

ARLINGTON QUARTERLY INDICATORS



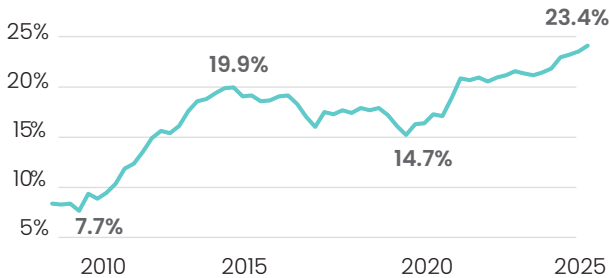
Q2 2025

Market Snapshot

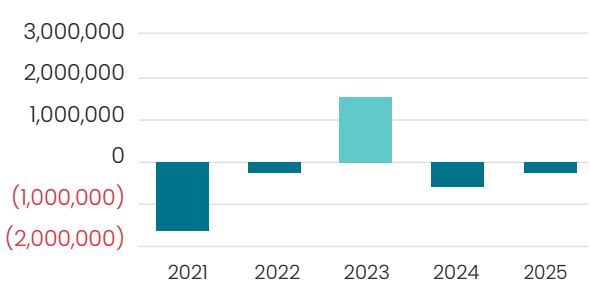
Office Q2 2025

Rentable Building Area (RBA) 44,195,071

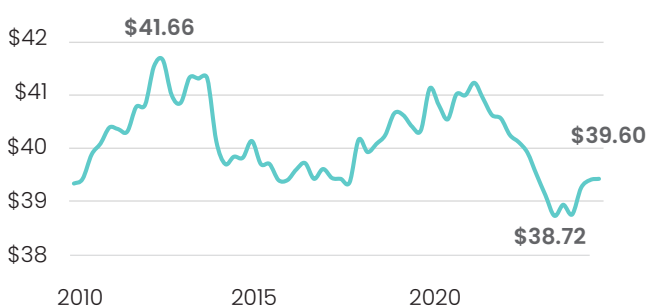
Overall Vacancy Rate (%) 23.4%



Net Absorption (SF) (194,332)



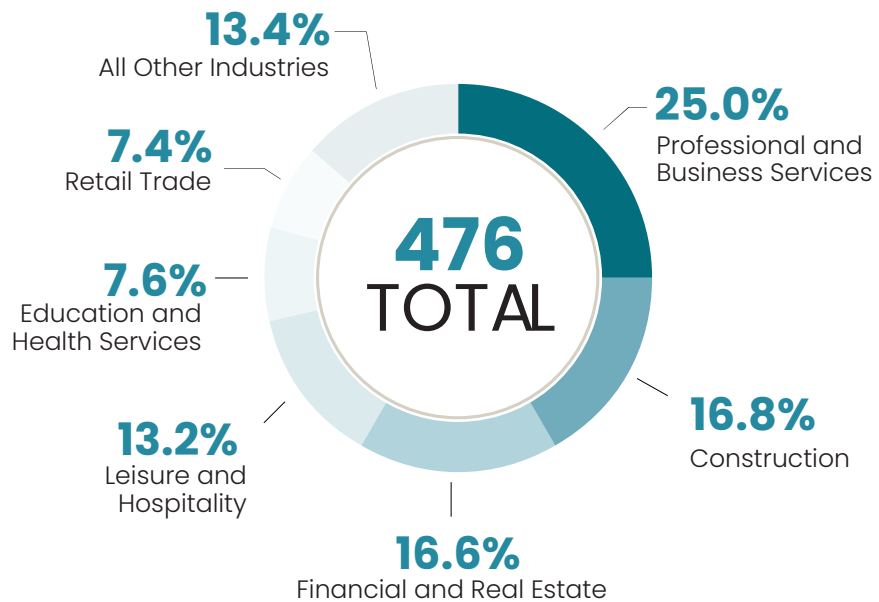
Average Base Rent (\$/SF) \$39.60



Source: CoStar 7/7/2025

Business Licenses

Commercial Business Licenses Issued Q2 2025



Source: Arlington County Commissioner of Revenue

Certificates of Occupancy

Notable Certificates of Occupancy Issued Q2 2025

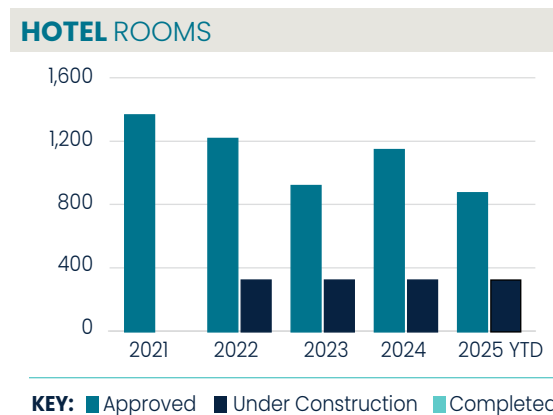
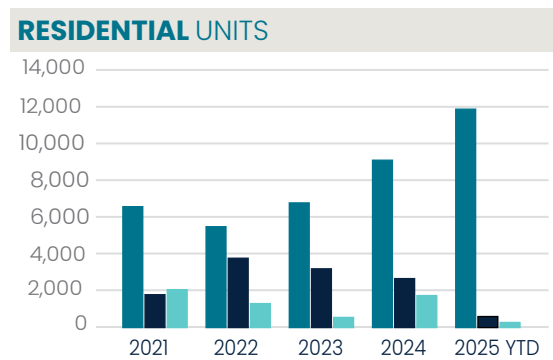
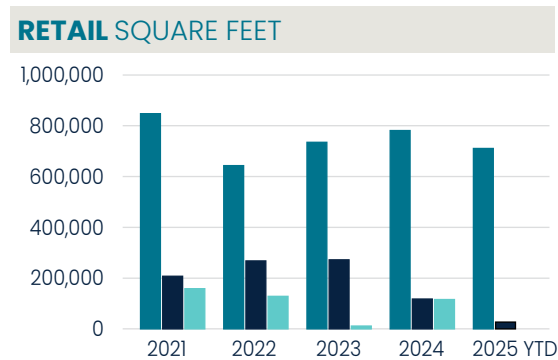
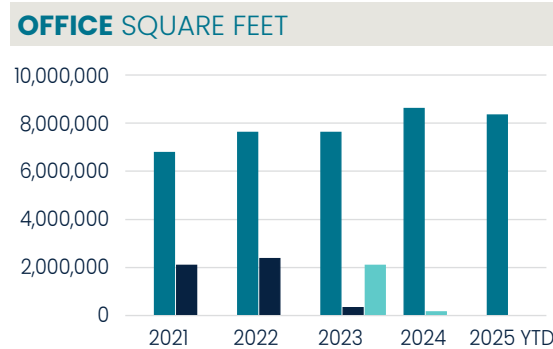
Office	SF	Restaurant/Food	SF
Gartner	25-50K	1983 Chinese Cuisine	5-10K
Govini	25-50K	Westville	<5K
Peraton	10-25K	Bar Chinois	<5K
Allbritton Journalism Institute	10-25K	Astor Mediterranean	<5K
Sytems Planning Analysis	5-10K	Top Halal Market	<5K
John S. and James L. Knight Foundation	<5K	Citi Pizza and Wings	<5K
srcLogic LLC	<5K	The Bamboo Spoon	<5K
Erkiletian Real Estate Svcs.	<5K		
ProMD Health	<5K		
STS International, Inc	<5K		
		Retail/Entertainment	SF
		Club Studio	25-50K
		Fashion Q	10-25K
		Cupid	<5K

Source: Arlington County Community Planning, Housing and Development

Development Summary

Q2 2025 YTD

	Approved	Under Construction	Completed
Office (SF)	8,464,798	-	-
Retail (SF)	766,529	29,300	4,000
Residential (Units)	13,917	710	332
Hotels (Rooms)	887	331	-



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	4Q 2025	182,464	181,774	181,104	0.8%
Establishments	4Q 2025	9,585	9,618	9,577	0.1%
Gross Wages (weekly)	4Q 2025	\$2,471	\$2,246	\$2,377	4.0%

*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	June Last Year	Annual Change
Arlington County	Jun-25	154,744	154,341	156,448	-1.1%
Northern Virginia	Jun-25	1,776,316	1,768,875	1,800,314	-1.3%

Unemployment Rate

Arlington County	Jun-25	3.4%	3.3%	2.3%	1.1 pp
Northern Virginia	Jun-25	3.6%	3.3%	2.7%	0.9 pp

*adjusted 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	Jun-25	255	1,746	1,551	12.6%
New Pendings	Jun-25	244	1,283	1,257	2.1%
Closed Sales	Jun-25	244	1,154	1,166	-1.0%

Source: Real Estate Business Intelligence

AVERAGE HOUSING PRICES

	Reporting Period	Current Month	Last Period	Last Year	Annual Change
Single Family Detached	Jun-25	\$1,542,569	\$1,482,896	\$1,481,573	4.1%
Single Family Attached	Jun-25	\$990,600	\$945,195	\$1,035,801	-4.4%
Condominium	Jun-25	\$473,472	\$522,220	\$571,237	-17.1%

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	Jun-25	78.6%	72.9%	75.6%	-3.6%
RevPAR	Jun-25	\$166.05	\$152.56	\$157.58	-3.2%
Average Daily Room Rate	Jun-25	\$210.85	\$207.76	\$204.60	1.5%

Source: Amadeus Hospitality

CONSUMER PRICE INDEX (CPI-U)

	Reporting Period	Current Month	May 2024	July 2023	Annual Change
Washington • Arlington • Alexandria (DC, MD, VA, WV)	May-25	321.6	320.6	315.7	1.9%

Source: U.S. Bureau of Labor Statistics

RETAIL SALES (TAXABLE)

	Reporting Period	Current Quarter	Prior Quarter	1Q Prior Year	Annual Change
Arlington	1Q 2025	\$855,642,528	\$893,518,410	\$821,541,614	4.2%

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	Jun-25	24,310	147,470	147,749	-0.2%
Total Passengers	Jun-25	2,161,025	12,198,115	12,982,793	-6.0%

Source: Metropolitan Washington Airports Authority

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