



Demographic Trends Report

Falls Church, Virginia

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Executive Summary

The demographic landscape in the City of Falls Church is changing. Part of these demographic changes reflect broader macro demographic trends in the country and the rest of the Northern Virginia region. There are also trends that distinguish the Little City from its neighbors. Demographic changes in the City will have important implications for future population growth, as well as for local policies related to housing, public services and facilities, and economic development. Key findings from this analysis of demographic trends include the following:

Households with Children. The City of Falls Church continues to be attractive to families, but the number of households with children in the City has actually been on the decline. The City's growth in recent years has been primarily driven by people living alone and renters without children. The City's changing housing stock is reflected in the change in the household composition. Growth in the number of multifamily units, and specifically the number of studio and one-bedroom units, is the reason for that childless households have been a key driver of growth in the City.

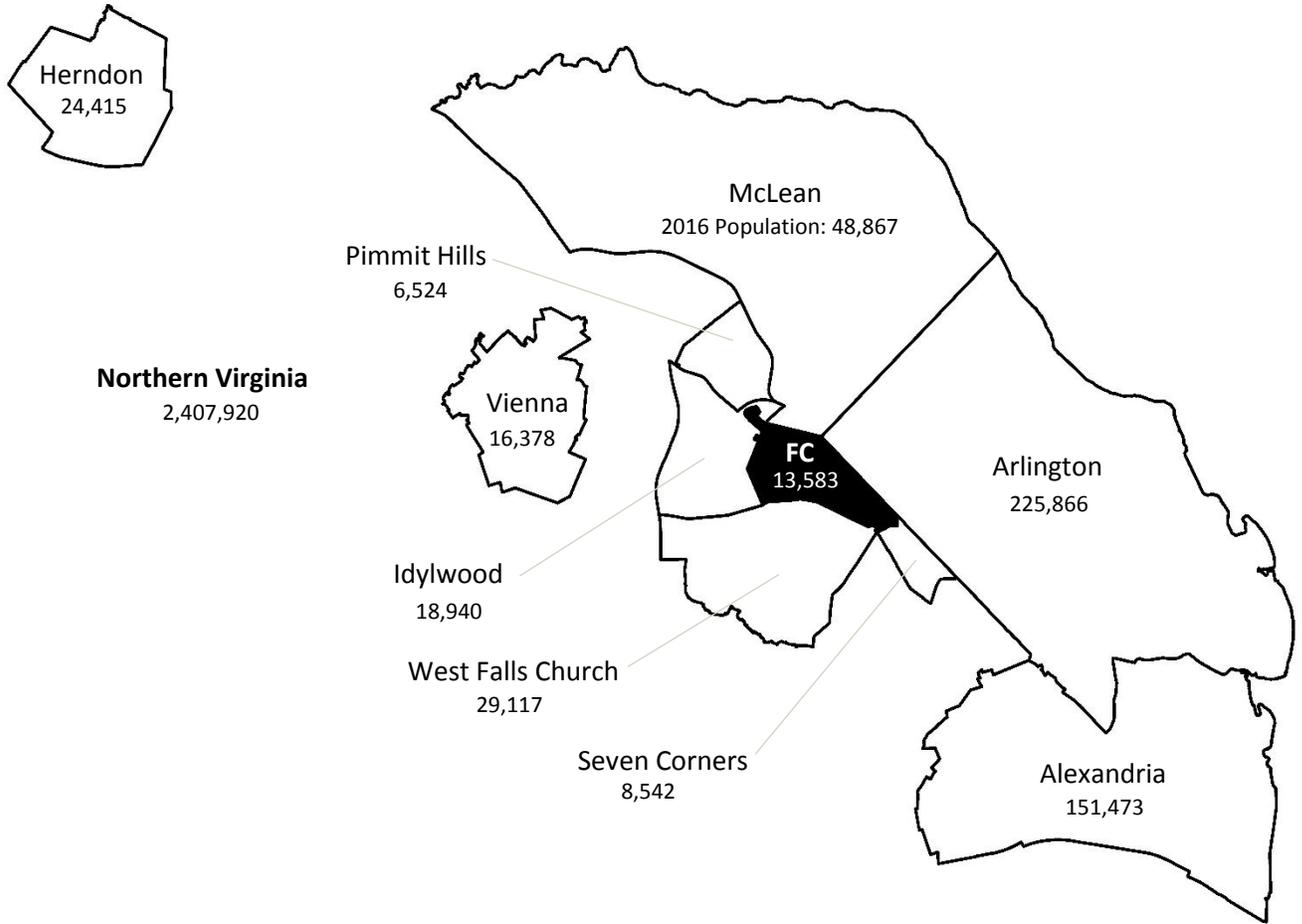
Racial and Ethnic Minorities. While the population in Northern Virginia is becoming increasingly racially and ethnically diverse, the population of the City of Falls Church has remained largely white. Over time, the City's non-white population is likely to grow, even if slowly, as a result of higher fertility rates, a higher share of childbearing age women among the non-white population, and continued growth of the non-white population regionally.

Workforce. The resident workforce in the City looks significantly different from the at-place workforce. For example, City residents are much more likely to be employed in Public Administration or Professional/Technical Services jobs. By contrast, at-place jobs in the City are much more likely to be in the Retail Trade and Accommodation and Food Services sectors. The City of Falls Church tends to have an economy more highly concentrated in Retail Trade jobs and less concentrated in Professional/Technical Services jobs than the Northern Virginia region as a whole.

Looking Ahead. As of 2017 there were approximately 14,583 people living in the City. Between 2010 and 2017 the City's population grew by an estimated 2,251 people, or an annual growth rate of 2.6%. Population growth is driven by natural increase (i.e. births minus death) plus net migration (including both domestic and international migration.) If the current pace of growth continues in the City of Falls Church, more population growth will have occurred the decade between 2010 and 2020, than the two previous decades combined (1990 to 2010). Beyond the just the number of new City residents, this population growth is changing the demographic landscape in the City.

This report examines local demographic trends, comparing population, household and workforce characteristics in the City to communities in Northern Virginia that are both relative in size and geography to Falls Church. The geography examined includes communities adjacent to Falls Church such as Seven Corners, West Falls Church, Idylwood, Pimmit Hills, McLean, and Arlington County; as well as the towns of Vienna and Herndon, and the City of Alexandria.

Context Map – Falls Church and the Northern Virginia Region



Source: U.S. Census Bureau, 5-Year American Community Survey (2012-2016)



Population Trends



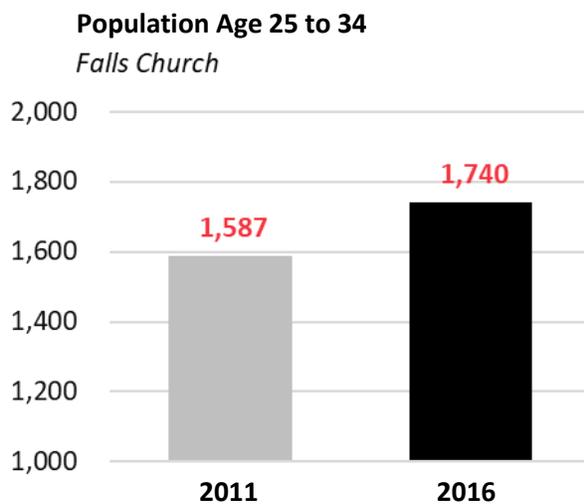
This section examines three key population segments of City residents: Millennials (age 25 to 34), School Age (age 5 to 17) and Older Adults (age 55+). This section also analyzes the racial and ethnic composition of the City’s population.

Millennials

Millenials are a growing share of the City’s population, though the increase is less than in some adjacent areas. There were approximately 1,740 people between the ages of 25 and 34 living in Falls Church in 2016. The number of Falls Church residents in this age group has increased by about 9.7% over five years. The growth rate of the young adult population in Falls Church is similar to other inside-the-Beltway communities such as Arlington and West Falls Church, which had increases in the young adult population of 10.1% and 9.2%, respectively, during the same five-year time period. Overall, the Northern Virginia region experienced a 6.2% increase in this age segment between 2011 and 2016. The City has experienced a higher growth rate in the population age 25 to 34 than either Vienna and Herndon, but a lower growth rate than areas just beyond the City limits such as Idylwood and Pimmit Hills.

The City of Falls Church has a wider range of multi-family housing stock than Vienna or Herndon which could explain why the City’s 25 to 34-year-old population has grown relatively faster. In addition, Falls Church is closer to the transit infrastructure, job centers, and urban amenities compared to some of the communities with slower millennial growth. These location characteristics tend to be sought-after by millennials. On the other hand, Idylwood and Pimmit Hills tend to have lower price-points than the City, which could help explain the greater gains in young adults in those communities.

Population Age 25 to 34 % Change 2011 to 2016	
Idylwood	+24.0%
Pimmit Hills	+12.3%
Arlington	+10.1%
Falls Church	+9.7%
West Falls Church	+9.2%
Alexandria	+6.5%
Northern Virginia*	+6.2%
Seven Corners	+6.0%
McLean	+2.7%
Herndon	-6.0%
Vienna	-23.0%



Source: U.S. Census Bureau, 5-Year American Community Survey (2012-2016 and 2007-2011)

*Includes the cities of Falls Church, Fairfax, Alexandria, Manassas and Manassas Park; and the counties of Arlington, Fairfax, Loudoun and Prince William

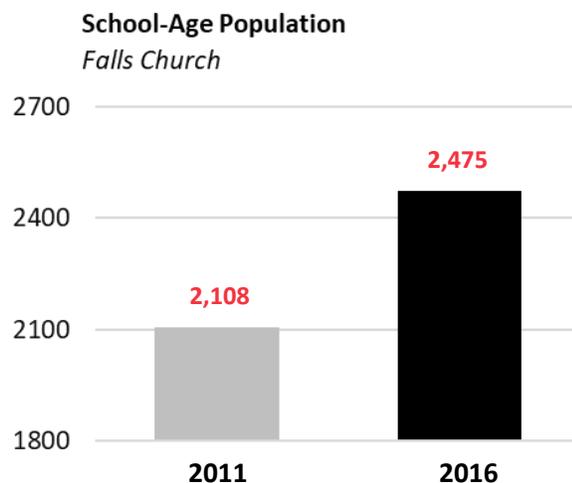
School-Age Children

The number of school-age children in the City is increasing, but the growth rate has been slower than in other Northern Virginia communities. There were approximately 2,475 school-age children (age 5 to 17) living in Falls Church in 2016, which is 17.4% more than 2011. Similar trends are occurring throughout Northern Virginia with the sharpest growth in the region occurring just outside the City limits in Seven Corners (+48.4%), Idylwood (+21.3%), and Arlington (+22.5%). Pimmit Hills was the only community in the study area to experience a decline in the school-age population, with 29.5% fewer school-age children in 2016 than in 2011.

The increase in the number of school-age children throughout Northern Virginia reflect a population base that is becoming more racially diverse. Racial and ethnic minorities tend to be more likely to be of childbearing age than are whites and also tend to have higher overall fertility rates. These macro-level trends are a key driver of the growth in school-age children in the diversifying Northern Virginia region.

In Falls Church, another trend is driving the increase in the number of children. The data suggest that a subset of families in Falls Church is having more children than in the past. The average household size in the City went from 2.46 in 2011 to 2.56 in 2016 and this increase was driven by home owners, with an average household size increasing from 2.65 in 2011 to 2.93 in 2016. The average size of renter households actually declined during this same time period, going from 2.15 to 2.0. Between 2011 and 2016 the number of households with 3 or more children grew by 20.4%, primarily among home owners, while the number of households with 1 or 2 children declined by 9.8%. Thus, while the number of children has increased in the City, the overall number of households with children has actually declined over time (see Household Trends section).

School-Age Population % Change 2011 to 2016	
Seven Corners	+48.4%
Idylwood	+26.3%
Arlington	+22.5%
Vienna	+21.3%
Alexandria	+18.4%
Falls Church	+17.4%
Herndon	+16.5%
West Falls Church	+12.2%
McLean	+11.6%
Northern Virginia*	+10.9%
Pimmit Hills	-29.5%



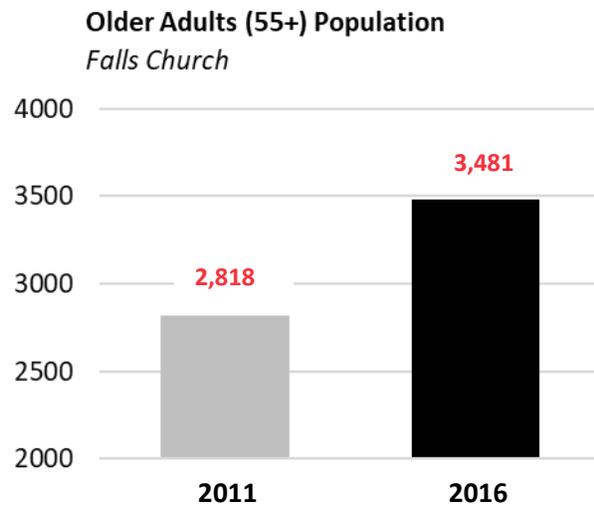
Source: U.S. Census Bureau, 5-Year American Community Survey (2012-2016 and 2007-2011)

*Includes the cities of Falls Church, Fairfax, Alexandria, Manassas and Manassas Park; and the counties of Arlington, Fairfax, Loudoun and Prince William

Older Adults (55+)

About one out of four Falls Church residents are age 55 and older which is similar to the regional share. As Baby Boomers age, the older adult population is forecasted to grow substantially over the coming years, both locally and nationally. In 2016, there were approximately 3,481 people age 55 or older living in Falls Church, an increase of 23.5% over 2011. Similar growth is occurring throughout the region particularly in areas immediately adjacent to Falls Church such as Idywood (+31.1%) and Seven Corners (+27.1%). The Northern Virginia region as a whole had an increase of over 91,000 residents in the 55+ age segment between 2011 and 2016. As the youngest baby boomers (born in the early 1960s) continue to age into this 55+ demographic segment, these growth trends will continue, both locally and nationally.

Age 55+ Population	
<i>% Change 2011 to 2016</i>	
Idylwood	+31.1%
Herndon	+27.3%
Seven Corners	+27.1%
Falls Church	+23.5%
McLean	+23.5%
Northern Virginia*	+21.8%
Arlington	+13.7%
Alexandria	+13.3%
Vienna	+11.0%
West Falls Church	+10.2%
Pimmit Hills	+9.6%



Source: U.S. Census Bureau, 5-Year American Community Survey (2012-2016 and 2007-2011)

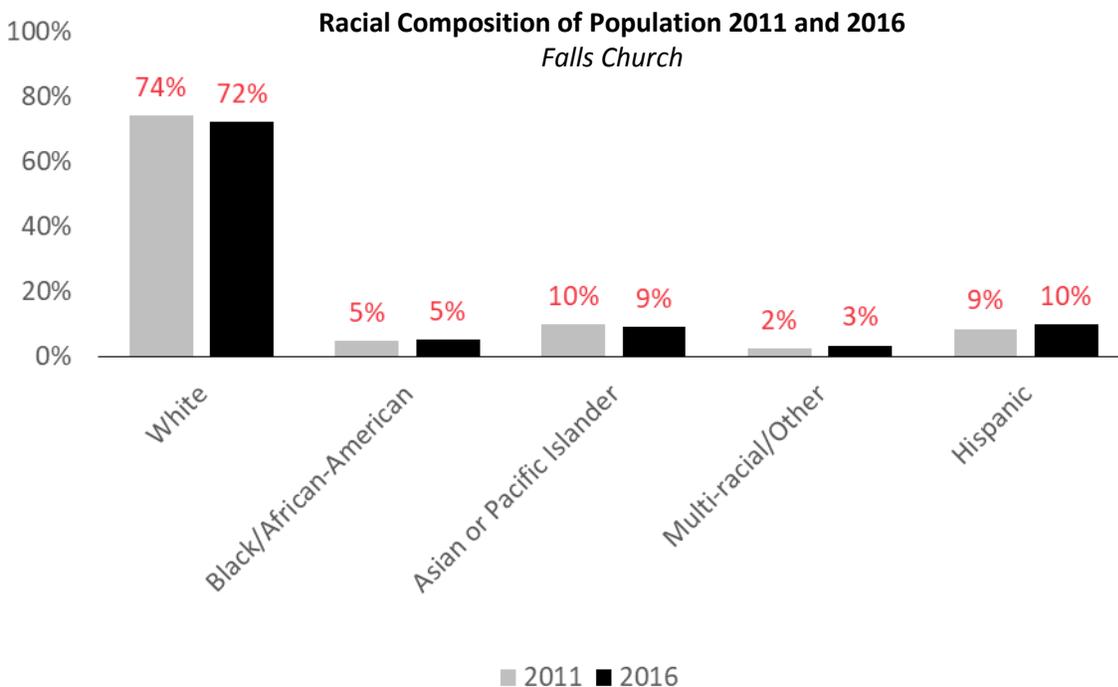
*Includes the cities of Falls Church, Fairfax, Alexandria, Manassas and Manassas Park; and the counties of Arlington, Fairfax, Loudoun and Prince William

Racial and Ethnic Diversity

Falls Church is one of the least racially and ethnically diverse communities in a diversifying region.

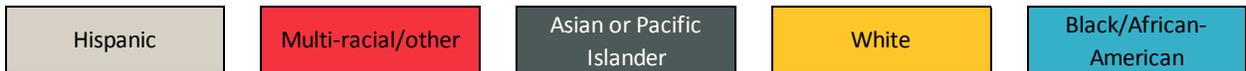
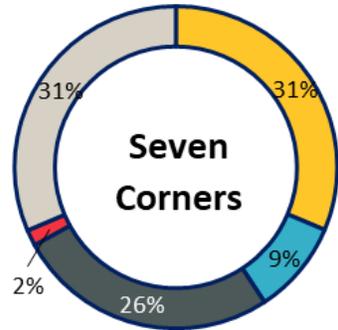
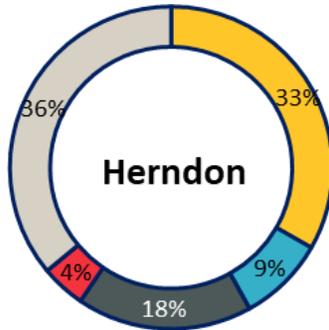
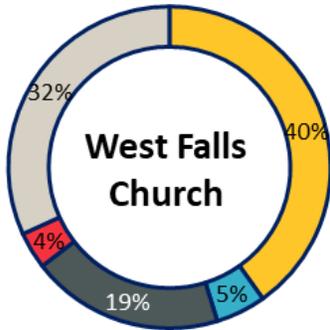
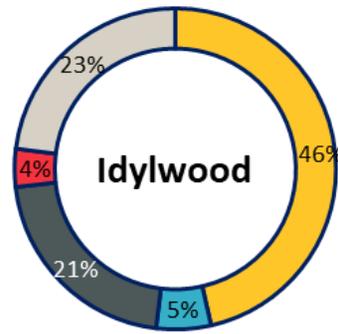
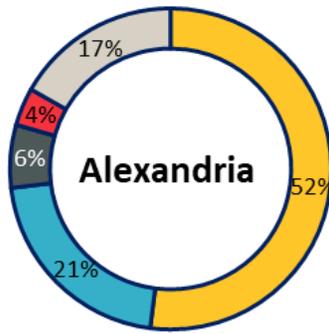
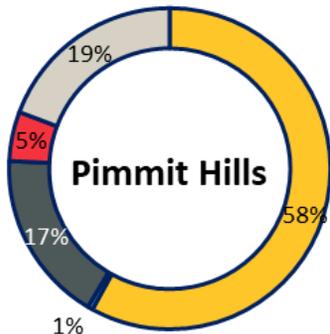
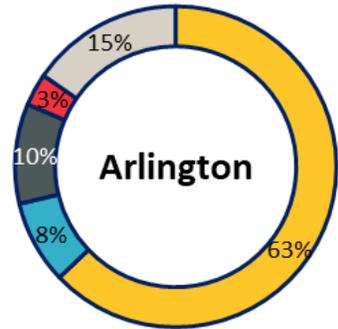
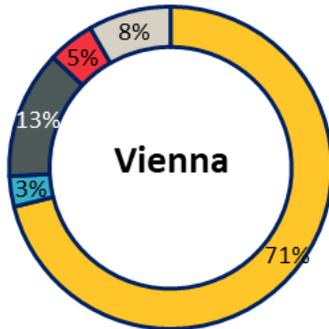
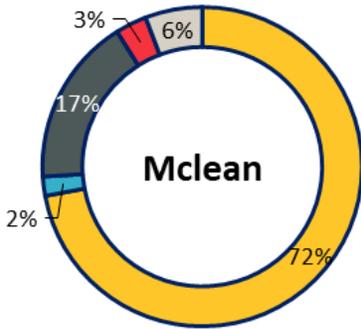
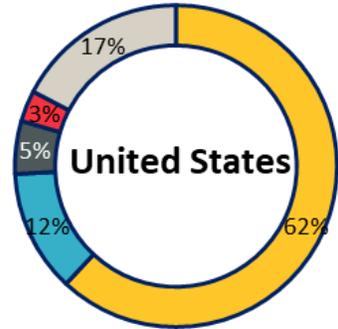
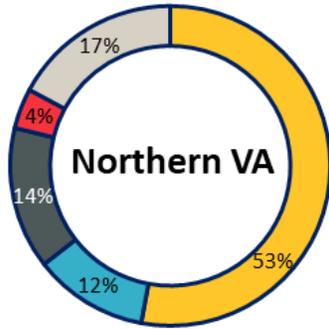
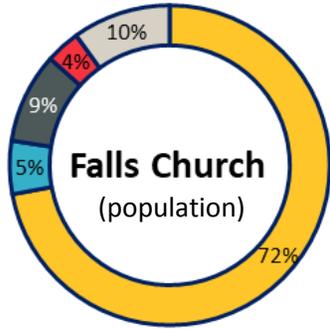
Along with McLean, the City of Falls Church has the largest share of non-Hispanic white residents. Nearly three out of every four residents in the City are non-Hispanic white (72.1%). By contrast, communities adjacent to the City of Falls Church are some of the most racially diverse in the region. Seven Corners, for example, has essentially the same proportion of Hispanic residents (31.4%) as white non-Hispanic residents (31.3%), as well as one of the largest shares of Asian residents in the region (26.2%).

Of the residents added to the City's population over the past 5 years, 58.1% are white and 41.9% are non-white. However, in the Northern Virginia region overall, the majority of the population growth has been among the non-white population. Of the new residents in the region over the past 5 years, about 77.3% are non-white and 22.7% are white. In addition, as of 2017, more than half of the population in Northern Virginia were non-white. Similar trends are occurring nationally. For example, between 2010 and 2017, the white population in the U.S. remained virtually unchanged (increasing by just 0.3%) while the non-white population increased 14.8%.



Source: U.S. Census Bureau, 5-Year American Community Survey (2012-2016 and 2007-2011)

Racial Composition of Population
2016



Source: U.S. Census Bureau, 5-Year American Community Survey (2012-2016)

Household Trends

This section assesses how the household composition in the City of Falls Church has changed and evaluates the types of households that have primarily driven growth in the City in recent years. This section examines trends in households with children and households comprised by individuals living alone, as well changes in household incomes. This section concludes with a review of the mix of housing units in the City.

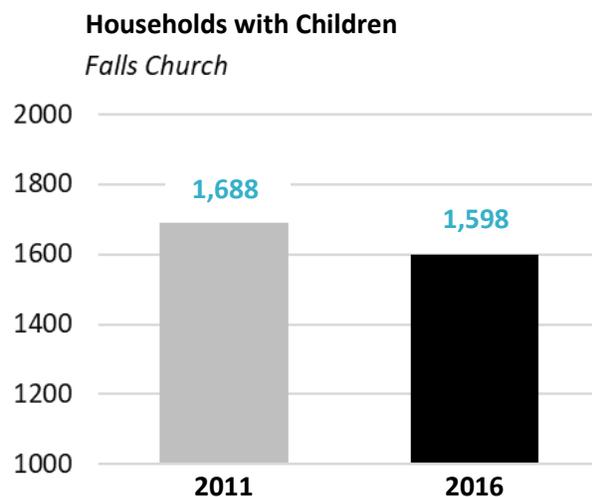
Households with Children

Households without children are driving household growth in the City of Falls Church. There were 5,301 households in the City in 2016, 10.3% more than 2011. As the number of households in the City has increased, the household composition has also changed. The overall number of households with children in the City actually declined by 5.3% between 2011 and 2016, reflecting the sharpest decline in Northern Virginia. Communities directly adjacent to Falls Church, by contrast, are experiencing an increase in the number of households with children. Seven Corners had the largest spike in the region with 45.5% more households with children than five years ago. Arlington County and the Idylwood neighborhood also had relatively steep growth in the number of households with children, rising 19.5% and 11.7% respectively.

As noted in the Population Trends section, Falls Church has seen an increase in school-age children, yet the number of households with children has declined. The data reflect a pattern of some households—namely home owners—having more children. Between 2011 and 2016 in Falls Church there was an increase in households with 3 or more children (20.4%), but a decline in households with 1 or 2 children (-9.8%).

During this same time period the City had an 18.7% increase in the number of households without children. Based on these trends, the household growth in the City of Falls Church has been driven not by households with children, but rather childless households, including couples and singles.

Households with Children	
<i>% Change 2011 to 2016</i>	
Seven Corners	+45.5%
Alexandria	+20.1%
Arlington	+19.5%
Idylwood	+11.7%
West Falls Church	+10.7%
McLean	+9.6%
Vienna	+9.1%
Pimmit Hills	+8.5%
Northern Virginia*	+7.7%
Herndon	-0.4%
Falls Church	-5.3%



Source: U.S. Census Bureau, 5-Year American Community Survey (2012-2016 and 2007-2011)

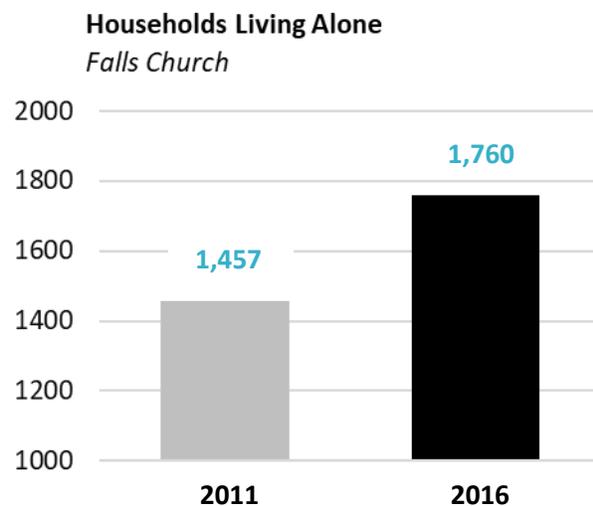
*Includes the cities of Falls Church, Fairfax, Alexandria, Manassas and Manassas Park; and the counties of Arlington, Fairfax, Loudoun and Prince William

Living Alone

Approximately one out of every three households in the City is someone living alone. The number of people living alone has increased significantly in Falls Church. There are 20.8% more households of people living alone than five years ago, which was the fastest increase in the region. Regionwide about one out of four households are people living alone.

Of those living alone in Falls Church, more than two-thirds are under the age of 65 (68.4%). Similar age compositions of single-person households exist in adjacent Seven Corners and West Falls Church. The growth in people living alone in Falls Church reflects both a diversifying housing stock in the City, delayed household formation within the millennial generation and an aging of the baby boomer population.

Households Living Alone % Change 2011 to 2016	
Falls Church	+20.8%
Arlington	+4.7%
Seven Corners	+2.3%
Northern Virginia*	+1.4%
Alexandria	-2.0%
Herndon	-6.0%
Idylwood	-12.0%
West Falls Church	-13.7%
McLean	-17.7%
Vienna	-23.6%
Pimmit Hills	-33.2%



Source: U.S. Census Bureau, 5-Year American Community Survey (2012-2016 and 2007-2011)

*Includes the cities of Falls Church, Fairfax, Alexandria, Manassas and Manassas Park; and the counties of Arlington, Fairfax, Loudoun and Prince William

Income

Falls Church has seen a surge in households that have incomes between \$50,000 and \$100,000.

Approximately 1 out of every 4 household in the City of Falls Church has a household income between \$50,000 and \$100,000. Of the City's 5,301 households, approximately 1,340 are in this income range, which is up from 928, reflecting a 44.4% increase over five years ago.

Falls Church is the only community in the region to have a surge in this income range, and most neighboring communities have had a decline. The increase in middle-income households is likely due to the rise in one-person households, rather than family households, as this income range is in line with a typical wage for Professional and Business Service jobs in the DC area. More than one in four Falls Church residents who work are employed in this sector.

The City of Falls Church remains one of the highest-income areas in the Northern Virginia region. Approximately four out of every 10 households in the city has an annual income of \$150,000 or more. In the Northern Virginia region, McLean has the highest proportion in this income range with six out of 10 households having incomes of \$150,000 or more annually. Seven Corners has the lowest proportion with about one out of every 10 households earning \$150,000 or more each year.

Household Income \$150K+		Household Income \$50K-\$100K	
<i>Proportion of all households 2016</i>		<i>% Change 2011 to 2016</i>	
McLean	62.0%	Falls Church	+44.4%
Vienna	47.9%	Seven Corners	+3.4%
Falls Church	39.5%	Idylwood	+0.3%
Arlington	34.2%	Alexandria	-0.3%
Pimmit Hills	34.0%	Northern Virginia*	-1.7%
Northern Virginia*	33.2%	Arlington	-6.6%
Idylwood	27.4%	Herndon	-9.4%
West Falls Church	27.2%	West Falls Church	-12.2%
Herndon	26.2%	Pimmit Hills	-14.2%
Alexandria	24.9%	McLean	-15.5%
Seven Corners	11.2%	Vienna	-20.8%

Source: U.S. Census Bureau, 5-Year American Community Survey (2012-2016 and 2007-2011)

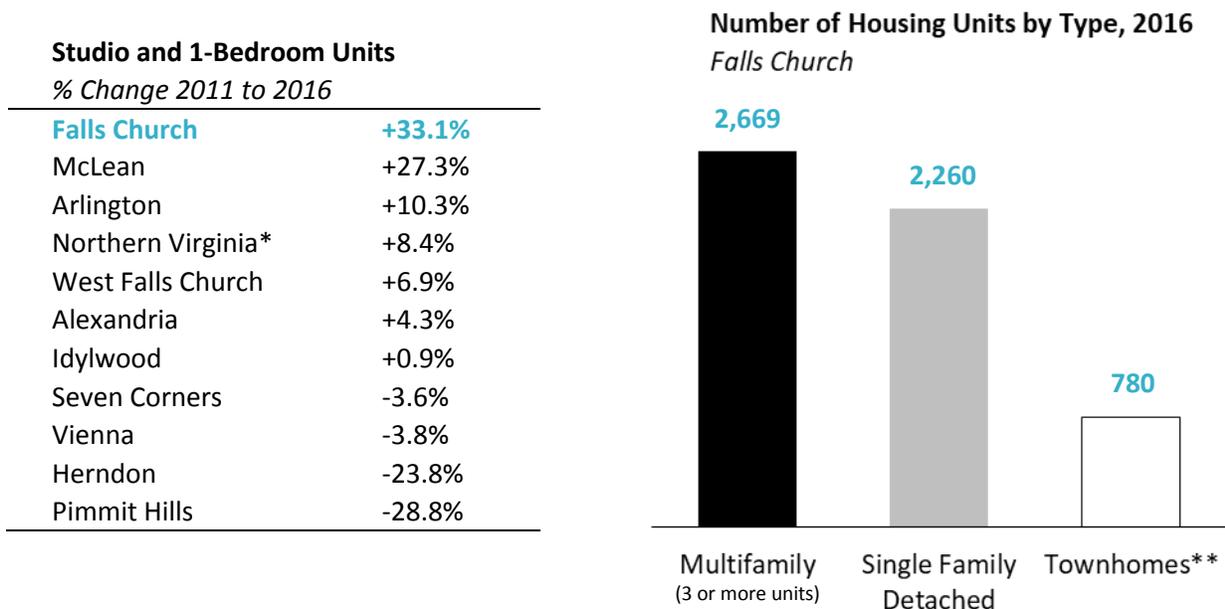
*Includes the cities of Falls Church, Fairfax, Alexandria, Manassas and Manassas Park; and the counties of Arlington, Fairfax, Loudoun and Prince William

Unit Types

Falls Church has seen an increase in the stock of multifamily housing, specifically studios and 1-bedroom units. Over the past five years, Falls Church has had a 15.5% increase in multifamily housing units (defined as 3 or more units in a building), which is the fastest increase in Northern Virginia. Arlington and Alexandria, which also have a large stock of multifamily housing had increases of 8.8% and 9.0% respectively during the same time period.

Single-family detached housing remains a large segment of the City's housing stock, but as of 2016 the data suggests there are now more multi-family units than single-family detached units in the City.

New housing units in the City of Falls Church are also smaller. Nearly 1 out of every 3 housing units in the City are studios and 1-bedroom units (30.4%). Over the past five years, the stock of studios and 1-bedroom units in the City has jumped 33.1%.



Source: U.S. Census Bureau, 5-Year American Community Survey (2012-2016 and 2007-2011)

*Includes the cities of Falls Church, Fairfax, Alexandria, Manassas and Manassas Park; and the counties of Arlington, Fairfax, Loudoun and Prince William

**Includes duplexes and other (RV, mobile home, boat, etc.)

Employment Trends

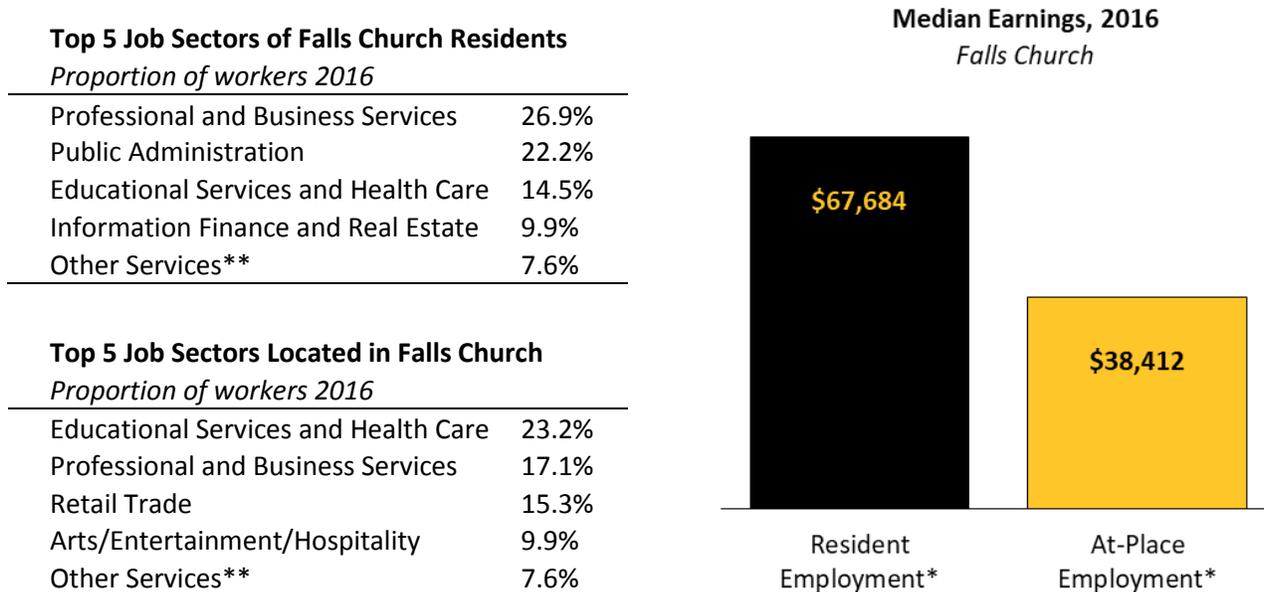
This section describes the characteristics of resident workers (i.e. City of Falls Church residents who are employed) and at-place workers (i.e. jobs located in the City of Falls Church). In addition, this section analyzes the commuting patterns both for resident workers and at-place workers.

Types of Jobs

There are two job sectors that employ nearly half of all Falls Church employed residents. About 50% of Falls Church resident workers are employed in either the Public Administration or Professional and Business Services Sectors. The other half work in a variety of sectors primarily Education Services, Health Care, and Information, Finance, Insurance, and Real Estate services sectors. Less than 1% of Falls Church resident workers are in the Armed Forces. The median annual wage of employed Falls Church residents is \$67,684.

About one out of every four jobs located in Falls Church are in retail and hospitality-related sectors. Approximately 25.7% of all jobs in Falls Church are in the Retail Trade or Arts, Entertainment, and Accommodation/Food Services sectors. Another quarter (23.2%) of jobs located in the City are Education and Health Care sector jobs. Compared to the overall Northern Virginia region, the Falls Church economy is disproportionately concentrated in Retail Trade and Education and Health Care sector jobs. Jobs in these resident-serving sectors tend to have lower wages than jobs in the Professional and Business services and in most other sectors. The median annual wage of Falls Church jobs is \$38,412, notably lower than the wages of employed residents.

Since 2010, the City of Falls Church has added significant numbers of jobs in the Education, Health Care and Arts, Entertainment and Recreation sectors. Despite the growth in these sectors, the total number of jobs in the City has remained relatively flat, declining 0.4% or 306 jobs since 2010.



Source: U.S. Census Bureau, 5-Year American Community Survey, Tables S0802, S0804. Notes will differ from VEC data.

*Resident employment refers to the industries of working City of Falls Church residents. At-place employment refers to jobs located within Falls Church.

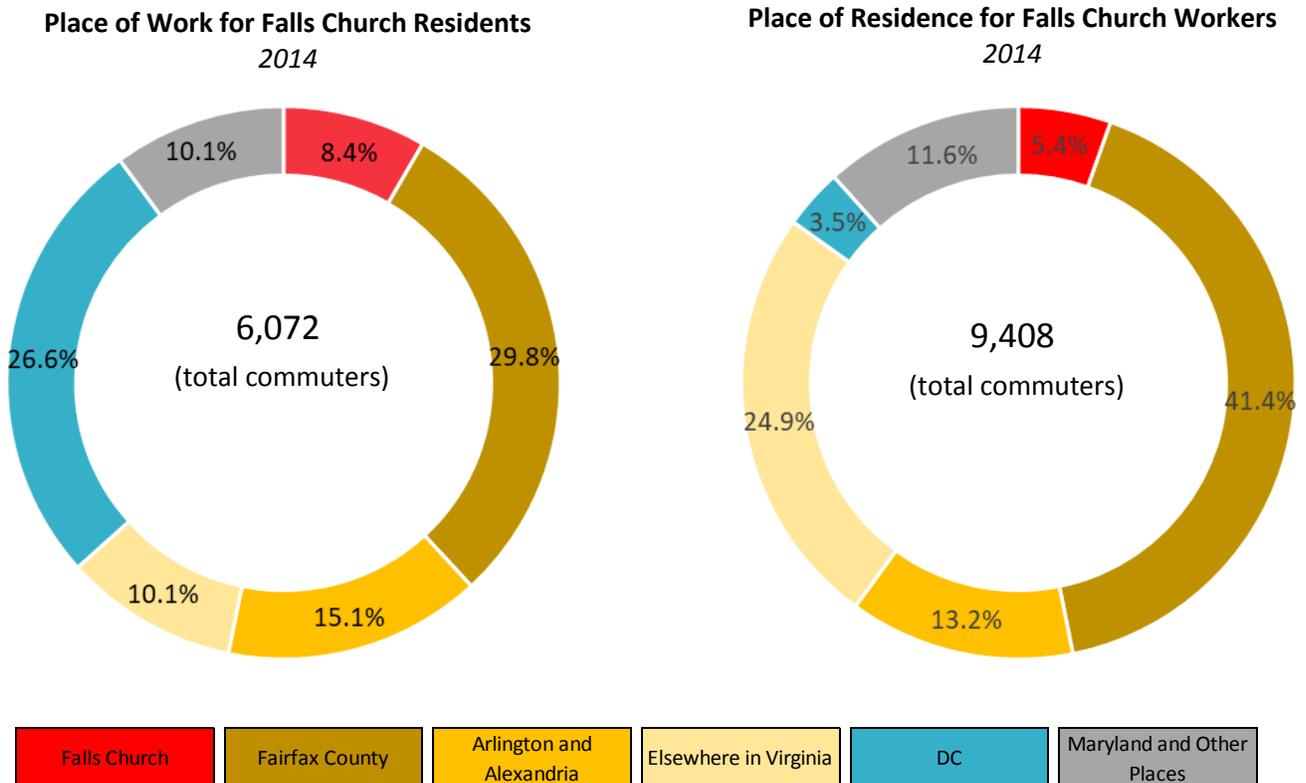
**The Other Services sector includes jobs such as (but not limited to) dry cleaning/laundry, personal care, death care, pet care, parking, machinery repair

Commuting

About three out of every 10 Falls Church residents who work have jobs in Fairfax County. As of 2014, there were approximately 6,072 resident workers in Falls Church. Of those workers, 1,807 (29.8%) had jobs located in Fairfax County. The next largest share (26.6%) have jobs in DC. Only 8.4% of resident workers both live and work in the City of Falls Church.

Most of the City’s resident workers commute by car alone (59.6%), though about one out of four take public transit, walk, or bike (24.8%), which is the one of the highest proportions in the region behind Arlington (32.7%) and Alexandria (26.9%). Another 7.4% of resident workers carpool and 7.1% work from home.

The largest share of jobs in the City of Falls Church are held by Fairfax County residents. While a plurality of Falls Church jobs are held by workers who commute into the City from neighboring Fairfax County (41.4%) it is notable that nearly a tenth (9.7%) of the City’s jobs are held by commuters from Maryland. Nearly three out of every four workers employed in Falls Church drive to work alone in a car (72.8%). This is a lower share than Vienna (79.6) and McLean (77.3%), but higher than neighboring Seven Corners (65.2%), Idylwood (64.3%) and Arlington (56.4%).



Source: U.S. Census Bureau, Virginia Employment Commission

Conclusion

The City of Falls Church is a great place to live. In recent years, the has been experiencing significant changes to its population demographics and housing stock. According to the U.S. Census Bureau's latest population estimates, the City's population increased by 18.3 percent between 2010 and 2017, or about 2.6 percent annually. While the overall number of jobs in the City has remained relatively unchanged, Falls Church has experienced important growth in the Education and Health Care sectors.

Key takeaways from this analysis of demographic trends in the City of Falls Church include the following:

Childless Households. Families have long been attracted to the City because of its high-quality schools and welcoming neighborhoods. The City of Falls Church continues to be attractive to families, but the number of households with children in the City has actually been on the decline. The City's growth in recent years has been primarily driven by people living alone and renters without children.

Multifamily and Rental Housing. The City's changing housing stock is reflected in the change in the household composition. Growth in the number of multifamily units, and specifically the number of studio and one-bedroom units, is the reason for that childless households have been a key driver of growth in the City.

Racial and Ethnic Minorities. The City's population is becoming more racially and ethnically diverse; however, the white population comprises a larger share of the City's population than it does in other Northern Virginia communities.

Jobs and Workforce. The City has a disproportionately higher share of jobs in resident-serving industries including Retail Trade and Education and Health Services. City residents, however, are much more likely to be employed in Public Administration or Professional/Technical Services jobs.

Looking Ahead

As the population has grown and the economy has evolved, the demographic composition of the City's residents and characteristics of the housing stock are also changing. The City's growth and change is happening in the context of broader economic and demographic change in Northern Virginia and the Washington DC region. As a relatively small community in a large regional economy and housing market, the City will be impacted by changes in job growth, transportation investments and housing demand which are outside of local control.

These macro trends, along with the factors unique to the City, will be key drivers of future population, household and job growth. Next steps in assessing demographics in the City of Falls Church will include a range of city-level population, household, housing unit and employment projections through 2040 in 5-year increments. These forecasts will include projections using a housing-based model (i.e. the same approach currently being used) with updated assumptions about housing turnover, housing occupancy and household composition by housing type. In addition, alternative demographic projections will be prepared that will provide a range of potential forecasts.

The demographic data compiled in this report and produced as part of the forecasting process should be used to guide planning and policy decisions in the City. In particular, the analysis of current trends and

forecasts will be important for examining how demographic trends and patterns in the City of Falls Church are related to other issues, including but not limited to:

- Housing mix (including the potentially changing relationship between life cycle and housing preferences/housing demand)
- Public services and facilities (including schools, parks, public safety, as well as group homes, independent living for seniors and other types of facilities)
- City employment and economic development (including potential demand for retail and resident-serving businesses)
- This comprehensive demographic analysis will be the key input to the update of the Demographics chapter of the City's Comprehensive Plan.

