

Montgomery County Trends

A Look at People, Housing and Jobs Since 1990

JANUARY 2019

The Montgomery County General Plan is the long-term planning guide that establishes an overall vision and set of values about how the county should grow over decades. The last refinement was completed in 1993. In preparation to update the General Plan, the Planning Department's Research and Special Projects Division conducted a study of demographic, housing and employment changes in the county since the last update.

Key Changes Since 1990



POPULATION

- 38% population increase to 1.06 million people
- 5.1 year increase in median age from 33.9 years to 39 years
- 28 percentage point increase in the percentage of people of color (28% to 56%)
- 14 percentage point increase in the foreign born population (19% to 33%)
- Median household income (\$99,763) approximately the same when adjusted for inflation



HOUSING

- 32% increase in the number of housing units from 295,723 to 390,563
- 25% increase in the number of single family units
- 49% increase in the number of multifamily units
- 3.2 percentage point decline in the homeownership rate (67.9% to 64.7%)
 - 17 percentage point decline in the homeownership rate for people younger than 35
 - 9 percentage point increase in the homeownership rate for people older than 75
- 3 percentage point increase in the percentage of renters (32% to 35%)
- Housing costs have outpaced income growth with rents increasing by approximately 50% adjusting for inflation and for sale prices increasing by approximately 40%
- Demand for down-county single family homes has resulted in 4,400 single family tear down permits (51% in Bethesda) with a 1-1 replacement, but very limited multifamily redevelopment--only 6 projects, resulting in a net gain of 1,028 units



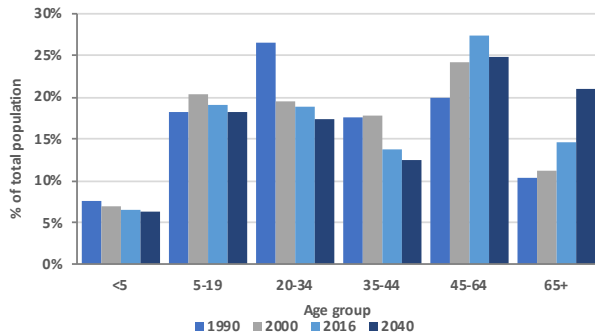
EMPLOYMENT

- 31% increase in the size of the labor force to nearly 600,000 residents
- 29% increase in the working age population to 674,000
- 6 minute increase in the average commute time to 35 minutes
- 2.4 percentage point decline in percentage of people driving alone to work to 65.3%
- 2.9 percentage point increase in percentage of people taking transit to 15.5%
- 21% increase in the number of jobs located in the county to 460,000 jobs
- 111% increase in the number of health and social assistance industry jobs in the county
- 17.7 million additional square feet of commercial office space

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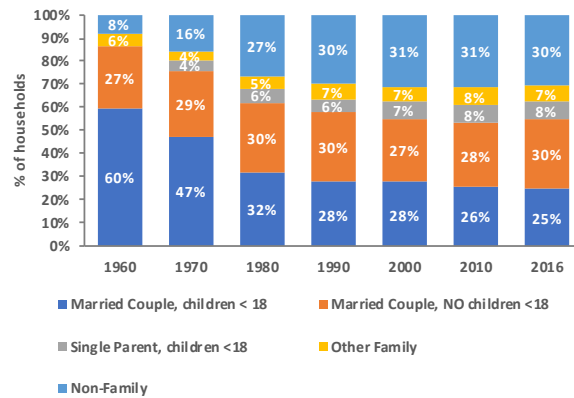
Forecasted decline in share of peak wage-earners, 45 to 64, and increase of older adults age 65+

Percentage of Population by Age Group

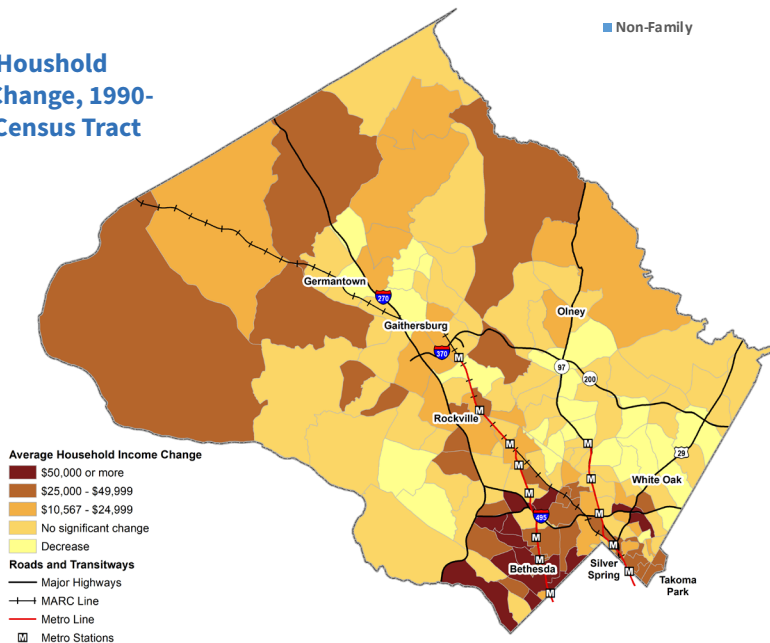


Share of married couples with children under 18 decreased to less than half of the 1960 levels

Household Types, 1960-2016

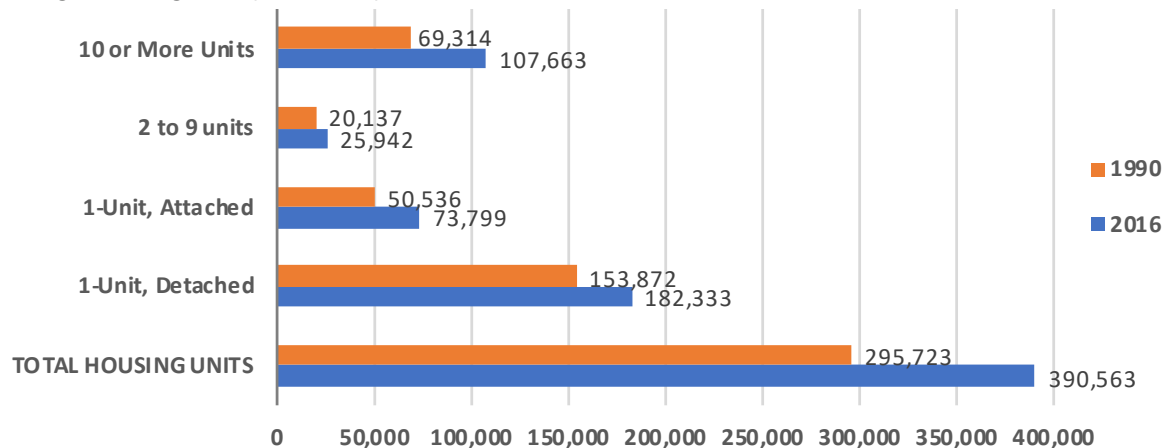


Average Household Income Change, 1990-2016 By Census Tract



Largest percentage increase in units in buildings with 10+ units

Change in Housing Units by Structure Type

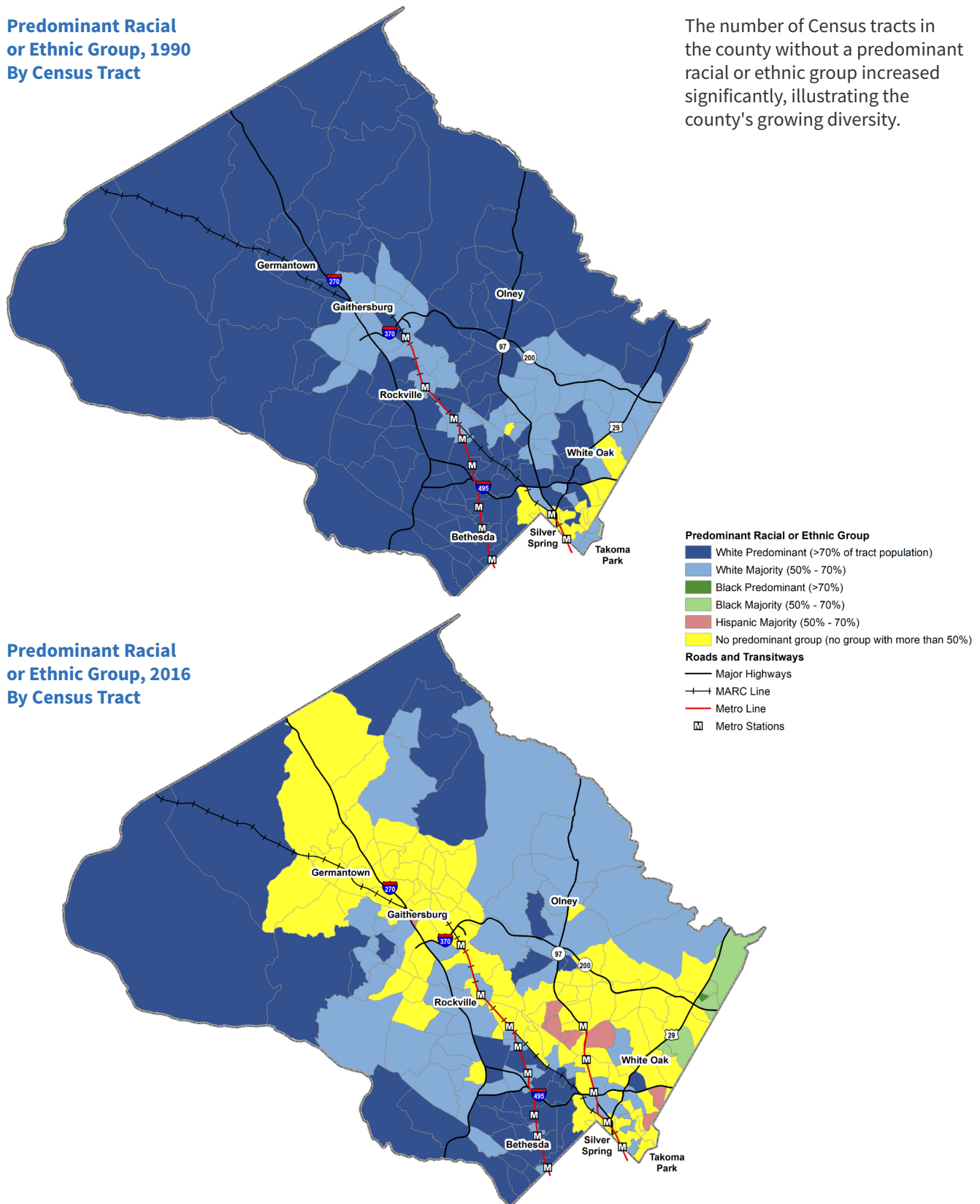


Sources: 1990-2000 Census, 2016 American Community Survey, 1-year estimates, 2012-2016 American Community Survey 5-year estimates, U.S. Census Bureau, and Age Forecast, Maryland Department of Planning (2017).

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**Predominant Racial or Ethnic Group, 1990
By Census Tract**

The number of Census tracts in the county without a predominant racial or ethnic group increased significantly, illustrating the county's growing diversity.

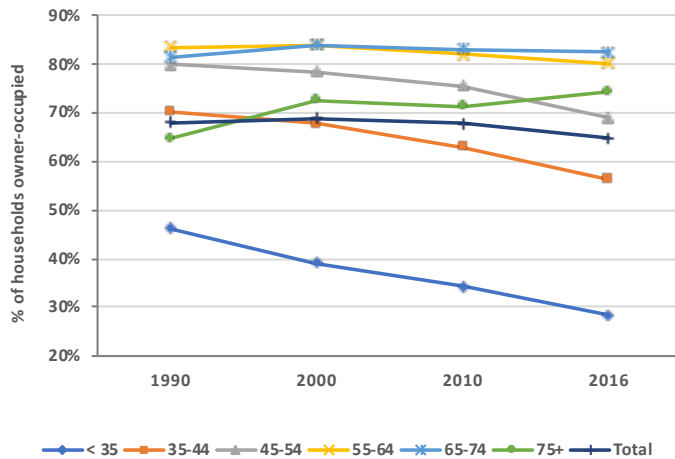


Sources: 1990 Census and 2012-2016 American Community Survey 5-year estimates, U.S. Census Bureau.

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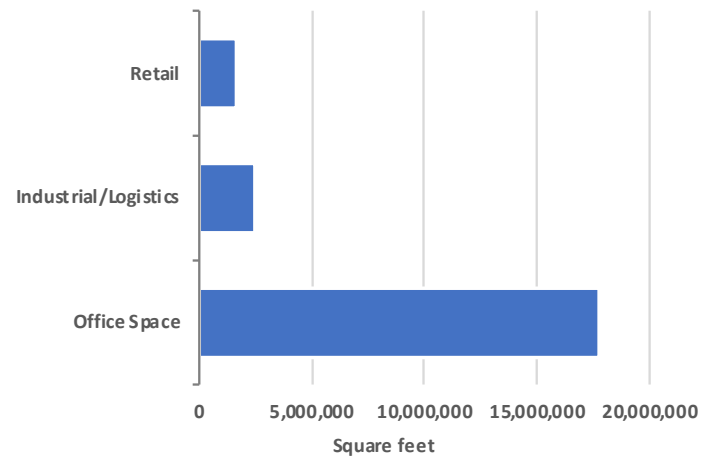
Homeownership declined across most age groups, with the greatest decline among households under age 35

Homeownership Rates by Age of Householder, 1990-2016



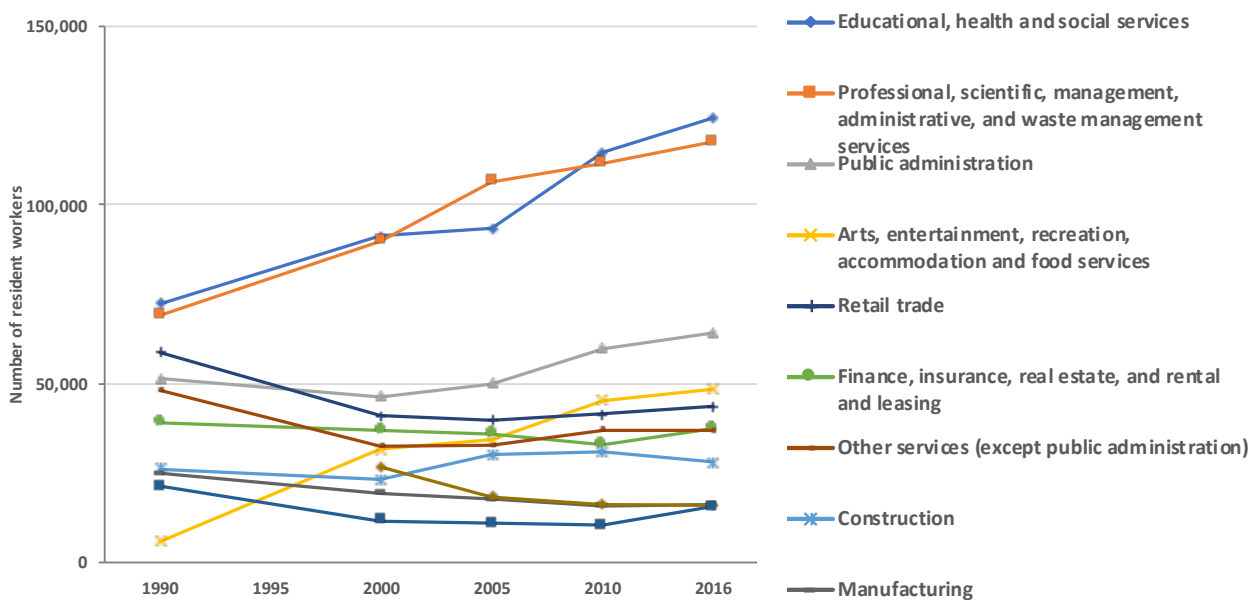
Office space grew the most since the 1990s

Commercial Space Growth, 1990-2017



Education, health, and social services are outpacing other industries in total resident employment

Resident Employment by Industry, 1990-2016



Sources: 1990-2010 Census, 2000-2016 American Community Survey, 1-year estimates, U.S. Census Bureau, and CoStar Analytics, 2018.

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For more information and analysis: Check out the Research & Special Projects Division website at www.mcfacts.org

The General Plan website: <https://montgomeryplanning.org/planning/master-plan-list/general-plans/planning-general-plan-update/>