

ROUND 8.0 FORECAST

DECEMBER 2010

Arlington's 2040 Growth Forecast: 131,700 Housing Units; 252,000 Residents; and 281,100 Jobs

Overview

The Planning Division's latest forecast, Round 8.0, shows that Arlington is expected to continue to grow its housing stock, population, and employment over the next 30 years, reaching a total of 131,700 housing units, 252,000 residents, and 281,100 jobs.

The Round 8.0 forecast, adopted by the Metropolitan Washington Council of Governments (MWCOC) in November 2010, estimates that Arlington will increase in housing, population, and employment by rates of 24.8%, 18.7%, and 35.0% respectively from 2010 to 2040.

The Metro Corridors, the Rosslyn-Ballston (R-B) Corridor and Jefferson Davis (JD) Corridor, and three Planned Areas (Columbia Pike, Nauck, and Shirlington) are projected to capture the majority of growth, see Table I. The Metro Corridors combined are predicted to capture 71.7% of new housing units, 63.1% of all population growth, and 86.6% of all employment growth in the County.

Housing Units

Growth is not distributed equally throughout the Metro Corridors, with some areas capturing more growth than others. Crystal City is forecast to add the largest amount of new housing (6,000 units), accounting for 22.9% of all new units. Table I shows that Columbia Pike will add the second most units (3,900 units, 14.9% of all new units), followed by Pentagon City (3,700 units, 14.1% of all new units).

Crystal City and Pentagon City have the highest growth rates at 81.1% and 74.0%. The R-B Corridor is planned to have a slower growth rate of 31.5%. However, within the R-B Corridor, Clarendon is projected to grow by 71.4% by 2040, a rate closer to that of the JD Corridor.

The forecast projects no housing unit increases for the Shirlington area between 2010 and 2040. Shirlington added over 600 residential units between 2005 and 2010, reaching its growth potential according to assumptions. Population and employment are also not planned to increase in Shirlington.

Table I: Round 8.0 Forecast for Arlington County, Metro Corridors, and Planned Areas*

Geography	Housing Units					Population					Employment				
	2010	2040	Growth Rate	Net Change	% of Change	2010	2040	Growth Rate	Net Change	% of Change	2010	2040	Growth Rate	Net Change	% of Change
R-B Corridor	28,900	38,000	31.5%	9,100	34.7%	45,300	57,400	26.7%	12,100	30.6%	98,700	133,300	35.1%	34,600	47.5%
Rosslyn	7,200	10,200	41.7%	3,000	11.5%	10,900	14,700	34.9%	3,800	9.6%	38,200	54,900	43.7%	16,700	22.9%
Courthouse	7,500	8,800	17.3%	1,300	5.0%	11,700	13,400	14.5%	1,700	4.3%	16,800	23,100	37.5%	6,300	8.6%
Clarendon	2,800	4,800	71.4%	2,000	7.6%	4,400	7,100	61.4%	2,700	6.8%	5,500	10,600	92.7%	5,100	7.0%
Virginia Square	3,700	4,700	27.0%	1,000	3.8%	6,000	7,600	26.7%	1,600	4.0%	7,900	8,800	11.4%	900	1.2%
Ballston	7,700	9,500	23.4%	1,800	6.9%	12,300	14,600	18.7%	2,300	5.8%	30,300	35,900	18.5%	5,600	7.7%
JD Corridor	12,400	22,100	78.2%	9,700	37.0%	17,200	30,100	75.0%	12,900	32.6%	37,200	65,700	76.6%	28,500	39.1%
Pentagon City	5,000	8,700	74.0%	3,700	14.1%	6,500	11,200	72.3%	4,700	11.9%	12,400	22,200	79.0%	9,800	13.4%
Crystal City	7,400	13,400	81.1%	6,000	22.9%	10,700	18,900	76.6%	8,200	20.7%	24,800	43,500	75.4%	18,700	25.7%
Planned Areas	20,600	24,900	20.9%	4,300	16.4%	46,600	54,700	17.4%	8,100	20.5%	15,300	22,500	47.1%	7,200	9.9%
Columbia Pike	17,100	21,000	22.8%	3,900	14.9%	40,400	47,700	18.1%	7,300	18.4%	11,300	18,300	61.9%	7,000	9.6%
Nauck	700	1,100	57.1%	400	1.5%	1,500	2,300	53.3%	800	2.0%	300	500	66.7%	200	0.3%
Shirlington	2,800	2,800	0.0%	0	0.0%	4,700	4,700	0.0%	0	0.0%	3,700	3,700	0.0%	0	0.0%
Other Areas	43,600	46,700	7.1%	3,100	11.8%	103,300	109,800	6.3%	6,500	16.4%	57,200	59,600	4.2%	2,400	3.3%
Total	105,500	131,700	24.8%	26,200	100.0%	212,300	252,000	18.7%	39,700	100.0%	208,200	281,100	35.0%	72,900	100.0%

* Figures may not sum due to rounding.



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Population

These additions to the housing stock allow for Arlington's population to steadily increase. Crystal City is predicted to have the largest share, 20.7% (8,200 persons), of the population increase among the Metro Station Areas and Planned Areas. Comparable to the housing unit increases, Crystal City is followed by Columbia Pike (7,300 persons, 18.4%) and Pentagon City (4,700 persons, 11.9%) for the largest shares of the population change.

The J-D Corridor is forecast to have the highest population growth rate over the next 30 years, increasing by 75.0%, compared to the R-B Corridor at 26.7%. Individual areas with high growth rates from 2010 to 2040 include Crystal City (76.6%, adding 8,200 residents), Pentagon City (72.3%, adding 4,700 residents), and Clarendon (61.4%, adding 2,700 residents).

Employment

Employment is forecast to steadily increase over the next 30 years, with the total number of jobs surpassing population between 2015 and 2020, see Figure 1.

Following the population trends, most of the new job growth will occur in the Metro Corridors. Crystal City will gain 18,700, which accounts for 25.7% of all new jobs by 2040. However, the R-B Corridor is forecast to add more total jobs than the J-D Corridor. About half, 16,700, of the new jobs in the R-B Corridor are planned to occur in Rosslyn, followed by Court House (6,300), Ballston (5,600), Clarendon (5,100), and Virginia Square (900).

Clarendon is expected to have the highest jobs growth rate, 92.7% in the next 30 years, almost doubling employment from 5,500 to 10,600 jobs. The Metro Station Areas in the J-D Corridor follow in growth rates with Pentagon City and Crystal City increasing by 79.0% and 75.4% respectively.

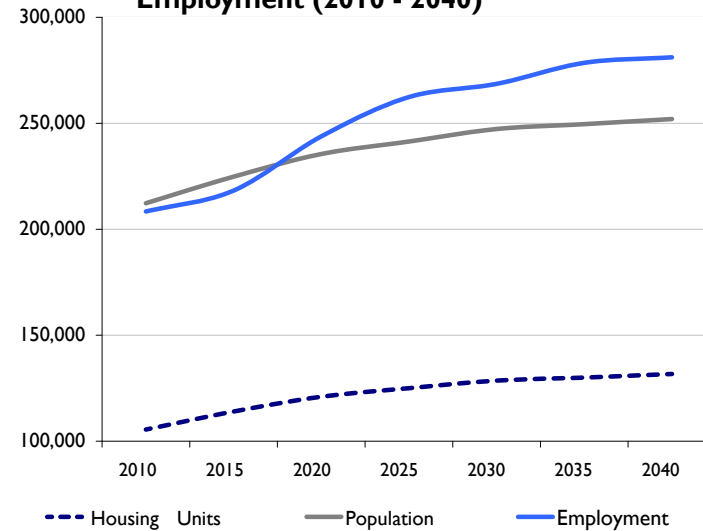
Planned Areas are forecast to add about 7,200 jobs, with a combined growth rate of 47.1%. Looking at individual Planned Areas, Nauck is forecast to increase in jobs by almost 66.7% or 200 jobs and Columbia Pike will increase by 61.9% or 7,000 jobs.

Assumptions

The Round 8.0 Forecasts portray growth according to the County's GLUP with amendments through winter 2009/2010. Assumptions were developed based on small area plans and discussions with County planners. The County's Form Base Code along Columbia Pike, Clarendon Sector Plan, and Crystal City Sector Plan are examples of plans that are factored into the forecasting analysis. County staff are currently developing an East Falls Church Area Plan and Columbia Pike Land Use and Housing Study. Once completed, new development and redevelopment associated with the final plans, will be incorporated into future forecasts.

The forecast includes the anticipated impacts of the Base Realignment and Closure (BRAC) Commission's 2005 mandate. An estimated 17,000 jobs could leave the County due to BRAC, largely from the Crystal City area. County staff estimate that these job losses will occur between 2010 and 2015, but will be back filled as redevelopment of vacated office space occurs.

Figure 1: Round 8.0 Housing Units, Population, and Employment (2010 - 2040)



About the Forecast

Staff in the Planning Research and Analysis Team of the Arlington County Department of Community Planning, Housing and Development completed the Round 8.0 Forecast in October 2009 as a part of the MWCOG Cooperative Forecasting process. These forecasts include data from 2005 through 2040 in five year increments. The Planning, Research and Analysis Team supplements each forecast Round with biannual estimates of current housing units, population, and employment.

The data from the forecast are components of the MWCOG regional transportation model and the regional air quality analysis. County staff, politicians, residents and media also use Arlington's forecast to help frame and understand future trends in the County.

For more information about Arlington's Round 8.0 Forecast, visit www.arlingtonva.us/PRAT.

The Planning Research and Analysis Team (PRAT) is part of Arlington County Planning Division and is responsible for maintaining, analyzing, and disseminating information related to planning development and demographics.

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