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REGION

**ARC**  
Atlanta Regional Commission

# Gazing The Crystal Ball

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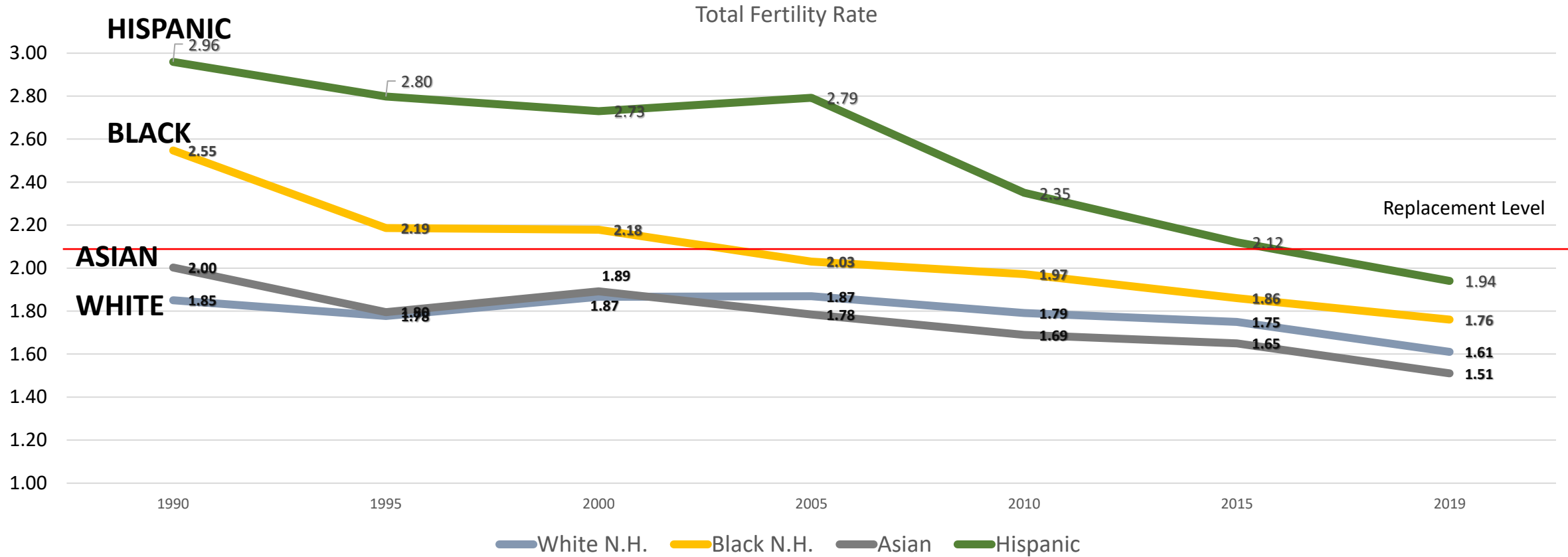
# In Summary...

- Diversity will drive the region's growth. Virtually all the net growth will come from racial and ethnic minority groups. For example, Hispanic and Latino residents are forecast to account for 21% of the region's population in 2050, compared to 12% today
- The region's population of older adults will grow at fast rate: In 2050, nearly 12% of the region's population, more than 900,000 people, will be aged 75 or older. That compares to a share of less than 5% today.
- Growth to remain strong, but slower than previously forecast. The new 2050 population forecast is about 700,000 below what was forecast in the previous series adopted in 2020. Driving the slower growth are declining fertility rates and a drop in "in-migration" – that is, people moving to metro Atlanta from other parts of the country or from abroad. Both of these trends accelerated during the Covid-19 pandemic.
- Fastest growth to occur in outer counties. The fastest-growing counties in the 21-county region through 2050 are forecast to be Forsyth (79%), Barrow (71%), Paulding (60%), Cherokee (53%), Walton (51%), and Coweta (51%).
- Strong growth in region's core, too: The region's five core counties (Fulton, Gwinnett, Cobb, DeKalb, and Clayton, are forecast to add a total of 812,000 people by 2050, representing nearly half of the region's total growth. And the areas inside the I-285 will "densify" the most.
- Employment in the Professional, Business and Technical Services sector will pace job growth in the region.



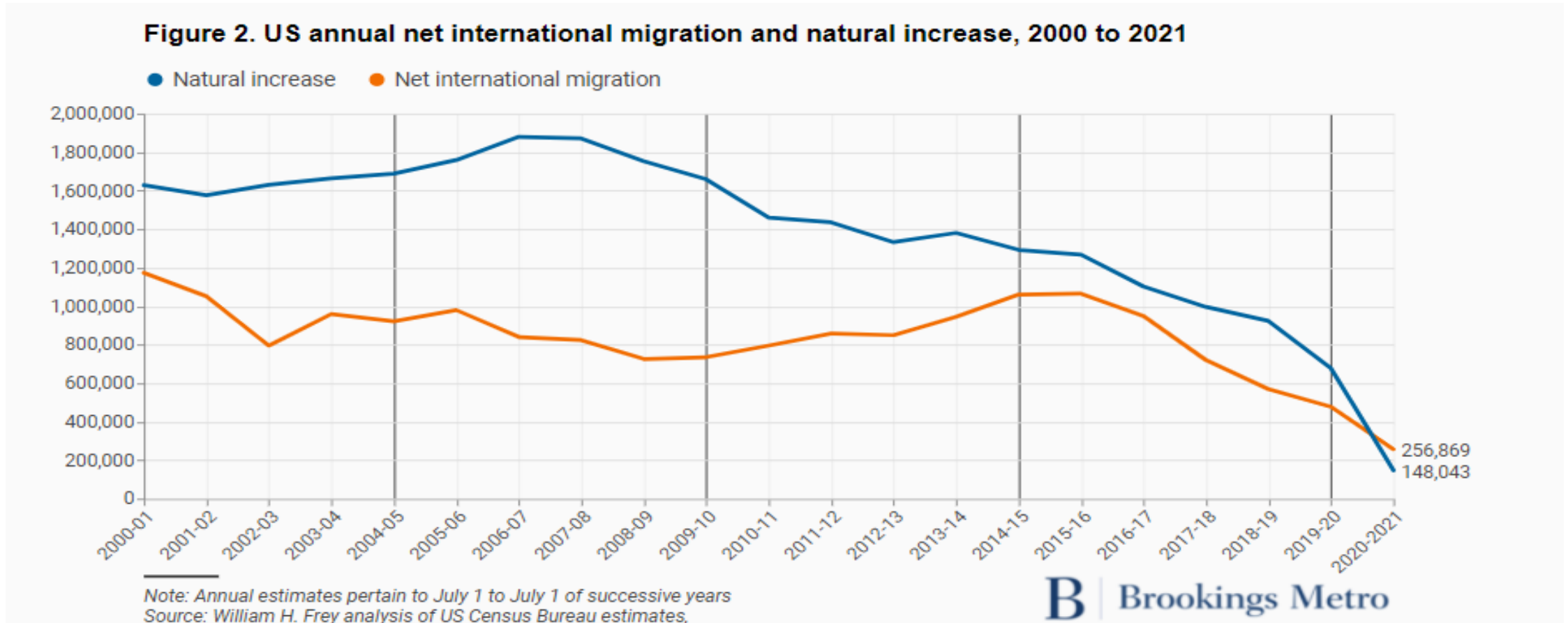
# First, Let's Look At Some National Factors Affecting Population Growth

# Fertility Rates Dropping Across All Races/Ethnicities



Population in a nation grows in two ways: Natural increase (births less deaths) and international in-migration. For the former, we see that regardless of race or ethnicity, the fertility rate has dropped below replacement level (approximately 2.1 children per woman). This trend will obviously have huge ramifications on how population grows here in the Atlanta region over the next 30 years or so. **Key takeaway: We won't be growing that much via natural increase in the future.**

# In-Migration Also Slowing



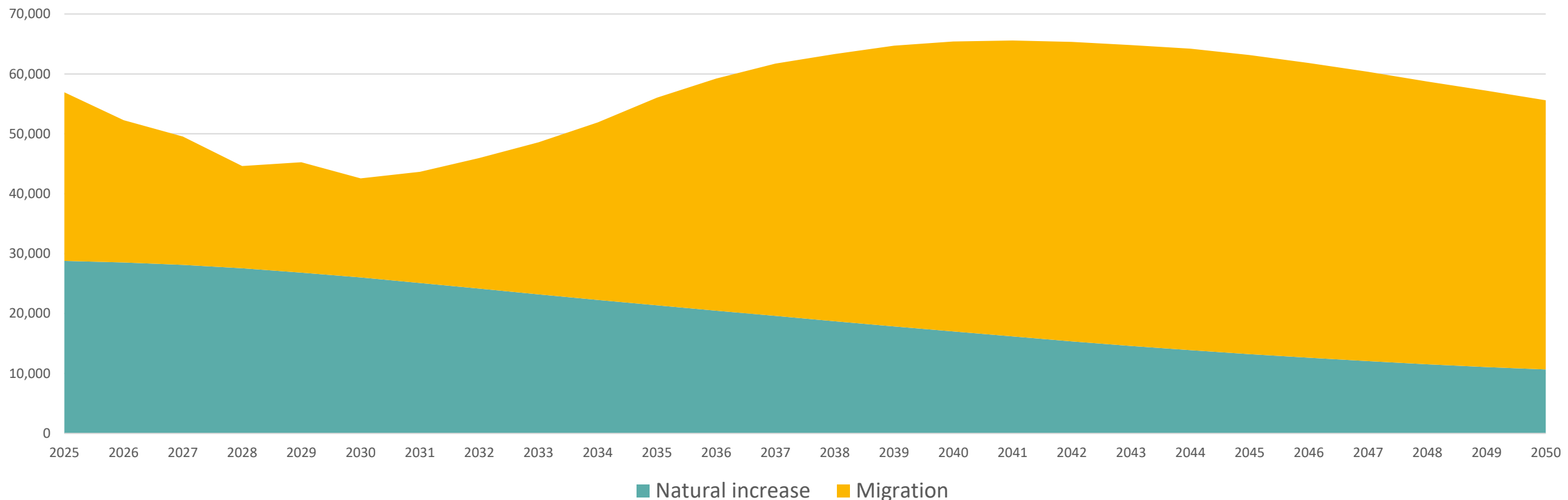
This graphic from Brookings shows that, in addition to natural increase slowing in the nation, net international migration is also slowing down. This means that there is slowing across *both components* of the population growth equation, and as such population growth *overall* is slowing. These trends are reflected in our latest forecasts. **Key takeaway: The pool of potential in-migrants is growing shallower with the dramatic decrease in international migration.**



# ARC's Series 17 Forecasts: *Population*

# Components of Growth: Natural Increase vs. In-Migration

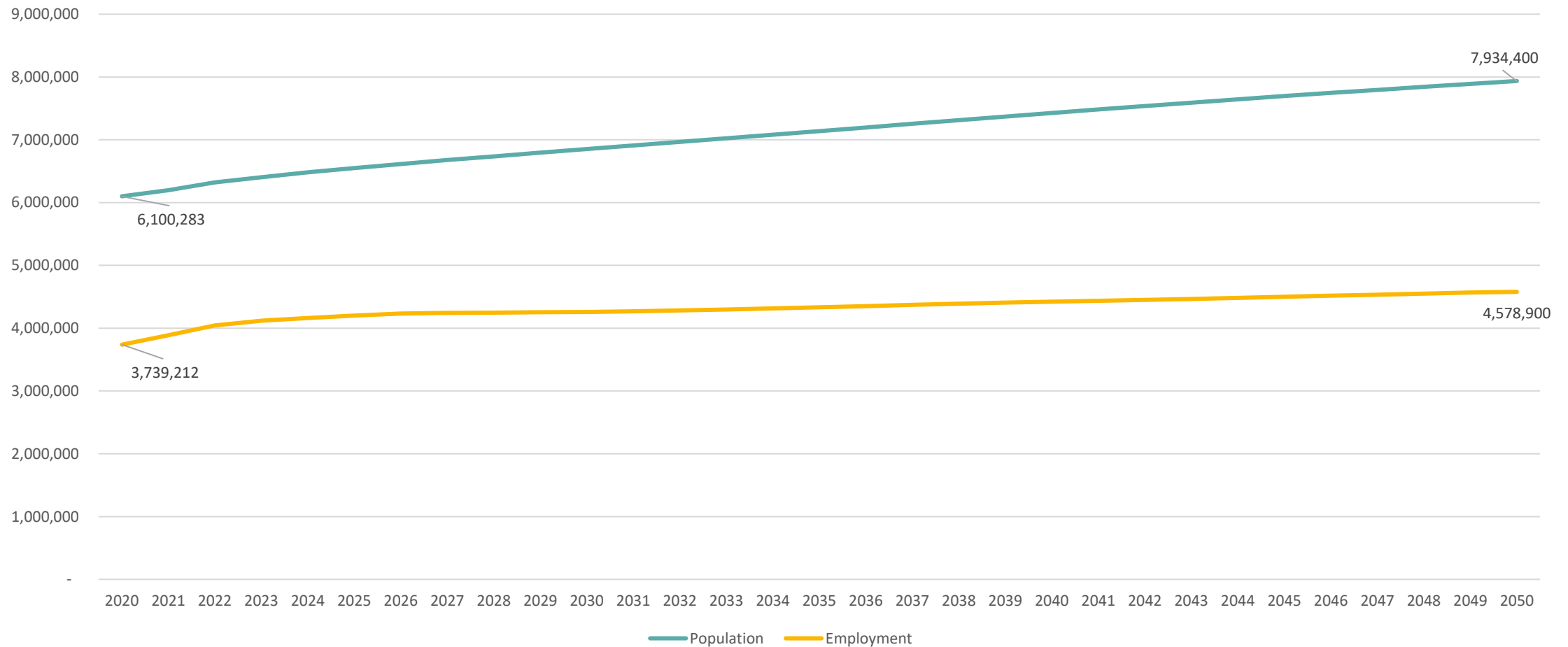
Ratio of In-Migration to Natural Increase in Series 17 Forecasts



As this chart shows, in-migration (domestic and international) will become an increasingly larger component of overall population growth throughout the forecast horizon. In 2025, the ratio between in-migration and natural increase is essentially 50/50. By 2050, that ratio will be 80/20, i.e., 80 percent of our growth will come from in-migration. Note: Because our forecasting model, REMI, seeks equilibrium, it produces some dramatic shifts in the first couple of years to account for the pandemic recovery. Thus, for this chart, we start the time series in 2025. **Key takeaway: With overall population growth slowing, we will need to rely concurrently on growing talent natively, retaining that local talent, and recruiting the right talent from a dwindling pool of potential in-migrants.**

# ARC Regional (21-County) Forecasts

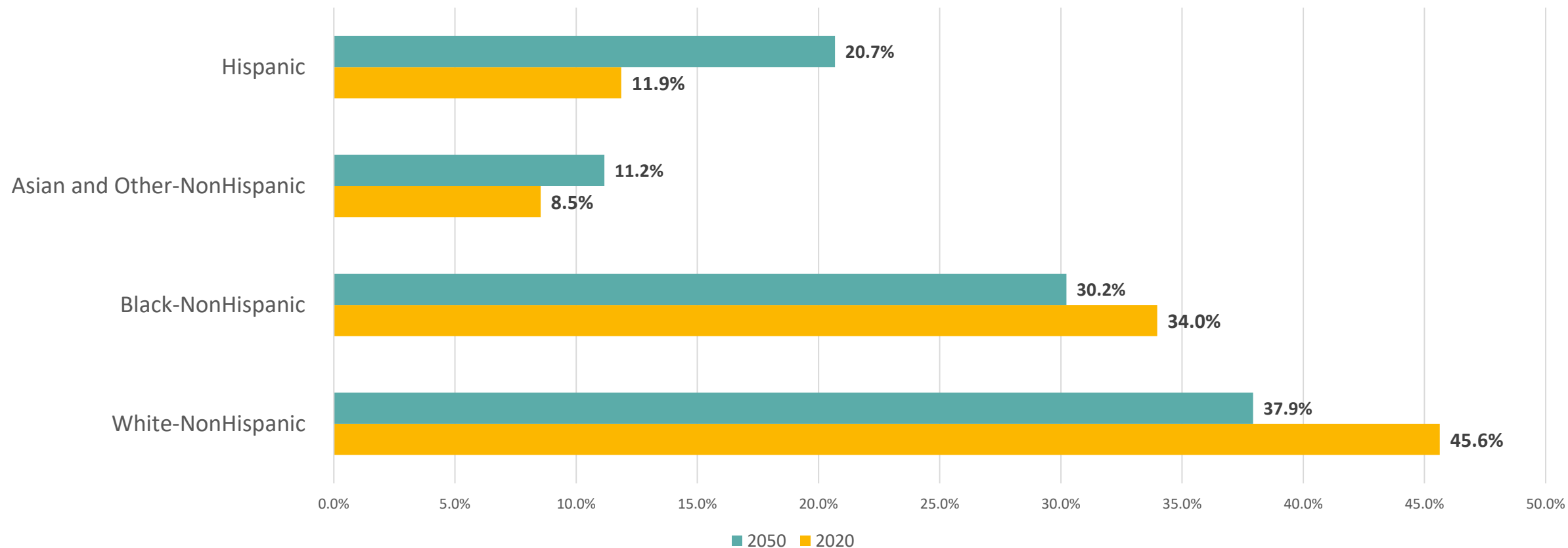
ARC's Series 17 Population and Employment Forecasts



As this chart shows, our latest forecast is for the 21-county region to add (from a 2020 base) roughly 1.8 million new residents and 860,000 new jobs by 2050. As the next slide shows, the forecast population growth in this series represents a slowdown when compared to growth expectations of prior series.

# Composition of Future Growth Changing Too

Share of Race and Ethnicity in 2020 and 2050: 21-County Region

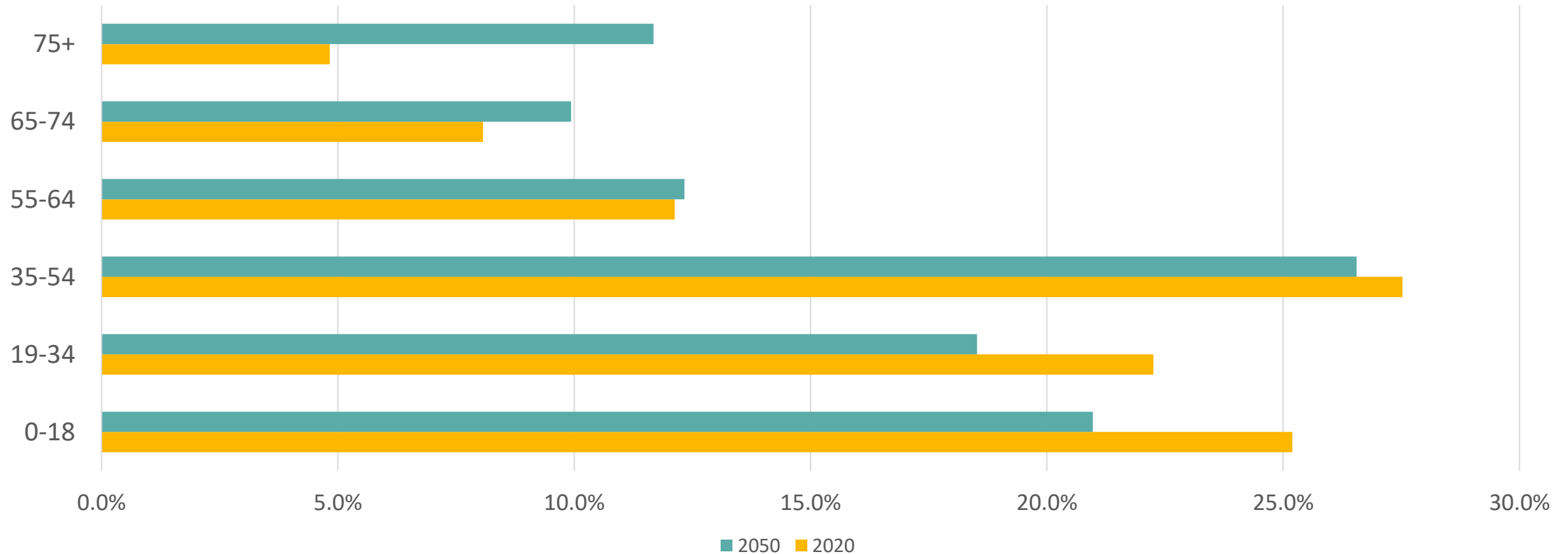


We are forecasting that the White and Black populations' shares of the total (population) will decline through to 2050, with concomitant share increases in the Hispanic ethnicity (of any race) and of "Asian and Other Non-Hispanic" races.

**Key takeaway: The Atlanta region's future population growth will be driven almost entirely by populations of color.**

# Oh, And We're Getting Older

Age Bands: 2020 and 2050



In looking at age, here we see that the only age bands that will grow *in share* over the forecast horizon are the 55 and over age cohorts, particularly the 75+ (with a dramatic increase from just under 5% to over 10%). Declining fertility rates are a significant driver for this trend.

**Key takeaway: We're going to have more than 900,000 people aged 75 and older in 2050. We have never had that kind of age profile in our history. Think of the ramifications-- for how we travel, how our communities are designed and how we will consume health care, among others.**



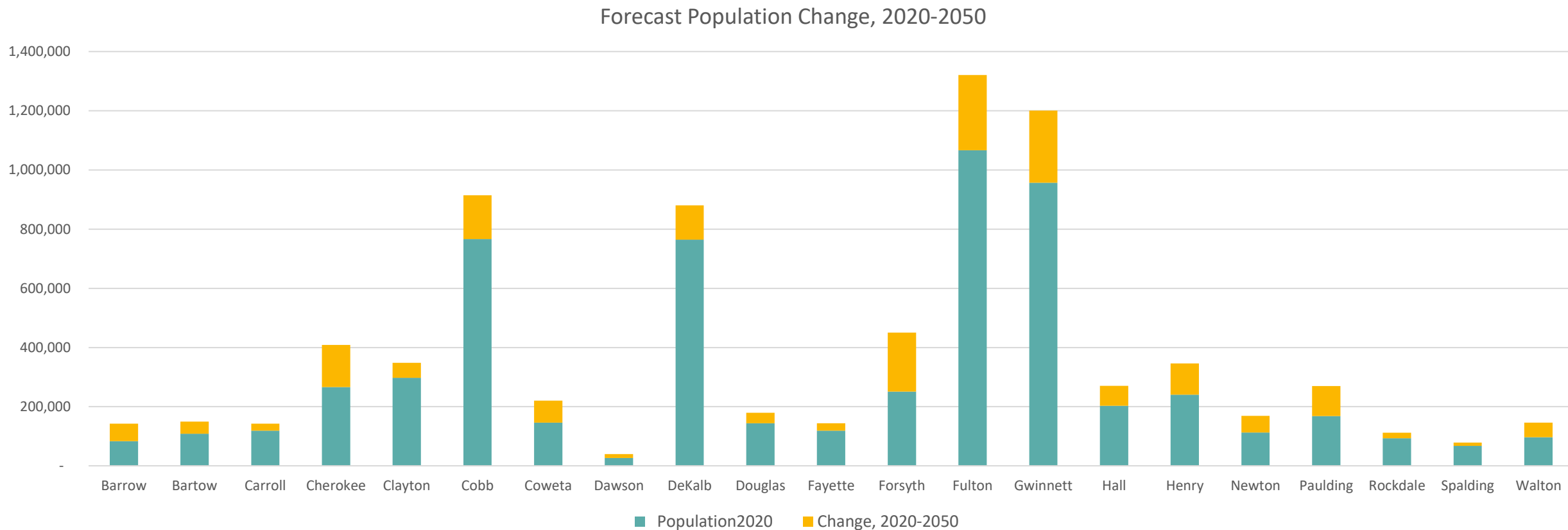
# ARC's Series 17 Forecasts: *County Population Trends*

# Forecast Population Growth By County: Just the Numbers

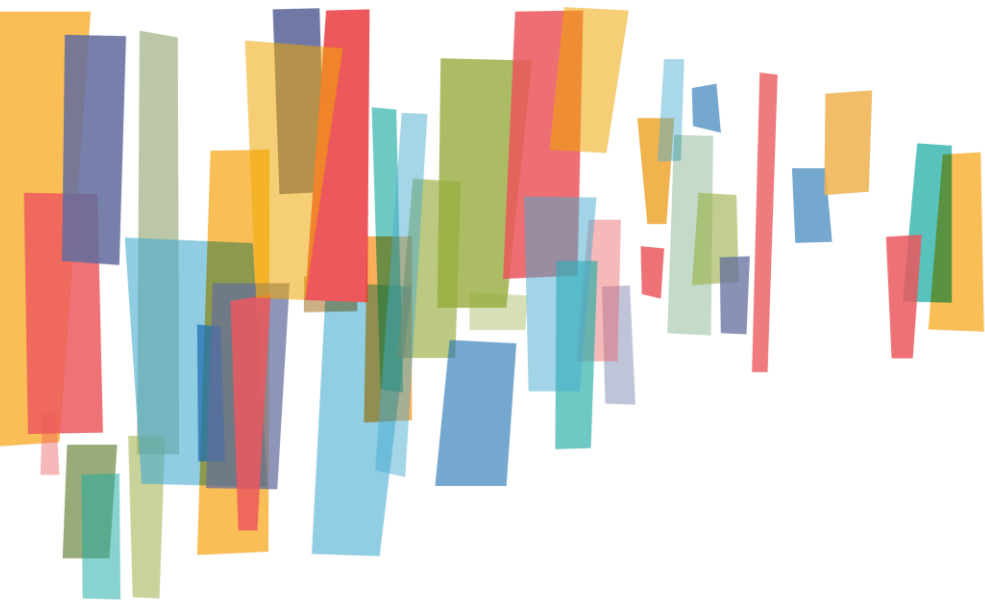
	Population 2020	Population 2050	Change, 2020-2050	Avg Annual % Change
Barrow	83,505	142,904	59,399	2.4%
Bartow	108,901	149,854	40,953	1.3%
Carroll	119,148	142,613	23,465	0.7%
Cherokee	266,620	408,837	142,217	1.8%
Clayton	297,595	348,006	50,411	0.6%
Cobb	766,149	914,448	148,299	0.6%
Coweta	146,158	220,225	74,067	1.7%
Dawson	26,798	39,758	12,960	1.6%
DeKalb	764,382	880,195	115,813	0.5%
Douglas	144,237	179,227	34,990	0.8%
Fayette	119,194	143,785	24,591	0.7%
Forsyth	251,283	450,124	198,841	2.6%
Fulton	1,066,710	1,321,079	254,369	0.8%
Gwinnett	957,062	1,200,534	243,472	0.8%
Hall	203,136	270,132	66,996	1.1%
Henry	240,712	346,392	105,680	1.5%
Newton	112,483	169,013	56,530	1.7%
Paulding	168,661	270,096	101,435	2.0%
Rockdale	93,570	112,397	18,827	0.7%
Spalding	67,306	78,826	11,520	0.6%
Walton	96,673	145,977	49,304	1.7%
<b>Grand Total</b>	<b>6,100,283</b>	<b>7,934,422</b>	<b>1,834,139</b>	<b>1.0%</b>

Fulton will remain the largest county in the region in 2050. In terms of average annual percent change, outer counties (which start from a lower base) like Barrow and Forsyth will experience the greatest percentage changes on an annual basis.

# Forecast Population Growth By County

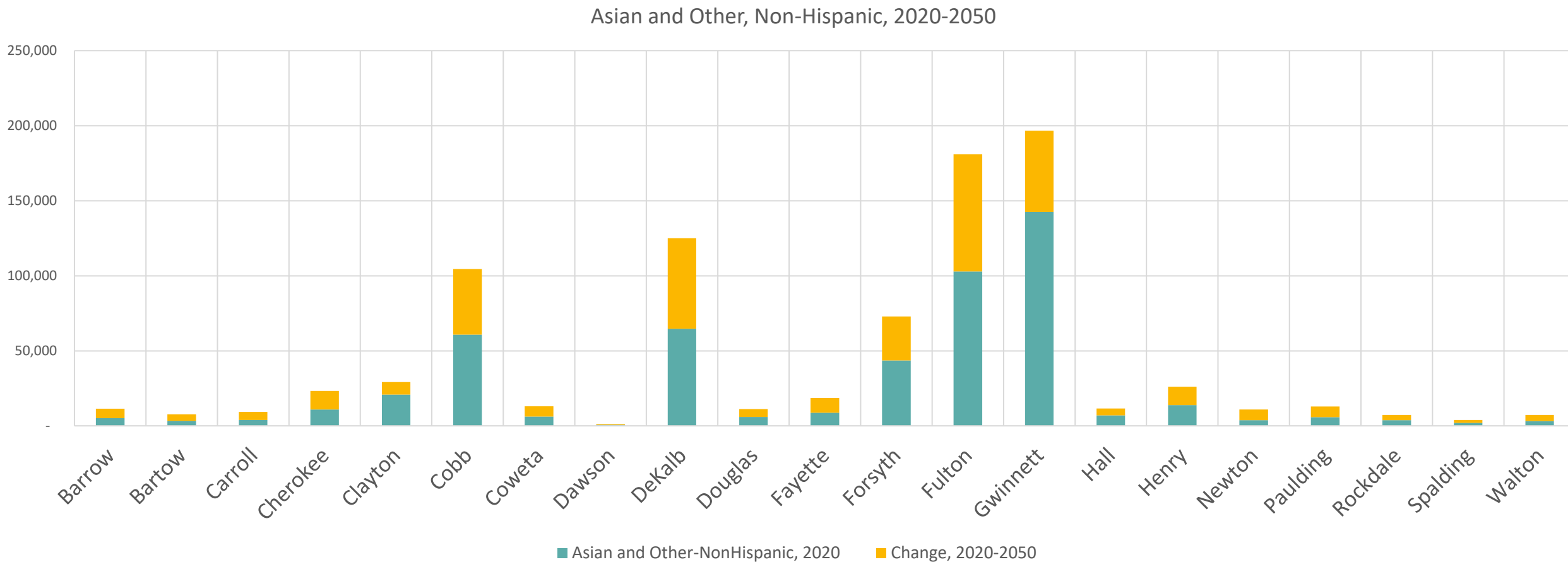


The orange sections on top of the bars represent change from 2020-2050. Every jurisdiction will experience some level of growth over the horizon.



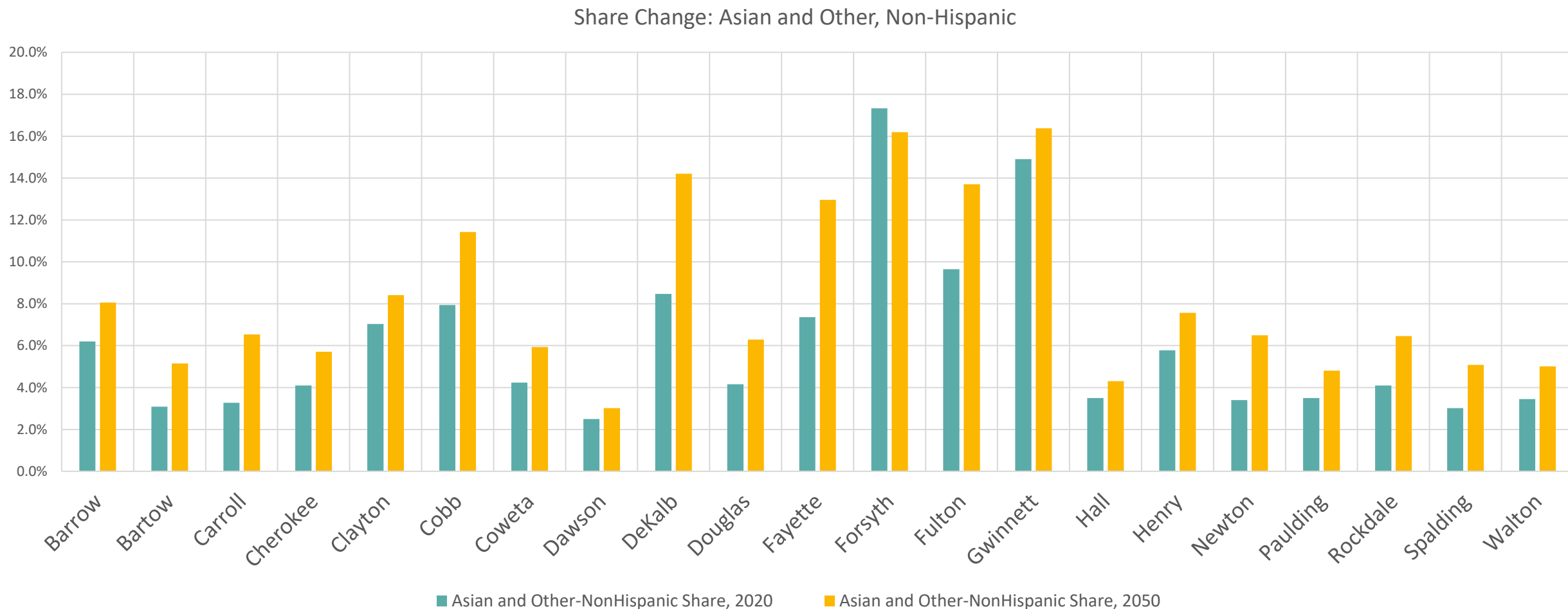
# ARC's Series 17 Forecasts: *County Race and Ethnicity Trends*

# Change By Race/Ethnicity: Asian and Other, Non-Hispanic



Every jurisdiction is forecast to add "Asian and Other Non-Hispanic" populations during the forecast horizon. Fulton will add the most, followed by DeKalb and Gwinnett, then Cobb and Forsyth.

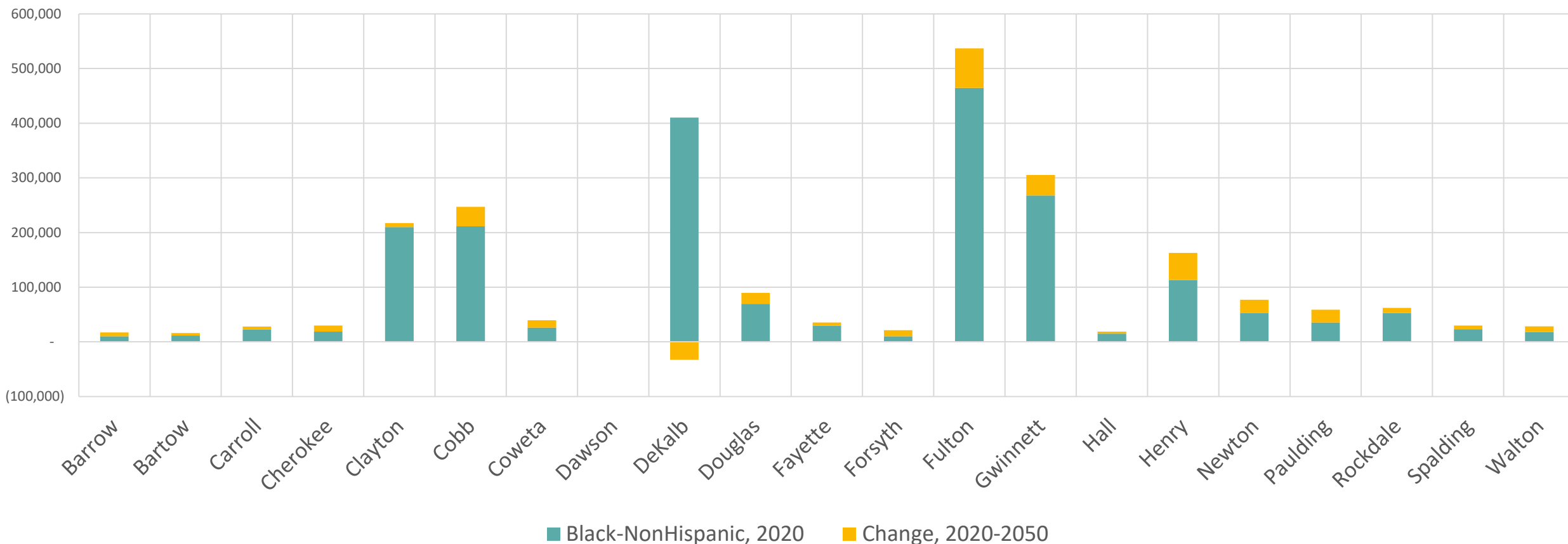
# Change in Share By Race/Ethnicity: Asian and Other, Non-Hispanic



Similarly, every jurisdiction except Forsyth (which already has, by far, the largest concentrations of Asian and Other, Non-Hispanic populations) will see a share increase in Asian and Other, Non-Hispanic populations.

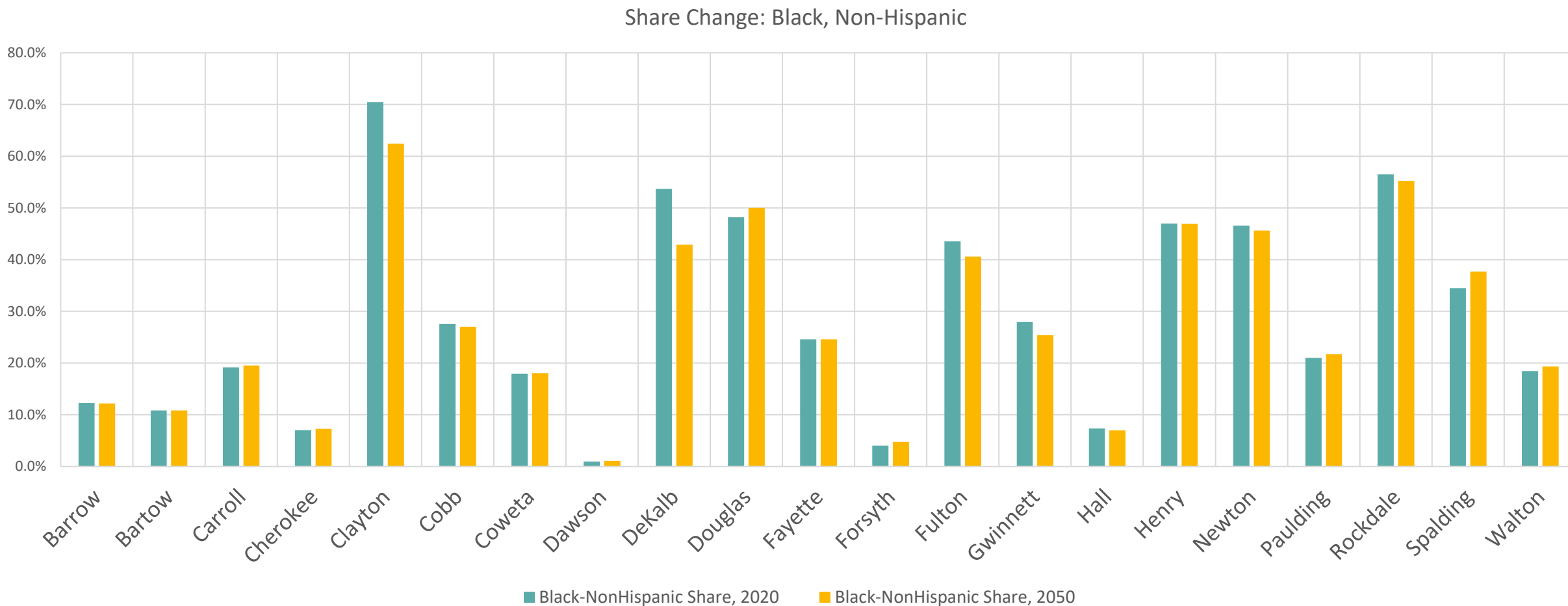
# Change By Race/Ethnicity: Black, Non-Hispanic

Black, Non-Hispanic, 2020-2050



Most jurisdictions will add Black, Non-Hispanic populations in forecast horizon, with Fulton adding the most, followed by Henry and Gwinnett

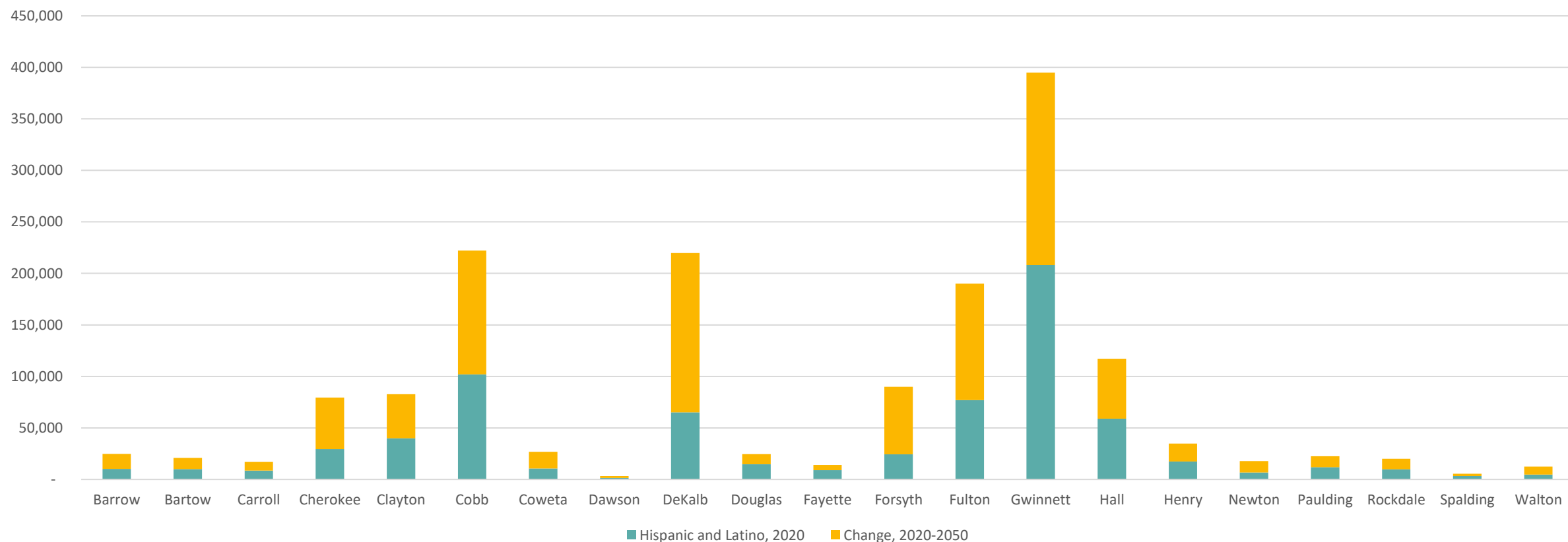
# Change in Share By Race/Ethnicity: Black, Non-Hispanic



Even though most jurisdictions will add Black population in forecast horizon, the *share* of Black population will decrease slightly in most jurisdictions-- as other races and ethnicities gain in share.

# Change By Race/Ethnicity: Hispanic and Latino

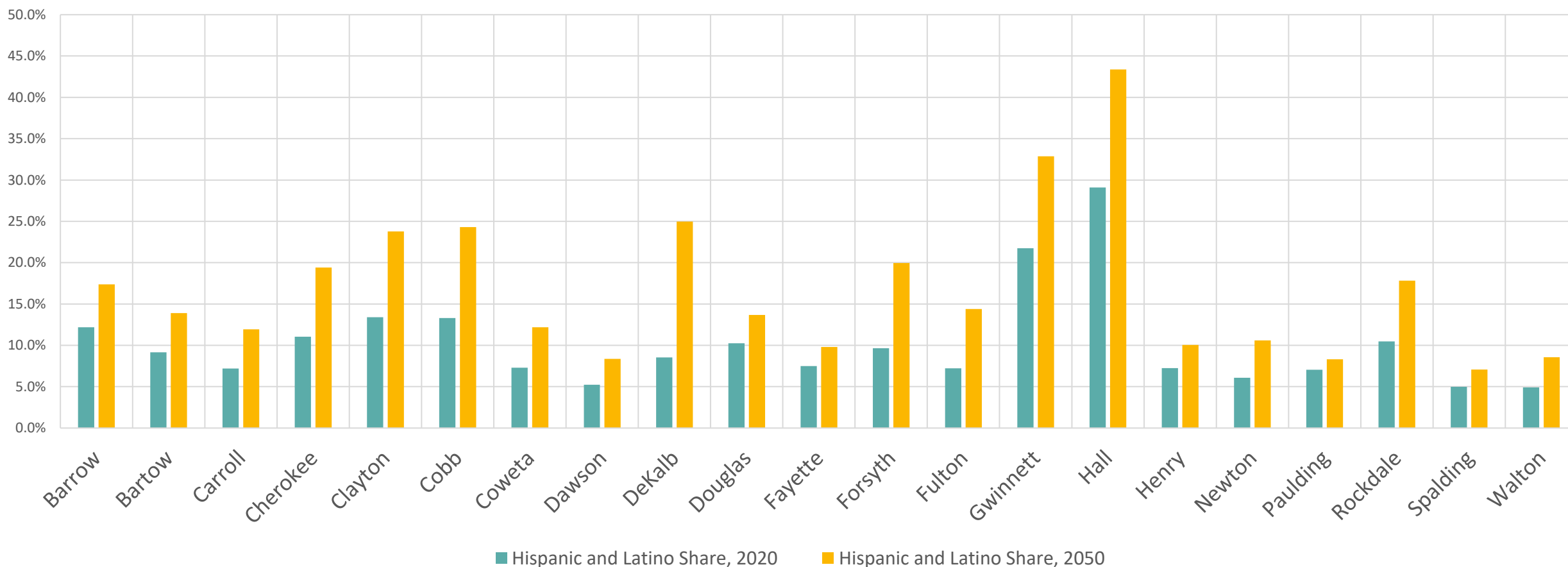
Hispanic and Latino, 2020-2050



Every jurisdiction will add Hispanic and Latino populations within the forecast horizon. Gwinnett will add the most, followed by DeKalb and Cobb.

# SHARE of Total Change By Race/Ethnicity: Hispanic and Latino

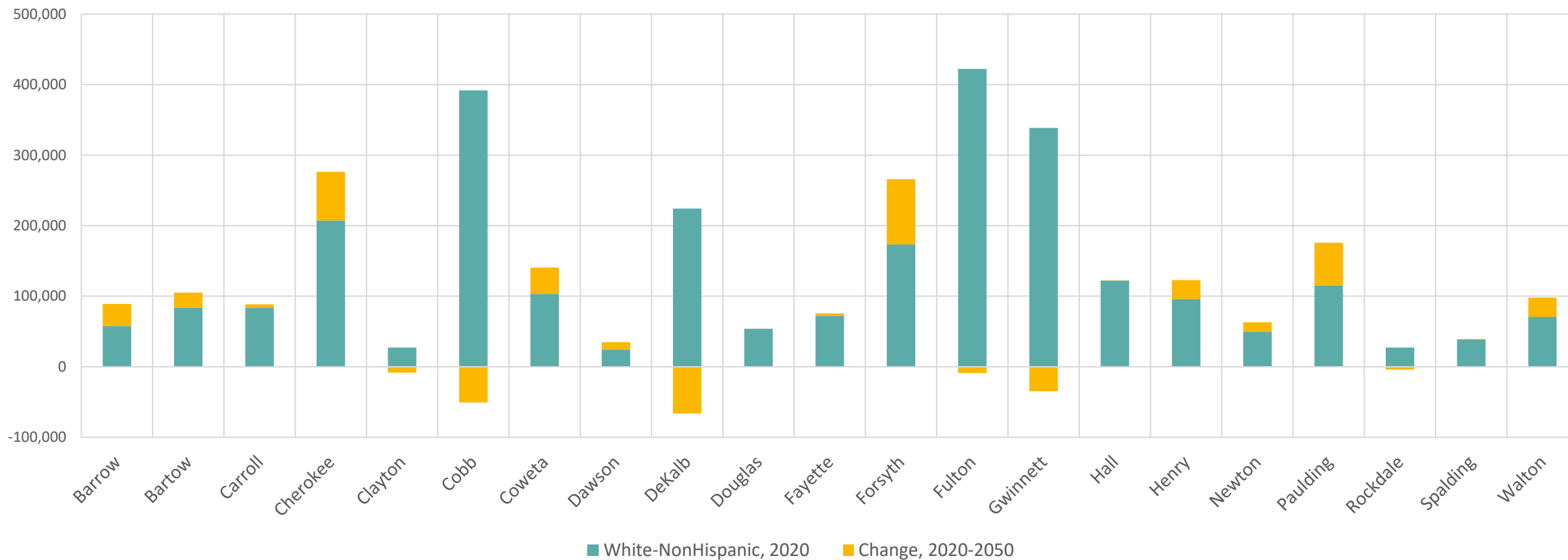
Share Change: Hispanic and Latino



Similarly, every jurisdiction will see a share increase in Hispanic and Latino populations. Hall and Gwinnett Counties, both with well over 20% Hispanic share in the base year of 2020, will see surges of Latino shares (of total population) to 43% and 33% respectively, by 2050.

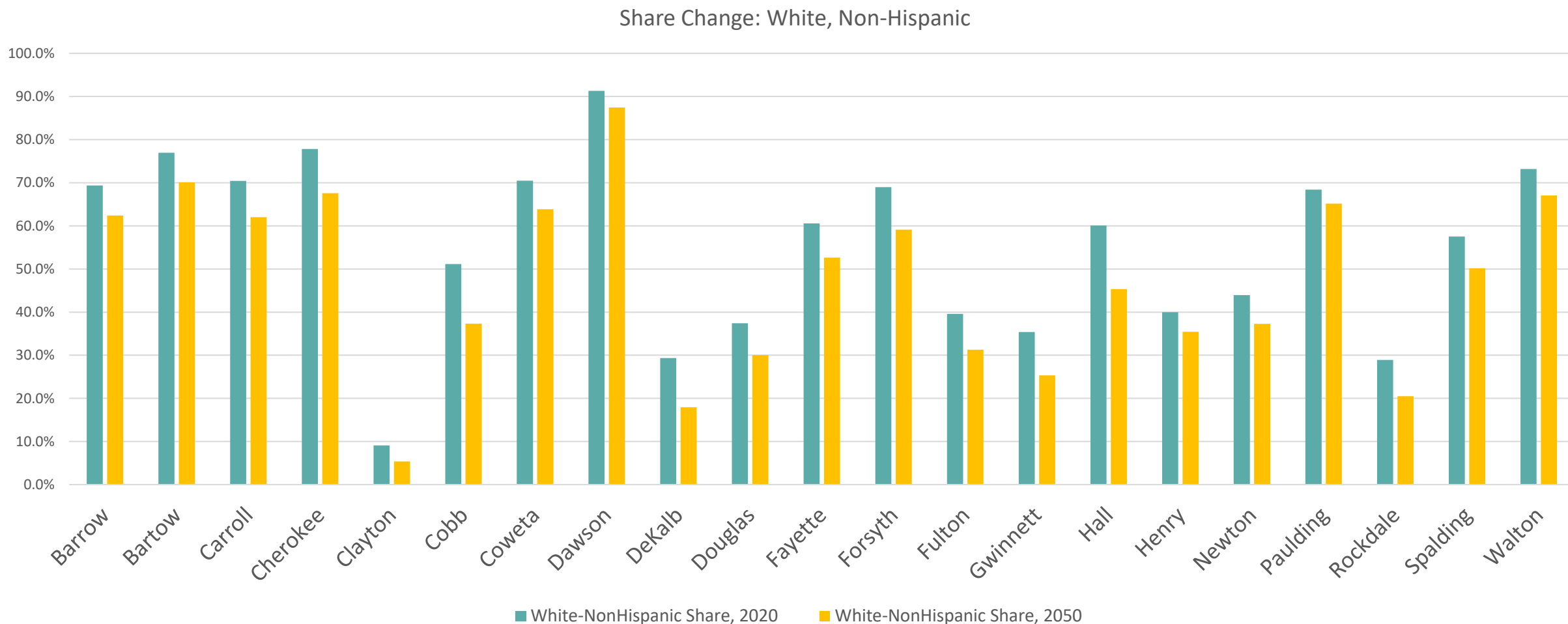
# Change By Race/Ethnicity: White, Non-Hispanic

White, Non-Hispanic, 2020-2050

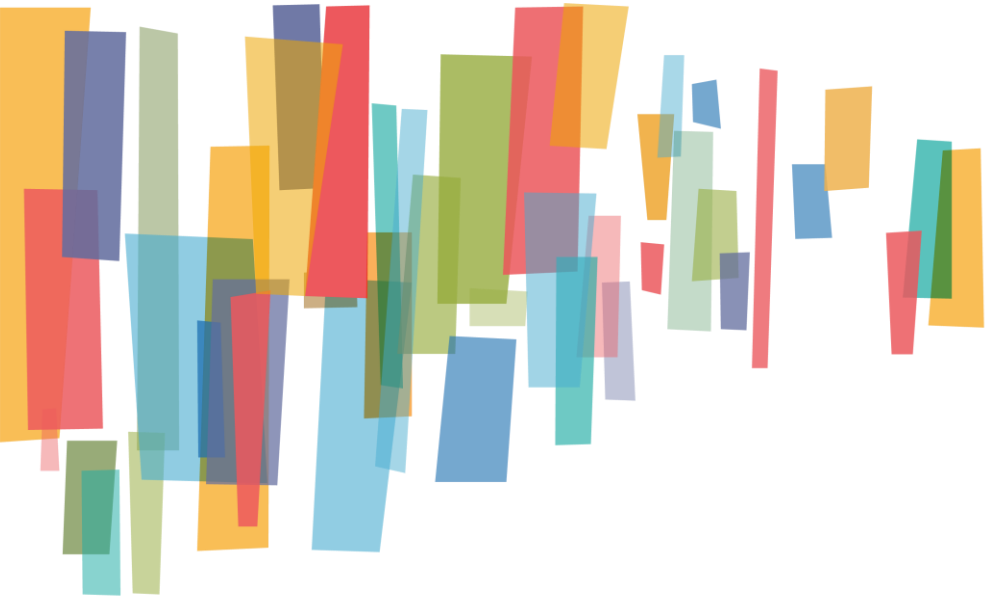


The large urban counties in the core will see declining "White, Non-Hispanic" populations, while there will be slight increases only in the outer counties.

# Change in Share By Race/Ethnicity: White, Non-Hispanic



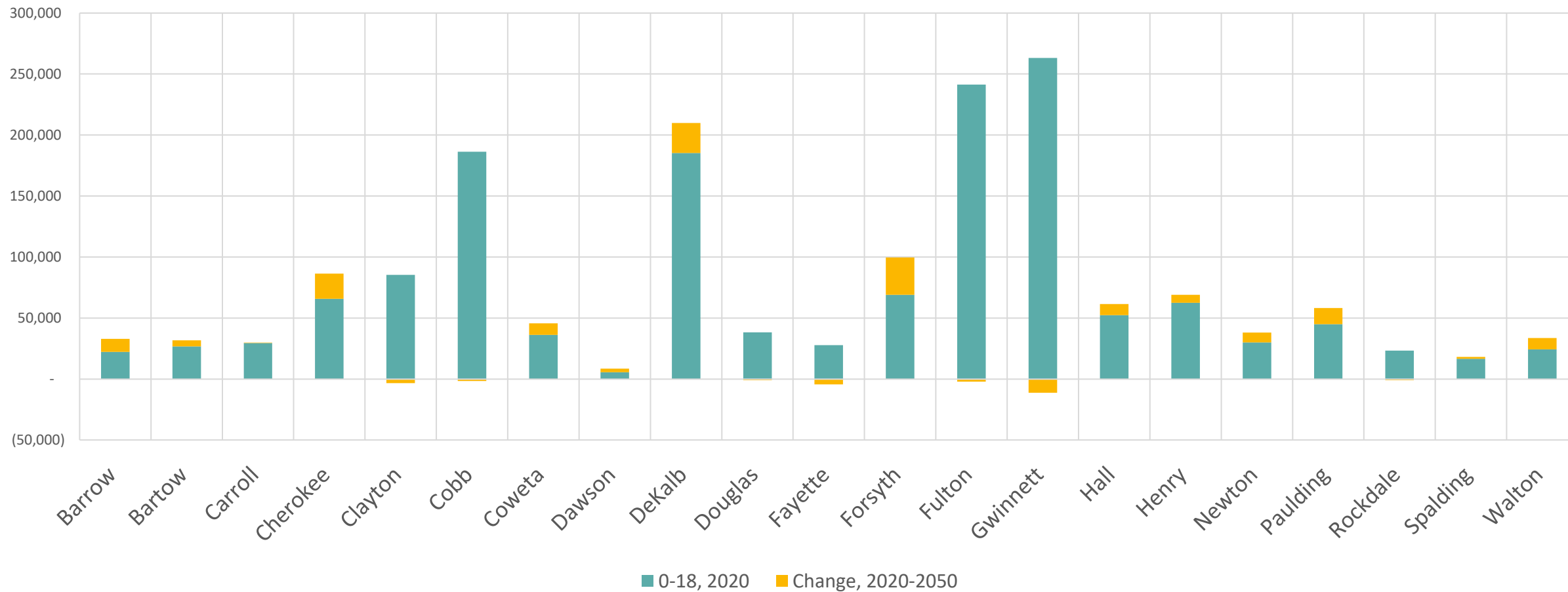
Correspondingly, every jurisdiction will see a decrease in the shares of their total populations that are White, Non-Hispanic.



# ARC's Series 17 Forecasts: *County Age Trends*

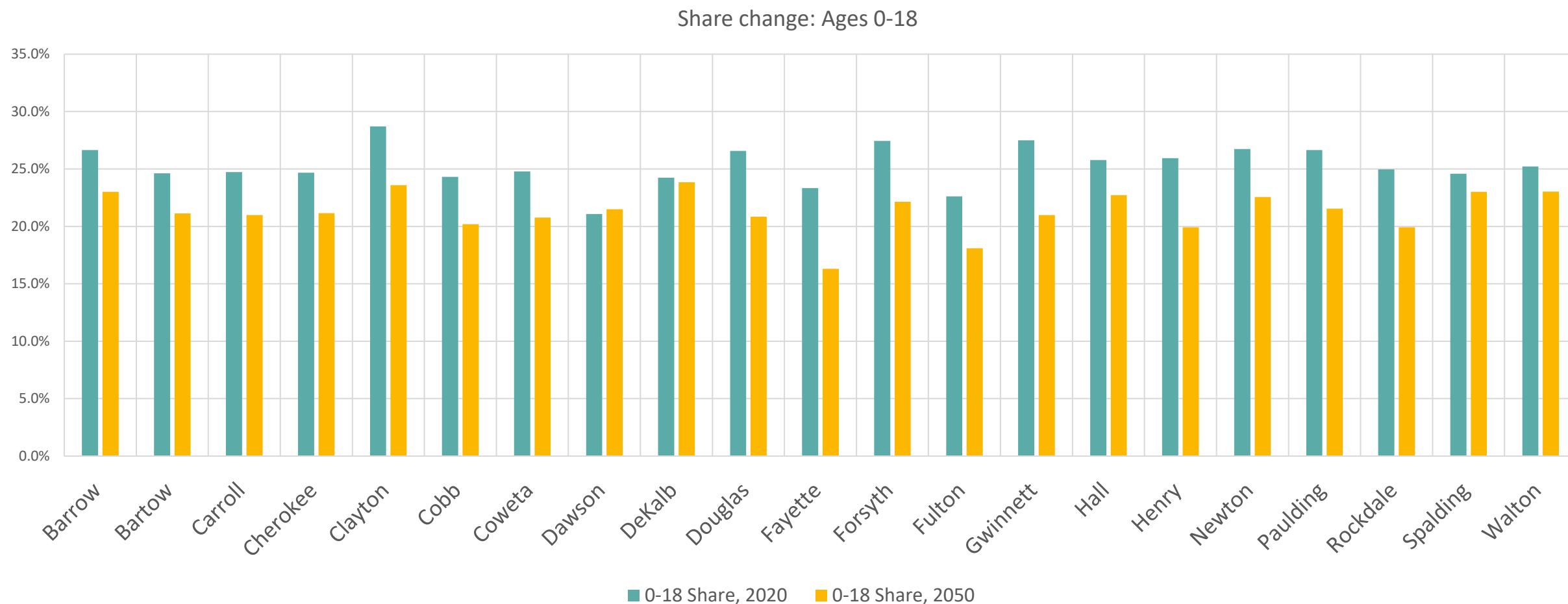
# Change By Age: 0-18

Ages 0-18, 2020 - 2050



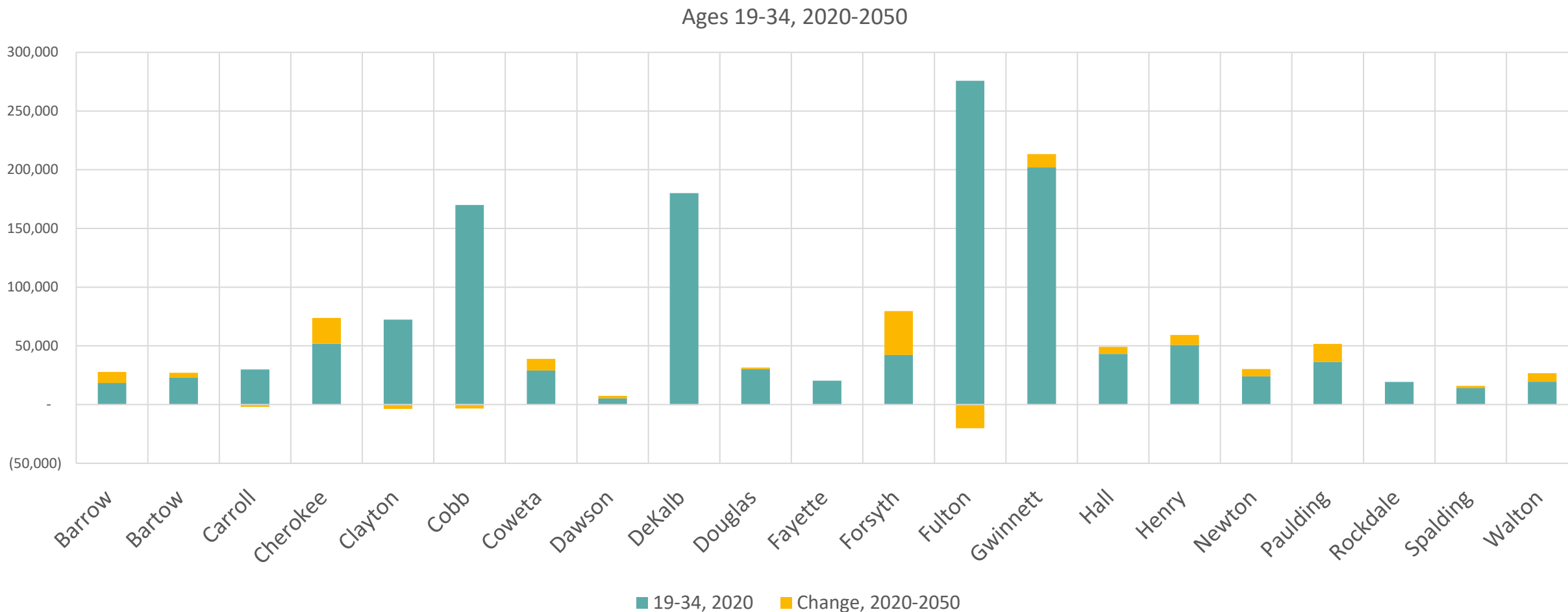
Most counties will see only a slight overall numeric increase in the 0-18 age cohorts, with a few (Fayette, Fulton, Gwinnett and Rockdale) seeing slight decreases.

# Change in Share of Population Aged 0-18



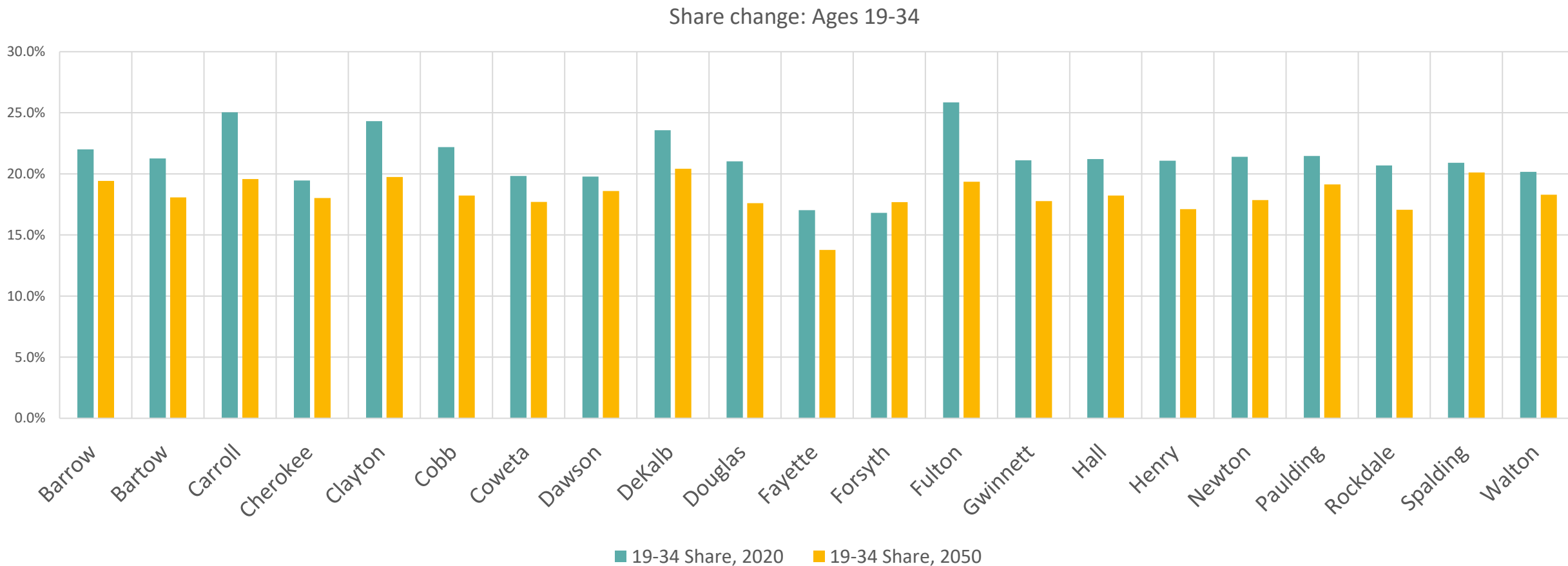
Similarly, every jurisdiction (except Dawson) will see a decline (to 2050) in the 0-18 cohort's share of total population.

# Change By Age: 19-34



As with the 0-18 age cohort, the 19-34 age cohort will see only slight increases in most counties, with slight declines in the urban core counties of Fulton, Cobb and Clayton.

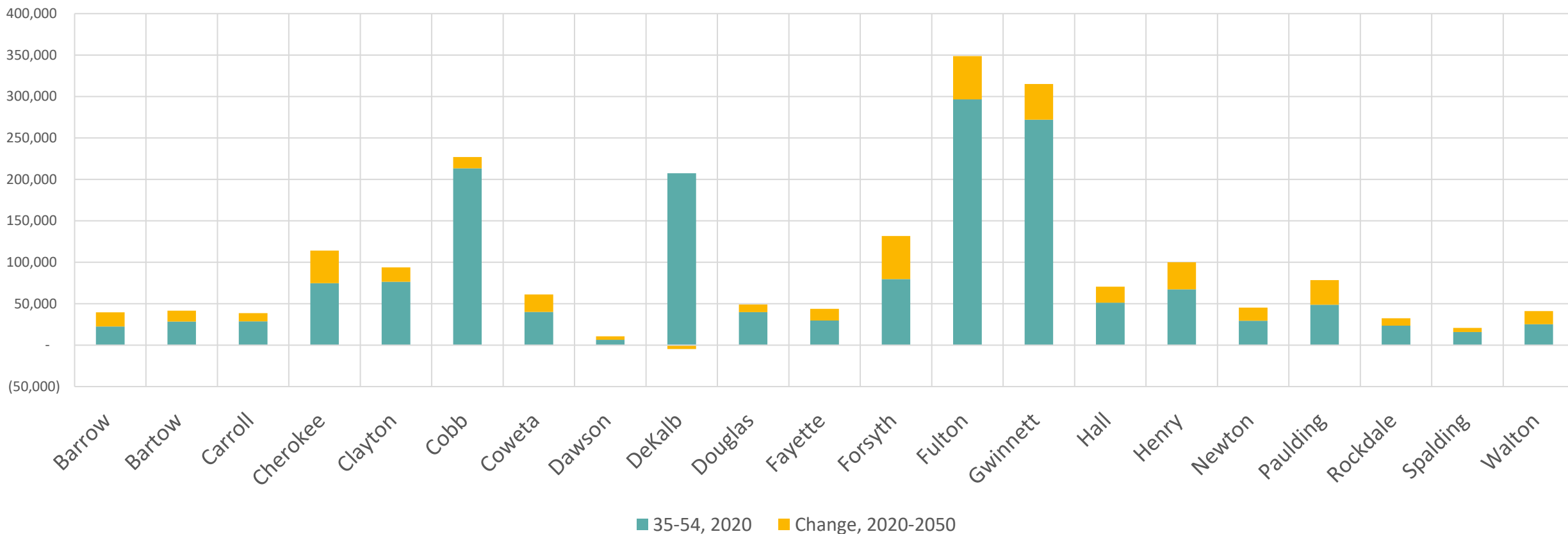
# Change in Share of Population Aged 19-34



Similarly, every jurisdiction (except Forsyth) will see a decrease (through to 2050) in the 19-34 cohort's share of total population.

# Change By Age: 35-54

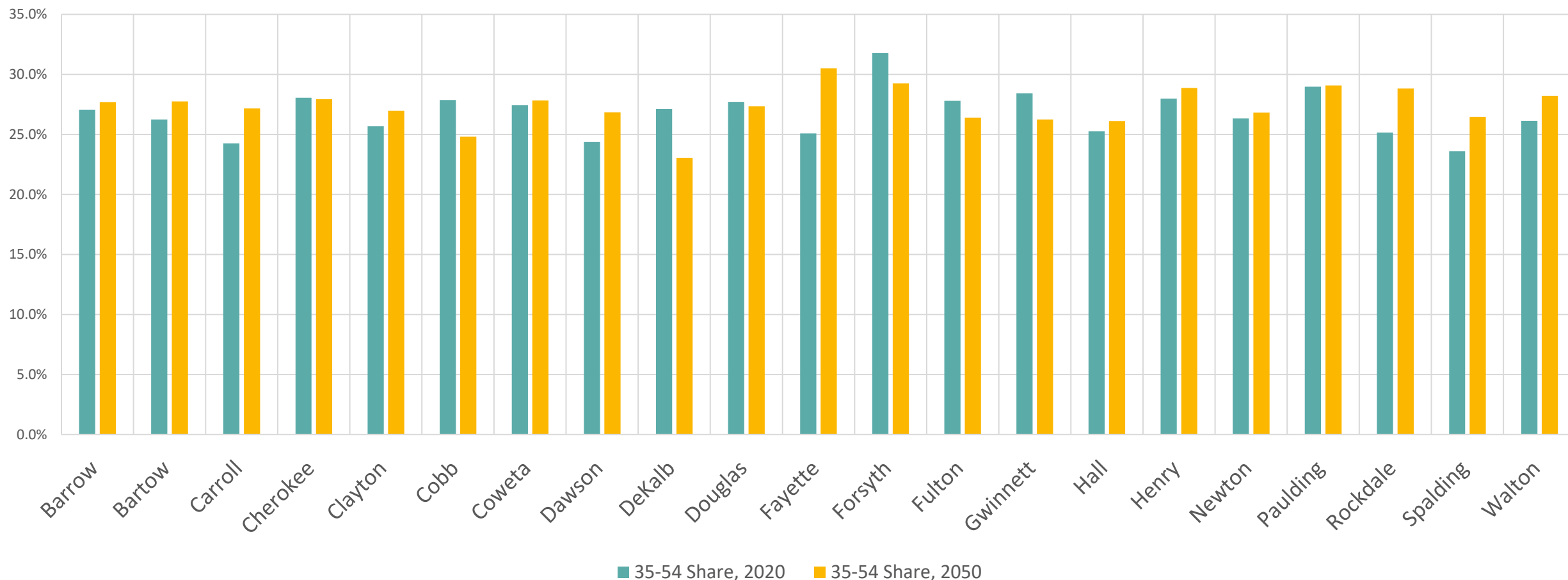
Ages 35-54, 2020-2050



In the 35-54 age cohort, every county (except DeKalb) will see slight increases over the forecast horizon.

# Change in Share of Population Aged 35-54

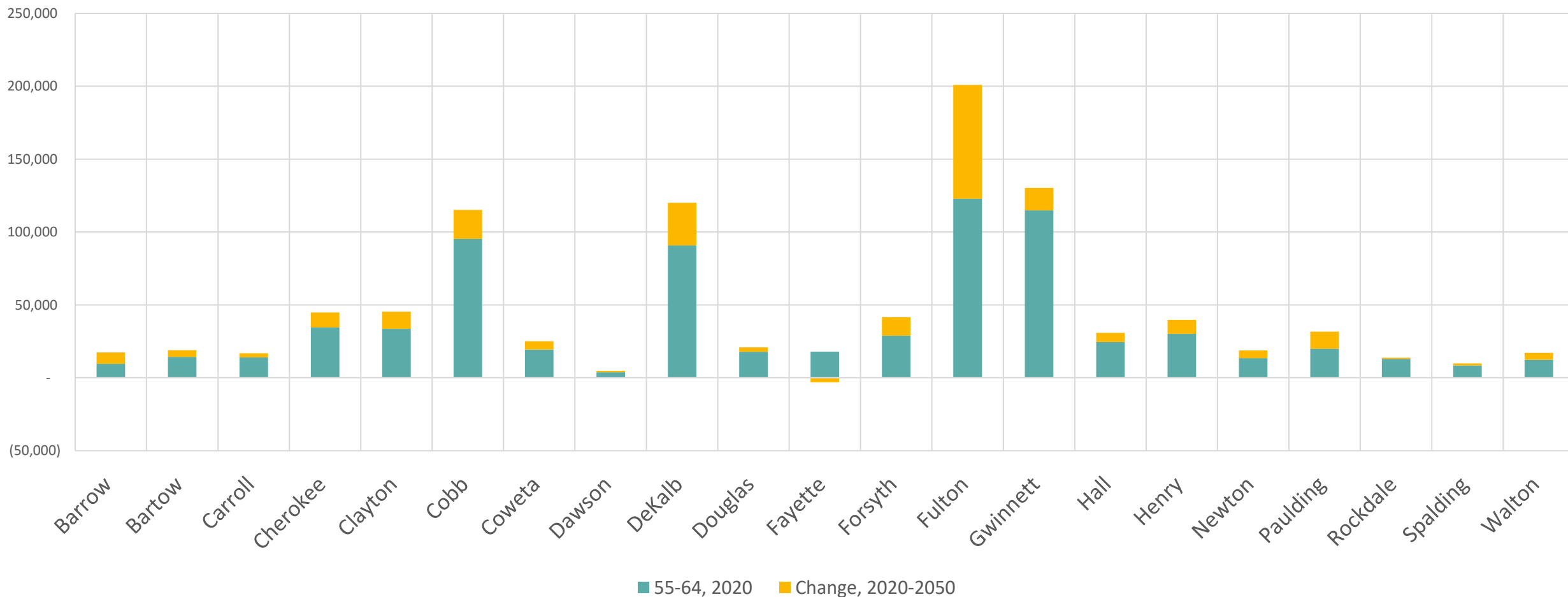
Share Change: Ages 35-54



In terms of share change in the 35-54 age cohort, the majority of counties will see a slight increase, but a few (such as Cobb, Forsyth, Fulton, and Gwinnett) will see some increase. Thus, there isn't much dramatic change over the forecast horizon for this age cohort.

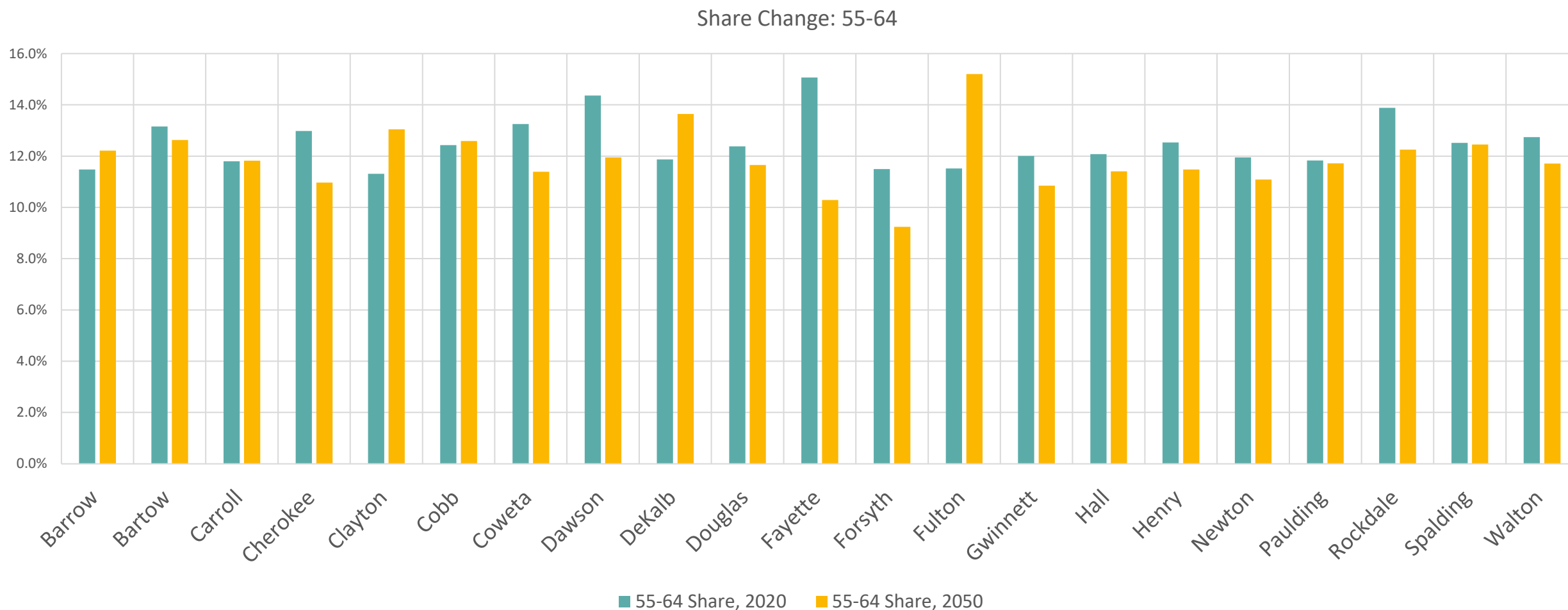
# Change By Age: 55-64

Ages 55-64, 2020-2050



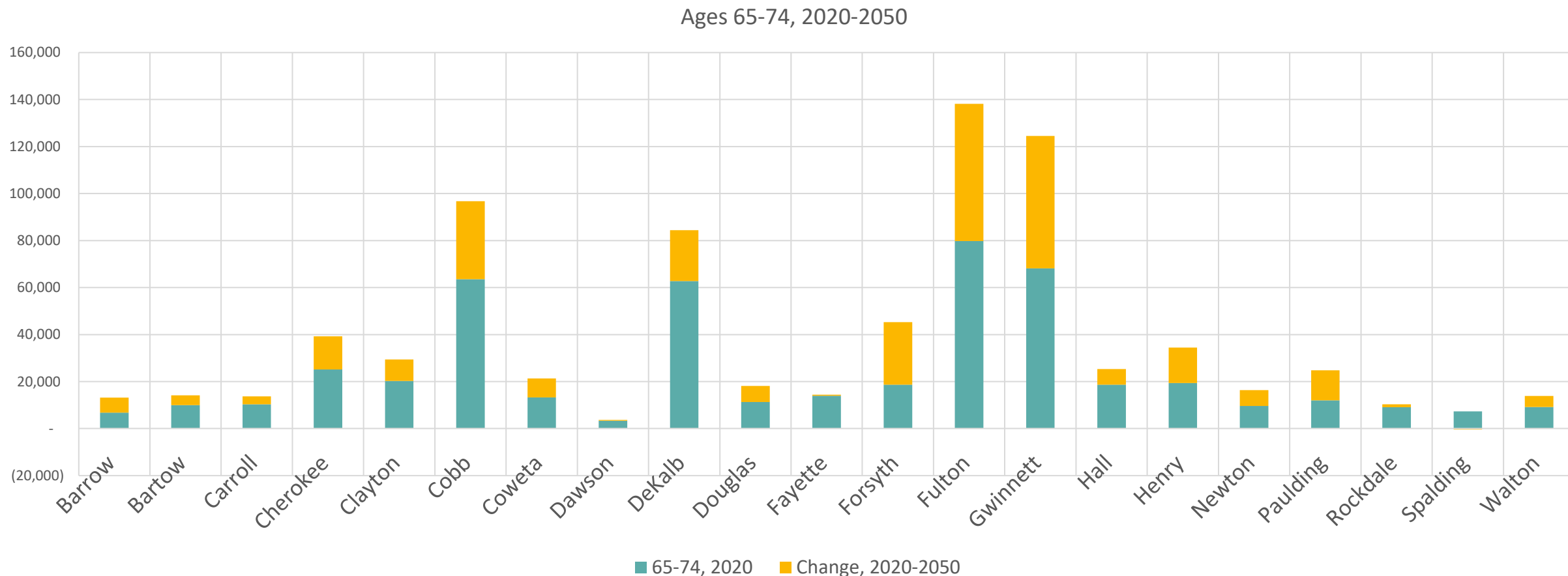
For the 55-64 age cohort, every county (except Fayette) will see slight increases over the forecast horizon.

# Change in Share of Population Aged 55-64



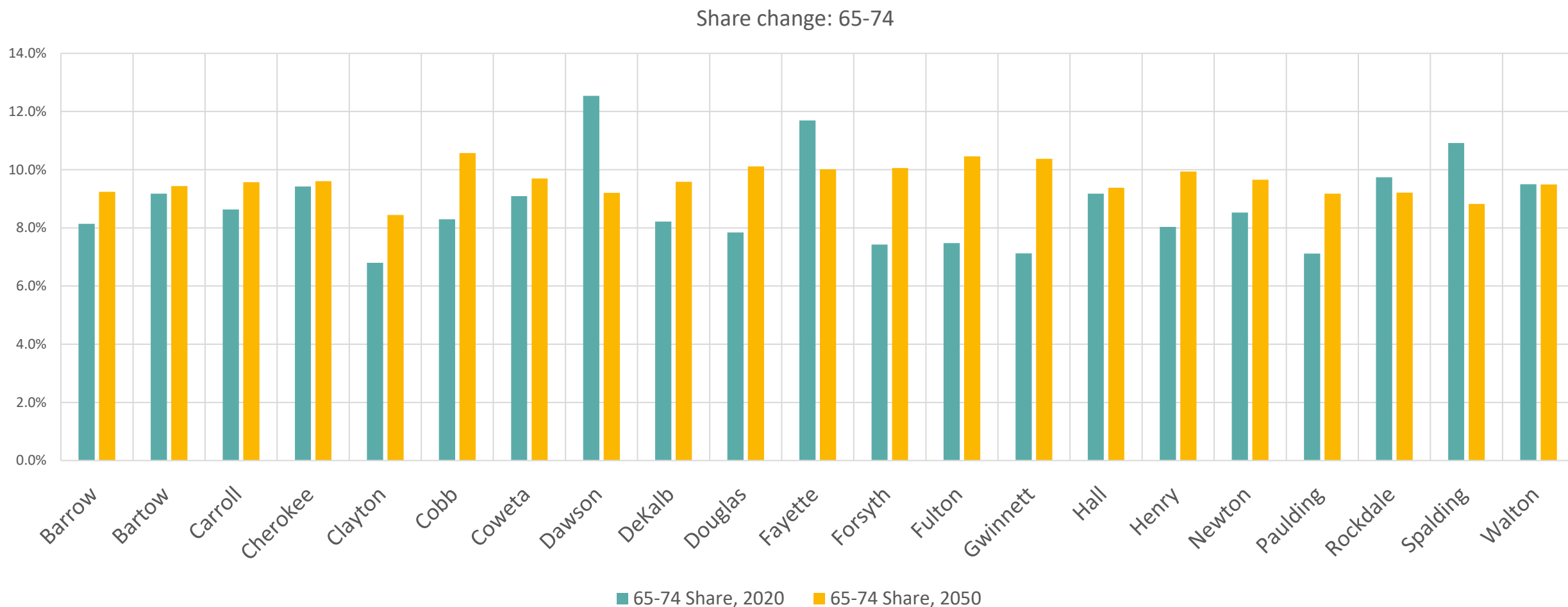
In terms of share change, most counties will see a slight dip for the 55-64 cohort, but several experience a slight increase in share. There isn't much dramatic change over the forecast horizon in the shares of this age cohort.

# Change By Age: 65-74



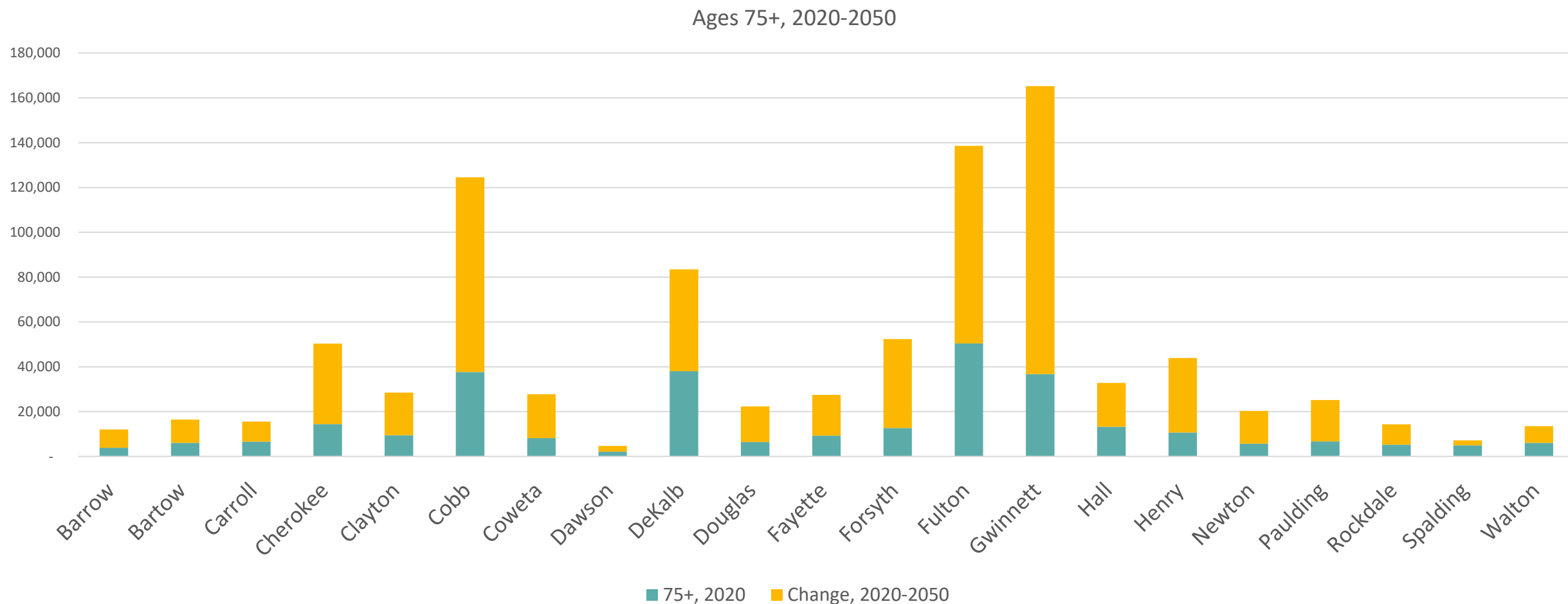
For the 65-74 age cohort, every county will see increases over the forecast horizon.

# Change in Share of Population Aged 65-74



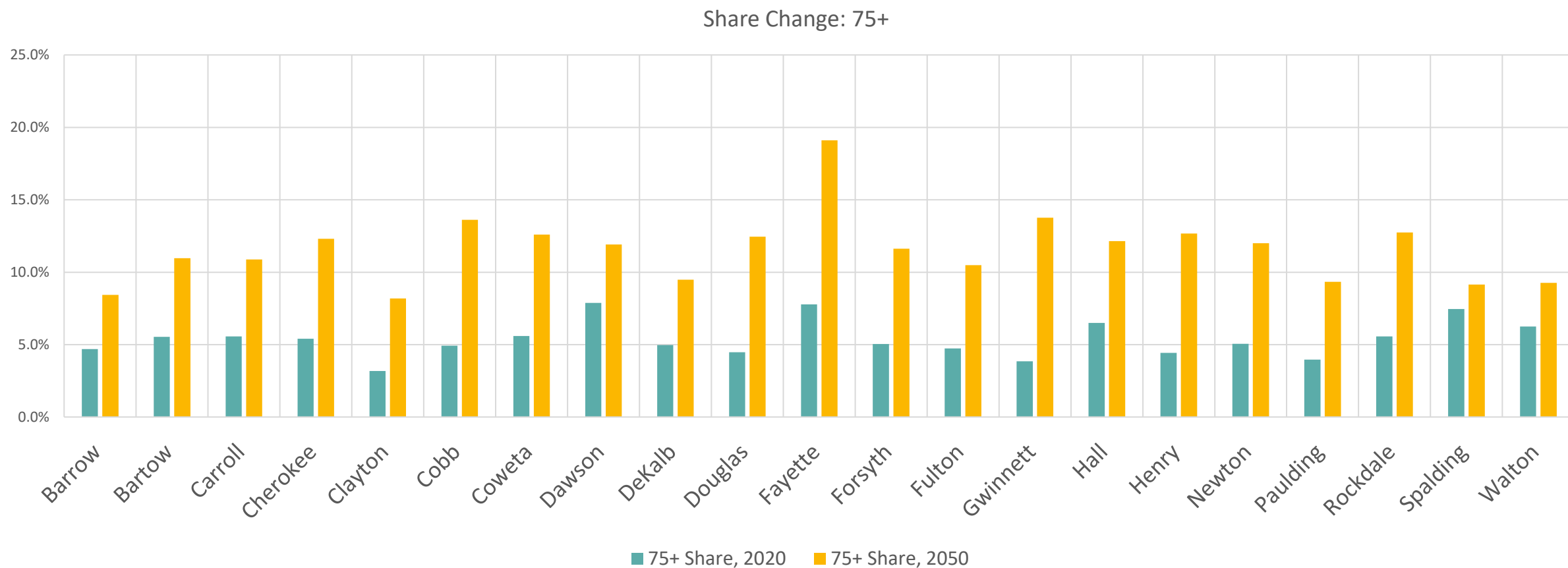
In terms of share change, most counties will see a strong increase in the 65-74 age cohort.

# Change By Age: 75+



For the 75+ age cohort, every county will see dramatic increases (more than double and triple current day levels) over the forecast horizon.

# Change in Share of Population for Age 75+



As would be expected, in terms of share change, all counties will see an increase in the 75+ age cohort.



# ARC's Series 17 Forecasts: *Employment*

# Forecast Job Growth By County: Just the Numbers

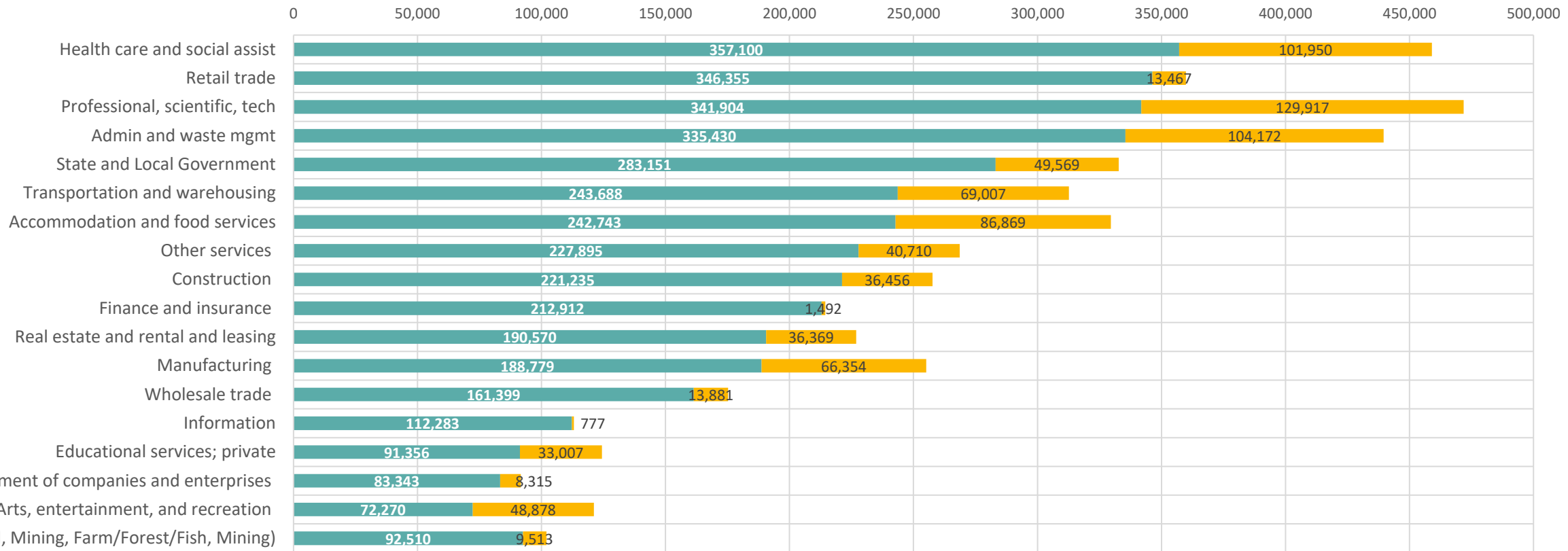
County	Employment 2020	Employment 2050	Change, 2020-2050	Average Annual % Change
Barrow	22,400	26,600	4,200	0.6%
Bartow	43,600	55,800	12,200	0.9%
Carroll	51,400	60,100	8,700	0.6%
Cherokee	72,900	96,100	23,200	1.1%
Clayton	145,100	167,400	22,300	0.5%
Cobb	415,100	495,400	80,300	0.6%
Coweta	47,000	61,200	14,200	1.0%
Dawson	10,200	11,300	1,100	0.4%
DeKalb	378,700	452,700	74,000	0.7%
Douglas	52,700	67,100	14,400	0.9%
Fayette	52,800	65,600	12,800	0.8%
Forsyth	87,300	106,200	18,900	0.7%
Fulton	907,000	1,115,400	208,400	0.8%
Gwinnett	410,200	494,900	84,700	0.7%
Hall	97,000	113,400	16,400	0.6%
Henry	69,800	89,300	19,500	0.9%
Newton	31,400	38,900	7,500	0.8%
Paulding	32,600	40,700	8,100	0.8%
Rockdale	41,700	50,200	8,500	0.7%
Spalding	28,700	38,200	9,500	1.1%
Walton	27,300	33,200	5,900	0.7%
<b>Total</b>	<b>3,024,800</b>	<b>3,679,700</b>	<b>654,900</b>	<b>0.7%</b>

Fulton will remain the region's largest job base during the forecast horizon. Note that the job totals shown on this table represent the jobs included in our transportation modeling (i.e., the at-place employment not including sole proprietors). The job growth to 2050 across the 21-county area, for this smaller grouping of jobs, is 655,000, rather than 860,000.

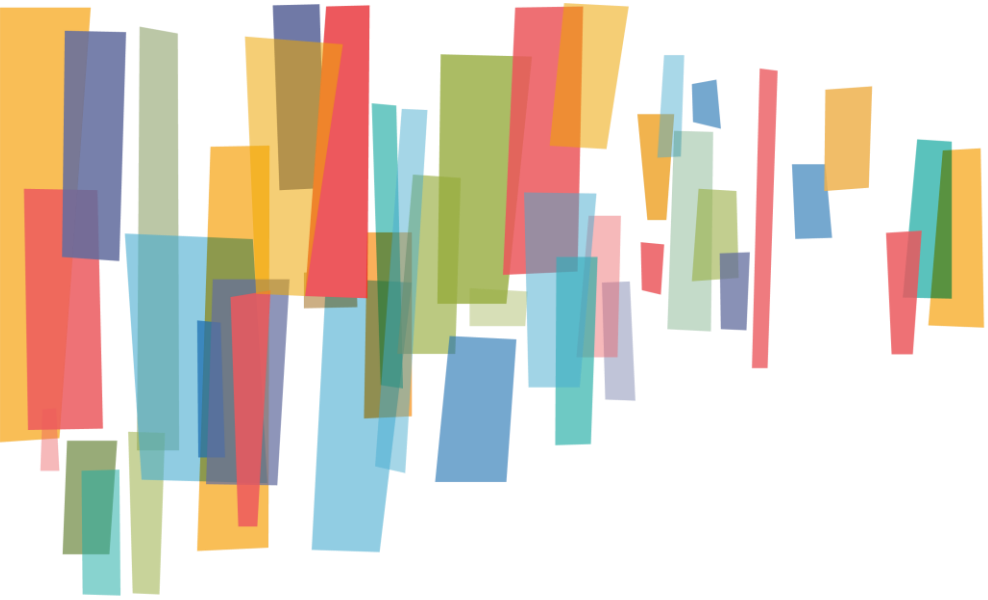
# Professional, Scientific, Tech Jobs To Be Largest Industry

Forecast Job Growth by Industry, 2020-2050

2020 Change, 2020-2050



This chart shows that while today the largest employment sector is Health Care/Social Assistance, by 2050 the Professional/Scientific/Technical industry will be the largest. **Key takeaway: In our previous forecast, Health Care was the largest sector by 2050. Now, at least initially, most data show that the technical occupations were the “winners” of the pandemic as we came to rely more on technology than ever to power our lives. Our employment forecast supports this early read.**

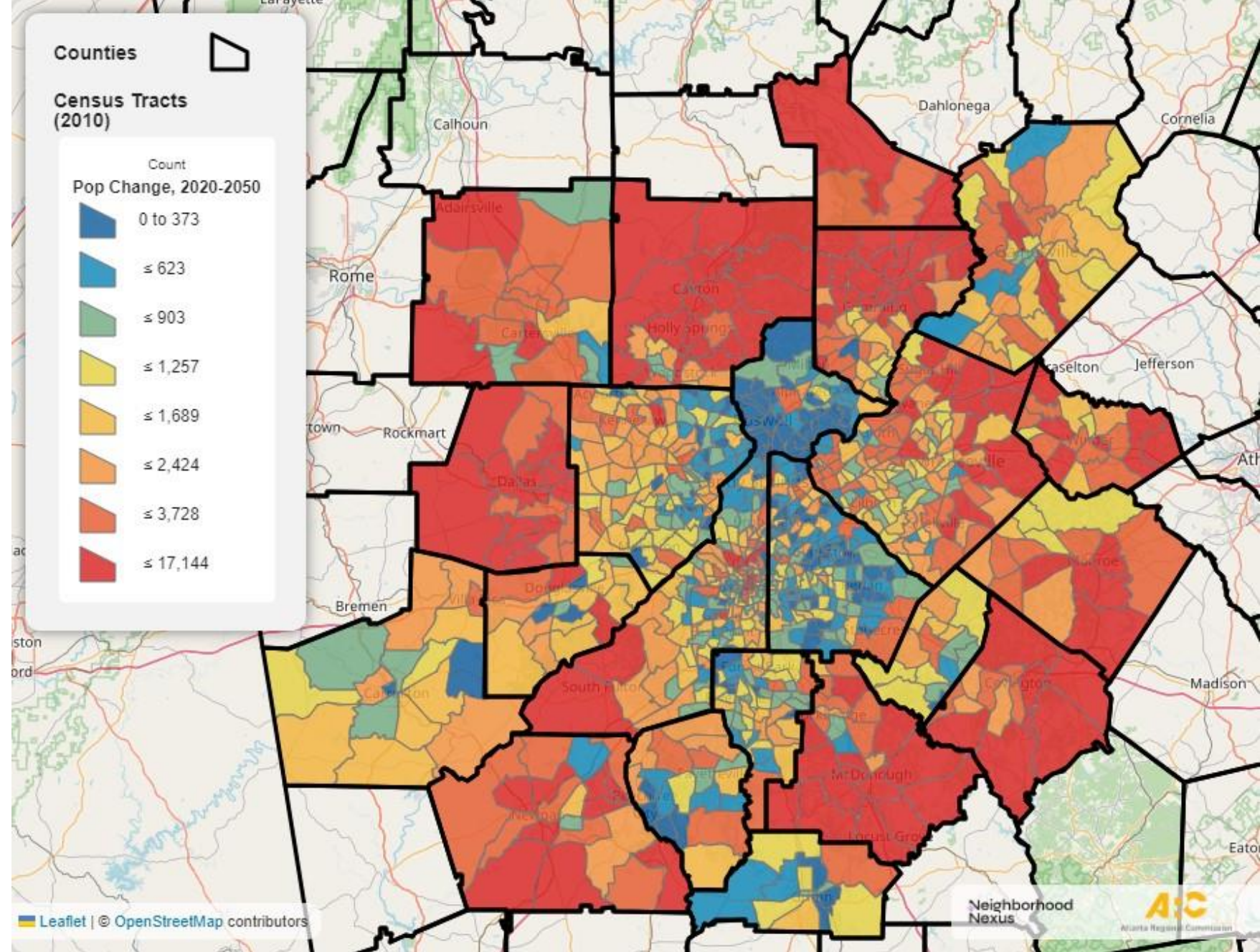


# ARC's Series 17 Forecasts: *Maps!*

# Total Population Change, 2020 - 2050

This map looks at total population change at the census tract level.

As can be seen, the outlying areas have the highest levels of total growth, but these areas also have the largest census tracts, so it is to be expected to see large numerical gains in these areas. There are, however, several tracts in the urban core that are “red”, meaning that these areas, too, are expected to gain significant population growth in the future.

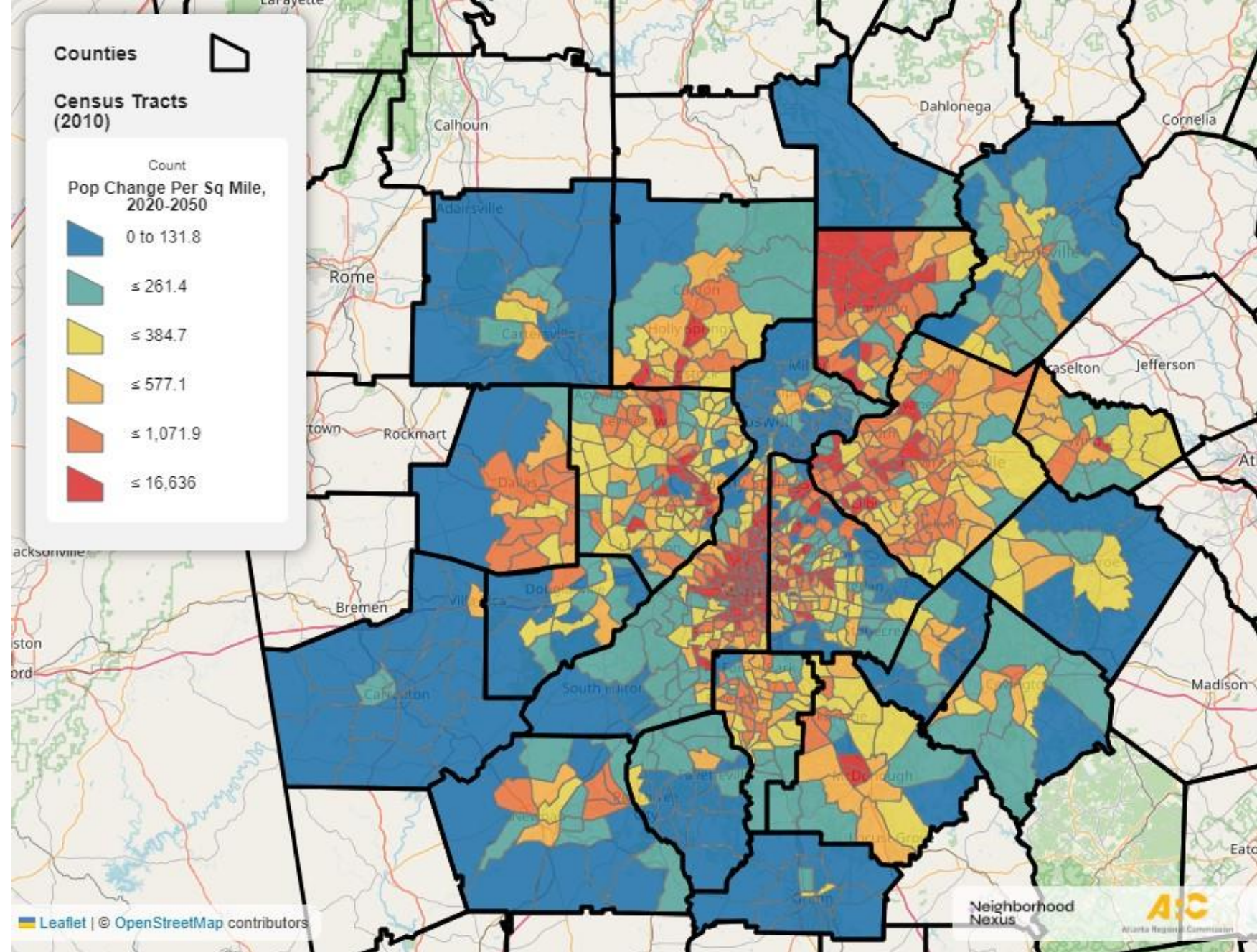


## Population Change Per Sq. Mile, 2020 - 2050

This map looks at population change per square mile at the census tract level. Therefore this is looking at which areas will densify the most.

As can be seen, this map serves as a stark contrast to the previous map as this normalizes for the size of the tract. Here we see that the urban core – in the city of Atlanta, areas surrounding Decatur in DeKalb, areas near the Vinings area in Cobb all will see significant densification in the upcoming years. This includes more suburban areas like Gwinnett, Forsyth and Cherokee (particularly near Woodstock) as well.

Finally, we see that many of those outlying areas there were “red” in the previous map are now blue because of the normalization by size of tract.



## Total Job Change, 2020 - 2050

This map looks at job change at the ARC's Superdistrict level. Superdistricts were created by ARC to be a consistent small area geography over time. They are made up of aggregations of census tracts.

As can be seen, most of the forecast job growth will go to the northern parts of the region, continuing a historical trend. There are areas south, particularly around the Airport and in Henry County where job growth will be robust as well.

