LAND USE FORECASTS

Appendix C

Arlington Comp Plan
Land Use Forecasts

PREPARED BY

LELAND CONSULTING GROUP

2023

Overview

Key Questions

- How many residents and jobs were located in Arlington 2020*? Where were they located, and in what densities?

- How do population and jobs allocations made by Snohomish County for 2044 compare to a) the City's *capacity* to accommodate population and jobs, and b) the *likely* number of residents and jobs.

- Can the City accommodate the 2020-2044 population and jobs allocations within its current boundaries, or will boundary expansions to the west and southeast be necessary at some point in the future?

*2020 used as a baseline year as the latest available year for some data sources when planning process began.

Forecast Scenarios Overview

Scenario 1 — Lower Density

Uses City's vacant/underutilized layer; City assumptions re/ employment and housing density.

Scenarios 2-5 — Higher Job, Housing Density

- Removes high-value properties from City's vacant/underutilized layer to reflect lower likelihood of redevelopment and to reduce losses for existing jobs and housing.

- Density assumptions for employment and housing based on recent development trends using CoStar (commercial real estate information company) and City data on recent developments.

Variations added: Work from home estimates, higher density commercial development in Mixed Use zones, and removal of market-based development rate reduction (which reduces the amount of land expected to redevelop in 20 years based on recent development trends by zone).

Forecast Scenarios Overview

	Scenario 1: Lower Job, Housing Density	Scenario 2: 1 + Higher Job, Housing Density	Scenario 3: 2 + No Development Rate Reduction	Scenario 4: 2 + Higher Commercial Density, WFH	Scenario 5: 2 + WFH + No Development Rate Reduction
Developable Land	City V/UU Layer	City V/UU Layer with High-Value Properties Removed	City V/UU Layer with High-Value Properties Removed	City V/UU Layer with High-Value Properties Removed	City V/UU Layer with High-Value Properties Removed
Employment Density *Rentable Building Area/acre:* • Mixed Use/Comm. Zones • Industrial Zones *SF per Job:* • OTBD Zone • Other Comm. Zones • Industrial Zones	• 3,200 • 10,000 • 400 • 1,000 • 2,000	• 6,600 • 10,000 • 400 • 500 • 2,000	• 6,600 • 10,000 • 400 • 500 • 2,000	• 12,000 • 10,000 • 400 • 500 • 2,000	• 6,600 • 10,000 • 400 • 500 • 2,000
Work from Home Included in Employment #s?				✔	✔
Residential Density • SFR Zones • Smokey Point Area • RHC Zones • Mixed Use Zones	3-7 du/ac 27 17 15	3-7 du/ac 27 34 34	3-7 du/ac 27 34 34	3-7 du/ac 27 34 34	3-7 du/ac 27 34 34
Market-Based Development Rate Reduction Applied?	✔	✔		✔	

Scenario Findings Chart Guide

Scenario 2044 Totals

Orange dashed bars represent a shortfall with respect to the target

Orange bars represent forecast "capacity," or housing, jobs and population that can be accommodated with vacant/underutilized land

Light blue bars represent estimated jobs worked from home

Yellow dashed bars represent 2044 target allocations

Green bars represent units or jobs associated with "pending" developments (built 2021—)

Blue bars represent existing conditions, or the 2020 baseline

40,000

# #

# #

# #

Scenario 1: Lower Density | Scenario 5: 2 + WFH + No Development Rate Reduction

JOBS

Scenario 1: Lower Density | Scenario 5: 2 + No Development Rate Reduction

HOUSING

Scenario 1: Lower Density | Scenario 5: 2 + WFH + No Development Rate Reduction

POPULATION

Scenario 1 & 5 Findings for Jobs, Housing and Population

Scenario 1, 5 Findings

Scenario 5 is the scenario selected by the City for its planning processes as of June 2023. Scenario 5 assumes all developable land within the UGA will redevelop by 2044, at densities based on recent development in Arlington, with the inclusion of WFH populations in employment totals.

Capacity exceeds allocation; excess capacity.

Includes population from pending housing projects

Scenario 1 Total: 38,194
Scenario 5 Total: 55,449

Scenario 1 Total: 14,260
Scenario 5 Total: 25,782

Scenario 1 Total: 17,081
Scenario 5 Total: 25,677

2044 Target: 35,506

5,930
2044 Target: 24,751

2044 Target: 15,781

119

JOBS
- Scenario 1: Lower Density — 10,491 / 1,692 / 12,449
- Scenario 5: 2 + WFH + No Development Rate Reduction — 5,711 / 1,692 / 12,449

HOUSING
- Scenario 1: Lower Density — 3,593 / 4,368 / 9,120
- Scenario 5: 2 + No Development Rate Reduction — 12,189 / 4,368 / 9,120

POPULATION
- Scenario 1: Lower Density — 17,776 / 20,418
- Scenario 5: 2 + WFH + No Development Rate Reduction — 35,031 / 20,418

Legend: Projected Undersupply | Capacity | Pending | 2020 Baseline | 2044 Target

Jobs

Jobs Estimates

JOB ESTIMATES		
Estimate	**Year**	**Source**
10,706	2019	2021 HNA using OFM 2019
10,289	2019	2021 SnoCo BLR UGA estimate
15,733	2019	SnoCo BLR GIS total for UGA (EXEM_T field)
10,390	2019	OnTheMap LEHD (US Census)
10,267	2019	City Slides, source unknown
11,215	2020	PSRC Covered Employment Estimates (No geographic breakdown)
12,477	2020	2021 HNA using LUV2, 2017; OFM Estimates 2019
12,818	2023	ESRI Business Analyst
16,219	2020	EXEM_T adjusted, + 2020 projects (City/CoStar)
12,449	**2020**	**LCG Analysis (BLR + 2020 projects)**
JOB TARGETS		
21,320	2040	2021 HNA using LUV2, 2017; OFM Estimates 2019
24,751	**2044**	**UGA CCP Official Targets, City Slides**

Baseline Job Calculation

2019 Job Estimate (2021 Snohomish County BLR)   **# Jobs**

                                                                                                                                                                                    10,289

2020 Projects and Corrections to Existing Jobs (City, CoStar)

Project	Comm. SF	NAICS Type	SF per Job	# Jobs
Amazon Fullfillment Center	3,000,000	WTU	2,400	1,250
188th St Business Park	146,137	WTU	2,000	73
Gayteway Business Park	129,617	WTU	2,000	65
Epoch Design	90,000	WTU	2,000	45
Emory Lofts	6,000	Retail	700	9
Emory Lofts	10,000	Office	350	29
Emory Lofts	5,000	Other	400	13
The Lux	7,250	Retail	700	10
The Lux	7,250	Office	350	21
Centennial Park	7,655	Retail	700	11
SIMPLY Self Storage	45,458	Storage	20,000	2
BLR Job estimates for pending commercial development	461,068	Various	728	633
Subtotal				**2,160**

2020 Baseline (2019 Job Estimate + 2020 Projects):   **12,449** ⟶

WTU = Wholesale, Transportation, and Utilities.

Pending Job Calculation 2021-2023

Pending Projects (City, CoStar, BLR)

Project	Comm. SF	NAICS Type	SF per Job	# Jobs
Cacade Business Park per CoStar	1,252,000	WTU	2,000	626
Smart Cap				300
Outpost	91,040	Office	350	260
Public Utility District (PUD) Campus per BLR	235,000	WTU	2,000	118
Zahradnik	51,500	Retail	700	74
Swire Coca-Cola Distribution Center 59th Ave per BLR	135,000	WTU	2,000	68
WSU campus				63
Cascade Mixed Use	8,901	Retail	700	13
Cascade Mixed Use	1,393	Office	350	4
Cascade Mixed Use	1,842	Other*	400	5
Williams	43,000	Retail	700	61
Pilchuck Village	18,721	Retail	700	27
VanLeuven	5,229	Office	350	15
Reece Construction per BLR	4,451	Office	350	13
Ironwood	8,990	Retail	700	13
Fullwiler	4,352	Office	350	12
Goldstream	6,250	Retail	700	9
Royal Storage per BLR	124,320	Storage	20,000	6
Paisley Lofts	4,000	Retail	700	6
Total Pending:				**1,692**
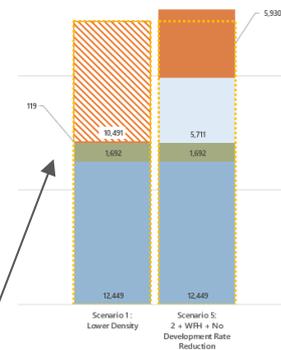
** "Other" = "residential lounge" in Cascade Mixed Use apartment development.

Employment Capacity Calculation - Scenario 1

| Vacant/ Underutilized Parcel Acreage | ✖ | Commercial Rentable Building Area per Acre ÷ SF per Job | − | Jobs Lost to Redevelopment | ✖ | % of Vacant & Underutilized Acres Expected to Develop in 20-year Period | = | **Net New Jobs Capacity** |

SOURCE:

| City Vacant/ Underutilized Parcel Data | LCG Estimate & City Input | BLR 2019 Estimates Joined to City Vacant & Underutilized Parcel Data | LCG Estimate |

Employment Capacity Calculation - Scenario 2, 3, 4, 5

| Vacant/ Underutilized Parcel Acreage *High Value Properties Removed** | ✖ | Commercial Rentable Building Area per Acre ÷ SF per Job | ▬ | Jobs Lost to Redevelopment *High Value Properties Removed** | ✖ | % of Vacant & Underutilized Acres Expected to Develop in 20-year Period | ═ | **Net New Jobs Capacity** |

SOURCE:

| City Vacant/ Underutilized Parcel Data, County Property Value Data | LCG Estimate & City Input | BLR 2019 Estimates Joined to City Vacant & Underutilized Parcel Data | LCG Estimate |

*High value properties defined as those with an Improvement to Land Value Ratio, or ratio of building value relative to land, at or over 1.0.
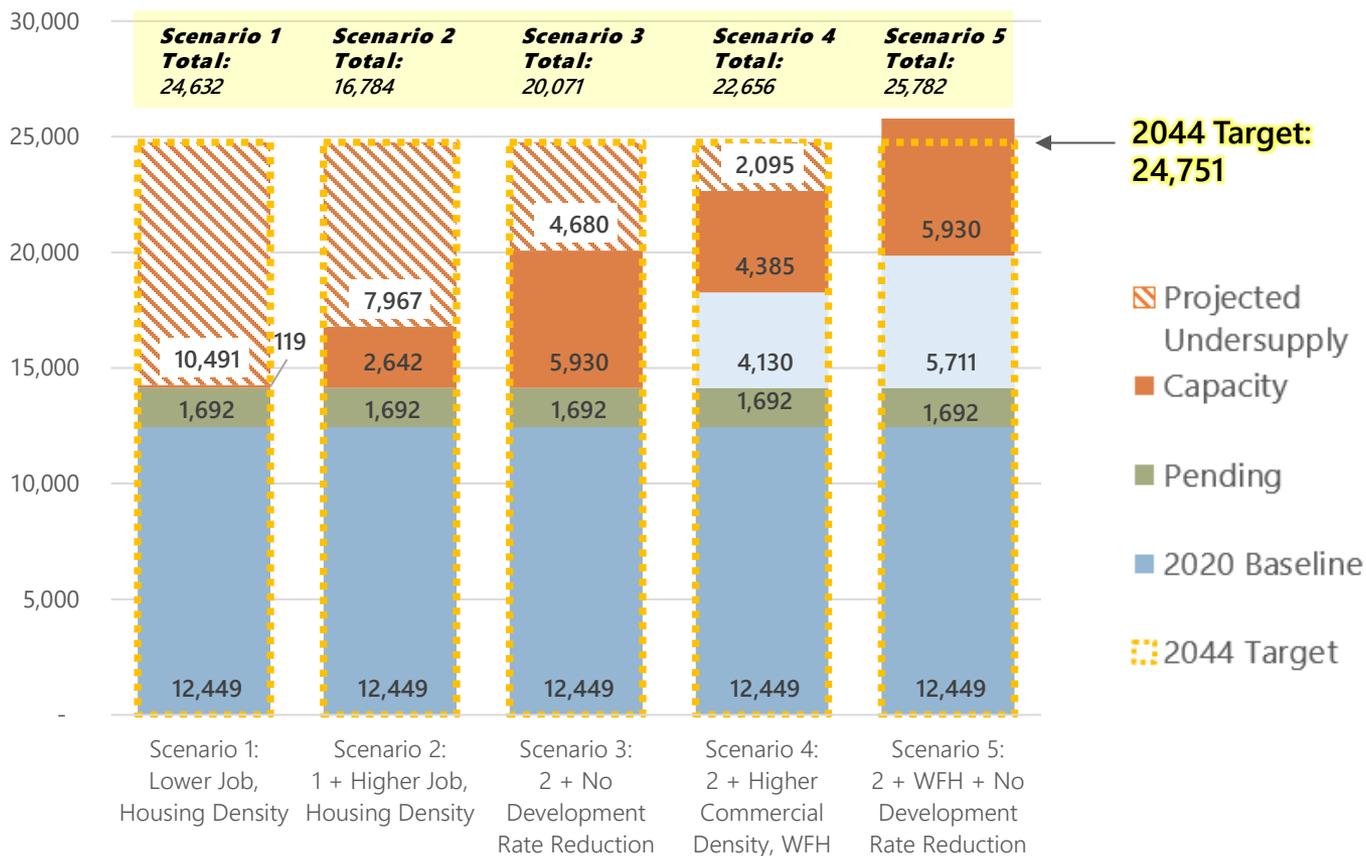
Vacant and Underutilized Properties (City Data)

Legend

Parcel Type per City:

- Under-utilized
- Vacant

PIONEER HWY E

SR 530

I-5

SR 9

N FRENCH AVE

SR 530

E HIGHLAND DR

TVEIT RD

211TH PL NE

204TH ST NE

CEMETERY RD

47TH AVE NE

67TH AVE NE

BURN RD

188TH ST NE

SMOKEY POINT BLVD

188TH ST NE

59TH AVE NE

186TH ST NE

SR 531

172ND ST NE

172ND ST NE

51ST AVE NE

SR 9

MCELROY RD

SR 531

0   0.5   1 mi

Vacant and Underutilized Properties, Pending Removed

Legend

Removals (New/Pending Development)

Parcel Type Revised:
Under-utilized
Vacant

PIONEER HWY E

SR 530

211TH PL NE

E HIGHLAND DR

N FRENCH AVE

SR 9

SR 530

Reserve / Portage Creek Apartments

Arlington Townhomes

Williams

204TH ST NE

East Hill

CEMETERY RD

Gayteway BP

Amber Grove

47TH AVE NE

67TH AVE NE

SR 9

TVEIT RD

BURN RD

188TH ST NE

59TH AVE NE

188TH ST NE

186TH ST NE

Bridgemont

SMOKEY POINT BLVD

WSU campus

MCELROY RD

I-5

VanLeuven

172ND ST NE

172ND ST NE

SR 531

Allen Townhomes

51ST AVE NE

Trailer Boss

SIMPLY Self Storage

SR 9

0   0.5   1 mi

Scenario 2, 3, 4, 5. High-Value Properties Excluded

Legend

Improvement to Land Value Ratio:

- 0 - 1 (Included in Scenarios 2, 3, 4, 5)
- 1 - 11.708 (Excluded from Scenarios 2, 3, 4, 5)

Scenario 2, 3, 4, 5. High-Value Properties Excluded

Job Capacity (2044)

Work from home estimate: 10.3% * 2044 population. LCG methodology calculated WFH population based on estimated days WFH per week by sector, and workers employed in that sector.
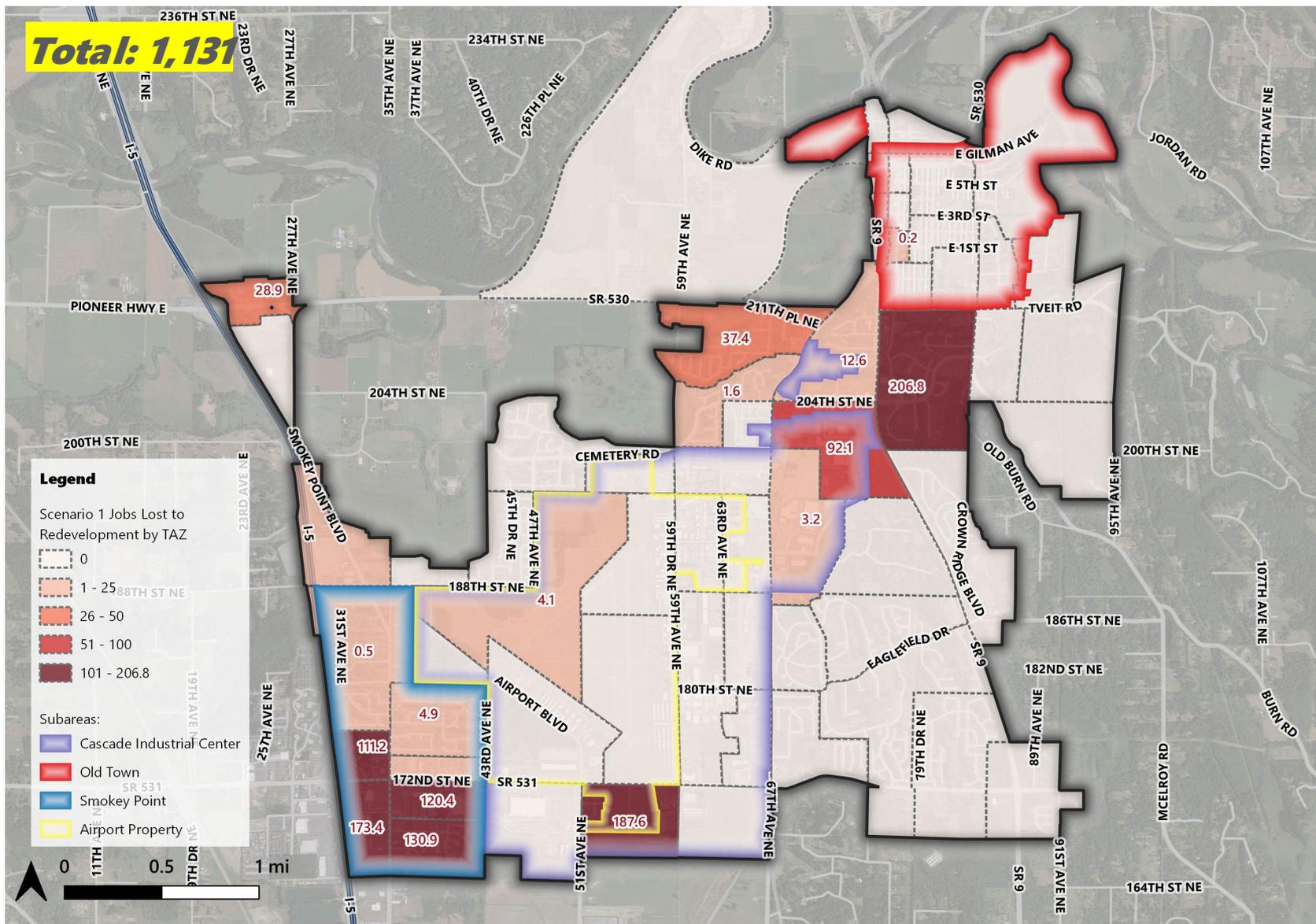
Scenario 5 is the scenario selected by the City for its planning processes as of June 2023. Scenario 5 assumes all developable land within the UGA will redevelop by 2044, at densities based on recent development in Arlington, with the inclusion of WFH populations in employment totals.


Chart: Job Capacity (2044) — stacked bar chart by scenario.

	Scenario 1: Lower Job, Housing Density	Scenario 2: 1 + Higher Job, Housing Density	Scenario 3: 2 + No Development Rate Reduction	Scenario 4: 2 + Higher Commercial Density, WFH	Scenario 5: 2 + WFH + No Development Rate Reduction
Scenario Total	24,632	16,784	20,071	22,656	25,782
Projected Undersupply	10,491 / 119	7,967	4,680	2,095	
Capacity		2,642	5,930	4,385	5,930
(light blue)				4,130	5,711
Pending	1,692	1,692	1,692	1,692	1,692
2020 Baseline	12,449	12,449	12,449	12,449	12,449

2044 Target: 24,751

Legend:
- Projected Undersupply
- Capacity
- Pending
- 2020 Baseline
- 2044 Target

JOBS

TAZ Boundaries

Current Jobs by TAZ (2020)

Total: 12,449
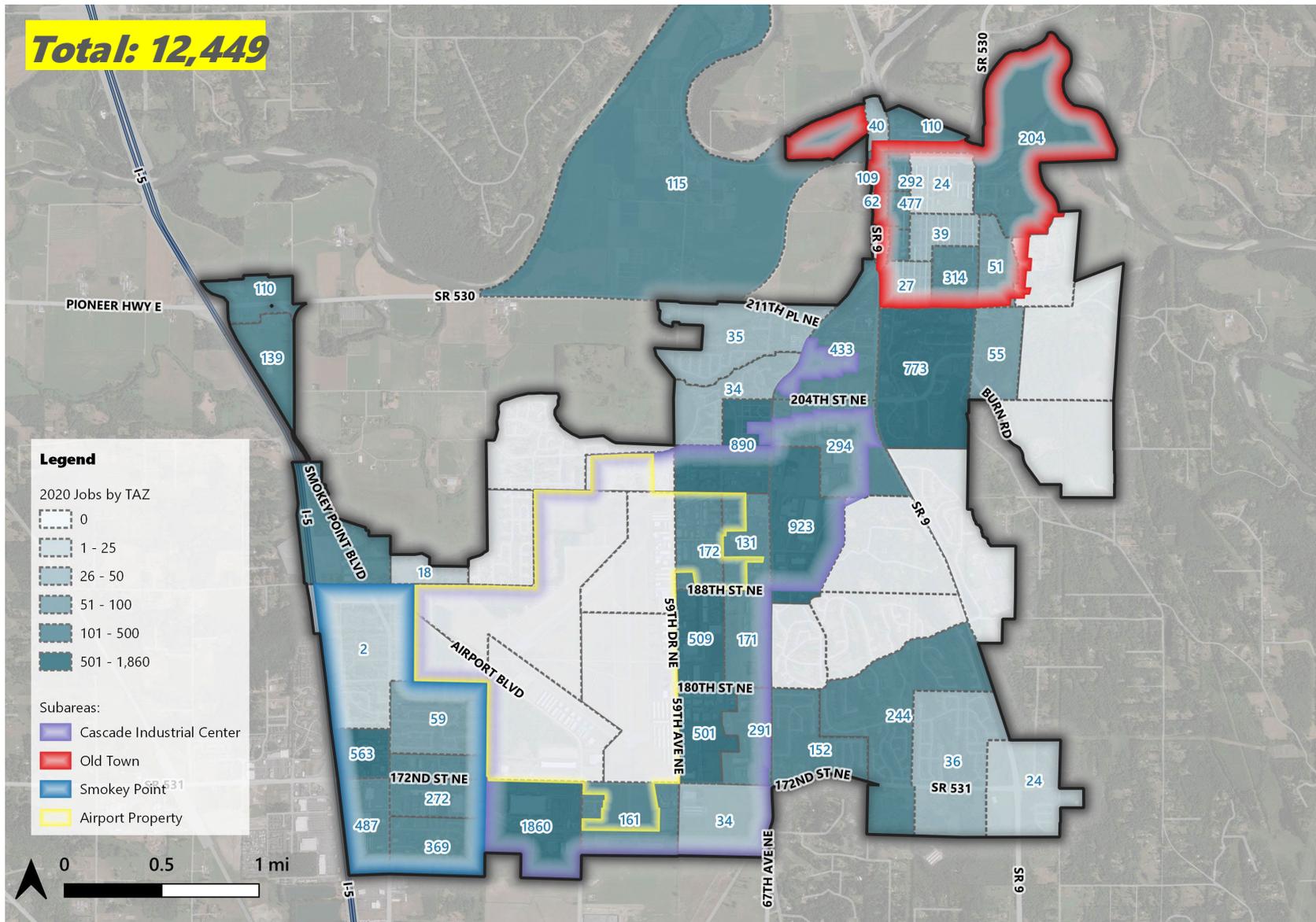
Scenario 1. Jobs Lost to Redevelopment by TAZ

Scenario 1. Net New Jobs Units by TAZ (2044)

Total: 1,811 (Includes Pending and Capacity)

In Scenario 1, most job growth is focused in the CIC due to a lower displacement of existing employment relative to other areas and redevelopable industrial and commercial lands Yet, given the lower historic and recent employment densities for this area as well as mixed-use developments in other areas, the City requires additional land to accommodate an estimated shortfall of 10,491 jobs according to the Scenario 1 forecast.

Legend

Scenario 1 Net New Jobs by TAZ
- -149 - -1
- 0
- 1 - 25
- 26 - 50
- 51 - 100
- 101 - 500
- 501 - 633

Subareas:
- Cascade Industrial Center
- Old Town
- Smokey Point
- Airport Property

0   0.5   1 mi
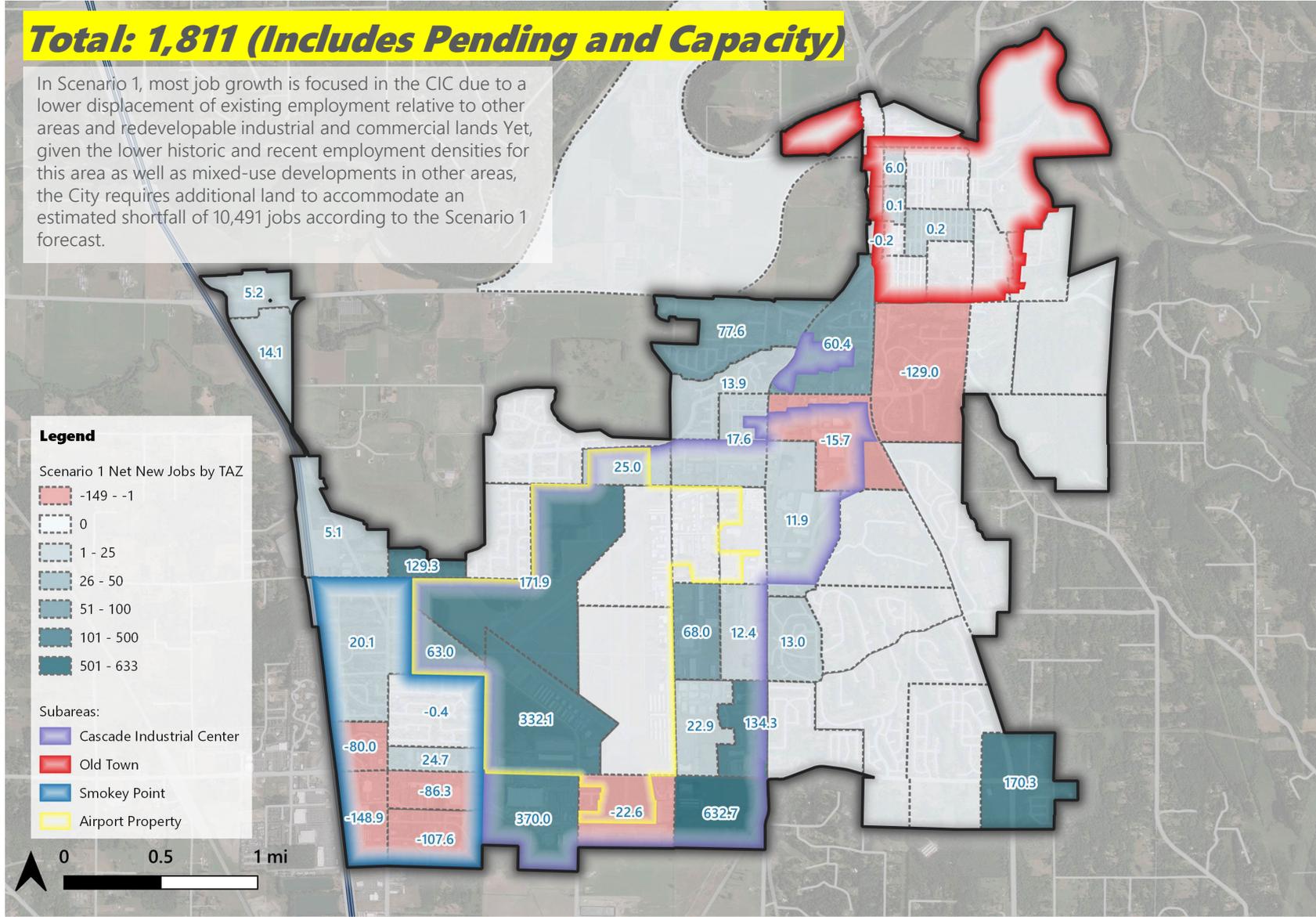
*Work from home estimates associated with pending housing development not included.

Scenario 5. Net New Jobs Units by TAZ (2044)

Total: 7,622 (Includes Pending and Capacity)*

Scenario 5 surpasses the 2044 jobs target by excluding higher-value parcels (which greatly reduces jobs lost to redevelopment) and assuming higher employment densities, leading to a net new jobs of 5,930 on developable acreage in addition to 1,692 pending.
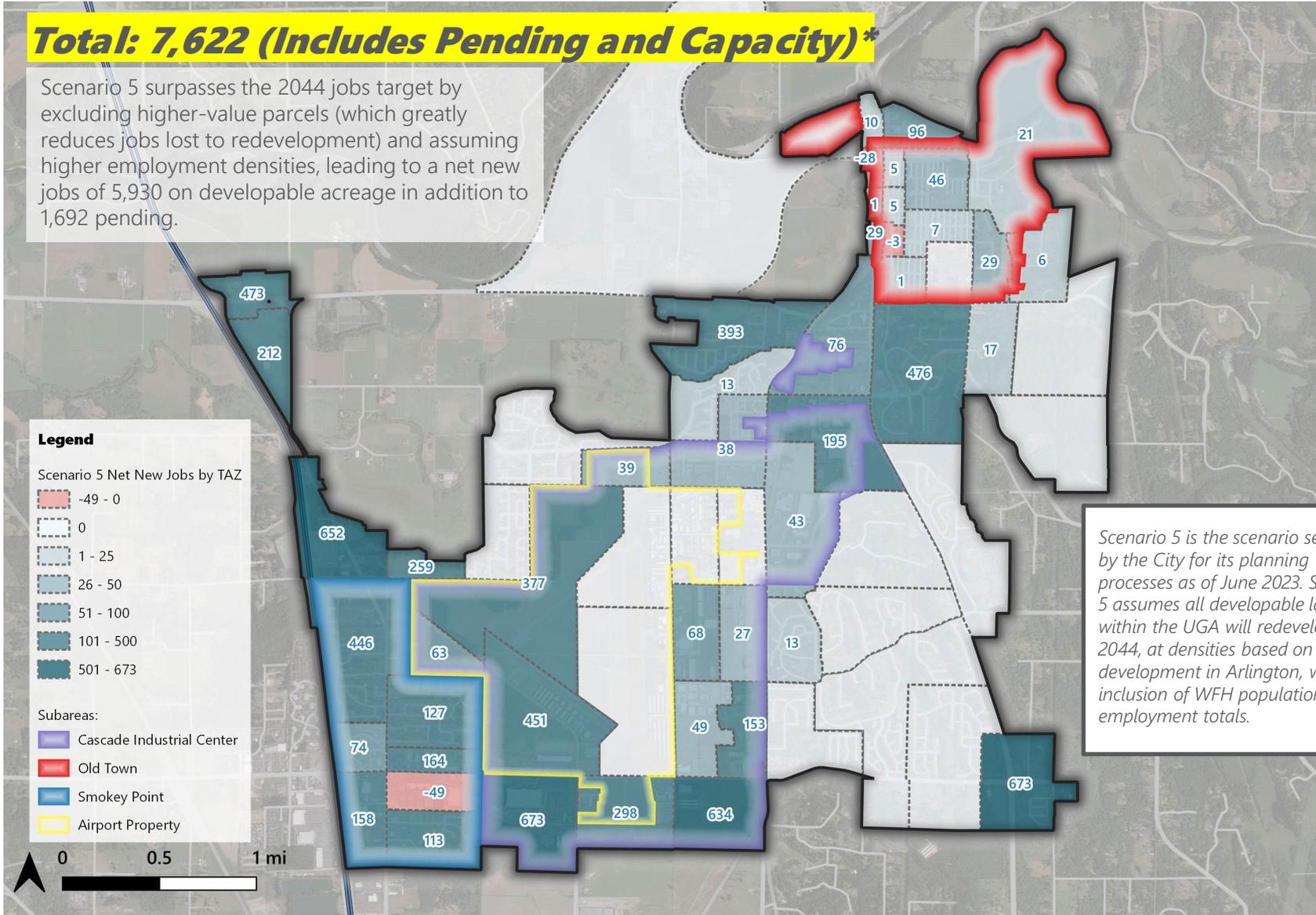
Legend

Scenario 5 Net New Jobs by TAZ
- -49 - 0
- 0
- 1 - 25
- 26 - 50
- 51 - 100
- 101 - 500
- 501 - 673

Subareas:
- Cascade Industrial Center
- Old Town
- Smokey Point
- Airport Property

0   0.5   1 mi

Scenario 5 is the scenario selected by the City for its planning processes as of June 2023. Scenario 5 assumes all developable land within the UGA will redevelop by 2044, at densities based on recent development in Arlington, with the inclusion of WFH populations in employment totals.

Projected Employment Change

For the **county overall, higher-density occupations including healthcare and education are expected to grow faster than lower-density industrial jobs**—with potential implications for future employment land use needs in Arlington.

Projected Employment Change, Snohomish County, 2020-2030
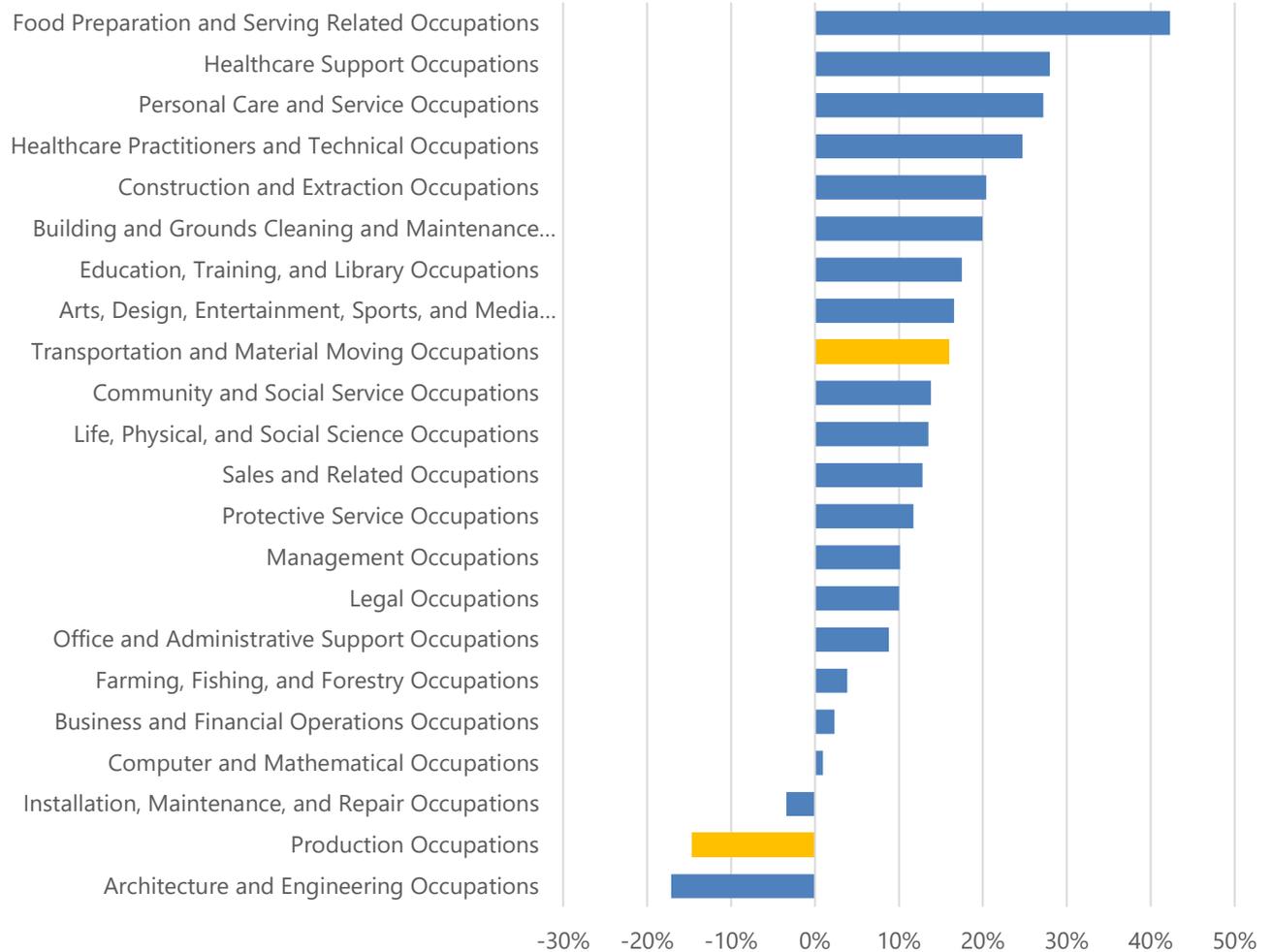
Source: Washington Employment Security Department, Long-term alternative occupational employment projections, July 2022

Projected Employment Change

Yet Puget Sound Regional Council (PSRC) forecasts the **largest actual increase in jobs in Arlington will be in Manufacturing and WTU** (2020-2044).
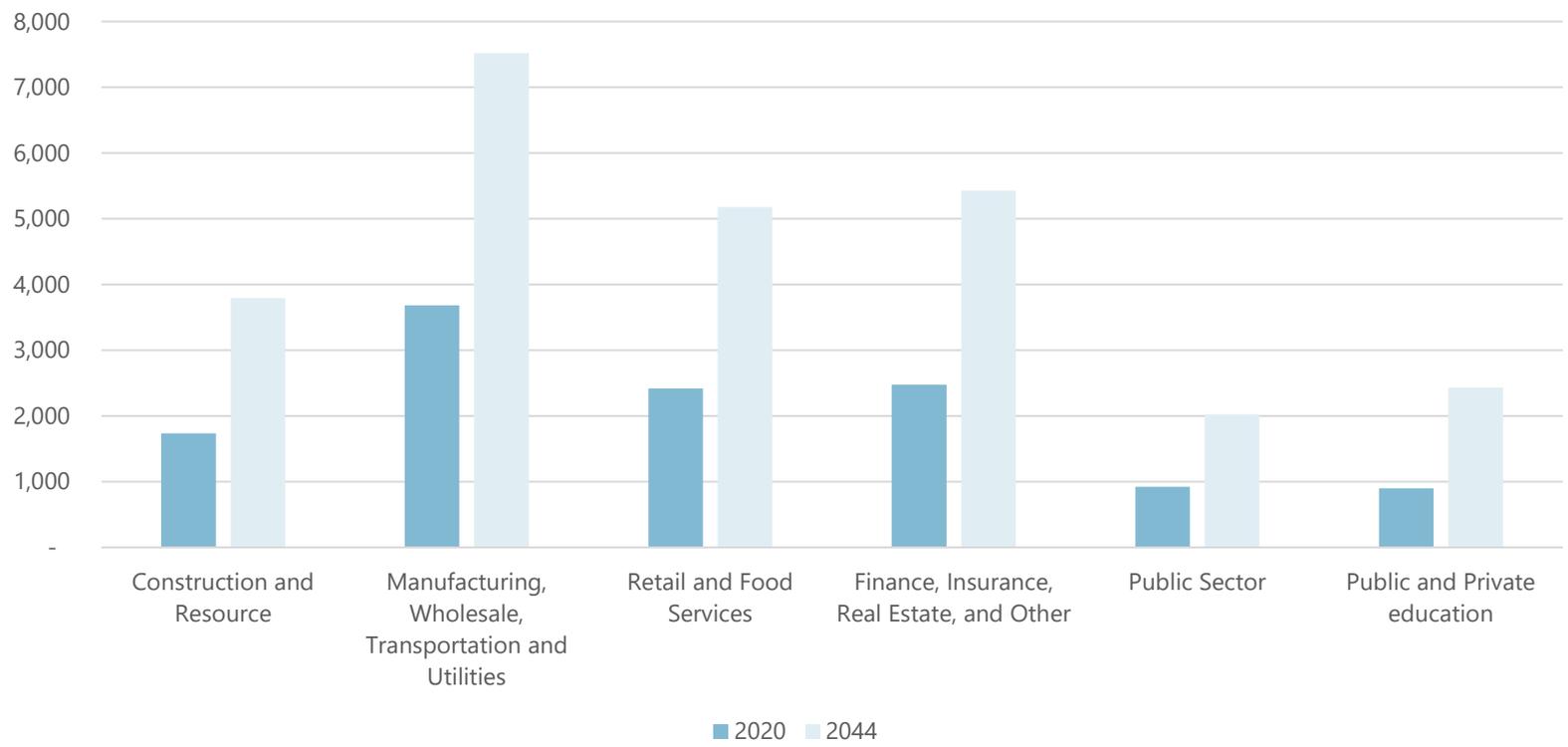
Source: PSRC LUV-IT Land Use Projections, May 2023

Cascade Industrial Center

Historically, the CIC has been a "**low density**" Manufacturing Industrial Center (1.3 jobs per acre 2010) due to:

- Varied density of industrial, non-industrial uses
- Construction HQ housing equipment vs. workers
- Marijuana production

AMMIC Firms by Employment & Sector, 2015
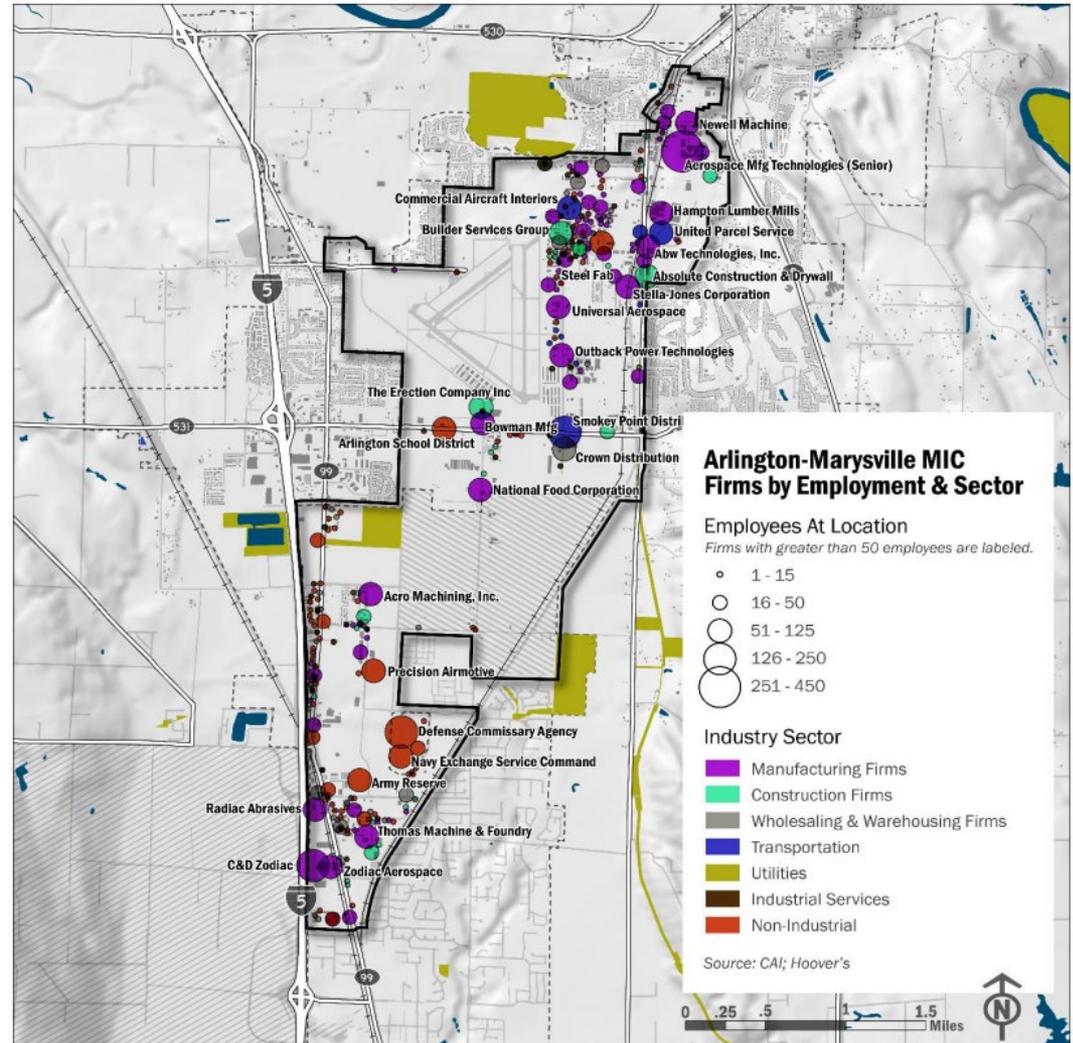
Source: [Arlington-Marysville Manufacturing-Industrial Center Market Study](), Community Attributes Inc 2016, pp 2, 13, 28, 37.
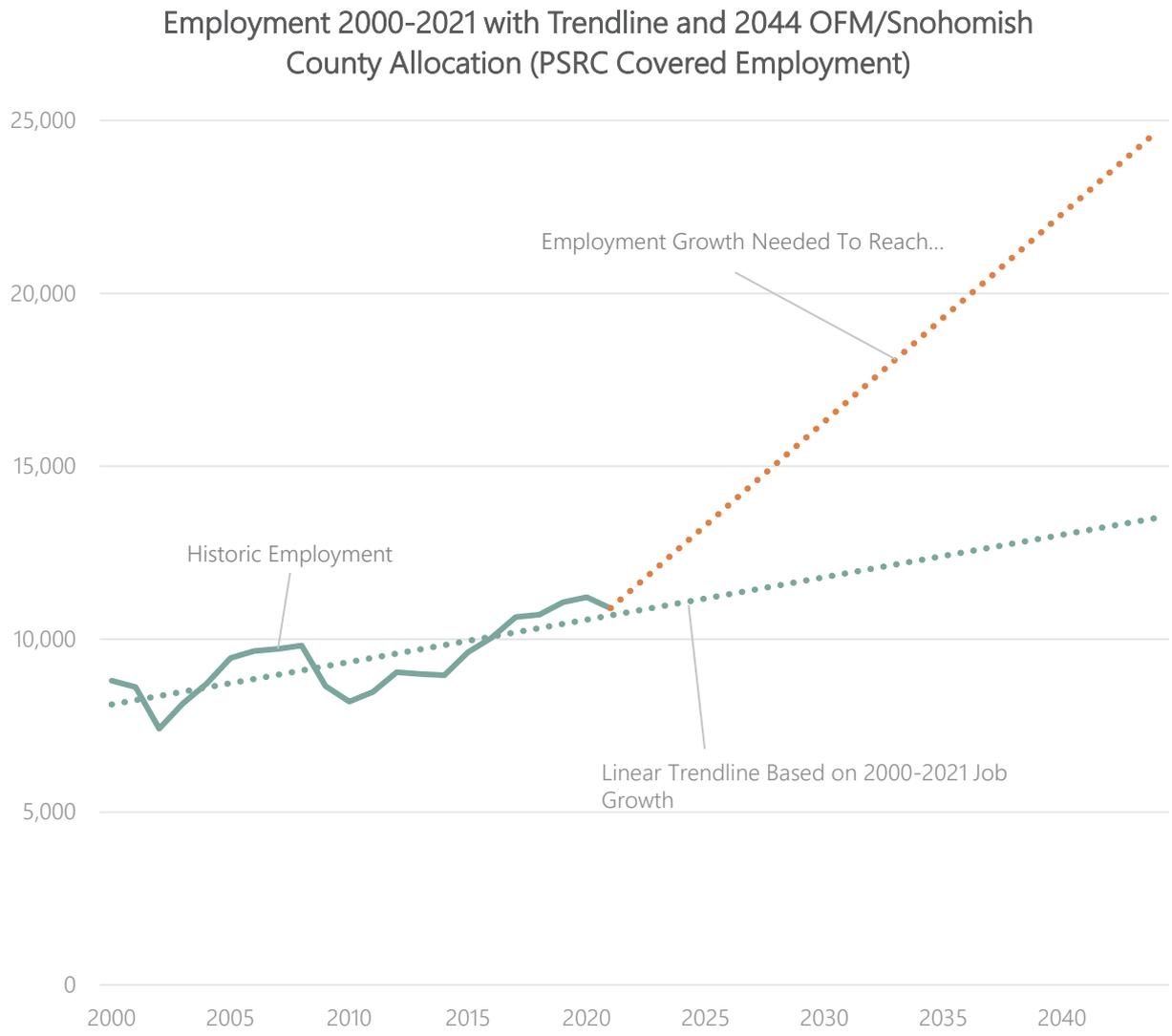
Recent Project Employment Density
Top Ten Employment Projects Built 2012+ by Rentable Building Area

1. Amazon

2. Gayteway Business Park

3. Cascade Business Park

4. SmartCap Arlington Air

5. Centennial Park

6. The Outpost Apts

7. 188th St Business Park

8. Cascade NW Storage

9. Best Western

10. Epoch Design

Legend

Development Type:
- 🟠 Multi-Family
- 🔴 Retail
- 🔵 Office
- 🟣 Health Care
- 🟣 Hospitality
- ⚫ Industrial/Flex
- 🟤 Specialty

Development Size:
RBA
- 500+k SF
- 10k

Subareas:
- CIC
- Old Town
- Smokey Point
- Airport Property

0   0.5   1 mi

Historic and Future Job Growth

Arlington's jobs target does not match actual historic trends in job growth.

Employment 2000-2021 with Trendline and 2044 OFM/Snohomish County Allocation (PSRC Covered Employment)

Employment Growth Needed To Reach...

Historic Employment

Linear Trendline Based on 2000-2021 Job Growth

Future Employment Density

Allocation of Growth Targets:

- PAC developed a methodology for translating the population and employment projections in VISION 2050 by regional geography to individual jurisdictions

- Methodology takes into account the capacity results to 2035 from the 2021 BLR

- In addition, a series of data factors were used to distribute growth beyond 2035 to individual jurisdictions, that take into account:
  - existing population and employment distribution
  - change over the past decade
  - volume of pending development
  - number of light rail and HCT stations
  - MIC locations, and
  - transportation accessibility to job centers (for population)

High-Capacity Transit: Bus Rapid Transit, 2027

Source: Community Transit
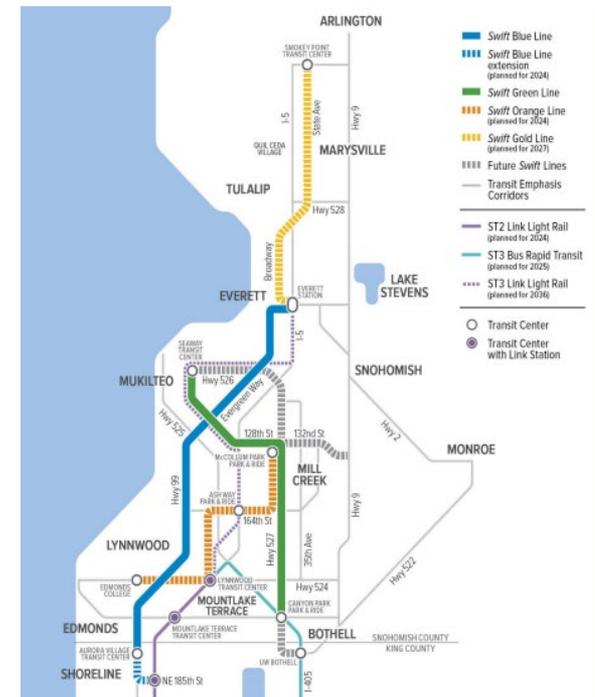
Source: 2044 Initial Growth Targets Recommended by SCT PAC presentation, 2021

Future Employment Density

Cascade Industrial Center Recent, Future Development

BRAND LEADERSHIP

There is major development underway in CIC, with more industry leaders announcing plans for the future.

Over 2,000 jobs in high-tech manufacturing, packaging, and distribution will be filled in 2021 and nearly 12,000 new jobs will be ready by 2040.

Source: Cascade Industrial Center webpage

Amazon.com founder Jeff Bezos stands next to an exhaust nozzle during a media tour of Blue Origin in Kent in 2016. (AP Photo/Donna Blankinship)

Company related to Bezos' space venture lands in Arlington

Casting Operations, which is affiliated with Blue Origin of Kent, is building on six acres near the airport.

Eviation's all-electric plane in flight Tuesday morning, in Moses Lake. (Eviation)

Arlington's all–electric plane, Alice, takes first test flight

Eviation Aircraft's battery-powered plane logs successful first flight from Grant County International Airport in Moses Lake.

Source: HeraldNet.com

Housing and Population

Housing Estimates

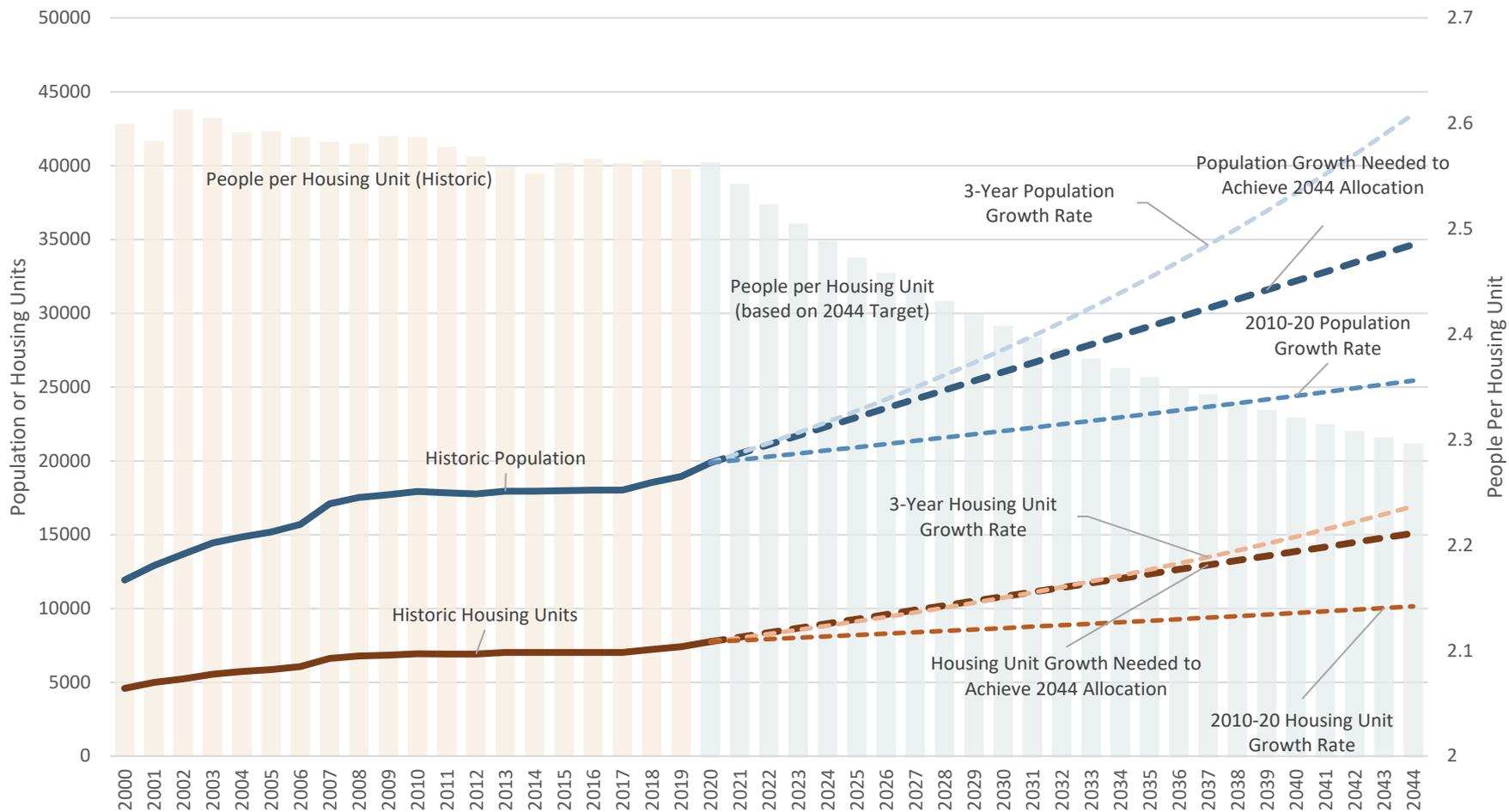| HOUSING ESTIMATES		
Estimate	**Year**	**Source**
7,254	2019	2021 HNA using OFM 2019
7,521	2019	2021 SnoCo BLR
7,733	2019	SnoCo BLR GIS
8,269	2020	ACS 5-Year
7,751	2020	OFM
7,750	2020	County PAC Working Group
9,120	2020	LCG Analysis (BLR + 2020 projects)
HOUSING TARGETS		
9,654	2040	2021 HNA using LUV2, 2017; OFM Estimates 2019
15,088	2044	HO-5 Report (To be replaced by HO-5 update)
15,781	2044	County PAC Working Group Target

Population Estimates

POPULATION ESTIMATES		
Estimate	**Year**	**Source**
19,740	2019	2021 HNA using OFM 2019
19,734	2019	2021 SnoCo BLR
19,868	2020	Census (CITY ONLY)
19,868	2020	OFM (CITY ONLY)
20,418	2020	UGA CCP Official Targets (UGA)
POPULATION TARGETS		
26,390	2040	2021 HNA using LUV2, 2017; OFM Estimates 2019
34,649	2044	CITY CCP Official Targets, City Slides
35,506	2044	UGA CCP Official Targets, City Slides

Achieving Arlington's population and housing allocations would be possible based on more recent growth trends, but not the longer-term historic growth rates.

OFM Population and Housing Units, 2000-2020, OFM/Snohomish County 2044 Population Allocations and

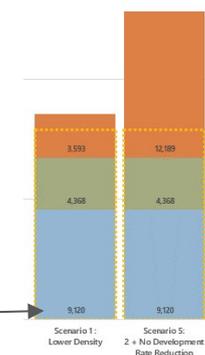# Baseline Housing Calculation

2019 Housing Estimate (BLR GIS)   # Units

7,733

2020 Projects (City)

Project	# Units	Notes
The Villas	428	Adds 312 to 116 in BLR
Cedar Point Senior / Baker Moore	255	
Centennial Park	206	
Park 77	200	Adds 18 to 182 in BLR
Emerald Springs RV Park	180	
Affinity	170	
The Lux	129	
Smokey Point RV Park	65	BLR states 85
Emory Lofts	64	
31st St Apartments / The Landing at Smokey Point	48	
SFR Completed Units per City	25	
Subtotal	**1,770**	

2020 Baseline (2019 Units + 2020 Project Units):   **9,120**

Pending Housing Calculation 2021-2023

Pending Projects (City, BLR)

Project	# Units
East Hill	2,000
Outpost	516
Zahradnik	334
Williams	300
Pilchuck Village	182
Reserve / Portage Creek Apartments	150
Gillman Walk Townhomes	115
Cascade Mixed Use	108
Ironwood	102
Magnolia Place	100
Goldstream	96
Pioneer Point	94
Amber Grove	84
Paisley Lofts	46
Allen Townhomes	43
Fullwiler	28
VanLeuven	18
Arlington Townhomes	18
Bridgemont (Single family homes)	18
Portage Creek Village	8
SFR Pending in BLR	8
Total Pending:	**4,368**

Scenario 1: Lower Density — 3,593 / 4,368 / 9,120
Scenario 5: 2 + No Development Rate Reduction — 12,189 / 4,368 / 9,120
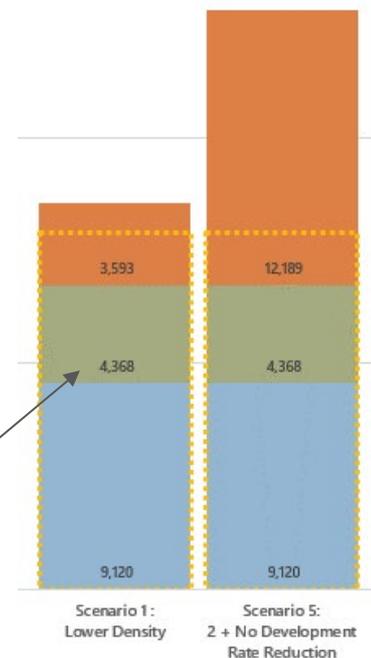
Housing & Population Capacity Calculation

Vacant/ Underutilized Parcel Acreage, Smokey Point Subarea

Source: City Vacant/ Underutilized Parcel Data & City Neighborhood Boundaries

✕

Unit Per Acre Assumption per Zone, or 27 Unit per Acre Assumption for Parcels in Smokey Point Subarea

Source: LCG Estimate & City Input

−

Housing Units Lost to Redevelopment

Source: BLR 2019 Estimates Joined to City Vacant & Underutilized Parcel Data

✕

% of Vacant & Underutilized Acres Expected to Develop in 20-year Period

Source: LCG Estimate

=

Net New Housing Capacity

Net New Housing Units

✕

People per Household per zone

Source: City Input

−

Population Lost to Redevelopment (HU lost * 2.55 PPH current avg)

Source: BLR 2019 Estimates Joined to City Vacant & Underutilized Parcel Data
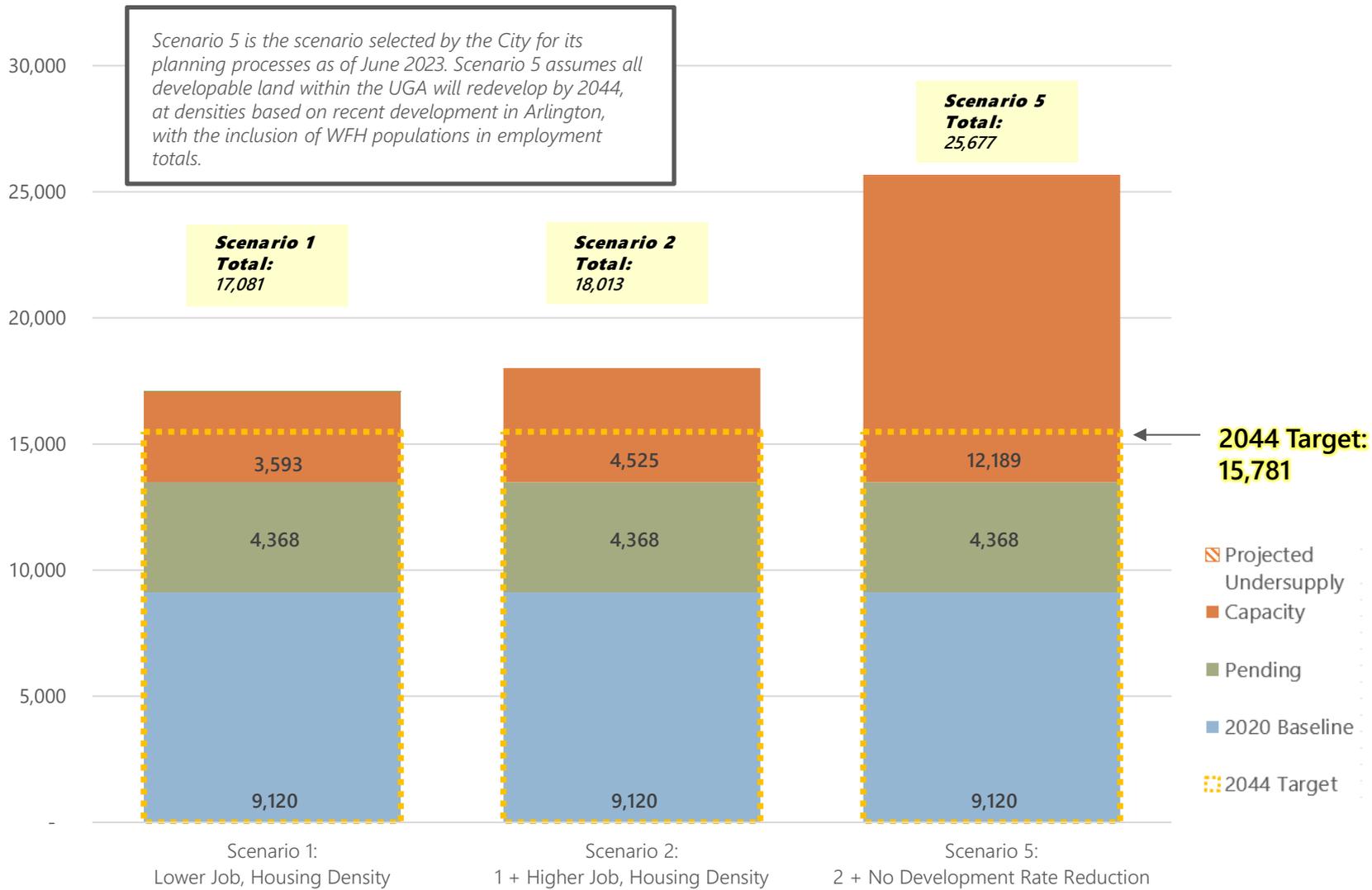
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Net New Population

Note: As in the Jobs Capacity Calculation, Scenarios 2, 3, 4, and 5 removed High-Value Vacant and Underutilized Properties, or those with an Improvement to Land Value Ratio of 1.0 or higher.
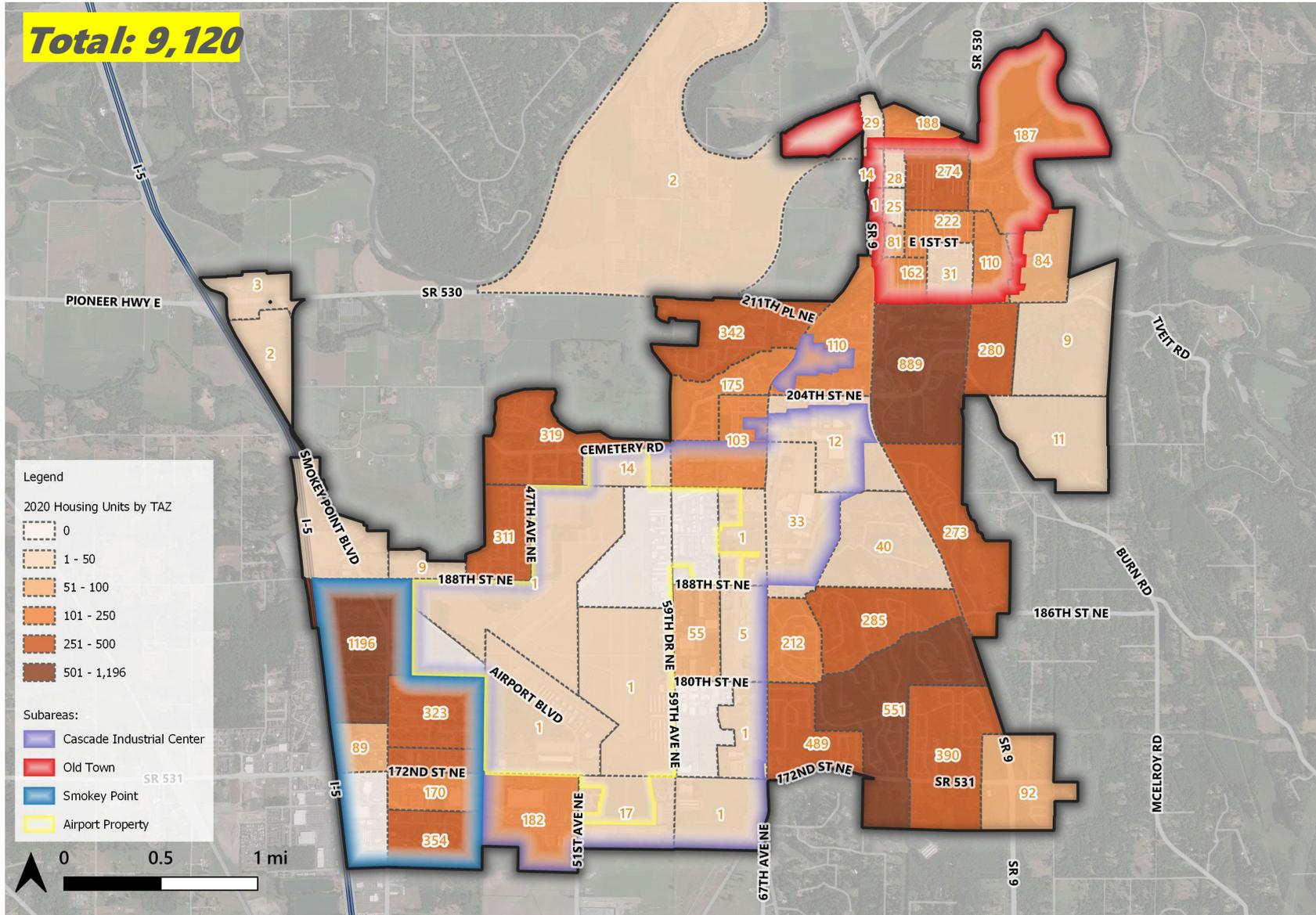
Housing Capacity (2044)

Scenario 5 is the scenario selected by the City for its planning processes as of June 2023. Scenario 5 assumes all developable land within the UGA will redevelop by 2044, at densities based on recent development in Arlington, with the inclusion of WFH populations in employment totals.

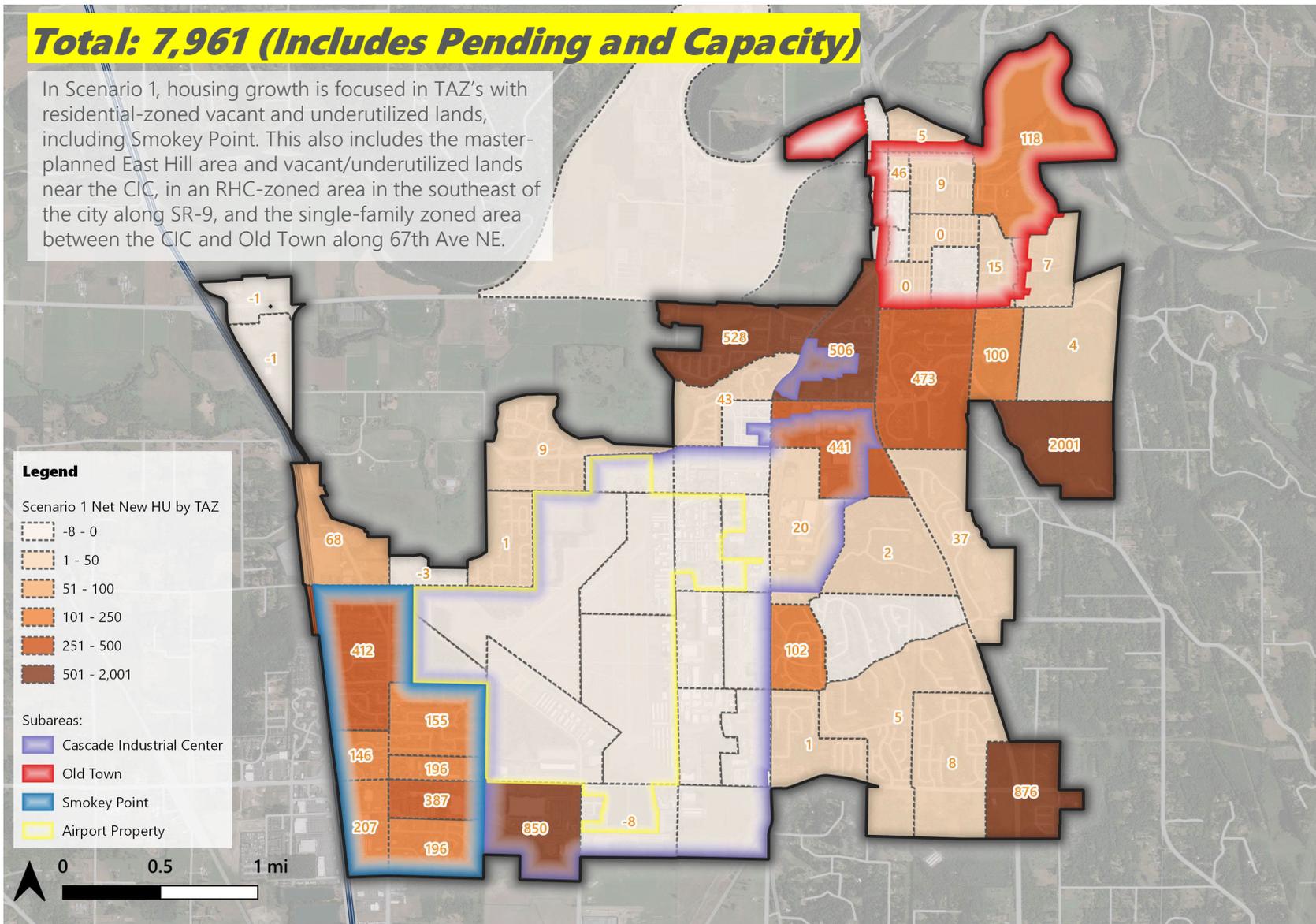Scenario 1
Total:
17,081

Scenario 2
Total:
18,013

Scenario 5
Total:
25,677

2044 Target:
15,781

	Scenario 1	Scenario 2	Scenario 5
Capacity	3,593	4,525	12,189
Pending	4,368	4,368	4,368
2020 Baseline	9,120	9,120	9,120

Legend:
- Projected Undersupply
- Capacity
- Pending
- 2020 Baseline
- 2044 Target

Scenario 1:
Lower Job, Housing Density

Scenario 2:
1 + Higher Job, Housing Density

Scenario 5:
2 + No Development Rate Reduction

HOUSING

Current Housing Units by TAZ (2020)

Total: 9,120

Scenario 1. Net New Housing Units by TAZ (2044)
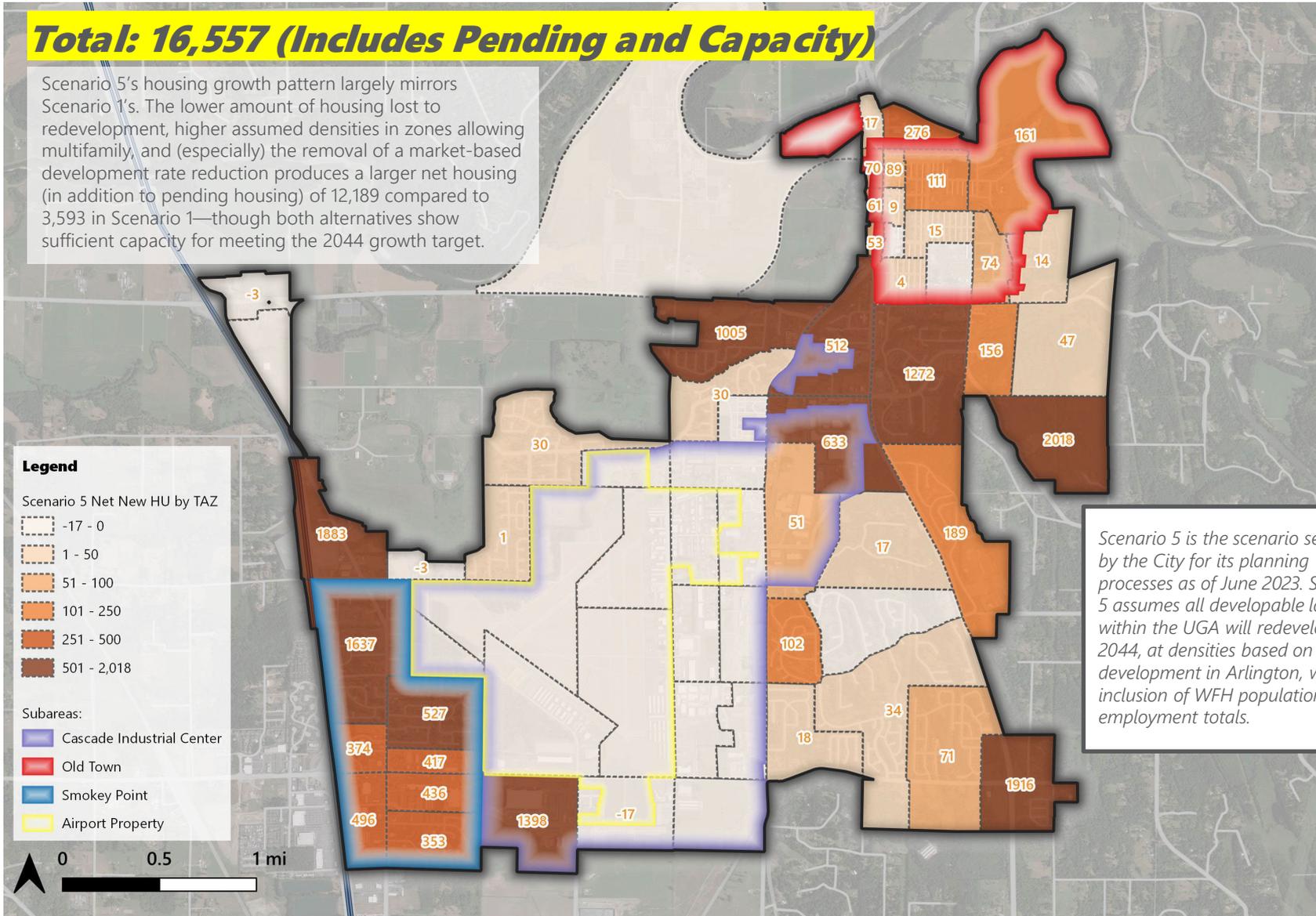
Total: 7,961 (Includes Pending and Capacity)

In Scenario 1, housing growth is focused in TAZ's with residential-zoned vacant and underutilized lands, including Smokey Point. This also includes the master-planned East Hill area and vacant/underutilized lands near the CIC, in an RHC-zoned area in the southeast of the city along SR-9, and the single-family zoned area between the CIC and Old Town along 67th Ave NE.

Legend

Scenario 1 Net New HU by TAZ
- -8 - 0
- 1 - 50
- 51 - 100
- 101 - 250
- 251 - 500
- 501 - 2,001

Subareas:
- Cascade Industrial Center
- Old Town
- Smokey Point
- Airport Property

Scenario 5. Net New Housing Units by TAZ (2044)

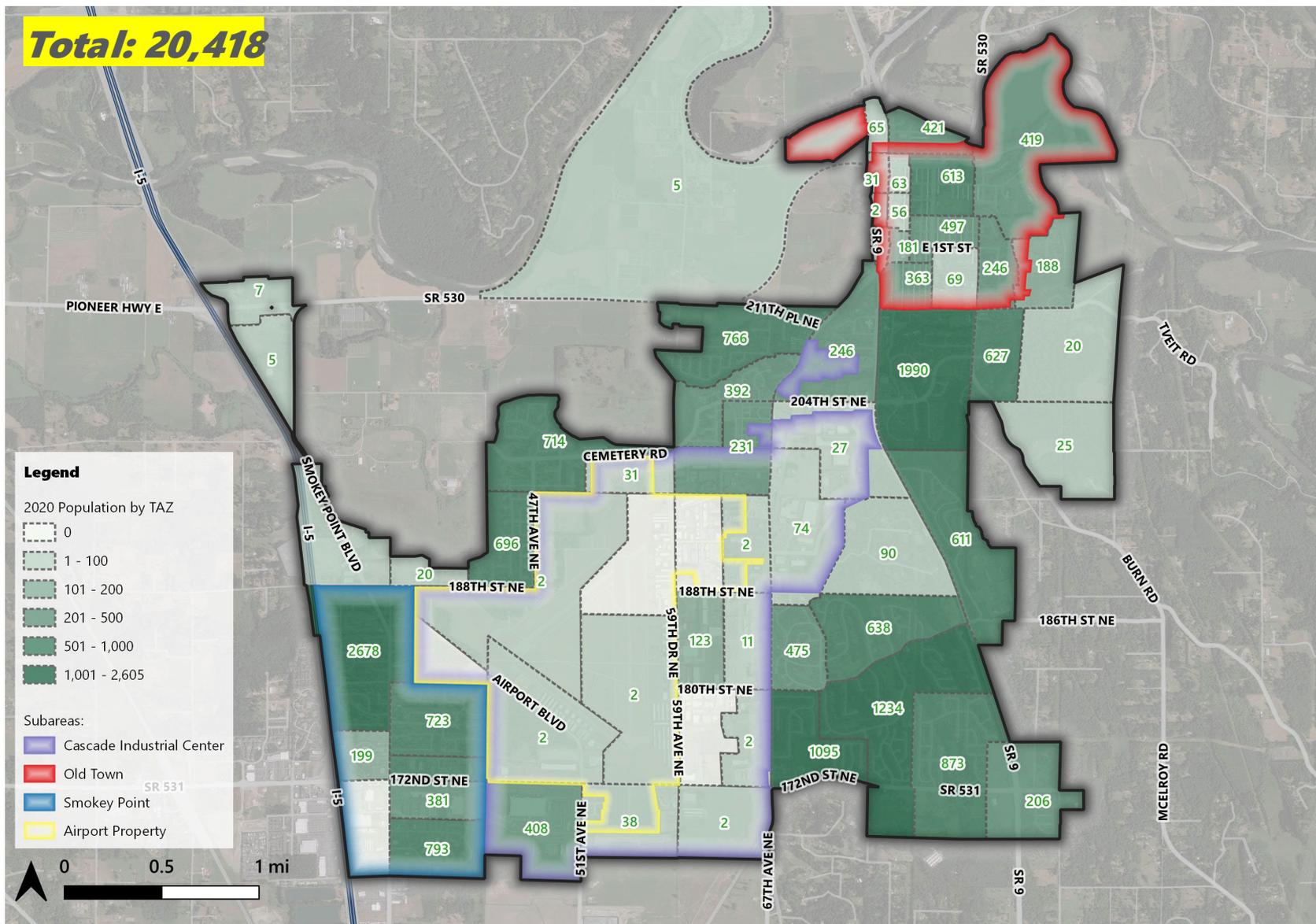

Total: 16,557 (Includes Pending and Capacity)

Scenario 5's housing growth pattern largely mirrors Scenario 1's. The lower amount of housing lost to redevelopment, higher assumed densities in zones allowing multifamily, and (especially) the removal of a market-based development rate reduction produces a larger net housing (in addition to pending housing) of 12,189 compared to 3,593 in Scenario 1—though both alternatives show sufficient capacity for meeting the 2044 growth target.

Legend

Scenario 5 Net New HU by TAZ
- -17 - 0
- 1 - 50
- 51 - 100
- 101 - 250
- 251 - 500
- 501 - 2,018

Subareas:
- Cascade Industrial Center
- Old Town
- Smokey Point
- Airport Property

Scenario 5 is the scenario selected by the City for its planning processes as of June 2023. Scenario 5 assumes all developable land within the UGA will redevelop by 2044, at densities based on recent development in Arlington, with the inclusion of WFH populations in employment totals.
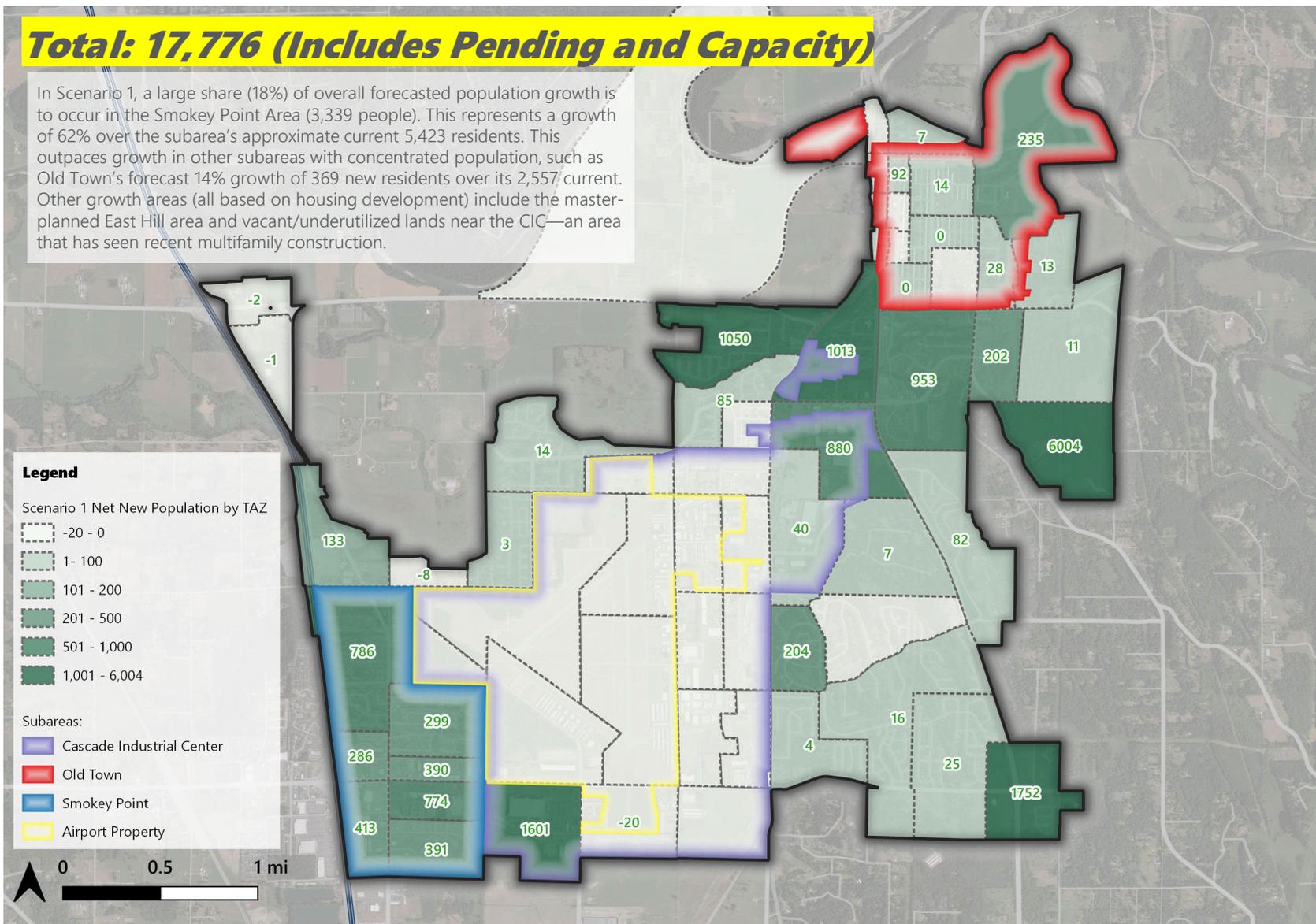
Current Population by TAZ (2020)

Total: 20,418

Legend

2020 Population by TAZ
- 0
- 1 - 100
- 101 - 200
- 201 - 500
- 501 - 1,000
- 1,001 - 2,605

Subareas:
- Cascade Industrial Center
- Old Town
- Smokey Point
- Airport Property

Scenario 1. Net New Population by TAZ (2044)

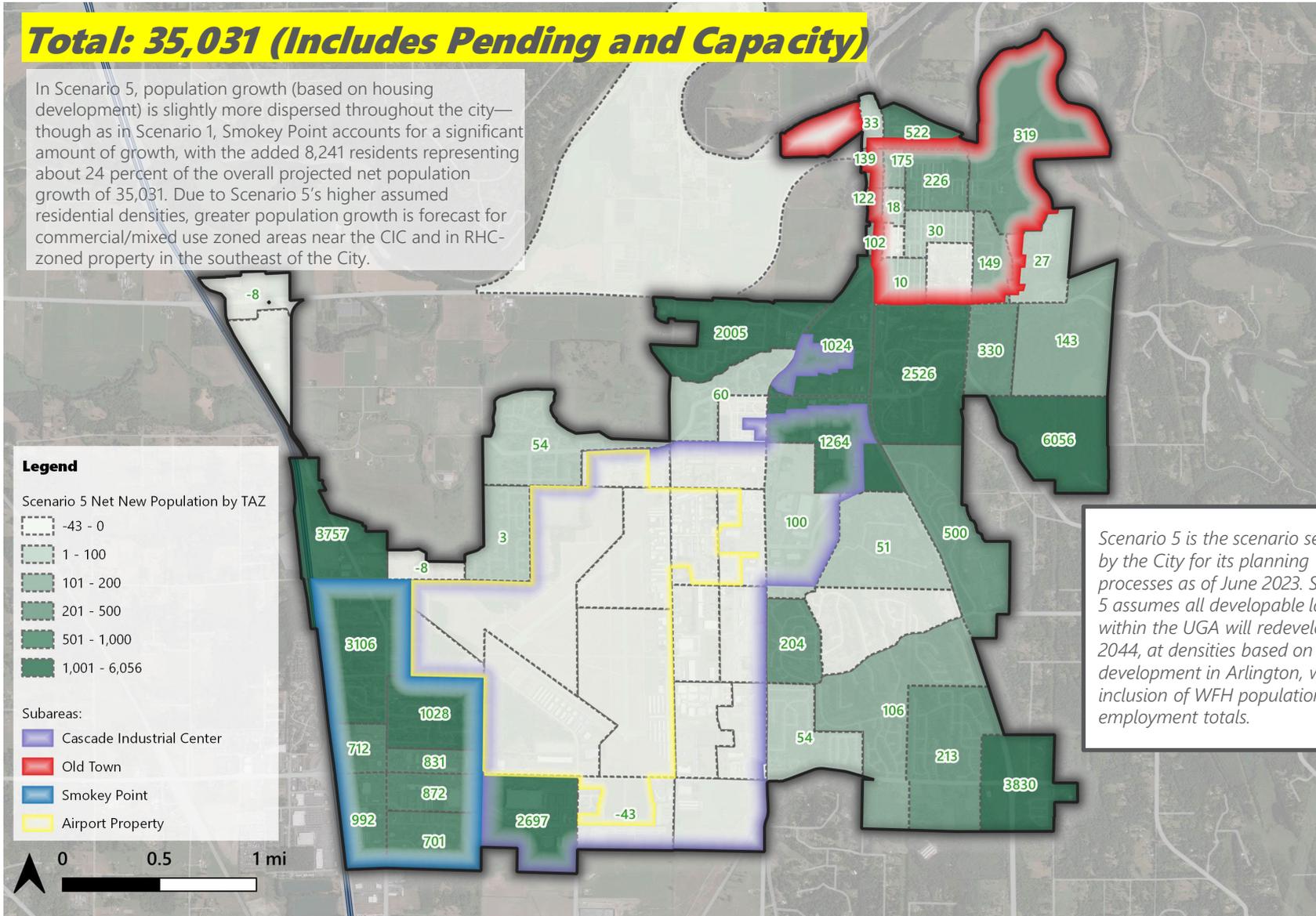**Total: 17,776 (Includes Pending and Capacity)**

In Scenario 1, a large share (18%) of overall forecasted population growth is to occur in the Smokey Point Area (3,339 people). This represents a growth of 62% over the subarea's approximate current 5,423 residents. This outpaces growth in other subareas with concentrated population, such as Old Town's forecast 14% growth of 369 new residents over its 2,557 current. Other growth areas (all based on housing development) include the master-planned East Hill area and vacant/underutilized lands near the CIC—an area that has seen recent multifamily construction.

Legend

Scenario 1 Net New Population by TAZ
- -20 - 0
- 1 - 100
- 101 - 200
- 201 - 500
- 501 - 1,000
- 1,001 - 6,004

Subareas:
- Cascade Industrial Center
- Old Town
- Smokey Point
- Airport Property

0   0.5   1 mi

Scenario 5. Net New Population by TAZ (2044)

Total: 35,031 (Includes Pending and Capacity)

In Scenario 5, population growth (based on housing development) is slightly more dispersed throughout the city—though as in Scenario 1, Smokey Point accounts for a significant amount of growth, with the added 8,241 residents representing about 24 percent of the overall projected net population growth of 35,031. Due to Scenario 5's higher assumed residential densities, greater population growth is forecast for commercial/mixed use zoned areas near the CIC and in RHC-zoned property in the southeast of the City.

Scenario 5 is the scenario selected by the City for its planning processes as of June 2023. Scenario 5 assumes all developable land within the UGA will redevelop by 2044, at densities based on recent development in Arlington, with the inclusion of WFH populations in employment totals.

Legend

Scenario 5 Net New Population by TAZ
- -43 - 0
- 1 - 100
- 101 - 200
- 201 - 500
- 501 - 1,000
- 1,001 - 6,056

Subareas:
- Cascade Industrial Center
- Old Town
- Smokey Point
- Airport Property

Conclusions

Key Takeaways

- Jobs

    - **Only under Scenario 5 does the City have enough land to accommodate future jobs targets, but this is an aggressive outlook on development,** which assumes a continuation of the current estimated work from home levels and that all developable land within the UGA will redevelop by 2044, regardless of market constraints observable in recent development.

    - Future land needs for (and densities of) employment depends on many factors, including what job types the market brings—either lower-density industrial jobs as seen in past and recent development, higher-density industrial employment in emerging industries, and/or increased employment in higher-density occupations such as healthcare.

- Housing + Population

    - **All forecasts show sufficient land for accommodating the 2044 housing and population targets.** Scenario 5 assumes all developable land within the UGA will redevelop by 2044, at densities based on recent development in Arlington.

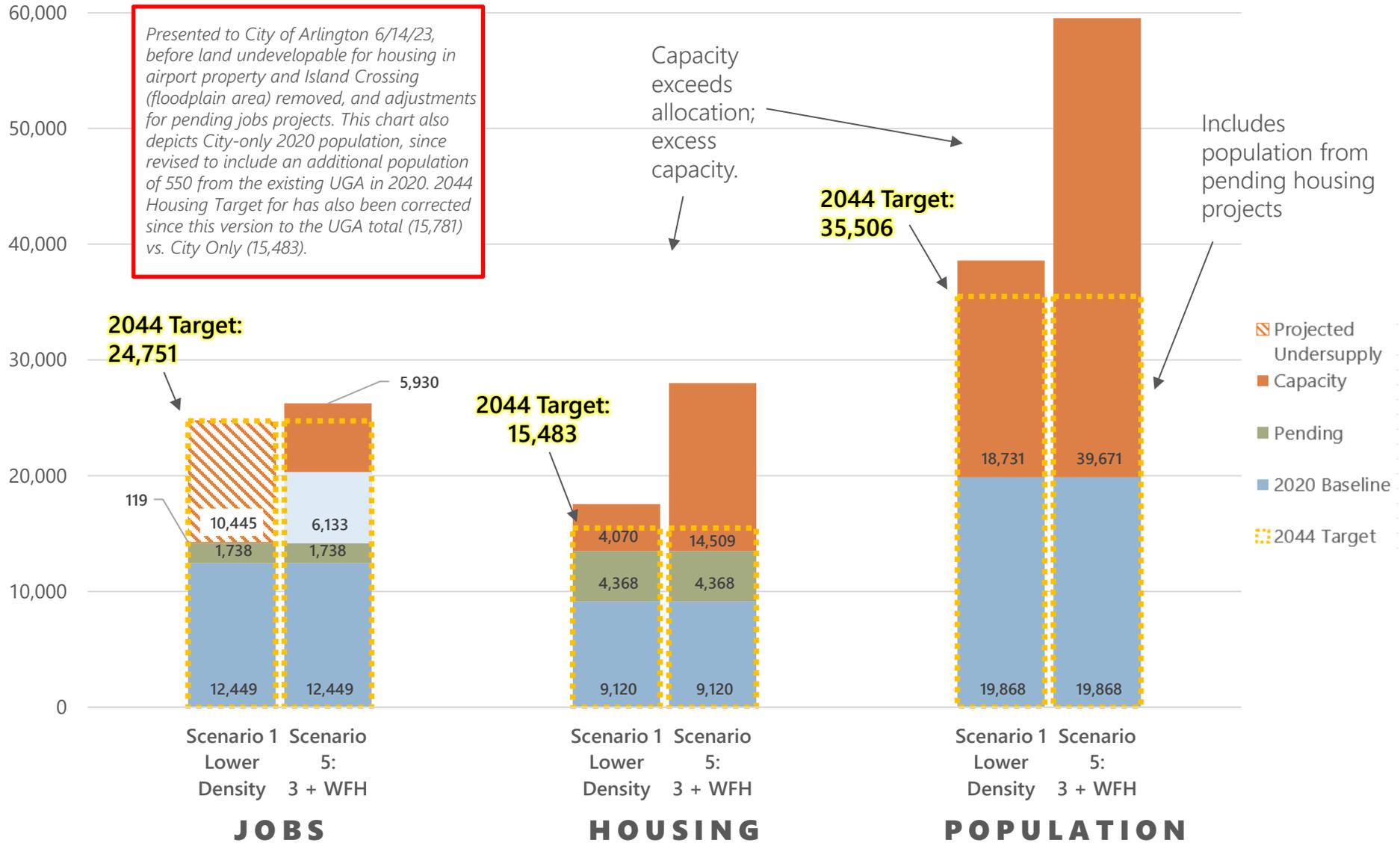# LELAND CONSULTING GROUP

People Places Prosperity

503.222.1600
www.lelandconsulting.com

Strategic Advisors to Public and Private Development

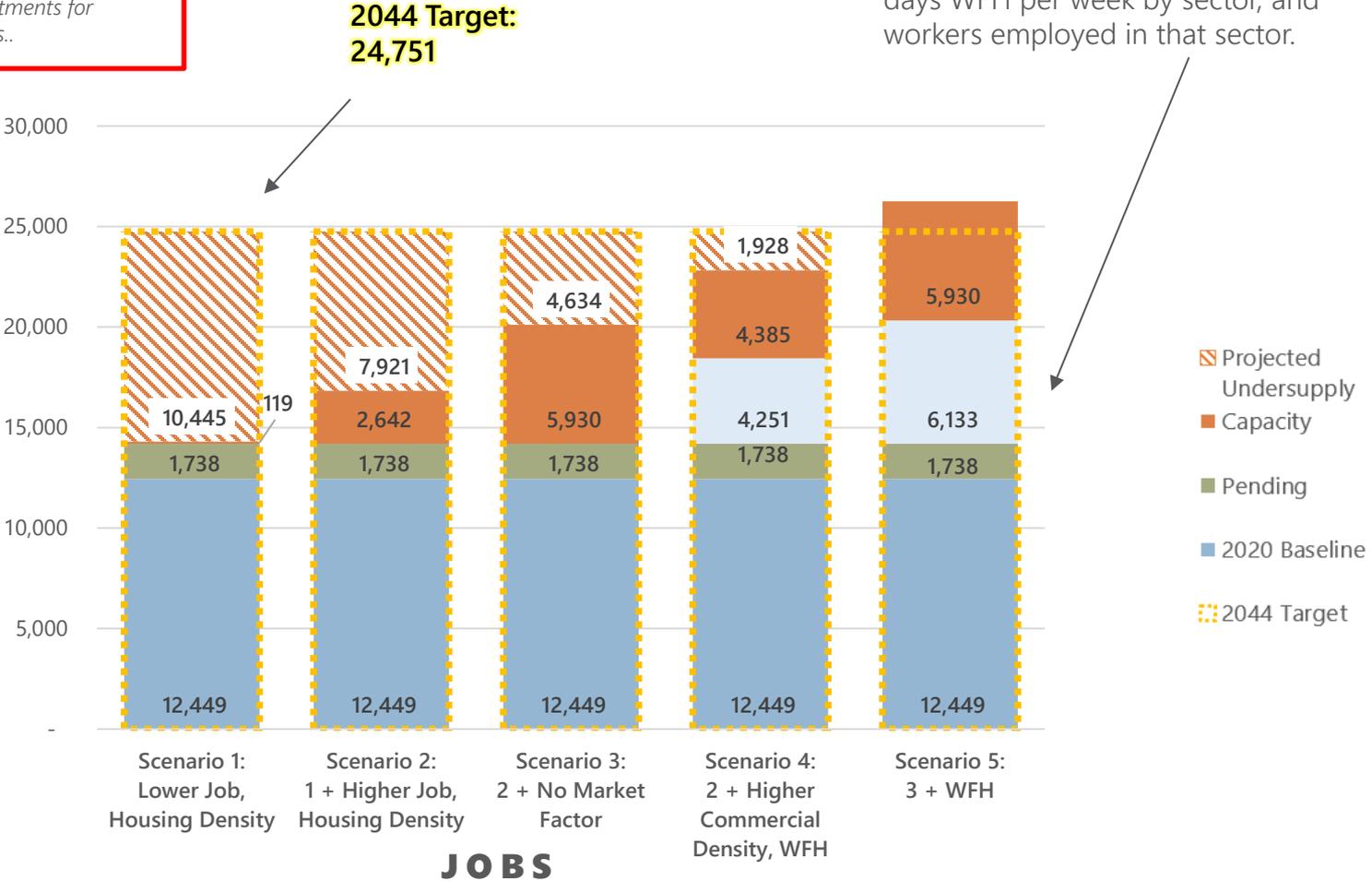# Forecast Charts and Maps Presented 6/14/23

Scenario 1, 5 Findings

Presented to City of Arlington 6/14/23, before land undevelopable for housing in airport property and Island Crossing (floodplain area) removed, and adjustments for pending jobs projects. This chart also depicts City-only 2020 population, since revised to include an additional population of 550 from the existing UGA in 2020. 2044 Housing Target for has also been corrected since this version to the UGA total (15,781) vs. City Only (15,483).

Capacity exceeds allocation; excess capacity.

Includes population from pending housing projects

2044 Target: 24,751

2044 Target: 15,483

2044 Target: 35,506

5,930

119

Legend:
- Projected Undersupply
- Capacity
- Pending
- 2020 Baseline
- 2044 Target

JOBS
- Scenario 1 Lower Density: 12,449 / 1,738 / 10,445
- Scenario 5: 3 + WFH: 12,449 / 1,738 / 6,133

HOUSING
- Scenario 1 Lower Density: 9,120 / 4,368 / 4,070
- Scenario 5: 3 + WFH: 9,120 / 4,368 / 14,509

POPULATION
- Scenario 1 Lower Density: 19,868 / 18,731
- Scenario 5: 3 + WFH: 19,868 / 39,671

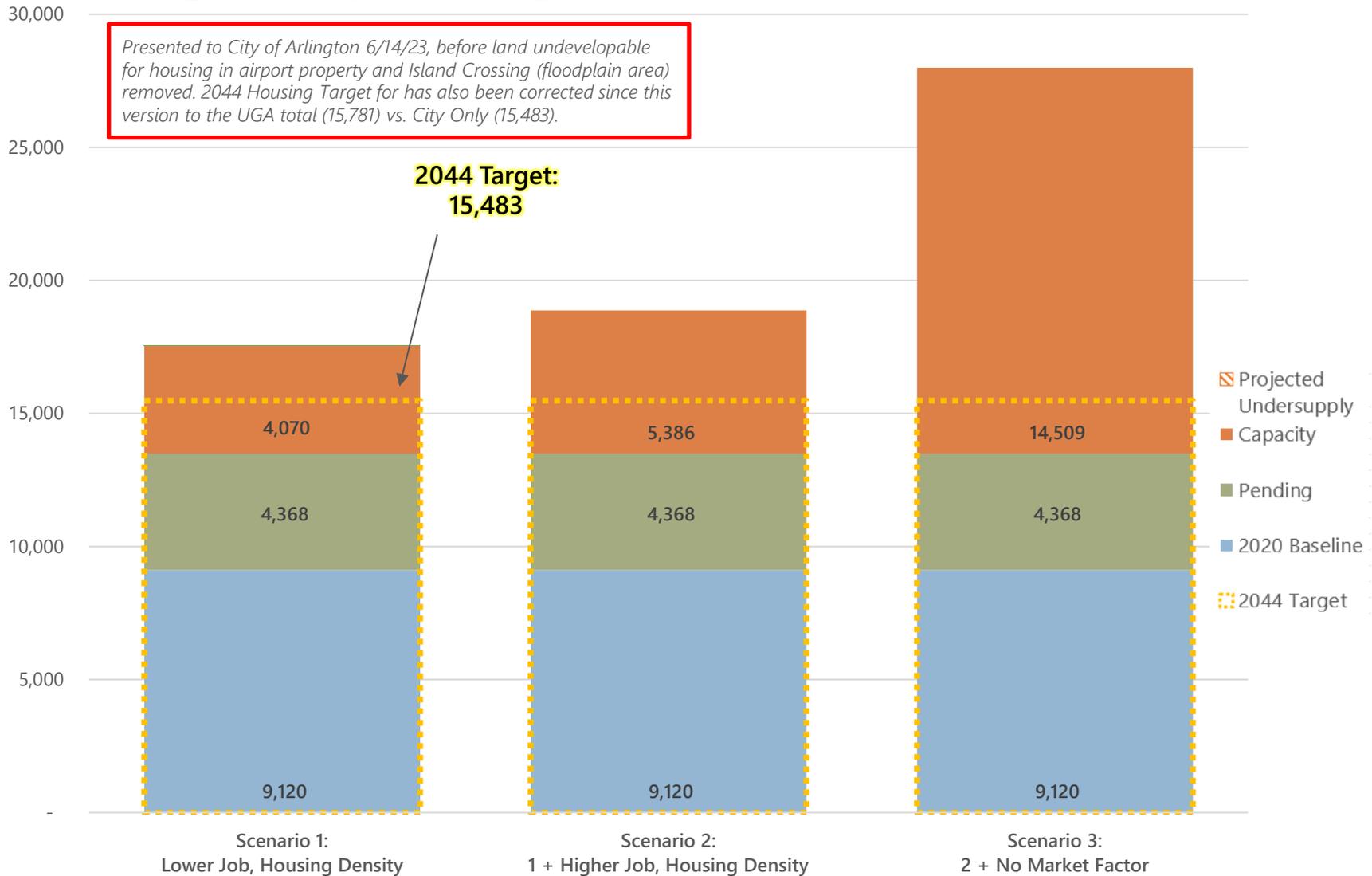Sources: OFM, BLR, City data, CCP Targets, Snohomish County PAC Working Group, LCG Analysis.

Job Capacity (2044)

Presented to City of Arlington 6/14/23, before land undevelopable for housing in airport property and Island Crossing (floodplain area) removed , and adjustments for pending jobs projects..

2044 Target: 24,751

Work from home estimate: 10.3% * 2044 population. LCG methodology calculates WFH population based on estimated days WFH per week by sector, and workers employed in that sector.

Legend:
- Projected Undersupply
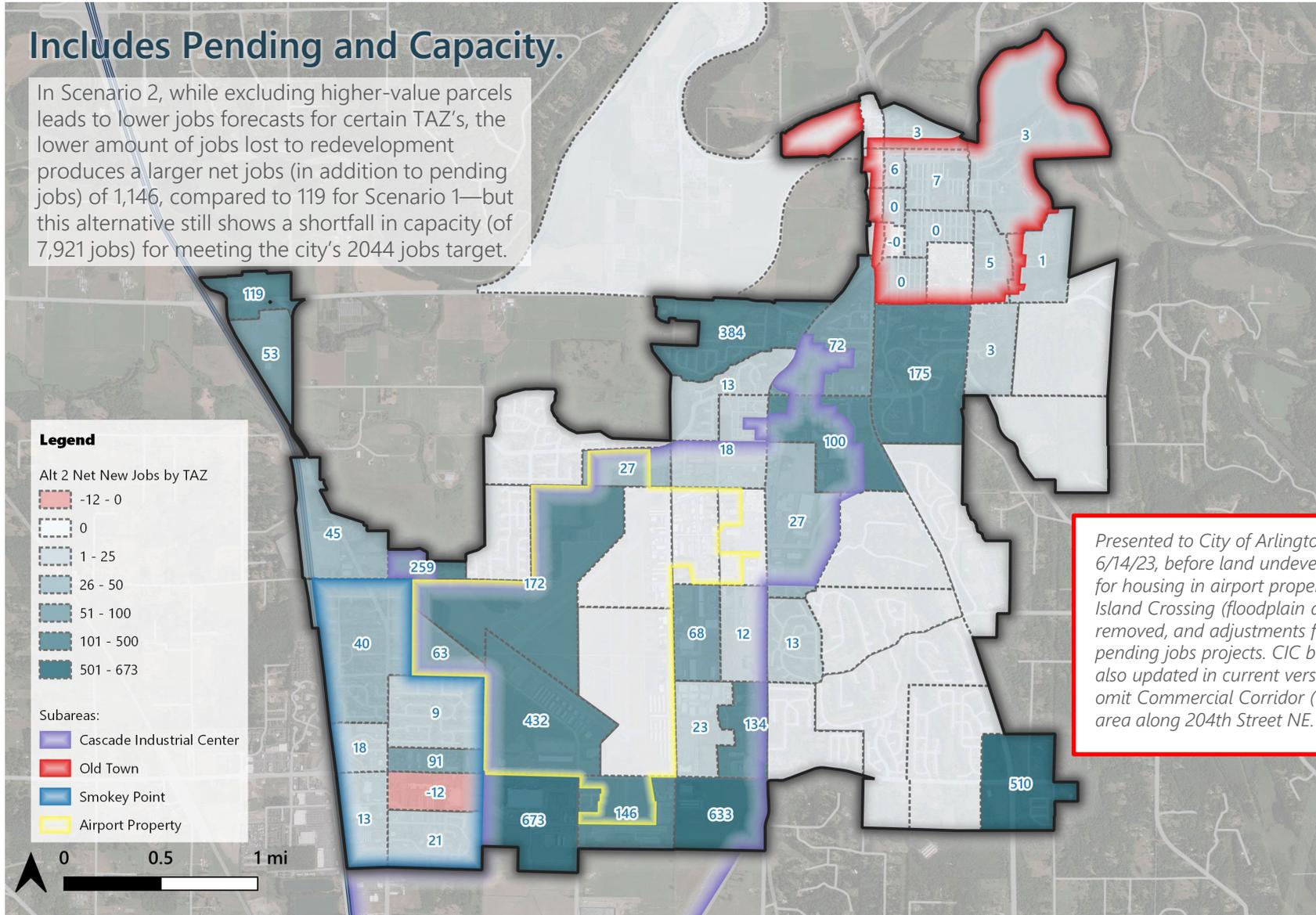- Capacity
- Pending
- 2020 Baseline
- 2044 Target

	Scenario 1: Lower Job, Housing Density	Scenario 2: 1 + Higher Job, Housing Density	Scenario 3: 2 + No Market Factor	Scenario 4: 2 + Higher Commercial Density, WFH	Scenario 5: 3 + WFH
Projected Undersupply	10,445	7,921	4,634	1,928	
Capacity	119	2,642	5,930	4,385	5,930
(extra)				4,251	6,133
Pending	1,738	1,738	1,738	1,738	1,738
2020 Baseline	12,449	12,449	12,449	12,449	12,449

JOBS

Housing Capacity (2044)

Presented to City of Arlington 6/14/23, before land undevelopable for housing in airport property and Island Crossing (floodplain area) removed. 2044 Housing Target for has also been corrected since this version to the UGA total (15,781) vs. City Only (15,483).

2044 Target: 15,483

	Scenario 1: Lower Job, Housing Density	Scenario 2: 1 + Higher Job, Housing Density	Scenario 3: 2 + No Market Factor
Capacity	4,070	5,386	14,509
Pending	4,368	4,368	4,368
2020 Baseline	9,120	9,120	9,120

Legend:
- Projected Undersupply
- Capacity
- Pending
- 2020 Baseline
- 2044 Target

HOUSING

Scenario 2. Net New Jobs Units by TAZ (2044)

Includes Pending and Capacity.

In Scenario 2, while excluding higher-value parcels leads to lower jobs forecasts for certain TAZ's, the lower amount of jobs lost to redevelopment produces a larger net jobs (in addition to pending jobs) of 1,146, compared to 119 for Scenario 1—but this alternative still shows a shortfall in capacity (of 7,921 jobs) for meeting the city's 2044 jobs target.


Legend

Alt 2 Net New Jobs by TAZ
- -12 – 0
- 0
- 1 – 25
- 26 – 50
- 51 – 100
- 101 – 500
- 501 – 673

Subareas:
- Cascade Industrial Center
- Old Town
- Smokey Point
- Airport Property

Presented to City of Arlington 6/14/23, before land undevelopable for housing in airport property and Island Crossing (floodplain area) removed, and adjustments for pending jobs projects. CIC boundary also updated in current version to omit Commercial Corridor (CC) zone area along 204th Street NE.

Scenario 1. Net New Housing Units by TAZ (2044)

Includes Pending and Capacity.

In Scenario 1, housing growth is focused in TAZ's with residential-zoned vacant and underutilized lands, including Smokey Point. This also includes the master-planned East Hill area and vacant/underutilized lands near the CIC, in an RHC-zoned area in the southeast of the city, and a single-family zoned area between the CIC and Old Town.
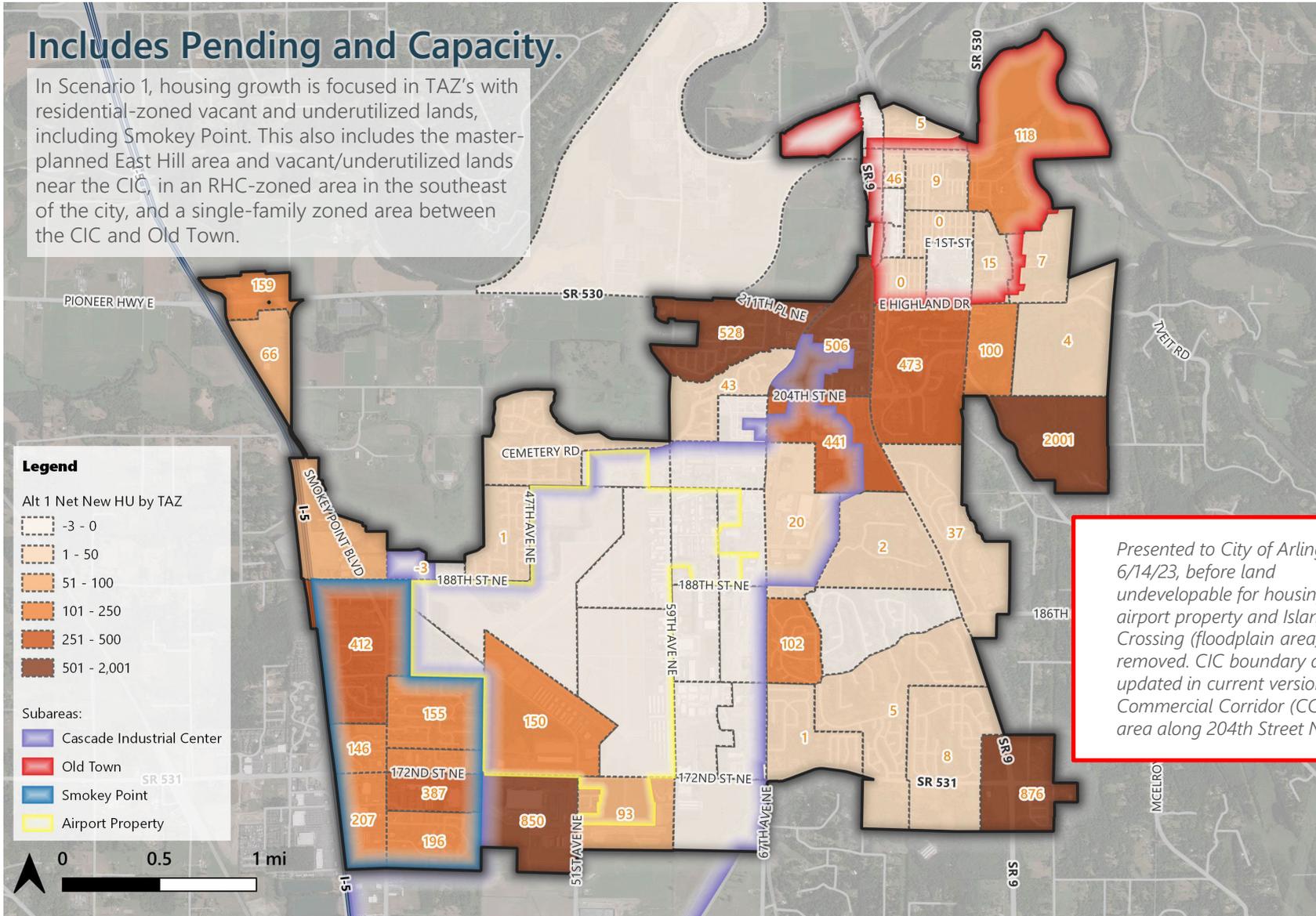

Presented to City of Arlington 6/14/23, before land undevelopable for housing in airport property and Island Crossing (floodplain area) removed. CIC boundary also updated in current version to omit Commercial Corridor (CC) zone area along 204th Street NE.

Legend

Alt 1 Net New HU by TAZ

- -3 - 0
- 1 - 50
- 51 - 100
- 101 - 250
- 251 - 500
- 501 - 2,001

Subareas:

- Cascade Industrial Center
- Old Town
- Smokey Point
- Airport Property

Scenario 2. Net New Housing Units by TAZ (2044)
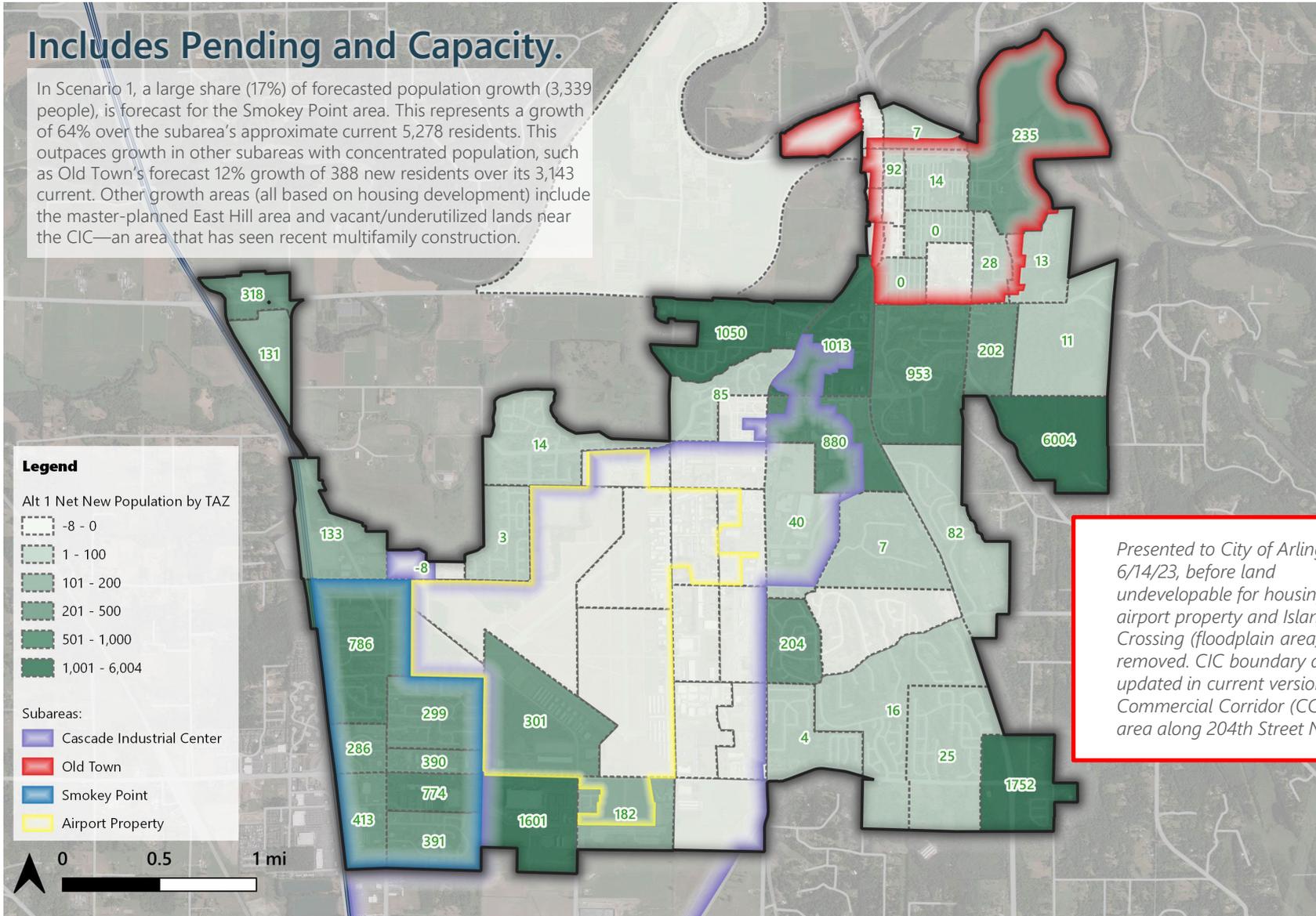

Includes Pending and Capacity.

Scenario 2's housing growth pattern largely mirrors Scenario 1's. While excluding higher-value parcels leads to lower housing forecasts for certain TAZ's (e.g., in Smokey Point), the lower amount of housing lost to redevelopment and higher assumed densities in zones allowing multifamily produces a larger net housing (in addition to pending housing) of 5,386 compared to 4,070 in Scenario 1—though both alternatives show sufficient capacity for meeting the 2044 growth target.

Legend

Alt 1 Net New HU by TAZ

- -3 – 0
- 1 – 50
- 51 – 100
- 101 – 250
- 251 – 500
- 501 – 2,001

Subareas:

- Cascade Industrial Center
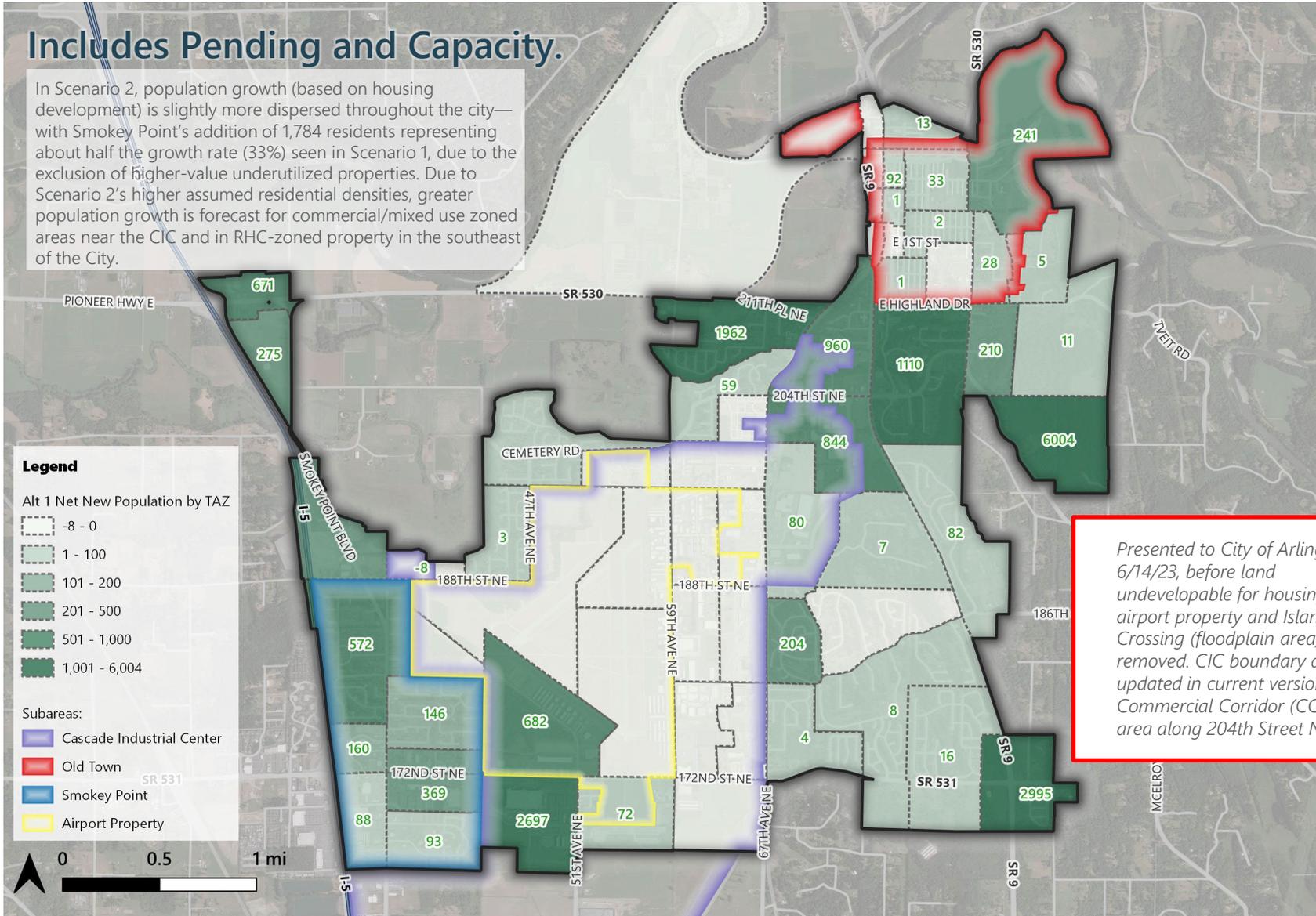- Old Town
- Smokey Point
- Airport Property

Presented to City of Arlington 6/14/23, before land undevelopable for housing in airport property and Island Crossing (floodplain area) removed. CIC boundary also updated in current version to omit Commercial Corridor (CC) zone area along 204th Street NE.
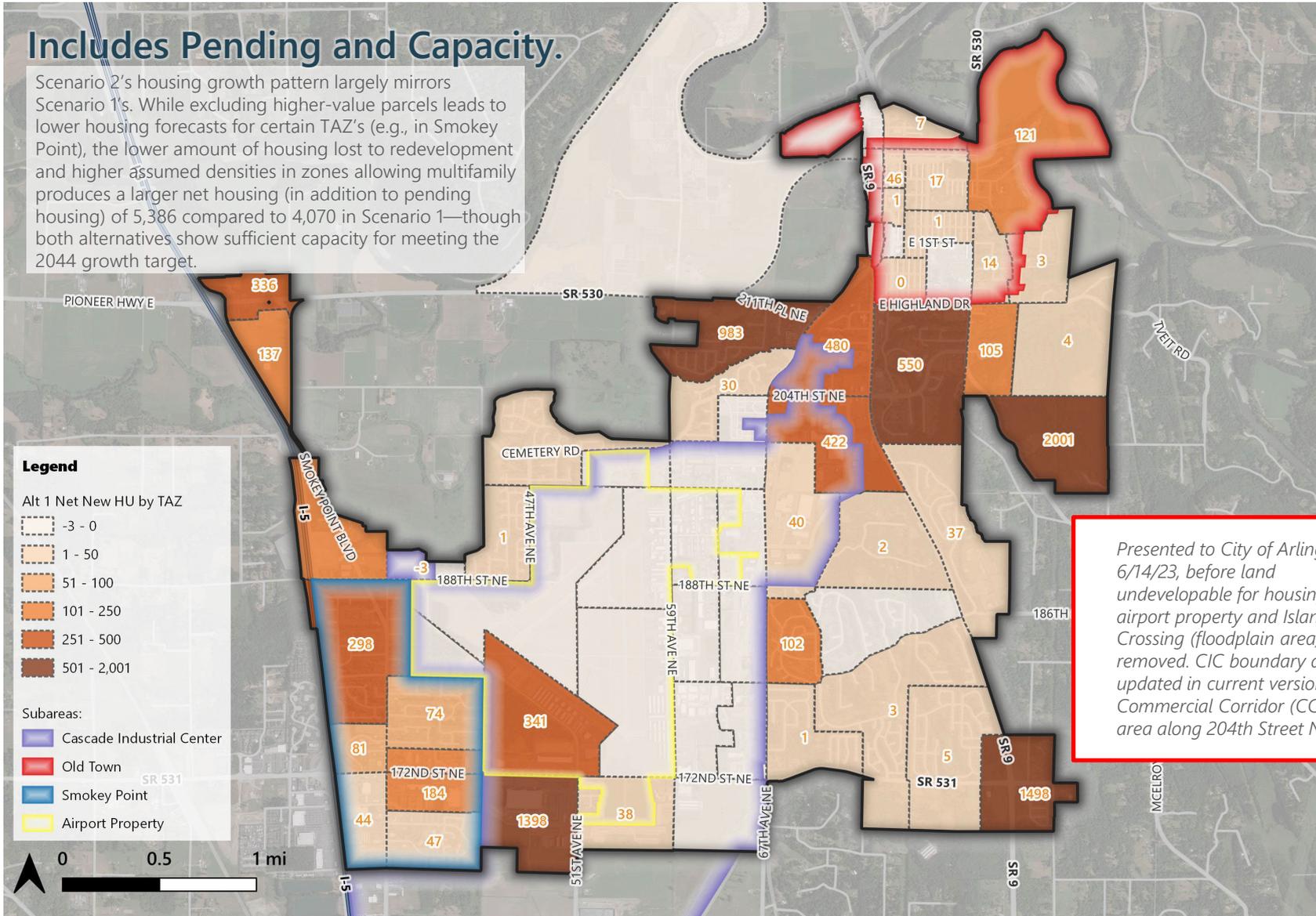
Scenario 1. Net New Population by TAZ (2044)

Includes Pending and Capacity.

In Scenario 1, a large share (17%) of forecasted population growth (3,339 people), is forecast for the Smokey Point area. This represents a growth of 64% over the subarea's approximate current 5,278 residents. This outpaces growth in other subareas with concentrated population, such as Old Town's forecast 12% growth of 388 new residents over its 3,143 current. Other growth areas (all based on housing development) include the master-planned East Hill area and vacant/underutilized lands near the CIC—an area that has seen recent multifamily construction.

Legend

Alt 1 Net New Population by TAZ

- -8 – 0
- 1 – 100
- 101 – 200
- 201 – 500
- 501 – 1,000
- 1,001 – 6,004

Subareas:

- Cascade Industrial Center
- Old Town
- Smokey Point
- Airport Property

Presented to City of Arlington 6/14/23, before land undevelopable for housing in airport property and Island Crossing (floodplain area) removed. CIC boundary also updated in current version to omit Commercial Corridor (CC) zone area along 204th Street NE.

Scenario 2. Net New Population by TAZ (2044)

Includes Pending and Capacity.

In Scenario 2, population growth (based on housing development) is slightly more dispersed throughout the city—with Smokey Point's addition of 1,784 residents representing about half the growth rate (33%) seen in Scenario 1, due to the exclusion of higher-value underutilized properties. Due to Scenario 2's higher assumed residential densities, greater population growth is forecast for commercial/mixed use zoned areas near the CIC and in RHC-zoned property in the southeast of the City.

Presented to City of Arlington 6/14/23, before land undevelopable for housing in airport property and Island Crossing (floodplain area) removed. CIC boundary also updated in current version to omit Commercial Corridor (CC) zone area along 204th Street NE.

Legend

Alt 1 Net New Population by TAZ

- -8 – 0
- 1 – 100
- 101 – 200
- 201 – 500
- 501 – 1,000
- 1,001 – 6,004

Subareas:

- Cascade Industrial Center
- Old Town
- Smokey Point
- Airport Property

0   0.5   1 mi

Additional Slides/ Appendices

Employment Capacity Results

	Scenario 1 Gross Buildable Acres V & UU*	Scenario 2 Gross Buildable Acres V & UU*	Scenario 1 New Jobs	Scenario 2 New Jobs	Scenario 1 Jobs Lost Redev.	Scenario 2 Jobs Lost Redev.	Scenario 1 Net New Jobs	Scenario 2 Net New Jobs
Multi-Family								
Residential High Capacity	0	54	0	708	0	4	0	704
Commercial / Mixed Use								
NC (Neighborhood Commercial)	13	5	32	64	42	0	-10	64
OTBD - 1 (Old Town Business District)	1	1	0	14	0	3	0	11
OTBD - 2	10	7	0	109	0	115	0	-6
OTBD - 3	18	10	0	170	0	62	0	108
GC (General Commercial)	148	114	474	1509	440	33	34	1476
HC (includes HC-N BLR acres)	179	92	144	1217	515	389	-371	828
BP (Business Park)	11	11	129	259	0	0	129	259
CC (Commercial Corridor)	214	142	47	1874	73	269	-26	1605
Medical Services	0	0	0	0	0	0	0	0
Subtotal	**593**	**381**	**827**	**5,216**	**1,070**	**871**	**-243**	**4345**
Industrial								
LI (Light Industrial)	142	135	324	677	61	11	263	666
GI (General Industrial)	43	43	100	215	0	0	100	215
Subtotal	**185**	**178**	**424**	**892**	**61**	**11**	**363**	**881**
Total:	**778**	**613**	**1,250**	**6,816**	**1,131**	**886**	**119**	**5,930**

*From City's layer of vacant and underutilized parcels.

Assumption Details

Commercial Rentable Building Area/Acre is the amount of commercial rentable area that will be developed per acre of commercial and mixed-use zoned land. LCG estimates are based on typical FARs and averages for recent developments using CoStar data (see next slides).

The **SF per Job** assumption of 500 is based on averages for recent projects provided by the City; 400 for past development in OTBD, and 2,000 for WTU/industrial provided by the City.

Development Rate is the % of vacant and underutilized parcel acreage expected to develop or redevelop during the study timeframe. LCG estimates are based on historic growth patterns by zone.

Note: new changes to assumptions in yellow.

	% Residential	% Commercial	% Industrial	Development Rate (Scenarios 1, 2, 4)	Scenario 1 Commercial RBA/Acre	Scenario 1 SF per Job	Scenario 1 Du/Acre	Scenario 2 Commercial RBA/Acre	Scenario 2 SF per Job	Scenario 2 Du/Acre
Multi-Family										
Residential High Capacity	70	30	0	19%	3,200	0	17	4,000	500	34
Commercial / Mixed Use										
Neighborhood Commercial	70	30	0	80%	3,200	1,000	15	4,000	500	34
Old Town Business District - 1	70	30	0	7%	3,200	400	0	4,000	400	34
Old Town Business District - 2	70	30	0	0%	3,200	400	0	4,000	400	34
Old Town Business District - 3	70	30	0	0%	3,200	400	0	4,000	400	34
General Commercial	70	30	0	100%	3,200	1,000	15	4,000	500	34
Highway Commercial	70	30	0	25%	3,200	1,000	15	4,000	500	34
Business Park	0	100	0	100%	12,000	1,000	0	12,000	500	0
Commercial Corridor District	70	30	0	7%	3,200	1,000	15	4,000	500	34
Medical Services	70	30	0	0%	3,200	1,000	0	4,000	500	0
Industrial										
Light Industrial	0	0	100	46%	10,000	2,000	0	10,000	2,000	0
General Industrial	0	0	100	46%	10,000	2,000	0	10,000	2,000	0

Comm. Rentable Building Area/Ac Calculation

Vacant and Underutilized Acres in Commercial/Mixed Use Zones:	593	
Area that will redevelop as:		
Commercial	30%	*Based on development last 10 years in Commercial &*
Multifamily	70%	*Mixed Use Zones*
Future Development Type (Acres):		
Commercial	178	
Mixed-Use/Multifamily	415	
Assumed Commercial Rentable Building Area/Acre:		
Commercial	12,197	*FAR 0.28 * 43,560 (SF in Acre)*
Mixed-Use/Multifamily	4,084	*Avg for developments last 10 years*
Total Commercial Rentable Building Area:		
Commercial	2,169,846	
Mixed-Use/Multifamily	1,695,268	
Total	3,865,115	
Avg Commercial Rentable Building Area/Acre:	6,600	

Multifamily and Mixed Use Projects

Arlington Multifamily Projects, 2012-2022

Project	Year Built	Units	DU/Acre	Commercial Rentable Building Area	Rentable Building Area per Acre	Acres
Cedar Pointe	2020	256	63	0	0	4.05
Emory Lofts	2019	40	58	21000	30435	0.69
Fullwiler	2023	29	50	2755	4750	0.58
Affinity at Arlington	2020	171	48	0	0	3.54
Bridge Place	2014	8	47	0	0	0.17
Pilchuck Village	2022	181	46	18721	4788	3.91
Stillaguamish Gardens	2014	30	38	0	0	0.8
Centennial Park	2021	202	23	7655	869	8.81
Park77	2017	182	23	0	0	8.02
Villas at Arlington	2019	312	21	0	0	14.71
Average			**42**	**5,013**	**4,084**	**4.528**

What amount of land is needed to accommodate undersupply (Scenario 5)?

Employees per acre assumptions in WA + OR:

Jurisdiction	Commercial EPA	Industrial EPA
Clark Co., WA (2015)	20	9
Island Co., WA (2016)	17	8
Thurston Co., WA (2014)	3.3	1.5
Tualatin, OR (2017)	27	15
McMinnville, OR (2017)	23	10
Redmond, OR (2018)	11-18	8

Source: ECONorthwest, Employment Density Assumptions in Clark Co. Vacant Buildable Lands Model.

Projected Jobs Undersupply	4,634	4,634	4,634
Future Land Use Pattern	Mostly Office and Retail	Mix of Commercial and MFR	Historical Pattern MFR, Com, Ind Land
RBA/Acre	12,000	4,000	
SF/Job	500	500	
Jobs/Acre	24	8	1.6
GBA Parcel Acres required to meet the 2044 jobs shortfall	193	579	2,884
Gross Acres required to meet the 2044 jobs shortfall*	261	782	3,893

Scenario 1 New Jobs per buildable acre

*Assumes 35% of land for roads, critical areas, buffers, easements, and other undevelopable uses.

What amount of land is needed to accommodate undersupply?
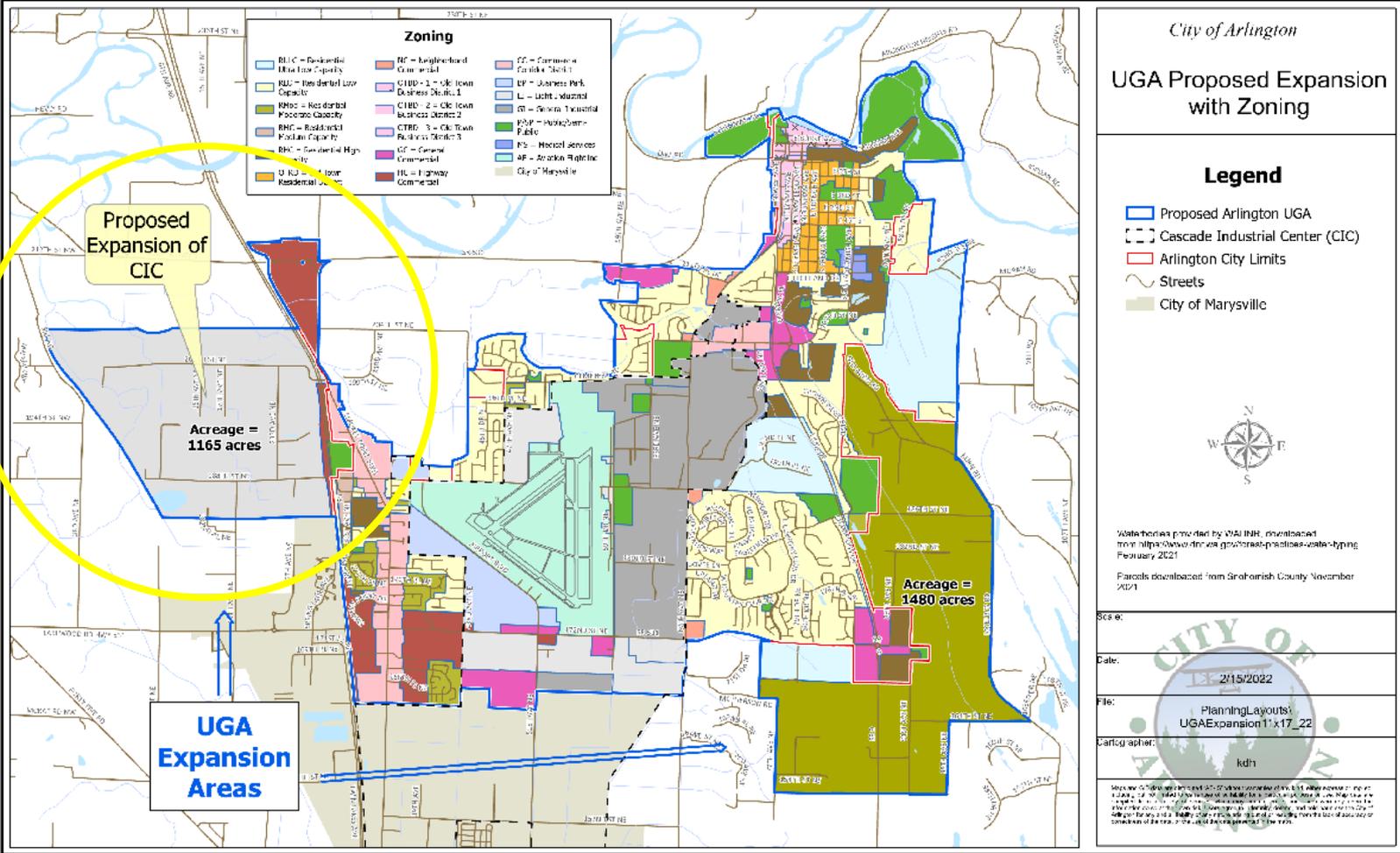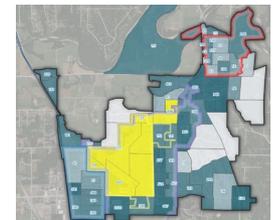
Future Employment Density

Scenario 2 2044 Total Jobs by TAZ
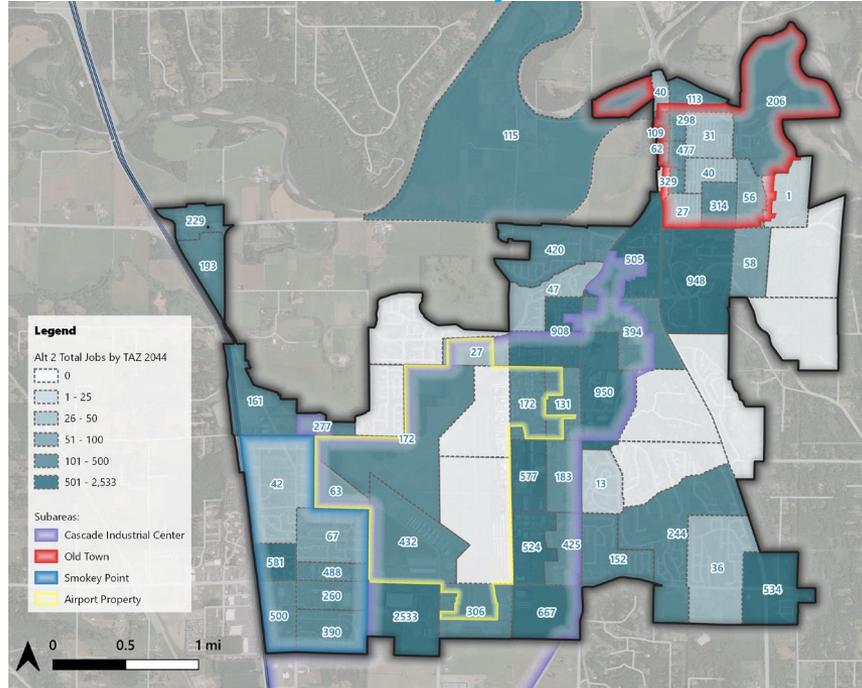
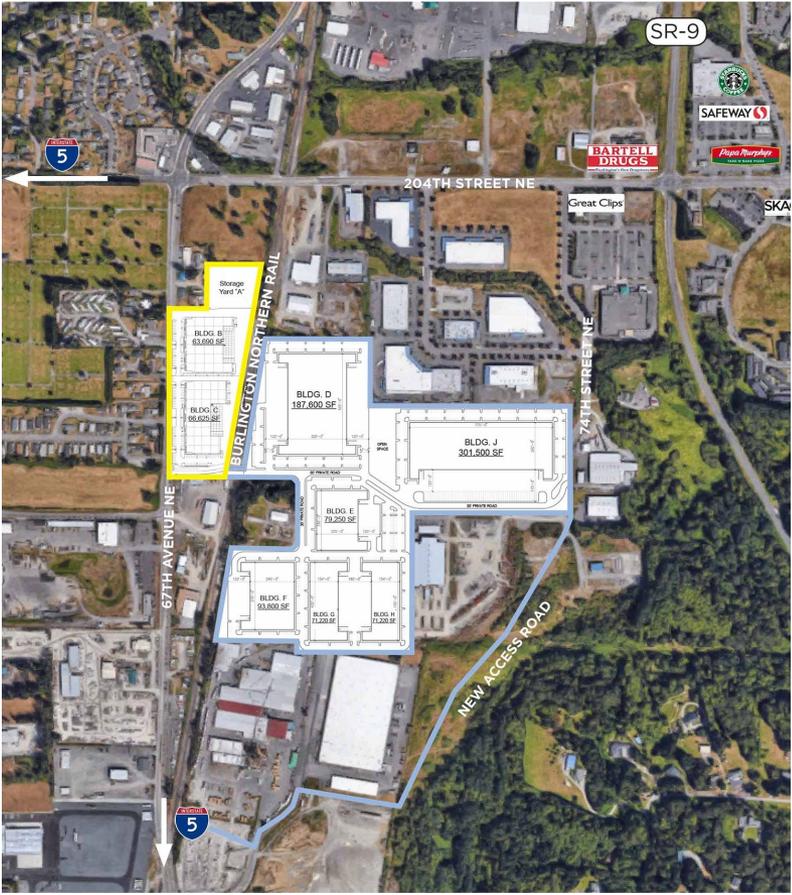PSRC LUV-IT Model 2044 Total Jobs by TAZ
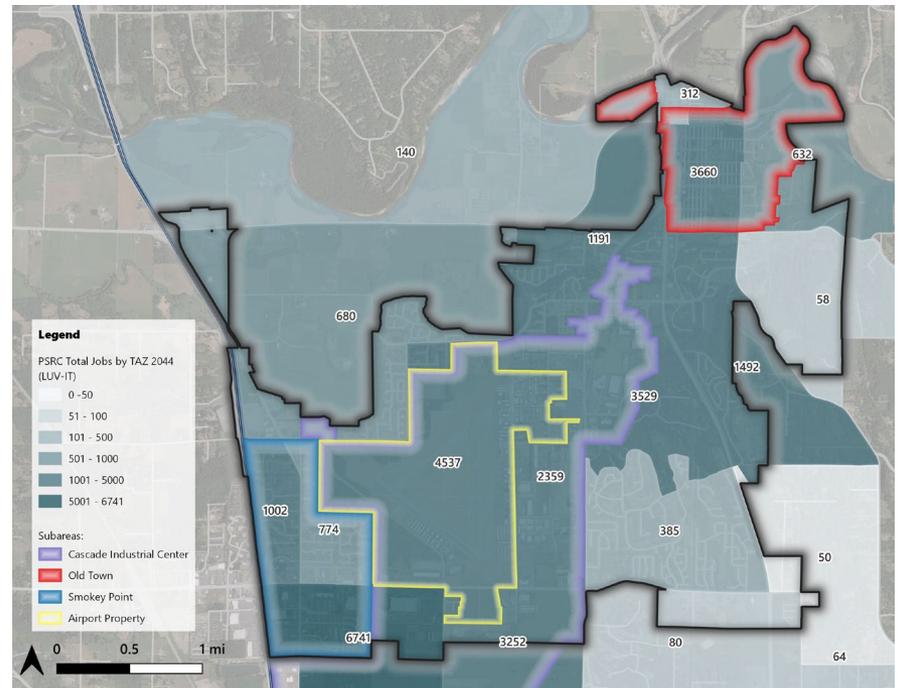
vs. 1,601 jobs in Scenario 2

Gayteway Business Park

20015 67th Avenue NE
1 million SF industrial & manufacturing
18,519 units per acre
Built 2022

Smokey Point Medical Center

3823 172nd Street NE
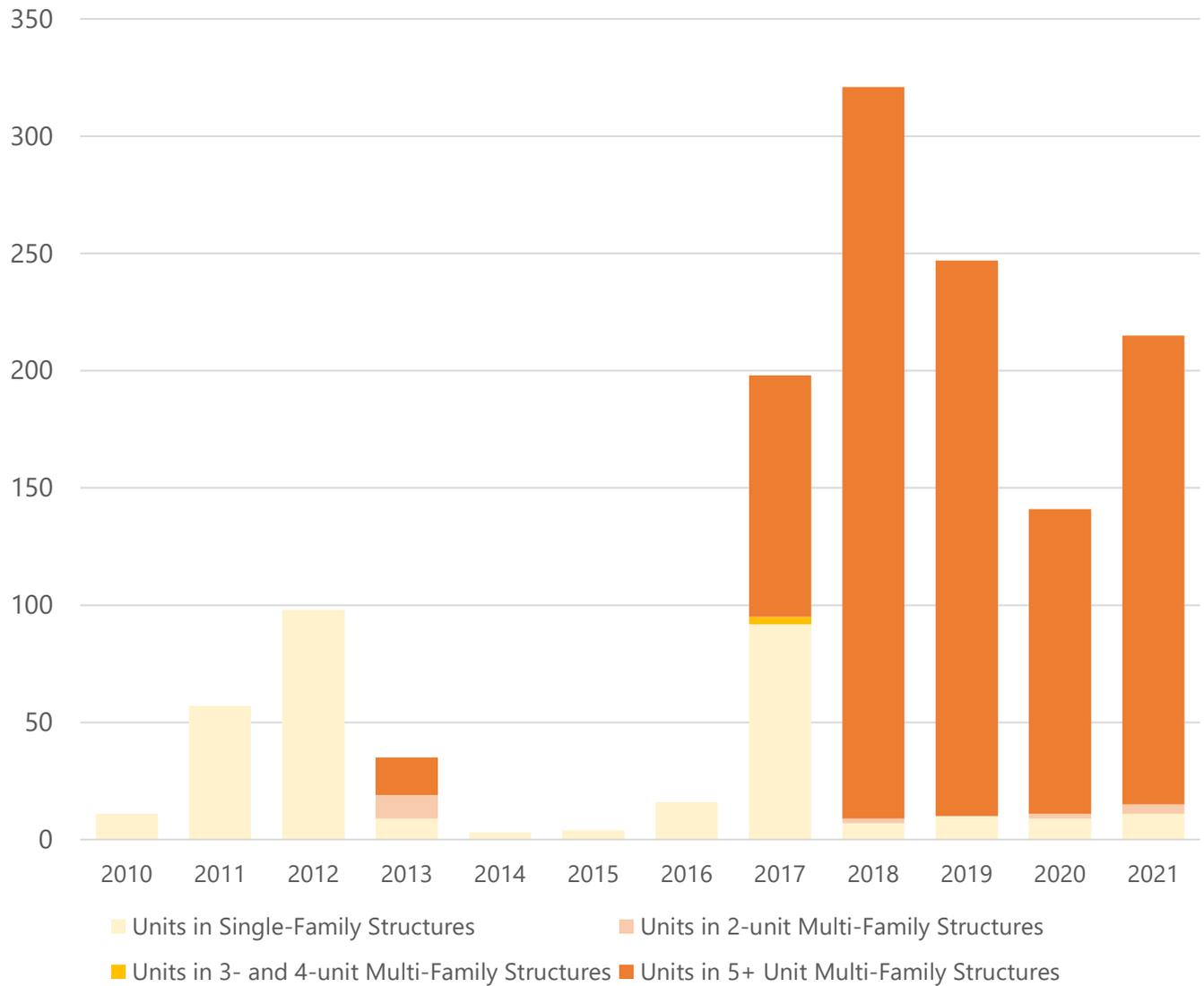41,915 SF; Built 2012
8,843 SF/acre

Residential, Population Density Assumptions

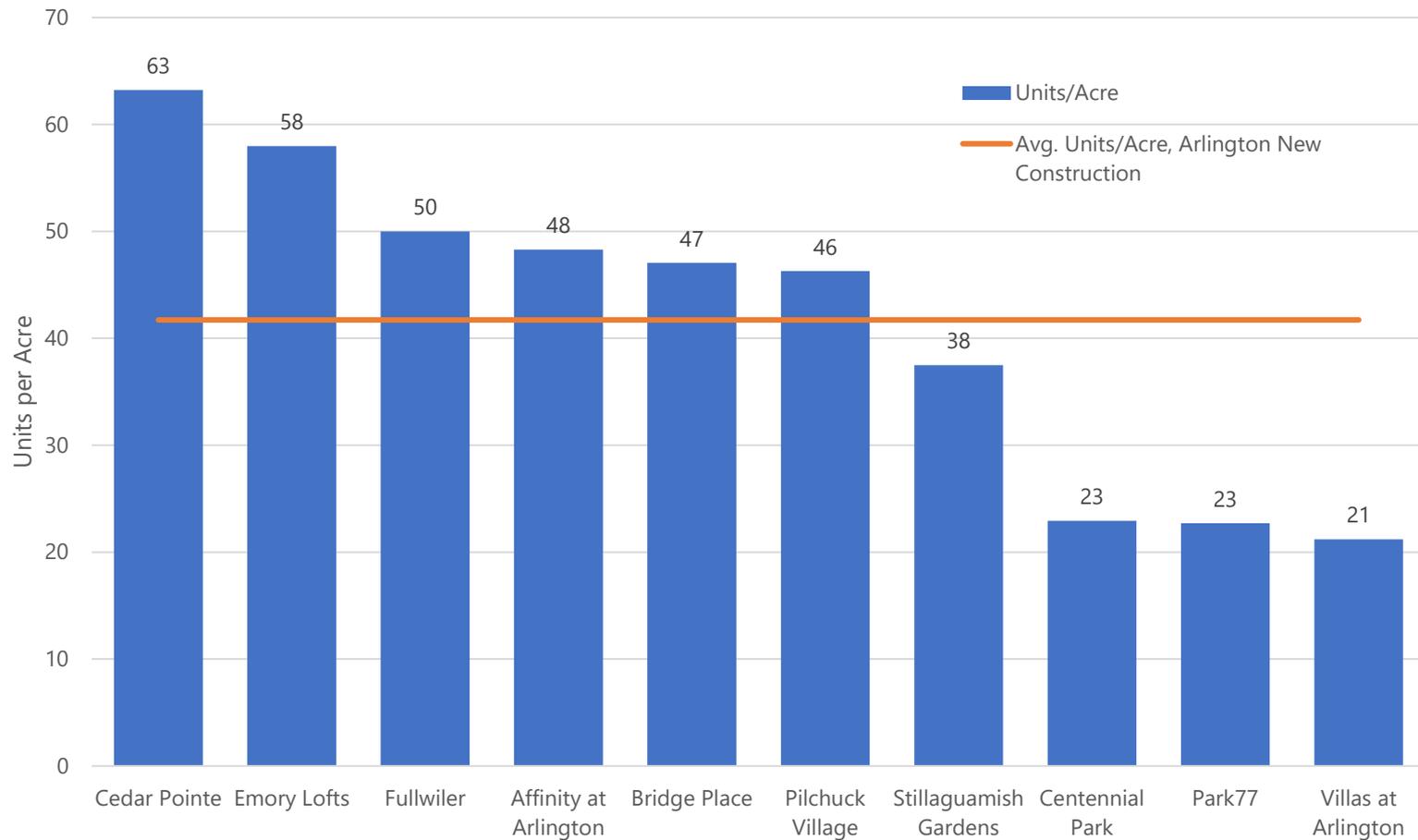|	Scenario 1		Scenario 2		
	Residential Du/Ac	People per HH	Residential Du/Ac	People per HH	Development Rate (same as in jobs calcs)
Single-Family					
Residential Ultra Low Capacity	3	3.00	3	3.00	8%
Residential Low Capacity	5	3.00	5	3.00	8%
Old Town Residential District	7	3.00	7	3.00	8%
Multi-Family					
Residential Moderate Capacity	10	2.00	10	2.00	19%
Residential Medium Capacity	12	2.00	12	2.00	19%
Residential High Capacity	17	2.00	34	2.00	19%
Commercial / Mixed Use					
Neighborhood Commercial	15	2.00	34	2.00	80%
Old Town Business District - 1	0	0.00	34	2.00	7%
Old Town Business District - 2	0	0.00	34	2.00	0%
Old Town Business District - 3	0	0.00	34	2.00	0%
General Commercial	0	2.00	34	2.00	100%
Highway Commercial	15	2.00	34	2.00	25%
Business Park	0	0.00	0	0.00	100%
Commercial Corridor District	15	2.00	34	2.00	7%
Medical Services	0	0.00	0	0.00	0%

Housing Development Since 2010 (HUD)

- Housing development in Arlington has changed significantly since 2010.

- Before 2017, most of the housing built in the City was single family housing.

- After 2017, most of the housing has been multifamily.

Legend: Units in Single-Family Structures; Units in 2-unit Multi-Family Structures; Units in 3- and 4-unit Multi-Family Structures; Units in 5+ Unit Multi-Family Structures
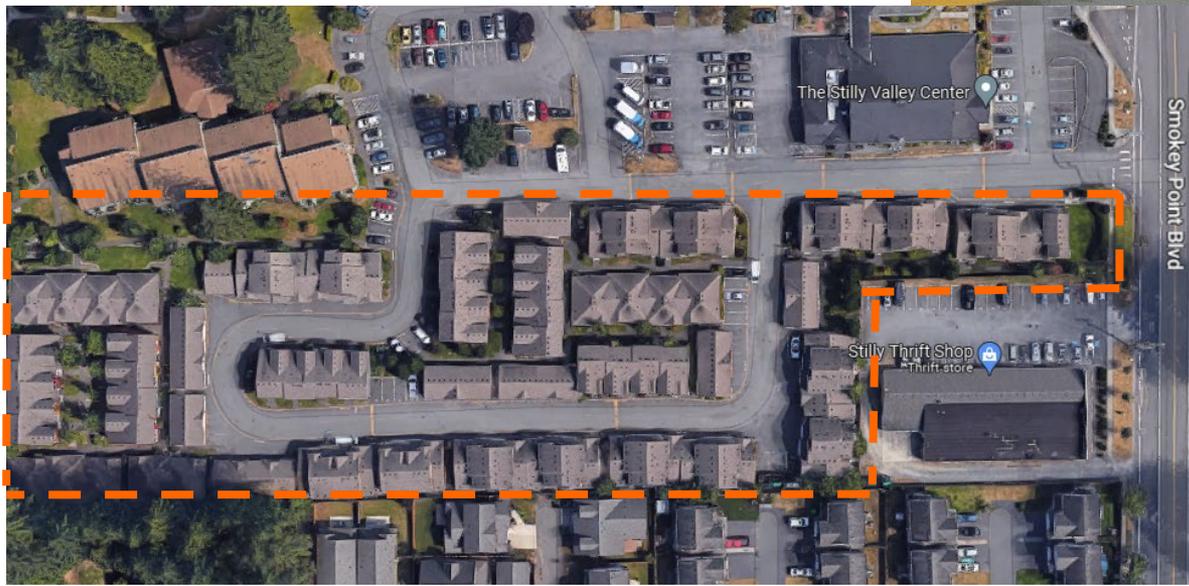
Dwelling Units per Acre

All Multfamily projects built in City of Arlington, 2012 to present

Source: CoStar.

Chelsea Village, 19 units/acre

18222 Smokey Point Boulevard
69 units; Built 2009
3.64 acres

Centennial Park, 23 units/acre

17327 67th Avenue NE
202 units; Built 2021
5,022 SF retail/office
8.81 acres

Building 1 & 4
Retail Suites

Stillaguamish Gardens, 38 units/acre

18318 Smokey Point Boulevard, Arlington
30 units; Built 2014
0.8 acres

6605 Apartments: 50 units/acre

6605 204th Street NE, Arlington
29 units; Built 2023
2,755 SF retail/office
0.58 acres

Cedar Pointe: 63 units/acre

17309 40th Avenue NE, Arlington
256 units; Built 2020
4.05 acres