Herndon 2050
COMPREHENSIVE PLAN

Herndon ECON
MARKET STUDY & ECONOMIC DEVELOPMENT STRATEGY



Analysis Findings & Visioning Update

July 8, 2026

Agency Landscape + Planning
CAMBRIDGE ECONOMETRICS
CBRE Group, Inc
Foursquare ITP
Gorove Slade
LANDAU Design+Technology
NeoNiche Strategies
Sherwood Design Engineers

Project Schedule

We are here

2026 2027

NOV DEC JAN FEB MAR APR MAY JUN JUL AUG SEP OCT NOV DEC JAN FEB MAR APR MAY JUN JUL AUG

MSEDS

Milestone Meetings

Planning Commission / Town Council

Focus Groups +Interviews

Stakeholder Engagement Plan

Data Collection + Analysis

Market Analysis

Economic Positioning + Development Trends

Economic Development Strategic Action Plan

Implementation Plan

Final Report

Herndon 2050

Planning Commission /Town Council

Milestone Meetings

Community Conversations

Community Awareness

Community Conversation

Community Conversation

Community Conversation

Public Review of Draft Plan

Phase 1 Project Launch + Background Res.

Phase 2 Opportunity Framework

Phase 3 Visioning + Future Comprehensive Plan

Phase 4 Plan Development and Documentation

Phase 5 Plan Adoption

Early Action Plans

Monthly SC Meetings

1

Progress Update

Overview of Phase 2 Analysis Findings and Visioning Community Engagement

Community conversations so far

Phase 1reached more than **1,650 residents, employees, and visitors** across in-person and digital channels.

1,650+

Total community touchpoints

across in-person events and online channels

480

Online Survey Responses

442 English · 38 Spanish

1,300+

Pop-Up Interactions

across 13 events

15

Pop-Up & Canvassing Events

Libraries, parks, metro

75

Paper Surveys Completed

50 English · 25 Spanish

73

Vision Wall Interactions

Tent activity at events

1,100+

Postcards Distributed

492 English · 138 Spanish



Fortnightly Library



Herndon Metro Station

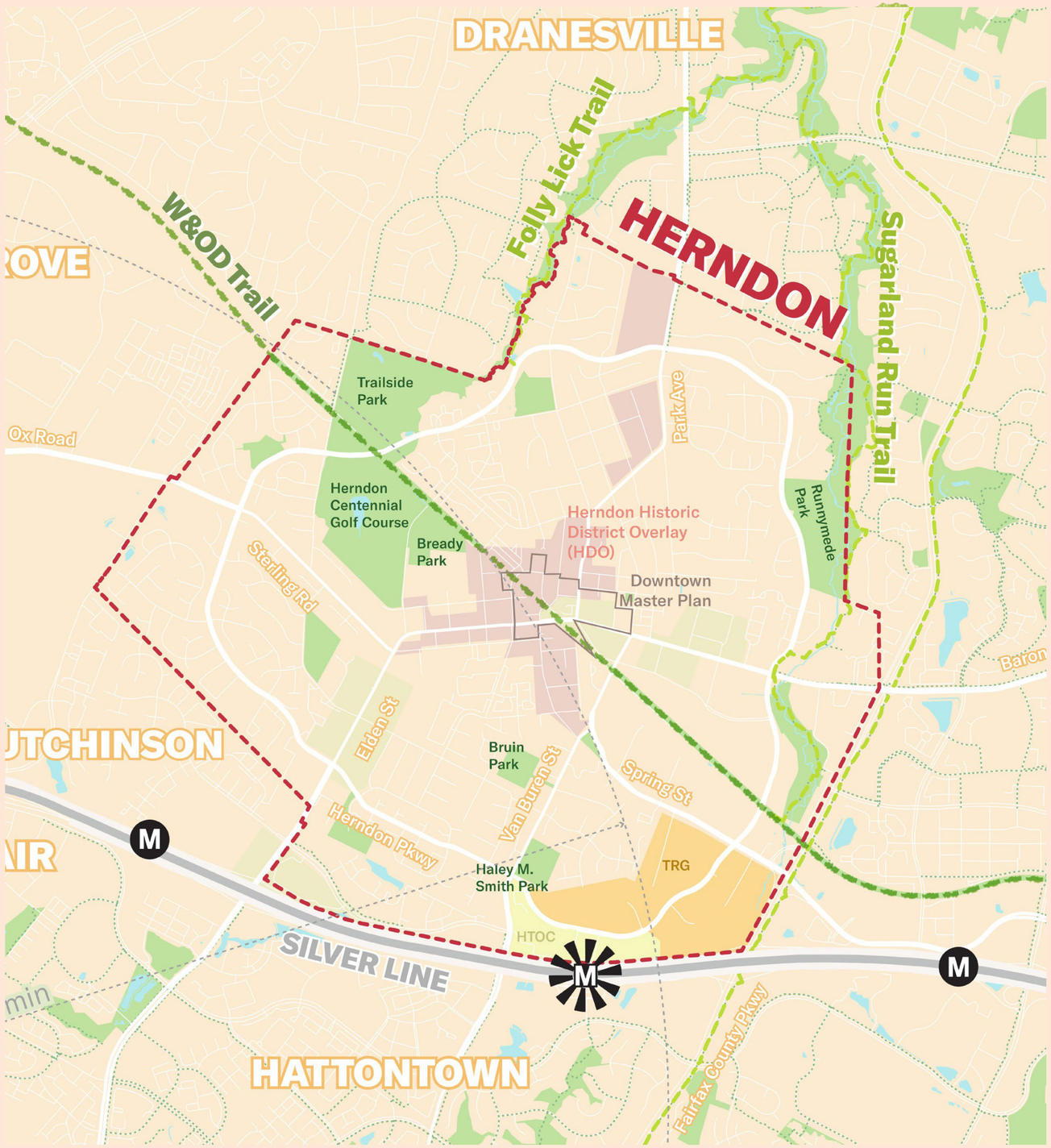


Freshworld



Community Center

1 Herndon's Strengths in the Region



What differentiates Herndon from regional peers?

Authentic, walkable Downtown

Strong **sense of community, small town charm,** and high **quality of life**

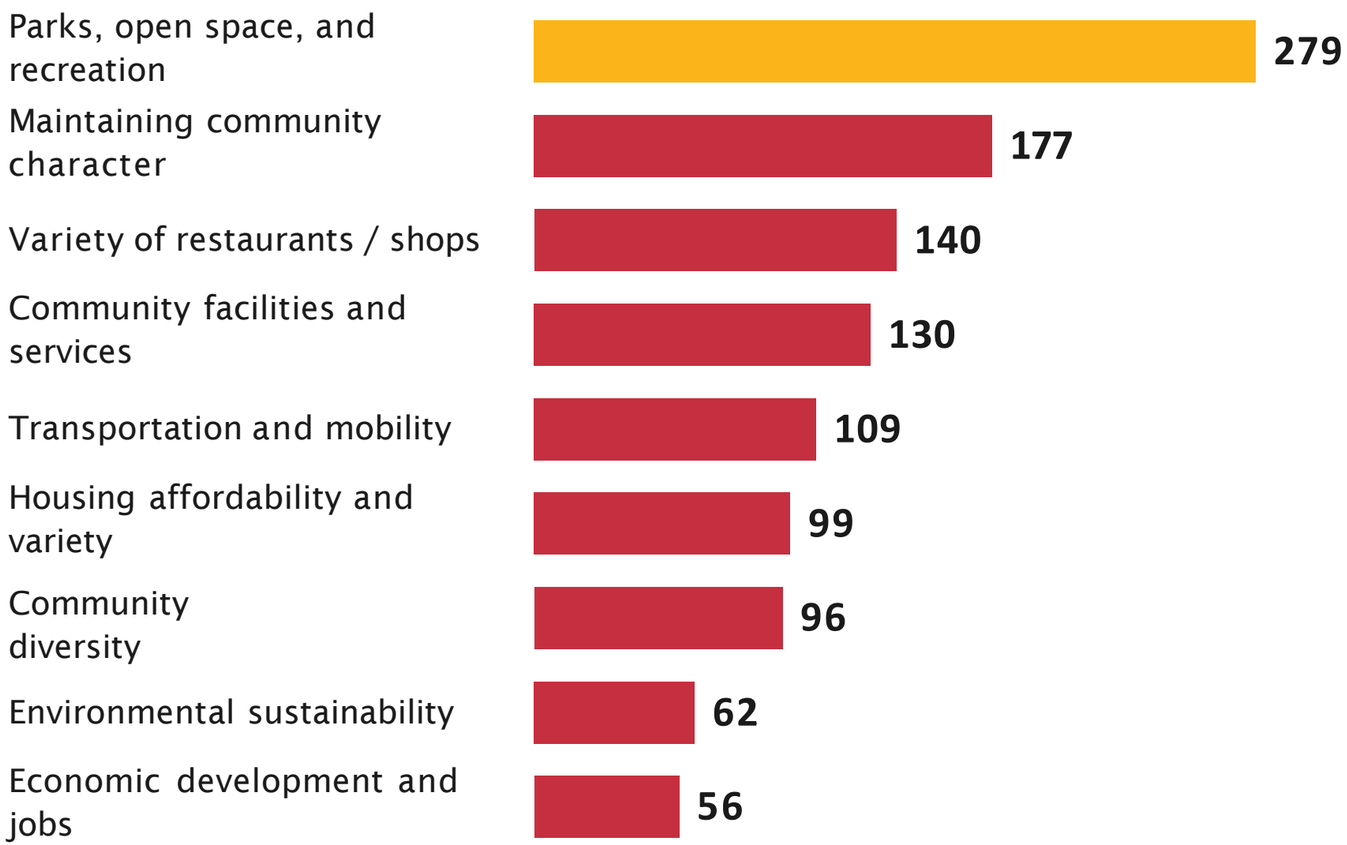
Flexible, affordable office and light industrial spaces



How community members value Herndon today

Residents, visitors, and employees appreciate the Town's parks, community character, and restaurants/shops.

TOP RESPONSES



Total number of respondents: 480

WHAT THE NUMBERS REVEAL

Parks led by a wide margin

More than half of all respondents named parks, open space, and recreation as a top value — by far the clearest signal in the dataset.

Place identity matters

Maintaining community character (177) leads variety of restaurants/shops (140) for #2 and #3 — residents want both continuity and vibrancy, with character slightly ahead.

Housing edges ahead of diversity

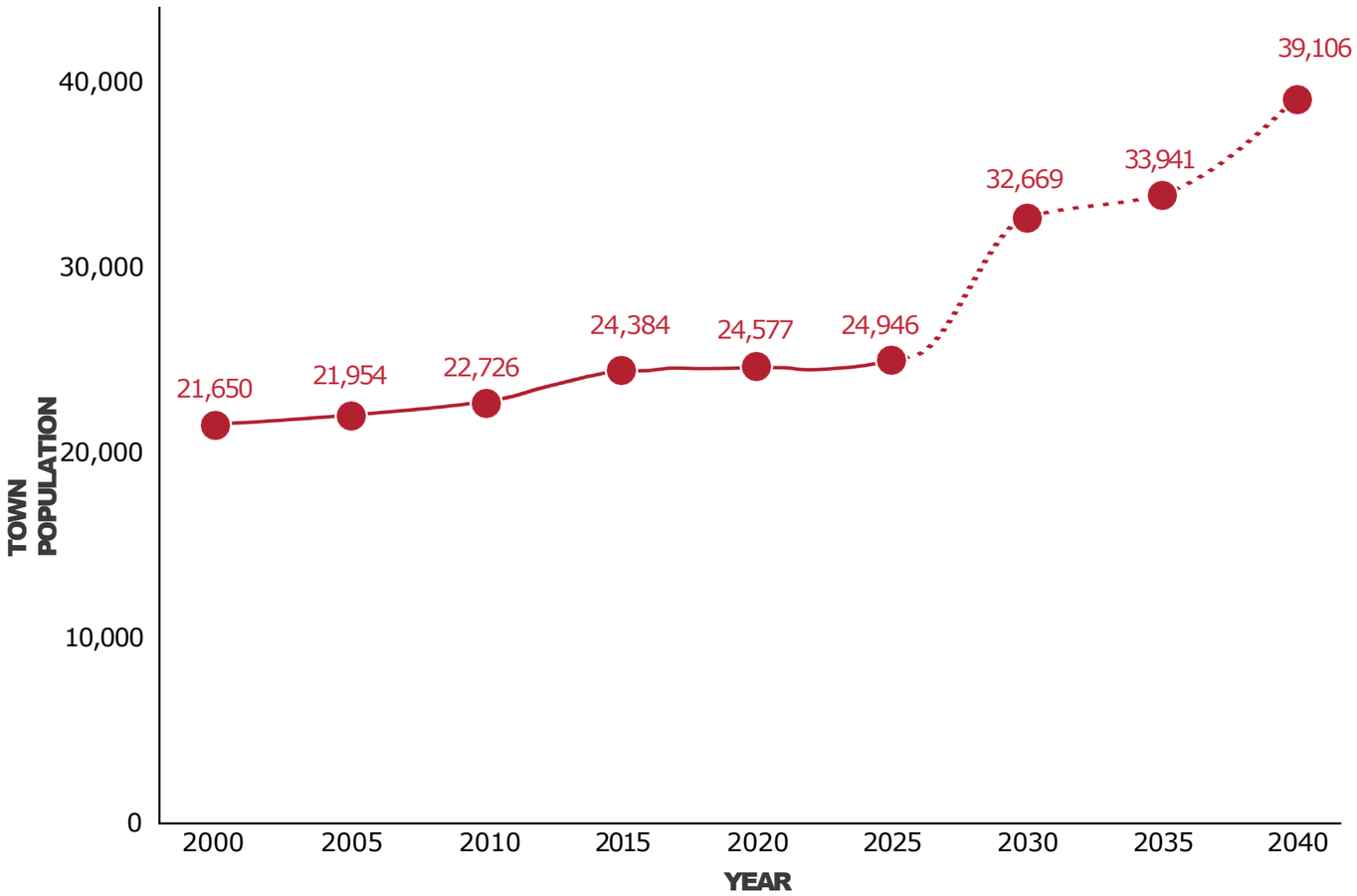
Housing affordability (99) narrowly outranks community diversity (96) — both rated meaningfully, with affordability quietly climbing as a stated priority..

3 Significant Growth on the Horizon



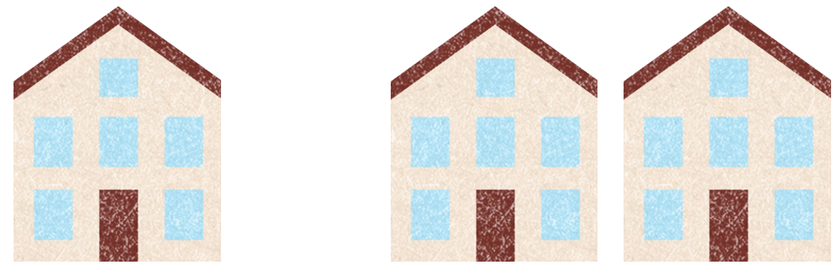
Population growth is on the horizon

After a decade of slight growth, Herndon's population is projected to climb steeply to **32,700 residents by 2030** and **39,100 by 2040**, representing a **58% increase.**



Data Source: Town of Herndon Projections

The number of **housing units is predicted to more than double** by 2040.



8,000

2024

17,000

2040

Herndon ECON

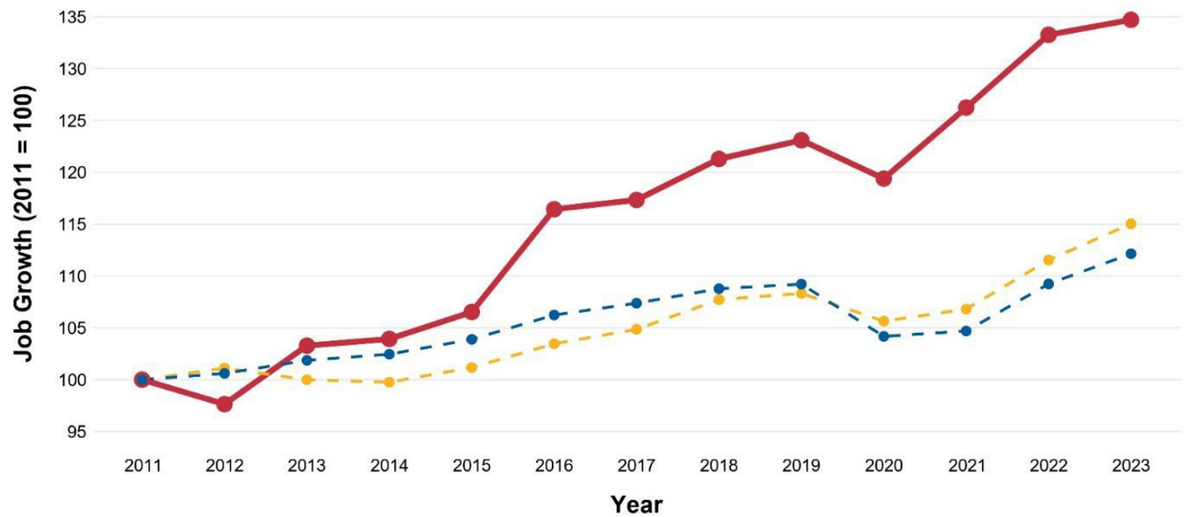
4 Economic Strengths and Real Estate Market Realities



Jobs in Herndon

- The total number of jobs in Herndon grew by 35% between 2011and 2023.

- Most of the town's job growth came form the professional, scientific, and technical services sector, which accounts for about 41% of Herndon's jobs.



- Employees who work in Herndon vary from the resident workforce in education, ethnicity , and job types.

Worker Base	Race: White alone	Ethnicity: Hispanic or Latino	Educational Attainment		Share in Professional Services
			High School or Equivalent	Bachelor's Degree or Higher	
Resident Workforce	67%	25%	16%	30%	21%
Employed in Herndon	65%	11%	19%	47%	41%

Geography	Total Jobs	Job Growth Rate (Since 2011)	Jobs to Population Ratio
Herndon Town	23,199	35%	0.95
Vienna Town	12,586	16%	0.77
Leesburg Town	25,623	35%	0.53
Fairfax City	24,910	7%	1.02
Falls Church City	10,691	9%	0.73
Manassas City	22,287	1%	0.52
Loudoun County	195,681	41%	0.46
Fairfax County	683,496	15%	0.60
Virginia	3,894,892	12%	0.45

Drivers of future economic performance

Herndon’s economic trajectory will be shaped by four interconnected structural shifts redefining how firms operate, where jobs are created, and what communities must offer to attract investment.

Digital Infrastructure & AI

- Global AI investment projected at ~$660B in 2026
- Virginia data centers generated $40B in statewide economic impact
- Dulles Corridor supplier network is a key opportunity for Herndon

Federal Spending & Contracting

- Roughly 23,500 civilian federal jobs lost in Virginia through Nov 2025
- Defense IT spending remains strong
- Civilian budget uncertainty makes economic diversification urgent

Commercial Real Estate Dynamics

- Regional office vacancy at about 22%
- Herndon's commercial tax share declined from 43% to 35% (2020–2025)
- Flight to quality for ‘trophy’ office space

Workforce & Technology Diffusion

- About 39% of core skills expected to change by 2030
- AI-skilled workers commanding 50%+ wage premiums
- Quality-of-life factors increasingly drive location decisions

Commercial real estate – Macro market trends

#1: FLIGHT TO QUALITY

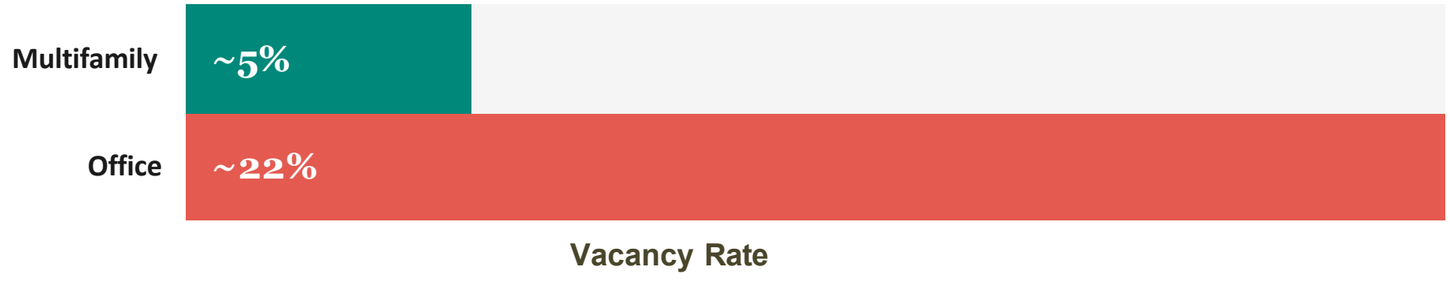
Tenants are upgrading to premium space even as they downsize, tightening top-tier availability in core submarkets.

#2: VIBRANCY & MIXED-USE DEVELOPMENT IS KEY

Larger occupiers of affordable space are embracing remote/hybrid work while those committing to physical office space are prioritizing high-quality properties within mixed-use developments.

#3: THE VACANCY GAP

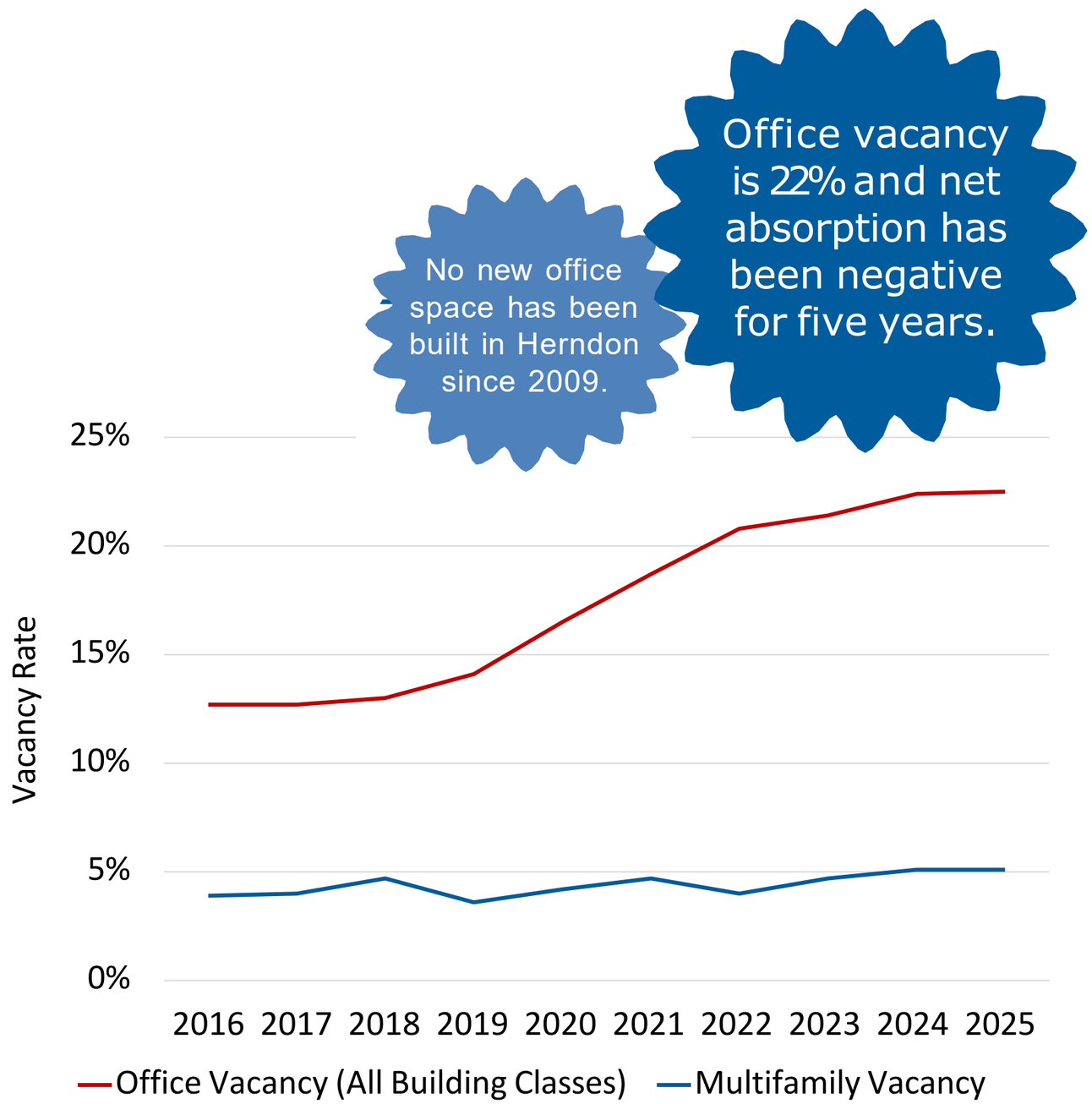
A 17-point vacancy spread is driving conversions from commodity office to alternative uses like multifamily.



Commercial real estate takeaways: Office market

The office sector faces persistent structural challenges of flight-to-quality trends: high vacancy and negative net absorption.

- Lack of trophy office product inhibits the town's ability to capture demand of midsized and large tenants.
- Opportunities for new development are strongest in the high-vacancy office cluster in southeast Herndon, but would require significant investment and must be part of a larger vision.
- Conversion activity is likely to accelerate as the market is signaling that the highest and best use for certain Herndon office assets may no longer be office.



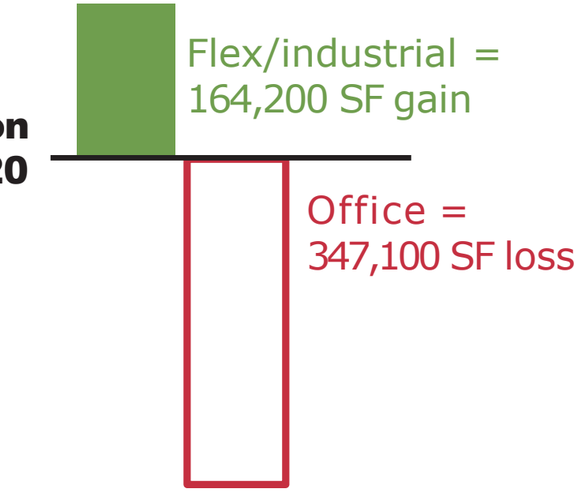
Commercial real estate takeaways: Industry/Flex

Herndon's flex/industrial market is well-positioned: supply-constrained, affordably priced, and supported by strong captive tenant base.

- Scarce regional availability and no development pipeline.
- Opportunities for development are most likely within the cluster of higher-vacancy office buildings along the east side of Van Buren Street, between Elden Street and Spring Street.

Flex/industry market is one Herndon's strongest economic assets

Net absorption since 2020

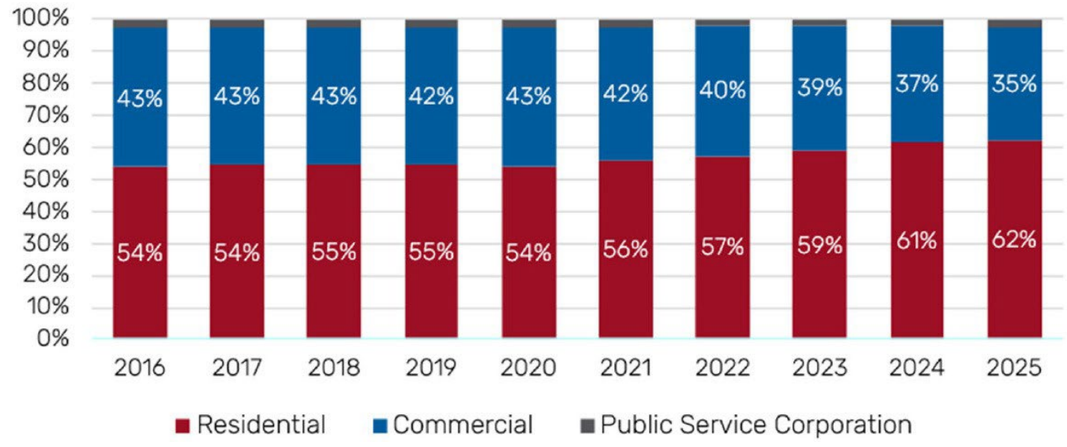




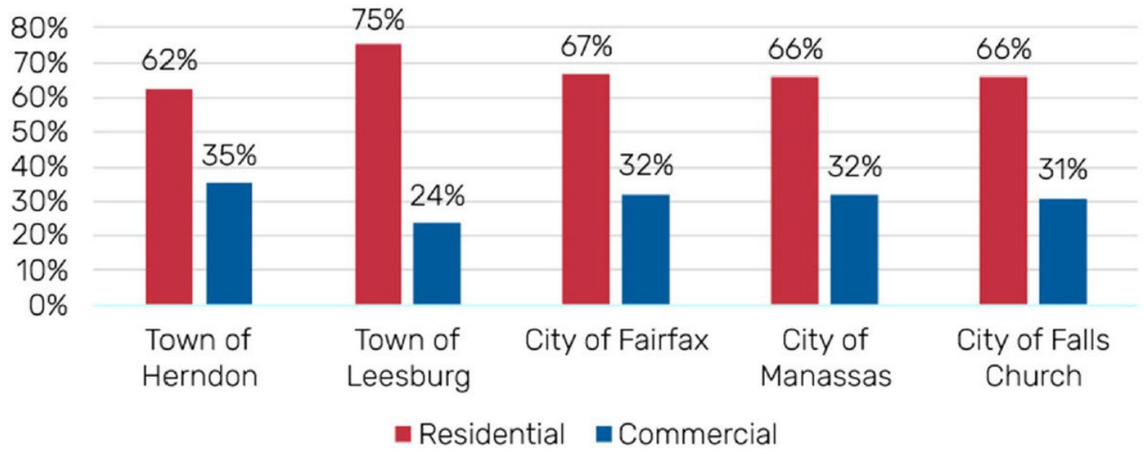
Commercial and residential balance

Herndon’s share of commercial property tax revenue has decreased but remains higher than comparison areas.

Tax Contribution



Tax Contribution



Increasing residential population

Exploring new economic models

Economic strategy ideas from interviews

“I see the Metro area as a destination for restaurants and entertainment, which can bring more tax revenue.”

“I’d like to see how we can create support for smaller businesses and what it would take to keep them in the Town.”

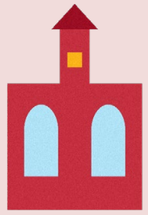
Interviews with Mayor, Town Council, and Planning Commission

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Visioning Updates

Community Vision Themes

Ideas heard repeatedly across the survey, pop-up events, and canvassing.

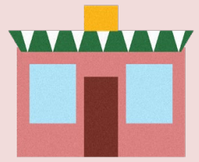


01

Small-Town Character, Thoughtful Growth

Preserve what makes Herndon feel like Herndon while allowing the town to evolve. Most growth should happen in commercial areas, not residential neighborhoods.

177 cited community character as most-valued

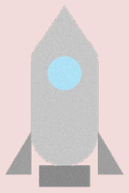


02

A Vibrant, Walkable Downtown

Strengthen Downtown as a destination — fill vacancies, support local shops and restaurants, and create more places to gather.

302 chose 'Strengthen Downtown' as a priority



03

Local Business & Fiscal Vitality

Fill vacant storefronts, attract independent businesses over chains, and broaden the commercial tax base to support town services long-term.

267 want to redevelop aging commercial areas



04

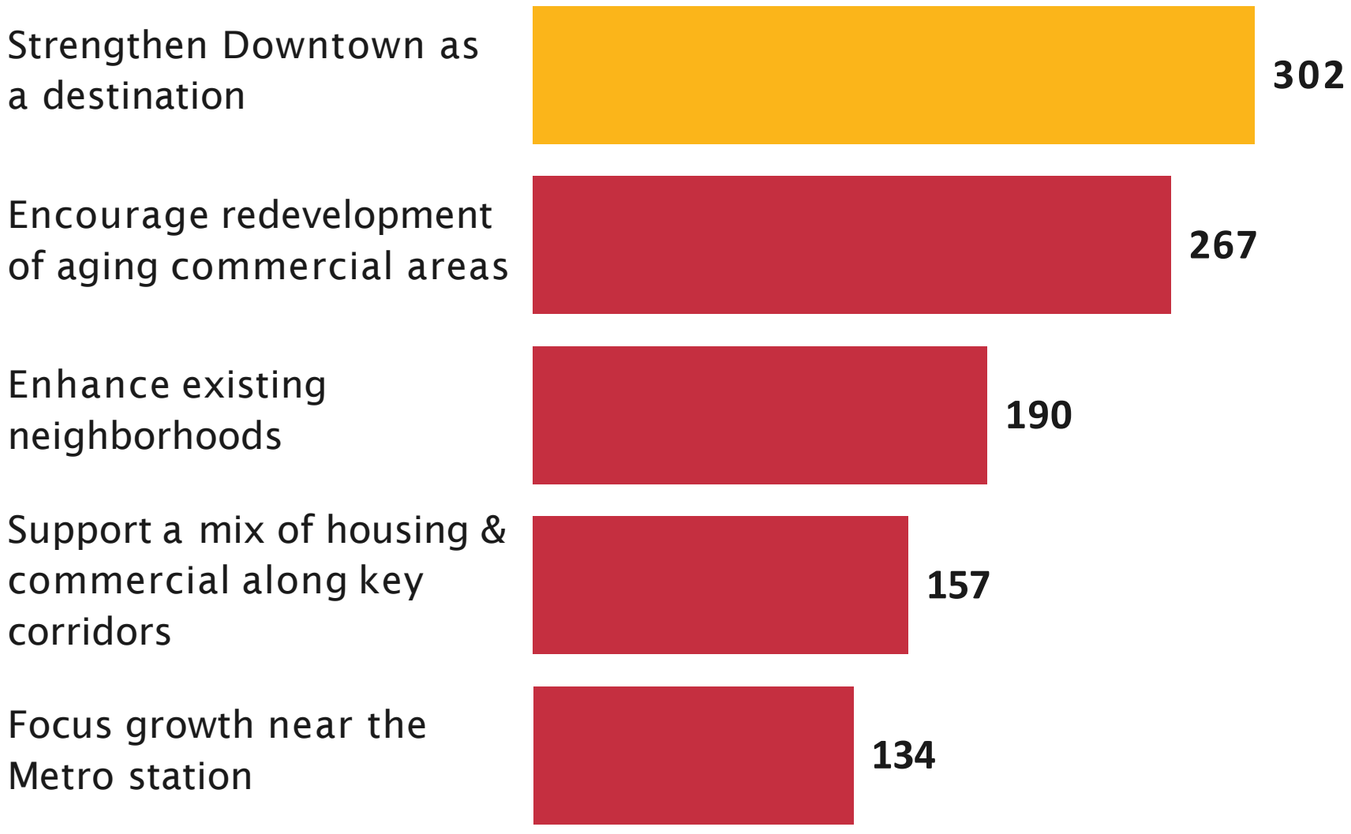
A Connected, Safe Community

Invest in walkability, pedestrian safety, parks and tree canopy, and the civic events that bring residents together.

279 cited parks & open space as most-valued

How should Herndon grow in the future?

TOP RESPONSES



WHAT THE NUMBERS REVEAL

Downtown is the consensus answer

Strengthening Downtown was selected by nearly 7 in 10 respondents — the clearest single direction in the entire survey.

Redevelop, don't expand

The top three answers all focus on improving what's already there rather than spreading growth into new areas.

Corridor & Metro growth follow

Mixed-use along corridors and Metro-area growth round out the priorities, suggesting transit-supportive density.

Draft Town Vision Statement

By 2050, Herndon is a thriving and welcoming town where distinctive small-town character meets the opportunity of a dynamic region. Recognized for its strong economy, connected neighborhoods, and inclusive community, Herndon offers exceptional employment opportunities, parks, civic spaces, and cultural experiences that enrich everyday life.

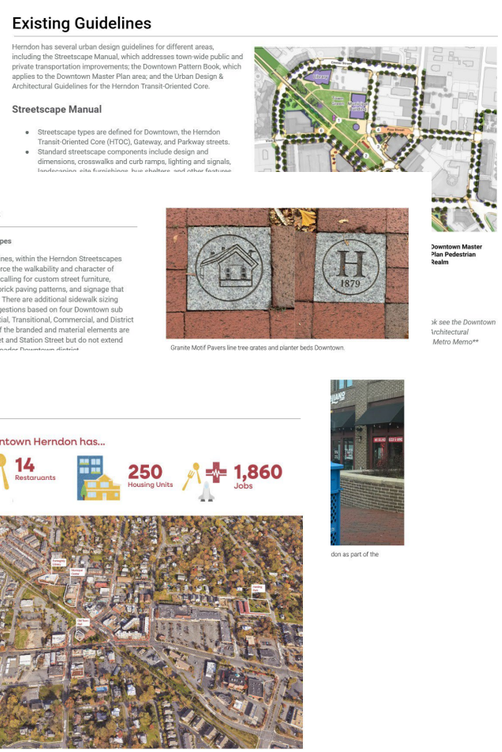
Safe and accessible transportation, resilient natural systems, and thoughtfully integrated growth create a community that is both sustainable and prosperous. While embracing change, Herndon remains true to the qualities that make it uniquely Herndon—a place where people feel connected, businesses thrive, and generations choose to call home.

LET'S DISCUSS

3

Update on Early Action Plans: Downtown and Metro Area

EAP Process



Existing Guidelines

Herndon has several urban design guidelines for different areas, including the Streetscape Manual, which addresses town-wide public and private transportation improvements; the Downtown Pattern Book, which applies to the Downtown Master Plan area; and the Urban Design & Architectural Guidelines for the Herndon Transit-Oriented Core.

Streetscape Manual

- Streetscape types are defined for Downtown, the Herndon Transit-Oriented Core (HTOC), Gateway, and Parkway streets.
- Standard streetscape components include design and dimensions, crosswalks and curb ramps, lighting and signals,

Streetscapes

Herndon Downtown Streetscapes

Downtown Streetscape guidelines, within the Herndon Streetscapes Manual, are designed to reinforce the walkability and character of Herndon's historic Downtown, calling for custom street furniture, decorative details, distinctive brick paving patterns, and signage that builds on the Town's branding. There are additional sidewalk sizing suggestions and planting suggestions based on four Downtown sub categories of streets: Residential, Transitional, Commercial, and District entrances. In practice many of the branded and material elements are most visible around Lynn Street and Station Street but do not extend

Granite Motif Pavers line tree grates and planter beds Downtown.

Downtown Master Plan Pedestrian Realm

*ok see the Downtown Architectural Metro Memo**

Downtown at a Glance

Downtown Herndon is a compact, walkable district built around a core of historic mixed-use buildings, where ground-floor storefronts, local restaurants, and cafés sit beneath offices and residential units. Civic anchors like Old Town Hall and the Fortnightly Library give the area a strong sense of place and community identity.

The dining scene adds real vitality to the streetscape — from casual lunch spots to sit-down restaurants.That daytime population is fueled in part by the area's role as a growing employment center, with office space and professional services concentrated along its main corridors.

The Washington & Old Dominion Trail runs directly through Downtown, embedding a strong bike culture into everyday life and connecting Herndon to a broader regional trail network that stretches across Northern Virginia. This makes the area unusually accessible by bicycle for a suburban downtown, and reinforces a pedestrian-friendly character that distinguishes it from surrounding commercial areas.

Downtown Herndon has...

14 Restaurants

250 Housing Units

1,860 Jobs

don as part of the



HERNDON 2050 — METRO AREA EAP · CM#3 GOALS REVIEW MATRIX · June 24, 2026

Goals Review Activity Results — 25 draft goals were provided to the committee across 5 themes | Four committee groups reviewed and rated each goal

	KEEP ✓	REVISE –	DROP ✕	VERDICT	KEY NOTES & REVISIONS	★ BIG IDEA
Area as a true mixed-use, transit-oriented district — diverse housing, tive ground-floor retail within walking distance of the Silver Line.	4	0	0	KEEP ★	Unanimous across all groups. Strongest consensus goal of the entire exercise.	*Adopt a Metro Area form-b use thresholds.*
velopment starting with residential density and public realm to build attract future employment and commercial uses.	1	2	0	STRATEGY	Multiple groups flagged this as a strategy/reality, not a goal. Reframe as a guiding principle or implementation note.	*Establish a sequenced Met investment triggers.*
Area identity anchored in Herndon's multicultural character through blic art, and community-driven placemaking.	2	2	0	REVISE	Keep with revision: replace 'multicultural' with 'unique' (Groups A & D). Retain design standards and placemaking language.	*Develop a Metro Area Bran public art strategy.*
ownership of 18+ parcels through a coordinated approach — dedicated per partnership, or district coordinating role.	2	2	1	REVISE	Keep with revision: remove specific solution types; reframe as 'program to implement a consistent vision and support ongoing activation' (Group C).	*Explore a Metro Area Distri redevelopment and sustain*
t beyond Class A office — Encourage experience-based destinations, paces, and small business incubators.	1	2	1	REVISE	Rename to 'Commercial Diversity.' Replace 'prioritizing' with 'encouraging'; treat listed uses as illustrative examples. Group C voted to drop.	*Develop a Metro Area Ecor incentive tools.*
rs with retail, food & beverage, arts, and services that generate daytime ic activity — a place people choose to be.	3	1	0	KEEP ★	Top priority across all groups. Revise: replace 'Activate' with 'Strategically activate.' Big idea: activation that results in a place people want to be — not just filled ground floors.	*Create a Ground-Floor Acti permitting, and pop-up incu*
nt generates a strong, diversified tax base — balancing residential growth ail, and employment uses.	3	1	0	KEEP	Strong support across Groups B, C, D. Group A: replace 'Ensure' with softer commitment language (incentivize / support).	*Commission a Metro Area I fiscal return.*
and minority-owned businesses as economic anchors through le commercial space, and business development programs.	2	2	0	REVISE	Retain but revise: strike 'as economic anchors' (Group A). Broaden to 'locally-rooted business' framing. Group B: don't single out minority-owned separately.	*Establish a Metro Area Loc community loan fund.*
, food trucks, cultural events, and temporary uses to generate activity and rm redevelopment proceeds.	3	0	0	KEEP	Strong support. Groups noted this should extend 'beyond' temporary uses — use as a sustained activation strategy, not just a placeholder.	*Designate an Interim Activa*
housing into new mixed-use development as a baseline requirement — rea is accessible to residents at all income levels.	2	1	1	REVISE	Significant division. Groups A & D: address Town-wide, not Metro-Area-specific. Groups B & C kept. Recommend reframing as encouragement; note Town-wide policy provides the broader framework.	*Adopt an Affordable Housir residential projects above a*
ousing types, sizes, and price points — workforce, senior, and ving the full diversity of Herndon's community.	3	1	0	KEEP ★	Top priority across Groups B, C, D. Revise: add young professionals / under-35 households as an explicitly named demographic (Group B).	*Develop a Metro Area Hou by income band*
idents, local businesses, and cultural institutions from displacement ctions and community benefit agreements.	1	0	3	DROP / SOFTEN	Dropped by Groups A, C, D. Group B skeptical. Recommend softening to 'encourage and incentivize.' Group C: real goal is creating flexible spaces for displaced businesses.	*Encourage flexible spaces anti-displacement commitm*
alth services, libraries, and cultural venues as integrated components of elopment program.	1	2	1	REVISE	Mixed. Groups A & D dropped or skeptical. Recommend reframing: 'encourage flexible spaces for community-serving uses including childcare, health, and cultural venues.'	*Require community facility to a Metro Area Community*

Existing Conditions Analysis

COMPLETED

Visioning Input from Steering Committees

COMPLETED

Vision Statement and Goal Development

UNDERWAY

PHASE 2 ANALYSIS FINDINGS

4

Next Steps

- Vision Statement Refinement
- Draft Goals
- Developing Future Scenarios

Scenario Planning

Tool to study multiple potential futures for Herndon

Explore **key challenges, risks,** and **opportunities** facing the town

Not about voting for one favorite; preferred approach will be a **blended or hybrid approach**

What is the town's priority around office given the current market?

What are the trade-offs between concentrating density at one or two centers versus distributing it more broadly along corridors and neighborhoods?

What is the desired balance of transportation investments between cars and multimodal choices?

Test different land use and density options

THANK YOU