Fairfax County: Five Major Forces Shaping Its Economic Evolution

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The Washington Metropolitan Area from The International Space Station, January 20, 2013
1. The Region’s geography, geology and historic development pattern
Population and Federal Employment Growth In the Washington Area, 1800-2000

<table>
<thead>
<tr>
<th>Years</th>
<th>Population DC</th>
<th>Population Metro Area</th>
<th>Federal Employees</th>
</tr>
</thead>
<tbody>
<tr>
<td>1800</td>
<td>8,144</td>
<td>63,653*</td>
<td>131**</td>
</tr>
<tr>
<td>1860</td>
<td>75,080</td>
<td>141,215*</td>
<td>2,199**</td>
</tr>
<tr>
<td>1870</td>
<td>131,700</td>
<td>203,108*</td>
<td>6,222**</td>
</tr>
<tr>
<td>1900</td>
<td>278,718</td>
<td>378,605*</td>
<td>20,834**</td>
</tr>
<tr>
<td>1930</td>
<td>486,869</td>
<td>672,198</td>
<td>68,510**</td>
</tr>
<tr>
<td>1940</td>
<td>663,091</td>
<td>967,985</td>
<td>133,645**</td>
</tr>
<tr>
<td>1950</td>
<td>802,178</td>
<td>1,452,349</td>
<td>214,077**</td>
</tr>
<tr>
<td>1980</td>
<td>638,333</td>
<td>3,426,648</td>
<td>364,697</td>
</tr>
<tr>
<td>1990</td>
<td>606,900</td>
<td>4,157,327</td>
<td>368,120</td>
</tr>
<tr>
<td>2000</td>
<td>572,059</td>
<td>4,837,428</td>
<td>326,008</td>
</tr>
<tr>
<td>2010</td>
<td>601,723</td>
<td>5,636,232</td>
<td>380,268</td>
</tr>
<tr>
<td>2015</td>
<td>672,228</td>
<td>6,097,684</td>
<td>363,952</td>
</tr>
</tbody>
</table>

Source: Census Bureau, Bureau of Labor Statistics QCEW, The Stephen S. Fuller Institute at the Schar School, GMU
* DC, Alexandria, Arlington, Fairfax, Montgomery, Prince George's  ** DC only
Population Growth by Decade Washington MSA

1900 - 2010

Thousands

Source: Census Bureau, The Stephen S. Fuller Institute at the Schar School, GMU

Population in the Washington MSA
By Sub-State Area, 1900 - 2010

Thousands

Source: Census Bureau, The Stephen S. Fuller Institute at the Schar School, GMU
Growth in Jobs, 1980 - 2016

Sources: Bureau of Labor Statistics, The Stephen S. Fuller Institute at the Schar School, GMU

(000s)

DC: +130.3
Suburban Maryland: +400.6
Northern Virginia: +858.1

Sources: Bureau of Labor Statistics, The Stephen S. Fuller Institute at the Schar School, GMU
2. Growth of the Washington Region as the “Capital of the Free World”
Federal Procurement in the Washington Region, 1980-2016

$1,305.1 Billion

3. Suburbanization and Changes in Where People Live and Work
Population in Fairfax County*
1900 - 2016

1900 to 2016: +6,233.9%

Population in Fairfax County*
1900 - 2016

Source: Census Bureau Decennial Census (Forstall, 1995), 2016 Population Estimates, The Stephen S. Fuller Institute at the Schar School, GMU
* Including Fairfax City and Falls Church City

Jobs in Fairfax County*, 1970 - 2015

Source: Bureau of Economic Analysis, The Stephen S. Fuller Institute at the Schar School, GMU
* Including Fairfax City and Falls Church City
Share of Washington Region Jobs in Fairfax County*, 1970 - 2015

Source: Bureau of Economic Analysis, The Stephen S. Fuller Institute at the Schar School, GMU
* Including Fairfax City and Falls Church City

Cumulative Job Growth
Fairfax County* and the Washington Region, 1970 - 2015

Source: Bureau of Economic Analysis, The Stephen S. Fuller Institute at the Schar School, GMU
* Including Fairfax City and Falls Church City
Home Location of Workers Who Work in Fairfax County, 2002

Job Count
- 10,706 - 12,489
- 8,922 - 10,705
- 7,138 - 8,921
- 5,354 - 7,137
- 3,570 - 5,353
- 1,786 - 3,569
- 1 - 1,785

* Including Fairfax City and Falls Church City

Home Location of Workers Who Work in Fairfax County, 2014

Job Count
- 11,360 - 13,253
- 9,467 - 11,359
- 7,574 - 9,466
- 5,681 - 7,573
- 3,788 - 5,680
- 1,895 - 3,787
- 1 - 1,894

* Including Fairfax City and Falls Church City
4. The Changing Structure of the Washington Region’s economy

Changing Job Patterns
Washington Metro Area, 1950 – 2010
(Percent of Total)

Source: The Stephen S. Fuller Institute at the Schar School, GMU
### Employed Residents in Fairfax* County, 1930 - 2016

<table>
<thead>
<tr>
<th></th>
<th>Employed Residents</th>
<th>1930 – 2016 Change</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>1930</td>
<td>1940</td>
</tr>
<tr>
<td>Farm**</td>
<td>2,704</td>
<td>2,015</td>
</tr>
<tr>
<td>Non-Farm**</td>
<td>7,049</td>
<td>12,224</td>
</tr>
<tr>
<td>Total</td>
<td>9,753</td>
<td>14,239</td>
</tr>
<tr>
<td>Farm as % of Total</td>
<td>27.7%</td>
<td>14.2%</td>
</tr>
</tbody>
</table>

Source: Census Bureau Decennial Census, The Stephen S. Fuller Institute at the Schar School, GMU  
* Including Fairfax City and Falls Church City  
** Farm includes Agriculture, Natural Resources and Fishing

### Residents Per At-Place Job  
Fairfax County* 1975 - 2020

![Residents Per At-Place Job Chart]

Source: The Stephen S. Fuller Institute at the Schar School, GMU  
* Including Fairfax City and Falls Church City
5. Globalization, Technology, and the Rise of the Knowledge-Based Economy
### The Washington Region’s Advanced Industrial Clusters

#### Job Growth Forecast

<table>
<thead>
<tr>
<th>Clusters</th>
<th>2014-2025 Job Forecast</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Low</td>
</tr>
<tr>
<td>Advocacy Services</td>
<td>122,303</td>
</tr>
<tr>
<td>Info &amp; Comm. Tech</td>
<td>213,621</td>
</tr>
<tr>
<td>Sci &amp; Security Tech</td>
<td>135,707</td>
</tr>
<tr>
<td>Bio &amp; Health Tech</td>
<td>58,388</td>
</tr>
<tr>
<td>Business &amp; Fin. Serv.</td>
<td>218,851</td>
</tr>
<tr>
<td>Media &amp; Info Services</td>
<td>36,292</td>
</tr>
<tr>
<td>Business &amp; Leisure T.</td>
<td>87,807</td>
</tr>
<tr>
<td><strong>All Clusters</strong></td>
<td><strong>872,969</strong></td>
</tr>
<tr>
<td><strong>All Jobs in WMA</strong></td>
<td><strong>3,092,270¹</strong></td>
</tr>
</tbody>
</table>

Source: Inforum, University of Maryland, December 2015

¹Reflects narrower definition used in QCEW jobs data
Tech-Oriented Employment as Share of Total Employment

- **Washington Region**
  - 1995: 8.2%
  - 2016: 12.3%

- **Fairfax County**
  - 1995: 13.0%
  - 2016: 22.2%

Source: Quarterly Census of Earnings and Wages, The Stephen S. Fuller Institute at the Schar School, GMU

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Employment Growth in Fairfax as Percent of Region 1995 - 2016

- **All Jobs**
  - 1995: 23.9%

- **Tech-Oriented Jobs**
  - 1995: 44.7%

Sources: Quarterly Census of Earnings and Wages, The Stephen S. Fuller Institute at the Schar School, GMU
The Changing Structure of the Washington Region Economy

2010

- Local Serving Activities 34.8%
- Non-Local Serving Business 12.0%
- Fed Wages & Salaries 10.0%
- Other Federal 10.7%
- Procurement 19.1%
- Total Federal 39.8%

2021

- Local Serving Activities 38.3%
- Non-Local Serving Business 19.1%
- Fed Wages & Salaries 10.0%
- Other Federal 7.7%
- Procurement 12.8%
- Total Federal 27.2%

Source: The Stephen S. Fuller Institute at the Schar School, GMU; Forecast January 2017

Thank You & Questions

For monthly reports on the Washington region’s economic performance go to:

sfullerinstitute.gmu.edu