

Snohomish County

Tomorrow

A GROWTH MANAGEMENT ADVISORY COUNCIL



SNOHOMISH COUNTY TOMORROW 2015 GROWTH MONITORING REPORT

Prepared for Snohomish County Tomorrow
Steering Committee Review on December 2, 2015

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Report Highlights

The *Snohomish County Tomorrow 2015 Growth Monitoring Report* shows that residential and employment growth in Snohomish County has rebounded following a four-year period (2008-2011) of slower growth and development conditions brought about by the 2007-2009 recession.

POPULATION

- Snohomish County's population has grown by an average of 1.2% per year since the 2010 Census to reach 757,600 total residents as of April 1, 2015 – a gain of 44,265 persons. This is a slightly slower pace of population growth than the county experienced during the previous decade.
- Since 2010, the county has grown by an average of about 8,853 new residents per year, with most (61%) of this growth occurring during the past two years (April 2013 – April 2015). This is down from the average increase of 10,731 new residents per year experienced during the past decade.
- The county's population growth since 2010 still accounts for a roughly similar share of statewide population growth (13.1%) as it did in the previous decade (12.9%).
- A majority (56%) of Snohomish County's population resides within cities in 2015, up from 52% in 2000 and 44% in 1990, but down slightly from 58% in 2010.
- As of April 1, 2015, countywide population growth is tracking closely with the 2011-2035 GMA population growth target projection, with the 2015 estimate being only 1% higher (by 7,242 residents) than countywide population projected for 2015.
- Urban growth areas (UGAs) accounted for 91% of the county's population growth between 2011 and 2015 (with 9% going outside the UGA). This closely matches the 2011-2035 projected growth shares for the total UGA and non-UGA (set at 92% and 8%, respectively).
- Within the UGA, a larger share of growth since 2011 has occurred within the SWUGA (73%), and less in the non-SWUGA (18%), compared with the 2011-2035 target shares (62% and 30%, respectively). This is a reversal of 1992-2012 population growth share pattern for the SWUGA vs non-SWUGA, as described in the Appendix to the *2013-2014 SCT Growth Monitoring Report*.
- The planned realignment of a much greater share of 2011-2035 population growth into cities (70%), and less in the unincorporated UGA (22%), contrasts with current trends that show 55% of the county's population growth between 2011 and 2015 occurred in unincorporated UGAs and 36% in cities¹.

¹ The SCT Planning Advisory Committee has tentatively scheduled a work program item in 2016 that will begin to study these discrepancies, evaluate why they are occurring, and develop potential responses to address them, as part of the "Regional Growth Strategy; Allocation Strategy" draft work program item.

EMPLOYMENT

- Following the recession, employment in Snohomish County has grown steadily since 2010, exceeding the previous 2008 peak in 2012, and reaching an annual average 273,300 nonagricultural jobs in 2014.
- The manufacturing sector had the highest rate of job growth between 2010 and 2014, adding 10,500 jobs – a 20% increase since 2010. Manufacturing grew to a 23% share of the county's employment, and Snohomish County's share of the region's manufacturing employment grew to 33%.
- Snohomish County's unemployment rate was back down to 5.1% in 2014, after peaking at 10.7% in 2010 as a result of the recession.
- March 2014 total employment, at 272,957 jobs, was tracking just above (2.1%) the level anticipated for 2014 by the 2011 to 2035 projection for Snohomish County as a whole.

ANNEXATIONS

- After nearly 12 square miles of Snohomish County's UGA were annexed during 2005 – 2007, annexation activity dropped off until 2010 when over 8 square miles were annexed. Annexation activity has again dropped off significantly since 2010.
- The cities of Marysville and Lake Stevens together account for well over half the population (81%) and acres (69%) annexed in the County since January 2000.

RESIDENTIAL DEVELOPMENT

- Following a four-year period (2009-2012) during which the number of single family lots recorded in formal plat subdivisions countywide generally totaled only 1,000 or less (down significantly from the 4,000-4,500 recorded annually during the mid-2000s), recorded lots rose in 2013 to 1,634 (but still at only 35% of 2007 levels). Most recently, in 2014, the number of recorded lots fell slightly from 2013 levels to 1,486.
- New lots in formal plat subdivisions recorded outside the UGAs averaged 8% of the countywide total since 1995. During both 2013 and 2014, however, the number of lots recorded outside the UGAs dropped to just 4% of the countywide total.
- Since 2007, rural cluster subdivision activity has dropped off significantly, with no signs of a post-recession rebound in rural cluster subdivision applications.
- Recorded lots in rural cluster subdivisions have increased slightly starting in 2012, with an average of 74 lots created annually from 2012-2014, up from only 23 lots recorded in each year of the 2010-2011 period.
- The rate of rural cluster recordings will be closely monitored over the next 2 years as the pipeline of nearly 2,500 preliminarily approved or proposed lots in rural cluster subdivisions, mainly from the mid-2000s, approaches expiration.
- Following a 2005 peak of nearly 7,000 residential units permitted countywide, the number of permitted units dropped each year to a low of just under 2,300 units in 2010.

Annual permit volumes have increased since then, totaling over 4,100 units countywide in 2013, and nearly 3,500 in 2014.

- Countywide residential permit increases since 2010 have been driven solely by an increase in multi-family permits. The volume of multi-family units permitted countywide reached a 13-year high in 2013 with 2,112 units permitted. Most recently, the number of multi-family units permitted fell by 37% in 2014 to 1,331 new units.
- Since falling in 2008 to record-low levels, single-family permit activity countywide has stayed remarkably stable, averaging around 2,000 units per year for the entire 2008-2014 period.
- The share of countywide housing units permitted in rural areas has declined significantly over the past two decades, with rural shares dropping from between 20-33% in the early 1990s, to the lowest rural shares (10% or below) of the past 25 years occurring during the most recent 4-year period (2011-2014).

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Introduction

Snohomish County Countywide Planning Policies (CPPs), at GF-5 and Appendix C (Long Term Monitoring), require that the cities and the county develop and implement a coordinated growth monitoring program through Snohomish County Tomorrow (SCT). Annual results of the growth monitoring program are to be published in a growth monitoring report to be reviewed by the Snohomish County Tomorrow Steering Committee. This report is prepared to satisfy that requirement for 2015. The report assesses the most recent growth and development trend information available for Snohomish County. Updated information on estimated population and employment in urban growth areas, cities, and the rural area is compared with information on remaining projected growth. Information on annexations and residential development trends is also provided.

The 2015 Growth Monitoring Report (GMR) was accepted by the SCT Planning Advisory Committee (PAC) on November 12, 2015 for SCT Steering Committee review and discussion scheduled for December 2, 2015.

The main purpose of the Growth Monitoring Report is to provide growth-related information as part of the annual growth monitoring data collection responsibilities agreed to by cities and the county in CPP GF-5. The report does not contain policy recommendations that would currently warrant action by the SCT Steering Committee. However, the empirical data contained in this report may lead to future land use policy discussions that could result in changes to local comprehensive plans or CPP growth targets.

The residential development trends section of the report describes rural cluster subdivision activity trends as required by the county's General Policy Plan (GPP) LU 6.B.8 which reads:

Monitor the rate and pattern of development created by rural cluster subdivisions and report to the county council annually to ensure that a pattern of urban development is not established in rural areas.

This monitoring policy was added to the GPP as part of the county's response to the Growth Management Hearings Board's 1996 remand on rural plan densities and zoning. The county adopted a number of comprehensive plan designation and zoning changes within the rural area that went into effect December 12, 1996. Amendments to the county's Rural Cluster Subdivision (RCS) ordinance also went into effect that day. Consequently, the monitoring of RCS activity in this report focuses primarily on rural cluster subdivisions submitted after December 12, 1996.

For additional information on the Growth Monitoring Report, please contact Snohomish County Planning & Development Services, 425-388-3311, ext. 2361.

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