Oregon Population Forecast Program
Regional Forecast Meeting – March 10, 2017

Preliminary Coordinated Forecasts for Tillamook County, its Urban Growth Boundaries (UGBs), and the Area Outside UGBs
Oregon Population Forecast Program
Project Team

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Program Manager

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Administrative Assistant

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Undergraduate Research Assistant

Randy Morris,
Research Analyst
Agenda

• Present and discuss preliminary forecast results
  • Proposed Forecasts by March 31st, 2017; Posted on Oregon Population Forecast Program (OPFP) website: http://www.pdx.edu/prc/opfp
• Explain our assumptions for future change
• Obtain your feedback
Assumptions for County and Larger Sub-Area Forecasts

1. In general, as the economy continues to strengthen we assume an increase in net in-migration and a corresponding growth in housing construction.
   a) Despite net in-migration slowing at end of the last decade, recent net in-migration will accelerate in the nearer-term and then decline a bit.
   b) Net in-migration will occur over the entire forecast horizon.
2. We incorporate national trends into our assumptions for fertility and mortality rates.
   a) As a result of aging Baby Boomers, deaths increase and peak in 2040, with total deaths tapering through 2050.
   b) Total fertility rates decline throughout the entire forecast period.
   c) As a result the County will continue to experience natural decrease but at a greater magnitude.
3. Population increases will become more dependent on net in-migration.
These numbers represent **Preliminary** Forecast Results
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Historical and Forecast Trends

These numbers represent **Preliminary** Forecast Results

Tillamook County—Average Annual Births

Sources: Oregon Health Authority, Center for Health Statistics. Calculations and Forecast by Population Research Center (PRC).

Note: The years signify the end of the period for which average annual numbers were calculated. The average annual numbers for "2010" were calculated for the 2000-2010 period, with the remaining years calculated for their preceding five-year periods.
### Total Fertility Rate (TFR)

<table>
<thead>
<tr>
<th></th>
<th>2000</th>
<th>2010</th>
<th>2015</th>
<th>2035</th>
<th>2065</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tillamook County</td>
<td>2.23</td>
<td>2.14</td>
<td>1.97</td>
<td>2.10</td>
<td>2.04</td>
</tr>
<tr>
<td>Oregon</td>
<td>1.98</td>
<td>1.80</td>
<td>1.83</td>
<td>1.78</td>
<td>1.73</td>
</tr>
</tbody>
</table>


These numbers represent *Preliminary* Forecast Results.
Historical and Forecast Trends

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Sources: Oregon Health Authority, Center for Health Statistics. Calculations and Forecast by Population Research Center (PRC).

Note: The years signify the end of the period for which average annual numbers were calculated. The average annual numbers for "2010" were calculated for the 2000-2010 period, with the remaining years calculated for their preceding five-year periods.
### Life Expectancy (Years)—Total Pop

<table>
<thead>
<tr>
<th></th>
<th>2000</th>
<th>2010</th>
<th>2060</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Tillamook County</strong></td>
<td>78.8</td>
<td>79.1</td>
<td>86.5</td>
</tr>
<tr>
<td><strong>Oregon</strong></td>
<td>77.9</td>
<td>79.6</td>
<td>86.9</td>
</tr>
</tbody>
</table>

*Source: U.S. Census Bureau.*
Historical and Forecast Trends

Tillamook County—Average Annual Natural Increase/Decrease

Sources: Oregon Health Authority, Center for Health Statistics. Calculations and Forecast by Population Research Center (PRC).

Note: The years signify the end of the period for which average annual numbers were calculated. The average annual numbers for "2010" were calculated for the 2000-2010 period, with the remaining years calculated for their preceding five-year periods.

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Historical and Forecast Trends

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### Historical and Forecast Populations for Tillamook County and its Sub-Areas

<table>
<thead>
<tr>
<th></th>
<th></th>
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<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Tillamook County</td>
<td>24,262</td>
<td>25,250</td>
<td>0.4%</td>
<td>26,071</td>
<td>28,879</td>
<td>32,747</td>
<td>0.6%</td>
<td>0.4%</td>
</tr>
<tr>
<td>Bay City UGB</td>
<td>1,209</td>
<td>1,358</td>
<td>1.2%</td>
<td>1,418</td>
<td>1,727</td>
<td>2,174</td>
<td>1.1%</td>
<td>0.7%</td>
</tr>
<tr>
<td>Garibaldi UGB</td>
<td>915</td>
<td>783</td>
<td>-1.5%</td>
<td>795</td>
<td>863</td>
<td>967</td>
<td>0.5%</td>
<td>0.4%</td>
</tr>
<tr>
<td>Manzanita UGB</td>
<td>712</td>
<td>827</td>
<td>1.5%</td>
<td>884</td>
<td>1,156</td>
<td>1,567</td>
<td>1.5%</td>
<td>1.0%</td>
</tr>
<tr>
<td>Nehalem UGB</td>
<td>873</td>
<td>1,120</td>
<td>2.5%</td>
<td>1,247</td>
<td>1,687</td>
<td>2,176</td>
<td>1.7%</td>
<td>0.8%</td>
</tr>
<tr>
<td>Rockaway Beach UGB</td>
<td>1,475</td>
<td>1,510</td>
<td>0.2%</td>
<td>1,565</td>
<td>1,814</td>
<td>2,208</td>
<td>0.8%</td>
<td>0.6%</td>
</tr>
<tr>
<td>Tillamook UGB</td>
<td>5,226</td>
<td>5,605</td>
<td>0.7%</td>
<td>5,570</td>
<td>6,311</td>
<td>7,110</td>
<td>0.7%</td>
<td>0.4%</td>
</tr>
<tr>
<td>Wheeler UGB</td>
<td>391</td>
<td>420</td>
<td>0.7%</td>
<td>409</td>
<td>474</td>
<td>539</td>
<td>0.8%</td>
<td>0.4%</td>
</tr>
<tr>
<td>Outside UGBs</td>
<td>13,461</td>
<td>13,627</td>
<td>0.1%</td>
<td>14,184</td>
<td>14,846</td>
<td>16,006</td>
<td>0.3%</td>
<td>0.2%</td>
</tr>
</tbody>
</table>

Sources: U.S. Census Bureau, 2000 and 2010 Censuses; Forecast by Population Research Center (PRC).

These numbers represent **Preliminary** Forecast Results
## Preliminary Forecast Results

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### County and Larger Sub-Areas—Population and Average Annual Growth Rate (AAGR) (2017, 2035, and 2067)

<table>
<thead>
<tr>
<th></th>
<th>2017</th>
<th>2035</th>
<th>2067</th>
<th>AAGR (2017-2035)</th>
<th>AAGR (2035-2067)</th>
<th>Share of County 2017</th>
<th>Share of County 2035</th>
<th>Share of County 2067</th>
</tr>
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<tbody>
<tr>
<td>Tillamook County</td>
<td>26,071</td>
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<td>0.6%</td>
<td>0.4%</td>
<td>100.0%</td>
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</tr>
<tr>
<td>Smaller UGBs</td>
<td>11,887</td>
<td>14,032</td>
<td>16,741</td>
<td>0.9%</td>
<td>0.6%</td>
<td>45.6%</td>
<td>48.6%</td>
<td>51.1%</td>
</tr>
<tr>
<td>Tillamook Outside UGBs</td>
<td>14,184</td>
<td>14,846</td>
<td>16,006</td>
<td>0.3%</td>
<td>0.2%</td>
<td>54.4%</td>
<td>51.4%</td>
<td>48.9%</td>
</tr>
</tbody>
</table>

*Source: Forecast by Population Research Center (PRC)*

*Note: Smaller UGBs are those with populations less than 7,000 in forecast launch year.*

*Note: Only smaller UGBs in Tillamook County*
Assumptions for Smaller Sub-Area Forecasts

1. For UGBs experiencing population growth, we assume a higher growth rate in the near-term, with growth stabilizing over the remainder of the forecast period.

2. If planned housing units were reported in the surveys, then we account for them being constructed over the next 5-10 years.

3. For county sub-areas where population growth has been flat or declined, and there is no planned housing construction, we tend to temper losses over the forecast period.
## Preliminary Forecast Results

### County and Smaller Sub-Areas—Population and Average Annual Growth Rate (AAGR) (2017, 2035, and 2067)

<table>
<thead>
<tr>
<th>Area</th>
<th>2017</th>
<th>2035</th>
<th>2067</th>
<th>AAGR (2017-2035)</th>
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<td>863</td>
<td>967</td>
<td>0.5%</td>
<td>0.4%</td>
<td>3.0%</td>
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<tr>
<td>Manzanita UGB</td>
<td>884</td>
<td>1,156</td>
<td>1,567</td>
<td>1.5%</td>
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*Source: Forecast by Population Research Center (PRC)*

*Note: Only smaller UGBs in Tillamook County*
Local Input and Additional Information

• Questions?
• Discussion time