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

Most populous county in Maryland with over 1 million people since 2012
8% increase in population since 2010
38% gain between 1990 to 2018

Total Population, 1940-2018

Population Change 1990-2018 by Census Tract

Population Density Change
1990-2018
by Census Tract

Population Density
2018

Components of Population Growth
1991-2018

Source: U.S. Census Bureau, Population Estimate Program, 3/2019
Number of Births at Lowest Point since 1998

Natural Increase: Number of Births minus Deaths, 1960-2018

Birth Rates Decline Since 2007

Births per 1,000 Population


Growth Status and Trends
Increasing racial & ethnic diversity

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

<table>
<thead>
<tr>
<th>Predominant Racial or Ethnic Group</th>
<th>1990</th>
<th>2010</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>White Predominant (&gt;70% of tract population)</td>
<td>72.1%</td>
<td>49.3%</td>
<td>43.0%</td>
</tr>
<tr>
<td>White Majority (50% - 70%)</td>
<td>12.0%</td>
<td>17.0%</td>
<td>19.9%</td>
</tr>
<tr>
<td>Black Majority (50% - 70%)</td>
<td>7.4%</td>
<td>13.9%</td>
<td>14.5%</td>
</tr>
<tr>
<td>Other Race</td>
<td>8.1%</td>
<td>3.2%</td>
<td>4.6%</td>
</tr>
<tr>
<td>N-H Asian &amp; Pacific Isl.</td>
<td>16.6%</td>
<td>18.1%</td>
<td></td>
</tr>
<tr>
<td>N-H Black or African Am.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hispanic</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Non-Hispanic White</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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%)
Youthful Minorities and Aging White Baby Boomers

Race & Hispanic Origin by Age (2018)

<table>
<thead>
<tr>
<th>Race &amp; Hispanic Origin</th>
<th>Montgomery</th>
<th>White, not Hispanic</th>
<th>Hispanic</th>
<th>Black</th>
<th>Asian</th>
</tr>
</thead>
<tbody>
<tr>
<td>65+</td>
<td>16%</td>
<td>22%</td>
<td>7%</td>
<td>11%</td>
<td>15%</td>
</tr>
<tr>
<td>45-64</td>
<td>27%</td>
<td>30%</td>
<td>21%</td>
<td>25%</td>
<td>30%</td>
</tr>
<tr>
<td>30-44</td>
<td>20%</td>
<td>17%</td>
<td>17%</td>
<td>22%</td>
<td>24%</td>
</tr>
<tr>
<td>18-29</td>
<td>14%</td>
<td>12%</td>
<td>17%</td>
<td>17%</td>
<td>13%</td>
</tr>
<tr>
<td>&lt;18</td>
<td>23%</td>
<td>18%</td>
<td>31%</td>
<td>25%</td>
<td>18%</td>
</tr>
<tr>
<td>Median Age:</td>
<td>39.2</td>
<td>47.2</td>
<td>31.3</td>
<td>35.6</td>
<td>42.2</td>
</tr>
</tbody>
</table>

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

## 2018 Median Household Income

<table>
<thead>
<tr>
<th>Location</th>
<th>Median Income</th>
</tr>
</thead>
<tbody>
<tr>
<td>Loudoun</td>
<td>$139,915</td>
</tr>
<tr>
<td>Arlington</td>
<td>$122,394</td>
</tr>
<tr>
<td>Fairfax</td>
<td>$122,227</td>
</tr>
<tr>
<td>Howard</td>
<td>$116,984</td>
</tr>
<tr>
<td>Montgomery</td>
<td><strong>$108,188</strong></td>
</tr>
<tr>
<td>DC Metro Area</td>
<td>$102,180</td>
</tr>
<tr>
<td>Alexandria</td>
<td>$101,215</td>
</tr>
<tr>
<td>Frederick</td>
<td>$95,850</td>
</tr>
<tr>
<td>District of Columbia</td>
<td>$85,203</td>
</tr>
<tr>
<td>Maryland</td>
<td>$83,242</td>
</tr>
<tr>
<td>Prince George's</td>
<td>$83,034</td>
</tr>
<tr>
<td>United States</td>
<td>$61,937</td>
</tr>
</tbody>
</table>

*Source: 2018 American Community Survey, 1-year estimate, U.S. Census Bureau*
After decades of income growth, slow recovery post-recession

Median Household Income (constant 2018 dollars)

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$)

- Washington, D.C.: $19,259
- Loudoun, VA: $9,760
- Arlington County, VA: $7,210
- Alexandria, VA: $3,112
- Frederick, MD: $2,335
- Washington Metro Area: $1,171
- Maryland: $589
- United States: $336
- Virginia: $266
- Prince George's, MD: $29
- MONTGOMERY, MD: -$3,304
- Fairfax, VA: -$5,541
- Howard, MD: -$6,451

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

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

- Washington, D.C.: 29.2%
- Loudoun, VA: 7.5%
- Arlington County, VA: 6.3%
- Alexandria, VA: 3.2%
- Frederick, MD: 2.5%
- Washington Metro Area: 1.2%
- Maryland: 0.7%
- United States: 0.5%
- Virginia: 0.4%
- Prince George's, MD: 0.0%
- MONTGOMERY, MD: -3.0%
- Fairfax, VA: -4.3%
- Howard, MD: -5.2%

Income is unequally distributed by race and ethnicity

2018 Median Household Income

- Hispanic or Latinx origin: $76,805
- Black or African American: $80,484
- All households: $108,188
- Asian: $115,387
- White, not Hispanic: $131,533

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

<table>
<thead>
<tr>
<th></th>
<th>Median Household Income Change from 2007 to 2018 (constant 2018$)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Asian</td>
<td>$7,935</td>
</tr>
<tr>
<td>Black</td>
<td>$6,258</td>
</tr>
<tr>
<td>Non-Hispanic White</td>
<td>-$1,222</td>
</tr>
<tr>
<td>All households</td>
<td>-$3,304</td>
</tr>
<tr>
<td>Hispanic/Latinx</td>
<td>-$5,261</td>
</tr>
</tbody>
</table>

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

% of Households by Type

- Other Non-Family
- Householder living alone
- Other Family
- Married-Couple, NO children < 18
- Single-Parent, children <18
- Married-Couple, children < 18

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%
9.1 Forecast Webmap
Projected Population by Jurisdiction 2015-2045

Population Projection (thousands)

- Fairfax County
- Montgomery County
- Prince George's County
- District of Columbia
- Anne Arundel County*
- Prince William County
- Loudoun County
- Howard County*
- Frederick County
- Arlington County
- Charles County
- City of Alexandria

Growth Status and Trends
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

208,100
% Population Growth 2015-2045

- Prince George's County: 10.1%
- Howard County*: 20.1%
- Montgomery County: 20.5%
- Fairfax County: 25.9%
- Prince William County: 31.3%
- City of Frederick: 32.2%
- City of Gaithersburg: 33.0%
- Arlington County: 36.3%
- Loudoun County: 37.6%
- Frederick County: 39.6%
- City of Alexandria: 41.2%
- City of Rockville: 44.9%
- District of Columbia: 46.9%
- Charles County: 56.8%
Share of the Total Regional Population in 2015 and 2045

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

2015 Share vs. 2045 Share

- Montgomery County shows a significant increase in share.
- Prince George's County shows a noticeable increase.
- All other counties show either a slight increase or decrease in share.
Additional Jobs (thousands)
2015-2045

- District of Columbia: 247,119
- Fairfax County: 235,763
- Montgomery County: 158,593
- Loudoun County: 124,034
- Prince William County: 113,941
- Prince George’s County: 63.58
- Arlington County: 59.4
- City of Alexandria: 48,857
- Frederick County: 33,698
- Charles County: 14,899
% Job Growth 2015-2045

- Prince George's County: 18.8%
- City of Frederick: 22.2%
- City of Rockville: 25.3%
- Arlington County: 28.3%
- Frederick County: 30.1%
- Montgomery County: 30.5%
- District of Columbia: 31.0%
- Charles County: 32.0%
- Fairfax County: 36.0%
- Howard County*: 36.9%
- City of Gaithersburg: 41.5%
- City of Alexandria: 46.0%
- Loudoun County: 74.2%
- Prince William County: 79.6%
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.
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.