

Coordinated Population Forecast



2021

Through

2071

**Lane
County**

Urban Growth
Boundaries (UGB)
& Area Outside UGBs

Photo Credit: Gary Halvorson, August 2005.

[https://commons.wikimedia.org/wiki/File:Three Sisters Mountains \(Lane County, Oregon scenic images\) \(lanD0014\).jpg](https://commons.wikimedia.org/wiki/File:Three_Sisters_Mountains_(Lane_County,_Oregon_scenic_images)_ (lanD0014).jpg)

**Coordinated Population Forecast for Lane County, its Urban Growth
Boundaries (UGB), and Area Outside UGBs**

2021 – 2071

Prepared by

Population Research Center

College of Urban and Public Affairs

Portland State University

June 30, 2021

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How to Read this Report

This report should be read with reference to the documents listed below, which are downloadable on the Forecast Program website (<https://www.pdx.edu/population-research/population-forecasts>).

- *Methods and Data for Developing Coordinated Population Forecasts*: Provides a detailed description and discussion of the forecast methods employed. This document also describes the assumptions that feed into these methods and determine the forecast output.
- *Forecast Tables*: Provides complete tables of population forecast numbers by county and all sub-areas within each county for each five-year interval of the forecast period (2021-2071).

***Note: This is a corrected version of the final report for Lane County published on June 30, 2021. The original final report left out the survey responses from the City of Eugene in the Appendix A, even though the responses were cited in the report. The survey responses from the City of Eugene are included as a part of the Appendix A in this corrected version.**

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1. Methodology

The cohort component model and housing unit method were used for the population forecast. Details are described in the methodology document posted on the Population Research Center's website.

1.1 Data and Assumptions

This section lists the source of data and assumptions applied to the forecast.

1. Fertility and mortality:
 - a) Deaths and survival rates were projected based on historical trends (2000-2019) and based on the methodology published by Clark and Sharrow 2011¹. Mortality rates for the 85+ age group were further divided into 5-year age groups up to 100+.
 - b) We applied some constraints to ensure the number of deaths maintain in a reasonable range as the elderly populations grow, accounting for positive factors associated with life expectancy (e.g., advanced medical treatments, life-style changes).
 - c) Fertility rates were projected based on historical trend up to 2030 and remain constant afterwards.
 - d) Births and deaths were estimated for the year 2020 and 2021 to account for the events that take place between July 2019 and July 2022. The 2020 preliminary data from the Oregon Health Authority (OHA) was used at the time of this report.
2. Net migration rates were based on the data published by the University of Wisconsin-Madison for 2000-2010, with minor adjustments made based on the following assumptions:
 - a) In/out migration would gradually approach zero for populations over 65, assuming there is minimal moving for people as they approach the age of 85+.
 - b) Considered and mitigated the uncertainties of in/out migration among college students when applicable.
 - c) Considered the impacts associated with the COVID-19 pandemic that has been taking place since March 2020. Assumptions were made based on the differences between the 2019 and 2020 net migration data. Details are described in the methodology documentation.
3. Populations in sub-areas were forecasted using the housing unit method based on survey responses and historical pattern.
4. COVID-19 Impacts:
 - a) COVID-19 impacts on the components of population were not incorporated in the forecast because they are considered as short-term and temporary impacts that do not expect to post significantly influence the long-term population trends.
 - b) The impacts are reflected for the years 2020 and 2021 in some individual figures related to the population components (e.g., births and deaths, net migration) for illustration purpose. The 2020 and 2021 estimates shown in the historical figures are preliminary and may change when the data are finalized by the organizations that produce them.

¹ <https://csss.uw.edu/research/working-papers/contemporary-model-life-tables-developed-countries-application-model-based>

2. County Summary

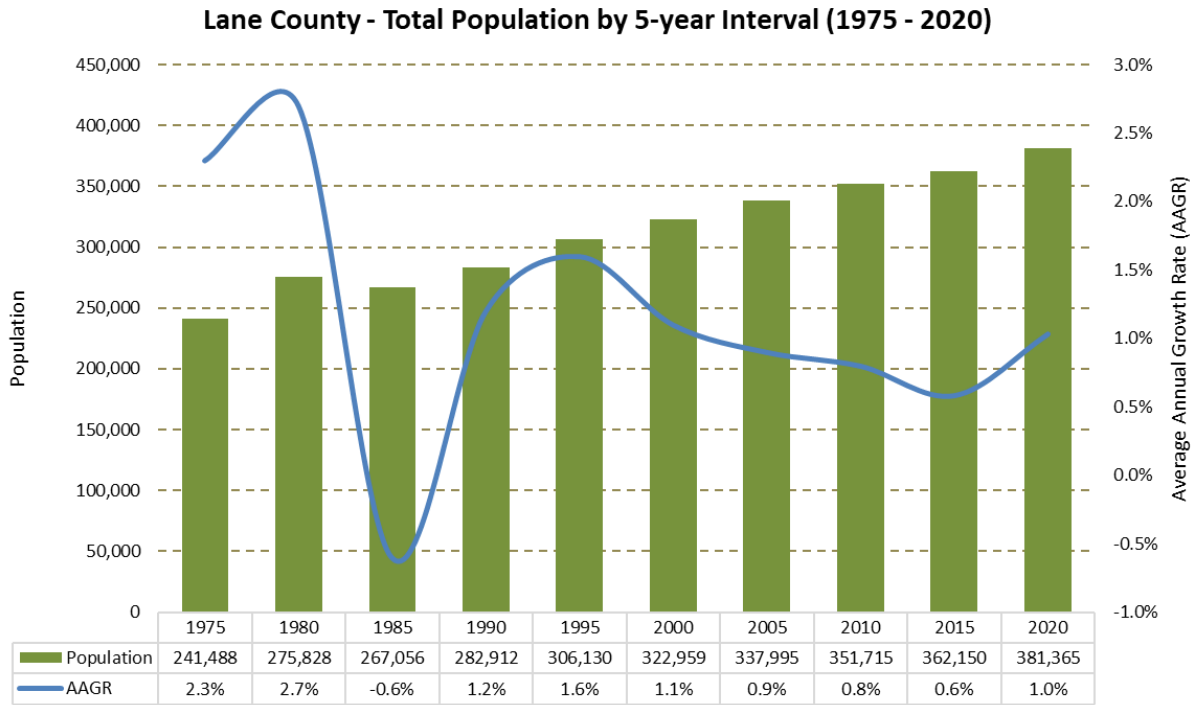
Lane County's growth centers around the Eugene/Springfield metropolitan statistical area (MSA). According to the 2019 American Community Survey (ACS), Eugene has 74,000 housing units. Eugene approved 3.8 thousand units over the last four years, with at least 830 under construction in 2019 and 2020 (1.1% of total stock). Springfield has an estimated 25 thousand housing units, as well as 990 units in the 5-year pipeline with 120 more in site planning. If all units materialize, there will be at least 1% AAGR in the housing stock.

The University of Oregon is a key economic player and growth driver and contributed a large student population within the county. Eugene and Springfield support the region's economy, while significant traded-sector job growth is rarely cited in responses from smaller cities. Both Eugene and Springfield expect their economic bases to grow as the University of Oregon is ramping up a science business incubator that expect to add 700+ jobs. Although manufacturing losses sustained in recent decades, Eugene expects to add 300 manufacturing jobs back now that one large vacant industrial complex has been purchased by a new company. Springfield expects job growth at Pacific Insurance, local healthcare providers, Wayfair, and potentially Royal Caribbean. These student/job gains drive population growth pressure in Eugene/Springfield and the broader area, as seen in sustained development activity. Nearly all cities within 30 minutes cite tight housing markets and low vacancy (e.g., Coburg, Lowell, Creswell, and Junction City) based on the general surveys collected by the PRC (Appendix A). Some cities have adopted policies that somewhat support housing growth, but some communities do not expect significant growth (e.g., Coburg and Dunes City).

3. Historical Trend and Population Forecast

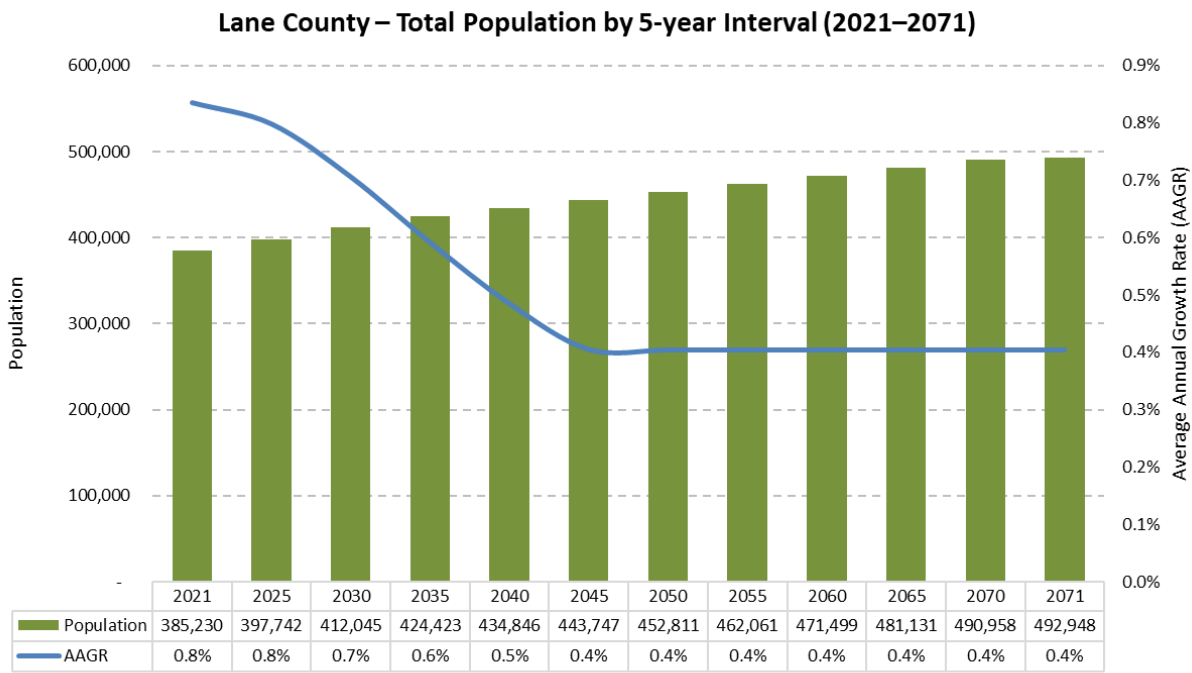
3.1 County Population

Historical data showed that Lane County population increased from 241,488 in 1975 to 381,365 in 2020, indicating a 58% increase in 45 year (Figure 1). Over the period from 1975 to 2020, the AAGR varied and reached a peak in 1980 at 2.7%. As shown in Figure 2, Lane County's population is projected to continue to grow throughout the forecast period, reaching 490,958 in 2070. The anticipated AAGR reaches 0.8% between 2021 and 2025 and the growth rate declines to about 0.4% by 2045. Recent trend showed the county-wide population growth rate varied between 0.6% to 1.1% since 2000, while the forecast indicates the growth rate remains under 1% in the next 50 years.



Source: U.S. Census Bureau, 1980, 1990, 2000, and 2010 census; PRC Annual Estimates, 1975, 1985, 1995, 2005, 2015, and 2020.

Figure 1. Historical total county population and AAGR, 1975-2020.



Source: Forecast by Population Research Center (PRC).

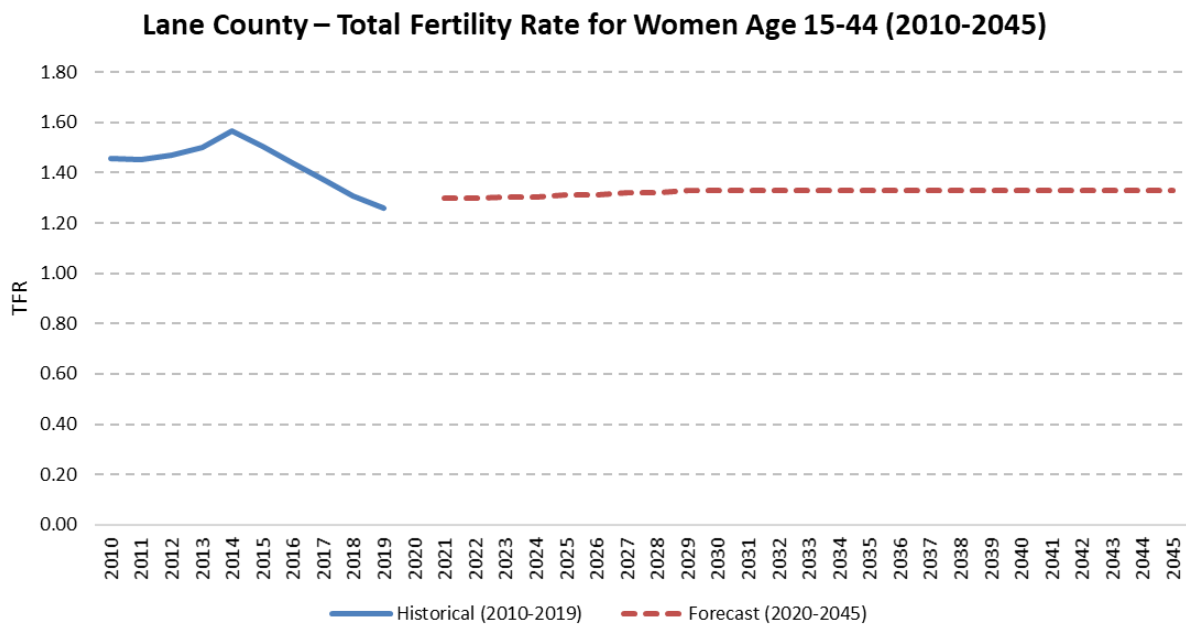
Figure 2. Forecasted total county population and AAGR, 2021-2071.

3.2 Births and Deaths

The total fertility rate (TFR) is shown in Figure 3. For women aged 15-44, the TFR has indicated a declining trend since 2014 and reached 1.26 in 2019. The TFR is projected to remain relatively constant at around 1.3 over the next 25 years. The 2020 TFR was intentionally excluded in Figure 3 due to uncertainties associated with the COVID-19 pandemic. The expected TFR pattern may be temporarily disrupted because of the pandemic. However, it is unlikely to accurately reflect this impact at the time of the report due to the lack of age-specific fertility data for 2020 and 2021.

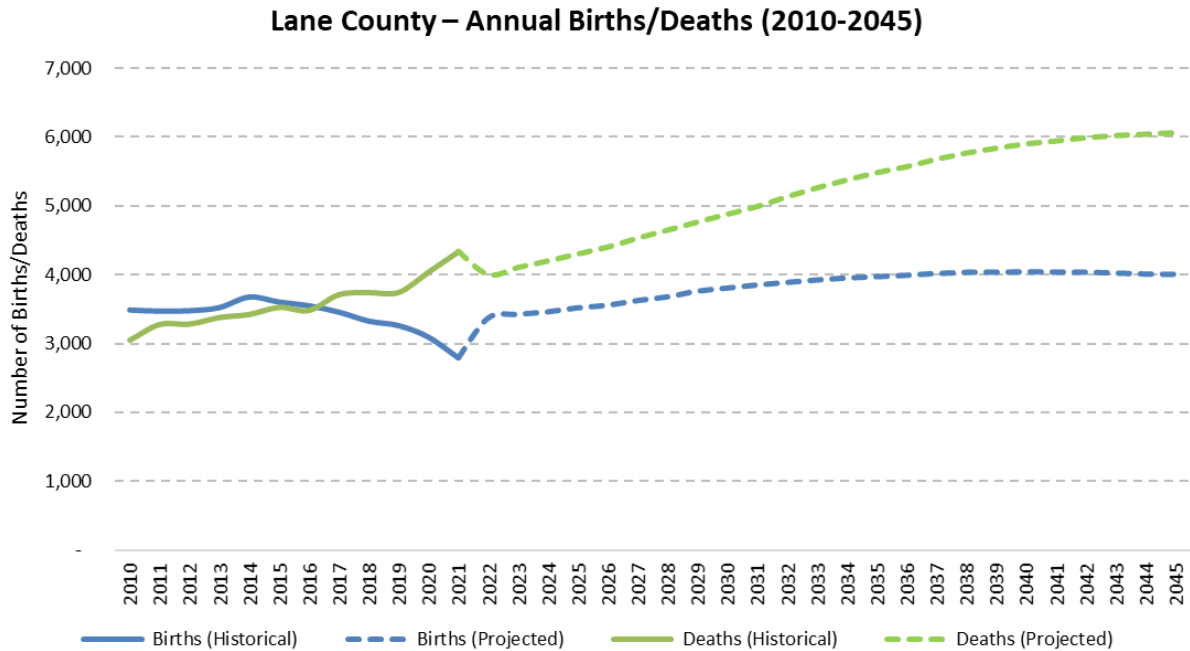
Figure 4 includes historical birth and deaths data, as well as estimations for 2020 and 2021. The 2020 and 2021 estimations were based on the preliminary 2020 records and the purpose of these estimations was to provide a better illustration that accounts for the potential impacts of the COVID-19 pandemic. In general, the number of births continues to grow and is projected to reach over 4,000 in 2045. In contrast, the number of deaths is projected to grow significantly in the next 25 years, reaching over 6,000 per year by 2045. Higher deaths numbers could be attributed to the increase in older population. In comparison, births are not projected to grow at a similar pace as fertility rate does not show any significant increase over the forecast period.

It is important to note that the number of births dropped between 2019 and 2021. Although birth numbers have shown a declining trend since 2014, the trend was estimated to be particularly steep in 2020 and 2021. In the meantime, the number of deaths was particularly high in 2020 and 2021 compared to previous years. This phenomenon may be attributed to the short-term effects associated with the COVID-19 pandemic.



Sources: Oregon Health Authority, Center for Health Statistics. Calculations and forecast by Population Research Center (PRC).
* A break is shown for 2020 due to uncertainties associated with the COVID-19 pandemic and the lack of finalized 2020 age-specific birth data. Some recent research suggested the fertility rate dropped during the pandemic, but actual data is not yet available.

Figure 3. Historical and projected total fertility rate (TFR), 2010-2045.

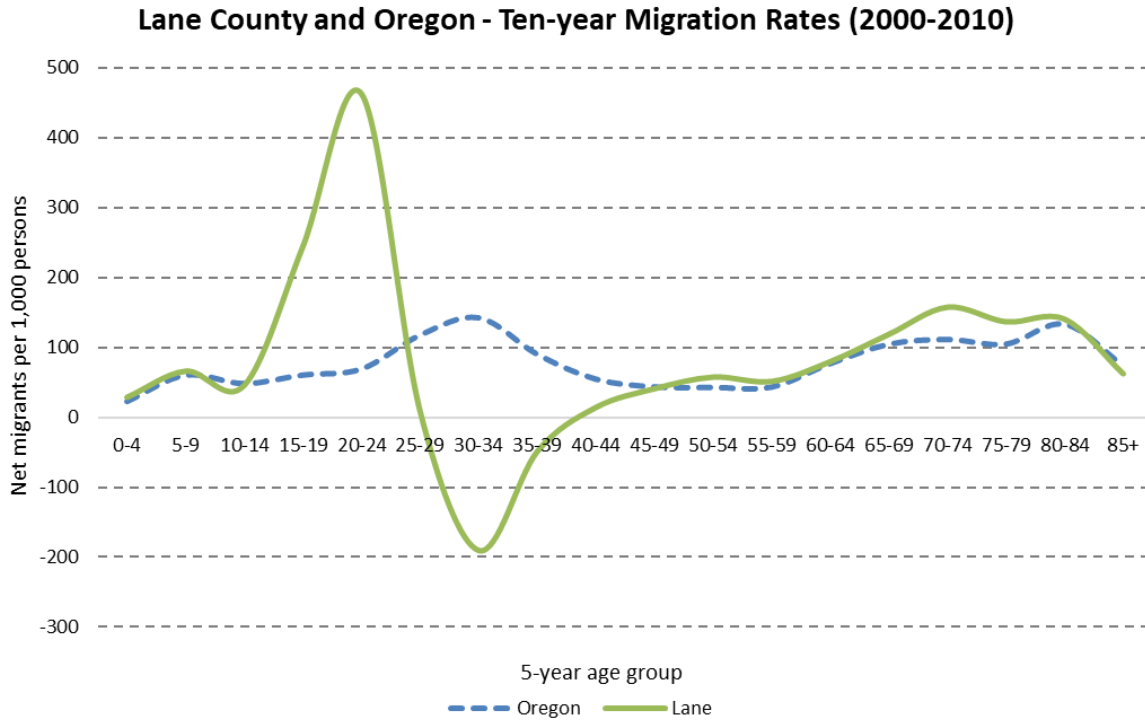


Source: Oregon Health Authority, Center for Health Statistics. Forecast by Population Research Center (PRC)
 * For illustration purposes, the 2020 preliminary data was used because the final data is not available at the time of the report.

Figure 4. Historical and projected annual births/deaths trend, 2010-2045.

3.3 Migration

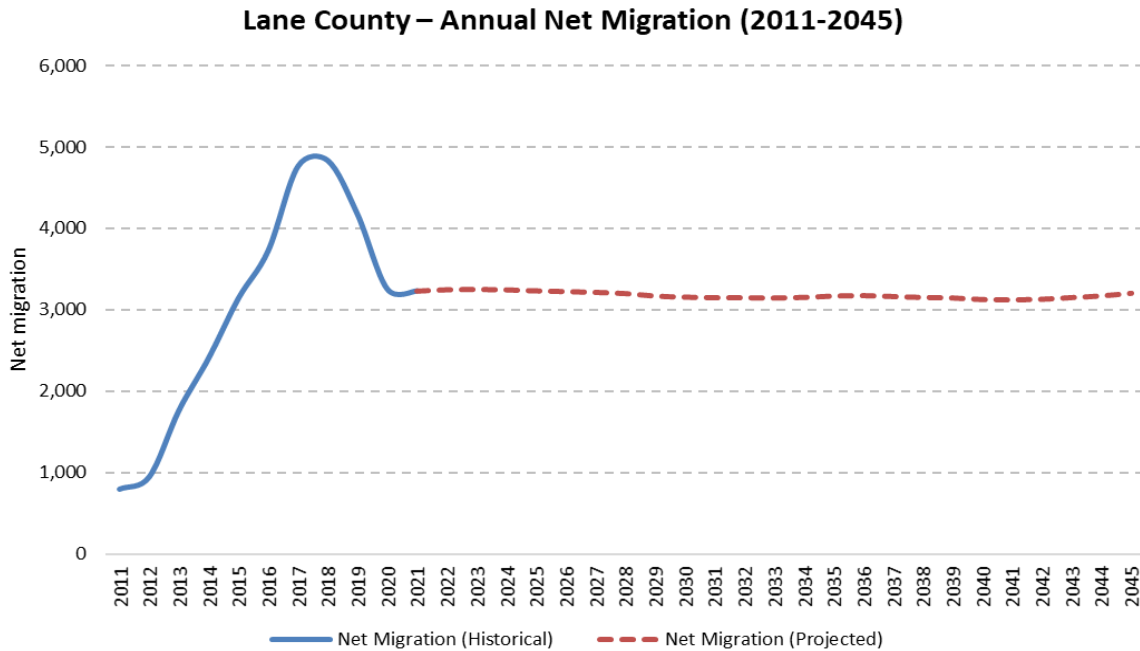
Figure 5 shows the historical migration rate from 2000 to 2019 for each 5-year age group. The 20-24 age group shows the highest net migration rate among all age groups and significantly higher than that of the Oregon State. This higher rate could mainly be associated with the student population at the University of Oregon. Negative net migration rate occurred in the 25-29 age group as the student population graduate and leaves the county or the state. The net migration rate for the oldest age groups was similar to that of the state.



Sources: Center for Demography and Ecology, University of Wisconsin-Madison. Calculated by Population Research Center (PRC).

Figure 5. Net migration rates by age in Lane County and Oregon, 2000-2010.

Based on the forecast, the net migration numbers remain relatively stable from 2020 to 2045. Historically, net migration in Lane County varied from year to year, from fewer than 1,000 in 2011 to nearly 5,000 in 2018 (Figure 6). However, with a little more than 3,000 net migration, 2020 experienced a decline in the number of in-migrants compared to 2019, which had 4,168 net migration. It is possible that the pandemic has posted an impact on the population flow. Given that Lane County houses the University of Oregon, the temporary campus closure has led to a decline in net migration among the student population.



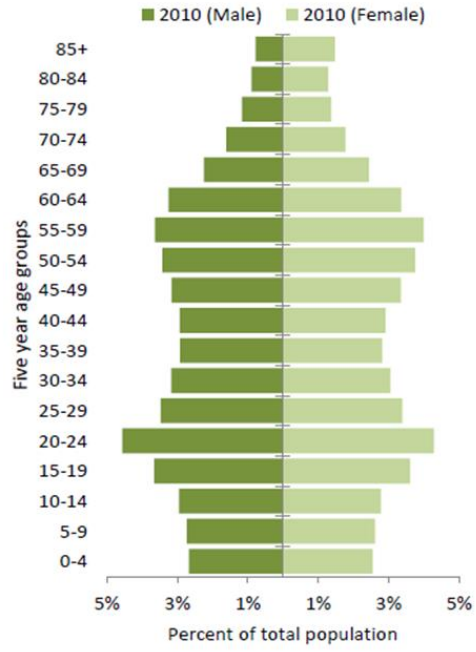
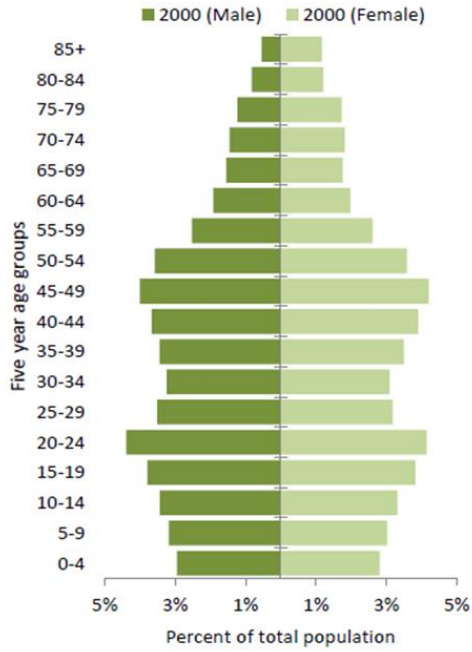
Sources: PRC Estimates. Calculated by Population Research Center (PRC).

Figure 6. Historical and projected total county net migration, 2011-2045.

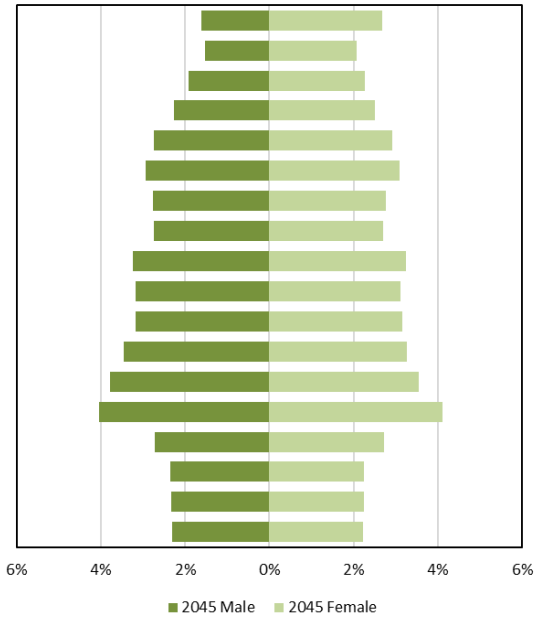
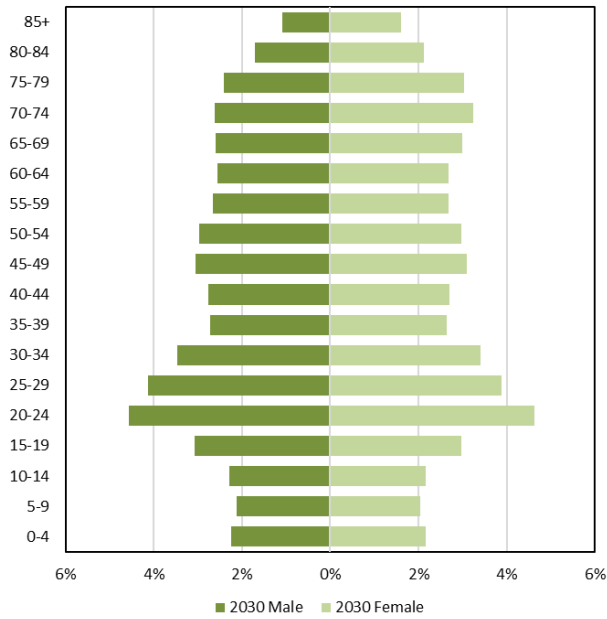
3.4 Age Structure

Due to a relatively large college student body, the population in the 20-24 age group has accounted for the largest share based on the 2000 and 2010 census (Figure 7). Compared to the 2000 census, the population share in the 30-49 age groups slightly declined in 2010 while the share of the population over 55 increased, indicating a population aging forward. There is an observable increase in the population share in the oldest age group in 2010. In Figure 7, population shares of the older age groups are projected to continue increasing across the years, for instance, the share of the 85+ age group increased from 2% in 2020 to 5% in 2045. Regardless of changes in other age groups, the 20-24 age group remains as the largest.

Lane County—Age Structure of the Population (2000 and 2010)



Sources: U.S. Census Bureau, 2000 and 2010 Censuses



Source: Forecast by Population Research Center (PRC).

Figure 7. Population structure by age and sex, 2000, 2010, 2030, and 2045.

3.5 Race/Ethnicity

Table 1 shows the race/ethnicity characteristics in Lane County from the 2000 and 2010 census, as well as the 2019 American Community Survey (ACS) estimates. It is important to note that the 2019 ACS is an estimation, and the sampling methodology is different from the 2000 and 2010 census. Race factor was not included as a part of the forecast but is provided in this report for reference. Population identified as White alone accounted for 88.6% and 84.7% of the county’s population in 2000 and 2010, respectively. With 75.9%, the Hispanic and Latino population has experienced the largest relative change from 2000 to 2010. The Hispanic and Latino population increased from 14,874 in 2000 to 26,167 in 2010, reaching 7.4% of the total population in Lane County. This population accounted for the second largest in the county. Populations identified as “two or more races” and “Asian alone” are the third and fourth largest in the county.

Table 1. County population by race/ethnicity.

	2000		2010		2019 estimates		Absolute change (2000-2019)	Relative Change (2000-2019)
Total population	322,959	100.0%	351,715	100.0%	373,340	100.0%		
Hispanic or Latino (of any race)	14,874	4.6%	26,167	7.4%	33,109	8.9%	18,235	122.6%
Not Hispanic or Latino	308,085	95.4%	325,548	92.6%	340,231	91.1%	32,146	10.4%
White alone	286,075	88.6%	297,808	84.7%	305,453	81.8%	19,378	6.8%
Black or African American alone	2,391	0.7%	3,102	0.9%	3,754	1.0%	1,363	57.0%
American Indian and Alaska Native alone	3,268	1.0%	3,418	1.0%	3,311	0.9%	43	1.3%
Asian alone	6,390	2.0%	8,169	2.3%	9,936	2.7%	3,546	55.5%
Native Hawaiian and Other Pacific Islander alone	562	0.2%	732	0.2%	879	0.2%	317	56.4%
Some other race alone	534	0.2%	514	0.1%	771	0.2%	237	44.4%
Two or more races	8,865	2.7%	11,805	3.4%	16,127	4.3%	7,262	81.9%

Source: U.S. Census Bureau, 2000 and 2010 census, and 2019 ACS. PRC Estimates. Calculated by PRC.

3.6 Component of Change

The component of population changes up to 2045 is shown in Figure 8. The darker blue shade indicates the natural increase/decrease, while the lighter blue shade indicates the net migration. Positive net migration implies that in-migration is higher than out-migration, and vice versa. At the county level, net migration remains positive, while natural decrease is expected to occur in 2027 and will continue afterwards. This implies that county-wide deaths are expected to outnumber births. However, since net migration remains positive and the absolute number of in-migration is more than that of natural decrease, the total population is projected to continue to grow. It is important to note that natural decrease is particularly high in 2021. This is because Figure 8 reflects the potential impacts of the COVID-19 pandemic, in which more deaths and fewer births are expected than usual.

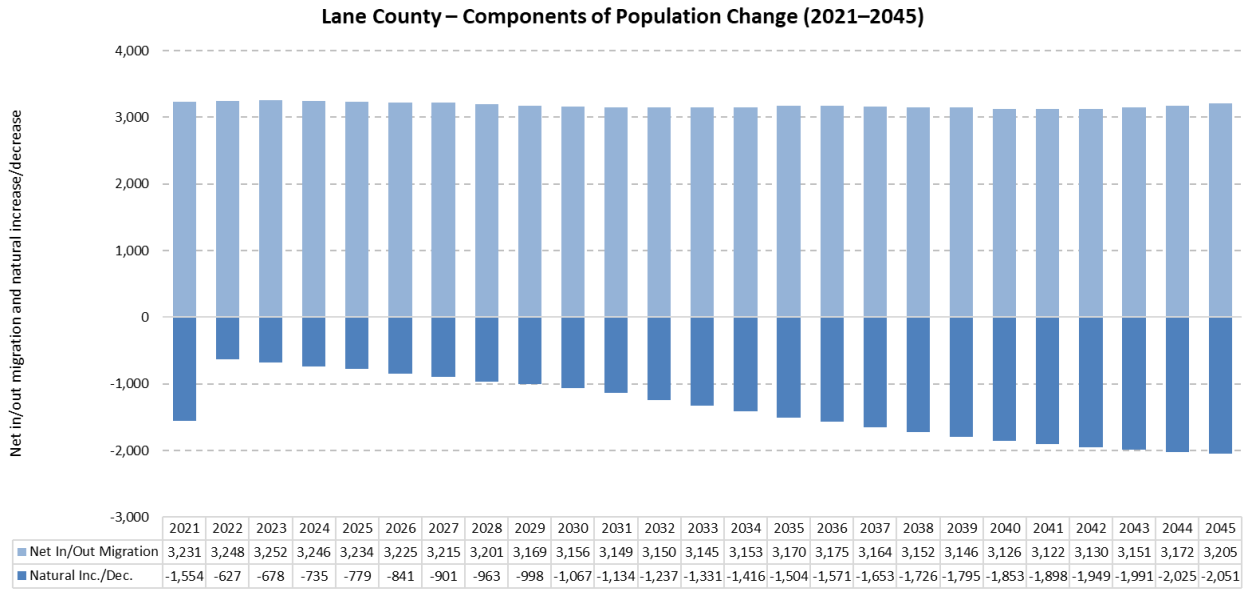


Figure 8. Components of population change, 2021-2045.

3.7 Sub-Area Population

Sub-area populations within and outside the urban growth boundaries (UGBs) are forecasted using the housing unit method. In general, populations within all the UGBs in Lane County will continue to grow through 2070. From 2020 to 2045, Lane County has AAGR of 0.6%. The Coburg, Creswell, Junction City, Lowell, Veneta, and Westfir UGBs are projected to have an AAGR of at least 1.0% in 2020-2045. The most populated UGB in Lane County, Eugene, will have a population of 236,650 by 2045, reflecting a 0.8% AAGR. Population outside of the UGBs is projected to decrease after 2045 (Table 2).

Table 2. Historical and forecasted population and AAGR in Lane County and its sub-areas.

	Historical			Estimates		Forecast			
	2000	2010	AAGR (2000-2010)	2020	AAGR (2010-2020)	2045	2070	AAGR (2020-2045)	AAGR (2045-2070)
Lane County	322,959	351,715	0.9%	381,365	0.8%	443,747	490,958	0.6%	0.4%
Outside UGBs	64,942	63,018	-0.3%	70,144	1.1%	70,631	67,834	0.0%	-0.2%
Larger Sub-Areas									
Cottage Grove	9,002	10,249	1.3%	10,660	0.4%	11,523	12,259	0.3%	0.2%
Eugene	157,989	177,263	1.2%	193,768	0.9%	236,650	268,322	0.8%	0.5%
Florence	8,929	10,327	1.5%	11,182	0.8%	14,040	17,840	0.9%	1.0%
Springfield	62,686	67,663	0.8%	70,337	0.4%	76,604	79,311	0.3%	0.1%
Smaller Sub-Areas									
Coburg	992	1,030	0.4%	1,375	2.9%	2,075	2,805	1.6%	1.2%
Creswell	3,993	5,470	3.1%	5,913	0.8%	8,783	13,293	1.6%	1.7%
Dunes City	1,267	1,278	0.1%	1,365	0.7%	1,580	1,824	0.6%	0.6%
Junction City	5,873	6,043	0.3%	6,954	1.4%	9,110	11,180	1.1%	0.8%
Lowell	877	1,058	1.9%	1,090	0.3%	1,462	1,829	1.2%	0.9%
Oakridge	3,315	3,272	-0.1%	3,458	0.6%	4,322	4,955	0.9%	0.5%
Veneta	2,801	4,782	5.3%	4,845	0.1%	6,602	9,025	1.2%	1.3%
Westfir	294	259	-1.3%	275	0.6%	365	479	1.1%	1.1%

Sources: U.S. Census Bureau. PRC Estimates. Forecast by Population Research Center (PRC).

3.7.1 Larger UGBs

UGBs that has a population of more than 8,000 in the 2010 census are considered larger UGBs. This includes Cottage Grove, Eugene, Florence, and Springfield. As shown in Table 3, Eugene continues to account for most of the county population shares throughout the forecast period. Its share increases from 51.3% in 2020 to 54.7% in 2070. The population share outside of UGBs decreases over time, accounting for 13.8% in 2070, compared to 18.4% in 2020. The population shares in the Cottage Grove and Springfield UGBs are projected to decrease over the 50-year forecast timeframe, even though the populations in these areas are projected to continue to increase.

Table 3. Population forecast for larger sub-areas and their shares of county population.

	Population			Share of County Population		
	Estimates	Forecast		Estimates	Forecast	
	2020	2045	2070	2020	2045	2070
Lane County	381,365	443,747	490,958	100.0%	100.0%	100.0%
Outside UGBs	70,144	70,631	67,834	18.4%	15.9%	13.8%
Larger Sub-Areas						
Cottage Grove	10,660	11,523	12,259	2.8%	2.6%	2.5%
Eugene	193,768	236,650	268,322	51.3%	53.3%	54.7%
Florence	11,182	14,040	17,840	2.8%	3.2%	3.6%
Springfield	70,337	76,604	79,311	18.6%	17.3%	16.2%

Sources: PRC Population Estimates, 2020. Forecast by Population Research Center (PRC)
 Note: Larger sub-areas refer to areas with populations over 8,000 by 2010.

3.7.2 Smaller UGBs

Smaller UGBs in Lane County are projected to gain larger shares of the county population. Among them, Creswell and Junction City show the most growth in population share (Table 3). Creswell's share of county population grows from 1.6% in 2020 to 2.0% in 2045, and then again increases to 2.7% in 2070. Junction City's share of population grows from 1.8% in 2020 to 2.3% in 2070. Westfir is the only region that does not indicate foreseeable increase in population share throughout the forecast period. The total population share of smaller UGBs in Lane County increases to 9.2% in 2070, compared to 6.6% in 2020. By 2045, population within the smaller UGBs is projected to account for 7.7% of the total county population.

Table 4. Population forecast for smaller sub-areas and their shares of county population.

	Population			Share of County Population		
	Estimates	Forecast		Estimates	Forecast	
	2020	2045	2070	2020	2045	2070
Lane County	381,365	443,747	490,958	100.0%	100.0%	100.0%
Outside UGBs	70,144	70,631	67,834	18.4%	15.9%	13.8%
Smaller Sub-Areas						
Coburg	1,375	2,075	2,805	0.4%	0.5%	0.6%
Creswell	5,913	8,783	13,293	1.6%	2.0%	2.7%
Dunes City	1,365	1,580	1,824	0.4%	0.4%	0.4%
Junction City	6,954	9,110	11,180	1.8%	2.1%	2.3%
Lowell	1,090	1,462	1,829	0.3%	0.3%	0.4%
Oakridge	3,458	4,322	4,955	0.9%	1.0%	1.0%
Veneta	4,845	6,602	9,025	1.3%	1.5%	1.8%
Westfir	275	365	479	0.1%	0.1%	0.1%

Sources: PRC Population Estimates, 2020. Forecast by Population Research Center (PRC)

Note: Larger sub-areas refer to areas with populations over 8,000 by 2010.

4. Glossary of Key Terms

Cohort-Component Method: A method used to forecast future populations based on changes in births, deaths, and migration over time.

Coordinated population forecast: A population forecast prepared for the County along with population forecasts for its urban growth boundary (UGB) areas and non-UGB area.

Housing unit: A house, apartment, mobile home or trailer, group of rooms, or single room that is occupied or is intended for occupancy.

Housing-Unit Method: A method used to forecast future populations based on changes in housing unit counts, vacancy rates, the average numbers of persons per household (PPH), and group quarter population counts.

Occupancy rate: The proportion of total housing units that are occupied by an individual or group of persons.

Persons per household (PPH): The average household size (i.e. the average number of persons per occupied housing unit).

Replacement Level Fertility: The average number of children each woman needs to bear in order to replace the population (to replace each male and female) under current mortality conditions in the U.S. This is commonly estimated to be 2.1 children per woman.

5. Appendix A: General Survey for Oregon Forecast Program

County	Lane
Timestamp	11/10/2020 12:51
Jurisdiction	Creswell
Name and Title	Madeline Phillips, City Planner
Observations about Population (e.g. birth rates, aging, immigration, racial and ethnic change)	
Observations about Housing (Vacancy rates, seasonal occupancy, demolitions, renovations)	Low vacancy rates, many additions and renovations to add capacity to existing housing stock.
Planned Housing Developments or Group Quarters Facilities (including number of units, occupancy, and estimated year of completion)	Existing Super 8 motel conversion to 47 apartment units was approved, September 2020
Economic Development (e.g. new employers or facilities, including number of jobs and est. year of completion)	New gas station development
Infrastructure Projects (e.g. transportation and utilities)	Completed 3 reconstructed city blocks of A Street in October 2020
Other Factors Promoting Population or Housing Growth	Regional housing pressure, COVID 19 requiring people to seek larger spaces to inhabit in order to work and educate school-age kids.
Other Factors Hindering Population or Housing Growth	Buildable land is dwindling

<p>Other findings, including, if not discussed above: (a) Summary of current or proposed policies affecting growth in your jurisdiction. (b) Findings related to growth or population change from studies conducted in your jurisdiction. (c) The effects of wildfires or other disasters in your jurisdiction on housing, employment/economics, and infrastructure. (d) The effects of the COVID-19 pandemic and policy measures on employment and current and planned developments.</p>	<p>Imminent Flood Risk Map changes are likely to have a significant impact on Buildable land in Creswell, for housing and employment. Housing needs prompted creation of a High-Density Residential zone (March 2020), which has been assigned to one 1 acre parcel so far. Creswell has approved efficiency measures to encourage smaller lots and more density in all zones.</p>
<p>Comments?</p>	

County	Lane
Timestamp	12/1/2020 17:12
Jurisdiction	City of Coburg
Name and Title	Anne Heath, City Administrator
Observations about Population (e.g. birth rates, aging, immigration, racial and ethnic change)	Demographics are changing to younger families with children
Observations about Housing (Vacancy rates, seasonal occupancy, demolitions, renovations)	Housing is extremely limited. Houses remain on the market for a very short time. Rental units are extremely limited and hard to come by in Coburg.
Planned Housing Developments or Group Quarters Facilities (including number of units, occupancy, and estimated year of completion)	26-35 new standard residential homes in development in 21. Estimated occupancy of 2.5. Additional homes of equal amount in 22-23
Economic Development (e.g. new employers or facilities, including number of jobs and est. year of completion)	Annexation application is being processed for 106 acres of low industrial land on eastside of I-5. Likely to be approved in March, 2021
Infrastructure Projects (e.g. transportation and utilities)	City is undertaking a water expansion project that provides water to the eastside of the freeway. In addition, the City is developing a 3rd well for great water capacity.
Other Factors Promoting Population or Housing Growth	Coburg is attractive to young families and is a quick sell for new housing. There is room for multi-use in several areas of the community which could encourage upper apartment/townhouses.
Other Factors Hindering Population or Housing Growth	Transportation is a issue for increased housing. The current UGB has transportation issues that the City is seeking to work out with the County.

<p>Other findings, including, if not discussed above: (a) Summary of current or proposed policies affecting growth in your jurisdiction. (b) Findings related to growth or population change from studies conducted in your jurisdiction. (c) The effects of wildfires or other disasters in your jurisdiction on housing, employment/economics, and infrastructure. (d) The effects of the COVID-19 pandemic and policy measures on employment and current and planned developments.</p>	<p>The City recently conducted a build-out scenario survey in which we received a high percentage of participation from the community. The community was extremely clear about keeping a small historic town feel and limiting growth that would overburden our transportation infrastructure. There was considerable interest in encouraging mixed use projects and limiting big box, and or chain type businesses. The City will appoint a citizen committee to review development code in order to address some of the largest concerns raised during the survey and community meeting that was held as part of the workplan for the project.</p> <p>City infrastructure including water and sewer is sufficient (once water project is complete) to address growth in both residential and commercial.</p> <p>The city has seen very little change with Covid 19 outside of the restaurants in the downtown corridor. However the long range effects are still to be determined.</p>
<p>Comments?</p>	<p>I just found this while review Jeff Kernens email today. Jeff is no longer at the City and this email was missed. I hope you will still accept our answers.</p>

County	Lane
Timestamp	11/18/2020 15:18
Jurisdiction	City of Cottage Grove
Name and Title	Amanda Ferguson, City Planner
Observations about Population (e.g. birth rates, aging, immigration, racial and ethnic change)	Small but noticeable increase in immigrant (Guatemalan) population. The South Lane School district has hired three new people to assist with Spanish language and Mam language outreach program to meet needs of this community.
Observations about Housing (Vacancy rates, seasonal occupancy, demolitions, renovations)	<p>cancy rates for both rentals and home purchases in 2018-2019 was around 1%. Rental rates have increase 30% over last 3 years. Rental vacancy rates in 2020 remain around 1%.</p> <p>First new multi-family (32 detached cottages) built in Cottage Grove in 2018 after 15 years. In 2019-2020, 15 new apartments were constructed in the downtown historic district. We also saw a 4-plex, 3-plex, and several ADUs. The adoption of a Multi-Unit Property Tax Exemption (MUPTEx) in January 2020 has led to construction of new several of these multi-family developments and to land use approval for 28 townhomes.</p>
Planned Housing Developments or Group Quarters Facilities (including number of units, occupancy, and estimated year of completion)	<p>2019-20: 6 new affordable, single family homes on a single property (DevNW land trust model);13 tiny homes (Cottage Village); 4-unit Cottage Cluster for veterans by Homes for Good; Magnolia Gardens Assisted Living expanded capacity by 37 beds.</p> <p>Rezoned 6.8 acre parcel from Single Family Residential to Medium Density Residential to allow for the development of multi-family residential near elementary school -- expect application for 80 unit apartment complex for 1/3 of this property in early 2021, for development in 2021/2022.</p>

<p>Economic Development (e.g. new employers or facilities, including number of jobs and est. year of completion)</p>	<p>Large new industrial employers: PakTech (10+ employees, rehabilitated building in industrial park and purchased adjacent land for expansion in 2021); Weyerhaeuser Cottage Grove (remodeled plant in 2018-2019, added additional staff). Small commercial employers (new): Covered Bridge Brewing Group, Oba Ramen, and Bartolotti's Pizza & Pasta all opened in 2020, with an estimated 10 new job openings. Also opened new office co-op space with capacity for 30 employees, currently at 50% occupancy.</p>
<p>Infrastructure Projects (e.g. transportation and utilities)</p>	<p>Infrastructure projects in 2018-2020 included the rebuilding of R Street, Safe Routes to School infrastructure project around Lincoln Middle School (sidewalk & crosswalk improvements, stormwater & waste water improvements), waste water and water treatment plant upgrades, construction of effluent storage pond at wastewater treatment plant (to allow for 100% storage of effluent for irrigation vs. discharge in river).</p>
<p>Other Factors Promoting Population or Housing Growth</p>	<p>Land use permit submitted to Lane County for second high water reservoir site off of N. 22nd Avenue (will allow for development above 740' in elevation without secondary pumping). Housing production strategies, such as MUPTE, changes to multi-family SDC calculations, non-profit SDC waiver program, and zone changes to allow higher densities/smaller lots & duplexes -- all were adopted in 2020).</p>
<p>Other Factors Hindering Population or Housing Growth</p>	<p>Limited housing inventory, limited availability of partitioned lots, and Covid-19</p>
<p>Other findings, including, if not discussed above: (a) Summary of current or proposed policies affecting growth in your jurisdiction. (b) Findings related to growth or population change from studies conducted in your jurisdiction. (c) The effects of wildfires or other disasters in your jurisdiction on housing, employment/economics, and infrastructure. (d) The effects of the COVID-19 pandemic and policy measures on employment and current and planned developments.</p>	<p>a) Summary of current or proposed policies affecting growth in your jurisdiction -- Housing Needs Analysis adopted in 2019, recommended increased focus on multi-family development and increased densities in residential areas. Housing Implementation Study 2019 led to adoption of MUPTE in 2020, code changes to increase minimum densities in residential areas and allow duplexes wherever single family homes are built (per HB 2001), and rezoning of 9+ acres to medium density residential (6.89 from single family residential and 2.29 from Commercial Tourist). b) Findings related to growth or population change -- City needs to accommodate 1379 new dwelling units in 20 years (69 per year) per Housing Needs Analysis. 25% of new housing needs to be multi-family, 10% needs to be single-family attached (compared to historic, where 74% of</p>

	<p>housing was single-family detached).</p> <p>c) The effects of wildfires or other disasters in your jurisdiction on housing, employment, economy and infrastructure -- Some displaced residents from wildfires 20-miles away relocated to community, filling hotel rooms, increasing number of temporary RV occupants.</p> <p>d) The effects of COVID-19 pandemic and policy measures on employment and current and planned developments -- economic impacts from COVID closures include reduced tourism and retail/restaurant/entertainment closures/reductions -- some businesses (theatre) entirely closed, some greatly reduced (25%-75% reductions in income). Did see two new restaurants open during COVID. Housing vacancies remain >1% (for purchase or rental). Increased homelessness/car-camping. Beds for Freezing Nights (housed in local churches) closed due to COVID, forcing emergency sheltering program by city (with pallet shelters).</p>
Comments?	

County	Lane
Timestamp	11/2/2020 11:45
Jurisdiction	Dunes City
Name and Title	Jamie Mills, City Administrator
Observations about Population (e.g. birth rates, aging, immigration, racial and ethnic change)	Majority of our population is over the age of 65
Observations about Housing (Vacancy rates, seasonal occupancy, demolitions, renovations)	Houses are selling immediately upon listing if under \$500,000.
Planned Housing Developments or Group Quarters Facilities (including number of units, occupancy, and estimated year of completion)	Two subdivisions - one with 14 lots and one with 19 lots, but the 19 lot subdivision is going bankrupt.
Economic Development (e.g. new employers or facilities, including number of jobs and est. year of completion)	None. Our Comp Plan does not allow businesses other than resorts and nursing homes.
Infrastructure Projects (e.g. transportation and utilities)	New hiking and biking pathway.
Other Factors Promoting Population or Housing Growth	We try not to, but short-term vacation rentals have discovered us.
Other Factors Hindering Population or Housing Growth	We have no city water or sewer so it is all wells, lake water, and septics.
Other findings, including, if not discussed above: (a) Summary of current or proposed policies affecting growth in your jurisdiction. (b) Findings related to growth or population change from studies conducted in your jurisdiction. (c) The effects of wildfires or other disasters in your jurisdiction on housing, employment/economics, and infrastructure. (d) The effects of the COVID-19 pandemic and policy measures on employment and current and planned developments.	The City policies currently deter growth. Our resorts, motels, RV parks, and the one restaurant we have were all adversely affected by COVID-19 policy measures. Mail is not being delivered timely or reliably. Continuity in Government was adversely affected by the virus as well, as we do not have the resources to have people work from home, so we furloughed all but one person from March through July. One person cannot keep up with all the information and survey mandates, as well as taxes, PERS, etc., and run the City as well.
Comments?	At this time, our City does not want growth.

County	Lane																						
Timestamp	11/30/2020																						
Jurisdiction	City of Eugene																						
Name and Title	Heather O'Donnell, Senior Planner																						
Observations about Population (e.g. birth rates, aging, immigration, racial and ethnic change)	<p>We do not have additional information about household demographics other than the Census and ACS and the information we provided at the last population forecast survey.</p> <p>According to University of Oregon staff, the UO currently anticipates moderate growth (2.0% to 2.5% per year) in undergraduate student enrollment until 2026, and stabilized enrollment levels after that (Fall term fourth-week enrollment in academic year 2020-2021 was 18,054 for undergraduate students and 3,746 for graduate students). Graduate student enrollment growth is expected to increase very slowly.</p>																						
Observations about Housing (Vacancy rates, seasonal occupancy, demolitions, renovations)	<p>Vacancy rates:</p> <ul style="list-style-type: none"> The city uses housing vacancy rates from the US Census and ACS 1 year or 5 year for long-term planning: <p>Average Vacancy Rate - Eugene</p> <table border="1"> <caption>Average Vacancy Rate - Eugene</caption> <thead> <tr> <th>Year</th> <th>Percentage of Housing Struck</th> </tr> </thead> <tbody> <tr><td>2000</td><td>5.4%</td></tr> <tr><td>2010</td><td>5.0%</td></tr> <tr><td>2011</td><td>6.0%</td></tr> <tr><td>2012</td><td>5.1%</td></tr> <tr><td>2013</td><td>5.9%</td></tr> <tr><td>2014</td><td>6.9%</td></tr> <tr><td>2015</td><td>6.3%</td></tr> <tr><td>2016</td><td>7.0%</td></tr> <tr><td>2017</td><td>6.0%</td></tr> <tr><td>2018</td><td>4.0%</td></tr> </tbody> </table> <p>Source: U.S. Census American Community Survey 1 Year Estimates, Table B25002; U.S. Census 2000, SF1 Table H3; U.S. Census 2010, SF1 Table H3</p> <ul style="list-style-type: none"> However, in 2019 the city polled 66 apartments and found an average of 97% occupancy at that time. <p>Short Term Rentals: Currently, we do not have accurate estimates of short-term rental items. In 2019, as part of a short-term rental discussion with City Council, we guesstimated there were about 850 short term rentals</p>	Year	Percentage of Housing Struck	2000	5.4%	2010	5.0%	2011	6.0%	2012	5.1%	2013	5.9%	2014	6.9%	2015	6.3%	2016	7.0%	2017	6.0%	2018	4.0%
Year	Percentage of Housing Struck																						
2000	5.4%																						
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2014	6.9%																						
2015	6.3%																						
2016	7.0%																						
2017	6.0%																						
2018	4.0%																						

in Eugene based on cursory reviews of the major short-term rental websites. There are likely fewer now.

Number of new dwellings:

The draft graph below shows Eugene had an upswing in residential dwellings after the 2008 recession. The Housing Development Survey includes recent larger multi-family development projects, issued in 2019-10/31/2020.

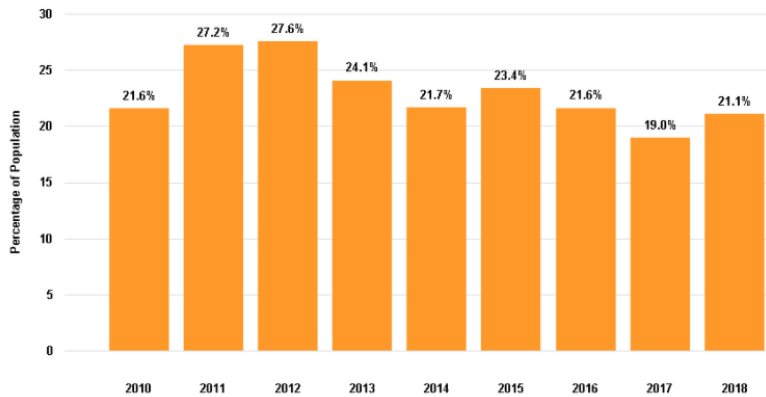
2001-10/31/2020 Issued Dwellings - Combined Totals																				10/31/
	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Total	827	901	693	982	1426	974	643	377	412	396	627	914	1154	1213	688	694	771	895	1048	902

Other observations:

- **Affordability-** Since 2018, Eugene has continued to be identified as a rent-burden city per HB 4006 and housing costs continue to rise. From the US Census and ACS 1 year estimates:

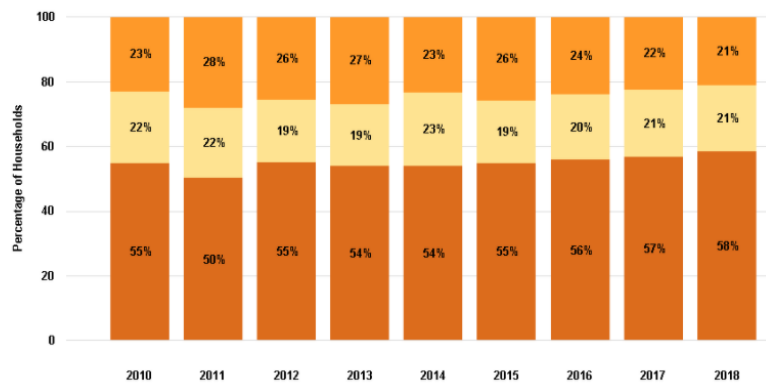
Population in Poverty - Eugene

Poverty statistics are for year prior to indicated census year.

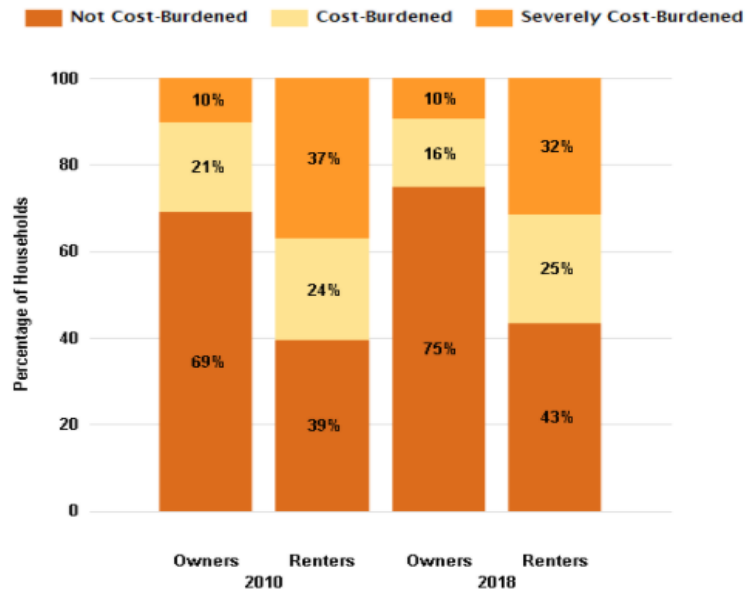


Cost-Burdened Households - Eugene

Legend: Not Cost-Burdened (Dark Orange), Cost-Burdened (Light Orange), Severely Cost-Burdened (Medium Orange)



Cost-Burdened Renters and Owners - Eugene



- HB 2001 will go into effect within the next couple of years. State rules allow us to assume an increase of up to 3% of housing capacity until we have supplemental data.
- Additionally, the city is currently considering updates to the City’s procedures and approval criteria to ensure the city’s clear and objective approval path does not include standards, conditions, and procedures that discourage housing through unreasonable cost or delay as required by State Law.

Employment and Economy-

- From the Eugene and Springfield area as provided in the [Eugene-Springfield Consolidated Plan](#): Economic conditions in Eugene and Springfield have recovered significantly in the past decade, and the region has emerged as a more diversified economy than it was during the Great Recession. The number of jobs has grown steadily during the decade, and unemployment rates have remained relatively low during recent years (below 6%). Wages have risen as well, although the loss of manufacturing jobs still has tempered wage growth in the region. In 2018, unemployment was 4.50%. Employment growth combined with retirements and declining unemployment rates is creating a strengthening economy. As the economy continues to improve, the labor market tightens, availability of skilled workers may create a

	<p>challenge for employers. Unemployment in the region has been decreasing but opportunities are limited for young unskilled workers. The new workforce of youth 16-24 years old accounts for 38% of the workforce. Getting younger workers to work in skilled career opportunities will allow the younger workforce to establish the experience and income that first jobs provide, a key workforce challenge facing both cities. The workforce problems facing younger workers today may follow them well into the future through lower lifetime earnings. While there have been recent and significant job losses as a result of COVID-19, it is unclear how sustained these job losses will be as social distancing measures diminish. It is apparent however that many people with limited incomes are experiencing financial instability as a result of recent events.</p>
<p>Planned Housing Developments or Group Quarters Facilities (including number of units, occupancy, and estimated year of completion)</p>	<p>Vacant Residential land: Eugene’s land base includes approximately 2,157 lots that are vacant, platted, and zoned primarily for residential (there are additional tax lots that do not have a plat associated with them). Of these, 166 were platted more recently (in the last 10 years). See Housing Development Survey for new lots in the pipeline to be platted. There are also larger un-platted taxlots identified through Eugene’s UGB analysis as part of its adopted buildable land inventory. It is noted that Eugene heard through the UGB analysis adopted in 2017 that a significant amount of its buildable land is either not for sale for development or challenging/costly to develop for this area.</p> <p>The University of Oregon: The University of Oregon continues to have a goal of providing on-campus housing (dorms) for at least 25% of undergraduate students and anticipates continuing this goal.</p>
<p>Economic Development (e.g. new employers or facilities, including number of jobs and est. year of completion)</p>	<p>Knight Campus for Accelerating Scientific Impact project, University of Oregon area:</p> <ul style="list-style-type: none"> • 155,000 square foot building comprised of research laboratories, faculty office space and classrooms. Over the next decade, it is estimated that the new principal Knight Campus researchers and their teams will add 750 new jobs and represent an estimated \$80 million in annual statewide economic gains

<https://www.hoffmancorp.com/project/knight-campus-for-accelerating-scientific-impact/>).

- Currently under construction, anticipated completion is 2020 (<https://accelerate.uoregon.edu/building-timeline>).

Previously Occupied Hynix building, west Eugene:

- Stratacache, a company that makes technology for digital signs used as highway billboards, fast-food menu boards, airport ticket kiosks and retail displays, bought the Hynix factory building in west Eugene that has been vacant for several years. They plan to have a production facility up and running by 2023. They will employ 300+ people, manufacturing digital signs.

Land Use Application data:

The following charts show Land Use Application activity for the last five years, 2010 through most of Nov 2020. Since the 2009 recession Eugene has been experiencing an increase in land division applications. Annexations and land divisions in particular are bellwethers for future housing development.

Legend:

Z= zone change

A = annexation

ST = subdivision, tentative (division for a minimum of 4 lots)

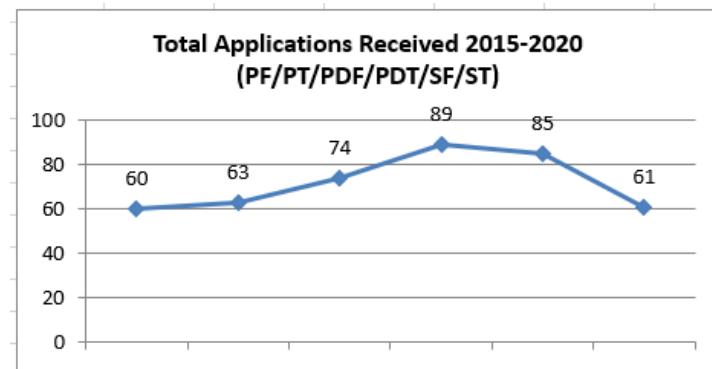
SF = subdivision, final

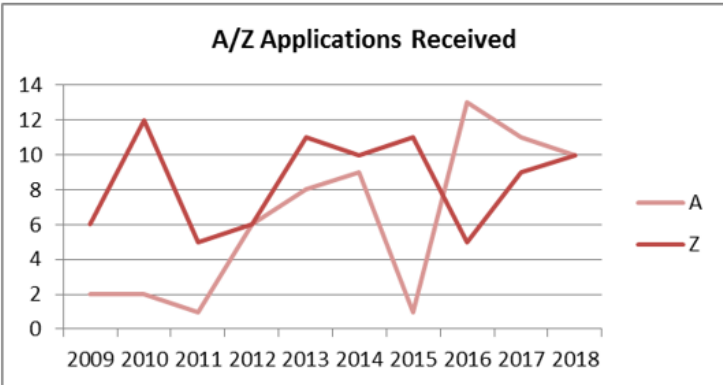
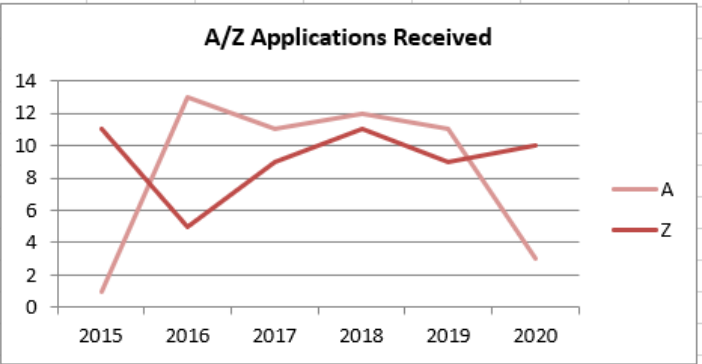
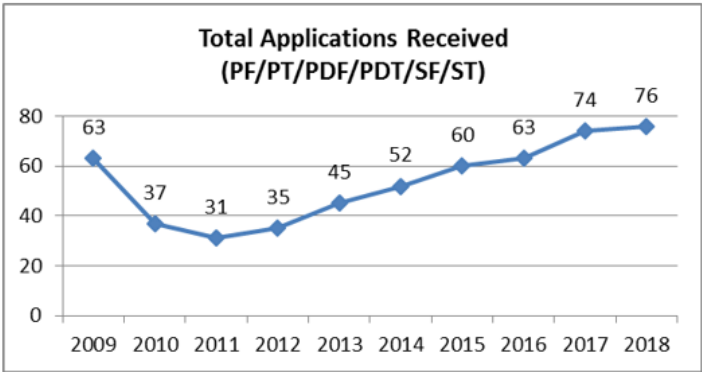
PT = partition, tentative (division for maximum of 3 lots)

PF = partition, final

PDT = planned unit development, tentative

PDF = planned unit development, final





Infrastructure Projects (e.g. transportation and utilities)

Transportation:

- There are no major capital projects on the horizon in the next 10 years for which we are confident of receiving funding. The attached spreadsheet lists capital projects that have received funding or for which we have submitted grant requests
- We have a 20-year TSP adopted in 2017 that shows how the City will develop transportation projects to accommodate the growth expected by 2035. To the extent that there are new planned arterial and collector roadways that are needed to serve new development, these will be constructed by developers. For the most part, the projects

constructed over the next 10 years are more likely to increase capacity for walking, biking and transit; of course, we need capacity for these modes to serve development just as we do for vehicles. In newer parts of Eugene, it's often the sidewalk network that is most lacking and not connected to the new development that has its own internal sidewalk network. We partner with ODOT on projects that are likely to increase the capacity for vehicles and the Beltline (River Road to Delta Highway) project is currently going through a NEPA study but there has been no funding identified for construction beyond the safety design changes that are currently under construction at the Delta/Beltline interchange.

Wastewater:

- Minor wastewater extensions have been made to the city limit as development occurred.
- 20-year, future: The city adopted the 2020 Wastewater Master Plan which identified wastewater system extension projects, existing pump station upgrades and new pump stations needed to serve developable areas within the Urban Growth Boundary established through Envision Eugene.

Water (Eugene Water and Electric Board):

- Most water service is planned if EWEB is aware of the need or if a developer contacts them. Generally, there is capacity in their big infrastructure to handle growth.
- The projects stated in the 2018 PSU survey are still applicable; EWEB is aware of some specific future developments that will need pump stations:
Likely to be in the next 10 years:
 - Laurel Hill Pump Station (for Laurel Ridge Development) (124 units)
 - Fairmount Pump Station for the Capital PUD Development (34 units)Could be next 10 or 10-20 depending on development:
 - 12,000 If 16" pipeline for the Clear Lake Expansion Area Over the next 20 years (new this year's survey):
 - Six 7.5 million-gallon reservoirs at three sites (College Hill, Hawkins Hill, and E. 40th Ave) over the next 20 years. However, these are not growth driven, they are replacing existing failing storage.

<p>Other Factors Promoting Population or Housing Growth</p>	<p>Eugene continues to place on “Best of..” lists, including;</p> <ul style="list-style-type: none"> • The Portland Business Journal recognized the City of Eugene in 2019 as the fifth healthiest employer in the State of Oregon with between 1,500 to 4,999 employees. • Livability.com Top 100 Best Places to Live in 2018 (Eugene #28) • the magazine <i>Bicycling</i> recently released a list of the top 50 bike cities in America (Eugene #7) • Forbes Best Places for Business and Careers (Eugene Metro area #28) • Eugene was named in the 20 Best Towns of the Future “Energy-Smart Cities” by Sunset Magazine for its use of more than 85% of energy from renewable resources. • The UO ranks 104 in the "Best National Universities" list of top tier institutions in U.S. News Media Group’s 2020 America's Best Colleges rankings of 1,800 schools. • Eugene was designated a Gold Level - Walk Friendly Community by the Pedestrian and Bicycle Information Center. • Eugene’s Willamette River trail has been named one of the top 19 urban bike paths in the country by USA Today. The trail, officially called the Ruth Bascom Riverbank Path System, is ranked No. 10 on the newspaper’s list. <p>Eugene is home to the University of Oregon, a local, regional, national and international draw to our community, as well as other institutions of higher learning including Northwest Christian University, Lane Community College, New Hope Christian College, Gutenberg College, and Pacific University’s Eugene campus.</p> <p>Eugene will be hosting the IAAF World Track and Field Championships in 2022, welcoming thousands of visitors. Construction of a new riverfront park at the downtown riverfront redevelopment site, hotels and other associated infrastructure and services is expected. The University of Oregon’s Hayward Field track facility is currently being completely rebuilt and expanded for this event.</p> <p>The Oregon Employment Department Employment Forecast projects Lane County employment to grow by 1.07%) during 2019-2029.</p> <p>In 2017 the City adopted our 20-year (2012-2032) urban growth boundary for jobs, housing, schools, parks and other public facilities and an associated 20-year transportation system plan. There have been no changes to the UGB since then.</p>
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<p>Other Factors Hindering Population or Housing Growth</p>	<p>Some of the areas with the most development capacity for housing or jobs are not served, are expensive to serve, or are dependent on developer construction. As mentioned above, Eugene has heard through the recent UGB analysis process that a significant amount of its buildable land is either not for sale for development or challenging/costly to develop for this area.</p>
<p>Other findings, including, if not discussed above: (a) Summary of current or proposed policies affecting growth in your jurisdiction. (b) Findings related to growth or population change from studies conducted in your jurisdiction. (c) The effects of wildfires or other disasters in your jurisdiction on housing, employment/economics, and infrastructure. (d) The effects of the COVID-19 pandemic and policy measures on employment and current and planned developments.</p>	<p>a) The City is developing an adoption package for a 27-year urban reserve beyond our 2032 UGB. This would meet the City’s projected growth needs to 2059, based on current forecasts and assumptions. The analysis assumes a 0.69% population growth rate from the 2019 PSU forecast and a 1.07% employment growth rate from the Oregon Employment Department 2019 10-year forecast.</p> <p>b) As mentioned during the 2018 PSU forecasting survey, in 2017 the City adopted its 2012-2032 UGB. The analysis assumed a 0.9% population growth rate (PSU forecast) and a 1.43% employment growth rate (OED 2012 10-year forecast). Key elements include:</p> <ul style="list-style-type: none"> • UGB expanded for Bethel School District elementary school (54 ac (25 buildable)), employment/industrial land (643 ac (450 buildable) /3,200 jobs), and community park (222 ac) in the Clear Lake Road Area. UGB expanded for a community park (35 ac) in the Santa Clara area. • The UGB accommodates the entire 20-year multi-family and commercial demand inside the existing UGB through additional actions by the City. <ul style="list-style-type: none"> ○ High Density multi-family (1,300 apartments) and commercial retail is accommodated in the downtown through use of tools (zoning code amendments, financial incentives, etc.) that encourage redevelopment. ○ Medium Density residential is accommodated by amending the zoning code to slightly increase the minimum density required in medium density residential zones. ○ Land use code was changed (adopted in 2014) so that industrial land can accommodate more of the commercial office demand (estimated gain: 4,250 jobs inside UGB). • The 20-year Low Density Residential housing need was also accommodated inside the UGB through adopted (2014) plan designations changes from multi-family to low density residential in areas where low density may be more feasible (estimated gain: 631 low density residential units inside the UGB). SDC reductions for accessory dwellings are currently under consideration by City Council and if adopted, are

expected to incentivize 84 additional dwellings over 20 years.

- Analysis assumes that all jobs lost during the recession (2006-2010) will be accommodated in existing buildings inside the UGB.
- Analysis assumes the University of Oregon needs 45 additional acres for non-housing university uses beyond the existing campus area.
- Status of development in the Clear Lake UGB expansion area remains the same:
 - The entire Clear Lake expansion area contains 924 acres for jobs, schools and parks amidst active streams, canals, and wetlands, which are an invaluable asset to our local and regional ecosystems. The City of Eugene’s Stormwater Basin Master Plan provides area-wide guidance to manage stormwater, protect wetland and floodplain resources, and mitigate impacts to natural resources. The City is exploring a large sports field complex at this location as well.
 - The City allocated \$70,000 for readying the Clear Lake site for development. Accordingly, the City is currently performing analyses for stormwater management planning and design; recommendations for wetland protection, mitigation, and/or restoration; identifying infrastructure needs; establishing a wetland mitigation bank; and recommending phasing to accomplish these efforts. It will be a few years before the studies are completed and the City has a timeline for development readiness of this area.

For more information on the adopted UGB please see:

[Eugene Comprehensive Plan](#)

[Eugene 2012-2032 Residential Land Supply Study](#)

[Eugene 2012-2032 Employment Land Supply Study](#)

For a copy of the BLI, please contact Thea Evans at TEvans@eugene-or.gov for more information

c) Wildfires: The destruction of housing stock in the McKenzie River Valley has made Eugene’s tight housing market even tighter, especially at the lower-cost end of the spectrum. While Eugene did not lose any housing (or structures) within its city limits, there are now displaced households in need of housing. Additionally, the fires slowed or stopped outdoor work for about two weeks in Eugene but didn’t directly impact Eugene. We’ve heard concerns about the quality of Eugene’s drinking-water quality given the fire’s proximity

	<p>to our watershed—however EWEB has indicated that its purification system can handle negative impacts.</p> <p>d) COVID: Construction has continued throughout 2020. There were three large housing projects that had begun before the pandemic (5th St Market expansion, Ferry St Manor, and the Art building on Pearl at 17th) and they are all very close to completion, and two new large student-housing developments are moving ahead. We are currently analyzing building permit data to consider if building permits have kept on pace even during COVID. Housing permit numbers and land use application data are identified earlier in this survey.</p>
Comments?	

County	Lane
Timestamp	11/30/2020 11:03
Jurisdiction	City of Florence
Name and Title	Roxanne Johnston, Senior Planner, CFM
Observations about Population (e.g. birth rates, aging, immigration, racial and ethnic change)	<p>According to demographic data found at the following link, https://www.towncharts.com/Oregon/Demographics/Florence-city-OR-Demographics-data.html our community's population has a median age of 60.3. I could not find current birth rates nor immigration. According to this link, https://worldpopulationreview.com/us-cities/florence-or-population our population overall enjoyed a growth rate of 1.51% annually, with a 10.83% growth rate since the 2010 Census. According to the same link, here is the breakdown of the population by race since the last ACS:</p> <ul style="list-style-type: none"> • White: 92.31% • Two or more races: 2.82% • Asian: 1.80% • Other race: 1.66% • Native American: 1.10% • Native Hawaiian or Pacific Islander: 0.23% • Black or African American: 0.08%
Observations about Housing (Vacancy rates, seasonal occupancy, demolitions, renovations)	<p>Vacancy rates are very low, seasonal occupancy (even with the Covid pandemic) was high this summer, very few, if any demolitions, and several renovations. High-priced short-term rentals dominate the market during the tourist season and squeeze out rental opportunities for workforce housing groups. Construction materials are on the rise and since the community is rural, costs may be higher due to the need to transport them. Construction crews from out of the area may find temporary housing hard to find and rental costs prohibited to the developer.</p>
Planned Housing Developments or Group Quarters Facilities (including number of units, occupancy, and estimated year of completion)	<p>This past year has seen two planned housing developments; an HOA with 12 units and another with 16 units. The 12 have been permitted and should be ready for occupancy in early 2021. Some of the 16-unit HOA have been sold and are occupied and the remainder nearly completed and are currently for sale.</p>
Economic Development (e.g. new employers or facilities, including number of jobs and est. year of completion)	<p>The seasonal tourism economy has become less seasonal, especially with COVID-19 and people are choosing not to travel – people still travel to the beach, but are staying close to home.</p> <p>Most of the business license applications submitted this year have been focused on service and construction industries; many operate out of their homes and are self-employed. In the coming year, a carwash and a coffee kiosk duo are targeted for completion and employment for those</p>

	is projected to be 13-15 for the kiosk (5 being full time) and one employee to maintain the carwash.
Infrastructure Projects (e.g. transportation and utilities)	ODOT and the City of Florence have been working on a beautification project along Highway 101 within the City. This includes new ADA accessible sidewalks, planters as traffic dividers, landscaping, pedestrian crosswalks with flashing lights, and bike lane striping. The City has also erected some placemaking monoliths at the entrance of Old Town. These monoliths echo the historic bridge design monoliths. No new water/sewer facilities at this time.
Other Factors Promoting Population or Housing Growth	Recession recovery has impacted growth as has the competition for non-profit receipt of state loans for low-income housing. Generally speaking to housing construction as a whole, infill- 'easy' lots are built out and now more challenging lots (with steeper slopes requiring more engineering, for example) are being developed.
Other Factors Hindering Population or Housing Growth	Affordable/workforce housing not being built fast enough, low number of available rents and these are not cost effective to rent given the high rental markets of this past year. No doubt, Covid-19 impacted job opportunities (and associated childcare facilities and businesses and costs) and have limited travel from bedroom communities that may have enjoy lower housing costs.
Other findings, including, if not discussed above: (a) Summary of current or proposed policies affecting growth in your jurisdiction. (b) Findings related to growth or population change from studies conducted in your jurisdiction. (c) The effects of wildfires or other disasters in your jurisdiction on housing, employment/economics, and infrastructure. (d) The effects of the COVID-19 pandemic and policy measures on employment and current and planned developments.	<p>a. Current policies in place include placement of manufactured homes in all residential zoning districts, accessory dwelling units permitted on any lot with a single-family residence, housing code updates which included increased density, smaller lot sizes, and increased lot coverage.</p> <p>b. More recent findings for population and housing growth include a Housing Needs Analysis & Economic Opportunities study (adopted late 2018). This study maintains that Florence's population was 8,947 and assuming a growth rate of 0.9% over twenty years, that the population would then be 12,554: https://www.ci.florence.or.us/planning/housing-and-economic-opportunities-project-completed-nov-2018 The United States Census Bureau https://www.census.gov/quickfacts/florencecityoregon sites a projected July 2019 population for Florence of 9,151.</p> <p>c. Although our county was affected by the wildfires, our coastal region was not in the affected area. To the best of my knowledge, we have not seen an increase in population from those relocating from those areas.</p>

	<p>d. Pandemic policy have shuttered some businesses. The extent is yet to be discovered; but the gap between when some businesses were required to close (restaurants, for example) and the time to receive state financial aid assistance may have been to great for those businesses to stay afloat. Their employees of those face to face service industries no doubt felt the economic pressures. Also, some business owners who were under the impression that they were 'at risk' for contracting Covid have also felt the negative economic effects of the pandemic.</p>
<p>Comments?</p>	<p>The link to our Florence Realization 2020 Comprehensive Plan is: https://www.ci.florence.or.us/sites/default/files/fileattachments/planning/page/639/florence_realization_2020_comprehensive_plan_complete_-_jul._2018.pdf</p>

County	Lane
Timestamp	11/2/2020 15:13
Jurisdiction	City of Junction City
Name and Title	Planning Technician
Observations about Population (e.g. birth rates, aging, immigration, racial and ethnic change)	
Observations about Housing (Vacancy rates, seasonal occupancy, demolitions, renovations)	139 unit apartment complex nearing completion, buildings completed are rented. Building permit applications under review for 129-unit apartment complex. 8 duplex units recently received building permit approvals.
Planned Housing Developments or Group Quarters Facilities (including number of units, occupancy, and estimated year of completion)	300+ lot PUD received final approval from the JC Planning Commission 10-21-2020
Economic Development (e.g. new employers or facilities, including number of jobs and est. year of completion)	none.
Infrastructure Projects (e.g. transportation and utilities)	W 10th Avenue extended west. Planned extension of W 6th Avenue to the west (spring 2021)
Other Factors Promoting Population or Housing Growth	
Other Factors Hindering Population or Housing Growth	

<p>Other findings, including, if not discussed above: (a) Summary of current or proposed policies affecting growth in your jurisdiction. (b) Findings related to growth or population change from studies conducted in your jurisdiction. (c) The effects of wildfires or other disasters in your jurisdiction on housing, employment/economics, and infrastructure. (d) The effects of the COVID-19 pandemic and policy measures on employment and current and planned developments.</p>	
<p>Comments?</p>	

County	Lane
Timestamp	11/3/2020 13:31
Jurisdiction	City of Lowell
Name and Title	Joyce Donnell - City Clerk
Observations about Population (e.g. birth rates, aging, immigration, racial and ethnic change)	Our population is increasing with the median age decreasing, a strong Caucasian presence.
Observations about Housing (Vacancy rates, seasonal occupancy, demolitions, renovations)	A shortage of housing. Homes are being renovated and sold in matter of days. New ones are being built.
Planned Housing Developments or Group Quarters Facilities (including number of units, occupancy, and estimated year of completion)	We have two subdivisions being worked on currently.
Economic Development (e.g. new employers or facilities, including number of jobs and est. year of completion)	There are plans in the making, but nothing on paper yet.
Infrastructure Projects (e.g. transportation and utilities)	Working on roads, and automated water meters.
Other Factors Promoting Population or Housing Growth	Fantastic School system.
Other Factors Hindering Population or Housing Growth	Limited space.

<p>Other findings, including, if not discussed above: (a) Summary of current or proposed policies affecting growth in your jurisdiction. (b) Findings related to growth or population change from studies conducted in your jurisdiction. (c) The effects of wildfires or other disasters in your jurisdiction on housing, employment/economics, and infrastructure. (d) The effects of the COVID-19 pandemic and policy measures on employment and current and planned developments.</p>	<p>We are at a very exciting forward movement with our City.</p>
<p>Comments?</p>	

County	Lane
Timestamp	11/25/2020 10:03
Jurisdiction	City of Springfield
Name and Title	Comprehensive Planning Manager
Observations about Population (e.g. birth rates, aging, immigration, racial and ethnic change)	Springfield has a younger community on average compared to the county and state, because of the type of jobs we offer, slightly lower housing/utility costs compared to Eugene, and our proximity to the University of Oregon. Thus, we have more younger families that are having children. Our Hispanic community does not seem to be growing, perhaps because of the high costs of low-ownership.
Observations about Housing (Vacancy rates, seasonal occupancy, demolitions, renovations)	No notable seasonal occupancy or student housing. Vacancy rates in multi-family at about 3.3% in 2019 and has dropped to perhaps close to 1% or even lower this year. We have two months of inventory of homes for sale for the past two years. The tight inventory leads to increasing prices and lack of population growth. There is not much happening in terms of renovations, but we are seeing some infill developments adding density in some neighborhoods.
Planned Housing Developments or Group Quarters Facilities (including number of units, occupancy, and estimated year of completion)	Developer pipeline projects (primarily Marcola Meadows 440 single-family and 300 multi-family) for a total of 900 units to be constructed over the next few years (see companion housing survey). Assisted living project on game Farm Road of about 104 rooms. Homes for Good 76 multi-family units under construction with occupancy in 2021. 20 multi-family units has final site plan approval to start construction in 2020 on Main Street. Cherry Springs has about 100 multi-family units but is still in proposal stage. A few other multi-family projects also in proposal stage. Four duplex units are under construction as well as a scattering of accessory dwelling units.
Economic Development (e.g. new employers or facilities, including number of jobs and est. year of completion)	Expected new jobs include 100 at Wayfair and 50 at PacificSource. Two hospitals are each adding 20-30 jobs per year. Potential expansion of Royal Caribbean and other employers in the north Gateway area (estimating 100 new jobs in the next couple years).
Infrastructure Projects (e.g. transportation and utilities)	Increased pressure to address congestion at the Gateway-Beltline intersection. Finishing Phase 3 of Jasper trunk sanitary sewer line by 2023. Will have extended sanitary sewer on S. 28th Street to the Mill Race and paving of that road by 2023. McVay Highway road improvements (currently doing NEPA analysis) to support employment at

	development on Wildish and Weyerhauser properties are forthcoming (sanitary sewer already in place).
Other Factors Promoting Population or Housing Growth	Overall quality of life. Proximity to the University of Oregon and the recent growth of the UO, proximity to Eugene airport for flight commuters, infrastructure supported economy (esp. the gig economy), proximity to outdoor quality of life features, availability of experienced contractors and sub-contractors. People potentially relocating from the McKenzie River valley after the Holiday Farm fire.
Other Factors Hindering Population or Housing Growth	Constrained housing market (limited stock and diversity of housing for both rental and ownership). Eugene offers a higher return on investment so developers not as likely to develop in Springfield. Other smaller housing markets nearby offer more affordable options. Lack of market comparables creates an insecure financial market for multi-family housing projects. Lack of easy-to develop sites and perception of high infrastructure costs.
Other findings, including, if not discussed above: (a) Summary of current or proposed policies affecting growth in your jurisdiction. (b) Findings related to growth or population change from studies conducted in your jurisdiction. (c) The effects of wildfires or other disasters in your jurisdiction on housing, employment/economics, and infrastructure. (d) The effects of the COVID-19 pandemic and policy measures on employment and current and planned developments.	<p>The purpose of the development code update is to support efficient, timely, and clear development review. It will make it easier to develop a mixture of housing types, including middle housing.</p> <p>The City Council is reexamining vertical housing tax exemption for downtown and may also adopt the multi-unit property tax exemption for other parts of Springfield to encourage multi-family housing.</p> <p>Within the urban renewal districts, the Springfield Economic Development Agency pays the system development charges on behalf of qualifying projects. It is also exploring taking a role in market rate (invest and own).</p> <p>The City has waived system development charges for accessory dwelling units to encourage this infill housing type.</p> <p>The City Council is exploring the financing of infrastructure extension (sanitary sewer and stormwater) and including those projects in the Capital Improvement Plan to encourage residential development.</p> <p>City will maintenance of the enterprise zone program that incents new jobs and new equipment investments.</p> <p>City is undertaking an inventory and assessment of the wetland and riparian areas in the recent UGB expansion area of land targeted to employment. This effort along with</p>

	<p>addressing the transportation issues in the north Gateway area are preparing those properties for urbanization and ultimate development.</p> <p>The city has an adopted economic strategy to focus on site readiness and job creation/retention. The economic development manager actively works to carry out this strategy.</p> <p>c) Holiday Farm wildfire impacts have created a water vulnerability for the water supplier for EWEB and increased potential for flooding. Some of the McKenzie River community evacuees have landed in Springfield and may decide to settle here. Our unhoused population is likely to grow as the evacuees are currently getting FEMA support lack resources to find and maintain housing in a tight rental market and may rely more on living in recreational vehicles or doubling up with family/friends.</p> <p>d) The City has taken extraordinary measures to continue services to residents/businesses. Not sure of total impact of COVID until the lease moratorium comes to an end. COVID has slowed progress on the assisted living facility construction and some commercial development. We don't have a large inventory of speculative office buildings, so we may will probably do better than other communities in bearing the economic impacts.</p>
Comments?	

County	Lane
Timestamp	11/23/2020 16:16
Jurisdiction	Veneta
Name and Title	Evan MacKenzie, Community Dev. Dir.
Observations about Population (e.g. birth rates, aging, immigration, racial and ethnic change)	<p>Enrollment at Fern Ridge School District has been increasing steadily, from a low of 1297 in 2014-2015 to 1425 in 2019-2020. While enrollment at Elmira High School (which serves the entire district) has declined slightly, enrollment at Veneta Elementary has gone up.</p> <p>The U.S. Census population estimate for Veneta on July 1, 2019 was 5,056. This number is higher than the PSU Population Research Center 2019 estimate of 4,800.</p> <p>Empirical observations align with official data and indicate the population of Veneta is overwhelmingly white, with few minorities. This is generally consistent with the Eugene-Springfield metro area.</p>
Observations about Housing (Vacancy rates, seasonal occupancy, demolitions, renovations)	<p>There are not a lot of listings here in Veneta, and those that we do see often sell fairly quickly. There are a number of ready to build lots available currently, but building on those requires a buyer who can afford to build while paying a second rent or a mortgage during construction. It is difficult to obtain information specific to the land inside City limits from sites such as Realtor.com, because data results do not align with our boundary.</p> <p>We have few known homes that are only seasonally occupied, and very few listings on sites such as AirBnB. Our town is still relatively young, so we do not have a large stock of very old homes that get major renovations or demolitions.</p>
Planned Housing Developments or Group Quarters Facilities (including number of units, occupancy, and estimated year of completion)	<p>The only project currently “in the works” is phase 1 of Madrone Ridge, which will result in 37 new single family detached homes. Several phases remain, which together include another +/-60 lots. We have several projects underway on Jameson Lane (14 duplex lots) and in the vicinity of 10th and Nottingham (15 lots).</p> <p>See response below for Other Factors Hindering Population or Housing Growth.</p>

<p>Economic Development (e.g. new employers or facilities, including number of jobs and est. year of completion)</p>	<p>We have no Economic Development activities or projects underway that can be expected to result in a significant number of new employees in the City in the next year. We have however had a new Grocery Outlet store open very recently and will see a new Dollar General store open very soon, both of which will provide a small increase in local jobs.</p>
<p>Infrastructure Projects (e.g. transportation and utilities)</p>	<p>We have no major projects planned. On the plus side, we have no known deficiencies regarding our ability to provide services that would limit new development.</p>
<p>Other Factors Promoting Population or Housing Growth</p>	<p>We have a fairly large supply of buildable land.</p>
<p>Other Factors Hindering Population or Housing Growth</p>	<p>Like all jurisdictions across Oregon, we cannot simply “make” someone build housing. We have one project in town where the developer completed as many phases as they could before dedicating a public park, and then simply quit the project and put the property up for sale. This has left perhaps 100-200 lots unplatted. We have another project where the original developer lost the project, and the new owner is proceeding, but after five years we will only see the first of several phases platted before the approval expires. Another large project including senior housing and separate single family homes went to LUBA last year, and although the City’s approval was affirmed, the developer has decided to market the property with the entitlement rather than move forward.</p> <p>It should not go unstated that the cost of land, labor and materials is generally increasing faster than incomes. That means any new housing is not likely to be “affordable” for a first-time home buyer or a renter. The only thing that will help those who need it most is a massive increase in the availability of “used” housing.</p>

<p>Other findings, including, if not discussed above: (a) Summary of current or proposed policies affecting growth in your jurisdiction. (b) Findings related to growth or population change from studies conducted in your jurisdiction. (c) The effects of wildfires or other disasters in your jurisdiction on housing, employment/economics, and infrastructure. (d) The effects of the COVID-19 pandemic and policy measures on employment and current and planned developments.</p>	<p>We have no recent or pending policy changes that should have a significant impact on growth and development. We are working on several code updates to make our Land Development Code easier to use, but there are no significant changes to what can be done. We have done no studies that would indicate any changes to anticipated growth. The wildfires had no direct impact on city growth and development, but we could potentially see some of the people displaced from the fires east of Springfield look for new housing in our area. While the COVID-19 pandemic has impacted Veneta as it has everyone else, we have no direct evidence that would give us insight into longer term impacts.</p>
<p>Comments?</p>	

6. Appendix B: Detail Population Forecast Results

Age	2020	2021	2025	2030	2035	2040	2045
0-4	17,197	17,013	16,889	18,131	19,428	20,064	20,163
5-9	17,904	19,344	17,697	17,109	18,369	19,685	20,331
10-14	18,955	19,708	19,972	18,321	17,710	19,013	20,377
15-19	24,070	23,894	24,571	24,922	23,260	22,640	24,096
20-24	31,759	36,815	36,672	37,881	38,522	36,809	36,201
25-29	26,571	27,959	32,845	33,017	34,153	34,739	32,505
30-34	25,175	22,776	23,092	28,311	28,367	29,376	29,904
35-39	23,072	23,389	21,887	22,073	26,979	27,078	28,049
40-44	21,733	23,952	24,503	22,544	22,741	27,794	27,897
45-49	21,494	20,886	23,847	25,307	23,292	23,497	28,719
50-54	22,255	21,357	21,512	24,505	26,018	23,945	24,156
55-59	24,514	22,431	21,381	21,988	25,068	26,611	24,488
60-64	26,081	24,920	23,224	21,546	22,167	25,282	26,827
65-69	26,813	25,855	24,963	23,041	21,376	21,988	25,082
70-74	21,531	23,225	24,946	24,143	22,268	20,674	21,247
75-79	13,908	14,533	19,571	22,395	21,690	20,013	18,638
80-84	8,914	8,927	11,299	15,723	17,947	17,389	16,038
85+	9,418	8,245	8,869	11,086	15,069	18,250	19,029

Source: PRC Estimates, 2020; Forecast by Population Research Center (PRC).

7. Appendix C: Comparison of Current and Previous Forecast

To provide a better understanding of the changes since the last round of forecast for the Region 4 counties, this section compares the current 2021 total county population forecast to the population forecast published by the Population Research Center in 2017. The 2019 forecast of Lane County was used since Lane County was forecasted as part of the Region 2 counties in 2019.

