

BEFORE THE COUNCIL OF THE
METROPOLITAN SERVICE DISTRICT

FOR THE PURPOSE OF ADOPTING THE)	RESOLUTION NO. 84-497
YEAR 2005 FORECAST OF POPULATION)	
AND EMPLOYMENT FOR USE IN METRO'S)	Introduced by the Joint
FUNCTIONAL PLANS)	Policy Advisory Committee
)	on Transportation

WHEREAS, Planning for transportation, solid waste disposal and other infrastructure needs should be based on a 20 or more year forecast, commensurate with the economic life of such investments; and


WHEREAS, The state and federal transportation departments require this horizon for planning purposes; and

WHEREAS, The forecast contained in the attachment to this Resolution marked Exhibit A is the result of a series of workshops involving a large number of experts and professionals in this region and has their consensus as a forecast which is reasonable and appropriate for long-range planning in this region; now, therefore,

BE IT RESOLVED,

That the Metro Council adopts the forecast for this urban area as contained in the attachment to this Resolution marked Exhibit A as a reasonable and appropriate forecast for use in Metro's functional plans until such time as events clearly indicate the need for revision.

ADOPTED by the Council of the Metropolitan Service District
this 25th day of September, 1984.



Presiding Officer

KL/srb
1914C/392-3
09/13/84

EXHIBIT A

Table 1

TOTAL EMPLOYMENT				TOTAL POPULATION			
DIST	1983	2005	CHANGE	DIST	1983	2005	CHANGE
1	80430	117990	37560	1	11000	11988	988
2	150620	184220	33600	2	314000	321119	7119
3	61740	72520	10780	3	79280	93473	14193
4	19810	24910	5100	4	70600	100218	29618
5	21660	32600	10940	5	85180	127462	42282
20	660	760	100	20	5880	6245	365
MULTCO	334920	433000	98080	MULTCO	565940	660505	94565
6	19210	25710	6500	6	63790	71478	7688
7	8700	25700	17000	7	19030	37743	18713
8	8950	17450	8500	8	44790	67825	23035
9	10450	14450	4000	9	24880	40014	15134
10	8640	18390	9750	10	19950	38879	18929
19	13200	18300	5100	19	78080	104111	26031
CLACKCO	69150	120000	50850	CLACKCO	250520	360050	109530
11	6950	17500	10550	11	15600	27744	12144
12	16410	30750	14340	12	32000	46818	14818
13	43750	76180	32430	13	75332	85581	10249
14	11170	44860	33690	14	62780	123795	61015
15	13930	31940	18010	15	33110	61800	28690
16	6000	10100	4100	16	20920	33089	12169
18	9450	15680	6230	18	21040	27483	6443
WASHCO	107660	227010	119350	WASHCO	260782	406310	145528
CLARKCO	73190	130000	56810	CLARKCO	200000	312705	112705
SMSA	584920	910010	325090	SMSA	1277242	1739570	462328

**EXHIBIT A
Table 2**

SINGLE FAMILY DWELLING UNITS

DIST	1983	2005	CHANGE
1	200	200	0
2	95650	95750	100
3	20490	24490	4000
4	22080	24080	2000
5	21510	33510	12000
20	2130	2280	150
MULTCO	162060	180310	18250
6	19200	21700	2500
7	6050	11650	5600
8	13690	20990	7300
9	6960	11960	5000
10	5610	11610	6000
19	24660	34785	10125
CLACKCO	76170	112695	36525
11	3800	6650	2850
12	8560	12710	4150
13	18280	21000	2720
14	16930	32320	15390
15	9010	17200	8190
16	5530	8810	3280
18	7050	8910	1860
WASHCO	69160	107600	38440
CLARKCO	59710	98000	38290
SMSA	367100	498605	131505

MULTI FAMILY DWELLING UNITS

DIST	1983	2005	CHANGE
1	6900	9000	2100
2	41820	50920	9100
3	20260	23060	2800
4	9980	20980	11000
5	9700	16700	7000
20	120	120	0
MULTCO	88780	120780	32000
6	6520	7520	1000
7	1180	4060	2880
8	3450	5450	2000
9	2130	2830	700
10	1950	3750	1800
19	1910	2680	770
CLACKCO	17140	26290	9150
11	2250	5250	3000
12	4940	9000	4060
13	14405	18025	3620
14	6520	16500	9980
15	2985	6625	3640
16	2440	4500	2060
18	360	600	240
WASHCO	33900	60500	26600
CLARKCO	17000	24200	7200
SMSA	156820	231770	74950

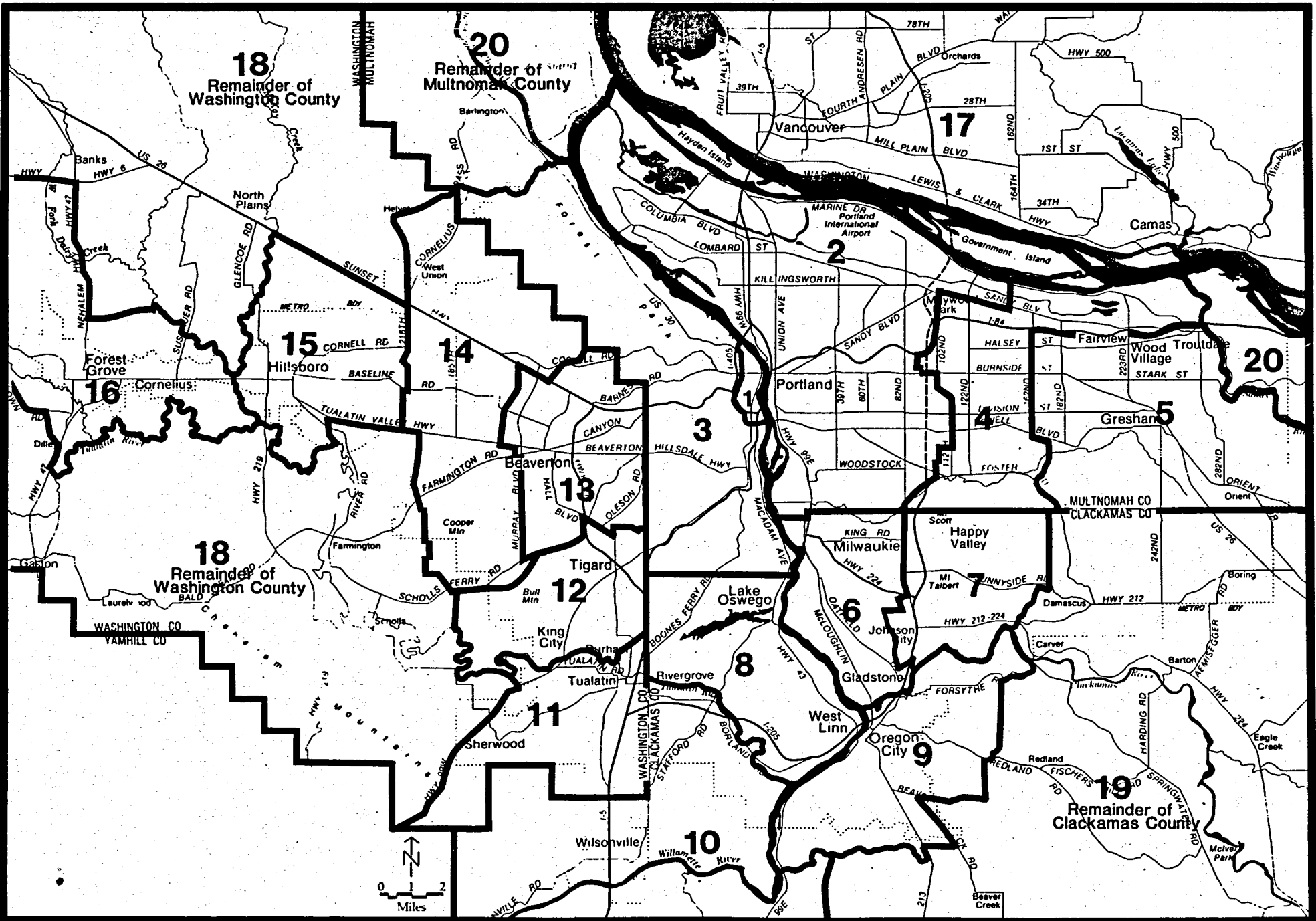
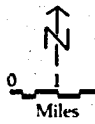


EXHIBIT A



Growth Allocation Workshop
Portland Metro Area

20 DISTRICTS



STAFF REPORT

Agenda Item No. 8.1

Meeting Date Sept. 25, 1984

CONSIDERATION OF RESOLUTION NO. 84-497 FOR THE
PURPOSE OF ADOPTING THE YEAR 2005 FORECAST OF
POPULATION AND EMPLOYMENT FOR USE IN METRO'S
FUNCTIONAL PLANS

Date: August 30, 1984

Presented by: Keith Lawton

FACTUAL BACKGROUND AND ANALYSIS

Proposed Action

To adopt the forecast described by Exhibit A, Resolution No. 84-497, as the basis for infrastructure investment decisions made as a result of Metro's functional plans.

History

This forecast is the outcome of a significant discussion and debate among a group of professionals whose jobs involve them in forecasting. These professionals represent both public and private sectors, and both regional and local interests.

The Regional Growth Forum, consisting of regional economists and demographers representing the public and private sectors (see attached list of members), developed a consensus on the likely forecast for the four-county area (Clackamas, Clark, Multnomah and Washington Counties). This group started by reviewing the output and assumptions of an econometric model for the Northwest (developed for Bonneville Power Administration by Wharton Econometrics) and developed a consensus forecast through a process of three three-hour meetings. The outcome of the Regional Growth Forum was a forecast of 871,000 jobs and a population of 1.67 million people in the region by 2005.

The Growth Allocation Workshops were composed of planners/administrators invited from every jurisdiction in the region. All jurisdictions of reasonable size and which could expect significant growth were represented (see attached list of attendees).

The first task of this group was to review the regional forecast. The result of this was an opinion that the forecast for the electronics sector was probably low; based on the immediately visible activity at the local level, the growth in this sector was boosted by 10,000 jobs (from 43,000 total to 53,000 total in 2005).

This action moved the regional forecast from 871,000 employees and 1.67 million population to 910,000 employees and 1.73 million population.

This group met for a total of 16 hours over three days, meeting as a whole to develop a consensus on subregional forecasts (by County and for the Portland Central Business District) followed by three three-hour meetings (one for each Oregon county) to break these down further to the 20 districts displayed in Exhibit A.

This forecast has a population at 2005, approximately equal to that used in the Regional Transportation Plan for year 2,000 and an employment level 50,000 lower (910,000 in 2005 versus 960,000 in 2000).

TPAC and JPACT have reviewed this forecast and recommend approval of the Resolution.

EXECUTIVE OFFICER'S RECOMMENDATION

The Executive Officer recommends approval of Resolution No. 84-497.

KL/srb
1914C/392-4
09/13/84

2005 GROWTH ALLOCATION WORKSHOP PARTICIPANTS

(Workshops Held August 7, 16 and 23, 1984)

<u>Name</u>	<u>Affiliation</u>
Tom Vanderzanden	Clackamas County
Norm Scott	Clackamas County
Ben Altman	City of Wilsonville
Mark Hess	City of West Linn
Lori Mastrantonio	City of Milwaukie
Gilbert Mallery	Regional Planning Council of Clark County
Laurel Lyon	Regional Planning Council of Clark County
Mary Legry	Regional Planning Council of Clark County
Dean Lookingbill	Regional Planning Council of Clark County
Azam Babar	City of Vancouver
Bebe Rucker	Multnomah County
Steve Dotterer	City of Portland
Steve Iwata	City of Portland
James Throckmorton	City of Portland
Tim Goon	City of Portland
Rick Walker	City of Gresham
Jeff Davis	City of Gresham
R. Scott Pemble	City of Troutdale
Brent Curtis	Washington County
Jane Jensen-Norman	Washington County
Mark Brown	Washington County
Frank Angelo	Washington County
Mark Johnson	City of Forest Grove
Wink Brooks	City of Hillsboro
Debbie Noble	City of Hillsboro
John Gillam	City of Beaverton
Larry Cole	City of Beaverton
Elizabeth Newton	City of Tigard
Dave Prescott	City of Tualatin

REGIONAL GROWTH FORUM

List of Participants

Mr. Ray Broughton
Vice President and Economist
First Interstate Bank

Dr. John Mitchell
Corporate Economist
U.S. Bank Corp

Mr. Charles Allcock
Senior Planning Supervisor
Electric Business Planning
Portland General Electric

Mr. Steve Peterson
Director, Economic Development
Portland Development Commission
(Alternate: Betsy Radigan)

Dr. Fred Weber
Consulting Economist
Home Builders Association of
Metropolitan Portland

Dr. James Strathman
Associate Professor
Dept. of Urban Studies and Planning
Portland State University

Mr. Glenn Vanselow
Research Manager
Port of Portland

Mr. Tom Lynch
Director, Labor Market Information
Programs
Oregon State Employment Service

Mr. Charles Schneider
Chief Economist
Economic Research Section
Bonneville Power Administration

Mr. Ed. Schafer
Director, Center for Population Research
and Census
Portland State University

Mr. Scott Hannigan
Manager, Load Forecasting and Analysis Dept.
Pacific Power and Light
(Alternate: Dave Clement)

Mr. Chris Sturm
Research Manager
Portland Chamber of Commerce

SUMMARY REPORT
REGIONAL GROWTH FORECAST
1983 to 2005

I. REGIONAL FORECAST

EMPLOYMENT

It is assumed that economic activity, creating, maintaining, or losing jobs is the basic determinant of the future in a long-term context. Population would be dependent on employment.

Manufacturing jobs are assumed to grow at a slightly lower rate than jobs as a whole. These can be grouped as follows:

- High Growth Sectors: Transportation equipment, fabricated metals, machinery, electronics and printing. The first three helped by assumed increases in Pacific Rim trade.
- Low Growth Sectors: Lumber, primary metals, pulp and paper.
- Loss Sector: Food processing.

Non-Manufacturing jobs are assumed to grow at a slightly higher rate than jobs as a whole. These can be grouped as follows:

- High Growth Sectors: Services (particularly business), trade (wholesale and retail), finance, insurance and real estate, and self-employed. These sectors will be positively impacted by increases in Pacific Rim trade and an increase in two wage earner households.
- Low Growth Sectors: Transportation, communications and public utilities, government, construction.
- Loss Sectors: Agricultural, mining and fisheries.

Employment Growth. The net effect of all of the changes is a return to a growth rate comparable to that experienced in the 1960 to 1975 period. The mix of job sectors being significantly different.

TABLE 1 - EMPLOYMENT FORECASTS

Year	1980	1983	1990	1995	2000	2005
Employment (1,000s)	620	585	686	762	836	910
Growth Rate (Emp./Year)	-11,700	14,400	15,200	14,800	14,800	

The historical perspective is shown in Graph 1, Employment - Past and Forecast.

POPULATION

In the growth forecast procedure, change in labor force participation rates was examined by age and by sex. The net result was a change from 47 percent to 52 percent of population participating in the labor force. This is lower than suggested by past overall trends, and primarily reflects assumptions on a limit of 75 percent for women in the 25- to 34-year old age group (about 65 percent of this group are employed today).

Birth rates were assumed to change from the current 1.8 births per woman to 2.1 births per woman (replacement) by 2005.

Mortality rates used are those from the Center for Population Research and Census (CPRC) developed for Oregon and are assumed to remain unchanged over the forecast period.

The sex/age distribution of the net migrant population is assumed to be the same as that estimated by CPRC for the 1970 to 1980 period. This implicitly covers the net changes wrought by both out- and in-migration.

TABLE 2 - POPULATION FORECASTS

Year	1980	1983	1990	1995	2000	2005
Population (1,000s)	1,246	1,259	1,404	1,509	1,599	1,740
Growth Rate (Persons/Year)	4,300	20,700	21,000	18,000	28,200	

HOUSING

The first assumption to be made is on household size. For the Portland SMSA this has gone from a high of 2.99 persons per household in 1960 to 2.59 persons per household in 1980. This decline is assumed to level off to an average of 2.45 by year 2005.

The second issue is that of the mix of detached and attached housing. In 1960 the mix was 82 percent detached, 18 percent attached. New construction 1960 to 1983 was at a net rate of 55 percent detached to 45 percent attached, leading to a mix of 70 percent detached to 30 percent attached. These changes were due to the rapid formation of young households (baby boom group) and assumptions on the acceptability of condominium living as a lifestyle change for those who had choice. The experience of a lack of acceptance of condominium living in the region, coupled with the maturing of the baby boom generation,

leads to an assumption of a 65 percent detached to 35 percent attached split in new housing construction.

For an analysis of future needs, assumptions of vacancy rates were set at 9 percent for attached and 2.75 percent for detached dwelling units. The above assumptions led to the housing demand shown in Table 3.

TABLE 3 - HOUSING

<u>Year</u>	<u>1980</u>	<u>1983</u>	<u>1990</u>	<u>1995</u>	<u>2000</u>	<u>2005</u>
Detached Units	353,600	367,100	398,700	432,100	459,100	498,600
Units/Year	4,500	4,500	6,700	5,400	7,900	
Attached Units	150,200	156,800	173,800	191,800	206,300	231,800
Units/Year	2,200	2,400	3,600	2,900	5,100	
Total Units	503,800	523,900	572,500	623,900	665,400	730,400
Units/Year	6,700	6,900	10,300	8,300	13,000	

II. SUB-REGIONAL ALLOCATION OF GROWTH

The allocation of growth to subareas is carried out in reverse order, housing first, from which population is estimated, and, finally, employment. The growth was allocated to 20 large planning districts.

HOUSING

Detached dwelling units, also known as single family dwelling units, were assumed to follow past trends with changes in trends occurring as areas filled up. Very little growth is expected in Multnomah County with the exception of District 5, the Gresham, Troutdale, Wood Village area, where growth is expected to continue; and District 3, where the primary growth is expected to be in Forest Park Estates. Clackamas County is expected to maintain growth in the rural and non-contiguous urban growth areas (District 19) and District 8 (Lake Oswego, West Linn). Washington County is expected to see continued growth with the areas of emphasis moving from District 13 (Beaverton) to 14 and 15 (Aloha and Hillsboro). Clark County is expected to grow as fast as Washington County. See Table 2, Exhibit A, Resolution No. _____.

Attached dwelling units, also known as multi-family dwelling units were allocated in much the same manner. Multnomah County is expected to have the highest growth with District 4 (Mid-County) showing the expected influence of provision of sewers, the Banfield Light Rail and numerous large developable lots. District 5 (Gresham area) following recent trends, plus the expected impact of the LRT investment is also expected to see growth in attached units. Clackamas County is expected to

show slow growth with minor concentrations in District 7 (Clackamas Town Center area), and District 8 (Lake Oswego, West Linn). Washington County is expected to see a continued strong growth in these units with concentrations in Aloha, Beaverton and Hillsboro. Clark County is expected to show a continued moderate growth. See Table 2, Exhibit A, Resolution No. _____.

POPULATION

The method for estimation here was to use the dwelling units previously allocated with assumptions on vacancy and household size by type (attached/detached) and by district. The household sizes were assumed to be the same as in the 1980 Census (for each district) reduced by the same percentage as the overall assumed reduction in household size for the region as a whole. This gave the population allocation shown in Table 1, Exhibit "A," Resolution No. _____.

EMPLOYMENT

It was assumed that the Central Business District (District 1) would maintain its past strong share in the region's growth. Growth in District 2 was also expected, partially a re-employment of recently lost workers and also to reflect expected growth in the Lloyd Center area and the Columbia-South Shore area. Growth in Clackamas County is expected to be concentrated in the Clackamas Town Center and Highway 212/224 areas. Washington County is expected to see strong growth with existing trends, availability of desirable serviced land in large lots, very aggressive marketing by the private and quasi-public sectors, and an expected trend towards moving from a bedroom community to a more balanced community supplying the impetus. This growth is expected primarily in the Beaverton-Aloha-Hillsboro corridor. Clark County is also expected to experience significant growth with an assist from the I-205 completion, a supportive tax structure and aggressive marketing. Table 1, Exhibit "A," Resolution No. _____, shows the outcome of the allocation process.

KL/srb
1989C/396-2
09/12/84

EMPLOYMENT PAST AND FORECAST

EMPLOYEES
IN THOUSANDS

GROWTH ALLOCATION WORKSHOPS

