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

April 23, 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
Montgomery County is growing, but more slowly than in past decades.

Million-plus population since 2012

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

38% population increase since 1990

Largest county in Maryland
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%)
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
Montgomery County Trends Since 1990

Types of households stabilize after 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.

All dollar values adjusted for inflation.
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
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

![Homeownership Rate by Age](chart)

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

2016

<table>
<thead>
<tr>
<th>Industry</th>
<th>Number of Residents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Education, health, social services</td>
<td>140,000</td>
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<tr>
<td>Professional, scientific, management,</td>
<td>120,000</td>
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<tr>
<td>administrative, waste mgmt. services</td>
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<tr>
<td>Public administration</td>
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<td>Arts, entertainment, recreation, accommodation, food services</td>
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<tr>
<td>Retail</td>
<td>40,000</td>
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<tr>
<td>FIRE</td>
<td>20,000</td>
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<tr>
<td>Other Services</td>
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<tr>
<td>Information</td>
<td>15,000</td>
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<tr>
<td>Transportation, warehousing, utilities</td>
<td>10,000</td>
</tr>
<tr>
<td>Construction</td>
<td>5,000</td>
</tr>
</tbody>
</table>


Number of resident workers
Most residents live and work in Montgomery County.
More people are working at home.

**Percentage of resident workers who work at home**

- Montgomery County: 3.8% (1990), 6.2% (2016)
- Frederick County: 3.5% (1990), 7.1% (2016)
- Prince George's County: 1.4% (1990), 3.3% (2016)
- Howard County: 2.9% (1990), 5.8% (2016)
- District of Columbia: 2.4% (1990), 6.0% (2016)
- Fairfax County: 2.9% (1990), 6.7% (2016)
- Loudoun County: 3.8% (1990), 8.2% (2016)
- Arlington County: 2.7% (1990), 5.7% (2016)
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
Montgomery County Trends Since 1990

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!

Carrie McCarthy
Caroline.mccarthy@montgomeryplanning.org

Erin Grimshaw
erin.grimshaw@montgomeryplanning.org

Corinne Blackford
corinne.blackford@montgomeryplanning.org

www.mcfacts.org

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