
Growth Allocations

POPULATION, HOUSING UNITS, AND EMPLOYMENT

PREPARATORY DOCUMENTS FOR
GMATAC WORKSHOP
DISCUSSION DRAFT
August 10, 2023



Prepared for:



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01 PROJECT BACKGROUND

Project Background

Skagit Council of Governments (SCOG) contracted with Community Attributes Inc to prepare two analyses:

1. Countywide projections of **population, housing** and **employment** growth, **allocated** to municipal and non-municipal **urban growth areas** to 2045 in preparation for comprehensive plans due June 30, 2025
2. Projections and allocations to 2050 for SCOG's metropolitan-regional transportation plan and regional travel demand model (**TAZs**)

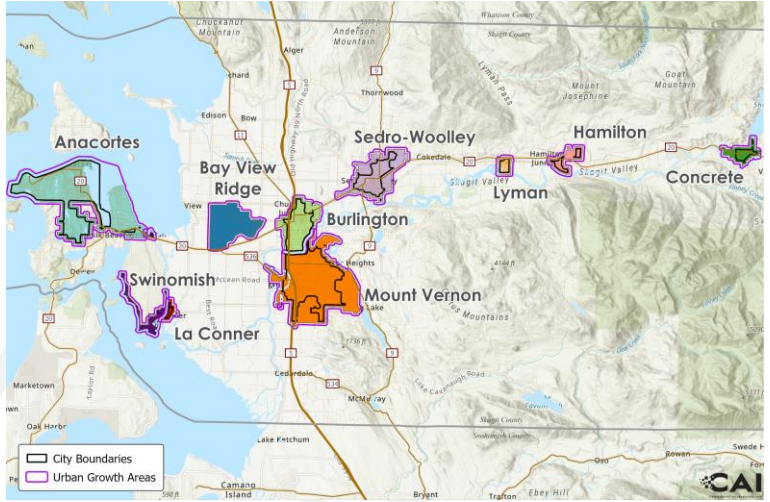
Each county fully planning under GMA must determine growth projections in consultation with cities. These projections are adopted, and the county and city must use the projections in their **comprehensive planning process completed by June 30, 2025**, and make sure that their plans can accommodate the projected level of growth (RCW 36.70A.115).

This document provides background information and context to inform a broader discussion of the methods and data used to forecast future growth in population, housing units, and employment in Skagit County.

Stakeholders are encouraged to review the materials in this document to prepare for the **GMATAC workshop on August 10, 2023**.

Please Note: Discussion questions to be addressed at the GMATAC Workshop on August 10, 2023 appear in shaded boxes throughout this presentation.

Exhibit 1. Skagit County, Cities and Urban Growth Areas Boundaries



02 HOUSING ALL PLANNING TOOL OVERVIEW

In 2021, the Washington Legislature adopted House Bill 1220, which amended the Growth Management Act (GMA) to instruct local governments to “plan for and accommodate housing affordable to all economic segments of the population of the state.”

HB 1220 directed the Washington State Department of Commerce **to provide projected housing needs** to local governments:

- For moderate (81-120% AMI), low (51-80% AMI), very low (31-50% AMI), and extremely-low households (0-30% AMI)
- For permanent supportive housing, emergency housing and emergency shelters (referred to as special housing needs)

Commerce produced housing needs projections for each county in the state which are available in the **Housing All Planning Tool (HAPT)**. The projections:

- Are consistent with Washington State Office of Financial Management (OFM) countywide population projections
- Account for household size, vacancy, group quarters
- Account for historic underproduction

There are **three areas** that the county and cities **can control** in the HAPT tool when developing their housing projections:

- **Total countywide population projection.** The user can enter

a population growth target within the OFM projections range, and the tool produces a projected countywide housing need aligned to that specific population target. See sample screenshot in Exhibit 2 on page 5.

- **Percentage distribution of growth by jurisdiction.** The tool allows the user to decide how much housing growth goes to each individual jurisdiction and unincorporated area as a share of total countywide housing need. See sample screenshot in Exhibit 3 on page 6.
- **Income band allocation method.** The tool provides two allocation options. Counties and cities may develop their own allocation method.
 - Method A allocates the **same percentage shares of their net new housing growth target** by income level for all jurisdictions. **Housing need** is distributed regardless of the existing supply of housing within each income category.
 - Method B allocates housing need so that by **2045 each jurisdiction will have the same share of their total housing supply at each income level.** This method **accounts for differences in baseline (2020) housing supply by income level.** Jurisdictions with an undersupply of housing in an income category take on a greater portion of total housing need for that category. Jurisdictions with an oversupply of housing in an income category will show negative housing need. See Exhibits 4 and 5 on page 7.

02 HOUSING ALL PLANNING TOOL OVERVIEW

The county **must select a population target that is within the range of OFM’s Low, Medium, and High GMA Population Projection**. In this example, the selected medium OFM population projection of 160,830 people for Skagit County in 2045 results in a total future housing need of 70,413 units for the same year (or 17,452 net new units needed between 2020, the baseline year in the HAPT tool, and 2045).

Exhibit 2. Screenshot of the Housing for All Planning Tool (HAPT) with Example Population Target (OFM Medium)

Housing Needs Projections for Selected County, Projection Year, and Population Target
 Complete Steps 1, 2, and 3 to access countywide projections

Step 1
Select a County
Skagit ✓

Step 2
Select a Projection Year
2045 ✓

Step 3
Enter Population Target in Range
160,830 ✓

Table 1: OFM GMA Population Projections, 2045
 Skagit County Projected Population, 2045

	Low	Medium	High
Projected Population (2045)	142,840	160,830	195,316

Table 2: Projected Countywide Housing Needs Based on User Inputs
 Skagit County
 Population Target = 160,830

	Total	Affordability Level (% of Area Median Income)						Emergency Housing/Shelter Beds	
		0-30%	30-50%	50-80%	80-100%	100-120%	120%+		
Total Future Housing Needed (2045)	70,413	4,801	1,672	8,197	16,062	9,429	6,452	23,800	595
Estimated Housing Supply (2020)*	52,962	1,937	62	5,329	13,558	8,089	5,262	18,724	310
Net New Housing Needed (2020-2045)	17,452	2,864	1,610	2,868	2,504	1,340	1,190	5,076	285

* Note: Supply of PSH in 2020 is beds. However, projections of Net New Housing Needed (2020-2045) are in housing units. See Overview tab for details.

Source: Department of Commerce, Housing for All Planning Tool; Community Attributes, 2023. Example population target selected for illustration purposes only.

02 HOUSING ALL PLANNING TOOL OVERVIEW

Exhibit 3. Screenshot of the Housing for All Planning Tool (HAPT) with Example Allocation by Jurisdiction (2010-2020 Share of County Population Growth)

Skagit County		Projection Year: 2045 Population Target = 160,830		Permanent Housing Needs by Income Level (% of Area Median Income)							Emergency Housing Needs (Temporary)
		Total	0-30% Non-PSH	PSH	>30-50%	>50-80%	>80-100%	>100-120%	>120%		
Countywide Estimated Housing Supply (2020)		52,961	1,937	62	5,329	13,558	8,089	5,262	18,724	310	
Countywide Additional Units Needed (2020-2045)		17,452	2,864	1,610	2,868	2,504	1,340	1,190	5,076	285	
Sum of Allocation to Jurisdictions (from User Inputs)		17,451	2,864	1,610	2,868	2,504	1,340	1,190	5,076	284	

User Input - % Share of County Population Growth. Values must sum to 100%		100.00%	<-- Sum of user inputs for jurisdiction shares of county future net housing need. If below Met Target
			<-- Sum of user inputs for jurisdiction shares of county future net housing need. If below 100%, increase shares. If above 100%, decrease shares.

		Permanent Housing Needs by Income Level (% of Area Median Income)							Emergency Housing Needs (Temporary)	
		Total	0-30% Non-PSH	PSH	>30-50%	>50-80%	>80-100%	>100-120%	>120%	
35.60 %	Unincorporated Skagit County	21,467	683	0	2,205	4,009	2,523	2,436	9,611	0
	Allocation Method A (2020-2045)	6,213	1,020	573	1,021	891	477	424	1,807	101
14.70 %	Anacortes city	8,395	270	0	333	1,606	1,214	1,110	3,862	30
	Allocation Method A (2020-2045)	2,565	421	237	422	368	197	175	746	42
6.00 %	Burlington city	3,645	92	0	317	1,539	698	262	737	45
	Allocation Method A (2020-2045)	1,047	172	97	172	150	80	71	305	17
0.70 %	Concrete town	376	29	0	81	192	49	9	16	0
	Allocation Method A (2020-2045)	122	20	11	20	18	9	8	35	2
0.00 %	Hamilton town	131	4	0	22	42	22	8	33	0
	Allocation Method A (2020-2045)	0	0	0	0	0	0	0	0	0
0.60 %	La Conner town	557	38	0	29	127	128	56	179	0
	Allocation Method A (2020-2045)	105	17	10	17	15	8	7	31	2
0.00 %	Lyman town	173	4	0	16	49	46	12	46	0
	Allocation Method A (2020-2045)	0	0	0	0	0	0	0	0	0
27.50 %	Mount Vernon city	13,458	586	62	1,888	4,286	2,104	1,037	3,495	207
	Allocation Method A (2020-2045)	4,799	788	443	789	689	368	327	1,396	78
14.90 %	Sedro-Woolley city	4,759	231	0	438	1,708	1,305	332	745	28
	Allocation Method A (2020-2045)	2,600	427	240	427	373	200	177	756	42

The tool only produces allocations for cities, towns, and the unincorporated area (not UGAs).

The sum of all housing needs allocated to local jurisdictions in a county must be no less than the total projected countywide need.

This example uses each jurisdiction's share of Skagit County population growth from 2010 to 2020 to allocate the 17,452 net new housing units needed countywide (forecasted on page 5 based on the OFM medium population projection).

Source: Department of Commerce, Housing for All Planning Tool; Community Attributes, 2023. Example percentage distribution of growth by jurisdiction selected for illustration purposes only.

02 HOUSING ALL PLANNING TOOL OVERVIEW

Do you have any questions on the HAPT tool?

Future discussions will ask you to consider which HAPT allocation method is the most appropriate for Skagit County.

In this example, **under Method A**, 16% of Anacortes **net new housing need** of 2,565 is allocated to be at the 30-50% AMI level because 16% of the countywide net new housing need is at 30-50% AMI. **Under method B**, 12% of Anacortes **total housing need** of 10,960 units in 2045 (8,395 baseline units in 2020 + 2,565 growth target units) is allocated to be at the 30-50% AMI level because 12% of the countywide total net new housing need is at 30-50% AMI. Also under method B, in this case, there is a negative value for net new housing needed at >100% AMI, indicating that Anacortes already has more than enough housing affordable at those income categories for its 2045 targets.

Exhibit 4. Example HAPT Method A – Allocation for Anacortes (Growth Target =2,565)

Income Level (% of AMI)	Countywide Net New Housing Need (2020-2045)	% of Countywide Net New Housing Need (2020-2045)	Anacortes Net New Housing Need (2020-2045)
0-30%	4,474	26%	658
>30-50%	2,868	16%	422
>50-80%	2,504	14%	368
>80-100%	1,340	8%	197
>100-120%	1,190	7%	175
>120%	5,076	29%	746
Total	17,451	100%	2,565

Exhibit 5. Example HAPT Method B – Allocation for Anacortes (Growth Target =2,565)

Income Level (% of AMI)	Skagit County				Anacortes		
	Baseline units, 2020	Net New Housing Need (2020-2045)	Total Housing Need (2045)	% of Total Housing Need (2045)	Baseline Units, 2020	Total Housing Need (2045)	Net New Housing Need (2020-2045)
0-30%	1,999	4,474	6,473	9%	270	1,008	738
>30-50%	5,329	2,868	8,197	12%	333	1,276	943
>50-80%	13,558	2,504	16,062	23%	1,606	2,500	894
>80-100%	8,089	1,340	9,429	13%	1,214	1,468	254
>100-120%	5,262	1,190	6,452	9%	1,110	1,004	(106)
>120%	18,724	5,076	23,800	34%	3,862	3,705	(157)
Total	52,961	17,451	70,412	100%	8,395	10,960	2,565

Source: Department of Commerce, Housing for All Planning Tool; Community Attributes, 2023. Example based on OFM Medium scenario and 2010-2020 shares of population growth by jurisdiction which were selected for illustration purposes only.

03 COUNTYWIDE PROJECTIONS

Which geography should Skagit County use for the 2025-2045 growth projections, city boundaries or UGAs, and why?

Growth Projections and Allocations Assumptions

- **Countywide population projections must be within the range of OFM's Low, Medium, and High GMA Population Projection.**
- **Housing projections** will use the **Housing All Planning Tool (HAPT)**, published with guidance for the Department of Commerce in response to House Bill 1220.
- Projections must consider the Countywide Planning Policies (CPPs), including the **80/20 urban to rural split.**
- The forecast time period is **2025 through 2045** aligning with the comprehensive plan timeframe.

Projection Geography

- Previous projections allocated growth to Skagit County's 10 Urban Growth Areas (UGAs). **Skagit County and Cities and Towns can now review the geography for growth allocations and provide guidance.**
- UGAs include both city boundaries and the unincorporated portion of UGA. Currently 68% of Skagit County population resides within UGA boundaries, and 60% resides within city boundaries.

- Counties across the state use a variety of approaches. Some, like Skagit allocate by UGA, others allocate by city and UGA and others allocate to cities alone.
- GMA requires counties to designate urban growth areas based on population projections within the official OFM projection range (RCW 36.70A.110).
- **There are different policy implications for each geography.** Projections by city (or city with unincorporated UGA breakouts) allow each jurisdiction to designate UGA boundaries based on the capacity required to accommodate projected population, housing, and employment growth. Projections by UGA boundaries provide each jurisdiction with targets for the complete UGA for which urban services will be required.
- **The HAPT tool only projects for city boundaries,** due to data limitations for specific housing data. Analysis for UGAs will require model adjustments in consultation with the Department of Commerce.

03 COUNTYWIDE PROJECTIONS

Population and Housing Projections

Skagit County and cities and towns must select a population projection that falls within the range of the Washington State Office of Financial Management Low and High projections. The population projection will drive the housing projection developed in the HAPT tool. Exhibits 6 through 8 provide data on the following projections, all of which fall within the allowable range.

- **OFM High** – Provides the high range of the OFM 2022 projections, reflecting uncertainty regarding growth and based on historic high migration patterns and current factors affecting the economic base and attractiveness of the county.
- **30-Year Historical CAGR** – Forecasts population growth based on historical patterns, by applying the observed 30-year compound annual growth rate of 1.5% from 2023 to 2045.
- **CPP 2036 Projection** – Comparison forecast to the previously adopted Countywide Planning Policy (CPP) 20-year forecast. The CPP 2036 projection is carried forward by assuming the same compound annual growth rate of 1.3% between 2015 and 2036 continues to 2045.
- **30-Year Linear Trend** – Linear forecast generated based

on the past 30 years of historical population data.

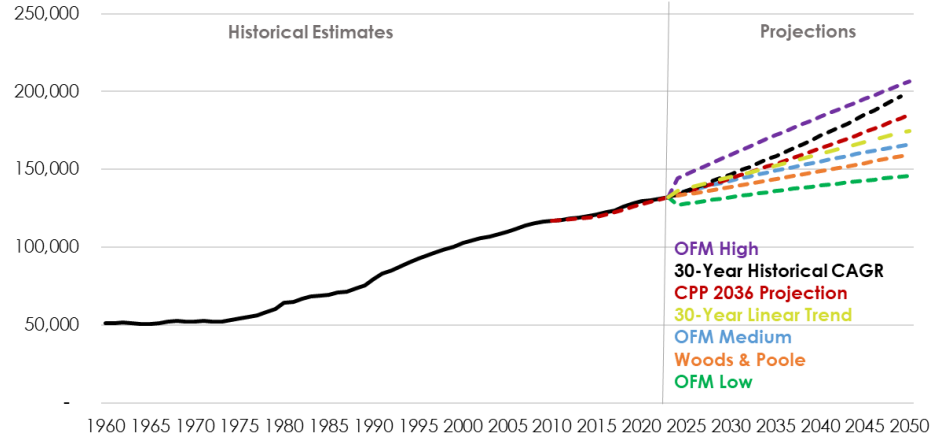
- **OFM Medium** – Presents the OFM Medium scenario, which is considered most likely to occur based on current information and trends.
- **Woods & Poole** – Provides estimates derived from independent consulting firm estimates of population growth for Skagit County. Population projections follow a traditional cohort-component analysis based on calculated fertility and mortality in each county, and migration patterns which are based on employment opportunities and historical population growth.
- **OFM Low** – Presents the low range of the OFM 2022 projections.

The HAPT tool forecasts total housing need and housing growth using the selected population projections combined with data on:

- Assumed group quarter population
- Average household size
- Assumed vacancy
- 2020 estimated housing units excluding recreational and migrant housing

03 COUNTYWIDE PROJECTIONS

Exhibit 6. Historic Estimates and Projected Population, Skagit County, 1960-2045



Projection	2025	2045	Population Growth, 2025-2045	Average Annual Growth	CAGR, 2025-2045
OFM High	146,910	195,316	48,406	2,420	1.4%
30-Year Historical CAGR	136,115	185,018	48,904	2,445	1.5%
CPP 2036 Projection	135,564	173,876	38,311	1,916	1.3%
30-Year Linear Trend	137,610	167,423	29,813	1,491	1.0%
OFM Medium	136,028	160,830	24,802	1,240	0.8%
Woods & Poole	133,965	154,113	20,148	1,007	0.7%
OFM Low	127,866	142,840	14,974	749	0.6%

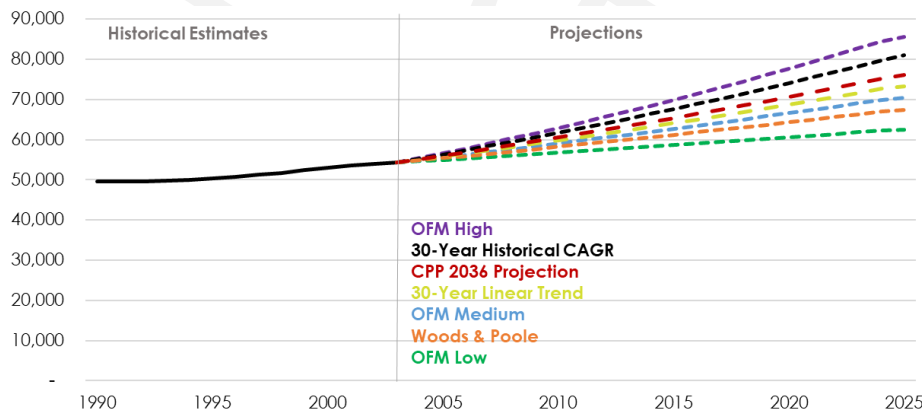
- **Actual countywide population growth was mostly in line with the CPP 2036 Projections.** The population growth rate between 2015 and 2022 was 1.1%, which is 0.2% lower than the forecasted rate for that period.
- 2045 population must fall within the range of **142,840 to 195,316** set by the 2022 OFM projections. This represents net population growth ranging from 14,974 to 48,406 from 2025 to 2045.
- In terms of growth rate, the **30-year Historical CAGR scenario projects the highest compound annual average growth rate** between 2025 and 2045 at 1.5%, which is 0.1% higher than the OFM High growth rate.
- The **OFM Medium scenario projects a growth rate of 0.8%** and growth in population of 24,802, reaching total population of 160,830 in 2045.
- The **CPP 2036 Projection**, which was based on the previous OFM Medium 2012 projections, **estimates a 1.3% annual average growth rate, less than the 0.8% growth rate of the current OFM Medium 2022 projections.**

Source: OFM, *Intercensal Estimates of April 1 Population for the State and Counties, 1960-2020; Postcensal Estimates of April 1 Population, 1960 to Present; 2022 GMA Projections; Skagit County Countywide Planning Policies, 2021; Woods & Poole, 2023; Community Attributes, 2023.*

Note: OFM provides population projections from 2025 to 2050. 2024 population is projected based on 2025 to 2026 growth rates from OFM population projections.

03 COUNTYWIDE PROJECTIONS

Exhibit 7. Historic Estimates and Projected Housing Units (Excludes Temporary Housing), Skagit County, 2010-2045



Projection	2025	2045	Unit Growth, 2025-2045	Average Annual Growth	CAGR, 2025-2045
OFM High	56,607	85,511	28,904	1,445	2.1%
30-Year Historical CAGR	56,297	81,003	24,706	1,235	1.8%
CPP 2036 Projection	55,981	76,125	20,144	1,007	1.5%
30-Year Linear Trend	55,798	73,299	17,501	875	1.4%
OFM Medium	55,595	70,413	14,818	741	1.2%
Woods & Poole	55,370	67,472	12,102	605	1.0%
OFM Low	54,984	62,537	7,553	378	0.6%

Source: Department of Commerce, HAPT, March 1, 2023; OFM, Intercensal Estimates of April 1 Housing Units for the State and Counties, 1990-2020; Postcensal Estimates of April 1 Housing Units, 1990 to Present; Skagit County Countywide Planning Policies, 2021; Woods & Poole, 2023; U.S. Census ACS 5-Year Average, 2023; Community Attributes, 2023.

- Housing projections are developed using the Commerce HAPT tool and each population projection scenario, excluding the CPP.
- The Commerce HAPT tool housing projections **exclude recreational and migrant housing units**, which were on average about 2,600 units across Skagit County between 2010 and 2021.
- The **minimum and maximum range for the housing projections** are the OFM Low and High projections, between **62,537 and 85,511 housing units** by 2045.
- The **30-Year Historical Trend** population scenario results in 80,330 projected housing units by 2045 across Skagit County, or net growth of 24,079 housing units at a rate of 1.8% per year from 2025 to 2045.
- The **OFM Medium** population projection results in housing unit net growth of 14,818 at a rate of 1.2% annually, reaching total housing units of 70,413 by 2045.
- As a comparison, **housing units in Skagit County** have **increased by 1.6% per year on average in the past 30 years** and **0.8% in the last decade**.

Note: The Commerce HAPT tool provides housing projections for every year from 2044 to 2050. Annual housing projections between 2020 and 2044 are derived by applying the 2020 to 2044 CAGR starting in 2020.

03 COUNTYWIDE PROJECTIONS

Exhibit 8. Population and Housing Unit Projections, Skagit County, 2025 and 2045

Projection	Population				Housing Units			
	2025	2045	Growth, 2025-2045	CAGR, 2025-2045	2025	2045	Growth, 2025-2045	CAGR, 2025-2045
OFM High	146,910	195,316	48,406	1.4%	56,607	85,511	28,904	2.1%
30-Year Historical CAGR	136,115	185,018	48,904	1.5%	56,297	81,003	24,706	1.8%
CPP 2036 Projection	135,564	173,876	38,311	1.3%	55,981	76,125	20,144	1.5%
30-Year Linear Trend	137,610	167,423	29,813	1.0%	55,798	73,299	17,501	1.4%
OFM Medium	136,028	160,830	24,802	0.8%	55,595	70,413	14,818	1.2%
Woods & Poole	133,965	154,113	20,148	0.7%	55,370	67,472	12,102	1.0%
OFM Low	127,866	142,840	14,974	0.6%	54,984	62,537	7,553	0.6%

Source: OFM, *Intercensal Estimates of April 1 Population for the State and Counties, 1960-2020*; *Postcensal Estimates of April 1 Population, 1960 to Present*; *Intercensal Estimates of April 1 Housing Units for the State and Counties, 1990-2020*; *Postcensal Estimates of April 1 Housing Units, 1990 to Present*; *Skagit County Countywide Planning Policies, 2021*; *Woods & Poole, 2023*; *U.S. Census ACS 5-Year Average, 2023*; *Department of Commerce, HAPT, March 1, 2023*; *Community Attributes, 2023*.
 Note: For population projections, OFM provides projections from 2025 to 2050. 2024 population is projected based on 2025 to 2026 growth rates from OFM population projections. The Commerce HAPT tool provides housing projections for every year from 2044 to 2050. Annual housing projections between 2020 and 2044 are derived by applying the 2020 to 2044 CAGR starting in 2020.

Which countywide population projection should be selected for growth allocations?

Which countywide housing unit projection should be selected for growth allocations?

- Population projections drive housing unit projections through the HAPT tool.
- Housing projections result in slightly higher growth rates compared to population growth rates.
- These projections provide a range of alternatives bounded within the official OFM projections. Skagit County and cities and towns may choose a different projection than those presented here, if there is a different preferred alternative.

03 COUNTYWIDE PROJECTIONS

Employment Projections

Skagit County and cities and towns must select an employment forecast. However, the State of Washington does not produce official forecasts of employment for comprehensive plan targets. Exhibit 9 presents a range of projections based on available historic data and other forecasts sources.

- **CPP 2036 Projection** – Comparison forecast to the previously adopted Countywide Planning Policy 20-year forecast, extrapolated through 2045.
- **30-Year Historical Trend** – Forecasts employment growth based on historical patterns, extrapolated based on the 30-year historic compound annual growth rate. An alternative may be developed using a linear forecast calculation.
- **ESD Projection** – Presents employment growth based on the Washington State Employment Security Department (ESD) projection for the Northwest Region of Washington, which includes Island, San Juan, Skagit, and Whatcom counties. The projection extrapolates growth through 2045 based on the 2020-2025 and 2025-2030 projected compound annual growth rates. An alternative may be developed by combining historic industry growth for each

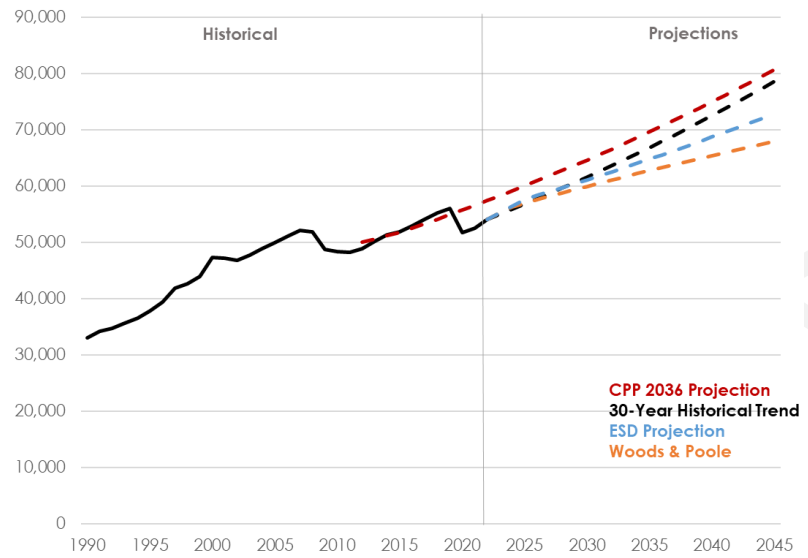
county and the ESD projections for the region.

- **Woods & Poole** – Provides estimates derived from independent consulting firm estimates of employment growth for Skagit County.

03 COUNTYWIDE PROJECTIONS

Which employment projection should be selected for growth allocations?

Exhibit 9. Historic Estimates and Projected Employment, Skagit County, 1990-2045



Projection	2025	2045	Employment Growth 2025-2045	CAGR 2025-2045
CPP 2036 Projection	60,000	80,700	20,700	1.5%
30-Year Historical Trend	56,800	78,600	21,800	1.6%
ESD Projection	57,600	72,800	15,200	1.2%
Woods & Poole	56,900	68,000	11,100	0.9%

- The State of Washington does not produce official employment forecasts for comprehensive planning growth targets.
- Exhibit 9 presents three alternative forecasts and the extended CPP 2036 adopted projections for comparison.
- These forecasts range between 68,000 to 78,600 jobs in Skagit County by 2045, with growth between 11,100 and 21,800, at growth rates between 0.9% and 1.6% annually.
- The 30-Year Historic Trend has a slightly more aggressive growth rate compared to the previously adopted employment target. ESD projects slightly more conservative growth at 1.2% annually.
- Actual countywide employment growth was mostly in line with the CPP 2036 projections until 2020. The COVID-19 pandemic resulted in an overall decline of -7.7% year of year between 2019 and 2020. Employment nearly recovered to pre-pandemic levels as of 2022 and year over year growth was 1.6% in 2021 and 2.9% in 2022.

Source: Bureau of Labor Statistics Quarterly Census of Employment and Wages, 2023; Bureau of Labor Statistics Current Employment Statistics, 2023; Bureau of Economic Analysis Total Employment, 2023; Employment Security Department Long-Term Industry Projections; 2023; Woods & Poole, 2023; Community Attributes, 2023.

04 SUMMARY AND DISCUSSION

Summary

This document provides background information and context to inform a broader discussion of the methods and data used to forecast future growth in population, housing units, and employment in Skagit County.

Discussion during the August 10 workshop will also address growth trends and capacity concerns on a jurisdiction-by-jurisdiction basis. Please come prepared to discuss the following questions.

Discussion Questions

- Do you have any questions on the HAPT tool?
- Which geography should Skagit County use for the 2025-2045 growth projections, city boundaries or UGAs, and why?
- Which countywide population projection should be selected for growth allocations?
- Which countywide housing unit projection should be selected for growth allocations?

- Which employment projection should be selected for growth allocations?
- Where has growth been occurring in your jurisdiction?
- Where are there capacity constraints for growth and what are those constraints?

Key Decision Points

The key decision points that Skagit County and each city and town will need to provide direction on at the August 10 workshop include:

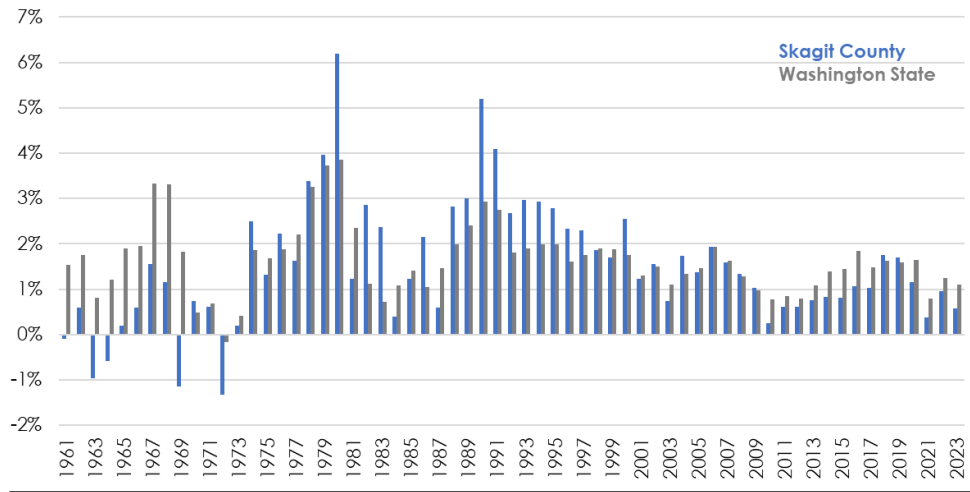
- Projection geography, UGA or City boundaries
- Countywide population projection
- Countywide housing unit projection
- Countywide employment projection

APPENDIX:

ADDITIONAL HISTORIC POPULATION,
HOUSING UNIT AND EMPLOYMENT DATA

05 APPENDIX

Exhibit 10. Historic Population Growth, YoY Change, Skagit County and Washington State, 1960-2023



	Skagit County		Washington State	
	Average Annual Growth	CAGR	Average Annual Growth	CAGR
50-Yr Trend (1970-2023)	1,502	1.8%	85,621	1.6%
30-Yr Trend (1990-2023)	1,590	1.5%	93,469	1.5%

Source: OFM, Intercensal Estimates of April 1 Population for the State and Counties, 1960-2020; Postcensal Estimates of April 1 Population, 1960 to Present; Community Attributes, 2023.

- Skagit County population experienced a **higher-than-average pace of growth in the second half of the 1970s and from 1988 to 2000.**
- **Countywide population growth slowed down** after 2000, most recently to 0.6% per year on average (2020-2023), reflecting the general economic slowdown from the pandemic.
- The county added almost 80,000 residents since 1970, or **an average of 1,500 people per year.**

05 APPENDIX

Exhibit 11. Historic Population by Urban Growth Area and Rural Areas, 2000 - 2022

	Population			CAGR		
	2000	2010	2022	2000-2010	2010-2022	2000-2022
Urban Growth Areas						
Mount Vernon	28,430	33,672	37,679	1.7%	0.9%	1.3%
Anacortes	14,671	15,861	17,983	0.8%	1.1%	0.9%
Sedro-Woolley	10,428	12,335	14,096	1.7%	1.1%	1.4%
Burlington	8,482	10,312	12,111	2.0%	1.3%	1.6%
Swinomish	2,247	2,470	2,565	1.0%	0.3%	0.6%
Bayview Ridge	1,736	1,798	1,694	0.4%	-0.5%	-0.1%
La Conner	765	891	980	1.5%	0.8%	1.1%
Concrete	930	866	949	-0.7%	0.8%	0.1%
Lyman	411	438	425	0.6%	-0.3%	0.2%
Hamilton	318	308	302	-0.3%	-0.2%	-0.2%
UGAs Subtotal	68,417	78,951	88,785	1.4%	1.0%	1.2%
Rural (outside UGAs)	34,562	37,950	42,465	0.9%	0.9%	0.9%
Total Skagit County	102,979	116,901	131,250	1.3%	1.0%	1.1%

Source: OFM, Small Area Estimate Program (SAEP), Estimates of Total Population for Census 2010 Urban Growth Areas, 2019; Estimates of Total Population for Census 2020 Urban Growth Areas, 2022; OFM, Intercensal Estimates of April 1 Population for the State and Counties, 1960-2020; Postcensal Estimates of April 1 Population, 1960 to Present; Community Attributes, 2023.
 Note: 2000 and 2010 population are based on 2010 boundaries, while 2022 population is based on 2020 boundaries.

- **Most UGAs** that experienced a population increase from 2000 to 2022 **grew faster in the 2000s than in the 2010s.**
- The **fastest growing UGA** since 2000, in terms of compound **annual growth rate**, has been **Burlington.**
- In terms of **absolute population growth**, **Mount Vernon** added the most residents (more than 9,200) since 2000.
- The **overall growth rate for UGAs outpaced growth in rural areas** (outside UGAs) throughout the entire period from 2000 to 2022.

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Exhibit 12. Share of Population by Urban Growth Area and Outside UGAs, 2000 – 2022

	Share of Population			Share of Population Growth		
	2000	2010	2022	2000-2010	2010-2022	2000-2022
Urban Growth Areas						
Mount Vernon	27.6%	28.8%	28.7%	37.7%	27.9%	32.7%
Anacortes	14.2%	13.6%	13.7%	8.5%	14.8%	11.7%
Sedro-Woolley	10.1%	10.6%	10.7%	13.7%	12.3%	13.0%
Burlington	8.2%	8.8%	9.2%	13.1%	12.5%	12.8%
Swinomish	2.2%	2.1%	2.0%	1.6%	0.7%	1.1%
Bayview Ridge	1.7%	1.5%	1.3%	0.4%	-0.7%	-0.1%
La Conner	0.7%	0.8%	0.7%	0.9%	0.6%	0.8%
Concrete	0.9%	0.7%	0.7%	-0.5%	0.6%	0.1%
Lyman	0.4%	0.4%	0.3%	0.2%	-0.1%	0.0%
Hamilton	0.3%	0.3%	0.2%	-0.1%	0.0%	-0.1%
UGAs Subtotal	66.4%	67.5%	67.6%	75.7%	68.5%	72.0%
Rural (outside UGAs)	33.6%	32.5%	32.4%	24.3%	31.5%	28.0%
Total Skagit County	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Source: OFM, Small Area Estimate Program (SAEP), Estimates of Total Population for Census 2010 Urban Growth Areas, 2019; Estimates of Total Population for Census 2020 Urban Growth Areas, 2022; OFM, Intercensal Estimates of April 1 Population for the State and Counties, 1960-2020; Postcensal Estimates of April 1 Population, 1960 to Present; Community Attributes, 2023.
 Note: 2000 and 2010 shares of population are based on 2010 boundaries, while 2022 population is based on 2020 boundaries.

- Overall, **UGAs captured a smaller share of growth from 2010-2022** than from 2000-2010.
- As a result, **UGAs increased their share of countywide population from 2000 to 2010** but the share has remained mostly unchanged between 2010-2022.
- Only a few UGAs have **increased their share of countywide population** since 2000: **Burlington, Mount Vernon, and Sedro-Woolley.**
- **Anacortes** has seen the **largest increase in the share of countywide population growth in the 2010-2022** decade compared to the 2000s.

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Exhibit 13. Observed vs 2036 CPP Forecasted Growth, Urban Growth Areas and Rural Areas, 2015, 2022 and 2036

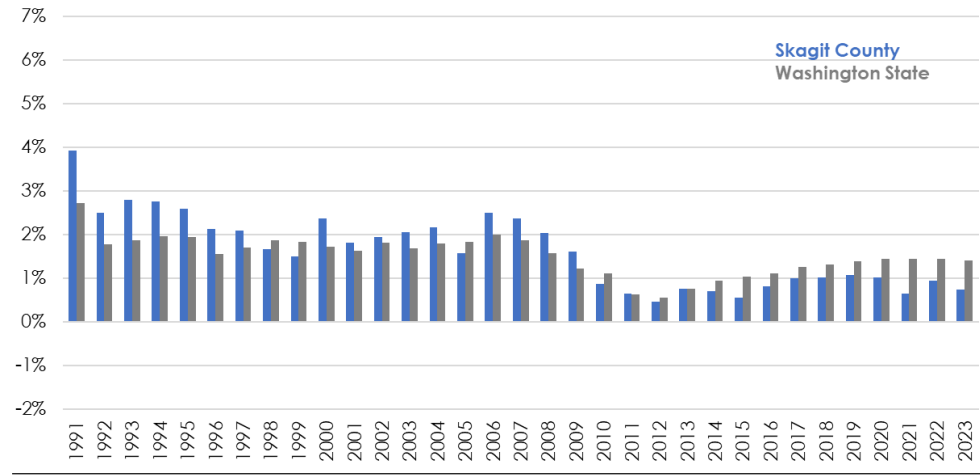
	2015	2022	2036	2015-2022 Observed CAGR	2015-2022 Forecast CAGR	Difference	Share of Growth (2015-2022)
Urban Growth Areas							
Mount Vernon	35,490	37,679	47,403	0.9%	1.5%	-0.6%	21.7%
Anacortes	16,394	17,983	22,293	1.3%	1.5%	-0.1%	15.8%
Sedro-Woolley	12,483	14,096	17,069	1.8%	1.5%	0.3%	16.0%
Burlington	10,420	12,111	14,272	2.2%	1.5%	0.7%	16.8%
Swinomish	2,521	2,565	3,416	0.2%	1.5%	-1.2%	0.4%
Bayview Ridge	1,817	1,694	1,883	-1.0%	0.2%	-1.2%	-1.2%
La Conner	895	980	1,226	1.3%	1.5%	-0.2%	0.8%
Concrete	891	949	1,193	0.9%	1.5%	-0.6%	0.6%
Lyman	445	425	605	-0.7%	1.5%	-2.1%	-0.2%
Hamilton	312	302	427	-0.5%	1.5%	-2.0%	-0.1%
UGAs Subtotal	81,669	88,785	109,787	1.2%	1.4%	-0.2%	70.6%
Rural (outside UGAs)	39,497	42,465	45,665	1.0%	0.8%	0.2%	29.4%
Total Skagit County	121,166	131,250	155,452	1.1%	1.3%	-0.1%	100.0%

Source: OFM, Small Area Estimate Program (SAEP), Estimates of Total Population for Census 2010 Urban Growth Areas, 2019; Estimates of Total Population for Census 2020 Urban Growth Areas, 2022; OFM, Intercensal Estimates of April 1 Population for the State and Counties, 1960-2020; Postcensal Estimates of April 1 Population, 1960 to Present; Community Attributes, 2023.

- For most UGAs, **observed population growth rates from 2015 to 2022 were smaller than 2036 CPP forecasted growth rates.**
- The population of **Hamilton, Lyman, and Bayview Ridge** was **forecasted to increase** but **experienced a decrease** in population from 2015 to 2022.
- Only **Burlington** and **Sedro-Woolley** **grew faster than projected** between 2015 and 2022.
- Between 2015 and 2022, **70.6% of growth has occurred within Skagit's UGAs.**

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Exhibit 14. Historic Housing Unit Growth, YoY Change, Skagit County and Washington State, 1990-2023



- Until 2010, Skagit County tended to see **greater year-over-year growth in housing units than the state overall.**
- Growth in housing units **slowed through the 2010s**, and the county’s year-over-year growth has remained lower than the state in recent years.
- The county **added more than 23,000 housing units since 1990**, or an average of **700 units per year.**

	Skagit County		Washington State	
	Average Annual Growth	CAGR	Average Annual Growth	CAGR
30-Yr Trend (1990-2023)	711	1.6%	39,676	1.5%
10-Yr Trend (2010-2023)	429	0.8%	34,976	1.1%

Source: OFM, *Intercensal Estimates of April 1 Housing Units for the State and Counties, 1990-2020*; *Postcensal Estimates of April 1 Housing Units, 1990 to Present*; *Community Attributes, 2023*.

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Exhibit 15. Historic Total Housing Units by Urban Growth Area and Outside UGAs, 2000 - 2022

	Housing Units			CAGR		
	2000	2010	2022	2000-2010	2010-2022	2000-2022
Urban Growth Areas						
Mount Vernon	10,582	12,851	14,380	2.0%	0.9%	1.4%
Anacortes	6,605	7,721	8,554	1.6%	0.9%	1.2%
Sedro-Woolley	3,994	4,875	5,498	2.0%	1.0%	1.5%
Burlington	3,190	4,121	4,743	2.6%	1.2%	1.8%
Swinomish	1,130	1,330	1,308	1.6%	-0.1%	0.7%
Bayview Ridge	726	762	746	0.5%	-0.2%	0.1%
La Conner	435	526	565	1.9%	0.6%	1.2%
Concrete	394	439	457	1.1%	0.3%	0.7%
Lyman	173	172	174	0.0%	0.1%	0.0%
Hamilton	139	143	131	0.3%	-0.7%	-0.3%
UGAs Subtotal	27,369	32,940	36,555	1.9%	0.9%	1.3%
Rural (outside UGAs)	15,312	18,533	20,073	1.9%	0.7%	1.2%
Total Skagit County	42,681	51,473	56,628	1.9%	0.8%	1.3%

Source: OFM, Intercensal Estimates of April 1 Housing Units for the State and Counties, 1990-2020; Postcensal Estimates of April 1 Housing Units, 1990 to Present; Community Attributes, 2023.
 Note: 2015 shares of housing units are based on 2010 boundaries, while 2022 housing units is based on 2020 boundaries.

- Aligning with population trends, **most UGAs** that experienced a housing unit increase from 2000 to 2022 **grew faster in the 2000s than in the 2010s**.
- The **fastest growing UGA** since 2000, in terms of compound **annual growth rate**, has been **Burlington**.
- In terms of **absolute housing unit growth**, **Mount Vernon** added the most units (more than 3,700) since 2000.
- The **overall growth rate for UGAs slightly outpaced growth in rural areas** (outside UGAs) throughout the entire period from 2000 to 2022, though growth rates are generally more aligned for housing units compared to population.

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Exhibit 16. Shares of Total Housing Units by Urban Growth Area and Outside UGAs, 2000 – 2022

	Share of Housing Units			Share of Unit Growth		
	2000	2010	2022	2000-2010	2010-2022	2000-2022
Urban Growth Areas						
Mount Vernon	24.8%	25.0%	25.4%	25.8%	29.7%	27.2%
Anacortes	15.5%	15.0%	15.1%	12.7%	16.2%	14.0%
Sedro-Woolley	9.4%	9.5%	9.7%	10.0%	12.1%	10.8%
Burlington	7.5%	8.0%	8.4%	10.6%	12.1%	11.1%
Swinomish	2.6%	2.6%	2.3%	2.3%	-0.4%	1.3%
Bayview Ridge	1.7%	1.5%	1.3%	0.4%	-0.3%	0.1%
La Conner	1.0%	1.0%	1.0%	1.0%	0.8%	0.9%
Concrete	0.9%	0.9%	0.8%	0.5%	0.3%	0.4%
Lyman	0.4%	0.3%	0.3%	0.0%	0.0%	0.0%
Hamilton	0.3%	0.3%	0.2%	0.0%	-0.2%	-0.1%
UGAs Subtotal	64.1%	64.0%	64.6%	63.4%	70.1%	65.9%
Rural (outside UGAs)	35.9%	36.0%	35.4%	36.6%	29.9%	34.1%
Total Skagit County	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Source: OFM, Intercensal Estimates of April 1 Housing Units for the State and Counties, 1990-2020; Postcensal Estimates of April 1 Housing Units, 1990 to Present; Community Attributes, 2023.
 Note: 2015 shares of housing units are based on 2010 boundaries, while 2022 housing units is based on 2020 boundaries.

- Overall, **UGAs captured share of housing units relative to rural areas remained relatively stable from 2000-2022.**
- Only a few UGAs have **increased their share of countywide housing units** since 2000: **Burlington, Mount Vernon, and Sedro-Woolley.**
- **Mount Vernon** has seen the **largest increase in the share of countywide housing unit growth in the 2010-2022** decade compared to the 2000s.

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Exhibit 17. Observed Growth, Urban Growth Areas and Rural Areas, 2015 and 2022

	2015	2022	2015-2022 Observed CAGR	Share of Growth (2015-2022)
Urban Growth Areas				
Mount Vernon	13,508	14,380	0.9%	24.7%
Anacortes	7,916	8,554	1.1%	18.1%
Sedro-Woolley	4,902	5,498	1.7%	16.9%
Burlington	4,153	4,743	1.9%	16.7%
Swinomish	1,335	1,308	-0.3%	-0.8%
Bayview Ridge	763	746	-0.3%	-0.5%
La Conner	530	565	0.9%	1.0%
Concrete	427	457	1.0%	0.8%
Lyman	175	174	-0.1%	0.0%
Hamilton	144	131	-1.3%	-0.4%
UGAs Subtotal	33,852	36,555	1.1%	76.5%
Rural (outside UGAs)	19,243	20,073	0.6%	23.5%
Total Skagit County	53,095	56,628	0.9%	100.0%

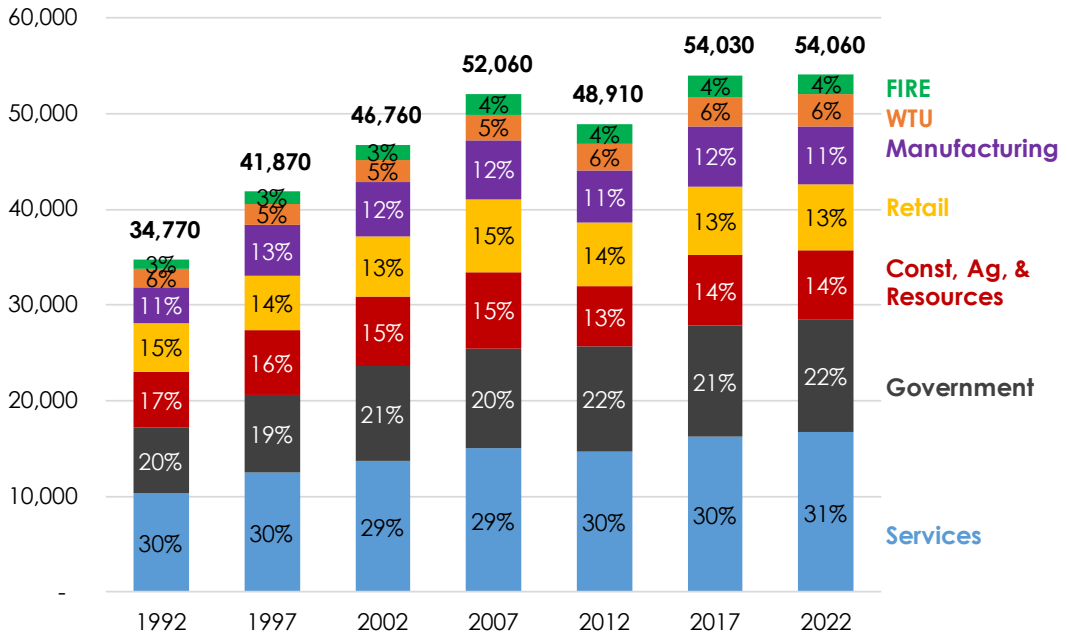
Source: OFM, Intercensal Estimates of April 1 Housing Units for the State and Counties, 1990-2020; Postcensal Estimates of April 1 Housing Units, 1990 to Present; Community Attributes, 2023.

Note: 2015 shares of housing units are based on 2010 boundaries, while 2022 housing units is based on 2020 boundaries.

- While **Anacortes ranks fourth** among UGAs by **share of population growth** from 2015-2022, it ranks **third** in terms of **housing unit growth**.
- **Swinomish** is the **only UGA** with an observed 2015-2022 observed CAGR that is **negative for housing** units and **positive for population**
- Between 2015 and 2022, **76.5% of housing growth has occurred within Skagit's UGAs**.

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Exhibit 18. Historic Skagit County Employment by Industry, 1992 - 2022



Source: Bureau of Labor Statistics Quarterly Census of Employment and Wages, 2023; Bureau of Labor Statistics Current Employment Statistics, 2023; Bureau of Economic Analysis Total Employment, 2023; Community Attributes, 2023.

- **Total employment has grown** every year in Skagit County between 1990 and 2022 except 2001-2002, 2008-2011 and 2020.
- **Industries with the strongest growth** between 2010 and 2022 include **Warehousing, Transportation and Utilities (WTU); Construction, Agriculture and Resources; and Manufacturing.**
- Every industry **declined in 2020** due to the impacts of the **COVID-19 pandemic.**
- Industries with the **strongest recovery between 2020 and 2022** include **Construction, Agriculture and Resources and Warehousing, Transportation and Utilities.**