

## Housing the Region's Future Workforce Policy Challenges for Local Jurisdictions

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### Forecasting Housing Demand

- 2010 Study: Forecasts for the Reston/Dulles Rail Corridor and Route 28 Corridor
  - Objective was to develop forecasts of development activity that represent likely market feasibility
  - Specific to Fairfax County, Metro station areas and Route 28 corridor
  - Forecasts of all residential and non-residential development
  - Used job forecasts generated pre-recession
  - Top down approach
- 2011 Study: Housing the Region's Workforce
  - Objective was to develop forecasts of housing needed to accommodate future workers
  - Regional and jurisdiction forecasts
  - Forecasts of housing demand associated with *new* workers only
  - Used job forecasts generated post-recession
  - Bottom up approach

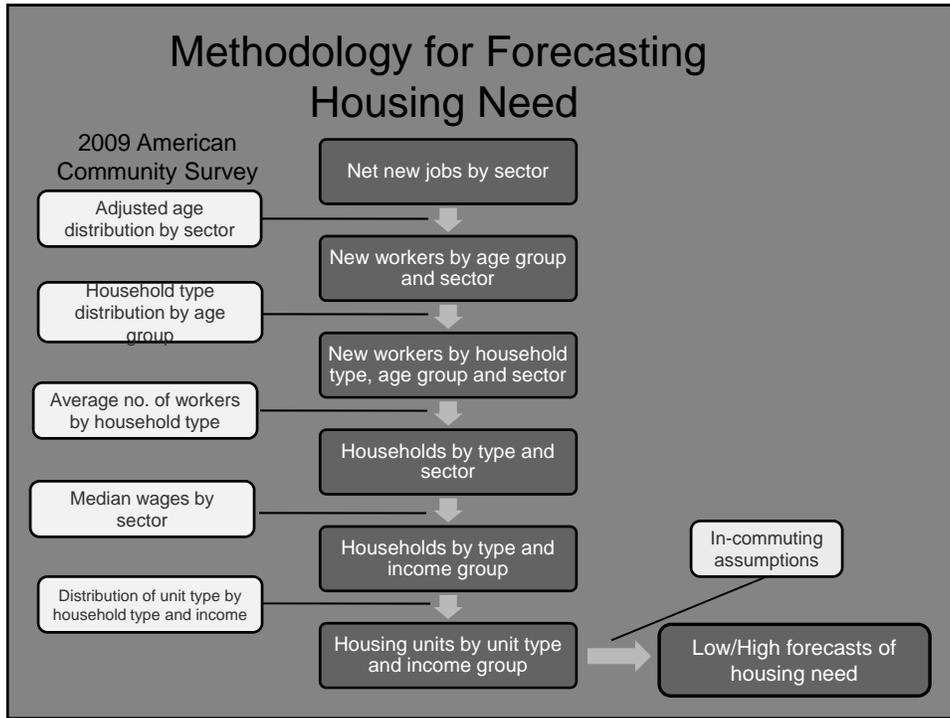
**Washington Metropolitan Area  
Growth Potential Summary: 2010 – 2030**  
(jobs and households in thousands)

<b>Indicator</b>	<b>2010</b>	<b>2030</b>	<b>Change</b>
GRP Growth	\$425 b	\$774.8	82.3%
Net Job Growth	2,760.6	3,814.5	1,053.9/ 38.2%
Replacement Job Growth		1,802.8	47.6%
HH Growth	2,067.8	2,623.6	555.8/ 26.9%

**Net New Jobs by Sub-state Region  
2010-2030**

	<b>Net New Jobs</b>	<b>Percent Change</b>
<b>District of Columbia</b>	<b>152,130</b>	<b>20.8</b>
<b>Suburban Maryland</b>	<b>316,525</b>	<b>32.9</b>
<b>Northern Virginia</b>	<b>578,480</b>	<b>54.9</b>
<i>Fairfax*</i>	<i>168,833</i>	<i>26.7</i>
<b>Washington Region</b>	<b>1,053,855</b>	<b>38.2</b>

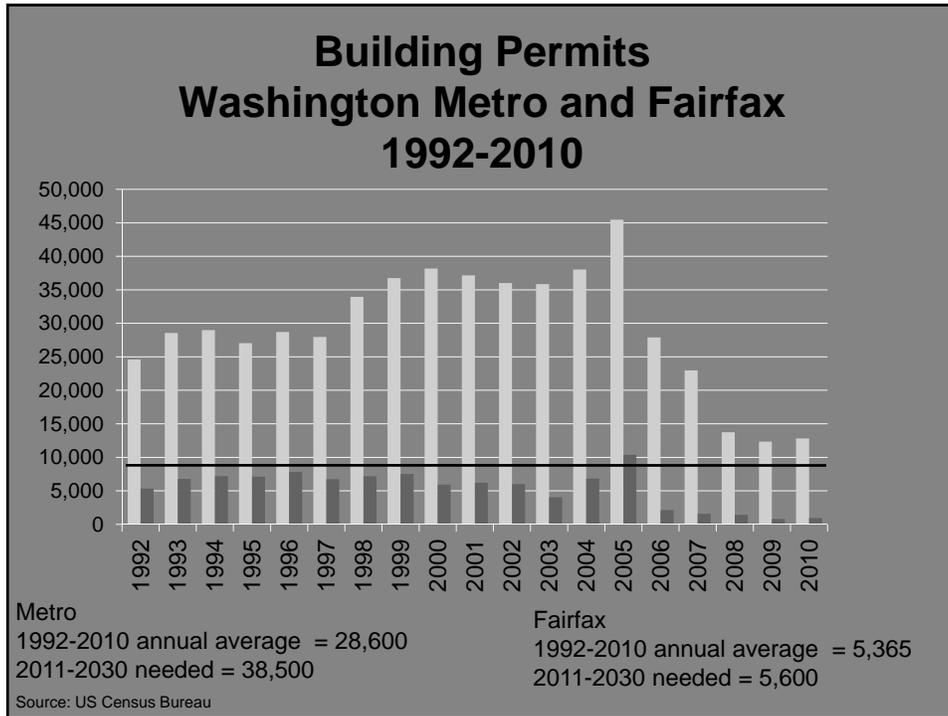
Source: IHS Global Insight, GMU Center for Regional Analysis  
\*Includes the independent cities of Fairfax and Falls Church



### Housing Demand by Sub-state Region 2010-2030

	High Estimates	Low Estimates
<b>District of Columbia</b>	<b>122,613</b>	<b>36,784</b>
<b>Suburban Maryland</b>	<b>211,612</b>	<b>133,731</b>
<b>Northern Virginia</b>	<b>392,817</b>	<b>174,191</b>
<i>Fairfax*</i>	<i>110,947</i>	<i>52,145</i>
<b>Washington Region</b>	<b>731,457</b>	<b>348,282</b>

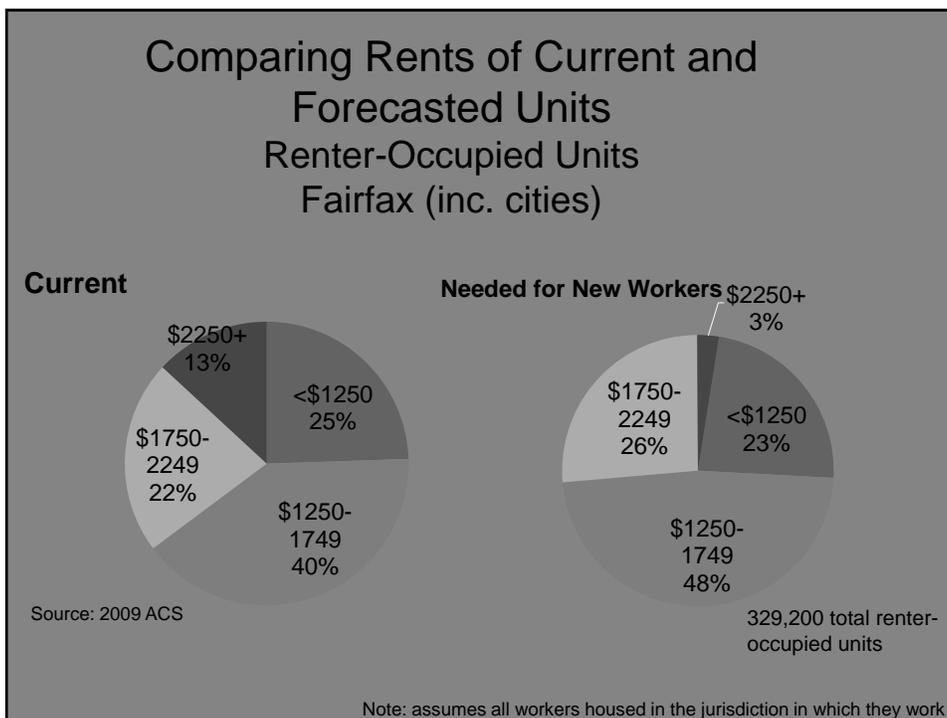
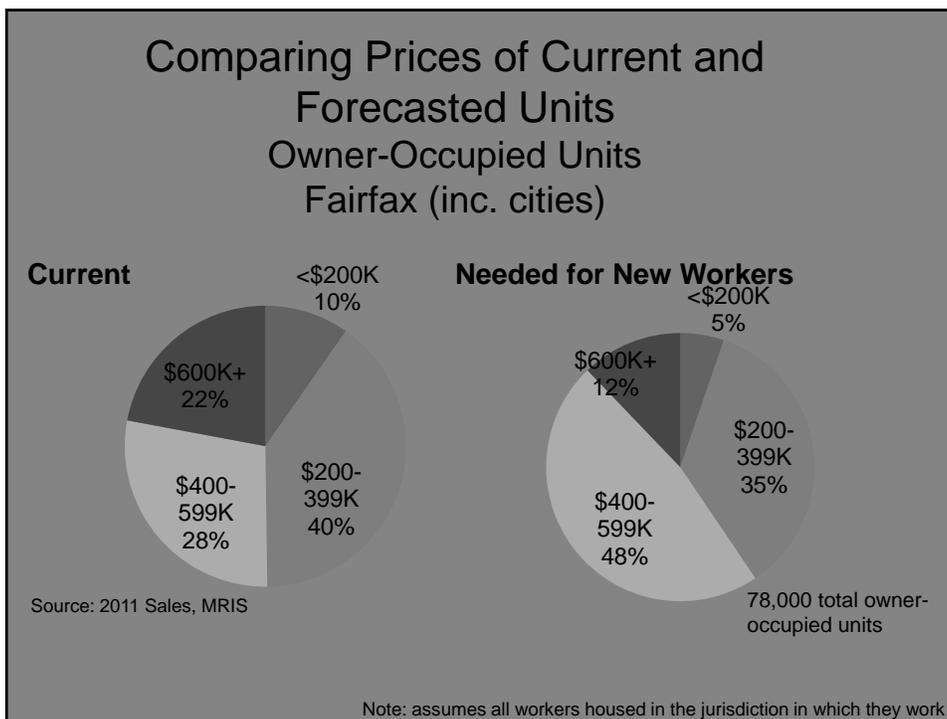
Note: The high estimates assume all workers are housed in the jurisdiction in which they work. The low estimates assume that new jobs have the same in-commuting rates as current jobs.



### Comparing Current and Forecasted Units Single-Family vs. Multi-Family Units

	Current*		Needed for New Workers	
	SF	MF	SF	MF
District of Columbia	39%	61%	8%	92%
Suburban Maryland	70%	30%	40%	60%
Northern Virginia	72%	28%	47%	53%
<i>Fairfax**</i>	<i>73%</i>	<i>27%</i>	<i>46%</i>	<i>54%</i>
Washington Region	67%	33%	39%	61%

\*Source: 2009 American Community Survey  
\*\*Includes the independent cities of Fairfax and Falls Church



## Housing Policy Issues

- Local jurisdictions are planning for an insufficient amount of housing to accommodate future workers.
- More housing is needed closer to jobs, in existing and growing regional employment centers.
- There is a need for more multi-family housing and smaller, more affordable owner and renter homes in the region.
- A lack of a sufficient supply of housing contributes to worsening traffic and quality of life and threatens our region's economic vitality.

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