



Fairfax County: Five Major Forces Shaping Its Economic Evolution

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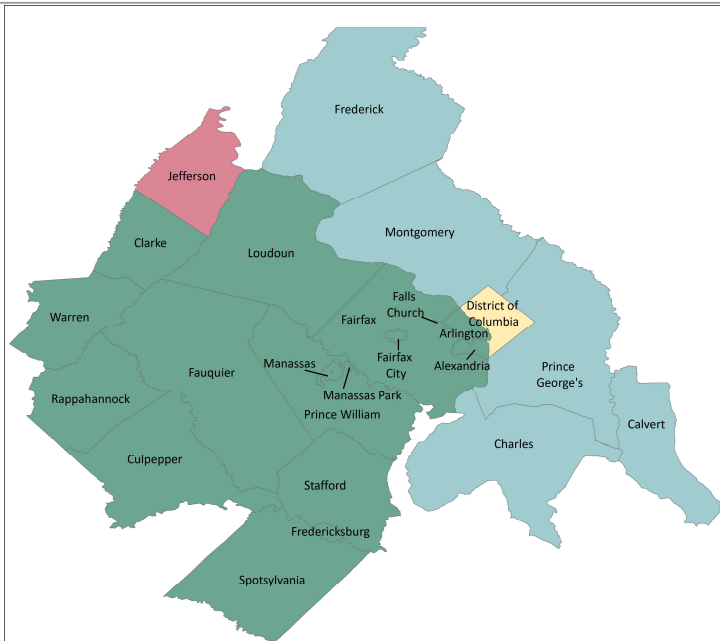


September 20, 2017

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

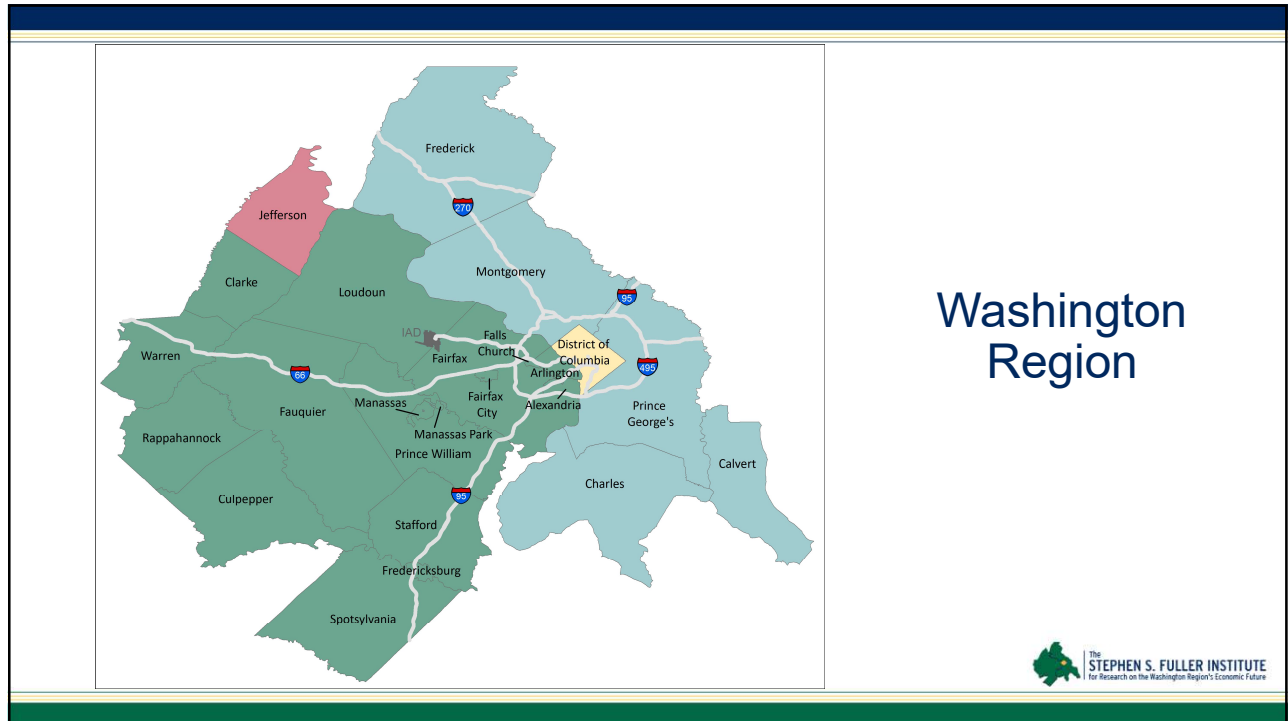


1. The Region's geography, geology and historic development pattern



Washington
Region



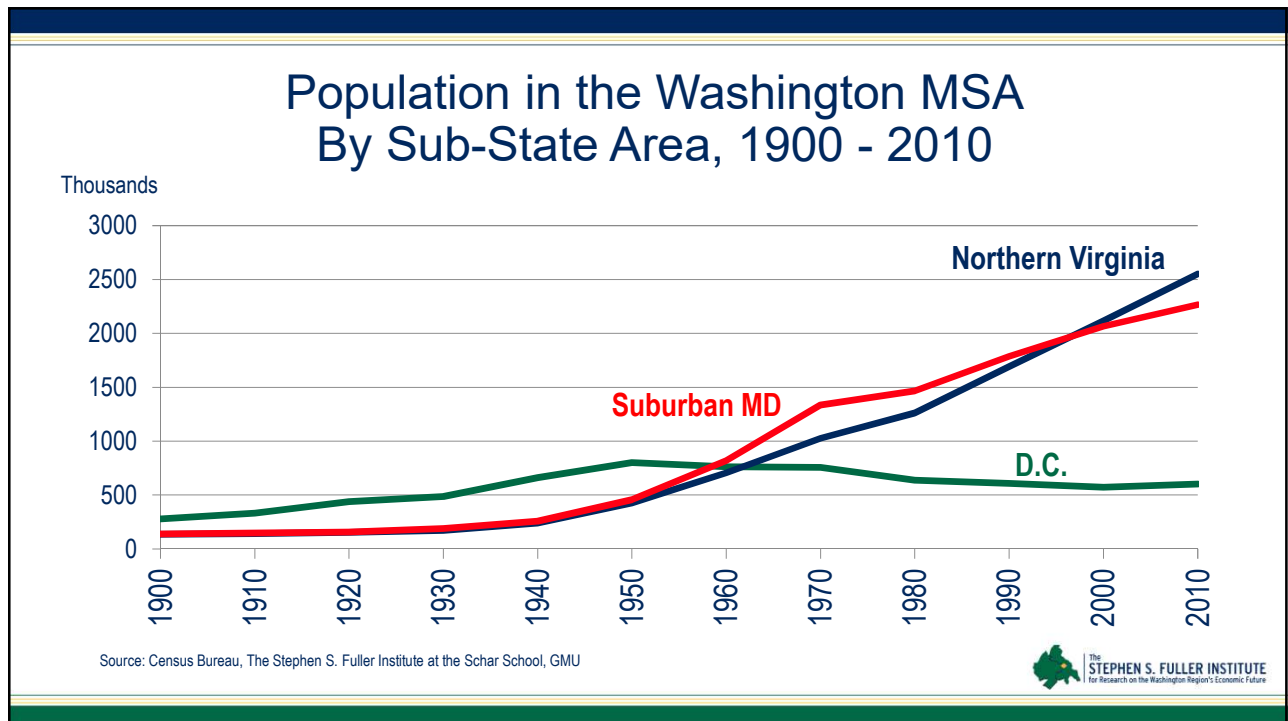
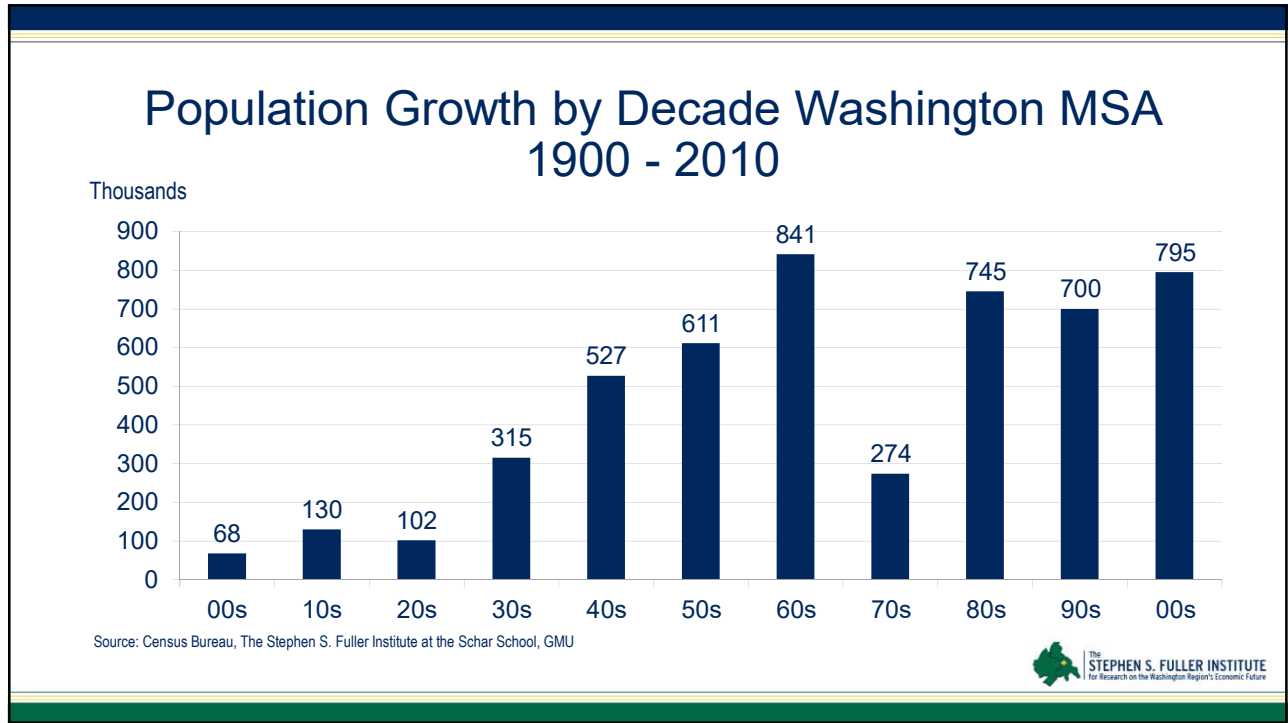


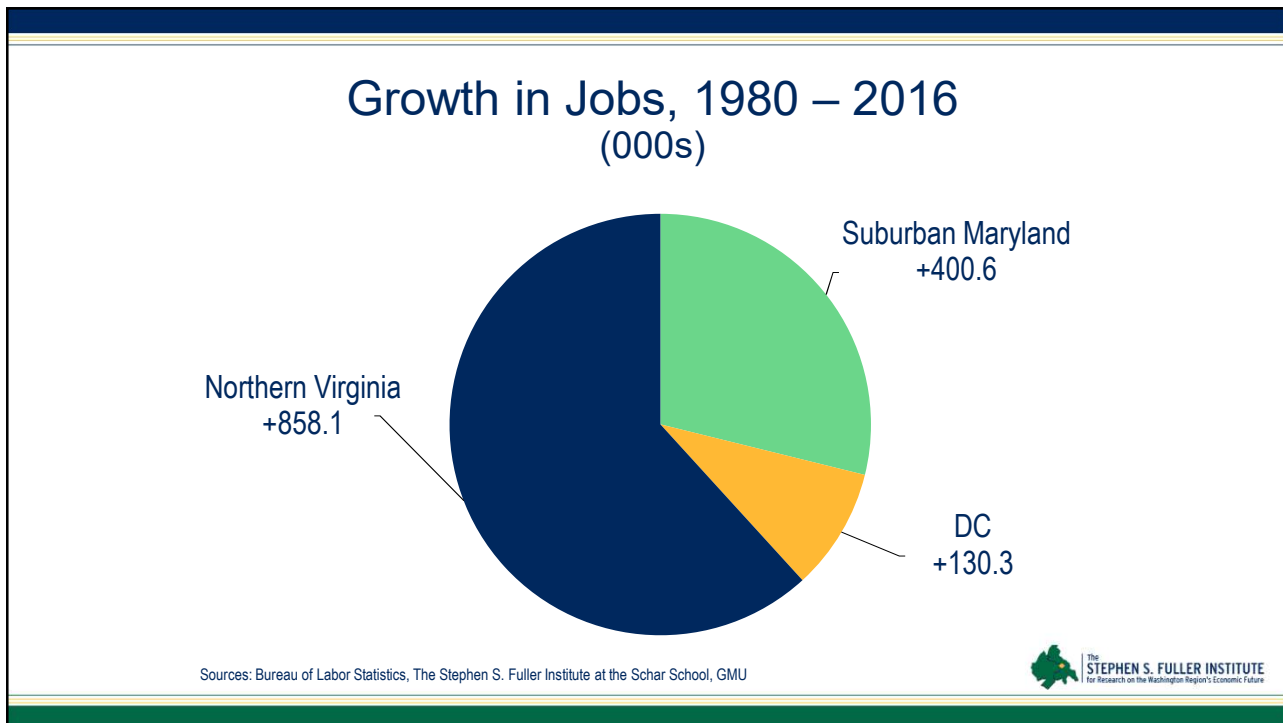
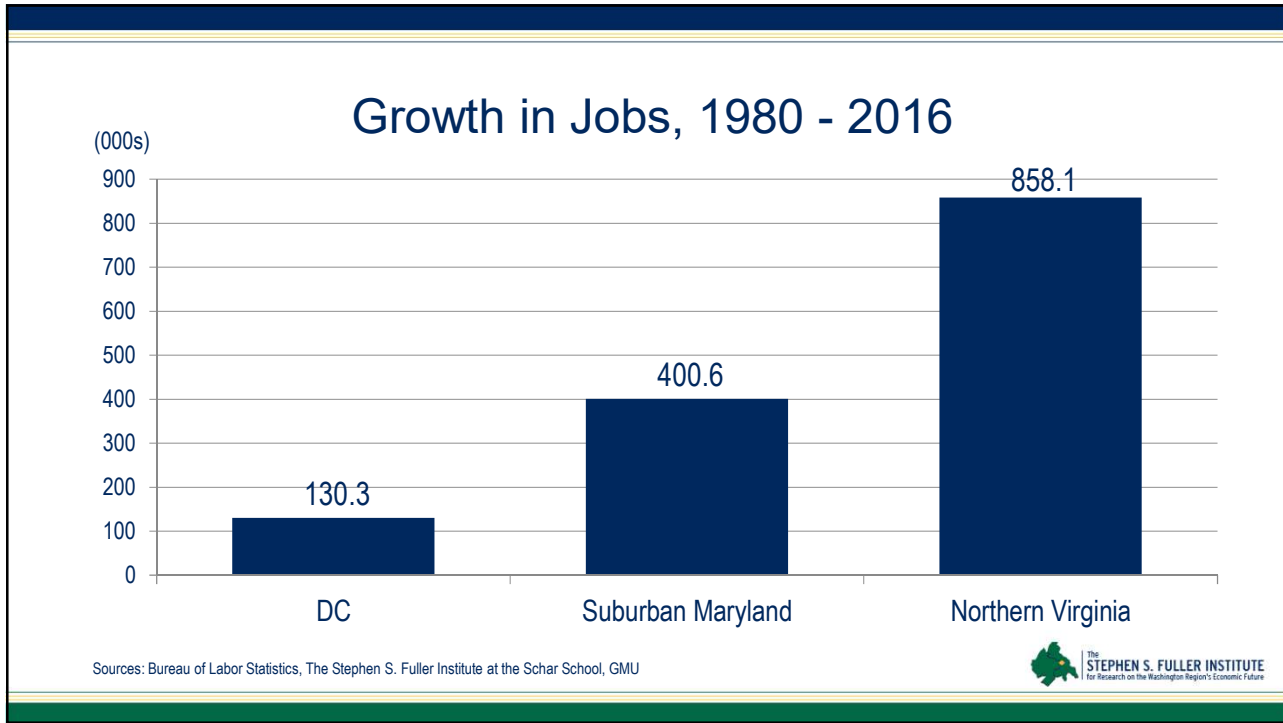
Population and Federal Employment Growth In the Washington Area, 1800-2000

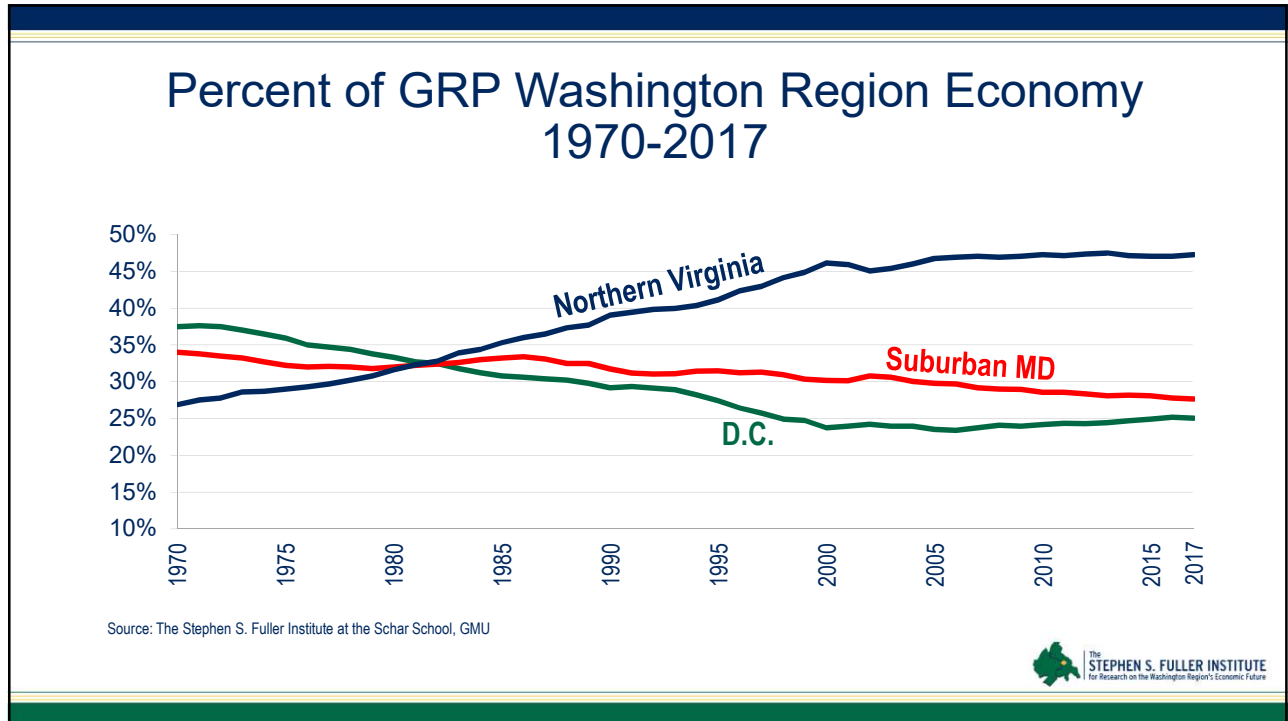
| Years | Population | | Federal Employees |
|-------|------------|------------|-------------------|
| | DC | Metro Area | |
| 1800 | 8,144 | 63,653* | 131** |
| 1860 | 75,080 | 141,215* | 2,199** |
| 1870 | 131,700 | 203,108* | 6,222** |
| 1900 | 278,718 | 378,605* | 20,834** |
| 1930 | 486,869 | 672,198 | 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



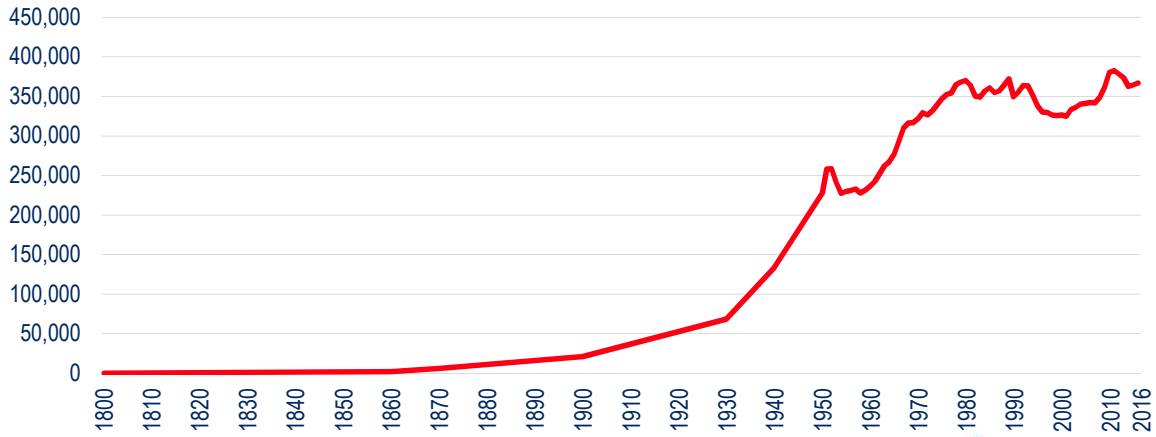






2. Growth of the Washington Region as the “Capital of the Free World”

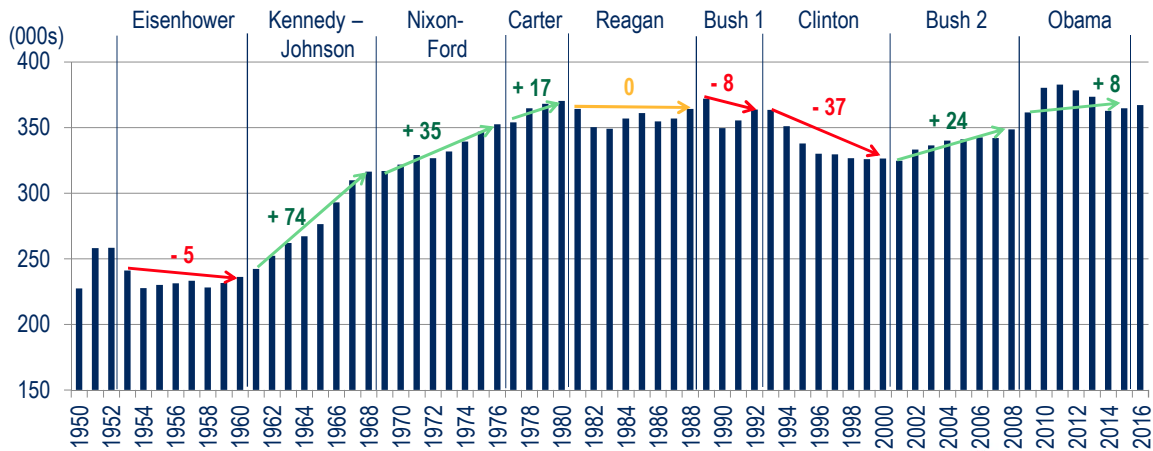
Federal Employment in the Washington Region, 1800-2016



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



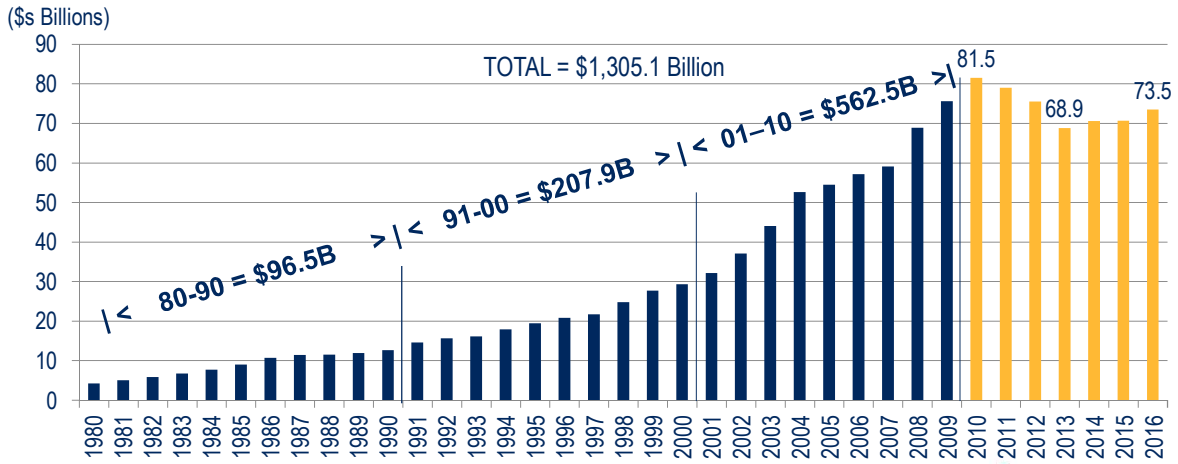
Federal Employment in the Washington Region, 1950-2016



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



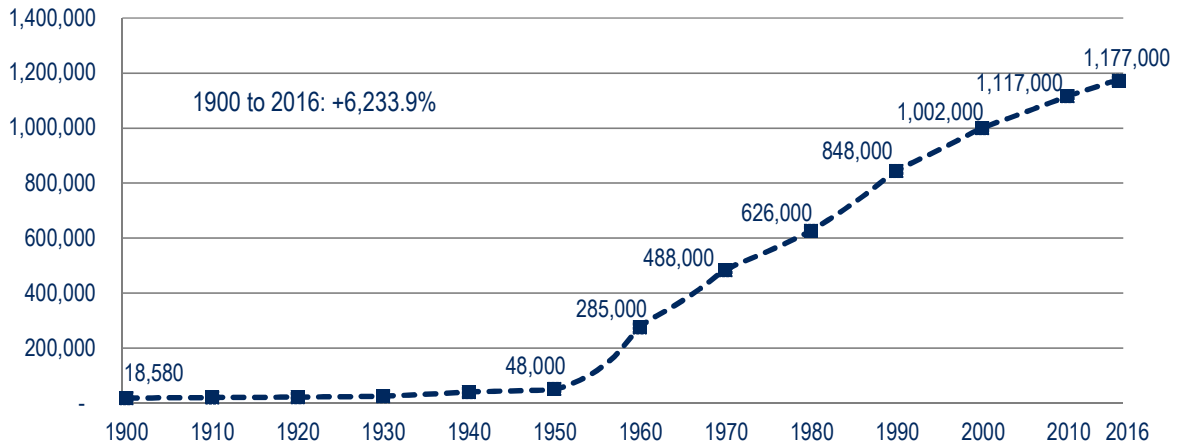
Source: US Census, Consolidated Federal Funds Report and USAspending.gov, The Stephen S. Fuller Institute at the Schar School, GMU



3. Suburbanization and Changes in Where People Live and Work



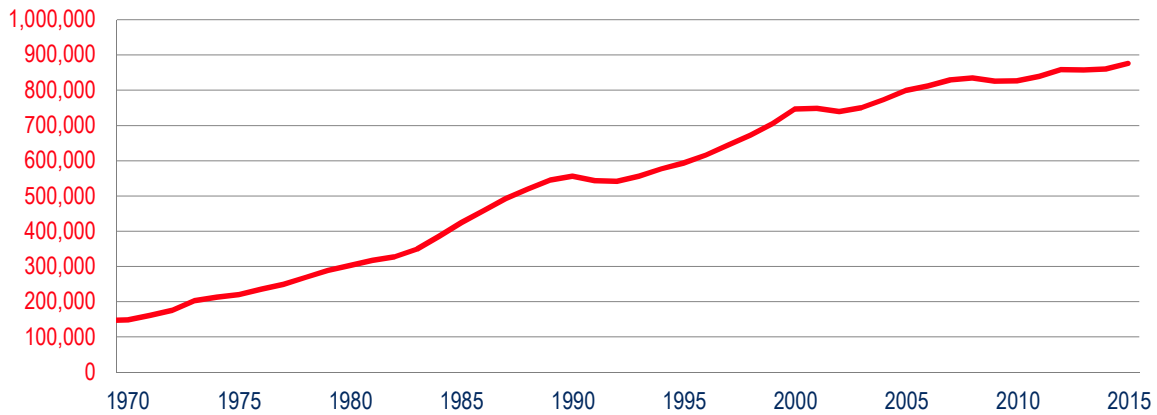
Population in Fairfax County* 1900 - 2016



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



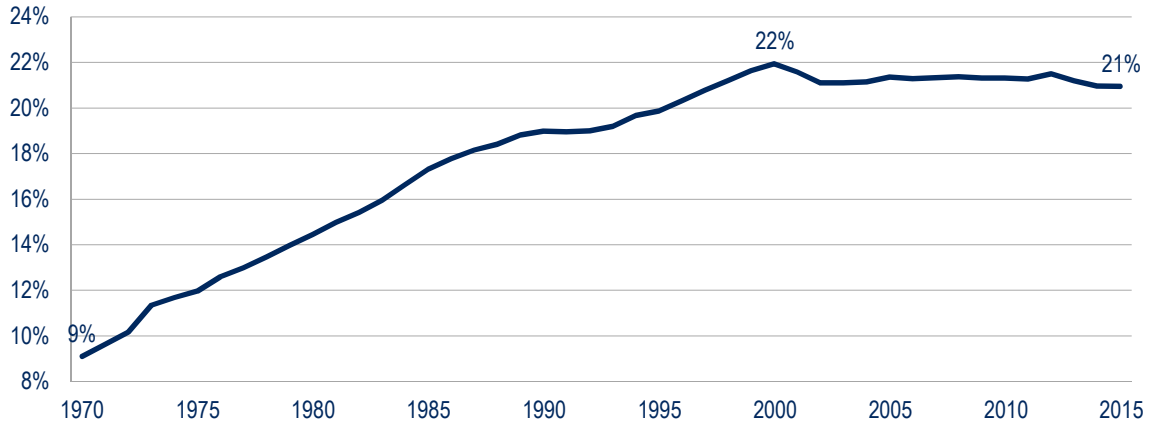
Jobs in Fairfax County*, 1970 - 2015



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



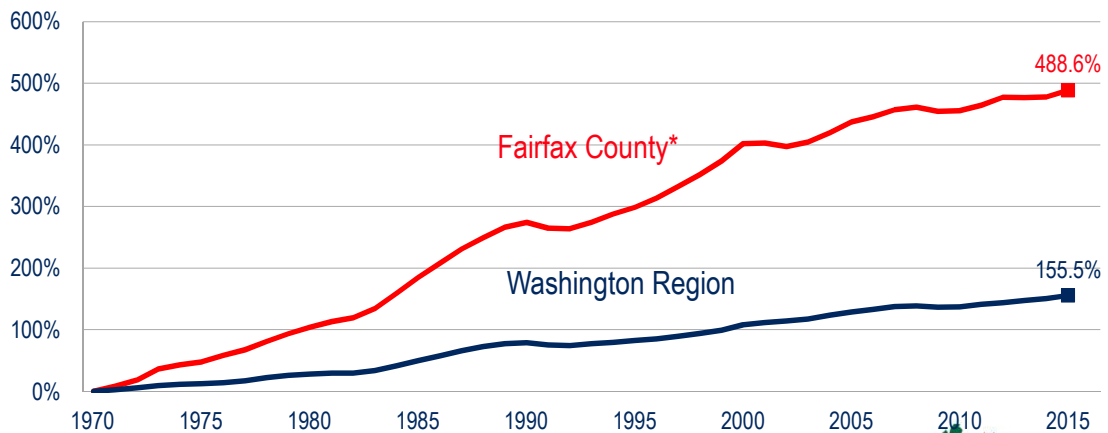
Share of Washington Region Jobs in Fairfax County*, 1970 - 2015



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

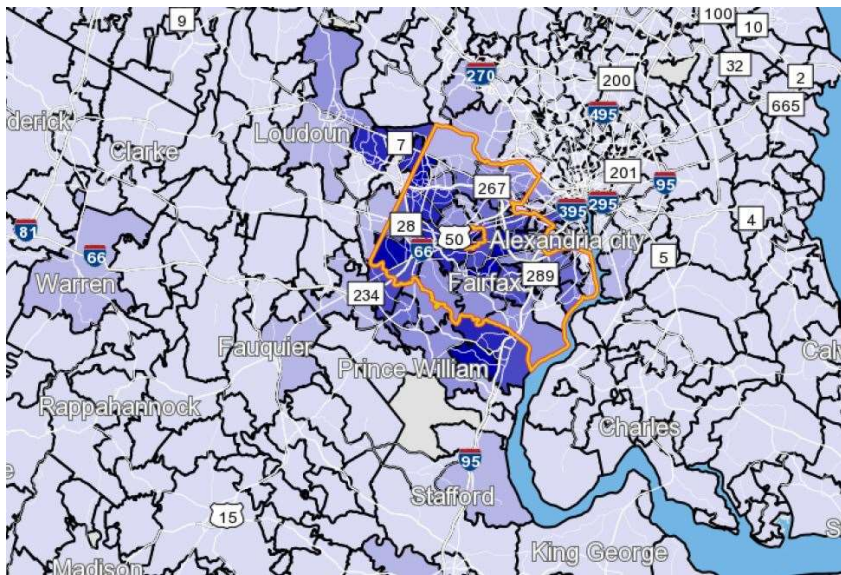


Cumulative Job Growth Fairfax County* and the Washington Region, 1970 - 2015



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

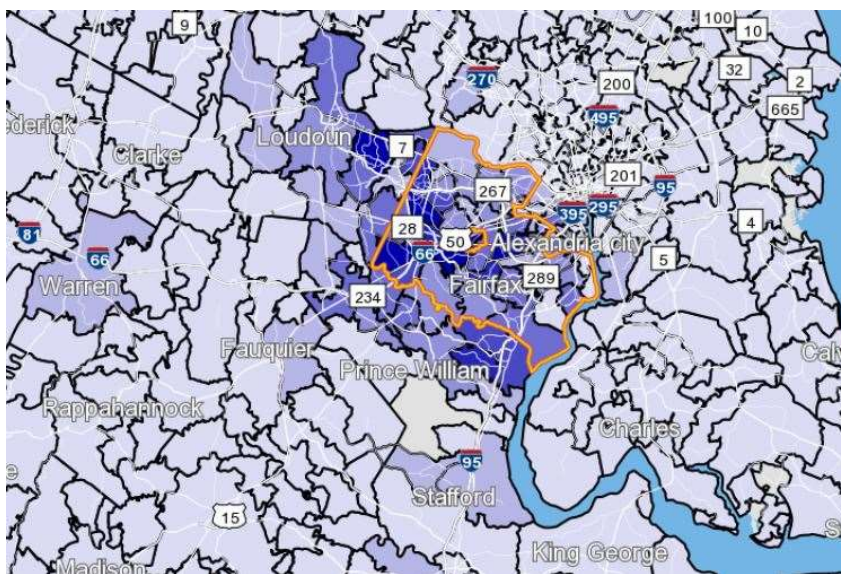




Home Location of Workers Who Work in Fairfax County, 2002

- 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

Source: LEHD, 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, 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

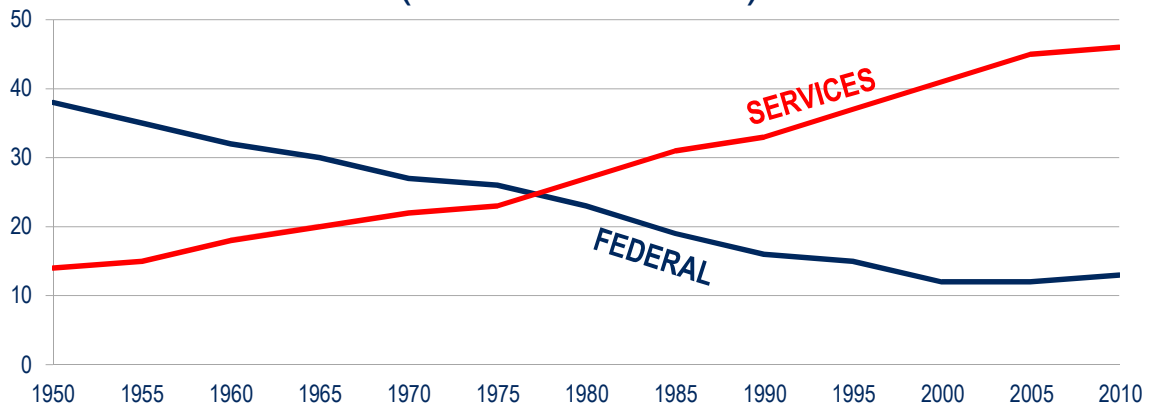
Source: LEHD, The Stephen S. Fuller Institute at the Schar School, GMU
 * Including Fairfax City and Falls Church City



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



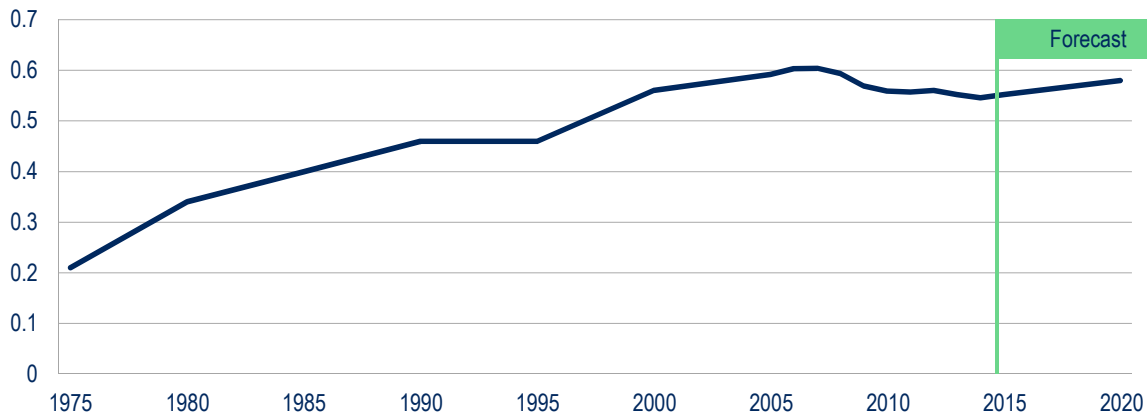
Employed Residents in Fairfax* County, 1930 - 2016

| | 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> | <i>27.7%</i> | <i>14.2%</i> | <i>4.9%</i> | <i>0.2%</i> | <i>- 27.6 pct pts</i> | <i>- 99.4%</i> |

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

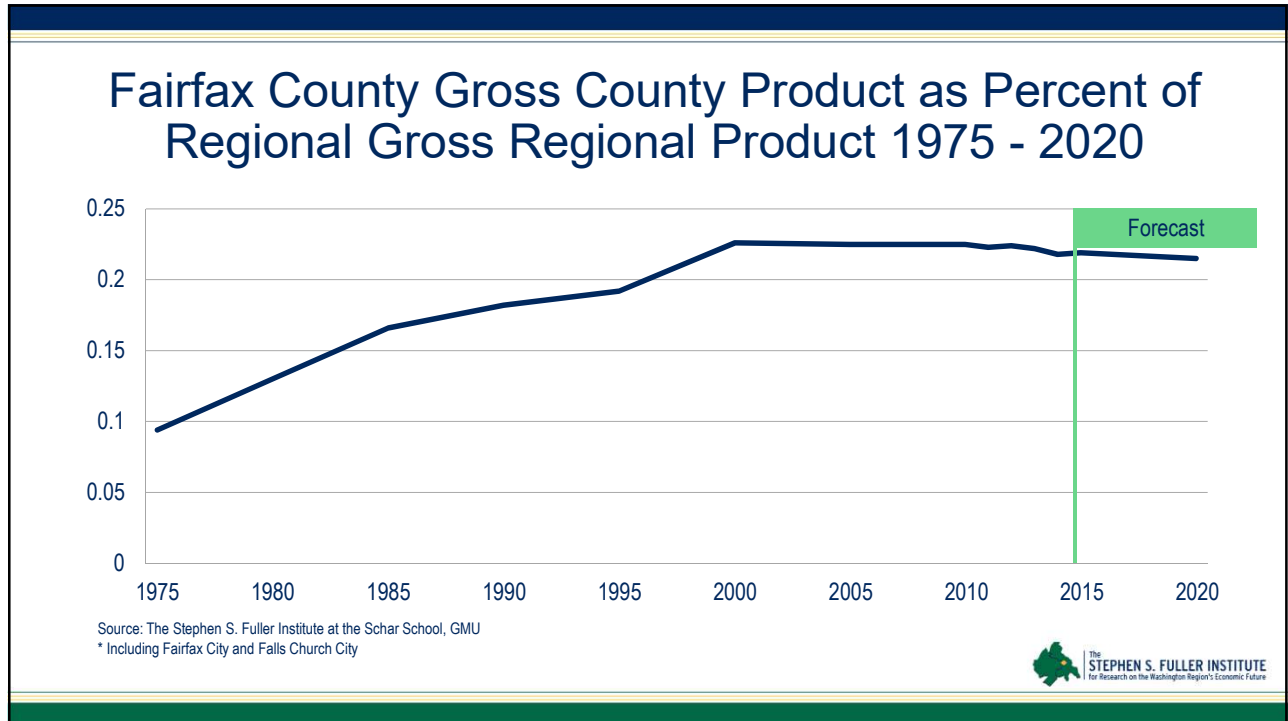


Residents Per At-Place Job Fairfax County* 1975 - 2020



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

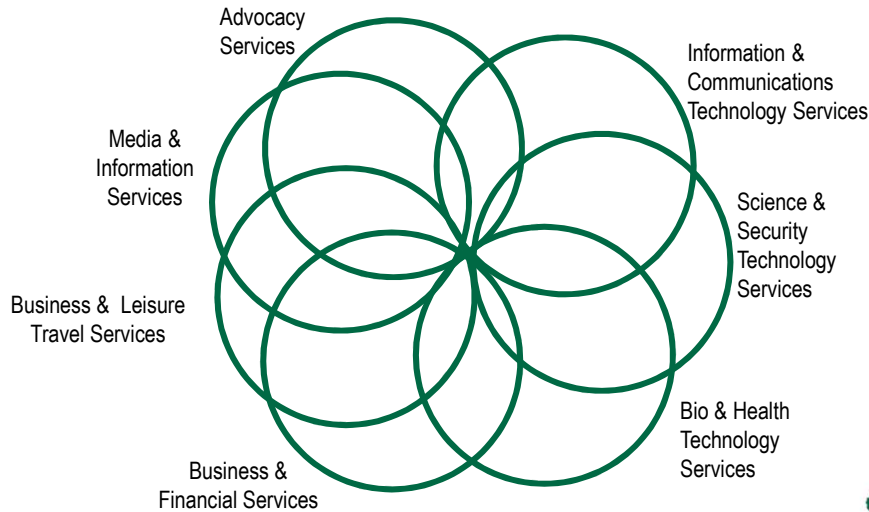




5. Globalization, Technology, and the Rise of the Knowledge-Based Economy

THE STEPHEN S. FULLER INSTITUTE
 For Research on the Washington Region's Economic Future

The Washington Region's Advanced Industrial Clusters



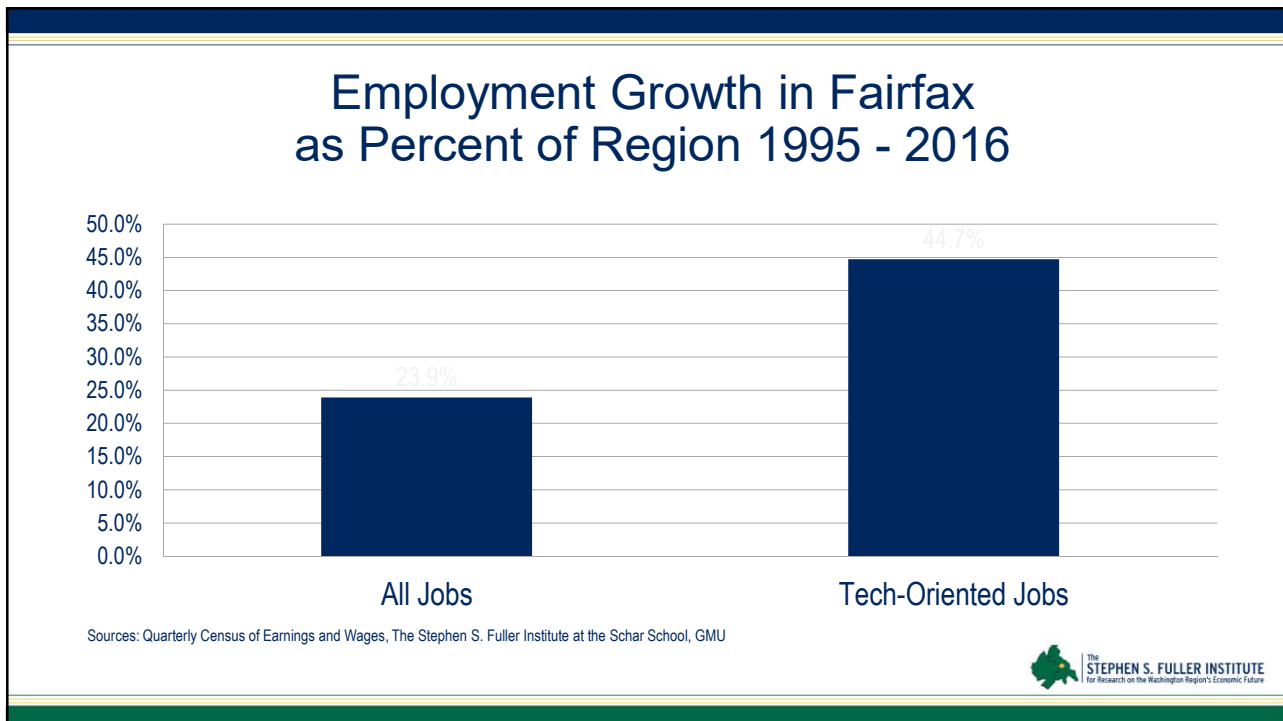
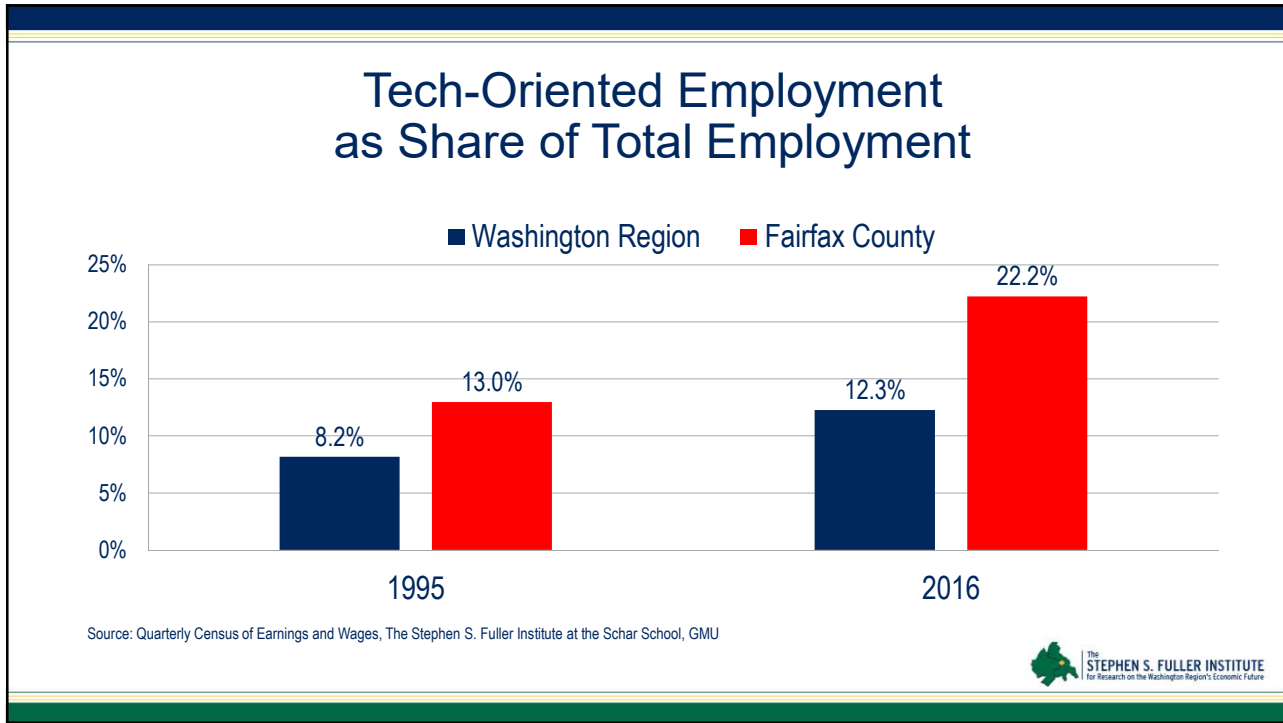
The Washington Region's Advanced Industrial Clusters Job Growth Forecast

| Clusters | 2014-2025 Job Forecast | | | |
|------------------------|------------------------------|------------|------------------------------|-------------|
| | Low | % | High | % |
| 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 |
| All Clusters | 872,969 | 7.6 | 981,005 | 20.9 |
| All Jobs in WMA | 3,092,270¹ | 4.0 | 3,402,570¹ | 14.4 |

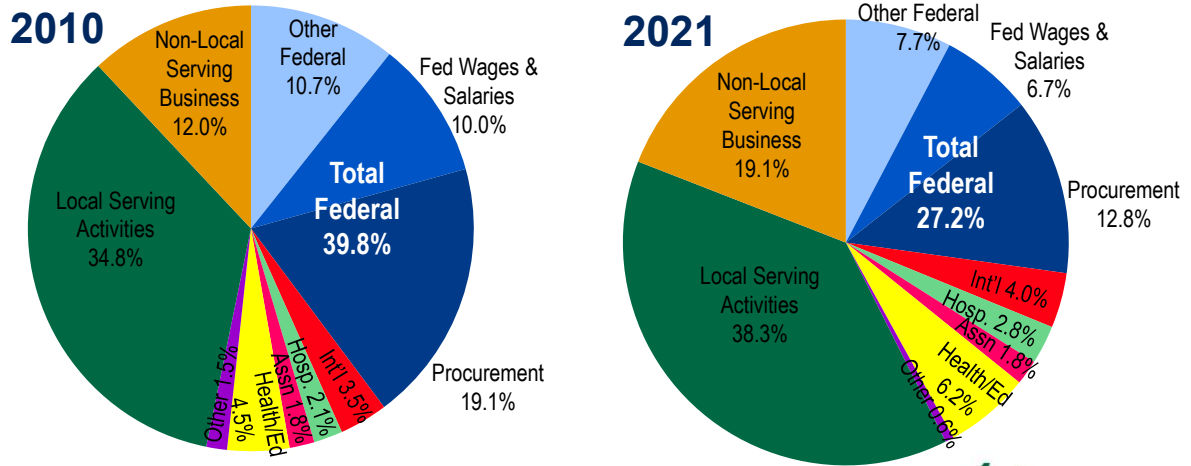
Source: Inforum, University of Maryland, December 2015

¹Reflects narrower definition used in QCEW jobs data





The Changing Structure of the Washington Region Economy



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:

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