FAIRFAX COUNTY

HOUSING ACTION PLAN

COG Joint Housing and Planning Directors Advisory Committee Meeting

September 10, 2026

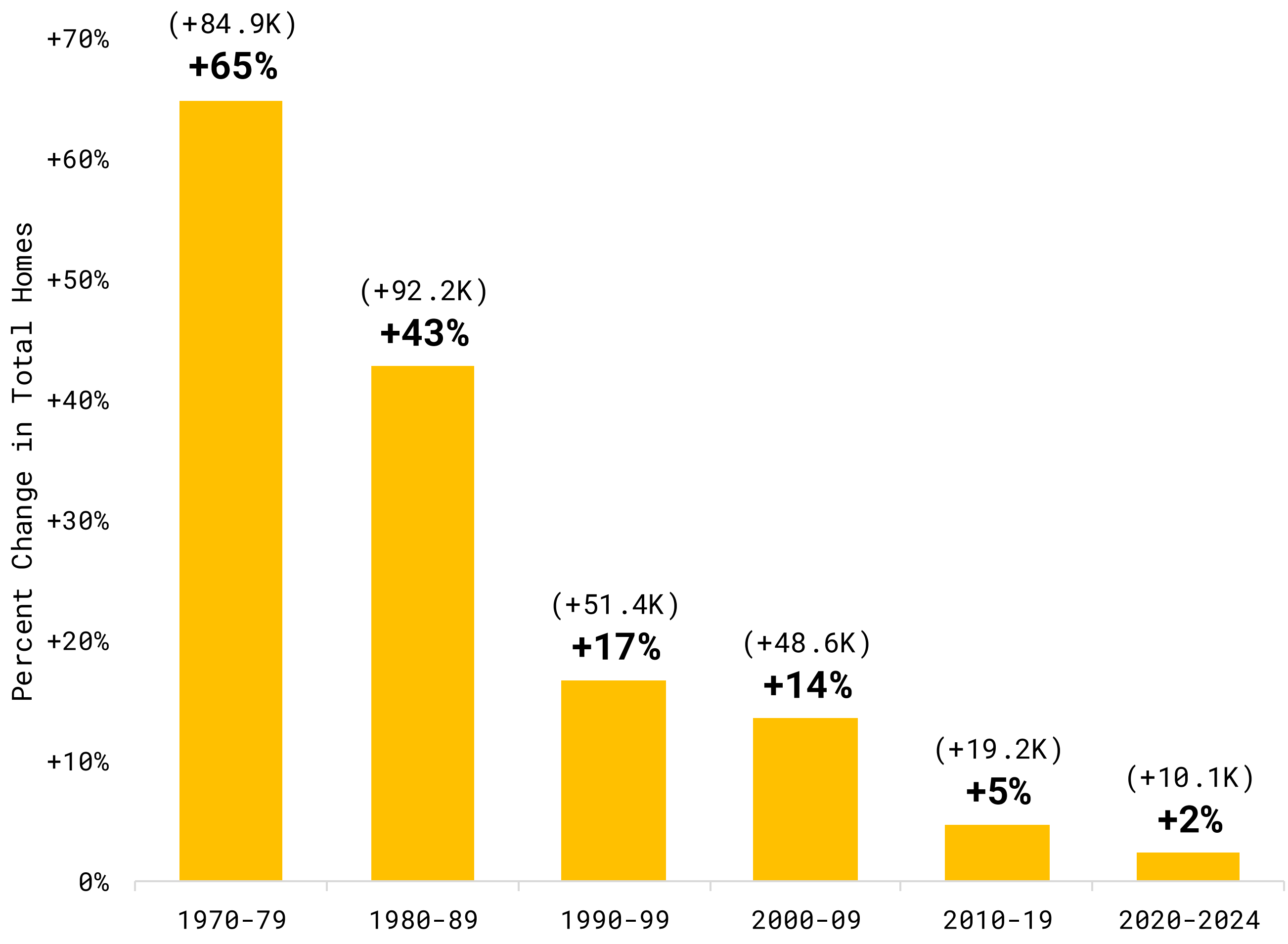
PACE OF BUILDING HAS COLLAPSED

Building many new homes helped fuel Fairfax County's rapid economic growth in the 1970s and 1980s. But the County has produced far less housing in the decades since then.

As measured by the percent change in total homes decade-over-decade, **the rate of new construction fell by more than half from the 1980s to 1990s—and fell by more than half again during the Great Recession**.

The slowdown in home construction, even since the 1990s and 2000s, hinders Fairfax County's continued economic growth.

Home Supply Growth by Decade



Sources: Decadal census data accessed from IPUMS NHGIS for 1970-2020, and Address Count Listing File data from U.S. Census Bureau for 2024.

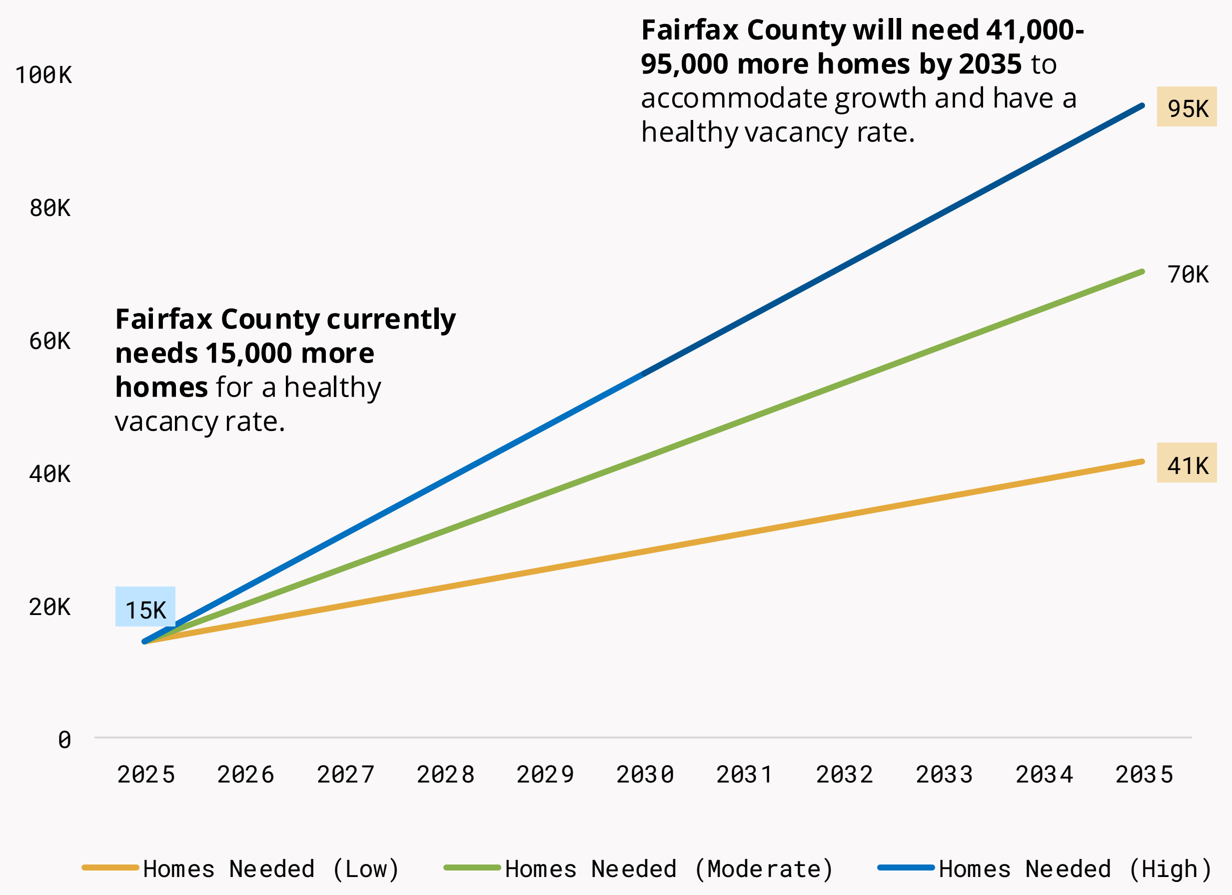
Note: Data accounts for all housing units, excluding group quarters. The pace of housing supply growth for 2020-24 is about on par with the previous decade (2010-19).

FAIRFAX COUNTY WILL NEED 41K-95K NEW HOMES BY 2035

A healthy housing market needs about 5% of all homes to be vacant and available. These available homes allow households to move for jobs, start families, or otherwise relocate. At present, **Fairfax County needs 15K more homes to achieve a healthy 5% vacancy rate.**

To account for projected demand from new households, **Fairfax County will require 41K-95K total new homes by 2035**, including current need and accounting for a 5% target vacancy rate for projected future households.

New Homes Needed by 2035



Sources: HR&A analysis of American Community Survey (ACS) 1-Year Estimates and HR&A household projections based on analysis of Cooper Center and HR&A population projections.

Note: Assumes a target vacant availability rate of 5%. The new homes needed are the additional homes needed so that vacant and available (i.e., for rent and for sale) homes equal 5% of the sum of occupied homes (i.e., total households or projected total households) plus vacant and available homes.

Task Force Problem Statement

Fairfax County faces a critical gap between community need and housing supply, requiring coordinated action to reduce the shortage, attract and retain workers, and sustain our community’s economic health and competitiveness.

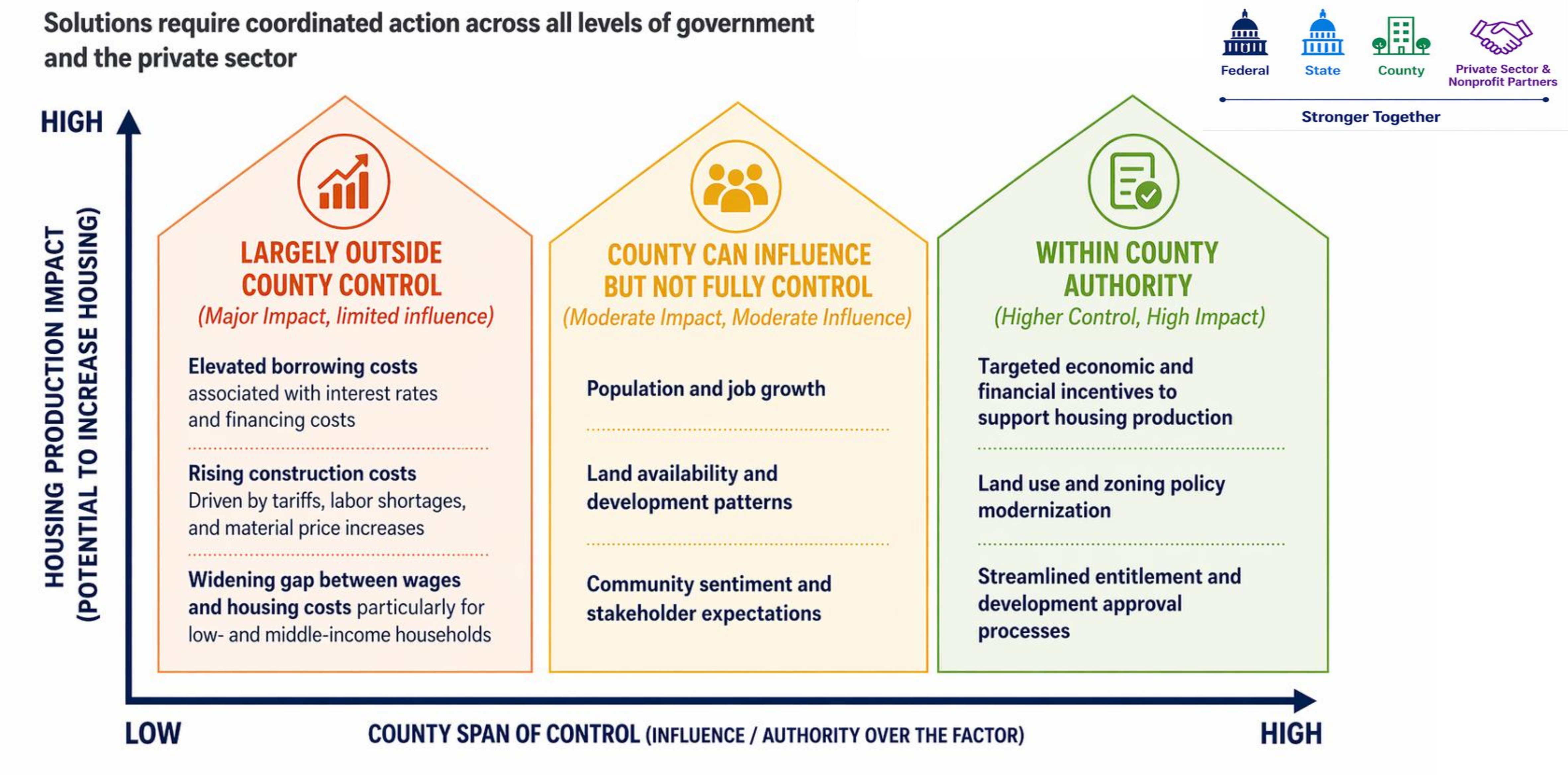
Vision

Residents across all income levels and life stages have housing options in Fairfax County.

Core Mandate

Develop a comprehensive, multi-departmental roadmap to increase housing production, streamline development processes, and expand housing opportunities across the housing continuum by Spring 2026.

The crisis exceeds the capacity of any single locality or industry



Fairfax County Housing Trends

Highlights from our Housing Needs Assessment, published April 2026

Housing production has not kept pace with job growth

Housing costs have grown faster than incomes.

The greatest affordability challenge is among lower-income households.

2.3 Jobs per new home

Added from 2015-2025
Healthy markets are closer to 1.5.

13,800

Rental Homes short for households
at or below 60% AMI

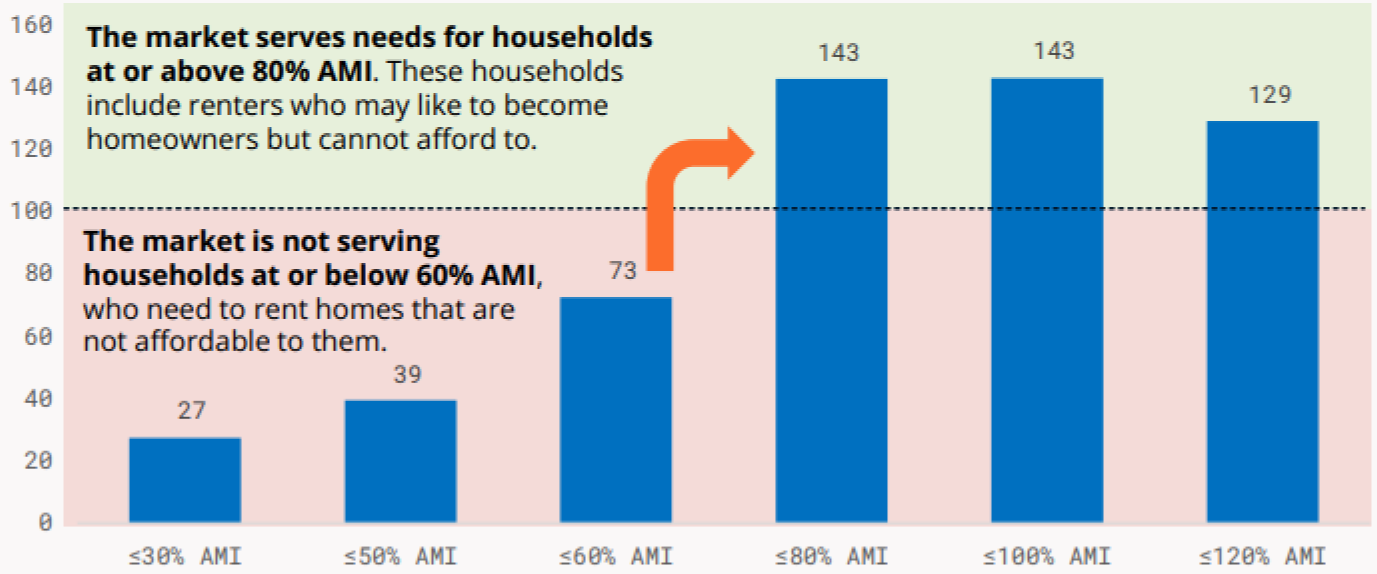
$2,500

Typical Market Rent
~100k income needed

$770K

Median Home Price
~ 230K income needed

Affordable Rental Homes per 100 Renter Households (AMI), 2023



Source: U.S. Census Bureau, Public-Use Microdata Sample (PUMS), 5-Year Estimates.

Housing Goal: 10,000 Net New Affordable Units

Board of Supervisors

Appoints

11 Commissioners

Department of Housing and Community Development

Developer

County Program Administrator

Lender/ Investor

Landlord/ Ground Lessor

Moving to Work Agency

Bond Issuer

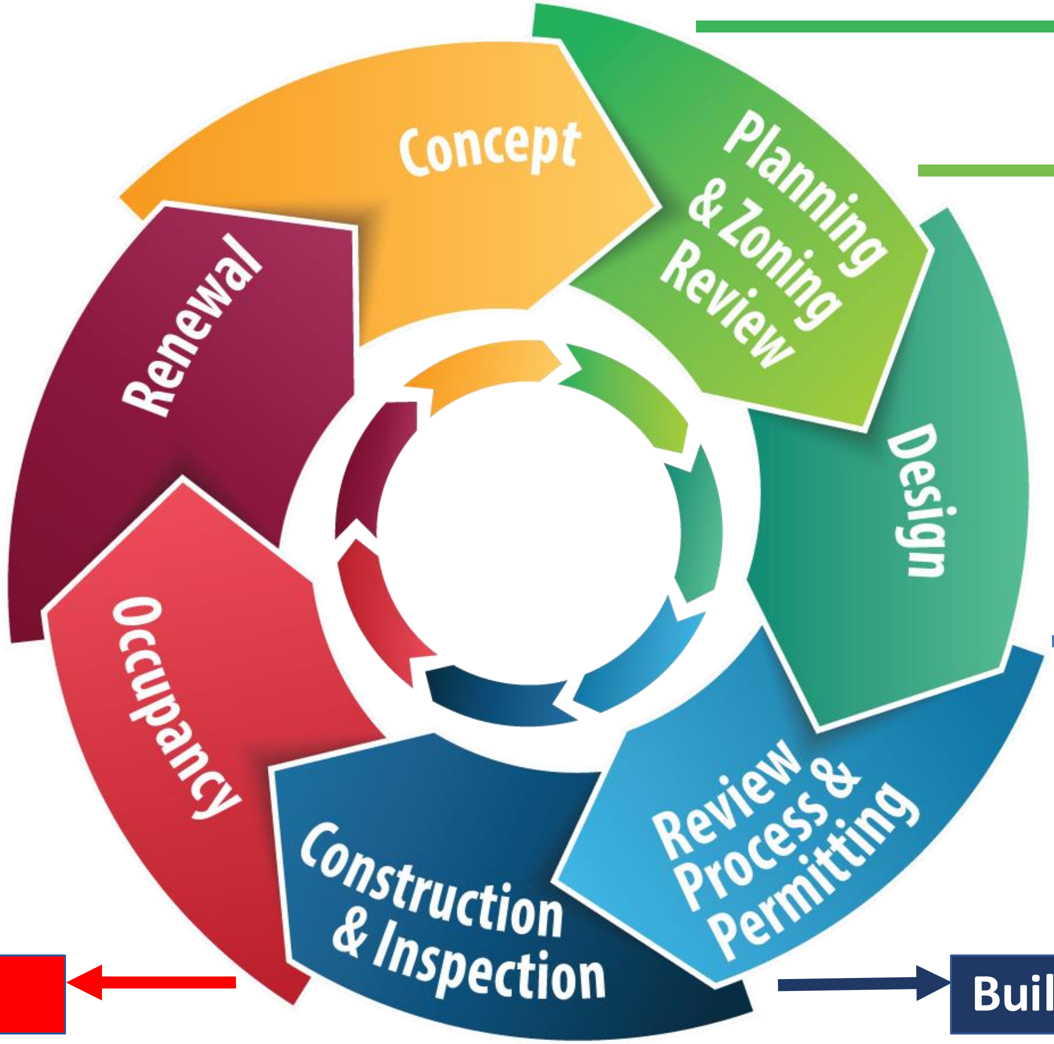
Asset Manager

Voucher Administrator

Grantmaker

Land Development in Fairfax County

The land development process covers the lifecycle of the built environment over many years and involves many partner agencies.



Comprehensive Plan

Zoning/Entitlement

PLANNING & DEVELOPMENT

Site/Subdivision Plan

Building Permit

Occupancy Permit

FAIRFAX COUNTY LAND DEVELOPMENT SERVICES

Framing Solutions to Expressed Challenges

POLICIES & REGULATIONS	• Encourage New Housing Development • Simplify Requirements and Improve Transparency
AFFORDABILITY	• Create Policies to Defray Affordable Housing Cost • Expand the Suite of Affordable Housing Tools
PROCESS	• Improve Coordination in Development Review • Foster More Collaborative Culture

Encourage New Housing Development

- **Suburban Village Centers Policy:** New housing in existing commercial centers
- **Compact Housing Village Policy:** New clustered, small single-family housing
- **Accessory Living Unit ZOA:** Additional flexibility and streamline process
- **Congregate Living ZOA:** Expansion of congregate living facilities locations

Simplify Requirements and Improve Transparency

- **Affordable Dwelling Unit Zoning Ordinance:** Update to improve review
- **Comprehensive Plan Flexibility and Alignment:** Add more flexibility

Create Policies to Defray Affordable Housing Cost

- **Consider alternative expectations** for affordable housing projects
- **Institute Special Exception for Affordable Housing** to allow increased density
- **Update Comprehensive Plan** and Incentive Packages for Affordable Housing

Expand the Suite of Affordable Housing Tools

- **Develop New FCRHA Financing Products**
- **Consider Real Property Tax Incentives for** new construction and preservation
- **Institute New Purchase Assistance Programs**
- **Expand First Time Homebuyer Preparation Resources**

Improve Coordination in Development Review

- **Expand Land Development Services Project Management Role**
- **Increase Transportation Communication** (FCDOT and VDOT)
- **Optimize Transportation Analysis**

Foster More Collaborative All-Parties Culture

- **Enhance Community Engagement** through consistency, intentionality, inclusivity
- **Advance Employer Partnerships for Workforce Housing to** leverage employer insights and capacity to define workforce needs and housing tools

Four Messaging Buckets

PRODUCTION

Fairfax County Needs Housing Solutions.

We have produced jobs more quickly than new homes. People who work here find it difficult to live here.

SOLUTIONS

Fairfax County's Top Priority is Housing Solutions

Fairfax County wants to clear the path to more housing production by reducing regulatory barriers and allowing additional density to drive down the cost per unit.

AFFORDABILITY

People at Lower Incomes are Feeling the Pinch

Housing attainable across the continuum of need ensures people who want to work in Fairfax County can live in Fairfax County.

BENEFITS

Overcoming the housing crisis uplifts everyone in Fairfax County

Everyone benefits: homeowners and taxpayers, local businesses and employers; young adults and older adults; and everyone in-between.

Resources

Published content can be found on our website: https://www.fairfaxcounty.gov/topics/housing-solutions

FAIRFAX COUNTY

HOUSING ACTION PLAN

Report by the Fairfax County Housing Task Force

April 2026

Housing solutions for every neighbor across Fairfax County

Breaking down barriers and building homes to keep our local economy strong and growing.

Share Resources

Use the Housing Solutions Communications Toolkit to access key facts and messages about Fairfax County's response to the housing shortage. Print and share handouts in multiple languages, and download social media graphics and copy posts to share to your channels.

THANK YOU

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