

# Issues Fairfax 2008 Leading the Creative Economy: Is the Workforce Ready?

## *Framing the Issue*

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# Key Questions

- How Will Fairfax County's Economy Change by 2025?
- How Will Economic Change Impact the County's Labor Force Requirements?
- What Other Forces Will Shape the County's Future Labor Force Needs?
- How Will These Labor Force Needs Change Education/Training Requirements in the Future?

# The Fairfax County Economy: 2007

# Fairfax County's Economy: GCP and Income Growth, 1989 – 2007

(in billions of 2007\$)

	1989	2007	Change
Population	840,000	1,064,500	26.7%
Gross County Product	\$38.4	\$93.2	142.7%
Per Capita Income	\$38,446	\$69,286	80.2%
Jobs Per 10 Residents	6.6	8.4	1.8
Net Dollars Gained/Lost Due to Commuters	+ \$7.6	- \$1.1	- \$8.7

# Fairfax County's Economy: Total Job Change, 1989 – 2007

(in thousands)

SECTOR	1989	2007	Change	%
Construction	47.2	50.6	3.4	7.2
Manufacturing	19.4	17.9	-1.5	-7.7
Trans., Comm., Utilities	24.2	56.0	31.8	<b>131.4</b>
Wholesale Trade	22.7	22.2	-0.5	-2.2
Retail Trade	88.8	80.0	-8.8	-10.0
Finance, Ins., R.E.	57.6	78.3	20.7	35.9
Services	199.2	475.2	276.0	<b>138.6</b>
Government	85.2	110.1	24.9	29.2
Federal	44.4	49.0	4.6	10.4
State & Local	40.8	61.0	20.2	49.5
TOTAL	550.4	892.8	342.4	62.2

Source: NPA Data Services. \* includes military \*\* fast growing sectors

# Fairfax County's Economy: Job Change by Sector, 2002-2007

(% new jobs)

Sector	U.S.	WMSA	Fairfax
Professional, Business Services	27.3	44.4	73.7
Other Services	1.6	8.7	--
Education & Health	29.2	12.5	21.3
Financial	6.3	3.0	5.7
Transp. & Utilities	3.7	-0.9	5.5
Leisure/Hosp.	20.5	10.4	4.0
Federal	0.5	3.2	3.3
Retail Trade	6.4	5.6	2.0
Construction	12.4	8.2	1.7
State & Local Government	10	13.9	0.8
Manufacturing	-19	-3.8	-2.0
Wholesale Trade	5.2	2.8	-2.0
Information	-5.1	-8.3	-14.2

# The Fairfax County Economy: 2025

# Fairfax County's Economy: GCP and Income Growth, 2007 - 2025

(in billions of 2007\$)

	2007	2025	Change
Population	1,064,500	1,415,200	32.9%
Gross County Product	\$93.2	\$216.6	132.4%
Per Capita Income	\$69,286	\$98,041	41.5%
Jobs Per 10 Residents	8.4	10.2	1.8
Net Dollars Gained/Lost Due to Commuters	- \$1.1	- \$35.2	- \$34.1

# Fairfax County's Economy: Total Job Change, 2007 - 2025

(in thousands)

SECTOR	2007	2025	Change	%
Construction	50.6	54.5	3.9	7.7
Manufacturing	17.9	24.6	6.7	37.4
Trans., Comm., Utilities	56.0	112.4	56.4	<b>100.7</b>
Wholesale Trade	22.2	34.8	12.6	56.8
Retail Trade	80.0	118.0	38.0	47.5
Finance, Ins., R.E.	78.3	106.2	27.9	35.6
Services	475.2	834.4	359.2	<b>75.6</b>
Government	110.1	159.5	49.4	44.9
Federal	49.0	71.3	22.3	45.5
State & Local	61.0	88.2	27.2	44.6
<b>TOTAL</b>	<b>892.8</b>	<b>1448.3</b>	<b>555.5</b>	<b>62.2</b>

Source: NPA Data Services. \* includes military \*\* fast growing sectors

# Fairfax County's Primary Growth Sectors

(% Share)

Sector	2007	2025
Goods Producing	7.7	5.5
Services Producing	92.3	94.5
Professional/Business	35.4	38.8
Health and Education	15.5	21.7

## Labor Force Requirements: 2007 - 2025

Category	Jobs	% Change
Net New Jobs	555,500	62.2
Services	359,200	75.6
% of change		64.7
Transp., Comm., Utilities	56,400	100.7
% of change		10.1
Subtotals (Principal Sectors)	415,600	74.8
Government	49,400	44.9
% of change		8.9
Retirements	275,400	30.8
Job Turnover	2,917,800	
Private Sector (@ .15/yr)	2,796,500	
Public Sector (@ .05/yr)	121,300	

# Occupational Forecasts for the U.S. Economy: 2006 - 2016

# Occupational Forecasts, U.S., 2006 – 2016 (percent change)

<b>All Occupations</b>	<b>10.4</b>
Professional*	16.7
Service*	16.7
Management/Financial	10.4
Construction	9.5
Installation/Repair	9.3
Sales	7.6
Office Administrative	7.2
Transportation	4.5
Farming/Fishery/Forestry	-2.8
Production	-4.9

Source: BLS

\* account for 63% of all new jobs

# Fast Growth Occupations, U.S., 2006 – 2016

	% Change	% of New Jobs
All Occupations	10.4	100.0
Health Care Support	26.8	6.4
Computer Science	24.8	5.3
Community/Social Service	22.7	3.5
Personal Care	22.0	7.0
Health Care Practitioners	19.8	9.1
Subtotal		31.3
Building Cleaning/Maintenance	14.8	5.4
Protective Service	14.3	2.9
Education	14.0	8.1
Food Service	12.7	9.2
Subtotal		25.6
Total, Above Occupations		56.9

# Occupations with Largest Gain, U.S., 2006 – 2016

	% Change	% of New Jobs
All Occupations	10.4	100.0
Registered Nurses	23.5	3.8
Retail Sales Persons	12.4	3.6
Customer Service Representatives	24.8	3.5
Food Prep/Service	18.1	2.9
Office Clerks	12.6	2.6
Personal/Home Care Aides	50.6	2.5
Home Health Aides	48.6	2.5
Post Secondary Teachers	22.9	2.4
Janitors/cleaners	14.5	2.2
Nurses Aides	18.2	1.7
<b>Total Top Ten</b>		<b>27.7</b>

# Occupations with Largest Gain, U.S., 2006 – 2016

	% Change	% of New Jobs
<b>Second Ten</b>		
Bookkeeping/Clerks	12.5	1.7
Waiters/Waitresses	10.8	1.6
Child Care Workers	17.8	1.6
Executive Secretaries	14.8	1.5
Computer Software Engineers	44.6	1.4
Accountants	17.7	1.4
Landscapers/Groundskeepers	18.1	1.4
Elementary School Teachers	13.6	1.3
Receptionists	17.2	1.3
Truck Drivers	10.4	1.2
<b>Total Top Twenty</b>		42.1

# Employment by Educational and Training Level, U.S., 2016

Level	% All Jobs	% Job Openings	% Change*
First Professional Degree	1.4	1.3	14.0
Doctoral Degree	1.5	1.6	21.6
Masters' Degree	1.5	1.6	18.9
Bachelors' Degree	13.0	13.2	16.5
Associate Degree	4.2	4.4	18.7
Postsecondary Vocational	5.4	4.9	13.6
Work Experience	9.6	8.1	9.0
Long-term On-Job-Training	7.3	6.5	6.2
Moderate-Term " "	17.6	14.8	7.4
Short -Term " "	34.3	39.7	8.8

Source: BLS

\* 2006 - 2016

# Conclusions

- Fairfax County's demand for new workers will substantially exceed its resident labor force.
- Labor force demand will consist of: net new jobs (growth), replacement of returning workers, and backfilling of job vacancies from annual turnover of workers.
- The future workforce will require a broad cross-section of technical skills and educational levels

# Conclusions

- **The fastest growing occupations will include:**
  - Health Care Services
  - Personal/Home Care Services
  - Education Services
  - Food Services
  - Professional and Business Services

# Conclusions

- Educational and training opportunities to meet the County's future labor force requirements must emphasize:
  - Basic educational attainment (K-12) preparatory for life-long learning including analytical, communications, and thinking skills
  - Continuous adult education and training programs: skills-specific short courses
  - Retraining to meet demands for early, mid, and later career changes: certificate and degree programs

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