Growing Up and Aging in Place:

Generational Demographics in the Washington, DC Region

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Executive Summary

The Washington, DC region has been a place where educated people from across the country have come for government-related work – both as government employees and as contractors - throughout the past century. The growth of government spending over the past 50 years has fueled massive job, population and urban growth in the region. New residents arrived to the region to work for government, nonprofits, think tanks, defense contractors, lobbying groups, and international aid organizations. Not only have new people come each year, but they have remained to raise families and retire. However, this concurrent aging of the population and the growth of in-migration from millennials (generation Y) and generation X pose challenges for planners, developers, community service providers, and small businesses.

The demand is rising for rental housing at the core by young new residents at the same time that older residents who are starting families demand different housing products and communities geared toward raising children. The aging of the baby boom generation also presents unique problems for planners and community service providers in the communities in which they currently live. Suburban jurisdictions with large numbers of aging homeowners will likely see a growing demand for smaller units nearby where they can downsize without leaving. Meanwhile the core jurisdictions where baby boomer poverty is more prevalent may have to preserve or produce subsidized senior housing to accommodate their changing populations. While the growth in the population over 65 is unprecedented, generation X remains the largest cohort in the region due to the in-migration of new residents.

This research examines the demographic profiles of the millennial generation, generation X, and the baby boom to better understand how the region will look in the future and what their demands may be for housing, services, and community. There is significant debate about the exact years for the beginning and end of each generational cohort. However, for the purposes of this study, we have defined generation Y, the echo boom, or millennials as those born between 1985 and 2004; generation X as those between 1965 and 1984; and baby boomers as those born between 1945 and 1964[1].

Summary of Key Findings

Between 2010 and 2030, the region is expected to grow by almost 2 million residents – with the number of people over the age of 65 nearly doubling. The region is changing dramatically from a place with largely white, affluent families in suburbs and poor and African American region in which each jurisdiction contains a diverse population. The District, Arlington, and Alexandria are now places where young and affluent newcomers are moving and staying as the older populations age-in-place.
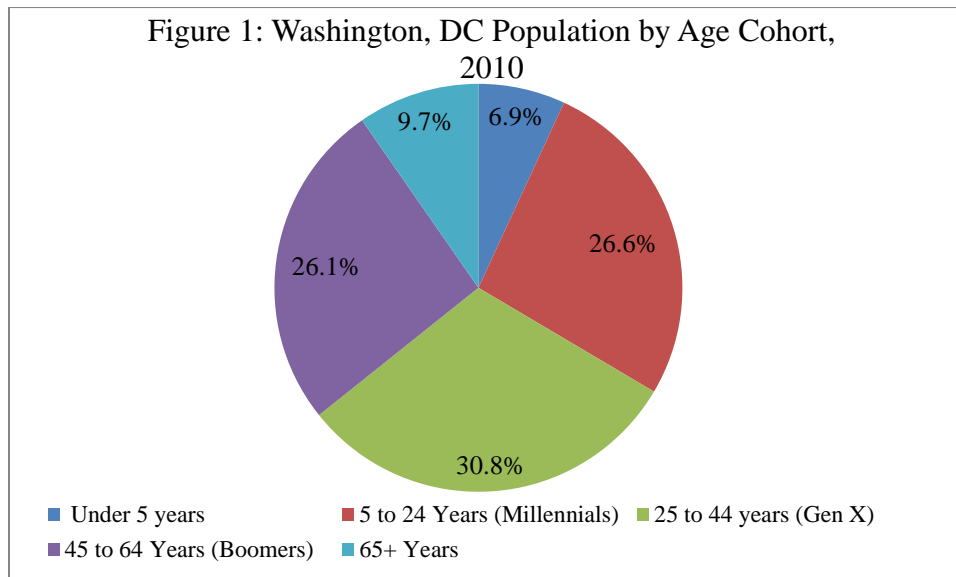
Key Findings

- Generation X is the most ethnically diverse generation both across and within jurisdictions. Though all generations are disproportionately white in the Virginia jurisdictions, generation X populations are more diverse – particularly in the District and the Maryland suburbs. This reflects the historic segregation by race and class between the District and the suburbs throughout much of the 20th Century.

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[1] There is significant debate about the exact years for the beginning and end of each generational cohort. However, for the purposes of this study, we have selected the definitions provided by the Harvard Joint Centers for Housing Studies: Masnik, George, "Defining the Generations." Housing Perspectives. November 28, 2012. http://housingperspectives.blogspot.com/2012/11/defining-generations.html

- Baby boomers across the region are more segregated by race and class than generation X. In the District, they represent the highest poverty rates in the city. Meanwhile in the rest of the region they are the least likely to be poor. They are also overwhelmingly white in the suburbs and African American in the District.

- The older (35-44 years old) and married generation X cohort lives in the core jurisdictions in smaller numbers than their younger, renting and unmarried counterparts. This suggests that there is a continued pull toward the suburb as generation Xers form families and purchase homes.

- Generation X has the largest proportion of foreign-born members. The foreign born generation X cohort in the region is concentrated in the suburbs where job growth due to construction and contracting increased dramatically between 2000 and 2010.

- While Alexandria and Arlington are consistently the most highly educated jurisdictions in the region across all age cohorts, generation X is the most educated age cohort across jurisdictions.

Current Demographics by Generation

In the Washington, DC region, generation X residents represented 30.8% of the population in 2010, while millennials and baby boomers each made up about 26% of the population. Figure 1 illustrates the overall population demographics.

Figure 1: Washington, DC Population by Age Cohort, 2010

- Under 5 years
- 5 to 24 Years (Millennials)
- 25 to 44 years (Gen X)
- 45 to 64 Years (Boomers)
- 65+ Years

Source: American Community Survey 2010 5 Year Estimates, GMU Center for Regional Analysis

Table 1 shows the generational cohort breakdown by jurisdiction. Millennials, or those between 5 and 24 in 2010, represented 1.4 million residents, with Fairfax, Prince George's and Montgomery County supporting more than 200,000 millennials each. Generation X, or those between 25 and 44 years old was the largest cohort with 1.7 million residents. Arlington, Alexandria and the District have disproportionate percentages of generation X residents (42.7, 41.8 and 33.4, respectively). However, the suburban jurisdictions are more evenly dispersed between the three primary study generations. The population over

65 was 523,480 in 2010, with Montgomery, Fairfax and the District supporting the largest numbers of seniors.

When generation X is broken out by decades (those born 1965-1974 and 1975-1984), the core jurisdictions defined above are shown to be skewed toward younger members. For instance, in Arlington and Alexandria, younger generation Xers make up 25.6% of the total population, while the older cohort makes up only 16.7% of the population. In fact, in the District, there are 28% more generation X residents at the younger end of the spectrum than those at the older end. Meanwhile in the suburban jurisdictions of Maryland and Virginia, the opposite is true. In Fauquier, Charles and Stafford counties the difference between the number of young and old gen-Xers was 58.5, 45.2 and 38.2 percent, respectively.

| Table 1: Washington DC Region Population by Age Cohort, 2010							
Jurisdiction	Total	Under 5 years	5 to 24 Years (Millennials)	25 to 44 Years (Gen- X)	45 to 64 Years (Boomers)	65 to 84 Years	85 years and over
Washington, DC	**584,400**	**32,422**	**152,521**	**195,435**	**136,914**	**57,494**	**9,614**
Calvert	87,891	5,083	25,554	22,427	25,872	7,935	1,020
Charles	143,912	9,604	41,706	41,670	38,346	11,222	1,364
Frederick	229,205	15,314	62,972	63,720	62,977	20,699	3,523
Montgomery	947,230	63,510	238,900	268,812	261,886	95,676	18,446
Prince George's	854,722	59,498	247,660	253,685	217,492	69,808	6,579
Suburban Maryland	**2,262,960**	**153,009**	**616,792**	**650,314**	**606,573**	**205,340**	**30,932**
Arlington	197,467	11,209	39,848	84,225	44,897	14,347	2,941
Clarke	14,013	725	3,339	3,296	4,512	1,898	243
Fairfax	1,048,554	71,540	267,425	315,764	295,046	87,150	11,629
Fauquier	64,546	3,939	17,327	16,285	19,366	6,937	692
Loudoun	291,653	27,328	79,134	100,071	67,278	15,909	1,933
Prince William	379,415	32,817	110,753	120,369	91,239	22,136	2,101
Spotsylvania	120,212	8,534	35,702	33,954	30,987	9,731	1,304
Stafford	124,587	8,701	39,770	35,899	31,684	7,791	742
Warren	37,044	2,367	9,801	9,941	10,294	3,943	698
Alexandria	133,647	9,483	23,136	55,882	32,844	10,395	1,907
Fairfax	22,058	1,186	5,369	6,378	6,220	2,514	391
Falls Church	11,465	742	2,986	2,963	3,491	1,082	201
Fredericksburg	23,375	1,598	8,500	6,040	4,731	2,074	432
Manassas	36,067	3,153	10,624	11,110	8,830	2,164	186
Manassas Park	13,195	1,327	3,778	4,849	2,528	677	36
Northern Virginia	**2,238,217**	**167,383**	**608,635**	**681,106**	**590,583**	**169,335**	**21,175**
Jefferson	**52,033**	**3,426**	**14,127**	**14,187**	**14,377**	**5,329**	**587**
Total	**5,416,691**	**373,506**	**1,440,932**	**1,666,962**	**1,411,811**	**456,911**	**66,569**

Source: American Community Survey, 2010 5 Year Estimates, GMU Center for Regional Analysis

The racial makeup of the generational cohorts also varied by jurisdiction. Figures 2-4 demonstrate the race and ethnicity of millennials (Figure 2), generation X (Figure 3), and baby boomers (Figure 4) in four geographic categories: Suburban Maryland, Arlington and Alexandria, Washington, DC, and the Balance of Northern Virginia. Millennials in the District were 56.3% African American, compared to 29.1% white, 9.7% Latino, and 3.5% Asian. However, in Northern Virginia, Arlington, and Alexandria 5 to 24 year olds were overwhelmingly white in 2010. Latino and Asian millennials in the suburbs and Arlington/Alexandria made up higher proportions of the cohort than in the District.


Figure 2: Millennial Population by Race, 2010
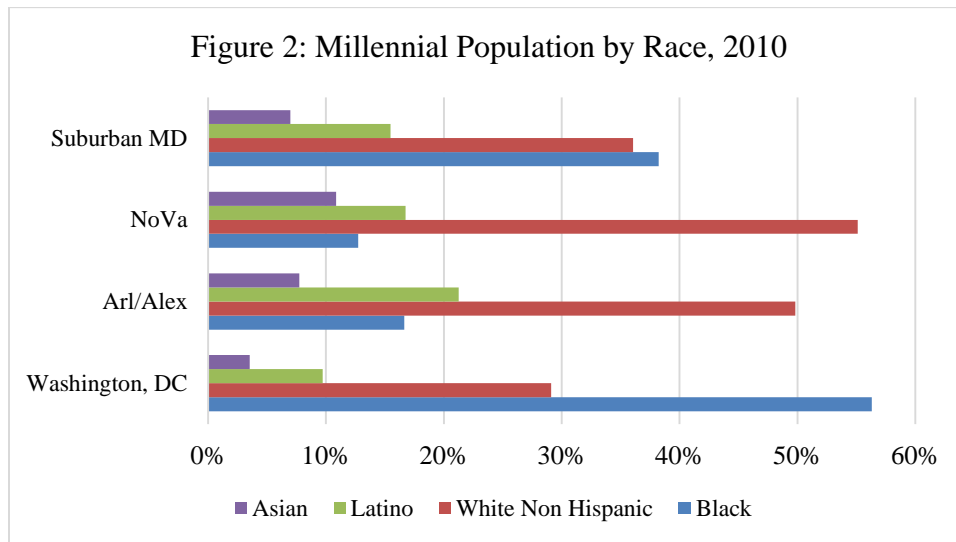
Source: American Community Survey, 2010 5 Year Estimates, GMU Center for Regional Analysis

Whites also make up the bulk of the Arlington/Alexandria (60.2%) and Northern Virginia (54.4%) generation X cohort. Unlike the millennial Generation, generation X Latinos (17.3%) and Asians (14.5%) make up a significantly larger proportion of the populations in Northern Virginia counties. Conversely, the District and Suburban Maryland gen Xers are more evenly split between White and African American residents. In the District, whites and African Americans made up 42.3 and 40.2% of the generation X population, respectively, and Suburban Maryland is 36.8% African American and 35.3% White.
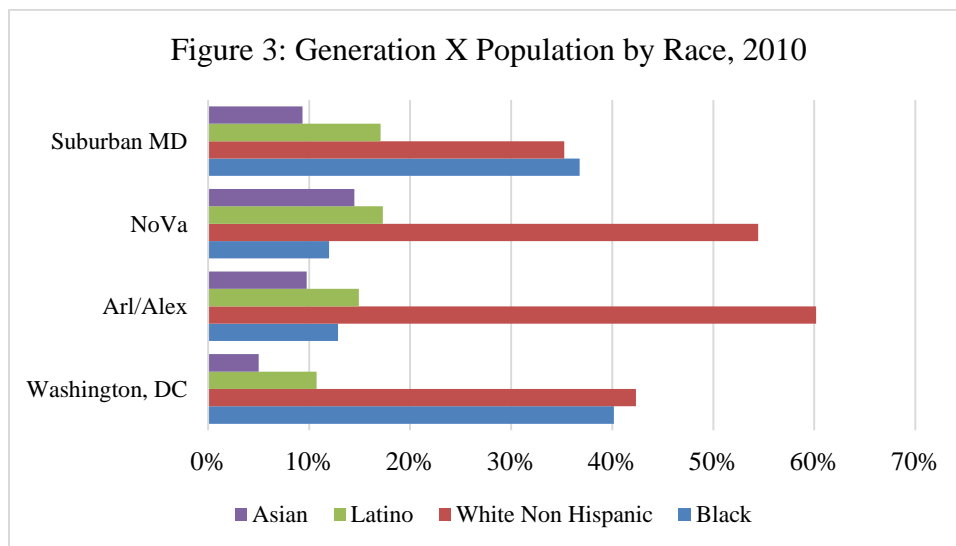
Figure 3: Generation X Population by Race, 2010

Source: American Community Survey, 2010 5 Year Estimates, GMU Center for Regional Analysis

Figure 4 illustrates that baby boomer communities are far more homogenous in terms of race and ethnicity than the more recent two generations within jurisdiction. In the District, for example, African Americans made up 60.7% of the baby boom generation, compared to 29.5% white, 6.3 Latino, and 2.4% Asian. Meanwhile the aggregation of the suburban Maryland jurisdictions masks the overall segregation between the three jurisdictions. Frederick County was 85.9% white, and Montgomery County and Prince George's County had boomer populations that were 60.0 and 19.6% white, respectively.
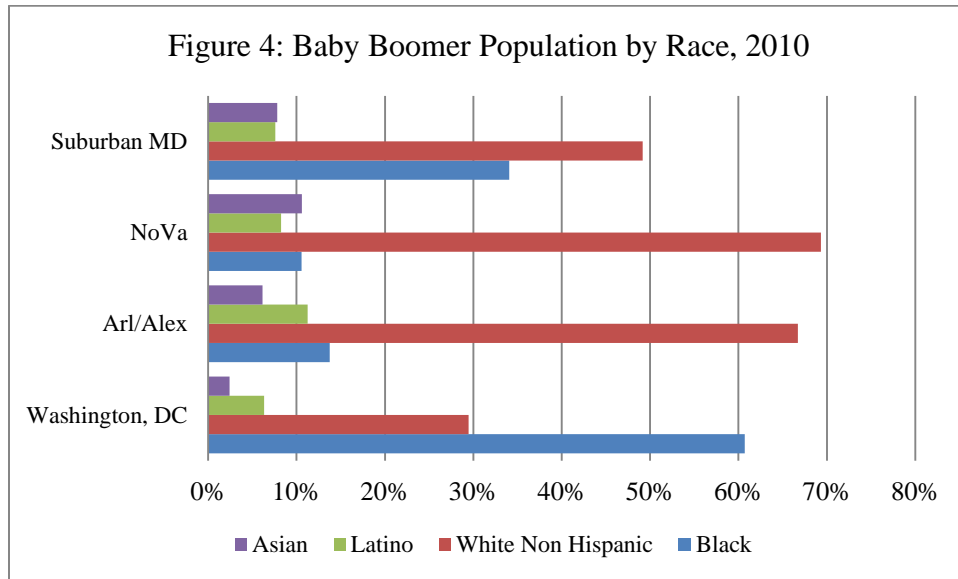
Figure 4: Baby Boomer Population by Race, 2010

Source: American Community Survey, 2010 5 Year Estimates, GMU Center for Regional Analysis

Poverty across generations was notably more common among millennials. As Table 2 shows, the percentage of the region's total population living in poverty was 7.9 percent, with the two youngest cohorts experiencing the highest percentages. In the District, poverty was disproportionately high among the youngest millennials (5-17 Years old) with 30.7% living below the poverty line. By contrast only 22.3% of older millennials in the District lived below the poverty line in 2010. However, more generally across the region, older millennials had slightly higher rates of poverty, or they were roughly the same as their younger counterparts. Conversely, The District also experienced the highest rate of baby boomer and senior poverty at 15.9 and 13.5% respectively. This may reflect the historic segregation patterns of the District, which left many now-aging low-income and African American residents DC, as whites and higher income people left the city in the middle of the 20th Century.

| Table 2: Population in Poverty by Age Cohort, 2010						
Geography	Total Poverty	Under 5 years	5to 24 Years (Millennial)	25 to 44 years (Gen X)	45 to 64 Years (Boomers)	65 Years and older
Washington, DC	18.5	12.1	26.2	11.6	15.9	13.5
Calvert	4.4	2.8	4.8	4.4	3.2	5.1
Charles	5.2	3.9	6.8	4.1	3.6	4.5
Frederick	4.8	3.4	5.3	4.3	3.3	5.3
Montgomery	6.0	3.8	8.2	5.6	3.7	6.0
Prince George's	7.9	4.5	11.2	6.9	4.8	6.4
Arlington	7.0	4.1	11.5	5.6	4.1	9.1
Clarke	7.3	12.8	9.0	7.2	5.0	6.9
Fairfax	5.1	3.5	7.4	4.8	3.2	4.4
Fauquier	5.4	4.1	6.5	4.6	4.3	5.8
Loudoun	3.2	1.1	3.9	3.0	2.1	4.2
Prince William	5.3	4.2	7.1	4.7	2.9	4.7
Spotsylvania	7.4	4.6	9.6	6.8	4.1	5.9
Stafford	4.0	3.4	4.3	3.6	2.7	4.7
Warren	9.6	6.5	11.3	9.3	6.4	8.7
Alexandria	7.8	5.9	14.2	5.9	5.9	7.5
Fairfax	5.0	2.1	9.2	5.2	2.9	0.3
Falls Church	4.8	0.0	7.9	2.6	2.0	10.4
Fredericksburg	17.6	11.5	23.5	8.0	10.0	9.0
Manassas	13.4	8.7	17.8	13.7	7.3	5.7
Manassas Park	7.3	3.2	11.5	5.9	4.7	4.5
Jefferson	8.4	6.6	13.3	6.2	5.0	6.8
Region	**7.9**	**10.6**	**11.5**	**6.8**	**5.4**	**6.7**

Source: American Community Survey, 2010 5 Year Estimates, GMU Center for Regional Analysis

Foreign born residents made significant contributions to the generation X population across the region, specifically in Suburban Maryland where a third of generation X is made up of foreign born residents. Table 3 shows the proportion of foreign born residents by age cohort and jurisdiction. The shares were highest in Montgomery County (45.8%), Fairfax County (42.6%) and Prince William County (34.0%) where generation X Latino and Asian communities represent disproportionate shares. The smallest shares among generation X populations were in Jefferson County (4.5%), Calvert County (5.2%), and Warren County (6.3%).

| Table 3: Foreign Born Population by Age Cohort, 2010						
Geography	Total	Under 5 years	5-24 Years (Millennial)	25-44 Years (Generation X)	45-64 Years (Baby Boomers)	65+ Years
Washington, DC	**13.0**	**2.2**	**7.7**	**18.3**	**14.6**	**11.8**
Calvert	3.5	0.8	1.4	5.2	3.6	6.1
Charles	4.9	0.0	2.0	7.5	6.4	4.8
Frederick	9.1	0.8	5.4	16.0	8.7	6.8
Montgomery	30.9	4.0	17.6	45.8	35.3	28.7
Prince George's	19.4	2.0	11.9	32.2	19.6	14.1
Suburban Maryland	**21.6**	**2.6**	**12.4**	**33.7**	**23.8**	**19.6**
Arlington	23.1	4.8	17.4	27.5	24.4	23.6
Clarke	3.7	0.0	1.8	7.7	3.4	2.5
Fairfax	28.8	2.7	17.1	42.6	31.0	28.2
Fauquier	6.0	0.0	2.7	11.9	5.7	4.8
Frederick	5.3	0.6	2.5	10.6	4.3	4.3
Loudoun	21.7	1.8	11.5	34.0	23.0	24.3
Prince William	21.3	1.7	12.9	34.0	22.3	19.8
Spotsylvania	6.1	1.6	3.6	9.8	6.0	6.5
Stafford	7.9	1.3	3.3	13.1	9.2	8.6
Warren	3.5	0.8	0.9	6.3	3.4	4.5
Alexandria	24.0	3.3	20.4	31.3	20.9	21.9
Fairfax	25.4	6.2	13.5	39.8	27.3	19.2
Falls Church	17.9	7.0	13.4	20.7	18.8	26.1
Fredericksburg	9.2	0.9	7.0	16.2	7.6	8.3
Manassas	24.7	0.9	15.8	45.0	21.2	13.5
Manassas Park	29.4	2.7	20.9	43.1	32.0	21.5
Jefferson	**3.4**	**0.0**	**2.9**	**4.5**	**4.1**	**2.2**
Northern Virginia	**21.7**	**1.1**	**6.1**	**16.3**	**11.1**	**9.0**
Region	**20.6**	**2.4**	**12.1**	**31.4**	**22.5**	**19.2**

Source: American Community Survey, 2010 5 Year Estimates, GMU Center for Regional Analysis

Figures 5, 6, and 7 show the educational attainment for the three primary cohorts for the District, Arlington/Alexandria, Northern Virginia, and Suburban Maryland. Arlington and Alexandria have the most educated millennial population with more than 41.5% achieving a Bachelor's degree, compared to 16.9% regionally. This is largely due to the heavy concentration of older millennials, compared to other jurisdictions. Meanwhile, the suburban jurisdictions of Virginia and Maryland have similar rates of educational attainment among millennials.
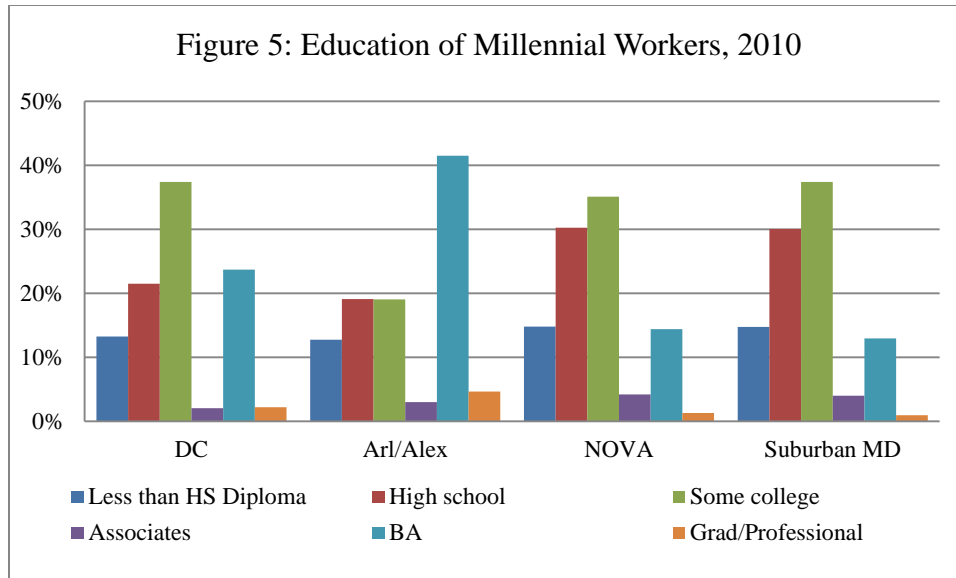
Figure 5: Education of Millennial Workers, 2010

Source: American Community Survey, 2010 5 Year Estimates, GMU Center for Regional Analysis

In contrast, as shown on Figure 6, generation X boasts high percentages of workers with college and professional or graduate degrees and low levels of those with a high school diploma or less. These workers are concentrated in the close-in jurisdictions of Arlington/Alexandria and the District, where 71.4% and 59.2% have at least Bachelor's degree. Fairfax, Fauquier and Prince William counties also had high concentrated of college- and graduate-educated residents. Suburban Maryland was more diverse in terms of education, likely representing the unique mix of foreign born, current students, and low-income residents.
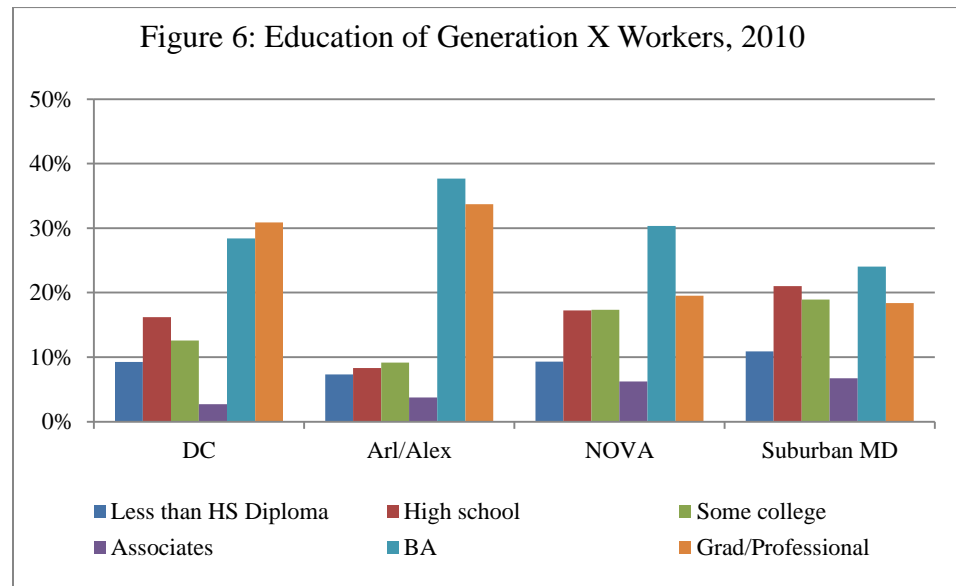
Figure 6: Education of Generation X Workers, 2010

Source: American Community Survey, 2010 5 Year Estimates, GMU Center for Regional Analysis

In figure 7, the education of baby boomers illustrates a more uniform pattern across educational outcomes. Arlington and Alexandria are outliers in this area with 64.4% of all baby boomers earning a bachelor's or graduate degree, compared to 47.7% in the region. It is notable that the percentage of baby

boomers in the District with only a high school diploma is similar to that of DC millennials (23.3% and 21.5% respectively), in spite of the fact that some millennials will yet have been ready to graduate.


Figure 7: Education of Baby Boomer Workers, 2010
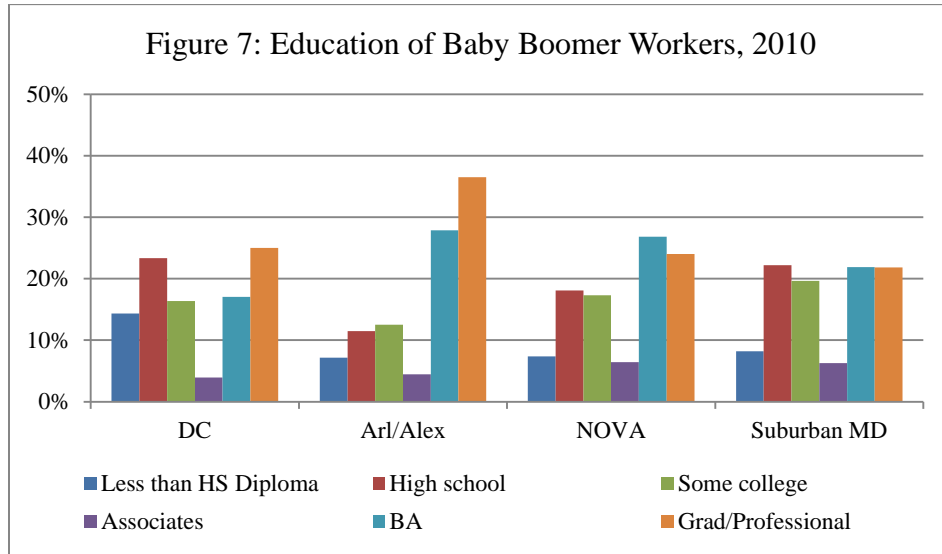
Source: American Community Survey, 2010 5 Year Estimates, GMU Center for Regional Analysis

Homeownership and Commuting Choices of the Baby Boom, Generation X, and Millennial

Homeownership and commuting patterns across the three generational cohorts vary widely by age and jurisdiction. Figure 8 shows the percentage of residents living in owner-occupied housing by age and geographic area. While the rates for baby boomers and seniors living in the suburbs are relatively uniform, the percentage of homeowners varies in the core jurisdictions and also among generation X households. In the suburban areas of Northern Virginia and Maryland where the proportion of older generation X households is highest, the homeownership rate for them is also high. Meanwhile, in the District, Arlington and Alexandria, the share of generation X homeowners is low (32.9%, 31.8% and 32.5% respectively). Within those jurisdictions, younger cohort members had lower proportions of homeowners than their older members.

This may be associated with the shift in the age of marriage. Compared to young cohort members, older members of generation X are more noticeably more likely to be married across jurisdictions. When combined with the lower numbers of those married 35 to 44 year olds, these data may suggest that many in this cohort still move to suburban jurisdictions to start families or buy homes. However, it is notable that generation Xers continue to make up 14% of the District and 16.7% of Arlington and Alexandria populations, compared to 16.4 and 15.3% in Northern Virginia and Suburban Maryland, respectively.
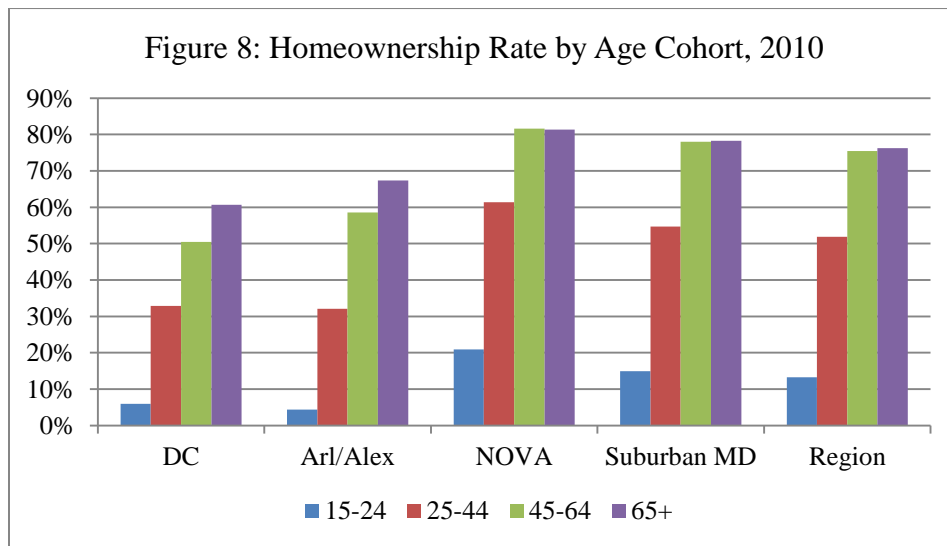
Source: American Community Survey, 2010 5 Year Estimates, GMU Center for Regional Analysis

Table 4 demonstrates the percentage of workers driving alone in 2010 by age cohort. Across the region, 66% of all workers drove alone to work. Older workers are more likely to drive than their younger counterparts. As expected, the presence of Metro Rail exacerbates that differential. In all jurisdictions, 69.3% of baby boomers, 65.7% of generation X, and only 56.3% of millennials drove alone to work. However, in the District, only 35.9% of all workers drove alone, with only 17.9% of millennials driving alone. By contrast, 73.6% of Northern Virginia workers drove alone in 2010 with very little variation across generations.

Table 4: Workers Driving Alone by Age Cohort, 2010					
Jurisdiction	Total	16 - 24 Years	25 to 44 years	45 to 64 Years	65 + Years
Washington, DC	**35.9**	**17.9**	**35.1**	**43.6**	**43.8**
Calvert	78.1	78.5	77.3	78.8	77.2
Charles	77.7	73.9	78.9	77.6	73.9
Frederick	78.5	72.7	79.2	79.8	75.4
Montgomery	66.1	55.6	65.2	69.3	68.5
Prince George's	64.1	48.1	65.1	67.7	73.3
Suburban Maryland	**67.8**	**56.4**	**67.9**	**70.7**	**71.0**
Arlington	52.8	43.3	53.1	56.3	53.8
Alexandria	60.6	53.8	60.8	62.0	61.3
Arlington/Alexandria	**55.9**	**46.7**	**56.2**	**58.7**	**56.8**
Clarke	82.6	84.3	80.8	84.0	81.4
Fairfax	72.5	67.9	73.0	73.3	70.9
Fauquier	78.9	81.4	79.4	78.1	75.6
Loudoun	78.6	77.1	78.8	79.2	71.3
Prince William	70.8	65.1	71.2	71.9	74.2
Spotsylvania	77.7	79.6	77.3	77.4	81.0
Stafford	73.6	64.1	75.8	74.1	76.5
Warren	76.8	73.7	78.8	75.8	75.6
Fairfax	69.5	74.6	69.1	69.7	57.1
Falls Church	64.0	70.8	55.3	67.9	85.0
Fredericksburg	69.8	63.8	70.8	71.3	77.0
Manassas	76.6	75.1	75.0	78.6	83.2
Manassas Park	70.1	65.4	69.5	73.0	100.0
Jefferson	**73.3**	**65.4**	**73.3**	**75.6**	**75.5**
Northern Virginia	**73.6**	**69.4**	**74.0**	**74.3**	**72.7**
Regional	**66.0**	**56.3**	**65.7**	**69.3**	**67.6**

Source: American Community Survey 2010 5 Year Estimates, GMU Center for Regional Analysis

Profiles of Generational Cohorts

The three study cohorts had significant variation in terms of demand and demographics. Tables 5-7 show profiles of each generation for all jurisdictions. Baby Boomers (defined as those born between 1945 and 1964), were more likely to live in suburban jurisdictions. Only 13.3% of baby boomers have never married while 62.5% are currently married. The cohort is majority white (56.6%) and moved to the region from somewhere else in the US (58.2%). Only 22.5% were born outside of the US. Homeownership among baby boomers is also higher than the national average with 75.5% owning their own homes in the Washington, DC region. They are also more likely to drive alone (69.3%) for commuting than to take other forms of transportation. Conversely, they were more likely to work from home than the other cohorts with 5.3% telecommuting.

Table 5: Baby Boomer Profile

Total Number	1,411,811
Male	48.0%
Female	52.0%
Married	62.5%
Never Married	13.3%
Race/Ethnicity/Nativity	
Black	25.7%
White (Non-Hispanic)	56.6%
Latino	7.9%
Asian	8.4%
Foreign Born	22.5%
Moved from out-of-state	58.2%
Housing Tenure	
% Homeowners	75.5%
Commuting Patterns	
Drove Alone	69.3%
Public Transit	12.4%
Walked	1.9%
Bike/Taxi	1.3%
Worked from Home	5.3%

Source: American Community Survey 2010 5 Year Estimates, GMU Center for Regional Analysis

Generation X is a highly diverse generation. While whites make up 46.0% of the cohort in the DC area, Latinos represent 16.2%, African Americans make up 25.0%, and Asians make up 11.0%. Almost a third (31.4%) of the cohort was born outside of the US, while 47.1% moved from outside the state. Only half of the cohort is currently married, and 36.3% have never married. Fewer than half (48.1%) of generation X owns a home, and these are disproportionately older members of the cohort (35-44 years old) who live in suburban communities. Gen Xers were more likely than boomers to take public transportation with 14.7% relying on it for commuting. However, 65.7% drive alone for commuting.

Table 6: Generation X Profile

Total Number	1,666,962
Male	48.7%
Female	51.3%
Married	50.2%
Never Married	36.3%
Race/Ethnicity/Nativity	
Black	25.0%
White (Non-Hispanic)	46.0%
Latino	16.2%
Asian	11.0%
Foreign Born	31.4%
Moved from out-of-state	47.1%
Tenure	
% Homeowners	48.1%
Commuting Patterns	
Drove Alone	65.7%
Public Transit	14.7%
Walked	2.9%
Bike/Taxi	1.4%
Worked from Home	3.8%

Source: American Community Survey 2010 5 Year Estimates, GMU Center for Regional Analysis

Millennials (defined as those born between 1985 and 2004), are diverse like generation X. However, like boomers, millennials are segregated by jurisdiction. As a group, 28.4% are African American, 44.0% are white, 15.7% are Latino, and 8.3% are Asian. Fewer were born out of state (35.5%) or out of the country (12.1%) than the other cohorts, largely reflecting the fact that only the older millennials have left their parents' homes for college, family formation, or work. For those who commute for work, more than half (56.3%) drove alone while 17.1% drove alone, and 8.4% walked.

Table 7: Millennial Profile

Total Number	1,440,932
Male	50.8%
Female	49.2%
Married	3.5%
Never Married	94.1%
Race/Ethnicity/Nativity	
Black	28.4%
White (Non-Hispanic)	44.0%
Latino	15.7%
Asian	8.3%
Foreign Born	12.1%
Moved from out-of-state	35.5%
Tenure	
% Homeowners	13.2%
Commuting Patterns	
Drove Alone	56.3%
Public Transit	17.1%
Walked	8.4%
Bike/Taxi	1.8%
Worked from Home	2.4%

Source: American Community Survey 2010 5 Year Estimates, GMU Center for Regional Analysis

Population Projections by Age

Over the next decade the regional population is expected to grow rapidly. Detailed population projections for the region by jurisdiction are shown in Table 8 and Table 9. Millennials are expected to represent the largest share of the regional population with 1.9 million millennials in the DC area by 2020, continuing the trend of attracting a young demographic to the region for jobs and education. This growth will continue to impact the demand for rental housing, as well as housing units in the core. Millennial populations will represent increasingly significant shares of the population in Arlington (43.3%), Alexandria (40.9%) and the District (34.3%) by 2020.

Table 8: Population Projections for Washington by Age Cohort, DC Region, 2020						
Jurisdiction	Total Population	0-14 Years	15-34 Years (Millennial)	35-54 Years (Generation X)	55-64 Years (Baby Boomers)	65+ Years
Washington, DC	682,473	103,912	234,113	190,655	69,966	83,827
Calvert	99,016	20,528	23,091	29,648	13,850	11,899
Charles	170,577	30,375	43,747	46,329	28,118	22,008
Frederick	265,440	50,290	69,639	78,378	31,986	35,148
Montgomery	1,085,814	197,426	277,663	291,331	139,432	179,962
Prince George's	933,659	180,646	290,520	231,272	120,763	110,457
Arlington	236,672	29,807	102,458	55,958	24,586	23,864
Clarke	15,032	2,426	2,612	4,503	2,375	3,116
Fauquier	71,551	13,213	13,607	21,055	11,782	11,895
Loudoun	481,162	119,117	138,379	141,436	47,905	34,325
Stafford	158,514	38,311	41,954	47,117	17,672	13,461
Warren	40,918	7,884	9,365	11,744	5,423	6,501
Alexandria	154,055	19,516	62,953	39,182	16,329	16,075
Fairfax*	1,208,091	223,879	318,944	323,747	173,852	167,668
Frederick	114,764	21,171	29,355	30,702	14,065	19,471
Prince William**	589,249	127,185	161,308	153,403	81,186	66,167
Spotsylvania***	178,467	36,449	48,283	49,278	21,234	23,223
Jefferson	61,375	10,781	14,498	17,609	9,665	8,822
Region	**6,546,830**	**1,232,917**	**1,882,490**	**1,763,347**	**830,188**	**837,887**

Source: Global Insight, GMU Center for Regional Analysis
* Includes the Cities of Fairfax and Falls Church
** Includes Manassas and Manassas Park
***Includes Fredericksburg

Meanwhile, by 2030, a new and similarly-sized generation to the millennials will have emerged. This as yet unnamed generation[2] , while representing a smaller share of the population in the core jurisdictions,

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[2] Suggestions have included "Generation Z" or the "iGeneration."

will overtake millennials in suburban and ex-urban communities. This growing group, which will be age 0-14 in 2020, will also increase the demand for housing units that can accommodate growing families in the core.

Conversely, the number of people over the age of 65 is expected to double in the next two decades. The bulk of these baby boomers currently live in the suburban jurisdictions and own their own homes. However, as they age they may demand greater healthcare services. Further they may look for ways to downsize within their communities. Conversely, the rate of poverty for current baby boomers will continue to drive social service and housing needs in the District.

Table 9: Population Projections for Washington, DC Region by Age Cohort, 2030					
Jurisdiction	Total Population	0-24 Years	25-44 Years (Millennial)	45-64 Years (Generation X)	65+ Years (Baby Boomers)
Washington, DC	695,592	211,854	218,873	164,376	100,489
Calvert	116,003	37,099	31,076	32,235	15,592
Charles	200,939	53,668	58,986	56,775	31,510
Frederick	307,702	91,416	90,563	79,870	45,854
Montgomery	1,146,185	332,649	299,421	292,904	221,211
Prince George's	967,977	326,411	276,073	229,674	135,820
Arlington	224,958	55,948	98,403	47,977	22,630
Clarke	15,536	3,751	3,536	4,588	3,661
Fauquier	78,048	21,494	17,426	23,757	15,371
Loudoun	755,602	263,055	298,199	137,063	57,285
Stafford	194,622	72,455	57,743	45,763	18,661
Warren	44,593	13,619	12,322	10,945	7,707
Alexandria	148,173	34,465	64,845	33,118	15,744
Fairfax*	1,171,310	340,464	306,246	325,227	199,373
Frederick	121,885	37,457	32,594	28,232	23,602
Prince William**	690,511	222,972	182,164	178,827	106,548
Spotsylvania***	212,481	71,860	53,427	55,858	31,336
Jefferson	74,068	21,150	19,286	21,715	11,917
Region	**7,166,184**	**2,211,786**	**2,121,184**	**1,768,904**	**1,064,310**

Source: Global Insight, GMU Center for Regional Analysis
*Includes the cities of Fairfax and Falls Church
**Includes Manassas and Manassas Park
***Includes Fredericksburg

Conclusions and Implications

The next 20 years in the Washington, DC region will bring about a turning point in demographics and subsequent development. The population of residents over 65 will double – even as the young population continues to grow and move to the region.

The challenges facing senior populations in the region will vary by jurisdiction

Although housing and access to healthcare services will be a challenge for all senior populations, the types and locations of housing and types of services required will likely vary. In the District where historic patterns of segregation concentrated many of the poorest residents of the region throughout the last quarter of the 20th Century, the City will need to focus on retaining and strengthening its many housing, transportation, and tax programs for low-income seniors. Conversely, in the suburbs, residents who purchased large family homes throughout the past several decades may need to downsize in order to address mobility challenges. In order to age-in-community, these households may need housing products that traditionally have not been a part of the suburban landscape. There may also be a need to find housing closer to services and shopping to reduce driving. Finally, the increased time of retirement will mean that many seniors throughout the region will need to access capital through the sale of their homes to smaller for sale or rental units.

Younger generations will continue to buy homes as they marry and start families

Although it was outside the scope of this paper to determine why a greater percentage of older gen-Xers are living outside the city, what is clear is that as they grow older, marry and start families, these households are purchasing homes outside of the core jurisdictions of the District, Arlington, and Alexandria. Many have cited schools, housing affordability, and neighborhood quality as reasons for these moves. As a result, many school districts have focused intensely on school quality, including access to free pre-K programs, charter schools, and open school boundaries to encourage parents to remain as their children age. However, housing affordability and increased single family or large multifamily units will need to be addressed to support these families at the core.

Jobs to support this changing demographic will be more dispersed throughout jurisdictions

Along with the growth of job centers outside the core which has resulted in new commuting patterns, new housing development, the shift in demographics will mean home healthcare, educational, and hospital workers will need to live and work outside the core. Research by the GMU Center for Regional Analysis predicts that these jobs will be lower wage and will rely on supports such as public transportation. Further, they will require a more affordable housing product than is often available in many of the region's high-income communities.

The persistent in-migration of young professionals will result in continued demand for multifamily units at the core.

The continued in-migration of unmarried professional millennials will continue to drive the need for small rental housing units in transit-accessible neighborhoods in the core jurisdictions. Their continued demand for central city locations will also drive the demand for bars, restaurants, parks, and entertainment

options. Although in the District, housing production has temporarily met demand in the multifamily sector, the continued attraction of 13,000 net new residents annually will continue to support multifamily production. It will also require different types of units to support a wide range of incomes – including recent college graduates, low- and moderate-income households, new families, and long-time residents.