



Montgomery Planning | Research and Special Projects

03/26/2020

Agenda item #7
Informational Briefing

Growth Status and Trends

2020-2024 Subdivision Staging Policy (SSP)

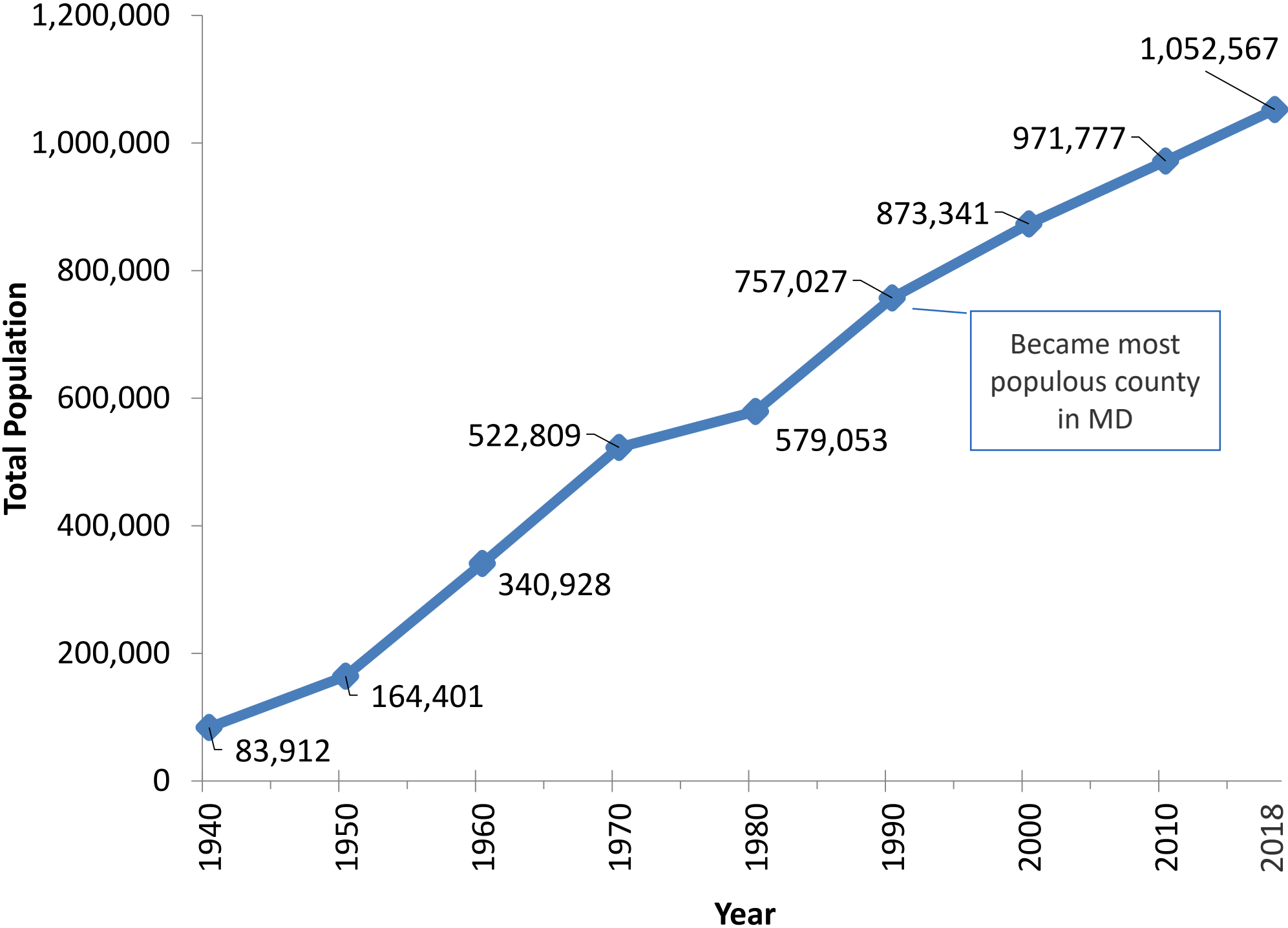


Subdivision Staging Policy (SSP)

- County Code requires that the Subdivision Staging Policy that we send to the County Council must include:
 - A status report on general land use conditions in the county
 - A forecast of the most probable trends in population, households, and employment
- These data have helped inform our discussions around the update of the SSP.

Slower growth in a maturing Montgomery County

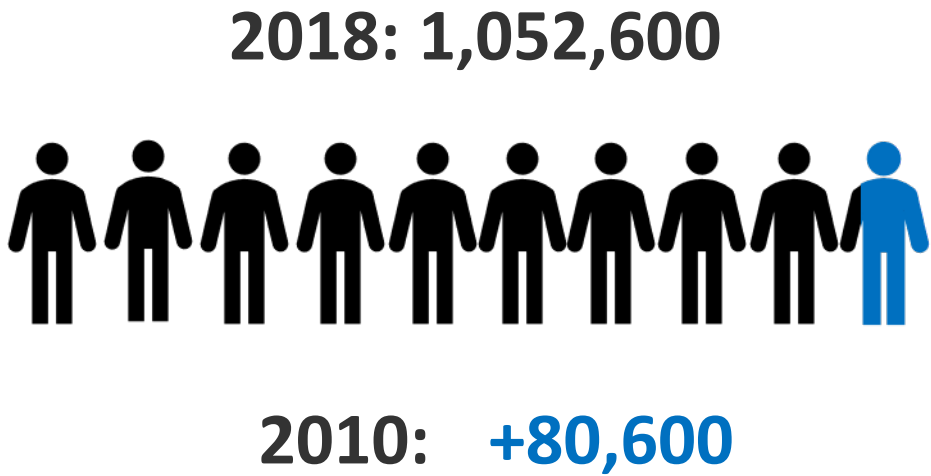
Total Population, 1940-2018



Most populous county in Maryland with over 1 million people since 2012

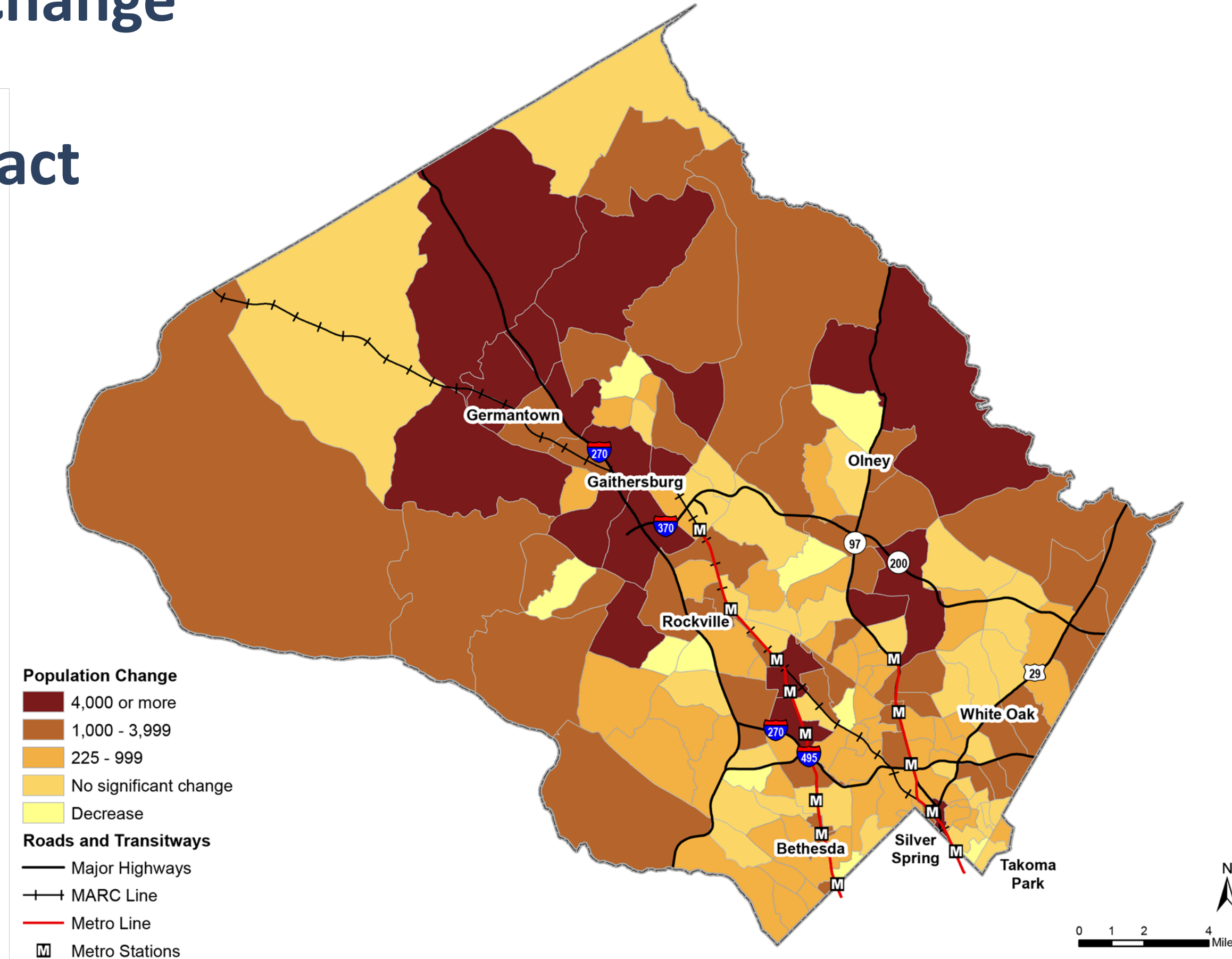


8% increase in population since 2010
38% gain between 1990 to 2018



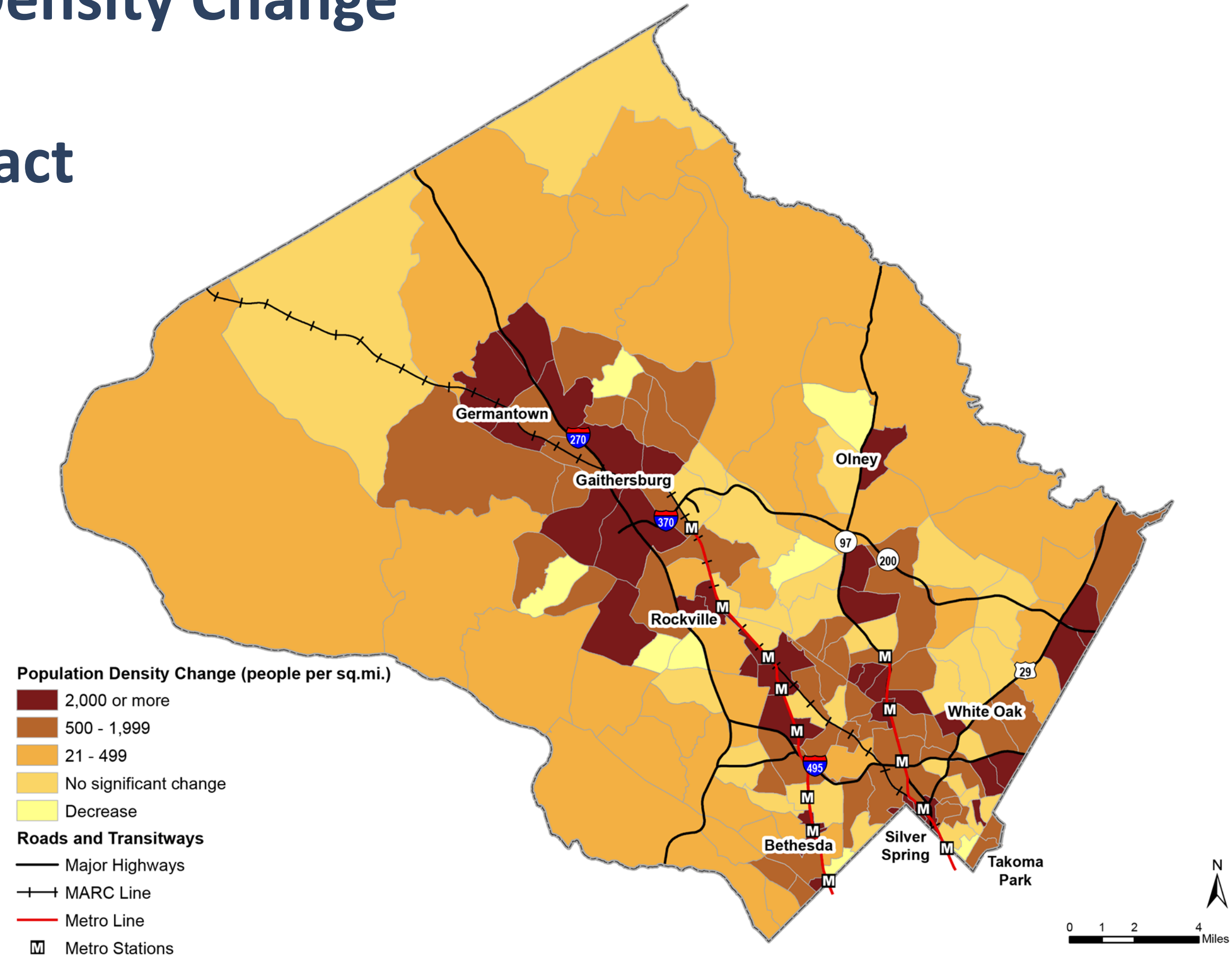
Source: 1940-2010 Decennial Census, 2018 Population Estimate Program U.S. Census Bureau.

Population Change 1990-2018 by Census Tract



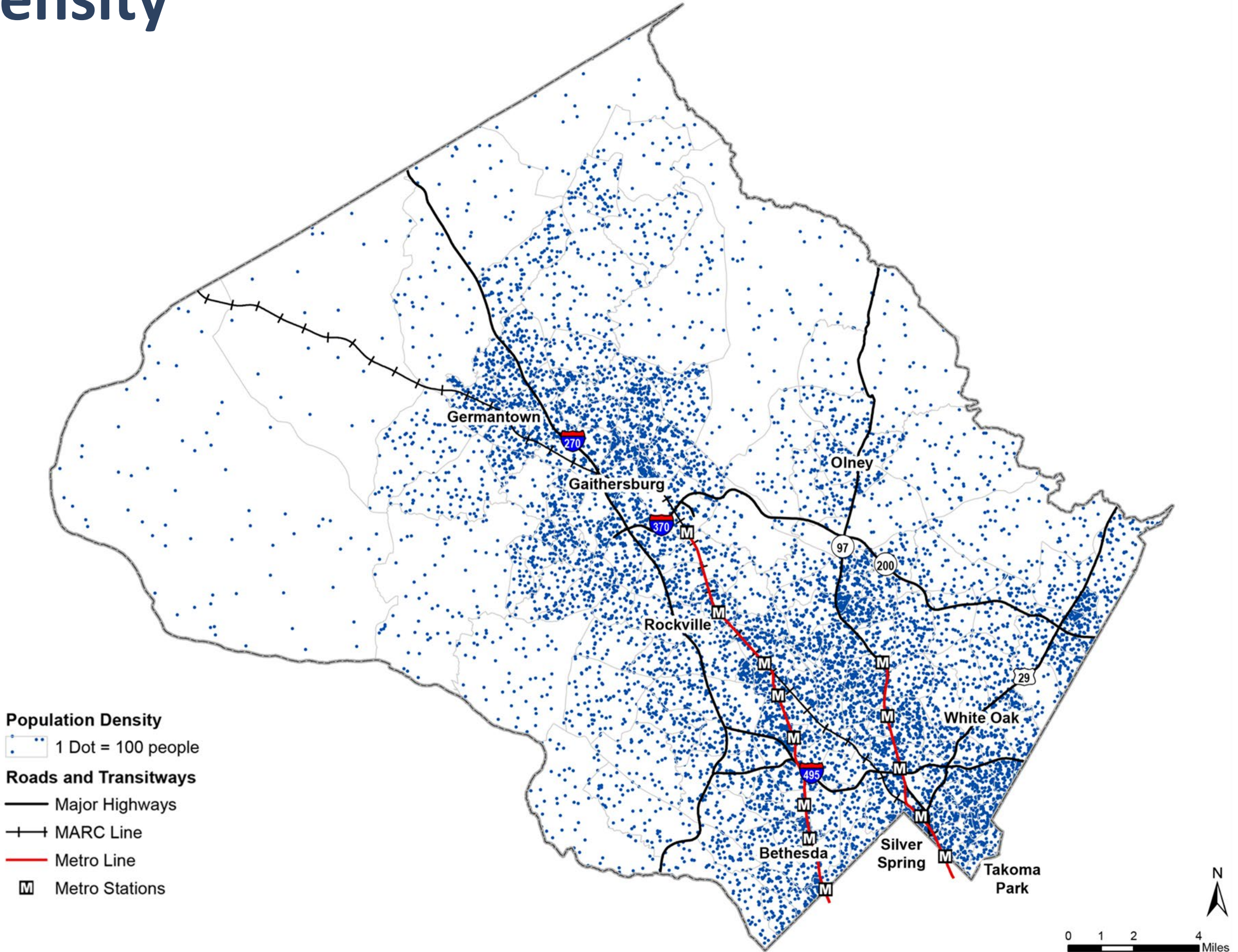
Source: 1990 Census and 2014-2018 American Community Survey 5-year estimate, U.S. Census Bureau. Created by M-NCPPC, Research & Special Projects

Population Density Change 1990-2018 by Census Tract



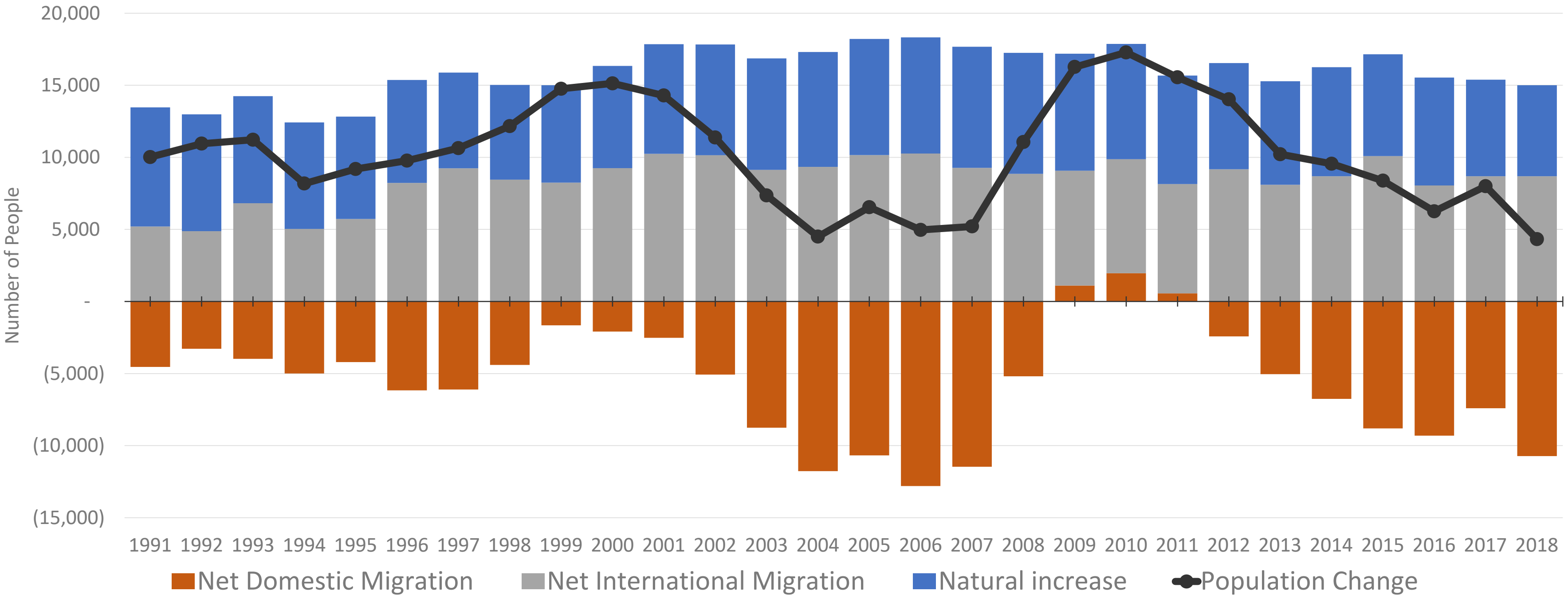
Source: 1990 Census and 2014-2018 American Community Survey 5-year estimate, U.S. Census Bureau. Created by M-NCPPC, Research & Special Projects

Population Density 2018



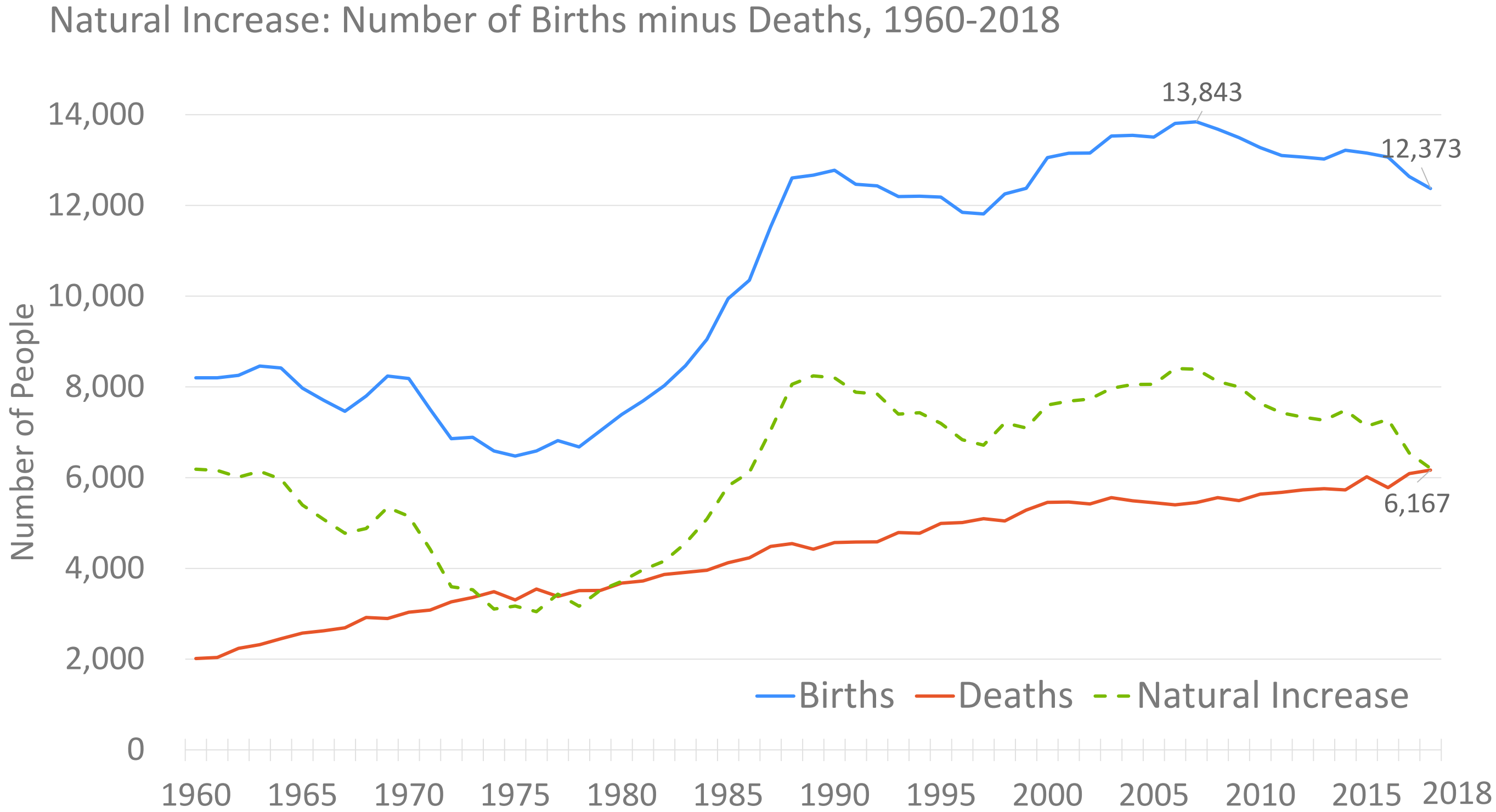
Source: 2014-2018 American Community Survey 5-year estimate, U.S. Census Bureau. Created by M-NCPPC, Research & Special Projects

Components of Population Growth 1991-2018



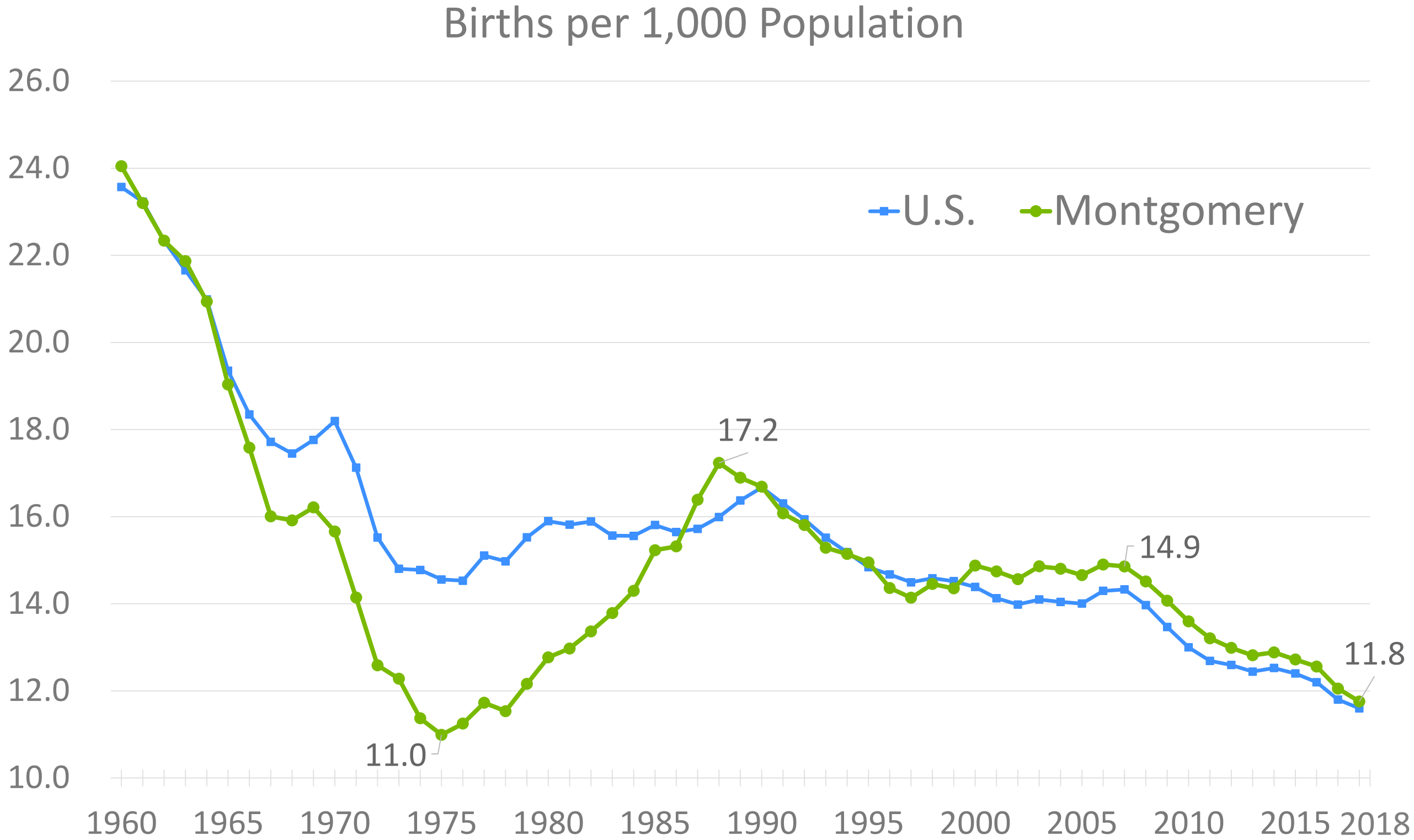
Source: U.S. Census Bureau, Population Estimate Program, 3/2019

Number of Births at Lowest Point since 1998



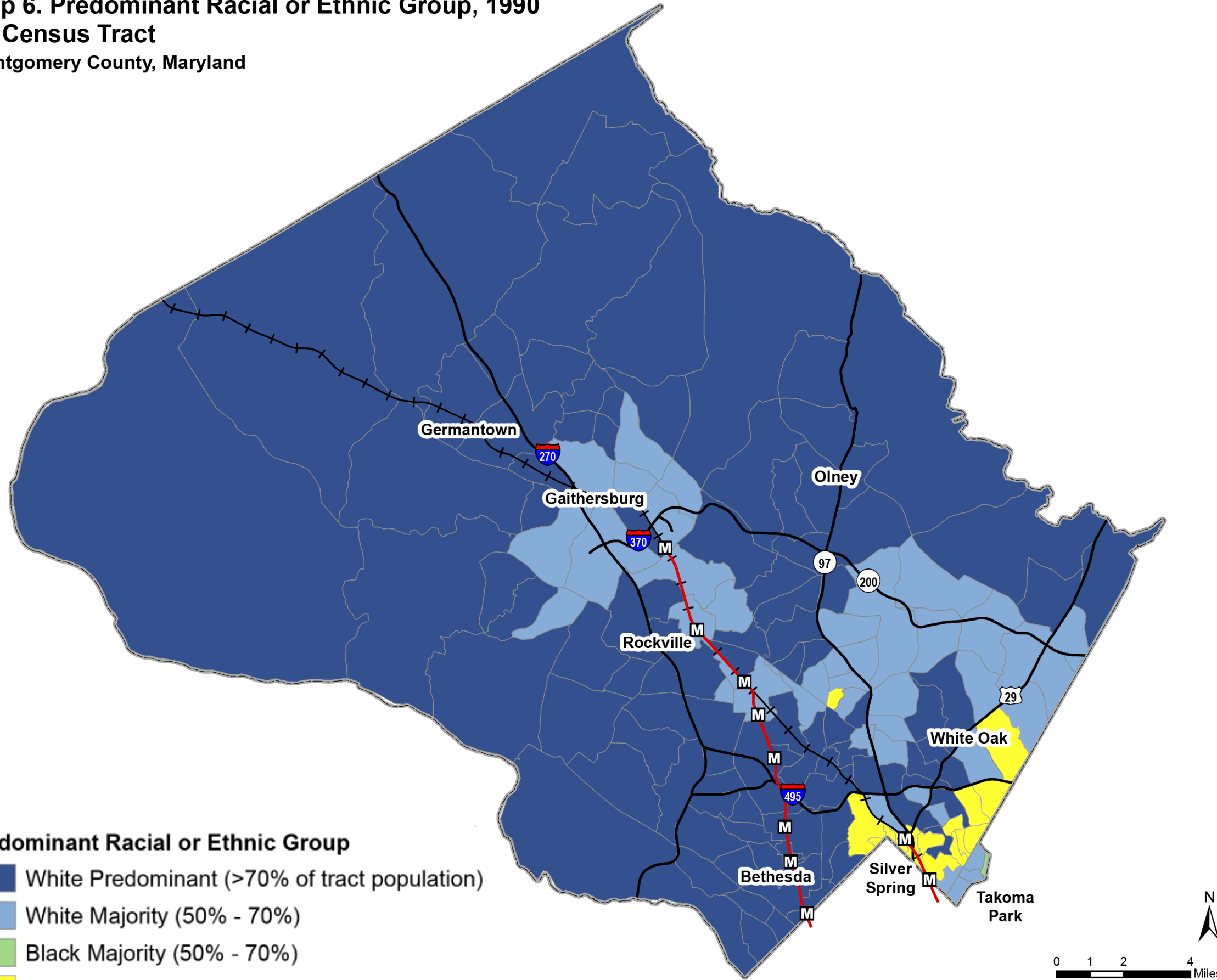
Source: Maryland Vital Statistics Annual Report, Maryland Department of Health.

Birth Rates Decline Since 2007



Source: Maryland Vital Statistics Annual Report, Maryland Department of Health.

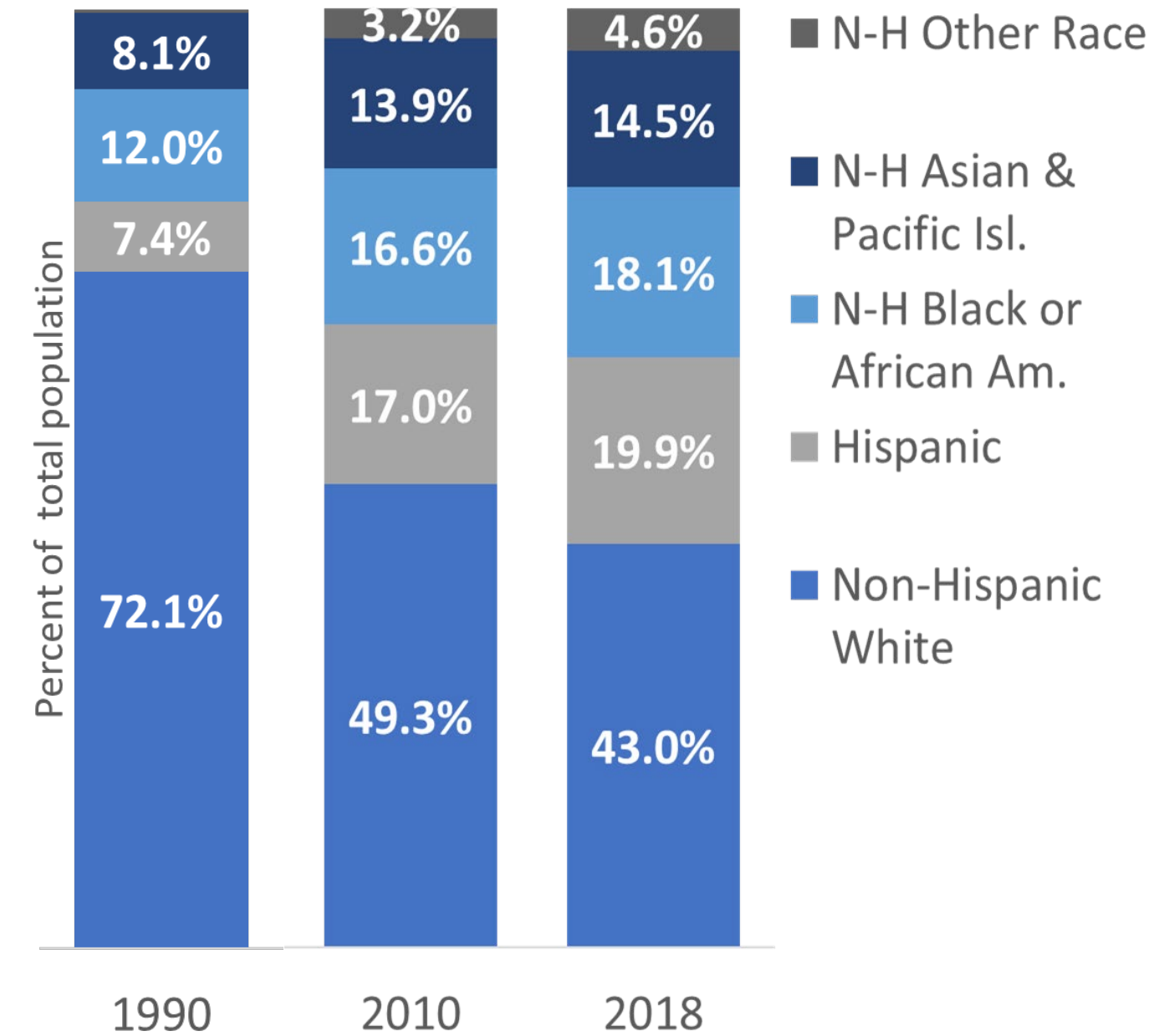
**Map 6. Predominant Racial or Ethnic Group, 1990
by Census Tract**
Montgomery County, Maryland



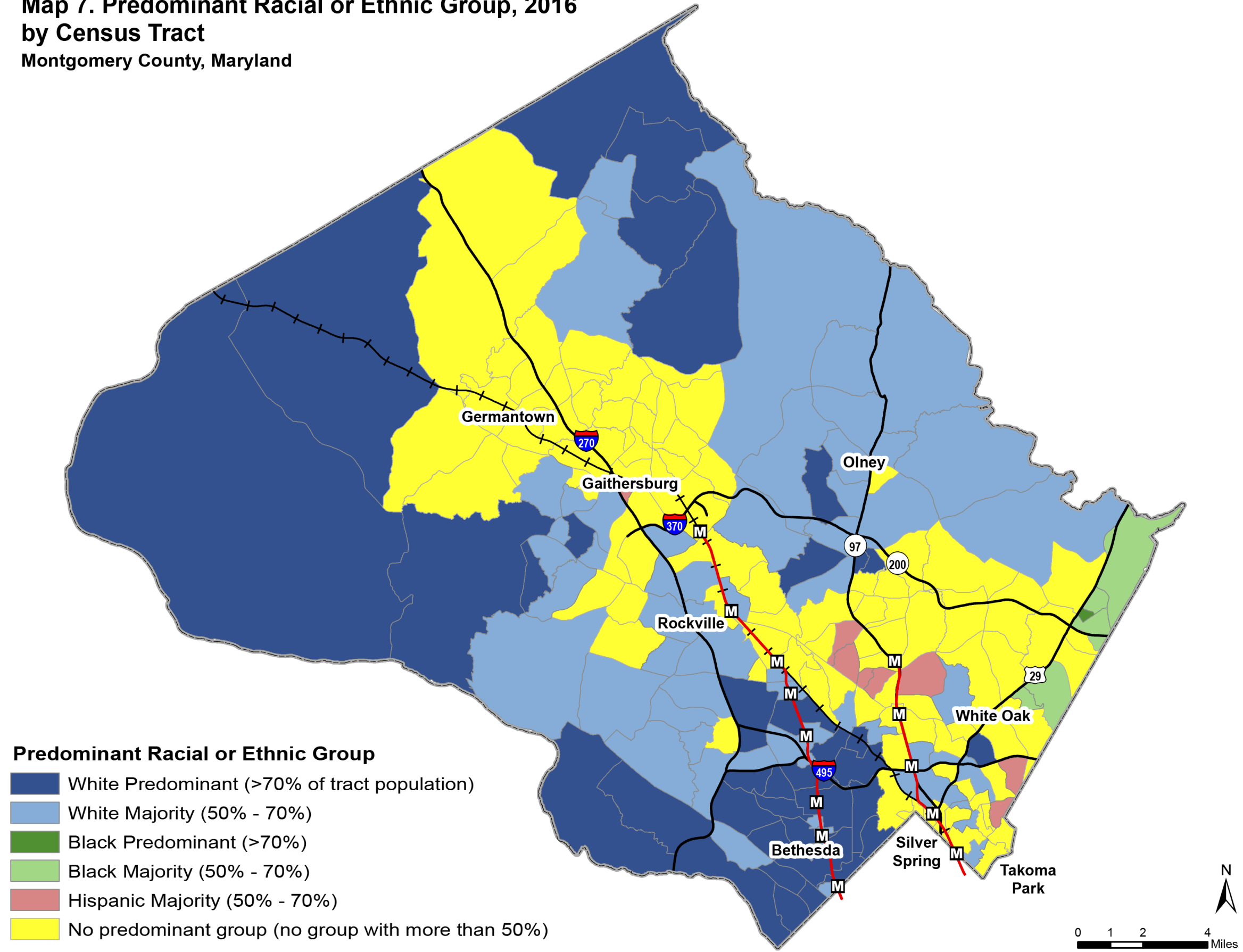
Source: 1990 Census, U.S. Census Bureau. Created by: M-NCPPC, Research and Special Projects Division

Increasing racial & ethnic diversity

People of Color in 2018: 599,674 (57%)



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

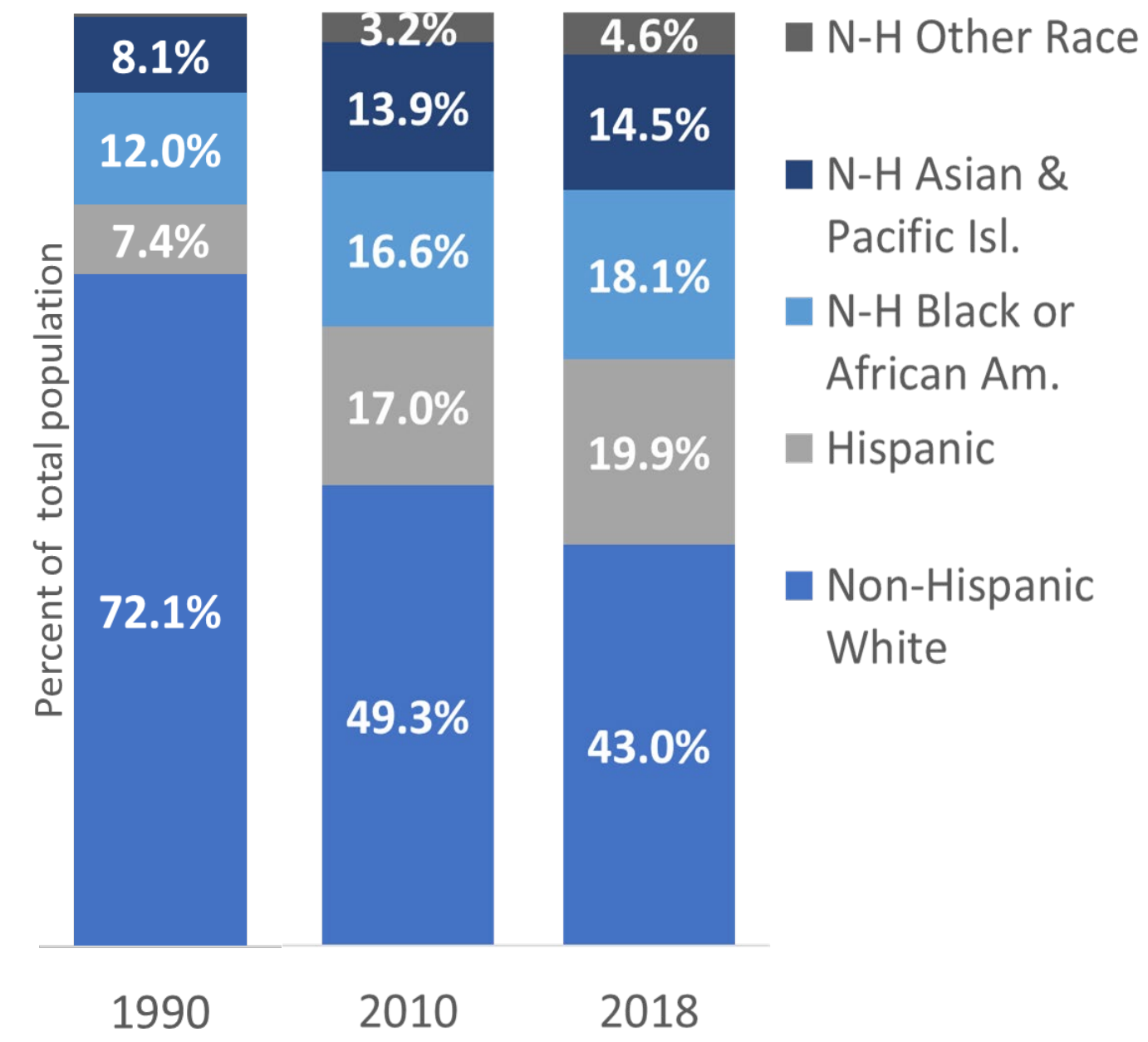


- Predominant Racial or Ethnic Group**
- White Predominant (>70% of tract population)
 - White Majority (50% - 70%)
 - Black Predominant (>70%)
 - Black Majority (50% - 70%)
 - Hispanic Majority (50% - 70%)
 - No predominant group (no group with more than 50%)

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

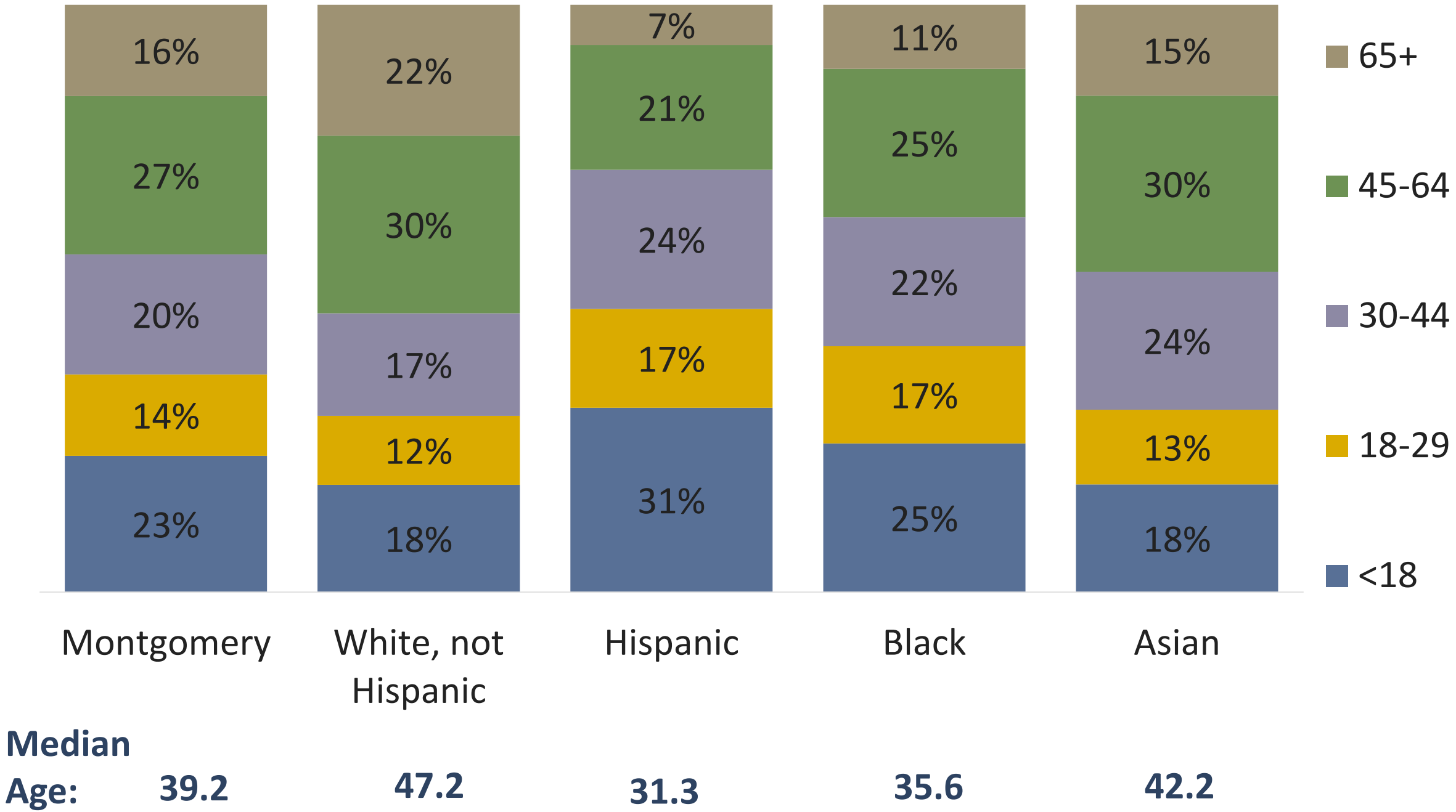
Increasing racial & ethnic diversity

People of Color in 2018: 599,674 (57%)



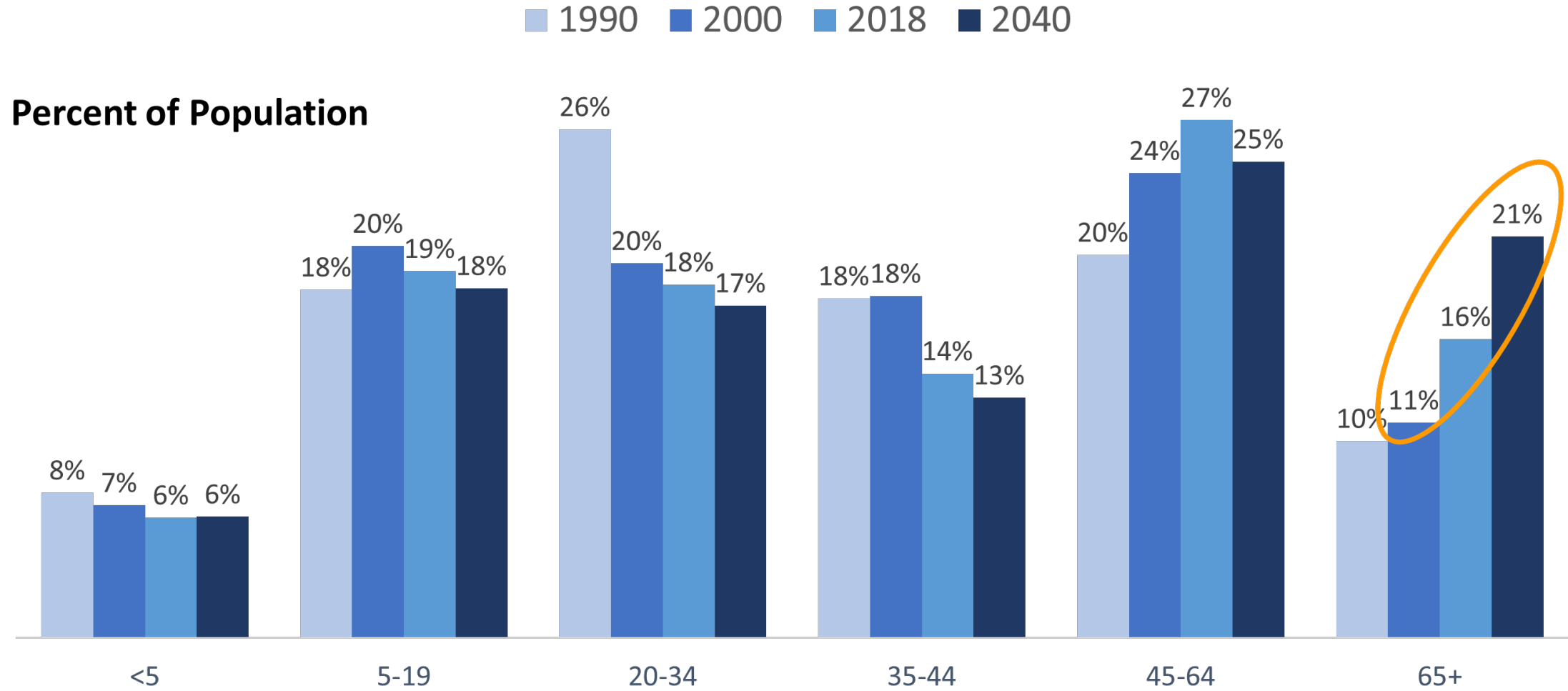
Youthful Minorities and Aging White Baby Boomers

Race & Hispanic Origin by Age (2018)



Source: U.S. Census Bureau, 2018 American Community Survey, 1-year estimate

Increasingly Older Population



Aging baby boom generation:

- 1990: ages 26 to 44
- 2018: ages 54 to 72
- Increased median age from 33.9 years in 1990 to 39.2 in 2018
- Forecasted to increase 65+ population from 16% in 2018 to 21% in 2040

In 2018:

- Young adults 20 to 34: 18% (193,550)
- Children <18: 23% (244,087)
- Older adults 65+: 16% (163,645)

Source: U.S. Census Bureau, 1990 U. S. Census, 2018 American Community Survey, 1-year estimate; Maryland Department of Planning Age Forecast

Percentage of Owner-Occupied Households, 1990-2018

by Age of Homeowners

Increase in 55+ homeowners

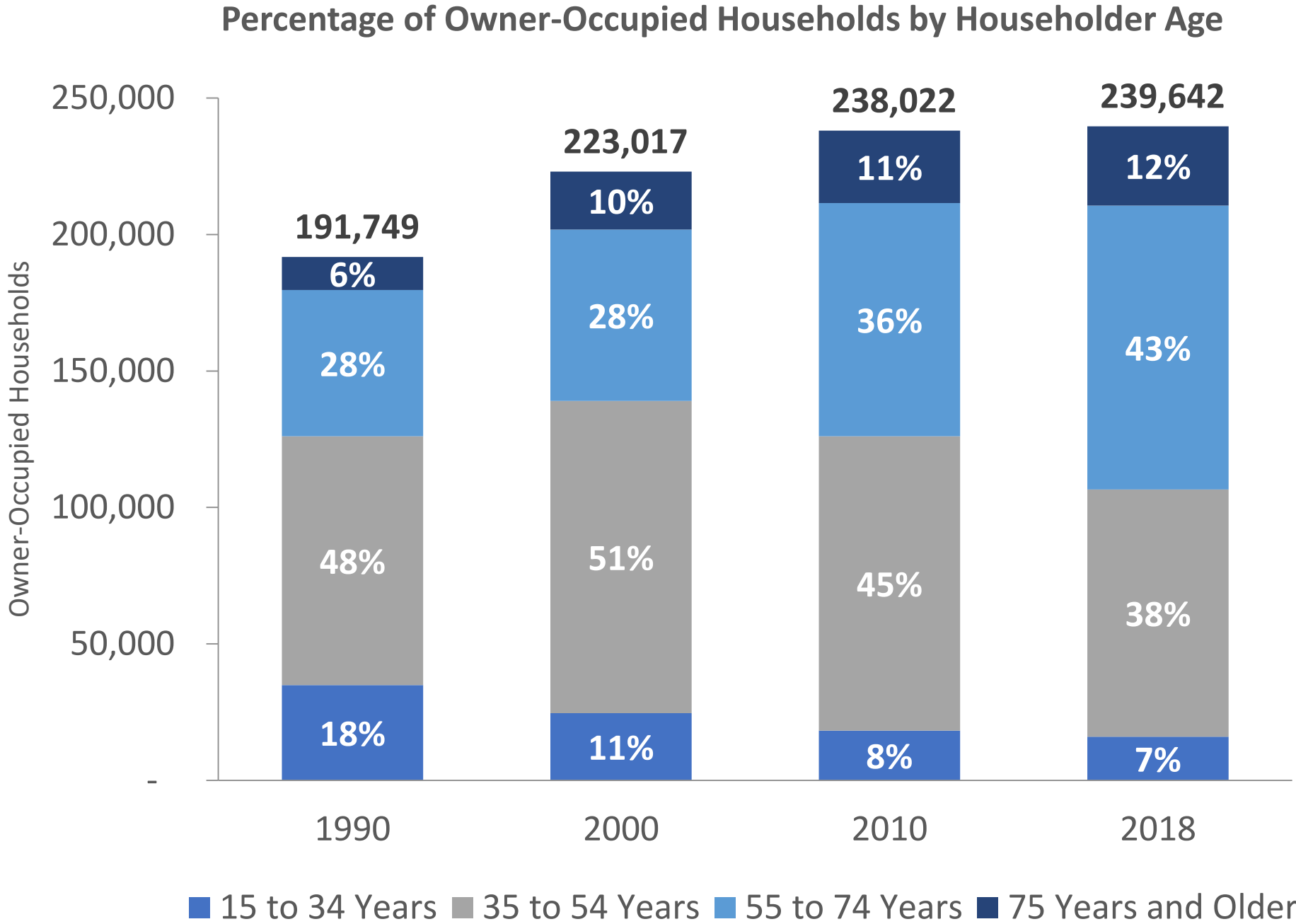
- 34% in 1990
- 56% in 2018

Decrease in younger homeowners

- 18% in 1990
- 7% in 2018

Demand Shifts

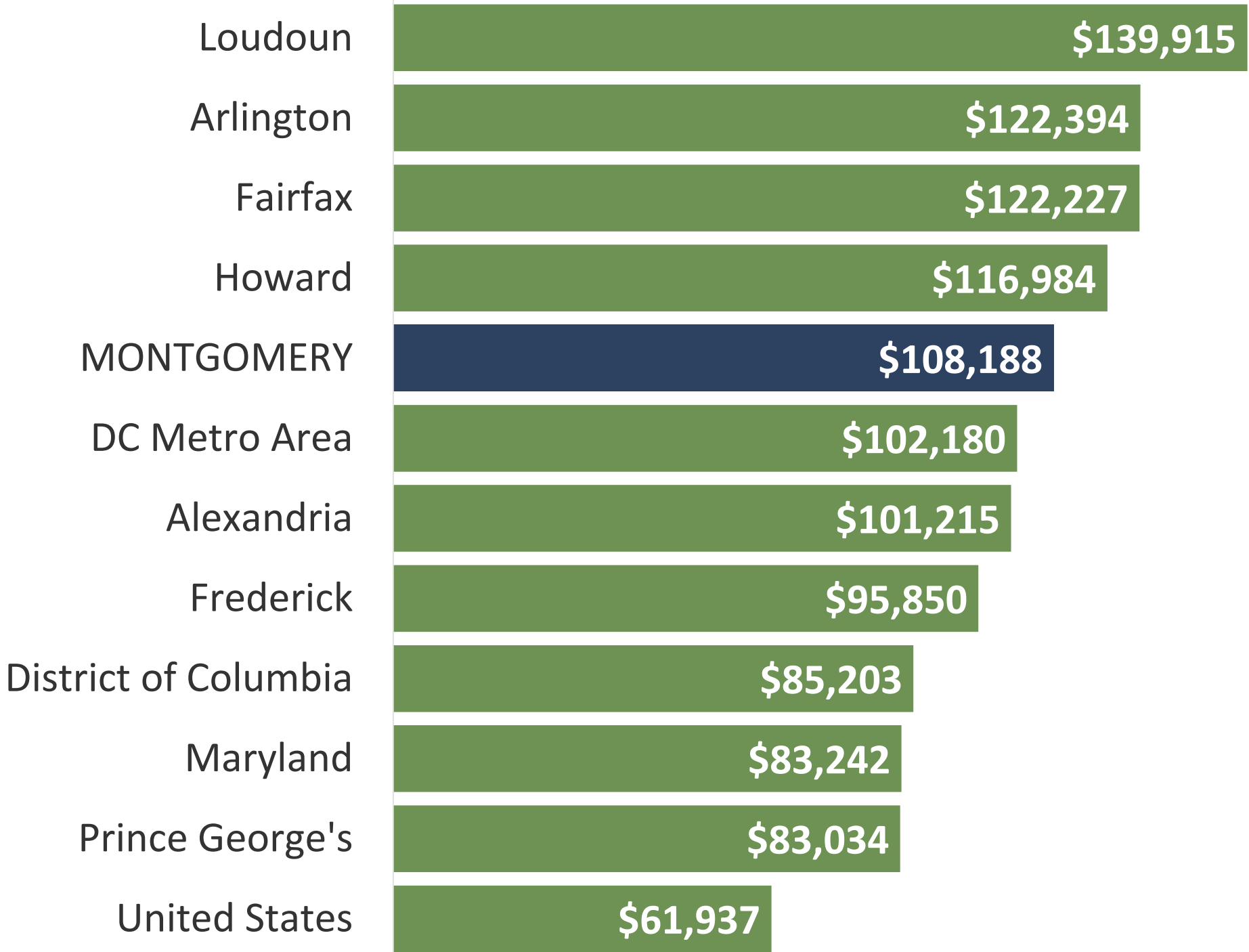
- Population Changes
- Millennial tastes & preferences
- Affordability
- Product Diversity



Source: 1990-2010 Census, 2018 American Community Survey, 1-year estimate U.S. Census Bureau.

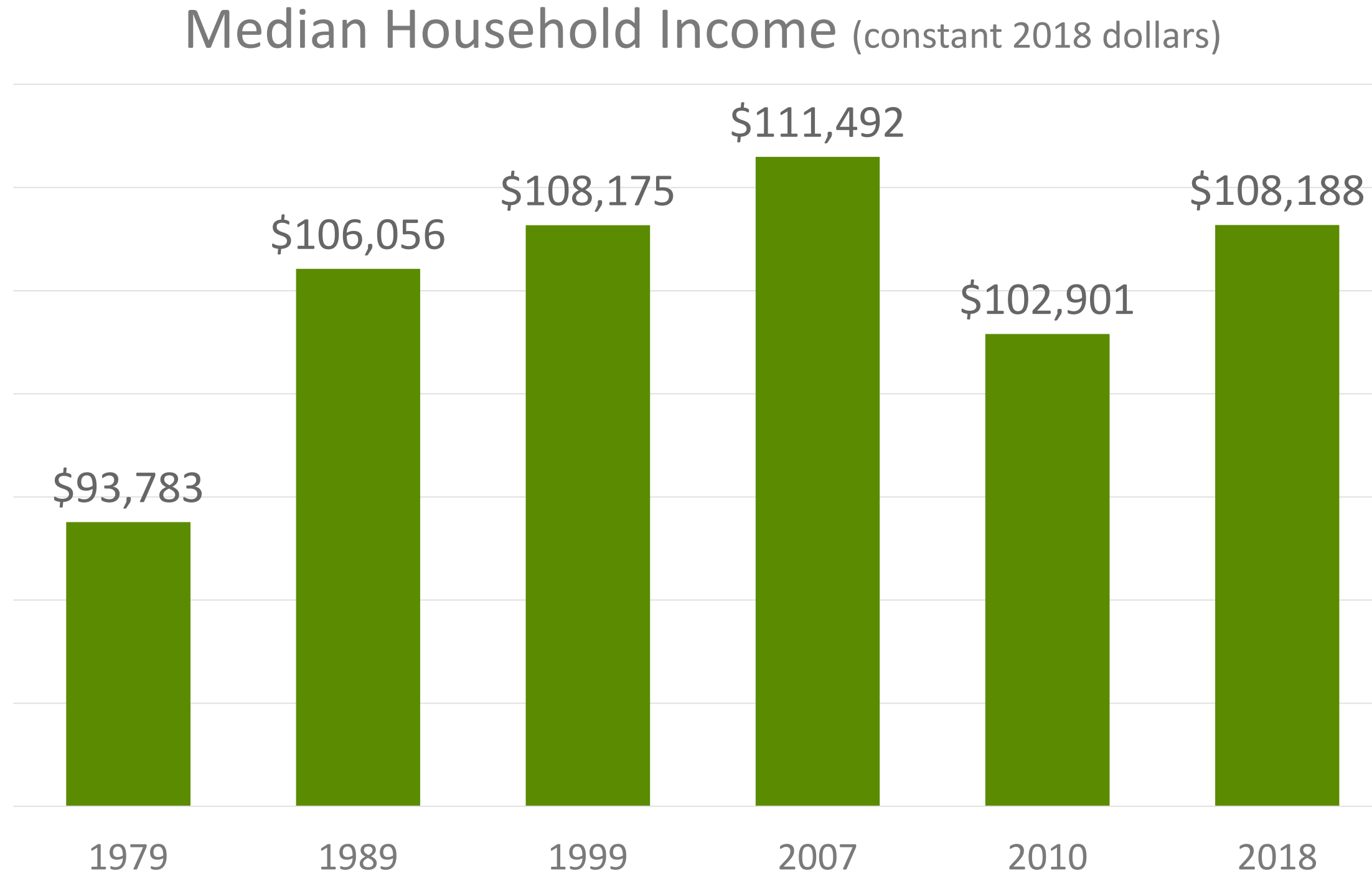
Consistently high-ranking median income in region

2018 Median Household Income



Source: 2018 American Community Survey, 1-year estimate, U.S. Census Bureau

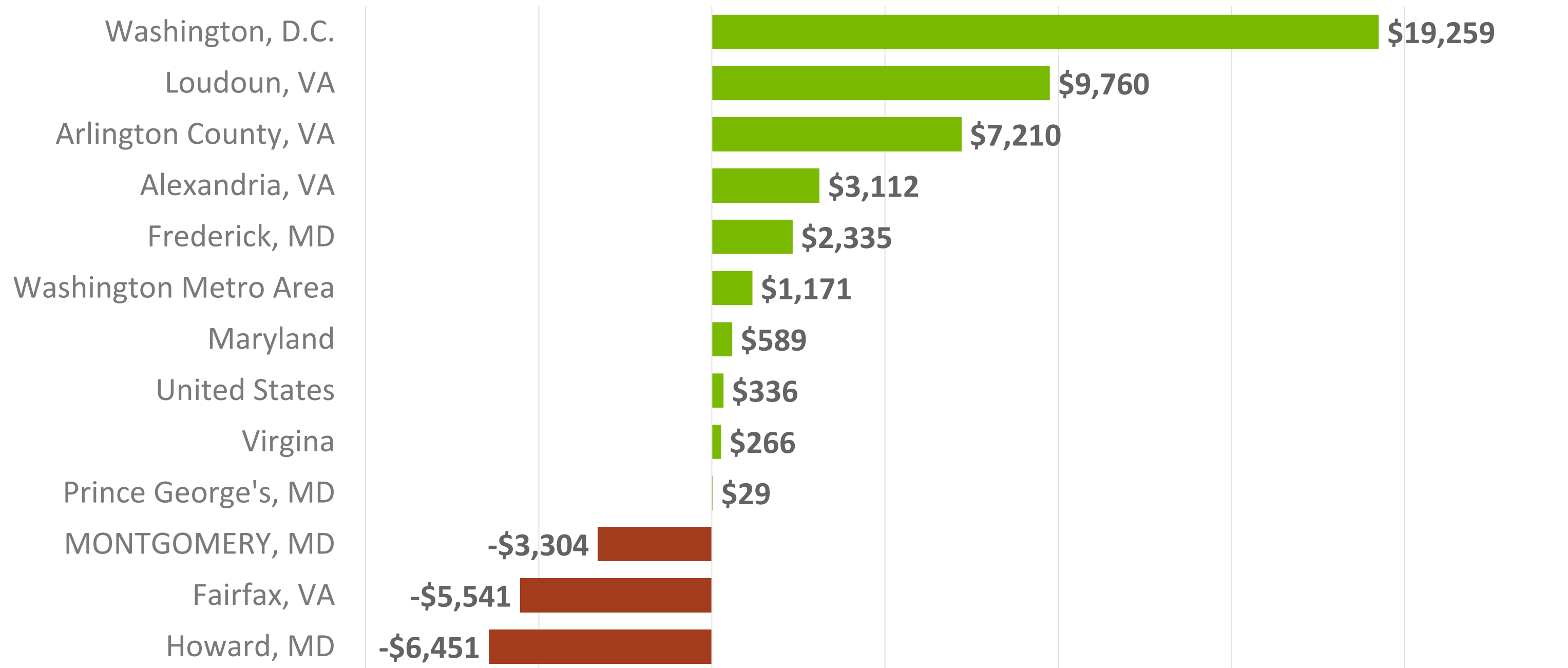
After decades of income growth, slow recovery post-recession



Source: U.S. Decennial Census, American Community Survey, 1-year estimate, U.S. Census Bureau

Median incomes in most areas rebounded from the last recession

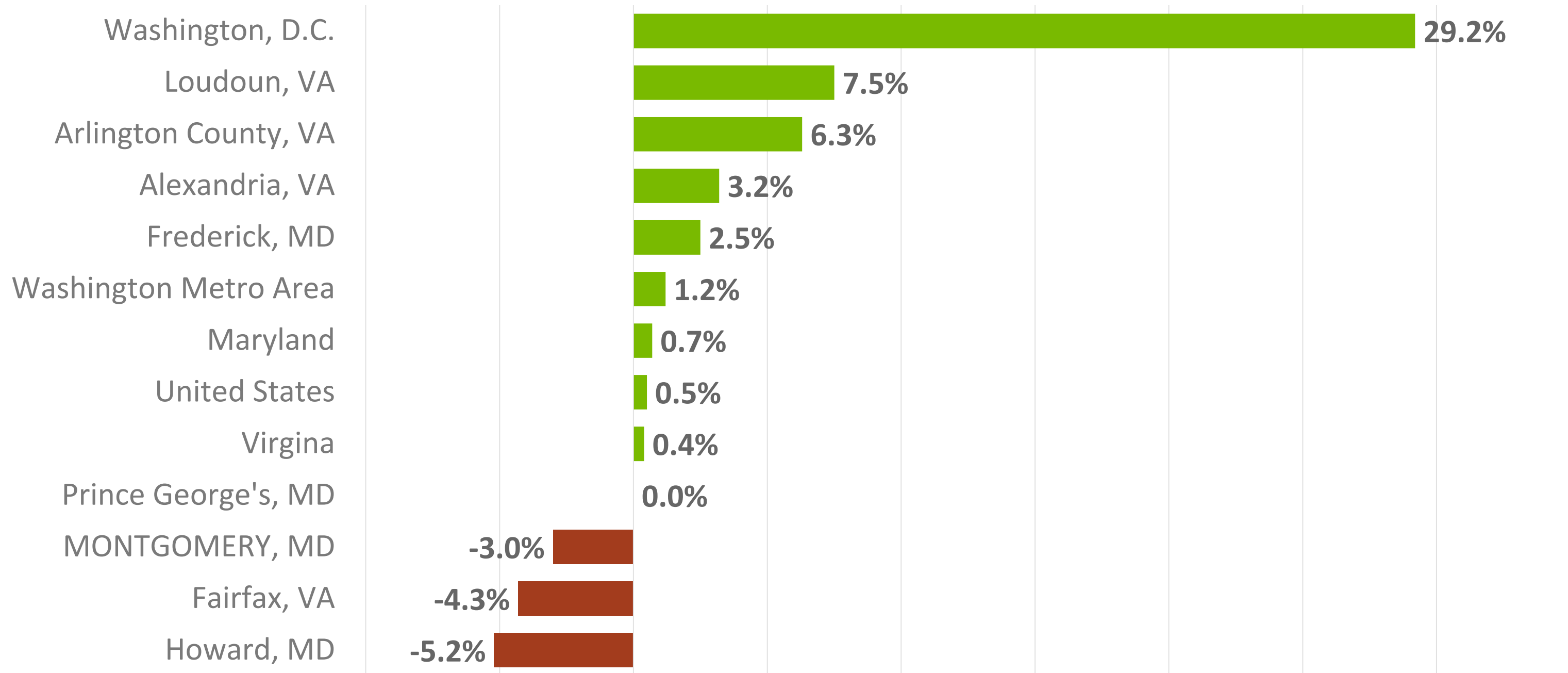
Median Household Income Change from 2007 to 2018 (constant 2018\$)



Source: U.S. Census Bureau, American Community Survey, 2007 & 2018, 1-year estimates.

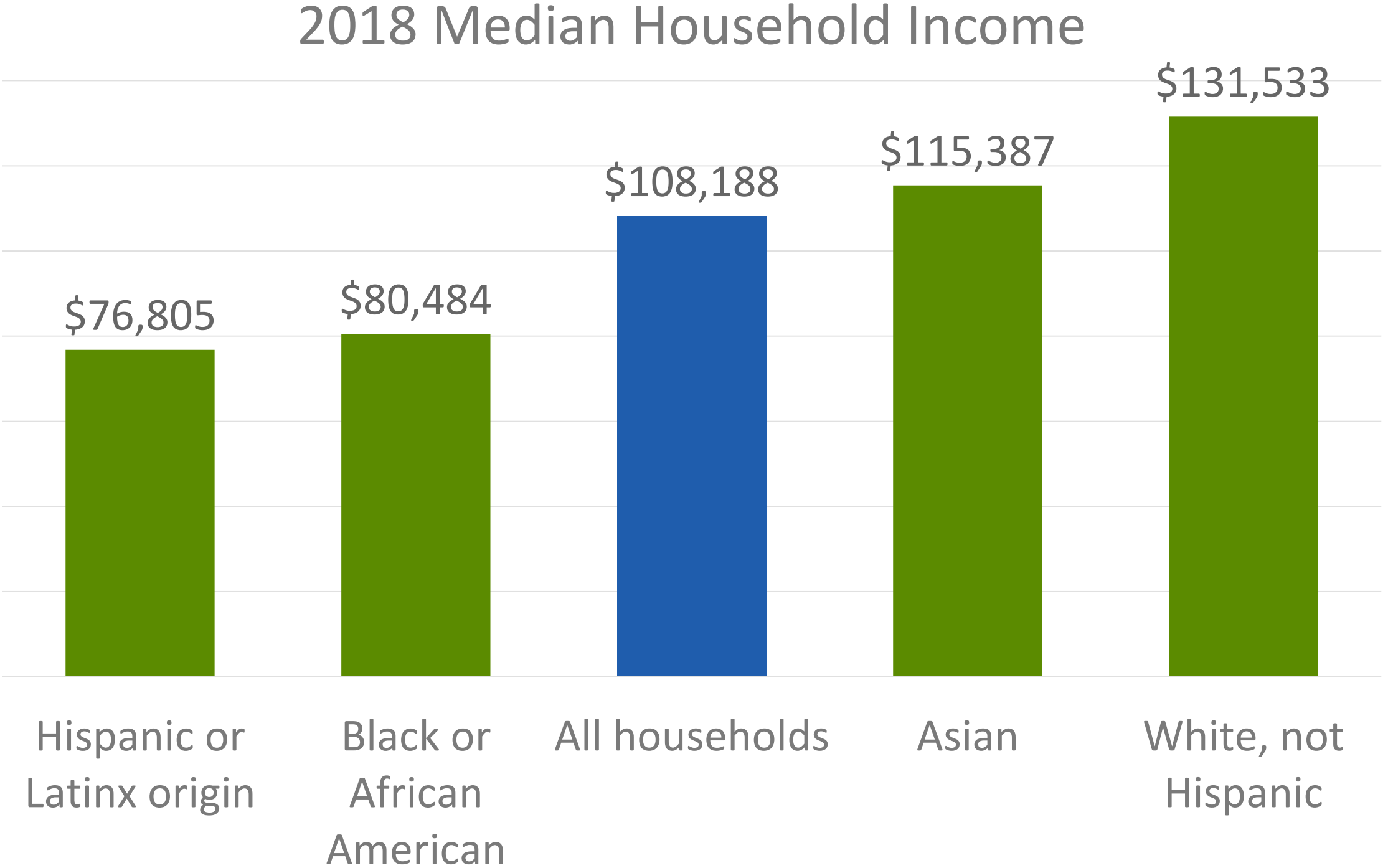
Washington, D.C. median income surges with new development

Median Household Income % Change from 2007 to 2018 (constant 2018\$)



Source: U.S. Census Bureau, American Community Survey, 2007 & 2018, 1-year estimates.

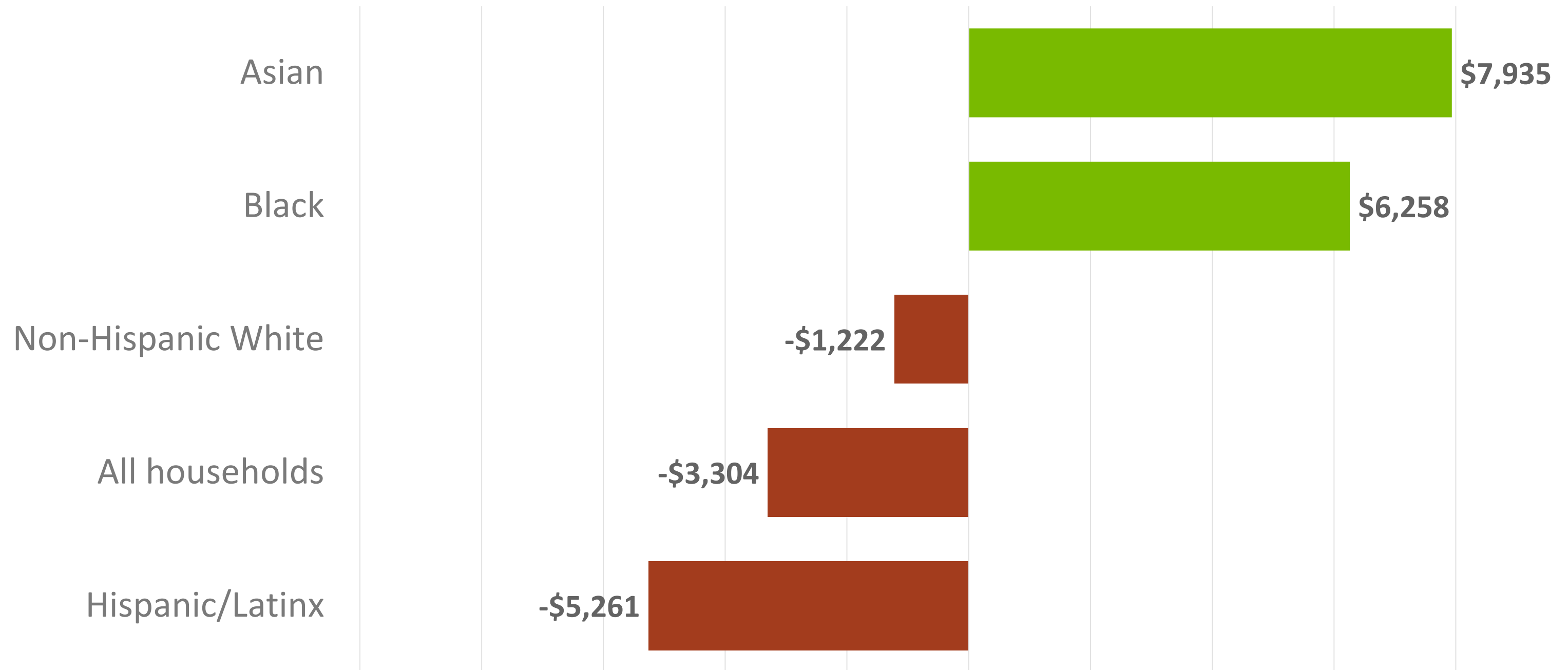
Income is unequally distributed by race and ethnicity



Source: 2018 American Community Survey, 1-year estimate, U.S. Census Bureau

Median incomes of Asian and African American households rebounded from the last recession

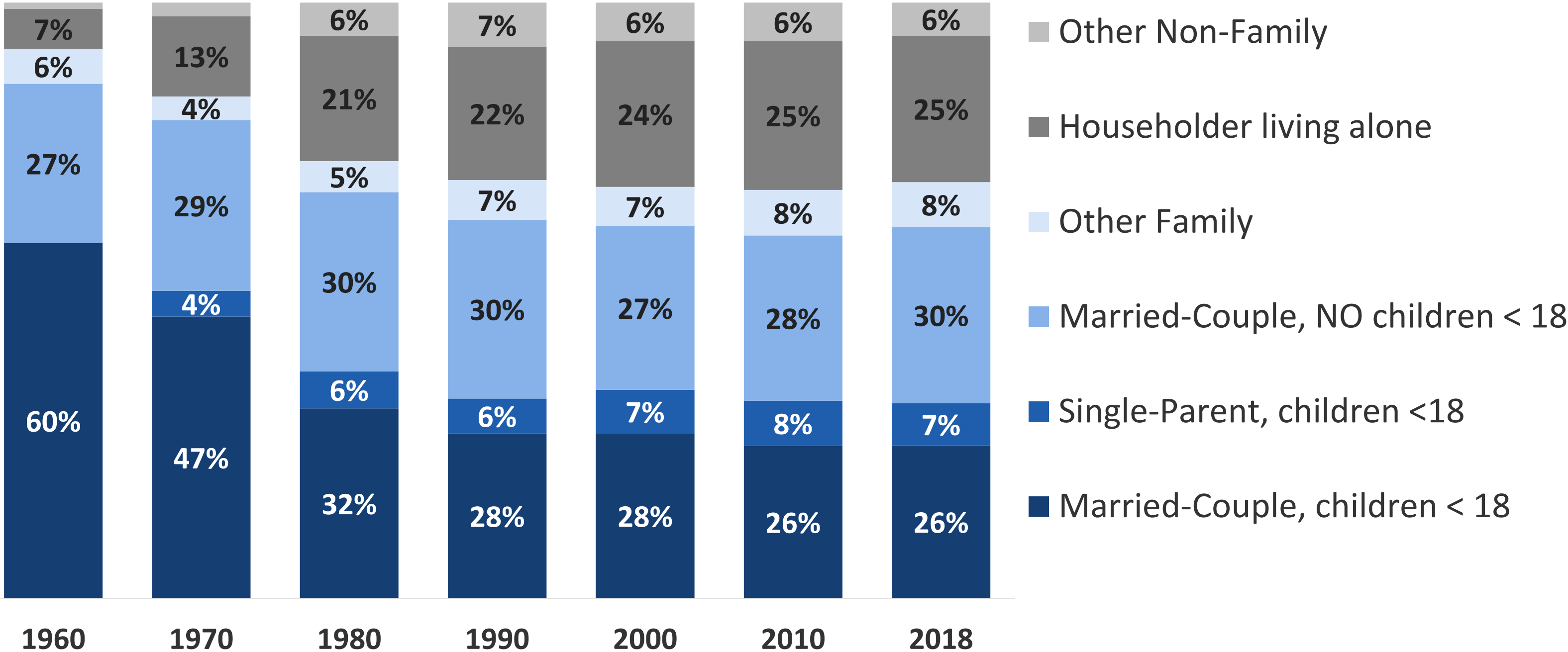
Median Household Income Change from 2007 to 2018 (constant 2018\$)



Source: U.S. Census Bureau, American Community Survey, 2007 & 2018, 1-year estimates.

Wider Variety of Household Types Since 1960, but Distribution Relatively Stable Since 1990

% of Households by Type



Source: 1960-2010 US Census, 2018 American Community Survey, 1-year estimate

Round 9.1 Cooperative Forecast



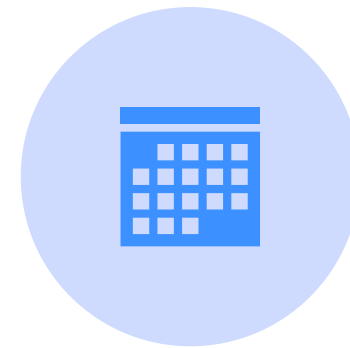
Projects population, household, and job growth, 2015-2045



Inherently regional and takes neighbor jurisdictions into account



Completed in the summer/fall of 2017, reflecting data and land-use known at that time



To be revised this summer/fall to reflect major land-use changes



To be replaced with Round 10.0 following the release of Census data

MWCOG Cooperative Forecasting

- Process for local governments to work together to develop regional long-range growth expectations, producing a forecast of people, households, and jobs (ongoing since 1976)
- Uses a regional econometric model and locally produced projections from individual jurisdictions, reconciled by the *Cooperative Forecasting and Data Subcommittee*
- Allows for minor revisions in between major forecasting “rounds”

Round 9.1 Cooperative Forecast Results



Growth, at lower rates in the largest jurisdictions like Montgomery County

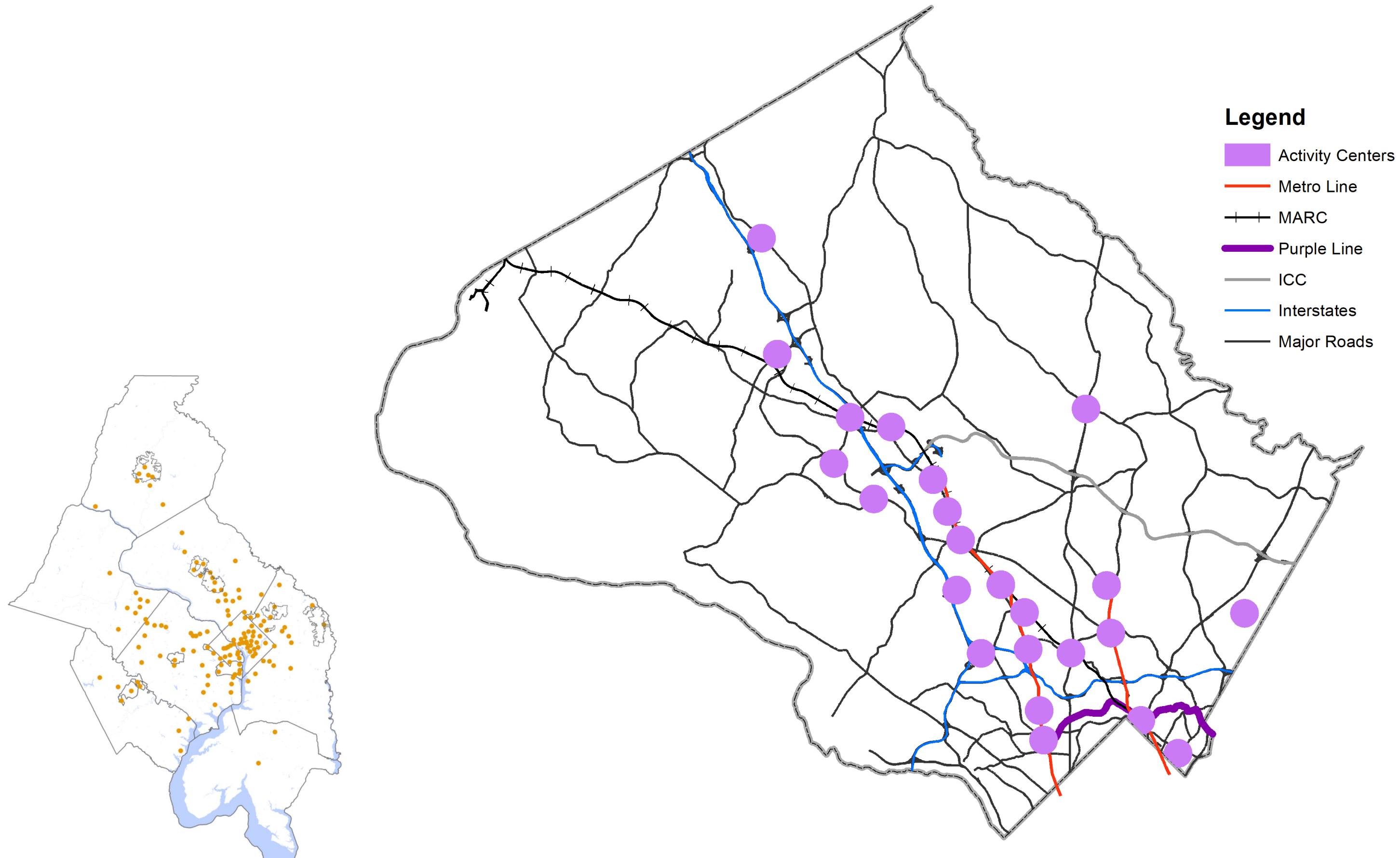


Continued dominance of large jurisdictions like Montgomery County

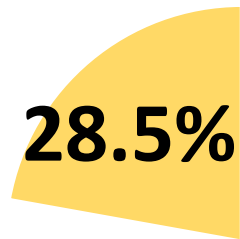


More concentrated growth, within regional “Activity Centers”

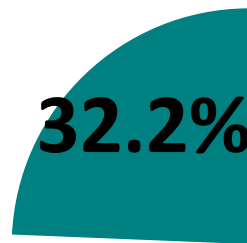
Activity Center-Focused Growth



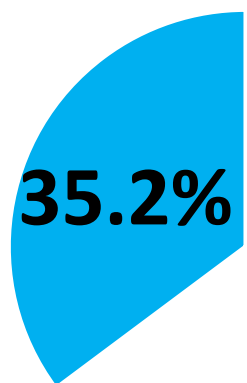
Forecasted Growth 2015-2045



Regional Population Growth of 28.5%

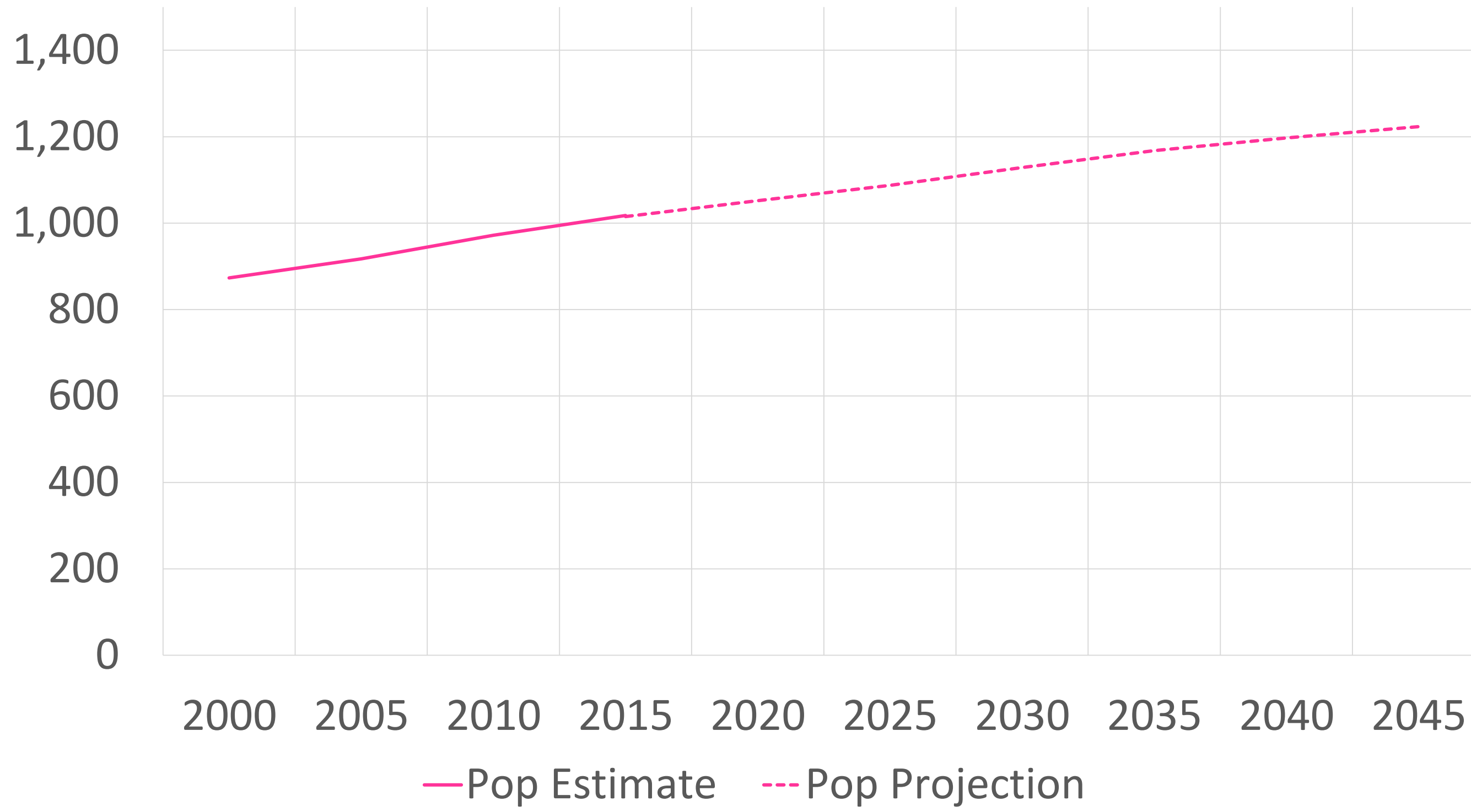


Regional Household Growth of 32.2%

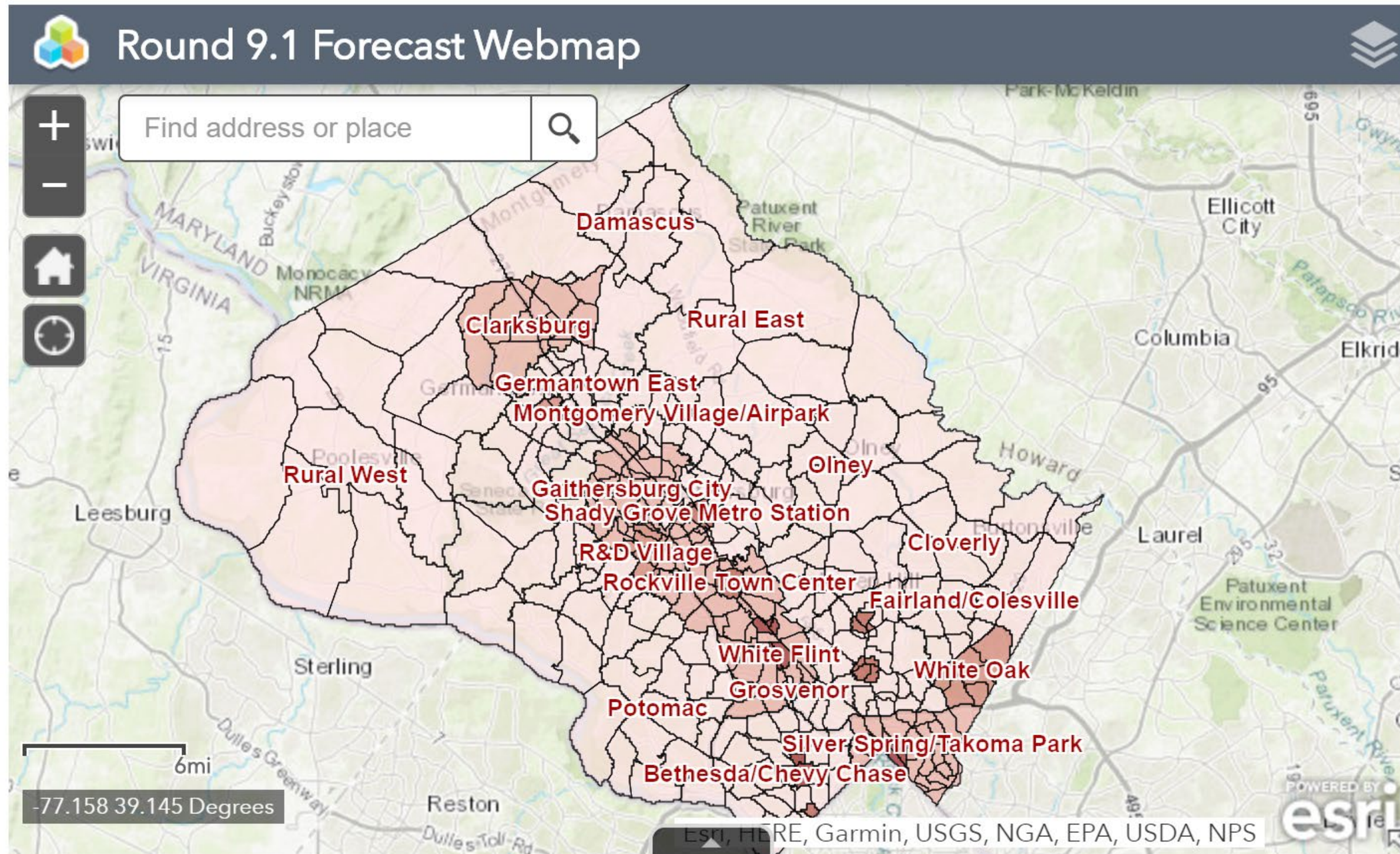


Regional Employment Growth of 35.2%

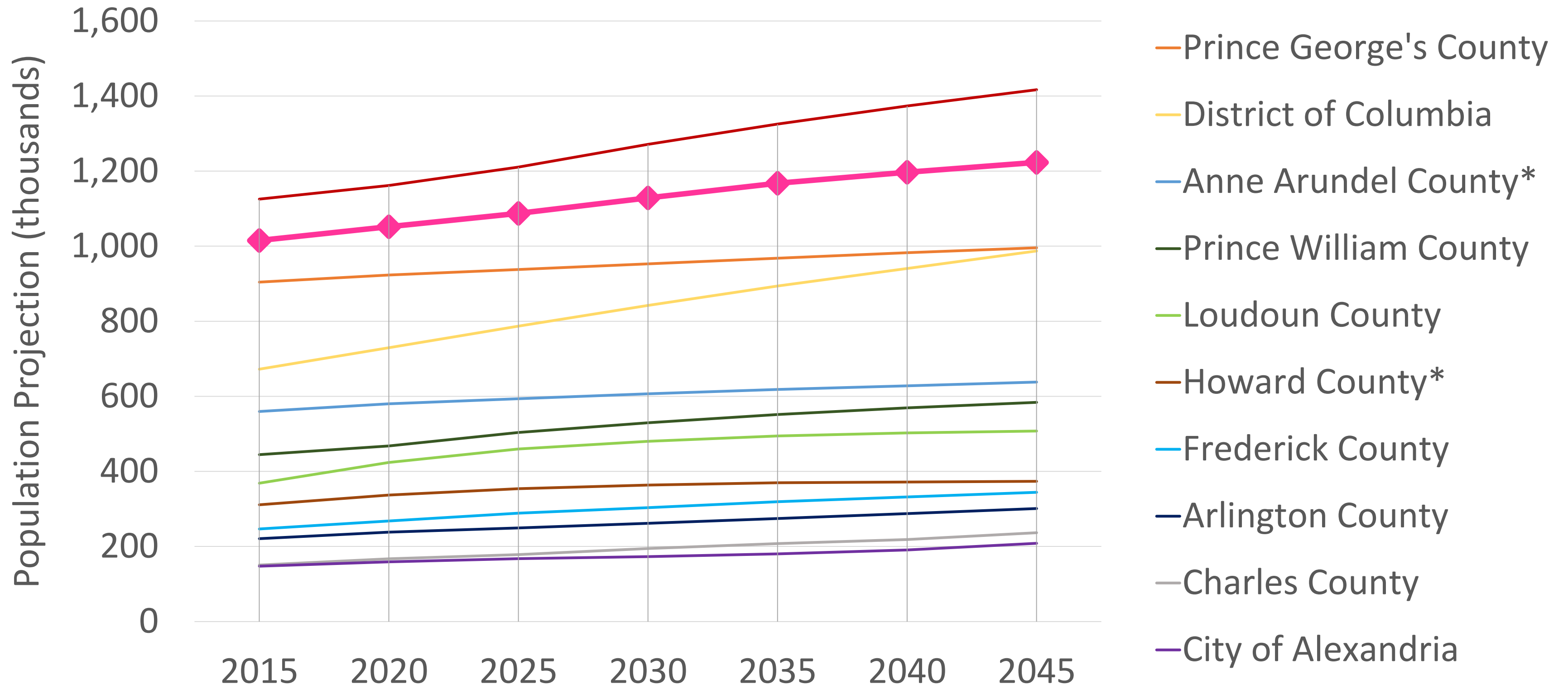
Montgomery County Population (thousands)



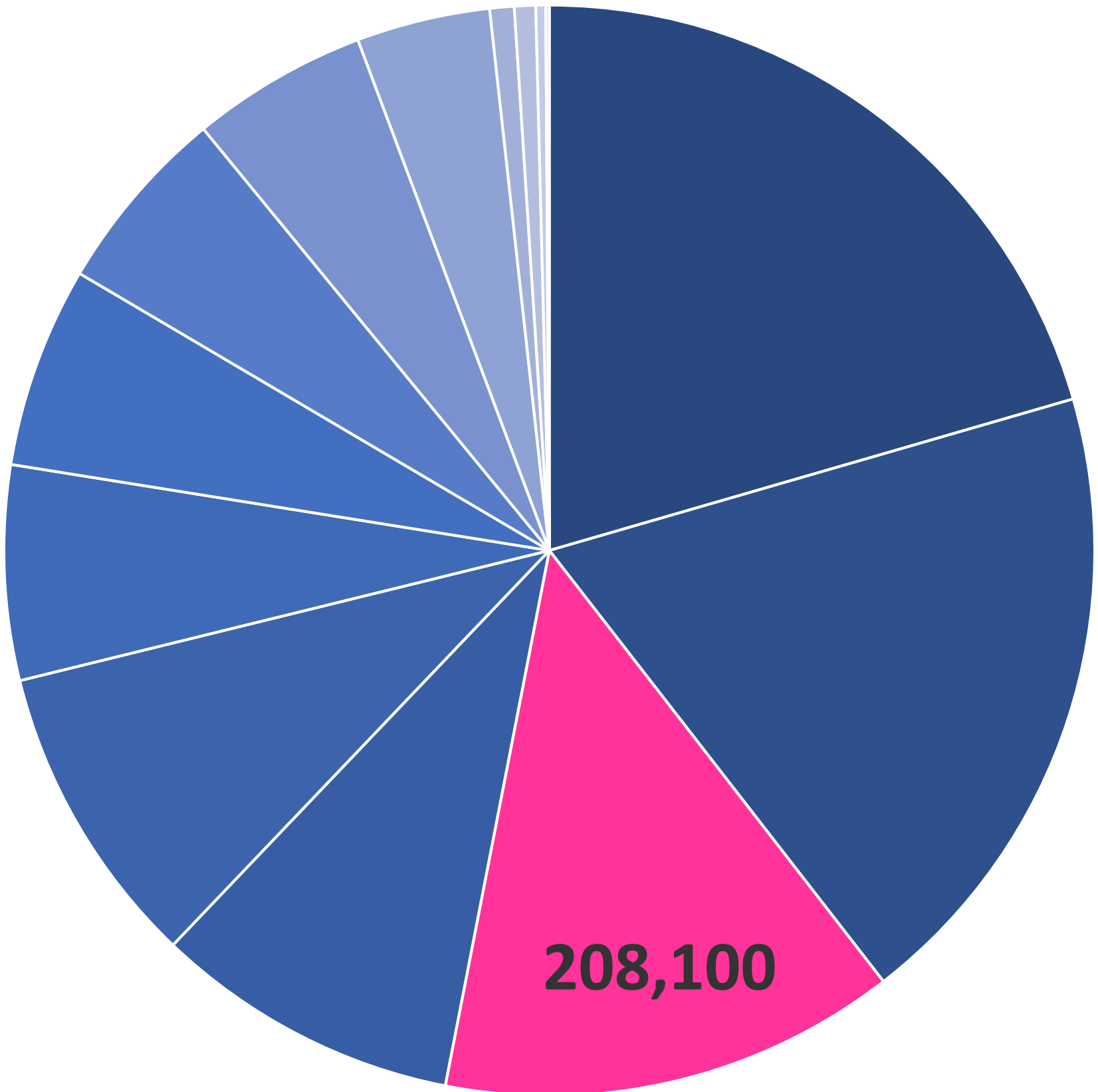
9.1 Forecast Webmap



Projected Population by Jurisdiction 2015-2045

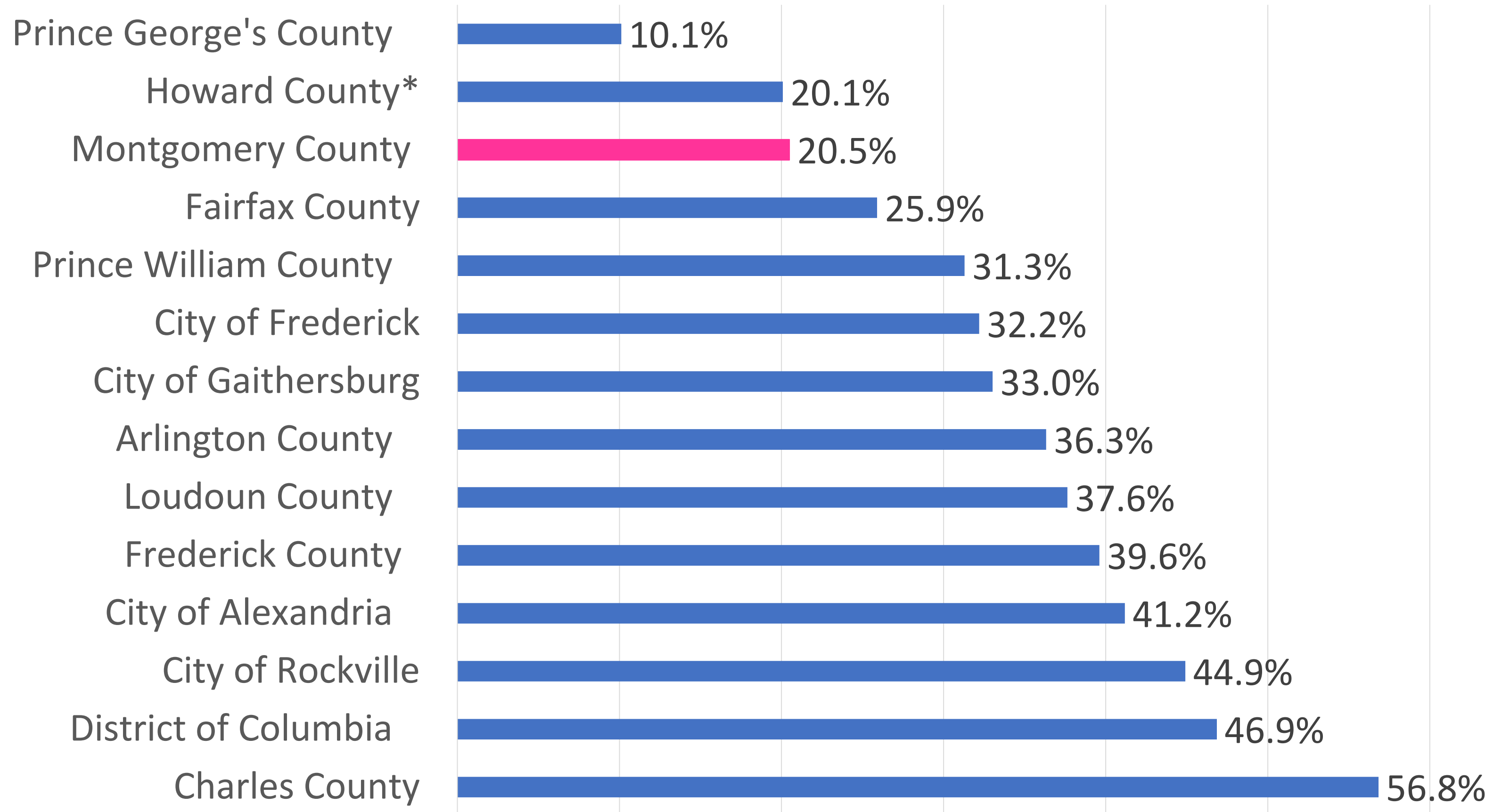


Additional People by Jurisdiction 2015-2045



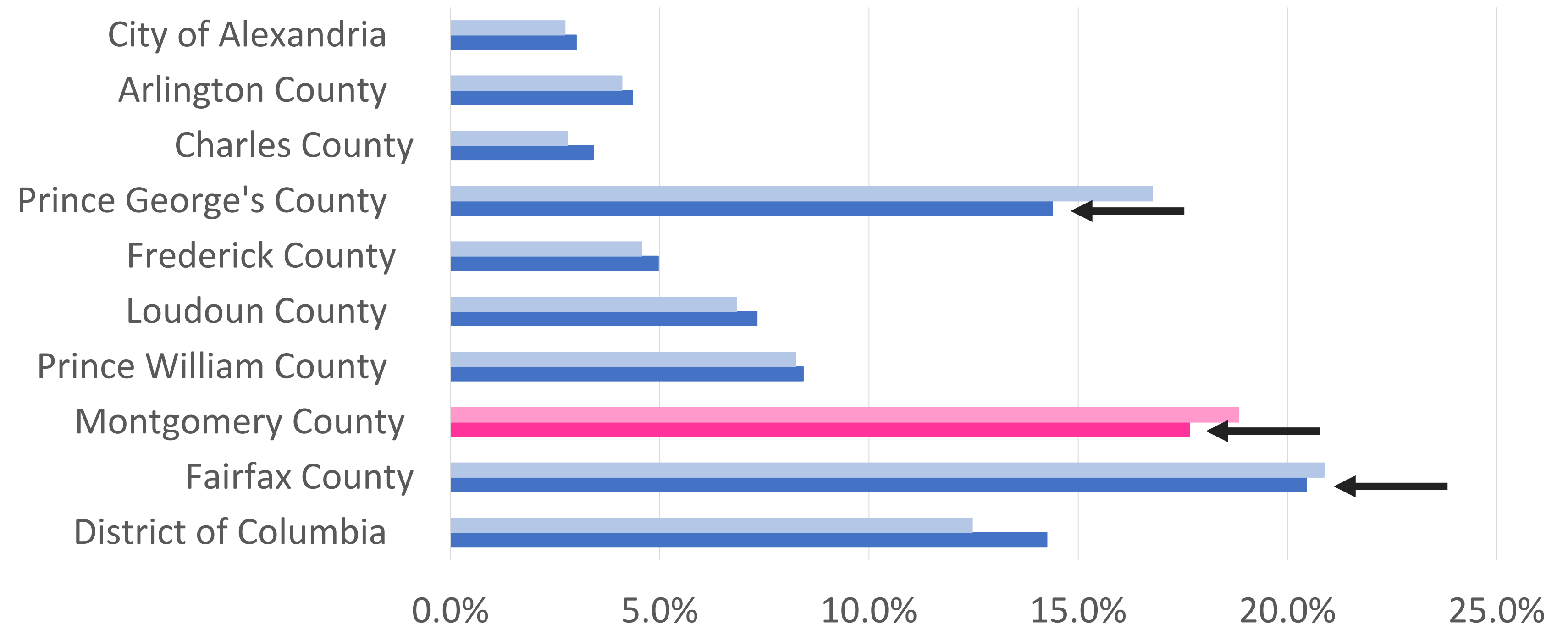
- District of Columbia
- Fairfax County
- Montgomery County
- Prince William County
- Loudoun County
- Frederick County
- Prince George's County
- Charles County
- Arlington County
- City of Alexandria
- City of Fairfax
- City of Manassas
- City of Falls Church
- City of Manassas Park

% Population Growth 2015-2045

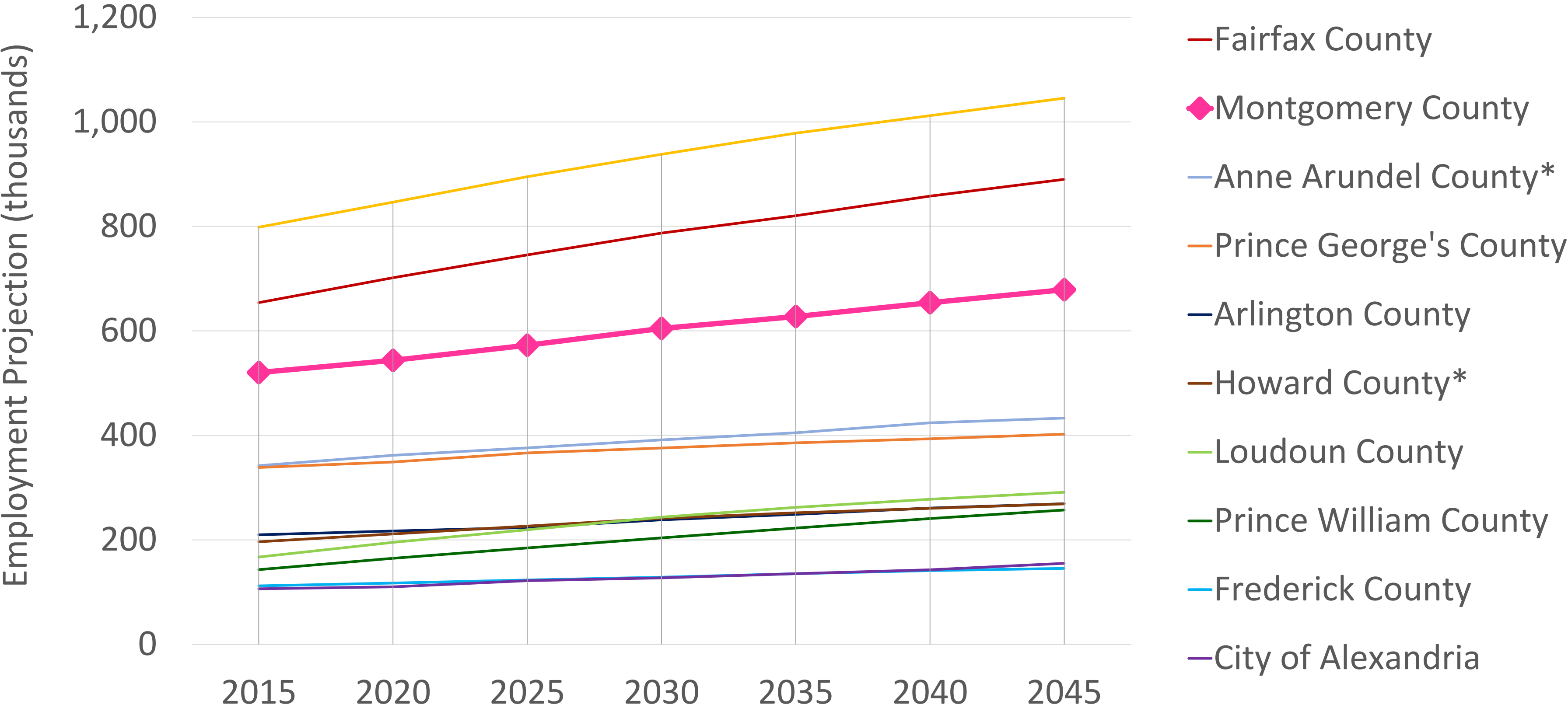


Share of the Total Regional Population in 2015 and 2045

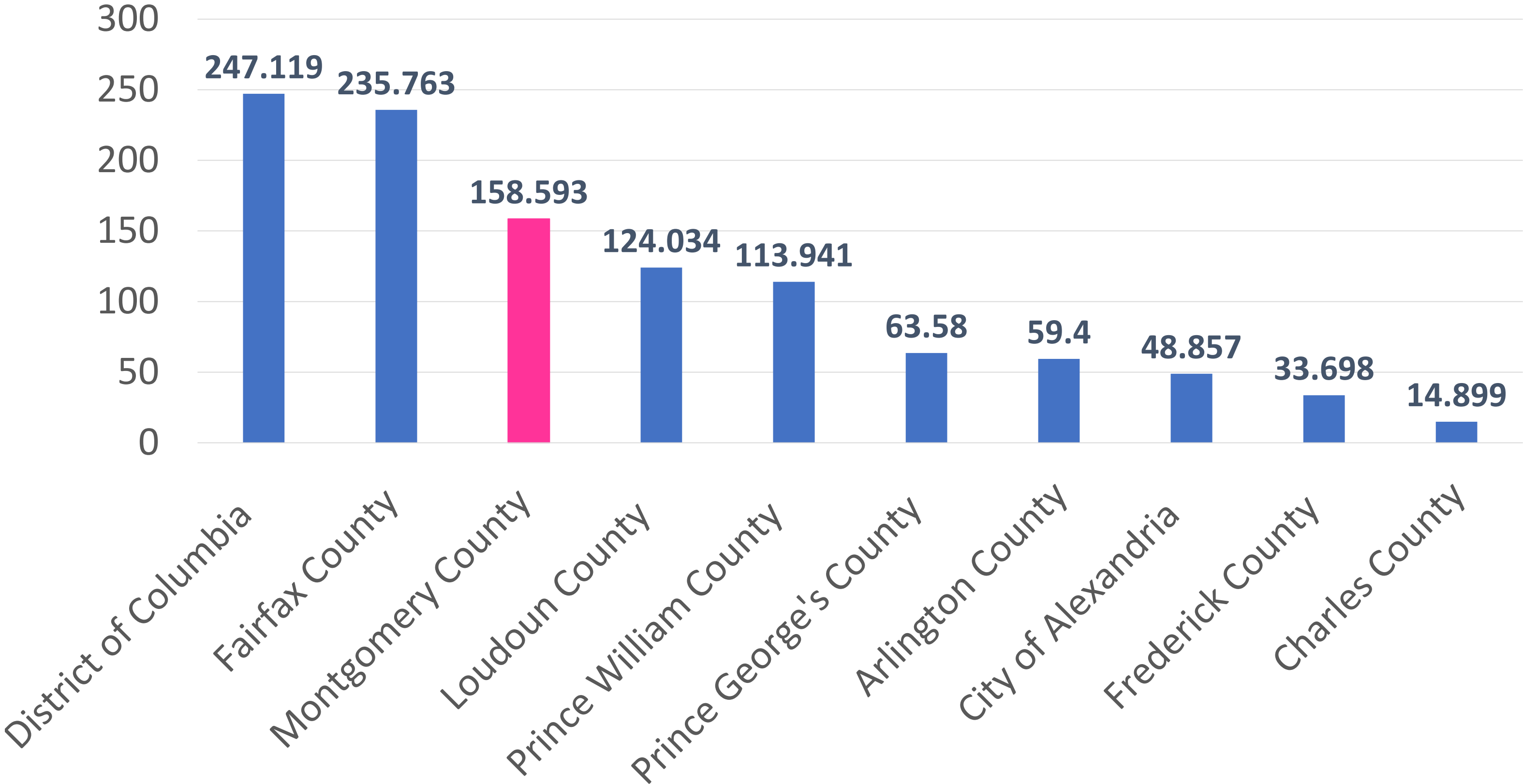
■ 2015 Share ■ 2045 Share



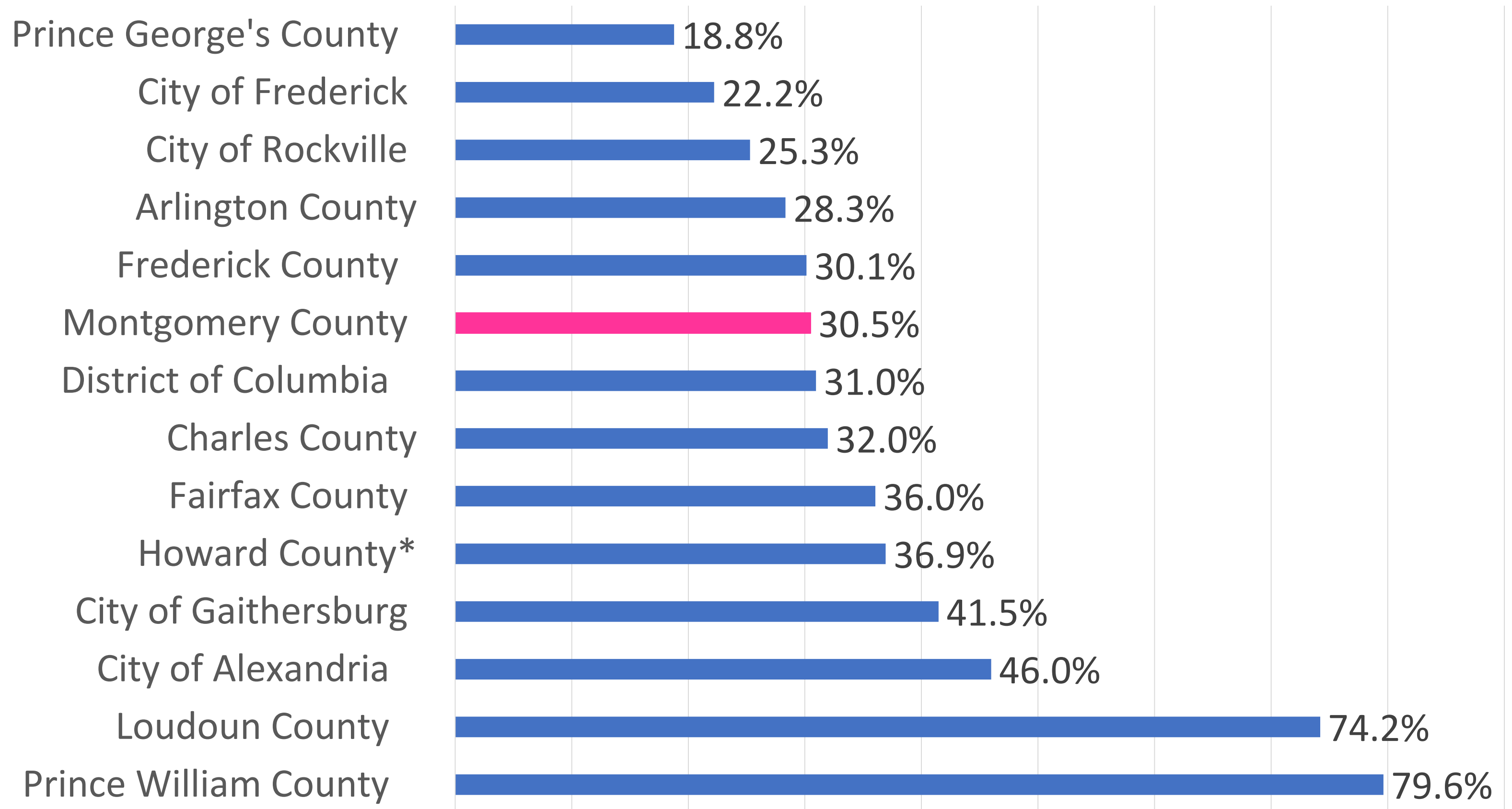
Projected Employment by Jurisdiction 2015-2045



Additional Jobs (thousands) 2015-2045

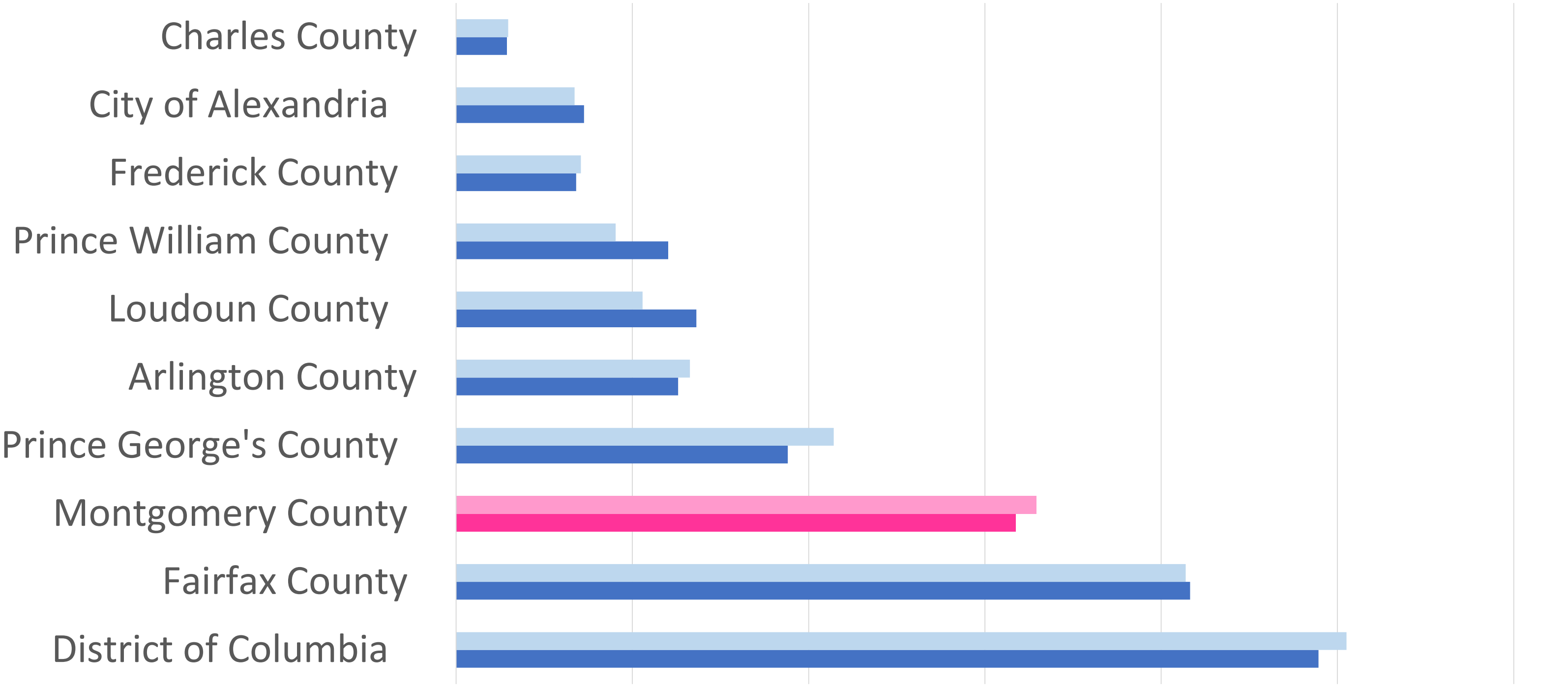


% Job Growth 2015-2045

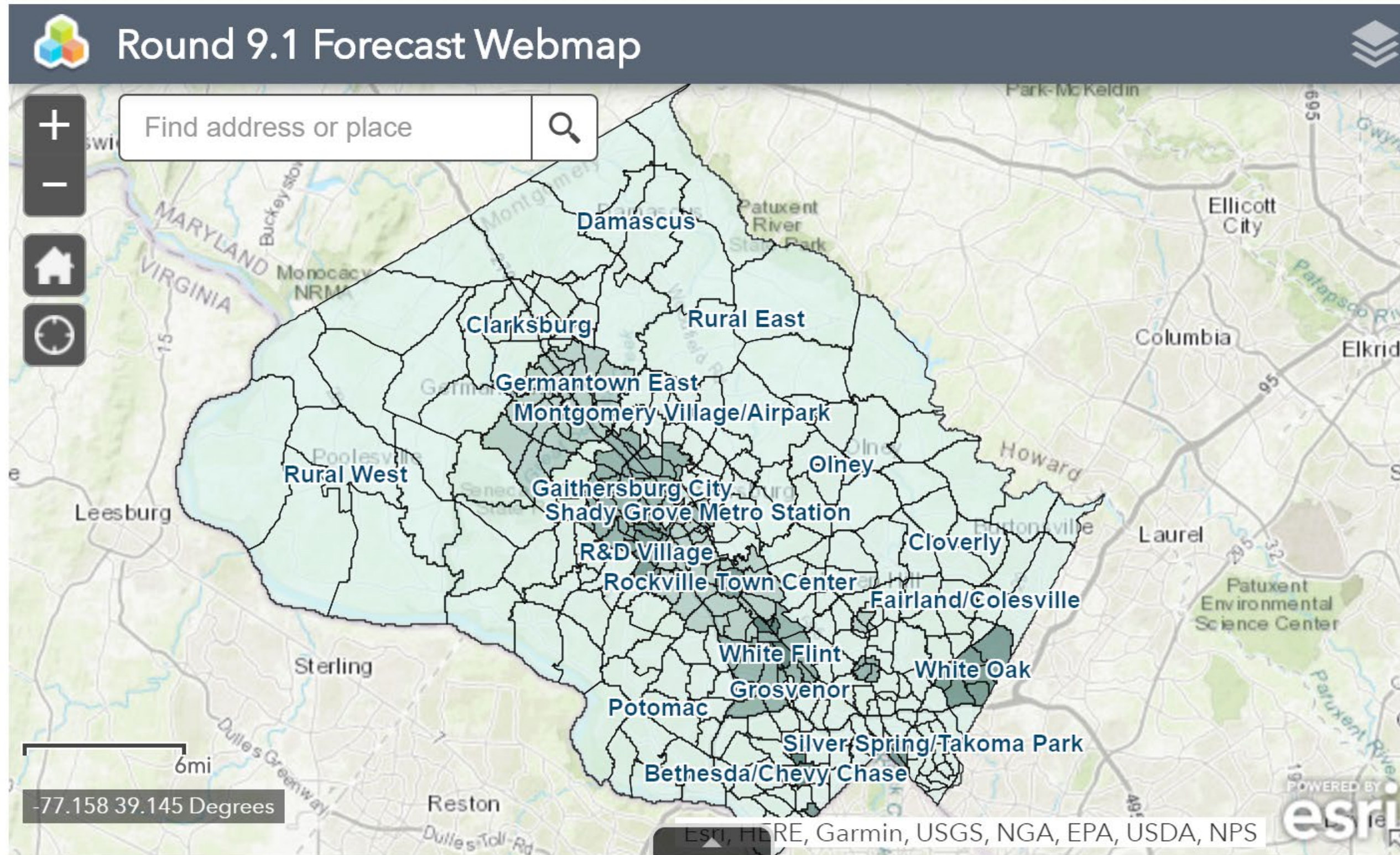


Share of the Total Regional Employment in 2015 and 2045

2015 Share 2045 Share



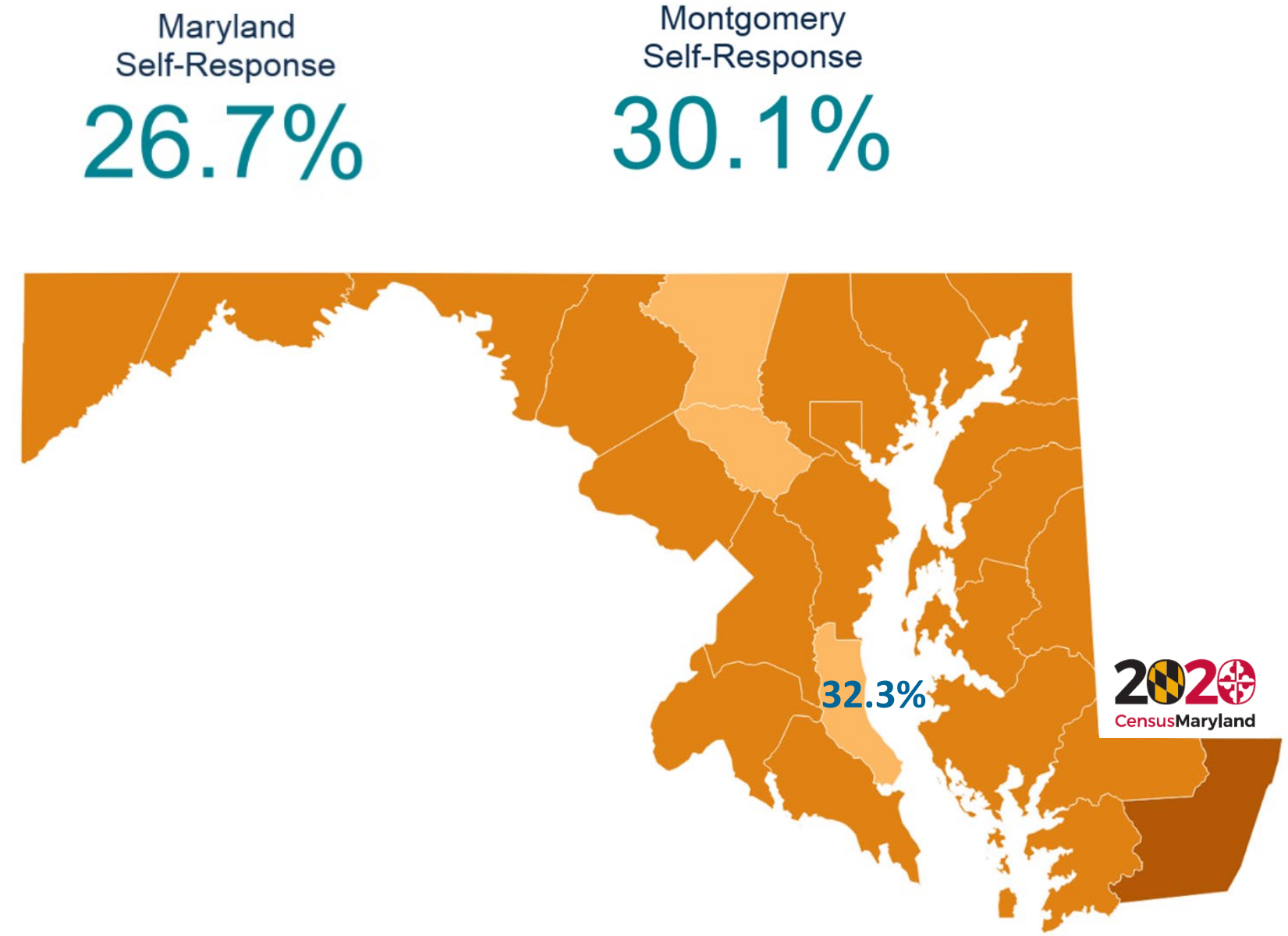
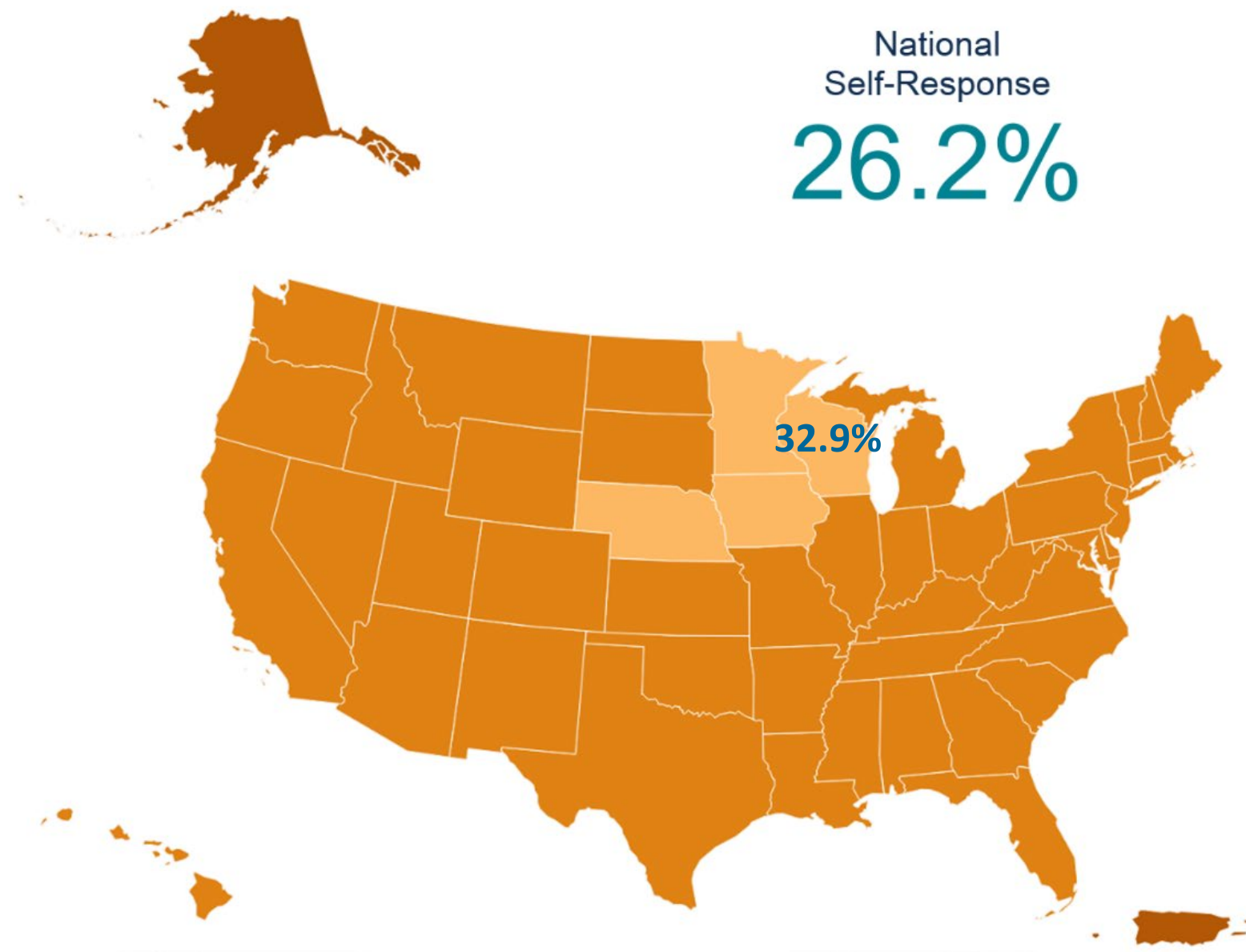
9.1 Forecast Webmap





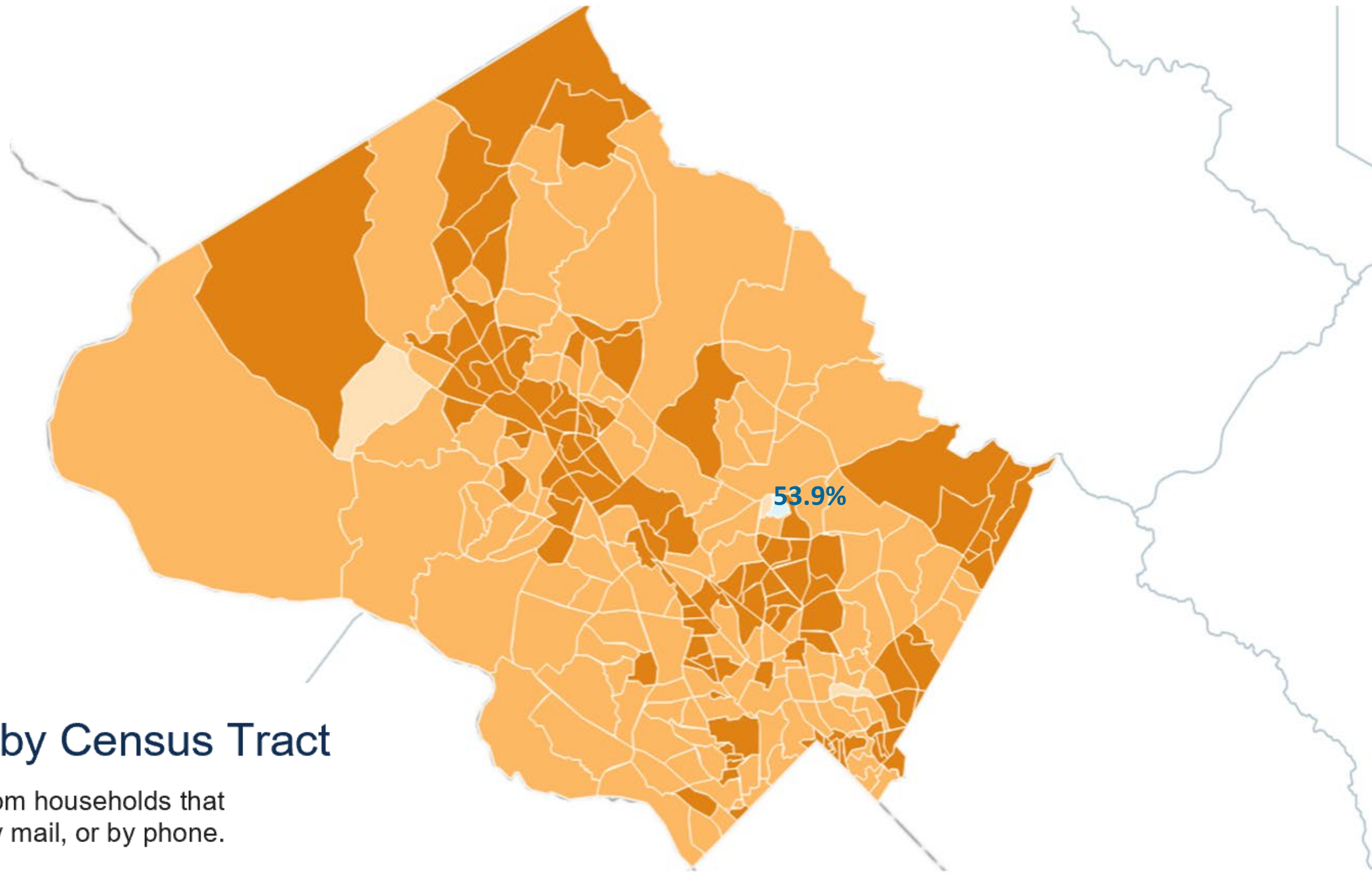
2020 Census Self-Response by State

This map features self-response rates from households that responded to the 2020 Census online, by mail, or by phone.



3/24/20

Montgomery
Self-Response
30.1%



2020 Census Self-Response by Census Tract

This map features self-response rates from households that responded to the 2020 Census online, by mail, or by phone.

