

CLACKAMAS COUNTY BOARD OF COUNTY COMMISSIONERS

Staff Presentation Worksheet

Presentation Date: October 30, 2012 Time: 1:30 PM Length: 30 minutes

Presentation Title: 2035 Regional Forecast Briefing

Department: Transportation and Development (DTD)

Presenters: Cam Gilmour, Director, DTD

Larry Conrad, Principal Transportation Planner, Transportation Planning
Division

POLICY QUESTION

None; information only.

ISSUE & BACKGROUND

Oregon land use law (ORS 195.036; 195.025) requires Metro to develop a coordinated regional population forecast for the area inside the Portland Metropolitan urban growth boundary. The County is required to use this forecast as the basis for updates to the County's Comprehensive Plan and Transportation System Plan. Through cooperative work with the counties and other local jurisdictions, Metro has generated a 2035 Regional Forecast, which they will be proposing for adoption.

Over the last two years, Clackamas County staff has been involved in revising the regional urban land supply model used in the forecasting process. In addition, County staff helped coordinate the allocation of the 2035 Regional Forecast to individual Traffic Analysis Zones (TAZ) so that it can be used by local governments in their planning work. County staff continues to work with Metro on some areas where the existing model could be improved for subsequent forecasts.

The following tables provide an overview of the changes between the 2030 forecast, completed in 2006 and the 2035 forecast that is currently scheduled for adoption. The household portion of the 2035 forecast is largely driven by the regional supply of land model. The 2035 forecast differs from the 2030 forecast as follows:

- Four-county regional household forecast increases slightly (+ 3%)
- Clackamas County household forecast decreases (- 13%)

Household Forecast	Last Reviewed Forecast - 2030	Current Forecast - 2035
Multnomah County	372,913	442,546
Washington County	272,998	289,592
Clark County	246,850	228,392
Clackamas County	241,821	208,437
Four-County Total	1,134,582	1,168,967

The employment forecast is primarily based on the forecast growth in specific economic sectors, the current location of that employment and where housing growth is occurring. The 2035 forecast differs from the 2030 forecast as follows:

- Four-county regional employment forecast decreases (- 15%)
- Clackamas County employment forecast decreases (- 16%)

Employment Forecast	Last Reviewed Forecast - 2030	Current Forecast - 2035
Multnomah County	705,721	597,331
Washington County	450,970	382,812
Clark County	264,430	222,020
Clackamas County	251,286	210,444
Four-County Totals	1,672,407	1,412,607

Metro staff is presenting the 2035 Regional Forecast to its committees on the following dates:

- Metro Technical Advisory Committee --- October 17
- Metro Council – first reading of the ordinance --- October 18
- Metro Policy Advisory Committee (MPAC) --- October 24
- Transportation Policy Alternatives Committee --- October 26
- Joint Policy Advisory Committee on Transportation --- November 8
- Metro Council – second reading, public hearing and vote --- November 29

For the first time, the regional forecast is being adopted as an ordinance, so once it is adopted it will be forwarded to the Land Conservation and Development Commission (LCDC) for review.

Clackamas County will use the 2035 Regional Forecast as part of the Transportation System Plan update, currently scheduled to be completed by the end of 2013. The County will also use this forecast as the basis for completing 20-year coordinated population forecasts for its cities *outside* the Portland Metropolitan urban growth boundary, as required by ORS 195.036 and 195.025.

QUESTION(S) PRESENTED FOR CONSIDERATION

None.

OPTIONS AVAILABLE

n/a

RECOMMENDATIONS


None

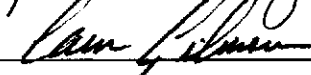
SUBMITTED BY:

Division Director/Head Approval

Department Director/Head Approval

County Administrator Approval





For information on this issue or copies of attachments, please contact Larry Conrad @ 503-742-4539 or larryc@clackamas.us

Metro 2035 Regional Forecast – Additional Background Information

October 30, 2012

2035 Forecast

Under state law, Metro is responsible for developing a coordinated population (households) and employment forecast for the area within its boundary. As the lead Metropolitan Planning Organization (MPO) for the larger seven-county planning area, Metro has an additional responsibility to develop county-wide forecasts for this larger area. Both of these forecasts are updated approximately every five years. As a result of this dual set of responsibilities, the 2035 Metro forecast covers all of Clackamas County.

Under the provisions of the Regional Transportation Functional Plan, adopted in 2010, Clackamas County is required to use the Metro forecast of households and employment for any land use or transportation planning work undertaken within the Metro boundary and the regional urban growth boundary (UGB).

Outside the regional UGB, the County is responsible, under state law, for coordinating population forecasts with its rural cities (Barlow, Canby, Estacada, Molalla and Sandy). County staff has decided to use the Metro forecasts as the basis for these coordinated forecasts and is presently working with city staff to finalize the projections for each rural city.

Factors that Shaped the 2035 Forecasts

There are a number of factors that shaped the 2035 Forecast. Metro and local government staff worked to improve the urban land supply model used during the latest forecasting process. While it is vastly improved, the land supply model still may need some additional work in the rural portions of Clackamas County for future iterations of this forecast. There is also room for improvement in some portions of the forecast process, which will be noted below.

Urban Reserves and Assumed Addition to the Regional Land Supply

The creation of the urban reserves has produced a significant change in the location of forecast growth between the 2030 forecast and the 2035 forecast. This is partially the result of more opportunities for growth in the west side of the region. Washington County undertook initial planning work in most of their urban reserves and recommended a schedule for the addition of these reserves to the regional land supply that was accepted by the Metro staff and made part of the forecast assumptions.

Because Clackamas County's largest urban reserves, the Stafford area, does not have the same level of planning and is the subject of a local challenge, Metro staff chose to assume that the area would not be part of the urban land supply until after 2040. While this assumption is a forecasting decision and not a land use decision, it does impact the County planning for the Transportation System Plan update, which will need to assume that the Stafford area remains rural for the duration of the TSP planning period.

Multifamily Housing Forecast

The regional multifamily household forecast may be over-allocating multifamily growth to Multnomah County, specifically the City of Portland, and under-allocating multifamily growth in Clackamas County. The multifamily portion of the model favors allocations to urban areas with transit, job growth and urban amenities, which is why Multnomah County attracts such a large portion of this housing market. At the other end of this allocation process, the City of Damascus is forecast to have growth that is almost entirely single-family households.

Clackamas County staff is not certain this portion of the model allocation process is performing reasonably. Additional research and refinement of the model appears to be called for to address this issue.

Rural Area Growth Forecast

The 2035 forecast has raised concerns in another area. The 2035 Household Forecast includes substantial growth in rural cities because the single-family land supply inside the Metro boundary is almost entirely consumed during the forecast period. The rural cities, with the exception of Molalla, have sufficient available land supply to accommodate this growth.

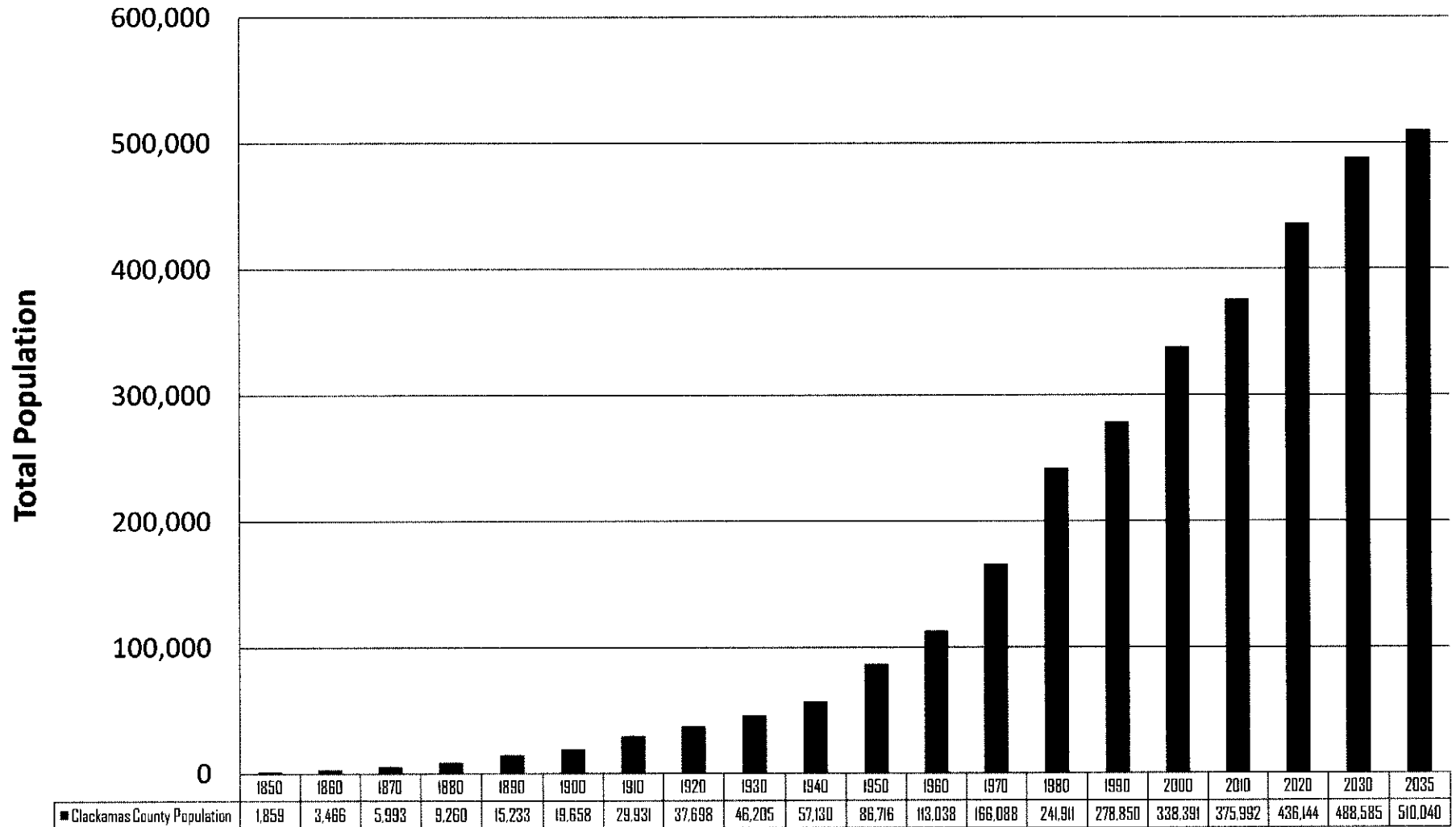
However, the 2035 household forecast also assumes that approximately 17,000 new single-family homes will be developed on rural land outside of the rural cities' urban growth boundaries. This is a substantially greater amount of growth in rural area than has been estimated by any previous County study. Clackamas County and its rural cities are currently involved in a process, described below, that should provide an opportunity to reallocate some of this growth to areas inside the UGBs of the rural cities.

County Rural Population Coordination Process

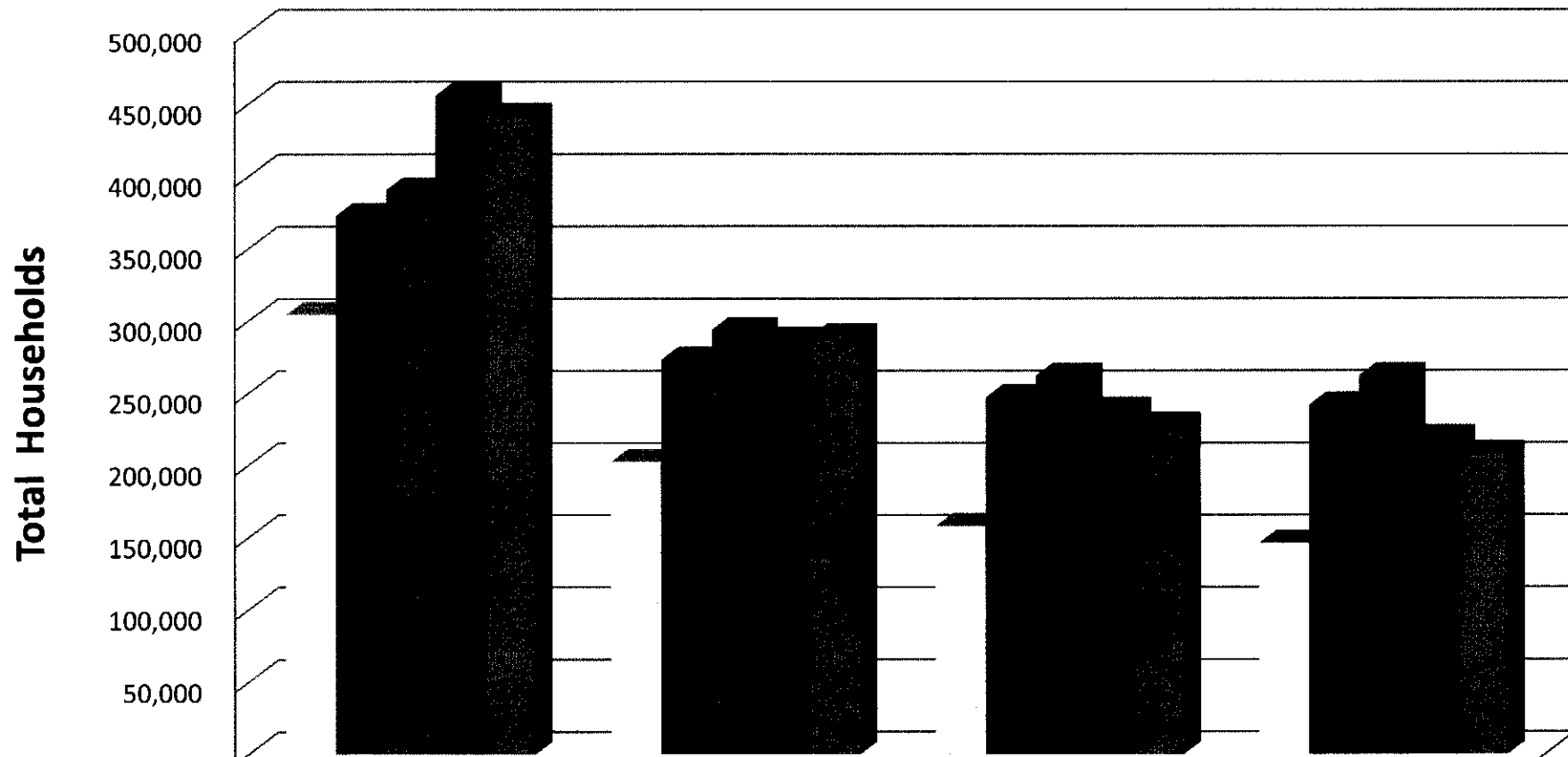
Clackamas County has received a grant from LCDC to undertake a population coordination process with the five rural cities - Barlow, Canby, Estacada, Molalla and Sandy. Planning and Zoning Division staff, who are leading this effort, will use the Metro rural forecast as a set of control totals for household and employment growth in the rural areas. When the process is complete, the County will provide a revised set of Traffic Analysis Zones (TAZ) level forecast to Metro for inclusion in the Regional Model.

Clackamas County - Historic and Estimated Population

Source: US Census, Metro - Gamma Forecast, Clackamas County



Existing Households and Last Four Forecasts



	Multnomah County	Washington County	Clark County	Clackamas County
Existing - 2010	304,649	202,647	158,110	146,324
■ Gen 2.3 - 2006	372,913	272,998	246,850	241,821
■ FC RTP - 2009	390,690	293,847	262,048	262,101
■ Beta - 2011	455,905	286,941	238,417	219,148
■ Gamma - 2012	442,546	289,592	228,392	208,437

METRO 'GAMMA' FORECAST DISTRIBUTION PROFILES BY COUNTY AND CITY

JURISDICTION REVIEWED HOUSEHOLDS AND EMPLOYMENT

Published 9/19/2012 Metro Economic and Land Use Forecasting



Metro

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METRO TAZ 'GAMMA' FORECAST -- JURISDICTION PROFILES

Published 9/19/2012 Metro Economic and Land Use Forecasting

County Summary for Clackamas

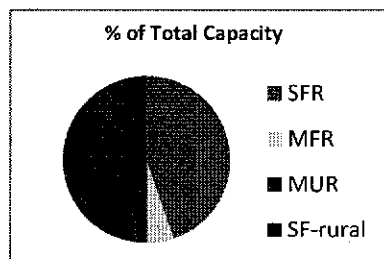
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Household Forecast				
Year	SF	MF	Total	%APR
2010	109,231	37,093	146,324	
2025	146,808	41,341	188,149	1.7%
2035	161,217	47,220	208,437	1.0%
2040	167,598	51,814	219,412	1.0%

Households Change from 2010			
Year	SF	MF	Total
2025	37,577	4,248	41,825
2035	51,986	10,127	62,113
2040	58,367	14,721	73,088

2010-2045 Capacity Used			
Year	SF	MF	Total
2025	49%	5%	27%
2035	68%	13%	40%
2040	76%	19%	47%

2010-2045 Household Capacity by Type							
	SFR	MFR	MUR	SF-rural	All SF	All MF	Total
Capacity	69,435	8,172	70,254	7,446	76,881	78,426	155,307
% of Total	45%	5%	45%	5%	50%	50%	100%



SFR = Single Family Residential
MFR = Multi-Family Residential
MUR = Multi-Family, Mixed Use
SF-rural = Rural Single Family

SF = SFR + SF-rural
MF = MFR + MUR

Employment Forecast				
Year	Retail	Service	Other	Total
2010	27,114	40,035	70,797	137,946
2025	34,770	62,517	85,943	183,230
2035	39,943	77,957	92,544	210,444
2040	43,177	85,402	98,874	227,453

2010-2045 Employment Cap.		
	IND	COM
Acres	3,819	2,255
% of Total	63%	37%

DISCLAIMER: These data are for research purposes only, and do not reflect policy decisions by any jurisdictional authority.

METRO TAZ 'GAMMA' FORECAST -- JURISDICTION PROFILES

Published 9/19/2012 Metro Economic and Land Use Forecasting

City **Canby**

County **Clackamas**

Note: City geographies are approximated by TAZ boundaries.

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Household Forecast

Year	SF	MF	Total	%APR
2010	5,115	1,513	6,628	
2025	9,069	1,593	10,662	3.2%
2035	9,796	1,783	11,579	0.8%
2040	9,816	1,895	11,712	0.2%

Households Change from 2010

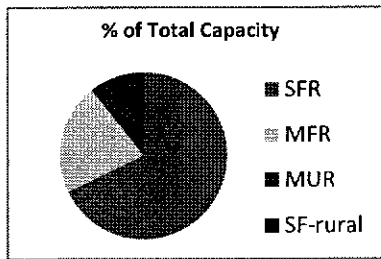
Year	SF	MF	Total
2025	3,954	80	4,034
2035	4,681	270	4,951
2040	4,701	382	5,084

2010-2045 Capacity Used

Year	SF	MF	Total
2025	87%	4%	62%
2035	100%	14%	76%
2040	100%	19%	78%

2010-2045 Household Capacity by Type

	SFR	MFR	MUR	SF-rural	All SF	All MF	Total
Capacity	4,442	1,400	600	99	4,541	2,000	6,541
% of Total	68%	21%	9%	2%	69%	31%	100%



SFR = Single Family Residential
MFR = Multi-Family Residential
MUR = Multi-Family, Mixed Use
SF-rural = Rural Single Family

SF = SFR + SF-rural
MF = MFR + MUR

Employment Forecast

Year	Retail	Service	Other	Total
2010	1,127	1,012	3,453	5,592
2025	1,227	1,356	3,560	6,143
2035	1,929	2,110	5,043	9,082
2040	2,218	2,461	5,519	10,198

2010-2045 Employment Cap.

	IND	COM
Acres	200	104
% of Total	66%	34%

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METRO TAZ 'GAMMA' FORECAST -- JURISDICTION PROFILES

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City **Damascus**

County **Clackamas**

Note: City geographies are approximated by TAZ boundaries.

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Household Forecast

Year	SF	MF	Total	%APR
2010	3,322	205	3,527	
2025	9,087	164	9,251	6.6%
2035	11,700	217	11,916	2.6%
2040	12,969	280	13,249	2.1%

Households Change from 2010

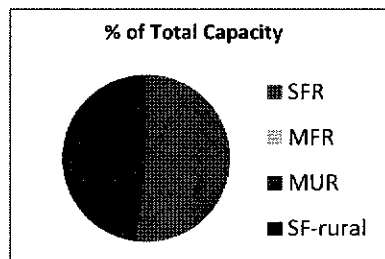
Year	SF	MF	Total
2025	5,765	-41	5,724
2035	8,378	12	8,389
2040	9,647	75	9,722

2010-2045 Capacity Used

Year	SF	MF	Total
2025	52%	0%	27%
2035	75%	0%	39%
2040	86%	1%	45%

2010-2045 Household Capacity by Type

	SFR	MFR	MUR	SF-rural	All SF	All MF	Total
Capacity	11,185	12	10,351	1	11,187	10,363	21,550
% of Total	52%	0%	48%	0%	52%	48%	100%



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MFR = Multi-Family Residential
MUR = Multi-Family, Mixed Use
SF-rural = Rural Single Family

SF = SFR + SF-rural
MF = MFR + MUR

Employment Forecast

Year	Retail	Service	Other	Total
2010	260	357	908	1,525
2025	510	822	1,418	2,750
2035	902	1,613	1,894	4,409
2040	1,378	2,252	3,107	6,737

2010-2045 Employment Cap.

	IND	COM
Acres	597	366
% of Total	62%	38%

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METRO TAZ 'GAMMA' FORECAST -- JURISDICTION PROFILES

Published 9/19/2012 Metro Economic and Land Use Forecasting

City **Estacada**

County **Clackamas**

Note: City geographies are approximated by TAZ boundaries.

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Household Forecast

Year	SF	MF	Total	%APR
2010	1,343	315	1,658	
2025	1,832	330	2,162	1.8%
2035	2,258	324	2,582	1.8%
2040	2,350	350	2,700	0.9%

Households Change from 2010

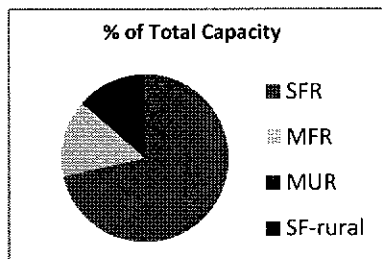
Year	SF	MF	Total
2025	489	15	504
2035	915	9	924
2040	1,007	35	1,042

2010-2045 Capacity Used

Year	SF	MF	Total
2025	42%	8%	37%
2035	79%	4%	68%
2040	87%	18%	77%

2010-2045 Household Capacity by Type

	SFR	MFR	MUR	SF-rural	All SF	All MF	Total
Capacity	968	200	0	184	1,152	200	1,352
% of Total	72%	15%	0%	14%	85%	15%	100%



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MFR = Multi-Family Residential
MUR = Multi-Family, Mixed Use
SF-rural = Rural Single Family

SF = SFR + SF-rural
MF = MFR + MUR

Employment Forecast

Year	Retail	Service	Other	Total
2010	290	284	853	1,427
2025	541	664	1,365	2,570
2035	696	901	1,514	3,111
2040	772	1,008	1,574	3,354

2010-2045 Employment Cap.

	IND	COM
Acres	25	89
% of Total	22%	78%

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METRO TAZ 'GAMMA' FORECAST -- JURISDICTION PROFILES

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City **Gladstone**

County **Clackamas**

Note: City geographies are approximated by TAZ boundaries.

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Household Forecast

Year	SF	MF	Total	%APR
2010	2,831	1,356	4,187	
2025	3,094	1,469	4,563	0.6%
2035	3,097	1,779	4,876	0.7%
2040	3,100	1,930	5,030	0.6%

Households Change from 2010

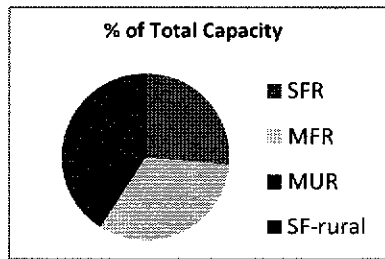
Year	SF	MF	Total
2025	263	113	376
2035	266	423	689
2040	269	574	843

2010-2045 Capacity Used

Year	SF	MF	Total
2025	95%	15%	36%
2035	96%	55%	65%
2040	97%	74%	80%

2010-2045 Household Capacity by Type

	SFR	MFR	MUR	SF-rural	All SF	All MF	Total
Capacity	277	346	430	0	277	776	1,052
% of Total	26%	33%	41%	0%	26%	74%	100%



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MFR = Multi-Family Residential
MUR = Multi-Family, Mixed Use
SF-rural = Rural Single Family

SF = SFR + SF-rural
MF = MFR + MUR

Employment Forecast

Year	Retail	Service	Other	Total
2010	702	546	883	2,131
2025	835	854	1,032	2,721
2035	903	1,040	1,092	3,035
2040	927	1,119	1,134	3,180

2010-2045 Employment Cap.

	IND	COM
Acres	3	20
% of Total	15%	85%

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METRO TAZ 'GAMMA' FORECAST -- JURISDICTION PROFILES

Published 9/19/2012 Metro Economic and Land Use Forecasting

City **Happy Valley**

County **Clackamas**

Note: City geographies are approximated by TAZ boundaries.

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Household Forecast

Year	SF	MF	Total	%APR
2010	4,162	273	4,435	
2025	9,498	400	9,898	5.5%
2035	9,898	512	10,410	0.5%
2040	9,894	583	10,477	0.1%

Households Change from 2010

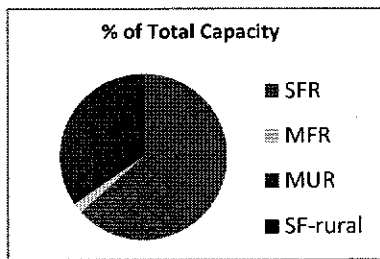
Year	SF	MF	Total
2025	5,336	127	5,463
2035	5,736	239	5,975
2040	5,732	310	6,042

2010-2045 Capacity Used

Year	SF	MF	Total
2025	100%	4%	68%
2035	100%	8%	74%
2040	100%	11%	75%

2010-2045 Household Capacity by Type

	SFR	MFR	MUR	SF-rural	All SF	All MF	Total
Capacity	5,120	156	2,787	0	5,120	2,944	8,064
% of Total	63%	2%	35%	0%	63%	37%	100%



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MFR = Multi-Family Residential
MUR = Multi-Family, Mixed Use
SF-rural = Rural Single Family

SF = SFR + SF-rural
MF = MFR + MUR

Employment Forecast

Year	Retail	Service	Other	Total
2010	241	256	621	1,118
2025	614	1,266	1,351	3,231
2035	789	1,842	1,616	4,247
2040	918	2,164	1,982	5,064

2010-2045 Employment Cap.

	IND	COM
Acres	228	132
% of Total	63%	37%

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METRO TAZ 'GAMMA' FORECAST -- JURISDICTION PROFILES

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City **Lake Oswego**

County **Clackamas**

Note: City geographies are approximated by TAZ boundaries.

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Household Forecast

Year	SF	MF	Total	%APR
2010	10,887	5,180	16,067	
2025	12,215	6,117	18,332	0.9%
2035	12,307	6,984	19,291	0.5%
2040	12,888	7,586	20,474	1.2%

Households Change from 2010

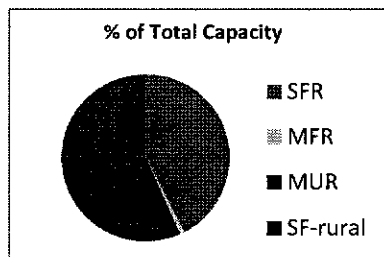
Year	SF	MF	Total
2025	1,328	937	2,265
2035	1,420	1,804	3,224
2040	2,001	2,406	4,407

2010-2045 Capacity Used

Year	SF	MF	Total
2025	74%	39%	54%
2035	80%	74%	77%
2040	100%	99%	100%

2010-2045 Household Capacity by Type

	SFR	MFR	MUR	SF-rural	All SF	All MF	Total
Capacity	1,785	37	2,391	0	1,785	2,428	4,213
% of Total	42%	1%	57%	0%	42%	58%	100%



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MFR = Multi-Family Residential
MUR = Multi-Family, Mixed Use
SF-rural = Rural Single Family

SF = SFR + SF-rural
MF = MFR + MUR

Employment Forecast

Year	Retail	Service	Other	Total
2010	2,553	7,024	8,670	18,247
2025	2,285	11,188	8,822	22,295
2035	2,323	11,584	8,879	22,786
2040	2,260	12,388	9,191	23,839

2010-2045 Employment Cap.

	IND	COM
Acres	19	198
% of Total	9%	91%

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METRO TAZ 'GAMMA' FORECAST -- JURISDICTION PROFILES

Published 9/19/2012 Metro Economic and Land Use Forecasting

City **Milwaukie**

County **Clackamas**

Note: City geographies are approximated by TAZ boundaries.

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Household Forecast

Year	SF	MF	Total	%APR
2010	5,934	2,307	8,241	
2025	6,934	2,426	9,360	0.9%
2035	7,166	2,574	9,740	0.4%
2040	7,178	2,624	9,802	0.1%

Households Change from 2010

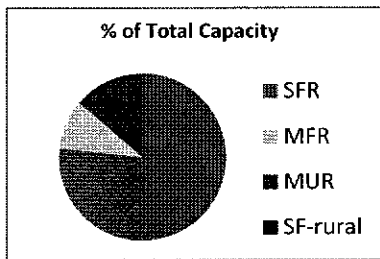
Year	SF	MF	Total
2025	1,000	119	1,119
2035	1,232	267	1,499
2040	1,244	317	1,561

2010-2045 Capacity Used

Year	SF	MF	Total
2025	76%	30%	65%
2035	93%	67%	87%
2040	94%	79%	91%

2010-2045 Household Capacity by Type

	SFR	MFR	MUR	SF-rural	All SF	All MF	Total
Capacity	1,320	164	235	0	1,320	399	1,719
% of Total	77%	10%	14%	0%	77%	23%	100%



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 MFR = Multi-Family Residential
 MUR = Multi-Family, Mixed Use
 SF-rural = Rural Single Family

SF = SFR + SF-rural
 MF = MFR + MUR

Employment Forecast

Year	Retail	Service	Other	Total
2010	1,403	3,527	6,658	11,588
2025	1,737	4,860	7,538	14,135
2035	1,944	5,751	7,712	15,407
2040	2,031	6,096	7,728	15,855

2010-2045 Employment Cap.

	IND	COM
Acres	44	26
% of Total	63%	37%

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METRO TAZ 'GAMMA' FORECAST -- JURISDICTION PROFILES

Published 9/19/2012 Metro Economic and Land Use Forecasting

City **Molalla**

County **Clackamas**

Note: City geographies are approximated by TAZ boundaries.

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Household Forecast

Year	SF	MF	Total	%APR
2010	3,539	204	3,743	
2025	4,145	238	4,383	1.1%
2035	5,020	239	5,259	1.8%
2040	5,236	242	5,477	0.8%

Households Change from 2010

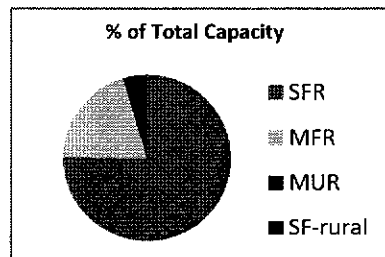
Year	SF	MF	Total
2025	606	34	640
2035	1,481	35	1,516
2040	1,697	38	1,734

2010-2045 Capacity Used

Year	SF	MF	Total
2025	30%	7%	26%
2035	74%	7%	61%
2040	85%	8%	70%

2010-2045 Household Capacity by Type

	SFR	MFR	MUR	SF-rural	All SF	All MF	Total
Capacity	1,875	500	0	118	1,992	500	2,492
% of Total	75%	20%	0%	5%	80%	20%	100%



SFR = Single Family Residential
MFR = Multi-Family Residential
MUR = Multi-Family, Mixed Use
SF-rural = Rural Single Family

SF = SFR + SF-rural
MF = MFR + MUR

Employment Forecast

Year	Retail	Service	Other	Total
2010	639	416	1,628	2,683
2025	926	891	2,253	4,070
2035	1,118	1,216	2,515	4,849
2040	1,234	1,413	2,734	5,381

2010-2045 Employment Cap.

	IND	COM
Acres	25	90
% of Total	22%	78%

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METRO TAZ 'GAMMA' FORECAST -- JURISDICTION PROFILES

Published 9/19/2012 Metro Economic and Land Use Forecasting

City **Oregon City**

County **Clackamas**

Note: City geographies are approximated by TAZ boundaries.

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Household Forecast

Year	SF	MF	Total	%APR
2010	8,463	3,511	11,974	
2025	11,378	4,136	15,514	1.7%
2035	12,186	4,861	17,047	0.9%
2040	12,192	5,340	17,533	0.6%

Households Change from 2010

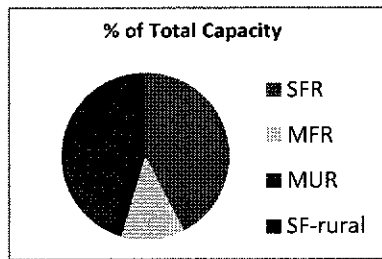
Year	SF	MF	Total
2025	2,915	625	3,540
2035	3,723	1,350	5,073
2040	3,729	1,829	5,559

2010-2045 Capacity Used

Year	SF	MF	Total
2025	91%	14%	47%
2035	100%	31%	67%
2040	100%	42%	74%

2010-2045 Household Capacity by Type

	SFR	MFR	MUR	SF-rural	All SF	All MF	Total
Capacity	3,187	921	3,410	4	3,191	4,331	7,522
% of Total	42%	12%	45%	0%	42%	58%	100%



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Employment Forecast

Year	Retail	Service	Other	Total
2010	3,081	3,727	7,580	14,388
2025	4,584	5,657	9,246	19,487
2035	5,418	6,990	10,077	22,485
2040	5,754	7,481	10,429	23,664

2010-2045 Employment Cap.

	IND	COM
Acres	86	189
% of Total	31%	69%

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METRO TAZ 'GAMMA' FORECAST -- JURISDICTION PROFILES

Published 9/19/2012 Metro Economic and Land Use Forecasting

City **Sandy**

County **Clackamas**

Note: City geographies are approximated by TAZ boundaries.

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Household Forecast

Year	SF	MF	Total	%APR
2010	3,809	516	4,325	
2025	5,138	553	5,691	1.8%
2035	6,954	681	7,635	3.0%
2040	8,748	746	9,494	4.5%

Households Change from 2010

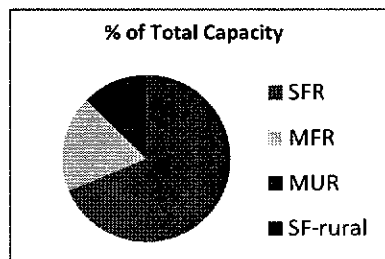
Year	SF	MF	Total
2025	1,329	37	1,366
2035	3,145	165	3,310
2040	4,939	230	5,169

2010-2045 Capacity Used

Year	SF	MF	Total
2025	29%	2%	21%
2035	68%	9%	52%
2040	100%	13%	81%

2010-2045 Household Capacity by Type

	SFR	MFR	MUR	SF-rural	All SF	All MF	Total
Capacity	4,399	1,180	600	213	4,612	1,780	6,392
% of Total	69%	18%	9%	3%	72%	28%	100%



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Employment Forecast

Year	Retail	Service	Other	Total
2010	1,195	684	1,302	3,181
2025	1,846	1,438	2,210	5,494
2035	2,194	1,907	2,530	6,631
2040	2,631	2,348	3,175	8,154

2010-2045 Employment Cap.

	IND	COM
Acres	83	285
% of Total	23%	77%

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METRO TAZ 'GAMMA' FORECAST -- JURISDICTION PROFILES

Published 9/19/2012 Metro Economic and Land Use Forecasting

City **Tualatin**

County **Washington**

Note: City geographies are approximated by TAZ boundaries.

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Household Forecast

Year	SF	MF	Total	%APR
2010	5,391	4,847	10,238	
2025	5,919	5,100	11,019	0.5%
2035	5,980	5,190	11,170	0.1%
2040	6,078	5,215	11,293	0.2%

Households Change from 2010

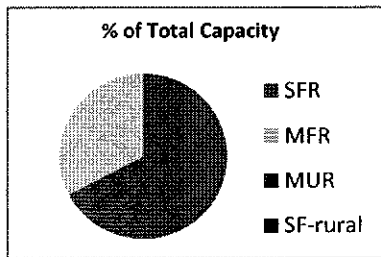
Year	SF	MF	Total
2025	528	253	781
2035	589	343	932
2040	687	368	1,055

2010-2045 Capacity Used

Year	SF	MF	Total
2025	94%	94%	94%
2035	100%	100%	100%
2040	100%	100%	100%

2010-2045 Household Capacity by Type

	SFR	MFR	MUR	SF-rural	All SF	All MF	Total
Capacity	559	269	0	0	559	269	828
% of Total	67%	33%	0%	0%	67%	33%	100%



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Employment Forecast

Year	Retail	Service	Other	Total
2010	4,372	6,140	12,460	22,972
2025	4,773	7,879	18,449	31,101
2035	5,066	8,868	21,305	35,239
2040	5,405	9,412	22,777	37,594

2010-2045 Employment Cap.

	IND	COM
Acres	434	26
% of Total	94%	6%

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METRO TAZ 'GAMMA' FORECAST -- JURISDICTION PROFILES

Published 9/19/2012 Metro Economic and Land Use Forecasting

City **Unincorporated Clackamas County**

County **Clackamas**

Note: City geographies are approximated by TAZ boundaries.

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Household Forecast

Year	SF	MF	Total	%APR
2010	48,440	15,213	63,653	
2025	59,480	16,364	75,844	1.2%
2035	65,580	19,224	84,803	1.1%
2040	67,498	21,884	89,382	1.1%

Households Change from 2010

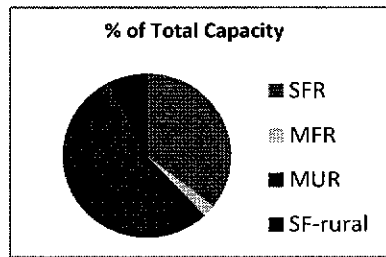
Year	SF	MF	Total
2025	11,040	1,151	12,191
2035	17,140	4,011	21,150
2040	19,058	6,671	25,729

2010-2045 Capacity Used

Year	SF	MF	Total
2025	29%	2%	14%
2035	45%	8%	24%
2040	50%	13%	29%

2010-2045 Household Capacity by Type

	SFR	MFR	MUR	SF-rural	All SF	All MF	Total
Capacity	31,357	2,187	48,018	6,828	38,184	50,205	88,389
% of Total	35%	2%	54%	8%	43%	57%	100%



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SF = SFR + SF-rural
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Employment Forecast

Year	Retail	Service	Other	Total
2010	13,058	16,124	28,456	57,638
2025	16,094	24,302	34,840	75,236
2035	17,764	31,789	36,532	86,085
2040	18,759	34,573	38,566	91,898

2010-2045 Employment Cap.

	IND	COM
Acres	2,258	558
% of Total	80%	20%

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METRO TAZ 'GAMMA' FORECAST -- JURISDICTION PROFILES

Published 9/19/2012 Metro Economic and Land Use Forecasting

City **West Linn**

County **Clackamas**

Note: City geographies are approximated by TAZ boundaries.

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Household Forecast

Year	SF	MF	Total	%APR
2010	7,670	2,582	10,252	
2025	9,030	2,717	11,747	0.9%
2035	9,237	2,751	11,988	0.2%
2040	9,738	2,882	12,620	1.0%

Households Change from 2010

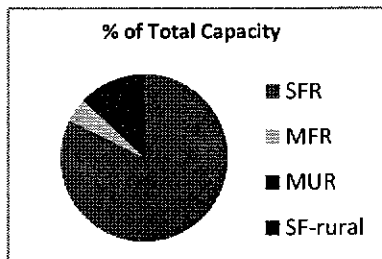
Year	SF	MF	Total
2025	1,360	135	1,495
2035	1,567	169	1,736
2040	2,068	300	2,368

2010-2045 Capacity Used

Year	SF	MF	Total
2025	80%	37%	72%
2035	92%	46%	84%
2040	100%	82%	100%

2010-2045 Household Capacity by Type

	SFR	MFR	MUR	SF-rural	All SF	All MF	Total
Capacity	1,709	95	270	0	1,709	365	2,074
% of Total	82%	5%	13%	0%	82%	18%	100%



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 SF-rural = Rural Single Family

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 MF = MFR + MUR

Employment Forecast

Year	Retail	Service	Other	Total
2010	966	1,593	1,693	4,252
2025	1,381	2,268	2,174	5,823
2035	1,517	2,683	2,331	6,531
2040	1,623	2,835	2,455	6,913

2010-2045 Employment Cap.

	IND	COM
Acres	9	43
% of Total	17%	83%

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METRO TAZ 'GAMMA' FORECAST -- JURISDICTION PROFILES

Published 9/19/2012 Metro Economic and Land Use Forecasting

City **Wilsonville**

County **Clackamas**

Note: City geographies are approximated by TAZ boundaries.

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Household Forecast

Year	SF	MF	Total	%APR
2010	3,471	4,509	7,980	
2025	5,516	5,428	10,944	2.1%
2035	5,625	5,883	11,508	0.5%
2040	5,708	6,058	11,765	0.4%

Households Change from 2010

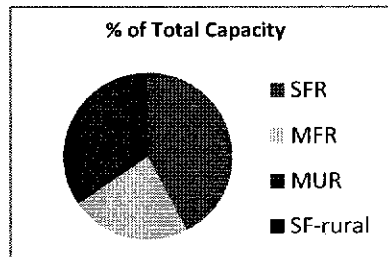
Year	SF	MF	Total
2025	2,045	919	2,964
2035	2,154	1,374	3,528
2040	2,237	1,549	3,785

2010-2045 Capacity Used

Year	SF	MF	Total
2025	100%	38%	70%
2035	100%	57%	84%
2040	100%	64%	90%

2010-2045 Household Capacity by Type

	SFR	MFR	MUR	SF-rural	All SF	All MF	Total
Capacity	1,783	973	1,454	1	1,785	2,427	4,212
% of Total	42%	23%	35%	0%	42%	58%	100%



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MFR = Multi-Family Residential
MUR = Multi-Family, Mixed Use
SF-rural = Rural Single Family

SF = SFR + SF-rural
MF = MFR + MUR

Employment Forecast

Year	Retail	Service	Other	Total
2010	2,480	4,839	9,754	17,073
2025	3,194	7,845	12,939	23,978
2035	3,536	9,733	14,150	27,419
2040	3,853	10,673	14,901	29,427

2010-2045 Employment Cap.

	IND	COM
Acres	316	172
% of Total	65%	35%

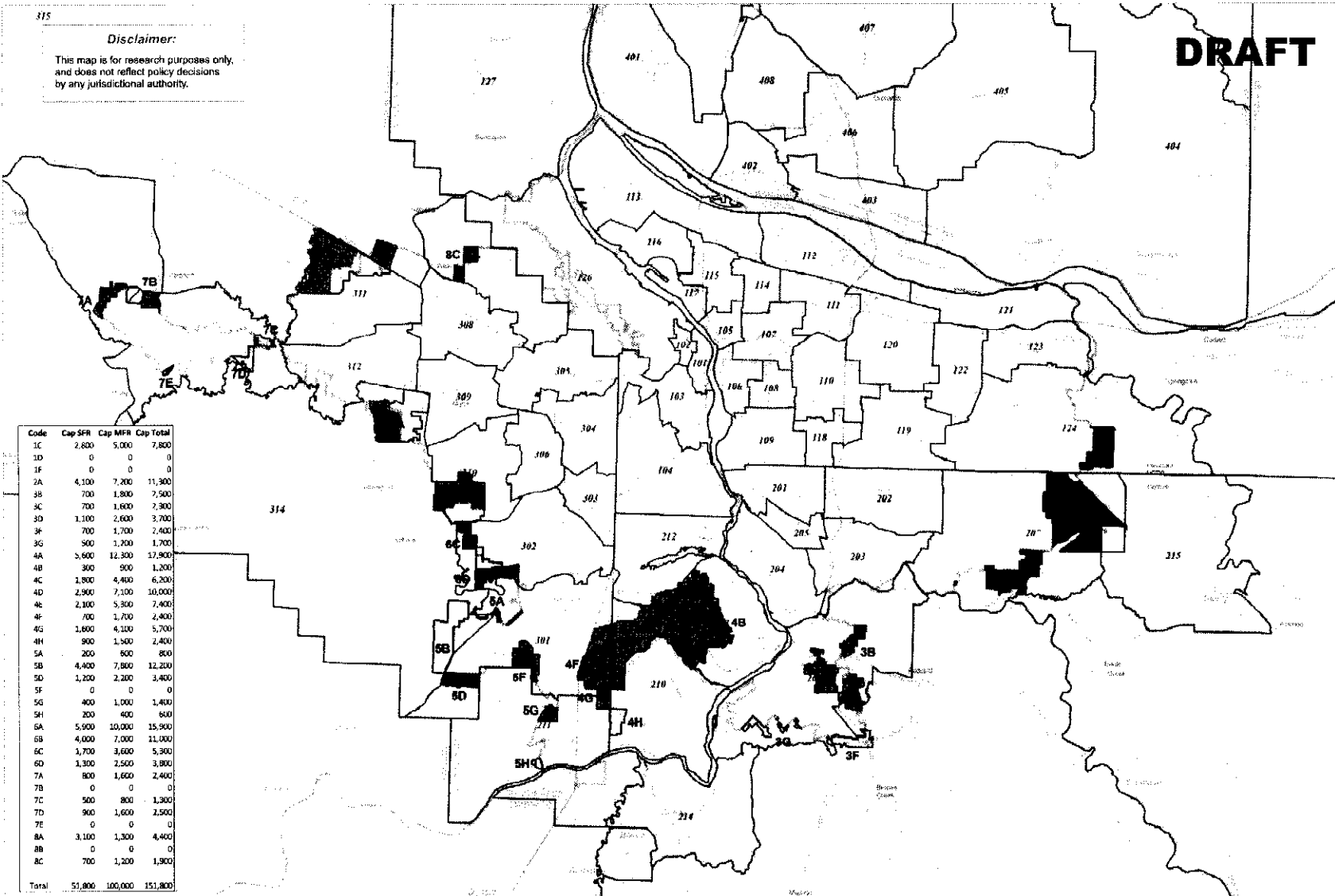
DISCLAIMER:

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Disclaimer:

This map is for research purposes only and does not reflect policy decisions by any jurisdictional authority.

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Code	Cap	SFR	Cap	MFR	Cap	Total
1C	2,800	0	5,000	0	0	7,800
1D	0	0	0	0	0	0
1F	0	0	0	0	0	0
2A	4,100	7,200	7,200	11,300	0	11,300
2B	700	1,800	1,800	2,500	0	2,500
3C	700	1,800	1,800	2,300	0	2,300
3D	1,100	2,600	2,600	3,700	0	3,700
3F	700	1,700	1,700	2,400	0	2,400
3G	900	1,200	1,200	1,700	0	1,700
4A	5,600	12,300	12,300	17,900	0	17,900
4B	300	900	900	1,200	0	1,200
4C	1,800	4,400	4,400	6,200	0	6,200
4D	2,900	7,100	7,100	10,000	0	10,000
4E	2,100	5,300	5,300	7,400	0	7,400
4F	700	1,700	1,700	2,400	0	2,400
4G	1,600	4,100	4,100	5,700	0	5,700
4H	900	1,500	1,500	2,400	0	2,400
5A	200	600	600	800	0	800
5B	4,400	7,800	7,800	12,200	0	12,200
5D	1,200	2,200	2,200	3,400	0	3,400
5F	0	0	0	0	0	0
5G	400	1,000	1,000	1,400	0	1,400
5H	200	400	400	600	0	600
6A	5,900	10,000	10,000	15,900	0	15,900
6B	4,000	7,000	7,000	11,000	0	11,000
6C	1,700	3,600	3,600	5,300	0	5,300
6D	1,300	2,500	2,500	3,800	0	3,800
7A	800	1,600	1,600	2,400	0	2,400
7B	0	0	0	0	0	0
7C	500	800	800	1,300	0	1,300
7D	900	1,600	1,600	2,500	0	2,500
7E	0	0	0	0	0	0
8A	3,100	1,300	1,300	4,400	0	4,400
8B	0	0	0	0	0	0
8C	700	1,200	1,200	1,900	0	1,900
Total	51,800	100,000	100,000	151,800	0	151,800

Infrastructure Available

Phase 1 (2025,2030)	40,600 DU
Phase 2 (2035,2040)	45,500 DU
Phase 3 (2045)	85,600 DU
Total	151,700 DU

Industrial Only

Urban Reserves Capacity and Infrastructure Timing

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