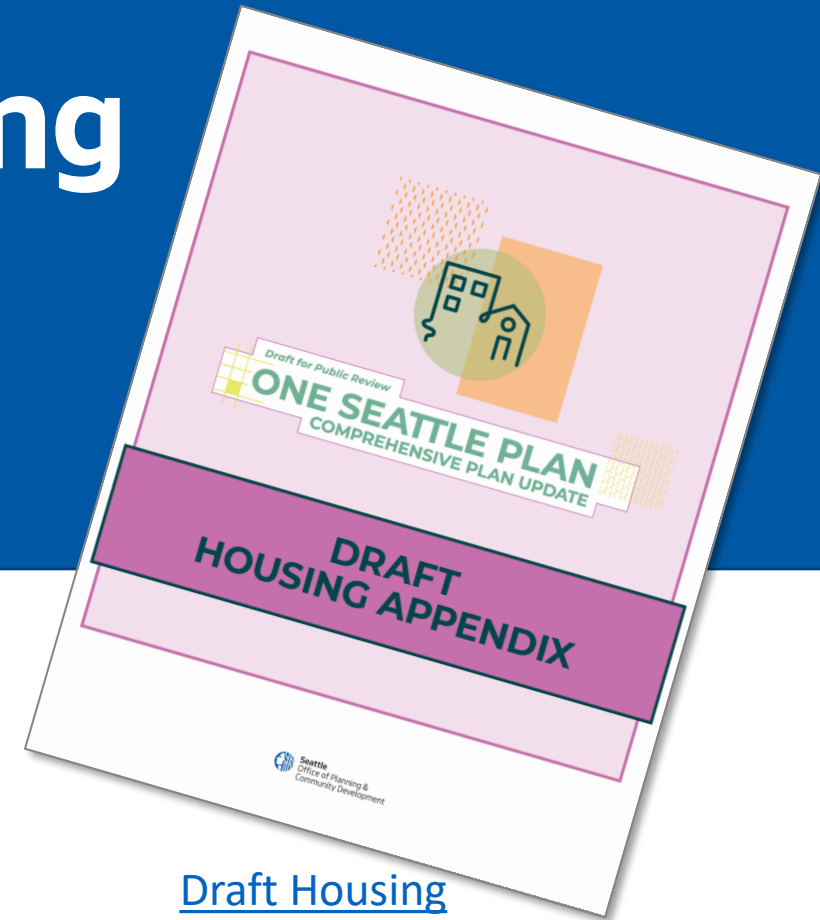


Highlights from the Housing Appendix in the Draft One Seattle Plan

Diana Canzoneri, she/her, Demographer & Strategic Advisor

Phillip Carnell, they/them, Planning & Equity Data Analyst

Prepared for the May 23, 2024 meeting of the Seattle Planning Commission



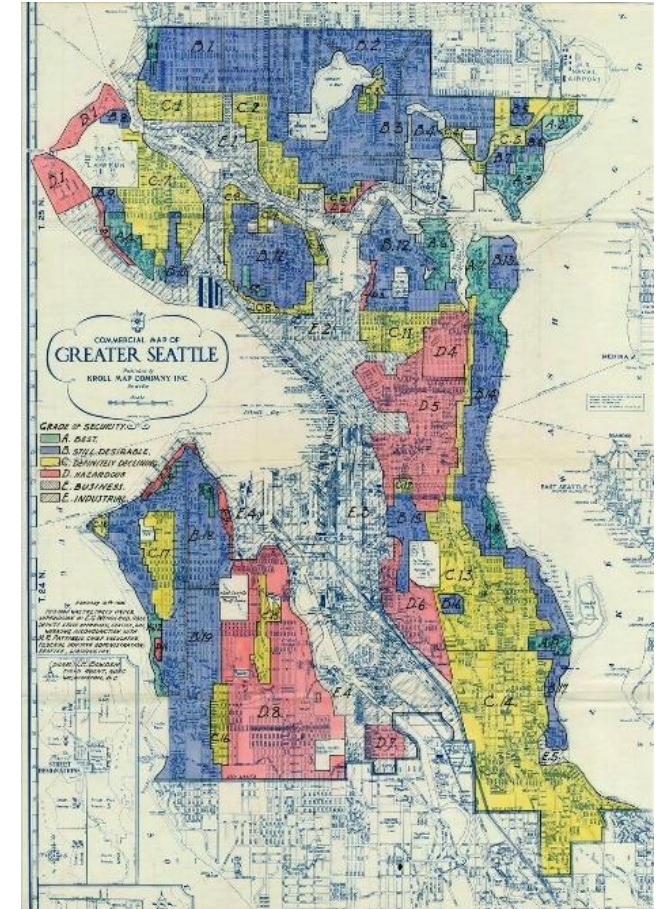
[Draft Housing Appendix](#)

Historical Context of Racist Housing and Land Use Practices

Provides historical lookback at housing law and policies that have had racially disparate impacts in Seattle, including:

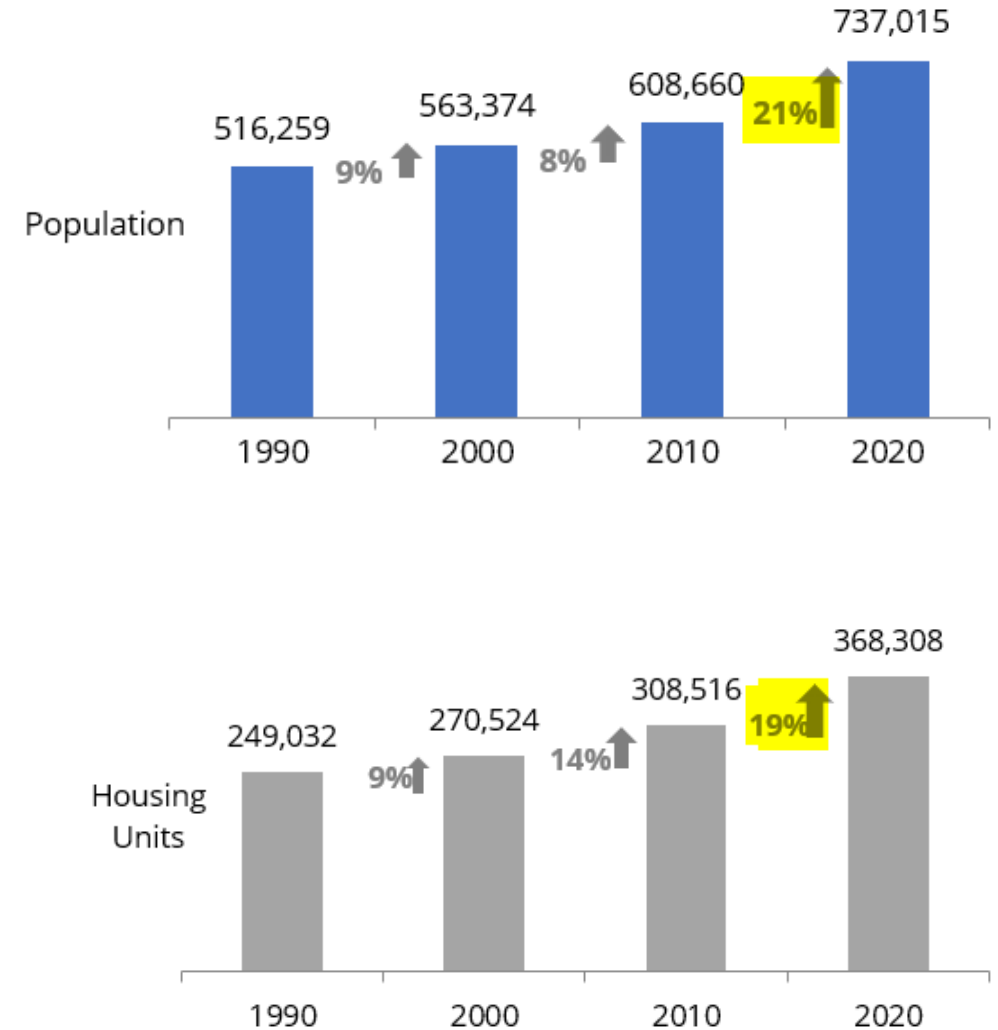
- federal,
- state,
- local
- and private.

Accompanies sections that look at ongoing disparities, woven in throughout the Housing Appendix



Recent growth, in a nutshell

- Between 2010 and 2020.
 - Seattle's population grew by 21 percent; more than double the population growth rate in Seattle during the two preceding decades.
 - While Seattle added housing at a rapid pace, housing construction did not keep up with the pace of population or job growth.



Source: Decennial census counts, U.S. Census Bureau.

Age Patterns and Trends

- Children (<18) are an especially low share of our city's residents.
 - 14% in Seattle compared to 23% in remainder of King County.
 - Among large cities, only San Francisco is more childless.
- Young adults (25-34) are an especially large and growing population in Seattle
 - 25% of Seattle's population compared to 15% in rest of King County
- Older adults (65+)
 - Roughly same share of residents in Seattle as in rest of King County (13% v. 14%).
 - Projected to grow by nearly 75% between 2022 and 2045

Source: ACS 2021 1-year estimates, U.S. Census Bureau. OFM population projections for population 65+.
Notes: ACS estimates based on a sample and carry margins of error.

Race/Ethnicity Patterns and Trends

- Seattle's population of color grew between 2010 and 2020.
 - Seattle's population of color grew at five times the rate of the city's white population growth
- Trends vary for individual groups of color. From 2010 to 2020:
 - Multiracial, Asian, and Hispanic/Latino populations grew fastest.
 - Seattle's Black population grew very slowly
 - Number of Native American residents and Pacific Islander residents declined.

Racial and Ethnic Composition of Seattle Population		
	'10 to '20 Growth	2020 Population
Total population	21%	737,015
People of Color	46%	298,847
Black	7%	50,234
Native American	-16%	3,268
Asian	49%	124,696
Pacific Islander	-14%	1,941
Another race	205%	4,473
Two or more races	102%	53,672
Hispanic/Latino, of any race	50%	60,563
White	9%	438,168

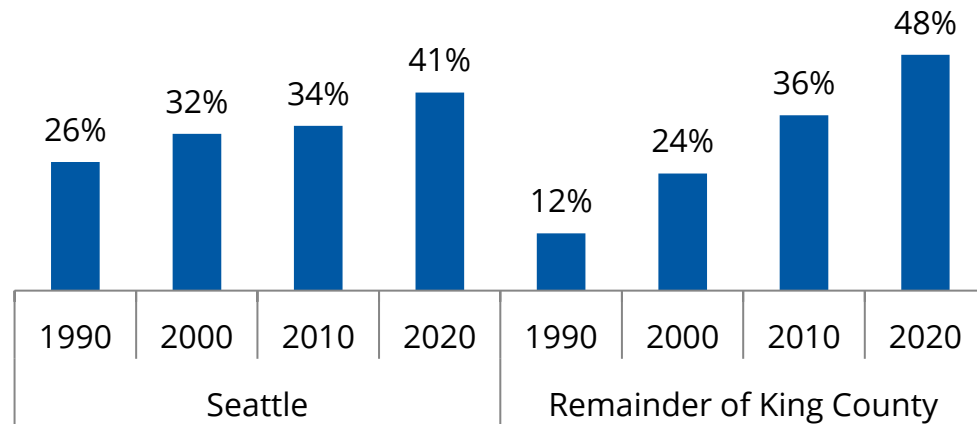
Source: Decennial census counts, U.S. Census Bureau.

Trends in People of Color As % of Population

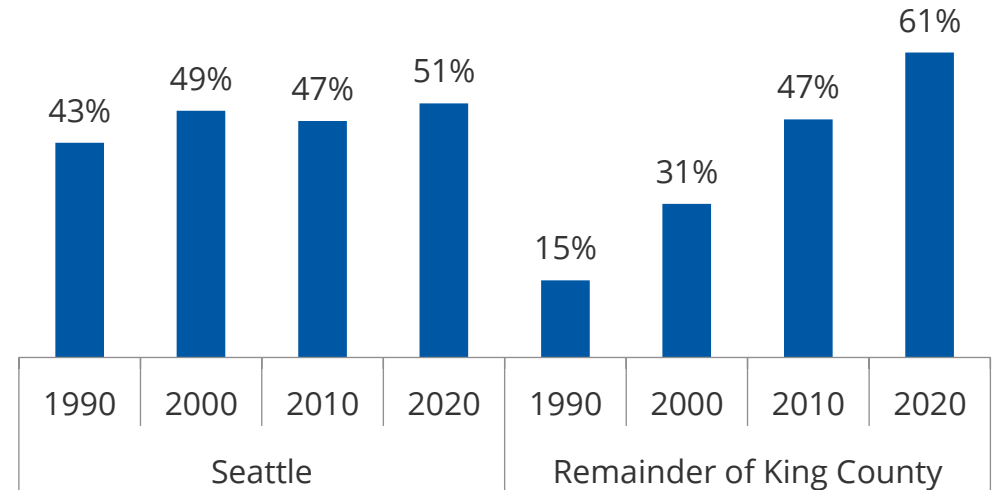
The population of color has risen much faster in the rest of King County than in Seattle.

This is especially true for *children of color*.

**Persons of Color
As Share of Total Population**



**Children of Color As Share of
Population Under 18 Years of Age**



Household Types and Sizes

Household Types and Sizes in Seattle, 2020	
TOTAL HOUSEHOLDS	345,627
HOUSEHOLD TYPE	
Family households	43.0%
Cohabiting couples	9.2%
Roommate households	7.0%
Householder living alone	40.8%

Family and couple households

Household Types and Sizes

Household Types and Sizes in Seattle, 2020	
PRESENCE OF CHILDREN AND OLDER ADULTS	
With one or more people under 18	17.9%
With one or more people 65 years and over:	19.1%
Householder 65 years and over living alone	8.9%
HOUSEHOLD SIZE	
1 person	40.8%
2 persons	34.8%
3 persons	11.6%
4 persons	8.6%
5 or more persons	4.2%
AVE. NUMBER OF PERSONS PER HOUSEHOLD	2.05

Source: U.S. Census Bureau 2020 Census

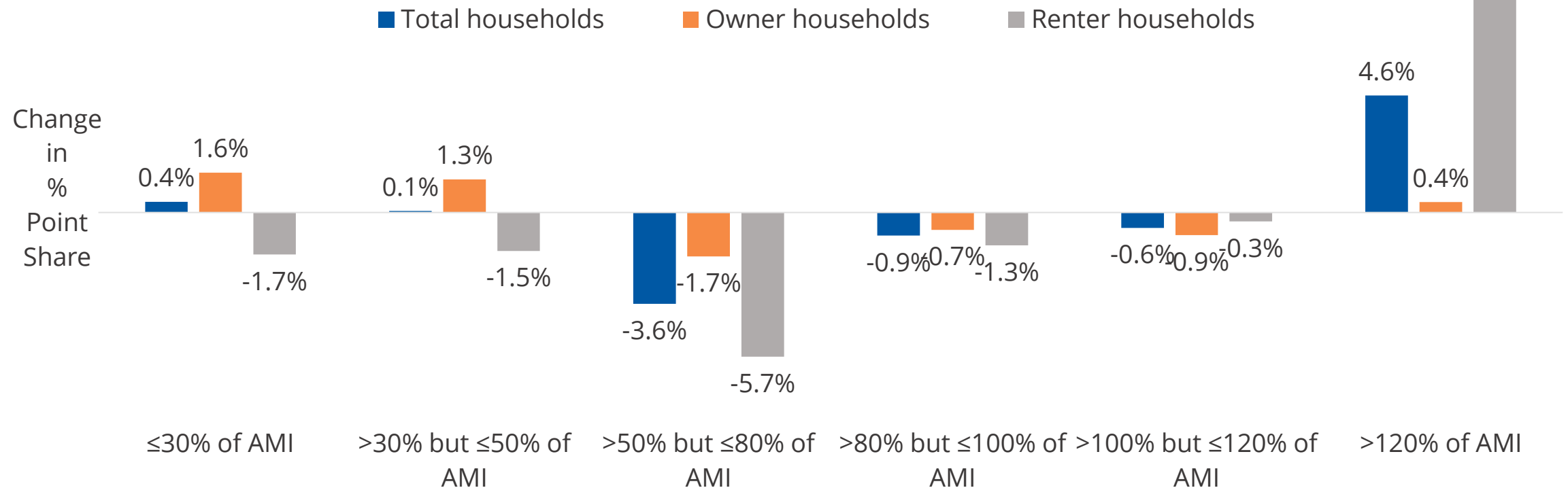
Household Types and Sizes

Household Types and Sizes in Seattle, 2020	
PRESENCE OF CHILDREN AND OLDER ADULTS	
With one or more people under 18	17.9%
With one or more people 65 years and over:	19.1%
Householder 65 years and over living alone	8.9%
HOUSEHOLD SIZE	
1 person	40.8%
2 persons	34.8%
3 persons	11.6%
4 persons	8.6%
5 or more persons	4.2%
AVE. NUMBER OF PERSONS PER HOUSEHOLD	2.05

Compares to 2.66 in remainder of King County

Income Patterns and Trends

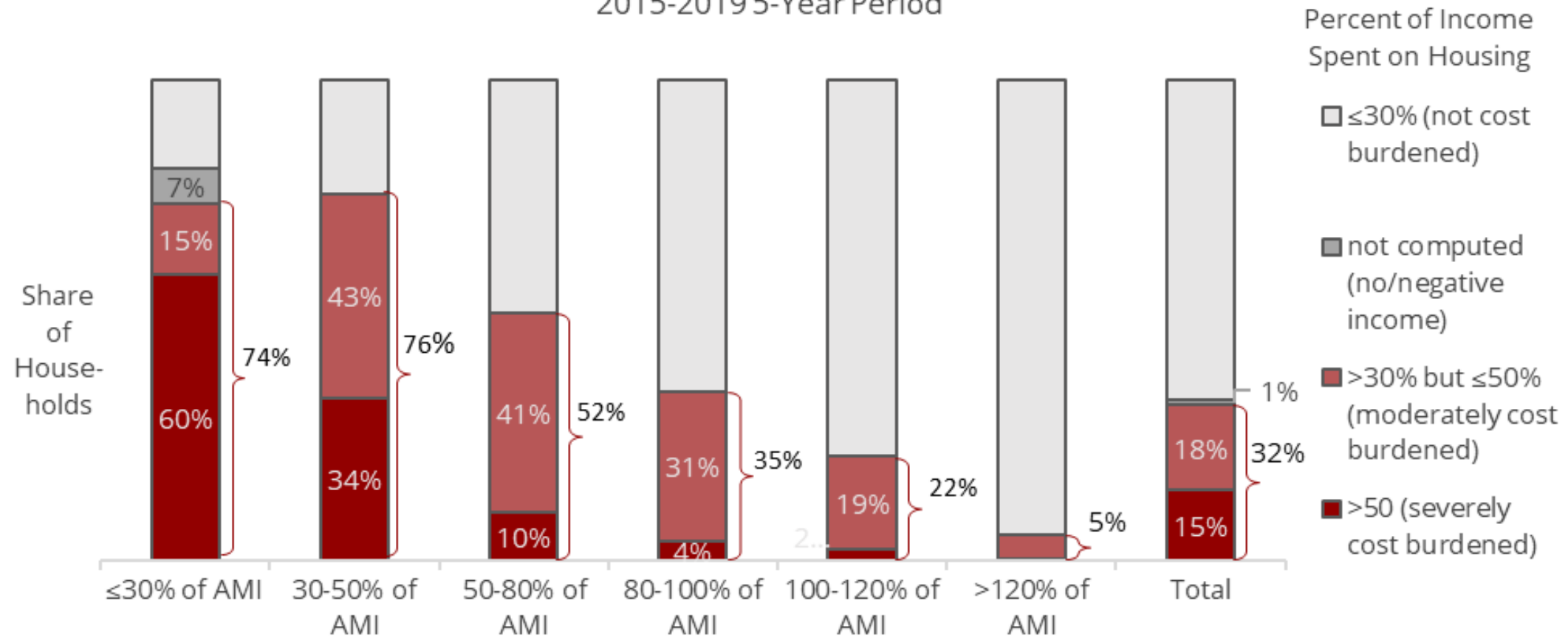
Change in Seattle Household Income Distribution
2010 5-Year Period to 2019 5-Year Period



Source: CHAS tabulations of 2006-2010 and 2015-2019 ACS 5-year estimates, U.S. Census Bureau and HUD..

Cost Burden by Household Income

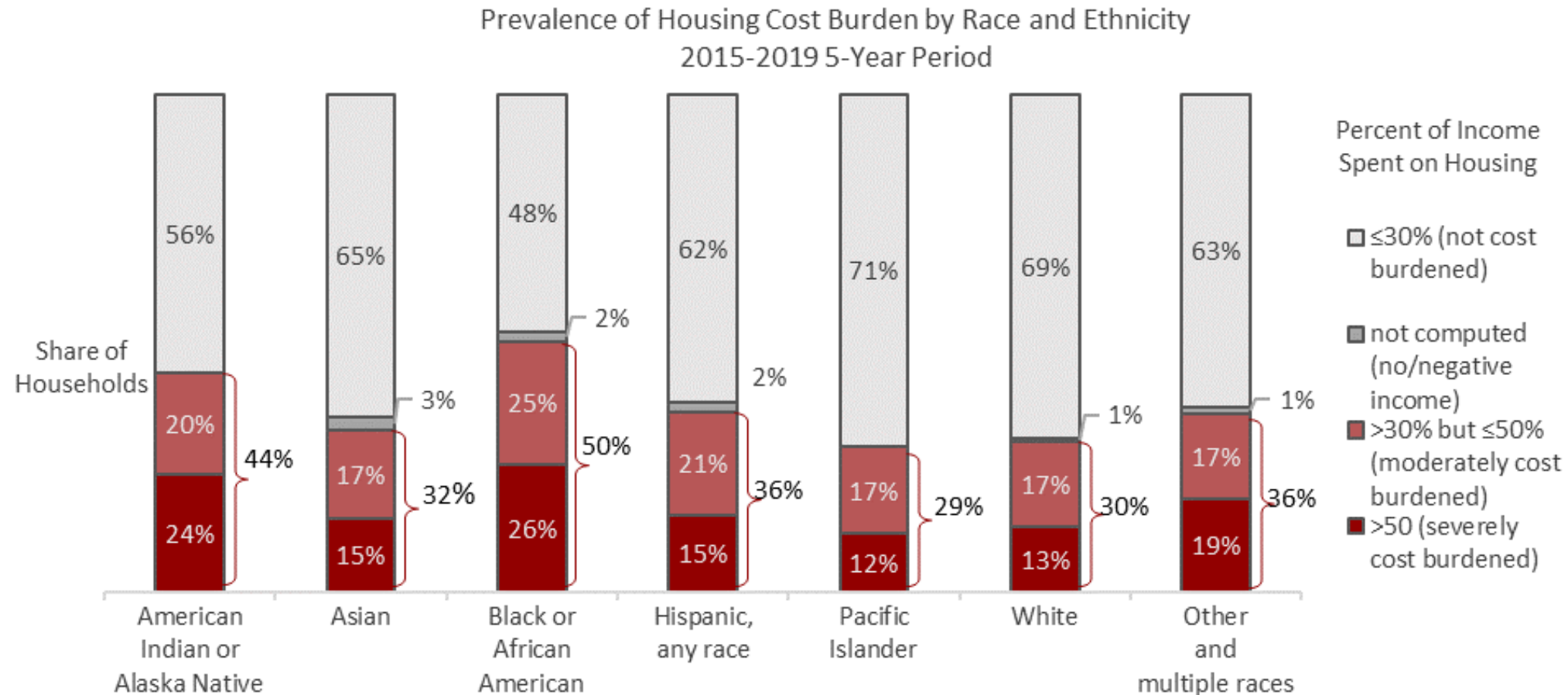
Prevalence of Housing Cost Burden by Household Income Category
2015-2019 5-Year Period



Source: CHAS tabulation of 2015-2019 ACS 5-year estimates, U.S. Census Bureau and HUD.

Notes: The Census Bureau and HUD do not calculate the percentage of income spent on housing for households with zero or negative income.

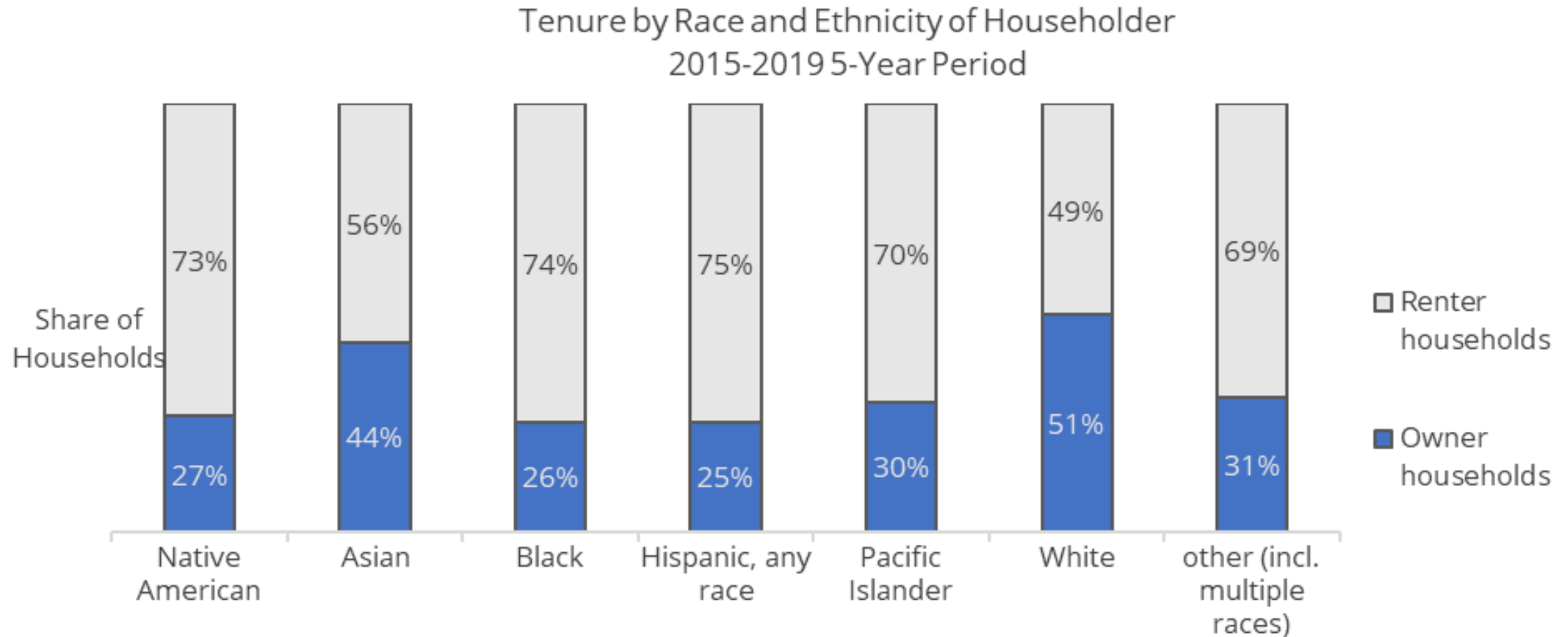
Racial & Ethnic Disparities: Cost Burden



Source: CHAS tabulation of 2015-2019 ACS 5-year estimates, U.S. Census Bureau and HUD.

Notes: ACS estimates are based on a sample and may be unreliable for small demographic groups including Native Americans and Pacific Islanders. See previous figure for additional notes.

Racial & Ethnic Disparities: Home Ownership



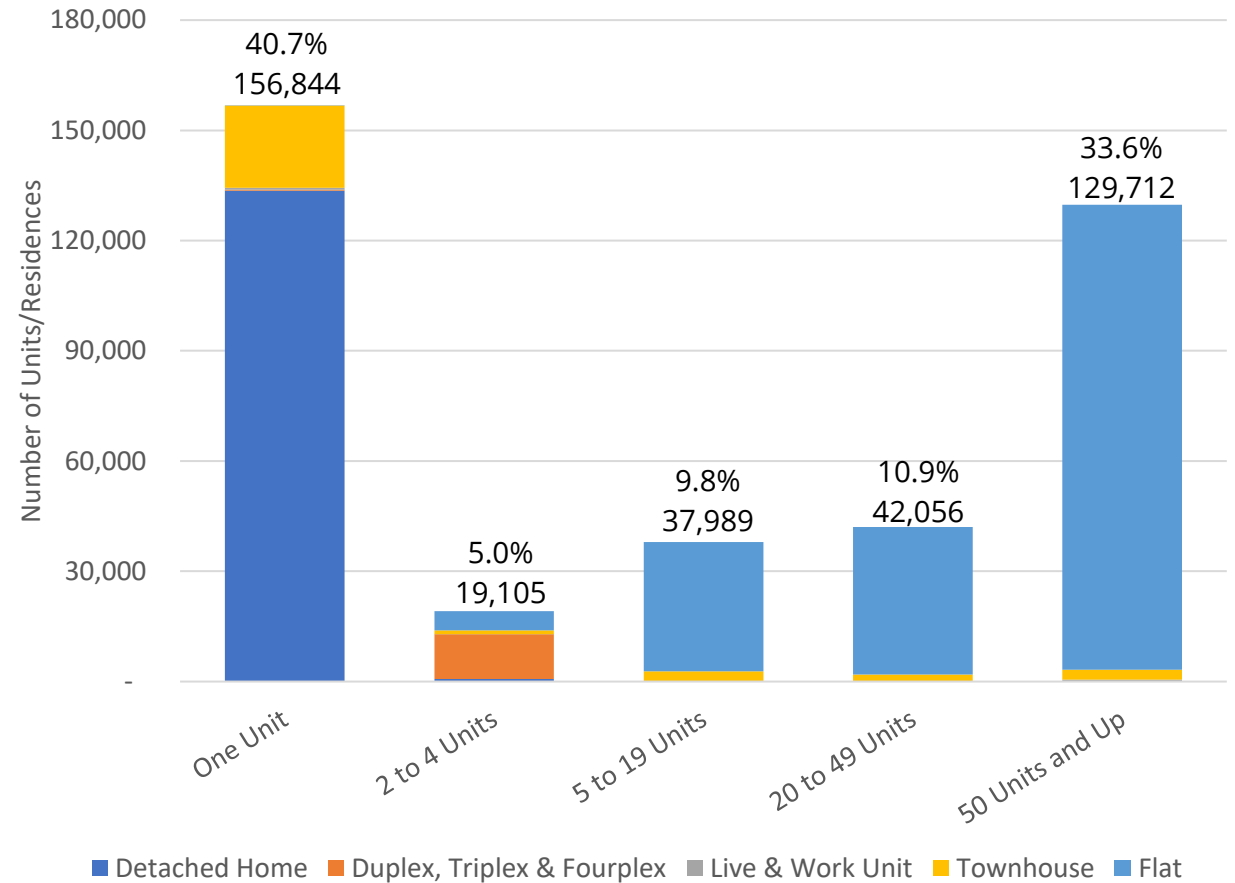
Source: CHAS tabulation of 2015-2019 ACS 5-year estimates, U.S. Census Bureau and HUD.

Notes: ACS estimates are based on a sample and may be unreliable for small demographic groups including Native Americans and Pacific Islanders. See previous figure for additional notes.

Existing Housing Supply

- Single-unit homes account for just above 40 percent of the total housing supply. Buildings with 50 or more units have approximately a third of the housing supply in approximately 1,050 buildings
- Three-quarters of existing flats are 0- and 1-bedroom units. Townhomes tend to have 2 to 3 bedrooms, while a majority of 3+ bedroom units are detached homes.

Seattle's Housing Supply by Building Size

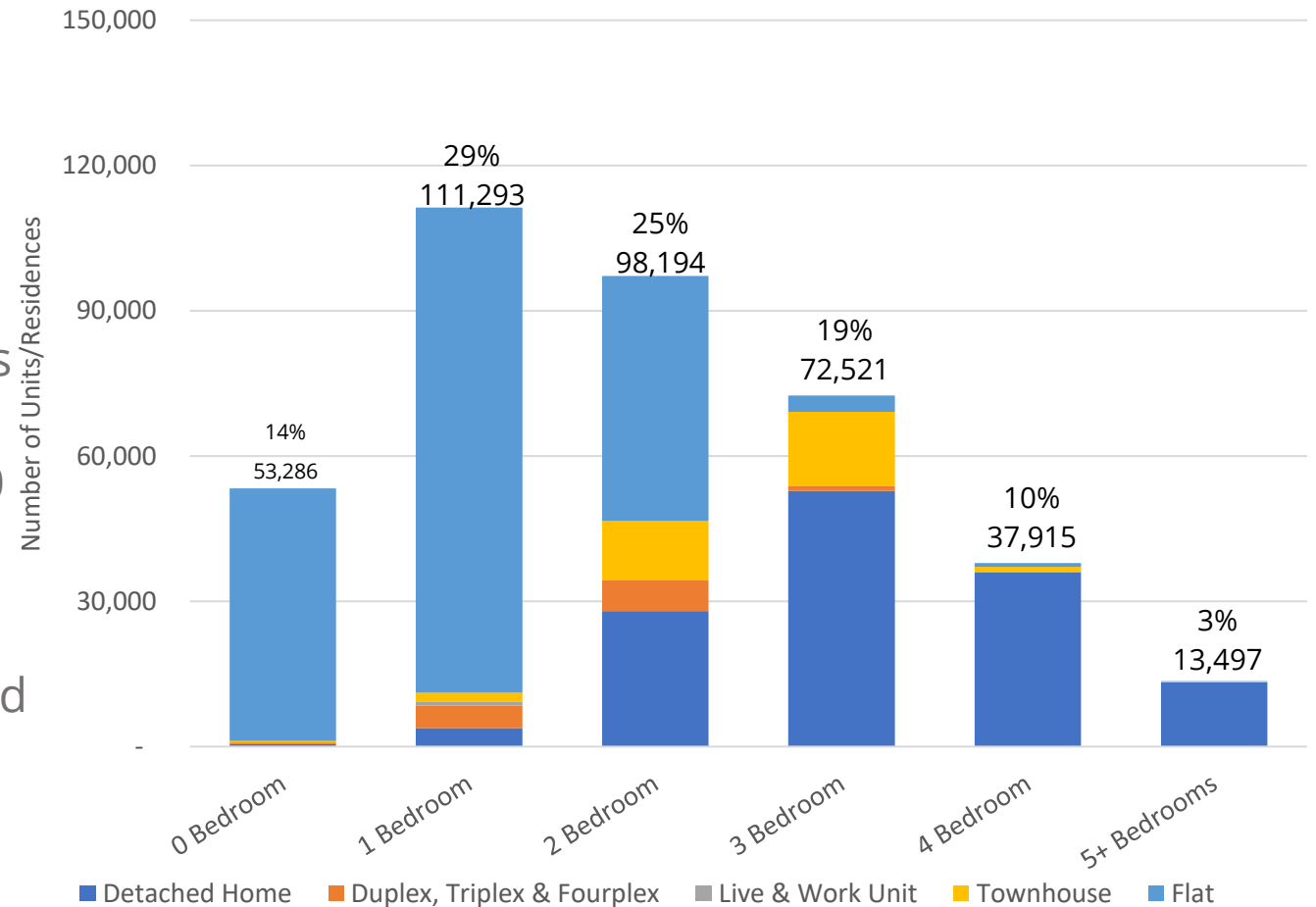


Source: King County Department of Assessments, compiled by City of Seattle, July 2022

Existing Housing Supply

- Single-unit homes account for just above 40 percent of the total housing supply. Buildings with 50 or more units have approximately a third of the housing supply in approximately 1,050 buildings
- Three-quarters of existing flats are 0- and 1-bedroom units. Townhomes tend to have 2 to 3 bedrooms, while a majority of 3+ bedroom units are detached homes.

Seattle's Existing Housing Supply by Number of Bedrooms



Source: King County Department of Assessments, compiled by City of Seattle, July 2022.

Note: AADUs, DADUs, and Principal Units are wrapped into "Detached Home" and "Townhouses" in the Assessors data

Development Since Last Comprehensive Plan Update (2015)

- Strong overall production.
- From 2016 through 2022, had a net addition of 58,328 units.
- New construction types.
- Seattle gained a net 1,100 new DADUs and 1,000 AADUs, while just 1,500 net new detached homes were finished.
- Small units in big buildings.
- Two-thirds of units built since 2016 were 0- or 1-bedroom units, nearly all of which were flats.
- Over 70 percent of new units were in buildings with 50 or more units.

Housing Development by Housing Type			
January 2016 – December 2022			
Unit Type	New Units Finished	Demolitions	Net New Units
Total Units:	62,739	4,411	58,328
Multifamily	11,705	1,490	10,215
Mixed-use	44,854	257	44,597
Detached	3,999	2,518	1,481
DADU	1,102	17	1,085
AADU	1,071	24	1,047
Institutional, industrial, or other	8	105	(97)

Source: City of Seattle Quarterly Housing Report Dashboard as of April 10, 2023

Ownership Housing Market

The Zillow Home Value Index showed that lower-cost homes **tripled in value from 2012 to 2022**

- Ownership housing that is not income-restricted is rarely affordable to households at or below 120% of AMI.
- While the cost of ownership housing is prohibitive to most Seattle households today, it is more prohibitive to households of color than it is proportionately to white households.

Income as a Percent of AMI Necessary to Afford Monthly Cost of Homes						
Unit Type	With a 20% Downpayment			With a 5% Downpayment		
	All Units	Less than 10 Years Old	Over 30 Years Old	All Units	Less than 10 Years Old	Over 30 Years Old
Fee Simple Ownership						
Detached Home	164%	236%	153%	214%	308%	200%
Townhouse	131%	134%	147%	169%	173%	190%
Condominium Ownership						
Accessory Dwelling Unit	142%	142%	-	183%	183%	-
Principal Dwelling Unit	194%	193%	-	251%	251%	-
Multifamily Unit	119%	163%	112%	152%	208%	142%

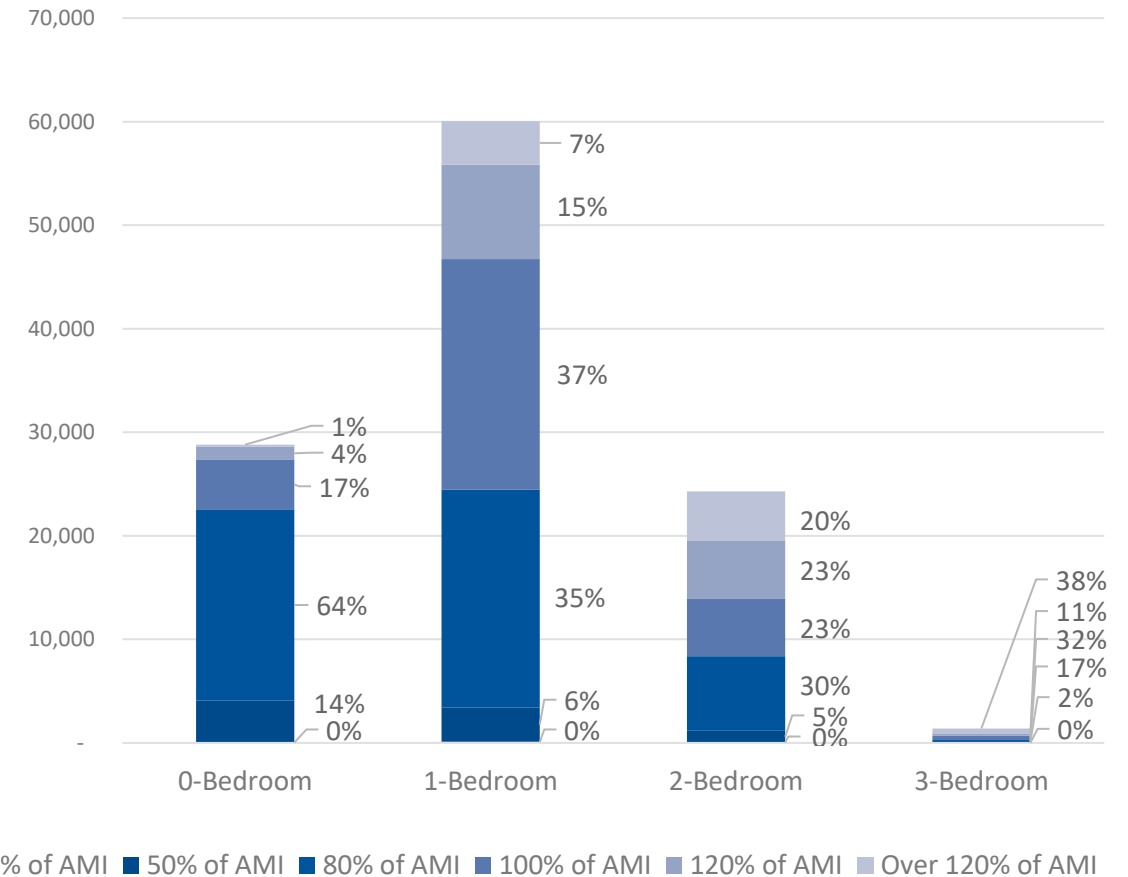
Source: King County Recorded Sales, prepared by OPCD as of February 2022; HUD 2022 AMI.
Notes: Income necessary to afford each unit is a weighted average of bedroom-adjusted AMI using 1 person for a 0-bedroom unit, and 1.5 persons per bedroom thereafter.

Rental Housing Market

Median monthly gross rents in Seattle grew 81% (+\$797) from \$990 in 2010 to \$1,787 in 2021 (ACS).

- Renters of 1-unit homes pay a large premium to live in larger units in neighborhoods that fit their needs
- Less than half of Seattle households can reasonably afford the median gross rent of a 1-bedroom unit. An even smaller share of BIPOC families can afford units due to racial income disparities.
- Older apartments provide a critical supply of units affordable to households at or below 80% of AMI. Newer apartments vary in affordability by number of bedrooms with multi-bedroom apartments being largely unaffordable.

Apartments Affordable to AMI brackets by Number of Bedrooms



Source: CoStar Group, www.costar.com; ACS 5-Year PUMS 2017-2021

Note: Median gross apartment rents are calculated using CoStar Effective Rents for apartments described in the Housing Appendix and PUMS estimates of tenant-paid utilities by the number of bedrooms.

Unable to Afford Average Rent for a Studio

Worker(s) in Household	Average Annual Wage Paid in Seattle
Min-Wage Worker (w/large employer)	\$35,922
Housekeeping Cleaner	\$38,490
Baker	\$40,660
Childcare Worker	\$41,551
Groundskeeper	\$48,920
Waitperson (part-time) and Bank Teller (part-time)	\$51,475
Medical Assistant	\$56,895

Studio Apartment	
Average monthly rent	\$1,463
Annual earnings needed to afford	\$58,520

Source and notes:

- CoStar average effective rents in Seattle, Q2 2022.
- Metro area wages from BLS, May 2022; adjusted upward for occupational categories paying more in Seattle. Affordability requires spending no more than 30% of income on rent.

Unable to Afford Average Rent for a 1-BR Apt

All of the above, and...

Worker(s) in Household	Average Annual Wage Paid in Seattle
Construction Worker	\$59,676
Administrative Assistant	\$59,686
Bus Driver	\$68,910
Family Social Worker	\$74,122
Two full-time minimum-wage workers	\$71,843
Assembly Worker (full time) and Medical Assistant (part-time)	\$74,878

1-Bedroom Apartment	
Average monthly rent	\$2,006
Annual earnings needed to afford	\$80,240

Source and notes:

- CoStar average effective rents in Seattle, Q2 2022.
- Metro area wages from BLS, May 2022; adjusted upward for occupational categories paying more in Seattle. Affordability requires spending no more than 30% of income on rent.

Unable to Afford Average Rent for a 2-BR Apt

All of the above, and...

Worker(s) in Household	Average Annual Wage Paid in Seattle
Firefighter	\$84,270
Admin Assistant (full-time) and Hairdresser (part-time)	\$85,934
Elementary School Teacher	\$92,296
Electrician	\$92,521
Environmental Scientist	\$98,510
Community Service Manager	\$107,871

2-Bedroom Apartment	
Average monthly rent	\$2,701
Annual earnings needed to afford	\$108,040

Source and notes:

- CoStar average effective rents in Seattle, Q2 2022.
- Metro area wages from BLS, May 2022; adjusted upward for occupational categories paying more in Seattle. Affordability requires spending no more than 30% of income on rent.

Barriers to Housing Development at all Income Levels

The Land Capacity Analysis concluded that Seattle currently has sufficient zoned development capacity to accommodate the projected housing needs allocated to the City through 2044.

Capacity alone is insufficient to address our housing needs and goals moving forward. We provide review and analysis in several sections of the Housing Appendix:

Housing Production Barriers and Actions

Barriers

- Restrictive Zoning
- Development Standards
- Permitting Times
- Cost and Financing

Actions

- Zoning reform, NR responsive to HB 1110
- Modified development standards
- Simplify, streamline, accelerate permitting

Income-Restricted Housing

Income-Restricted Housing Supply

City Investments in Permanently Affordable Housing

Income-Restricted Units in Market Rate Multifamily Buildings

Funding for Production & Preservation:
Cumulative gap of \$30.4B through 2044, incl. Capital and Operations & Maintenance

GROWTH AND DIVERSITY IN URBAN CENTERS AND URBAN VILLAGES

- The City's Urban Centers and Urban Villages (UCUVs) experienced rapid population growth from 2010 to 2020
- By 2020, half of Seattle's residents of color lived in UCUVs, disproportionately higher than White non-Hispanic residents
- While this section shows net change in population of all UCUVs, it does not show:
 - Differentiation between regions and racial groups in the city (*Changes in the Racial & Ethnic Makeup of Seattle Neighborhoods*)
 - Where displacement is happening, esp. low-income people of color (*Displacement*)
 - Disaggregated demographic, housing data at the Center level (*forthcoming Centers Profiles*)

Distribution of Population and Housing Units: Inside and Outside of Urban Centers and Urban Villages								
	Population						Housing	
	People of Color		White		Total		Number of Units	Percent of Units
	Number	Percent	Number	Percent	Number	Percent		
2020								
Inside UCUVs	149,369	50%	158,938	36%	308,307	42%	181,810	49%
Outside UCUVs	149,478	50%	279,230	64%	428,708	58%	186,498	51%
Total	298,847	100%	438,168	100%	737,015	100%	368,308	100%
2010								
Inside UCUVs	91,785	45%	129,241	32%	221,026	36%	130,400	42%
Outside UCUVs	113,297	55%	274,337	68%	387,634	64%	178,116	58%
Total	205,082	100%	403,578	100%	608,660	100%	308,516	100%
Source: 2010 and 2020 decennial Census estimates, U.S. Census Bureau; City of Seattle Office of Planning and Community Development.								

Equitable Development Community Indicators

HOME

- Homeownership
- Housing cost burdens
- Affordability and availability of rental housing
- Family-size rental housing
- Rent- and income-restricted housing

COMMUNITY

- Proximity to community centers
- Access to public libraries
- Proximity to grocery stores
- Access to parks and open space (to be included in next report)
- Air pollution exposure risk

TRANSPORTATION

- Sidewalk coverage
- Access to frequent transit with night and weekend service
- Jobs accessible by transit
- Average commute time

EDUCATION AND ECONOMIC OPPORTUNITY

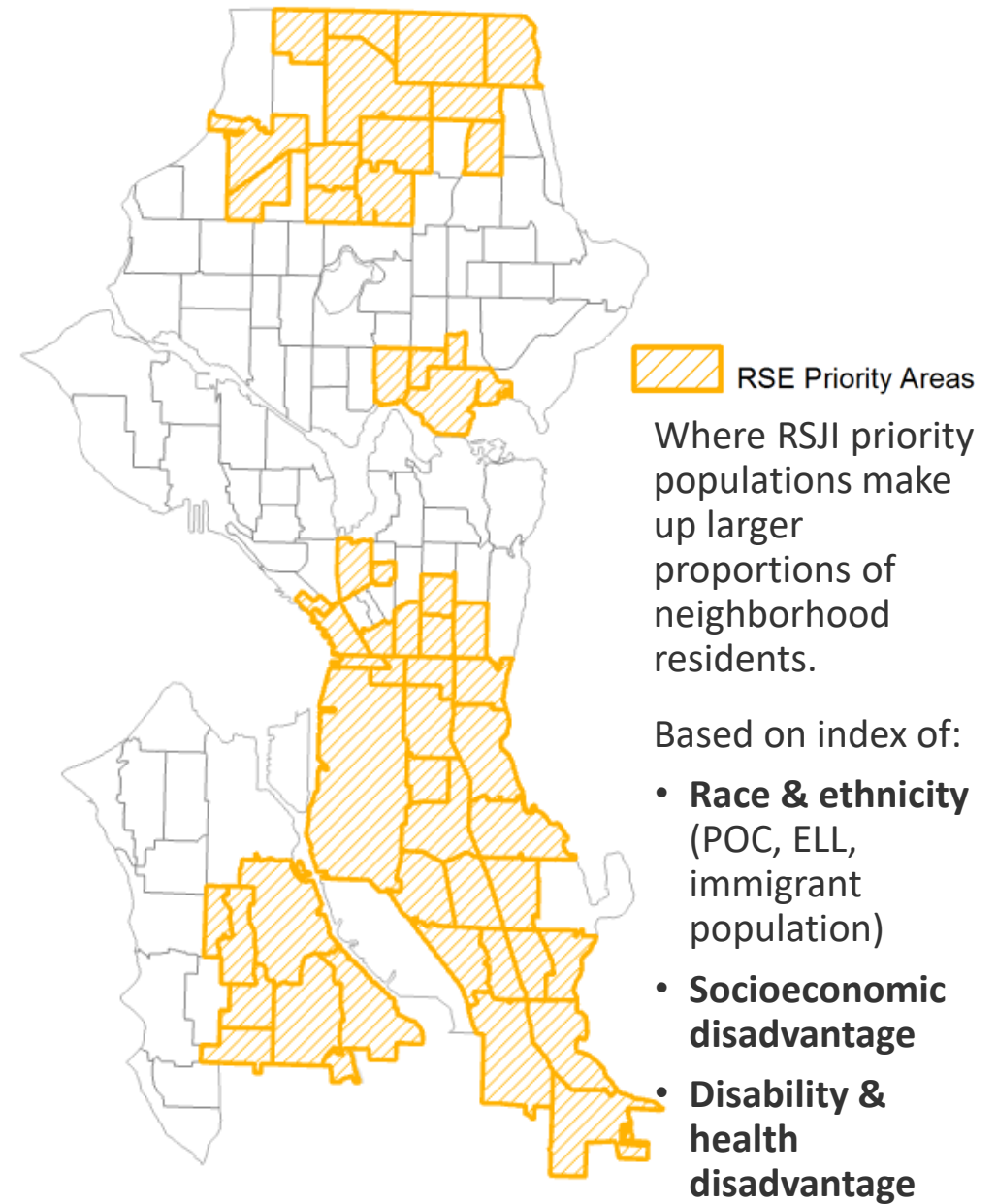
- Performance of neighborhood elementary schools
- Unemployment
- Disconnected youth
- Educational attainment
- Poverty and near-poverty
- Full-time workers in or near poverty
- Business ownership



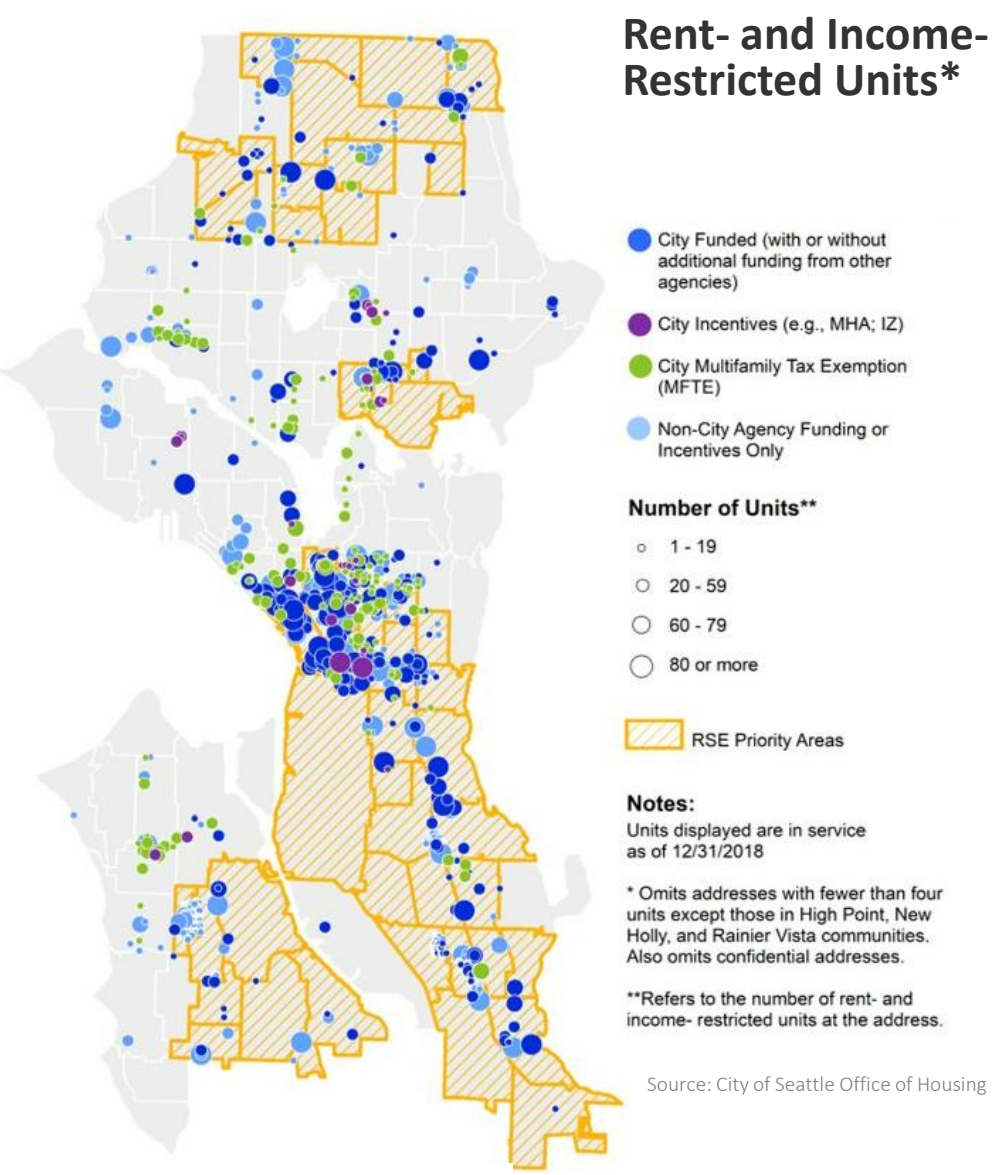
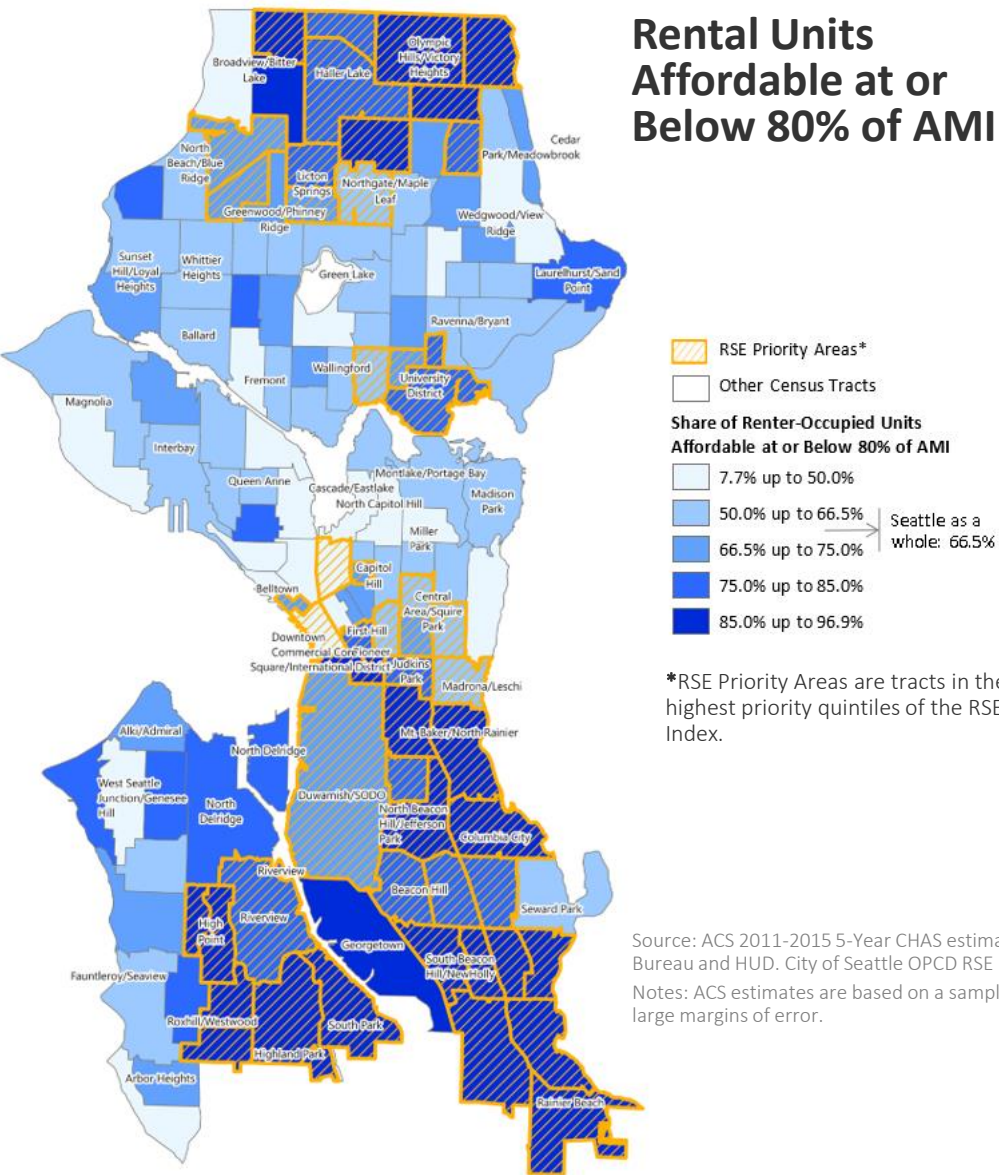
Analysis of Community Indicators

- **Racial and ethnic disparities** in city as a whole
- **Neighborhood-based disparities**; focus on priority areas identified in the City's [Race and Social Equity \(RSE\) Index](#).

First report provides pre-pandemic baseline.



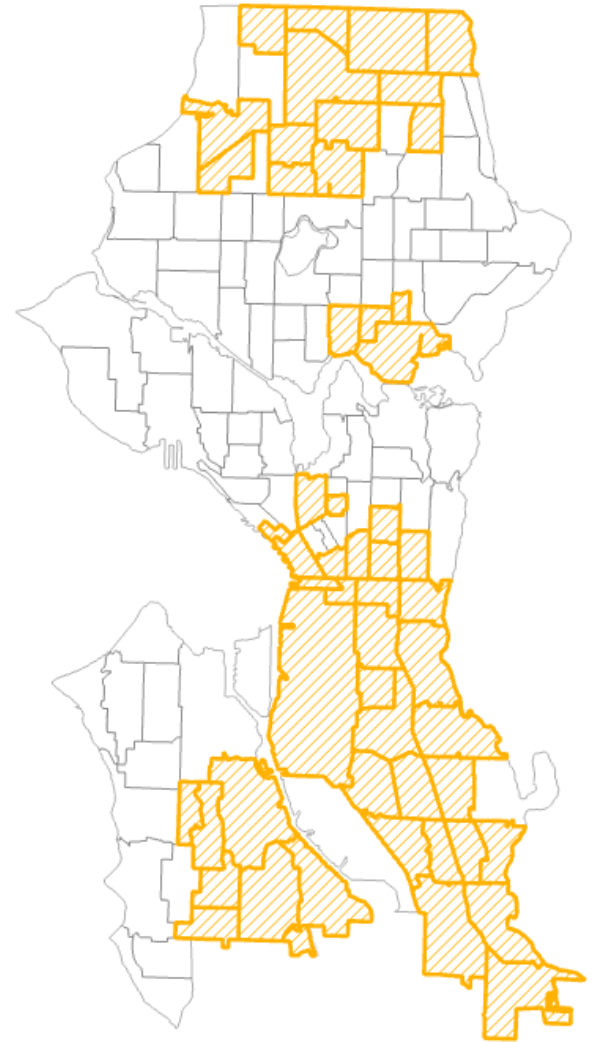
Concentrations of Housing That's Affordable with a Low Income



A few key findings on the community indicators

RSE Priority Areas:

- Have as good or somewhat better geographic access to:
 - frequent transit service
 - jobs accessible via transit
 - City-owned community centers and libraries although equal access does not imply equitable access.
- Face disproportionately high risk of **exposure to pollution**
- Are less likely to include **neighborhood elementary schools** scoring high on quality.
- Are among the areas w/greatest need for **parks and open space** (see [Outside Citywide](#))
- Include areas that lack access to **grocery stores** selling produce



Community Indicators part of broader suite of monitoring reports

Community Indicators

21 indicators (housing, community livability, transportation, and economic opportunity)



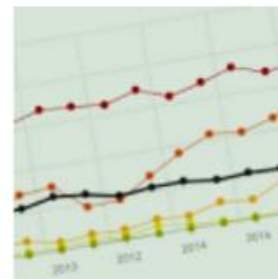
Displacement Risk Indicators

Indicators of heightened risk and displacement that's underway

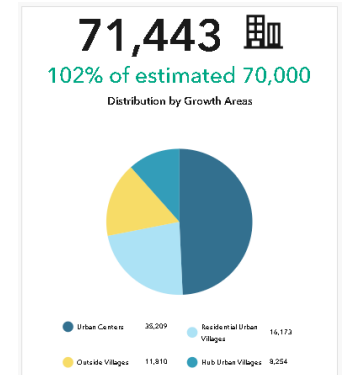


Neighborhood Change

Historical context and recent data on shifts in racial and ethnic demographics



Seattle 2035 Comp Plan Growth Monitoring



2018 Urban Village Monitoring Report



Questions for Planning Commissioners

As OPCD gears up to resume monitoring to gauge progress on advancing equity in implementation of the Comprehensive Plan:

- **What topics and metrics are most important to include in monitoring?**
- **What *geographies** and *place types in the growth strategy* do you recommend we include in monitoring?**

*in addition to RSE Priority Areas

