Arlington Forecast
Methods

1) Land Use Inputs

GIS

Forecast Data
Plans
Zoning
GLUP
2010 Blocks

2) Demographic Assumptions

Density
Occupancy Rates
Household Size
Vacancy Rates
Employment – Space
Conversion Factor

3) Calibrate Development Timing

Review and Refine
1) Land Use Inputs

GIS

Forecast Data
Plans
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Density
Occupancy Rates
Household Size
Vacancy Rates
Employment – Space Conversion Factor

Review and Refine
Arlington Forecast
Methods: Step 1 – Land Use Inputs

• Growth in Areas consistent with the GLUP
  • Development Pipeline data (County-wide)
    • Projects Completed, Under Construction, or Approved as of June 30, 2014.
    • Basis of the 2015, 2020, and 2025 forecast years.
    • These data are shared with APS and included in their projections.
Arlington Forecast
Methods: Step 1 – Land Use Inputs

- Parcels with anticipated growth from approved Sector Plans and Small Area Plans.
  - Metro Station Areas
  - Columbia Pike
  - Other Planned Area
  - Development density and use informed by appropriate zoning district or plan guidance.
  - Basis of the 2025, 2030, 2035, and 2040 forecast years.

Growth in Planned Areas
Arlington Forecast Methods

2) Demographic Assumptions

- Density
- Occupancy Rates
- Household Size
- Vacancy Rates
- Employment – Space Conversion Factor

GIS
- Forecast Data
- Plans
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- 2010 Blocks

Review and Refine
2) Demographic Assumptions

- **Land Use Inputs** → **Forecast Housing Units** → **Occupancy Rates** → **Households**
- **2010 Census** → **Occupancy Rates** = **Households**
- **2010 Census** → **Average Household Size** = **Population**
Arlington Forecast Methods

2) Demographic Assumptions

- **Land Use Inputs** → Forecasted Office, Retail, Other, and Hotel Space
  - CoStar* → Occupancy Rates
  - Employment – Space Conversion Factor** → Employment

*CoStar is a private vendor of commercial office market data.
**Employment-Space Conversion Factors are utilized for occupied office, retail, other, and hotel space to generate an estimate or a forecast of employees.
3) Calibrate Development Timing

Review and Refine

Density
Occupancy Rates
Vacancy Rates
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Microsoft Office

Access

Arlington Forecast Methods
Arlington Forecast
Methods: Calibration

Development Timing

• Factors influencing timing:
  • Redevelopment potential
  • Parcel configuration
  • Ownership
  • Developer interest and staff knowledge

• Timing is adjusted based on:
  • Historic residential construction rates
  • Historic office construction rates

Market Absorption

• Calibrating Housing Units
  • 5-year average of net new multi-family units

• Calibrating New Office Construction
  • 5-year average of Arlington’s historic absorption rate
  • Calibrated by timing and the rate at which vacant office space is filled.

• Additional adjustments:
  • High vacancy
  • Remaining leases in BRAC affected buildings
  • NSF relocation
Arlington Forecast
Results - Preliminary Round 8.4 Forecast

Change from 2010-2040:
Increase of Approximately 75,400 people (+36%)

Source: Arlington County Planning Division
Arlington Forecast
Results - Preliminary Round 8.4 Forecast

Change from 2010-2040:
Increase of Approximately 79,000 jobs (+36%)

Employment

Source: Arlington County Planning Division
Arlington Forecast
Results - Preliminary Round 8.4 Forecast

Change from 2010-2040:

Increase of Approximately 35,000 Housing units (+33%)

Source: Arlington County Planning Division
How well did Arlington forecast population for year 2010?

<table>
<thead>
<tr>
<th>Forecast Version</th>
<th>Year Adopted</th>
<th>Forecast Years</th>
<th>2010 Forecast Population</th>
<th>Difference</th>
<th>% Difference</th>
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</thead>
<tbody>
<tr>
<td>Round 4</td>
<td>1987</td>
<td>24</td>
<td>178,800</td>
<td>(30,672)</td>
<td>-14.6%</td>
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<tr>
<td>Round 5</td>
<td>1994</td>
<td>17</td>
<td>201,100</td>
<td>-8,372</td>
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<tr>
<td>Round 6</td>
<td>1998</td>
<td>13</td>
<td>201,400</td>
<td>-8,072</td>
<td>-3.9%</td>
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<td>Round 6.3</td>
<td>2003</td>
<td>8</td>
<td>202,500</td>
<td>-6,972</td>
<td>-3.3%</td>
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<td>Round 6.4A</td>
<td>2004</td>
<td>7</td>
<td>212,229</td>
<td>2,757</td>
<td>1.3%</td>
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<tr>
<td>Round 7</td>
<td>2005</td>
<td>6</td>
<td>212,231</td>
<td>2,759</td>
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<tr>
<td>Round 7.1</td>
<td>2008</td>
<td>3</td>
<td>217,228</td>
<td>7,756</td>
<td>3.7%</td>
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<td>Round 7.2</td>
<td>2009</td>
<td>2</td>
<td>221,402</td>
<td>11,930</td>
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<tr>
<td>Round 8</td>
<td>2010</td>
<td>1</td>
<td>212,318</td>
<td>2,846</td>
<td>1.4%</td>
</tr>
</tbody>
</table>

Round 4:
- After the population decline of 1970
- 24 years out

Round 5:
- New econometric model
- Corrected for growth in the 1980s

Round 7.2:
- Produced before recession

Round 8:
- Corrected for economic conditions