



# Consultant Team



- Demographic analysis and forecasting
- Housing market analysis
- Land use planning
- Regional and local economic analysis



Lisa Sturtevant, PhD – President

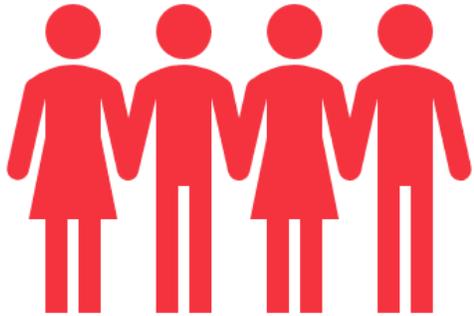


Ryan Price – Senior Associate



David Huaman – Research Assistant

# Topics



Population  
Trends



Household  
Trends



Workforce  
Trends

# Drivers of Population Growth & Change

Births  
Deaths



Natural Increase

In-migration  
Out-migration



Net Migration

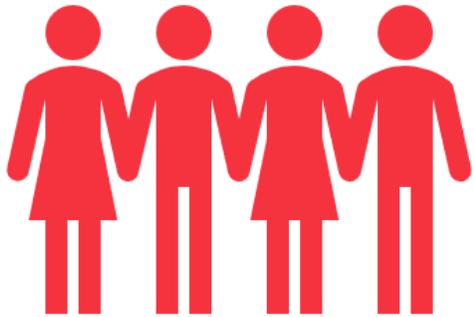
# Drivers of Population Growth & Change

## City of Falls Church population change, 2016-2017

Geography	Annual Estimates of the Components of Population Change						
	July 1, 2016 to July 1, 2017						
	Total Population Change [1]	Natural Increase	Vital Events		Net Migration		
			Births	Deaths	Total	International [2]	Domestic
Falls Church city, Virginia	715	138	218	80	575	83	492

Source: U.S. Census Bureau

# Topics



Population  
Trends



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# Population Trends

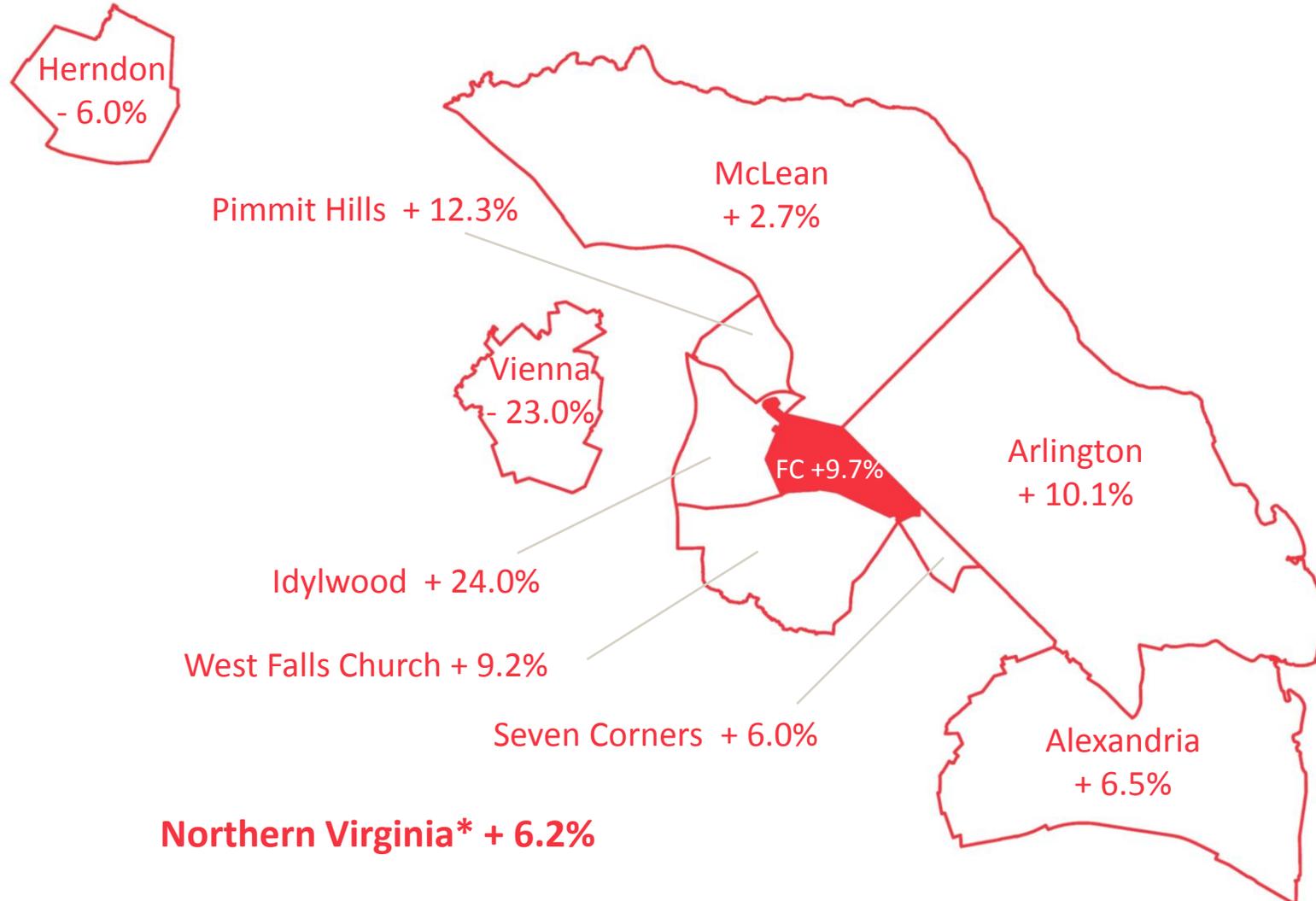
## Millennials



- Falls Church has seen similar growth in Millennial age population as other inside the Beltway communities
- Fastest Millennial population growth is occurring in adjacent Idylwood and Pemit Hills
- As of 2017, about 1 out of 8 Falls Church residents were Millennials (in Northern Virginia its about 1 out of 7).



## Change in Millennial Age Population 2011-2016 (5yr % change)



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

# Population Trends

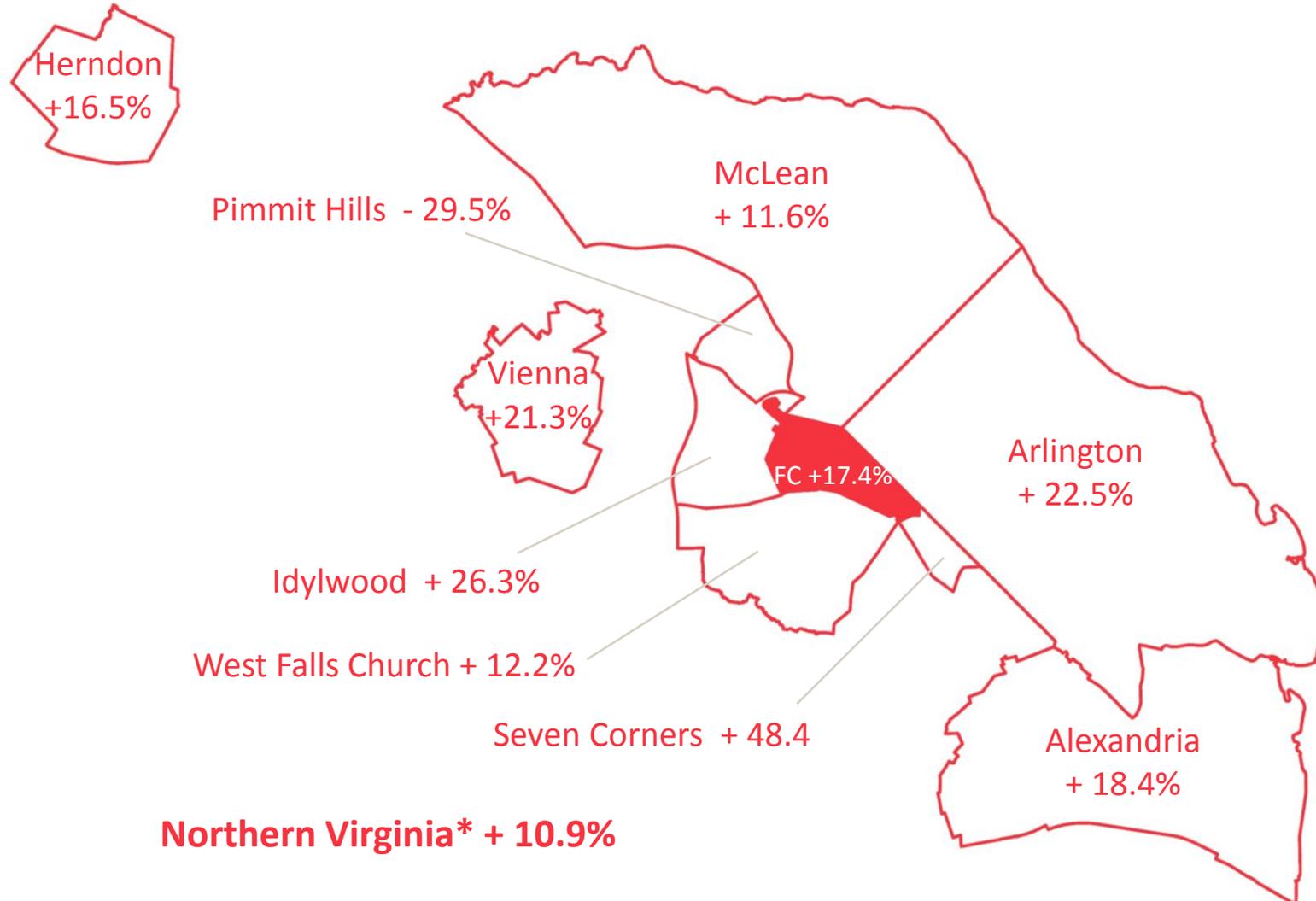
## School Age



- *The school age population in Falls Church is growing at a faster rate than the region as a whole, but slower than several adjacent communities.*
- *The sharpest growth in the school age population is occurring in neighboring Seven Corners, Idylwood, and Arlington*
- *Nearly 1 out of every 5 Falls Church residents are school age (5-17 years old).*



## Change in School Age Population 2011-2016 (5yr % change)



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

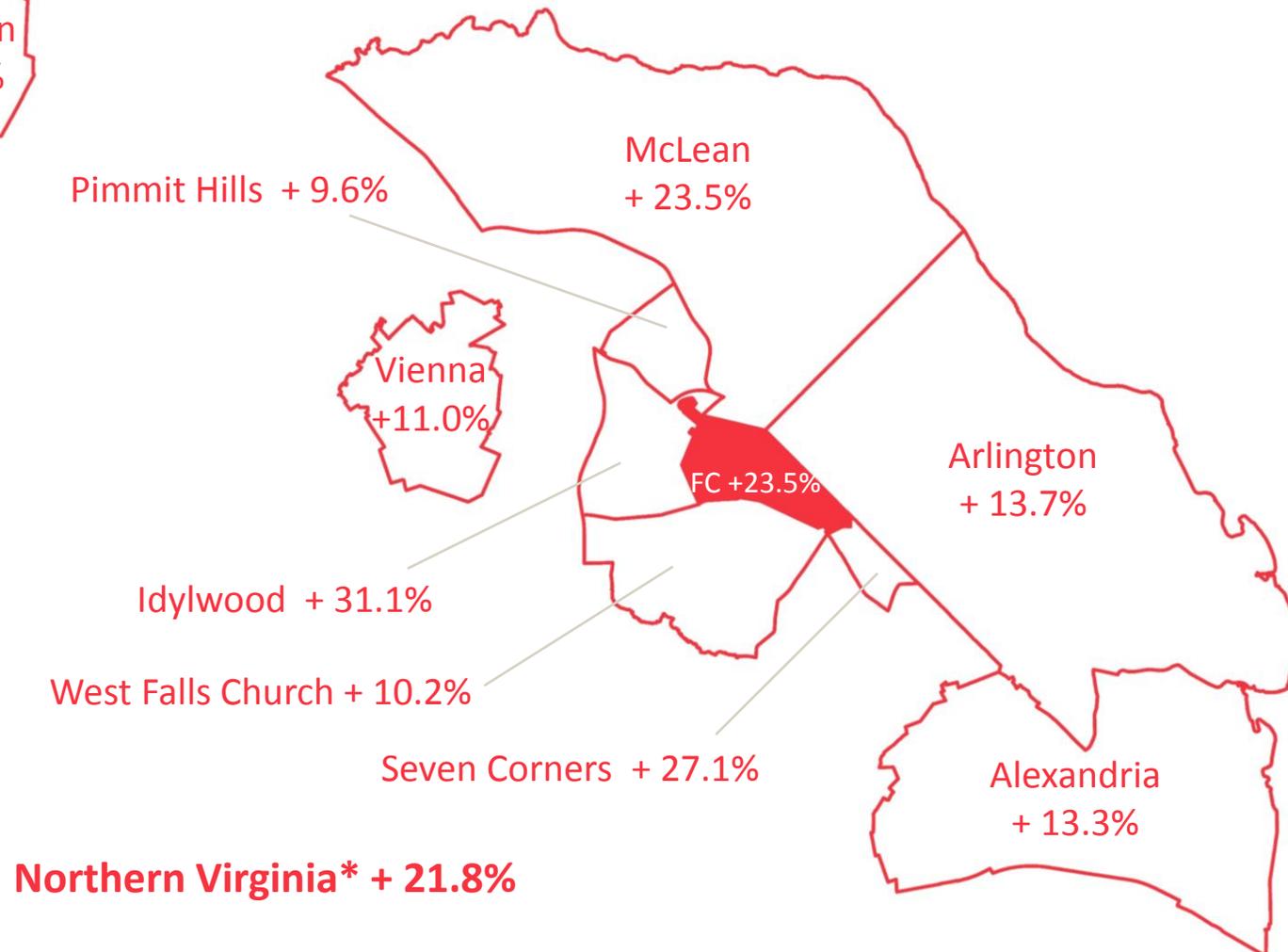
# Population Trends

## Older Adults (55+)

- *The age segment of adults at 55 and older is growing rapidly in Northern Virginia*
- *About 1 out of 4 Falls Church residents are age 55 and older, which is similar to regional trends.*



## Change in School Age Population 2011-2016 (5yr % change)



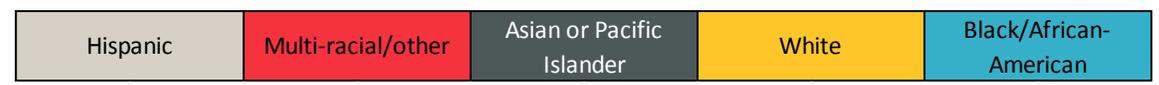
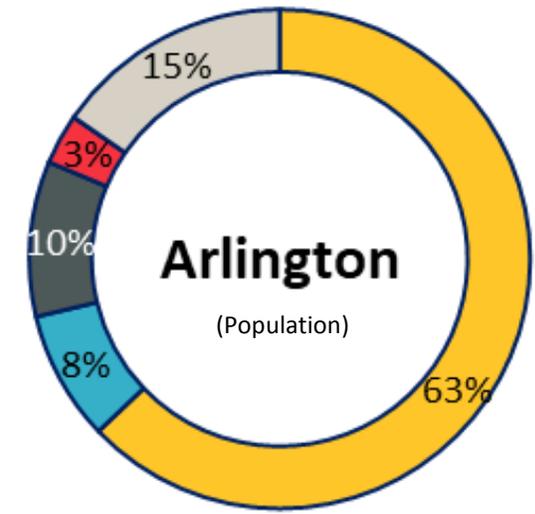
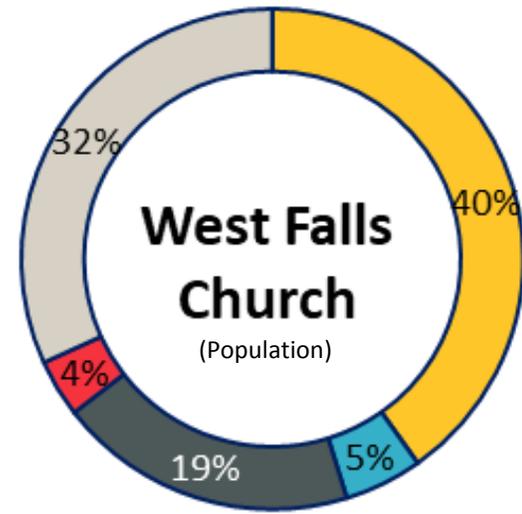
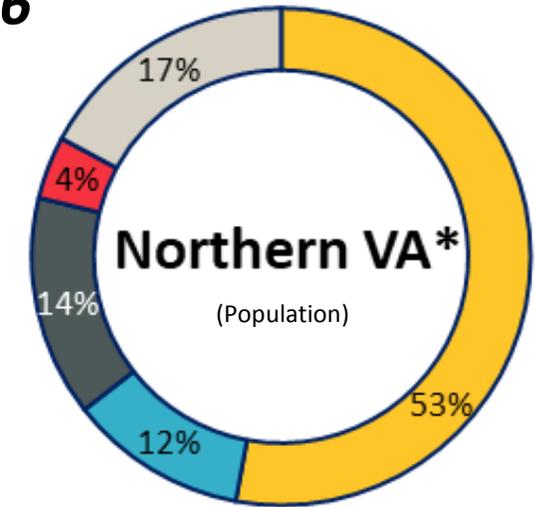
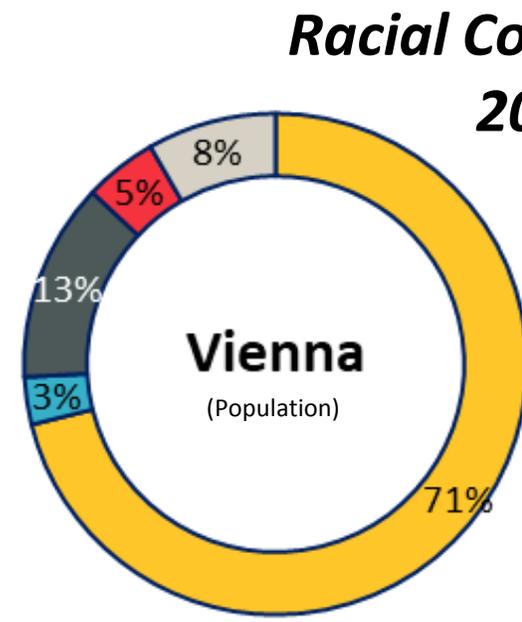
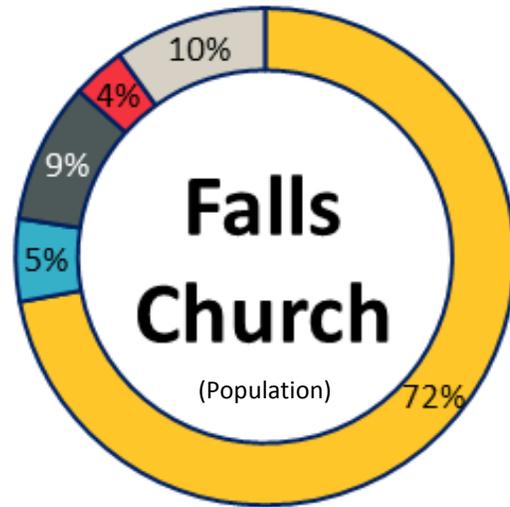
Source: U.S. Census Bureau, 5-Year American Community Survey (2012-2016 and 2007-2011)

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

# Population Trends

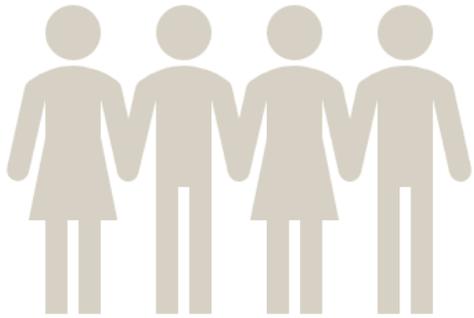
## Racial Diversity

- Falls Church is one of the least racially diverse communities in Northern Virginia
- Similar racial composition exists in Vienna and McLean
- The data shows the City is becoming more diverse, but slower than the Northern Virginia Region



Source: U.S. Census Bureau, 5-Year American Community Survey (2012-2016)  
 \*Includes the cities of Falls Church, Fairfax, Alexandria, Manassas and Manassas Park; and the counties of Arlington, Fairfax, Loudoun and Prince William

# Topics



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Household  
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Workforce  
Trends

# Household Trends



## Households with children



- Falls Church has more households than 5 years ago, but fewer of them have children
- Overall household growth in the City was 10.3% over the past 5 years, however households with children declined 5.3% during the same time period
- Communities directly adjacent to Falls Church however are experiencing an increase in households with children

### Households with Children % Change 2011 to 2016

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%
<b>Falls Church</b>	<b>-5.3%</b>

### Households with Children Proportion, all households, 2016

Vienna	42.7%
McLean	39.5%
Northern Virginia*	34.7%
Herndon	34.6%
Pimmit Hills	32.8%
West Falls Church	31.5%
Idylwood	30.2%
<b>Falls Church</b>	<b>30.1%</b>
Seven Corners	24.0%
Alexandria	21.4%
Arlington	21.0%

# Household Trends

## *Households living alone*

- *The number of households with people living alone in Falls Church increased 20.8% between 2011 and 2016, the fastest increase in the region for this household type*
- *Nearly 1 out of every 4 households in the City is someone living alone under the age of 65*

### **Households Living Alone** *% Change 2011 to 2016*

<b>Falls Church</b>	<b>+20.8%</b>
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%

### **Households Living Alone** *Proportion, all households, 2016*

Seven Corners	45.6%
Alexandria	41.6%
Arlington	39.1%
<b>Falls Church</b>	<b>33.2%</b>
Idylwood	25.6%
Northern Virginia*	24.5%
Herndon	23.4%
West Falls Church	22.6%
Pimmit Hills	16.8%
McLean	16.8%
Vienna	15.7%

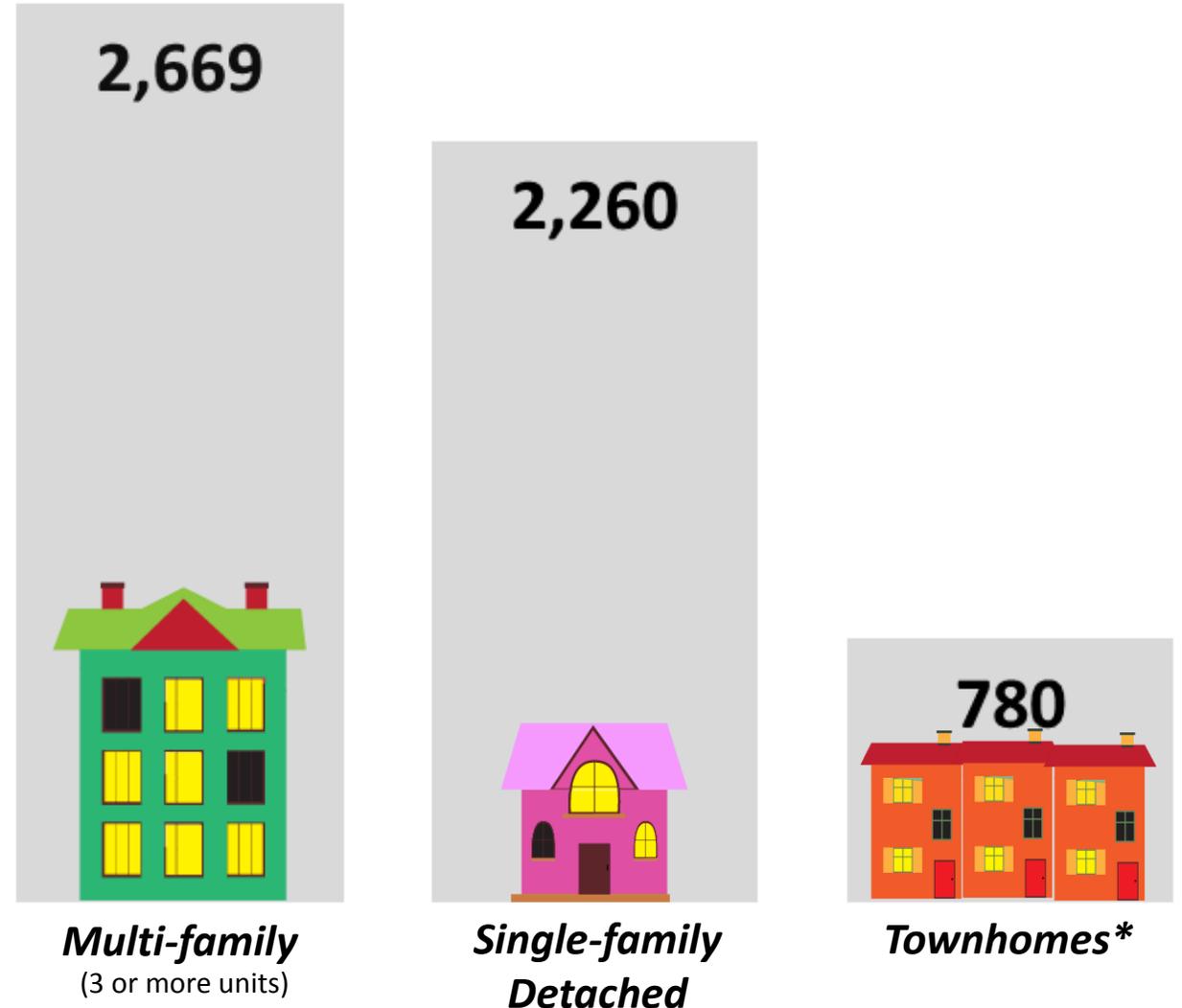
# Housing Trends



## Unit Types

- *Single-family detached remains a large segment of the City's housing stock, but the share of multi-family units has been rising sharply in recent years*
- *The data shows there are now more multi-family units in the City than single-family detached units, which was not the case 5 years prior*

*Number of Housing Units by Type, 2016  
Falls Church, VA*



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

\*Includes Duplexes and Other (RV, mobile home, boat, etc.)

# Household Trends

## Income

- Falls Church remains one of the high-income areas in the Northern Virginia Region, with approximately 4 out every 10 households making \$150K or more annually
- The City has seen a surge in the number of households making between \$50K-\$100K over the past 5 years

### Household Income \$150K+

Proportion of all households 2016

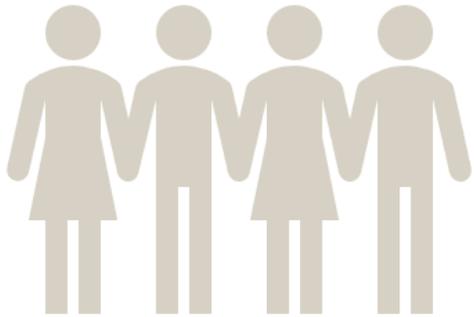
McLean	62.0%
Vienna	47.9%
<b>Falls Church</b>	<b>39.5%</b>
Arlington	34.2%
Pimmit Hills	34.0%
Northern Virginia*	33.2%
Idylwood	27.4%
West Falls Church	27.2%
Herndon	26.2%
Alexandria	24.9%
Seven Corners	11.2%

### Household Income \$50K-\$100K

% Change 2011 to 2016

<b>Falls Church</b>	<b>+44.4%</b>
Seven Corners	+3.4%
Idylwood	+0.3%
Alexandria	-0.3%
Northern Virginia*	-1.7%
Arlington	-6.6%
Herndon	-9.4%
West Falls Church	-12.2%
Pimmit Hills	-14.2%
McLean	-15.5%
Vienna	-20.8%

# Topics



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# Workforce Trends

## *Types of Jobs*

- *Nearly half of all employed Falls Church residents work in the Public Administration or Business and Professional Services sectors*
- *About 1 out of every 4 jobs located in Falls Church are in retail and hospitality-related sectors. Another quarter (23.2%) of jobs located in the City are Education and Health Care sector jobs. These three job sectors have been growing around the region.*



### ***Top 5 Job Sectors of Falls Church Residents***

*Proportion of workers 2016*

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Professional and Business Services	26.9%
Public Administration	22.2%
Education Services and Health Care	14.5%
Information Finance and Real Estate	9.9%
Other Services	7.6%

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### ***Top 5 Job Sectors Located in Falls Church***

*Proportion of workers 2016*

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Educational Services and Health Care	23.2%
Professional and Business Services	17.1%
Retail Trade	15.3%
Arts/Entertainment/Hospitality	10.4%
Other Services	9.0%

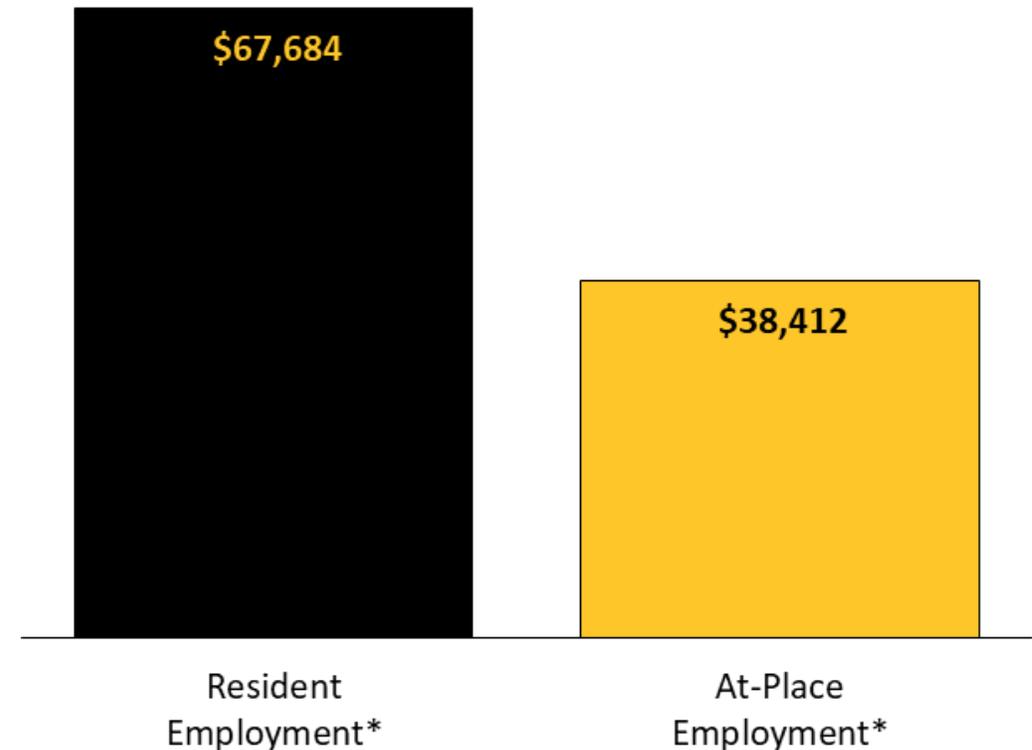
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# Workforce Trends

## Earnings

- *The retail and hospitality-related job sectors which account for a quarter of Falls Church jobs tend to have lower paying wages than other sectors.*
- *The median earnings for Falls Church residents that work is approximately \$30,000 higher than workers in jobs located in Falls Church.*

Median Earnings, 2016  
Falls Church



Source: U.S. Census Bureau, 5-Year American Community Survey, Tables S0802, S0804.

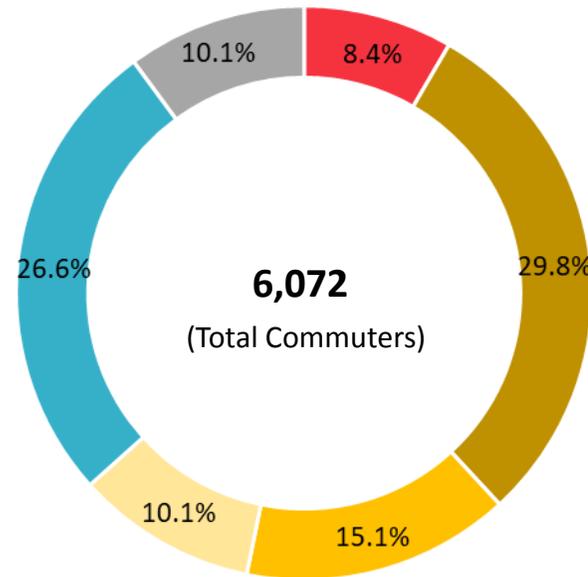
\*Resident employment refers to the industries of working City of Falls Church residents. At-place employment refers to jobs located within the City of Falls Church.

# Workforce Trends

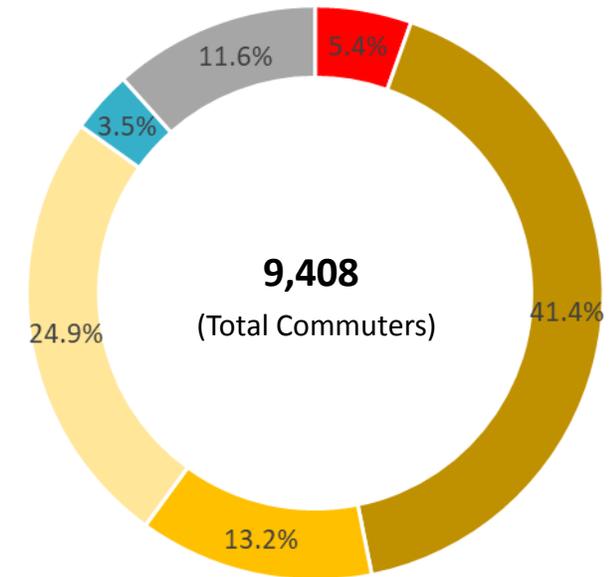
## Commuting

- *Nearly 30% of Falls Church residents who work, have jobs in Fairfax County. The next largest share are workers with jobs in DC (26.6%)*
- *More than 40% of Falls Church jobs are help by people who commute in from Fairfax County.*
- *Nearly 12% of Falls Church jobs are filled by someone who lives in Maryland or other places outside of VA and DC.*

**Place of Work**  
Falls Church Residents  
2014



**Place of Residence**  
Falls Church Workers  
2014



# Next Steps

- Demographic Projections
  - 3 scenarios
- Connections between Demographics and Other Issues
  - Housing mix
  - Public services and facilities
  - Employment and economic development
- Demographics Chapter of Comprehensive Plan

