



# *Fairfax County: Five Major Forces Shaping Its Economic Evolution*

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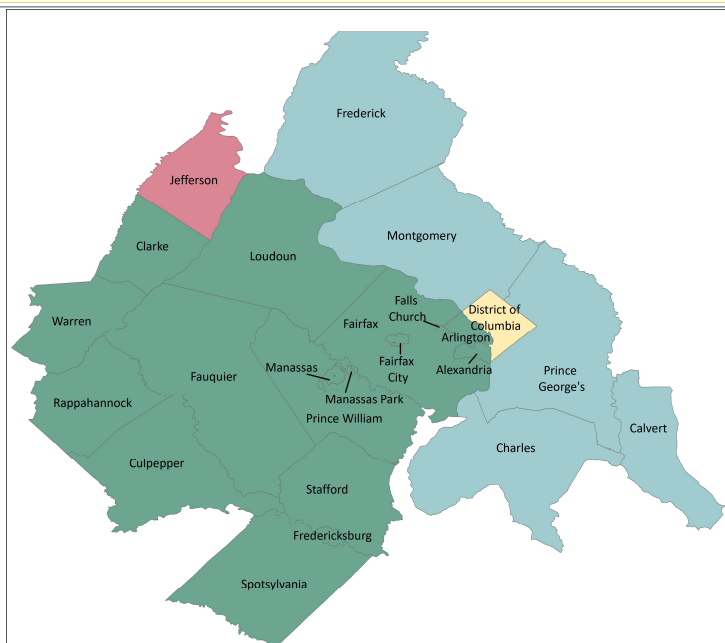


September 20, 2017

## The Washington Metropolitan Area from The International Space Station, January 20, 2013



# 1. The Region's geography, geology and historic development pattern



Washington  
Region





## Population and Federal Employment Growth In the Washington Area, 1800-2000

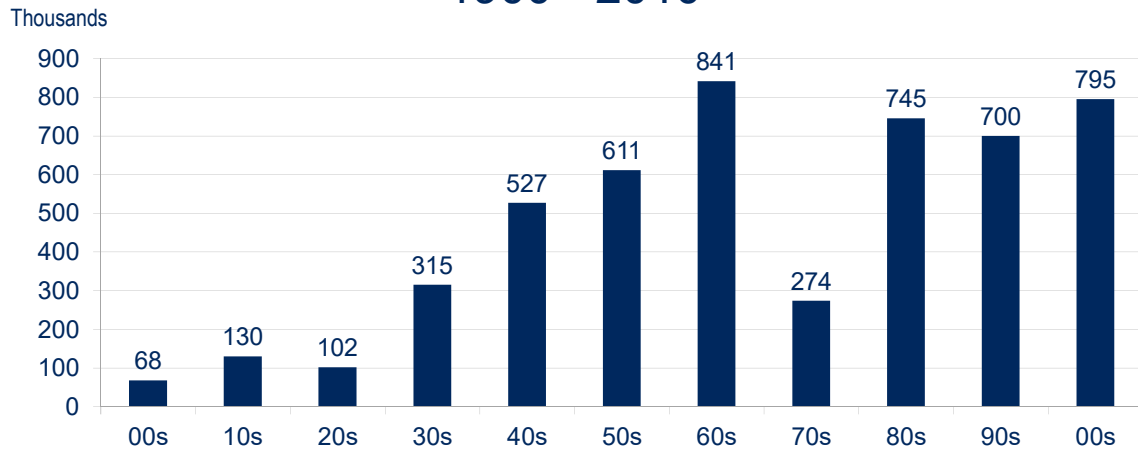
Years	Population		Federal Employees
	DC	Metro Area	
1800	8,144	63,653*	131**
1860	75,080	141,215*	2,199**
1870	131,700	203,108*	6,222**
1900	278,718	378,605*	20,834**
1930	486,869	672,198	68,510**
1940	663,091	967,985	133,645**
1950	802,178	1,452,349	214,077**
1980	638,333	3,426,648	364,697
1990	606,900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

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

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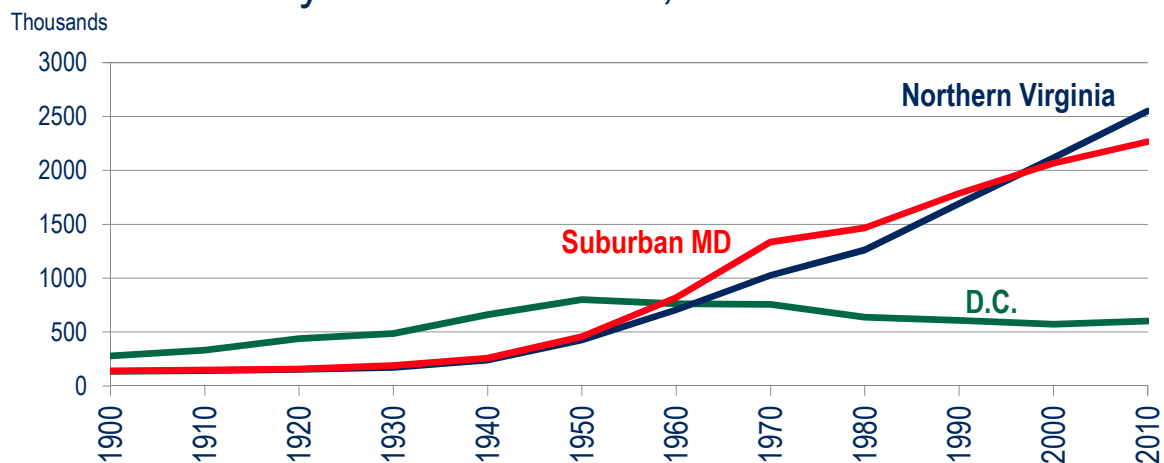
## Population Growth by Decade Washington MSA 1900 - 2010



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

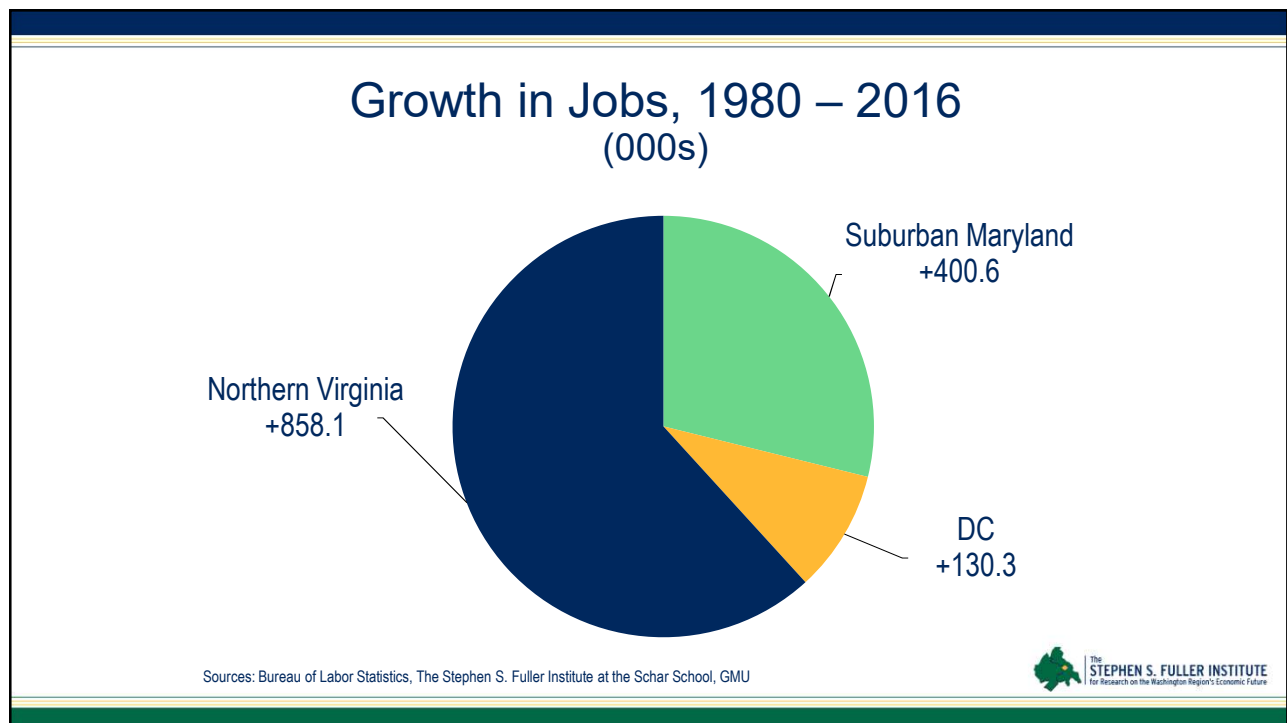
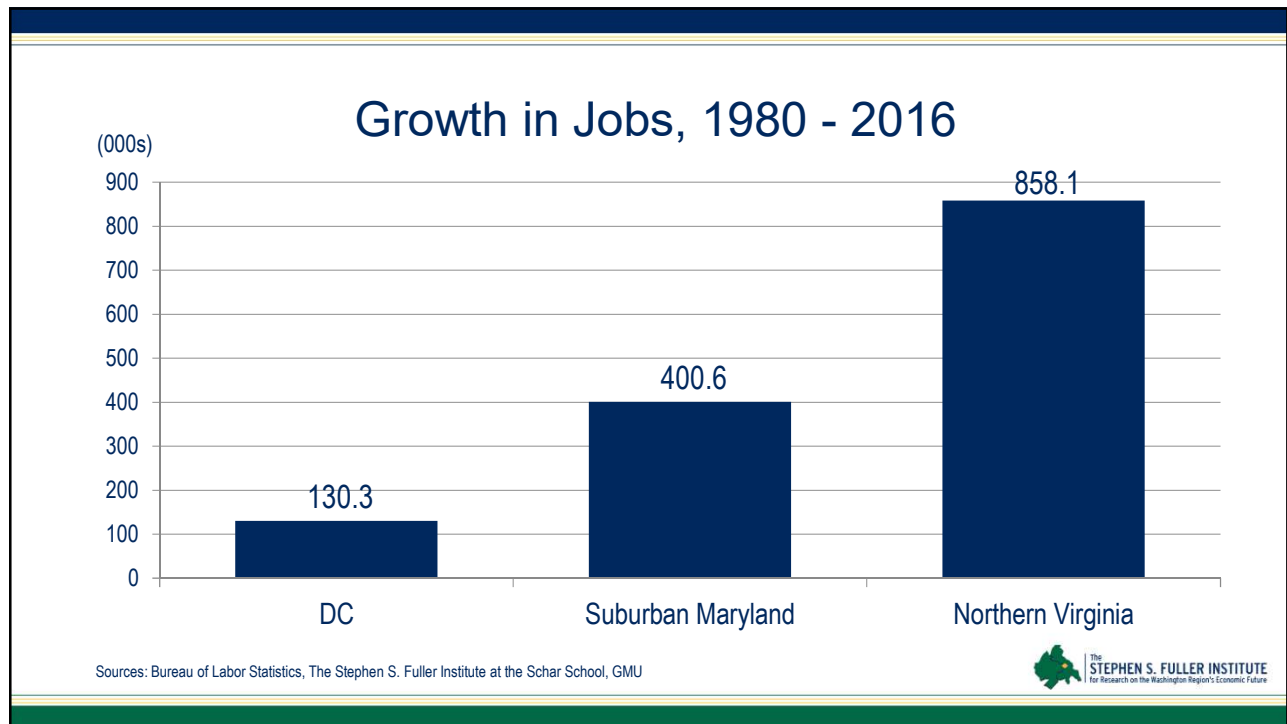
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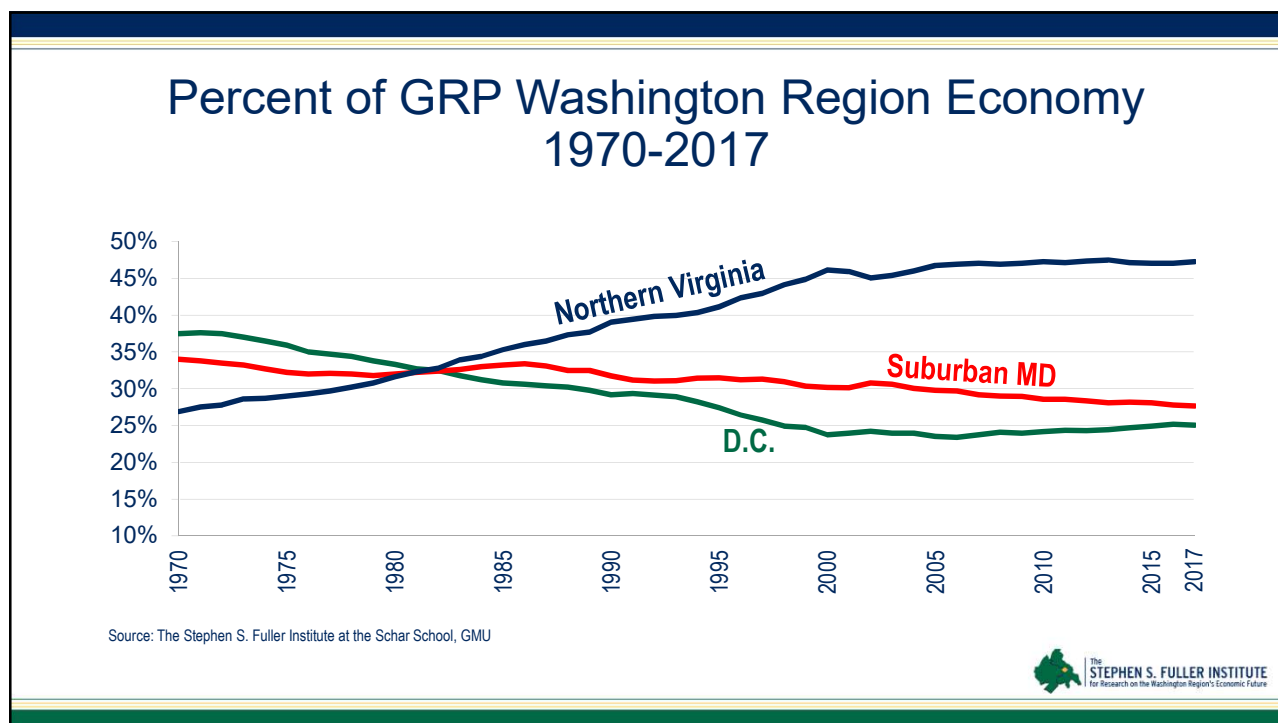
## Population in the Washington MSA By Sub-State Area, 1900 - 2010



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

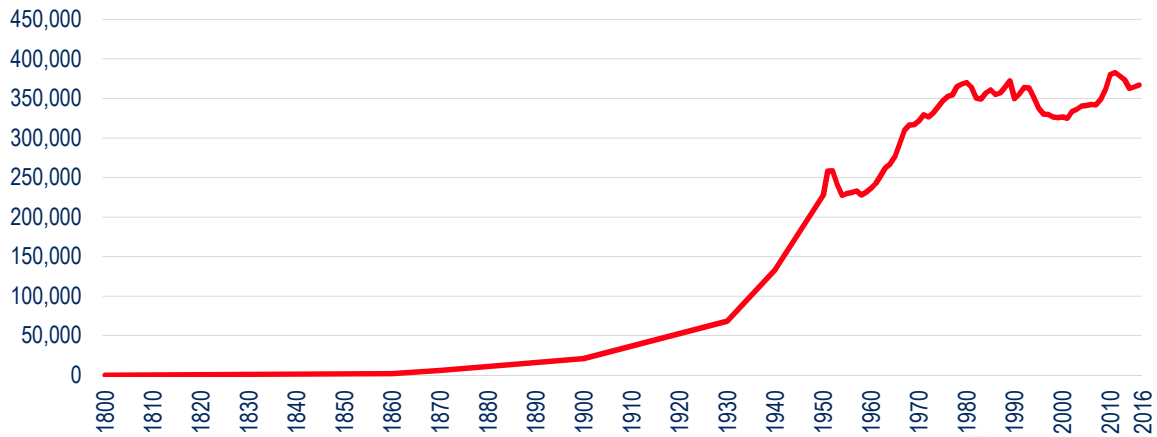
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## 2. Growth of the Washington Region as the “Capital of the Free World”

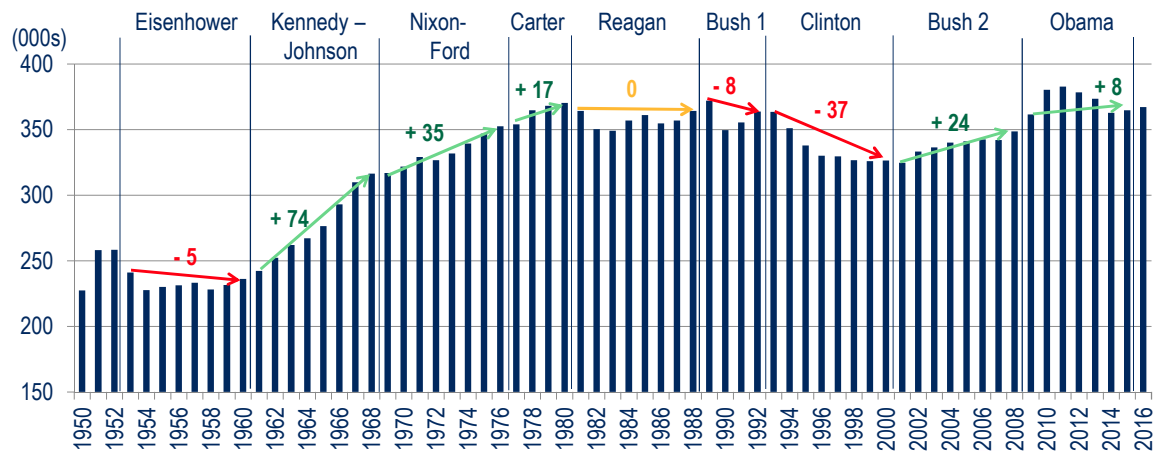
## Federal Employment in the Washington Region, 1800-2016



Source: U.S. Bureau of Labor Statistics (Not Seasonally Adjusted), The Stephen S. Fuller Institute at the Schar School, GMU



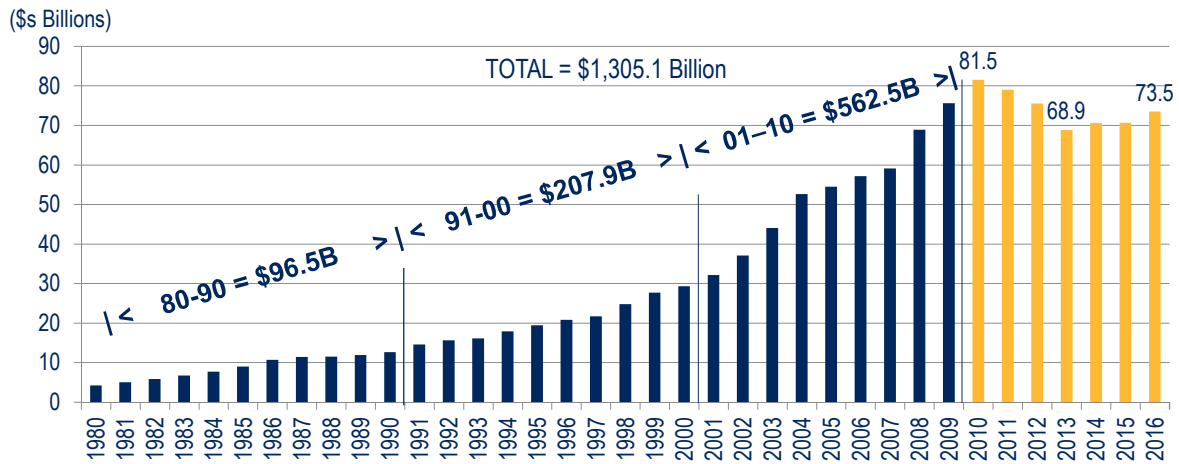
## Federal Employment in the Washington Region, 1950-2016



Source: U.S. Bureau of Labor Statistics (Not Seasonally Adjusted), The Stephen S. Fuller Institute at the Schar School, GMU



## Federal Procurement in the Washington Region, 1980-2016



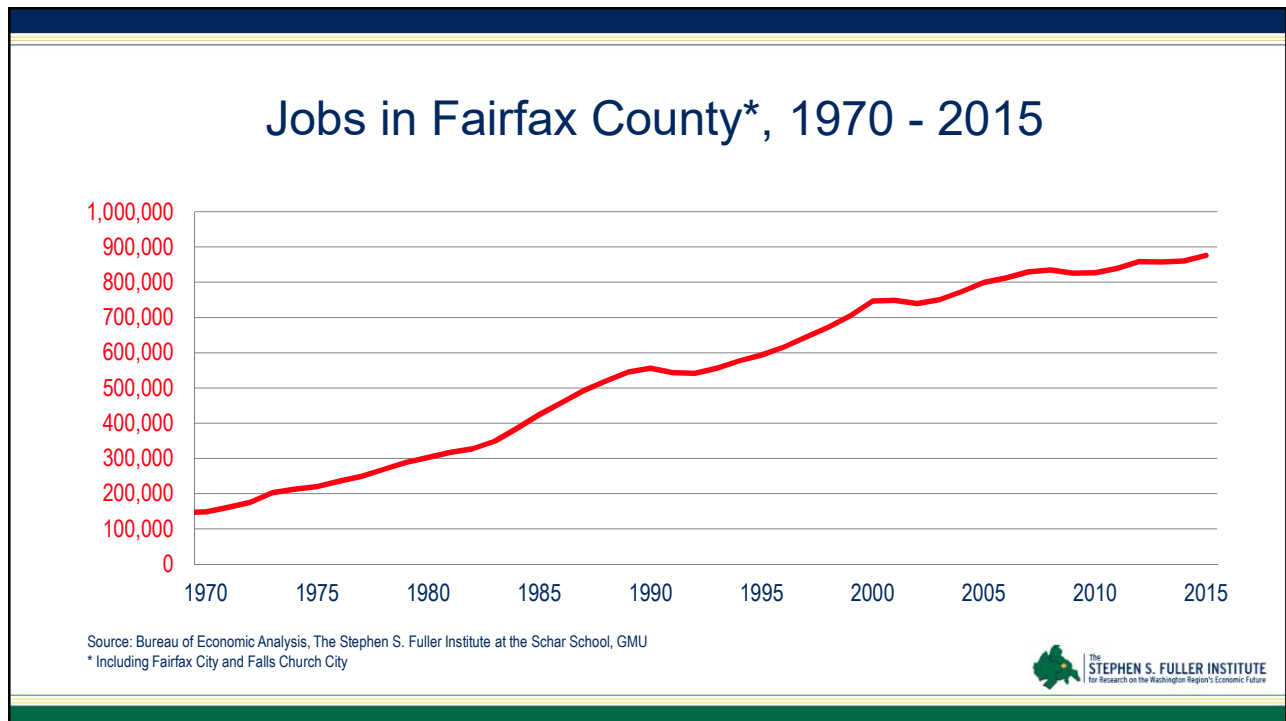
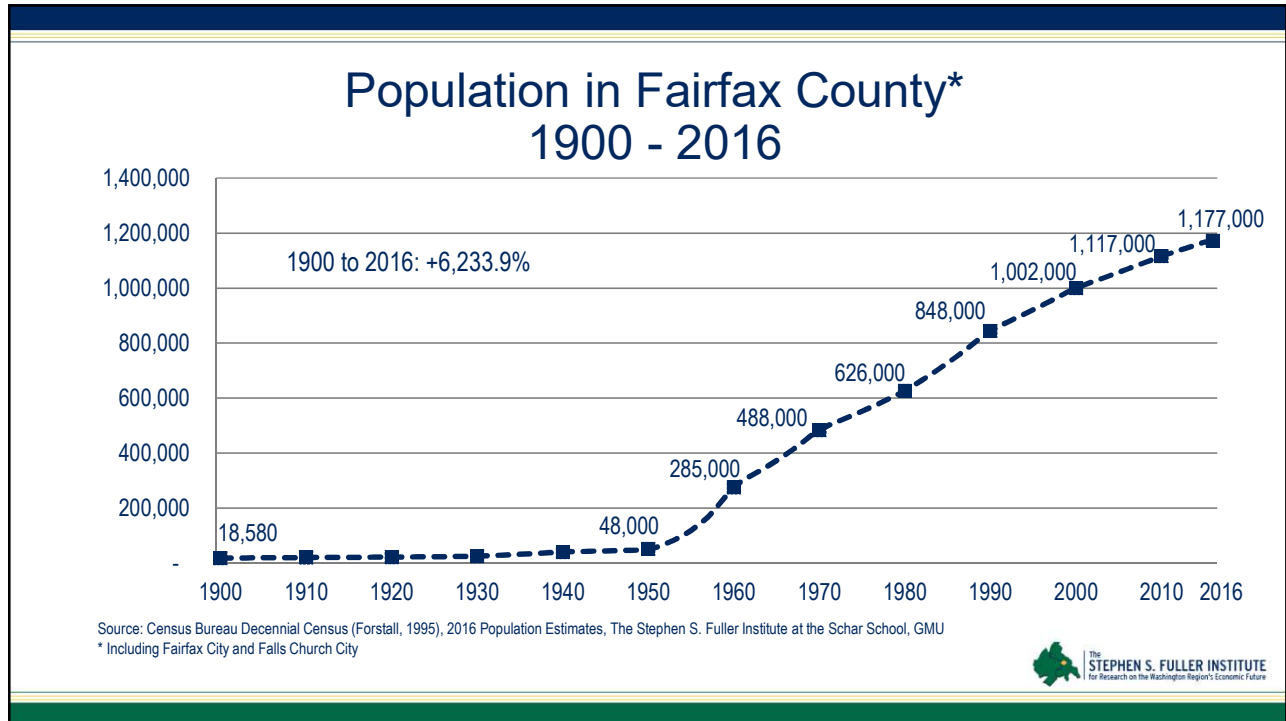
Source: US Census, Consolidated Federal Funds Report and USAspending.gov, The Stephen S. Fuller Institute at the Schar School, GMU



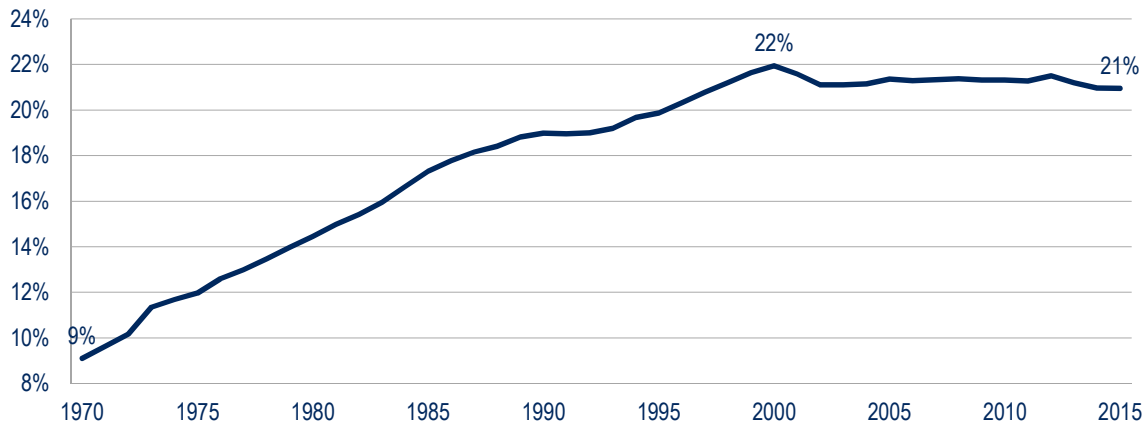
### 3. Suburbanization and Changes in Where People Live and Work







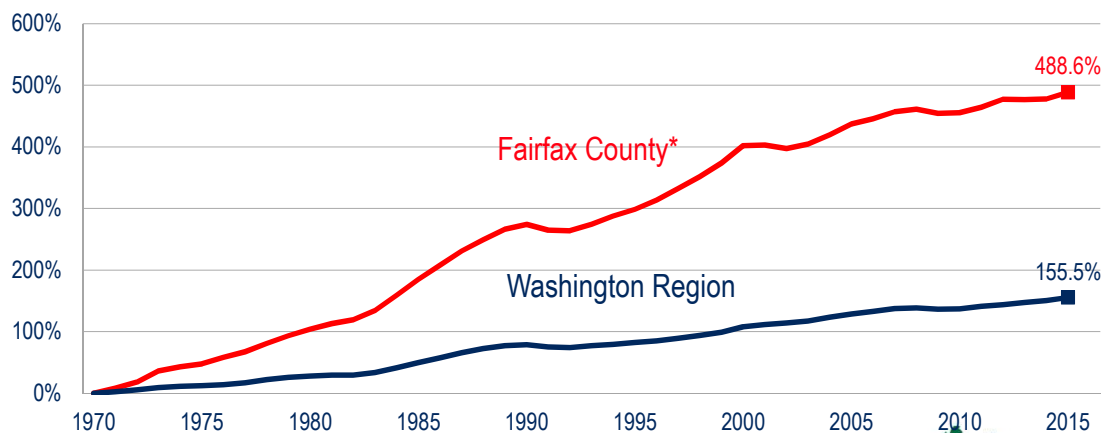
## Share of Washington Region Jobs in Fairfax County\*, 1970 - 2015



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

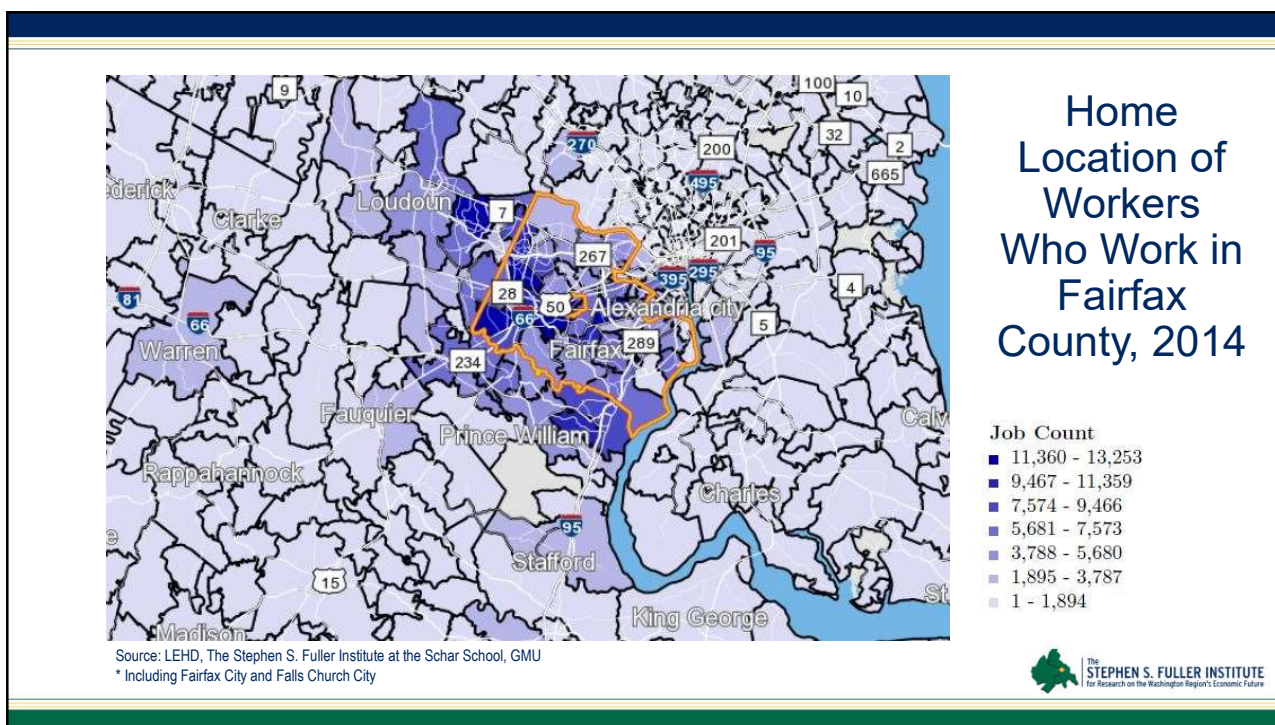


## Cumulative Job Growth Fairfax County\* and the Washington Region, 1970 - 2015



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

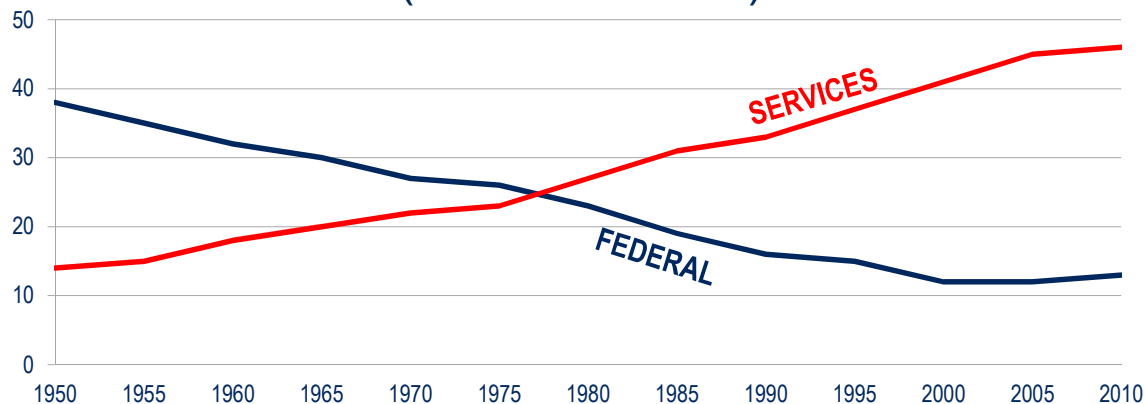




## 4. The Changing Structure of the Washington Region's economy



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

	Employed Residents				1930 – 2016 Change	
	1930	1940	1950	2016	#	%
Farm**	2,704	2,015	1,588	979	- 1,725	- 63.8%
Non-Farm**	7,049	12,224	31,134	623,058	616,009	8,739.0%
Total	9,753	14,239	32,722	624,037	614,284	6,298.4%
<i>Farm as % of Total</i>	27.7%	14.2%	4.9%	0.2%	- 27.6 pct pts	- 99.4%

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

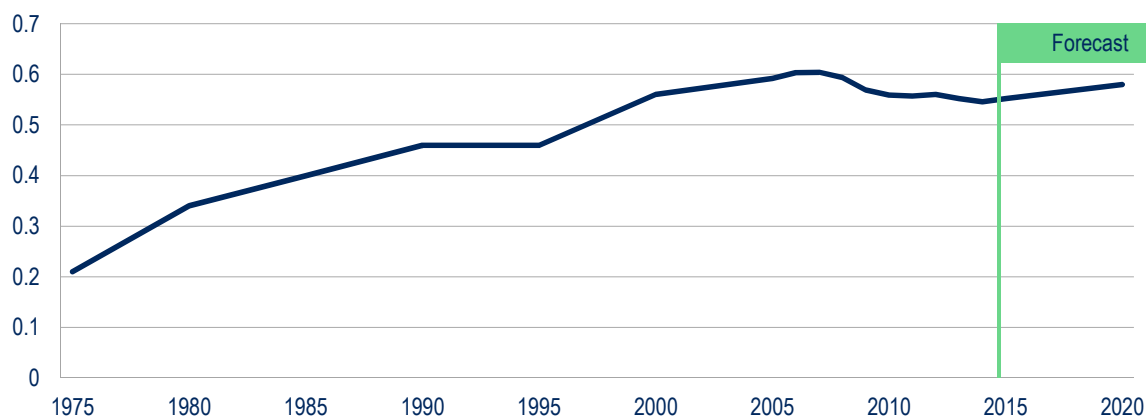
\* Including Fairfax City and Falls Church City

\*\* Farm includes Agriculture, Natural Resources and Fishing



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



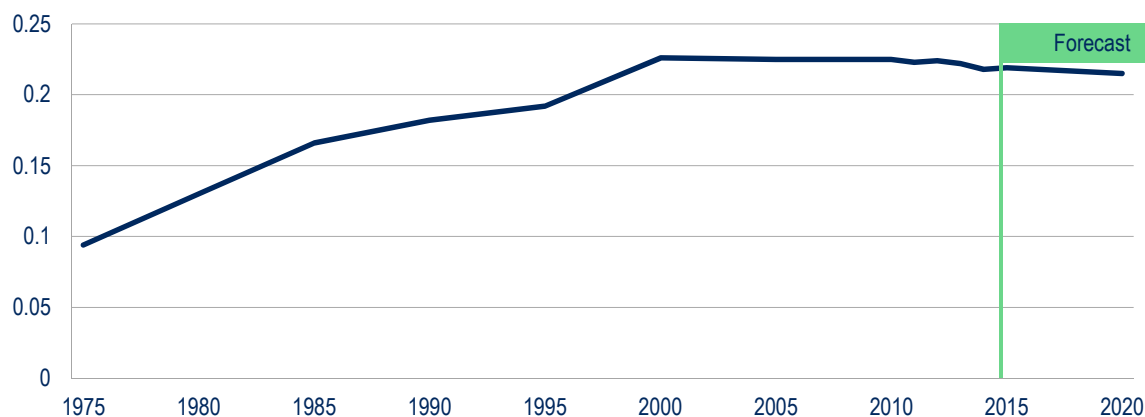
Source: The Stephen S. Fuller Institute at the Schar School, GMU

\* Including Fairfax City and Falls Church City



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## Fairfax County Gross County Product as Percent of Regional Gross Regional Product 1975 - 2020



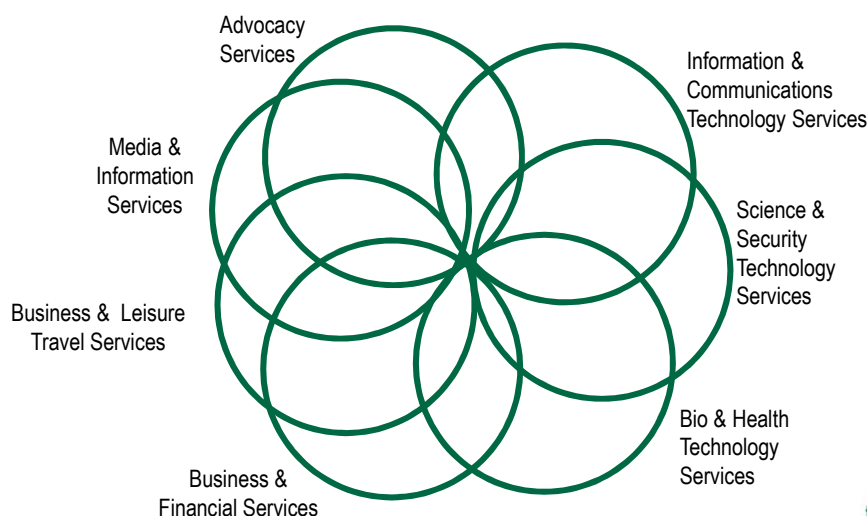
Source: The Stephen S. Fuller Institute at the Schar School, GMU  
\* Including Fairfax City and Falls Church City



## 5. Globalization, Technology, and the Rise of the Knowledge-Based Economy



## The Washington Region's Advanced Industrial Clusters



## The Washington Region's Advanced Industrial Clusters Job Growth Forecast

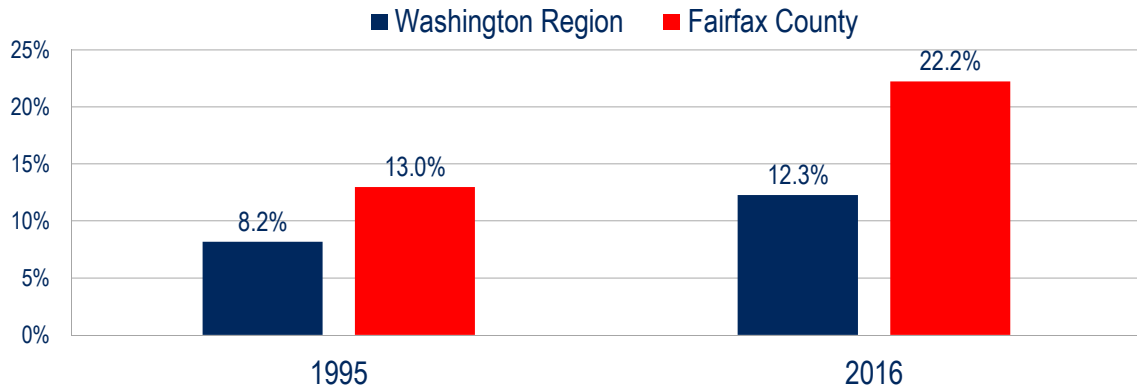
<u>Clusters</u>	<u>2014-2025 Job Forecast</u>			
	<u>Low</u>	<u>%</u>	<u>High</u>	<u>%</u>
Advocacy Services	122,303	5.7	138,868	20.0
Info & Comm. Tech	213,621	4.5	224,872	10.0
Sci & Security Tech	135,707	9.6	147,104	18.8
Bio & Health Tech	58,388	5.4	67,929	22.6
Business & Fin. Serv.	218,851	15.1	269,053	41.5
Media & Info Services	36,292	1.5	41,667	16.6
Business & Leisure T.	87,807	2.2	91,512	6.5
<b>All Clusters</b>	<b>872,969</b>	<b>7.6</b>	<b>981,005</b>	<b>20.9</b>
<b>All Jobs in WMA</b>	<b>3,092,270<sup>1</sup></b>	<b>4.0</b>	<b>3,402,570<sup>1</sup></b>	<b>14.4</b>

Source: Inforum, University of Maryland, December 2015

<sup>1</sup>Reflects narrower definition used in QCEW jobs data

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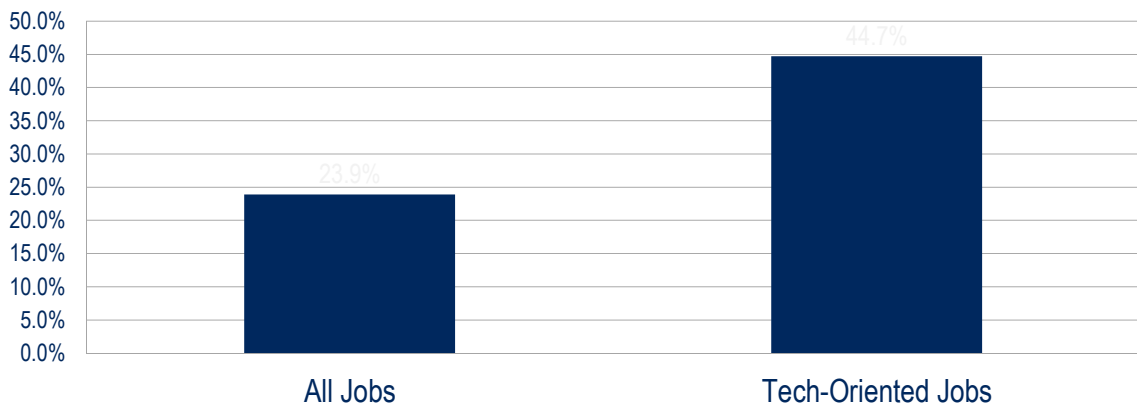
## Tech-Oriented Employment as Share of Total Employment



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



## Employment Growth in Fairfax as Percent of Region 1995 - 2016

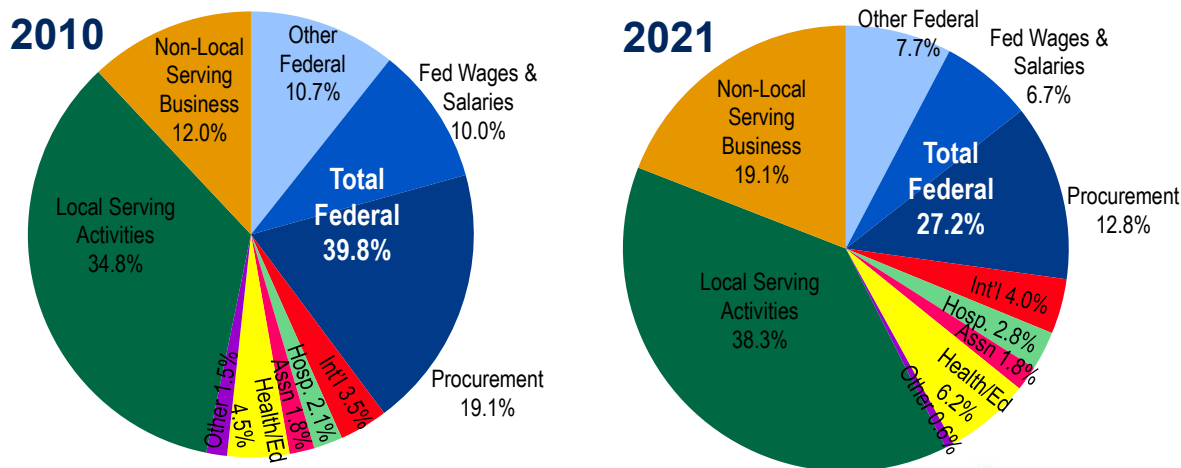


Sources: Quarterly Census of Earnings and Wages, The Stephen S. Fuller Institute at the Schar School, GMU





## The Changing Structure of the Washington Region Economy



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



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## Thank You & Questions

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