
DEMOGRAPHIC AND HOUSING ANALYSIS

A. INTRODUCTION

The following section examines the demographic and housing trends and characteristics that define Prince William County. They are the foundation from which the County will grow and develop over the next twenty years. The analysis examines population and household growth, as well as housing characteristics and compares them to the Washington, DC Metropolitan Statistical Area (MSA). The demographic and housing analysis is not an exhaustive review of all statistical measures, but only those that impact the demand for future housing in Prince William County, Virginia. The consultants have also included data for an area referenced as the Greater Manassas submarket, which is a combination of census tracts that comprise the Cities of Manassas and Manassas Park. While both communities are Virginia independent cities, and thus are not within the jurisdictional boundaries of Prince William County, their presence in the middle of the County is significant and must be accounted for. What happens at the fringes of these two cities may influence future policies and County decision-making relative to growth, development, and future housing needs.

1. Methodology

The consultants have relied on data obtained from several sources including the U.S. Census and various government data sources such as American Community Survey (ACS), which is an annual data set prepared by the Census Bureau in 1-year and 5-year data sets, in between decennial censuses. The ACS is one of the most comprehensive sources of information about the U.S. population, providing crucial demographic, social, economic, and housing statistics. RKG Associates used the ACS 2015-2019 5-year estimates, which provides more statistical accuracy given the 5-year period as opposed to the 1-year survey data, which has a greater margin of error. In addition, the COVID-19 pandemic significantly disrupted survey data collection efforts during 2020, which affected the quality of 2020 ACS statistics and data products. It should be noted that as of the writing of this analysis, the U.S. Census is just beginning to release the results of the 2020 Decennial Census, but the full data release is not yet available.

RKG also relied on data provided by EMSI an ESRI, two national providers of demographic and economic data. In addition, population projections from the Metropolitan Washington Council of Government (COG) were obtained out to 2040. This is largely tied to the region's population and housing forecasts and will drive planning for the County's future affordable housing needs. The Council of Government's data is from the region's transportation demand model, which drives regional transportation forecasts and traffic modeling. The region is broken up into hundreds of transportation analysis zones (TAZ), which contain

forecasts for population, households, and employment. RKG has assembled these TAZ into the same submarket geography presented in Map 2-1.

B. SUMMARY OF FINDINGS

1. Demographic Trends

- Prince William County has Experienced Rapid Growth Since 1980
Since 1980, Prince William County's population has increased from 144,703 to 467,900, for an increase of 323,197 population or an average annual rate of 5.6%. This rapid growth makes Prince William County one of the fastest growing counties in the Commonwealth of Virginia over this period.
- County Population Growth has Moderated Since 2010
The most significant growth period occurred between 2000 and 2010, when the county added 121,189 persons. However, since 2010, new population growth has declined by 45.6% to 65,898 new persons, for an annual growth rate of 1.6%.
- The Northwest Submarket has Experienced the Fastest and Most Numerical Growth Since 2000
The Northwest submarket has experienced the fastest and most significant nominal growth (82,437 people) since 2000, increasing from a population of 24,896 in 2000 to 107,333 in 2020. This has resulted in 16.6% annual growth, driven largely by development moving west from the DC Metropolitan Area along Interstate 66.
- Projected Population to Slow out to 2040
Over the next 20 years, the Washington DC Metropolitan Council of Governments projects that the greatest population gains will occur in the I-95 submarket, with the addition of 74,500 new residents, followed by over 40,500 in the Northwest submarket. The Central PWC submarket is considerably smaller with a 2020 population of 58,714.
- Prince William County is Becoming a more Racially Diverse Place, but Not Evenly
While viewed as a Washington, DC suburb, Prince William County is becoming more diverse in terms of its population. This is less so in the Northwest and Central PWC submarkets which have majority white populations greater than 70% in 2019. However, the County is fairly representative of the MSA's diversity. It has a slightly larger white population but is comparable in terms of other non-white racial groups and has a larger Hispanic population (20.6%), even when you remove the Greater Manassas submarket.
- Hispanic Population Change is Driving Prince William Population Diversity
The Hispanic population, which is not a racial group, but rather an ethnic category including all people of Hispanic ancestry, is much higher in some areas. For example, 27.1% of the I-95 submarket population is classified as Hispanic or Latino and it's the first submarket that has a majority non-white population. The Greater Manassas

submarket, which is just outside the County's jurisdiction, has nearly 42% of its population classified as Hispanic or Latino.

- County Median Income Levels are one of the Highest in the U.S. but not all Submarkets are Keeping Pace

A review of 2020 median household income shows that Prince William County (including the Greater Manassas submarket), has a median income roughly the same as the MSA (\$103,891) and much greater than Virginia (\$73,543). The Central PWC submarket has the highest reported median income at \$145,844, followed by the Northwest submarket at \$140,462. In contrast, the largest submarket, I-95, has the lowest median household income at \$98,833, roughly 32% below the Central PWC submarket.

2. Housing Characteristics

- The County's Housing Stock Consists Mostly of Single-family Homes but more Multi-family is Needed in the Future

Prince William County's housing stock is primarily comprised of single-family homes (detached and attached), representing more than 86% of all units in 2010 and dropping slightly to 84% in 2019, not including the Greater Manassas submarket. The I-95 submarket has a more diverse housing stock, with a smaller share of single-family units (78.5%) comprised of more attached single-family or townhouse units (31%) than either Northwest (22.4%) or Central PWC (6.9%).

- The I-95 Submarket is Disproportionately Providing Most of the County's Multi-family Housing. Greater Housing Equity is Needed Throughout the County

In terms of traditional renter-occupied housing, including structures of 3 units or more, only the I-95 submarket is providing significant housing in that market segment. County residents have expressed concerns about "housing equity" or equal access to housing throughout the County. The data suggest that different types of housing are clustering into specific areas. For example, multi-family housing is clustering in the I-95 corridor at much higher levels than the more suburban areas of Northwest and Central PWC. While these suburban submarkets are newer and developers have led with single-family homes over the past few decades, more diverse housing options must start to infill behind this first generation of housing development.

- Some County Land Use Policies are Running Counter to its Housing Equity and Affordable Housing Goals. Land Constraints are Driving up Land Values.

The presence for large-lot residential zoning (i.e., 10-acre minimum lot sizes) in the Northwest and Central PWC submarkets is antithetical to local affordable housing goals and must be reexamined for its future impacts on land values and housing costs. If affordable housing is a goal for the County, this will become increasingly difficult or impossible in the future as the County's land supply is reduced and the unit price for land continues to increase. Early indications suggest that such a situation could start to emerge over the next 20 years.

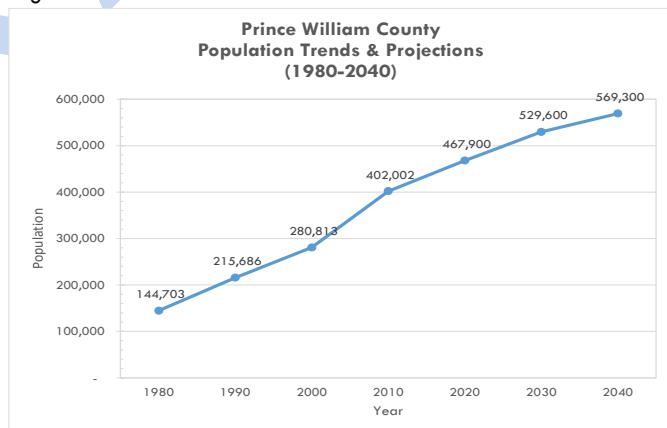
- The County’s Housing Stock is Mostly Less than 40 Years Old and in Good Condition
While Prince William County was originally established in 1731, only 2.7% of all existing housing was built before 1960 (not including the Greater Manassas submarket). This indicates that much of the residential development visible today was constructed over the past sixty years. According to the County’s property assessment database, over 77% of the County’s housing units have been constructed in just the past 40 years and 43% since 2000.
- Opportunities to Revitalize Housing in the I-95 Submarket will Help its Aging Housing Stock
The fastest growing submarket in Prince William County is the Northwest area, which has the greatest share of housing (77%) built since 2000, followed by the Central PWC at 37.7%. The I-95 submarket saw most of its housing (66.9%) constructed between 1960 and 1980.
- Housing Cost-Burdening is on the Rise Among Renter Households
In 2010, roughly 50% of the County’s renter households were cost burdened, led by the Northwest and I-95 submarkets. By 2019, the percentage of cost-burdened renters had increased to 51.5% Countywide, and only Northwest renters improved their position over the decade. All other submarkets had over 50% cost-burdened renter households.

C. DEMOGRAPHIC TREND ANALYSIS

1. Historical Population Trends and Projections

Since 1980, Prince William County’s population has increased from 144,703 to 467,900, for an increase of 323,197 population or an average annual rate of 5.6% (Figure 2-1). This rapid growth makes Prince William County one of the fastest growing counties in the Commonwealth of Virginia over this period. The most significant growth period occurred between 2000 and 2010, when the county added 121,189 persons. However, since 2010, new population growth has declined by 45.6% to 65,898 new persons, for an annual growth rate of 1.6%. In the future, the Metropolitan Washington COG projects that the County’s population will moderate to 1.3% annually out to 2030, then will slow to less than 1% out to 2040 (Figure 2-1). While this drop in population growth rate reflects a decline in the number of new people moving into Prince William County, it also reflects the maturing of the population as it starts to approach 600,000 people.

Figure 2-1



Source: U.S. Census and ESRI, 2021

2. Submarket Population Trends (2000-2020)

For purposes of this analysis, the consultants broke down the County's population into four separate submarket areas. This allowed for a more granular understanding of inter-county population changes, which were later overlaid with population forecast data from the Metropolitan Washington Council of Governments and real estate market conditions, which are generally reported at a submarket level. As mentioned above, the data in this section include a combined area referred to as the Greater Manassas submarket, which is not part of Prince William County. The analysis includes these two cities, because they sit within Prince William County and influence land use decisions and growth patterns around them. However, it should be noted, that the comprehensive plan recommendations do not include these cities but do address issues at the fringes of the Greater Manassas submarket, to the extent that they impact areas within Prince William County's jurisdictional boundaries.

The Northwest submarket has experienced the fastest and most significant nominal growth (82,437 people) since 2000, increasing from a population of 24,896 in 2000 to 107,333 in 2020. This has resulted in 16.6% annual growth, driven largely by development moving west from the DC Metropolitan Area along Interstate 66, but converging with the Prince William Parkway, Route 29 and Sudley Road in Gainesville, Haymarket and north of Manassas (Table 2-1).

As the population of this submarket has increased, the annual growth rate has dropped to a more manageable 2.7% per year over the past decade. The County's largest submarket is the I-95 submarket, which includes Woodbridge, Dale City and Dumfries and had an estimated population of 244,100 in 2020. This represents 53% of the County's total population. This submarket added more than 72,000 new residents over the past 20 years but grew at a much slower average annual rate of 2.1%, due to the larger population base.

Over the next 20 years, the COG projects that the greatest population gains will occur in the I-95 submarket, with the addition of 74,500 new residents, followed by over 40,500 in the Northwest submarket (Table 2-2). The Central PWC submarket is considerably smaller with a 2020 population of 58,714.

**Population Trends and Projections, 2000-2030
 Prince William County Submarkets, Washington DC Metro MSA, and Virginia**

Submarket Area	2000	2010	2020	2030*	2040*	Chg. '00-'10		Chg. '10-'20		Chg. '20-'30		Chg. '20-'40	
						Actual	Ann. %	Actual	Ann. %	Actual	Ann. %	Actual	Ann. %
Northwest Submarket	24,896	84,300	107,333	122,705	132,542	59,404	23.9%	23,033	2.7%	15,372	1.4%	25,209	1.2%
Greater Manassas Submarket	84,489	97,773	108,308	115,863	124,192	13,284	1.6%	10,535	1.1%	7,555	0.7%	15,884	0.7%
Central PWC Submarket	38,341	51,217	58,714	75,531	80,747	12,876	3.4%	7,497	1.5%	16,817	2.9%	22,033	1.9%
I-95 Corridor Submarket	171,662	215,874	244,100	272,357	290,374	44,212	2.6%	28,226	1.3%	28,257	1.2%	46,274	0.9%
Prince William County**	326,239	454,096	523,924	586,456	627,855	127,857	3.9%	69,828	1.5%	62,532	1.2%	103,931	1.0%
Washington DC Metro MSA	4,849,950	5,649,540	6,298,330	N/A	N/A	799,590	1.6%	648,790	1.1%	N/A	N/A	N/A	N/A
Virginia***	7,078,515	8,001,024	8,684,166	9,331,666	9,876,728	922,509	1.3%	683,142	0.9%	647,500	0.7%	1,192,562	0.7%

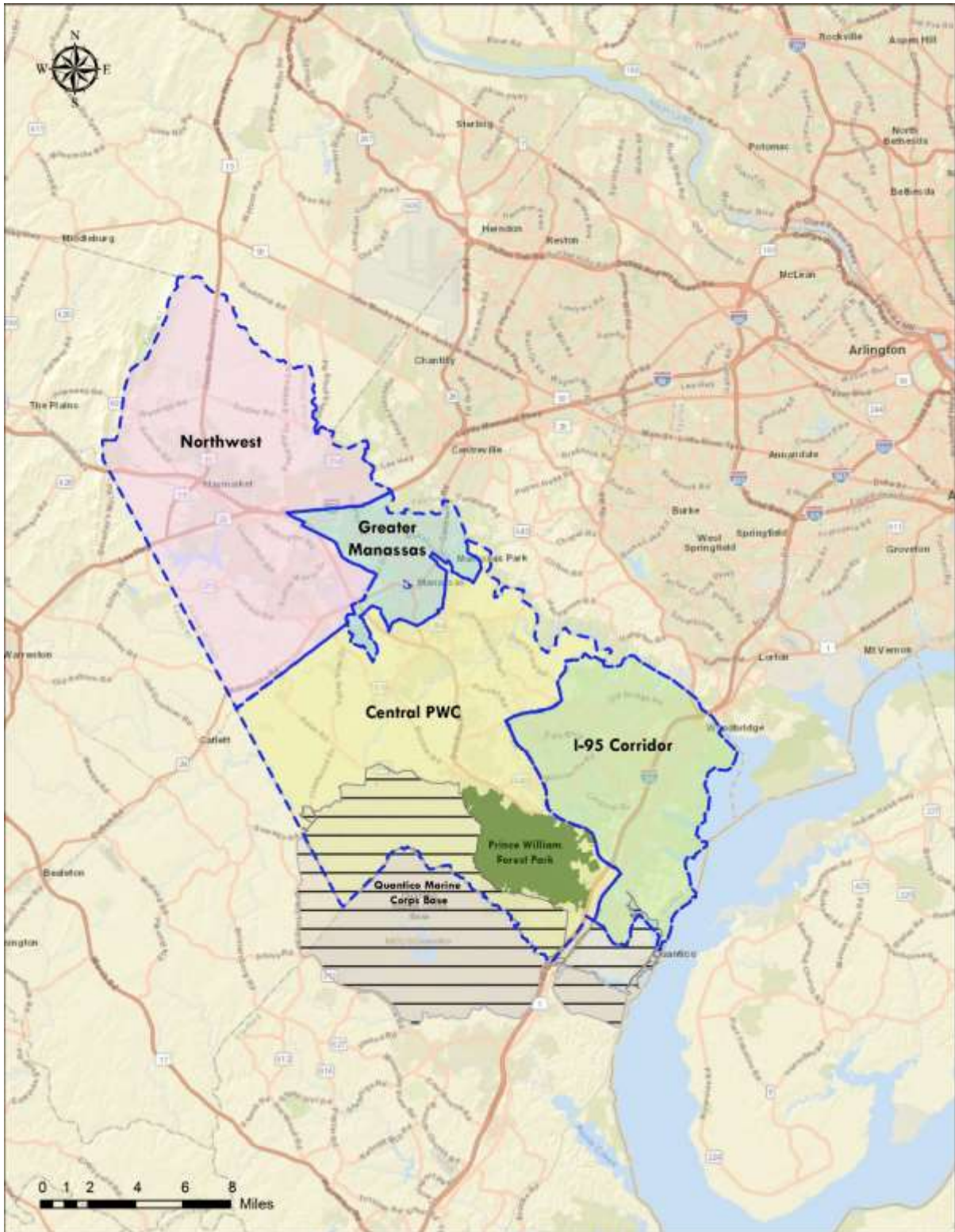
Note: * Source: Metropolitan Washington Council of Governments 9.2 Round projections by TAZ (except for Washington DC Metro MSA and Virginia data)

** Including Manassas City and Manassas Park City

*** Virginia 2030 projection source: University of Virginia Cooper Center

Source: EMSI, University of Virginia Cooper Center, Metropolitan Washington Council of Governments, and RKG Associates, Inc., 2021

Map 2-1



Source: RKG Associates, Inc., 2021

3. Submarket Household Trends (2000-2020)

Submarket household trends over the past decade have closely mirrored population trends during the same period, with similar annual growth rates. For example, the Northwest submarket has experienced 2.6% annual growth in households and 2.7% growth in population during the past decade. However, what has changed has been the size of Prince William households, which have steadily grown in terms of average household size. This trend has run counter to the Washington DC MSA and the Commonwealth of Virginia, which have remained fairly stable over the past 20 years.

The most significant change occurred in the Northwest submarket, where average household size has increased from 2.89 persons in 2000 to 3.19 person in 2020 – a change of 10.4% (Table 2-2). That indicates that for every 1,000 new households, 300 additional new population would be added to the population over 2000 levels. Changes in household size have not been as pronounced in either the I-95 or Center PWC submarkets. This may indicate that a larger number of family households or multi-generational households have settled in the Northwest submarket.

Table 2-2
Average Household Size Trends, 2000-2025
Prince William County Submarkets, Washington DC Metro MSA, and Virginia

	2000	2010	2020	2025
Northwest Submarket	2.89	3.13	3.19	3.20
Greater Manassas Submarket	2.87	3.02	3.06	3.07
Central PWC Submarket	3.08	3.11	3.11	3.12
I-95 Corridor Submarket	2.96	3.03	3.03	3.04
Prince William County	2.95	3.05	3.08	3.09
Washington DC Metro MSA	2.61	2.64	2.65	2.66
Virginia	2.54	2.54	2.55	2.56

Source: EMSI, and RKG Associates, Inc., 2021

4. Age Distribution of Population (2010-2019)

Changes in the age distribution of population can indicate shifting characteristics that could impact the demand for different housing types. For example, growth in family households with children will have different housing needs than senior households over aged 65. A submarket review of the County indicates that most all submarkets are growing faster than either the MSA or the state. However, over the past decade, the Northwest submarket, has seen a marked change in the number of family households with children under the age of 24 and strong growth in the number of households headed by persons 45-54 years old. In addition, the number senior households over 65 years old has grown significantly in just 10 years, growing from 7.7% of the submarket population to 11.4% (Table 2-3).

The Central PWC submarket, which is smaller, has not had the same increase in younger population under 24 years, but has seen a near doubling of seniors over 65 and persons aged 55-64. At the same time, household forming age cohorts between 35 to 54 have experience numerical declines. This suggests that older and more established households have been moving to this submarket rather than young families. There could be a number of factors causing these changes, but housing availability, price and schools often influence the location decisions of younger households.

Similar trends are occurring in the I-95 submarket, where older households are growing, and younger cohorts are declining in terms of their share of the total population. While the aging of the population is a national trend, the Central PWC and Northwest submarkets are populated by older households that are similar to the MSA (Figure 2-2). As persons age in place, there may be a growing need for senior housing of all types such as 55 and older developments, assisted living, memory care and nursing care. A new 480-unit 55 and older community called Carter Mills is under construction in the Haymarket area. This Dell Webb community is offering residents access to a number of amenities, including: a 14,000 square-foot clubhouse, which will include a fitness center and a movement studio. There will also be a craft room and a game room, as well as two social halls and an indoor pool and spa. The two urban submarkets, Greater Manassas and I-95 are attracting a slightly younger population with roughly 50% of their population under the age of 35 in 2019. This may reflect the fact that both submarkets offer greater housing choices and variety of rental price points that are more accessible to people not looking to purchase a home.

Table 2-3

Population by Age, 2010-2019

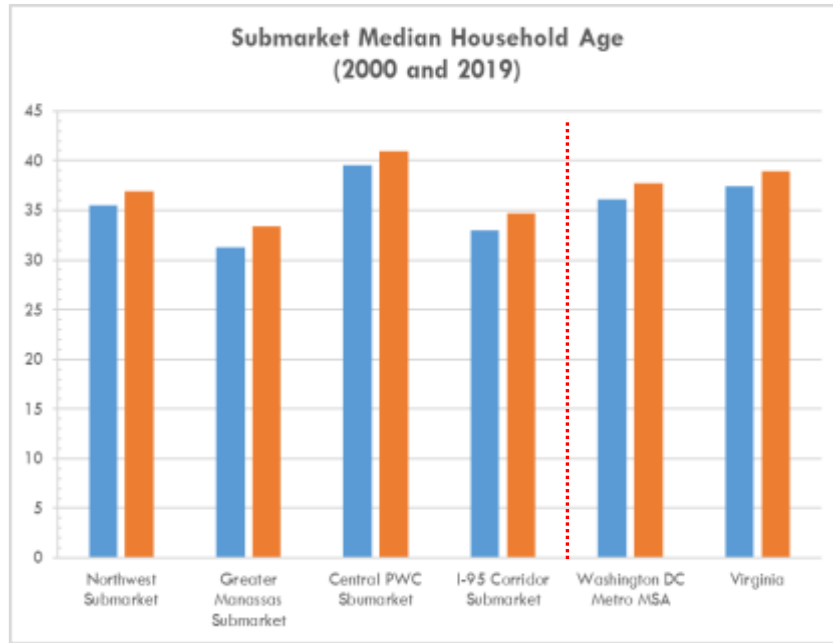
Prince William County Submarkets, Washington DC MSA, and Virginia

	2010		2019		Chg. '10-'19	
	Count	Percent	Count	Percent	Actual Chg. n.	% Chg.
Northwest Submarket						
Total Population	77,419	100.0%	100,446	100.0%	23,027	3.3%
0-24	29,178	37.7%	37,722	37.6%	8,544	3.3%
25-34	9,357	12.1%	9,933	9.9%	576	0.7%
35-44	15,121	19.5%	15,167	15.1%	46	0.0%
45-54	10,471	13.5%	16,927	16.9%	6,456	6.9%
55-64	7,306	9.4%	9,271	9.2%	1,965	3.0%
65+	5,986	7.7%	11,426	11.4%	5,440	10.1%
Greater Manassas Submarket						
Total Population	90,507	100.0%	110,548	100.0%	20,041	2.5%
0-24	33,773	37.3%	40,101	36.3%	6,328	2.1%
25-34	17,198	19.0%	19,500	17.6%	2,302	1.5%
35-44	14,870	16.4%	17,147	15.5%	2,277	1.7%
45-54	11,803	13.0%	13,720	12.4%	1,917	1.8%
55-64	7,563	8.4%	10,879	9.8%	3,316	4.9%
65+	5,300	5.9%	9,201	8.3%	3,901	8.2%
Central PWC Submarket						
Total Population	49,863	100.0%	56,631	100.0%	6,768	1.5%
0-24	18,218	36.5%	18,911	33.4%	693	0.4%
25-34	4,114	8.3%	5,747	10.1%	1,633	4.4%
35-44	8,315	16.7%	7,726	13.6%	(589)	-0.8%
45-54	10,265	20.6%	9,654	17.0%	(611)	-0.7%
55-64	5,567	11.2%	8,231	14.5%	2,664	5.3%
65+	3,384	6.8%	6,362	11.2%	2,978	9.8%
I-95 Corridor Submarket						
Total Population	204,020	100.0%	246,358	100.0%	42,338	2.3%
0-24	76,926	37.7%	86,854	35.3%	9,928	1.4%
25-34	31,943	15.7%	35,258	14.3%	3,315	1.2%
35-44	33,112	16.2%	38,835	15.8%	5,723	1.9%
45-54	30,810	15.1%	34,333	13.9%	3,523	1.3%
55-64	18,639	9.1%	28,684	11.6%	10,045	6.0%
65+	12,590	6.2%	22,394	9.1%	9,804	8.7%
Prince William County*						
Total Population	421,809	100.0%	513,983	100.0%	92,174	2.4%
0-24	158,095	37.5%	183,588	35.7%	25,493	1.8%
25-34	62,612	14.8%	70,438	13.7%	7,826	1.4%
35-44	71,418	16.9%	78,875	15.3%	7,457	1.2%
45-54	63,349	15.0%	74,634	14.5%	11,285	2.0%
55-64	39,075	9.3%	57,065	11.1%	17,990	5.1%
65+	27,260	6.5%	49,383	9.6%	22,123	9.0%
Washington DC Metro MSA						
Total Population	5,416,691	100.0%	6,196,585	100.0%	779,894	1.6%
0-24	1,814,438	33.5%	1,969,523	31.8%	155,085	0.9%
25-34	814,508	15.0%	930,535	15.0%	116,027	1.6%
35-44	852,454	15.7%	888,876	14.3%	36,422	0.5%
45-54	822,765	15.2%	869,352	14.0%	46,587	0.6%
55-64	589,046	10.9%	752,271	12.1%	163,225	3.1%
65+	523,480	9.7%	786,028	12.7%	262,548	5.6%
Virginia						
Total Population	7,841,754	100.0%	8,454,463	100.0%	612,709	0.9%
0-24	2,633,218	33.6%	2,677,577	31.7%	44,359	0.2%
25-34	1,050,694	13.4%	1,174,091	13.9%	123,397	1.3%
35-44	1,142,586	14.6%	1,100,460	13.0%	(42,126)	-0.4%
45-54	1,185,123	15.1%	1,139,236	13.5%	(45,887)	-0.4%
55-64	900,955	11.5%	1,091,153	12.9%	190,198	2.3%
65+	529,178	11.8%	1,271,946	15.0%	342,768	4.1%

Note: * Including Manassas City and Manassas Park City

Source: American Community Survey and RKG Associates, Inc., 2021

Figure 2-2



Source: EMSI, and RKG Associates, Inc., 2021

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5. Racial Composition of Population (2010-2019)

The distribution of population by racial group varies greatly between submarkets, as compared to the Washington DC MSA, which was 53% white and 47% non-white in 2019 (Table 2-4). A similar trend is occurring nationwide as the non-white share of the population increases each decade. However, whereas the Hispanic population is growing rapidly in the U.S., it is less prominent in the MSA, accounting for only 15.8% of the population, as compared to over 18% nationally.

In Prince William County, the Hispanic population, which is not a racial group, but rather an ethnic category including all people of Hispanic ancestry, is much higher in some areas. For example, 27.1% of the I-95 submarket population is classified as Hispanic or Latino and it's the first submarket that has a majority non-white population. The Greater Manassas submarket, which is just outside the County's jurisdiction, has nearly 42% of its population classified as Hispanic or Latino.

While viewed as a Washington, DC suburb, Prince William County is becoming more diverse in terms of its population. This is less so in the Northwest and Central PWC submarkets

Table 2-4

Population Racial Composition, 2010-2019

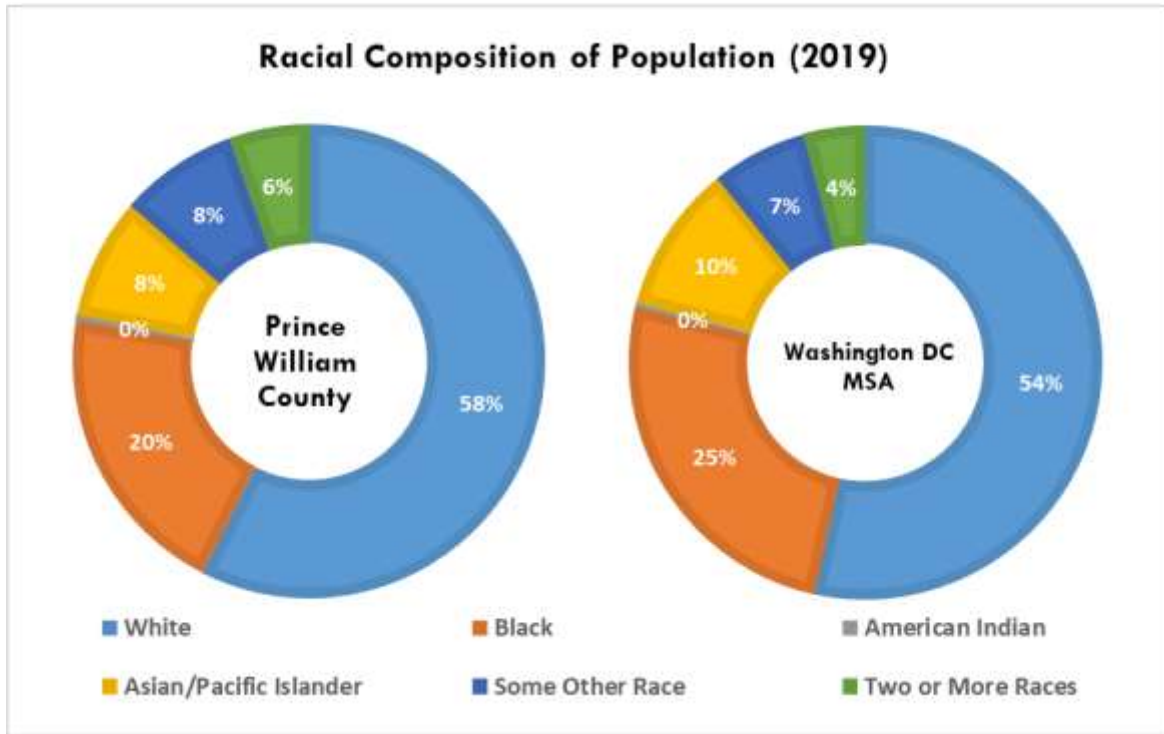
Prince William County Submarkets, Washington DC MSA, and Virginia

	2010		2019		Chg. '10-'19	
	Count	Percent	Count	Percent	Actual Chg.	Ann. % Chg.
Northwest Submarket						
Total Population	77,419	100.0%	100,446	100.0%	23,027	3.3%
White	55,504	71.7%	70,874	70.6%	15,370	3.1%
Black	7,529	9.7%	11,216	11.2%	3,687	5.4%
American Indian	147	0.2%	356	0.4%	209	15.8%
Asian/Pacific Islander	8,104	10.5%	10,405	10.4%	2,301	3.2%
Some Other Race	3,177	4.1%	1,599	1.6%	(1,578)	-5.5%
Two or More Races	2,958	3.8%	5,996	6.0%	3,038	11.4%
Hispanic/Latino	8,772	11.3%	9,959	9.9%	1,187	1.5%
Greater Manassas Submarket						
Total Population	90,507	100.0%	110,548	100.0%	20,041	2.5%
White	57,148	63.1%	68,166	61.7%	11,018	2.1%
Black	12,195	13.5%	15,415	13.9%	3,220	2.9%
American Indian	486	0.5%	591	0.5%	105	2.4%
Asian/Pacific Islander	4,573	5.1%	8,793	8.0%	4,220	10.3%
Some Other Race	12,695	14.0%	11,814	10.7%	(881)	-0.8%
Two or More Races	3,410	3.8%	5,769	5.2%	2,359	7.7%
Hispanic/Latino	30,341	33.5%	46,094	41.7%	15,753.0	5.8%
Central PWC Submarket						
Total Population	49,863	100.0%	56,631	100.0%	6,768	1.5%
White	37,695	75.6%	41,033	72.5%	3,338	1.0%
Black	6,446	12.9%	8,505	15.0%	2,059	3.5%
American Indian	76	0.2%	47	0.1%	(29)	-4.2%
Asian/Pacific Islander	2,574	5.2%	3,239	5.7%	665	2.9%
Some Other Race	1,427	2.9%	1,352	2.4%	(75)	-0.6%
Two or More Races	1,645	3.3%	2,455	4.3%	810	5.5%
Hispanic/Latino	5,124	10.3%	6,634	11.7%	1510	3.3%
I-95 Corridor Submarket						
Total Population	204,020	100.0%	246,358	100.0%	42,338	2.3%
White	100,893	49.5%	115,235	46.8%	14,342	1.6%
Black	53,676	26.3%	68,945	28.0%	15,269	3.2%
American Indian	517	0.3%	1,219	0.5%	702	15.1%
Asian/Pacific Islander	15,232	7.5%	20,400	8.3%	5,168	3.8%
Some Other Race	25,518	12.5%	26,567	10.8%	1,049	0.5%
Two or More Races	8,184	4.0%	13,992	5.7%	5,808	7.9%
Hispanic/Latino	45,595	22.3%	66,669	27.1%	21074	5.1%
Prince William County*						
Total Population	421,809	100.0%	513,983	100.0%	92,174	2.4%
White	251,240	59.6%	295,308	57.5%	44,068	1.9%
Black	79,846	18.9%	104,081	20.2%	24,235	3.4%
American Indian	1,226	0.3%	2,213	0.4%	987	8.9%
Asian/Pacific Islander	30,483	7.2%	42,837	8.3%	12,354	4.5%
Some Other Race	42,817	10.2%	41,332	8.0%	(1,485)	-0.4%
Two or More Races	16,197	3.8%	28,212	5.5%	12,015	8.2%
Hispanic/Latino	89,832	21.3%	129,356	25.2%	39,524.0	4.9%
Washington DC MSA						
Total Population	5,416,691	100.0%	6,196,585	100.0%	779,894	1.6%
White	3,040,870	56.1%	3,313,053	53.5%	272,183	1.0%
Black	1,407,860	26.0%	1,569,935	25.3%	162,075	1.3%
American Indian	18,603	0.3%	19,727	0.3%	1,124	0.7%
Asian/Pacific Islander	496,966	9.2%	628,224	10.1%	131,258	2.9%
Some Other Race	300,080	5.5%	405,385	6.5%	105,305	3.9%
Two or More Races	152,312	2.8%	260,261	4.2%	107,949	7.9%
Hispanic/Latino	707,691	13.1%	976,666	15.8%	268,975.0	4.2%
Virginia						
Total Population	7,841,754	100.0%	8,454,463	100.0%	612,709	0.9%
White	5,479,975	69.9%	5,717,617	67.6%	237,642	0.5%
Black	1,532,150	19.5%	1,621,592	19.2%	89,442	0.6%
American Indian	24,941	0.3%	23,873	0.3%	(1,068)	-0.5%
Asian/Pacific Islander	422,260	5.4%	547,312	6.5%	125,052	3.3%
Some Other Race	201,692	2.6%	223,794	2.6%	22,102	1.2%
Two or More Races	180,736	2.3%	320,275	3.8%	139,539	8.6%
Hispanic/Latino	574,966	7.3%	792,001	9.4%	217,035.0	4.2%

Note: * Including Manassas City and Manassas Park City
 Source: American Community Survey, and RKG Associates, Inc., 2021

which have majority white populations more than 70% in 2019. However, as illustrated in Figure 2-3 below, the County is fairly representative of the MSA’s diversity. It has a slightly larger white population but is comparable in terms of other non-white racial groups and has a larger Hispanic population (20.6%), even when you remove the Greater Manassas submarket.

Figure 2-3

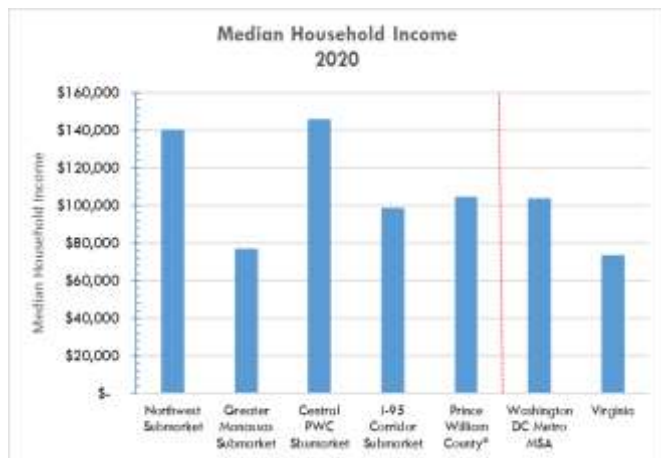


Source: American Community Survey, and RKG Associates, Inc., 2021

6. Median Household Income

Median household income is an important factor when considering the affordability of housing in a given area. The Washington DC MSA has one of the highest median household income levels in the U.S. and Northern Virginia tends that have even higher incomes. A review of 2020 median household income shows that Prince William County (including Greater Manassas submarket), has a median income roughly the same as the MSA and much greater than Virginia. However, individual submarkets are much higher than the MSA. The

Figure 2-4



Source: EMSI, and RKG Associates, Inc., 2021

Central PWC submarket has the highest reported median income in 2020 at \$145,844, followed by the Northwest submarket at \$140,462. In contrast, the largest submarket, I-95, has the lowest median household income in Prince William County at \$98,833, roughly 30% below the Central PWC submarket. Far below the I-95 submarket is the Greater Manassas area that reports median income levels at \$76,913.

Overall, the County has very high incomes, which are similar to other Northern Virginia jurisdictions such as Arlington County, Alexandria, Fairfax County and Loudon County. Since 2010, 18,654 households have been added to the County's population, including the Greater Manassas submarket.

Table 2-5
Household Income by Tenure Composition, 2010-2019
 Prince William County, VA

Income Ranges	Chg. '10-'19					
	Owner Household		Renter Household		Total Household	
Prince William County*	Actual	Chg. Ann. % Chg.	Actual	Chg. Ann. % Chg.	Actual	Chg. Ann. % Chg.
Total	11,268	1.2%	7,386	2.3%	18,654	1.5%
Less than \$5,000	378	5.4%	462	6.9%	840	6.2%
\$5,000 to \$9,999	(26)	-0.4%	(102)	-1.0%	(128)	-0.8%
\$10,000 to \$14,999	237	3.7%	83	0.7%	320	1.8%
\$15,000 to \$19,999	(387)	-3.4%	220	1.9%	(167)	-0.7%
\$20,000 to \$24,999	(81)	-0.6%	(45)	-0.3%	(126)	-0.4%
\$25,000 to \$34,999	362	1.2%	(24)	-0.1%	338	0.5%
\$35,000 to \$49,999	(804)	-1.2%	(584)	-1.0%	(1,388)	-1.1%
\$50,000 to \$74,999	(2,704)	-2.0%	139	0.2%	(2,565)	-1.2%
\$75,000 to \$99,999	(1,609)	-1.0%	1,453	3.4%	(156)	-0.1%
\$100,000 to \$149,999	1,203	0.5%	3,373	9.2%	4,576	1.6%
\$150,000 or more	14,699	5.8%	2,411	15.3%	17,110	6.3%

Source: American Community Survey and RKG Associates, Inc., 2021

Sixty percent of these households have been owner-occupants and have grown by 1.2%. Renter-occupied households have grown nearly twice as fast at 2.3%. Much of the household growth during the 2010-2019 period occurred at median household income levels above \$100,000 per year, while there was a net loss in households at lower income levels. When examining income data, it must be noted that as incomes rise over a decade, more people should move up the income ladder due to inflationary influences. However, at the lowest end of the income range, households earning under \$25,000/year, there was a small net increase in households at this level. The biggest losses occurred between \$35,000 and \$74,999/year. Either some of these people were priced out of the Prince William County housing market and left the County or they moved up in income to above \$100,000 where household growth occurred.

D. ANALYSIS OF HOUSING CHARACTERISTICS

1. Distribution of Housing Types (2010-2019)

Prince William County's housing stock is primarily comprised of single-family homes (detached and attached), representing more than 86% of all units in 2010 and dropping slightly to 84% in 2019, not including the Greater Manassas submarket (Table 2-6). The I-95 submarket has a more diverse housing stock, with a smaller share of single-family units (78.5%) comprised of more attached single-family or townhouse units (31%) than either Northwest (22.4%) or Central PWC (6.9%). The Greater Manassas submarket is quite different than the surrounding County, with only 69.4% single-family units and a greater supply of multi-family housing, particularly apartment buildings with 10 or more units.

In terms of traditional renter-occupied housing, including structures of 3 units or more, only the I-95 submarket is providing significant housing in that market segment. In 2010, 17.6% of the submarket’s housing was in this segment and it grew to 19.6% of all units by 2019. The Northwest (5.6%) and Central PWC (3.2%) submarkets have not seen much multi-family development over the past decade, but the total numbers have increased.

The issue of “social equity” has become a more prominent topic in public discussions related to the comprehensive plan update. County residents have expressed concerns about “housing equity” or equal access to housing choice throughout the County. The data suggest that different types of housing are clustering in the County in specific areas. For example, multi-family housing is clustering in the I-95 corridor at much higher levels than the more suburban areas of Northwest and Central PWC. While these suburban submarkets are newer and developers have led with single-family homes over the past few decades, more diverse housing options must start to infill behind this first generation of housing development.

Table 2-6
Housing by Type (2010-2019)
Prince William County, Virginia (including Greater Manassas Submarket)

	Northwest		Greater Manassas		Central PWC		I-95 Corridor		County*	
	Units	Percent	Units	Percent	Units	Percent	Units	Percent	Units	Percent
2010										
Total Housing Units	26,030	100.0%	34,289	100.0%	16,387	100.0%	73,553	100.0%	150,259	100.0%
1-unit, detached	19,303	74.2%	13,367	39.0%	14,951	91.2%	37,321	50.7%	84,942	56.5%
1-unit, attached	5,464	21.0%	10,411	30.4%	698	4.3%	22,064	30.0%	38,637	25.7%
2 units	202	0.8%	181	0.5%	11	0.1%	330	0.4%	724	0.5%
3 or 4 units	166	0.6%	687	2.0%	84	0.5%	820	1.1%	1,757	1.2%
5 to 9 units	255	1.0%	1,829	5.3%	67	0.4%	2,090	2.8%	4,241	2.8%
10 to 19 units	383	1.5%	5,566	16.2%	137	0.8%	7,690	10.5%	13,776	9.2%
20 or more units	239	0.9%	1,872	5.5%	16	0.1%	2,573	3.5%	4,700	3.1%
Mobile home	15	0.1%	376	1.1%	423	2.6%	665	0.9%	1,479	1.0%
Boat, RV, van, etc.	3	0.0%	0	0.0%	0	0.0%	0	0.0%	3	0.0%
2019										
Total Housing Units	31,602	100.0%	35,287	100.0%	17,519	100.0%	81,652	100.0%	166,060	100.0%
1-unit, detached	22,470	71.1%	13,585	38.5%	15,369	87.7%	38,792	47.5%	90,216	54.3%
1-unit, attached	7,083	22.4%	10,113	28.7%	1,216	6.9%	25,340	31.0%	43,752	26.3%
2 units	154	0.5%	326	0.9%	21	0.1%	528	0.6%	1,029	0.6%
3 or 4 units	175	0.6%	752	2.1%	9	0.1%	911	1.1%	1,847	1.1%
5 to 9 units	216	0.7%	1,980	5.6%	193	1.1%	2,189	2.7%	4,578	2.8%
10 to 19 units	503	1.6%	5,696	16.1%	167	1.0%	8,366	10.2%	14,732	8.9%
20 or more units	890	2.8%	2,581	7.3%	188	1.1%	4,547	5.6%	8,206	4.9%
Mobile home	106	0.3%	254	0.7%	356	2.0%	969	1.2%	1,685	1.0%
Boat, RV, van, etc.	5	0.0%	0	0.0%	0	0.0%	10	0.0%	15	0.0%
2010-2019 Change										
	Actual Chg.	Ann. % Chg.	Actual Chg.	Ann. % Chg.	Actual Chg.	Ann. % Chg.	Actual Chg.	Ann. % Chg.	Actual Chg.	Ann. % Chg.
Total Housing Units	5,572	2.4%	998	0.3%	1,132	0.8%	8,099	1.2%	15,801	1.2%
1-unit, detached	3,167	1.8%	218	0.2%	418	0.3%	1,471	0.4%	5,274	0.7%
1-unit, attached	1,619	3.3%	(298)	-0.3%	518	8.2%	3,276	1.6%	5,115	1.5%
2 units	(48)	-2.6%	145	8.9%	10	10.1%	198	6.7%	305	4.7%
3 or 4 units	9	0.6%	65	1.1%	(75)	-9.9%	91	1.2%	90	0.6%
5 to 9 units	(39)	-1.7%	151	0.9%	126	20.9%	99	0.5%	337	0.9%
10 to 19 units	120	3.5%	130	0.3%	30	2.4%	676	1.0%	956	0.8%
20 or more units	651	30.3%	709	4.2%	172	119.4%	1,974	8.5%	3,506	8.3%
Mobile home	91	67.4%	(122)	-3.6%	(67)	-1.8%	304	5.1%	206	1.5%
Boat, RV, van, etc.	2	7.4%	0	0.0%	0	0.0%	10	0.0%	12	44.4%

Note: * Including Manassas City and Manassas Park City, excluding Quantico

Source: ACS 2019 5-Year Estimates, ACS 2010 5-Year Estimates and RKG Associates, Inc., 2021

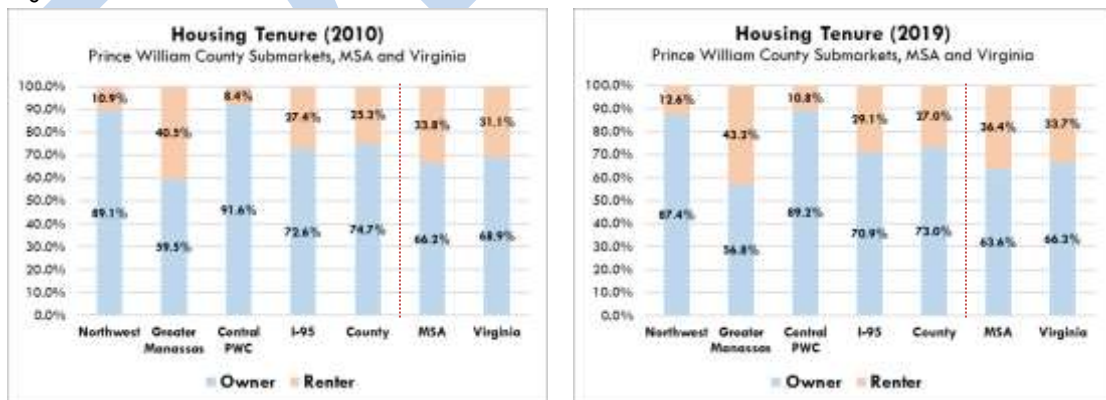
The presence for large-lot residential zoning (i.e., 10-acre minimum lot sizes) in these submarkets is antithetical to this objective and must be reexamined for its future impacts on land values and housing costs. Development constraints in these areas, and in parts of the County known as the “rural crescent,” create artificial land constraints, which pushes up the value of developable land elsewhere in the County. If affordable housing is a goal for the County, this will become increasingly difficult or impossible in the future as the County’s land supply is reduced and the unit price for land continues to increase. Early indications suggest that such a situation could start to emerge over the next 20 years.

2. Housing Tenure (2010-2019)

Housing tenure refers to the owner or renter status of occupied households. Generally, vacant units are added to get the total number of units in a given area. Prince William County’s housing tenure characteristics have changed since 2010. There has been a shift from owner-occupied to renter-occupied units over the past decade, with renter-occupied housing increasing as a share of the total supply from 20.6% in 2010 to 22.6% in 2019 (not including the Manassas submarket (Figure 2-5). With the increasing cost of housing, we would anticipate an acceleration of this trend over the next 20 years as rental housing becomes a larger share of the County’s housing supply.

The tenure data present in Figure 2-5 is different than the housing type data presented in Table 2-6. While tenure represents the actual owner/renter status of occupied units, housing type data equates the type of structure to the type of occupants served by the housing. However, it’s worth noting that not all single-family housing is occupied by owners, as many homes and condominiums are used as rental properties throughout the County. In both instances, the data reinforce the trend that rental housing is becoming a larger share of the County’s housing supply and that will continue into the future. Because of this uneven distribution of housing types, the share of renter-occupied units differs by submarket. Not surprisingly, the I-95 submarket carries a larger share of rental housing and thus has become the primary location for renters.

Figure 2-5

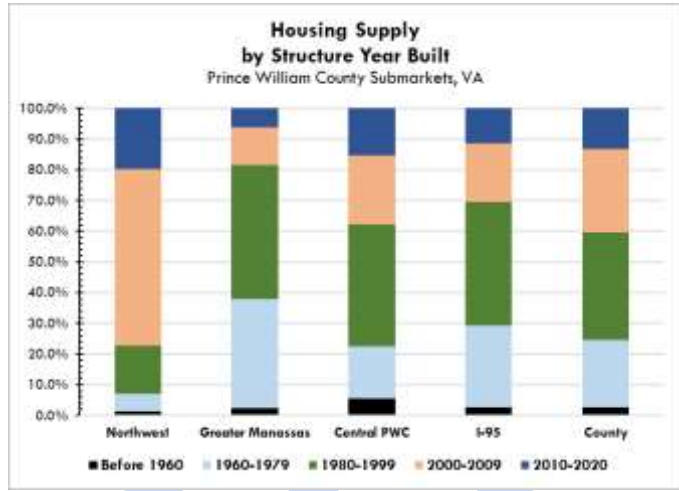


Note: * Including Manassas City and Manassas Park City, excluding Quantico
 Source: ACS 2019 5-Year Estimates. ACS 2010 5-Year Estimates and RKG Associates, Inc., 2021

3. Age of Housing Stock

While Prince William County was originally established in 1731, only 2.7% of all existing housing was built before 1960 (not including the Greater Manassas submarket). This indicates that much of the residential development visible today was constructed over the past sixty years. According to the County’s property assessment database, over 77% of the housing units have been constructed in just the past 40 years, and 43% since 2000. In this regard, Prince William County has a relatively new inventory of housing, with much of it being first- or second-generation housing.

Figure 2-6



Source: Prince William County VA Property Assessment Data and RKG Associates, Inc., 2021

As stated previously, the fastest growing submarket in Prince William County is the Northwest area, which has the greatest share of housing (77%) built since 2000, followed by the Central PWC at 37.7%. The I-95 submarket saw much of its housing (66.9%) constructed between 1960 and 1980. Over 79% of units in the Greater Manassas submarket fall into this same range. In both instances, the consultants observed declining housing conditions in many older neighborhoods in these two submarkets. A value/condition analysis conducted by RKG Associates confirmed these in-field observations and is presented in Chapter 4 - Naturally Occurring Affordable Housing.

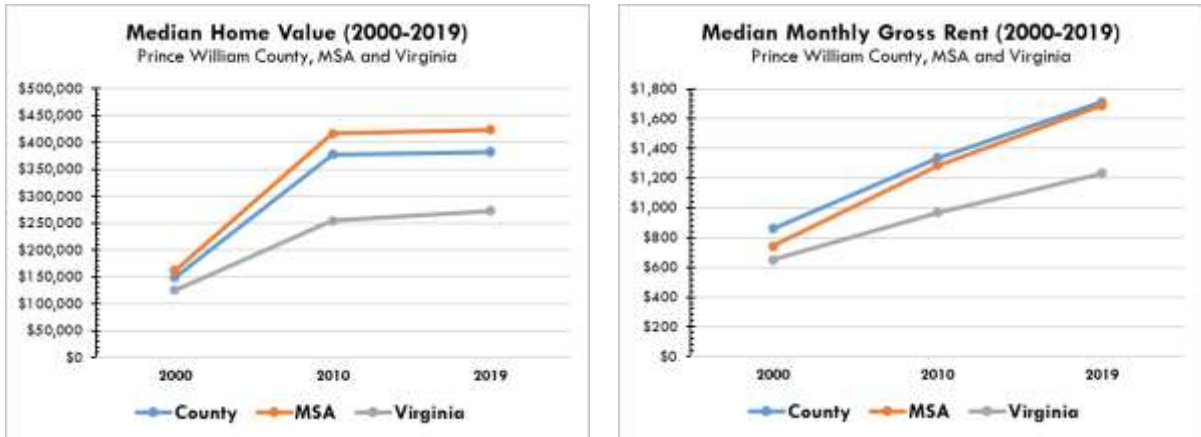
4. Housing Ownership and Rental Pricing Trends (2000-2019)

The U.S. Census asks census respondents about the current value of their homes and what they pay for monthly contract rent. While not always the most reliable measure of housing value changes, it is one measure that can capture relative changes over time across different areas. This data were not available at the submarket level, but RKG compared the County against the MSA and the Commonwealth of Virginia. Prince William County has remained on par with the MSA region in terms of housing values and rental rates. After a period of rapid value escalation during the 2000-2010 period, when the County’s home values increased an average of 15.2% annually, home price growth has moderated over the past decade (Figure 2-7).

However, it should be noted that over the past 18 months, housing production has increased rapidly during a period of record low mortgage interest rates. This has resulted in a spike in housing values, sales prices, and rents. At the same time, the COVID-19 pandemic has seen an exodus of urban dwellers moving out of Washington, DC, and some inner suburbs into Prince William County. This has been confirmed by local real estate developers/builders and

has resulted in increased housing demand that has further pushed up housing prices and values.

Figure 2-7



Source: American Community Survey, Decennial Census and RKG Associates, Inc., 2021
 Note: * The 2000 MSA is the Washington--Baltimore, DC--MD--VA--WV CMSA (instead of the Washington-Arlington-Alexandria, DC-VA-MD-WV Metro Area for the 2010 and 2019 data) due to Decennial Census data availability

RKG Associates analyzed the 2020 average assessed values for several housing types in the County and the four submarket areas. These residential properties reflect the value of newer residential development constructed between 2010 and 2020 and have a considerably higher value than the Census data reported above. The average single-family values are seen in the Northwest submarket at over \$601,000, which is \$20,000 higher than the County average of \$581,834. The Northwest has higher residential value for all housing types. The I-95 submarket shows well for townhouses and low-density condominiums (Table 2-7).

Table 2-7
Assessed Value of Different Housing Types
Prince William County and Submarkets, Properties Built Between 2010 and 2020

Housing Type	Northwest	Greater Manassas	Central PWC	I-95	Prince William County
Single Family Detached	\$601,000	\$527,390	\$592,089	\$556,439	\$581,834
Townhouse	\$426,170	\$376,382	\$378,354	\$402,411	\$403,776
Condominium - Low Density	\$323,505	\$309,656	\$282,381	\$312,476	\$314,719

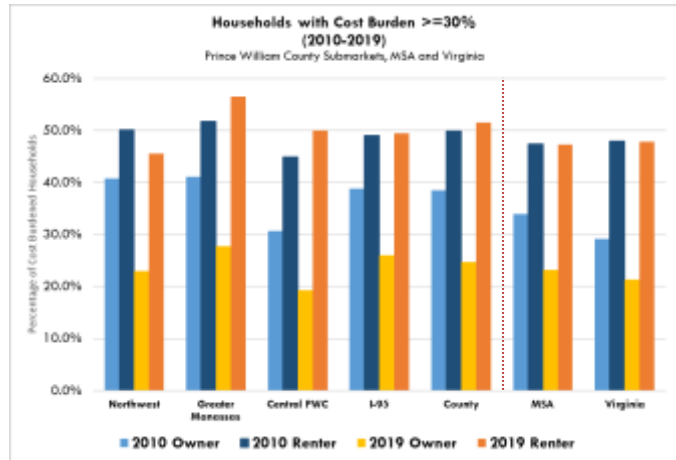
Source: Prince William County Assessor's Records (2020) and RKG Associates, Inc., 2021

5. Cost-Burdened Households

At the intersection of housing costs and household income is the concept of “housing cost-burdening.” HUD defines cost-burdened households as those who pay more than 30 percent of their gross monthly income for housing and may have difficulty affording necessities such as food, clothing, transportation, and medical care. Severe cost-burdening is defined as paying more than 50 percent of one's income on housing expenses. Figure 2-8 shows that owner-occupied households have improved their standing relative to affording their monthly housing costs.

In 2010, over 38% of Prince William County households paid more than 30% of their gross incomes on housing expenses, including mortgage payments, taxes, and insurance. By 2019, only 23% of owner households were classified as cost-burdened. The Central PWC had the lowest level of owner cost-burdening in both years, demonstrating a closer balance between housing values and household incomes in that submarket. However, the same cannot be said for renter households. In 2010, roughly 50% of the County’s renter households were cost-burdened, led by the Northwest and I-95 submarkets. By 2019, the percentage of cost-burdened renters had increased to 51.5% Countywide, and only Northwest renters improved their position over the decade. All other submarkets had over 50% cost-burdened renter households.

Figure 2-8



Note: * Including Manassas City and Manassas Park City, excluding Quantico
 Source: ACS 2019 5-Year Estimates, ACS 2010 5-Year Estimates and RKG Associates, Inc., 2021

