Coordinated Population Forecast

2015

Through

2065

Jackson County

Urban Growth Boundaries (UGB) & Area Outside UGBs

Population Research Center
PORTLAND STATE UNIVERSITY

Coordinated Population Forecast for Jackson County, its Urban Growth Boundaries (UGB), and Area Outside UGBs 2015-2065

Prepared by

Population Research Center

College of Urban and Public Affairs

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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 (i.e., 2015-2065). These tables are also located in *Appendix C* of this report.

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Executive Summary

Historical

Different growth patterns occur in different parts of the county and these local trends within the UGBs and the area outside UGBs collectively influence population growth rates for the county as a whole.

Jackson County's total population has grown steadily since 2000, with an average annual growth rate of above one percent between 2000 and 2010 (Figure 1); however some of its sub-areas experienced more rapid population growth during the 2000s. Eagle Point and Central Point UGBs posted the highest average annual growth rates at 5.6 and 2.9 percent, respectively, during the 2000 to 2010 period.

Jackson County's positive population growth in the 2000s was the result of substantial net in-migration and natural increase. Meanwhile 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 choosing to have fewer children and have them at older ages has led to slower growth in births. The more rapid growth in deaths relative to that of births caused natural increase—the difference between births and deaths—to decline to almost nothing by 2014. While net in-migration outweighed declining natural increase during the early and middle years of the last decade, the gap between these two numbers shrank during the later years—slowing population growth by 2010. Since 2010 net in-migration has driven rising population growth rates, while natural increase continues to shrink.

Forecast

Total population in Jackson County as a whole as well as within its sub-areas will likely grow at a slightly faster pace in the first 20 years of the forecast period (2015 to 2035), relative to the last 30 years (Figure 1). The tapering of growth rates is largely driven by an aging population—a demographic trend which is expected to lead to natural decrease (more deaths than births). As natural decrease occurs, population growth will become increasingly reliant on net in-migration.

Even so, Jackson County's total population is forecast to increase by nearly 44,600 over the next 20 years (2015-2035) and by nearly 95,600 over the entire 50-year forecast period (2015-2065). Sub-areas that showed strong population growth in the 2000s are expected to experience similar rates of population growth during the forecast period.

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

	Historical			Forecast				
	2000	2010	AAGR (2000-2010)	2015	2035	2065	AAGR (2015-2035)	AAGR (2035-2065)
Jackson County	*181,269*	*203,206*	*1.1%*	*211,275*	*255,840*	*306,858*	*1.0%*	*0.6%*
Ashland[1]	20,023	20,626	0.3%	20,905	23,183	24,138	0.5%	0.1%
Butte Falls	440	423	-0.4%	421	437	447	0.2%	0.1%
Central Point	13,310	17,736	2.9%	18,329	22,680	27,485	1.1%	0.6%
Eagle Point	4,952	8,508	5.6%	9,657	14,839	18,669	2.2%	0.8%
Gold Hill	1,181	1,228	0.4%	1,267	1,496	2,018	0.8%	1.0%
Jacksonville	2,256	2,785	2.1%	2,927	4,316	6,687	2.0%	1.5%
Medford	67,865	76,581	1.2%	80,024	99,835	124,582	1.1%	0.7%
Phoenix	4,379	4,774	0.9%	4,955	6,883	9,775	1.7%	1.2%
Rogue River	2,544	2,714	0.6%	2,838	3,705	5,545	1.3%	1.4%
Shady Cove	2,528	3,050	1.9%	3,168	4,343	6,105	1.6%	1.1%
Talent	5,683	6,123	0.7%	6,411	9,020	14,290	1.7%	1.5%
Outside UGBs	56,108	58,658	0.4%	60,373	65,104	67,119	0.4%	0.1%

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

[1] *For simplicity each UGB is referred to by its primary city's name.*

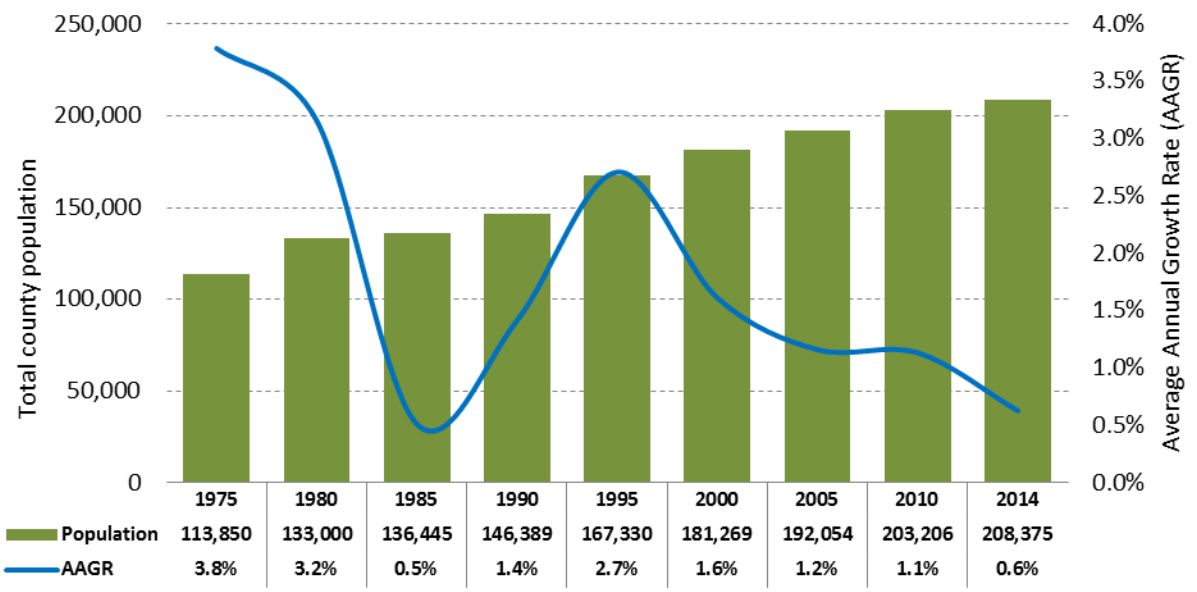
Historical Trends

Different growth patterns occur in different parts of the county. Each of Jackson County's sub-areas was examined for any significant demographic characteristics or changes in population or housing growth that might influence their individual forecasts. Factors that were analyzed include age composition of the population, ethnicity and race, births, deaths, migration, and number of *housing units* as well as the *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, in general, population growth rates for the county are collectively influenced by local trends within its sub-areas.

Population

Jackson County's total population grew by about 83 percent between 1975 and 2014—from roughly 114,000 in 1975 to more than 208,000 in 2014 (Figure 2). During this approximately 40-year period, the county realized the highest growth rates during the 1970s, which coincided with a period of relative economic prosperity. During the early 1980s, challenging economic conditions, both nationally and within the county, yielded a sharp decline in population growth. Since 1985, the county has experienced steady population growth averaging just over one percent per year. During the 2000s, population growth remained positive and averaged more than one percent per year, in spite of the Great Recession.

Figure 2. Jackson County—Total Population by Five-year Intervals (1975-2010 and 2010-2014)



	1975	1980	1985	1990	1995	2000	2005	2010	2014
Population	113,850	133,000	136,445	146,389	167,330	181,269	192,054	203,206	208,375
AAGR	3.8%	3.2%	0.5%	1.4%	2.7%	1.6%	1.2%	1.1%	0.6%

Sources: U.S. Census Bureau, 1980, 1990, 2000, and 2010 Censuses; Population Research Center (PRC), July 1st Annual Estimates 1975, 1985, 1995, 2005, and 2014.

Jackson County's population change is the sum of its parts, in the sense that countywide population change is the combined population growth or decline within each UGB and the area outside UGBs. During the 2000s, Jackson County's average annual population growth rate stood at 1.1 percent, but the growth rate varied to a large degree in sub-areas across the county. Some UGBs, such as Central Point, Eagle Point, Jacksonville, and Shady Cove, realized average annual growth rates that were well above

the countywide rate of one percent (Figure 3). At the same time the remaining UGBs recorded growth rates near or below one percent, or even population decline as was the case for Butte Falls. Most UGBs increased as a share of total county population, but some decreased. The most notable decrease was Ashland. The area outside UGBs experienced an average annual growth rate below that of the county as a whole and declined as a share of total county population between 2000 and 2010.

Figure 3. Jackson County and Sub-Areas—Total Population and Average Annual Growth Rate (AAGR) (2000 to 2010)

	2000	2010	AAGR (2000-2010)	Share of County 2000	Share of County 2010
Jackson County	*181,269*	*203,206*	*1.1%*	*100.0%*	*100.0%*
Ashland[1]	20,023	20,626	0.3%	11.0%	10.2%
Butte Falls	440	423	-0.4%	0.2%	0.2%
Central Point	13,310	17,736	2.9%	7.3%	8.7%
Eagle Point	4,952	8,508	5.6%	2.7%	4.2%
Gold Hill	1,181	1,228	0.4%	0.7%	0.6%
Jacksonville	2,256	2,785	2.1%	1.2%	1.4%
Medford	67,865	76,581	1.2%	37.4%	37.7%
Phoenix	4,379	4,774	0.9%	2.4%	2.3%
Rogue River	2,544	2,714	0.6%	1.4%	1.3%
Shady Cove	2,528	3,050	1.9%	1.4%	1.5%
Talent	5,683	6,123	0.7%	3.1%	3.0%
Outside UGBs	56,108	58,658	0.4%	31.0%	28.9%

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

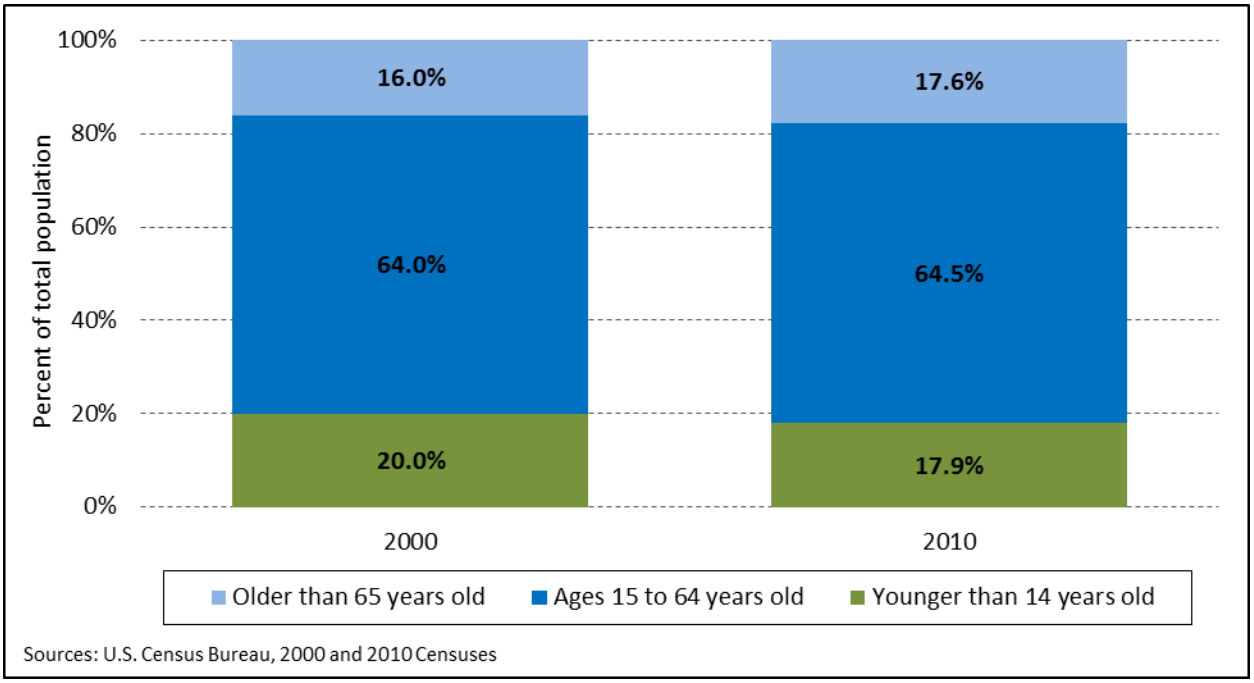
[1] *For simplicity each UGB is referred to by its primary city's name.*

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 decline in births. This demographic trend underlies some of the population change that has occurred in recent years. From 2000 to 2010 the proportion of county population 65 or older grew from about 16 percent to approximately 18 percent (Figure 4).[1] Further underscoring the countywide trend in aging, the median age went from about 39 in 2000 to 42 in 2010.[2]

[1] The population over the age of 65 calculated as a proportion of the working age population is known as the elderly dependency ratio. In general this dependency ratio has been growing more rapidly in recent years.
[2] Median age is sourced from the U.S. Census Bureau's 2000 and 2010 Censuses

Figure 4. 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 population within Curry County increased substantially from 2000 to 2010 (Figure 5), while the White, non-Hispanic population increased by a smaller amount (in relative terms) 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 have tended to be higher than among White, non-Hispanic women. Second, Hispanic and minority households tend to be larger relative to White, non-Hispanic households.

Figure 5. 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

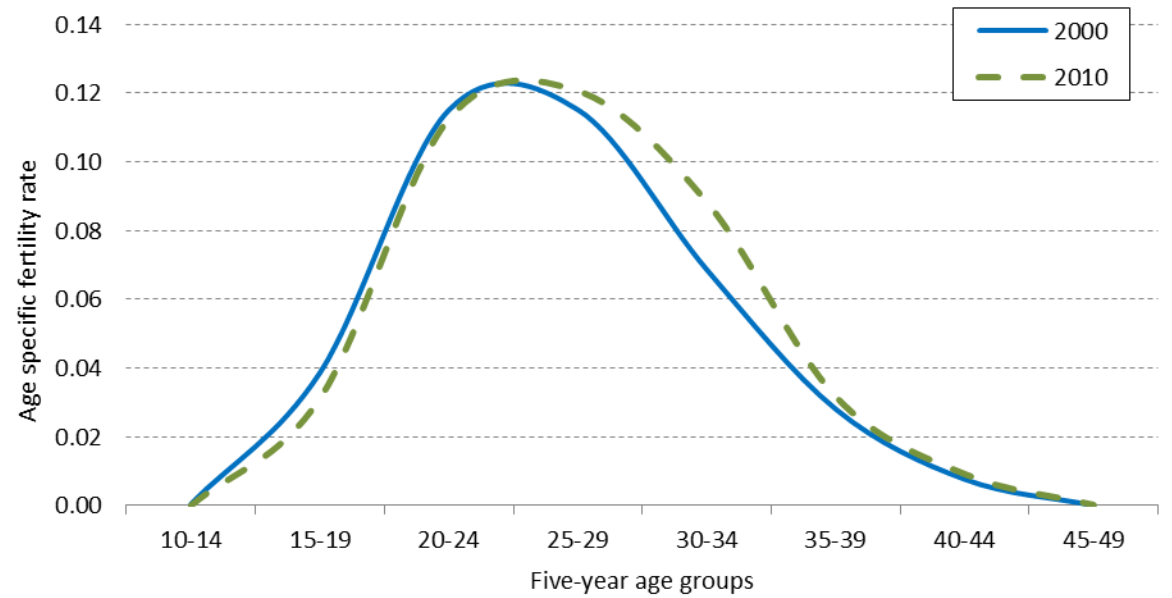
Historical fertility rates for Jackson County don't mirror the decline in total fertility observed for Oregon overall (Figure 6). Furthermore fertility for younger women in Jackson County has remained at a much higher level than for younger women statewide (Figure 7 and Figure 8). As Figure 7 demonstrates, fertility rates for younger women in Jackson County are lower in 2000 compared to 2010, and women are choosing to have children at older ages. While the decrease in fertility among younger women largely mirrors statewide changes, county fertility changes are distinct from those of the state in two ways. First, while fertility among younger women did decrease within the county, the drop was less pronounced than for younger women statewide. Second, the increase in total fertility in Jackson County during the 2000s runs contrary to the statewide decline during this same period. At the same time Jackson County's total fertility remains below *replacement fertility*.

Figure 6. Jackson County and Oregon—Total Fertility Rates (2000 and 2010)

	2000	2010
Jackson County	1.87	1.97
Oregon	1.98	1.79

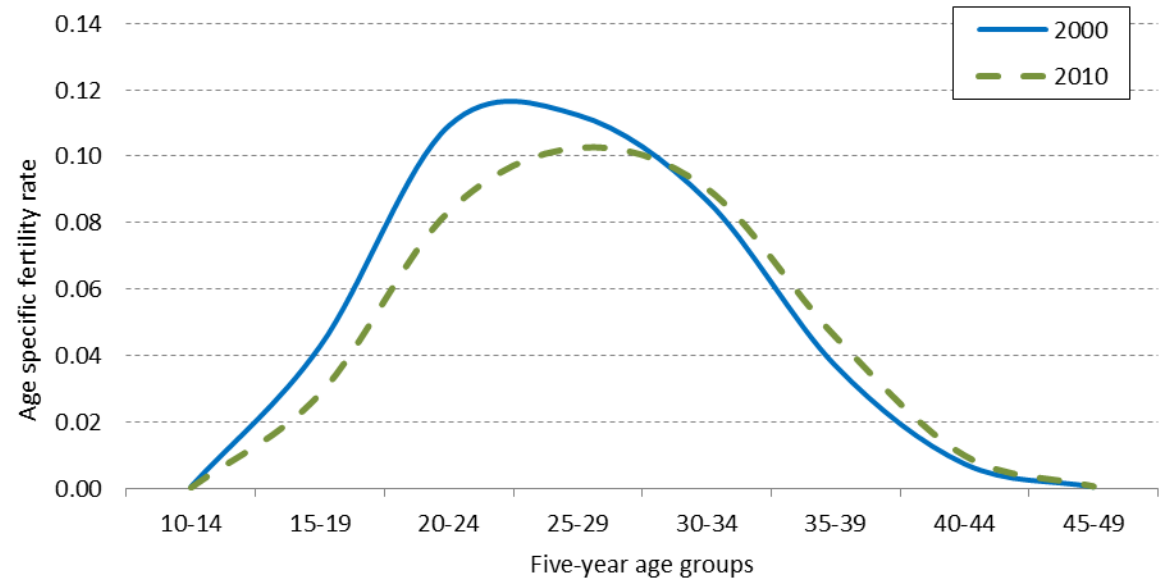
Sources: U.S. Census Bureau, 2000 and 2010 Censuses. Oregon Health Authority, Center for Health Statistics. Calculations by Population Research

Figure 7. Jackson County—Age Specific Fertility Rate (2000 and 2010)



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

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



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

Figure 9 shows the number of births by the area in which the mother resides. Please note that the number of births fluctuates from year to year. For example a sub-area with an increase in births

between two years could easily show a decrease for a different time period; however for the 10-year period from 2000 to 2010 the county as a whole saw an increase in births (Figure 9).

Figure 9. Jackson County and Sub-Areas—Total Births (2000 and 2010)

	2000	2010	Absolute Change	Relative Change	Share of County 2000	Share of County 2010
Jackson County	*2,050*	*2,341*	*291*	*14.2%*	*100.0%*	*100.0%*
Ashland[1]	162	123	-39	-24.0%	7.9%	5.3%
Central Point	180	270	90	50.1%	8.8%	11.5%
Eagle Point	93	103	10	10.8%	4.5%	4.4%
Medford	920	1,111	191	20.8%	44.9%	47.5%
Smaller UGBs[2]	234	230	-4	-1.7%	11.4%	9.8%
Outside UGBs	462	504	42	9.1%	22.5%	21.5%

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

[1] For simplicity each UGB is referred to by its primary city's name.

[2] Smaller UGBs are those with populations less than 8,000 in forecast launch year.

Deaths

While the population in the county as a whole is aging, more people are living longer. For Jackson County in 2000, life expectancy for males was 76 years and for females was 80 years. By 2010, life expectancy had increased to 77 for males and 82 for females. 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 of population change. Even so, the total number of countywide deaths increased (Figure 10).

Figure 10. Jackson County and Sub-Areas—Total Deaths (2000 and 2010)

	2000	2010	Absolute Change	Relative Change	Share of County 2000	Share of County 2010
Jackson County	*1,877*	*2,172*	*295*	*15.7%*	*100.0%*	*100.0%*
Ashland[1]	164	190	26	15.8%	8.7%	8.8%
Central Point	114	135	21	18.4%	6.1%	6.2%
Medford	796	904	108	13.6%	42.4%	41.6%
All other areas[2]	803	943	140	17.4%	42.8%	43.4%

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

[1] For simplicity each UGB is referred to by its primary city's name.

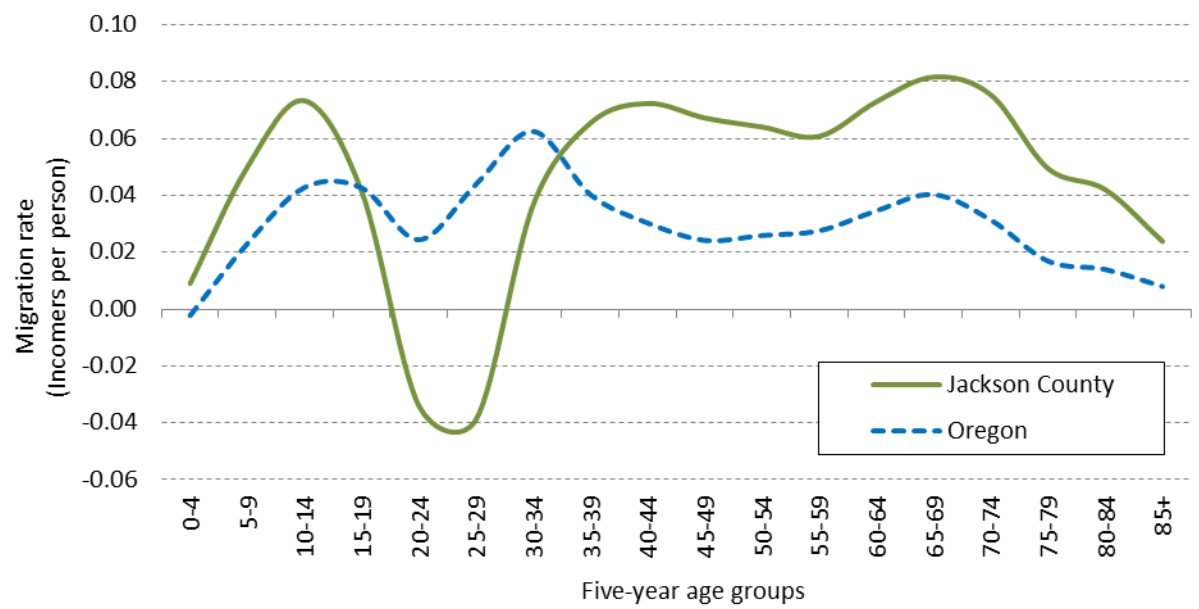
[2] All other areas includes some larger UGBs (those with populations greater than 8,000), all smaller UGBs (those with populations less than 8,000), and the area outside UGBs. Detailed, point level death data were unavailable for 2000, thus PRC was unable to assign deaths to some UGBs.

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 Oregon as a whole. The migration rate is shown as the number of net migrants per person by age group.

From 2000 to 2010, younger individuals (ages with the highest mobility levels) moved out of the county in search of employment and education opportunities, as well as military service. At the same time the county attracted a large number of middle-aged to older migrants who likely moved into the county for work-related reasons, to retire, or to be closer family members.

Figure 11. Jackson County and Oregon—Five-year Migration Rates (2000-2010)

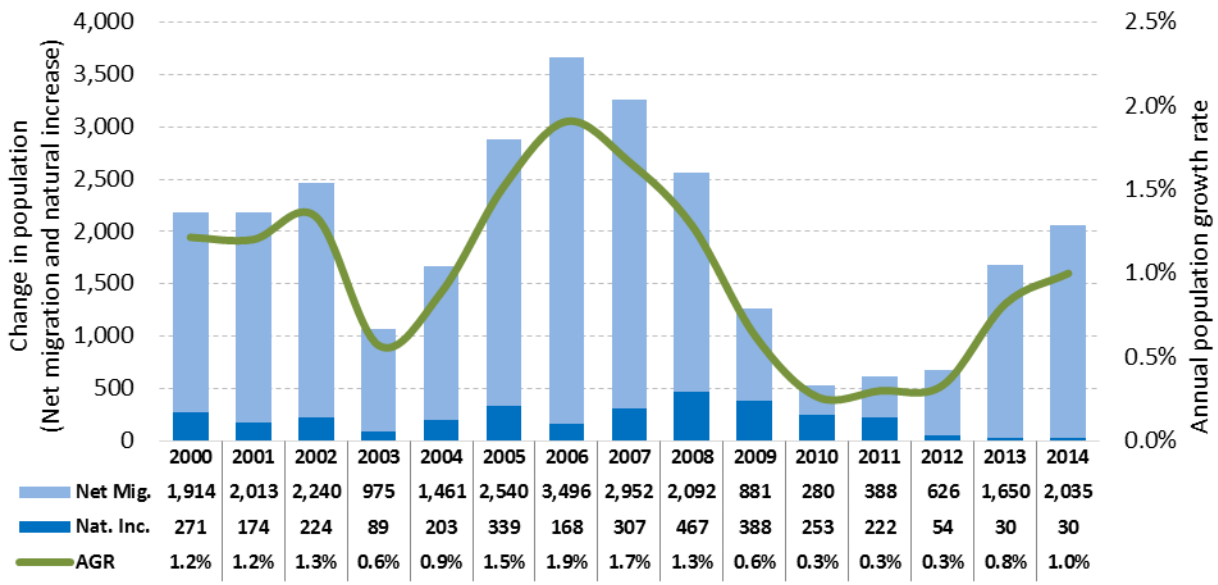


Sources: U.S. Census Bureau, 2000 and 2010 Censuses. Calculated by Population Research Center (PRC).

Historical Trends in Components of Population Change

In summary, Jackson County's positive population growth in the 2000s was the result of substantial net in-migration and natural increase (Figure 12). Meanwhile 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 choosing to have fewer children and have them at older ages has led to slower growth in births. The more rapid growth in deaths relative to that of births caused natural increase—the difference between births and deaths—to decline to almost nothing by 2014. While net in-migration outweighed declining natural increase during the early and middle years of the last decade, the gap between these two numbers shrank during the later years—slowing population growth by 2010. Since 2010 net in-migration has driven rising population growth rates, while natural increase continues to shrink.

Figure 12. Jackson County—Components of Population Change (2000-2014)



	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Net Mig.	1,914	2,013	2,240	975	1,461	2,540	3,496	2,952	2,092	881	280	388	626	1,650	2,035
Nat. Inc.	271	174	224	89	203	339	168	307	467	388	253	222	54	30	30
AGR	1.2%	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%

Sources: Population Research Center, July 1st Annual Estimates 2000-2014. 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 national recession in 2007. Over the entire 2000 to 2010 period, the total number of housing units increased by 20 percent countywide; this equaled more than 15,000 new housing units (Figure 13). Medford captured the largest share of growth in total housing units, with the area outside UGBs, Central Point, Eagle Point, and Ashland also seeing large shares of the countywide housing growth. In terms of relative housing growth Eagle Point grew the most during the 2000s; its total housing units increased nearly 93 percent (1,746 housing units) by 2010.

The rates of increase in the number of total housing units in the county, UGBs, and area outside UGBs are similar to the growth rates of their corresponding populations. The growth rates for housing may slightly differ than the rates for population because the numbers of total housing units are smaller than the numbers of persons, or the UGB has experienced changes in the average number of persons per household or in occupancy rates. However, the pattern of population and housing change in the county is 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
Jackson County	*75,737*	*90,937*	*1.8%*	*100.0%*	*100.0%*
Ashland[1]	9,289	10,735	1.5%	12.3%	11.8%
Butte Falls	170	188	1.0%	0.2%	0.2%
Central Point	5,072	7,202	3.6%	6.7%	7.9%
Eagle Point	1,882	3,628	6.8%	2.5%	4.0%
Gold Hill	523	557	0.6%	0.7%	0.6%
Jacksonville	1,116	1,548	3.3%	1.5%	1.7%
Medford	28,215	33,166	1.6%	37.3%	36.5%
Phoenix	2,017	2,251	1.1%	2.7%	2.5%
Rogue River	1,309	1,462	1.1%	1.7%	1.6%
Shady Cove	1,200	1,533	2.5%	1.6%	1.7%
Talent	2,453	2,853	1.5%	3.2%	3.1%
Outside UGBs	22,491	25,814	1.4%	29.7%	28.4%

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

[1] *For simplicity each UGB is referred to by its primary city's name.*

Occupancy rates tend to fluctuate more than PPH. This is particularly true in smaller UGB areas where fewer housing units allow for larger changes—in relative terms—in occupancy rates. From 2000 to 2010 the occupancy rate in Jackson County declined slightly; this was most likely due to slack in demand for housing as individuals experienced the effects of the Great Recession. A slight drop in occupancy rates was mostly uniform across all sub-areas.

Average household size, or PPH, in Jackson County was 2.4 in 2010, down from 2.5 in 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 sub-areas, with all of them falling between 2.0 and 2.6 persons per household. In 2010 Central Point and Eagle Point had the highest PPH of 2.6. Ashland and Jacksonville had the lowest PPH of 2.0.

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[1]	2.2	2.0	-5.4%	94.2%	90.0%	-4.1%
Butte Falls	2.8	2.5	-7.3%	94.1%	88.3%	-5.8%
Central Point	2.7	2.6	-2.8%	96.8%	93.8%	-3.0%
Eagle Point	2.8	2.6	-6.9%	93.5%	89.5%	-4.0%
Gold Hill	2.5	2.4	-4.9%	89.9%	92.3%	2.4%
Jacksonville	2.1	2.0	-5.9%	93.6%	89.0%	-4.7%
Medford	2.5	2.4	-1.4%	95.4%	92.8%	-2.6%
Phoenix	2.3	2.3	-1.2%	94.5%	93.2%	-1.4%
Rogue River	2.1	2.1	-1.2%	92.7%	90.2%	-2.5%
Shady Cove	2.3	2.3	-4.0%	89.8%	88.3%	-1.5%
Talent	2.4	2.3	-4.5%	96.1%	93.4%	-2.7%
Outside UGBs	2.6	2.5	-5.0%	93.3%	89.7%	-3.6%

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

[1] *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 the most likely scenarios for population change. Past trends also explain the dynamics of population growth specific to local areas. Relating recent and historical population change to events that influence population change serves as a gauge for what might realistically occur in a given area over the long-term.

Assumptions about fertility, mortality, and migration were developed for Jackson County's population forecast as well as the forecasts for larger sub-areas.[3] The assumptions are derived from observations based on life course events, as well as trends unique to Jackson County and its larger sub-areas. Population change for smaller sub-areas is determined by the change in the number of total housing units and PPH. Assumptions around housing unit growth as well as occupancy rates are derived from observations of historical building patterns and current plans for future housing development. In addition assumptions for PPH are based on observed historical patterns of household demographics—for example the average age of householder. The forecast period is 2015-2065.

Assumptions for the County and Larger Sub-Areas

During the forecast period, as the population in Jackson County is expected to continue to age, fertility rates will begin to decline in the near term and continue on this path throughout the remainder of the forecast period. Total fertility in Jackson County is forecast to decrease from 1.9 children per woman in 2015 to 1.8 children per woman by 2065. Similar patterns of declining total fertility are expected within the county's larger sub-areas.

Changes in mortality and life expectancy are more stable compared to fertility and migration. One influential factor affecting mortality and life expectancy is advances in medical technology. The county and larger sub-areas are projected to follow the statewide trend of increasing life expectancy throughout the forecast period—progressing from a life expectancy of 79 years in 2010 to 87 in 2060. However in spite of increasing life expectancy and the corresponding increase in survival rates, Jackson County's aging population and large population cohort reaching a later stage of life will increase the overall number of deaths throughout the forecast period. Larger sub-areas within the county will experience a similar increase in deaths as their population ages.

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. Net migration rates will change in line with historical trends unique to Jackson County. Net out-migration of younger persons and net in-migration of older

[3] County sub-areas with populations greater than 8,000 in forecast launch year were forecast using the *cohort-component method*. County sub-areas with populations less than 8,000 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.

individuals will persist throughout the forecast period. Countywide average annual net migration is expected to increase from 1,505 net in-migrants in 2015 to 2,855 net in-migrants in 2035. Over the last 30 years of the forecast period average annual net migration is expected to be more steady, increasing to 3,479 net in-migrants by 2065. With natural increase diminishing in its potential to contribute to population growth, net in-migration will become an increasingly important component of population growth.

Assumptions for Smaller Sub-Areas

Rates of population growth for the smaller UGBs are assumed to be 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 are assumed to stay relatively stable over the forecast period, while PPH is expected to decline slightly. Smaller household size is associated with an aging population in Jackson County and its sub-areas.

In addition, for sub-areas experiencing population growth, we assume a higher growth rate in the near term, with growth stabilizing over the remainder of the forecast period. If planned housing units were reported in the surveys, then we account for them being constructed over the next 5-15 years. Finally, for county sub-areas where population growth has been flat or declined, and there is no planned housing construction, we hold population growth mostly stable with little to no change.

Supporting Information and Specific Assumptions

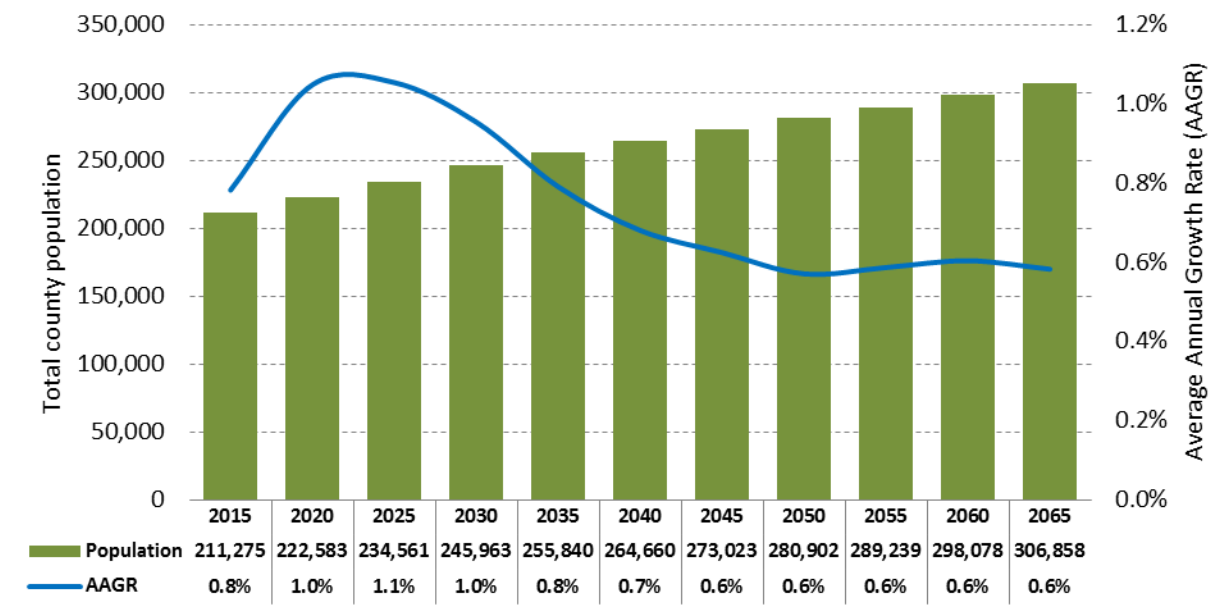
Assumptions used for developing population forecasts are partially derived from surveys and other information provided by local planners and agencies. See *Appendix A* for a summary of all submitted surveys and other information that was directly considered in developing the sub-area forecasts. Also, see *Appendix B* for specific assumptions used in each sub-area forecast.

Forecast Trends

Under the most-likely population growth scenario in 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 2025 and then slowly decline throughout the forecast period. Forecasting tapered population growth is largely driven by an aging population, which is expected to contribute to an increase in deaths, as well as a decrease in births—fewer women within child-bearing years. The aging population is expected to in turn contribute to natural decrease over the forecast period. Net migration is expected to grow steadily throughout the forecast period, but this growth will likely not fully offset the decline in natural increase. The combination of these factors is expected to result in a slowly declining population growth rate as time progresses through the forecast period.

Jackson County's total population is forecast to grow by nearly 95,600 persons (45 percent) from 2015 to 2065, which translates into a total countywide population of 306,858 in 2065 (Figure 15). The population is forecast to grow at the highest rate—approximately one percent per year—in the near term (2015-2025). This anticipated population growth in the near term is based on two core assumptions: 1) Jackson County's economy will continue to strengthen in the next five years, and; 2) an increasing number of Baby Boomers will retire to the county. The single largest component of growth in this initial period is net in-migration. Nearly 24,000 net in-migrants are forecast for the 2015 to 2025 period.

Figure 15. Jackson County—Total Forecast Population by Five-year Intervals (2015-2065)



	2015	2020	2025	2030	2035	2040	2045	2050	2055	2060	2065
Population	211,275	222,583	234,561	245,963	255,840	264,660	273,023	280,902	289,239	298,078	306,858
AAGR	0.8%	1.0%	1.1%	1.0%	0.8%	0.7%	0.6%	0.6%	0.6%	0.6%	0.6%

Source: Forecast by Population Research Center (PRC)

Jackson County's larger UGBs are forecast to experience a combined population growth of more than 31,600 from 2015 to 2035 and more than 34,300 from 2035 to 2065 (Figure 16). Eagle Point is expected to grow at the fastest average annual rate at more than two percent per year during the first 20 years of

the forecast period. Over this same time period Central Point and Medford are forecast to grow at average annual rates greater than one percent, while Ashland is expected to grow at a relatively slower pace of about one half percent per year. Average annual growth rates are expected to slow during the final 30 years of the forecast period. The majority of larger UGBs are expected to grow as a share of total county population; however Ashland is forecast to decline as a share of total countywide population.

Population outside UGBs is expected to grow by more than 4,700 people from 2015 to 2035, but is expected to grow at a much slower rate during the second half of the forecast period, only adding a little more than 2,000 people from 2035 to 2065. The population of the area outside UGBs is expected to decline as a share of total countywide population over the forecast period, composing 29 percent of the countywide population in 2015 and about 22 percent in 2065.

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

	2015	2035	2065	AAGR (2015-2035)	AAGR (2035-2065)	Share of County 2015	Share of County 2035	Share of County 2065
Jackson County	*211,275*	*255,840*	*306,858*	*1.0%*	*0.6%*	*100.0%*	*100.0%*	*100.0%*
Ashland[1]	20,905	23,183	24,138	0.5%	0.1%	9.9%	9.1%	7.9%
Central Point	18,329	22,680	27,485	1.1%	0.6%	8.7%	8.9%	9.0%
Eagle Point	9,657	14,839	18,669	2.2%	0.8%	4.6%	5.8%	6.1%
Medford	80,024	99,835	124,582	1.1%	0.7%	37.9%	39.0%	40.6%
Smaller UGBs[2]	21,987	30,199	44,865	1.6%	1.3%	10.4%	11.8%	14.6%
Outside UGBs	60,373	65,104	67,119	0.4%	0.1%	28.6%	25.4%	21.9%

Source: Forecast by Population Research Center (PRC)

[1] For simplicity each UGB is referred to by its primary city's name.

[2] Smaller UGBs are those with populations less than 8,000 in forecast launch year.

Medford, Jackson County's largest UGB, is expected to capture the largest share of total countywide population growth throughout the entire forecast period (Figure 17). The remaining larger UGBs all account for significant portions of countywide population growth, but they are all expected to capture a smaller share (in relative terms) of population growth during the final 30 years of the forecast period. The area outside UGBs is forecast to capture a decreasing share of countywide population growth as time progresses through the forecast period.

Figure 17. Jackson County and Larger Sub-Areas—Share of Countywide Population Growth

	2015-2035	2035-2065
Jackson County	*100.0%*	*100.0%*
Ashland[1]	5.1%	1.9%
Central Point	9.8%	9.4%
Eagle Point	11.6%	7.5%
Medford	44.5%	48.5%
Smaller UGBs[2]	18.4%	28.7%
Outside UGBs	10.6%	3.9%

Source: Forecast by Population Research Center (PRC)

[1] For simplicity each UGB is referred to by its primary city's name.

[2] Smaller UGBs are those with populations less than 8,000 in forecast launch year.

The remaining smaller UGBs are expected to grow by a combined number of more than 8,200 persons from 2015 to 2035, with a combined average annual growth rate of 1.6 percent (Figure 16). This growth rate is driven by expected rapid growth in Jacksonville, Phoenix, Rogue River, Shady Cove, and Talent (Figure 18). Butte Falls and Gold Hill are forecast to grow at average annual rates below one percent per year during the first 20 years of the forecast period. Similar to the larger UGBs and the county as a whole, population growth rates are expected to decline for the second half of the forecast period (2035 to 2065). Even so, the smaller UGBs are forecast to collectively add nearly 14,700 people from 2035 to 2065.

Figure 18. Jackson County and Smaller Sub-Areas—Forecast Population and AAGR

	2015	2035	2065	AAGR (2015-2035)	AAGR (2035-2065)	Share of County 2015	Share of County 2035	Share of County 2065
Jackson County	*211,275*	*255,840*	*306,858*	*1.0%*	*0.6%*	*100.0%*	*100.0%*	*100.0%*
Butte Falls[1]	421	437	447	0.2%	0.1%	0.2%	0.2%	0.1%
Gold Hill	1,267	1,496	2,018	0.8%	1.0%	0.6%	0.6%	0.7%
Jacksonville	2,927	4,316	6,687	2.0%	1.5%	1.4%	1.7%	2.2%
Phoenix	4,955	6,883	9,775	1.7%	1.2%	2.3%	2.7%	3.2%
Rogue River	2,838	3,705	5,545	1.3%	1.4%	1.3%	1.4%	1.8%
Shady Cove	3,168	4,343	6,105	1.6%	1.1%	1.5%	1.7%	2.0%
Talent	6,411	9,020	14,290	1.7%	1.5%	3.0%	3.5%	4.7%
Larger UGBs[2]	128,915	160,537	194,874	1.1%	0.6%	61.0%	62.7%	63.5%
Outside UGBs	60,373	65,104	67,119	0.4%	0.1%	28.6%	25.4%	21.9%

Source: Forecast by Population Research Center (PRC)

[1] For simplicity each UGB is referred to by its primary city's name.

[2] Larger UGBs are those with populations greater than 8,000 in forecast launch year.

All of Jackson County's smaller sub-areas are expected to capture an increasing share of countywide population growth over the 50-year forecast period (Figure 19).

Figure 19. Jackson County and Smaller Sub-Areas—Share of Countywide Population Growth

	2015-2035	2035-2065
Jackson County	*100.0%*	*100.0%*
Butte Falls[1]	0.0%	0.0%
Gold Hill	0.5%	1.0%
Jacksonville	3.1%	4.6%
Phoenix	4.3%	5.7%
Rogue River	1.9%	3.6%
Shady Cove	2.6%	3.5%
Talent	5.9%	10.3%
Larger UGBs[2]	71.0%	67.3%
Outside UGBs	10.6%	3.9%

Source: Forecast by Population Research Center (PRC)

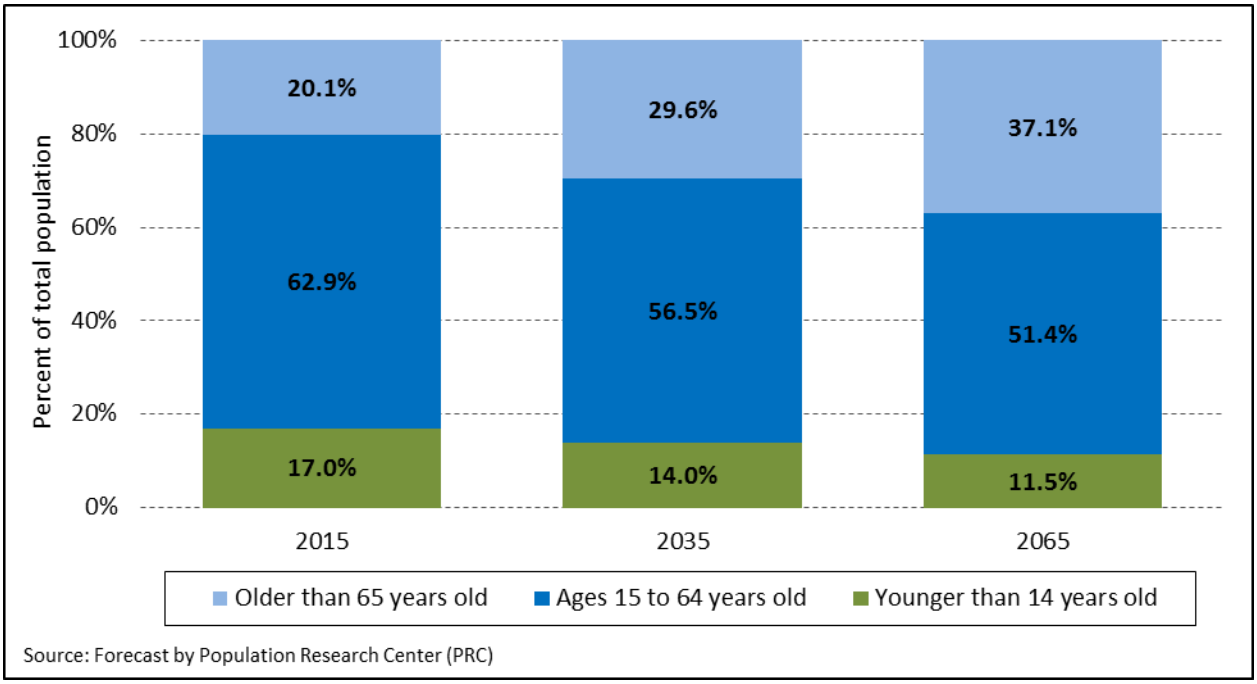
[1] For simplicity each UGB is referred to by its primary city's name.

[2] Larger UGBs are those with populations greater than 8,000 in forecast launch year.

Forecast Trends in Components of Population Change

As previously discussed, a key factor in both declining births and increasing deaths is Jackson County's aging population. From 2015 to 2035 the proportion of county population 65 or older is forecast to grow from a little over 20 percent to nearly 30 percent. By 2065 approximately 37 percent of the total population is expected to be 65 or older (Figure 20). 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 (http://www.pdx.edu/prc/opfp).

Figure 20. Jackson County—Age Structure of the Population (2015, 2035, and 2065)

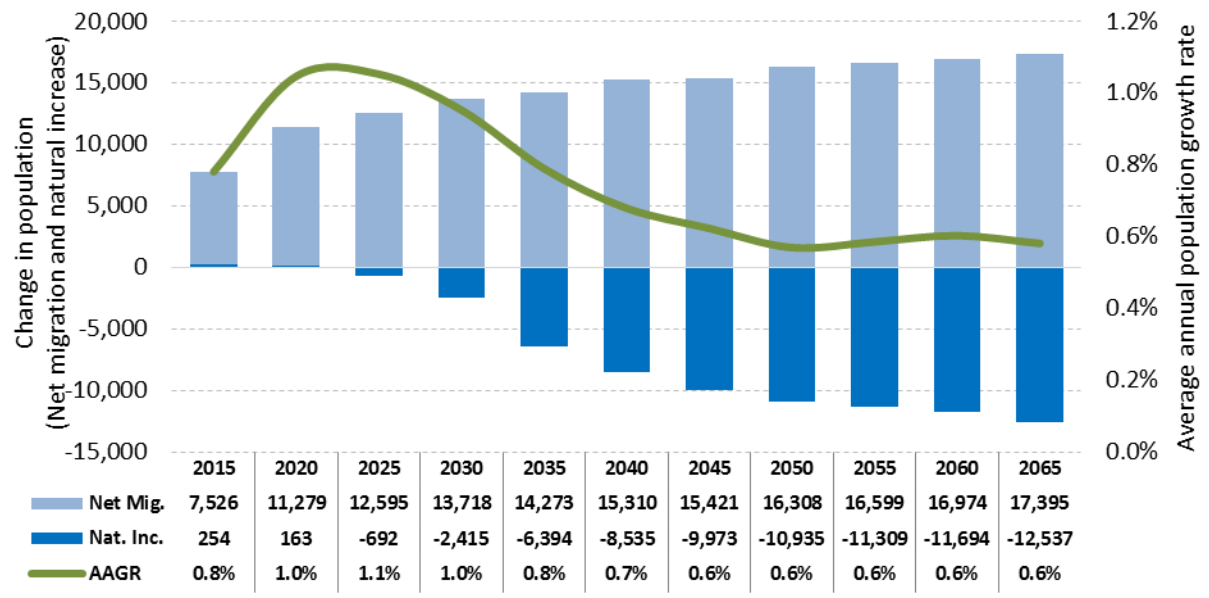


As the countywide population ages—contributing to a slow-growing population of women in their years of peak fertility—and more women choose to have fewer children and have them at an older age, average annual births are expected to decline, although slowly, over the forecast period; this combined with the rising number of deaths, will lead to a natural decrease (Figure 21). The total number of deaths countywide is expected to increase more rapidly in the near term, followed by slower growth during the later years of the forecast period. This pattern of initial growth in the number of deaths is explained by the relative size and aging patterns of the Baby Boom and Baby Boom Echo generations. For example, in Jackson County, deaths are forecast to begin to increase significantly during the 2025-2035 period as Baby Boomers age out, and peak again in the 2040-2050 period as children of Baby Boomers (i.e. Baby Boom Echo) experience the effects of aging.

As the increase in the number of deaths outpaces births, population growth in Jackson County is expected to become increasingly reliant on net in-migration; and in fact positive net in-migration is expected to persist throughout the forecast period. The majority of these net in-migrants are expected to be middle-aged and older individuals.

In summary, declining natural increase and steady net in-migration is forecast to result in population growth reaching its peak in 2025 and then tapering through the remainder of the forecast period (Figure 21). An aging population is expected to not only lead to an increase in deaths, but a smaller proportion of women in their childbearing years is expected to result in a long-term decline in births. Net migration is expected to grow steadily throughout the forecast period, but it will not fully offset the growth in natural decrease.

Figure 21. Jackson County—Components of Population Change, 2015-2065



	2015	2020	2025	2030	2035	2040	2045	2050	2055	2060	2065
Net Mig.	7,526	11,279	12,595	13,718	14,273	15,310	15,421	16,308	16,599	16,974	17,395
Nat. Inc.	254	163	-692	-2,415	-6,394	-8,535	-9,973	-10,935	-11,309	-11,694	-12,537
AAGR	0.8%	1.0%	1.1%	1.0%	0.8%	0.7%	0.6%	0.6%	0.6%	0.6%	0.6%

Source: Forecast by Population Research Center (PRC)

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 city 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 for a particular geographic area).

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: 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. The cities of Gold Hill and Talent did not submit survey responses.

Ashland—Jackson County

Observations about Population Composition (e.g. about children, the elderly, racial ethnic groups)	Observations about Housing (including vacancy rates)	Planned Housing Development/Est. Year Completion	Future Group Quarters Facilities	Future Employers	Infrastructure	Promotions (Promos) and Hindrances (Hinders) to Population and Housing Growth; Other notes
Ashland's persons per household number has decreased from 2.2 to 2.14 between 2000 and 2010. See demographic changes cited in Ashland 2012 Housing Needs Analysis	Vacancy rates for rental units (1%) and ownership units (4.2%) remained relatively unchanged between 2000 and 2010 A questionnaire of rental property owners conducted by	A Neighborhood Masterplan for a 94 acre residential area within the UGB is in review and adoption process. The Normal Neighborhood Plan area would accommodate 450-550 residential units of various housing types over a 20+ year planning period consistent with Ashland's	No new facilities identified	No new large scale employers are identified	See Transportation System Plan approved in 2013.	**Promos:** Has enough vacant land in Urban Growth Boundary to accommodate expected 20 year growth, with a total capacity of an estimated 2,853 dwelling units. **Hinders:** The overall impact of a low vacancy rate is that there are fewer options in the rental market when people are looking for a unit to rent. Retail and Service are the fastest growing employment sectors in Ashland. The average monthly earnings from jobs in the Retail sector ($2420) and Service sector ($2271) are insufficient to afford fair market rents in Ashland when measured as spending less than 30% of one's income

Ashland—Jackson County						
	the City in 2012 showed the current rental vacancy rate to be 1%.	Comprehensive Plan. (see www.ashland.or.us/normalplan)				on housing costs. However, this trend is not specific to Ashland; in general wages have been outpaced by housing costs for at least the past decade.
Highlights or summary of influences on or anticipation of population and housing growth from planning documents and studies	Ashland's Housing Needs Analysis 2012 cites the population growth rate of individuals 65 years old and older grew at a faster rate in Ashland than in the rest of the State, while the population of individuals between the ages of 35 and 44 actually declined. In the last decades Ashland has also seen a substantial decrease in the population of nearly all age groups between 15 and 55 (one exception was the 25-34 age groups which saw a 3.4% increase between 2000 and 2010). The populations of age groups 55 years old and older see growth. SOU's 2014 fall enrollment was 6,203 students, up from 6,140 a year ago, representing the first increase in fall enrollment since 2011, in contrast to an expected decrease projected by Oregon University System (see http://www.ous.edu/sites/default/files/factreport/enroll/files/enrdmnd.pdf).					
Other information (e.g. planning documents, email correspondence, housing development survey)	Ashland's low vacancy rate is symptomatic of a mismatch between the price of existing housing stock and the ability to pay for this housing. In short there is an abundance of high priced single family dwellings, but a shortage of affordable multi-family housing. The 2013 Housing Needs Analysis identified that "the largest dwelling unit gap exists for households earning less than $10,000 annually." This population makes up about 12 percent of all Ashland households. While there is clearly a gap in affordable dwelling units for renters, there is also a growing number of retirees moving to Ashland—a demographic that may have sufficient assets to purchase the higher priced single family dwellings. In any case the city is definitely facing a substantial shortage of affordable rental housing for its workforce. One constraint is the volume of buildable land which is currently zoned for multi-family residential use. The 2013 Housing Needs Analysis identifies solutions such as re-zoning commercial land to encourage more mixed use development, enforce current zoning ordinances to ensure multi-family development occurs in the areas already zoned for it, allow for and facilitate adaptive reuse and infill of existing built-out areas, etc.					

Butte Falls—Jackson County						
Observations about Population Composition (e.g. about children, the elderly, racial ethnic groups)	**Observations about Housing (including vacancy rates)**	**Planned Housing Development/Est. Year Completion**	**Future Group Quarters Facilities**	**Future Employers**	**Infrastructure**	**Promotions (Promos) and Hindrances (Hinders) to Population and Housing Growth; Other notes**
Elderly population is stable. No population decreases or increases.	Quite a few homes in foreclosure. Vacancy rate for rentals is low.	None	None	Water Bottling Plant will add an estimated 4 jobs.		**Promos:** **Hinders:**
Highlights or summary of influences on or anticipation of population and housing growth from planning documents and studies						

Butte Falls—Jackson County	
Other information (e.g. planning documents, email correspondence, housing development survey)	

Central Point—Jackson County

Observations about Population Composition (e.g. about children, the elderly, racial ethnic groups)	Observations about Housing (including vacancy rates)	Planned Housing Development/Est. Year Completion	Future Group Quarters Facilities	Future Employers	Infrastructure	Promotions (Promos) and Hindrances (Hinders) to Population and Housing Growth; Other notes
Remains consistent with 2010 U.S. Census population characteristics. Has been increased interest in retirement facilities, including some assisted living, but generally consistent with projections.	Occupancy Rates stable both for ownership and rental units. Significant majority (90+%) of new construction is for new housing.	North Village, Phase 1 (75 detached dwelling units) and 2 (31 detached dwelling units) pending receipt of a Letter of Map Revision from FEMA (est. timing Summer 2015). Estimated Build-out Fall 2018. Plans for development of the Eastside Transit Oriented District (8 duplexes, 30	No plans for future Group Quarters.	Combined Trucking will add in excess of 100 employees	City's infrastructure and capital improvement program adequate to serve planned growth.	**Promos:** Sufficient urbanizable land with infrastructure plus a fast and efficient land use process. **Hinders:** Economy

Central Point—Jackson County						
		townhomes, 288 apartments over three phases. Estimated timing summer 2016 start)				
Highlights or summary of influences on or anticipation of population and housing growth from planning documents and studies	City infrastructure is in good condition to accept projected growth. Currently preparing documentation to expand UGB as necessary to add more residential land.					
Other information (e.g. planning documents, email correspondence, housing development survey)	There are three approved housing development applications that will result in a total of 49 townhomes and 20 single family dwellings. The townhomes are expected to be built out by 2018 and the single family dwellings by 2016. The townhomes are targeted at first time home buyers as well as retirees looking to downsize. The single family dwellings are targeted at a more affluent home buyer, and are priced at $225,000 to $350,000.					

Eagle Point—Jackson County						
Observations about Population Composition (e.g. about children, the elderly, racial ethnic groups)	**Observations about Housing (including vacancy rates)**	**Planned Housing Development/Est. Year Completion**	**Future Group Quarters Facilities**	**Future Employers**	**Infrastructure**	**Promotions (Promos) and Hindrances (Hinders) to Population and Housing Growth; Other notes**
In the past 20 years Eagle Point has morphed from a small, working class, timber-oriented bedroom community to a more diverse, growing city with a broad range of neighborhoods, housing types and costs. Middle income families and retirees have been the town's primary market in recent years. Ethnicity here is almost 90% white, with Hispanic and mixed races making up most of the	Eagle Point has a wide variety of housing types, densities and costs, with noticeable distinctions between the north, south, and center of town. After a period of foreclosures and vacancies, existing stock is more stable now.	Please refer to the 2014 PSU Housing Development Survey for Eagle Point.	None planned beyond the existing senior housing development.	Same as current. Major employers in town are the Eagle Point School District and Walmart. However, over 90% of the working population commutes to other nearby cities (primarily Medford) for work.	Planned water system improvement and expansion as outlined in the 2013 Water System Master Plan; ongoing street capital improvements and maintenance.	**Promos:** Over 200 acres of vacant and subdivided land available for single family and multifamily home construction, along with a Town Center Plan that promotes urban, higher density residential infill and redevelopment. **Hinders:** Development within the SE area of City limited to 25 – 30 more residences before water supply has reached its maximum for that zone. An additional water tank is currently being planned.

Eagle Point—Jackson County						
remainder.						
Highlights or summary of influences on or anticipation of population and housing growth from planning documents and studies	The number of issued residential building permits increased significantly during the latter part of 2013, and has been picking up steam since then. The city is investing in maintenance of its existing infrastructure, particularly roads, water and storm water system. The Town Center Plan, adopted in 2008, envisions significant growth in and around the downtown, with a supply of residential and commercial infill and redevelopment opportunities that well exceed current market demand. At the same time, over 200 acres of available, subdivided and un-subdivided residential land is primed for construction. Further, in 2012 Eagle Point received approval from the State, and has since formally established, four urban reserve areas totaling almost 3,000 acres of land for future expansion outside the city's current urban growth boundary.					
Other information (e.g. planning documents, email correspondence, housing development survey)	Eagle Point has six housing development projects either under review or approved for construction. These projects—if built out to specifications—will result in 550 single family dwellings and 14 duplexes. The majority of the new houses—including the duplexes—will be targeting retirees and those able to afford housing priced at $300,000 to $700,000. Only 30 single family dwellings will be targeting working class families.					

Jacksonville—Jackson County						
Observations about Population Composition (e.g. about children, the elderly, racial ethnic groups)	**Observations about Housing (including vacancy rates)**	**Planned Housing Development/Est. Year Completion**	**Future Group Quarters Facilities**	**Future Employers**	**Infrastructure**	**Promotions (Promos) and Hindrances (Hinders) to Population and Housing Growth; Other notes**
High percentage of retired and empty nesters. High home prices make it difficult for young families with children. Predominantly white Caucasian.	High percentage of single family dwellings, very few multi-family developments.	See Housing Development Survey	None	None	City is in the process of looking into purchasing more water rights to satisfy the usage at our present time and eventual growth. It is already capable of handling a population up to approximately 5000. Recent water master plan update is mainly for upgrading the system for maintenance purposes.	**Promos:** The City's National Historic Landmark District brings tourism and commerce. Wine industry is growing in the area, more people visiting and deciding to purchase property. **Hinders:** The City of Jacksonville does not have an urban reserve area. The City's Urban Growth Boundary is identical to its City Limits with the exception of 10 acres. The City must expand its urban growth boundary before additional growth can occur.

Jacksonville—Jackson County	
Highlights or summary of influences on or anticipation of population and housing growth from planning documents and studies	City of Jacksonville. See above.
Other information (e.g. planning documents, email correspondence, housing development survey)	Within Jacksonville there are six housing development projects. All of these are approved, but two (39 single family dwellings) have not started construction yet. The remaining projects will yield 16 single family dwellings and 51 manufactured townhomes. The manufactured townhomes are targeting a mix of young families and retirees at $250,000 to $300,000. The remaining single family dwellings are mostly targeting a more affluent home buyer, with some lots projected to be above $400,000.

Medford—Jackson County						
Observations about Population Composition (e.g. about children, the elderly, racial ethnic groups)	**Observations about Housing (including vacancy rates)**	**Planned Housing Development/Est. Year Completion**	**Future Group Quarters Facilities**	**Future Employers**	**Infrastructure**	**Promotions (Promos) and Hindrances (Hinders) to Population and Housing Growth; Other notes**
One interesting thing I found out in the last Census was Medford had a younger population than Ashland (home of Southern Oregon University). Medford has a sizeable retirement population and is more affordable than many places in the Rogue Valley (easier for young families to buy a house).	The vacancy rates are extremely low in Medford.	There are two large multi-family developments being planned for downtown. Additional planned housing development is depicted on the Housing Survey.	Bonaventure Senior Living and Fern Gardens Phase III	Denny's Restaurant opening in 2015 (70 employees)		**Promos:** The city has just "upzoned" 40 acres of low density residential to higher density residential. **Hinders:**

Medford—Jackson County	
Highlights or summary of influences on or anticipation of population and housing growth from planning documents and studies	With Medford's population rate of increase roughly in line with the state (over the past 25 years), the City will taking a greater share of population in Jackson County. The following is an excerpt from the Population Element: "For many decades, Medford consistently made up a 30% to 33% proportion of the County population. The proportion increased to 36% in 2005; and the forecast increases this proportion to 42% in 2027 and to 44% in 2040. This is consistent with the Regional Problem Solving (RPS) program's future growth proposal, which increases Medford's share of the urban population in the County over roughly a 50-year period, allowing for some other cities to grow more slowly. The RPS program is designating Urban Reserve Areas for each city, which will ultimately be taken into the UGB to accommodate future growth."
Other information (e.g. planning documents, email correspondence, housing development survey)	Medford has 18 residential development projects which are either under construction or in the process of being approved. These projects, if built out, will result in about 216 single family dwellings and roughly 217 multi-family units. No price information was available.

Phoenix—Jackson County						
Observations about Population Composition (e.g. about children, the elderly, racial ethnic groups)	**Observations about Housing (including vacancy rates)**	**Planned Housing Development/Est. Year Completion**	**Future Group Quarters Facilities**	**Future Employers**	**Infrastructure**	**Promotions (Promos) and Hindrances (Hinders) to Population and Housing Growth; Other notes**
Established & growing latino community as demonstrated by latino-owned business cluster in downtown Phoenix	Multifamily vacancy is very low (roughly 1-2%); no single family rental; increasing single family fee simple infill development;	4 projects to begin construction in 2015 and finish in 2017, adding approximately 300 new dwelling units; Phoenix will annex approximately 1,229 existing dwelling units that are located within its designated Urban Reserve Areas within the next 5-10 years	None planned currently	Development of approximately 300 acres of employment land in next 10 years	All infrastructure is currently available to serve new residential and employment development	**Promos:** See comments below. **Hinders:** Regional economy is plagued by high unemployment, particularly at low skill levels, and wage stagnation. While competition for housing increases, many low and moderate income households will confront more barriers to securing quality housing that is consistent with their life circumstances and consumer preferences.

Phoenix—Jackson County	
Highlights or summary of influences on or anticipation of population and housing growth from planning documents and studies	Phoenix is initiating its first UGB amendment ever which includes the addition of residential and employment land. With the annexation of one Urban Reserve Area, it will increase its population by 50% of its 2015 estimated population. Comprehensive planning efforts are supportive of increasing density through infill development in existing residential neighborhoods and mixed use redevelopment projects that will achieve densities that are 2-3 times current densities. Phoenix will also be the beneficiary of development pressure in Ashland and Talent as low and median income homebuyers and renters are priced out of those communities. The City has also initiated ambitious community development projects with the goal of attracting developers, small businesses, and residents.
Other information (e.g. planning documents, email correspondence, housing development survey)	Phoenix has four residential development projects which are either under construction or in the process of being approved. These projects, if built out, will result in about 291 single and multi-family dwellings. Roughly 41 of these dwellings would be priced for young families or single professionals. Forty to fifty of these dwellings are intended for workforce housing or low income senior housing. No market information was provided for the largest development (approximately 200 dwellings). In addition to the planned residential development, Phoenix plans to annex roughly 1,229 dwellings into its UGB within the next 5-10 years.

Rogue River—Jackson County						
Observations about Population Composition (e.g. about children, the elderly, racial ethnic groups)	**Observations about Housing (including vacancy rates)**	**Planned Housing Development/Est. Year Completion**	**Future Group Quarters Facilities**	**Future Employers**	**Infrastructure**	**Promotions (Promos) and Hindrances (Hinders) to Population and Housing Growth; Other notes**
No reason to think the demographics of our population has changed in the last four years, nor to think that will change in the next four years.	Almost all new homes here are being built in a P.U.D. where buildings costs are $127,000 and selling costs are about $180,000	Foothill Estates is the P.U.D. It is about 35% complete and might be completed by the end of 2018.	None than we know of.	None that we know of. Except possible small business (Subway/Dollar General) with 1-12 employees each.	No plans for infrastructure improvements or expansions.	**Promos:** **Hinders:**
Highlights or summary of influences on or anticipation of population and housing growth from planning documents and studies	Only the Foothill Estates planned unit development (P.U.D.) as described above.					

Rogue River—Jackson County	
Other information (e.g. planning documents, email correspondence, housing development survey)	Rogue River has one housing development project approved and under construction. Twenty-four of the 74 total lots in the Foothills Estates P.U.D. are currently built. The target is small families and retirees, with a price ranging from $180,000 to $190,000.

Shady Cove—Jackson County						
Observations about Population Composition (e.g. about children, the elderly, racial ethnic groups)	**Observations about Housing (including vacancy rates)**	**Planned Housing Development/Est. Year Completion**	**Future Group Quarters Facilities**	**Future Employers**	**Infrastructure**	**Promotions (Promos) and Hindrances (Hinders) to Population and Housing Growth; Other notes**
Contrast between very wealthy (high income housing) and strong inventory of Manufactured dwelling in mobile home parks	Occupancy rates stable; Slow and steady construction on vacant lots	None	Unlikely	Unknown		**Promos:** Has enough land in and outside city for residential development, enough to accommodate at least 3,500 persons. **Hinders:** Properties along primary physical attraction (Rogue River) are occupied; Distance from medical services; Lack of municipal water.

Shady Cove—Jackson County	
Highlights or summary of influences on or anticipation of population and housing growth from planning documents and studies	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.
Other information (e.g. planning documents, email correspondence, housing development survey)	The response to the housing development survey stated that there are numerous scattered, but vacant lots in subdivisions. Beyond this there is no current or planned housing development.

Non-UGB Unincorporated Area—Jackson County						
Observations about Population Composition (e.g. about children, the elderly, racial ethnic groups)	**Observations about Housing (including vacancy rates)**	**Planned Housing Development/Est. Year Completion**	**Future Group Quarters Facilities**	**Future Employers**	**Infrastructure**	**Promotions (Promos) and Hindrances (Hinders) to Population and Housing Growth; Other notes**
						Promos: **Hinders:** .
Highlights or summary of influences on or anticipation of population and housing growth from planning documents and studies						

Non-UGB Unincorporated Area—Jackson County	
Other information (e.g. planning documents, email correspondence, housing development survey)	Jackson County recorded a total of 88 building permits issued for 2014. The majority of these building permits were for construction of single family dwellings, but a few were for duplex structures and out buildings.

Email Communication

Comment from State of Oregon DLCD: March25, 2015

Here are my comments as iterated in the meetings last week.

City of Talent- the City has some significant land constraint/availability issues that will likely affect their ability to grow at the level predicted. The City has a limited amount of land within its current UGB that is developable. What is developable has some fairly serious development constraints (e.g. railroad crossing, steep slopes). Also, they do not have much residential land in their Urban Reserve areas.

Glendale- Population estimates seem high for this community. Even if they have the infrastructure available to accommodate growth (which I'm not sure about) the estimates still seem high based on isolated location and limited services and employment.

Comments from City of Phoenix: March 26, 2015

I recently attended the Oregon Population Forecast Program in Medford and learned that the City of Phoenix had not submitted the housing development and demographic surveys. They have been completed and are attached.

I have the following general comments regarding the population forecast

The forecasts apply only to existing UGBs. The City of Phoenix and five other communities in the Rogue Valley have identified Urban Reserve Areas through a Regional Problem Solving planning process. In the case of Phoenix, one of those URAs consists of urbanized land that will be annexed by the City within the next 10 years. With approximately 1,229 dwelling units in this area the City's population will grow by 2,500 to 2,700 in a relatively short period of time. At the same time, Jackson County will lose that population.

Two other URAs, which are currently undeveloped agricultural land, will likely be included (at least in part) in the City's upcoming UGB amendment process. Between them, 124 acres have been designated for residential development. At an average density of 10 dwelling units per gross developable acre, we anticipate that these residential lands will accommodate approximately 1,240 new households or another 2,500 people. We expect this development to begin over the next 5 years, reaching its peak between 10 to 20 years, and reaching buildout within the next 30-40 years.

Please contact me with any questions or comments you might have.

Question from Jacksonville: March 17, 2015

I went to your presentation on the population forecast for Jackson County. We are concerned that the numbers the forecast reflect for Jacksonville are too high.

As I understand it, it sounds like you need comments fairly soon. Since next week is spring break, and some key people in our office are going to be gone, the soonest I can discuss this with our department and City Administrator is the week of March 30th.

Could you send me some information regarding the process? What would you need with regards to data?

One thing I can tell you right now is that our current water capacity will only support for a maximum population of about 5,000. Additionally, we have very little buildable land at this point. There are murmurs of possibly expanding our UGB, but even with that, I think the numbers in the forecast are still too high.

If you could let me know how we should proceed, and your timeline, that would be great.

Response from PSU: March 19, 2015

If you can send comments prior to March 31, that would be great. We will post the proposed forecasts on March 31. The formal challenge period begins April 1 and continues through May 15. We will request that evidence or additional data be submitted to us to consider for revising the proposed forecast (in addition to survey data previously submitted). The link below will take you to our web page where additional information can be found about the 45-day review/challenge period (deadlines, type of data to submit).

http://www.pdx.edu/prc/opfp

Your comments and information included in your email (this one) are helpful to have. We will revisit the forecast for Jacksonville and reevaluate our assumptions for future growth.

Follow up question from Jacksonville: March 26, 2015

Our Planning Director is out of town this week, so I haven't had the opportunity to sit down with her and our City Administrator about the numbers. We are planning on meeting early next week. Any chance we can have until Friday, April 3rd to send you our comments?

Follow up response from PSU: March 26, 2015

We cannot extend the period in which to respond to the preliminary forecasts because we release the proposed forecasts on March 31. The release of the proposed forecasts begins the formal challenge period.

We did adjust Jacksonville's forecasts down to account for lower density growth and issues with water rights.

If you check back later today, we can give you the revised average annual growth rates

Follow up questions from Jacksonville: March30, 2015

Could you send me the revised annual growth rates for the City of Jacksonville?

I am meeting with our City Administrator and Planning Director tomorrow morning and would like to show them the revised numbers.

Follow up response from PSU: March 30, 2015

Below are tentative Proposed numbers for Jacksonville for 2015, 2035, and 2065. As you'll see these numbers are roughly 400 lower in 2035 and 700 lower by 2065. The AAGR is now at 2% for the 2015-2035 period and remains at 1.5% for the 2035-2065 period.

Contact us with any questions or concerns.

	2015	2035	2065	AAGR (2015-2035)	AAGR (2035-2065)	Share of County 2015	Share of County 2035	Share of County 2065
Jackson County	*211,275*	*255,840*	*306,858*	*1.0%*	*0.6%*	*100.0%*	*100.0%*	*100.0%*
Butte Falls[1]	421	437	447	0.2%	0.1%	0.2%	0.2%	0.1%
Gold Hill	1,267	1,496	2,018	0.8%	1.0%	0.6%	0.6%	0.7%
Jacksonville	2,927	4,316	6,687	2.0%	1.5%	1.4%	1.7%	2.2%
Phoenix	4,955	6,883	9,775	1.7%	1.2%	2.3%	2.7%	3.2%
Rogue River	2,838	3,705	5,545	1.3%	1.4%	1.3%	1.4%	1.8%
Shady Cove	3,168	4,343	6,105	1.6%	1.1%	1.5%	1.7%	2.0%
Talent	6,411	9,020	14,290	1.7%	1.5%	3.0%	3.5%	4.7%
Larger UGBs[2]	128,915	160,537	194,874	1.1%	0.6%	61.0%	62.7%	63.5%
Outside UGBs	60,373	65,104	67,119	0.4%	0.1%	28.6%	25.4%	21.9%

Source: Forecast by Population Research Center (PRC)

[1] *For simplicity each UGB is referred to by its primary city's name.*

[2] *Larger UGBs are those with populations greater than 8,000 in forecast launch year.*

Other general inquiry for Jackson County and UGBs, April and May, 2015

Per telephone conversation and emails after the challenge period commenced, more information and insight about population growth in Jackson County and its sub-areas from a local planning firm were provided and discussed.

Appendix B: Specific Assumptions

Ashland

The total fertility rate (TFR) is assumed to stay slightly above the historical average TFR observed in the 2000s. Survival rates for 2060 are assumed to be a little above those forecast for the county as a whole. Ashland has historically had slightly higher survival rates than observed countywide; this corresponds with a slightly longer life expectancy. Age-specific net migration rates are assumed to generally follow historical patterns for Ashland, but at slightly higher rates over the forecast period.

Butte Falls

The annual housing unit growth rate is assumed to rapidly increase to one percent during the initial years of the forecast period and then gradually decline to zero over the remainder of the forecast period. The occupancy rate is assumed to steadily decline over the forecasting period, starting at a rate higher than observed in 2010 and ending at a rate slightly lower than observed in 2010. Average household size is assumed to slightly decrease over the forecast period. Group quarters population is assumed to stay steady over the forecast period.

Central Point

The total fertility rate (TFR) is assumed to begin at the rate observed in 2010 and then gradually decline over the forecast period. Survival rates for 2060 are assumed to be a little above those forecast for the county as a whole. Central Point has historically had slightly higher survival rates than observed countywide; this corresponds with a slightly longer life expectancy. Age-specific net migration rates are assumed to generally follow countywide historical patterns, but at slightly higher rates over the forecast period.

Eagle Point

The total fertility rate (TFR) is assumed to decline over the forecast period—although more slowly than it has historically—from the rate observed in 2010. Survival rates for 2060 are assumed to be a little above those forecast for the county as a whole. Eagle Point has historically had slightly higher survival rates than observed countywide; this corresponds with a slightly longer life expectancy. Age-specific net migration rates are assumed to generally follow historical patterns for Eagle Point, but at slightly higher rates over the forecast period.

Gold Hill

The annual housing unit growth rate is assumed to rapidly increase in the initial years of the forecast period and then slightly decline to a rate just greater than one percent and remain at this level for the duration of the forecast period. The occupancy rate is assumed to slightly increase during the initial years of the forecast period and then gradually decline through the remainder of the forecast period. Average household size is assumed to gradually decline over the forecast period. Group quarters population is assumed to remain at zero over the forecast period.

Jacksonville

The annual housing unit growth rate is assumed to slightly increase during the initial years of the forecast period and then gradually decline to a rate just above a long term historical average annual rate over the later years of the forecast period. The occupancy rate is assumed to slightly increase in the first few years of the forecast period and then gradually decline through the remainder of the forecast period, ending at rate slightly lower than what was observed in 2010. Average household size is assumed to gradually decline over the forecast period. Group quarters population is assumed to stay relatively steady over the forecast period.

Medford

The total fertility rate (TFR) is assumed to begin at the rate observed in 2010 and then gradually decline over the forecast period. Survival rates for 2060 are assumed to be a little below those forecast for the county as a whole. Medford has historically had slightly lower survival rates than observed countywide; this corresponds with a slightly shorter life expectancy. Age-specific net migration rates are assumed to generally follow countywide historical patterns, but at slightly higher rates over the forecast period.

Phoenix

The annual housing growth rate is assumed to rapidly increase during the initial years of the forecast period and then gradually decline over the remainder of the forecast period. The occupancy rate is assumed to remain slightly above 90 percent throughout the forecast period. Average household size is assumed to gradually decline over the forecast period. Group quarters population is assumed to stay relatively steady over the forecast period.

Rogue River

The annual housing unit growth rate is assumed to rapidly increase during the initial years of the forecast period and then decrease slightly and remain at this level through the remainder of the forecast period. The occupancy rate is assumed to slightly decrease over the forecast period, starting from the rate observed in 2010. Average household size is assumed to remain at about two persons per household over the forecast period. Group quarters population is assumed to stay relatively steady over the forecast period.

Shady Cove

The annual housing unit growth rate is assumed to rapidly increase during the initial years of the forecast period and then gradually decline to and remain at a rate slightly higher than a long term historical average over the duration of the forecast period. The occupancy rate is assumed to initially increase and then gradually decrease through the end of the forecast period. Average household size is assumed to gradually decline over the forecast period. Group quarters population is assumed to remain relatively steady over the forecast period.

Talent

The annual housing unit growth rate is assumed to rapidly increase during the initial years of the forecast period and then gradually decline through the end of the forecast period. The occupancy rate is assumed to slightly decline over the forecast period. Average household size is assumed to slightly

decline over the forecast period. Group quarters population is assumed to remain relatively steady over the forecast period.

Outside UGBs

The total fertility rate (TFR) is assumed to gradually decline over the forecast period from the rate observed in 2010. Survival rates for 2060 are assumed to be a little above those forecast for the county as a whole. The area outside UGBs in Lane County has historically had slightly higher survival rates than observed countywide; this corresponds with a slightly longer life expectancy. Age-specific net migration rates are assumed to generally follow countywide historical patterns, but at slightly higher rates over the forecast period.

Appendix C: Detailed Population Forecast Results

Figure 22. Jackson County—Population by Five-Year Age Group

Age Group	2015	2020	2025	2030	2035	2040	2045	2050	2055	2060	2065
00-04	11,470	11,439	11,502	11,558	11,608	11,516	11,432	11,339	11,343	11,359	11,356
05-09	12,213	11,626	11,620	11,713	11,826	11,813	11,737	11,620	11,592	11,622	11,652
10-14	12,208	12,699	12,115	12,140	12,295	12,349	12,353	12,243	12,190	12,187	12,233
15-19	12,733	12,308	12,832	12,273	12,357	12,448	12,521	12,493	12,454	12,428	12,440
20-24	12,723	12,490	12,167	12,732	12,240	12,258	12,367	12,407	12,454	12,443	12,433
25-29	11,694	12,453	12,273	11,994	12,610	12,065	12,103	12,181	12,296	12,373	12,381
30-34	12,255	12,282	13,148	13,002	12,770	13,363	12,808	12,821	12,979	13,135	13,237
35-39	12,032	13,182	13,304	14,295	14,207	13,890	14,560	13,927	14,023	14,231	14,423
40-44	11,835	12,999	14,346	14,535	15,697	15,532	15,215	15,918	15,316	15,461	15,716
45-49	12,643	12,716	14,054	15,566	15,855	17,050	16,907	16,534	17,405	16,793	16,983
50-54	14,465	13,475	13,633	15,129	16,850	17,097	18,431	18,250	17,965	18,970	18,344
55-59	15,885	15,270	14,296	14,525	16,219	18,002	18,321	19,733	19,678	19,442	20,586
60-64	16,613	16,876	16,286	15,310	15,654	17,428	19,402	19,736	21,411	21,434	21,243
65-69	14,745	17,416	17,851	17,326	16,403	16,736	18,711	20,832	21,363	23,284	23,398
70-74	10,253	14,592	17,443	18,005	17,610	16,946	17,430	19,516	21,509	22,091	24,157
75-79	7,165	9,589	13,801	16,629	16,706	17,246	16,306	17,265	19,160	21,163	21,834
80-84	5,376	6,187	8,388	12,181	14,846	15,235	15,880	15,060	15,837	17,653	19,603
85+	4,967	4,983	5,500	7,051	10,085	13,687	16,538	19,028	20,265	22,011	24,839
Total	*211,275*	*222,583*	*234,561*	*245,963*	*255,840*	*264,660*	*273,023*	*280,902*	*289,239*	*298,078*	*306,858*

Figure 23. Jackson County's Sub-Areas—Total Population

	2015	2020	2025	2030	2035	2040	2045	2050	2055	2060	2065
Ashland UGB	20,905	21,547	22,231	22,839	23,183	23,335	23,433	23,557	23,742	23,941	24,138
Butte Falls Town UGB	421	428	429	438	437	443	447	447	455	447	447
Central Point UGB	18,329	19,332	20,484	21,638	22,680	23,706	24,599	25,416	26,155	26,836	27,485
Eagle Point UGB	9,657	11,030	12,424	13,735	14,839	15,796	16,612	17,315	17,912	18,372	18,669
Gold Hill UGB	1,267	1,318	1,383	1,441	1,496	1,520	1,604	1,684	1,788	1,899	2,018
Jacksonville UGB	2,927	3,227	3,659	3,980	4,316	4,584	5,031	5,347	5,651	6,147	6,687
Medford UGB	80,024	84,813	89,917	95,002	99,835	104,598	108,917	113,026	117,001	120,892	124,582
Phoenix UGB	4,955	5,437	5,919	6,401	6,883	7,365	7,847	8,329	8,811	9,293	9,775
Rogue River UGB	2,838	2,938	3,158	3,421	3,705	3,975	4,247	4,538	4,850	5,185	5,545
Shady Cove UGB	3,168	3,462	3,756	4,049	4,343	4,637	4,930	5,224	5,517	5,811	6,105
Talent UGB	6,411	6,829	7,429	8,084	9,020	9,714	10,702	11,318	12,195	13,201	14,290
Outside UGBs	60,373	62,222	63,775	64,934	65,104	64,986	64,656	64,702	65,161	66,053	67,119

Photo Credit: A view of the rugged landscape along Highway 66 in the Cascade Mountains. (Photo No. jacDA0063) Gary Halvorson, Oregon State Archives

http://www.sos.state.or.us/archives/pages/records/local/county/scenic/jackson/103.html