

Forecasting DC's Growth



DC Office of Planning

Presentation to

MoveDC's Transportation Planning
Advisory Committee

June 26, 2013



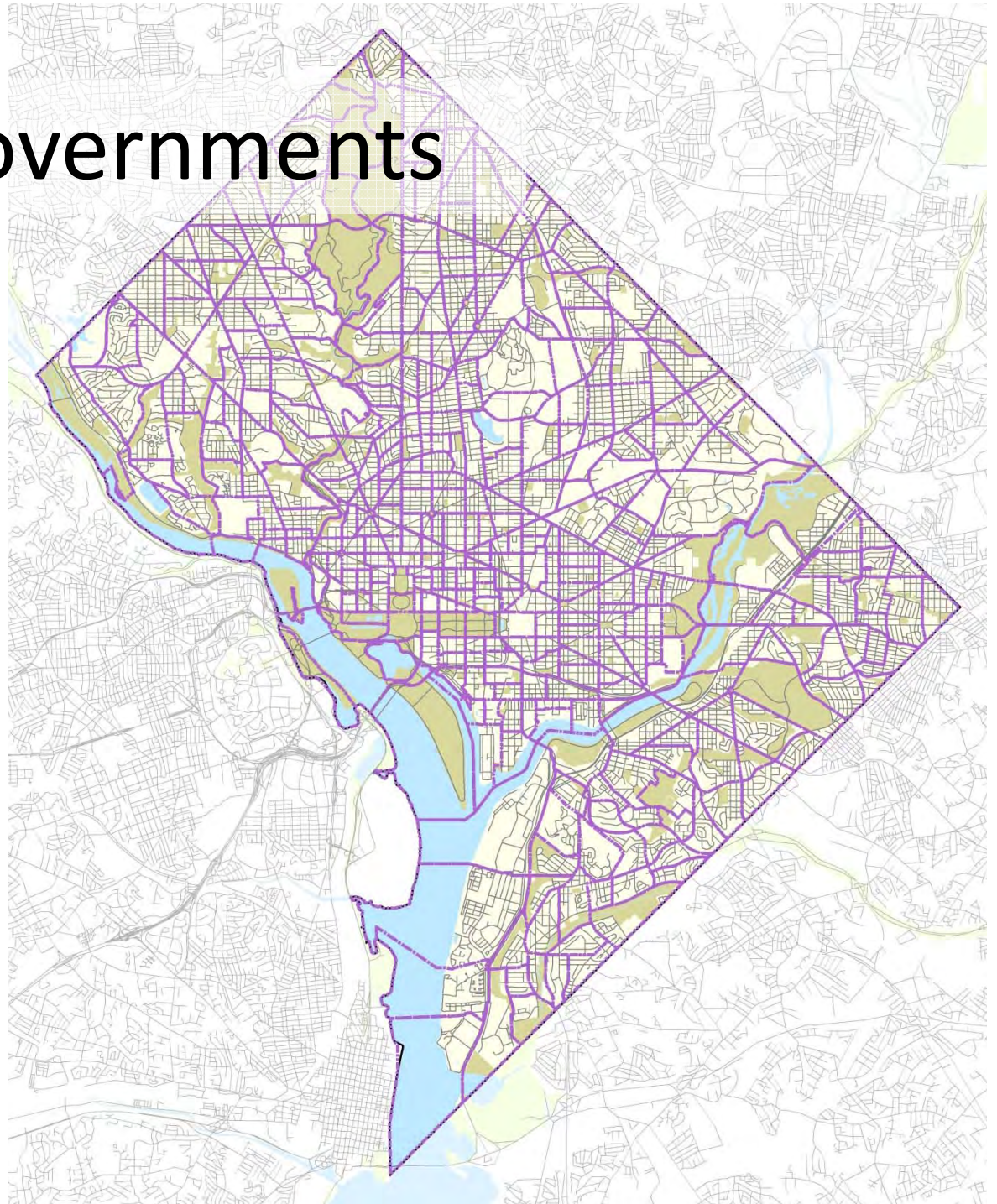
Government of the District of Columbia
Vincent C. Gray, Mayor



Council of Governments

Cooperative Forecasts

- 2010 Base Year
- 5 year increments
2010 to 2040
- 393 Traffic Analysis
Zones (TAZ) in DC
- Jobs, Households,
Population
- OP uses a supply side
methodology adjusted
by select demand
trends



Tracking New Supply

What:

- Projects of 10 units or 10,000 SqFt of Non-Residential
- Land Use (Single/Multi-Family, Office, Industrial, Public/Institutional)
- Type of Construction (Demolition, New Construction, Vacant Rehab)

| | Projects | Units | SqFt Non-Res | Hotel Rooms |
|----------------------|-----------|---------------|-------------------|--------------|
| Completed since 2000 | 631 | 31,639 | 41,656,780 | 2,620 |
| Under construction | 100 | 13,641 | 11,943,825 | 2,430 |
| Planned | 117 | 16,838 | 8,385,734 | 1,292 |
| Conceptual | 150 | 13,889 | 16,767,584 | 2,200 |
| New Neighborhoods | <u>16</u> | <u>16,491</u> | <u>14,300,961</u> | <u>1,300</u> |
| Totals | 1,014 | 92,498 | 93,054,884 | 9,842 |

Current Assumptions

Quantitative

- Growth Absorption
 - Recently Completed and Under Construction by 2015
 - Planned by 2020
 - Conceptual by 2025
 - New Neighborhoods by 2020-2030
 - Remaining vacant land at current zoning 2035-2040
- All space is back filled/vacancy held constant
- Jobs per square feet of development

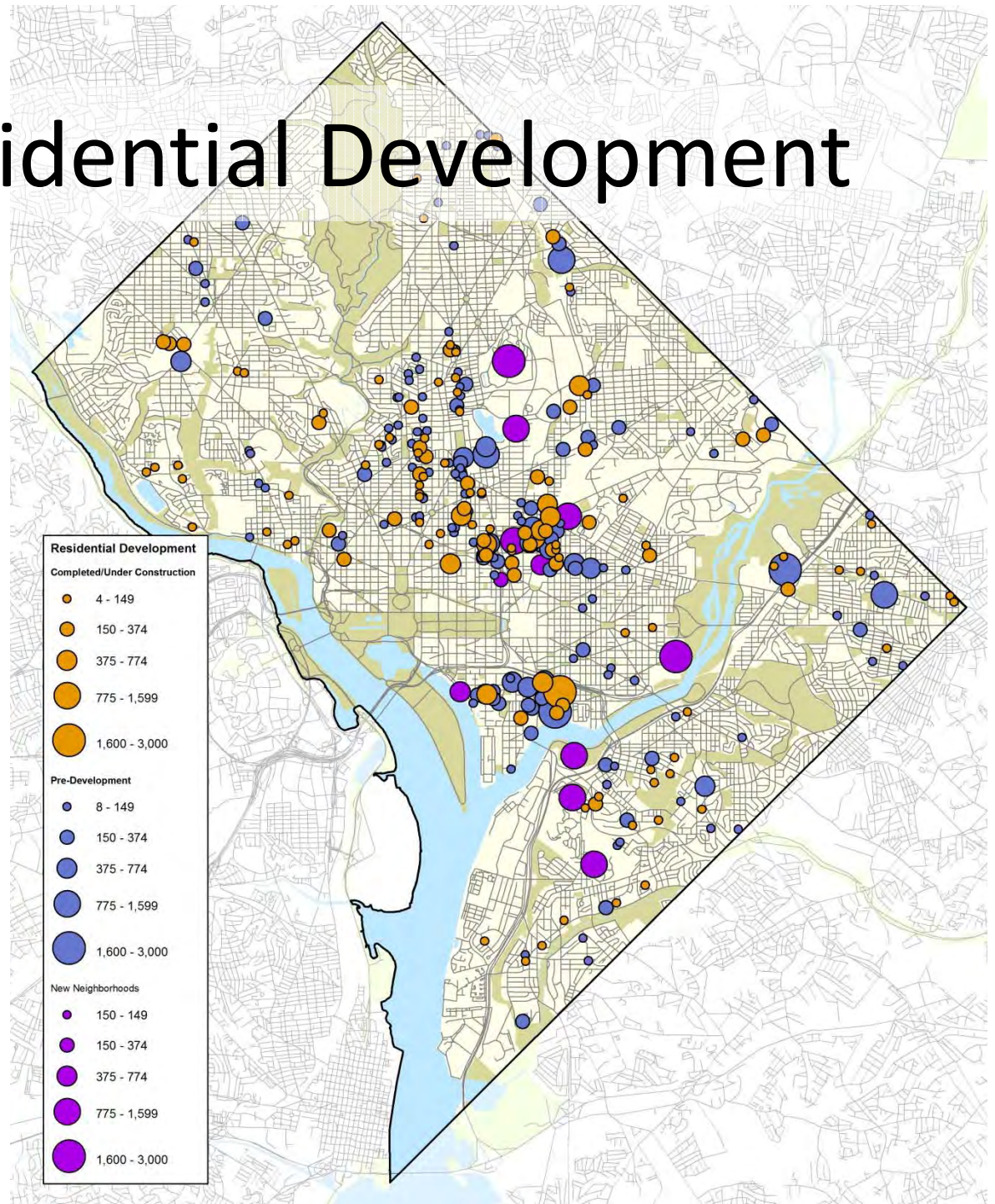
Qualitative

- Internal migration
- Impacts of hoteling/telecommuting
- Smaller households sizes vs. births & universal pre-school
- Retiring baby boomers replaced by younger labor force

Mapping Residential Development

Vacancy Rates and Average Household Size by Tenure/Land Use are applied to the number of units to estimate households and population (including group quarters)

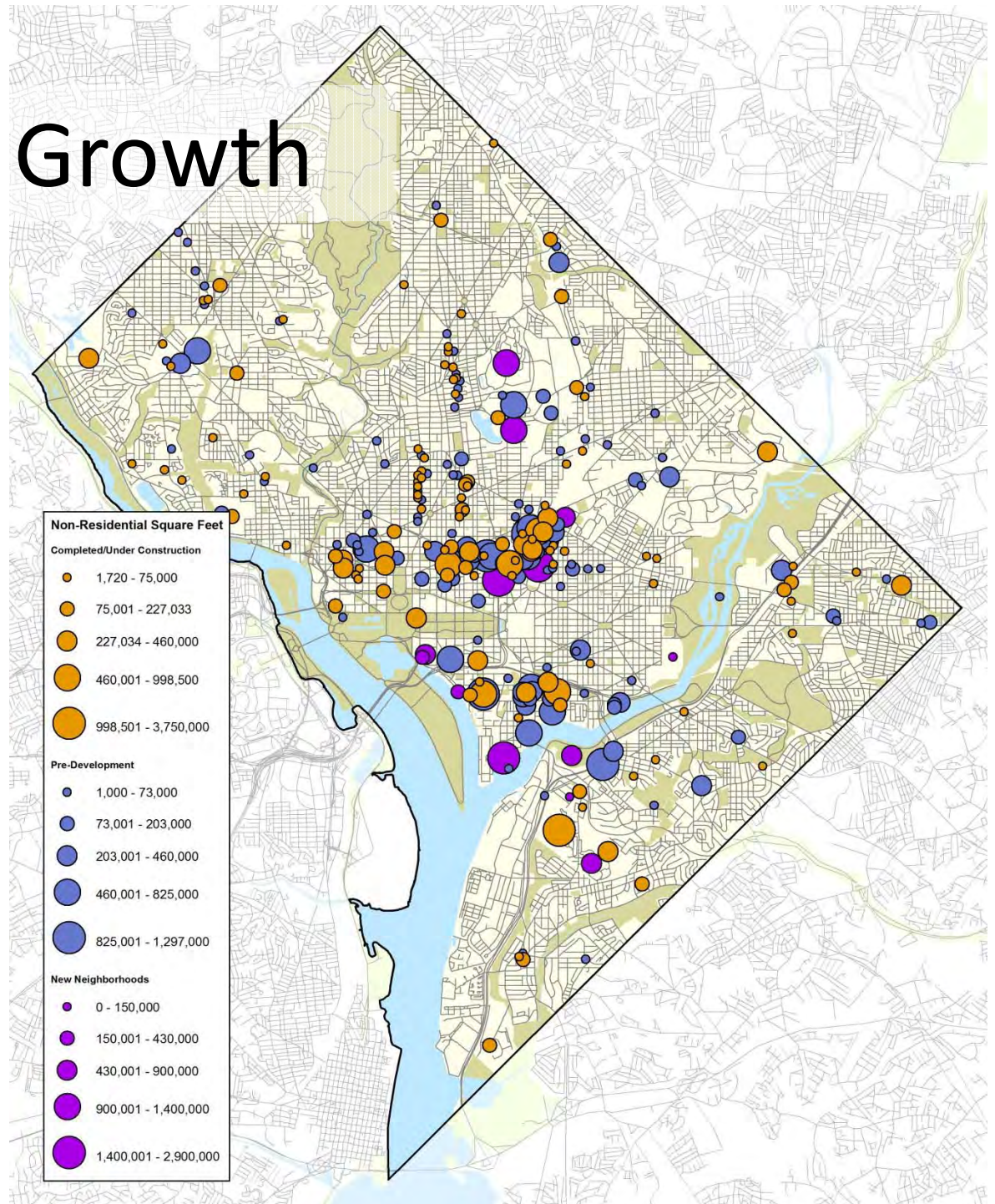
System has been fairly accurate city wide over the short term



Mapping Job Growth

Vacancy Rates and Average jobs per square foot by Land Use are applied to the number of square feet to estimate jobs

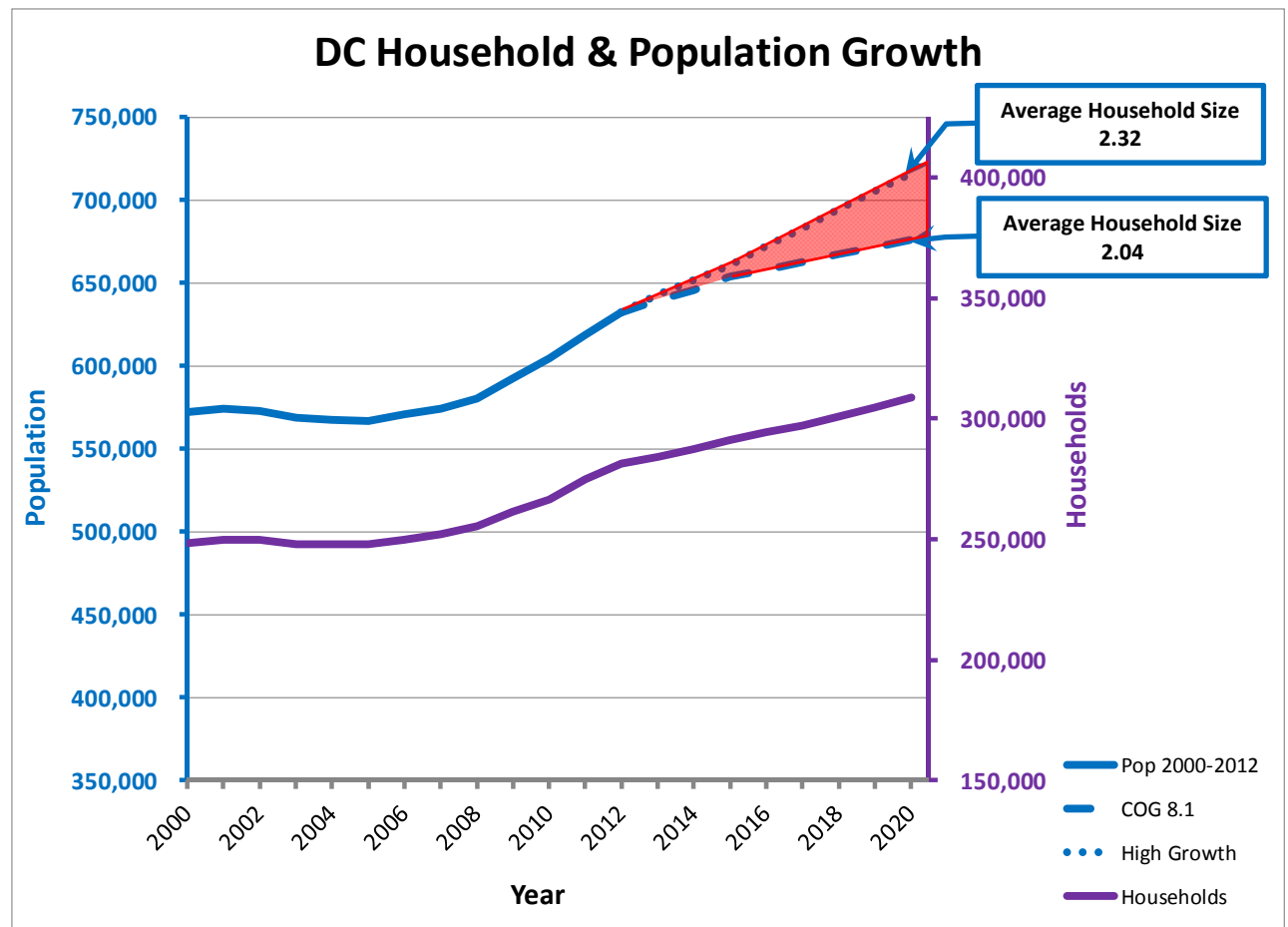
Job growth has been harder to forecast accurately due to National recession and shifts in federal employment



Next Round of Forecasts

OP Forecasts

- COG 8.1 prior to US Census 2012 estimate revision of DC Population
- High Growth considers recent increases in births and impact of Universal Pre-School on families in the District
- 35,000 New Households by 2020



Source: ACS 2008-2010, DC Office of Planning.