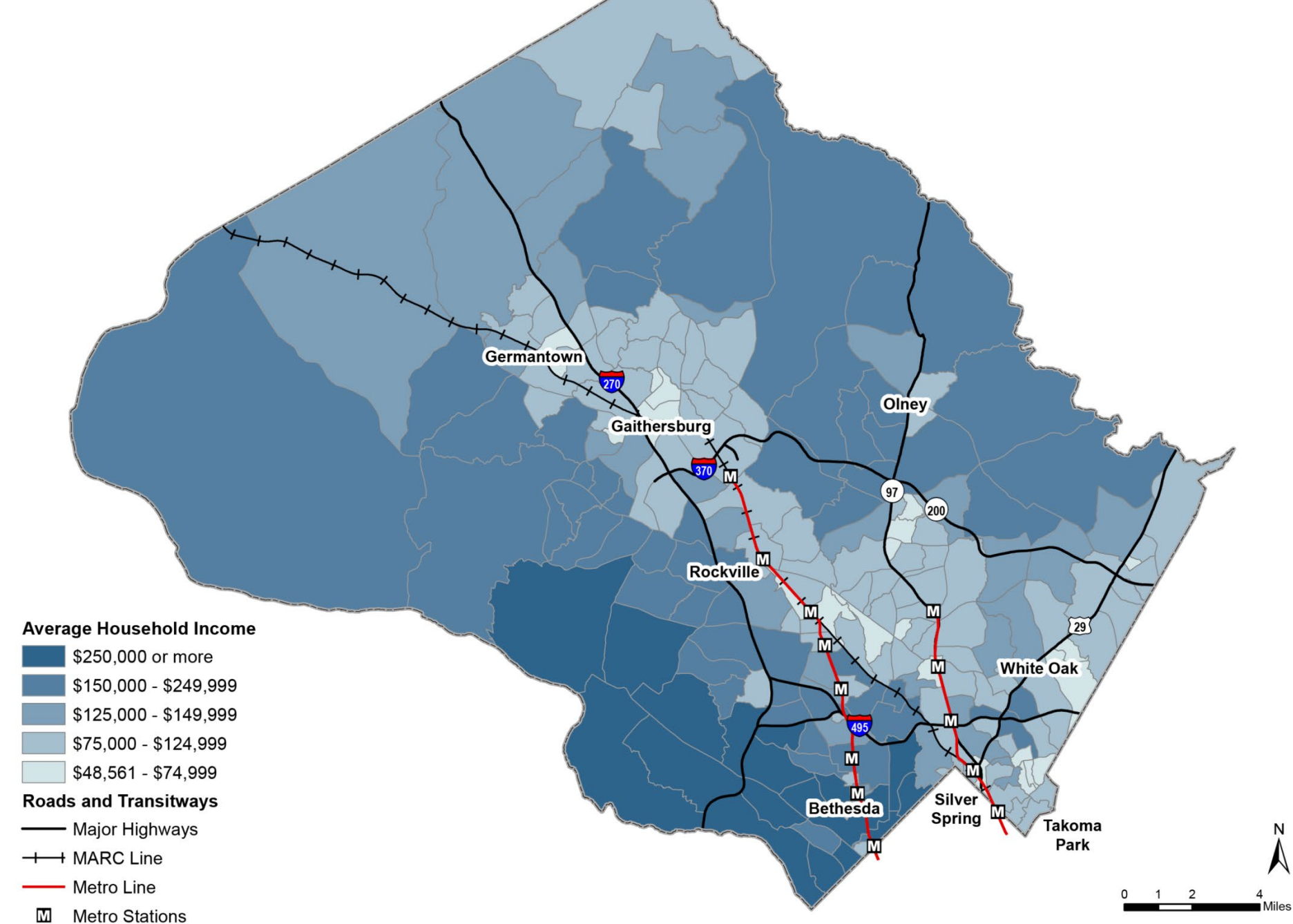
- **Non-family households are the most common household type since 2000**
- **Since 1990, married-couples with children < 18 are less common than:**
 - Married-couples with NO children < 18
 - Non-family households

Change in household income from 1990 to 2016

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

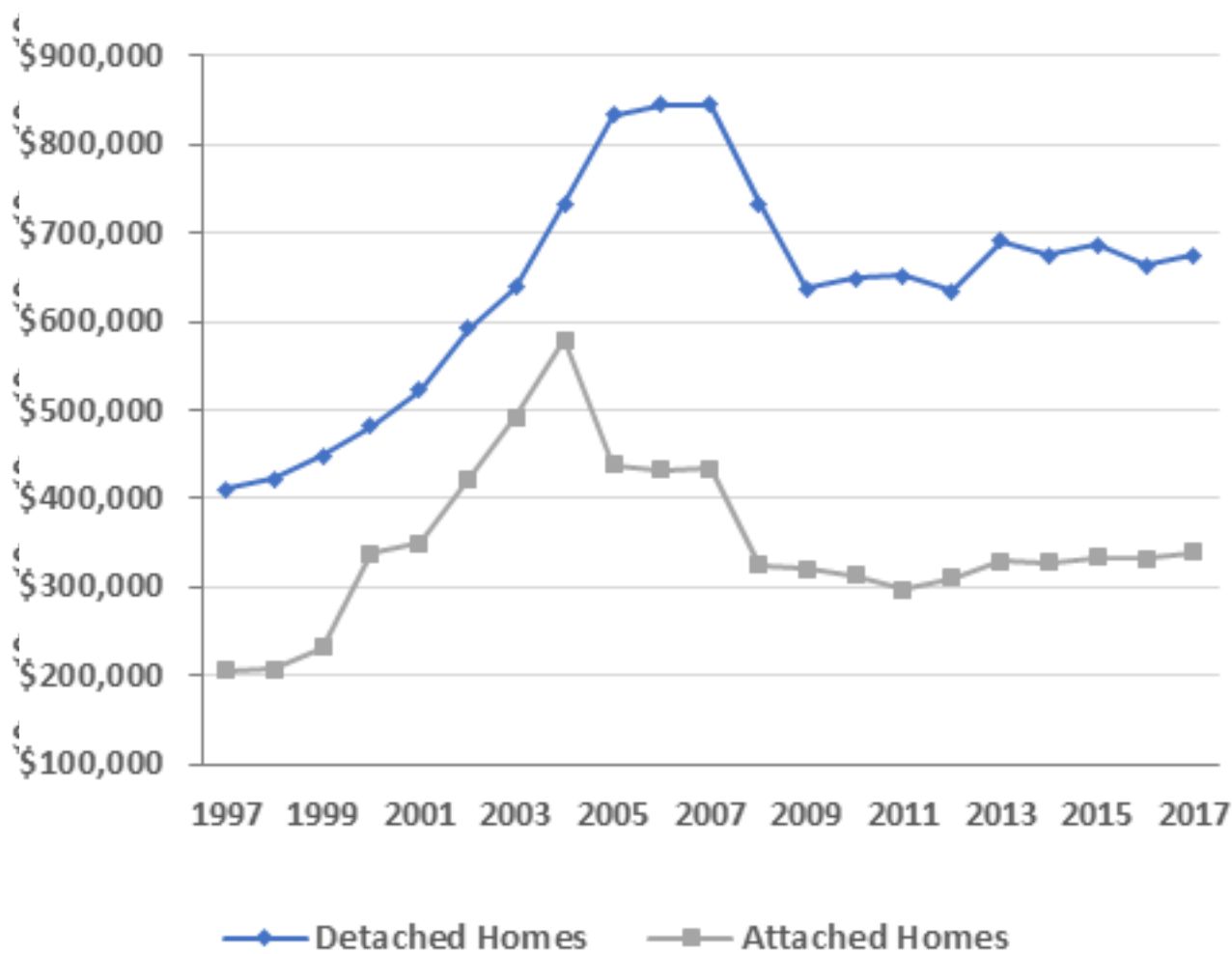


Map 11. Average Household Income, 2016 by Census Tract
Montgomery County, Maryland

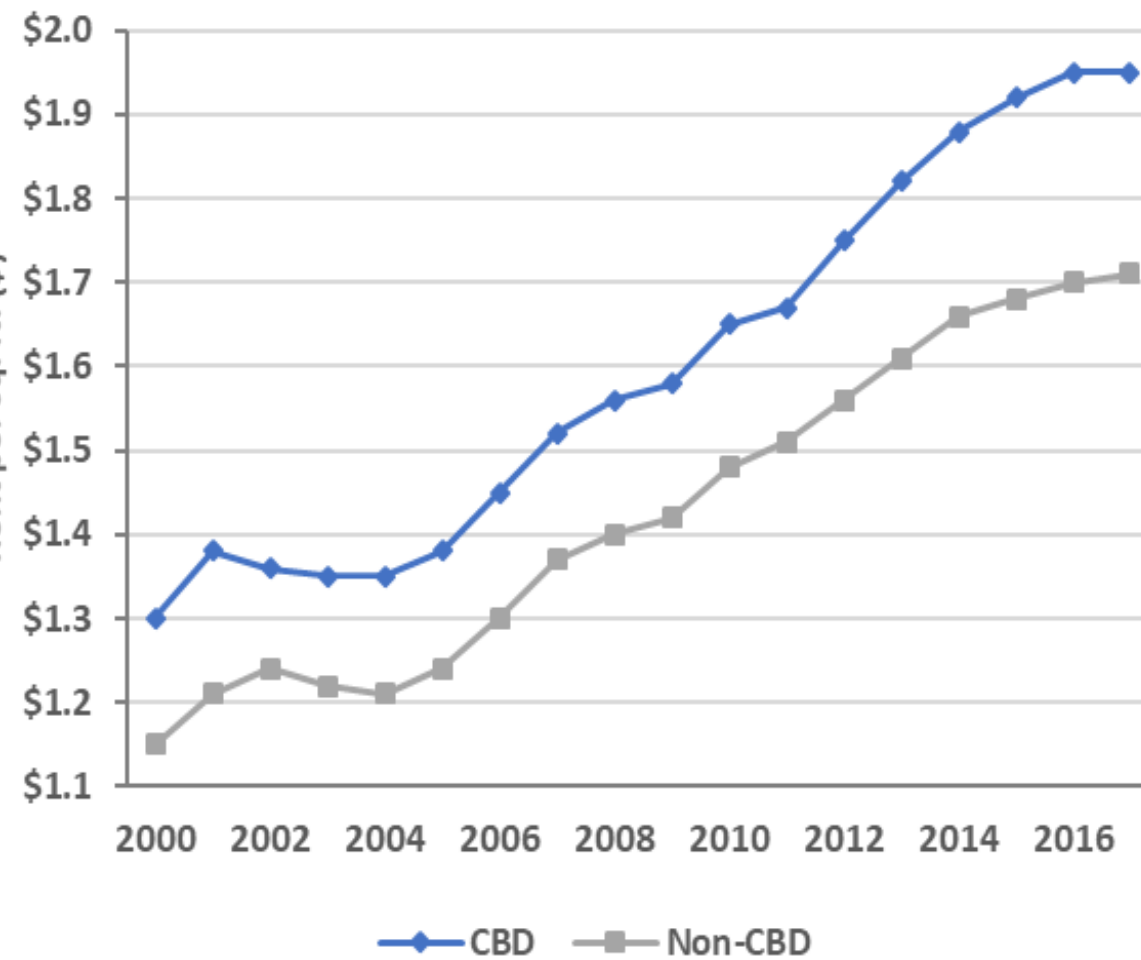


Increases in housing prices have outpaced income growth.

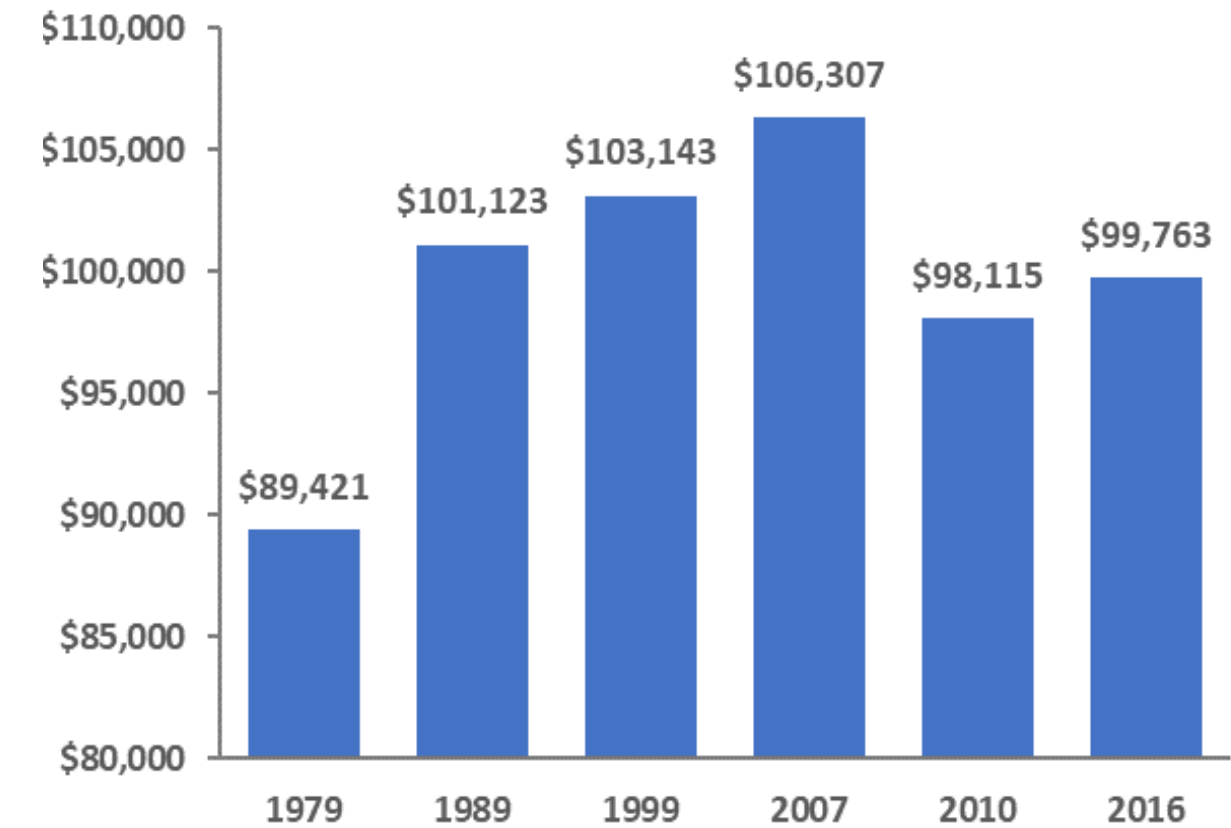
Average Sale Price



Average Rent PSF



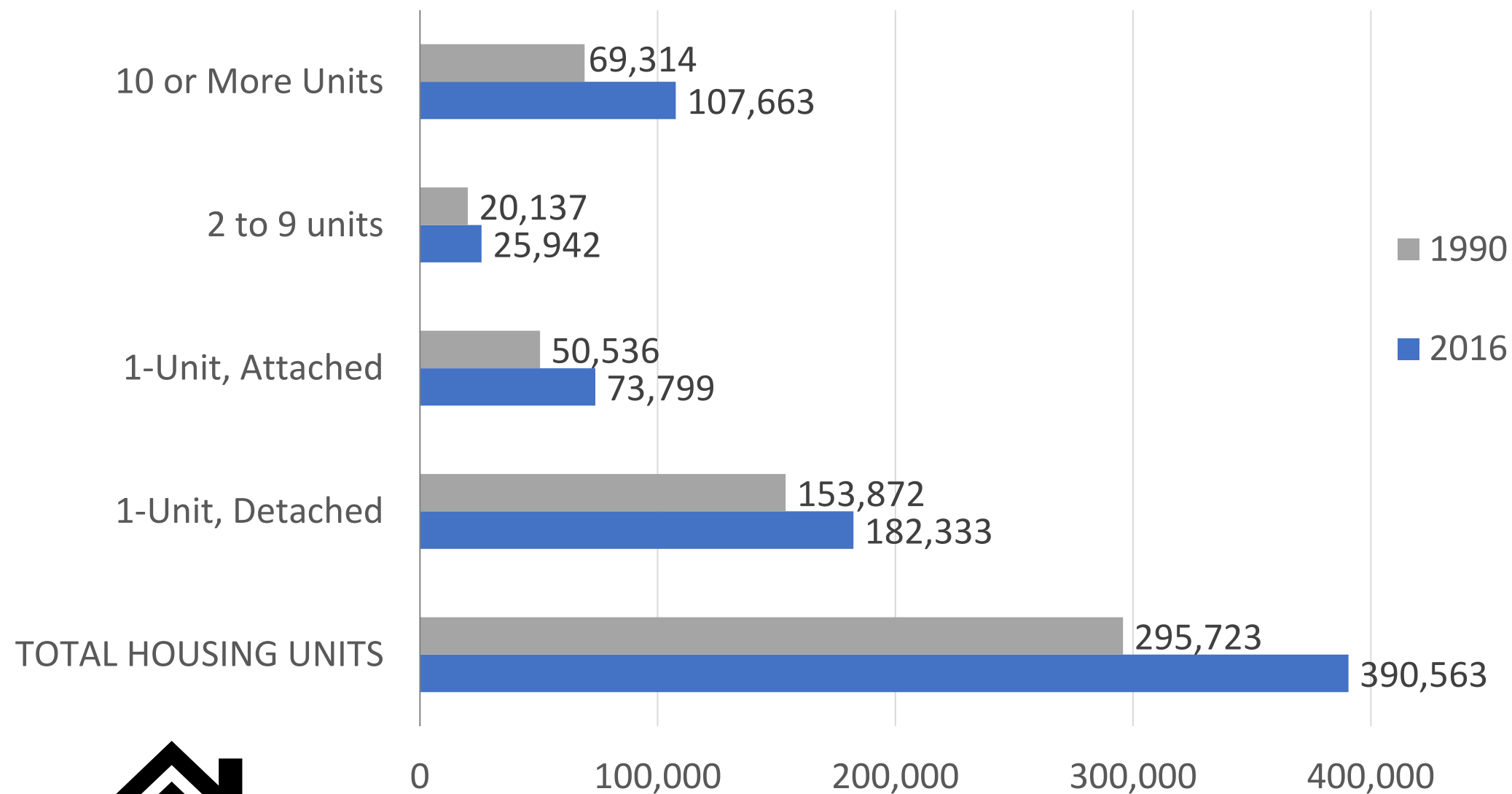
Median Income



All dollar values adjusted for inflation

Growth of multifamily housing outpaced all other types

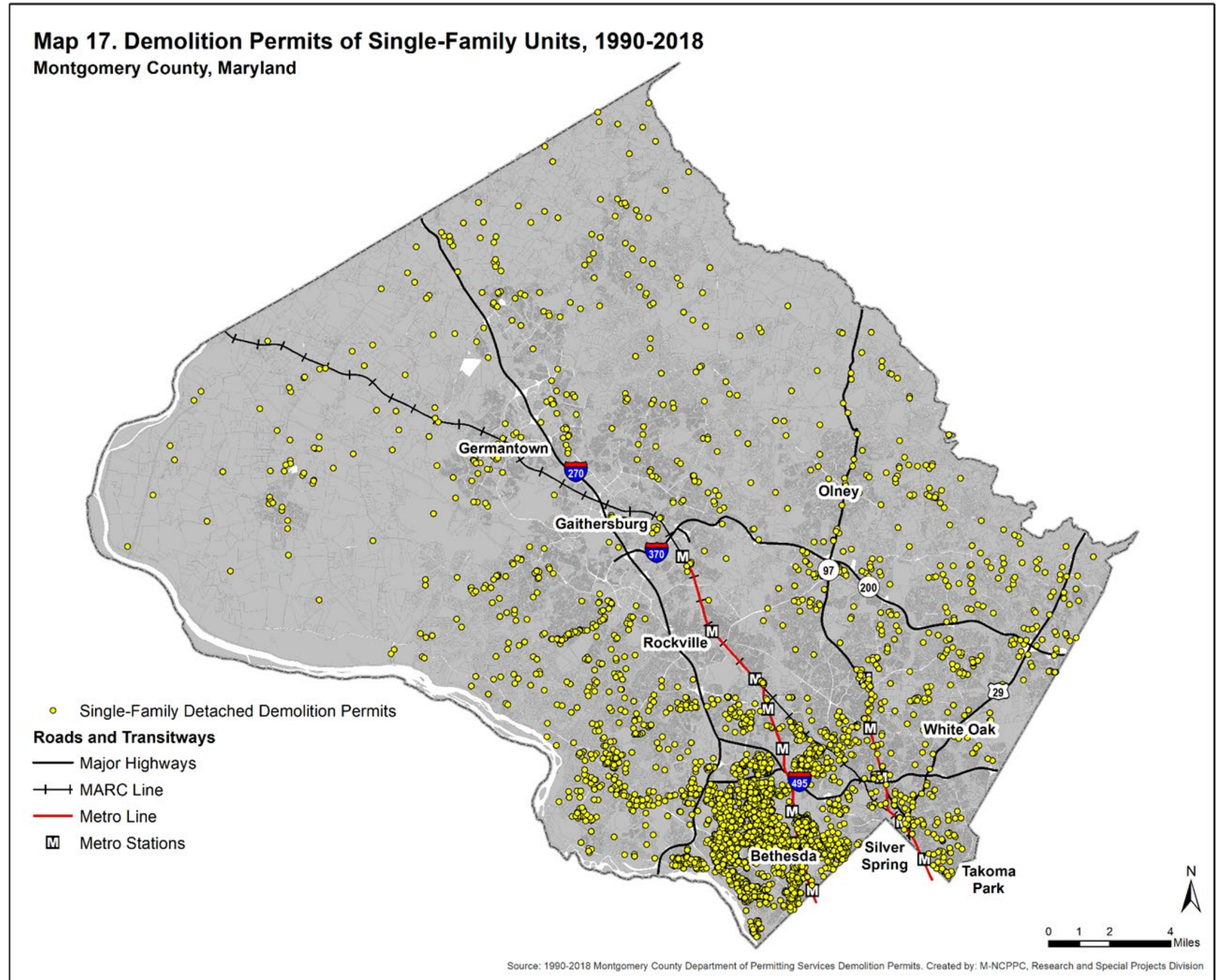
Number of housing units by type



- **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

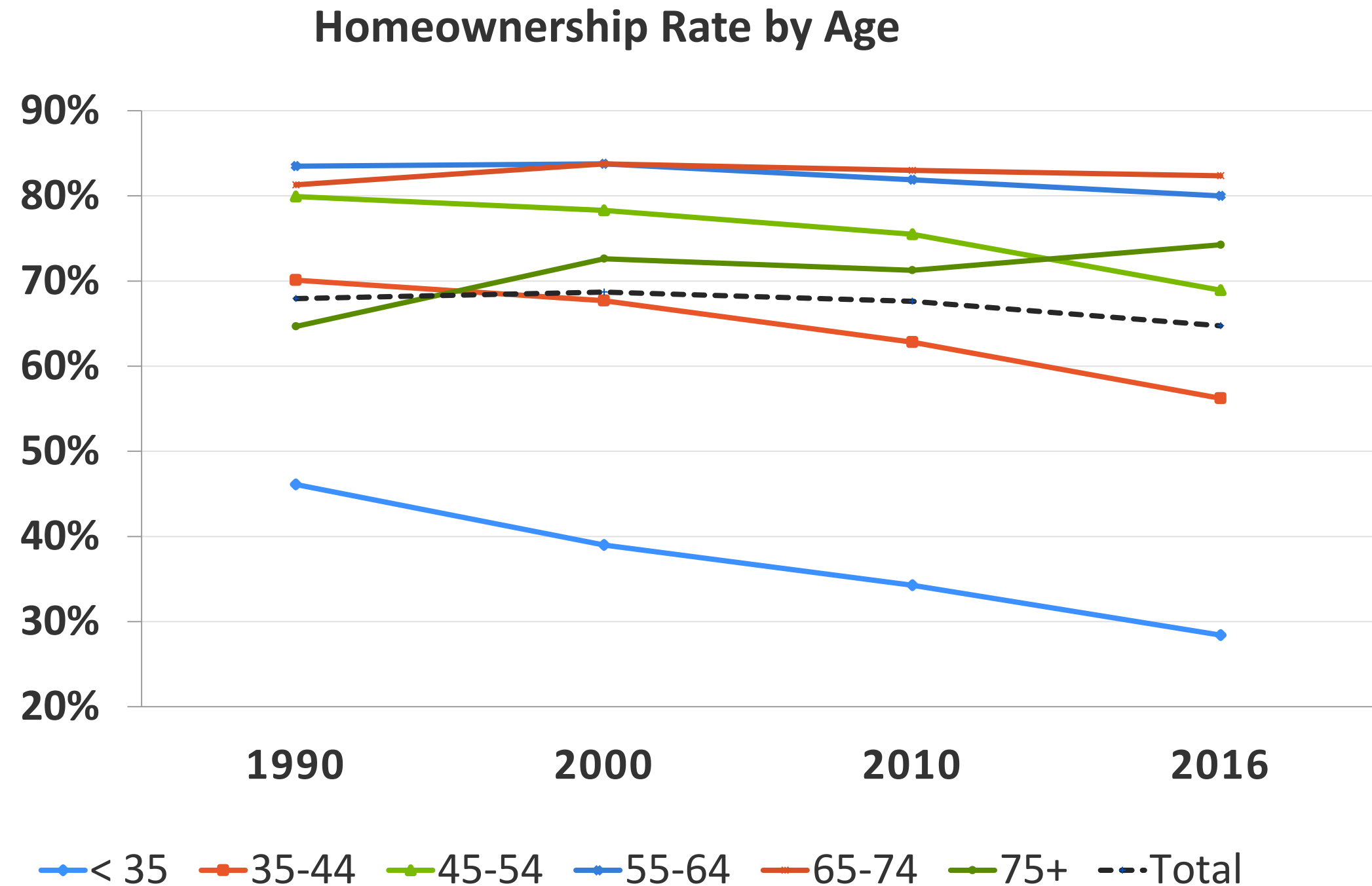
Housing unit teardowns concentrated down-county and primarily single-family

- **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



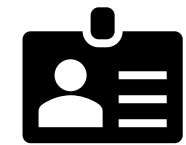
Increase in the number of older homeowners and decrease in the number of younger homeowners

- Increase in 75+ 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.

A large workforce lives here



Nearly **600,000** in 2016 – **2nd largest regionally**



Workforce **grew 31%** since 1990

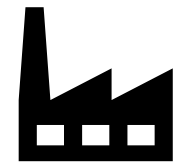


Most (**60%**) work in the county



Aging residents remain in the workforce

Sizes of job sectors remained stable



Private sector: 68-73%



Federal government: 13-15%



State/local government: 8%



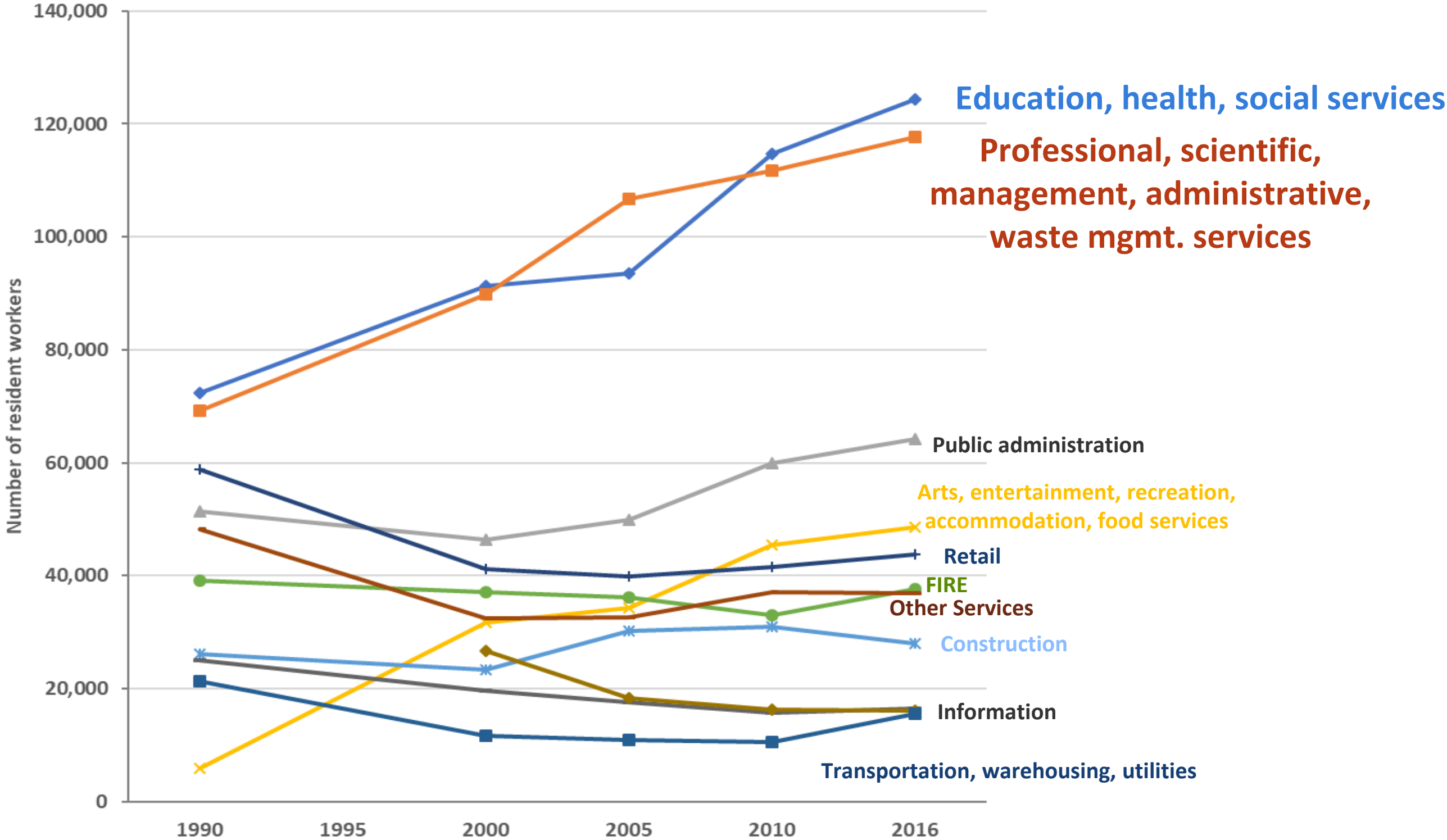
Self-employed: 6-7%

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

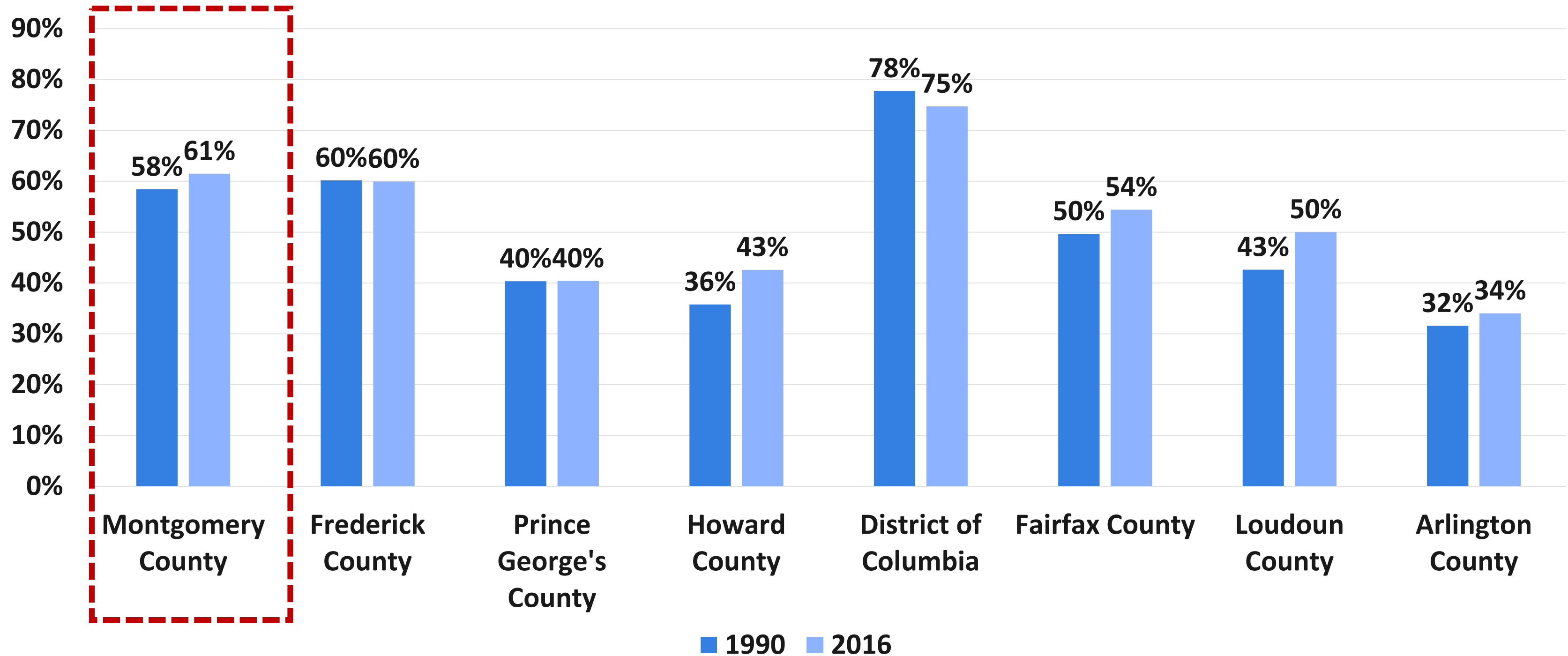
Resident employment, by industry

600,000 residents in the workforce

2nd largest workforce in the region

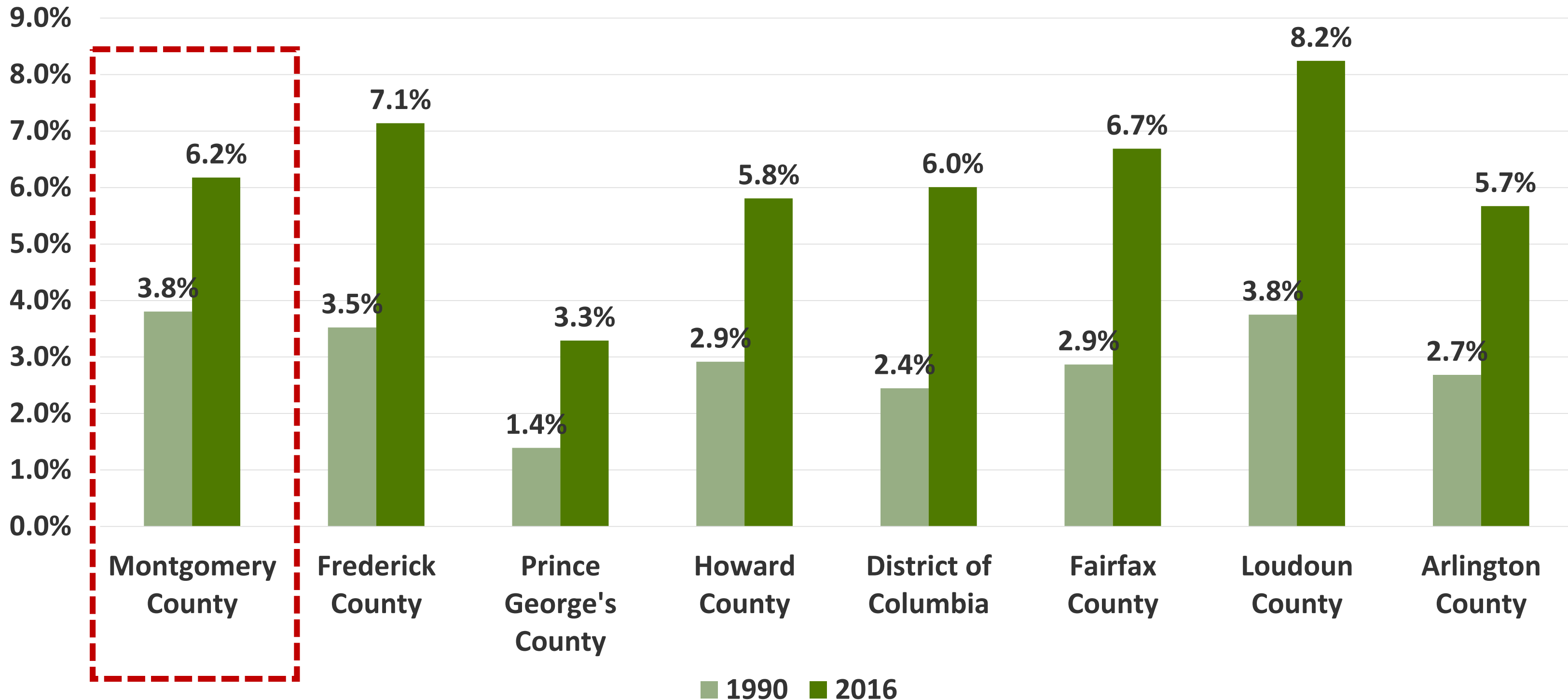


Most residents live and work in Montgomery County.



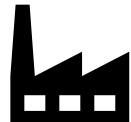
More people are working at home.

Percentage of resident workers who work at home

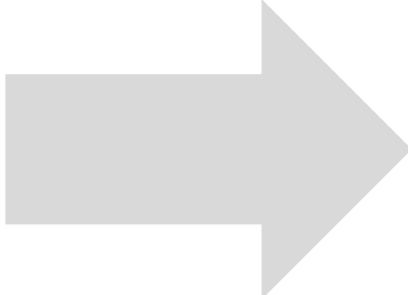


The number of QCEW jobs in the county increased by 21% since 1990 to 460,000 in 2016.

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

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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