Metro 2010 – 2035 Growth distribution

Presentation to Service & School Districts

Metro

January 22, 2013

Metro | *Making a great place*

Regional growth distribution

Agenda topics

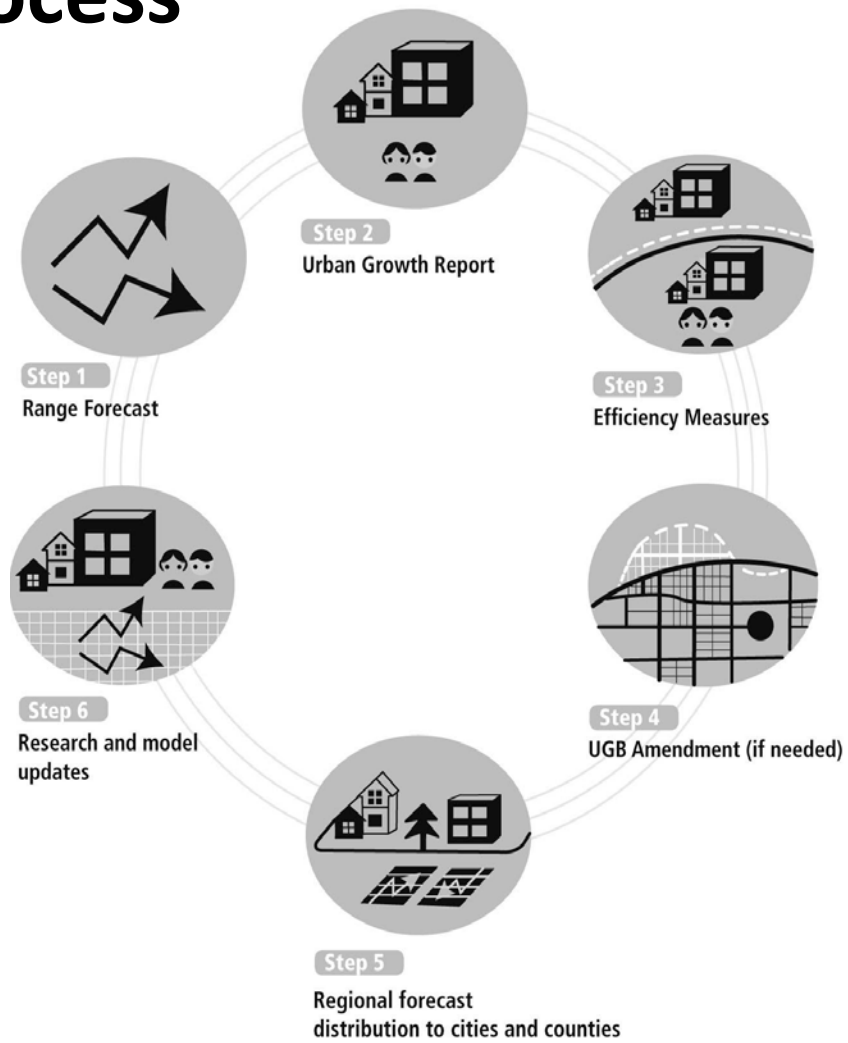
- Background, purpose
- Technical overview/assumptions
- Growth forecast, land supply, and allocation procedures
- Key regional results and rationale
- Implications for service providers
- Detail of westside/TVFR service area results (TAZ level map)
- Accessing the data
- Q&A

Metro planning and forecasting coordination: State coordination requirements

<u>Population and employment forecasts</u>

Metro is responsible for coordinating its regional forecast with the forecasts of local governments in the region (ORS 195.036; 195.025).

Growth management/population and employment 5-year coordination process



Step 1

Range Forecast

How many more household and jobs will we have in the 7 county area and what share of these will be in the UGB?

Step 2

Urban Growth Report

How much of the region's growth can we meet in the current UGB and what is the additional need, if any?

Step 3

Efficiency Measures

What actions can increase the capacity to meet anticipated growth in the UGB, if needed?

Step 4

UGB Amendment (if needed)

If a UGB expansion is needed, which areas are most suitable to include to meet the region's forecast need for jobs and housing?

Step 5

Regional forecast distribution to cities and counties

Where will the forecast growth locate within the region?

Step 6

Research and model updates

What policy questions do we anticipate for the next UGB review cycle and what analysis can support the decisions?

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What the information entails

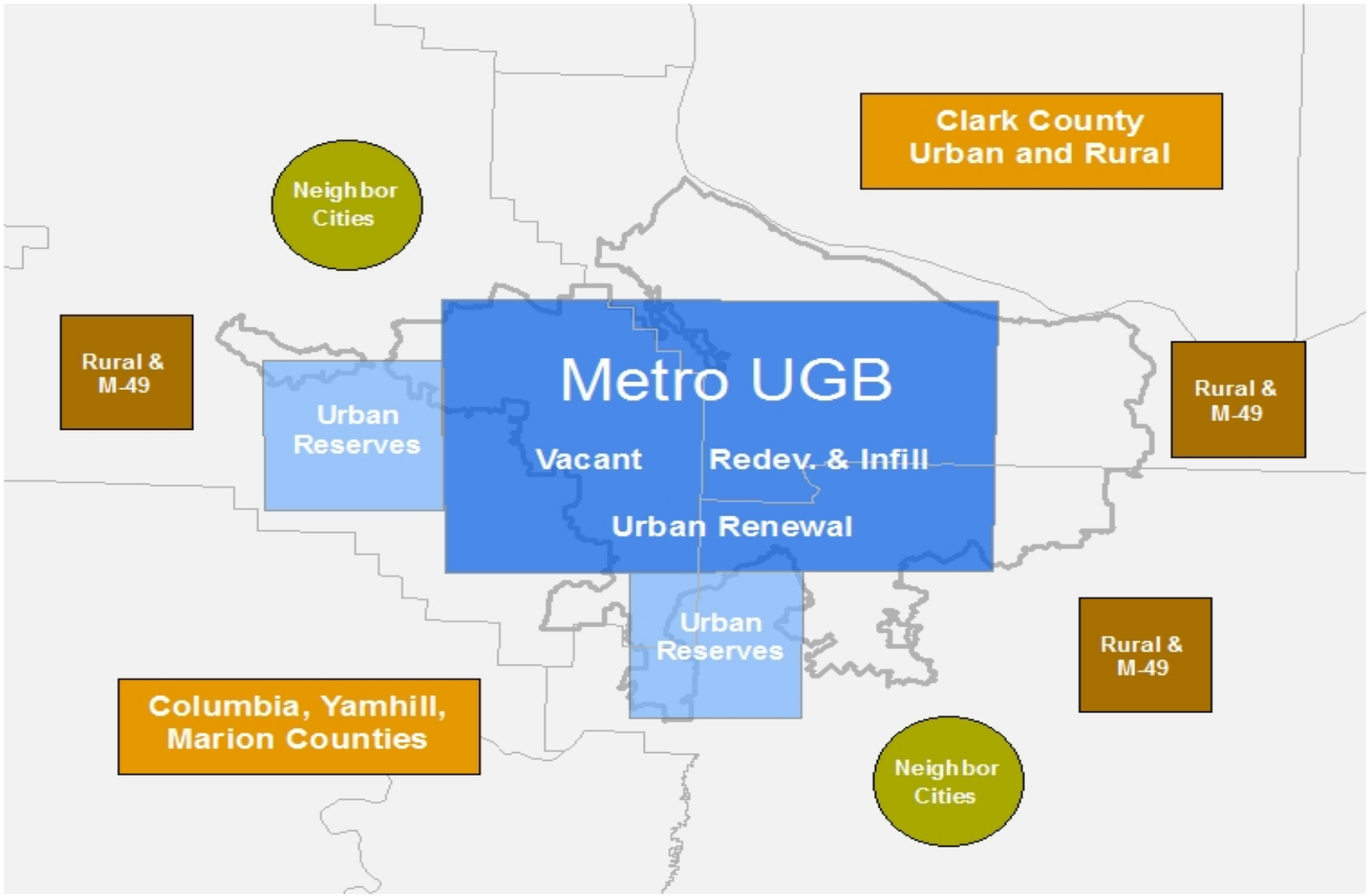
- Based on current plans, policies
- 2035 –
  - Distribution of single-family and multi-family housing units
  - City/county populations
  - Distribution of different types of employment

How this supports ongoing efforts

- Regional/Metro planning
- Local governments:
  - Comprehensive plan updates
  - Transportation system plan updates
  - Plan for extension and upgrade of pipes, roads, other essential public structures
  - Coordination planning in areas outside UGB
- Special districts and schools facility planning and enrollment forecasting

Supply assumptions

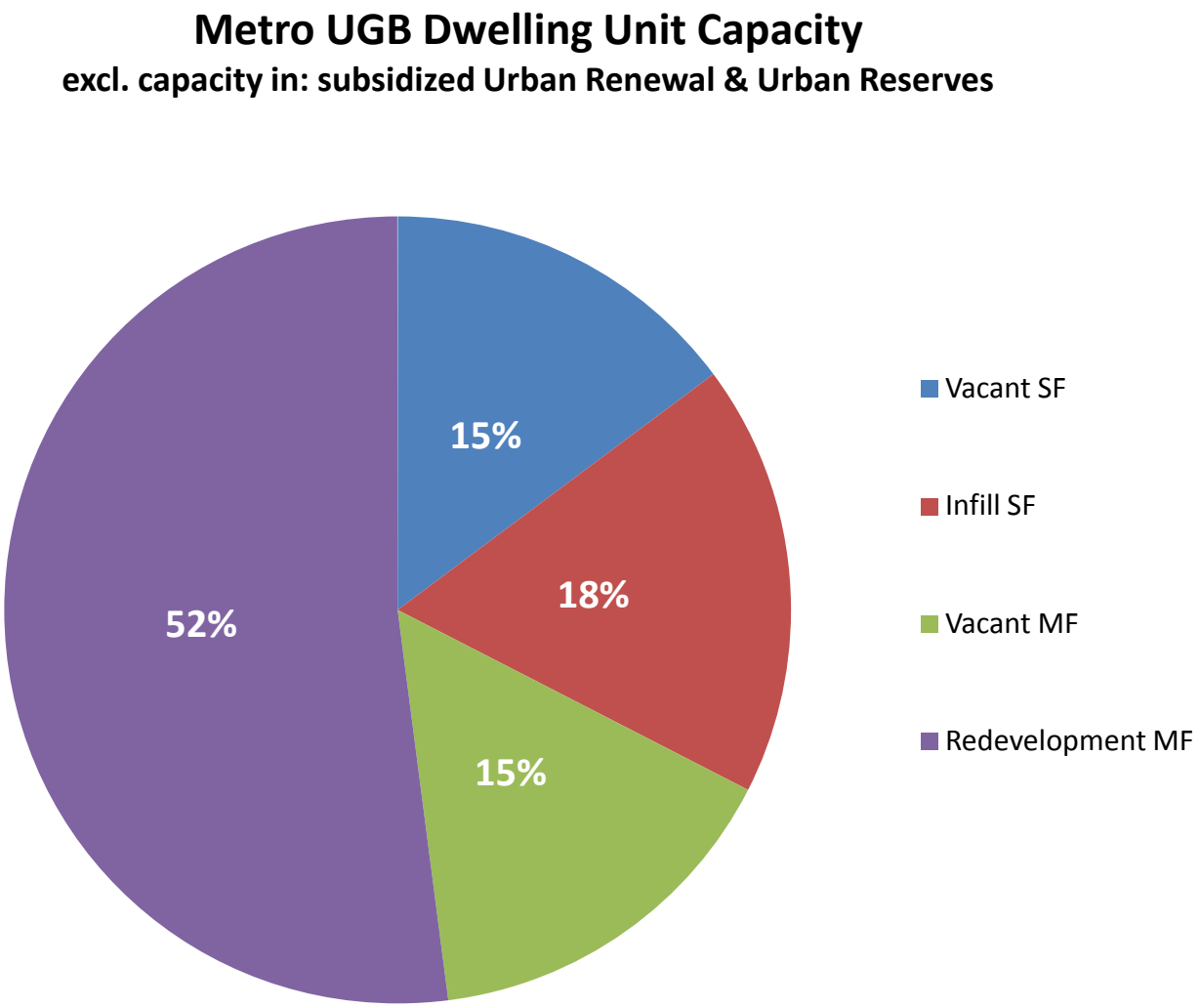
Estimated land supply /capacity estimates (buildable land inventory)



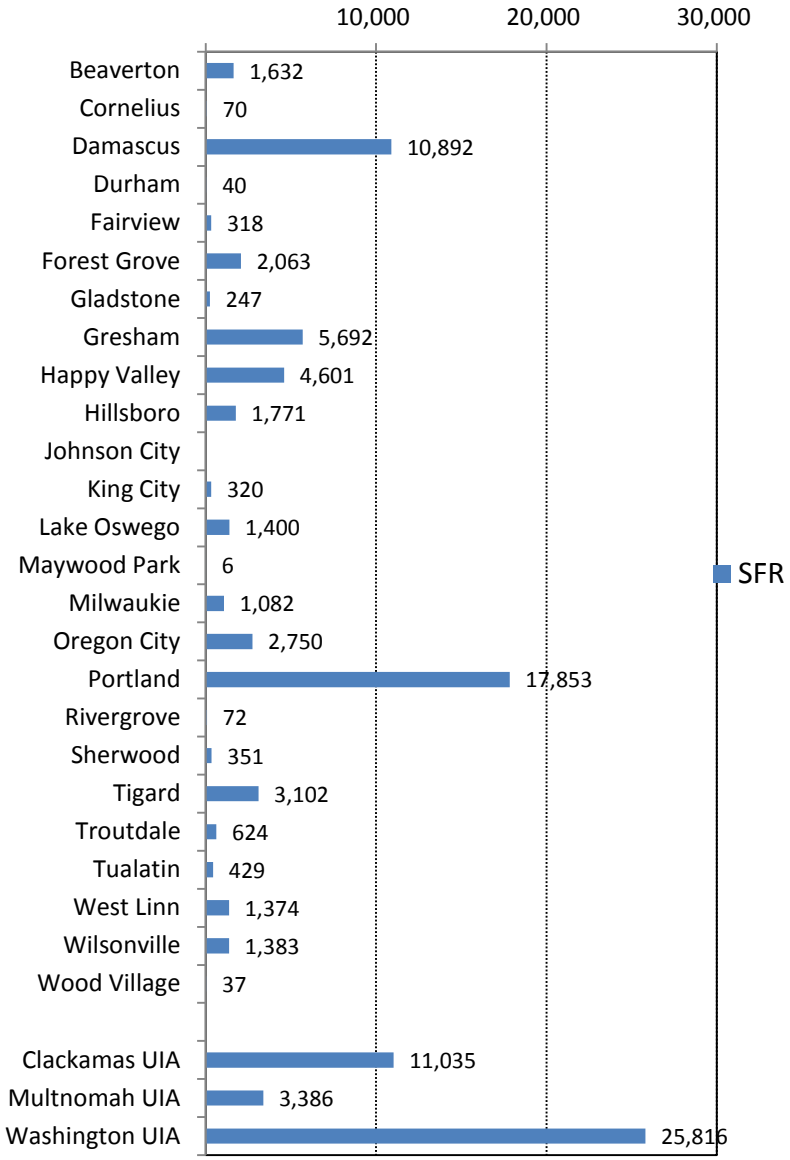
Refining buildable land supply methods/assumptions

- Vacant and redevelopment
  - Single family residential
  - Multifamily residential
  - Mixed use residential
  - Commercial
  - Industrial
- New urban areas (post 1997 UGB amendments)
- Urban reserve
- Urban renewal

Dwelling unit capacity by source



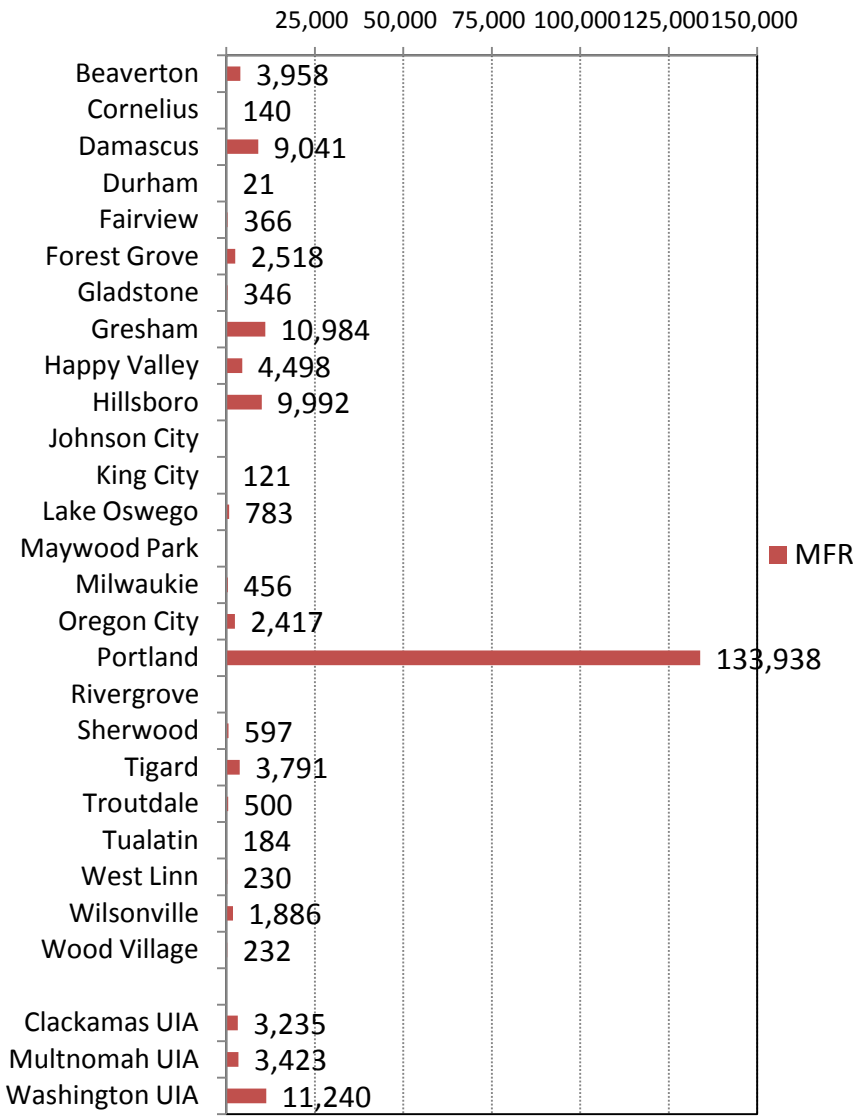
Single Family Residential Capacity
(Metro UGB)



SF Residential Capacity	% of UGB
Beaverton	1.7%
Cornelius	0.1%
Damascus	11.1%
Durham	0.0%
Fairview	0.3%
Forest Grove	2.1%
Gladstone	0.3%
Gresham	5.8%
Happy Valley	4.7%
Hillsboro	1.8%
Johnson City	0.0%
King City	0.3%
Lake Oswego	1.4%
Maywood Park	0.0%
Milwaukie	1.1%
Oregon City	2.8%
Portland	18.2%
Rivergrove	0.1%
Sherwood	0.4%
Tigard	3.2%
Troutdale	0.6%
Tualatin	0.4%
West Linn	1.4%
Wilsonville	1.4%
Wood Village	0.0%
Clackamas UIA	11.2%
Multnomah UIA	3.4%
Washington UIA	26.2%
TOTAL IN-UGB	100.0%

Multi-Family Residential Capacity

(Metro UGB)



MF Residential Capacity % of UGB	
Beaverton	1.9%
Cornelius	0.1%
Damascus	4.4%
Durham	0.0%
Fairview	0.2%
Forest Grove	1.2%
Gladstone	0.2%
Gresham	5.4%
Happy Valley	2.2%
Hillsboro	4.9%
Johnson City	0.0%
King City	0.1%
Lake Oswego	0.4%
Maywood Park	0.0%
Milwaukie	0.2%
Oregon City	1.2%
Portland	65.4%
Rivergrove	0.0%
Sherwood	0.3%
Tigard	1.9%
Troutdale	0.2%
Tualatin	0.1%
West Linn	0.1%
Wilsonville	0.9%
Wood Village	0.1%
Clackamas UIA	1.6%
Multnomah UIA	1.7%
Washington UIA	5.5%
TOTAL IN-UGB	100.0%

Growth distribution: elements

Demand distribution: how does it work?

Policy option inputs

Transport investment –Land use regulation – Regional growth rates

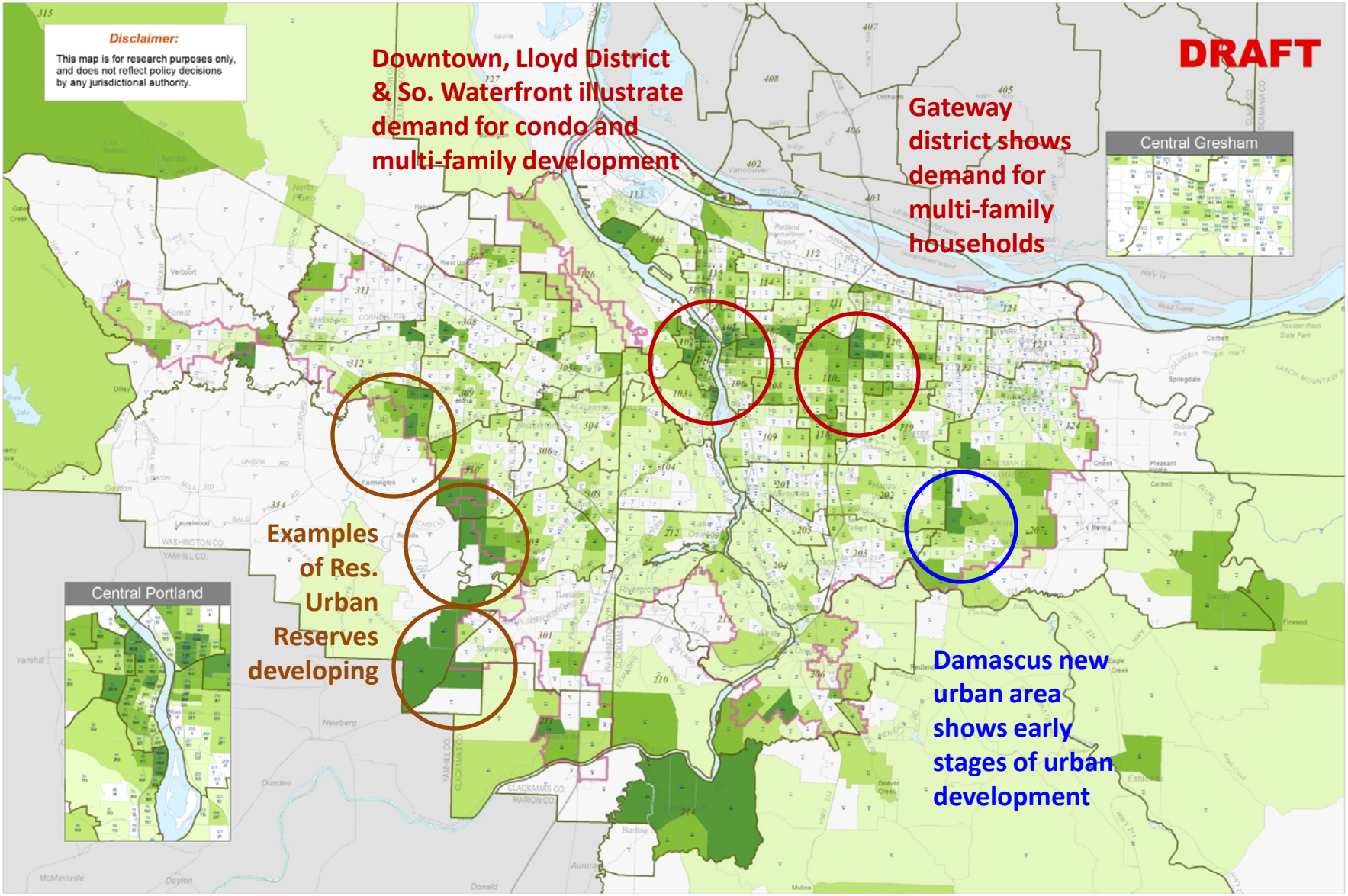
Calculations

SF/MF dwelling units & employment

Travel, mode choice, land supply, travel times, real estate prices, household location by type, etc.

Evaluation indicators

VMT, mode shares, congestion, housing costs by income, transportation costs by income, infrastructure costs, GHG emissions, **land consumption,** etc.



Total Household Growth

- > 1000
- 501 - 1000
- 201 - 500
- 51 - 200
- < 50

TAZ Labels:

42 - TAZ 2162
238 - Households

Household Growth Distribution from 2010 to 2035 by TAZ

MetroScope Jurisdiction Reviewed TAZ 'Gamma' Forecast

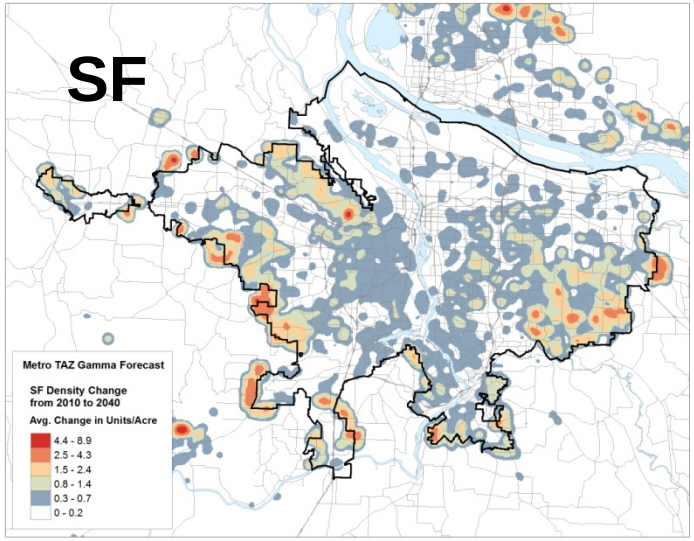
Urban Growth Boundary

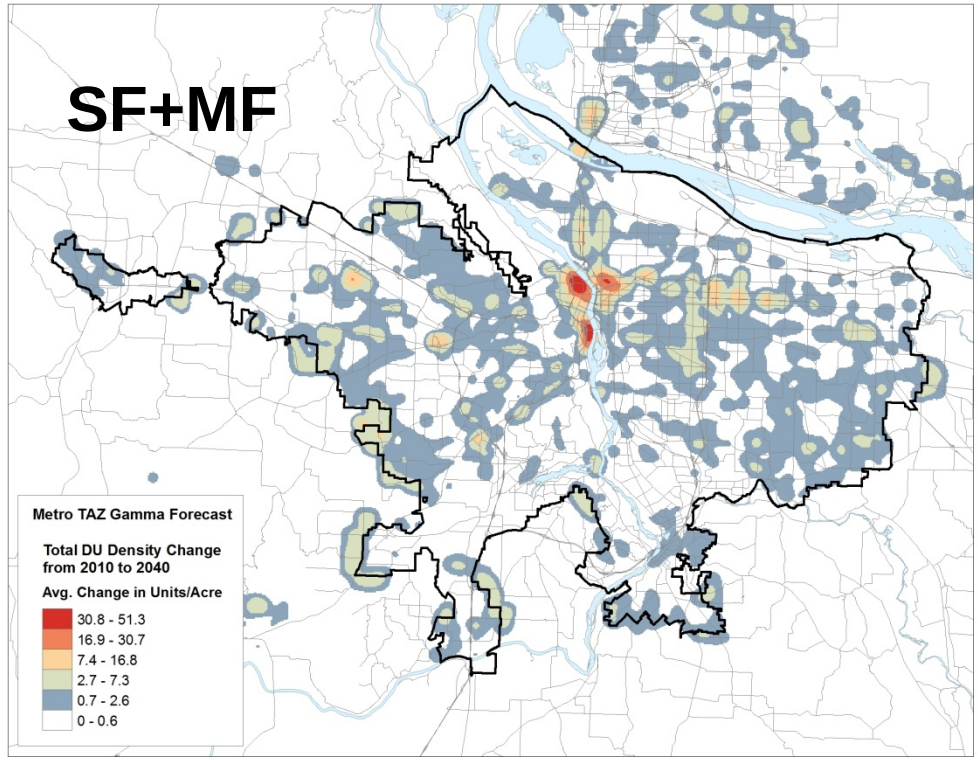
Employment Zones

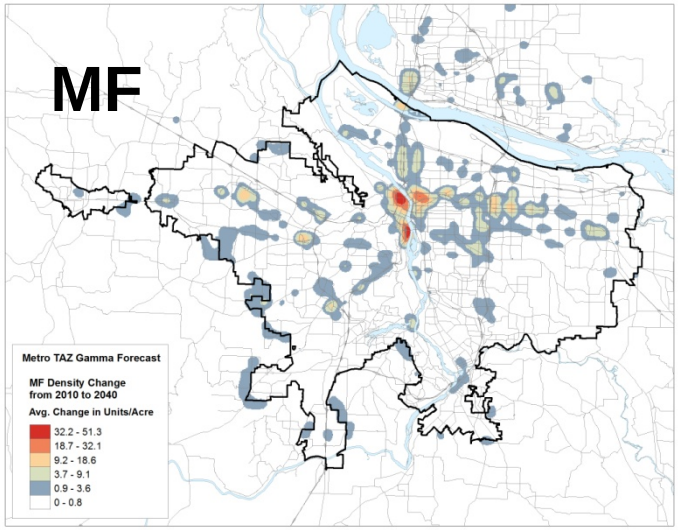
Note: the standard MetroScope employment zone boundaries have been adjusted to align with TAZs.

Metro Economic and Land Use Forecasting

Growth distribution: households



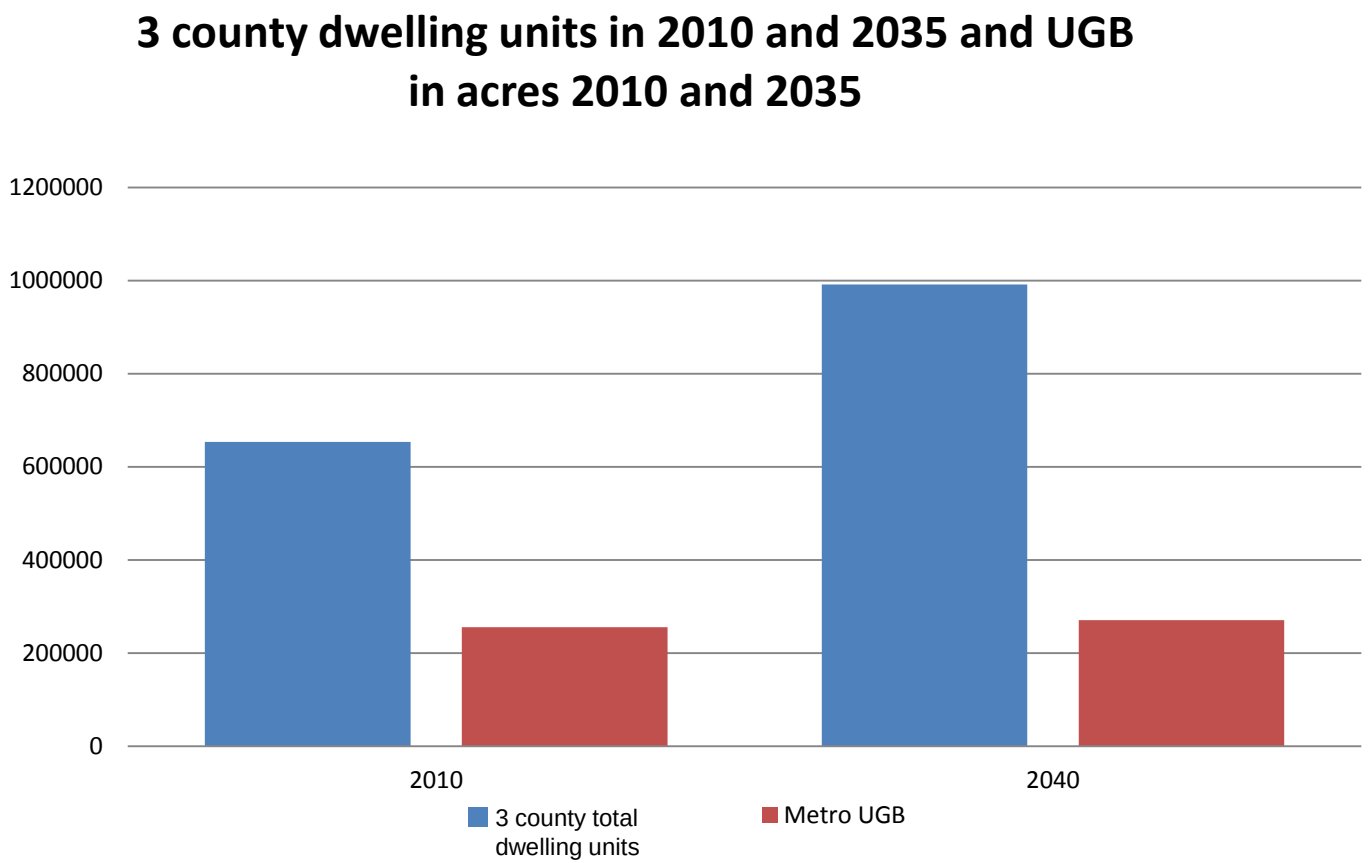




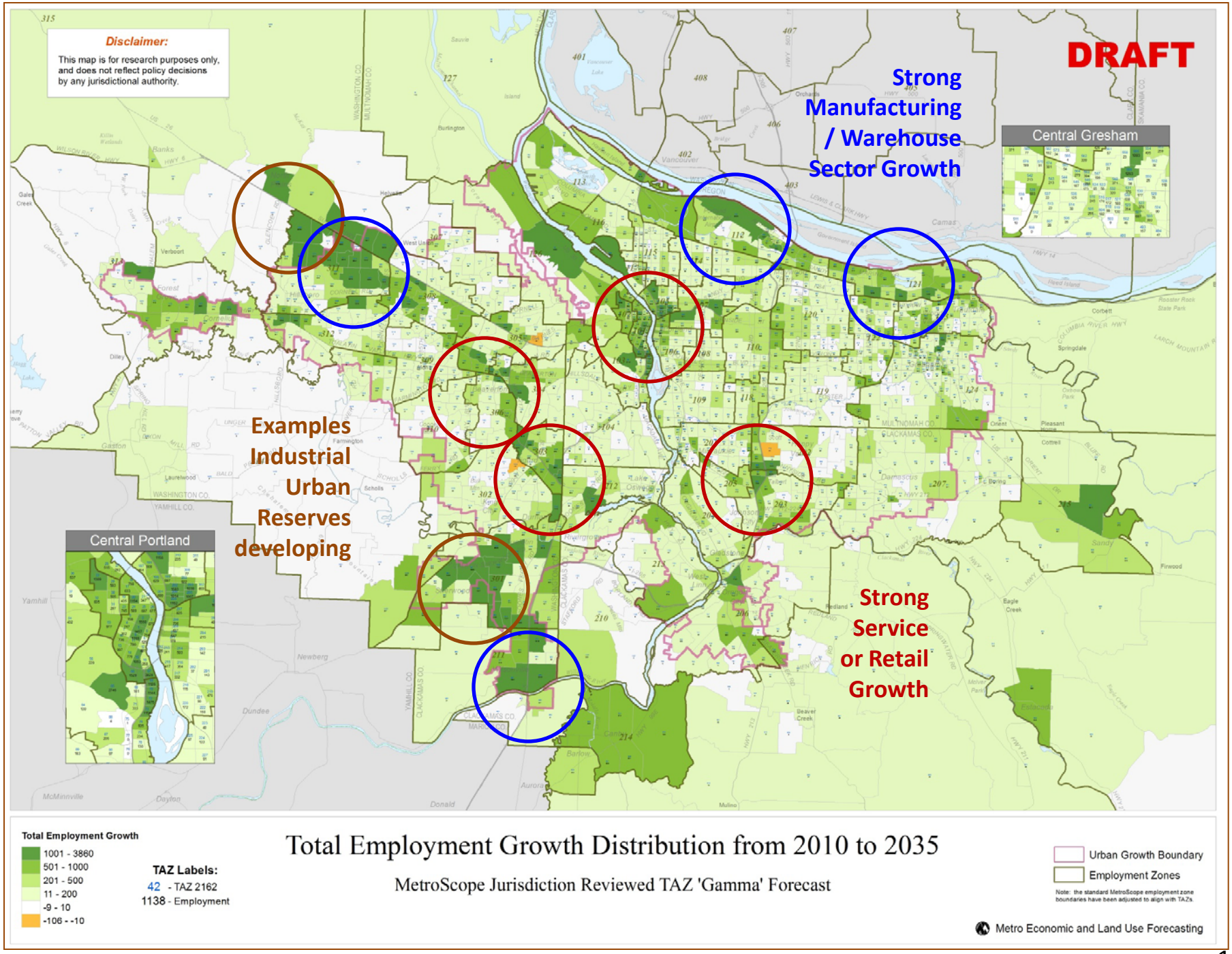
How we see it:

- New single family capacity is used at the edge
- Existing single-family is retained
- Significant multi-family occurs in centers and corridors.

Growth distribution and land consumption

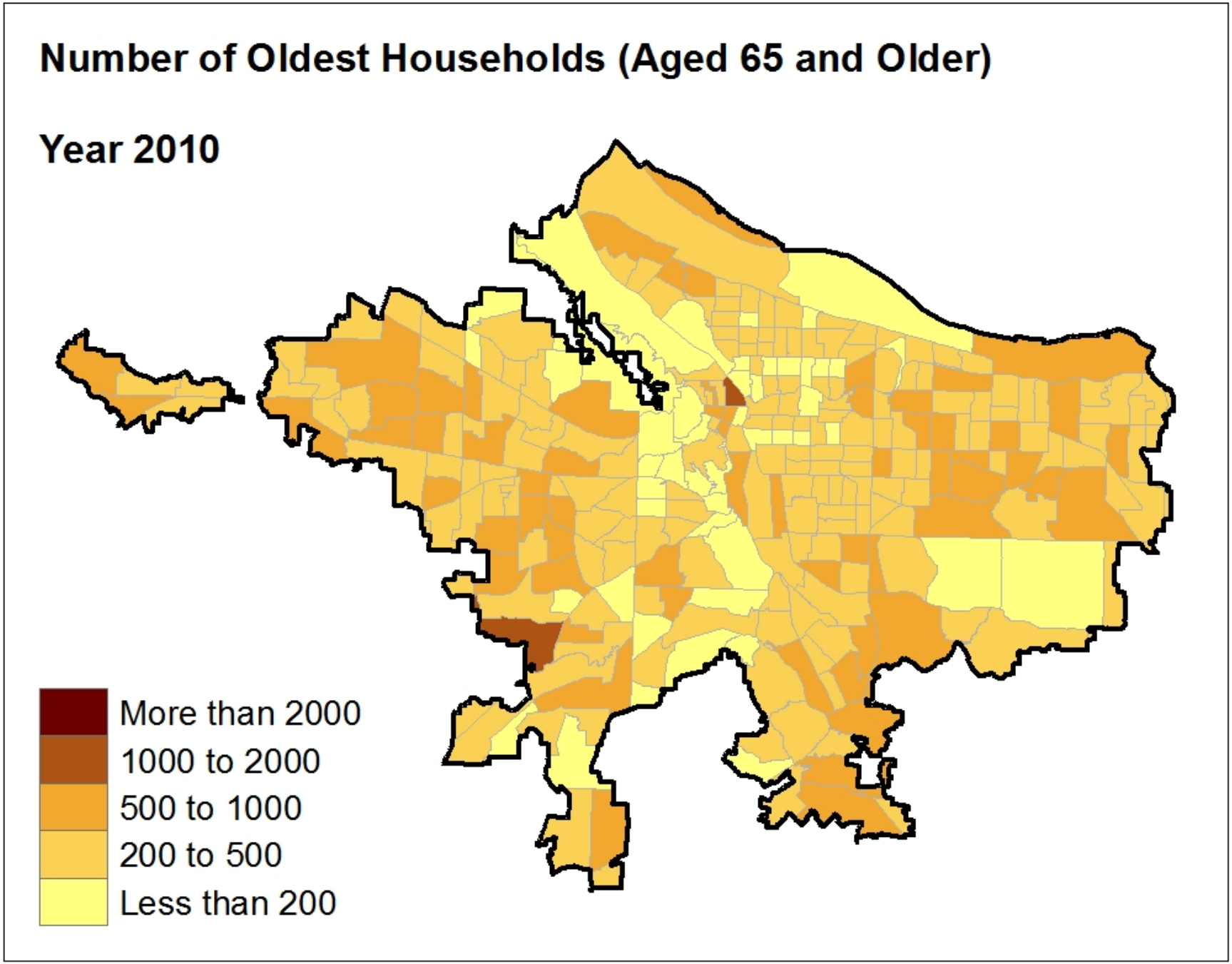


= 40% more households in 10% more area


Disclaimer:
This map is for research purposes only, and does not reflect policy decisions by any jurisdictional authority.
DRAFT
Strong Manufacturing / Warehouse Sector Growth
Central Gresham
Examples Industrial Urban Reserves developing
Central Portland
Strong Service or Retail Growth
Total Employment Growth
1001 - 3860
501 - 1000
201 - 500
11 - 200
-9 - 10
-106 - -10
TAZ Labels:
42 - TAZ 2162
1138 - Employment
Total Employment Growth Distribution from 2010 to 2035
MetroScope Jurisdiction Reviewed TAZ 'Gamma' Forecast
Urban Growth Boundary
Employment Zones
Note: the standard MetroScope employment zone boundaries have been adjusted to align with TAZs.
Metro Economic and Land Use Forecasting

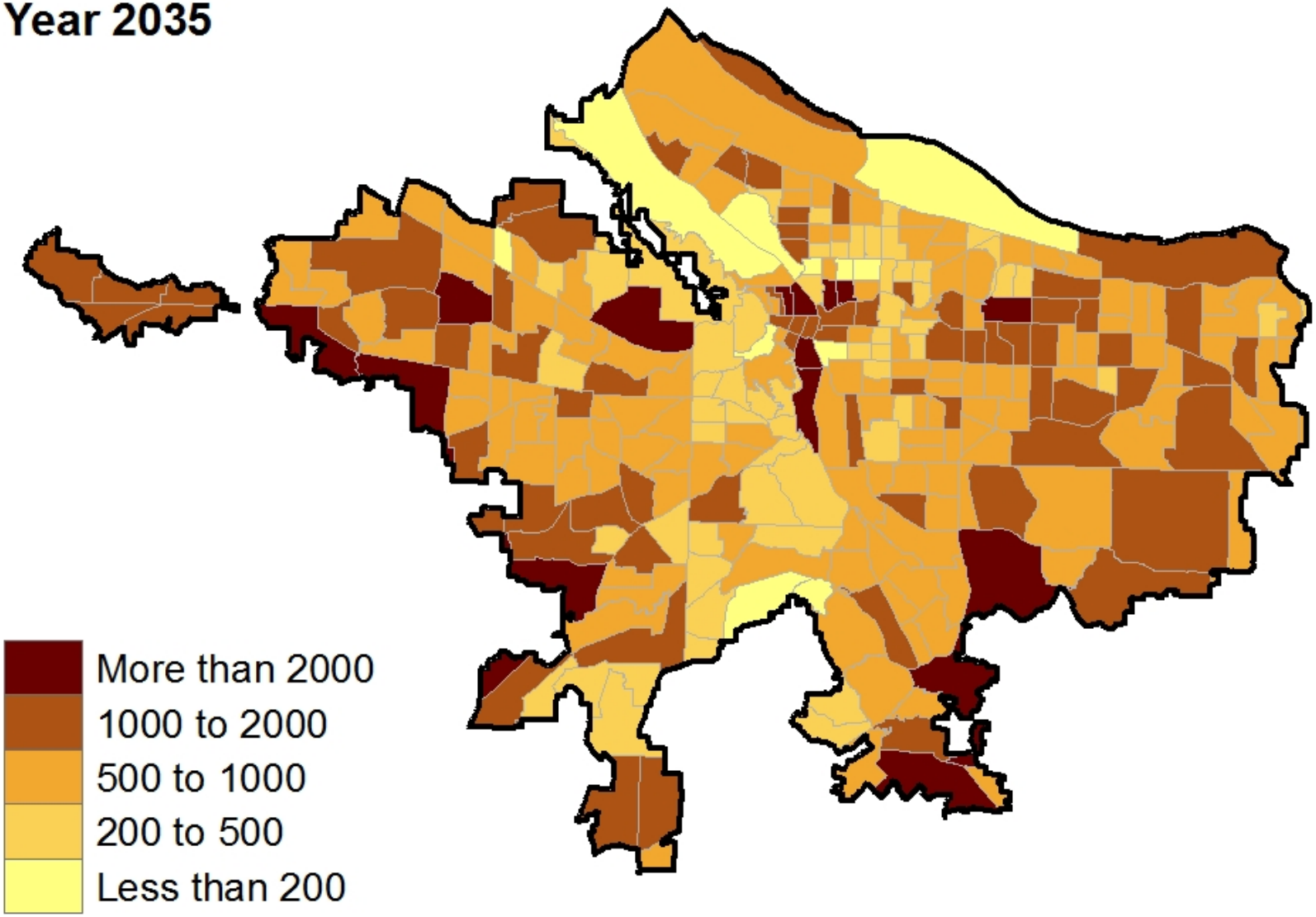
Demographic/Socio-Economic Attributes from Forecast

- Income
- Household size
- Age


Number of Oldest Households (Aged 65 and Older)
Year 2010
More than 2000
1000 to 2000
500 to 1000
200 to 500
Less than 200

Number of Oldest Households (Aged 65 and Older)

Year 2035



Key technical takeaways

Forecast reflects 2040 program objectives

- 32% growth in centers and 17% growth in corridors
- Strong redevelopment and infill (75% refill rate)
- Future residential density rises to 12.3 units per acre
- Growth splits of 60% multi-family and 40% single-family (2010-2035)

Key technical takeaways

Monitoring needs:

- Single-family housing prices 2030 to 2035
- Capture rate for single-family housing within UGB
- Commute patterns: distribution “tails” for long distance commuters begin to rise

40% increase in UGB population and 10% land absorption (2010-2035)

Proposed research

Proposed improvements to the forecast distribution process:

- Residential choice study enhanced with market segmentation
- Redevelopment supply assumption refinement
- Other?

Conclusions

Results: The 2010 to 2035 Growth Distribution closely matches the 2040 Plan.

Process: The Growth Distribution process fully reflects local jurisdiction review and capacity for land use/comprehensive plan, redevelopment and infill capacity.

Next: This Growth Distribution identifies opportunities, challenges and research needs to better monitor growth over time and to enhance Metro's UGR & future Growth Distributions.

Questions

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