ARLINGTON QUARTERLY INDICATORS

ARLINGTON
VIRGINIA

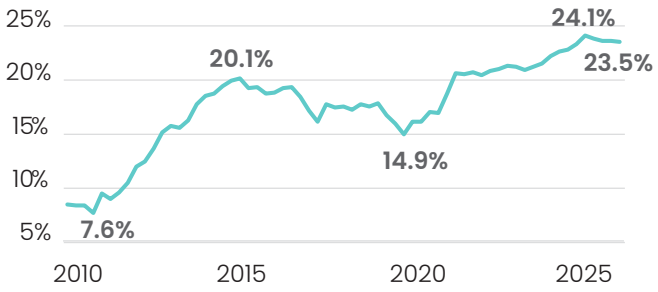
Q1 2026

Market Snapshot

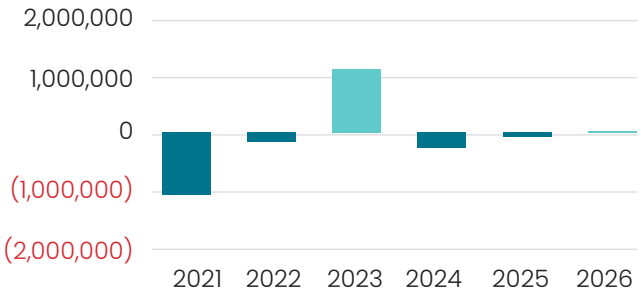
Office Q1 2026

Rentable Building Area (RBA) 44,264,048

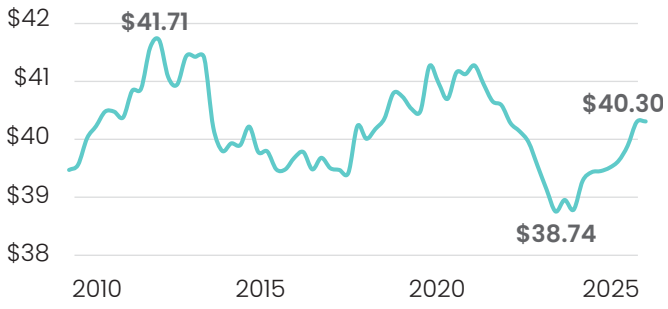
Overall Vacancy Rate (%) 23.5%



Net Absorption (SF) 41,767



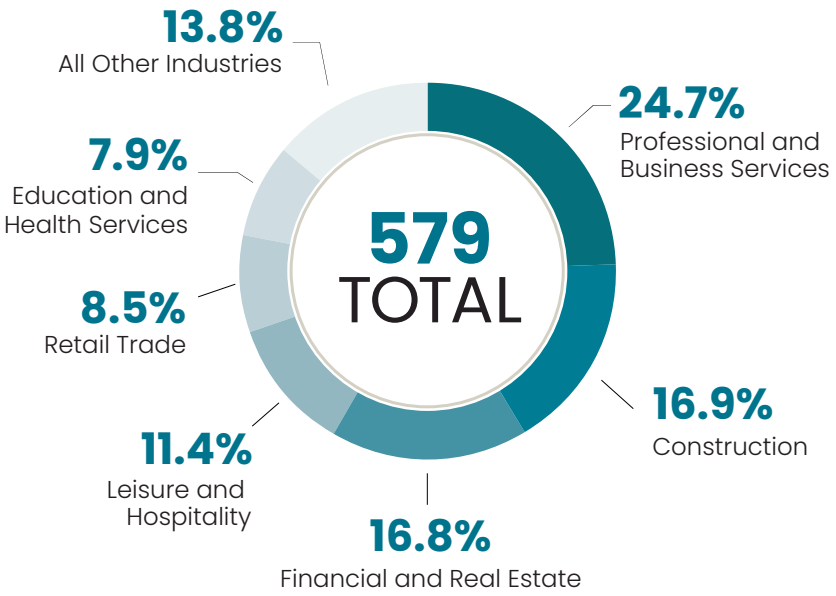
Average Base Rent ($/SF) $40.30



Source: CoStar 04/05/2026

Business Licenses

Commercial Business Licenses Issued Q1 2026



Source: Arlington County Commissioner of Revenue

Certificates of Occupancy

Notable Certificates of Occupancy Issued Q1 2026

Office	SF
HNTB Corporation	25-50K
Scale AI, Inc.	10-25K
Kuwait EMB Cultural Div.	10-25K
Sprezzatura Mgmt. Consult.	10-25K
Koalafi	5-10K
PGIM Real Estate Finance	5-10K
The Mark	5-10K
CORE Architecture & Design	5-10K

Retail/Entertainment	SF
Hilton Arlington Rosslyn	50K+
OneLife Fitness	10-25K
Pentgaon MMA	<5K
Lacoste	<5K

Restaurant/Food	SF
Locket	10-25K
Mezeh	<5K
Tio Pele	<5K
Paisano's	<5K
Flavour United	<5K
Bowl'd Masala	<5K

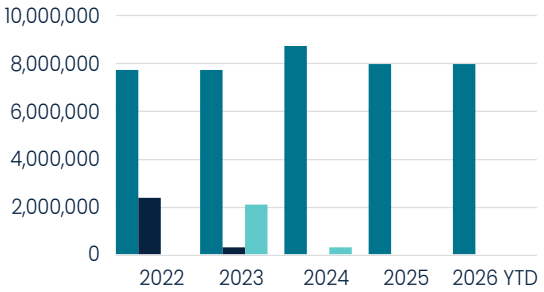
Source: Arlington County Community Planning, Housing and Development

Development Summary

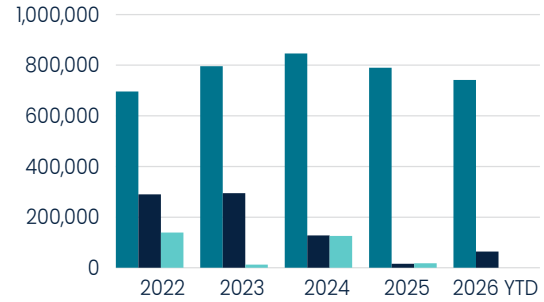
Q1 2026 YTD

	Approved	Under Construction	Completed
Office (SF)	7,976,789	-	-
Retail (SF)	738,472	63,876	-
Residential (Units)	16,270	2,202	-
Hotels (Rooms)	1,083	-	-

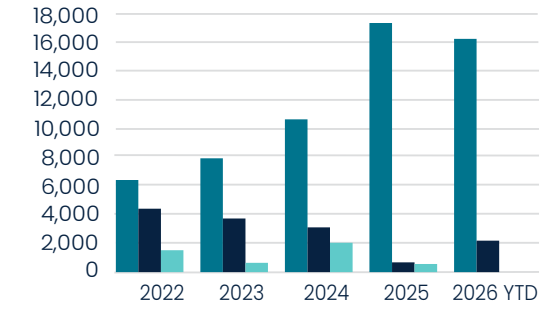
OFFICE SQUARE FEET



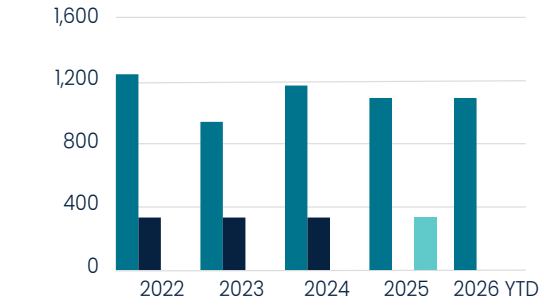
RETAIL SQUARE FEET



RESIDENTIAL UNITS



HOTEL ROOMS



KEY: Approved Under Construction Completed

Source: Arlington County Community Planning, Housing and Development

Economic Indicators

AT-PLACE EMPLOYMENT*

	Reporting Period	Current Quarter	Prior Quarter	Q4 Last Year	Annual Change
Employees	Q4 2025	177,184	180,332	182,464	-2.9%
Establishments	Q4 2025	9,527	9,589	9,629	-1.1%
Gross Wages (weekly)	Q4 2025	$2,519	$2,559	$2,363	6.6%

**Data excludes enlisted military personnel*

Source: Virginia Employment Commission, Quarterly Census of Employment and Wages (QCEW)

CIVILIAN LABOR FORCE*

	Reporting Period	Current Month	Prior Month	Apr. Last Year	Annual Change
Arlington County	Apr-26	151,104	151,253	154,986	-2.5%
Northern Virginia	Apr-26	1,726,187	1,726,795	1,767,477	-2.3%
Unemployment Rate					
Arlington County	Apr-26	2.9%	3.2%	2.6%	0.3 pp
Northern Virginia	Apr-26	3.2%	3.6%	2.7%	0.5 pp

**Readjusted monthly*
pp=percentage points

Source: Virginia Employment Commission, Local Area Unemployment Statistics (LAUS)

HOUSING

	Reporting Period	Current Month	Year to Date	Last Year to Date	Annual Change
New Listings	May-26	255	1,430	1,433	-0.2%
New Pendings	May-26	252	1,083	1,038	4.3%
Closed Sales	May-26	263	941	906	3.9%

Source: Real Estate Business Intelligence

AVERAGE HOUSING PRICES

	Reporting Period	Current Month	Last Period	Last Year	Annual Change
Single Family Detached	May-26	$1,526,051	$1,556,449	$1,482,896	2.9%
Single Family Attached	May-26	$1,009,773	$1,073,455	$945,195	6.8%
Condominium	May-26	$540,373	$528,629	$522,220	3.5%

Source: Real Estate Business Intelligence

(continued)

Economic Indicators (continued)

TOURISM

	Reporting Period	Current Month	Year to Date	Last Year to Date	Annual Change
Hotel Occupancy	Apr-26	83.0%	72.0%	70.7%	1.8%
RevPAR	Apr-26	$199.91	$151.44	$143.40	5.6%
Average Daily Room Rate	Apr-26	$240.80	$205.57	$201.72	1.9%

Source: Amadeus Hospitality

CONSUMER PRICE INDEX (CPI-U)

	Reporting Period	Current Month	Last Period	Last Year	Annual Change
Washington, Arlington and Alexandria (DC, MD, VA and WV)	May-26	334.7	330.3	321.6	4.1%

Source: U.S. Bureau of Labor Statistics

RETAIL SALES (TAXABLE)

	Reporting Period	Current Quarter	Prior Quarter	Q4 Prior Year	Annual Change
Arlington	Q4 2025	$974,297,829	$916,714,260	$893,518,409	9.0%

Source: Virginia Department of Taxation

AIR TRANSPORTATION

Washington National Airport	Reporting Period	Current Month	Year to Date	Last Year to Date	Annual Change
Total Aircraft Operations	Mar-26	25,526	72,029	71,569	0.6%
Total Passengers	Mar-26	2,241,228	5,689,895	5,557,283	2.4%

Source: Metropolitan Washington Airports Authority

Brandon Bedford, Acting Director
Business Investment Group
Arlington Economic Development
703.228.0816
bbedford@arlingtonva.us

ARLINGTON
VIRGINIA