



MEMORANDUM

TO: Southwest Washington Regional Transportation Council Board of Directors
FROM: Matt Ransom, Executive Director
DATE: September 26, 2017 *MR*
SUBJECT: **Regional Transportation Plan – 2018 Update, Growth and Demographic Analysis**

AT A GLANCE - ACTION

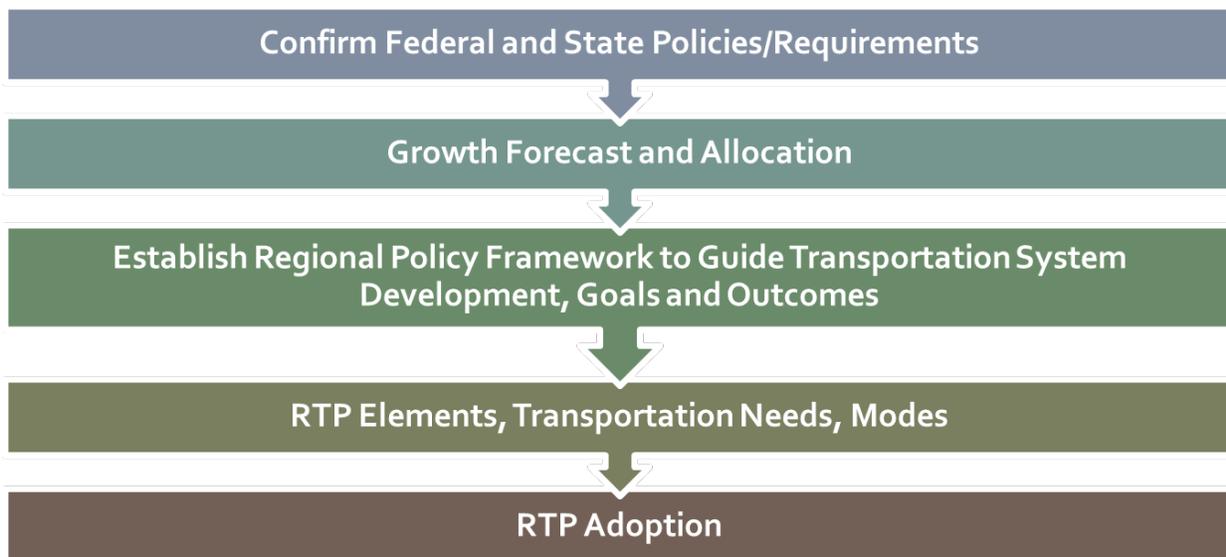
This agenda item will provide background regarding regional growth and demographic trends that influence regional travel. The background will serve the RTC Board as we begin to establish a regional policy framework to guide the transportation system development and set goals and outcomes for the 2018 RTP Update.

BACKGROUND

The long-range Regional Transportation Plan is a part of the required federal and state transportation planning process and represents the collective strategy for developing a regional transportation system to provide mobility, accessibility, and reliability for person trips and freight. The RTP includes all transportation modes and presents the framework plan to guide the longer-term development of the regional transportation system.

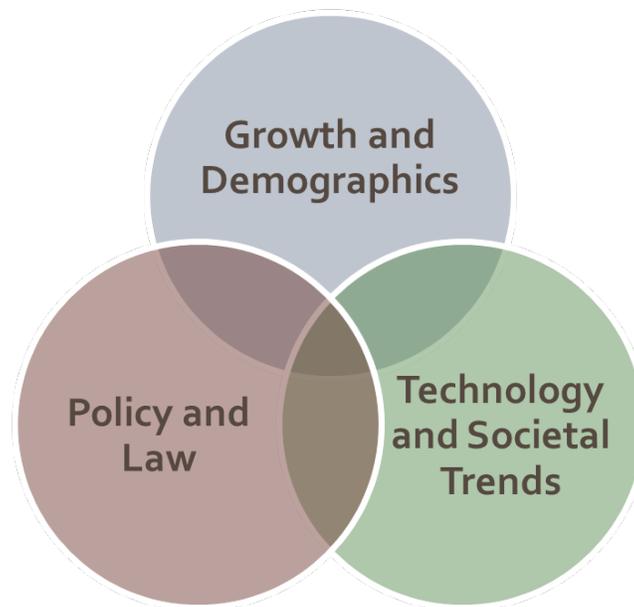
At the September RTC Board meeting the Board adopted a 2040 forecast of population and employment for Clark County for the 2018 RTP update. As the Board prepares to discuss policy, goals and outcomes it is important to consider a number of things that influence regional travel.

2018 RTP Update Process



INFLUENCES ON REGIONAL TRAVEL

The RTP provides the regional framework for the long-term development of the regional transportation system and the goals and desired outcomes from that development. Outside the regional transportation system there are three major areas that impact regional travel on the system. First, growth and changing demographics add increasing demands on the system and changing needs. Second, evolving technology and societal trends change the way people and freight interact with the transportation system. And finally, policy and laws implemented at the federal, state and local levels influence everything from the adoption of new technologies to the funding of system improvements.



The Nexus of Influences on Regional Travel

GROWTH AND DEMOGRAPHICS

Regional growth is one of the major issues that the RTP update will need to address. Since the end of the Great Recession, strong growth and economic development has returned to the Portland/Vancouver metropolitan region. Clark County is part of a major metropolitan area that is expected to add over 627,000 people and 425,000 new jobs between 2016 and 2040. This growth will add considerable demand for travel to our regional system.

Along with growth, nature of our population is changing. Nationally, regionally and locally we are becoming more diverse. The US Census estimates that by 2020, the majority of children (under 18 years old) will be from racial and ethnic minorities. Additionally, declining birth rates

in conjunction with the aging Baby Boomer generation is creating a shift towards an older population. In Clark County, the population that is 65 years or older is forecast to increase by 90% between 2016 and 2040, while the population under 65 increases by less than 20%. The travel needs and behaviors of this rapidly growing segment of the population differ from younger, working families with children at home.

At the October board meeting, staff will review recent growth, as well as forecasted growth, for the metropolitan region and Clark County. The review will include observed and forecasted demographic changes around age, race, ethnicity, poverty, disability and auto ownership. Attached is a draft growth and demographic profile that will be used to update growth and demographic data contained in chapter 2 of the RTP.

Attachment

201710RTCB-GrowthDemographics.docx

Growth and Demographic Profile

2018 Regional Transportation Plan Update

Clark County
Skamania County
Klickitat County
City of Vancouver
City of Camas
City of Washougal
City of Battle Ground
City of Ridgefield
City of La Center
Town of Yacolt
City of Stevenson
City of North Bonneville
City of White Salmon
City of Bingen
City of Goldendale
C-TRAN
Washington DOT
Port of Vancouver
Port of Camas-Washougal
Port of Ridgefield
Port of Skamania County
Port of Klickitat
Metro
Oregon DOT
14th Legislative District
17th Legislative District
18th Legislative District
20th Legislative District
49th Legislative District



Draft: September 2017

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INTRODUCTION

The long-range Regional Transportation Plan is a part of the required federal and state transportation planning process and represents the collective strategy for developing a regional transportation system to provide both mobility and accessibility for person trips and freight. The RTP includes all transportation modes and presents the framework plan to guide the longer-term development of the regional transportation system. The Plan supports the Comprehensive Growth Management Plan for Clark County and existing and future economic development. Regular update of the RTP is a federal requirement to ensure continuation of federal transportation funding to the region. Update to the RTP is needed not only to fulfill federal requirements but also to maintain consistency between state, regional, and local plans.

THE CURRENT RTP

The current Regional Transportation Plan, with a horizon year of 2035, was adopted by the RTC Board in December 2014. The current Plan's 2035 population forecast is 562,207 and employment forecast is 232,500. The land use allocation is based on the draft forecast of population and employment from the 2016 Comprehensive Growth Management Plan Update for Clark County (subsequently adopted in June 2016). Identification of projects in the long-range Metropolitan Transportation Plan, also known as the MTP, allows for the programming of projects for federal and state funding in the Transportation Improvement Program.

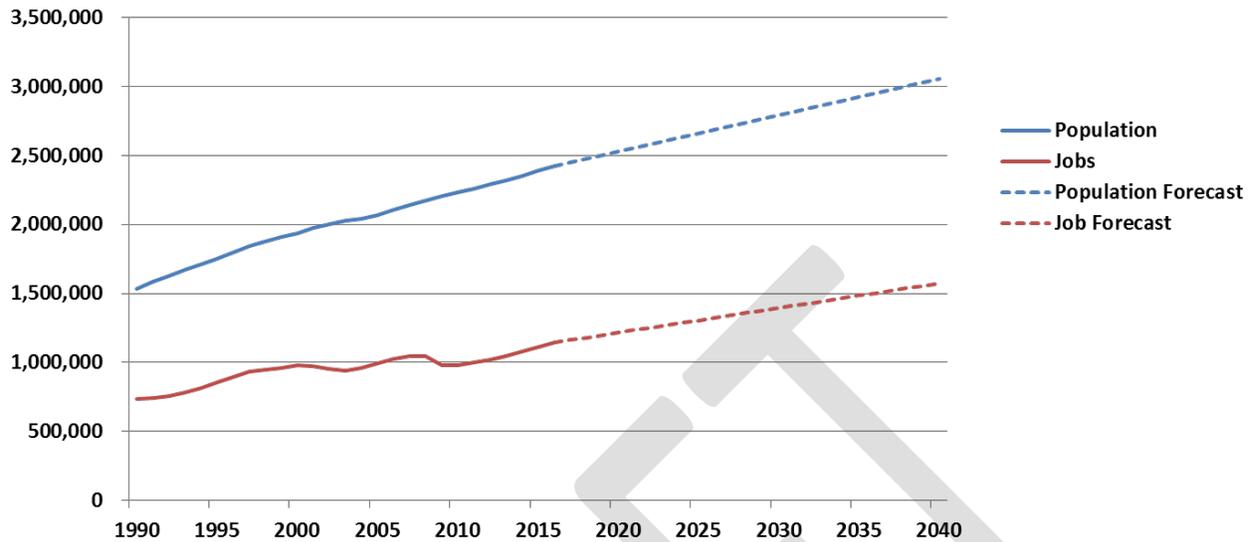
2018 RTP UPDATE

The 2018 RTP update is driven by federal requirements that a Plan update must be adopted at least every four years. An RTP must be in place at the end of 2018 to ensure uninterrupted receipt of federal funds for transportation projects programmed in the Transportation Improvement Program (TIP). The RTP update must address prescribed federal planning factors including support for economic vitality, transportation safety, security, accessibility and mobility options for people and freight, environmental protection and enhancement, energy conservation, quality of life, transportation system connectivity, efficient system management and operation and preservation of the existing system. The adopted plan must also maintain consistency between federal, state and local plans. These plans include local comprehensive and capital facilities plans, C-TRAN's 20-year Transit Development Plan, WSDOT's Highway System Plan, WSDOT's Strategic Highway Safety Plan, and the Washington Transportation Plan with policy goals of economic vitality, preservation, safety, mobility, environment and stewardship.

DEMOGRAPHIC PROFILE

Establishing household and employment growth forecasts and allocations are important steps in the RTP update process. The number and location of future households and jobs is an integral part of defining the future the plan will address. While the number and location of households and employment are major factors that influence the magnitude and patterns of future travel in the region, they are not the only demographic factors that influence future travel behavior and decisions. This document provides data on many of these national, regional and county demographic trends and other socioeconomic factors, including: growth forecasts, age, driver licensing, race and ethnicity, poverty, auto ownership/availability, and employment sectors.

Portland/Vancouver/Hillsboro Metropolitan Statistical Area – 1990 to 2016 Population and Employment Growth with 2040 Forecasts



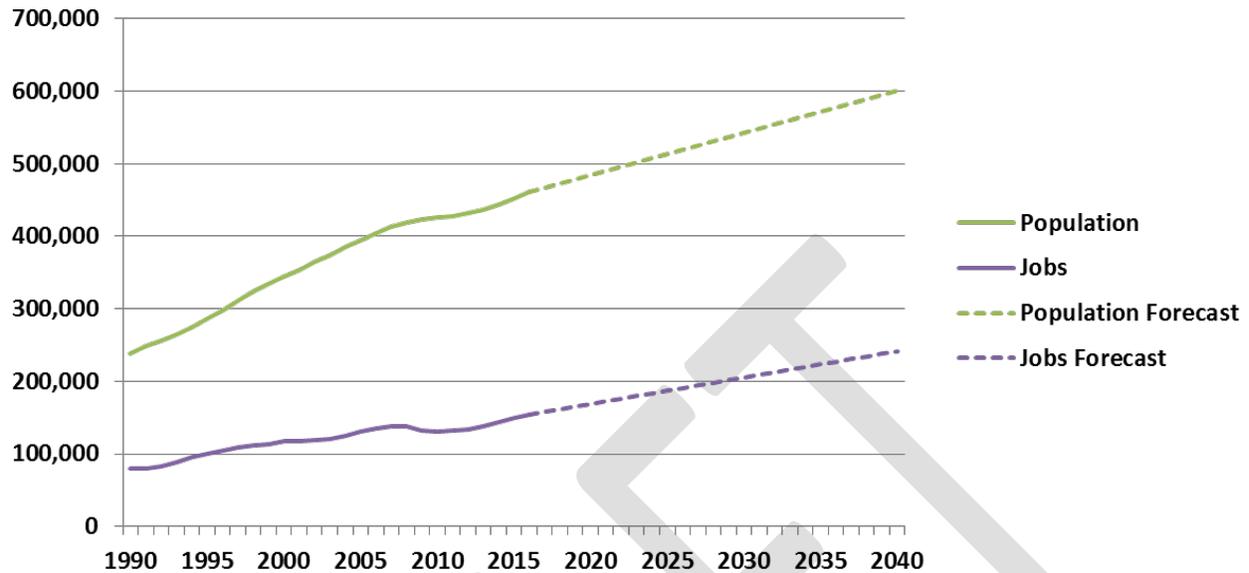
The counties of Clark WA, Skamania WA, Multnomah OR, Washington OR, Clackamas OR, Columbia OR and Yamhill OR make up the federally designated Portland/Vancouver/Hillsboro Metropolitan Statistical Area (MSA). The area is comprised of the greater Portland/Vancouver metropolitan area and surrounding counties that have strong social and economic ties to core urban area.

Between 1990 and 2016, the 7-county MSA has grown from 1,536,000 people to 2,425,000, an increase of about 889,000 people or 57.8%. During the same time period, jobs increased from 737,000 to 1,146,000, an increase of 408,000 or 55.4%

The 7-county MSA region is forecast to grow to over 3,052,000 people and 1,573,000 jobs by 2040. This is a 24-year increase of 627,000 persons and 425,000 jobs.



Clark County – 1990 to 2016 Population and Employment Growth with 2040 Forecasts

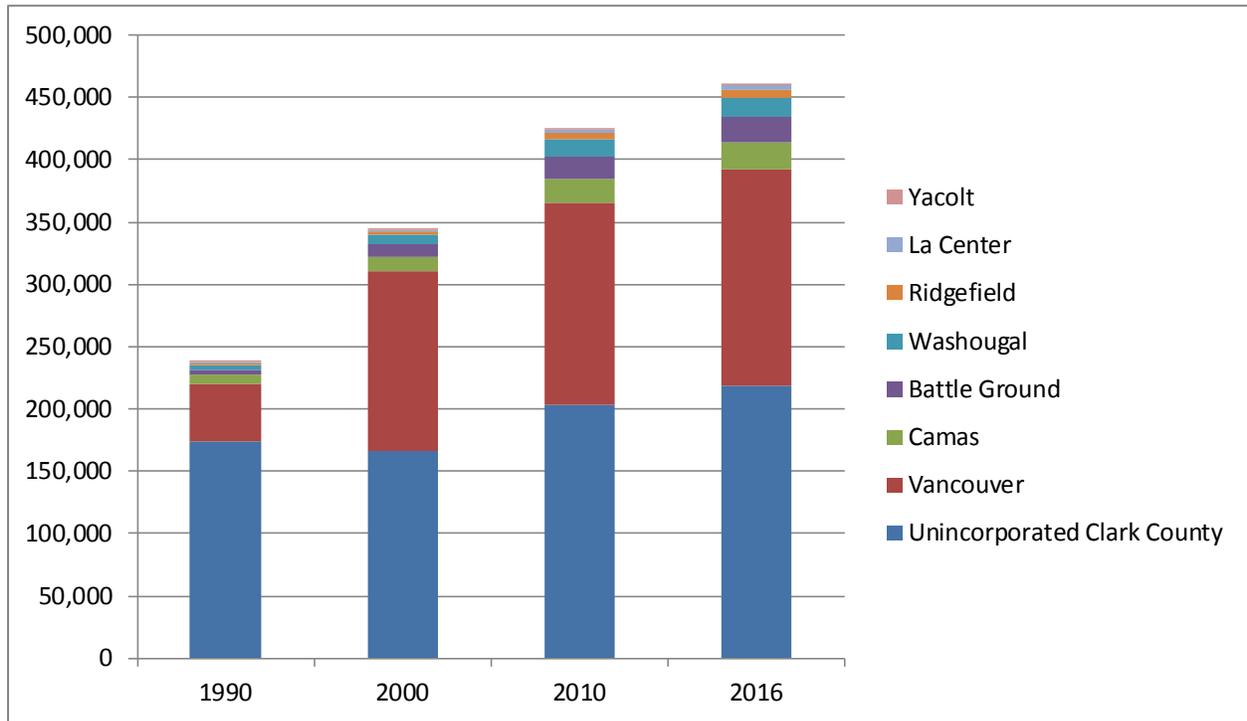


Between 1990 and 2016, Clark County has grown from 238,000 people to 461,000, an increase of about 223,000 people or 93.6%. During the same time period, jobs increased from 80,000 to 155,000, an increase of 75,000 or 93.7%

The county is forecast to grow to over 600,000 people and 241,500 jobs by 2040. This is a 24-year increase of 139,000 persons and 86,500 jobs.

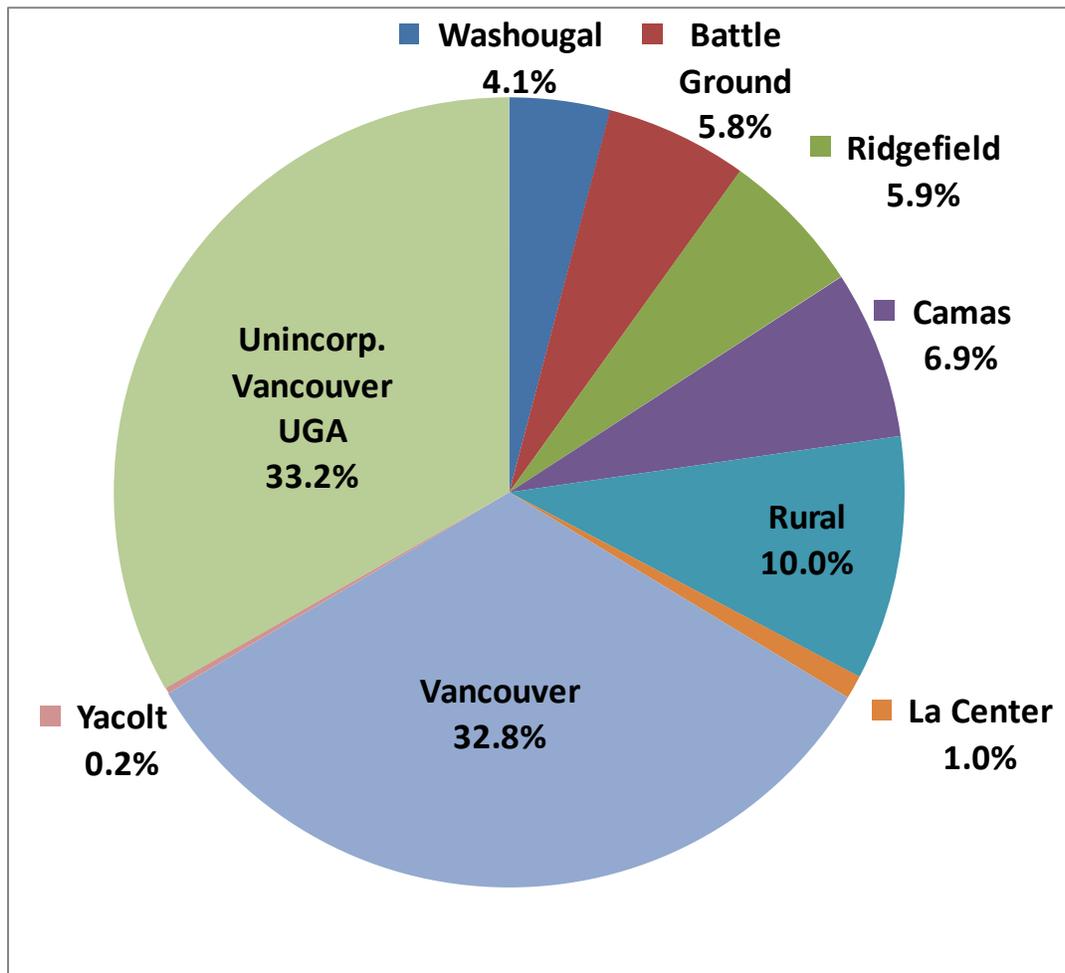
The 139,000 increase in population is about 22% of the MSA's growth from 2016 to 2040. The additional 87,500 represent about 20% of the MSA jobs growth for the same period. Clark County's share of the MSA population increases from 19% to 19.5% and job share increases from 13.5% of the MSA total in 2016 to over 15% by 2040.

Clark County – 1990 to 2016 Population by Jurisdiction



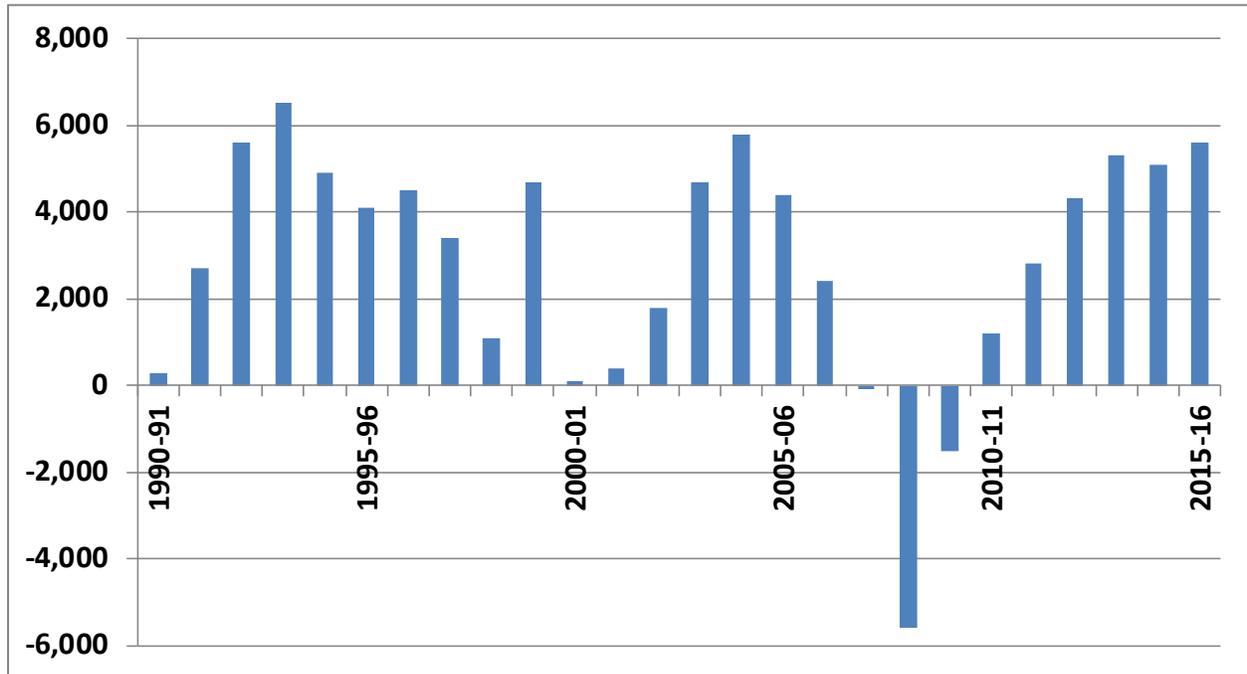
Between 1990 and 2016, the proportion of Clark County residents living in the small cities of Camas, Battle Ground, Washougal, Ridgefield, La Center and Yacolt has double from about 7.5% in 1990 to about 15% today.

Clark County – 2010 to 2016 Population Growth Distribution



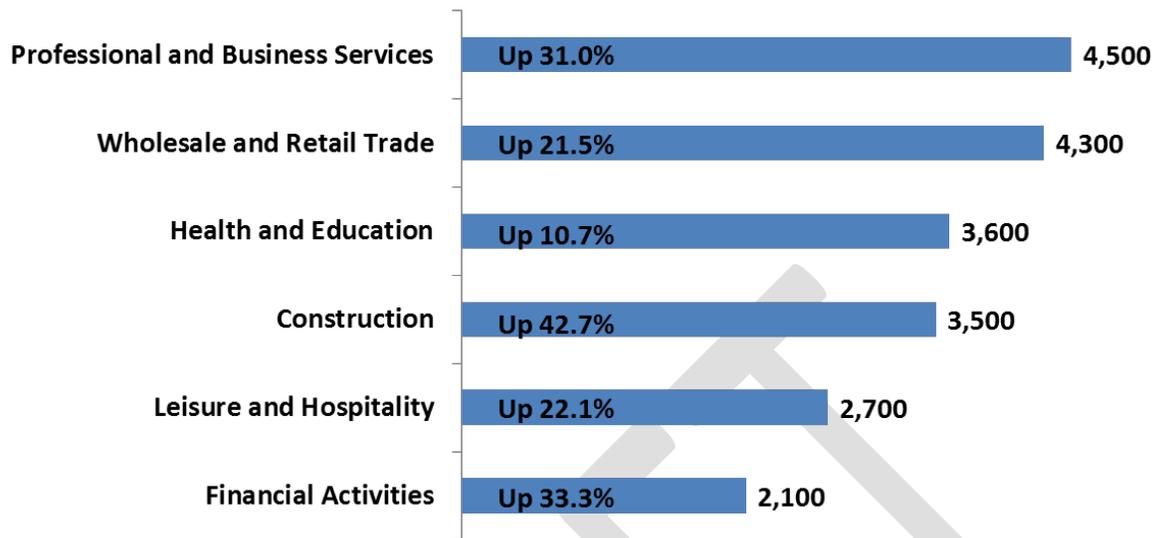
Between 2010 and 2016 Clark County's population increased by over 35,000 persons. About 66% of the population growth during this 6-year period located in the City of Vancouver or the unincorporated Vancouver UGA. An additional 4,000 people, or 11% of the growth, located in Camas or Washougal. About 77% of the county's growth has occurred with core contiguous urban area over the past 6 years.

Clark County – 1990 to 2016, Annual Change in Non-Farm Wage and Salary Employment



Clark County lost over 7,200 jobs during the recent recession. The number of jobs in the county did not recover to 2007 pre-recession levels until 2014. The county has added over 5,500 jobs over the last year and the unemployment rate has fallen below 5%.

Clark County – From 2010-2016, Top 6 Economic Growth Sectors



Growth of jobs in these 6 sectors of the economy account for over 85% of the 24,000 jobs added to the county between 2010 and 2016, the main years of economic recovery. The strong up-tick in construction jobs is related to the county's recent strong population and economic growth.

Clark County - 1990 to 2016 and 2040 Forecast, Average Households

	1990	2000	2010	2016	2040
Average Household Size	2.69	2.69	2.67	2.71	2.66

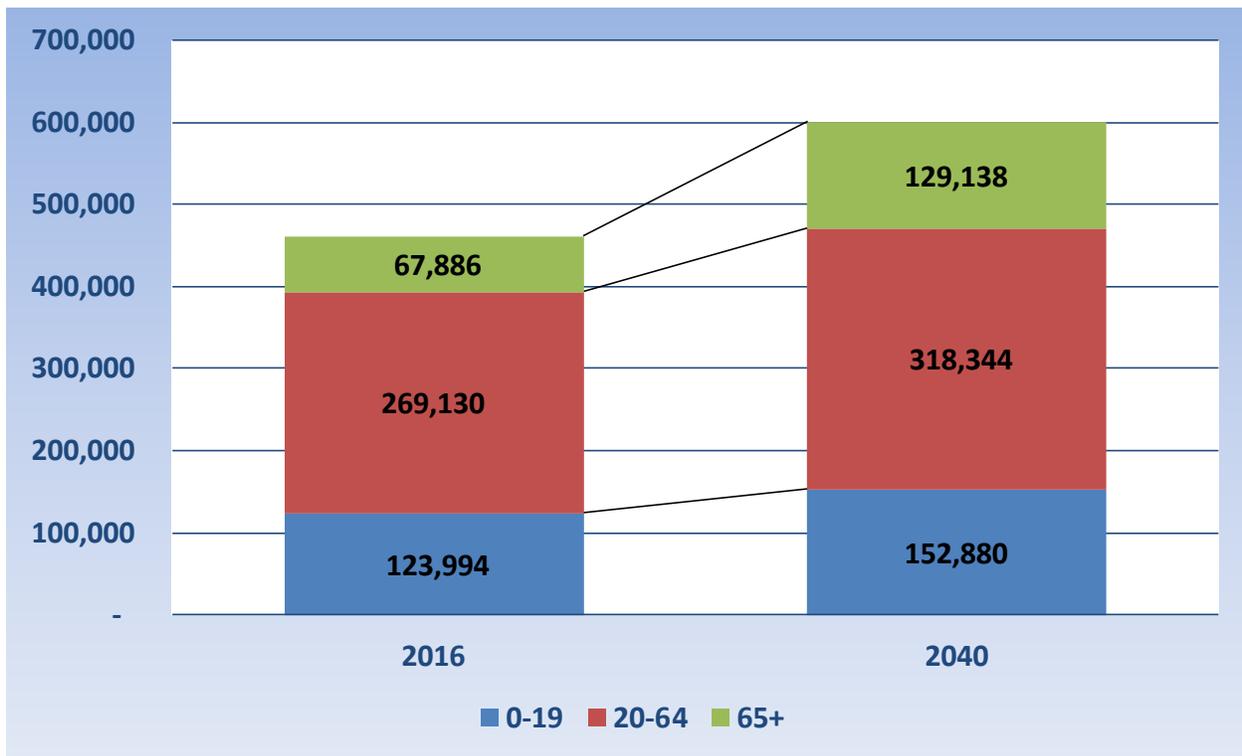
For the past 20+ years, Clark County's average household size has fluctuated around 2.7 persons per household. As the county ages the household size is expected to decrease on average, resulting in a slightly smaller average household size in 2040 of around 2.66. Average household size varies across jurisdictions, with the City of Vancouver the lowest at about 2.5 and the smaller cities and unincorporated areas averaging around 3 persons per household

Clark County - 2016 Household Size Distribution

Household Size	Percentage of Total Households
1 person	22.0%
2 persons	34.1%
3 persons	16.9%
4 persons	16.8%
5 persons	6.3%
6 persons	2.4%
7+ persons	1.5%

The majority of households in Clark County, over 56%, are 1 and 2-person households.

Clark County - 2016 and 2040 Forecast. Population by Age

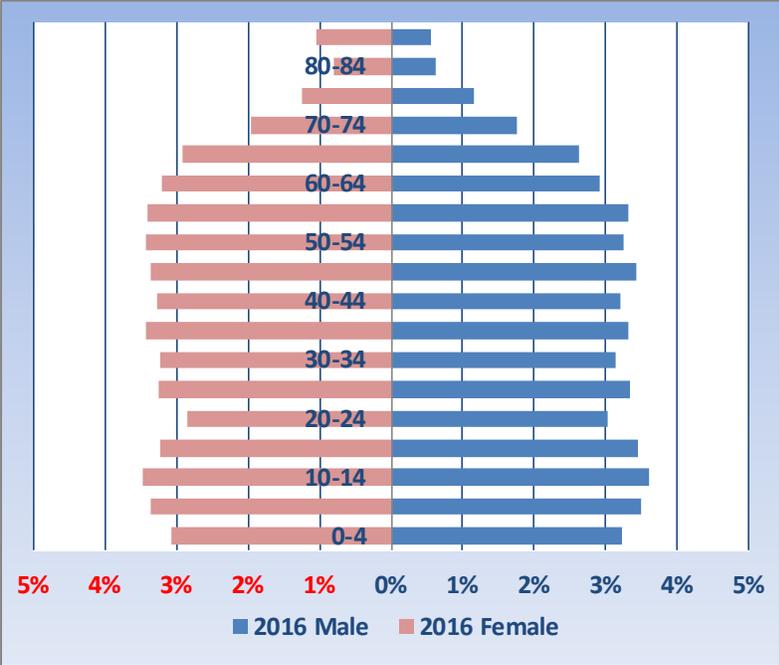


The aging of Clark County's population has already begun. In 2010, the 65 and older population represent was 11.5% of the total, in 2016 that proportion has risen to nearly 15%. By 2040 over 21% of the county's population will be over the age of 64.

Between 2016 and 2040, the 65+ population is expected to increase by 90%, the under 20 cohort by about 23% and the 20-64 year old population by about 18%.

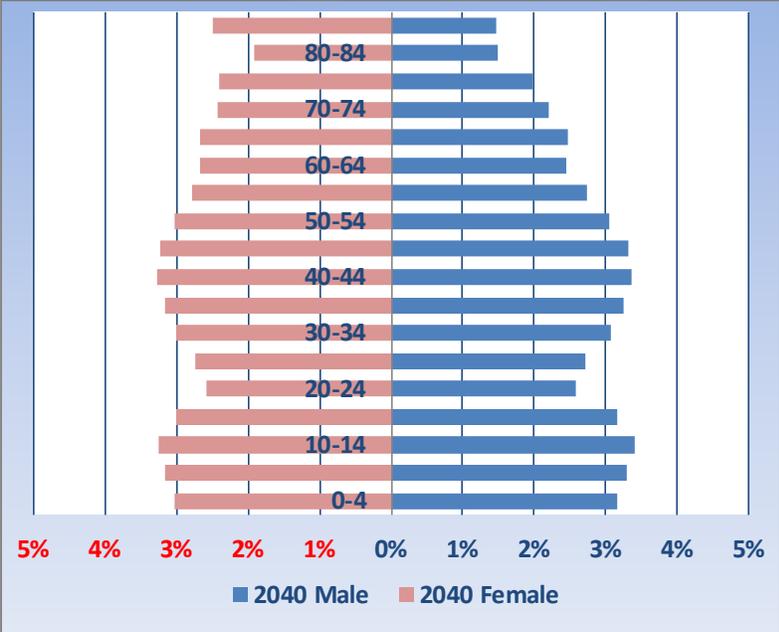
Only about 20% of the county's population growth will be among 0-19 year olds, an impact of declining birth rates locally as well as nationally.

Clark County - 2016, Population Pyramid by Age and Sex



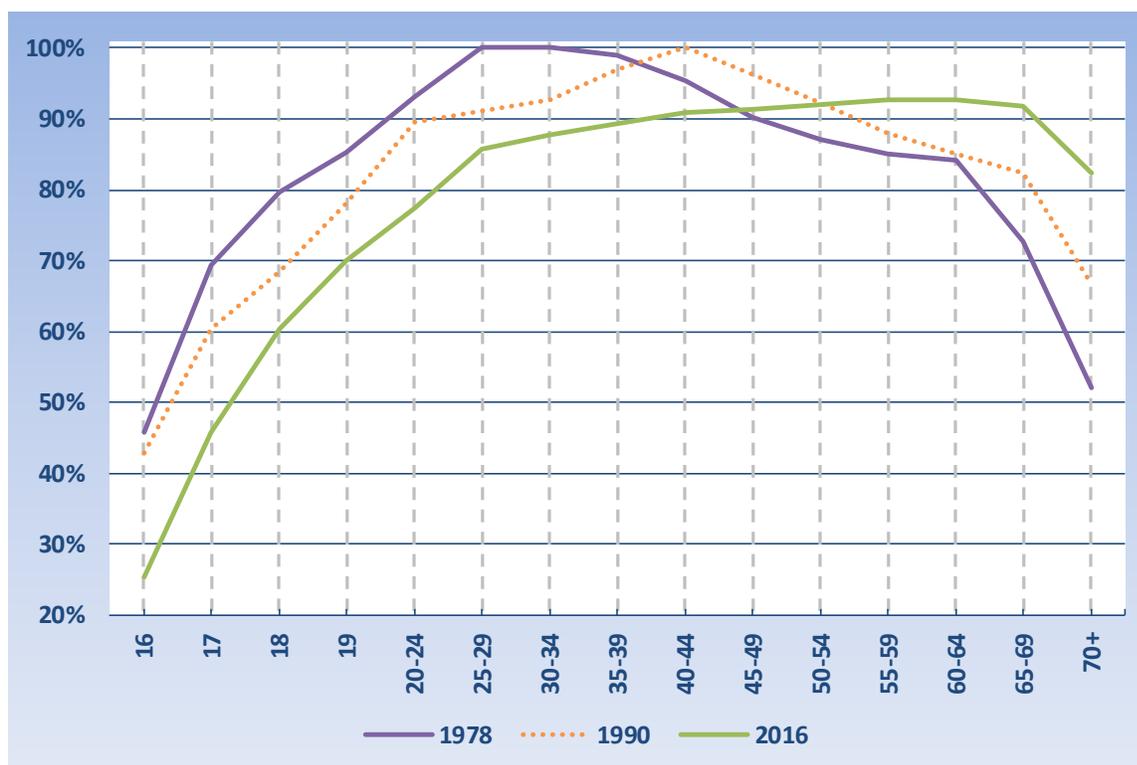
In 2016, the population is pretty well balanced across all ages and both sexes. This is representative of a population that is relatively stable, with births only adding slightly to overall population growth.

Clark County - 2040 Forecast, Population Pyramid by Age and Sex



By 2040, there is a strong shift in population at the top of the pyramid due to the increase number of elderly persons, compounded by increasing life expectancies.

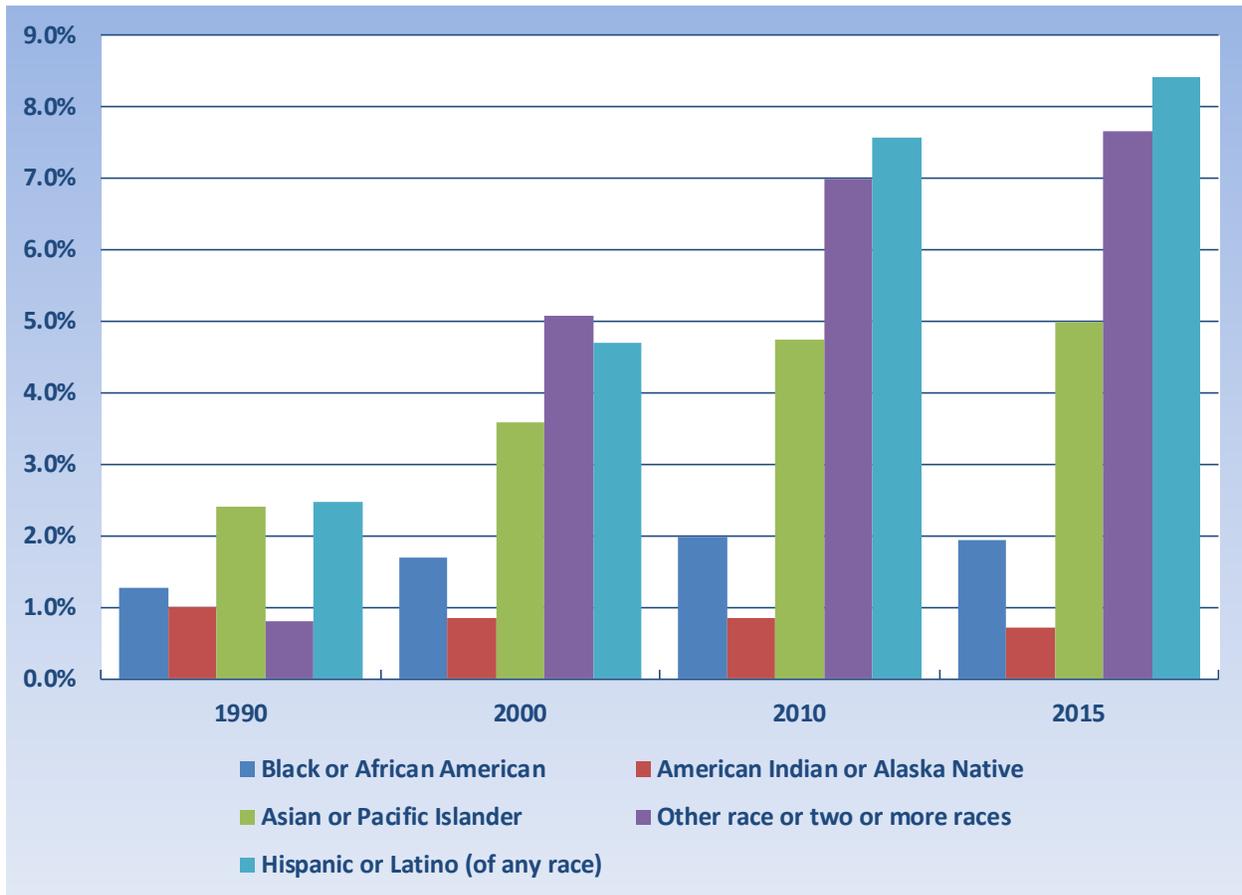
US National Data - 1978, 1990 and 2016 – Licensed Drivers as a Percentage of Age



There are changing trends in the area of drivers' licensing with relation to age. This is a graph of the share of licensed drivers by age – for 1978 (the first year the data was available), 1990 and 2016. Note, this is national data; however there are two main points of interest.

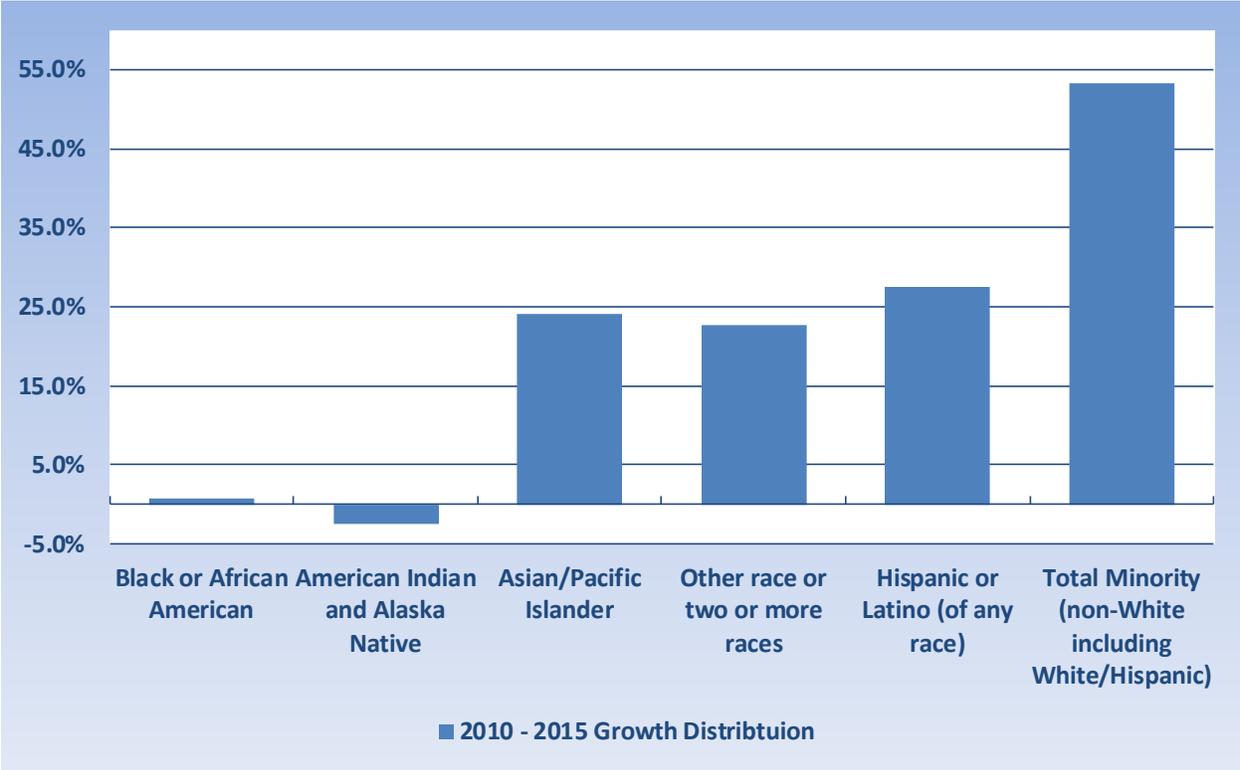
First, the percentage of those 65+ with a driver's license has seen 20 to 30 point gains in their age groups. The 70+ group has moved from a bit over half licensed in 1978 to over 80% as of 2016. Conversely, the percentage of those under age 40 with a driver's license have seen a 10 to 24 point drop within their age groups. For example, the percentage of licensed 17 year olds has dropped to about 45% from a high of nearly 70% in 1978. Even the 30 to 34 year old group has dropped from near 100% to less than 90%.

Clark County - 1990, 2000, 2010 and 2015, Minority Populations by Percentage



Back in 1980, minorities represented less than 5% of the county's population. In 2015 that figure has increase to nearly 20%. The strongest growth has been the Hispanic and Asian communities. The number of persons identifying as multi-racial has increase since the inclusion of the category in the Census starting in 2000.

Clark County – From 2010 to 2016, Minority Share of Population Growth



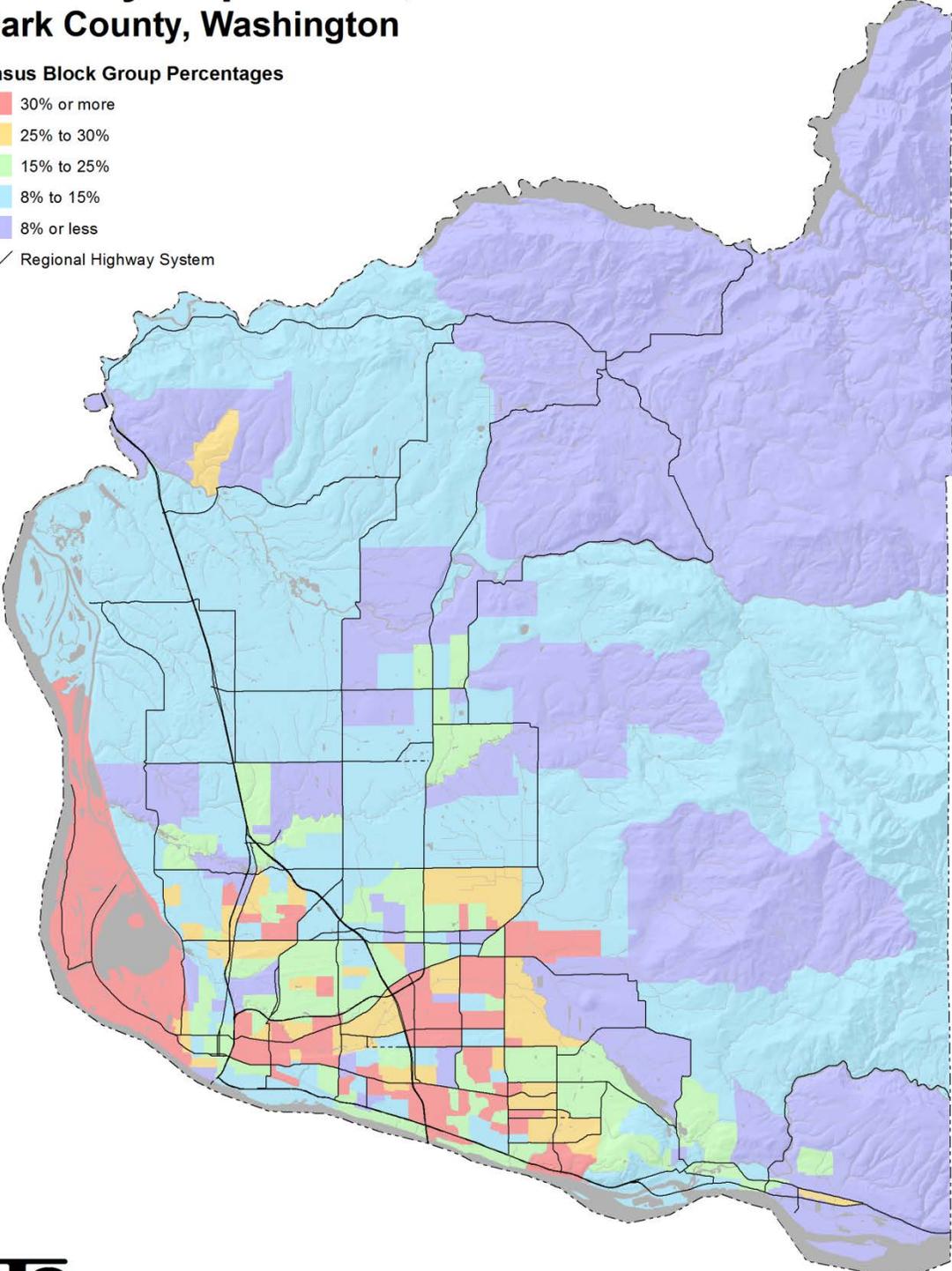
Minority populations are the fast growing the county. From 2010 to 2016, minority persons account for 53.3% of the county's growth.

Minority Population, 2015

Clark County, Washington

Census Block Group Percentages

- 30% or more
- 25% to 30%
- 15% to 25%
- 8% to 15%
- 8% or less
- Regional Highway System



Source: 2011-2015 American Community Survey, 5-Year Estimate

Clark County – 2015, Poverty Statistics by Race and Hispanic/Latino Origin

Population for whom poverty status is determined	Poverty Rate										
	All persons	<u>Race</u>								<u>Ethnicity</u>	<u>Race and Ethnicity</u>
		White alone	Black or African American alone	American Indian and Alaskan Native alone	Asian alone	Native Hawaiian and other Pacific Islander alone	Some other race alone	Two or more races	White alone, not Hispanic or Latino	Hispanic or Latino	Total Minority (non-White including White/Hispanic)
440,404	11.2%	10.2%	22.4%	20.9%	9.2%	10.1%	27.9%	15.0%	9.7%	22.7%	19.7%

The poverty rate in Clark County is 11.2% with the overall the poverty rate for minority persons nearly 20%. The poverty rate for Hispanic and African American persons is twice the county rate.

The median household income figures below mirror the poverty figures.

Clark County- 2015, Median Household Income by Race and Hispanic/Latino Origin

All Households	<u>Race of Household (selected categories)</u>								<u>Ethnicity of householder</u>
	White alone	Black or African American alone	American Indian and Alaskan Native alone	Asian alone	Native Hawaiian and other Pacific Islander alone	Some other race alone	Two or more races	White alone, not Hispanic or Latino	Hispanic or Latino
\$60,756	\$61,954	\$42,788	\$50,500	\$70,577	\$51,466	\$39,786	\$55,363	\$62,593	\$41,362

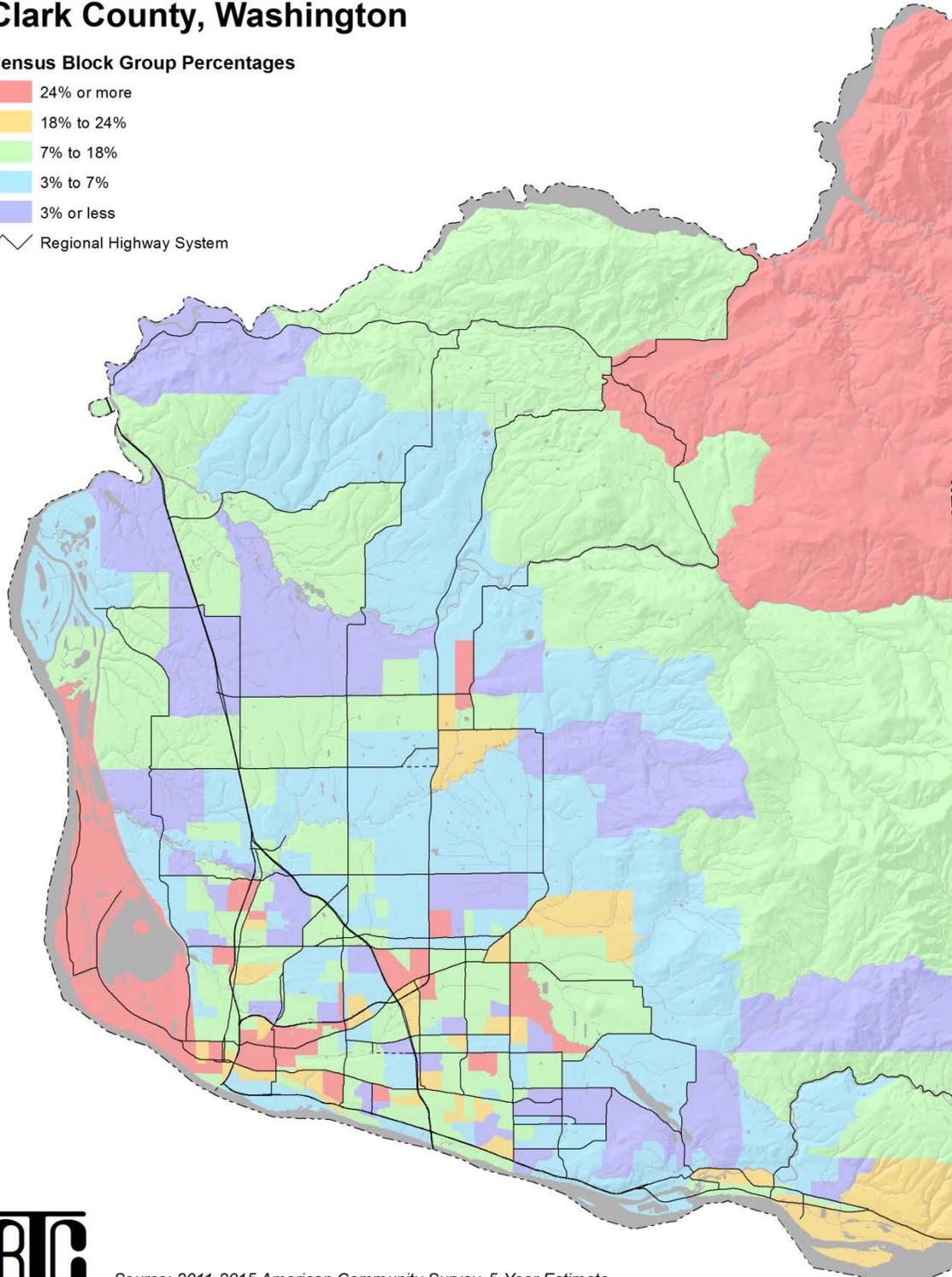
Low-Income Population, 2015

Clark County, Washington

Census Block Group Percentages

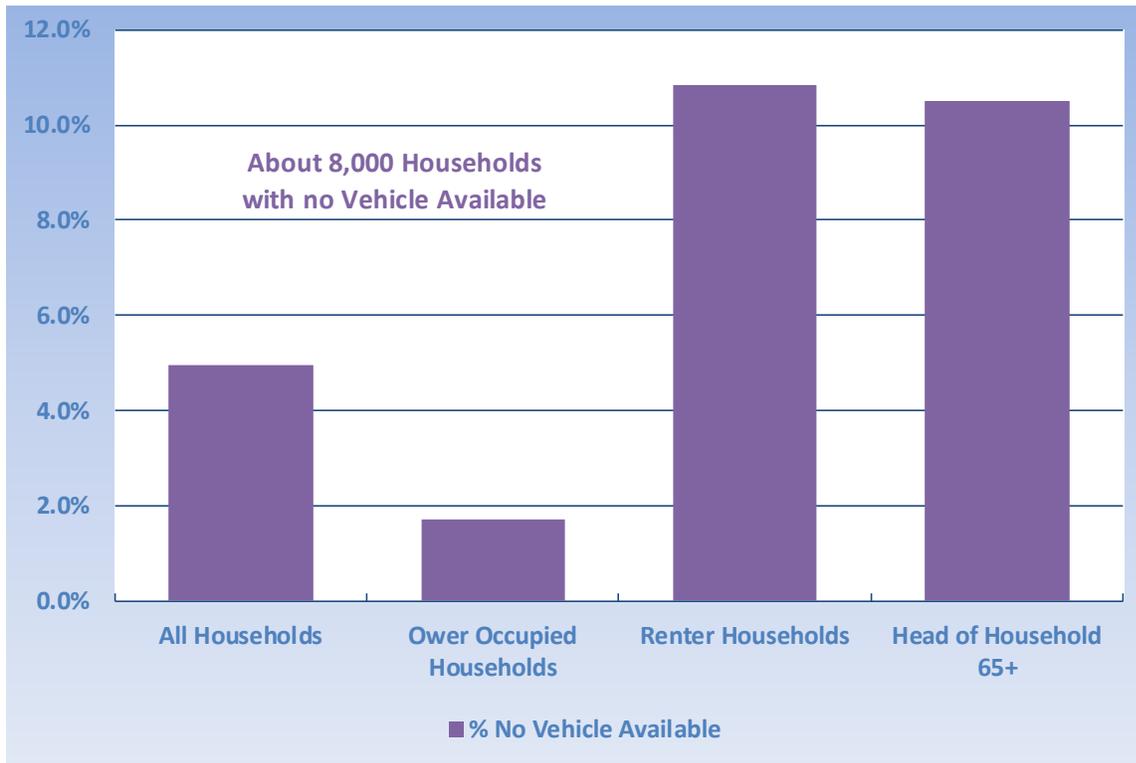
- 24% or more
- 18% to 24%
- 7% to 18%
- 3% to 7%
- 3% or less

 Regional Highway System



Source: 2011-2015 American Community Survey, 5-Year Estimate

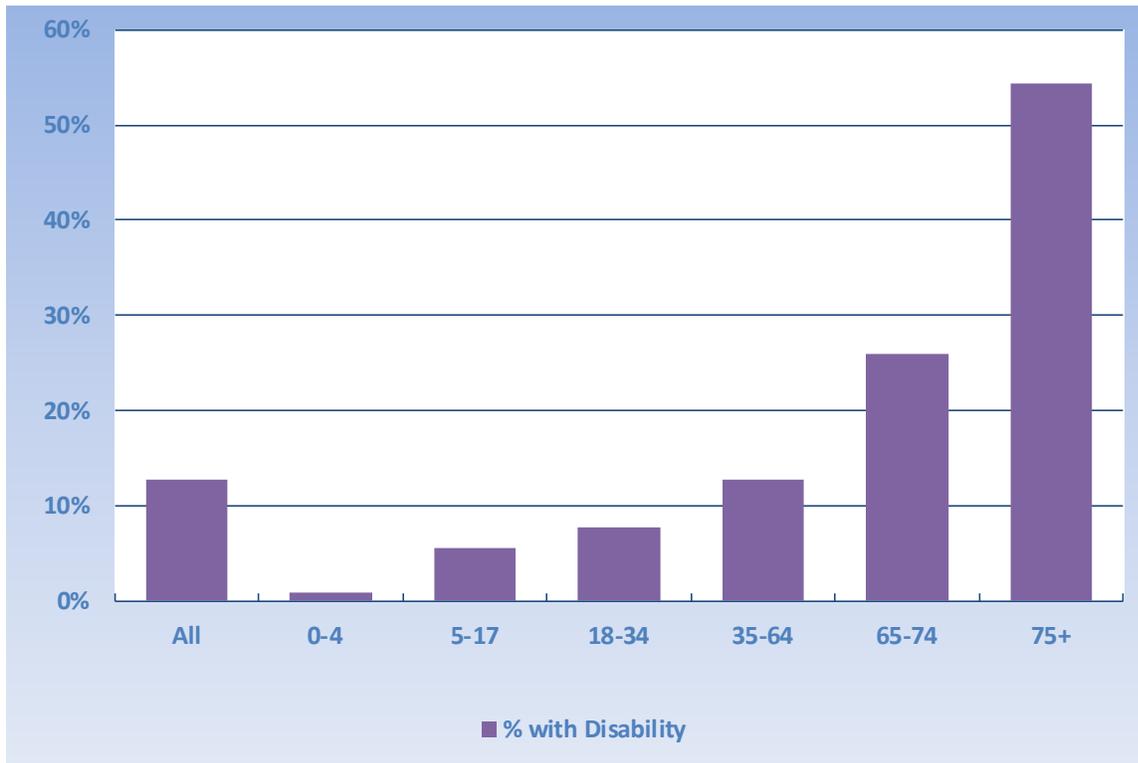
Clark County – 2015, Vehicle Availability by Household Tenure and Age



About 8,000 Clark County households have no vehicle available for use.

There is a significant difference between renter vs. owner occupied households, with 10.8% of renting households with no vehicle available compared to less than 2% for owner occupied households. Looking at age, for households where the head of the household is 65 or older, over 1 in 10 households do not have access to a car.

Clark County – 2015, Persons with a Disability by Age



Nearly 13% of Clark County's population lives a disability. Naturally, those over the age of 65 are more likely to have a disability. Those 65 to 74 are twice as likely to have disability as the population as a whole and those 75 and older are over 4 times more likely to be living with a disability.