

ROUND 8.1 FORECAST

March 2012

Arlington's 2040 Growth Forecast: 129,600 Housing Units; 252,400 Residents; and 308,400 Jobs

Overview

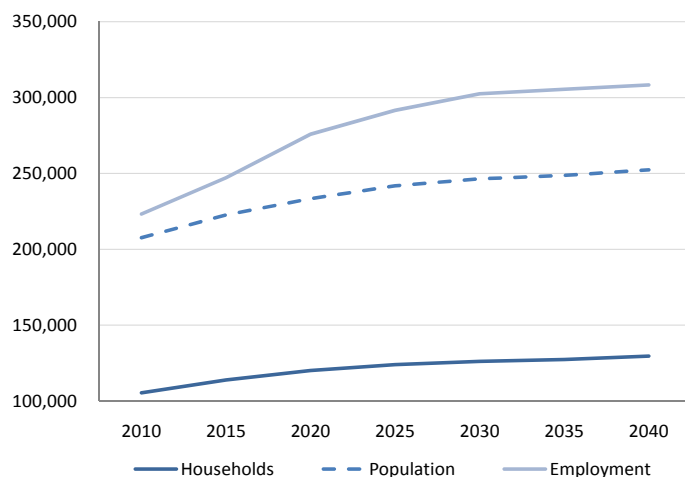
The Planning Division forecasts Arlington to steadily grow, reaching totals of 129,600 housing units, 252,400 residents, and 308,400 jobs by 2040. (See Figure 1)

The majority of the growth is forecast to occur in the Rosslyn-Ballston (R-B), Jefferson Davis (JD), and Columbia Pike Corridors. These three corridors will capture 84.3 percent of new housing units, 83.0 percent of population growth, and 95.5 percent of job growth. The remainder of growth will occur in other areas, including Lee Highway, Nauck, East Falls Church, Shirlington, and all areas not considered Metro Station Areas (MSAs).

While housing units and population are expected to grow at similar rates of 23.0 percent and 21.6 percent, respectively, jobs are predicted to grow by 38.1 percent.

These numbers are part of the Round 8.1 regional forecast submitted to the Metropolitan Washington Council of Governments (MWCOG). It is expected that this forecast will be adopted by the region in fall 2012.

Figure 1: Round 8.1 Forecast for Arlington County



Housing Units

By 2040 the housing unit stock is expected to grow by 23.0 percent (24,200 units), equivalent to an average of just over 800 units annually. The vast majority of these additional units are multi-family dwellings - dwellings with three or more units per building.

Over half (64.9 percent) of the housing unit growth is planned to occur in the R-B and JD Corridors. Crystal City, Pentagon City, and Rosslyn are projected to receive the largest shares of new housing units among all Metro Station Areas. However, the Columbia Pike Corridor is planned to receive 19.4 percent of new housing units, greater than any MSA.

As shown in Figure 2 below, the Pentagon City MSA is predicted to have the highest growth rate at 68.6 percent or 3,500 units. The Clarendon MSA is predicted to grow at a similar rate (60.7 percent), but with only half the total amount of units as the Pentagon City MSA.

Figure 2: Round 8.1 Housing Unit Forecast*

	2010	2040	Net Change	Growth Rate	Growth Share
R-B Corridor	28,700	37,500	8,800	30.7%	36.4%
Rosslyn	7,300	10,200	2,900	39.7%	12.0%
Courthouse	7,300	8,900	1,600	21.9%	6.6%
Clarendon	2,800	4,500	1,700	60.7%	7.0%
Virginia Square	3,700	4,800	1,100	29.7%	4.5%
Ballston	7,700	9,200	1,500	19.5%	6.2%
JD Corridor	13,100	20,000	6,900	52.7%	28.5%
Pentagon City	5,100	8,600	3,500	68.6%	14.5%
Crystal City	7,900	11,400	3,500	44.3%	14.5%
Columbia Pike	16,400	21,100	4,700	28.7%	19.4%
Other Areas	47,300	51,100	3,800	8.0%	15.7%
Total	105,400	129,600	24,200	23.0%	100.0%

*Figures may not sum due to rounding.



ARLINGTON VIRGINIA

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Population

Arlington's population is predicted to reach 252,400, an increase of 21.6 percent or 44,800 persons by 2040. This is an average annual growth of about 1,500 persons.

The majority of the population increase will occur in the R-B, Columbia Pike, and JD Corridors at 36.6, 27.5, and 19.0 percents, respectively. Seventeen percent (7,600 persons) of the population growth will occur in other areas,

The Clarendon MSA is predicted to have the fastest population growth among all MSAs in the county. Over the next 30 years, the MSA is expected to grow by 71.4 percent, 3,500 persons. The Pentagon City MSA has the second highest growth rate, 66.2 percent or 150 persons per year. (See Figure 3).

Figure 3: Round 8.1 Population*

	2010	2040	Net Change	Growth Rate	Growth Share
R-B Corridor	46,900	63,300	16,400	35.0%	36.6%
Rosslyn	10,800	15,300	4,500	41.7%	10.0%
Courthouse	12,500	15,600	3,100	24.8%	6.9%
Clarendon	4,900	8,400	3,500	71.4%	7.8%
Virginia Square	6,100	8,200	2,100	34.4%	4.7%
Ballston	12,600	15,800	3,200	25.4%	7.1%
JD Corridor	17,400	25,900	8,500	48.9%	19.0%
Pentagon City	6,800	11,300	4,500	66.2%	10.0%
Crystal City	10,600	14,600	4,000	37.7%	8.9%
Columbia Pike	36,000	48,300	12,300	34.2%	27.5%
Other Areas	107,300	114,900	7,600	7.1%	17.0%
Total	207,600	252,400	44,800	21.6%	100.0%

*Figures may not sum due to rounding.

Employment

The Planning Division's 2010 estimate of the number of jobs in the county outweighs the total residential population. The number of jobs is predicted to continually be greater than the population, growing by an average of 2,800 jobs per year.

A total of 85,100 jobs will be added to the county by 2040. Of these jobs, 93.9 percent of the growth will occur in the R-B and JD Corridors – with over half of all growth occurring in the R-B corridor alone. Rosslyn will capture the largest percent, 28.7 percent, of all job growth, equivalent to 24,400 jobs. Similarly, Crystal City is predicted to capture 25.9 percent (22,000 jobs) of all job growth.

By 2040, employment in the Pentagon City MSA is predicted to more than double, increasing by 13,500 jobs. Clarendon and Rosslyn are also predicted to have high growth rates of 72.6 percent and 71.3 percent, respectively. (See Figure 4)

Figure 4: Round 8.1 Employment*

	2010	2040	Net Change	Growth Rate	Growth Share
R-B Corridor	94,300	138,700	44,400	47.1%	52.2%
Rosslyn	34,200	58,600	24,400	71.3%	28.7%
Courthouse	15,300	17,900	2,600	17.0%	3.1%
Clarendon	7,300	12,600	5,300	72.6%	6.2%
Virginia Square	8,900	13,000	4,100	46.1%	4.8%
Ballston	28,600	36,600	8,000	28.0%	9.4%
JD Corridor	54,700	90,200	35,500	64.9%	41.7%
Pentagon City	10,500	24,000	13,500	128.6%	15.9%
Crystal City	44,200	66,200	22,000	49.8%	25.9%
Columbia Pike	9,600	11,000	1,400	14.6%	1.6%
Other Areas	64,700	68,400	3,700	5.7%	4.3%
Total	223,300	308,400	85,100	38.1%	100.0%

*Figures may not sum due to rounding.

Assumptions

The Round 8.1 Forecasts portray growth according to the County's GLUP with amendments through Fall 2011. 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.

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 MSA. 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.

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 8.1 Forecast in February 2012 as a part of the MWCOG Cooperative Forecasting process. These forecasts include data from 2010 through 2040 in five year increments. It is expected that this forecast will be adopted by MWCOG in fall 2012.

The data from the forecast will be 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 8.1 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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