

**Tualatin 2040**  
**Findings of the HNA for**  
**Community**  
**Advisory Committee**  
**May 2, 2019**



# Presentation and Discussion Topics

- Key Findings of the Housing Needs Analysis and Buildable Lands Inventory
  - Do the key findings make sense to you?
  - Do you have comments about areas we need to look into further?
- Next Steps



## Key Findings of the Housing Needs Analysis

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# Opportunities for Needed Housing

## Single-Family Detached (Including Manufactured & Cottage Housing)



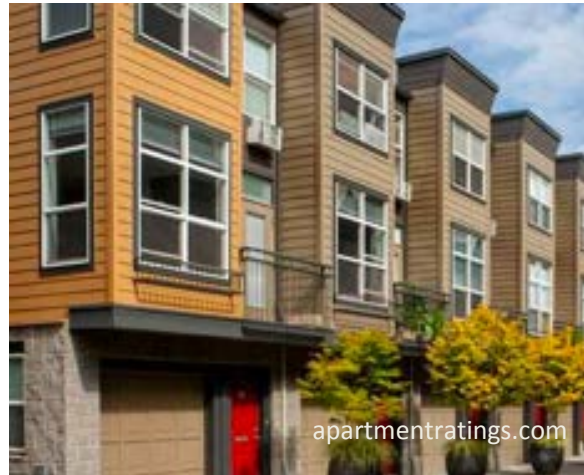
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# Opportunities for Needed Housing

## Single-Family Attached



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# Opportunities for Needed Housing

## Multifamily (3+ Units per Structure), (Tri- & 4-Plexes, Apartments & Condos)

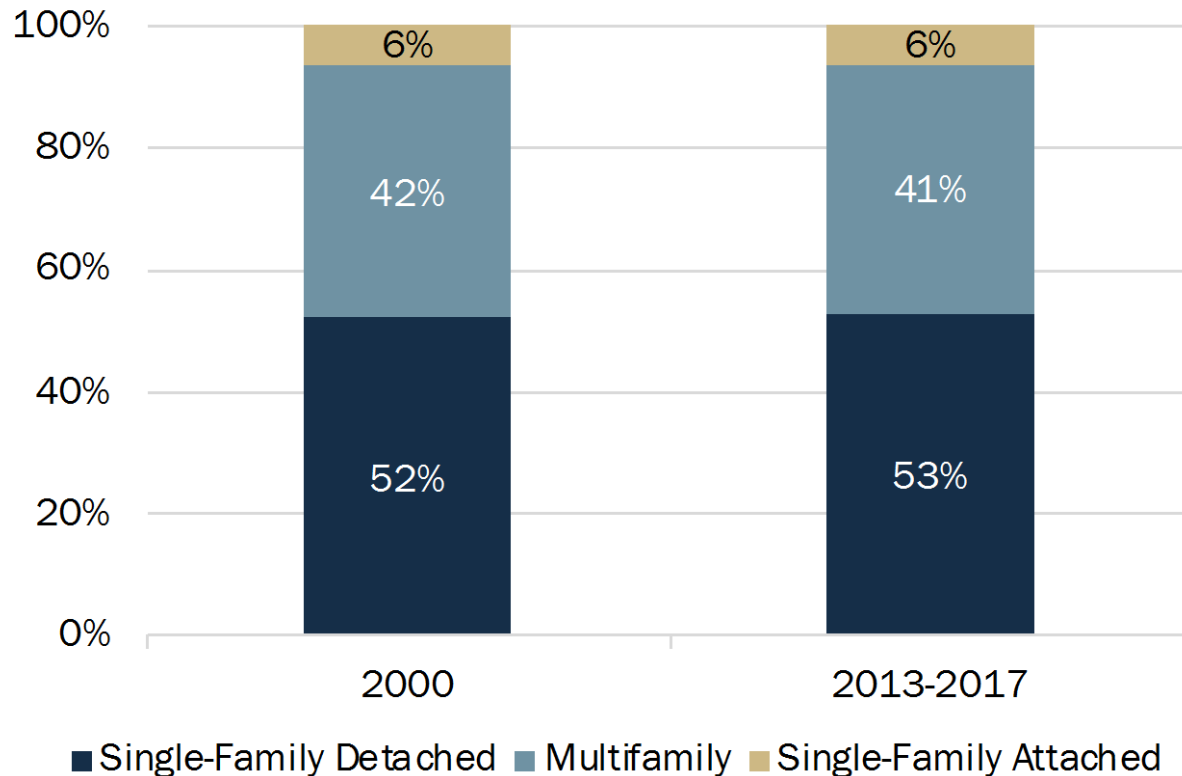


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# Housing Mix, Tualatin



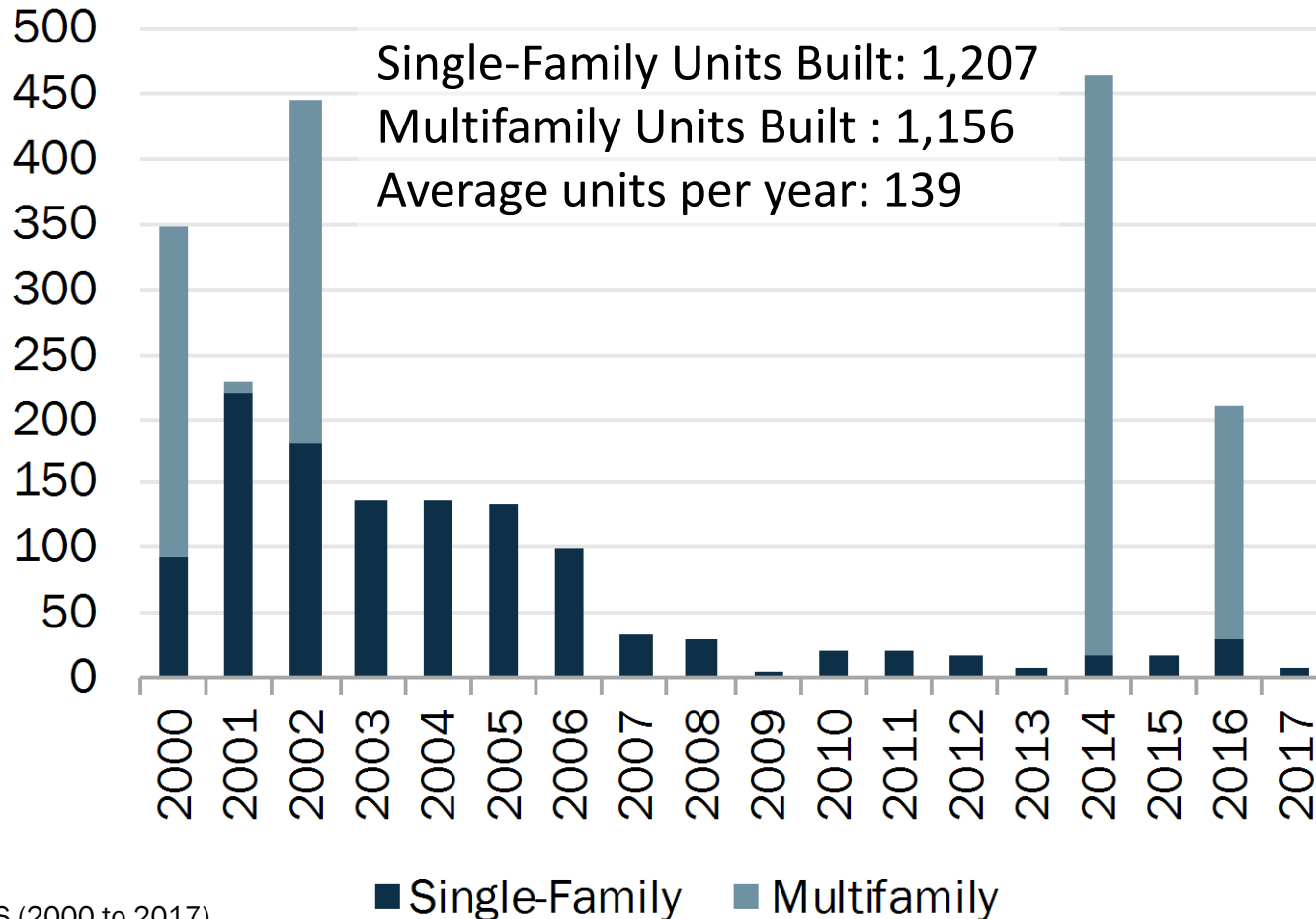
Source: U.S. Census, 2000, SF3 H30; U.S. Census, ACS 2013-2017, B25024

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# Units Built by Year & Type, Tualatin



Source: RLIS (2000 to 2017).

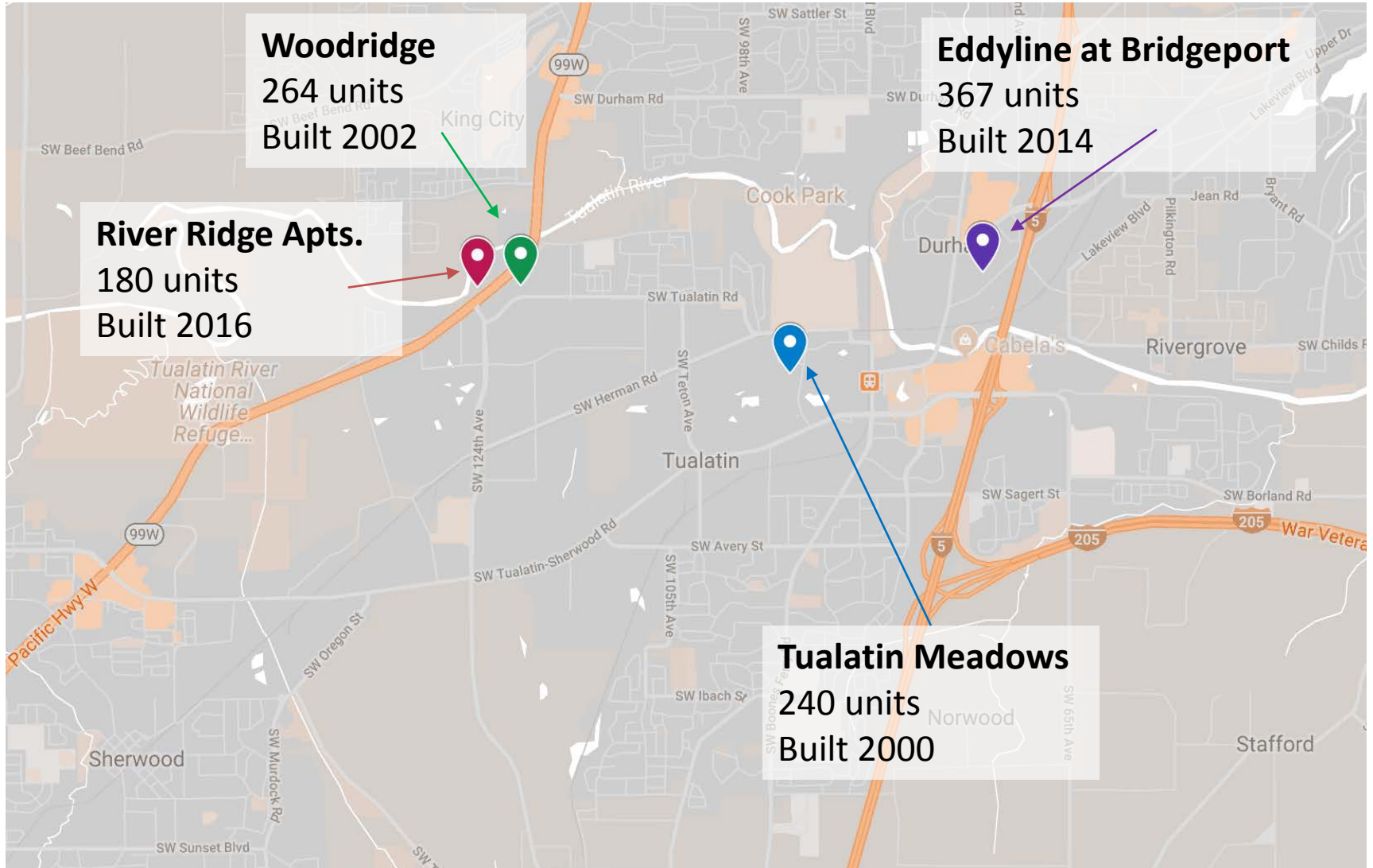
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# Multifamily Projects Sample, Tualatin





# Housing Density, Tualatin, 2000-2017

Single-family	Units	1,207
	Acres	189
	Net Density	6.4
Multifamily	Units	1,156
	Acres	48
	Net Density	24.2
Total, combined	Units	2,363
	Acres	237
	Net Density	10.0



Source: RLIS (2000 to 2017).

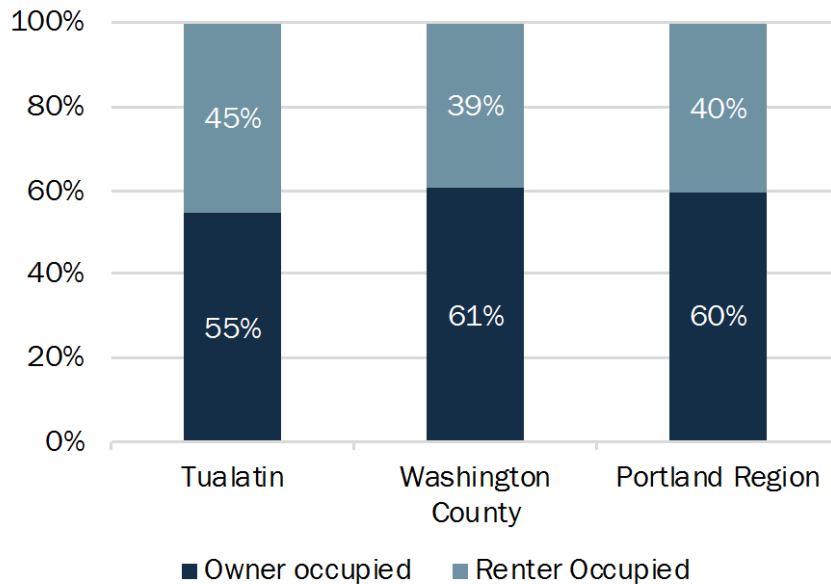
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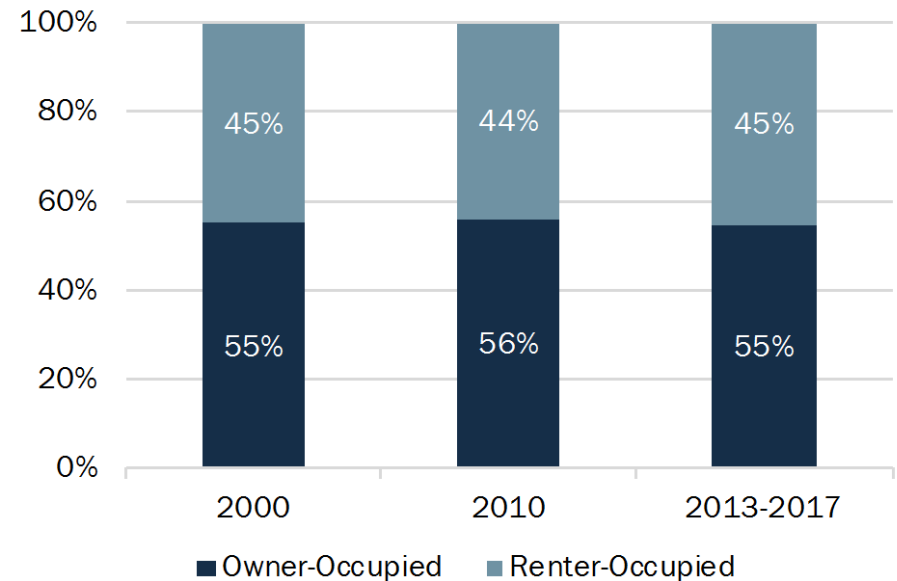


# Housing Tenure

## Regional Tenure



## Change in Tenure, Tualatin

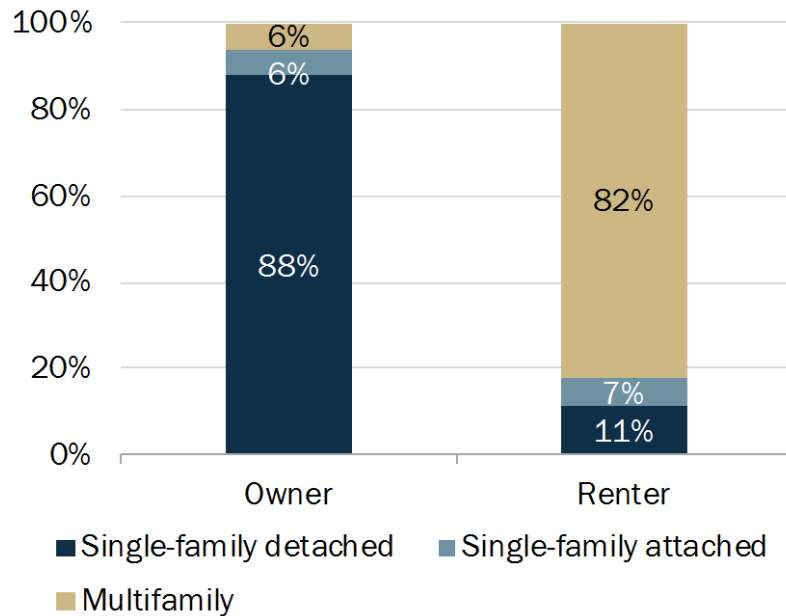


Source: U.S. Census 2000 and 2010, SF3 H032; U.S. Census, ACS 2013-2017, B25003.

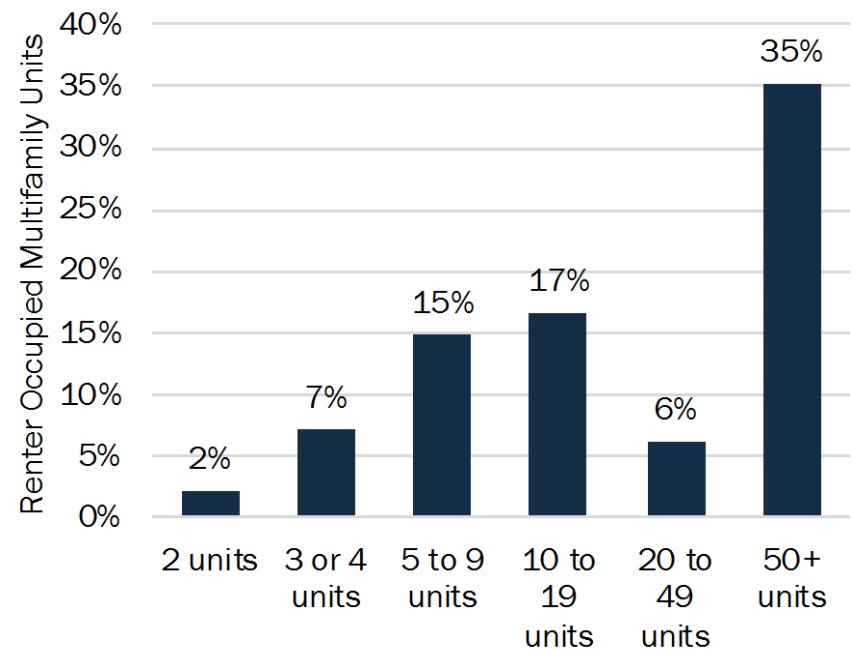


# Housing Tenure, Tualatin, 2017

## Tenure by Type of Unit



## Renter-Occupied, Multifamily Units

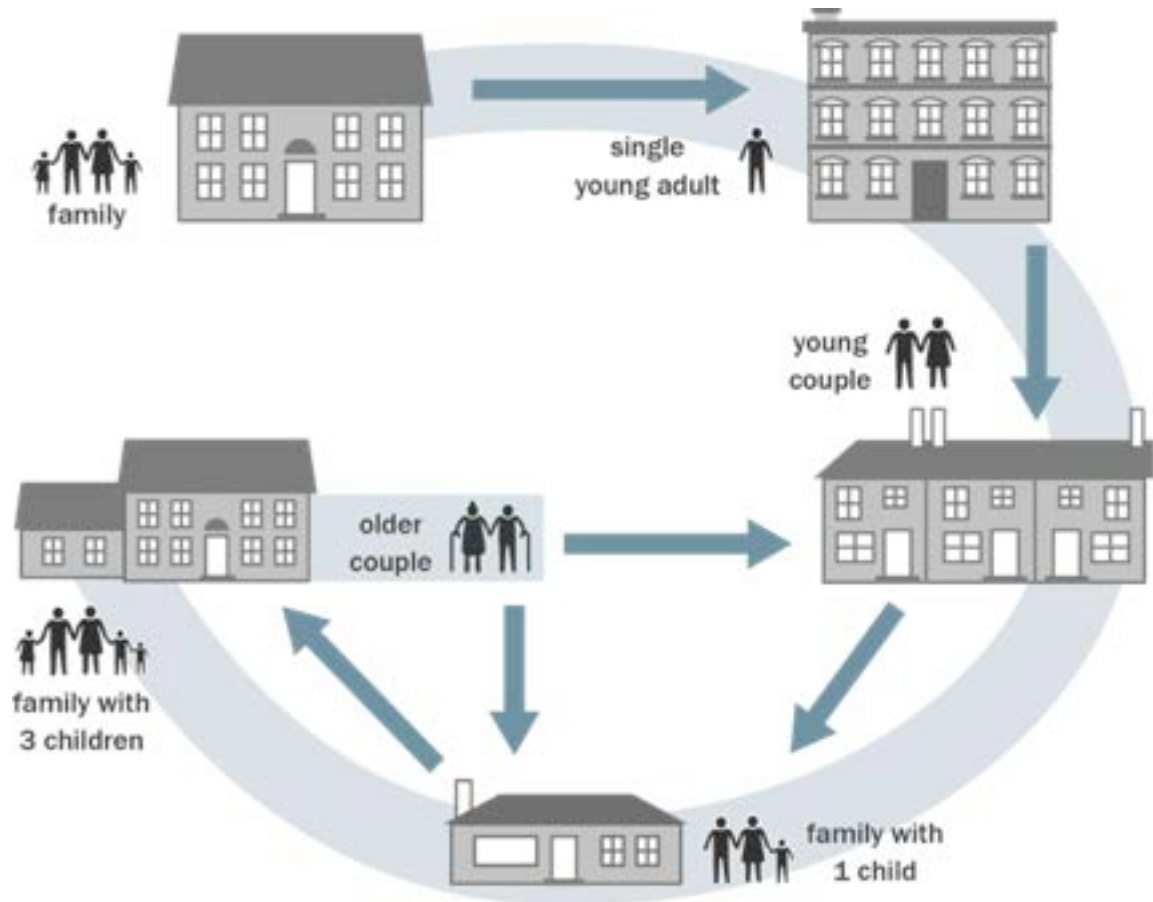


Source: U.S. Census 2000 and 2010, SF3 H032; U.S. Census, ACS 2013-2017, B25003.



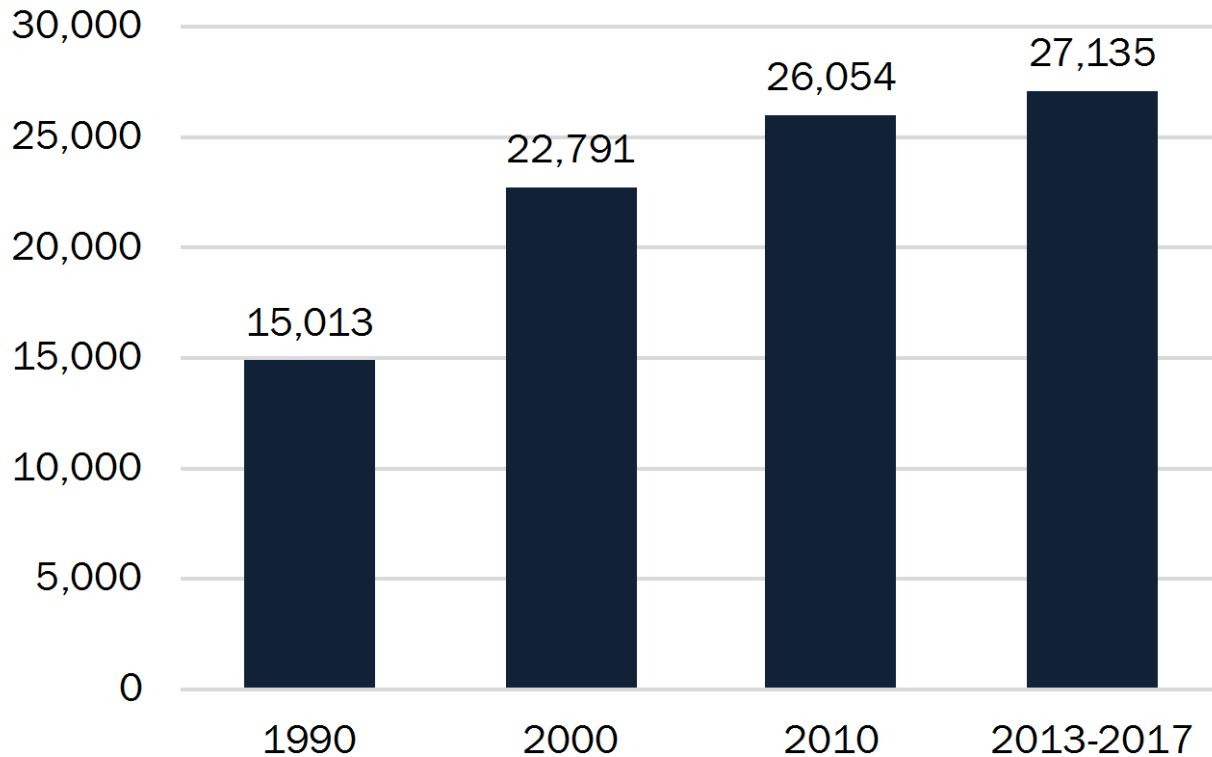
# Factors Affecting Housing Demand

- Age
- Household Composition
- Income





# Population Growth, Tualatin



Since 1990  
Growth of 12,122  
people

Average Annual  
Growth Rate: 2.2%

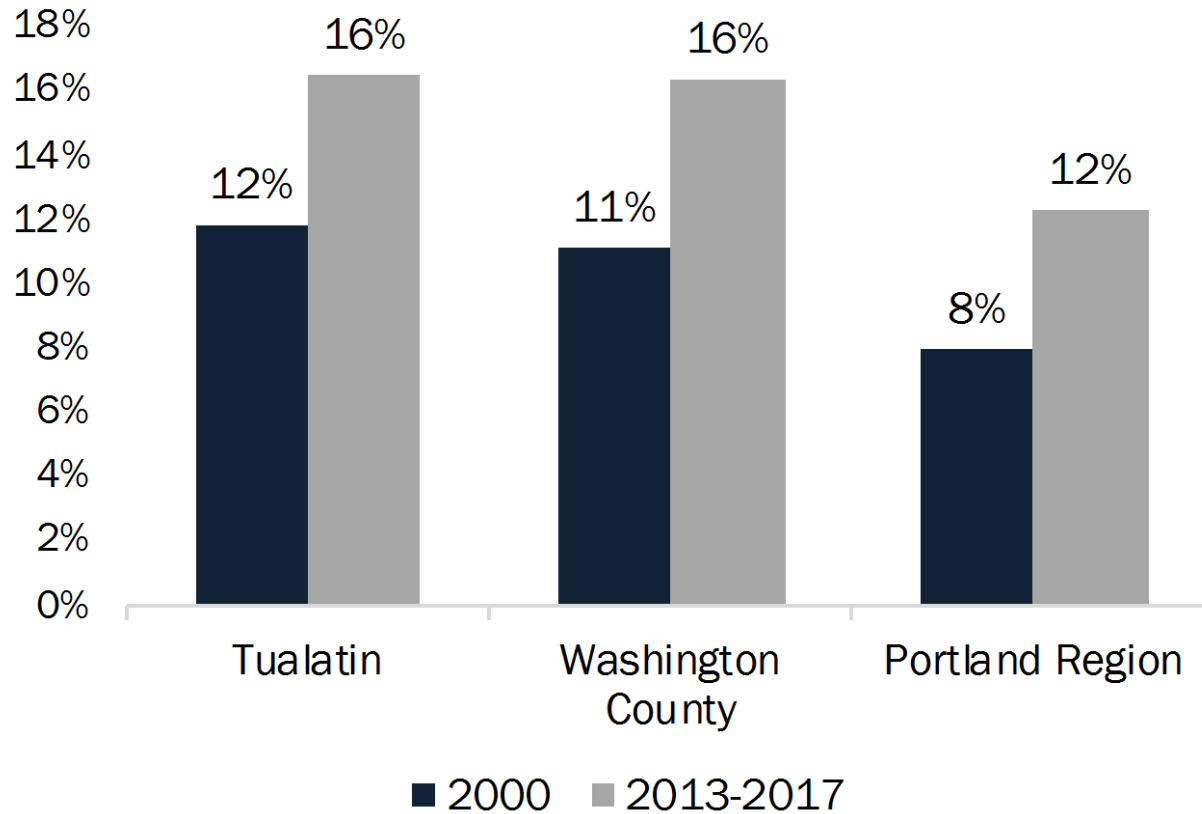
Source: U.S. Decennial Census 1990, 2000, and 2010 and ACS 2013-2017

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# Growth of Latinx Population



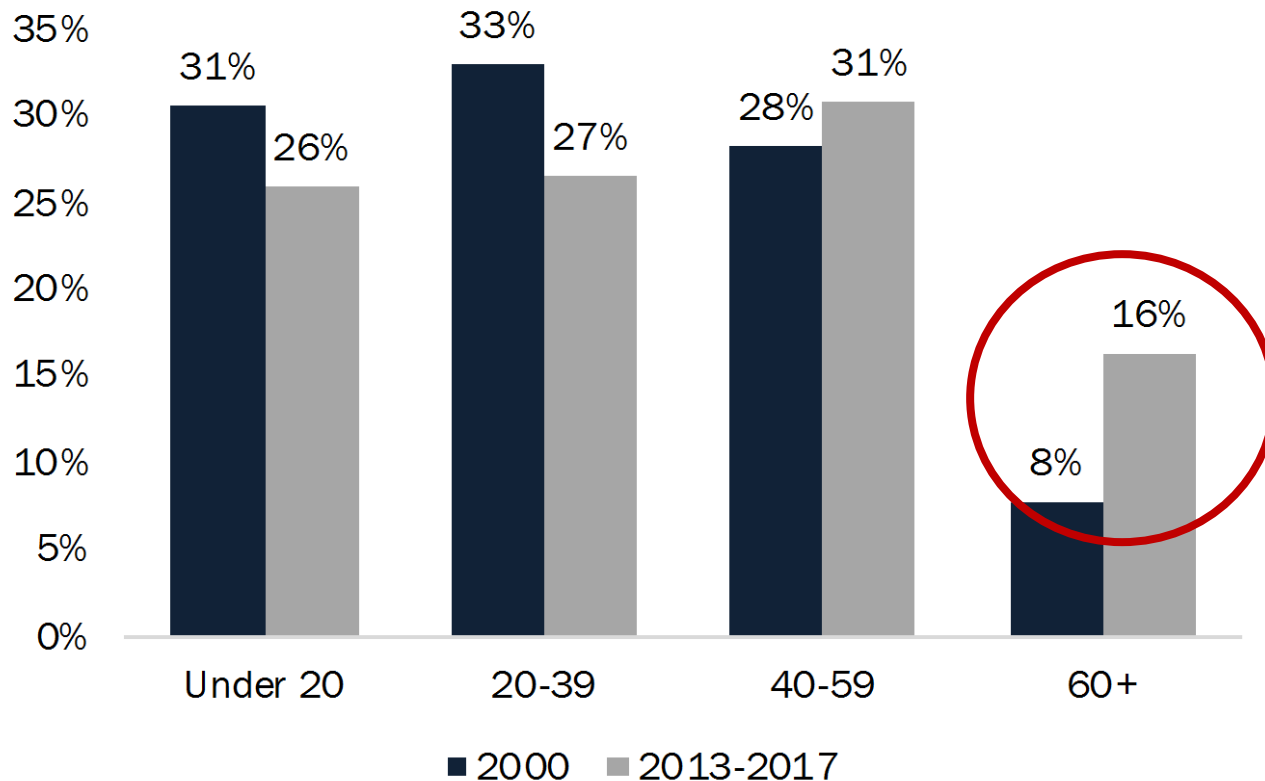
Source: U.S. Census, Decennial Census 2000 and ACS 2013-2017, Table P008 and B03002.

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# Aging Population, Tualatin



Source: U.S. Census, Decennial Census 2000 and ACS 2013-2017

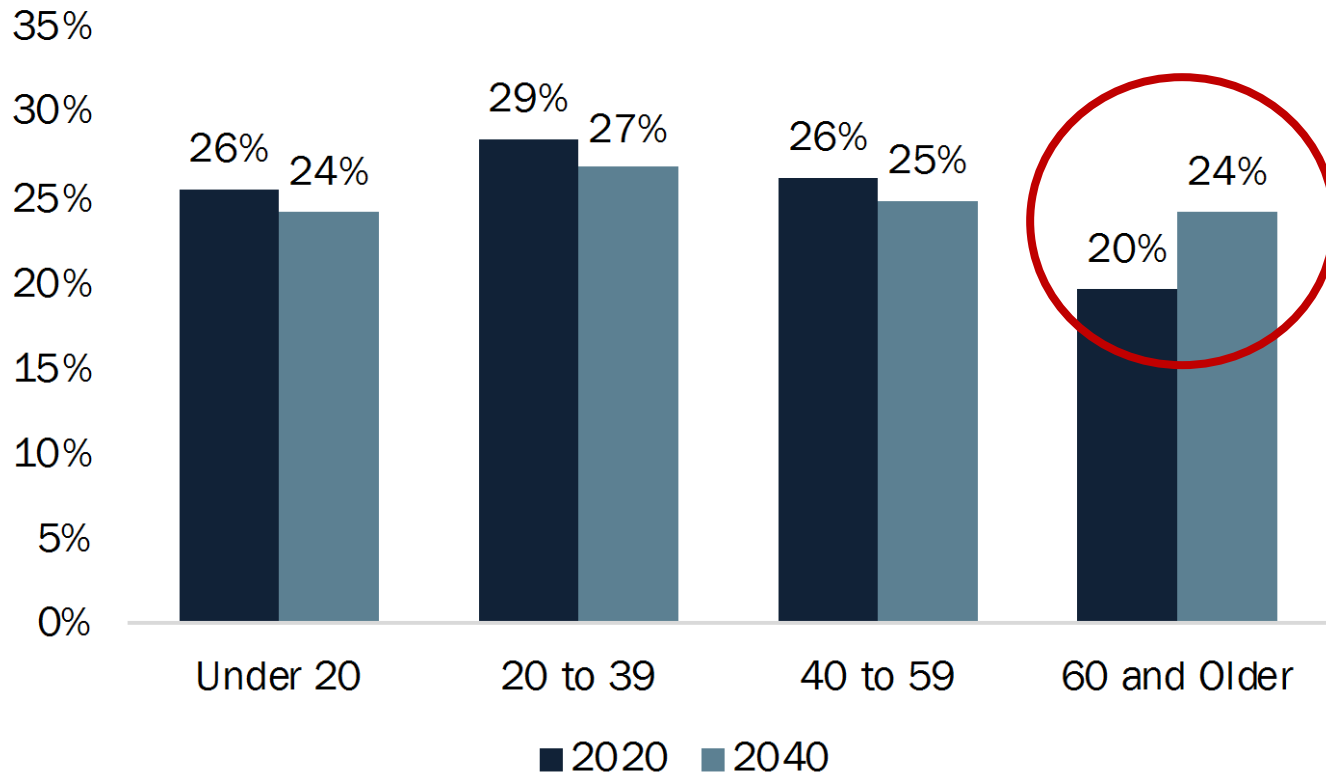
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# Population Forecast, Washington Co.



Source: Population Research Center, Portland State University, June 30, 2017.

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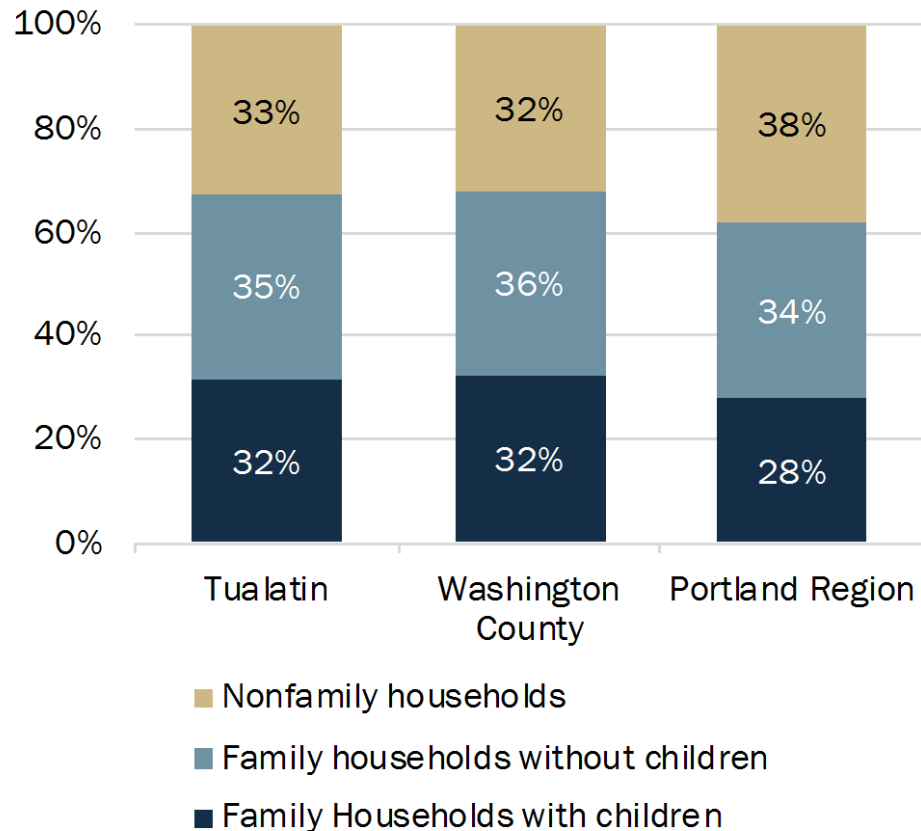


# Household Composition and Size

## Average Household Size in Tualatin:

- 2000: 2.62
- 2017: 2.49

## Change since 2010: Decline in households with children

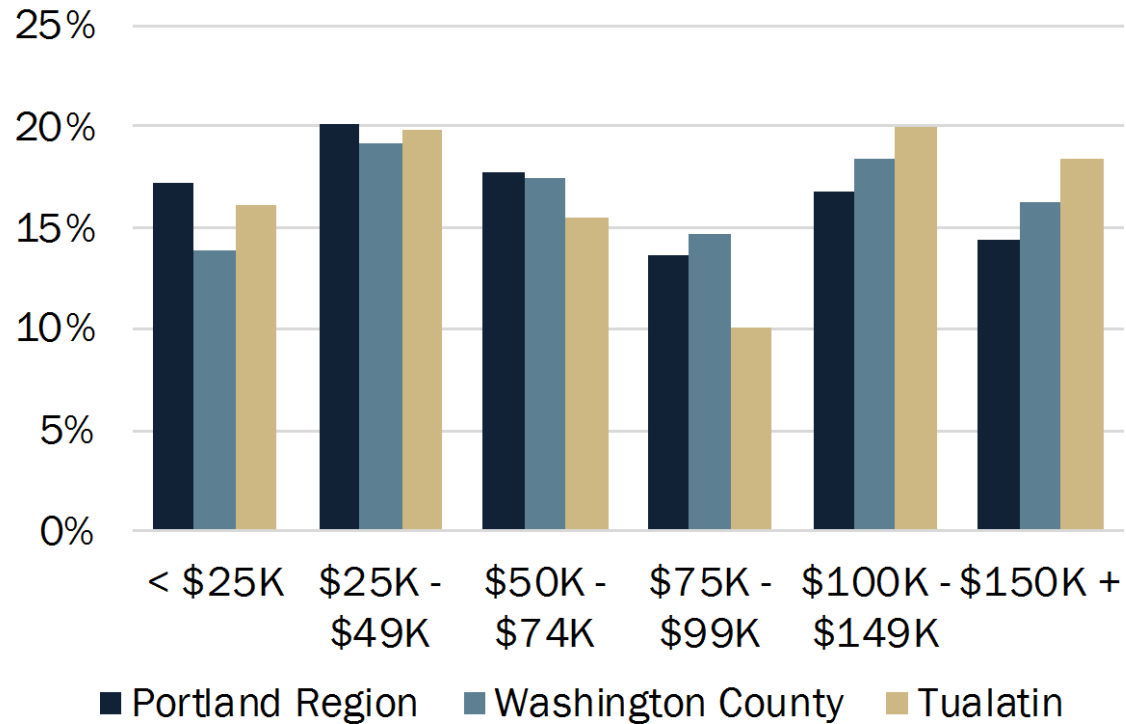


Source: U.S. Census, Decennial Census ACS 2013-2017



# Household Income, Tualatin

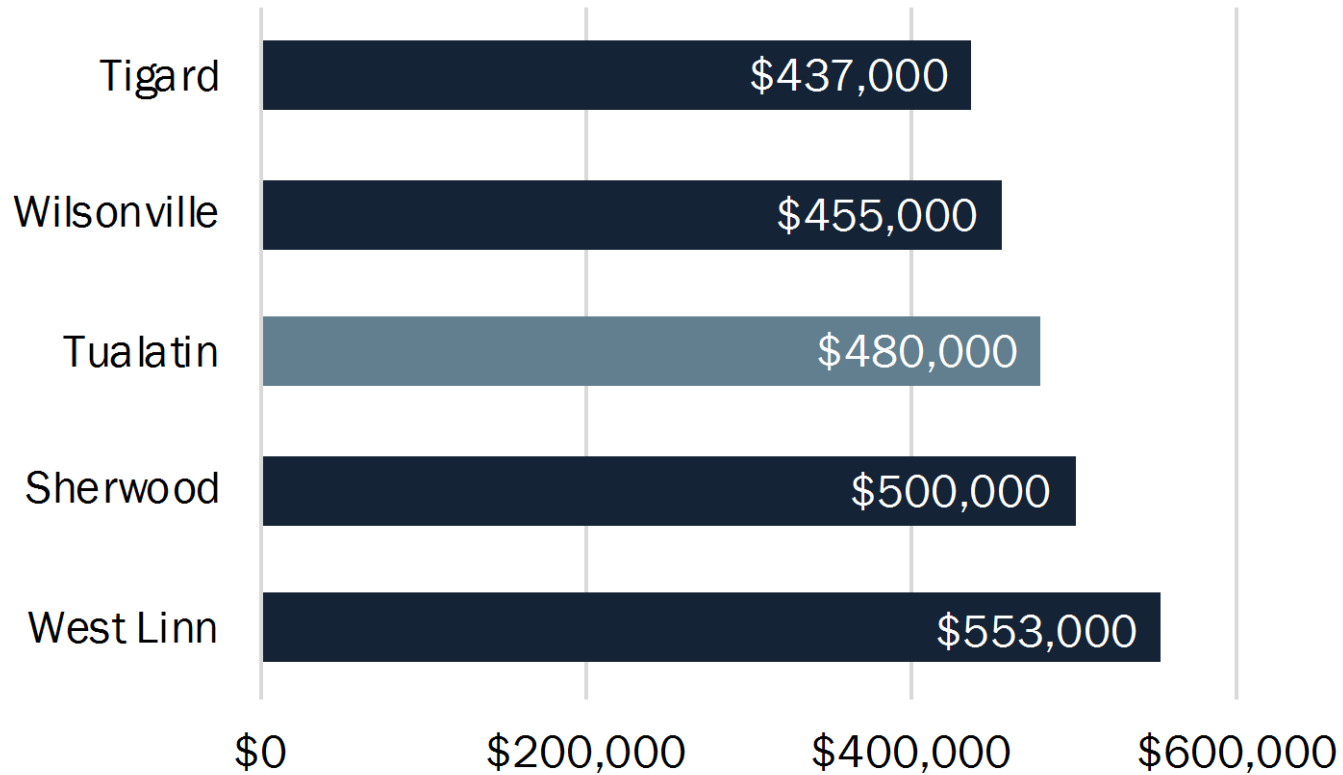
Tualatin's median household income: \$72,580



Source: U.S. Census, ACS 2013-2017



# Median Home Sale Price, Feb. 2019



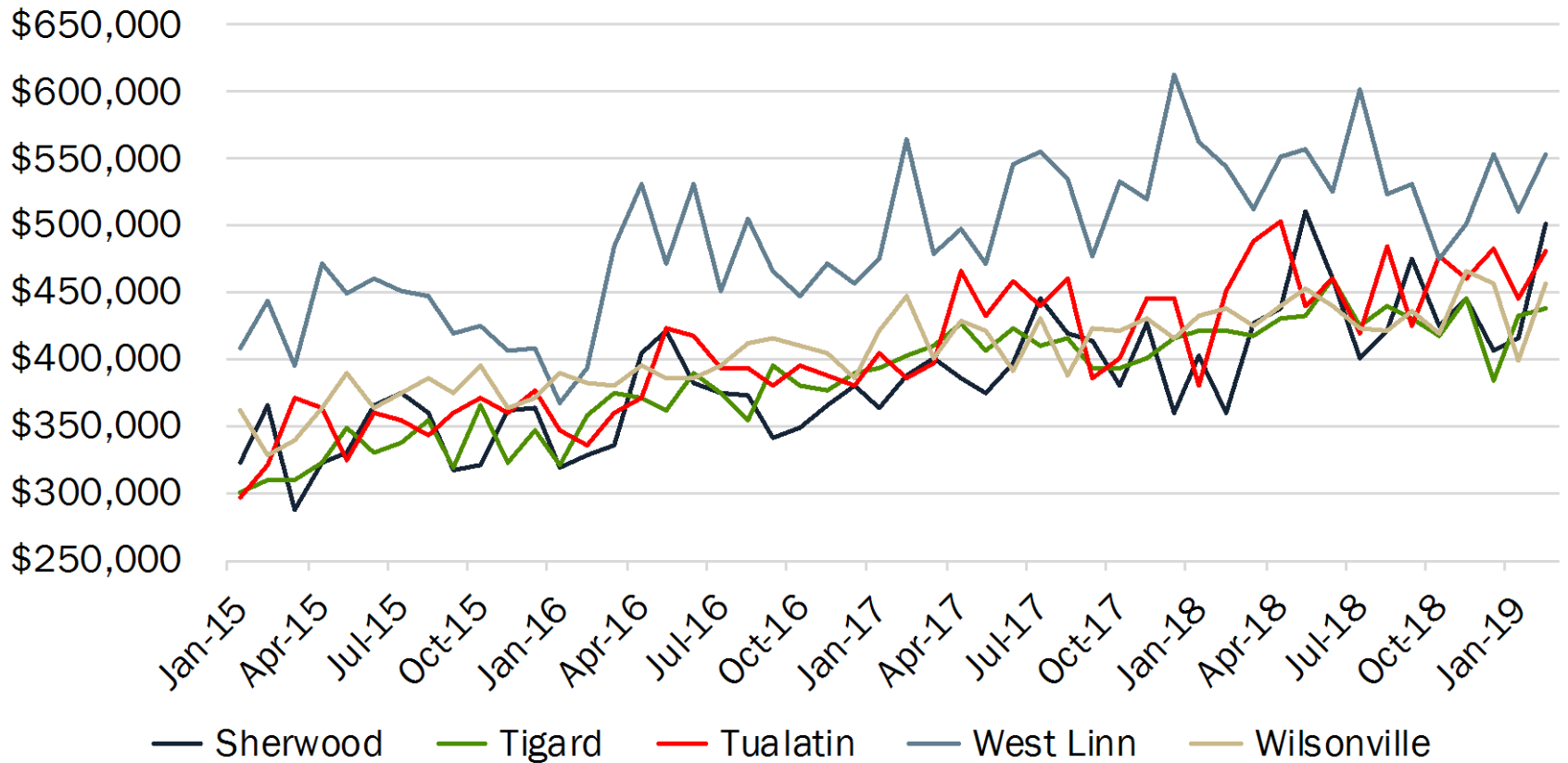
Source: Redfin

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# Med. Home Sale Price, 2015-2019



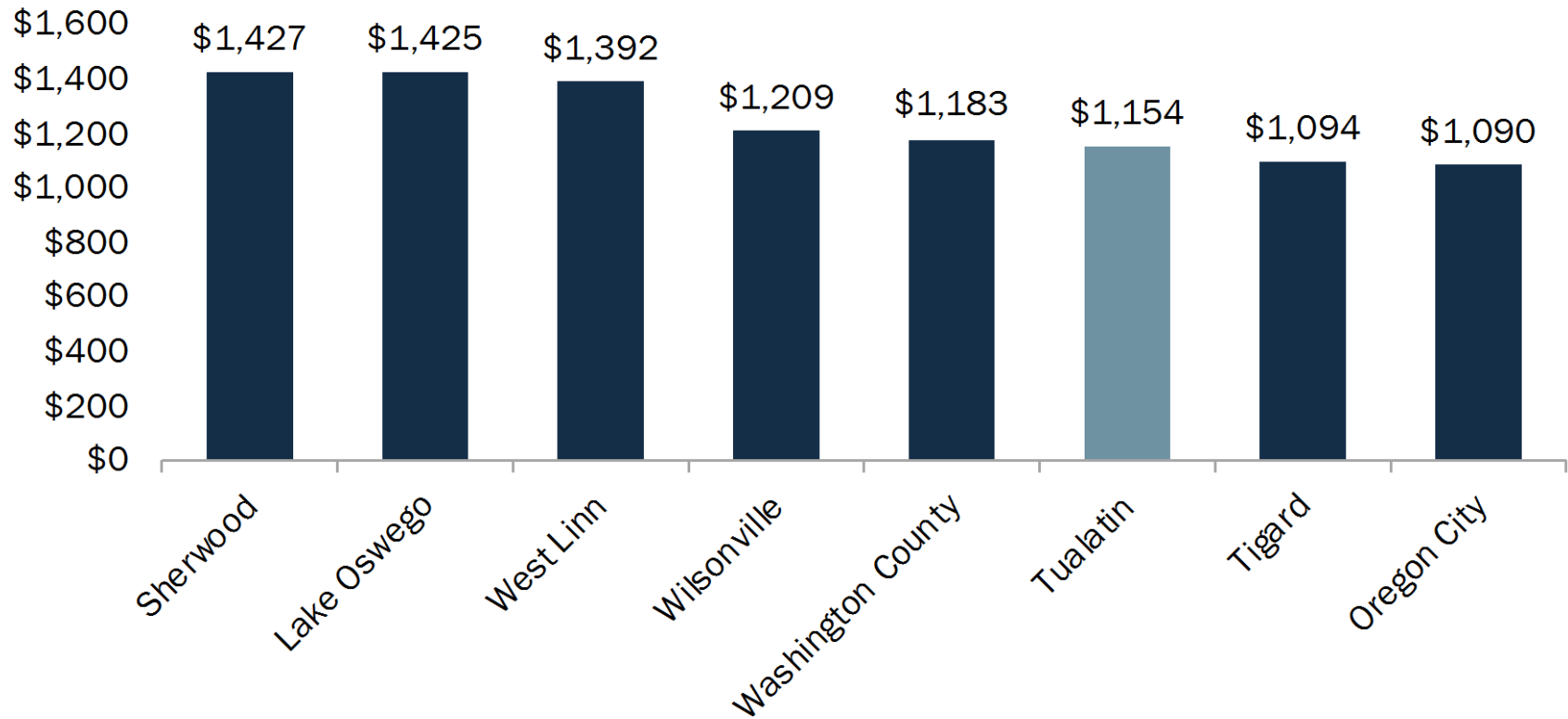
Source: Redfin

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# Median Rent



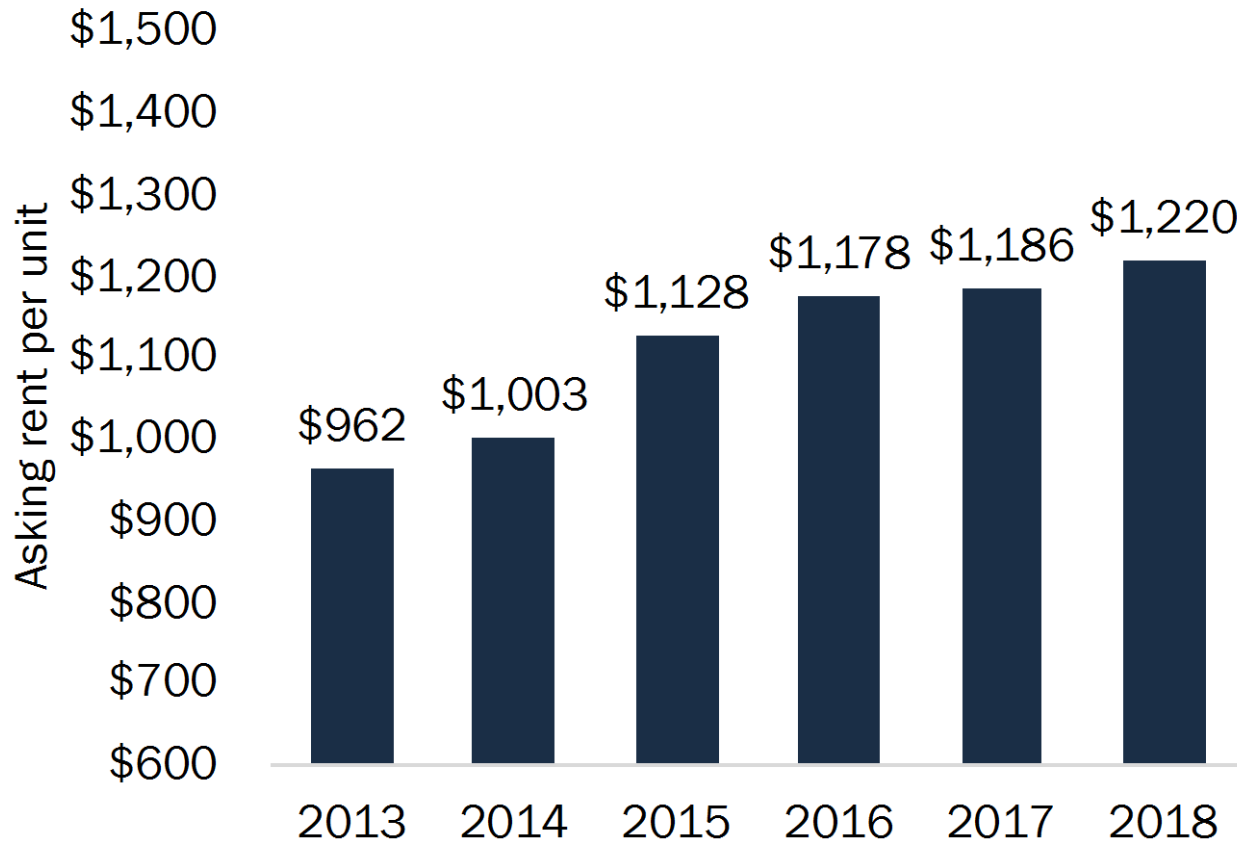
Source: U.S. Census, ACS 2013-2017

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# Avg. Multifamily Rent/Unit, Tualatin



2019 Q1	
Studio:	<b>\$1,019</b>
1-bedroom:	<b>\$1,097</b>
2-bedroom:	<b>\$1,293</b>
3-bedroom:	<b>\$1,499</b>

Source: Costar

Tualatin 2040:  
Findings of HNA prepared and compiled by ECONorthwest

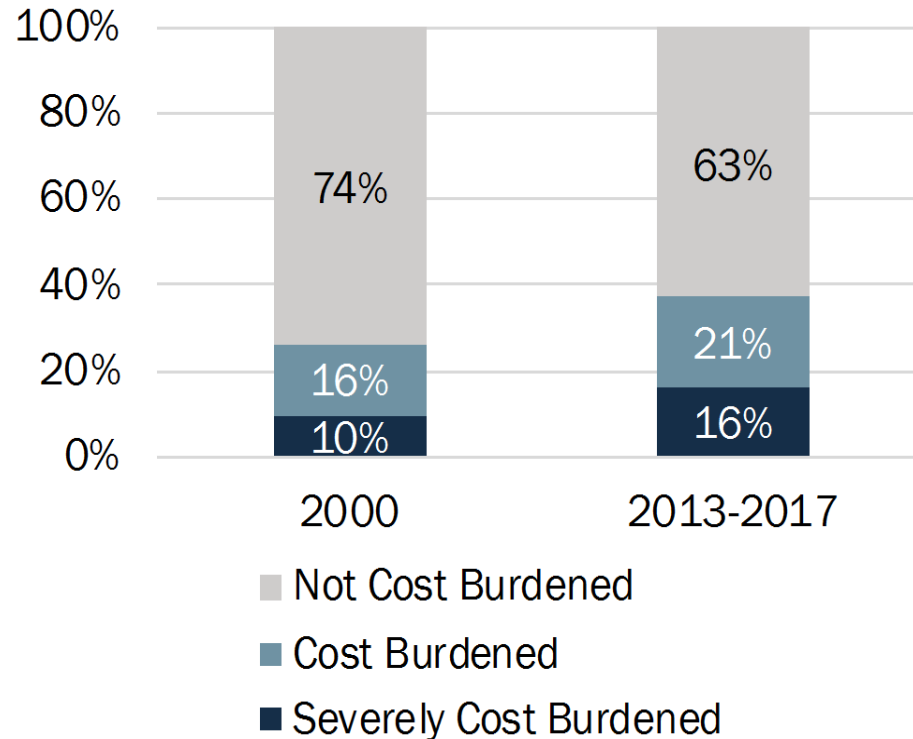
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# Cost Burden Households Change

Households paying 30% or more for housing costs are said to be cost burdened.

Share of Cost Burdened Households Increased by:  
**11%**



Source: U.S. Census, Decennial 2000 and American Community Survey 2013-2017

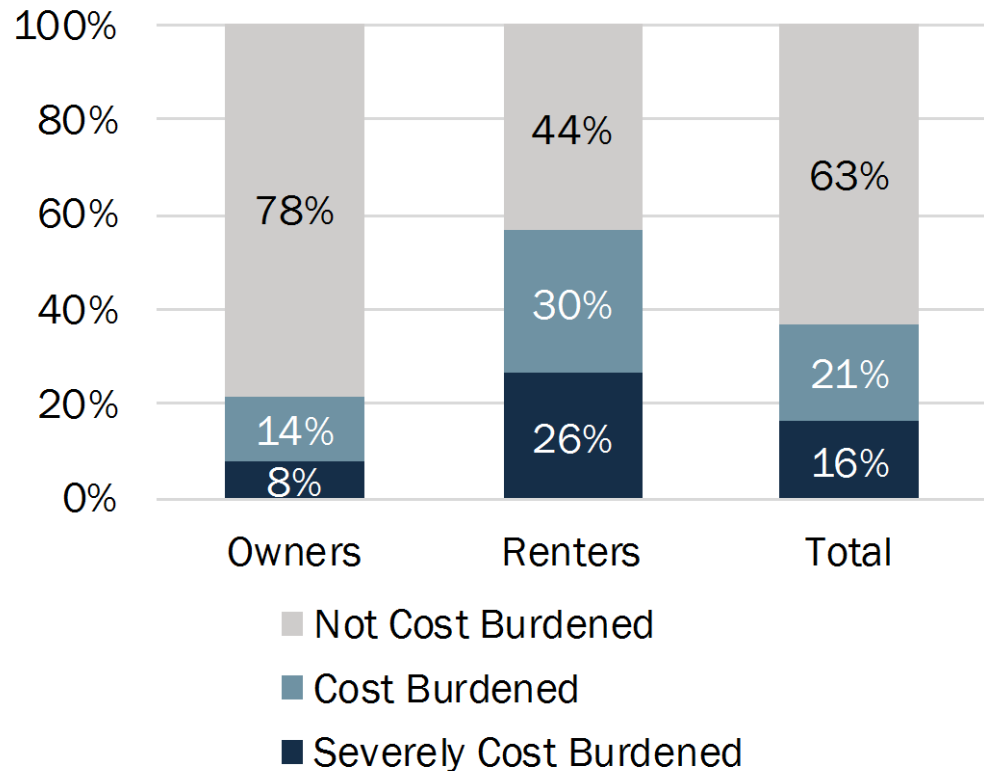




# Cost Burden by Tenure, 2017

Households paying 30% or more for housing costs are said to be cost burdened.

**Cost Burdened:  
56% of Renter households;  
22% of Owner households.**



Source: U.S. Census, Decennial 2000 and American Community Survey 2013-2017



# Affordable Housing Costs by Income

*If your household earns....*

**\$24,000**

(30% of MFI)

**\$41,000**

(50% of MFI)

**\$65,000**

(80% of MFI)

**\$81,000**

(100% of MFI)

**\$98,000**

(120% of MFI)

*Then you can afford....*

**\$600**

monthly rent

**\$1,018**

monthly rent

OR

**\$123,000-  
\$144,000**

home sales price

**\$1,625**

monthly rent

OR

**\$228,000-  
\$260,000**

home sales price

**\$2,025**

monthly rent

OR

**\$284,000-  
\$324,000**

home sales price

**\$2,450**

monthly rent

OR

**\$343,000-  
\$392,000**

home sales price



Cashier  
\$25,930



Postal Carrier  
\$42,240



Landscape  
Architect  
\$62,860



Real Estate  
Manager  
\$81,830



Electrical  
Engineer  
\$96,550



Nursing Assistant  
\$32,350



Teacher  
\$55,150



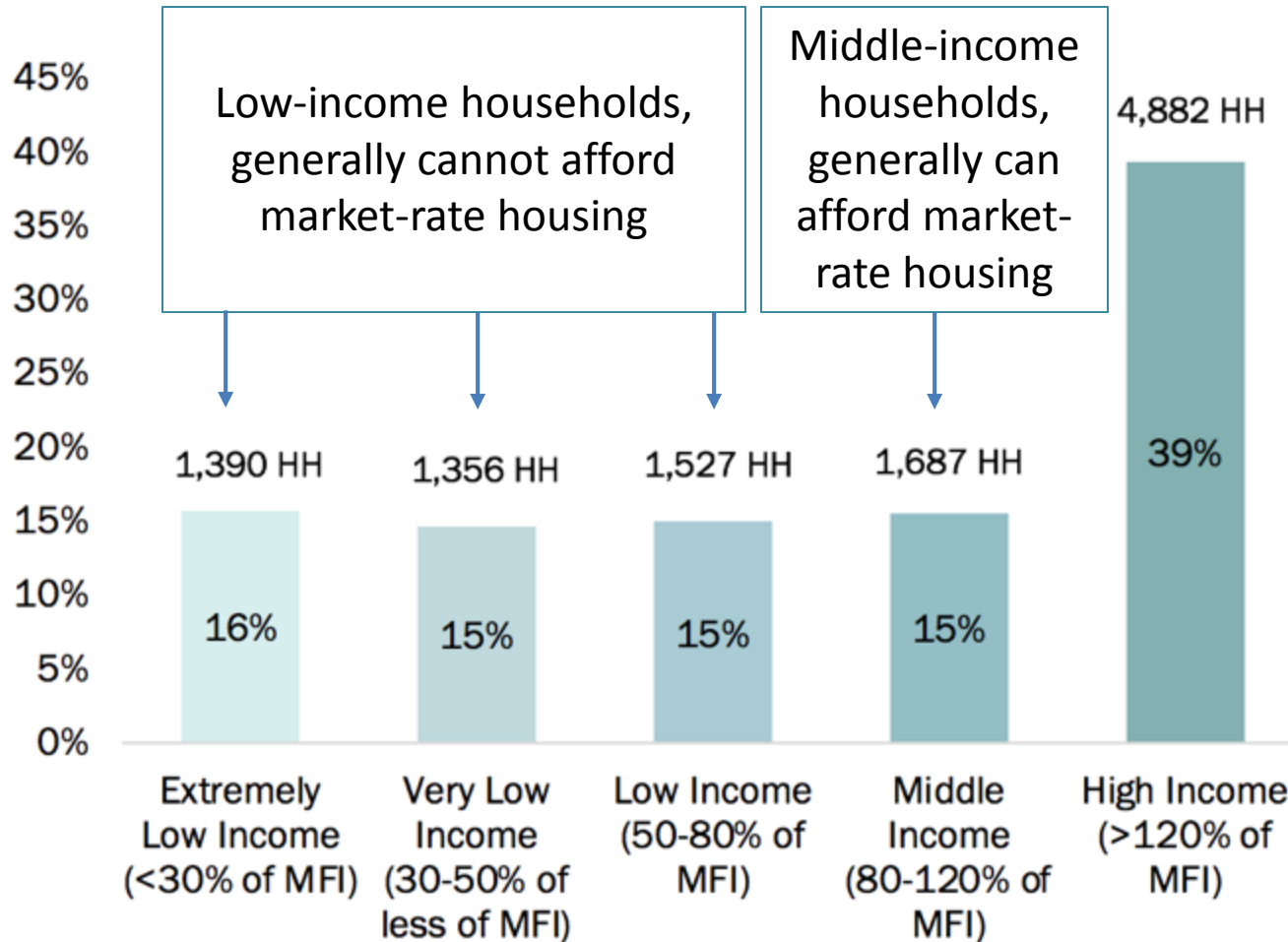
Police Officer  
\$73,400



Financial Analyst  
\$90,180



# Households by Income Level, Tualatin





## Forecasting Tualatin's Housing Needs

Tualatin 2040:  
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# Forecast of Housing Growth, 2020-40

2020-2040: 1,014 new households

Variable	New DU City Limits	New DU Basalt Creek	New DU Tualatin Planning Area
Household Forecast 2020	10,791	203	10,994
Household Forecast 2040	11,362	646	12,008
Total New Dwelling Units (2020-2040)	571	443	1,014
Annual Average of New Dwelling Units	29	22	51

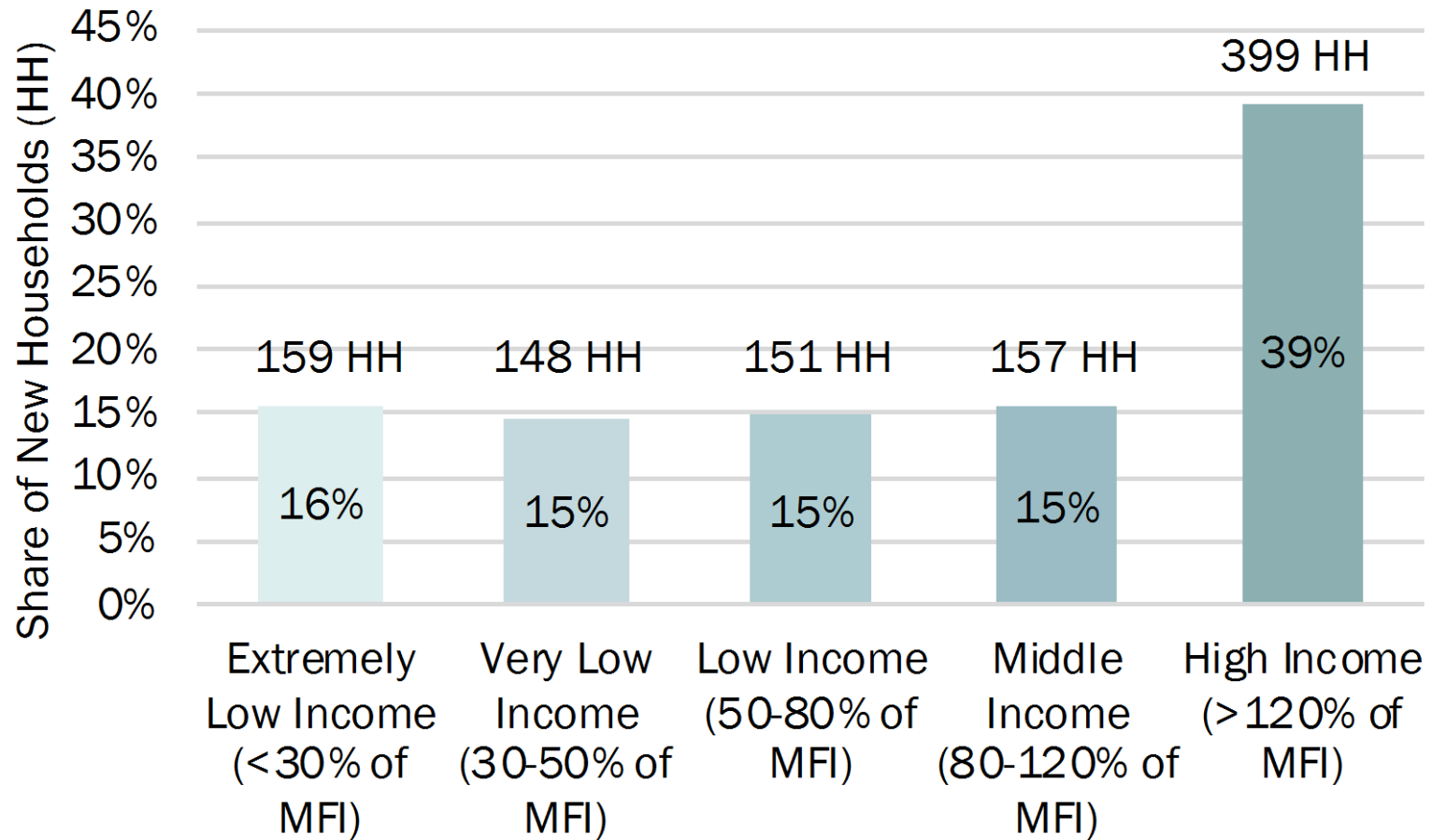
Source: Metro 2040 Household Distributed Forecast, Exhibit A (July 12, 2016).

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# New Units by Income, 2020-2040





# Goal 10: Housing

## OAR 660-007 Requirements

- “Jurisdictions...must either designate sufficient buildable land to provide the opportunity for at least 50 percent of new residential units to be attached single family housing or multiple family housing or justify an alternative percentage based on changing circumstances.”
- “...Tualatin...must provide for an overall density of eight or more dwelling units per net buildable acre.”



# Forecast by Housing Type, 2020-2040

Variable	Mix of New Dwelling Units (2020-2040)
Needed new dwelling units (2020-2040)	1,014
Dwelling units by structure type	
Single-family detached	
Percent single-family detached DU	50%
<i>equals</i> Total new single-family detached DU	506
Single-family attached	
Percent single-family attached DU	9%
<i>equals</i> Total new single-family attached DU	92
Multifamily	
Percent multifamily	41%
Total new multifamily	416
<i>equals</i> Total new dwelling units (2020-2040)	1,014

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# What types of Housing?



homedesigndecomag.com



Brandon Macz



Trammell Crow Residential



Strongtowns.org



Green Hammer



Strongtowns.org



## Preliminary Residential Buildable Land Inventory Results

Tualatin 2040:  
Preliminary BLI Results prepared by ECONorthwest

May 2, 2019



# Buildable Lands Inventory

## Land Base

1. Gather and Assemble Data
2. Classify Land
3. Identify Constraints
4. Identify Redevelopment Potential
5. Verification
6. Summarize Results



# Buildable Lands Inventory

## Land Base

- Low Density (RL)
- Medium-Low Density (RML)
- Medium-High Density (RMH)
- High Density (RH)
- High Density / High Rise (RH/HR)
- Central Tualatin Overlay Zone – Residential Subdistricts
- Mixed Use Commercial Overlay Zone



# Buildable Lands Inventory

## Land Classifications

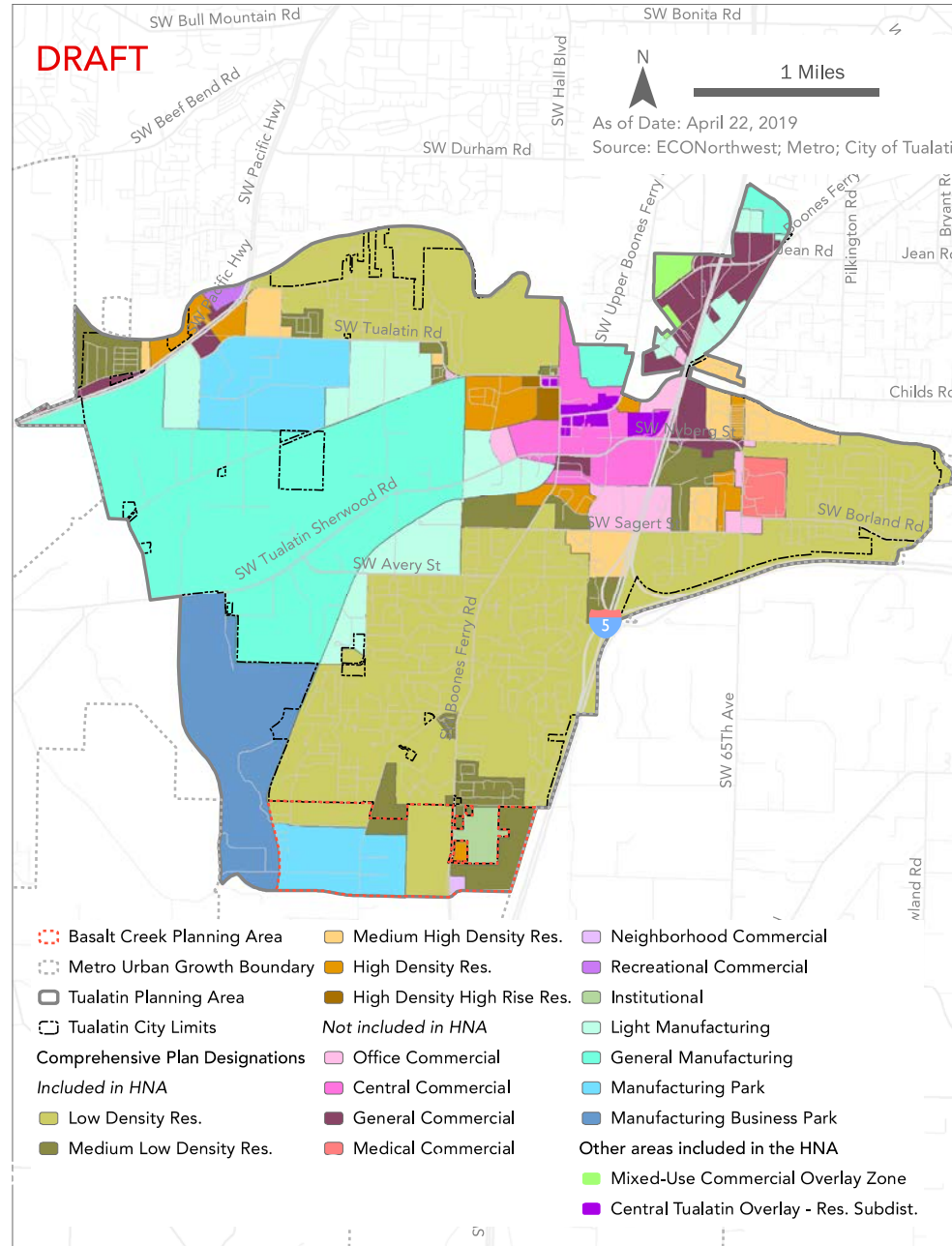
- **Developed**
  - Land that is not vacant, partially vacant, or public/exempt
- **Partially Vacant**
  - SF tax lots with an existing dwelling, a lot size that is 2.5 times the minimum lot size, **and** building value is <\$300,000.
  - **Or** SF tax lots with an existing dwelling and a lot size that is over 5 times the minimum lot size.
  - Assumed 0.25 of lot is developed and remaining *unconstrained* area is vacant.
- **Vacant**
  - Fully vacant based on aerial
  - Tax lots with < 2,000 sq ft developed & developed are less than 10% of lot
  - Lots 95% or more vacant
- **Public or Exempt**
  - Land in public or semi-public (i.e. church) ownership or land with a conservation easement



# Buildable Lands Inventory

## Development Constraints

- Floodways
- 100 Year Floodplain
- Steep Slopes - > 25% slope
- Riparian Corridors
- Regulated wetlands and habitat
  - Discussing with Clear Water Services

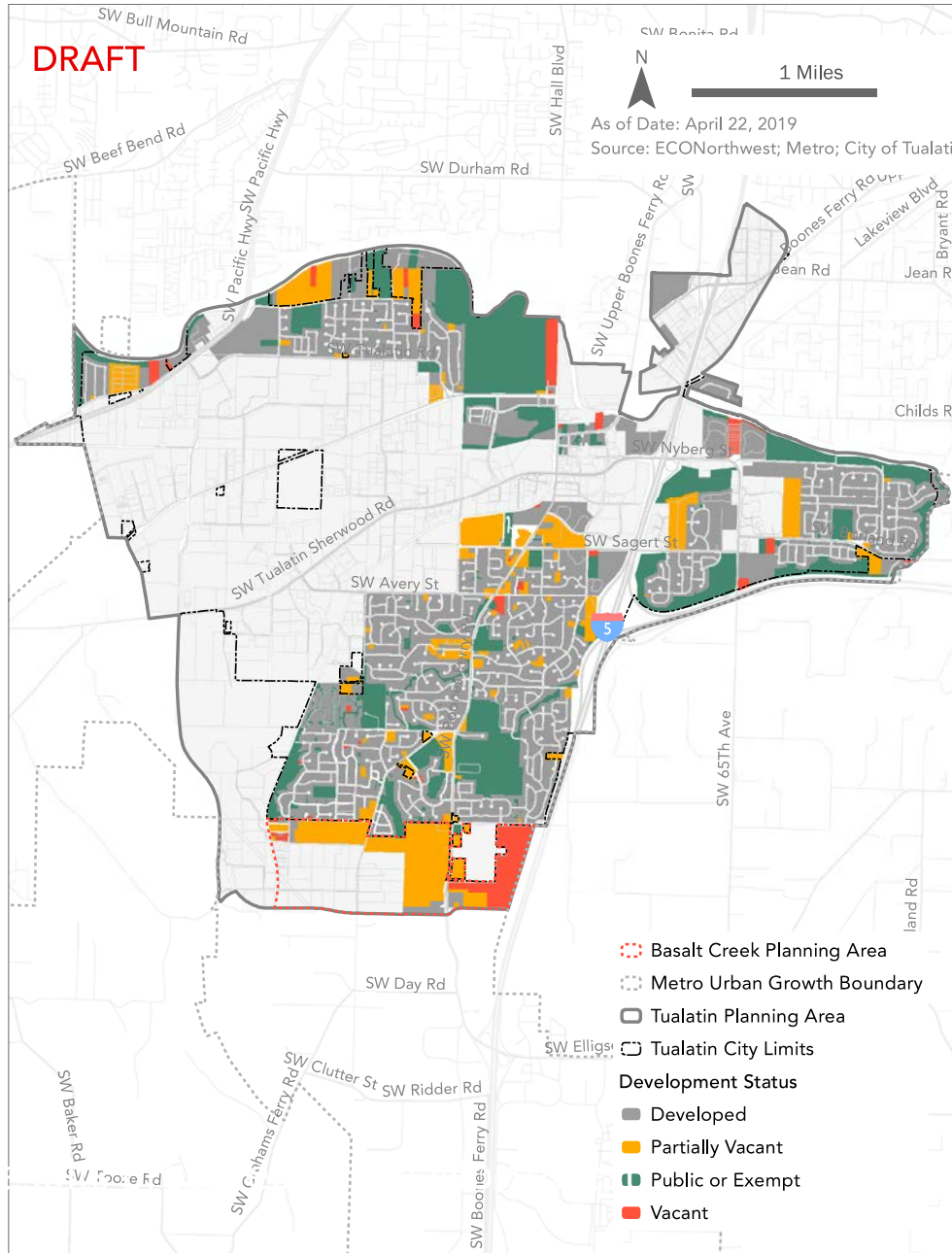


Tualatin 2040:  
Preliminary BLI Res

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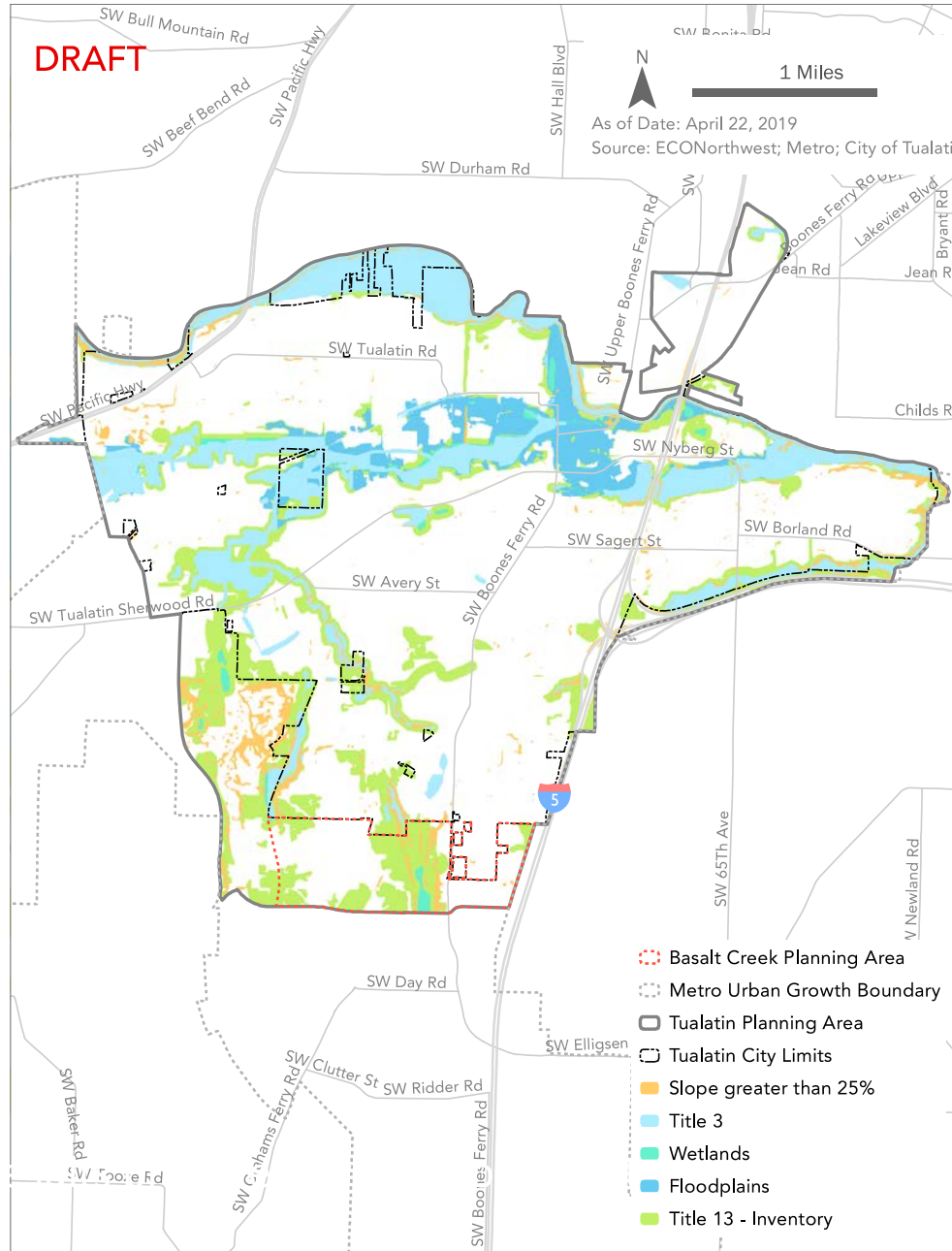
Tualatin 2040:  
Preliminary BL

May 2, 2019





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Tualatin 2040:  
Preliminary BL

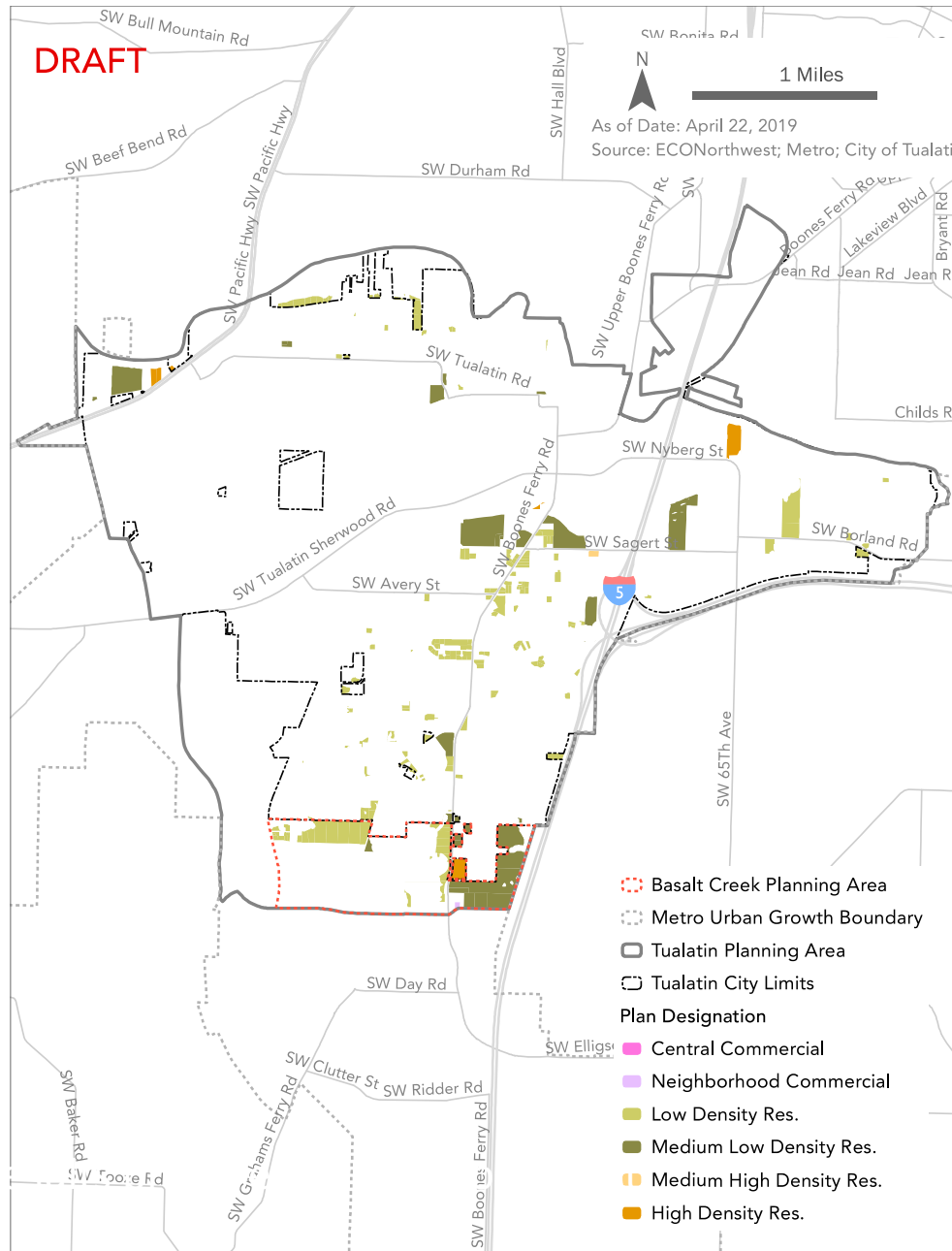
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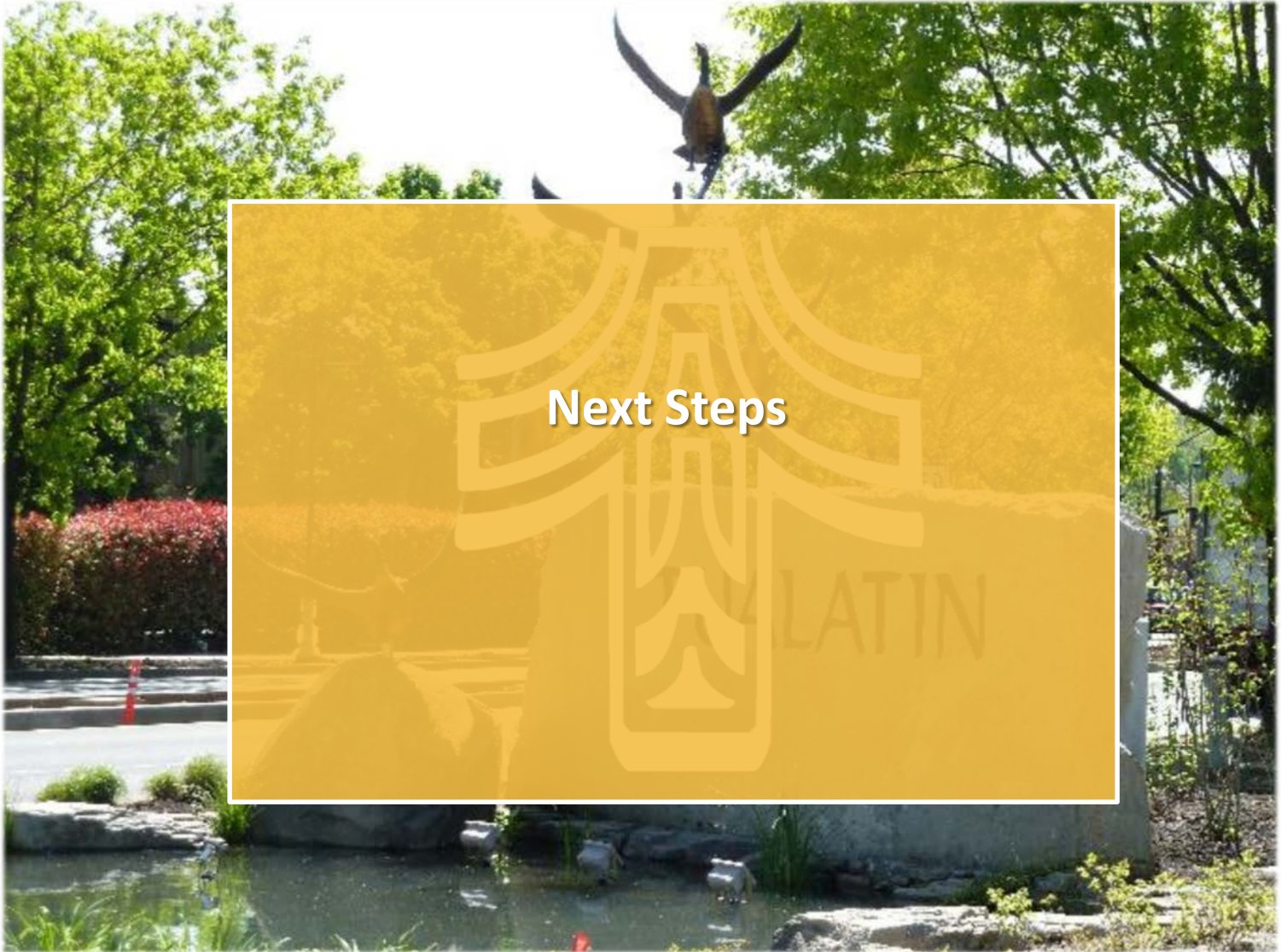
Tualatin 2040:  
Preliminary Block

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# Vacant and Partially Vacant Lands without constraints

Generalized Plan Designation	Total buildable acres	Buildable acres on vacant lots	Buildable acres on partially vacant lots
<b>Residential</b>			
Low Density Residential	67	11	57
Medium Low Density Residential	86	0	86
Medium High Density Residential	1	1	0
High Density High Rise Residential	0	0	0
High Density Residential	11	11	0
<b>Total</b>	<b>166</b>	<b>23</b>	<b>142</b>



# Next Steps



## Next Steps

- ECONorthwest to revise findings of the Housing Needs Analysis and Buildable Lands Inventory
- Next CAC meeting: May 23, 2019 at 6p - 8p
  - Presentation of land capacity and sufficiency
  - Housing strategy discussion



Tualatin 2040:  
Questions

May 2, 2019