

2019 Fredericksburg Region Commuter Workforce Study

By Dr. Lance Gentry



Research Objectives

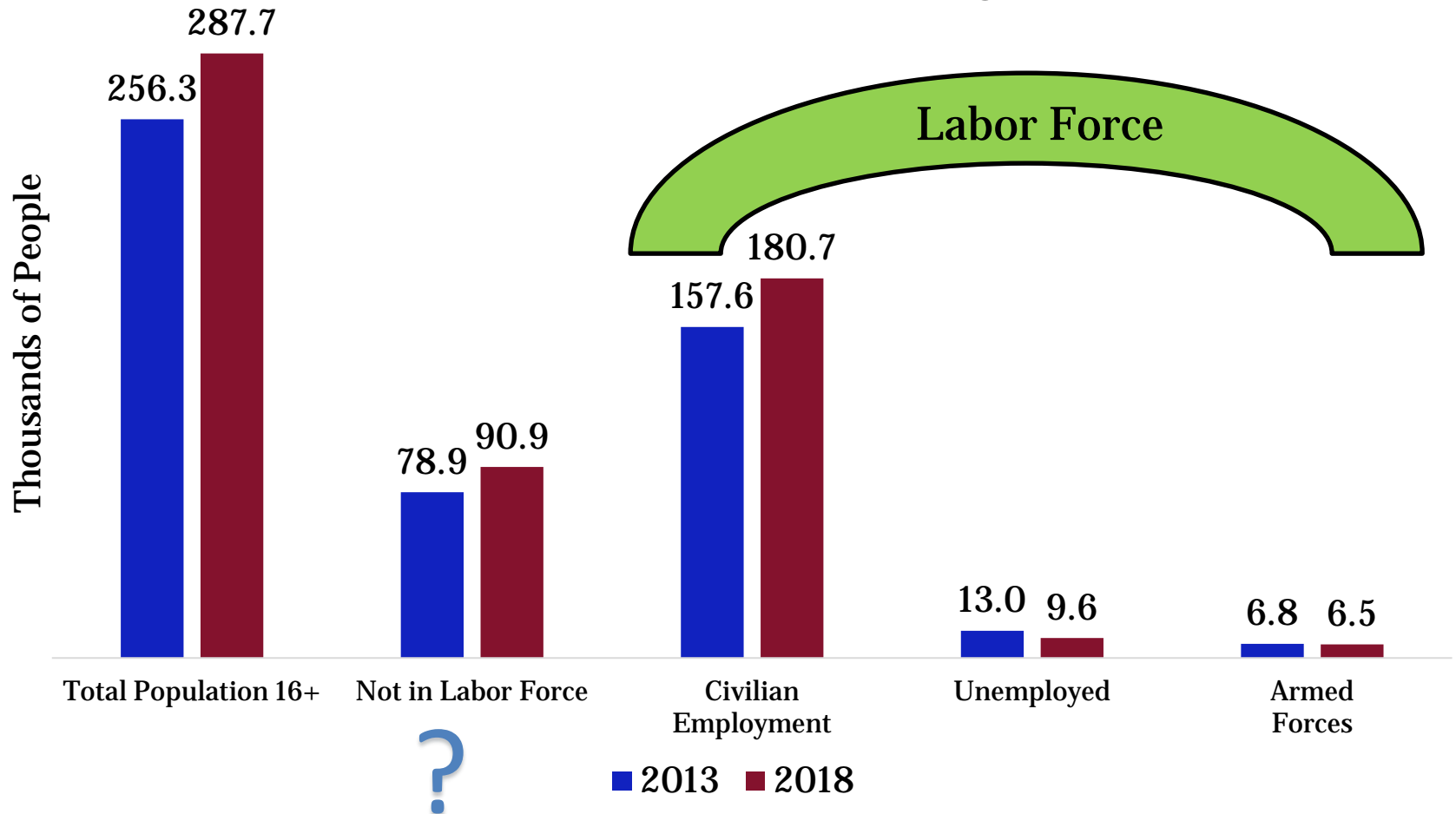
- The Fredericksburg Regional Alliance, the George Washington Regional Commission, and GO Virginia requested that UMW conduct a study of the commuter workforce.
- Two Objectives
 - Compare the people who lived in our region and worked outside it in 2013 (2016 study by Dr. Hansen) with current figures.
 - This project also looked at characteristics of our regional workforce – those who live and work in our region.

Data Collection

- American Community Survey (US Census)
 - 1% a year
 - More detailed questions
- Used ACS sample for percentages (2017 when sufficient data available, 2013-17 otherwise), and 2018 Census estimates for population figures
- Data was also obtained from JobsEQ, a data aggregation and compilation service, for Q1 2019 traffic data.

Regional Workforce Grew

2013 and 2018 Population 16 Years of Age and Older



Regional Workforce (2018)

Location	Total Population 16+	In Labor Force	Civilian Employment	Unemployed	Armed Forces
Caroline County	24,402	16,147	13,620	916	1,610
City of Fredericksburg	23,577	16,219	15,192	906	121
King George County	20,516	14,038	13,023	677	338
Spotsylvania County	104,169	70,669	66,414	3,840	416
Stafford County	115,019	79,703	72,471	3,228	4,005
Fredericksburg Region	287,683	196,776	180,720	9,567	6,490

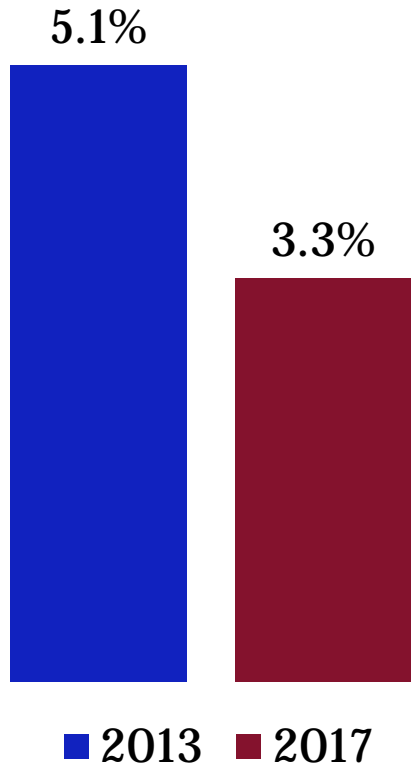
Participation Rate = In Labor Force / Total Population 16+

More Workers Despite Declining Labor Participation Rates

- **Labor Force Participation Rate continues to drop**
 - National average was 62.8% in 2016, expected to drop to 61% by 2026
 - Retirement of Baby Boomers is primary factor
 - Fredericksburg Region dropped from 69.2% in 2013 to 68.4% in 2017
 - City of Fredericksburg is notable exception; participate rate actually increased 3.3% since 2013 to 68.8%

More Workers: Unemployment Drops

Unemployment Rate (16+)



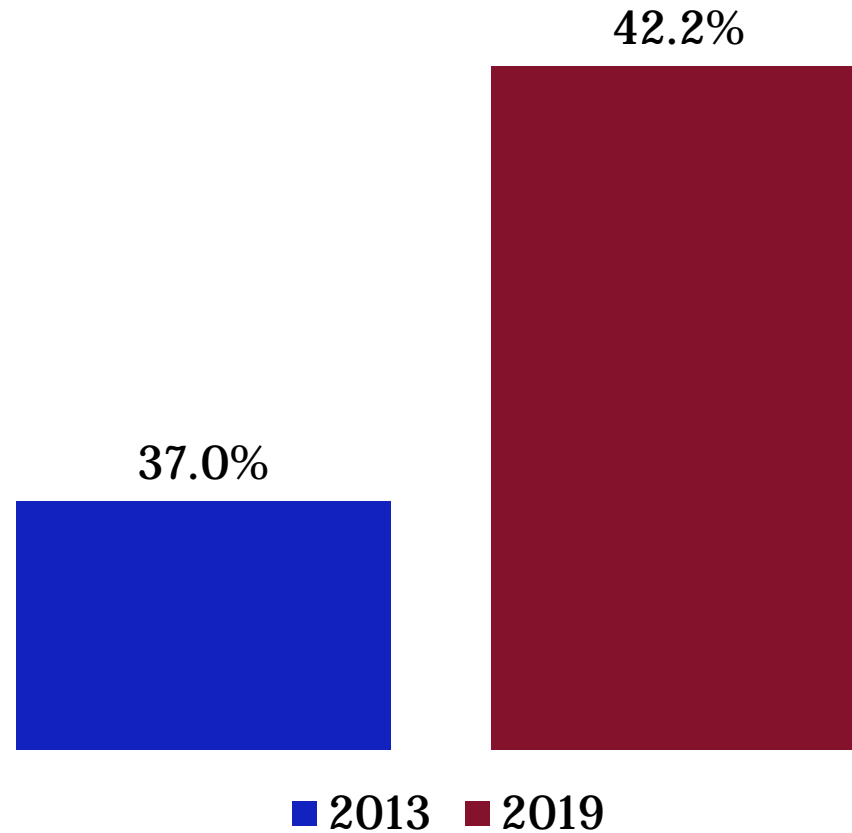
- The unemployment rate has dropped in every municipality within the Fredericksburg region since 2013.
- This is a 34.6% decrease in regional unemployment between 2013 and 2017.

Labor Force Participation: Rate of Change

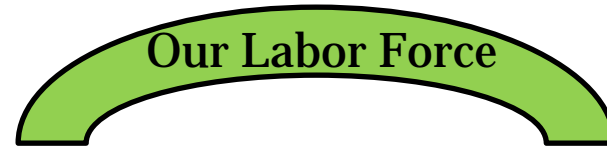
	Labor Force Participation			Unemployed		
	2013	2017	rate of change	2013	2017	rate of change
Caroline County	67.3%	66.2%	-1.7%	8.0%	3.8%	-53.3%
City of Fredericksburg	65.5%	68.8%	5.1%	7.1%	3.8%	-46.1%
King George County	69.8%	68.4%	-1.9%	4.8%	3.3%	-31.4%
Spotsylvania County	68.5%	67.8%	-0.9%	4.7%	3.7%	-21.7%
Stafford County	71.1%	69.3%	-2.5%	4.4%	2.8%	-36.2%
Fredericksburg Region	69.2%	68.4%	-1.2%	5.1%	3.3%	-34.6%

Where Does Our Labor Force Work?

Percent of Regional Workforce Commuting Outside
Fredericksburg Region



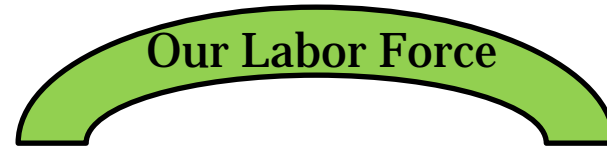
Where Does Our Labor Force Work?



		Commute From	Commute Within	
Caroline County		10,347	3,709	
City of Fredericksburg		8,507	6,268	
King George County		6,275	7,988	
Spotsylvania County		40,808	22,145	
Stafford County		49,516	23,410	
Fredericksburg Region		83,117	95,865	

The Fredericksburg Region is not a total of the five municipalities because someone who lived in Caroline County and worked in Fredericksburg would count as commuting from Caroline County, but commuting within the Fredericksburg Region.

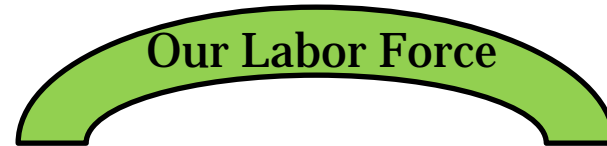
Where Does Our Labor Force Work?



	Commute To	Commute From	Commute Within	
Caroline County	2,874	10,347	3,709	
City of Fredericksburg	19,664	8,507	6,268	
King George County	4,694	6,275	7,988	
Spotsylvania County	18,273	40,808	22,145	
Stafford County	24,718	49,516	23,410	
Fredericksburg Region	37,866	83,117	95,865	

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Where Does Our Labor Force Work?



	Commute To	Commute From	Commute Within	Net Gain (Loss)
Caroline County	2,874	10,347	3,709	(7,473)
City of Fredericksburg	19,664	8,507	6,268	11,157
King George County	4,694	6,275	7,988	(1,581)
Spotsylvania County	18,273	40,808	22,145	(22,535)
Stafford County	24,718	49,516	23,410	(24,798)
Fredericksburg Region	37,866	83,117	95,865	(45,251)

An estimated 216,848 people regularly commute to, from, and within our region.

Top 20 Commuting Destinations of Regional Residents with Inflow - 2019

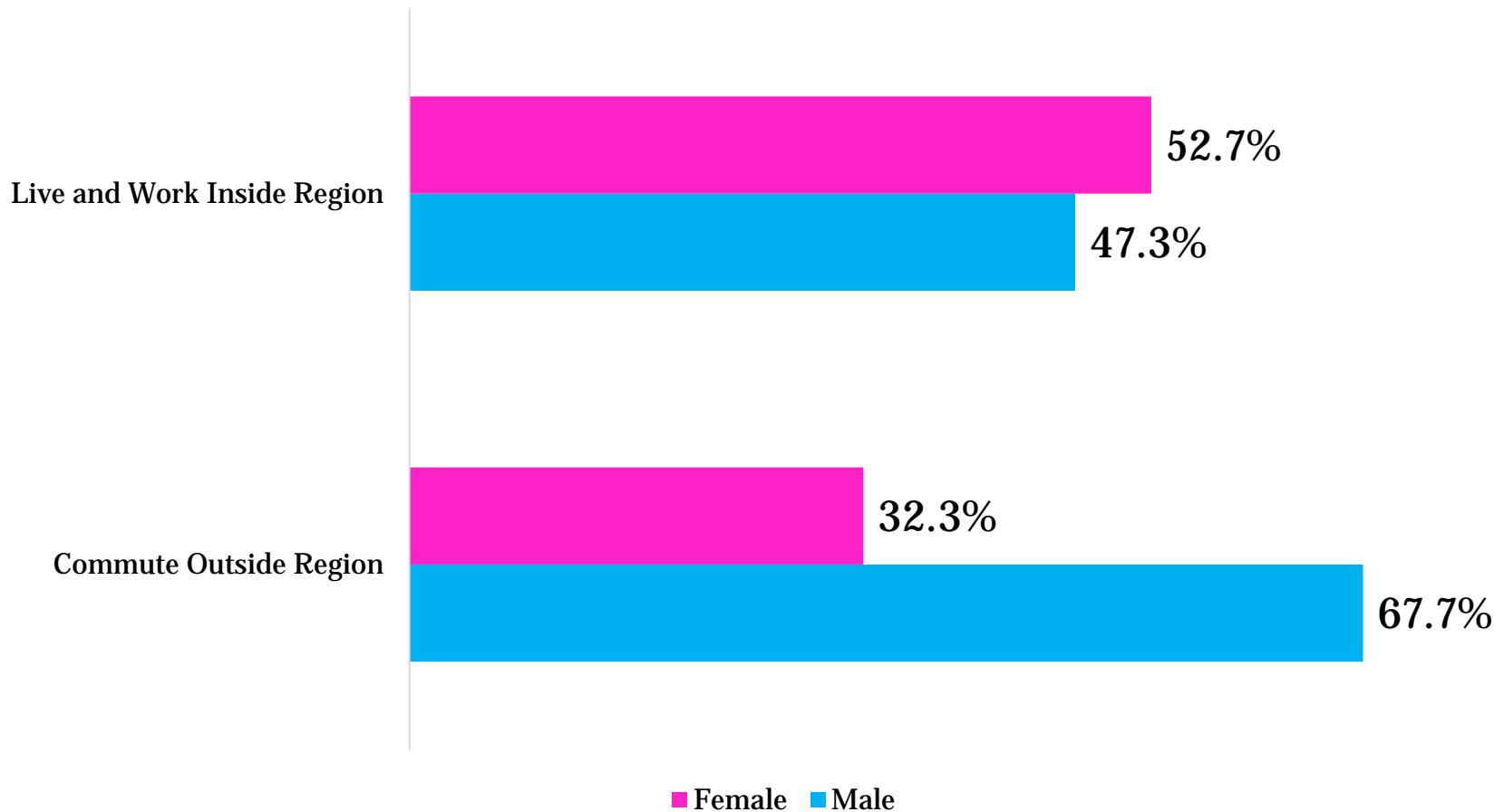
Region	Inflow	Outflow	Net Change
Fairfax County, Virginia	3,611	19,782	(16,171)
Prince William County, Virginia	5,633	11,089	(5,456)
District of Columbia Excluding Exceptions	385	8,032	(7,647)
Arlington County, Virginia	407	4,330	(3,923)
Henrico County, Virginia	1,303	3,427	(2,124)
Loudoun County, Virginia	2,262	3,139	(877)
Alexandria City, Virginia	425	2,596	(2,171)
Hanover County, Virginia	1,162	2,526	(1,364)
Richmond City, Virginia	689	1,700	(1,011)
Chesterfield County, Virginia	1,204	1,651	(447)
Prince Georges County, Maryland	830	1,480	(650)
Manassas City, Virginia	340	1,309	(969)
Fauquier County, Virginia	1,074	1,195	(121)
Charles County, Maryland	631	1,070	(439)
Culpeper County, Virginia	1,156	1,063	93
Montgomery County, Maryland	362	894	(532)
Albemarle County, Virginia	305	876	(571)
Virginia Beach City, Virginia	998	812	186
Orange County, Virginia	2,062	808	1,254
Norfolk City, Virginia	577	615	(38)
Other	12,450	14,723	(2,273)
Total (w/out those who live and work in region)	37,866	83,117	(45,251)

Estimated Mode of Travel for Fredericksburg Region Labor Force for 2018 (regardless of where they work)



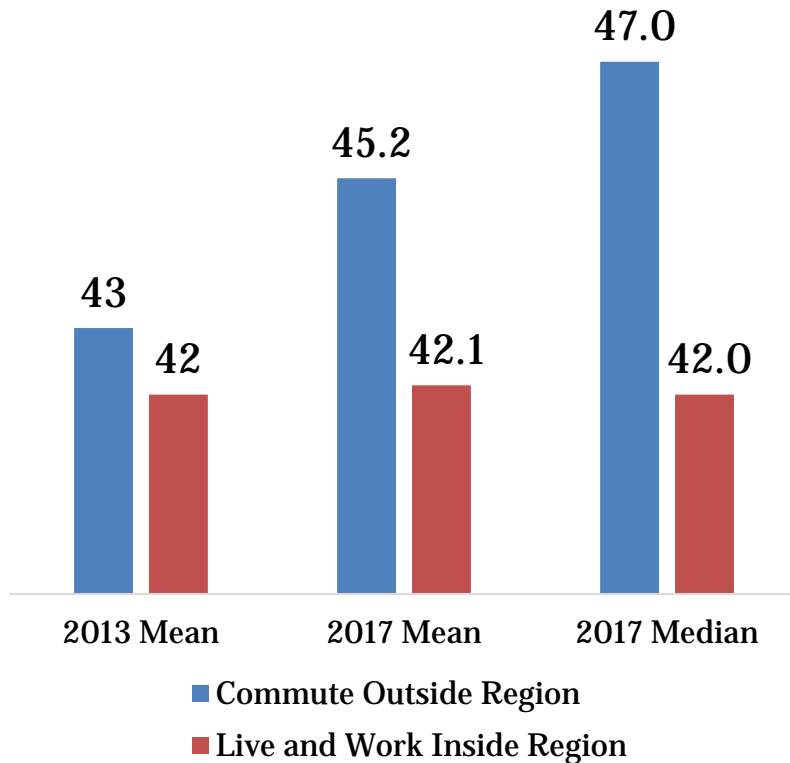
Commuting and Gender

2017 Work Force Gender by Commute Destination



Commuting and Age

Work Force Age by Commute Destination

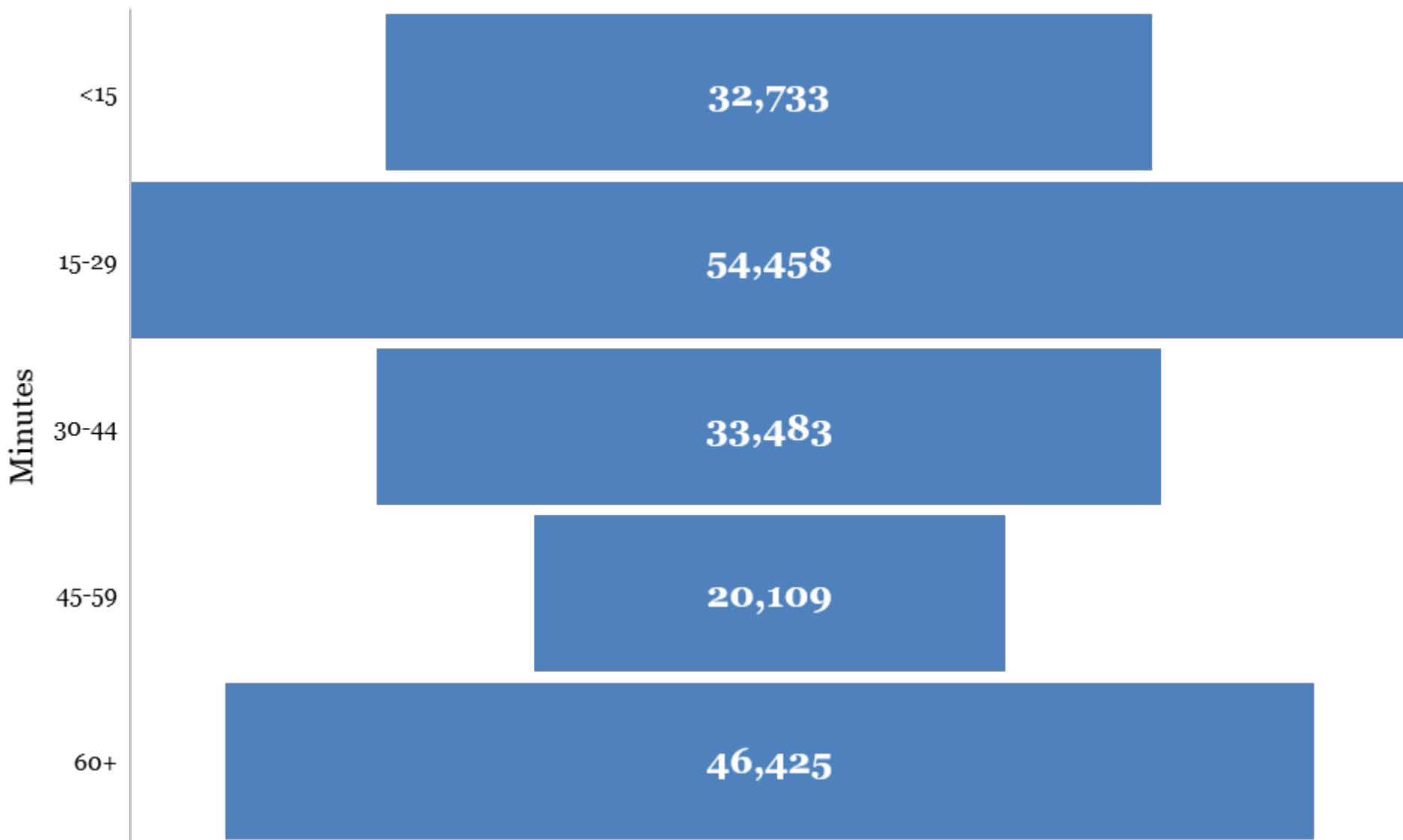


- Those who commute outside the region are slightly older than those who commute inside the region
- The age gap has increased from 2013 to 2017
 - The average age has not changed for those who live and work inside the region

Commute Time

- What is your *one-way* commute time?
- In 2018, the average travel time to work in the United States was 26.6 minutes
- In 2018, the average time for Virginian workers was 28.5 minutes
- What is it for our commuters?

Average *One-Way* Commute Times for Fredericksburg Area Workforce

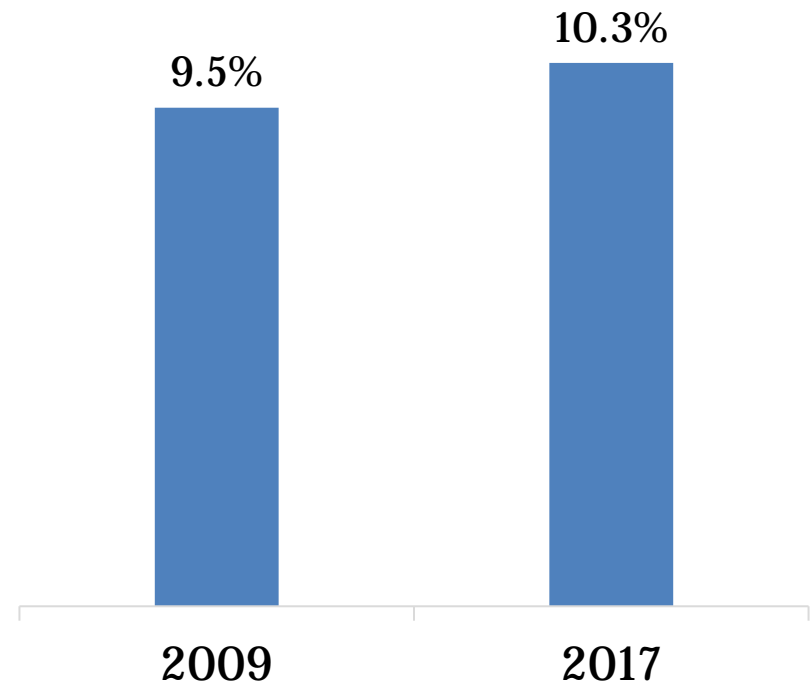


There is **much variance**, but the average one-way commute time for our workers was 38.2 minutes

Super Commuters

- Economists Igor Popov and Chris Salviati defined people that commute 90 minutes or more (one-way) as super commuters.
- *The median wage of super commuters is 20.9% greater than that of those who spend less than 90 minutes commuting each way.*

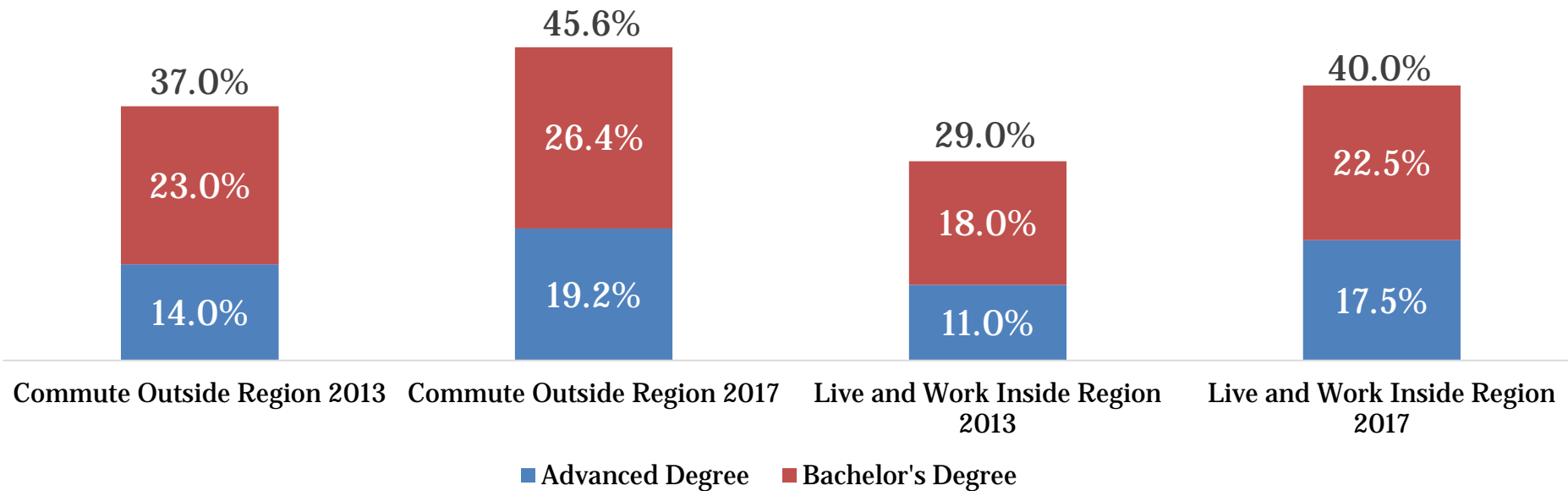
Super Commuters as a Share of Fredericksburg Region Workforce



Education (25+)

- How does our region compare to the general population in terms of education?
- In the US, 36.9% of adults have a bachelor's degree or better.
- In Virginia, 37.6% of adults have a bachelor's degree or better

Estimated 2017 Educational Attainment of Regional Residents (25 and Older)

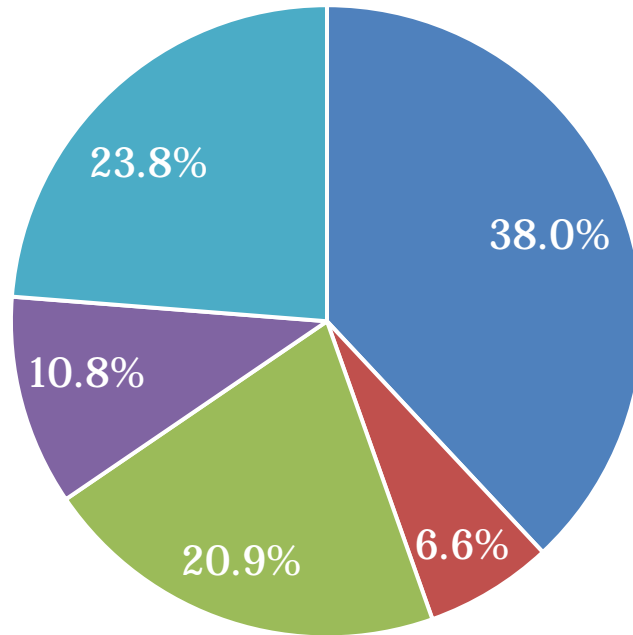


In 2013, the average educational attainment for those who lived and worked inside the region was below the Virginian and American averages.

In 2017, the average educational attainment for those who lived and worked inside the region was higher than the Virginian and American averages.

Education (25+)

Field of Bachelor's Degree for First Major (25+) 2018



■ Science and Engineering

■ Business

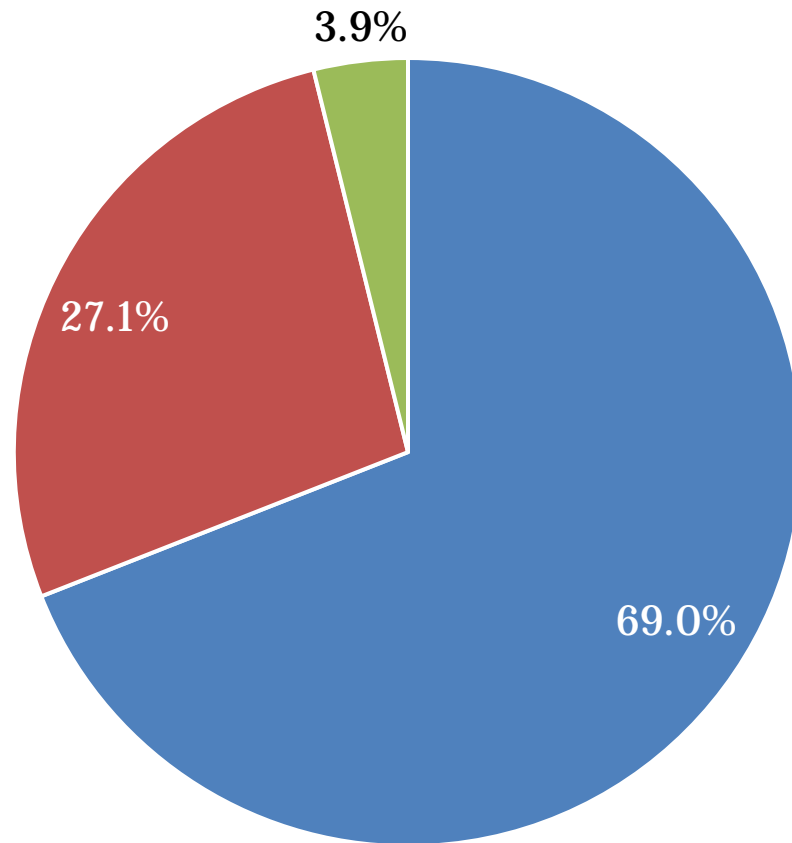
■ Arts, Humanities and Other

■ Science and Engineering Related Fields

■ Education

Employment: General Types

2018 Estimate of Type of Civilian Employment for Regional Workforce



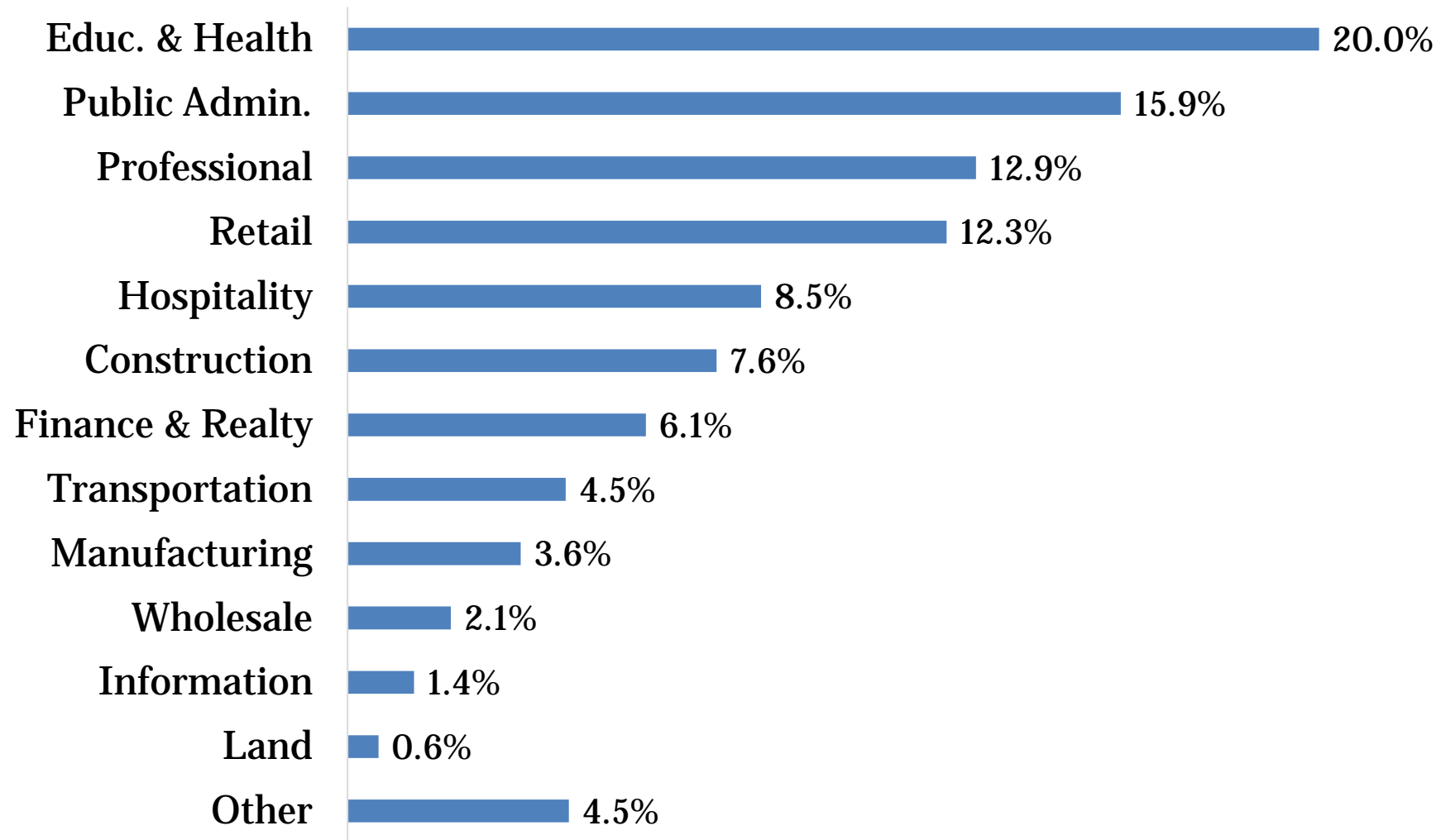
■ Private Wage and Salary Workers

■ Government Workers

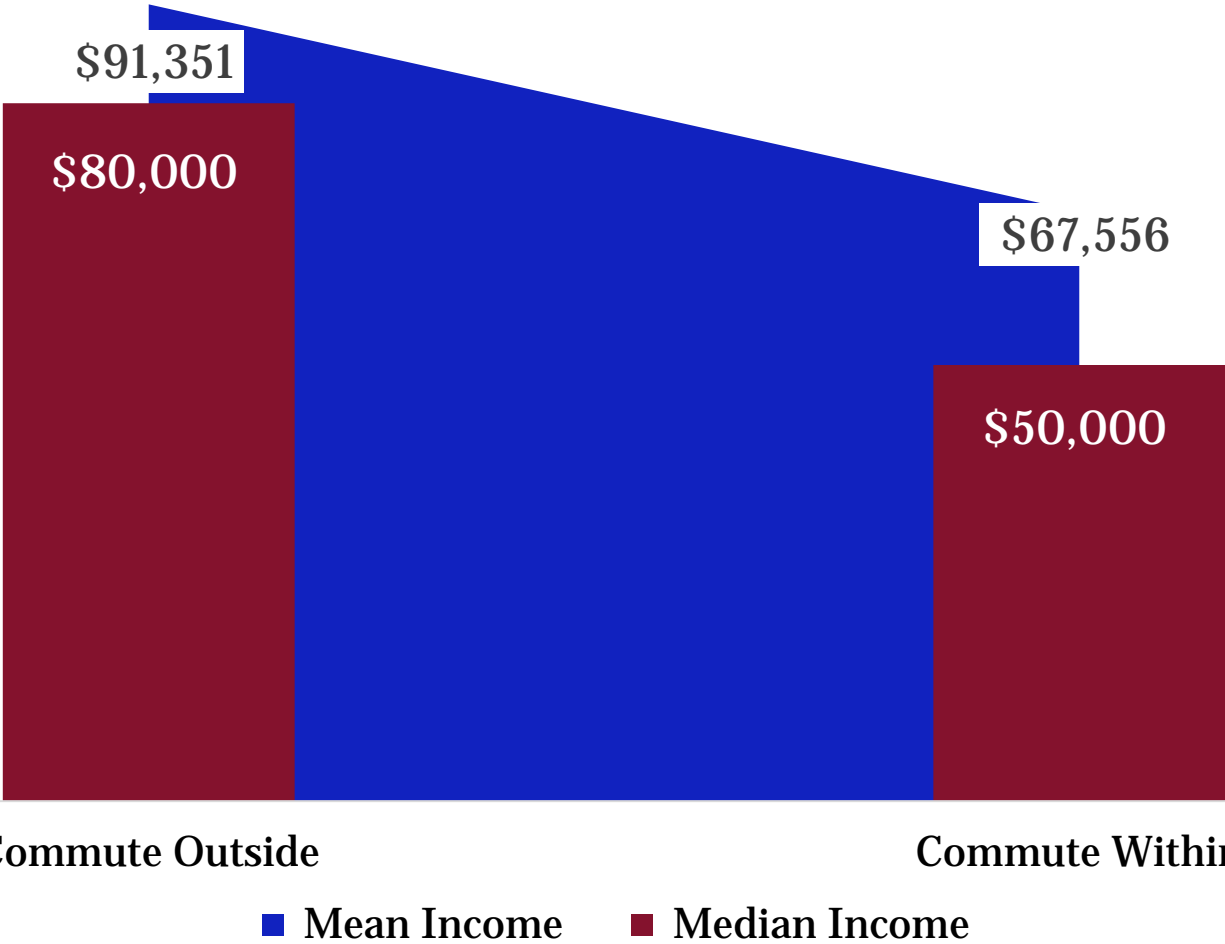
■ Self-Employed

Employment: by Industry

Fredericksburg Region Workforce

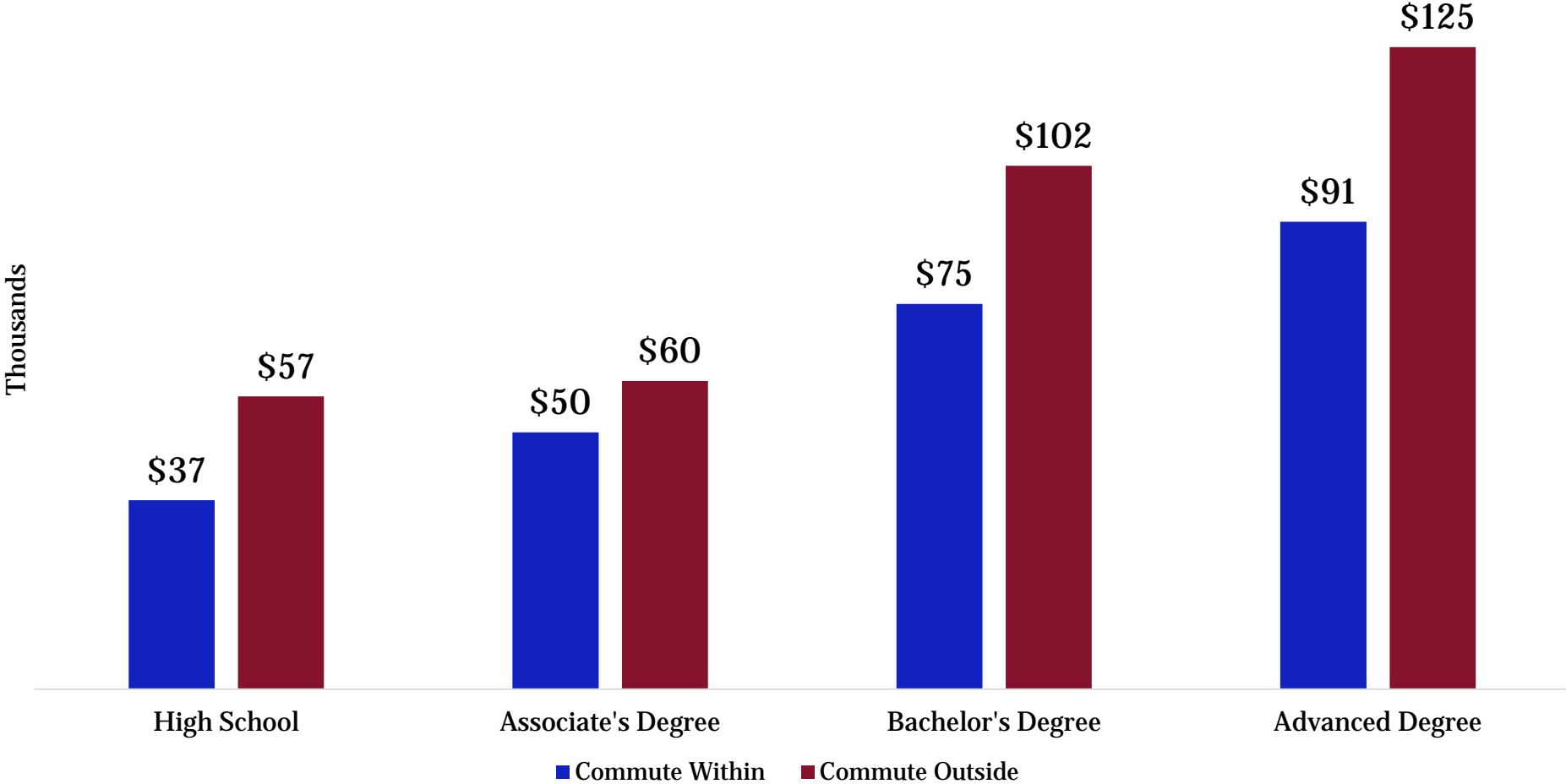


Income by Commute



Workers who commute outside the Fredericksburg Region earn a significant premium compared to the workers who live and work within the region.

2017 Median Income by Education and Commute



The salary premium holds for every level of education.

Summary of Findings

- 42.2% of the area's workforce commutes to work outside the region, up from 37% in 2013.
- 24.8% of our commuters spend at least two hours a day driving to and from work.
 - 10.3% spend at least three hours
- Our commuters are more likely to have higher levels of education and military experience than non-commuters.
- Our commuters have higher average incomes than non-commuters at every level of education.

Conclusions

- Our workforce is larger and more educated than it was in 2013
 - In fact, our work force is now more educated than the workforce of Virginia and America as a whole – an improvement from 2013
- A significantly greater percentage of our population is in the workforce compared to the national average.
- Nationally, the two fastest growing trends in commuting are super commuters and those who work from home.
 - Locally, we are seeing a growing percentage of our workforce commuting outside our region (42.2%), over 10% are super commuters, and over 5% work from home.
 - Policy makers should ensure infrastructure supports both traffic and telecommuting.