

HOUSING NEEDS AND HOUSING PRODUCTION

A PROGRESS REPORT TO THE
WASHINGTON STATE LEGISLATURE

Steven C. Bourassa

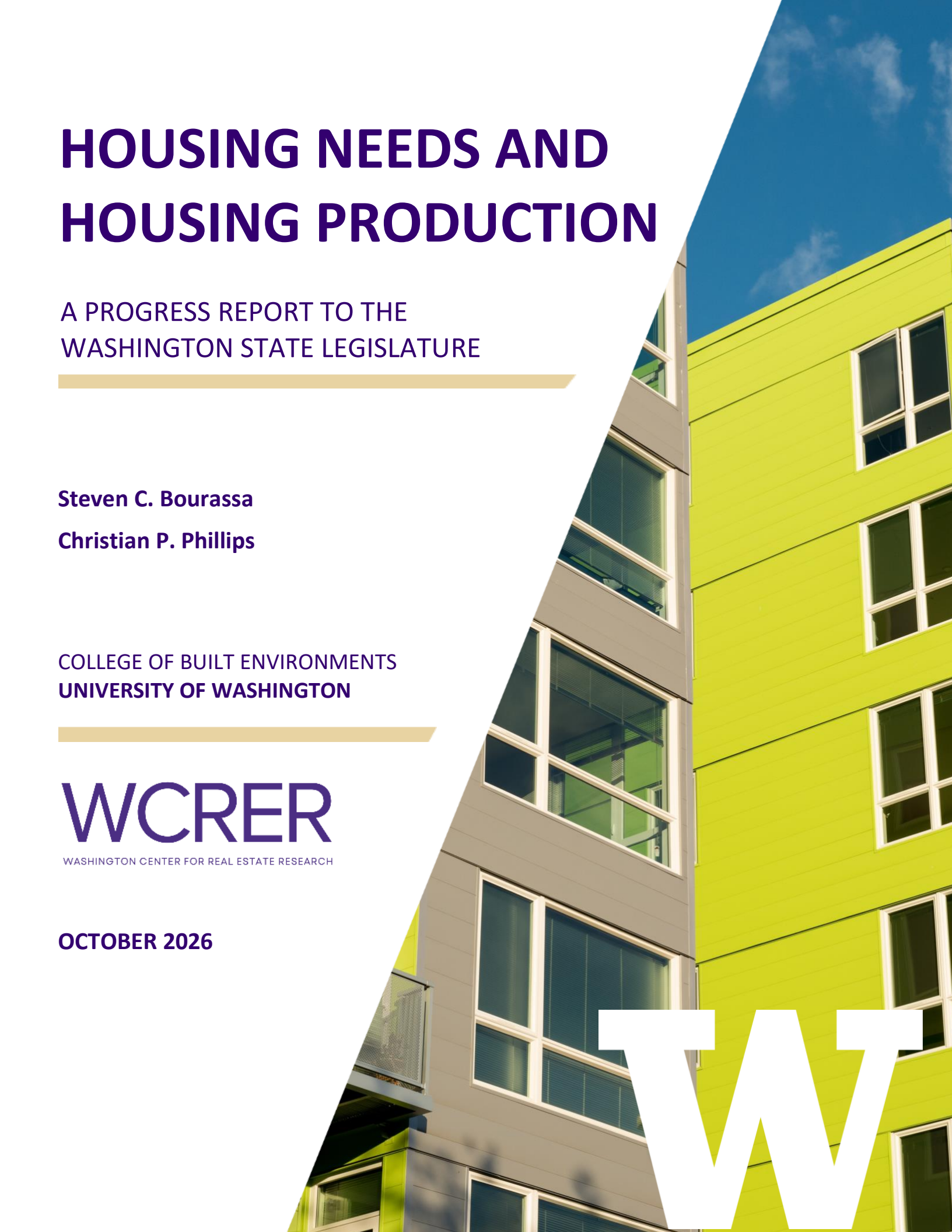
Christian P. Phillips

COLLEGE OF BUILT ENVIRONMENTS
UNIVERSITY OF WASHINGTON

WCRER

WASHINGTON CENTER FOR REAL ESTATE RESEARCH

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Executive Summary

This report provides an analysis of the production of housing relative to projected needs in the state of Washington. It considers permanent housing affordable to households at various income levels, as well as housing intended to serve the homeless. Permanent housing is analyzed for the period from the baseline year 2020 through 2022, which is the most recent year for which the relevant data are available. Emergency housing for the homeless and permanent supportive housing (PSH) are analyzed for the period from 2020 through 2025. This report is required by SSB 5587, which was enacted in 2025 and codified as RCW 36.70A.610, paragraph (1)(e).

The main findings with respect to permanent housing are as follows:

- **The bulk of new housing produced during the 2020-2022 period was in the upper income category, >120% of area median income (AMI).** This is partly explained by the fact that most new housing is affordable only to upper-income groups. Also, as the number of additional housing units in the >120% AMI category greatly exceeds the total number of units produced, most of those units must have resulted from upward filtering (i.e., shifting from one affordability category to another) of housing that was previously less expensive.
- **Some mostly rural counties produced enough housing units to more than cover projected needs for extremely and very low-income households (0-30% and >30-50% AMI, respectively).** This is probably mainly the result of downward filtering due to the small numbers of subsidized housing units produced during the period. Statistical sampling issues may also be a factor due to the small numbers involved.
- **Two Puget Sound counties—King and Snohomish—experienced significant increases in the >50-80% AMI category.** This was probably due mainly to upward filtering at a time when the apartment rental markets were very tight in those counties. Production of new subsidized housing affordable to households in that income category probably also played a role.
- **Cumulative numbers show deficits for all counties or county groups for the aggregated 0-100% and 0-120% AMI ranges.** Only two counties—Columbia and King—show positive numbers for the 0-80% AMI range. These findings reflect the fact that most new housing production is in the >120% AMI category.
- **Overall, counties produced more than enough housing to cover their total two-year projected needs.** Total projected needs were 90,240, and total net production was 100,422, or about 11% more than the projected needs.
- **Several counties and one county group did not produce enough housing to cover their total two-year projected needs.** The counties were Kitsap, Pierce,

Snohomish, Thurston, and Yakima, while the county group included Benton, Franklin, and Walla Walla.

The main findings with respect to emergency housing and PSH are as follows:

- **Statewide, net production of emergency housing during 2020-2025 represented only 17.4% of projected needs, while the net production of PSH represented only 9.5% of projected needs.** These numbers reflect some combination of insufficient funding and administrative challenges in producing housing for the homeless.
- **All counties but one had a deficit in the production of PSH, while most counties had a deficit in production of emergency housing.** The one county that did not have a deficit in production of PSH had no projected need for PSH. Some 16 mostly rural counties met or exceeded needs for emergency housing. Of those, one county had no projected need for emergency housing. The most populous counties—King, Pierce, and Snohomish—had relatively large deficits in production of both PSH and emergency housing.

Introduction

This report provides an analysis of the production of housing relative to projected needs in the state of Washington. It considers permanent housing affordable to households at various income levels, as well as housing intended to serve the homeless. This report is required by Substitute Senate Bill 5587 (SSB 5587), which was passed into law in 2025. This legislation amended RCW 36.70A.610, adding paragraph (1)(e). That paragraph requires the Washington Center for Real Estate Research (WCRER) to report the following to the Washington legislature by October 15, 2026, and every two years thereafter:

(i)(A) Except as provided in (e)(i)(B) of this subsection, an analysis of the estimated existing housing units and existing housing needs within each county at the following income levels: 0 to 30 percent of the area median income, 30 to 50 percent of the area median income, 50 to 80 percent of the area median income, 80 to 100 percent of the area median income, 100 to 120 percent of the area median income, and greater than 120 percent of the area median income;

(B) If a county's estimated existing housing units, existing housing needs, or both, cannot be determined at the income levels under (e)(i)(A) of this subsection or at the individual county level due to insufficient data, alternative thresholds may be used to best determine existing housing units and existing housing needs;

(ii) Each county's progress in closing the gap between estimated existing housing units within the county and existing housing needs; and

(iii) Each county's progress in meeting emergency housing, emergency shelters, and permanent supportive housing needs within the county.

The detailed methodology for measuring progress as specified above is discussed in two separate reports dealing with (a) permanent housing and (b) emergency housing and permanent supportive housing (PSH) (Bourassa and Phillips, 2026b and 2026a, respectively).

Under the Growth Management Act, fully planning counties are required to adopt, in cooperation with their cities, countywide planning policies that consider the need for affordable housing (RCW 36.70A.210(2) and (3)(e)). In 2021, House Bill 1220 amended the Growth Management Act to require these jurisdictions to “plan for and accommodate housing affordable to all economic segments of the population of the state” (RCW 36.70A.020(4)). The bill also updated the housing element requirements in RCW 36.70A.070(2). Under these provisions, comprehensive plans must include an inventory and analysis of existing and projected housing needs, as provided by the Washington State

Department of Commerce, for moderate-, low-, very low-, and extremely low-income households, as well as emergency housing, emergency shelters, and PSH.

To assist counties with the affordable housing planning process, the Department of Commerce has developed the Housing for All Planning Tool (HAPT) that allows counties to project needs for permanent housing at different income levels and emergency housing and PSH based on a range of assumptions.¹ Working together, jurisdictions within each county use HAPT to identify the countywide existing and projected housing needs as required under RCW 36.70A.070(2), allocate those needs to each jurisdiction, and incorporate them into their comprehensive plan periodic updates (Figure 1).



Figure 1: Comprehensive Plan Update Schedule, Washington Counties

Source: Department of Commerce

Note: Cross hatching denotes partially planning counties under the GMA.

The HAPT presents permanent housing needs, including PSH needs, in terms of housing *units*, while emergency housing and emergency shelter needs are presented in terms of

¹ The Department of Commerce has also published guidance, such as Fritzel and Hodgson (2023).

beds. Comprehensive plans completed in a given year anticipate needs 20 years into the future. For example, plans completed in 2024 anticipate needs through 2044. The new reporting requirement established by SSB 5587 reflects the Legislature’s intent to monitor counties’ progress in addressing housing needs across income levels during the planning period.

The balance of this report presents baseline numbers and projected needs and compares those needs to net housing production. The report discusses permanent housing first, followed by emergency housing and PSH. The analysis of permanent housing is for the period 2020 to 2022, as 2020 is the baseline year in HAPT and 2022 is the most recent year for which data are available.² The analysis of emergency housing and PSH is for the period 2020 to 2025. We also provide estimates of PSH for the period 2020 to 2022, which allows the 0-30% AMI permanent housing category to be apportioned into PSH and non-PSH units.

² The main constraint is the U.S. Department of Housing and Urban Development’s Comprehensive Housing Affordability Strategy (CHAS) data. The most recent CHAS data is for 2022, which was published by HUD in December 2025.

Baseline Numbers and Projected Needs for Permanent Housing

The baseline estimates of the distribution of housing affordability by county were created in part using 2018 Comprehensive Housing Affordability Strategy (CHAS) data. The CHAS data are released by the U.S. Department of Housing and Urban Development (HUD) several years after the year to which they pertain.³ The 2018 CHAS data are based on the 2014-2018 five-year American Community Survey (ACS). Unlike the publicly available ACS Public Use Microdata Sample (PUMS) data, the CHAS statistics are based on the complete ACS results and are reported at a more disaggregated level of geographic detail.⁴ Specifically, CHAS data are available for each county in the state, while the PUMS data are organized into Public Use Microdata Areas (PUMAs) that combine smaller counties into groups (see the Appendix).

The CHAS data provide affordability details for only some of the income categories of interest:

- Owner affordability: 0-50%, >50-80%, >80-100%, and >100% of AMI
- Rental affordability: 0-30%, >30-50%, >50-80%, and >80% of AMI

To allocate owner-occupied units between the 0-30% and >30-50% AMI categories, it was assumed that no units were affordable to the lower-income category. This meant that all owner-occupied units listed by CHAS as affordable to the 0-50% AMI category were assigned to the >30-50% category. Because the CHAS data do not provide a detailed breakdown of rental affordability above 80% of AMI or of owner affordability above 100% of AMI, PUMS data were used to allocate units above those levels.

To update the 2018 CHAS numbers to 2020, they were weighted using 2020 Washington State Office of Financial Management (OFM) housing stock numbers, adjusted to exclude seasonal and migrant worker housing.⁵ This means that the sum of the housing units across all the affordability categories is consistent with the adjusted total in the OFM data for each county. Data from the 2020 PUMS (based on the five-year ACS data for 2016 to 2020) were used to allocate housing units to the upper AMI categories not delineated in the CHAS data. The allocations were distributed across the counties that were grouped within a single PUMA, on the basis of county populations.⁶

³ The CHAS data are available at <https://www.huduser.gov/portal/datasets/cp.html>.

⁴ The PUMS data are available at <https://www.census.gov/programs-surveys/acs/microdata/access.html>.

⁵ The OFM data are available at <https://ofm.wa.gov/data-research/population-demographics/estimates/april-1-official/>. The seasonal and migrant worker housing numbers are from the relevant five-year ACS, available at <https://data.census.gov>.

⁶ The methods used to allocate housing units to affordability categories are described in Bourassa and Phillips (2026b), available at: <https://wcrer.be.uw.edu/research-reports/>.

The sources of data for assessing progress in meeting projected needs are summarized in Figure 2. To recap, the CHAS data produced by HUD are used to allocate owner-occupied housing units to the >30-50%, >50-80%, and >80-100% AMI categories and to allocate rental units to the 0-30%, >30-50%, and >50-80% AMI categories. The >100% AMI categories for owner-occupied housing and >80% AMI categories for rental categories are allocated based on the proportions in those categories in the relevant five-year PUMS data. The numbers are scaled so that the totals for each county equal the OFM housing stock numbers adjusted for seasonal and migrant worker housing.

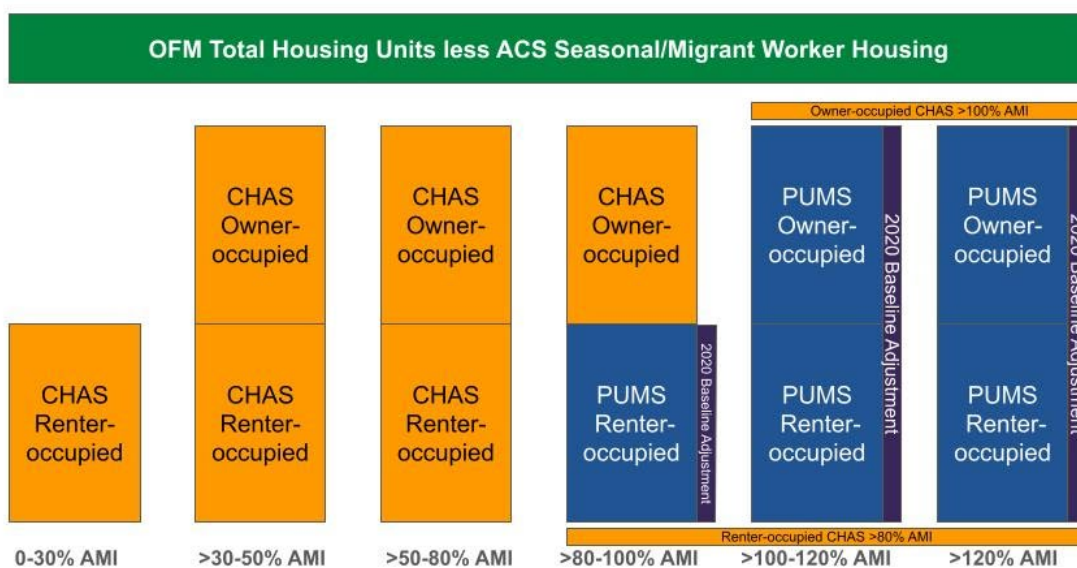


Figure 2. Sources of Data for Assessing Progress in Affordable Housing Supply

Note: Owner-occupied units that are nominally affordable at the 0-30% AMI category are assigned to the >30-50% category.

Tables 1a and 1b provide the HAPT baseline numbers for the different affordability categories. Table 1a is based entirely on the 2018 CHAS data updated to 2020 using OFM housing stock numbers for the latter year. Table 1b adds details for the >80% AMI categories based on the 2020 five-year PUMS data. We report the data in Table 1b by county group whenever the relevant PUMA is defined in terms of a group of counties. As noted above, for the purposes of HAPT, the grouped data were allocated to counties using county populations as weights. We chose not to do that here as we think population-weighting is unlikely to give accurate results.

Tables 2a and 2b provide our recalculations of the 2020 baseline numbers. The numbers we calculated from the CHAS data in Table 2a are the same as those in Table 1a; however, the numbers based on analysis of PUMS data in Table 2b differ from those in Table 1b.⁷ The differences between Tables 1b and 2b are reported in Table 3. For the sake of consistency with the HAPT baseline numbers in Table 1b, we adjust measures derived from the PUMS data for subsequent years by the numbers in Table 3.

Table 4 provides annualized projected needs by level of affordability. These numbers are based on population projections selected by the counties where available, or else on OFM's medium population projections, and the projections of housing needs that result from these populations entered in the HAPT. These numbers are subject to change if more counties adopt population projections other than the OFM mediums.

⁷ We were unable to account for these differences.

Table 1a. HAPT Baseline Housing Units by Affordability Level for Counties, 2020

	0-30% AMI	>30-50% AMI	>50-80% AMI	>80% AMI	Total	
Adams	565	1,816	2,436	1,837	6,654	Adams
Asotin	290	2,188	3,238	4,134	9,850	Asotin
Benton	2,598	13,090	31,122	32,632	79,442	Benton
Chelan	1,800	3,272	6,970	18,888	30,930	Chelan
Clallam	1,570	5,244	8,816	20,118	35,748	Clallam
Clark	5,141	16,223	60,225	112,417	194,006	Clark
Columbia	122	513	646	691	1,972	Columbia
Cowlitz	1,522	7,443	14,761	21,247	44,973	Cowlitz
Douglas	978	2,237	3,916	8,975	16,106	Douglas
Ferry	269	950	681	1,183	3,083	Ferry
Franklin	1,144	7,754	11,145	9,564	29,607	Franklin
Garfield	69	472	386	230	1,157	Garfield
Grant	2,609	9,150	11,469	11,798	35,026	Grant
Grays Harbor	1,781	8,450	10,226	11,597	32,054	Grays Harbor
Island	1,228	2,915	7,479	25,650	37,272	Island
Jefferson	820	1,857	3,088	11,086	16,851	Jefferson
King	38,381	91,505	155,214	675,851	960,951	King
Kitsap	4,237	11,737	33,907	61,033	110,914	Kitsap
Kittitas	842	2,799	6,330	10,004	19,975	Kittitas
Klickitat	696	1,793	2,594	4,896	9,979	Klickitat
Lewis	1,521	6,017	10,732	14,932	33,202	Lewis
Lincoln	326	1,640	1,389	1,596	4,951	Lincoln
Mason	992	3,566	7,451	14,868	26,877	Mason
Okanogan	1,896	4,645	4,882	6,272	17,695	Okanogan
Pacific	701	2,433	3,106	4,305	10,545	Pacific
Pend Oreille	363	1,372	1,489	2,990	6,214	Pend Oreille
Pierce	10,127	36,738	112,533	196,401	355,799	Pierce
San Juan	429	589	1,248	6,375	8,641	San Juan
Skagit	1,999	5,329	13,558	32,075	52,961	Skagit
Skamania	348	1,002	1,296	2,403	5,049	Skamania
Snohomish	10,998	42,985	67,180	196,185	317,348	Snohomish
Spokane	7,550	34,798	91,803	87,689	221,840	Spokane
Stevens	1,097	4,592	5,088	8,795	19,572	Stevens
Thurston	3,059	12,428	38,356	66,492	120,335	Thurston
Wahkiakum	32	358	505	1,072	1,967	Wahkiakum
Walla Walla	682	4,373	8,037	11,488	24,580	Walla Walla
Whatcom	3,400	9,108	24,150	58,559	95,217	Whatcom
Whitman	1,340	6,120	7,256	6,097	20,813	Whitman
Yakima	4,579	20,264	33,325	31,257	89,425	Yakima
Statewide	118,101	389,765	808,033	1,793,682	3,109,581	Statewide

Source: Authors' calculations

Note: The county data shown are based on 2018 CHAS data scaled so that the countywide totals equal the corresponding 2020 OFM housing stock numbers adjusted for seasonal and migrant housing.

Table 1b. HAPT Baseline Housing Units by Affordability Level for County Groups, 2020

Adams, Asotin, Columbia, Garfield, Lincoln & Whitman	30,812	5,568	3,308	5,709	45,397	Adams, Asotin, Columbia, Garfield, Lincoln & Whitman
Benton, Franklin & Walla Walla	79,945	20,381	12,930	20,373	133,629	Benton, Franklin & Walla Walla
Chelan & Douglas	19,173	6,798	5,573	15,492	47,036	Chelan & Douglas
Clallam & Jefferson	21,395	6,274	5,032	19,898	52,599	Clallam & Jefferson
Cowlitz, Pacific & Wahkiakum	30,861	9,609	5,904	11,111	57,485	Cowlitz, Pacific & Wahkiakum
Ferry, Okanogan, Pend Oreille & Stevens	27,324	5,507	3,147	10,586	46,564	Ferry, Okanogan, Pend Oreille & Stevens
Grant & Kittitas	33,199	7,469	4,536	9,797	55,001	Grant & Kittitas
Grays Harbor & Mason	32,466	7,794	5,328	13,343	58,931	Grays Harbor & Mason
Island, San Juan & Skagit	34,774	14,715	11,135	38,250	98,874	Island, San Juan & Skagit
Klickitat, Lewis & Skamania	25,999	6,406	4,194	11,631	48,230	Klickitat, Lewis & Skamania
Clark	81,589	37,292	28,348	46,777	194,006	Clark
King	285,100	181,009	119,133	375,709	960,951	King
Kitsap	49,881	19,338	12,078	29,617	110,914	Kitsap
Pierce	159,398	72,435	46,088	77,878	355,799	Pierce
Snohomish	121,163	62,562	49,788	83,835	317,348	Snohomish
Spokane	134,151	32,035	20,981	34,673	221,840	Spokane
Thurston	53,843	26,452	15,518	24,522	120,335	Thurston
Whatcom	36,658	14,457	11,771	32,331	95,217	Whatcom
Yakima	58,168	10,917	7,070	13,270	89,425	Yakima
Statewide	1,315,899	547,018	371,862	874,802	3,109,581	Statewide
	0-80% AMI	>80-100% AMI	>100-120% AMI	>120% AMI	Total	

Source: Authors' calculations

Notes: Renter-occupied units are allocated to the >80-100%, >100-120%, and >120% AMI categories and owner-occupied units were allocated to the >100-120% and >120% AMI categories based on 2020 five-year PUMS data. Allocations to lower AMI categories were based on 2018 CHAS data. All numbers are scaled so that the countywide totals equal the corresponding 2020 OFM housing stock numbers adjusted for seasonal and migrant housing.

Table 2a. WCRER Baseline Housing Units by Affordability Level for Counties, 2020

	0-30% AMI	>30-50% AMI	>50-80% AMI	>80% AMI	Total	
Adams	565	1,816	2,436	1,837	6,654	Adams
Asotin	290	2,188	3,238	4,134	9,850	Asotin
Benton	2,598	13,090	31,122	32,632	79,442	Benton
Chelan	1,800	3,272	6,970	18,889	30,931	Chelan
Clallam	1,570	5,244	8,816	20,118	35,748	Clallam
Clark	5,141	16,223	60,225	112,416	194,005	Clark
Columbia	122	513	646	692	1,973	Columbia
Cowlitz	1,522	7,443	14,761	21,246	44,972	Cowlitz
Douglas	978	2,237	3,916	8,975	16,106	Douglas
Ferry	269	950	681	1,183	3,083	Ferry
Franklin	1,144	7,754	11,145	9,564	29,607	Franklin
Garfield	69	472	386	231	1,158	Garfield
Grant	2,609	9,150	11,469	11,798	35,026	Grant
Grays Harbor	1,781	8,450	10,226	11,597	32,054	Grays Harbor
Island	1,228	2,915	7,479	25,650	37,272	Island
Jefferson	820	1,857	3,088	11,086	16,851	Jefferson
King	38,381	91,505	155,214	675,851	960,951	King
Kitsap	4,237	11,737	33,907	61,033	110,914	Kitsap
Kittitas	842	2,799	6,330	10,004	19,975	Kittitas
Klickitat	696	1,793	2,594	4,896	9,979	Klickitat
Lewis	1,521	6,017	10,732	14,931	33,201	Lewis
Lincoln	326	1,640	1,389	1,595	4,950	Lincoln
Mason	992	3,566	7,451	14,868	26,877	Mason
Okanogan	1,896	4,645	4,882	6,273	17,696	Okanogan
Pacific	701	2,433	3,106	4,305	10,545	Pacific
Pend Oreille	363	1,372	1,489	2,991	6,215	Pend Oreille
Pierce	10,127	36,738	112,533	196,401	355,799	Pierce
San Juan	429	589	1,248	6,375	8,641	San Juan
Skagit	1,999	5,329	13,558	32,076	52,962	Skagit
Skamania	348	1,001	1,296	2,403	5,048	Skamania
Snohomish	10,998	42,985	67,180	196,185	317,348	Snohomish
Spokane	7,550	34,798	91,803	87,690	221,841	Spokane
Stevens	1,097	4,592	5,088	8,795	19,572	Stevens
Thurston	3,059	12,428	38,356	66,491	120,334	Thurston
Wahkiakum	32	358	505	1,071	1,966	Wahkiakum
Walla Walla	682	4,373	8,037	11,488	24,580	Walla Walla
Whatcom	3,400	9,108	24,150	58,559	95,217	Whatcom
Whitman	1,340	6,120	7,256	6,098	20,814	Whitman
Yakima	4,579	20,264	33,325	31,257	89,425	Yakima
Statewide	118,101	389,764	808,033	1,793,684	3,109,582	Statewide
	0-30% AMI	>30-50% AMI	>50-80% AMI	>80% AMI	Total	

Source: Authors' calculations

Note: Based on 2018 CHAS data scaled to OFM housing stock numbers adjusted for seasonal and migrant worker housing.

Table 2b. WCRER Baseline Housing Units by Affordability Level for Counties and County Groups, 2020

Adams, Asotin, Columbia, Garfield, Lincoln & Whitman	30,811	5,739	3,196	5,653	45,399	Adams, Asotin, Columbia, Garfield, Lincoln & Whitman
Benton, Franklin & Walla Walla	79,945	20,511	11,846	21,327	133,629	Benton, Franklin & Walla Walla
Chelan & Douglas	19,174	6,752	5,218	15,893	47,037	Chelan & Douglas
Clallam & Jefferson	21,395	6,556	5,737	18,911	52,599	Clallam & Jefferson
Cowlitz, Pacific & Wahkiakum	30,858	9,437	5,789	11,399	57,483	Cowlitz, Pacific & Wahkiakum
Ferry, Okanogan, Pend Oreille & Stevens	27,325	5,894	4,162	9,185	46,566	Ferry, Okanogan, Pend Oreille & Stevens
Grant & Kittitas	33,199	7,864	4,317	9,621	55,001	Grant & Kittitas
Grays Harbor & Mason	32,466	8,201	6,261	12,003	58,931	Grays Harbor & Mason
Island, San Juan & Skagit	34,775	14,975	10,491	38,634	98,875	Island, San Juan & Skagit
Klickitat, Lewis & Skamania	25,997	6,461	5,395	10,375	48,228	Klickitat, Lewis & Skamania
Clark	81,589	37,961	28,120	46,335	194,005	Clark
King	285,100	209,609	100,677	365,565	960,951	King
Kitsap	49,882	19,113	10,813	31,106	110,914	Kitsap
Pierce	159,399	75,518	42,887	77,995	355,799	Pierce
Snohomish	121,163	65,969	45,304	84,912	317,348	Snohomish
Spokane	134,152	32,532	20,369	34,788	221,841	Spokane
Thurston	53,842	26,347	14,122	26,023	120,334	Thurston
Whatcom	36,657	14,117	11,864	32,579	95,217	Whatcom
Yakima	58,167	12,285	6,326	12,647	89,425	Yakima
Statewide	1,315,896	585,841	342,894	864,951	3,109,582	Statewide
	0-80% AMI	>80-100% AMI	>100-120% AMI	>120% AMI	Total	

Source: Authors' calculations

Note: Based on 2018 CHAS and 2020 five-year PUMS data scaled to OFM housing stock numbers adjusted for seasonal and migrant worker housing.

Table 3. Differences Between HAPT and WCRER Baseline Estimates

Adams, Asotin, Columbia, Garfield, Lincoln & Whitman	-171	112	56	Adams, Asotin, Columbia, Garfield, Lincoln & Whitman
Benton, Franklin & Walla Walla	-130	1,084	-954	Benton, Franklin & Walla Walla
Chelan & Douglas	46	355	-401	Chelan & Douglas
Clallam & Jefferson	-282	-705	987	Clallam & Jefferson
Cowlitz, Pacific & Wahkiakum	172	115	-288	Cowlitz, Pacific & Wahkiakum
Ferry, Okanogan, Pend Oreille & Stevens	-387	-1,015	1,401	Ferry, Okanogan, Pend Oreille & Stevens
Grant & Kittitas	-395	219	176	Grant & Kittitas
Grays Harbor & Mason	-407	-933	1,340	Grays Harbor & Mason
Island, San Juan & Skagit	-260	644	-384	Island, San Juan & Skagit
Klickitat, Lewis & Skamania	-55	-1,201	1,256	Klickitat, Lewis & Skamania
Clark	-669	228	442	Clark
King	-28,600	18,456	10,144	King
Kitsap	225	1,265	-1,489	Kitsap
Pierce	-3,083	3,201	-117	Pierce
Snohomish	-3,407	4,484	-1,077	Snohomish
Spokane	-497	612	-115	Spokane
Thurston	105	1,396	-1,501	Thurston
Whatcom	340	-93	-248	Whatcom
Yakima	-1,368	744	623	Yakima
Statewide	-38,823	28,968	9,851	Statewide
	>80-100% AMI	>100-120% AMI	>120% AMI	

Source: Authors' calculations

Note: These are the differences resulting from analysis of PUMS data. There are no differences in the CHAS data used for the <80% AMI categories.

Table 4. Annualized Projected Needs by Affordability Level, Counties and County Groups

Adams	19	8	14					Adams
Asotin	18	19	6					Asotin
Columbia	3	1	0					Columbia
Garfield	3	1	0					Garfield
Lincoln	5	3	0					Lincoln
Whitman	137	12	0					Whitman
Benton	264	255	180					Benton
Franklin	143	98	153					Franklin
Walla Walla	79	36	11					Walla Walla
Chelan	84	68	68					Chelan
Douglas	41	39	56					Douglas
Clallam	97	61	29					Clallam
Jefferson	75	23	19					Jefferson
Cowlitz	170	101	36					Cowlitz
Pacific	43	5	2					Pacific
Wahkiakum	5	2	2					Wahkiakum
Ferry	7	1	0					Ferry
Okanogan	55	16	7					Okanogan
Pend Oreille	13	6	6					Pend Oreille
Stevens	70	19	26					Stevens
Grant	107	102	127					Grant
Kittitas	96	41	16					Kittitas
Grays Harbor	121	49	2					Grays Harbor
Mason	83	61	41					Mason
Island	64	62	51					Island
San Juan	25	20	17					San Juan
Skagit	179	115	100					Skagit
Klickitat	30	20	14					Klickitat
Lewis	110	48	29					Lewis
Skamania	27	7	8					Skamania
Clark	814	671	663					Clark
King	5,180	2,004	927					King
Kitsap	377	225	189					Kitsap
Pierce	1,411	862	681					Pierce
Snohomish	1,839	977	714					Snohomish
Spokane	986	524	340					Spokane
Thurston	494	337	331					Thurston
Whatcom	476	288	116					Whatcom
Yakima	314	211	116					Yakima
Statewide	14,064	7,398	5,097					Statewide
	0-30% AMI	>30-50% AMI	>50-80% AMI	>80-100% AMI	>100-120% AMI	>120% AMI	Total	

Source: Authors' calculations

Note: The projected needs for most counties are the numbers adopted by those counties, while Asotin, Columbia, Cowlitz, Ferry, Garfield, Grant, Grays Harbor, Klickitat, Lincoln, Okanogan, Pend Oreille, Skamania, Stevens, Wahkiakum, and Whitman counties are based on OFM's medium population projection. Spokane County is pending final adoption. The numbers for groups of counties in the upper right part of the table represent the totals for those groups.

Permanent Housing Needs and Net Production for 2020-2022

Changes in the housing stock within AMI categories can result from one or more of the following:

- *Production of new housing that is affordable to households within an AMI category:* New market-rate housing is typically affordable only to households in moderate- or upper-income categories (80% of AMI and above). New housing that is affordable to lower-income households typically requires subsidies.
- *Loss of housing stock due to a hazard or demolition:* Hazards, such as fire, cause the loss of small numbers of housing units. Demolition due to obsolescence, deterioration, or replacement by a different land use also results in the loss of stock, although replacement uses may add to the stock.
- *Downward filtering from a higher AMI category:* Filtering refers to the downward or upward movement of housing units from one affordability category to another. Downward movements generally occur as properties age and become less expensive relative to other properties.
- *Upward filtering from a lower AMI category:* Upward filtering tends to occur in markets with some combination of strong demand and supply constraints. One type of upward filtering is gentrification, where wealthier households move into a lower-income neighborhood and drive up housing costs.
- *Changes in subsidy status:* Housing units that were previously unsubsidized may become subsidized, shifting their affordability to a lower AMI category, or vice versa. For example, a Low Income Housing Tax Credit agreement may expire, ending rent restrictions on units that benefitted from the tax credit.
- *Statistical error:* The CHAS and PUMS data used for the analysis presented here come from the U.S. Census Bureau's American Community Survey, which samples only a small percentage of all households. This means that there are margins of error in the statistics reported by the ACS. These margins of error are greater in percentage terms for smaller populations, such as for extremely low-income households in a small county.

The most recent CHAS data are based on the 2018-2022 five-year ACS. This means that the most recent year we can analyze at this point is 2022. Comparing the 2020 baseline numbers with data for 2022 requires some caution as there are overlapping years in the

CHAS and PUMS data. The overlapping years introduce some smoothing into the data, meaning that underlying trends will be less evident or pronounced.⁸

Table 5 gives projected needs for the two-year period from 2020 to 2022. These are the annual projected needs from Table 4 multiplied by two. Table 6 shows net production of housing during the 2020-2022 period. Focusing on the bottom line, which reports statewide numbers, the bulk of new production was in the >120% AMI category (282,320 units). As the total production for the two-year period was only 100,422 units, most of the growth in the >120% AMI category must have come from upward filtering from lower AMI categories. In particular, the >80-100% AMI category had a net loss of 95,063 units.

Table 7 compares the housing stock in 2022 with the 2020 HAPT baseline numbers, adjusting for the differences between the HAPT and WCRER baseline estimates shown in Table 3.⁹ As the right-hand (Total) column in Table 7 shows, most counties or county groups produced larger total numbers of housing units than required by projected needs. However, the only affordability level where the numbers consistently met or exceeded projected needs was the >120% AMI (upper income) category. In fact, net production in that AMI category exceeded requirements by 257,360 units. Statewide, production fell behind needs in each of the other affordability categories during the two-year period.

Some, mostly rural, counties show positive numbers for the 0-30% and >30-50% AMI categories, but most of those counties produced little or no subsidized housing during the two-year period.¹⁰ This means that the positive numbers were likely due to some combination of downward filtering and statistical sampling issues. Other notable findings from Table 7 are the positive numbers for King and Snohomish counties for the >50-80% AMI category. In both of those cases, the numbers probably result from a combination of upward filtering during a time when the apartment market was very tight and addition of new subsidized units affordable to households within that category.

Table 8 cumulates the numbers across affordability categories. Notably, every county or county group experienced net deficits in the aggregated 0-100% AMI and 0-120% AMI ranges. Only two counties show positive numbers for the 0-80% AMI range. These findings reflect the fact that most new housing production is in the >120% AMI category.

⁸ This also means that standard statistical tests (such as *t* tests) cannot be used to compare data for the two years due to lack of independence.

⁹ A detailed example of the calculations performed to produce the numbers in Table 5 is given in Bourassa and Phillips (2026b), Appendix B.

¹⁰ This observation is based on preliminary estimates from WCRER's Subsidized Rental Housing Inventory database.

Table 5. Projected Needs for Additional Housing, 2020-2022

Adams	38	16	28					Adams
Asotin	36	38	12					Asotin
Columbia	6	2	0	16	12	62	586	Columbia
Garfield	6	2	0					Garfield
Lincoln	10	6	0					Lincoln
Whitman	274	24	0					Whitman
Benton	528	510	360	400	416	1,708	4,958	Benton
Franklin	286	196	306					Franklin
Walla Walla	158	72	22					Walla Walla
Chelan	168	136	136	126	130	526	1,494	Chelan
Douglas	82	78	112					Douglas
Clallam	194	122	58	34	34	130	808	Clallam
Jefferson	150	46	38					Jefferson
Cowlitz	340	202	72	36	38	158	962	Cowlitz
Pacific	86	10	4					Pacific
Wahkiakum	10	4	4					Wahkiakum
Ferry	14	2	0					Ferry
Okanogan	110	32	14	38	32	144	666	Okanogan
Pend Oreille	26	12	12					Pend Oreille
Stevens	140	38	52					Stevens
Grant	214	204	254	144	140	606	1,864	Grant
Kittitas	192	82	32					Kittitas
Grays Harbor	242	98	4	38	46	194	994	Grays Harbor
Mason	166	122	82					Mason
Island	128	124	102					Island
San Juan	50	40	34	172	158	626	2,224	San Juan
Skagit	358	230	200					Skagit
Klickitat	60	40	28					Klickitat
Lewis	220	96	58	44	42	162	834	Lewis
Skamania	54	14	16					Skamania
Clark	1,628	1,342	1,326	660	764	2,576	8,296	Clark
King	10,360	4,008	1,854	1,234	1,400	6,764	25,620	King
Kitsap	754	450	378	194	192	778	2,746	Kitsap
Pierce	2,822	1,724	1,362	586	532	2,266	9,292	Pierce
Snohomish	3,678	1,954	1,428	1,164	1,366	4,364	13,954	Snohomish
Spokane	1,972	1,048	680	368	302	1,414	5,784	Spokane
Thurston	988	674	662	350	350	1,324	4,348	Thurston
Whatcom	952	576	232	160	216	744	2,882	Whatcom
Yakima	628	422	232	138	94	414	1,928	Yakima
Statewide	28,128	14,796	10,194	5,902	6,264	24,960	90,240	Statewide
	0-30% AMI	>30-50% AMI	>50-80% AMI	>80-100% AMI	>100-120% AMI	>120% AMI	Total	

Sources: HAPT and authors' calculations

Note: The projected needs for most counties are the numbers adopted by those counties, while Asotin, Columbia, Cowlitz, Ferry, Garfield, Grant, Grays Harbor, Klickitat, Lincoln, Okanogan, Pend Oreille, Skamania, Stevens, Wahkiakum, and Whitman counties are based on OFM's medium population projection. Spokane County is pending final adoption.

Table 6. Net Production of Housing, 2020-2022

Adams	-65	499	-561					Adams
Asotin	76	-204	-439					Asotin
Columbia	-8	36	-6	-263	-99	3,083	1,494	Columbia
Garfield	38	-8	-75					Garfield
Lincoln	122	-242	-89					Lincoln
Whitman	-295	-11	5					Whitman
Benton	400	-1,903	-5,691	628	2,249	13,887	4,739	Benton
Franklin	126	-1,524	-2,516					Franklin
Walla Walla	717	-414	-1,220					Walla Walla
Chelan	813	475	-1,180	-454	-495	3,532	2,497	Chelan
Douglas	134	-229	-99					Douglas
Clallam	48	-219	-1,744	-585	-483	5,429	1,439	Clallam
Jefferson	31	-575	-463					Jefferson
Cowlitz	118	-1,291	-2,370					Cowlitz
Pacific	-188	145	-401	-1,206	758	6,711	2,152	Pacific
Wahkiakum	11	12	-147					Wahkiakum
Ferry	75	32	-129					Ferry
Okanogan	163	208	-258	-783	-35	4,035	2,263	Okanogan
Pend Oreille	284	-164	-248					Pend Oreille
Stevens	167	-420	-664					Stevens
Grant	-155	995	-894	-1,195	712	4,461	3,106	Grant
Kittitas	281	-226	-873					Kittitas
Grays Harbor	362	-1,509	-504	-1,585	-84	6,367	1,584	Grays Harbor
Mason	298	519	-2,280					Mason
Island	-205	-395	-720					Island
San Juan	-9	144	-100	-3,605	-870	12,733	2,632	San Juan
Skagit	11	-452	-3,900					Skagit
Klickitat	89	-14	-480					Klickitat
Lewis	528	-718	-2,183	-1,163	177	5,810	1,476	Lewis
Skamania	-34	-77	-459					Skamania
Clark	1,142	2,910	-5,655	-3,170	1,590	11,976	8,793	Clark
King	-93	-15,229	32,451	-42,175	-2,755	60,400	32,599	King
Kitsap	-323	-1,781	-8,596	-1,364	2,720	11,133	1,789	Kitsap
Pierce	-97	-5,317	-16,894	-11,046	1,356	40,983	8,985	Pierce
Snohomish	322	-9,380	3,918	-20,995	-3,382	39,962	10,445	Snohomish
Spokane	1,683	-2,313	-20,355	1,811	3,622	22,002	6,450	Spokane
Thurston	452	430	-9,055	-2,961	1,311	13,040	3,217	Thurston
Whatcom	-119	51	-1,276	-2,551	-4,067	11,085	3,123	Whatcom
Yakima	824	776	-3,899	-2,401	648	5,691	1,639	Yakima
Statewide	7,724	-37,383	-60,049	-95,063	2,873	282,320	100,422	Statewide
	0-30% AMI	>30-50% AMI	>50-80% AMI	>80-100% AMI	>100-120% AMI	>120% AMI	Total	

Source: Authors' calculations

Table 7. Additional Housing Production Less Projected Needs, 2020-2022

	0-30% AMI	>30-50% AMI	>50-80% AMI	>80-100% AMI	>100-120% AMI	>120% AMI	Total	
Adams	-103	483	-589					Adams
Asotin	40	-242	-451					Asotin
Columbia	-14	34	-6	-279	-111	3,021	908	Columbia
Garfield	32	-10	-75					Garfield
Lincoln	112	-248	-89					Lincoln
Whitman	-569	-35	5					Whitman
Benton	-128	-2,413	-6,051					Benton
Franklin	-160	-1,720	-2,822	228	1,833	12,179	-219	Franklin
Walla Walla	559	-486	-1,242					Walla Walla
Chelan	645	339	-1,316	-580	-625	3,006	1,003	Chelan
Douglas	52	-307	-211					Douglas
Cllallam	-146	-341	-1,802	-619	-517	5,299	631	Cllallam
Jefferson	-119	-621	-501					Jefferson
Cowlitz	-222	-1,493	-2,442					Cowlitz
Pacific	-274	135	-405	-1,242	720	6,553	1,190	Pacific
Wahkiakum	1	8	-151					Wahkiakum
Ferry	61	30	-129					Ferry
Okanogan	53	176	-272					Okanogan
Pend Oreille	258	-176	-260	-821	-67	3,891	1,597	Pend Oreille
Stevens	27	-458	-716					Stevens
Grant	-369	791	-1,148	-1,339	572	3,855	1,242	Grant
Kittitas	89	-308	-905					Kittitas
Grays Harbor	120	-1,607	-508	-1,623	-130	6,173	590	Grays Harbor
Mason	132	397	-2,362					Mason
Island	-333	-519	-822					Island
San Juan	-59	104	-134	-3,777	-1,028	12,107	408	San Juan
Skagit	-347	-682	-4,100					Skagit
Klickitat	29	-54	-508					Klickitat
Lewis	308	-814	-2,241	-1,207	135	5,648	642	Lewis
Skamania	-88	-91	-475					Skamania
Clark	-486	1,568	-6,981	-3,830	826	9,400	497	Clark
King	-10,453	-19,237	30,597	-43,409	-4,155	53,636	6,979	King
Kitsap	-1,077	-2,231	-8,974	-1,558	2,528	10,355	-957	Kitsap
Pierce	-2,919	-7,041	-18,256	-11,632	824	38,717	-307	Pierce
Snohomish	-3,356	-11,334	2,490	-22,159	-4,748	35,598	-3,509	Snohomish
Spokane	-289	-3,361	-21,035	1,443	3,320	20,588	666	Spokane
Thurston	-536	-244	-9,717	-3,311	961	11,716	-1,131	Thurston
Whatcom	-1,071	-525	-1,508	-2,711	-4,283	10,341	241	Whatcom
Yakima	196	354	-4,131	-2,539	554	5,277	-289	Yakima
Statewide	-20,404	-52,179	-70,243	-100,965	-3,391	257,360	10,182	Statewide

Behind
Ahead

Source: Authors' calculations

Note: The 2022 estimates are adjusted by the numbers in Table 3 to align with the HAPT 2020 baseline estimates.

Table 8. Additional Housing Production Less Projected Needs, 2020-2022, Cumulative Across AMI Categories

	0-30% AMI	0-50% AMI	0-80% AMI	0-100% AMI	0-120% AMI	Total	
Adams	-103	380	-209				Adams
Asotin	40	-202	-653				Asotin
Columbia	-14	20	14	-2,004	-2,115	908	Columbia
Garfield	32	22	-53				Garfield
Lincoln	112	-136	-225				Lincoln
Whitman	-569	-604	-599				Whitman
Benton	-128	-2,541	-8,592				Benton
Franklin	-160	-1,880	-4,702	-14,235	-12,402	-219	Franklin
Walla Walla	559	73	-1,169				Walla Walla
Chelan	645	984	-332	-1,378	-2,003	1,003	Chelan
Douglas	52	-255	-466				Douglas
Clallam	-146	-487	-2,289	-4,149	-4,666	631	Clallam
Jefferson	-119	-740	-1,241				Jefferson
Cowlitz	-222	-1,715	-4,157				Cowlitz
Pacific	-274	-139	-544	-6,085	-5,365	1,190	Pacific
Wahkiakum	1	9	-142				Wahkiakum
Ferry	61	91	-38				Ferry
Okanogan	53	229	-43	-2,227	-2,294	1,597	Okanogan
Pend Oreille	258	82	-178				Pend Oreille
Stevens	27	-431	-1,147				Stevens
Grant	-369	422	-726	-3,189	-2,617	1,242	Grant
Kittitas	89	-219	-1,124				Kittitas
Grays Harbor	120	-1,487	-1,995	-5,451	-5,581	590	Grays Harbor
Mason	132	529	-1,833				Mason
Island	-333	-852	-1,674				Island
San Juan	-59	45	-89	-10,669	-11,697	408	San Juan
Skagit	-347	-1,029	-5,129				Skagit
Klickitat	29	-25	-533				Klickitat
Lewis	308	-506	-2,747	-5,141	-5,006	642	Lewis
Skamania	-88	-179	-654				Skamania
Clark	-486	1,082	-5,899	-9,729	-8,903	497	Clark
King	-10,453	-29,690	907	-42,502	-46,657	6,979	King
Kitsap	-1,077	-3,308	-12,282	-13,840	-11,312	-957	Kitsap
Pierce	-2,919	-9,960	-28,216	-39,848	-39,024	-307	Pierce
Snohomish	-3,356	-14,690	-12,200	-34,359	-39,107	-3,509	Snohomish
Spokane	-289	-3,650	-24,685	-23,242	-19,922	666	Spokane
Thurston	-536	-780	-10,497	-13,808	-12,847	-1,131	Thurston
Whatcom	-1,071	-1,596	-3,104	-5,815	-10,098	241	Whatcom
Yakima	196	550	-3,581	-6,120	-5,566	-289	Yakima
Statewide	-20,404	-72,583	-142,826	-243,791	-247,182	10,182	Statewide

Behind
Ahead

Source: Authors' calculations

Note: This table cumulates the numbers in Table 7 by AMI category. For example, the data for the 0-50% AMI category are the sums of the 0-30% AMI and 0-50% AMI numbers in Table 7. The Total column also includes the >120% AMI category.

Baseline Numbers and Projected Needs for Emergency Housing and PSH

The Housing Inventory Count (HIC) reports submitted to HUD each year provide the best source of data on the supply of emergency housing and PSH.¹¹ The official reports are provided for five counties (Clark, King, Pierce, Snohomish, and Spokane) and the “balance of state”; however, a breakdown of the data by county for the balance of state is available from the Department of Commerce.¹²

For the purposes of tracking production of emergency housing and PSH, we focus on only some of the data in the HIC reports. Specifically, for emergency housing, we include emergency shelter, Safe Haven, and transitional housing, but not seasonal housing. The seasonal housing measures are quite volatile because the numbers reflect the seasonal housing beds in use on the date of the count, rather than the seasonal housing that is potentially available. Consequently, those numbers do not provide a useful measure of trends in available emergency beds.

Of the permanent housing categories included in the HIC reports, we are interested in only PSH (permanent supportive housing), and not in rapid rehousing or other permanent housing. Rapid rehousing is designed to help tenants obtain housing on a long-term basis but is itself a short-term form of rental assistance with some services. Other permanent housing is public housing that does not necessarily provide services. Both rapid rehousing and other permanent housing would be captured in the analysis of permanent rental housing (mainly in the 0-30% AMI affordability category). Moreover, SSB 5587 specifies that the analysis of permanent housing options should focus on PSH.

One issue is that the HAPT baseline numbers for 2020 often disagree with the HIC reports, particularly for emergency housing. Due to the magnitude of these discrepancies, we are using the numbers from the 2020 HIC reports as baselines for comparison with subsequent HIC reports. However, in the interest of minimizing changes in assumptions that have guided jurisdictions’ planning efforts, we are *not* making any adjustments to the net projected needs as provided in HAPT.

¹¹ The HIC reports are available at: <https://www.hudexchange.info/programs/coc/coc-housing-inventory-count-reports/>. For further details on the methodology for measuring production of emergency and PSH, see Bourassa and Phillips (2026a), available at: <https://wcrer.be.uw.edu/research-reports/>.

¹² However, the sums of the county-by-county data for the balance of state provided by Commerce do not always agree with the corresponding totals in the HIC reports.

Table 9 presents projected PSH needs for the full period from 2020 to the planning horizon shown in the first column. The HAPT projects PSH needs in terms of housing units, while the HIC reports list PSH in terms of beds. Hence we need to convert between units and beds to assess production of PSH. The table converts projected PSH needs expressed in units to needs expressed in beds.¹³ The conversion ratios are taken from HAPT.

Table 9. Projected Net PSH Needs in Units and Beds

	Year	Net PSH Needs (Units)	Conversion Ratio (Units to Beds)	Net PSH Needs (Beds)	
Adams	2047	206	1.33	274	Adams
Asotin	2044	218	1.42	310	Asotin
Benton	2046	2,656	1.40	3,718	Benton
Chelan	2046	920	1.45	1,334	Chelan
Clallam	2045	751	1.30	976	Clallam
Clark	2045	7,490	1.22	9,138	Clark
Columbia	2044	30	2.25	68	Columbia
Cowlitz	2044	1,378	1.30	1,791	Cowlitz
Douglas	2046	0	1.40	0	Douglas
Ferry	2044	54	2.00	108	Ferry
Franklin	2046	1,854	1.38	2,559	Franklin
Garfield	2044	6	2.38	14	Garfield
Grant	2044	813	1.61	1,309	Grant
Grays Harbor	2044	1,113	1.31	1,458	Grays Harbor
Island	2045	762	1.28	975	Island
Jefferson	2045	248	1.37	340	Jefferson
King	2044	42,892	1.27	54,473	King
Kitsap	2044	2,760	1.32	3,643	Kitsap
Kittitas	2046	581	1.50	872	Kittitas
Klickitat	2044	135	1.25	169	Klickitat
Lewis	2045	888	1.58	1,403	Lewis
Lincoln	2044	117	1.41	165	Lincoln
Mason	2045	1,047	1.30	1,361	Mason
Okanogan	2044	445	1.39	619	Okanogan
Pacific	2047	210	1.30	273	Pacific
Pend Oreille	2044	84	1.60	134	Pend Oreille
Pierce	2044	19,465	1.34	26,083	Pierce
San Juan	2045	48	1.27	61	San Juan
Skagit	2045	1,610	1.51	2,431	Skagit
Skamania	2044	61	1.17	71	Skamania
Snohomish	2044	15,138	1.23	18,620	Snohomish
Spokane	2046	5,714	1.59	9,085	Spokane
Stevens	2044	488	1.49	727	Stevens
Thurston	2045	3,594	1.33	4,780	Thurston
Wahkiakum	2044	109	1.21	132	Wahkiakum
Walla Walla	2046	767	1.35	1,035	Walla Walla
Whatcom	2045	3,340	1.45	4,843	Whatcom
Whitman	2044	300	1.88	564	Whitman
Yakima	2046	4,267	1.32	5,632	Yakima

Source: HAPT

¹³ The baseline PSH numbers in HAPT assume one person per unit, but the projected needs assume the ratios shown in Table 9.

Table 10 gives annualized needs for emergency housing and PSH in terms of beds. These are based on the projected net emergency housing needs taken directly from HAPT and the projected net PSH needs converted from units to beds as shown in Table 9. The projected needs in beds are then divided by the number of years between 2020 and the planning horizon given in Table 9. For counties that have not specifically chosen a population projection, projected needs are based on the medium projection.

Table 10. Projected Annual Needs for Emergency Housing and PSH in Beds

	Emergency Housing	PSH	
Adams	1	10	Adams
Asotin	1	13	Asotin
Benton	5	143	Benton
Chelan	12	51	Chelan
Clallam	18	39	Clallam
Clark	159	366	Clark
Columbia	0	3	Columbia
Cowlitz	7	75	Cowlitz
Douglas	2	0	Douglas
Ferry	1	4	Ferry
Franklin	6	98	Franklin
Garfield	0	1	Garfield
Grant	4	55	Grant
Grays Harbor	8	61	Grays Harbor
Island	10	39	Island
Jefferson	22	14	Jefferson
King	2,456	2,270	King
Kitsap	58	152	Kitsap
Kittitas	0	34	Kittitas
Klickitat	4	7	Klickitat
Lewis	19	56	Lewis
Lincoln	0	7	Lincoln
Mason	4	54	Mason
Okanogan	4	26	Okanogan
Pacific	9	10	Pacific
Pend Oreille	0	6	Pend Oreille
Pierce	284	1,087	Pierce
San Juan	1	2	San Juan
Skagit	11	97	Skagit
Skamania	3	3	Skamania
Snohomish	431	776	Snohomish
Spokane	117	349	Spokane
Stevens	2	30	Stevens
Thurston	37	191	Thurston
Wahkiakum	0	5	Wahkiakum
Walla Walla	0	40	Walla Walla
Whatcom	23	194	Whatcom
Whitman	2	24	Whitman
Yakima	53	217	Yakima
Statewide	3,776	6,607	Statewide

Source: WCRER calculations based on HAPT

Emergency Housing and PSH Needs and Net Production for 2020-2025

The most recent HIC reports are for 2025. Hence, we will focus here on comparing projected emergency housing and PSH needs with net production for the five-year period from 2020 to 2025. The needs for the five-year period are based on the numbers in Table 10 and are shown in Table 11.

Table 11. Projected Emergency Housing and PSH Needs for 2020-2025 in Beds

	Emergency Housing	PSH	
Adams	4	51	Adams
Asotin	7	64	Asotin
Benton	26	715	Benton
Chelan	58	257	Chelan
Ciallam	88	195	Ciallam
Clark	797	1,828	Clark
Columbia	0	14	Columbia
Cowlitz	36	373	Cowlitz
Douglas	8	0	Douglas
Ferry	5	22	Ferry
Franklin	30	492	Franklin
Garfield	0	3	Garfield
Grant	19	273	Grant
Grays Harbor	39	304	Grays Harbor
Island	48	195	Island
Jefferson	112	68	Jefferson
King	12,282	11,349	King
Kitsap	290	759	Kitsap
Kittitas	0	168	Kittitas
Klickitat	19	35	Klickitat
Lewis	97	281	Lewis
Lincoln	0	34	Lincoln
Mason	18	272	Mason
Okanogan	20	129	Okanogan
Pacific	46	51	Pacific
Pend Oreille	0	28	Pend Oreille
Pierce	1,422	5,434	Pierce
San Juan	7	12	San Juan
Skagit	57	486	Skagit
Skamania	13	15	Skamania
Snohomish	2,156	3,879	Snohomish
Spokane	584	1,747	Spokane
Stevens	9	151	Stevens
Thurston	187	956	Thurston
Wahkiakum	2	27	Wahkiakum
Walla Walla	0	199	Walla Walla
Whatcom	117	969	Whatcom
Whitman	8	118	Whitman
Yakima	265	1,083	Yakima
Statewide	18,878	33,036	Statewide

Source: WCRER calculations based on HAPT

Table 12 shows production of emergency housing and PSH for the period from 2020 to 2025. These numbers are calculated by subtracting the relevant 2020 HIC report statistics from the corresponding 2025 statistics. A positive number indicates that there was a net addition of beds to the stock, while a negative number indicates that the county had a net loss in beds.

Table 12. Net Production of Emergency Housing and PSH for 2020-2025 in Beds

	Emergency Housing	PSH	
Adams	-1	0	Adams
Asotin	-1	0	Asotin
Benton	94	-17	Benton
Chelan	23	20	Chelan
Clallam	-72	1	Clallam
Clark	375	69	Clark
Columbia	0	0	Columbia
Cowlitz	52	-17	Cowlitz
Douglas	-52	0	Douglas
Ferry	5	0	Ferry
Franklin	209	-12	Franklin
Garfield	-1	0	Garfield
Grant	62	0	Grant
Grays Harbor	35	-31	Grays Harbor
Island	-1	-10	Island
Jefferson	88	0	Jefferson
King	674	1,785	King
Kitsap	118	8	Kitsap
Kittitas	10	14	Kittitas
Klickitat	9	1	Klickitat
Lewis	88	-11	Lewis
Lincoln	21	0	Lincoln
Mason	97	30	Mason
Okanogan	29	-2	Okanogan
Pacific	14	-8	Pacific
Pend Oreille	13	0	Pend Oreille
Pierce	818	538	Pierce
San Juan	7	0	San Juan
Skagit	76	63	Skagit
Skamania	3	-3	Skamania
Snohomish	48	-389	Snohomish
Spokane	255	754	Spokane
Stevens	-40	0	Stevens
Thurston	138	86	Thurston
Wahkiakum	4	0	Wahkiakum
Walla Walla	15	140	Walla Walla
Whatcom	224	-9	Whatcom
Whitman	-2	-8	Whitman
Yakima	-148	142	Yakima
Statewide	3,286	3,134	Statewide

Source: WCRER calculations based on HIC reports

Table 13 shows the results from comparing net production with projected needs for the period from 2020 to 2025. The first two columns are expressed in terms of beds and are calculated by subtracting the projected needs in Table 11 from the additional production in Table 12. The third column converts PSH beds back into units, based on the conversion

ratios in Table 9. As the key indicates, negative numbers indicate that the county is not producing enough housing to meet projected needs, while positive numbers indicate that the county is producing more than enough housing to meet projected needs. Zeroes indicate that the county met the projected need (which itself was zero in a couple of cases).

Table 13. Additional Production Less Projected Needs for 2020-2025

	Emergency Housing (Beds)	PSH (Beds)	PSH (Units)	
Adams	-5	-51	-38	Adams
Asotin	-8	-64	-45	Asotin
Benton	68	-732	-523	Benton
Chelan	-35	-237	-163	Chelan
Clallam	-160	-194	-149	Clallam
Clark	-422	-1,759	-1,441	Clark
Columbia	0	-14	-6	Columbia
Cowlitz	16	-390	-300	Cowlitz
Douglas	-60	0	0	Douglas
Ferry	0	-22	-11	Ferry
Franklin	179	-504	-365	Franklin
Garfield	-1	-3	-1	Garfield
Grant	43	-273	-169	Grant
Grays Harbor	-4	-335	-256	Grays Harbor
Island	-49	-205	-160	Island
Jefferson	-24	-68	-50	Jefferson
King	-11,608	-9,564	-7,530	King
Kitsap	-172	-751	-569	Kitsap
Kittitas	10	-154	-102	Kittitas
Klickitat	-10	-34	-27	Klickitat
Lewis	-9	-292	-185	Lewis
Lincoln	21	-34	-24	Lincoln
Mason	79	-242	-186	Mason
Okanogan	9	-131	-94	Okanogan
Pacific	-32	-59	-45	Pacific
Pend Oreille	13	-28	-18	Pend Oreille
Pierce	-604	-4,896	-3,654	Pierce
San Juan	0	-12	-10	San Juan
Skagit	19	-423	-280	Skagit
Skamania	-10	-18	-15	Skamania
Snohomish	-2,108	-4,268	-3,470	Snohomish
Spokane	-329	-993	-625	Spokane
Stevens	-49	-151	-102	Stevens
Thurston	-49	-870	-654	Thurston
Wahkiakum	2	-27	-23	Wahkiakum
Walla Walla	15	-59	-44	Walla Walla
Whatcom	107	-978	-674	Whatcom
Whitman	-10	-126	-67	Whitman
Yakima	-413	-941	-713	Yakima
Statewide	-15,592	-29,902	-22,790	Statewide

■ Behind
■ Meets Needs
■ Ahead

Source: WCRER calculations based on HIC reports

The main conclusion from Table 13 is that the state is experiencing large deficits in production of emergency housing and PSH relative to projected need. All counties but one show deficits in production of PSH, and most counties show deficits in production of emergency housing. Comparing the statewide numbers from Tables 12 and 11, the net production of emergency housing during 2020-2025 represented only 17.4% of projected needs, while the net production of PSH reflected only 9.5% of projected needs.

Apportioning Extremely Low-Income Units between PSH and Non-PSH

For the purposes of projecting needs for permanent housing at different affordability levels, the HAPT divides the 0-30% AMI category into two parts: PSH and non-PSH. The assumption is that all PSH is affordable to extremely low-income households (in the 0-30% AMI category). To allow for tracking of the production of these two components of that income range, we need to assess PSH production for a different time period. The analysis of permanent housing production for different income ranges relies in part on CHAS data (Bourassa and Phillips, 2026b) and, as discussed above, the most recent CHAS data are for 2022. As we do not have reliable PSH data for the balance-of-state counties for that year, we can provide the non-PSH versus PSH breakdown only for the five counties that have individual HIC reports, the balance-of-state combined, and statewide.¹⁴ This analysis is shown in Table 14.

Table 14. Apportionment of 0-30% AMI Production Less Needs Between non-PSH and PSH, 2020-2022

	Non-PSH	PSH	Total		
Clark	88	-574	-486	Clark	
King	-7,301	-3,152	-10,453	King	
Pierce	-1,430	-1,489	-2,919	Pierce	
Snohomish	-1,921	-1,435	-3,356	Snohomish	
Spokane	-29	-260	-289	Spokane	
Balance of State	-700	-2,201	-2,901	Balance of State	
Statewide	-11,293	-9,111	-20,404	Statewide	

Behind
 Ahead

Source: Authors' calculations based on HIC reports (PSH numbers) and analysis of CHAS data (see Table 7 above).

¹⁴ The conversion factor for the balance of state is calculated as the weighted average of the 2020 ratios, with the weights defined as the numbers of beds.

The general conclusion from Table 14 is that the state experienced deficits in net production less needs in both the PSH and non-PSH components of the 0-30% AMI category. Of the counties listed individually in the table, only Clark shows a positive number for non-PSH units.

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Fritzel, A. A., and Hodgson, L., editors, *Establishing Housing Targets for Your Community: County-Level Considerations for Housing Planning*, Olympia, WA: Local Government Division, Growth Management Services, Department of Commerce, 2023.

Appendix: Public Use Microdata Areas (PUMAs) and Counties

Single counties contiguous with one or more PUMAs:

- Clark
- King
- Kitsap
- Pierce
- Skagit
- Snohomish
- Spokane
- Thurston
- Whatcom
- Yakima

Multiple-county PUMAs:

- Adams, Asotin, Columbia, Garfield, Lincoln, and Whitman
- Benton, Franklin, and Walla Walla
- Chelan and Douglas
- Clallam and Jefferson
- Cowlitz, Pacific, and Wahkiakum
- Ferry, Okanogan, Pend Oreille, and Stevens
- Grant and Kittitas
- Grays Harbor and Mason
- Island and San Juan
- Klickitat, Lewis, and Skamania

Notes: PUMAs are the geographic areas for which PUMS data are reported. For example, data for King County can be obtained by aggregating data for the PUMAs within that county; however, data for Chelan and Douglas counties are available only for the two counties combined. The three PUMAs that make up Benton, Franklin, and Walla Walla counties are not contiguous with county boundaries, unlike the other PUMAs in the state; for this reason, the three counties are combined for the purposes of reporting PUMS data.

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Contact Us

WCRER staff

Steven C. Bourassa, Director
Mason Virant, Associate Director
Christian Phillips, Research Assistant
Fedor Efimov, Research Assistant

Postal address

Washington Center for Real Estate Research
College of Built Environments
University of Washington
Box 355727
Seattle, WA 98195

Email

wcrer@uw.edu

Follow us on LinkedIn

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