NewHomeTrends
DATA•RESEARCH•CONSULTING

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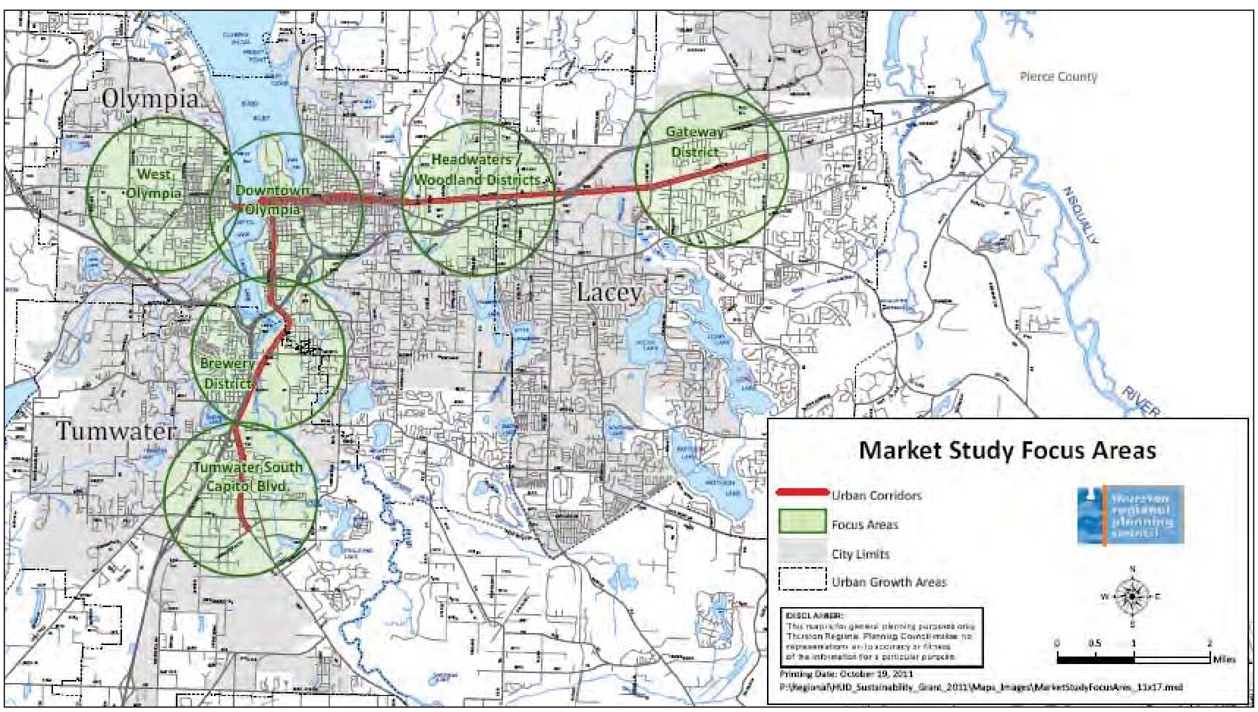
Thurston Regional Planning Council Corridor Demand Report

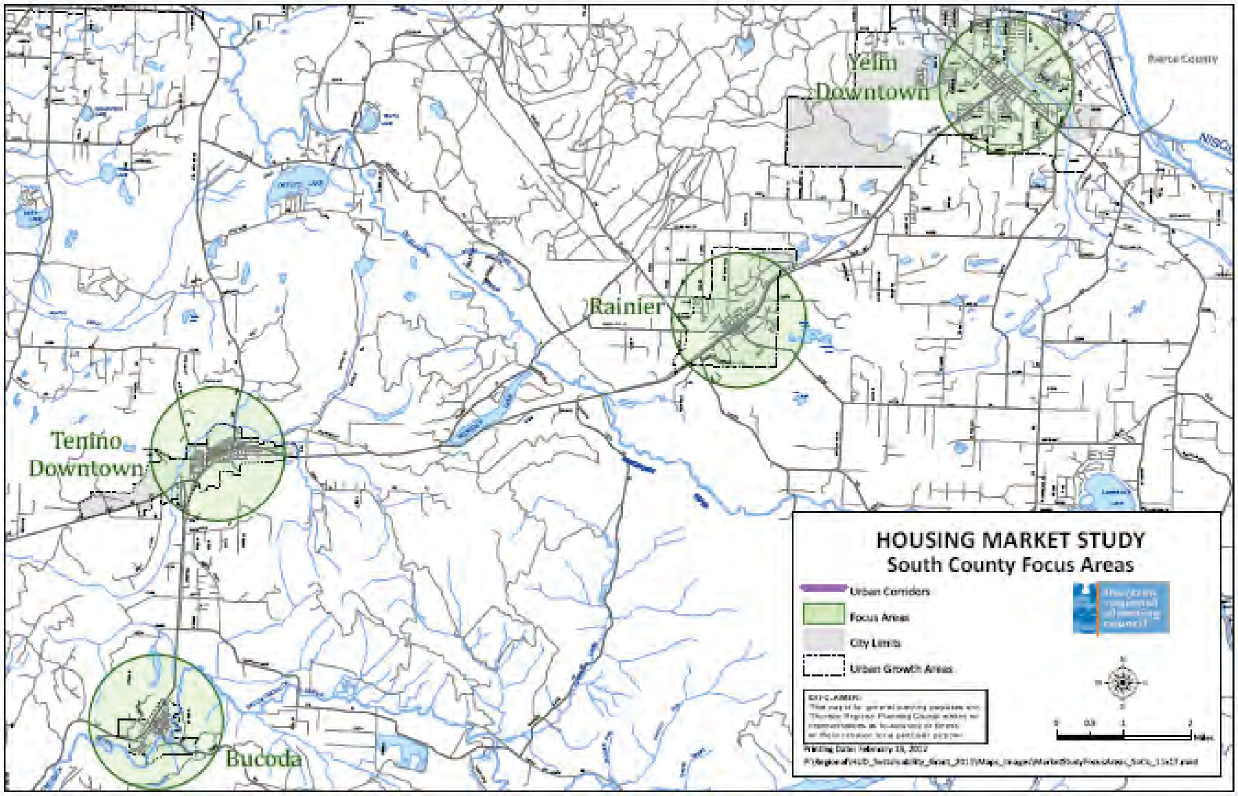
New Home Trends, Inc. was contracted by Thurston Regional Planning Council in June 2011 to identify current and future multi-family demand within 10 designated Focus Areas each covering a 1-mile radius in Thurston County. The Focus Areas are identified as:

- Gateway District
- Headwaters/Woodland District
- Downtown Olympia
- West Olympia
- Brewery District
- Tumwater South Capitol Boulevard
- Tenino
- Rainier
- Yelm
- Bucoda



Source: TRPC

The data collected and used in the analysis was gathered by New Home Trends between June 2011 and December 2011.`



Source: TRPC

- Each Focus Area was broken into six topic areas:
- Population and Attributes
- Projected Housing Demand by Density/Product Type
- Population, Housing Characteristics
- Current and Future Housing Supply
- Community Characteristics.

The data sources used for the analysis have been identified on the spreadsheets for both the Counties and Corridors, along with comments on how we arrived at the numbers and other information we felt critical for the maximum use of this document. Sources used included:

- US Census
- ACS Housing Summary
- ACS Population Summary
- Office of Financial Management (OFM)
- Thurston Regional Planning Council
- New Home Trends, Inc.
- ESRI 50+ Profile
- Northwest Multiple Listing Service
- ESRI
- Walk Score

Prior to completing the work for the Focus Areas, we were tasked with providing a supply versus demand study for both Pierce and Thurston Counties for housing between 2010 and 2040. The information on the Pierce and Thurston County Supply and Demand Spreadsheet identified (located in separate attached file):

- Projected housing demand for both Pierce and Thurston Counties based on projected population growth from US census data as well as Thurston Regional Planning Council.
- The supply of both new single and multi-family that could come out of the pipeline within the next five years.
- The average time for developments to come out of the pipeline.

Once the Pierce and Thurston County Supply and Demand Spreadsheet was completed, a spreadsheet for each Focus Area was completed showing characteristics of each Area that identified:

- Demographics of each Focus Area
- Attributes of each Focus Area
- Projected population growth for each Focus Area
- Projected new housing demand for each Focus Area
- Amenities needed to draw developers, builders and residents to each Focus Area
- Types of multi-family that will work in each Focus Area
- Timing of multi-family housing for each Focus Area
- Low medium or high price points of multi-family housing for each Focus Area

The final step was to complete a Corridor Comparison spreadsheet to identify similarities and differences in each Focus Area to determine the housing demand, community amenities needed for success and sequence of development for the Focus Areas.

The findings on the following pages are broken into two sections:

- Key findings for Thurston County
- Key findings from the Thurston County Focus Area Study

Following the key findings are the back-up and supporting material which include:

- Pierce and Thurston County Supply and Demand Data
- Focus Area Comparison Spreadsheet
- Individual Focus Area Characteristics
- ACS Housing and Population Summaries
- New Home Trends Development Summaries
- Population Lifestyle Segmentation (AKA Tapestry Descriptions)

Figures in the tables and text may vary slightly, as the New Home Trends, Inc. database is updated constantly and the information used in the research may be captured at different points in time.

Thurston Regional Planning Council County and Corridor Findings:

KEY FINDINGS FOR THURSTON COUNTY

- Between 2010 and 2030 Pierce County is projected to need an additional 83,000 residential units while Thurston County is projected to need an additional 55,000 residential units. These numbers are rounded.

- Today, in Thurston County there are 18,740 proposed new dwelling units (lots and multi-family units) in the pipeline with another 3,000 recorded finished vacant lots available to build on. Combined proposed and recorded lots and units amounts to 21,740 which is enough potential inventory to meet the projected housing demand for the next ten years.

- In September 2011 of the proposed lots and units in the pipeline 53% were located in the 15 largest developments listed below. Only two; Lacey Gateway and Bellatore Mixed Use are located within the six Focus Areas in North County.

Plat Name	Jurisdiction	# of Lots	Typ. Lot Size	Status	App. Date	Hearing Date	Prelim Appr. Date
Britton Place	Lacey	248	3,000	Prelim. Approval	Feb-07	Apr-07	Dec-07
Freestone Ridge	Thurston County	938		Review	Nov-11		
Jubilee	Lacey	212	1,650	Prelim. Approval	Jul-06	May-07	Jun-07
McAllister Springs	Thurston County	264	6,600	Prelim. Approval	Oct-03	Feb-07	Apr-07
Rancho Serino	Thurston County	317	2,700	Prelim. Approval	Jun-05	Jan-06	Dec-06
Sienna 2	Thurston County	206	4,950	Prelim. Approval	Apr-07	Jul-11	Aug-11
Silver Hawk	Thurston County	300	35,000	Prelim. Approval	May-06	Sep-05	Oct-05
Steilacoom Ridge	Thurston County	325		Review	Dec-04		
Tahoma Terra	Yelm	611	5,500	Prelim. Approval	Mar-05	Jul-05	Aug-05
Thurston Highlands	Yelm	5,000		Litigation	Apr-06		
Bellatorre Mixed Use	Tumwater	237	High Rise	Prelim. Approval	Apr-05		
Briggs Village Senior Housing	Olympia	200	Low Rise	In for Permit	Mar-99		
Lacey Gateway	Lacey	500	Low Rise	In for Permit			
Stonegate Apartments	Tumwater	226	Low Rise	In for Permit	Jun-08		
Woodland Apartments	Olympia	224	Low Rise	Prelim. Approval	May-08		
Total Plats 15		9,808 Total					

- There were 21,740 proposed and recorded vacant single family lots and multi-family units in September 2011 in Thurston County. Of these 21,740 less than 1,939 are located within the six Focus Areas within North County. Leaving 92% of the proposed new dwelling units in Thurston County outside of these the ten Focus Areas.

- As of September 1, 2011 the supply and projected housing demand for Thurston County breaks down as follows for the next ten year period 2010 – 2019. This was a moving target as the housing demand data was in the process of being changed with the new ACS numbers and the proposed and remaining lots vary slightly because of the date of collection; in the spreadsheet the data collection date was July 2011 and the data below was gathered in September 2011.

Product Type	Proposed & Remaining Recorded Lots on the Market 9/2011	Projected Housing Demand 2010-2019	Permits Issued 2000-2009
Single Family Detached	16,865	17,074	16,610
Multi-Family	4,875	8,954	2,460
TOTAL	**21,740**	**26,028**	**19,070**

- We estimated that during the next 10 year period only 75% of the units and lots in the pipeline will be permitted reducing the proposed and remaining lots and units on the market to 16,305 instead of the 21,740.

- The projected demand for new multi-family housing will be significantly higher between 2010 and 2020 than the 2000 to 2009 period. Over the past ten years (2000 – 2009) there was a total 2,460 multi-family permits issued in Thurston County.

- The following are several of the reasons for the historical lack of apartment and multi-family construction in Pierce and especially Thurston Counties:

1. The affordable price of single family housing has been a competitive factor for multi-family housing keeping rents relatively low.

2. Development money has been slow to flow to multi-family apartments because the land prices have been high compared to the low rents (the numbers just haven't worked).

3. Impediments to building multi-family include the high cost of fees, parking issues, the mixed use criteria and neighborhood opposition.

4. Consumers had confidence in the market and were more likely to choose homeownership than rentals.

5. Cost of re-development runs high making multi-family housing often times unaffordable to the majority of the population.

Multi-family Housing

Multi-family housing in Thurston County has been historically volatile, peaking roughly every four years. Although the demand for condominiums will likely be flat for the next 10 years due to lack of financing, the demand for apartment housing will change sometimes up and sometimes down over the next few decades for the following reason:

1. Between 2010 and 2019 the demand will be highest for all age apartments simply because most lenders will not lend for vertical financing on condominiums or single family detached. The majority of vertical financing for new single family detached housing is being done through private funding. With the current recession many families have lost their homes and will need to rent until they clear their credit, this could take up to seven to ten years.

2. Purchasing a single family house has and will become harder because of the new regulations.

3. Lenders are not willing to finance condominium projects, however they are willing to finance new apartment construction. The majority of the multi-family in the permitting process which was slated to become condominiums will now be built as apartments and converted to condominiums when that market returns in 5 to 10 years.

4. The government is encouraging apartment development and construction rather than homeownership.

5. Changing demographics; people who live in multifamily housing are typically younger (18 – 30) and older (55 +). For the young it is because they are establishing themselves before they buy a home, for seniors it is a lifestyle choice.

6. A new survey put out by Met Life Mature Market Institute in January 2011 gives the following breakdown on single family versus multi-family and owners versus renters:

	Households under 55	**Households over 55**
Single Family Owners	54.31%	70.56%
Single Family Renters	11.79%	5.04%
Total Single Family	**66.10%**	**75.60%**
Multi-Family Renters	27.57%	15.38%
Multi-family Owners	6.33%	9.01%
Total Multi-Family	**30.90%**	**24.39%**

7. There will be more transit Focus Areas which will encourage transit riders which in turn will or should encourage higher density developments within walking distance to these transit Focus Areas.

8. For many today the idea of renting is more appealing than the idea of owning a home with the risk of losing it. Confidence in the ownership market will return but it will be at least ten years.

9. Jurisdictions are willing to look at and change their zoning laws to increase density to meet their growth management projections.

As rentals gain favor over the next two decades the types of rentals will evolve from the three story woody walkup buildings with 2 car exterior parking stalls per unit to the following:

1. Townhomes with attached garages, suburban and urban in style, these will be convertible to condominiums once that market returns.

2. Age restricted and age targeted low and mid-rise independent rental buildings in urban location. There will be some smaller builders in more suburban location, however, the preference will be for more urban locations where services are more readily availble.

3. Low (1-3 story buildings) and mid rise (4-6 story buildings) in suburban and urban locations targeting singles.

4. High rise (defined as steel and concrete buildings typially over 9 stories) in urban locations within walking distance to everything; jobs, shopping and recreation targeting professional singles and couples of all ages with no children.

Senior Housing

- With the senior population (over 65) rising over 100% between 2010 and 2040 in Thurston County there will be significantly more demand for senior housing in the future. These aging baby boomers will force developers to design innovative, newer and better housing for seniors, including:

  More group homes for people with shared lifestyles.

  More shared housing with their children utilizing ground related accessory dwelling units with kitchens will become more in demand.

- The Thurston County senior housing demand started in 2010 but will be highest between 2020 and 2030 for independent living, assisted living and memory care units simply because of the demographics.

- In the near future existing single family detached homeowners will want the opportunity to add an accessory dwelling unit that is ground related (a unit that enter at ground level, not located above the garage with a full set of stairs) for an aging parent or a caregiver for themselves.

- As many of the seniors in Thurston County currently live in suburban and exurban areas the amenities that will attract these seniors to move to the Focus Areas are:
    a. Medical facilities
    b. Public transportation
    c. Safe neighborhoods
    d. Close to medical
    e. Good sidewalks
    f. Neighborhood shopping
    g. Close to public services
    h. Close to leisure activities
    i. Close to families
    j. Parks and recreation
    k. Restaurants

Military Impact

- As with the rest of the region, Thurston County has felt the downturn in the housing market; however, it has fared better than the rest of the region as a whole, in terms of months of spec inventory, unemployment rates and depreciation of home values, partly due to Joint Base Lewis McChord (JBLM) and government employees. The first-time buyer has been driving sales in the region as well as Thurston County.

- In Thurston County, the military accounts for a large percentage of the buyers and has kept the market in better shape than King, Pierce and Snohomish counties, especially as troops returned home from the war. According to Deputy Garrison Commander at JBLM the number of military and dependents will increase by 40,800 between 2008 and 2015 in Thurston County, much of this increase has already happened. It is estimated that 75 percent of the military population live off base with 14,364 in Thurston County.

- JBLM does not provide growth projections beyond two year periods due to changes in administration, however according to a Technical Memorandum by RKG, who conducted a Housing Needs Assessment for JBLM, between 2010 and 2016 there will be an estimated 2,126 soldiers and related family members who will seek housing in areas located off the base.

- According to Washington State Employment Security, state and local government account for roughly 30% of all jobs in Thurston County.

Affordability

- In Q4 2010 The Housing Affordability Index (HAI) in Thurston County had an affordability index of 162.0 indicating affordability in the county. The first time HAI was at 92.9 also indicating affordability. The HAI measures the ability of a typical family to make payments on a median priced resale home. It assumes a 20% down payment and a 30-year mortgage. When the index is 100, there is a balance between the family's ability to pay and the cost of the home. The index of 162.0 indicates housing affordability for those with incomes at or above the median income level in the County. In other words, any index above 100 indicates housing affordability, where as indexes below 100 indicate less affordable housing.

- The HAI also provides a first-time buyer index. It assumes the purchaser's income is 70% of the median household income and the home purchased by first-time buyers is 85% of the area's median price. All loans are assumed to be 30-year loans. The first-time buyer index assumes a 10% down payment. It is assumed 25% of income can be used for principal and interest payments. In the Q4 2010 the first-time buyer HAI was at 92.9. Although not at 100, the first time buyer HAI is at its highest point since January 2007 when it was at 64.5. The average first time buyer index was 66.0 in 2008, and 81.7 in 2009 and 88.2 in 2010. The first time buyer index of 92.9 indicates a first-time buyer earning the median income does not have enough to purchase a median priced home.

- To interpret the indices, a value of 100 means that a family with the median income has exactly enough income to qualify for a mortgage on a median-priced home. An index above 100 signifies that family earning the median income has more than enough income to qualify for a mortgage loan on a median-priced home, assuming a 20 percent down payment. For example, a composite HAI of 120.0 means a family earning the median family income has 120% of the income necessary to qualify for a conventional loan covering 80 percent of a median-priced existing single-family home. An increase in the HAI, then, shows that this family is more able to afford the median priced home. The calculation assumes a down payment of 20 percent of the home price and it assumes a qualifying ratio of 25 percent. That means the monthly P&I payment cannot exceed 25 percent of the median family monthly income.

The following table breaks down the 2010 Thurston County households by age and income and what they can afford to either rent or buy based on their incomes:

Thurston County Age by Income

2010 Income Levels	Price of home they can afford based on industry standard of 20% down with 7% mortgage	Rental rates they can afford	Age Range						TOTAL
			25-34	35-44	45-54	55-64	65-74	75+	
Total # of Households by Age Range			17,241	17,886	21,957	19,548	10,580	9,406	*96,618*
Under $25,000	Under $90,000	$520 and below	2,835 16%	1,906 11%	1,844 8%	2,237 11%	2,443 23%	3,228 34%	*14,493* *15%*
$25,000-$49,999	$90,000 - $179,996	$520 - $1042	5,280 31%	4,159 23%	4,145 19%	3,794 19%	3,036 29%	2,815 30%	*23,229* *24%*
$50,000-$74,999	$180,000 - $269,996	$1042 - $1562	5,257 30%	5,370 30%	5,394 25%	4,768 24%	2,360 22%	1,558 17%	*24,707* *26%*
$75,000-$99,999	$270,000 - $359,996	$1563 - $2083	2,418 14%	3,403 19%	5,101 23%	4,000 20%	1,370 13%	931 10%	*17,223* *18%*
$100,000-$149,999	$360,000 - $539,996	$2083 - $3125	1,081 6%	2,420 14%	4,360 20%	3,468 18%	1,013 10%	573 6%	*12,915* *13%*
$150,000-$199,999	$540,000 - $719,996	$3125 - $4167	231 1%	374 2%	666 3%	805 4%	214 2%	217 2%	*2,507* *3%*
$200,000 - $249,999	$720,000 - $899,996	$4167 - $5208	96 1%	135 1%	250 1%	280 1%	106 1%	70 1%	*937* *1%*
$250,000-$499,999	$900,000 - $1,799,996	$5208 - $10,417	41 0%	110 1%	184 1%	180 1%	33 0%	14 0%	*562* *1%*
$500,000 +	$1,800,000 +	$10,417 +	2 0%	9 0%	13 0%	16 0%	5 0%	0 0%	*45* *0%*
(Age Range)			25-34	35-44	45-54	55-64	65-74	75+	Total
			17,241	***17,886***	***21,957***	***19,548***	***10,580***	***9,406***	***96,618***

In today's market, mortgage loans are offered at a lower interest rate than the 7% industry standard shown above. The chart below shows the increase in purchasing power based on an interest rate of 4%. It should be noted, the figures shown are based on a 28% debt to income ratio and assume good credit. Actual qualifications will vary depending on credit scores, employment history, debt and other factors.

Housing Affordability
4% and 7% Interest Rate

Annual Income	20% Down 7% Interest	20% Down 4% Interest	Difference
$50,000	$ 180,000	$ 215,000	$ 35,000
$75,000	$ 270,000	$ 325,000	$ 55,000
$100,000	$ 360,000	$ 435,000	$ 75,000

KEY FINDINGS FROM THE THURSTON COUNTY FOCUS AREA STUDY

- Ten separate focus areas were surveyed for this study. The surveyed area for each focus area was a one mile radius. Six of the focus areas are located off the I-5 corridor and four were in outlying towns located up to ½ hour off of I-5.

- What you will find in this section of the report:
  A separate spreadsheet on each focus area
  A spreadsheet including and comparing all Focus Areas

- Each Focus Area data set is presented first by itself with comments followed by a comparison summary showing all ten Focus Areas organized in sequence of likely development.

- We found the data in the Focus Areas much different from the County data. This is due to the limited number of people currently living in the Focus Areas, the age of the housing and the number of rentals in the Focus Area.

- The majority of people who would buy into the higher density corridors do not currently live there as they moved out to the suburbs to buy new housing as there were very few choices if any new housing in the Focus Areas for years.

- We compared each Focus Area using the walk score (a line item on the Focus Area spreadsheet) as well as driving the areas to identify amenities and neighborhood charactics already in place. The more amentites there are the more people will be attraced to live in higher density. The higher the Walk Scores the more desirable and ready for higher density the Focus Area is.

- The order in which the areas should be developed based on supply, demographics and neighborhood characteristics are as follows:
  1. Downtown Olympia and Gateway
  2. Headwaters/Woodland
  3. West Olympia and Tumwater South
  4. Brewery
  5. Yelm
  6. Tenino
  7. Rainier
  8. Bucoda

The following are similarities within the six I-5 corridor Focus Areas and the four Outlying Corridor areas:

The six I-5 Corridor Focus Area Similarities:

- With the exception of Gateway and West Olympia the median age is over 35 years of age.

- The majority of people have lived in their homes over ten years making them the least likely to move at least until they are forced to for health reasons.

- There are very few units in the development process meaning there will be very little new new construction within the next five years.

- A large percentage of the residents are singles.

- A very high percentage of the residents drive alone to work.

- The majority of the existing housing in the I-5 corridor Focus Areas are older (built before 1970) with the exception of Headwaters/Woodland.

- In the six I-5 Focus Areas, housing built between 2000 – 2010 average between 7 and 48 new dwelling per year. Gateway with 480 new housing units and Headwaters/Woodland with 434 new housing units added between 2000 and 2010 have added the most new housing.

- Almost all the I-5 Focus Areas lack; parks, senior centers and community centers. (Keep in mind we are referring to the one mile radius only)

- The 1-5 corridor Focus Areas have the highest incidence of rental housing.

The four Outlying Focus Area Similarities:

- Suprisingly the outlying Focus Areas have the oldest populations with the median age ranging between 38.8 to 40.8 compared to the I-5 Corridor Focus Areas median ages which range between 33.3 to 37.9.

- The fewest married couples within the one mile radius however outside the one mile radius there are many young families who moved to these outlying areas because housing was less expensive.

- Household sizes in the Outlying Focus Areas range from 2.19 to 2.71 compared to the I-5 Focus Areas at 1.76 to 2.23 (with the exception of Gateway at 2.56).

- The highest percentage of people over the age of 15 who never married.

- The outlying Focus Areas have the highest incidence of owner occupied housing and the lowest incidence of rental housing.

- The majority of the housing stock in the outlying Focus Areas are single family homes followed second by mobile homes.

- The outlying Focus Areas all lack enough senior housing to meet the future demand for their older residents, which forces these residents to either stay in their homes or move out of the area away from their friends.

- The majority of people drive alone 20 to 24 minutes to work.

- The outlying Focus Areas have the highest percentage of carpooling compared to the I-5 Focus Areas.

Redevelopment

Details to consider when designing and redeveloping neighborhoods include:

- **Begin with the public spaces** as the framework around which housing, retail and commercial buildings are planned and designed.

- **Build a strong sense of community** for residents and workers by creating social gathering places.

- **Provide a sense of place** and a variety of destinations. This is sometimes referred to as the Power of Ten, or providing ten destination places or interest areas within one community or neighborhood.

- **Offer a wide range of uses and activities** so that they are vibrant and well-used during all seasons, and serve a variety of people of all ages, races and economic levels.

- **Support transit options** and smart growth principles.

A key to the success of a community is creating a neighborhood where residents interact with each other, which in turn creates a sense of community, safety, and pride. One way to measure the success of the community is to ensure all the elements of a healthy community are available in order to meet the social, economic and physical well-being of the people, places, and natural environments. The items below are elements of healthy communities:

- Designed to be walkable, sustainable and human-scaled.
- Promote physical activity within the course of daily living.
- Contain clearly identifiable Focus Areas and edges.
- Planned to be interconnected by convenient, attractive and safe streets, walks and trails.
- Provide accessible, multiple-use public squares, plazas and parks.
- Support diverse housing choices for all ages, incomes and families.
- Offer transportation options that reduce auto use and make transit convenient.
- Provide balanced work, shopping, educational and recreational opportunities.
- Encourage economic, environmental and cultural responsiveness and sustainability.

Strong design, careful planning, open spaces and pedestrian amenities will all be important. It will also be important to have a strong entrance that identifies the community and creates a sense of arrival.

Buildings with shops should front the sidewalks and contain businesses such as cafes, small grocery stores, and dry cleaners that are useful to the residents of the community. Weather-protected benches and bike racks should be located at the bus stops. Another important ingredient for success is the integration of the cultures. When designing community spaces such as parks, use beautiful materials that are either native to the area or are important to the different resident cultures.

With this thought of healthy community and integration in mind, we have evaluated possible amenities and services and have included those that will be most beneficial to the community. Based on our experience of completing market analyses for communities throughout the Puget Sound region, we have listed the services and amenities recommended for the Focus Areas below:

- Upgraded streets and sidewalks.

  The area should feel safe and walkable, with tree-lined sidewalks and roads. Covered bus stops/waiting areas should be incorporated to give the area a secure/safe feeling.

- Walking trails, courtyard areas, pocket parks, benches, green/open spaces.

  To add to the community, these features will provide gathering areas and be visually appealing as well. Seating areas, stand-alone benches and fixed waste paper/recycling cans must also be centrally located. Walkways will give the impression of a visually pleasing walking area. Dog parks are also a new trend that has been shown to give neighborhoods a community-oriented atmosphere.

- Service-oriented retail.

  Retail services that are beneficial to any high density area include, but are not limited to: bicycle shops, newsstand/bookstores, small home furnishing stores, clothing stores, florists, office supply/stationery/shipping and gift stores, full service restaurants, cafés, cleaners, banks, hair salons, spas, and specialty food services.

- Food, restaurants, and grocery options.

  Food, restaurant, and grocery options should be centrally located for convenience and should include: coffee shops, small eating cafes, sub shop/fast food options (not drive-through chains), a grocery store, juice/smoothie bars, full scale restaurants, and bakery/bagel shops.

- Public art, water features, cultural points of interest.

  Integrated into the previously mentioned open/green spaces, public art, water features, and cultural points of interest are necessary to the overall feeling and layout of the neighborhood. Also, interactive public art would give the neighborhood a family-oriented feeling.

BACKGROUND AND SUPPORTING DATA:

Pierce and Thurston County Supply and Demand Data

Focus Area Comparison Spreadsheet

Individual Focus Area Characteristics

ACS Housing and Population Summaries

New Home Trends Development Summaries

Population Lifestyle Segmentation (AKA Tapestry Descriptions)

Pierce and Thurston County Supply and Demand

Pierce and Thurston County Supply and Demand Data

PROJECTED DEMAND	Source	Pierce County	Thurston County	Comments
Estimated Total 2010 Population	9	836,668	253,422	OFM Medium GMA Projection (P) TCRP (T)
Projected Population Growth 2010 - 2020		111,255	56,017	OFM Medium: 2020 Estimate - 947,923 (P) TCRP 309,438 (T)
Projected Population Growth 2021 - 2030		103,030	60,427	OFM Medium: 2030 Estimate - 1,050,953 (P) 369,866 (T)
Projected Population Growth 2031 - 2040		102,095	57,127	Growth Based on Previous 10 Year growth rate of: 1.1% - 1,156,048 (P) 1.5% (T)
TOTAL PROJECTED POPULATION GROWTH 2010 - 2040		**316,380**	**173,571**	
Estimated Total 2010 Housing Units	9	330,539	108,176	US Census/TCRP
Projected Medium housing demand 2010 - 2020	4 & 5	42,956	26,028	Thurston County: TCRP projected houseshold demand using occupied and vacant units
Projected Medium housing demand 2021 - 2030	4 & 5	39,780	28,946	Pierce County HH size determined by ESRI 2010 household size of 2.59
Projected Medium housing demand 2031 - 2040	4 & 5	39,419	25,478	Growth Based on % of previous 10 year growth 1.1% for Pierce County
TOTAL PROJECTED HOUSEHOLD GROWTH 2010 - 2040		**122,154**	**80,452**	
Projected Detached Single Family Demand	4 & 5			Used ESRI 2015 % of rentals versus homeownership
Single family detached 2010 - 2020		26,718	17,074	to calculate future SFD and MF
Single family detached 2021 - 2030		24,743	18,989	
Single family detached 2031 - 2040		24,519	16,714	Owner - 65.6%; Rental - 34.4%; (T) Owner - 62.2%; Rental - 37.8% (P)
TOTAL PROJECTED SINGLE FAMILY DEMAND 2010 - 2040		**75,980**	**52,777**	
Projected housing Multi-Family Demand	4 & 5			Used ESRI 2015 % of rentals versus homeownership
Multi-family (includes apartments, condos, senior housing) 2010 - 2020		16,237	8,954	to calculate future SFD and MF
Multi-family (includes apartments, condos, senior housing) 2021 - 2030		15,037	9,957	
Multi-family (includes apartments, condos, senior housing) 2031 - 2040		14,900	8,764	
TOTAL PROJECTED MULTI--FAMILY DEMAND 2010 - 2040		**46,174**	**27,675**	
Projected job growth 2010 - 2020	4 & 5		31,300	Pierce County 2010 - 2030
Projected job growth 2021 - 2030		98,220	25,600	Workforce Explorer Nonfarm Employment (P)
Projected job growth 2031 - 2040			27,400	TRPC (T)
Median Age 2010	9	35.6	38.5	Pierce is younger, more kids, less affluent
PROJECTED DEMAND	Source	Pierce County		Comments

Pierce and Thurston County Supply and Demand Data

Pierce County Population by Age

	2010	2020			2030			Change 2010 - 2030	
	Population	Population	Difference	% Difference	Population	Difference	% Difference	Difference	% Difference
Under 20	231,084	251,121	20,037	9%	274,048	22,927	8%	42,964	19%
20-24	60,282	59,713	(569)	-1%	64,735	5,022	8%	4,453	7%
25-34	115,711	131,926	16,215	14%	129,499	(2,427)	-2%	13,788	12%
35-44	116,187	124,885	8,698	7%	142,400	17,515	12%	26,213	23%
45-54	127,811	120,677	(7,134)	-6%	129,246	8,569	7%	1,435	1%
55-64	96,246	125,022	28,776	30%	118,426	(6,596)	-6%	22,180	23%
65-74	51,364	85,355	33,991	66%	111,152	25,797	23%	59,788	116%
75-84	26,684	36,105	9,421	35%	61,631	25,526	41%	34,947	131%
over 85	11,319	13,119	1,800	16%	19,816	6,697	34%	8,497	75%
Total	836,688	947,923	111,235	13%	1,050,953	103,030	10%	214,265	26%

Source: OFM

There will be more demand for all age apartments in Pierce than in Thurston but in terms of absolute numbers Pierce will have twice as much demand for all age apts.

Similar % demand for SFD in both Counties but in terms of absolute numbers Pierce will have over twice as much demand for SFD.

Thurston County Population by Age

Age	2010	2020	2020 Difference	2020 % Difference	2030	2030 Difference	2030 % Difference	2040	2040 Difference	2040 % Difference	Difference 2010 - 2040	% Difference 2010-2040
0-14	47,574	57,151	9,577	20%	66,185	9,034	16%	74,927	8,742	13%	27,353	57%
15-24	35,482	39,967	4,485	13%	47,685	7,718	19%	55,200	7,515	16%	19,718	56%
25-34	32,739	40,359	7,621	23%	44,658	4,298	11%	52,593	7,935	18%	19,854	61%
35-44	33,835	40,832	6,996	21%	49,861	9,029	22%	54,762	4,901	10%	20,927	62%
45-54	40,162	40,547	385	1%	48,259	7,712	19%	58,210	9,951	21%	18,047	45%
55-64	32,875	41,334	8,460	26%	42,047	713	2%	49,615	7,568	18%	16,741	51%
65-74	16,818	30,342	13,525	80%	38,850	8,507	28%	39,737	887	2%	22,919	136%
75-84	9,459	13,561	4,102	43%	24,342	10,781	79%	31,773	7,431	31%	22,314	236%
85+	4,478	5,345	867	19%	7,980	2,635	49%	10,177	2,197	28%	5,699	127%
	253,422	309,438	56,017	22%	369,866	60,427	20%	426,993	57,127	15%	173,571	68%

Source: Thurston Regional Planning Council

Senior housing demand starts in 2010 and ends in 2040 in Pierce and Thurston
Independent, assisted and memory care unit demand will be highest between 2020 and 2030

Median household income 2010	9	$57,879	$60,237	Median HH income can afford $200-$230,000 in 2010
Median household income 2020		$77,785	$80,954	Projections based on annual 3% increase
Median household income 2030		$104,535	$108,794	
Median household income 2040		$140,487	$146,211	
Percentage of homeownership	9	57.70%	62.80%	2015 ESRI Market Profile Higher demand for SFD in Thurston
Percentage of rental housing 2010 (apartments and house)	9	33.40%	31.50%	Higher demand for apartments in Pierce

Pierce and Thurston County Supply and Demand Data

PROJECTED SUPPLY	Source	Pierce County	Thurston County	Comments
Recorded remaining finished lots in current selling plats July 1, 2011	6	6,345	3,134	
Total single family detached lots in the pipeline as of July 1, 2011	6	20,428	13,873	
In Final Plat could be recorded within 6 months		1,706	156	
With Preliminary Plat Approval (could be recorded finished lots within 18 months)		15,152	6,331	
In Review Process (could be recorded finished lots by 2014)		3,569	7,386	
Years of pipeline supply July 1, 2010 (pipeline lots - 25% which will never come out)	6	6.4	9.8	Using the 10 year average of building permits
With Final Plat Approval		0.5	1.1	
With Preliminary Plat Approval		4.7	4.5	
In Review Process		1.1	5.2	
Number of new unsold multi family as of July 1, 2011	6	672	222	
Number of multi-family in the pipeline as of July 1, 2011 (apartments, condos, senior)	6	12,560	4,840	
Years of multi-family supply in the pipeline based on building permit data	6	12.2	19.67	Based on 10 year average of Multi-Family building permits
Years of multi-family supply in the pipeline based on projected MF demand 2010-2020	6	7.8	6.1	Based on projected multi-family demand over the next ten years
Average yearly number of SFD permits between 2000 - 2010	1	3,641	1,661	
Average yearly number of multi-family permits between 2000 - 2010	1	1,029	246	
Top Tapestry Segments with % of households				
Up and Coming families	9	9.60%	3.30%	Young affluent suburban families with children (homeowners)
Mainstreet USA	9	8.10%	4.80%	Suburban move up buyers (homeowners)
Inner City Tenants	9	7.50%	1.40%	Inner city apartment dwellers (apartment renters)
Green Acres	9	6.90%	6.40%	Educated, hardworking families on the suburban fringes (homeowners)
Sophisticated Squires	9	6.40%	4.80%	Affluent, well educated, have longer commutes, fewer neighbors (homeowners)
Midland Crowd	9	5.90%	18.70%	Rural families living in single family homes, don't move unless necessary (homeowners)
In Style	9	3.30%	11.50%	Prof. couples with few children favor urban settings (own townhomes, condos & SFD)
Aspiring Young Families	9	5.50%	9.20%	Creates demand for entry level homes and apartments (townhomes, apartments, condos)
Exurbanites	9	6.10%	9.00%	Live in extreme suburban settings (homeowners)
Old and Newcomers	9	4.50%	6.20%	Urban dwellers live in college towns (townhomes, apartments, older single family homes)
Prosperous Empty Nesters	9	3.80%	3.60%	Well educated married couple still working, live in older single family homes (homeowners)
Cozy and Comfortable	9	4.40%	3.60%	Couples w/w out kids live in urban clusters in metro areas short commutes (homeowners)

Pierce and Thurston County Supply and Demand Data

PROJECTED SUPPLY	Source	Pierce County	Thurston County	Comments
Average time from plat application to recording	6	7.9 years	5.8 years	
Average time from start of sales to sell out of attached product	6	2.2 years	3 years	
Average time from start of sales to sell out of a new single family development	6	3.4 years	4.3 years	
Average lot size of closed new homes in subdivisions in 2011	6	5,500	4,900	smaller lots mean less expensive homes
Average lot size of recorded vacant lots in subdivisions 6/2011	6	7,000	7,500	
Average lot size of lots in the pipeline 6/2011	6	6,500	5,750	
Average size of new homes in subdivisions closed in first half of 2011	6	2,126	2,103	
Average price of new closed homes in subdivisions in first half of 2011	6	$234,973	$242,470	Thurston Co is now higher because new housing available is closer to I-5
Average number of new attached sales per year - 10 year average	6	509	80	
Average number of new single family sales per year - 10 year average	6	2,395	1,057	
Median price of new single family homes available mid 2011	6	$243,720	$259,900	
Median value of all housing in the County	6	$262,400	$248,700	
Median price of re-sale single family homes available 6/1/2011	6	$226,950	$254,700	Only $5,000 separate new & resale price
Median price of new for-sale attached multi-family 6/1/11	6	$329,400	$239,950	higher in Pierce because of steel and concrete
Median price of re-sale condominiums available 6/1/2011	6	$180,000	$180,950	
March 2011 Vacancy rate (all units in buildings with 20+ units))	7	5.60%	5.20%	Vacancy rates trending down
Five year vacancy rate average (all units in buildings with 20+ units)	7	5.90%	4.60%	Vacancy rates trending down
Average apartment rents 3/11 for all units in buildings with 20+ units	7	$820	$834	Rents trending up as vacancies come down
Average apartment rents 3/11 for all units built after 2010 in building with 20+ units	7	$1,043	$1,142	Rents trending up as vacancies come down
Average price of SFD land with review status (no preliminary plat approval) mid 2011	6	$145,015	NA	No sales in Thurston

Pierce and Thurston County Supply and Demand Data

PROJECTED SUPPLY	Source	Pierce County	Thurston County	Comments
Average price per SFD lots with preliminary plat approval mid 2011	6	$89,866	$64,377	
Average price per SFD lot at final plat approval (85 - 95% plat completion) mid 2011	6	N/A	N/A	
Average price for a recorded SFD finished lot 1/1/11 - 6/1/11	6	$42,743	$46,118	
Average price of multi-family land in mid 2011	6	N/A	N/A	
Average price of multifamily land that is pad ready (streets, sewer, water) mid 2011	6	N/A	$18,000	

Pierce and Thurston County Supply and Demand Data

PROJECTED HOUSING DEMAND BY DENSITY/PRODUCT TYPE	Source	Pierce County	Thurston County	Comments
Identify the projected housing demand by type between 2010-2020	6			
Single Family Detached (6 Units per acre) Includes carriage units, adult family homes		27,000	16,900	For families and seniors with boomerang kids, elderly parents or extended families
Townhomes 10 to 15 Units Per Acre (25% of MF demand) includes live work townhomes		4,000	2,340	Singles & couples w/o full time children (can be row house, duplex to four plex)
Low Rise Buildings 18 Units per acre (50% of MF demand)		8,000	4,420	Singles (apartments & condos), families (apartments), seniors (senior housing & condos)
Mid Rise Buildings (24 to 36 units per acre wood frame) (20% of MF demand)		2,400	1,600	For professional singles, couples with no children and seniors
High Rise Buildings (9 + floors steel and concrete building) (5% of MF demand)		1,600	520	For professional singles, couples with no children and seniors
TOTAL PROJECTED HOUSING DEMAND BETWEEN 2010-2020 (ROUNDED)		**43,000**	**26,000**	
Identify the projected housing demand by type between 2021-2030	6			
Single Family Detached (6 Units per acre) Includes carriage units, adult family homes		25,000	16,500	For families and seniors with boomerang kids, elderly parents or extended families
Townhomes 10 to 15 Units Per Acre (25% of MF demand) includes live work townhomes		3,750	2,250	Singles & couples w/o full time children (can be row house, duplex to four plex)
Low Rise Buildings 18 Units per acre (50% of MF demand)		7,500	4,000	Singles (apartments & condos), families (apartments), seniors (senior housing & condos)
Mid Rise Buildings (24 to 36 units per acre wood frame) (20% of MF demand)		2,250	1,750	For professional singles, couples with no children and seniors
High Rise Buildings (9 + floors steel and concrete building) (5% of MF demand)		1,500	500	For professional singles, couples with no children and seniors
TOTAL PROJECTED HOUSING DEMAND BETWEEN 2021-2030 (ROUNDED)		**40,000**	**25,000**	
Identify the projected housing demand by type between 2031-2040	6			
Single Family Detached (6 Units per acre) Includes carriage units, adult family homes		25,000	16,575	For families and seniors with boomerang kids, elderly parents or extended families
Townhomes 10 to 15 Units Per Acre (25% of MF demand) includes live work townhomes		3,750	2,295	Singles & couples w/o full time children (can be row house, duplex to four plex)
Low Rise Buildings 18 Units per acre (50% of MF demand)		7,500	4,335	Singles (apartments & condos), families (apartments), seniors (senior housing & condos)
Mid Rise Buildings (24 to 36 units per acre wood frame) (15% of MF demand)		2,250	1,275	For professional singles, couples with no children and seniors
High Rise Buildings (9 + floors steel and concrete building) (10% of MF demand)		1,500	765	For professional singles, couples with no children and seniors
TOTAL PROJECTED HOUSING DEMAND BETWEEN 2031-2040 (ROUNDED)		**40,000**	**25,500**	
SOURCE KEY				
1. US Census				
2. ACS Housing Summary				
3. ACS Population Summary				
4. OFM				
5. Thurston Regional Planning				
6. New Home Trends, Inc.				
7. Dupre and Scott				
8. North West Multiple Listing Service				
9. ESRI forecasts for 2010 & 2015 based on 2000 US Census				

Focus Area Comparison Spreadsheet

Corridor Population and Attributes	Source	Downtown Olympia	Gateway	Headwaters/ Woodland	W. Olympia	Tumwater	Brewery	Downtown Yelm	Tenino	Rainier	Bucoda	Comments
Population - 2005-2009 Averaged	2	7,600	6,595	8,193	10,671	4,869	6,526	4,629	1,545	1,576	727	
Projected Population Growth 2010 - 2020		1,672	1,451	1,802	2,348	1,071	1,436	1,018	340	347	160	
Projected Population Growth 2021 - 2030		1,852	1,852	1,852	1,852	1,852	1,852	1,129	377	385	177	
TOTAL PROJECTED POPULATION GROWTH 2010 - 2030		**3,524**	**3,303**	**3,654**	**4,199**	**2,923**	**3,287**	**2,148**	**717**	**731**	**337**	
Housing Units - 2005-2009 Averaged	2	4,307	2,572	4,008	4,827	2,237	2,918	1,708	704	648	293	
Projected Average housing demand 2010 - 2020		1,034	617	962	1,158	537	700	410	169	156	70	
Projected Average housing demand 2021 - 2030		1,175	702	1,093	1,317	610	796	466	192	177	80	
TOTAL PROJECTED HOUSEHOLD GROWTH 2010 - 2030		**2,209**	**1,319**	**2,055**	**2,475**	**1,147**	**1,496**	**876**	**361**	**332**	**150**	
Projected Detached Single Family Demand 2010 - 2030	4 & 5	-	330	**206**	371	172	374	657	271	249	113	
Single family detached 2010 - 2020		-	148	92	167	77	168	296	122	112	51	
Single family detached 2021 - 2030		-	181	113	204	95	206	361	149	137	62	
Projected housing Multi-Family Demand 2010 - 2030	4 & 5	2,209	989	**1,850**	2,104	975	1,122	219	90	83	38	
Multi-family (includes apartments, condos, senior housing) 2010 - 2020		994	445	832	947	439	505	99	41	37	17	
Multi-family (includes apartments, condos, senior housing) 2021 - 2030		1,215	544	1,017	1,157	536	617	120	50	46	21	
Projected Housing Demand by Density/Product Type		Downtown Olympia	Gateway	Headwaters/ Woodland	W. Olympia	Tumwater	Brewery	Downtown Yelm	Tenino	Rainier	Bucoda	Comments
Identify the projected housing demand by type between 2010-2020												
ingle Family Detached (6 Units per acre) Includes carriage units, adult family homes		0	148	92	167	77	168	296	122	112	51	
Townhomes 10 to 15 Units Per Acre includes live work townhomes		99	111	208	426	110	126	39	10			
Low Rise Buildings 18 Units per acre		497	223	416	473	219	253	49	30	37	17	
Mid Rise Buildings (24 to 36 units per acre wood frame)		248	111	208	47	110	126	10	0			
High Rise Buildings (9 + floors steel and concrete building)		149	0	0	0	0	0	0	0			
TOTAL PROJECTED HOUSING DEMAND BETWEEN 2010-2020 (ROUNDED)		**994**	**594**	**925**	**1114**	**516**	**673**	**394**	**162**	**150**	**68**	
Identify the projected housing demand by type between 2021-2030												
Single Family Detached (6 Units per acre) Includes carriage units, adult family homes		0	181	113	204	95	206	**361**	149	137	62	
Townhomes 10 to 15 Units Per Acre includes live work townhomes		121	136	254	405	134	154	**42**	12	0	0	
Low Rise Buildings 18 Units per acre		607	218	509	579	322	309	**60**	37	46	21	
Mid Rise Buildings (24 to 36 units per acre wood frame)		304	190	254	174	80	154	**18**	0	0	0	
High Rise Buildings (9 + floors steel and concrete building)		182	0	0	0	0	0	**0**	0	0	0	
TOTAL PROJECTED HOUSING DEMAND BETWEEN 2021-2030 (ROUNDED)		**1,215**	**725**	**1,130**	**1,361**	**631**	**823**	**482**	**199**	**183**	**83**	
TOTAL PROJECTED HOUSING DEMAND BETWEEN 2010-2030 (ROUNDED)		**2,209**	**1,319**	**2,055**	**2,475**	**1,147**	**1,496**	**876**	**361**	**332**	**150**	

Population	Source	Downtown Olympia	Gateway	Headwaters/ Woodland	W. Olympia	Tumwater	Brewery	Downtown Yelm	Tenino	Rainier	Bucoda	Comments
Estimated Median Age 2010	9	37.3	33.7	37.1	33.3	35.1	37.9	40.4	40.4	40.8	38.8	Outlying areas are older than expected
Population Age 15+ Years by Marital Status 2005-2009 averaged	2											
Total		6,683	5,190	6,642	8,688	4,747	5,397	3,491	1,282	1,350	575	
Married		47%	28%	36%	39%	37%	29%	21%	25%	24%	21%	Few married people in outlying areas
Never Married		33%	54%	39%	43%	41%	52%	62%	55%	58%	58%	
Widowed		5%	3%	12%	5%	6%	5%	5%	5%	4%	4%	
Divorced		16%	15%	14%	13%	15%	14%	12%	15%	13%	17%	
Workers Age 16+ by Place of Work 2005-2009 averaged	2	4,363	2,990	3,642	5,162	2,752	3,712	1,917	807	756	293	
Worked in State and County of Residence		82%	66%	75%	86%	85%	81%	51%	83%	73%	59%	
Worked in State and outside County of Residence		16%	34%	24%	14%	15%	18%	48%	15%	26%	41%	
Worked outside state of residence		2%	0%	9%	0%	0%	1%	8%	2%	1%	0%	
Workers Age 16+ years by Means of Transportation to Work 2005-2009 averaged	2											
Total		4,363	2,990	3,642	5,162	2,752	3,712	1,917	807	756	293	
Drove Alone		60%	73%	76%	61%	75%	68%	76%	71%	80%	67%	
Carpooled		9%	18%	9%	14%	14%	17%	13%	18%	17%	26%	
Public Transportation		9%	4%	2%	12%	7%	6%	1%	0%	0%	0%	
Taxicab		0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	
Motorcycle		0%	1%	0%	1%	0%	1%	0%	0%	0%	0%	
Bicycle		6%	1%	2%	5%	0%	2%	1%	1%	0%	0%	
Walked		12%	2%	4%	4%	1%	4%	6%	3%	1%	1%	
Other Means		0%	0%	2%	1%	0%	0%	2%	1%	0%	0%	
Worked at Home		4%	2%	5%	4%	3%	3%	2%	5%	1%	7%	Number of people working from home c
Workers Age 16+ by travel time to work (not working at home) 2005-2009 averag	2											
Total		4,211	2,927	3,448	4,937	2,752	3,614	1,888	807	750	273	
Less than 5 minutes		7%	3%	4%	6%	2%	3%	8%	3%	1%	8%	
5 to 9 minutes		18%	13%	16%	17%	19%	19%	9%	8%	6%	2%	
10 to 14 minutes		27%	12%	18%	21%	33%	34%	9%	6%	5%	6%	
15 to 19 minutes		18%	21%	24%	18%	16%	16%	2%	9%	10%	7%	
20 to 24 minutes		9%	18%	10%	11%	14%	11%	6%	18%	21%	21%	
25 to 29 minutes		2%	5%	5%	4%	2%	4%	5%	11%	10%	17%	
30 to 34 minutes		8%	7%	6%	4%	3%	4%	15%	23%	13%	15%	Further out you live, longer commute t
35 to 39 minutes		2%	3%	2%	10%	2%	1%	9%	4%	7%	8%	
40 to 44 minutes		3%	4%	4%	2%	3%	2%	12%	2%	4%	0%	
45 to 59 minutes		4%	7%	6%	6%	2%	2%	14%	9%	12%	7%	
60 to 89 minutes		3%	6%	3%	3%	3%	3%	9%	4%	7%	5%	
90 or more minutes		1%	1%	3%	2%	2%	2%	4%	5%	5%	6%	

2010 Population Lifestyle Segmentation	Source	Downtown Olympia	Gateway	Headwaters/ Woodland	W. Olympia	Tumwater	Brewery	Downtown Yelm	Tenino	Rainier	Bucoda	Comments
Top Five Tapestry Segments with % of households	9											
Aspiring Young Families			29%			44%	12%					Creates demand for entry level homes & apts
College Towns		22%										Young singles - rentes low rent apartments
Cozy and Comfortable			35%									Couples w/w out kids live in urban clusters owners SFD
Enterprising Professionals					35%		26%					Singles - Owners/renters of TH & apartments
Green Acres										37%		Owners SFD outside Metro areas
In Style				1%		5%						Prof couples with few children favor urban settings (owners of townhomes, condos, SFD)
Inner City Tenants						25%	14%					Singles & single parents - renters of apartments
Mainstreet USA			19%	17%		16%	13%	54%				Suburban move up buyers (homeowners)
Metro Renters		14%										Young singles rentes of older apartments
Metropolitans		36%			29%							Singles & childless couples
Midland Crowd			4%					46%	100%	47%	16%	Rural families in SFD don't move unless necessary
Milk and Cookies			12%		12%							Married couples with children owners SFD
Old and Newcomers		9%		82%	19%							Urban dwellers living in college towns - TH, apts, older SF homes
Prosperous Empty Nesters							16%					Well educated married couples still working
Rooted Rural										16%	84%	Married couples w & wo kids, few relocate
Senior Sun Seekers					4%	8%						Older couples & singles - owners of SFD & mobiles
Social Security Set		13%										Elderly singles& couples - low-rent & high rise
TOTALS		**94%**	**99%**	**100%**	**99%**	**98%**	**81%**	**100%**	**100%**	**100%**	**100%**	

Housing Characteristics	Source	Downtown Olympia	Gateway	Headwaters/ Woodland	W. Olympia	Tumwater	Brewery	Downtown Yelm	Tenino	Rainier	Bucoda	Comments
Total Population (2005-2009 Averaged)	2	7,600	6,595	8,193	10,671	4,869	6,526	4,629	1,545	1,576	727	
Population 50 + (2010 Estimated)	7	2,605	2,095	2,846	3,367	1,812	2,363	1,215	605	677	257	
Total Housing Units (2005-2009 Averaged)	2	4,307	2,572	4,008	4,827	2,918	2,918	1,708	704	648	293	
Owner Occupied Housing (2005-2009 Averaged)	2	37%	57%	34%	42%	37%	58%	67%	67%	80%	80%	
Renter Occupied Housing (2005-2009 Averaged)	2	55%	40%	62%	52%	56%	37%	21%	26%	14%	18%	Older, established areas, more renters
Vacant Housing		8%	3%	4%	6%	7%	5%	12%	7%	6%	2%	
55+ Household (2010 Estimated)	7	34%	36%	39%	31%	35%	35%	35%	41%	39%	40%	Large % of 55+ in outlying areas
Median Home Value (2005-2009 Averaged)	2	$ 243,893	$ 211,585	$ 227,261	$ 234,991	$ 177,459	$ 289,560	$ 215,852	$ 193,269	$ 221,875	$ 175,000	
Household Size		1.76	2.56	2.04	2.2	2.14	2.23	2.71	2.19	2.43	2.48	
Housing Units by Units in Structure (2005-2009 Estimated)												
Total	2	4,307	2,572	4,008	4,827	2,237	2,918	1,708	704	648	293	
1, Detached		48%	59%	37%	49%	40%	64%	72%	69%	75%	79%	Yelm in an anomaly
1, Attached		4%	7%	2%	4%	5%	7%	3%	1%	1%	3%	
2		9%	4%	5%	4%	4%	6%	2%	2%	2%	0%	
3 or 4		6%	7%	7%	8%	7%	3%	1%	1%	0%	0%	
5 to 9		3%	2%	10%	10%	12%	6%	28%	3%	2%	0%	
10 to 19		8%	5%	10%	11%	7%	10%	2%	4%	0%	0%	
20 to 49		8%	3%	3%	1%	1%	1%	0%	0%	0%	0%	
50 or more		12%	0%	17%	9%	12%	4%	2%	0%	0%	3%	
Mobile Home		0%	11%	9%	5%	11%	0%	17%	20%	20%	14%	
Boat, RV, Van, etc.		1%	1%	1%	0%	1%	0%	0%	0%	0%	0%	
Housing Units by Year Structure Built	2											
Total		4,307	2,572	4,008	4,827	2,237	2,918	1,708	704	648	293	
Built in 2005 or later		1%	1%	4%	2%	1%	3%	10%	4%	4%	2%	
Built 2000 to 2004		4%	7%	8%	7%	2%	6%	20%	12%	12%	9%	
Built 1990 to 1999		8%	10%	28%	17%	9%	19%	24%	34%	34%	7%	
Built 1980 to 1989		9%	14%	18%	21%	22%	11%	15%	11%	11%	9%	
Built 1970 to 1979		10%	44%	23%	17%	36%	11%	15%	23%	23%	23%	
Built 1960 to 1969		7%	15%	8%	5%	15%	10%	4%	3%	3%	8%	
Built 1950 to 1959		12%	6%	5%	9%	8%	11%	3%	1%	1%	14%	
Built 1940 to 1949		9%	1%	5%	9%	4%	10%	3%	1%	1%	4%	
Built 1939 or earlier		42%	2%	2%	13%	3%	19%	6%	13%	13%	25%	
Median year structure built		1949	1976	1984	1978	1975	1970	1992	1978	1990	1969	

Housing Characteristics	Source	Downtown Olympia	Gateway	Headwaters/ Woodland	W. Olympia	Tumwater	Brewery	Downtown Yelm	Tenino	Rainier	Bucoda	Comments
Occupied Housing Units by Year Householder Moved into Unit	2											
Total		1,600	1,471	3,846	2,025	833	1,678	1,160	650	516	238	
2005 or later		7%	7%	7%	6%	8%	9%	21%	13%	14%	8%	
2000 to 2004		13%	15%	9%	14%	9%	20%	23%	14%	31%	29%	
1990 to 1999		10%	19%	12%	12%	8%	16%	23%	18%	23%	13%	
1980 to 1989		6%	10%	6%	6%	7%	9%	4%	18%	7%	25%	
1970 to 1979		3%	5%	2%	4%	5%	4%	5%	6%	7%	7%	
1969 or earlier		3%	3%	7%	4%	4%	3%	1%	3%	4%	1%	
Occupied Housing Units by Vehicles Available	2											
Total		3,979	2,507	3,846	4,558	2,076	2,754	1,519	650	608	290	
Owner Occupied		1,600	1,471	1362	2,025	833	1,678	1,160	470	516	238	
No Vehicle Available		0%	3%	1%	2%	1%	0%	2%	2%	1%	2%	
1 Vehicle Available		14%	11%	13%	13%	15%	17%	11%	15%	22%	25%	
2 Vehicles Available		20%	19%	15%	3%	12%	26%	34%	24%	27%	17%	
3 Vehicles Available		4%	19%	6%	5%	11%	14%	14%	16%	25%	26%	
4 Vehicles Available		1%	5%	1%	3%	2%	4%	9%	9%	8%	5%	
5 or More Vehicles Available		0%	2%	0%	0%	1%	1%	6%	5%	2%	7%	
Renter Occupied		2,378	1,036	2,484	2,553	1,243	1,076	359	180	91	52	
No Vehicle Available		18%	5%	14%	8%	9%	5%	3%	1%	0%	0%	
1 Vehicle Available		30%	18%	28%	36%	34%	22%	8%	17%	6%	8%	
2 Vehicles Available		9%	17%	20%	9%	12%	10%	9%	8%	6%	8%	
3 Vehicles Available		2%	2%	3%	2%	4%	3%	3%	1%	1%	1%	
4 Vehicles Available		0%	0%	0%	0%	1%	0%	0%	1%	1%	0%	
5 or More Vehicles Available		0%	0%	0%	0%	0%	0%	0%	0%	1%	0%	

Current and Future Housing Supply	Source	Downtown Olympia	Gateway	Headwaters/ Woodland	W. Olympia	Tumwater	Brewery	Downtown Yelm	Tenino	Rainier	Bucoda	Comments
Recorded remaining finished lots in current selling plats October 1, 2011	6	0	0	0	141	7	239	310	0	60	0	
Total single family detached lots in the pipeline as of October 1, 2011	6	0	0	34	33	121	18	5248	18	27	0	
In Final Plat could be recorded within 6 months	6	0	0	0	0	0	0	0	0	0	0	
With Preliminary Plat Approval (could be recorded finished lots within 18 m	6	0	0	34	24	121	18	193	18	27	0	
In Review Process (could be recorded finished lots by 2014)	6	0	0	0	9	0	0	5031	0	0	0	
Number of new unsold multi family as of October 1, 2011	6	6	0	0	0	0	0	0	0	0	0	
Number of multi-family in the pipeline as of October 1, 2011 (apartments, condo	6	149	500	51	279	40	51	40	0	0	0	
Median value of all housing in the County	6	$ 248,700	$ 248,700	$ 248,700	$ 248,700	$ 248,700	$ 248,700	$ 248,700	$ 248,700	$ 248,700	$ 248,700	
Median price of new for-sale single family home available 10/1/11	8	N/A	N/A	N/A	$ 224,950	$ 349,950	$ 250,132	$ 209,263	n/a	$ 219,608	N/A	
Median price of re-sale single family homes available 10/1/2011	8	$ 269,000	$ 139,000	$ 326,000	$ 236,975	$ 164,900	$ 199,500	$ 179,900	$ 183,750	$ 179,999	$ 239,000	
Median price of new for-sale attached multi-family 10/1/11	6	$ 371,400	N/A	$ 371,400	n/a	N/A	N/A	N/A	n/a	N/A	N/A	
Median price of re-sale condominiums available 10/1/2011	8	$ 210,000	$ 105,000	$ 210,000	$ 214,975	N/A	$ 69,900	N/A	n/a	N/A	$ 214,975	

Community Characteristics	Source	Downtown Olympia	Gateway	Headwaters/ Woodland	W. Olympia	Tumwater	Brewery	Downtown Yelm	Tenino	Rainier	Bucoda	Comments
Public Transportation within 1 mile		Yes	Yes	Yes	Yes	Some	Yes	Yes	Yes	Yes	Yes	
Proximity to jobs		Government Retail	Government Retail	Government Retail Hospital	Government Retail Hospital	Government Retail	Government	Retail JBLM	JBLM	JBLM	JBLM	
Walk Score (1-mile radius)		91	65	55	74	69	52	80	62	40	23	
Local Amenities focus areas have:	6											
Parks		Multiple	No	No	Multiple	No	No	No	Yes	Yes	Yes	
Schools		Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	No	4 miles	
Neighborhood shopping within walking distance		Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	
Medical facilities		No	Providence	Providence	Providence	No	5-miles	No	No	No	No	
Lake or bay access		Yes	No	No	No	No	No	No	No	No	No	
Proximity to the JBLM for people to live		16 Miles	9 Miles	12 Miles	19 Miles	20 Miles	17 Miles	5 Miles	18 Miles	10 Miles	23 Miles	
Community Center		YMCA	YMCA & CC	Lacey CC	No	No	No	No	No	No	No	
Senior Center		No	No	No	Yes	No	No	Yes	No	No	No	

Individual Focus Area Characteristics

Downtown District

Corridor Population and Attributes	Source	Downtown	Comments
Population - 2005-2009 Averaged	2	7,600	
Projected Population Growth 2010 - 2020		1,672	Based on County growth of 22% between 2011 and 2020
Projected Population Growth 2021 - 2030		1,852	Based on County growth of 20% between 2021 and 2030
TOTAL PROJECTED POPULATION GROWTH 2010 - 2030		**3,524**	
Housing Units - 2005-2009 Averaged	2	4,307	
Projected Average housing demand 2010 - 2020		1,034	Based on County growth of 24% between 2011 and 2020
Projected Average housing demand 2021 - 2030		1,175	Based on County growth of 22% between 2021 and 2030
TOTAL PROJECTED HOUSEHOLD GROWTH 2010 - 2030		**2,209**	
Projected Detached Single Family Demand between 2010 - 2030	4 & 5	**-**	0% of household growth
Single family detached 2010 - 2020		-	45% of growth 2011 and 2030 based on County growth trends
Single family detached 2021 - 2030		-	55% of growth 2011 and 2030 based on County growth trends
Projected housing Multi-Family Demand between 2010 - 2030	4 & 5	**2,209**	75% of household growth
Multi-family (includes apartments, condos, senior housing) 2010 - 2020		994	45% of growth 2011 and 2030 based on County growth trends
Multi-family (includes apartments, condos, senior housing) 2021 - 2030		1,215	55% of growth 2011 and 2030 based on County growth trends
PROJECTED HOUSING DEMAND BY DENSITY/PRODUCT TYPE			
Identify the projected housing demand by type between 2010-2020			
Single Family Detached (6 Units per acre) Includes carriage units, adult family homes		0	
Townhomes 10 to 15 Units Per Acre (10% of MF demand) includes live work townhomes		99	
Low Rise Buildings 18 Units per acre (50% of MF demand)		497	
Mid Rise Buildings (24 to 36 units per acre wood frame) (25% of MF demand)		248	
High Rise Buildings (9 + floors steel and concrete building) (15% of MF demand)		149	
TOTAL PROJECTED HOUSING DEMAND BETWEEN 2010-2020 (ROUNDED)		**994**	
Identify the projected housing demand by type between 2021-2030			
Single Family Detached (6 Units per acre) Includes carriage units, adult family homes		0	
Townhomes 10 to 15 Units Per Acre (10% of MF demand) includes live work townhomes		121	
Low Rise Buildings 18 Units per acre (50% of MF demand)		607	
Mid Rise Buildings (24 to 36 units per acre wood frame) (25% of MF demand)		304	
High Rise Buildings (9 + floors steel and concrete building) (15% of MF demand)		182	
TOTAL PROJECTED HOUSING DEMAND BETWEEN 2021-2030 (ROUNDED)		**1,215**	
TOTAL PROJECTED HOUSING DEMAND BETWEEN 2031-2040 (ROUNDED)		**2,209**	

Downtown District

Population	Source	Downtown	Comments
Estimated Median Age 2010	9	37.3	
Population Age 15+ Years by Marital Status 2005-2009 averaged	2		
Total		6,683	
Married		47%	
Never Married		33%	
Widowed		5%	
Divorced		16%	
Workers Age 16+ by Place of Work 2005-2009 averaged	2	4,363	
Worked in State and County of Residence		82%	
Worked in State and outside County of Residence		16%	
Worked outside state of residence		2%	
Workers Age 16+ years by Means of Transportation to Work 2005-2009 averaged	2		
Total		4,363	
Drove Alone		60%	
Carpooled		9%	
Public Transportation		9%	
Taxicab		0%	
Motorcycle		0%	
Bicycle		6%	
Walked		12%	
Other Means		0%	
Worked at Home		4%	
Workers Age 16+ by travel time to work (not working at home) 2005-2009 averaged	2		
Total		4,211	
Less than 5 minutes		7%	
5 to 9 minutes		18%	
10 to 14 minutes		27%	
15 to 19 minutes		18%	
20 to 24 minutes		9%	
25 to 29 minutes		2%	
30 to 34 minutes		8%	
35 to 39 minutes		2%	
40 to 44 minutes		3%	
45 to 59 minutes		4%	
60 to 89 minutes		3%	
90 or more minutes		1%	

Downtown District

Population	Source	Gateway	Comments
Top Five Tapestry Segments with % of households	9		
Metropolitans		36%	Singles or childless couples - owners of single and multi-family homes
College Towns		22%	Young singles - renters low rent apartments
Metro Renters		14%	Young singles - renters of older high rise apartments
Social Security Set		13%	Elderly singles and couples - renters of low-rent, high rise apartments
Old and Newcomers		9%	Couples w/out kids live in urban clusters in metro areas w/short commute times (homeowners)
Housing Characteristics	**Source**	**Downtown**	**Comments**
Total Population (2005-2009 Averaged)	2	7,600	
Population 50 + (2010 Estimated)	7	2,605	34 percent of population over 50
Total Housing Units (2005-2009 Averaged)	2	4,307	
Owner Occupied Housing (2005-2009 Averaged)	2	37%	
Renter Occupied Housing (2005-2009 Averaged)	2	55%	High rental area
Vacant Housing		8%	
55+ Household (2010 Estimated)	7	34%	
Median Home Value (2005-2009 Averaged)	2	$ 243,893	
Household Size		1.76	divided housing units by population: 1.91 if only using households
Housing Units by Units in Structure (2005-2009 Estimated)			
Total	2	4,307	
1, Detached		48%	
1, Attached		4%	
2		9%	
3 or 4		6%	
5 to 9		3%	
10 to 19		8%	
20 to 49		8%	
50 or more		12%	
Mobile Home		0%	
Boat, RV, Van, etc.		1%	
Housing Units by Year Structure Built	2		
Total		4,307	
Built in 2005 or later		1%	Very few new housing
Built 2000 to 2004		4%	
Built 1990 to 1999		8%	
Built 1980 to 1989		9%	
Built 1970 to 1979		10%	
Built 1960 to 1969		7%	
Built 1950 to 1959		12%	
Built 1940 to 1949		9%	
Built 1939 or earlier		42%	
Median year structure built		1949	Housing is on average very old

Downtown District

Housing Characteristics	Source	Downtown	Comments
Owner Occupied Housing Units by Year Householder Moved into Unit	2		
Total		1,600	
2005 or later		7%	
2000 to 2004		13%	Most homeowners have lived in area over 10 years
1990 to 1999		10%	
1980 to 1989		6%	
1970 to 1979		3%	
1969 or earlier		3%	
Occupied Housing Units by Vehicles Available	2		
Total		3,979	
Owner Occupied		1,600	
No Vehicle Available		0%	
1 Vehicle Available		14%	
2 Vehicles Available		20%	
3 Vehicles Available		4%	
4 Vehicles Available		1%	
5 or More Vehicles Available		0%	
Renter Occupied		2,378	
No Vehicle Available		18%	Large portion of renters do not have vehicle
1 Vehicle Available		30%	
2 Vehicles Available		9%	
3 Vehicles Available		2%	
4 Vehicles Available		0%	
5 or More Vehicles Available		0%	
Current and Future Housing Supply	Source	Downtown	Comments
Recorded remaining finished lots in current selling plats October 1, 2011	6	0	
Total single family detached lots in the pipeline as of October 1, 2011	6	0	
In Final Plat could be recorded within 6 months	6	0	
With Preliminary Plat Approval (could be recorded finished lots within 18 months)	6	0	
In Review Process (could be recorded finished lots by 2014)	6	0	
Number of new unsold multi family as of October 1, 2011	6	6	
Number of multi-family in the pipeline as of October 1, 2011 (apartments, condos, senior)	6	149	
Median value of all housing in the County	8	$ 248,700	
Median price of new for sale single family homes available 10/1/2011	8	n/a	
Median price of re-sale single family homes available 10/1/2011	8	$ 269,000	
Median price of new for-sale attached multi-family 10/1/11	6	$ 371,400	Differentiation in pricing reflective of no new housing in area
Median price of re-sale condominiums available 10/1/2011	8	$ 210,000	

Downtown District

Community Characteristics	Source	Downtown	Comments
Close to regional transportation		Yes	Olympia Transit Center, Bus Stops
Proximity to jobs		t Retail	State Capitol
Walk Score		91	
Local Amenities does the corridor have:	6		
Parks		Multiple	Bigelow Park, Capitol Lake Park, Lions Park
Schools		Yes	Avanti High School, Madison Elementary School, St. Michael School, Roosevelt
Neighborhood shopping within walking distance		Yes	Restaurants, Retail
Medical facilities		No	
Lake or bay access		Yes	
Proximity to the JLMB for people to live		16 Miles	14 miles
Community Center		YMCA	YMCA, Community Youth Services
Senior Center		No	
SOURCE KEY			
1. US Census			
2. ACS Housing Summary			
3. ACS Population Summary			
4. OFM			
5. Thurston Regional Planning			
6. New Home Trends, Inc.			
7. ESRI 50+ Profile			
8. North West Multiple Listing Service			
9. ESRI forecasts for 2010 & 2015 based on 2000 US Census			

Gateway District

Corridor Population and Attributes	Source	Gateway	Comments
Population - 2005-2009 Averaged	2	6,595	
Projected Population Growth 2010 - 2020		1,451	Based on County growth of 22% between 2011 and 2020
Projected Population Growth 2021 - 2030		1,852	Based on County growth of 20% between 2021 and 2030
TOTAL PROJECTED POPULATION GROWTH 2010 - 2030		**3,303**	
Housing Units - 2005-2009 Averaged	2	2,572	
Projected average housing demand 2010 - 2020		617	Based on County growth of 24% between 2011 and 2020
Projected average housing demand 2021 - 2030		702	Based on County growth of 22% between 2021 and 2030
TOTAL PROJECTED HOUSEHOLD GROWTH 2010 - 2030		**1,319**	
Projected Detached Single Family Demand 2010 - 2030	4 & 5	**330**	25% of household growth
Single family detached 2010 - 2020		148	45% of growth 2011 and 2030 based on County growth totals
Single family detached 2021 - 2030		181	55% of growth 2011 and 2030 based on County growth totals
Projected housing Multi-Family Demand 2010 - 2030	4 & 5	**989**	75% of household growth
Multi-family (includes apartments, condos, senior housing) 2010 - 2020		445	45% of growth 2011 and 2030 based on County growth totals
Multi-family (includes apartments, condos, senior housing) 2021 - 2030		544	55% of growth 2011 and 2030 based on County growth totals
PROJECTED HOUSING DEMAND BY DENSITY/PRODUCT TYPE			
Identify the projected housing demand by type between 2010-2020			
Single Family Detached (6 Units per acre) Includes carriage units, adult family homes		148	
Townhomes 10 to 15 Units Per Acre (25% of MF demand) includes live work townhomes		111	
Low Rise Buildings 18 Units per acre (50% of MF demand)		223	
Mid Rise Buildings (24 to 36 units per acre wood frame) (25% of MF demand)		111	
High Rise Buildings (9 + floors steel and concrete building) (0% of MF demand)		0	
TOTAL PROJECTED HOUSING DEMAND BETWEEN 2010-2020 (ROUNDED)		**594**	
Identify the projected housing demand by type between 2021-2030			
Single Family Detached (6 Units per acre) Includes carriage units, adult family homes		181	
Townhomes 10 to 15 Units Per Acre (25% of MF demand) includes live work townhomes		136	
Low Rise Buildings 18 Units per acre (40% of MF demand)		218	
Mid Rise Buildings (24 to 36 units per acre wood frame) (35% of MF demand)		190	
High Rise Buildings (9 + floors steel and concrete building) (0% of MF demand)		0	
TOTAL PROJECTED HOUSING DEMAND BETWEEN 2021-2030 (ROUNDED)		**725**	
TOTAL PROJECTED HOUSING DEMAND BETWEEN 2031-2040 (ROUNDED)		**1,319**	

To optimize demand and increase liklihood of high density the following community features are needed:
- *Parks*
- *Senior Center*

Gateway District

Population	Source	Gateway	Comments
Estimated Median Age 2010	9	33.7	
Population Age 15+ Years by Marital Status 2005-2009 averaged	2		
Total		5,190	
Married		28%	
Never Married		54%	Large Single Population
Widowed		3%	
Divorced		15%	
Workers Age 16+ by Place of Work 2005-2009 averaged	2	2,990	
Worked in State and County of Residence		66%	
Worked in State and outside County of Residence		34%	Many commute out of County
Worked outside state of residence		0%	
Workers Age 16+ years by Means of Transportation to Work 2005-2009 averaged	2		
Total		2,990	
Drove Alone		73%	
Carpooled		18%	
Public Transportation		4%	
Taxicab		0%	
Motorcycle		1%	
Bicycle		1%	
Walked		2%	
Other Means		0%	
Worked at Home		2%	
Workers Age 16+ by travel time to work (not working at home) 2005-2009 averaged	2		
Total		2,927	
Less than 5 minutes		3%	
5 to 9 minutes		13%	
10 to 14 minutes		12%	
15 to 19 minutes		21%	
20 to 24 minutes		18%	
25 to 29 minutes		5%	
30 to 34 minutes		7%	
35 to 39 minutes		3%	
40 to 44 minutes		4%	
45 to 59 minutes		7%	
60 to 89 minutes		6%	
90 or more minutes		1%	

Gateway District

Population	Source	Gateway	Comments
Top Five Tapestry Segments with % of households	9		
Cozy and Comfortable		35%	Couples w/w out kids live in urban clusters in metro areas w/ short commute times (homeowners)
Aspiring Young Families		29%	Creates demand for entry level homes and apartments (townhomes, apartments and condos)
Main Street USA		19%	Suburban move up buyers (homeowners)
Milk and Cookies		12%	Married couples with children (owners of single family homes)
Midland Crowd		4%	Married couples with and without children and singles (owners of single family homes and mobile)
Housing Characteristics	**Source**	**Gateway**	**Comments**
Total Population (2005-2009 Averaged)	2	6,595	
Population 50 + (2010 Estimated)	7	2,095	32% over the age of 50
Total Housing Units (2005-2009 Averaged)	2	2,572	
Owner Occupied Housing (2005-2009 Averaged)	2	57%	Majority home owners
Renter Occupied Housing (2005-2009 Averaged)	2	40%	
Vacant Housing		3%	
55+ Household (2010 Estimated)	7	36%	
Median Home Value (2005-2009 Averaged)	2	$ 211,585	
Household Size		2.56	divided housing units by population: 2.63 if only using households
Housing Units by Units in Structure (2005-2009 Estimated)			
Total	2	2,572	
1, Detached		59%	
1, Attached		7%	
2		4%	
3 or 4		7%	
5 to 9		2%	
10 to 19		5%	
20 to 49		3%	
50 or more		0%	
Mobile Home		11%	
Boat, RV, Van, etc.		1%	
Housing Units by Year Structure Built	2		
Total		2,572	
Built in 2005 or later		1%	Very little new housing
Built 2000 to 2004		7%	
Built 1990 to 1999		10%	
Built 1980 to 1989		14%	
Built 1970 to 1979		44%	
Built 1960 to 1969		15%	
Built 1950 to 1959		6%	
Built 1940 to 1949		1%	
Built 1939 or earlier		2%	
Median year structure built		1976	

Gateway District

Housing Characteristics	Source	Gateway	Comments
Owner Occupied Housing Units by Year Householder Moved into Unit	2		
Total		1,471	
2005 or later		7%	Very few people move
2000 to 2004		15%	
1990 to 1999		19%	
1980 to 1989		10%	
1970 to 1979		5%	
1969 or earlier		3%	
Occupied Housing Units by Vehicles Available	2		
Total		2,507	Very automobile dependent
Owner Occupied		1,471	
No Vehicle Available		3%	
1 Vehicle Available		11%	
2 Vehicles Available		19%	
3 Vehicles Available		19%	
4 Vehicles Available		5%	
5 or More Vehicles Available		2%	
Renter Occupied		1,036	
No Vehicle Available		5%	
1 Vehicle Available		18%	
2 Vehicles Available		17%	
3 Vehicles Available		2%	
4 Vehicles Available		0%	
5 or More Vehicles Available		0%	
Current and Future Housing Supply	Source	Gateway	Comments
Recorded remaining finished lots in current selling plats October 1, 2011	6	0	
Total single family detached lots in the pipeline as of October 1, 2011	6	0	
In Final Plat could be recorded within 6 months	6	0	
With Preliminary Plat Approval (could be recorded finished lots within 18 months)	6	0	
In Review Process (could be recorded finished lots by 2014)	6	0	
Number of new unsold multi family as of October 1, 2011	6	0	
Number of multi-family in the pipeline as of October 1, 2011 (apartments, condos, senior)	6	500	Lacey Gateway
Median value of all housing in the County	8	$ 248,700	
Median price of new for sale single family homes available 10/1/2011	8	n/a	
Median price of re-sale single family homes available 10/1/2011	8	$ 139,000	
Median price of new for-sale attached multi-family 10/1/11	6	n/a	
Median price of re-sale condominiums available 10/1/2011	8	$ 105,000	

Gateway District

Community Characteristics	Source	Gateway	Comments
Close to regional transportation		Yes	
Proximity to jobs		t Retail	Retail
Walk Score		65	
Local Amenities does the corridor have:	6		
Parks		No	
Schools		Yes	Elementary, Middle and High School
Neighborhood shopping within walking distance		Yes	Grocery and Restaurants
Medical facilities		Providence	Providence
Lake or bay access		No	
Proximity to the JLMB for people to live		9 Miles	16 miles
Community Center		YMCA & CC	YMCA, Lacey Community Center within 2-miles
Senior Center		No	
SOURCE KEY			
1. US Census			
2. ACS Housing Summary			
3. ACS Population Summary			
4. OFM			
5. Thurston Regional Planning			
6. New Home Trends, Inc.			
7. ESRI 50+ Profile			
8. North West Multiple Listing Service			
9. ESRI forecasts for 2010 & 2015 based on 2000 US Census			

Headwaters/Woodland Corridor

Corridor Population and Attributes	Source	Hwat/Wood	Comments
Population - 2005-2009 Averaged	2	8,193	
Projected Population Growth 2010 - 2020		1,802	Based on County growth of 22% between 2011 and 2020
Projected Population Growth 2021 - 2030		1,852	Based on County growth of 20% between 2021 and 2030
TOTAL PROJECTED POPULATION GROWTH 2010 - 2030		**3,654**	
Housing Units - 2005-2009 Averaged	2	4,008	
Projected average housing demand 2010 - 2020		962	Based on County growth of 24% between 2011 and 2020
Projected average housing demand 2021 - 2030		1,093	Based on County growth of 22% between 2021 and 2030
TOTAL PROJECTED HOUSEHOLD GROWTH 2010 - 2030		**2,055**	
Projected Detached Single Family Demand 2010 - 2030	4 & 5	**206**	10% of household growth
Single family detached 2010 - 2020		92	45% of growth 2011 and 2030 based on County growth trends
Single family detached 2021 - 2030		113	55% of growth 2011 and 2030 based on County growth trends
Projected housing Multi-Family Demand 2010 - 2030	4 & 5	**1,850**	90% of household growth
Multi-family (includes apartments, condos, senior housing) 2010 - 2020		832	45% of growth 2011 and 2030 based on County growth trends
Multi-family (includes apartments, condos, senior housing) 2021 - 2030		1,017	55% of growth 2011 and 2030 based on County growth trends
PROJECTED HOUSING DEMAND BY DENSITY/PRODUCT TYPE			
Identify the projected housing demand by type between 2010-2020			
Single Family Detached (6 Units per acre) Includes carriage units, adult family homes		92	
Townhomes 10 to 15 Units Per Acre (25% of MF demand) includes live work townhomes		208	
Low Rise Buildings 18 Units per acre (50% of MF demand)		416	
Mid Rise Buildings (24 to 36 units per acre wood frame) (25% of MF demand)		208	
High Rise Buildings (9 + floors steel and concrete building) (0% of MF demand)		0	
TOTAL PROJECTED HOUSING DEMAND BETWEEN 2010-2020 (ROUNDED)		**925**	
Identify the projected housing demand by type between 2021-2030			
Single Family Detached (6 Units per acre) Includes carriage units, adult family homes		113	
Townhomes 10 to 15 Units Per Acre (25% of MF demand) includes live work townhomes		254	
Low Rise Buildings 18 Units per acre (50% of MF demand)		509	
Mid Rise Buildings (24 to 36 units per acre wood frame) (25% of MF demand)		254	
High Rise Buildings (9 + floors steel and concrete building) (0% of MF demand)		0	
TOTAL PROJECTED HOUSING DEMAND BETWEEN 2021-2030 (ROUNDED)		**1,130**	
TOTAL PROJECTED HOUSING DEMAND BETWEEN 2010-2030 (ROUNDED)		**2,055**	

To optimize demand and increase liklihood of high density the following community features are needed:

- Parks

- Senior Center

Headwaters/Woodland Corridor

Population	Source	Hwat/Wood	Comments
Estimated Median Age 2010	9	37.1	Older population
Population Age 15+ Years by Marital Status 2005-2009 averaged	2		
Total		6,642	
Married		36%	
Never Married		39%	
Widowed		12%	
Divorced		14%	
Workers Age 16+ by Place of Work 2005-2009 averaged	2	3,642	
Worked in State and County of Residence		75%	
Worked in State and outside County of Residence		24%	Large percentage work out of County
Worked outside state of residence		9%	
Workers Age 16+ years by Means of Transportation to Work 2005-2009 averaged	2		
Total		3,642	
Drove Alone		76%	
Carpooled		9%	
Public Transportation		2%	
Taxicab		0%	
Motorcycle		0%	
Bicycle		2%	
Walked		4%	
Other Means		2%	
Worked at Home		5%	
Workers Age 16+ by travel time to work (not working at home) 2005-2009 averaged	2		
Total		3,448	
Less than 5 minutes		4%	
5 to 9 minutes		16%	
10 to 14 minutes		18%	
15 to 19 minutes		24%	
20 to 24 minutes		10%	
30 to 34 minutes		6%	
35 to 39 minutes		2%	
40 to 44 minutes		4%	
45 to 59 minutes		6%	
60 to 89 minutes		3%	
90 or more minutes		3%	

Headwaters/Woodland Corridor

Population	Source	Hwat/Wood	Comments
Top Five Tapestry Segments with % of households	9		
Old and Newcomers		82%	Urban dwellers live in college towns (townhomes, apartments, older single family homes)
Mainstreet USA		17%	Suburban move-up buyers (homeowners)
In Style		1%	Professional couples with few children who favor urban settings (own townhomes, condos and SFD

Housing Characteristics	Source	Hwat/Wood	Comments
Total Population (2005-2009 Averaged)	2	8,193	
Population 50 + (2010 Estimated)	7	2,846	34 % population over 50
Total Housing Units (2005-2009 Averaged)	2	4,008	
Owner Occupied Housing (2005-2009 Averaged)	2	34%	
Renter Occupied Housing (2005-2009 Averaged)	2	62%	Large rental community
Vacant Housing		4%	
55+ Household (2010 Estimated)	7	39%	
Median Home Value (2005-2009 Averaged)	2	$ 227,261	
Household Size		2.04	divided housing units by population: 2.13 if only using households
Housing Units by Units in Structure (2005-2009 Estimated)			
Total	2	4,008	
1, Detached		37%	
1, Attached		2%	
2		5%	
3 or 4		7%	
5 to 9		10%	
10 to 19		10%	
20 to 49		3%	
50 or more		17%	
Mobile Home		9%	
Boat, RV, Van, etc.		1%	
Housing Units by Year Structure Built	2		
Total		4,008	
Built in 2005 or later		4%	Very little new housing
Built 2000 to 2004		8%	
Built 1990 to 1999		28%	
Built 1980 to 1989		18%	
Built 1970 to 1979		23%	
Built 1960 to 1969		8%	
Built 1950 to 1959		5%	
Built 1940 to 1949		5%	
Built 1939 or earlier		2%	
Median year structure built		1984	

Headwaters/Woodland Corridor

Housing Characteristics	Source	Hwat/Wood	Comments
Occupied Housing Units by Year Householder Moved into Unit	2		
Total		3,846	
2005 or later		7%	
2000 to 2004		9%	
1990 to 1999		12%	
1980 to 1989		6%	
1970 to 1979		2%	
1969 or earlier		7%	
Occupied Housing Units by Vehicles Available	2		
Total		3,846	Very car dependent
Owner Occupied		1362	
No Vehicle Available		1%	
1 Vehicle Available		13%	
2 Vehicles Available		15%	
3 Vehicles Available		6%	
4 Vehicles Available		1%	
5 or More Vehicles Available		0%	
Renter Occupied		2,484	
No Vehicle Available		14%	
1 Vehicle Available		28%	
2 Vehicles Available		20%	
3 Vehicles Available		3%	
4 Vehicles Available		0%	
5 or More Vehicles Available		0%	
Current and Future Housing Supply	Source	Hwat/Wood	Comments
Recorded remaining finished lots in current selling plats October 1, 2011	6	0	
Total single family detached lots in the pipeline as of October 1, 2011	6	34	
In Final Plat could be recorded within 6 months	6	0	
With Preliminary Plat Approval (could be recorded finished lots within 18 months)	6	34	
In Review Process (could be recorded finished lots by 2014)	6	0	
Number of new unsold multi family as of October 1, 2011	6	0	
Number of multi-family in the pipeline as of October 1, 2011 (apartments, condos, senior)	6	51	
Median value of all housing in the County	8	$ 248,700	
Median price of re-sale single family homes available 10/1/2011	8	$ 326,000	Higher priced area
Median price of new for-sale attached multi-family 10/1/11	6	$ 371,400	
Median price of re-sale condominiums available 10/1/2011	8	$210,000	

Headwaters/Woodland Corridor

Community Characteristics	Source	Hwat/Wood	Comments
Close to regional transportation		Yes	
Proximity to jobs		t Retail	Hospital
Walk Score		55	
Local Amenities does the corridor have:	6		
Parks		No	
Schools		Yes	North Thurston High School, Chinook Middle School, Private Schools
Neighborhood shopping within walking distance		Yes	Grocery and Restaurants
Medical facilities		Providence	Providence
Lake or bay access		No	
Proximity to the JLMB for people to live		12 Miles	15 miles
Community Center		Lacey CC	Lacey Community Center within 2-miles
Senior Center		No	Lots of senior housing options
SOURCE KEY			
1. US Census			
2. ACS Housing Summary			
3. ACS Population Summary			
4. OFM			
5. Thurston Regional Planning			
6. New Home Trends, Inc.			
7. ESRI 50+ Profile			
8. North West Multiple Listing Service			
9. ESRI forecasts for 2010 & 2015 based on 2000 US Census			

West Olympia

Corridor Population and Attributes	Source	W. Olympia	Comments
Population - 2005-2009 Averaged	2	10,671	
Projected Population Growth 2010 - 2020		2,348	Based on County growth of 22% between 2011 and 2020
Projected Population Growth 2021 - 2030		1,852	Based on County growth of 20% between 2021 and 2030
TOTAL PROJECTED POPULATION GROWTH 2010 - 2030		**4,199**	
Housing Units - 2005-2009 Averaged	2	4,827	
Projected average housing demand 2010 - 2020		1,158	Based on County growth of 24% between 2011 and 2020
Projected average+A148 housing demand 2021 - 2030		1,317	Based on County growth of 22% between 2021 and 2030
TOTAL PROJECTED HOUSEHOLD GROWTH 2010 - 2030		**2,475**	
Projected Detached Single Family Demand	4 & 5	**371**	15% of household growth
Single family detached 2010 - 2020		167	45% of growth 2011 and 2030 based on County growth trends
Single family detached 2021 - 2030		204	55% of growth 2011 and 2030 based on County growth trends
Projected housing Multi-Family Demand	4 & 5	**2,104**	85% of household growth
Multi-family (includes apartments, condos, senior housing) 2010 - 2020		947	45% of growth 2011 and 2030 based on County growth trends
Multi-family (includes apartments, condos, senior housing) 2021 - 2030		1,157	55% of growth 2011 and 2030 based on County growth trends
PROJECTED HOUSING DEMAND BY DENSITY/PRODUCT TYPE			
Identify the projected housing demand by type between 2010-2020			
Single Family Detached (6 Units per acre) Includes carriage units, adult family homes		167	
Townhomes 10 to 15 Units Per Acre (45% of MF demand) includes live work townhomes		426	
Low Rise Buildings 18 Units per acre (50% of MF demand)		473	
Mid Rise Buildings (24 to 36 units per acre wood frame) (5% of MF demand)		47	
High Rise Buildings (9 + floors steel and concrete building) (0% of MF demand)		0	
TOTAL PROJECTED HOUSING DEMAND BETWEEN 2010-2020 (ROUNDED)		**1,114**	
Identify the projected housing demand by type between 2021-2030			
Single Family Detached (6 Units per acre) Includes carriage units, adult family homes		204	
Townhomes 10 to 15 Units Per Acre (35% of MF demand) includes live work townhomes		405	
Low Rise Buildings 18 Units per acre (50% of MF demand)		579	
Mid Rise Buildings (24 to 36 units per acre wood frame) (15% of MF demand)		174	
High Rise Buildings (9 + floors steel and concrete building) (0% of MF demand)		0	
TOTAL PROJECTED HOUSING DEMAND BETWEEN 2021-2030 (ROUNDED)		**1,361**	
TOTAL PROJECTED HOUSING DEMAND BETWEEN 2031-2040 (ROUNDED)		**2,475**	

West Olympia

Population	Source	W. Olympia	Comments
Estimated Median Age 2010	9	33.3	
Population Age 15+ Years by Marital Status 2005-2009 averaged	2		
Total		8,688	
Married		39%	
Never Married		43%	Between never married and divorced, large single population
Widowed		5%	
Divorced		13%	
Workers Age 16+ by Place of Work 2005-2009 averaged	2	5,162	
Worked in State and County of Residence		86%	
Worked in State and outside County of Residence		14%	
Worked outside state of residence		0%	
Workers Age 16+ years by Means of Transportation to Work 2005-2009 averaged	2		
Total		5,162	
Drove Alone		61%	
Carpooled		14%	
Public Transportation		12%	
Taxicab		0%	
Motorcycle		1%	
Bicycle		5%	
Walked		4%	
Other Means		1%	
Worked at Home		4%	
Workers Age 16+ by travel time to work (not working at home) 2005-2009 averaged	2		
Total		4,937	
Less than 5 minutes		6%	
5 to 9 minutes		17%	
10 to 14 minutes		21%	
15 to 19 minutes		18%	
20 to 24 minutes		11%	
25 to 29 minutes		4%	
30 to 34 minutes		10%	
35 to 39 minutes		2%	
40 to 44 minutes		2%	
45 to 59 minutes		6%	
60 to 89 minutes		3%	
90 or more minutes		2%	

West Olympia

Population	Source	W. Olympia	Comments
Top Five Tapestry Segments with % of households	9		
Enterprising Professionals		35%	Singles - Owners/renters of townhomes and apartments
Metropolitans		29%	Singles or childless couples - owners of single and multi-family homes
Old and Newcomers		19%	Urban dwellers living in college towns - townhomes, apartments, older single family homes
Inner City Tenants		12%	Singles and single parents - renters of apartments
Simple Living		4%	Singles and married couples without children - renters of low rent apartments
Housing Characteristics	**Source**	**W. Olympia**	**Comments**
Total Population (2005-2009 Averaged)	2	10,671	
Population 50 + (2010 Estimated)	7	3,367	31 percent of population over 50
Total Housing Units (2005-2009 Averaged)	2	4,827	
Owner Occupied Housing (2005-2009 Averaged)	2	42%	
Renter Occupied Housing (2005-2009 Averaged)	2	52%	More rental housing in area.
Vacant Housing		6%	
55+ Household (2010 Estimated)	7	31%	
Median Home Value (2005-2009 Averaged)	2	$ 234,991	
Household Size		2.2	divided housing units by population: 2.34 if only using households
Housing Units by Units in Structure (2005-2009 Estimated)			
Total	2	4,827	
1, Detached		49%	
1, Attached		4%	
2		4%	
3 or 4		8%	
5 to 9		10%	
10 to 19		11%	
20 to 49		1%	
50 or more		9%	
Mobile Home		5%	
Boat, RV, Van, etc.		0%	
Housing Units by Year Structure Built	2		
Total		4,827	
Built in 2005 or later		2%	Very little new housing in area
Built 2000 to 2004		7%	
Built 1990 to 1999		17%	
Built 1980 to 1989		21%	
Built 1970 to 1979		17%	
Built 1960 to 1969		5%	
Built 1950 to 1959		9%	
Built 1940 to 1949		9%	
Built 1939 or earlier		13%	
Median year structure built		1978	

West Olympia

Housing Characteristics	Source	W. Olympia	Comments
Owner Occupied Housing Units by Year Householder Moved into Unit	2		
Total		2,025	
2005 or later		6%	
2000 to 2004		14%	Very few homeowners move
1990 to 1999		12%	
1980 to 1989		6%	
1970 to 1979		4%	
1969 or earlier		4%	
Occupied Housing Units by Vehicles Available	2		
Total		4,558	
Owner Occupied		2,025	
No Vehicle Available		2%	
1 Vehicle Available		13%	
2 Vehicles Available		3%	
3 Vehicles Available		5%	
4 Vehicles Available		3%	
5 or More Vehicles Available		0%	
Renter Occupied		2,553	
No Vehicle Available		8%	
1 Vehicle Available		36%	
2 Vehicles Available		9%	
3 Vehicles Available		2%	
4 Vehicles Available		0%	
5 or More Vehicles Available		0%	
Current and Future Housing Supply	**Source**	**W. Olympia**	**Comments**
Recorded remaining finished lots in current selling plats October 1, 2011	6	141	
Total single family detached lots in the pipeline as of October 1, 2011	6	33	
In Final Plat could be recorded within 6 months	6	0	
With Preliminary Plat Approval (could be recorded finished lots within 18 months)	6	24	
In Review Process (could be recorded finished lots by 2014)	6	9	
Number of new unsold multi family as of October 1, 2011	6	0	
Number of multi-family in the pipeline as of October 1, 2011 (apartments, condos, senior)	6	279	Not enough to meet demand
Median value of all housing in the County	8	$ 248,700	
Median price of new for sale single family homes available 10/1/2011	8	$ 224,950	
Median price of re-sale single family homes available 10/1/2011	8	$ 236,975	
Median price of new for-sale attached multi-family 10/1/11	6	n/a	
Median price of re-sale condominiums available 10/1/2011	8	$ 214,975	

West Olympia

Community Characteristics	Source	W. Olympia	Comments
Close to regional transportation		Yes	
Proximity to jobs		Retail	Downtown Olympia - State Capitol
Walk Score		74	
Local Amenities does the corridor have:	6		
Parks		Multiple	Auger Park, Sunrise park, Grass Lake Refuge
Schools		Yes	Elementary, Middle and High School
Neighborhood shopping within walking distance		Yes	Grocery and Restaurants
Medical facilities		Providence	
Lake or bay access		No	
Proximity to the JLMB for people to live		19 Miles	
Community Center		No	
Senior Center		Yes	
SOURCE KEY			
1. US Census			
2. ACS Housing Summary			
West Olympia			
4. OFM			
5. Thurston Regional Planning			
6. New Home Trends, Inc.			
7. ESRI 50+ Profile			
8. North West Multiple Listing Service			
9. ESRI forecasts for 2010 & 2015 based on 2000 US Census			

Tumwater South - Capitol Boulevard

Corridor Population and Attributes	Source	Tumwater	Comments
Population - 2005-2009 Averaged	2	4,869	
Projected Population Growth 2010 - 2020		1,071	Based on County growth of 22% between 2011 and 2020
Projected Population Growth 2021 - 2030		1,852	Based on County growth of 20% between 2021 and 2030
TOTAL PROJECTED POPULATION GROWTH 2010 - 2030		**2,923**	
Housing Units - 2005-2009 Averaged	2	2,237	
Projected Average housing demand 2010 - 2020		537	Based on County growth of 24% between 2011 and 2020
Projected Average housing demand 2021 - 2030		610	Based on County growth of 22% between 2021 and 2030
TOTAL PROJECTED HOUSEHOLD GROWTH 2010 - 2030		**1,147**	
Projected Detached Single Family Demand 2010 - 2030	4 & 5	**172**	15% of household growth
Single family detached 2010 - 2020		77	45% of growth 2011 and 2020 based on County growth trends
Single family detached 2021 - 2030		95	55% of growth 2021 and 2030 based on County growth trends
Projected housing Multi-Family Demand 2010 - 2030	4 & 5	**975**	85% of household growth
Multi-family (includes apartments, condos, senior housing) 2010 - 2020		439	45% of growth 2011 and 2020 based on County growth trends
Multi-family (includes apartments, condos, senior housing) 2021 - 2030		536	55% of growth 2021 and 2030 based on County growth trends
PROJECTED HOUSING DEMAND BY DENSITY/PRODUCT TYPE			
Identify the projected housing demand by type between 2010-2020			
Single Family Detached (6 Units per acre) Includes carriage units, adult family homes		77	
Townhomes 10 to 15 Units Per Acre (25% of MF demand) includes live work townhomes		110	
Low Rise Buildings 18 Units per acre (50% of MF demand)		219	
Mid Rise Buildings (24 to 36 units per acre wood frame) (25% of MF demand)		110	
High Rise Buildings (9 + floors steel and concrete building) (0% of MF demand)		0	
TOTAL PROJECTED HOUSING DEMAND BETWEEN 2010-2020 (ROUNDED)		0	
Identify the projected housing demand by type between 2021-2030			
Single Family Detached (6 Units per acre) Includes carriage units, adult family homes		95	
Townhomes 10 to 15 Units Per Acre (25% of MF demand) includes live work townhomes		134	
Low Rise Buildings 18 Units per acre (60% of MF demand)		322	
Mid Rise Buildings (24 to 36 units per acre wood frame) (15% of MF demand)		80	
High Rise Buildings (9 + floors steel and concrete building) (0% of MF demand)		0	
TOTAL PROJECTED HOUSING DEMAND BETWEEN 2021-2030 (ROUNDED)		**631**	
TOTAL PROJECTED HOUSING DEMAND BETWEEN 2010-2030 (ROUNDED)		**631**	

In order to drive demand for attached high density housing the area needs:
- *Parks*
- *Senior center*
- *Medical facilities*

Tumwater South - Capitol Boulevard

Population	Source	Tumwater	Comments
Estimated Median Age 2010	9	35.1	
Population Age 15+ Years by Marital Status 2005-2009 averaged	2		
Total		4,747	
Married		37%	
Never Married		41%	More singles than married
Widowed		6%	
Divorced		15%	
Workers Age 16+ by Place of Work 2005-2009 averaged	2	2,752	
Worked in State and County of Residence		85%	
Worked in State and outside County of Residence		15%	
Worked outside state of residence		0%	
Workers Age 16+ years by Means of Transportation to Work 2005-2009 averaged	2		
Total		2,752	
Drove Alone		75%	
Carpooled		14%	
Public Transportation		7%	
Taxicab		0%	
Motorcycle		0%	
Bicycle		0%	
Walked		1%	
Other Means		0%	
Worked at Home		3%	
Workers Age 16+ by travel time to work (not working at home) 2005-2009 averaged	2		
Total		2,752	
Less than 5 minutes		2%	
5 to 9 minutes		19%	
10 to 14 minutes		33%	
15 to 19 minutes		16%	
20 to 24 minutes		14%	
25 to 29 minutes		2%	
30 to 34 minutes		3%	
35 to 39 minutes		2%	
40 to 44 minutes		3%	
45 to 59 minutes		2%	
60 to 89 minutes		3%	
90 or more minutes		2%	

Tumwater South - Capitol Boulevard

Population	Source	Tumwater	Comments
Top Five Tapestry Segments with % of households	9		
Aspiring Young Families		44%	Creates demand for entry level homes and apartments (townhomes, apartments and condos)
Inner City Tenants		25%	Singles and single parents - renters of apartments
Main street USA		16%	Suburban move up buyers (homeowners)
Senior Sun Seekers		8%	Married couples and singles without children - owners of single family and mobile homes
In Style		5%	Professional couples with few children. Favor urban setting (owners of townhomes, condos and SF
Housing Characteristics	**Source**	**Tumwater**	**Comments**
Total Population (2005-2009 Averaged)	2	4,869	
Population 50 + (2010 Estimated)	7	1,812	37 percent over 50
Total Housing Units (2005-2009 Averaged)	2	2,918	
Owner Occupied Housing (2005-2009 Averaged)	2	37%	
Renter Occupied Housing (2005-2009 Averaged)	2	56%	Large rental market
Vacant Housing		7%	
55+ Household (2010 Estimated)	7	35%	
Median Home Value (2005-2009 Averaged)	2	$ 177,459	Low home value
Household Size		2.14	divided housing units by population: 2.34 if only using households
Housing Units by Units in Structure (2005-2009 Estimated)			
Total	2	2,237	
1, Detached		40%	
1, Attached		5%	
2		4%	
3 or 4		7%	
5 to 9		12%	
10 to 19		7%	
20 to 49		1%	
50 or more		12%	
Mobile Home		11%	
Boat, RV, Van, etc.		1%	
Housing Units by Year Structure Built	2		
Total		2,237	
Built in 2005 or later		1%	Very little new housing
Built 2000 to 2004		2%	
Built 1990 to 1999		9%	
Built 1980 to 1989		22%	
Built 1970 to 1979		36%	
Built 1960 to 1969		15%	
Built 1950 to 1959		8%	
Built 1940 to 1949		4%	
Built 1939 or earlier		3%	
Median year structure built		1975	

Tumwater South - Capitol Boulevard

Housing Characteristics	Source	Tumwater	Comments
Owner Occupied Housing Units by Year Householder Moved into Unit	2		
Total		833	
2005 or later		8%	Very few homeowners move
2000 to 2004		9%	
1990 to 1999		8%	
1980 to 1989		7%	
1970 to 1979		5%	
1969 or earlier		4%	
Occupied Housing Units by Vehicles Available	2		
Total		2,076	
Owner Occupied		833	
No Vehicle Available		1%	
1 Vehicle Available		15%	
2 Vehicles Available		12%	
3 Vehicles Available		11%	
4 Vehicles Available		2%	
5 or More Vehicles Available		1%	
Renter Occupied		1,243	
No Vehicle Available		9%	
1 Vehicle Available		34%	
2 Vehicles Available		12%	
3 Vehicles Available		4%	
4 Vehicles Available		1%	
5 or More Vehicles Available		0%	

Current and Future Housing Supply	Source	Tumwater	Comments
Recorded remaining finished lots in current selling plats October 1, 2011	6	7	
Total single family detached lots in the pipeline as of October 1, 2011	6	121	
In Final Plat could be recorded within 6 months	6	0	
With Preliminary Plat Approval (could be recorded finished lots within 18 months)	6	121	
In Review Process (could be recorded finished lots by 2014)	6	0	
Number of new unsold multi family as of October 1, 2011	6	0	
Number of multi-family in the pipeline as of October 1, 2011 (apartments, condos, senior)	6	40	
Median value of all housing in the County	8	$ 248,700	
Median price of new for sale single family homes available 10/1/2011	8	$ 349,950	
Median price of re-sale single family homes available 10/1/2011	8	$ 164,900	
Median price of new for-sale attached multi-family 10/1/11	6	N/A	
Median price of re-sale condominiums available 10/1/2011	8	N/A	

Tumwater South - Capitol Boulevard

Community Characteristics	Source	Tumwater	Comments
Close to regional transportation		Some	
Proximity to jobs		t Retail	Downtown Olympia < 3 miles
Walk Score		69	69 out of 100
Local Amenities does the corridor have:	6		
Parks		No	
Schools		Yes	Elementary, Middle and High School
Neighborhood shopping within walking distance		Yes	Grocery and Restaurants
Medical facilities		No	
Lake or bay access		No	
Proximity to the JLMB for people to live		20 Miles	
Community Center		No	
Senior Center		No	
SOURCE KEY			
1. US Census			
2. ACS Housing Summary			
3. ACS Population Summary			
4. OFM			
5. Thurston Regional Planning			
6. New Home Trends, Inc.			
7. ESRI 50+ Profile			
8. North West Multiple Listing Service			
9. ESRI forecasts for 2010 & 2015 based on 2000 US Census			

Brewery District

Corridor Population and Attributes	Source	Brewery	Comments
Population - 2005-2009 Averaged	2	6,526	
Projected Population Growth 2010 - 2020		1,436	Based on County growth of 22% between 2011 and 2020
Projected Population Growth 2021 - 2030		1,852	Based on County growth of 20% between 2021 and 2030
TOTAL PROJECTED POPULATION GROWTH 2010 - 2030		**3,287**	
Housing Units - 2005-2009 Averaged	2	2,918	
Projected average housing demand 2010 - 2020		700	Based on County growth of 24% between 2011 and 2020
Projected average housing demand 2021 - 2030		796	Based on County growth of 22% between 2021 and 2030
TOTAL PROJECTED HOUSEHOLD GROWTH 2010 - 2030		**1,496**	
Projected Detached Single Family Demand 2010 - 2030	4 & 5	**374**	25% of household growth
Single family detached 2010 - 2020		168	45% of growth 2011 and 2030 based on County growth trends
Single family detached 2021 - 2030		206	55% of growth 2011 and 2030 based on County growth trends
Projected housing Multi-Family Demand 2010 - 2030	4 & 5	**1,122**	75% of household growth
Multi-family (includes apartments, condos, senior housing) 2010 - 2020		505	45% of growth 2011 and 2030 based on County growth trends
Multi-family (includes apartments, condos, senior housing) 2021 - 2030		617	55% of growth 2011 and 2030 based on County growth trends
PROJECTED HOUSING DEMAND BY DENSITY/PRODUCT TYPE			
Identify the projected housing demand by type between 2010-2020			
Single Family Detached (6 Units per acre) Includes carriage units, adult family homes		168	
Townhomes 10 to 15 Units Per Acre (25% of MF demand) includes live work townhomes		126	
Low Rise Buildings 18 Units per acre (50% of MF demand)		253	
Mid Rise Buildings (24 to 36 units per acre wood frame) (25% of MF demand)		126	
High Rise Buildings (9 + floors steel and concrete building) (0% of MF demand)		0	
TOTAL PROJECTED HOUSING DEMAND BETWEEN 2010-2020 (ROUNDED)		**673**	
Identify the projected housing demand by type between 2021-2030			
Single Family Detached (6 Units per acre) Includes carriage units, adult family homes		206	
Townhomes 10 to 15 Units Per Acre (25% of MF demand) includes live work townhomes		154	
Low Rise Buildings 18 Units per acre (50% of MF demand)		309	
Mid Rise Buildings (24 to 36 units per acre wood frame) (25% of MF demand)		154	
High Rise Buildings (9 + floors steel and concrete building) (0% of MF demand)		0	
TOTAL PROJECTED HOUSING DEMAND BETWEEN 2021-2030 (ROUNDED)		**823**	
TOTAL PROJECTED HOUSING DEMAND BETWEEN 2010-2030 (ROUNDED)		**1,496**	

To optimize demand and increase the likelyhood of higher density the following community features are needed:

- *Parks*
- *Community center*
- *Medical facilities*
- *More local shopping*

Brewery District

Population	Source	Brewery	Comments
Estimated Median Age 2010	9	37.9	
Population Age 15+ Years by Marital Status 2005-2009 averaged	2		
Total		5,397	
Married		29%	
Never Married		52%	Large percentage of singles
Widowed		5%	
Divorced		14%	
Workers Age 16+ by Place of Work 2005-2009 averaged	2	3,712	
Worked in State and County of Residence		81%	
Worked in State and outside County of Residence		18%	
Worked outside state of residence		1%	
Workers Age 16+ years by Means of Transportation to Work 2005-2009 averaged	2		
Total		3,712	
Drove Alone		68%	
Carpooled		17%	
Public Transportation		6%	
Taxicab		0%	
Motorcycle		1%	
Bicycle		2%	
Walked		4%	
Other Means		0%	
Worked at Home		3%	
Workers Age 16+ by travel time to work (not working at home) 2005-2009 averaged	2		
Total		3,614	
Less than 5 minutes		3%	
5 to 9 minutes		19%	
10 to 14 minutes		34%	
15 to 19 minutes		16%	
20 to 24 minutes		11%	
25 to 29 minutes		4%	
30 to 34 minutes		4%	
35 to 39 minutes		1%	
40 to 44 minutes		2%	
45 to 59 minutes		2%	
60 to 89 minutes		3%	
90 or more minutes		2%	

Brewery District

Population	Source	Brewery	Comments
Top Five Tapestry Segments with % of households	9		
Enterprising Professionals		26%	Singles in high density metropolitan areas (owners /renters of townhomes apartments)
Prosperous Empty Nesters		16%	Well educated married couples still working, live in older single family (homeowners)
In Style		14%	Professional couples with few children who favor urban settings (owners of townhomes, condos, SF
Main Street USA		13%	Suburban move up buyers (homeowners)
Aspiring Young Families		12%	Creates demand for entry level homes and apartments (townhomes, apartments, condos)
Housing Characteristics	**Source**	**Brewery**	**Comments**
Total Population (2005-2009 Averaged)	2	6,526	
Population 50 + (2010 Estimated)	7	2,363	36% of population over 50
Total Housing Units (2005-2009 Averaged)	2	2,918	
Owner Occupied Housing (2005-2009 Averaged)	2	58%	Large percentage of homeowners
Renter Occupied Housing (2005-2009 Averaged)	2	37%	
Vacant Housing		5%	Remaining after owner/renter occupied
55+ Household (2010 Estimated)	7	35%	
Median Home Value (2005-2009 Averaged)	2	$ 289,560	
Household Size		2.23	divided housing units by population: 2.37 if only using households
Housing Units by Units in Structure (2005-2009 Estimated)			
Total	2	2,918	
1, Detached		64%	Area comprised of mainly single family
1, Attached		7%	
2		6%	
3 or 4		3%	
5 to 9		6%	
10 to 19		10%	
20 to 49		1%	
50 or more		4%	
Mobile Home		0%	
Boat, RV, Van, etc.		0%	
Housing Units by Year Structure Built	2		
Total		2,918	
Built in 2005 or later		3%	Very few new homes
Built 2000 to 2004		6%	
Built 1990 to 1999		19%	
Built 1980 to 1989		11%	
Built 1970 to 1979		11%	
Built 1960 to 1969		10%	
Built 1950 to 1959		11%	
Built 1940 to 1949		10%	
Built 1939 or earlier		19%	
Median year structure built		1970	

Brewery District

Housing Characteristics	Source	Brewery	Comments
Owner Occupied Housing Units by Year Householder Moved into Unit	2		
Total		1,678	
2005 or later		9%	
2000 to 2004		20%	Most households have lived in their homes for 10+ years
1990 to 1999		16%	
1980 to 1989		9%	
1970 to 1979		4%	
1969 or earlier		3%	
Occupied Housing Units by Vehicles Available	2		
Total		2,754	
Owner Occupied		1,678	
No Vehicle Available		0%	
1 Vehicle Available		17%	
2 Vehicles Available		26%	
3 Vehicles Available		14%	
4 Vehicles Available		4%	
5 or More Vehicles Available		1%	
Renter Occupied		1,076	
No Vehicle Available		5%	
1 Vehicle Available		22%	
2 Vehicles Available		10%	
3 Vehicles Available		3%	
4 Vehicles Available		0%	
5 or More Vehicles Available		0%	
Current and Future Housing Supply	**Source**	**Brewery**	**Comments**
Recorded remaining finished lots in current selling plats October 1, 2011	6	239	
Total single family detached lots in the pipeline as of October 1, 2011	6	18	Very little pipeline inventory
In Final Plat could be recorded within 6 months	6	0	
With Preliminary Plat Approval (could be recorded finished lots within 18 months)	6	18	
In Review Process (could be recorded finished lots by 2014)	6	0	
Number of new unsold multi family as of October 1, 2011	6	0	
Number of multi-family in the pipeline as of October 1, 2011 (apartments, condos, senior)	6	51	Very little pipeline inventory
Median value of all housing in the County	8	$ 248,700	
Median price of new for sale single family homes available 10/1/2011	8	$ 250,132	
Median price of re-sale single family homes available 10/1/2011	8	$ 199,500	
Median price of new for-sale attached multi-family 10/1/11	6	N/A	
Median price of re-sale condominiums available 10/1/2011	8	$ 69,900	

Brewery District

Community Characteristics	Source	Brewery	Comments
Close to regional transportation		Yes	
Proximity to jobs		t	Government Offices
Walk Score		52	
Local Amenities does the corridor have:	6		
Parks		No	
Schools		Yes	Elementary, Middle and High School
Neighborhood shopping within walking distance		Yes	Grocery and Restaurants
Medical facilities		5-miles	5-miles away
Lake or bay access		No	
Proximity to the JLMB for people to live		17 Miles	
Community Center		No	
Senior Center		No	
SOURCE KEY			
1. US Census			
2. ACS Housing Summary			
3. ACS Population Summary			
4. OFM			
5. Thurston Regional Planning			
6. New Home Trends, Inc.			
7. ESRI 50+ Profile			
8. North West Multiple Listing Service			
9. ESRI forecasts for 2010 & 2015 based on 2000 US Census			

Yelm Downtown

Corridor Population and Attributes	Source	Yelm DT	Comments
Population - 2005-2009 Averaged	2	4,629	
Projected Population Growth 2010 - 2020		1,018	Based on County growth of 22% between 2011 and 2020
Projected Population Growth 2021 - 2030		1,129	Based on County growth of 20% between 2021 and 2030
TOTAL PROJECTED POPULATION GROWTH 2010 - 2030		**2,148**	
Housing Units - 2005-2009 Averaged	2	1,708	
Projected Medium housing demand 2010 - 2020		410	Based on County growth of 24% between 2011 and 2020
Projected Medium housing demand 2021 - 2030		466	Based on County growth of 22% between 2021 and 2030
TOTAL PROJECTED HOUSEHOLD GROWTH 2010 - 2030		**876**	
Projected Detached Single Family Demand	4 & 5	**657**	75% of household growth
Single family detached 2010 - 2020		296	45% of growth 2011 and 2030 based on County growth trends
Single family detached 2021 - 2030		361	55% of growth 2011 and 2030 based on County growth trends
Projected housing Multi-Family Demand	4 & 5	**219**	25% of household growth
Multi-family (includes apartments, condos, senior housing) 2010 - 2020		99	45% of growth 2011 and 2030 based on County growth trends
Multi-family (includes apartments, condos, senior housing) 2021 - 2030		120	55% of growth 2011 and 2030 based on County growth trends
PROJECTED HOUSING DEMAND BY DENSITY/PRODUCT TYPE			
Identify the projected housing demand by type between 2010-2020			
Single Family Detached (6 Units per acre) Includes carriage units, adult family homes		296	
Townhomes 10 to 15 Units Per Acre (40% of MF demand) includes live work townhomes		39	
Low Rise Buildings 18 Units per acre (50% of MF demand)		49	
Mid Rise Buildings (24 to 36 units per acre wood frame) (10% of MF demand)		10	
High Rise Buildings (9 + floors steel and concrete building) (0% of MF demand)		0	
TOTAL PROJECTED HOUSING DEMAND BETWEEN 2010-2020 (ROUNDED)		**394**	
Identify the projected housing demand by type between 2021-2030			
Single Family Detached (6 Units per acre) Includes carriage units, adult family homes		**361**	
Townhomes 10 to 15 Units Per Acre (35% of MF demand) includes live work townhomes		**42**	
Low Rise Buildings 18 Units per acre (50% of MF demand)		**60**	
Mid Rise Buildings (24 to 36 units per acre wood frame) (15% of MF demand)		**18**	
High Rise Buildings (9 + floors steel and concrete building) (0% of MF demand)		**0**	
TOTAL PROJECTED HOUSING DEMAND BETWEEN 2021-2030 (ROUNDED)		**482**	
TOTAL PROJECTED HOUSING DEMAND BETWEEN 2010-2030 (ROUNDED)		**876**	

This area will attract JBLM personel because of location and price. There will also be a market for senior housing and apartments within the next 20 years.

Yelm Downtown

Population	Source	Yelm	Comments
Estimated Median Age 2010	9	40.4	
Population Age 15+ Years by Marital Status 2005-2009 averaged	2		
Total		3,491	
Married		21%	
Never Married		62%	
Widowed		5%	
Divorced		12%	
Workers Age 16+ by Place of Work 2005-2009 averaged	2	1,917	
Worked in State and County of Residence		51%	
Worked in State and outside County of Residence		48%	
Worked outside state of residence		80%	
Workers Age 16+ years by Means of Transportation to Work 2005-2009 averaged	2		
Total		1,917	
Drove Alone		76%	
Carpooled		13%	
Public Transportation		1%	
Taxicab		0%	
Motorcycle		0%	
Bicycle		1%	
Walked		6%	
Other Means		2%	
Worked at Home		2%	
Workers Age 16+ by travel time to work (not working at home) 2005-2009 averaged	2		
Total		1,888	
Less than 5 minutes		8%	
5 to 9 minutes		9%	
10 to 14 minutes		9%	
15 to 19 minutes		2%	
20 to 24 minutes		6%	
25 to 29 minutes		5%	
30 to 34 minutes		15%	
35 to 39 minutes		9%	
40 to 44 minutes		12%	
45 to 59 minutes		14%	
60 to 89 minutes		9%	
90 or more minutes		4%	

Yelm Downtown

Population	Source	Yelm DT	Comments
Top Five Tapestry Segments with % of households	9		
Main Street USA		54%	Suburban move up buyers (Homeowners)
Midland Crowd		46%	Married couples with and without children and singles (owners of single family homes and mobile

Housing Characteristics	Source	Yelm DT	Comments
Total Population (2005-2009 Averaged)	2	4,629	
Population 50 + (2010 Estimated)	7	1,215	
Total Housing Units (2005-2009 Averaged)	2	1,708	
Owner Occupied Housing (2005-2009 Averaged)	2	67%	
Renter Occupied Housing (2005-2009 Averaged)	2	21%	
Vacant Housing		12%	
55+ Household (2010 Estimated)	7	35%	
Median Home Value (2005-2009 Averaged)	2	$ 215,852	
Household Size		2.71	divided housing units by population: 3.28 if only using households
Housing Units by Units in Structure (2005-2009 Estimated)			
Total	2	1,708	
1, Detached		72%	
1, Attached		3%	
2		2%	
3 or 4		1%	
5 to 9		28%	
10 to 19		2%	
20 to 49		0%	
50 or more		2%	
Mobile Home		17%	
Boat, RV, Van, etc.		0%	
Housing Units by Year Structure Built	2		
Total		1,708	
Built in 2005 or later		10%	
Built 2000 to 2004		20%	
Built 1990 to 1999		24%	
Built 1980 to 1989		15%	
Built 1970 to 1979		15%	
Built 1960 to 1969		4%	
Built 1950 to 1959		3%	
Built 1940 to 1949		3%	
Built 1939 or earlier		6%	
Median year structure built		1992	

Yelm Downtown

Housing Characteristics	Source	Yelm DT	Comments
Owner Occupied Housing Units by Year Householder Moved into Unit	2		
Total		1,160	
2005 or later		21%	
2000 to 2004		23%	
1990 to 1999		23%	
1980 to 1989		4%	
1970 to 1979		5%	
1969 or earlier		1%	
Occupied Housing Units by Vehicles Available	2		
Total		1,519	
Owner Occupied		1,160	
No Vehicle Available		2%	
1 Vehicle Available		11%	
2 Vehicles Available		34%	
3 Vehicles Available		14%	
4 Vehicles Available		9%	
5 or More Vehicles Available		6%	
Renter Occupied		359	
No Vehicle Available		3%	
1 Vehicle Available		8%	
2 Vehicles Available		9%	
3 Vehicles Available		3%	
4 Vehicles Available		0%	
5 or More Vehicles Available		0%	
Current and Future Housing Supply	Source	Yelm DT	Comments
Recorded remaining finished lots in current selling plats October 1, 2011	6	310	
Total single family detached lots in the pipeline as of October 1, 2011	6	5248	
In Final Plat could be recorded within 6 months	6	0	
With Preliminary Plat Approval (could be recorded finished lots within 18 months)	6	193	
In Review Process (could be recorded finished lots by 2014)	6	5031	5,000 within MPC of Thurston Highlands which is in litigation
Number of new unsold multi family as of October 1, 2011	6	0	
Number of multi-family in the pipeline as of October 1, 2011 (apartments, condos, senior)	6	40	Apartments
Median value of all housing in the County	8	$ 248,700	
Median price of new for sale single family homes available 10/1/2011	8	$ 209,263	
Median price of re-sale single family homes available 10/1/2011	8	$ 179,900	
Median price of new for-sale attached multi-family 10/1/11	6	N/A	
Median price of re-sale condominiums available 10/1/2011	8	N/A	

Yelm Downtown

Community Characteristics	Source	Yelm DT	Comments
Close to regional transportation		Yes	On bus line
Proximity to jobs		JBLM	Goods and Services, Fort Lewis
Walk Score		80	
Local Amenities does the corridor have:	6		
Parks		No	
Schools		Yes	Elementary, Middle and High School
Neighborhood shopping within walking distance		Yes	
Medical facilities		No	
Lake or bay access		No	
Proximity to the JLMB for people to live		5 Miles	
Community Center		No	
Senior Center		Yes	Yelm Adult Community Center
SOURCE KEY			
1. US Census			
2. ACS Housing Summary			
3. ACS Population Summary			
4. OFM			
5. Thurston Regional Planning			
6. New Home Trends, Inc.			
7. ESRI 50+ Profile			
8. North West Multiple Listing Service			
9. ESRI forecasts for 2010 & 2015 based on 2000 US Census			

Tenino District

Corridor Population and Attributes	Source	Tenino	Comments
Population - 2005-2009 Averaged	2	1,545	
Projected Population Growth 2010 - 2020		340	Based on County growth of 22% between 2011 and 2020
Projected Population Growth 2021 - 2030		377	Based on County growth of 20% between 2021 and 2030
TOTAL PROJECTED POPULATION GROWTH 2010 - 2030		**717**	
Housing Units - 2005-2009 Averaged	2	704	
Projected average housing demand 2010 - 2020		169	Based on County growth of 24% between 2011 and 2020
Projected average housing demand 2021 - 2030		192	Based on County growth of 22% between 2021 and 2030
TOTAL PROJECTED HOUSEHOLD GROWTH 2010 - 2030		**361**	
Projected Detached Single Family Demand	4 & 5	**271**	75% of household growth
Single family detached 2010 - 2020		122	45% of growth 2011 and 2030 based on County growth trends
Single family detached 2021 - 2030		149	55% of growth 2011 and 2030 based on County growth trends
Projected housing Multi-Family Demand	4 & 5	**90**	25% of household growth
Multi-family (includes apartments, condos, senior housing) 2010 - 2020		41	45% of growth 2011 and 2030 based on County growth trends
Multi-family (includes apartments, condos, senior housing) 2021 - 2030		50	55% of growth 2011 and 2030 based on County growth trends
PROJECTED HOUSING DEMAND BY DENSITY/PRODUCT TYPE			
Identify the projected housing demand by type between 2010-2020			
Single Family Detached (6 Units per acre) Includes carriage units, adult family homes		122	
Townhomes 10 to 15 Units Per Acre (25% of MF demand) includes live work townhomes		10	
Low Rise Buildings 18 Units per acre (75% of MF demand)		30	
Mid Rise Buildings (24 to 36 units per acre wood frame) (0% of MF demand)		0	
High Rise Buildings (9 + floors steel and concrete building) (0% of MF demand)		0	
TOTAL PROJECTED HOUSING DEMAND BETWEEN 2010-2020 (ROUNDED)		162	
Identify the projected housing demand by type between 2021-2030			
Single Family Detached (6 Units per acre) Includes carriage units, adult family homes		149	
Townhomes 10 to 15 Units Per Acre (25% of MF demand) includes live work townhomes		12	
Low Rise Buildings 18 Units per acre (75% of MF demand)		37	
Mid Rise Buildings (24 to 36 units per acre wood frame) (0% of MF demand)		0	
High Rise Buildings (9 + floors steel and concrete building) (0% of MF demand)		0	
TOTAL PROJECTED HOUSING DEMAND BETWEEN 2021-2030 (ROUNDED)		199	
TOTAL PROJECTED HOUSING DEMAND BETWEEN 2010-2030 (ROUNDED)		361	

Area does not support high density with the exception of senior housing witin next 20 years.

Tenino District

Population	Source	Tenino	Comments
Estimated Median Age 2010	9	40.4	
Population Age 15+ Years by Marital Status 2005-2009 averaged	2		
Total		1,282	
Married		25%	
Never Married		55%	
Widowed		5%	
Divorced		15%	
Workers Age 16+ by Place of Work 2005-2009 averaged	2	807	
Worked in State and County of Residence		83%	
Worked in State and outside County of Residence		15%	
Worked outside state of residence		2%	
Workers Age 16+ years by Means of Transportation to Work 2005-2009 averaged	2		
Total		807	
Drove Alone		71%	
Carpooled		18%	
Public Transportation		0%	
Taxicab		0%	
Motorcycle		0%	
Bicycle		1%	
Walked		3%	
Other Means		1%	
Worked at Home		5%	
Workers Age 16+ by travel time to work (not working at home) 2005-2009 averaged	2		
Total		807	
Less than 5 minutes		3%	
5 to 9 minutes		8%	
10 to 14 minutes		6%	
15 to 19 minutes		9%	
20 to 24 minutes		18%	
25 to 29 minutes		11%	
30 to 34 minutes		23%	
35 to 39 minutes		4%	
40 to 44 minutes		2%	
45 to 59 minutes		9%	
60 to 89 minutes		4%	
90 or more minutes		5%	

Tenino District

Population	Source	Tenino	Comments
Top Five Tapestry Segments with % of households	9		
Midland Crowd		100%	

Housing Characteristics	Source	Tenino	Comments
Total Population (2005-2009 Averaged)	2	1,545	
Population 50 + (2010 Estimated)	7	605	
Total Housing Units (2005-2009 Averaged)	2	704	
Owner Occupied Housing (2005-2009 Averaged)	2	67%	
Renter Occupied Housing (2005-2009 Averaged)	2	26%	Used total renter occupied from ACS - 180
Vacant Housing		7%	Remaining after owner/renter occupied
55+ Household (2010 Estimated)	7	41%	
Median Home Value (2005-2009 Averaged)	2	$ 193,269	
Household Size		2.19	divided housing units by population: 2.38 if only using households
Housing Units by Units in Structure (2005-2009 Estimated)			
Total	2	704	
1, Detached		69%	
1, Attached		1%	
2		2%	
3 or 4		1%	
5 to 9		3%	
10 to 19		4%	
20 to 49		0%	
50 or more		0%	
Mobile Home		20%	
Boat, RV, Van, etc.		0%	
Housing Units by Year Structure Built	2		
Total		704	
Built in 2005 or later		4%	
Built 2000 to 2004		12%	
Built 1990 to 1999		34%	
Built 1980 to 1989		11%	
Built 1970 to 1979		23%	
Built 1960 to 1969		3%	
Built 1950 to 1959		1%	
Built 1940 to 1949		1%	
Built 1939 or earlier		13%	
Median year structure built		1978	

Tenino District

Housing Characteristics	Source	Tenino	Comments
Owner Occupied Housing Units by Year Householder Moved into Unit	2		
Total		650	
2005 or later		13%	
2000 to 2004		14%	
1990 to 1999		18%	
1980 to 1989		18%	
1970 to 1979		6%	
1969 or earlier		3%	
Occupied Housing Units by Vehicles Available	2		
Total		650	
Owner Occupied		470	
No Vehicle Available		2%	
1 Vehicle Available		15%	
2 Vehicles Available		24%	
3 Vehicles Available		16%	
4 Vehicles Available		9%	
5 or More Vehicles Available		5%	
Renter Occupied		180	
No Vehicle Available		1%	
1 Vehicle Available		17%	
2 Vehicles Available		8%	
3 Vehicles Available		1%	
4 Vehicles Available		1%	
5 or More Vehicles Available		0%	
Current and Future Housing Supply	Source	Tenino	Comments
Recorded remaining finished lots in current selling plats October 1, 2011	6	0	
Total single family detached lots in the pipeline as of October 1, 2011	6	18	
In Final Plat could be recorded within 6 months	6	0	
With Preliminary Plat Approval (could be recorded finished lots within 18 months)	6	18	
In Review Process (could be recorded finished lots by 2014)	6	0	
Number of new unsold multi family as of October 1, 2011	6	0	
Number of multi-family in the pipeline as of October 1, 2011 (apartments, condos, senior)	6	0	
Median value of all housing in the County	8	$ 248,700	
Median price of new for sale single family homes available 10/1/2011	8	n/a	
Median price of re-sale single family homes available 10/1/2011	8	$ 183,750	
Median price of new for-sale attached multi-family 10/1/11	6	n/a	
Median price of re-sale condominiums available 10/1/2011	8	n/a	

Tenino District

Community Characteristics	Source	Tenino	Comments
Close to regional transportation		Yes	
Proximity to jobs		JBLM	Downtown Olympia and Fort Lewis
Walk Score		62	
Local Amenities does the corridor have:	6		
Parks		Yes	
Schools		Yes	Elementary, Middle and High School
Neighborhood shopping within walking distance		Yes	Goods and Services
Medical facilities		No	
Lake or bay access		No	
Proximity to the JLMB for people to live		18 Miles	
Community Center		No	
Senior Center		No	
SOURCE KEY			
1. US Census			
2. ACS Housing Summary			
3. ACS Population Summary			
4. OFM			
5. Thurston Regional Planning			
6. New Home Trends, Inc.			
7. ESRI 50+ Profile			
8. North West Multiple Listing Service			
9. ESRI forecasts for 2010 & 2015 based on 2000 US Census			

Rainier District

Corridor Population and Attributes	Source	Rainier	Comments
Population - 2005-2009 Averaged	2	1,576	
Projected Population Growth 2010 - 2020		347	Based on County growth of 22% between 2011 and 2020
Projected Population Growth 2021 - 2030		385	Based on County growth of 20% between 2021 and 2030
TOTAL PROJECTED POPULATION GROWTH 2010 - 2030		**731**	
Housing Units - 2005-2009 Averaged	2	648	
Projected Average housing demand 2010 - 2020		156	Based on County growth of 24% between 2011 and 2020
Projected Average housing demand 2021 - 2030		177	Based on County growth of 22% between 2021 and 2030
TOTAL PROJECTED HOUSEHOLD GROWTH 2010 - 2030		**332**	
Projected Detached Single Family Demand 2010 - 2030	4 & 5	**249**	75% of household growth
Single family detached 2010 - 2020		112	45% of growth 2011 and 2030 based on County growth projections
Single family detached 2021 - 2030		137	55% of growth 2011 and 2030 based on County growth projections
Projected housing Multi-Family Demand 2010 - 2030	4 & 5	**83**	25% of household growth
Multi-family (includes apartments, condos, senior housing) 2010 - 2020		37	45% of growth 2011 and 2030 based on County growth projections
Multi-family (includes apartments, condos, senior housing) 2021 - 2030		46	55% of growth 2011 and 2030 based on County growth projections
PROJECTED HOUSING DEMAND BY DENSITY/PRODUCT TYPE			
Identify the projected housing demand by type between 2010-2020			
Single Family Detached (6 Units per acre) Includes carriage units, adult family homes		112	
Townhomes 10 to 15 Units Per Acre (0% of MF demand) includes live work townhomes			
Low Rise Buildings 18 Units per acre (100% of MF demand)		37	
Mid Rise Buildings (24 to 36 units per acre wood frame) (0% of MF demand)			
High Rise Buildings (9 + floors steel and concrete building) (0% of MF demand)			
TOTAL PROJECTED HOUSING DEMAND BETWEEN 2021-2030 (ROUNDED)		**150**	
Identify the projected housing demand by type between 2021 - 2030			
Single Family Detached (6 Units per acre) Includes carriage units, adult family homes		137	
Townhomes 10 to 15 Units Per Acre (0% of MF demand) includes live work townhomes			
Low Rise Buildings 18 Units per acre (100% of MF demand)		46	
Mid Rise Buildings (24 to 36 units per acre wood frame) (0% of MF demand)			
High Rise Buildings (9 + floors steel and concrete building) (0% of MF demand)			
TOTAL PROJECTED HOUSING DEMAND BETWEEN 2021-2030 (ROUNDED)		**183**	
TOTAL PROJECTED HOUSING DEMAND BETWEEN 2010-2030 (ROUNDED)		**332**	

Rainier District

Population	Source	Rainier	Comments
Estimated Median Age 2010	9	40.8	
Population Age 15+ Years by Marital Status 2005-2009 averaged	2		
Total		1,350	
Married		24%	
Never Married		58%	
Widowed		4%	
Divorced		13%	
Workers Age 16+ by Place of Work 2005-2009 averaged	2	756	
Worked in State and County of Residence		73%	
Worked in State and outside County of Residence		26%	
Worked outside state of residence		1%	
Workers Age 16+ years by Means of Transportation to Work 2005-2009 averaged	2		
Total		756	
Drove Alone		80%	
Carpooled		17%	
Public Transportation		0%	
Taxicab		0%	
Motorcycle		0%	
Bicycle		0%	
Walked		1%	
Other Means		0%	
Worked at Home		1%	
Workers Age 16+ by travel time to work (not working at home) 2005-2009 averaged	2		
Total		750	
Less than 5 minutes		1%	
5 to 9 minutes		6%	
10 to 14 minutes		5%	
15 to 19 minutes		10%	
20 to 24 minutes		21%	
25 to 29 minutes		10%	
30 to 34 minutes		13%	
35 to 39 minutes		7%	
40 to 44 minutes		4%	
45 to 59 minutes		12%	
60 to 89 minutes		7%	
90 or more minutes		5%	

Rainier District

Population	Source	Rainier	Comments
Top Five Tapestry Segments with % of households	9		
Midland Crowd		47%	Rural families in SFD don't move unless necessary
Green Acres		37%	Owners SFD outside Metro areas
Rooted Rural		16%	Married couples w & wo kids, few relocate

Housing Characteristics	Source	Rainier	Comments
Total Population (2005-2009 Averaged)	2	1,576	
Population 50 + (2010 Estimated)	7	677	
Total Housing Units (2005-2009 Averaged)	2	648	
Owner Occupied Housing (2005-2009 Averaged)	2	80%	
Renter Occupied Housing (2005-2009 Averaged)	2	14%	
Vacant Housing		6%	
55+ Household (2010 Estimated)	7	39%	
Median Home Value (2005-2009 Averaged)	2	$ 221,875	
Household Size		2.43	divided housing units by population: 2.59 if only unsung households
Housing Units by Units in Structure (2005-2009 Estimated)			
Total	2	648	
1, Detached		75%	
1, Attached		1%	
2		2%	
3 or 4		0%	
5 to 9		2%	
10 to 19		0%	
20 to 49		0%	
50 or more		0%	
Mobile Home		20%	
Boat, RV, Van, etc.		0%	
Housing Units by Year Structure Built	2		
Total		648	
Built in 2005 or later		4%	
Built 2000 to 2004		12%	
Built 1990 to 1999		34%	
Built 1980 to 1989		11%	
Built 1970 to 1979		23%	
Built 1960 to 1969		3%	
Built 1950 to 1959		1%	
Built 1940 to 1949		1%	
Built 1939 or earlier		13%	
Median year structure built		1990	

Rainier District

Housing Characteristics	Source	Rainier	Comments
Owner Occupied Housing Units by Year Householder Moved into Unit	2		
Total		516	
2005 or later		14%	
2000 to 2004		31%	
1990 to 1999		23%	
1980 to 1989		7%	
1970 to 1979		7%	
1969 or earlier		4%	
Occupied Housing Units by Vehicles Available	2		
Total		608	
Owner Occupied		516	
No Vehicle Available		1%	
1 Vehicle Available		22%	
2 Vehicles Available		27%	
3 Vehicles Available		25%	
4 Vehicles Available		8%	
5 or More Vehicles Available		2%	
Renter Occupied		91	
No Vehicle Available		0%	
1 Vehicle Available		6%	
2 Vehicles Available		6%	
3 Vehicles Available		1%	
4 Vehicles Available		1%	
5 or More Vehicles Available		1%	
Current and Future Housing Supply	Source	Rainier	Comments
Recorded remaining finished lots in current selling plats October 1, 2011	6	60	
Total single family detached lots in the pipeline as of October 1, 2011	6	27	
In Final Plat could be recorded within 6 months	6	0	
With Preliminary Plat Approval (could be recorded finished lots within 18 months)	6	27	
In Review Process (could be recorded finished lots by 2014)	6	0	
Number of new unsold multi family as of October 1, 2011	6	0	
Number of multi-family in the pipeline as of October 1, 2011 (apartments, condos, senior)	6	0	Apartments
Median value of all housing in the County	8	$ 248,700	
Median price of new for sale single family homes available 10/1/2011	8	$ 219,608	
Median price of re-sale single family homes available 10/1/2011	8	$ 179,999	
Median price of new for-sale attached multi-family 10/1/11	6	N/A	
Median price of re-sale condominiums available 10/1/2011	8	N/A	