AMBAG
Board of Directors Meeting

October 14, 2020

Item #1: Call to Order

Item #2: Roll Call

Item #3: Oral Communications from the Public on Items Not on the Agenda

Item #4: Oral Communications from the Board on Items Not on the Agenda

Item #5: Appointment of Nomination Committee

Recommended Action: Appoint

Item #6A: Executive/Finance Committee

Recommended Action: Information

Item #6B: Monterey Bay National Marine Sanctuary (MBNMS) Advisory Council (SAC) Meeting

Recommended Action: Direct

Item #7: Executive Director's Report

Recommended Action: Information

Item #8: Consent Agenda (Items #8A-8G)

Recommended Action: Approve

Item #9: Items Removed from Consent Calendar for Discussion and Possible Action

Item #10A: Final 2022 Regional Growth Forecast

Recommended Action: Information

Summary

- Background and purpose of forecast

- Final Draft 2022 Regional Growth Forecast

- Subregional Allocation and Review

- Next Steps

What is the Forecast?

- Forecast for tri-county area:
  - Population
  - Housing
  - Employment
- Base Year – 2015
  - Some data through 2019/2020
- Horizon Year – 2045
- Basis for planning for growth in the MTP/SCS, transportation project level analysis, corridor studies, economic analysis, etc.
- Input for the Regional Travel Demand Model which forecasts travel patterns

Growth Forecast vs. RHNA Allocation

- Forecast alone does not guide Regional Housing Needs Allocation (RHNA)

- RHNA methodology for disaggregation also considers:
    - Fair share (avoiding disproportionate income categories)
    - Lack of service capacity such as water (by statute)
    - Market demands for housing
    - Needs of farm workers
    - Needs generated by a university or college

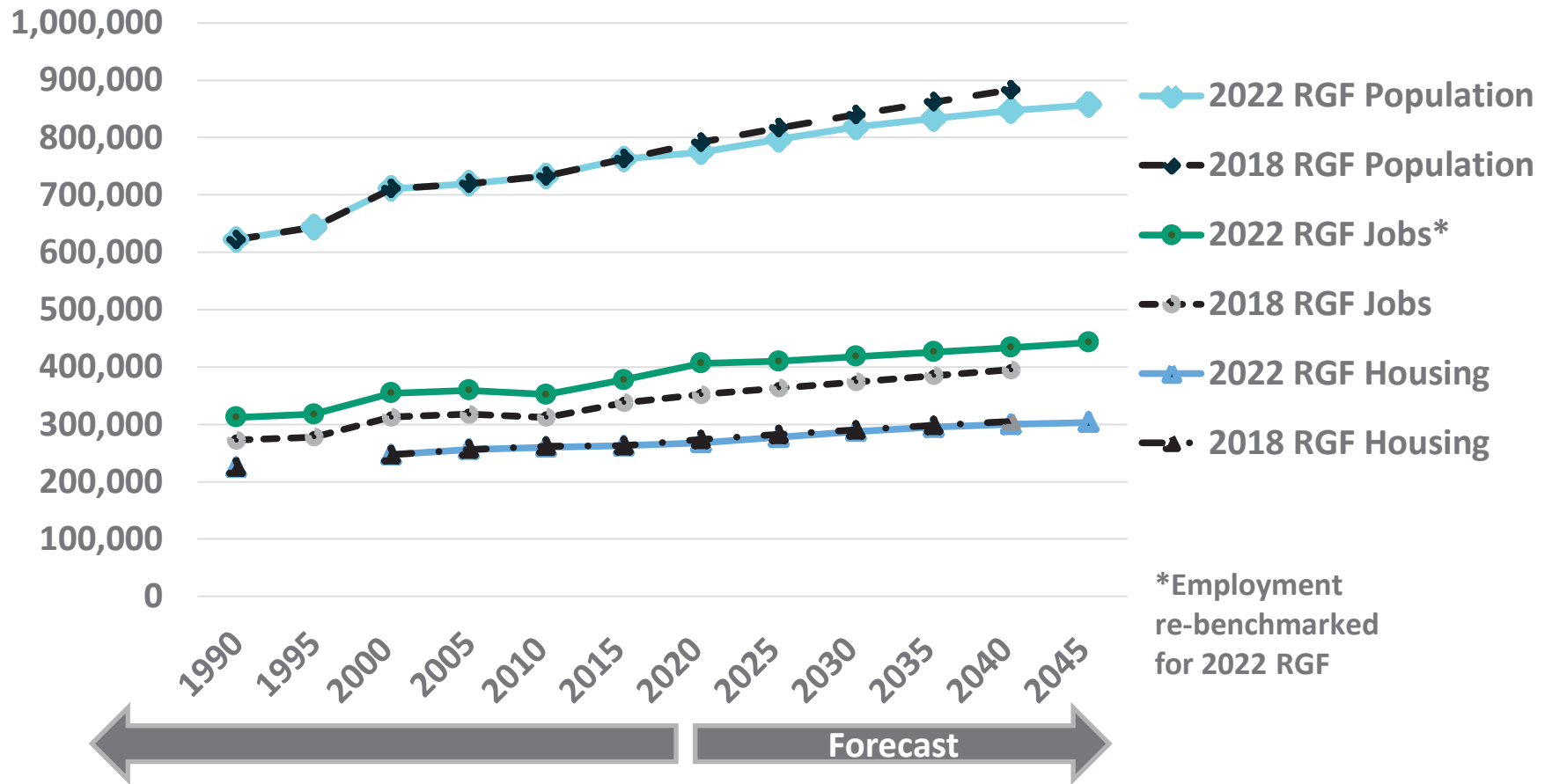- RHNA discussions will begin in 2021 following the development of the growth forecast

Growth Forecast vs. General Plans

- Purpose of regional growth forecast is to show what is likely to occur

- General Plans often look at full potential build out in order to address potential environmental impacts

- Regional forecast is being developed on a different timeline than General Plans

- Due to different goals and different timelines the numbers will not match exactly with any given General Plan

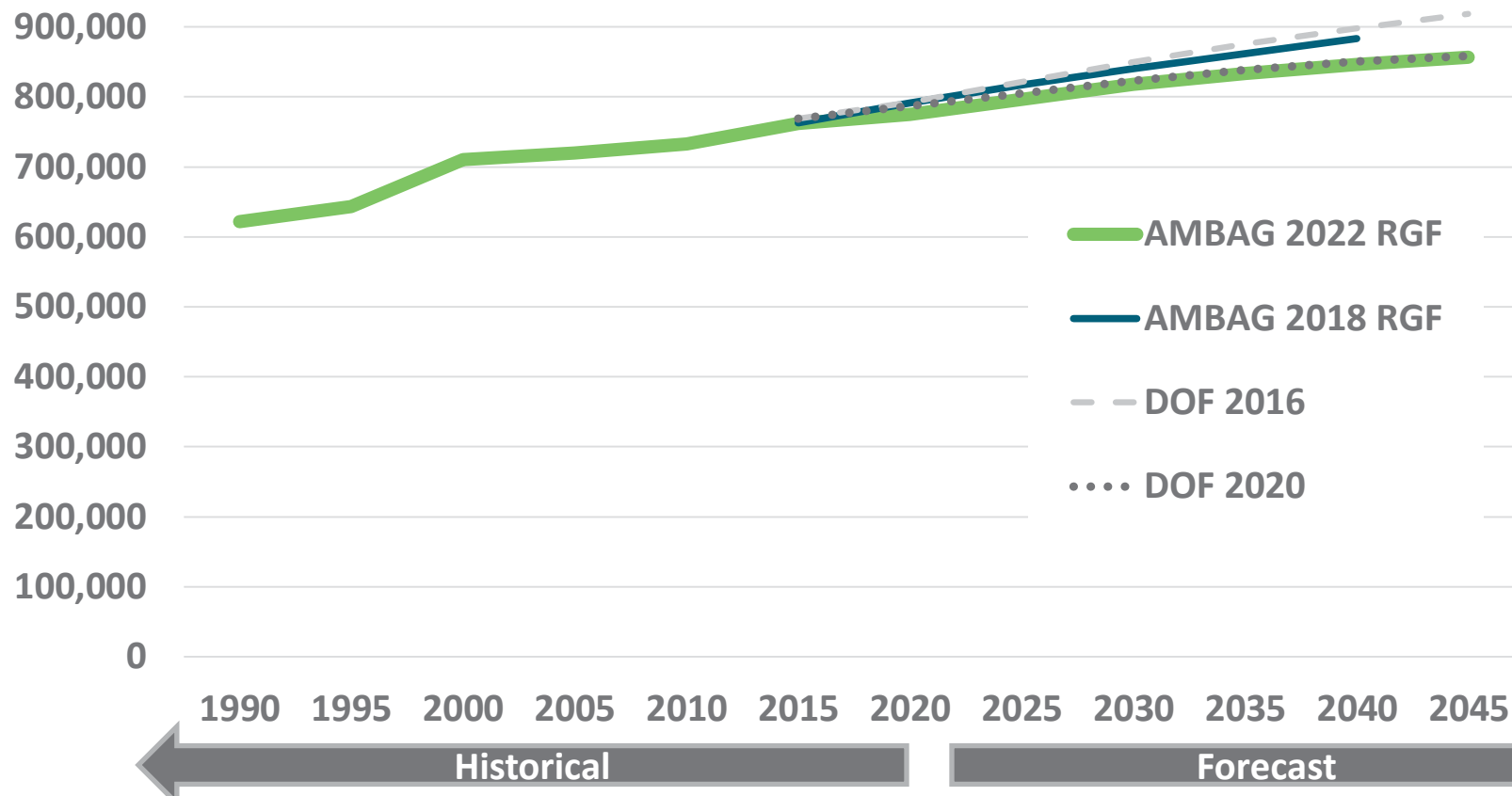# 2022 Regional Growth Forecast Shows Slowing Growth

Number in AMBAG Region

Legend:
- 2022 RGF Population
- 2018 RGF Population
- 2022 RGF Jobs*
- 2018 RGF Jobs
- 2022 RGF Housing
- 2018 RGF Housing

*Employment re-benchmarked for 2022 RGF

Forecast

Sources: California Department of Finance; AMBAG and PRB

18

Population Growth Slowing, Reflected in Lower DOF 2020 Forecast

Total Population

Legend:
- **AMBAG 2022 RGF** (green solid line)
- **AMBAG 2018 RGF** (dark blue solid line)
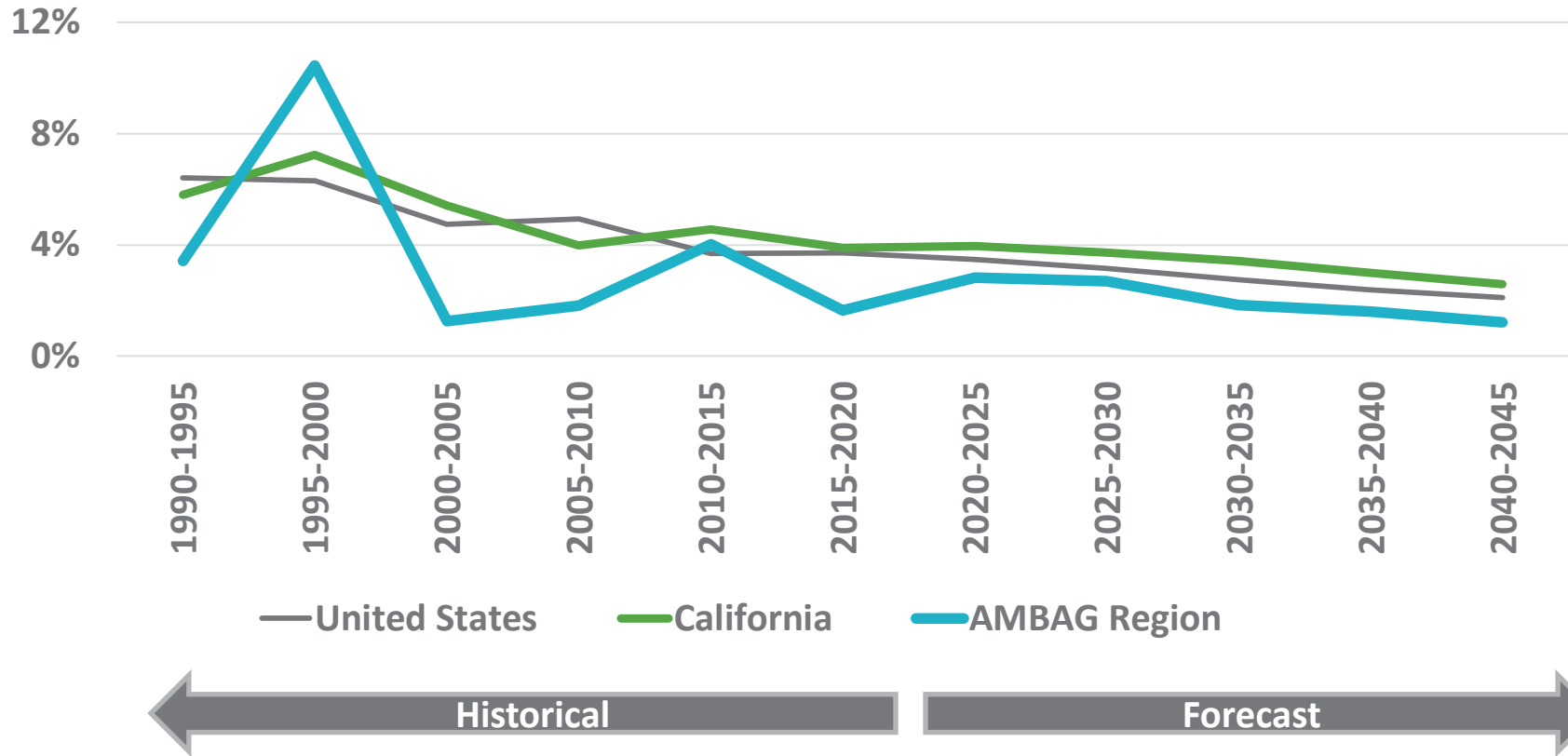- **DOF 2016** (gray dashed line)
- **DOF 2020** (dotted line)

Historical | Forecast

Notes: DOF Current is 2016 base year projection, updated in 2019. DOF 2020 DRAFT was circulated for local review in fall 2019.
Sources: California Department of Finance; AMBAG and PRB

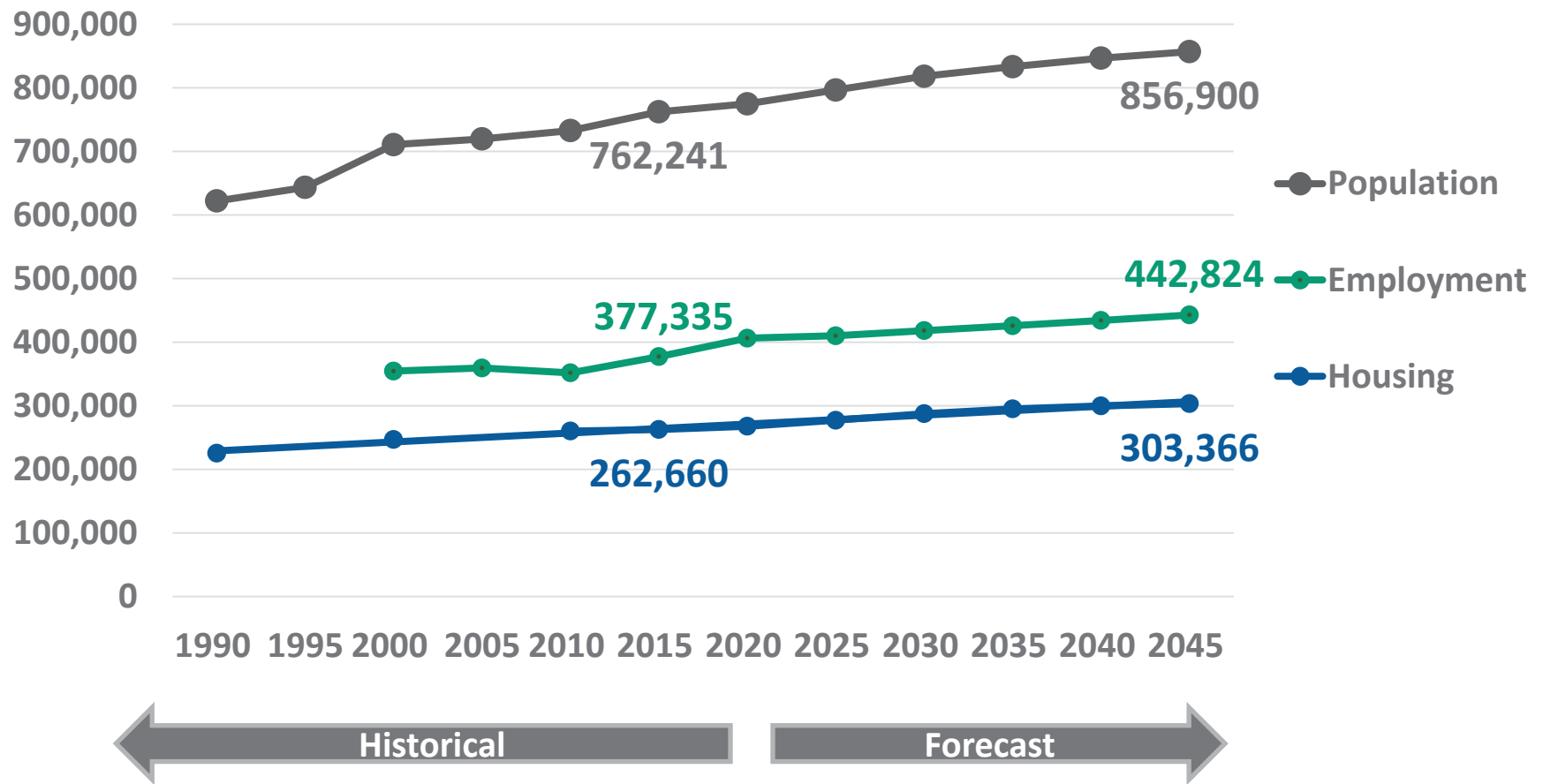# Region's Slowing Growth Rate Reflects Broader Demographic Trends

**Percent Change in Population
(From Prior Period)**

Sources: California Department of Finance; AMBAG and PRB

20

Summary: Final 2022 RGF Population, Employment, Housing

Number in AMBAG Region

Population: 856,900
762,241

Employment: 442,824
377,335

Housing: 303,366
262,660

Historical

Forecast

Sources: California Department of Finance; AMBAG and PRB

Summary: Comparison of 2022 RGF and 2018 RGF

	2022 RGF Population	2018 RGF Population	2022 RGF Jobs*	2018 RGF Jobs	2022 RGF Housing	2018 RGF Housing
2015	762,241	762,676	377,335	337,600	262,660	262,660
2040	846,600	883,300	434,147	395,000	299,773	305,293
2045	856,900		442,824		303,366	

Notes: 2022 Jobs reflect re-benchmarking.
Sources: California Department of Finance; California Employment Development Department; AMBAG and PRB
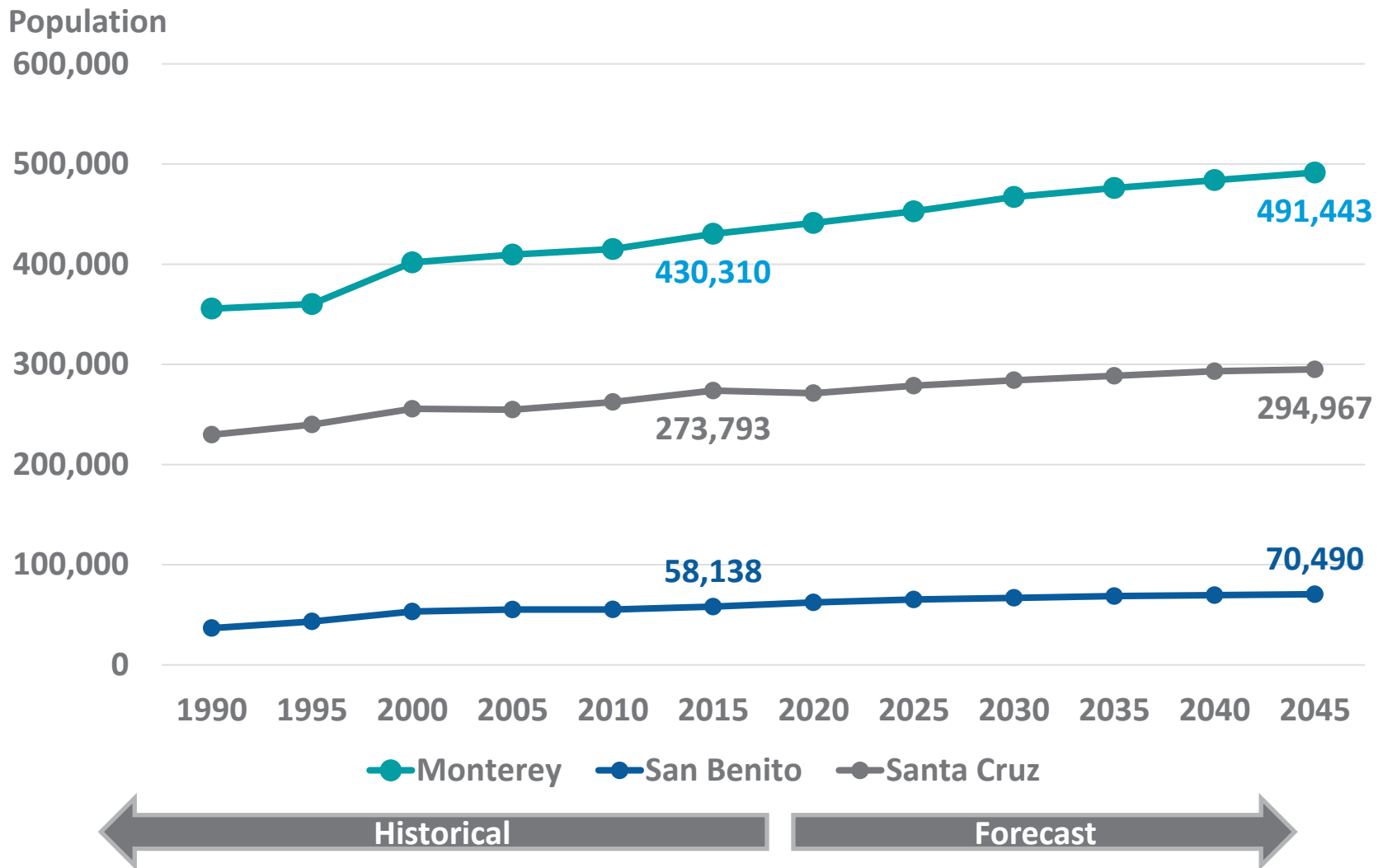
Subregional Allocation Review

- Subregional forecast numbers were reviewed with <u>all</u> jurisdictions

- Feedback was incorporated into the final draft subregional forecast included in Attachment 2

- Conducted more than 80 one-on-one meetings to date with local jurisdictions/agencies plus discussions at Planning Directors Forums (Attachment 3)
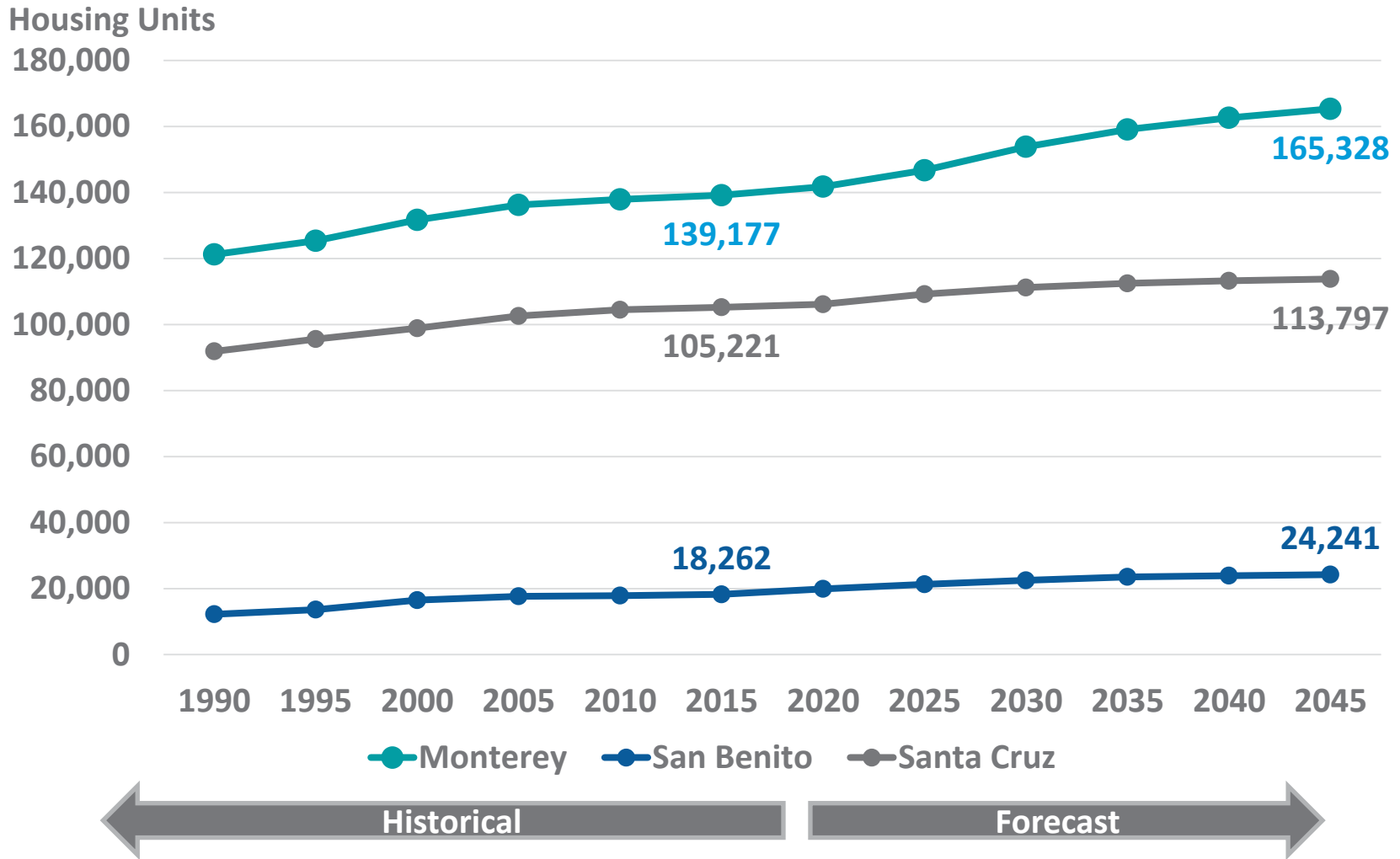
2022 Subregional: Population by County

Population

Monterey	430,310 ... 491,443
San Benito	58,138 ... 70,490
Santa Cruz	273,793 ... 294,967

Legend: ●—Monterey ●—San Benito ●—Santa Cruz

Historical ← → Forecast

2022 Subregional: Housing by County

Housing Units

Monterey: 139,177 (historical) → 165,328 (forecast)
Santa Cruz: 105,221 (historical) → 113,797 (forecast)
San Benito: 18,262 (historical) → 24,241 (forecast)

Legend: Monterey · San Benito · Santa Cruz

Historical · Forecast

Sources: California Department of Finance; AMBAG and PRB

25

2022 Subregional: Jobs by County

Jobs (place of work)
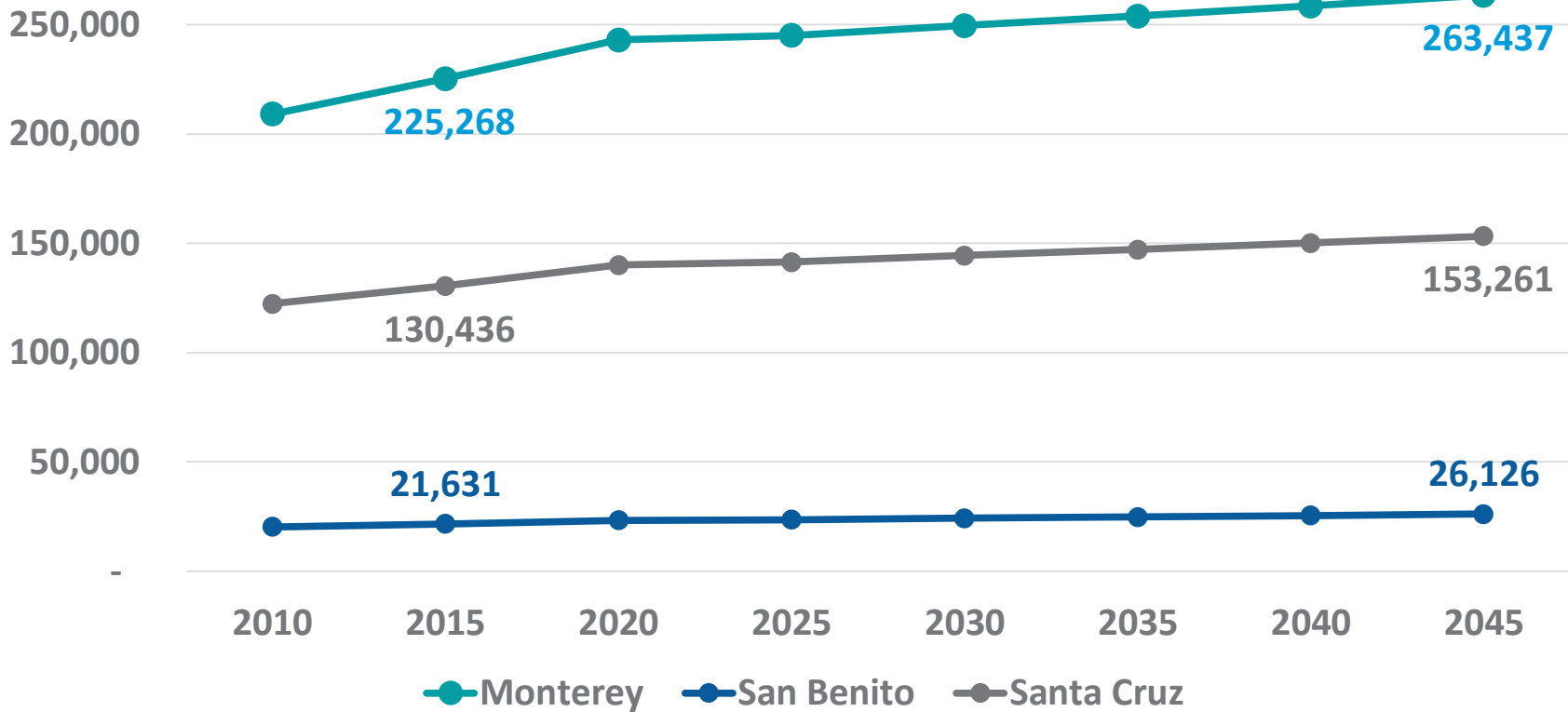
Sources: California Employment Development Dept.; InfoUSA; AMBAG and PRB

Forecast Work To Date

- Prelim Draft Regional Growth Forecast (March 2020)
- Prelim Draft Subregional Growth Forecast input and review with local jurisdictions (May 2020 – July 2020)
- Revised Draft Forecasts released to reflect updated 2020 estimates from DOF and input from local jurisdictions (July 2020)
- Additional feedback received from local jurisdictions on Revised Draft Forecasts (August – September 2020)
- Final Draft Forecasts (October 2020)

Next Steps

- AMBAG Board is scheduled to accept the 2022 RGF and subregional allocation in November

- Later this year, AMBAG modeling staff will work with local jurisdictions to use RGF data to update the traffic analysis zones (TAZs) for the regional travel demand model – requires local jurisdiction input

Questions

Item #11: Adjournment