TOWN OF Herndon VIRGINIA

HOUSING STUDY FINAL REPORT

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TPMA

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EXECUTIVE SUMMARY

The Town of Herndon continues to experience growth in the highly competitive Northern Virginia housing market, resulting in increasing pressure on housing affordability, availability, and diversity of housing options. While Herndon remains comparatively affordable relative to the broader region, housing cost has outpaced income growth for many households. These conditions have contributed to rising rates of cost burden and severe cost burden, particularly among renter households, undermining housing stability and increasing displacement risk. Affordability challenges increasingly affect moderate-income households that are essential to the Town's workforce and economic vitality.

This Housing Plan advances the Town of Herndon's Comprehensive Plan by establishing a balanced, data-driven framework to guide housing policy, investment, and implementation. The Plan is designed to support economic competitiveness, community stability, and long-term sustainability by aligning housing goals with workforce needs, infrastructure capacity, and regional growth patterns. Central to the Plan is the preservation and reinvestment of Naturally Occurring Affordable Housing (NOAH), which provides a cost-effective means of maintaining affordability, reducing displacement risk, and stabilizing existing neighborhoods while complementing Herndon's need for new affordable housing developments.

Community engagement identified localized overcrowding in select areas of the Town, driven primarily by constrained housing choices and affordability pressures. In some locations, overcrowding has contributed to parking and infrastructure challenges. To address these conditions, the Plan promotes a diversified housing mix that includes missing-middle housing, multifamily development, and mixed-use communities. Expanding housing types, unit sizes, and configurations is critical to meeting the needs of households across income levels and life stages, reducing overcrowding risks, and supporting healthy living environments.

Herndon's development pipeline presents opportunities to modernize the housing stock and accommodate future growth. Absent intentional affordability strategies, market-rate development alone is unlikely to produce housing accessible to households earning at or near the Town's median income. The Housing Plan supports inclusionary zoning and incentive-based approaches to integrate affordable and workforce housing into new development while maintaining financial feasibility to ensure long-term affordability. The Plan reinforces transit-oriented development as a guiding growth strategy, concentrating mixed-income housing near transit to improve access to employment and services, reduce transportation costs, enhance walkability, and maximize the efficiency of existing infrastructure, while protecting established residential neighborhoods.

Strengthened intergovernmental coordination with Fairfax County is a critical component of successful implementation. Enhanced collaboration will allow the Town to leverage County technical expertise, administrative capacity, and housing program resources to expand housing options, preserve long-term affordability, and improve coordination of housing and human services. Peer municipal best practices within Fairfax County and the broader Northern Virginia region inform the Plan's policy framework to promote consistency, scalability, and effective implementation.

THE HOUSING PLAN

The Housing Plan is intended to function as a flexible, action-oriented framework supported by:

- Phased implementation,
- Measurable outcomes, and
- Ongoing monitoring.

Progressive housing development growth will require shared responsibility among Town leadership, residents, developers, employers, and regional partners. Through sustained community engagement, the Town of Herndon can continue to advance as an inclusive, economically resilient community that supports housing stability and opportunity for current and future generations.

INTRODUCTION

The Town of Herndon, incorporated in 1879 and the largest of Fairfax County's 3 towns, is home to just under 25,000 residents. At 4.2 square miles, Herndon has maintained its charm and affordability over the years, offering residents a blend of suburban comfort, the economic opportunity of the DMV, and small-town charm. The community's proximity to Dulles International Airport has been a longtime benefit, and transportation was made even more convenient when the Silver Line Metro Station was completed in 2022. This addition to the community has spurred multiple transit-oriented development plans and a boom in multifamily rental construction in the area. Herndon is also beginning the process of a full update to the Town's Comprehensive Plan, with the Housing Element a strong priority for both residents and Town leadership.



In response to these needs, the Town of Herndon has chosen to work with the Indianapolis-based consulting firm TPMA to conduct a housing study to provide analysis of Herndon's housing supply, market demand, affordability, and policy. With the support of Town staff, TPMA conducted a series of data collection methods through publicly and privately available databases, facilitated stakeholder engagement meetings and interviews, conducted a community-wide public survey, and reviewed policies and emerging trends to assess the current housing landscape in the Town of Herndon. The resulting report reviews Herndon's Housing Supply, Housing Affordability, and Housing Policy and Zoning, and outlines key findings and recommendations.

Throughout the research and engagement process, residents and leaders across the community expressed optimism about Herndon's future. Participants emphasized the importance of transparent communication and public education in building trust, enhancing understanding of housing goals, and fostering informed dialogue about future planning decisions.

By using existing tools, strengthening partnerships with Fairfax County, and adopting innovative yet context-sensitive approaches, the Town of Herndon can preserve what makes Herndon special while ensuring that ongoing development meets the needs of current and future generations. This housing study reflects that shared vision, one rooted in community pride, thoughtful planning, and inclusive opportunity.

KEY TERMS AND THEMES

Area Median Income – The midpoint of a specific area's income distribution, calculated annually by the Department of Housing and Urban Development (HUD).

- Very Low Income (0-50% AMI)
- Low Income (51-80% AMI)
- Medium Income (81%-120% AMI)
- Market Rate (121%+ AMI)

Affordable Housing – Affordable housing is housing that costs no more than 30% of a household's gross income, including rent (and associated fees) or mortgage, utilities, taxes, and insurance, without causing undue financial strain.

Cost Burdened Households – Households that spend more than 30% of their income on housing costs, including rent or mortgage.

Subsidized Housing – Housing that receives government assistance to reduce rent for low-income tenants.

Workforce Housing – Housing affordable to households earning between 60–120% of Area Median Income (AMI). These workers are generally not eligible for government subsidy but are priced out of market-rate housing.

Market Rate Housing – Housing based on the existing area market values and demand.

Naturally Occurring Affordable Housing (NOAH) – Housing that is affordable for households earning 80% or less of AMI without government subsidy or affordability efforts.

Dedicated Affordable Housing – Housing units that are intentionally created, preserved, or restricted to remain affordable to income-eligible households through public subsidies, regulatory agreements, or long-term agreements.

Deeply Affordable Housing – Housing is considered deeply affordable when it is affordable (less than 30% of household income) for residents at extremely low-income thresholds, often earning at or below 30% of the Area Median Income.

Accessory Dwelling Unit (ADU) – A smaller, independent residential dwelling unit located on the same lot as a stand-alone single-family home. Accessory dwelling units can be detached structures, attached as an addition to a single-family home, or internal to a single-family home or townhouse, as in the case of a walk-out basement that is a separate unit.

Affordable Dwelling Unit – An income-restricted residential unit reserved for income-qualified households, with rents or prices regulated to ensure long-term affordability.

Inclusionary Zoning – A land-use policy that requires or incentivizes developers to include income-restricted affordable housing units in new residential developments, typically by allowing increased density.

Missing Middle Housing – Housing typology usually consisting of duplexes, triplexes, or multifamily structures up to 8 units.

Low-Income Housing Tax Credit (LIHTC) – Federal program that incentivizes private investment in the development and preservation of income-restricted, rent-restricted affordable rental housing through dollar-for-dollar tax credits.

Housing Choice Vouchers – A federal rental assistance program that helps eligible low-income families, older adults, and individuals with disabilities access housing.

METHODOLOGY

Discovery

TPMA's research for this project began with a review of key documents and plans related to housing in the Town of Herndon, especially surrounding transit-oriented development, housing development, zoning policy, and other local and regional housing goals or priorities. These documents included, but are not limited to:

- Town of Herndon Comprehensive Plan
- Transit Related Growth Area (TRG) Small Area Plan
- Herndon Metrorail Station Area Plan and Transit-Oriented Core Plan (HTOC)
- Ordinances and Reports related to the Elden Street conversion and use
- Herndon Residential Pipeline Reports
- Fairfax County Affordable Development Unit Ordinance
- 2025 Town of Herndon Population & Housing Trends Report

Quantitative research included publicly available and proprietary data sources, including but not limited to:

- The American Community Survey
- Bureau of Labor Statistics
- US Housing and Urban Development
- Esri ArcGIS
- Lightcast
- Redfin
- Zillow
- Costar

Engagement

The Town of Herndon is known for its small-town charm, welcoming neighborhoods, and strong sense of community pride. To help shape a shared vision for the future, the Town partnered with TPMA, a consulting firm, to talk with residents, local leaders, and regional partners about housing in Herndon. These conversations helped the planning team to gain a deeper understanding of the community, its character, priorities, and hopes for how Herndon can continue to be a great place to live for everyone.

The engagement process began with interviews and discussions at the Herndon Fortnightly Library with community stakeholders, who were invited to contribute to shaping the plan by sharing their perspectives on the local housing market, barriers to affordability, and opportunities for future growth. Participants included local developers, school district representatives, Fairfax County housing staff, nonprofit leaders, among other local leaders and stakeholders. Interviews, conducted throughout the project, focused on local experts and policymakers, including Town councilmembers and planning commissioners, Fairfax County RHA leadership, County Supervisors, and representatives of active stakeholder groups in the area like Virginia New Majority.

These conversations were complemented with a public survey, which provided residents with an opportunity to express their views on housing conditions, housing and policy priorities, and the types development they believe are most needed in Herndon. Together, these efforts ensure that the plan reflects a wide range of perspectives and community voices.

Analysis

HOUSING DEMAND MODEL

TPMA developed a housing demand model to forecast demand for new for-sale and for-rent housing units over a 10-year period (2025-2035), broken down into five- and ten-year increments. The custom housing demand model built for this report anticipates demand based on two market segments: demand from new households (projected population change) and demand from existing households (housing turnover). Estimates of demand from these two segments of the population are combined to build the total potential demand for new housing in Herndon over the next ten years.

To predict demand from new households, data was collected on historic population growth from the US Census Bureau. This information is used to create time series analysis to build five-year population projections. To predict demand from existing households, or households moving from one unit to another within Herndon, the model looks at household projections and geographic mobility data.

It's important to note that this model assumes other factors remain constant and thus does not account for socioeconomic or political changes that may influence demand. To extrapolate to ten years, the growth rate over the first five years is assumed to remain constant over the next five years. Additionally, the percentage of individuals living in group quarters, the average household size, and the propensity to own or rent are assumed to remain constant.

AFFORDABILITY ANALYSIS

The Affordability Analysis is a tool for the comparison of the median cost of renting a 1- or 2-bedroom apartment in a particular geography with the average or median level of income for occupations and industries in the same location. This analysis essentially is a measure of which industries or occupations are, in general, living in cost-burdened housing conditions in a specified region.

This analysis contains data from two sources, the U.S. Census Bureau American Community Survey and Lightcast. Lightcast is a proprietary software that combines multiple datasets, such as those from the American Community Survey and Bureau of Labor Statistics, into a model that allows for granular representations of geographies down the census tract level.

In this report, the Affordability Analysis includes a group of occupations determined to be essential workers. In other words, a list of occupations which are ubiquitous and concerned with the support or safety of the general population. This group includes, but is not limited to, such occupations as Police Officers, Firefighters, and Childcare Workers.

The research team utilized the American Community Survey to acquire the median cost of a 1- and 2-bedroom apartment in the Town of Herndon and median annual earnings for essential occupations from Lightcast.

AN OVERVIEW OF HERNDON'S HOUSING SUPPLY

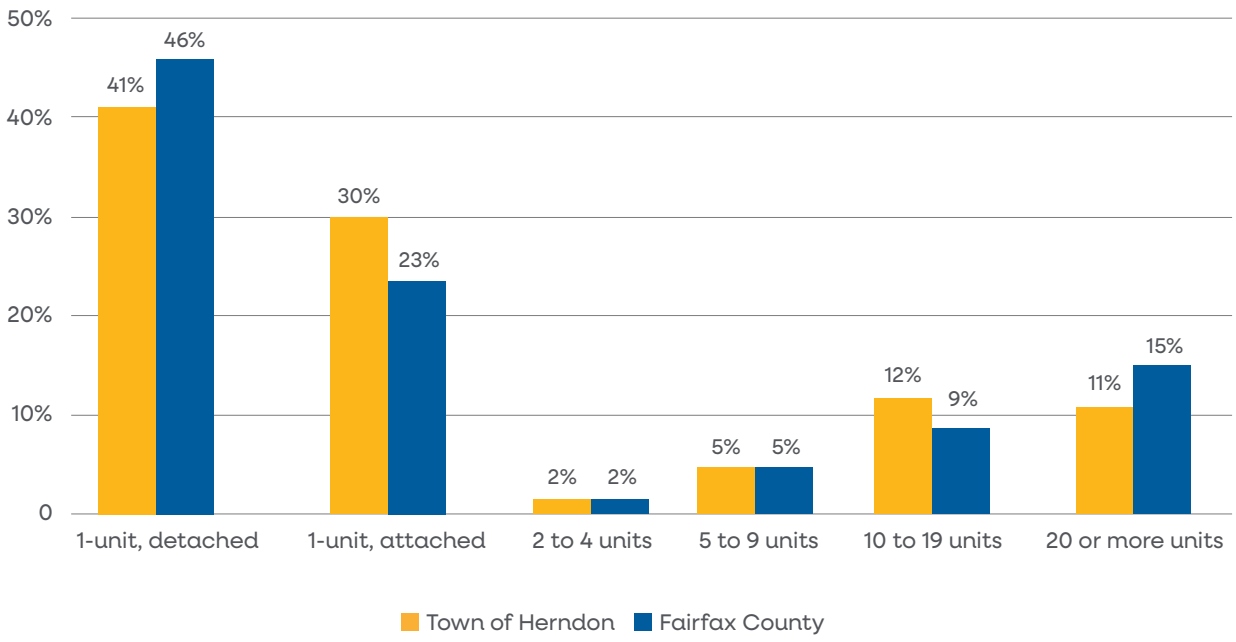
The Town of Herndon is currently experiencing a boom in the development of specific housing types, as a direct result of the Silver Line Metro stop. The following section analyzes the supply of housing types, planned and ongoing development, and projected demand for new housing. In addition to the overall supply of housing in the Town, several other factors work together to paint a complete picture of housing supply in Herndon, including diversity of housing types, age of housing stock, and real estate and development market trends.

CURRENT HOUSING MIX

In Herndon, 71% of housing structures are comprised of 1-unit, attached or detached structures. Higher-density structures, specifically those with 10+ units, comprise the next greatest portion in Herndon with 23% of structures. The middle, defined in this analysis as 2-9 units per structure, carries the remaining 7%.

Figure 1: Units in Structure; Herndon, Fairfax County

Source: U.S. Census Bureau American Community Survey; Table DP04 1- and 5-Year Estimates from 2023.



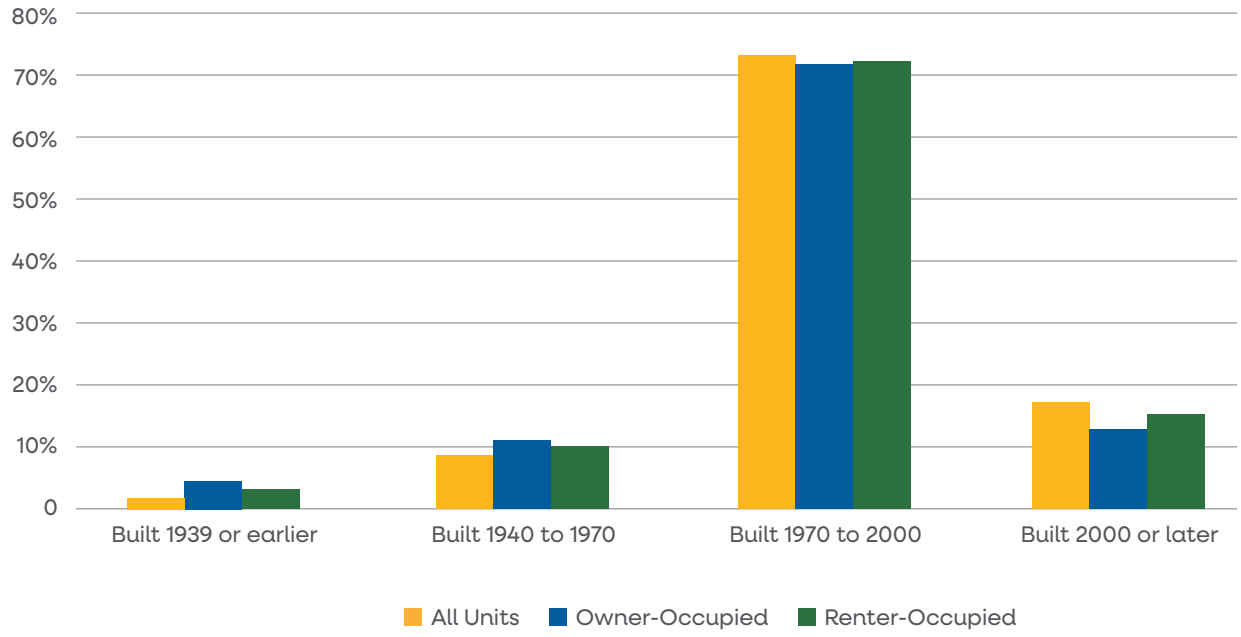
Aging Housing Stock

The vast majority of Herndon's housing stock, including both rental- and owner-occupied units, was built between 1970 and 2000. The Town's housing stock is older than both Fairfax County and Virginia overall. An aging housing stock can pose additional challenges to a community's housing ecosystem. Older homes have increased needs for major maintenance and repairs, renovations, and upgrades. They are generally less energy efficient and may contain hazardous materials no longer used in construction. The cost to keep up with the required maintenance and renovations can leave property owners struggling to maintain adequate living conditions, and deferred maintenance is a primary cause for vacant homes ultimately being abandoned or falling into disrepair.

However, communities with older homes on average also tend to be more affordable, Herndon being no exception. As will be discussed later in the report, nearly all of the rental developments in the town that qualify as "Naturally Occurring Affordable Housing" were built prior to 2000, primarily in the 1970s and 80s. As new construction continues, older homes naturally become the de facto "affordable housing" for many households.

Figure 2: Herndon Housing Stock by Year Built

Source: American Community Survey 2023 5-Year Estimates



AVAILABILITY METRICS

Vacancy Rates

Vacancy rates in Herndon are estimated at nearly zero for homeowners and 6.5% for rentals, representing a significant shift from 2018 and a moderately different landscape to Fairfax County as a whole. The Town's homeowner vacancy rate was estimated at 1.2% in 2018, while the rental vacancy rate was estimated at 0.8%. A combination of factors likely contributed to this change, including an increase in demand for Herndon's relatively inexpensive for-sale housing as compared to the greater region, and a shift in affordable rental opportunities in the surrounding area. This period did see a 4% decrease in the percentage of renter-occupied units, though multifamily rental was also constructed during the period just outside of town. The lag in data collection surrounding those developments' occupancy status also likely contributes to the increase in rental vacancy.

That being said, 6.5% vacancy should not be seen as overtly negative. Traditionally, the "ideal" vacancy rate for rental units should be between 4%-6%. As a number of studies have indicated, there is a clear relationship between vacancy rates and market rental prices. Simply put, when vacancy rates are in that ideal range, rents tend to remain steady, but too low and rents tend to rise more quickly. 6.5% is just over this ideal range, and suggests a generally healthy rental market.

Homeowner vacancy rates are not held to the same ideal range, simply because there is much lower expected turnover in the for-sale market. Still, nearly zero vacancies may suggest a supply shortage.

Table 1: Vacancy Rate by Tenure & Location, 2023

Source: American Community Survey 5-Year Estimates

	Town of Herndon	Fairfax County
Homeowner	<0.01%	0.4%
Rental	6.5%	4.1%

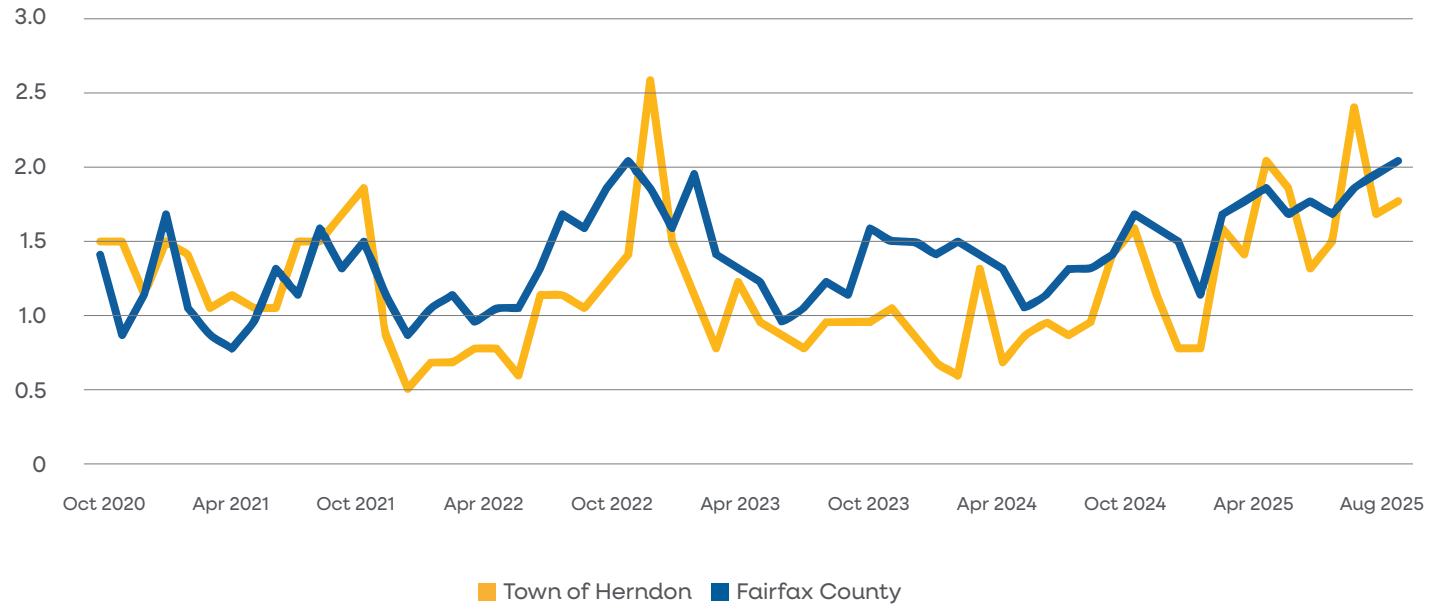
Months of Supply

Vacancy rates alone don't depict the full relationship between affordability and availability, especially for for-sale units. "Months of Supply" helps display this relationship in the home-buyer market, tracking the time it would take to sell a market's entire existing inventory at the current rate, assuming no additional inventory enters the market. A balanced market should have between 4 and 6 months of supply. A low value indicates a lack of supply in the market. Herndon's for-sale market has had less than 3 months of supply since February of 2018, with an average of 1.16 months of supply over a 5-year period from October 2020 to September 2025.

Like the extremely low homeowner vacancy rate, this suggests there is high demand in the for-sale market in the area, and a potential supply shortage as homes last little time on the market before sale. And similar to the relationship between vacancy rates and charged rent, a low months of supply statistic tends to correlate with rising sale prices. Rising sale prices in turn raise the entry point for the for-sale market, impacting not just first-time homebuyers but also established households looking to downsize and growing households who might want to move into homes that downsizers would otherwise be ready to leave (could they afford it).

Figure 3: Months of Supply, 10/2020 to 09/2025

Source: Redfin Real Estate Analytics



HOUSING GAP ANALYSIS

Housing Demand Projection

TPMA's housing demand model, as detailed in the methodology section of this report, forecasts demand for new for-sale and for-rent housing units over a 10-year period (2025-2035), broken down into five- and ten-year increments. The resulting estimates project additional demand for up to 2,459 housing units over the next ten years, driven primarily by increasing population growth in Herndon. This number only accounts for future growth and does not include existing unmet demand for affordable housing, or those who are currently cost burdened. Based on the existing tenure ratios, about 1,154 of these units would be for for-sale housing, with the remaining balance being for rental housing.

Table 2: 5- and 10- Year Housing Demand Projection

	For-Sale Demand	For-Rent Demand
5-Year Projection	556	629
10-Year Projection	1,154	1,305

Development Pipeline

As of the start of 2026, the Town of Herndon has more than 3,700 units reported in the residential development pipeline. The vast majority of these are multifamily units, focused in the HTOC and TRG, near the Metro. As of the publishing of this report, the projected delivery for these units ranges from 2027 to 2030.

These projections suggest that the existing development pipeline will more than satisfy the projected demand for rental housing, even accounting for potential non-delivery or changes in development outcomes in the interim. It is important to note that these figures should not be construed to suggest the existing pipeline will overproduce multifamily housing for the area, however. As discussed above, demand projections do not account for demand from outside the submarket, nor induced demand from outside forces. For these reasons, the demand projection should be read as a conservative estimate, rather than a limitation.

However, anticipated development is not necessarily expected to meet demand for new for-sale housing in the Town. While some development, both under construction and review, will include for-sale single family detached and attached housing, as well as medium-density units like townhomes and condos, development is still likely to fall short of the 5-year projected demand of 556 units.

Development of additional for-sale housing, especially single family detached housing, is made more difficult by land limitations in the Town. This environment makes preservation of existing housing all the more vital, as loss of functional housing will only further exacerbate any supply/demand mismatches.

KEY FINDINGS

- Current development is expected to meet and potentially even exceed the demand for multifamily and rental housing.
- For-sale housing, however, makes up a very small share of the development pipeline, and may fall short of projected demand.
- The overarching housing stock in Herndon is aging, leading to growing concern for older neighborhoods and properties and a need for targeted preservation and rehabilitation.

Recommendations and best practices surrounding these initial findings are explored in more detail in later sections. Addressing an aging housing stock, or mismatches in demand, requires additional context regarding the Town's relative affordability and policy landscape.

HOUSING AFFORDABILITY IN HERNDON

The Town of Herndon has traditionally been considered relatively affordable in the greater context of the DMV and Fairfax County. Data shows us that continues to be true, at least to an extent, but that Herndon is not immune to rising housing costs. Key to this analysis is ensuring the definition of affordable in this context is clear. Housing is considered affordable when a household spends no more than 30% of their gross income on housing costs. While the ways housing is made or kept affordable vary widely, the baseline threshold for what is affordable is relative to the household in question. Determining what is affordable for a community relies on Area Median Income data, which is, in part, the focus of the analysis that follows.

The following section analyzes how housing costs in Herndon compare to the greater Fairfax County, how costs have changed over time, how costs are impacting the workforce, and the intersection between what is affordable and what is available in Herndon.

HOUSING COST TRENDS

The ACS estimates median housing costs for the Town of Herndon at $2,266 ($2,434 for owners and $2,147 for renters). The majority of owners are spending $2,500 or more on housing costs, while renters are spending between $2,000 and $3,000. Still, it's important to recognize that incomes for renter-occupied households are considerably lower than for owners. Renter households earn a median income of $113,125, while owners earn a median income of $177,194. Despite median household income being 56% higher than renters, owners are not paying 56% higher housing costs. As is discussed later, this results in a much higher cost burden for renter-occupied households.

Table 3: Median Monthly Housing Costs by Tenure, 2018 to 2023

Source: American Community Survey 5-Year Estimate

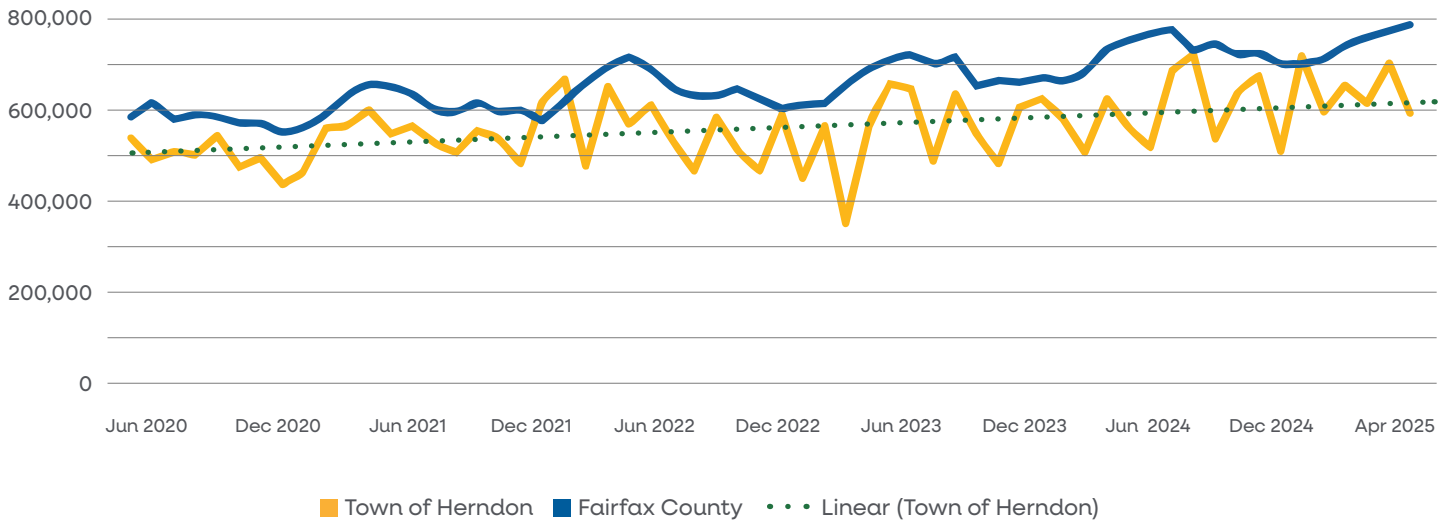
	All Households	Owner-Occupied	Renter-Occupied
2018	$1,1914	$2,067	0.4%
2023	$2,266	$2,434	4.1%
% Change in Median Housing Costs	18.4%	17.8%	18.9%
% Change in Median Household Income	25.3%	34.6%	27.7%

For Sale Housing

Since January of 2020, median monthly sale prices have gone up an average of 1.8% per month, though the Town of Herndon's median price fluctuates considerably from month to month. Median sale prices in Herndon are consistently lower than the county as whole, by an average of 19% from January 2020 – September 2025. Mortgage rates further complicate the issue, which peaked at the beginning of 2024 at nearly 7.8%, and continue to hover near 7% as of the summer of 2025.

Figure 4: Monthly Median Sale Price, 60 Month Period

Source: Redfin Real Estate Analytics

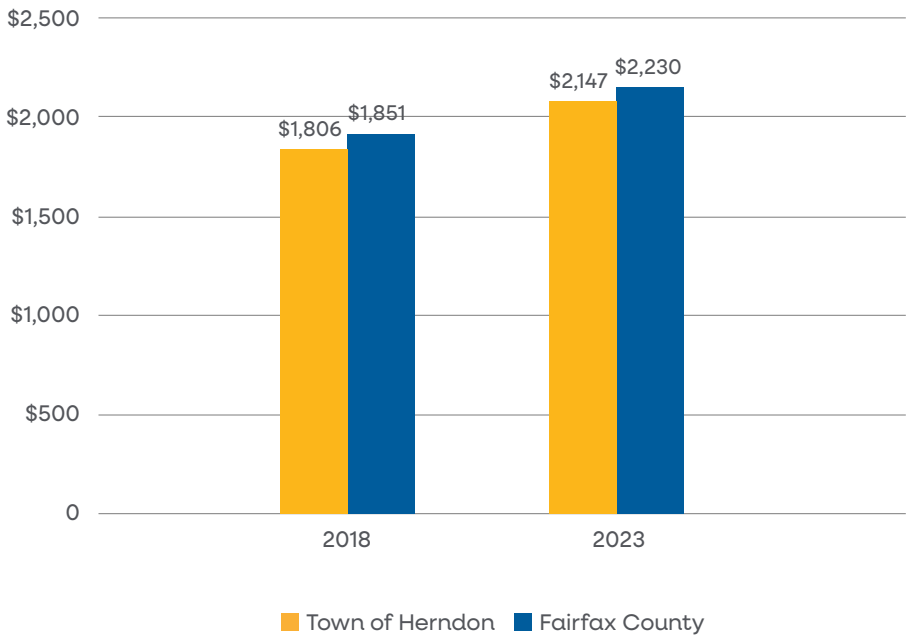


For Rent Housing

The American Community Survey estimates the median gross rent in Herndon in 2023 at $2,147, almost $200 lower than for Fairfax County as a whole. This represents a 19% increase in median rent since 2018, as compared to a 20% rise in the county. This suggests that the relative affordability of the town within Fairfax County has remained about the same over the 5 year period, though costs have risen dramatically during that time.

Figure 5: Town of Herndon Gross Rent, 2018 to 2023

Source: American Community Survey 5-Year Estimate



AFFORDABILITY ANALYSIS

Cost Burden

A consistent way to analyze and compare housing affordability is measured by "cost burden," a metric used by HUD to determine if housing is affordable. A household is considered "cost burdened" if they spend more than 30% of their household income on housing costs, which can include mortgage, rent, homeowners or renters' insurance, taxes, and utilities. Cost burdened households often have to make sacrifices in other basic necessities like food, clothing, transportation, childcare, or health care. In the Town of Herndon, 26.4% of all households are currently cost burdened, with renters more likely to be cost burdened than owners by about 6%.

Table 4: Cost Burden by Tenure, 2018 to 2023

Source: American Community Survey 5-Year Estimate

	2018	2023
All Households	31% (*n*=7,706)	26.4% (*n*=6,998)
Owner-Occupied	23.2% (*n*=4,543)	23.9% (*n*=4,081)
Renter-Occupied	42.6% (*n*=3,163)	30.0% (*n*=2,917)

A household is considered severely cost burdened if they are spending more than 50% of household income on housing costs. Like the incidence of cost-burden as a whole, renters are more likely to be severely cost burdened than homeowners. Severely cost burdened households are the most at risk of losing their housing, and the incidence of severe cost burden can be a warning indicator that households are in danger of becoming unhoused. Severe cost burden decreased between 2018 and 2023, most significantly among renters.

Table 5: Severe Cost Burdened by Tenure, 2018 to 2023

Source: American Community Survey 5-Year Estimate

	2018	2023
All Households	13.2% (*n*=7,706)	12% (*n*=6,998)
Owner-Occupied	7.4% (*n*=4,543)	10.5% (*n*=4,081)
Renter-Occupied	21.5% (*n*=3,163)	14.0% (*n*=2,917)

Overcrowding

The Census Bureau defines a housing unit as being overcrowded when there is more than one person living in the unit per room (excluding bathrooms). In 2023, the ACS estimated that 6.5% of all occupied units in Herndon, or 504 households, were overcrowded. This is nearly double the rate of Fairfax County. Renter-occupied units in particular are overcrowded, making up over 80% (427) of the overcrowded units in the town. While overcrowding in Herndon has gone down for owner-occupied units since 2018, the problem has worsened for renters. Overcrowding is a key indicator of a lack of affordability in the housing market. Families that are unable to afford rents in an area are more likely to double up to share costs, but this can cause added strain on local utilities and infrastructure.

Determining where overcrowding is most prevalent and identifying source causes can help the town better treat the issue. While some households may be "overcrowded" by choice, such as multi-generational households that prefer to live together, others may be overcrowded due to financial constraints that lead them to rent out individual rooms to afford rent. Especially when there are children involved, these situations can pose a danger not just to parking and utilities, but to the overall wellbeing and safety of those in the home. Regardless, if housing isn't affordable to a family, the only alternative is often eviction.

Table 6: Overcrowding by Tenure, 2018 to 2023

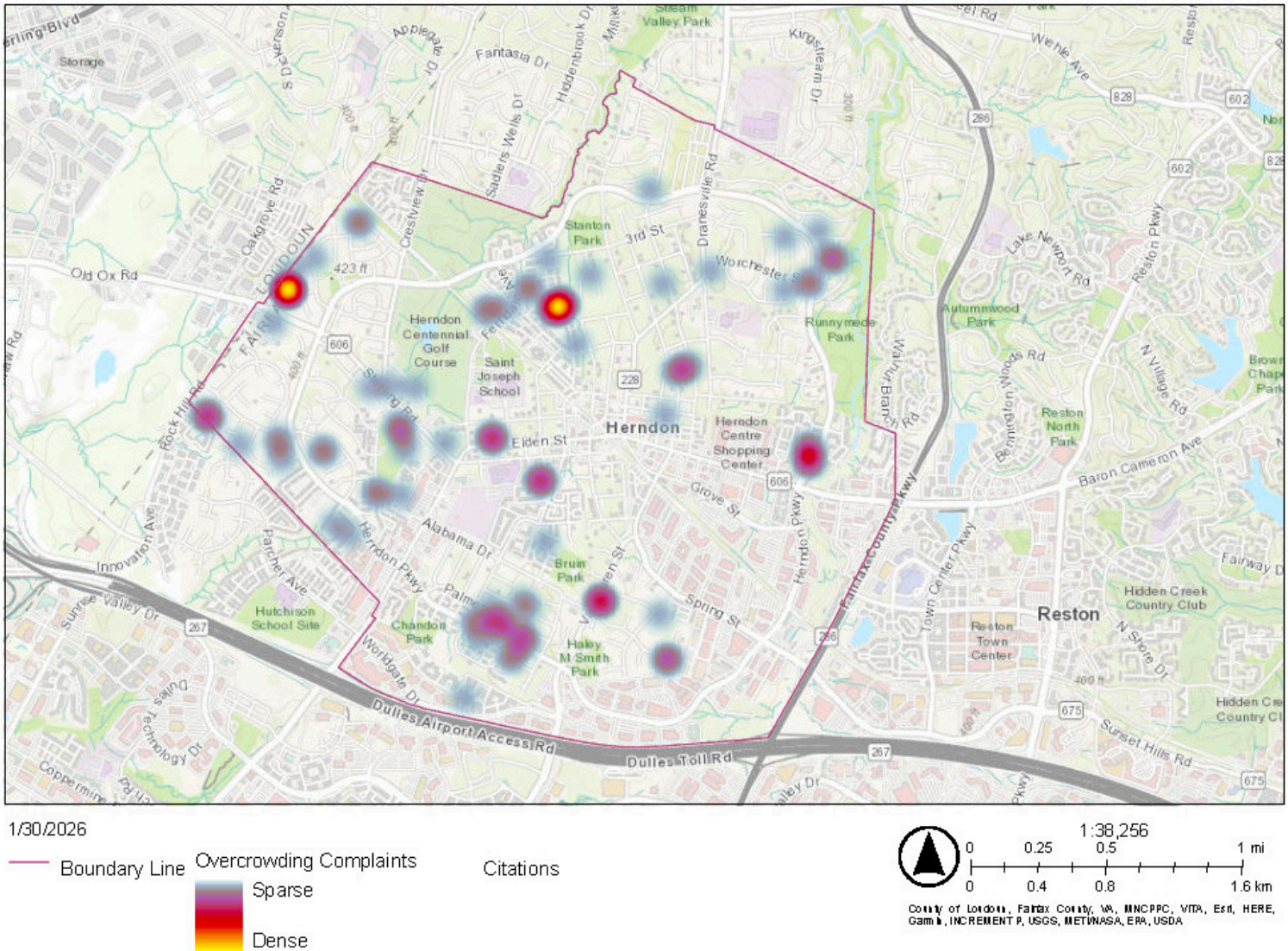
Source: American Community Survey 5-Year Estimate

	Town of Herndon		Fairfax County	
	2018	2023	2018	2023
All Households	6.96%	6.45%	3.36%	3.13%
Owner-Occupied	3.07%	1.57%	1.10%	1.07%
Renter-Occupied	12.52%	14.64%	8.17%	7.57%

Overcrowding has been a frequent concern of residents of the Town, and was a common topic brought up by stakeholders throughout this project. However, there isn't widespread consensus on how pervasive the problem truly is in Herndon, or if the Town's leadership should make any policy or strategic changes to address the issue. When asked in the public survey whether they would support zoning or policy changes to allow more unrelated people to live together, 39.6 percent were supportive or strongly supportive, 38.6 percent were opposed or strongly opposed, and 21.8 percent were undecided. The following figure displays a heat map of the origin of complaints related to overcrowding from the last 5 years. While not a perfect quantitative proxy, this does help identify where in the Town overcrowding is having the largest impact on residents, and where targeted efforts to address the issue would be most effective.

Overcrowding is not an issue across every Herndon neighborhood, an important fact to remember when considering where and how to develop and incentivize the construction of new housing. This was a central part of many conversations surrounding overcrowding throughout the project, as some stakeholders were concerned that an overemphasis on overcrowding may leave decision makers to hesitate when considering opportunities like repurposing a disused parking lot into housing units, or employing incentives like parking requirement reductions, when overcrowding can strain parking limitations. While overcrowding should be considered in these circumstances, it is essential to take into account the geographic context.

Overcrowding Complaints (Last 5 years)



Workforce Affordability

Stakeholders emphasized the importance of preserving Herndon's unique character while developing thoughtful, inclusive housing solutions for residents at every income level and stage of life, acknowledging that the region's housing supply and costs have made it increasingly difficult for many to live in the community. Teachers, public employees, and young families often struggle to afford housing near their workplaces, while long-term residents feel like the housing supply is adequately meeting the needs of the town and the residents.

This situation is exemplified when we look at the landscape for those working jobs in the community often referred to as "essential occupations". Though there are high-earners in this list, such as physicians and registered nurses, who earn over $238k and $103k per year, respectively, the remainder of these occupations, such as Social Workers, Teachers, First Responders, and childcare Workers, earn between $64.6k and $80.2k per year in Median Annual Earnings, with Childcare Workers only earning $33.8k per year.

According to this analysis, Emergency Medical Technicians and Childcare Workers are cost-burdened at the level of a 1-bedroom apartment in the Town of Herndon. Emergency Medical Technicians use approximately 32% of their monthly income for a 1-bedroom apartment, while Childcare Workers allocate approximately double that, at 61%. Considering the median cost of rent for a 2-bedroom apartment, almost all Essential Occupations would be considered cost-burdened with the exception of Physicians and Registered Nurses. Social Workers, Secondary School Teachers, Police Officers, Elementary and Middle School Teachers, Firefighters, Emergency Medical Technicians and Childcare Workers must allocate between 32% - 76% of their monthly income to pay for a median 2-bedroom apartment.

Table 7: Rental Affordability for Essential Workers, Town of Herndon[1]

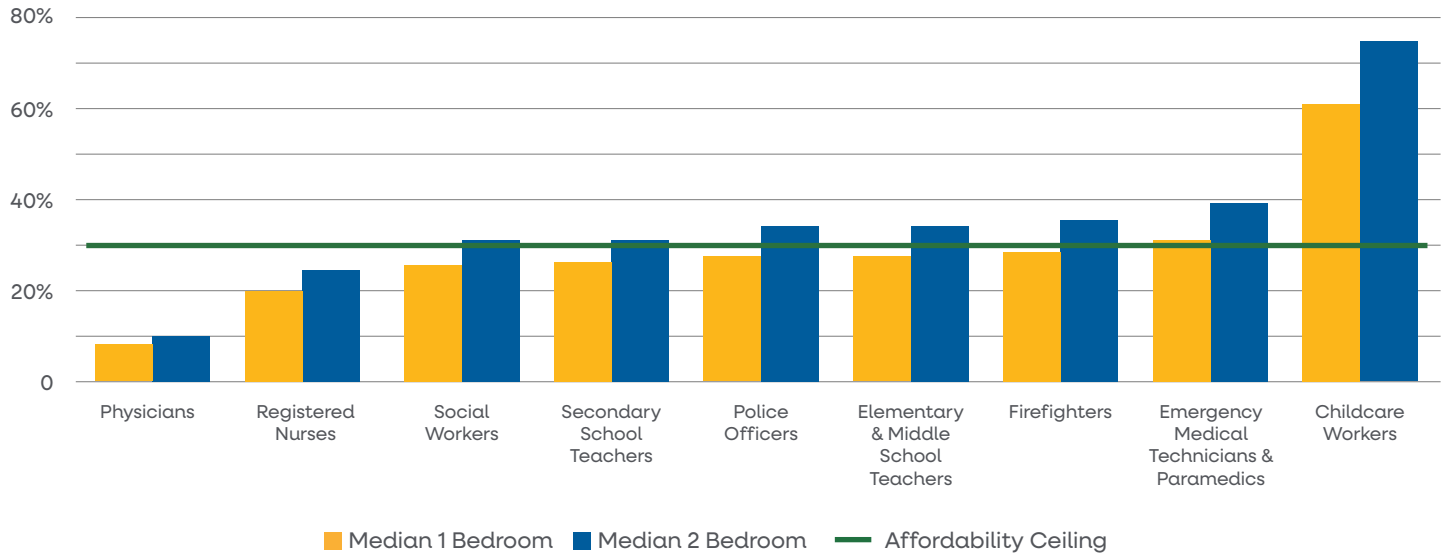
Source: Lightcast and American Community Survey 5-Year Estimates

Occupation	2024 Median Annual Earnings	Housing Affordability Ceiling	% Monthly Income Median 1-bedroom	% Monthly Income Median 2-bedroom
Physicians	$238,201.39	$5,955.03	9%	11%
Registered Nurses	$104,171.58	$2,604.29	20%	25%
Social Workers	$80,292.13	$2,007.30	26%	32%
Secondary School Teachers	$79,893.72	$1,997.34	26%	32%
Police Officers	$76,882.06	$1,922.05	27%	33%
Elementary and Middle School Teachers	$75,210.76	$1,880.27	27%	34%
Firefighters	$73,753.26	$1,843.83	28%	35%
Emergency Medical Technicians & Paramedics	$64,570.14	$1,614.25	32%	40%
Childcare Workers	$33,831.78	$845.79	61%	76%

Seen graphically, the following chart demonstrates the pressure the 30% affordability ceiling has on the income of Essential Occupations. Although a 1-bedroom apartment at the median amount of rent is near the cost-burdened threshold for many of these occupations, affording a 2-bedroom apartment pushes past this threshold for 7 out of these 9 professions. For Essential Occupations, there is less leeway than in the case of Most Top Occupations to avoid being cost-burdened should income become constrained or rent prices increase.

[1] Lightcast: Median Annual Earnings by Zip Code. Housing Affordability Ceiling calculated by using data from U.S. Census Bureau American Community Survey; Table B25031 5-Year Estimates from 2023

Figure 6: Percent of Median Monthly Earnings for Median 1- and 2-Bedroom Rent, Town of Herndon, Essential Occupations



United for ALICE, an affordability project from the United Way, provides further context to understand what affordability challenges families face. ALICE stands for "asset limited, income constrained, employed" and, according to the United for ALICE website, "represents the growing number of families who are unable to afford the basics of housing, child care, food, transportation, health care, and technology".[2] What is important to understand is that the heads of ALICE households are employed and above the federal poverty line, yet are still finding it difficult to afford life's necessities and are often forced to make difficult decisions about how to allocate their earnings in their homes.

The following table provides a breakdown of the typical costs associated with what United for ALICE term a "Housing Survival Budget". Where possible, these costs are regionally specific and are calculated based on available local data. The data presented here is for Fairfax County, 2023:

[2] United for ALICE. https://www.unitedforalice.org/introducing-ALICE/virginia

Table 8: Household Survival Budget, Fairfax County, 2023[3]

Source: United for ALICE

Monthly Costs	Single Adult	One Adult, One Child	One Adult, One in Child Care	Two Adults	Two Adults, Two in Child Care	Single Adult 65+	Two Adults 65+
Housing	$2,232	$2,272	$2,272	$2,272	$2,272	$2,232	$2,272
Child Care	$0	$484	$1,292	$0	$1,292	$0	$0
Food	$600	$1,015	$910	$1,100	$910	$552	$1,012
Transportation	$166	$332	$166	$332	$166	$166	$332
Health Care	$199	$439	$439	$439	$439	$544	$1,087
Technology	$86	$86	$86	$116	$86	$86	$116
Miscellaneous	$328	$463	$517	$426	$517	$358	$482
Taxes	$696	$773	$923	$769	$923	$779	$1,167
Monthly Total	$4,307	$5,864	$6,605	$5,454	$6,605	$4,717	$6,468
Annual Total	**$51,684**	**$70,368**	**$79,260**	**$65,448**	**$79,260**	**$56,604**	**$77,616**
Hourly Wage	$25.84	$35.18	$39.63	$32.72	$39.63	$28.30	$38.81

For a single adult in the Town of Herndon, most of the essential occupations except for Child Care workers earn above the limit of the survival budget ($51,684 per year in Fairfax County). As soon as one child that requires daycare is introduced, this list now includes Emergency Medical Technicians and Paramedics, Teachers, Firefighters, and Police Officers. Due to the demanding schedules of these professions, if there is a child in the home, outside childcare is a likely necessity. This data from United for ALICE, taken in combination with previous figures on the age distribution of the Town of Herndon, shows that starting a family and living in Herndon is financially strenuous for many of these Essential Occupations.

[3] The State of ALICE in Virginia. United for ALICE. https://www.unitedforalice.org/county-reports/virginia#10/38.8376/-77.2874

AFFORDABLE HOUSING SUPPLY

While the previous section focused on affordability in the general sense and across a range of incomes, it's also important to specifically review the availability of affordable housing in the more traditional sense. That is, housing that is affordable specifically to households making less than 80% of area median income. These developments are categorized as either "naturally occurring" or "dedicated" affordable housing.

Naturally Occurring Affordable Housing

Naturally Occurring Affordable Housing (NOAH), for the purposes of this report, include housing units that are affordable for a household in Herndon earning 80% or less of Area Median Income without government subsidy or affordability efforts. These properties are priced below market rate. According to the American Community Survey, 80% of area median income in the Town of Herndon is approximately $113,000, meaning the monthly affordability threshold would be approximately $2,800. The following table depicts the primary multifamily developments in Herndon, including the number and type of units in the development, and starting rents. Of these, all but one would qualify as NOAH for the town. This is promising data for the area but should be taken in greater context.

The share of NOAH developments is likely to shift in the coming years as housing in the TRG and HTOC enter the market. Projections currently suggest that these developments' rents will be well above the NOAH threshold. While this is normal for new builds, it is worth considering the intent behind transit-oriented development and housing. Developing in transit-focused areas is often intended to help support those most reliant on public transit. If that housing is not affordable for the target demographic, there may be a risk of high vacancy. At a minimum, it is worth considering if the housing being developed in this area is going to meet the needs of target demographics.

Table 9: Starting Rates for Multifamily Housing in Herndon, 2025

	Built	Units	Type	Rates
Stuart Woods Apartments	1975 (2006)	450 units	1-2 beds	$2,108 (1 bed)
Park Avenue Apartments	1964	44 units	2 beds	$1,618 (2 bed)
Dulles Glen Apartments	1972	180 units	1-4 beds	$1,562 (1 bed)
Westerly at Worldgate	1995 (2000)	320 units	1-3 beds	$1,968 (1 bed)
Parkridge Garden Apartments	1974 (1989)	144 units	1-3 beds	$1,891(1 bed)
Berkdale Apartments	1972	184 units	1-3 beds	$1,774(1 bed)
Trellis Herndon Apartments	2024	168 units	Studio-2 beds	$2,145 (1 bed)
International Apartments	1962	90 units	1-3 beds	$1,795 (1 bed)
Towns at Herndon (Townhome Apartments)	2002	216 units	2-3 beds	$2,871 (2 bed)
Worldgate Condominiums	1993	508 units	1-3 beds	n/a
Herndon Harbor House*	2001	120 units	1 bed	$1,116 (1 bed)

Dedicated Affordable Housing

There are currently a very limited number of dedicated affordable housing in the Town of Herndon, and each was financed and is maintained through different methods. The following gives a brief description of each of these, including Ovation at Arrowbrook, which while not technically within the town limits, serves the same submarket and functions here as a great example of how creative capital stacking and mixed-use design can serve the community.

HERNDON HARBOR HOUSE

Herndon Harbor House is an income-restricted senior living LIHTC property put into service in Herndon in 1999 and expanded in 2003. Herndon Harbor is the only LIHTC property currently active within the town limits, and is managed by Fairfax County. The 120 unit senior community includes one-bedroom apartments as well as wraparound services and programming.

TRELLIS APARTMENTS

Stakeholders encouraged maximizing existing opportunities for affordable housing development. The Trellis Herndon Apartments highlights a perfect local example of adaptive reuse. The project adapted a former Residence Inn into 168 apartment units. The redevelopment received approval from Herndon Town Council in 2022 and opened in 2024. Part of the project included a dedicated workforce component (80 percent AMI), with the town functioning as the oversight body. This project demonstrates how creative redevelopment strategies can expand housing options while blending seamlessly into the Town's existing landscape.



BERKDALE APARTMENTS

Berkdale Apartments is primarily considered naturally occurring affordable housing but does have a small number of units set aside as income restricted dedicated affordable housing. The 184 garden-style apartments are located near Elden Street with easy access to bus transit, and was acquired by Jair Lynch to support an attainable housing strategy in the community.

OVATION AT ARROWBROOK*

Ovation at Arrowbrook is a transit-oriented, mixed-use development just outside of Herndon and less than a mile from the Innovation Metro Station. The development includes 274 dedicated affordable apartments. The project was launched in 2021 and included significant financial support from the county through Housing Blueprint funding, project-based vouchers, and revenue bonds. All apartments in the development are dedicated affordable housing for households earning between 30 and 60 percent of AMI.

LIHTC PROPERTIES IN THE HERNDON AREA

This table displays the LIHTC properties in the Herndon area, including all developments with a Herndon address. All but Herndon Harbor House I and II are located outside of town limits.

Table 10: LIHTC Properties in Herndon Area

Source: Novogradac

Property	Year PIS	Affordable Units	Rates
Dulles Center 2410 Little Current Dr	1996/1997	144/128	60% AMI
Jefferson Commons 2452 Masons Ferry Dr	1998	136	n/a
Herndon Harbor House I* 873 Grace St	1999	60	50% AMI
Kendrick Court 13430 Coppermine Rd	2000	139	60% AMI
Herndon Harbor House II* 873 Grace St	2003	60	60% AMI
Coppermine Run 2450 Masons Ferry Dr	2003	152	60% AMI
Coppermine Place 13395 Coppermine Rd	2006	66	50% AMI

KEY FINDINGS AND RECOMMENDATIONS

- While Herndon is an affordable community in the context of Fairfax County and Northern Virginia as a whole, some essential parts of the workforce still fall short.
- Herndon has a significant amount of rental Naturally Occurring Affordable Housing within Town limits, but these developments are nearly all aging properties built in the 1960s, 70s and 80s.
- New development will work to decrease the average age of rental units in the Town, but is not expected to be affordable for the median Herndon household without dedicated affordable units.
- Overcrowding is a concern among stakeholders, though it seems to be concentrated in a small number of areas, where work to address the challenge should be targeted.

Recommendations

- Explore funding resources and incentive programs to preserve the remaining stock of existing affordable housing.
- Incentivize affordable housing development while utilizing the expertise of Fairfax County to develop workforce housing within multi-use developments.
- Prioritize preservation and reinvestment of existing NOAH properties to maintain long-term affordability.

BEST PRACTICES

AFFORDABLE HOUSING PRESERVATION

Local Housing Solutions has published a useful case study on a small- to- medium sized city's effort to preserve affordable housing. This case study examines a suburban community that dedicated funding to preserve its stock of privately owned affordable rental properties, commonly referred to as naturally occurring affordable housing (NOAH). Deferred maintenance backlogs in NOAH rental properties prompted the City of Brooklyn Park, Minnesota, to establish the Brooklyn Park NOAH Preservation Program in 2017.

ADDITIONAL INSIGHTS

Helpful insights can also be gleaned from the U.S. Department of Housing and Urban Development's (HUD) brief on strategies to combat displacement by ensuring renter protection and fair housing practices. Additionally, the Center for American Progress offers a series of case studies on ways to mitigate gentrification and the lack of affordable housing. Finally, Shelterforce magazine has published an article on an innovative anti-displacement tool recently developed in Louisville to measure the potential for adverse impacts associated with public investment in housing.

HOUSING POLICY AND ZONING

The final focus area of this report revolves around the primary tools the Town of Herndon has to address housing across the community. In many ways, this section brings together the key findings of the first two within the greater policy context of the Town. This section focuses on a couple of key policy areas that rose as both the focus of stakeholders and the most prevalent opportunities for housing growth and development in the community. These include Herndon's relationship with the County and opportunities for more effective partnership, transit-oriented development and key opportunities for development, and potential adjustments to the town's accessory dwelling unit policy.

FAIRFAX COUNTY COLLABORATION

Development Guidance and Support

A key opportunity identified through engagement was deepening collaboration with the Fairfax County Redevelopment and Housing Authority (FCRHA). The Town of Herndon residents currently have access to all FCRHA programs, and closer coordination could help the Town of Herndon identify suitable sites, attract investment, and expand affordable housing opportunities. The FCRHA offers valuable technical assistance, financing tools, and development partnerships that complement Herndon's local goals. The last FCRHA supported affordable housing development within the Town of Herndon was completed in 2001. Strengthening this partnership would allow the Town of Herndon to leverage Fairfax County's expertise to expand the affordable housing portfolio.

Strengthening coordination between the Town of Herndon and Fairfax County is essential to advancing housing affordability and economic stability. Fairfax County has demonstrated a clear willingness to support the Town through public- and private-sector partnerships, technical mentorship, and alignment with the County's Communitywide Housing Strategic Plan, which establishes a goal of producing at least 10,000 new affordable housing units by 2034 while ensuring no net loss of existing market-affordable housing.

The Fairfax County Redevelopment and Housing Authority (FCRHA) already provides countywide services within the Town of Herndon, including administration of the Housing Choice Voucher (HCV) program and participation in affordable housing development efforts. Leveraging this existing infrastructure presents an opportunity to expand capacity, streamline implementation, and reduce the Town's administrative burden.

When the CDBG and HOME funds that support housing rehabilitation are aligned with state-administered programs through the Virginia Department of Housing and Community Development and complementary tools offered by Virginia Housing, these resources function as a coordinated framework to strengthen the Town's ability to preserve housing quality and long-term affordability. This integrated approach is increasingly critical in the current economic climate, marked by recent federal employment losses, rising numbers of homes entering the market, and heightened risk of housing displacement.

The Town of Herndon is a subrecipient of CDBG funds awarded to Fairfax County. Annual funds are in the amount of $80-$90k per year which is used to partially fund one full time position, while the remainder of the grant is used directly on eligible repairs to owner-occupied properties where household income is below 80 percent AMI. This is an important tool for preserving NOAH and should be continued or expanded.

At the same time, a limited supply of affordable housing across a range of income levels continues to present challenges for business attraction and workforce retention. By deepening its partnership with Fairfax County, the Town of Herndon can advance a more diverse and resilient housing portfolio that supports households at varying income levels, strengthens the local economy, and positions the Town to respond effectively to evolving housing needs.

Inclusionary Zoning (Affordable Dwelling Unit Ordinance)

Inclusionary Housing is an umbrella term for policies that help low- and middle-income households afford new homes built, both for sale and for rent. Most commonly, inclusionary zoning refers to ordinances that either require or encourage developers to include a certain share of units in a development to be set aside as dedicated affordable units, or below market-rate. In exchange, inclusionary zoning policies include incentives to reduce overall cost, most often density bonuses.

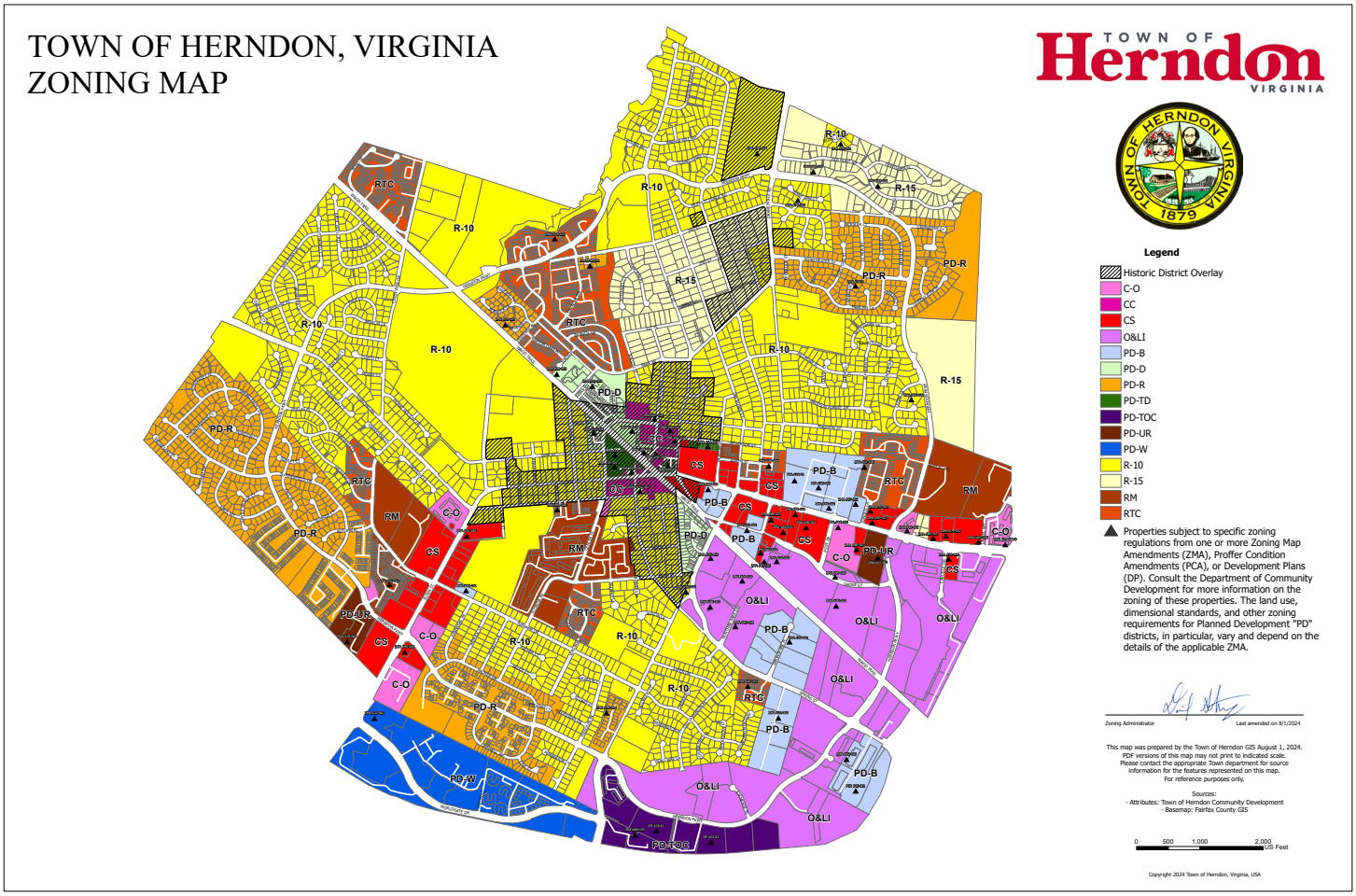
Note that in Virginia inclusionary zoning laws are often called Affordable Dwelling Unit (ADU) ordinances, and the housing units created in accordance with these laws are called ADUs. These are not to be confused with Accessory Dwelling Units, also known as ADUs.

Fairfax County has a long history with inclusionary zoning, its current policy in place since 1990. While inclusionary zoning is not allowed for most localities in the Commonwealth, a 1989 statute explicitly allows for the ordinance in six localities: the counties of Albemarle, Arlington, Fairfax, and Loudoun, and the cities of Alexandria and Fairfax. Later legislation allowed for "voluntary inclusionary zoning" for all other localities, allowable only when a developer applies for a rezoning or SUP. The law also requires imposing an affordability term of 15-50 years, and a sliding scale involving the required set aside to density bonus ratio. These provisions are often seen as overly complex or burdensome to consistently implement, though adjustments made in 2020 have simplified the process somewhat.

This effectively puts towns like Herndon in an uncertain position, unable to pass inclusionary zoning policies independently, but potentially able to sign on to Fairfax County's existing ordinance.

The Town of Leesburg in Loudoun County was able to do just this. Article 3 Sec. 3.17 of the town's zoning ordinance establishes the Affordable Dwelling Unit Development program in the Town, instituting the county's inclusionary zoning policy via a Memorandum of Agreement (MOA) approved by the Town Council and the Loudoun County Board of Supervisors.

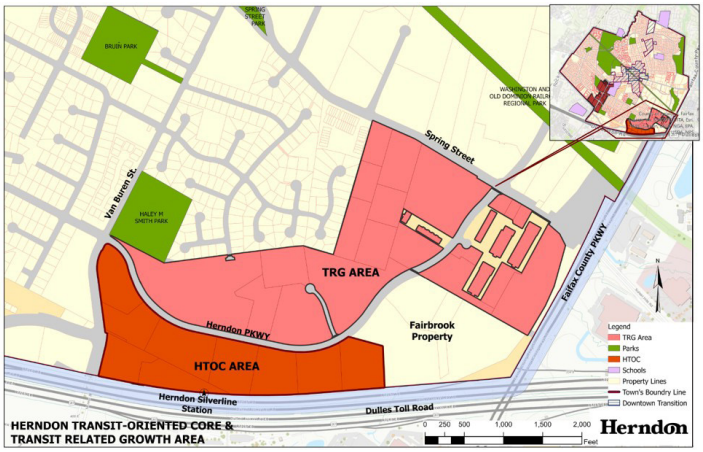
LAND USE AND ZONING



Transit-Oriented Development

The Town of Herndon's long-term vision prioritizes people by balancing growth with preservation, supporting innovation, and maintaining the small-town character that defines the community. The redevelopment of the Transit-Related Growth (TRG) adjacent to the Herndon Transit-Oriented Core (HTOC) is a strategic implementation of this vision and advances both the Town's Comprehensive Plan and regional transit-oriented development objectives for Northern Virginia. Concentrating growth near transit allows the Town to accommodate future housing and economic needs while minimizing impacts on established neighborhoods.

Transit-oriented development enables housing to be located closer to employment centers, schools, childcare, retail, and community services, reducing transportation costs and improving mobility and safety. Within the growth area, the Town's land-use framework supports mixed-income development, integrating affordable and workforce housing alongside market-rate units. This approach promotes socioeconomic diversity, supports the local workforce, and reduces displacement pressures by expanding housing options in high-opportunity areas.



Housing design standards play a significant role in ensuring that redevelopment is compatible with Herndon's scale and character. Community-driven, main-street-oriented design guidelines emphasize walkability, human-scale buildings, and high-quality public spaces, helping new development function as a seamless extension of the existing community. Complementary investments in multimodal infrastructure, including pedestrian safety improvements, bicycle facilities, and transit access, further reinforce a connected and accessible neighborhood environment.

While the current transit-oriented development strategy has focused on growing the housing stock near the Silver Line Metro stop, there are other locations to be considered to ensure easy access to transit across town. The local bus system is also an essential transportation service in the region, and aligning development with this system, especially along Elden Street, extends connectivity to a larger demographic.

Collectively, these strategies provide a clear framework for accommodating growth while strengthening community cohesion. By aligning transit-oriented development, affordable and workforce housing policies, and form-based design standards, the Town is advancing housing opportunity and economic vitality in a manner that preserves neighborhood character, supports local businesses, and upholds the small-town identity that residents value, the blending of suburban and urban quality of life.

Addressing Future Development Needs

As discussed earlier in the report, the current development pipeline for the Town of Herndon is almost entirely made up of multifamily rental housing. When paired with the projected demand model, this suggests a potential lack of for-sale development. While Herndon's existing housing stock has a majority of for-sale housing, there may be a mismatch in supply and demand in future years. Addressing this mismatch means identifying housing types and available land that would lend opportunities to meeting this demand.

One way to address the need, while staying consistent with the Town's stated goals and strategic direction, would be to leverage the TRG Small Area Plan. Allowing for medium density town houses and cottage court developments both creates additional opportunities for for-sale housing, and meets affordability needs and "missing middle" housing. While the TRG currently calls for for-sale housing in specific areas, it may benefit the town to expand that area, or allow for moderately lower density developments to attract for-sale developments.

Additional options in the area to consider include neighborhoods in danger of a kind of redevelopment, discussed earlier in the report, that replaces older homes with larger and more expensive properties and ultimately prices out residents. A key example includes the neighborhood of Chandon, built in the 1960s and just over a mile from the Metro. While not suitable for larger multifamily development like those currently in development, properties like these might lend themselves to redevelopment as duplexes or triplexes to maintain affordability. If an area is already likely to be redeveloped, the town may have the opportunity to guide that process and ensure the resulting housing benefits the community as whole.

Consistently, the desire to balance future development with Herndon's small-town feel was a significant concern to the community. They voiced concerns about increased traffic, and the potential for overcrowding, particularly in areas where new development might add pressure to existing infrastructure. While some underutilized parking areas or parcels may present redevelopment potential, residents agreed that any future projects should include thoughtful design, and adequate infrastructure.

Accessory Dwelling Units

The Town of Herndon has allowed the use of Accessory Dwelling Units (ADUs) by right in single-family units since 2021. The ordinance also removed the restriction on ADUs to those over 62 or disabled. This policy shift came with significant public support at the time in an effort to increase the stock of affordable housing in the town, especially for essential workers. Building and use restrictions do still apply. ADUs cannot exceed 40 percent of the main unit or 1,200 square feet for attached units and 900 square feet for detached units. Only up to three people can live in an ADU in addition to one family in the main unit. Additional parking spots are required, and setbacks are expanded for detached units.

All these requirements are in keeping with local norms and are not considered overly burdensome by ADU standards. But only a few ADUs have been built since the ordinance was passed, indicating either a lack of interest or a lack of ability in the community.

Despite public support for the change in policy, it is likely many homeowners don't know much about accessory dwelling units. Public outreach and education may encourage more homeowners to consider an ADU, making them seem more accessible and viable.

More difficult to address are the other barriers to construction. The cost to build an ADU can range dramatically, in part because an ADU can be anything from a partial basement or garage renovation to a fully separate structure. Currently, estimates range from $200-$400 per square foot for construction. This means that homeowners are investing at least $80,000 for a 400 square foot ADU, and at max nearly $500,000 for a 1,200 square foot unit. That kind of cost is out of reach for many families, and if the intention of the ADU policy is to increase affordable units, these costs are prohibitive.

While the Town is unable to make a direct impact on the cost of construction, there are opportunities to make the construction cost more viable for homeowners. Providing pre-approved ADU plans can lower the cost of development and speed up the process by giving homeowners access to plans that have already been reviewed for building code compliance. This would involve the Town working with an architect or engineer to develop the pre-approved plans, either hiring them and maintaining ownership of the plans within the Town, or allowing firms to submit plans for pre-approval and connecting homeowners to those designers for use. While hiring an architect or engineer will cost the Town more upfront, it would have a greater impact on homeowners' total cost and ease of access. Providing pre-approved plans significantly lowers the barrier to constructing an ADU, as design and permitting can cost homeowners months of time and thousands of dollars, especially for those with little prior experience. This offering, potentially in combination with permit fee waivers, can incentivize ADU development and allow the Town some influence over maintaining local design preferences and character.

KEY FINDINGS AND RECOMMENDATIONS

- Fairfax County Housing is currently an underutilized resource, especially regarding affordable housing development.
- While Herndon is currently one of the only municipalities in Fairfax County without an Inclusionary Zoning ordinance in place given its status as a town, instituting the policy could be viable if done in collaboration with the County.
- The walkable and mixed-use design standards of the HTOC and TRG areas are a potential model to be implemented in additional strategic regions of the Town, encouraging smart growth and resilient communities while preserving the culture and history of Herndon.
- Herndon's Accessory Dwelling Unit Policy opens additional opportunities for residents, but is not often leveraged by homeowners.

Recommendations

- Review the Affordable Dwelling Unit (Inclusionary Zoning) policies, in coordination with Fairfax County administration, to support affordable housing development.
- Align residential zoning regulations to expand opportunities for mixed-density and mixed-use housing types.
- Identify existing extended stay properties suitable for conversion to multifamily with a dedicated workforce or affordable component.

BEST PRACTICES

- Consider establishing pre-approved building structures and an administrative permitting process for expedited affordable housing development.
- Consider establishing pre-approved design and building standards for Accessory Dwelling Units to improve accessibility and affordability of ADU construction.

APPENDIX A: SUPPLEMENTARY DATA

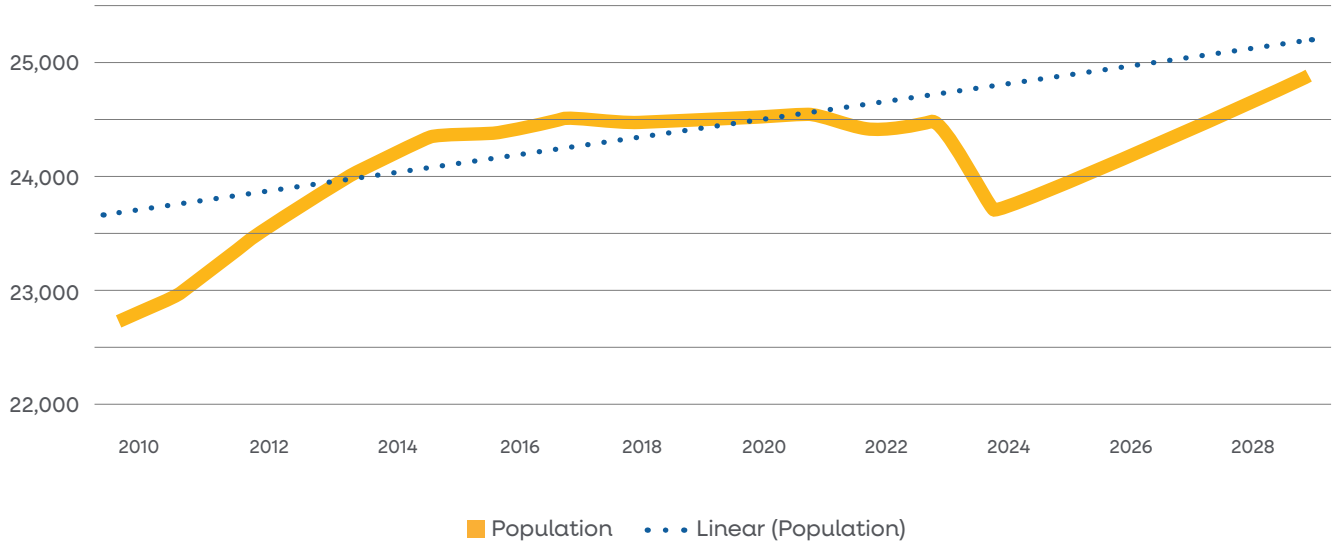
Population Trends

TOTAL POPULATION

After experiencing rapid growth from the period between 2010-2015, the population of Herndon plateaued and has remained generally consistent for almost the past decade. Between 2015 and 2023, the population did not waver up or down by more than 1% until 2024, when it fell by 3.3%. This equates to a loss of an estimated 800 residents.

Figure 7: Town of Herndon Population, 2010 - 2029 (Projected)

Source: U.S. Census Bureau American Community Survey; Table DP05 5-Year Estimates 2010-2023, Lightcast Population Projection Estimates 2024-2030



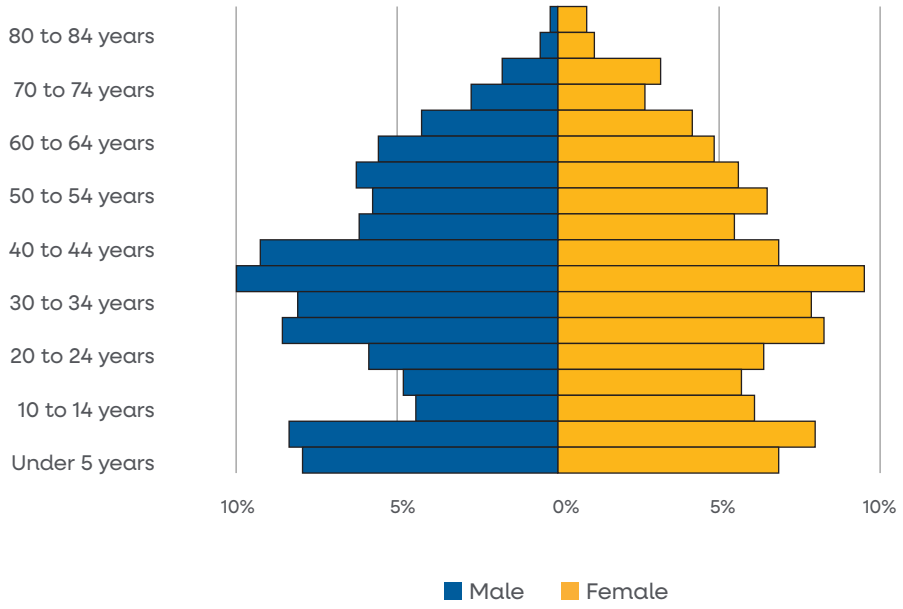
After this 3.3% decline, the population of Herndon is projected to increase by an estimated 4.8% from 2024-2029 for a net increase of 1.5%, bringing the total population of the town to just under 25,000. As a note, this population projection is derived from data collected before the loss and/or furlough of federal government workers in 2025. As will be seen in analyses later in this report, the Town of Herndon is home to over 2,400 civilians working in Federal Government jobs, and, as such, the overall population projection does not and cannot take potential changes in population into account as to the uncertainty of Federal Government jobs may cause relocations of some portion of Herndon's population.

AGE AND GENDER

When looking at the age distribution of the Town of Herndon, a noticeable trend emerges. There are population spikes in the age groups of those 9 years old or younger and those between the ages of 25 and 44. Collectively, these age groups account for 49.72% of the population of the town of Herndon, numbering approximately 12,196 residents based on the American Community Survey estimates of 2023.

Figure 8: Age and Gender Distribution, Town of Herndon

Source: U.S. Census Bureau American Community Survey; Table S0101 5-Year Estimates from 2023



When Figure 8 is compared to the same analysis of Fairfax County, differences emerge. Note that Fairfax County's Age and Gender distribution is flatter. There is a faint resemblance Herndon's distribution, but Fairfax County does not have the peaks of young children and 25-to-44-year-old adults that Herndon has. One explanation for this is that since Fairfax County accounts for a much larger population, the overall distribution of demographic factors is disbursed more evenly through the county than compared to Herndon. What these observations suggest about Herndon, however, is the presence of family units, or at least the presence of adults in prime working age and young children is larger than other age groups and comprises a greater portion of the population than other age groups, and this is different than Fairfax County in which it resides.

MEDIAN AGE

The median age in the Town of Herndon has held steady between 34.5 to 35.7 years of age between samples taken in 2013, 2018, and 2023. Of note, it has shown slight drift upward since 2013, but not by a large margin, approximately .5 years older for every 5 years since 2013.

Overall, the town of Herndon is younger than both Fairfax County and the state of Virginia according to median age. All geographies have gotten older in each time of sampling, with Fairfax County having increased in median age by 2 years between 2013 to 2023. The Town of Herndon most closely mimics the state of Virginia, in that while younger, the median age has only increased by approximately 1 year.

Table 11: Median Age, Herndon, Fairfax County, Virginia

Source: U.S. Census Bureau American Community Survey; Table S0101 1- and 5- Year Estimates from 2023

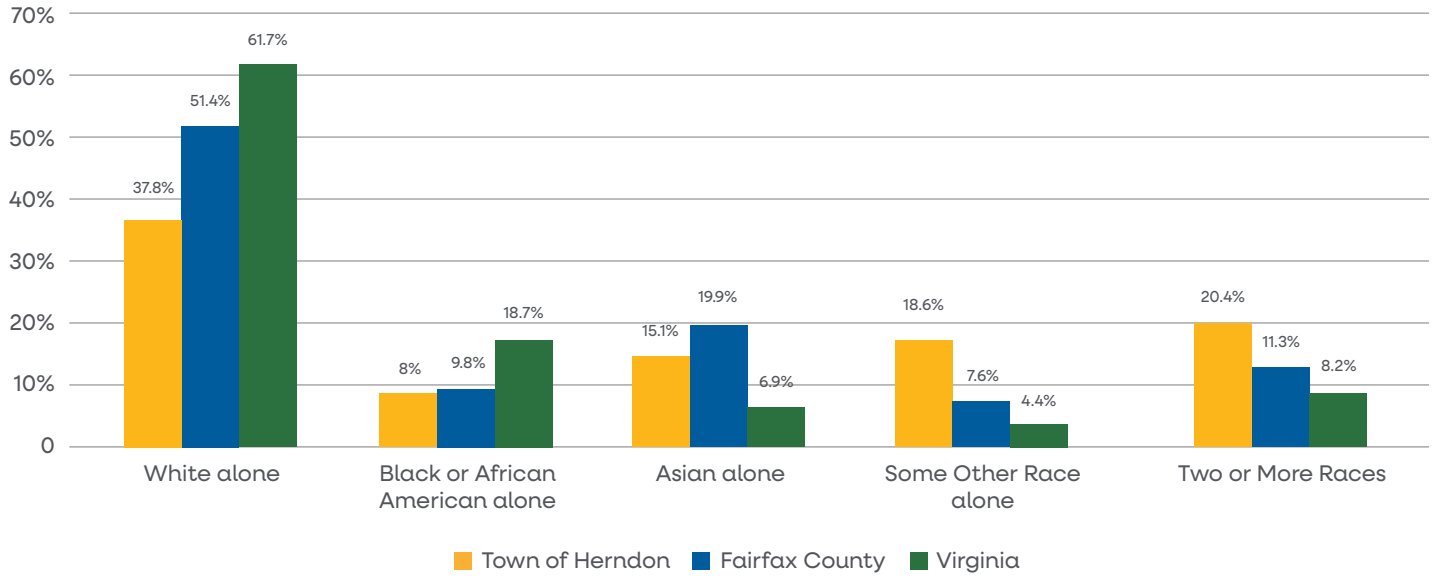
Year	Town of Herndon	Fairfax County	Virginia
2013	34.5	36.9	37.5
2018	35	37.9	38.1
2023	35.7	38.9	38.8

RACE AND ETHNICITY

The Town of Herndon is racially diverse. In 2023, only 37.8% of residents identify as "White alone". This is 13.6% lower than Fairfax County, and 23.9% lower than the state of Virginia. Herndon's racial diversity is indeed a patchwork, as there is not one or two predominant races that constitute the population outside the majority of those indicating they are "White alone". Herndon ranks higher than Fairfax County and the state of Virginia in those that identify as "Some other race alone" or "Two or more races". Eight percent of Herndon residents identify as "Black or African American alone", and 15.1% identify as being Asian alone. Taken together, this paints the picture of a racially diverse community.

Figure 9: Population by Race; Herndon, Fairfax County, Virginia

Source: American Community 2023 Survey 5-Year Estimates



Herndon's current racial diversity is a result of the population trending in this direction. Between 2018 to 2023, the number of residents identifying as "White alone" decreased by 17.7%. This decrease was met by a 4.5% increase in those identifying as "Some Other Race alone", and a 15.8% increase in those identifying as "Two or More Races".

Continuing the trend of racial diversity in Herndon, is the population of those reporting to be of Hispanic or Latino origin. In the Town of Herndon, nearly 40% of residents claim Hispanic or Latino origins. Only 17.4% in Fairfax County and lower still at 10.7% in the state of Virginia report being of Hispanic or Latino Origin.

Table 12: Hispanic and Latino Origin; Herndon, Fairfax County, Virginia

Source: U.S. Census Bureau American Community Survey; Table B03003 1-Year and 5-Year, 2023

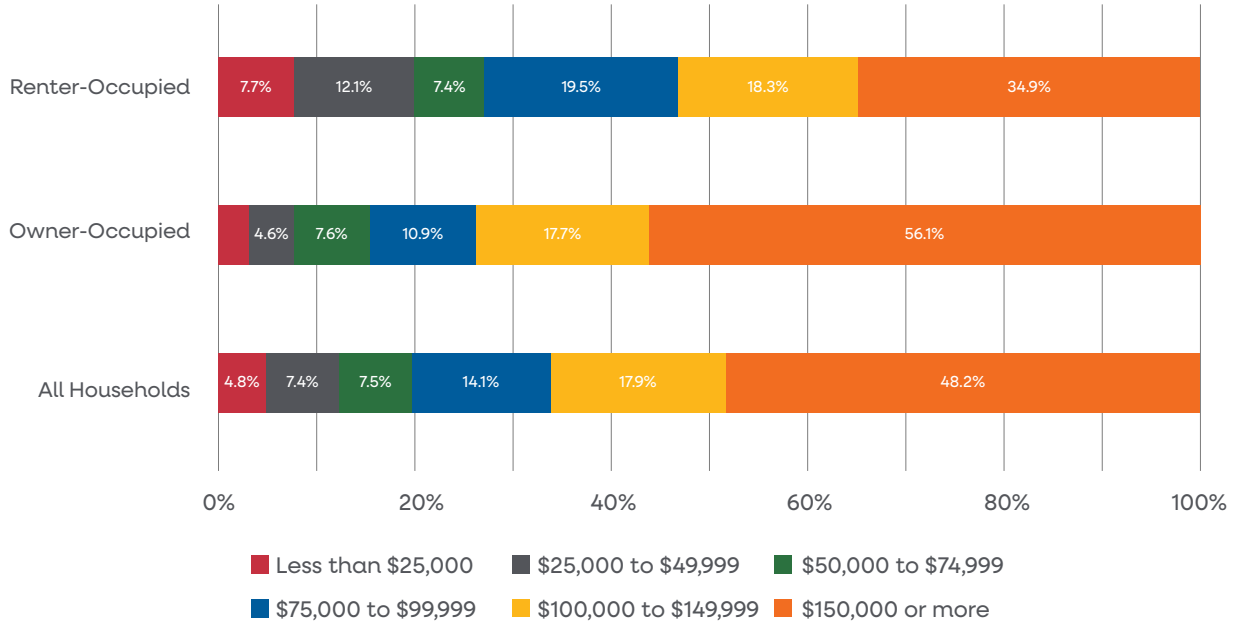
	Town of Herndon	Fairfax County	Virginia
Not Hispanic or Latino	61%	82.6%	89.3%
Hispanic or Latino	39%	17.4%	10.7%

INCOME AND POVERTY

The town of Herndon is an affluent community with nearly half of all households earning $150,000 per year or more. However, when separated out by tenure, a slightly different picture emerges. Owner-occupied households have a larger portion of higher incomes, with 73.8% earning $100,000 or more per year. This is compared to 53.2% of Renter-occupied households earning $100,000 or more per year.

Figure 6: Household Income by Housing Tenure, Herndon

Source: U.S. Census Bureau American Community Survey; Table S2503 5-Year Estimates from 2023



For greater perspective on the difference between Owner-occupied and Renter-occupied households in terms of annual income, the median income for the Town of Herndon is $141,418 per year. Renter-occupied households are 20% beneath this watermark at $113,125 per year in annual income. Owner-occupied households exceed the median income by $35,776 per year, or by a margin of 25%.

Table 13: Median Income by Housing Tenure; Herndon, Fairfax County

Source: U.S. Census Bureau American Community Survey; Table S2503 1- and 5-Year Estimates from 2023

Tenure	Town of Herndon	Fairfax County
Renter-Occupied	$113,125	$94,354
Owner-Occupied	$177,194	$184,510
All Households	$141,418	$150,113

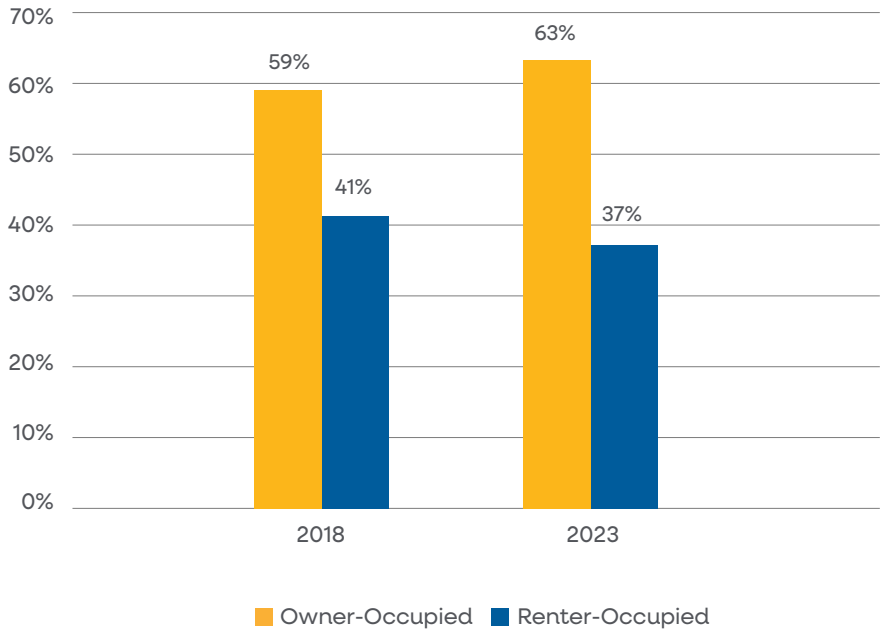
The Town of Herndon is akin to Fairfax County in median income by housing tenure in that Renter-occupied households are beneath the median income for Owner-occupied households, and below the median income level for All households. While this may not be diagnostic of an income-related barrier to homeownership, there is a conclusion to draw that the higher a household's income, the more likely it is to be Owner-occupied, and vice versa for Renter-occupied in the Town of Herndon and in Fairfax County. Additional considerations for the cost of rent as a portion of annual income will be covered later in this report in the Affordability Analysis.

HOMEOWNERSHIP

The relationship between changing rates of renting and homeownership in Herndon is concordant in the period between 2018 and 2023. As seen in the chart below, as the rate of Owner-occupied households increased by 4%, the associated number of Renter-occupied households decreased by 4%.

Figure 5: Town of Herndon Gross Rent, 2018 to 2023

Source: American Community Survey 5-Year Estimate

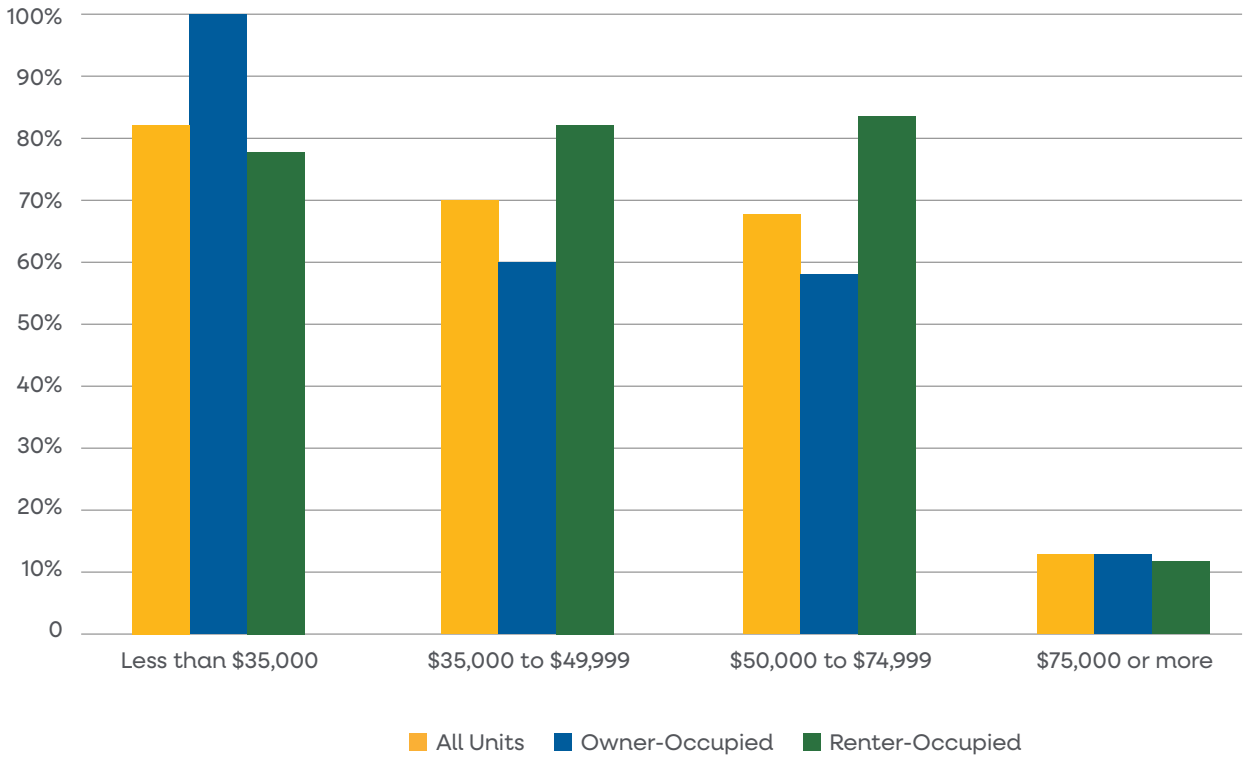


Housing Costs and Affordability

A household is considered severely cost burdened if they are spending more than 50% of household income on housing costs. Like the incidence of cost-burden as a whole, renters are more likely to be severely cost burdened than homeowners. Severely cost burdened households are the most at risk to lose their housing, and the incidence of severe cost burden can be a warning indicator that households are in danger of becoming unhoused.

Figure 11: Cost Burden by Income Bracket and Tenure

Source: American Community Survey 5-Year Estimate



AFFORDABILITY ANALYSIS

The following analysis explores the relationship between the housing costs established to this point and additional information on local wages and affordability.

Table 14: Housing Affordability for 1-Person, Low-Income Household in Town of Herndon

Source: American Community Survey 5-Year Estimates

	Annual Income Limit	Housing Affordability Ceiling	% Monthly Income Median 1-bedroom	% Monthly Income Median 2-bedroom
30% AMI	$42,425	$1,061	34.9%	39.63%
60% AMI	$84,851	$2,121	17.45%	19.81%
80% AMI	$113,134	$2,828	13.09%	14.86%

The Town of Herndon is home to many high-wage industries. The table below shows the top 10 industries in the Town of Herndon according to number of jobs in 2024 by 6-digit NAICS code. NAICS, or the North American Industry Classification System, is a two-to-six digit number classification system for businesses by industry which the federal government uses to collect and analyze economic data.2 Among many of the top 10 industries in the Town of Herndon, the housing affordability ceiling is above the median cost of a 1-or-2-bedroom rental housing unit ($1,720 and $2,141 per month, respectively).3 The housing affordability ceiling is calculated at 30% of an individual's monthly income. None of the top 10 industries in the Town of Herndon are cost-burdened according to the median rent price of a 1- or 2-bedroom apartment, except for those employed in the Supermarkets and other Grocery (except Convenience) Stores.

Table 15: Largest Industries (6-digit NAICS) in Town of Herndon by Number of Jobs

Source: Lightcast and the American Community Survey 5-Year Estimates

Description	2024 Jobs	Average Earnings Per Job	Housing Affordability Ceiling
Computer Systems Design Services	3,379	$211,039.00	$5,275.98
Federal Government, Civilian, Excluding Postal Service	2,463	$177,113.00	$4,427.83
Elementary and Secondary Schools (Local Government)	2,433	$93,934.00	$2,348.35
Corporate, Subsidiary, and Regional Managing Offices	1,750	$259,473.00	$6,486.83
Research and Development in the Physical, Engineering, and Life Sciences (except Nano-technology and Biotechnology)	1,553	$196,923.00	$4,923.08
Engineering Services	1,469	$190,498.00	$4,762.45
Computing Infrastructure Providers, Data Processing, Web Hosting, and Related Services	665	$252,775.00	$6,319.38
Custom Computer Programming Services	516	$197,629.00	$4,940.73
Local Government, Excluding Education and Hospitals	512	$121,935.00	$3,048.38
Supermarkets and Other Grocery (except Convenience) Stores	502	$54,239.00	$1,355.98

While an industry refers to the types of goods and services produced by a business, a person's occupation represents the kind of work they perform. Although a majority of the most common occupations, by number of jobs, have median annual earnings exceeding $100,000 per year, six out of the 10 most common occupations in this list earn under the Annual Median Income of the Town of Herndon, which is $141,418.5 Assuming a 1-income household, Janitors and Cleaners, whose Median Annual Earnings are $36.4k per year, would be considered cost-burdened if renting even a 1-bedroom unit at the median amount of rent.

Table 16: Top Occupations (6-digit SOC) in the Town of Herndon

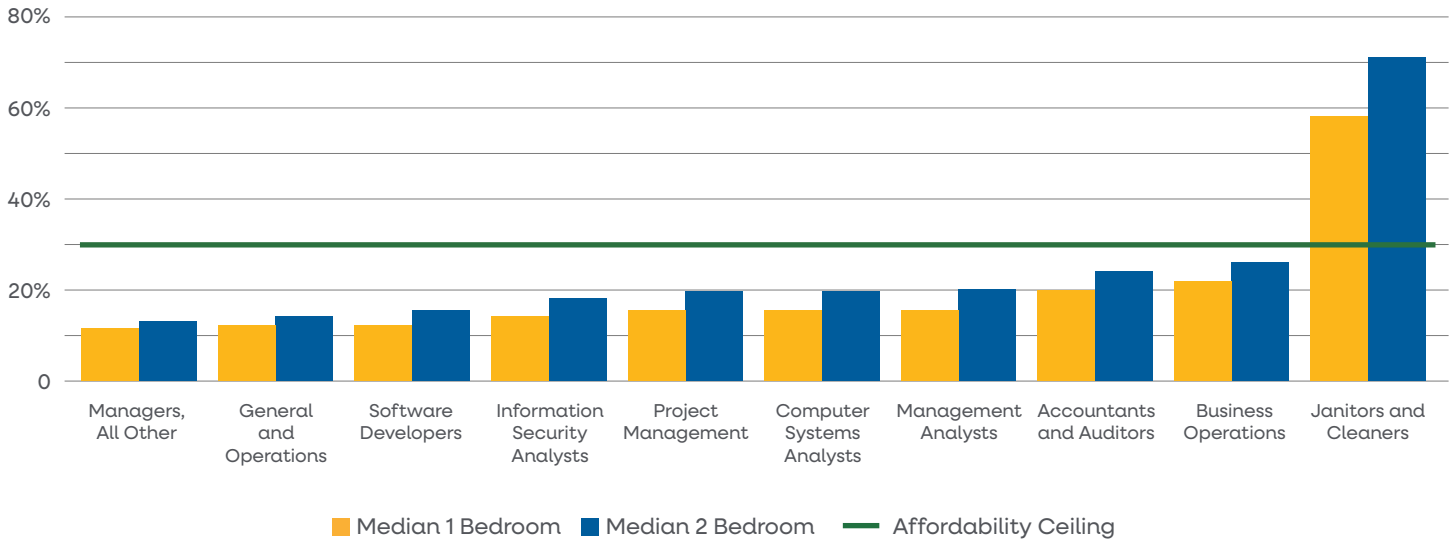
Source: Lightcast and American Community Survey 5-Year Estimates

Occupation	2024 Jobs	Average Earnings Per Job	Housing Affordability Ceiling
Software Developers	1,612	$155,384.31	$3,884.61
Management Analysts	822	$129,813.77	$3,245.34
General and Operations Managers	584	$158,294.44	$3,957.36
Project Management Specialists	574	$139,204.25	$3,480.11
Business Operations Specialists, All Other	525	$100,424.13	$2,510.60
Managers, All Other	401	$175,983.83	$4,399.60
Janitors and Cleaners, Except Maids and Housekeeping Cleaners	383	$36,356.10	$908.90
Information Security Analysts	361	$151,096.12	$3,777.40
Accountants and Auditors	356	$102,389.36	$2,559.73
Computer Systems Analysts	352	$136,592.97	$3,414.82

Below, we see this relationship graphically. The chart shows the relationship between the affordability ceiling and the monthly income of the most common occupations. Among all the most common occupations, the average percentage of monthly income to pay rent for a 1- or 2-bedroom apartment in the Town of Herndon is 15%-19%. In terms of Janitors and Cleaners, that portion of monthly income increases to 57% and 71% for a 1- or 2-bedroom apartment, making them cost-burdened as one of the most common occupations.

Figure 12: Percent of Median Monthly Earnings for Median 1- and 2- Bedroom Rent, Town of Herndon, Top Occupations

Source: Lightcast and American Community Survey 5-Year Estimates



APPENDIX B: PUBLIC SURVEY

The following is a copy of the survey residents were asked to complete. To view survey results, visit the Tableau dashboard.

The Town of Herndon is developing an Affordable Housing Plan with the goal of informing decisions to address current and future housing issues.

The questions in this survey will help your local leaders to better understand public opinions about housing affordability, needs, and a vision for the future.

No personal or other identifying information will be provided to city departments, staff, or elected officials. All information collected in this survey will be aggregated and kept anonymous.

Multiple individuals from the same household are encouraged to take this survey.

1. Which of the following best describes where you live:

- Within the Town of Herndon
- I have a Herndon mailing address
- Within Fairfax County, but not in Herndon
- Outside of Fairfax County, but in the DC Metro Area
- Unsure
- None of the above

2. Which of the following best describes your age:

- 18-24 years
- 25-34 years
- 35-44 years
- 45-54 years
- 55-64 years
- 65-75 years
- Over 75 years

3. How long have you lived in the Town of Herndon?

- Less than 1 year
- 1-5 years
- 6-10 years
- More than 10 years
- I don't live in Herndon

4. Including yourself, how many individuals live in your household?

5. How many children (under 18 years) currently live in your household?

6. Including yourself, how many adults (18-64 years) currently live in your household?

7. Including yourself, how many senior adults (65 years or older) currently live in your household?

8. Including yourself, how many people in your household are currently employed (either full-time or part-time)?

9. Do you currently own or rent your home?

- Own
- Rent
- Other: _____

10. Which of the following best describes your current residence?

- Apartment
- Condominium
- Townhome
- Duplex
- Single-family detached home
- Senior/age-restricted housing
- Other: _____

11. Which of the following best describes your work arrangements?

- I work from home/remote exclusively
- I work hybrid-remote (split time between home and office/on-location)
- I work in-person/onsite exclusively
- I am not currently working/Retired
- Other: _____

11b. In a typical week, how many days do you commute to your job?

- 1
- 2
- 3
- 4
- 5
- 6
- 7
- Other: _____

11c. On the days you commute to your job, how much time does it typically take (one way)?

- Less than 10 minutes one way
- Between 10 and 30 minutes one way
- Between 30 and 60 minutes one way
- Over 60 minutes one way
- Other: _____

12. Over the past twelve months, have you had difficulty affording your housing costs? (Housing costs can include mortgage or rent payments, homeowners or renters insurance, property taxes, homeowners association fees, and/or utilities)

- Yes
- No
- Prefer not to answer
- Other: _____

12b. Are you having difficulty with the cost of maintaining your home? (including: repairs, yard maintenance, water softeners, HVAC, etc.)?

- Yes
- No

13. Are you considering moving out of Herndon due to any of the following reasons? (Select all that apply.)

- No, I am not considering moving out of Herndon
- Availability of jobs in the area
- Commute time
- Property taxes
- Cost of home or renters' insurance
- Cost to buy a home
- Cost to rent a home
- Lack of senior-friendly housing
- I do not live in Herndon
- Other: _____

14. If/when you move to your next home, which type(s) of home would you consider? (Select all that apply.)

- Apartment
- Condominium
- Townhome
- Duplex
- Single-family/Detached home
- Tiny home or Accessory Dwelling Unit
- Senior housing (__)
- I have no intention to move to another home
- Other: _____

15. Please indicate your level of support for each of the following statements on a scale of 1 to 5. Use the arrows to view and respond to each statement.

1 – Strongly oppose
2 – Oppose
3 – Neutral
4 – Support
5 – Strongly support

Herndon needs more housing options with total monthly housing costs _____ (including mortgage, rent, insurance, taxes, and/or utilities):

- Less than $1,500 per month
- $1,501 - $2,000 per month
- $2,001 - $2,500 per month
- $2,501 - $3,000 per month
- Greater than $3,000 per month

16. Please indicate your level of support for each of the following statements on a scale of 1 to 5. Use the arrows to view and respond to each statement.

1 – Strongly oppose
2 – Oppose
3 – Neutral
4 – Support
5 – Strongly support

New housing development in Herndon should prioritize creating additional _____.

- Multifamily development (e.g., apartments and/or condominiums)
- Mixed-use commercial/residential development townhomes
- Detached homes (single-family)
- Manufactured or mobile home
- Tiny homes (less than 800 square feet)
- Accessory dwelling units (e.g., "in-law suites")
- Dedicated affordable housing options (rent or sale price restricted for low-income households, often using subsidies)

17. Please indicate your level of support for each of the following statements on a scale of 1 to 5. Use the arrows to view and respond to each statement.

1 – Strongly oppose
2 – Oppose
3 – Neutral
4 – Support
5 – Strongly support

Future housing policy throughout Herndon should include:

- Additional opportunities for mixed-use development (combination of commercial and residential uses)
- Increased opportunities for accessory dwelling units (e.g., "in-law suites")
- Additional flexibility to build duplexes or triplexes in single-family zones/neighborhoods
- Replacing vacant commercial areas with residential development
- Increasing funding for home-owner rehabilitation projects
- More high-density development (apartment and condominium buildings with multiple stories and 20+ units)
- Incentives for developers to include affordable housing units in new developments
- Creation of a small tax or fee to assist in the creation of affordable housing units
- Increased opportunities for affordable homeownership
- Using public land to create more housing opportunities
- Increased code enforcement of vacant and dilapidated structures
- Education of tenant's rights and enforcement of minimum housing ordinances
- Allowing intergenerational or extended families to live together to share the cost of housing
- Allowing more unrelated people to live together to share the cost of housing

18. Which of the following best describes your annual household income (including all income earners who contribute to housing costs):

Note: All personal information collected in this survey will remain anonymous. This question will help researchers determine the representativeness of survey results.

- Less than $19,999
- $20,000 - $34,999
- $35,000 - $49,999
- $50,000 - $74,999
- $75,000 - $99,999
- $100,000 - $149,999
- $150,000 - $199,999
- $200,000 or more
- Prefer not to answer

19. Please select the language that is most commonly spoken in your home:

- English
- Spanish
- Hindi
- Farsi
- Urdu
- Korean
- Other: _____

20. In the space below, please provide any additional comments you have regarding housing in Herndon.

21. If you would like to stay informed about this project, please provide your email address.

Note: email addresses will be used only for sharing project updates with you and will not be provided or sold to any third-party.

Thank you for completing this survey!

The information collected from these questions will be presented in a Housing Strategic Plan that will be completed later this year.

Multiple people from the same household are encouraged to take this survey.