

REGIONAL SNAPSHOT

February 2011

ARC's County and Small-Area Forecasts: What the Future Holds in the Atlanta Region

ARC forecasts that the Atlanta region will add some three million residents and 1.5 million jobs during the next 30 years. This *Regional Snapshot* provides new, detailed information on ARC's forecasts for county and small areas – indicating that five metro counties will double their population and 10 counties will experience a doubling of their job base by 2040.

Last year, ARC published its region-wide forecasts (which didn't include numbers at the county level and below) that showed continued population growth and, after a "lost decade," renewed job growth. They also showed that the composition of the region's population will be a lot different than it is today – we will be older and more diverse. And, due to a growing demand for Healthcare jobs, the region's job composition will look differently, as well. Visit www.atlantaregional.com/regionalsnapshots and search under "forecasts" to read more about ARC's regional forecasts.

As part of Plan 2040, ARC produces both regional and small-area forecasts to help guide the long-range planning process. (Visit www.atlantaregional.com/plan2040 to learn more).

ARC FORECASTS TWO COUNTIES WILL BE HOME TO MORE THAN ONE MILLION PEOPLE BY 2040

Of the three million more people expected in the region by 2040, nearly 800,000 of them will call either Fulton or Gwinnett home, accounting for 26 percent of the 20-county region's forecast population growth, which actually represents a decline from a 32 percent share today. Both counties will have more than one million people by 2040. Gwinnett is forecast to add almost 413,000 people, tops in the region. Next are Fulton (+373,000), Henry (+239,000) and Forsyth (+202,000). The City of Atlanta is forecast to add more than 250,000 people.

Table 1 – ARC Population Forecasts 2010-2040

County	1980 Population	2010 Estimated Population	2040 Forecast Population	1980-2010			2010-2040		
				Average Annual Change	Total Change	Percent Change	Average Annual Change	Total Change	Percent Change
Barrow	21,354	66,100	132,100	1,492	44,746	209.5%	2,200	66,000	99.8%
Bartow	40,760	94,600	169,900	1,795	53,840	132.1%	2,510	75,300	79.6%
Carroll	56,346	111,700	192,500	1,845	55,354	98.2%	2,693	80,800	72.3%
Cherokee	51,699	207,400	401,600	5,190	155,701	301.2%	6,473	194,200	93.6%
Clayton	150,357	281,100	321,800	4,358	130,743	87.0%	1,357	40,700	14.5%
Cobb	297,718	672,100	855,500	12,479	374,382	125.8%	6,113	183,400	27.3%
Coweta	39,268	120,100	248,900	2,694	80,832	205.8%	4,293	128,800	107.2%
DeKalb	483,024	738,800	930,700	8,526	255,776	53.0%	6,397	191,900	26.0%
Douglas	54,573	128,400	256,500	2,461	73,827	135.3%	4,270	128,100	99.8%
Fayette	29,043	106,000	168,500	2,565	76,957	265.0%	2,083	62,500	59.0%
Forsyth	27,958	176,800	378,400	4,961	148,842	532.4%	6,720	201,600	114.0%
Fulton	589,904	965,600	1,338,900	12,523	375,696	63.7%	12,443	373,300	38.7%
Gwinnett	166,815	758,000	1,170,600	19,706	591,185	354.4%	13,753	412,600	54.4%
Hall	75,649	178,500	346,100	3,428	102,851	136.0%	5,587	167,600	93.9%
Henry	36,309	193,500	432,600	5,240	157,191	432.9%	7,970	239,100	123.6%
Newton	34,666	97,100	200,400	2,081	62,434	180.1%	3,443	103,300	106.4%
Paulding	26,110	129,700	283,700	3,453	103,590	396.7%	5,133	154,000	118.7%
Rockdale	36,570	84,600	159,600	1,601	48,030	131.3%	2,500	75,000	88.7%
Spalding	47,899	65,800	114,000	597	17,901	37.4%	1,607	48,200	73.3%
Walton	31,211	78,500	154,100	1,576	47,289	151.5%	2,520	75,600	96.3%
City of Atlanta*	425,022	482,300	736,100	1,909	57,378	13.5%	8,460	253,800	52.6%
20-County Total	2,297,233	5,254,400	8,256,400	98,572	2,957,167	128.7%	100,067	3,002,000	57.1%

Source: ARC's Plan 2040 Forecasts

Note: City of Atlanta totals are included in Fulton and DeKalb totals.

ARC's County and Small-Area Forecasts: What the Future Holds in the Atlanta Region

Five counties will more than double their populations between now and 2040, and another five counties will see their populations almost double. Henry County will see the largest percentage increase (124 percent) between now and 2040. Next are Paulding (119 percent), Forsyth (114 percent), Coweta (107 percent) and Newton (106 percent).

Finally, the growth that ARC forecasts for the next 30 years is remarkably similar to the growth the region experienced between 1980 and 2010. While the overall numbers are similar, the *type* of growth over the next 30 years will look different than the growth of the previous 30 years. Metro Atlanta, and the nation as a whole, is getting older and more diverse.

Chart 1 shows the share of the region's total population in 2010 and in 2040. Today, Fulton, Gwinnett, DeKalb and Cobb account for 60 percent of the region's population. By 2040, that share will drop to 52 percent. Every other county, except Clayton, will see its share of the region's population increase by 2040.

FULTON TO HAVE MORE THAN ONE MILLION JOBS BY 2040

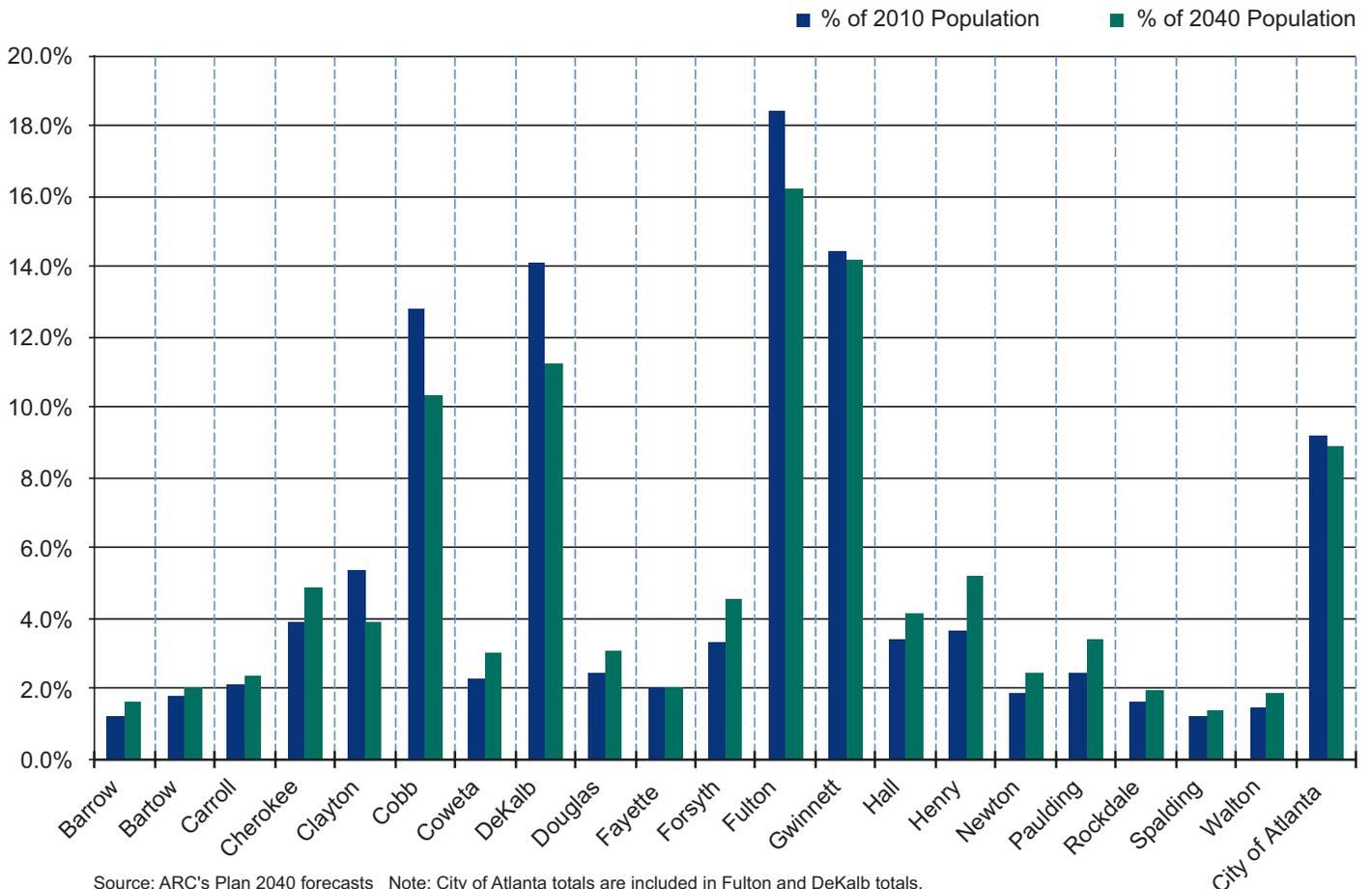
Fulton County is forecast to add more than 360,000 jobs over the next 30 years, tops in the region. This growth will give Fulton more than one million jobs, or roughly 28 percent of all jobs in the region.

Gwinnett will add 220,000 jobs, ranking second in forecast job growth. Next are Cobb (+154,000) and DeKalb (+135,000). The City of Atlanta will add more than 200,000 jobs.

In percentage terms, Cherokee will lead the region with a 166 percent increase in jobs over the next 30 years. Next are Henry (+141 percent), Barrow (+133 percent) and Forsyth (+124 percent). Note that 10 counties are expected to at least double their job base between now and 2040.

Similar to the trend noted in population, the "Big Four" counties of Fulton, Gwinnett, Cobb and DeKalb account for the vast majority of all jobs in the region today, almost 72 percent. By 2040, those four counties' share of the region's jobs will drop to 66 percent.

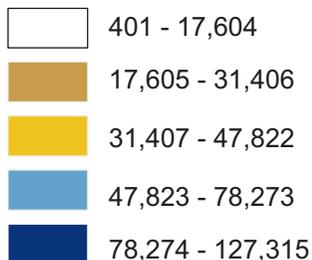
Chart 1 – Share of Region's Population 2010 and 2040



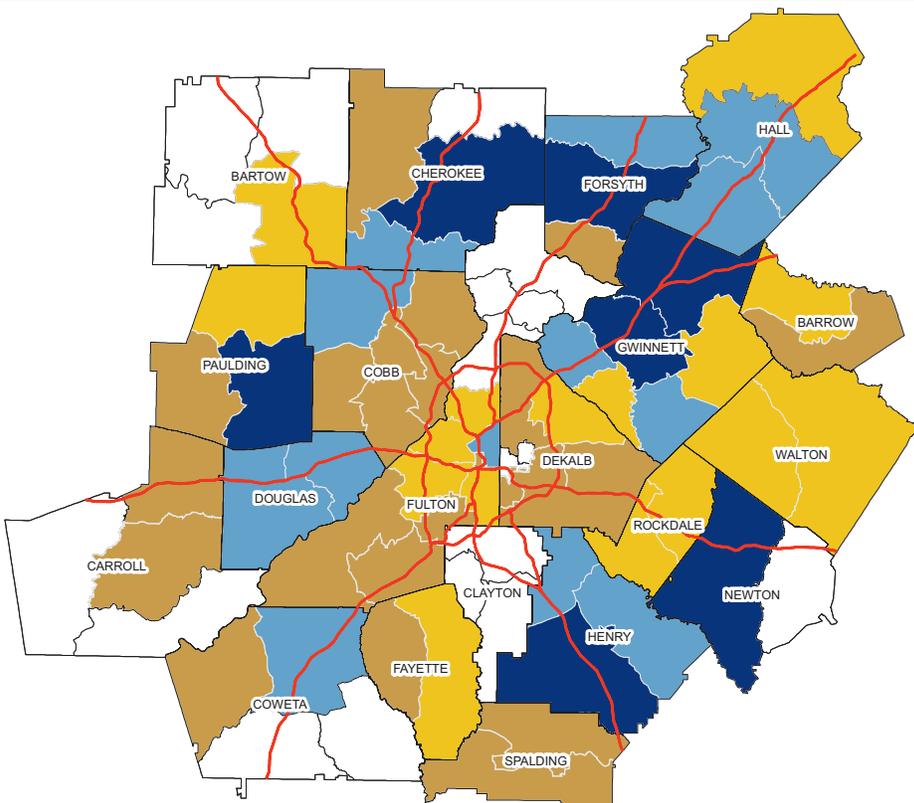
Source: ARC's Plan 2040 forecasts Note: City of Atlanta totals are included in Fulton and DeKalb totals.

Map 1 – Total Population Change, 2010-2040

ARC Forecasts Population Change

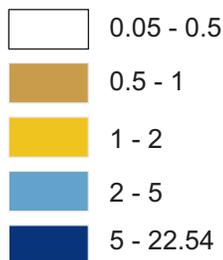


Map 1 shows forecast population change between 2010 and 2040 within the 20-county region by Superdistrict (which are ARC-defined sub-county areas that attempt, where possible, to mirror “market” areas). Both the region’s core and the suburban areas throughout the region are expected to capture significant growth - north (Cherokee and Forsyth), south (Henry), east (Gwinnett and Newton) and west (Paulding).

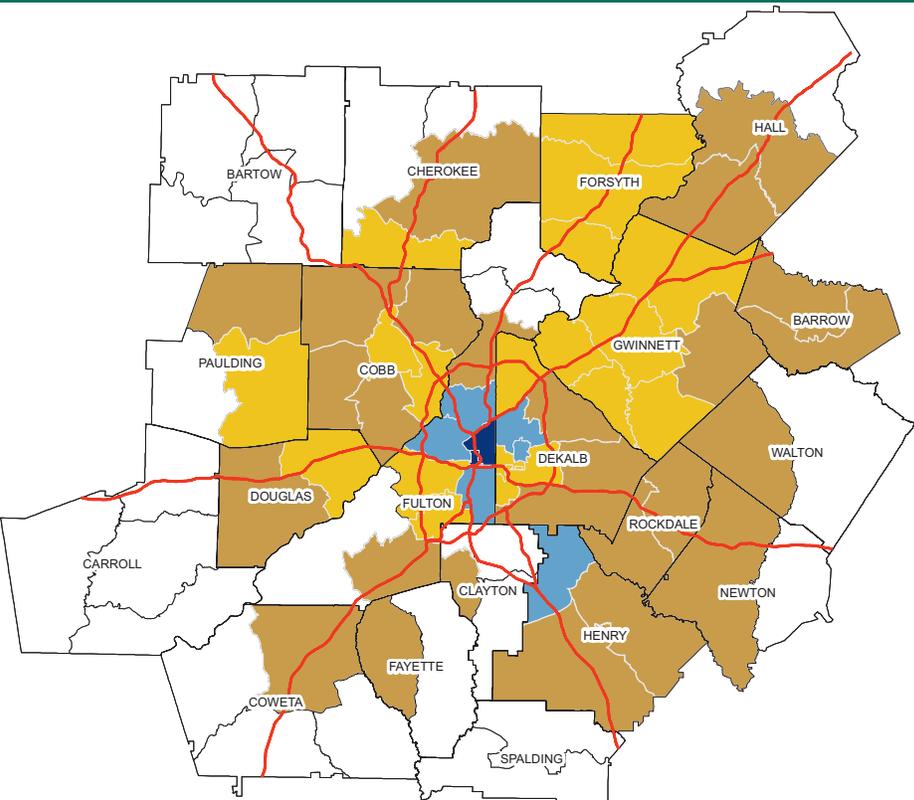


Map 2 – Persons Added Per Acre, 2010-2040

ARC Forecasts Population Change Per Acre



Map 2 also shows forecast population growth, but controls for the relative size of the Superdistrict by depicting the number of people added per acre, a measure of densification. The small-sized Superdistricts within the perimeter are poised to add the most people per acre, thus densifying the most.



ARC's County and Small-Area Forecasts: What the Future Holds in the Atlanta Region

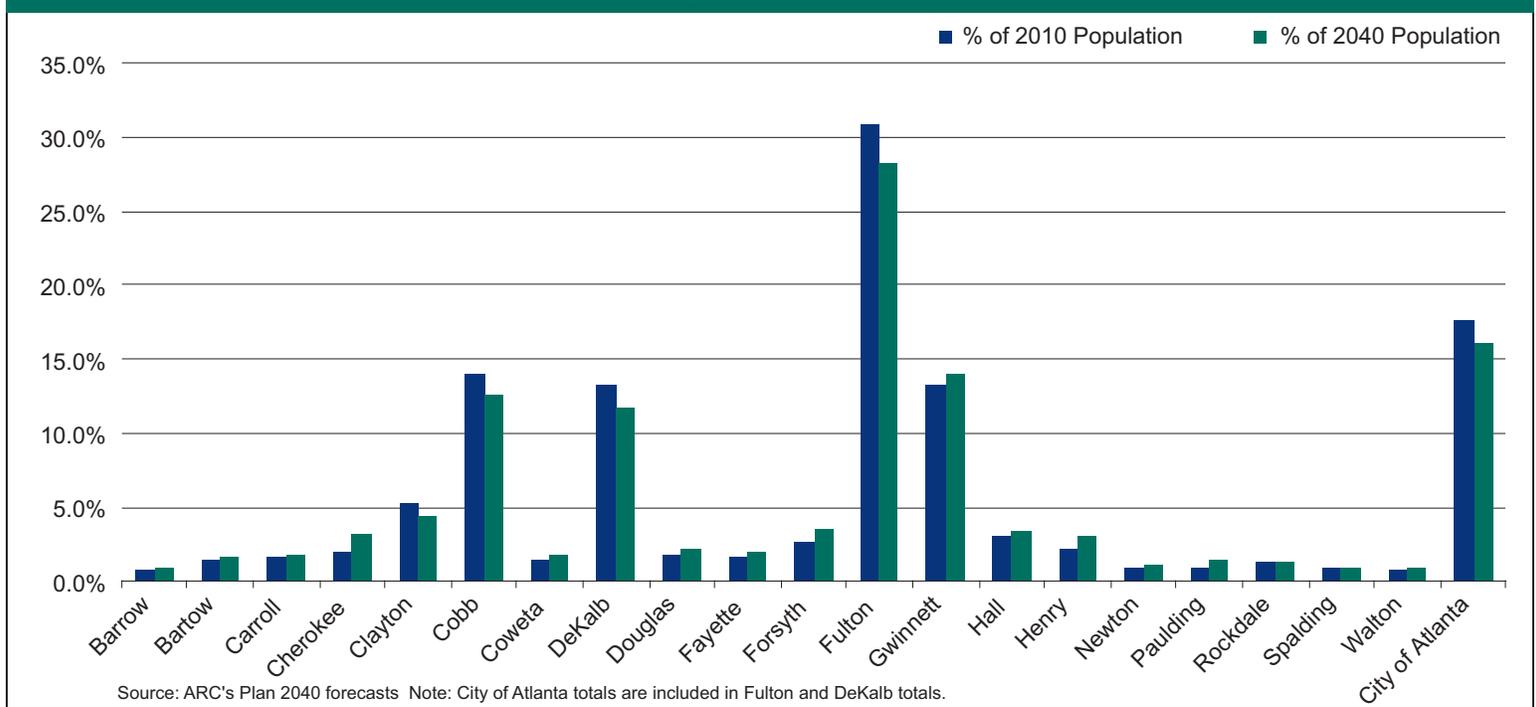
Table 2 – ARC's Employment Forecasts 2010-2040

County	2010 Estimated Employment	2040 Forecast Employment	Total Change	Percent Change
Barrow	14,600	34,000	19,400	132.9%
Bartow	29,900	62,200	32,300	108.0%
Carroll	35,900	67,000	31,100	86.6%
Cherokee	43,600	116,100	72,500	166.3%
Clayton	113,900	158,000	44,100	38.7%
Cobb	304,700	458,400	153,700	50.4%
Coweta	31,000	67,000	36,000	116.1%
DeKalb	289,700	425,100	135,400	46.7%
Douglas	37,600	75,400	37,800	100.5%
Fayette	35,900	73,000	37,100	103.3%
Forsyth	57,700	129,000	71,300	123.6%
Fulton	672,000	1,032,700	360,700	53.7%
Gwinnett	288,900	508,800	219,900	76.1%
Hall	66,300	124,900	58,600	88.4%
Henry	45,200	109,000	63,800	141.2%
Newton	19,600	39,000	19,400	99.0%
Paulding	20,400	51,100	30,700	150.5%
Rockdale	28,700	47,000	18,300	63.8%
Spalding	20,800	36,600	15,800	76.0%
Walton	17,300	37,000	19,700	113.9%
City of Atlanta*	383,600	585,000	201,400	52.5%
20-County Total	2,173,700	3,651,300	1,477,600	68.0%

Source: ARC's Plan 2040 forecasts

Note: City of Atlanta totals are included in Fulton and DeKalb totals.

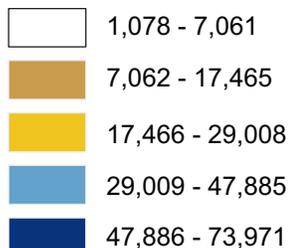
Chart 2 – Share of Region's Employment: 2010 and 2040



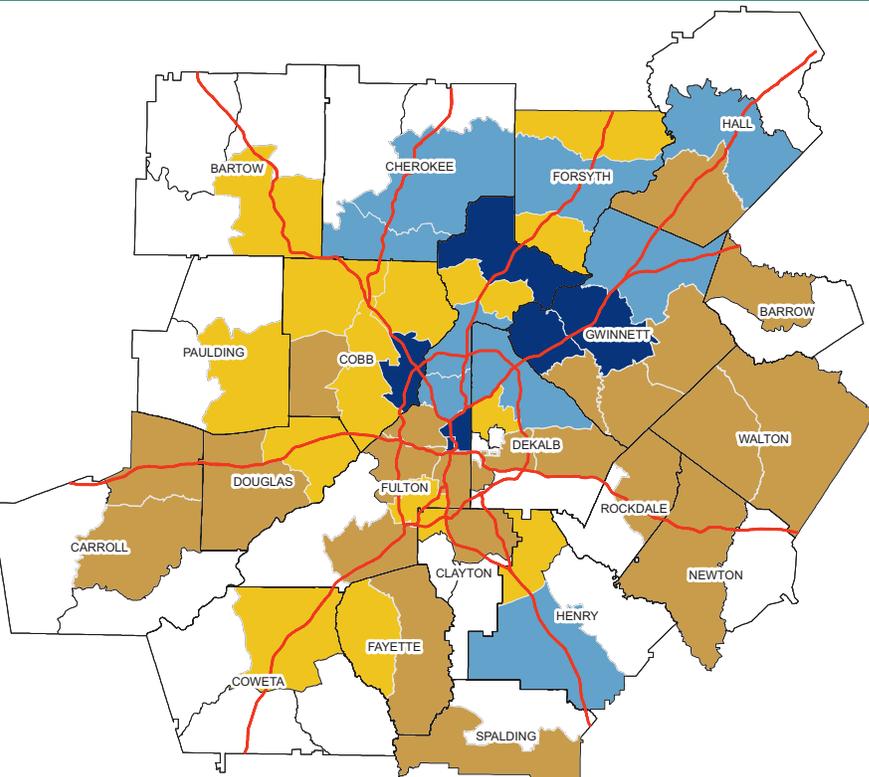
Source: ARC's Plan 2040 forecasts Note: City of Atlanta totals are included in Fulton and DeKalb totals.

Map 3 – Employment Change, 2010-2040

ARC Forecasts Employment Change

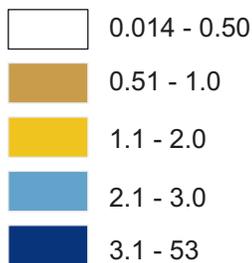


Map 3 shows forecast employment change between 2010 and 2040 within the 20-county region by Superdistrict. Over the past few decades, new employment centers have emerged northward along I-85 and the GA 400 corridor. ARC forecasts this general job expansion northward to continue, although the traditional employment centers around downtown Atlanta and Midtown will also add significant numbers of jobs over the next 30 years.

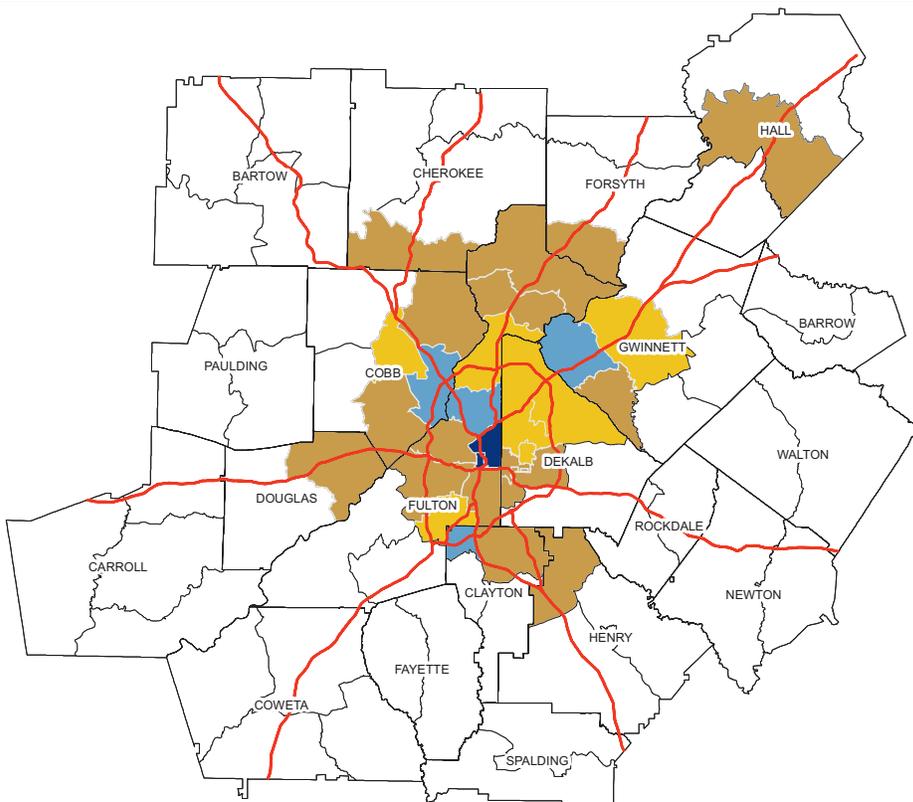


Map 4 – Employment Change Per Acre, 2010-2040

ARC Forecasts Jobs Added Per Acre



Map 4 also shows forecast employment growth, but again controls for the relative size of the Superdistrict by displaying the number of jobs added per acre. It shows that the region's traditional job centers will continue to densify and that, in general, employment will remain concentrated in and around the region's core. The recently-emergent employment centers of north Fulton, south Forsyth and western Gwinnett will also continue to densify, but generally not at the scale of the more traditional job centers.



ARC's County and Small-Area Forecasts: What the Future Holds in the Atlanta Region

MORE THAN 300,000 JOBS TO BE ADDED IN HIGH-PAYING SECTORS

ARC forecasts that more than 300,000 jobs in the five highest-paying sectors – Professional/Scientific/Technical, Information, Finance, Wholesale Trade and Management of Companies – will be added over the next 30 years. Please note, however, that on average, these

are the highest-paying sectors *today*. They might not be the highest-paying sectors by 2040. Healthcare jobs, for example, will be in high demand over the next 30 years. This demand could, in theory, push wages up across this sector.

Fulton will continue to have the highest share of jobs in these five sectors, followed by Gwinnett, Cobb and DeKalb, which is exactly the same order as today.

Table 3 – Job Quality, 2010 and 2040

County	2010			2040		
	Total Employment	Jobs in Five Highest-Paying Sectors	Percent of Jobs in Highest-Paying Sectors	Total Employment	Jobs in Five Highest-Paying Sectors	Percent of Jobs in Highest-Paying Sectors
Barrow	14,600	1,700	11.6%	34,000	5,500	16.2%
Bartow	29,900	3,300	11.0%	62,200	8,300	13.3%
Carroll	35,900	3,800	10.6%	67,000	8,800	13.1%
Cherokee	43,600	5,600	12.8%	116,100	21,800	18.8%
Clayton	113,900	9,600	8.4%	158,000	12,100	7.7%
Cobb	304,700	76,700	25.2%	458,400	110,000	24.0%
Coweta	31,000	2,800	9.0%	67,000	8,600	12.8%
DeKalb	289,700	61,700	21.3%	425,100	88,100	20.7%
Douglas	37,600	3,500	9.3%	75,400	8,600	11.4%
Fayette	35,900	5,500	15.3%	73,000	13,900	19.0%
Forsyth	57,700	12,400	21.5%	129,000	29,700	23.0%
Fulton	672,000	208,400	31.0%	1,032,700	306,400	29.7%
Gwinnett	288,900	76,600	26.5%	508,800	135,300	26.6%
Hall	66,300	8,000	12.1%	124,900	18,600	14.9%
Henry	45,200	5,100	11.3%	109,000	13,000	11.9%
Newton	19,600	1,700	8.7%	39,000	5,100	13.1%
Paulding	20,400	1,500	7.4%	51,100	6,100	11.9%
Rockdale	28,700	3,700	12.9%	47,000	6,700	14.3%
Spalding	20,800	1,800	8.7%	36,600	3,600	9.8%
Walton	17,300	1,700	9.8%	37,000	5,000	13.5%
City of Atlanta*	383,600	104,400	27.2%	585,000	153,200	26.2%
20-County Total	2,173,700	495,100	22.8%	3,651,300	815,200	22.3%

Source: ARC's Plan 2040 forecasts

Note: The five highest-paying sectors today in metro Atlanta region are Professional/Scientific/Technical (Avg monthly wage: \$6,900), Information (\$6,600), Finance (\$6,300), Wholesale Trade (\$6,200) and Management of Companies (\$6,200). These may not be the highest-paying sectors in 2040.

Wage information from QWI program of the U.S. Census Bureau.

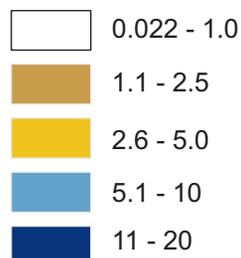
Note: City of Atlanta totals are included in Fulton and DeKalb totals.

Learn More About ARC's Forecasts

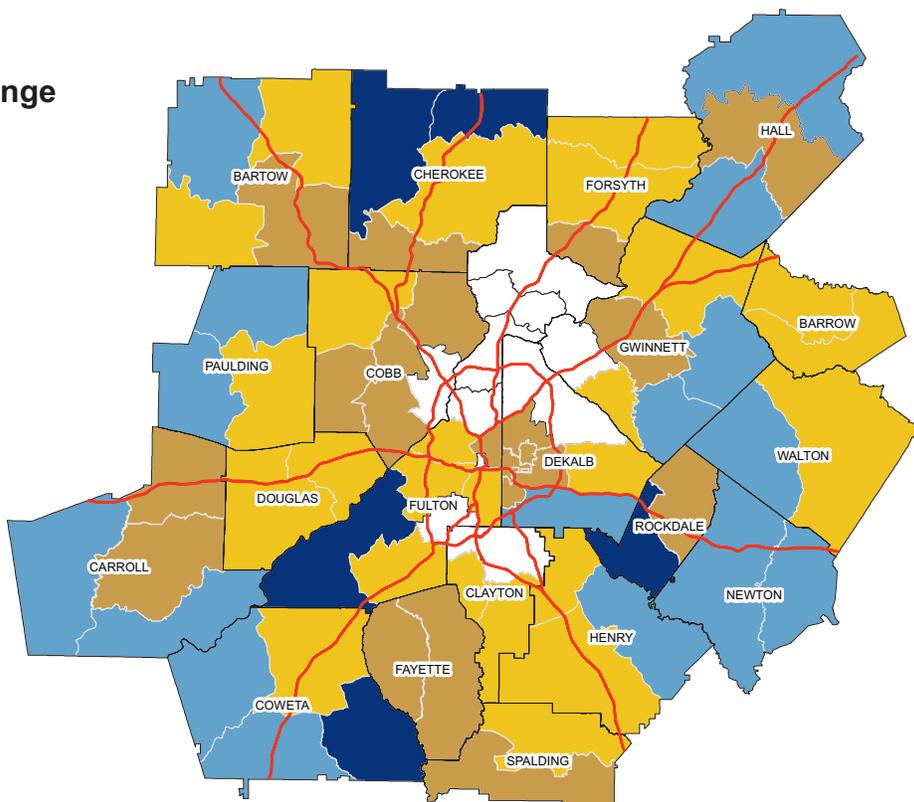
ARC has a wealth of information at www.atlantaregional.com/forecasts. Here you can read more about ARC's regional forecasts, how we did them and how we disaggregated the results to small areas. ARC also developed different scenarios to assess the impact that different land use patterns can have on the transportation infrastructure we expect to have in 2040. More information will be posted in the coming months, so be sure to check back.

Map 5 – Ratio of Population Change to Employment Change

ARC Forecasts Population Change/Employment Change

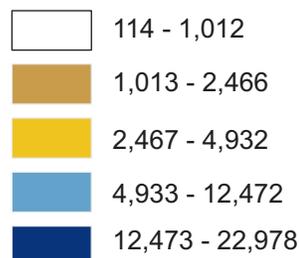


Map 5 shows the ratio of forecast population change to the forecast employment change. The areas in white are those that are expected to add more jobs than people over the next 30 years. These areas are job-rich today, and are forecast to be job-rich in 2040. The areas in blue are expected to add the most people in relation to jobs over the next 30 years. These areas are forecast to become more “housing-rich” – i.e. they are residential in nature, without a substantial job base.

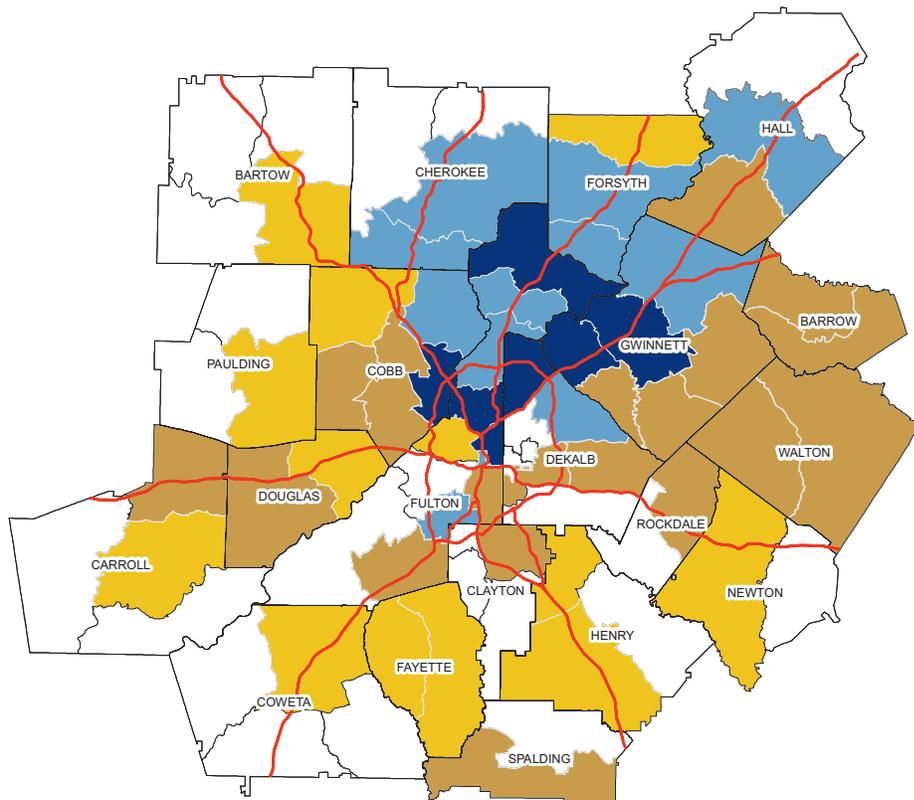


Map 6 – Employment Change in Five Highest-Paying Sectors, 2010-2040

ARC Forecasts Five-Highest Pay Sectors

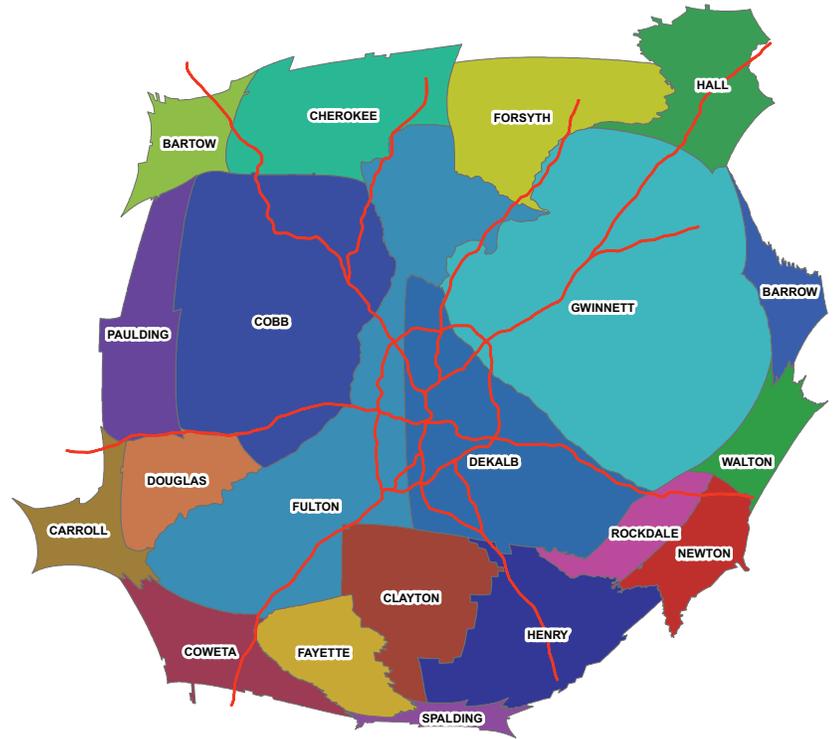


Map 6 shows forecast job growth in the five highest-paying sectors between 2010 and 2040. Please note, again, that although these are the five highest-paying sectors today, that may not be the case in 2040. Generally, the highest-paying jobs today are located north of the region’s core, following GA 400 northward. ARC forecasts this basic trend to continue, but with these high-paying jobs (in today’s wages) spreading more into Cherokee and Forsyth.



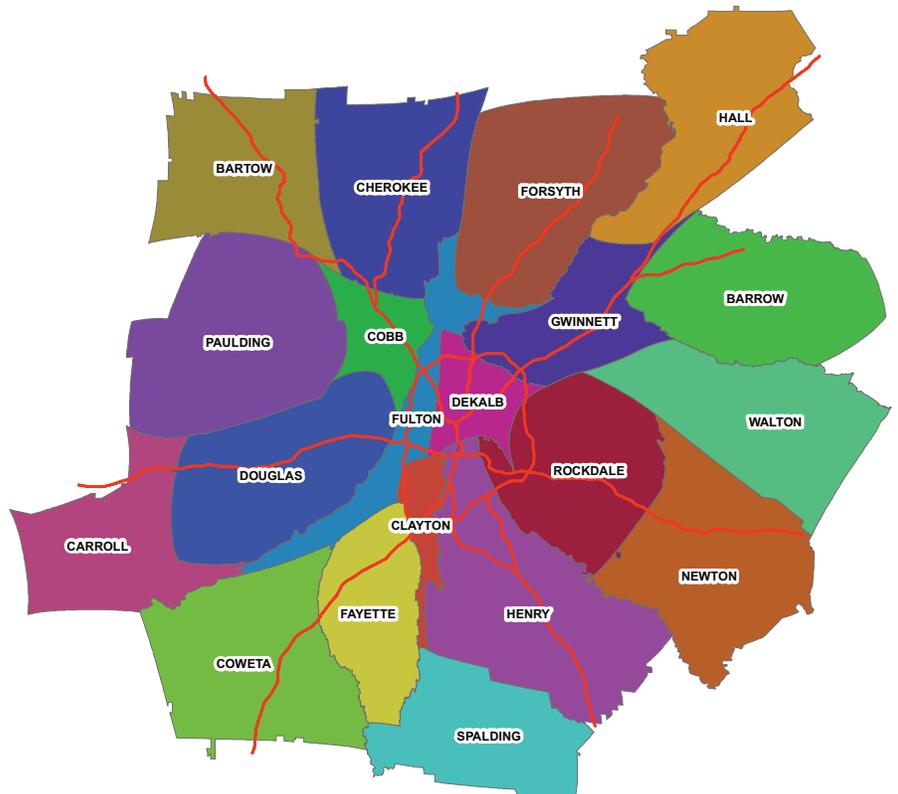
Cartogram 1– Total Change in Population, 2010-2040

This map depicts population change in a different way. It substitutes total population change between 2010 and 2040 for the land area of each county. Thus, the effect shows that those counties that are forecast to add the most population become the “biggest”. The “Big Four” counties of Cobb, DeKalb, Fulton and Gwinnett crowd out the rest of the region. Cherokee, Henry and Forsyth however, are also “big.”



Cartogram 2– Percent Change in Population, 2010-2040

This cartogram map depicts population growth in a different way – by percent population change between 2010 and 2040. Cartogram 2 substitutes percent population change for land area, however the result is a different picture than seen in Cartogram 1. Here, five suburban counties (Coweta, Forsyth, Henry, Paulding and Newton) are expected to double their population over the next 30 years. They crowd the “Big Four” counties, which are already big today, and, thus, do not experience as large of a percentage change.



For more information on these issues or to suggest new subjects, please email mcarnathan@atlantaregional.com.

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