Seattle 2035

Comprehensive Plan

URBAN VILLAGE INDICATORS MONITORING REPORT

2018

Seattle
Office of Planning &
Community Development

Contacts & Acknowledgements

The Comprehensive Plan Urban Village Indicators Monitoring Report was prepared by the Office of Planning and Community Development (OPCD), June 2018

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Executive Summary

Housing and Employment Growth

Seattle 2035, the City's current 20-year Comprehensive Plan mandated under the Washington State Growth Management Act, was adopted in 2016. The long-range modeling used to develop the Plan anticipated the city to grow by at least 70,000 housing units and 115,000 jobs between 2015 and 2035. The growth estimates help the City plan zoning and infrastructure sufficient to serve that growth.

New housing is essential to accommodate the current rapid pace of population growth and enable households of different sizes and income levels to live in the city. To encourage better access to services, transit, and employment over the next 20 years, Seattle's Growth Strategy directs 84 percent of housing growth to urban centers and urban villages. Along with concentrating growth in centers and villages, the Growth Strategy focuses public capital investments in these neighborhoods.

Half of the city's housing growth, along with nearly 60 percent of employment growth, is guided to the city's six urban centers. These neighborhoods serve as regional centers as well as offering the densest mix of housing and job opportunities within the city. Most of the city's remaining growth is directed to urban villages.

Focusing residential and employment growth in urban centers and urban villages provides walkable access to neighborhood services, enhances the ability of transit to serve commuters efficiently, and reduces greenhouse gas emissions. The strategy also supports successful neighborhood commercial districts and existing industry clusters.

In the City's Growth and Equity Analysis, published in May 2015, we identified urban villages where there is a high risk that current residents could be displaced from their homes due to development pressures. To reduce those pressures, the Comprehensive Plan assigns a lower expected housing growth rate to urban villages with high displacement risk.

HOUSING GROWTH

The first two years of the planning period are part of a phenomenal period of housing growth that began in 2013.

The pace of housing growth in Seattle during the first two years of the planning period far exceeded the expected 20-year average. Between the beginning of 2016 and the end of 2017, the city added over 15,000 housing units, increasing its existing housing supply by 5 percent. *The units added in the first two years of the planning period equate to 22 percent of the expected twenty-year growth.* By year-end 2017, the city contained over 351,000 housing units.

While the pace of development in Seattle is faster than expected, the general *distribution* of the city's housing growth thus far in the planning period is similar to what the Seattle 2035 plan expects for the twenty-year planning period, with 86 percent of the city's housing growth having happened in urban centers and villages.

Between January 2016 and December 2017, Downtown's housing stock grew by roughly 3,000 units or 12 percent. The neighboring South Lake Union urban center added roughly 2,100 housing units—expanding the housing stock in that center by 46 percent. In contrast, the number of housing units in Northgate barely budged.

Housing growth rates in urban villages also varied, with the fastest growth generally occurring in residential urban villages with very good transit service. Some urban villages with high displacement risk—23rd & Union Jackson, Columbia City, and North Beacon Hill—added housing at a very rapid rate, while other urban villages with high displacement risk added very little housing. Some of the other urban villages in the city also experienced low growth rates.

As of December 2017, there were nearly 21,500 housing units permitted, but not yet built. Depending on when these homes are built, it is possible we will have reached 52 percent of the city's 20-year housing growth estimate in just the first few years of the 20-year planning window.

In Seattle, as in other cities that have few vacant development sites, new development typically requires demolition of existing buildings. Analysis of recent permit data indicates that for every demolished housing unit, 8.5 new units were built. In urban centers and villages, the ratio of new units to demolished units was even higher, with 15 times as many units built for every unit demolished.

EMPLOYMENT GROWTH

As with housing growth, the pace of employment growth is greatly exceeding the average pace of growth anticipated in the Seattle 2035 Comprehensive Plan. *In just the twelve months beginning in March 2015, the city received almost one-fifth of the job growth anticipated for the entire 20-year planning period.* By March 2016, Seattle workplaces contained an estimated 590,000 jobs (not counting construction and resources jobs, the locations of which can be difficult to track.)

Sixty-nine percent of the growth between March 2015 and March 2016 occurred in urban centers, surpassing the 58 percent share expected in the Comprehensive Plan. The fastest growing job center was South Lake Union, with 5,300 new jobs—14 percent growth in just one year. Other areas have seen less than expected growth. The number of jobs in the Duwamish and Ballard-Interbay-Northend manufacturing/industrial centers declined.

Affordability

Although recent years have seen record levels of housing development, that development was outpaced by the growing demand for housing associated with the booming economy. The rent increases that accumulated over recent years have made it very difficult for low-income households to live in our city. About seven in ten low-income renter households in Seattle are shouldering unaffordable housing costs, and roughly four in ten low-income renter households are spending more than half of their income for housing costs.

The City has adopted a goal to “make it possible for households of all income levels to live affordably in Seattle and reduce over time the unmet housing needs of lower-income households in Seattle.” Many governmental and non-governmental entities are working to increase the supply of income-restricted affordable housing in Seattle.

The City’s housing strategies include a variety of approaches to boost construction and preservation of market-rate affordable housing. To gauge affordability levels existing in the market, we look at the minimum household income level that a household would need to afford rent and basic utilities. (Using a common standard, our analysis of the market considers housing to be affordable if it consumes no more than 30 percent of household income.)

- Market-rate apartment units in medium to large complexes (i.e., those with 20 or more units) are largely unaffordable to low-income households. In 2016, the median rent being paid for a 1-bedroom apartment in these complexes required a household income of 103 percent of the area median income to be considered affordable. Units in complexes with 20 or more units make up the majority of newly constructed housing and are a growing share of rental units in the city.
- Rents for market-rate units in smaller multifamily properties tend to be lower than rents in medium to large complexes (in part because the smaller properties are less likely to have been constructed very recently). For example, a one-bedroom apartment in a small apartment complex is affordable to a household with an income of 76 percent of area median income. Still, most units in small multifamily rental properties are unaffordable with an income of 60 percent of AMI.
- Rental units with two or more bedrooms are a small and diminishing share of the rental housing supply and are less likely than studio and one-bedroom units to be affordable at low-income levels.
- The affordability of market-rate rents varies greatly within our region. Within Seattle, 21 percent of the market-rate apartment units in medium to large complexes are affordable at 80 percent of AMI compared to 44 percent that are affordable at this income level in the four-county Puget Sound region.

Having a sufficient supply of income-restricted affordable housing for low-income families and individuals is key to advancing goals in the Comprehensive Plan for affordability and inclusivity.

- From the beginning of 2016 to March 31, 2018, the number of income-restricted housing units in the city increased by about 1,600. As of March 2018, there are approximately 29,400 income-restricted housing units in the city.
- As of March 2018, approximately 2,500 additional income-restricted affordable units are in development with support from a variety of funding sources including the Seattle Housing Levy. This statistic does not include income-restricted affordable units that will be included in otherwise market-rate buildings through the Multifamily Tax Exemption, housing bonus, and Mandatory Housing Affordability programs.
- About 82 percent of the rent- and income-restricted units existing in Seattle as of March 2018 are inside urban centers and villages. *Nearly all* (99%) of the growth between January 1, 2016 and March 31, 2018 in the supply of rent- and income-restricted units occurred within urban centers and villages.

Livability

For the city's transit-oriented development strategy to be effective, residents must have access to frequent transit near their homes. Service investments in Metro and expansion of the Sound Transit light rail system are helping improve access. By 2025 (ten years into the Comprehensive Plan's 20-year planning period), the City is aiming for transit running every 10 minutes or more often to be accessible within a half-mile walk to at least 72 percent of Seattle households.

As of the fall 2017, 64 percent of housing in the city is within a half-mile walk of transit running every 10 minutes or more frequently; this is up from 51 percent in 2016. A large majority—84 percent—of housing in urban centers and villages is within a half-mile walk of 10-minute transit. While there is notable variation among individual urban centers and villages in access to 10-minute transit service, all, or very nearly all, of the housing in each of the city's urban centers and urban villages, except one village, has access to 15-minute service. The exception is the Admiral urban village in West Seattle.

Walkability is essential for ensuring that urban centers and villages function well for residents, and sidewalks are a basic ingredient for making neighborhoods walkable. In the city as a whole, about 85 percent of City's priority sidewalk blockfaces have complete sidewalks; within urban centers and villages, about 89 percent do. The greatest concentration of missing sidewalks is north of N 85th Street, but several urban villages in south Seattle also have low rates of sidewalk completion.

Access to parks, open space, and recreational facilities promotes people's physical, social, and mental wellbeing. An estimated 94 percent of the city's homes are within a half-mile (approximately 10-minute) walk of a park or recreational facility owned or maintained by Seattle Parks and Recreation.

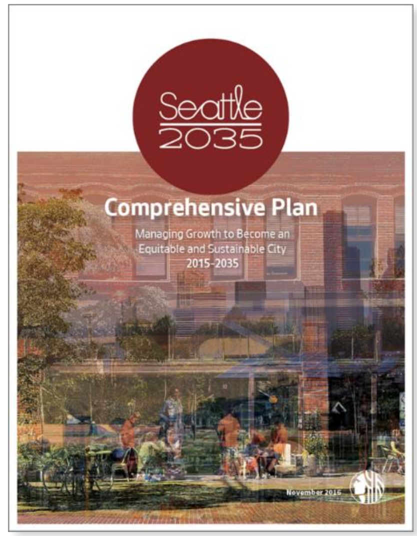
The City's 2017 Parks and Open Space Plan identifies neighborhoods that are priorities for future acquisition of land based on gaps in walkable access to parks and recreational facilities and based on additional factors including social equity, public health, population density, and the feasibility of land acquisition. Priority areas include the Northgate urban center; the First Hill and 12th Avenue neighborhoods in the First Hill/Capitol Hill urban center; five of the city's six hub urban villages; and several residential urban villages.

The Parks and Open Space Plan incorporates many strategies in addition to acquisition. City departments are working together and involving community partners to identify innovative strategies to meet neighborhood needs for recreational and outdoor space.

Introduction

This is the first in a series of periodic monitoring reports that will track growth and gauge progress in implementing the 20-year Seattle 2035 Comprehensive Plan.

Seattle's Comprehensive Plan and the importance of monitoring



Seattle's Comprehensive Plan is our City's guide for managing growth over the next twenty years. Since the Plan was first adopted in 1994, it has provided the overall vision and policy framework that informs our work to enhance the livability of the city as we welcome new residents and jobs.

The City recently adopted a major update of the Plan: "Seattle 2035 Comprehensive Plan: Managing Growth to Become an Equitable and Sustainable City." The foundation of the Plan continues to be the Urban Village Strategy, which is set now forth in the Plan's Growth Strategy element. This strategy is designed to guide growth to the denser areas in the city that are best able to thrive on that growth while enabling the City to efficiently expand access to public services important for livability.

Monitoring is needed for the public and decision makers to identify how well the Comprehensive Plan Growth Strategy is working to guide growth and to assess whether the city is progressing in the way the Plan envisions.

Our approach to monitoring

The introduction to the Seattle 2035 Comprehensive Plan describes the City's approach to monitoring:

> Defining and Measuring Success
>
> There will always be ways the City can improve to meet changing needs and to address ongoing concerns. Because of the changing nature of our region and our city, the success of this Plan is not measured by an ideal end state. Instead, success is measured by whether we are moving in the directions the Plan lays out.
>
> The Plan covers many topics in several chapters, and monitoring progress on every one of those topics would be a time-consuming and demanding task. To simplify the monitoring process, the City has identified several indicators that will provide insights about progress on key issues addressed by the Plan. The City will collect baseline data and track these indicators over time. Indicators will be tracked for the city as a whole and for each urban village, as feasible, to help assess progress in implementing the Growth Strategy. The City will report regularly on changes in these indicators to help the public and elected officials judge the effectiveness of the Plan and the City's actions to implement it.

The report is divided into three sections: Growth, Affordability, and Livability. Each section includes indicators for multiple topics.

- The section on growth presents indicators on both housing growth and employment growth,
- The section on affordability includes indicators on housing dedicated to serving low-income households as well as the affordability of market-rate housing.
- The section on livability contains indicators on access to transit, sidewalks, and parks and open space.

Each of the indicators has been selected to provide meaningful information on how the city is growing and progressing relative to the Plan's goals and policies. However, each of these indicators has limitations and tells only a partial story. Along with the indicators, we've provided links to City webpages that supply additional information on community conditions and the ways in which the City is working to implement Plan policies and goals.

We'll be updating several of the indicators, including housing and employment growth, on an annual basis. We'll be reporting somewhat less frequently on other indicators, such as the presence of sidewalks and access to parks and open space, for which large changes are not expected on an annual basis.

We plan to produce another full report on all of the indicators in 2021 to inform the next major update of the Comprehensive Plan, which is scheduled to occur in 2023. In other years, updated indicators will be reported online in a streamlined format.

In general, we consider the monitoring period for the 2035 Plan to run from the beginning of 2016 to the end of 2035. However, the timing of data availability and other practical considerations necessitate differences between some of the indicators in the time periods we report.

This first report establishes the indicators we are monitoring and provides baseline data on these indicators for the beginning of the Seattle 2035 Comprehensive Plan's 20-year planning period. Reporting on change over time in this initial report was, however, a priority for some of the indicators: most notably for the housing growth and employment growth indicators. For housing, this report captures two full years of growth (from the beginning of 2016 to the end of 2017). However, the lag with which employment data becomes available limits our first report to just one year's worth of job growth (from March 2015 to March 2016).

A note on urban centers and villages

The Introduction in the Comprehensive Plan describes the roles that the four different types of urban centers and villages play in the City's Growth Strategy:

> "**Urban centers** are the densest Seattle neighborhoods. They act as both regional centers and local neighborhoods that offer a diverse mix of uses, housing, and employment opportunities.
>
> **Hub urban villages** are communities that offer a balance of housing and employment but are generally less dense than urban centers. These areas provide a mix of goods, services, and employment for their residents and surrounding neighborhoods.
>
> **Residential urban villages** are areas of residential development, generally at lower densities than urban centers or hub urban villages. While they are also sources of goods and services for residents and surrounding communities, for the most part they do not offer many employment opportunities.
>
> **Manufacturing/industrial centers** are home to the city's thriving industrial businesses. Like urban centers, they are important regional resources for retaining and attracting jobs and for maintaining a diversified economy."

The map in Figure 1.1 shows the location of the city's urban centers and urban villages. While centers and villages are established based on guidelines in the Comprehensive Plan, individual urban centers and villages vary substantially in shape and size. The Plan's Appendices provide background information on land area, land use, density, development capacity, and other attributes for each of the urban centers and villages.

Prior to the "Seattle 2035" update to the Plan, some of the city's urban centers were segmented into urban villages. Although no longer designated as separate urban villages, the names of these areas are still sometimes used to refer to neighborhoods within urban centers. (See the map in Figure 1.2.) Data reported for some of the indicators in this report include disaggregated data for neighborhoods within centers.

Zoning places strict limitations on residential uses in the city's manufacturing/industrial centers. We include statistics pertaining to manufacturing/industrial centers in several of the tables in this report. In some cases, this is for statistical completeness, i.e., to show numbers adding to 100 percent of totals.

Demographic context

Area demographics are helpful to consider when evaluating indicator findings. The links below provide counts and basic characteristics about people, households, and housing in the city as a whole and in individual urban centers and urban villages. The information provided is from the U.S. Census Bureau's 2010 Census. We'll update this information once data from the 2020 Census become available.

The decennial Census provides estimates down to the Census block level, which allows us to tabulate statistics for areas that correspond closely with urban villages and centers. The Census Bureau's American Community Survey provides estimates on a broader set of demographic and related characteristics; however, these estimates are not geographically detailed enough or accurate enough to reliably represent urban villages.

The first three links below provide access to tabular reports. The urban center and village geographies used to tabulate these estimates are approximations based on combinations of census blocks. The fourth link is to a reference map that shows the relationship of urban centers and villages to census tract boundaries established with the 2010 Census.

- Basic Population and Housing Unit Characteristics for Urban Centers and Villages 1990, 2000, and 2010 (PDF)
- Census 2010 Urban Centers and Villages Subject Report report (Population, Households, Housing) (PDF)
- Census 2010 Urban Centers and Villages Subject Report (Excel)
- 2010 Census Tracts and Urban Centers and Villages Reference Map (PDF)

Figure 1.1 (Reference Map)

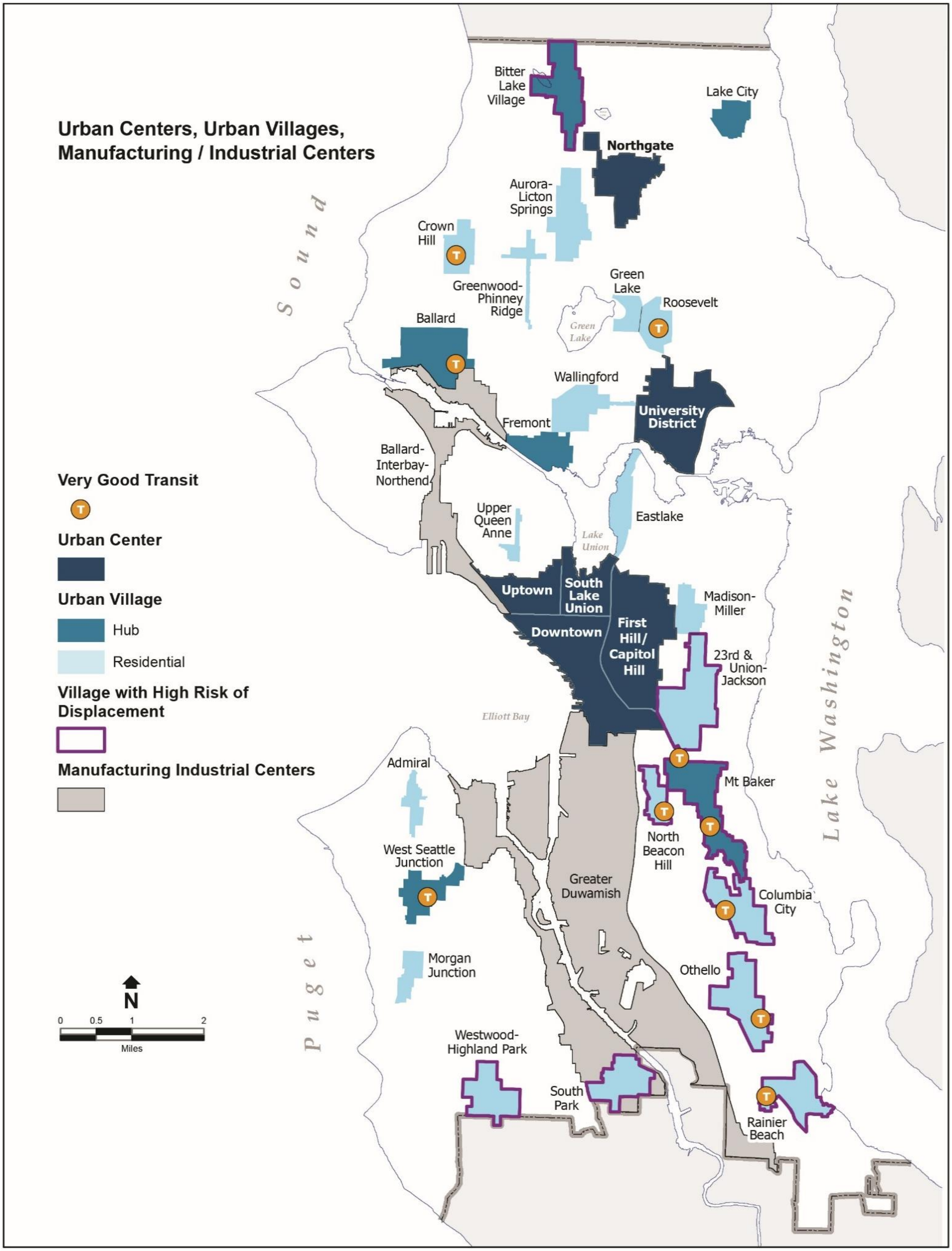
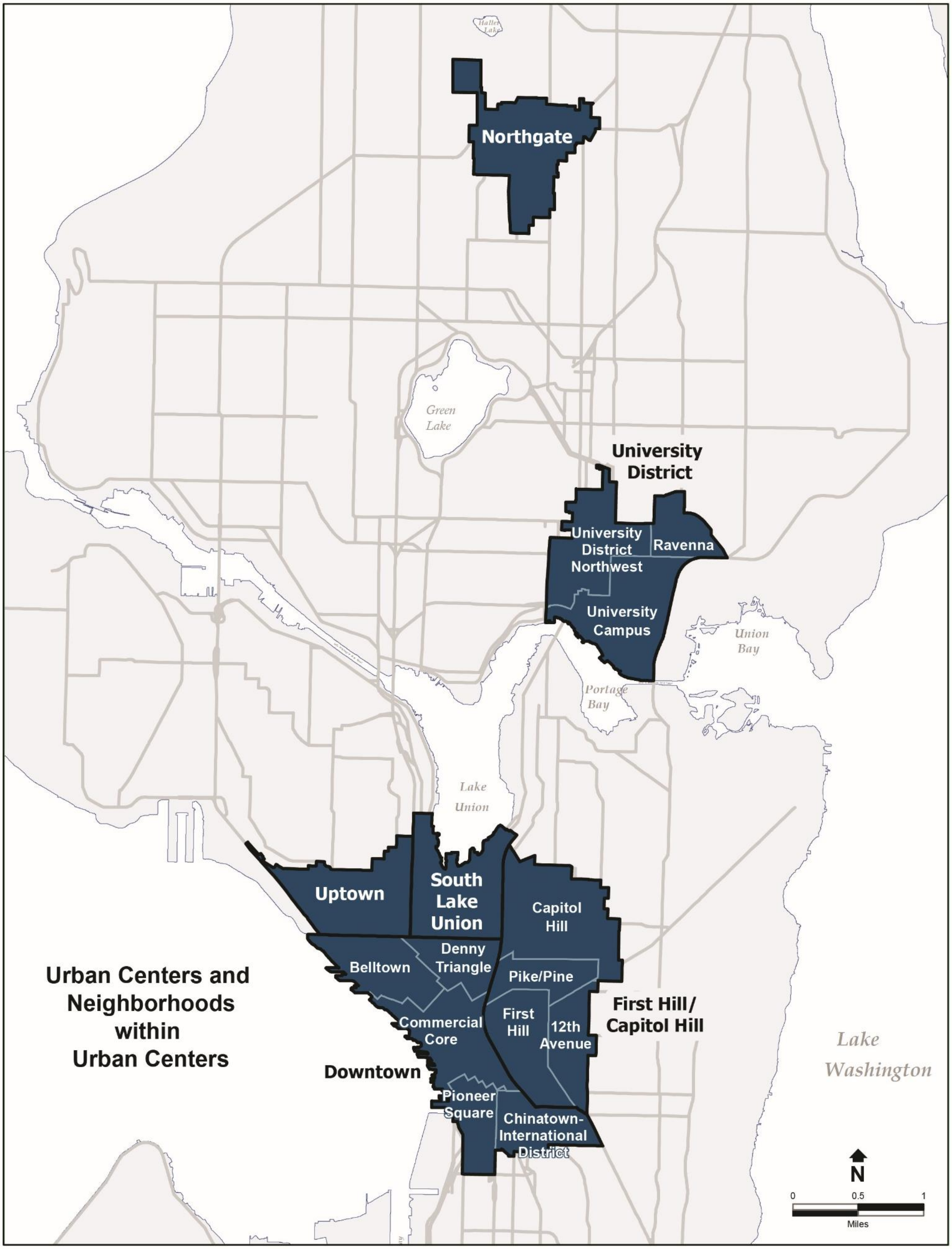


Figure 1.2 (Reference Map)



Section 1: Housing and Employment Growth

Broad context

Seattle 2035, the City's current Comprehensive Plan, anticipates and plans for the city to grow by at least 70,000 housing units and 115,000 jobs between 2015 and 2035.

Seattle's Growth Strategy directs half of the city's housing growth and nearly 60 percent of our employment growth to six urban centers—areas of the city that have the greatest residential and employment densities and access to the regional transit network.

Our Growth Strategy guides most of the remaining residential growth and non-industrial job growth to hub urban villages, where people live close to concentrations of services and jobs; and to residential urban villages, where retailers and services mainly serve the nearby population. In these areas, emphasis is also on locating growth near transit, with anticipated growth calibrated to help reduce the risks of displacement that can accompany growth. (For reference, maps on the two preceding pages in Figures 1.1 and 1.2 show the locations of each urban center and urban village, and the neighborhoods within urban centers.)

As we complete this report, we are only a small fraction of the way into the current twenty-year planning period. Examining the recent data on housing and employment growth helps us understand the dramatic rate of change and emerging patterns of development in the city. However, the future is uncertain and the pace of growth in recent years may not predict the pace in coming years. The City will continue to monitor actual development as a key consideration in shaping the next major Comprehensive Plan update in 2023.

How GMA Shapes the Way Seattle Plans for the Growth

As required by the Washington State Growth Management Act (GMA), Seattle and other cities in King County share in accommodating population growth forecasted by the state. In King County, cities also adopt allocations for projected employment growth, which facilitates integration of planning for housing, jobs, and transportation.

The King County Countywide Planning Policies lay out a collaborative process by which policymakers allocate projected growth to cities. While the Washington State Office of Financial Management provides the county population forecast on which the residential allocation of growth is based, the Puget Sound Regional Council (PSRC) supplies the employment projection that is divvied up in the allocation process.

In highly-populated areas, GMA also requires adoption of a regional plan to provide a shared framework for guiding growth. In our region, PSRC's VISION 2040 provides this framework.

The topics and indicators we're monitoring

HOUSING GROWTH

The housing growth indicators we are tracking compare the housing growth that has occurred since the beginning of the current twenty-year planning period with the amount and distribution of housing growth anticipated in the Comprehensive Plan.

EMPLOYMENT GROWTH

The employment growth indicators compare the job growth that has occurred during the current planning period with the amount and distribution of job growth anticipated in the Plan.

For both housing growth and employment growth, this—our first monitoring report—includes a look back at previous planning periods to see how Seattle's actual growth has compared with prior growth estimates. This is to offer a long-range perspective to keep in mind as we examine the extraordinary growth Seattle has experienced thus far in our current planning period.

Housing Growth

Adding housing is essential to accommodate population growth. Growing our housing supply is also necessary to help advance affordability and enable households of different sizes and income levels to live in the city.

Concentrating housing growth as envisioned in the Plan will enable our urban centers and villages to function as increasingly complete neighborhoods—neighborhoods where residents can easily walk or take transit to get to jobs and services, and to meet their other daily needs.

Key policy guidance

The state GMA requires that cities' comprehensive plans show how they will accommodate their expected share of population growth. In King County, the Growth Management Planning Council reviews the state forecast and the regional plan to allocate shares of expected growth to each city. Each city then incorporates those growth estimates into its comprehensive plan as the minimum amount of growth the city needs to serve with zoning, infrastructure, and utilities. **The Growth Strategy in Seattle's Plan identifies the amount of housing growth the City is anticipating over the 20-year planning period and lays out how our Urban Village Strategy will continue to guide the distribution of growth.** Estimating future growth enables the City to identify whether current zoning allows that many units and helps the City plan for the infrastructure needed to serve growth. If actual growth is higher than expected growth, the City may need to make adjustments to accommodate it with the next major update of the Comprehensive Plan due June 2023.

The Land Use and Housing elements of the Comprehensive Plan work with the Growth Strategy to guide how the City addresses housing needs associated with growth. The Land Use element guides zoning and development regulations shaping the location and types of housing that can be built, and the Housing element establishes policies to address the housing needs of households of all types and incomes.

Links to some of the relevant goals and policies in Seattle's Comprehensive Plan:

Growth Strategy

GS G1
GS 1.1
GS 1.8
GS G2
GS 2.1
GS 2.3
GS 2.6

Land Use element

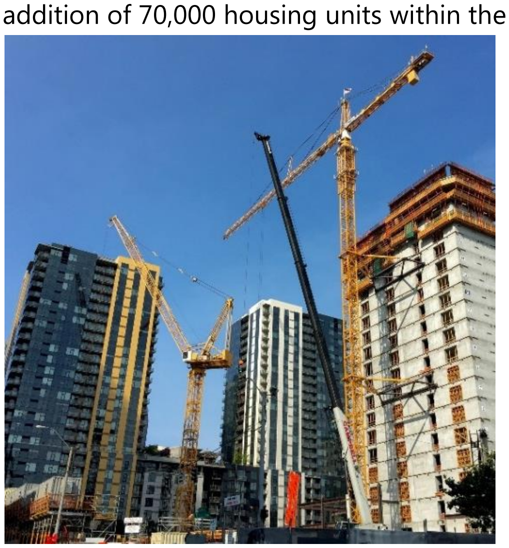
LU G1
LU 1.2
LU 1.3
LU G8
LU 8.1

Housing element

H G2
H 2.1
H 2.3
H 2.5

ANTICIPATED HOUSING GROWTH:

Growth anticipated in the city as a whole—Seattle's Comprehensive Plan Growth Strategy anticipates the addition of 70,000 housing units within the city as a whole over the twenty-year planning period.



Distribution of growth—The Plan expects 84 percent of the city's overall housing growth during the 20-year planning period to occur in urban centers and urban villages, with 50 percent of the overall growth going to urban centers, and 34 percent going to urban villages.

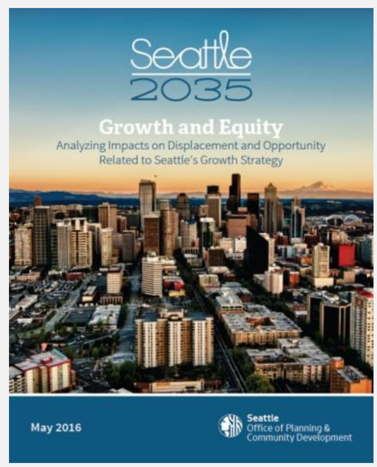
Growth anticipated in urban centers—Urban centers play an especially important role in citywide and regional growth management planning. The four-county Puget Sound Region contains twenty-nine such centers, six of which are in Seattle. Consistent with the Regional Growth Strategy, Seattle's Comprehensive Plan lays out 20-year housing and employment growth estimates for each of our city's urban centers.

Growth anticipated in urban villages—For hub and residential urban villages, the Seattle 2035 Plan places a greater emphasis on growth near transit and incorporates lower growth rates in some areas to mitigate risks of displacement that can accompany growth. Specifically:

- Housing in urban villages with "very good transit service" is expected to grow at a greater rate than housing in areas without that service. (For this purpose, "very good transit" means either a light rail station or a RapidRide bus stop plus at least one other frequent bus route.)
- In urban villages with high displacement risk, the Plan assigns a lower expected housing growth rate regardless of transit service levels. Places with high displacement risk were identified in the Growth and Equity Analysis, which the City published in May 2015. (See sidebar.)

Displacement Risk estimated in the 2015 Growth and Equity Analysis

> "By combining data on vulnerability, amenities, development potential, and rents, the displacement risk index identifies areas where displacement of marginalized populations may be more likely."



The measurement of Displacement Risk incorporated the following factors:

- Vulnerability: Populations less able to withstand housing cost increases and more likely to experience discrimination or other structural barriers to accessing housing.
- Amenities: Potential contributors to real estate demand including access to transit, proximity to certain core businesses, and adjacency to gentrifying affluent neighborhoods.
- Estimated development capacity: How much future development could exist parcel by parcel under current zoning, which suggests the potential location and scale of future development.
- Market-rate rent: Comparison of neighborhood rents to rents in the city as a whole, which can suggest the extent to which new market-rate development could affect current rents in the neighborhood.

Indicator: Housing growth in the city as a whole

To monitor housing growth, we use the numbers from the Office of Planning and Community Development's (OPCD's) "Urban Center/Village Housing Unit Growth Report," which tracks construction permit data. Growth in the number of housing units is calculated by counting new units and subtracting demolished units.

What the data show

Seattle has added an unusually high number of housing units thus far in the 2016 to 2035 monitoring period for the current Comprehensive Plan.

- **As shown in Figure 1.3, between the beginning of 2016 and the end of 2017, Seattle added over 15,000 housing units to the 336,000-unit housing supply that existed at the end of 2015.**
  - In 2016, the first year in the monitoring period, the city added 6,487 units.
  - In 2017, the city added 8,753 units.

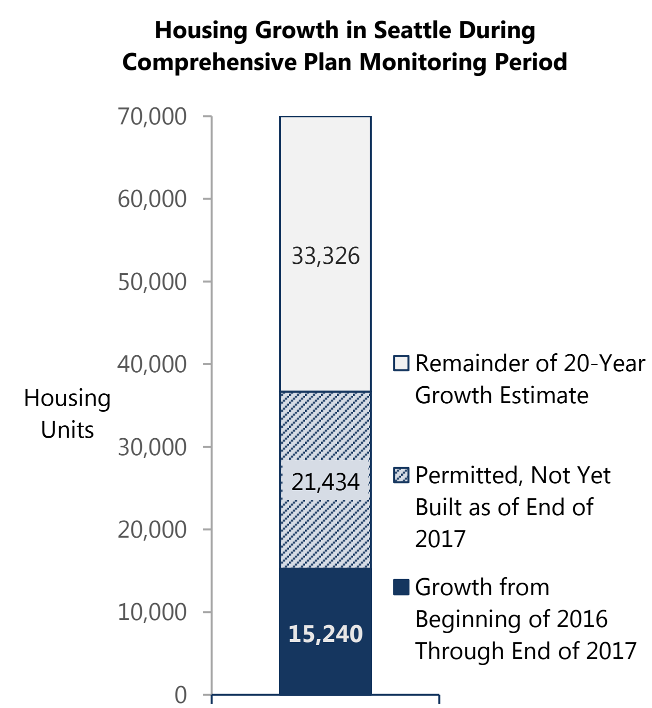
  These statistics reflect Seattle's strong economy and continue an extraordinary period of historically high rates of development. The number of housing units added in 2017 is higher than the number added in any other year since the 1994 adoption of Seattle's original Comprehensive Plan.

  As of year-end 2017, Seattle had about 351,000 housing units.

- ***The housing units added in the first two years of the current planning period equal 22 percent of the 20-year growth estimate of 70,000 housing units.*** This is well over twice the growth we would expect during this period if the city were to add the same number of units each year to reach the 20-year growth estimate.

- **As of the end of 2017, there were nearly 21,500 housing units permitted, but not yet built.** While most of these units are likely to get built, this may take several years. ***Summing the units built during 2016 and 2017 with units in the pipeline yields over 36,500 units, or 52 percent of the city's twenty-year growth estimates.***

Figure 1.3



Sources: Seattle 2035 Comprehensive Plan growth estimates and Office of Planning & Community Development (OPCD) analysis of building permit data maintained by Seattle Department of Construction and Inspections (SDCI).

Note: Growth refers to new units minus demolished units.

Access updated data on housing growth:

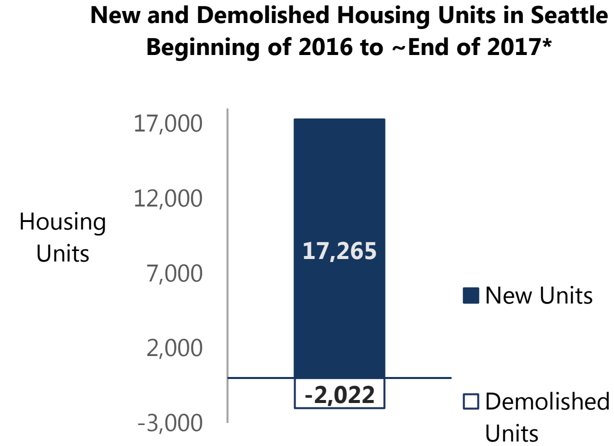
The "Urban Center/Village Housing Unit Growth Report" is updated on a quarterly basis and is available on OPCD's Population and Demographics website.

Residential Permit Reports and an interactive map displaying permit locations are also available on the OPCD website.

During the monitoring period, 8.5 times as many units were built as were demolished. As shown in Figure 1.4, from the beginning of 2016 to roughly the end of 2017, approximately 17,260 new housing units were built citywide, while about 2,020 housing units were demolished.

- **In urban centers and villages, the ratio of new units to demolished units was even higher, with 15 times as many units built for every unit demolished**.

Figure 1.4



Sources: Seattle 2035 Comprehensive Plan growth estimates and OPCD analysis of building permit data maintained by SDCI.

*Note: Because this chart is based on a permit report run on 1/2/2018 rather than the end of 2017, the net growth shown here is is slightly different from that shown in the previous figure.

As we think about the tremendous growth that has occurred in recent years, it is important to keep in mind that the pace of growth varies with development cycles and can change quite a bit over the course of a 20-year planning period.

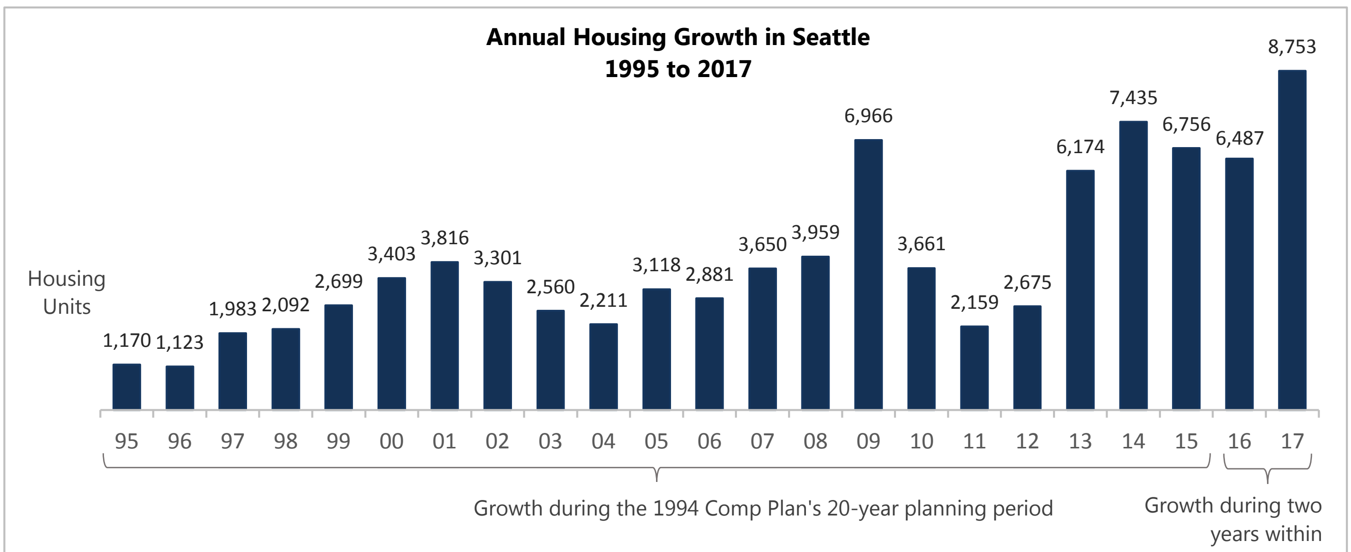
While there is uncertainty about how much longer rapid growth will be sustained and whether similarly rapid rates of growth will be repeated later in the planning period, data on units in the pipeline suggests continued robust growth over the next several years.

Planning for growth is a continual process. In anticipation of the next major update to the Comprehensive Plan, which is required by 2023 under the state Growth Management Act, the City will work with the Puget Sound Regional Council and King County to ensure that regional and countywide policies and targets reflect the extraordinary amount of growth seen in recent years in Seattle. The City will continue to collect and analyze data on residential development activity compared to what was anticipated in the plan, and will complete a full update of the Urban Village Indicators Monitoring Report in 2021.

Perspective on how annual housing growth in Seattle has varied over time

Year to year variation in housing growth is illustrated in the chart in Figure 1.5. The chart shows annual growth in the number of housing units in Seattle from 1995 to 2017. Dramatic swings in the housing market punctuated the last decade, with a steep decline in residential development in the aftermath of the Great Recession followed by a steep increase that began the current five-year stretch of rapid growth.

Figure 1.5



Sources: OPCD analysis of building permit data maintained by SDCI.
Note: Growth refers to new units minus demolished units.

Indicator: Share of the city's growth in urban centers and urban villages

What the data show

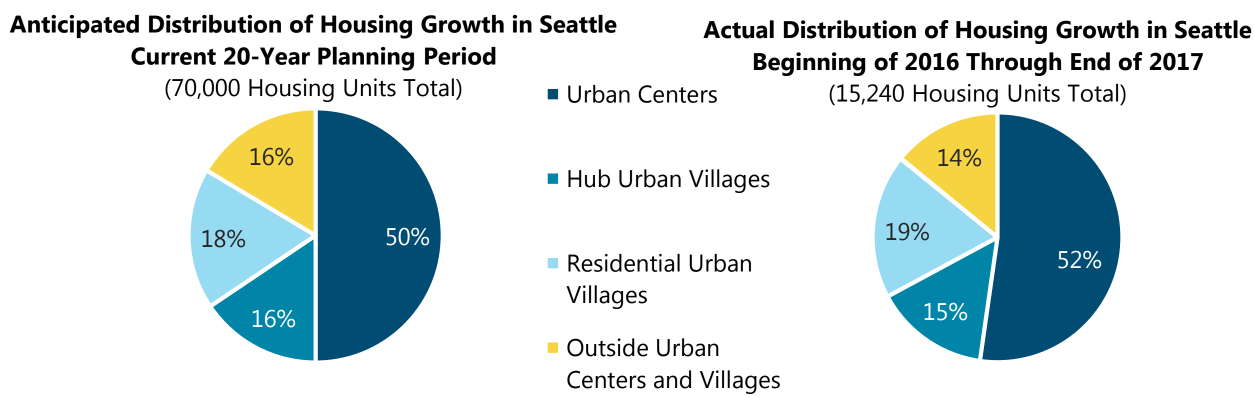
Thus far, the distribution of Seattle's housing growth is strikingly like what the Plan expected for the twenty-year planning period.

- **As envisioned by the Plan's Growth Strategy, the large majority of Seattle's housing growth since the beginning of 2016 has occurred in urban centers and villages.**
- **At 86 percent, the share of residential growth that happened in centers and villages has been somewhat higher than the 84 percent share the Plan anticipated.**
- **At 52 percent, the share of growth that went to urban centers was also somewhat higher than the 50 percent anticipated.**

Seattle is only two years into the 20-year planning period. We will need to accumulate additional experience to get fuller insight into the success of the urban village strategy under the current Comprehensive Plan.

Figure 1.6

Distribution of Residential Growth in Seattle During Comprehensive Plan Monitoring Period



Sources and notes: see Table 1.1 below.

Table 1.1

Distribution of Housing Growth in Seattle During Comprehensive Plan Monitoring Period

	20-Year Growth Estimates (Beginning of 2016 to End of 2035)	Share of City's 20-Year Housing Growth Anticipated Inside These Areas	Growth in Housing Units Beginning of 2016 to End of 2017	Share of City's 2016-2017 Housing Growth That Occurred Inside These Areas
Seattle as a whole:	**70,000**	**100%**	**15,240**	**100%**
Inside Urban Centers and Urban Villages:	**58,500**	**84%**	**13,091**	**86%**
Urban Centers	35,000	50%	7,976	52%
Hub Urban Villages	10,900	16%	2,272	15%
Residential Urban Villages	12,600	18%	2,855	19%
Manufacturing Industrial Centers	N/A	N/A	-12	0%
Total Outside Urban Centers & Villages	**11,500**	**16%**	**2,149**	**14%**

Sources: Seattle 2035 Comprehensive Plan growth estimates and OPCD analysis of building permit data maintained by SDCI.

Notes: Growth refers to new units minus demolished units. Percentages may not add to 100% due to rounding.

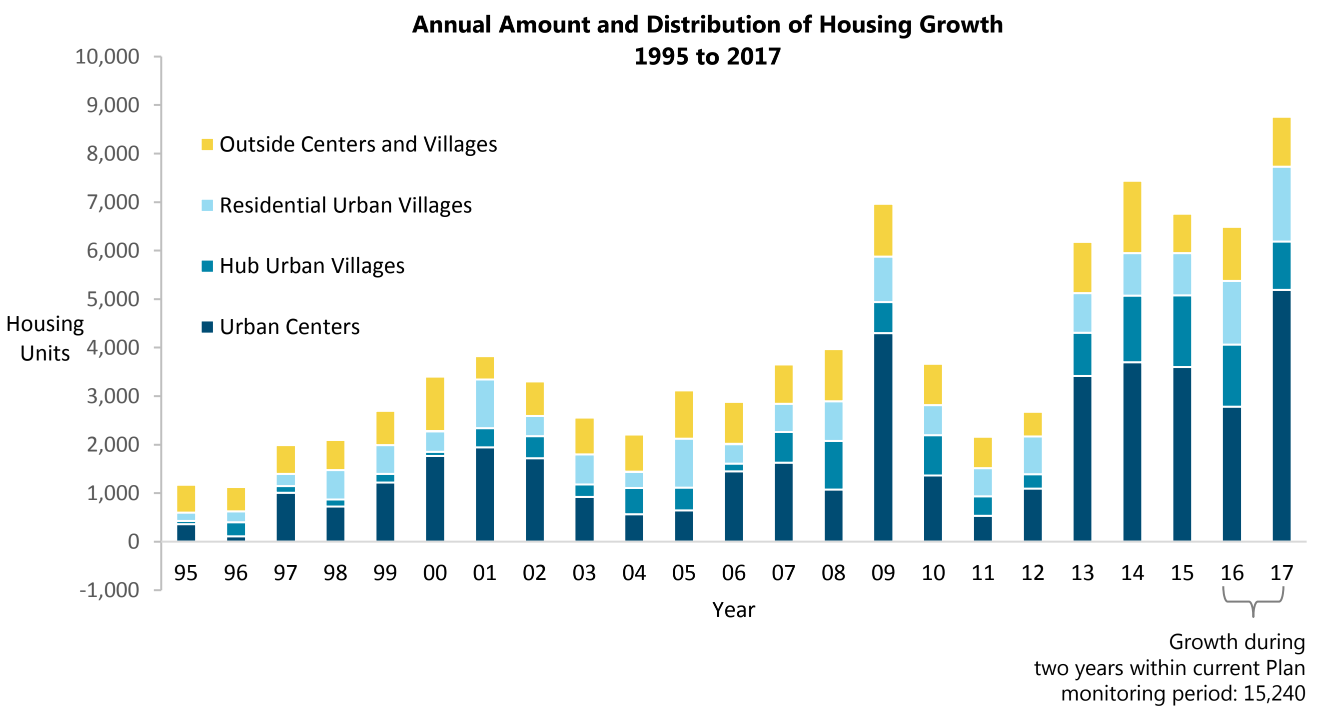
Perspective on how the annual distribution of housing growth in Seattle has varied over time

Not only the overall *amount* of housing growth, but also the *distribution* of that growth to urban centers and urban villages, has varied substantially over time.

- **Since 1995, the shares of the city's housing growth going to urban centers and to hub urban villages have generally trended upward while the share occurring outside of centers and villages has declined.** There has been no discernable trend up or down in the proportion of growth happening in residential urban villages.
- **The share of housing growth going to urban centers has generally been greatest during years when Seattle saw large overall amounts of housing growth.** For example, roughly 60 percent of the net new units in 2009 (when a large amount of housing started shortly before the Great Recession was completed), and in 2017 were added in urban centers.


View of Downtown from roof of Joule Apartments in Capitol Hill

Figure 1.7



Sources: OPCD analysis of building permit data maintained by SDCI.
Note: Growth refers to new units minus demolished units.

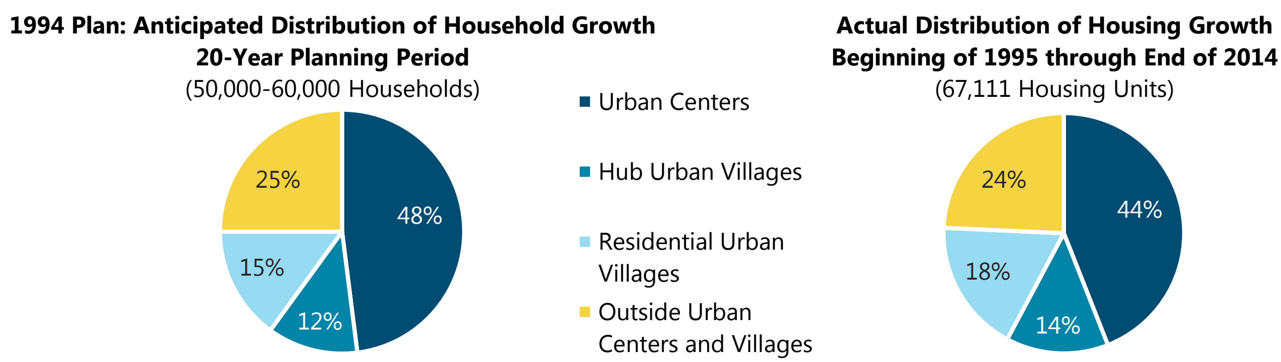
A look back at the distribution of housing growth in previous planning periods

Comparing the growth that occurred during previous planning periods with the growth we were expecting provides context for viewing our current growth as well as a longer perspective on how the urban village strategy has performed.

Seattle's 1994 Plan projected that the city would grow by 50,000 to 60,000 households over the 20-year planning period and indicated the shares of that growth the City anticipated for urban centers, hub urban villages, and residential urban villages. **In the 20 years following the original Plan's adoption (from the beginning of 1995 to the end of 2014), more than 67,000 net new housing units were added in the city, with that growth distributed in roughly the same proportions as anticipated in the original Plan.**

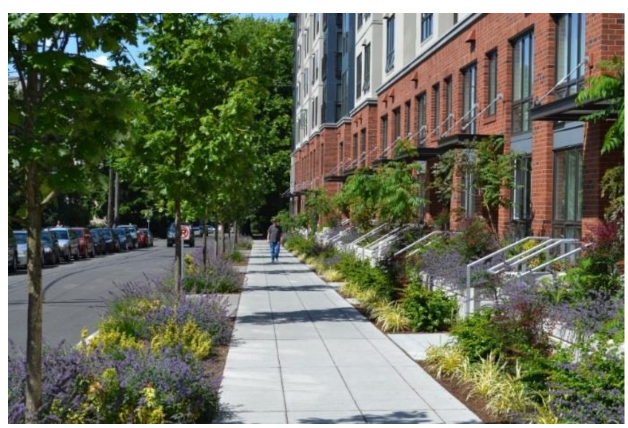
Figure 1.8

Distribution of Household/Housing Growth in Seattle During the 1994 Plan's 20-Year Planning Period



Sources: Seattle City "Comprehensive Plan: Toward a Sustainable Seattle;" and OPCD analysis of building permit data from SDCI.
Note: The 1994 Plan described anticipated growth in terms of households. For practical reasons, the City tracks growth in terms of housing units.

GMA requires cities in Washington to update their Comprehensive Plans on a periodic basis. The 2004 update of Seattle's Plan anticipated a slower rate of growth based on the state's GMA population forecast but a more aggressive shift of development to urban centers (associated in part with the change in South Lake Union's designation from a hub urban village to an urban center). The growth that occurred between the 2004 update and the 2016 update was faster than anticipated, but less concentrated in urban centers than expected.



Indicator: Housing growth in urban centers

What the data show

With the extraordinary development boom underway, most of Seattle's urban centers are moving rapidly toward their 20-year housing growth estimates.

> "A centers strategy is the linchpin for King County to achieve the Regional Growth Strategy."
>
> - King County Countywide Planning Policies

- From the beginning of 2016 through the end of 2017, the number of housing units added in Seattle's six urban centers totaled nearly 8,000, roughly 23 percent of their combined twenty-year growth estimate of 35,000.
- As of year-end 2017, about 10,500 additional units were in the pipeline for the city's urban centers—that is, they had been permitted, but were not yet built at that time. Combined with the units built since the beginning of 2016, the total is approximately 18,500 housing units. This is more than half the total housing growth expected in the centers over 20 years.

Individual urban centers are not sharing equally in the residential building boom. (Table 1.2 and Figure 1.9.)

- Urban centers with the most rapid housing growth are **Downtown** and **South Lake Union**.
  - Between the beginning of 2016 and the end of 2017, **Downtown's** housing stock grew by 12 percent, which is more than twice the 5 percent growth seen in the city as a whole.
  - **South Lake Union** now has about 46 percent more housing units than it did just two years prior. Adding units currently in the development pipeline would get the center two-thirds of the way to the amount of growth the Plan anticipated for the whole 20-year planning period.
- Residential development in **Northgate** lagged drastically behind that in other centers.
- Three urban centers—**First Hill/Capitol Hill, University District**, and **Uptown**—added housing at rates similar to, or somewhat above, the rate in the city as a whole.

Table 1.2

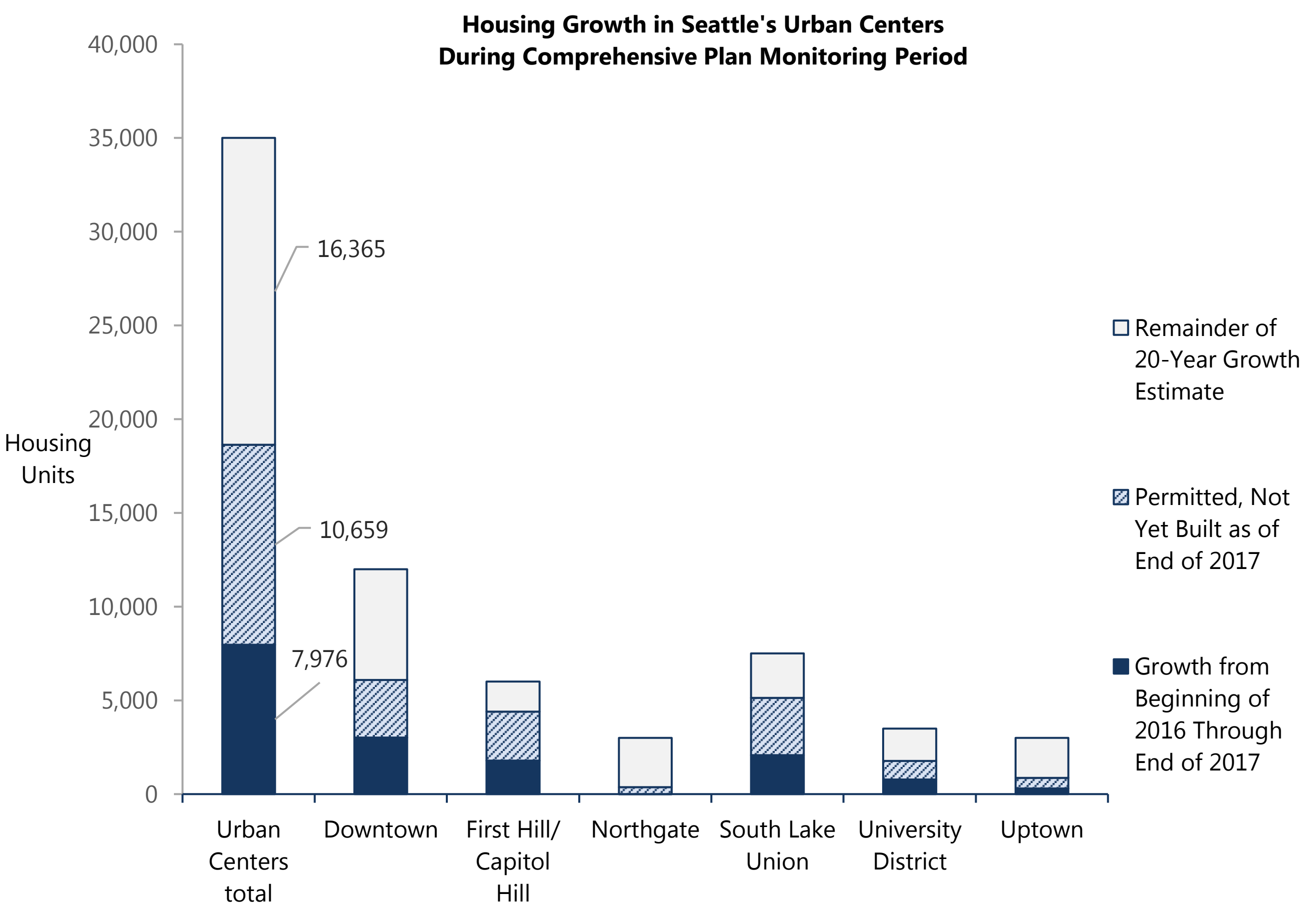
Housing Growth in Seattle and Its Urban Centers During Comprehensive Plan Monitoring Period

	Housing Units Existing as of 2015 Year-End	20-Year Growth Estimates (Beginning of 2016 to end of 2035)	Growth in Housing Units (Beginning of 2016 Through End of 2017)	Percentage Growth Beginning of (2016 Through End of 2017)	Housing Units Permitted, Not Yet Built as of End of 2017	Housing Units Built (2016 & 2017) + Housing Units Permitted, Not Yet Built
Seattle as a whole	**336,188**	**70,000**	**15,240**	**5%**	**21,434**	**36,674**
Urban Centers total:	**80,322**	**35,000**	**7,976**	**10%**	**10,659**	**18,635**
Downtown	24,347	12,000	3,015	12%	3,075	6,090
First Hill/Capitol Hill	29,619	6,000	1,792	6%	2,605	4,397
Northgate	4,535	3,000	3	0%	361	364
South Lake Union	4,536	7,500	2,073	46%	3,068	5,141
University District	9,802	3,500	787	8%	989	1,776
Uptown	7,483	3,000	306	4%	561	867

Sources: Seattle 2035 Comprehensive Plan growth estimates and Office of Planning and Community Development (OPCD) analysis of building permit data maintained by Seattle Department of Construction and Inspections (SDCI).

Note: Growth refers to new units minus demolished units.

Figure 1.9



Sources: Seattle 2035 Comprehensive Plan growth estimates and OPCD analysis of building permit data maintained by SDCI.

Note: Growth refers to new units minus demolished units.

Indicator: Housing growth rates in urban villages

What the data show

In general, Seattle's hub urban villages and residential urban villages both saw very high rates of housing growth between the beginning of 2016 and the end of 2017:

- The number of housing units in hub urban villages grew by 2,272 or 9.3 percent.
- The number of housing units in residential urban villages increased by 2,855 or 6.8 percent.

Based on the short amount of time elapsed in the current 20-year planning period, it is difficult to draw meaningful conclusions about whether housing growth rates in urban villages are varying by transit service and displacement risk categories in the way the Plan envisions.

The data indicate that thus far:

- **In aggregate, the fastest growth within urban villages occurred in residential urban villages categorized as having very good transit service.** Among all urban villages (outside urban centers), the **Roosevelt** residential urban village grew the fastest, adding 21 percent to its 2015 year-end housing count. Roosevelt also has more housing units in the development pipeline than any other urban village.
- **Rates of residential development varied greatly among individual urban villages, including in villages with high displacement risk.**
  - Three residential urban villages with high displacement risk—**Columbia City, North Beacon Hill, and 23rd & Union-Jackson**—saw housing growth that was notably faster than the overall 6.8 percent growth within residential urban villages. The number of housing units in these urban villages increased by 11 percent, 10 percent, and 8 percent respectively.
  - One hub urban village with high displacement risk—**Bitter Lake Village**—and three south Seattle residential urban villages with high displacement risk—**Rainier Beach, South Park, and Westwood-Highland Park**—had housing growth of one percent or less. These four urban villages are farther from the city's center than are the rapidly growing urban villages with high displacement risk.

Table 1.3

Percentage Growth in Urban Village Housing Units During Comprehensive Plan Monitoring Period

	Expected 20-Year Growth in Housing Units (2016 to 2035)	Growth in Housing Units Beginning of 2016 Through End of 2017
Hub Urban Villages:		**9.3%**
With very good transit service	60%	11.2%
Without very good transit service	40%	11.3%
With high displacement risk, regardless of the level of transit service	40%	2.7%
Residential Urban Villages:		**6.8%**
With very good transit service	50%	16.9%
Without very good transit service	30%	6.1%
With high displacement risk, regardless of the level of transit service	30%	5.9%

Sources: Seattle 2035 Comprehensive Plan growth estimates and OPCD analysis of building permit data maintained by SDCI.

Notes: Growth refers to new units minus demolished units. See Table 1.4 for additional details.

Table 1.4, on the following page, displays the 20-year Comprehensive Plan housing growth estimates along with actual housing growth thus far in the monitoring period for each urban center, hub urban village, and residential urban village in the city.

Table 1.4

Seattle 2035 Comprehensive Plan Housing Growth Estimates for the 20-Year Planning Period and Actual Housing Growth from Beginning of 2016 to End of 2017	Number of Housing Units Existing at the End of 2015	20-Year Growth Estimates (Beginning of 2016 to End of 2035)		Growth in Housing Units Beginning of 2016 to End of 2017		Housing Units in the Pipeline at End of 2017
		Expected Growth in Housing Units (Beginning of 2016 to End of 2035)	**Expected % Growth in Housing Units Above 2015 Base**	**Number of Housing Units Added**	**% Growth in Housing Units Above 2015 Base**	**Number of Housing Units Permitted, Not Yet Built**
Seattle city as a whole:	336,188	70,000	N/A (The Plan does not show percentage growth estimates above base for urban centers.)	15,240	4.5%	21,434
Inside Urban Centers and Urban Villages:	148,066	58,500		13,091	8.8%	17,417
Urban Centers:	80,322	35,000		7,976	9.9%	10,659
Downtown	24,347	12,000		3,015	12.4%	3,075
First Hill/Capitol Hill	29,619	6,000		1,792	6.1%	2,605
Northgate	4,535	3,000		3	0.1%	361
South Lake Union	4,536	7,500		2,073	45.7%	3,068
University District	9,802	3,500		787	8.0%	989
Uptown	7,483	3,000		306	4.1%	561
Hub Urban Villages:	24,505	10,900	N/A	2,272	9.3%	2,544
With very good transit service:	13,048		60%	1,465	11.2%	1,397
Ballard*	9,168	4,000		1,064	11.6%	787
West Seattle Junction	3,880	2,300		401	10.3%	610
Without very good transit service:	5,746		40%	652	11.3%	358
Fremont	3,200	1,300		501	15.7%	137
Lake City	2,546	1,000		151	5.9%	221
With high displacement risk, regardless of the level of transit service:	5,711		40%	155	2.7%	789
Bitter Lake Village	3,257	1,300		4	0.1%	177
Mt. Baker (North Rainier)	2,454	1,000		151	6.2%	612

Table continued on next page.

Table 1.4 (continued)

Seattle 2035 Comprehensive Plan Housing Growth Estimates for the 20-Year Planning Period and Actual Housing Growth from Beginning of 2016 to End of 2017						
	Number of Housing Units Existing at the End of 2015	20-Year Growth Estimates		Growth in Housing Units Beginning of 2016 to End of 2017		Housing Units in the Pipeline at End of 2017
		Expected Growth in Housing Units (Beginning of 2016 to End of 2035)	Expected % Growth in Housing Units Above 2015 Base	Number of Housing Units Added	% Growth in Number of Housing Units	Expected Growth in Number of Housing Units
Residential Urban Villages:	**42,174**	**12,600**	**N/A**	**2,855**	**6.8%**	**4,215**
With very good* transit service:	**2,923**		**50%**	**495**	**16.9%**	**1,049**
Crown Hill	1,307	700		158	12.1%	86
Roosevelt	1,616	800		337	20.9%	963
Without very good transit service:	**21,845**		**30%**	**1,334**	**6.1%**	**1,349**
Admiral	1,131	300		142	12.6%	28
Aurora/Licton Springs	3,454	1,000		45	1.3%	380
Eastlake**	3,829	800		245	6.4%	253
Green Lake**	2,605	600		228	8.8%	100
Greenwood-Phinney Ridge	1,757	500		93	5.3%	140
Madison-Miller	2,781	800		507	18.2%	264
Morgan Junction	1,342	400		14	1.0%	37
Upper Queen Anne	1,724	500		-1	-0.1%	9
Wallingford	3,222	1,000		61	1.9%	138
With high displacement risk, regardless of the level of transit service:	**17,406**		**30%**	**1,026**	**5.9%**	**1,817**
23rd & Union-Jackson	5,451	1,600		450	8.3%	676
Columbia City	2,683	800		300	11.2%	448
North Beacon Hill	1,474	400		143	9.7%	129
Othello	2,836	900		91	3.2%	423
Rainier Beach	1,520	500		10	0.7%	67
South Park	1,292	400		13	1.0%	19
Westwood-Highland Park	2,150	600		19	0.9%	55
Manufacturing/Industrial Centers* **	**1,065**	**N/A**	**N/A**	**-12**	**-1.1%**	**-1**
Outside Centers and Villages	**188,122**	**11,500**	**N/A**	**2,149**	**1.1%**	**4,017**

Table continued on next page.

Table 1.4 (continued)

Seattle 2035 Comprehensive Plan Housing Growth Estimates for the 20-Year Planning Period and Actual Housing Growth from Beginning of 2016 to End of 2017
Sources: Seattle 2035 Comprehensive Plan 20-year housing growth estimates and City of Seattle Office of Planning & Community Development analysis of permit data in Seattle Department of Construction and Inspections Building Construction Permit Data Warehouse. Notes: Housing growth refers to net growth (i.e., new units minus demolished units). Housing growth in the pipeline refers to the net new units for which the building construction permit has been issued; issued permits may be in pre-construction, under construction, or complete awaiting final inspection. *Very good transit service means either a light rail station or a RapidRide bus service plus at least one other frequent bus route. The Growth Strategy identifies the growth estimates for the twenty-year planning period, listing housing growth estimates as numbers for urban centers and as percentages for urban villages. Numerical growth estimates for urban villages are shown in the Growth Strategy Appendix of the Plan. **Numerical housing growth estimates for the 20-year planning period for most urban villages are based on percentage growth above the number of housing units existing in 2015, with numbers rounded to the nearest hundred. Exceptions are where zoned development capacity as of 2015 constrains growth to a lower amount than reflected by percentage shown; this applies to the Ballard hub urban village, and the Eastlake and Green Lake residential urban villages. (More specifically, the 20-year growth estimates for these three urban villages are constrained to roughly 80 percent of zoned development capacity.) Estimated development capacity is shown in the Land Use Appendix. The Comprehensive Plan appendices, including the Growth Strategy Appendix and Land Use Appendix can be accessed here. ***The Plan does not assign housing growth estimates to Manufacturing /Industrial Centers as zoning strictly limits residential uses in these areas.

Access updated data on housing growth in Seattle's urban centers and villages:

OPCD produces tabular reports on "Urban Center / Village Housing Growth," which we update quarterly and post on our Population and Demographics website. (The City's transition to a new permitting system may temporarily postpone these updates.)

Yesler Terrace neighborhood redevelopment illustration by Stephanie Bowers
Architect: CollinsWoerman

Employment Growth

Employment growth is essential both for sustaining Seattle's contribution to the regional economy and increasing economic opportunity for local residents. Monitoring employment growth is fundamental to helping the community and City leaders see whether we are building a prosperous and equitable Seattle.

Focusing employment growth in urban centers and hub urban villages, as envisioned in the Growth Strategy, makes workplaces easier for residents to reach, enhances the ability of transit to serve commuters efficiently, and reduces greenhouse gas emissions. Locating employment in dense areas of the city also helps grow vibrant neighborhoods where area residents and employees can have convenient access to retail and public services.

Black Dot Underground
Co-working and startup incubator space
Photo courtesy of
Seattle Office of Economic Development

Key policy guidance

The Plan's Growth Strategy identifies the amount and distribution of employment growth the City is anticipating over the 20-year planning period. Table 1.5 (on the following page) lists the number of jobs the City is expecting in each of Seattle's urban centers and manufacturing/industrial centers, as well as the expected growth rate for jobs in each of the hub urban villages.

Policies in other elements play essential roles in supporting growth in employment and economic opportunity. The Land Use element guides zoning and development regulations to provide the space that businesses and jobs need to grow. The Economic Development element includes policies to help businesses foster vibrant commercial districts and maintain and enhance key industry clusters. Both the Economic Development element and the Community Well-Being element include goals and policies to help people develop skills needed to fill a dynamic mix of jobs.

Links to some of the relevant goals and policies in the Comprehensive Plan:

Growth Strategy

GS G1
GS 1.1
GS 1.2
GS 1.16
GS G2
GS 2.1
GS 2.2
GS 2.6

Land Use element

LU G1
LU 1.2
LU 1.3
LU G2
LU G9
LU G10
LU G11

Economic Development element

ED G1
ED G2
ED G3
ED 3.2
ED 3.4
ED 3.9
ED G4

Community Well-Being element

CW G4

ANTICIPATED EMPLOYMENT GROWTH

In the city as a whole— Between 2015 and 2035, Seattle's Comprehensive Plan is expecting the number of jobs in the city to grow by at least 115,000.

In urban centers—Seattle expects close to 60 percent of the city's employment growth to occur in urban centers, building on the role these areas already play as dense activity centers with access to the regional transit network. Downtown is anticipated to absorb more than half of the job growth in urban centers.

In manufacturing/industrial centers—Growth in employment is planned to continue within the city's two manufacturing/industrial centers (M/ICs). The Plan recognizes these sectors—and the land set aside for them—as key resources for maintaining and growing a diversified economy with living wage jobs for workers with a range of education levels.

Table 1.5

Seattle 2035 Comprehensive Plan Job Growth Estimates for the 20-Year Planning Period	
	Expected Growth in Number of Jobs
Seattle as a whole	**115,000**
Urban Centers:	**66,500**
Downtown	35,000
First Hill/Capitol Hill	3,000
Northgate	6,000
South Lake Union	15,000
University District	5,000
Uptown	2,500
Manufacturing/Industrial Centers (M/ICs):	**9,000**
Ballard/Interbay/Northend	3,000
Duwamish	6,000
	Expected Job Growth*
Hub Urban Villages	**50%**

Notes: The Comprehensive Plan does not assign 20-year employment growth estimates to residential urban villages and areas outside centers and villages.

*Percentage growth above the actual number of jobs in 2015, except in individual hub urban villages where estimated development capacity based on 2015 zoning constrains job growth to less than 50 percent. See Table 1.8 for more details.

In hub urban villages—Substantial job growth is also planned for the city's six hub urban villages. The Plan generally expects employment in each hub urban village to grow by 50 percent relative to the number of jobs present in 2015. The Plan's 20-year employment growth estimates for two hub urban villages—Ballard and Fremont—are constrained to less than 50 percent due to estimated development capacity.

Indicator: Employment growth in the city as a whole

We use annual employment estimates from the Puget Sound Regional Council (PSRC) to monitor actual employment growth relative to that anticipated in Seattle's Plan. (See next box to the right.)

PSRC's employment estimates refer to March of each year, with the 2016 estimates being the most recently available. For purposes of tracking employment growth, we use March 2015 as our base.

Note about employment data sets: The City uses different employment data sets for different purposes:

- **The 20-year growth estimates in the City's current Comprehensive Plan refer to *total employment excluding jobs in the construction and resources sectors*.** These sectors are excluded because workplace location for these jobs are difficult to track.
- **To look at employment by sector, we use *covered employment* estimates, which refer to jobs covered by state unemployment insurance.** These jobs exclude self-employment, proprietors, corporate officers, and some other types of positions. PSRC indicates that covered jobs have generally comprised roughly 90 percent of all jobs. **In the past, the City also used estimates of covered employment to track job growth relative to planning estimates.**

Both of these employment data sets are maintained by PSRC and can be found on PSRC's website. Additional documentation is here.

What the data show

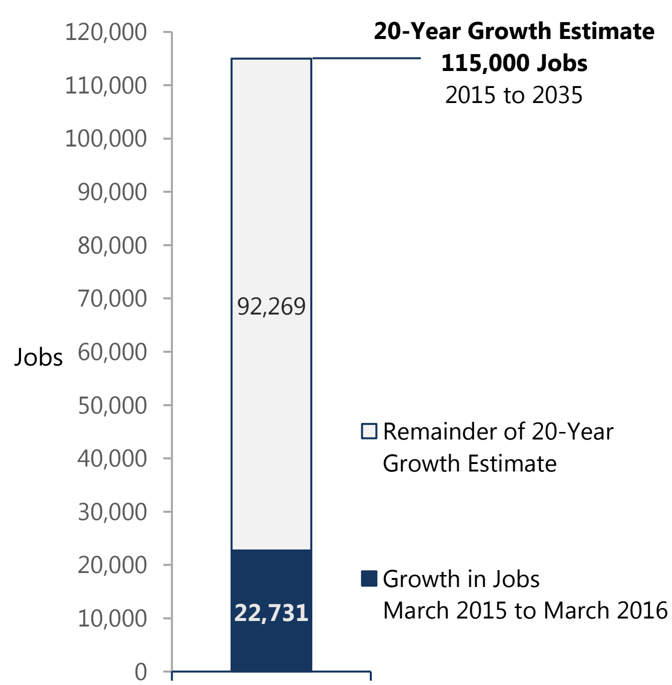
The number of jobs in Seattle is well over half a million and has been growing quickly in recent years.

- **As of March 2015, there were approximately 567,000 jobs located in Seattle,** not including jobs in the construction and resource sectors
- **As shown in Figure 1.10, the number of jobs in Seattle increased by nearly 23,000 (or 4 percent) between 2015 and 2016, reflecting the economic boom our city is experiencing.**

  In one year, the city tallied an increase in jobs roughly equal to one-fifth of the growth anticipated for the entire 20-year planning period.
- **By March 2016, Seattle had 590,000 jobs** excluding employment in construction and resources.

Figure 1.10

Employment Growth in Seattle
During the Comprehensive Plan Monitoring Period



Sources: Seattle 2035 Comprehensive Plan employment growth estimates and Puget Sound Regional Council (PSRC) employment estimates.

Notes: Based on March employment excluding jobs in the construction and resources sectors.

Access updated data on employment growth in Seattle:

We invite readers to view the employment growth reports for the city and its centers and villages on OPCD's Population and Demographics website. We update those reports on an annual basis once we receive March employment figures from PSRC.

A look at the distribution of employment in Seattle by sector

The best source for looking at local employment by sector is PSRC's covered employment data set. Covered jobs are those covered by state unemployment insurance. (For details, see the "note about employment data sets" on the previous page.)

Flowers Just 4-U
Photo courtesy of
Seattle Office of Economic Development

Table 1.6 shows estimates by sector for covered jobs located in Seattle.

- **As of March 2016, covered employment in Seattle totaled about 558,000 jobs.** This represents growth of close to 23,000 jobs, or 4 percent, compared to just one year prior.
- **Somewhat over half (53 percent) of the covered jobs in Seattle are in the Services Sector** as shown in Table 1.6. Based on covered employment, the largest industries within the Services sector are Health Care and Social Assistance; Professional, Scientific, and Technical Services; and Accommodation and Food Services—each of which accounts for between 55,000 and 75,000 covered jobs in the city.
- **After Services, Retail is the next largest broad industry sector in Seattle**, with more than 60,000 covered jobs.
- **Of the largest industry sectors in Seattle, the fastest growing between 2015 and 2016 were Construction and Resources; Retail; Information; and Professional, Scientific, and Technical Services.**
    - Covered employment in each of these sectors grew at a rate at least one and a half times that of overall covered employment, with the Information sector growing the fastest—at nearly three times the rate of overall growth.

Table 1.6

Estimates of Covered Jobs in Seattle
Broad Industry Sectors and Detail for Services Sector
March 2016

	Number of Covered Jobs
Total:	**558,023**
Construction and Resources	**23,302**
Finance / Insurance / Real Estate (FIRE)	**32,625**
Manufacturing	**26,239**
Retail	**60,659**
Services:	**298,025**
Information	28,462
Professional, Scientific, and Technical Services	64,041
Management of Companies and Enterprises	17,564
Admin. & Support and Waste Mgmt. & Remediation	13,954
Educational Services	11,684
Health Care and Social Assistance	75,442
Arts, Entertainment, and Recreation	10,943
Accommodation and Food Services	54,568
Other Services (except Public Administration)	21,368
Wholesale Trade / Transportation / Utilities (WTU)	**30,574**
Government	**47,555**
Public Sector Education	**39,043**

Source: PSRC Covered Employment Estimates, which are based on Quarterly Census of Employment and Wages reported by employers to the Washington State Employment Security Department.

Notes: Covered employment refers to jobs covered by the Washington State Unemployment Insurance program. Estimates for covered jobs are by workplace location and incorporate supplemental research and analysis by PSRC.

Access updated data on employment growth by sector:

Readers can find updates on Citywide covered employment by sector on OPCD's Population and Demographics website. We update those reports on an annual basis as soon as we receive March employment figures from PSRC.

Perspective on how employment growth in Seattle has varied over time

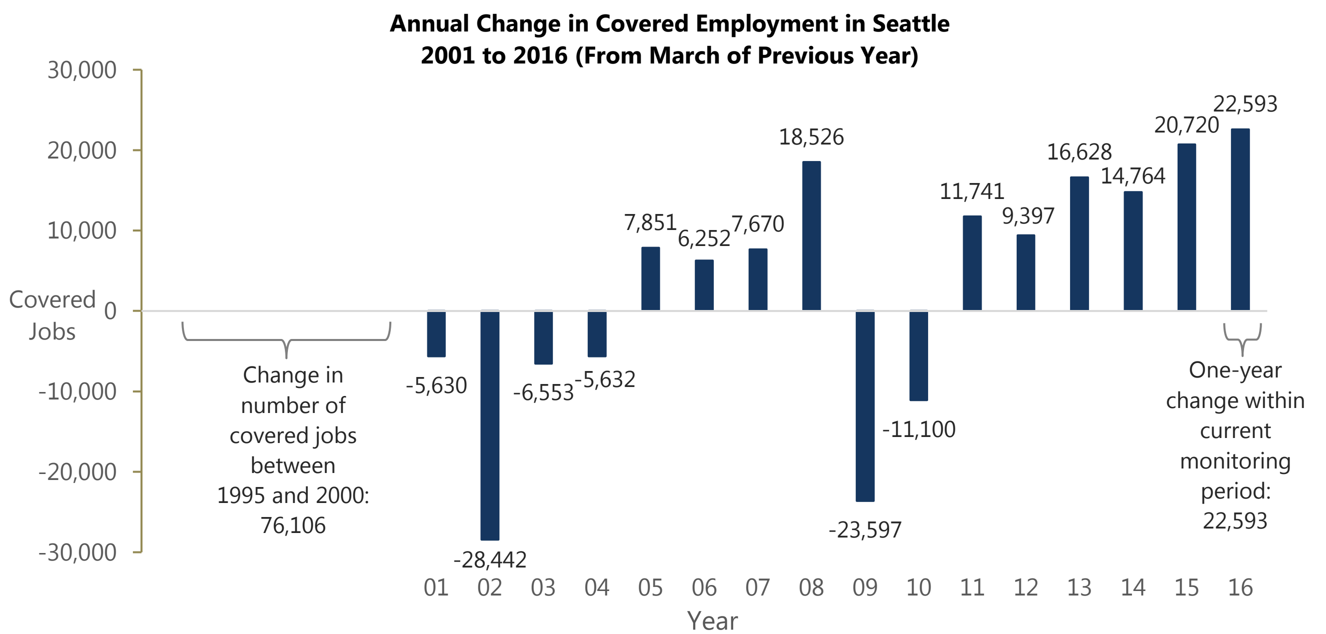
As we review employment data for the first year of the current Comprehensive Plan monitoring period, we need to keep in mind that employment growth is subject to economic cycles and can vary greatly over time. (Prior to the current planning period, the City used the covered employment dataset to track changes is employment relative to growth expectations.)

Year-to-year variation is illustrated in the chart in Figure 1.11. This chart shows annual change in the number of covered jobs in Seattle from 2001 to 2016. The blows to employment from the two recessions that began in 2001 (when the dot-com bubble burst) and in 2008 (when the Great Recesson began) are clear, as are the periods of recovery.

The first year of the current Comprehensive Plan monitoring period is the *sixth straight year* that Seattle has experienced job growth within the current economic expansion.

The increase in covered employment from March 2015 to March 2016 is the largest one-year increase in Seattle that PSRC has recorded since it began tracking annual changes in employment.

Figure 1.11



Sources: PSRC Covered Employment Estimates.

Notes: These are job covered by the Washington State Unemployment Insurance program.

Indicator: Share of the city's employment growth in centers and hub urban villages

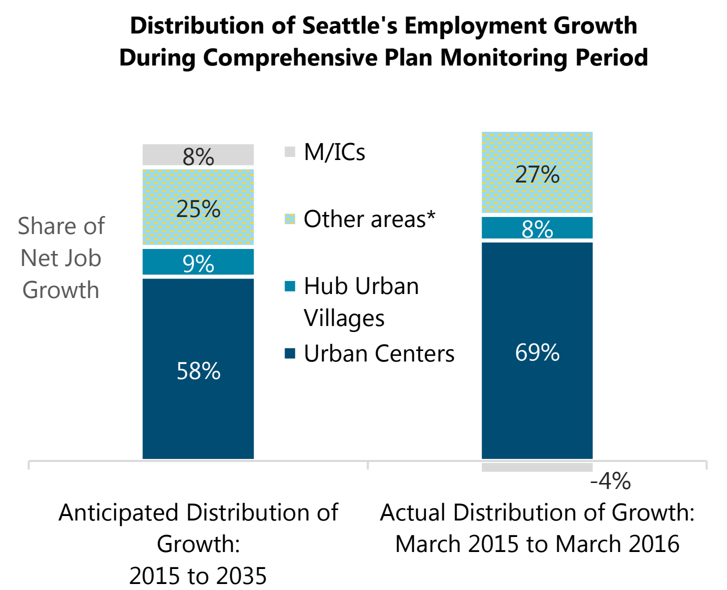
What the data show

Figure 1.12 and Table 1.7 show the distribution of 20-year job growth anticipated in the Plan compared to the job growth that has occurred so far in the monitoring period.

Job growth in the first year of the 20-year monitoring period was strongly concentrated in urban centers.

- **Between 2015 and 2016, 69 percent of net job growth in Seattle happened in urban centers, surpassing the 58 percent share anticipated.**
- **Counter to expectations, and in contrast to robust growth elsewhere in the city, the number of jobs in manufacturing/industrial centers (M/ICs) declined.** It will be important to monitor M/IC employment closely in coming years.
- **The share of net job growth that occurred in hub urban villages was similar to that anticipated.**

Figure 1.12



Sources: Comprehensive Plan growth estimates for 2015 to 2035; PSRC employment estimates.

*"Other areas" are areas outside centers and hub urban villages.

For detailed notes see Table 1.7 table below.

Table 1.7

Employment Growth in Seattle and Its Urban Centers During Comprehensive Plan Monitoring Period

	Comprehensive Plan 20-Year Employment Growth Estimates 2015-2035		Actual Growth in Jobs March 2015 to March 2016	
	Anticipated Growth in Number of Jobs	**Share of Growth Anticipated in These Areas**	**Growth in Number of Jobs**	**Share of Growth That Occurred in These Areas**
Seattle as a whole:	**115,000**	**100%**	**22,731**	**100%**
Inside Centers and Hub Urban Villages:	**86,300**	**75%**	**16,650**	**73%**
Urban Centers	66,500	58%	15,731	69%
Manufacturing/Industrial Centers	9,000	8%	-904	-4%
Hub Urban Villages	10,800	9%	1,823	8%
Other areas:	**28,700**	**25%**	**6,081**	**27%**
Residential Urban Villages	N/A	N/A	1,461	6%
Outside of Centers and Villages	N/A	N/A	4,620	20%

Sources: Seattle 2035 Comprehensive Plan employment 20-year growth estimates and PSRC employment estimates

Notes: The 20-year growth estimates in Seattle's Comprehensive Plan and the PSRC estimates shown in this table are for all jobs minus jobs in the construction and resources sectors. Seattle's Comprehensive Plan does not assign 20-year growth estimates to areas outside centers and hub urban villages.

A look back at the distribution of employment growth in previous planning periods

Looking back at employment growth during previous planning periods provides historical context and reminds us that several economic cycles, sometimes dramatic ones, can punctuate a 20-year planning period.

In previous planning periods the City used covered employment estimates to track employment growth. As previously noted, "covered employment" refers to jobs covered by the state's unemployment insurance program.

The 1994 Plan anticipated that Seattle would add about 131,000 to 147,000 jobs during the twenty-year planning period.

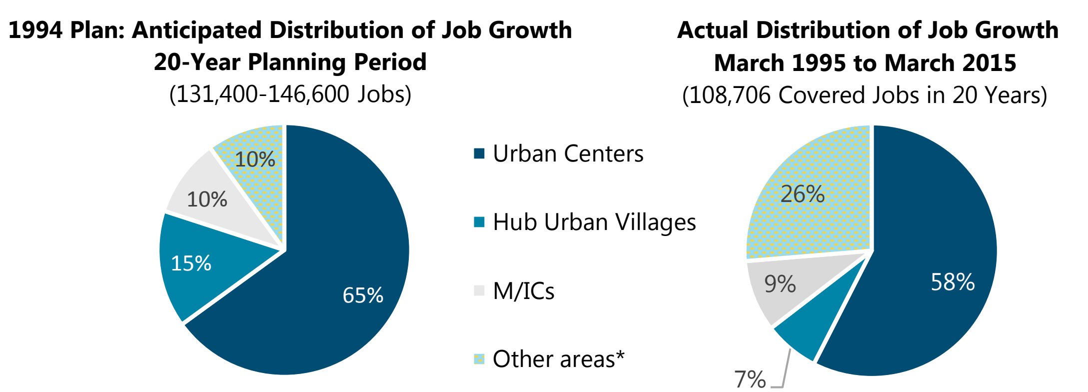
Employment fluctuated markedly between 1995 and 2004, reflecting broader regional and national economic trends. The number of covered jobs in Seattle reached 502,000 during the 1990s dot-com boom, then fell with the bust that followed in 2001. Employment began to rise again mid-decade with covered jobs exceeding 500,000 again in 2008 before the housing bubble burst and the Great Recession took hold. By 2010, Seattle once again began adding jobs at a rapid pace.

As of March 2015, the number of covered jobs in the city was estimated at nearly 535,500, reflecting an increase of about 109,000 during the twenty years after the Plan was first adopted.

- **The share of job growth that happened in urban centers was somewhat lower than the share anticipated in the 1994 Plan**: well over half (58 percent) of the jobs were added in urban centers, but a 65 percent share had been envisioned in the 1994 Plan.
- **The proportions of employment growth that occurred in the city's hub urban villages was less than half of what was anticipated by the plan**, and the share of employment growth that went to manufacturing/industrial centers was slightly lower than had been anticipated.

Figure 1.13

Distribution of Employment Growth in Seattle During 1994 Comprehensive Plan Planning Period



Source: PSRC covered employment estimates.

Note: Covered jobs are typically about 90 percent of total employment in an area.

*"Other areas" are areas outside centers and hub urban villages.

With the 2004 Plan update, the City was asked to accommodate less growth because of the lower forecasts provided by the Washington State Office of Financial Management. At the same time, that update increased the shares of growth anticipated to go to urban centers and to manufacturing/industrial centers. Due largely to the period of dramatic growth the local economy entered in 2013, covered employment over the planning period increased faster than anticipated in the 2004 Plan. However, the relative shares of job growth going to centers was significantly less than the 2004 Plan anticipated.

Indicators: Employment growth in urban centers and manufacturing/ industrial centers

What the data show

Figure 1.14 shows net change between March 2015 and March 2016 in employment in individual urban centers and manufacturing/industrial centers and the remainder of 20-year growth anticipated. (The statistics cited here are for all jobs minus jobs in the construction and resources sectors.)

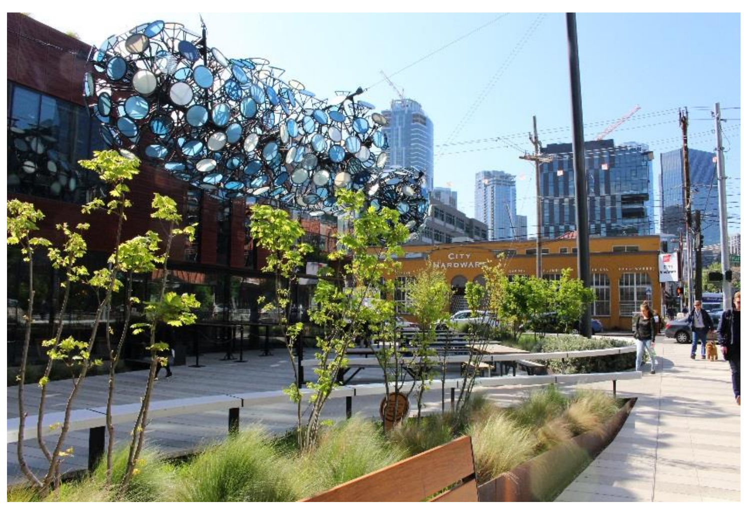
IN URBAN CENTERS

Overall growth within Seattle's urban centers occurred at a rapid pace during the first year of the monitoring period.

- **From 2015 to 2016, the aggregate number of jobs in Seattle's six urban centers increased by 5 percent, which is slightly higher than the 4 percent rate in the city as a whole.**
- **The number of jobs added in urban centers was nearly 16,000, which is roughly 24 percent of their combined twenty-year growth estimate of 66,500.**

Jobs were added in some urban centers far faster than in others.

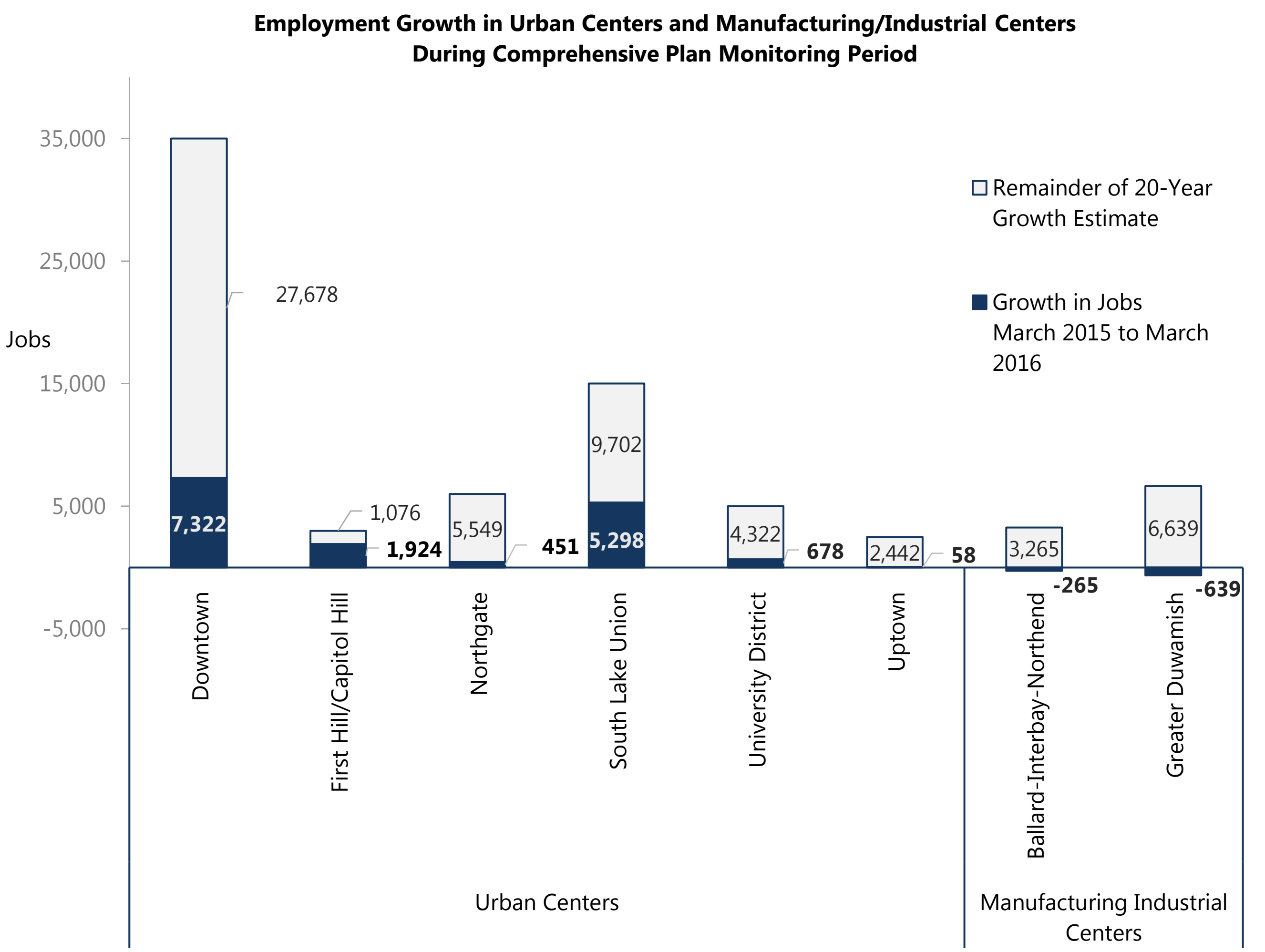
- Between 2015 and 2016, job growth in **Downtown** totaled 21 percent of expected 20-year growth, while **First/Hill Capitol Hill** and **South Lake Union** job growth equaled 64 percent and 35 percent, respectively, of their 20-year anticipated growth.
- For context, if the Plan's 20-year employment growth estimates were distributed evenly over 20 years, jobs in each center would have grown in one year by 5 percent of the 20-year estimate. The only center that moved more slowly than this toward its 20-year growth estimate was **Uptown**.
- While **Downtown** added the greatest *number* of jobs, employment in **South Lake Union** grew most quickly.
  - Between 2015 and 2016, employment in **Downtown** grew by roughly 7,300 jobs—for a rate just shy of the 5 percent growth that occurred in urban centers overall.
  - Employment in **South Lake Union** increased by 5,300 jobs—which equates to extraordinarily rapid growth of 14 percent in just one year.



IN MANUFACTURING/INDUSTRIAL URBAN CENTERS

The number of jobs declined in the city's two M/ICs. During the first year of the monitoring period the **Greater Duwamish M/IC**, which is the larger of the two M/ICs, shed about 600 jobs, while the **Ballard-Interbay-Northend M/IC** lost roughly 300 jobs. Given the importance of manufacturing and industrial jobs to the diversity of Seattle's economy, more detailed monitoring may be needed to track trends in the number and mix of jobs in the M/ICs.

Figure 1.14



Sources: Seattle 2035 Comprehensive Plan 20-year employment growth estimates and PSRC employment estimates.

Notes: Growth estimates refer to total employment excluding jobs in the construction and resources sectors.

Indicator: Employment growth in hub urban villages

What the data show

The first year of the monitoring period saw varied rates—and varied amounts—of growth among Seattle's six hub urban villages. Between March 2015 and March 2016:

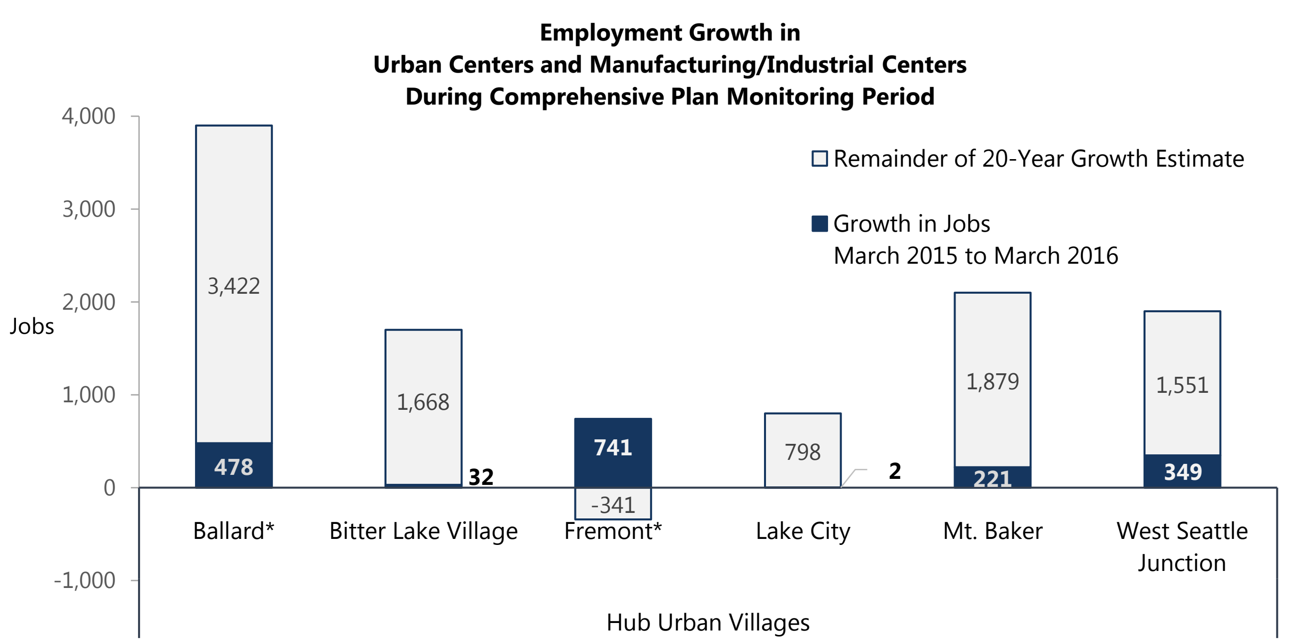
- **Employment in four hub urban villages—West Seattle Junction, Fremont, Ballard, and Mt. Baker—grew more rapidly than employment grew in the city as a whole.**
  - The hub urban villages with the highest growth rates were **West Seattle Junction** and **Fremont,** where employment grew by 9 percent and 8 percent respectively.
- **Fremont gained the largest number of jobs while Ballard added the second largest number.**

  Fremont and **Ballard** are, coincidentally, the two hub urban villages growth where the Plan's 20-year growth expectations are constrained by estimated development capacity. (More specifically, the growth estimate for these villages are constrained to roughly 80 percent of estimated development capacity for jobs based on 2015 zoning. The [Comprehensive Plan Land Use Appendix] shows development capacity estimates for centers and villages as modeled by the City based on 2015 zoning.) In **Fremont's** case, the Plan's 20-year growth estimate is for just 400 more jobs, but the neighborhood added almost twice as many jobs as that in the first year of the monitoring period. The City's development capacity model aims to estimate development that could be added under normal circumstances rather than the maximum amount of development that could possibly be built. The number of jobs added can exceed modeled development capacity in an extraordinarily strong market.
- In contrast, the numbers of jobs in **Bitter Lake Village** and in **Lake City** stayed nearly the same.

Figure 1.15, below, shows employment growth between March 2015 and March 2016 and the remainder of 20-year growth anticipated for each hub urban village.

Table 1.8, on the next page, shows the 20-year Comprehensive Plan employment growth estimates along with actual employment growth during the first year of the monitoring period for each urban center, manufacturing/industrial center, and hub urban village in the city.

Figure 1.15



Sources: Seattle 2035 Comprehensive Plan employment 20-year growth estimates and PSRC employment estimates.

Notes: Employment growth estimates are for all jobs minus jobs in the construction and resources sectors.

*The 20-year job growth estimates for the Fremont and Ballard hub urban villages are constrained to roughly 80 percent of zoned development capacity.

Table 1.8

Seattle 2035 Comprehensive Plan Employment Growth Estimates for the 20-Year Planning Period and Actual Employment Growth from March 2015 to March 2016					
	Number of Jobs March 2015	**20-Year Employment Growth Estimates** (Expected Growth in Jobs March 2015 to March 2035)	**Actual Growth in Jobs March 2015 to March 2016**		**Number of Jobs March 2016**
			Growth in Number of Jobs	**Percent Growth in Jobs Above 2015 Base**	
Seattle as a whole:	**567,393**	**115,000**	**22,731**	**4.0%**	**590,124**
Inside Centers and Hub Villages:	**428,196**	**86,300**	**16,650**	**3.9%**	**444,846**
Urban Centers:	**322,568**	**66,500**	**15,731**	**4.9%**	**338,299**
Downtown	164,253	35,000	7,322	4.5%	171,575
First Hill/Capitol Hill	43,629	3,000	1,924	4.4%	45,553
Northgate	12,876	6,000	451	3.5%	13,327
South Lake Union	38,762	15,000	5,298	13.7%	44,060
University District	47,565	5,000	678	1.4%	48,243
Uptown	15,483	2,500	58	0.4%	15,541
Manufacturing Industrial Centers:	**75,638**	**9,000**	**-904**	**-1.2%**	**74,734**
Ballard-Interbay-Northend	17,051	3,000	-265	-1.6%	16,786
Greater Duwamish	58,587	6,000	-639	-1.1%	57,948
Hub Urban Villages:	**29,990**	**10,800**	**1,823**	**6.1%**	**31,813**
Ballard*	8,259	3,900	478	5.8%	8,737
Bitter Lake Village	3,338	50% above 2015 base ~1,700	32	1.0%	3,370
Fremont*	8,808	400	741	8.4%	9,549
Lake City	1,675	50% above 2015 base ~800	2	0.1%	1,677
Mt. Baker (North Rainier)	4,130	50% above 2015 base ~2,100	221	5.4%	4,351
West Seattle Junction	3,780	50% above 2015 base ~1,900	349	9.2%	4,129
Residential Urban Villages**	**38,948**	**N/A**	**1,461**	**3.8%**	**40,409**
Outside Centers and Villages**	**100,249**	**N/A**	**4,620**	**4.6%**	**104,869**

Sources: Seattle 2035 Comprehensive Plan 20-year employment growth estimates and PSRC employment estimates

Notes: The 20-year growth estimates in Seattle's Comprehensive Plan and the PSRC estimates shown in this table are for all jobs minus jobs in the construction and resources sectors. For annually updated data see the Urban Center/Village Employment Growth reports on the Office of Planning and Community Development's website.

*Twenty-year employment growth estimates for hub urban villages are equal to 50 percent of these areas' 2015 employment except for in Ballard and Fremont where the growth estimates are constrained to roughly 80 percent of 2015 zoned development capacity. Details on the 20-year growth estimates can be found in the Comprehensive Plan Growth Strategy Appendix and information on development capacity is in the Land Use Appendix. The Comprehensive Plan appendices are here.

**The Comprehensive Plan does not assign 20-year employment growth estimates outside centers and hub urban villages.

Section 2: Affordability

Broad context

Comprehensive Plan policies aim to achieve a supply of housing that is both affordable to a spectrum of incomes and suitable for a variety of household types and sizes—including in urban centers and villages. As stated in the Plan's Growth Strategy, "because the City expects to concentrate public facilities, services, and transit in urban centers and urban villages, it must ensure that there are opportunities for all households to find housing and employment in those places, regardless of income level, family size, or race."

And yet, as discussion in the Plan acknowledges, Seattle's high housing costs are making it increasingly difficult for low-income households to live in our city.

The Plan's Housing Appendix found that meeting affordable housing needs associated with the 20-year growth estimate of 70,000 net new housing units would require an increase of roughly 27,500 to 36,500 units affordable at or below 80% of area median income (AMI). (The 27,500-36,500 estimate did not account for *existing* unmet affordable housing needs including those of the homeless.) That analysis found especially large shortages of affordable units at 30% of AMI and 50% of AMI, as well as smaller, but still substantial, shortages at 80% of AMI.

As we write this, Seattle is in a housing affordability crisis. Although recent years saw record levels of housing development, that development was outpaced by the growing demand for housing associated with the booming economy. Rapidly rising rents were one result. For example, from 2012 to 2017, the average market rent for a 1-bedroom apartment increased by 37 percent after adjusting for inflation. (See Figure 2.1).

Figure 2.1

Average rents for apartments in Seattle
(inflation-adjusted to 2017 dollars)

1-bedroom: up 37% in 5 years
$1,282 in 2012
$1,755 in 2017

2-bedroom, 2-bath: up 33% in 5 years
$1,951 in 2012
$2,605 in 2017

Source: Dupre + Scott Apartment Advisors, Inc. fall rent surveys.
Note: Rents for occupied (non-income-restricted) units in complexes with 20 or more units.

Market analysts recently started seeing signs that rent increases have slowed or that rents may have even declined slightly. However, the rapid rent increases that accumulated over more than five years have had profound effects and have been especially tough on lower-income renters. Of additional concern, historically sparse inventories of homes for sale sent sales prices soaring in recent years, which has placed homeownership further out of reach for many households.

Monitoring the affordability of our housing supply is key to gauging the impact of the City's policies and programs and understanding whether the City may need to recalibrate these policies and programs. Comprehensive Plan Policy H 5.4 states:

> "Monitor regularly the supply, diversity, and affordability of housing for households by income level, and use this information to help evaluate whether changes to housing strategies and policies are needed to encourage more affordable housing or to advance racial and social equity."

The topics and indicators we're monitoring

AFFORDABILITY OF MARKET-RATE RENTAL HOUSING

Here we're examining the rents (including the cost of basic utilities) that households pay for market-rate rental units. To assess affordability of market-rate housing, we look at the average, median (50th percentile), and 25th percentile rents for these units and identify the income levels households would need to afford these rents.

INCOME-RESTRICTED AFFORDABLE HOUSING

Here we're tracking the supply of income-restricted affordable housing units. These are housing units dedicated to households who are eligible based on their income. Housing costs in these units are capped to limit the amount that these low-income (or in some programs, moderate-income) households pay.

NOTES ON HOUSEHOLD INCOME CATEGORIES AND HOUSING COST BURDENS

The income categories we use in this report are based on calculations of area median income (AMI) published by the U.S. Department of Housing and Urban Development (HUD).

HUD regards housing costs as affordable if they consume no more than 30 percent of a household's income; households are considered cost-burdened if they spend more than this. Households who spend *more than half* of their income on housing costs are *severely cost-burdened*.

HUD obtains special "CHAS" tabulations of American Community Survey (ACS) data from the U.S. Census Bureau to help local communities understand and address housing needs. The most recent CHAS tabulations, which are from the 2000-2014 five-year ACS, indicate that:

- **More than half of Seattle's renter households, and roughly 20 percent of owner households, have low incomes** (that is, incomes no higher than 80% of AMI). **About four in ten renter households have very low incomes, and a quarter of renter households have extremely low incomes.**
- **About 70 percent of low-income renter households in Seattle are cost-burdened.** Drilling down further into the data reveals that:
    - **More than a third of low-income renter households in Seattle are *severely* cost burdened.**
    - **Well over half of extremely low-income renter households in our city are *severely* cost burdened.**

Table 2.1 shows the upper limits of AMI-based income categories in 2017.

Table 2.1

2017 Limits for AMI-Based Household Income Categories				
	Household Size			
Percentage of Area Median Income (AMI*):	**1 Person**	**2 Persons**	**3 Persons**	**4 Persons**
30% of AMI (Extremely Low Income)	$20,200	$23,050	$25,950	$28,800
50% of AMI (Very Low Income)	$33,600	$38,400	$43,200	$48,000
60% of AMI	$40,320	$46,080	$51,840	$57,600
80% of AMI (Low Income)	$53,760	$61,440	$69,120	$76,800

Source: U.S. Department of Housing and Urban Development (HUD).

Notes: Incomes in this table are based on the HUD-adjusted area median family income (HAMFI) of $96,000 for 2017, as calculated and adjusted by household size, for the Seattle-Bellevue HUD Metro Fair Market Rent Area (i.e., King and Snohomish counties). Incomes shown here do not reflect additional adjustments, such as the caps and floors, that HUD applies under certain circumstances when calculating area income limits for housing program eligibility.

(The HUD-adjusted area median family income and associated income limits can depart from actual income patterns in communities. For example, HUD assigns to a family of four the median family income it estimates for an area regardless of the typical family size that exists in an area. HUD then adjusts income up or down according to household size. For further explanation, see the HUD 2017 Income Limit Briefing Materials.)

***For brevity, we use the term "area median income" or "AMI" to refer to the HUD-adjusted area median family income (HAMFI).**

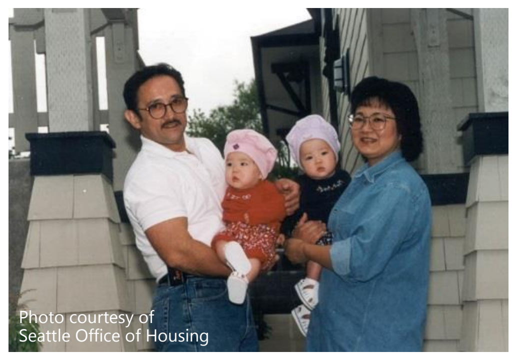


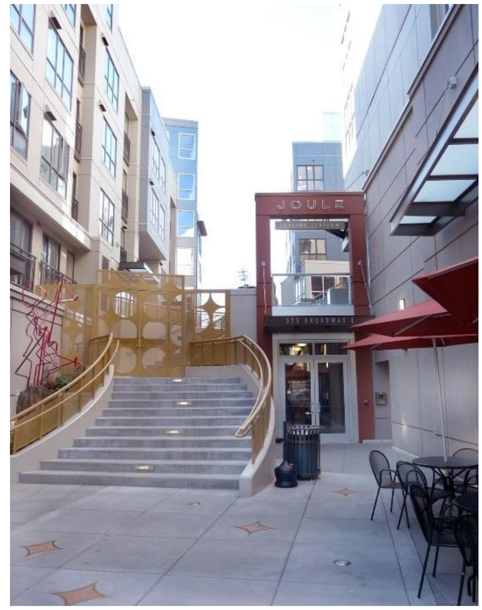
Photo courtesy of
Seattle Office of Housing

Affordability of Market-Rate Rental Housing

The amounts charged for housing affect who can live where and what opportunities people can access. The amount households pay for housing also affects their ability to afford other necessities.

The housing prices and rents charged in an area can also influence the ability of businesses to attract and retain workers. Trends in rents can impact the stability of households, the ability of people to remain housed, and the longevity of neighborhood cultural communities.

Monitoring the affordability of market-rate rental housing is essential for gauging the extent to which that housing is meshing with households' needs. Monitoring also helps indicate whether policies may need to be altered to better promote more affordable market-rate housing and whether subsidy and incentive programs may need to be adjusted to better address market gaps.



Key policy guidance

The Comprehensive Plan's Growth Strategy and the Plan's Land Use and Housing elements encourage housing for a broad range of households and incomes and promote shared responsibility between the public sector and private market for addressing affordable housing needs.

Affordability is a key concern addressed in Housing element Goal 2, which aims to: "Help meet current and projected regional housing needs of all economic and demographic groups by increasing Seattle's housing supply," and in Growth Strategy Policy 1.13, which states, "Provide opportunities for marginalized populations to live and work in urban centers and urban villages throughout the city by allowing a variety of housing types and affordable rent levels in these places." Similarly aimed goals and policies in the Land Use element relate to providing zoning and regulations that allow diverse housing types to accommodate housing choices that households and families with a range of incomes can afford.

Guided by the Plan, the City's housing strategies include a variety of approaches to boost construction and preservation of market-rate affordable housing. The goals and policies that support the City's Growth Strategy direct residential growth to Seattle's urban centers and villages and to areas near transit stations. When considering changes to zoning rules and housing development standards, the City looks to include measures that can increase housing choices for low-income households, primarily within growth areas.

The citywide Mandatory Housing Affordability legislation currently being considered by the City Council, would expand 10 urban villages and change zoning allowances to provide more land where additional housing could be built near frequent transit. The legislation would also require developers in these areas to contribute to increasing the city's supply of income-restricted affordable housing.

Links to some of the relevant goals and policies in the Comprehensive Plan:

Growth Strategy

GS 1.13

Land Use element

LU G2
LU 7.5
LU 7.12
LU 8.9
LU 15.3

Housing element

H G2
H G3
H G5
H 5.4
H 5.13
H 5.15
H 5.20
H 5.25

Indicators: Average, median, and 25th percentile rents in market-rate rental units and associated affordability levels

We're tracking average, median (50th percentile), and 25th percentile rents that households in Seattle pay for market-rate rentals.

- **Average rents** offer a general sense of the market's affordability, while median and 25th percentile rents provide insight into the distribution of rents.
- **Median rent** is the point on the rent spectrum where half of units rent for less money and half rent for more.
- **Rents at the 25th percentile** identify the point where 25 percent of units rent for less and 75 percent rent for more; this metric provides insights into the lower-cost portion of the market.

The data we report for these statistics are from the City's 2016 Unsubsidized Housing Monitoring Report, which is based on rent surveys conducted by Dupre + Scott Apartment Advisors, Inc. **We report on rents in terms of "gross rent" (rent plus the cost of basic utilities), and regard gross rent as affordable if it consumes no more than 30 percent of household income.** This is consistent with the standards that the U.S. Department of Housing and Urban Development uses to evaluate affordability.

To gauge affordability levels, we identify the minimum household income level, as a percentage of AMI, that a household would need to afford these gross rents. Table 2.2 shows the maximum gross rents we considered affordable by unit size and corresponding household sizes at various AMI levels for 2016.

Table 2.2

2016 HUD AMI-based Income Levels* and Corresponding Maximum Affordable Gross Rent

	50% of AMI (Very Low-Income Limit)		80% of AMI (Low-Income Limit)		120% of AMI	
	Annual Income	**Max. Affordable Monthly Gross Rent**	**Annual Income**	**Max. Affordable Monthly Gross Rent**	**Annual Income**	**Max. Affordable Monthly Gross Rent**
1 Person / Studio	$31,650	$791	$50,640	$1,266	$75,960	$1,899
1.5 People / 1 Bedroom	$33,900	$847	$54,240	$1,356	$81,360	$2,034
3 People / 2 Bedroom	$40,650	$1,016	$65,040	$1,626	$97,560	$2,439
4.5 People / 3 Bedroom	$46,975	$1,174	$75,160	$1,879	$112,740	$2,818

Sources: U.S. Department of Housing and Urban Development (HUD).

Notes: Based on the HUD-adjusted area median family income (HAMFI) of $90,300 for 2016, as calculated and adjusted by household size, for the Seattle-Bellevue HUD Metro Fair Market Rent Area, i.e., King and Snohomish counties. Income limits and corresponding rents shown here do not include the additional adjustments, such as caps and floors, that HUD applies under certain circumstances to calculate area income limits for housing program eligibility. For documentation see the HUD 2016 Income Limit Briefing Materials.

Analysis assumes household sizes of 1.0 person for studios and 1.5 persons per bedroom for units containing one bedroom or more; ratios are based on those HUD assumes for similar analyses. (See "CHAS Affordability Analysis," HUD working paper by Paul Joice, 2013.)

***For brevity, HUD-adjusted area median family income (HAMFI) is referred to as area median income (AMI).**

What the data show

IN THE CITY AS A WHOLE

UNITS IN MEDIUM TO LARGE APARTMENT COMPLEXES

Table 2.3 shows rent levels in 2016 for market-rate apartment units in complexes with 20 or more units.

Market-rate apartment units in medium-to-large complexes, the most common form of rental units in Seattle, are largely unaffordable to low-income households. As of 2016:

- Average and median gross rents for 1-bedroom units (the most common unit size in multifamily rentals) are unaffordable with a household income below 103% of AMI.
- Twenty-fifth percentile rents for 1-bedroom or larger units are unaffordable to households with incomes of 80% of AMI.

Table 2.3

Gross Rents and AMI-based Income Levels Needed to Afford these Rents
Market-Rate Rental Units in Medium to Large Apartment Complexes
(20 or more units per complex)
Seattle, 2016

	Studio	1 BR	2 BR	3 BR
Average rent	$1,407	$1,752	$2,314	$2,804
	89% of AMI	103% of AMI	114% of AMI	119% of AMI
Median rent	$1,394	$1,745	$2,178	$2,676
	88% of AMI	103% of AMI	107% of AMI	114% of AMI
25th percentile rent	$1,170	$1,411	$1,792	$2,211
	74% of AMI	83% of AMI	88% of AMI	94% of AMI

Sources: "2016 Monitoring Report: Affordability of Unsubsidized Rental Housing in Seattle," prepared by the City of Seattle's Office of Housing and Office of Planning & Community Development. Data from Dupre + Scott Apartment Advisors, Inc.

Notes: Based on Dupre + Scott fall 2016 surveys of unsubsidized rental properties. Statistics are for gross rents in occupied rental units, which include rents plus estimated costs for tenant-paid utilities. Income levels are based on 2016 AMI calculated and adjusted for household size by HUD. See Table 2.2 for additional notes and household sizes assumed for units with different numbers of bedrooms.

Market-rate rents vary depending on unit size, with studios and 1-bedroom units being more affordable and multi-bedroom units being less affordable (even with the adjustments made in the analysis to factor in household sizes):

- Within medium to large complexes, incomes of roughly 90-100% of AMI are generally required to afford rents for studios and one-bedroom units, and incomes of about 105-120% are typically needed to afford rents for multi-bedroom units.
- Within medium to large complexes, studios are the only size of unit with 25th percentile rents affordable for households with incomes of 80% of AMI.

UNITS IN SMALLER RENTAL PROPERTIES

Market-rate rents vary by property size, with better affordability in small apartment complexes and multiplexes than in larger complexes, and the least affordability in single-family rentals.

Units in smaller properties, are however, decreasing as a share of rental housing in the city.

As of 2016:

- In apartment complexes of 5-19 units, average and median rents for studios and 1-bedrooms are affordable with an income of 80% of AMI; and in small multiplexes (such as duplexes), affordability at 80% of AMI extends to 2-bedroom units. However, the large majority of units in small apartment complexes and multiplexes have rents that are unaffordable with an income of 60% of AMI.
- A household of more than 100% of AMI is needed to afford the median rent in single-family multi-bedroom homes, with *more than 120% of AMI* required to afford median rents in single-family homes with 3 or more bedrooms.

Table 2.4

Gross Rents and Affordability Levels by Unit Size Market-Rate Rental Units in Smaller Properties Seattle, 2016					
Units in Small Apartment Complexes (5-19 units per complex):	**Studio**	**1 BR**	**2 BR**	**3 BR**	
Average rent	$1,125	$1,300	$1,723	$2,417	
	71% of AMI	77% of AMI	85% of AMI	103% of AMI	
Median rent	$1,136	$1,280	$1,726	$2,426	
	72% of AMI	76% of AMI	85% of AMI	103% of AMI	
25th percentile rent	$989	$1,105	$1,450	$2,001	
	62% of AMI	65% of AMI	71% of AMI	85% of AMI	
Units in Small Multiplexes (2 to 4 units):	**Studio**	**1 BR**	**2 BR**	**3 BRs**	
Average rent	$983	$1,272	$1,636	$2,381	
	62% of AMI	75% of AMI	80% of AMI	101% of AMI	
Median rent	$901	$1,212	$1,597	$2,316	
	57% of AMI	72% of AMI	79% of AMI	99% of AMI	
25th percentile rent	$722	$1,089	$1,345	$2,096	
	46% of AMI	64% of AMI	66% of AMI	89% of AMI	
Single-Family Rentals:		**1 BR**	**2 BR**	**3 BR**	**4 BR**
Average rent		$1,607	$2,237	$2,975	$3,620
		95% of AMI	110% of AMI	127% of AMI	138% of AMI
Median rent		$1,588	$2,163	$2,892	$3,497
		94% of AMI	106% of AMI	123% of AMI	133% of AMI
25th percentile rent		$1,331	$1,749	$2,468	$2,925
		79% of AMI	86% of AMI	105% of AMI	112% of AMI

Sources: "2016 Monitoring Report: Affordability of Unsubsidized Rental Housing in Seattle," prepared by the City of Seattle's Office of Housing and Office of Planning & Community Development. Dupre + Scott Apartment Advisors, Inc.

Notes: Rents analyzed for these smaller properties are from Dupre + Scott' spring 2016 surveys, with adjustments for time to approximate fall 2016 rents. Small numbers of 4-bedroom units in small apartment complexes and small multiplexes, and small numbers of studios in single-family rentals were omitted to streamline analysis. (See also notes in Tables 2.2 and 2.3)

Some considerations are useful to keep in mind as one digests these data:

- **The gross rents described are rents for *occupied* units. In strong rental markets, like Seattle's market in 2016, asking rents tend to be higher than rents charged for existing tenants.**
- **Affordability does not equal availability; many market-rate units affordable at low-income levels are occupied by higher income households.** Analysis in the Comprehensive Plan Housing Appendix found that about a third of all rental units affordable at 50% of AMI and at 80% of AMI were occupied by households with incomes above these respective AMI levels.

ADDITIONAL FINDINGS ON THE AFFORDABILITY OF MARKET-RATE HOUSING IN SEATTLE

Additional highlights from the 2016 monitoring report on the Affordability of Unsubsidized Rental Housing in Seattle are below. For more details, see the full report.

- **Average rents in the newest properties are markedly higher than those in older properties.** Medium to large apartment complexes tend to contain more expensive units than smaller properties, in part because the former tend to be newer.
- **Neighborhoods defined by Dupre + Scott show large differences in average rents between the most expensive areas (e.g., Belltown/Downtown/South Lake Union, Green Lake/Wallingford, Ballard, and First Hill) and the least expensive (e.g., Beacon Hill, Rainier Valley, White Center, and North Seattle).** While not specific to urban centers and villages, these findings suggest that there is also much variation in market-rate rents among urban centers and villages, albeit with most centers and villages largely unaffordable to low-income households.

Note: Dupre + Scott closed their business in 2017. City staff in the Office of Housing and the Office of Planning and Community Development are working to identify a new data source that we can use for these monitoring reports in the future.

The Puget Sound Regional Council recently obtained, and shared with the City of Seattle, data from Dupre + Scott on rents in urban centers in Seattle and elsewhere in the region. Those data are summarized on the next two pages.

A region-wide look at the affordability levels of market-rate rental housing

The Puget Sound Regional Council (PSRC) obtained data from Dupre + Scott's spring 2017 survey to better understand the rental housing market and inform how the VISION 2050 update will address housing affordability challenges. PSRC obtained these data for areas at a variety of geographic levels ranging from the region as a whole to individual urban centers.

Regional planning related to housing affordability—The Regional Growth Strategy and Multicounty Planning Policies in VISION 2040 provide a framework for countywide planning policies and local comprehensive plans.

> The housing affordability policies in VISION 2040 aim to achieve a sufficient, varied, and equitably distributed supply of housing "to meet the needs of households of all income levels." These policies also call on cities to "expand the supply and range of housing, including affordable housing, in centers throughout the region."

The Puget Sound Regional Council recently began scoping to update the regional VISION. Unsurprisingly, housing affordability is a key topic people want VISION 2050 to address. In a survey to help scope the update, high cost of living was most commonly identified when respondents were asked what they like least about living in the region; furthermore, 6 in 10 respondents said it is difficult for them to access housing that they can afford.

UNITS IN MEDIUM TO LARGE APARTMENT COMPLEXES

The following findings are for market-rate units in apartment complexes with 20 or more units. Figures 2.2 and 2.3, and Table 2.5 summarize the data.

The affordability profile of market-rate apartment units varies greatly within the region:

- **Within the region as a whole, somewhat under half (44%) of units in medium to large apartment complexes are affordable with a household income of 80% of AMI.**
- **Within the city of Seattle, the share of units affordable at 80% of AMI is only 21 percent, which *is less than half the share* for the region as a whole.** In East King County, the share of units affordable at 80% of AMI is even lower—just 8 percent.
- **In marked contrast, in South King County a substantial majority (79%) of rentals in complexes of this size can be afforded at 80% of AMI.** More modest majorities are affordable in this income range in Kitsap, Pierce, and Snohomish counties.

The affordability of market-rate apartment units varies tremendously from one urban center to another. Within Seattle:

- **Northgate** and the **University District** are the centers that have the least expensive rentals. In these centers, the data indicate that roughly 30 percent of market-rate units are affordable with an income of 80% of AMI. In contrast, just 6 percent of units in **Downtown Seattle** and only 2 percent of units in **South Lake Union** can be rented affordably at 80% of AMI.
- Wide variation among urban centers is also apparent when comparing the proportions of the market comprised of higher-cost rentals. Of all the urban centers in the region for which PSRC was able to obtain data, **Downtown Seattle** and **South Lake Union** have the highest shares of units requiring incomes higher than 120% of AMI to be affordable. In **Downtown Seattle**, slightly more than half (53%) of market-rate rental units require an income of at least 120% of AMI to be affordable. In **South Lake Union**, 43 percent of these units require an income that high. Less than 10 percent of market-rate apartments in **Northgate** and the **University District** are that expensive to rent.

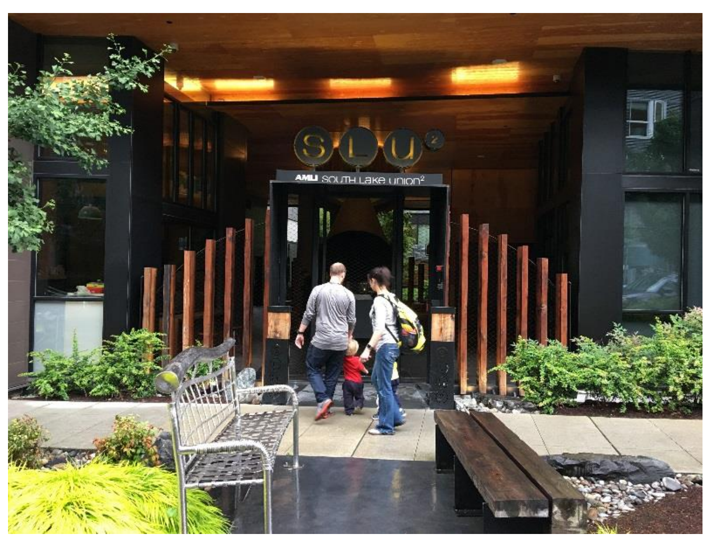
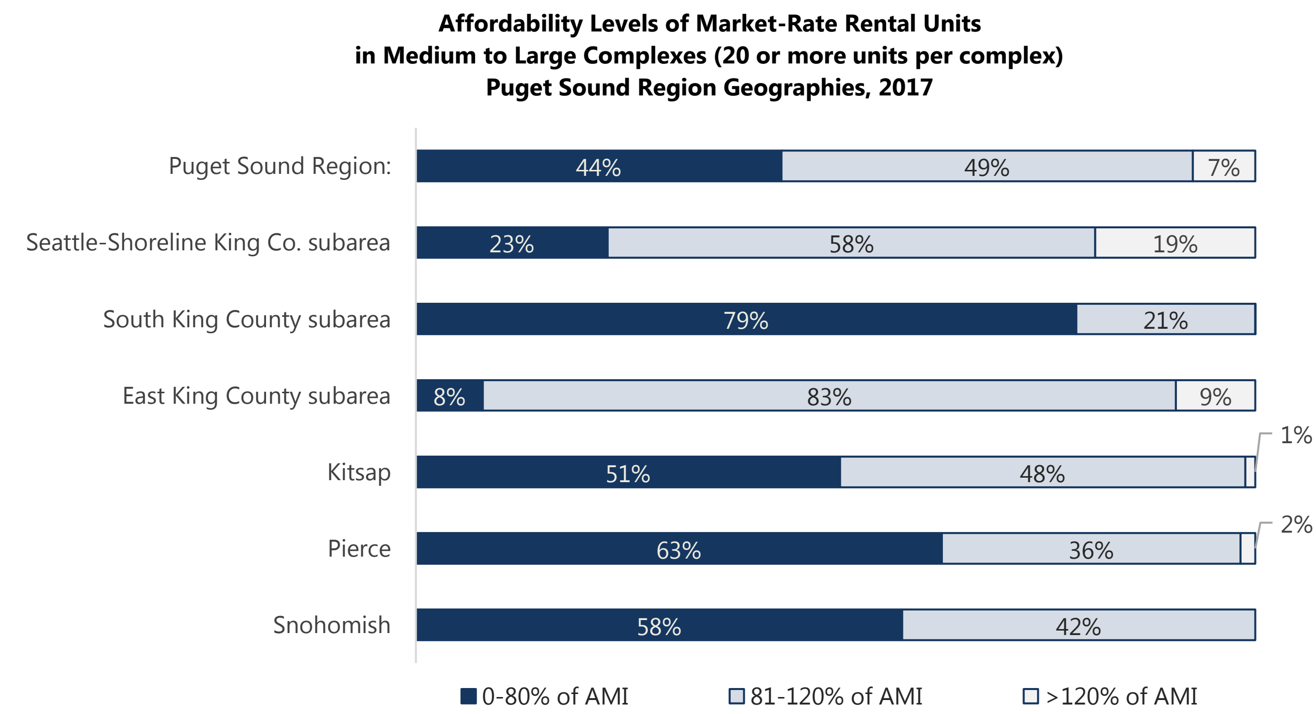
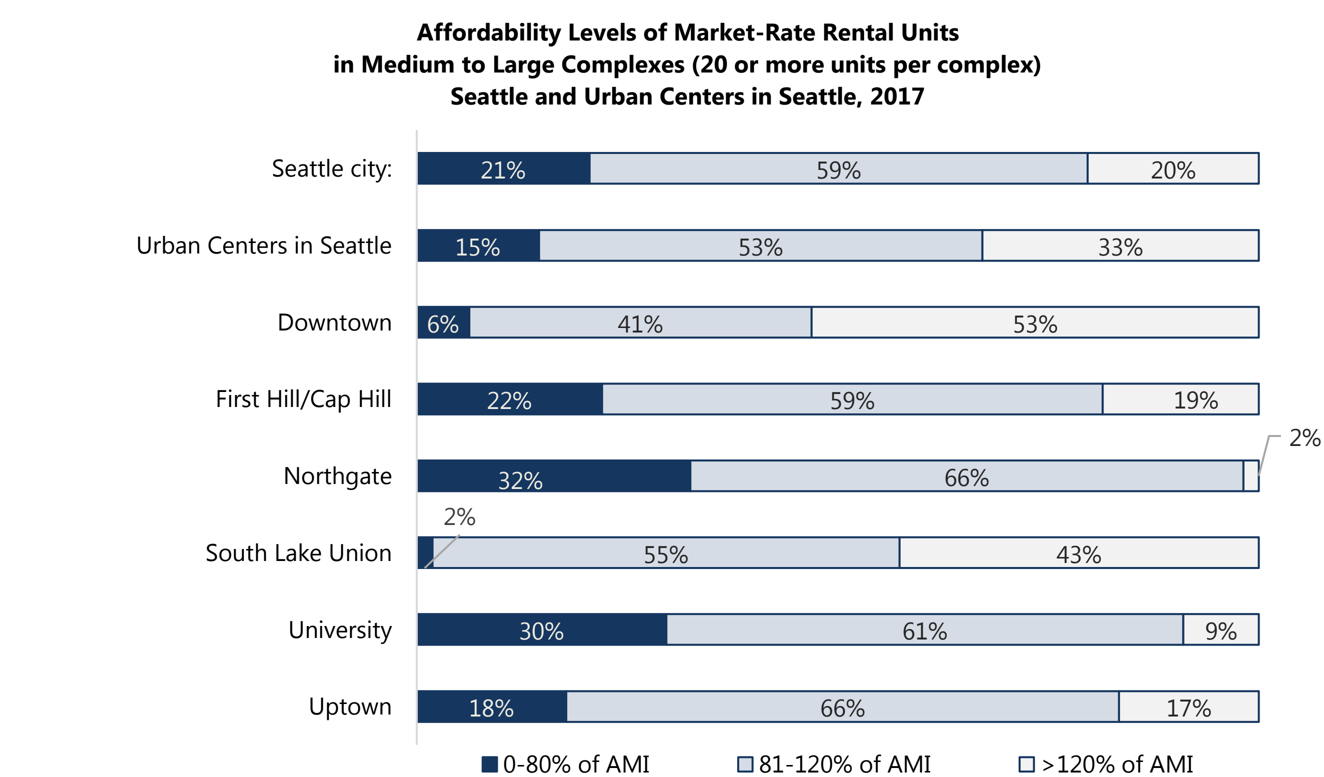


Figure 2.2



Sources and notes: see Figure 2.3, below.

Figure 2.3



Sources: Dupre + Scott Apartment Advisors, Inc. custom tabulation of rent survey data for the Puget Sound Regional Council.

Notes: Statistics are for gross rents in occupied rental units, which include rents plus estimates of costs for tenant-paid utilities. Income levels are based on 2017 AMI calculated and adjusted for household size by HUD. Affordability calculations incorporate standardized household size to unit size ratios.

Table 2.5

Affordability Levels of Market-Rate Rental Units in Medium to Large Complexes (20 or more units per complex) Four-County Puget Sound Region and Selected Geographies Within, 2017			
	Share of Rental Units Affordable at Specified AMI Level		
	80% of AMI	120% of AMI	>120% of AMI
Puget Sound Region:	**44%**	**49%**	**7%**
King County:	**36%**	**54%**	**11%**
Seattle-Shoreline subarea:	**23%**	**58%**	**19%**
Seattle city:	**21%**	**59%**	**20%**
Urban Centers in Seattle:	15%	53%	33%
Downtown	6%	41%	53%
First Hill/Cap Hill	22%	59%	19%
Northgate	32%	66%	2%
South Lake Union	2%	55%	43%
University	30%	61%	9%
Uptown	18%	66%	17%
South King County subarea:	**79%**	**21%**	**0%**
Urban Centers in South King County:*			
Auburn	44%	56%	0%
Burien	100%	0%	0%
Kent	0%	100%	0%
Renton	8%	92%	0%
SeaTac	100%	0%	0%
East King County subarea:	**8%**	**83%**	**9%**
Urban Centers in East King County:*			
Bellevue	0%	65%	35%
Kirkland Totem Lake	14%	86%	0%
Redmond Downtown	0%	85%	15%
Redmond-Overlake	0%	98%	2%
Kitsap:	**51%**	**48%**	**1%**
Urban Centers in Kitsap County:*			
Bremerton	25%	37%	38%
Silverdale		100%	0%
Pierce:	**63%**	**36%**	**2%**
Urban Centers in Pierce County:*			
Lakewood	99%	1%	0%
Puyallup Downtown	100%	0%	0%
Puyallup South Hill	47%	53%	0%
Tacoma Downtown	42%	47%	10%
Tacoma Mall	52%	48%	0%
Snohomish:	**58%**	**42%**	**0%**
Urban Centers in Snohomish County:*			
Bothell Canyon Park	0%	100%	0%
Everett	54%	46%	0%
Lynnwood	100%	0%	0%

Sources: Dupre + Scott Apartment Advisors, Inc. custom tabulation of rent survey data for PSRC.
Notes: Statistics are for gross rents (rent plus tenant-paid utilities) in occupied units. Income levels based on 2017 AMI as calculated and adjusted for household size and other factors by HUD. Affordability incorporates standardized household to unit size ratios.
*Data not included for some urban centers because too few properties returned surveys for data to be reliable. Percentages may not add to 100% due to rounding.

Supply of Income-Restricted Affordable Housing

The housing market in Seattle supplies very limited quantities of housing affordable to low-income households. Furthermore, the market-rate housing that is affordable at low-income levels may be occupied by higher income households and therefore unavailable to low-income households.

Income-restricted affordable units play an essential role in low-income households' ability to access housing in Seattle and remain in their neighborhoods as the city grows. Increasing the number of these units is vital for advancing racial and social equity, especially as the broader economy drives increased income disparities and higher housing costs.

Photos of Croft Place
Courtesy of Seattle Office of Housing

Key policy guidance

The Comprehensive Plan includes numerous policies to spur and guide the growth of affordable housing. These goals aim to increase housing choice and opportunity throughout the city, especially in urban centers and urban villages.

A key affordability goal in the Plan, Goal H G5, is to "Make it possible for households of all income levels to live affordably in Seattle and reduce over time the unmet housing needs of lower-income households in Seattle." Given that the for-profit market rarely supplies housing affordable to households with extremely-low (0-30% of AMI) or very-low (30-50% of AMI) incomes, it is generally up to the City and non-profit entities to help supply housing affordable at those levels. When the City provides funding to build affordable housing, it places the greatest priority on housing for these lowest-income households.

One of the main ways the City advances this goal is by creating and preserving income-restricted affordable housing, largely through funds from the Seattle Housing Levy, which voters renewed in 2016. Other important City-administered fund sources include payments from developers through the City's Incentive Zoning program and, looking ahead, through the City's Mandatory Housing Affordability program.

Links to some of the relevant goals and policies in the Comprehensive Plan:

Housing element

H G3
H G5
H 5.2
H 5.3
H 5.4
H 5.6
H 5.7
H 5.8
H 5.9
H 5.13
H 5.18
H 5.19

The City also offers incentives for developers to provide income-restricted housing affordable to households with incomes less than or equal to 80% of AMI (or slightly higher depending on the program and unit size).

The Comprehensive Plan references the multi-strategy Housing Affordability and Livability Agenda (HALA), which was approved by City policy makers in 2015 to accelerate growth in both income-restricted affordable housing and the city's overall housing supply. Over 10 years, HALA aims for 50,000 additional housing units, including a net increase of 20,000 income-restricted units dedicated to low-income households. Mandatory Housing Affordability (MHA) is a cornerstone of HALA. (See text box below for more on MHA.)

Mandatory Housing Affordability (MHA) is a new requirement for developers of new commercial and multi-family housing to either include affordable housing as part of their development or make a payment to support affordable housing in Seattle. In exchange for creating affordable housing, developers are allowed to build taller or more dense buildings on their property.

MHA has been implemented in Downtown, South Lake Union, the University District, 23rd and Union-Jackson and a few other recently up-zoned areas. The City Council is currently considering legislation to expand the MHA program.

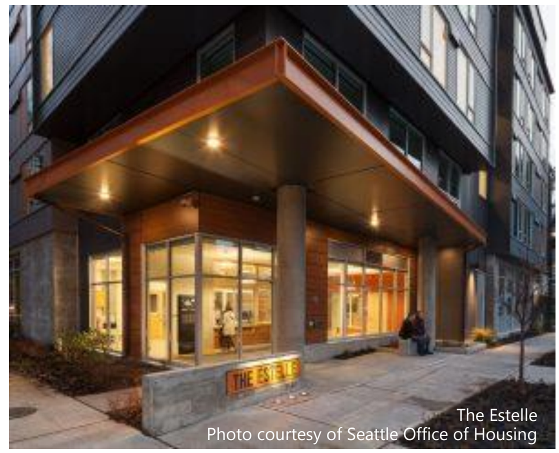
Indicator: Number of income-restricted affordable housing units

This indicator topic tracks the number of income-restricted affordable housing units in Seattle and examines the change in this number since the beginning of the Comprehensive Plan monitoring period. In reporting on the change in the supply of these units, we include increases associated with both newly built income-restricted affordable housing and existing housing that is newly income-restricted. We also account for losses in income-restricted housing due to factors such as demolitions and expirations of affordability covenants.

What the data show

IN THE CITY AS A WHOLE

Table 2.6 summarizes how the amount of income-restricted affordable housing in Seattle has changed between January 2016 and March 2018.



The Estelle
Photo courtesy of Seattle Office of Housing

- **At the beginning of 2016, Seattle had about 27,740 income-restricted affordable housing units in Seattle, the very large majority of which were rental units.**
- **As of March 31, 2018, the supply of income-restricted affordable housing in Seattle totaled approximately 29,370 units.** These include approximately 29,180 rental units and over 190 homeowner units. The rental units include housing for low-income households as well as units for individuals and families transitioning from homelessness. The homeowner units are resale-restricted units with legally binding agreements ensuring affordability for current and future low-income homeowners.
- **Between 1/1/2016 and March 31, 2018, the supply of income-restricted affordable housing in the city increased by 1,636 net units. This included a net increase of 1,618 rental units and 18 owner units.**

As detailed in the table, 2,296 income-restricted affordable rental units were placed in service while rent- and income-restriction requirements expired on 678 units, the majority of which were demolished for redevelopment that is underway at Yesler Terrace. (The Seattle Housing Authority developed Yesler Terrace in the early 1940s as the city's first publicly subsidized housing community. Redevelopment and revitalization of Yesler Terrace began in 2006. In addition to replacing all 561 original units for households earning no more than 30 percent of area median income, SHA is increasing affordable housing opportunities by creating up to 1,100 additional low-income units in the Yesler neighborhood.)

Table 2.6

Seattle Income-Restricted Affordable Housing Supply and Increase from Beginning of 2016 Through First Quarter 2018

	Existing 1/1/2016	Added from 1/1/2016 through 3/31/2018	Lost from 1/1/2016 through 3/31/2018	Net increase from 1/1/2016 though 3/31/2018	Existing 3/31/2018
Income-restricted affordable housing units:	27,736	2,314	678	1,636	29,372
Rental	27,561	2,296	678	1,618	29,179
Owner housing with long-term resale restrictions	175	18	0	18	193

Source: City of Seattle Office of Housing

Several governmental and non-governmental agencies, using various funding sources, have helped build the supply of income-restricted affordable housing in Seattle. This includes housing funded by the City of Seattle and other public agencies, housing owned by the Seattle Housing Authority, and housing owned by private (non-profit or for-profit) developers and landlords. In many of the properties with subsidized rental units, subsidies come from a combination of sources.

As of March 2018, approximately 2,500 additional income-restricted affordable units, not shown in Table 2.6, have been funded and are in various stages of development anticipated to come online by 2021. This does not include affordable units that will be included in otherwise market-rate buildings through the Multifamily Tax Exemption, housing bonus, and Mandatory Housing Affordability programs.

Additional detail about affordable housing and related programs is provided on page 51.

IN URBAN CENTERS AND VILLAGES

The following information describes the geographic distribution of income- and rent-restricted housing. Table 2.7 shows the numbers and shares of these units within urban centers and villages. This table includes statistics on units placed in service between January 2016 and March 2018, and units in service at end of this time period.

Of the rent- and income-restricted units existing in Seattle as of March 2018, roughly 82 percent are inside urban centers and villages.

In comparison, *nearly all* (99%) of the net growth in the city's supply of income-restricted affordable rental units between January 1, 2016 and March 31, 2018 occurred within urban centers and villages. This finding generally aligns with the City's intention to guide most residential growth to centers and villages, where access to transit, services, retail, and many other amenities is greatest. At the same time, this finding also highlights the *very small number* of rent- and income-restricted units recently added outside of centers and villages.

Table 2.7

Rent- and Income-Restricted Housing in Seattle by Location
Net Increase in Units and Total Units in Service

	Number of Units		Percentage of Units	
	Net Increase from 1/1/2016 through 3/31/2018	**In Service 3/31/2018**	**Share of Total Net Increase 1/1/2016 through 3/31/2018**	**Share of Total Units in Service 3/31/2018**
In Seattle as a whole:	**2,296**	**29,179**	**100.0%**	**100.0%**
Inside Urban Centers & Urban Villages:	**2,277**	**24,048**	**99.2%**	**82.4%**
Urban Centers (total)	1,123	12,943	48.9%	44.4%
Hub Urban Villages (total)	412	4,540	17.9%	15.6%
Residential Urban Villages (total)	742	6,523	32.3%	22.4%
Manufacturing & Industrial Centers	**0**	**42**	**0.0%**	**0.1%**
Outside Urban Centers & Villages	**19**	**5,131**	**0.8%**	**17.6%**

Source: City of Seattle Office of Housing

Table 2.8 shows the numbers and percentages of rent- and income-restricted housing in service as of March 2018, at a more detailed level within urban centers and in each of the city's urban villages.

Table 2.8

Rent- and Income-Restricted Housing Units in Service in Seattle as of March 31, 2018
By Individual Urban Center and Urban Village Locations

	Number of Units	Percent		Number of Units	Percent
In the City as a Whole:	**29,179**	**100.0%**			
Inside Urban Centers and Villages:	**24,048**	**82.4%**			
Urban Centers and neighborhoods therein:	**12,943**	**44.4%**	**Residential Urban Villages:**	**6,523**	**22.4%**
Downtown:	6,219	21.3%	23rd & Union-Jackson	1,124	3.9%
Belltown	2,174	7.5%	Admiral	114	0.4%
Chinatown-International District	1,443	4.9%	Aurora-Licton Springs	186	0.6%
Commercial Core	926	3.2%	Columbia City	856	2.9%
Denny Triangle	777	2.7%	Crown Hill	100	0.3%
Pioneer Square	899	3.1%	Eastlake	112	0.4%
First Hill/Capitol Hill:	4,170	14.3%	Green Lake	206	0.7%
12th Avenue	625	2.1%	Greenwood-Phinney Ridge	258	0.9%
Capitol Hill	1,442	4.9%	Madison-Miller	505	1.7%
First Hill	1,424	4.9%	Morgan Junction	102	0.3%
Pike/Pine	679	2.3%	North Beacon Hill	247	0.8%
Northgate	525	1.8%	Othello	1,313	4.5%
South Lake Union	998	3.4%	Rainier Beach	584	2.0%
University District:	709	2.4%	Roosevelt	174	0.6%
Ravenna	73	0.3%	South Park	80	0.3%
University Campus	-	0.0%	Upper Queen Anne	112	0.4%
University District Northwest	636	2.2%	Wallingford	143	0.5%
Uptown	322	1.1%	Westwood-Highland Park	307	1.1%
Hub Urban Villages:	**4,540**	**15.6%**	**Manufacturing/Industrial Centers:**	**42**	**0.1%**
Ballard	650	2.2%	Ballard/Interbay/Northend	-	-
Bitter Lake Village	1,469	5.0%	Greater Duwamish	42	0.1%
Fremont	269	0.9%	**Outside Urban Centers and Villages**	**5,131**	**17.6%**
Lake City	627	2.1%			
Mt. Baker (North Rainier)	952	3.3%			
West Seattle Junction	573	2.0%			

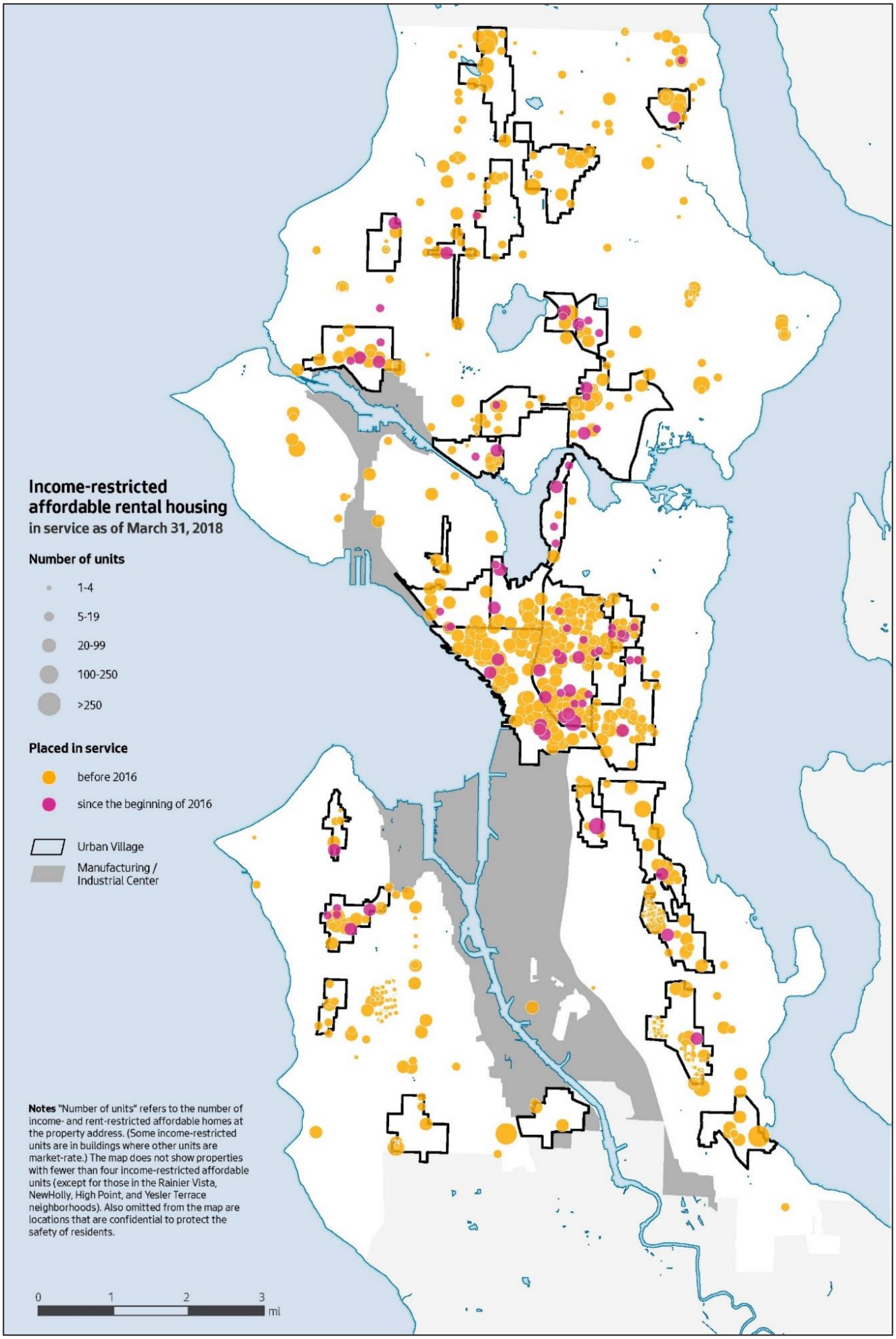
Source: City of Seattle Office of Housing

Within urban centers, the largest numbers of rent- and income-restricted housing units are in **Downtown** where there are roughly 6,200 such units, and in **First Hill/Capitol Hill** where there are 4,200. **South Lake Union** has nearly 1,000 rent- and income-restricted units. Together, these three centers contain nearly 40 percent of Seattle's total rent- and income-restricted housing units. This reflects over 30 years of prioritizing investments in Seattle's centrally located neighborhoods in response to the rapid loss of low-income units in the late 1970s and 1980s due to rent increases, change of use, and redevelopment.

There are three urban villages with roughly 1,000 or more rent- and income-restricted units apiece: **Othello**, **23rd & Union Jackson**, and **Bitter Lake Village**. In the **Othello** residential urban village, over half of the units are public housing in Seattle Housing Authority's mixed-income NewHolly neighborhood. The **23rd & Union-Jackson** residential urban village and **Bitter Lake** hub urban village are examples of neighborhoods where affordable housing production and preservation can help mitigate the risk of displacement of residents struggling to make ends meet.

Figure 2.4 presents a map of Seattle showing locations of properties with income- and rent-restricted units in service as of the end of March 2018. The dots denoting locations are sized to indicate the numbers of income-restricted units per property, and are color-coded to identify whether the income-restricted units were recently placed in service. Properties with income-restricted units placed in service since the beginning of 2016 are identified with magenta dots. This map was produced using the Rent- and Income-Restricted Housing dataset published by the Seattle Office of Housing on the City's Open Data portal. This dataset is available to the public and is updated on a periodic basis.

Figure 2.4 Locations of Rent- and Income-Restricted Housing in Seattle



Source: Seattle Office of Housing. Map produced by Office of Planning & Community Development.

BACKGROUND ON HOUSING PROGRAMS IN SEATTLE

Income-restricted affordable rental units

Over half of Seattle's income-restricted affordable rental units were produced through City of Seattle funding and incentive programs. The Seattle Housing Levy has proven to be the most critical source of capital subsidy for production and preservation of low-income housing by the City to date.

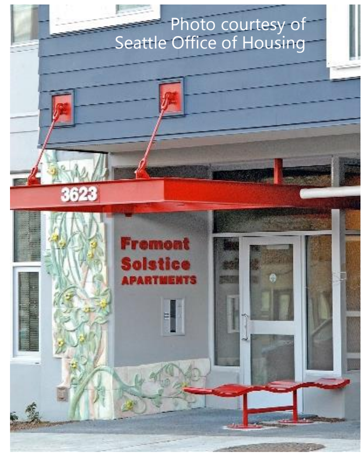


Photo courtesy of Seattle Office of Housing

Affordability covenants for City-funded income-restricted rental housing typically have a minimum term of 50 years and may be extended.

Subsidy-based programs emphasize deeper affordability than do most incentive-based programs. At present, just over half of the units in the City's subsidy portfolio are for households with incomes no greater than 30% of AMI. About 85 percent of the units in the Seattle Housing Authority's portfolio are affordable to households in that range. Housing developments receiving support solely from the Washington State Housing Finance Commission tend to serve households with incomes no greater than 60% of AMI. The City's Multifamily Tax Exemption program, in contrast, restricts rents to no more than 65 to 85% of AMI, with some exceptions, both lower and higher, depending on unit size.

Income- and resale-restricted affordable homeowner units


Valtera Townhomes
Photo courtesy of
Seattle Office of Housing

The City uses funds from the Seattle Housing Levy and various other sources to help provide affordable, sustainable homeownership opportunities for low-income households. One of the ways the City helps to create such opportunities is by providing loans to qualified developers to acquire or build homes to sell to low-income homebuyers at affordable sales prices. Resales of these homeowner units are restricted to ensure that only low-income first-time households can purchase the units, and to preserve the affordability of the units for at least 50 years.

Other types of housing-related assistance provided by the City


Homebuyer Program
Photo courtesy of
Seattle Office of Housing

The City provides other forms of housing-related assistance not captured in the indicators for this monitoring report. These programs advance a variety of objectives including expanding access to housing and combatting displacement of low-income households. Examples include low-income weatherization programs; loans and grants to help low-income homeowners make home repairs; tenant protections; down payment assistance; education and counseling for assisted homebuyers; and foreclosure prevention.

The City also works with partner agencies and organizations to provide a variety of services for individuals and families experiencing homelessness.

Additional information

Data and reports on the Office of Housing's website provide further details on affordable housing production and preservation in Seattle. The Office of Housing maintains, and periodically updates, the dataset on income- and rent-restricted housing on the City's Open Data site.

Information about the City's programs to address homelessness are available on the Human Services Department's website.

Section 3: Livability

Broad context

The ways the City addresses the challenges and opportunities associated with growth affects Seattle residents' quality of life in profound ways.

One of the main aims of the Comprehensive Plan's Growth Strategy is to improve livability. This strategy guides growth and investment to urban centers and villages in order to better connect more people with the services that make these neighborhoods livable.

While there are many components of livability, some of the most important are access to transit, presence of sidewalks, and access to parks and open space.

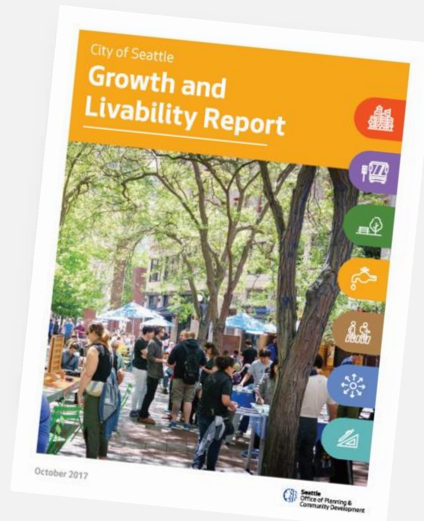
- Co-locating growth and transit in these areas makes it convenient for more people to use transit to get to workplaces and services.
- Investing in sidewalks in these neighborhoods creates pedestrian-friendly and vibrant places where people can easily walk to transit and neighborhood destinations.
- Providing parks and open space in and near centers and villages mitigates the stresses that accompany urban life and provides residents with opportunities for health-promoting outdoor activities.

The topics and indicators we're monitoring

ACCESS TO FREQUENT TRANSIT SERVICE

We're examining access to frequent transit by looking at the percentage of housing units in Seattle that are within a half-mile walk of frequent transit service.

The City's 2017 Growth and Livability Report is a good resource to read alongside our Comprehensive Plan Urban Village Monitoring Report. The Growth and Livability Report describes how Seattle is putting livability at the center of our growth strategy and investments.



That report also includes neighborhood snapshots illustrating tangible ways that the City is working with communities to address local issues and enhance livability. The neighborhoods featured in the Growth and Livability Report are: Crown Hill, Judkins Park, Northgate, Rainier Beach, Roosevelt, Uptown, and West Seattle Junction.

PRESENCE OF SIDEWALKS

We're measuring the completeness of sidewalks within the Priority Investment Network identified in the City's Pedestrian Master Plan.

ACCESS TO PARKS AND OPEN SPACE

To measure access to parks and open space, we are piggybacking on the walkability analysis that Seattle Parks and Recreation performed for the City's 2017 Parks and Open Space Plan. That analysis measures the percentage of housing that is within a short walk of a City park or recreational facility such as a community center.

Access to Frequent Transit Service

Access to frequent transit is a crucial part of neighborhood livability, both for residents who are dependent on transit and for residents who commute to jobs outside their neighborhoods. Having access to frequent transit can also help households save on transportation costs.

The share of housing in proximity to frequent transit is a gauge of whether land use and transportation planning are integrated as envisioned in Seattle's urban village-focused Growth Strategy.

Bus stop for Metro Transit RapidRide E Line and Route 26
Photo courtesy of SDOT

Links to some of the relevant goals and policies in the Comprehensive Plan:

Growth Strategy

GS G1
GS 1.6
GS 1.7
GS 1.10

Land Use element

LU G8
LU 9.2
LU 9.6

Housing element

H 3.5
H 5.7

Transportation element

TG 1
T 1.2
T 1.5
TG 3
T 3.4
T 3.5
TG 4
T 4.3
T 7.7
TG 10
T 10.1

Environment element

EN G3

Key policy guidance

Many elements in the Comprehensive Plan contain policies to support the provision and use of transit as part of creating more livable neighborhoods and enhancing service efficiency in urban centers and urban villages. Many of these policies also aim to reduce reliance on personal vehicles, a major source of greenhouse gas emissions.

The Seattle Department of Transportation's (SDOT's) Transit Master Plan (TMP) identifies the Frequent Transit Network to guide transit service priorities over time in a manner consistent with the Comprehensive Plan. The Frequent Transit Network includes transit corridors that provide high-quality service to urban centers and villages.

People are more likely to use transit when they know service is so frequent that they don't need a schedule. As part of implementing the Levy to Move Seattle (approved by voters in 2015), the City is funding improvements to ensure that by the year 2025 at least 72 percent of Seattle households are within a ten-minute walk of a frequent transit route running every 10 minutes or better. This is one of the specific metrics by which SDOT tracks success on goals identified in the Levy to Move Seattle. The City is also aiming to increase the share of households with access within a 10-minute walk to transit running every 15 minutes or better. (In both cases a half-mile is used to approximate a 10-minute walk.)

Transportation modal master plans and the Levy to Move Seattle—The City has four long-range transportation modal master plans, of which the Transit Master Plan is one; the other three are for bicycles, pedestrians, and freight. All are guided by—and help to implement—the Comprehensive Plan. The MOVE Seattle strategy guides investment of funds from the Levy to Move Seattle to integrate implementation of all four of the City's long-range transportation modal master plans.

Indicators: Shares of housing units within a half-mile walk of weekday transit service a) running every 10 minutes, and b) running every 15-minutes

We're measuring access to frequent transit by tracking the percentage of housing units in Seattle that are within a short walk of frequent transit service. Our methodology for gauging access to frequent transit piggybacks on SDOT's work to monitor the success of the Levy to Move Seattle.

The first indicator we are tracking looks at access to transit service running with a frequency of 10 minutes or better, while the second includes access to routes running every 15 minutes or better. Both indicators measure the percentage of the city's housing units that are within a half-mile walk of transit stops served by one or more routes with the specified service frequencies. Frequency of service is based on average scheduled headways during weekdays between 6 a.m. and 7 p.m.

What the data show

IN THE CITY AS A WHOLE

Within Seattle, as of fall 2017:

- **Sixty-four percent of housing units in Seattle are within a half-mile walk of transit running every 10 minutes or better.**
- **A large majority (88 percent) of Seattle households are within a half-mile walk of transit running every 15 minutes or more frequently.**

Service investments by the City are helping improve access to frequent transit, particularly access to service with 10-minute or better frequency.

- **The share of housing units in Seattle with access to transit running every 10 minutes or more frequently increased by 13 percentage points in just one year.** SDOT estimates that in 2016, 51 percent of households had access to transit service this frequent. (Seattle Transportation Benefit District 2016 Annual Report.)

Table 3.1

Estimated Shares of Housing Units Within a Half-Mile Walk to Frequent Transit Service In the City as a Whole, Urban Centers, and Urban Village Categories Fall 2017

	Share Within a Half-Mile Walk to 10-Minute or Better Service Frequency	Share Within a Half-Mile Walk to 15-Minute or Better Service Frequency
In the City as a whole:	**64%**	**88%**
Inside Urban Centers and Villages:	**84%**	**99%**
Urban Centers:	**89%**	**~100%**
Downtown	~100%	~100%
First Hill/Capitol Hill	79%	100%
Northgate	69%	100%
South Lake Union	~100%	100%
University District	89%	100%
Uptown	98%	100%
Hub Urban Villages	**81%**	**100%**
Residential Urban Villages	**75%**	**97%**
Outside Urban Centers and Urban Villages	**47%**	**79%**

Sources: Seattle Department of Transportation (SDOT) analysis of fall 2017 schedules for bus, light rail, and streetcar service and Office of Planning and Community Development (OPCD) housing estimates for end of 2017.

Notes: Percentages are estimated based on the number of housing units that are in Census blocks within a half-mile walkshed of transit stops served by one or more routes with specified service frequency divided by all housing units within the Census blocks corresponding with the area. Frequency of transit is based on average headways during weekdays between 6 a.m. and 7 p.m.

Statistics listed as "~100%" are equal to or above 99.5% but less than 100%; "~0%" means more than zero but less than 0.5%.

IN URBAN CENTERS AND VILLAGES

The priority placed on urban centers and villages is evident in the data on access to frequent transit service.

Overall within centers and villages:

- **Eighty-four percent of housing units are within a half-mile walk of 10-minute transit service.**
- **Almost all housing (99 percent) is within a half-mile of 15-minute transit.**

There is variation in access to 10-minute service frequency between urban center and village categories, with 89 percent of urban center housing, 81 percent of hub urban village housing, and 75 percent of residential urban village housing located within half a mile of service this frequent**.**

These data are shown in two tables, the first (Table 3.1, on the previous page) provides a broad look at the data while the second (Table 3.2, below) adds detail at the level of individual urban center and village neighborhoods. The 10-minute and 15-minute service walksheds are pictured in the Figure 3.1 map.

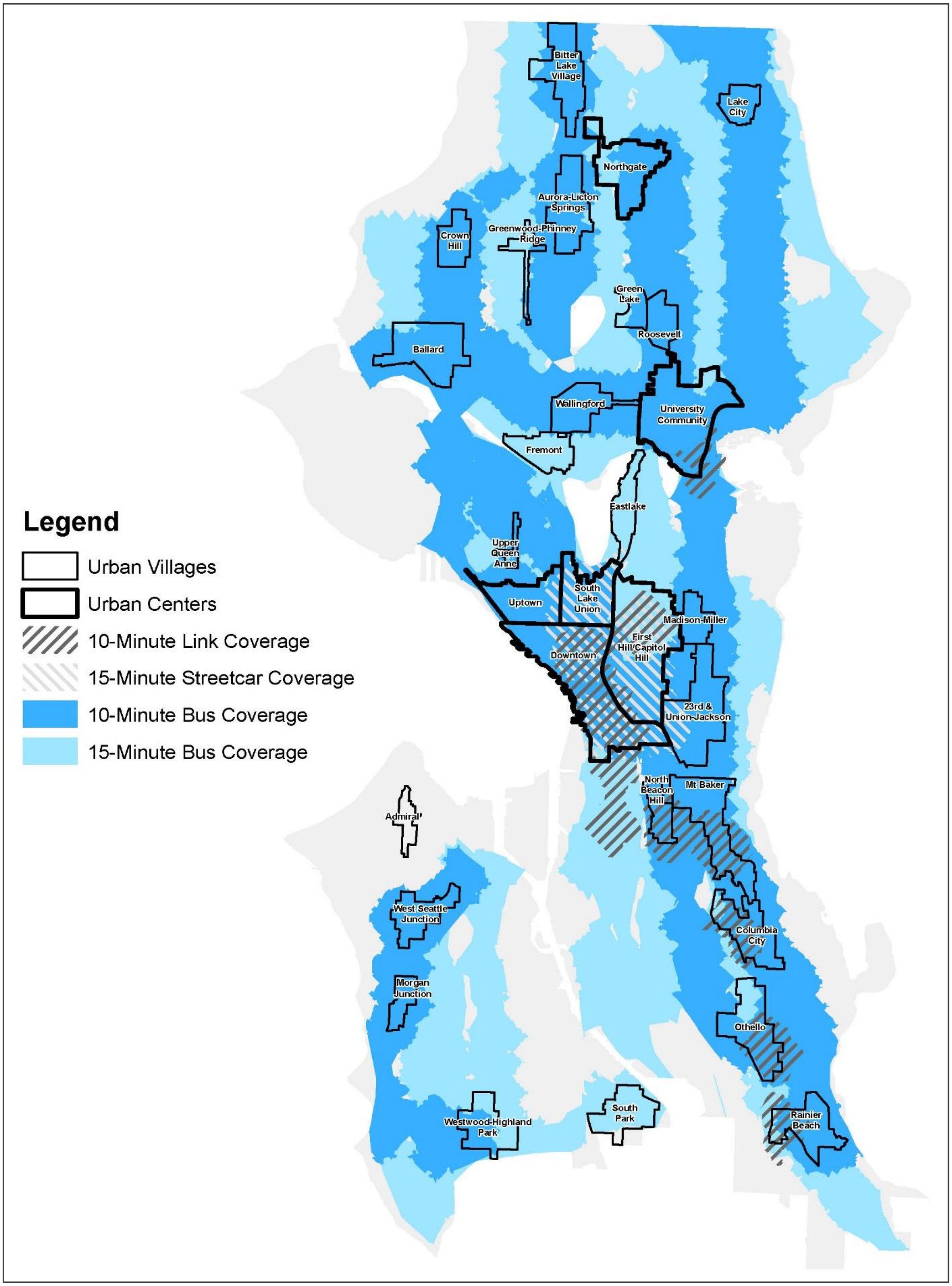
Table 3.2

Estimated Shares of Housing Units by Area Within Close Walking Distance to Frequent Transit Service In the City as a Whole and in Urban Centers and Villages, Fall 2017

	Within Close Walking Distance to:			**Within Close Walking Distance to:**	
	10-Minute or Better Service Frequency	**15-Minute or Better Service Frequency**		**10-Minute or Better Service Frequency**	**15-Minute or Better Service Frequency**
In the City as a Whole:	**64%**	**88%**			
Inside Urban Centers and Villages:	**84%**	**99%**			
Urban Centers & neighborhoods:	**89%**	**100%**	**Residential Urban Villages:**	**75%**	**97%**
Downtown:	~100%	~100%	23rd & Union-Jackson	100%	100%
Belltown	100%	100%	Admiral	0%	0%
Chinatown-International District	100%	100%	Aurora-Licton Springs	97%	100%
Commercial Core	~100%	~100%	Columbia City	100%	100%
Denny Triangle	100%	100%	Crown Hill	100%	100%
Pioneer Square	100%	100%	Eastlake	0%	97%
First Hill/Capitol Hill:	79%	100%	Green Lake	62%	100%
12th Avenue	100%	100%	Greenwood-Phinney Ridge	23%	100%
Capitol Hill	70%	100%	Madison-Miller	100%	100%
First Hill	90%	100%	Morgan Junction	100%	100%
Pike/Pine	79%	100%	North Beacon Hill	100%	100%
Northgate	69%	100%	Othello	81%	100%
South Lake Union	~100%	100%	Rainier Beach	100%	100%
University District:	89%	100%	Roosevelt	100%	100%
Ravenna	35%	100%	South Park	0%	90%
University Campus	100%	100%	Upper Queen Anne	88%	100%
University District Northwest	98%	100%	Wallingford	100%	100%
Uptown	98%	100%	Westwood-Highland Park	42%	100%
Hub Urban Villages:	**81%**	**100%**	**Outside Urban Centers and Villages**	**47%**	**79%**
Ballard	96%	100%			
Bitter Lake Village	67%	100%			
Fremont	1%	100%			
Lake City	100%	100%			
Mt. Baker (North Rainier)	99%	100%			
West Seattle Junction	100%	100%			

Sources: SDOT analysis of fall 2017 schedules for bus, light rail, and streetcar service and OPCD housing estimates for end of 2017.
For notes see Table 3.1.

Figure 3.1 Walksheds for 10-Minute and 15-Minute Transit Service, Fall 2017



Source: SDOT analysis of fall 2017 schedules for bus, light rail, and streetcar service.

For additional notes see Table 3.1.

Among urban centers:

- **Almost all housing in the Downtown, South Lake Union, and Uptown urban centers is within a 10-minute walk to 10-minute transit service.**
- Among urban centers, **Northgate** has the lowest rate of access to 10-minute service, at 69 percent. Notably, however, targeted investments in Metro bus service by the City have dramatically enhanced transit service frequency in this urban center. (As recently as spring of 2017, there were no Northgate housing units with access to 10-minute service.)
- **While there is notable variation among urban centers in access to 10-minute transit service, virtually all housing in all urban centers has access to 15-minute service.**

Among hub urban villages:

- **Of the six hub urban villages in the city, four—Ballard, Mt. Baker (North Rainier), Lake City, and West Seattle Junction—have universal, or near-universal, access to transit running every 10 minutes or better.** The City's recent investments in Metro bus service have dramatically expanded access to 10-minute service in **Lake City**, boosting the share of housing units with this frequency of service from 8 percent in spring of 2017 to 100 percent in fall of 2017.
- Roughly two-thirds of the housing units in **Bitter Lake** have access to 10-minute service.
- Only one percent of housing units in **Fremont** are within the walkshed for 10-minute service.
- **All hub urban village housing has access to 15-minute or better service.**


South Lake Union Streetcar


Link Light Rail
Photo courtesy of SDOT

Metro Transit Route 48
Photo courtesy of SDOT

Among residential urban villages:

- **In ten of the city's eighteen residential villages, all, or nearly all, housing is within a half-mile walk of 10-minute transit service.**
- The majority of housing units in **Green Lake**, and the large majority of housing units in **Othello** and **Upper Queen Anne**, also have access to 10-minute transit service. Access to 15-minute service is universal in all three of these villages.
- Four urban villages have lower rates of access to 10-minute transit service, but universal or close-to-universal access to 15-minute service. These are the **Eastlake**, **Greenwood-Phinney Ridge**, **South Park**, and **Westwood-Highland Park** urban villages. (City investments brought 15-minute service to South Park in fall 2017).
- **Admiral** is unique among urban villages in that none of the housing in this village is within a 10-minute walk of either 10-minute *or* 15-minute transit service. Corridors serving Admiral are identified in the Frequent Transit Network as priorities for upgrades to 15-minute service. (The 2016 Transit Master Plan shows the Frequent Transit Network service upgrades envisioned by 2030. See the first map in Chapter 4 of the TMP.)

Metro Transit Route 7
Photo courtesy of SDOT


Metro Transit Route 60
Photo courtesy of SDOT

Presence of Sidewalks

Walkability is essential for ensuring that urban centers and villages function optimally for residents, and sidewalks are a key ingredient of walkable neighborhoods. The presence of sidewalks on the routes people use to walk to transit and school are particularly important.

As the City's Pedestrian Master Plan states:

> "A quality pedestrian network is at the core of an equitable and accessible transportation system. It is essential for seniors, children and young adults, people with limited mobility, and people...with fewer transportation choices, including many low-income people. . . . In addition, a well-connected, comfortable pedestrian network improves personal health by promoting physical activity."

Links to some of the relevant goals and policies in the Comprehensive Plan:

Growth Strategy

GS 1.10
GS 3.14

Land Use element

LU G8
LU 9.2
LU 9.6

Transportation element

TG 1
T 1.2
T 1.3
T 1.5
T 2.2
TG 3
T 3.1
T 3.2
T 3.13

Environment element

EN 3.1
EN 3.2

Key policy guidance

One of the reasons that Seattle's Urban Village Strategy focuses growth in urban centers and villages is to make it convenient for more people to walk to neighborhood destinations and transit. Pedestrian activity, in turn, helps support local businesses and is part of what fosters the vibrancy of centers and villages.

The Comprehensive Plan includes many policies aimed at improving pedestrian connections and encouraging walking. The Pedestrian Master Plan (PMP), developed by the Seattle Department of Transportation (SDOT), furthers those policies by providing the blueprint for investing in pedestrian improvements.

A key objective of the PMP is completing and maintaining the Priority Investment Network (PIN). This network delineates where the City focuses investments to enhance walking conditions. The PIN emphasizes key walking routes to stops in the Frequent Transit Network and to public schools. The PIN contains slightly more than half of the total blockfaces in the city, about 80 percent of the blockfaces in urban centers and villages, and nearly three-quarters of the arterial blockfaces in the city.

Sidewalk completeness within the PIN is one of the six performance measures that the City uses to track progress in implementing the PMP. The associated target is to complete 100 percent of arterial sidewalks in the PIN by 2035.

Sidewalk maintenance and construction of new sidewalks are among the investments the Levy to Move Seattle (approved in November of 2015) is helping to fund.

Indicator: Percentage of blockfaces within the Priority Investment Network (PIN) that have complete sidewalks.

This indicator measures sidewalk completeness within the PIN in both the city as a whole and in urban centers and urban villages. The data are from sidewalk inventory information recorded in SDOT's Asset Management database as of August 2017. At that time, SDOT was nearly finished with the now complete 2017 Sidewalk Assessment Project. This was a comprehensive effort to update the City's inventory of sidewalk completeness and conditions both within the PIN and citywide.

When calculating the completeness of sidewalks, SDOT uses the "blockface" as the unit of measurement. A block-face refers to one side of a street between two consecutive intersections (or, in some cases, other features). A typical street block has two block faces (i.e., one blockface on each side of the street). A blockface is regarded as having a complete sidewalk when sidewalk is present along the whole length of the blockface.

What the data show

Figure 3.2 presents a map of Seattle showing whether streets in the PIN have complete sidewalks. (Gray lines indicate where streets have complete sidewalks along both sides of the street, while red lines indicate streets with missing sidewalk on one or both sides. Three urban villages are shown as examples in the zoomed-in insets to the right of the citywide map. Table 3.3 lists the percentages of PIN blockfaces that have complete sidewalks within the city as a whole and within urban centers and villages.

Readers can view information on the completeness and conditions of sidewalks, both inside and outside the PIN, by going to SDOT's webpage on walking and viewing the Accessibility Route Planner map.

IN THE CITY AS A WHOLE

- **Overall about 85 percent of the blockfaces in the PIN have complete sidewalks.**
- **The greatest concentration of missing sidewalks in the PIN is north of N 85th Street.** (Although not shown in the map, missing sidewalks along non-PIN streets are also concentrated north of N. 85th Street.) This pattern is a legacy of the development in this area before it became part of Seattle. (See historical context provided on page 64.) **Some of the other prominent concentrations of missing sidewalks are found in the Southeast Seattle and Delridge neighborhoods.**

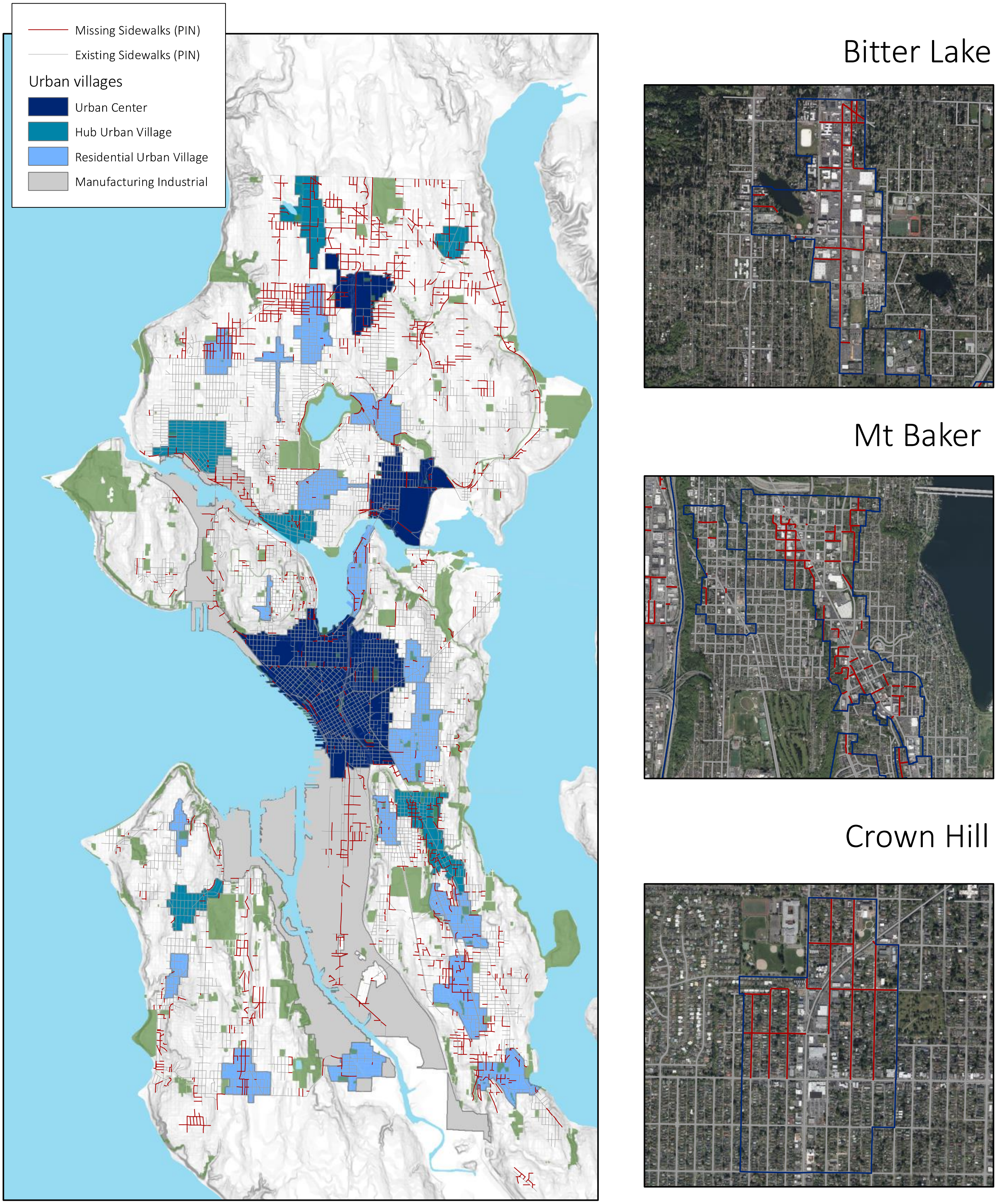
IN URBAN CENTERS AND VILLAGES

- **The share of PIN blockfaces that have complete sidewalks is higher in urban centers and villages than it is in the city as whole. Within urban centers and villages, about 89 percent of the roughly 10,500 PIN blockfaces have complete sidewalks.**
- **Within urban centers, 95 percent of PIN blockfaces have complete sidewalks.**
- **Large majorities of the PIN blockfaces within hub urban villages and within residential urban villages (85% and 88%, respectively) also have complete sidewalks.**

South Lake Union
Photo courtesy of SDOT

Chinatown-
International District

Figure 3.2 Sidewalk Completeness in the Priority Investment Network



Sources: SDOT Asset Management database and GIS analysis, August 2017.
Notes: Priority Investment Network is defined in the 2017 Pedestrian Master Plan. See Table 3.3 for additional notes.

- **While large majorities of PIN blockfaces in each of the city's urban centers have complete sidewalks, there is some variation in completeness rates among urban centers.**

  While two urban centers—**First Hill/Capitol Hill** and **Uptown**—have 99-percent sidewalk completion rates in the PIN, the corresponding completion rates for the **University District** and **Northgate** urban centers are notably lower at 90 percent and 82 percent respectively.

Photo courtesy of SDOT

- **There is wider variation in rates of PIN sidewalk completeness among hub urban villages and among residential urban villages.**
  - In hub urban villages the highest rate is found in **Ballard** (97%) and the lowest in **Bitter Lake** (64%).
  - In residential urban villages the highest rate is found in **Admiral** (100%) and the lowest in **Othello** (65%).
- **In general, urban centers and villages located within a short distance of the downtown core tend to have the highest rates of PIN sidewalk completeness.**
- **Urban centers and villages north of North 85th St. tend to have sidewalk completeness rates below those in the city as a whole.**

  The high rate of sidewalk completeness in **Greenwood-Phinney Ridge residential urban village is an exception to this pattern** and is related to the fact that most of the PIN blockfaces in this village are along arterials, which are more likely to have sidewalks than other streets.

- **Several urban villages in south Seattle also have low rates of PIN sidewalk completion.** These include the **Othello** residential urban village, **Rainier Beach** residential urban village, and **Mt. Baker (North Rainier)** hub urban village, all of which are in southeast Seattle; and **Westwood-Highland Park**, which is in southwest Seattle on the city's southern boundary.

Construction of new sidewalks

A preliminary tally included in the PMP 2018-2022 Implementation Plan and Progress Report indicates that about 30 blocks of new sidewalks were added within the city as a whole between January 2016 to October 2017. The progress report will be updated annually and posted to the PMP document library.

A more complete tally was taken recently to track progress during the first two years of Levy to Move Seattle funding. Per that tally:

- About 59 blocks of new sidewalk were completed between the beginning of 2016 and the end of 2017.
- Approximately 45 blocks of new sidewalks are planned for construction in 2018, with 146 additional sidewalk blocks needed by 2025 in order to meet a Levy to Move Seattle goal of building 250 new blocks of sidewalk during the levy's nine-year duration.

The sidewalks being constructed include both traditional concrete and lower-cost sidewalks.

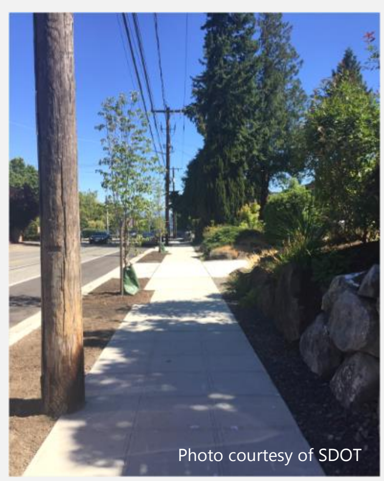


Photo courtesy of SDOT

Table 3.3

Estimated Shares of Priority Investment Network (PIN) Blockfaces with Complete Sidewalks In the City as a Whole and in Urban Centers and Villages September 2017			
	Percent of PIN Blockfaces with Complete Sidewalks		**Percent of PIN Blockfaces with Complete Sidewalks**
In the City as a Whole:	85%		
Inside Urban Centers and Villages:	89%		
Urban Centers and neighborhoods:	**95%**	**Residential Urban Villages:**	**88%**
Downtown:	*95%*	23rd & Union-Jackson	99%
Belltown	97%	Admiral	100%
Chinatown-International District	95%	Aurora-Licton Springs	80%
Commercial Core	92%	Columbia City	88%
Denny Triangle	95%	Crown Hill	67%
Pioneer Square	99%	Eastlake	84%
First Hill/Capitol Hill:	*99%*	Green Lake	96%
12th Avenue	100%	Greenwood-Phinney Ridge	99%
Capitol Hill	99%	Othello	65%
First Hill	98%	Madison-Miller	98%
Pike/Pine	98%	Morgan Junction	97%
Northgate	82%	North Beacon Hill	94%
South Lake Union	93%	Upper Queen Anne	94%
University District:	*90%*	Rainier Beach	71%
Ravenna	86%	Roosevelt	95%
University Campus	78%	South Park	90%
University District Northwest	96%	Wallingford	99%
Uptown	99%	Westwood-Highland Park	76%
Hub Urban Villages:	**85%**	**Manufacturing/Industrial Centers:**	**71%**
Ballard	97%	Ballard-Interbay-Northend	70%
Bitter Lake Village	64%	Greater Duwamish	72%
Fremont	91%	**Outside Urban Centers and Villages**	**81%**
Lake City	79%		
Mt. Baker (North Rainier)	76%		
West Seattle Junction	94%		

Sources: SDOT Asset Management database and GIS analysis as of September 2017.

Notes: As described in the 2017 Pedestrian Master Plan (PMP), some of the blockfaces that lack sidewalks may not be feasible locations for sidewalks. SDOT evaluates locations to determine if new sidewalks are feasible as it implements the PMP.

HISTORICAL CONTEXT ABOUT SIDEWALKS IN SEATTLE

Most of the sidewalks in Seattle were constructed at the time each area of the city was originally subdivided, with the sidewalks paid for through Local Improvement Districts.

Not all developers chose to include sidewalks. Many areas annexed to the city in the 1950s had been developed earlier under the standards of unincorporated King County, which did not require sidewalks.

The City has built or acquired sidewalks through a variety of means including direct capital projects, donation of assets constructed by private developers and other public agencies to meet increased demand, and annexations of adjacent communities.

The age of sidewalks in Seattle ranges from recently constructed to over 100 years old.

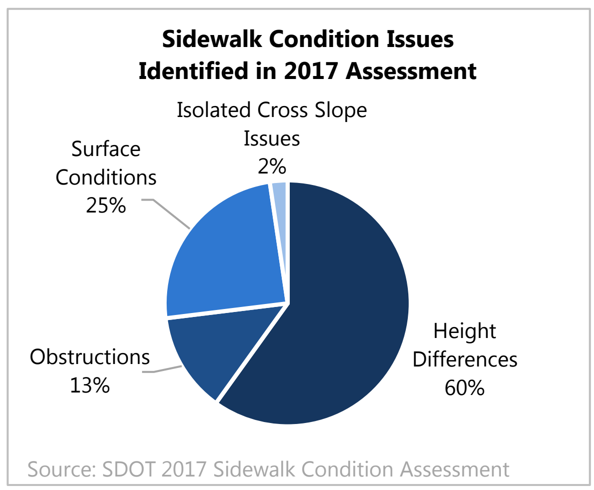

Broadway Ave, 1926
Seattle Municipal Archives

SIDEWALK CONDITIONS IN SEATTLE

During the summer of 2017, SDOT hired college interns to inspect over 34,000 blocks of city sidewalk. The 2017 Sidewalk Condition Assessment Project not only validated data on the completeness of sidewalks, but also produced detailed information on the conditions of existing sidewalks that will help inform repair efforts. The 2017 assessment built on a prior inventory done in 2007 but was the first-ever comprehensive assessment of Seattle's sidewalks.

The 2017 assessment recorded conditions that might impact mobility or indicate asset deterioration. It captured over 155,000 observations about sidewalk condition issues, and the results are reflected in the pie chart in Figure 3.3.

Figure 3.3



The 2017 assessment used a detailed rating system to score each inspected sidewalk and generated data on conditions for 99 percent of Seattle's sidewalks. The condition of over three quarters of the sidewalk blockfaces inspected was rated either good (41%) or fair (37%). Twelve percent of the sidewalk blockfaces were found to be in excellent condition. Smaller percentages were in poor (6%) or very poor (3%) condition. This information is available on SDOT's Accessible Route Planner.


Sidewalk in Queen Anne
Courtesy of SDOT

Maintaining sidewalks in Seattle is a shared responsibility. Seattle's Sidewalk Repair Program addresses sidewalk condition problems and informs property owners when they must repair a sidewalk adjacent to their property according to criteria in the Seattle Municipal Code. SDOT's Sidewalk Repair Program anticipates providing specific observations about sidewalk conditions in a public map that the department will post and maintain beginning in mid-2018.

Access to Parks and Open Space

Access to parks, open space, and recreational facilities promotes people's physical, social, and mental wellbeing in myriad ways. Being able to get outdoors and experience nature within a short walk of one's home is key to livability and health.

Natural areas and greenbelts also help mitigate many types of environmental impacts, improve ecological functioning, and provide wildlife habitat.

Key policy guidance

The Comprehensive Plan contains high-level polices guiding the City's acquisition and provision of parks and open space. Most of these policies are in the Plan's newly added Parks and Open Space element. Related policies are in many other elements of the Comprehensive Plan. The 2017 Parks and Open Space Plan helps translate these goals and policies into reality by analyzing needs and defining priorities for long-term investments by Seattle Parks and Recreation (SPR) to maintain and improve parks and recreation resources.

Both plans emphasize serving urban centers and villages where future population growth will be concentrated, and serving areas where socioeconomic disadvantage and health-related challenges are disproportionately high.

As both plans acknowledge, opportunities for acquiring land for future parks and open spaces are scarce. While the new Seattle Park District has provided funding for maintenance and development of parks on previously acquired sites, the increasing cost and limited availability of land make it difficult to acquire land for new parks, particularly in our most central, and densely developed neighborhoods.

The 2017 Parks and Open Space Plan identifies urban center neighborhoods and urban villages that are priority areas for future land acquisition. An analysis in that plan estimated walking distances to SPR parks, recreational facilities, and open spaces, then applied walkability guidelines to aid in identifying where there are gaps in access to parks and open space. Those walkability guidelines are for a 5-minute walk in urban centers and villages and a 10-minute walk outside of these areas. Social equity factors and the presence of non-SPR parks and open spaces were considered alongside the walkability-based analysis.

Links to some of the relevant goals and policies in the Comprehensive Plan:

Growth Strategy

GS 1.4
GS 1.22

Capital Facilities element

CF G1

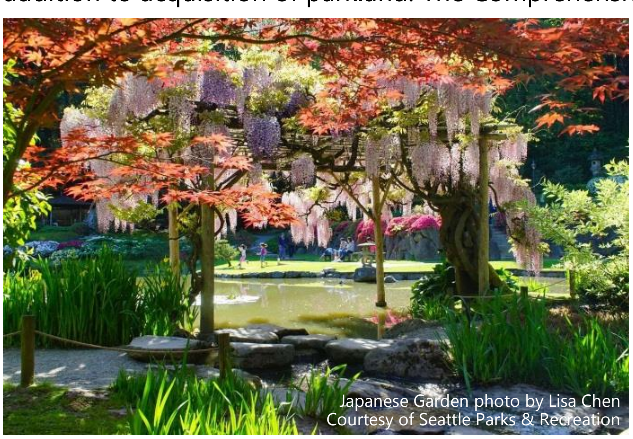
Environment element

EN 3.2

Parks and Open Space element

P G1
P 1.1
P 1.11
P 1.2
P 1.3
P 1.5
P 1.7
P 1.17
P G2
P 3.6

Keeping pace with our growing population's need for parks and open space requires a variety of strategies in addition to acquisition of parkland. The Comprehensive Plan contains policies to use existing public land, such as rights-of-way, in innovative ways; incentivize incorporation of publicly accessible open space in private developments; and work with other public agencies to provide public access to open spaces they control.



Japanese Garden photo by Lisa Chen
Courtesy of Seattle Parks & Recreation

Accordingly, the City's 2017 Parks and Open Space Plan incorporates many approaches in addition to land acquisition, and City departments are working together and with community partners on innovative strategies to meet the open space and recreation needs of our growing population.

Indicators: Access to City Parks and Recreational Facilities

- ***Percentage of housing units in the city that are within a half-mile (10-minute) walk of an SPR park/recreational facility of 10,000 or more square feet***
- ***Percentage of housing units in urban centers and urban villages that are within a quarter-mile (5-minute) walk of an SPR park/recreational facility of 10,000 or more square feet***

These indicators use the walkability analysis that SPR performed for the 2017 Parks and Open Space Plan. That analysis estimates the walking distance to SPR-owned park land, recreational facilities (e.g., community centers and swimming pools), and open space of 10,000 square feet or more in area. The walkability analysis also includes a small number of sites owned by other public entities but maintained by SPR. However, the walkability analysis does *not* include non-SPR-owned parks and open space such as Seattle Center, Hiram M. Chittenden Locks; and the Olympic Sculpture Park. For brevity, we refer to all the types of parkland and facilities included in the gap analysis as "SPR parks."

The walkability analysis measures walking distance along the existing street grid, with a quarter-mile walk used to approximate a 5-minute walk and a half-mile walk used to approximate a 10-minute walk.

Capital projects—The 2017 Parks and Open Space Plan identifies capital projects planned for 2017 to 2023. These include fourteen new neighborhood parks and park expansions at land-banked sites including Christie Park expansion (in the University District), Baker Park expansion (in Crown Hill), Greenwood Park expansion, North Rainer, Greenwood-Phinney Park, AB Ernst Park addition (in Fremont), West Seattle Junction, Wedgwood, Lake City, Denny Triangle, South Park Plaza, and Morgan Junction.

More information is available on [SPR's Current Projects] website and the City's [Open Budget] website.

What the data show

Table 3.4 summarizes findings from the walkability gap analysis that SPR performed for the 2017 Parks and Open Space Plan. The map presented in Figure 3.4 is based on that analysis and shows where households in the city have, or do not have, access to SPR parks within a walkable distance.

IN THE CITY AS A WHOLE

- **An estimated 94 percent of the housing units in Seattle are within a half-mile walk of an SPR park.**

IN URBAN CENTERS AND VILLAGES

- **More than three-quarters (77%) of the housing units in urban centers and villages are within a quarter-mile walk of an SPR park.**
- **The percentage of housing units that are within a quarter-mile walk of an SPR park is higher in urban centers (where 83% of housing units have an SPR park this close) than the percentages in hub urban villages and residential urban villages (58% and 73%, respectively).**
- **However, the shares of housing units within a quarter-mile walk of SPR parks varies between neighborhoods.** This is illustrated in the percentages for individual urban centers, shown in Table 3.4.

TIA International Photography

- **Some neighborhoods where a relatively small percentage of housing units are within a quarter-mile walk of an SPR-owned park nevertheless enjoy access to other parks and open spaces.** Two examples:
  - In the **Uptown urban center**, the Seattle Center provides myriad recreational and cultural opportunities.
  - In the **University District urban center**, the University of Washington's central campus and the Union Bay Natural Area within the campus are significant open space features.

As described earlier, the 2017 Parks and Open Space Plan identifies priority areas for future acquisition based not *only* on gaps in walkable access to SPR-owned parks, but also on whether open space owned by entities other than SPR is nearby. Additional considerations—including the racial and ethnic composition of the population, socioeconomic conditions, public health, population density, and the feasibility of land acquisition—also factored into the prioritization. (See pages 57 to 67 of the Parks and Open Space plan for details.)

Table 3.5 below lists the urban center neighborhoods and urban villages identified as priority areas in SPR's long-term acquisition strategy which is described on pages 82 and 83 in the Parks and Open Space Plan.

Table 3.4

Estimated Percentage of Housing Units Within a Walkable Distance of an SPR Park	
	Share of Housing Units Within a Half-Mile (10-Minute) Walk of an SPR-owned Park
In the City as a whole:	**94%**
	Shares of Housing Units Within a Quarter-Mile (5-Minute) Walk of an SPR-owned Park
Inside Urban Centers and Urban Villages:	**77%**
Urban Centers:	**83%**
Downtown	90%
First Hill/Capitol Hill	90%
University District	68%
Northgate	84%
South Lake Union	92%
Uptown	47%
Hub Urban Villages	**58%**
Residential Urban Villages	**73%**

Sources: Seattle Parks and Recreation (SPR) walkability network analysis performed for the 2017 Parks and Open Space Plan, and housing unit estimates from Office of Planning and Community Development (OPCD). Based on 2016 data.

Notes: Percentages of housing units with access to SPR parks are estimated based on Census-block level analysis of housing units within a quarter-mile walk of one or more SPR-owned parks, recreational spaces, and/or open spaces all subject to minimum area for inclusion of at least 10,000 square feet. Sites land-banked for park development are included.

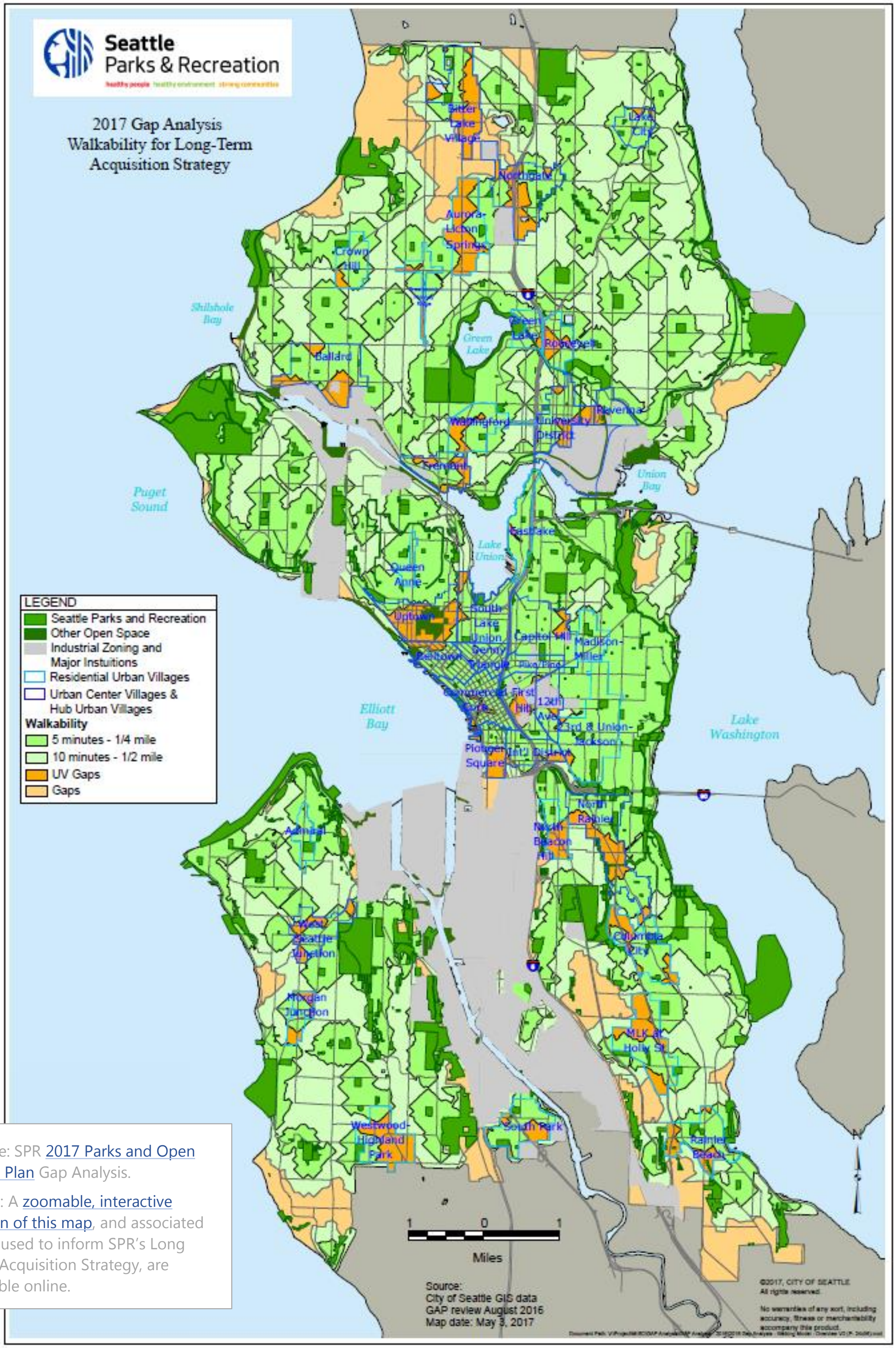
Non-SPR-owned properties (e.g., Seattle Center and open spaces on the University of Washington campus) are not included.

Table 3.5

Priority Areas for Seattle Parks & Recreation's Long-Term Acquisition Strategy	
Urban Centers and Urban Center neighborhoods:	**Residential Urban Villages:**
Northgate urban center	Aurora-Licton Springs
First Hill (part of First Hill/Capitol Hill urban center)	Columbia City
12th Avenue (part of First Hill/Capitol Hill urban center)	Morgan Junction
Hub Urban Villages:	North Beacon Hill
Ballard	Othello
Bitter Lake	Rainier Beach
Fremont	South Park
Mt. Baker (North Rainier)	Westwood-Highland Park
West Seattle Junction	

Source: 2017 Parks and Open Space Plan, Seattle Parks and Recreation.

Figure 3.4 Walkability Gap Analysis 2017 Parks and Open Space Plan



Source: SPR 2017 Parks and Open Space Plan Gap Analysis.

Notes: A zoomable, interactive version of this map, and associated maps used to inform SPR's Long Term Acquisition Strategy, are available online.