

FAIRFAX COUNTY

HOUSING TASK FORCE

DRAFT Action Plan and Roadmap

March 12, 2026



Problem Statement

Fairfax County faces a critical gap between community need and housing supply, requiring coordinated action to reduce the shortage, attract and retain workers, and sustain our community's economic health and competitiveness.

Vision

Residents across all income levels and life stages have housing options in Fairfax County.

Core Mandate

Develop a comprehensive, multi-departmental roadmap to increase housing production, streamline development processes, and expand housing opportunities across the housing continuum by Spring 2026.

Timeline





Themes and Supporting Data

JOB DEMAND EXCEEDS HOME PRODUCTION

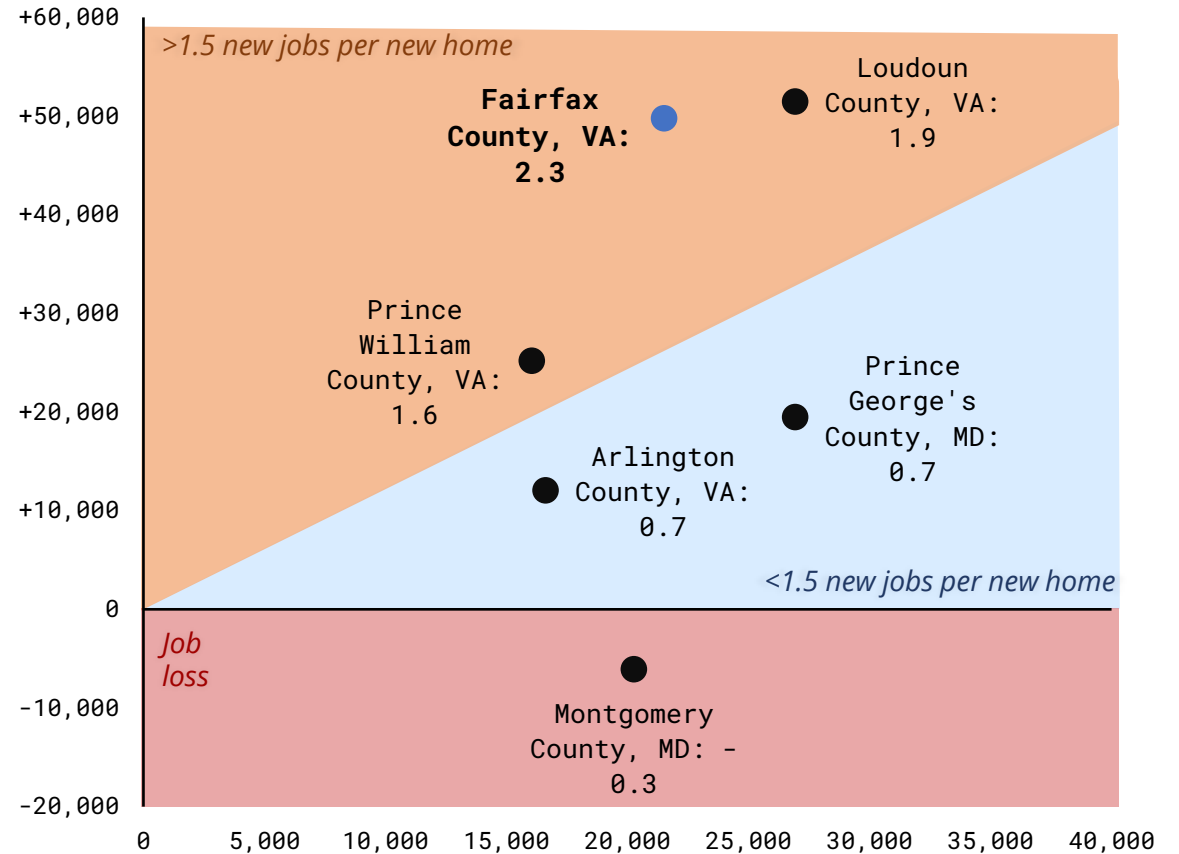
New housing supply lags job and population growth. Jobs-to-home ratio of 2.3 meaning fewer employees able to live where they work.

Rental supply grew just 5% between 2013 and 2023, roughly half the regional pace. Most new rentals in buildings with 50+ units, having increased 63% since 2010 (15,000 units).

New homeownership supply favors smaller, multifamily options. Townhome and condo are higher share of new units.

Future housing needs will far outpace current production trends. By 2035 we're projected to add 62,000 workers and between 45,000 and 184,000 new residents. A healthy market demands 41,000 – 95,000 new units.

Net Jobs per New Home Permitted, 2015-2025



Sources: U.S. Bureau of Labor Statistics, Quarterly Census of Employment and Wages (QCEW), June 2025 net of June 2015, and U.S. Department of Housing and Urban Development (HUD), State of the Cities Data Systems (SOCDS), Building Permits Survey (BPS), new housing unit permits from July 2015 through June 2025.

Note: BPS data accounts for all housing permits.



Themes and Supporting Data

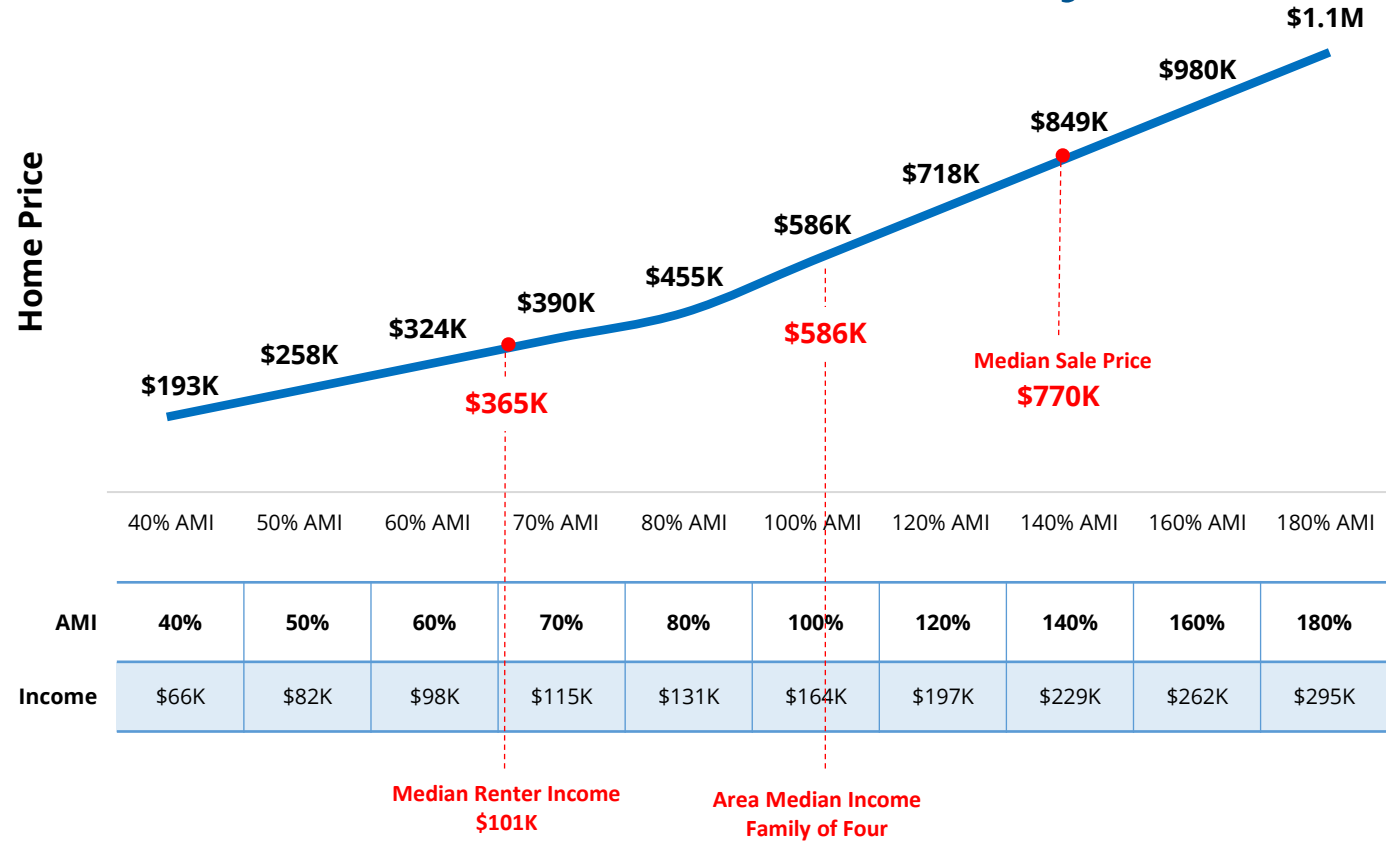
RISING HOME PRICES CONSTRAINED PURCHASING POWER

In 2024, the median home sales price in Fairfax County was **\$770,000**. A family of four would need a household income of at least **\$230K** to afford the median home.

By contrast, the median income of a family of four who rents is **\$101K**. This household could only afford a home priced **\$365K**.

Of all sales in Fairfax County since 2022, the median renter household of four can only afford to purchase less than 20% of all homes sold.

What is the maximum home price a 4-person household can afford in Fairfax County?



Source: Fairfax County WDU Program Income Limits, HR&A Calculation
 Maximum affordable home price rounded to nearest hundredth. Price assumes 10% downpayment, 1.12% property tax rate, and 30-year fixed mortgage at 6.35%. Assumes \$108/month in homeowners' insurance and with a \$400/month condo/HOA fee based on comparable homes listed on Zillow as of September 2025. Home burden ratio of 35% in alignment with Affordable Dwelling Unit program terms.



Themes and Supporting Data

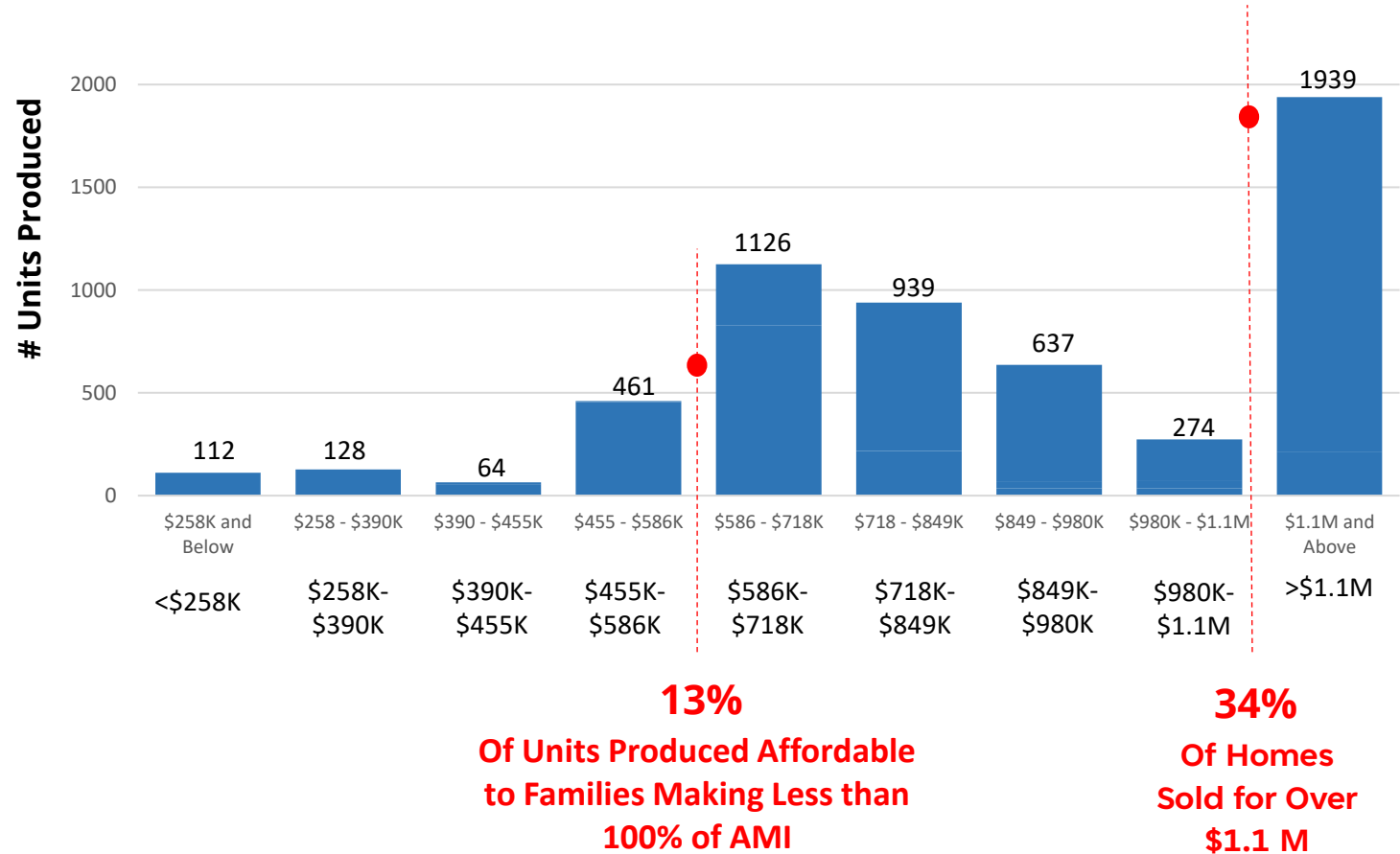
NEW HOME CONSTRUCTION NOT MEETING KEY DEMAND AREAS

Only 13% of units produced were **affordable** to families making less than 100% AMI.

More than 1/3 of all new homes sold for **over \$1.1M**.

Every single-family detached home built in 2025 sold for **more than \$1.1M**.

2021-2025 New Homes Production: 5,680 Purchase Price Point Information



Source: Fairfax County Department of Tax Administration – Sale of New Homes 2021-2025



Themes and Supporting Data

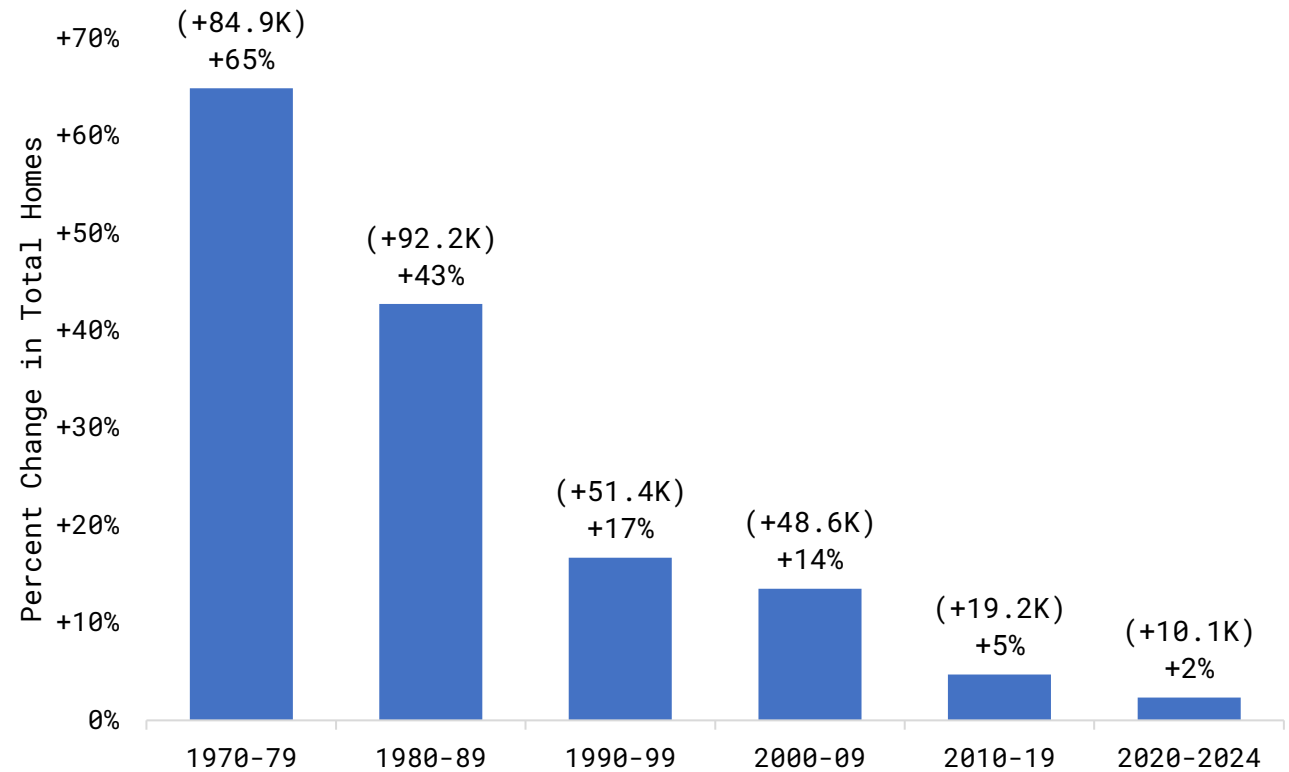
PACE OF BUILDING HAS COLLAPSED

Building many new homes helped fuel Fairfax County's rapid economic growth in the 1970s and 1980s. But the County has produced far less housing in the decades since then.

As measured by the percent change in total homes decade-over-decade, **the rate of new construction fell by more than half from the 1980s to 1990s—and fell by more than half again during the Great Recession.**

The slowdown in home construction, even since the 1990s and 2000s, hinders Fairfax County's continued economic growth.

Home Supply Growth by Decade



Sources: Decadal census data accessed from IPUMS NHGIS for 1970-2020, and Address Count Listing File data from U.S. Census Bureau for 2024.

Note: Data accounts for all housing units, excluding group quarters. The pace of housing supply growth for 2020-24 is about on par with the previous decade (2010-19).



Themes and Supporting Data

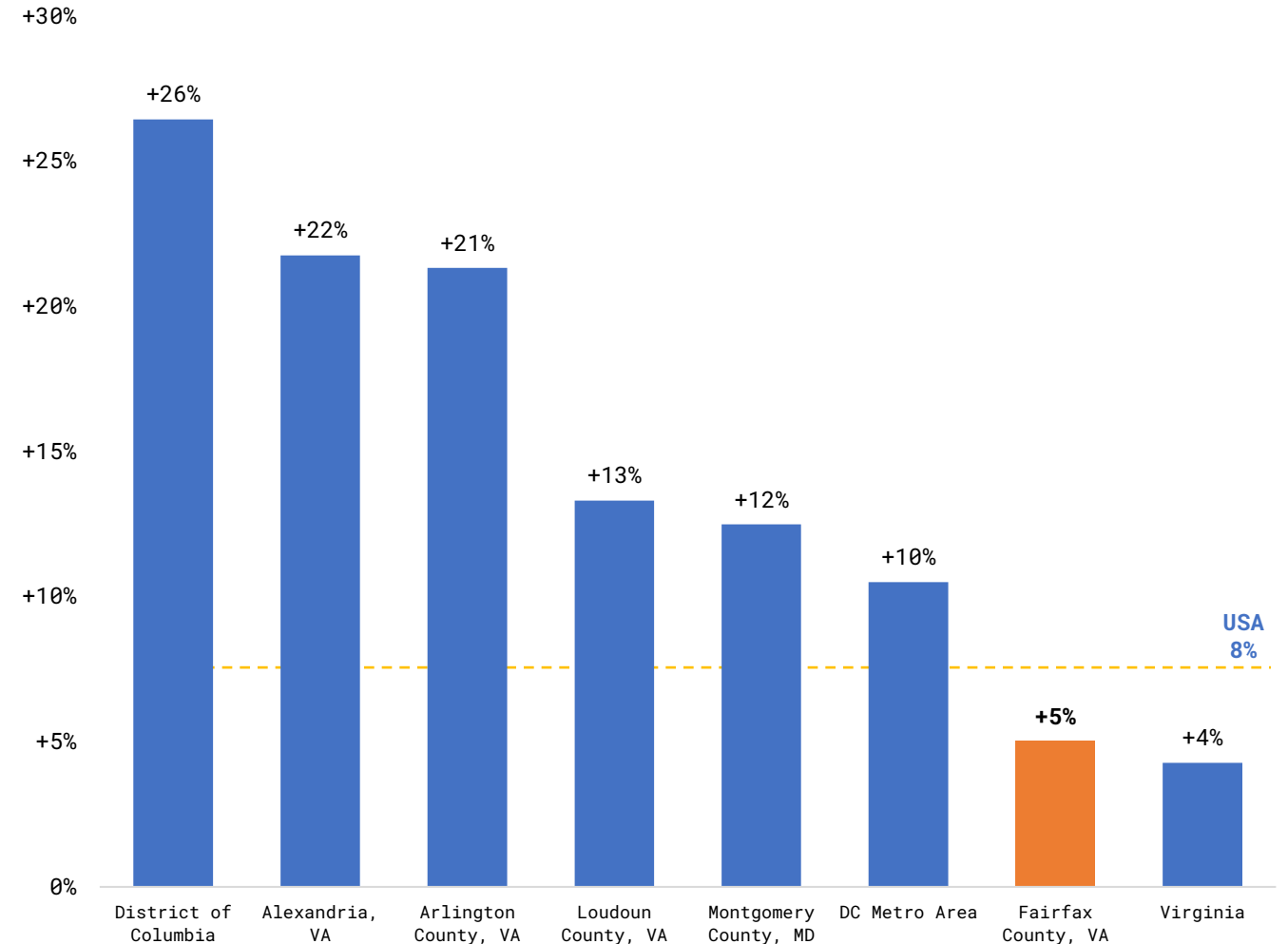
RENTAL HOUSING PRODUCTION LAGS REGIONAL NEIGHBORS

Fairfax County's new rental housing production has lagged behind its peers, contributing to higher rents.

Between 2013 to 2023, **Fairfax rental housing supply grew only 5%**. By comparison, Arlington County's renter-occupied home supply grew by 21% and D.C.'s grew by 26%.

A low rate of new renter homes has ripple effects across the housing market, leading to surging rental costs for fewer units which only higher-income households can afford.

Percent Change in Renter-Occupied Homes, 2013-2023



Source: U.S. Census Bureau, American Community Survey (ACS), 1-Year Estimates.



Themes and Supporting Data

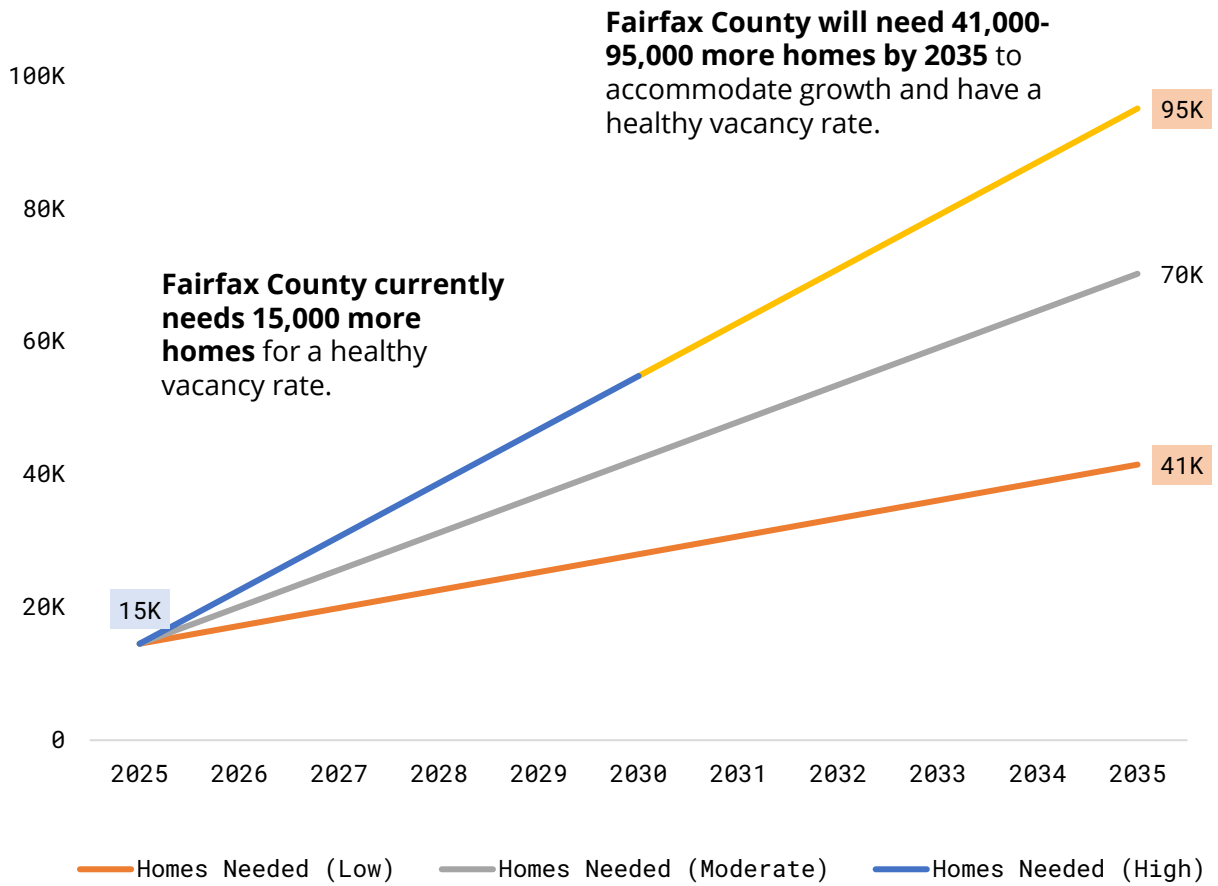
FAIRFAX COUNTY WILL NEED 41K-95K NEW HOMES BY 2035

A healthy housing market needs about 5% of all homes to be vacant and available. These available homes allow households to move for jobs, start families, or otherwise relocate. At present, **Fairfax County needs 15K more homes to achieve a healthy 5% vacancy rate.**

To account for projected demand from new households, **Fairfax County will require 41K-95K total new homes by 2035**, including current need and accounting for a 5% target vacancy rate for projected future households.

Production must double to meet needs.

New Homes Needed by 2035



Sources: HR&A analysis of American Community Survey (ACS) 1-Year Estimates and HR&A household projections based on analysis of Cooper Center and HR&A population projections.

Note: Assumes a target vacant availability rate of 5%. The new homes needed are the additional homes needed so that vacant and available (i.e., for rent and for sale) homes equal 5% of the sum of occupied homes (i.e., total households or projected total households) plus vacant and available homes.



Themes from the Development Community

County policies limit housing supply.

County policies drive higher affordable housing costs.

Development review is fragmented and lacks sufficient internal and external coordination.

The County should work to simplify requirements and improve transparency.

The County needs more tools / options for financing affordable housing.

Foster more collaborative staff-developer-Planning Commission-Board culture - oriented to “yes, if...” and not “no, because...”

1

County policy considerations

2

County policies to offset affordable housing costs

3

Improving cross- agency/department development review

4

Simplified requirements and improved transparency

5

Affordable housing tool options

6

**Foster more
collaborative all-parties
culture oriented to
“yes, if...” and not “no,
because...”**

7

Partnership Opportunities

Next Steps



Estimated Timeline and Deliverables

March 19	Development Community Engagement and Survey Distribution— to development stakeholders and County SMEs
April 2	Survey Closes
April (TBD)	Publish Action Plan Report and Supporting Information Online
April (TBD)	Conduct final briefings with leadership and make any final refinements to content
May 12	Final Action Plan Report presented to Economic Competitiveness, Land Use Policy, Housing Committee