BACKGROUND INFORMATION FOR PLANNING WORKSHOP
EXTERNAL SCANNING REPORT

Demographic and Economic Profile of the Washington, D.C. Metropolitan Area: Historical Trends and Future Outlook

Office of Institutional Effectiveness and Student Success Initiatives

October 2014

NOVA | Northern Virginia Community College

Demographic and Economic Profile of the Washington, D.C. Metropolitan Area: Historical Trends and Future Outlook

Research Report 93-15

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Northern Virginia Community College

October 2014

NORTHERN VIRGINIA COMMUNITY COLLEGE

OFFICE OF INSTITUTIONAL EFFECTIVENESS AND STUDENT SUCCESS INTIATIVES

The purpose of the Office of Institutional Effectiveness and Student Success Initiatives is to conduct analytical studies and provide information in support of institutional planning, policy formulation, and decision making. In addition, the office provides leadership and support in research-related activities to members of the NOVA community engaged in planning and evaluating the institution's success in accomplishing its mission.

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Foreword

The Office of Institutional Effectiveness and Student Success Initiatives at Northern Virginia Community College (NOVA) is pleased to present the following reports:

- *Demographic and Economic Profile of the Washington, D.C. Metropolitan Area: Historical Trends and Future Outlook* and
- *Trends and Patterns in Access and Student Success at NOVA*.

The *Demographic and Economic Profile of the Washington, D.C. Metropolitan Area: Historical Trends and Future Outlook* report contains data on economic indicators with sections on the region's population demographics, educational attainment, occupations, major employers, federal government procurement, income, and real estate. The *Trends and Patterns in Access and Student Success at NOVA* report presents NOVA student access and student success metrics, which include enrollment, course completion, retention, persistence, graduation, and transfer rates. The reports are designed to serve as readily-available sources of information about the region and the College.

The Office of Institutional Effectiveness and Student Success Initiatives staff is acknowledged for compiling the reports. The staff conducted extensive research, collected relevant data, and drafted the reports. The contributions of the staff are greatly appreciated. The reports will be referenced during the NOVA College Board Retreat to plan for Strategic Vision 2021.

George E. Gabriel, Ph.D.
Vice President of Institutional Effectiveness
and Student Success Initiatives

Introduction

Strategic planning is central to the mission and vision of Northern Virginia Community College (NOVA) "to deliver world-class, in-person and online post-secondary teaching, learning, and workforce development to ensure our region and the Commonwealth of Virginia have an educated population and globally competitive workforce." In Fall 2003, the College initiated planning for the 21st Century, which led to development of the College's current strategic plan: *Strategic Vision 2015: Gateway to the American Dream* (Approved 2004, Revised 2007, 2010). Based on this plan and the efforts of the NOVA community, NOVA has grown tremendously over the past decade, increasing both student access and student success. In 2007, NOVA joined the Achieving the Dream initiative founded by Lumina, and in 2010 NOVA was designated a Leader College for "three years of sustained student success improvement." NOVA has achieved its strategic goal to become a model for other community colleges in the nation.

This current strategic planning cycle (2015-2021) will build on the foundation of the previous strategic plan and will work to continue to improve student access and success even further during the next six years and sustain NOVA's role as a leader. Since the beginning of the new millennium, the nation and region have been faced with many challenges from September 11th (2001) to the economic recession (2008 to 2009), still affecting much of the country. As one of the economic engines of the Commonwealth of Virginia and the region surrounding and encompassing the Nation's Capital, Northern Virginia's continued recovery and growth is absolutely critical, and NOVA will continue to have a large role to play in this endeavor.

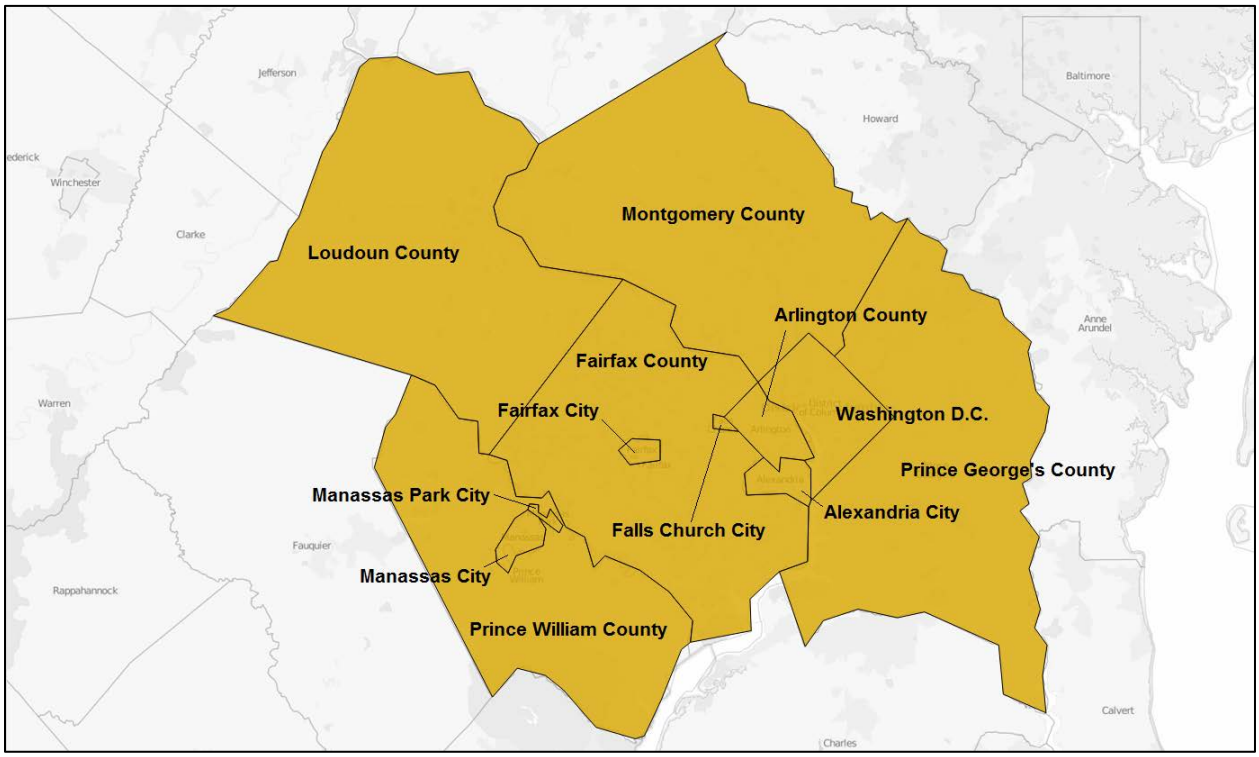
The purpose of this external scanning report is to examine information outside of NOVA itself to assist the College in establishing priorities and to better serve the needs of the region and its constituency. The external planning report compiles data from a variety of sources to provide a detailed demographic and economic profile of the Washington, D.C. metropolitan area, including the primary NOVA service jurisdictions. The demographic profile is disaggregated by population according to region, age and race/ethnicity, and by educational attainment. Education data for the Washington metropolitan area also includes data on tuition and fees and education appropriation for Virginia and Maryland per FTE. The economic profile includes data on labor participation, unemployment rates, major industries and occupations, federal government procurement, income, and real estate.

The report includes both historical data and future projections, wherever possible, in order to show how the region has changed over the past decade, as well as where forecasters predict it is headed. In most cases, analysis of the data begins with historical trends from the beginning of the 21st Century up to the most current data available and then proceeds to provide projections where available through 2021. Data sources are included under the tables and figures and are briefly described in the Appendix.

Chapter 1 presents an overview of the economy of the Washington metropolitan area as a whole. For the purposes of this report unless otherwise stated, the Washington metropolitan area consists of Washington, D.C., Alexandria City (VA), Arlington County (VA), Fairfax City (VA), Fairfax County (VA), Falls Church City (VA), Loudoun County (VA), Manassas City (VA), Manassas Park City (VA), Prince William County (VA), Montgomery County (MD), and Prince George's County (MD). Chapters 2 through 5 are centered explicitly on the primary NOVA service jurisdictions. Chapter 2 covers Alexandria City and Arlington County. Chapter 3 includes Fairfax County, Fairfax City, and Falls Church City. Chapter 4 encompasses Loudoun County. Chapter 5 contains Prince William County, Manassas City, and Manassas Park City. Each chapter presents detailed demographic information and economic indicators for the specified regions.

An effort was made by the Office of Institutional Effectiveness and Student Success Initiatives to gather and access data that was not readily available and compile it into one report. The most important consideration was that the data should be informative and useful in strategic planning for the NOVA service region for the upcoming six years: 2015 through 2021. The vision of NOVA as "a learner-centered organization" demands that the College continually examines its role and purpose in the region, and whether or not it is meeting its mission.

Chapter 1: Economic Profile of the Washington Metropolitan Area



Chapter 1: Economic Profile of the Washington Metropolitan Area

Overview of the Washington, D.C. Metropolitan Area

The Washington, D.C. metropolitan area is one of the most vibrant regions in the United States. Home to the nation's capital, it comprises the District of Columbia and six counties and five independent cities in the Maryland and Virginia suburbs with a population of over 4.8 million people. The area attracts people from around the United States and the world, and is continuing to increase in racial and cultural diversity with some regions now encompassing a "majority minority."

The region's population grew during the recession (2008 to 2012), and the population continues to grow. According to the Bureau of Economic Analysis, the Washington, D.C. area is the fourth largest metropolitan economy as ranked by real gross domestic product (GDP) in 2013 (as cited in Panek, Hinson, Rodriguez, 2013). "While other communities continue to recover from the economic downturn, Greater Washington stands today as one of the country's most economically successful regions" (Greater Washington Bureau of Trade [BOT], 2013, p. 1). Since 2006, the Greater Washington economy has grown by nearly 7.5 percent on an inflation-adjusted basis. No other major metropolitan area in the United States has experienced a greater level of economic growth during this period (BOT, p.2). Additionally, the region is home to more *Fortune 500* companies than any other region in the country with combined revenues of nearly a half-trillion dollars in 2011 (BOT, p. 4).

The Washington metropolitan area is also among the most educated in the nation. Six of the ten most educated counties in the U.S. are located in Greater Washington and include Arlington County (VA), Howard County (MD), Alexandria City (VA), Fairfax County (VA), Montgomery County (MD), and Loudoun County (VA) (BOT, 2013, p. 6). "Twenty-two percent of the region's workforce has a graduate or professional degree, and 48 percent has a Bachelor's degree. These figures place Greater Washington first among the nation's major metropolitan areas" (BOT, p. 6).

While employment and educational attainment figures are high in the Washington metropolitan area, reports from the Center for Education and the Workforce anticipate even greater demand in the future for post-secondary credentials nationwide and in the Northern Virginia area. In their report, *Recovery: Job Growth and Education Requirements Through 2020* (2013), Carnevale, Smith, and Strohl state that while total employment is predicted to increase "by almost 24 million, from 141 million to 165 million by 2020," there is expected to be "a five million shortfall of workers with the post-secondary credentials needed by 2020" (p. 3). In particular, "jobs in the District of Columbia will require the highest concentration of post-secondary education in 2020" at 76 percent with Maryland (69 percent) and Virginia (67 percent) also higher than the national average of 65 percent (pp. 3-4).

Another critical higher education topic nationwide is STEM (Science, Technology, Engineering, and Mathematics) education, because of its critical relationship to economic competitiveness and the increasing demand for STEM workers at all educational levels (Carnevale, Smith &

Melton, 2011). According to the report on STEM by the Center for Education and the Workforce, 92 percent of traditional STEM jobs will require "at least some post-secondary education and training" by 2018 (p. 5). Moreover, "the highest proportion of STEM jobs as a fraction of job openings through 2018" are predicted to be in the District of Columbia (10 percent), followed by Virginia (8 percent) (p. 3). Research also highlights the even greater demand for STEM competencies across the entire economy (p. 2) in regard to knowledge, skills, abilities, and work interests, particularly in professional/business services and healthcare services (p. 3), two of the top industries in the Washington metropolitan area.

Summary

Population Growth and Demographic Shifts

- The Washington metropolitan area experienced high population growth between 2001 and 2012 (17 percent), and is projected to increase by 9 percent between 2012 and 2021. The expected growth in the region bodes well for the College as more people in the service area may translate into more prospective students for the College.
- Between 2001 and 2012, the population within NOVA's service area in Northern Virginia experienced the highest overall increase (25 percent growth) as compared to Washington, D.C. (9 percent growth) and Prince George's and Montgomery Counties in Maryland (10 percent growth).
- Between 2012 and 2021, the Washington, D.C. population is projected to grow 8 percent; Prince George's and Montgomery Counties in Maryland are projected to grow 4 and 7 percent, respectively. Northern Virginia counties in NOVA's service area, overall, are projected to grow 12 percent.
- Population projections for 2021 suggest that growth for individuals within the "traditional college-age", the 20 to 24 year old population and the 25 to 29 population, is projected to grow more slowly than the overall population. The 20 to 24 year old population is projected to experience 7 percent growth between 2012 and 2021, and the area population of 25 to 29 year olds is also projected to increase by 7 percent over the same time period.
- The white population is projected to remain the largest racial/ethnic group in the Washington metropolitan area in 2021 (41 percent) but will constitute a smaller portion of the area population as compared to 2001 (50 percent). The white population is expected to grow at 3 percent between 2012 and 2021, whereas higher growth is expected among all other groups, including the Asian and Hispanic populations (19 percent growth each), and the black population (5 percent growth).
- The population age 60 and older grew by 46 percent between 2001 and 2012 and is projected to grow 29 percent between 2012 and 2021. The 60 and older age group increased from 13 percent of the total population in 2001 to 16 percent in 2012 and is projected to be 19 percent of the Washington metropolitan area population in 2021.

Educational Attainment

- Between 2001 and 2012, the proportion of the area population age 25 and older with a Bachelor's degree or higher increased from 46 to 50 percent. Projections indicate that the 2021 level of educational attainment will be similar to the 2012 level.
- The number of people age 25 and older in the Washington metropolitan area with no more than a high school diploma is projected to increase by 123,679 from 2012 to 2021 (13 percent). The number of people age 25 and older with an Associate's degree or some college is projected to increase by 69,345 from 2012 to 2021 (10 percent).
- Between 2004-05 and 2013-14, the national average for annual tuition and fees at public two-year institutions increased by 28 percent, while tuition and fees at public two-year institutions increased by 9 percent in Maryland and 69 percent in Virginia.
- Over this same time period, in Virginia and Maryland, the average annual tuition and fees at public four-year institutions were more than double the average annual tuition and fees charged at public two-year institutions.

Economic Indicators

- The unemployment rate in the Washington metropolitan area has consistently been lower than the national average (5.4 percent compared to 7.4 percent in 2013).
- Total federal government procurement for firms located in the Washington metropolitan area increased 44 percent between 2005 and 2010.
- While venture capital investment in the Washington metropolitan area fluctuated with the changing economy over the last decade, total dollar investment in the region during 2013 ($1,533,673,900) was the highest since 2001.
- Annual inflation in the Washington metropolitan region trends slightly higher than the U.S. city average. In 2013, the inflation rate in the Washington metro area equaled the U.S city average (1.5 percent).
- Between 1999 and 2012, annual per capita income levels increased the most in Washington, D.C. (20 percent). In Northern Virginia, annual per capita income increased in all jurisdictions within NOVA's service area (ranging from 3 to 19 percent growth), with the exception of Manassas City and Manassas Park City (decrease of 11 and 1 percent, respectively). Arlington County saw the largest increase in annual per capita income (19 percent) over this time period. Changes in median household incomes between 1999 and 2012 followed similar patterns, although the median household income growth (or decrease in the case of Manassas City and Manassas Park City) was generally greater than per capita income changes.
- Office vacancy rates in Northern Virginia were higher compared to Washington, D.C. or the entire Washington metropolitan area in 2009, 2010, 2011, and 2012 (3rd Quarter).
- The median price of existing homes sold in the Washington metropolitan area increased by 207 percent from 2000 to 2005, but then decreased by 31 percent from 2005 to 2009, and increased slightly by 2 percent from 2009 to 2011. Overall, the median price of existing homes more than doubled between 2000 and 2011, increasing 115 percent from 2000 to 2011.

- The number of new housing permits issued in 2013 (24,033) was considerably lower than the number issued in 2004 (38,024) and 2005 (36,776). In 2013, the valuation of new privately owned housing units authorized in the area was in excess of $3.5 billion.

Employment Trends

- Between 2001 and 2012, overall job growth in the Washington metropolitan area increased by 9 percent, and is projected to further increase by 11 percent (290,607 new jobs) between 2012 and 2021. Projections for 2021 suggest that employment across most industries is likely to remain the same proportionately, with the government and the professional, scientific, and technical services industry employing the largest portion of the future workforce (22 percent and 18 percent, respectively). The three industries in the area that are projected to show the greatest increase in the number of jobs between 2012 and 2021 are professional, scientific, and technical services (approximately 80,000 new jobs); health care and social assistance (about 58,000 new jobs), and accommodation and food services (approximately 33,000 new jobs).
- Among occupation groups, the largest proportion of area workers were employed in office and administrative support occupations in 2012 (14 percent), and projections for 2021 suggest that this occupational category will constitute the largest group of the future workforce (13 percent) followed by business and financial-related occupations (11 percent), sales and related occupations (8 percent), and management occupations (8 percent).
- According to the 2014 *Fortune 500* report, the Washington metropolitan area was home to 16 *Fortune 500* companies, over half of which were in Fairfax County.

I. Population

The Washington metropolitan area had the fifth highest growth rate of the 15 largest metropolitan areas in the United States in 2012-2013 (CRA Census Series, p. 1). Table 1.1 presents population data for the Washington metropolitan area[1] in 2001, 2012, and the projected figures for 2021. Between 2001 and 2012, all jurisdictions within the Washington metropolitan area increased in population. The population within Northern Virginia Community College's (NOVA) service area in Northern Virginia experienced the highest overall population growth (25 percent) as compared to Washington, D.C. (9 percent) or Prince George's and Montgomery Counties in Maryland (10 percent). Among counties in the Northern Virginia service area, Loudoun County experienced the highest growth (78 percent) between 2001 and 2012. Fairfax County, which remains the most populated, grew 13 percent over the same period.

Projections for 2021 suggest that population growth across all regions will continue. The Washington, D.C. population is projected to grow 8 percent between 2012 and 2021, while Prince George's and Montgomery Counties in Maryland are expected to grow 4 and 7 percent, respectively. Northern Virginia counties in NOVA's service area, overall, are projected to grow 12 percent. Manassas Park City and Loudoun County are projected to have the highest population growth between 2012 and 2021 (21 and 19 percent, respectively). Fairfax County is projected to grow 8 percent over the same period.

Table 1.1. Washington Metropolitan Area Population: 2001, 2012, and 2021

Region	2001 Population	2012 Population	Change from 2001 to 2012		2021 Population*	Change from 2012 to 2021*	
			#	%		#	%
Washington, D.C.	***574,501***	***624,743***	***50,242***	***8.7***	***674,546***	***49,803***	***8.0***
Virginia Regional Total	***1,879,986***	***2,347,156***	***467,170***	***24.8***	***2,628,754***	***281,598***	***12.0***
Alexandria City	130,935	147,033	16,098	12.3	161,943	14,910	10.1
Arlington County	190,409	220,767	30,358	15.9	245,846	25,079	11.4
Fairfax County	991,551	1,117,209	125,658	12.7	1,210,356	93,147	8.3
Fairfax City	21,668	22,759	1,091	5.0	23,890	1,131	5.0
Falls Church City	10,550	13,121	2,571	24.4	15,054	1,933	14.7
Loudoun County	189,905	337,692	147,787	77.8	402,389	64,697	19.2
Prince William County	298,852	432,528	133,676	44.7	505,125	72,597	16.8
Manassas Park City	10,777	15,921	5,144	47.7	19,185	3,264	20.5
Manassas City	35,339	40,126	4,787	13.5	44,966	4,840	12.1
Maryland Regional Total	***1,709,139***	***1,880,232***	***171,093***	***10.0***	***1,993,708***	***113,476***	***6.0***
Montgomery County	891,741	1,002,731	110,990	12.4	1,077,307	74,576	7.4
Prince George's County	817,398	877,501	60,103	7.4	916,401	38,900	4.4

Source: QCEW Employees - EMSI 2014.1 Class of Worker
*EMSI projections

[1]Unless specified otherwise, the "Washington metropolitan area" as defined in this report includes the following regions: Washington, D.C., Alexandria City, Arlington County, Fairfax City, Fairfax County, Falls Church City, Loudoun County, Manassas City, Manassas Park City, Prince William County, Montgomery County (MD), and Prince George's County (MD).

Table 1.2 below provides the age distribution of the Washington metropolitan area in 2001, 2012, and projections for 2021. In 2001, the population age 19 and under and the population age 30 to 44 years old, constituted the two largest groups and accounted for about 27 and 26 percent of the 2001 population, respectively. In 2012, the proportion of the population age 19 and under was about the same (26 percent) as 2001. However, the proportion of 30 to 44 year olds experienced the smallest growth between 2001 and 2012 (2 percent growth), and decreased from 26 percent to 23 percent of the area population. Population growth between 2001 and 2012 was highest among the oldest age category with the 60 and over population growing by 46 percent. Projections for 2021 suggest that there will continue to be growth across all age categories except among the population age 45 to 59 years old. The 60 and over population is projected to grow faster than other groups and is expected to constitute 19 percent of the 2021 population, as compared to 13 percent in 2001 – a notable shift in the demographics of the region.

Table 1.2. Washington Metropolitan Area Population Disaggregated by Age: 2001, 2012, and 2021

Age Group	2001		2012		Change from 2001 to 2012		2021*		Change from 2012 to 2021*	
	#	%	#	%	#	%	#	%	#	%
19 and under	1,130,467	27.2	1,247,173	25.7	116,706	10.3	1,330,402	25.1	83,229	6.7
20 to 24 years	269,821	6.5	318,953	6.6	49,132	18.2	340,102	6.4	21,149	6.6
25 to 29 years	319,213	7.7	402,347	8.3	83,134	26.0	431,781	8.2	29,434	7.3
30 to 44 years	1,088,908	26.2	1,105,612	22.8	16,704	1.5	1,209,921	22.8	104,309	9.4
45 to 59 years	831,065	20.0	1,013,688	20.9	182,623	22.0	996,090	18.8	-17,598	-1.7
60 and Over	524,150	12.6	764,357	15.8	240,207	45.8	988,710	18.7	224,353	29.4
Total	**4,163,624**	**100.0**	**4,852,130**	**100.0**	**688,506**	**16.5**	**5,297,006**	**100.0**	**444,876**	**9.2**

Source: QCEW Employees - EMSI 2014.2 Class of Worker
*EMSI projections

Table 1.3 (next page) provides the racial/ethnic breakdown of the Washington metropolitan area population in 2001, 2012, and projections for 2021. The white population constituted the largest racial/ethnic group in 2001, 2012, and is projected to do so in 2021. However, the proportion of the white population in the region declined from 50 percent in 2001 to 43 percent in 2012 and is projected to be at 41 percent in 2021.There was significant growth across non-white racial/ethnic groups between 2001 and 2012. The population of Hispanics in the area experienced 75 percent growth and accounted for 16 percent of the population in 2012 as compared to 11 percent in 2001. While constituting a small portion (3 percent) of the 2012 population, the population who identified themselves with two or more races had the highest growth (82 percent growth) from 2001 to 2012. Projections for 2021 suggest that the area population is likely to continue to grow and increase in diversity. The Hispanic and Asian populations are projected to experience 19 percent growth each, the black population is projected to experience 5 percent growth, while the white population is expected to experience 3 percent growth.

Table 1.3. Washington Metropolitan Area Population Disaggregated by Race/Ethnicity: 2001, 2012, and 2021

Race/Ethnicity	2001		2012		Change from 2001 to 2012		2021*		Change from 2012 to 2021*	
	#	%	#	%	#	%	#	%	#	%
White	2,093,260	50.3	2,103,688	43.4	10,428	0.5	2,169,902	41.0	66,214	3.1
Black	1,198,566	28.8	1,302,271	26.8	103,705	8.7	1,371,587	25.9	69,316	5.3
Hispanic	444,204	10.7	775,345	16.0	331,141	74.5	951,777	18.0	176,432	22.8
Asian	346,356	8.3	532,007	11.0	185,651	53.6	631,174	11.9	99,167	18.6
American Indian or Alaskan Native	9,635	0.2	10,052	0.2	417	4.3	10,456	0.2	404	4.0
Native Hawaiian or Pacific Islander	2,491	0.1	3,096	0.1	605	24.3	3,430	0.1	334	10.8
Two or More Races	69,111	1.7	125,671	2.6	56,560	81.8	158,680	3.0	33,009	26.3
Total	**4,163,623**	**100.0**	**4,852,130**	**100.0**	**688,507**	**16.5**	**5,297,006**	**100.0**	**444,876**	**9.2**

Source: QCEW Employees - EMSI 2014.2 Class of Worker
*EMSI projections

II. Education

According to research conducted at George Mason University's (GMU) Center for Regional Analysis (2011), the Washington metropolitan area has a more highly educated population than any other major U.S. metropolitan area. The Washington metropolitan area is the fourth largest U.S. metropolitan area by population of college students (following New York City, Los Angeles, and Chicago), making it one of the leading hubs for higher education in the country (GMU, Center for Regional Analysis 2014).

Table 1.4 and Figure 1.1 (both next page) provide data on the educational attainment levels of the Washington metropolitan area population age 25 and older in 2001, in 2012, and projections for 2021. The data show that the percentage of Washington metropolitan area population holding a Bachelor's degree or higher increased from 46 percent in 2001 to 50 percent in 2012 and is projected to maintain that level in 2021. The U.S. Census Bureau estimates that in 2012 less than 12 percent of the U.S. population held a graduate degree or higher; however, in the same year, 24 percent of the Washington metropolitan area population had attained a graduate degree or higher.

Between 2001 and 2012, the population with an Associate's degree increased by 20 percent but remained the same as a proportion of the total population (5 percent). The proportion of the population with an Associate's degree is projected to hold at 5 percent into 2021. The proportion of the population with no more than a high school diploma decreased from 31 percent in 2001 to 29 percent in 2012 and is projected to hold at that level into 2021.

Table 1.4. Educational Attainment of Washington Metropolitan Area Population Age 25 and Older: 2001, 2012, and 2021

Educational Attainment	2001		2012		% Change from 2001 to 2012	2021*		% Change from 2012 to 2021*
	#	%	#	%		#	%	
Less Than 9th Grade	145,093	5.3	139,832	4.3	-3.6	140,683	3.9	0.6
9th Grade to 12th Grade	194,317	7.0	225,264	6.9	15.9	294,422	8.1	30.7
High School Diploma	506,595	18.3	576,345	17.5	13.8	630,015	17.4	9.3
Some College	497,357	18.0	538,768	16.4	8.3	592,643	16.3	10.0
Associate's Degree	137,726	5.0	165,629	5.0	20.3	181,099	5.0	9.3
Bachelor's Degree	687,294	24.9	847,073	25.8	23.2	924,073	25.5	9.1
Graduate Degree and Higher	594,955	21.5	793,093	24.1	33.3	863,566	23.8	8.9
Population Age 25 and Older	**2,763,337**	**100.0**	**3,286,004**	**100.0**	**18.9**	**3,626,501**	**100.0**	**10.4**

Source: QCEW Employees - EMSI 2014.2 Class of Worker
*EMSI projections

Figure 1.1. Educational Attainment of Washington Metropolitan Area Population Age 25 and Older by Education Level: 2001, 2012, and 2021

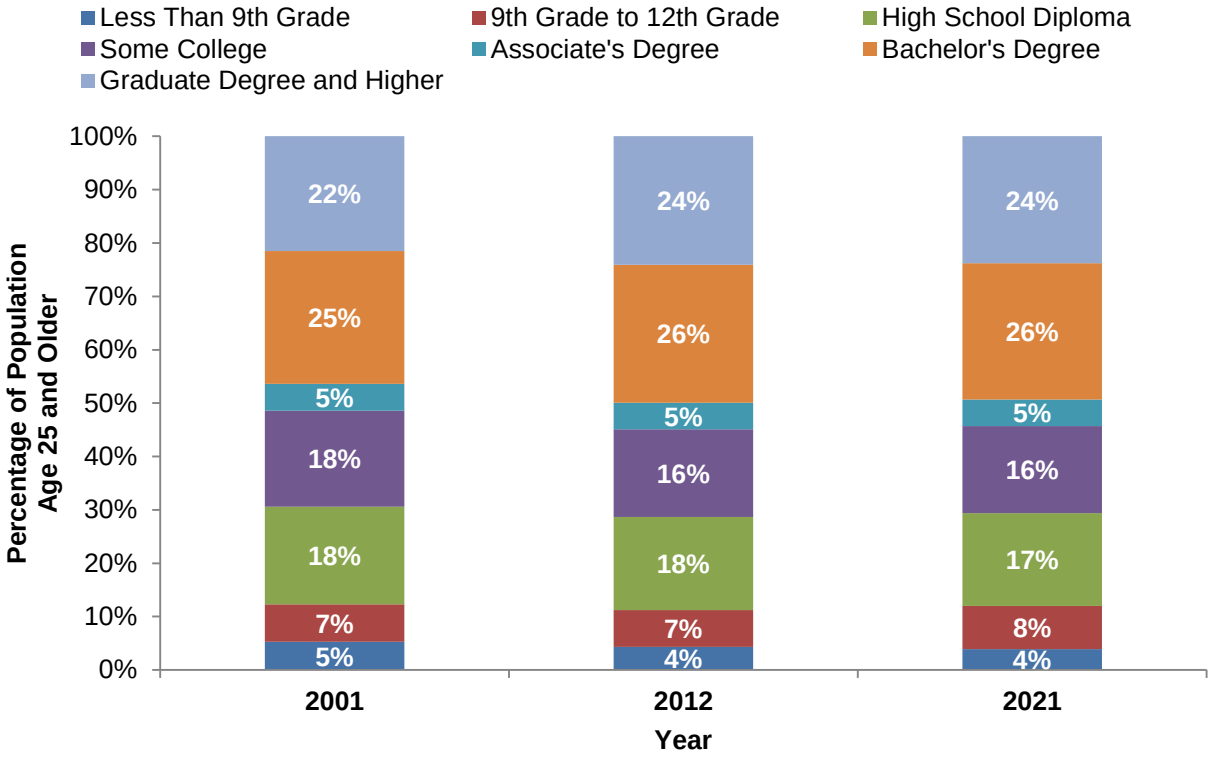


Table 1.5 and Figure 1.2 (next page) present data on average published annual tuition and fees at public two-year and public four-year institutions in Maryland and Virginia for the academic years 2004-05 through 2013-14. As aggregated data was not available for the Washington metropolitan area at the time of this report, state level data offered the best available measure of tuition costs in the area.

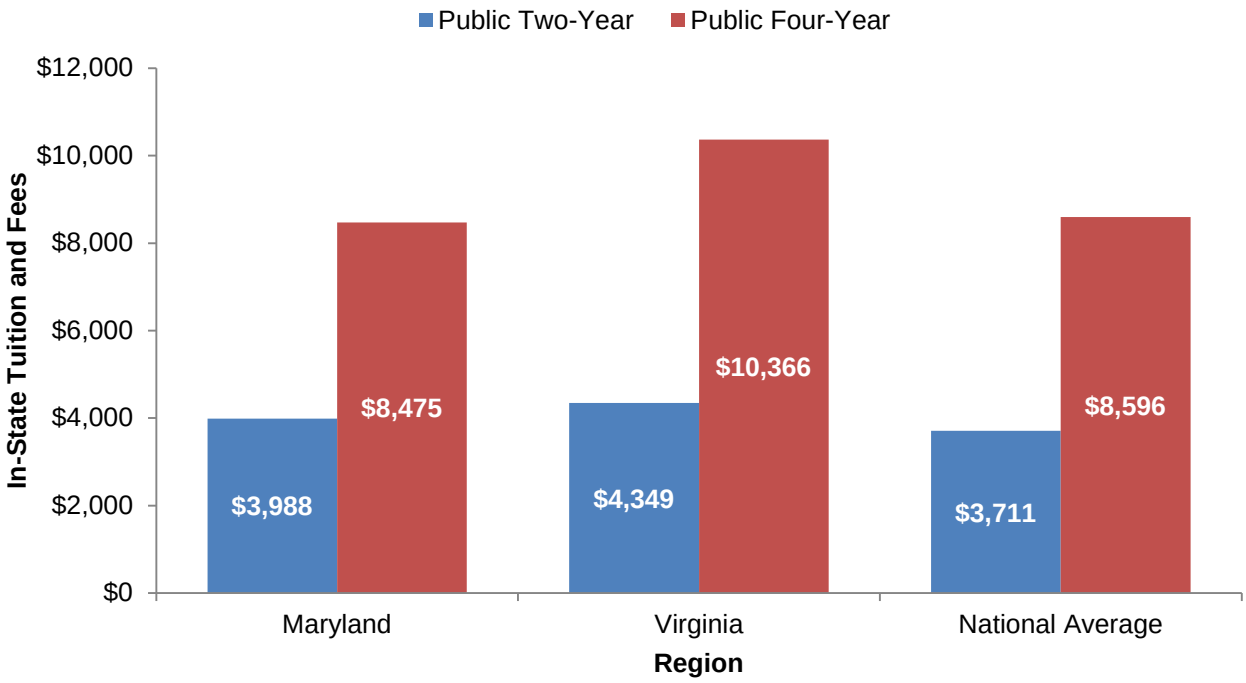
For all years presented, in Virginia and Maryland, average annual tuition and fees at public four-year institutions were more than double the average annual tuition and fees charged at public two-year institutions. Between 2004-05 and 2013-14, the national average for annual tuition and fees at public two-year institutions increased by 28 percent. The average annual tuition and fees at public two-year institutions increased by 9 percent in Maryland and 69 percent in Virginia during this same time period. The average annual tuition and fees at public four-year institutions increased by 2 percent in Maryland, 51 percent in Virginia, and 40 percent at the national level during the same time period.

Table 1.5. Average Published Tuition and Fees at Public Two-Year and Public Four-Year Institutions: 2004-05 through 2013-14

Academic Year	Public Two-Year In-State Tuition and Fees ($)*			Public Four-Year In-State Tuition and Fees ($)*		
	Maryland	Virginia	National Average	Maryland	Virginia	National Average
2004-05	3,673	2,567	2,897	8,350	6,881	6,120
2005-06	3,698	2,619	2,975	8,532	7,200	6,353
2006-07	3,584	2,723	2,983	8,283	7,526	6,511
2007-08	3,647	2,872	3,043	8,202	7,859	6,789
2008-09	3,535	3,037	3,025	7,850	8,051	6,851
2009-10	3,682	3,349	3,267	8,109	8,608	7,457
2010-11	3,822	3,841	3,411	8,290	9,439	7,941
2011-12	3,834	4,118	3,515	8,231	9,859	8,228
2012-13	3,962	4,274	3,644	8,371	10,095	8,521
2013-14	3,988	4,349	3,711	8,475	10,366	8,596
% Change from 2004-05 to 2013-14	**8.6**	**69.4**	**28.1**	**1.5**	**50.7**	**40.4**

Source: The College Board, Annual Survey of Colleges
*Figures are in 2013 U.S. dollars.

Figure 1.2. Average Published Tuition and Fees at Public Two-Year and Public Four-Year Institutions: 2013-14



As illustrated in Figure 1.3 (next page), in the 2004-05 academic year, average annual tuition and fees at public two-year institutions in Virginia were lower than in Maryland and the national average. However, by 2010-11, average tuition and fees at public two-year institutions in Virginia exceeded the average charged at public two-year institutions in Maryland and the national average (average tuition in Maryland actually decreased in some years). Between 2008-09 and 2011-12, Virginia experienced its highest annual increases in tuition. In a 2012-13 survey conducted by the Washington Student Achievement Council, Virginia's community colleges were ranked the 19th most expensive in the nation (SCHEV, 2013). In 2012-13 according to the same survey, public colleges and state universities in Virginia (including George Mason University, Old Dominion University, James Madison University, Longwood University, and Radford University) were the 7th most expensive in the nation.

Figure 1.3. Average Published Tuition and Fees at Public Two-Year Institutions: 2004-05 through 2013-14

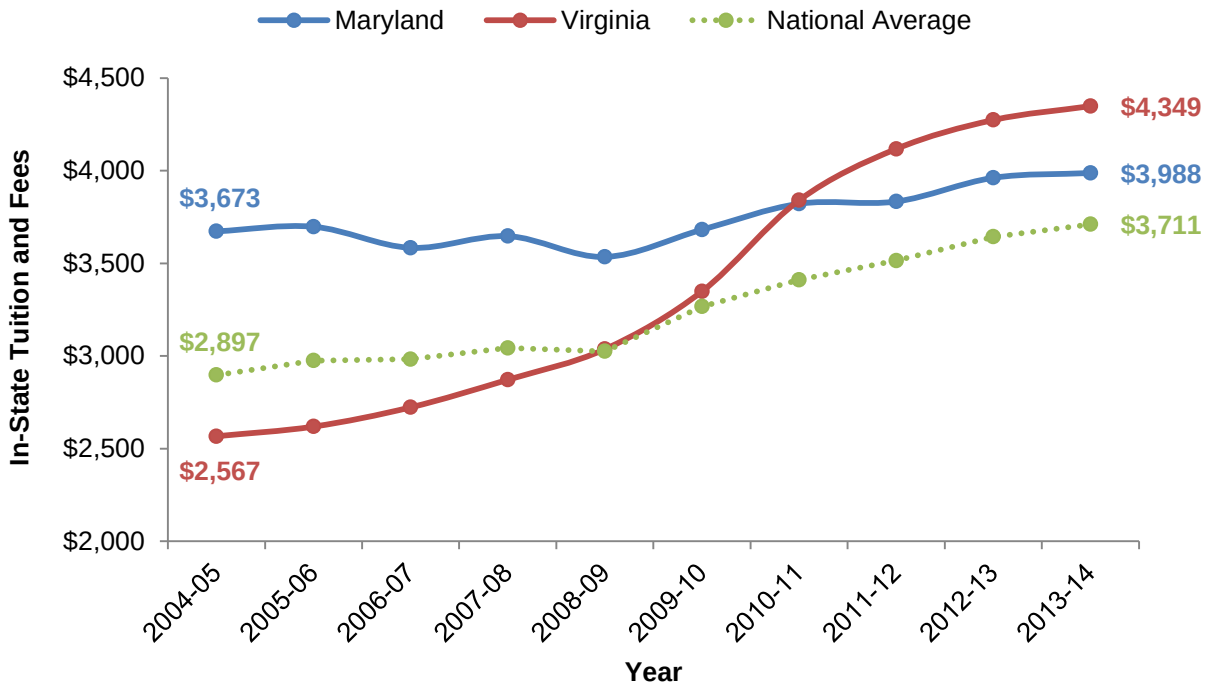


Table 1.6 presents data on education appropriations (money set aside specifically for higher education) per full-time equivalent student (FTE) in Maryland and Virginia for fiscal years 2008, 2012 and 2013. For all years presented, education appropriations per FTE in Maryland were above the national average while appropriations per FTE in Virginia were below the national average. Between FY 2008 and 2013, appropriations per FTE decreased by 20 percent in Maryland and by 28 percent in Virginia. However, while appropriations per FTE decreased by 2 percent in Maryland between FY 2012 and 2013, they increased by 4 percent in Virginia.

Table 1.6. Education Appropriations per FTE (Constant Adjusted 2013 U.S. Dollars)

Area	FY 2008 ($)	FY 2012 ($)	FY 2013 ($)	% Change FY 2012 to FY 2013	% Change FY 2008 to FY 2013
Maryland	8,412	6,894	6,756	-2.0	-19.7
Virginia	6,341	4,352	4,545	4.4	-28.3
United States	7,924	6,020	6,105	1.4	-23.0

Source: State Higher Education Executive Officers, *State Higher Education Finance FY 2013*
Notes: 1) Educational appropriations are a measure of state and local support available for public higher education operating expenses including ARRA funds, and exclude appropriations for independent institutions, financial aid for students attending independent institutions, research, hospitals, and medical education.
2) Adjustment factors, to arrive at constant dollar figures, include Cost of Living Adjustment (COLA), Enrollment Mix Index (EMI), and Higher Education Cost Adjustment (HECA).The Cost of Living Adjustment (COLA) is not a measure of inflation over time.

III. Employment

Washington Metropolitan Area[2] labor force data are presented in Table 1.7 for the years 2000 through 2013. The labor force population increased every year from 2000 to 2013. The population employed increased every year with the exception of 2009. In 2013, the labor force in the Washington metropolitan area totaled 3.2 million and the number employed approximately three million. The unemployment rate for the Washington metropolitan area rose from 2.7 to 5.4 percent from 2000 to 2013.

Table 1.7. Washington Metropolitan Area Employment: 2000 through 2013

Year	Labor Force	Employment	Unemployment	Unemployment Rate
	#	#	#	%
2000	2,670,065	2,597,248	72,817	2.7
2001	2,701,909	2,611,015	90,894	3.4
2002	2,749,469	2,639,129	110,340	4.0
2003	2,780,248	2,672,546	107,702	3.9
2004	2,833,955	2,729,977	103,978	3.7
2005	2,903,238	2,803,085	100,153	3.4
2006	2,962,332	2,870,753	91,579	3.1
2007	2,973,242	2,885,656	87,586	2.9
2008	3,045,734	2,933,449	112,285	3.7
2009	3,054,861	2,865,548	189,313	6.2
2010	3,102,464	2,901,716	200,748	6.5
2011	3,155,857	2,964,455	191,402	6.1
2012	3,196,761	3,014,964	181,797	5.7
2013	3,213,997	3,039,182	174,815	5.4

Source: U.S. Bureau of Labor Statistics.

[2]Data provided are for the Washington-Arlington-Alexandria, DC-VA-MD-WV Metropolitan Division, which encompasses the following regions: Alexandria City, VA; Arlington County, VA; Calvert County, MD; Charles County, MD; Clarke County, VA; District of Columbia; Fairfax City, VA; Fairfax County, VA; Falls Church City, VA; Fauquier County, VA; Fredericksburg City, VA; Jefferson County, WV; Loudoun County, VA; Manassas City, VA; Manassas Park City, VA; Prince George's County, MD; Prince William County, VA; Spotsylvania County, VA; Stafford County, VA; and Warren County, VA

Table 1.8 and Figure1.4 (next page) present a comparison of the unemployment rates in the Washington metropolitan area[3] to those of the United States as a whole from 2000 to 2013. By 2013 in both regions, the unemployment rates decreased from their highest point in 2010, but have increased overall from 2000.

From 2010 to 2013, the unemployment rate in the Washington metropolitan area decreased from 6.5 to 5.4 percent and the national rate has decreased from 9.6 to 7.4 percent. In every year from 2000 to 2013, the Washington metropolitan area has maintained a lower unemployment rate than the national average.

Table 1.8. Unemployment Rates for Washington Metropolitan Area and the United States: 2000 through 2013

Year	Unemployment Rate (%)	
	Washington Metropolitan Area	United States
2000	2.7	4.0
2001	3.4	4.7
2002	4.0	5.8
2003	3.9	6.0
2004	3.7	5.5
2005	3.4	5.1
2006	3.1	4.6
2007	2.9	4.6
2008	3.7	5.8
2009	6.2	9.3
2010	6.5	9.6
2011	6.1	8.9
2012	5.7	8.1
2013	5.4	7.4

Source: U.S. Bureau of Labor Statistics

[3]Data provided are for the Washington-Arlington-Alexandria, DC-VA-MD-WV Metropolitan Division, which encompasses the following regions: Alexandria City, VA; Arlington County, VA; Calvert County, MD; Charles County, MD; Clarke County, VA; District of Columbia; Fairfax City, VA; Fairfax County, VA; Falls Church City, VA; Fauquier County, VA; Fredericksburg City, VA; Jefferson County, WV; Loudoun County, VA; Manassas City, VA; Manassas Park City, VA; Prince George's County, MD; Prince William County, VA; Spotsylvania County, VA; Stafford County, VA; and Warren County, VA

Figure 1.4. Unemployment Rates for Washington Metropolitan Area and the United States: 2000 through 2013

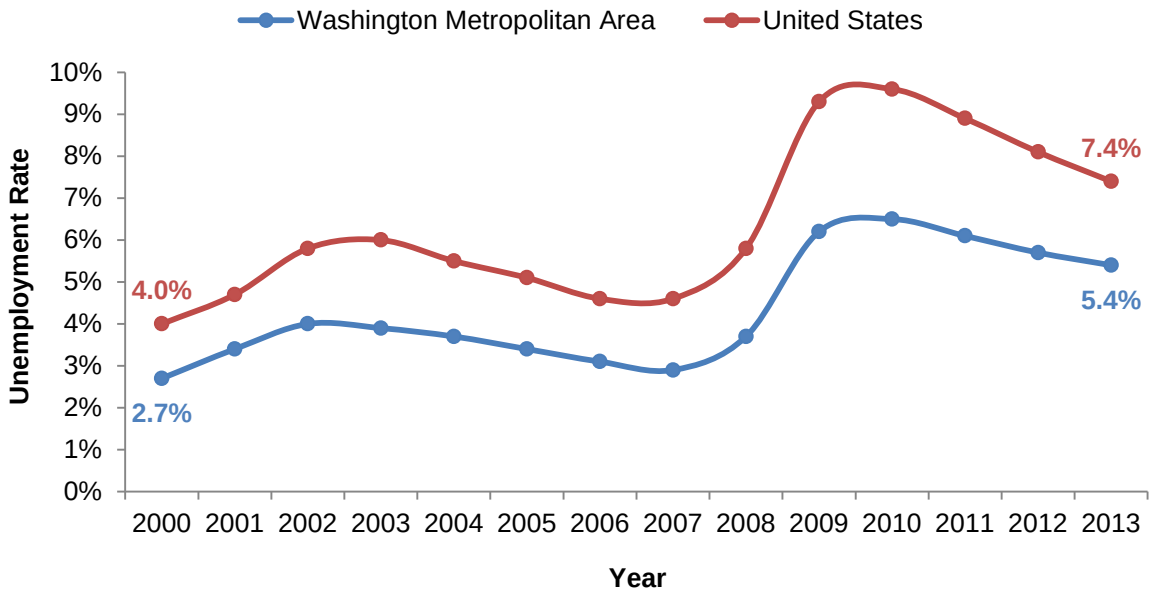


Table 1.9 (next page) and Figures 1.5 and 1.6 (following page) present data on employment by industry for the Washington metropolitan area in 2001, in 2012, and projections for 2021. Between 2001 and 2012, overall job growth in the Washington metropolitan area increased by 9 percent, and is projected to further increase by 11 percent between 2012 and 2021. In 2001 and 2012, the largest proportion of Washington metropolitan area workers were employed in government jobs (22 percent in 2001 and 24 percent in 2012). This trend is projected to continue to 2021 with 22 percent of jobs expected to be in government. The second largest proportion of Washington metropolitan area workers were employed in the professional, scientific, and technical services industry. This industry grew from 14 percent of area employment in 2001 to 17 percent in 2012, and is projected to grow to 18 percent by 2021. Retail trade was the third largest industry in 2001 at 9 percent, but decreased to fourth largest in 2012 (8 percent) and is projected to remain at 8 percent in 2021 (fifth place for this time period). The proportion of area workers employed in the health care and social assistance industry increased by 1 percentage point from 2001 to 2012 (from 8 to 9 percent) and is projected to account for 10 percent of area employment by 2021, making it the third largest industry by employment in 2021.

The three industries in the area that are projected to show the greatest increase in the number of jobs between 2012 and 2021 are professional, scientific, and technical services (approximately 80,000); health care and social assistance (about 58,000), and accommodation and food services (approximately 33,000) (Figure 1.6 on following page).

Table 1.9. Employment by Industry for Washington Metropolitan Area: 2001, 2012, and 2021

Industry	2001		2012		% Change from 2001 to 2012	2021*		% Change from 2012 to 2021*
	#	%	#	%		#	%	
Accommodation and Food Services	167,441	6.9	206,579	7.9	23.4	239,899	8.2	16.1
Administrative and Support and Waste Management and Remediation Services	161,471	6.7	163,089	6.2	1.0	178,320	6.1	9.3
Agriculture, Forestry, Fishing and Hunting	1,161	<0.1	889	<0.1	-23.4	681	<0.1	-23.4
Arts, Entertainment, and Recreation	26,150	1.1	33,360	1.3	27.6	40,252	1.4	20.7
Construction	135,575	5.6	119,059	4.5	-12.2	143,076	4.9	20.2
Educational Services (Private)	52,653	2.2	74,956	2.9	42.4	99,243	3.4	32.4
Finance and Insurance	79,415	3.3	75,545	2.9	-4.9	80,031	2.7	5.9
Government	535,270	22.1	617,798	23.5	15.4	632,941	21.7	2.5
Health Care and Social Assistance	182,241	7.5	237,728	9.0	30.4	295,677	10.1	24.4
Information	125,576	5.2	71,176	2.7	-43.3	66,125	2.3	-7.1
Management of Companies and Enterprises	27,730	1.1	39,972	1.5	44.1	42,812	1.5	7.1
Manufacturing	59,665	2.5	39,912	1.5	-33.1	32,082	1.1	-19.6
Mining, Quarrying, and Oil and Gas Extraction	702	<0.1	688	<0.1	-2.0	668	<0.1	-2.9
Other Services (except Public Administration)	129,770	5.4	150,566	5.7	16.0	169,033	5.8	12.3
Professional, Scientific, and Technical Services	348,720	14.4	437,082	16.6	25.3	517,003	17.7	18.3
Real Estate and Rental and Leasing	47,854	2.0	45,885	1.7	-4.1	49,222	1.7	7.3
Retail Trade	215,401	8.9	216,136	8.2	0.3	233,668	8.0	8.1
Transportation and Warehousing	52,006	2.2	42,966	1.6	-17.4	44,190	1.5	2.8
Unclassified Industry	8,849	0.4	2,279	0.1	-74.2	1,547	0.1	-32.1
Utilities	7,015	0.3	5,725	0.2	-18.4	5,697	0.2	-0.5
Wholesale Trade	53,728	2.2	46,970	1.8	-12.6	46,800	1.6	-0.4
Total	**2,418,393**	**100.0**	**2,628,360**	**100.0**	**8.7**	**2,918,967**	**100.0**	**11.1**

Source: EMSI, Table 2014.2 – QCEW Employees
*EMSI Projections

Figure 1.5. Top 10 Industries in Washington Metropolitan Area by Number of Jobs: 2012

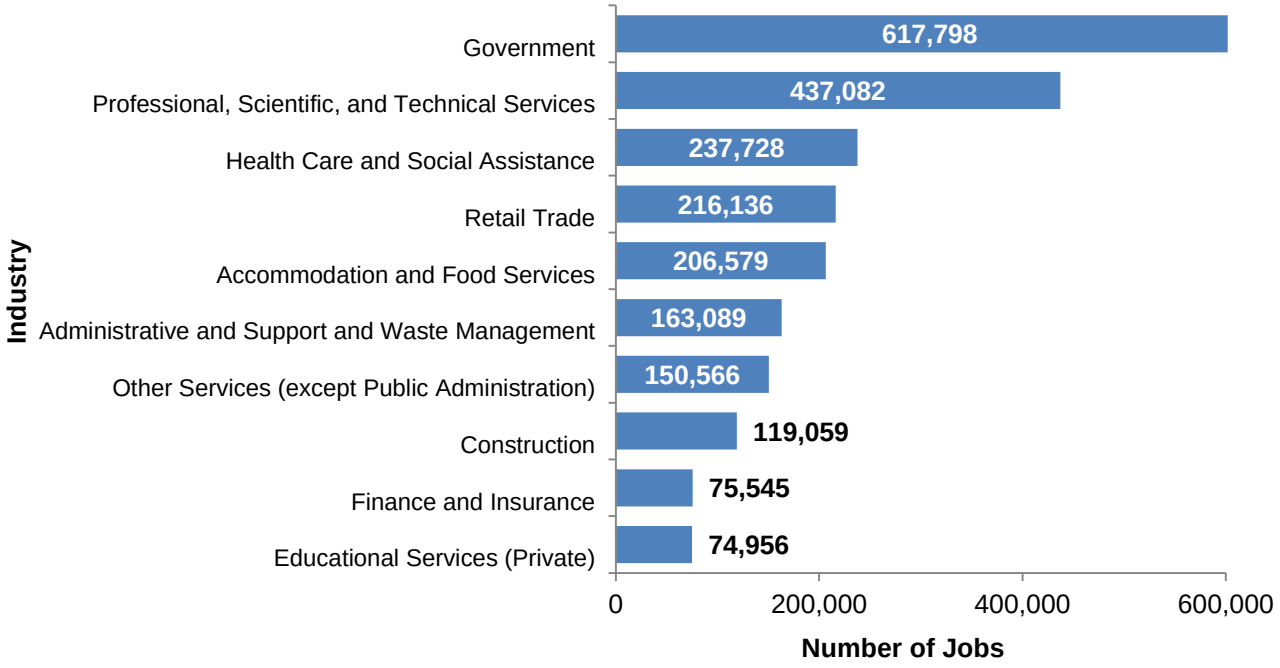


Figure 1.6. Projected Number of New Jobs in the Washington Metropolitan Area by Industry from 2012 to 2021

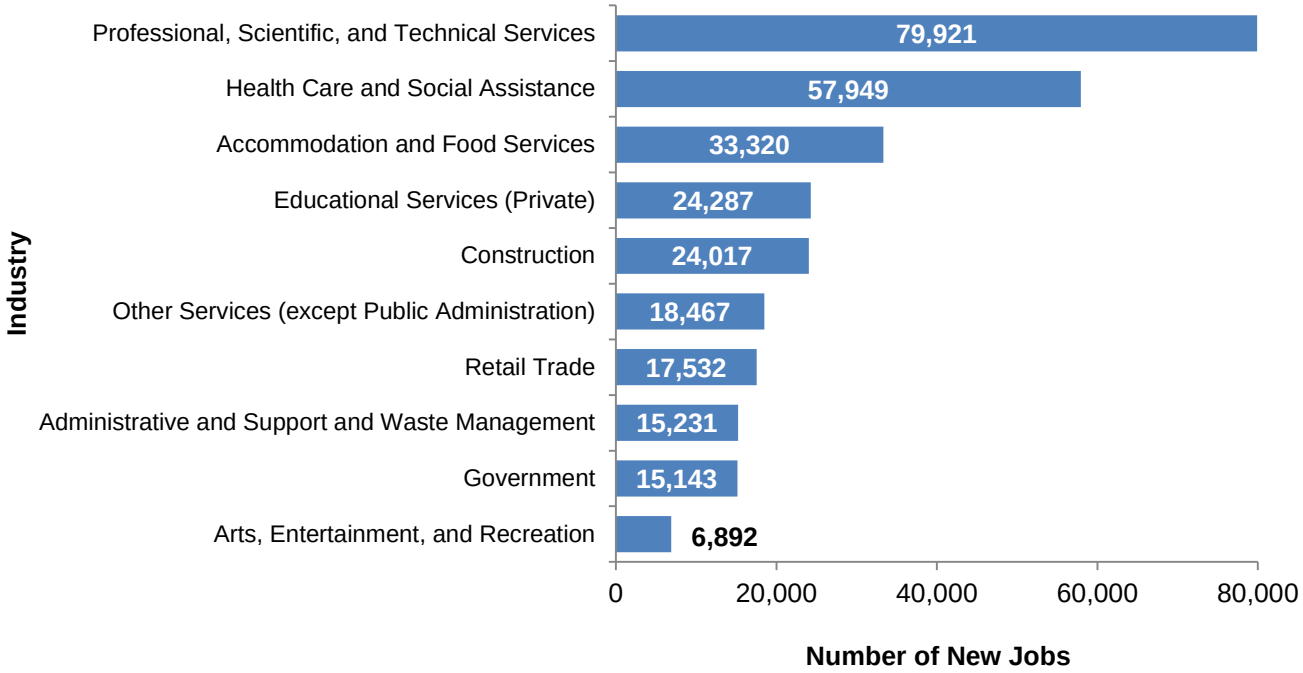


Table 1.10 (next page) and Figures 1.7 and 1.8 (following page) display employment data by occupation for the Washington metropolitan area in 2001, 2012, and projections for 2021. In 2001 and 2012, the largest proportion of Washington metropolitan area workers were employed in office and administrative support occupations (16 and 14 percent, respectively). Office and administrative support occupations are projected to be the highest proportion of workers in 2021 (13 percent). Occupations related to business and finance constituted the second largest proportion of Washington metropolitan area workers in 2001 (10 percent), 2012 (11 percent), and is projected to be 11 percent in 2021. Sales and related occupations was the third largest in 2001 (9 percent), but decreased to a tie for fourth largest in 2012 at just below 8 percent and is projected to remain at 8 percent in 2021. Management occupations, on the other hand, will remain consistent at 8 percent of area workers and are predicted to be the third largest occupation in 2021.

The three occupations in the area that are projected to show the greatest increase in the number of jobs between 2012 and 2021 are occupations related to transportation and material moving, food preparation and serving related, and education, training, and library (Figure 1.8 on following page). Occupations in transportation and material moving are projected to increase by approximately 41,000 jobs. Food preparation and serving-related occupations are expected to increase by approximately 34,000 jobs while occupations related to education, training, and library are expected to increase by 28,000 jobs.

Table 1.10. Employment by Occupation in Washington Metropolitan Area: 2001, 2012, and 2021

Employment by Occupation	2001		2012		% Change from 2001 to 2012	2021*		% Change from 2012 to 2021*
	#	%	#	%		#	%	
Architecture and Engineering	65,287	2.7	67,206	2.6	2.9	91,531	3.1	36.2
Arts, Design, Entertainment, Sports, and Media	56,512	2.3	61,130	2.3	8.2	58,453	2.0	-4.4
Building and Grounds Cleaning and Maintenance	90,198	3.7	97,116	3.7	7.7	104,308	3.6	7.4
Business and Financial	233,811	9.7	280,487	10.7	20.0	306,083	10.5	9.1
Community and Social Service	27,417	1.1	33,850	1.3	23.5	40,116	1.4	18.5
Computer and Mathematical	174,234	7.2	208,134	7.9	19.5	224,043	7.7	7.6
Construction and Extraction	97,889	4.0	87,766	3.3	-10.3	109,243	3.7	24.5
Education, Training, and Library	120,361	5.0	145,370	5.5	20.8	173,528	5.9	19.4
Farming, Fishing, and Forestry	1,938	0.1	1,652	0.1	-14.8	1,640	0.1	-0.7
Food Preparation and Serving Related	152,810	6.3	193,781	7.4	26.8	227,736	7.8	17.5
Healthcare Practitioners and Technical	98,911	4.1	119,155	4.5	20.5	105,584	3.6	-11.4
Healthcare Support	39,721	1.6	52,040	2.0	31.0	46,216	1.6	-11.2
Installation, Maintenance, and Repair	85,174	3.5	74,603	2.8	-12.4	86,123	3.0	15.4
Legal	60,540	2.5	66,830	2.5	10.4	68,920	2.4	3.1
Life, Physical, and Social Science	45,796	1.9	54,585	2.1	19.2	65,218	2.2	19.5
Management	186,555	7.7	213,059	8.1	14.2	236,647	8.1	11.1
Office and Administrative Support	375,217	15.5	364,245	13.9	-2.9	388,775	13.3	6.7
Personal Care and Service	61,043	2.5	76,334	2.9	25.0	69,746	2.4	-8.6
Production	57,880	2.4	45,956	1.7	-20.6	65,866	2.3	43.3
Protective Service	63,005	2.6	79,028	3.0	25.4	81,677	2.8	3.4
Sales and Related	220,531	9.1	208,031	7.9	-5.7	228,340	7.8	9.8
Transportation and Material Moving	103,562	4.3	98,001	3.7	-5.4	139,174	4.8	42.0
Total	**2,418,392**	**100.0**	**2,628,359**	**100.0**	**8.7**	**2,918,967**	**100.0**	**11.1**

Source: EMSI, Table 2014.2 – QCEW Employees
*EMSI Projections

Figure 1.7. Top 10 Occupations in Washington Metropolitan Area by Number of Jobs: 2012

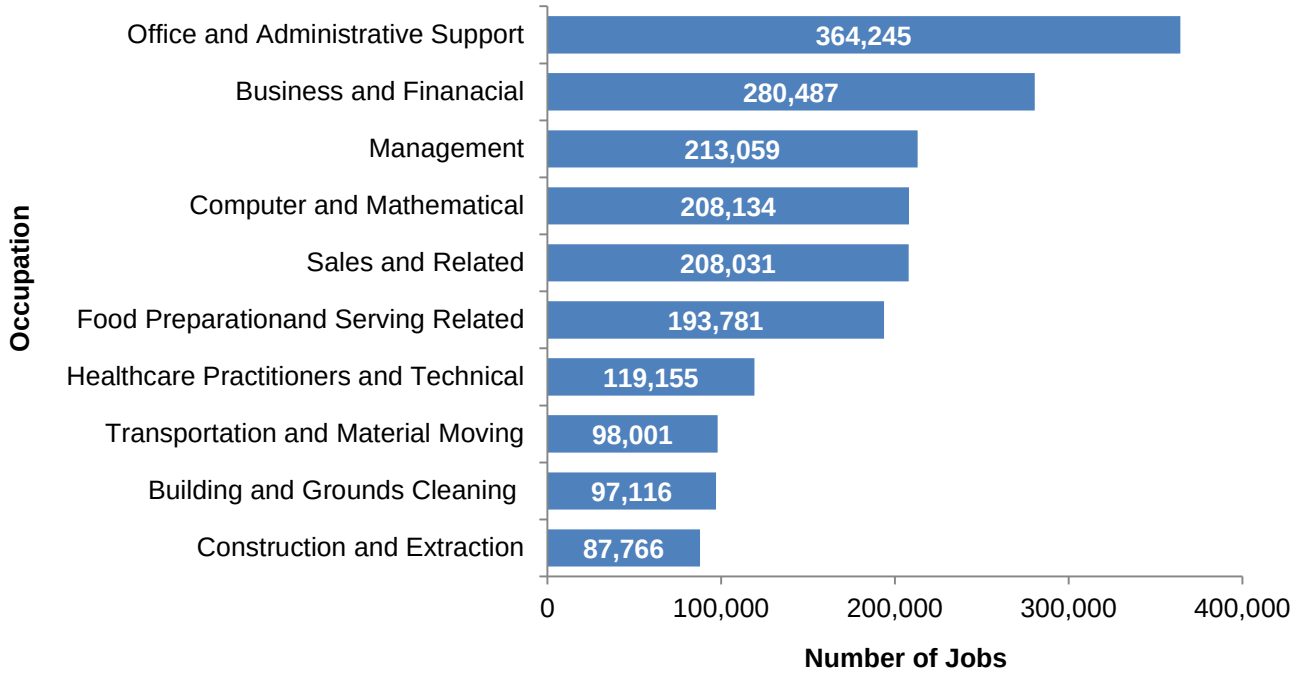
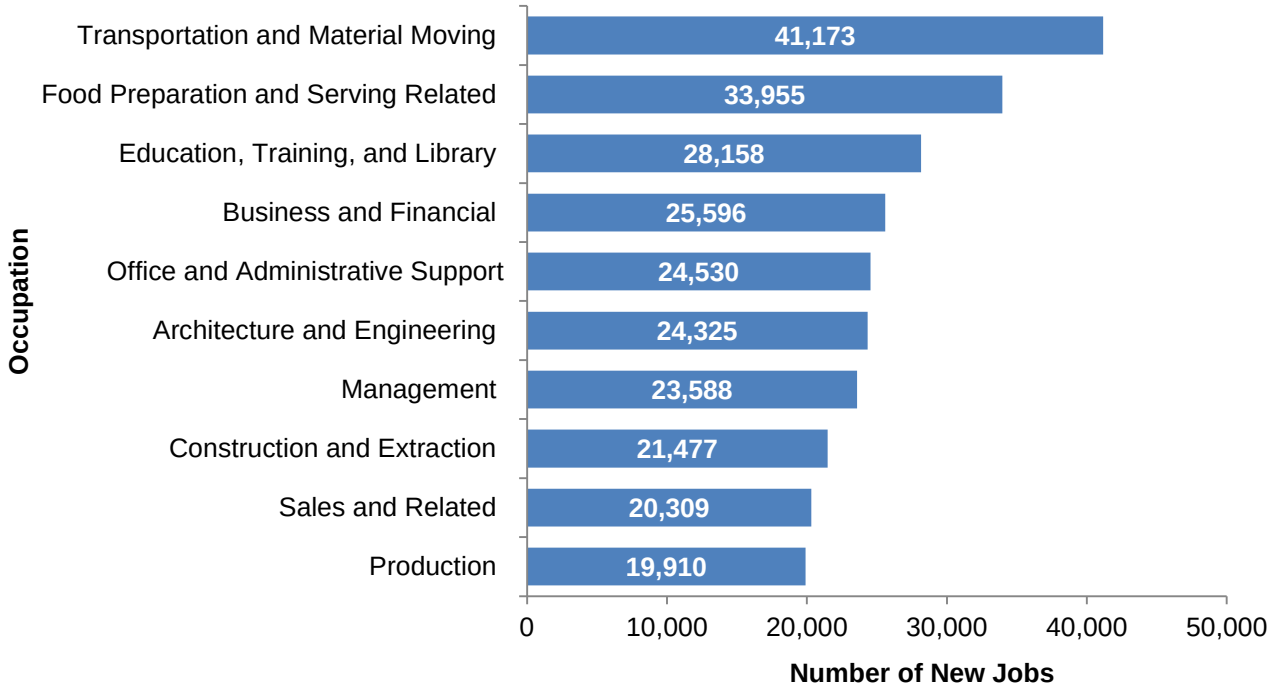


Figure 1.8. Projected Number of New Jobs in the Washington Metropolitan Area by Occupation from 2012 to 2021



IV. Regional Employer Profile

According to the 2014 *Fortune 500* report, the Washington metropolitan area was home to 16 *Fortune 500* companies, of which over half were in Fairfax County (Table 1.11). Fannie Mae was the highest ranked Washington area company (No. 13 on the full list) followed by Freddie Mac (No. 32). Lockheed Martin was the third highest locally ranked company (No. 59). Additionally, "since 2008, five new corporate headquarters – CSC, Volkswagen Group of America, Hilton Worldwide, SAIC, and Northrup Grumman – have moved here, more than anywhere else in the country" (Greater Washington Bureau of Trade [BOT], p. 4).

Table 1.11. Fortune 500 Companies in the Washington Metropolitan Area: 2014

Fortune 500 Company	Location	Ranking
Fannie Mae	Washington, D.C.	13
Freddie Mac	Fairfax County	32
Lockheed Martin Corp.	Montgomery County	59
General Dynamics Corp.	Fairfax County	99
Northrup Grumman Corp.	Fairfax County	122
Capital One Financial Corp.	Fairfax County	124
The AES Corp.	Arlington County	174
Computer Science Corp.	Fairfax County	185
Marriott International, Inc.	Montgomery County	219
Hilton Worldwide Holdings, Inc.	Fairfax County	289
Leidos Holdings Inc.	Fairfax County	442
Booz Allen Hamilton Holding Corp.	Fairfax County	443
Discovery Communications, Inc.	Montgomery County	460
Host Hotels and Resorts, Inc.	Montgomery County	477
Gannett Co., Inc.	Fairfax County	481
NII Holdings, Inc.	Fairfax County	495

Source: Washington Business Journal

V. Federal Government Procurement

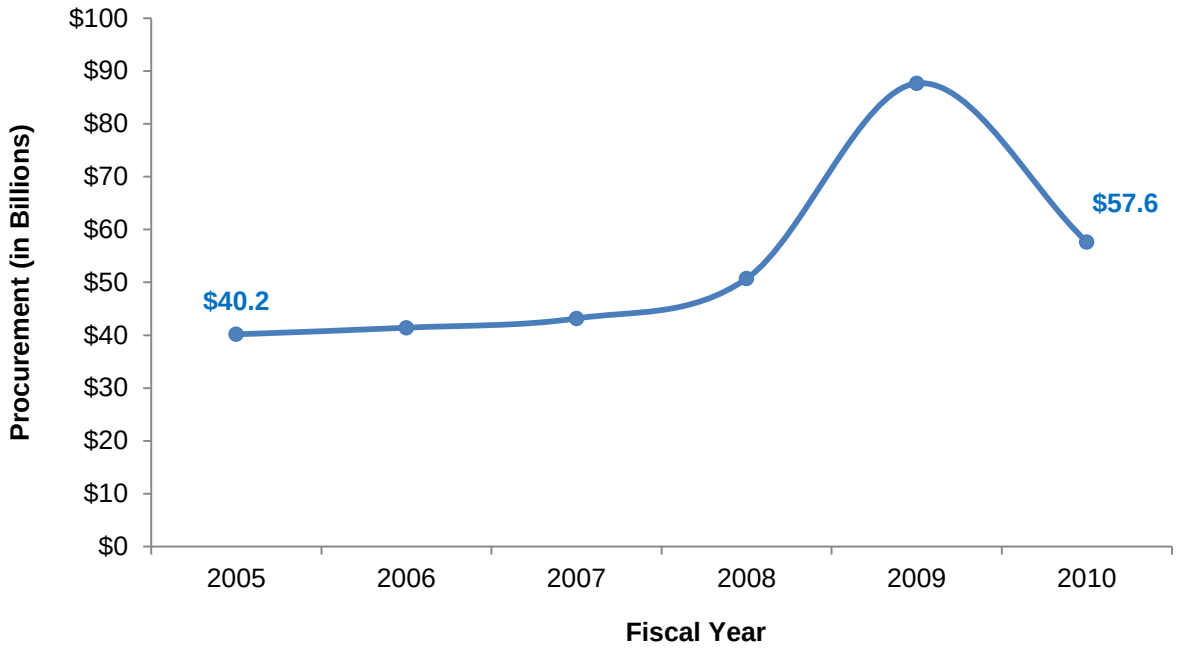
Table 1.12 and Figure 1.9 (both next page) present data on federal government procurement from firms located in the Washington metropolitan area for fiscal years 2005 through 2010. Total federal government procurement for firms located in the Washington metropolitan area increased 44 percent between 2005 and 2010.

Table 1.12. Federal Government Procurement in the Washington Metropolitan Area: Fiscal Years 2005 through 2010 (in U.S. Dollars)

Jurisdiction	Year						% Change 2005 to 2010
	2005	2006	2007	2008	2009	2010	
Washington Metropolitan Area	40,170,660,000	41,419,857,000	43,183,014,000	50,721,924,000	87,655,081,000	57,645,680,000	43.5

Source: U.S. Census Bureau, Consolidated Federal Funds Report (CFFR) 2005 to 2010
Federal Financial Statistics program was terminated in 2012; therefore, the CFFR 2010 is the most recent available report
Amounts are not adjusted for inflation

Figure 1.9. Federal Government Procurement in the Washington Metropolitan Area: Fiscal Years 2005 through 2010 (in Billions of U.S. Dollars)



VI. Venture Capital

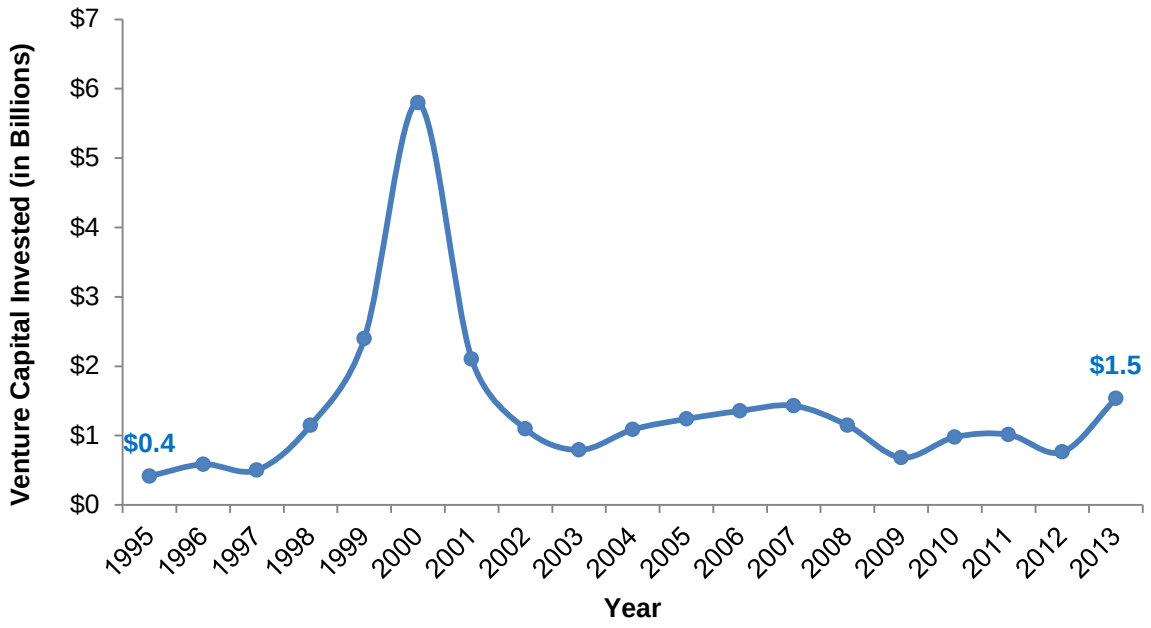
Table 1.13 and Figure 1.10 (both next page) provide data on venture capital investment in the Washington metropolitan area. Venture capital is money invested, often through private partnerships, in entrepreneurial ventures with high growth expectations over a period of a few years. Venture capital is commonly used as an indicator of the region's growth potential. Typically, firms will only receive venture capital if they are expected to grow substantially in the future. While venture capital investment in the Washington metropolitan area fluctuated with the changing economy between 1995 and 2013, total dollar investment in the region during 2013 ($1,533,673,900) was the highest since 2001.

Table 1.13. Venture Capital Investment in the Washington Metropolitan Area: 1995 through 2013

Year	$ Amount Invested
1995	415,168,000
1996	585,460,400
1997	502,383,500
1998	1,148,718,600
1999	2,395,136,900
2000	5,795,223,800
2001	2,103,055,100
2002	1,096,587,600
2003	791,945,400
2004	1,086,600,500
2005	1,238,768,800
2006	1,355,275,500
2007	1,429,522,600
2008	1,148,382,900
2009	682,758,600
2010	977,233,600
2011	1,013,954,200
2012	762,970,100
2013	1,533,673,900

Source: PricewaterhouseCoopers/National Venture Capital Association *MoneyTree*™ Report; region is reported as "DC/Metroplex"

Figure 1.10. Venture Capital Investment in the Washington Metropolitan Area: 1995 through 2013 (in Billions of U.S. Dollars)



VII. Price-Level Increases

Table 1.14 and Figure 1.11 (next page) present annual inflation data for the Washington metropolitan area[4] and across the United States. Inflation is a measure used to gauge the increase in the price level experienced by consumers for day-to-day living expenses. The data indicates that inflation in the Washington metropolitan region has ranged from 0.2 percent (2009) to 4.5 percent (2008) and was at 1.5 percent in 2013. Inflation in the Washington metropolitan region was slightly higher than the U.S. city average from 2002 to 2012.

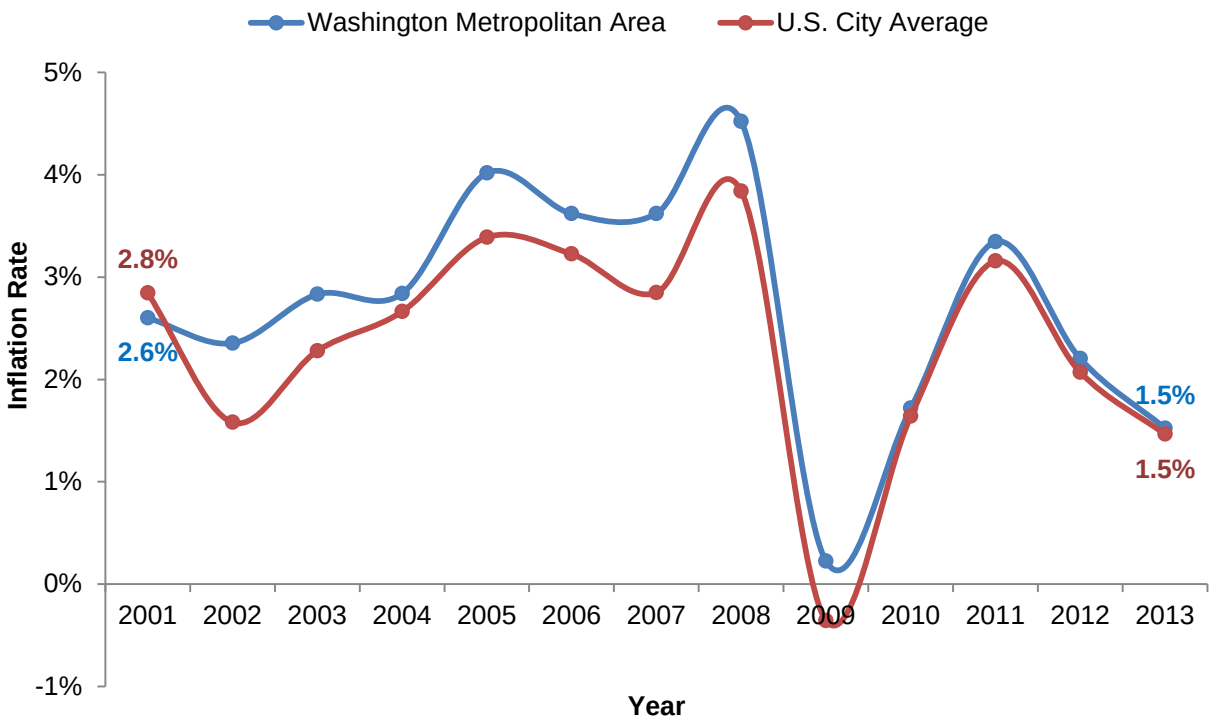
Table 1.14. Annual Inflation in the Washington Metropolitan Area: 2001 through 2013

Year	Washington Metropolitan Area Inflation	U.S. City Average Inflation
2001	2.6	2.8
2002	2.4	1.6
2003	2.8	2.3
2004	2.8	2.7
2005	4.0	3.4
2006	3.6	3.2
2007	3.6	2.8
2008	4.5	3.8
2009	0.2	-0.4
2010	1.7	1.6
2011	3.3	3.2
2012	2.2	2.1
2013	1.5	1.5

Source: U.S. Bureau of Labor Statistics
Note: Consumer Price Indexes (CPI) – All Urban Consumers; Not Seasonally Adjusted

[4]Consumer Price Indexes (CPI) data provided are for the Washington-Arlington-Alexandria, DC-VA-MD-WV Metropolitan Division, which encompasses the following regions: Alexandria City, VA; Arlington County, VA; Calvert County, MD; Charles County, MD; Clarke County, VA; District of Columbia; Fairfax City, VA; Fairfax County, VA; Falls Church City, VA; Fauquier County, VA; Fredericksburg City, VA; Jefferson County, WV; Loudoun County, VA; Manassas City, VA; Manassas Park City, VA; Prince George's County, MD; Prince William County, VA; Spotsylvania County, VA; Stafford County, VA; and Warren County, VA.

Figure 1.11. Annual Inflation in the Washington Metropolitan Area: 2001 through 2013



VIII. Income

Tables 1.15 and 1.16 (both next page) present the 1999 and 2012 annual per capita and median household income levels for jurisdictions within the Washington metropolitan area. Figures for 1999 have been converted to 2012 constant dollars to adjust for inflation. Between 1999 and 2012, the annual per capita income levels in Washington, D.C. increased the greatest (20 percent) as compared to other jurisdictions in Northern Virginia and Maryland. In Northern Virginia, annual per capita income in all jurisdictions increased between 1999 and 2012, with the exception of Manassas City and Manassas Park City. Arlington County saw the largest increase in annual per capita income (19 percent). In contrast, annual per capita income in Manassas City decreased 11 percent over this time period while Manassas Park City saw a decrease of 1 percent.

Changes in median household income followed similar patterns. Median household income in Washington, D.C. and most jurisdictions in Virginia increased between 1999 and 2012. The growth in median household income was also generally higher than that of annual per capita income. Falls Church City saw the largest increase in median household income (25 percent), followed by Arlington County (21 percent). Manassas City and Manassas Park City saw decreases in median household income between 1999 and 2012 (-11 and -10 percent, respectively). Prince George's County in Maryland also saw a decline in median household income over this time period (-4 percent).

Table 1.15. Annual Per Capita Income for Washington Metropolitan Area Residents: 1999 and 2012

Jurisdiction	Annual Per Capita Income ($)		% Change from 1999 to 2012
	1999*	2012	
Washington D.C.	37,641	45,307	20.4
Virginia Region			
Alexandria City	49,449	52,160	5.5
Arlington County	49,529	58,906	18.9
Fairfax City	41,044	43,910	7.0
Fairfax County	48,454	49,572	2.3
Falls Church City	53,922	57,784	7.2
Loudoun County	44,043	45,507	3.3
Manassas City	32,120	28,632	-10.9
Manassas Park City	27,648	27,306	-1.2
Prince William County	33,681	37,157	10.3
Maryland Region			
Montgomery County	46,868	47,067	0.4
Prince George's County	30,681	31,110	1.4

Sources: U.S. Census Bureau, Census 2000, Table DP-3;
U.S. Census Bureau, 2012 American Community Survey, Table DP03
*U.S. Dollars for 1999 were converted to 2012 constant U.S. Dollars using the BEA Implicit Price Deflator

Table 1.16. Median Annual Household Income for Washington Metropolitan Area Residents: 1999 and 2012

Jurisdiction	Median Household Income ($)		% Change from 1999 to 2012
	1999*	2012	
Washington D.C.	52,703	66,583	26.3
Virginia Region			
Alexandria City	73,630	81,160	10.2
Arlington County	82,755	100,474	21.4
Fairfax City	88,851	94,496	6.4
Fairfax County	106,463	107,096	0.6
Falls Church City	98,416	122,844	24.8
Loudoun County	105,935	117,876	11.3
Manassas City	79,350	70,634	-11.0
Manassas Park City	79,856	71,810	-10.1
Prince William County	86,642	96,160	11.0
Maryland Region			
Montgomery County	93,976	94,965	1.1
Prince George's County	72,574	69,879	-3.7

Sources: U.S. Census Bureau, Census 2000, Table DP-3;
U.S. Census Bureau, 2012 American Community Survey, Table DP03
*U.S. Dollars for 1999 were converted to 2012 constant U.S. Dollars using the BEA Implicit Price Deflator

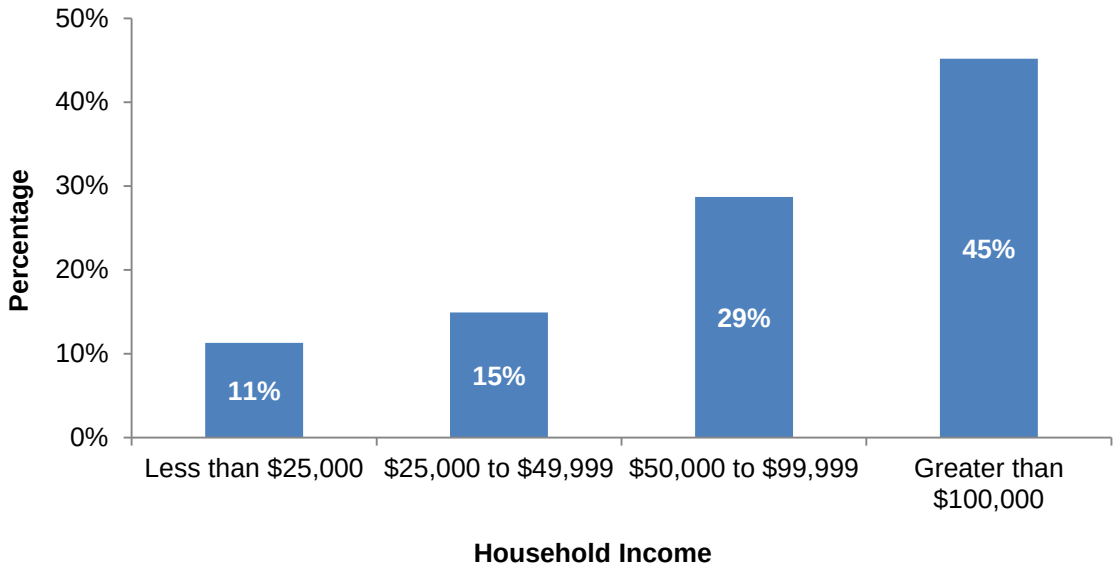
Table 1.17 and Figure 1.12 present the distribution of annual household income levels for the Washington metropolitan area in 2012. In 2012, the largest proportion of the region's households had annual income levels between $100,000 and $149,999 (19 percent). Approximately 45 percent of households reported annual incomes of $100,000 and over, while 11 percent reported an annual income of less than $25,000.

Table 1.17. Annual Household Income Distribution for Washington Metropolitan Area Residents: 2012

Household Income and Benefits	Washington Metropolitan Residents	
	#	%
Less than $10,000	71,760	4.1
$10,000 to $14,999	38,695	2.2
$15,000 to $24,999	87,427	5.0
$25,000 to $34,999	96,632	5.5
$35,000 to $49,999	164,452	9.4
$50,000 to $74,999	272,952	15.6
$75,000 to $99,999	229,740	13.1
$100,000 to $149,999	339,608	19.4
$150,000 to $199,999	202,890	11.6
Greater than $200,000	247,115	14.1
Total Households	**1,751,271**	**100.0**

Source: U.S. Census Bureau, 2012 American Community Survey, Table DP03

Figure 1.12. Annual Household Income Distribution for Washington Metropolitan Area Residents: 2012



IX. Real Estate

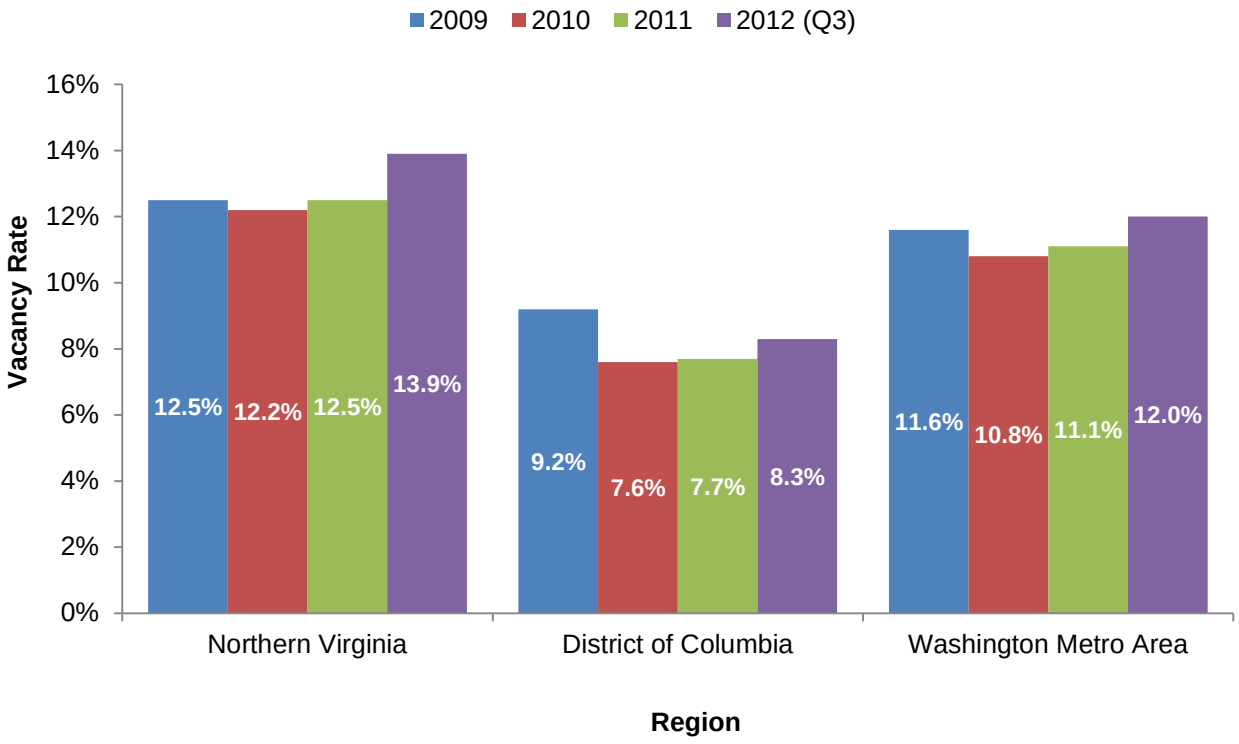
Table 1.18 and Figure 1.13 present data on office vacancy rates in the Washington metropolitan area for 2009, 2010, 2011, and 2012 (3rd Quarter). In the Washington metropolitan area, office vacancy rates ranged from 11 to 12 percent. For all years presented, office vacancy rates were higher in Northern Virginia than in the District of Columbia. Vacancy rates ranged from 12 to 14 percent in Northern Virginia and 8 to 9 percent in the District of Columbia.

Table 1.18. Office Vacancy Rates in the Washington Metropolitan Area: 2009 through 2012 (Q3)

Region	2009	2010	2011	2012 (Q3)
	%	%	%	%
Northern Virginia	12.5	12.2	12.5	13.9
District of Columbia	9.2	7.6	7.7	8.3
Washington Metro Area*	11.6	10.8	11.1	12.0

Source: Delta Associates, CoStar
*Includes Washington, D.C., Alexandria City, Arlington County, Fairfax County, Fairfax City, Falls Church City, Loudoun County, Prince William County, Frederick County (MD), Montgomery County (MD), and Prince George's County (MD).

Figure 1.13. Office Vacancy Rates in the Washington Metropolitan Area: 2009 through 2012 (Q3)



The number and median price of existing housing units sold in the Washington metropolitan area between 2000 and 2011 are presented in Table 1.19 (below) and Figures 1.14 and 1.15 (next page). At the time of publication, existing home sales data was the best available information for the entire Washington metropolitan area. Data provided for specific regions in Northern Virginia in subsequent chapters of the report present total home sales (new and existing) in each region. The number of existing home sales in the region decreased 28 percent between 2000 and 2011. In 2011, it was the second lowest in this 12-year time period.

Between 2000 and 2005, the median price of existing home sales in the Washington metropolitan area increased from around $148,000 to $454,000 (207 percent). Median prices decreased by 31 percent between 2005 and 2009, but began increasing again in 2010.

In 2014, “the Washington, D.C. Metro Area continues to have lower levels of buyer activity than in 2013. Closed sales have now decreased from their prior year during every month in 2014, and decreased 8.4 percent from last July,” (Real Estate Business Intelligence, p. 1). While closed sales decreased for all property segments, there was a mild increase in median sales price; the slight increase in home prices were based on townhomes and condo properties. According to Real Estate Business Intelligence, “The median sales price increased modestly from last year, rising 0.7 percent. This increase was driven by townhomes and condo properties, with condos reaching their highest July-level since 2007, and townhomes reaching their highest level on record, with data starting in 1997” (REBI, p. 1).

Table 1.19. Number and Median Price of Existing Home Sales for the Washington Metropolitan Area: 2000 through 2011

Year	# of Units Sold	Median Price*
2000	82,000	147,600
2001	92,000	245,430
2002	98,000	281,800
2003	107,000	320,340
2004	117,000	379,020
2005	114,000	453,710
2006	85,000	444,550
2007	66,000	427,740
2008	59,000	344,590
2009	65,000	313,030
2010	63,000	323,550
2011	60,000	318,000
% Change from 2000 to 2011	**-27.8**	**115.4**

Sources: Real Estate Business Intelligence, George Mason University Center for Regional Analysis; Region is reported as “Washington, D.C. Metropolitan Area”
*All historical median prices have been converted to 2011 constant U.S. Dollars

Figure 1.14. Number of Existing Home Sales for the Washington Metropolitan Area: 2000 through 2011

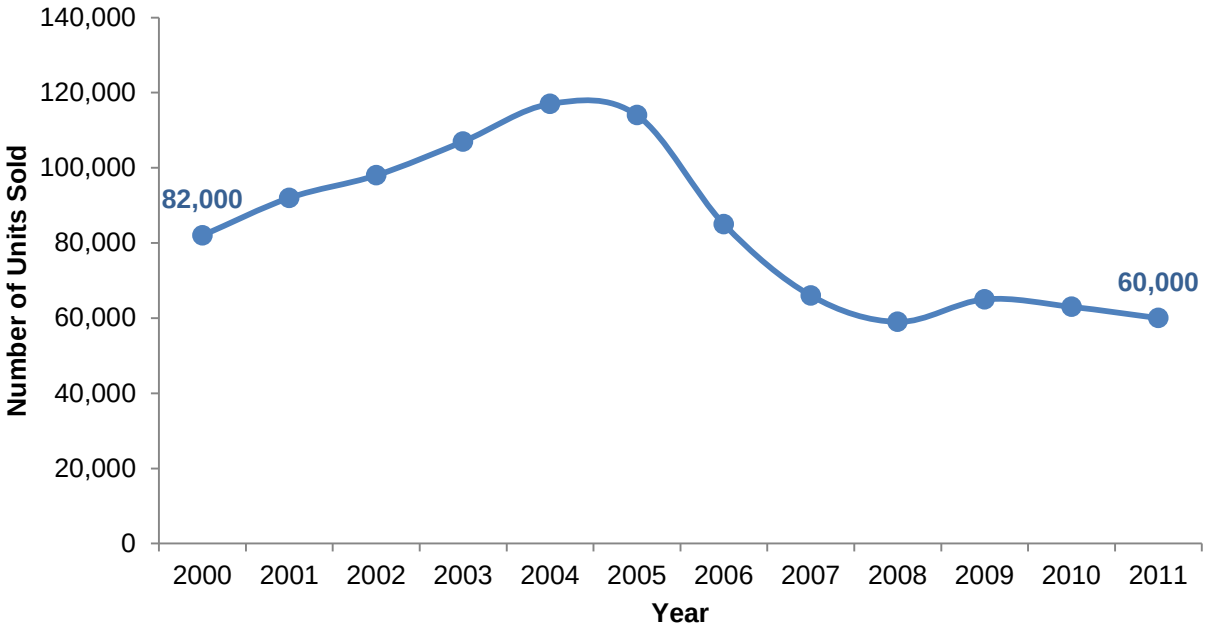


Figure 1.15. Median Price of Existing Home Sales for the Washington Metropolitan Area: 2000 through 2011

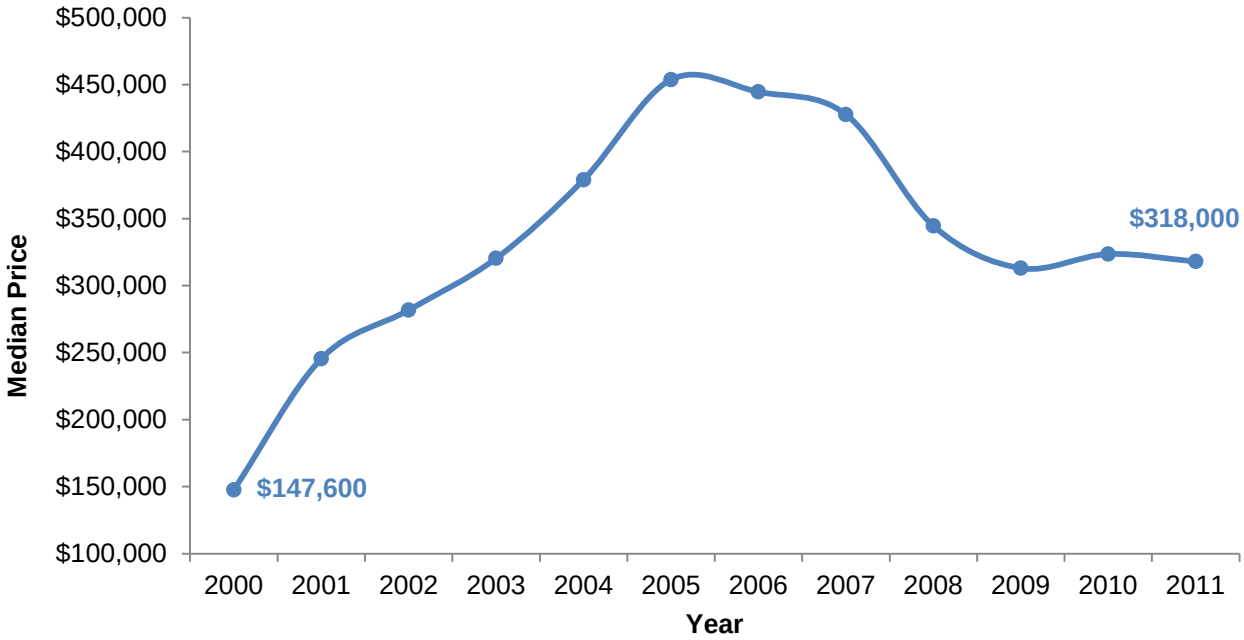


Table 1.20 and Figures 1.16 and 1.17 (next page) present data on the number of permits issued for new privately owned housing in the Washington metropolitan area[5]. Permit data are an important economic indicator because they provide a look forward into the housing market. The number of permits issued in the Washington metropolitan area between 2004 and 2013 exhibits two distinct trends – a decrease each year from 2004 through 2009 and an annual increase from 2010 to 2013. In 2013, a total of 24,033 permits were issued. However, the number of permits issued in 2013 still remains considerably lower than the number issued in 2004 (38,024). The valuation of the units authorized has followed a similar overall trend. In 2013, the valuation of new privately owned housing units authorized in the area was in excess of $3.5 billion, which is lower than in 2004 ($4.7 billion).

Table 1.20. Permits Issued for New Privately Owned Housing in Washington Metropolitan Area: 2004 through 2013

Year	Units Authorized	Valuation ($)
2004	38,024	4,789,871,000
2005	36,776	5,237,140,000
2006	27,958	4,372,546,000
2007	22,459	3,756,550,000
2008	13,732	2,112,894,000
2009	12,329	2,032,074,000
2010	13,065	2,104,284,000
2011	19,657	2,937,160,000
2012	22,404	3,330,091,000
2013	24,033	3,553,935,000

Source: U.S. Census Bureau Building Permits Survey

[5]Data provided are for the Washington-Arlington-Alexandria, DC-VA-MD-WV Metropolitan Division, which encompasses the following regions: Alexandria City, VA; Arlington County, VA; Calvert County, MD; Charles County, MD; Clarke County, VA; District of Columbia; Fairfax City, VA; Fairfax County, VA; Falls Church City, VA; Fauquier County, VA; Fredericksburg City, VA; Jefferson County, WV; Loudoun County, VA; Manassas City, VA; Manassas Park City, VA; Prince George's County, MD; Prince William County, VA; Spotsylvania County, VA; Stafford County, VA; and Warren County, VA

Figure 1.16. Permits Issued for New Privately Owned Housing in Washington Metropolitan Area: 2004 through 2013

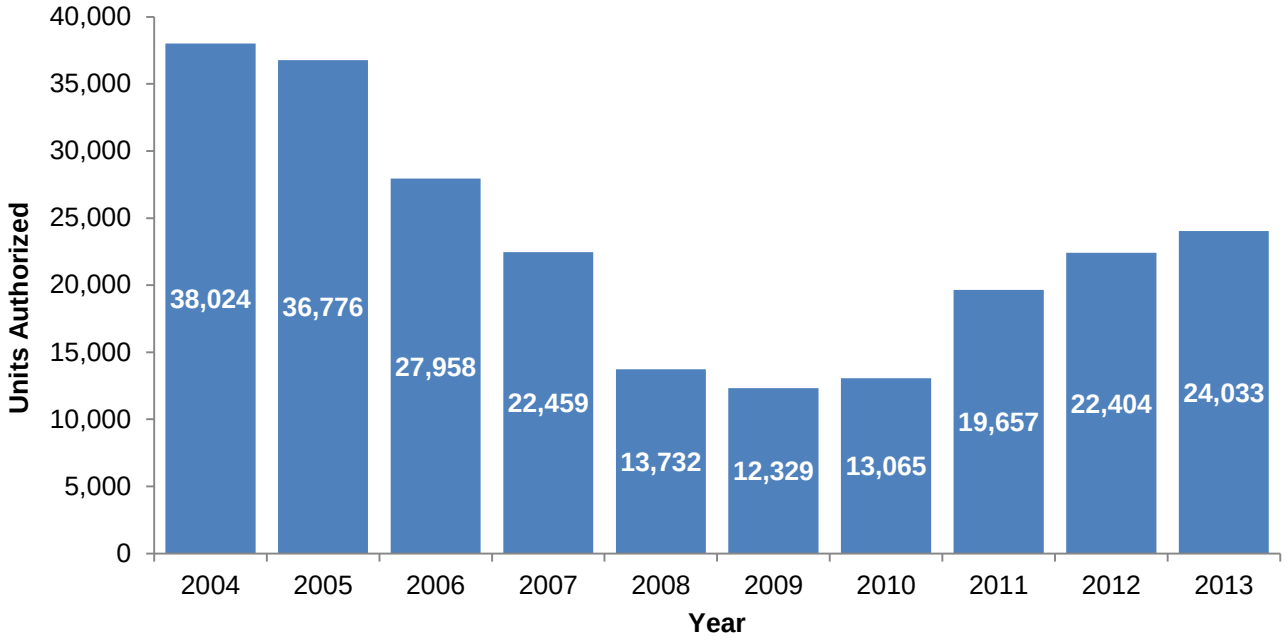
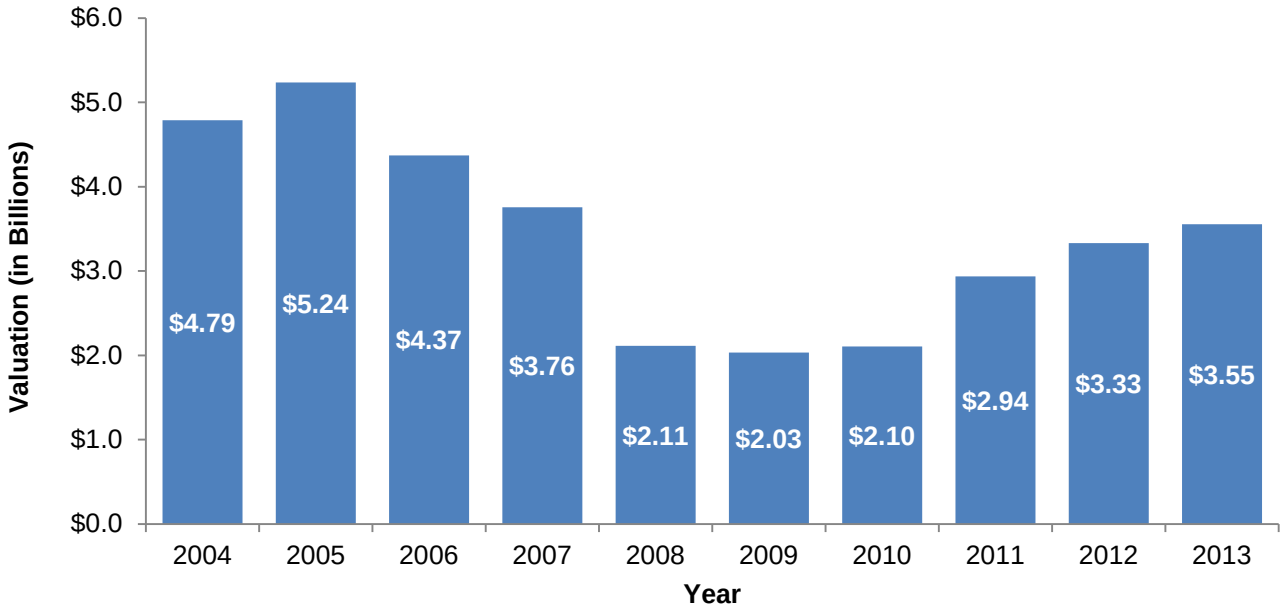
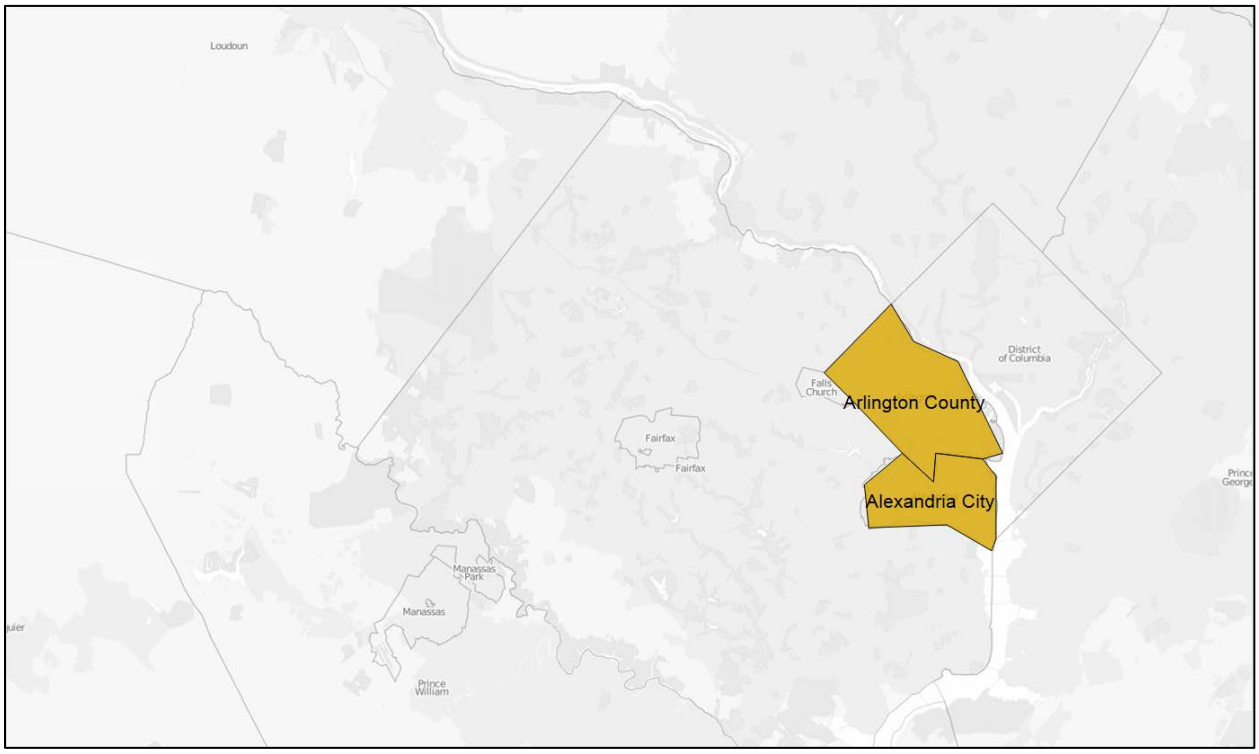


Figure 1.17. Valuation of New Privately Owned Housing Units Authorized in Washington Metropolitan Area: 2004 through 2013 (in Billions of U.S. Dollars)



Chapter 2. Economic Profile of Alexandria City and Arlington County



Chapter 2. Economic Profile of Alexandria City and Arlington County

Summary

Population Growth and Demographic Shifts

- Alexandria City and Arlington County both experienced substantial growth between 2001 and 2012 (12 and 16 percent, respectively), and the populations of both regions are projected to grow at rates of 10 and 11 percent, respectively, from 2012 to 2021. The projected growth in both regions bodes well for the College as more people in the service area means more prospective students for the College.
- From 2012 to 2021, in both Alexandria City and Arlington County, the 20 to 24 year old populations are projected to experience the highest growth of all age groups (34 and 31 percent, respectively).
- The racial/ethnic demographic of the Alexandria City population is projected to change. Mainly, the proportion of the white population in Alexandria City is projected to further decrease by 2021, while the proportion of the Hispanic population is projected to increase. Projections for 2021 suggest that the Hispanic population and the Asian population in Alexandria City will continue to grow faster (21 percent and 16 percent growth, respectively) as compared to the white population (6 percent growth) between 2012 and 2021.
- The racial/ethnic demographic of Arlington County is expected to remain about the same proportionately in 2021 as compared to 2012. The Hispanic population, which decreased in 2012 as compared to 2001, is projected to grow 12 percent from 2012 to 2021. The white population is expected to grow 11 percent and the Asian population is expected to grow 15 percent over the same time period.

Educational Attainment

- Between 2001 and 2012, the proportion of the population with a Bachelor's degree or higher increased from 56 to 60 percent in Alexandria City and from 62 to 72 percent in Arlington County. Projections indicate that the current level of attainment of a Bachelor's degree or higher will remain steady in 2021.
- In Alexandria City, the number of residents with an Associate's degree increased by 20 percent between 2001 and 2012 and is expected to increase an additional 18 percent by 2021. In Arlington County, the number or residents with an Associate's degree increased by 21 percent between 2001 and 2012 and is expected to continue to grow from 2012 to 2021 (9 percent).

Economic Indicators

- Labor force participation rates in both regions have trended upwards and the unemployment rate in Alexandria City and Arlington County began to decrease after 2010.
- Per capita and median household income levels increased in both regions from 1999 to 2012. Median household income increased by 10 percent in Alexandria City and by 21 percent in Arlington County.

- Federal government procurement levels have been volatile and exhibited different trends in the two regions. Federal government procurement decreased 31 percent in Alexandria City between 2005 and 2010, whereas it increased 81 percent in Arlington County over the same time period.
- Housing sales and the average price of housing units have been on an increasing trend in both Alexandria City and Arlington County since around 2010.
- Office vacancy rates have been on the rise since 2010 and reached a 12-year high of 20 percent in 2014.

Employment Trends

- Projections for 2021 suggest that employment across most industries in Alexandria City is likely to remain the same proportionately, with the following industries expected to be the largest: government (23 percent); professional, scientific, and technical services (22 percent); and other services except public administration (11 percent). The number of jobs in the professional, scientific, and technical services industry is expected to grow 29 percent between 2012 and 2021. Among specific occupations, the healthcare support-related occupations are projected to grow at the highest rate (21 percent) between 2012 and 2021.
- In Arlington County in 2012, the largest proportion of residents worked in government (25 percent), followed by professional, scientific, and technical services (22 percent), and accommodation and food services (9 percent). Projections for 2021 suggest that the professional, scientific, and technical services industry (24 percent) is expected to become the largest industry employing Arlington County residents, increasing by 25 percent between 2012 and 2021 followed by government (23 percent) while accommodation and food service is expected to remain the same (9 percent).

I. Population

Table 2.1 presents population data for Alexandria City and Arlington County in 2001, 2012, and projections for 2021. Between 2001 and 2012, the population in both regions grew substantially. Alexandria City experienced a 12 percent growth rate between 2001 and 2012, while Arlington County saw 16 percent growth over the same time period. Projections for 2021 suggest that the Alexandria City population will grow by 10 percent between 2012 and 2021, while Arlington County will grow by 11 percent.

Table 2.1. Alexandria City and Arlington County Population: 2001, 2012, and 2021

Region	2001 Population	2012 Population	Change from 2001 to 2012		2021 Population*	Change from 2012 to 2021*	
			#	%		#	%
Alexandria City	130,935	147,033	16,098	12.3	161,943	14,910	10.1
Arlington County	190,409	220,767	30,358	15.9	245,846	25,079	11.4

Source: QCEW Employees - EMSI 2014.2 Class of Worker
*EMSI projections

Tables 2.2 and 2.3 (both next page) provide the age distribution of Alexandria City and Arlington County populations in 2001, 2012, and projections for 2021. In Alexandria City, 30 to 44 year olds constituted the largest group of the population in 2001, 2012, and are projected to be so in 2021. Between 2001 and 2012, there was growth across all age groups (ranging from 9 to 38 percent), with the exception of the 20 to 24 year old age bracket which experienced a 22 percent decrease over the time period. Population growth was highest among those 60 years and older (38 percent) between 2001 and 2012. Projections for 2021 suggest that the second highest growth rate will occur among the population age 60 and over (23 percent). While the 20 to 24 year old population decreased 22 percent between 2001 and 2012, the same age group is expected to grow at the highest rate (34 percent) from 2012 to 2021.

Similarly in Arlington County, the 30 to 44 year old population constituted the largest group in 2001, 2012, and is projected to do so in 2021. With the exception of the 20 to 24 year old population which decreased by 6 percent between 2001 and 2012, all other age groups experienced a positive growth rate (ranging from 9 to 38 percent). Population growth was highest among 25 to 29 year olds (38 percent). Projections for 2021 suggest that there will be growth across all age categories, with the highest growth rate occurring in the 20 to 24 year old population (31 percent).

Table 2.2. Alexandria City Population Disaggregated by Age: 2001, 2012, and 2021

Age Group	2001		2012		Change from 2001 to 2012		2021*		Change from 2012 to 2021*	
	#	%	#	%	#	%	#	%	#	%
19 and Under	23,979	18.3	28,164	19.1	4,185	17.5	30,937	19.1	2,773	9.9
20 to 24 Years	9,506	7.3	7,415	5.1	-2,091	-22.0	9,927	6.1	2,512	33.9
25 to 29 Years	16,245	12.4	17,658	12.0	1,413	8.7	18,010	11.1	352	2.0
30 to 44 Years	40,162	30.7	44,084	30.0	3,922	9.8	45,003	27.8	919	2.1
45 to 59 Years	25,247	19.3	27,781	18.9	2,534	10.0	31,219	19.3	3,438	12.4
60 and Over	15,796	12.0	21,841	14.9	6,045	38.3	26,847	16.6	5,006	22.9
Total	**130,935**	**100.0**	**147,033**	**100.0**	**16,098**	**12.3**	**161,943**	**100.0**	**14,910**	**10.1**

Source: QCEW Employees - EMSI 2014.2 Class of Worker
*EMSI projections

Table 2.3. Arlington County Population Disaggregated by Age: 2001, 2012, and 2021

Age Group	2001		2012		Change from 2001 to 2012		2021*		Change from 2012 to 2021*	
	#	%	#	%	#	%	#	%	#	%
19 and Under	34,556	18.1	39,183	17.8	4,627	13.4	44,106	18.0	4,923	12.6
20 to 24 Years	16,080	8.4	15,123	6.8	-957	-6.0	19,824	8.1	4,701	31.1
25 to 29 Years	25,706	13.5	35,570	16.1	9,864	38.4	37,699	15.3	2,129	6.0
30 to 44 Years	55,014	28.9	62,465	28.3	7,451	13.6	69,803	28.3	7,338	11.8
45 to 59 Years	35,579	18.7	38,647	17.5	3,068	8.6	40,828	16.6	2,181	5.7
60 and Over	23,475	12.3	29,780	13.5	6,305	26.9	33,586	13.7	3,806	12.8
Total	**190,409**	**100.0**	**220,767**	**100.0**	**30,358**	**16.0**	**245,846**	**100.0**	**25,079**	**11.4**

Source: QCEW Employees - EMSI 2014.2 Class of Worker
*EMSI projections

Tables 2.4 and 2.5 (both next page) provide a racial/ethnic breakdown of the populations of Alexandria City and Arlington County in 2001, 2012, and projections for 2021. In Alexandria City, the majority of the population was white in 2001, 2012, and they are projected to continue to form the majority in 2021. However, the proportion of the white population in Alexandria City declined from 55 percent in 2001 to 53 percent in 2012 and is projected to be 51 percent in 2021. Examining percentage growth of each group reveals that the white population in Alexandria City grew 8 percent between 2001 and 2012, which was significantly lower than growth among the Hispanic population (29 percent growth) and the Asian population (20 percent growth) in the same time period. Projections for 2021 suggest that the Hispanic population and the Asian population will continue to grow faster (21 percent and 16 percent, respectively) compared to the white population (6 percent) and the black population (8 percent).

In Arlington County, the white population also formed the majority in 2001, 2012, and is projected to do so in 2021. All racial/ethnic groups experienced positive growth in Arlington

County between 2001 and 2012 (ranging from 6 to 81 percent growth) with the exception of the Hispanic population which decreased about 4 percent. The population that identified themselves with two or more races experienced the highest growth (81 percent), although they accounted for only about 3 percent of the Arlington County population in 2012. The Asian population grew 25 percent, and the white population grew 20 percent. Projections for 2021 suggest that the populations of all racial/ethnic groups are likely to increase from 2012. The Hispanic population, which decreased from 2001 to 2012, is projected to grow 12 percent between 2012 and 2021. The white population is expected to grow 11 percent and the Asian population is expected to grow 15 percent over the same time period. The black population, which grew by 6 percent between 2001 and 2012, is projected to grow by 8 percent between 2012 and 2021.

Table 2.4. Alexandria City Population Disaggregated by Race/Ethnicity: 2001, 2012, and 2021

Race/Ethnicity	2001		2012		Change from 2001 to 2012		2021*		Change from 2012 to 2021*	
	#	%	#	%	#	%	#	%	#	%
White	72,344	55.3	77,855	53.0	5,511	7.6	82,493	51.0	4,638	5.6
Black	29,342	22.4	31,238	21.2	1,896	6.5	33,787	20.9	2,549	8.2
Hispanic	19,085	14.6	24,640	16.8	5,555	29.1	29,834	18.4	5,194	21.1
Asian	7,726	5.9	9,258	6.3	1,532	19.8	10,777	6.7	1,519	16.4
American Indian or Alaskan Native	307	0.2	343	0.2	36	11.7	381	0.2	38	11.1
Native Hawaiian or Pacific Islander	114	0.1	134	0.1	20	17.5	155	0.1	21	15.7
Two or More Races	2,017	1.5	3,565	2.4	1,548	7.7	4,516	2.8	951	26.7
Total	**130,935**	**100.0**	**147,033**	**100.0**	**16,098**	**12.3**	**161,943**	**100.0**	**14,910**	**10.1**

Source: QCEW Employees - EMSI 2014.2 Class of Worker
*EMSI projections

Table 2.5. Arlington County Population Disaggregated by Race/Ethnicity: 2001, 2012, and 2021

Race/Ethnicity	2001		2012		Change from 2001 to 2012		2021*		Change from 2012 to 2021*	
	#	%	#	%	#	%	#	%	#	%
White	117,556	61.7	141,288	64.0	23,732	20.2	156,171	63.5	14,883	10.5
Black	17,618	9.3	18,644	8.5	1,026	5.8	20,203	8.2	1,559	8.4
Hispanic	34,657	18.2	33,435	15.1	-1,222	-3.5	37,269	15.2	3,834	11.5
Asian	16,994	8.9	21,282	9.6	4,288	25.2	24,503	10.0	3,221	15.1
American Indian or Alaskan Native	411	0.2	458	0.2	47	11.4	515	0.2	57	12.4
Native Hawaiian or Pacific Islander	124	0.1	154	0.1	30	24.2	169	0.1	15	9.7
Two or More Races	3,050	1.6	5,506	2.5	2,456	80.5	7,016	2.9	1,510	27.4
Total	**190,410**	**100.0**	**220,767**	**100.0**	**30,357**	**15.9**	**245,846**	**100.0**	**25,079**	**11.4**

Source: QCEW Employees - EMSI 2014.2 Class of Worker
*EMSI projections

II. Education

Table 2.6 and Figure 2.1 (next page) provide data on the educational attainment levels of the Alexandria City population age 25 and older in 2001, 2012, and projections for 2021. The data show an increase in the educational attainment of the Alexandria City population with the percentage of the population holding a Bachelor's degree or higher increasing from 56 percent in 2001 to 60 percent in 2012 and projected to remain at that level (59 percent) in 2021.

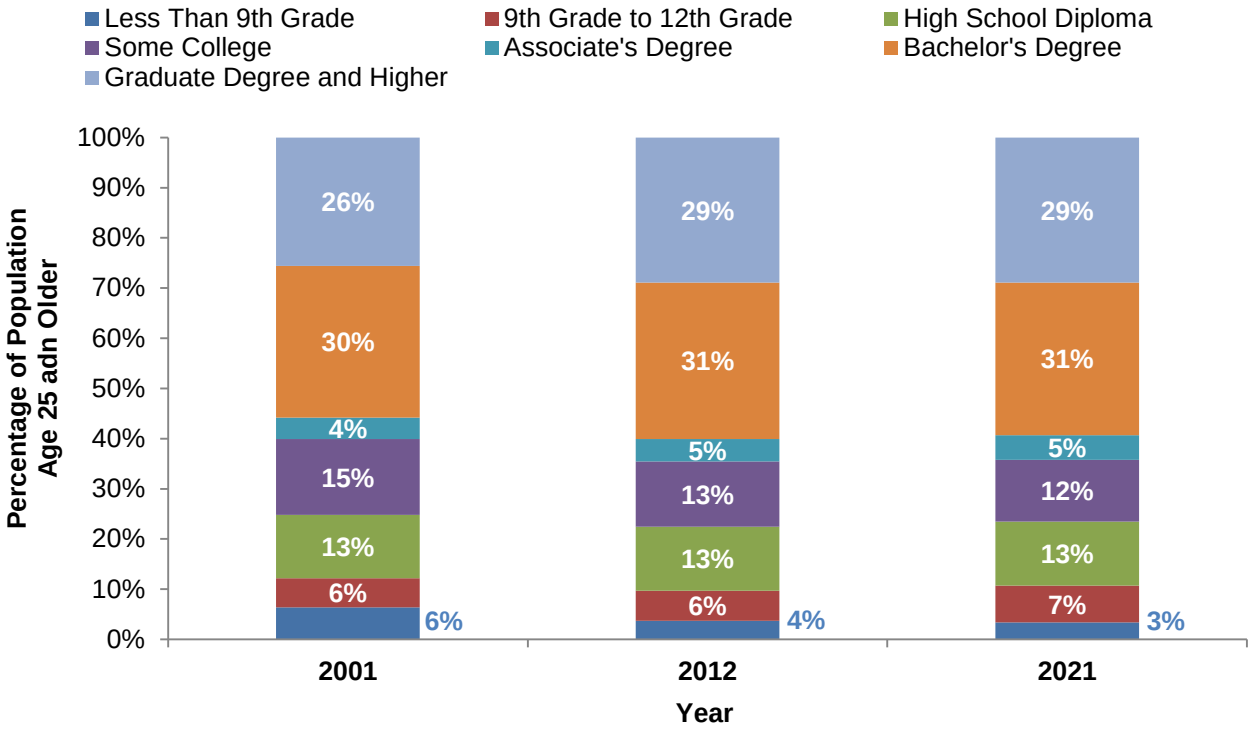
Between 2001 and 2012, the proportion of the Alexandria City population with the lowest level of education (less than 9th grade) decreased about 3 percentage points, and the highest level (graduate degree or higher) increased by about 3 percentage points. The proportion of the population with an Associate's degree stayed the same proportionally between 2001 and 2012 (approximately 4 percent). However, there was a 20 percent increase in the number of residents with an Associate's degree, and a further 18 percent increase is projected by 2021.

Table 2.6. Educational Attainment of the Alexandria City Population Age 25 and Older: 2001, 2012, and 2021

Educational Attainment	2001		2012		% Change from 2001 to 2012	2021*		% Change from 2012 to 2021*
	#	%	#	%		#	%	
Less Than 9th Grade	6,259	6.4	4,116	3.7	-34.2	4,059	3.4	-1.4
9th Grade to 12th Grade	5,699	5.8	6,695	6.0	17.5	8,791	7.3	31.3
High School Diploma	12,282	12.6	14,185	12.7	15.5	15,485	12.8	9.2
Some College	14,695	15.1	14,508	13.0	-1.3	14,850	12.3	2.4
Associate's Degree	4,177	4.3	5,031	4.5	20.4	5,913	4.9	17.5
Bachelor's Degree	29,386	30.2	34,666	31.1	18.0	36,981	30.5	6.7
Graduate Degree and Higher	24,953	25.6	32,254	28.9	29.3	35,000	28.9	8.5
Population Age 25 and Older	**97,450**	**100.0**	**111,454**	**100.0**	**14.4**	**121,079**	**100.0**	**8.6**

Source: QCEW Employees - EMSI 2014.2 Class of Worker
*EMSI projections

Figure 2.1. Educational Attainment of the Alexandria City Population Age 25 and Older by Education Level: 2001, 2012, and 2021



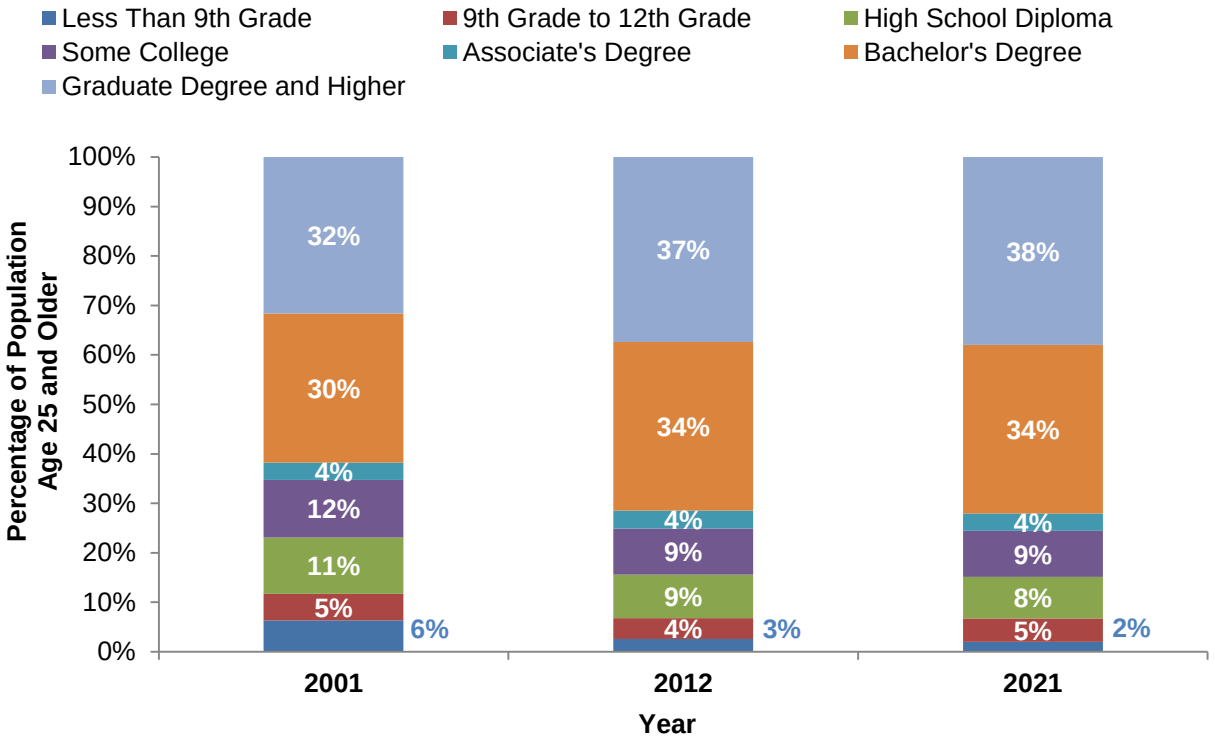
As seen in Table 2.7 and Figure 2.2 (both next page), in Arlington County, the percent of the population with a Bachelor's degree or higher increased by 10 percentage points from 62 percent in 2001 to 72 percent in 2012, and is projected to maintain that level (72 percent) in 2021. Between 2001 and 2012, the proportion of the population with the lowest level of education (less than 9th grade) decreased about 4 percentage points, and the highest level (graduate degree or higher) increased by about 6 percentage points. Between 2001 and 2012, the population of Arlington residents with an Associate's degree increased by 21 percent and is expected to continue to increase by 9 percent from 2012 to 2021.

Table 2.7. Educational Attainment of the Arlington County Population Age 25 and Older: 2001, 2012, and 2021

Educational Attainment	2001		2012		% Change from 2001 to 2012	2021*		% Change from 2012 to 2021*
	#	%	#	%		#	%	
Less Than 9th Grade	8,833	6.3	4,342	2.6	-50.8	3,680	2.0	-15.2
9th Grade to 12th Grade	7,528	5.4	7,057	4.2	-6.3	8,587	4.7	21.7
High School Diploma	15,924	11.4	14,668	8.8	-7.9	15,317	8.4	4.4
Some College	16,201	11.6	15,427	9.3	-4.8	16,922	9.3	9.7
Associate's Degree	4,893	3.5	5,942	3.6	21.4	6,457	3.5	8.7
Bachelor's Degree	42,208	30.2	56,715	34.1	34.4	61,950	34.1	9.2
Graduate Degree and Higher	44,188	31.6	62,309	37.4	41.0	69,004	37.9	10.7
Population Age 25 and Older	**139,774**	**100.0**	**166,461**	**100.0**	**19.1**	**181,916**	**100.0**	**9.3**

Source: QCEW Employees - EMSI 2014.2 Class of Worker
*EMSI projections

Figure 2.2. Educational Attainment of the Arlington County Population Age 25 and Older by Education Level: 2001, 2012, and 2021



III. Employment

Table 2.8 presents the employment status of the Alexandria City population in 2000 and 2012. In Alexandria City the total working age population (population age 16 years and over) increased 13 percent while the civilian labor force increased 18 percent. The civilian labor force accounted for 73 percent of the working age population in 2000 and increased to 76 percent in 2012. The armed forces population increased by 23 percent between 2000 and 2012 but continued to account for less than 2 percent of the total working age population.

Table 2.8. Employment Status of Alexandria City Population Age 16 and Older: 2000 and 2012

Employment Status	2000		2012		% Change from 2000 to 2012
	#	%	#	%	
Civilian Labor Force	79,088	72.7	93,396	76.3	18.1
Employed	76,584	–	89,274	–	16.6
Unemployed	2,504	–	4,122	–	64.6
Not in Labor Force	27,815	25.6	26,679	21.8	-4.1
Armed Forces	1,861	1.7	2,284	1.9	22.7
Population Age 16 and Older	**108,764**	**100.0**	**122,359**	**100.0**	**12.5**

Sources: U.S. Census Bureau, Census 2012, Table DP-3; U.S. Census Bureau, 2012 American Community Survey, Table DP03

Table 2.9 presents the employment status of the Arlington County population in 2000 and 2012. In Arlington County, between 2000 and 2012, the total working age population increased 16 percent and the civilian labor force increased 26 percent. The civilian labor force, as a share of the total working wage population, increased from 73 percent in 2000 to 79 percent in 2012. Between 2000 and 2012, the armed forces population decreased 42 percent and, as a share of the total working age population, decreased from 2 to 1 percent. Figure 2.3 (next page) depicts the employment status of the populations in Alexandria City and Arlington County in 2012.

Table 2.9. Employment Status of Arlington County Population Age 16 and Older: 2000 and 2012

Employment Status	2000		2012		% Change from 2000 to 2012
	#	%	#	%	
Civilian Labor Force	117,328	72.7	147,402	78.5	25.6
Employed	114,040	–	141,213	–	23.8
Unemployed	3,288	–	6,189	–	88.2
Not in Labor Force	40,530	25.1	38,360	20.4	-5.4
Armed Forces	3,475	2.2	2,026	1.1	-41.7
Population Age 16 and Older	**161,333**	**100.0**	**187,788**	**100.0**	**16.4**

Sources: U.S. Census Bureau, Census 2012, Table DP-3; U.S. Census Bureau, 2012 American Community Survey, Table DP03

Figure 2.3. Employment Status of Alexandria City and Arlington County Population Age 16 and Older: 2012

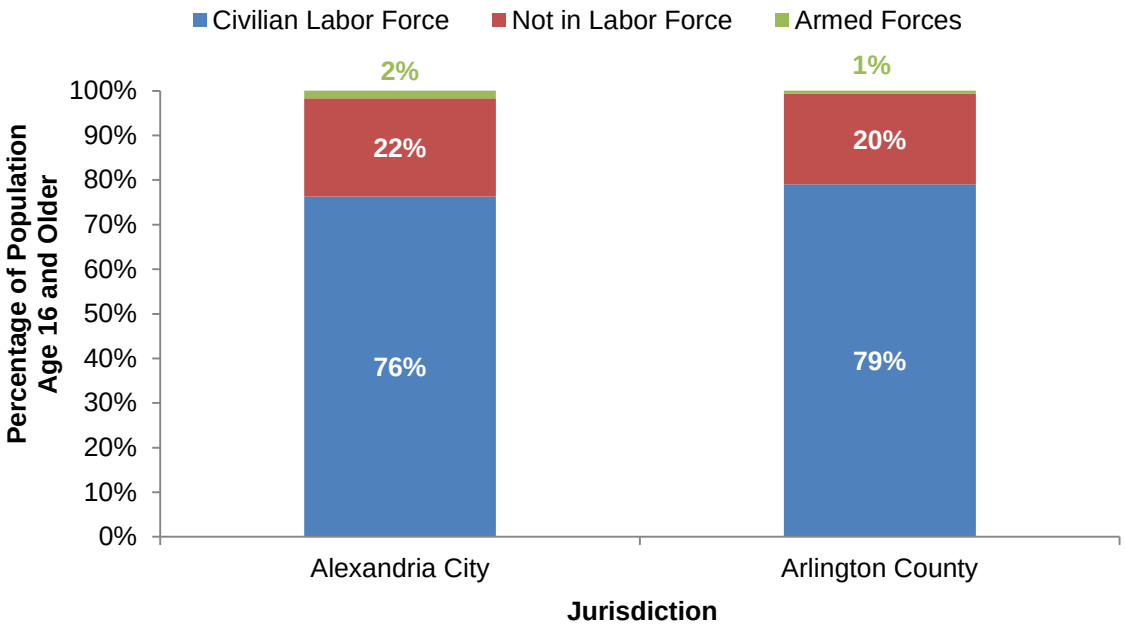


Table 2.10 presents the labor force participation rate in Alexandria City, Arlington County, Virginia, and the United States in 2012. In 2012, the labor force participation rates in Alexandria City (78 percent) and Arlington County (79 percent) were higher than the Virginia labor force participation rate (67 percent) and the national labor force participation rate (64 percent).

Table 2.10. Labor Force Participation Rates in Alexandria City, Arlington County, Virginia, and the United States: 2012

Area	Civilian Labor Force	Civilian Population Age 16 and Older	Labor Force Participation Rate (%)
Alexandria City	93,396	120,075	77.8
Arlington County	147,402	185,762	79.3
Virginia	4,221,840	6,318,183	66.8
United States	154,975,000	243,284,000	63.7

Sources: U.S. Census Bureau, 2012 American Community Survey, Table DP03 (county level data)
U.S. Bureau of Labor Statistics, States and Selected Areas (state data) and Labor Force Statistics from the Current Population Survey (national data)

Table 2.11 and Figure 2.4 (both next page) present annual unemployment rate data for Alexandria City, Arlington County, the state of Virginia, and the United States from 2000 through 2013. For all years presented, unemployment rates in Alexandria City and Arlington County were below the state and national averages. In 2000, unemployment was at a 13 year low, 1.8 percent in Alexandria City and 1.6 percent in Arlington County. While unemployment fluctuated throughout the years, it peaked in 2010 at 5.2 percent in Alexandria City and 4.5 percent in

Arlington County. Between 2010 and 2013, unemployment was on a decreasing trend, but in 2013 unemployment still stood over twice the rate it was in 2000 in both jurisdictions.

Table 2.11. Unemployment Rates for Alexandria City, Arlington County, Virginia, and the United States: 2000 through 2013

Year	Unemployment Rate (%)			
	Alexandria City	Arlington County	Virginia	United States
2000	1.8	1.6	2.3	4.0
2001	2.7	2.4	3.2	4.7
2002	3.4	3.0	4.2	5.8
2003	3.0	2.7	4.1	6.0
2004	2.7	2.4	3.7	5.5
2005	2.6	2.3	3.5	5.1
2006	2.2	2.0	3.1	4.6
2007	2.2	1.9	3.1	4.6
2008	2.8	2.5	4.0	5.8
2009	5.0	4.4	7.0	9.3
2010	5.2	4.5	7.1	9.6
2011	4.6	4.0	6.4	8.9
2012	4.2	3.7	5.9	8.1
2013	4.1	3.6	5.6	7.4

Source: U.S. Bureau of Labor Statistics, Local Area Unemployment Statistics, not seasonally adjusted

Figure 2.4. Unemployment Rates for Alexandria City and Arlington County: 2000 through 2013

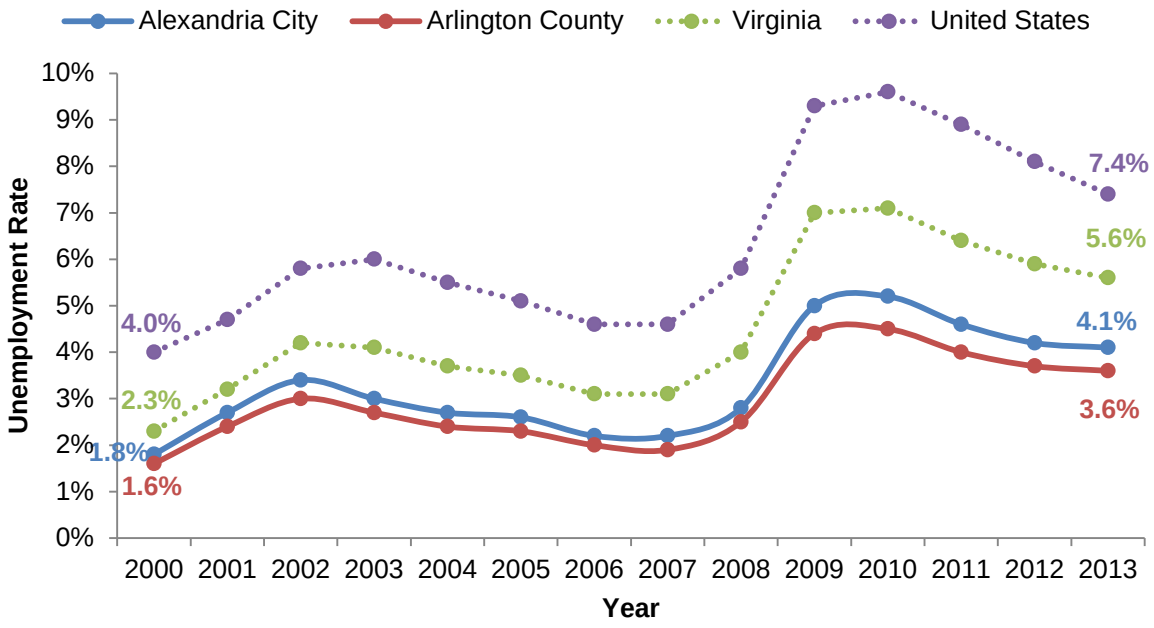


Table 2.12 (below) and Figure 2.5 (next page) present data on employment by industry for Alexandria City in 2001, 2012, and projections for 2021. In 2012, the largest percentage of Alexandria City workers were employed in government jobs (24 percent), followed by professional, scientific, and technical services (18 percent), and other services (except public administration) (11 percent). Projections for 2021 suggest that employment across most industries is likely to remain the same proportionately. In 2021, the largest proportion of the population is projected to work in government jobs (23 percent) and about 11 percent will continue to work in other services (except public administration). However, employment in professional, scientific, and technical services is projected to increase about 4 percentage points from 18 percent of Alexandria City workers in 2012 to 22 percent in 2021. Projections suggest that employment within the field is expected to grow 29 percent between 2012 and 2021.

Table 2.12. Employment by Industry for Alexandria City: 2001, 2012, and 2021

Industry	2001		2012		% Change from 2001 to 2012	2021*		% Change from 2012 to 2021*
	#	%	#	%		#	%	
Accommodation and Food Services	7,683	8.4	8,006	8.4	4.2	8,680	8.5	8.4
Administrative and Support and Waste Management and Remediation Services	7,337	8.0	5,892	6.2	-19.7	5,653	5.6	-4.0
Agriculture, Forestry, Fishing and Hunting	0	0.0	<10	<0.1	–	<10	<0.1	–
Arts, Entertainment, and Recreation	589	0.6	882	0.9	49.8	1,117	1.1	26.6
Construction	3,326	3.6	2,464	2.6	-25.9	2,282	2.2	-7.4
Educational Services (Private)	1,742	1.9	1,109	1.2	-36.3	1,109	1.1	0.0
Finance and Insurance	3,493	3.8	2,466	2.6	-29.4	2,178	2.1	-11.7
Government	16,555	18.1	22,742	23.8	37.4	23,076	22.7	1.5
Health Care and Social Assistance	5,725	6.2	6,182	6.5	8.0	7,388	7.3	19.5
Information	2,929	3.2	1,792	1.9	-38.8	1,413	1.4	-21.1
Management of Companies and Enterprises	620	0.7	823	0.9	32.7	764	0.8	-7.1
Manufacturing	1,681	1.8	1,379	1.4	-17.9	1,198	1.2	-13.1
Mining, Quarrying, and Oil and Gas Extraction	<10	<0.1	<10	<0.1	–	<10	<0.1	–
Other Services (except Public Administration)	9,526	10.4	10,550	11.0	10.8	11,426	11.2	8.3
Professional, Scientific, and Technical Services	13,599	14.8	17,526	18.3	28.9	22,621	22.2	29.1
Real Estate and Rental and Leasing	3,223	3.5	2,503	2.6	-22.3	1,670	1.6	-33.3
Retail Trade	9,097	9.9	7,806	8.2	-14.2	8,311	8.2	6.5
Transportation and Warehousing	2,009	2.2	1,589	1.7	-20.9	1,282	1.3	-19.3
Utilities	454	0.5	260	0.3	-42.6	106	0.1	-59.4
Wholesale Trade	2,089	2.3	1,612	1.7	-22.8	1,557	1.5	-3.4
Total	**91,677**	**100.0**	**95,585**	**100.0**	**4.3**	**101,832**	**100.0**	**6.5**

Source: EMSI, Table 2014.2 – QCEW Employees
*EMSI Projections

Figure 2.5. Top 10 Industries in Alexandria City by Number of Jobs: 2012

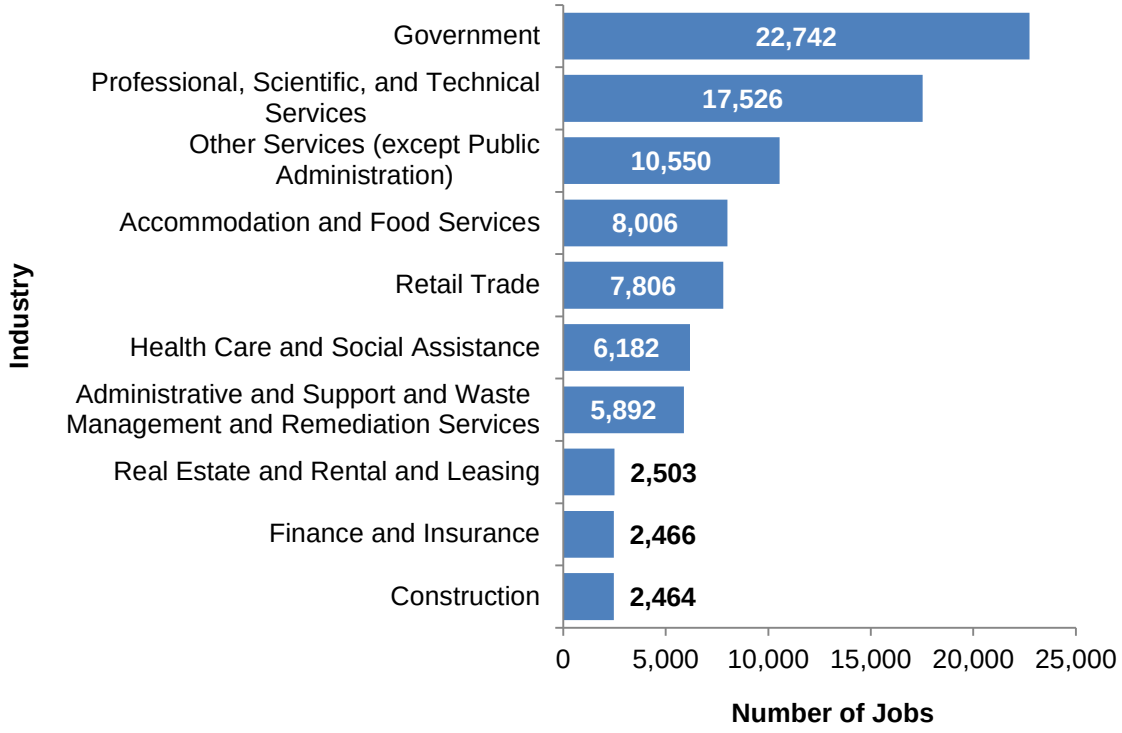


Table 2.13 (next page) and Figure 2.6 (following page) present data on employment by industry for Arlington County in 2001, 2012, and projections for 2021. In 2012, the largest percentage of Arlington County workers were employed in government jobs (25 percent); followed by professional, scientific, and technical services (22 percent); and then, accommodation and food services (9 percent). Projections for 2021 suggest that Arlington County employment across most industries is likely to remain the same proportionately. However, the professional, scientific, and technical services industry is projected to surpass government as the industry employing the most Arlington County workers. The professional, scientific, and technical services industry is projected to be among the fastest growing in the region (25 percent) from 2012 to 2021.

Table 2.13. Employment by Industry in Arlington County: 2001, 2012, and 2021

Industry	2001		2012		% Change from 2001 to 2012	2021*		% Change from 2012 to 2021*
	#	%	#	%		#	%	
Accommodation and Food Services	12,216	7.7	15,421	9.3	26.2	17,590	9.2	14.1
Administrative and Support and Waste Management and Remediation Services	10,459	6.6	8,750	5.3	-16.3	10,269	5.4	17.4
Agriculture, Forestry, Fishing and Hunting	<10	<0.1	<10	<0.1	–	<10	<0.1	–
Arts, Entertainment, and Recreation	1,093	0.7	1,863	1.1	70.5	2,401	1.3	28.9
Construction	4,377	2.8	2,340	1.4	-46.6	3,339	1.7	42.7
Educational Services (Private)	3,274	2.1	6,314	3.8	92.9	8,452	4.4	33.9
Finance and Insurance	2,751	1.7	3,644	2.2	32.4	4,401	2.3	20.8
Government	40,530	25.5	41,817	25.2	3.2	43,288	22.6	3.5
Health Care and Social Assistance	7,786	4.9	9,014	5.4	15.8	11,263	5.9	25.0
Information	9,441	5.9	4,133	2.5	-56.2	5,070	2.6	22.7
Management of Companies and Enterprises	3,503	2.2	2,687	1.6	-23.3	2,082	1.1	-22.5
Manufacturing	865	0.5	713	0.4	-17.5	754	0.4	5.6
Mining, Quarrying, and Oil and Gas Extraction	0.0	0.0	<10	<0.1	–	<10	<0.1	–
Other Services (except Public Administration)	8,044	5.1	10,800	6.5	34.3	13,318	7.0	23.3
Professional, Scientific, and Technical Services	30,636	19.2	36,109	21.8	17.9	44,938	23.5	24.5
Real Estate and Rental and Leasing	4,016	2.5	3,197	1.9	-20.4	3,262	1.7	2.0
Retail Trade	9,053	5.7	9,120	5.5	0.7	9,833	5.1	7.8
Transportation and Warehousing	8,980	5.6	7,987	4.8	-11.1	8,915	4.7	11.6
Utilities	166	0.1	619	0.4	273.7	702	0.4	13.5
Wholesale Trade	1,975	1.2	1,243	0.7	-37.1	1,470	0.8	18.3
Total	**159,167**	**100.0**	**165,773**	**100.0**	**4.2**	**191,349**	**100.0**	**15.4**

Source: EMSI, Table 2014.2 – QCEW Employees
*EMSI Projections

Figure 2.6. Top 10 Industries in Arlington County by Number of Jobs: 2012

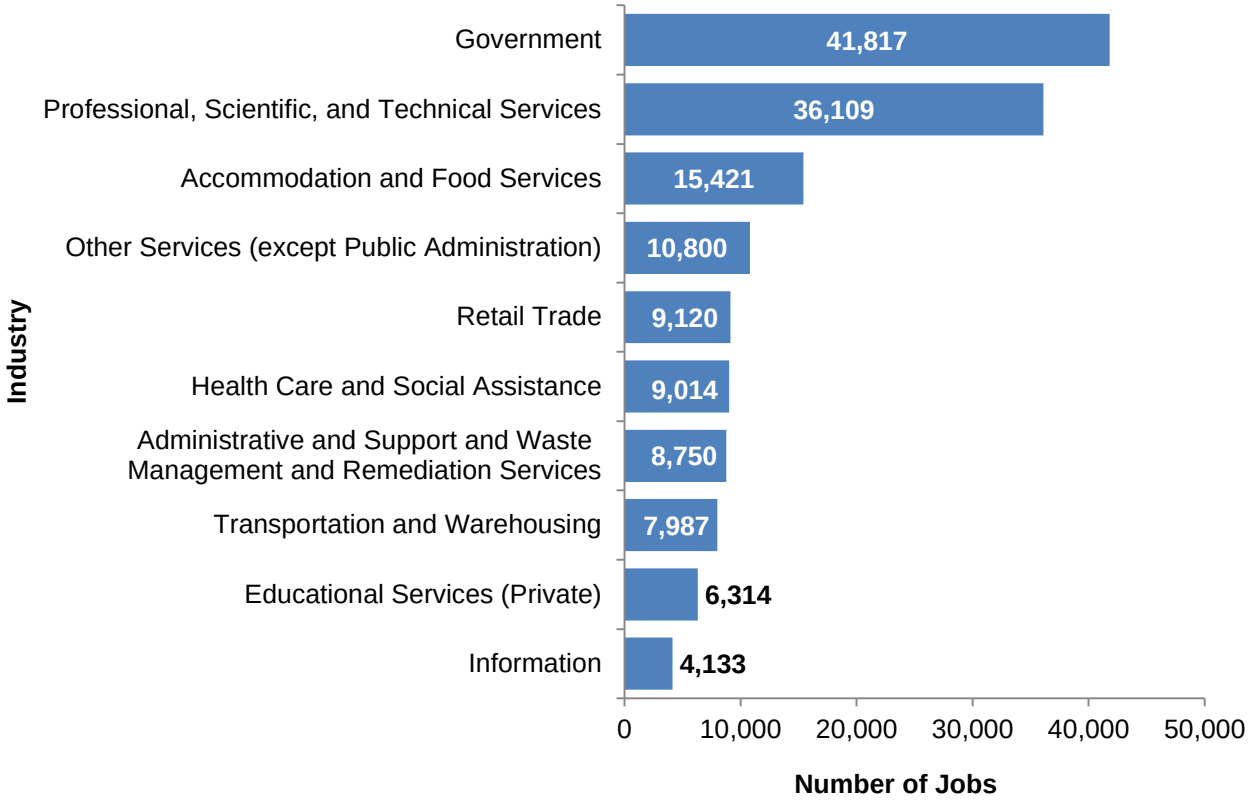


Table 2.14 (next page) and Figure 2.7 (following page) display employment data by occupation for Alexandria City in 2001, 2012, and projections for 2021. In 2012, over 13 percent of all occupations in Alexandria City were in office and administrative support, followed by 12 percent in business and financial operations, and 8 percent employed in sales and related occupations. Projections for 2021 suggest that employment across most industries is likely to remain the same proportionately. Healthcare support-related occupations are projected to grow at the highest rate (21 percent) between 2012 and 2021.

Table 2.14. Employment by Occupation in Alexandria City: 2001, 2012, and 2021

Occupation	2001		2012		% Change from 2001 to 2012	2021*		% Change from 2012 to 2021*
	#	%	#	%		#	%	
Architecture and Engineering	2,502	2.7	3,132	3.3	25.2	3,549	3.5	13.3
Arts, Design, Entertainment, Sports, and Media	2,367	2.6	2,428	2.5	2.6	2,374	2.3	-2.2
Building and Grounds Cleaning and Maintenance	3,247	3.5	4,186	4.4	28.9	4,633	4.5	10.7
Business and Financial Operations	8,586	9.4	11,356	11.9	32.3	12,641	12.4	11.3
Community and Social Service	990	1.1	942	1.0	-4.8	966	0.9	2.5
Computer and Mathematical	6,038	6.6	7,350	7.7	21.7	8,515	8.4	15.9
Construction and Extraction	2,721	3.0	2,152	2.3	-20.9	2,107	2.1	-2.1
Education, Training, and Library	3,338	3.6	3,370	3.5	1.0	3,711	3.6	10.1
Farming, Fishing, and Forestry	51	0.1	45	<0.1	-12.0	50	<0.1	11.0
Food Preparation and Serving Related	6,899	7.5	7,241	7.6	4.9	7,969	7.8	10.1
Healthcare Practitioners and Technical	3,040	3.3	3,431	3.6	12.8	3,880	3.8	13.1
Healthcare Support	1,364	1.5	1,489	1.6	9.1	1,804	1.8	21.2
Installation, Maintenance, and Repair	3,657	4.0	3,207	3.4	-12.3	3,008	3.0	-6.2
Legal	1,866	2.0	3,136	3.3	68.1	3,497	3.4	11.5
Life, Physical, and Social Science	1,305	1.4	1,487	1.6	14.0	1,563	1.5	5.1
Management	6,352	6.9	7,216	7.5	13.6	7,607	7.5	5.4
Office and Administrative Support	14,474	15.8	12,705	13.3	-12.2	12,898	12.7	1.5
Personal Care and Service	2,705	3.0	3,343	3.5	23.6	3,933	3.9	17.6
Production Occupations	2,751	3.0	2,129	2.2	-22.6	2,033	2.0	-4.5
Protective Service	2,835	3.1	3,203	3.4	13.0	3,314	3.3	3.5
Sales and Related	9,819	10.7	7,998	8.4	-18.5	7,916	7.8	-1.0
Transportation and Material Moving	4,770	5.2	4,041	4.2	-15.3	3,866	3.8	-4.3
Total	**91,677**	**100.0**	**95,585**	**100.0**	**4.3**	**101,832**	**100.0**	**6.5**

Source: EMSI, Table 2014.2 – QCEW Employees
*EMSI Projections

Figure 2.7. Top 10 Occupations in Alexandria City by Number of Jobs: 2012

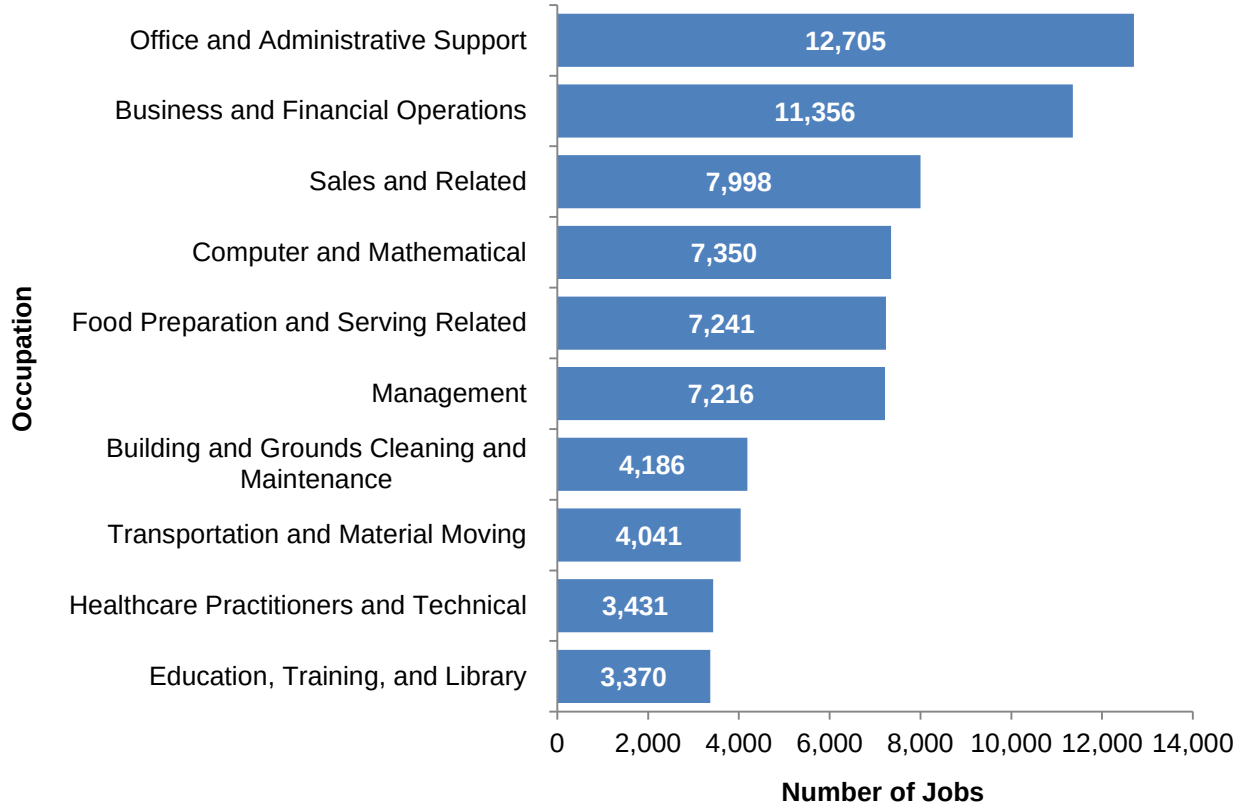


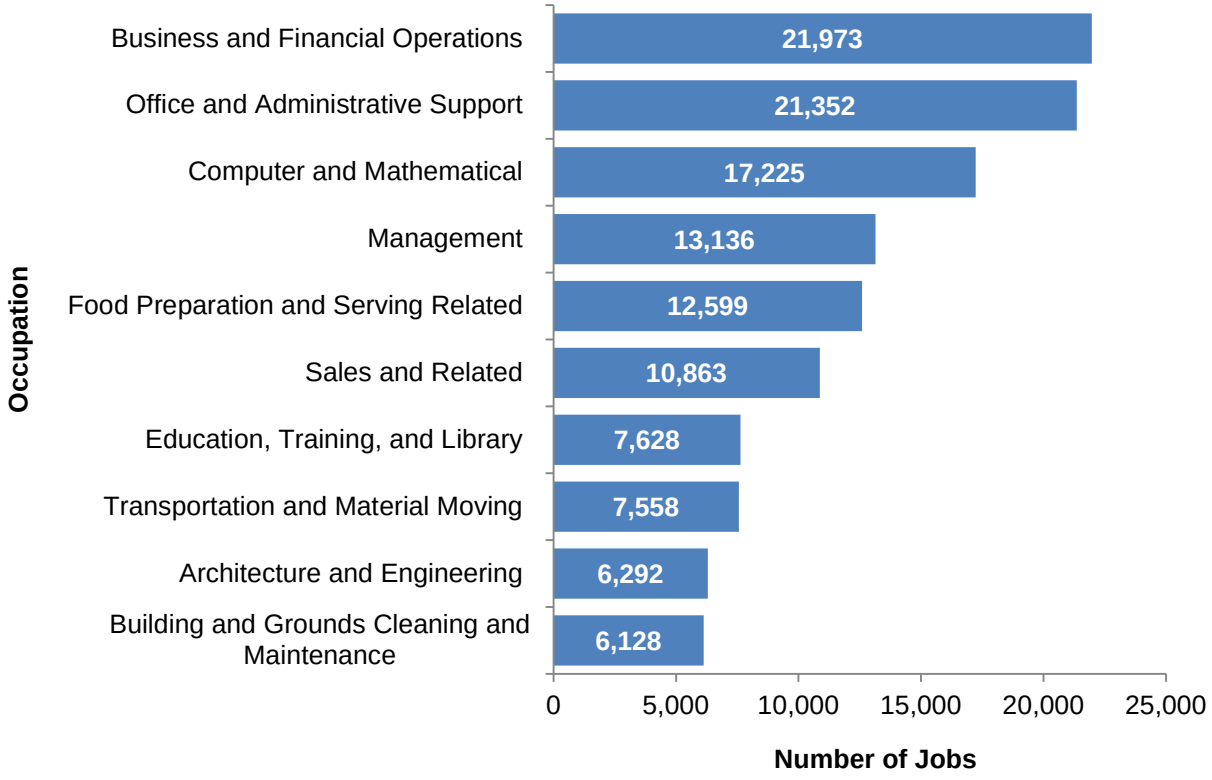
Table 2.15 (next page) and Figure 2.8 (following page) display employment data by occupation for Arlington County for the year 2001, 2012, and projections for 2021. In 2012, the two largest occupations in Arlington County were the business and financial operations field (13 percent) and the office and administrative support field (13 percent). Over 10 percent were in computer and mathematical occupations. Projections for 2021 suggest that employment across most occupations is likely to remain the same proportionately.

Table 2.15. Employment by Occupation in Arlington County: 2001, 2012, and 2021

Occupation	2001		2012		% Change from 2001 to 2012	2021*		% Change from 2012 to 2021*
	#	%	#	%		#	%	
Architecture and Engineering	6,881	4.3	6,292	3.8	-8.6	6,068	3.2	-3.6
Arts, Design, Entertainment, Sports, and Media	3,507	2.2	4,172	2.5	18.9	5,400	2.8	29.4
Building and Grounds Cleaning and Maintenance	6,853	4.3	6,128	3.7	-10.6	7,460	3.9	21.7
Business and Financial Operations	18,772	11.8	21,973	13.3	17.0	26,203	13.7	19.3
Community and Social Service	1,568	1.0	1,977	1.2	26.0	2,492	1.3	26.1
Computer and Mathematical	15,469	9.7	17,225	10.4	11.3	19,993	10.4	16.1
Construction and Extraction	3,640	2.3	2,511	1.5	-31.0	3,220	1.7	28.2
Education, Training, and Library	5,245	3.3	7,628	4.6	45.4	9,672	5.1	26.8
Farming, Fishing, and Forestry	62	<0.1	54	<0.1	-12.9	67	<0.1	24.4
Food Preparation and Serving Related	9,313	5.9	12,599	7.6	35.3	14,827	7.7	17.7
Healthcare Practitioners and Technical	5,222	3.3	5,583	3.4	6.9	6,359	3.3	13.9
Healthcare Support	1,846	1.2	2,039	1.2	10.5	2,574	1.3	26.2
Installation, Maintenance, and Repair	5,983	3.8	4,241	2.6	-29.1	4,540	2.4	7.0
Legal	4,325	2.7	4,248	2.6	-1.8	4,143	2.2	-2.5
Life, Physical, and Social Science	2,832	1.8	3,168	1.9	11.9	3,700	1.9	16.8
Management	12,247	7.7	13,136	7.9	7.3	14,865	7.8	13.2
Office and Administrative Support	24,170	15.2	21,352	12.9	-11.7	24,144	12.6	13.1
Personal Care and Service	3,897	2.4	5,286	3.2	35.6	6,565	3.4	24.2
Production	2,826	1.8	2,311	1.4	-18.2	2,461	1.3	6.5
Protective Service	4,706	3.0	5,431	3.3	15.4	5,835	3.0	7.4
Sales and Related	11,618	7.3	10,863	6.6	-6.5	12,396	6.5	14.1
Transportation and Material Moving	8,183	5.1	7,558	4.6	-7.6	8,367	4.4	10.7
Total	**159,167**	**100.0**	**165,773**	**100.0**	**4.2**	**191,349**	**100.0**	**15.4**

Source: EMSI, Table 2014.2 – QCEW Employees
*EMSI Projections

Figure 2.8. Top 10 Occupations in Arlington County by Number of Jobs: 2012



IV. Employer Profile

Table 2.16 provides information on the largest employers in Alexandria City in 2014. The Department of Defense employed the largest number of persons, followed by INOVA Alexandria Hospital, and the Washington Metro Area Transit Authority. NOVA is also among the largest employers in Alexandria City, employing between 600 and 999 persons. The list reveals the diversity of the economy in the area, which encompasses companies across a broad spectrum of industries and a mixture of both private and publicly-owned companies.

Table 2.16. Top Employers in Alexandria City: 2014

Employers	Estimated Number of Employees	Type of Business
Department of Defense	2,500-4,999	National security
INOVA Alexandria Hospital	1,500-2,499	Health care
Washington Metro Area Transit Authority	1,000-1,499	Transit system
Institute for Defense Analyses	600-999	Scientific research
Northern Virginia Community College	600-999	Higher education
Pentagon Federal Credit Union	300-599	Credit union
Public Broadcasting Service (PBS)	300-599	Television broadcasting station

Source: Virginia Economic Development Partnership (VEDP) Community Profiles, City of Alexandria

Table 2.17 (next page) provides information on the largest employers in Arlington County in 2014. Deloitte employed the largest number of persons, followed by Accenture, the Marriott Corporation, SAIC, and the Virginia Hospital Center. Nine employers in Arlington County employ at least 1,000 persons. Many of the large employers in Arlington County were involved in the business services, information services, technology solutions, or computer services sectors.

Table 2.17. Top Employers in Arlington County: 2014

Employers	Estimated Number of Employees	Type of Business
Deloitte	5,000-9,999	Business services
Accenture	2,500-4,999	Business services
Marriott Corporation	1,500-2,499	Hospitality
SAIC	1,500-2,499	Information systems & technology solutions
Virginia Hospital Center	1,500-2,499	Medical services
Booz Allen Hamilton	1,000-1,499	Business services
Lockheed Martin	1,000-1,499	Technology solutions
CACI, Inc.	1,000-1,499	Computer services
Corporate Executive Board	1,000-1,499	Business services
BAE Systems, Inc.	600-999	Defense and aerospace
Bureau of National Affairs	600-999	Publishing
Marymount University	600-999	Education services
SRA International	600-999	Technology solutions
Boeing Company	300-599	Aircraft manufacturing
E*TRADE Financials	300-599	Finance
General Dynamics Information Systems	300-599	Technology solutions
Macy's	300-599	Retail
Nordstrom, Inc.	300-599	Retail
National Rural Electric Cooperative Association (NRECA)	300-599	Associations
Starwood Hotels	300-599	Hospitality

Source: Virginia Economic Development Partnership (VEDP) Community Profiles – Arlington County

V. Federal Government Procurement

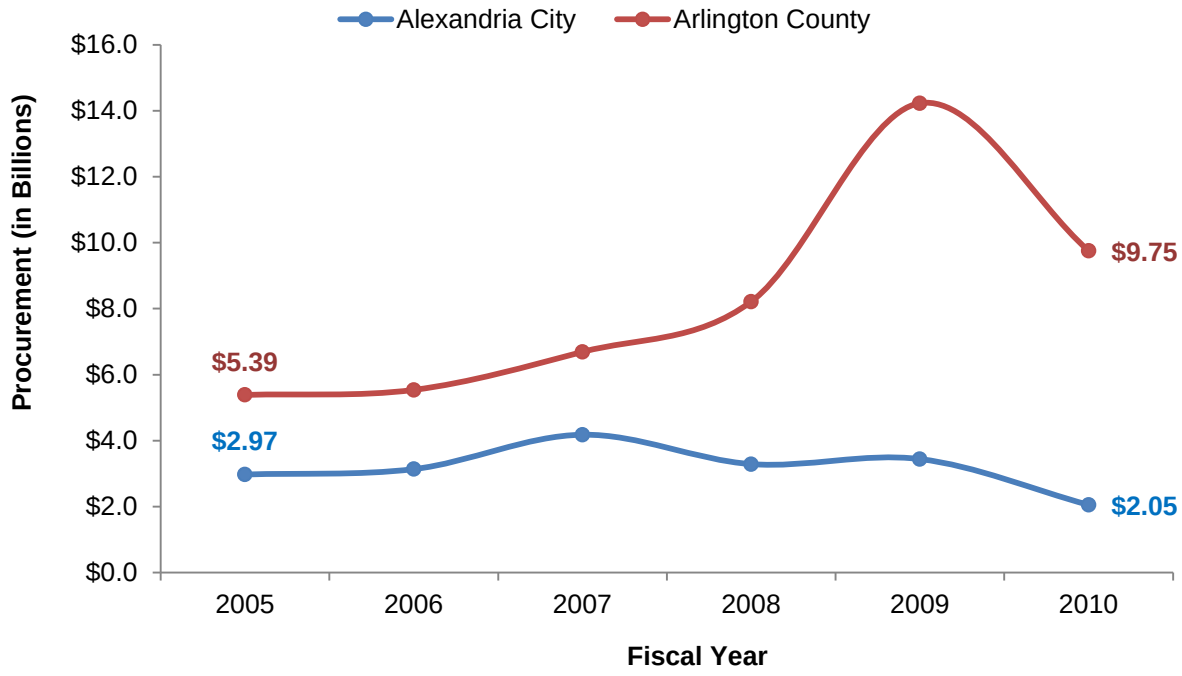
Table 2.18 and Figure 2.9 present data on federal government procurement from firms located in Alexandria City and Arlington County for fiscal years 2005 through 2010. Total federal government procurement for firms located in Arlington County increased 81 percent between 2005 and 2010. In contrast, federal government procurement for Alexandria City decreased 31 percent over the same time period.

Table 2.18. Federal Government Procurement in Alexandria City and Arlington County: Fiscal Years 2005 through 2010 (in U.S. Dollars)

Jurisdiction	Year						% Change 2005 to 2010
	2005	2006	2007	2008	2009	2010	
Alexandria City	2,973,057,000	3,136,671,000	4,179,542,000	3,288,311,000	3,441,175,000	2,051,206,000	-31.0
Arlington County	5,385,399,000	5,538,167,000	6,690,384,000	8,215,307,000	14,228,344,000	9,751,619,000	81.1

Source: U.S. Census Bureau, Consolidated Federal Funds Report (CFFR) 2005 to 2010
Federal Financial Statistics program was terminated in 2012; therefore, the CFFR 2010 is the most recent available data
Amounts are not adjusted for inflation

Figure 2.9. Federal Government Procurement in Alexandria City and Arlington County: Fiscal Years 2005 through 2010 (in Billions of U.S. Dollars)



VI. Income

Tables 2.19 and 2.20 and Figure 2.11 (next page) present the 1999 and 2012 annual per capita and median household income levels of Alexandria City and Arlington County residents. Figures for 1999 have been converted to 2012 constant dollars to adjust for inflation. Between 1999 and 2012, the annual per capita personal income level for Alexandria City residents increased by 6 percent from $49,449 to $52,160. Annual per capita personal income in Arlington County grew at a higher rate, increasing 19 percent from $49,529 to $58,906. Between 1999 and 2012, the annual median household income level for Alexandria City residents increased by 10 percent from $73,630 to $81,160, while the annual median household income level for Arlington County residents increased by 21 percent from $82,755 to $100,474.

Table 2.19. Annual Per Capita Income for Alexandria City and Arlington County Residents: 1999 and 2012

Jurisdiction	Annual Per Capita Income ($)		% Change from 1999 to 2012
	1999*	2012	
Alexandria City	49,449	52,160	5.5
Arlington County	49,529	58,906	18.9

Sources: U.S. Census Bureau, Census 2000, Table DP-3;
U.S. Census Bureau, 2012 American Community Survey, Table DP03
*U.S. Dollars for 1999 were converted to 2012 constant U.S. Dollars using the BEA Implicit Price Deflator

Table 2.20. Median Annual Household Income for Alexandria City and Arlington County: 1999 and 2012

Jurisdiction	Median Annual Household Income ($)		% Change from 1999 to 2012
	1999*	2012	
Alexandria City	73,630	81,160	10.2
Arlington County	82,755	100,474	21.4

Sources: U.S. Census Bureau, Census 2000, Table DP-3;
U.S. Census Bureau, 2012 American Community Survey, Table DP03
*U.S. Dollars for 1999 were converted to 2012 constant U.S. Dollars using the BEA Implicit Price Deflator

Figure 2.10. Annual Per Capita Income and Median Household Income for Alexandria City and Arlington County Residents: Percent Change from 1999 to 2012

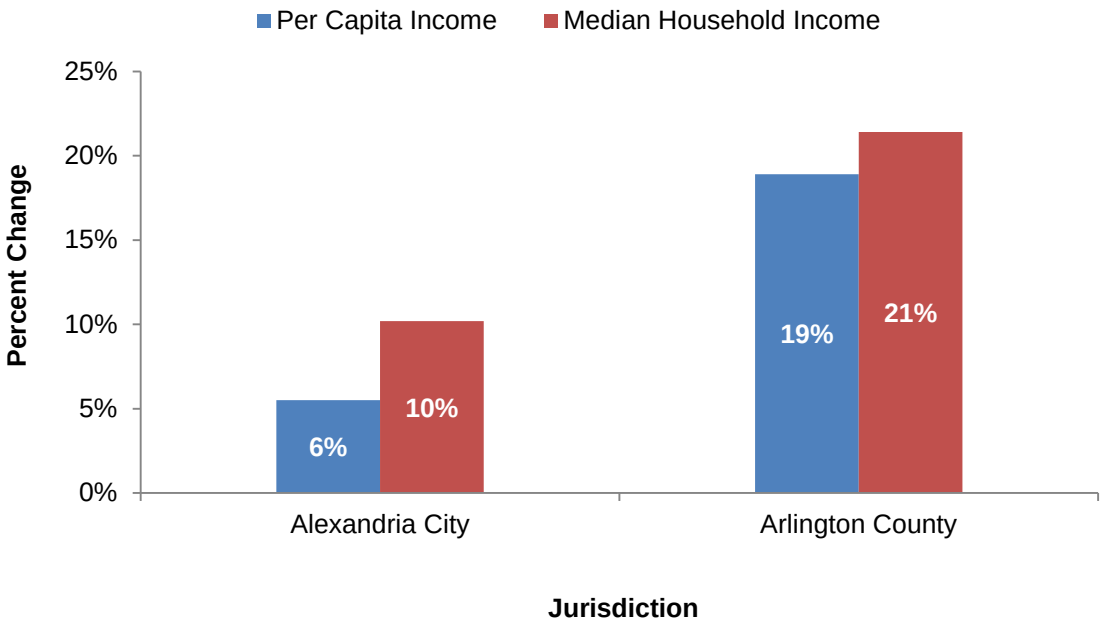


Table 2.21 and Figure 2.11 (both next page) present the distribution of annual household income levels for Alexandria City and Arlington County residents in 2012. In 2012, the largest proportion of Alexandria City households had annual income levels between $50,000 and $74,999 or between $100,000 and $149,999 (18 percent each). Approximately 41 percent of Alexandria City households reported annual incomes of $100,000 and over, while 11 percent reported an annual household income of less than $25,000.

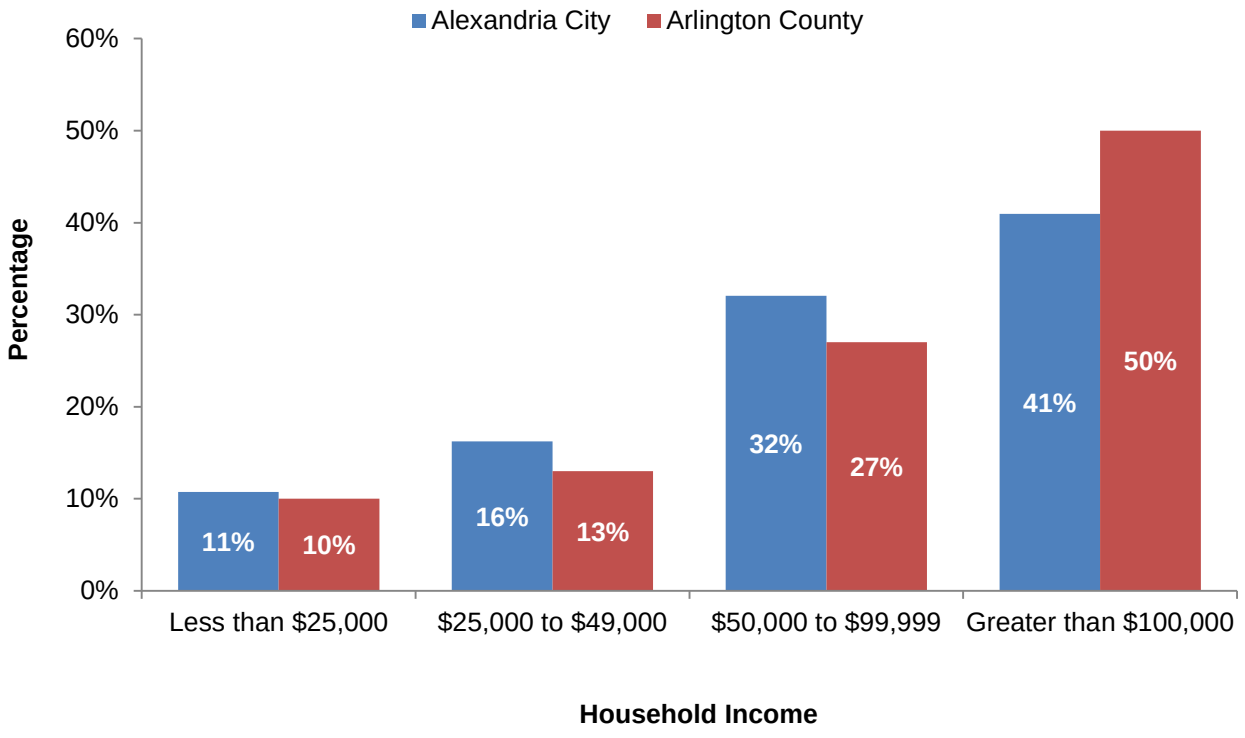
In 2012, the largest proportion of Arlington County households (19 percent) had annual income levels between $100,000 and $149,999, followed by residents with annual income levels greater than $200,000 (17 percent). Around 50 percent of Arlington County households reported an annual income of $100,000 and over, while 10 percent reported an annual household income of less than $25,000.

Table 2.21. Annual Household Income Distribution for Alexandria City and Arlington County Residents: 2012

Household Income and Benefits	Alexandria City Residents		Arlington County Residents	
	#	%	#	%
Less than $10,000	2,322	3.5	3,033	3.2
$10,000 to $14,999	1,689	2.6	1,914	2.0
$15,000 to $24,999	3,029	4.6	4,698	4.9
$25,000 to $34,999	3,250	5.0	4,308	4.5
$35,000 to $49,999	7,370	11.3	7,884	8.3
$50,000 to $74,999	12,043	18.4	12,957	13.6
$75,000 to $99,999	8,943	13.7	12,533	13.1
$100,000 to $149,999	11,689	17.9	18,107	19.0
$150,000 to $199,999	6,897	10.5	13,420	14.1
Greater than $200,000	8,236	12.6	16,515	17.3
Total Households	**65,468**	**100.0**	**95,369**	**100.0**

Source: U.S. Census Bureau, 2012 American Community Survey, Table DP03

Figure 2.11. Annual Household Income Distribution for Alexandria City and Arlington County Residents: 2012



VII. Real Estate

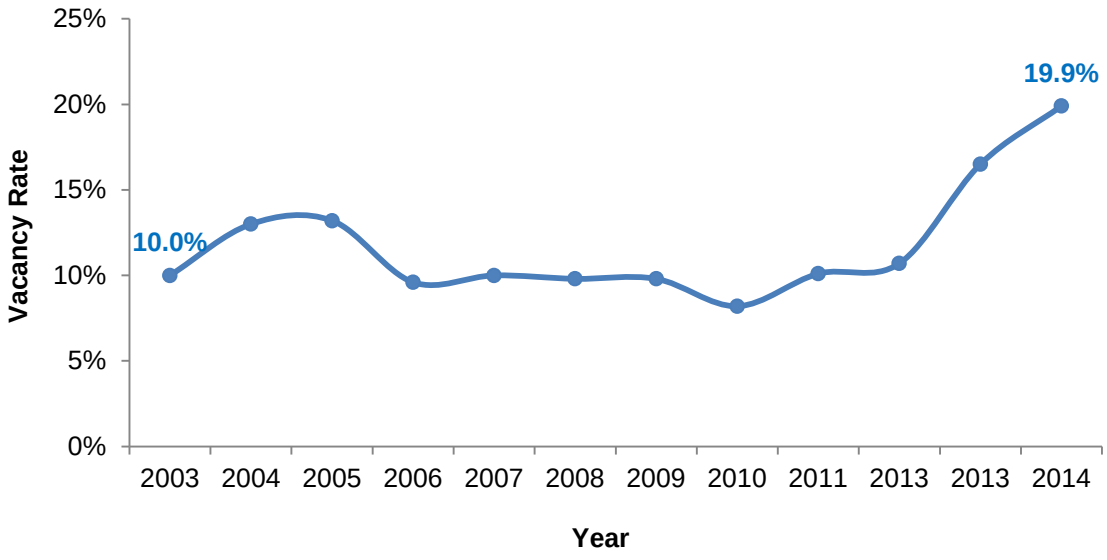
Table 2.22 and Figure 2.12 present data on office vacancy rates in Arlington County from 2003 through 2014. Office vacancy rate data for Alexandria City are not available. Between 2003 and 2005, office vacancy rates in Arlington County exhibited an upward trend, but then decreased from 2005 to 2010. Office vacancy rates in Arlington County reached a low of 8 percent in 2010 before beginning to increase again and reaching a 12-year high of 20 percent in 2014. There was an almost 10 percentage point increase in office vacancy rates between 2003 and 2014.

Table 2.22. Office Vacancy Rates for Arlington County: 2003 through 2014

Year	Office Vacancy Rates (%)
2003	10.0
2004	13.0
2005	13.2
2006	9.6
2007	10.0
2008	9.8
2009	9.8
2010	8.2
2011	10.1
2012	10.7
2013	16.5
2014	19.9

Source: Arlington County Government

Figure 2.12. Office Vacancy Rates for Arlington County: 2003 through 2014



The number and median price of housing units sold in Alexandria City and Arlington County are presented in Table 2.23 and Figures 2.13 and 2.14 (on next page). The number of housing units sold in Alexandria City and Arlington County increased significantly between 2000 and 2004 (a 30 percent increase for Alexandria City and a 32 percent increase for Arlington County). The number of housing units sold in both areas began to decrease in 2005 and reached a 14-year low in 2008. Between 2007 and 2008 the number of units sold decreased sharply from 2,284 to 1,826 in Alexandria City (-20 percent) and 3,092 to 2,391 in Arlington County (-23 percent). From 2008 to 2013, the number of housing units sold increased by 28 percent in Alexandria City and by 20 percent in Arlington County, but did not return to the 14-year high experienced in 2004.

All historical median housing prices presented have been converted to 2013 constant U.S. dollars in order to adjust for inflation. The median price of housing units sold in Alexandria City increased by 107 percent from $248,941 in 2000 to $516,116 in 2006. From 2006 to 2009, the median price of housing units sold in Alexandria City fell by over 13 percent to $445,557 before returning to an increasing trend and reaching a 14-year high of $520,000 in 2013 (a nearly 17 percent increase in median price from 2009 to 2013). The median price of housing units sold in Arlington County increased by 102 percent from $292,538 in 2000 to $590,972 in 2006. From 2006 to 2009, median housing prices for Arlington County decreased by 22 percent to $460,334 before returning to an increasing trend and reaching $535,000 in 2012 (a 16 percent increase in median price from 2009 to 2013).

Table 2.23. Number and Median Price of Housing Units Sold in Alexandria City and Arlington County: 2000 through 2013

Year	Alexandria City		Arlington County	
	# of Units Sold	Median Price ($)*	# of Units Sold	Median Price ($)*
2000	2,694	248,941	2,962	292,538
2001	2,958	280,192	3,062	356,771
2002	3,056	306,483	3,383	407,838
2003	3,233	369,088	3,648	414,917
2004	3,499	449,064	3,895	514,314
2005	3,239	504,711	3,481	561,447
2006	2,541	516,116	3,079	590,972
2007	2,284	504,414	3,092	532,925
2008	1,826	472,111	2,391	460,334
2009	1,990	445,557	2,678	484,568
2010	1,917	463,433	2,625	527,228
2011	1,903	474,204	2,270	543,939
2012	2,033	489,892	2,696	558,195
2013	2,330	520,000	2,870	535,000
% Change from 2000 to 2013	**-13.5**	**108.9**	**-3.1**	**82.9**

Source: Real Estate Business Intelligence
*All median prices of housing units have been converted to constant 2013 U.S. Dollars using BEA Implicit Price Deflator; median prices are from June of the specified year.

Figure 2.13. Number of Housing Units Sold in Alexandria City and Arlington County: 2000 through 2013

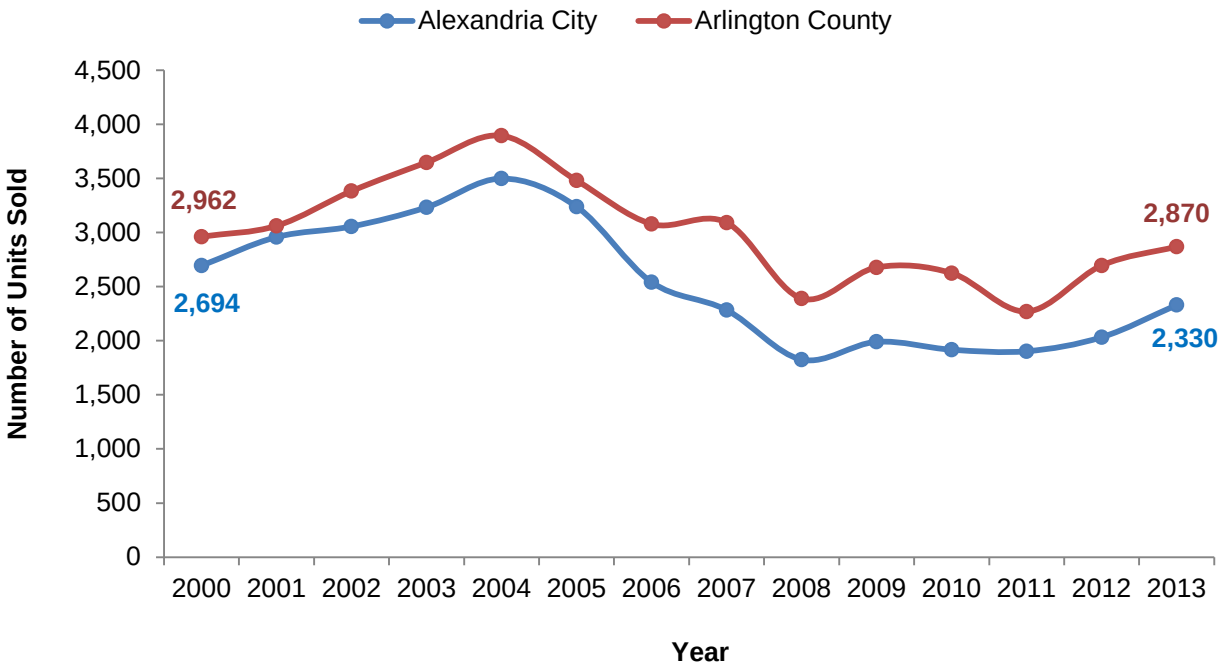
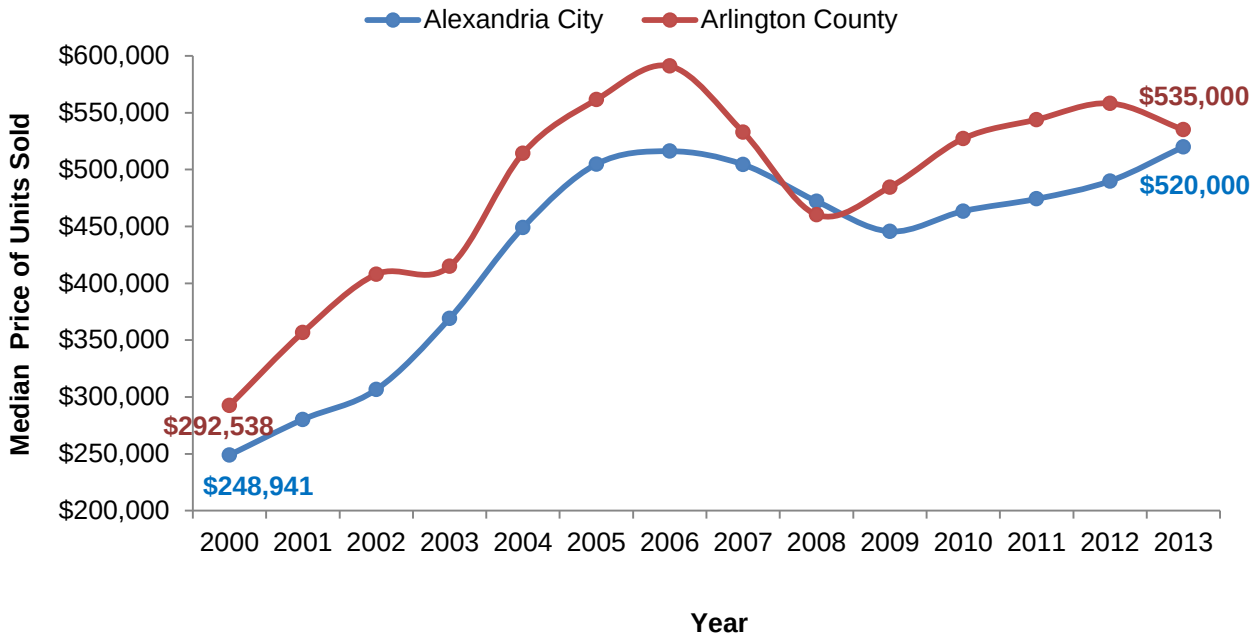
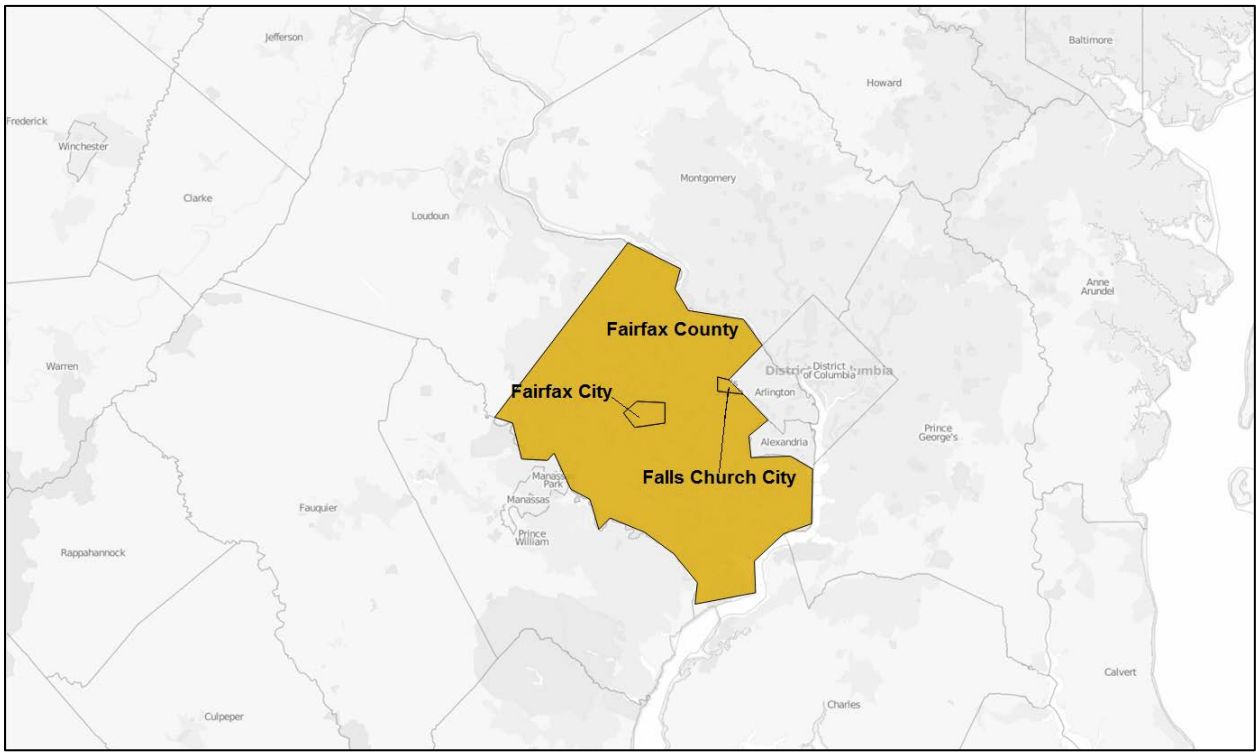


Figure 2.14. Median Price of Housing Units Sold in Alexandria City and Arlington County: 2000 through 2013



Chapter 3. Economic Profile of Fairfax County, Fairfax City, and Falls Church City



Chapter 3. Economic Profile of Fairfax County, Fairfax City, and Falls Church City

Summary

Population Growth and Demographic Shifts

- The populations in Fairfax County, Fairfax City, and Falls Church City all increased between 2001 and 2012. Fairfax County (which has the largest population of the three regions) experienced 13 percent population growth over this time period. The populations in Fairfax City and Falls Church City experienced 5 and 24 percent population growth, respectively.
- The populations in all three regions are expected to further increase between 2012 and 2021. The projected growth in all regions may present an opportunity for NOVA as more people in the service area may translate into more prospective students for the College.
- Between 2012 and 2021, age groups within the "traditional college-age", the 20 to 24 year old population and the 25 to 29 population, are projected to grow in all three regions. In Fairfax County, the 20 to 24 year old population is projected to grow 15 percent and the 25 to 29 population is projected to grow 5 percent between 2012 and 2021.
- In Fairfax County, the white population is projected to continue to be the largest race/ethnicity group in 2021 (49 percent), but it is projected to constitute a smaller proportion as compared to 2001 (64 percent). Between 2012 and 2021, the highest growth in Fairfax County is projected to occur among those of two or more races (26 percent), the Hispanic population (22 percent), and the Asian population (18 percent). All racial/ethnic groups in the region are projected to experience growth, with the exception of the white population (-0.6 percent).
- In Fairfax City, the white population will continue to be the majority, but it is projected to make up a smaller proportion in 2021 (54 percent) as compared to 2001 (68 percent). Projections for 2021 suggest that all racial/ethnic groups in the region will experience growth between 2012 and 2021, with the exception of the white population (-3 percent).
- In Falls Church City, the white population is projected to form the majority, but will make up a smaller proportion of the 2021 population (70 percent) as compared to 2001 (79 percent). All racial/ethnic groups are projected to experience growth in Falls Church City between 2012 and 2021, with the population who identify themselves with two or more races expected to grow 32 percent, the black population 26 percent, the Hispanic population 24 percent, and the Asian population 22 percent.

Educational Attainment

- The percentage of the population 25 years or older in Fairfax County with a Bachelor's degree or higher remained the same from 2001 to 2012 at 56 percent, and is projected to remain around that level in 2021 (55 percent). While the proportion with an Associate's degree has remained about 5 percent consistently and is expected to do so in 2021, the number of residents with an Associate's degree increased by 12 percent between 2001 and 2012, and is projected to increase an additional 7 percent between 2012 and 2021.

- The number of people in Fairfax County with no more than a high school diploma is projected to increase by 26,000 in 2021 (15 percent). The number of people in Fairfax County with at least some undergraduate education (an Associate's, Bachelor's, or some college) is projected to increase by 27,000 in 2021 (7 percent).
- In Fairfax City, the proportion of residents with a Bachelor's degree or higher increased from 47 percent of the population in 2001 to 55 percent of the population in 2012 and is expected to remain at that level in 2021. The proportion with an Associate's degree is projected to remain similar to historic levels (6-7 percent range). The number of residents with an Associate's degree increased by 20 percent between 2001 and 2012, and is projected to increase 5 percent between 2012 and 2021.
- The number of people in Fairfax City with no more than a high school diploma is projected to increase by 277 in 2021 (9 percent). The number of people in Fairfax City with at least some undergraduate education (an Associate's, Bachelor's, or some college) is projected to increase by 236 in 2021 (3 percent).
- The proportion of Falls Church City residents with a Bachelor's degree or higher increased from 65 percent in 2001 to 69 percent in 2012, and is projected to be 66 percent in 2021. The proportion with an Associate's degree is expected to remain relatively the same (3 to 4 percent range) in Falls Church City.
- The number of people in Falls Church City with no more than a high school diploma is projected to increase by 264 in 2021 (18 percent). The number of people in Fall Church City with at least some undergraduate education (an Associate's, Bachelor's, or some college) is projected to increase by 437 in 2021 (12 percent).

Economic Indicators

- From 2005 through 2010, federal government procurement increased by 84 percent to approximately $24 billion in Fairfax County. In contrast, it decreased by 91 percent to $229 million in Fairfax City and by 57 percent to $592 million in Falls Church City over the same time period.
- In 2012, the labor force participation rate was 73 percent in Fairfax County, 69 percent in Fairfax City, and 76 percent in Falls Church City. In the same year, the labor force participation rate was 67 percent in Virginia and 64 percent in the United States.
- In 2013, the unemployment rate was 4.3 percent in Fairfax County and 3.9 percent in both Fairfax City and Falls Church City, all of which were lower than the state unemployment rate (5.6 percent) and the national unemployment rate (7.4 percent).
- Per capita and median household income levels increased across all three regions. Per capita income increased by 2 percent in Fairfax County and by 7 percent each in Fairfax City and Falls Church City from 1999 to 2012.
- Across all three regions, the median price of homes sold has risen each year since 2010.

Employment Trends

- Between 2012 and 2021, the total number of jobs is projected to increase by 12 percent in both Fairfax County and Fairfax City and by 2 percent in Falls Church City.
- In Fairfax County, the largest percentage of workers was employed in the professional, scientific, and technical services industry in 2001 and 2012. Projections show that this industry will remain in the top position in 2021.
- In 2001, the largest percentage of Fairfax City workers was employed in the retail trade industry (20 percent). This changed in 2012, when the professional, scientific, and technical services industry employed the largest percentage of Fairfax City workers (22 percent). Projections show that the professional, scientific, and technical services industry will continue to hold the top position in 2021 (20 percent).
- In Falls Church City, the largest percentage of workers was employed by the government in 2001 (32 percent) and 2012 (21 percent). Projections show that this will remain in the top position for Falls Church City in 2021 (22 percent).
- In Fairfax County in 2012, the largest proportions of workers were employed in computer and mathematical jobs and office and administrative support jobs (each 14 percent). Projections show that in 2021 these two occupations will continue to employ the largest proportion of Fairfax County workers, with 14 percent of workers holding computer and mathematical jobs and 13 percent of workers holding office and administrative support jobs.
- The most populous occupations in Fairfax City in 2012 were office and administrative support jobs (14 percent), followed by employees in sales and related jobs (12 percent). Projections show that in 2021 these two occupations will continue to hold the largest proportion of Fairfax City workers.
- In 2012, the highest percentage of Falls Church City employees were employed in office and administrative support jobs (13 percent), followed by employees with computer and mathematical jobs (9 percent). Projections for 2021 show that the occupation of office and administrative support will continue to employ the highest percentage of Falls Church City employees (13 percent), followed by sales and related jobs and computer and mathematical jobs (each 9 percent).

I. Population

Table 3.1 presents population data for Fairfax County, Fairfax City, and Falls Church City in 2001, 2012, and projected figures for 2021. Between 2001 and 2012, the population in all three regions increased. Falls Church City, which has the smallest population, experienced the largest population growth (24 percent). Fairfax County's population grew by 13 percent, and Fairfax City's population grew by 5 percent. Projections for 2021 suggest that the populations across all three regions will continue to increase. Falls Church City will continue to grow faster than the other two regions at 15 percent growth between 2012 and 2021, Fairfax County is projected to grow 8 percent, and Fairfax City to grow 5 percent over the same time period.

Table 3.1. Fairfax County, Fairfax City, and Falls Church City Population: 2001, 2012, and 2021

Region	2001 Population	2012 Population	Change from 2001 to 2012		2021 Population*	Change from 2012 to 2021*	
			#	%		#	%
Fairfax County	991,551	1,117,208	125,657	12.7	1,210,356	93,148	8.3
Fairfax City	21,671	22,759	1,088	5.0	23,890	1,131	5.0
Falls Church City	10,547	13,119	2,572	24.4	15,055	1,936	14.8

Source: QCEW Employees - EMSI 2014.1 Class of Worker
*EMSI projections

Tables 3.2, 3.3, and 3.4 (next pages) provide the age distribution of the Fairfax County, Fairfax City, and Falls Church City populations in 2001, 2012, and projected figures for 2021. In Fairfax County, the 19 and under population constituted the largest group of the population in 2001 and 2012, and is projected to remain so in 2021. Between 2001 and 2012, all age groups experienced growth (ranging from 8 to 56 percent), with the exception of the population age 30 to 44 years, which experienced a 4 percent decrease. The population age 60 and over grew at the highest rate (56 percent) over this time period – accounting for about 16 percent of the 2012 population as compared to about 12 percent in 2001. Projections for 2021 indicate that the population age 60 and over will continue to grow at the highest rate in Fairfax County (29 percent). Future growth is also predicted for all other age groups, with the exception of the population age 45 to 59, which is expected to see a slight decrease in their overall population relative to 2012.

In Fairfax City, the 30 to 44 year old population constituted the largest group of the total population in 2001 (25 percent), but experienced a 16 percent decrease between 2001 and 2012, and constituted only 20 percent of the population in 2012. In contrast, all other age groups experienced growth (ranging from 7 to 24 percent) between 2001 and 2012. The population age 20 to 24 grew at the highest rate (24 percent) over this time period. Projections for 2021 suggest that the general age demographic of the 2021 population will be similar to 2012 proportionately. Projections suggest that the highest growth rate will occur among the population age 60 and over (16 percent growth). All other age groups are projected to grow, with the exception of the population group age 45 to 59 which is projected to experience a 4 percent decrease.

In Falls Church City, the populations age 19 and under, 30 to 44, and 45 to 59 constituted about equal proportions (24 to 25 percent) of the population in 2001. Between 2001 and 2012, all age groups experienced growth (ranging from 10 to 42 percent), with the population age 20 to 24 growing at the highest rate (42 percent growth). The population age 19 and younger experienced 37 percent growth, and accounted for 27 percent of the population in 2012. Projections for 2021 suggest that all age groups will continue to experience growth, with the exception of the population age 45 to 59.

Table 3.2. Fairfax County Population Disaggregated by Age: 2001, 2012, and 2021

Age Group	2001		2012		Change from 2001 to 2012		2021*		Change from 2012 to 2021*	
	#	%	#	%	#	%	#	%	#	%
19 and Under	272,033	27.4	293,927	26.3	21,894	8.0	316,023	26.1	22,096	7.5
20 to 24 Years	53,062	5.4	60,205	5.4	7,143	13.5	69,316	5.7	9,111	15.1
25 to 29 Years	69,626	7.0	80,789	7.2	11,163	16.0	85,126	7.0	4,337	5.4
30 to 44 Years	260,196	26.2	249,394	22.3	-10,802	-4.2	263,083	21.7	13,689	5.5
45 to 59 Years	219,977	22.2	250,522	22.4	30,545	13.9	242,543	20.0	-7,979	-3.2
60 and Over	116,657	11.8	182,371	16.3	65,714	56.3	234,265	19.4	51,894	28.5
Total	**991,551**	**100.0**	**1,117,208**	**100.0**	**125,657**	**12.7**	**1,210,356**	**100.0**	**93,148**	**8.3**

Source: QCEW Employees - EMSI 2014.1 Class of Worker
*EMSI projections

Table 3.3. Fairfax City Population Disaggregated by Age: 2001, 2012, and 2021

Age Group	2001		2012		Change from 2001 to 2012		2021*		Change from 2012 to 2021*	
	#	%	#	%	#	%	#	%	#	%
19 and Under	4,924	22.7	5,259	23.1	335	6.8	5,496	23.0	237	4.5
20 to 24 Years	1,647	7.6	2,043	9.0	396	24.0	2,243	9.4	200	9.8
25 to 29 Years	1,452	6.7	1,616	7.1	164	11.3	1,796	7.5	180	11.1
30 to 44 Years	5,443	25.1	4,570	20.1	-873	-16.0	4,586	19.2	16	0.4
45 to 59 Years	4,427	20.4	4,772	21.0	345	7.8	4,564	19.1	-208	-4.4
60 and Over	3,778	17.4	4,499	19.8	721	19.1	5,205	21.8	706	15.7
Total	**21,671**	**100.0**	**22,759**	**100.0**	**1,088**	**5.0**	**23,890**	**100.0**	**1,131**	**5.0**

Source: QCEW Employees - EMSI 2014.1 Class of Worker
*EMSI projections

Table 3.4. Falls Church City Population Disaggregated by Age: 2001, 2012, and 2021

Age Group	2001		2012		Change from 2001 to 2012		2021*		Change from 2012 to 2021*	
	#	%	#	%	#	%	#	%	#	%
19 and Under	2,621	24.9	3,596	27.4	975	37.2	4,343	28.8	747	20.8
20 to 24 Years	427	4.0	607	4.6	180	42.2	847	5.6	240	39.5
25 to 29 Years	671	6.4	823	6.3	152	22.7	1,064	7.1	241	29.3
30 to 44 Years	2,539	24.1	2,796	21.3	257	10.1	3,101	20.6	305	10.9
45 to 59 Years	2,591	24.6	3,076	23.4	485	18.7	2,866	19.0	-210	-6.8
60 and Over	1,698	16.1	2,221	16.9	523	30.8	2,834	18.8	613	27.6
Total	**10,547**	**100.0**	**13,119**	**100.0**	**2,572**	**24.4**	**15,055**	**100.0**	**1,936**	**14.8**

Source: QCEW Employees - EMSI 2014.1 Class of Worker
*EMSI projections

Tables 3.5, 3.6, and 3.7 provide a racial/ethnic breakdown of the populations in Fairfax County, Fairfax City, and Falls Church City in 2001, 2012, and projections for 2021. In Fairfax County, the majority of the population was white in 2001 and 2012, and the white population is projected to form the largest group in 2021. However, the proportion of the white population in Fairfax County declined from 64 percent in 2001 to 53 percent in 2012 and is projected to be 49 percent in 2021. The white population in Fairfax County experienced a 6 percent population decrease between 2001 and 2012, while all other racial/ethnic groups (except for American Indian or Native Alaskan) grew significantly. The population that identified as two or more races experienced the highest growth (73 percent) over this time period, the Hispanic population grew 58 percent, the Asian population grew 47 percent, and the black population grew 23 percent between 2001 and 2012. Projections for 2021 suggest that all non-white racial/ethnic groups will experience growth. Between 2012 and 2021, the population group identifying as two or more races is projected to experience the highest growth (26 percent), followed by the Hispanic population (22 percent), and the Asian population (18 percent).

In Fairfax City, the majority of the population was white in 2001 and 2012, and the white population is projected to continue to form the majority in 2021. Similar to Fairfax County, the proportion of the white population in Fairfax City declined from 68 percent in 2001 to 59 percent in 2012 and is projected to be 54 percent in 2021. The white population in Fairfax City experienced a 9 percent decrease between 2001 and 2012, while all other groups increased. The population identifying as two or more races experienced the highest growth between 2001 to 2012 (85 percent), followed by the Asian population (35 percent growth), and the Hispanic population (34 percent growth). Projections for 2021 suggest that the white population will continue to decline (-3 percent), while all other racial/ethnic groups will continue to experience growth. The population identifying as two or more races will continue to experience the highest growth (31 percent) between 2012 and 2021, followed by the black population (19 percent) and the Hispanic population (18 percent).

In Falls Church City, the white population formed the majority of the population in 2001 and 2012, and is projected to continue to form the majority in 2021. However, the proportion of the white population in Falls Church City declined from 79 percent in 2001 to 73 percent in 2012 and is projected to be 70 percent in 2021. All groups experienced growth between 2001 and 2012, with the exception of the very small population of Native Hawaiian or Pacific Islanders in the area. The population identifying as two or more races experienced the highest population growth between 2001 and 2012 (133 percent), followed by the Asian population (68 percent growth), and the black population (60 percent growth). Projections for 2021 suggest that the population of the larger racial/ethnic groups in the area will continue to increase. The population that identifies with two or more races is projected to grow the most (32 percent), followed by the black population (26 percent growth), and the Hispanic population (24 percent growth).

Table 3.5. Fairfax County Population Disaggregated by Race/Ethnicity: 2001, 2012, and 2021

Race/Ethnicity	2001		2012		Change from 2001 to 2012		2021*		Change from 2012 to 2021*	
	#	%	#	%	#	%	#	%	#	%
White	633,641	63.9	593,937	53.2	-39,704	-6.3	590,390	48.8	-3,547	-0.6
Black	84,472	8.5	104,262	9.3	19,790	23.4	116,307	9.6	12,045	11.6
Hispanic	114,602	11.6	181,296	16.2	66,694	58.2	221,337	18.3	40,041	22.1
Asian	137,339	13.9	202,403	18.1	65,064	47.4	238,576	19.7	36,173	17.9
American Indian or Alaskan Native	2,020	0.2	1,969	0.2	-51	-2.5	1,978	0.2	9	0.5
Native Hawaiian or Pacific Islander	675	0.1	868	0.1	193	28.6	952	0.1	84	9.7
Two or More Races	18,801	1.9	32,475	2.9	13,674	72.7	40,816	3.4	8,341	25.7
Total	**991,550**	**100.0**	**1,117,210**	**100.0**	**125,660**	**12.7**	**1,210,356**	**100.0**	**93,146**	**8.3**

Source: QCEW Employees - EMSI 2014.2 Class of Worker
*EMSI projections

Table 3.6. Fairfax City Population Disaggregated by Race/Ethnicity: 2001, 2012, and 2021

Race/Ethnicity	2001		2012		Change from 2001 to 2012		2021*		Change from 2012 to 2021*	
	#	%	#	%	#	%	#	%	#	%
White	14,662	67.7	13,355	58.7	-1,307	-8.9	12,943	54.2	-412	-3.1
Black	1,098	5.1	1,292	5.7	194	17.7	1,535	6.4	243	18.8
Hispanic	2,826	13.0	3,777	16.6	951	33.7	4,471	18.7	694	18.4
Asian	2,638	12.2	3,562	15.7	924	35.0	3,945	16.5	383	10.8
American Indian or Alaskan Native	58	0.3	71	0.3	13	22.4	82	0.3	11	15.5
Native Hawaiian or Pacific Islander	14	0.1	15	0.1	1	7.1	16	0.1	1	6.7
Two or More Races	372	1.7	687	3.0	315	84.7	898	3.8	211	30.7
Total	**21,668**	**100.0**	**22,759**	**100.0**	**1,091**	**5.0**	**23,890**	**100.0**	**1,131**	**5.0**

Source: QCEW Employees - EMSI 2014.2 Class of Worker
*EMSI projections

Table 3.7. Falls Church City Population Disaggregated by Race/Ethnicity: 2001, 2012, and 2021

Race/Ethnicity	2001		2012		Change from 2001 to 2012		2021*		Change from 2012 to 2021*	
	#	%	#	%	#	%	#	%	#	%
White	8,336	79.0	9,551	72.8	1,215	14.6	10,597	70.4	1,046	11.0
Black	384	3.6	615	4.7	231	60.2	774	5.1	159	25.9
Hispanic	861	8.2	1,209	9.2	348	40.4	1,502	10.0	293	24.2
Asian	739	7.0	1,244	9.5	505	68.3	1,521	10.1	277	22.3
American Indian or Alaskan Native	21	0.2	26	0.2	5	23.8	30	0.2	4	15.4
Native Hawaiian or Pacific Islander	7	0.1	5	<0.1	-2	-28.6	5	<0.1	0	0.0
Two or More Races	202	1.9	471	3.6	269	133.2	623	4.1	152	32.3
Total	**10,550**	**100.0**	**13,121**	**100.0**	**2,571**	**24.4**	**15,052**	**100.0**	**1,931**	**14.7**

Source: QCEW Employees - EMSI 2014.2 Class of Worker
*EMSI projections

II. Education

Table 3.8 and Figure 3.1 (both next page) provide data on the educational attainment levels of the Fairfax County population age 25 and older in 2000, 2012, and projections for 2021. In Fairfax County, the majority had a Bachelor's degree or higher in 2001 (56 percent), 2012 (56 percent), and is projected to remain so in 2021 (55 percent). The population with the highest level of education (graduate degree or higher) experienced among the highest rates of growth (21 percent) between 2001 and 2012, while the population with the lowest education level (less than 9th grade) experienced about a 1 percent decrease. Proportionately, the educational attainment levels of the population generally remained about the same in 2000 and 2012. The population with the highest educational level (graduate degree or higher) increased by about 2 percentage points. Projections for 2021 suggest that educational attainment levels of the population are likely to remain similar to 2012 levels. However, the population of those with a 9th to 12th grade education will likely experience the highest growth in Fairfax County (31 percent) between 2012 and 2021, and account for 6 percent of the population in 2021 as compared to 5 percent in 2012.

Table 3.8. Educational Attainment of Fairfax County Population Age 25 and Older: 2001, 2012, and 2021

Educational Attainment	2001		2012		% Change from 2001 to 2012	2021*		% Change from 2012 to 2021*
	#	%	#	%		#	%	
Less Than 9th Grade	29,338	4.4	29,122	3.8	-0.7	30,208	3.7	3.7
9th Grade to 12th Grade	30,479	4.6	40,000	5.2	31.2	52,414	6.4	31.0
High School Diploma	93,179	14.0	109,616	14.4	17.6	122,158	14.8	11.4
Some College	108,317	16.3	116,263	15.2	7.3	128,033	15.5	10.1
Associate's Degree	34,818	5.2	39,025	5.1	12.1	41,709	5.1	6.9
Bachelor's Degree	203,433	30.5	226,988	29.7	11.6	239,537	29.0	5.5
Graduate Degree and Higher	166,893	25.0	202,063	26.5	21.1	210,958	25.6	4.4
Population Age 25 and Older	**666,456**	**100.0**	**763,077**	**100.0**	**14.5**	**825,018**	**100.0**	**8.1**

Source: QCEW Employees - EMSI 2014.2 Class of Worker
*EMSI projections

Figure 3.1. Educational Attainment of Fairfax County Population Age 25 and Older by Education Level: 2001, 2012, and 2021

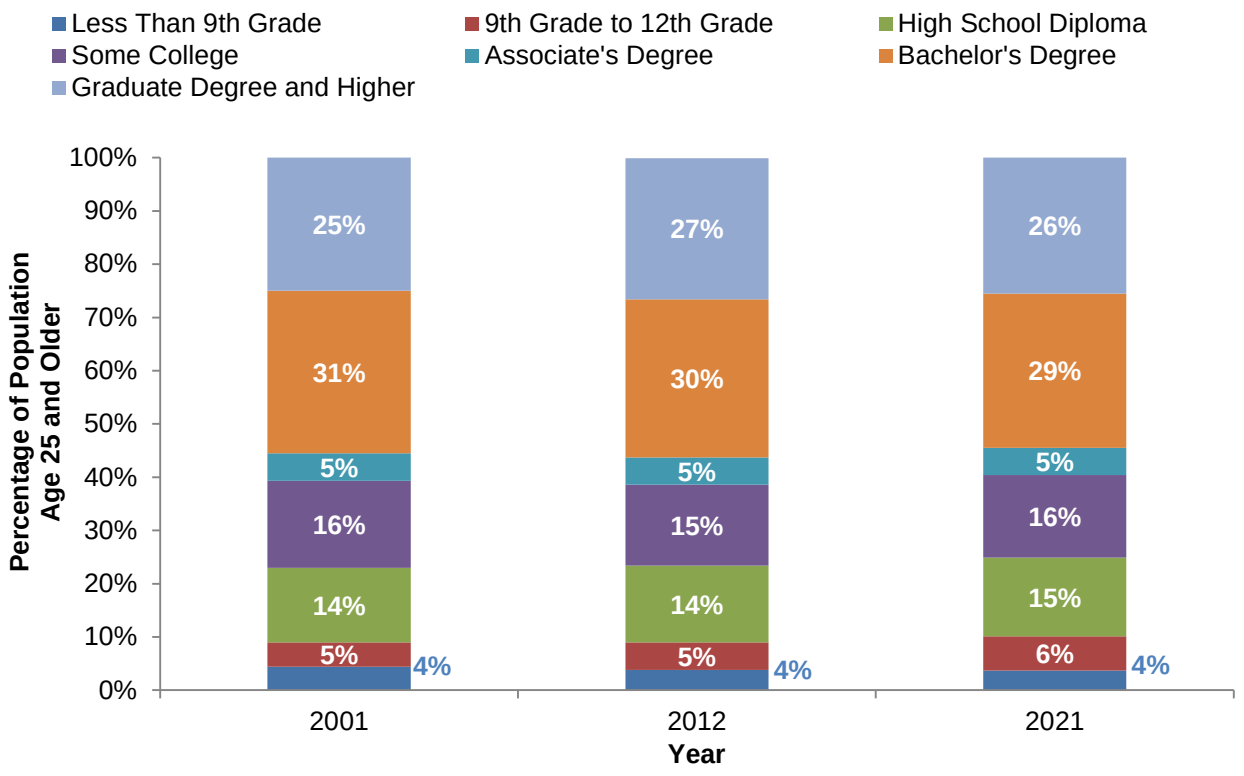


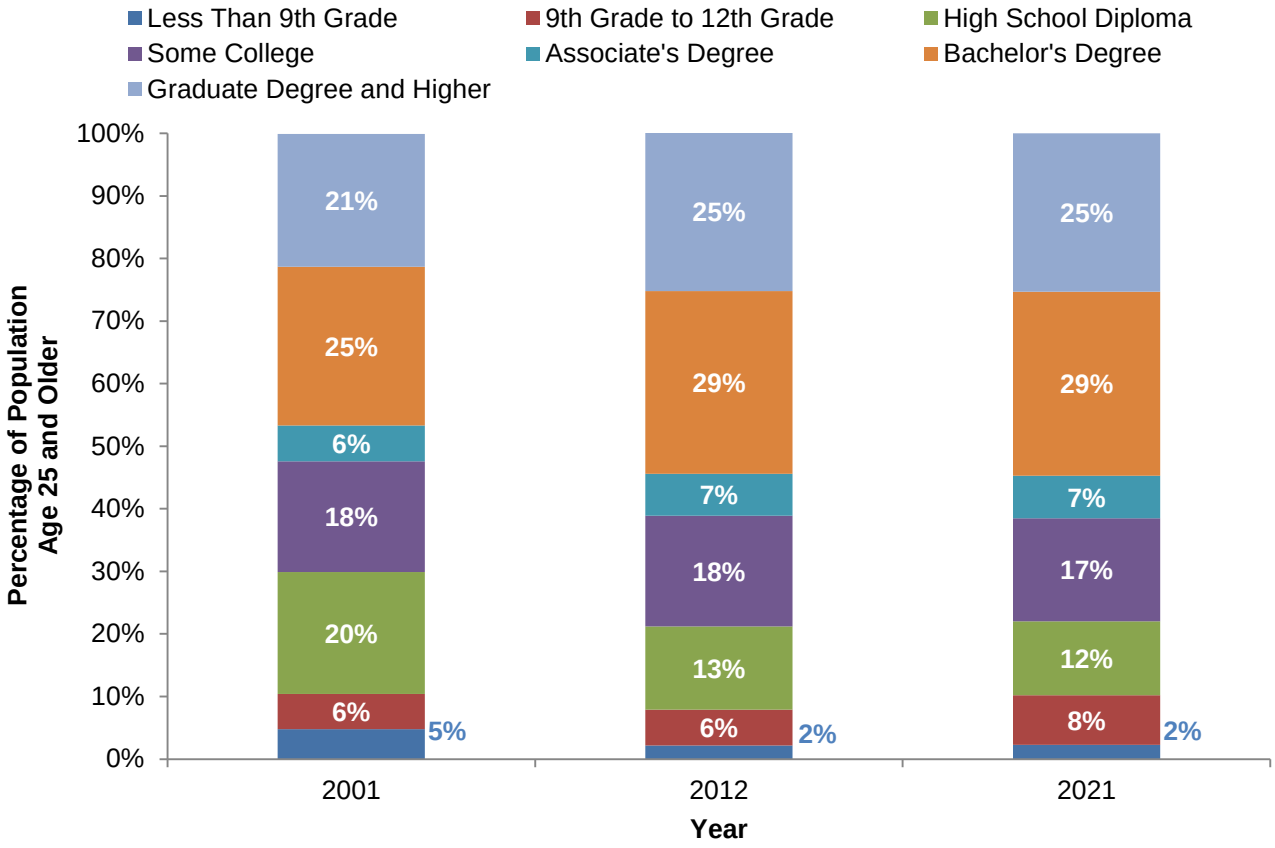
Table 3.9 and Figure 3.2 (next page) provide data on the educational attainment levels of the Fairfax City population age 25 and older in 2000, 2012, and projections for 2021. The proportion of the population with a Bachelor's degree or higher increased from 47 percent in 2001 to 55 percent in 2012. The proportion of the population with an Associate's degree increased from 6 percent in 2001 to 7 percent in 2012. The number of Fairfax City residents with an Associate's degree grew by 20 percent between 2001 and 2012, while the number with a Bachelor's degree increased 18 percent, and the number with a graduate degree increased 22 percent. In contrast, the population with less than a ninth grade education decreased 52 percent and the group with a high school diploma as their maximum level of educational attainment decreased 30 percent. Projections for 2021 suggest that the educational attainment levels of the population will generally remain similar to 2012 levels, with proportionate changes only occurring among those with a high school diploma (2 percentage point decrease) and those with a 9th to 12 grade education (2 percentage point increase).

Table 3.9. Educational Attainment of Fairfax City Population Age 25 and Older: 2001, 2012, and 2021

Educational Attainment	2001		2012		% Change from 2001 to 2012	2021*		% Change from 2012 to 2021*
	#	%	#	%		#	%	
Less Than 9th Grade	724	4.8	345	2.2	-52.3	372	2.3	7.8
9th Grade to 12th Grade	850	5.6	875	5.7	2.9	1,280	7.9	46.3
High School Diploma	2,946	19.5	2,053	13.3	-30.3	1,898	11.8	-7.5
Some College	2,672	17.7	2,730	17.7	2.2	2,670	16.5	-2.2
Associate's Degree	867	5.7	1,037	6.7	19.6	1,093	6.8	5.4
Bachelor's Degree	3,835	25.4	4,510	29.2	17.6	4,750	29.4	5.3
Graduate Degree and Higher	3,204	21.2	3,908	25.3	22.0	4,088	25.3	4.6
Population Age 25 and Older	**15,098**	**100.0**	**15,457**	**100.0**	**2.4**	**16,152**	**100.0**	**4.5**

Source: QCEW Employees - EMSI 2014.2 Class of Worker
*EMSI projections

Figure 3.2. Educational Attainment of Fairfax City Population Age 25 and Older by Education Level: 2001, 2012, and 2021



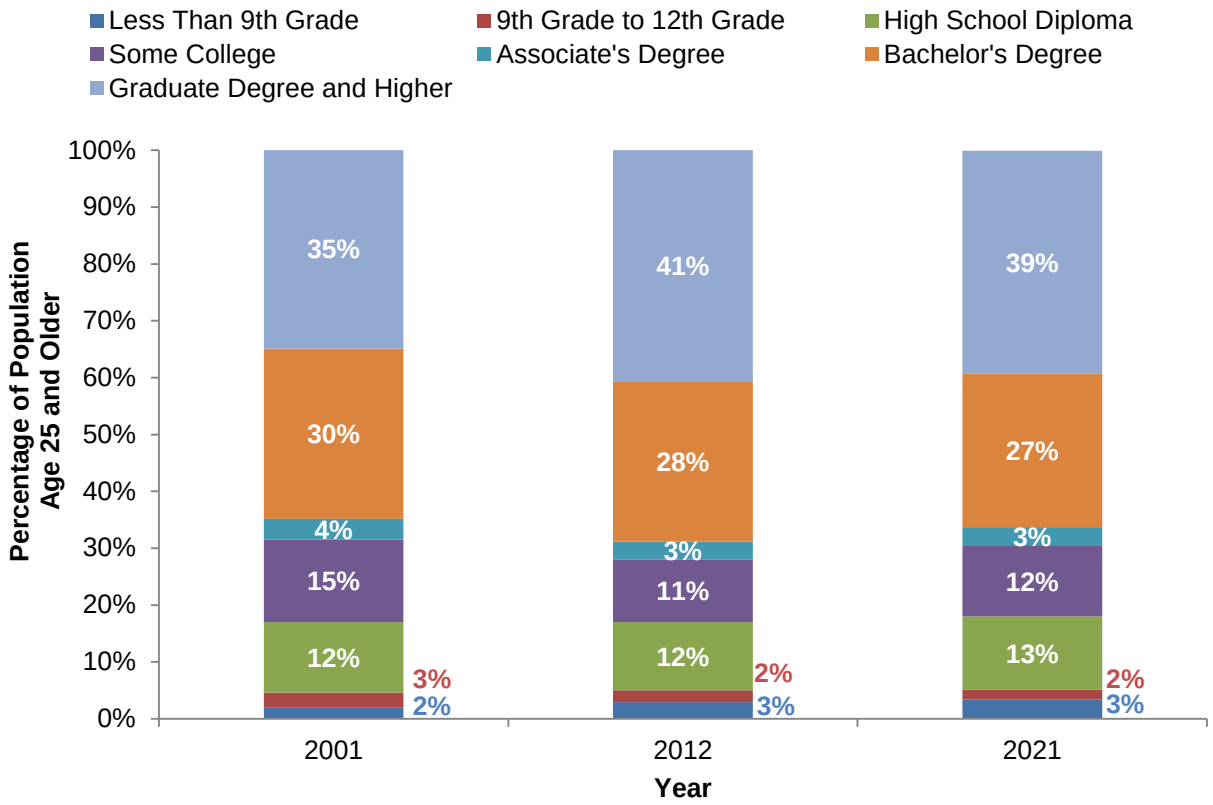
Data for Falls Church City (Table 3.10, Figure 3.3, both on next page) show that the majority of the population held a Bachelor's degree or higher in 2001 (65 percent), in 2012 (69 percent), and is projected to do so in 2021 (66 percent). The population with the highest level of education (graduate degree or higher) experienced 38 percent growth between 2001 and 2012, and constituted 41 percent of the Falls Church City population in 2012 as compared to 35 percent in 2001. Projections for 2021 suggest that educational attainment levels in the region are likely to remain similar to 2012 levels.

Table 3.10. Educational Attainment of Falls Church City Population Age 25 and Older: 2001, 2012, and 2021

Educational Attainment	2001		2012		% Change from 2001 to 2012	2021*		% Change from 2012 to 2021*
	#	%	#	%		#	%	
Less Than 9th Grade	147	2.0	256	2.9	74.1	334	3.4	30.5
9th Grade to 12th Grade	195	2.6	188	2.1	-3.6	166	1.7	-11.7
High School Diploma	927	12.4	1,067	12.0	15.1	1,275	12.9	19.5
Some College	1,085	14.5	979	11.0	-9.8	1,223	12.4	24.9
Associate's Degree	274	3.7	288	3.2	5.1	329	3.3	14.2
Bachelor's Degree	2,240	29.9	2,515	28.2	12.3	2,667	27.0	6.0
Graduate Degree and Higher	2,633	35.1	3,625	40.7	37.7	3,870	39.2	6.8
Population Age 25 and Older	**7,501**	**100.0**	**8,918**	**100.0**	**18.9**	**9,864**	**100.0**	**10.6**

Source: QCEW Employees - EMSI 2014.2 Class of Worker
*EMSI projections

Figure 3.3. Educational Attainment of Falls Church City Population Age 25 and Older by Education Level: 2001, 2012, and 2021



III. Employment

Table 3.11 presents data on the employment status of the Fairfax County population in 2000 and 2012. In Fairfax County, both the total working age population (population age 16 years and over) and the civilian labor force grew by 18 percent between 2000 and 2012. The civilian labor force accounted for 72 percent of the total working age population in 2000 and 2012. The armed forces population decreased by 4 percent between 2000 and 2012, but continued to represent slightly less than 2 percent of the total working age population.

Table 3.11. Employment Status of Fairfax County Population Age 16 and Older: 2000 and 2012

Employment Status	2000		2012		% Change from 2000 to 2012
	#	%	#	%	
Civilian Labor Force	536,360	71.5	634,350	71.9	18.3
Employed	522,398	–	606,250	–	16.1
Unemployed	13,962	–	28,100	–	101.3
Not in Labor Force	201,624	26.9	235,472	26.7	16.8
Armed Forces	12,452	1.7	11,920	1.4	-4.3
Population Age 16 and Older	**750,436**	**100.0**	**881,742**	**100.0**	**17.5**

Sources: U.S. Census Bureau, Census 2000, Table DP-3; U.S. Census Bureau, 2012 American Community Survey, Table DP03

Table 3.12 presents data on the employment status of the Fairfax City Population in 2000 and 2012. In Fairfax City, the working age population grew by 7 percent while the civilian labor force grew by 6 percent between 2000 and 2012. The civilian labor force accounted for 69 percent of the working age population in 2000 and decreased to 68 percent in 2012. The armed forces population experienced a 76 percent decrease between 2000 and 2012, going from representing slightly less than 1 percent to less than half a percent of the total working age population.

Table 3.12. Employment Status of Fairfax City Population Age 16 and Older: 2000 and 2012

Employment Status	2000		2012		% Change from 2000 to 2012
	#	%	#	%	
Civilian Labor Force	12,213	69.0	12,965	68.4	6.2
Employed	11,924	–	12,118	–	1.6
Unemployed	289	–	847	–	193.1
Not in Labor Force	5,329	30.1	5,949	31.4	11.6
Armed Forces	148	0.8	35	0.2	-76.4
Population Age 16 and Older	**17,690**	**100.0**	**18,949**	**100.0**	**7.1**

Sources: U.S. Census Bureau, Census 2000, Table DP-3; U.S. Census Bureau, 2012 American Community Survey, Table DP03

Table 3.13 presents data on the employment status of the Falls Church City population in 2000 and 2012. In Falls Church City, the working age population grew by 16 percent and the civilian labor force grew by 19 percent between 2000 and 2012. As a percentage of the total working age population, the civilian labor force increased from 73 to 75 percent. The armed forces population grew by 85 percent between 2000 and 2012, but as a proportion of the total working age population, remained under 1 percent. Figure 3.4 depicts the employment status of the populations in Fairfax County, Fairfax City and Falls Church City in 2012.

Table 3.13. Employment Status of Falls Church City Population Age 16 and Older: 2000 and 2012

Employment Status	2000		2012		% Change from 2000 to 2012
	#	%	#	%	
Civilian Labor Force	6,033	73.0	7,192	75.3	19.2
Employed	5,857	–	6,782	–	15.8
Unemployed	176	–	410	–	133.0
Not in Labor Force	2,190	26.5	2,281	23.9	4.2
Armed Forces	39	0.5	72	0.8	84.6
Population Age 16 and Older	**8,262**	**100.0**	**9,545**	**100.0**	**15.5**

Sources: U.S. Census Bureau, Census 2000, Table DP-3; U.S. Census Bureau, 2012 American Community Survey, Table DP03

Figure 3.4. Employment Status of Fairfax County, Fairfax City, and Falls Church City Population Age 16 and Older: 2012

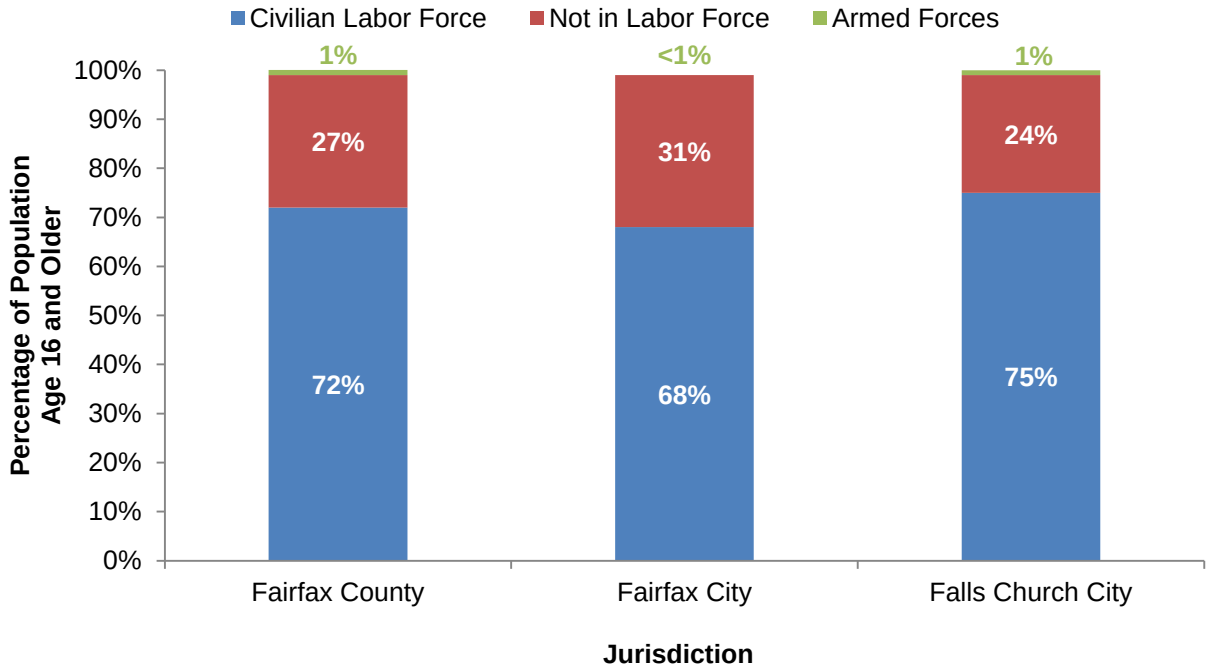


Table 3.14 presents labor force participation rates in Fairfax County, Fairfax City, Falls Church City, Virginia, and the United States in 2012. The labor force participation rate in all the counties was higher than the Virginia state (67 percent) and national (64 percent) labor force participation rates. The labor force participation rate was highest in Falls Church City (76 percent), followed by Fairfax County (73 percent), and then Fairfax City (69 percent).

Table 3.14. Labor Force Participation Rates in Fairfax County, Fairfax City, Falls Church City, Virginia, and the United States: 2012

Area	Civilian Labor Force	Civilian Population Age 16 and Older	Labor Force Participation Rate (%)
Fairfax County	634,350	869,822	72.9
Fairfax City	12,965	18,914	68.5
Falls Church City	7,192	9,473	75.9
Virginia	4,221,840	6,318,183	66.8
United States	154,975,000	243,284,000	63.7

Sources: U.S. Census Bureau, 2012 American Community Survey (county level data)
U.S. Bureau of Labor Statistics, States and Selected Areas (state data) and Labor Force Statistics from the Current Population Survey (national data)

Table 3.15 and Figure 3.5 (next page) present unemployment rates from 2000 through 2013 for Fairfax County, Fairfax City, Falls Church City, Virginia, and the United States. In all the years presented, Fairfax County and Fairfax City experienced unemployment rates below the state and national average. Between 2005 and 2009, Falls Church City experienced unemployment rates similar to the state average; however in all other years, the unemployment rate in Falls Church City was below the state average. While unemployment fluctuated throughout the years, it peaked around 2009 at 5.0 percent in Fairfax County, 5.8 percent in Fairfax City, and 7.2 percent in Falls Church City. Between 2010 and 2013, unemployment was on a decreasing trend, but in 2013 unemployment still stood over twice the rate it was in 2000 in all regions.

Table 3.15. Unemployment Rates for Fairfax County, Fairfax City, Falls Church City, Virginia, and the United States: 2000 through 2013

Year	Unemployment Rate (%)				
	Fairfax County	Fairfax City	Falls Church City	Virginia	United States
2000	1.6	1.3	1.6	2.3	4.0
2001	2.5	1.6	2.7	3.2	4.7
2002	3.4	2.2	3.4	4.2	5.8
2003	3.1	2.7	3.2	4.1	6.0
2004	2.7	2.7	3.2	3.7	5.5
2005	2.5	2.6	3.3	3.5	5.1
2006	2.2	2.4	2.9	3.1	4.6
2007	2.2	2.6	3.1	3.1	4.6
2008	2.8	3.2	4.0	4.0	5.8
2009	5.0	5.8	7.2	7.0	9.3
2010	5.1	5.0	4.4	7.1	9.6
2011	4.7	4.8	4.3	6.4	8.9
2012	4.4	4.1	4.0	5.9	8.1
2013	4.3	3.9	3.9	5.6	7.4

Source: U.S. Bureau of Labor Statistics, Local Area Unemployment

Figure 3.5. Unemployment Rates for Fairfax County and Fairfax City: 2000 through 2013

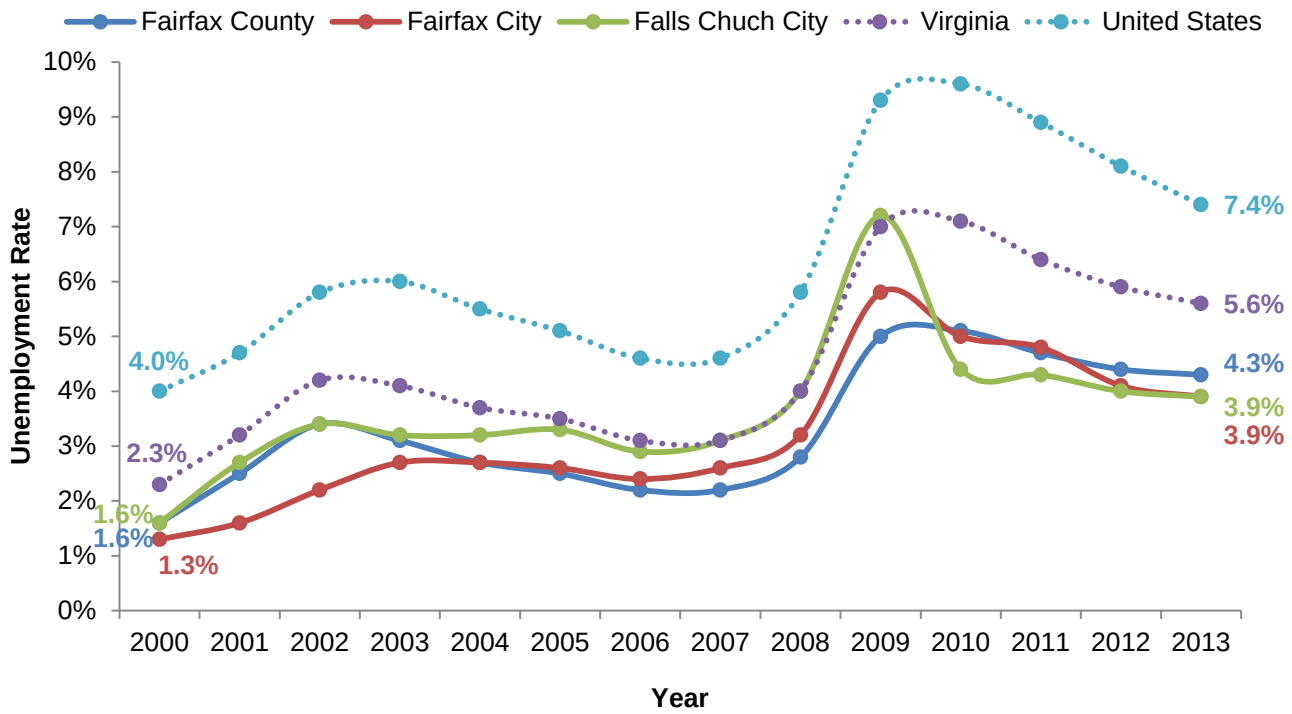


Table 3.16 (below) and Figure 3.6 (next page) present data on employment by type of industry for Fairfax County in 2001 and 2012. Projections are provided for the year 2021. In Fairfax County, the largest percentage of workers was employed in the professional, scientific, and technical services industry in 2001 (21 percent) and 2012 (27 percent). Projections show that this industry will remain in the top position in 2021 (29 percent). Government and retail trade employed the next largest percentages of workers in 2012 (14 and 9 percent, respectively) and are projected to continue to do so in 2021 (13 and 8 percent, respectively).

Table 3.16. Employment by Industry for Fairfax County: 2001, 2012, and 2021

Industry	2001		2012		% Change from 2001 to 2012	2021*		% Change from 2012 to 2021*
	#	%	#	%		#	%	
Accommodation and Food Services	34,219	6.3	39,701	6.7	16.0	44,234	6.7	11.4
Administrative and Support and Waste Management and Remediation Services	39,468	7.3	38,073	6.4	-3.5	42,267	6.4	11.0
Agriculture, Forestry, Fishing and Hunting	122	<0.1	50	<0.1	-58.8	23	<0.1	-54.2
Arts, Entertainment, and Recreation	6,783	1.2	7,574	1.3	11.7	8,335	1.3	10.0
Construction	31,513	5.8	25,090	4.2	-20.4	30,565	4.6	21.8
Educational Services (Private)	6,157	1.1	10,393	1.8	68.8	14,639	2.2	40.9
Finance and Insurance	21,461	4.0	22,911	3.9	6.8	25,304	3.8	10.4
Government	65,272	12.0	81,371	13.8	24.7	86,373	13.1	6.1
Health Care and Social Assistance	36,814	6.8	47,761	8.1	29.7	60,135	9.1	25.9
Information	47,164	8.7	21,711	3.7	-54.0	15,267	2.3	-29.7
Management of Companies and Enterprises	15,814	2.9	22,152	3.8	40.1	24,348	3.7	9.9
Manufacturing	12,980	2.4	8,459	1.4	-34.8	4,888	0.7	-42.2
Mining, Quarrying, and Oil and Gas Extraction	94	<0.1	221	<0.1	136.7	345	0.1	55.8
Other Services (except Public Administration)	20,311	3.7	20,814	3.5	2.5	22,213	3.4	6.7
Professional, Scientific, and Technical Services	115,647	21.3	161,160	27.3	39.4	192,607	29.2	19.5
Real Estate and Rental and Leasing	9,317	1.7	9,088	1.5	-2.5	10,508	1.6	15.6
Retail Trade	54,287	10.0	52,633	8.9	-3.0	55,078	8.4	4.6
Transportation and Warehousing	7,333	1.4	6,324	1.1	-13.8	7,342	1.1	16.1
Unclassified Industry	<10	<0.1	0	0.0	–	<10	<0.1	–
Utilities	1,545	0.3	1,007	0.2	-34.8	858	0.1	-14.8
Wholesale Trade	16,669	3.1	13,914	2.4	-16.5	13,518	2.1	-2.9
Total	**542,972**	**100.0**	**590,408**	**100.0**	**8.7**	**658,852**	**100.0**	**11.6**

Source: EMSI, Table 2014.2 – QCEW Employees
*EMSI Projections

Figure 3.6. Top 10 Industries in Fairfax County by Number of Jobs: 2012

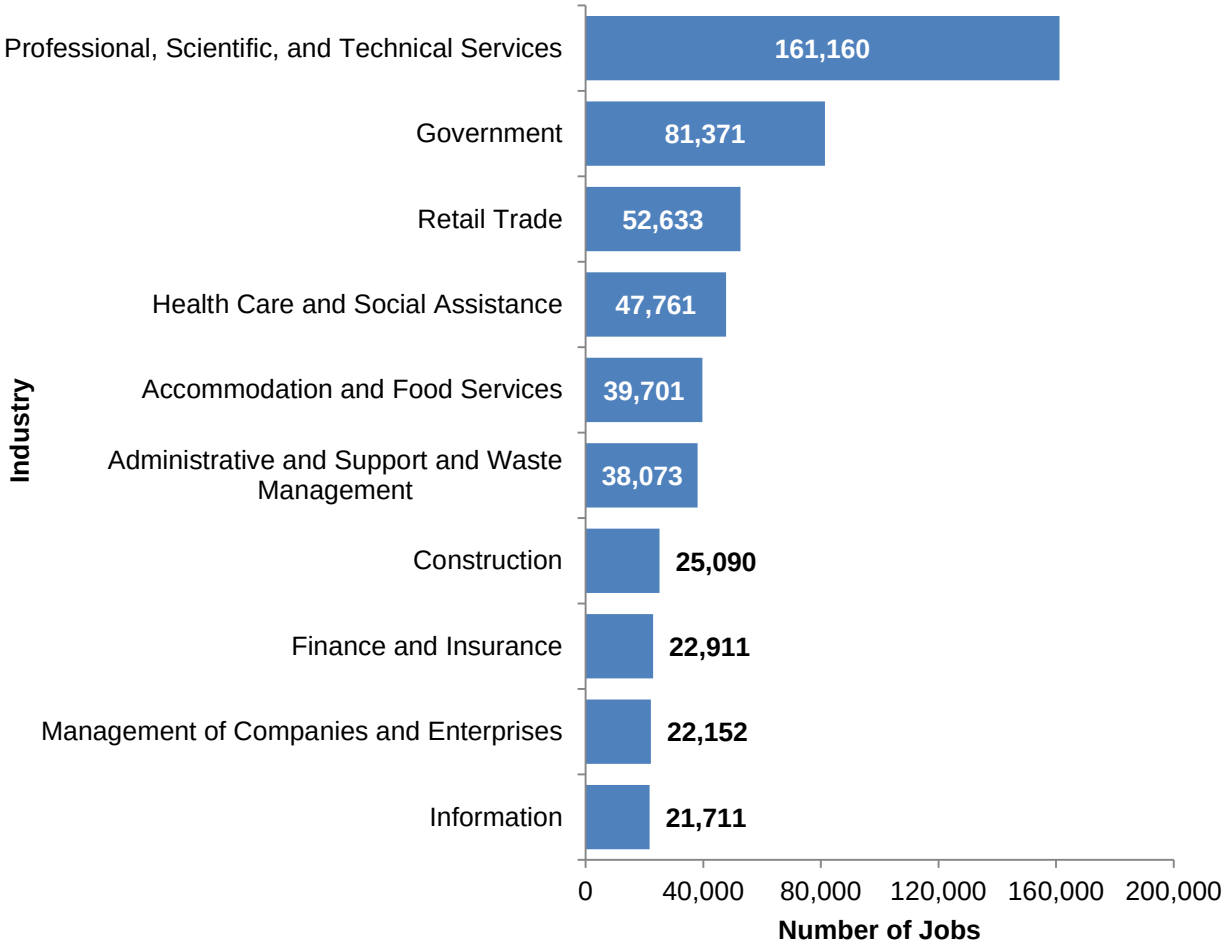


Table 3.17 (next page) and Figure 3.7 (following page) present data on employment by type of industry for Fairfax City in 2001 and 2012. Projections are provided for the year 2021. In 2001, the largest percentage of Fairfax City workers was employed in the retail trade industry (20 percent). This changed in 2012, when the professional, scientific, and technical services industry (22 percent) employed the largest percentage of Fairfax City workers. Projections show that the professional, scientific, and technical services industry will continue to hold the top position in 2021 (20 percent), followed by the retail trade at 17 percent, and health care and social assistance at 16 percent.

Table 3.17. Employment by Industry in Fairfax City: 2001, 2012, and 2021

Industry	2001		2012		% Change from 2001 to 2012	2021*		% Change from 2012 to 2021*
	#	%	#	%		#	%	
Accommodation and Food Services	1,739	10.1	2,040	10.3	17.3	2,472	11.2	21.2
Administrative and Support and Waste Management and Remediation Services	1,007	5.9	1,340	6.8	33.1	1,785	8.1	33.2
Arts, Entertainment, and Recreation	203	1.2	358	1.8	76.8	543	2.5	51.7
Construction	1,189	6.9	652	3.3	-45.2	796	3.6	22.1
Educational Services (Private)	68	0.4	370	1.9	443.8	459	2.1	23.9
Finance and Insurance	962	5.6	825	4.2	-14.3	747	3.4	-9.5
Government	1,310	7.6	1,790	9.1	36.6	1,448	6.6	-19.1
Health Care and Social Assistance	1,584	9.2	2,674	13.6	68.8	3,546	16.1	32.6
Information	683	4.0	320	1.6	-53.1	235	1.1	-26.5
Management of Companies and Enterprises	107	0.6	142	0.7	32.3	138	0.6	-2.8
Manufacturing	123	0.7	92	0.5	-25.3	75	0.3	-18.9
Other Services (except Public Administration)	712	4.1	898	4.6	26.2	1,116	5.1	24.2
Professional, Scientific, and Technical Services	3,079	17.9	4,273	21.7	38.8	4,315	19.6	1.0
Real Estate and Rental and Leasing	469	2.7	180	0.9	-61.6	180	0.8	0.1
Retail Trade	3,466	20.2	3,270	16.6	-5.7	3,836	17.4	17.3
Transportation and Warehousing	191	1.1	264	1.3	38.4	213	1.0	-19.5
Utilities	25	0.1	81	0.4	224.7	15	0.1	-81.3
Wholesale Trade	270	1.6	151	0.8	-44.2	113	0.5	-25.1
Total	**17,188**	**100.0**	**19,720**	**100.0**	**14.7**	**22,032**	**100.0**	**11.7**

Source: EMSI, Table 2014.2 – QCEW Employees
*EMSI Projections

Figure 3.7. Top 10 Industries in Fairfax City by Number of Jobs: 2012

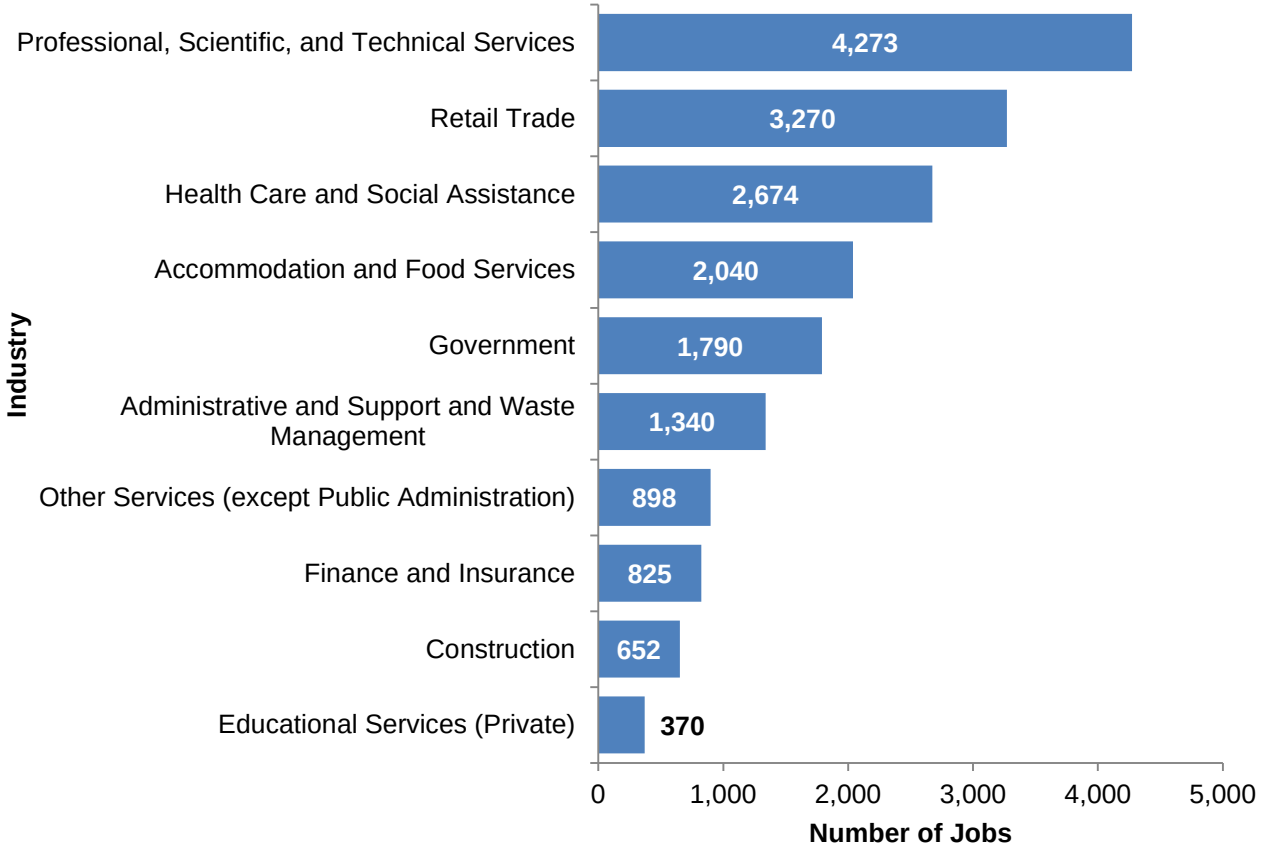


Table 3.18 (next page) and Figure 3.8 (following page) present data on employment by type of industry for Falls Church City in 2001 and 2012. Projections are provided for the year 2021. In this jurisdiction, the largest percentage of workers was employed by the government in 2001 (32 percent) and 2012 (21 percent). Projections show that government will remain in the top position for Falls Church City in 2021 (22 percent), followed by health care and social assistance (15 percent), and professional, scientific, and technical services (15 percent).

Table 3.18. Employment by Industry in Falls Church City: 2001, 2012, and 2021

Industry	2001		2012		% Change from 2001 to 2012	2021*		% Change from 2012 to 2021*
	#	%	#	%		#	%	
Accommodation and Food Services	919	6.5	879	7.8	-4.4	843	7.4	-4.1
Administrative and Support and Waste Management and Remediation Services	908	6.4	1,177	10.5	29.6	795	7.0	-32.4
Arts, Entertainment, and Recreation	52	0.4	126	1.1	140.3	264	2.3	109.7
Construction	826	5.8	334	3.0	-59.6	267	2.3	-20.0
Educational Services (Private)	255	1.8	213	1.9	-16.5	292	2.6	37.3
Finance and Insurance	196	1.4	163	1.5	-17.0	149	1.3	-8.4
Government	4,545	32.1	2,295	20.5	-49.5	2,544	22.4	10.8
Health Care and Social Assistance	1,889	13.3	1,756	15.7	-7.0	1,730	15.2	-1.5
Information	393	2.8	275	2.5	-30.0	305	2.7	10.9
Management of Companies and Enterprises	64	0.5	57	0.5	-11.5	59	0.5	3.5
Manufacturing	242	1.7	60	0.5	-75.0	50	0.4	-16.7
Other Services (except Public Administration)	674	4.8	732	6.5	8.5	794	7.0	8.5
Professional, Scientific, and Technical Services	1,177	8.3	1,659	14.8	40.9	1,652	14.5	-0.4
Real Estate and Rental and Leasing	180	1.3	140	1.3	-22.2	172	1.5	22.9
Retail Trade	1,584	11.2	1,121	10.0	-29.2	1,202	10.6	7.2
Transportation and Warehousing	100	0.7	99	0.9	-1.0	109	1.0	10.1
Wholesale Trade	144	1.0	120	1.1	-16.8	155	1.4	29.2
Total	**14,150**	**100.0**	**11,205**	**100.0**	**-20.8**	**11,381**	**100.0**	**1.6**

Source: EMSI, Table 2014.2 – QCEW Employees
*EMSI Projections

Figure 3.8. Top 10 Industries in Falls Church City by Number of Jobs: 2012

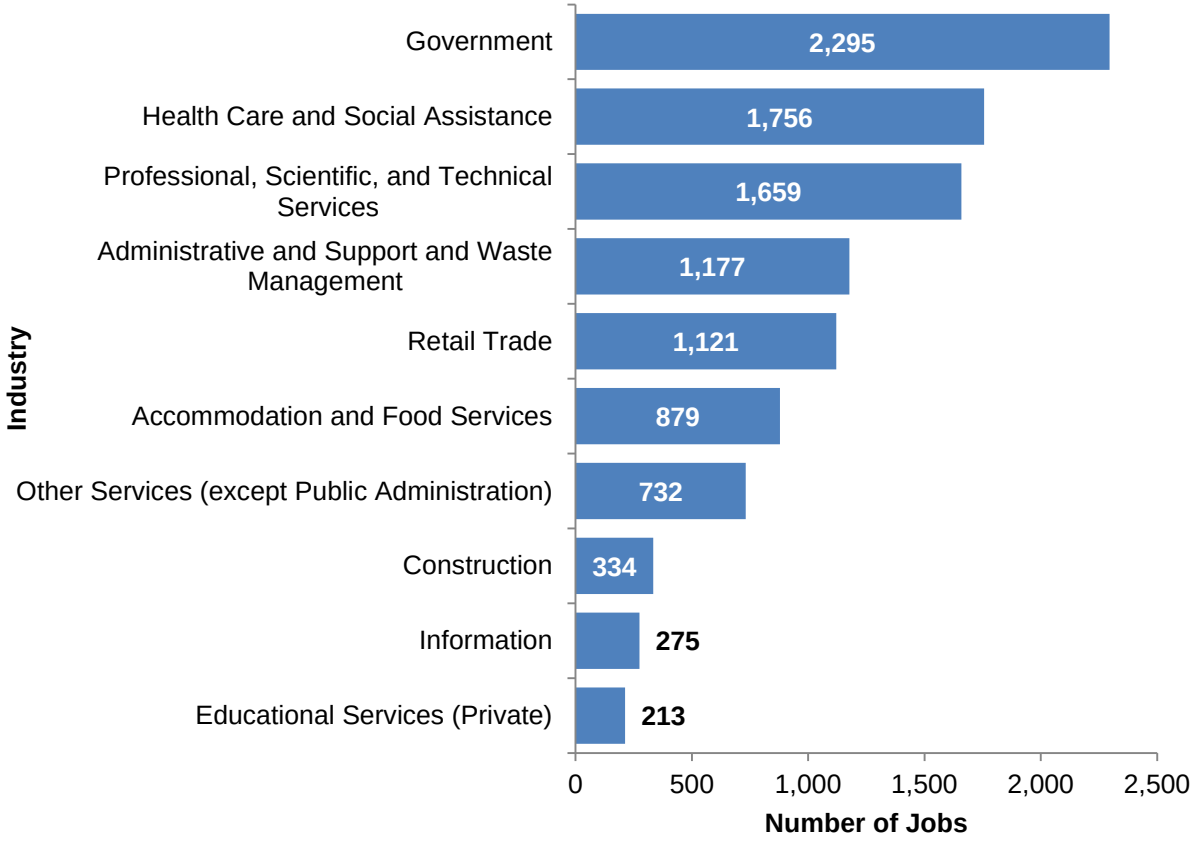


Table 3.19 (next page) and Figure 3.9 (following page) display employment data by occupation for Fairfax County in 2001 and 2012. Projections are provided for the year 2021. Occupations held by the highest percentage of Fairfax County employees in 2001 were office and administrative support jobs (15 percent), followed by workers in computer and mathematical jobs (13 percent). In 2012, the percentage of employees with computer and mathematical jobs increased to 14 percent of Fairfax County workers, which shared the top position for percentage of employees by occupation for that year with office and administrative support jobs (14 percent). Projections for 2021 show that the highest percentage of Fairfax County employees will be employed in computer and mathematical jobs (14 percent), followed by office and administration (13 percent).

Table 3.19. Employment by Occupation in Fairfax County: 2001, 2012, and 2021

Occupation	2001		2012		% Change from 2001 to 2012	2021*		% Change from 2012 to 2021*
	#	%	#	%		#	%	
Architecture and Engineering	14,706	2.7	16,275	2.8	10.7	17,376	2.6	6.8
Arts, Design, Entertainment, Sports, and Media	10,225	1.9	12,086	2.0	18.2	13,111	2.0	8.5
Building and Grounds Cleaning and Maintenance	18,831	3.5	19,899	3.4	5.7	21,884	3.3	10.0
Business and Financial Operations	49,214	9.1	63,389	10.7	28.8	71,265	10.8	12.4
Community and Social Service	4,449	0.8	4,986	0.8	12.1	5,756	0.9	15.4
Computer and Mathematical	69,455	12.8	83,291	14.1	19.9	94,987	14.4	14.0
Construction and Extraction	22,718	4.2	18,606	3.2	-18.1	22,377	3.4	20.3
Education, Training, and Library	25,218	4.6	31,925	5.4	26.6	37,931	5.8	18.8
Farming, Fishing, and Forestry	354	0.1	285	<0.1	-19.5	273	<0.1	-4.2
Food Preparation and Serving Related	32,195	5.9	38,027	6.4	18.1	42,887	6.5	12.8
Healthcare Practitioners and Technical	17,050	3.1	21,970	3.7	28.9	26,144	4.0	19.0
Healthcare Support	7,810	1.4	9,958	1.7	27.5	12,619	1.9	26.7
Installation, Maintenance, and Repair	20,565	3.8	15,762	2.7	-23.4	16,862	2.6	7.0
Legal	6,114	1.1	7,754	1.3	26.8	8,163	1.2	5.3
Life, Physical, and Social Science	3,952	0.7	5,342	0.9	35.2	6,076	0.9	13.7
Management	37,585	6.9	42,472	7.2	13.0	46,708	7.1	10.0
Office and Administrative Support	81,620	15.0	79,882	13.5	-2.1	87,242	13.2	9.2
Personal Care and Service	14,112	2.6	17,114	2.9	21.3	19,727	3.0	15.3
Production	12,845	2.4	10,526	1.8	-18.1	10,145	1.5	-3.6
Protective Service	12,931	2.4	17,024	2.9	31.7	19,139	2.9	12.4
Sales and Related	60,490	11.1	54,613	9.3	-9.7	56,903	8.6	4.2
Transportation and Material Moving	20,533	3.8	19,221	3.3	-6.4	21,279	3.2	10.7
Total	**542,972**	**100.0**	**590,408**	**100.0**	**8.7**	**658,852**	**100.0**	**11.6**

Source: EMSI, Table 2014.2 – QCEW Employees
*EMSI Projections

Figure 3.9. Top 10 Occupations in Fairfax County by Number of Jobs: 2012

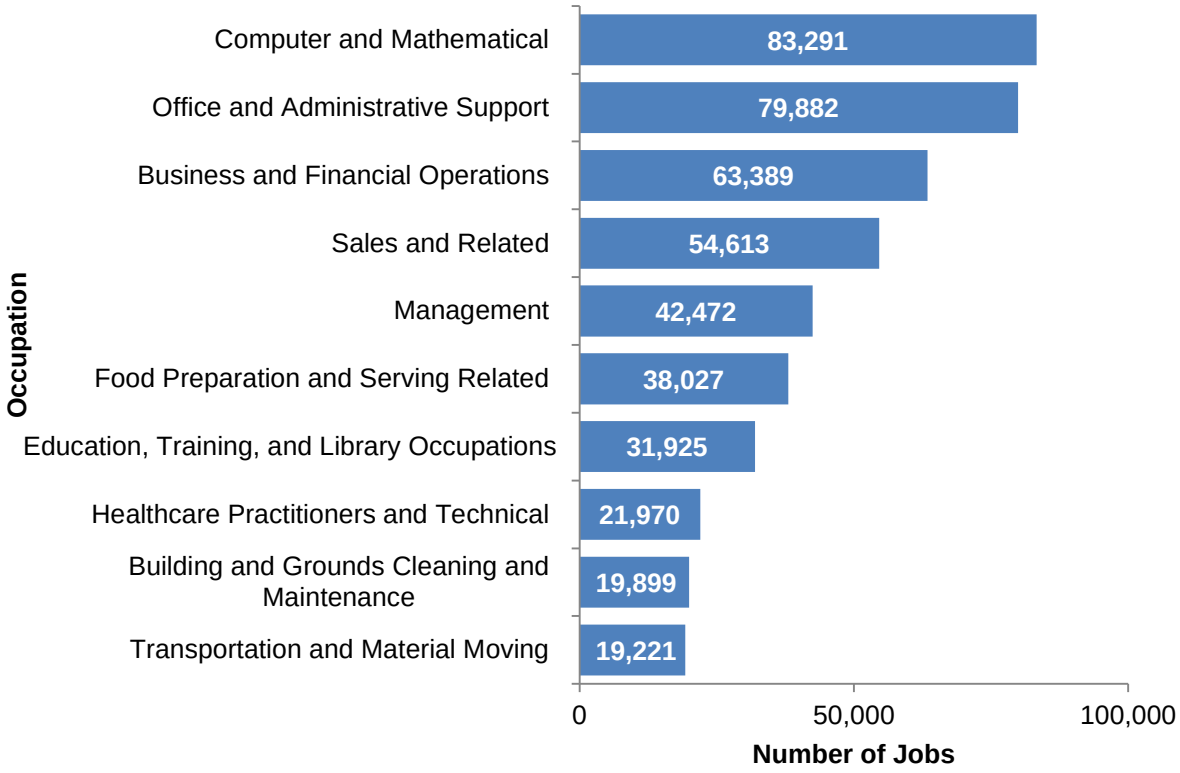


Table 3.20 (next page) and Figure 3.10 (following page) display employment data by occupation for Fairfax City in 2001 and 2012. Projections are provided for the year 2021. Occupations held by the highest percentage of Fairfax City employees in 2001 were office and administrative support jobs (18 percent), followed by employees in sales and related jobs (15 percent). These two occupations continued to be the largest in 2012, with 14 percent of employees working in office and administrative support occupations and 12 percent of employees working in sales and related jobs. These two occupations are projected to remain in the top two positions in 2021, with a projected 13 percent of Fairfax City employees in office and administrative support jobs and a projected 12 percent of employees in sales and related jobs.

Table 3.20. Employment by Occupation in Fairfax City: 2001, 2012, and 2021

Occupation	2001		2012		% Change from 2001 to 2012	2021*		% Change from 2012 to 2021*
	#	%	#	%		#	%	
Architecture and Engineering	414	2.4	576	2.9	39.1	605	2.7	5.0
Arts, Design, Entertainment, Sports, and Media	269	1.6	264	1.3	-1.9	269	1.2	1.9
Building and Grounds Cleaning and Maintenance	439	2.6	688	3.5	56.7	857	3.9	24.6
Business and Financial Operations	1,109	6.5	1,382	7.0	24.6	1,293	5.9	-6.4
Community and Social Service	216	1.3	292	1.5	35.2	313	1.4	7.2
Computer and Mathematical	1,181	6.9	1,755	8.9	48.6	1,654	7.5	-5.8
Construction and Extraction	707	4.1	493	2.5	-30.3	588	2.7	19.3
Education, Training, and Library	139	0.8	352	1.8	153.2	506	2.3	43.8
Farming, Fishing, and Forestry	<10	<0.1	<10	<0.1	–	<10	<0.1	–
Food Preparation and Serving Related	1,529	8.9	1,900	9.6	24.3	2,337	10.6	23.0
Healthcare Practitioners and Technical	540	3.1	892	4.5	65.2	1,132	5.1	26.9
Healthcare Support	407	2.4	709	3.6	74.2	954	4.3	34.6
Installation, Maintenance, and Repair	1,030	6.0	776	3.9	-24.7	855	3.9	10.2
Legal	566	3.3	773	3.9	36.6	751	3.4	-2.8
Life, Physical, and Social Science	101	0.6	126	0.6	24.8	109	0.5	-13.5
Management	993	5.8	1,158	5.9	16.6	1,182	5.4	2.1
Office and Administrative Support	3,041	17.7	2,783	14.1	-8.5	2,832	12.9	1.8
Personal Care and Service	432	2.5	813	4.1	88.2	1,237	5.6	52.2
Production	285	1.7	295	1.5	3.5	304	1.4	3.1
Protective Service	428	2.5	638	3.2	49.1	883	4.0	38.4
Sales and Related	2,570	15.0	2,306	11.7	-10.3	2,588	11.7	12.2
Transportation and Material Moving	786	4.6	742	3.8	-5.6	774	3.5	4.3
Total	**17,188**	**100.0**	**19,720**	**100.0**	**14.7**	**22,032**	**100.0**	**11.7**

Source: EMSI, Table 2014.2 – QCEW Employees
*EMSI Projections

Figure 3.10. Top 10 Occupations in Fairfax City by Number of Jobs: 2012

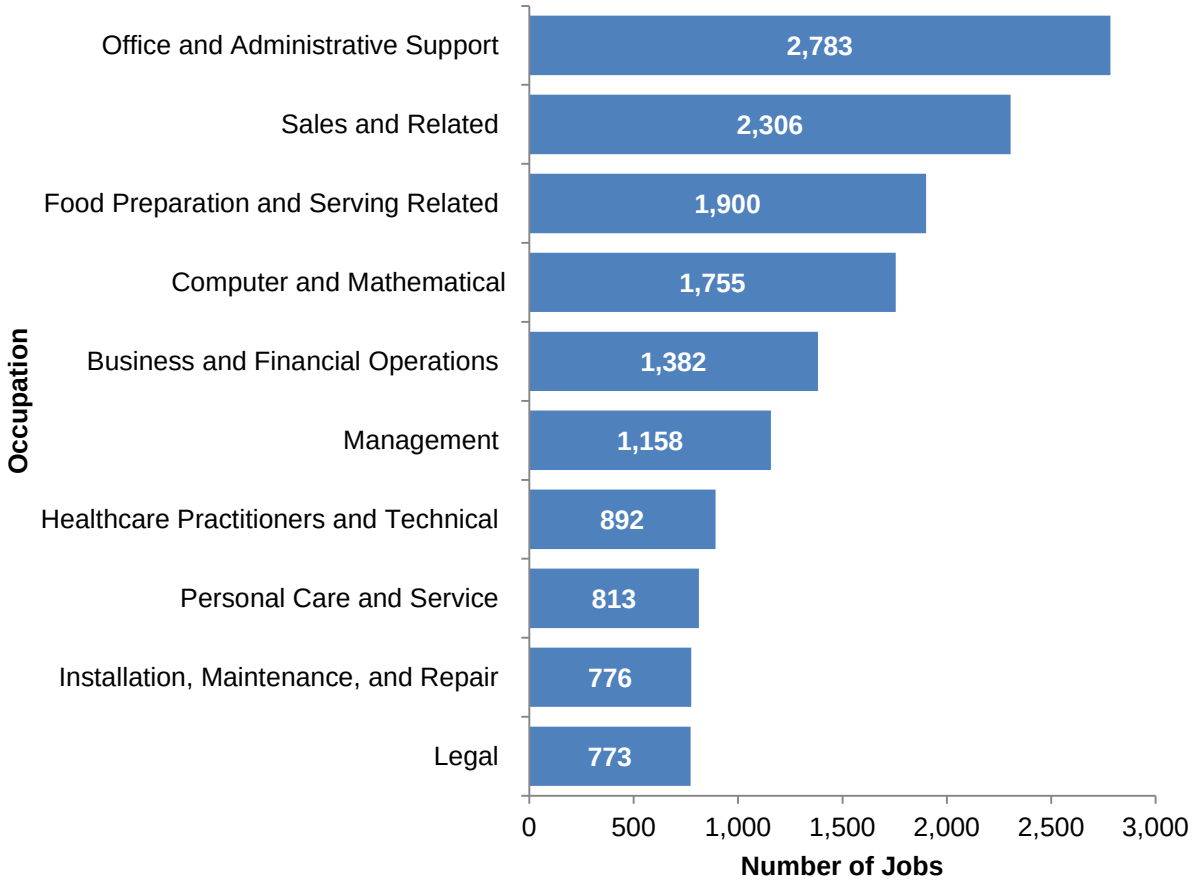


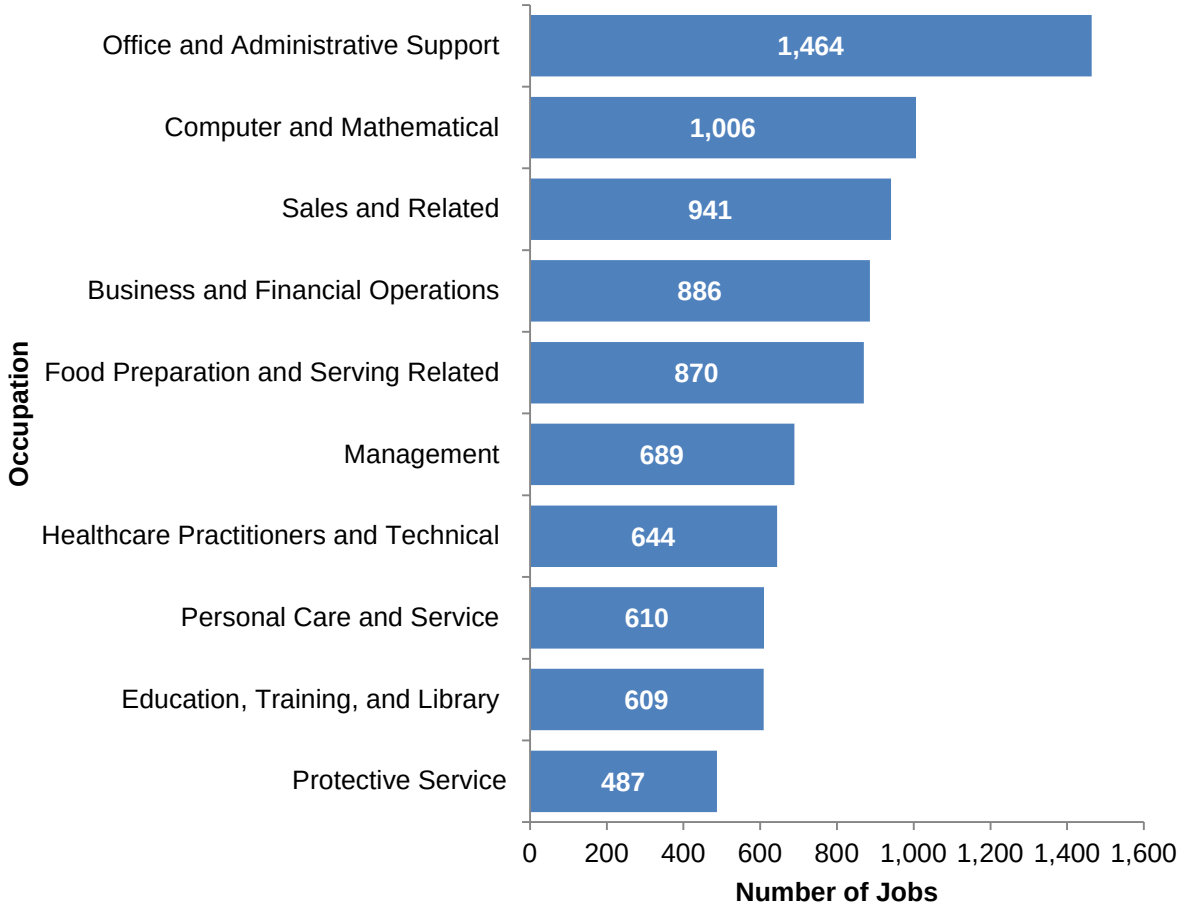
Table 3.21 (next page) and Figure 3.11 (following page) display employment data by occupation for Falls Church City in 2001 and 2012. Projections are provided for the year 2021. Occupations held by the highest percentage of Falls Church City employees in 2001 were office and administrative support jobs (14 percent), followed by workers in business and financial operations (10 percent). Again, in 2012, the highest percentage of Falls Church City employees were those with office and administrative support jobs (13 percent), however, the second highest percentage of employees held computer and mathematical jobs (9 percent). Projections for 2021 show that office and administrative support jobs will continue to employ the highest percentage of Falls Church City employees (13 percent), followed by sales and related jobs and computer and mathematical jobs (each 9 percent).

Table 3.21. Employment by Occupation in Falls Church City: 2001, 2012, and 2021

Occupation	2001		2012		% Change from 2001 to 2012	2021*		% Change from 2012 to 2021*
	#	%	#	%		#	%	
Architecture and Engineering	332	2.3	240	2.1	-38.3	268	2.4	11.7
Arts, Design, Entertainment, Sports, and Media	274	1.9	246	2.2	-11.4	272	2.4	10.6
Building and Grounds Cleaning and Maintenance	532	3.8	376	3.4	-41.5	269	2.4	-28.5
Business and Financial Operations	1,436	10.1	886	7.9	-62.1	930	8.2	5.0
Community and Social Service	247	1.7	200	1.8	-23.5	170	1.5	-15.0
Computer and Mathematical	907	6.4	1,006	9.0	9.8	983	8.6	-2.3
Construction and Extraction	559	4.0	253	2.3	-120.9	216	1.9	-14.6
Education, Training, and Library	705	5.0	609	5.4	-15.8	683	6.0	12.2
Farming, Fishing, and Forestry	<10	<0.1	<10	<0.1	–	<10	<0.1	–
Food Preparation and Serving Related	917	6.5	870	7.8	-5.4	861	7.6	-1.0
Healthcare Practitioners and Technical	835	5.9	644	5.8	-29.7	627	5.5	-2.6
Healthcare Support	328	2.3	306	2.7	-7.2	391	3.4	27.8
Installation, Maintenance, and Repair	551	3.9	390	3.5	-41.3	421	3.7	7.9
Legal	374	2.6	219	2.0	-70.8	238	2.1	8.7
Life, Physical, and Social Science	235	1.7	110	1.0	-113.6	123	1.1	11.8
Management	966	6.8	689	6.1	-40.2	710	6.2	3.0
Office and Administrative Support	2,013	14.2	1,464	13.1	-37.5	1,445	12.7	-1.3
Personal Care and Service	456	3.2	610	5.4	25.2	661	5.8	8.4
Production	315	2.2	199	1.8	-58.3	175	1.5	-12.1
Protective Service	337	2.4	487	4.3	30.8	408	3.6	-16.2
Sales and Related	1,299	9.2	941	8.4	-38.0	1,035	9.1	10.0
Transportation and Material Moving	527	3.7	456	4.1	-15.6	492	4.3	7.9
Total	**14,150**	**100.0**	**11,205**	**100.0**	**-26.3**	**11,381**	**100.0**	**1.6**

Source: EMSI, Table 2014.2 – QCEW Employees
*EMSI Projections

Figure 3.11. Top 10 Occupations in Falls Church City by Number of Jobs: 2012



IV. Employer Profile

Table 3.22 (next page) provides information on the largest employers in Fairfax County in 2014. The four entities employing the largest number of persons (5,000 employees or more) in the county were Booz Allen Hamilton, George Mason University, INOVA Health System, and Science Applications International Corp. Each of these employers is in a different type of business: management and technology consulting, higher education, healthcare, and information technology. The highest proportion of top employers was in the information technology industry.

Table 3.22. Top Employers in Fairfax County: 2014

Employers	Estimated Number of Employees	Type of Business
Booz Allen Hamilton	5,000-9,999	Management and technology consulting
George Mason University	5,000-9,999	Higher education
INOVA Health System	5,000-9,999	Health care
Science Applications International Corp.	5,000-9,999	Information technology
Gannett Co.	2,500-4,999	Newspaper publisher
American Management Systems	2,500-4,999	Information technology
Computer Sciences Corporation	2,500-4,999	Information technology
Federal Home Loan Mortgage Corp.	2,500-4,999	Financial services
Lockheed Martin Corp.	2,500-4,999	Information technology
Electronic Data Systems (EDS)	1,500-2,499	Information technology
ExxonMobil Corporation	1,500-2,499	Petroleum products
TRW	1,500-2,499	Information technology
AT&T Corporation	1,000-1,499	Telecommunications
Kaiser Permanente	1,000-1,499	HMO

Source: Virginia Economic Development Partnership (VEDP) Community Profiles – Fairfax County

Table 3.23 provides information on the largest employers in Fairfax City in 2014. The entity employing the largest number of employees in Fairfax City was Fairfax Nursing Center, Inc. employing from 300 to 599 persons.

Table 3.23. Top Employers in Fairfax City: 2014

Employers	Estimated Number of Employees	Type of Business
Fairfax Nursing Center, Inc.	300-599	Health care
Burton and Robinson, Inc.	100-299	Heavy equipment and contracting
Dominion Virginia Power	100-299	Electric utility
Christopher Consultants, Ltd.	50-99	Engineering services
Verizon Virginia, Inc.	50-99	Telecommunications

Source: Virginia Economic Development Partnership (VEDP) Community Profiles – City of Fairfax

Table 3.24 (next page) provides information on the largest employers in Falls Church City in 2014. Two federal government agencies, the Department of Health and Human Services and the Social Security Administration, employed the largest number of persons; each employing 1,000 to 1,499 employees.

Table 3.24. Top Employers in Falls Church City: 2014

Employers	Estimated Number of Employees	Type of Business
Department of Health and Human Services	1,000-1,499	Federal Government
Social Security Administration	1,000-1,499	Federal Government
Kaiser Permanente	300-599	Health care
General Dynamics Corp.	100-299	Headquarters – defense systems

Source: Virginia Economic Development Partnership (VEDP) Community Profiles – City of Falls Church

V. Federal Government Procurement

Table 3.25 and Figures 3.12, 3.13, and 3.14 present data on federal government procurement from firms located in Fairfax County, Fairfax City, and Fall Church City for fiscal years 2005 through 2010. Federal procurement in Fairfax County increased 84 percent from $13.2 billion in 2005 to $24.3 billion in 2010. In contrast, Fairfax City and Falls Church City each experienced a decrease. Federal procurement in Fairfax City decreased 91 percent from $2.5 billion in 2005 to $229 million in 2010. Falls Church City decreased 57 percent from $1.4 billion in 2005 to $592 million in 2010.

Table 3.25. Federal Government Procurement in Fairfax City, Falls Church City and Fairfax County: Fiscal Years 2005 through 2010 (in U.S. Dollars)

Jurisdiction	Year						% Change from 2005 to 2010
	2005	2006	2007	2008	2009	2010	
Fairfax County	13,211,746,000	14,033,688,000	13,667,969,000	16,979,596,000	39,841,028,000	24,271,998,000	83.7
Fairfax City	2,506,814,000	2,293,975,000	1,765,529,000	1,914,777,000	3,961,194,000	228,841,000	-90.9
Falls Church City	1,375,935,000	1,261,247,000	1,339,510,000	1,652,951,000	2,193,996,000	592,360,000	-56.9

Sources: U.S. Census Bureau, Consolidated Federal Funds Report (CFFR) 2005 to 2010
Federal Financial Statistics program was terminated in 2012; therefore, the CFFR 2010 is the most recent available report
Amounts are not adjusted for inflation

Figure 3.12. Federal Government Procurement in Fairfax County: Fiscal Years 2005 through 2010 (in Billions of U.S. Dollars)

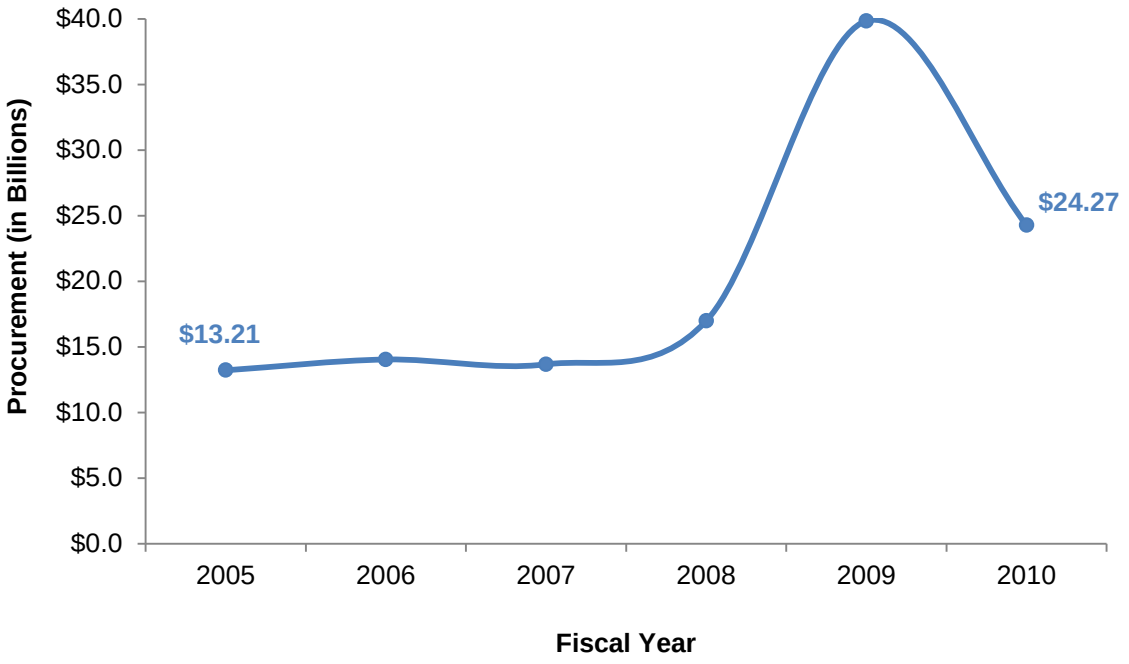


Figure 3.13. Federal Government Procurement in Fairfax City: Fiscal Years 2005 through 2010 (in Billions of U.S. Dollars)

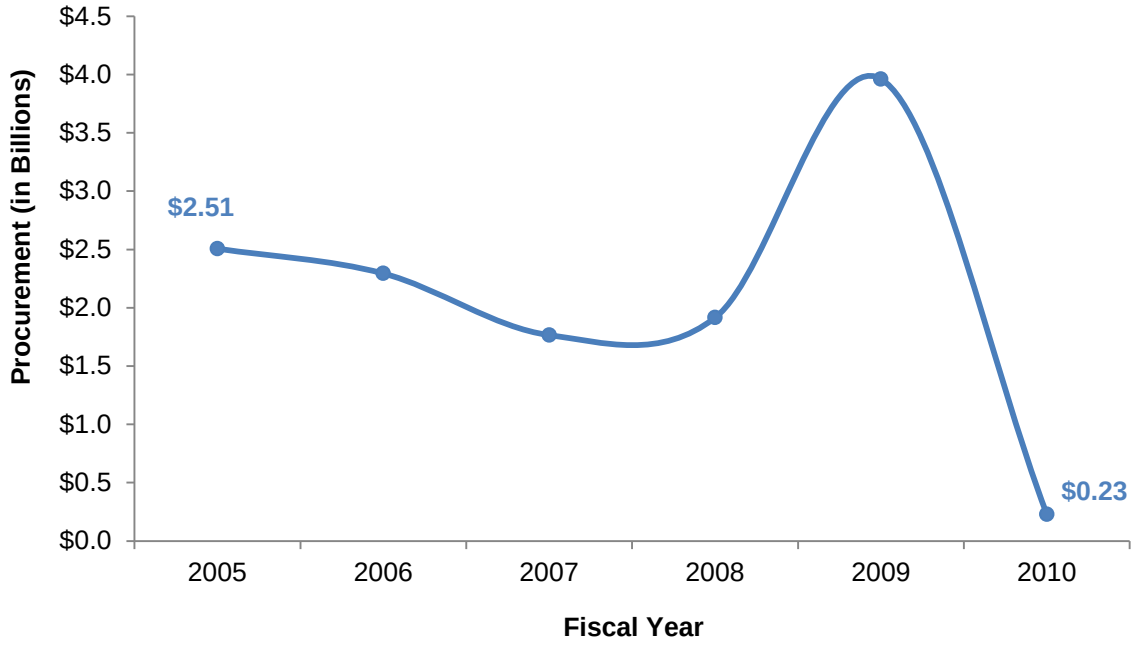
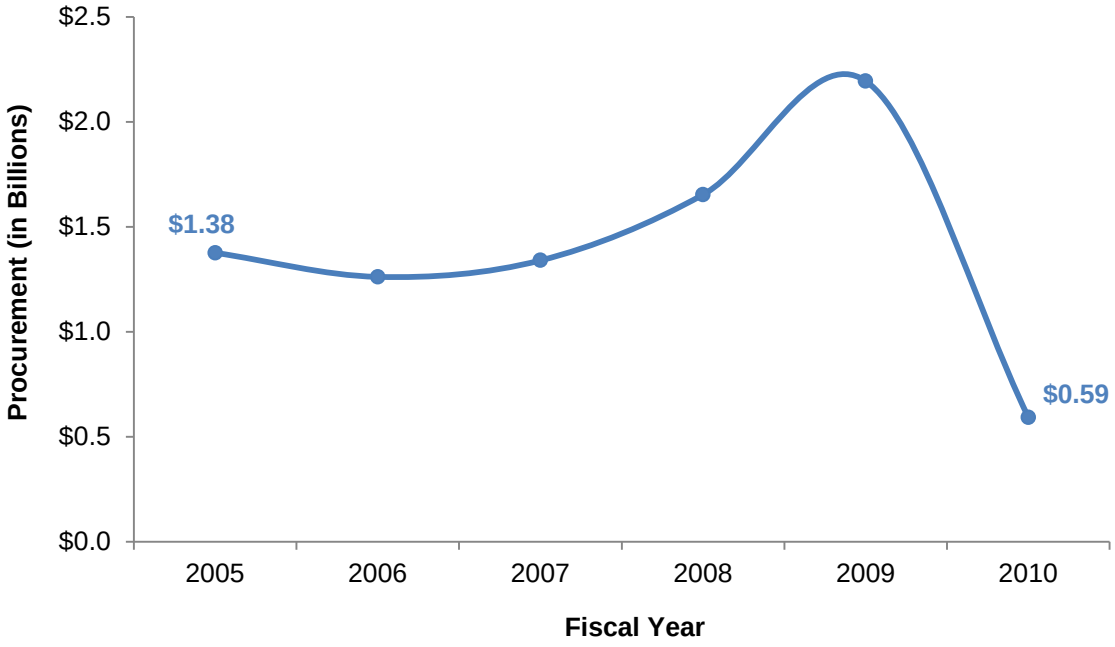


Figure 3.14. Federal Government Procurement in Falls Church City: Fiscal Years 2005 through 2010 (in Billions of U.S. Dollars)



VI. Income

Table 3.26 and Figure 3.15 (next page) display annual per capita income data in 1999 and 2012 for residents of Fairfax County, Fairfax City, and Falls Church City. Figures for 1999 have been converted to 2012 constant U.S. dollars to adjust for inflation. For each jurisdiction, annual per capita income increased from 1999 to 2012. Fairfax City and Falls Church City residents each experienced a 7 percent increase in per capita personal income during this time period while Fairfax County residents experienced a 2 percent increase in per capita income. Among the three jurisdictions, Falls Church City residents had the highest per capita personal income in both time periods ($53,922 in 1999 and $57,784 in 2012).

Table 3.26. Annual Per Capita Personal Income for Fairfax County Fairfax City, and Falls Church City Residents: 1999 and 2012

Jurisdiction	Per Capita Income ($)		% Change from 1999 to 2012
	1999*	2012	
Fairfax County	48,454	49,572	2.3
Fairfax City	41,044	43,910	7.0
Falls Church City	53,922	57,784	7.2

Sources: U.S. Census Bureau, Census 2000, Table DP-3;
U.S. Census Bureau, 2012 American Community Survey, Table DP03
*U.S. Dollars for 1999 were converted to 2012 constant U.S. Dollars using the BEA Implicit Price Deflator

Table 3.27 and Figure 3.15 display median annual household income for Fairfax County, Fairfax City, and Falls Church City residents in 1999 and 2012. Figures for 1999 have been converted to 2012 constant U.S. dollars to adjust for inflation. As with per capita income shown in Table 3.26, median annual household income increased from 1999 to 2012 in these jurisdictions. Residents of Falls Church City had the highest increase in median household income (25 percent) from 1999 to 2012. In 2012, Falls Church City residents had the highest median household income ($122,844) among the three jurisdictions, followed by residents of Fairfax County ($107,096), and residents of Fairfax City ($94,496).

Table 3.27. Median Annual Household Income for Fairfax County, Fairfax City, and Falls Church City Residents: 1999 and 2012

Jurisdiction	Median Household Income ($)		% Change from 1999 to 2012
	1999*	2012	
Fairfax County	106,463	107,096	0.6
Fairfax City	88,851	94,496	6.4
Falls Church City	98,416	122,844	24.8

Sources: U.S. Census Bureau, Census 2000, Table DP-3;
U.S. Census Bureau, 2012 American Community Survey, Table DP03
*U.S. Dollars for 1999 were converted to 2012 constant U.S. Dollars using the BEA Implicit Price Deflator

Figure 3.15. Annual Per Capita Income and Median Household Income for Fairfax County, Fairfax City and Falls Church City Residents: Percent Change from 1999 to 2012

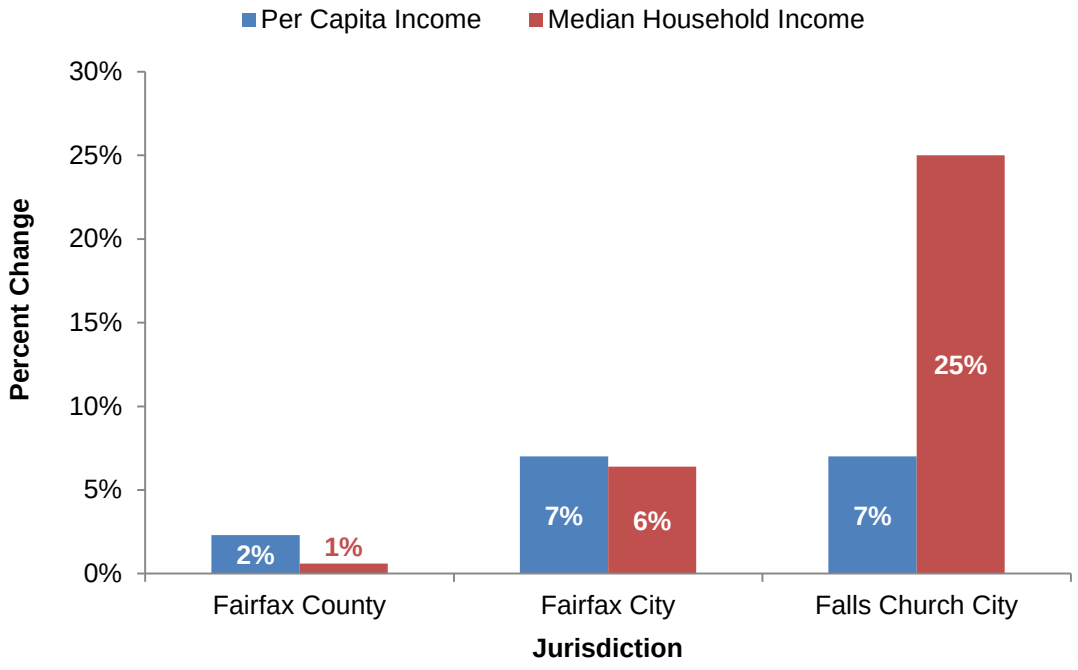


Table 3.28 and Figure 3.16 present the distribution of annual household income levels for Fairfax County residents in 2012. In 2012, a majority (54 percent) of Fairfax County households had annual income levels of $100,000 or higher. About 21 percent of households earned from $100,000 to $149,999, 14 percent of households earned from $150,000 to $199,999, and 19 percent earned greater than $200,000. As shown in Figure 3.16, 7 percent of Fairfax County households had incomes less than $25,000.

Table 3.28. Annual Household Income Distribution for Fairfax County Residents: 2012

Household Income and Benefits	Fairfax County Residents	
	#	%
Less than $10,000	9,029	2.3%
$10,000 to $14,999	4,236	1.1%
$15,000 to $24,999	14,799	3.8%
$25,000 to $34,999	17,637	4.5%
$35,000 to $49,999	26,832	6.9%
$50,000 to $74,999	55,508	14.2%
$75,000 to $99,999	52,081	13.3%
$100,000 to $149,999	83,511	21.3%
$150,000 to $199,999	53,334	13.6%
Greater than $200,000	74,249	19.0%
Total Households	**391,216**	**100.0%**

Source: U.S. Census Bureau, 2012 American Community Survey, Table DP03

Figure 3.16. Annual Household Income Distribution for Fairfax County Residents: 2012

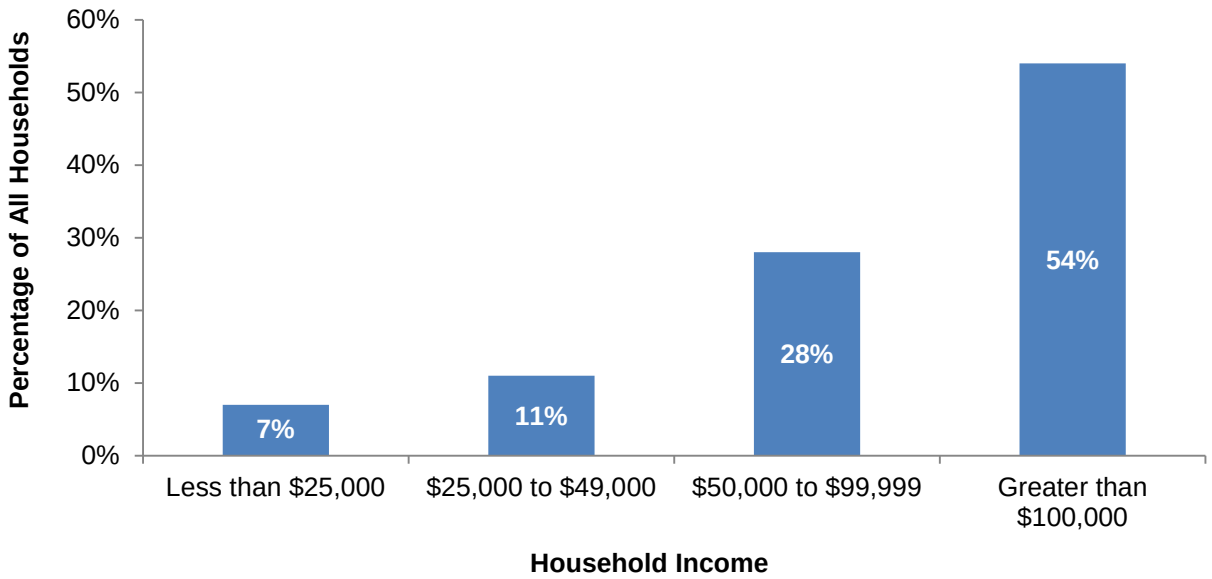


Table 3.29 and Figure 3.17 display the 2012 household income levels for residents of Fairfax City. The largest proportion of Fairfax City households had an income level of $100,000 to $149,999 (19 percent). Overall, approximately 50 percent of Fairfax City households had an income level greater than $100,000. About 11 percent of Fairfax City households had an income level less than $25,000.

Table 3.29. Annual Household Income Distribution for Fairfax City Residents: 2012

Household Income and Benefits	Fairfax City Residents	
	#	%
Less than $10,000	170	2.0%
$10,000 to $14,999	165	2.0%
$15,000 to $24,999	608	7.3%
$25,000 to $34,999	324	3.9%
$35,000 to $49,999	717	8.6%
$50,000 to $74,999	1,540	18.4%
$75,000 to $99,999	740	8.9%
$100,000 to $149,999	1,574	18.8%
$150,000 to $199,999	1,160	13.9%
Greater than $200,000	1,360	16.3%
Total Households	**8,358**	**100.0%**

Source: U.S. Census Bureau, 2012 American Community Survey Table DP03

Figure 3.17. Annual Household Income Distribution for Fairfax City Residents: 2012

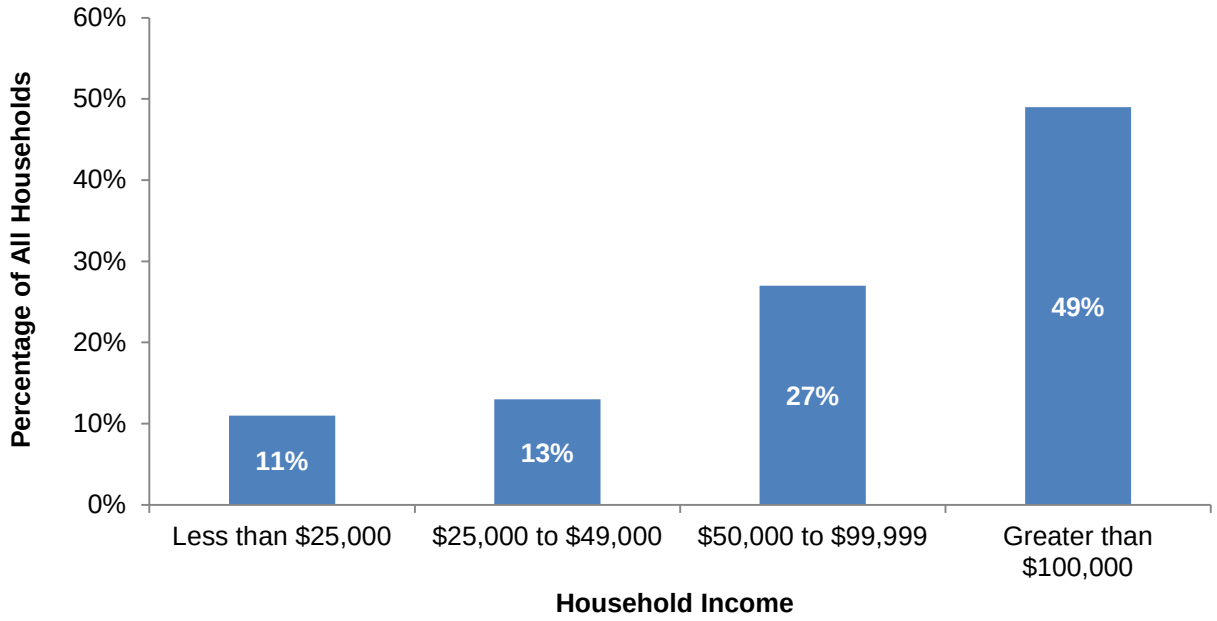


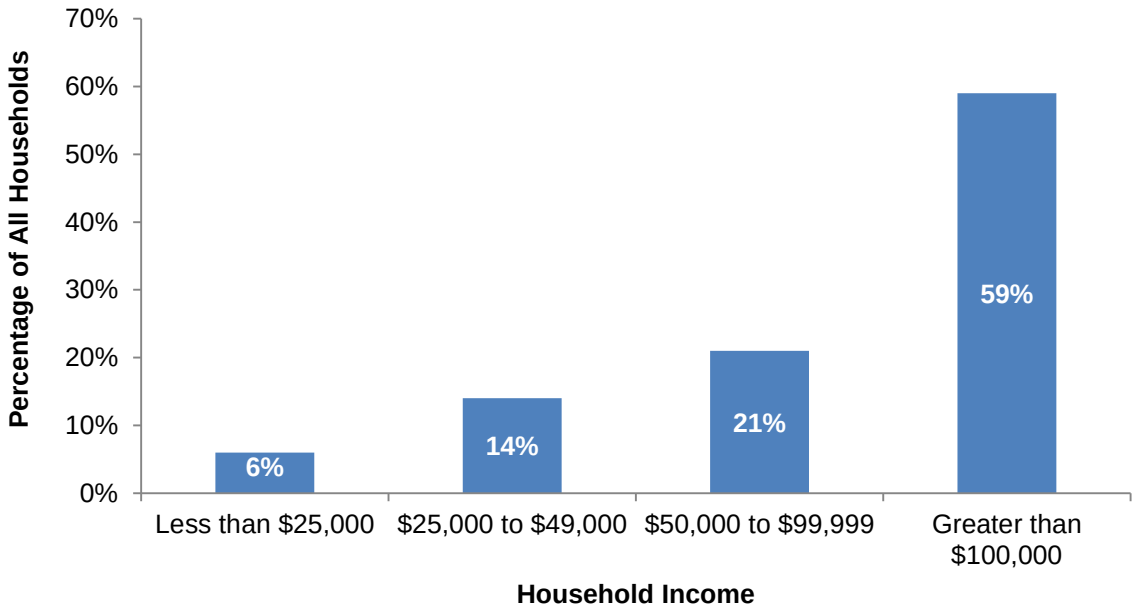
Table 3.30 and Figure 3.18 display the 2012 household income levels for residents of Falls Church City. In 2012, the greatest proportion of Falls Church City households had an income level over $200,000 (23 percent). Overall, the majority (59 percent) of Falls Church City residents had an annual income level greater than $100,000. Only about 6 percent of households in Falls Church City had an income level less than $25,000.

Table 3.30. Annual Household Income Distribution for Falls Church City Residents: 2012

Household Income and Benefits	Falls Church City Residents	
	#	%
Less than $10,000	96	2.0
$10,000 to $14,999	68	1.4
$15,000 to $24,999	119	2.5
$25,000 to $34,999	245	5.0
$35,000 to $49,999	431	8.9
$50,000 to $74,999	556	11.4
$75,000 to $99,999	485	10.0
$100,000 to $149,999	1,040	21.4
$150,000 to $199,999	688	14.2
Greater than $200,000	1,129	23.2
Total Households	**4,857**	**100.0**

Source: U.S. Census Bureau, 2012 American Community Survey, Table DP03

Figure 3.18. Annual Household Income Distribution for Falls Church City Residents: 2012



VII. Real Estate

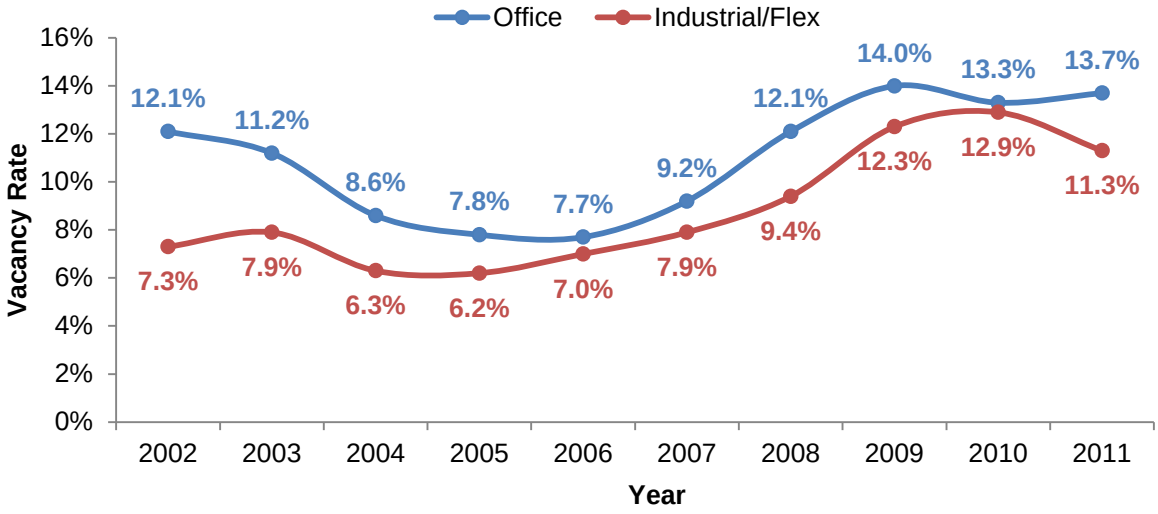
Table 3.31 and Figure 3.19 present the inventory amounts and vacancy rates of office and industrial/flex space in Fairfax County from 2002 through 2011. The standing inventory for both office space and industrial/flex space steadily increased from 2002 through 2011. In 2011, Fairfax County had 113.6 million square feet of office space and 38.9 million square feet of industrial/flex space. Vacancy rates for office space decreased steadily from 12 percent in 2002 to a low of 8 percent in 2006, and then increased to 14 percent in 2011. The highest office space vacancy rates occurred in 2009 and 2011 (each 14 percent). Vacancy rates for industrial/flex space followed a generally similar pattern with rates decreasing from 7 percent in 2002 to 6 percent in 2005, and then rising to 11 percent in 2011. The highest industrial/flex space vacancy rates occurred in 2010 (13 percent).

Table 3.31. Office and Industrial/Flex Trends in Fairfax County: 2002 through 2011

Year	Office		Industrial/Flex	
	Standing Inventory	Vacancy Rate (%)	Standing Inventory	Vacancy Rate (%)
2002	100,912,347	12.1	36,478,391	7.3
2003	101,507,385	11.2	36,723,384	7.9
2004	102,117,697	8.6	37,268,392	6.3
2005	103,520,646	7.8	37,698,795	6.2
2006	105,054,801	7.7	38,463,263	7.0
2007	107,232,650	9.2	38,751,743	7.9
2008	111,189,301	12.1	38,866,341	9.4
2009	112,556,702	14.0	38,708,577	12.3
2010	113,191,835	13.3	38,884,683	12.9
2011	113,624,952	13.7	38,949,774	11.3

Source: Fairfax County Economic Development Authority *Midyear 2012 Real Estate Report*

Figure 3.19. Office and Industrial/Flex Vacancy Rate in Fairfax County: 2002 through 2011



The number of units and median prices (in 2013 constant U.S. dollars) of housing units sold in Fairfax County, Fairfax City, and Falls Church City are presented in Table 3.32 and Figures 3.20, 3.21, 3.22, and 3.23. The number of housing units sold in Fairfax County decreased 26 percent from 2000 (19,784) to 2013 (14,636). Although there was 14 percent increase in the number of units sold in Fairfax City and flat growth in Falls Church City during the same time period, it is important to note that the number of units sold in Fairfax County was much greater when compared to Fairfax City and Falls Church City. Within the time period shown, the number of units sold peaked in 2004 for each jurisdiction (25,531 for Fairfax County, 477 for Fairfax City, and 254 for Falls Church City).

All historical median housing prices presented have been converted to 2013 constant U.S. dollars in order to adjust for inflation. From 2000 through 2013, the median price of housing units sold was highest in either 2005 or 2006 for all three jurisdictions. In Fairfax County and Fairfax City, median price steadily decreased from 2005 to 2009, and then rose incrementally from 2009 to 2013. In Falls Church City, median price fluctuated somewhat from 2006 to 2013. The median price of housing units sold in Fairfax County and Fairfax City increased about the same rate (73 percent and 74 percent, respectively) while the median price of housing units sold in Falls Church City increased by about 66 percent from 2000 to 2013.

Table 3.32. Number and Median Price of Housing Units Sold in Fairfax County, Fairfax City, and Falls Church City: 2000 through 2013

Year	Fairfax County		Fairfax City		Falls Church City	
	# of Units Sold	Median Price ($)*	# of Units Sold	Median Price ($)*	# of Units Sold	Median Price ($)*
2000	19,784	$284,131	293	$266,862	184	$384,490
2001	21,104	$313,123	333	$312,174	169	$406,464
2002	22,192	$363,791	344	$372,920	209	$464,308
2003	24,041	$399,846	398	$401,076	181	$590,542
2004	25,531	$478,988	477	$480,186	254	$659,486
2005	23,011	$581,311	424	$572,586	196	$690,352
2006	16,279	$562,718	291	$562,831	145	$728,303
2007	13,566	$546,029	281	$466,858	147	$568,015
2008	13,972	$440,974	271	$414,086	133	$585,582
2009	15,307	$405,585	293	$357,022	169	$680,423
2010	13,892	$442,871	308	$397,002	141	$664,307
2011	12,078	$454,574	273	$426,112	181	$680,828
2012	13,384	$456,705	306	$439,500	204	$621,576
2013	14,636	$490,000	335	$465,000	184	$637,000
% Change from 2000 to 2013	**-26.0%**	**72.5%**	**14.3%**	**74.2%**	**0.0%**	**65.7%**

Source: Real Estate Business Intelligence

*All median prices of housing units have been converted to constant 2013 U.S. Dollars using BEA Implicit Price Deflator; median prices are from June of the specified year

Figure 3.20. Number of Housing Units Sold in Fairfax County: 2000 through 2013

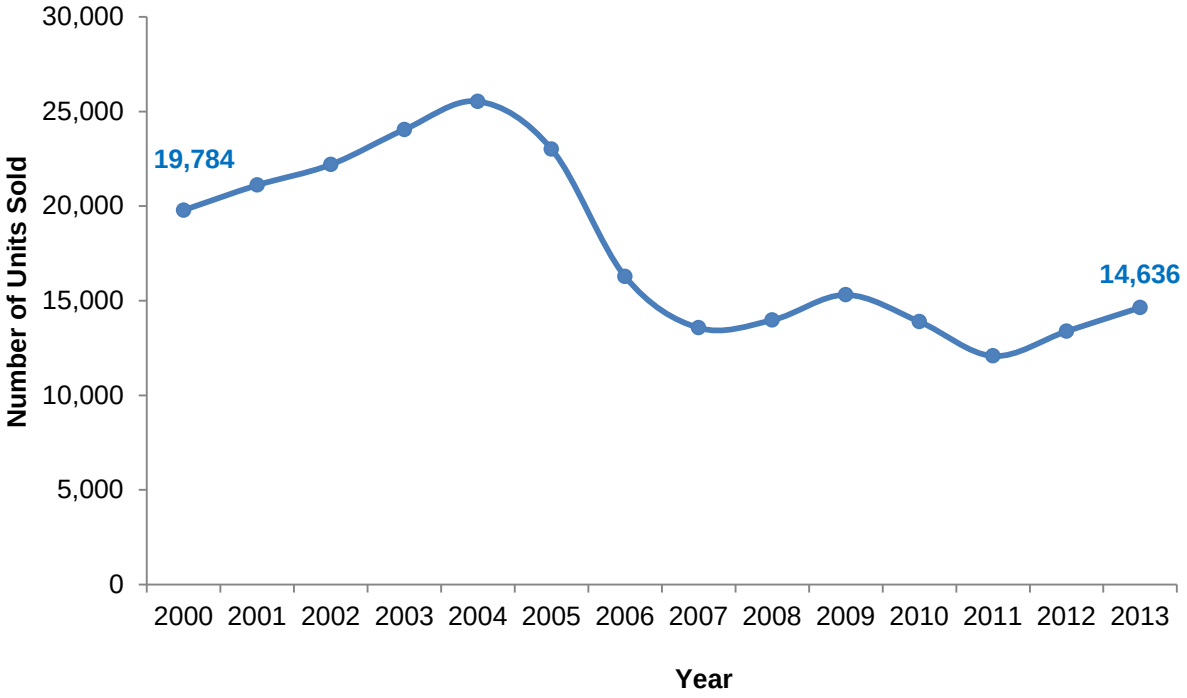


Figure 3.21. Number of Housing Units Sold in Fairfax City: 2000 through 2013

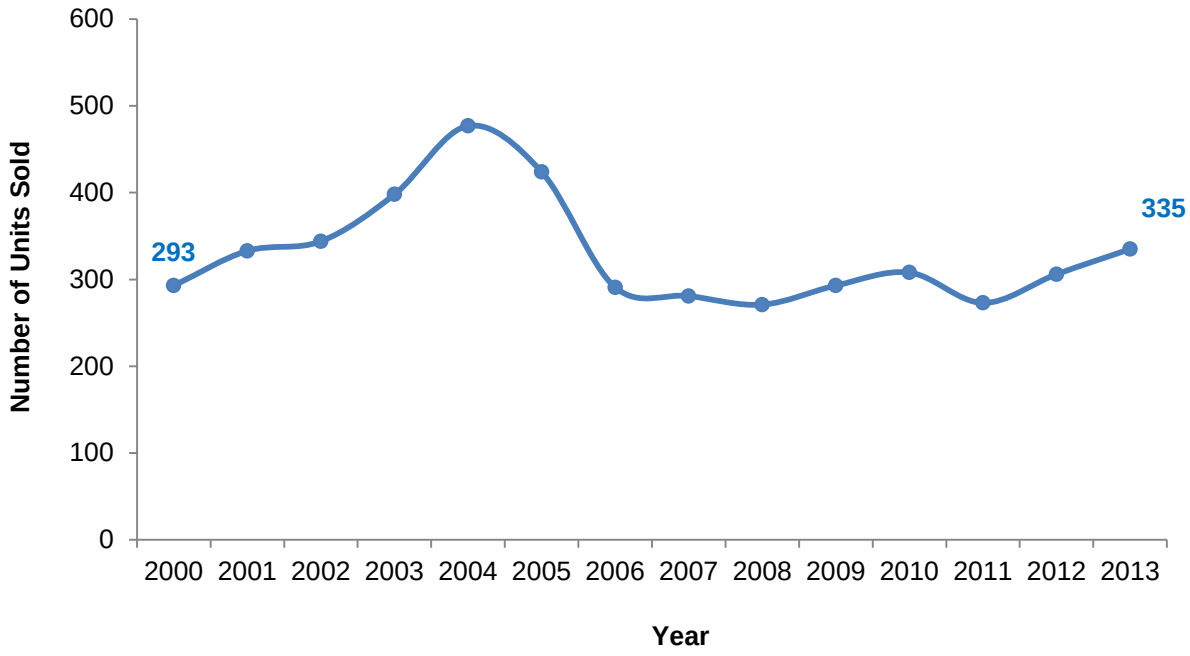


Figure 3.22. Number of Housing Units Sold in Falls Church City: 2000 through 2013

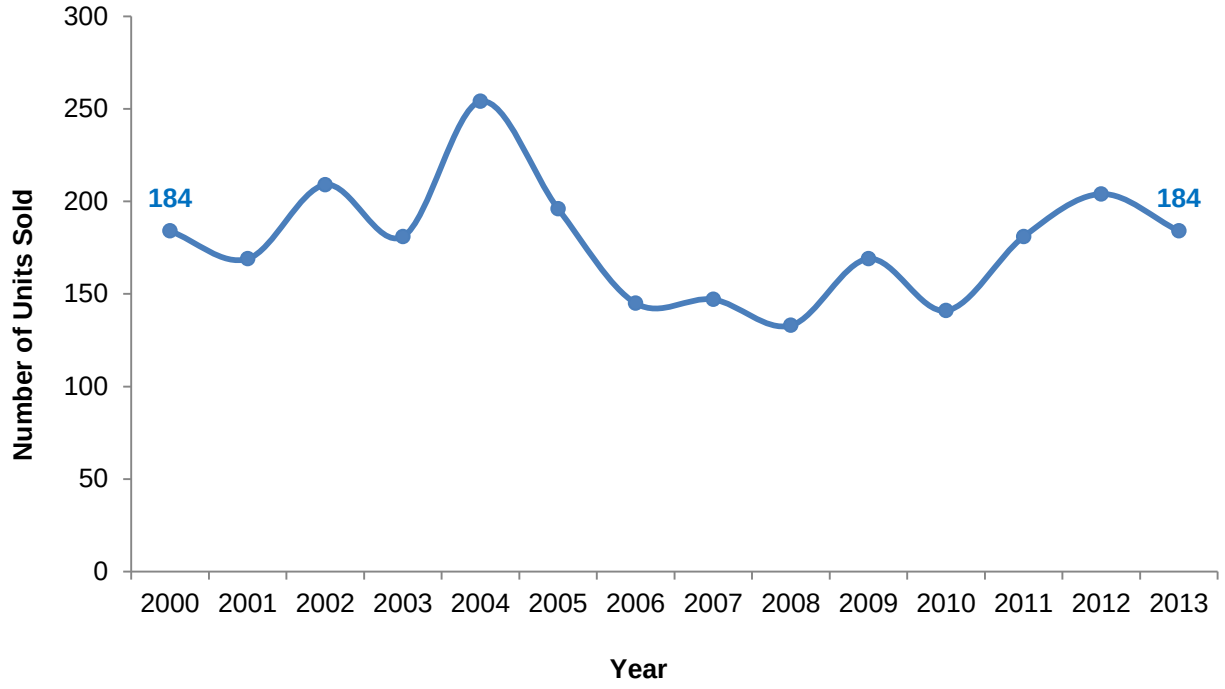
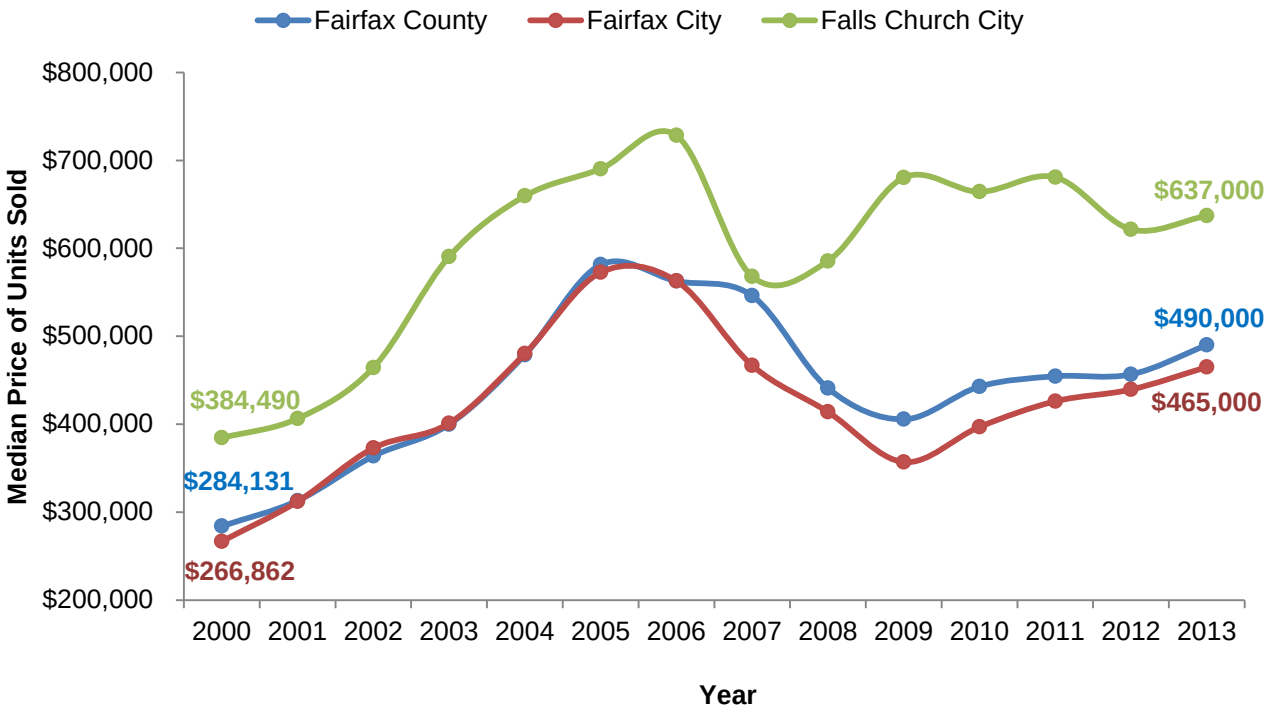
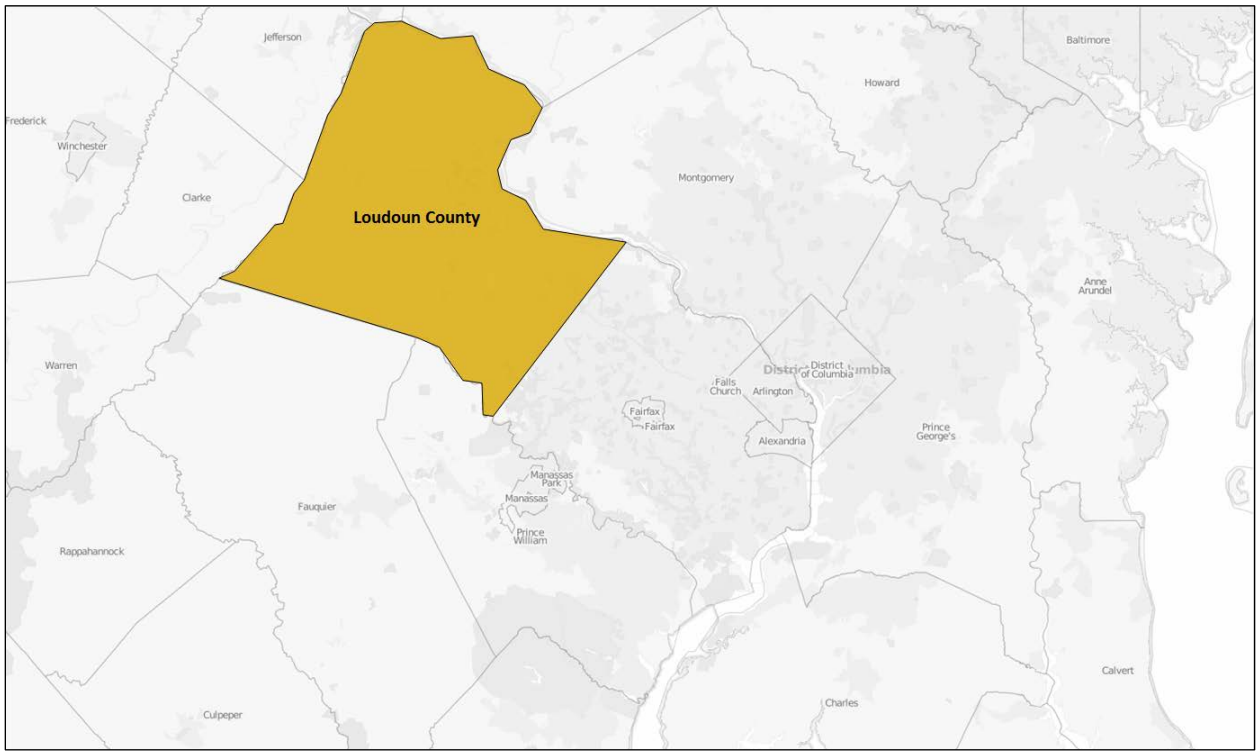


Figure 3.23. Median Price of Housing Units Sold in Fairfax County, Fairfax City, and Falls Church City: 2000 through 2013



Chapter 4. Economic Profile of Loudoun County



Chapter 4. Economic Profile of Loudoun County

Summary

Population Growth and Demographic Shifts

- Loudoun County experienced 78 percent growth between 2001 and 2012, and the population is projected to grow 19 percent between 2012 and 2021. The expected growth bodes well for the College as more people in the service area means more prospective students for the College.
- Population projections for 2021 suggest that growth will continue across all age categories. However, groups normally associated with "traditional college-age" are projected to grow faster than the overall population. The 20 to 24 year old population is projected to experience the highest growth of all age groups between 2012 and 2021 (53 percent growth), and the number of Loudoun County residents age 25 to 29 is projected to increase by 46 percent over the same time period.
- The majority of the Loudoun County population was white in 2001, 2012, and is projected to remain as such in 2021. However, by 2021, the populations of non-white racial/ethnic groups are expected to increase more quickly than the white population, thus shifting the proportions across these groups. The white population is expected to grow at 11 percent between 2012 and 2021, whereas higher growth is expected among all other groups, including the Asian population (34 percent growth), Hispanic population (32 percent growth), and black population (24 percent growth).

Educational Attainment

- Between 2001 and 2012 the proportion of the Loudoun County population with a Bachelor's degree or higher increased from 50 to 58 percent. Projections indicate that the current level of attainment of a Bachelor's degree or higher will remain unchanged by 2021.
- In Loudoun County, the number of residents with an Associate's degree increased by 37 percent between 2001 and 2012 and is expected to increase an additional 17 percent by 2021, but will remain unchanged as a proportion of the total population.

Economic Indicators

- Federal government procurement in Loudoun County fluctuated, but increased overall by 126 percent between 2005 and 2010.
- The labor force participation rate in Loudoun County (77 percent) was higher than the Virginia state (67 percent) and national (64 percent) labor force participation rate in 2012.
- From 2000 to 2013, Loudoun County experienced unemployment rates below the Virginia average. In 2013, the unemployment rate was 4.2 percent in Loudoun County, 5.6 percent in Virginia, and 7.4 percent nationally.
- Between 1999 and 2012, the annual per capita personal income level for Loudoun County residents increased by 3 percent from $44,043 to $45,507 (2012 constant U.S. dollars).

- Between 1999 and 2012, the median annual household income level for Loudoun County residents increased by 11 percent from $105,935 to $117,876 (constant 2012 U.S. dollars). By comparison, the median annual household income level for the United States was $51,371 in 2012.
- In 2012, nearly 60 percent of Loudoun County households reported an annual income of $100,000 and over. The largest proportion of Loudoun County households (23 percent) reported an income of $100,000 to $149,999 in 2012. Less than 5 percent of Loudoun County households reported an income of less than $25,000.
- There was a 12 percentage point increase in the total office and flex/industrial vacancy rate in Loudoun County from 1999 to 2009.
- The number of housing units sold in Loudoun County increased by nearly 87 percent from 2000 to 2004, then sharply decreased by 52 percent between 2004 and 2011.
- Between 2000 and 2013, the median price of housing units sold in Loudoun County increased by nearly 70 percent. The median price of housing units sold increased by 115 percent from $267,123 in 2000 to a high of $574,315 in 2005 (constant 2013 U.S. dollars). From 2005 to 2009, the median price of housing units sold fell by over 35 percent before returning to an increasing trend and reaching $450,000 in 2013.

Employment Trends

- Between 2001 and 2012, the Loudoun County job market experienced a 46 percent increase in total jobs.
- Projections indicate that the total number of jobs in Loudoun County will increase by 33 percent between 2012 and 2021, with a diverse group of industries and occupations contributing to total employment.

I. Population

Table 4.1 presents population data for Loudoun County in 2001, 2012, and the projected figures for 2021. Between 2001 and 2012, the population in Loudoun County experienced a 78 percent growth rate. Projections for 2021 suggest that the population in Loudoun County will grow by 19 percent between 2012 and 2021.

Table 4.1. Loudoun County Population: 2001, 2012, and 2021

Region	2001 Population	2012 Population	Change from 2001 to 2012		2021 Population*	Change from 2012 to 2021*	
			#	%		#	%
Loudoun County	189,905	337,692	147,787	77.8	402,389	64,697	19.2

Source: QCEW Employees - EMSI 2014.1 Class of Worker
*EMSI projections

Table 4.2 below provides the age distribution of the Loudoun County population in 2001, 2012, and projections for 2021. In 2001, two groups, the population age 19 and under, and the population 30 to 44 years old, constituted the largest groups and each accounted for about 32 percent of the 2001 population. In 2012, the proportion of the population age 19 and under was about the same as 2001. Although the 30 to 44 age group experienced a 45 percent growth from 2001 to 2012, it grew at a smaller rate as compared to other age groups and the proportion of 30 to 44 year olds decreased from 32 to 26 percent of the Loudoun County population. Population growth between 2001 and 2012 was highest among the two oldest age categories with the 60 and over population growing by 142 percent, and the population 45 to 59 growing by 117 percent. Projections for 2021 suggest that there will continue to be growth across all age categories, with the 20 to 24 population, 25 to 29 population, and the 60 and over population all likely to grow faster than other groups.

Table 4.2. Loudoun County Population Disaggregated by Age: 2001, 2012, and 2021

Age Group	2001		2012		Change from 2001 to 2012		2021*		Change from 2012 to 2021*	
	#	%	#	%	#	%	#	%	#	%
19 and under	60,063	31.6	108,304	32.1	48,241	80.3	122,895	30.5	14,591	13.5
20 to 24 years	7,898	4.2	14,153	4.2	6,255	79.2	21,613	5.4	7,460	52.7
25 to 29 years	13,349	7.0	19,390	5.7	6,041	45.3	28,305	7.0	8,915	46.0
30 to 44 years	60,193	31.7	87,018	25.8	26,825	44.6	88,849	22.1	1,831	2.1
45 to 59 years	32,982	17.4	71,496	21.2	38,514	116.8	84,595	21.0	13,099	18.3
60 and Over	15,419	8.1	37,330	11.1	21,911	142.1	56,133	13.9	18,803	50.4
Total	**189,904**	**100.0**	**337,691**	**100.0**	**147,787**	**77.8**	**402,390**	**100.0**	**64,699**	**19.2**

Source: QCEW Employees - EMSI 2014.1 Class of Worker
*EMSI projections

Table 4.3 below provides the racial/ethnic breakdown of the Loudoun County population in 2001, in 2012, and projections for 2021. The majority of the population was white in 2001 and 2012; however, the proportion of the white population declined from 78 percent in 2001 to 61 percent in 2012 and is projected to be 57 percent in 2021. The white population grew 38 percent between 2001 and 2012, which was significantly lower than growth in the same time period among the Asian population (330 percent growth), Hispanic population (238 percent growth), and the population identifying as two or more races (226 percent growth). Projections for 2021 suggest that non-white racial/ethnic groups will continue to grow faster than the white population. While the white population is projected to grow by 11 percent, the Asian population is projected to grow by 34 percent, the Hispanic population by 32 percent, the black population by 24 percent and the American Indian/Alaskan Native population by 22 percent.

Table 4.3. Loudoun County Population Disaggregated by Race/Ethnicity: 2001, 2012, and 2021

Race/Ethnicity	2001		2012		Change from 2001 to 2012		2021*		Change from 2012 to 2021*	
	#	%	#	%	#	%	#	%	#	%
White	148,338	78.1	205,086	60.7	56,748	38.3	228,092	56.7	23,006	11.2
Black	12,873	6.8	25,442	7.5	12,569	97.6	31,492	7.8	6,050	23.8
Hispanic	12,840	6.8	43,408	12.9	30,568	238.1	57,271	14.2	13,863	31.9
Asian	12,238	6.4	52,670	15.6	40,432	330.4	70,617	17.5	17,947	34.1
American Indian or Alaskan Native	336	0.2	578	0.2	242	72.0	706	0.2	128	22.1
Native Hawaiian or Pacific Islander	111	0.1	188	0.1	77	69.4	244	0.1	56	29.8
Two or More Races	3,169	1.7	10,319	3.1	7,150	225.6	13,966	3.5	3,647	35.3
Total	**189,905**	**100.0**	**337,691**	**100.0**	**147,786**	**77.8**	**402,388**	**100.0**	**64,697**	**19.2**

Source: QCEW Employees - EMSI 2014.2 Class of Worker
*EMSI projections

II. Education

Table 4.4 and Figure 4.1 (both next page) provide data on the educational attainment levels of the Loudoun County population age 25 and older in 2001, in 2012, and projections for 2021. The data show an increase in educational attainment of the Loudoun County population with the percent of the population holding a Bachelor's degree or higher increasing from 50 percent in 2001 to 58 percent in 2012. The proportion of the Loudoun County population with a Bachelor's degree or higher is projected to maintain that level (58 percent) in 2021.

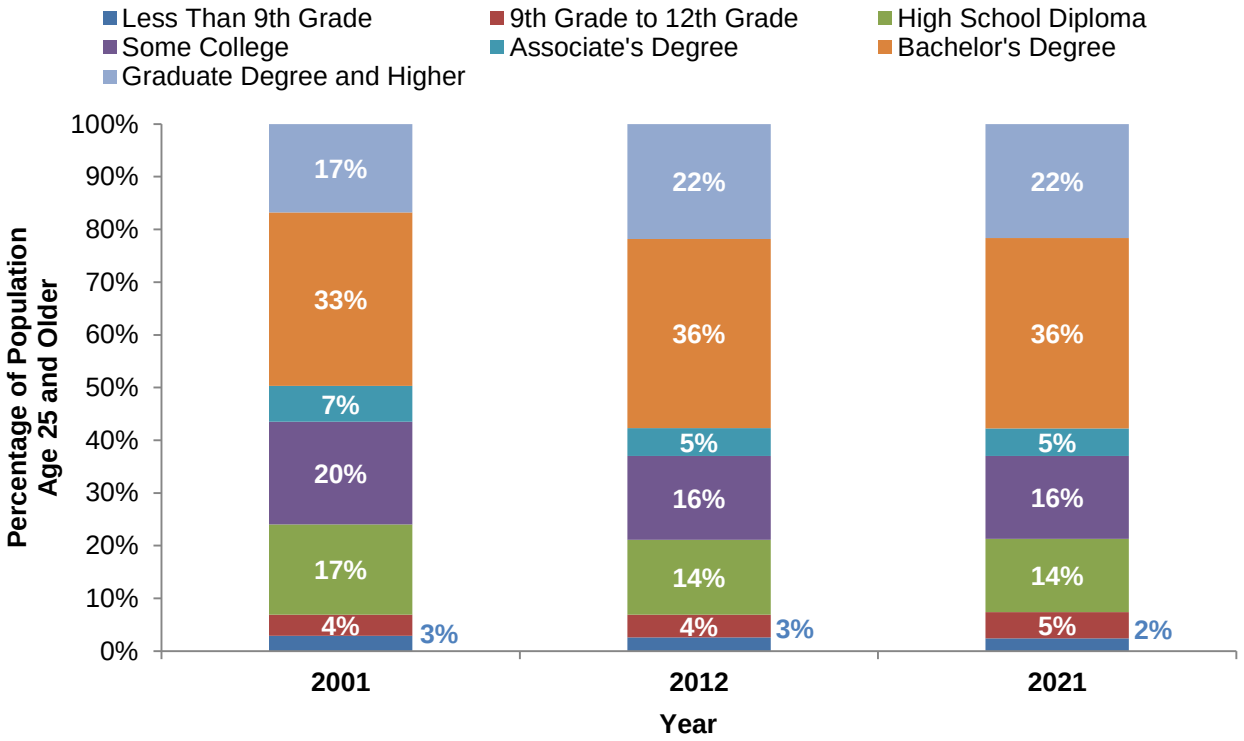
Between 2001 and 2012, the proportion of the Loudoun County population with the highest level of education (graduate degree or higher) increased by about 5 percentage points. The proportion of the population with an Associate's degree decreased proportionally between 2001 and 2012 (from 7 to 5 percent). However there was a 37 percent increase in the number of residents with an Associate's degree and a further 17 percent increase is projected by 2021.

Table 4.4. Educational Attainment of the Loudoun County Population Age 25 and Older: 2001, 2012, and 2021

Educational Attainment	2001		2012		% Change from 2001 to 2012	2021*		% Change from 2012 to 2021*
	#	%	#	%		#	%	
Less Than 9th Grade	3,498	2.9	5,618	2.6	60.6	6,147	2.4	9.4
9th Grade to 12th Grade	4,900	4.0	9,351	4.3	90.8	13,275	5.1	42.0
High School Diploma	20,905	17.1	30,508	14.2	45.9	35,941	13.9	17.8
Some College	23,752	19.5	34,181	15.9	43.9	40,525	15.7	18.6
Associate's Degree	8,320	6.8	11,398	5.3	37.0	13,290	5.2	16.6
Bachelor's Degree	40,124	32.9	77,307	35.9	92.7	93,109	36.1	20.4
Graduate Degree and Higher	20,445	16.8	46,871	21.8	129.3	55,594	21.6	18.6
Population Age 25 and Older	**121,944**	**100.0**	**215,234**	**100.0**	**76.5**	**257,881**	**100.0**	**19.8**

Source: QCEW Employees - EMSI 2014.2 Class of Worker
*EMSI projections

Figure 4.1. Educational Attainment of the Loudoun County Population Age 25 and Older by Education Level: 2001, 2012, and 2021



III. Employment

Table 4.5 presents the employment status of the Loudoun County population in 2000 and 2012. In Loudoun County, the working age population (population age 16 years and older) and the civilian labor force grew by 100 and 99 percent, respectively. The civilian labor force accounted for 77 percent of the total working age population in 2000 and 2012. The population in the Armed Forces increased by 52 percent between 2000 and 2012, but continued to account for less than half of 1 percent of the total working age population. Figure 4.2 depicts the employment status of the population age 16 and older in Loudoun County in 2012.

Table 4.5. Employment Status of Loudoun County Population Age 16 and Older: 2000 and 2012

Employment Status	2000		2012		% Change from 2000 to 2012
	#	%	#	%	
Civilian Labor Force	95,184	77.1	189,342	76.9	98.9
Employed	93,258	–	181,980	–	95.1
Unemployed	1,926	–	7,362	–	282.2
Not in Labor Force	27,735	22.5	56,197	22.8	102.6
Armed Forces	502	0.4	765	0.3	52.4
Population Age 16 and Older	**123,421**	**100.0**	**246,304**	**100.0**	**99.6**

Sources: U.S. Census Bureau, Census 2000, Table DP-3;
U.S. Census Bureau, 2012 American Community Survey, Table DP03

Figure 4.2. Employment Status of Loudoun County Population Age 16 and Older: 2012

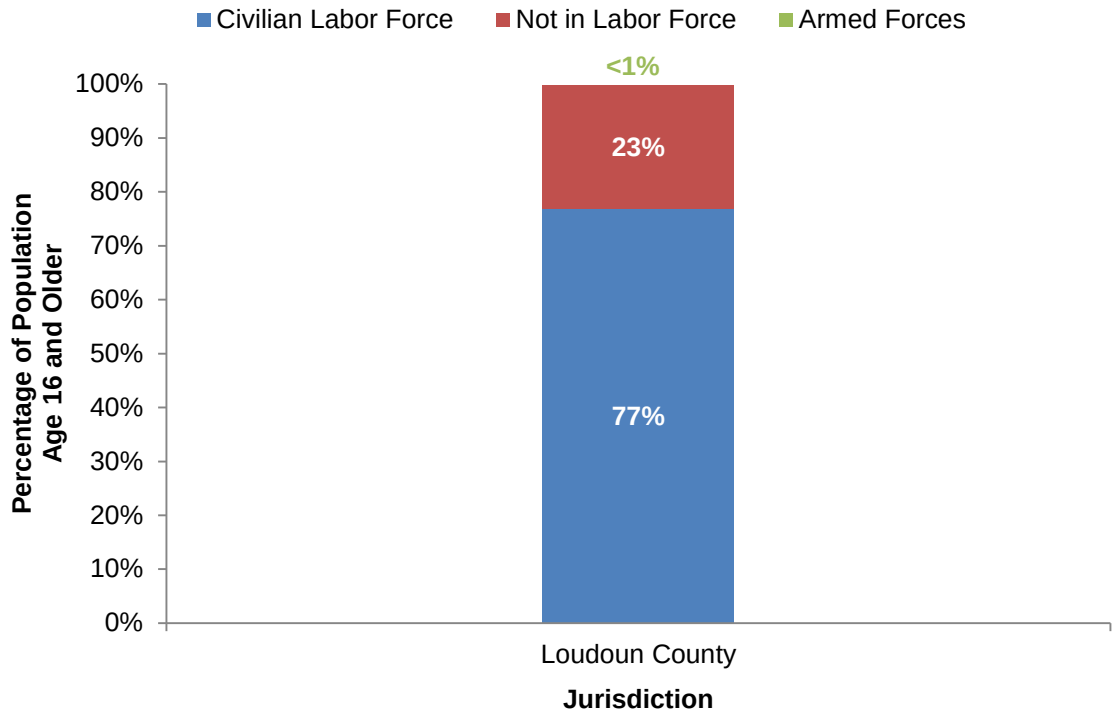


Table 4.6 presents labor force participation rates in Loudoun County, Virginia and the United States in 2012. The labor force participation rate in Loudoun County (77 percent) was higher than the Virginia state (67 percent) and national (64 percent) labor force participation rates in 2012.

Table 4.6. Labor Force Participation Rates in Loudoun County, Virginia, and the United States: 2012

Area	Civilian Labor Force	Civilian Population Age 16 and Older	Labor Force Participation Rate (%)
Loudoun County	189,342	245,539	77.1
Virginia	4,221,840	6,318,183	66.8
United States	154,975,000	243,284,000	63.7

Sources: U.S. Census Bureau, 2012 American Community Survey (county data)
U.S. Bureau of Labor Statistics, States and Selected Areas (state data) and Labor Force Statistics from the Current Population Survey (national data)

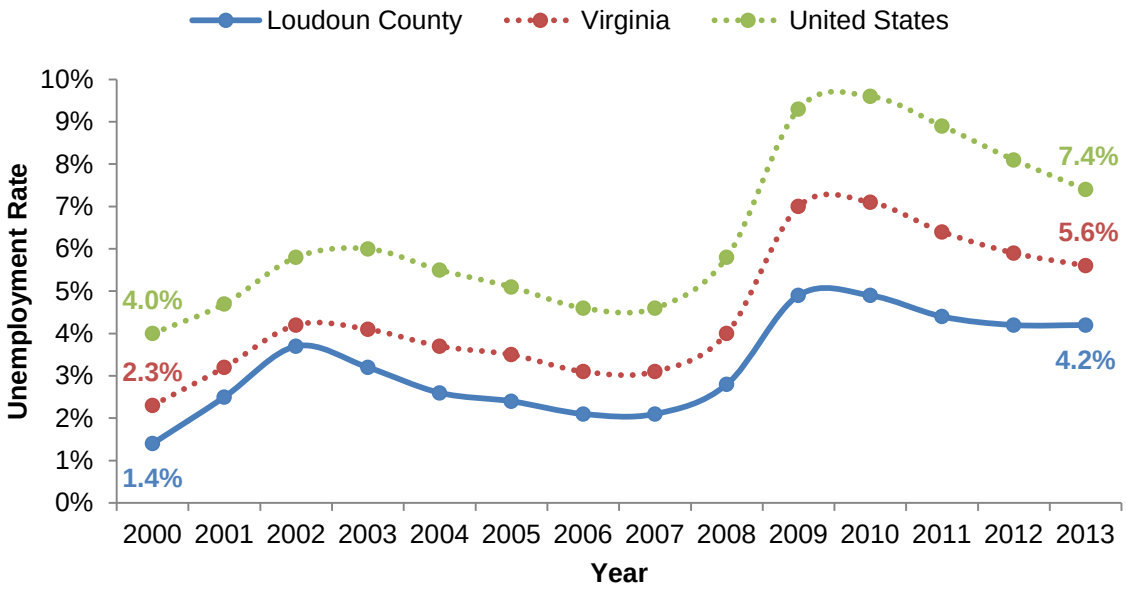
Table 4.7 and Figure 4.3 (next page) present unemployment rates for Loudoun County, Virginia, and the United States from 2000 through 2013. For all years presented, Virginia experienced unemployment rates below the national average, and Loudoun County experienced unemployment rates below the Virginia average. In 2013, the unemployment rate was 4.2 percent in Loudoun County, 5.6 percent in Virginia, and 7.4 percent nationally. In general, at all levels, unemployment hit a high in 2010 and decreased between 2010 and 2013.

Table 4.7. Unemployment Rates for Loudoun County, Virginia, and the United States: 2000 through 2013

Year	Unemployment Rate (%)		
	Loudoun County	Virginia	United States
2000	1.4	2.3	4.0
2001	2.5	3.2	4.7
2002	3.7	4.2	5.8
2003	3.2	4.1	6.0
2004	2.6	3.7	5.5
2005	2.4	3.5	5.1
2006	2.1	3.1	4.6
2007	2.1	3.1	4.6
2008	2.8	4.0	5.8
2009	4.9	7.0	9.3
2010	4.9	7.1	9.6
2011	4.4	6.4	8.9
2012	4.2	5.9	8.1
2013	4.2	5.6	7.4

Source: U.S. Bureau of Labor Statistics, Local Area Unemployment Statistics, not seasonally adjusted

Figure 4.3. Unemployment Rates for Loudoun County: 2000 through 2013



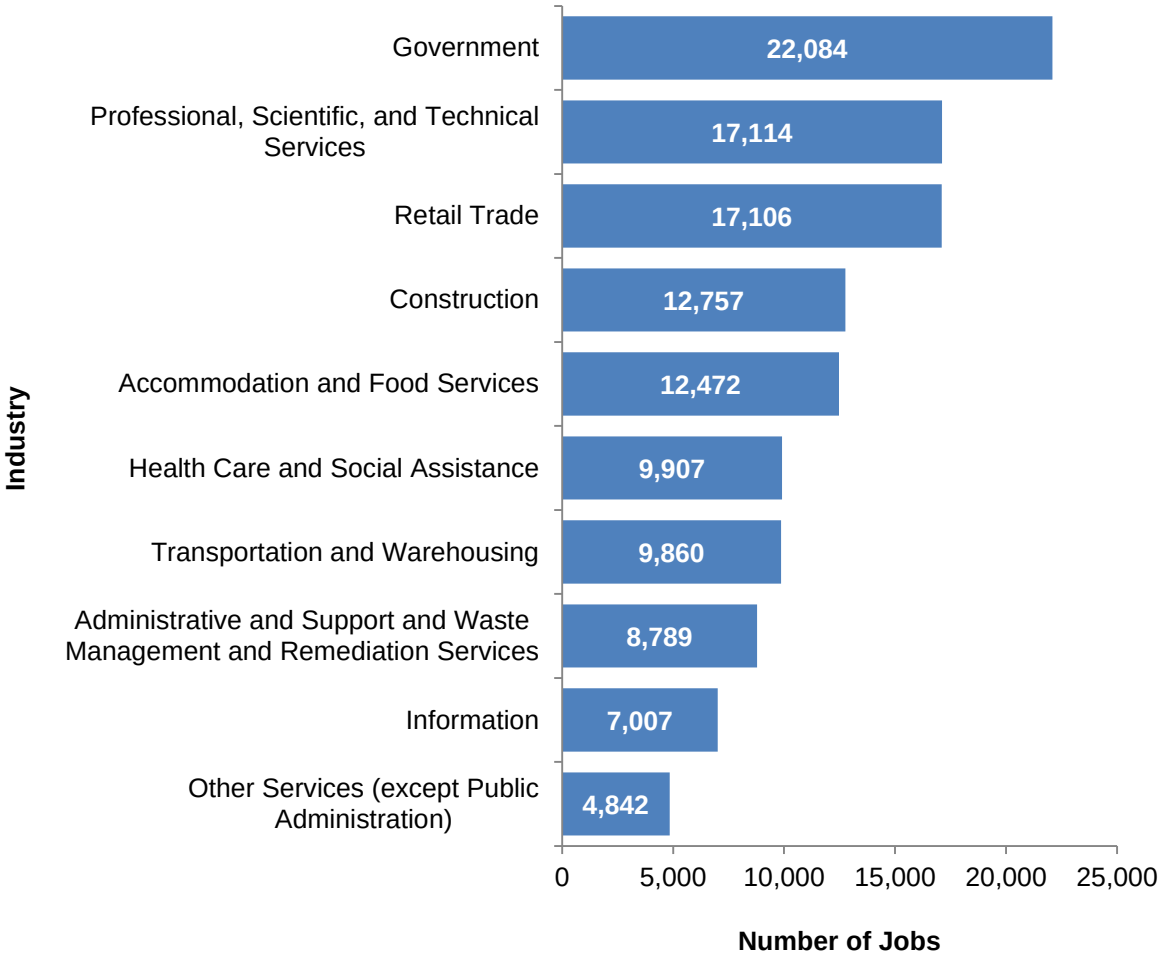
Data on employment by industry for Loudoun County in 2001, in 2012, and projections for 2021 are presented in Table 4.8 (next page) and Figure 4.4 (following page). Between 2001 and 2012, the fastest growing industries in Loudoun County were educational services (188 percent), professional, scientific, and technical services (138 percent), and health care and social assistance (120 percent). These industries are also projected to be among the fastest growing industries between 2012 and 2021. However in 2012, educational services comprised less than 2 percent of total jobs. In 2012, government was the top industry, comprising 16 percent of total jobs (22,084 jobs), followed by professional, scientific and technical services (12 percent), and then retail trade (also 12 percent). In 2021, these three industries combined are projected to continue to account for around 40 percent of total jobs in the Loudon County area.

Table 4.8. Employment by Industry in Loudoun County: 2001, 2012, and 2021

Industry	2001		2012		% Change from 2001 to 2012	2021*		% Change from 2012 to 2021*
	#	%	#	%		#	%	
Accommodation and Food Services	7,401	7.6	12,472	8.8	68.5	16,792	9.0	34.6
Administrative and Support and Waste Management and Remediation Services	4,908	5.1	8,789	6.2	79.1	12,978	6.9	47.7
Agriculture, Forestry, Fishing and Hunting	366	0.4	471	0.3	28.8	448	0.2	-5.0
Arts, Entertainment, and Recreation	1,344	1.4	2,285	1.6	70.0	3,235	1.7	41.6
Construction	9,983	10.3	12,757	9.0	27.8	17,530	9.4	37.4
Educational Services (Private)	798	0.8	2,297	1.6	187.8	3,897	2.1	69.7
Finance and Insurance	1,794	1.8	2,959	2.1	65.0	4,176	2.2	41.1
Government	13,801	14.2	22,084	15.6	60.0	26,221	14.0	18.7
Health Care and Social Assistance	4,510	4.6	9,907	7.0	119.7	14,513	7.7	46.5
Information	10,704	11.0	7,007	5.0	-34.5	10,202	5.4	45.6
Management of Companies and Enterprises	715	0.7	1,264	0.9	76.8	1,469	0.8	16.2
Manufacturing	4,326	4.5	4,809	3.4	11.2	6,164	3.3	28.2
Mining, Quarrying, and Oil and Gas Extraction	190	0.2	121	0.1	-36.1	84	<0.1	-30.2
Other Services (except Public Administration)	2,539	2.6	4,842	3.4	90.7	6,460	3.4	33.4
Professional, Scientific, and Technical Services	7,187	7.4	17,114	12.1	138.1	25,392	13.5	48.4
Real Estate and Rental and Leasing	1,081	1.1	1,795	1.3	66.1	2,462	1.3	37.1
Retail Trade	10,505	10.8	17,106	12.1	62.8	21,507	11.5	25.7
Transportation and Warehousing	12,234	12.6	9,860	7.0	-19.4	9,715	5.2	-1.5
Unclassified Industry	0	0.0	<10	<0.1	–	0	0.0	–
Utilities	141	0.1	120	0.1	-14.7	140	0.1	16.3
Wholesale Trade	2,562	2.6	3,184	2.3	24.3	4,051	2.2	27.2
Total Jobs	**97,088**	**100.0**	**141,245**	**100.0**	**45.5**	**187,435**	**100.0**	**32.7**

Source: EMSI, Table 2014.2 – QCEW Employees
*EMSI Projections

Figure 4.4. Top 10 Industries in Loudoun County by Number of Jobs: 2012



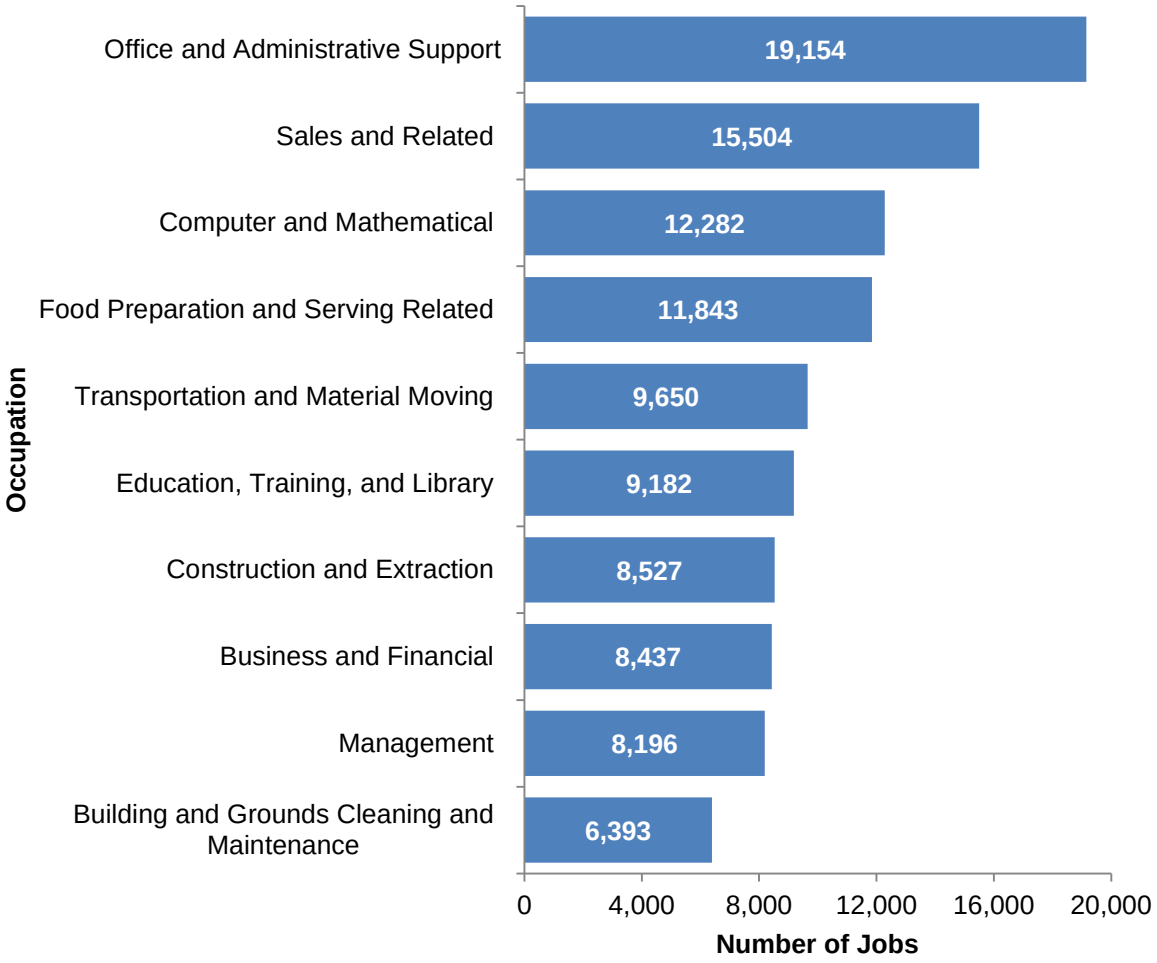
Data on employment by occupation for Loudoun County in 2001, in 2012, and projections for 2021 are presented in Table 4.9 (next page) and Figure 4.5 (following page). In 2012, the top occupations were office and administrative support (14 percent), sales and related (11 percent), and computer and mathematical (9 percent). These occupations are projected to remain in the top three in 2021. The occupations with the fastest rates of growth between 2000 and 2012 were protective service (110 percent), community and social service (106 percent), and healthcare support (103 percent), but they also only accounted for 3 percent, 1 percent, and 2 percent, respectively, of total jobs in 2012.

Table 4.9. Employment by Occupation in Loudoun County: 2001 through 2021

Occupation	2001		2012		% Change from 2001 to 2012	2021*		% Change from 2001 to 2012*
	#	%	#	%		#	%	
Architecture and Engineering	2,065	2.1	2,888	2.0	39.9	3,890	2.1	34.7
Arts, Design, Entertainment, Sports, and Media	1,197	1.2	1,985	1.4	65.8	2,680	1.4	35.0
Building and Grounds Cleaning and Maintenance	3,644	3.8	6,393	4.5	75.5	8,959	4.8	40.1
Business and Financial	5,539	5.7	8,437	6.0	52.3	11,135	5.9	32.0
Community and Social Service	556	0.6	1,142	0.8	105.5	1,543	0.8	35.2
Computer and Mathematical	6,744	6.9	12,282	8.7	82.1	17,841	9.5	45.3
Construction and Extraction	6,710	6.9	8,527	6.0	27.1	11,571	6.2	35.7
Education, Training, and Library	4,836	5.0	9,182	6.5	89.9	12,625	6.7	37.5
Farming, Fishing, and Forestry	293	0.3	383	0.3	30.7	390	0.2	1.9
Food Preparation and Serving Related	6,590	6.8	11,843	8.4	79.7	16,280	8.7	37.5
Healthcare Practitioners and Technical	2,172	2.2	4,194	3.0	93.1	5,794	3.1	38.1
Healthcare Support	1,012	1.0	2,049	1.5	102.5	3,036	1.6	48.1
Installation, Maintenance, and Repair	5,170	5.3	6,101	4.3	18.0	8,822	4.7	44.6
Legal	725	0.7	1,120	0.8	54.5	1,296	0.7	15.8
Life, Physical, and Social Science	443	0.5	696	0.5	56.9	884	0.5	27.1
Management	5,512	5.7	8,196	5.8	48.7	10,720	5.7	30.8
Office and Administrative Support	16,040	16.5	19,154	13.6	19.4	23,754	12.7	24.0
Personal Care and Service	2,333	2.4	4,660	3.3	99.7	6,320	3.4	35.6
Production	2,994	3.1	3,330	2.4	11.2	4,177	2.2	25.4
Protective Service	1,679	1.7	3,531	2.5	110.3	4,617	2.5	30.8
Sales and Related	11,327	11.7	15,504	11.0	36.9	20,063	10.7	29.4
Transportation and Material Moving	9,506	9.8	9,650	6.8	1.5	11,038	5.9	14.4
Total Jobs	**97,088**	**100.0**	**141,245**	**100.0**	**45.5**	**187,435**	**100.0**	**32.7**

Source: EMSI, Table 2014.2 – QCEW Employees
*EMSI Projections

Figure 4.5. Top 10 Occupations in Loudoun County by Number of Jobs: 2012



IV. Employer Profile

Table 4.10 (next page) displays the major employers (by estimated total number of employees) in Loudoun County in 2014, along with a brief description of each major employer's business function. Employing between 2,500 and 4,999 individuals, AOL, Inc. (internet services) was the largest single employer located in Loudon County. M. C. Dean, Inc. (trade contractors), United Airlines Inc. (air transportation services), and Verizon Business (telecommunications) each reported employing between 1,500 and 2,499 individuals.

Table 4.10. Top Employers in Loudoun County: 2014

Employers	Estimated Number of Employees	Type of Business
AOL, Inc.	2,500-4,999	Internet service
M. C. Dean, Inc.	1,500-2,499	Trade contractors
United Airlines Inc.	1,500-2,499	Air transportation services
Verizon Business	1,500-2,499	Telecommunications
Orbital Sciences Corporation	1,000-1,499	Aerospace Products
Raytheon Technical Services Company	600-999	Professional and technical services
Founders Inn & Lansdowne Resort	600-999	Conference resort
Homeland Security	600-999	Safety activities
Metropolitan Washington Airports Authority	600-999	Public administration
N.E.W. Corporation	600-999	Finance and insurance
VeriSign, Inc.	600-999	Professional, scientific, and technical services
Computer Sciences Corp.	300-599	Professional and technical services
George Washington University	300-599	Educational services
J K Moving and Storage	300-599	Truck transportation
Neustar, Inc.	300-599	Professional and technical services
Rockwell Collins Simulation	300-599	Professional, scientific, and technical services
Swissport	300-599	Support activities for transportation
Telos Corporation	300-599	Government services
Rehau, Inc.	100-299	Management of companies
Howard Hughes Medical Institute	100-299	Professional, scientific, and technical services

Source: Virginia Economic Development Partnership (VEDP) Community Profiles-Loudoun County

V. Federal Government Procurement

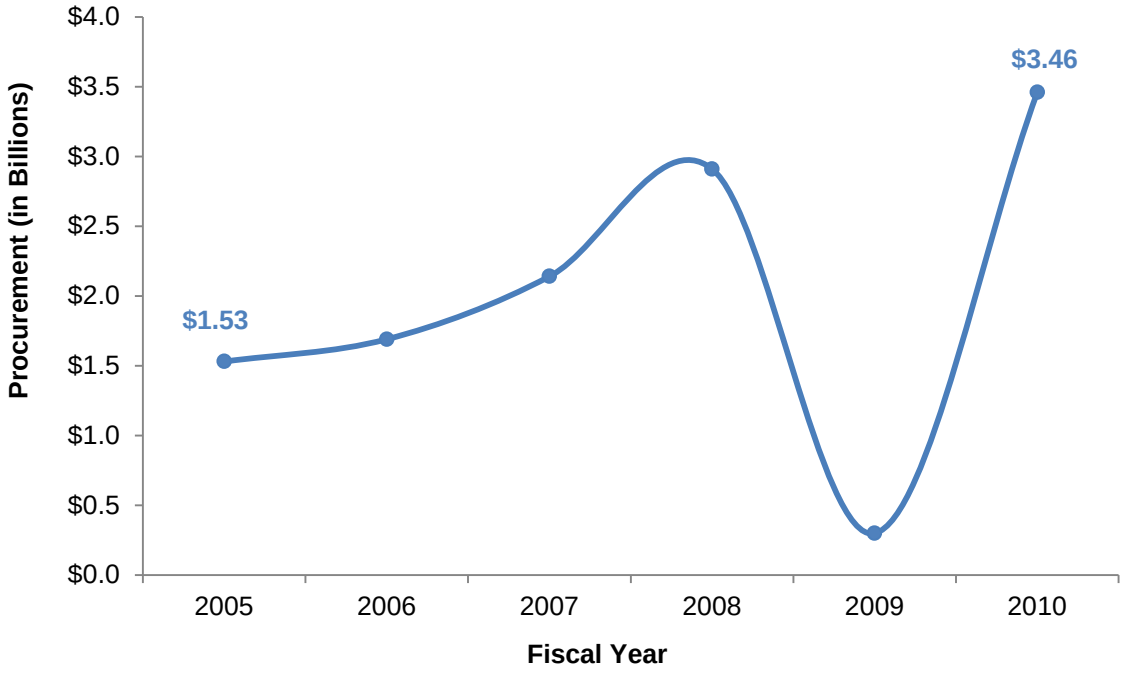
Table 4.11 and Figure 4.6 (both next page) present data on federal government procurement from firms located in Loudoun County for fiscal years 2005 through 2010. Total federal government procurement for firms located in Loudoun County increased 126 percent from 2005 to 2010.

Table 4.11. Federal Government Procurement in Loudoun County: Fiscal Years 2005 through 2010 (in U.S. Dollars)

Jurisdiction	Year						% Change 2005 to 2010
	2005	2006	2007	2008	2009	2010	
Loudoun County	1,530,293,000	1,686,566,000	2,139,739,000	2,909,238,000	295,348,000	3,463,593,000	126.3

Source: U.S. Census Bureau, Consolidated Federal Funds Report (CFFR) 2005 to 2010
Federal Financial Statistics program was terminated in 2012; therefore, the CFFR 2010 is the most recent available report
Amounts are not adjusted for inflation

Figure 4.6. Federal Government Procurement in Loudoun County: Fiscal Years 2005 through 2010 (in Billions of U.S. Dollars)



VI. Income

Tables 4.12 and 4.13 and Figure 4.7 (next page) present the 1999 and 2012 annual per capita and median household income of Loudoun County residents. Figures for 1999 have been converted to 2012 constant U.S. dollars to adjust for inflation. Between 1999 and 2012, the annual per capita personal income level for Loudoun County residents increased by 3 percent from $44,043 to $45,507. Between 1999 and 2012, the median household income level for Loudoun County residents increased by 11 percent from $105,935 to $117,876.

Table 4.12. Annual Per Capita Income for Loudoun County Residents: 1999 and 2012

Jurisdiction	Annual Per Capita Income ($)		% Change from 1999 to 2012
	1999*	2012	
Loudoun County	44,043	45,507	3.3

Sources: U.S. Census Bureau, Census 2000, Table DP-3;
U.S. Census Bureau, 2012 American Community Survey, Table DP03
*U.S. Dollars for 1999 were converted to 2012 constant U.S. Dollars using the BEA Implicit Price Deflator

Table 4.13. Median Annual Household Income for Loudoun County Residents: 1999 and 2012

Jurisdiction	Median Annual Household Income ($)		% Change from 1999 to 2012
	1999*	2012	
Loudoun County	105,935	117,876	11.3

Sources: U.S. Census Bureau, Census 2000, Table DP-3;
U.S. Census Bureau, 2012 American Community Survey, Table DP03
*U.S. Dollars for 1999 were converted to 2012 constant U.S. Dollars using the BEA Implicit Price Deflator

Figure 4.7. Annual Per Capita Income and Median Household Income for Loudoun County Residents: Percent Change from 1999 to 2012

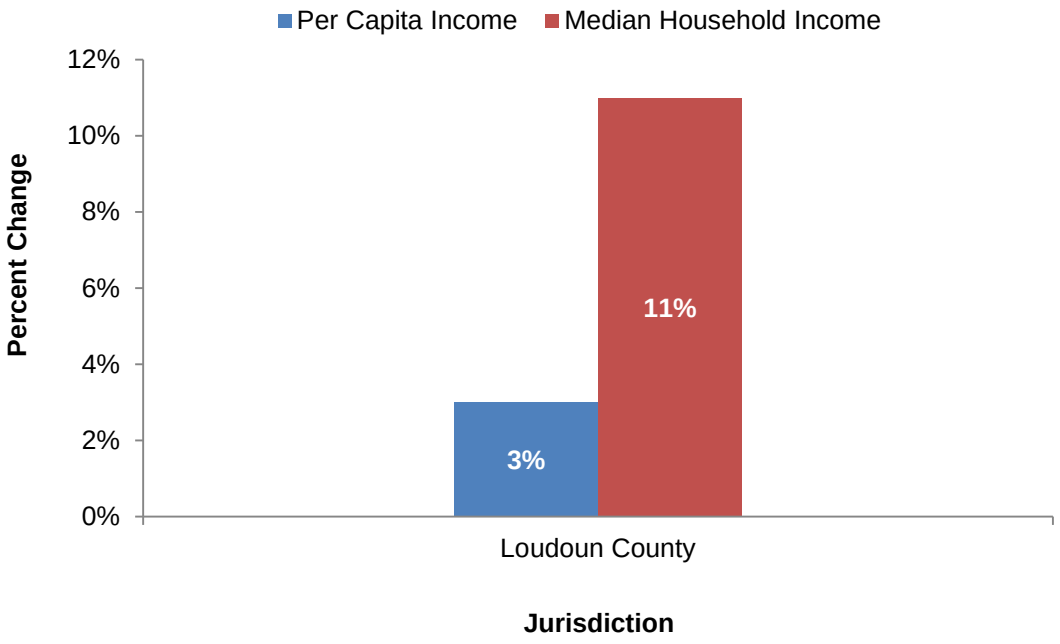


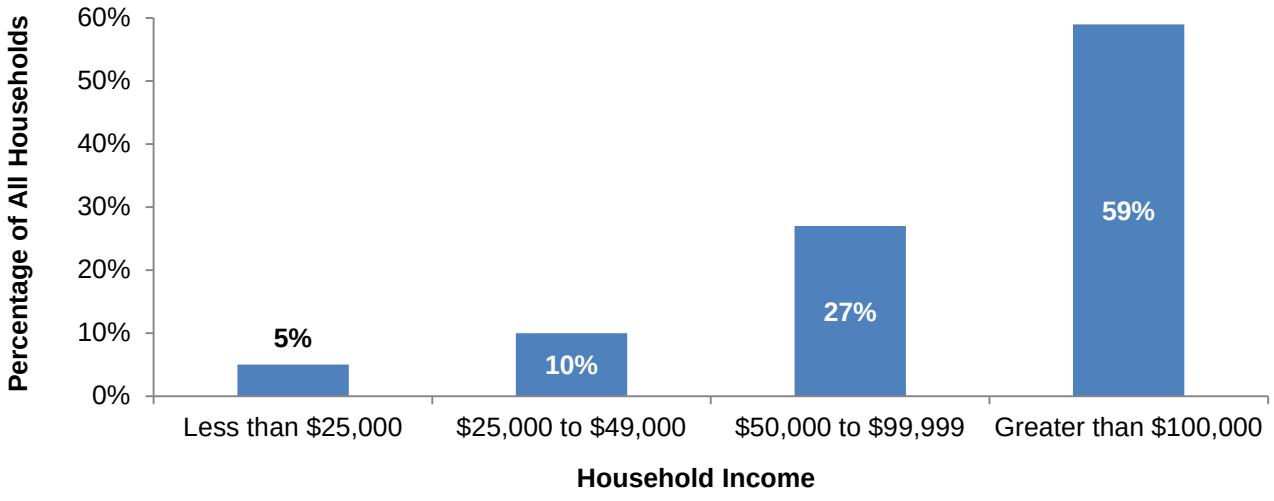
Table 4.14 and Figure 4.8 present the distribution of annual household income levels for Loudoun County residents in 2012. In 2012, the largest proportion of Loudoun County households had income levels between $100,000 and $149,999 (23 percent). Nearly 60 percent of Loudoun County households reported an income of $100,000 and over, while less than 5 percent reported a household income of less than $25,000.

Table 4.14. Annual Household Income Distribution for Loudoun County Residents: 2012

Household Income and Benefits	Loudoun County	
	#	%
Less than $10,000	993	0.9
$10,000 to $14,999	1,121	1.0
$15,000 to $24,999	3,190	2.9
$25,000 to $34,999	2,979	2.7
$35,000 to $49,999	7,386	6.8
$50,000 to $74,999	14,108	13.0
$75,000 to $99,999	15,313	14.1
$100,000 to $149,999	24,609	22.7
$150,000 to $199,999	18,173	16.7
Greater than $200,000	20,687	19.1
Total Households	**108,559**	**100.0**

Source: U.S. Census Bureau, 2012 American Community Survey, Table DP03

Figure 4.8. Annual Household Income Distribution for Loudoun County Residents: 2012



VII. Real Estate

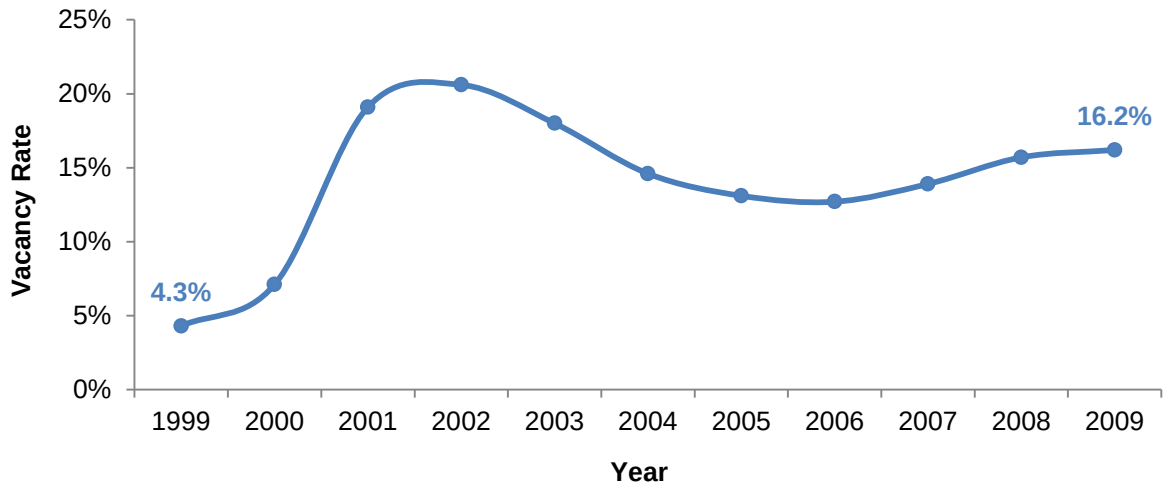
Table 4.15 and Figure 4.9 present data on Loudoun County office and flex/industrial vacancy rates from 1999 through 2009. The total office and flex/industrial vacancy rate in Loudoun County exhibited an upward trend from 1999 to 2002, reaching 21 percent, then decreased from 2003 to 2006 to less than 13 percent. From 2007 to 2009, rates increased again to 16 percent. There was a 12 percentage point increase overall in the total office and flex/industrial vacancy rate between 1999 and 2009.

Table 4.15. Office and Flex/Industrial Vacancy Rates in Loudoun County: 1999 through 2009

Year	Vacancy Rate (%)		Total (%)
	Office	Flex/Industry	
1999	7.8	1.9	4.3
2000	9.7	5.4	7.1
2001	19.3	18.9	19.1
2002	19.5	21.4	20.6
2003	16.3	19.2	18.0
2004	12.8	15.9	14.6
2005	10.0	15.1	13.1
2006	11.7	13.3	12.7
2007	13.6	14.2	13.9
2008	18.9	13.3	15.7
2009	16.6	15.8	16.2

Source: Loudoun Government Document Center

Figure 4.9. Total Office and Flex/Industrial Vacancy Rate for Loudoun County: 1999 through 2009



The number and median price of housing units sold in Loudoun County are presented in Table 4.16 (below) and Figures 4.10 and 4.11 (both next page). The number of housing units sold in Loudoun County spiked drastically from 2000 to 2004, increasing by nearly 87 percent during that time period. However, the number of housing units sold in Loudoun County began to decrease in 2005 and reached a low in 2011. Between 2005 and 2006 the number of units sold decreased sharply, from 9,106 to 5,908, a 35 percent decline. Between 2011 and 2013, the number of housing units sold in Loudoun County increased by over 30 percent.

The historical median prices for housing units sold in Loudoun County were converted to 2013 constant U.S. dollars to control for inflation. The median price of housing units sold in Loudoun County increased by 115 percent from $267,123 in 2000 to a high of $574,315 in 2005. Between 2005 and 2009, the median price of housing units sold fell by over 35 percent to $368,229, before returning to an increasing trend and reaching a median price of $450,000 in 2013. From 2000 to 2013, the median price of housing units sold in Loudoun County increased by nearly 70 percent.

Table 4.16. Number and Median Price of Housing Units Sold in Loudoun County: 2000 through 2013

Year	# of Units Sold	Median Price ($)*
2000	4,997	$267,123
2001	6,166	$300,505
2002	6,704	$333,807
2003	8,218	$383,852
2004	9,344	$472,885
2005	9,106	$574,315
2006	5,908	$562,718
2007	5,231	$484,841
2008	5,502	$392,575
2009	5,405	$368,229
2010	5,054	$411,237
2011	4,450	$423,581
2012	5,151	$410,984
2013	5,858	$450,000
% Change from 2000 to 2013	**17.2**	**68.5**

Source: Real Estate Business Intelligence
*All median prices of housing units have been converted to constant 2013 U.S. Dollars using BEA Implicit Price Deflator; median prices are from June of the specified year.

Figure 4.10. Number of Housing Units Sold in Loudoun County: 2000 through 2013

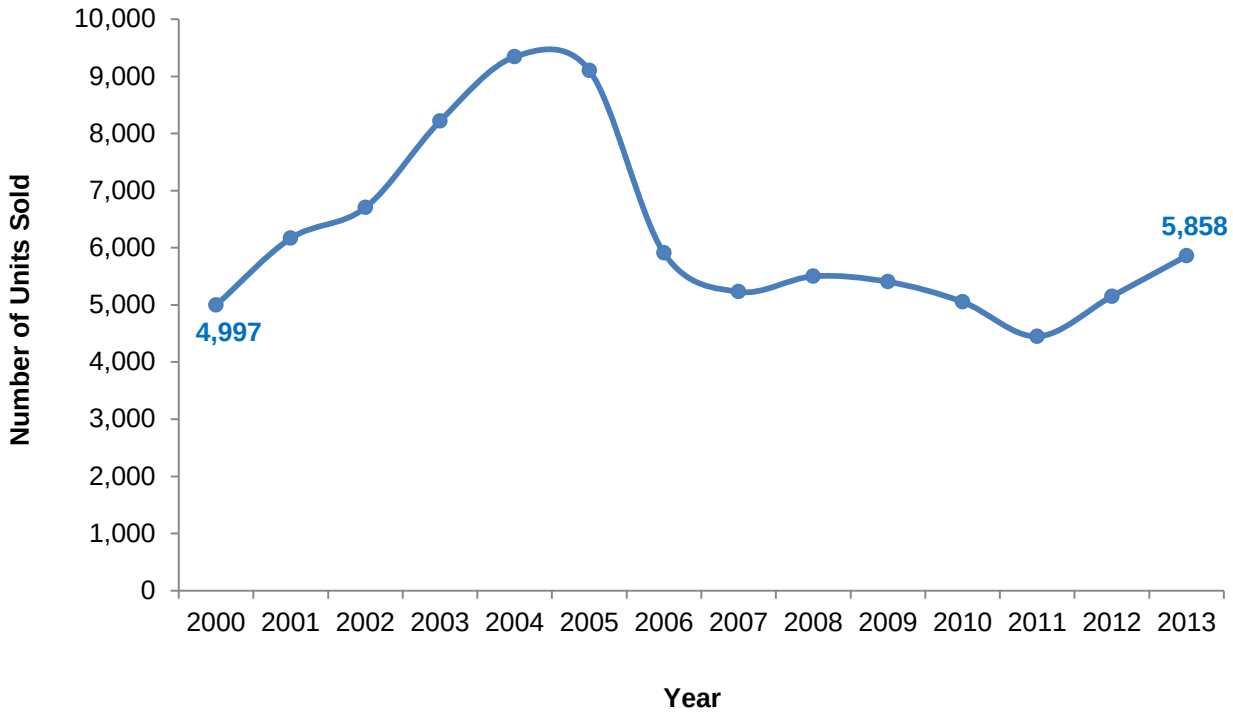
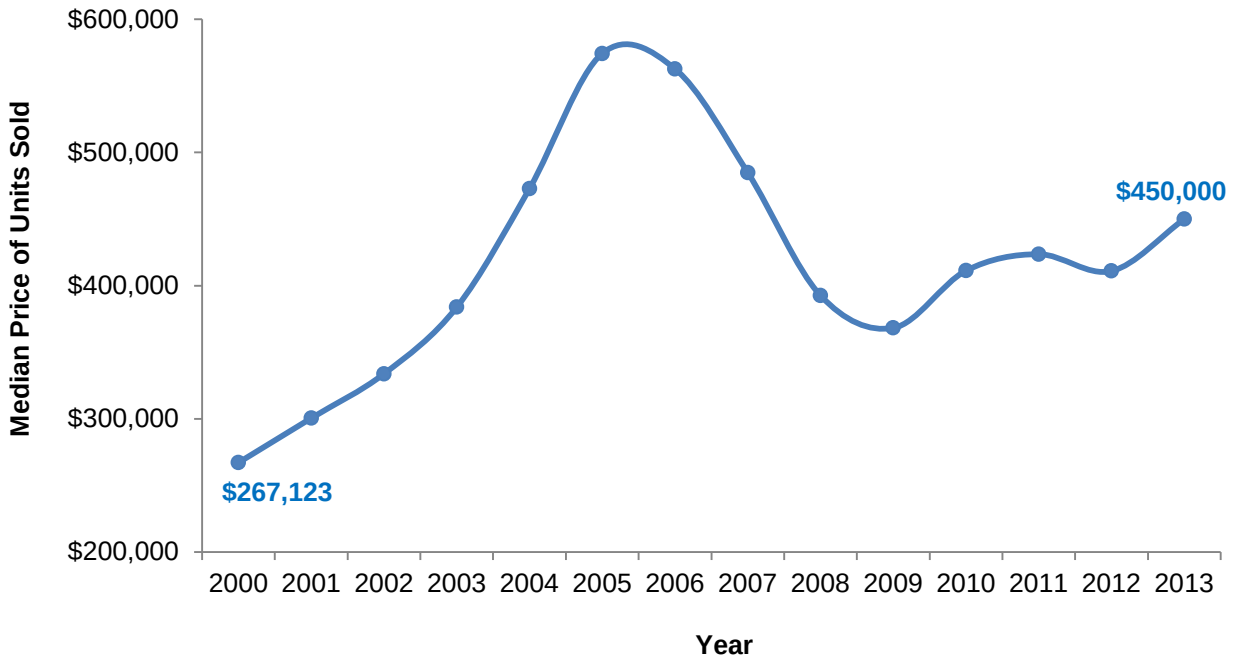
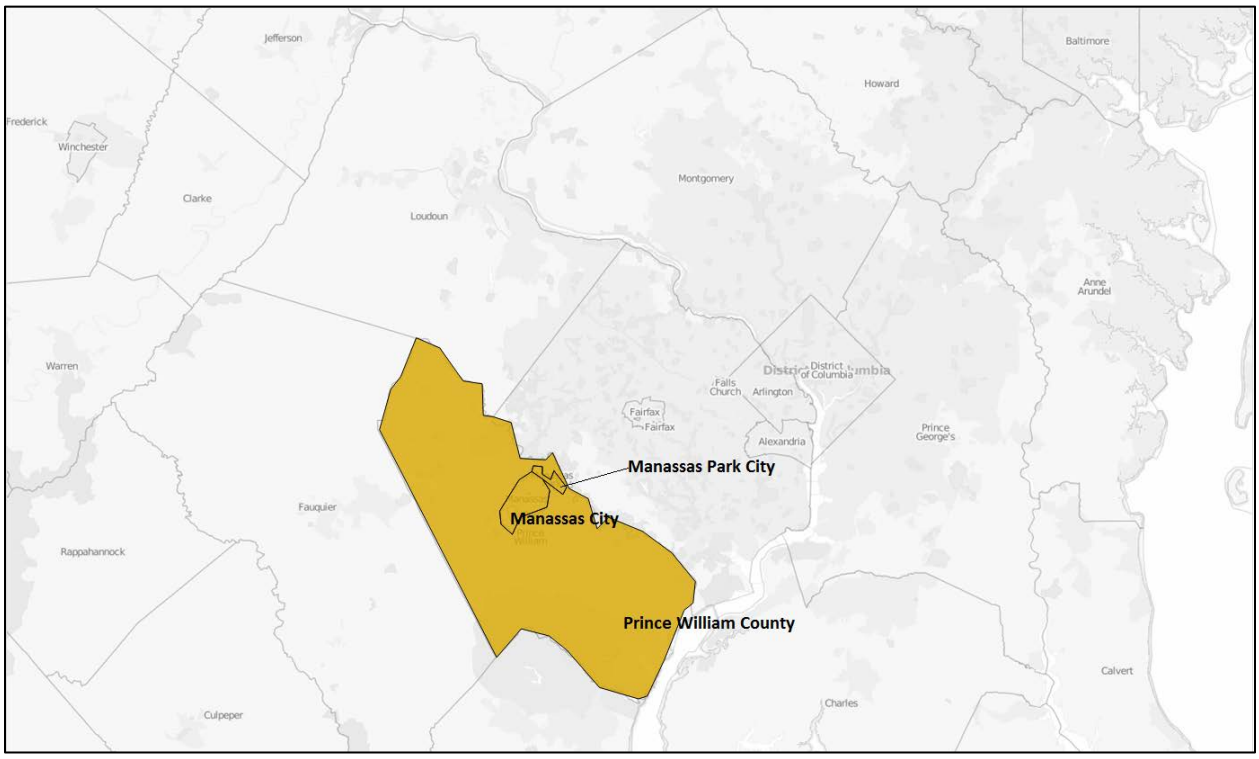


Figure 4.11. Median Price of Housing Units Sold in Loudoun County: 2000 through 2013



Chapter 5. Economic Profile of Prince William County, Manassas City, and Manassas Park City



Chapter 5. Economic Profile of Prince William County, Manassas City, and Manassas Park City

Summary

Population Growth and Demographic Shifts

- Between 2001 and 2012, Prince William County experienced a population increase of 45 percent while the population increased by 14 percent in Manassas City and by 48 percent in Manassas Park City.
- The population in each of the three regions is projected to further increase between 2012 and 2021. Prince William County is projected to grow by 17 percent, Manassas City by 12 percent, and Manassas Park City by 21 percent. The expected growth across all regions could translate to an advantage for the College through an increase in prospective students.
- The age demographic of these three regions is projected to change. The 60 years and over populations in all three regions are projected to more than double in size, relatively, as compared to 2012, and this age group is by far the fastest growing in all three regions. Age groups normally associated with "traditional college-age" – the 20 to 24 year old population and the 25 to 29 population – are projected to increase overall in all three regions between 2012 and 2021.
- The racial/ethnic demographics across each of the three regions changed significantly from 2001 to 2012, but the proportions are projected to remain more consistent in 2021. In Prince William County, the white population is projected to continue being the largest group in 2021 (44 percent), but will constitute a smaller portion of the population as compared to 2001 (63 percent). Between 2012 and 2021, rapid growth is projected among those of two or more races (32 percent), the Asian population (28 percent), and the Hispanic population (26 percent) in Prince William County. All racial/ethnic groups in this county are predicted to grow at a higher rate than the white population.
- In Manassas City, the white population constituted 67 percent and the Hispanic population was 16 percent in 2001. However, by 2021, a significant shift is projected. The white population is projected to constitute 39 percent of the population and the Hispanic population is projected to reach 36 percent of the population. Between 2012 and 2021, the black, Asian, and Hispanic populations are each expected to increase by 23 to 26 percent.
- A similar shift was seen in Manassas Park City. In 2001, the white population constituted 65 percent and the Hispanic population was 19 percent. In 2021, the Manassas Park City population is projected to have approximately equal white and Hispanic populations, with each accounting for about 36 percent of the population in Manassas Park City. Projections for 2021 suggest that all racial/ethnic groups are predicted to grow at faster rates than the white population.

Educational Attainment

- In Prince William County, between 2001 and 2012, the proportion of the population with a Bachelor's degree or higher increased from 33 to 37 percent, and is projected to account for 35 percent of the population in 2021. The number of residents with an Associate's degree increased by 42 percent from 2001 to 2012 and is projected to increase by 19 percent from 2012 to 2021. However, the proportion of the Prince William County population holding an Associate's degree as their highest level of educational attainment is expected to remain at 7 percent in 2021.
- In Manassas City, the proportion of the population with a Bachelor's degree or higher is expected to remain around 28 percent through 2021. The proportion of the population with an Associate's degree is projected to remain at approximately 7 percent of the Manassas City population through 2021. However, the number of residents with an Associate's degree increased by 29 percent between 2001 and 2012, and is expected to increase an additional 15 percent by 2021.
- In Manassas Park City, between 2001 and 2012, the proportion of the population with a Bachelor's degree or higher increased from 21 to 22 percent and is projected to be 21 percent in 2021. The proportion of the population with an Associate's degree as their highest level of educational attainment increased from 7 percent in 2001 to10 percent in 2012 and is projected to be 9 percent in 2021.The number of residents with an Associate's degree increased by 126 percent between 2001 and 2012 and is expected to increase an additional 11 percent by 2021.

Economic Indicators

- Federal government procurement levels fluctuated sharply in this region. Between 2005 and 2010, overall, federal procurement increased 561 percent in Prince William County, 40 percent in Manassas City, and 129 percent in Manassas Park City.
- In 2012, the labor force participation rate was 76 percent in Prince William County, 73 percent in Manassas City, and 76 percent in Manassas Park City, as compared to the state participation rate of 67 percent.
- In 2013, the unemployment rate was 4.9 percent in Prince William County, 5.1 in Manassas City, and 4.7 percent in Manassas Park City, all of which were lower than the state rate (5.6 percent) and the national rate (7.4 percent).
- In Prince William County from 1999 to 2012, the annual per capita income increased by 10 percent and median household income increased by 11 percent. During the same period, both annual per capita and median household income decreased by 11 percent in Manassas City. In Manassas Park City, annual per capita decreased by 1 percent and median household income decreased by 10 percent.
- Overall, between 2000 and 2013, the median price of housing in the region increased by 76 percent in Prince William County, 62 percent in Manassas City, and 82 percent in Manassas Park City.
- From 2013 to 2014, the office vacancy rate in Prince William County increased by less than half of a percentage point, the flex space vacancy rate decreased by 4 percentage points, and the industrial vacancy rate decreased by almost 1 percentage point.

Employment Trends

- Between 2012 and 2021, employment in Prince William and Manassas City is projected to increase 29 and 8 percent, respectively. Employment in Manassas Park City is projected to decrease by 0.4 percent.
- In Prince William County, the following industries are projected to be the largest in 2021: government (21 percent), retail trade (18 percent), and construction (11 percent). Health care support-related occupations are projected to grow at the highest rate (52 percent) from 2012 to 2021 (1,012 new jobs).
- In Manassas City, professional, scientific and technical services (18 percent), healthcare and social assistance (17 percent), and government (13 percent) are expected to be the largest industries in 2021.
- In Manassas Park City, government (27 percent), construction (25 percent), and retail trade (11 percent) are projected to be the largest industries in 2021.

I. Population

Table 5.1 presents population data for Prince William County, Manassas City, and Manassas Park City in 2001, in 2012, and projections for 2021. From 2001 to 2012, each of the three regions exhibited significant population growth. Of the three regions, Manassas Park City, though the smallest in size, experienced the largest population growth rate at 48 percent. Prince William County grew by 45 percent and Manassas City grew by 14 percent. Projections for 2021 suggest that the populations across all three regions will continue to increase. Between 2012 and 2021, Manassas Park City is projected to grow at a faster rate than the other two regions (21 percent); while Prince William County is projected to grow by 17 percent and Manassas City by 12 percent over the same time period.

Table 5.1. Prince William County, Manassas City, and Manassas Park City Population: 2001, 2012, and 2021

Region	2001 Population	2012 Population	Change from 2001 to 2012		2021 Population*	Change from 2012 to 2021*	
			#	%		#	%
Prince William County	298,852	432,528	133,676	44.7%	505,125	72,597	16.8%
Manassas City	35,339	40,126	4,787	13.5%	44,966	4,840	12.1%
Manassas Park City	10,777	15,921	5,144	47.7%	19,185	3,264	20.5%

Source: QCEW Employees – EMSI 2014.2 Class of Workers
*EMSI Projections

Tables 5.2, 5.3, and 5.4 (next pages) provide the age distribution of the Prince William County, Manassas City, and Manassas Park City populations in 2001, 2012, and projections for 2021. In Prince William County, the population age 19 and younger constituted the largest population in 2001, in 2012, and is projected to remain so in 2021. There was substantial population growth across all age groups (ranging from 22 to 122 percent). The population growth among the two oldest age categories was significantly higher than other age groups. The population age 45 to 59 grew 63 percent, and it constituted 21 percent of the population in 2012 as compared to about 18 percent of the population in 2001. The age 60 and over population in Prince William County more than doubled (122 percent growth) between 2001 and 2012. Projections for 2021 suggest that the highest growth will again occur among the population age 60 and over (54 percent), and it is projected to make up 16 percent of the Prince William County population in 2021 as compared to 8 percent in 2001.

Similarly, in Manassas City, the 19 and younger age group constituted the largest group in 2001, in 2012, and is projected to remain so in 2021. There has been positive growth ranging from 7 to 60 percent for all age groups with the exception of the population age 30 to 44 which saw a 5 percent decrease between 2001 and 2012. The population age 60 and over grew at the highest rate (60 percent) over this time period – accounting for about 12 percent of the 2012 population as compared to about 9 percent in 2001. Projections for 2021 indicate that the population age 60 and over will continue to grow at the highest rate in Manassas City (61

percent). Future growth is also predicted for other age groups, with the exception of the population age 25 to 29 and the population age 45 to 59, which are expected to see slight decreases in overall population numbers.

Similar to Prince William County and Manassas City, the youngest age group (19 and under) constituted the largest group of the Manassas Park City population in 2001, in 2012, and is projected to do so in 2021. The data show that there was significant growth across all age categories at Manassas Park City (ranging from 27 to 86 percent) between 2001 and 2012. The two oldest age groups – the population age 45 to 59 and the population age 60 and over – grew at the highest rates between 2001 and 2012 (86 and 76 percent, respectively). Projections for 2021 suggest that there will continue to be positive growth among all age groups. The population age 60 and over is projected to grow significantly more than other age groups (77 percent).

Table 5.2. Prince William County Population Disaggregated by Age: 2001, 2012, and 2021

Age Group	2001		2012		Change from 2001 to 2012		2021*		Change from 2012 to 2021*	
	#	%	#	%	#	%	#	%	#	%
19 and under	96,986	32.5	133,066	30.8	36,080	37.2	151,209	29.9	18,143	13.6
20 to 24 years	19,532	6.5	26,510	6.1	6,978	35.7	30,722	6.1	4,212	15.9
25 to 29 years	21,547	7.2	30,981	7.2	9,434	43.8	33,653	6.7	2,672	8.6
30 to 44 years	82,610	27.6	101,108	23.4	18,498	22.4	114,714	22.7	13,606	13.5
45 to 59 years	54,847	18.4	89,162	20.6	34,315	62.6	95,441	18.9	6,279	7.0
60 and Over	23,328	7.8	51,702	12.0	28,374	121.6	79,386	15.7	27,684	53.5
Total	**298,850**	**100.0**	**432,529**	**100.0**	**133,679**	**44.7**	**505,125**	**100.0**	**72,596**	**16.8**

Source: QCEW Employees - EMSI 2014.1 Class of Worker
*EMSI Projections

Table 5.3. Manassas City Population Disaggregated by Age: 2001, 2012, and 2021

Age Group	2001		2012		Change from 2001 to 2012		2021*		Change from 2012 to 2021*	
	#	%	#	%	#	%	#	%	#	%
19 and under	11,491	32.5	12,263	30.6	772	6.7	13,453	29.9	1,190	9.7
20 to 24 years	2,409	6.8	2,761	6.9	352	14.6	3,045	6.8	284	10.3
25 to 29 years	2,522	7.1	3,291	8.2	769	30.5	3,227	7.2	-64	-1.9
30 to 44 years	9,551	27.0	9,073	22.6	-478	-5.0	9,672	21.5	599	6.6
45 to 59 years	6,373	18.0	7,957	19.8	1,584	24.9	7,871	17.5	-86	-1.1
60 and Over	2,995	8.5	4,780	11.9	1,785	59.6	7,698	17.1	2,918	61.0
Total	**35,341**	**100.0**	**40,125**	**100.0**	**4,784**	**13.5**	**44,966**	**100.0**	**4,841**	**12.1**

Source: QCEW Employees - EMSI 2014.1 Class of Worker
*EMSI Projections

Table 5.4. Manassas Park City Population Disaggregated by Age: 2001, 2012, and 2021

Age Group	2001		2012		Change from 2001 to 2012		2021*		Change from 2012 to 2021*	
	#	%	#	%	#	%	#	%	#	%
19 and under	3,627	33.7	4,959	31.1	1,332	36.7	5,957	31.1	998	20.1
20 to 24 years	715	6.6	1,094	6.9	379	53.0	1,337	7.0	243	22.2
25 to 29 years	905	8.4	1,554	9.8	649	71.7	1,656	8.6	102	6.6
30 to 44 years	3,227	29.9	4,112	25.8	885	27.4	4,705	24.5	593	14.4
45 to 59 years	1,495	13.9	2,778	17.4	1,283	85.8	3,011	15.7	233	8.4
60 and Over	809	7.5	1,425	8.9	616	76.1	2,519	13.1	1,094	76.8
Total	**10,778**	**100.0**	**15,922**	**100.0**	**5,144**	**47.7**	**19,185**	**100.0**	**3,263**	**20.5**

Source: QCEW Employees - EMSI 2014.1 Class of Worker
*EMSI Projections

Tables 5.5, 5.6, and 5.7 (next pages) provide a racial/ethnic breakdown of the populations in Prince William County, Manassas City, and Manassas Park City in 2001, in 2012, and projections for 2021. Data for Prince William County show that the white population will continue to form the largest group in 2021. However, it will constitute a smaller portion of the population in 2021 (44 percent) as compared to 2001 (63 percent). All racial/ethnic groups grew in population in Prince William County between 2001 and 2012 although the white population grew at a slower rate (9 percent growth) as compared to the Hispanic population (172 percent), Asian population (169 percent), black population (55 percent), and those of two or more races (119 percent). Projections for 2021 suggest that there will be growth across all racial/ethnic groups, with the highest growth rate occurring among those of two or more races (32 percent), the Asian population (28 percent) and the Hispanic population (26 percent). All racial/ethnic groups are predicted to grow at higher rates than the white population.

In Manassas City, the white population constituted the largest group in 2001, 2012, and is projected to do so in 2021. In 2001, the white population constituted 67 percent and the Hispanic population was 16 percent; but by 2021, a significant shift is projected. The white population is projected to decrease to 39 percent of the population and the Hispanic population is projected to reach 36 percent of the population. Projections for 2021 suggest that while the white population in Manassas City is expected to decrease by 3 percent from 2012 to 2021, the black, Asian, and Hispanic populations are each expected to grow between 23 to 26 percent.

Similar to Manassas City, the white population constituted the majority in Manassas Park City in 2001 but followed a downward trend. The proportion of the white population in Manassas Park City decreased from 65 percent in 2001 to 41 percent in 2012, and is projected to be 36 percent in 2021. From 2001 to 2012, while the white population decreased by 7 percent, the black, Asian, and Hispanic populations in Manassas Park City all more than doubled which has led to an overall population growth of 48 percent in the area. Projections for 2021 suggest that non-white racial/ethnic groups are predicted to grow at faster rates than the white population. The Asian and the black populations are each projected to experience about 33 percent growth, and the Hispanic population is expected to experience 27 percent growth. In 2021, the Manassas

Park City population is projected to have approximately equal portions of white and Hispanic residents with each accounting for about 36 percent of the population.

Table 5.5. Prince William County Population Disaggregated by Race/Ethnicity: 2001, 2012, and 2021

Race/Ethnicity	2001		2012		Change from 2001 to 2012		2021*		Change from 2012 to 2021*	
	#	%	#	%	#	%	#	%	#	%
White	189,050	63.3	205,290	47.5	16,240	8.6	221,818	43.9	16,528	8.1
Black	56,013	18.7	86,761	20.1	30,748	54.9	104,716	20.7	17,955	20.7
Hispanic	33,057	11.1	90,048	20.8	56,991	172.4	113,845	22.5	23,797	26.4
Asian	12,645	4.2	34,000	7.9	21,355	168.9	43,370	8.6	9,370	27.6
American Indian or Alaskan Native	912	0.3	1,047	0.2	135	14.8	1,136	0.2	89	8.5
Native Hawaiian or Pacific Islander	363	0.1	465	0.1	102	28.1	514	0.1	49	10.5
Two or More Races	6,811	2.3	14,916	3.4	8,105	119.0	19,725	3.9	4,809	32.2
Total	**298,851**	**100.0**	**432,527**	**100.0**	**133,676**	**44.7**	**505,124**	**100.0**	**72,597**	**16.8**

Source: QCEW Employees - EMSI 2014.1 Class of Worker
*EMSI Projections

Table 5.6. Manassas City Population Disaggregated by Race/Ethnicity: 2001, 2012, and 2021

Race/Ethnicity	2001		2012		Change from 2001 to 2012		2021*		Change from 2012 to 2021*	
	#	%	#	%	#	%	#	%	#	%
White	23,542	66.6	18,274	45.5	-5,268	-22.4	17,647	39.2	-627	-3.4
Black	4,166	11.8	5,693	14.2	1,527	36.7	7,023	15.6	1,330	23.4
Hispanic	5,678	16.1	12,977	32.3	7,299	128.5	16,345	36.3	3,368	26.0
Asian	1,264	3.6	2,094	5.2	830	65.7	2,620	5.8	526	25.1
American Indian or Alaskan Native	104	0.3	113	0.3	9	8.7	132	0.3	19	16.8
Native Hawaiian or Pacific Islander	30	0.1	45	0.1	15	50.0	55	0.1	10	22.2
Two or More Races	554	1.6	929	2.3	375	67.7	1,144	2.5	215	23.1
Total	**35,338**	**100.0**	**40,125**	**100.0**	**4,787**	**13.5**	**44,966**	**100.0**	**4,841**	**12.1**

Source: QCEW Employees - EMSI 2014.1 Class of Worker
*EMSI Projections

Table 5.7. Manassas Park City Population Disaggregated by Race/Ethnicity: 2001, 2012, and 2021

Race/Ethnicity	2001		2012		Change from 2001 to 2012		2021*		Change from 2012 to 2021*	
	#	%	#	%	#	%	#	%	#	%
White	6,971	64.7	6,452	40.5	-519	-7.4	6,926	36.1	474	7.3
Black	1,068	9.9	2,137	13.4	1,069	100.1	2,846	14.8	709	33.2
Hispanic	1,993	18.5	5,381	33.8	3,388	170.0	6,839	35.6	1,458	27.1
Asian	507	4.7	1,449	9.1	942	185.8	1,935	10.1	486	33.5
American Indian or Alaskan Native	40	0.4	35	0.2	-5	-12.5	40	0.2	5	14.3
Native Hawaiian or Pacific Islander	5	<0.1	26	0.2	21	420.0	35	0.2	9	34.6
Two or More Races	192	1.8	441	2.8	249	129.7	564	2.9	123	27.9
Total	**10,776**	**100.0**	**15,921**	**100.0**	**5,145**	**47.7**	**19,185**	**100.0**	**3,264**	**20.5**

Source: QCEW Employees - EMSI 2014.1 Class of Worker
*EMSI Projections

II. Education

Table 5.8 and Figure 5.1 (both next page) provide data on the educational attainment levels of the Prince William County population age 25 and older in 2001, 2012, and projections for 2021. The data show an increase in the educational attainment of the Prince William County population. The number of residents with a Bachelor's degree or higher increased 66 percent from 2001 to 2012 and is projected to increase by 15 percent from 2012 to 2021.

In Prince William County, the number of people with no more than a high school diploma increased by 44 percent from 2001 to 2012 (28,741 more residents). This number is projected to increase 22 percent by 2021 (20,670 more residents).

Between 2001 and 2012, the number of Prince William County residents with Associate's degrees increased by 5,548 (42 percent) and this number is projected to increase by 3,628 residents (19 percent) by 2021.

Table 5.8. Educational Attainment of the Prince William County Population Age 25 and Older: 2001, 2012, and 2021

Educational Attainment	2001		2012		% Change from 2001 to 2012	2021*		% Change from 2012 to 2021*
	#	%	#	%		#	%	
Less Than 9th Grade	8,449	4.6	13,163	4.8	55.8	13,663	4.2	3.8
9th Grade to 12th Grade	11,609	6.4	21,914	8.0	88.8	32,521	10.1	48.4
High School Diploma	44,703	24.5	58,425	21.4	30.7	67,988	21.0	16.4
Some College	44,153	24.2	61,011	22.4	38.2	72,275	22.4	18.5
Associate's Degree	13,329	7.3	18,877	6.9	41.6	22,505	7.0	19.2
Bachelor's Degree	38,243	21.0	59,749	21.9	56.2	68,231	21.1	14.2
Graduate Degree and Higher	21,848	12.0	39,815	14.6	82.2	46,010	14.2	15.6
Population Age 25 and Older	**182,334**	**100.0**	**272,954**	**100.0**	**49.7**	**323,193**	**100.0**	**18.4**

Source: QCEW Employees - EMSI 2014.2 Class of Worker
*EMSI projections

Figure 5.1. Educational Attainment of the Prince William County Population Age 25 and Older by Education Level: 2001, 2012, and 2021

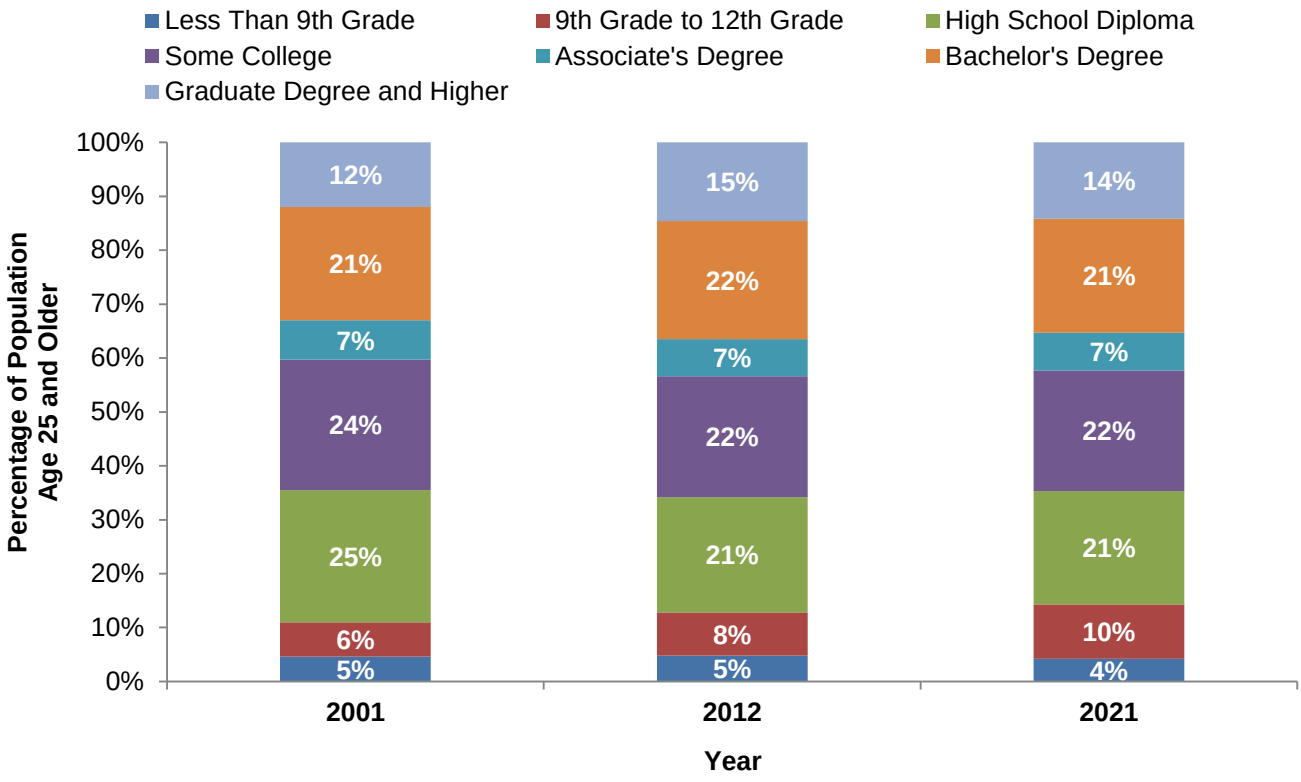


Table 5.9 and Figure 5.2 (next page) provide data on the educational attainment levels of the Manassas City population age 25 and older in 2001, in 2012, and projections for 2021. In 2001 and 2012, 29 percent of the population held a Bachelor's degree or higher, while 6 to 7 percent of the population held an Associate's degree as their highest level of educational attainment. Projections indicate these proportions will remain the same in 2021 even as the number of residents with an Associate's degree increases by 15 percent and the number holding Bachelor's and graduate degrees or higher increases by 12 and 19 percent, respectively. Manassas City residents with no more than a high school diploma are projected to increase by 15 percent between 2012 and 2021 (1,577 more residents) .

Table 5.9. Educational Attainment of the Manassas City Population Age 25 and Older: 2001, 2012, and 2021

Educational Attainment	2001		2012		% Change from 2001 to 2012	2021*		% Change from 2012 to 2021*
	#	%	#	%		#	%	
Less Than 9th Grade	1,648	7.7	2,576	10.3	56.3	2,680	9.4	4.0
9th Grade to 12th Grade	2,208	10.3	1,992	7.9	-9.8	2,471	8.7	24.0
High School Diploma	5,231	24.4	6,260	24.9	19.7	7,254	25.5	15.9
Some College	4,898	22.8	5,322	21.2	8.7	5,781	20.3	8.6
Associate's Degree	1,337	6.2	1,724	6.9	28.9	1,988	7.0	15.3
Bachelor's Degree	3,907	18.2	4,514	18.0	15.5	5,071	17.8	12.3
Graduate Degree and Higher	2,209	10.3	2,715	10.8	22.9	3,224	11.3	18.7
Population Age 25 and Older	**21,438**	**100.0**	**25,103**	**100.0**	**17.1**	**28,469**	**100.0**	**13.4**

Source: QCEW Employees - EMSI 2014.2 Class of Worker
*EMSI projections

Figure 5.2. Educational Attainment of the Manassas City Population Age 25 and Older by Education Level: 2001, 2012, and 2021

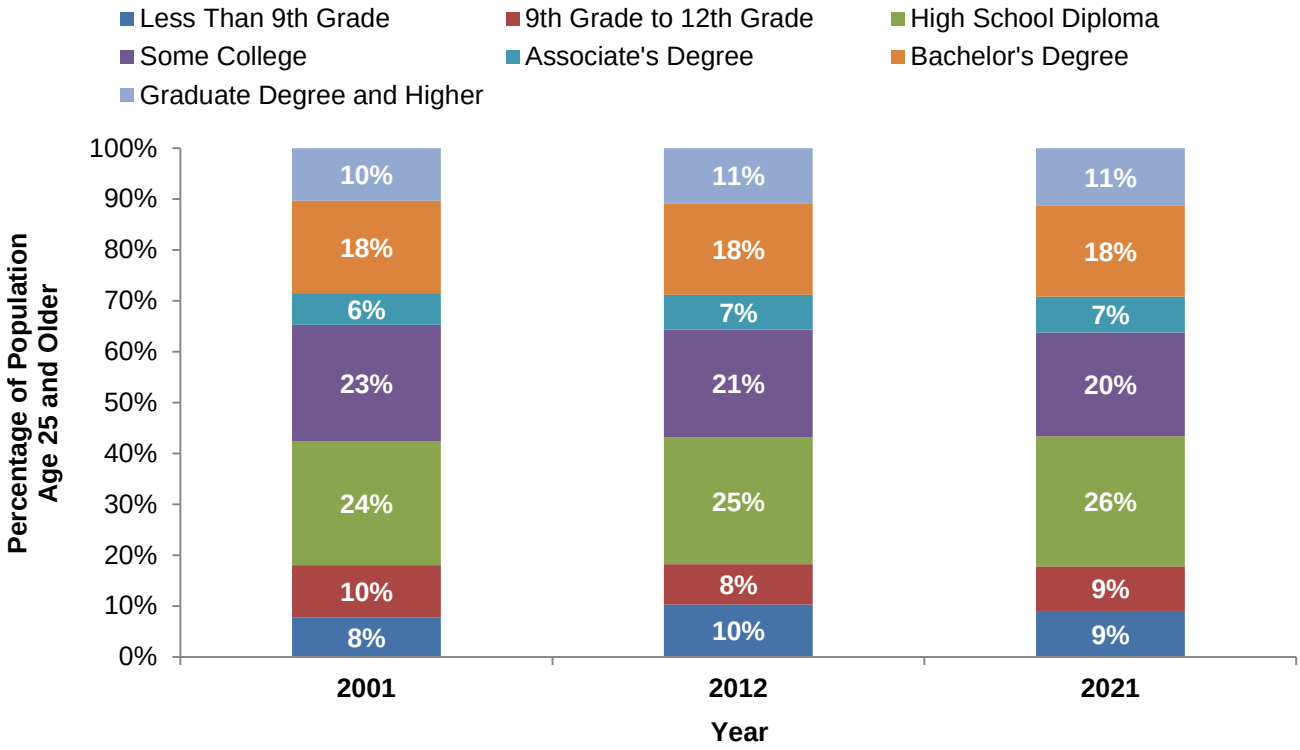


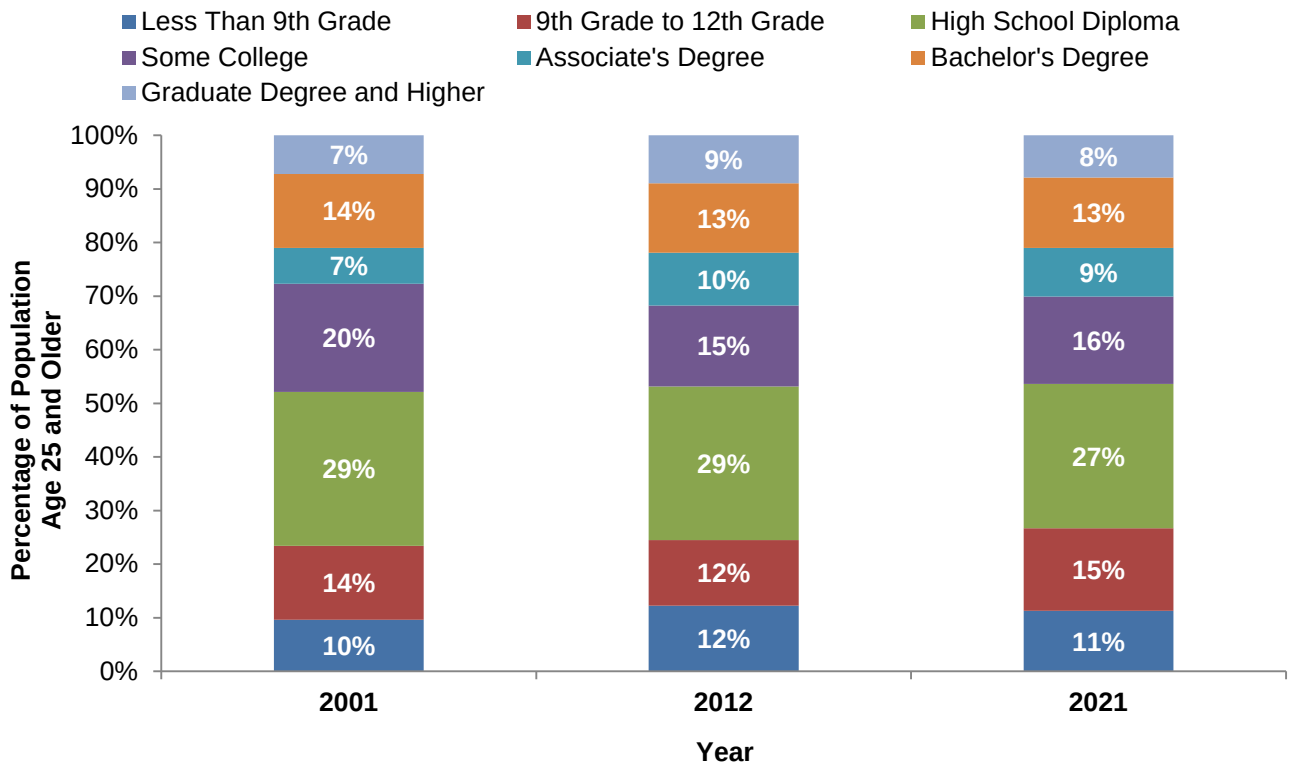
Table 5.10 and Figure 5.3 (both next page) provide data on the educational attainment levels of the Manassas Park City population age 25 and older in 2001, in 2012, and projections for 2021. The largest increase between 2001 to 2012 occurred at the Associate's level which experienced 126 percent growth and is projected to increase by 11 percent by 2021 (102 more residents). The number of Manassas Park City residents with no more than a high school diploma increased by 1,911 residents from 2001 to 2012 (57 percent) and is projected to increase by 1,109 residents by 2021 (21 percent). The Manassas Park City population with some college is projected to increase by 434 residents from 2012 to 2021 (29 percent). The proportion of the population that attained a bachelor's degree or higher was 22 percent in 2012 and is projected to remain at that level in 2021.

Table 5.10. Educational Attainment of the Manassas Park City Population Age 25 and Older: 2001, 2012, and 2021

Educational Attainment	2001		2012		% Change from 2001 to 2012	2021*		% Change from 2012 to 2021*
	#	%	#	%		#	%	
Less Than 9th Grade	618	9.6	1,211	12.3	96.0	1,346	11.3	11.1
9th Grade to 12th Grade	890	13.8	1,215	12.3	36.5	1,834	15.4	50.9
High School Diploma	1,848	28.7	2,841	28.8	53.7	3,196	26.9	12.5
Some College	1,297	20.2	1,500	15.2	15.7	1,934	16.3	28.9
Associate's Degree	432	6.7	975	9.9	125.7	1,077	9.1	10.5
Bachelor's Degree	886	13.8	1,233	12.5	39.2	1,561	13.1	26.6
Graduate Degree and Higher	462	7.2	893	9.0	93.3	942	7.9	5.5
Population Age 25 and Older	**6,433**	**100.0**	**9,868**	**100.0**	**53.4**	**11,890**	**100.0**	**20.5**

Source: QCEW Employees - EMSI 2014.2 Class of Worker
*EMSI projections

Figure 5.3. Educational Attainment of the Manassas Park City Population Age 25 and Older by Education Level: 2001, 2012, and 2021



III. Employment

Table 5.11 presents the employment status of the Prince William County population in 2000 and 2012. In Prince William County, the total working age population (population age 16 years and older) increased 58 percent and the civilian labor force increased 60 percent from 2000 to 2012. The civilian labor force accounted for 73 percent of the working age population in 2000 and increased to 74 percent in 2012. From 2000 to 2012, the armed forces population decreased 29 percent, and as a share of the total working age population, the armed forced population decreased from 4 to 2 percent.

Table 5.11. Employment Status of Prince William County Population Age 16 and Older: 2000 and 2012

Employment Status	2000		2012		% Change From 2000 to 2012
	#	%	#	%	
Civilian Labor Force	149,208	73.1	238,622	74.2	59.9
Employed	144,748	–	224,896	–	55.4
Unemployed	4,460	–	13,726	–	207.8
Not in Labor Force	46,748	22.9	77,095	24.0	64.9
Armed Forces	8,046	3.9	5,742	1.8	-28.6
Population Age 16 and Older	**204,002**	**100.0**	**321,459**	**100.0**	**57.6**

Sources: U.S. Census Bureau, Census 2000, Table DP-3; U.S. Census Bureau, 2012 American Community Survey, Table DP03

Table 5.12 presents the employment status of the Manassas City population in 2000 and 2012. The civilian labor force accounted for 74 percent of the working age population in 2000 and decreased to 73 percent in 2012. The population in the armed forces decreased 64 percent and accounted for less than one percent of the total working age population in 2012. In Manassas City, between 2000 and 2012, the total working age population increased 16 percent and the civilian labor force increased 14 percent.

Table 5.12. Employment Status of Manassas City Population Age 16 and Older: 2000 and 2012

Employment Status	2000		2012		% Change From 2000 to 2012
	#	%	#	%	
Civilian Labor Force	18,948	73.7	21,616	72.8	14.1
Employed	18,238	–	20,008	–	9.7
Unemployed	710	–	1,608	–	126.5
Not in Labor Force	6,601	25.7	8,021	27.0	21.5
Armed Forces	170	0.7	61	0.2	-64.1
Population Age 16 and Older	**25,719**	**100.0**	**29,698**	**100.0**	**15.5**

Sources: U.S. Census Bureau, Census 2000, Table DP-3; U.S. Census Bureau, 2012 American Community Survey, Table DP03

Table 5.13 presents the employment status of the Manassas Park City population in 2000 and 2012. In Manassas Park City, the total working age population increased 46 percent and the civilian labor force increased 44 percent. The civilian labor force accounted for 77 percent of the working age population in 2000 and decreased to 76 percent in 2012. The population in the armed forces increased by 115 percent between 2000 and 2012 but continued to account for around half of one percent of the total working age population. Figure 5.4 depicts the employment status of the populations in Prince William County, Manassas City, and Manassas Park City in 2012.

Table 5.13. Employment Status of Manassas Park City Population Age 16 and Older: 2000 and 2012

Employment Status	2000		2012		% Change From 2000 to 2012
	#	%	#	%	
Civilian Labor Force	5,638	76.7	8,118	75.5	44.0
Employed	5,513	–	7,767	–	40.9
Unemployed	125	–	351	–	180.8
Not in Labor Force	1,676	22.8	2,564	23.8	53.0
Armed Forces	34	0.5	73	0.7	114.7
Population Age 16 and Older	**7,348**	**100.0**	**10,755**	**100.0**	**46.4**

Sources: U.S. Census Bureau, Census 2000, Table DP-3; U.S. Census Bureau, 2012 American Community Survey, Table DP03

Figure 5.4. Employment Status of Prince William County, Manassas City, and Manassas Park City Population Age 16 and Older: 2012

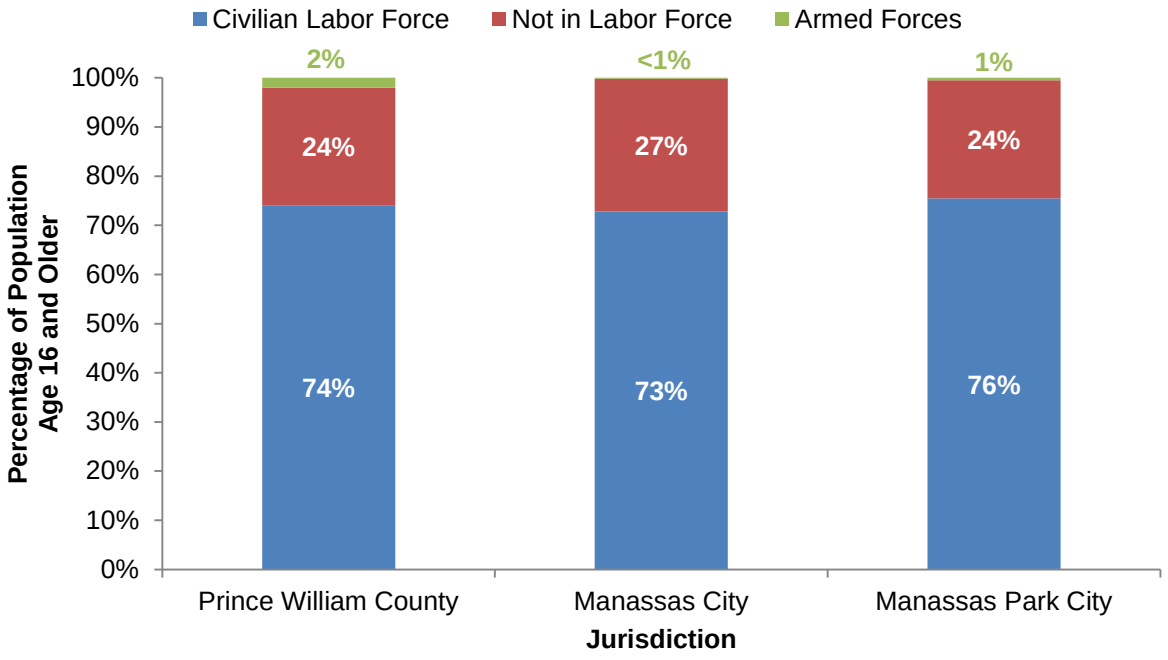


Table 5.14 presents the 2012 labor force participation rates for Prince William County, Manassas City, Manassas Park City, Virginia, and the United States. The civilian labor force participation rates in Prince William County (76 percent), Manassas City (73 percent) and Manassas Park City (76 percent) were higher than the Virginia (67 percent) and the national (64 percent) labor force participation rates.

Table 5.14. Labor Force Participation Rates in Prince William County, Manassas City, Manassas Park City, Virginia, and the United States: 2012

Area	Civilian Labor Force	Civilian Population Age 16 and Older	Labor Force Participation Rate (%)
Prince William County	238,622	315,717	75.6
Manassas City	21,616	29,637	72.9
Manassas Park City	8,118	10,682	76.0
Virginia	4,221,840	6,318,183	66.8
United States	154,975,000	243,284,000	63.7

Sources: U.S. Census Bureau, 2012 American Community Survey (county level data); U.S. Bureau of Labor Statistics, State and Selected Areas (state data) and Labor Force Statistics from the Current Population Survey (national data)

Table 5.15 and Figure 5.5 (next page) present unemployment rates for Prince William County, Manassas City, Manassas Park City, Virginia, and the United States from 2000 to 2013. The unemployment rates in Prince William County and Manassas Park City were below the Virginia state unemployment rate and the national rate. At several points over this time period, the unemployment rate in Manassas City was higher than the Virginia rate; however, it remained consistently below the national rate. In general, unemployment hit a high across all regions between 2009 and 2010 and decreased between 2010 and 2013.

Table 5.15. Unemployment Rates for Prince William County, Manassas City, Manassas Park City, Virginia, and the United States: 2000 through 2013

Year	Unemployment Rate (%)				
	Prince William County	Manassas City	Manassas Park City	Virginia	United States
2000	1.8	1.7	1.4	2.3	4.0
2001	2.5	3.2	1.8	3.2	4.7
2002	3.4	4.3	2.8	4.2	5.8
2003	3.4	3.4	2.6	4.1	6.0
2004	2.9	3.0	2.7	3.7	5.5
2005	2.7	2.8	2.5	3.5	5.1
2006	2.4	2.6	2.3	3.1	4.6
2007	2.5	2.9	2.6	3.1	4.6
2008	3.3	4.2	3.8	4.0	5.8
2009	5.7	7.6	6.3	7.0	9.3
2010	5.9	6.4	6.1	7.1	9.6
2011	5.4	5.5	5.5	6.4	8.9
2012	5.0	5.2	5.0	5.9	8.1
2013	4.9	5.1	4.7	5.6	7.4

Source: U.S. Bureau of Labor Statistics, Local Area Unemployment Statistics

Figure 5.5. Unemployment Rates for Prince William County, Manassas City, and Manassas Park City: 2000 through 2013

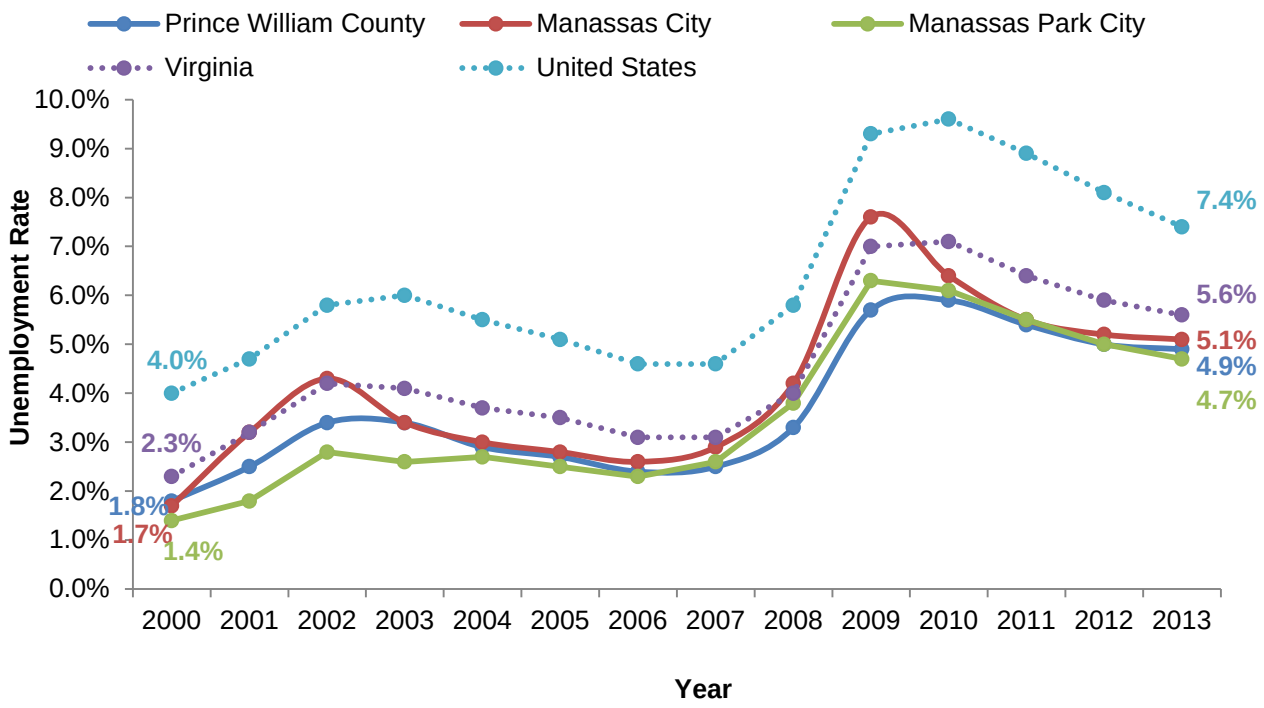


Table 5.16 (next page) and Figure 5.6 (following page) present employment information by industry for Prince William County in 2001, in 2012, and projections for 2021. In 2012, in Prince William County, the industries that accounted for the highest number of jobs were government (23 percent), retail trade (18 percent), and accommodation and food services (10 percent). In 2021, government (21 percent), retail trade (18 percent), and construction (11 percent) are projected to be the industries with the largest number of jobs. By 2021, construction is projected to become the third largest industry with accommodation and food services becoming the fourth largest industry. Between 2012 and 2021, the number of jobs available in Prince William County is expected to grow by 32,316 jobs (29 percent).

Table 5.16. Employment by Industry in Prince William County: 2001, 2012, and 2021

Industry	2001		2012		% Change from 2001 to 2012	2021*		% Change from 2012 to 2021*
	#	%	#	%		#	%	
Accommodation and Food Services	8,332	10.0	11,769	10.4	41.3	15,314	10.5	30.1
Administrative and Support and Waste Management and Remediation Services	4,606	5.5	5,729	5.1	24.4	6,004	4.1	4.8
Agriculture, Forestry, Fishing and Hunting	148	0.2	61	0.1	-58.6	27	<0.1	-56.6
Arts, Entertainment, and Recreation	1,575	1.9	2,249	2.0	42.8	2,637	1.8	17.3
Construction	10,714	12.9	11,232	9.9	4.8	16,556	11.4	47.4
Educational Services (Private)	466	0.6	1,330	1.2	185.7	2,110	1.5	58.6
Finance and Insurance	1,424	1.7	1,735	1.5	21.8	2,171	1.5	25.1
Government	17,885	21.5	25,668	22.7	43.5	30,452	21.0	18.6
Health Care and Social Assistance	5,091	6.1	9,625	8.5	89.1	14,134	9.7	46.8
Information	1,427	1.7	1,333	1.2	-6.6	2,243	1.5	68.3
Management of Companies and Enterprises	598	0.7	659	0.6	10.3	539	0.4	-18.3
Manufacturing	2,596	3.1	2,127	1.9	-18.1	2,230	1.5	4.8
Mining, Quarrying, and Oil and Gas Extraction	52	0.1	89	0.1	72.6	87	0.1	-2.5
Other Services (except Public Administration)	2,760	3.3	3,655	3.2	32.4	4,502	3.1	23.2
Professional, Scientific, and Technical Services	4,366	5.3	8,260	7.3	89.2	11,641	8.0	40.9
Real Estate and Rental and Leasing	1,351	1.6	1,609	1.4	19.1	1,903	1.3	18.3
Retail Trade	15,718	18.9	20,626	18.3	31.2	26,285	18.1	27.4
Transportation and Warehousing	1,555	1.9	1,962	1.7	26.1	2,203	1.5	12.3
Utilities	431	0.5	379	0.3	-12.1	400	0.3	5.5
Wholesale Trade	2,029	2.4	2,808	2.5	38.4	3,783	2.6	34.7
Total	**83,124**	**100.0**	**112,905**	**100.0**	**35.8**	**145,221**	**100.0**	**28.6**

Source: EMSI, Table 2014.2 – QCEW Employees
*EMSI Projections

Figure 5.6. Top 10 Industries in Prince William County by Number of Jobs: 2012

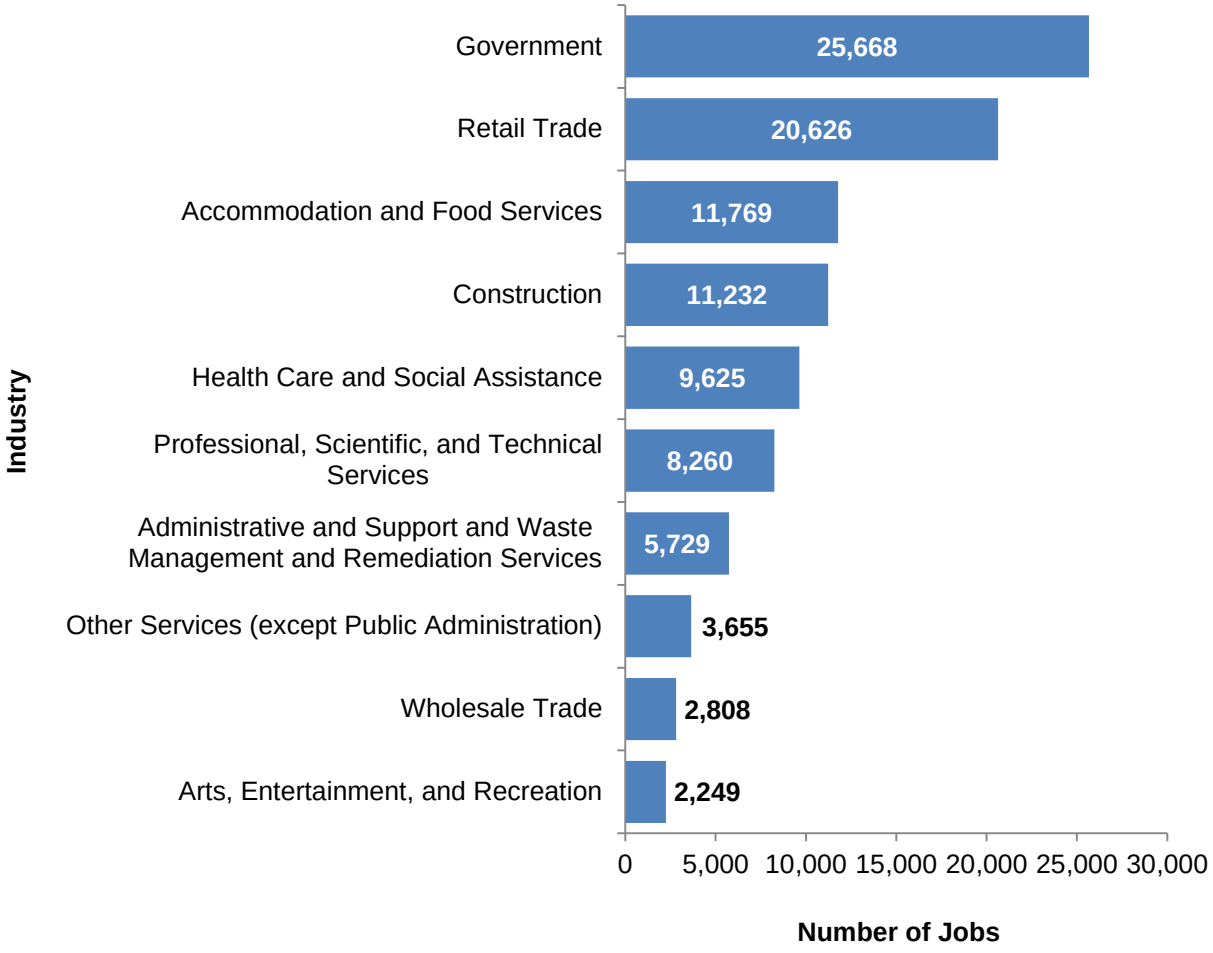


Table 5.17 (next page) and Figure 5.7 (following page) present employment information by industry for Manassas City in 2001, in 2012, and projections for 2021. In Manassas City in 2012, the three largest industries by number of jobs were health care and social assistance (17 percent), followed by professional, scientific and technical services (16 percent), and government (14 percent). Between 2001 and 2012, decreases in total number of jobs were experienced by the following industries: construction; finance and insurance; information, management of companies and enterprises; real estate and rental and leasing; retail trade; transportation and warehousing; and wholesale trade. The largest number of jobs was lost in the retail trade industry, 580 jobs (an 18 percent decrease) causing the industry to go from 17 percent of total jobs in 2001 to 11 percent in 2012. In 2021, professional, scientific and technical services (18 percent) is projected to surpass health care and social assistance (17 percent), and government (13 percent) but the three will remain the largest industries by number of jobs. Between 2012 and 2021, the total number of jobs in Manassas City is projected to grow by 8 percent (1,834 jobs).

Table 5.17. Employment by Industry in Manassas City: 2001, 2012, and 2021

Industry	2001		2012		% Change from 2001 to 2012	2021*		% Change from 2012 to 2021*
	#	%	#	%		#	%	
Accommodation and Food Services	1,539	7.9	1,713	7.1	11.3	1,903	7.3	11.1
Administrative and Support and Waste Management and Remediation Services	865	4.4	1,348	5.6	55.9	2,069	7.9	53.5
Arts, Entertainment, and Recreation	89	0.5	93	0.4	5.3	118	0.5	26.2
Construction	2,085	10.7	1,546	6.4	-25.8	1,618	6.2	4.6
Educational Services (Private)	196	1.0	870	3.6	344.0	1,453	5.6	66.9
Finance and Insurance	425	2.2	367	1.5	-13.7	375	1.4	2.1
Government	1,992	10.2	3,503	14.4	75.8	3,352	12.9	-4.3
Health Care and Social Assistance	3,397	17.5	4,042	16.7	19.0	4,330	16.6	7.1
Information	267	1.4	162	0.7	-39.3	130	0.5	-19.6
Management of Companies and Enterprises	224	1.2	136	0.6	-39.4	155	0.6	13.8
Manufacturing	1,879	9.7	2,326	9.6	23.8	1,510	5.8	-35.1
Mining, Quarrying, and Oil and Gas Extraction	0	0.0	19	0.1	–	<10	<0.1	–
Other Services (except Public Administration)	698	3.6	857	3.5	22.7	1,029	3.9	20.0
Professional, Scientific, and Technical Services	1,162	6.0	3,799	15.7	226.9	4,810	18.4	26.6
Real Estate and Rental and Leasing	299	1.5	255	1.1	-14.8	206	0.8	-19.1
Retail Trade	3,215	16.5	2,635	10.9	-18.0	2,475	9.5	-6.1
Transportation and Warehousing	540	2.8	240	1.0	-55.5	192	0.7	-20.0
Utilities	<10	<0.1	0	0.0	–	0	0.0	0.0
Wholesale Trade	581	3.0	330	1.4	-43.2	342	1.3	3.6
Total	**19,461**	**100.0**	**24,241**	**100.0**	**24.6**	**26,075**	**100.0**	**7.6**

Source: EMSI, Table 2014.2 – QCEW Employees
*EMSI Projections

Figure 5.7. Top 10 Industries in Manassas City by Number of Jobs: 2012

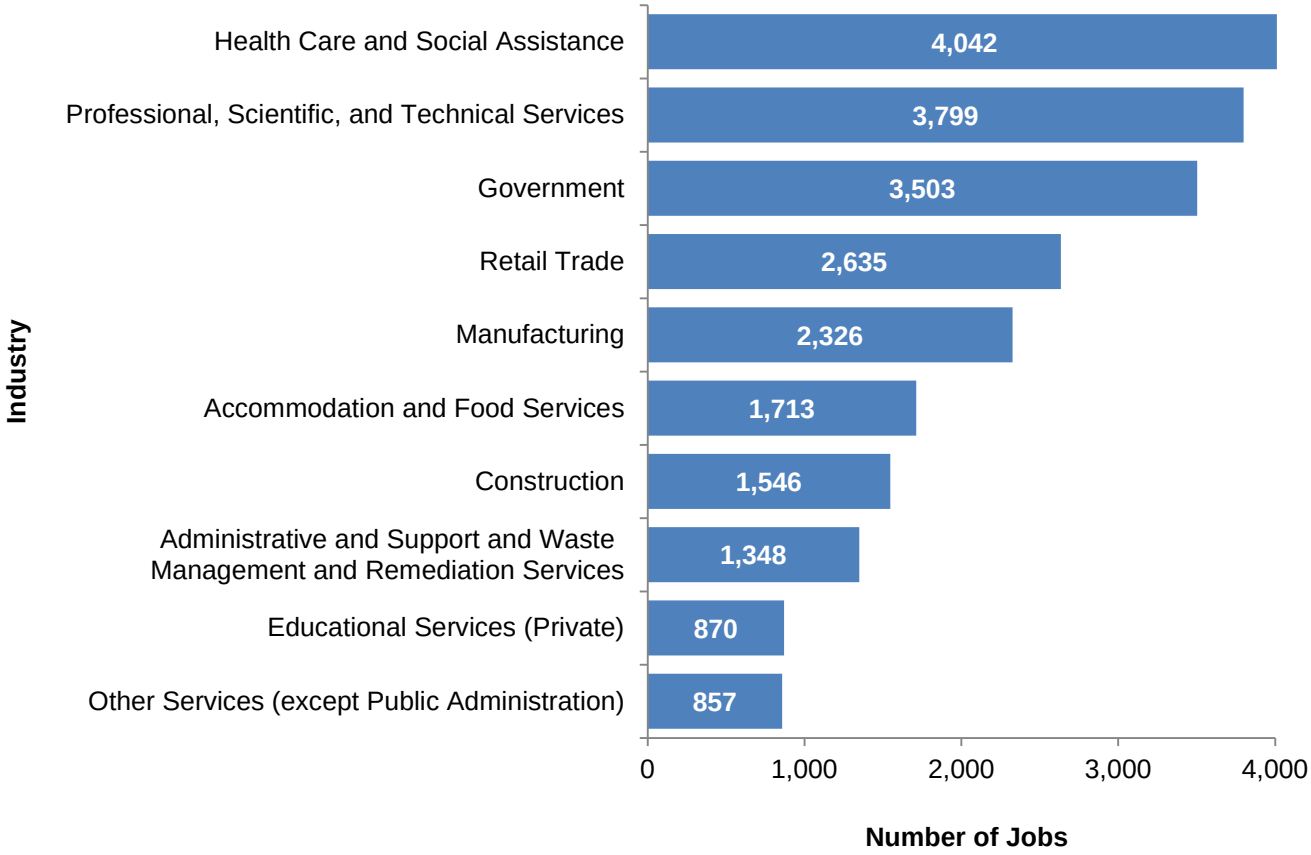


Table 5.18 (next page) and Figure 5.8 (following page) present employment by industry for Manassas Park City in 2001, in 2012, and projections for 2021. In Manassas Park City, the total number of jobs declined by 27 percent (1,072 jobs) from 2001 to 2012. In 2012, the construction and government industries accounted for over 60 percent of total jobs in Manassas Park City (32 and 29 percent, respectively). Four industries experienced positive growth between 2001 and 2012: accommodation and food services (29 percent), government (46 percent), other services except public administration (40 percent), and transportation and warehousing (2 percent). Between 2001 and 2012, construction decreased by 1,034 jobs, going from 49 percent of total jobs to 31 percent, and is projected to account for 25 percent of total jobs in 2021. According to projections, the total number of jobs in Manassas Park City will decrease by 0.4 percent from 2012 to 2021.

Table 5.18. Employment by Industry in Manassas Park City: 2001, 2012, and 2021

Industry	2001		2012		% Change from 2001 to 2012	2021*		% Change from 2012 to 2021*
	#	%	#	%		#	%	
Accommodation and Food Services	69	1.8	89	3.1	29.0	76	2.7	-14.9
Administrative and Support and Waste Management and Remediation Services	279	7.1	130	4.6	-53.5	88	3.1	-32.5
Arts, Entertainment, and Recreation	0	0.0	17	0.6	–	45	1.6	163.5
Construction	1,931	49.3	897	31.5	-53.5	709	25.0	-21.0
Educational Services (Private)	0	0.0	<10	<0.4	–	12	0.4	–
Finance and Insurance	<10	<0.3	11	0.4	–	29	1.0	167.5
Government	553	14.1	807	28.4	46.0	766	27.0	-5.1
Health Care and Social Assistance	<10	<0.3	46	1.6	–	88	3.1	88.5
Information	19	0.5	14	0.5	-23.6	19	0.7	33.4
Management of Companies and Enterprises	0	0.0	<10	<0.4	–	<10	<0.4	–
Manufacturing	262	6.7	136	4.8	-48.2	133	4.7	-1.7
Other Services (except Public Administration)	118	3.0	165	5.8	39.9	224	7.9	35.6
Professional, Scientific, and Technical Services	121	3.1	98	3.5	-18.9	105	3.7	7.2
Real Estate and Rental and Leasing	33	0.8	19	0.7	-41.7	36	1.3	84.3
Retail Trade	311	7.9	208	7.3	-33.1	306	10.8	46.9
Transportation and Warehousing	<10	<0.3	31	1.1	2.4	36	1.3	16.0
Wholesale Trade	204	5.2	168	5.9	-17.6	161	5.7	-4.0
Total	**3,917**	**100.0**	**2,845**	**100.0**	**-27.4**	**2,833**	**100.0**	**-0.4**

Source: EMSI, Table 2014.2 – QCEW Employees
*EMSI Projections

Figure 5.8. Top 10 Industries in Manassas Park City by Number of Jobs: 2012

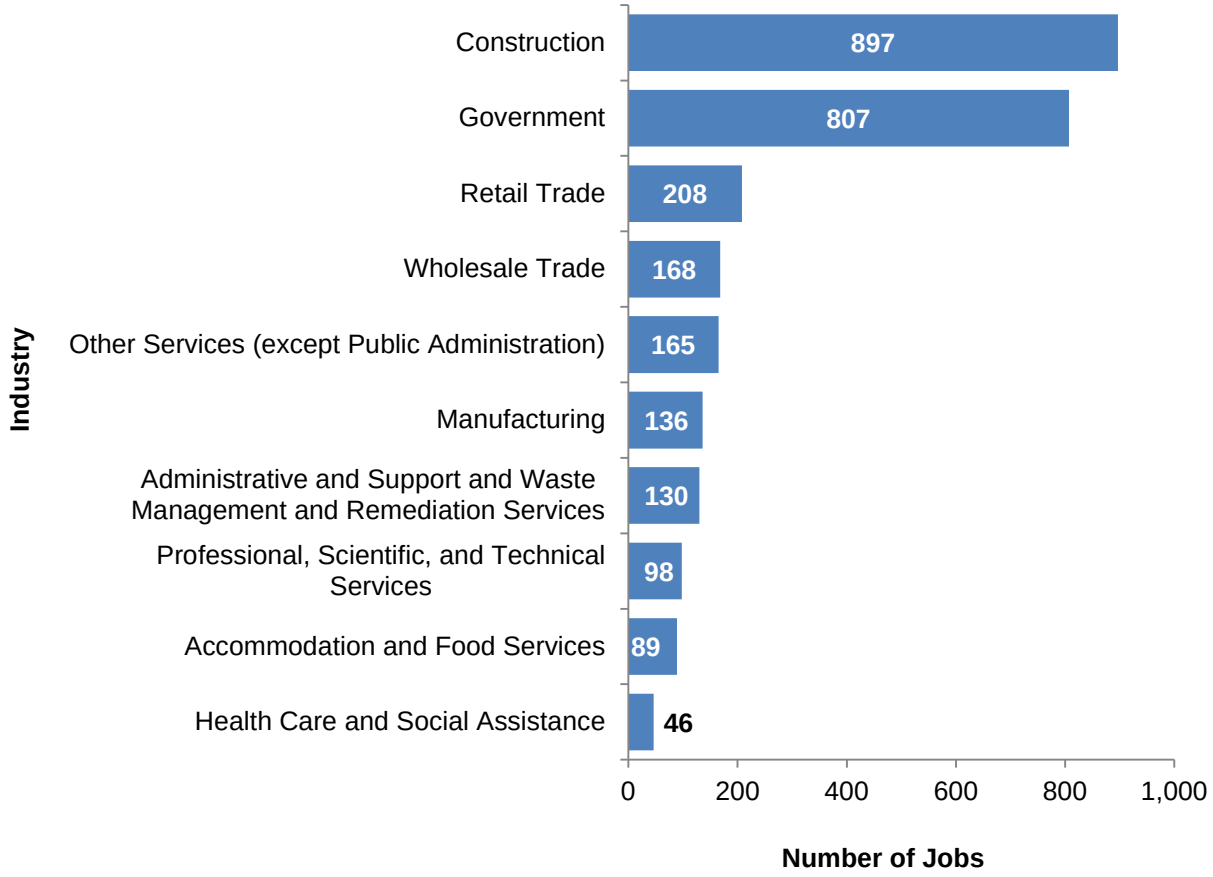


Table 5.19 (next page) and Figure 5.9 (following page) present employment by occupation for Prince William County in 2001, in 2012, and projections for 2021. In Prince William County in 2012, the largest occupations were sales and related (14 percent), office and administrative support (12 percent), and food preparation and serving related (11 percent). From 2001 to 2012, there was growth in the number of jobs in all occupations except for two: farming, fishing, and forestry, and production. Projections indicate that in 2021, sales and related, office and administrative support, and food preparation and serving related will remain the occupations with the largest number of jobs, continuing to account for approximately 37 percent of total jobs in Prince William County.

Table 5.19. Employment by Occupation in Prince William County: 2001, 2012, and 2021

Occupation	2001		2012		% Change from 2001 to 2012	2021*		% Change from 2012 to 2021*
	#	%	#	%		#	%	
Architecture and Engineering	1,213	1.5	1,849	1.6	52.5	2,267	1.6	22.6
Arts, Design, Entertainment, Sports, and Media	1,045	1.3	1,411	1.2	35.0	1,764	1.2	25.0
Building and Grounds Cleaning and Maintenance	3,002	3.6	4,053	3.6	35.0	4,579	3.2	13.0
Business and Financial Operations	4,028	4.8	6,274	5.6	55.7	7,854	5.4	25.2
Community and Social Service	745	0.9	1,185	1.0	59.2	1,667	1.1	40.6
Computer and Mathematical	2,703	3.3	4,685	4.1	73.3	6,340	4.4	35.3
Construction and Extraction	7,608	9.2	7,712	6.8	1.4	11,046	7.6	43.2
Education, Training, and Library	6,788	8.2	10,332	9.2	52.2	13,251	9.1	28.3
Farming, Fishing, and Forestry	151	0.2	100	0.1	-33.6	97	0.1	-3.1
Food Preparation and Serving Related	8,336	10.0	11,853	10.5	42.2	15,460	10.6	30.4
Healthcare Practitioners and Technical	2,417	2.9	4,040	3.6	67.2	5,436	3.7	34.6
Healthcare Support	1,031	1.2	1,959	1.7	90.0	2,971	2.0	51.7
Installation, Maintenance, and Repair	3,382	4.1	4,285	3.8	26.7	5,805	4.0	35.5
Legal	713	0.9	1,239	1.1	73.8	1,432	1.0	15.6
Life, Physical, and Social Science	522	0.6	818	0.7	56.8	975	0.7	19.2
Management	4,245	5.1	5,939	5.3	39.9	7,401	5.1	24.6
Office and Administrative Support	10,583	12.7	13,773	12.2	30.1	17,142	11.8	24.5
Personal Care and Service	2,454	3.0	4,171	3.7	69.9	5,656	3.9	35.6
Production	2,527	3.0	2,511	2.2	-0.7	2,920	2.0	16.3
Protective Service	1,926	2.3	2,685	2.4	39.4	3,614	2.5	34.6
Sales and Related	12,460	15.0	15,982	14.2	28.3	20,326	14.0	27.2
Transportation and Material Moving	5,244	6.3	6,056	5.4	15.5	7,226	5.0	19.3
Total	**83,123**	**100.0**	**112,912**	**100.0**	**35.8**	**145,229**	**100.0**	**28.6**

Source: EMSI, Table 2014.2 – QCEW Employees
*EMSI Projections

Figure 5.9. Top 10 Occupations in Prince William County by Number of Jobs: 2012

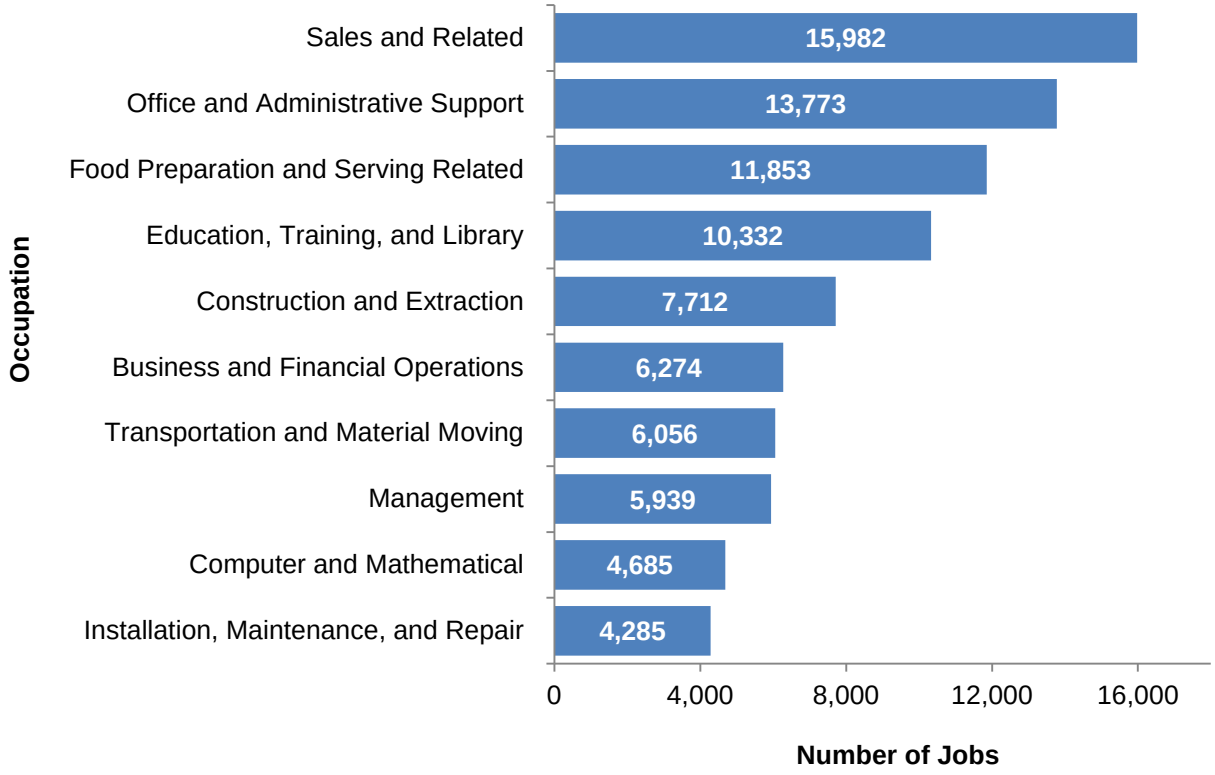


Table 5.20 (next page) and Figure 5.10 (following page) present employment information by occupation for Manassas City in 2001, in 2012, and projections for 2021. In Manassas City in 2012, the top occupations were office and administrative support (12 percent), computer and mathematical (10 percent), and sales and related (9 percent). However, between 2001 and 2012, there was an 18 percent decrease in the number of sales and related jobs. Construction and extraction was the only other occupation category to experience a decrease between 2001 and 2012 (200 jobs). Projections indicate that in 2021, office and administrative support, computer and mathematical, and sales and related will continue to be the occupations with the largest number of jobs available.

Table 5.20. Employment by Occupation in Manassas City: 2001, 2012, and 2021

Occupation	2001		2012		% Change from 2001 to 2012	2021*		% Change from 2012 to 2021*
	#	%	#	%		#	%	
Architecture and Engineering	540	2.8	891	3.7	64.9	867	3.3	-2.7
Arts, Design, Entertainment, Sports, and Media	182	0.9	293	1.2	61.3	352	1.4	20.3
Building and Grounds Cleaning and Maintenance	506	2.6	619	2.6	22.3	769	2.9	24.2
Business and Financial Operations	970	5.0	1,478	6.1	52.4	1,574	6.0	6.5
Community and Social Service	291	1.5	605	2.5	108.1	605	2.3	0.0
Computer and Mathematical	890	4.6	2,470	10.2	177.4	2,771	10.6	12.2
Construction and Extraction	1,359	7.0	1,159	4.8	-14.7	1,219	4.7	5.2
Education, Training, and Library	884	4.5	1,431	5.9	61.9	1,847	7.1	29.1
Farming, Fishing, and Forestry	<10	<0.1	<10	<0.1	–	<10	<0.1	–
Food Preparation and Serving Related	1,598	8.2	1,731	7.1	8.3	1,880	7.2	8.6
Healthcare Practitioners and Technical	1,376	7.1	1,488	6.1	8.1	1,659	6.4	11.5
Healthcare Support	474	2.4	543	2.2	14.6	653	2.5	20.3
Installation, Maintenance, and Repair	800	4.1	867	3.6	8.4	977	3.7	12.7
Legal	200	1.0	336	1.4	67.9	366	1.4	9.1
Life, Physical, and Social Science	72	0.4	135	0.6	88.2	163	0.6	20.3
Management	1,086	5.6	1,541	6.4	41.9	1,615	6.2	4.8
Office and Administrative Support	2,776	14.3	3,005	12.4	8.2	3,122	12.0	3.9
Personal Care and Service	521	2.7	690	2.8	32.5	713	2.7	3.3
Production	979	5.0	1,113	4.6	13.7	982	3.8	-11.8
Protective Service	279	1.4	484	2.0	73.3	412	1.6	-14.8
Sales and Related	2,519	12.9	2,072	8.5	-17.8	2,003	7.7	-3.3
Transportation and Material Moving	1,151	5.9	1,284	5.3	11.5	1,517	5.8	18.2
Total	**19,461**	**100.0**	**24,242**	**100.0**	**24.6**	**26,075**	**100.0**	**7.6**

Source: EMSI, Table 2014.2 – QCEW Employees
*EMSI Projections

Figure 5.10. Top 10 Occupations in Manassas City by Number of Jobs: 2012

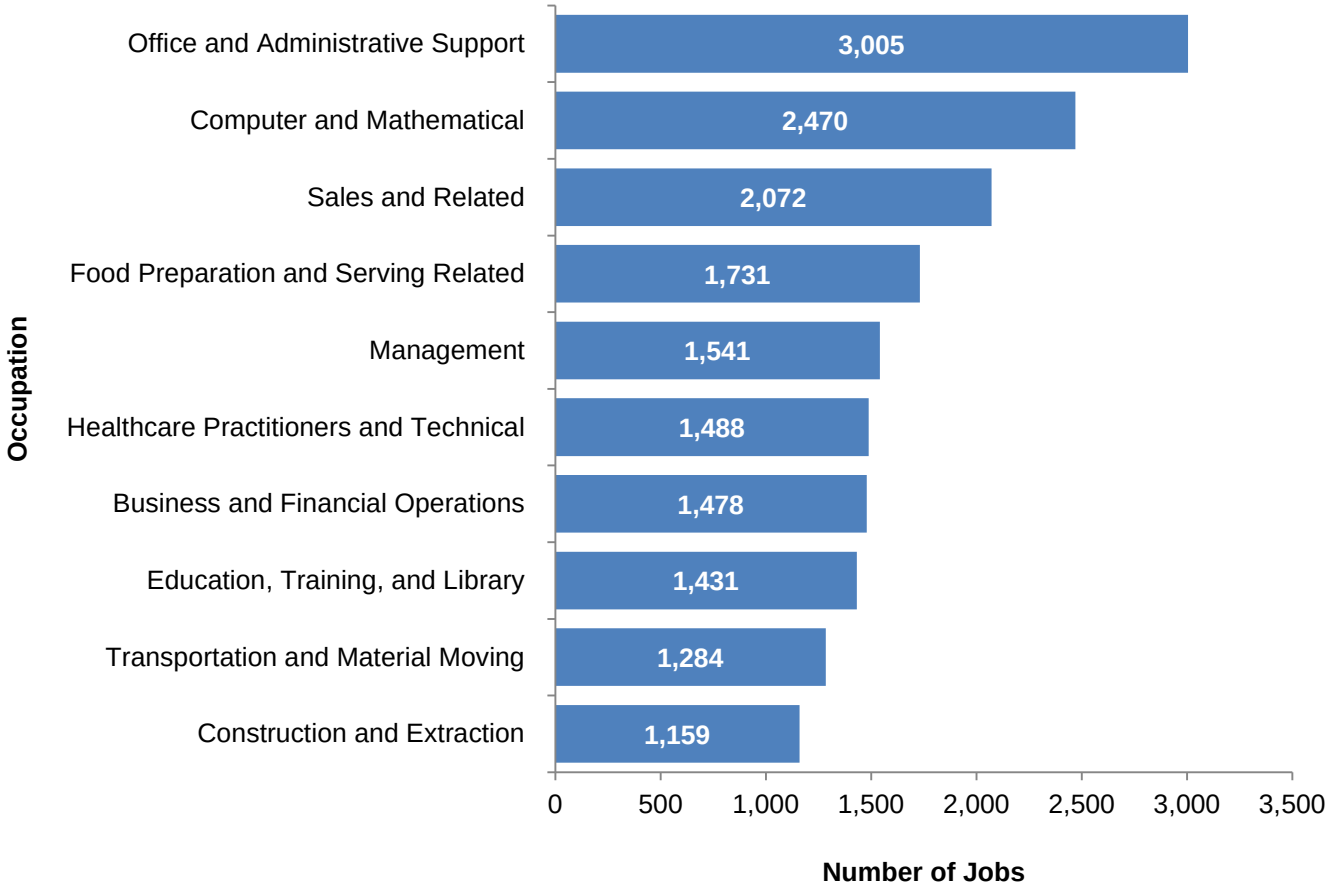


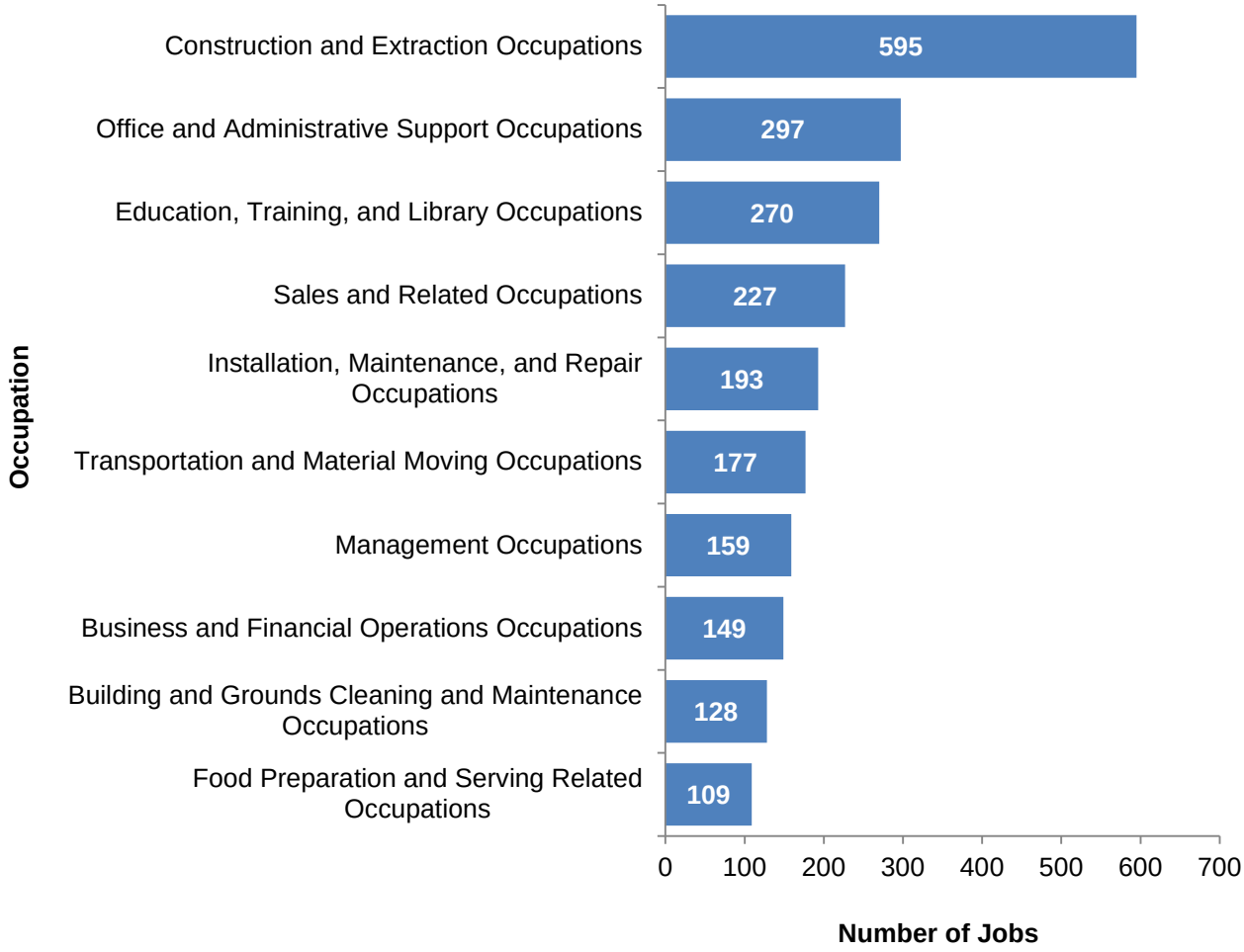
Table 5.21 (next page) and Figure 5.11 (following page) present employment information by occupation for Manassas Park City in 2001, in 2012, and projections for 2021. Between 2001 and 2012, around half of the occupations in Manassas Park City experienced a decline in the number of jobs available. In 2012 in Manassas Park City, the leading occupations by proportion of jobs were construction and extraction (21 percent), office and administrative support (10 percent), and education, training, and library (10 percent). It is projected that by 2021, construction and extraction (16 percent), office and administrative support (11 percent), and sales and related occupations (11 percent) will comprise the largest number of jobs in Manassas Park City with education, training, and library remaining at 10 percent.

Table 5.21. Employment by Occupation in Manassas Park City: 2001, 2012 and 2021

Occupation	2001		2012		% Change from 2001 to 2012	2021*		% Change from 2012 to 2021*
	#	%	#	%		#	%	
Architecture and Engineering	85	2.2	53	1.9	-37.5	44	1.5	-17.9
Arts, Design, Entertainment, Sports, and Media	21	0.5	23	0.8	8.5	24	0.9	7.5
Building and Grounds Cleaning and Maintenance	162	4.1	128	4.5	-20.8	105	3.7	-18.4
Business and Financial Operations	171	4.4	149	5.2	-13.0	152	5.4	1.9
Community and Social Service	34	0.9	55	1.9	64.0	54	1.9	-3.1
Computer and Mathematical	67	1.7	80	2.8	20.2	89	3.2	11.8
Construction and Extraction	1,295	33.0	595	20.9	-54.0	453	16.0	-23.9
Education, Training, and Library	205	5.2	270	9.5	32.2	277	9.8	2.5
Farming, Fishing, and Forestry	<10	<0.3	<10	<0.4	–	<10	<0.4	–
Food Preparation and Serving Related	83	2.1	109	3.8	31.2	106	3.7	-3.0
Healthcare Practitioners and Technical	26	0.7	28	1.0	9.6	33	1.2	17.1
Healthcare Support	<10	<0.3	10	0.4	–	18	0.6	76.7
Installation, Maintenance, and Repair	321	8.2	193	6.8	-40.0	216	7.6	12.1
Legal	18	0.5	29	1.0	61.4	28	1.0	-3.4
Life, Physical, and Social Science	15	0.4	17	0.6	9.4	16	0.6	-4.4
Management	225	5.8	159	5.6	-29.3	156	5.5	-2.1
Office and Administrative Support	427	10.9	297	10.4	-30.5	308	10.9	3.6
Personal Care and Service	13	0.3	59	2.1	367.9	86	3.0	45.8
Production	197	5.0	101	3.6	-48.5	106	3.7	4.5
Protective Service	49	1.2	81	2.9	66.9	75	2.7	-7.3
Sales and Related	278	7.1	227	8.0	-18.4	297	10.5	31.1
Transportation and Material Moving	218	5.6	177	6.2	-18.7	187	6.6	5.4
Total	**3,917**	**100.0**	**2,845**	**100.0**	**-27.4**	**2,833**	**100.0**	**-0.4**

Source: EMSI, Table 2014.2 – QCEW Employees
*EMSI Projections

Figure 5.11. Top 10 Occupations in Manassas Park City by Number of Jobs: 2012



IV. Employer Profile

Table 5.22 (next page) displays the top employers in Prince William County, Manassas City, and Manassas Park City in 2014, along with the estimated number of employees for each and a brief description of each type of business. There is considerable diversity in the type of businesses in the region. The top five companies each employed from 1,000 to 1,499 people: Micron Technology Virginia (semiconductors), Lockheed Martin Corporation (system engineering/defense contacting), Potomac Hospital (health care), Prince William Hospital (health care), and S.W. Rogers (construction).

Table 5.22. Top Employers in Prince William County, Manassas City, and Manassas Park City: 2014

Employers	Estimated Number of Employees	Type of Business
Micron Technology Virginia	1,000-1,499	Semiconductors
Lockheed Martin Corporation	1,000-1,499	Systems engineering/ Defense contracting
Potomac Hospital	1,000-1,499	Health care
Prince William Hospital	1,000-1,499	Health care
S.W. Rogers	1,000-1,499	Construction
Northern Virginia Community College	600-999	Higher education
Aerojet-General Corporation	300-599	Rocket motors
Deck America	300-599	Custom decks and sunrooms
Alliant/Atlantic Food Service	300-599	Food distribution
Colgan Air	300-599	Air transportation services
Comcast	300-599	Telecommunications
General Dynamics Land Systems	300-599	R&D/combat vehicles
Minnieland Private Day School, Inc.	300-599	Child development
Northern Virginia Electric Cooperative	300-599	Electric utility
U.S. Foodservice, Inc.	300-599	Food distribution
Verizon Communications	300-599	Telecommunications
Wm. T. Hazel Co.	300-599	Land development
Arban and Corosi Inc.	100-299	Construction materials
BAE Systems	100-299	Aerospace electronic systems

Source: Virginia Economic Development Partnership (VEDP) Community Profiles, Prince William County/Manassas City/Manassas Park City

V. Federal Government Procurement

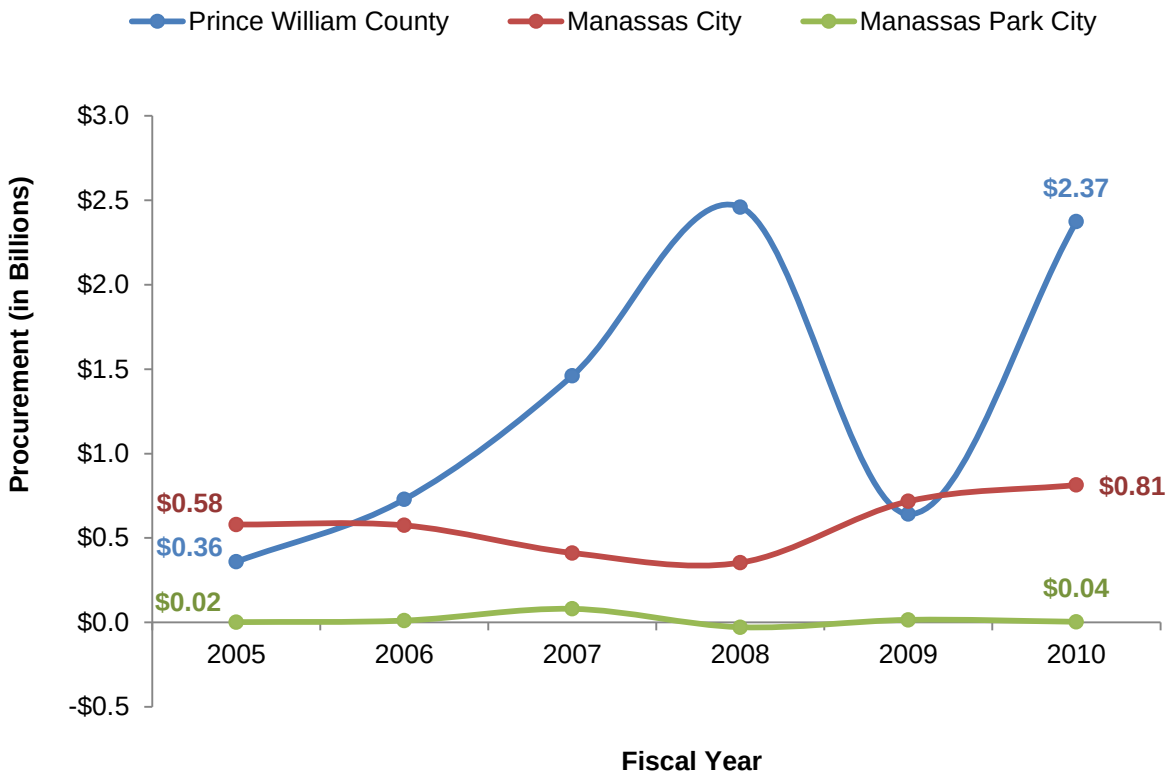
Table 5.23 and Figure 5.12 (both next page) present data on federal government procurement for firms located in Prince William County, Manassas City, and Manassas Park City for fiscal years 2005 through 2010. Total federal government procurement for firms located in Prince William County increased by 561 percent from 2005 to 2010, while procurement in Manassas City and Manassas Park City increased by 40 percent and 129 percent, respectively.

Table 5.23. Federal Government Procurement in Prince William County, Manassas City, and Manassas Park City: Fiscal Years 2005 through 2010 (in U.S. Dollars)

Jurisdiction	Year						% Change 2005 to 2010
	2005	2006	2007	2008	2009	2010	
Prince William County	359,110,000	728,478,000	1,461,092,000	2,460,174,000	641,166,000	2,373,521,000	560.9
Manassas City	579,733,000	574,521,000	411,235,000	353,838,000	717,001,000	813,780,000	40.4
Manassas Park City	1,618,000	10,794,000	80,174,000	-28,382,000	15,120,000	3,710,000	129.3

Source: U.S. Census Bureau, Consolidated Federal Funds Report (CFFR) 2005 to 2010
Federal Financial Statistics program was terminated in 2012; therefore, the CFFR 2010 is the most recent available report
Amounts are not adjusted for inflation

Figure 5.12. Federal Government Procurement in Prince William County, Manassas City, and Manassas Park City: Fiscal Years 2005 through 2010 (in Billions of U.S. Dollars)



VI. Income

Table 5.24 presents the annual per capita income of Prince William County, Manassas City, and Manassas Park City residents in 1999 and 2012. Figures for 1999 have been converted to 2012 constant U.S. dollars to adjust for inflation. Between 1999 and 2012, the annual per capita personal income level for Prince William County residents increased by 10 percent from $33,681 to $37,157. During this same time period, the annual per capita income level in Manassas City decreased by 11 percent and the per capital income level in Manassas Park City decreased by 1 percent (Table 5.25). Figure 5.13 (next page) displays the percent change in annual per capita income as well as percent change in median annual household income from 1999 to 2012.

Table 5.24. Annual Per Capita Income for Prince William County, Manassas City, and Manassas Park City Residents: 1999 and 2012

Jurisdiction	Per Capita Income ($)		% Change from 1999 to 2012
	1999*	2012	
Prince William County	33,681	37,157	10.3
Manassas City	32,120	28,632	-10.9
Manassas Park City	27,648	27,306	-1.2

Sources: U.S. Census Bureau, Census 2000, Table DP-3; U.S. Census Bureau, 2012 American Community Survey, Table DP03
*U.S. Dollars for 1999 were converted to 2012 constant U.S. Dollars using the BEA Implicit Price Deflator

Table 5.25 presents the median annual household income for Prince William County, Manassas City, and Manassas Park City residents in 1999 and 2012. Figures for 1999 have been converted to 2012 constant U.S. dollars to adjust for inflation. Between 1999 and 2012, the median annual household income level for Prince William County residents increased by 11 percent. Conversely, the median annual household income level for Manassas City residents decreased by 11 percent. The median annual household income for Manassas Park City residents also declined by 10 percent. Figure 5.13 (next page) displays the percent change in annual per capita income (as presented in Table 5.24) as well as percent change in median annual household income from 1999 to 2012.

Table 5.25. Median Annual Household Income for Prince William County, Manassas City, and Manassas Park City Residents: 1999 and 2012

Jurisdiction	Median Annual Household Income ($)		% Change from 1999 to 2012
	1999*	2012	
Prince William County	86,642	96,160	11.0
Manassas City	79,350	70,634	-11.0
Manassas Park City	79,856	71,810	-10.1

Sources: U.S. Census Bureau, Census 2000, Table DP-3; U.S. Census Bureau, 2012 American Community Survey, Table DP03
*U.S. Dollars for 1999 were converted to 2012 constant U.S. Dollars using the BEA Implicit Price Deflator

Figure 5.13. Annual Per Capita Income and Median Household Income for Prince William County, Manassas City, and Manassas Park City Residents: Percent Change from 1999 to 2012

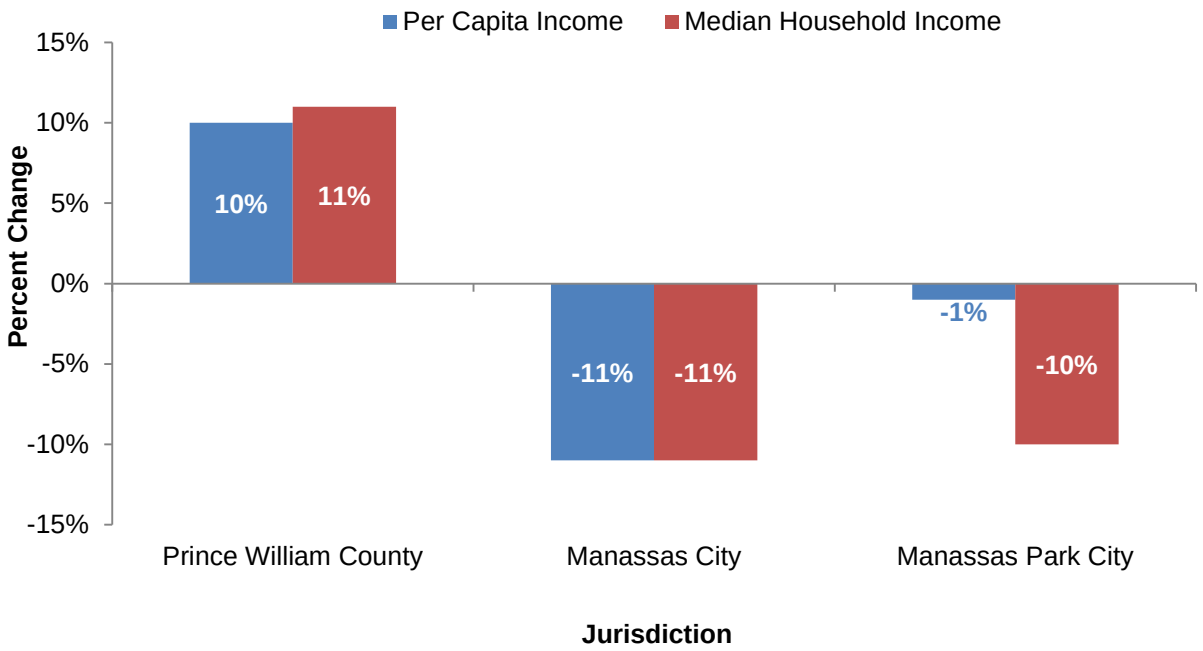


Table 5.26 and Figure 5.14 (both next page) present the 2012 distribution of annual household income levels for Prince William County, Manassas City, and Manassas Park City residents. In 2012, the largest proportion of Prince William County households reported an income level from $100,000 to $149,999 (22 percent), followed by residents with income levels from $50,000 to $74,999 (16 percent). Just under half of all Prince William County households reported an income level greater than $100,000 (48 percent). Around 8 percent of Prince William County households reported an income level less than $25,000.

In 2012, the largest proportion of Manassas City households reported an income level from $50,000 to $74,999 (22 percent), followed by households with income levels from $100,000 to $149,999 (20 percent). About one-third of Manassas City households reported an income level greater than $100,000, while about 13 percent of Manassas City households reported an income level of less than $25,000.

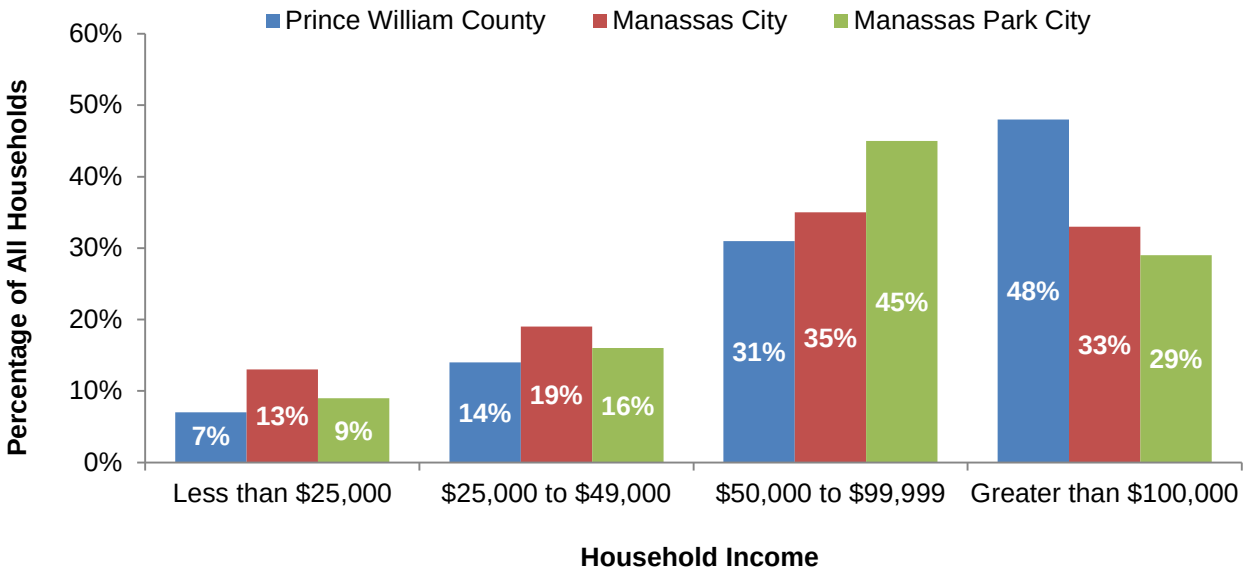
In 2012, the largest proportion of Manassas Park City households (27 percent) reported an income level from $50,000 to $74,999, followed by residents with income levels from $75,000 to $99,999 (19 percent). Nearly 30 percent of Manassas Park City households reported an income level greater than $100,000, while less than 10 percent of Manassas Park City households reported an income level less than $25,000.

Table 5.26. Annual Household Income Distribution for Prince William County, Manassas City, and Manassas Park City Residents: 2012

Household Income and Benefits	Prince William County		Manassas City		Manassas Park City	
	#	%	#	%	#	%
Less than $10,000	2,964	2.3	585	4.9	60	1.4
$10,000 to $14,999	1,781	1.4	222	1.8	220	5.1
$15,000 to $24,999	4,962	3.8	729	6.1	126	2.9
$25,000 to $34,999	6,408	4.9	978	8.1	253	5.9
$35,000 to $49,999	11,279	8.7	1,362	11.3	426	10
$50,000 to $74,999	20,662	15.9	2,627	21.9	1,136	26.6
$75,000 to $99,999	19,683	15.2	1,600	13.3	807	18.9
$100,000 to $149,999	29,088	22.4	2,367	19.7	732	17.1
$150,000 to $199,999	17,103	13.2	860	7.2	308	7.2
Greater than $200,000	15,713	12.1	681	5.7	209	4.9
Total Households	**129,643**	**100.0**	**12,011**	**100.0**	**4,277**	**100.0**

Source: U.S. Census Bureau, 2012 American Community Survey, Table DP03

Figure 5.14. Annual Household Income Distribution for Prince William County, Manassas City, and Manassas Park City Residents: 2012



VII. Real Estate

The number and median price of housing units sold in Prince William County, Manassas City, and Manassas Park City between 2000 and 2013 are presented in Table 5.27 and Figures 5.15, 5.16, and 5.17 (following pages). From 2000 to 2005, the annual number of housing units sold in Prince William County increased by over 80 percent, then dropped sharply by 2007 (143

percent). In 2013, the number of housing units sold in Prince William County was relatively similar to the number sold in 2000 (1 percent increase).

The annual number of housing units sold in Manassas City and Manassas Park City over the last 14 years follows a very similar trend to the annual number of housing units sold in Prince William County during that same time. There was a spike in the annual number of housing units sold between 2000 and 2005. Manassas City experienced an increase of over 65 percent and Manassas Park City experienced an increase of 86 percent. This increase was followed by a sharp decline between 2005 and 2007 (a decrease of over 60 percent for both regions). This was the lowest point over the period examined for both regions. In 2013, the number of housing units sold in Manassas City and Manassas Park City were below the numbers sold in 2000 (19 and 21 percent, respectively).

All historical median prices for housing units sold in these regions have been converted to constant 2013 U.S. dollars to adjust for inflation. The median price of housing units sold in Prince William County increased by almost 140 percent from 2000 to 2005. The median price of housing units sold in Prince William County increased by over 76 percent from 2000 to 2013.

The historical median price of housing units sold in Manassas City and Manassas Park City over the last 14 years follows a very similar trend to the historical median price of housing units sold in Prince William County during that same time. The median price of housing units sold increased sharply from 2000 to 2005/2006 (a nearly 185 percent increase for Manassas City and a nearly 165 percent increase for Manassas Park City), then hit a downward trend that bottomed out around 2009 (a 70 percent decrease for Manassas City and a 60 percent decrease for Manassas Park City), before returning to an increasing trend in 2013. The median price of housing units sold in Manassas City increased by 63 percent from 2000 to 2013. The median price of housing units sold in Manassas Park City increased by 82 percent 2000 to 2013.

Table 5.27. Number and Median Price of Housing Units Sold in Prince William County, Manassas City, and Manassas Park City: 2000 through 2013

Year	Prince William County		Manassas City		Manassas Park City	
	# of Units Sold	Median Price ($)*	# of Units Sold	Median Price ($)*	# of Units Sold	Median Price ($)*
2000	6,175	190,159	717	159,987	258	159,009
2001	7,654	214,381	887	176,410	271	188,579
2002	8,840	250,852	969	212,954	321	220,860
2003	9,599	294,656	993	262,637	338	245,444
2004	10,993	359,241	1,142	299,368	434	329,305
2005	11,301	455,110	1,189	455,110	480	407,249
2006	6,550	450,264	710	416,382	266	420,998
2007	4,642	418,883	432	343,769	148	349,197
2008	8,398	272,113	1,091	166,710	507	178,003
2009	7,862	230,543	860	135,551	435	162,234
2010	6,192	281,666	604	210,891	264	203,510
2011	5,895	281,010	445	210,757	215	165,300
2012	5,798	294,321	461	223,380	216	225,815
2013	6,256	335,000	578	260,000	203	290,000
% Change from 2000 to 2013	**1.3**	**76.2**	**-19.4**	**62.5**	**-21.3**	**82.4**

Source: Real Estate Business Intelligence
*All median prices of housing units have been converted to constant 2013 U.S. Dollars using BEA Implicit Price Deflator; median prices are from June of the specified year.

Figure 5.15. Number of Housing Units Sold in Prince William County: 2000 through 2013

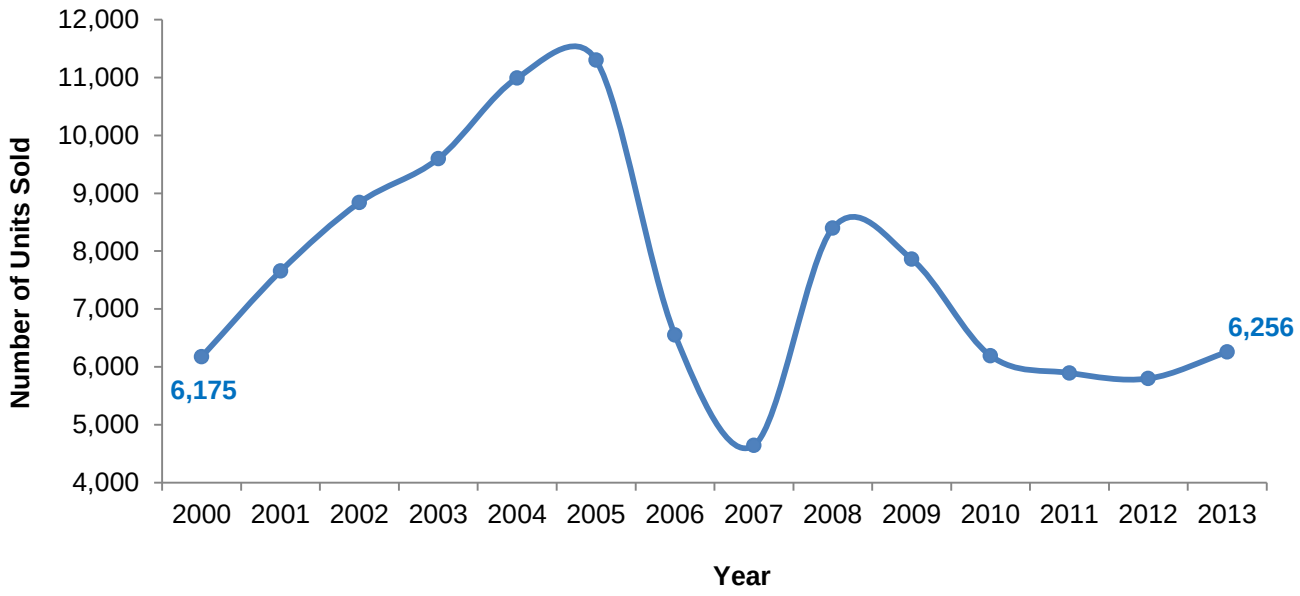


Figure 5.16. Number of Housing Units Sold in Manassas City and Manassas Park City: 2000 through 2013

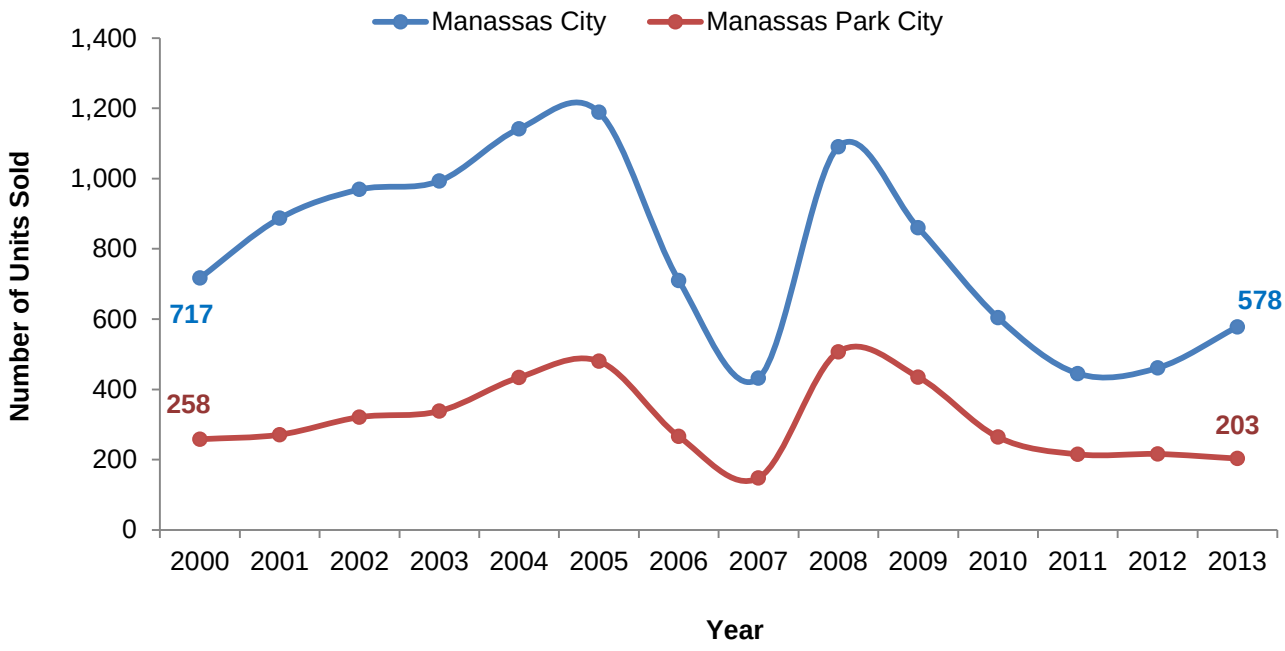


Figure 5.17. Median Price of Housing Units Sold in Prince William County, Manassas City, and Manassas Park City: 2000 through 2013

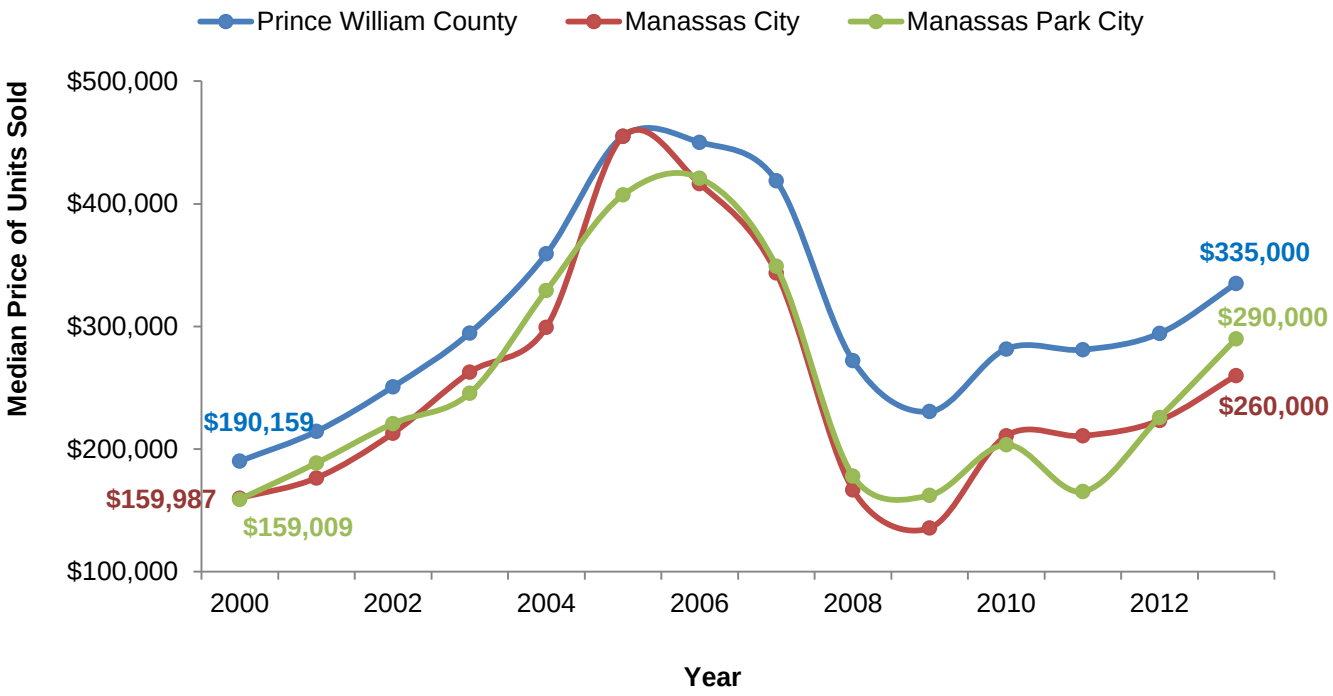


Table 5.28 presents data on office, flex, and industrial vacancy rates for Prince William County in 2013 and 2014. Vacancy rate data are not available for Manassas City and Manassas Park City. From 2013 to 2014, the office vacancy rate in Prince William County increased by less than half of one percentage point, the flex space vacancy rate decreased by 4 percentage points, and the industrial vacancy rate decreased by almost 1 percentage point. The total office/flex/industrial vacancy rate for Prince William County increased by less than half of one percentage point from 2013 to 2014.

Table 5.28. Office, Flex, and Industrial Vacancy Rates for Prince William County: 2013 and 2014

Year	Vacancy Rate (%)			
	Office	Flex	Industrial	Total
2013	12.1	19.2	8.1	8.1
2014	12.4	15.2	7.3	8.4

Source: Prince William County Reports

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Appendix

Data Sources

The College Board. The College Board is a non-profit organization that links students to college success and opportunity. https://www.collegeboard.org/

CoStar. CoStar produces building-specific information through a proprietary database of commercial transactions. www.costar.com/

Delta Associates. Delta Associates produces commercial real estate research, advisory, and publication services. https://www.deltaassociates.com/

Economic Modeling Specialists, Intl. (EMSI). EMSI converts labor market data into information for organizations to analyze. http://www.economicmodeling.com/

Loudoun Government Document Center. http://www.loudoun.gov/DocumentCenter

United States Bureau of Labor and Statistics (BLS). BLS is part of the U.S. Department of Labor and is the principle federal agency which measures labor market activity, working conditions, and price changes in the economy. http://www.bls.gov/

United States Census Bureau. The U.S. Census Bureau serves as the leading source of data on the nation's people and economy. http://www.census.gov/

Virginia Community College System (VCCS). VCCS was established in 1966 to create a comprehensive system for Virginia's community colleges. http://www.vccs.edu/

Virginia Economic Development Partnership (VEDP). Community Profiles. VEDP provides site selection and business expansion services in Virginia. http://www.yesvirginia.org/

Virginia Employment Commission (VEC). VEC provides information about job opportunities, unemployment insurance, and the labor market in the Commonwealth of Virginia. http://www.vec.virginia.gov/

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