

# Demographic Update

## Population Estimates, Births, and Migration

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Joint Facilities Advisory Commission

February 28, 2024



# Agenda

## 1. 2023 Housing Development Update

- Current Snapshot
- Development Trends
- Development Pipeline

## 2. Population Estimates

- Age Distribution
- Age Trends

## 3. Components of Population Change

- Births
- Deaths
- Migration

# **2023 Housing Unit Update**

# Development Data

## Development Tracking Database

- Track County Board actions and construction permits.
- Quarterly and Annual Reports
- Open Data
- [www.arlingtonva.us/Government/Projects/Data-Research/Development](http://www.arlingtonva.us/Government/Projects/Data-Research/Development)

## Master Housing Unit Database (MHUD)

- All housing in Arlington
- Housing unit type, owner or renter occupied, committed affordable units, etc.
- Open Data
- <https://gisdata-arlgis.opendata.arcgis.com/> (Search for MHUD)

**Development Tracking Report** Fourth Quarter 2023  
Community Planning, Housing & Development (CPHD) October 1, 2023 to December 31, 2023

This Development Tracking Report, produced by the CPHD Research and Strategic Initiatives Group, provides a summary of county-wide development activity for the Fourth Quarter of 2023 (October 1, 2023 - December 31, 2023) and includes development highlights, summary statistics, and information on active development applications. Detailed data tables based on project status (approved, under construction, completed, and demolished) for this quarter are included as an attachment.

**Highlights**

- The Commodore, Clarendon West (West Block), and the Urban (Harris Theater site) projects were completed, adding in total over 1,100 residential units and over 88,000 SF of retail in the County.
- The County Board approved a new assisted living facility for Sunrise Senior Living (SP #473) located at 716 S. Glebe Rd. with 96,291 SF of gross floor area.
- Expanded Housing Option (EHO) regulations went into effect on July 1, 2023. 16 EHO permits were approved during fourth quarter totaling 62 units. The table below summarizes issued permits and units for new EHO projects by zoning district. An EHO is a zoning entitlement which does not authorize construction or occupancy.

**Development Tracking Dashboard**  
<https://arlingtonva.us/Government/Development/>  
The Development Tracking Dashboard provides an online interactive experience with the development data for this quarter, trends since 2013, and development within and outside the Planning Corridors.

**Project Photos**  
<https://www.flickr.com/photos/arlingtonva/>  
Project photos from staff site visits can be viewed through the Research Team Flickr account.

**Summary of Development Statistics for Fourth Quarter (4Q) 2023**

	Office (GFA)	Retail (GFA)	Other (GFA)	Hotel (Rooms)	Residential Units		
					Total	Multi-Family*	Single-Family AD
Approvals**	-	-	96,291	62	62	-	
Construction Starts	-	-	-	31	-	30	
Completions	-	84,398	-	-	1,248	1,195	
Demolitions	-	-	-	26	-	-	

\*\*The multi-family residential unit subtotal includes high-rise buildings, garden-style buildings, townhouses, duplexes (both single parcel and lots-by-lot parcel duplexes), and EHOs. \*\*Includes Phased Development Site Plan (PDS) projects.

**Expanded Housing Option Statistics by Zoning District Fourth Quarter (4Q) 2023**  
After receiving an EHO permit, an applicant still needs an approved building permit and associated trades permits before construction can begin. Upon completion, a Certificate of Occupancy is needed before anyone can move into any EHO dwelling unit. For an up-to-date list, please review the [EHO Tracker](#) on our website.

	Permits			Units*		
	R-5	R-6	R-8, 10, 20	R-5	R-6	R-8, 10, 20
Issued	3	13	-	15	47	-
Construction Starts	-	-	-	-	-	-
Completions	-	-	-	-	-	-

\*EHO units are also reflected in Summary of Development Statistics table above.

**Development Summary**

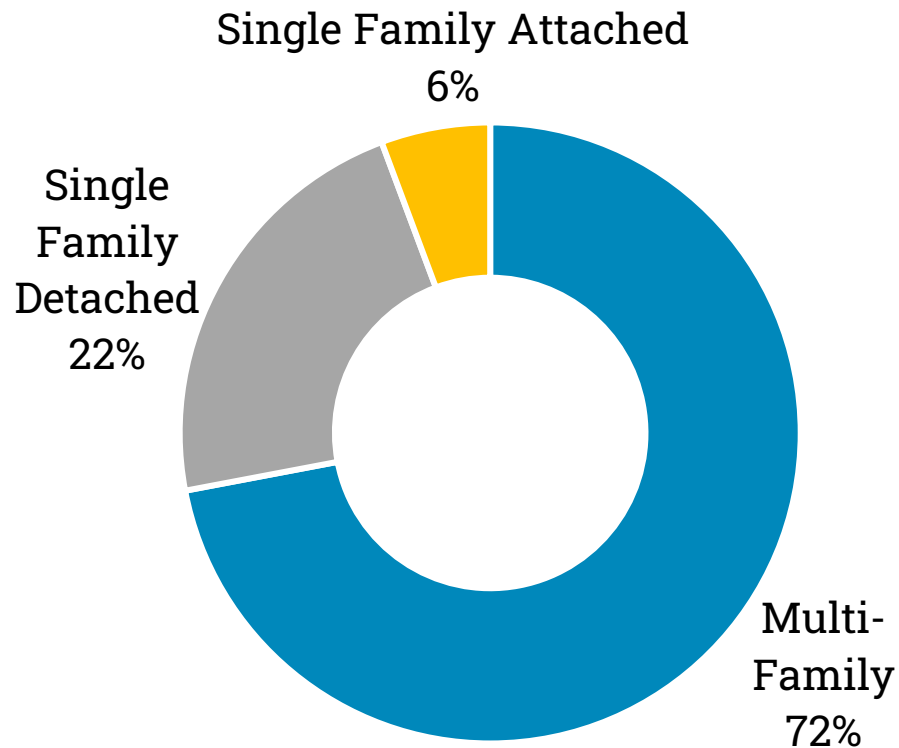
- Approvals**
  - Sunrise Senior Living (SP #473) with 96,291 SF gross floor area for an assisted living facility.
  - 16 EHO Permits issued totaling 62 units
- Construction Starts**
  - 1 accessory dwelling
  - 30 single family homes
- Completions**
  - The Commodore (SP #457): 423 residential units and 17,000 SF retail
  - Clarendon West (SP #438): 267 residential units
  - The Urban (SP #4125): 505 residential units and 67,398 SF retail
  - 53 single family homes
  - 1 accessory dwelling
- Demolitions**
  - 26 single family homes

SP = Site Plan; FBC = Form Based Code; PDS = Phased Development Site Plan; B-R = By-Right; U-P = Use Permit; U-C = Use Conversion; AD = Accessory Dwelling; EHO = Expanded Housing Option; SF = Square Feet; GFA = Gross Floor Area in Square Feet.

Produced by the Department of Community Planning, Housing and Development (February 2024)

# Arlington's Housing Stock (2024)

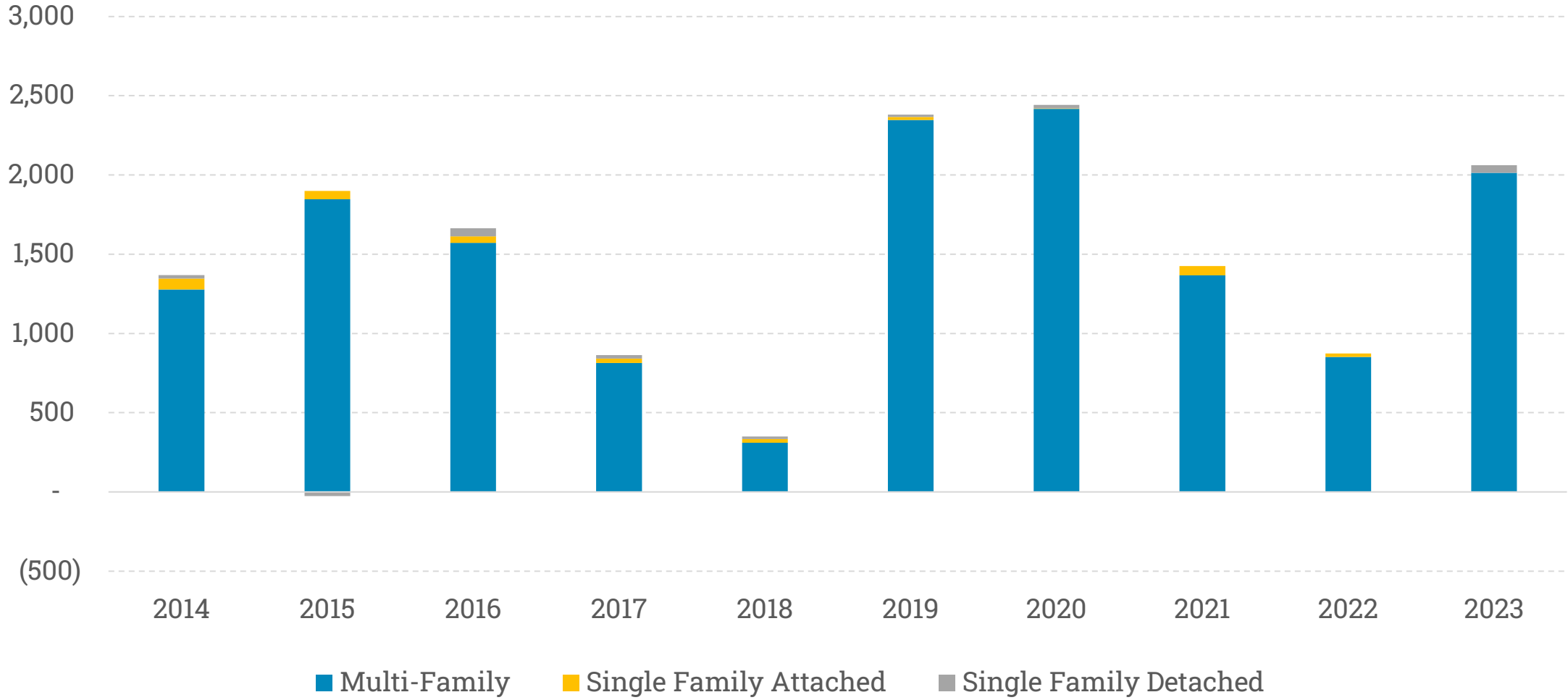
**123,706 Total Units**



Unit Type	Units
<b>Multi-Family</b>	<b>89,095</b>
Apartments	62,836
Condos	26,259
<b>Single Family Attached</b>	<b>7,036</b>
Duplex and Side-by-Side	2,610
Townhouse	4,426
<b>Single Family Detached</b>	<b>27,575</b>
Single Family Detached	27,375
Single Family Detached with Accessory Dwelling	200

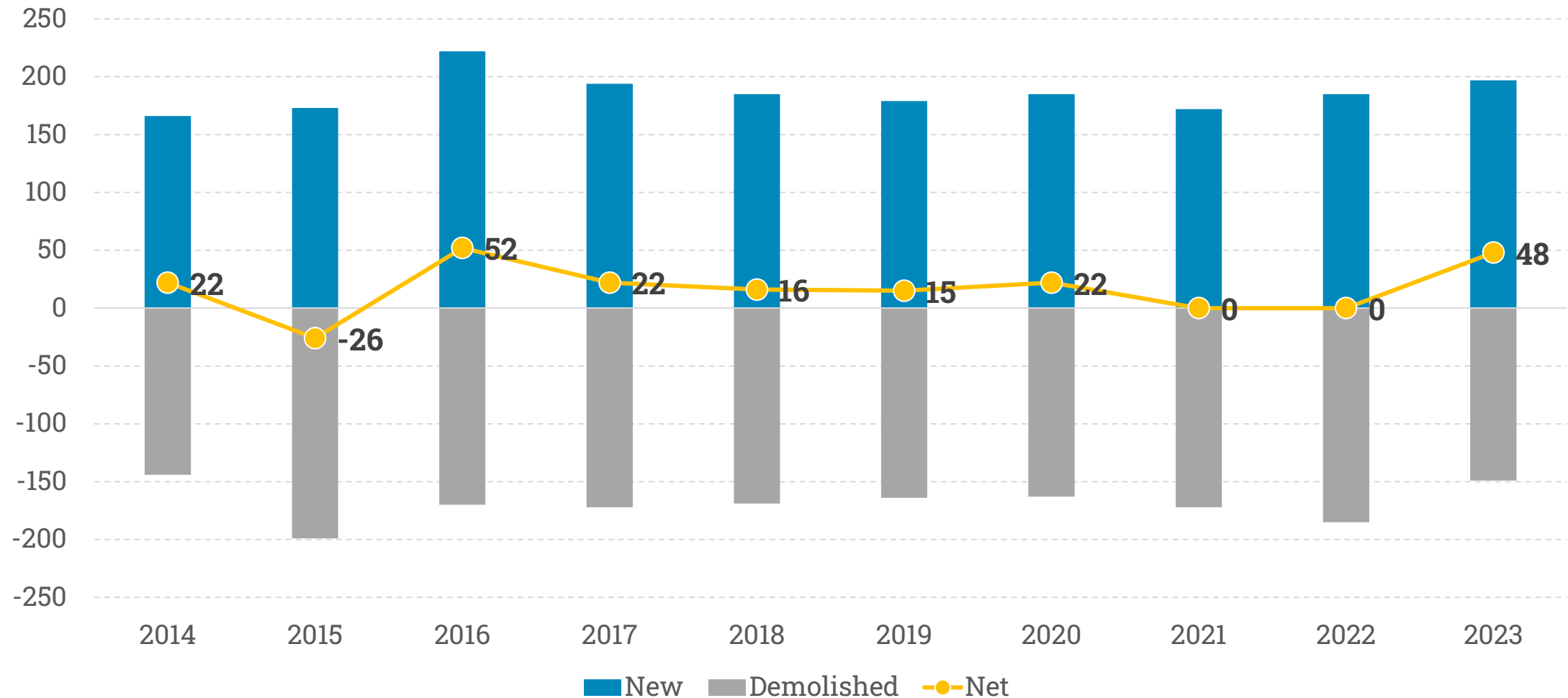
Source: CPHD, Master Housing Unit Database, January 2024.

# Net New Housing Units (2014-2023)



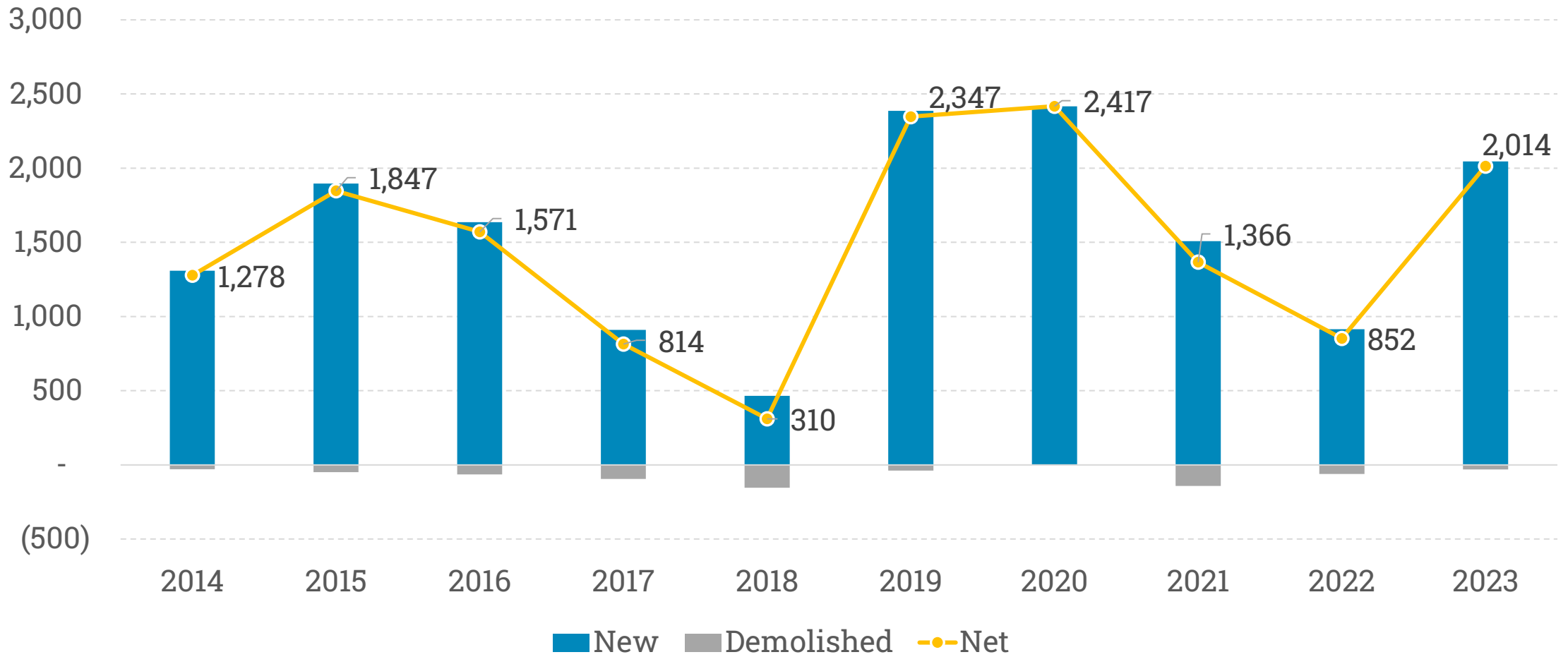
Source: CPHD, Development Tracking as of 4<sup>th</sup> Quarter 2023.

# Net New Housing: Single Family Detached



Source: CPHD, Development Tracking as of 4<sup>th</sup> Quarter 2023.

# Net New Housing: Multi-Family



Source: CPHD, Development Tracking as of 4<sup>th</sup> Quarter 2023.



# Units Currently Under Construction

**3,335 Units  
Under Construction**

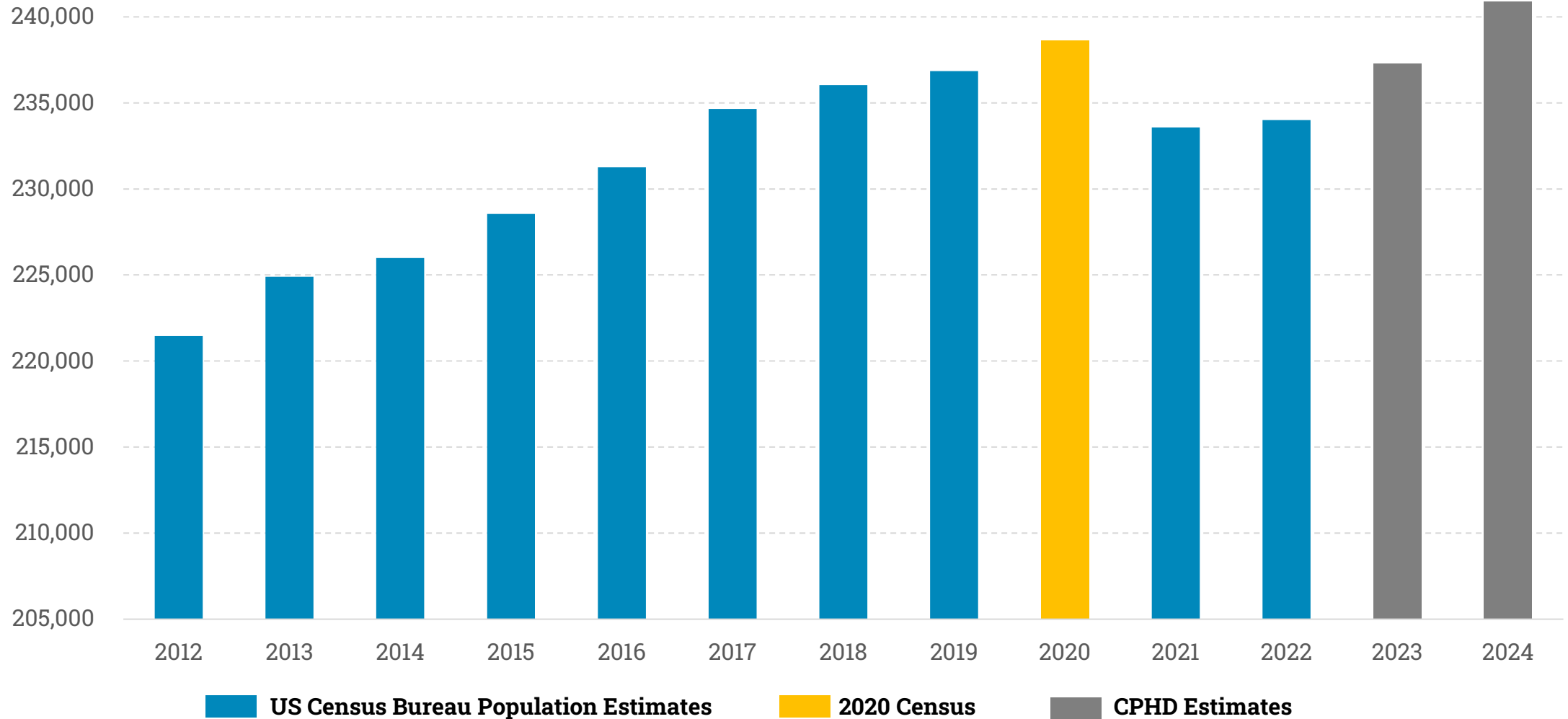
Unit Type	Units
Multi-Family	3,047
Single Family Attached	79
Single Family Detached	167
Accessory Dwelling	42
<b>Total</b>	<b>3,335</b>



Source: CPHD, Development Tracking as of 4<sup>th</sup> Quarter 2023.

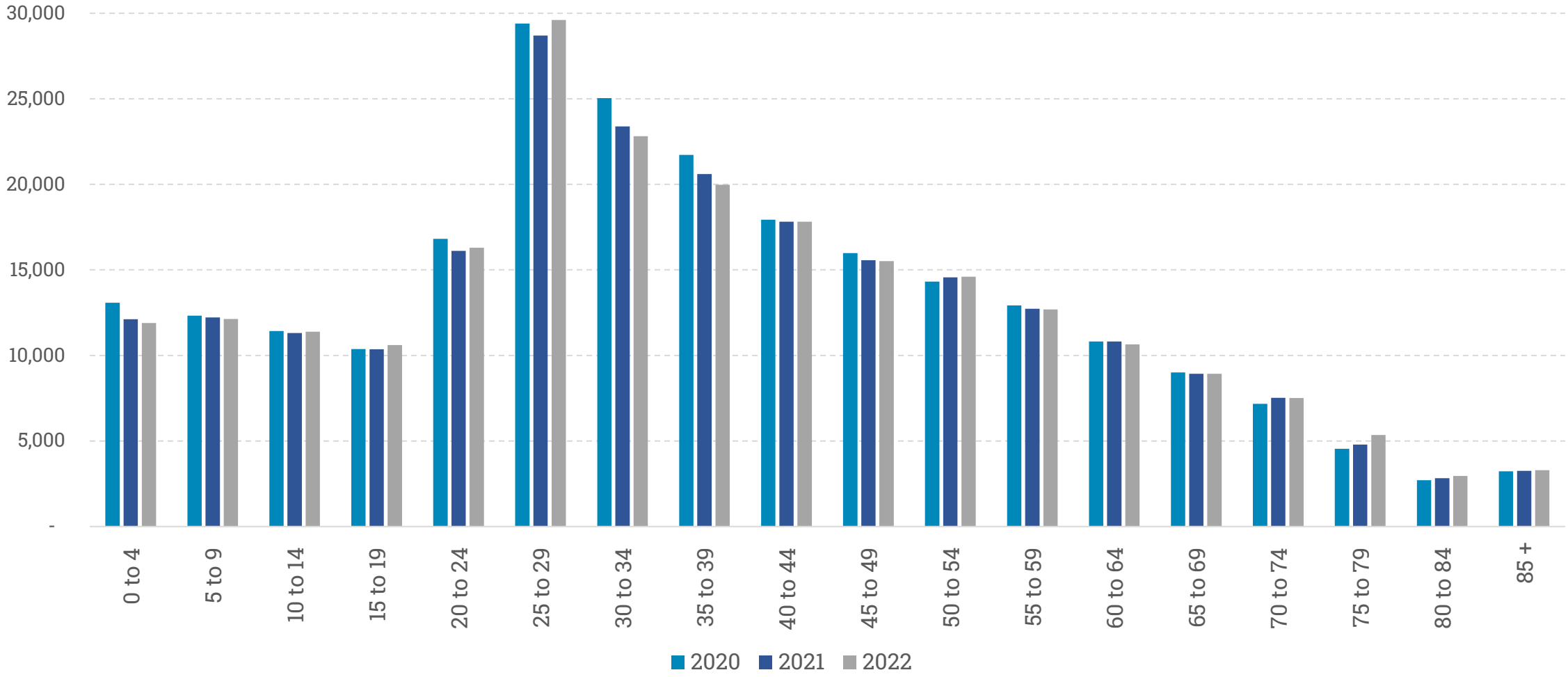
# Population Estimates

# Arlington Population 2012-2024



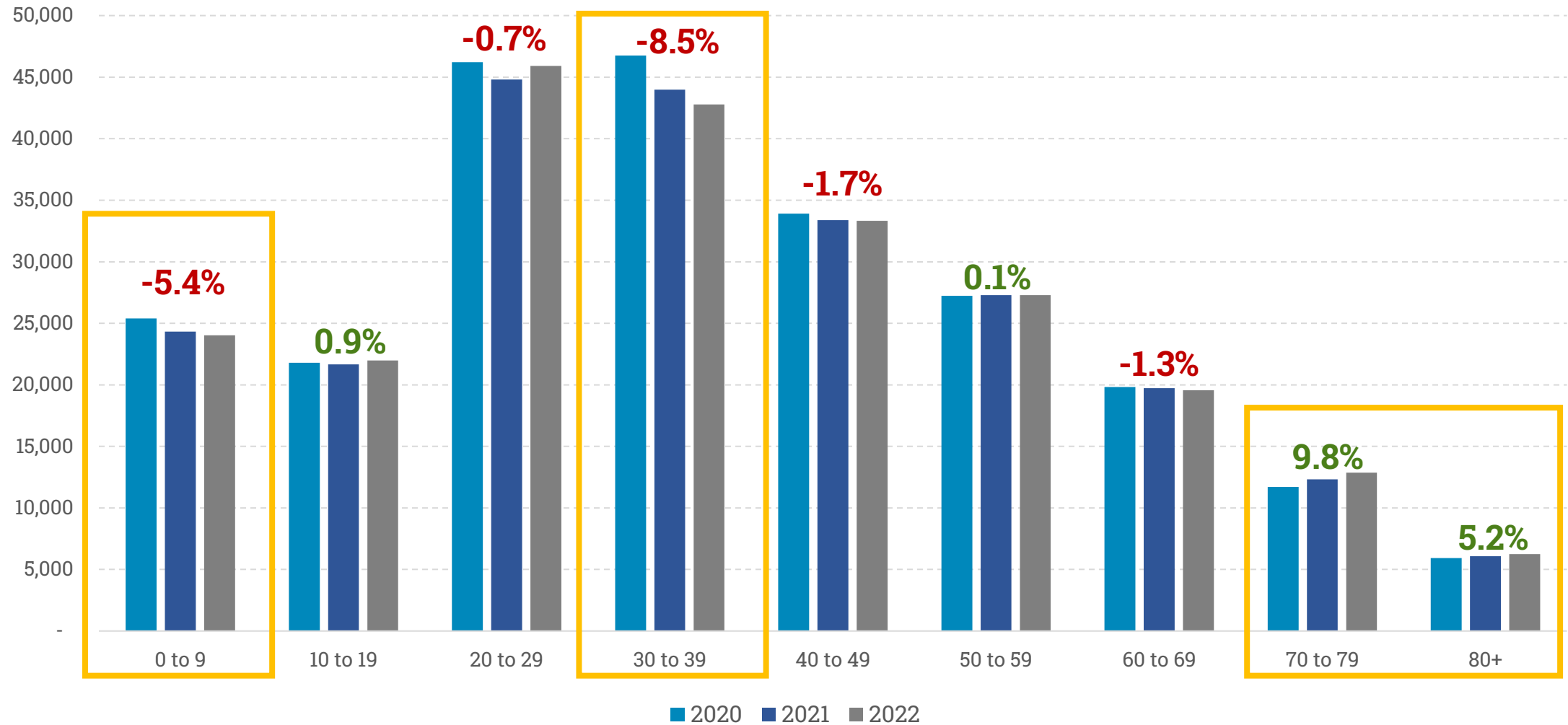
Source: U.S. Census Bureau, Population Estimates Program (Vintages 2019 and 2022), 2020 Decennial Census, and CPHD Population Estimates.

# Population: 2020-2022



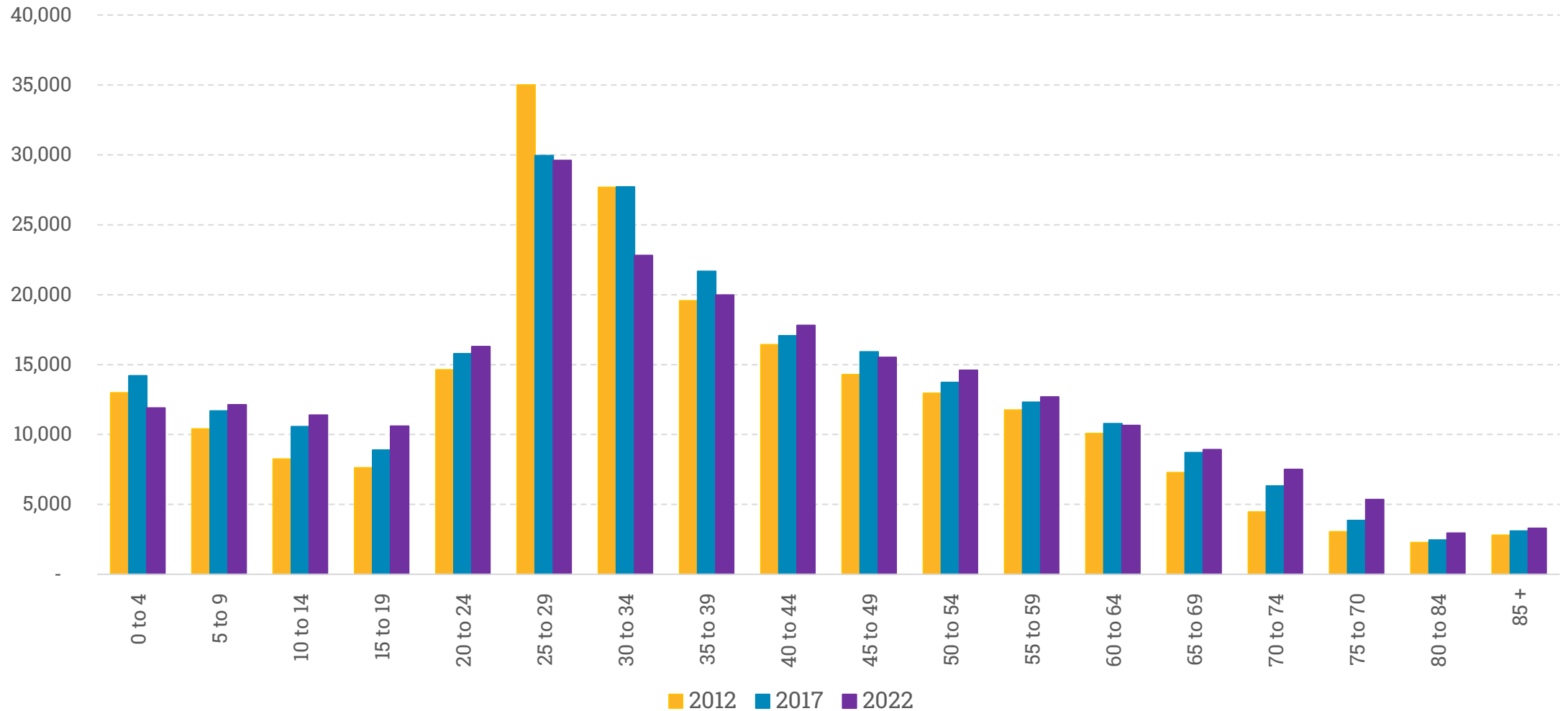
Source: U.S. Census Bureau, Population Estimates Program (Vintage 2022)

# Population: 2020-2022



Source: U.S. Census Bureau, Population Estimates Program (Vintage 2022)

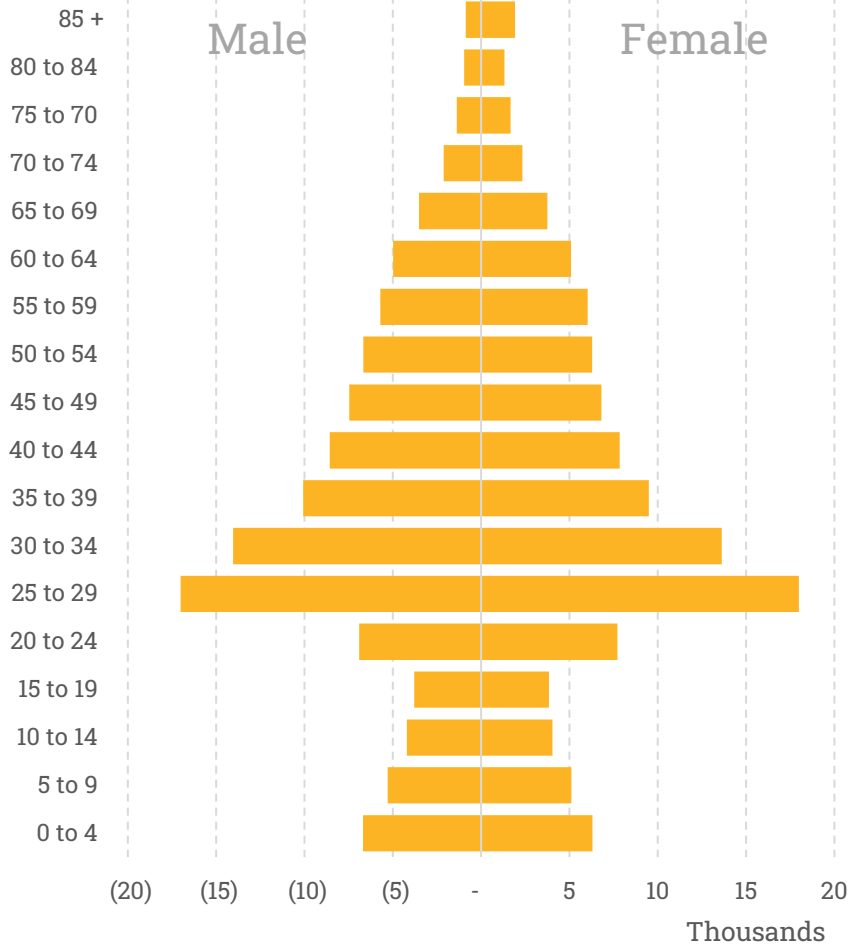
# Age Distribution (2012, 2017, and 2022)



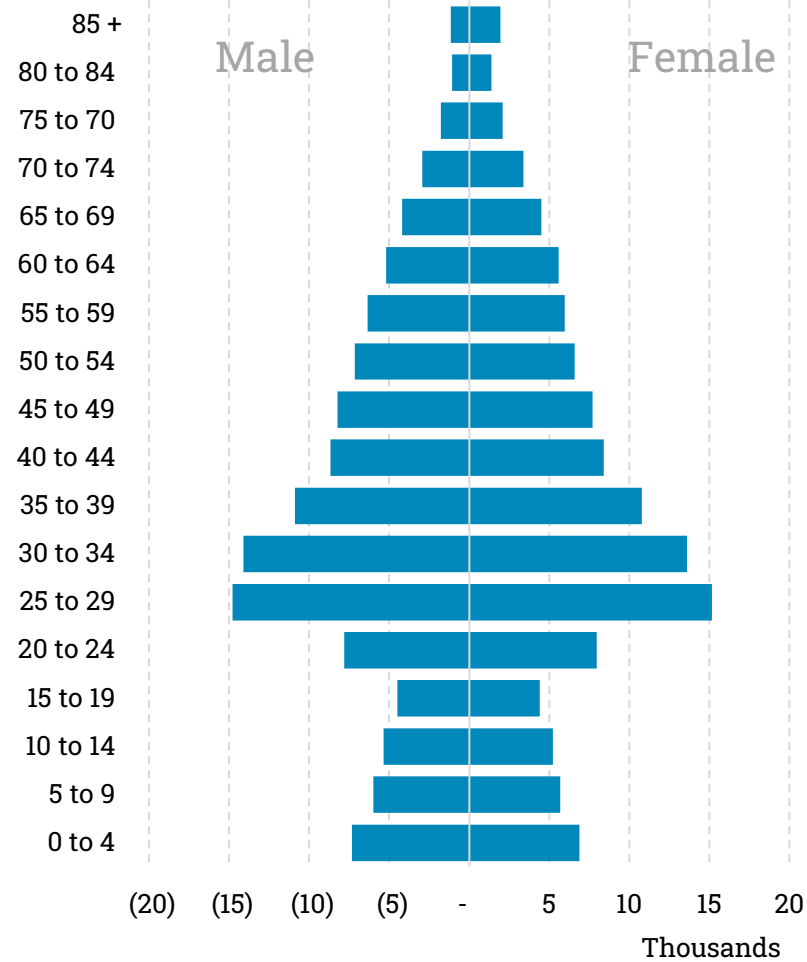
Source: U.S. Census Bureau, Population Estimates Program (Vintage 2019 and 2022)

# Age-Sex Pyramid

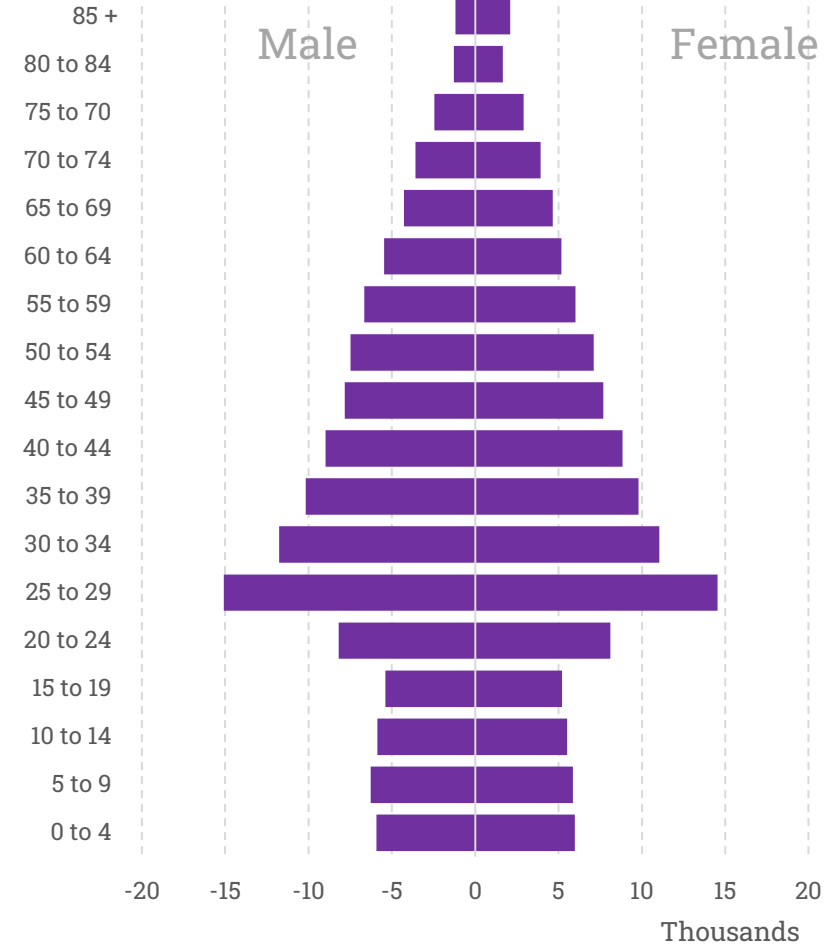
2012



2017

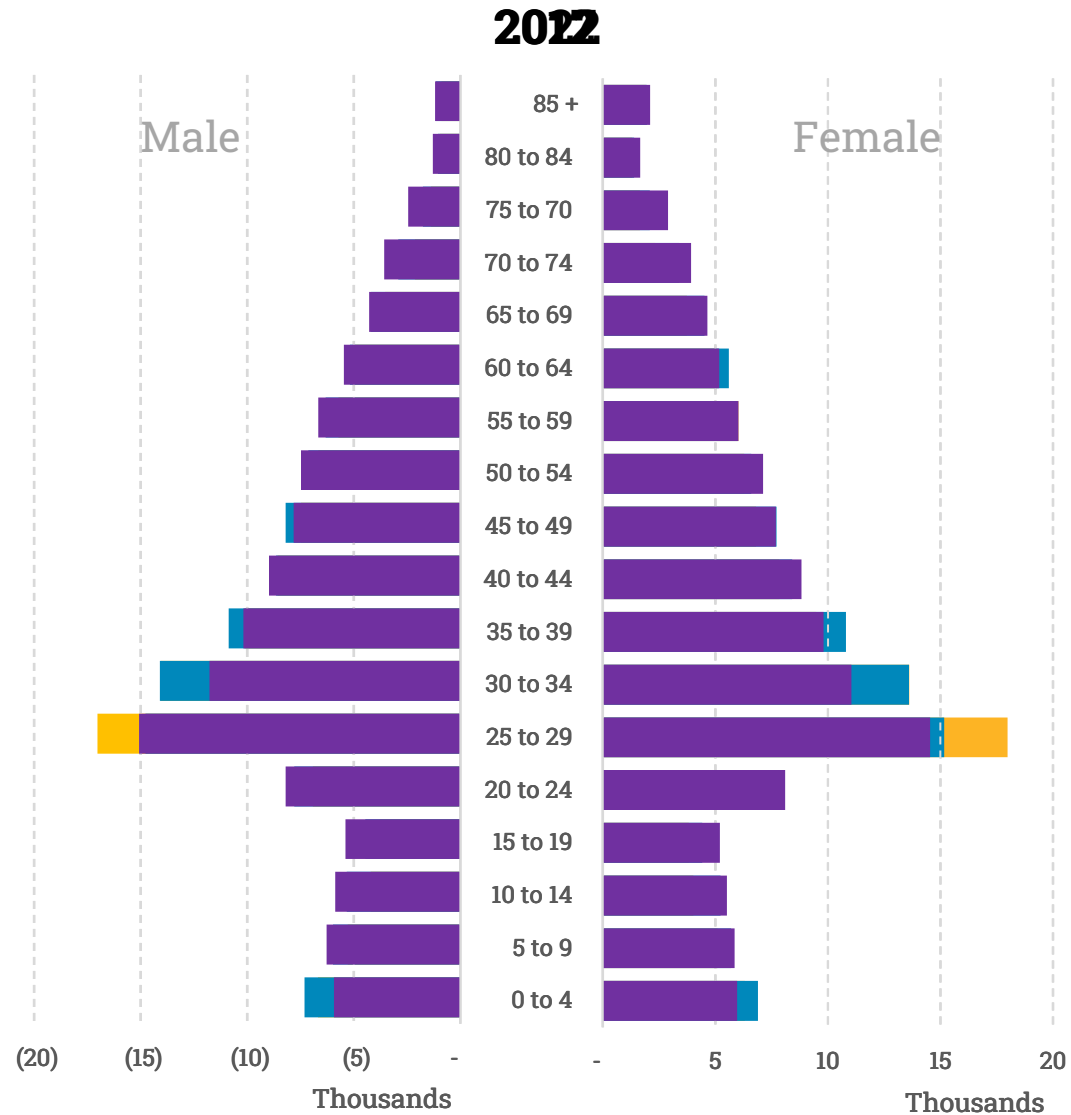


2022



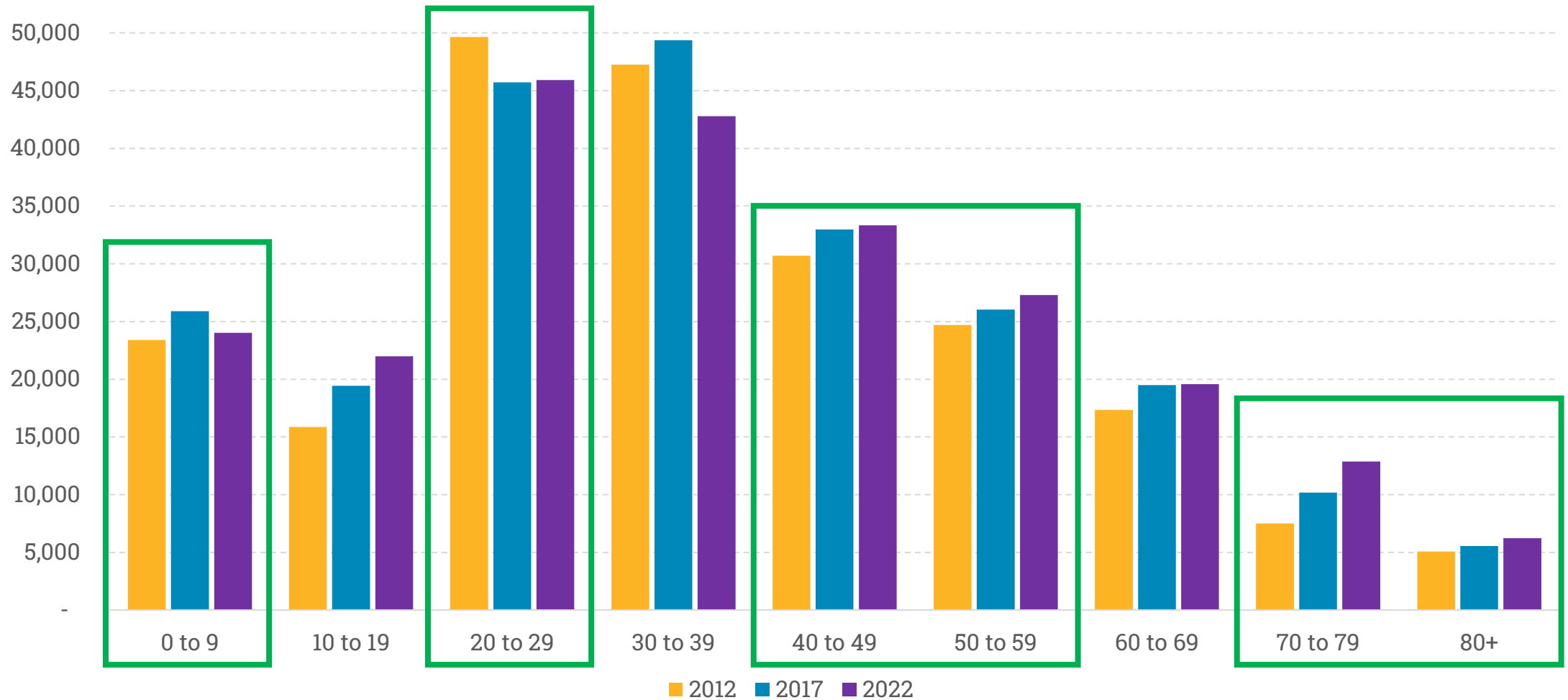
Source: U.S. Census Bureau, Population Estimates Program (Vintage 2019 and 2022)

# Age-Sex Pyramid Overlay



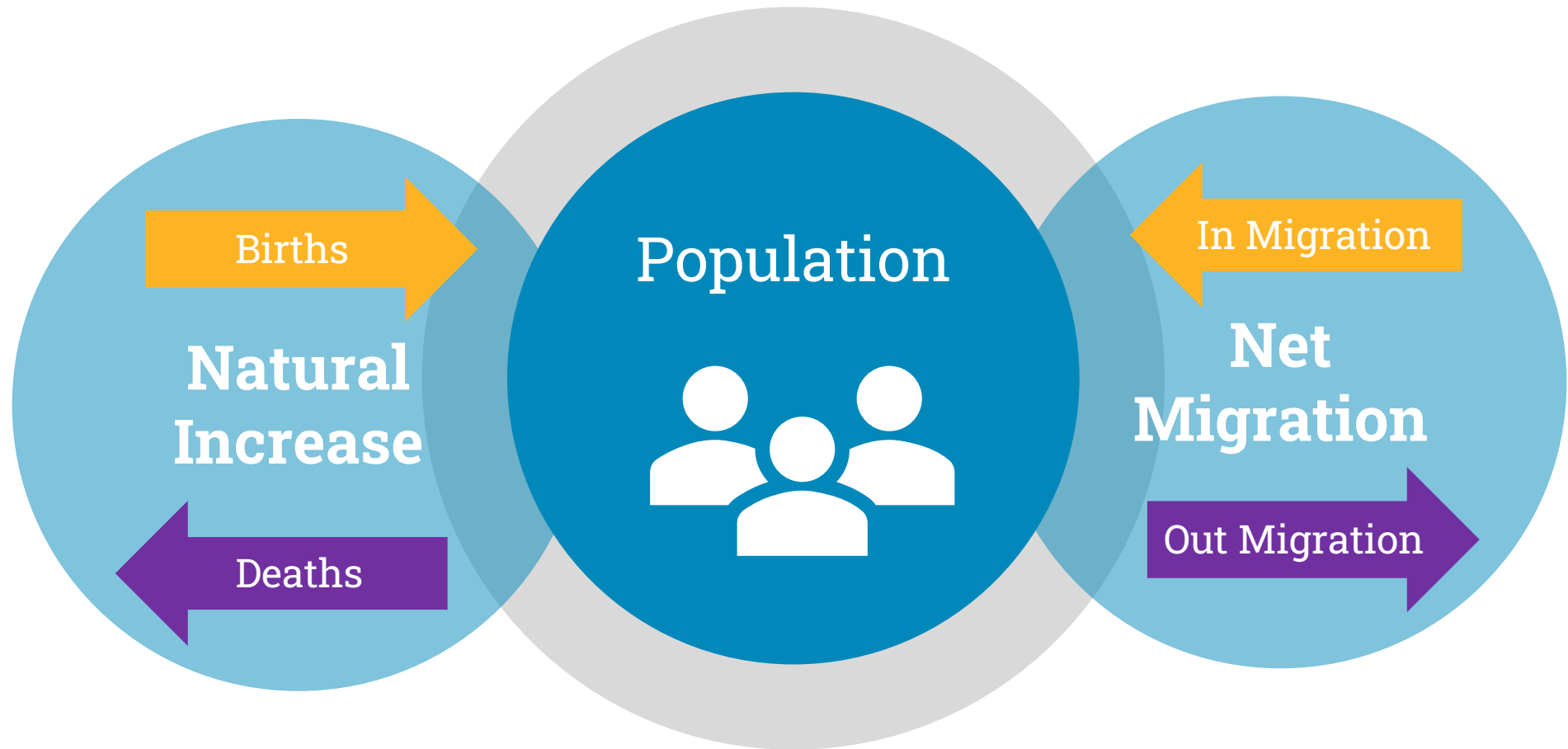


# Age Distribution (2012, 2017, and 2022)



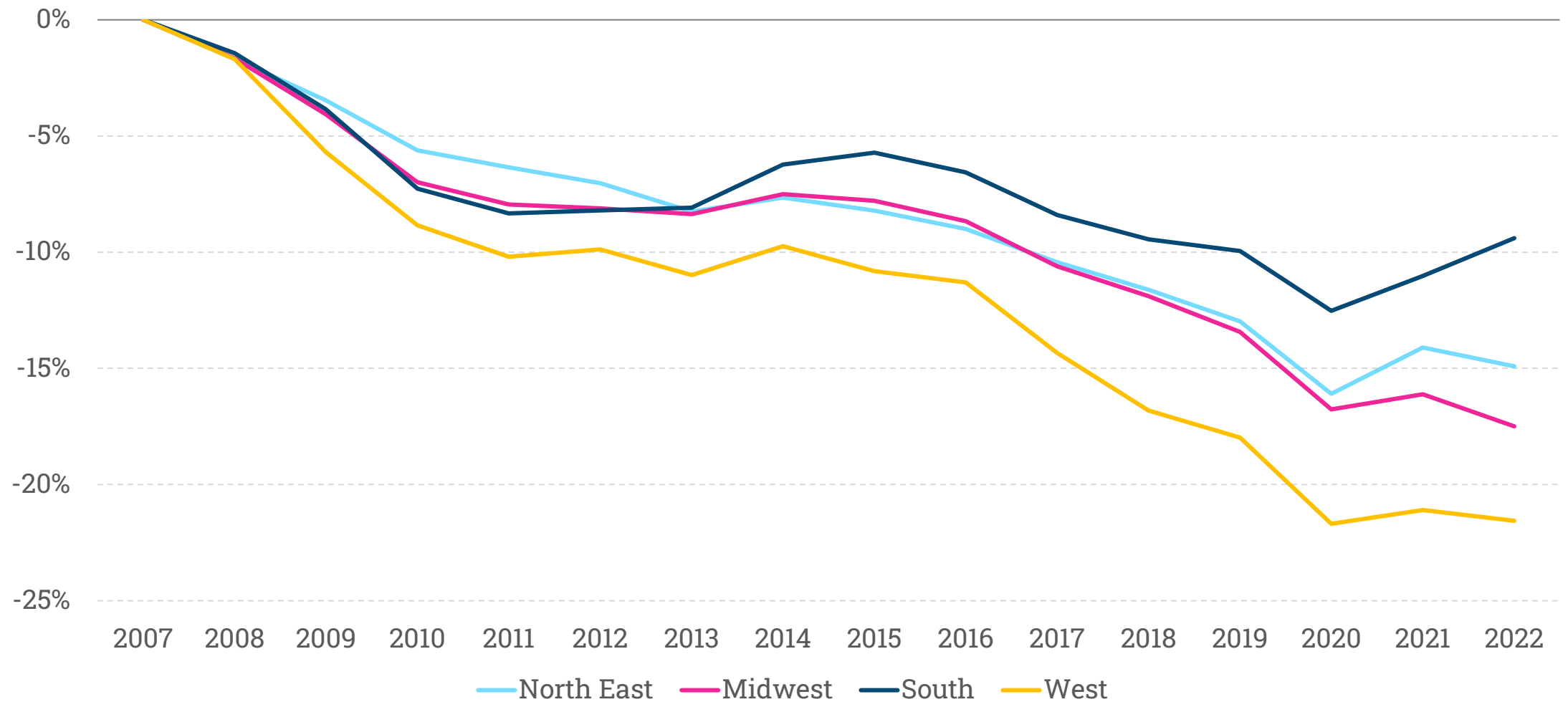
Source: U.S. Census Bureau, Population Estimates Program (Vintages 2019 and 2022)

# Components of Change



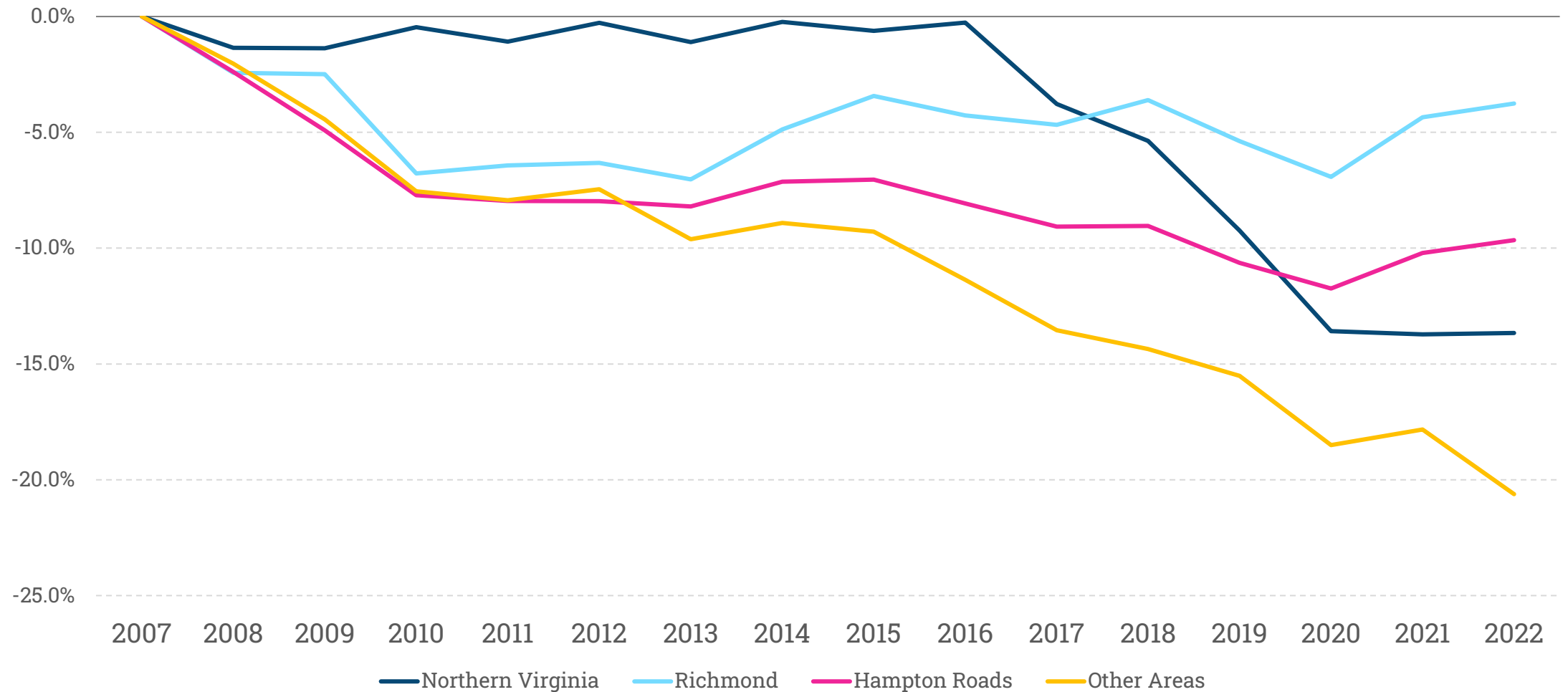
# Births

# National Change in Births since 2007



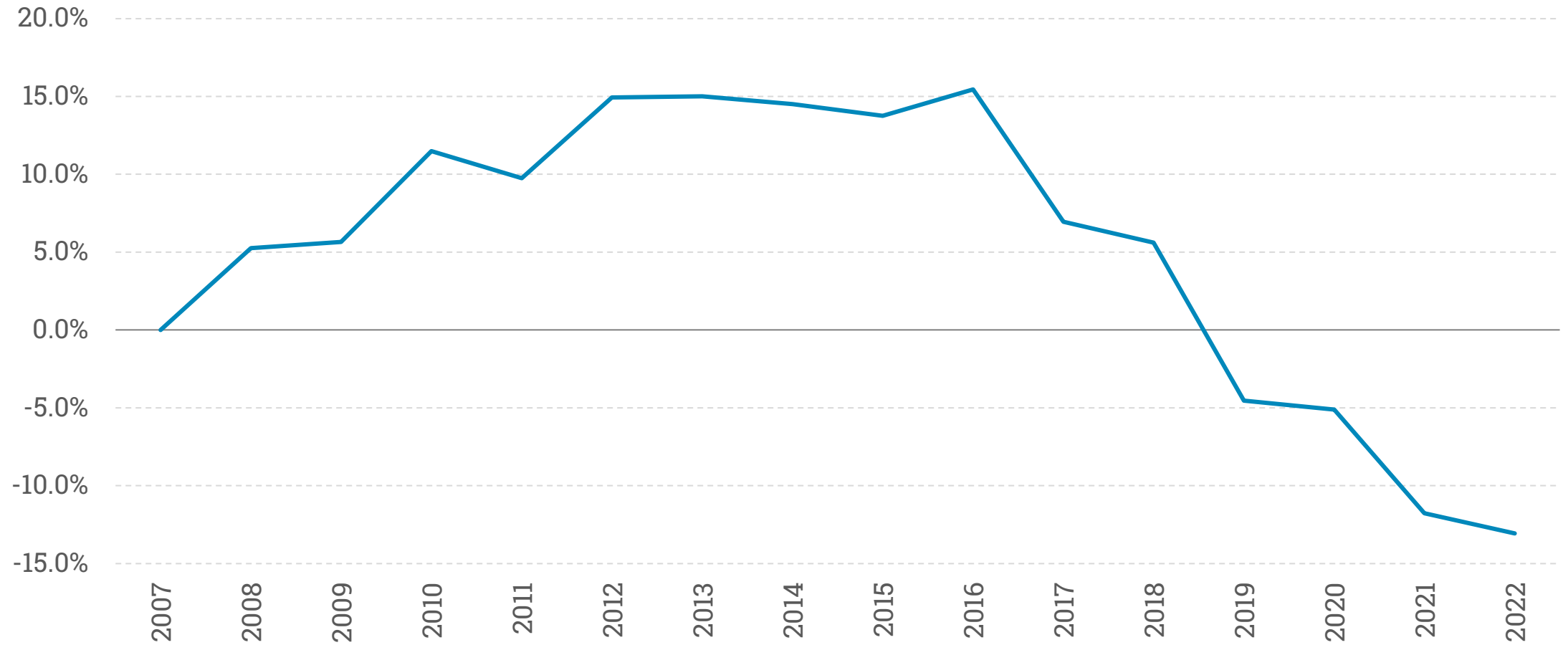
Source: Center for Disease Control and Prevention, National Vital Statistics System, 2007-2022.

# Virginia Change in Births since 2007



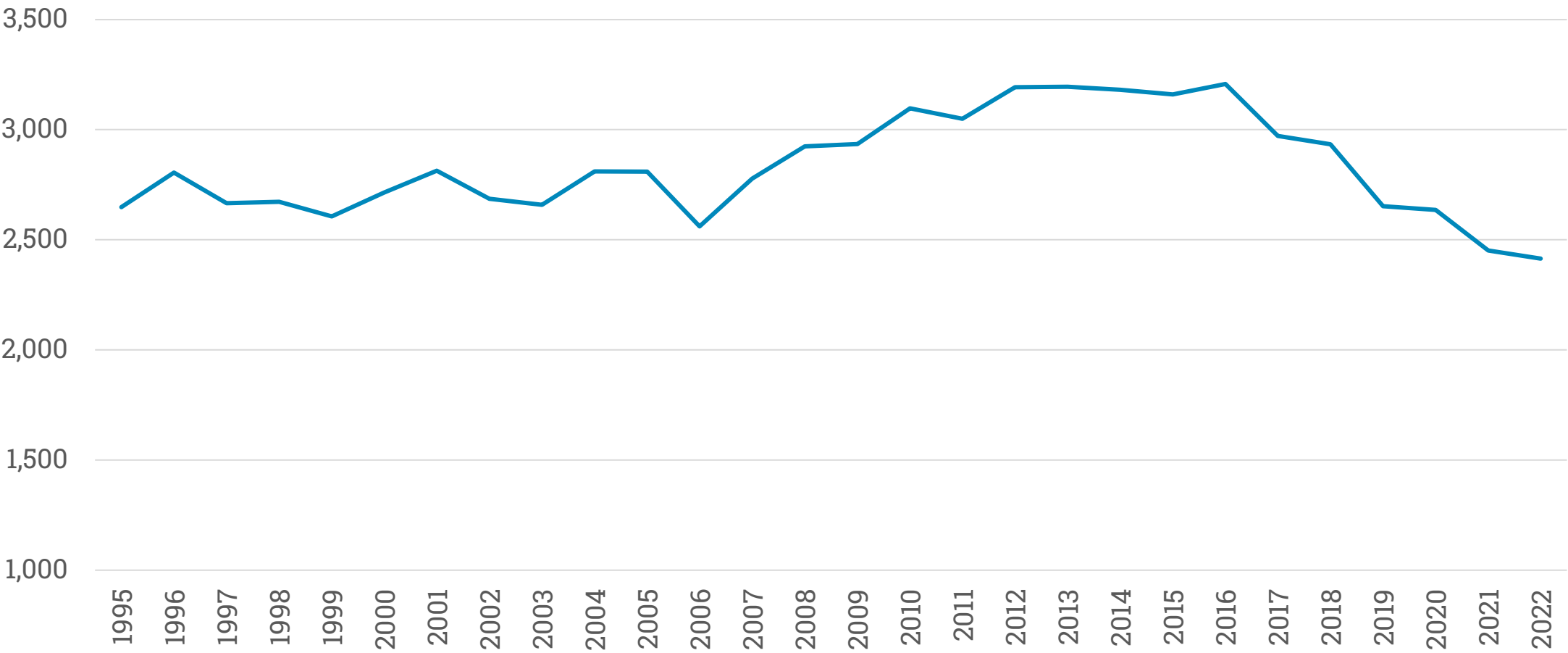
Source: Center for Disease Control and Prevention, National Vital Statistics System, 2007-2022.

# Arlington Change in Births since 2007



Source: Virginia Department of Health, 2007-2022.

# Births to Arlington Residents



Source: Virginia Department of Health, 1995-2022.

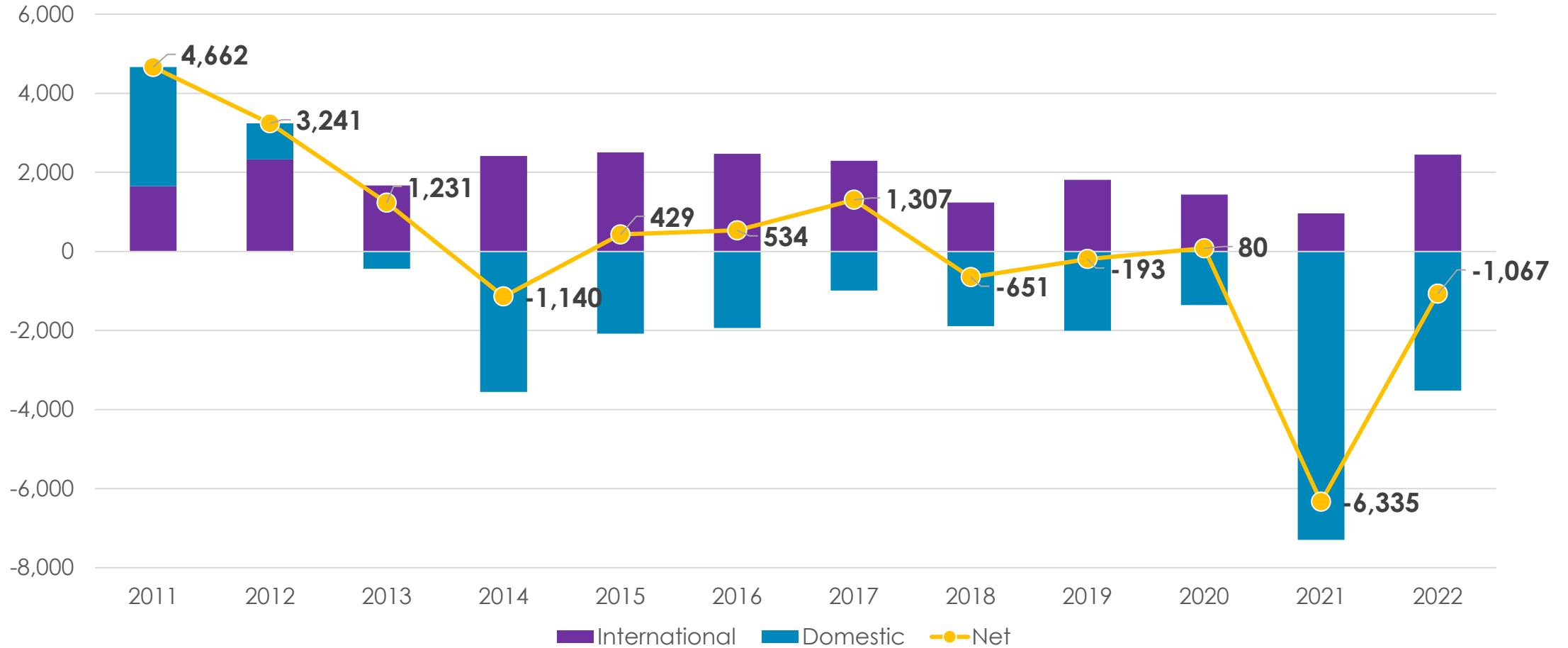
# Deaths

- Prior to 2020, deaths averaged around 900 per year.
- In 2021 and 2022, deaths increased to around 1,200 per year.
  - Covid-19 Virus
  - Increase in senior population.



# Migration

# Migration



Source: U.S. Census Bureau, Population Estimates Program (Vintage 2019 and 2022)

# Where did Arlingtonians move?

## Top 20 Destinations

			2018-2019	2019-2020	2020-2021
1	Fairfax County	VA	1	1	1
2	District of Columbia	DC	2	2	2
3	Alexandria City	VA	3	3	3
4	Montgomery County	MD	4	4	4
5	Loudoun County	VA	5	5	5
6	Prince William County	VA	6	6	6
7	Prince George's County	MD	7	7	7
8	New York County	NY	8	11	10
9	Los Angeles County	CA	9	8	13
10	Cook County	IL	10	9	9
11	Falls Church City	VA	11	10	11
12	King County	WA	12	12	15
13	San Diego County	CA	13	15	14
14	<b>Anne Arundel County</b>	<b>MD</b>	<b>14</b>	<b>13</b>	<b>8</b>
15	<b>Richmond City</b>	<b>VA</b>	<b>15</b>	<b>14</b>	<b>12</b>
16	Philadelphia County	PA	16	19	17
17	Denver County	CO	17	17	18
18	Travis County	TX	18	18	16
19	Middlesex County*	MA	19	24	23
20	San Francisco County*	CA	20	45	54

### New in 2020:

- #16 – Baltimore City (MD)
- #20 – Wake County (NC)

### New in 2021:

- #19 – Wake County (NC)
- #20 – Mecklenburg County (NC)

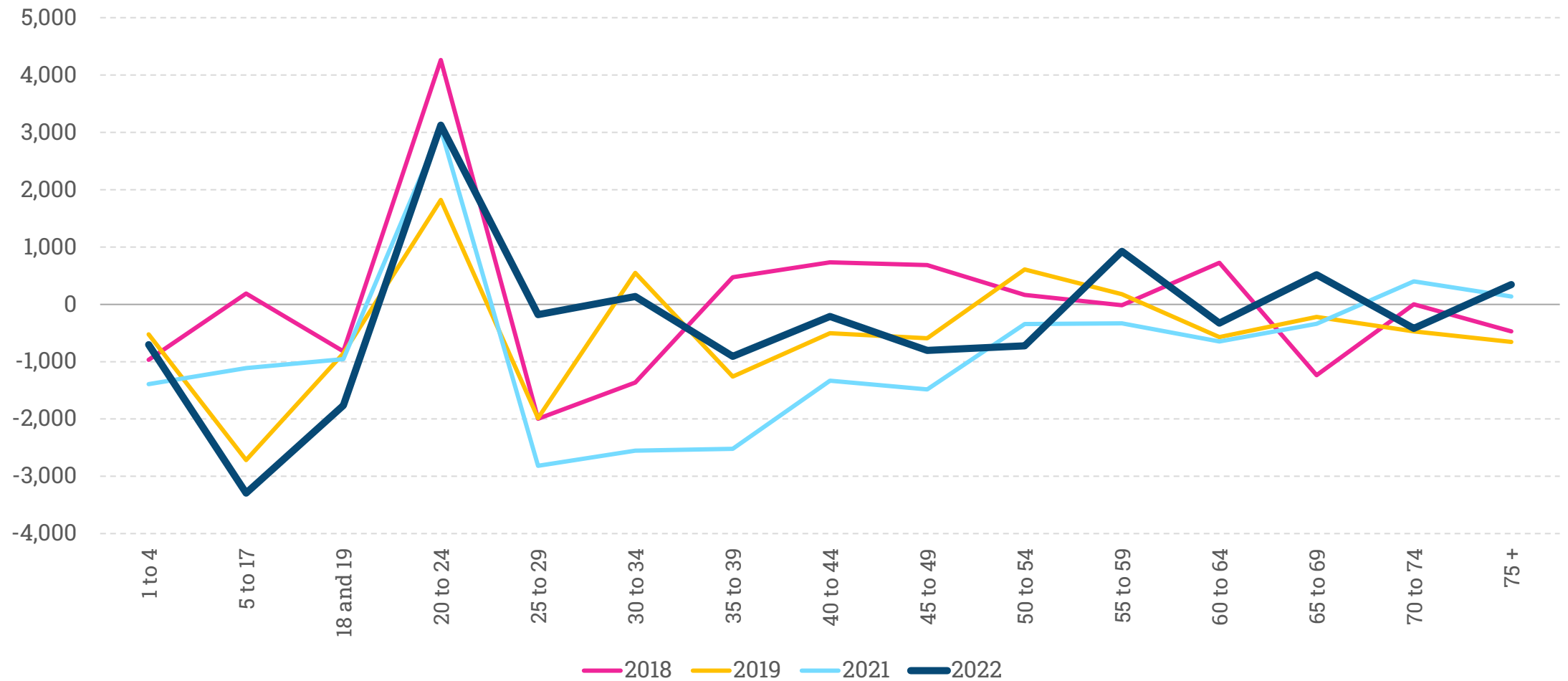
\* Fell from top 20.

Source: Internal Revenue Service,  
Migration Data 2019-2021.

**Who is moving out?**

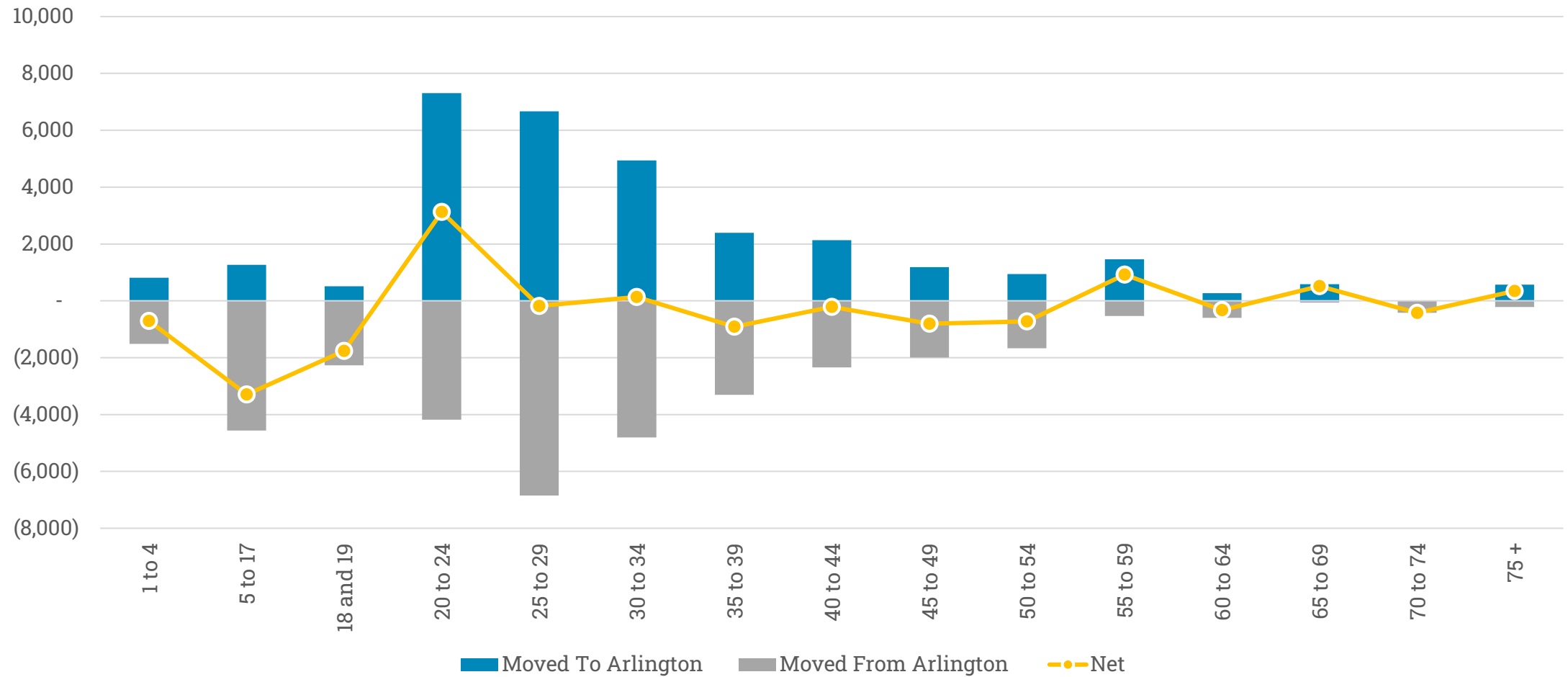
**Who is moving in?**

# Net Movement by Age



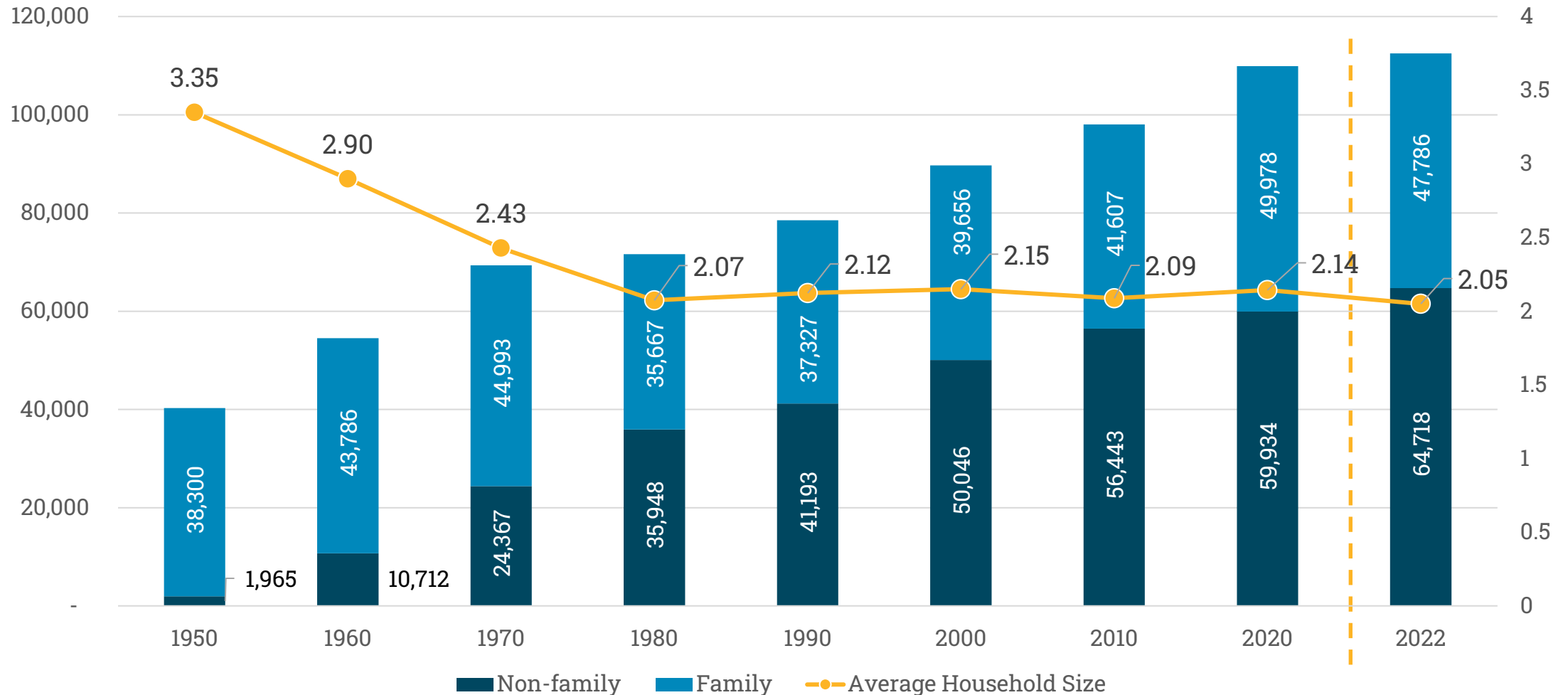
Source: U.S. Census Bureau, 2018-2022 American Community Survey 1-Year Estimates.

# 2022 Migration by Age



Source: U.S. Census Bureau, 2022 American Community Survey 1-Year Estimates.

# Household Type and Size (1950 - 2022)



Source: U.S. Census Bureau Decennial Census 1950-2020 and 1-YR American Community Survey 2022.

# Key Takeaways:

- Housing stock is growing, with the majority of units in multi-family developments.
- In 2021, resulting from the pandemic, a higher-than-average number of young professionals and families moved from Arlington.
- 2022 estimates show that young professionals are returning, but most likely with a different household structure compared to those that moved out.
- Average household sizes continue to decline.
- The U.S. Census Bureau is scheduled to release the 2023 County and City Populations Estimates in March 2024 and the age and race data in June 2024.



# Questions?

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