

DULLES REGION DATA BOOK

Prepared by

Yu Jin Jung, Ward Kay
Center for Regional Analysis
School of Public Policy
George Mason University

Prepared for:

Dulles Regional Chamber of Commerce

April 2010

Table of Contents

Dulles Region Defined.....	1
Dulles Region: Map of Zip Codes	2
Dulles Region: 2000 Census Data	3
Establishment and Employment Trends	10
Existing Home Sales Trends, 2000-2009.....	13
Commercial Real Estate, 2009.....	15
Growth Forecasts to 2030	16
Gross Area Product, 2000-2009.....	18
Dulles Airport Economic Activity, 2000-2009.....	19
Dulles Regional Chamber of Commerce Survey, 2010.....	20

Dulles Region Defined

The Dulles Regional Chamber of Commerce defines its region as centered on the new control tower at Dulles International Airport and extends roughly 8 miles in all directions. This area includes communities in both Loudoun and Fairfax counties. The communities include Herndon, Reston, Chantilly, Sterling, Ashburn, Arcola, South Riding, Sully, Oakton, and parts of Centreville.

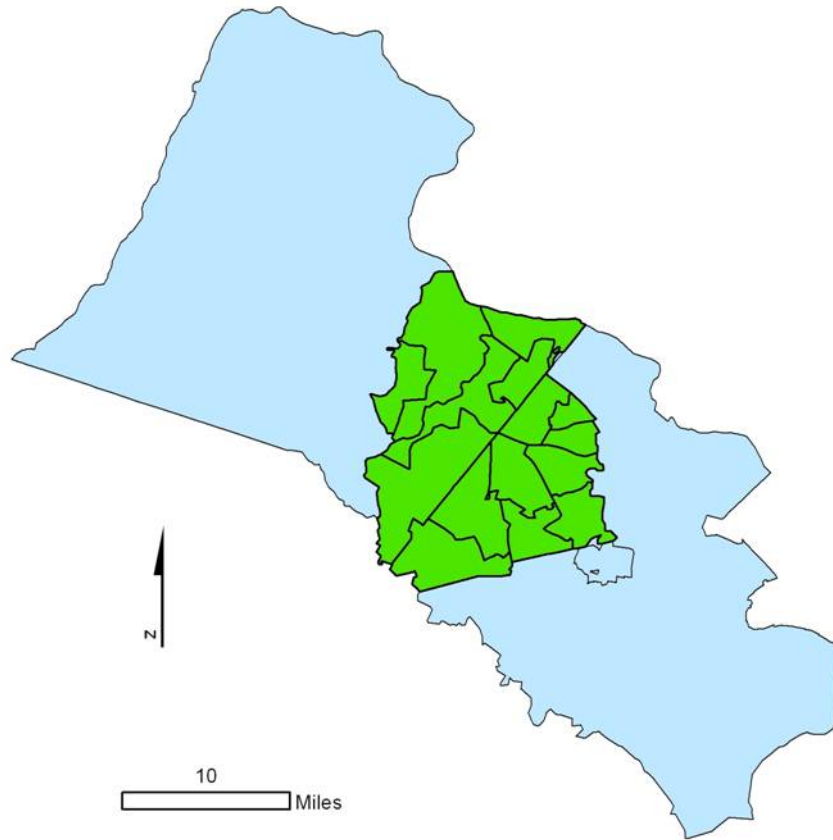
Most of these communities are unincorporated and therefore many official statistics are not reported in a way that allows comparable statistics for the Dulles Region. This data book attempts to fill in the gaps by collating the available data into one source.

There are data available at the zip code level. While the zip codes provide a nice overlay for most of the Dulles Region, some zip codes have only a portion of their area within the Dulles Region. Two of these zip codes (20121 and 22030) have a large portion of their businesses in the Dulles Region, but only a small fraction of their residential area. For this data book, the residential portion of their zip codes is not included and a portion of their economic data was added to the region's total.

The zip codes included in the data are:

Name	Zip
Chantilly	20151
Fairfax	22033
Herndon	20170
Herndon (PO BOX)	20172
Herndon/Oak Hill	20171
Oakton	22124
Reston/Herndon	20190
Reston/Herndon	20191
Reston/Herndon	20194
Reston/Herndon (PO BOX)	20195
Centreville/Sully Station	20120
Ashburn	20147
Ashburn/Arcola/Brambleton/Broadlands	20148
Chantilly/South Riding	20152
Sterling	20164
Sterling/Dulles	20166
Sterling/Potomac Falls	20165

Dulles Region: Map of Zip Codes Fairfax and Loudoun Counties



Dulles Region – 2000 Census Data

Total population	332,054	Percent
SEX AND AGE		
Male	164,933	49.7%
Female	167,121	50.3%
Under 5 years	28,427	8.6%
5 to 9 years	27,565	8.3%
10 to 14 years	24,547	7.4%
15 to 19 years	19,476	5.9%
20 to 24 years	16,696	5.0%
25 to 34 years	59,730	18.0%
35 to 44 years	67,462	20.3%
45 to 54 years	49,245	14.8%
55 to 59 years	15,050	4.5%
60 to 64 years	8,595	2.6%
65 to 74 years	9,132	2.8%
75 to 84 years	4,590	1.4%
85 years and over	1,539	0.5%
Median age (years)	33.54	
18 years and over	238,118	71.7%
Male	116,955	35.2%
Female	121,163	36.5%
21 years and over	229,386	69.1%
62 years and over	19,798	6.0%
65 years and over	15,261	4.6%
Male	6,413	1.9%
Female	8,848	2.7%

Source: 2000 Census, Bureau of the Census

RACE		Percent
One race	321,864	96.9%
White	250,494	75.4%
Black or African American	23,166	7.0%
American Indian and Alaska Native	783	0.2%
Asian	35,733	10.8%
Asian Indian	10,533	3.2%
Chinese	5,734	1.7%
Filipino	3,277	1.0%
Japanese	746	0.2%
Korean	5,110	1.5%
Vietnamese	5,059	1.5%
Other Asian 1	5,274	1.6%
Native Hawaiian and Other Pacific Islander	195	0.1%
Native Hawaiian	55	0.0%
Guamanian or Chamorro	69	0.0%
Samoan	24	0.0%
Other Pacific Islander 2	47	0.0%
Some other race	11,493	3.5%
Two or more races	10,190	3.1%
<i>Race alone or in combination with one or more other races 3</i>		
White	258,924	78.0%
Black or African American	25,647	7.7%
American Indian and Alaska Native	2,062	0.6%
Asian	39,955	12.0%
Native Hawaiian and Other Pacific Islander	550	0.2%
Some other race	15,687	4.7%
HISPANIC OR LATINO AND RACE		
Total population	332,054	100.0%
Hispanic or Latino (of any race)	28,792	8.7%
Mexican	3,786	1.1%
Puerto Rican	2,126	0.6%
Cuban	752	0.2%
Other Hispanic or Latino	22,128	6.7%
Not Hispanic or Latino	303,262	91.3%
White alone	235,431	70.9%

Source: 2000 Census, Bureau of the Census

NATIVITY AND PLACE OF BIRTH		Percent
Total population	332,245	
Native	268,246	80.7%
Born in United States	260,808	78.5%
State of residence	89,276	26.9%
Different state	171,532	51.6%
Born outside United States	7,438	2.2%
Foreign born	63,999	19.3%
Entered 1990 to March 2000	31,344	9.4%
Naturalized citizen	26,215	7.9%
Not a citizen	37,784	11.4%
REGION OF BIRTH OF FOREIGN BORN		
Total (excluding born at sea)	63,991	100.0%
Europe	7,345	11.5%
Asia	32,577	50.9%
Africa	3,430	5.4%
Oceania	347	0.5%
Latin America	18,716	29.2%
Northern America	1,576	2.5%
LANGUAGE SPOKEN AT HOME		
Population 5 years and over	304,217	100.0%
English only	231,748	76.2%
Language other than English	72,469	23.8%
Speak English less than "very well"	28,407	9.3%
Spanish	25,897	8.5%
Speak English less than "very well"	13,078	4.3%
Other Indo-European languages	23,099	7.6%
Speak English less than "very well"	6,105	2.0%
Asian and Pacific Island languages	19,661	6.5%
Speak English less than "very well"	8,160	2.7%

Source: 2000 Census, Bureau of the Census

SCHOOL ENROLLMENT		
Population 3 years and over enrolled in school	93,362	100.0%
Nursery school, preschool	8,872	9.5%
Kindergarten	5,618	6.0%
Elementary school (grades 1-8)	41,680	44.6%
High school (grades 9-12)	18,151	19.4%
College or graduate school	19,041	20.4%
EDUCATIONAL ATTAINMENT		
Population 25 years and over	216,360	100.0%
Less than 9th grade	5,966	2.8%
9th to 12th grade, no diploma	8,147	3.8%
High school graduate (includes equivalency)	28,261	13.1%
Some college, no degree	38,589	17.8%
Associate degree	12,809	5.9%
Bachelor's degree	75,315	34.8%
Graduate or professional degree	47,273	21.8%
Percent high school graduate or higher	93.97	
Percent bachelor's degree or higher	57.51	
MARITAL STATUS		
Population 15 years and over	251,914	100.0%
Never married	62,621	24.9%
Now married, except separated	157,835	62.7%
Separated	5,091	2.0%
Widowed	6,916	2.7%
Female	5,834	2.3%
Divorced	19,451	7.7%
Female	11,962	4.7%

Source: 2000 Census, Bureau of the Census

HOUSEHOLDS BY TYPE		
Total households	118,582	100.0%
Family households (families)	85,848	72.4%
With own children under 18 years	48,901	41.2%
Married-couple family	72,804	61.4%
With own children under 18 years	41,271	34.8%
Female householder, no husband present	9,354	7.9%
With own children under 18 years	5,886	5.0%
Nonfamily households	32,734	27.6%
Householder living alone	23,837	20.1%
Householder 65 years and over	3,518	3.0%
Households with individuals under 18 years	51,078	43.1%
Households with individuals 65 years and over	11,326	9.6%
Average household size	2.78	
Average family size	3.22	

Source: 2000 Census, Bureau of the Census

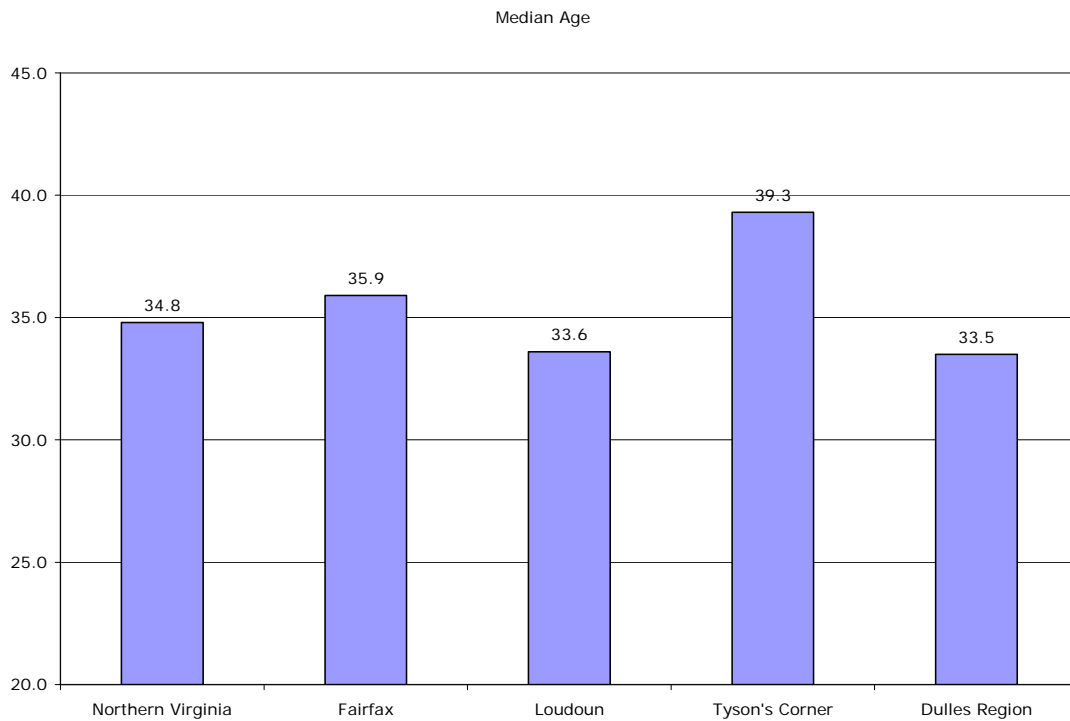
HOUSING OCCUPANCY		
Total housing units	122,210	100.0%
Occupied housing units	118,582	97.0%
Vacant housing units	3,628	3.0%
For seasonal, recreational, or occasional use	798	0.7%
Homeowner vacancy rate (percent)	0.86	
Rental vacancy rate (percent)	3.36	
HOUSING TENURE		
Occupied housing units	118,582	100.0%
Owner-occupied housing units	89,224	75.2%
Renter-occupied housing units	29,358	24.8%
Average household size of owner-occupied unit	2.85	
Average household size of renter-occupied unit	2.54	

Source: 2000 Census, Bureau of the Census

Total housing units	122,175	100.0%
UNITS IN STRUCTURE		
1-unit, detached	56,451	46.2%
1-unit, attached	37,421	30.6%
2 units	251	0.2%
3 or 4 units	1,377	1.1%
5 to 9 units	7,020	5.7%
10 to 19 units	10,783	8.8%
20 or more units	8,191	6.7%
Mobile home	659	0.5%
Boat, RV, van, etc.	22	0.0%
YEAR STRUCTURE BUILT		
1999 to March 2000	8,419	6.9%
1995 to 1998	20,715	17.0%
1990 to 1994	19,422	15.9%
1980 to 1989	37,805	30.9%
1970 to 1979	24,724	20.2%
1960 to 1969	8,544	7.0%
1940 to 1959	1,928	1.6%
1939 or earlier	618	0.5%
ROOMS		
1 room	929	0.8%
2 rooms	3,757	3.1%
3 rooms	8,586	7.0%
4 rooms	10,346	8.5%
5 rooms	13,443	11.0%
6 rooms	14,690	12.0%
7 rooms	17,386	14.2%
8 rooms	20,182	16.5%
9 or more rooms	32,856	26.9%
Median (rooms)	6.99	

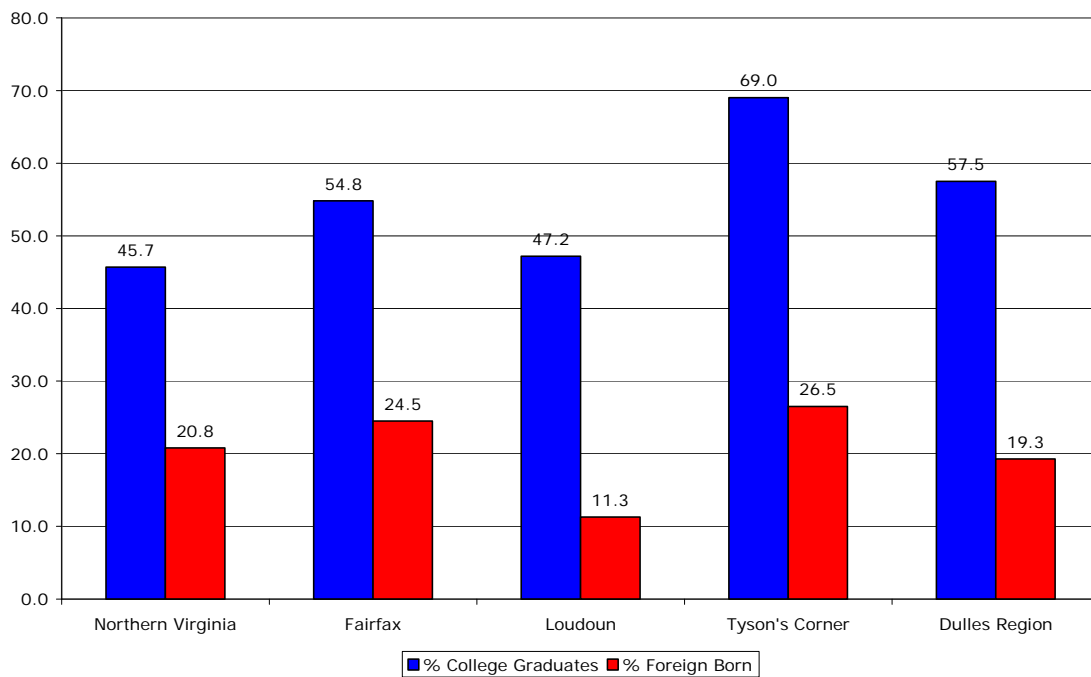
Source: 2000 Census, Bureau of the Census

Comparison of Selected Census Data, 2000



Source: 2000 Census, Bureau of the Census

Percent College Grad & Percent Foreign Born



Source: 2000 Census, Bureau of the Census

Dulles Region: Establishment and Employment Trends, 2000-2007

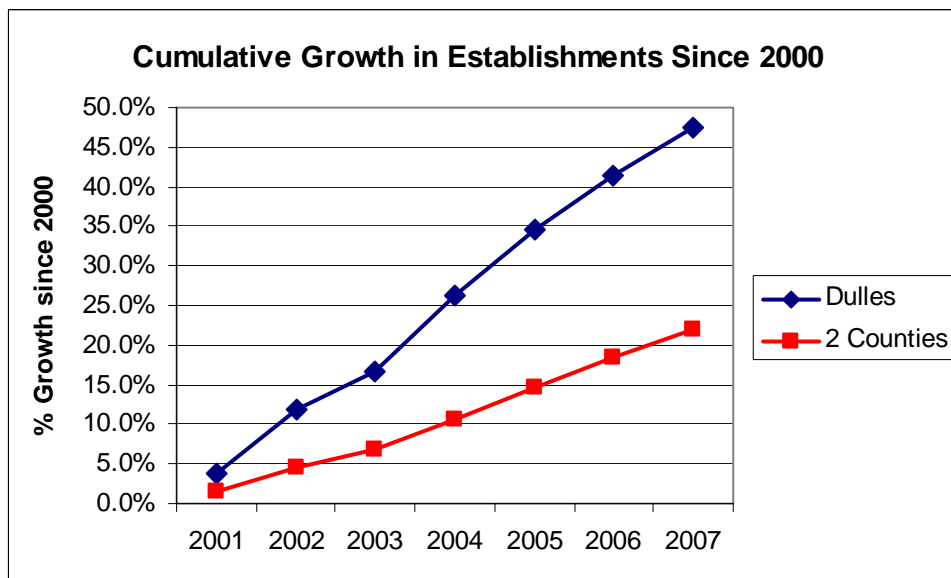
(note: government establishments & employees are not included in data)

	Establishments	Employees	Annual payroll in \$1,000
2000	9,821	218,809	12,038,212
2001	10,194	228,255	12,119,126
2002	10,983	215,747	11,512,912
2003	11,459	237,171	13,363,895
2004	12,406	263,808	15,404,655
2005	13,209	274,607	17,073,169
2006	13,886	290,341	18,410,677
2007	14,495	302,400	20,164,947

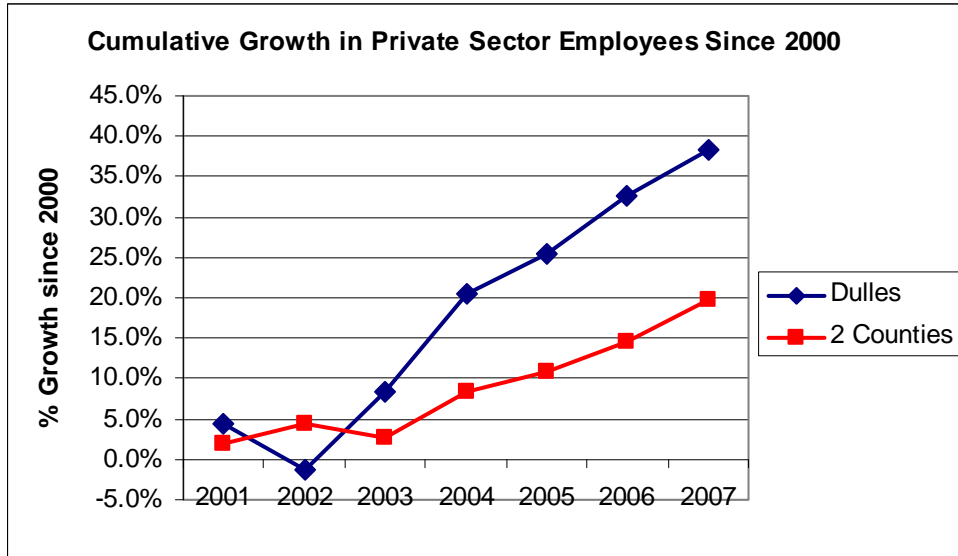
Source: County Business Patterns, U.S. Census Bureau

Percent Growth Year-to-Year			
	Establishments	Employees	Annual payroll in \$1,000
2001	3.8%	4.3%	0.7%
2002	7.7%	-5.5%	-5.0%
2003	4.3%	9.9%	16.1%
2004	8.3%	11.2%	15.3%
2005	6.5%	4.1%	10.8%
2006	5.1%	5.7%	7.8%
2007	4.4%	4.2%	9.5%

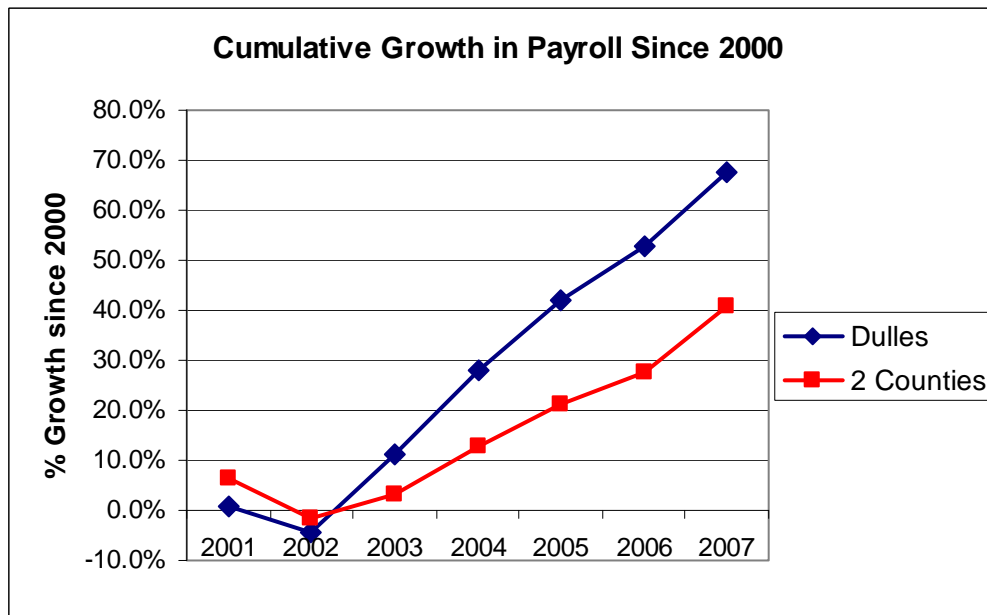
Source: County Business Patterns, U.S. Census Bureau



Source: County Business Patterns, U.S. Census Bureau
 Note: "2 Counties" are the combined Fairfax and Loudoun Counties total



Source: County Business Patterns, U.S. Census Bureau
 Note: "2 Counties" are the combined Fairfax and Loudoun Counties total



Source: County Business Patterns, U.S. Census Bureau
 Note: "2 Counties" are the combined Fairfax and Loudoun Counties total

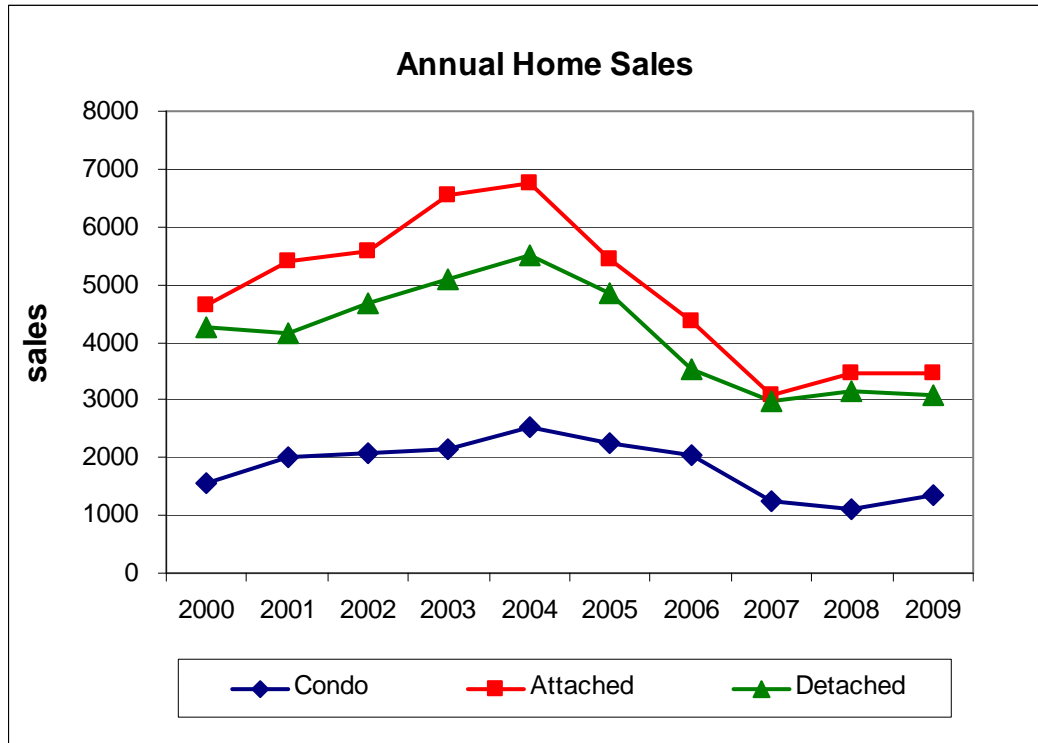
Dulles Region: Establishments by Industry, 2007

(note: government establishments are not included)

Industry Code		Establishments
-----	Total	12,803
11----	Forestry, fishing, hunting, and agriculture	4
21----	Mining	5
22----	Utilities	7
23----	Construction	1,051
31----	Manufacturing	223
42----	Wholesale trade	521
44----	Retail trade	1,225
48----	Transportation & warehousing	290
51----	Information	524
52----	Finance & insurance	660
53----	Real estate & rental & leasing	556
54----	Professional, scientific & technical service	3,812
55----	Management of companies & enterprises	135
56----	Admin, support, waste mgt, remediation service	723
61----	Educational services	201
62----	Health care and social assistance	930
71----	Arts, entertainment & recreation	149
72----	Accommodation & food services	904
81----	Other services (except public administration)	879
99----	Unclassified establishments	3

Source: County Business Patterns, U.S. Census Bureau

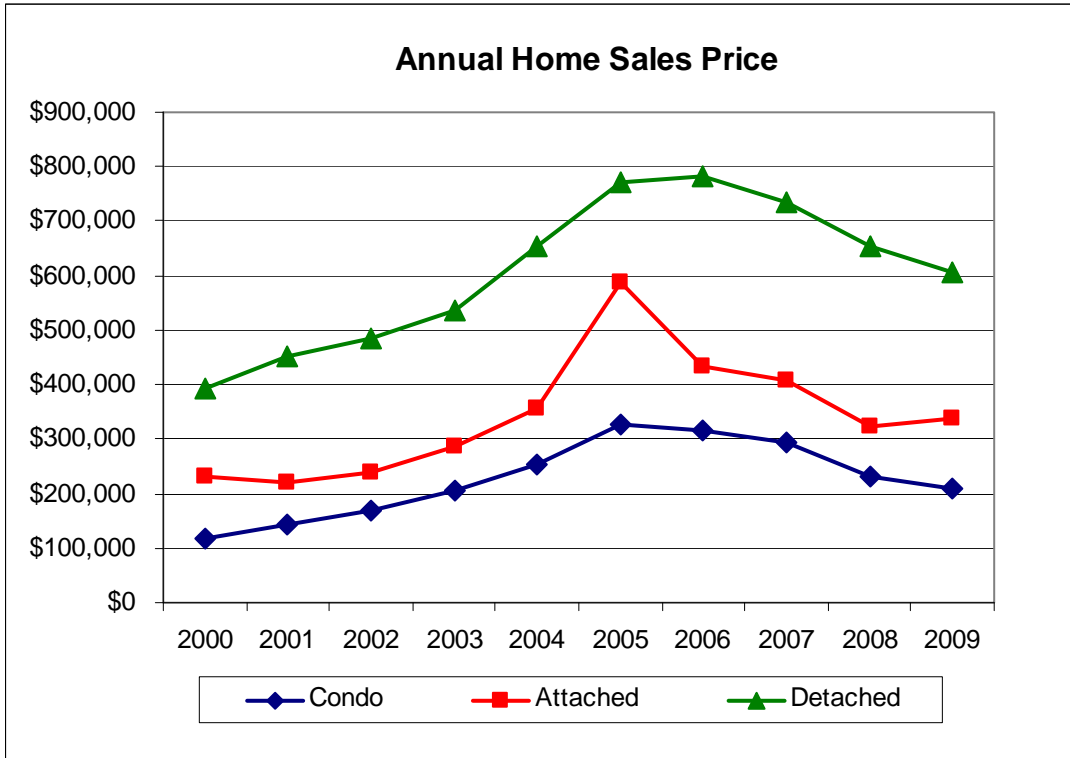
Dulles Region: Existing Home Sales Trends, 2000-2009



Source: Metropolitan Regional Information Systems, Inc.

	Sales		
	Condo	Attached	Detached
2000	1,566	4,652	4,249
2001	2,025	5,394	4,173
2002	2,090	5,579	4,673
2003	2,156	6,535	5,076
2004	2,537	6,769	5,503
2005	2,258	5,447	4,850
2006	2,058	4,359	3,545
2007	1,244	3,083	2,971
2008	1,116	3,459	3,137
2009	1,337	3,447	3,100

Source: Metropolitan Regional Information Systems, Inc.



Source: Metropolitan Regional Information Systems, Inc.

	Average Sales Price		
	Condo	Attached	Detached
2000	\$117,585	\$232,436	\$391,397
2001	\$142,695	\$221,261	\$451,686
2002	\$169,303	\$238,240	\$483,762
2003	\$204,598	\$287,072	\$537,286
2004	\$254,461	\$357,765	\$653,380
2005	\$326,388	\$586,065	\$772,779
2006	\$316,220	\$433,626	\$783,514
2007	\$294,912	\$406,301	\$734,625
2008	\$230,897	\$323,109	\$653,035
2009	\$209,578	\$338,140	\$604,316

Source: Metropolitan Regional Information Systems, Inc.

Dulles Region: Commercial Real Estate, 2009

Total

	Structure Type			Total Gross Floor Area
	Industrial	Office	Retail	
Fairfax County	24,894,633	109,203,643	39,724,345	173,822,621
Loudoun County	13,073,401	16,495,964	14,962,930	44,532,295
2-County	37,968,034	125,699,607	54,687,275	218,354,916
Dulles Region	17,680,319	63,010,711	23,130,652	103,821,682
Rest of 2-county	20,287,715	62,688,896	31,556,623	114,533,234
% of 2-county	46.57%	50.13%	42.30%	47.55%
Source: CoStar				
Note: The radius of the Dulles Region has been redefined from 7 in 2008 to 8.5 in 2010				

Occupied

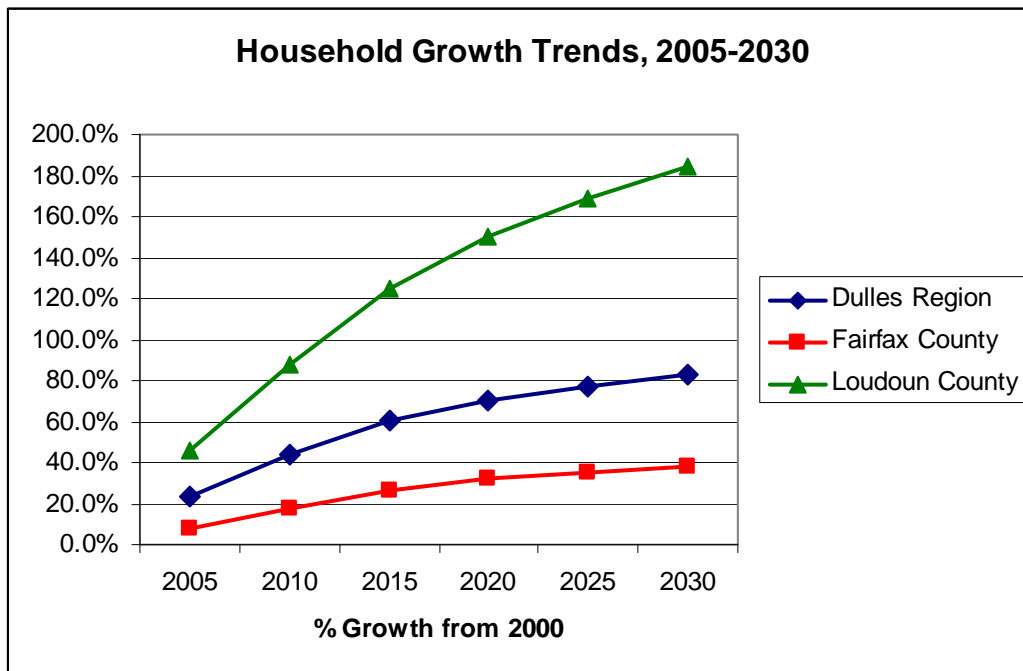
	Structure Type			Total Gross Floor Area
	Industrial	Office	Retail	
Fairfax County	22,364,636	91,855,447	38,016,786	152,236,869
Loudoun County	11,191,448	13,584,547	13,916,105	38,692,100
2-County	33,556,084	105,439,994	51,932,891	190,928,969
Dulles Region	14,961,136	51,636,946	22,030,124	88,628,206
DR Vacancy Rate	15%	18%	5%	
Rest of 2-county	18,594,948	53,803,048	29,902,767	102,300,763
% of 2-county	44.59%	48.97%	42.42%	46.42%
Source: CoStar				
Note: The radius of the Dulles Region has been redefined from 7 in 2008 to 8.5 in 2010				

Dulles Region: Population, Household and Employment Trends, 2005-2030

Dulles Region: Population and Households, 2005-2030

	Households	% Growth from 2000	Population	% Growth from 2000
2005	148,885	23.5%	414,581	21.2%
2010	173,056	43.5%	478,862	40.0%
2015	193,522	60.5%	531,008	55.2%
2020	205,780	70.7%	566,763	65.7%
2025	213,896	77.4%	588,607	72.1%
2030	220,304	82.7%	605,682	77.1%

Source: Metropolitan Washington Council of Governments

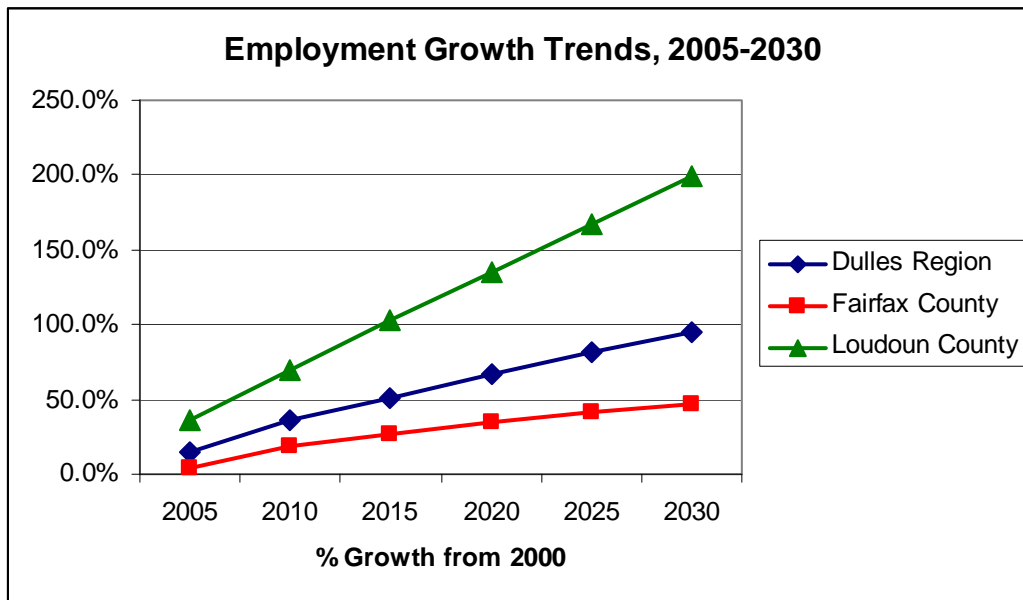


Source: Metropolitan Washington Council of Governments

Dulles Region: Employment, 2005-2030

	Employment	% Growth from 2000
2005	289,738	14.2%
2010	345,078	36.0%
2015	384,096	51.4%
2020	422,022	66.3%
2025	459,196	81.0%
2030	493,500	94.5%

Source: Metropolitan Washington Council of Governments



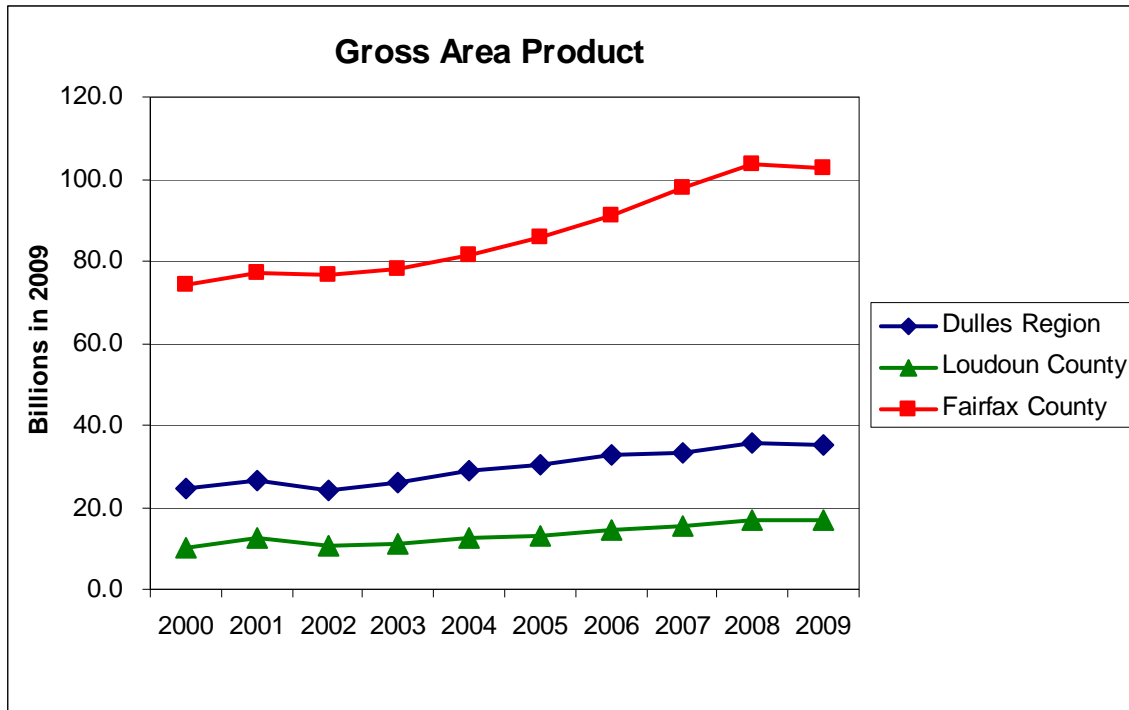
Source: Metropolitan Washington Council of Governments

Dulles Region: Gross Area Product

(in Billions of 2009 Dollars)

	Dulles Region	Loudoun County	Fairfax County
2000	\$ 24.6	\$ 10.2	\$ 74.0
2001	26.7	12.4	76.9
2002	24.3	10.7	76.7
2003	26.1	11.2	78.1
2004	29.0	12.4	81.6
2005	30.5	13.1	85.6
2006	33.0	14.3	91.1
2007	33.3	15.4	97.6
2008	35.6	17.0	103.5
2009	35.3	16.8	102.5

Source: Center for Regional Analysis, School of Public Policy, George Mason University



Source: Center for Regional Analysis, School of Public Policy, George Mason University

Dulles Airport Economic Activity, 2000-2009

YEAR	TOTAL	PASSENGERS		
	OPS	DOM	INT'L	TOTAL
2000	456,436	15,872,660	4,232,033	20,104,693
2001	396,886	14,020,710	3,981,609	18,002,319
2002	372,636	13,145,607	4,089,556	17,235,163
2003	335,397	12,928,047	4,022,334	16,950,381
2004	469,634	18,213,886	4,654,996	22,868,852
2005	509,652	22,128,747	4,923,371	27,052,118
2006	379,571	17,787,488	5,232,874	23,020,362
2007	382,943	18,792,173	5,945,355	24,737,528
2008	360,292	17,638,090	6,238,690	23,876,780
2009	340,367	16,964,655	6,248,686	23,213,341

Source: Metropolitan Washington Airports Authority

YEAR	MAIL (000 LBS)			FREIGHT (000 LBS)		
	DOM	INT'L	TOTAL	DOM	INT'L	TOTAL
2000	114,584.8	224,89.9	137,074.7	416,761.5	292,557.4	709,318.9
2001	75,327.3	18,869.6	94,196.9	375,224.8	260,244.0	635,468.8
2002	26,792.7	19,223.2	46,015.9	386,888.3	283,438.2	670,326.5
2003	24,486.3	14,839.3	39,325.6	329,480.1	260,395.7	589,875.8
2004	22,962.1	8,741.8	31,703.9	339,705.2	313,632.8	653,338.0
2005	22,496.4	8,667.0	31,163.4	319,339.1	317,639.4	636,978.5
2006	14,563.2	12,855.1	27,418.3	324,806.2	421,345.6	746,151.8
2007	6,681.8	16,435.4	23,117.2	346,930.5	420,706.8	767,637.3
2008	11,745.1	17,449.6	29,194.7	300,134.6	406,798.2	706,932.8
2009	9,272.3	12,960.9	22,233.2	261,650.0	361,672.8	623,322.8

Source: Metropolitan Washington Airports Authority

Dulles Regional Chamber of Commerce Survey, 2010

Summary of Business Conditions, 2010 (percent response)

Business Condition	2009*	2010**
Increase in Full- and Part-time Employees	23%	45%
New Investment: New Equipment, Remodeling Expansion, or New Facilities	25%	15%
Revenues: Equal to Previous Year or Higher	55%	70%
Profitability	63%	75%

Source: Center for Regional Analysis, School of Public Policy, George Mason University

* actual

** projected

Summary Profile

Characteristic	Greatest Percentage
Type of Business	Professional Services (49%)
Number of Employees	Less than 10 (61%)
Year Business Established	1990 or more recently (57%)
Originally Founded in Dulles Area	Yes (61%)

Source: Center for Regional Analysis, School of Public Policy, George Mason University

Dulles Area's Strongest Business Assets and Critical Weaknesses

Assets	Weaknesses
Dulles Airport	Traffic Congestion*
Federal Government	Lack of Public Transit
Quality of Workforce	Taxes and High Operating Costs
Demographics of Customers	Housing Affordability
Strength of NVA Economy	

Source: Center for Regional Analysis, School of Public Policy, George Mason University

*cited by 60% of the respondents