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From: Adam Zack
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To: Comp Plan Update
Subject: FW: Recreational Housing Factor and the Land Capacity Analysis
Attachments: HNA Pop Growth006.pdf; Population growth004.pdf; HNA Bldg Permit Growth007.pdf

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Subject: Recreational Housing Factor and the Land Capacity Analysis

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All, please consider the following analysis of the Recreational home Factor:
The "Recreational Housing Factor" is, or should be, the factor applied to the LCA to account for the additional housing growth in the county in excess of strictly population growth. Looking at the 2017 Population projection technical memorandum of 4/11/17, we see that SJ County grew between 2000 and 2010 by 1692 souls or 828 families. (attachment Population Growth).
During the same period, the number of housing units increased by 3,561 according to the Housing Needs Analysis 12-17-19 or 2,020 (Attachment Building Permit growth Table 5-16). The ratio of homes built to population increase is either $3561/828 = 430\%$ or $2020/838=241\%$. Similarly, HNA Table 5-9 (pg 25, illustrates the excess of units built to population (families) with a ratio of $3,561/ 828$ families = 425%.
We are also able to calculate that ratio for the period 2010 to 2016 from the same sources where a population growth of $551/2.02=273$ families and housing growth of 828 shows a ratio of $828/273 = 303\%$. When we project the number of homes and land needed to accommodate projected growth, these are the numbers that are appropriate for the "Seasonal home Factor".
Currently CDP is proposing a Recreational home Facto of 35% which corresponds to an historic state, not the housing dynamic occurring for the past two decades.

1 Table 5-7. San Juan County Housing by Occupancy¹⁹.

	2000 Census	2010 Census	Change from 2000-2010	2015 ACS
Total housing units	9,752	13,313	+3561	13,619
Owner occupied	4,754	5,360	+606	5,507
Renter occupied	1,712	2,253	+541	2,201
Vacant housing units	3,286	5,700	+2414	5,911
Percentage of Total				
Owner occupied	48.75%	40.26%	-8.49%	40.44%
Renter occupied	17.56%	16.92%	-0.63%	16.16%
Vacant housing units	33.70%	42.82%	+9.12%	43.40%
Vacant Housing Unit by Type				
For seasonal, recreational, or occasional use	2,776	4,748	+1972	4,808
For sale only	82	187	+105	222
For rent	129	311	+182	214
Rented or sold, not occupied	63	57	-6	111
For migrant workers	0	5	+5	0
Other vacant	236	392	+156	556

2 Source: U.S. Census Bureau, 2000 Census, 2010 Census, 2011-2015 American Community Survey 5-Year Estimates

3
4 According to the US Census, 3,561 housing units were added to the County's housing stock between
5 2000 and 2010. During the same time, the number of vacant housing units increased by 2,414. By
6 2010, vacant housing made up 42.8 percent of total housing, up 9.1 percentage points from the year
7 2000.

8
9 Of vacant housing in 2010, 4,748 housing units were characterized as seasonal, recreational, or
10 occasional (SRO) use. In 2010, SRO uses made up 35.6 percent of the total housing stock, an increase
11 of nearly seven percentage points from the year 2000.

12
13 The 9.1 percent increase in vacant units from 2000 to 2010 may be partially attributable to the 2008
14 recession that affected the housing market. In the years between 2010 and 2015, the economy
15 began to rebound. Vacancy rates in the 2010 census and the 2015 ACS data sets are similar and
16 suggest that the rise in vacant units shown in the Census data between 2000 and 2010 may have
17 been linked with the recession.

18
19 The similar vacancy rate in the 2010 Census and the 2015 ACS data suggest that the early stages of
20 economic recovery following the recession did not reduce housing vacancy rates and SRO uses.
21 Housing remained vacant despite the rebounding market. Units used for SRO made up 81 percent
22 of vacant housing overall in the 2015 ACS data. The remaining 19 percent was vacant for more
23 temporary reasons such as recent sale, currently for sale, or unoccupied rental.
24

¹⁹ The Data in this table for 2015 was calculated by the ACS using annual surveys conducted during 2011-2015 and are representative of average characteristics during this period. Data from the ACS cannot be directly compared to Census data.

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fifteen percent higher than the OFM's 2015 annual estimate of 16,179. The inflated population projection had a direct impact on the size of the County's non-municipal UGAs.

2.B Historic Population Change:

The County experienced significant and prolonged population growth in the last third of the 20th Century. In the decade between 1970 and 1980, the County population almost doubled. The eighties and nineties saw strong and continuous population growth at a rate about half that of the seventies. While still increasing, the annual rate of population growth in the County between 2010 and 2016 was approximately eight percent of its 1970-1980 peak.

Table 4 and Figure 3 show that since 1970 net migration dwarfs natural increase as a component of population growth in the County.

The migration component of population change is more volatile than the natural component. Major economic, social or national changes can generate spurts and slowdowns in migration that are difficult to predict. Uncertainty about the pace and nature of economic recovery, property costs, and the availability of medical services may affect County migration trends in the future.

Table 4. San Juan County Population Change 1970-2016.

Decade	Initial Population	Net			Population Change	Final Population	Average Annual Growth
		Births	Deaths	Migration			
1970-1980	3,856	556	-536	3,962	3,982	7,838	7.4%
1980-1990	7,838	1,044	-742	1,895	2,197	10,035	2.51%
1990-2000	10,035	1,213	-1,178	4,007	4,042	14,077	3.47%
2000-2010	14,077	983	-1,192	1,901	2,884 1,692	15,769	1.15%
2010-2016	15,769	529	-823	845	551	16,320	0.58%

Source: OFM Annual Estimates.

828 DMT

15,769
14,077
1,692

15,769
14,077
1,692

16,320
15,769

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1 **Table 5-16. ESD Permit Data 1980-2016 Continued.**

Housing Permits									
year	1989	1990	1991	1992	1993	1994	1995	1996	1997
Total Units	238	360	288	288	453	255	287	384	443
Single-Family Units	217	299	271	263	406	208	261	332	425
Multi-Family Units	21	61	17	25	47	47	26	52	18
Units in 2-unit Multi-Family Structures	6	20	4	0	0	0	0	0	0
Units in 3- and 4-unit Multi-Family Structures	6	0	0	0	0	0	0	0	0
Units in 5+ Unit Multi-Family Structures	9	41	13	25	47	47	26	52	18

2

Housing Permits									
year	1998	1999	2000	2001	2002	2003	2004	2005	2006
Total Units	277	311	392	171	168	180	190	212	191
Single-Family Units	275	311	368	171	161	178	172	204	189
Multi-Family Units	2	0	24	0	7	2	18	8	24
Units in 2-unit Multi-Family Structures	2	0	24	0	4	2	12	4	24
Units in 3- and 4-unit Multi-Family Structures	0	0	0	0	3	0	6	4	0
Units in 5+ Unit Multi-Family Structures	0	0	0	0	0	0	0	0	0

3

Housing Permits										
year	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016
Total Units	207	189	120	189	105	92	109	109	100	124
Single-Family Units	157	184	120	189	105	92	109	109	100	118
Multi-Family Units	50	5	0	0	0	0	0	0	0	6
Units in 2-unit Multi-Family Structures	16	0	0	0	0	0	0	0	0	6
Units in 3- and 4-unit Multi-Family Structures	0	0	0	0	0	0	0	0	0	0
Units in 5+ Unit Multi-Family Structures	34	5	0	0	0	0	0	0	0	0

4 Source: WA State Employment Security Departments

5
6 Looking at Table 5-17 below, the County's projected 2036 population is 19,423. Using the 2016 a
7 household size of 2.04 people, the County would have 9,521 households by 2036. By dividing the
8 number of households (9,521) by the number of projected housing units (20,531) an estimate of the
9 2036 occupancy-rate is fifty-two percent. That means forty-seven percent of the housing stock
10 would be vacant. Vacant housing as a share of overall housing stock would increase by nearly four
11 percentage points over the 2015 rate of forty-three percent (Figure 5-7) and account for nearly half
12 of the total housing stock.
13