# Coordinated Population Forecast

**2018**

**Through**

**2068**

## Jackson County

Urban Growth Boundaries (UGB) & Area Outside UGBs

Population Research Center
PORTLAND STATE UNIVERSITY

Photo Credit:  Lower Table Rock at sunset. Gary Halvorson, Oregon State Archives.

# Coordinated Population Forecast for Jackson County, its Urban Growth Boundaries (UGB), and Area Outside UGBs 2018-2068

**Prepared by**

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# How to Read this Report

This report should be read with reference to the documents listed below—downloadable on the Forecast Program website (http://www.pdx.edu/prc/opfp).

Specifically, the reader should refer to the following documents:

- *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 (2018-2068).

# Table of Contents

Modified Methodology ..... 6
Comparison to Cycle 1 (2015-17) ..... 6
Executive Summary ..... 7
14-Year Population Forecast ..... 9
Historical Trends ..... 10
Population ..... 10
Age Structure of the Population ..... 11
Race and Ethnicity ..... 12
Births ..... 13
Deaths ..... 15
Migration ..... 15
Historical Trends in Components of Population Change ..... 16
Housing and Households ..... 17
Assumptions for Future Population Change ..... 20
Assumptions for the County and Larger Sub-Areas ..... 20
Assumptions for Smaller Sub-Areas ..... 21
Forecast Trends ..... 22
Forecast Trends in Components of Population Change ..... 24
Glossary of Key Terms ..... 27
Appendix A: Surveys and Supporting Information ..... 28
Appendix B: Specific Assumptions ..... 45
Appendix C: Detailed Population Forecast Results ..... 47

## Table of Figures

Figure 1. Jackson County and Sub-Areas—Historical and Forecast Populations, and Average Annual Growth Rates (AAGR) ..... 8
Figure 2. Jackson County and Sub-Areas—14-Year Population Forecast ..... 9
Figure 3. Jackson County—Total Population by Five-year Intervals (1975-2017) ..... 10
Figure 4. Jackson County and Sub-areas—Total Population and Average Annual Growth Rate (AAGR) (2000 and 2010) ..... 11
Figure 5. Jackson County—Age Structure of the Population (2000 and 2010) ..... 12
Figure 6. Jackson County—Hispanic or Latino and Race (2000 and 2010) ..... 13
Figure 7. Jackson County and Oregon—Total Fertility Rates (2000 and 2010) ..... 13
Figure 8. Jackson County—Age Specific Fertility Rate (2000 and 2010) ..... 14
Figure 9. Jackson County—Average Annual Births (2010-2045) ..... 14
Figure 10. Jackson County—Average Annual Deaths (2010-2045) ..... 15
Figure 11. Jackson County and Oregon—Age Specific Migration Rates (2000-2010) ..... 16
Figure 12. Jackson County—Components of Population Change (2001-2016) ..... 17
Figure 13. Jackson County and Sub-Areas—Total Housing Units (2000 and 2010) ..... 18
Figure 14. Jackson County and Sub-Areas—Persons per Household (PPH) and Occupancy Rate ..... 19
Figure 15. Jackson County—Total Forecast Population by Five-year Intervals (2018-2068) ..... 22
Figure 16. Jackson County and Larger Sub-Areas—Forecast Population and AAGR ..... 23
Figure 17. Jackson County and Smaller Sub-Areas—Forecast Population and AAGR ..... 24
Figure 18. Jackson County—Average Annual Net In/Out-Migration (2000-2010, 2010-2020, and 2020-2043) ..... 25
Figure 19. Jackson County—Age Structure of the Population (2018, 2030, and 2043) ..... 26
Figure 20. Jackson County—Components of Population Change (2015-2045) ..... 26
Figure 21. Jackson County—Population by Five-Year Age Group ..... 47
Figure 22. Jackson County's Sub-Areas—Total Population ..... 47

## Modified Methodology

The Population Research Center, in consultation with DLCD, has identified cost savings associated with a modified methodology for the latter half of the 50-year forecast period (years 26 to 50). Based on feedback we have received, a 25-year forecast fulfills most requirements for local planning purposes and, in an effort to improve the cost effectiveness of the program; we will place more focus on years 1 through 25. Additionally, the cost savings from this move will allow DLCD to utilize additional resources for local government grants. To clarify, we use forecast methods to produce sub-area and county populations for the first 25 years and a modified projection method for the remaining 25 years. The description of our forecast methodology can be accessed through the forecast program website (www.pdx.edu/prc/opfp), while the summary of our modified projection method is below.

For years 26-50, PRC projects the county population using the annual growth rate from the 24$^{th}$-25$^{th}$ year. For example, if we forecast a county to grow .4% between the 24th and 25th year of the forecast, we would project the county population thereafter using a .4% AAGR. To allocate the projected county population to its sub-areas, we extrapolate the change in sub-area shares of county population observed in years 1-25 and apply them to the projected county population.

## Comparison to Cycle 1 (2015-17)

To keep up to date with local trends and shifting demands, OPFP regularly updates coordinated population forecasts for Oregon's areas. Beyond the modification to our methodology and additional forecast region (from three regions to four), there are differences between the 2018 updated forecast for Jackson County and the 2015 version. The county level forecast is consistent with last round, though there are differences amongst the sub-areas. A number of Jackson County's sub-areas have grown at a slower pace than what we anticipated in 2015. As a result, our expectations of future sub-area shares of county population are different from last round. Central Point, Medford, and the area outside the UGBs are expected to capture larger shares of Jackson County's future population, while shares for all other sub-areas are consistent to or smaller than shares from last round. The full breakdown of differences by county and sub-area is stored here: www.pdx.edu/prc/cycle-2-region-1-documents.

# Executive Summary

## Historical

Different parts of the county experience different growth patterns. Local trends within UGBs and the area outside them collectively influence population growth rates for the county as a whole.

Jackson County's total population grew rapidly in the 2000s, with an average annual growth rate of just over 1 percent (**Figure 1**); however, some of its sub-areas experienced faster population. Central Point and Eagle Point posted the highest average annual growth rates at 2.9 and 5.6 percent, respectively, during the 2000 to 2010 period, while Jacksonville and Shady Cove also experienced growth rates above that of the county as a whole. All other sub-areas experienced average annual growth rates at or below that of the county as a whole.

Jackson County's positive population growth in the 2000s was largely the result of substantial net in-migration. An aging population not only led to an increase in deaths but also resulted in a smaller proportion of women in their childbearing years. This, along with more women having children at older ages has led to births stagnating in recent years. A larger number of births relative to deaths caused natural increase (more births than deaths) in every year from 2000 to 2014, though increasing deaths and stagnating births has transitioned the county to a natural decrease since 2015. Even still, net in-migration is far outpacing natural decrease, leading to steady population growth in more recent years (2012-15) (**Figure 12**).

## Forecast

Total population in Jackson County, as a whole as well as within its sub-areas, will likely grow at a faster pace in the near-term (2018 to 2043) compared to the long-term (**Figure 1**). The tapering of growth rates is largely driven by a growing natural decrease that will cut into population growth from net in-migration. Jackson County's total population is forecast to increase by nearly 53,000 over the next 25 years (2018-2043) and by more than 101,500 over the entire 50 year forecast period (2018-2068).

**Figure 1. Jackson County and Sub-Areas—Historical and Forecast Populations, and Average Annual Growth Rates (AAGR)**

| | Historical | | | Forecast | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| | 2000 | 2010 | AAGR (2000-2010) | 2018 | 2043 | 2068 | AAGR (2010-2018) | AAGR (2018-2043) | AAGR (2043-2068) |
| **Jackson County** | **181,795** | **203,340** | ***1.1%*** | **219,270** | **272,226** | **320,852** | ***0.9%*** | ***0.9%*** | ***0.3%*** |
| Ashland | 20,023 | 20,626 | *0.3%* | 21,501 | 23,625 | 24,177 | *0.5%* | *0.4%* | *0.1%* |
| Butte Falls | 440 | 423 | *-0.4%* | 419 | 444 | 452 | *-0.1%* | *0.2%* | *0.1%* |
| Central Point | 13,310 | 17,736 | *2.9%* | 19,101 | 27,803 | 38,008 | *0.9%* | *1.5%* | *1.3%* |
| Eagle Point | 4,952 | 8,508 | *5.6%* | 9,188 | 14,114 | 20,172 | *0.9%* | *1.7%* | *1.4%* |
| Gold Hill | 1,173 | 1,228 | *0.5%* | 1,234 | 1,382 | 1,477 | *0.1%* | *0.5%* | *0.3%* |
| Jacksonville | 2,256 | 2,785 | *2.1%* | 2,985 | 4,203 | 5,643 | *0.8%* | *1.4%* | *1.2%* |
| Medford | 67,865 | 76,581 | *1.2%* | 82,566 | 108,638 | 136,046 | *0.9%* | *1.1%* | *0.9%* |
| Phoenix | 4,379 | 4,774 | *0.9%* | 4,861 | 5,967 | 7,124 | *0.2%* | *0.8%* | *0.7%* |
| Rogue River | 2,544 | 2,714 | *0.6%* | 2,846 | 3,468 | 4,076 | *0.6%* | *0.8%* | *0.6%* |
| Shady Cove | 2,528 | 3,050 | *1.9%* | 3,288 | 4,338 | 5,533 | *0.9%* | *1.1%* | *1.0%* |
| Talent | 5,683 | 6,123 | *0.7%* | 6,416 | 8,386 | 10,617 | *0.6%* | *1.1%* | *0.9%* |
| Outside UGBs | 56,116 | 58,658 | *0.4%* | 64,865 | 69,857 | 67,527 | *1.2%* | *0.3%* | *-0.1%* |

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

*Note: For simplicity each UGB is referred to by its primary city's name.*

## 14-Year Population Forecast

In accordance with House Bill 2254, which streamlined the UGB process based on long-term housing and employment needs, **Figure 2** provides a 14-year population forecast (2018-2032) for the County and its sub-areas. Populations at the 14th year of the forecast were interpolated using the average annual growth rate between the 2030-2035 period. The population interpolation template is stored here: www.pdx.edu/prc/cycle-2-region-1-documents.

**Figure 2. Jackson County and Sub-Areas—14-Year Population Forecast**

| | 2018 | 2032 | 14-Year Change | AAGR (2018-2032) |
|---|---|---|---|---|
| **Jackson County** | **219,270** | **250,815** | **31,546** | ***1.0%*** |
| Ashland | 21,501 | 23,337 | 1,836 | *0.6%* |
| Butte Falls | 419 | 430 | 10 | *0.2%* |
| Central Point | 19,101 | 23,662 | 4,562 | *1.5%* |
| Eagle Point | 9,188 | 11,603 | 2,415 | *1.7%* |
| Gold Hill | 1,234 | 1,319 | 85 | *0.5%* |
| Jacksonville | 2,985 | 3,594 | 609 | *1.3%* |
| Medford | 82,566 | 96,355 | 13,789 | *1.1%* |
| Phoenix | 4,861 | 5,434 | 573 | *0.8%* |
| Rogue River | 2,846 | 3,171 | 325 | *0.8%* |
| Shady Cove | 3,288 | 3,846 | 558 | *1.1%* |
| Talent | 6,416 | 7,483 | 1,068 | *1.1%* |
| Outside UGBs | 64,865 | 70,582 | 5,716 | *0.6%* |

*Note: For simplicity each UGB is referred to by its primary city's name.*

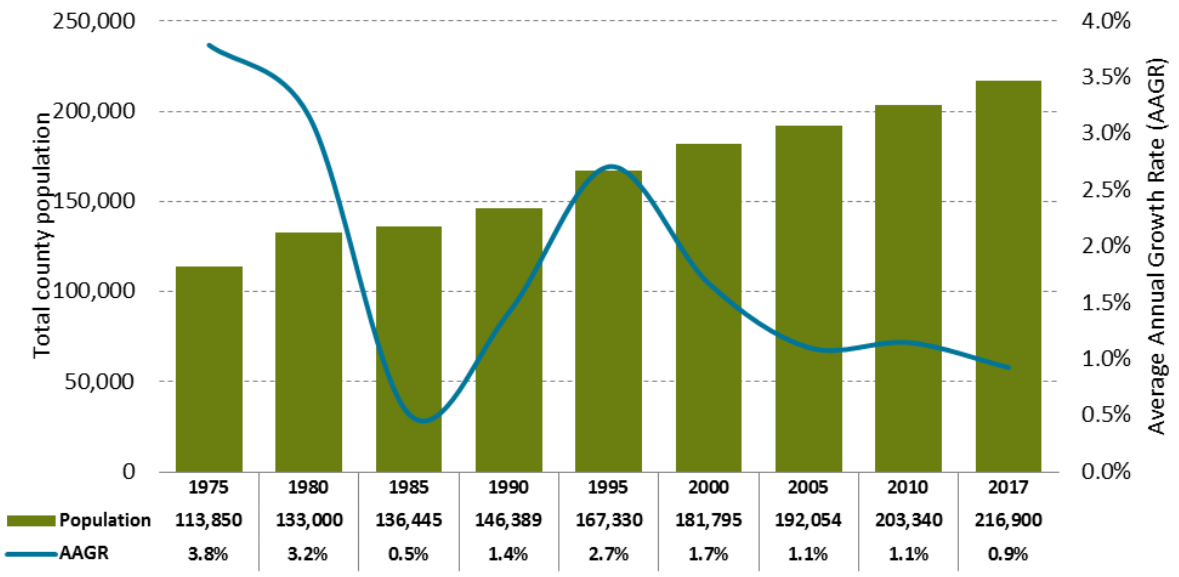
# Historical Trends

Different growth patterns occur in different parts of Jackson County. Each of Jackson County's sub-areas were examined for any significant demographic characteristics or changes in population or housing growth that might influence their individual forecasts. Factors analyzed include age composition of the population, race and ethnicity, births, deaths, migration, the number of housing units, occupancy rate, and persons per household (PPH). It should be noted that population trends of individual sub-areas often differ from those of the county as a whole. However, population growth rates for the county are collectively influenced by local trends within its sub-areas.

## Population

Jackson County's total population grew from roughly 114,000 in 1975 to nearly 217,000 in 2017 (**Figure 3**). During this 40-year period, the county experienced the highest growth rates during the late 1970s, which coincided with a period of relative economic prosperity. During the early 1980s challenging economic conditions, both nationally and within the county, led to a decline in population growth rates. During the early 1990s population growth rates again increased but challenging economic conditions late in the decade again yielded declines. Following the turn of the century, Jackson County has experienced strong population growth between 2000 and 2017—averaging around 1 percent per year.

**Figure 3. Jackson County—Total Population by Five-year Intervals (1975-2017)**




Sources: U.S. Census Bureau, 1980, 1990, 2000, and 2010 Censuses; Population Research Center (PRC), July 1st Annual Estimates 1975, 1985, 1995, 2005 and 2017.

During the 2000s, Jackson County's average annual population growth rate stood at 1.1 percent (**Figure 4**). Central Point and Eagle Point posted the highest average annual growth rates in the county at 2.9 and 5.6 percent, respectively, while Jacksonville and Shady Cove also grew faster than the county as a whole (around 2 percent). Ashland and Gold Hill experienced minimal population growth, with growth

rates at or below half a percent. Only Butte Falls saw a slight population decline, recording an average annual growth rate of -0.4 percent.

**Figure 4. Jackson County and Sub-areas—Total Population and Average Annual Growth Rate (AAGR) (2000 and 2010)[1]**

| | 2000 | 2010 | AAGR (2000-2010) | Share of County 2000 | Share of County 2010 | Change (2000-2010) |
|---|---|---|---|---|---|---|
| *Jackson County* | *181,795* | *203,340* | *1.1%* | *62.9%* | *65.2%* | *2.3%* |
| Ashland | *20,023* | *20,626* | 0.3% | 11.0% | 10.1% | -0.9% |
| Butte Falls | *440* | *423* | -0.4% | 0.2% | 0.2% | 0.0% |
| Central Point | *13,310* | *17,736* | 2.9% | 7.3% | 8.7% | 1.4% |
| Eagle Point | *4,952* | *8,508* | 5.6% | 2.7% | 4.2% | 1.5% |
| Gold Hill | *1,173* | *1,228* | 0.5% | 0.6% | 0.6% | 0.0% |
| Jacksonville | *2,256* | *2,785* | 2.1% | 1.2% | 1.4% | 0.1% |
| Medford | *67,865* | *76,581* | 1.2% | 37.3% | 37.7% | 0.3% |
| Phoenix | *4,379* | *4,774* | 0.9% | 2.4% | 2.3% | -0.1% |
| Rogue River | *2,544* | *2,714* | 0.6% | 1.4% | 1.3% | -0.1% |
| Shady Cove | *2,528* | *3,050* | 1.9% | 1.4% | 1.5% | 0.1% |
| Talent | *5,683* | *6,123* | 0.7% | 3.1% | 3.0% | -0.1% |
| Outside UGBs | *56,116* | *58,658* | 0.4% | 30.9% | 28.8% | -2.0% |

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

*Note: For simplicity each UGB is referred to by its primary city's name.*

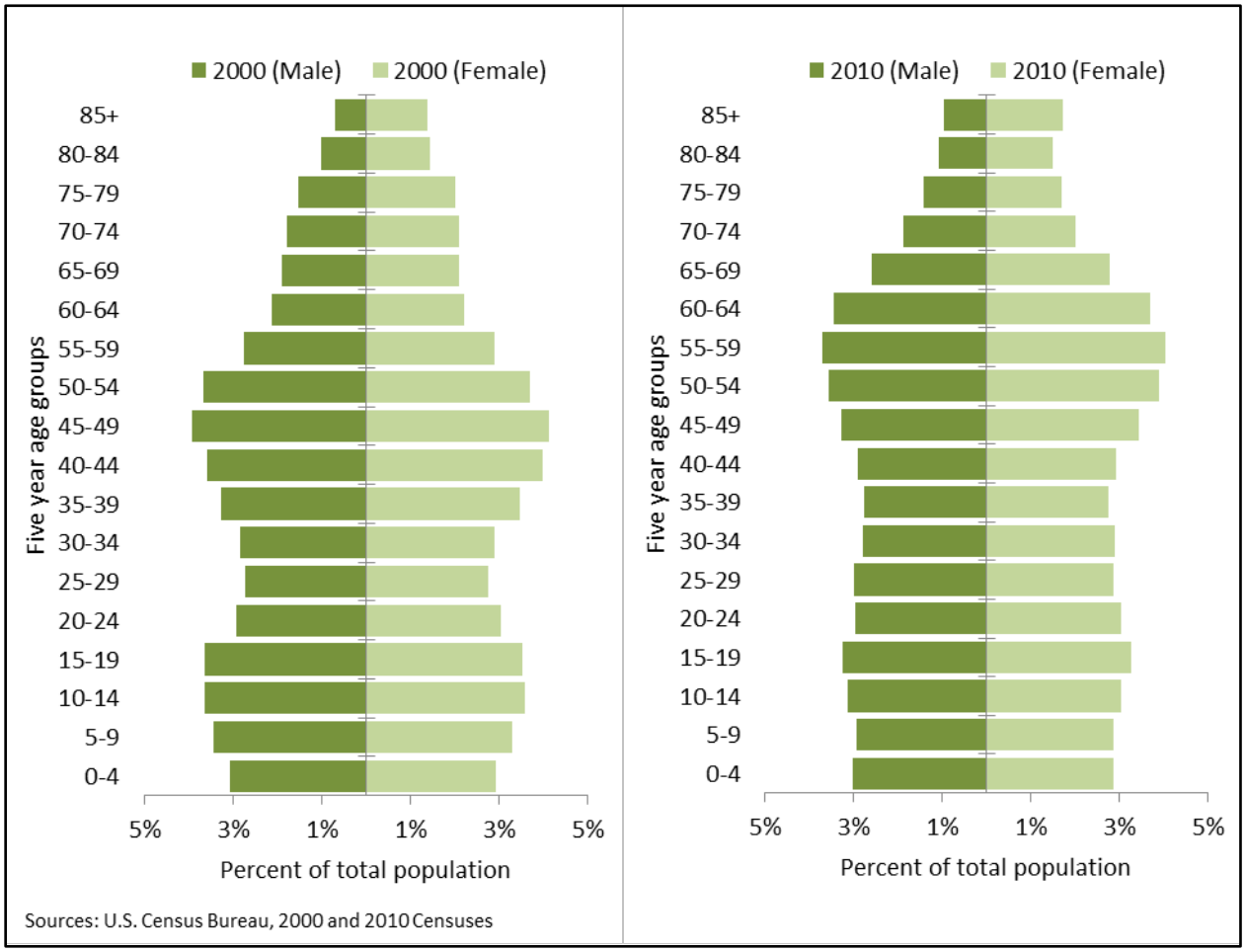
## Age Structure of the Population

Similar to most areas across Oregon, Jackson County's population is aging. An aging population significantly influences the number of deaths but also yields a smaller proportion of women in their childbearing years, which may result in a slowdown or decline in births. The shift in age structure from 2000 to 2010 illustrates this phenomenon (**Figure 5**). Further underscoring the countywide trend in aging, the median age in Jackson County increased from 39.2 in 2000 to 42.1 in 2010[2].

[1] When considering growth rates and population growth overall, it should be noted that a slowing of growth rates does not necessarily correspond to a slowing of population growth in absolute numbers. For example, if a UGB with a population of 100 grows by another 100 people, it has doubled in population. If it then grows by another 100 people during the next year, its relative growth is half of what it was before even though absolute growth stays the same.

[2] Median age is sourced from the U.S. Census Bureau's 2000 and 2010 Censuses.

**Figure 5. Jackson County—Age Structure of the Population (2000 and 2010)**




## Race and Ethnicity

While the statewide population is aging, another demographic shift is occurring across Oregon: minority populations are growing as a share of total population. A growing minority population affects both the number of births and average household size. The Hispanic share of total population within Jackson County increased from 2000 to 2010 (**Figure 6**), while the White, non-Hispanic share deceased over the same time period. This increase in the Hispanic population and other minority populations brings with it several implications for future population change. First, both nationally and at the state level, fertility rates among Hispanic and minority women tend to be higher than among White, non-Hispanic women. However, it is important to note more recent trends show these rates are quickly decreasing. Second, Hispanic and minority households tend to be larger relative to White, non-Hispanic households.

**Figure 6. Jackson County—Hispanic or Latino and Race (2000 and 2010)**

| Hispanic or Latino and Race | 2000 | | 2010 | | Absolute Change | Relative Change |
|---|---|---|---|---|---|---|
| *Total population* | 181,269 | 100.0% | 203,206 | 100.0% | 21,937 | 12.1% |
| Hispanic or Latino | 12,126 | 6.7% | 21,745 | 10.7% | 9,619 | 79.3% |
| Not Hispanic or Latino | 169,143 | 93.3% | 181,461 | 89.3% | 12,318 | 7.3% |
| White alone | 160,795 | 88.7% | 170,023 | 83.7% | 9,228 | 5.7% |
| Black or African American alone | 674 | 0.4% | 1,227 | 0.6% | 553 | 82.0% |
| American Indian and Alaska Native alone | 1,782 | 1.0% | 1,874 | 0.9% | 92 | 5.2% |
| Asian alone | 1,583 | 0.9% | 2,304 | 1.1% | 721 | 45.5% |
| Native Hawaiian and Other Pacific Islander alone | 291 | 0.2% | 562 | 0.3% | 271 | 93.1% |
| Some Other Race alone | 198 | 0.1% | 229 | 0.1% | 31 | 15.7% |
| Two or More Races | 3,820 | 2.1% | 5,242 | 2.6% | 1,422 | 37.2% |

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

## Births

Historical fertility rates for Jackson County do not mirror statewide trends in Oregon as a whole. Fertility for women over 30 increased for the county and state (**Figure 8**) and, as a result, Total fertility rates increased in the former from 2000 to 2010 (**Figure 7**), while they declined for the latter over the same time period. Total fertility in the county and state remain below replacement fertility (2.1), indicating that future cohorts of women in their birth-giving years will shrink overtime without net in-migration.

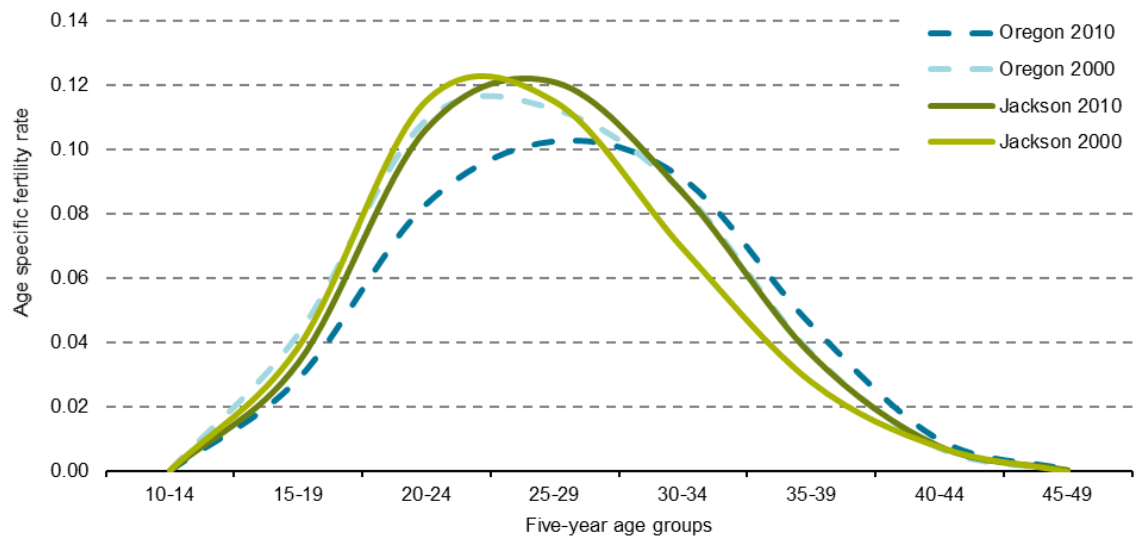
**Figure 7. Jackson County and Oregon—Total Fertility Rates (2000 and 2010)**

**Total Fertility Rate (TFR)**

| | 2000 | 2010 |
|---|---|---|
| **Jackson County** | 1.87 | 1.96 |
| **Oregon** | 1.98 | 1.81 |

*Sources: U.S. Census Bureau, 2000 and 2010 Censuses.*
*Oregon Health Authority, Center for Health Statistics.*
*Calculations by Population Research Center (PRC).*

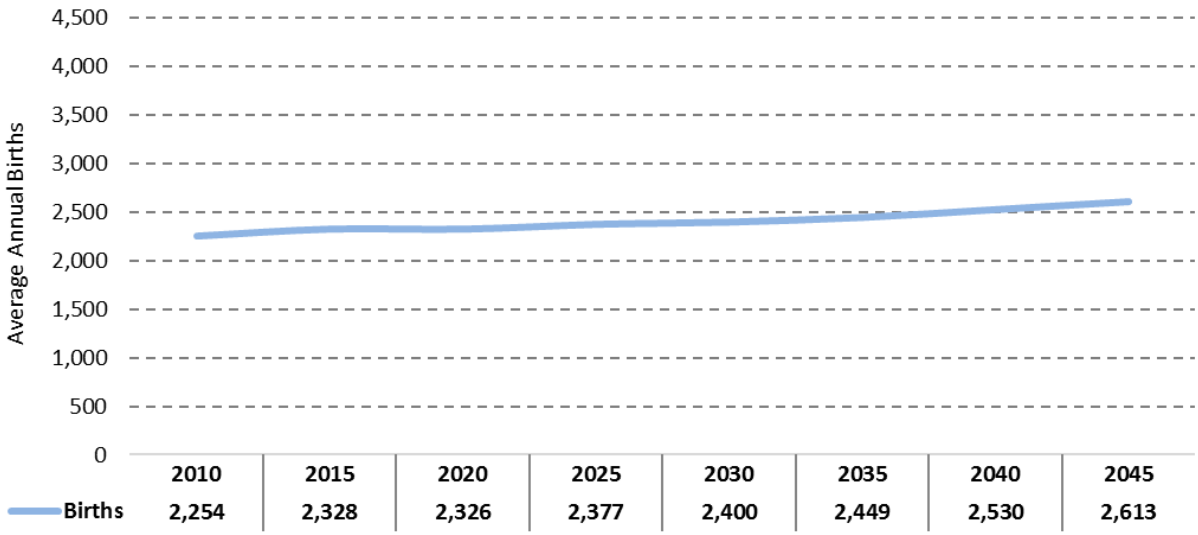
**Figure 8. Jackson County—Age Specific Fertility Rate (2000 and 2010)**




Sources: U.S. Census Bureau, 2000 and 2010 Censuses. PRC Estimates. Oregon Health Authority, Center for Health Statistics. Calculations and Forecast by Population Research Center (PRC).

**Figure 9** shows the number of historic and forecasted births for the county. The number of annual births from 2000-10 to 2010-15 remained stable. Due a shrinking cohort of women in their birth giving years, births are expected to remain fairly stable throughout the forecast period, despite population growth.

**Figure 9. Jackson County—Average Annual Births (2010-2045)**

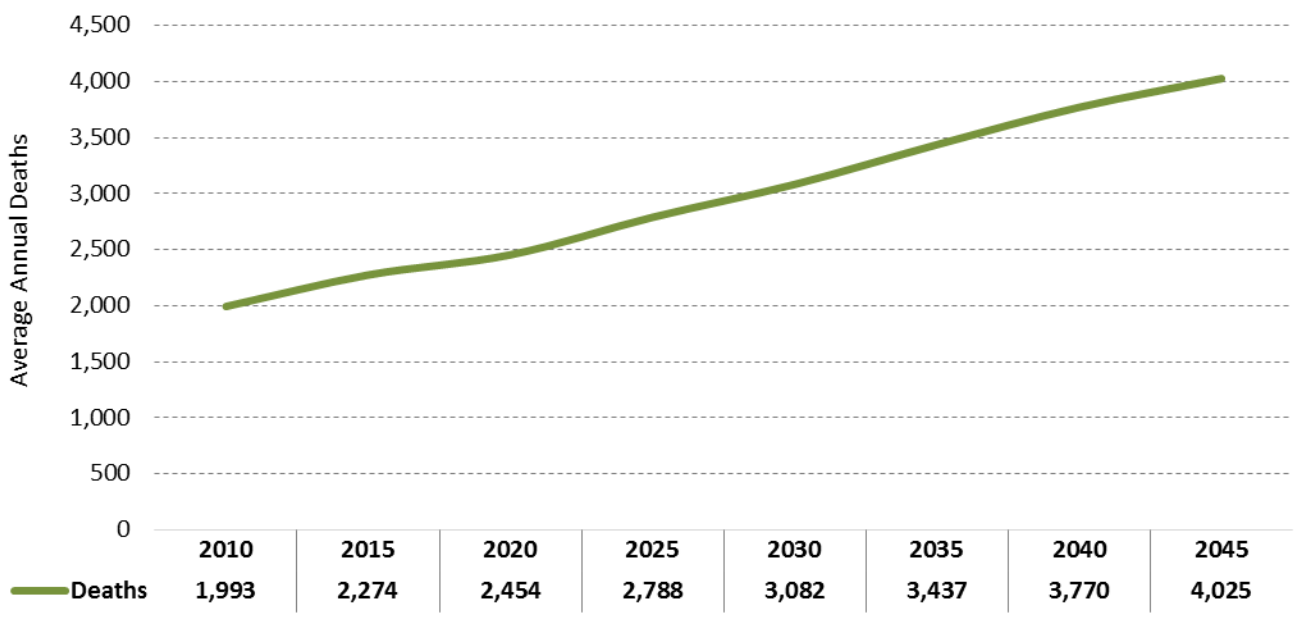



Sources: Oregon Health Authority, Center for Health Statistics. Calculations and Forecast by Population Research Center (PRC).
Note: The years signify the end of the period for which average annual numbers were calculated. The average annual numbers for "2010" were calculated for the 2000-2010 period, with the remaining years calculated for their preceding five-year periods.

## Deaths

The population in the county, as a whole, is aging and contrary to the statewide trend, people of all ages are not necessarily living longer[3]. For both Jackson County and Oregon the survival rates changed little between 2000 and 2010, underscoring the fact that mortality is the most stable component, relative to birth and migration rates, of population change. Average annual deaths increased from 2000-10 and 2010-15 and are expected to increase steadily overtime (**Figure 10**).

**Figure 10. Jackson County—Average Annual Deaths (2010-2045)**




Sources: Oregon Health Authority, Center for Health Statistics. Calculations and Forecast by Population Research Center (PRC).
Note: The years signify the end of the period for which average annual numbers were calculated. The average annual numbers for "2010" were calculated for the 2000-2010 period, with the remaining years calculated for their preceding five-year periods.

## Migration

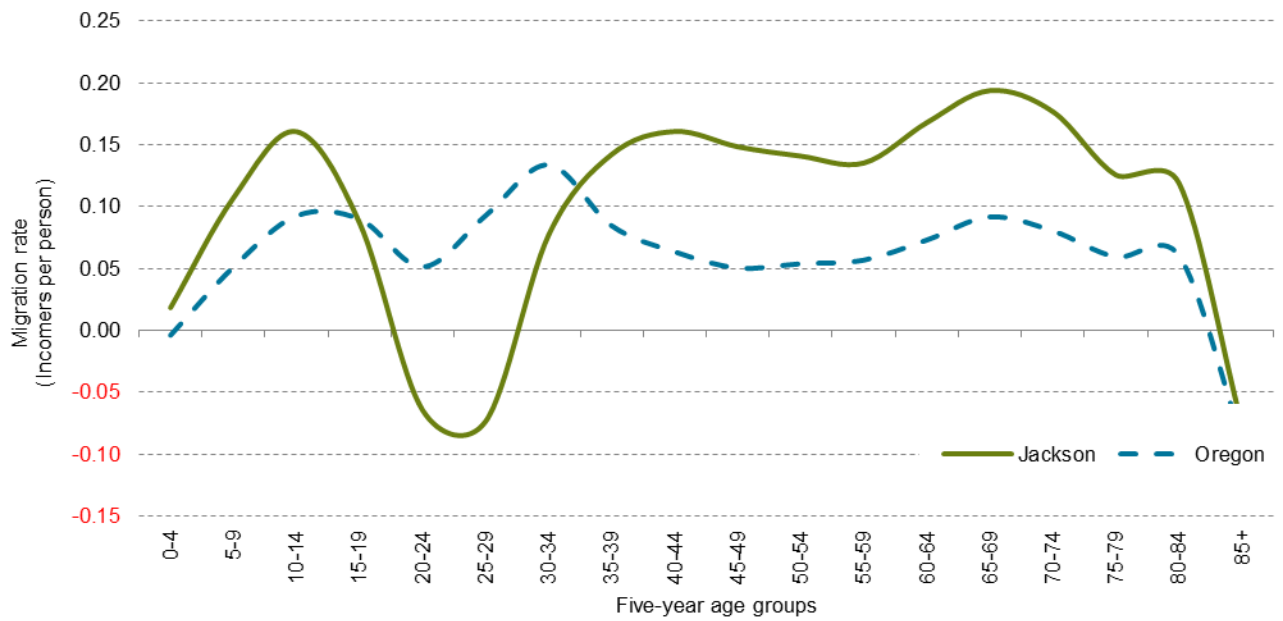
The propensity to migrate is strongly linked to age and stage of life. As such, age-specific migration rates are critically important for assessing these patterns across five-year age cohorts. **Figure 11** shows the historical age-specific migration rates by five-year age group, both for Jackson County and for Oregon. The migration rate is shown as the number of net migrants per person by age group.

Jackson County's migration rates reflect the patterns of many other Oregon counties. Young adults (20-29) leave the county seeking higher education and employment opportunities, but return in their 30's

[3] Researchers have found evidence for a widening rural-urban gap in life expectancy. This gap is particularly apparent between race and income groups and may be one explanation for the decline in life expectancy in the 2000s. See the following research article for more information. *Singh, Gopal K., and Mohammad Siahpush. "Widening rural-urban disparities in life expectancy, US, 1969-2009." American Journal of Preventative Medicine 46, no. 2 (2014): e19-e29.*

and 40's with their children. Retirees made up a large proportion of net in-migrants in the 00's, but left the county shortly thereafter to areas with end-of-life care.

**Figure 11. Jackson County and Oregon—Age Specific Migration Rates (2000-2010)**

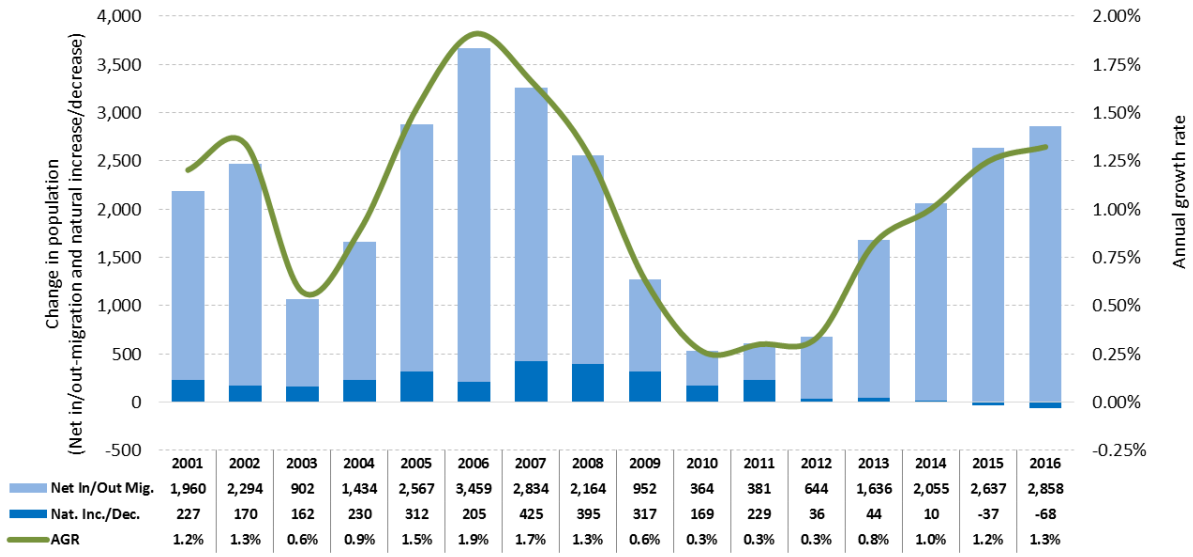



Sources: U.S. Census Bureau, 2000 and 2010 Censuses. Calculated by Population Research Center (PRC).

## Historical Trends in Components of Population Change

In summary, Jackson County's positive population growth during the 2000s was the result of substantial net in-migration (**Figure 12**). The more births than deaths led to natural increase for Jackson County in every year from 2000 to 2014, but has since transitioned to a natural decrease. While net in-migration fluctuated dramatically during the early and late years of the last decade, the number of in-migrants recently (2012-16) has been increasing, far outweighing the emerging natural decrease. With this recent increase, net in-migration accounts for all of the population growth in the county, leading to strong population growth.

**Figure 12. Jackson County—Components of Population Change (2001-2016)**




| | 2001 | 2002 | 2003 | 2004 | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Net In/Out Mig. | 1,960 | 2,294 | 902 | 1,434 | 2,567 | 3,459 | 2,834 | 2,164 | 952 | 364 | 381 | 644 | 1,636 | 2,055 | 2,637 | 2,858 |
| Nat. Inc./Dec. | 227 | 170 | 162 | 230 | 312 | 205 | 425 | 395 | 317 | 169 | 229 | 36 | 44 | 10 | -37 | -68 |
| AGR | 1.2% | 1.3% | 0.6% | 0.9% | 1.5% | 1.9% | 1.7% | 1.3% | 0.6% | 0.3% | 0.3% | 0.3% | 0.8% | 1.0% | 1.2% | 1.3% |

Sources: Population Research Center, July 1st Annual Estimates 2001-2016 Oregon Health Authority, Center for Health Statistics. Calculated by Population Research Center (PRC).

## Housing and Households

The total number of housing units in Jackson County increased rapidly during the middle years of this last decade (2000 to 2010), but this growth slowed with the onset of the Great Recession in 2008. Over the entire 2000 to 2010 period, the total number of housing units increased by 20.1 percent countywide; this was more than 15,000 new housing units (**Figure 13**). Medford captured the largest share of the growth in total housing units, adding nearly 5,000 units over the last decade. Central Point also saw a large share of countywide housing growth, adding 2,130 units and increasing as a share of total countywide housing units by 1.2 percent. In terms of relative housing growth, Eagle Point had the highest growth rate; its total housing units increased nearly 93 percent (1,746 housing units) by 2010, and its share of countywide housing units increased by 1.5 percent.

Housing growth rates may differ from population growth rates because (1) the numbers of total housing units are smaller than the numbers of people; (2) the UGB has experienced changes in the average number of persons per household; or (3) occupancy rates have changed (typically most pronounced in coastal locations with vacation-oriented housing). However, the patterns of population and housing change in Jackson County are relatively similar.

**Figure 13. Jackson County and Sub-Areas—Total Housing Units (2000 and 2010)**

| | 2000 | 2010 | AAGR (2000-2010) | Share of County 2000 | Share of County 2010 | Change (2000-2010) |
|---|---|---|---|---|---|---|
| *Jackson County* | *75,737* | *90,937* | *1.8%* | *100.0%* | *100.0%* | *0.0%* |
| Ashland | 9,289 | 10,735 | 1.5% | 12.3% | 11.8% | -0.5% |
| Butte Falls | 170 | 188 | 1.0% | 0.2% | 0.2% | 0.0% |
| Central Point | 5,072 | 7,202 | 3.6% | 6.7% | 7.9% | 1.2% |
| Eagle Point | 1,882 | 3,628 | 6.8% | 2.5% | 4.0% | 1.5% |
| Gold Hill | 520 | 557 | 0.7% | 0.7% | 0.6% | -0.1% |
| Jacksonville | 1,116 | 1,548 | 3.3% | 1.5% | 1.7% | 0.2% |
| Medford | 28,215 | 33,166 | 1.6% | 37.3% | 36.5% | -0.8% |
| Phoenix | 2,017 | 2,251 | 1.1% | 2.7% | 2.5% | -0.2% |
| Rogue River | 1,309 | 1,462 | 1.1% | 1.7% | 1.6% | -0.1% |
| Shady Cove | 1,200 | 1,533 | 2.5% | 1.6% | 1.7% | 0.1% |
| Talent | 2,453 | 2,853 | 1.5% | 3.2% | 3.1% | -0.1% |
| Outside UGBs | 22,494 | 25,814 | 1.4% | 29.7% | 28.4% | -1.3% |

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

*Note: For simplicity each UGB is referred to by its primary city's name.*

Average household size, or PPH, in Jackson County was 2.4 in 2010, a small decline from 2000 (**Figure 14**). Jackson County's PPH in 2010 was slightly lower than for Oregon as a whole, which had a PPH of 2.5. PPH varied across the county's UGBs, with all of them falling between 2.0 and 2.6 persons per household. In 2010 the highest PPH was in Central Point and Eagle Point with 2.6 and the lowest in Ashland and Jacksonville at 2.0.

Occupancy rates tend to fluctuate more than PPH. This is particularly true in smaller UGBs where fewer housing units allow for larger relative changes in occupancy rates. From 2000 to 2010 the occupancy rate in Jackson County decreased slightly (**Figure 14**). A drop in occupancy rates was uniform across almost all sub-areas, with Butte Falls experiencing the highest decline at 5.8 percent between 2000 and 2010. Only Gold Hill saw an increase in occupancy rates, increasing by 2.5 percent during this time period.

**Figure 14. Jackson County and Sub-Areas—Persons per Household (PPH) and Occupancy Rate**

| | Persons Per Household (PPH) | | | Occupancy Rate | | |
|---|---|---|---|---|---|---|
| | 2000 | 2010 | Change 2000-2010 | 2000 | 2010 | Change 2000-2010 |
| *Jackson County* | *2.5* | *2.4* | *-3.2%* | *94.4%* | *91.4%* | *-3.1%* |
| Ashland | 2.5 | 2.0 | -18.0% | 94.2% | 90.0% | -4.1% |
| Butte Falls | 2.2 | 2.5 | 18.5% | 94.1% | 88.3% | -5.8% |
| Central Point | 2.8 | 2.6 | -4.9% | 96.8% | 93.8% | -3.0% |
| Eagle Point | 2.7 | 2.6 | -2.6% | 93.5% | 89.5% | -4.0% |
| Gold Hill | 2.8 | 2.4 | -15.1% | 89.8% | 92.3% | 2.5% |
| Jacksonville | 2.5 | 2.0 | -19.5% | 93.6% | 89.0% | -4.7% |
| Medford | 2.1 | 2.4 | 13.5% | 95.4% | 92.8% | -2.6% |
| Phoenix | 2.5 | 2.3 | -8.4% | 94.5% | 93.2% | -1.4% |
| Rogue River | 2.3 | 2.1 | -10.2% | 92.7% | 90.2% | -2.5% |
| Shady Cove | 2.1 | 2.3 | 8.1% | 89.8% | 88.3% | -1.5% |
| Talent | 2.3 | 2.3 | -2.4% | 96.1% | 93.4% | -2.7% |
| Outside UGBs | 2.4 | 2.5 | 4.1% | 93.3% | 89.7% | -3.6% |

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

*Note: For simplicity each UGB is referred to by its primary city's name.*

# Assumptions for Future Population Change

Evaluating past demographic trends provides clues about what the future will look like and helps determine assumptions of likely scenarios for population change. Assumptions about fertility, mortality, and migration were developed for Jackson County's forecast and for each of its larger sub-areas[4]. Population change for smaller sub-areas is determined by the change in the number of total housing units, PPH, occupancy rates, and group quarters population. Assumptions around these components of growth are derived from observations of historical building patterns, current plans for future housing development, and household demographics. Our forecast period is 2018-2068.

Jackson County's larger sub-areas include Ashland, Central Point, Eagle Point, and Medford, and smaller sub-areas include Butte Falls, Gold Hill, Jacksonville, Phoenix, Rogue River, Shady Cove, and Talent.

## Assumptions for the County and Larger Sub-Areas

During the forecast period, the population in Jackson County is expected to age more quickly during the first half of the forecast period and then remain relatively stable over the forecast horizon. Total fertility rates are expected to slightly decline throughout the forecast period (1.93 in 2015 to 1.88 in 2043), and fertility rates for women under 30 are expected to decline even more. Our assumptions of fertility for the county's larger sub-areas vary and are detailed in Appendix B.

Changes in survival rates are more stable than fertility and migration rates; overall life expectancy is expected to increase slightly over the forecast period. In spite of the rent, Jackson County's aging population will increase the overall number of deaths throughout the forecast period.

Migration is the most volatile and challenging demographic component to forecast due to the many factors influencing migration patterns. Economic, social, and environmental factors such as employment, educational opportunities, housing availability, family ties, cultural affinity, climate change, and natural amenities occurring both inside and outside the study area can affect both the direction and the volume of migration.

We assume rates will change in line with historic trends unique to Jackson County. Net out-migration of younger adults and net in-migration of middle-aged individuals will persist throughout the forecast period. Countywide average annual net in-migration is expected to increase from 2,928 net in-migrants in 2015 to 3,196 net in-migrants in 2043. Net in-migration is expected to curb the results of a growing natural decrease, accounting for the all of Jackson County's population growth throughout the entire forecast period.

[4] County sub-areas with populations greater than 7,000 in the forecast launch year were forecast using the cohort-component method. County sub-areas with populations less than 7,000 in forecast launch year were forecast using the housing-unit method. See Glossary of Key Terms at the end of this report for a brief description of these methods or refer to the *Methods* document for a more detailed description of these forecasting techniques.

## Assumptions for Smaller Sub-Areas

Rates of population growth for the smaller UGBs are determined by corresponding growth in the number of housing units as well as changes in housing occupancy rates and PPH. The change in housing unit growth is much more variable than change in housing occupancy rates or PPH.

Occupancy rates and PPH are assumed to stay relatively stable over the forecast period. Smaller household size is associated with an aging population in Jackson County and its sub-areas.

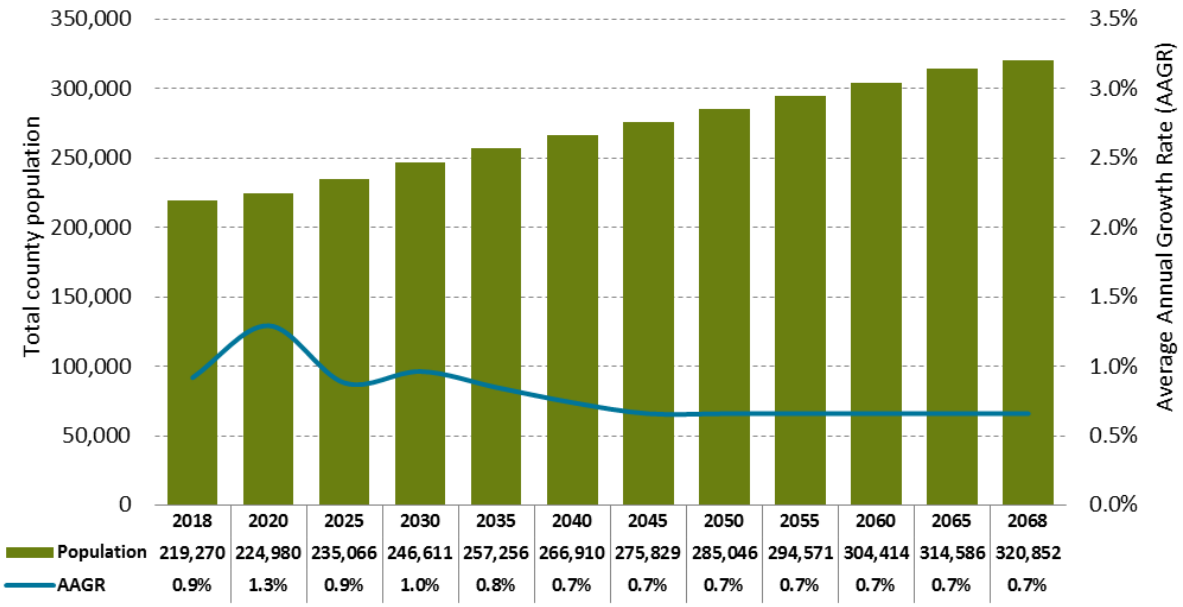
If planned housing units were reported in the surveys, we accounted for them being constructed over the next 5-15 years (or as specified by local officials). Finally, for sub-areas where population growth has been flat or declining, and there is no planned housing construction, we temper population change.

## Forecast Trends

Under the most-likely population growth scenario for Jackson County, countywide and sub-area populations are expected to increase over the forecast period. The countywide population growth rate is forecast to peak in 2020 and then slowly decline throughout the forecast period. A reduction in population growth rates is driven by both (1) an aging population—contributing to steady increase in deaths—as well as (2) in-migration tapering in the long run to account for uncertainty.

Jackson County's total population is forecast to grow by 101,582 persons (46 percent) from 2018 to 2068, which translates into a total countywide population of 320,852 in 2068 (**Figure 15**). The population is forecast to grow at the highest rate— 1 percent per year—during the near-term (2018-2025). This anticipated population growth in the near-term is based on two core assumptions: (1) strong net in-migration and housing construction will continue into 2020; (2) net in-migration of retirees will continue. Over 4,800 in-migrants are forecasted in the near term, leaning to a continued population growth. This growth be tapered slightly by the nearly 350 more deaths than births that are forecast for the 2018-2025 period.

**Figure 15. Jackson County—Total Forecast Population by Five-year Intervals (2018-2068)**




| | 2018 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | 2050 | 2055 | 2060 | 2065 | 2068 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Population | 219,270 | 224,980 | 235,066 | 246,611 | 257,256 | 266,910 | 275,829 | 285,046 | 294,571 | 304,414 | 314,586 | 320,852 |
| AAGR | 0.9% | 1.3% | 0.9% | 1.0% | 0.8% | 0.7% | 0.7% | 0.7% | 0.7% | 0.7% | 0.7% | 0.7% |

Source: Forecast by Population Research Center (PRC).

Jackson County's four largest UGBs—Ashland, Central Point, Eagle Point, and Medford—are forecast to experience a combined population growth of nearly 42,000 from 2018 to 2043 and over 44,000 from 2043 to 2068 (**Figure 16**). The Medford UGB is expected to increase by more than 26,000 persons during the first half of the forecast period and almost 27,500 during the second half, at average annual growth rates of 1.1 percent and 0.9 percent. Both Central Point and Eagle Point are expected to increase at faster rates, with forecasted growth rates of at least 1.5 percent from 2018 to 2043 and just below 1.5

percent from 2043 to 2068. This growth translates to population increases for Central Point and Eagle Point of roughly 8,700 and 5,000, respectively, during the first half of the forecast period and 10,000 and 6,000, respectively, during the second half of the forecast period. Slower growth is expected in Ashland, where the population is expected to increase by just over 2,000 from 2018 to 2043 (0.4% AAGR) and 550 from 2043 to 2068 (0.1% AAGR). All larger UGBs, except Ashland, are projected to grow as shares of the total county population. Medford, Jackson County's largest UGB, and Central Point are expected to capture the largest shares of total countywide population growth during the entire forecast period (**Figure 16**).

The population outside the UGBs is expected to grow by almost 5,000 people from 2018 to 2043 but is expected to shrink during the second half of the forecast period, declining by more than 2,300 people from 2043 to 2068. Its share is forecast to decline over the 50-year period, composing about 30 percent of the countywide population in 2018 and 21 percent in 2068.

**Figure 16. Jackson County and Larger Sub-Areas—Forecast Population and AAGR**

| | 2018 | 2043 | 2068 | AAGR (2018-2043) | AAGR (2043-2068) | Share of County 2018 | Share of County 2043 | Share of County 2068 |
|---|---|---|---|---|---|---|---|---|
| *Jackson County* | *219,270* | *272,226* | *320,852* | *0.9%* | *0.7%* | -- | -- | -- |
| Ashland | 21,501 | 23,625 | 24,177 | *0.4%* | *0.1%* | 9.8% | 8.7% | 7.5% |
| Central Point | 19,101 | 27,803 | 38,008 | *1.5%* | *1.3%* | 8.7% | 10.2% | 11.8% |
| Eagle Point | 9,188 | 14,114 | 20,172 | *1.7%* | *1.4%* | 4.2% | 5.2% | 6.3% |
| Medford | 82,566 | 108,638 | 136,046 | *1.1%* | *0.9%* | 37.7% | 39.9% | 42.4% |
| Outside UGBs | 64,865 | 69,857 | 67,527 | *0.3%* | *-0.1%* | 29.6% | 25.7% | 21.0% |

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

*Note: For simplicity each UGB is referred to by its primary city's name.*

The smaller UGBs are expected to grow by a combined number of over 6,100 persons from 2018 to 2043 and over 6,700 from 2043 to 2068 (**Figure 17**). Combined average annual growth rates for the small UGBs mirror expected countywide growth rates, and similar to the larger UGBs and Jackson County as a whole, population growth rates are forecast to decline for the second half of the forecast period. Jacksonville is expected to experience the highest growth rates—1.4 percent from 2018 to 2043 and 1.2 percent from 2043 to 2068—adding a total of almost 2,700 people throughout the entire forecast period. Talent will experience the largest total population growth, increasing by around 4,200 over the forecast period.

**Figure 17. Jackson County and Smaller Sub-Areas—Forecast Population and AAGR**

| | 2018 | 2043 | 2068 | AAGR (2018-2043) | AAGR (2043-2068) | Share of County 2018 | Share of County 2043 | Share of County 2068 |
|---|---|---|---|---|---|---|---|---|
| *Jackson County* | *219,270* | *272,226* | *320,852* | *0.9%* | *0.7%* | -- | -- | -- |
| Butte Falls | 419 | 444 | 452 | *0.2%* | *0.1%* | 0.2% | 0.2% | 0.1% |
| Gold Hill | 1,234 | 1,382 | 1,477 | *0.5%* | *0.3%* | 0.6% | 0.5% | 0.5% |
| Jacksonville | 2,985 | 4,203 | 5,643 | *1.4%* | *1.2%* | 1.4% | 1.5% | 1.8% |
| Phoenix | 4,861 | 5,967 | 7,124 | *0.8%* | *0.7%* | 2.2% | 2.2% | 2.2% |
| Rogue River | 2,846 | 3,468 | 4,076 | *0.8%* | *0.6%* | 1.3% | 1.3% | 1.3% |
| Shady Cove | 3,288 | 4,338 | 5,533 | *1.1%* | *1.0%* | 1.5% | 1.6% | 1.7% |
| Talent | 6,416 | 8,386 | 10,617 | *1.1%* | *0.9%* | 2.9% | 3.1% | 3.3% |
| Outside UGBs | 64,865 | 69,857 | 67,527 | *0.3%* | *-0.1%* | 29.6% | 25.7% | 21.0% |

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

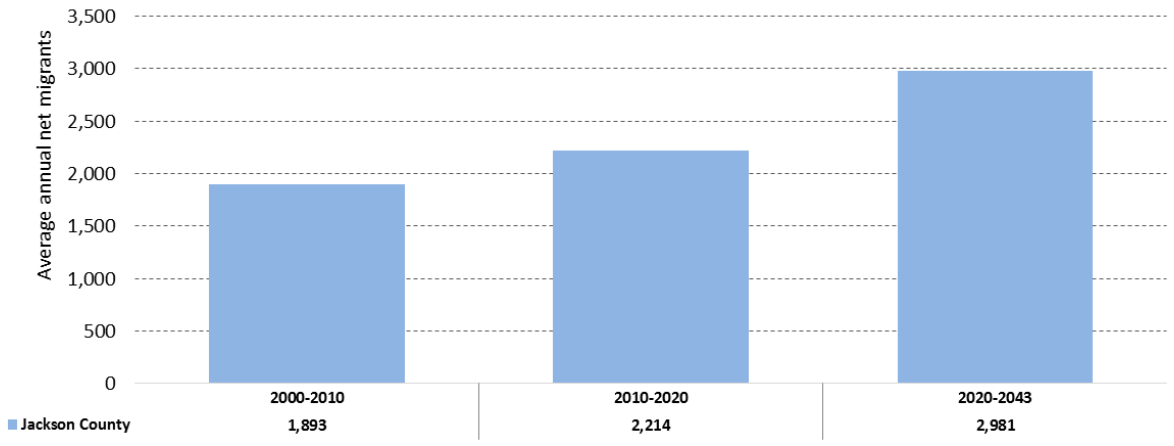
*Note: For simplicity each UGB is referred to by its primary city's name.*

Jackson County's smaller sub-areas are expected to experience fairly uniform growth. As a result, there will be little change in shares of countywide population; the smaller UBGs are expected to capture 10.2 percent of countywide population during the first half of the 50-year period and 10.7 during the second half.

## Forecast Trends in Components of Population Change

As previously discussed, the number of in-migrants is forecasted to outweigh the number of out-migrants in Jackson County, creating a positive net in-migration of new residents that is expected to persist throughout the forecast period. Furthermore, the average annual net in-migration is forecasted to increase from the near-term rate of 2,214 individuals (2010-2020) to 2,981 individuals later in the forecast (2020-2043) (**Figure 18**). The majority of these net in-migrants are expected to be middle-aged and older individuals.

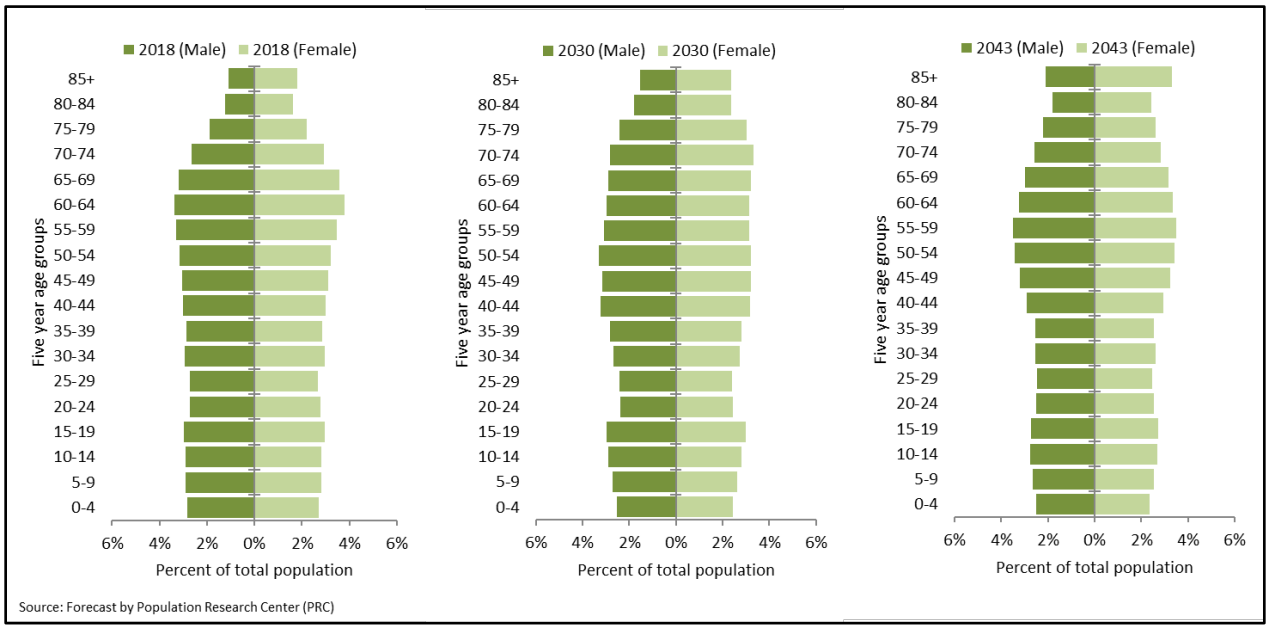
**Figure 18**. **Jackson County—Average Annual Net In/Out-Migration (2000-2010, 2010-2020, and 2020-2043)**




Sources: U.S. Census Bureau, 2000 and 2010 Censuses. Calculations and Forecast by Population Research Center (PRC).
Note: The average annual numbers were calculated for the 10 year periods (2000-2010 and 2010-2020) and the 23 year period (2020-2043).

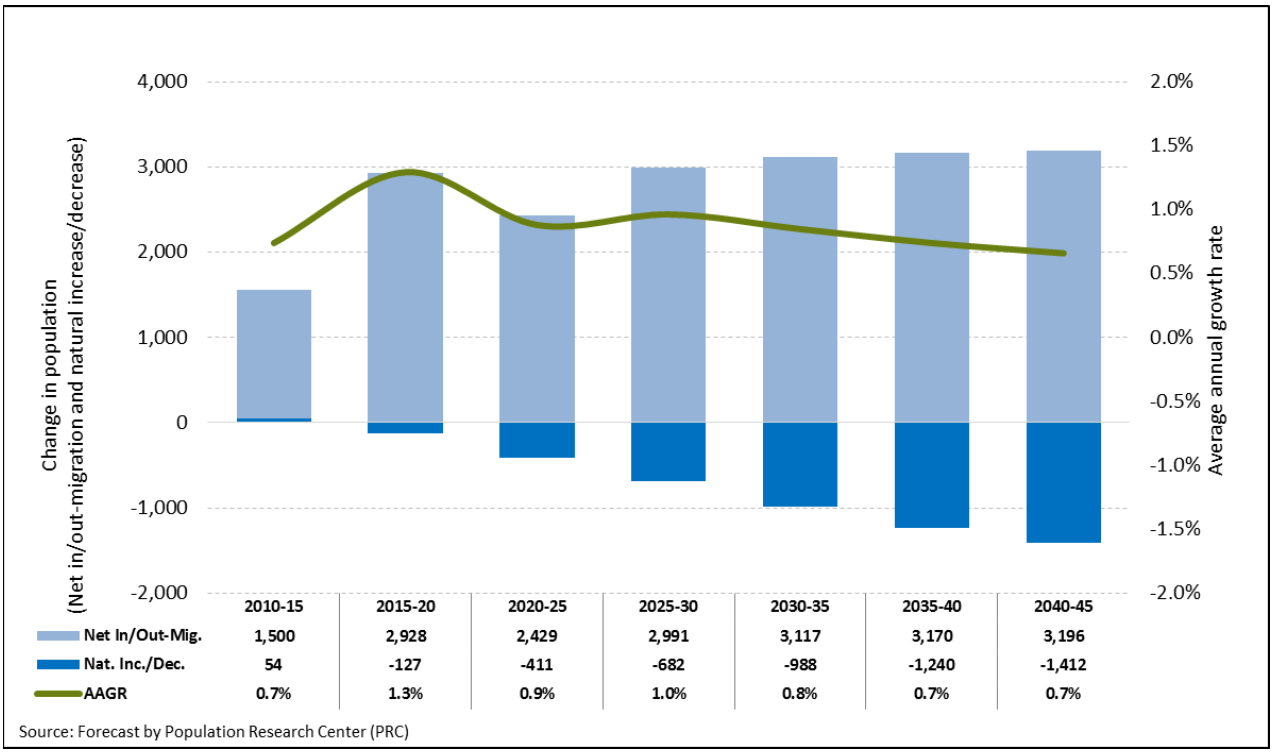
In addition to net in-migration, the other key component shaping Jackson County's forecast is the aging population. From 2018 to 2030, the proportion of the county population 65 years of age and older is forecast to grow from roughly 22 percent to 26 percent, and then to maintain that proportion through 2043 (**Figure 19**). For a more detailed look at the age structure of Jackson County's population, see the final forecast table published to the forecast program website (www.pdx.edu/prc/cycle-2-region-1-documents).

**Figure 19. Jackson County—Age Structure of the Population (2018, 2030, and 2043)**




In summary, current population growth is expected to peak around 2020 before the average annual growth rates begins to taper (**Figure 20**). Net in-migration is expected to be steady throughout the forecast period, though the magnifying natural decrease will temper this growth, resulting in moderate population growth.

**Figure 20. Jackson County—Components of Population Change (2015-2045)**



# 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.

# Appendix A: Surveys and Supporting Information

Supporting information is based on planning documents and reports, and from submissions to PRC from city officials and staff, and other stakeholders. The information pertains to characteristics of each city area, and to changes thought to occur in the future. There was one challenge to Phoenix's proposed forecast during the formal review period. PRC reviewed the challenge and adjusted the sub-area's final forecast. The cities of Ashland, Butte Falls, and Gold Hill did not submit survey responses. Talent indicated there were no updates from the 2015 survey.

| General Survey for Oregon Population Forecast Program | |
|---|---|
| Jurisdiction: City of Central Point | Date: January 11, 2018 |
| Observations about Population Composition (e.g. children, the elderly, racial and ethnic groups) | Distribution of population based on age, racial and ethnic groups remains consistent with 2010 census. |
| Observations about Housing | <u>Under Construction</u><br><br>A 245-unit multifamily development has been approved within the Twin Creeks TOD. The first phase consisting of 100-units is currently under construction with completion anticipated by the end of 2018. Phase 2 construction of 145-units will commence early 2019.<br><br>A 16-unit multifamily infill project near South Haskell Street was approved in 2016 and is nearing completion.<br><br>Final phases of the North Village (5 and 2) are completing infrastructure improvements for final plat of 90 residential lots for single-family construction.<br><br>Twin Creeks Phase 1 has final plat approval for 19 lots. All but five (5) have building permits issued for construction.<br><br><u>Approved, Pending Construction</u><br>Plans for development of the Eastside Transit Oriented Development District have been approved for 288 apartments, 30 townhomes, and 8 duplexes. This project was noted earlier but has been delayed to environmental remediation. Revised construction start is within the next 2-years.<br><br>A 50-unit multifamily development has been approved on South Haskell Street for the Housing Authority of Jackson County. The estimated start of construction is Fall 2018.<br><br><u>Housing Observation Summary</u>:<br>At this time, there are 746 units under construction or approved for development. There are an additional 84 units approved for assisted living/memory care within Twin Creeks (see reverse), and an additional 670+ units anticipated pending UGB amendment and/or submittal and approval of required master plan/subdivision applications. |

| | |
|---|---|
| Planned Housing Dev./Est. Year Completion | There is a preliminary master plan under development in the MMR zone within the Eastside TOD. Minimum density for this zone is expected to yield a minimum of 89 units.<br><br>There is a master plan under development within the LMR zone in the TOD Corridor. The preliminary housing yield is 27 single-family detached and attached housing. Submittal is anticipated in the Spring 2018/19.<br><br>Pending UGB Expansion and Annexation, there is a preliminary conceptual development plan for 137 acres to include a mix of single-family attached and detached units (570+ units). A UGB Amendment application is anticipated in Spring 2018. (See Planning Documents section for summary of Housing Element/need for additional residential acreage.)<br><br><u>Summary</u>: There are pending application to add an additional 690 estimated residential units. |
| Future Group Quarters Facilities | Pear Valley Senior Living is currently under construction and will add 60 assisted living and 24 memory care units. |
| Future Employers | Rogue Valley Microdevices has an approved CUP and Site Plan and Architectural Review to construct a 43,000 s.f. light manufacturing building. The business currently has 25 employees and is expected to double their staff following the move to Central Point. |
| Infrastructure | Pine Street is being improved to provide a more pedestrian friendly environment to support the Central Business District. The project is under construction and scheduled for completion near the end of 2018.<br><br>The Twin Creeks Rail Crossing is under construction and will provide connectivity between the Twin Creeks activity Center and Highway 99/Front Street. Completion of this project in the Spring 2018 will allow addition development within the commercial core of the Twin Creeks Master Plan area, including possibly development of a new Asante Facility, which would add to the City's employment base. |

| | |
|---|---|
| Promotions (promos) and Hindrances (hinders) to Population Growth; Other notes | Promos:<br>Available urban lands with necessary infrastructure plus a fast and efficient land use process. Costco's recent relocation to Central Point brings additional visitors to the City and has generated interest in commercial and residential development. Urban Renewal is being implemented to make improvements to the downtown, and needed infrastructure that make Central Point more attractive to business and visitors.<br><br>Hinders:<br>Economy/market; although, economic conditions appear to be improving. |
| Highlights or summary from planning documents and studies on influences and anticipation of population and housing growth. | Per the Housing Element, there is a need for the City to add 150 gross acres of residential land to the UGB. The City has approved a resolution of intent to expand the UGB into one of the City's urban reserve areas to add new residential land. There is a resolution of intent to add acreage from the CP-6A urban reserve area. The preliminary concept identifies 570 units, but this number is expected to increase to meet minimum density requirements (currently under consideration in the Land Use Element update). |

| General Survey for Oregon Population Forecast Program | |
|---|---|
| Jurisdiction: City of Eagle Point Date: 9/26/17 | |
| Observations about Population Composition (e.g. children, the elderly, racial and ethnic groups) | Majority is families and retirees, predominantly caucasian. |
| Observations about Housing | Highest demand and best supply is SF detached.<br><br>Multi-family (esp. affordable) is not a strong market here. |
| Planned Housing Dev./Est. Year Completion (for detailed information submissions please use the Housing Development Survey) | We estimate approx 100 bldg permits for new SF homes in FY 2017-18. |
| Planned future construction of Group Quarters facilities | None. |
| Future Employers Locating to the Area | Potentially 1 - 2 new employers with 5 - 10 employees each<br><br>in FY 2017-18. |
| Capacity and condition of infrastructure to accommodate growth. | Adequate capacity is in place for build-out of our current UGB. |
| Any Promotions (promos) and Hindrances (hinders) to Population Growth; Other notes | Still have surplus land within UGB for near term growth. |
| Do you have a buildable lands inventory for your area/UGB? If yes, it would be helpful if you could please share it with our center in GIS format. | Urban Reserve Analysis with BLI being completed now by Rogue Valley Council of Governments. |
| Highlights or summary from planning documents and studies on influences and anticipation of population and housing growth (including any plans for UGB expansion and the stage in the expansion process) | Areas zoned Residential Farm (min 5 acre lots) account for much of the residential capacity, and it's these areas that will need to be rezoned to Single-Family Residential to accommodate the density increase required by our agreement with the state in order to expand our UGB.<br><br>Available land for future employment growth appears to be easily accommodated in the City's existing Light Industrial and Business Park zoning districts. |

# General Survey for Oregon Population Forecast Program

Jurisdiction: City of Jacksonville Date: December 21, 2017

| | |
|---|---|
| Observations about Population Composition (e.g. children, the elderly, racial and ethnic groups) | Jacksonville has the highest median age (60.4) in Jackson County, according to the 2015 ACS 5-year estimate. The next highest point is Phoenix at 51.1. |
| Observations about Housing | Median house value well above the county average. Single-family units dominate, but accessory dwelling units are becoming more commonplace. Jacksonville currently has a deficit of multi-family zoned land |
| Planned Housing Dev./Est. Year Completion | The city recently approved a 26-lot subdivision that will be available for development after the final plat is recorded in 2018. |
| Future Group Quarters Facilities | None anticipated |
| Future Employers | None anticipated |
| Infrastructure | Jacksonville contracts with the Medford Water Commission for domestic water and with Rogue Valley Sewer Services for sewage disposal, Because these are regional providers, they have adequate capacity to anticipate growth. |
| Promotions (promos) and Hindrances (hinders) to Population Growth; Other notes | Jacksonville is nearing capacity under existing zoning, and the general sentiment does not favor increasing densities. Much of the available land is on steeper slopes, and therefore more expensive to develop. |
| Highlights or summary from planning documents and studies on influences and anticipation of population and housing growth. | Some decision-makers expect the final result of our recent BLI will be a decision to pursue a UGB expansion. No applications are active at this point. |

# General Survey for Oregon Population Forecast Program

Jurisdiction: City of Medford Date: November 8, 2017

| | |
|---|---|
| Observations about Population Composition (e.g. children, the elderly, racial and ethnic groups) | April 2010 U.S. Census data notes the following percentages:<br>- Under 5 years old – 7.2%<br>- Under 18 years old – 24.1%<br>- 65 years and older – 16.2%<br><br>Despite Medford's (the Rogue Valley's) well-established popularity as a retirement destination, Medford remains relatively younger than other communities in this region. In fact, the Medford School District is struggling to provide adequate physical space in at least 3 of its elementary schools and is assessing the feasibility of constructing a new middle school in the very near future.<br><br>The Rogue Valley and Medford are also becoming more ethnically diverse with a rapidly growing Hispanic community. |
| Observations about Housing | We are currently averaging 28 new SFR permits monthly this year, but the City has already issued 224 building permits for single family detached homes and 114 permits for multi-family dwellings (duplex and larger) within the first 10 months of 2017. Unlike typical years, building and land use permits have continued to be submitted through the end of the calendar year—a period that is historically slower for development activity.<br><br>In conversations with Mahar Homes, the largest single family home developer in the Rogue Valley, their staff have stated that all of their available lots, except one, are pre-sold in their last remaining large subdivision, Summer Field. They will be moving to their property across from Vista Pointe on McAndrews Road, waiting for approval of Medford's UGBA. Demand for multi-family formats is equally strong, and MH has stated that they can't keep up with the demand: most are leased or sold prior to completion. |

| | |
|---|---|
| | The City has also partnered with the Housing Authority of Jackson County and other affordable housing providers to deliver several hundred dwelling units over the last several years. "The Concord", a 50 unit subsidized housing development, was completed in early 2017 and is the first significant residential development in Medford's downtown. "Newbridge Place" is scheduled to start construction in early 2018 and will provide 64 affordable units upon completion—20% of which are reserved for veterans. |
| Planned Housing Dev./Est. Year Completion (for detailed information submissions please use the Housing Development Survey) | Please review the attached sheet labeled "City of Medford Active Subdivision and Multi-Family Projects" |
| Planned future construction of Group Quarters facilities | Bonaventure of Medford will be opening a group quarter facility with 69 independent living suites, 55 assisted living suites and 23 memory care suites. Weatherly Court is assisted living/memory care senior housing being built including 78 units (with 97 beds). Rogue Valley Manor is building a 40 unit memory care facility. |
| Future Employers Locating to the Area | Lighthouse Worldwide Solutions, a high-tech company that manufactures pharmaceutical products, will be moving their headquarters complete with over two dozen executive and management jobs to Medford.<br><br>Stewart Meadows is a very large Planned Unit Development which includes a large flagship Providence Medical office building (nearly constructed), retail, restaurants, offices and multi-family.<br><br>A new phase of the Northgate Center is currently being developed north of Rossanley Dr. (Hwy 238). Offices, retail and restaurants are being proposed.<br><br>The soon to be old Costco building on Hwy 62 will be subdivided to house two new large businesses with additional pads being built for other tenants. |

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| Capacity and condition of infrastructure to accommodate growth.<br><br>Capacity and condition of infrastructure to accommodate growth.<br><br>(con't) | The City currently has numerous sanitary sewer collection system constraints preventing zone changes east of Bear Creek.<br><br>The City is nearing completion of a Sanitary Sewer Collection System Master Plan that addresses how we get the sanitary sewer system to meet the needs for development of the City out to the urban reserves.<br><br>Our Transportation System Plan (TSP) is currently being updated and is showing that we will see transportation capacity constraints around the South Medford Interchange and along the Crater Lake Highway corridor. The TSP will identify strategies to address these areas. Medford's existing street infrastructure is in very good condition. |
| Any Promotions (promos) and Hindrances (hinders) to Population Growth; Other notes | Medford and the Rogue Valley is a desirable place to live. It is understood that older adults are retiring here and families are moving here. Affordability and availability of needed and preferred housing types are significant challenges. Some issues include a low median household income ($41,931), high poverty rate (23.0%), low housing vacancy rates, and high housing prices and rent. |
| Do you have a buildable lands inventory for your area/UGB? If yes, it would be helpful if you could please share it with our center in GIS format. | Yes, we have a BLI in a GIS format and will share it. |
| Highlights or summary from planning documents and studies on influences and anticipation of population and housing growth (including any plans for UGB expansion and the stage in the expansion process) | Population Element adopted in 2007 – estimates 115,869 people by 2029<br><br>Housing Element adopted in 2010; shows a need for 15,050 dwelling units through 2029<br><br>Medford has completed the local land use process to expand its Urban Growth Boundary by 4,046 acres (511 – developed/unbuildable; 1,877 –parkland; 1,658 – developable land). 1,039 of the 1,658 acres are proposed for residential |

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| | development. City is working on the application to submit to the State.<br><br>Regional Housing Study, to be completed by January 2018, is evaluating housing affordability and availability challenges and will recommend policy solutions. |

| General Survey for Oregon Population Forecast Program | |
|---|---|
| Jurisdiction: City of Phoenix | Date: 12/19/2107 |
| Observations about Population Composition (e.g. children, the elderly, racial and ethnic groups) | |
| Observations about Housing | The city hasn't had more than 20 new residential units in the last two years. The city is below density standards set by the Regional plan and will look at some areas of higher density housing in other expansion areas east of I-5 |
| Planned Housing Dev./Est. Year Completion | The city recently received permits for 15 new attached units |
| Future Group Quarters Facilities | |
| Future Employers | |
| Infrastructure | |
| Promotions (promos) and Hindrances (hinders) to Population Growth; Other notes | |

| | |
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| Highlights or summary from planning documents and studies on influences and anticipation of population and housing growth. | The city plans to annex PH-3 area at some point, but there are a number of procedural and logistical issues that need to be resolved beforehand. The process to expand the UGB into the URAs may begin at 2018 at best, though these areas will be incorporated incrementally over time rather than all at once. |

Population Research Center
PORTLAND STATE UNIVERSITY

## Population Forecast Formal Review Process and Appeal Form

The 45-day formal review process begins when the proposed population forecasts are posted on the forecast program website, March 31, 2018, and ends on May 15, 2018. Within this 45-day period, a member of the public or an affected local government may file objections with PRC. IF YOU PLAN TO FILE AN OBJECTION TO A PROPOSED POPULATION FORECAST, PLEASE FIRST SEND AN EMAIL TO LOFTUS2@PDX.EDU TO NOTIFY US OF YOUR INTENT PRIOR TO SUBMITTING YOUR APPEAL FORM AND SUPPORTING INFORMATION. These objections must be filed in writing using the below appeal form and must be submitted via US Mail or electronic mail to PRC by no later than 5:00 pm on May, 15, 2018.

A valid objection must include data or other information to support the objection. Acceptable data and information may include:

1. Corrections or revisions to information that had been previously sent to PRC (e.g., General Demographic Survey, Housing Development Survey).
2. New information that was obtained after submitting a completed demographic or housing development survey during the forecast development period.
3. Evidence that any of the supporting information used to develop the forecasts is erroneous.
4. Other information that PRC determines is relevant.

Please note there are three possible outcomes of the formal review period. First, if PRC does not receive an objection within the 45-day period, the proposed forecast becomes the basis for the final forecast. Second, if PRC receives an objection within the 45-day period, PRC will review the objection along with its supporting information, and make appropriate changes to the proposed forecast, which will be reflected in the final forecast. Third, PRC may overrule the objection as a reserved right, and affirm the proposed forecast, which would then be issued as the final forecast.

Please note that a separate appeal form must be filed for each unique geography (i.e., one completed form per county, UGB, or area outside UGBs).

Date: May 14, 2018

Name: Josh LeBombard

Title/Organization: Department of Land Conservation and Development

Address: 100 E. Main Street, Medford, OR 97501

Email: josh.lebombard@state.or.us

Phone: 541-414-7932

Which geography are you appealing? The county, UGB, or area outside UGB?

City of Phoenix

Do you think the proposed population forecast is too high or too low?

Unsure. See my emailed comments.

For which five-year forecast time interval does your appeal apply? Are you challenging the proposed population forecast for certain five-year time intervals or the forecasts for all 50 years?

First 20 years.

Please provide evidence to support your appeal (See "Acceptable data and information" described above). PRC will not consider supporting information that is not attached to this completed appeal form.

Population Research Center

PO Box 751

Portland OR 97207

(503) 725-3922

Loftus2@pdx.edu

## Population Forecast Challenge

1 message

**LeBombard, Josh** <josh.lebombard@state.or.us> Mon, May 14, 2018 at 2:48 PM
To: "loftus2@pdx.edu" <loftus2@pdx.edu>
Cc: Nicholas Chun <nicchun@pdx.edu>

Deborah,

Please see the attached population forecast challenge form. Nick and I have been in communication about this. My explanation for the challenge is below:

1. The area known as PH-3 should not be counted towards future population growth in the 20 year projection even if it is expected to be brought in by the City within that timeframe. This is due to the fact that the population growth numbers can and will and should be used by cities to expand their UGBs. There are two ways to look at this and both support the previous statement. 1) If existing population from PH-3 is used in the 20 year forecast, theoretically Phoenix could use that additional population to expand its boundary and not take in PH-3. 2) Phoenix could still expand into PH-3 even without the additional population allocated within the 20 year horizon because the UGB process is meant to accommodate a 20 year demand for new housing. PH-3 has limited ability to accommodate new housing needs.

2. Phoenix's population growth has been constrained by land availability for a number of years. The City is currently in the process of updating studies and plans to justify a UGB amendment. If the UGB amendment is successful, then new land will become available for Phoenix. There is a very good likelihood that this will take place and result in higher population growth within the 20 year horizon.

Cheers,

Josh

**Josh LeBombard** | Southern Oregon Regional Representative

Community Services Division

Oregon Dept. of Land Conservation and Development

Southern Oregon Regional Solution Center

c/o Rogue Workforce Partnership

100 E Main Street, Suite A | Medford, OR 97501

Cell: (541) 414-7932

josh.lebombard@state.or.us | www.oregon.gov/LCD

**Population_Forecast_Appeal_and_Review_Form 2018_LeBombard.pdf**

# General Survey for Oregon Population Forecast Program

Jurisdiction: Rogue River Date: 11/8/2017

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|---|---|
| Observations about Population Composition (e.g. children, the elderly, racial and ethnic groups) | We are seeing younger families moving into town but are still a senior community. |
| Observations about Housing | Affordable housing is a big issue and available housing both rental and for sale is almost nonexistent. |
| Planned Housing Dev./Est. Year Completion (for detailed information submissions please use the Housing Development Survey) | At this time there are no plans for any large developments just infill of single family houses |
| Planned future construction of Group Quarters facilities | None |
| Future Employers Locating to the Area | There are two commercial developments on the horizon both just relocating and building new facilities, no increase in employment is expected. |
| Capacity and condition of infrastructure to accommodate growth. | All infrastructures are adequate for the infill that is expected, but if annexation from the UGB happens that would need to be reevaluated. |
| Any Promotions (promos) and Hindrances (hinders) to Population Growth; Other notes | The biggest hindrance to growth and development in the city are traffic related. The geographic constraints make solving this problem almost impossible. We are currently updating our TSP. |
| Do you have a buildable lands inventory for your area/UGB? If yes, it would be helpful if you could please share it with our center in GIS format. | The city does not have a buildable lands inventory for residential but did one about 15 years ago for commercial. |

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| Highlights or summary from planning documents and studies on influences and anticipation of population and housing growth (including any plans for UGB expansion and the stage in the expansion process) | The city has grown at about a 1% rate for the last 15 years and before that was in moratoriums for about 6 years and I don't see any change in this rate unless there is UGB annexation. |

# General Survey for Oregon Population Forecast Program

Jurisdiction: Shady Cove Date: 1/10/2018

| | |
|---|---|
| Observations about Population Composition (e.g. children, the elderly, racial and ethnic groups) | Contrast between very wealthy (high income housing) and strong inventory of Manufactured dwelling in mobile home parks |
| Observations about Housing | Occupancy rates stable;<br>Slow and steady construction on vacant lots |
| Planned Housing Dev./Est. Year Completion | |
| Future Group Quarters Facilities | |
| Future Employers | |
| Infrastructure | A private water company is constructing municipal-level water lines that will increase potential for urban density residential development in newly served areas. |
| Promotions (promos) and Hindrances (hinders) to Population Growth; Other notes | **Promos:** Has enough land in and outside city for residential development, enough to accommodate at least 3,500 persons.<br>**Hinders:** Properties along primary physical attraction (Rogue River) are occupied; Distance from medical services; |
| Highlights or summary from planning documents and studies on influences and anticipation of population and housing growth. | There haven't been any changes from the information the city submitted in 2015, with the exception of the infrastructure section.<br><br>Population growth is slightly less than projected for the period beginning in 1990. Current estimates are around 2,920 in 2014; the estimate for 2015 is 3,178. |

# Appendix B: Specific Assumptions

**Ashland**

We assume total fertility rates will remain stable throughout the forecast period. We assume forecasted trends in survival rates to be the same as those for the county as a whole; these rates are expected to increase slightly for the 65+ population over the 25 year horizon. Age specific net migration rates are generally in line with county patterns, though there is greater movement of college-age and graduate cohorts within the sub-area.

**Butte Falls**

We assume the 5-year average annual housing unit growth rate to remain stable throughout the forecast period. We assume the occupancy rate to decline to 85.3% and persons per household (PPH) to be steady at 2.55 for the 25-year horizon. There is no group quarters population in this sub-area.

**Central Point**

We assume total fertility rates will follow a historical trend (observed from the 2000 to 2010 period) and gradually decline over the forecast period. We assume forecasted trends in survival rates to be the same as those for the county as a whole; these rates are expected to increase slightly for the 65+ population over the 25 year horizon. Age specific net migration rates are generally in line with county patterns.

**Eagle Point**

We assume total fertility rates will follow a historical trend (observed from the 2000 to 2010 period) and gradually decline over the forecast period. We assume forecasted trends in survival rates to be the same as those for the county as a whole; these rates are expected to increase slightly for the 65+ population over the 25 year horizon. Age specific net migration rates are generally in line with county patterns.

**Gold Hill**

We assume the 5-year average annual housing unit growth rate to taper throughout the forecast period. We assume the occupancy rate and persons per household (PPH) to be steady at 92.3% percent and 2.39 for the 25-year horizon, respectively. There is no group quarters population for this sub-area.

**Jacksonville**

We assume the 5-year average annual housing unit growth rate to taper throughout the forecast period. We assume the occupancy rate to be steady at 89% and persons per household (PPH) to decline to 1.96 for the 25-year horizon. We assume the group quarters population to remain at 109.

**Medford**

We assume total fertility rates will follow a historical trend (observed from the 2000 to 2010 period) and gradually decline over the forecast period. We assume forecasted trends in survival rates to be the same as those for the county as a whole; these rates are expected to increase slightly for the 65+ population over the 25 year horizon. Age specific net migration rates deviate from county patterns; we expect the net in-migration from all age groups.

**Phoenix**

We assume slow 5-year average annual housing unit growth rates to pick up after 2025 and taper thereafter throughout the forecast period. We assume the occupancy rate and persons per household (PPH) to be steady at 90.2% percent and 2.06 for the 25-year horizon, respectively. There is no group quarters population in this sub-area.

**Rogue River**

We assume the 5-year average annual housing unit growth rate to taper throughout the forecast period. We assume the occupancy rate and persons per household (PPH) to be steady at 93.2% percent and 2.27 for the 25-year horizon, respectively. We assume the group quarters population to remain at 23.

**Shady Cove**

We assume slow 5-year average annual housing unit growth rates to pick up after 2025 and taper thereafter throughout the forecast period. We assume the occupancy rate and persons per household (PPH) to be steady at 88.3% percent and 2.25 for the 25-year horizon, respectively. We assume the group quarters population to remain at 2.

**Talent**

We assume the 5-year average annual housing unit growth rate to taper throughout the forecast period. We assume the occupancy rate and persons per household (PPH) to be steady at 93.4% percent and 2.29 for the 25-year horizon, respectively. We assume the group quarters population to remain at 16.

**Outside UGBs**

We assume total fertility rates will follow a historical trend (observed from the 2000 to 2010 period) and gradually decline over the forecast period. We assume forecasted trends in survival rates to be the same as those for the county as a whole; these rates are expected to increase slightly for the 65+ population over the 25 year horizon. Age specific net migration rates are generally in line with county patterns, though we expect a net out-migration of the population 70+ to continue into the future.

# Appendix C: Detailed Population Forecast Results

**Figure 21. Jackson County—Population by Five-Year Age Group**

| Population Forecasts by Age Group / Year | 2018 | 2020 | 2025 | 2030 | 2035 | 2040 | 2043 |
|---|---|---|---|---|---|---|---|
| 00-04 | 12,109 | 11,925 | 11,973 | 12,246 | 12,579 | 13,010 | 13,252 |
| 05-09 | 12,483 | 13,265 | 12,934 | 13,141 | 13,527 | 13,907 | 14,181 |
| 10-14 | 12,604 | 12,526 | 14,369 | 14,049 | 14,235 | 14,666 | 14,901 |
| 15-19 | 12,959 | 13,162 | 12,636 | 14,681 | 14,452 | 14,658 | 14,911 |
| 20-24 | 12,064 | 12,200 | 12,209 | 11,885 | 13,911 | 13,708 | 13,812 |
| 25-29 | 11,824 | 11,719 | 11,978 | 11,901 | 11,608 | 13,601 | 13,470 |
| 30-34 | 12,906 | 13,374 | 13,012 | 13,334 | 13,330 | 12,725 | 13,984 |
| 35-39 | 12,556 | 12,744 | 14,118 | 13,902 | 14,338 | 14,214 | 13,813 |
| 40-44 | 13,176 | 13,655 | 14,097 | 15,798 | 15,516 | 16,017 | 15,922 |
| 45-49 | 13,495 | 13,816 | 15,026 | 15,692 | 17,538 | 17,240 | 17,559 |
| 50-54 | 13,927 | 13,908 | 14,668 | 16,141 | 16,809 | 18,803 | 18,597 |
| 55-59 | 14,803 | 14,584 | 14,451 | 15,424 | 17,080 | 17,804 | 19,028 |
| 60-64 | 15,689 | 15,891 | 14,951 | 14,994 | 15,817 | 17,525 | 17,956 |
| 65-69 | 14,845 | 15,654 | 15,936 | 15,040 | 14,905 | 15,738 | 16,721 |
| 70-74 | 12,172 | 13,118 | 14,634 | 15,110 | 14,364 | 14,246 | 14,707 |
| 75-79 | 8,978 | 9,802 | 11,793 | 13,377 | 13,927 | 13,245 | 13,164 |
| 80-84 | 6,318 | 6,897 | 8,348 | 10,230 | 11,391 | 11,871 | 11,504 |
| 85+ | 6,362 | 6,738 | 7,934 | 9,666 | 11,931 | 13,933 | 14,743 |
| **Total** | **219,270** | **224,980** | **235,066** | **246,611** | **257,256** | **266,910** | **272,226** |

**Figure 22. Jackson County's Sub-Areas—Total Population**

| Area / Year | 2018 | 2020 | 2025 | 2030 | 2035 | 2040 | 2045 | 2050 | 2055 | 2060 | 2065 | 2068 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Jackson County | 219,270 | 224,980 | 235,066 | 246,611 | 257,256 | 266,910 | 275,829 | 285,046 | 294,571 | 304,414 | 314,586 | 320,852 |
| Ashland UGB | 21,501 | 21,788 | 22,539 | 23,196 | 23,544 | 23,630 | 23,617 | 23,710 | 23,595 | 23,767 | 24,085 | 24,177 |
| Butte Falls UGB | 419 | 412 | 420 | 427 | 434 | 440 | 446 | 447 | 443 | 446 | 451 | 452 |
| Central Point UGB | 19,101 | 19,714 | 21,035 | 22,920 | 24,815 | 26,707 | 28,553 | 30,520 | 32,859 | 34,855 | 36,713 | 38,008 |
| Eagle Point UGB | 9,188 | 9,515 | 10,034 | 11,159 | 12,298 | 13,444 | 14,575 | 15,742 | 17,153 | 18,329 | 19,407 | 20,172 |
| Gold Hill UGB | 1,234 | 1,238 | 1,274 | 1,307 | 1,338 | 1,366 | 1,392 | 1,408 | 1,416 | 1,437 | 1,465 | 1,477 |
| Jacksonville UGB | 2,985 | 3,056 | 3,199 | 3,483 | 3,767 | 4,044 | 4,311 | 4,588 | 4,914 | 5,196 | 5,460 | 5,643 |
| Medford UGB | 82,566 | 84,966 | 88,985 | 94,210 | 99,640 | 105,225 | 110,950 | 116,134 | 121,936 | 127,319 | 132,583 | 136,046 |
| Phoenix UGB | 4,861 | 4,896 | 5,051 | 5,331 | 5,591 | 5,826 | 6,063 | 6,280 | 6,510 | 6,741 | 6,976 | 7,124 |
| Rogue River UGB | 2,846 | 2,891 | 2,958 | 3,114 | 3,258 | 3,389 | 3,521 | 3,635 | 3,751 | 3,872 | 3,999 | 4,076 |
| Shady Cove UGB | 3,288 | 3,338 | 3,463 | 3,749 | 3,995 | 4,213 | 4,422 | 4,652 | 4,915 | 5,152 | 5,380 | 5,533 |
| Talent UGB | 6,416 | 6,489 | 6,796 | 7,314 | 7,743 | 8,142 | 8,551 | 8,978 | 9,463 | 9,904 | 10,332 | 10,617 |
| Outside UGB Area | 64,865 | 66,676 | 69,314 | 70,402 | 70,835 | 70,483 | 69,428 | 68,952 | 67,615 | 67,396 | 67,736 | 67,527 |