



King County

Shannon Braddock

King County Executive

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October 14, 2025

The Honorable Girmay Zahilay
Chair, King County Council
Room 1200
C O U R T H O U S E

Dear Councilmember Zahilay:

This letter transmits the 2025 King County Housing Needs Assessment (HNA), in response to Ordinance 19861, Section 108, Expenditure Restriction ER9. Consistent with the requirements of the expenditure restriction, the King County Department of Community and Human Services (DCHS) contracted with Grow America to conduct a third-party countywide housing needs assessment. Grow America and its subcontractor, ECONorthwest, created an expansive report that addresses the legislative direction and offers a third-party and data-driven perspective on King County's housing needs and what it would take to meet them.

The consultants' report assembles a countywide, subregional, and jurisdictional-level view of population, workforce, and housing characteristics; housing supply and market trends; housing affordability for rental and home ownership; funding tools and levels; the gap between the housing inventory and needs of residents, and the estimated cost to close that gap. The HNA provides information that updates and builds on past and existing efforts to identify and address local housing needs, including the 2018 Regional Affordable Housing Task Force report and Five Year Action Plan, the 2021 Countywide Planning Policies (CPP) Housing Chapter, the 2024 King County Comprehensive Plan Housing Needs Assessment, and the 2025 Analysis of Impediments to Fair Housing Choice.

The HNA from Grow America and ECONorthwest orients researchers, planners, and policymakers to key issues and dynamics in local housing policies and investments. The consultants analyzed the most recent available data to highlight how the county's housing stock meets the needs of its diverse communities and where there are gaps or mismatches. Key findings include:

- gradual progress towards meeting countywide permanent housing needs identified in the CPP Housing Chapter since 2019, constrained by the limited availability and complexity of funding for deeply affordable housing;
- persistent rates of cost burden among low-income and renter households, despite consistent production of income-restricted units since 2019;
- mismatches between the location of jobs, transportation, and affordable units, particularly for low-wage workers;
- structural gaps in the size and affordability of the current housing inventory, with a particular shortage of units that are both affordable to households below 50 percent of area median income and that have three or more bedrooms, and
- a \$3.96 billion annual gap in funding for capital, operating, and supportive service subsidies to meet CPP countywide affordable housing needs by 2044, even after accounting for recent income-restricted housing production and current federal, state, local, and philanthropic investments.

The HNA integrates community voices from recent community engagement efforts conducted by King County between 2021 and 2025. The HNA reflects and builds on findings from the 2025 King County Analysis of Impediments to Fair Housing Choice, the draft 2025 King County Consortium Consolidated Plan, the 2024 King County Comprehensive Plan, the 2023 and 2024 Equitable Development Initiative Phase 1 and 2 Implementation Plans, and the 2021 Skyway-West Hill/North Highline Anti-displacement report. To support Grow America and ECONorthwest in scoping the study and ensuring it complemented other local efforts, DCHS staff engaged with the City of Seattle's Office of Planning and Community Development and Office of Housing, A Regional Coalition for Housing (ARCH), South King Housing and Homelessness Partners (SKHHP), and the Housing Development Consortium.

Thank you for your consideration of this report. The important work discussed in the 2025 King County Countywide Housing Needs Assessment can help to inform future policy and investments to meet the county's diverse housing needs.

If your staff have any questions, please contact Kelly Rider, Director, Department of Community and Human Services, at 206-263-5780.

Sincerely,



for

Shannon Braddock
King County Executive

The Honorable Girmay Zahilay

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Enclosure

cc: King County Councilmembers

ATTN: Stephanie Cirkovich, Chief of Staff, King County Council

Melani Hay, Clerk of the Council

Karan Gill, Deputy Executive, Chief of Staff, Office of the Executive

Stephanie Pure, Council Relations Director, Office of the Executive

Kelly Rider, Director, Department of Community and Human Services