



**REGIONAL WORKFORCE
COUNCIL
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NOVA | Northern Virginia
Community College



MIGRATION PATTERNS

Census Bureau County to County Migration Flows

Population Estimates

Tax Return Migration Data

2 CENSUS BUREAU DATA SOURCES

▶ Population Estimates Program

- ▶ *2018 is most recently available data*
- ▶ *2019 data will be released in spring 2020*
- ▶ *Annual estimates of population changes by county, state, metro, and national since the last census & provides the reason for change (birth rate, death rate, in-migration, out-migration)*
- ▶ *“What is the population and how did it grow/shrink?”*

▶ Migration Flows

- ▶ *Derived from the American Community Survey (ACS)*
- ▶ *5-year estimates from survey data*
- ▶ *2013-2017 are most recent available data*
- ▶ *Tracks flows between counties, states, metros, and place of birth*
- ▶ *“Where did people move to/from?”*

POPULATION ESTIMATES, 2018

	Arlington	Alexandria	Washington MSA	Virginia
Pop Change, 2017-2018	+2,400	+876	+49,949	+52,478
Natural Increase	+2,307	+1,937	+40,778	+30,750
Domestic Migration	-1,950	-3,386	-30,581	-9,831
International Migration	+2,314	+2,335	+39,621	+31,641

DOMESTIC MIGRATION 2011-2018

	2011	2012	2013	2014	2015	2016	2017	2018
Arlington	2,899	935	-437	-3,537	-2,072	-1,936	-987	-1,950
Alexandria	12	-1,232	-1,463	-2,635	-2,250	-1,373	-1,756	-3,386
Fairfax County	-788	-4,109	-6,301	-16,835	-18,194	-17,557	-15,380	-14,334
Loudoun County	4,991	5,005	6,423	5,879	5,244	5,028	5,377	3,793
Washington MSA	23,743	6,638	3,203	-21,881	-32,748	-31,432	-21,943	-30,581
Virginia	12,030	5,020	3,217	-15,804	-25,452	-24,951	-12,485	-9,831

MIGRATION FLOWS (2013-2017 EST.)

Flowsmapper.geo.census.gov

	Movers In, Out of State	Movers In, Virginia	Movers Out, Out of State	Movers Out, Virginia	Movers from Abroad
Alexandria City	10,001	9,382	10,422	10,396	4,358
Arlington	15,576	8,535	15,388	13,205	5,122
Fairfax County	39,615	31,742	43,201	42,788	18,965
Loudoun County	9,448	14,370	12,605	11,051	4,878
Prince William County	12,927	17,901	15,167	19,767	4,277
District of Columbia	54,722	N/A	60,873	N/A	10,800

METRO-TO-METRO MIGRATION

	Flow to D.C.	Flow Out of D.C.	Net Migration
New York City	16,310	10,645	5,665
Los Angeles	3,720	4,512	(792)
Chicago	4,223	3,635	588
Dallas	2,858	3,246	(388)
Houston	1,475	4,033	(2,558)
Seattle	1,792	2,544	(752)
Atlanta	4,686	3,844	842
Charlotte	1,563	2,438	(875)
Denver	1,826	3,518	(1,692)
Austin	1,420	1,721	(301)
Richmond	7,250	10,227	(2,977)
Baltimore	23,546	26,098	(2,552)

BIGGEST “PEOPLE COMPETITORS” SCORE: 153 VS. 216 (D.C. LOSS)

We Steal From

New York City – 5,665

Philadelphia – 1,311

San Juan PR – 930

Atlanta – 842

Anchorage – 720

Honolulu – 710

Chicago - 588

They Steal Ours

Richmond – 2,977

Blacksburg VA – 2,760

Houston – 2,558

Baltimore – 2,552

Virginia Beach – 2,404

Harrisonburg – 2,246

Hagerstown – 2,110

Charlottesville – 2,008

Denver – 1,692

Salisbury MD – 1,484

Raleigh – 1,278

San Francisco – 1,018

TAX RETURN DATA

- ▶ The IRS also tracks migration flows based on address changes from U.S. tax returns
- ▶ Most recently available data is the change from 2017-2018 tax years
- ▶ Published by state-to-state and county-to-county
- ▶ Only counts persons filing a U.S. tax return

TAX RETURN DATA

#s represented are tax returns filed, 2017-2018

	Arlington	Alexandria	Fairfax	Virginia
NO CHANGE	90,095	60,660	418,618	2,958,314
Moved In-state, net change	1,769 LOST	859 LOST	3,701 LOST	190,842 MOVED AROUND STATE
Moved Out-of- state, net change	565 LOST	224 NEW	1,771 LOST	4,707 LOST
Moved Out-of- country, net change	7 NEW	17 NEW	323 LOST	690 NEW
Total Net Change	2,327 LOST	618 LOST	5,795 LOST	4,017 LOST

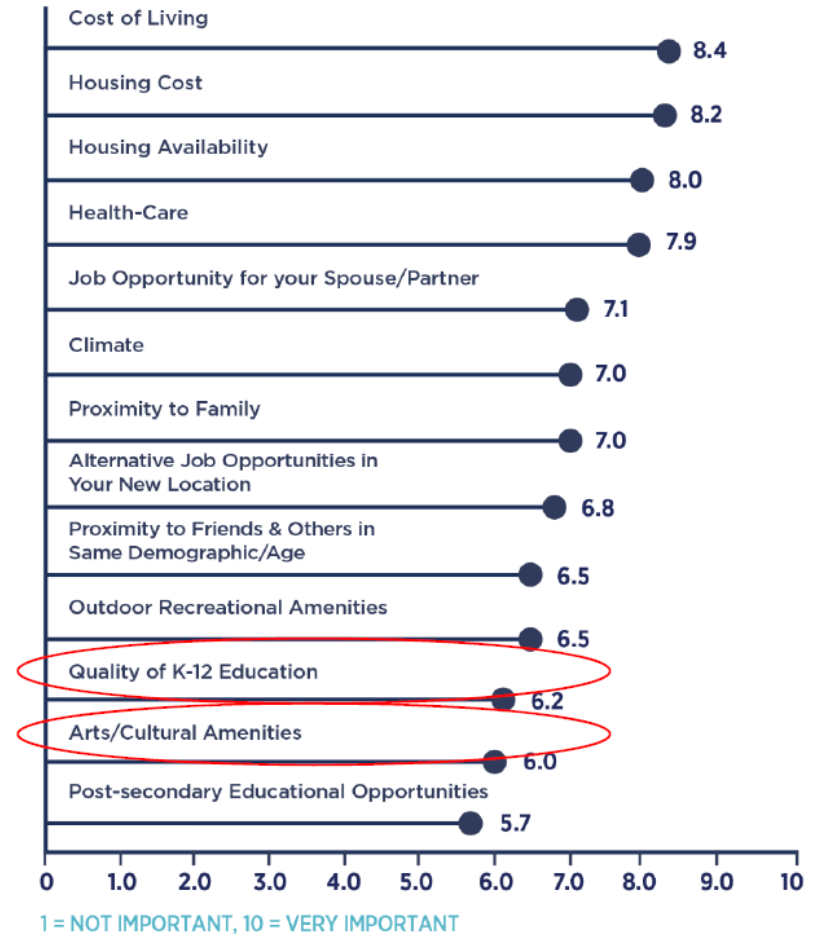
WHY DO PEOPLE MOVE?

Survey from Deloitte Consulting, 2019

- ▶ 90% of working adults search for a new job at least 1x per year
- ▶ 46% of survey respondents are “somewhat likely” or “extremely likely” to relocate for a new job in the next 5 years
- ▶ Top factors in a new opportunity: salary, work-life balance, and company benefits.
- ▶ **Location of new job opportunity ranked #6 out of 10 in importance**

HOW DO THEY CHOOSE WHERE TO MOVE?

TOP FACTORS IN LOCATION DECISIONS



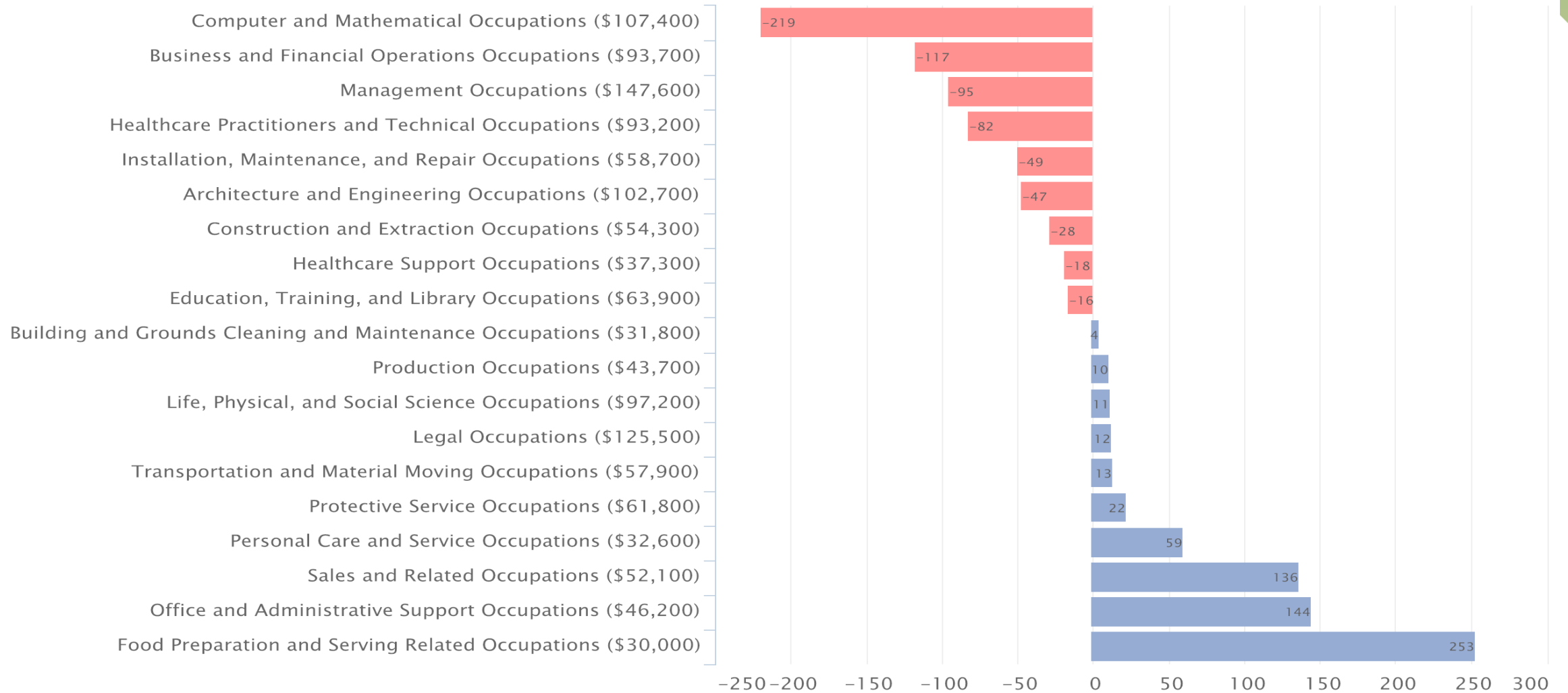
RETRAINING OCCUPATIONS AFFECTED BY ADVANCES IN TECHNOLOGY



OCCUPATION GAP ANALYSIS

Occupation Gaps

Potential Average Annual Occupation Gaps over 10 Years in Alexandria / Arlington



Source: JobsEQ®, Data as of 2019Q2 except wages which are as of 2018

AUTOMATION RISK- IN DEMAND

Occupation	# Employed	Job Postings 2018	Growth, Last 5 Years	Average salary
Secretaries/Admin Assistants	5,264	2,175	-2.5%	\$52,800
Retail Salespersons	4,608	1,939	-2.2%	\$31,000
Accountants and Auditors	3,747	1,795	3.6%	\$92,100
Hotel Desk Clerks	855	810	-0.7%	\$30,000
Waiters and Waitresses	5,509	789	0.4%	\$30,000
Bookkeeping Clerks	3,350	782	0.5%	\$51,300
Executive Assistants	1,206	721	-11.0%	\$71,100
Food Prep and Serving Workers	1,316	624	1.0%	\$26,300
Technical Writers	348	560	0.8%	\$87,600
Real Estate Sales Agents	844	489	-0.8%	\$63,500

OTHER HIGH-RISK AUTOMATION OCCUPATIONS

- Cooks, Restaurant
- Office Clerks
- Receptionists
- Medical Records Clerks
- Production and Planning Clerks
- Paralegals and Legal Assistants
- Budget Analysts
- Driver/Sales Workers
- Insurance Sales Agents
- Cashiers
- ▶ Inspectors, Sorters, Weighers
- ▶ Dining Room Attendants
- ▶ Hosts and Hostesses
- ▶ Counter Attendants
- ▶ Human Resources Assistants
- ▶ Payroll Clerks
- ▶ Parking Lot Attendants
- ▶ Bank Tellers
- ▶ Bakers
- ▶ Loan Officers

HIGH GROWTH OPPORTUNITIES

Occupation	# Employed	Job Postings 2018	Projected Growth	Average salary
Software Developers, Applications	4,577	7,364	3.1%	\$118,600
Management Analysts	8,628	4,205	1.3%	\$107,300
Market Research Analysts/Marketing Specialists	2,729	1,003	2.3%	\$79,300
Janitors and Cleaners	6,517	410	1.0%	\$30,400
Information Security Analysts	1,213	3,293	3.3%	\$115,600
Personal Care Aides	1,656	180	2.3%	\$27,500
Computer Systems Analysts	2,873	1,795	1.3%	\$106,100
Sales Reps, services	3,208	805	1.2%	\$82,800
Computer Support Specialists	2,297	2,108	1.4%	\$64,600
Registered Nurses	3,836	2,445	0.8%	\$82,200