Demographic Update

Population Estimates, Births, and Forecast

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CPHD: Research and Strategic Initiative Group

Joint Facilities Advisory Commission
February 22, 2023

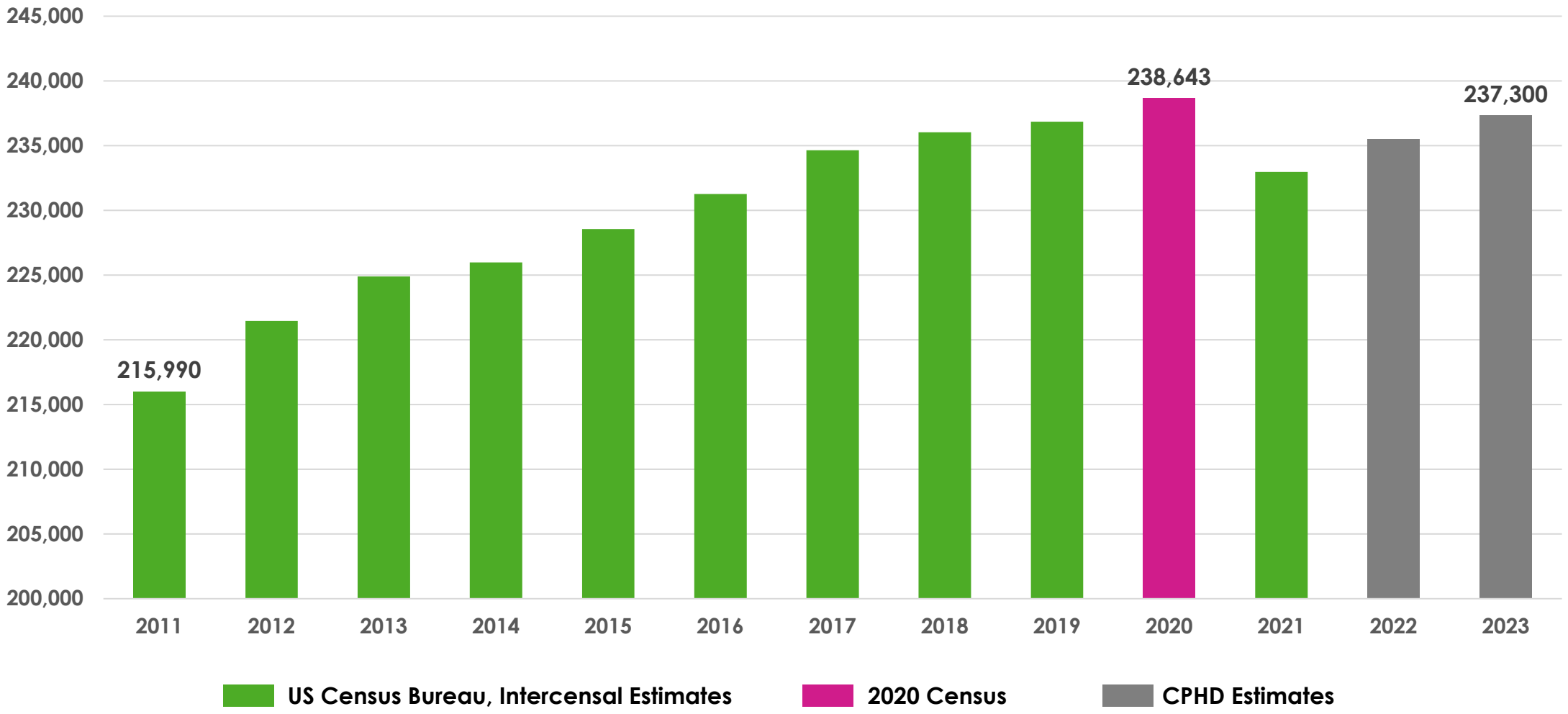
ARLINGTON
VIRGINIA

Agenda

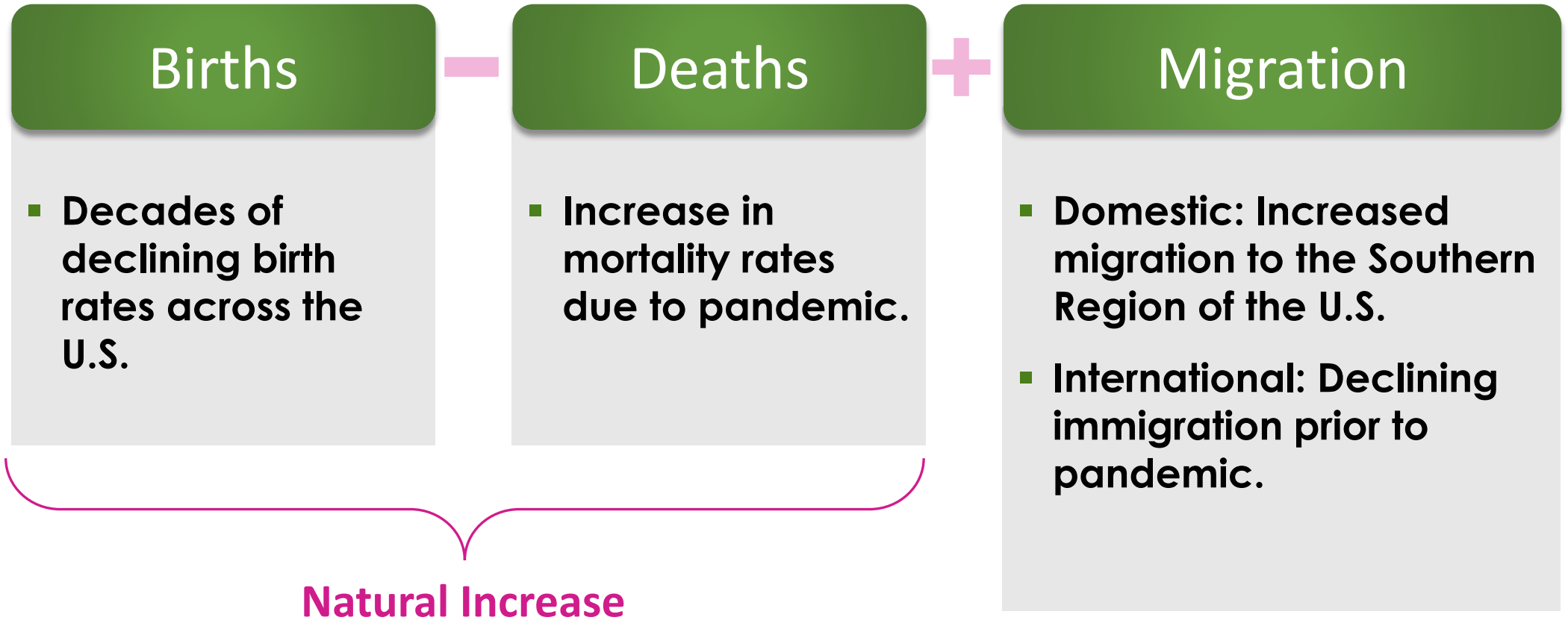
- Population Estimates
  - Components of Change
  - Migration
  - Age
- Birth Projections
- Forecast Round 10.0
- Arlington Housing Trends

Population Estimates

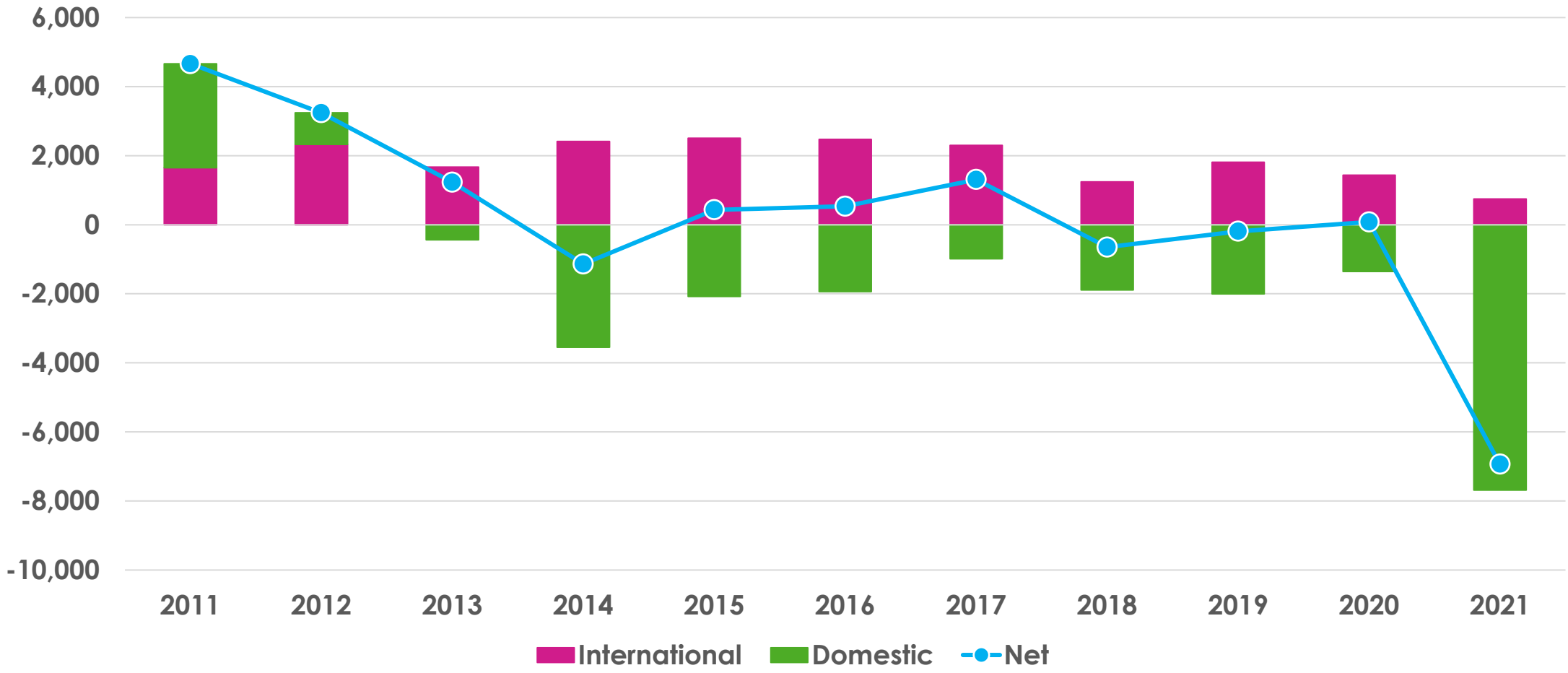
Arlington Population 2011-2023



Components of Change

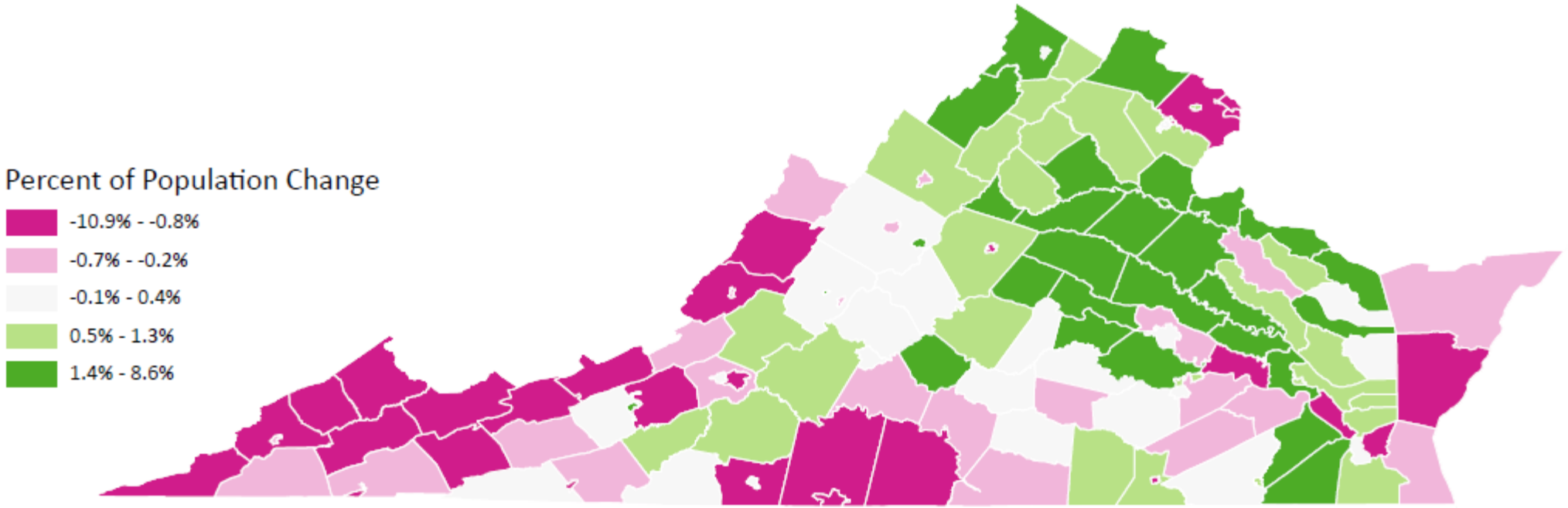


Arlington Migration 2011-2021



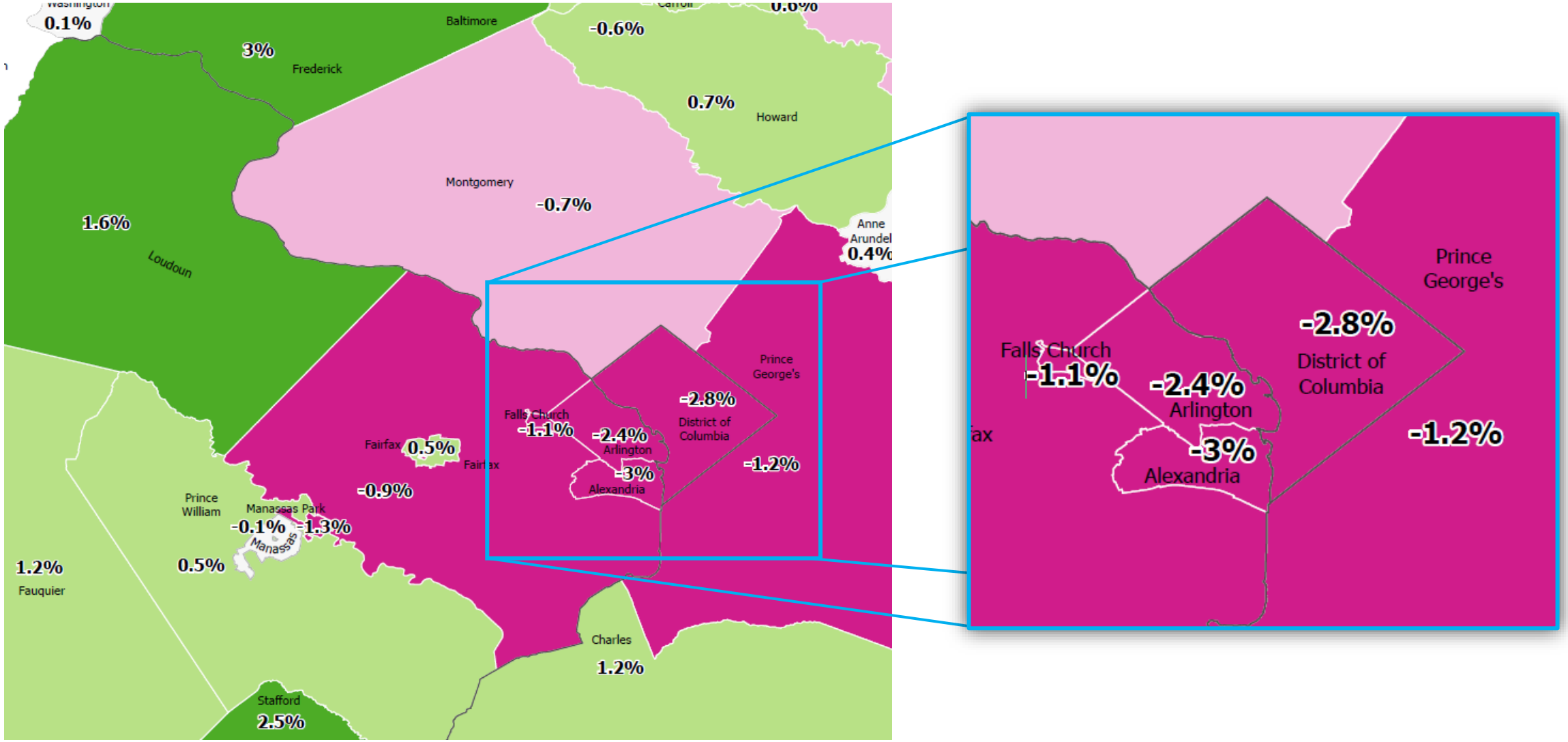
Source: US Census Bureau, Intercensal Estimates

Population Change April 2020 to July 2021



Source: US Census Bureau, Population Estimates Program 2021

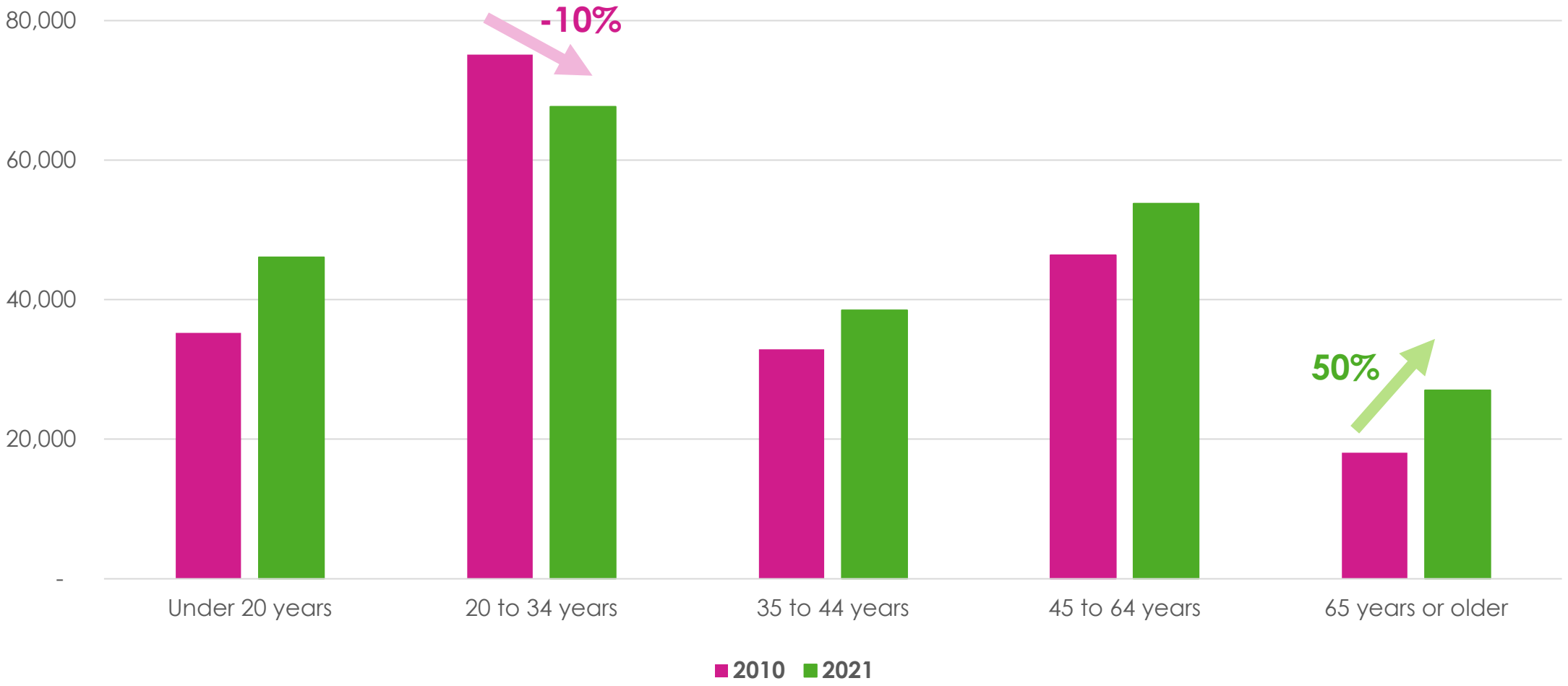
Population Change April 2020 to July 2021



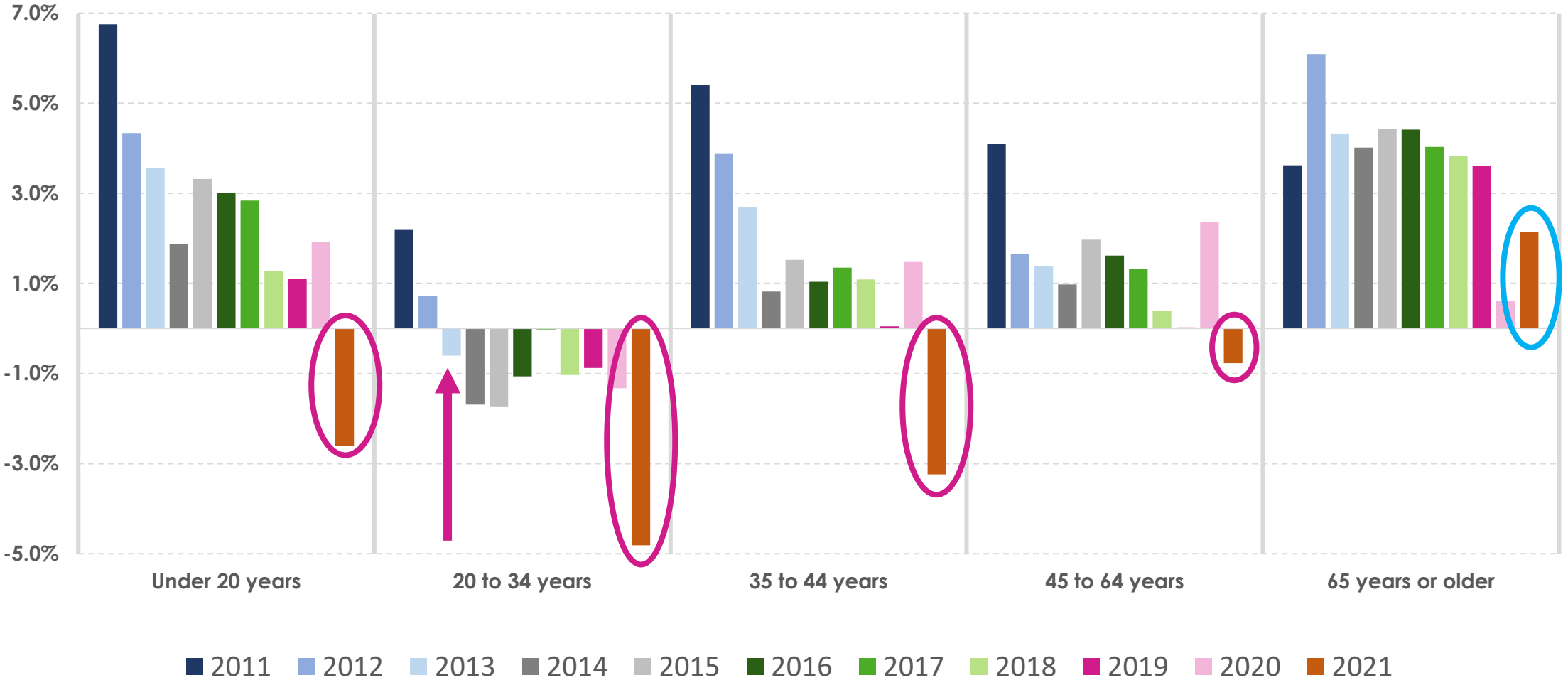
Source: US Census Bureau, Population Estimates Program 2021

Population Estimates By Age

Population by Age Cohorts: 2010 and 2021



Annual Population Change by Age

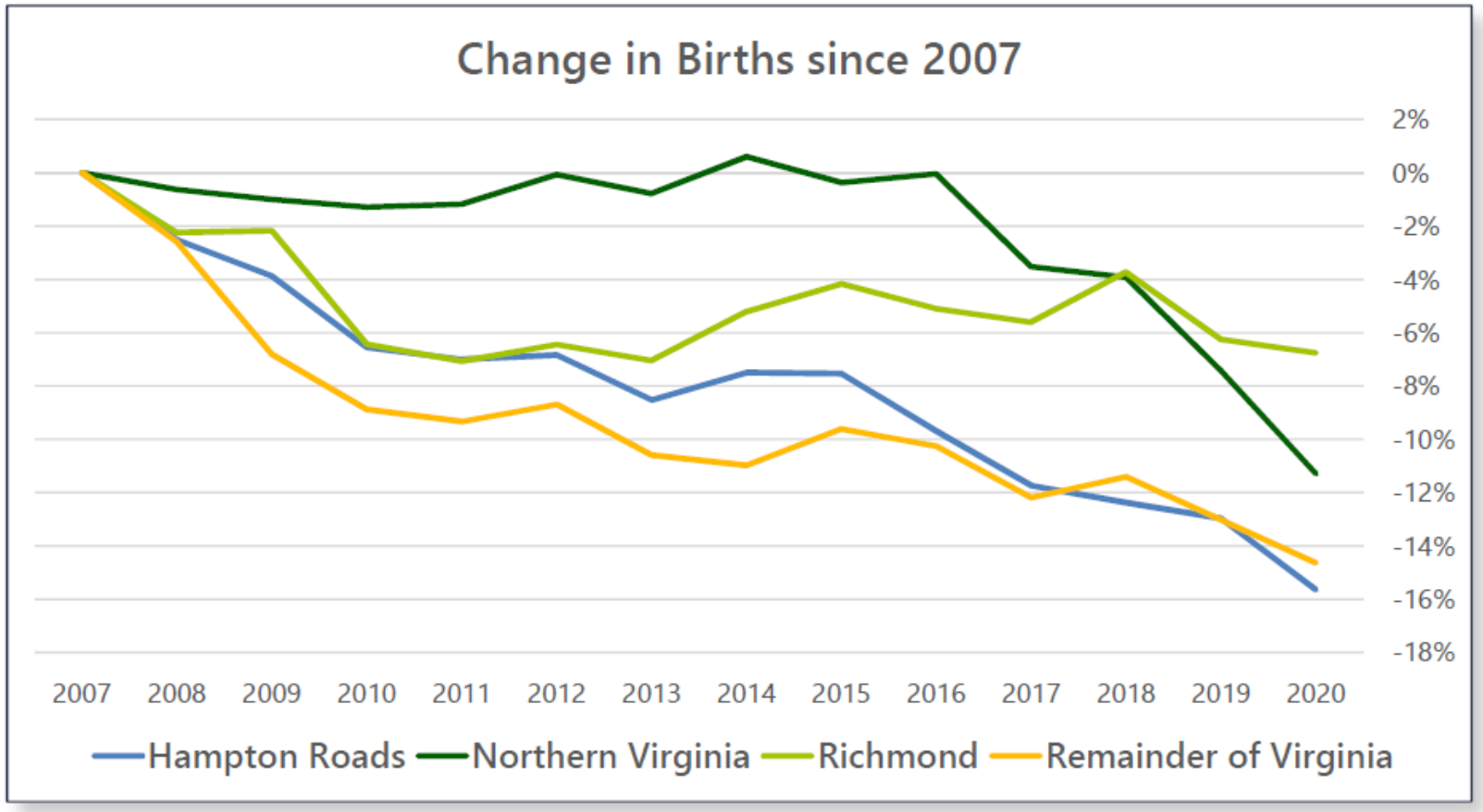


Birth Trends and Projections

Births Rates

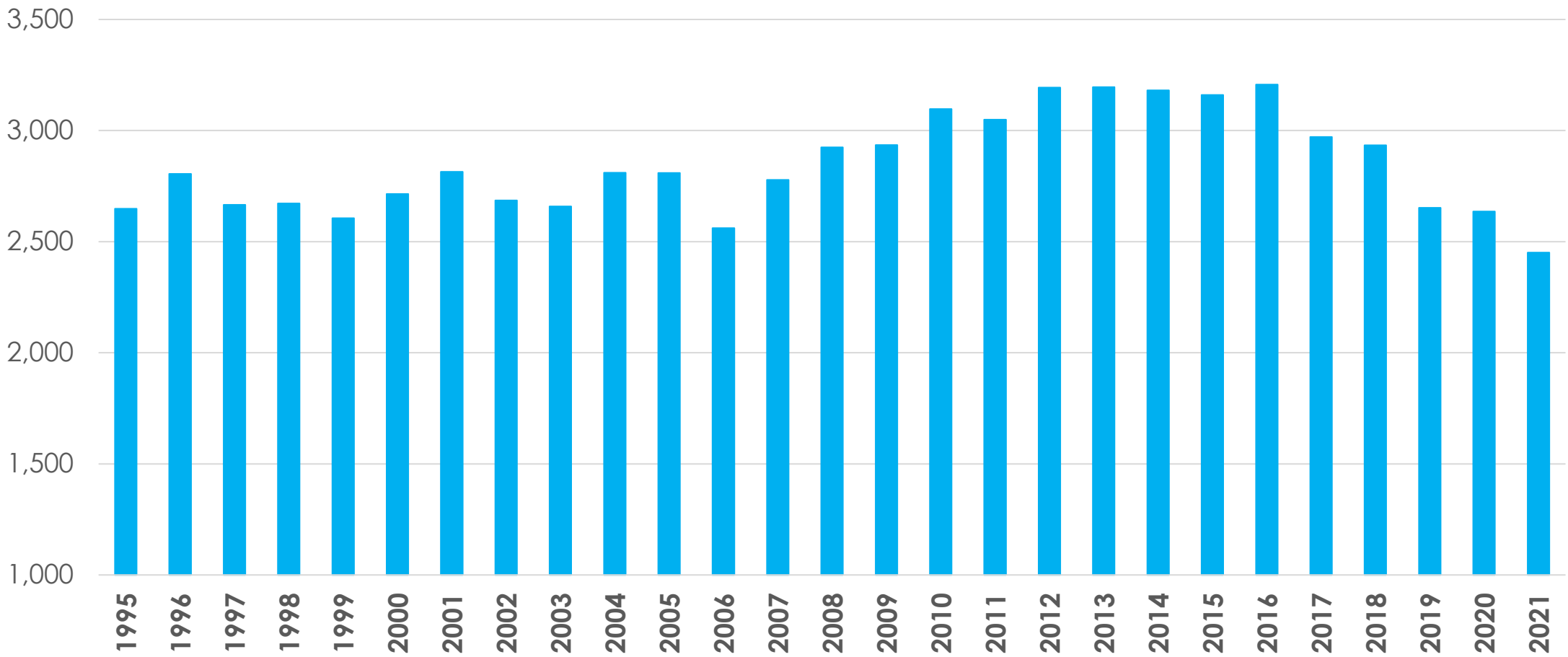
- Between 2007 and 2020, the Total Fertility Rate (TFR) in the United States declined from 2.12 to 1.64.
  - Women are having first child later in life.
  - Women having overall fewer children.
- Since 1990 fertility rates have fallen among all major race/ethnic groups.

Change in Births: Virginia



Source: UVA Weldon Cooper Center

Births to Arlington Residents



Source: Virginia Department of Health

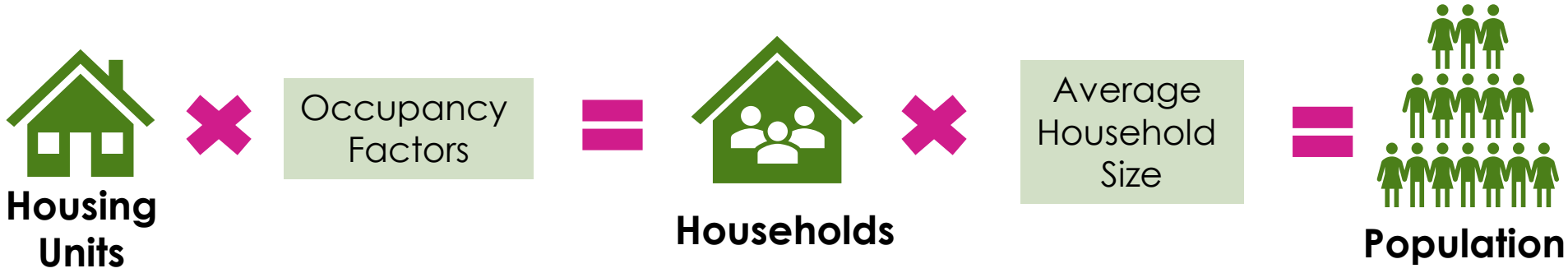
Birth Projections

- Model built by RLS Demographics
  - Census Population Base
  - Rate Tables:
    - Survival
    - Migration
    - Fertility
- Model is calibrated with Crude Migration Rates and Total Fertility rates to meet two thresholds:
  1. Actual births
  2. Forecast Population

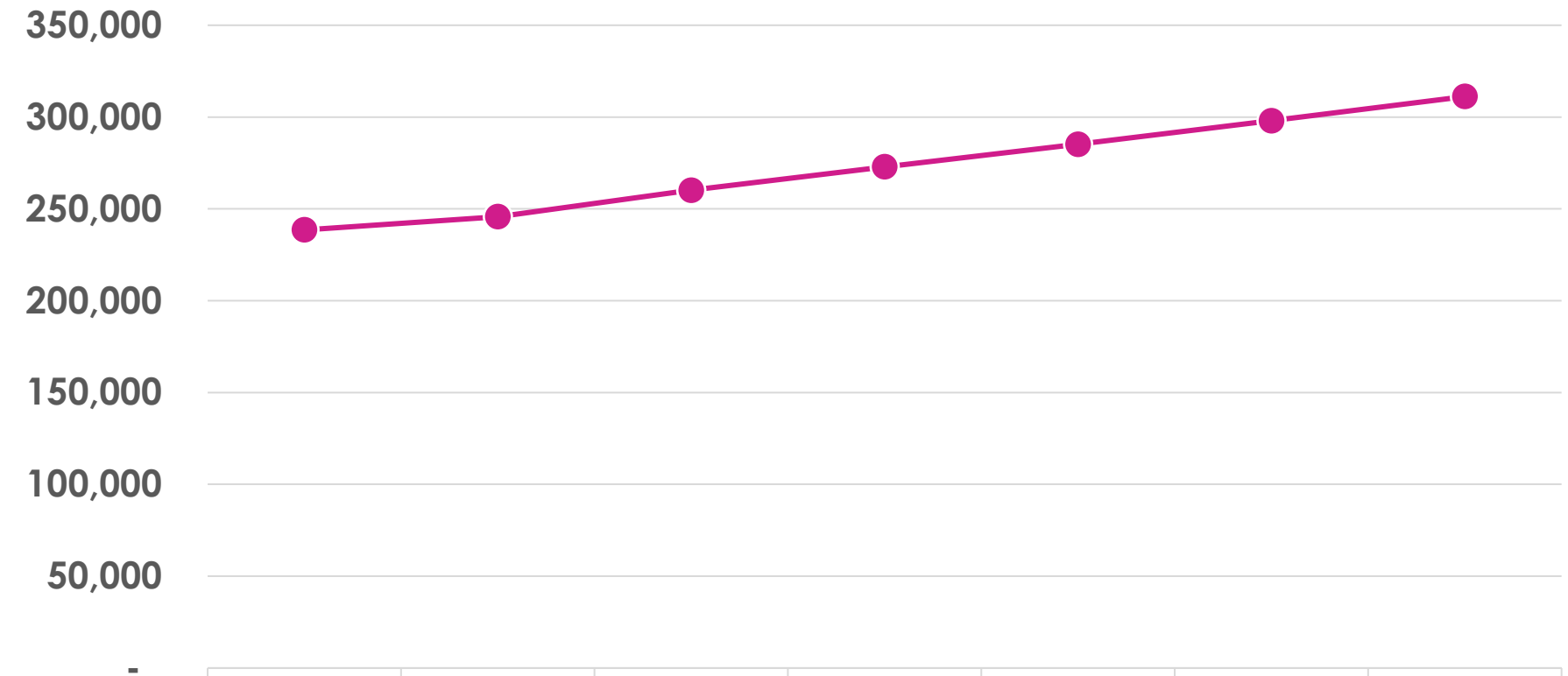
Forecast Round 10.0

Forecast Round 10.0

- Prepared in Fall 2022 for participation in the **MWCOG regional cooperative forecasting** process.
- Estimates housing units, households, population, and employment in **5-year** increments from **2020-2050**.
- Population is estimated by applying housing **occupancy factors** and **average household size** to the current and forecast housing units.



Forecast Round 10.0: Population

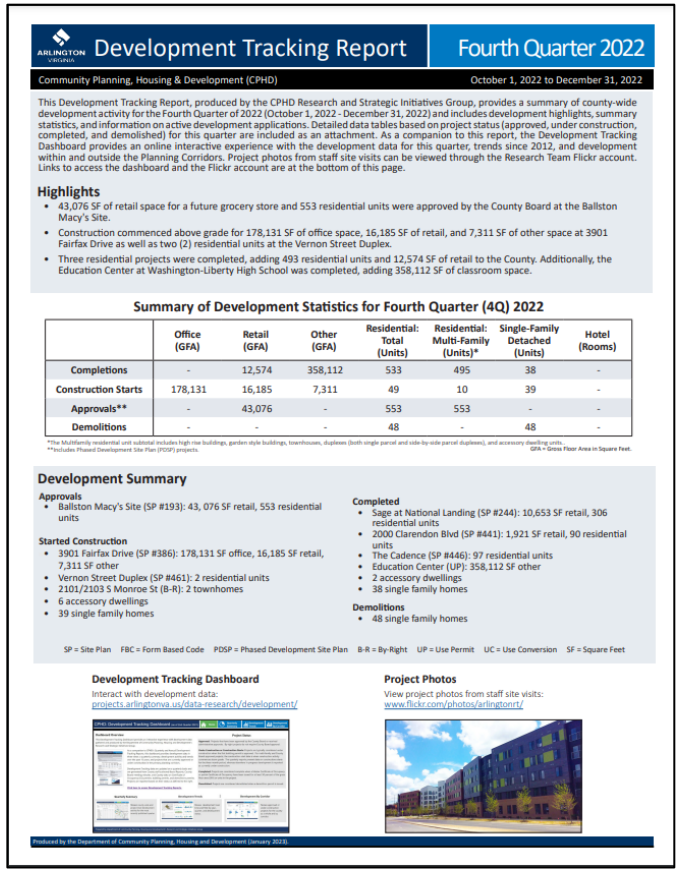


	2020	2025	2030	2035	2040	2045	2050
Population	238,600	245,800	260,200	272,900	285,200	298,000	311,200

Residential Development Trends

Development Tracking

- CPHD tracking system in operation since 2000.
- Tracks and analyzes commercial and residential development data based on permits and County Board actions.
- Quarterly and annual reports highlight activity and trends, construction starts, completions, new project approvals and demolitions.



ARLINGTON VIRGINIA Development Tracking Report | Fourth Quarter 2022

Community Planning, Housing & Development (CPHD) | October 1, 2022 to December 31, 2022

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 2022 (October 1, 2022 - December 31, 2022) 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. As a companion to this report, the Development Tracking Dashboard provides an online interactive experience with the development data for this quarter, trends since 2012, and development within and outside the Planning Corridors. Project photos from staff site visits can be viewed through the Research Team Flickr account. Links to access the dashboard and the Flickr account are at the bottom of this page.

Highlights

- 43,076 SF of retail space for a future grocery store and 553 residential units were approved by the County Board at the Ballston Macy's Site.
- Construction commenced above grade for 178,131 SF of office space, 16,185 SF of retail, and 7,311 SF of other space at 3901 Fairfax Drive as well as two (2) residential units at the Vernon Street Duplex.
- Three residential projects were completed, adding 493 residential units and 12,574 SF of retail to the County. Additionally, the Education Center at Washington-Liberty High School was completed, adding 358,112 SF of classroom space.

Summary of Development Statistics for Fourth Quarter (4Q) 2022

	Office (GFA)	Retail (GFA)	Other (GFA)	Residential: Total (Units)	Residential: Multi-Family (Units)*	Single-Family Detached (Units)	Hotel (Rooms)
Completions	-	12,574	358,112	533	495	38	-
Construction Starts	178,131	16,185	7,311	49	10	39	-
Approvals**	-	43,076	-	553	553	-	-
Demolitions	-	-	-	48	-	48	-

*The Multifamily residential unit subtotal includes high-rise buildings, garden-style buildings, townhouses, duplexes (both single-parcel and side-by-side parcel duplexes), and accessory dwelling units.
**Includes Phased Development Site Plan (PDSP) projects.
GFA = Gross Floor Area in Square Feet.

Development Summary

Approvals
- Ballston Macy's Site (SP #193): 43, 076 SF retail, 553 residential units

Started Construction
- 3901 Fairfax Drive (SP #386): 178,131 SF office, 16,185 SF retail, 7,311 SF other
- Vernon Street Duplex (SP #461): 2 residential units
- 2101/2103 S Monroe St (B-R): 2 townhomes
- 6 accessory dwellings
- 39 single family homes

Completed
- Sage at National Landing (SP #244): 10,653 SF retail, 306 residential units
- 2000 Clarendon Blvd (SP #441): 1,921 SF retail, 90 residential units
- The Cadence (SP #446): 97 residential units
- Education Center (UP): 358,112 SF other
- 2 accessory dwellings
- 38 single family homes

Demolitions
- 48 single family homes

SP = Site Plan | FBC = Form Based Code | PDSP = Phased Development Site Plan | B-R = By-Right | UP = Use Permit | UC = Use Conversion | SF = Square Feet

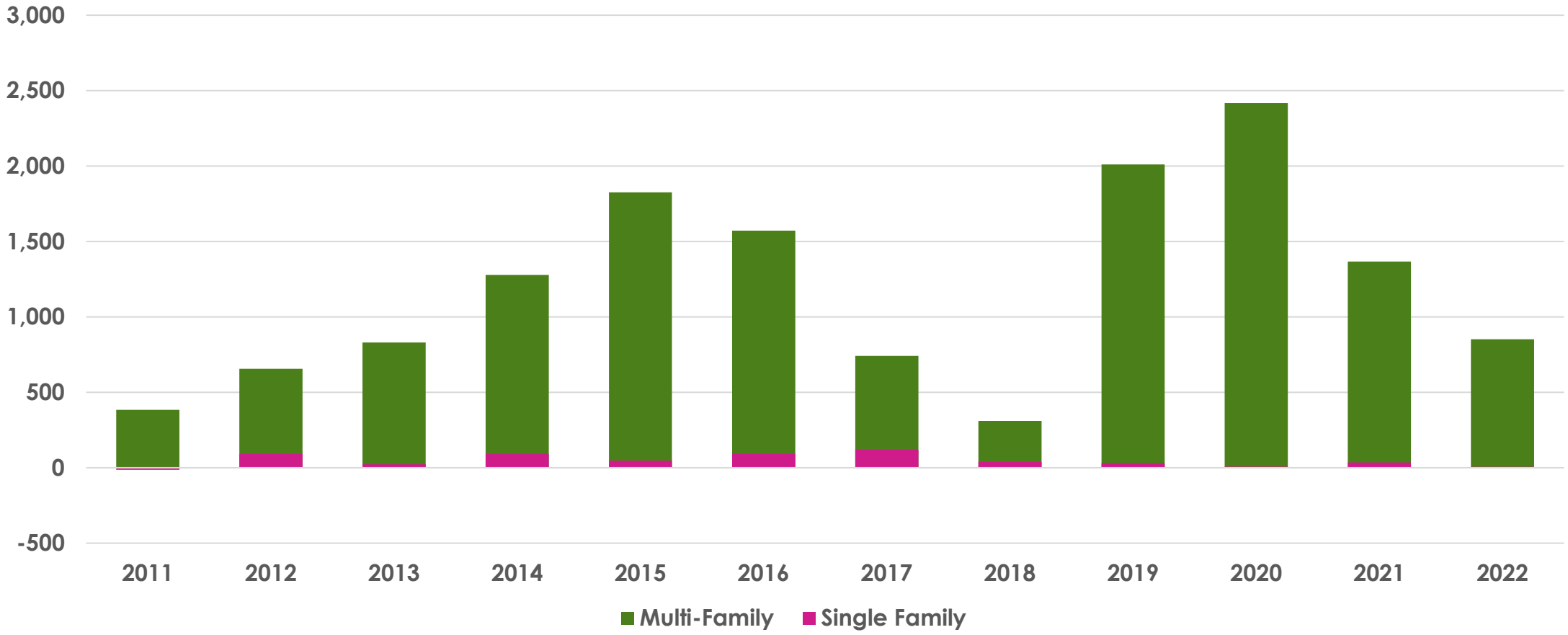
Development Tracking Dashboard
Interact with development data:
projects.arlingtonva.us/data-research/development/

Project Photos
View project photos from staff site visits:
www.flickr.com/photos/arlingtonrt/

Produced by the Department of Community Planning, Housing and Development (January 2023)

https://www.arlingtonva.us/Government/Projects/Data-Research/Development

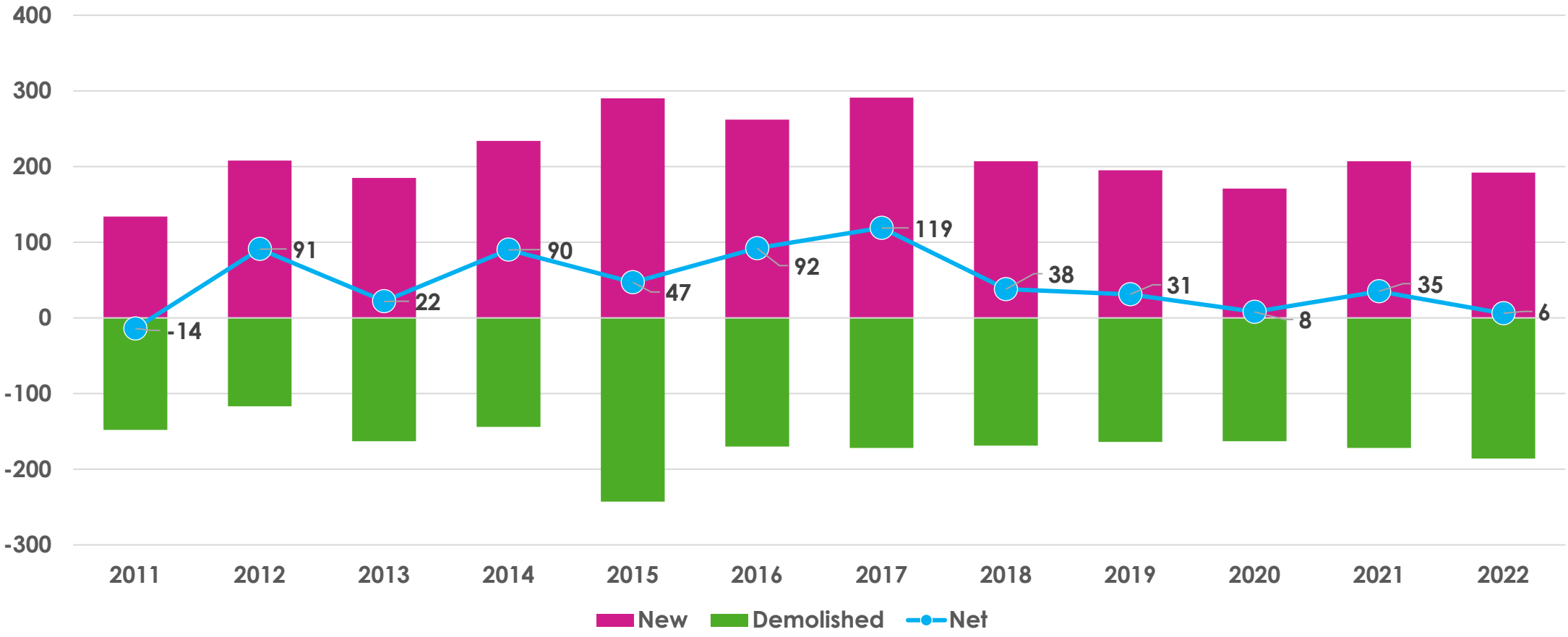
Net New Housing: Single Family and Multi-Family



Source: Arlington County, CPHD, Development Tracking Database

Housing Stock: Single Family 2011-2022

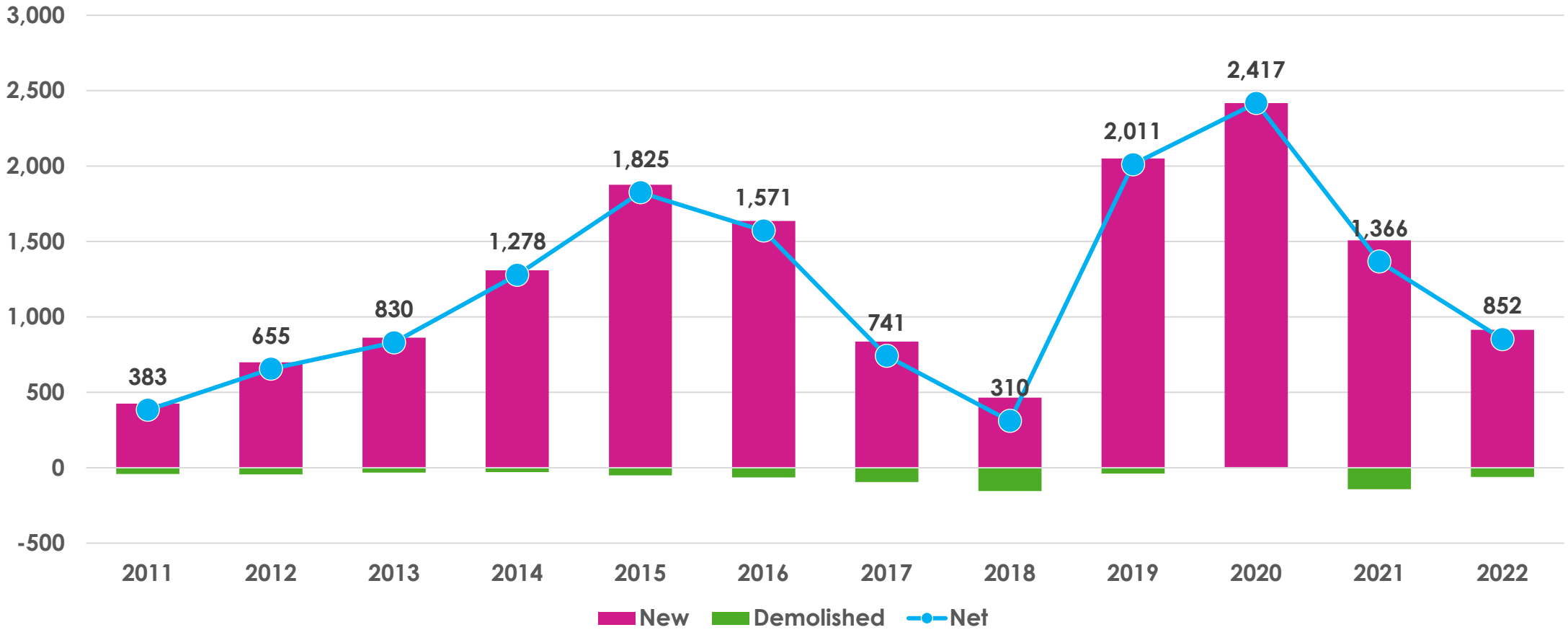
Single Family Detached, Townhomes, Duplexes, Side-by-Side



Source: Arlington County, CPHD, Development Tracking Database

Housing Stock: Multi-Family 2011-2022

Garden and Highrise



Source: Arlington County, CPHD, Development Tracking Database

Annual Profile Report

- Arlington's annual statistical factbook, containing over100 variables, provided by departments from across the county.
- Contains data related to population, housing, households, employment, development, schools & education, transportation, community services, health services, and the forecast.
- Profile 2023 will be released in the coming months.

Key Takeaways

1. Arlington's population age cohort 20-34 years has been declining since 2013.

2. The pandemic impacted natural increase and migration, resulting in Arlington's population decline after the 2020 Census.

3. Arlington's population age 65+ was the age cohort to increase from 2020-2021.

4. The number of births will likely continue to decline for Arlington, Virginia and the nation.

5. CPHD continually monitors the change in housing and demographics and updates population estimates and forecasts to reflect trends.

Questions?