



# Keizer Housing Needs Analysis Project Advisory Meeting #1

January 14, 2019

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# Project Overview

# Why is Keizer doing a Housing Needs Analysis?

- How much growth in 20-years?
- How much land?
- Where is the buildable land?
  - Vacant; unconstrained physically or by policy
- What development patterns make sense?
- Does Keizer have enough buildable residential land?

# Statewide Planning Goal 10 -

## Housing

“Buildable lands for residential use shall be inventoried and plans shall encourage the availability of adequate numbers of needed housing units at price ranges and rent levels which are commensurate with the financial capabilities of Oregon households and allow for flexibility of housing location, type and density.”

# Needed Housing Types (ORS

197.303)

- Housing that includes, but is not limited to, attached and detached single-family housing and multiple family housing for both owner and renter occupancy;
- Government assisted housing;
- Mobile home or manufactured dwelling parks;
- Manufactured homes on individual lots planned and zoned; and
- Housing for farmworkers.

# Steps in the HNA/BLI

1. Project the number of new housing units needed in the next 20 years
2. Review relevant national, state, and local demographic and economic trends and factors that may affect housing mix
3. Describe the demographic characteristics of the population, and, household trends that relate to demand for different types of housing
4. Determine the types of housing that are likely to be affordable to the projected households based on household income
5. Estimate the number of additional needed units by structure type
6. Determine the needed density ranges for each plan designation and the average needed net density for all structure types

# Outline of the Housing Needs Analysis Document

Chapter	Review Timeline
Chapter 1. Introduction	PAC 4
Chapter 2. Residential Buildable Lands Inventory	PAC 2
Chapter 3. Historical and Recent Development Trends	PAC 1
Chapter 4. Demographic and Other Factors Affecting Residential Development in Keizer	PAC 1
Chapter 5. Housing Needs in Keizer	PAC 1, PAC 3
Chapter 6. Residential Land Sufficiency within Keizer	PAC 3, PAC 4



# Process Overview

# Project Advisory Committee Role

- Provide feedback on trends and site needs memo, buildable lands inventory, and final HNA document
- Provide local context
- Assist in facilitating discussion at public meeting



# PAC Meeting Dates and Topics

PAC	Date	Topic(s)
PAC 1	Jan 14	Discuss framework and methodology for the Housing Needs Analysis, housing market trends, housing projection
PAC 2	Feb 20	Discuss draft results of buildable lands inventory, begin to discuss housing policies
PAC 3	Mar 25	Discuss housing needs, discuss housing policies
PAC 4	Apr 22	Revisit residential land sufficiency, discuss housing policies
PAC 5	May 29	Refine housing recommendations



# Housing Market

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# Types of Housing

## Single-Family Detached

Single-family detached  
Manufactured & mobile homes  
Cottage Housing



## Multifamily (2+ Units per Structure)

Duplexes  
Tri- and 4-Plexes  
Apartments – owner & renter occupied

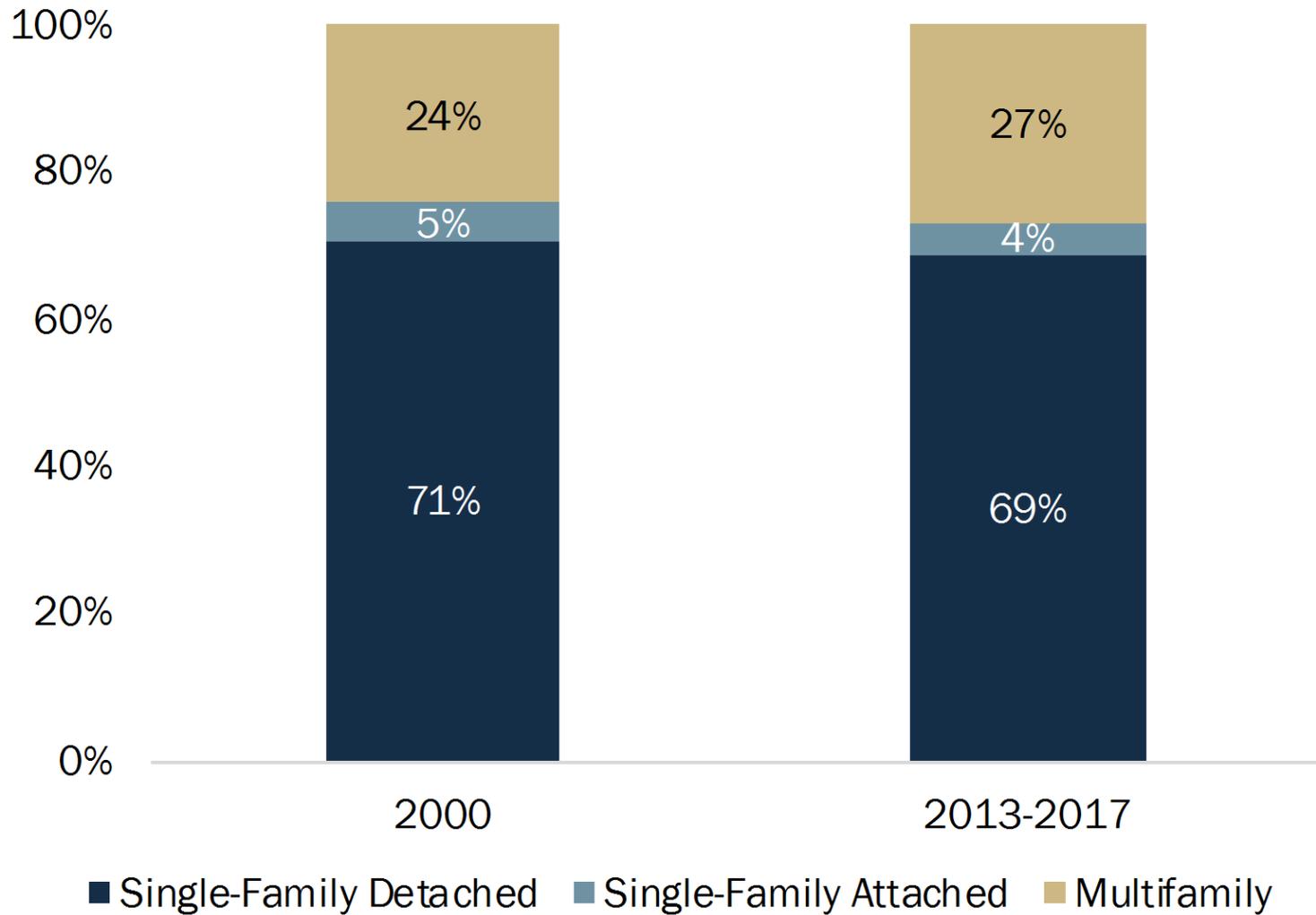


## Single-Family Attached

Townhouses

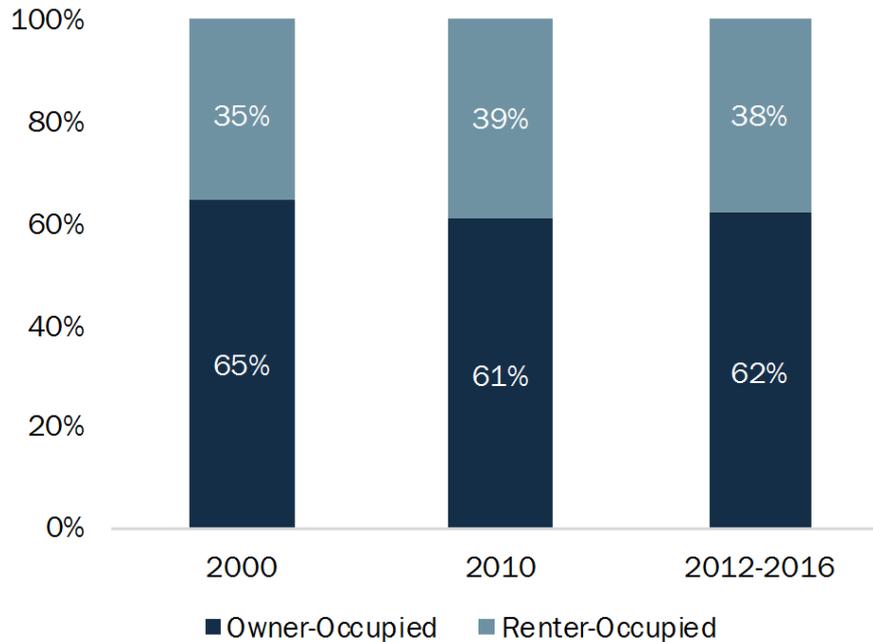


# Housing Mix, Keizer

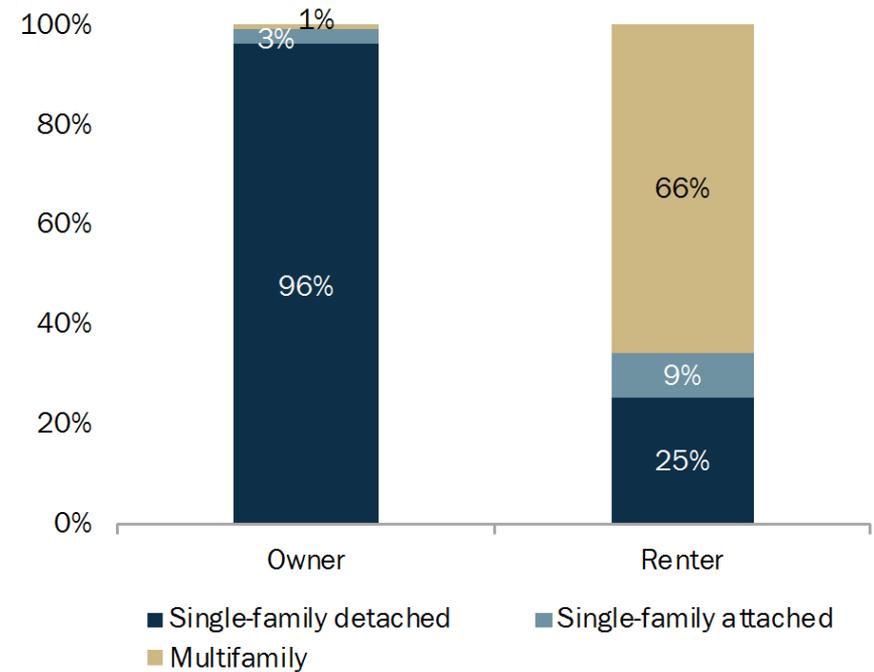


# Housing Tenure, Keizer

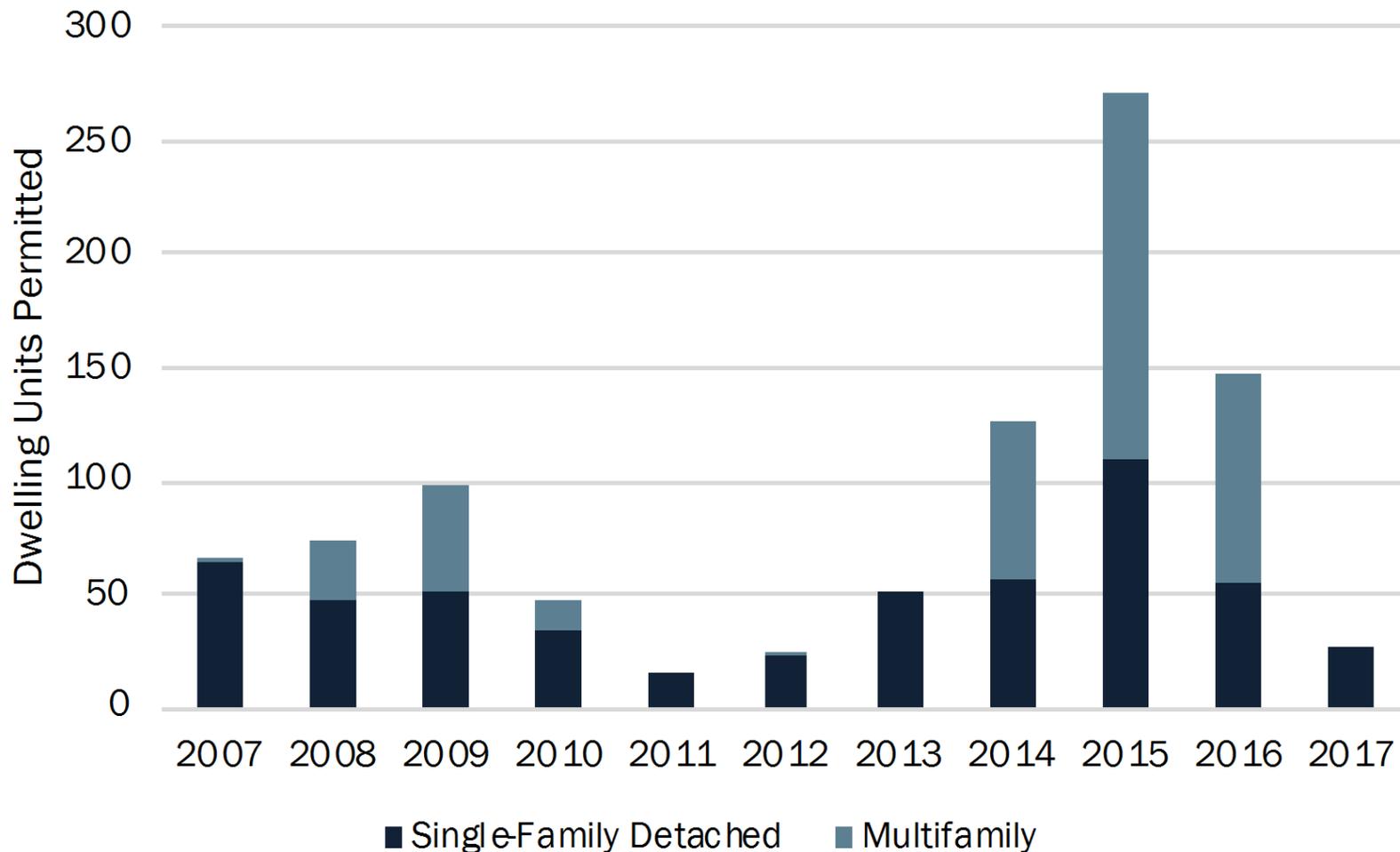
## Change in Tenure



## Tenure by Type of Unit, 2016

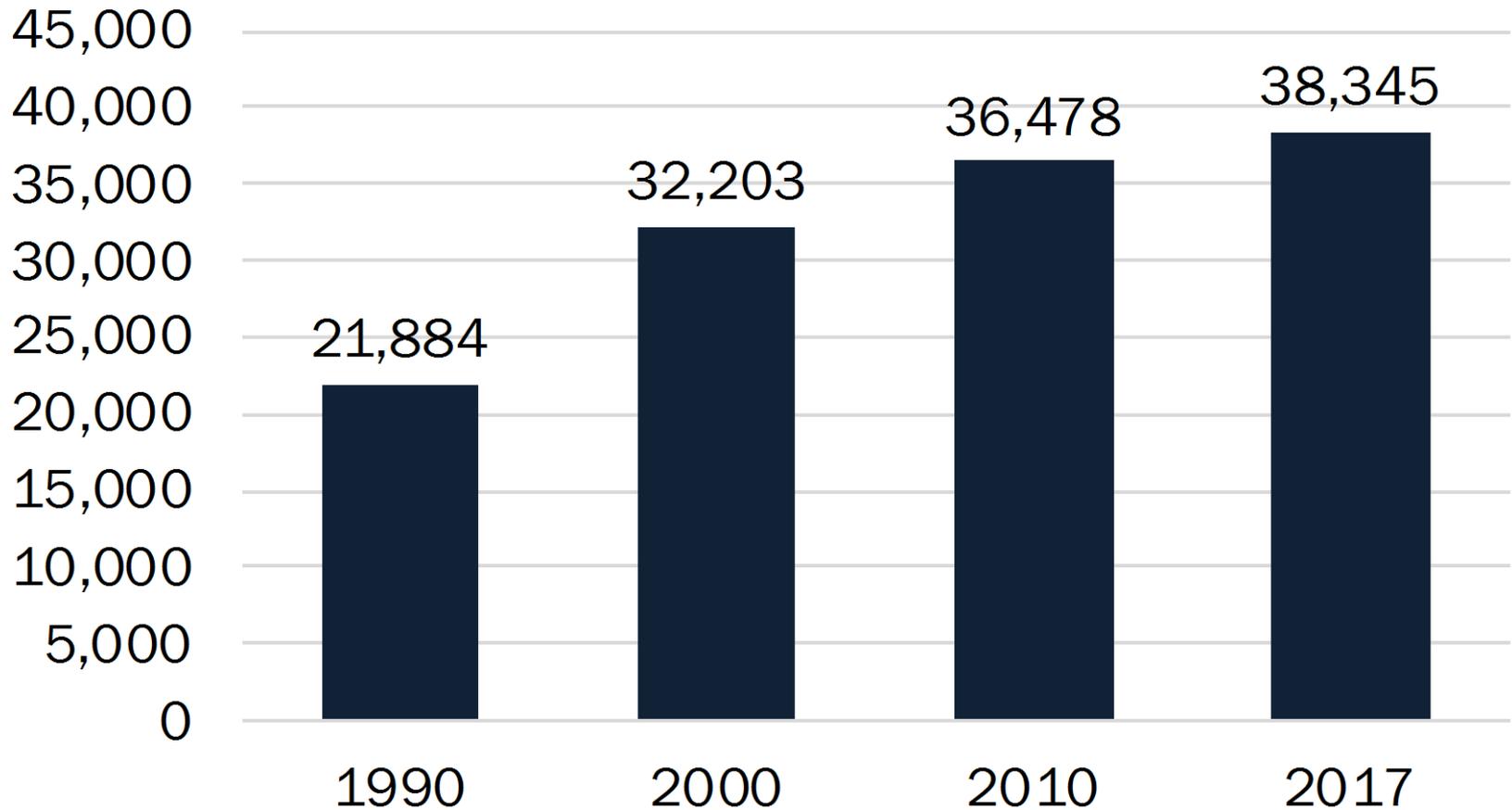


# Building Permits, 2007 to 2017



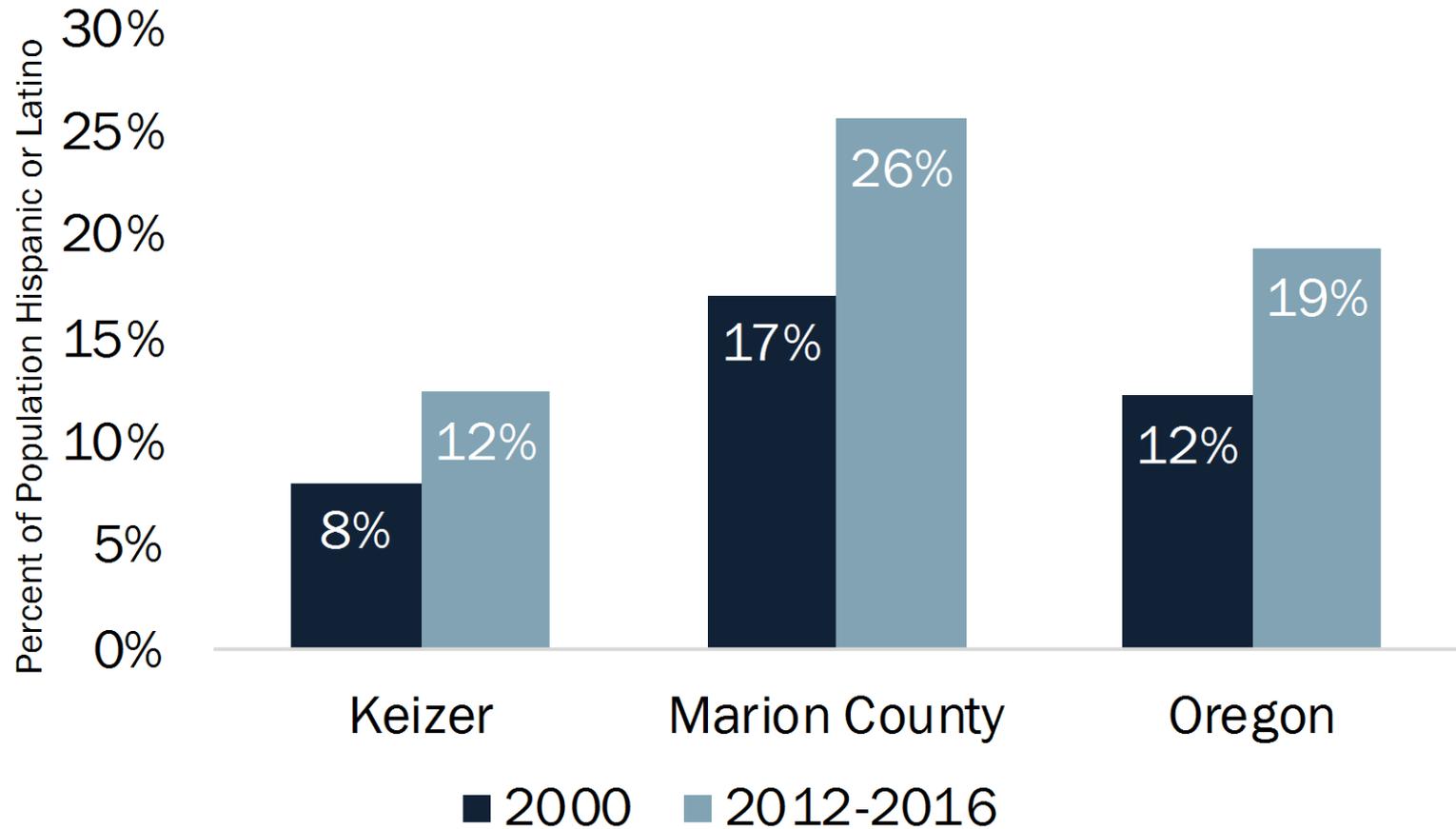
Source: City of Keizer Building Permit Database

# Growing Population, Keizer



Source: U.S. Decennial Census 1990, 2000, and 2010 and PSU Population Estimate 2017

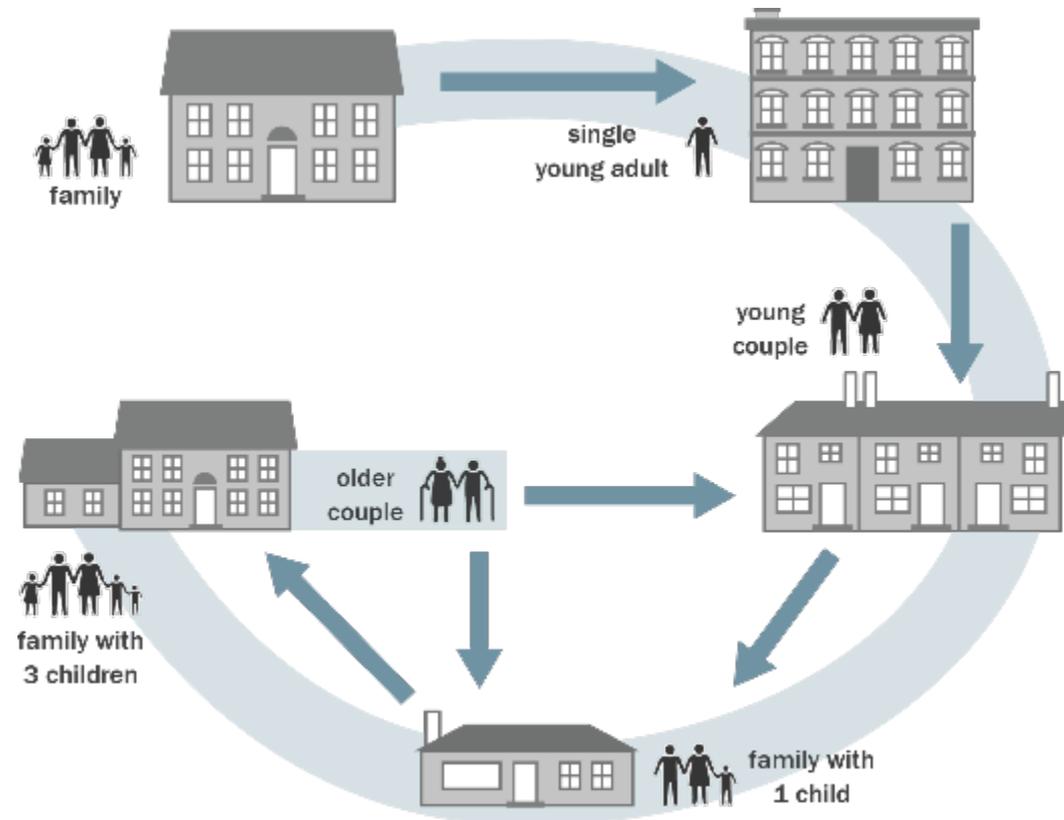
# Growth in Latino Population



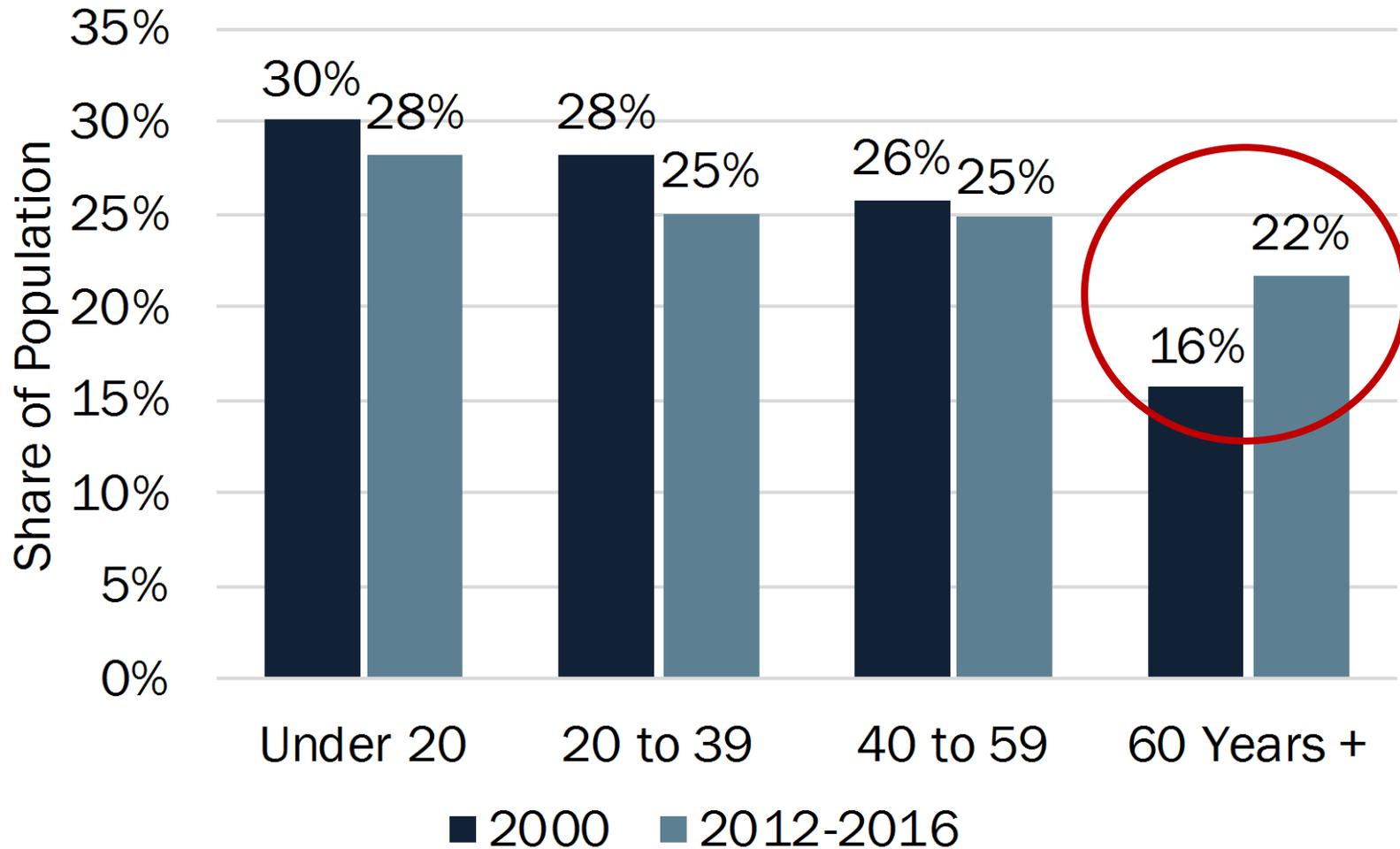
Source: U.S. Census, Decennial Census 2000 and ACS 2012-2016, Table P008 and B03002.

# Factors that will affect housing demand in Keizer over the 2019-2039 period

- Age
- Household Composition
- Income

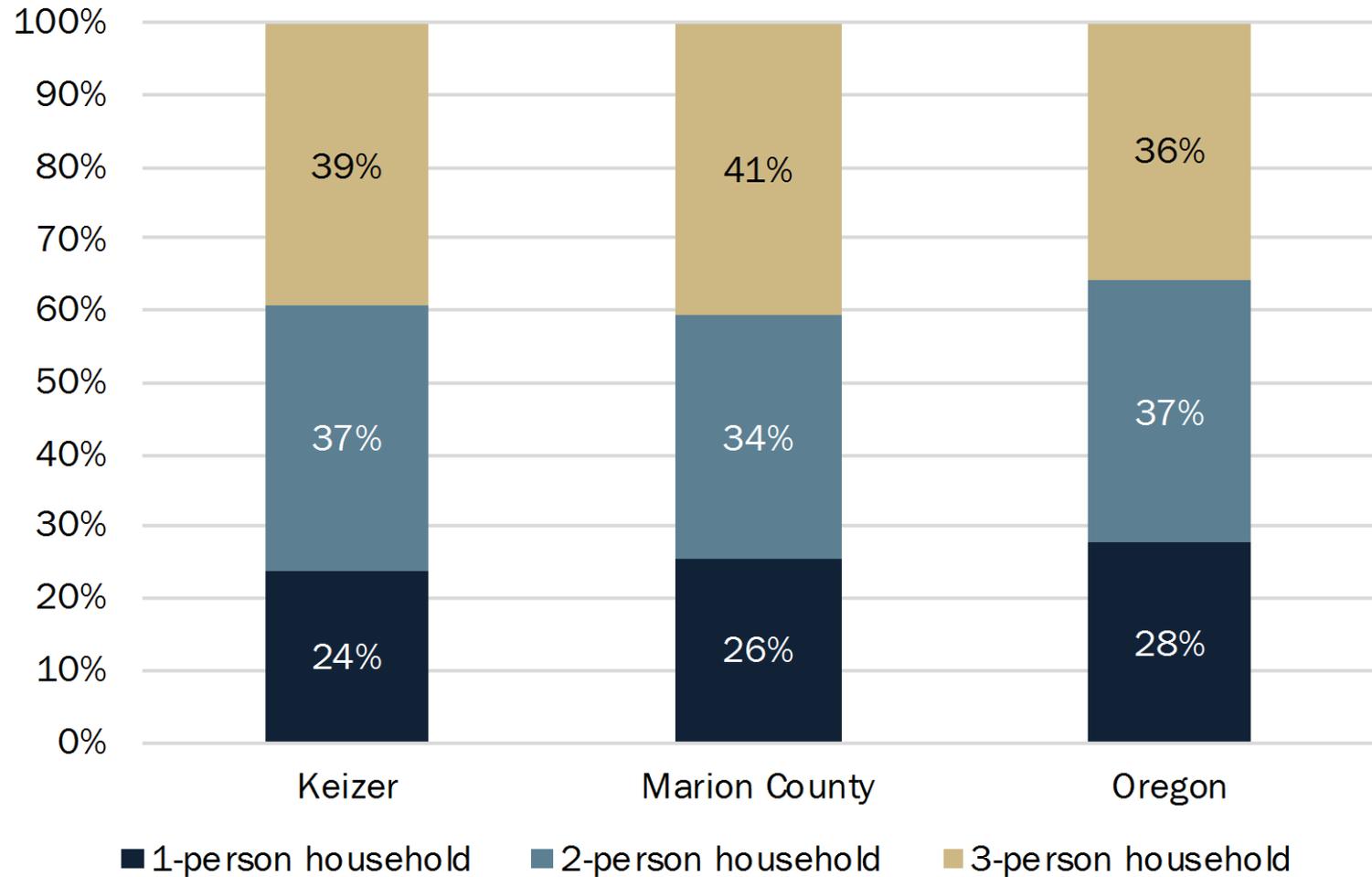


# Aging Population, Keizer



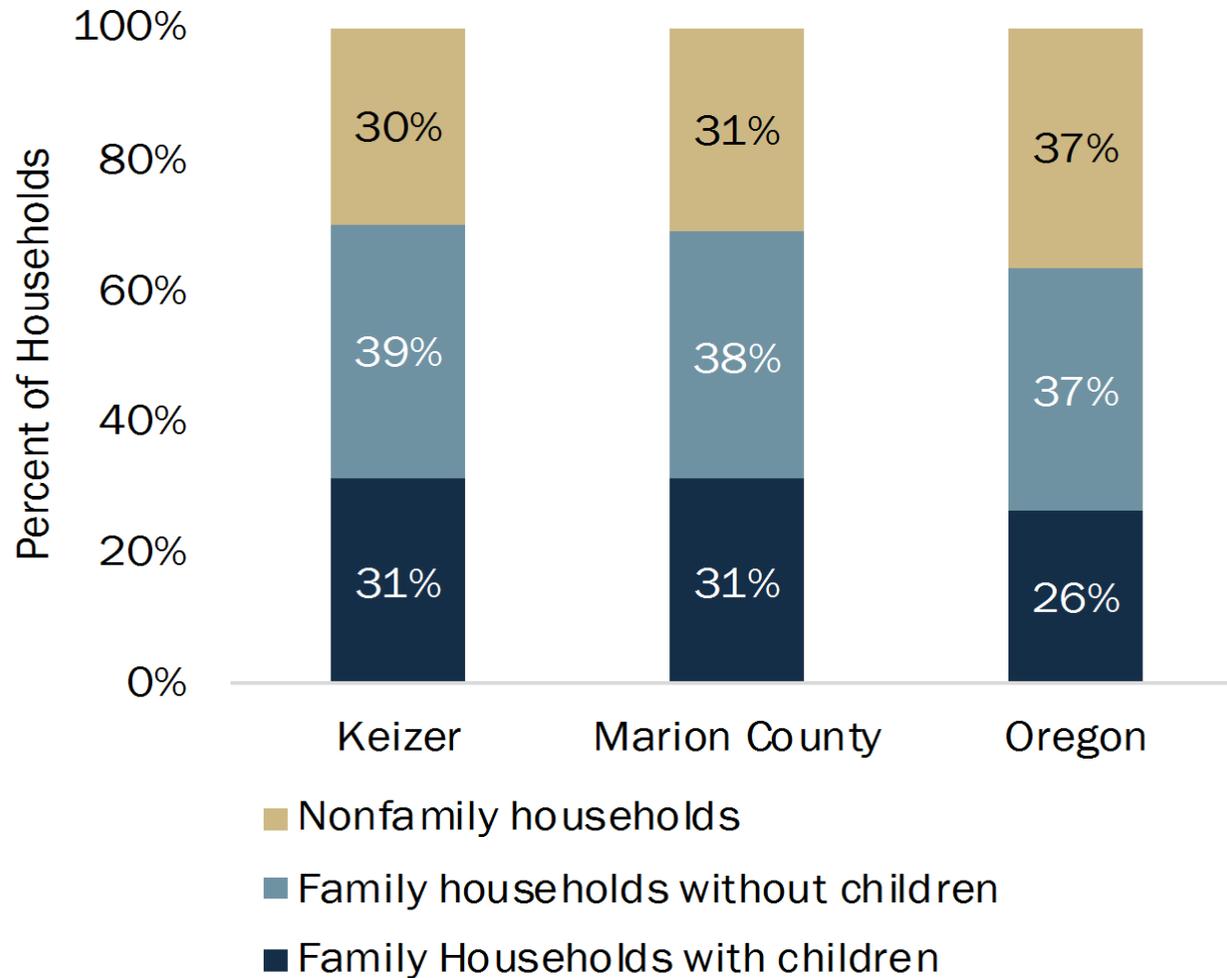
Source: U.S. Census, Decennial Census 2000 and ACS 2012-2016

# Household Size, 2013-2017 period

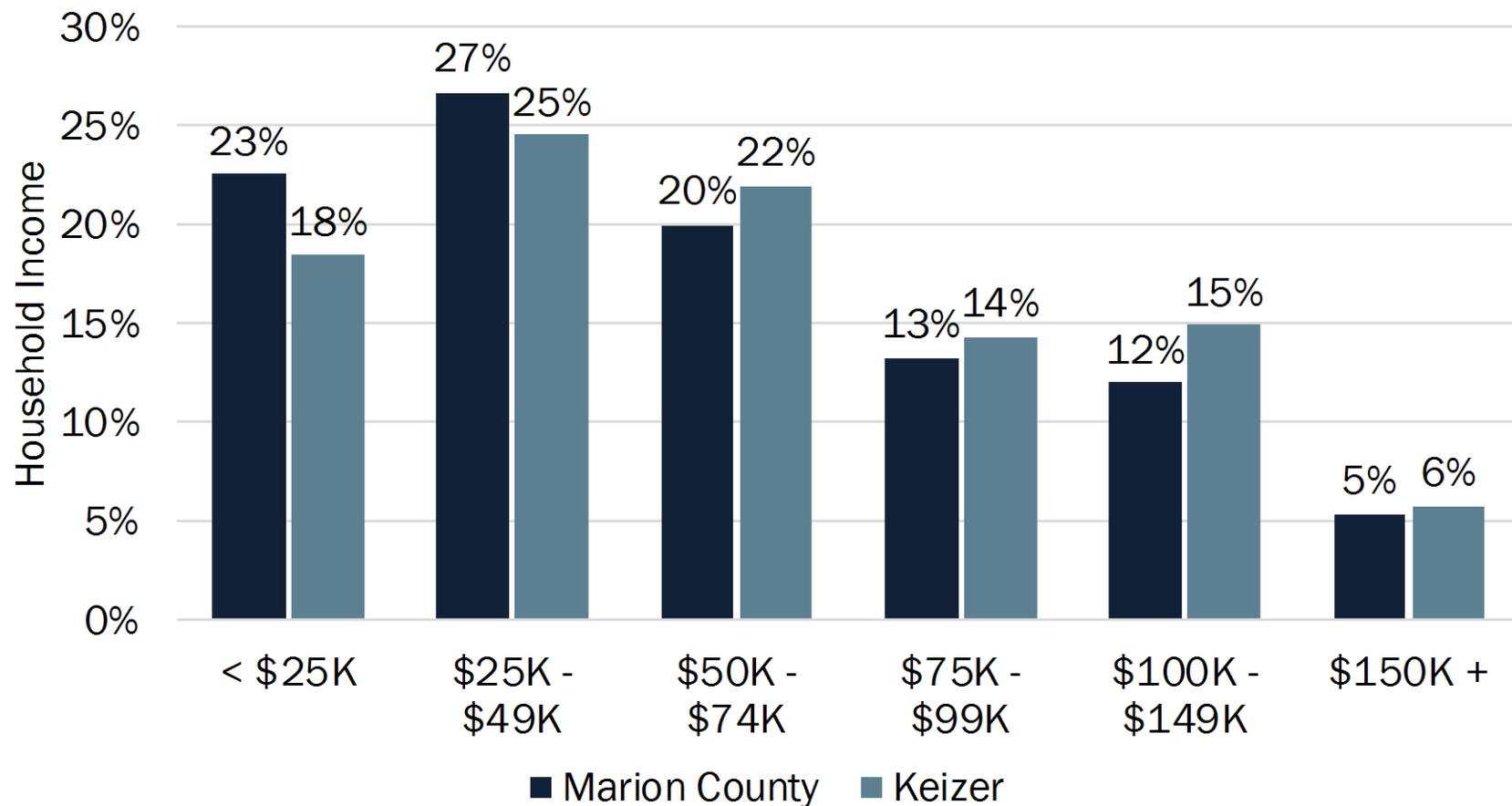


Source: U.S. Census, Decennial Census 2000 and ACS 2013-2017

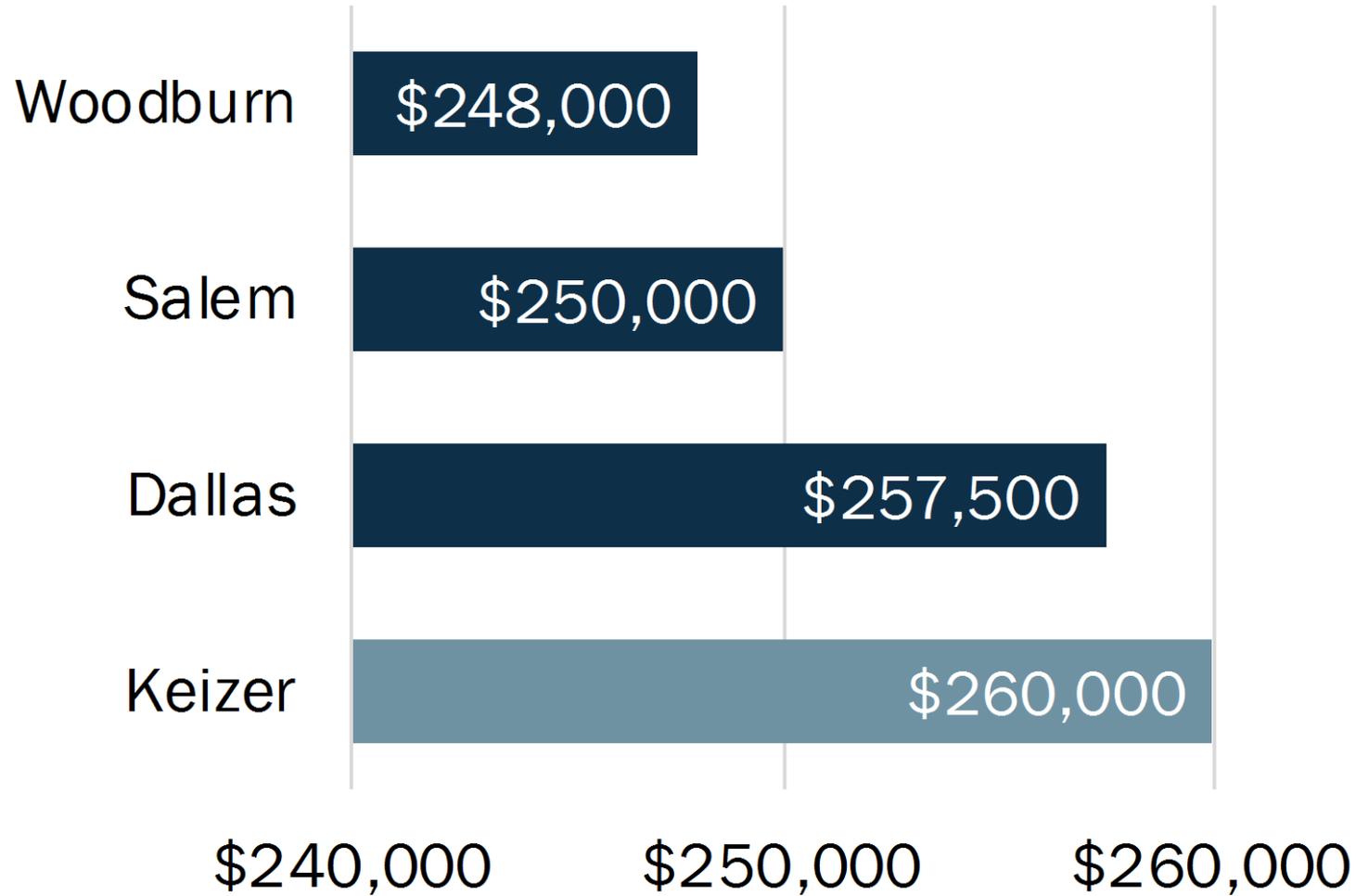
# Household Composition, 2012-2016



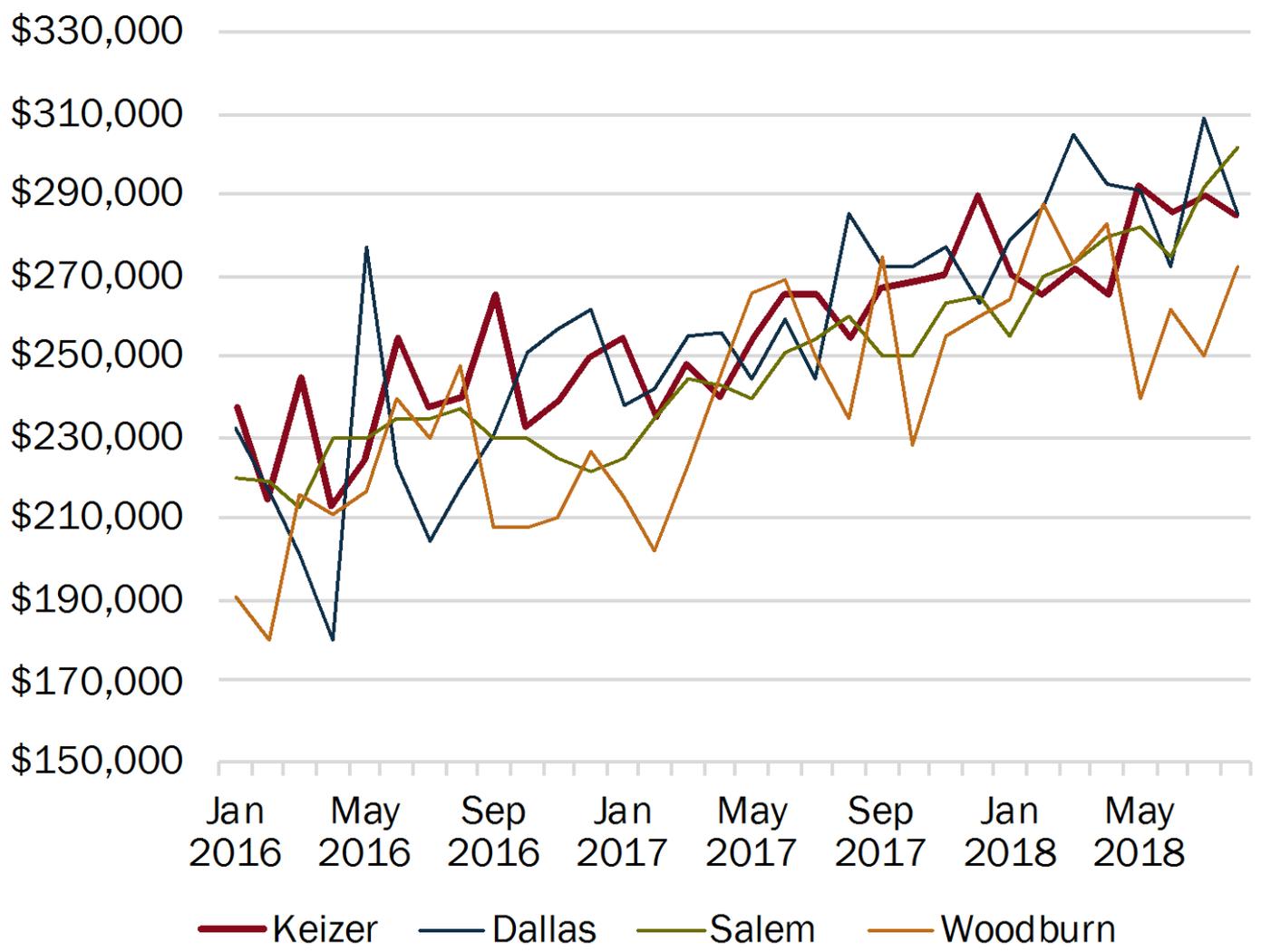
# Household Income, 2012-2016



# Median Home Sales Price, 2017

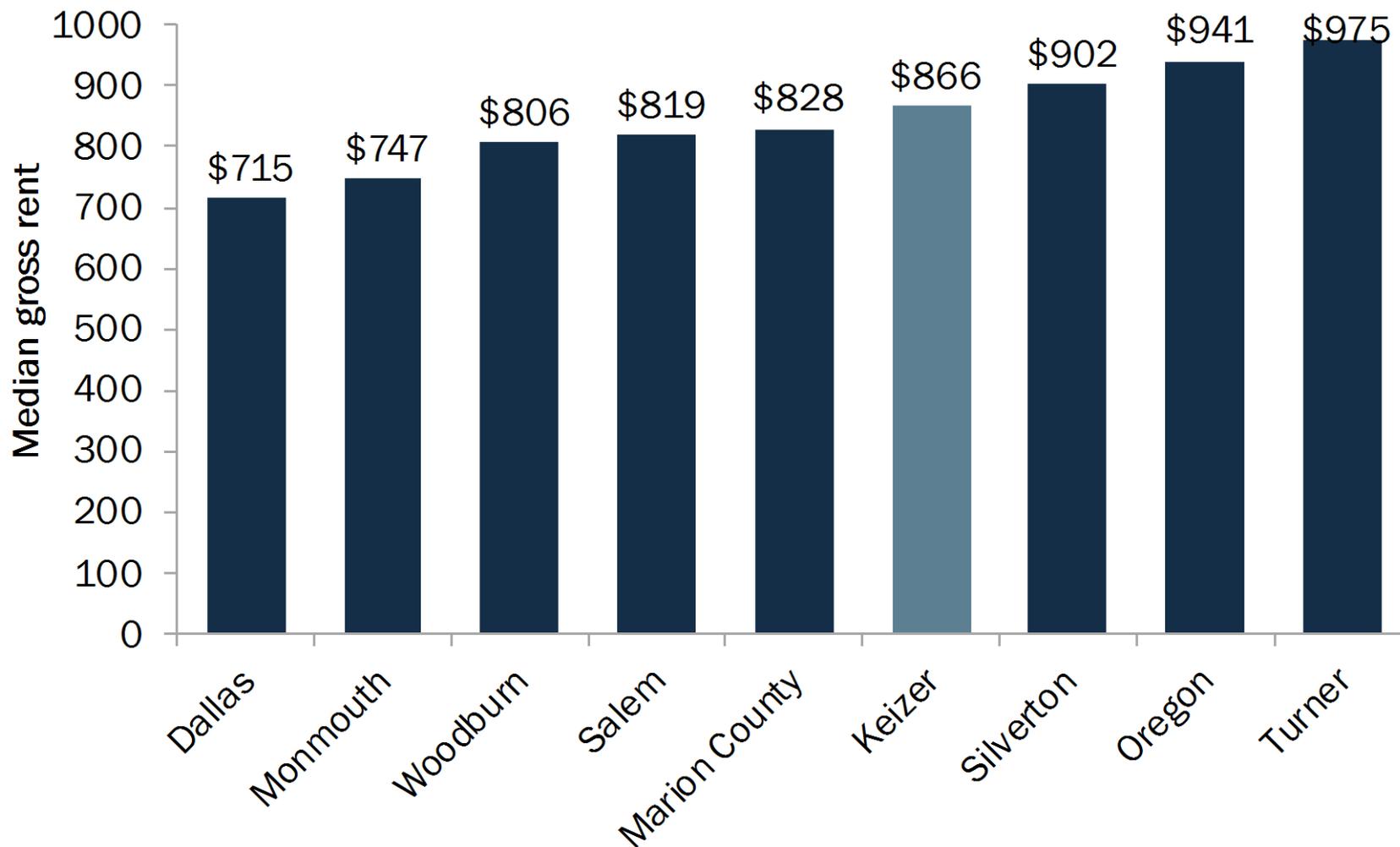


# Median Home Sales Price, January 2016 to August 2018



Source: Redfin.

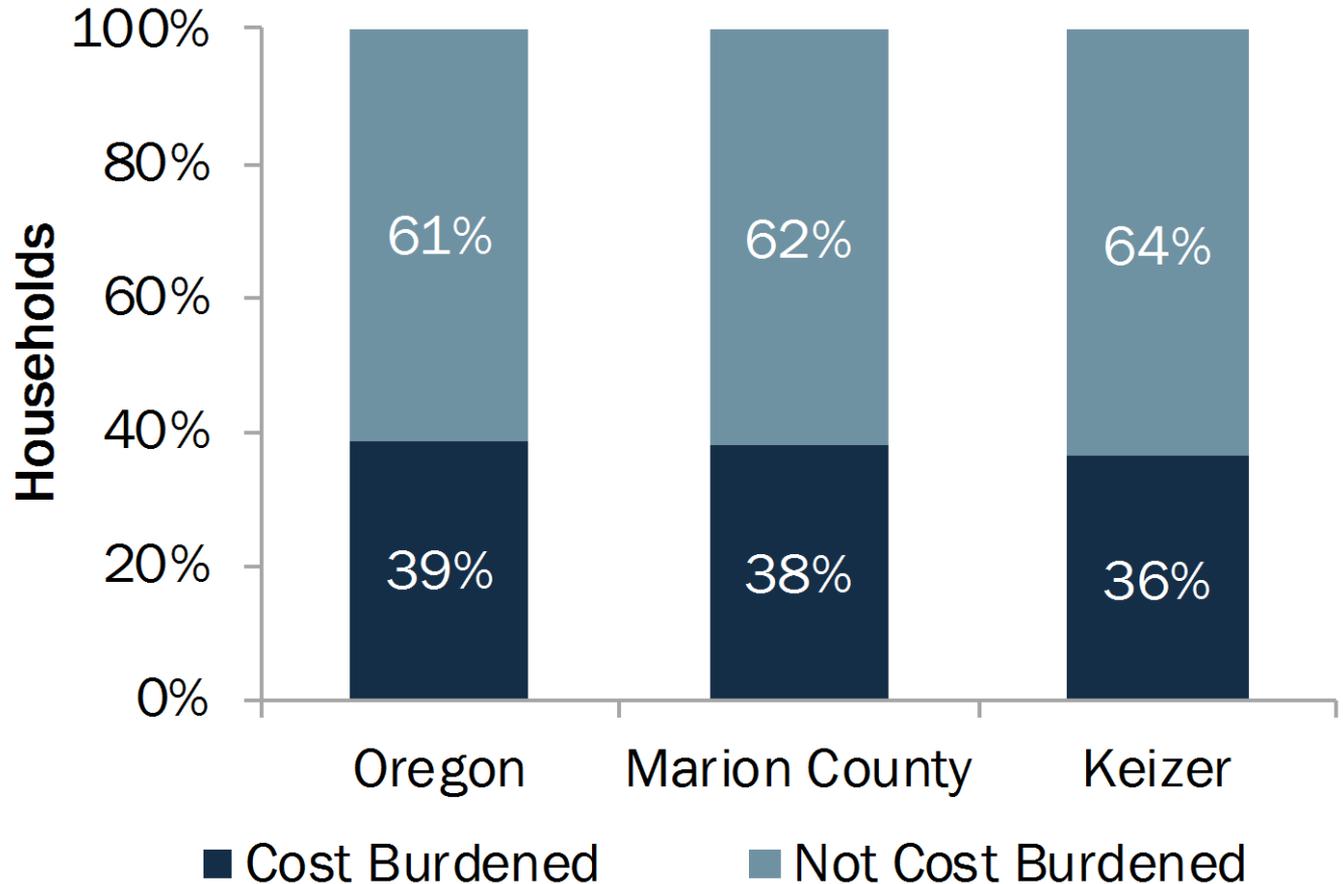
# Median Rent, 2012-2016 Period



Source: U.S. Census, ACS 2012-2016, Table B25064.

# Cost Burden, 2012-2016 Period

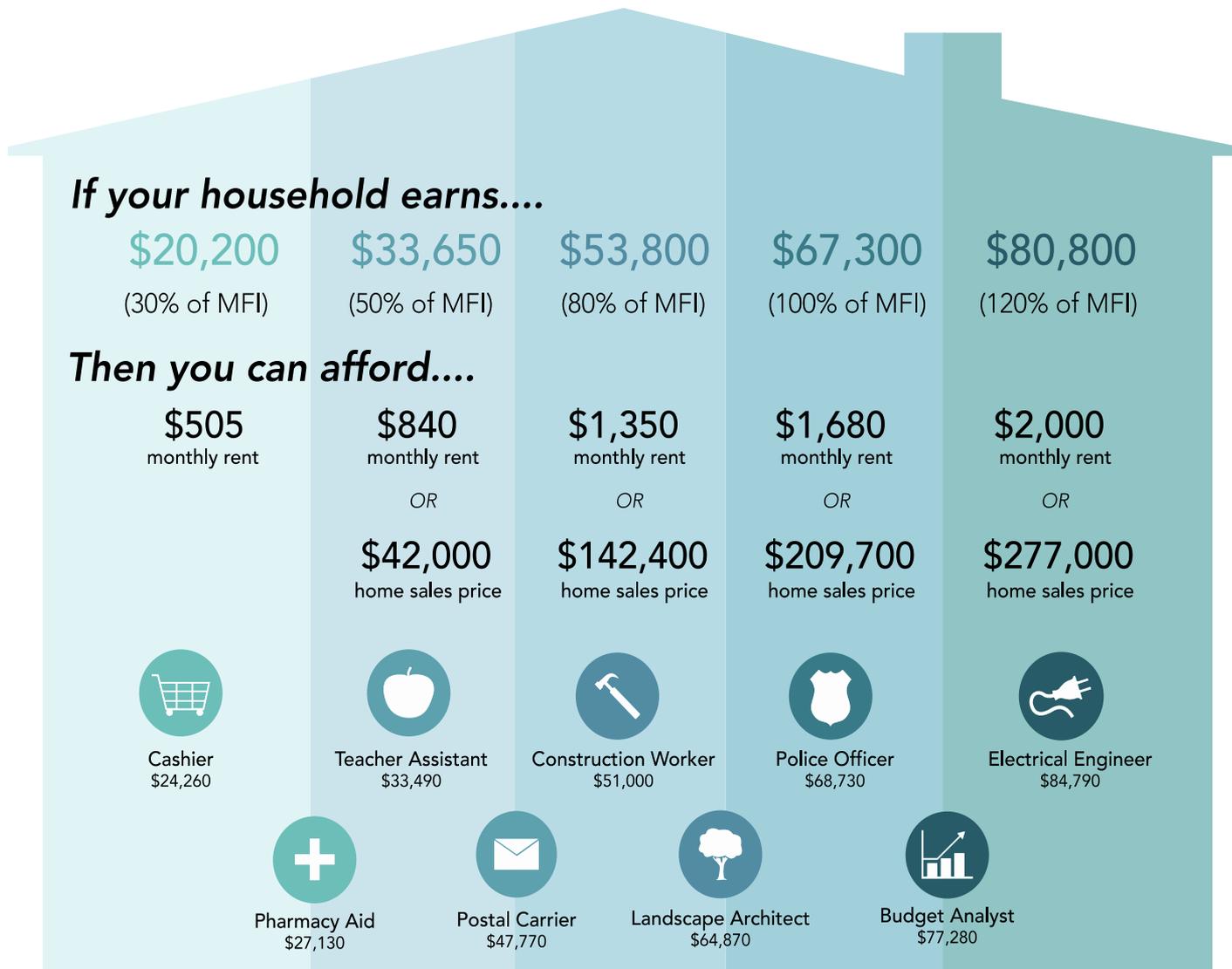
Households paying 30% or more for housing costs are said to be cost burdened.



Cost Burden in Keizer:

- Renters: 54%
- Owners: 25%

# Financially Attainable Housing



Source: U.S. Department of Housing and Urban Development, Marion County, 2018. Bureau of Labor Services, Salem MSA, 2018.



# Preliminary Housing Forecast

# Population Forecast, Keizer's Portion of

Year	Population
2019	39,395
2039	49,318
Change 2019 to 2039	
Number	9,923
Percent	25%
AAGR	1.13%



Source: Population Research Center, PSU. Note: Population forecast determined in collaboration with the Department of Land Conservation and Development, the City of Keizer, and the City of Salem.

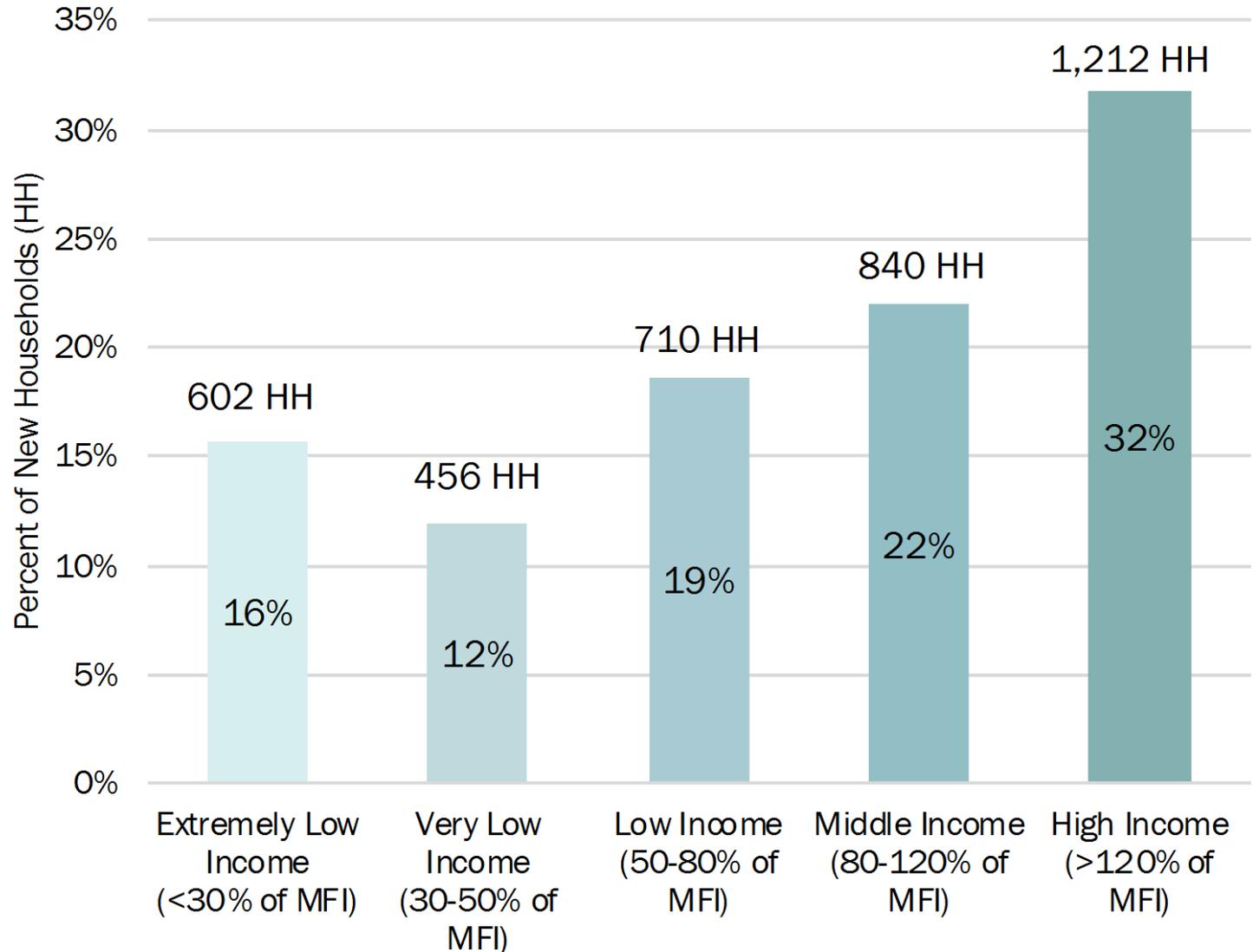
# Forecast of Housing Growth, 2019 to 2039

Variable	New Dwelling Units (2019-2039)
Change in persons	9,923
<i>minus</i> Change in persons in group quarters	94
<i>equals</i> Persons in households	9,829
Average household size	2.69
New occupied DU	3,654
<i>times</i> Aggregate vacancy rate	4.6%
<i>equals</i> Vacant dwelling units	166
<b>Total new dwelling units (2019-2039)</b>	<b>3,820</b>
<b>Annual average of new dwelling units</b>	<b>191</b>

# Forecast by Housing Type, 2019 to 2039

Variable	Baseline	
	Historical Housing Mix	Preliminary Needed Mix
Needed new dwelling units (2019-2039)	3,820	3,820
Dwelling units by structure type		
Single-family detached		
Percent single-family detached DU	69%	60%
<i>equals</i> Total new single-family detached DU	2,630	2,292
Single-family attached		
Percent single-family attached DU	4%	7%
<i>equals</i> Total new single-family attached DU	170	267
Multifamily		
Percent multifamily	27%	33%
Total new multifamily	1,020	1,261
<i>equals</i> Total new dwelling units (2019-2039)	3,820	3,820

# New Dwelling Units by Income, 2019 to 2039



Source: U.S. Census, American Community Survey 5-year Estimates, 2012-2016.

# Implications for Housing Needs

- Growth in older households will result in more one-person households and additional demand for smaller units, for ownership and rental as well as assisted living facilities
- Growth in households with families (Millennials) will result in demand for comparatively affordable units, for ownership and rental
- Some households lack housing that is affordable; relatively few households can afford sales prices
- Demand for greater range of housing types

# HNA: What types of housing?



# Next Steps

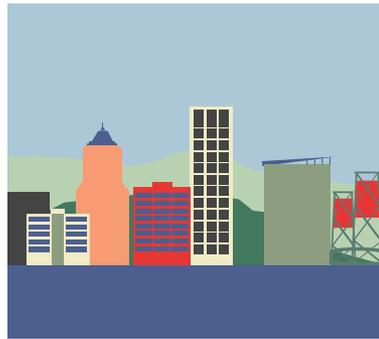
- Refine Housing Needs Analysis
- Draft Buildable Lands Inventory
  
- PAC Meeting 2: February 20 @ 5:30 – 6:30 PM
- Open House 1: February 20 @ 7 – 8 PM

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