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Source: FC News Press, photo by: Drew Costley

People & Jobs: Forecasts for Falls Church, Virginia



Topics



Trends

Projections

Connections

Discussion

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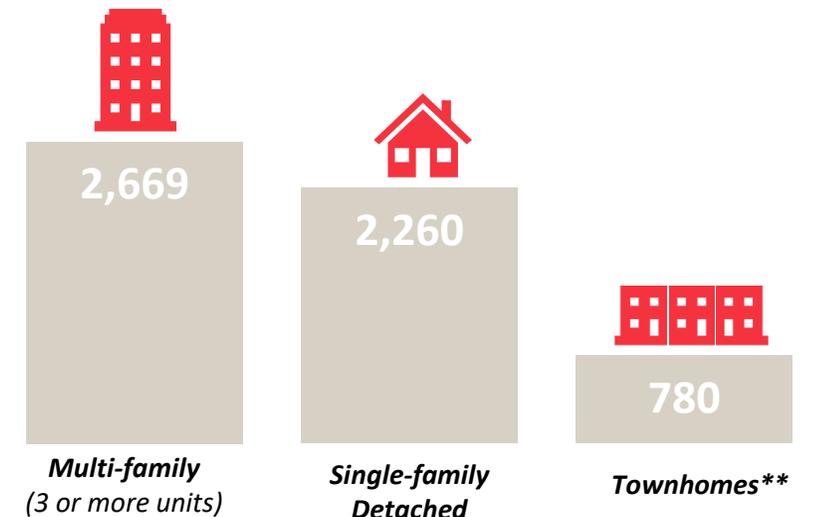
Housing Trends



- › Single-family detached remains a large segment of the City’s housing stock, but the share of multi-family units has been rising 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
- › New housing units in the City of Falls Church tend to be small. Nearly 1 out of every 3 housing units in the City are studios and 1-bedroom units

Studio and 1-Bedroom Units	
% Change 2011 to 2016	
Falls Church	+33.1%
McLean	+27.3%
Arlington	+10.3%
Northern Virginia*	+8.4%
West Falls Church	+6.9%
Alexandria	+4.3%
Idylwood	+0.9%
Seven Corners	-3.6%
Vienna	-3.8%
Herndon	-23.8%
Pimmit Hills	-28.8%

*Housing Units by Type
Falls Church, 2016*



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

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

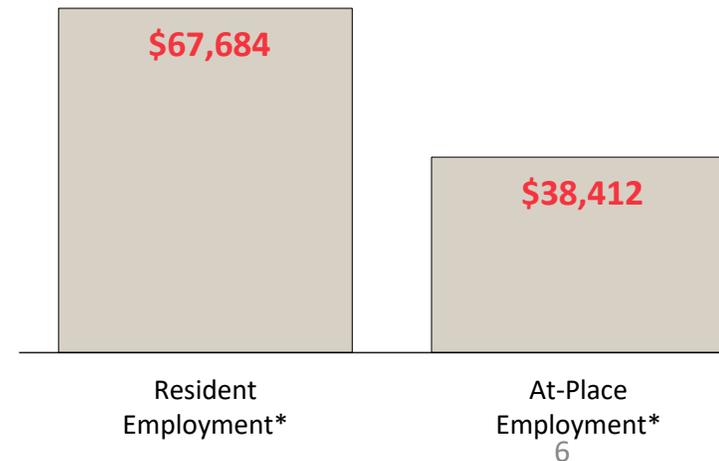
Workforce Trends

- › **Many Falls Church residents have jobs in high-paying industries.** Nearly half of all employed Falls Church residents work in the Public Administration or Business and Professional Services sectors
- › **Many of the jobs located in Falls Church are in lower-paying industries.** About 1 out of every 4 jobs located in Falls Church are in retail and hospitality-related sectors.
- › **Most Falls Church residents who work commute to Fairfax County or DC.** About 8% both live and work in Falls Church.
- › **Most Falls Church jobs are filled by Fairfax County residents.** Nearly 12% of Falls Church jobs are filled by someone who lives in Maryland or other places outside of VA and DC.

1 out of 4 jobs in Falls Church is in retail/hospitality sectors



Median Earnings
Falls Church, 2016



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Projections - Methodology

- I. Development-Based Method (Falls Church/MWCOG)
 - › Households, Population, Employment
 - › Proposed/anticipate residential and commercial development
 - › Assumptions about vacancy rates, average household sizes and space per worker

- II. Growth Rate/Extrapolation/Hamilton-Perry Method (Weldon Cooper Center/Falls Church Schools)
 - › Population only (by age group and race/ethnicity)
 - › Past population growth rates controlled to statewide totals

- III. Regional Method/Demand-Based Approach (GMU/MWCOG)
 - › Households only (by renter/owner, income level)

I. Development-Based Projections

New Housing Units, Households and Population

STEP 1. Estimate net new housing units

STEP 2. Estimate net new households by applying vacancy rates

STEP 3a. Estimate net new household population by applying average household sizes

STEP 3b. Estimate net population change in existing single-family homes based on assumptions about changes in average household sizes

STEP 3c. Estimate net population change in group quarters facilities

STEP 3d. Add population change from steps 3a, 3b and 3c

Add incremental changes to 2010 housing units, households and populations reported by the 2010 Census.

I. Development-Based Projections

New Employment

STEP 4. Estimate net new commercial space

STEP 5a. Estimate net new jobs associated with new commercial development using assumptions based on square footage per employee

STEP 5b. Estimate job gains/losses at existing businesses that result from projected economic recessions/expansions

STEP 5c. Add employment change from steps 5a and 5b

Add incremental changes to 2010 employment reported by the City.

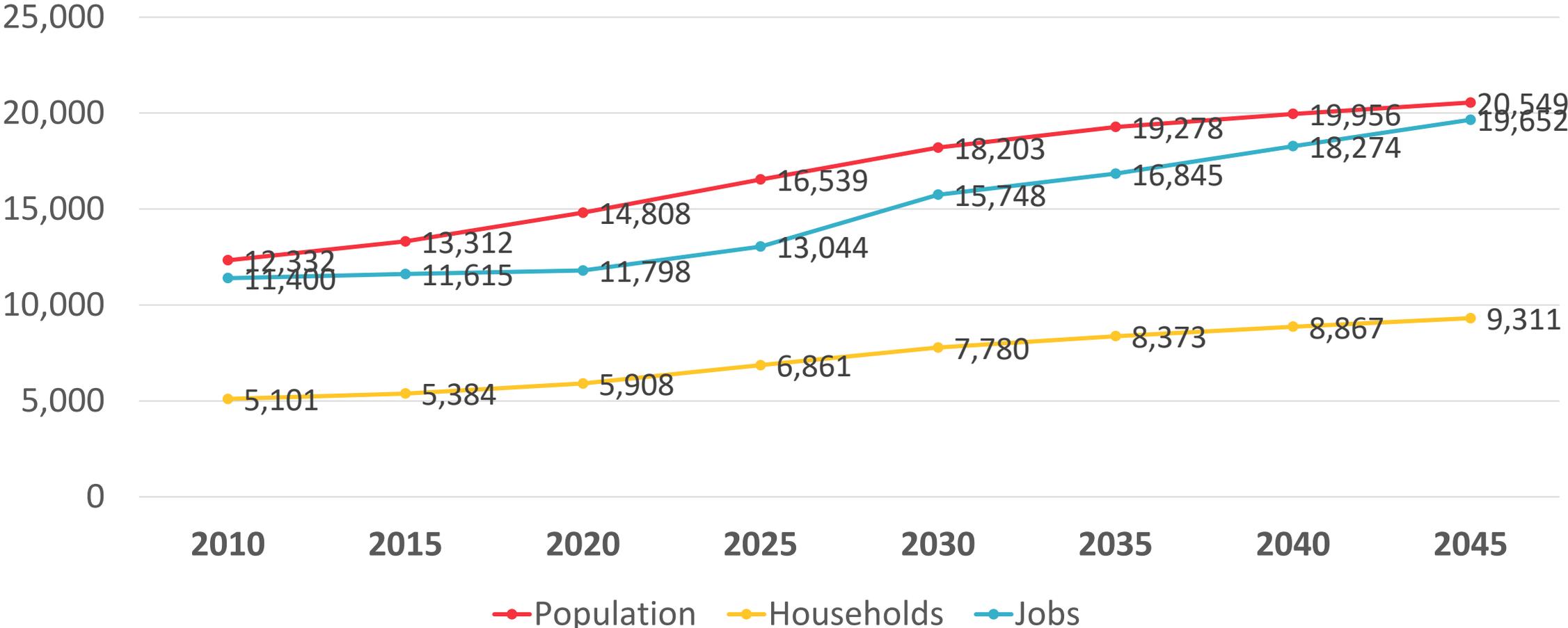
I. Development-Based Projections

Key Assumptions

Vacancy rates:	2.5% (SFD and apartments), 1.5% (condos and senior)
Avg households sizes:	1.59 (apartments), 1.81 (condos), 1.2 (senior), 1.85 (rental townhome) 2.5 to 2.75 (SFD – varies over time)
Employees per 1,000 sf of commercial space:	5 (office), 1.33 (retail), 1 (other), 0.25 (per hotel room)

I. Development-Based Projections

City of Falls Church Projections, 2010 to 2045

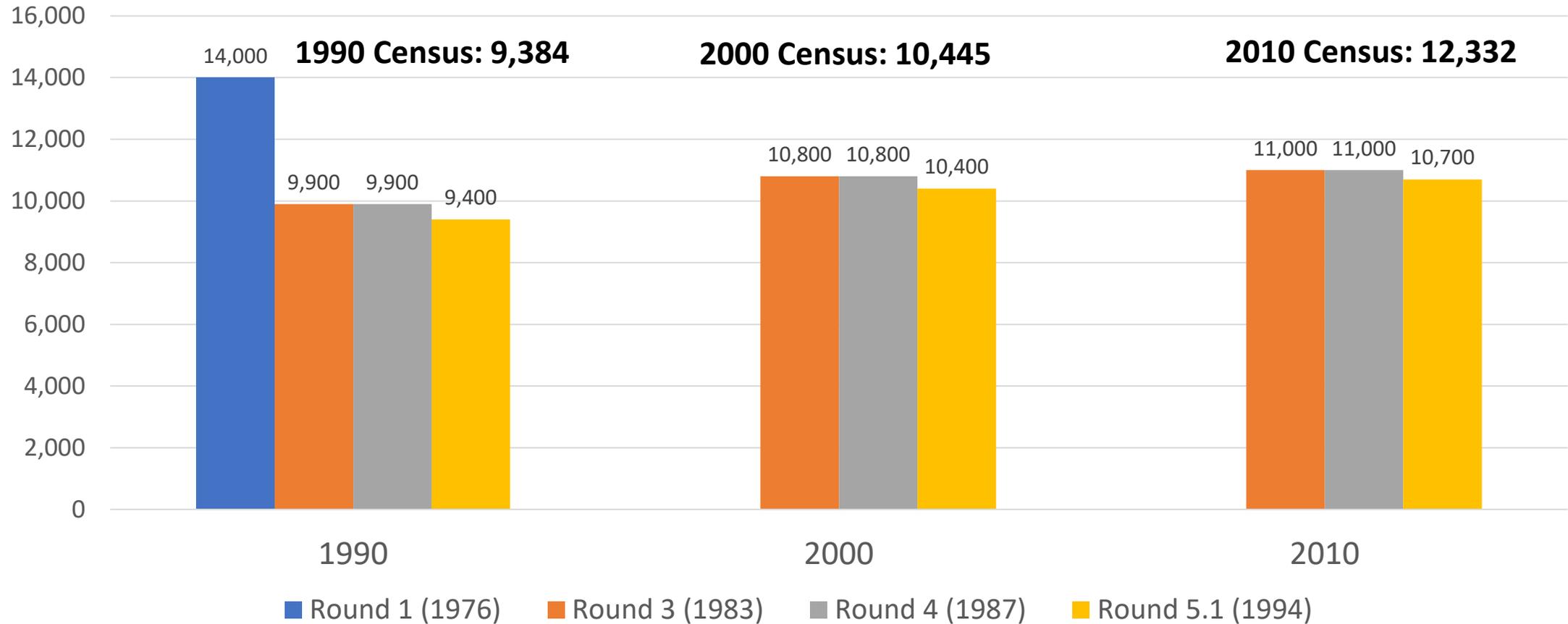


Source: LSA, City of Falls Church

I. Development-Based Projections

(Prior MWCOG Forecasts Compared to Census Data)

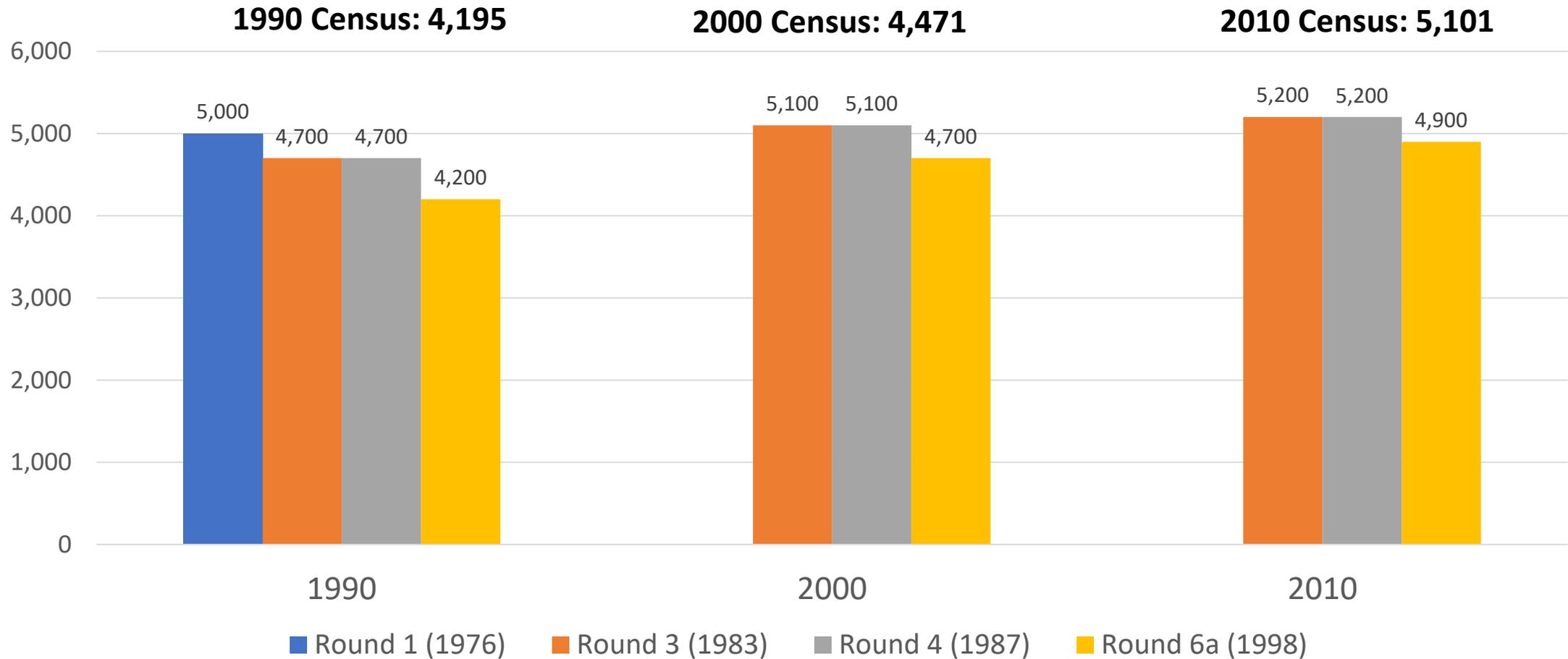
Population



I. Development-Based Projections

(Prior MWCOG Forecasts Compared to Census Data)

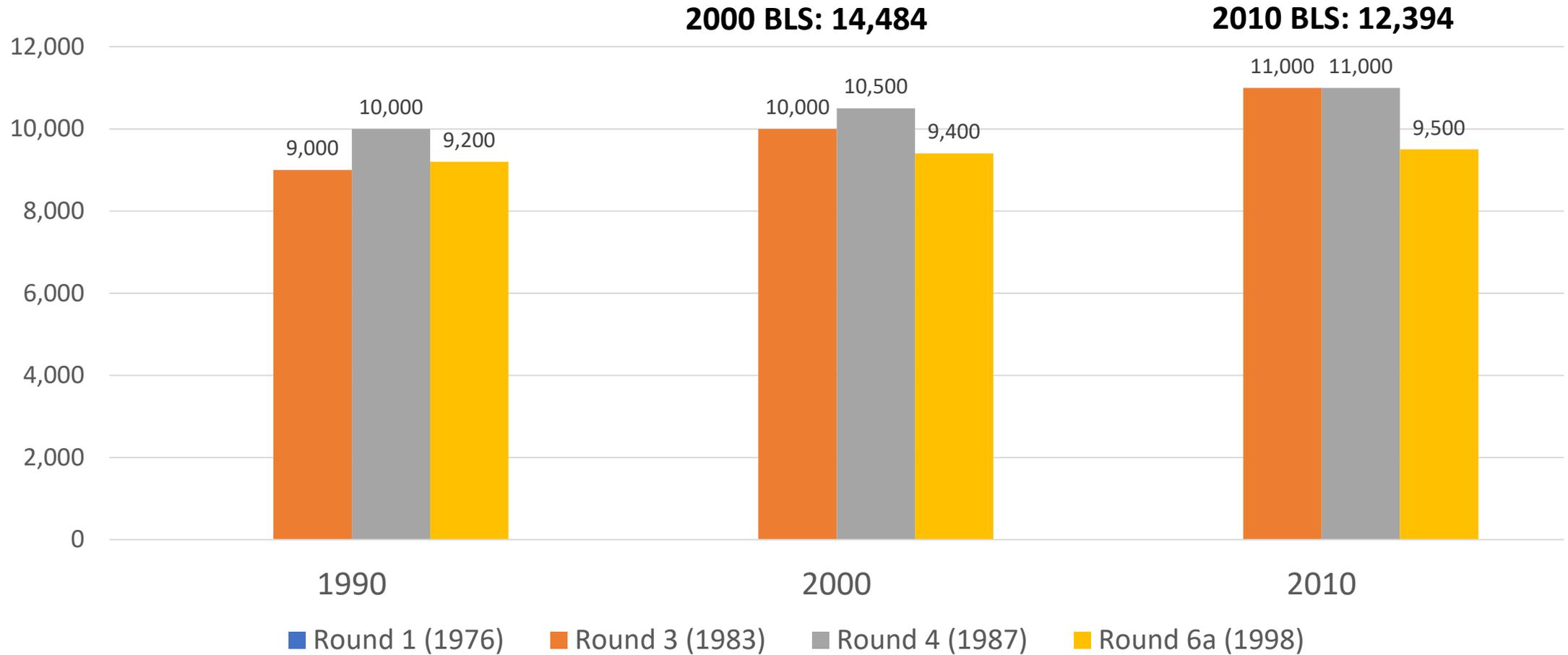
Households



I. Development-Based Projections

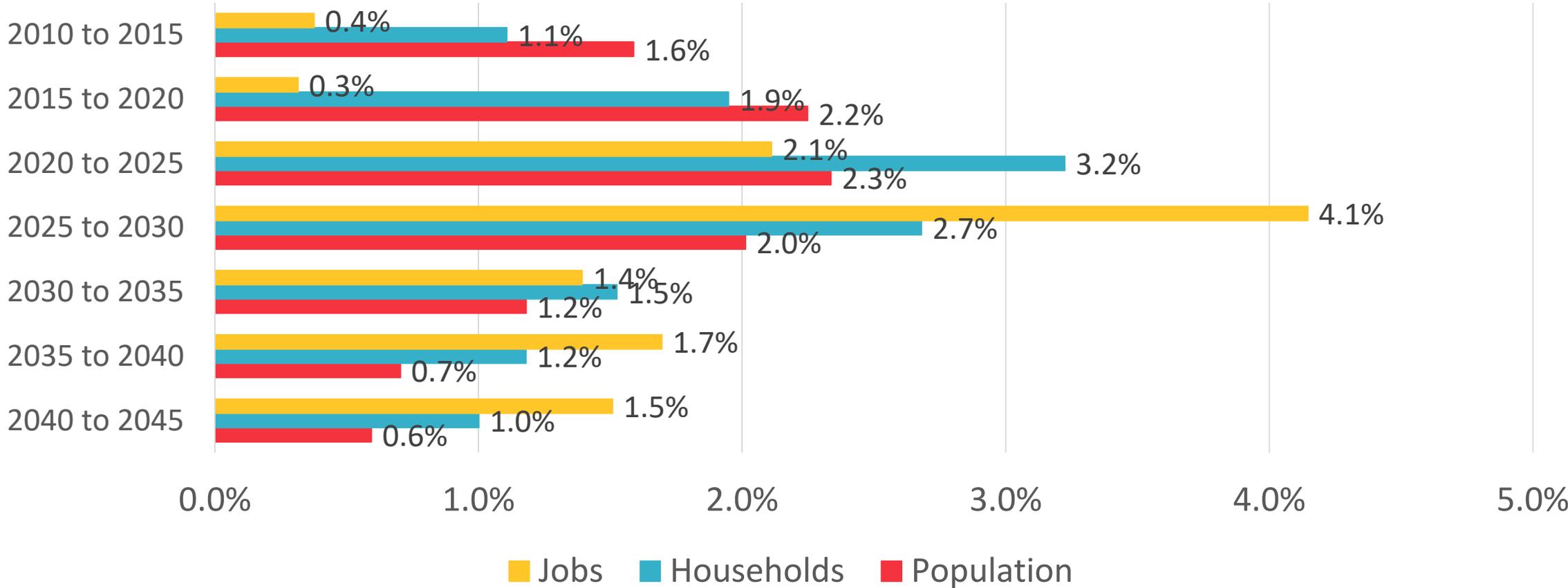
(Prior MWCOC Forecasts Compared to BLS Data)

Employment



I. Development-Based Projections

City of Falls Church Projections
Average Annual Percent Change, 2010-2045



Source: LSA, City of Falls Church

I. Development-Based Projections

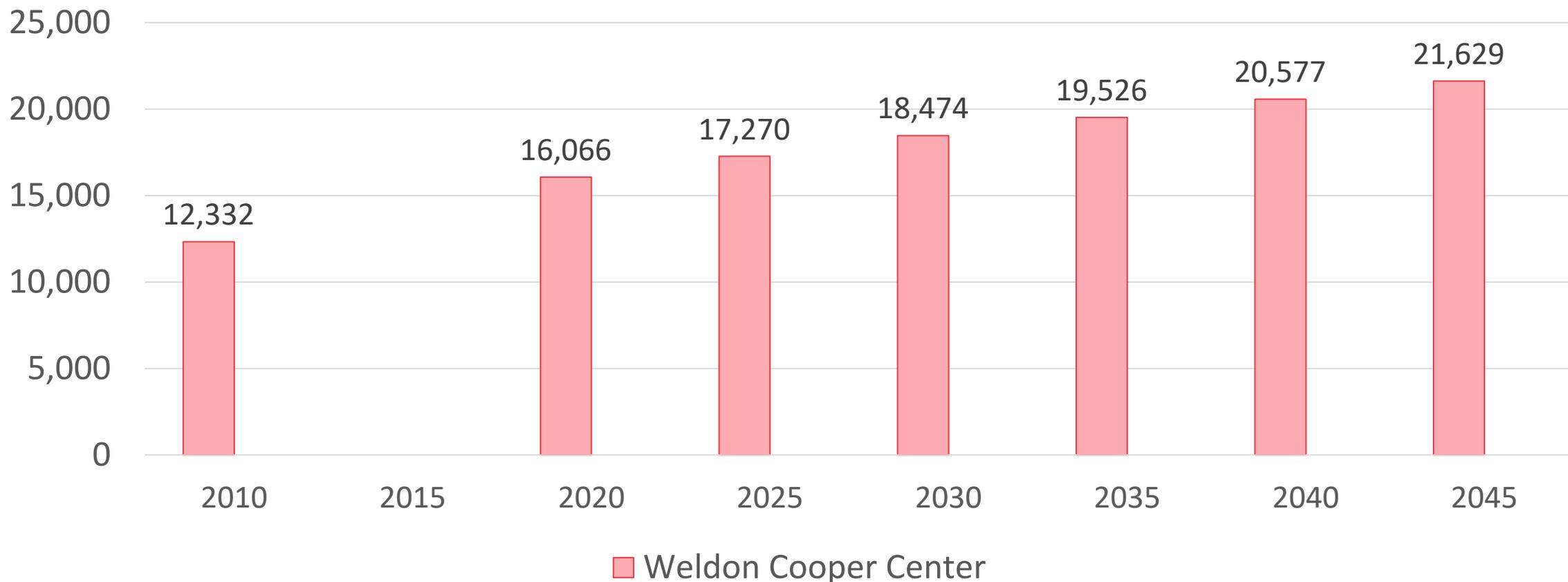
Comparison of Projections for City of Falls Church and Nearby Activity Centers

Percent Change, 2015-2045

TBD

II. Growth Rate/Extrapolation/Hamilton-Perry Method

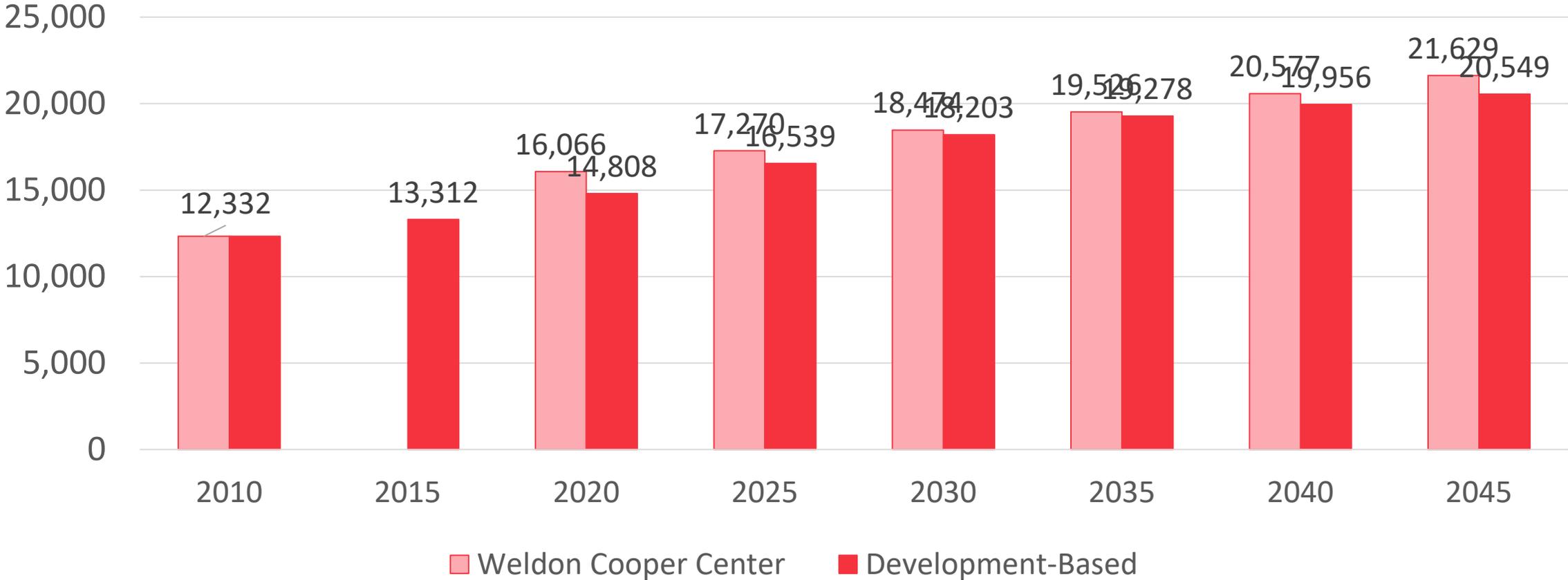
City of Falls Church Population Projections, 2010 to 2045



Source: LSA, City of Falls Church, University of Virginia's Weldon Cooper Center

II. Growth Rate/Extrapolation/Hamilton-Perry Method

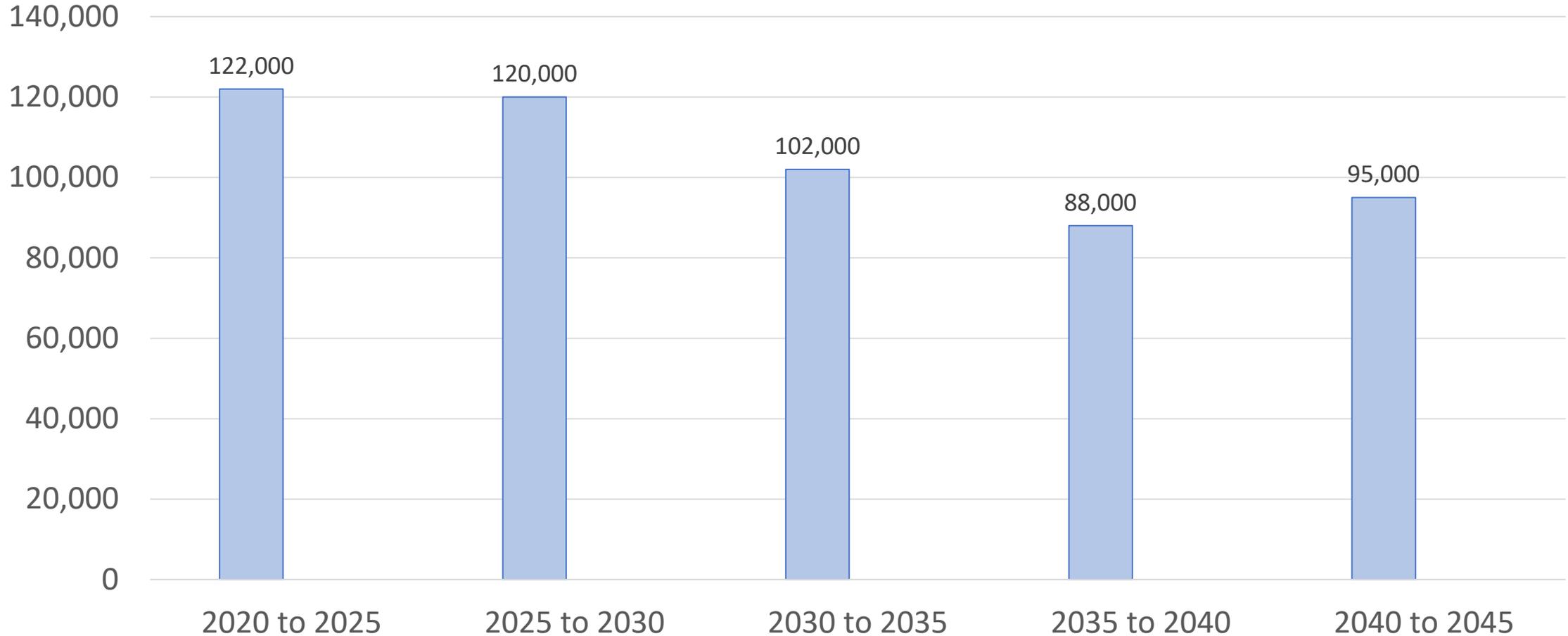
City of Falls Church Population Projections, 2010 to 2045



Source: LSA, City of Falls Church, University of Virginia's Weldon Cooper Center

III. Demand-Based Approach

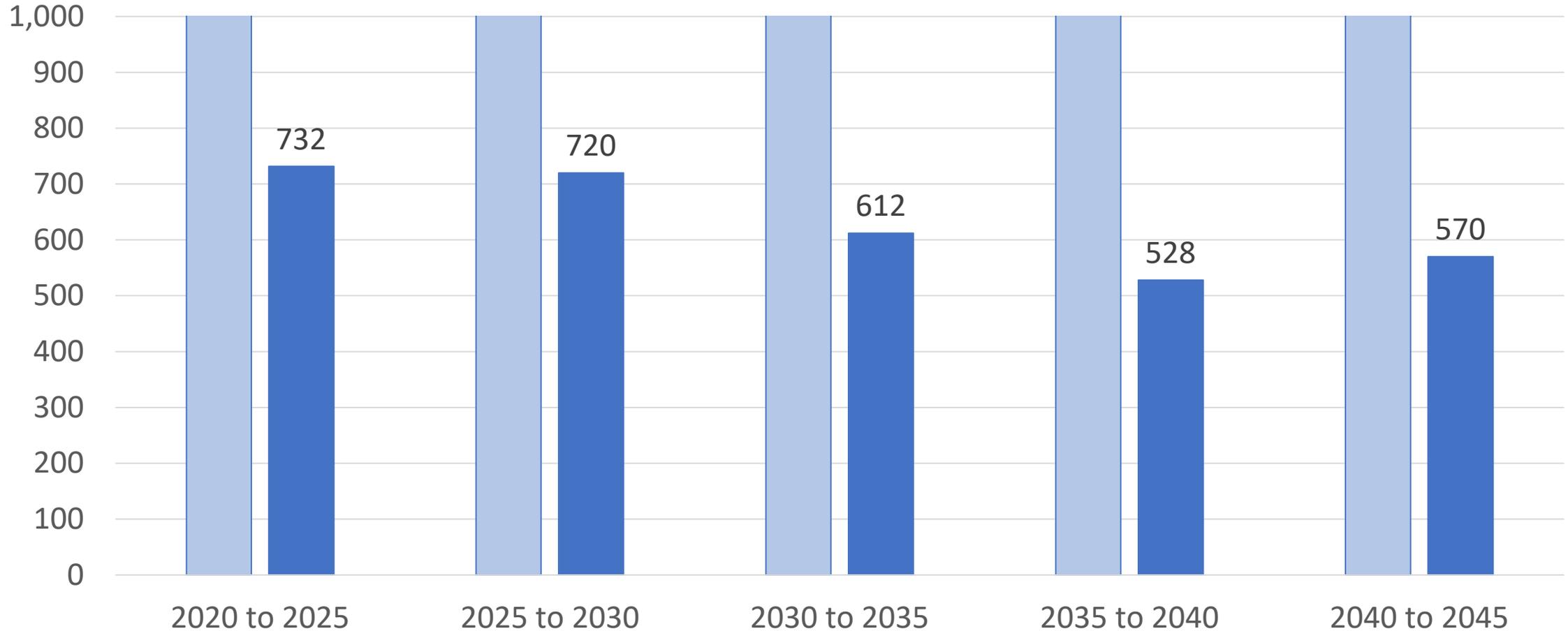
Washington DC Region Housing Demand, 2020-2045
Metropolitan Washington Council of Governments



III. Demand-Based Approach

Washington DC Region Housing Demand, 2020-2045
Metropolitan Washington Council of Governments

Region Falls Church



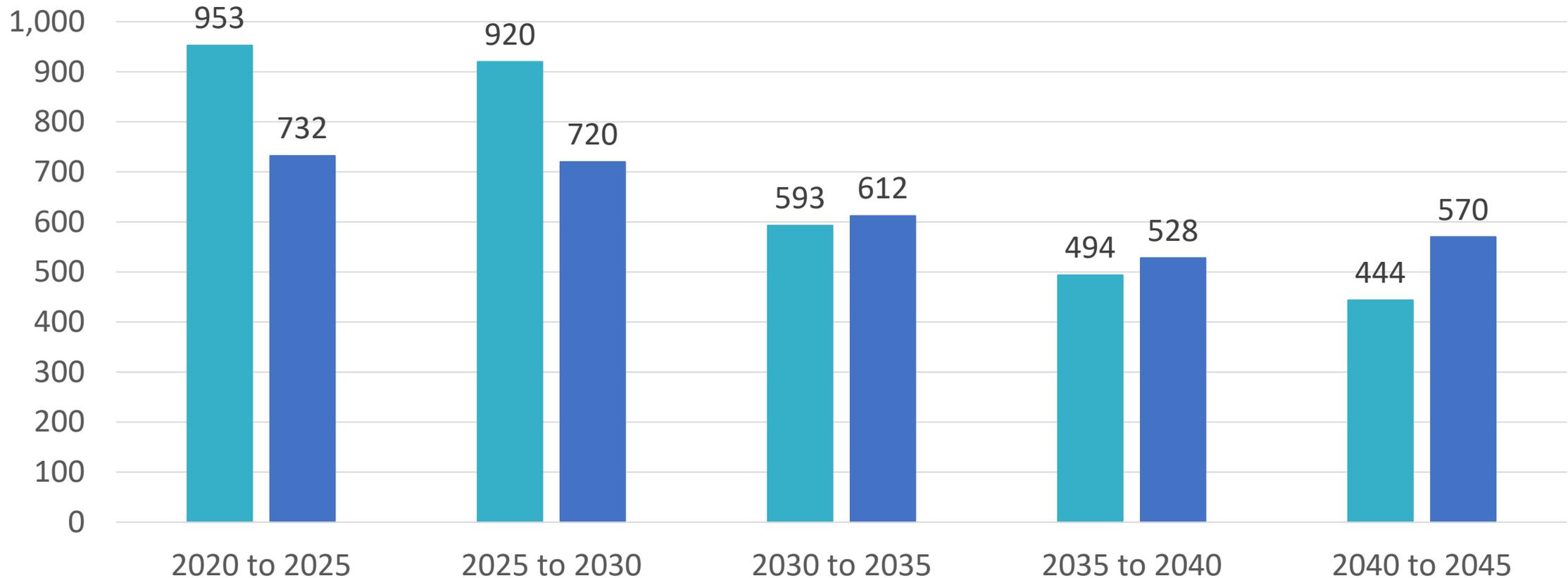
Source: LSA, MWCOG

Note: Updated since February 19 Planning Commission work session based on additional information about the locations of future jobs.

III. Demand-Based Approach vs. Development-Based Method

City of Falls Church
Household Projections, 2020-2045

■ Development-Based ■ Demand-Based

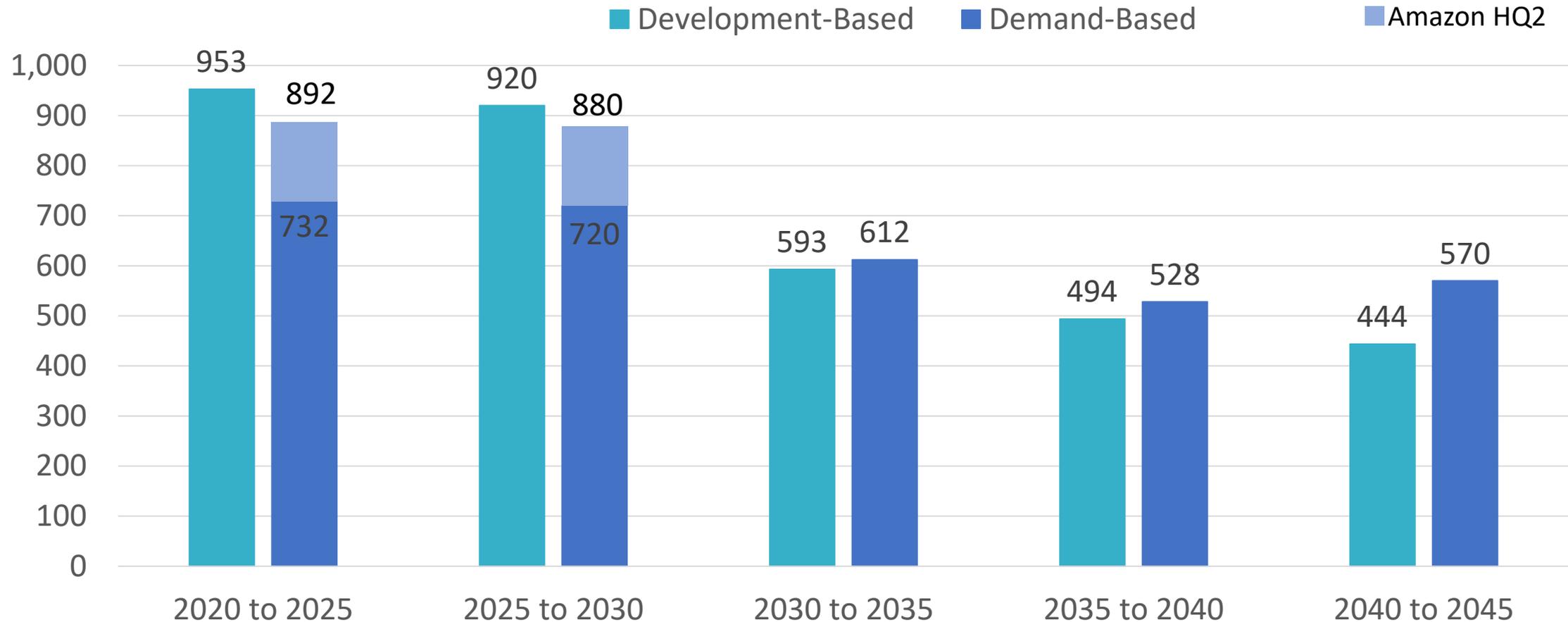


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III. Demand-Based Approach vs. Development-Based Method

City of Falls Church
Household Projections, 2020-2045

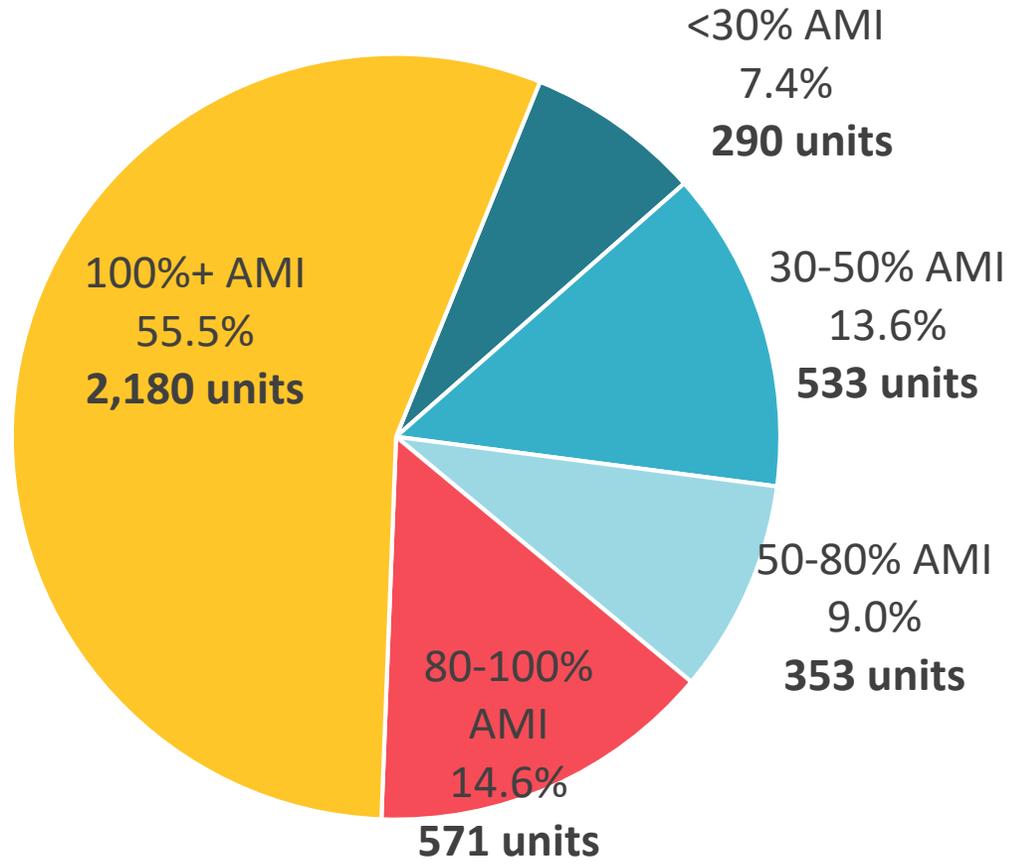


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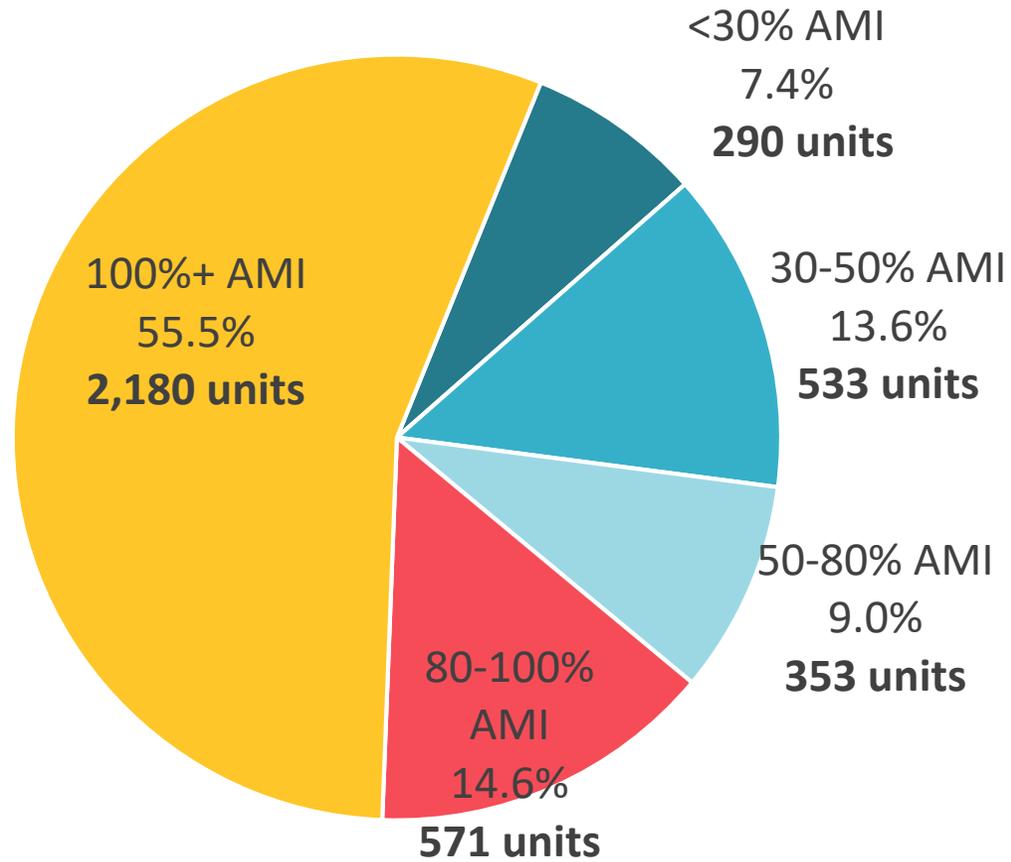
III. Demand-Based Approach

Housing Demand by Income Group, 2015 to 2045

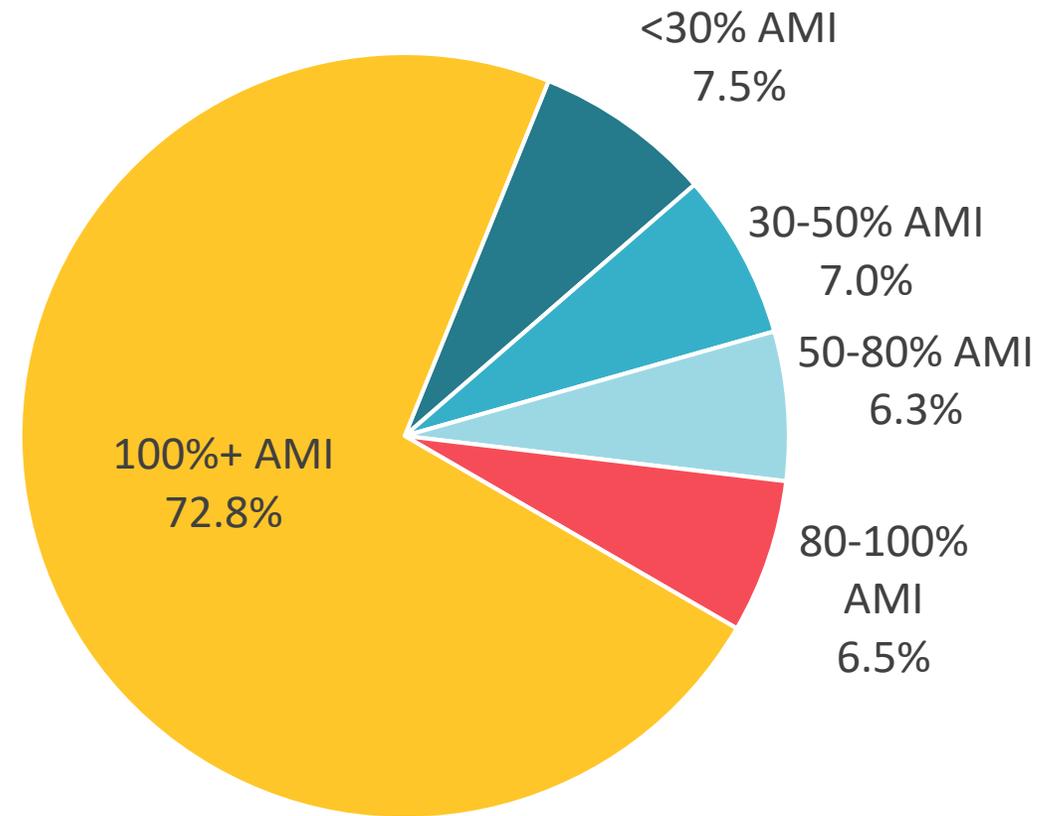


III. Demand-Based Approach

Housing Demand by Income Group, 2015 to 2045



Current Household Incomes Distribution



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Discussion

Connections - Housing

- › Is the City planning for **ENOUGH** housing?
- › Is the City planning for the **RIGHT TYPES** of housing?
- › What are the implications of significantly more **MULTIFAMILY** homes in the City?
- › What household/family types might be **EXCLUDED** from the City?
- › What happens if there is a **SLOWDOWN** in new home construction?
- › How does Amazon **HQ2** impact the demand for housing?

Connections – Economic Development

- › What are the **CONSTRAINTS** to attracting new businesses?
- › How many new residents are needed to **SUPPORT JOB GROWTH** in the City?
- › What are the implications for residential **PROPERTY TAXES** if the City expands commercial development?
- › What if there is a **SLOWDOWN** in new commercial development?
- › What happens if the **WORKING AGE** population in the City does not grow?
- › What are the implications of Amazon **HQ2** for economic development in the City?

Connections – Public Facilities

- › What do these forecasts suggest for **SCHOOL ENROLLMENT** projections?
- › What is the impact on **SCHOOLS** of an increase in multifamily housing in the City?
- › What does projected growth mean for **PARKS, COMMUNITY CENTERS AND LIBRARIES** in the City?
- › Does the City have the necessary **INFRASTRUCTURE** to support projected growth?
- › Is the projected **BALANCE** of residential and commercial growth appropriate to support public facilities?

Topics

An aerial photograph of a city, showing a dense grid of streets and buildings. Overlaid on the bottom half of the image is a flowchart consisting of four chevron-shaped boxes pointing from left to right. The first three boxes are light beige, and the fourth is purple. The text inside the boxes is 'Trends', 'Projections', 'Connections', and 'Discussion' respectively.

Trends

Projections

Connections

Discussion

Discussion / Q&A



