BURIEN

SOUTH KING COUNTY SUB-REGIONAL

HOUSING ACTION PLAN FRAMEWORK

2020



This document provides trends in demographic, employment, housing, and housing affordability along with housing projections for the City of Burien. Burien is a participant of the South King County Sub-regional cities who are coordinating a comprehensive Housing Action Plan Framework for South King County which includes the cities of:

- Auburn
- Burien
- Federal Way
- Kent
- Renton
- Tukwila

Given that the participating communities are impacted by many common market trends and demands, cooperation is necessary to address these issues. Providing for the sub-regional coordination of Housing Action Plans through a common Framework will allow all the partners to address housing issues holistically and ensure housing-related burdens are not simply shifted around between cities.

The sub-region differs from East King County and Seattle, where housing markets and income levels significantly skew the Area Median Income as it relates to how affordability is defined, and therefore how successful south King County cities are in providing affordable housing for their communities. A sub-regional framework that captures broad factors impacting housing choice, cost burden, and existing conditions of housing stock in South King County will set the stage to evaluate and incorporate appropriate policies, tools and incentives for increasing residential capacity.

This document and analyses were produced by:

ECONorthwest
ECONOMICS • FINANCE • PLANNING

Executive Summary

› Burien needs 7,500 new housing units by 2044 to accomodate the 2044 King County growth targets (see page 7).

› Burien needs to produce about 300 new units per year to reach this goal (pg. 7). This is a higher increase over the 105 average annual units produced over the 2011-2019 timeframe (pg. 4).

› In the 2010-2019 timeframe, Burien produced 9.3 housing units for every 10 new households that formed in the city (pg. 4). This is higher than most other cities in the South King County subregion but still underproducing.

› Development has typically delivered around 60 units per year, but the annual average was pulled up when 177 units were delivered in 2015 and 416 units were delivered in 2018 (pg. 4).

› Average 2-bedroom rents increased 45%, while median sales prices increased 101% between 2013 and 2020 (pg. 6).

› Burien has the second highest home prices in the South King County subregion, just below Renton.

› Affordable homeownership options are limited with fewer than 5,700 units affordable to households earning less than 50% of AMI (pg. 6). The King County HUD AMI is $103,400 for a 4-person household, so 50% of AMI is about $51,700.

› During the 2012-2016 period, 75% of renters and 70% homeowners earning less than 30% of AMI were cost burdened, along with 20% of renters and 55% of homeowners earning between 30% and 50% of AMI (pg. 6).

› Burien has less than 1,000 units of regulated affordable housing for households earning less than 60% of AMI (pg. 6).

› Of the 7,500 new units needed by 2044, about 1,215 units should be affordable to households earning 0-30% of AMI and another 1,038 should be affordable to households earning 30%-50% of AMI, which will help ease cost burdening in the city (pg. 7).

› Burien also needs to develop new units that will be affordable to households earning 100% or more of AMI (pg. 7). These households may be renting less expensive housing, thereby removing access to less expensive housing for lower income households.

Housing Trends

20,793

Number of total housing units in 2018

Source: OFM, 2019

945

Number of housing units built since 2011

Source: OFM, 2019

105

New housing units built on average every year since 2011

Source: OFM, 2019

9.3

New housing units per every 10 new households

› *Between 2011-2019*

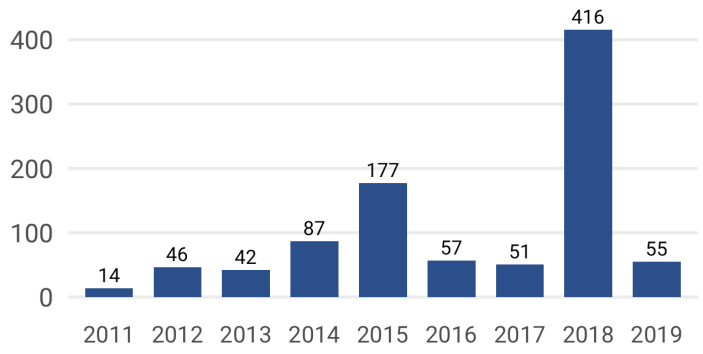
Source: OFM, 2019, ECONorthwest calculations

Housing Units Built by Decade, 1960-2020

Decade	% of Units
Before 1960's	45%
1960's	22%
1970's	8%
1980's	10%
1990's	6%
2000's	4%
2010's	5%

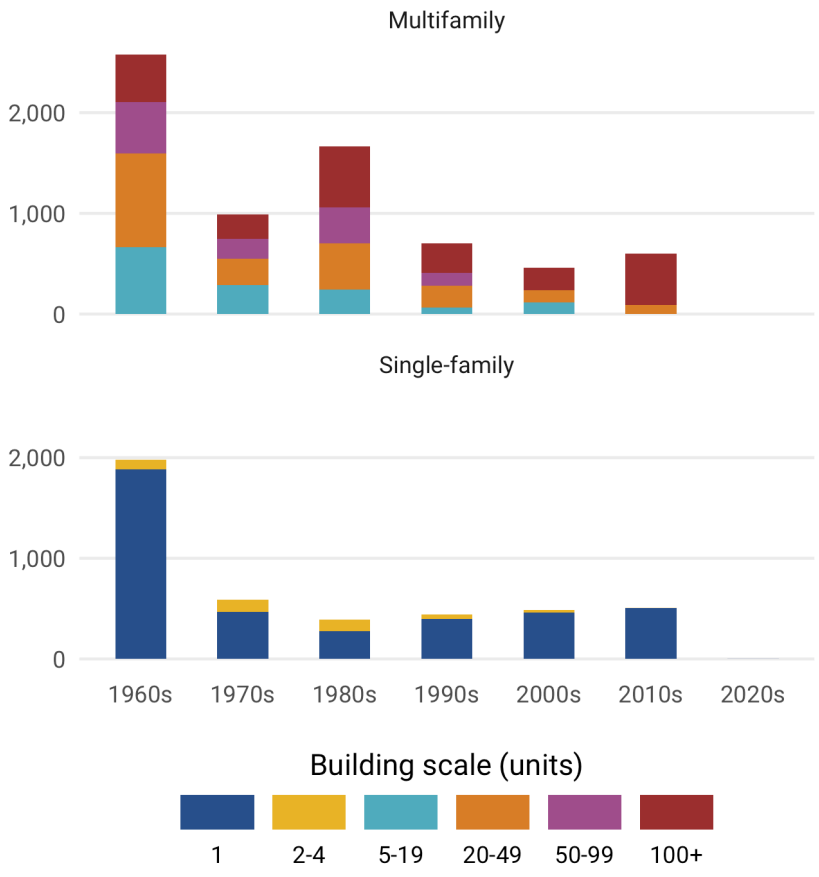
Source: King County Assessor's Office, 2020

Number of Units Built Per Year, 2011-2019



Source: OFM, 2019

Scale of Housing Built by Decade, 1960-2020



Source: King County Assessor's Office, 2020

Demographics

56%

Change in population

› *Between 2010 and 2018*

	2010	2018
Population	33,313	52,000

Source: OFM, 2019

6,921

Change in number of households

› *Between 2010 and 2019*

Source: OFM, 2019; ACS (5 year 2014-2018)

20%

Change in median household income

› *Between 2010 and 2018*

	2010	2018
Median Income	$51,995	$62,315

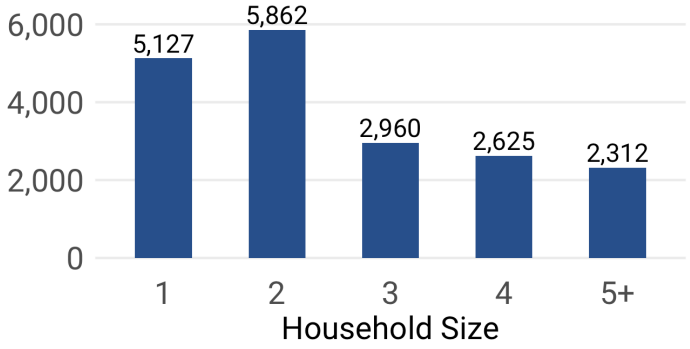
Source: U.S Decennial Census 2010; ACS (5 year 2014-2018)

King County 2018 Area Median Income (AMI) for a 4-person Household

AMI	South King County	King County
0-30%	18%	18%
30-50%	16%	15%
50-80%	23%	16%
80-100%	12%	11%
100%+	31%	40%

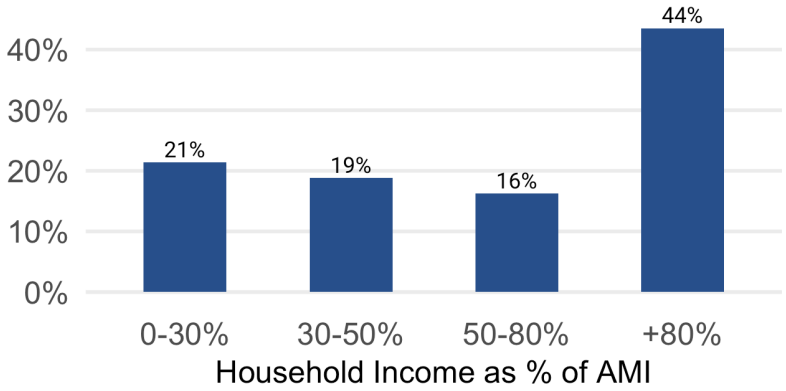
Source: HUD, 2018

Household Type, 2014-2018



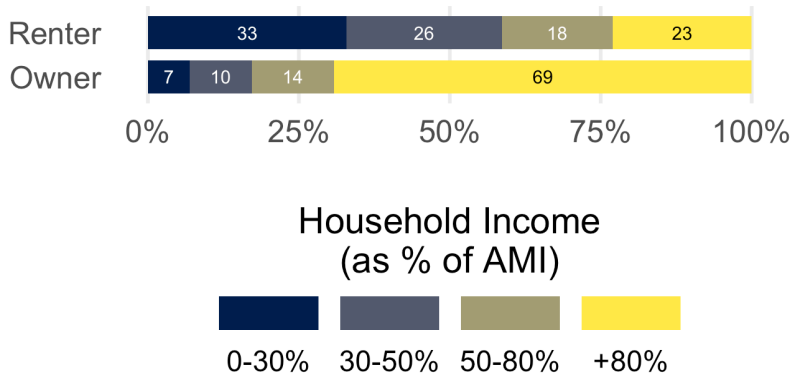
Source: ACS (5 year 2014-2018)

Income Distribution by AMI, 2012-2016



Source: CHAS (5 year 2012-2016)

Income Distribution by AMI and Tenure, 2014-2016



Source: CHAS (5 year 2012-2016)

Housing Affordability

Cost Burdened

› *A household who pays more than 30% of their income on housing (inclusive of households with severe cost burdening).*

Severely Cost Burdened

› *A household who pays more than 50% of their income on housing.*

996

Number of income restricted units

› *Total units as of 2020*

Source: ECONorthwest analysis of public affordable housing data

45%

Change in average rent for 2-bedroom apartment

› *Between 2013 and 2020*

	2013	2020
Average Rent	$999	$1,444

Source: Costar

101%

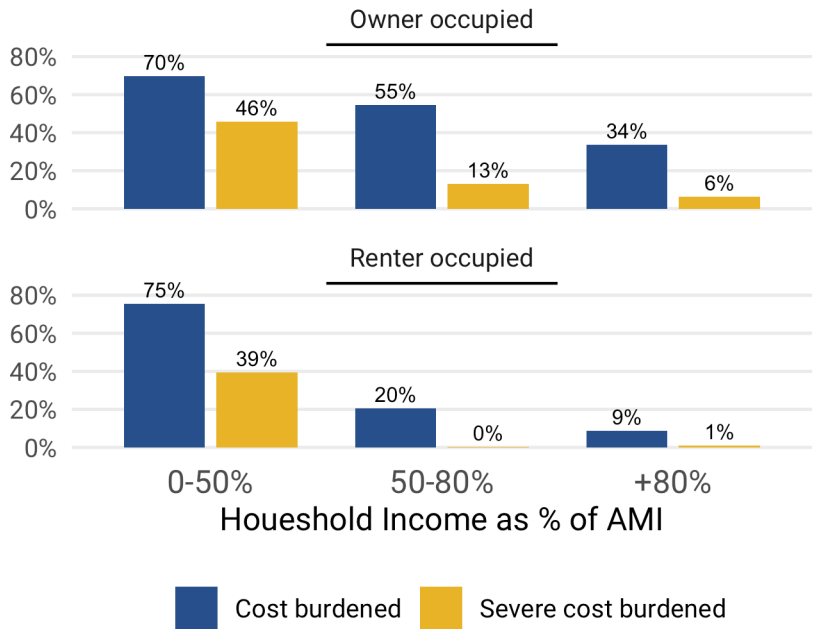
Change in median home sales price

› *Between 2013 and 2020*

	2013	2020
Median Sales Price	$233,450	$470,300

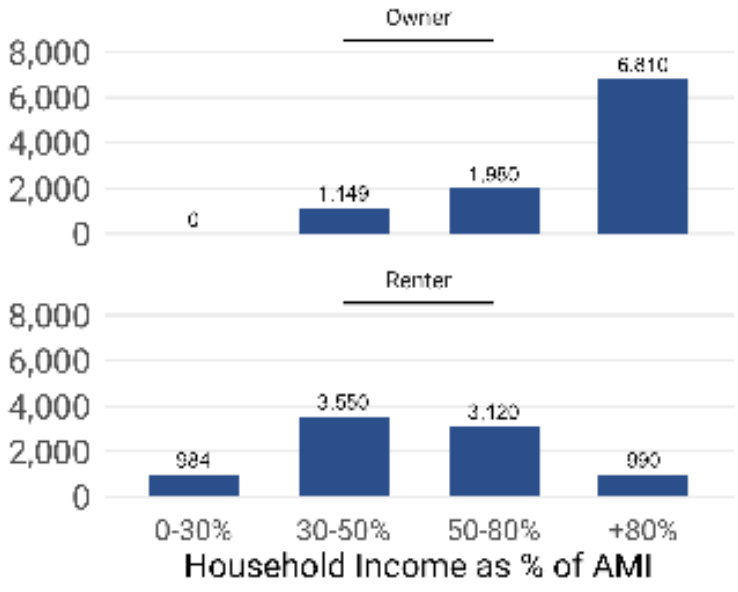
Source: Zillow

Cost Burdened and Severely Cost Burdened by Tenure, 2012-2016



Source: CHAS (5 year 2012-2016)

Housing Units Affordable by AMI and Tenure, 2012-2016



Source: CHAS (5 year 2012-2016)

Housing Need Forecast

7,500

Projected number of units needed by 2044

Source: King County 2021 Urban Growth Capacity Report

300

Average number of new units needed per year, 2019-2044

Source: King County 2021 Urban Growth Capacity Report

186%

Increase in annual housing production to reach 2044 housing need target

Source: OFM, 2019; King County 2021 Urban Growth Capacity Report; ECONorthwest Calculation

Housing Units Needed as a Share of Existing Stock

Existing Units	Housing Need	% of Existing Units
20,793	7,500	36%

Source: OFM, 2019; King County 2021 Urban Growth Capacity Report; ECONorthwest Calculation

Housing Units Needed by AMI, 2044

AMI	# of Units	% of Units
0-30%	1,215	16%
30-50%	1,038	14%
50-80%	1,444	19%
80-100%	977	13%
100%+	2,827	38%

Source: King County 2021 Urban Growth Capacity Report; PUMS, 2019; ECONorthwest Calculation

HUD Affordability Level by Housing Type, 2018

AMI	Studio	1-bed	2-bed
30%	$542	$582	$698
50%	$904	$970	$1,164
80%	$1,448	$1,552	$1,862
100%	$1,810	$1,938	$2,326

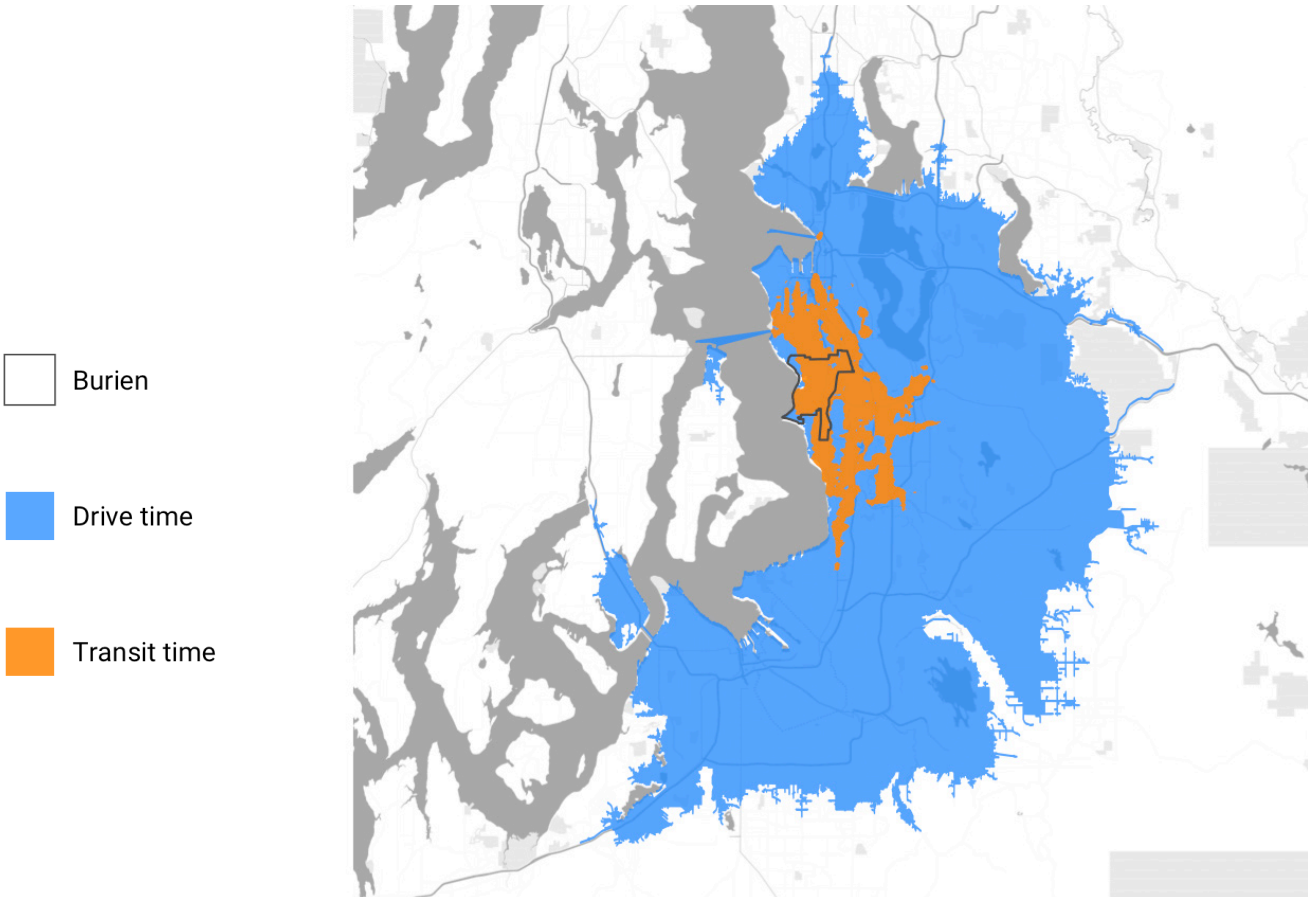
Source: HUD, 2018

Employment Profile

Burien Employment Numbers					Regional Access to Employment	
Industry (2-digit NAICS Code)	Employees (2018)	# Change (2008-2018)	% Change (2008-2018)	Median Salary (2018)	% Job by Auto	% Jobs by Transit
Agriculture, Forestry, Fishing and Hunting	2	1	100%	$36,477	41%	1%
Mining, Quarrying, and Oil and Gas Extraction	0	0	0%	$73,646	36%	4%
Utilities	0	0	0%	$78,563	59%	5%
Construction	257	-295	-53%	$54,412	58%	5%
Manufacturing	88	-66	-43%	$55,591	53%	8%
Wholesale Trade	183	-61	-25%	$48,182	75%	6%
Retail Trade	2,085	77	4%	$42,235	67%	4%
Transportation and Warehousing	274	237	641%	$49,005	87%	12%
Information	520	442	567%	$61,667	51%	1%
Finance and Insurance	189	-29	-13%	$39,940	71%	2%
Real Estate and Rental and Leasing	256	4	2%	$46,694	71%	5%
Professional, Scientific, and Technical Services	433	-64	-13%	$83,565	71%	3%
Management of Companies and Enterprises	73	11	18%	$61,071	87%	5%
Administrative and Support and Waste Management and Remediation services	328	141	75%	$40,082	68%	4%
Educational Services	1,398	247	21%	$46,719	64%	3%
Health Care and Social Assistance	3,477	16	0%	$48,906	67%	4%
Arts, Entertainment, and Recreation	281	0	0%	$31,938	60%	2%
Accommodation and Food Services	1,439	287	25%	$27,559	67%	6%
Other Service	572	-100	-15%	$36,765	68%	4%
Public Administration	470	3	1%	$57,730	64%	3%

Source: PSRC, ECONorthwest

Employment Profile



* Transit and drive time of 45 minutes, departing at 8:00 AM, midweek

Source: PSRC, ECONorthwest

Access to Employment*

These city-level employment estimates by 2-digit NAICS codes were derived using a combination of the U.S. Census Bureau's Longitudinal Employer-Household Dynamics (LEHD) Origin-Destination Employment Statistics (LODES) data, and Puget Sound Regional Council's Covered Employment Estimates. These employment estimates show the total number of residents working in each 2-digit NAICS sector in that city, the change in employment in that sector in that city since 2008, and the 2018 median wages for the residents in that city in that sector.

Transit and auto access to regional employment was derived using 45-minute travel sheds for each mode. We calculated the number of jobs available within these travel sheds in each 2-digit NAICS category for the four-county region (King, Pierce, Snohomish, and Kitsap).