



ANNUAL DEVELOPMENT PROFILE

Update 2021



EXECUTIVE SUMMARY

BACKGROUND

The Annual Development Profile has been produced since 2003 and is meant to provide a summary of development changes within Arlington over the previous year. It is organized into sections defining five development measures: Housing, Construction, Zoning, Platting, and Land Use. Graphics and maps are included in each of these sections so as to provide detailed locational information regarding development trends throughout the City. A sub-areas map has been included (right) for reference throughout the report.

HOUSING

Changes and trends in the City's housing unit totals are detailed in this section. Historic tallies are provided to facilitate understanding of the City's housing trends within today's development context. Current housing estimates, analysis of growth trends, and sub-area densities are also detailed.

CONSTRUCTION

This section provides descriptions of new residential and non-residential construction trends for the City as a whole as well as sub-areas. Maps and graphics detail the location of new construction activity.

ZONING

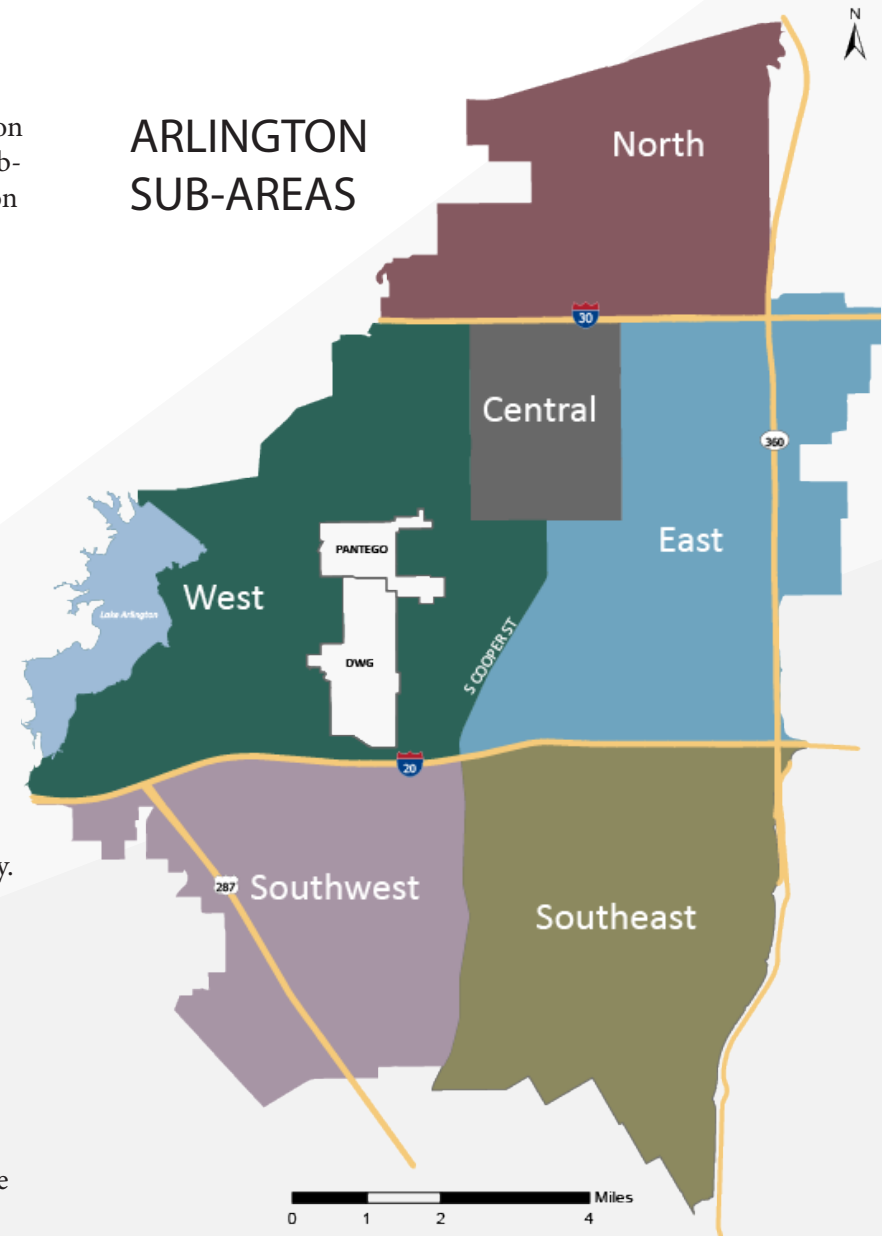
Current zoning conditions as well as a vacant-developable land by zoning are included. Additionally, maps illustrating existing zoning and zoning activity are provided.

PLATTING

As platting activity is a gauge of future development activity, this section records the number and location of new lots through use of final, combination, and minor plats over a five year timeframe. Replatting is also included in the analysis to accurately define redevelopment activity. Plats processed in 2021 are indicated in section graphics.

LAND USE

Arlington's parcel land use is presented in this section to visualize the diverse utilization and where particular types of land use are most common throughout the City.



HOUSING

The Housing section utilizes finalized residential permit data to determine the total number of housing units within the City and details how and where these changes have occurred over the years. These numbers do not include residential units currently under development; those will be considered in the Construction section. Overall, Arlington experienced an increase of 1,287 housing units between 2020 and 2021. The total number of housing units for each year is calculated using the following formula:

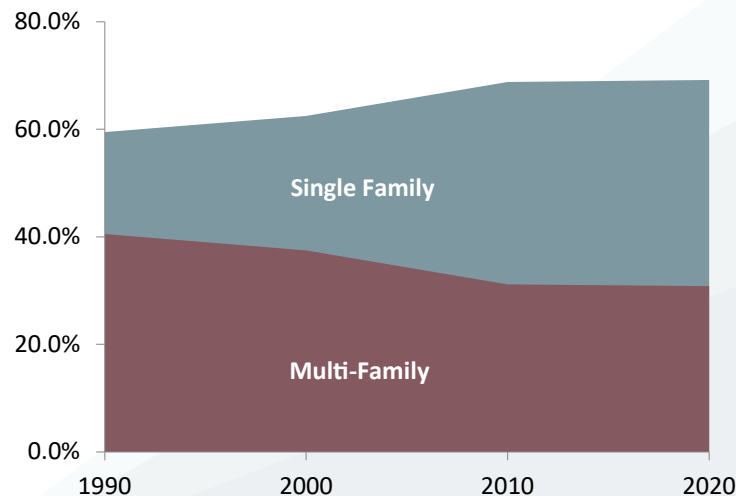
$$\begin{array}{|c|} \hline \text{Previous year's} \\ \text{total housing} \\ \text{units} \\ \hline \end{array} + \begin{array}{|c|} \hline \text{Finaled} \\ \text{residential units} \\ \text{for that year} \\ \hline \end{array} - \begin{array}{|c|} \hline \text{Finaled} \\ \text{residential} \\ \text{demolitions for} \\ \text{that year} \\ \hline \end{array} = \begin{array}{|c|} \hline \text{Total number} \\ \text{of housing} \\ \text{units} \\ \hline \end{array}$$

HOUSING UNITS BY TYPE AND SUB-AREA, 1990-2020

	Central		East		North		Southeast		Southwest		West		Citywide		Citywide Totals	Share	
	SF	MF	SF	MF	SF	MF	SF	MF	SF	MF	SF	MF	SF	MF		SF	MF
1990	4,094	5,765	16,345	14,514	5,567	15,573	8,852	1,091	10,653	2,092	22,075	7,012	67,586	46,050	113,636	59.5%	40.5%
2000	4,022	6,241	16,902	15,568	6,635	16,511	16,751	1,269	14,346	2,320	23,966	7,672	82,622	49,581	132,203	62.5%	37.5%
2010	4,846	5,023	18,895	14,005	7,406	15,367	24,991	2,023	17,195	2,021	26,285	6,655	99,618	45,094	144,712	68.8%	31.1%
2020	4,809	5,974	19,041	14,268	9,585	15,248	26,056	2,277	18,344	2,209	26,537	6,555	104,372	46,531	150,903	69.2%	30.8%

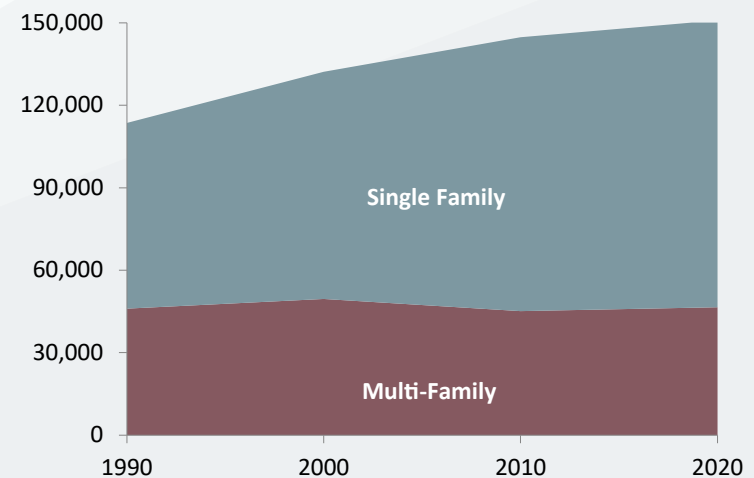
Source: U.S. Census Bureau (2020 data source: City of Arlington, Office of Strategic Initiatives)

HOUSING UNIT MIX, 1990-2020



Source: U.S. Census Bureau (2020 data source: City of Arlington, Office of Strategic Initiatives)

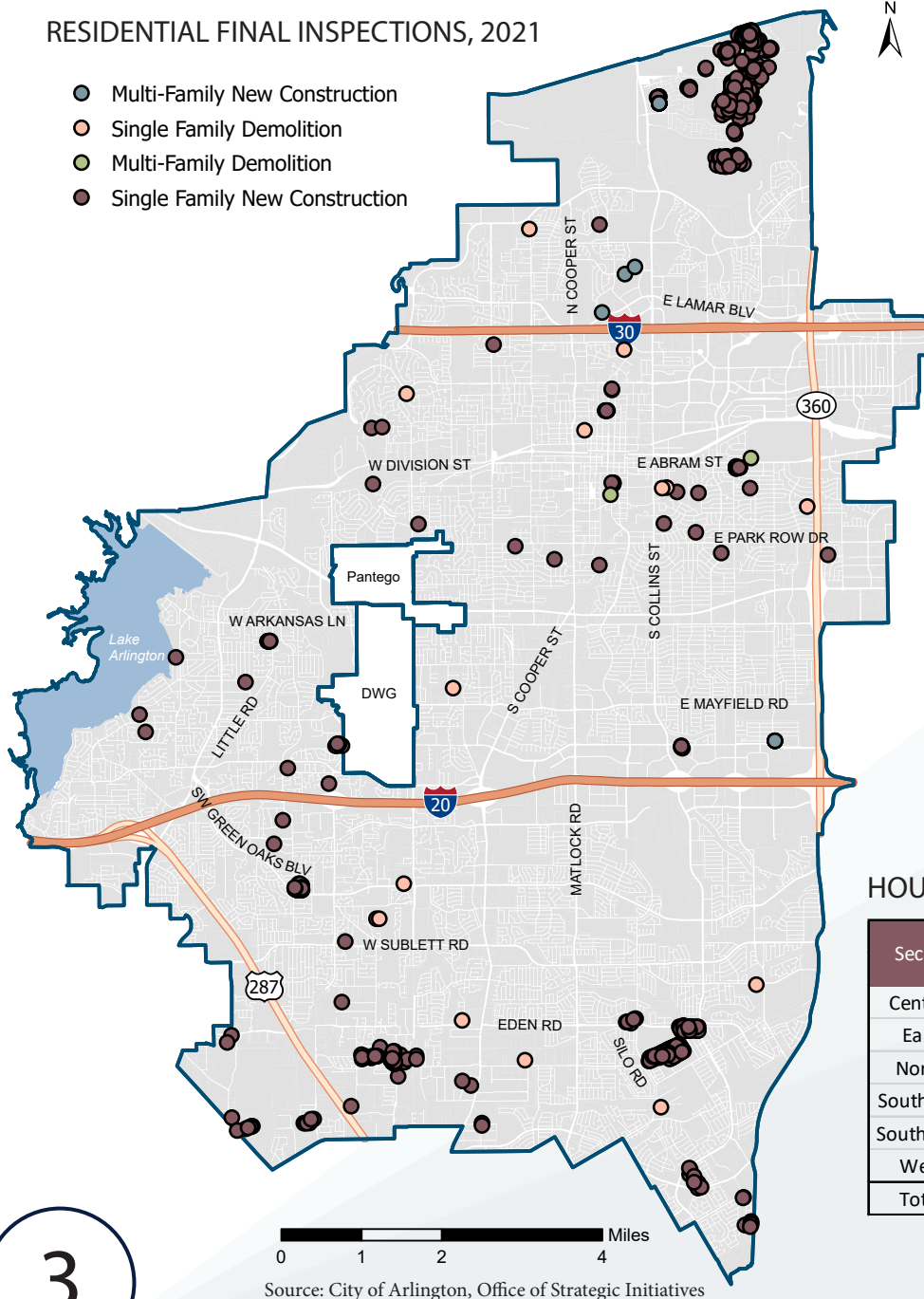
TOTAL HOUSING UNITS, 1990-2020



Source: U.S. Census Bureau (2020 data source: City of Arlington, Office of Strategic Initiatives)

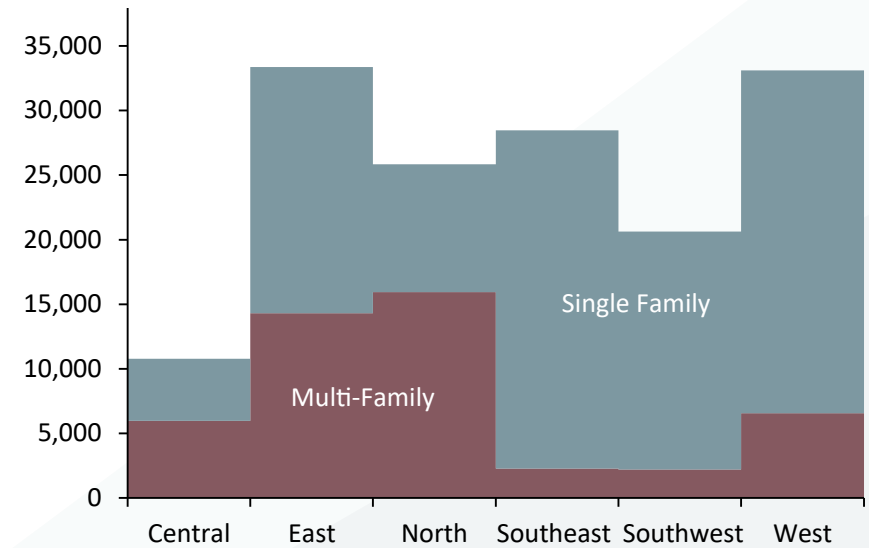
RESIDENTIAL FINAL INSPECTIONS, 2021

- Multi-Family New Construction
- Single Family Demolition
- Multi-Family Demolition
- Single Family New Construction



Source: City of Arlington, Office of Strategic Initiatives

HOUSING UNITS BY SUB-AREA, 2021



Source: City of Arlington, Office of Strategic Initiatives

HOUSING UNIT CHANGE BY SUB-AREA, 2021

Sector	Total 2020 Unit Count			2021 Unit Change			Total 2021 Unit Count		
	SF	MF	Other	SF	MF	Other	SF	MF	Other
Central	4,809	5,974	0	15	-8	0	4,824	5,966	0
East	19,041	14,268	0	22	30	0	19,063	14,298	0
North	9,585	15,248	26	310	703	0	9,895	15,951	26
Southeast	26,056	2,277	0	124	0	0	26,180	2,277	0
Southwest	18,344	2,209	0	68	0	0	18,412	2,209	0
West	26,537	6,555	67	23	0	0	26,560	6,555	67
Total	104,372	46,531	93	562	725	0	104,934	47,256	93

Source: City of Arlington, Office of Strategic Initiatives

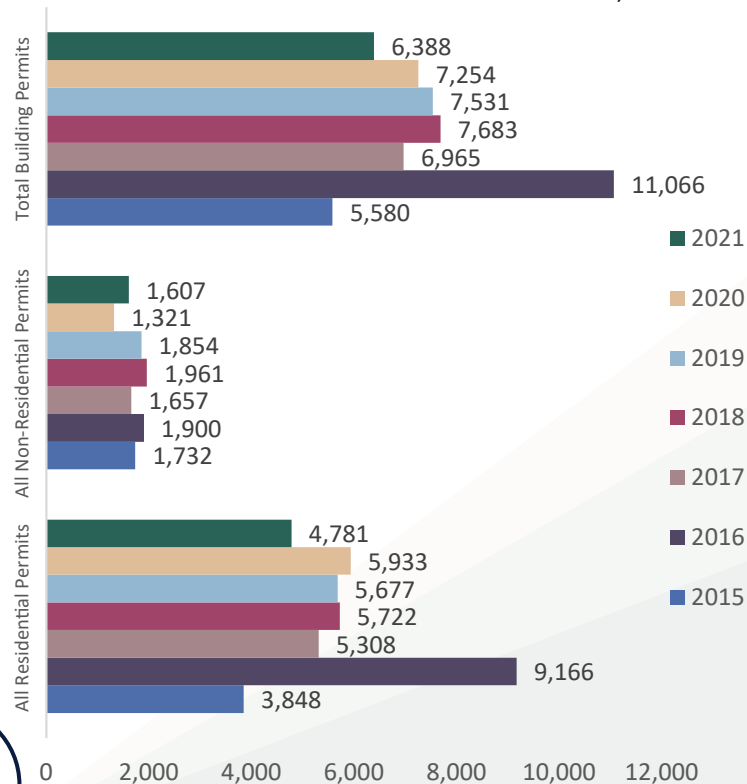
CONSTRUCTION

The construction section of the report highlights data related to issued permits, rather than finaled permits, as described in the previous (housing) section. The number of issued permits shows if, where, and what kind of development within the city is occurring.

Both residential and commercial permits can include new construction permits or permits such as additions, window/door replacement, signs, and more. Page four considers all issued permits, while pages five and six highlight just permits for new construction, indicating where development is taking place.

Total building permits decreased by 866 (11.9%) from 2020 to 2021.

TOTAL NUMBER OF ISSUED PERMITS BY CATEGORY, 2021



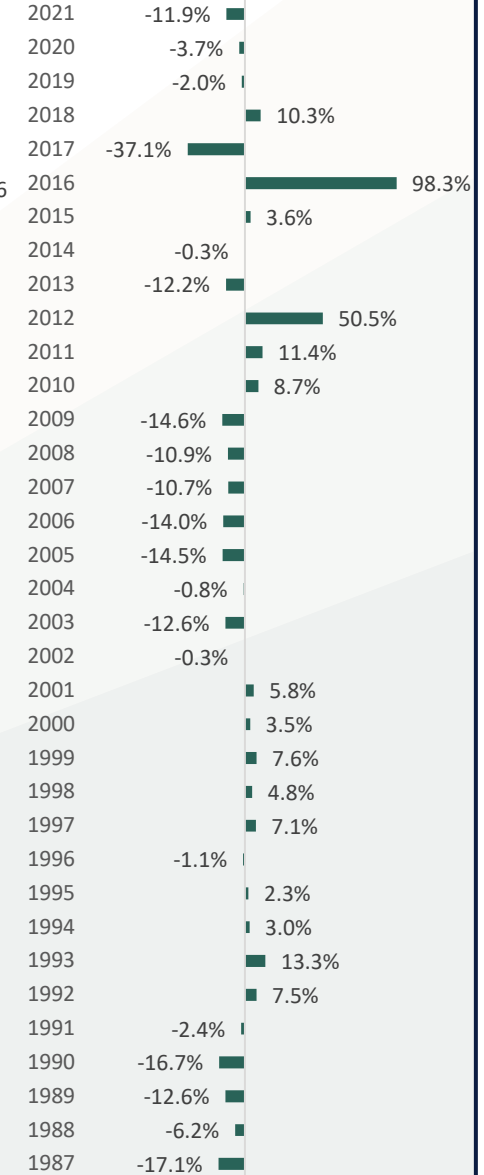
Source: City of Arlington, Office of Strategic Initiatives

TOTAL NUMBER OF ISSUED PERMITS BY YEAR, 1987 - 2021

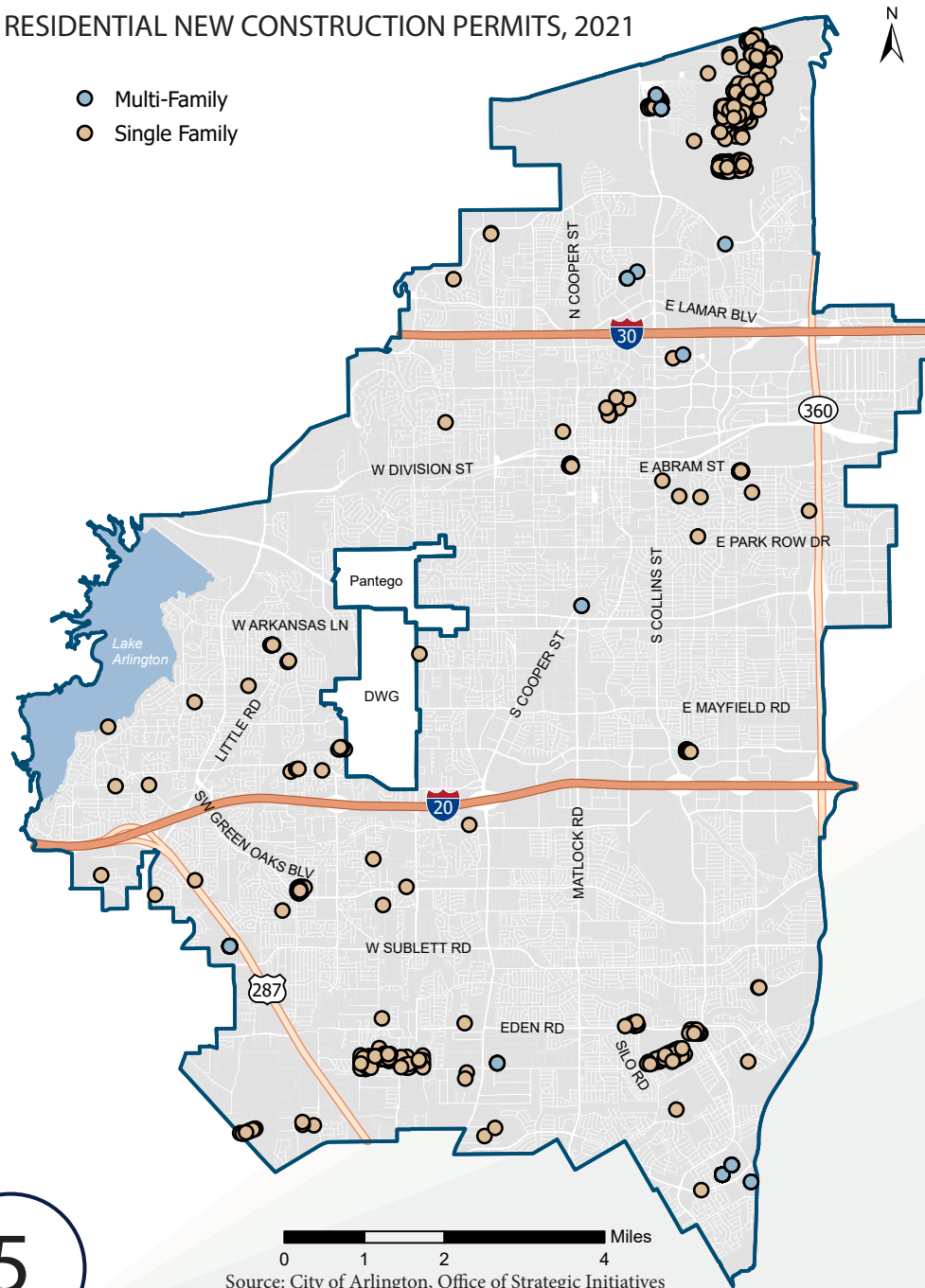


Source: City of Arlington, Office of Strategic Initiatives

ANNUAL RATE OF CHANGE FOR TOTAL PERMITS ISSUED, 1987 - 2021



RESIDENTIAL NEW CONSTRUCTION PERMITS, 2021

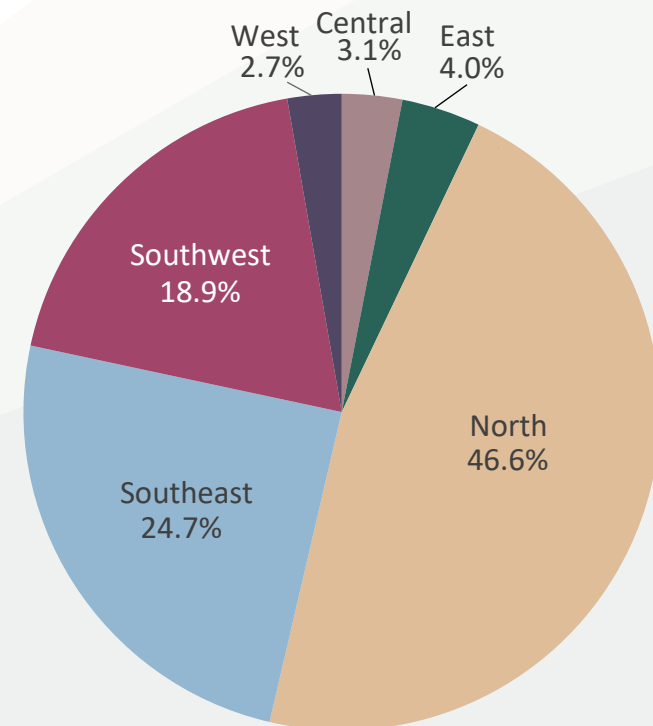


RESIDENTIAL NEW CONSTRUCTION PERMITS

New single family and multi-family permits show the housing market's growth over the year 2021. Many of the new permits are concentrated to large single family developments, with the majority in North Arlington's Viridian development. The two southern sub-areas, Southeast and Southwest, contain the second and third most new residential permits. While the North, Southeast, and Southwest sub-areas show predominantly clusters of new residential permits, the West, Central, and East sub-areas show more distributed development patterns.

Arlington experienced a 20.2% increase (159 permits) in residential new construction permits between 2020 and 2021.

RESIDENTIAL NEW CONSTRUCTION PERMITS BY SUB-AREA, 2021



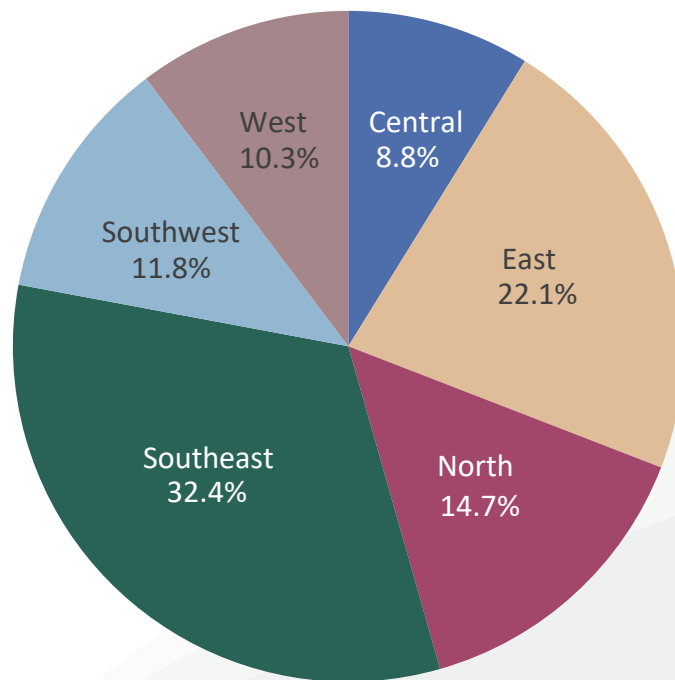
Source: City of Arlington, Office of Strategic Initiatives

NON-RESIDENTIAL NEW CONSTRUCTION PERMITS

The non-residential new construction permits show where commercial, warehousing, institutional, and other new constructions are being built in the City. The development of new construction is relatively evenly distributed throughout the City. The largest sub-areas, the Southeast, East, and North, contain the majority of new development. The exception is in the West, Southwest, and Central sub-areas that have a proportionally low share of new non-residential construction, which is likely due to the prevalence of residential zoning for the sub-areas.

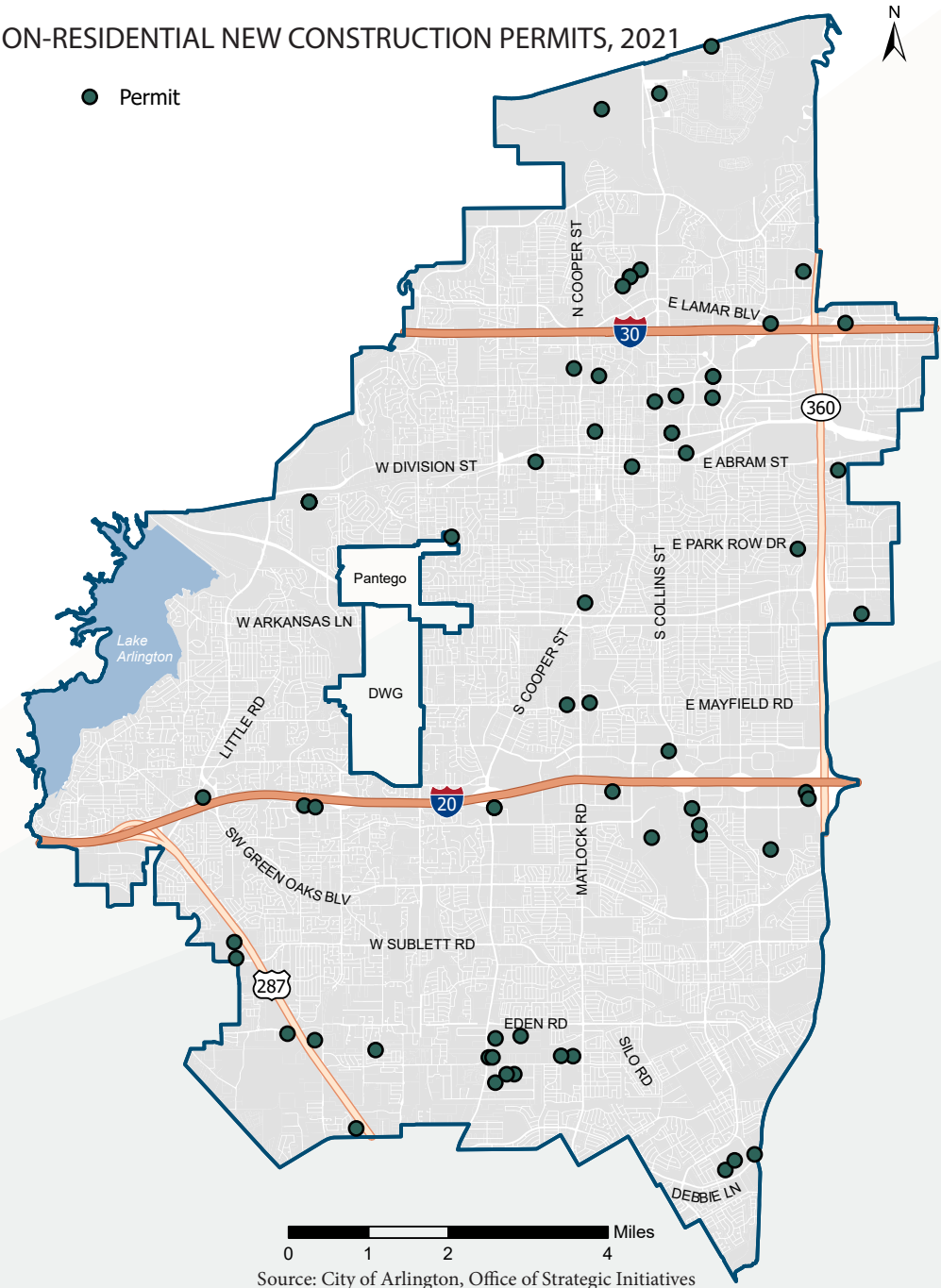
Arlington experienced a 13.9% decrease (11 permits) in non-residential new construction permits between 2020 and 2021.

NON-RESIDENTIAL NEW CONSTRUCTION PERMITS BY SUB-AREA, 2021



Source: City of Arlington, Office of Strategic Initiatives

NON-RESIDENTIAL NEW CONSTRUCTION PERMITS, 2021

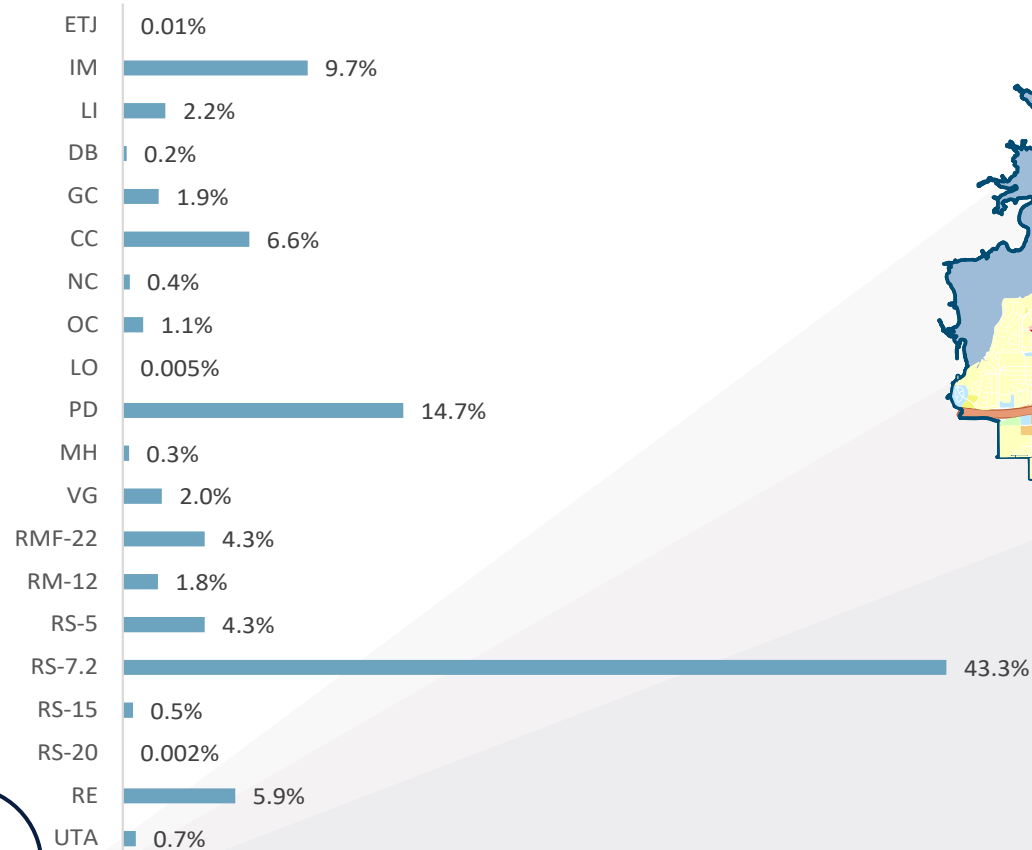


ZONING

Zoning regulations refer to restrictions on how property can or cannot be used within a city, whereas parcel land use refers to a description of how that land is primarily being used. Zoning ordinances regulate how current and future land can be used, as described in the City's [Unified Development Code](#).

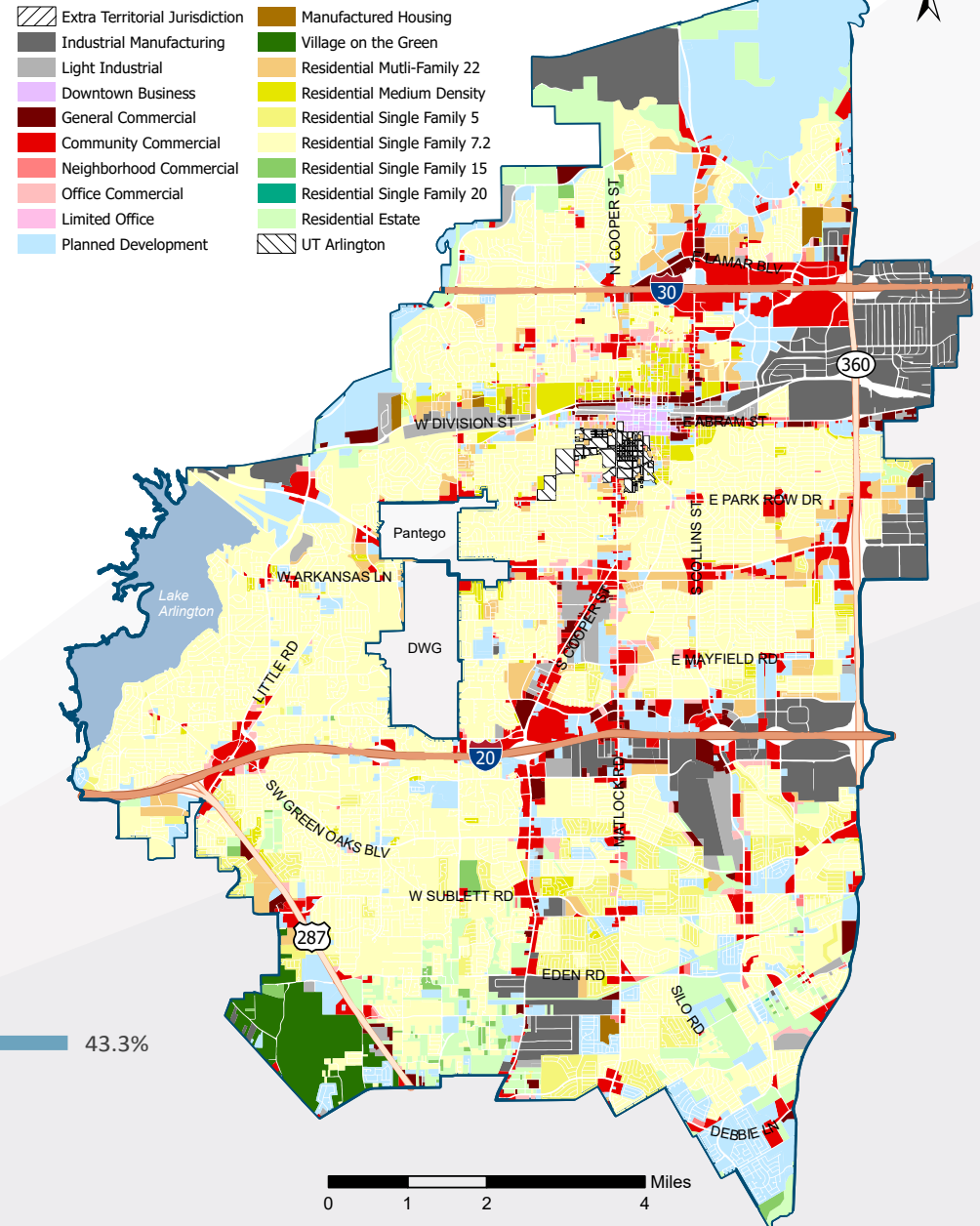
The first nine zoning districts listed to the right are non-residential, and Planned Development may be either residential or non-residential.

SHARE OF LAND BY ZONING CATEGORY, 2021



Source: City of Arlington, Office of Strategic Initiatives

ZONING DISTRICTS, 2021



Source: City of Arlington, Office of Strategic Initiatives

HOW ZONING DISTRICTS CHANGE

Zoning cases show where zoning has changed in the past year, whether a permanent zoning change (zoning case) or a zoning exception for a specific use (SUP).

The zoning on a specific piece of property can change only through a public hearing process. This process allows public participation from the applicant, interested citizens, and decision makers. The process requires public notification, public hearings, and final approval by the City Council.

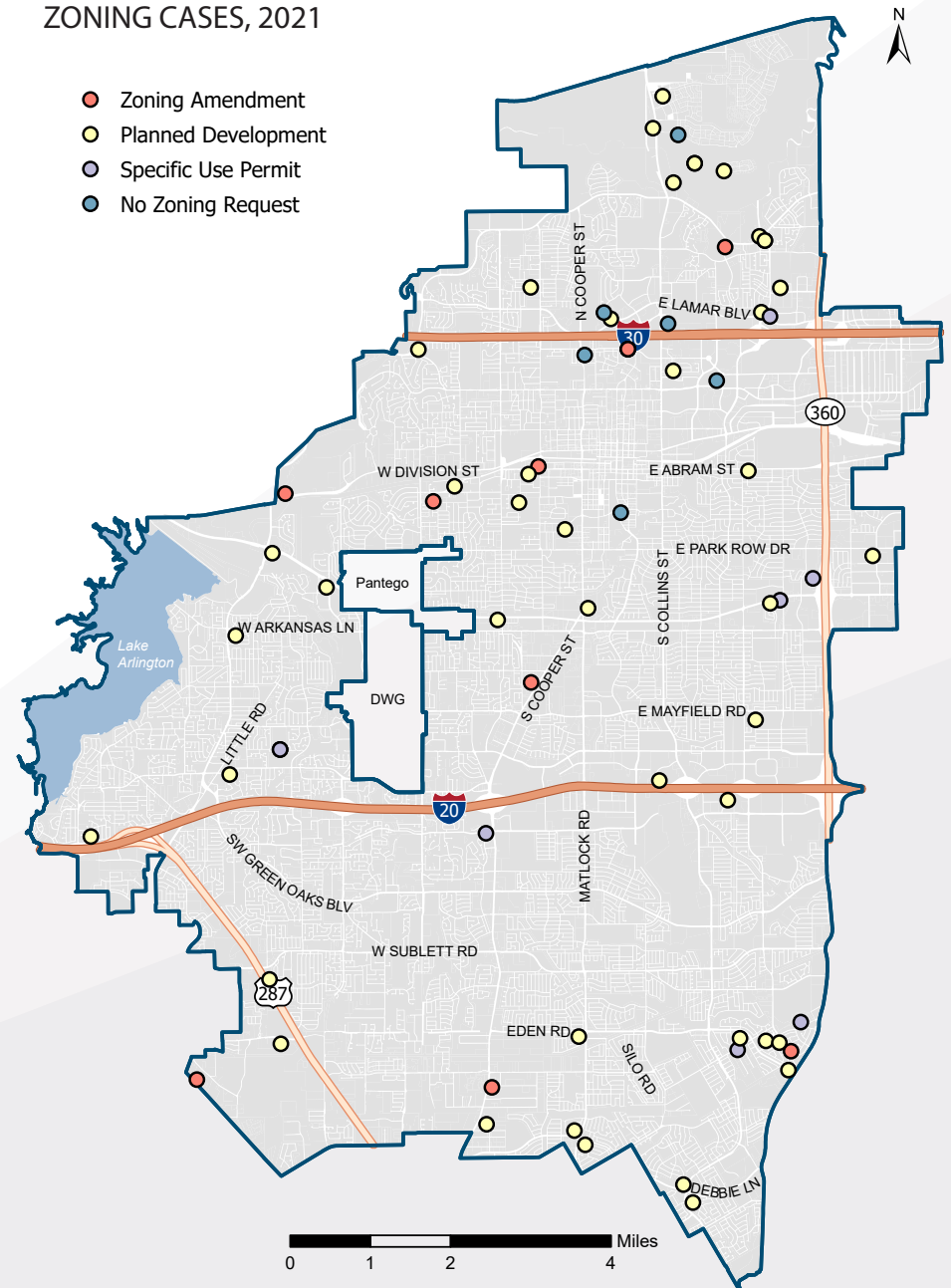
An applicant may seek a change to establish a use not permitted in the current zoning district. The applicant may use the zoning process to request rezoning to a district that will permit the use outright, with conditions, or by a Specific Use Permit.

Conditional use means the land use is permitted if certain conditions are met. Conditions typically involve screening, buffering, and/or size requirements.

The specific use permit (SUP) provides a means to develop certain uses in a manner that is compatible with adjacent property and consistent with the character of the neighborhood. The City Council may grant, repeal, and amend Specific Use Permits (SUP's) for certain uses, but only where specified in the [Unified Development Code](#). SUP approval occurs by ordinance, and is a type of zoning amendment.

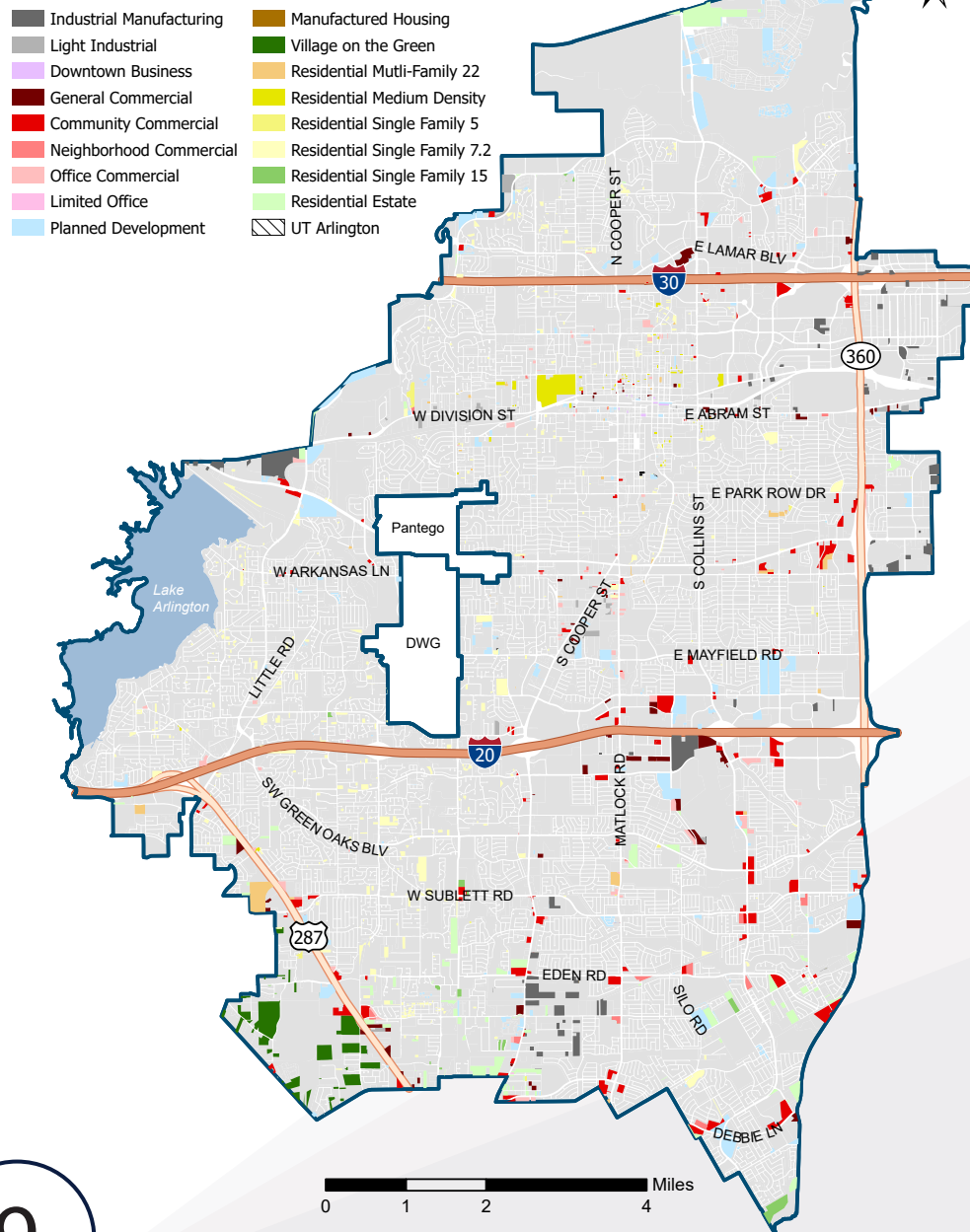
Of the 69 zoning cases in 2021, 38 have been approved, 11 were denied, 2 were withdrawn, and 18 are pending, continued, under review, or awaiting City Council.

ZONING CASES, 2021



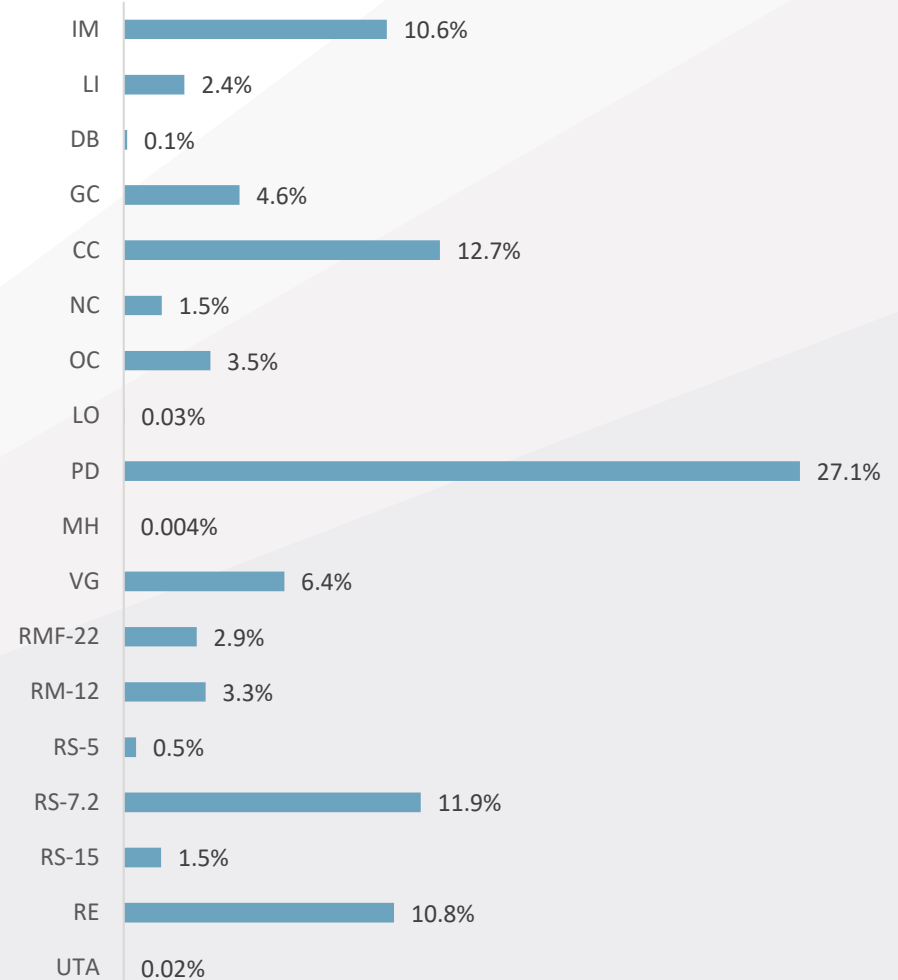
Source: City of Arlington, Office of Strategic Initiatives

VACANT-DEVELOPABLE PARCELS BY ZONING DISTRICT, 2021



The “vacant-developable” land use category highlights areas for future development within the city. Vacant-developable land is empty land that could support development. Mapping vacant-developable parcels by their zoning district gives an indication of what kind of development may take place on these parcels in the future.

SHARE OF VACANT-DEVELOPABLE LAND BY ZONING DISTRICT, 2021



Source: City of Arlington, Office of Strategic Initiatives

PLATTING

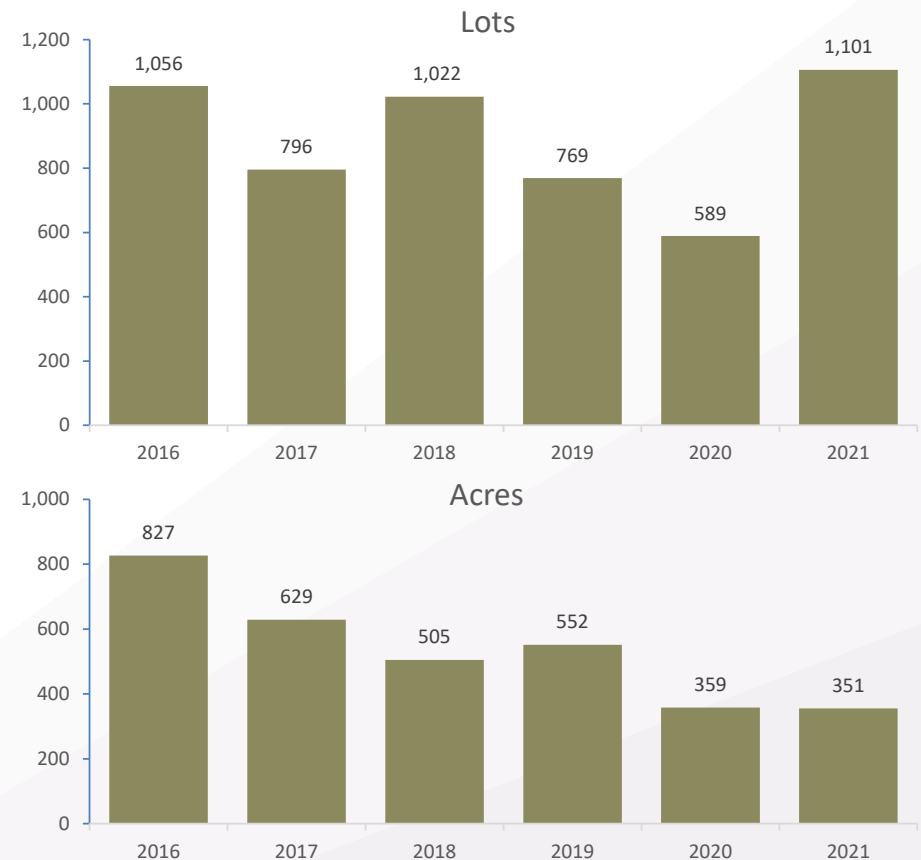
Plats are defined by the City's [Unified Development Code](#) as "the plan or map for the development to be filed for record in the Plat Records or Deed Records of Tarrant County, Texas." Plats show how a piece of land will be divided into lots.

Plats are subdivided or combined to accommodate new growth and a changing economic landscape. The incorporation of final, minor, and combination plats create new lots within the City. Areas of new plats represent the possibility of upcoming changes in land uses or number of permits. New plats are the drivers for the numerical changes represented in the other sections of this report.

Post-recession Arlington is demonstrating a steady development trend, averaging just under fifty cases per year since 2016. Given the unique challenges of 2020, the total number of plats filed decreased from previous years; however, this number returned to match previous totals in 2021. Continuing a six-year trend, replats comprised the most common type of platting case (tied with final plats) filed with the City in 2021; however, such activity remains indicative of a stable community nearing build-out.

Arlington saw a 86.9% increase in platted lots and a 2.2% decrease in platted acreage between 2020 and 2021.

PLATTING ACTIVITY, 2021



Source: City of Arlington, Office of Strategic Initiatives

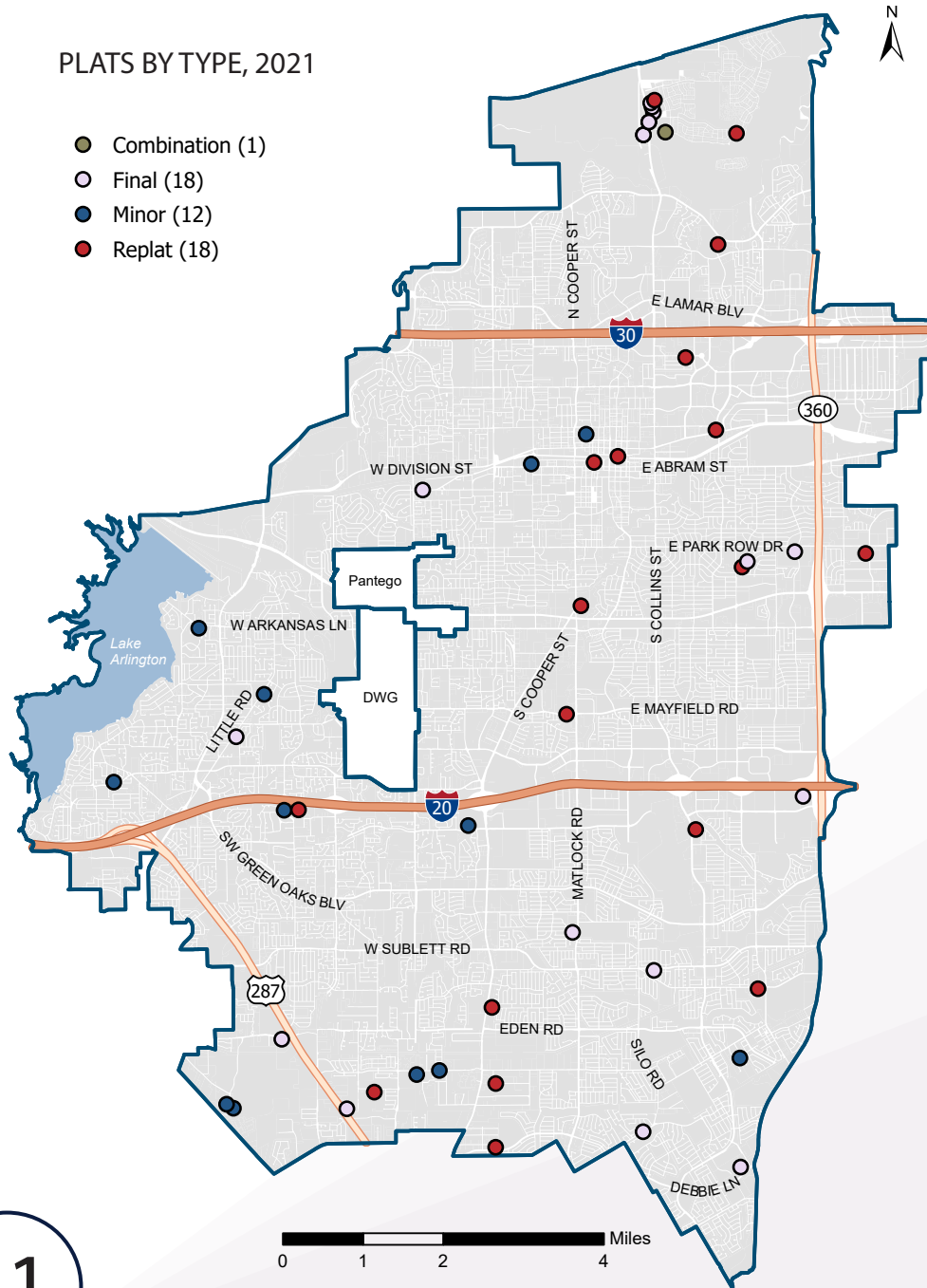
PLATTING BY TYPE, 2017-2021

Plat Type	2017			2018			2019			2020			2021		
	Cases	Lots	Acres	Cases	Lots	Acres	Cases	Lots	Acres	Cases	Lots	Acres	Cases	Lots	Acres
Final	12	733	209	12	872	217	10	667	164	10	462	223	18	1,026	253
Minor	10	13	218	7	9	11	12	16	17	6	6	29	12	17	18
Combination	5	7	28	8	11	31	3	4	67	1	1	1	1	1	1
Replat	21	43	181	39	130	246	23	82	303	16	120	104	18	57	79
Total	48	796	629	66	1,022	505	48	769	552	33	589	359	49	1,101	351

Source: City of Arlington, Office of Strategic Initiatives

PLATS BY TYPE, 2021

- Combination (1)
- Final (18)
- Minor (12)
- Replat (18)



Source: City of Arlington, Office of Strategic Initiatives

Plats filed in 2021 are symbolized by their type on the map to the left. These types are described below, as defined by the City's [Unified Development Code](#).

Combination Plat:

A plat for 30 or fewer lots that combines both a preliminary plat and a final plat.

Final Plat:

The instrument that becomes the official, accurate permanent record of the division of land.

Minor Plat:

A subdivision resulting in four or fewer lots and that does not require the creation of any new public street or the extension of municipal facilities.

Replat:

A revision of existing platted lots, or existing platted lots in combination with existing tracts, for the purpose of creating a new lot configuration.

FILED PLATS BY SUB-AREA, 2021

Sub-Area	Plats	Acres	Lots
Central	4	3	6
East	8	41	25
West	5	13	46
Southwest	10	41	113
Southeast	11	97	165
North	11	155	746
Total	49	351	1,101

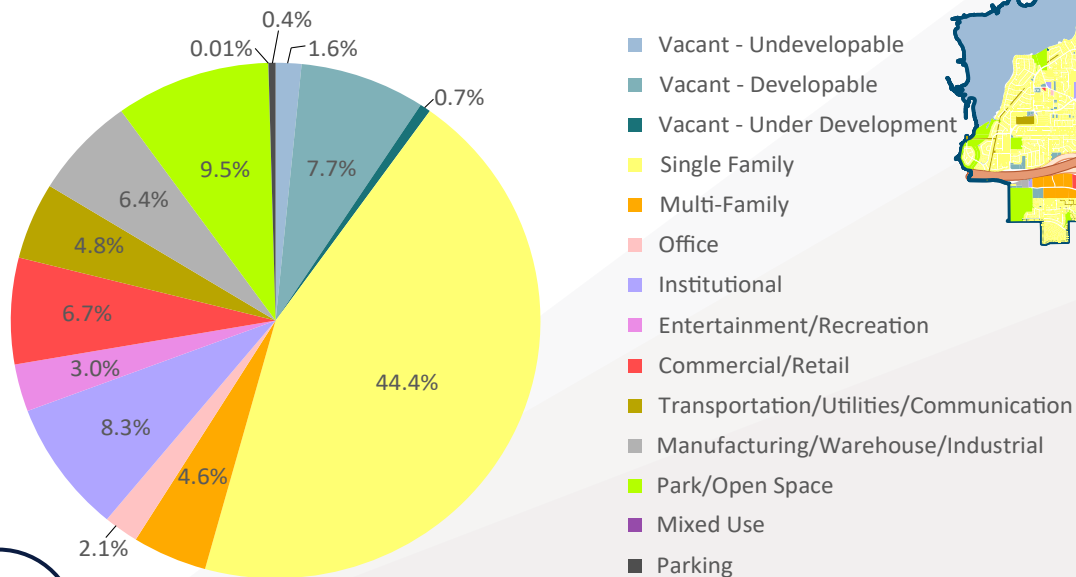
Source: City of Arlington, Office of Strategic Initiatives

LAND USE

The City of Arlington uses a categorization of land uses to represent how a parcel of land is being used. This is separate from Zoning, which classifies all possible land uses for a parcel; the Land Use represents the current primary land use on that parcel. These land uses are generally determined based on the permits or demolitions that occur for a parcel's address.

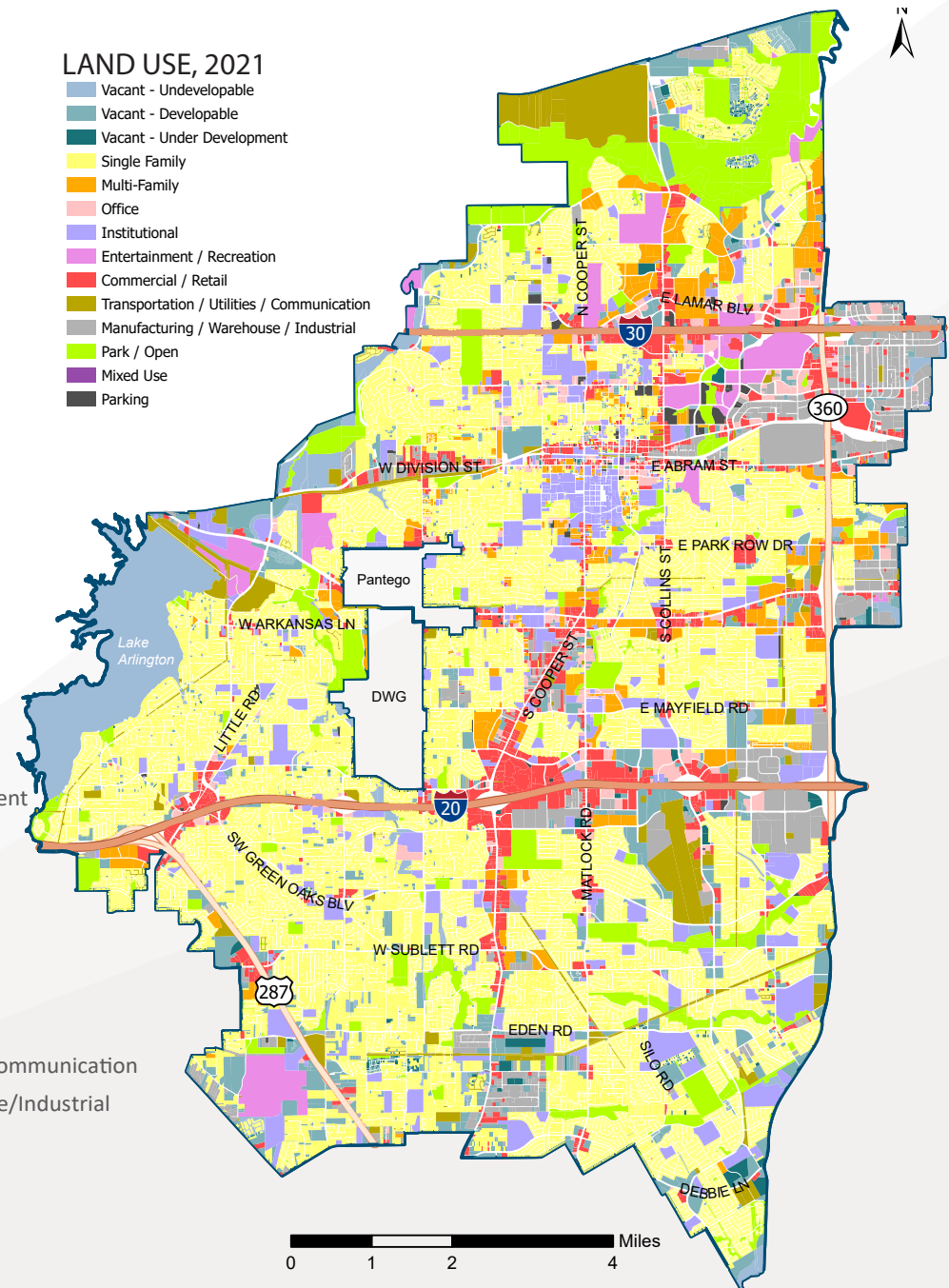
Comparing the shares of land uses, it is important to keep in mind the actual use and how it contributes and operates within the City as a whole. For instance, single family land acreage exceeds multi-family acreage by 39.8%, but housing units on those parcels were a mix of 68.9% single family and 31.1% multi-family for the year 2021 (see Housing).

LAND USE SHARE, 2021



Source: City of Arlington, Office of Strategic Initiatives

LAND USE, 2021



Source: City of Arlington, Office of Strategic Initiatives

LAND USE OVERVIEW

The largest portion of Arlington's land area was devoted to single family land use in 2021 with 44.4% percent of the total land area. This is the same as in 2020 and slightly higher than previous years (2019: 44.0%, 2018: 43.8%). Single family land is more prevalent in West and South Arlington, though single family land in North Arlington is increasing due to the construction of Viridian.

Land devoted to multi-family uses was concentrated primarily in the North and East and represents 4.6% of the total share of land acreage in the City. The East also contained the largest share of the City's manufacturing/warehouse/industrial and commercial/retail uses representing the most diverse area of land use throughout the City.

Other significant land use concentrations, specifically parks/open space, occurred in the north, reflecting the location of River Legacy Park, though parkland is also spread throughout the City through the linear park system. Commercial land uses are also concentrated around major transportation corridors such as I-30, Division St, S Cooper St and I-20.

LAND USE RECATEGORIZATION

The "Parking" category was a new land use category developed in 2020 to better distinguish land that is primarily used for parking from land that is primarily empty and considered vacant-developable.

An additional category of "Vacant - Under Development" was developed in 2021 to distinguish parcels that are undergoing development from parcels that are entirely vacant. "Vacant - Under Development" parcels differ from "Vacant - Developable" parcels because they have been issued a permit for new construction to occur. These parcels remain "Vacant - Under Development" until the permit is finalized and they are changed to their appropriate final land use category.

As a result, the total acreage and share of vacant-developable land for 2021 may have more variance from 2020 than previous years.

LAND USE CHARACTERISTICS, 2021

Land Use Categories	Area (acres)	Share (%)
Vacant - Undevelopable	793.7	1.6%
Vacant - Developable	3,838.7	7.6%
Vacant - Under Development	336.0	0.7%
Single Family	22,454.0	44.4%
Multi-Family	2,305.5	4.6%
Office	1,080.8	2.1%
Institutional	4,201.5	8.3%
Entertainment/Recreation	1,502.6	3.0%
Commercial/Retail	3,369.8	6.7%
Transportation/Utilities/Communication	2,430.9	4.8%
Manufacturing/Warehouse/Industrial	3,216.4	6.3%
Park/Open Space	4,784.3	9.5%
Mixed Use	3.4	0.01%
Parking	219.2	0.4%
Total	50,536.8	100.0%
City Land Total	63,604.1	
Arlington Lake Area	1,957.2	
Roadway	11,110.1	

The Annual Development Profile
is produced each year by the
City of Arlington's Office of
Strategic Initiatives.

Data Sources:
City of Arlington, Office of Strategic Initiatives
U.S. Census Bureau