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EUGENE CITY COUNCIL AGENDA

June 8, 2022

12:00 p.m. CITY COUNCIL WORK SESSION

As the state and community recover from the COVID-19 pandemic, City Council meetings will continue to be held using hybrid in person and virtual meeting technology. Information about online or other options for access and participation will be available at https://www.eugene-or.gov/3360/Webcasts-and-Meeting-Materials

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Meeting of June 8, 2022,
Her Honor Mayor Lucy Vinis Presiding

Councilors

Claire Syrett, President	Matt Keating, Vice President
Mike Clark	Greg Evans
Randy Groves	Emily Semple
Jennifer Yeh	Alan Zelenka

12:00 p.m. CITY COUNCIL WORK SESSION

1. WORK SESSION: GROWTH MONITORING

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EUGENE CITY COUNCIL
AGENDA ITEM SUMMARY

Work Session: Growth Monitoring Report Overview

Meeting Date: June 8, 2022
Department: Planning and Development
www.eugene-or.gov

Agenda Item Number: 1
Staff Contact: Heather O'Donnell
Contact Telephone Number: 541-682-5488

ISSUE STATEMENT
At this work session staff will present City Council with an overview of the first Envision Eugene Growth Monitoring Comprehensive Report 2012-2021, with particular focus on the report's key findings related to urban growth boundary planning, the recommendations, and the emerging issues. Council is requested to accept the report.

BACKGROUND
As part of Envision Eugene, City Council adopted a baseline urban growth boundary (UGB) based on assumptions about how the community would grow in the future. During the process the Council also initiated several projects, including establishing urban reserves, growth monitoring and updating the City's needed housing (clear and objective) regulations.

The UGB was adopted with the understanding that there would be regular check-ins with Council on actual development trends and adjustments to strategies along the way through a growth monitoring program. City Council recognized that the current systems for tracking growth were not enough to meet community needs and expectations. In some cases, data was simply not available. In other cases, reconstructing data was complex, time consuming, and very expensive. The City needed a better system for collecting and tracking data to be in a better position to address changing trends or unforeseen circumstances.

Establishing a robust monitoring program not only follows the Envision Eugene commitment to the community and to Council direction, it also provides more accurate data that will be accessible to the community,

including City Council. This approach allows the community and Council to focus on important conversations about strategies for accommodating growth, rather than about the quality of the underlying data. In July 2015, Council directed staff to deliver the first monitoring report to Council within three years of the State's acknowledgement of Eugene's UGB. That timeline has since been updated. See Attachment A for how growth monitoring, UGB planning, and urban reserves relate. The Council last received an update on the Growth Monitoring Program at their April 14, 2021 meeting.

Relationship to Council Policy Direction and Goals

The Envision Eugene Recommendation, which was approved by Council as a basis for preparing the UGB adoption package, includes a pillar entitled "Adaptable, Flexible and Collaborative Implementation" that provides the foundation for the Growth Monitoring Program. It includes several strategies to create an ongoing monitoring system to collect and track information related to assumptions made about the next 20 years of growth within the UGB, as well as measure success in achieving the community's goals.

Council initiated program development during the UGB process in 2015. To formalize the Envision Eugene strategies, the Envision Eugene Comprehensive Plan, adopted by City Council along with the UGB, includes policies requiring establishment of a growth monitoring program and regular reporting (see the Administration and Implementation chapter, starting on page A&I-3).

By providing regular and transparent data and reporting, the program is also consistent with and can help support the Council goals of "Sustainable and Accountable Development" and "Equitable, Effective, Accountable Municipal Government."

There are several other City projects, plans or programs that Council has provided direction on or approved that monitoring can support with regular reporting. The Housing Implementation Pipeline is a recent example; monitoring can support this work through regular reporting on housing permits and development incentives. Other examples include the Climate Action Plan 2.0, Transportation System Plan, the Consolidated Plan, smart cities, triple bottom line, Urban Reserves and UGB analysis.

Growth Monitoring Program Progress to Date

As directed by City Council and as provided in the Envision Eugene Comprehensive Plan, a cross-department staff team have been developing the Growth Monitoring Program, led by Planning and Development and Central Services/Information Services staff. The City Council provided $75,000 for program development in 2016. The Envision Eugene Technical Advisory Committee (EETAC), ranging from 12-15 community members and including representatives from the City Council, Planning Commission and Sustainability Commission, has been providing feedback along the way. Councilor Jennifer Yeh is the City Council's representative on the EETAC. For more information on the EETAC and their meetings see https://www.eugene-or.gov/3942/Envision-Eugene-Technical-Advisory-Commi.

An illustration of the components of the monitoring system is in Attachment B. All components of the program related to quantitative data have made great progress, including now publishing the first comprehensive monitoring report. Rather than detailing the progress on each component,

this work session will be focused on the report itself. For more information on the program or progress, see the program update provided to City Council on April 14, 2021.

Monitoring Reports

The Envision Eugene Comprehensive Plan policies direct staff to develop two types of reports to monitor Eugene's growth and development trends. The first is to provide a "comprehensive" monitoring report, that covers trends across a large variety of these topics over the monitoring period. After this report, future reporting on a smaller set of key data will be done annually, and a comprehensive report like this one will be completed every five years or as needed, such as to align with state UGB and housing analysis requirements. The reports are intended to provide monitoring snapshots that compare current data to adopted assumptions, to help decision makers assess previous policy decisions and determine whether changes to growth management strategies are needed. The reports are not intended to always include conclusions about why outcomes did or did not happen. Instead, deeper evaluation may need to occur with future analysis of the UGB or during other related planning efforts.

In conjunction with this first report, infographic sheets (Attachment C), by topic area, have been developed to provide a quick and visual high-level summary of some of the key findings in the report's Executive Summary and snapshots.

The first Envision Eugene Growth Monitoring Comprehensive Report 2012-2021 (Attachment D) and related appendices (Attachment D.1) are attached here.

- This Monitoring Report is the culmination of several years developing the new data collection methods and reporting platforms and incorporating feedback on the results from the **EETAC, ECONorthwest** (economic consulting firm)**,** and **City staff in the Planning, Building Permit Services, Information Services, and Community Development Divisions**.
- Beginning in November 2021, the **EETAC** reviewed drafts of the report and appendices over several meetings, concluding by unanimously recommending that staff forward the report to the Planning Commission for consideration. The report's Recommendations, however, are specifically from staff and are the result of not just the data in the report but staff's involvement in other work that could directly impact monitoring in the future, like UGB planning and the City's Housing Implementation Pipeline.
- The **Planning Commission** reviewed the Monitoring Report at their April 12, 2022 meeting and recommended forwarding the report to Council for consideration. Their discussion supported several of the items in the report's Recommendations and Emerging Issues sections, including continued monitoring/focus on efficiency measures, student enrollment and housing trends, middle housing, vacancy rates and population migration. Since the Commission's meeting, the report and appendices attached here have been updated for clarity, formatting, and in response to Planning Commission comments.

Monitoring Report and Appendices Organization

The 2012-2021 Monitoring Report and Appendices are organized to provide different layers of information, depending on the reader's level of interest.

- Section II **Executive Summary** is higher level and pulls all the pieces together into a

synopsis. At the end of each topic area summary, the Executive Summary includes breadcrumbs for where to dive a little deeper into the details.

- Section III **Recommendations,** regarding future growth monitoring or planning-related actions, are specifically from staff and are the result of not just the data in the report but staff's involvement in other work that could directly impact monitoring in the future.
- For more background on what growth monitoring is and how to use the report, see report Section V **Introduction / How to Use this Report**.
- For more information on the growth monitoring data collection system and *tips on reading charts*, see Section VI **Overview of Collection and Reporting System**.
- The **key questions** and **snapshots** in the topic-specific starting at Section VII make up most of the report and give a slightly more detailed but still high-level summary about topic areas and include key data and figures.
- Section XIV **Emerging Issues** lists issues to be aware of or potentially consider in the future, both as part of the Monitoring Program and in other planning-related efforts.
- For those wanting a deeper data dive, **Appendices A-K** include many more charts and details about data sources, definitions, the relationship of the data to the previous UGB analysis, and chart summaries and takeaways. The Appendices are organized by topic area, generally in the same order as the topic areas in the report's snapshot sections.

<u>Report Highlights</u>

With so many topics covered in the report, even the Executive Summary is twelve pages. Therefore, at the June 8, 2022 work session, staff will highlight select key findings related to topics of previous Council focus or that have a key relationship to UGB planning. Staff will also provide an overview of the Recommendations and the Emerging Issues. A few report highlights include:

- Population and jobs both grew faster over the monitoring period than their forecasts, new forecasts for both indicate slowing down, matching the adopted forecast rates.
- 72% of new housing has been multi-family (compared to the forecast for 45%) and 93% of those have been structures with five or more dwellings.
- Recommendation: Plan for all land needs (not just housing) during the next UGB analysis.
- Recommendation: Continue monitoring efficiency measures for housing and employment development.
- Recommendation: Plan infrastructure for housing and the Clear Lake UGB expansion area.
- Emerging Issues: Impacts of new state requirements for future housing planning and climate friendly and equitable communities.
- Emerging Issues: Impacts of COVID-19 on future planning for employment land needs.

<u>Cautions</u>

This is the first time we've done something like this. And while every attempt has been made to provide accurate data within the time and resource limitations allowed, there are bound to be issues that make the data reasonable while still less than perfect. While we have aimed to automate the process as much as possible to reduce errors and save time, some errors will still occur, and some manual entry and review will still be necessary. Additionally, some data may not be updated or may become outdated while report development and review is in progress. Regular reporting that incorporates adjustments and corrections will be a critical component to the success of the program and reliance on the data.

Triple Bottom Line
The Growth Monitoring Program is intended to provide information about a wide spectrum of metrics to help inform growth management decisions, including as those decisions relate to social equity, environmental stewardship and economic prosperity. Examples include data on demographics, housing affordability and development, median income, jobs and rate of growth.

Next Steps
The program focuses for the next year include continued development of a community data dashboard, and collection and analysis of 2021-2022 data in preparation for the first annual monitoring report. A draft of the first 2022 annual report is anticipated for the first half of 2023. After review by the EETAC it will be presented to the Planning Commission for input and then provided to Council.

As the program establishes an annual reporting cycle, there will be more monitoring data to inform the next UGB analysis. Regular monitoring will be important given the new state deadline stipulated by House Bill 2003 (2019) to adopt Eugene's next housing needs (capacity) analysis by December 2026 (and every eight years thereafter). Over the next year, staff anticipate turning our attention towards the next UGB analysis, concurrent with implementation of the upcoming Climate Friendly and Equitable Communities rules.

Budget
As a program, rather than a project with an end date, growth monitoring will have on-going support needs that were not previously identified, such as information technology staff to support the database, collection and reporting systems as well as consultant review of monitoring results. The FY23 budget includes $400,000 for state-mandated planning work support, a portion of which is anticipated as one-time funding towards the Growth Monitoring Program.

PREVIOUS COUNCIL DIRECTION
July 20, 2015 Work Session

Move to direct the city manager to prepare an urban growth boundary adoption package and to take the other actions that are part of the "Hybrid Option" as described in this AIS. [Motion passed]

April 14, 2021 Work Session

The Council last received an update on the Growth Monitoring Program at this work session.

COUNCIL OPTIONS
A. Accept the annual Growth Monitoring Report as presented.
B. Direct City Manager to bring back more information regarding Growth Monitoring for discussion.

CITY MANAGER'S RECOMMENDATION
The City Manager recommends that Council accept the Envision Eugene Growth Monitoring Comprehensive Report 2012-2021.

SUGGESTED MOTION
Move to accept the Envision Eugene Growth Monitoring Comprehensive Report 2012-2021.

ATTACHMENTS
A Growth Monitoring and Urban Reserves graphic
B. Components of the Monitoring System Graphic
C. Infographics: Population & Affordability, Employment, Housing Development, and Land Supply- Housing, Land Supply- Employment
D. Envision Eugene Growth Monitoring Comprehensive Report 2012-2021 (May 25, 2022)
    1. Envision Eugene Growth Monitoring Comprehensive Report 2012-2021 Appendices (May 25, 2022)

FOR MORE INFORMATION
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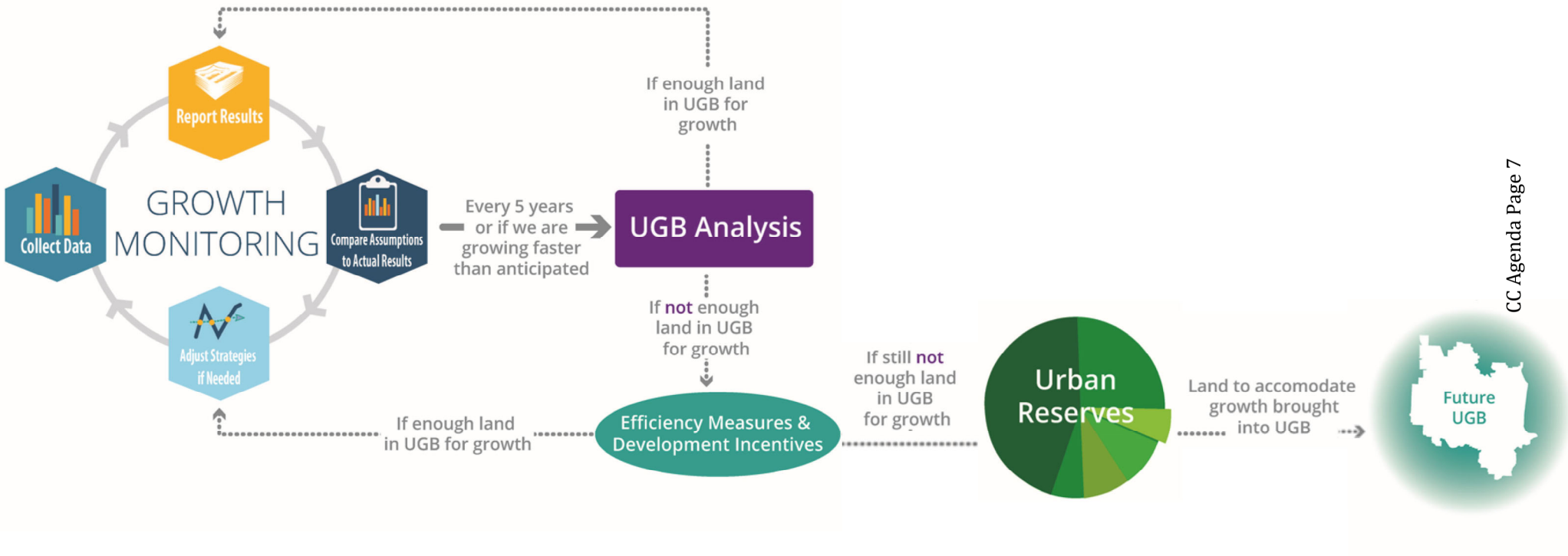
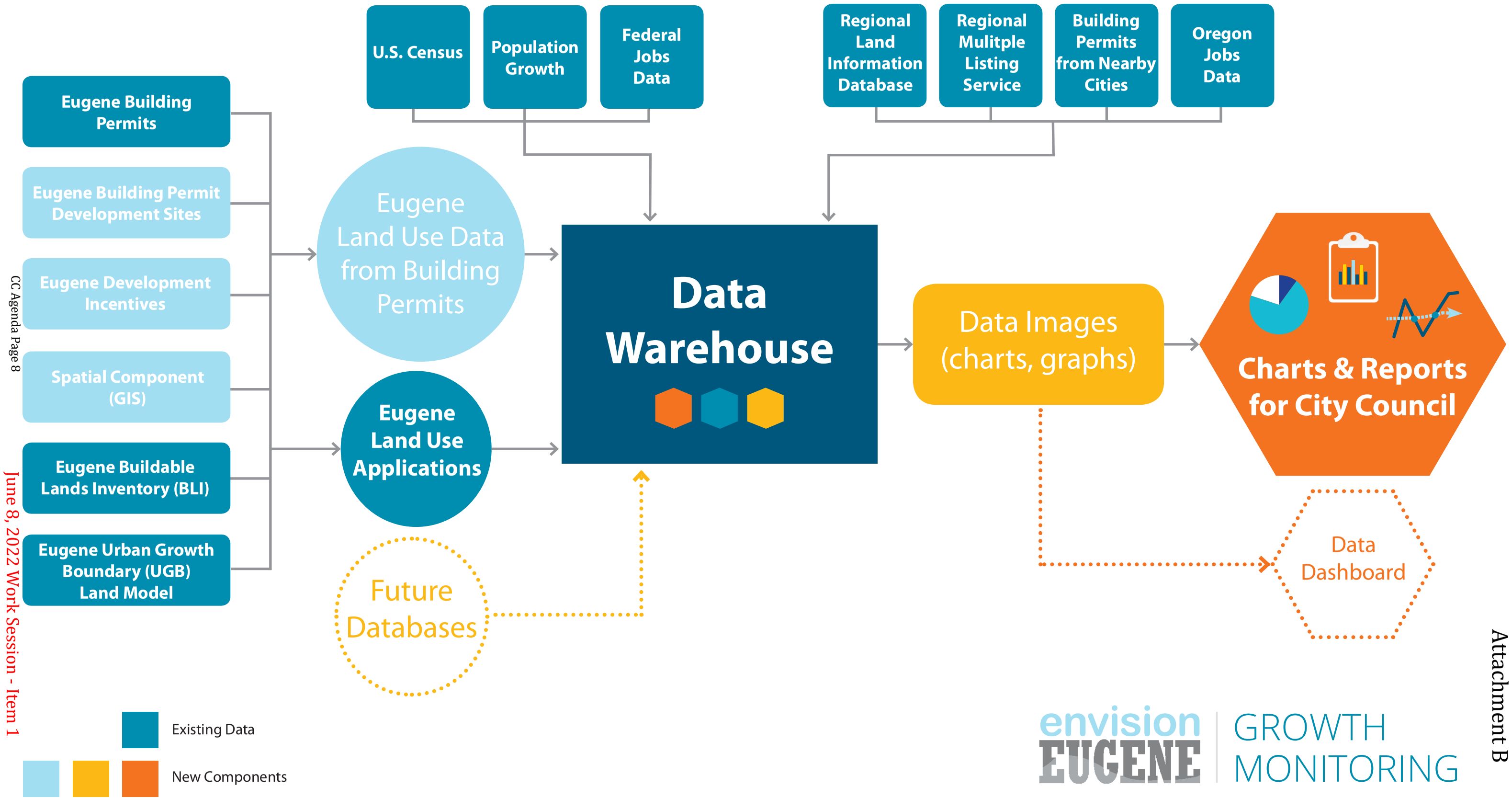
MONITORING AND PLANNING FOR GROWTH



Monitoring System

Component Interconnectivity



envision EUGENE | GROWTH MONITORING

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Attachment B

POPULATION & AFFORDABILITY 2021 MONITORING SNAPSHOT

Attachment C

How Are We Growing?

1.2%* + **1.4%**** = **17,291**

ANNUAL POPULATION GROWTH .9% FORECAST

ANNUAL HOUSING GROWTH 1.1% FORECAST

NEW **EUGENEANS** 2012-2021

34,000 FORECAST FOR 2012-2032

*Portland State University Annual Certified Estimate for 2012 through 2021. ** Growth Monitoring - Monitoring period is end of 2012 to mid 2021

Who Lives in the Community?

THERE WILL BE MORE RESIDENTS OVER 75

67%

Ages **75+** expected to grow **67%** by 2045

Portland State University 2021 Forecast for Lane County

AGES 20-24 WILL CONTINUE TO BE THE LARGEST SHARE OF THE POPULATION THROUGH 2045

UO projects continued moderate enrollment growth.

POPULATION FORECAST

2027 Deaths will outpace births but with inmigration net growth will continue

2040 to 2070 Population growth rate slowing from **.9%** to **.5%** through 2070

How Affordable is the Community?

Housing Affordability*

$51,300

Median Household Income Increased **31%** since 2012

Oregon's median income is $67,000

$1,099

Median Rent Increased **32%** since 2012

$395,000

Median Sales Price **

Since 2012 the median price of single family dwellings increased 119%

41%

of households are cost-burdened

Spending over 30% of income on housing

56% of renters

25% of owners

*2019 ACS 1-year

** Regional Land Information Database Sales Data for 2021

GROWTH MONITORING

PREPARING FOR CHANGE WITH BETTER DATA

Data is related to Eugene 2012-mid-2021 unless otherwise noted. Sources are Eugene Growth Monitoring unless otherwise noted.

EMPLOYMENT 2021 MONITORING SNAPSHOT

Attachment C

What is Eugene's Job Growth?

1.4% EUGENE 2012-2032 FORECAST » **3.1%** ANNUAL JOB GROWTH 2012-2018 » **1.4%** LANE COUNTY 2020-2030 FORECAST

19,701* TOTAL NEW JOBS

JOB GROWTH 2012 - 2018

*Oregon Employment Department , jobs covered by unemployment insurance

EUGENE'S JOBS ARE
13% Commercial Retail
55% Commercial Non-Retail
15% Government
18% Industrial
Jobs categories in 2018 were similar to the forecast

Income & Poverty

Median Household Income*

Eugene

Lane County

Oregon

*2019 ACS 1-year

Children eligible for free or reduced price meals*

Lane County

*Oregon Hunger Task Force, based on 2017 data

POVERTY RATES

17% ↓ trending down
Eugene Community Members living in poverty in 2019* compared to **27.6%** in 2012

11.4%
Oregon Community Members living in poverty in 2019 compared to 17.2% in 2012*

*2019 ACS 1-year

Unemployment Rate

Trending down!
2011 **9.1%** ↓ 2018 **4.1%***

*Bureau of Labor and Statistics, Local Area Unemployment Statistics (LAUS)

GROWTH MONITORING
PREPARING FOR CHANGE WITH BETTER DATA

Data is related to Eugene 2012-mid-2021 unless otherwise noted.

HOUSING DEVELOPMENT 2021 MONITORING SNAPSHOT

Attachment C

How Much New Housing Have We Seen?

NEW DWELLINGS

New DWELLINGS TOTAL* **8,011**

2012-2021 OUT OF 15,105 NEEDED BY 2032

5,742 MULTI DWELLINGS

2,191 SINGLE DETACHED DWELLINGS

78 SINGLE ATTACHED DWELLINGS

*The net new dwellings monitoring data is from permits approximately Dec 2012-July 2021

What Type of Housing Have We Seen?

New Dwellings 2012 - 2021

SINGLE DETACHED **27%**
55% FORECAST 2012-2032

SINGLE ATTACHED **1%**
8% FORECAST 2012-2032

MULTI DWELLING **72%**
37% FORECAST 2012-2032

93% are buildings with 5+ dwellings

Have Efficiency Measures Been Used?

NEW DWELLINGS WITH EFFICIENCY MEASURES**

71 DWELLINGS
Low Density Residential
REDESIGNATION
Forecast* 645 Dwellings

629 DWELLINGS
DOWNTOWN INCENTIVES
Forecast 1,003 Dwellings

405 MEDIUM DENSITY DWELLINGS
Forecast 621 Dwellings

154 DWELLINGS
AFFORDABLE HOUSING LAND BANK SITES
Forecast 55 Dwellings

21 MORE ACCESSORY DWELLINGS THAN THE AVERAGE ***

2,248
NEW **DWELLINGS** WITH EFFICIENCY MEASURES OUT OF **3,296** NEEDED FOR 2012-2032

GROWTH MONITORING
PREPARING FOR CHANGE WITH BETTER DATA

*Forecast is for 2012-2032.
**Efficiency measures are City actions to increase development beyond past trends.
***Averaging 15.3/year July 2018-July 2021 compared to 8.6/year pre-2012

Data is related to Eugene 2012-mid-2021 unless otherwise noted. Sources are Eugene Growth Monitoring unless otherwise noted.

LAND SUPPLY
2021 MONITORING SNAPSHOT - HOUSING

How Much Land Has Developed for Housing?

MORE NEW HOUSING OCCURRED ON DEVELOPED LAND THAN FORECAST*

NEW DWELLINGS ON VACANT OR PARTIALLY VACANT LAND

54%

77% FORECAST 2012-2032

NEW DWELLINGS ON DEVELOPED LAND

41%

23% FORECAST 2012-2032

48% of dwellings on Developed Land were on Commercial Land

510 TOTAL RESIDENTIAL ACRES DEVELOPED FOR 5,405 NEW DWELLINGS

THAT IS ...

18% of forecast the for Low Density land (lower than expected)

26% of the forecast for Medium Density land

73% of the forecast for High Density land (higher than expected)

33 COMMERCIAL ACRES DEVELOPED FOR 2,314 NEW DWELLINGS

THAT IS ...

38% of the forecast for Commercial land

123% of dwellings forecast on Commercial land (higher than expected)

8,011

Total New Dwellings Have Developed

15,105 FORECAST 2012-2032

GROWTH MONITORING
PREPARING FOR CHANGE WITH BETTER DATA

*Forecast is for 2012-2032.

Data is related to Eugene 2012-mid-2021 unless otherwise noted. Sources are Eugene Growth Monitoring unless otherwise noted.

LAND SUPPLY
2021 MONITORING SNAPSHOT - EMPLOYMENT

How Much Land Has Developed for Employment?

COMMERCIAL AND INDUSTRIAL LAND HAS DEVELOPED SLOWER THAN ANTICIPATED

178
Acres of Commercial and Industrial Land Have Developed with Employment Uses
1,404 FORECAST 2012-2032

THAT IS ...

13% of the forecast for Commercial & Industrial land

90% of the forecast for Developed/Commercial land (higher than expected)

10% of the forecast for Industrial (lower than expected)*

*Over half of the industrial land forecast to develop is in the **Clear Lake Expansion Area** which does not have utilities yet to annex

LAND DEVELOPED WITH EMPLOYMENT EFFICIENCY MEASURES ** HAS BEEN SLOWER THAN ANTICIPATED

17
ACRES DEVELOPED WITH EMPLOYMENT EFFICIENCY MEASURES
174 ACRES FORECAST

DEVELOPED WITH DOWNTOWN INCENTIVES	DEVELOPED IN THE E-1 CAMPUS EMPLOYMENT ZONE	DEVELOPED IN THE ENTERPRISE ZONE	DEVELOPED IN THE E-2 MIXED USE EMPLOYMENT ZONE, BROWNFIELD ASSESSMENT, RE-DESIGNATED LAND
4 ACRES	**1** ACRES	**12** ACRES	**0** ACRES

ONLY **10%** OF THE FORECAST IS MET

*Forecast is for 2012-2032.
**Efficiency measures are City actions to increase development beyond past trends.

GROWTH MONITORING
PREPARING FOR CHANGE WITH BETTER DATA

Data is related to Eugene 2012-mid-2021 unless otherwise noted. Sources are Eugene Growth Monitoring unless otherwise noted.

Envision Eugene Growth Monitoring Comprehensive Report

2012-2021

GROWTH MONITORING
PREPARING FOR CHANGE WITH BETTER DATA

I. Introductory Note from the Planning Director

Welcome to the City of Eugene's first comprehensive Growth Monitoring report! I am thrilled to share this report with you, and I look forward to seeing how this data can help inform our community as we continue to plan for future growth.

The concept for this report was born out of the Envision Eugene process, the largest community engagement process undertaken by the City of Eugene. Envision Eugene is the community's vision for how Eugene will accommodate 20 years of growth in a way that enhances the quality of life and reflects the shared values for all community members. A key component of implementing the community vision was adoption of a Eugene-specific urban growth boundary (UGB), which is intended to provide enough land for housing, jobs, parks and schools for 20 years of population growth, through 2032. During this process, there was strong recognition from community members and decision makers that no matter how well-founded the assumptions relied upon in establishing the UGB were, not all the assumptions will be correct and that the City's plan needs to be flexible to address changing conditions and needs of the community.

As a result, one of the seven pillars or values of Envision Eugene, referred to as Pillar 7, is to provide for adaptable, flexible and collaborative implementation. Pillar 7 specifically calls for the creation of an ongoing monitoring system to collect and track key information, including the identification of specific factors to be monitored and types of data needed to support monitoring, the development of a system for tracking the data, and the production of clear reports for the purpose of regular evaluation.

As reflected throughout this report, significant headway has been made on establishing the monitoring system, with more work on the horizon. Future reporting on key data will be done annually whereas a comprehensive report like this one will be completed every five years or as needed, such as to align with state UGB and housing analysis requirements. The reports are intended to provide monitoring snapshots that compare current data to adopted assumptions, to help decision makers assess previous policy decisions and determine whether changes to growth strategies are needed. The reports are not intended to always include conclusions about why outcomes did or did not happen. Instead, deeper evaluation will occur with future analysis of the UGB or during other related planning efforts.

The Growth Monitoring Program will adjust over the years as state law and local conditions change, like planning for housing differently than in the past (e.g., the middle housing project) and responding to the State's work on climate friendly and equitable communities. That means that while the program aims to provide a standardized format for data and reporting, future reports may look different than this one.

While the concept for the report was born out of the Envision Eugene process, the realization of this report required a collaborative and dedicated cross-departmental team of City of Eugene

staff, along with the help of eagle-eyed volunteers on the Envision Eugene Technical Advisory Committee. This team developed a Growth Monitoring Program from scratch, which involved thousands of hours of time, resolve, creative problem-solving and grit. After many years in the making, the team is excited to present this first comprehensive report.

Acknowledgements

Envision Eugene Technical Advisory Committee

Tiffany Edwards (Chair) (Planning Commissioner)
Kevin Shanley (Co-Chair)
Jennifer Yeh (City Councilor)
Dennis Reynolds (Sustainability Commissioner)
Lisa Arkin
John Barofsky
Alexis Biddle
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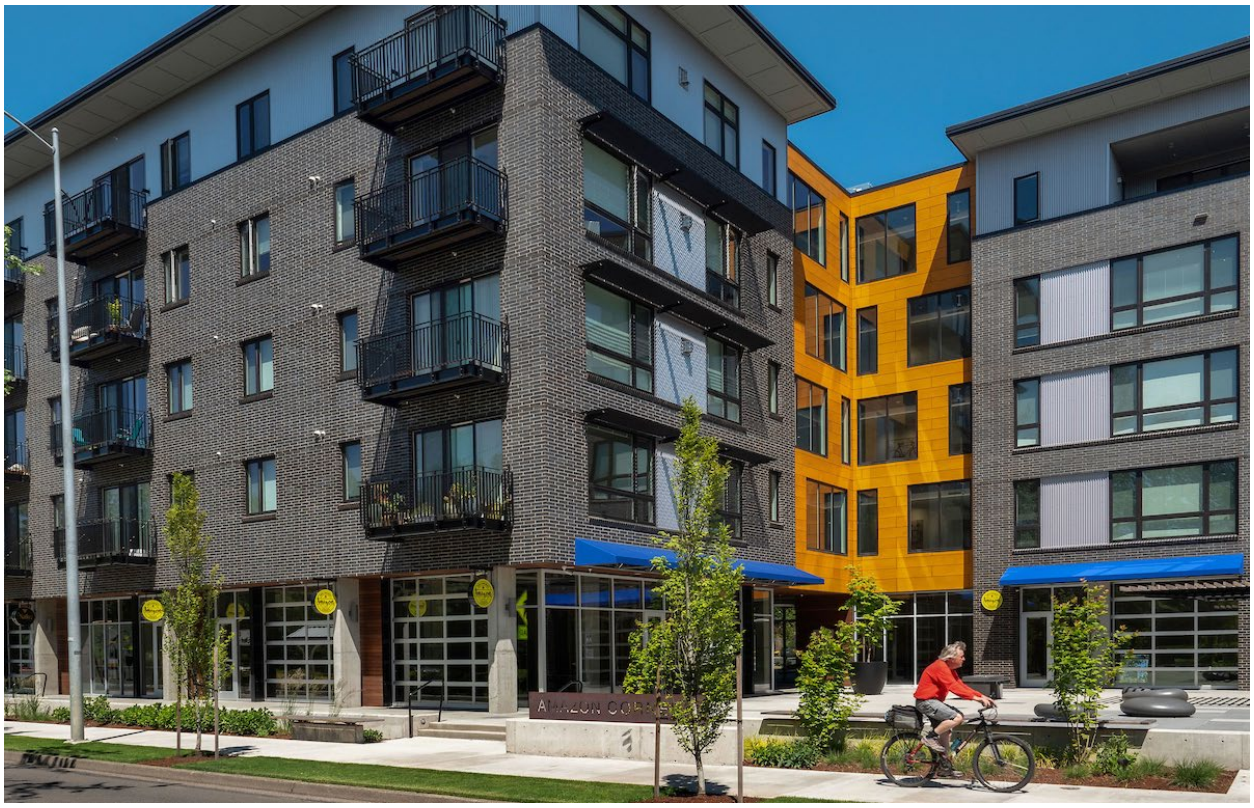

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II. Executive Summary

The Growth Monitoring Program and this report cover a wide range of topics and data related to how Eugene is growing compared to how it was anticipated Eugene would grow when the last urban growth boundary analysis was conducted (2012). From population and job growth to building permits and many topics in between, the Executive Summary provides a (relatively!) short summary for each topic area. At the end of each topic area, the Executive Summary includes breadcrumbs for where to get more details, dive a little deeper later in the report under the topic area "snapshots" and which appendix to see for an even deeper data dive.

For more background on what growth monitoring is and how to use this report, see section V. Introduction / How to Use this Report (page 25). For more information on the growth monitoring data collection system and tips on reading charts, check out section VI. Overview of Collection Reporting System (page 32). Whatever level you wish to explore, thank you for reading!

Population

Eugene's population has **increased by more than 17,000 people during the monitoring period (2012-2021), growing at 1.2% per year, faster than the Adopted Forecast rate of 0.9% for the planning period (2012-2032)**. The most recent official population forecast from Portland State University (2021) projects continued growth, slightly

1.2%+

ANNUAL
POPULATION GROWTH
.9% FORECAST

(2012-2021 annual rate
2012-2032 forecast
Portland State University)

Photo provided by Eugene Sunday Streets staff.

slower than Eugene has experienced recently but matching the adopted growth rate of 0.9%, and then slowing after 2040 (to 0.5% growth rate). With Oregon's lower than national average fertility rate and Lane County's older population, deaths will outpace births starting in 2027 but migration into Lane County will still result in net growth. Based on this most recent forecast, ages 20-24 will continue to make up the largest share of Lane County's population (8%) while the share of the population over 80+ will also continue to grow (from 4% to 8%) by 2045. Housing needs associated with these bookends of the age spectrum will need attention during the future UGB analysis. Enrollment at the University of Oregon will continue to influence Eugene's population as well, as of November 2020 the University projected moderate growth in undergraduate enrollment of 2-2.5% until 2026 and stabilized enrollment levels after that.

Regarding who is moving to and from the area, Internal Revenue Service data shows that from 2011-2019 **Lane County experienced**

more in-migration from out-of-state residents (54%) (the most from California) **compared to in-migration from in-state residents (46%)**; the most in-migration from elsewhere in Oregon by county was from Multnomah County. Multnomah County also received the most outflow from Lane County compared to any other county. The **incomes of those migrating to Lane County from out of state were 93% higher than those migrating to Lane County from elsewhere in the state**.

(For more information, charts, and data sources on this topic, see:
Report Section VII: General or Overarching Metrics / Snapshot – Population Growth
Appendix C: General or Overarching Data, section General – How is Eugene's population growing?)

Demographics

Some of Eugene's demographics have not changed much during the monitoring period. According to the 2019 U.S. American Community Survey (ACS), the average household size remains similar to the Adopted Forecast of 2.24 persons per household. Eugene continues to have a higher percentage of non-family households (householder living alone or with unrelated people) compared to the rest of Lane County, most likely attributed to being a college town. Census data indicates that Eugene is slowly becoming more racially diverse, with a gradual increase in the population of communities of color.

(For more information, charts, and data sources on this topic, see:
Report Section VII: General or Overarching Metrics / Snapshot – Households and Demographics
Appendix C: General or Overarching Data, section Household Assumptions – Who lives in the community?)

Housing Costs

Over the monitoring period, **Eugene's median income increased 31% and median gross rent increased 32%**. Eugene's median sales price of single-family housing (detached and attached) has increased from $180,000 in 2012 to $395,000 in 2021, an increase of 119%.

In 2019, 41% of all Eugene households were housing cost-burdened, and 56% of renters were cost-burdened (defined as spending more than 30% of income on housing costs) with 30% of renters severely cost-burdened (defined as spending more than 50% of income on housing costs). These high percentages are reflected in analysis comparing 2019 ACS income and housing costs data, estimating that Eugene had a deficit of more than 10,000 dwellings that would be affordable to those making $25,000 or less.

Additionally, **the 2019 rate of vacant dwellings in Eugene was 3.6%**, much lower than the Adopted Forecast of 5% and **lower than a healthy vacancy rate (of about 7-8% for a rental market)**. This suggests that Eugene's housing market is very tight and there are limited

opportunities to find housing to meet various needs, especially for those community members in the lowest income brackets.

(For more information, charts, and data sources on this topic, see:
Report Section VII: General or Overarching Metrics / Snapshot – Household Assumptions
Appendix C: General or Overarching Data, section Household Assumptions –How affordable is the community?)

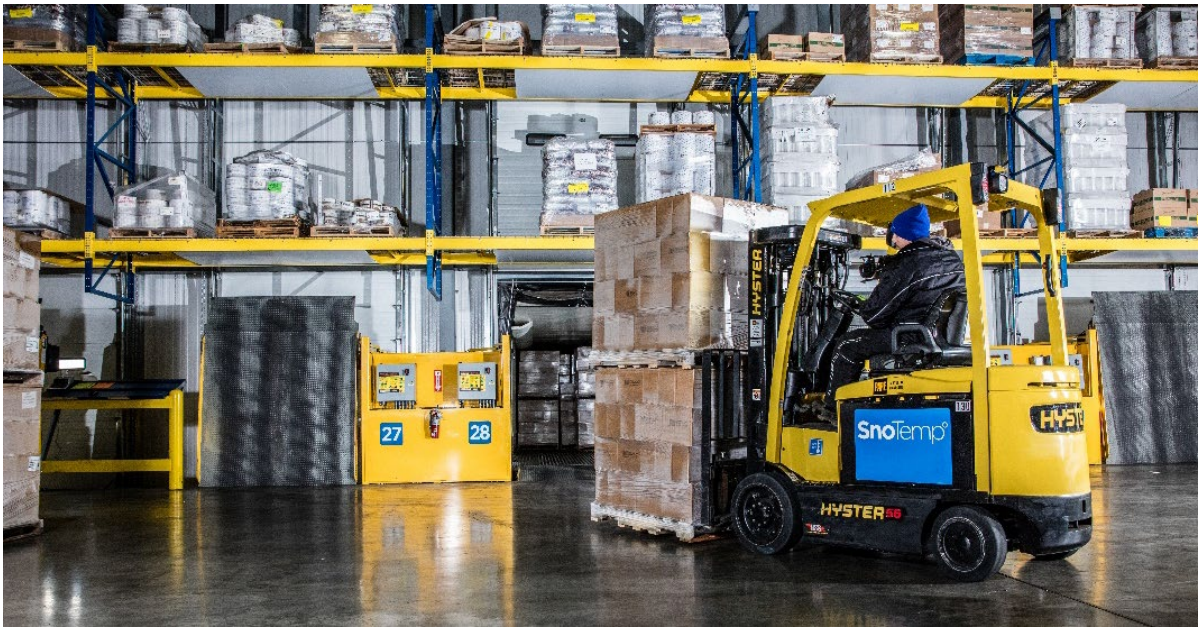


Photo provided by SnoTemp Cold Storage.

Job Growth

Eugene's employment industries have added 22,670 jobs[1] over the monitoring period through 2018 and Eugene **jobs have been growing significantly faster between 2012 and 2018 at 3.1% per year as compared to the adopted growth rate of 1.4%**. New jobs also outpaced population growth between 2012 and 2018. However, this rate is unlikely to be sustained for the entire 2012-2032 planning period because this high rate of growth occurred at the conclusion of a recession and a period of fast growth in the late 2010's. In fact, **the most recent Oregon Employment Department forecast for Lane County shows a slower projected growth rate of 1.4% for the next 10 years**, matching the currently Adopted Forecast rate of 1.4%. While the effects of the pandemic remain to be seen, a bright spot is that this recovery is faster than previous economic recoveries and by mid-2021, Lane County had already regained 51% of the

[1] These are the number of jobs covered by unemployment insurance within Eugene's urban growth boundary, as reported to the Oregon Employment Department, Quarterly Census of Employment and Wages (QCEW) data and calculated by Lane Council of Governments. The QCEW data is a quarterly count of employment and wages as reported by employers for workers covered by state unemployment insurance.

jobs lost at the onset of the COVID-19 pandemic. In terms of the types of jobs in Eugene, the percentage of jobs that are commercial non-retail, commercial retail, industrial or government in 2018 is at about the same mix as planned for in the Adopted Forecast (2012-2032).

(For more information, charts, and data sources on this topic, see:
Report Section VII: General or Overarching Metrics / Snapshot – Job Growth
Appendix C: General or Overarching Data, section Job Growth – How are Eugene's jobs growing?)

Wages/Pay/Poverty

Poverty Level

17%

(Eugene, 2019 American Community Survey)

The **average annual wage or pay of jobs in Lane County has risen by 19.4% over the monitoring period** (in dollars adjusted for inflation). This was less than the 22.9% increase experienced statewide over the same period. The increase in income overall correlates with the decrease in the proportion of the population earning below the federal poverty level, 17% as of 2019, down from nearly 28% in 2012. However, the United Way has developed a new way of defining and understanding the struggles of households that earn above the federal poverty level, but still not enough to afford a "bare-bones" household budget (e.g., housing, childcare, food, transportation, technology, and health care, plus taxes), called the ALICE (Asset Limited, Income Constrained, Employed) threshold. According to the ALICE report produced in 2018, 28% of Lane County households earned above the federal poverty level but still not enough to afford the ALICE bare-bones household budget. This means that **as of 2018, a total of 45% of Lane County households are either earning less than the federal poverty level, or above the poverty level but still less than needed to afford the ALICE bare-bones household budget**. The percent of Lane County households above the federal poverty level but below the ALICE threshold has not changed much over the last decade, maintaining at 26-28% of Lane County households since at least 2010. In addition, as another indicator of economic challenges, in 2017 54% of K-12 students in Lane County were eligible for free and reduced-price meals.

(For more information, charts, and data sources on this topic, see:
Report Section VII: General or Overarching Metrics / Snapshot – Household Assumptions

Appendix C: General or Overarching Data, section Household Assumptions – How affordable is the community?)

Development of Iris Place Affordable Housing. Photo provided by St. Vincent de Paul.

New Housing

More than 8,000 dwellings have been permitted over the monitoring period (December 2012-July 2021) in Eugene. In gross numbers, it appears that new housing has been keeping pace with the population growth over the monitoring period however, as noted in the caveats below, specific segments of housing are not matching the forecast demand. In total numbers, new housing development is on track to meet the adopted housing need of 15,105 new dwellings by 2032. However, **while the total number of dwellings is on track to meet the adopted need, specific housing types are not because much of the new housing production has been multi-family** (72% or 5,742 dwellings). In addition, of the new multi-family dwellings, 93% of the multi-family dwellings are in buildings with 5+ dwellings and almost 35% of the multi-family dwellings are identified as potentially student-oriented housing.

While multi-family housing in total has already exceeded the adopted need in total numbers, smaller multi-family housing types (e.g., duplexes, triplexes) and dwellings targeting the non-student population have developed well below the pace needed to meet the Adopted Forecast. Additionally, development of housing for lower density lands and single-family housing has been significantly slower and is not on track to meet the forecast need by 2032. The number of new larger multi-family structures is due in part to the **higher demand for multi-family housing near the University of Oregon.** The slower production of lower density lands and single-family housing is likely due in part to the large percentage of the **buildable Low Density Residential**

land supply not having services to be able to annex (40% of the remaining residential land supply is unannexed). In addition, **57% of the remaining buildable residential land supply is located on steeper lands** which can be more expensive to develop.

Several caveats: The adopted housing need only addresses the housing needed to accommodate projected 2012-2032 population growth. While the adopted multi-family need has been met, there are deficiencies in the housing supply that still need to be addressed. For instance, in June 2021 Lane County's Homeless By-Name List identified 2,506 active homeless individuals in Eugene (up from 1,109 in June 2019).[2] Given Eugene's rising housing costs and number of people actively experiencing homelessness, a housing deficit (or underproduction) likely existed before the monitoring period, especially for households with lower incomes. As such, higher housing production rates for housing affordable to these groups is necessary to address the previously existing deficit. As mentioned, although the projected multi-family housing need has been met, projections for the subset of smaller multi-family housing types (middle housing) have not been met. Further, housing development can be cyclical. Often single-family and multi-family housing types do not experience a boom at the same time. They often alternate, and currently the economic conditions are less favorable for development of single-family housing and more favorable for multi-family housing (whereas in the early 2000s it was reversed). It should also be noted that future planning efforts, such as the middle housing land use code amendments, will likely change the terminology for housing types used in this report which are from the 2012-2032 adopted UGB analysis (e.g., single-family detached, multi-family, etc.).

(For more information, charts, and data sources on this topic, see:
Report Section VIII: Housing Development Metrics / Snapshot – Housing Development General
Appendix D: Housing Development Data, section Housing Numbers and Housing Mix)

[2] https://public.tableau.com/app/profile/lchsd/viz/HomelessnessinLaneCountyOregon_16195399452050/IntroductiontoLaneCountysHomelessnessData , select Population Data.

Affordable Housing Landbank Site developed into Bascom Village.
Photo provided by St. Vincent de Paul.

Housing Development Incentives

The City offers incentives to develop more housing, known as housing "efficiency measures", for specific housing types and locations. Examples include tax exemptions for apartments downtown and for qualified low-income housing development, in addition to reduced permitting fees and land use code changes for downtown housing and for accessory dwellings. (See Appendix D: Housing Development Data for a complete list of incentives). Overall, 2,248 of the 8,011 new dwellings utilized efficiency measures (28%).

These incentives have been utilized the most by new multi-family housing, which is not surprising given the pace of multi-family development during the monitoring period. Total dwellings that utilized incentives are on track to meet the forecast need; however, most of this need has been met on land designated Commercial or High Density Residential whereas the dwellings utilizing efficiency measures has been much slower on Low Density Residential land. For instance, the programmatic approach for more housing Downtown has been more successful (although it is noted that the Multiple Unit Property Tax Exemption Program has been utilized less since it was revised in 2013[3]). In comparison, the main efficiency measure available for housing on Low Density Residential land was the re-designation of more than 170 acres of the Crow Road area in west Eugene from Medium Density Residential to Low Density Residential, and **development in the Crow Road area cannot be realized until the area is served with the utilities needed for annexation**. For housing on Medium Density Residential

[3] However, although too recent to be included at the time of this report, it is noted that the Downtown Riverfront MUPTE application for 381 dwellings was submitted at the end of 2021.

land, the main efficiency measure was changing the land use code to raise the minimum density required for development. The new minimum **density increase in the R-2 Zone has not been fully realized yet, partly because it has not been in effect for long,** so building is still occurring under older development approvals and partly because some R-2 land is not served with the utilities needed for annexation.

(For more information, charts, and data sources on this topic, see:
Report Section VIII: Housing Development Metrics / Snapshot – Housing Development: Efficiency Measures
Appendix D: Housing Development Data, section Housing Efficiency Measures)

Housing Land

Notably, there has been more new housing on certain land types than others for this point in the monitoring period. **Almost half of new housing was on land with a comprehensive plan designation of either Commercial or High Density Residential**, compared to only 32% on Low Density Residential land which is below the forecast pace. A larger percentage of new housing occurred on already developed land (41%) than forecast for the 20-year period (23%), exceeding the forecasts for redevelopment for all residential and commercial plan designations. **New housing has overwhelmingly been on flat land** (e.g., land with less than 5% slope) in all plan designations (92%).

New housing on Low Density Residential and High Density Residential land has been denser than the forecast, however because the methodology for calculating density in monitoring is different than that used for the forecast density it is difficult to fully compare the two. New housing on land categorized in the Buildable Lands Inventory (BLI) as Developed (e.g., already developed and assumed not to have room for more) was denser than new housing on land categorized as Vacant and Partially Vacant (e.g., Vacant land is generally undeveloped and Partially Vacant land has some development but room for more). This is likely because more than half of the new dwellings on Developed land were permitted on Commercial land, which was predominately developed with larger apartment buildings. In addition, land designated **Commercial has experienced the highest residential density** of all plan designations.

(For more information, charts, and data sources on this topic, see:
Report Section VIII: Housing Development Metrics / Snapshot – Housing Development Land Supply
Appendix D: Housing Development Data, section – Housing Development Details, Housing Development Buildable Lands Impact)

Employment Development and Incentives

Over the 2013-2021 monitoring period, there were 327 employment permits issued, an average of 37 employment permits per year. The City offers incentives to develop more employment buildings ("efficiency measures") for specific types and locations of commercial and industrial development. These include tax incentives, changes to the land use code adopted in 2014 to remove barriers for offices (e.g., the new E-1 Campus Employment Zone) and commercial uses (e.g., the new E-2 Mixed Use Employment Zone) on land designated Industrial, changes to the land use code adopted in July 2013 to remove barriers for employment development in downtown, and a brownfield assessment program (see Appendix E. Employment Development Data for a list of incentives). **Overall, incentives for employment development have not yet succeeded in spurring the additional employment development as intended**. This could in part be because there were higher building vacancies at the end of the 2007-2009 recession that have been re-populating during the monitoring period. It is noted that some employment efficiency measures have financial caps or other constraints. A total of 17 acres of employment development utilized employment incentives between 2013-2021, which accounted for only 6.2% of the total acres of employment development. The most utilized efficiency measure was the Enterprise Zone (12 acres), followed by employment development in the downtown area (4 acres) and then employment development in the E-1 Campus Industrial Zone (1 acre).

(For more information, charts, and data sources on this topic, see:
Report Section IX: Employment Development Metrics / Snapshot – Employment Development: Efficiency Measures
Appendix F: Employment Development Data, section Employment Building Permits from Efficiency Measures)

Employment Land

New employment development resulted in developing less land than anticipated, only 19% of the forecast, for this point in the monitoring period. **Land identified as Committed and Developed in the Buildable Lands Inventory experienced the most new employment development** (e.g., Committed land is generally devoted to public-type uses and Developed land generally has no undeveloped area for new development). Policies towards redevelopment and trends towards more on-line retail purchasing may have influenced the low amount of Commercial land developed. However, growth in retail and commercial non-retail jobs, including in businesses that need physical buildings, continued in Eugene through 2018 so it appears at least some of those needs are

being met. **No lots in Eugene's large lot industrial supply were developed** during the monitoring period, however, about half of the large-lot Industrial land supply (and a third of the total employment land supply) is in the Clear Lake UGB expansion area which is mostly not yet served with the utilities necessary for annexation and development and was not added to the UGB until a few years into the monitoring period (2017).

(For more information, charts, and data sources on this topic, see:
Report Section IX: Employment Development Metrics / Snapshot – Employment Development General, and Snapshot – Employment Development: Land Supply
Appendix F: Employment Development Data, section Employment Building Permits)

Updated Buildable Lands Supply

The Buildable Lands Inventory (BLI) model was rerun to get a snapshot of where the inventory of land is "today," essentially a monitoring snapshot of the BLI in 2021 including how much of Eugene's land supply is still developable (Vacant and Partially Vacant) and how much has been developed since the adopted BLI model was first run in 2012. Using the 2021 BLI and applying some key updated assumptions from the monitoring results (e.g., housing and employment densities to assume for developable land), the **2021 BLI results indicate a preliminary capacity on Vacant and Partially Vacant land for about 12,000 dwellings and about 18,700 jobs within Eugene's UGB as of January 2021** (not accounting for development that has happened since the 2021 BLI model was rerun in January 2021). In addition, analysis of the 2021 BLI also showed that:

- **40% (833 acres) of the Low and Medium Density Residential Vacant and Partially Vacant buildable land supply is unannexed**, which likely means that a large portion is not served with the utilities necessary to annex and realize the development potential.
- **63% of Industrial Vacant and Partially Vacant buildable land supply is unannexed**, including about 589 developable acres in the Clear Lake UGB expansion area which is mostly not served with utilities necessary to annex.
- **57% of the residential Vacant and Partially Vacant buildable land supply (44% of the capacity) is on land with 5% or greater slope**.
- **54% of the residential Vacant and Partially Vacant buildable land supply (59% of the capacity) is on lots less than 5 acres in size**.

(For more information, charts, and data sources on this topic, see:
Report Section XI: Buildable Lands Inventory Update Summary
Appendix I: Buildable Lands Inventory Update)

Updated Land Supply Compared to Updated Demand

For the purposes of monitoring, to get a high-level understanding of how Eugene's future demand may have changed for the next 20 years (2020-2040) compared to the adopted assumptions for 2012-2032, some of the key monitoring results were incorporated into the UGB land demand model while maintaining the majority of the other adopted assumptions (vacancy rate, housing mix). This produced a **preliminary updated estimate of demand for about 15,700 new dwellings and 24,800 new jobs for 2021-2041**.

Comparing the (preliminary) updated 2021 demand to the 2021 BLI Vacant and Partially Vacant capacity, if a new UGB analysis was started today *preliminary* estimates indicate **there would be a shortage of land in the UGB for housing (particularly on Medium Density Residential and High Density Residential land) and for jobs (particularly on Commercial land)**. However, these are high-level estimates that will be further refined during the next UGB analysis. **This preliminary estimate of demand for land and the capacity of land will change during the next UGB analysis** when accounting for additional land needs (e.g., parks and utilities), updating the remaining land demand assumptions (e.g., total job demand, housing mix) and updating land capacity assumptions (e.g., redevelopment). Additionally, the State's recent revisions to the housing needs analysis rules and the Climate-Friendly and Equitable Communities rule-making that is underway is likely to change transportation and housing planning during the next UGB analysis.

(For more information, charts, and data sources on this topic, see:
Report Section XI: Buildable Lands Inventory Update Summary
Appendix I: Buildable Lands Inventory Update)

III. Recommendations

Based on the findings of the comprehensive monitoring report[4] (which covers the first 8.5 years into the 20-year UGB planning period of 2012-2032), and technical review by the Envision Eugene Technical Advisory Committee, staff recommends that the Eugene City Council consider the following growth monitoring or planning-related actions. The program or process where the issue is most likely and/or most appropriate to be considered is noted in brackets.

Overall:

- **As part of the state-required housing capacity analysis for Eugene's urban growth boundary** (state mandated deadline of December 31, 2026 per HB 2003, adopted in 2019)**, consider whether to also complete an analysis for all other land needs (employment, government/public and infrastructure) within the UGB**. The outcome of the UGB analysis will determine if there is enough capacity within the UGB to address all land needs for the next 20-year planning period and expected population growth, and if the City needs to consider additional efficiency measures and/or urban growth boundary expansion to address any deficiencies. [Future UGB Analysis]

[4] Growth Monitoring is an ongoing program that includes ongoing data collection and regular reporting. This first report is a comprehensive report. After this first comprehensive report, reporting will be done on an annual basis and a comprehensive report done every five years thereafter or as needed, such as to align with the new state UGB and housing analysis requirements. See section V. Introduction for more information.

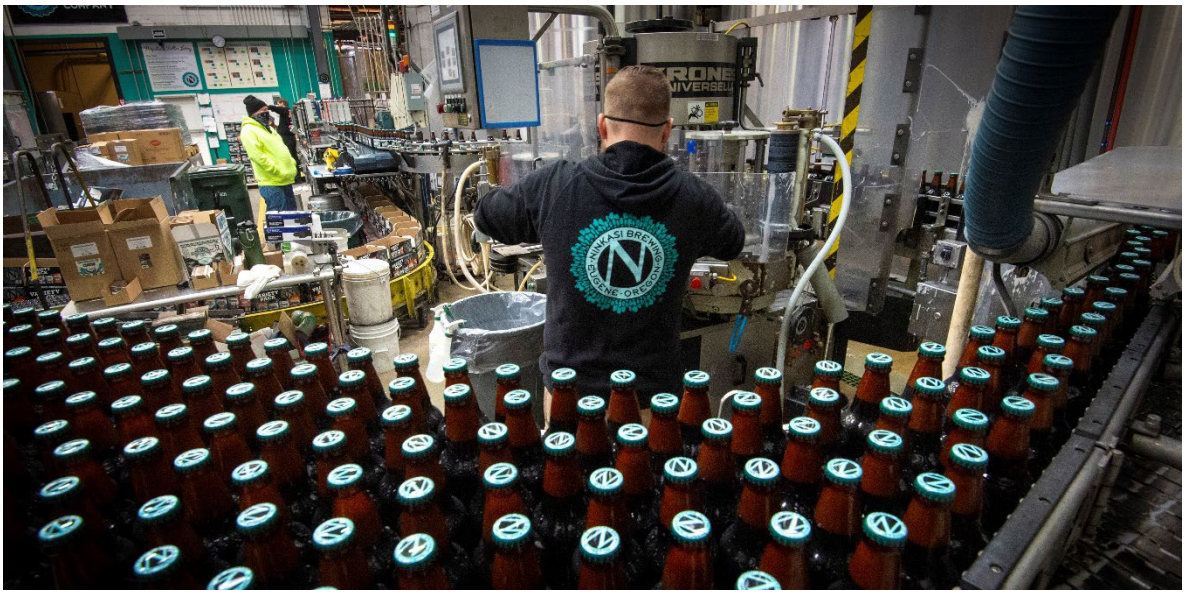
Sarang Apartments (Affordable Housing). Photo provided by Homes for Good.

Housing:

- Support the City's Housing Implementation Pipeline (HIP)[5] two and five-year goals related to overall housing supply to **address expected population growth and the existing shortage of dwellings, based on recent estimates regarding Eugene's historic underproduction of housing**. [Housing Implementation Pipeline and other future planning efforts]
    - **Particular attention should be on housing for households with low incomes**.
- Consistent with the action called for in the City's Housing Implementation Pipeline and the recommendation of the Eugene Planning Commission for the middle housing code amendments, **closely monitor the impacts of the land use code changes associated with implementation of House Bill 2001 (2019)**, which requires Eugene to allow middle housing types (duplexes, triplexes, fourplexes, townhouses and cottage clusters) in all residential areas. Examples include changes to the types and densities of new housing. The land use code changes will be effective no later than June 30, 2022. [Growth Monitoring]

[5] The Housing Implementation Pipeline, approved by City Council in January 2022, is an internal, cross-departmental, 5-year work plan for the City organization. This work plan coordinates current and future City resources, goals, and priorities with a systems-thinking approach to housing across the full continuum from people experiencing homelessness to overall housing supply. For more information see https://www.eugene-or.gov/4889/Housing-Implementation-Pipeline-HIP.

- Consistent with the action called for in the City's Housing Implementation Pipeline, **prioritize the extension of capital projects to provide services to undeveloped residential areas** within the UGB. [Capital Improvement Plans]
- Continue **monitoring the effectiveness of housing efficiency measures** to determine whether they meet their forecast needs. [Growth Monitoring]
    - If the need is not being met, **evaluate and adjust efficiency measures, including funding for such measures**, as part of the UGB analysis while recognizing that adding more housing supply at a variety of price points changes the housing market over time. [Future UGB Analysis]
- As part of the next UGB analysis, **explore new housing efficiency measures focused on housing for households with low to moderate incomes**. [Future UGB Analysis]
- As part of the next UGB analysis, **if student enrollment at the University of Oregon is significantly different than currently projected (either higher or lower), consider how future housing demand for both student and non-student populations will be impacted** in terms of the number, type and densities of new dwellings needed. [Future UGB Analysis]



Employee at Ninkasi Brewing Company.
Photo by Andrew Nelson.

Employment:

- Continue to **plan for infrastructure and service improvements and associated funding strategies for the Clear Lake UGB expansion area** for employment land. [Capital Improvement Plans]
- Continue **monitoring whether employment efficiency measures have been effective** to determine whether they meet their forecast need. [Growth Monitoring]

  - If the need is not being met, **evaluate and adjust efficiency measures, or consider other measures**, as part of the UGB analysis. [Future UGB Analysis]
- As part of the next UGB analysis, **explore whether employment is still growing and if the need for employment land is also growing, or if less land is needed, based on market changes**. [Future UGB Analysis]

See report section **XIV. Emerging Issues** for a list of items that will likely need to be addressed during future growth monitoring and other emerging items that would need additional analysis outside of the Growth Monitoring Program.

IV. Key Data Snapshot Comparison Table

Below is a snapshot comparison of the monitoring data discussed in the comprehensive report compared to previous estimates. Data is for Eugene unless otherwise noted. See Appendix J: Data Snapshot Comparison Table for more information and additional data comparisons.

General /Overarching Data: Population Growth

	Adopted* 2012-2032 Forecast < or > Start of monitoring period	Monitoring Data (total, average, or point in time)	Change
Planning Period	2012-2032*	2012-mid- 2021	n/a
	20 years - this does not change until a new UGB analysis is adopted	8.5 years - monitoring period	
Population Growth Rate	0.9%* (33,778 people)	1.2% (17,291 people)	**Higher**
	Extrapolated from 2009 PSU[1] forecast	2012-2021 PSU annual estimates	
Population Growth Rate Forecast	0.9%*	0.9%	**No/ Minimal Change**
	Extrapolated from 2009 PSU forecast	2020-2040 PSU forecast (2021)	

[1] PSU Portland State University

General /Overarching Data: Affordability

	Adopted* 2012-2032 Forecast < or > Start of monitoring period	Monitoring Data (total, average, or point in time)	Change
Median Household Income	$39,150	$51,269	**Up** (31%)
	2012 1-year ACS (not adjusted for inflation)	2019 1-year ACS (not adjusted for inflation)	
Median Sales Price by Housing Type	2012 RLID	2021 RLID	
Single-family detached	$205,000	$423,000	**Up** (106%)
Median Gross Rent	$831/month	$1,099/month	**Up** (32%)
	2012 1-year ACS	2019 1-year ACS	
Cost-Burdened Households	2012 1-year ACS	2019 1-year ACS	
All households	45%	41%	**Down**
Renter Households	60%	56%	**Down**
Owner Households	40%	25%	**Down**

Severely Cost-Burdened	2012 1-year ACS	2019 1-year ACS	
All households	26%	20%	**Down**
Renter Households	39%	30%	**Down**
Owner Households	13%	10%	**Down**

General /Overarching Data: Job Growth

	Adopted* 2012-2032 Forecast < or > Start of monitoring period	**Monitoring Data (total, average, or point in time)**	**Change**
Employment Growth Rate	1.4%*	3.1%	**Higher**
	Based on 2012-2022 OED[2] forecast *for Lane County* total jobs	2012-2018 OED covered jobs data	
Employment Growth Rate Forecast	1.4%*	1.4%	**No/ Minimal Change**
	2012-2022 OED forecast (2012) *for Lane County* total jobs	2020-2030 OED forecast (2020) *for Lane County* total jobs	
Unemployment Rate	9.1%	4.1%	**Down** (5.8% 2020)
	2011 US Bureau of Labor Statistics	2018 US Bureau of Labor Statistics	
Average Annual Wage or Pay	$41,456 (adjusted for inflation)	$49,503 (adjusted for inflation)	**Up**
	2012 OED for *Lane County*	2020 OED for *Lane County*	

[2] Oregon Employment Department

Housing Development

	Adopted* 2012-2032 Forecast < or > Start of monitoring period	**Monitoring Data (total, average, or point in time)**	**Change**
Number of New Dwellings	15,105*	8,011	**On pace**
		12/2012-mid-2021 issued building permits	
Mix of *New* Dwellings		12/2012- mid-2021 issued building permits	
Single-family detached	55% (8,308 dwellings)*	27% (2,191 dwellings)	**Below pace**

Single-family attached	8% (1,207 dwellings)*	1% (78 dwellings)	**Below pace**
Multi-family	37% (5,590 dwellings)*	72% (5,742 dwellings)	
2-4 dwellings	(1,814 dwellings)*	(412 dwellings)	**Below pace**
5+ dwellings	(3,776 dwellings)*	(5,330 dwellings)	**Forecast met**
Efficiency Measures		Various beginning dates	
Downtown (post 2013)	1,003 dwellings* Amount of additional dwellings above the average	679 dwellings 12/2012- mid-2021 issued building permits	**On pace**
R-2 Zone density change	566 dwellings* Amount of additional dwellings above the average	304 dwellings 2017- mid-2021 issued building permits	**On pace**
Re-designation to LDR	1,833 dwellings* Specific sites identified	71 dwellings 12/2012- mid-2021 issued building permits	**Below pace**
Affordable Housing Land Bank Sites	55 dwellings (MDR)* Specific sites identified	101 dwellings (MDR) 138 dwellings (LDR) 12/2012- mid-2021 issued building permits	**Forecast met**
Accessory Dwellings	84 dwellings* Amount of additional dwellings above the average	21 dwellings 7/2018- mid-2021 issued building permits	**Close to pace**
Land Developed for Housing		12/2012- mid-2021 issued building permits	
Low Density Residential Land	8,853 dwellings* (2,213 acres)	2,553 dwellings 391 acres 18% of forecast land capacity used	**Below pace**
Medium Density Residential Land	3,231 dwellings* (302 acres)	1,440 dwellings 77 acres 27% of forecast land capacity used	**On pace**
High Density Residential Land	1,223 dwellings* (57 acres)	1,413 dwellings 42 acres 73% of forecast land capacity used	**Above pace**
Commercial Land	1,877 dwellings* (87 acres)	2,314 dwellings 33 acres 38% of forecast land capacity used	**Above pace** (dwellings) **On pace** (acreage)

Employment Development

	Adopted* 2012-2032 Forecast < Or > Start of monitoring period	Monitoring Data (total, average, or point in time)	Change
Efficiency Measures		2013- mid-2021 issued building permits	
Downtown Programs	18 acres* Additional development above the average	4 acres	**Below pace**
E-1 Campus Employment Zone	48 acres* Additional commercial development	1 acre	**Below pace**
E-2 Mixed Use Employment Zone	54 acres* Additional commercial development	0 acres	**Below pace**
Re-designation to Commercial	8 acres* Specific site identified	0 acres	**No/ Minimal Change**
Brownfield Assessment Program	45 acres* Specific number of industrial acres identified	0 acres	**Below pace**
Land Developed for Employment Uses		2013- mid-2021 issued building permits	
Commercial land	256 acres*	60 acres 23% of forecast land capacity used	**Mixed**
Industrial land	1,148 acres*	118 acres 10% of forecast land capacity used	**Below pace**

V. Introduction / How to Use this Report

Why is Growth Monitoring Important?

The urgency to create the Growth Monitoring Program grew from a series of important questions during the Envision Eugene process related to providing housing and jobs for a growing population. Most of these involved "quantitative" data, or information that can clearly be shown using numbers. For example, is Eugene growing quicker than anticipated? Is land developing faster than expected? Are housing prices increasing faster than incomes? Is the average wage increasing or decreasing, and are businesses expanding or leaving the community? Other questions are related to "qualitative" data which is more subjective and related to the experience of Eugene's residents such as, has there been improved access to shops and services in 20-minute neighborhoods? Establishing a robust monitoring program not only follows the Envision Eugene commitment to the community and to Council direction, it also provides more accurate data that will be accessible to the entire community, including City Council. This approach allows the community and Council to focus on important conversations about strategies for accommodating growth, rather than about the quality of the underlying data. Importantly, having a better system for collecting, tracking, and reporting data also allows Eugene to be in a better position to address changing trends and unforeseen circumstances.

Background

The Envision Eugene Recommendation (2012) was developed as part of an effort to form the vision and framework for a 20-year plan to accommodate Eugene's growth and adopt a new urban growth boundary (UGB). The Envision Eugene pillar on adaptable, flexible and collaborative implementation provides the impetus and foundation for the Growth Monitoring

Program and this report. It includes strategies calling for the creation of an ongoing monitoring system to collect and track information related to assumptions made during the UGB analysis about the next 20 years of growth (2012-2032), as well as measure success in achieving relevant community goals.

As part of the Envision Eugene process, in July 2015, the Eugene City Council established a target date for staff to deliver the first monitoring report within three years of the State's acknowledgement of the new UGB. The Council also formalized this direction by adopting the new Envision Eugene Comprehensive Plan with policies establishing the Growth Monitoring Program, as part of the UGB adoption process. Council recognized that monitoring development and growth trends to determine if they are different compared to the assumptions made at the time of UGB adoption will help inform whether the agreed upon growth management strategies need to adjust. The data will help inform policy decisions and make regular reporting more efficient. The report may flag trends that might be different than expected; however, the monitoring data does not necessarily explain *why* trends are different than expected. Instead, the reports can be used to flag when additional analysis is needed in a certain area, such as a housing market study or a redevelopment analysis.

Since this work started, the Oregon State Legislature adopted new law in 2019 (House Bill 2003) that requires Eugene to analyze its UGB for housing needs and adopt a new housing capacity study every eight years. Eugene's first deadline for adoption of a housing capacity analysis is December 31, 2026. The Growth Monitoring Program and reports aim to help keep a pulse on trends and growth as intended, as well as help make that regular analysis more efficient.

To establish the Growth Monitoring Program, a cross-departmental staff team started with setting up a system to collect and report on the types of data and metrics used to meet state UGB analysis requirements, building the system so it could be added onto as needs change and other data becomes important to include. However, just doing what is needed to meet UGB analysis rules has taken significant time. Although additional important data has been identified since this work began, not all of the additional information has been able to be incorporated. These reports and the program will need to evolve over time.

Additional data needs will need to be evaluated for applicability and incorporated into the program as it evolves. Staff time and resources are a limiting factor on how much can be added.

Report Layout

The report provides different layers of information, depending on the reader's level of interest. The **Executive Summary** is higher level and pulls all the pieces together into a synopsis. The **Key Questions** and **Snapshots** in this report give a slightly more detailed but still high-level summary about topic areas and include key data and figures. For those wanting a deeper dive, the **Appendices** include many more charts and details about data sources, definitions, the relationship of the data to the UGB analysis, and chart takeaway summaries.

This first report is a comprehensive report. After this first comprehensive report, reporting will be done on an annual basis and a comprehensive report done every five years thereafter or as needed, such as to align with the new state UGB and housing analysis requirements. An annual report is focused on key data, comparing year to year. A comprehensive report like this one looks at a fuller picture/context and includes more data, more comparisons of Eugene to other jurisdictions, more years of comparisons, etc. A comprehensive report also includes recommendations and conclusions that are less likely to be found in an annual report.

So, About the Data...

The **adopted assumptions and forecasts referenced in this report are for the time period of 2012-2032**, which aligns with the 20-year planning period used for the most recently adopted UGB (also referred to as the original UGB analysis). **Being only part way into the monitoring period (over 8 years by mid-2021), a data point that is significantly different than the forecast**

does not necessarily mean the original assumptions were wrong. For instance, it could be that Eugene is just in a faster or slower growing portion of the 20 years and that the average over 20 years will even out. Another example is that some data is collected differently now than it was during the UGB analysis, providing a different result that does not necessarily mean the original assumption was wrong. Determining whether the data means a changing trend or not is challenging. Often, it's better to look at a longer length of time than the monitoring period has been so far because even at over eight years, the monitoring period is somewhat short in terms of population growth, economic cycles, and development trends.

The **monitoring period for this report is 2012-2021**, which is the beginning of the planning period (2012) through the writing of this report (mid-2021). However, the monitoring period sometimes references a slightly different time frame because of the differences in the availability of data. For instance, Eugene's job data is currently only available through 2018 (due to additional processing requirements of county data) so the monitoring data for Eugene's jobs is 2012-2018. Figure 1 shows the most common data source and the years that the monitoring data was collected for each main monitoring topic area.

Figure 1. Data Source and Collection Years for Monitoring Data Topics

Data Topic	Source	Monitoring Data Collection Years
Population Estimates & Forecast	**Portland State University Population Research Center**	**2012-2021**
Migration Trends	**Internal Revenue Service, Statistics of Income**	**2011-2019**
Household Demographics	**U.S. Census Bureau, American Community Survey (1-year or 5-year) and the Decennial Census[6]**	**2012-2019**
Housing Affordability	**U.S. Census Bureau, American Community Survey (1-year or 5-year)**	**2012-2019**
	Lane County Assessment and Taxation, Regional Land Information Database	**2012-2021**
	Redfin.com	**2016-2021**
	Zillow.com	**2019**

[6] Data from the U.S. Census is the most comprehensive data available for these data topics, but it should be recognized that this data is missing people that do not feel comfortable responding or identifying with the specific census categories.

Jobs	**Oregon Employment Department, Quarterly Census of Employment and Wages**	**2016-2018** (Eugene) **2016-2020** (Lane County)
Jobs Forecast	**Oregon Employment Department**	**2021**
Unemployment Rate	**U.S. Bureau of Labor Statistics, Local Area Unemployment Statistics**	**2012-2021**
Annual Wages/Pay	**U.S. Bureau of Labor Statistics, Local Area Unemployment Statistics**	**2016-2018** (Eugene) **2012-2020** (Lane County, OR)
Housing Development and Efficiency Measures	**City of Eugene Planning and Development Department**	**late 2012-mid 2021**
Employment Development and Efficiency Measures	**City of Eugene Planning and Development Department**	**2013-mid 2021**
Land Use Applications	**City of Eugene Planning and Development Department**	**2012-mid 2021**
2021 BLI Monitoring Snapshot	**various sources, see Appendix I**	**January 2021**

In most cases, the monitoring data is compared to data at the beginning of the monitoring period or right before (2012 or 2011). In a few cases, some of the data being compared is older than the beginning of the monitoring period (2012) because that was the best available data at the time of the previous UGB analysis. For example, race and ethnicity data is often collected from and compared to data in the Decennial Census (2000 and 2010).

Most of the data being collected is from the same source and collected the same way as it was for the adopted assumptions in the original UGB analysis, such as U.S. Census data. However, some data is being collected differently with the intent to have better data than what was used during the previous UGB analysis. For instance, new software allows for the collection of more building permit data that was not readily available at the time of the previous UGB analysis. It is clear in the report if the data is collected differently than how it was collected for the adopted UGB analysis.

The U.S. Census is one of the primary data sources for this report. Some data is provided through the annual American Community Survey (ACS) and some only through the Decennial Census, which occurs every 10 years, the latest in 2020. The ACS is a survey of a *sample* of households collected continuously over the year and aggregates the results over a specific time, either one year or five years. The one-year ACS provides the most recent data for Eugene households and because of that specificity makes the most sense to use for yearly monitoring. When comparing Eugene to smaller cities, the five-year ACS is used for all jurisdictions (including Eugene) because data is only compiled for the smaller cities in the five-year ACS format.

"Not everything that can be counted counts, and not everything that counts can be counted.

-William Bruce Cameron

Finally, it is important to recognize that creating an on-going monitoring program is complex and challenging and that the results will not be without issues or mistakes. For example, the data collected for this report varies in the type, format, availability, and source of the data, including U.S. Census data, state jobs and population data, and local housing costs and building permit data (see Appendix B: Collection and Monitoring System for more information). Automating data collection and reporting can generalize results that introduces new issues or misses complexities that a full manual analysis might not have. Automated processes also require some concessions on detail or total accuracy in order to limit the increase on staff's time for data entry, to have a reporting system that creates consistent results every time over the years, and to avoid creating specialized one-off analysis which takes more staff time. A lot of the data still requires manual input which is not without human error. The data and results will also still be technical and not always easy to simplify or explain or feel accessible. The program may not provide all the answers needed or wanted to make decisions about Eugene's growth management. Nonetheless, the program will be a significant improvement over collecting data all at once through a manual look-back method like was done in Envision Eugene. Having better data will not necessarily make growth decisions easier, but it can provide the community and decision makers with better information to increase confidence in making those decisions.

COVID-19 Pandemic

An important caveat to this report is that the short- and long-term effects of the COVID-19 pandemic remain to be vetted and understood. For instance, more recently there have been disruptions to the materials supply chain and labor market potentially related to the COVID-19 pandemic that could be impacting recent development trends. In addition, if more workers

continue working from home than in the past, existing and new spaces for employment and future housing needs may be affected. While the monitoring period for this report is 2012-2021, it must be recognized that much (but not all) of the data and comparisons presented in this report are from before 2020 and the impacts of the pandemic are not captured in this report (some data is from 2020, but generally impacts are not captured). However, information about the effects of the COVD-19 pandemic is noted if appropriate and available. As was intended by Envision Eugene Pillar 7, regularly checking job and development trends puts Eugene in a better position to respond to unforeseen impacts like the pandemic.

VI. Overview of Collection and Reporting System

The Growth Monitoring Program is intended to provide the information needed by the community and decision makers to periodically assess the validity of assumptions and evaluate the effectiveness of goals and policies adopted as part of Eugene's comprehensive plan. Specifically, the Growth Monitoring Program establishes a framework for the City to collect, report and analyze data related to growth trends (e.g., how dense is new housing, how much vacant land has been developed, how affordable is housing) and then assess whether some sort of action is needed if the trends or needs are different than anticipated (e.g., if Vacant land is being developed quicker than expected, if population is growing faster than expected). The earlier draft Growth Monitoring Program Framework provides detailed information about the program structure and was informed by input from key partner groups and agencies, research from other jurisdictions, and ongoing refinement of the data collection list and data collection systems.

Creating this new collection and reporting system, including the replacement and re-organization of decades-old systems, is a significant investment with technical challenges that require expertise from across the organization including Planning, Information Services, Building and Permit Services, and Community Development, as well as from consultants. Data results and analysis are reviewed by the Envision Eugene Technical Advisory Committee (EETAC), a group of appointed volunteers comprised of technical experts, community members, and representatives from City Council and Commissions. The group represents a range of voices in the community and provides feedback to staff on technical-related issues and monitoring reports. The monitoring report recommendations are considered by the Planning Commission and forwarded to City Council for consideration and possible direction.

The focus to date has been setting up the program, developing the quantitative collection and reporting systems, establishing the EETAC as an instrumental part of the program, and developing the first report. The EETAC has completed their first regular cycle of monitoring data review and input and provided substantial feedback for this report. Future program work includes addressing remaining quantitative analysis, developing an interactive community dashboard to report monitoring data, and developing a qualitative assessment of how Eugene is growing.

Tips on Reading Data Charts and Graphs

Here are a few helpful tips to keep in mind while reading the charts and graphs throughout the report:

- The legends on the bar charts read from left to right and match the order of the bar categories from bottom to top.
- Typically, the charts and graphs using an **orange color spectrum** are associated with people, housing costs, or housing building development data, while charts and graphs using a **blue color spectrum** are associated with jobs or employment building development data.
- Typically, the charts and graphs using a **grey color spectrum** are associated with jurisdictions other than Eugene (e.g., Lane County, Oregon). The grey color spectrum can also represent acres of land developed.
- Typically, bars that are filled in with a color represent actual data while bars that are outlined but not filled with color represent forecast or trend data.
- Some charts include a grey shaded box around part of the chart, representing historical data before the monitoring period started in 2012.

As an example, the *Employment Permits by Subcategory* chart to the right uses a blue color spectrum because the data is associated with employment development. The first category in the legend, “Commercial Non-Retail" is the category shown at the bottom of each bar. The second category in the legend, “Commercial-Retail” is the category shown second from the bottom of each bar, etc.

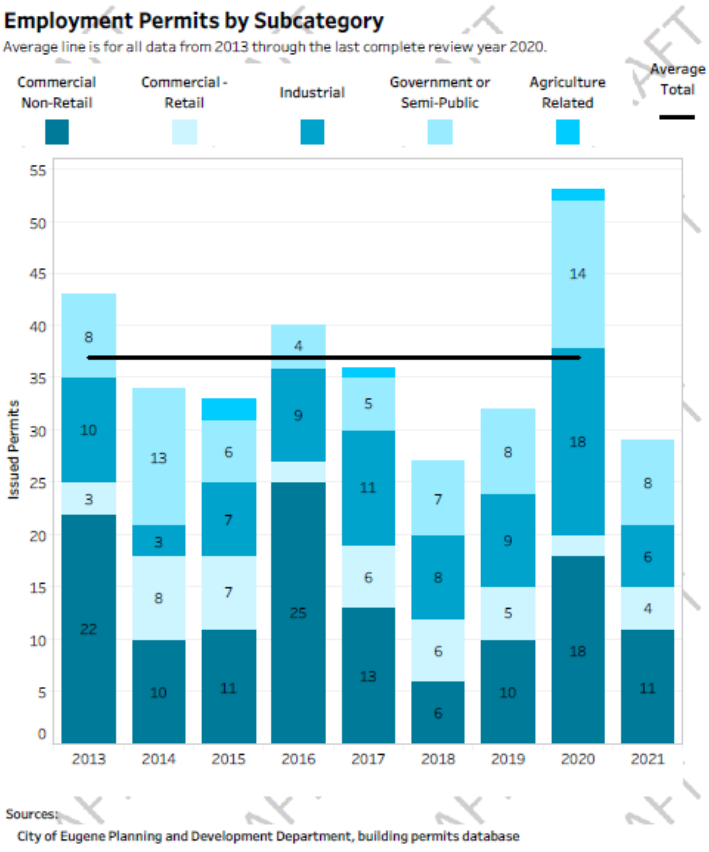


Photo by City of Eugene staff.

VII. General Metrics

Each topic area has a list of key questions, sub-questions, and relevant key indicators or data to help answer those questions. The questions relate to the assumptions and forecasts that were adopted or anticipated during the previous UGB analysis, providing context for why each piece of data is monitored, and the key indicators are the data needed to help address the question. The following are questions and key indicators related to the overarching topics of population growth, household demographics, and job growth.

Key Questions – Population Growth, Households, Job Growth

General / Overarching Data

KEY QUESTIONS	SUB-QUESTIONS	KEY INDICATORS
Are actual population estimates in line with the 20-year population forecast?	• Is there a new official Portland State University (PSU) population forecast for Eugene? • Has the University of Oregon revised its growth estimates?	• PSU annual population estimate • New population forecast • University of Oregon enrollment growth projections
Are household characteristics consistent with what was anticipated?	• Have household characteristics or demographics changed? • Have housing costs changed? • Where are people living and working?	• Household size • Persons in group quarters • Cost burden (those spending more than 30% of their income on housing) • Rent and mortgage costs • Other Census or jobs data*
Is the actual job growth rate in line with what was anticipated?	• Is there a new Lane County employment forecast?	• Employment growth forecast • Number of jobs by employment sector

*Vacancy rate, tenure, housing (mix) type of existing stock, race/ethnicity, head of household, age of household, household composition, housing costs, household income, average pay/wage, population in poverty

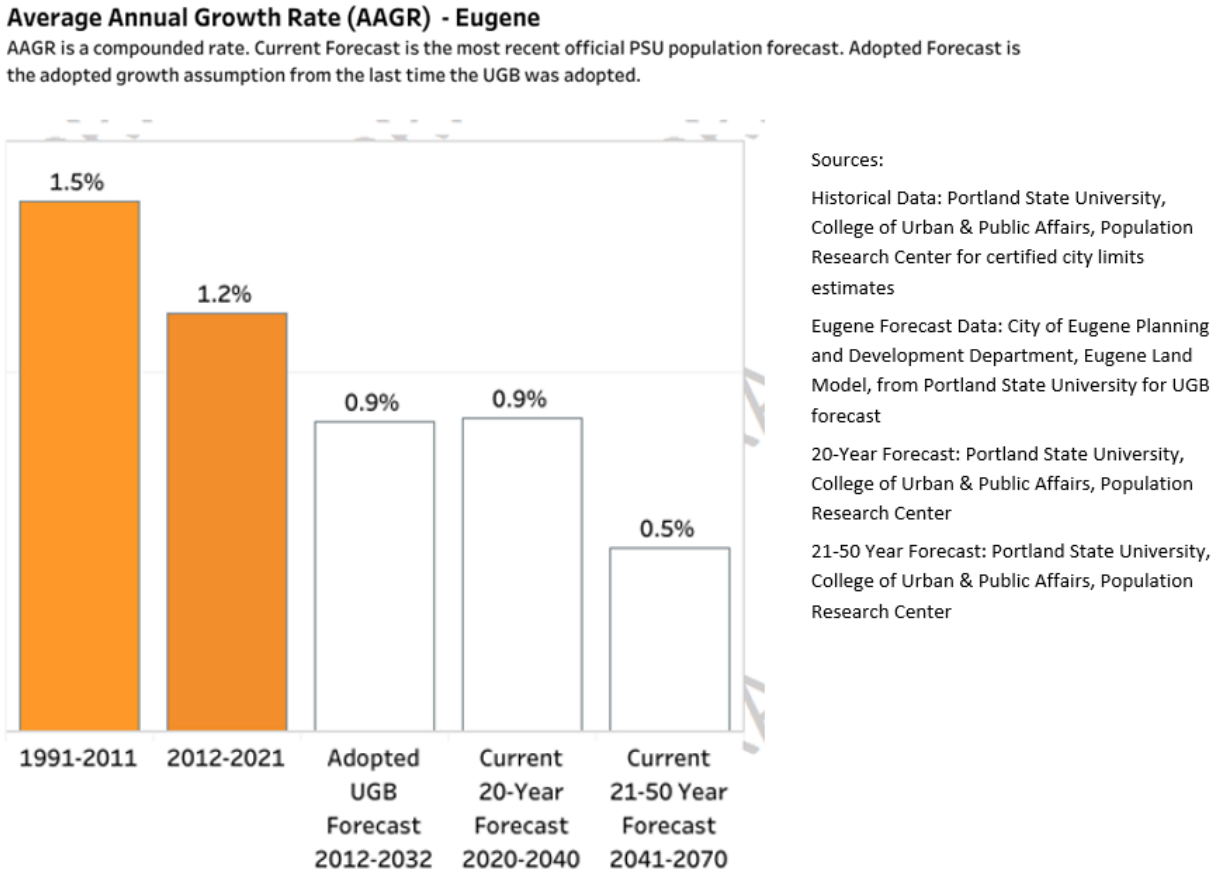
Snapshot – Population Growth – How is Eugene's population growing?

Is Eugene's population growing at the pace anticipated?

State law requires that Portland State University (PSU) provide Oregon counties and cities with population forecasts and that jurisdictions use these forecasts for the purposes of state-required land use planning (see Oregon Revised Statutes 195.033). PSU also provides annual certified population estimates for cities, counties and the state. According to PSU's 2021 certified population estimate, Eugene has added 17,291 people in the city limits since 2012 for a total of 175,626 people. Eugene grew faster over the 2012-2021 period (1.2% population growth rate) than the Adopted Forecast 2012-2032 period (0.9%) (Figure 2). The most recent PSU population forecast (June 2021)[7] projects growth for the next 20-year period of 2020-2040 to be slower than recent years at 0.9% (but the same rate as Eugene's Adopted Forecast), and that the population growth rate will continue to decrease over the long term to about 0.5% for 2045-2070 (although the further out the forecast the less certain). Population forecasting is complex, and any forecasting has uncertainties; however, this is the best data available and regular forecasting from PSU every four years allows for improved and up-to-date forecasts.

[7] https://www.pdx.edu/population-research/population-research/sites/g/files/znldhr3261/files/2021-08/Final_Report_Lane_Corrected.pdf, June 30, 2021

Figure 2



At the county level (Eugene makes up about half of Lane County's population) PSU expects the region to grow but not as fast as previous decades. Fertility rates are expected to keep declining and older populations will continue to grow, particularly the 80 years and older category. Deaths are expected to outpace births by 2027, which means there would be a natural decrease in the population. However, because the number of people migrating into Lane County is still more than the natural decrease in the population, the total county population is still expected to grow, just at a slower rate than previous decades.[8]

Regarding who is moving to and from the area, Internal Revenue Service data shows that from 2011-2019 Lane County had more in-migration from out-of-state residents (63%) (predominately California), compared to in-migration from in-state residents (37%). The most

[8] Regarding climate change, PSU states in part that "climate change... risks have not been incorporated into the population projections, except to the extent that they are reflected in population dynamics ... Sequelae of climate change are currently not included in our forecasts due to uncertainty regarding the effect, extent, and timing of such changes here in Oregon." Methods and Data for Developing Coordinated Population Forecasts, June 2021.

in-migration from elsewhere in Oregon was from Multnomah County.[9] The highest outflow of residents from Lane county to another county was also to Multnomah County. The incomes of those migrating to Lane County from out of state were 93% higher than those migrating from elsewhere in Oregon. Regarding potential growth in students, as of November 2020 the University of Oregon anticipated moderate growth (2.0% to 2.5% per year) in undergraduate student enrollment until 2026, and stabilized enrollment levels after that, with graduate student enrollment growth expected to increase very slowly. The fall 2021 freshman class is the largest the University has ever had (more than 4,600 entering students). The total enrollment for the 2021-2022 school year is approximately 21,800.

How is Eugene growing and anticipated to grow compared to nearby cities?

According to the latest PSU forecast (June 2021), over the 2020-2040 period Eugene is expected to add 36,744 people to Eugene's UGB at a growth rate of 0.9%. Over the same period, the two largest nearby communities, Springfield and Cottage Grove are projected to grow slower than Eugene adding 5,705 people at 0.4% and 714 people at 0.3%, respectively within their UGBs. In comparison, over the same period, the rest of the nearby cities (Creswell, Junction City, Oakridge and Veneta) are projected to grow at the same or faster rate (0.9-1.75%) than Eugene but are adding a significantly smaller number of people than Eugene.

Compared to the growth in recent years (2010-2021), over the next 20 years (2020-2040) Eugene and nearby cities are projected to grow about the same or slower than they have been, with the exception of Creswell and Oakridge which are projected to grow faster than they have in recent years. While this will result in some smaller communities increasing their share of the county population in the future, Eugene is projected to continue to account for most of the county's population (even increasing slightly in share) through 2070.

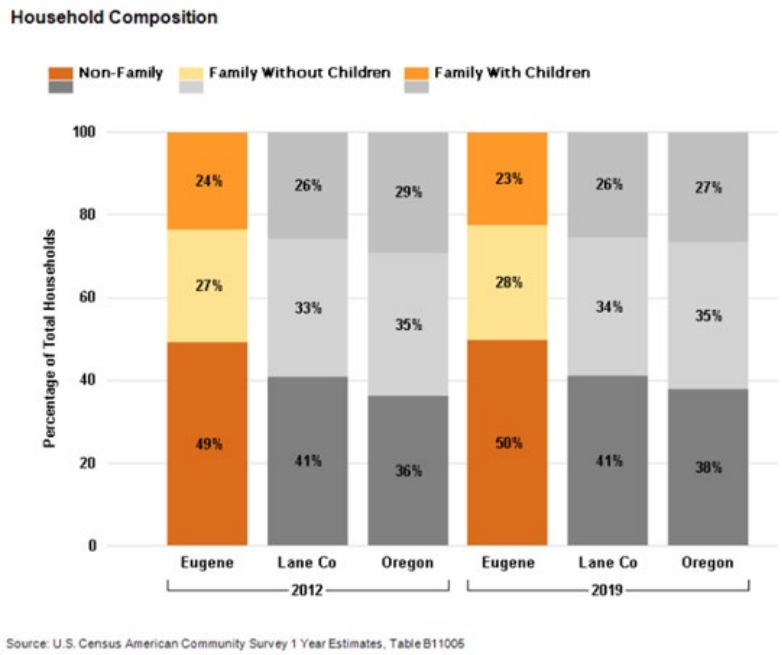
(For more information and data sources on this topic section, see:
Appendix C: General or Overarching Data section General – How is Eugene's population growing?)

Snapshot – Households and Demographics – Who lives in the community?

Have household characteristics or demographics changed in recent years?

[9] https://www.irs.gov/statistics/soi-tax-stats-migration-data, August 27, 2021

Figure 3



Source: U.S. Census American Community Survey 1 Year Estimates, Table B11005

There were no significant shifts in the average size of Eugene households throughout the monitoring period. The 2032 Adopted Forecast for average household size is 2.24 persons per household and in 2019 the average was 2.27. The highest average during the monitoring period was in 2014 at 2.39. Comparing the change between the 2010 and 2020 Census will provide more definitive information about long-term change in average household size, but there are no significant changes to report from the most recent ACS data.

Eugene's household composition, categorized into non-families, families without children, or families with children, also stayed consistent throughout the monitoring period. As shown in Figure 3, household composition continues to be split almost equally, with families and non-families each making up about half of the total households in Eugene. When compared with the household composition in Oregon and even in Lane County, Eugene has a higher percentage of non-family households, most likely attributed to Eugene's status as a college town resulting in a larger number of non-family student households.

Eugene's population has slowly become more racially diverse. The 2000 Decennial Census data reported that Eugene's composition was 86% white non-Hispanic, 9% all other races, and 5% Hispanic or Latino/a/x and the 2010 Decennial Census reported Eugene's composition was 82% white non-Hispanic, 10% all other races, and 8% Hispanic or Latino/a/x (a more detailed breakdown of ethnicity and race is in Appendix C: General or Overarching Data section Household Assumptions – Who lives in the community?). There was no significant change in composition in this ten-year period. In 2019, the ACS data shows that white non-Hispanic people made up 78% of the population, all other races made up 12% and Hispanic or Latino/a/x

made up 10%, showing a slow increase in diversity.[10] Eugene has experienced an increase in diversity during the monitoring period, but comparing the change between the 2000, 2010 and 2020 Census, when this data from the 2020 Census is released,[11] will provide more definitive information about long-term change in the racial composition of Eugene.

How many people are living in group quarters?

People living in group quarters includes people living in housing that does not consume standard dwellings, including jails, dormitories, and nursing homes/assisted care facilities.[12] The percentage of people living in group quarters was forecast at 5%, which was a projection for the number of people in group quarters to increase slightly over the 2012-2032 planning period from the 4.6% of the population in group quarters in 2012. The percentage of the population living in group quarters in 2019 (3.8%) is lower than at the beginning of the 2012-2019 monitoring period (4.6%), the 2000 Decennial Census (4.4%) and the 2010 Decennial Census (4.6%) but has slightly increased since 2018 (3.5%). This slight trend downward during the 2012-2019 monitoring period is not necessarily a trend that may continue. For example, the most recent population forecast (2021) anticipates the 80+ age population doubling in Lane County by 2045; as the population ages, the percentage of people in nursing homes/assisted care facilities may go up and there may be a need to plan for more group quarters than in the past. Recent building permit data includes several nursing homes/assisted care facilities and University of Oregon dormitory projects which may increase the percentage of people that report living in group quarters in the next ACS. The data about people living in group quarters is one of many land demand assumptions that help determine the demand and capacity for land.

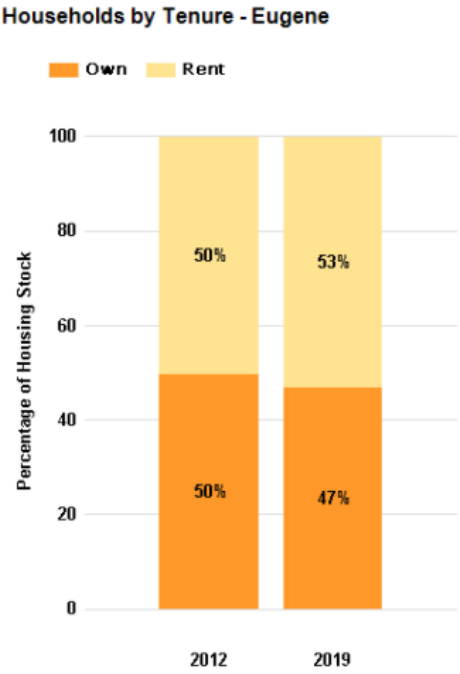
(For more information and data sources on this topic section, see:
Appendix C: General or Overarching Data, section Household Assumptions, including more detailed information on group quarters.)

[10] It should be noted that the margin of error for the ACS data is high for this data set, partially because it is only based on a sample of households.
[11] As of the writing of this report, the full 2020 Decennial Census data for Eugene had not been published.
[12] The U.S. Census Bureau defines group quarters as: "A group quarters is a place where people live or stay other than the usual house, apartment, or mobile home. Two general types of group quarters are recognized: institutional (for example, nursing homes, mental hospitals or wards, hospitals or wards for chronically ill patients, hospices, and prison wards) and noninstitutional (for example, college or university dormitories, military barracks, group homes, shelters, missions, and flophouses). Group quarters may have housing units on the premises for staff or guests." https://www.census.gov/programs-surveys/popest/about/glossary/housing.html

Do people rent or own their households?

Not only is Eugene home to the University of Oregon, but it also is home to Bushnell University, New Hope Christian College and Lane Community College's downtown campus. Due to the large number of students, Eugene has a relatively high percentage of non-family households that also tend to be renter occupied households. As shown in Figure 4, the proportion of owner and renter occupied households has stayed constant over the 2012-2019 monitoring period at about a half and half split, with ownership slightly decreasing over the last few years. Whether a household is rented or owned may be influenced by its housing type. In Eugene, single-family detached housing has a high percentage of ownership (78% in 2019), while single-family attached (37%), multi-family with 2-4 dwellings (2%) and multi-family with 5+ dwellings (3%) have lower percentages of ownership and tend to be occupied by renter households. Generally, the proportion of households that rent compared to own by housing type has stayed about the same over the 2012-2019 monitoring period.

Figure 4

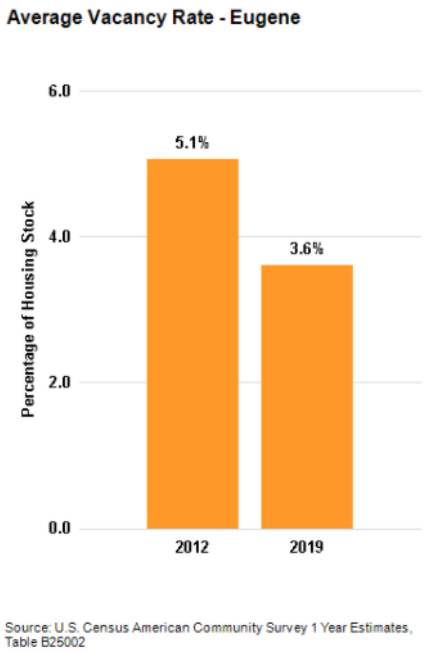


Source: U.S. Census American Community Survey 1 Year Estimates, Table B25032

Are dwellings available?

Vacancy rate is the proportion of existing dwellings, both single-family and multi-family, that are vacant at the time of a survey. Dwellings can be vacant for several reasons such as it is part of a recent sale and the owner has not moved in yet, a renter is moving between units, a unit has not been rented yet, or vacant recreational or seasonal rentals.

Figure 5



Source: U.S. Census American Community Survey 1 Year Estimates, Table B25002

As show in Figure 5, in 2019 Eugene's vacancy rate hit a low for the monitoring period with an average vacancy rate of 3.6%. A rental vacancy rate of 7% to 8% is considered to indicate a healthy housing market. Rates below 5% are extremely tight and will begin to price out even those households that are earning a median household wage. A housing supply that does not have enough vacant dwellings to allow movement between units can have higher housing costs (it does not mean that vacant dwellings are exacerbating housing supply or affordability issues). The lower vacancy rates in the past few years are consistent with what local appraisers and realtors have anecdotally reported, that the number of vacant and available dwellings in the community has decreased, resulting in a tight rental and home buying market.

Vacancy rates are cyclical and represent the lag between the housing demand and the market's response to that demand by producing additional dwellings. It is important that any long-term land supply account for and provide a certain amount of the future supply to be vacant to allow for that movement between units.

(For more information and data sources on this topic section, see:
Appendix C: General or Overarching Data, section Household Assumptions)

Snapshot - Households Assumptions - How affordable is the community?

As discussed in more detail below, both incomes and housing costs in Eugene have risen over the monitoring period, with housing costs rising faster. From 2012 to 2019 median household incomes have increased 31% while median gross rent has increased 32%. According to estimates from Lane County Assessment and Taxation data,[13] from 2012 to 2021, the median sales price of single-family housing (detached and attached) has increased 119%, increasing 17.6% from 2020 to 2021 alone. While there was a slight decrease in cost-burdened households over the monitoring period, in 2019, 41% of all Eugene households were cost-

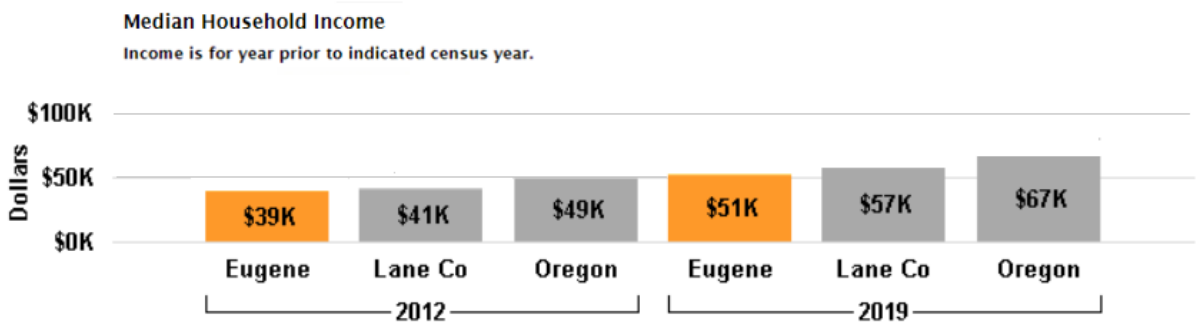
[13] Lane County Assessment and Taxation's housing sales data is from the Regional Land Information Database (RLID).

burdened and 20% were severely cost-burdened.[14] It is recognized that cost burden is not a perfect measure, for example, senior households may pay a greater proportion of income on housing costs than non-senior households because they have fewer demands on their income and student households may have a higher cost burden since their income is lower while in school. However, it still signifies a significant housing affordability issue.

How have income and poverty levels changed?

The median household income in Eugene increased over the monitoring period after taking a dip between 2000 and 2010, when many jobs and households nationally were impacted by the 2007-2009 recession. As shown in Figure 6, at the beginning of the monitoring period in 2012, the median household in Eugene had an income of $39,000 compared to the median in 2019 at $51,000 (not adjusted for inflation), an increase of 31% between 2012 and 2019. Increasing incomes can be an effective means of reducing the number of households that are housing cost-burdened.

Figure 6



Sources:

U.S. Census American Community Survey 1 Year Estimates, Tables B25070/B25091

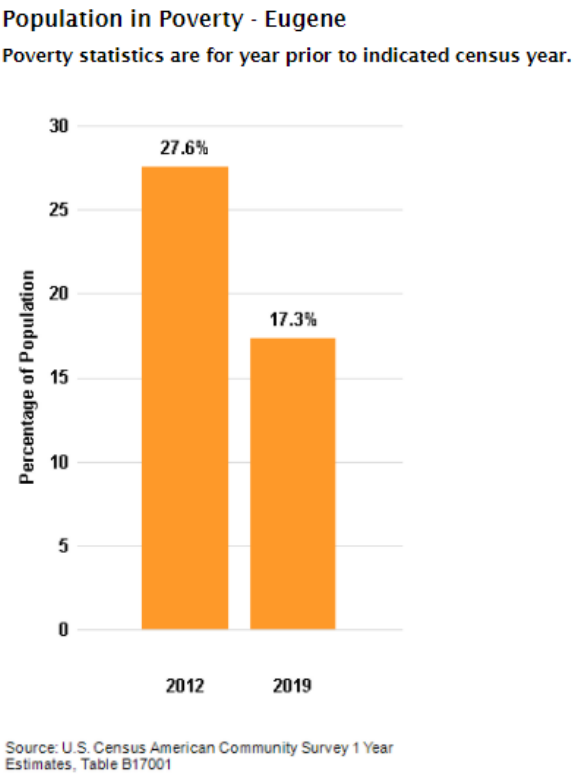
While median household income also trended upward over the monitoring period in Lane County and Oregon, Eugene's median household income has remained noticeably lower than Lane County and Oregon and that gap has grown over the monitoring period. This difference, at least in part, is due to the presence of the University of Oregon and other colleges, as student-only households are likely driving down the overall median household income. Instead of all households, looking at the income of just *family* households has a different outcome, a family being a group of two people or more (one of whom is the householder) related by birth,

[14] A household is cost-burdened when it spends more than 30% of its income toward housing costs and is severely cost-burdened when it pays more than 50% of its income toward housing expenses, as defined by the U.S. Department of Housing and Urban Development.

marriage, or adoption and residing together. Comparatively, Eugene's median family income ($84,543 in 2019), has been much higher than household income throughout the monitoring period.[15]

The rise in household income correlates with Eugene's decrease in the proportion of the population in poverty[16] over the same period, from 27.6% in 2012 down to 17.3% in 2019, as shown in Figure 7. A similar trend is seen in both Lane County and Oregon as the national and local economy improved. It's important to note however, that although incomes have increased, housing costs have as well as discussed further below.

Figure 7



Many households that earn more than the federally defined poverty threshold still struggle with household costs and have unmet housing needs. ALICE (Asset Limited, Income Constrained, Employed), created by United Way, is a new way of defining and understanding the struggles of households that *earn above the Federal Poverty Level, but not enough to cover basic household expenses in the counties where they live*.[17] This assessment takes a more comprehensive look at the impacts of financial hardship on households. The most recent ALICE report (2018), states that 28% of households in Lane County were below the ALICE threshold[18] in addition to the 17% below the federal poverty rate, for a total of 45% of households that are either earning less than the federal poverty level, or above the poverty level but still less than needed to afford the ALICE bare-bones household budget. The percent of households in Lane

[15] 2019: ACS 1-Year Estimates Detailed Tables, https://data.census.gov/cedsci/table?q=median%20family%20income&text= B19113&g=1600000US4123850&tid=ACSDT1Y2019.B19113

[16] Population in poverty is the percentage of people living below the federal poverty level. The threshold for poverty varies based on the number of people and children in a household. The 2019 ACS identified a threshold of $25,926 for a family of two adults and two children.

[17] https://www.unitedforalice.org/home

[18] The ALICE threshold represents the minimum income level necessary for survival for a household. The threshold is derived from the ALICE Household Survival Budget, which is the bare minimum cost of household basics necessary to live and work in the modern economy. These basic budget items include housing, childcare, food, transportation, technology, and health care, plus taxes and a contingency fund (miscellaneous) equal to 10% of the household budget.

County earning above the federal poverty rate but below the ALICE threshold has been 26-28% since at least 2010. Additionally, in 2017, 54% of K-12 students in Lane County were eligible for free and reduced-price meals.[19]

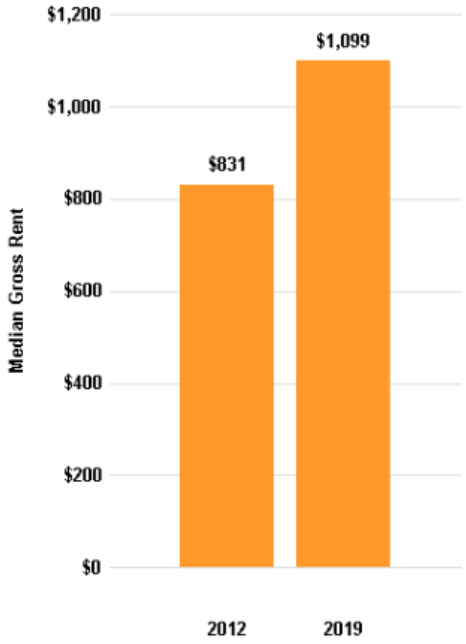
More recently the COVID-19 pandemic brought economic, healthcare, and education-related shortcomings into the forefront nationwide and had a more negative impact on households that were already vulnerable and struggling to afford household necessities. Federal stimulus payments and renter assistance may have benefited some households to fill the gap but did not provide any long-term financial stability. So, while the 2019 ACS data looks positive, the effects of the pandemic on poverty levels are not present in the 2019 data but may start to be seen in the 2020 Decennial Census data and over the coming years.

What are the housing affordability conditions for renters in the community?

In 2019, Eugene's median gross rent was $1,099, an increase of 32% from the beginning of the monitoring period in 2012 when the median gross rent was $831 (see Figure 8). The average annual increase in rent over this period was 4.2%. Median gross rent has been on an upward trend in Eugene, Lane County and nearby Lane County cities, and the state. Oregon has had an even higher increase in median gross rent, increasing from $862 in 2012 to $1,185 in 2019.

Figure 8

Median Gross Rent - Eugene



Source: U.S. Census American Community Survey 1 Year Estimates, Table B25064

Over the monitoring period, it appears that incomes were keeping pace with rents. The average percentage of monthly income that Eugene residents spent on rent decreased from about 47% in 2012 to about 39% in 2019 (however, this data has a higher margin of error and this may not be the trend it appears to be).[20] Eugene renters have consistently spent a higher percentage of their income on rent than renters in Oregon, Lane County as a whole, and all nearby Lane County cities. This is likely influenced by the fact that Eugene has a higher percentage of students in its population and student households

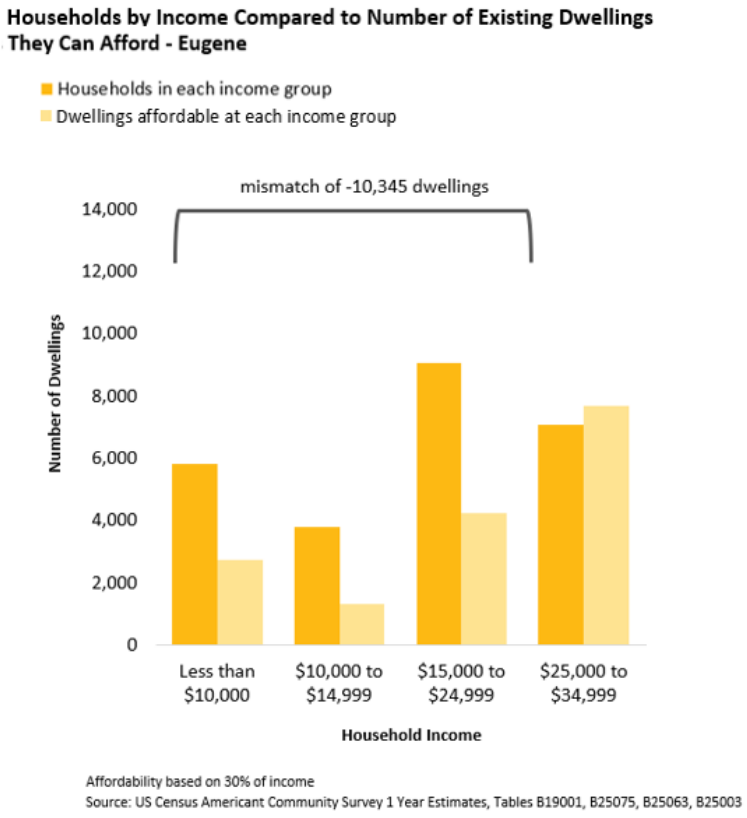
[19] https://static1.squarespace.com/static/587bc89edb29d69a1a2839f2/t/5d0949cedd550400010eb9c0/1560889807295/LaneFactSheet.pdf, Oregon Hunger Taskforce; data is based on calendar year 2017.

[20] The less volatile 5-year ACS confirmed a decrease in percentage of renter monthly income spent on rent from spending about 41% of income on rent in 2012 to spending 39% in 2019, though there was less of a drastic change in the 5-year data versus the 1-year ACS data.

typically have lower incomes and therefore are spending more of their income on rent than other households.

Even with the decrease in the average percentage of monthly income spent on rent, spending 39% of household income on rent indicates a household that is housing cost-burdened. The U.S. Department of Housing and Urban Development (HUD) indicates that households paying more than 30% of their income experience a housing "cost burden." More than half of Eugene renter households were housing cost-burdened during the monitoring period, ranging from 56-65% between 2012-2019. In 2019, the percent of cost-burdened households was the lowest it had been over the monitoring period (56%), consistent with the trend of a decrease in cost- burdened households in Eugene overall, including renter and owner households. Again, despite the decrease during the monitoring period, Eugene continues to have a higher percentage of cost-burdened renter households (56% in 2019) compared to Oregon (49%) and Lane County (51%) and housing affordability remains a huge issue impacting many households nationwide and in the community.

Figure 9



Additionally, as shown in Figure 9, according to the 2019 ACS, Eugene's existing housing supply (rented and owned dwellings) had a deficit of more than 10,000 dwellings that would be affordable for the number of Eugene households making $25,000 or less, meaning that many of those households are likely paying more than 30% of their income on housing costs (see Appendix C: General or Overarching Data, section Household Assumptions for the complete chart).

What are the housing affordability conditions for homeowners?

The median sales price for single-family housing (detached and attached) in Eugene has increased 119% over the monitoring period from $180,000 in 2012 to $395,000 in 2021, increasing 17.6% from 2020 to 2021 alone. Over the longer term, the median sales price has

increased 186% from 2000 ($138,000) to 2021 ($395,000).[21] These estimates are similar to sales data from other sources like Redfin and Zillow (see Appendix C: General or Overarching Data section Household Assumptions).

Between 2012 and 2019, according to the ACS, the median owner-occupied housing (mostly single-family) value that owners attributed to their houses increased 43%. When considering all housing types, not just single-family, according to County Tax Assessor data the median sales price for all housing types in Eugene have increased over the monitoring period. For instance, housing with two to four dwellings increased 96% between 2012-2021 and housing with five or more dwellings increased 286%.

Like renters, there was a slight decrease in the percentage of homeowners that were cost-burdened over the monitoring period, but the percentage of owner households that are cost-burdened is significantly smaller than renters. In 2019, Eugene owner households continued to have a similar percentage of cost-burdened owner households (25%) as Oregon and Lane County.

(For more information and data sources on this topic section, see:
Appendix C: General or Overarching Data, section Household Assumptions)

[21] Sales estimates are from Lane County Assessment and Taxation's housing sales data from the Regional Land Information Database (RLID).

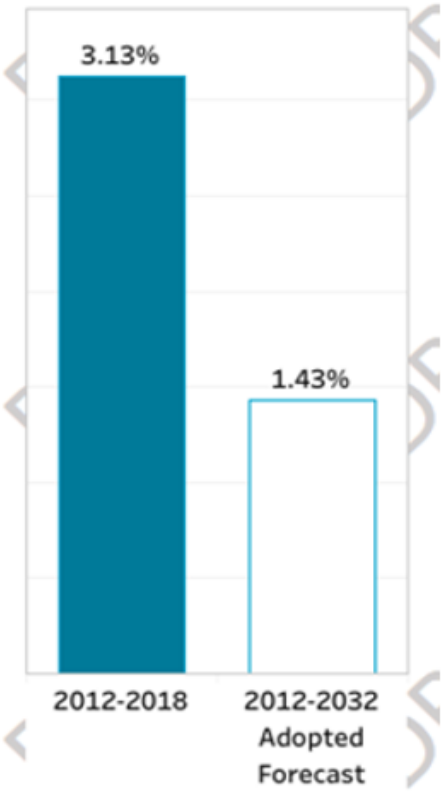
Snapshot – Job Growth – How are Eugene's jobs growing?

Summarizing Eugene's economy during the monitoring period is challenging given a historically significant recession right before the monitoring period, and the ongoing COVID-19 pandemic and associated economic shifts occurring at the time of this report. Most of the Eugene-specific jobs data in this report is from prior to the pandemic because the majority of the 8.5-year monitoring period is before 2020 and there is a lack of Eugene-specific data readily available for 2020 and later.

Generally, Eugene job growth has been higher than expected over the monitoring period through 2018, keeping better pace with population growth than projected, and the overall mix of jobs in the community closely matches the 2012-2032 projections for new jobs. Unless otherwise noted, job data in this report refers to covered jobs (jobs covered by unemployment insurance) rather than total jobs (those covered by unemployment insurance plus those not covered) because the covered jobs data is more available and highly accurate. Additional data will be needed during the next UGB analysis to understand total employment for Eugene, such as sole proprietors and others who are self-employed and those in the gig economy (short contracts, self-employed) who are most likely not covered by unemployment insurance and therefore not included in OED's covered jobs data.

Figure 10

Average Annual Employment Growth Rate (AAGR)



Sources:

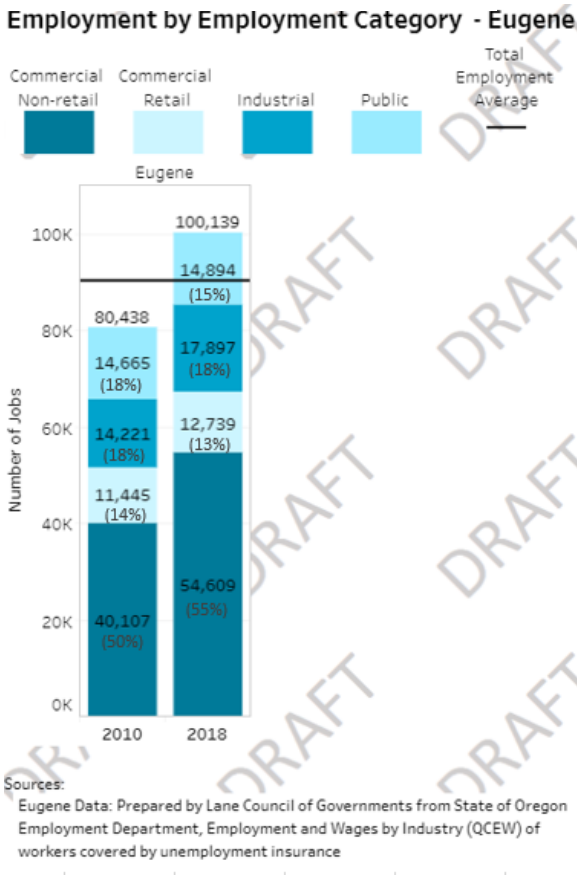
Eugene Forecast Data: City of Eugene Planning and Development Department, Eugene Land Model, for total employment

Eugene Historical Data: Prepared by Lane Council of Governments from State of Oregon Employment Department, Employment and Wages by Industry (QCEW) of workers covered by unemployment insurance

Is job growth happening at the pace it was anticipated?

Eugene has continued to see job growth, even despite the recent recessions over the past decade. Prior to the COVID-19 pandemic, Eugene's economy added 22,670 jobs over the monitoring period through 2018. As shown in Figure 11, Eugene experienced a significantly higher job[22] growth rate of about 3.1% during the first six years of the monitoring period (2012-2018) compared to the adopted 20-year forecast rate of 1.4%.[23] Job growth can be cyclical and with a recession ending around 2010, it is not surprising that Eugene experienced a high job growth rate in the following years. However, that rate is unlikely to be sustained through the 20-year planning period (2012-2032) as is reflected in the most recent Oregon Employment Department forecast for Lane County showing a slower projected growth rate of 1.4% between 2020-2030, which is the same as Eugene's currently adopted rate.

Figure 11



Sources:
Eugene Data: Prepared by Lane Council of Governments from State of Oregon Employment Department, Employment and Wages by Industry (QCEW) of workers covered by unemployment insurance

Regarding the impacts of the COVID-19 pandemic, the Oregon Office of Economic Analysis noted recently that Oregon is recovering much faster than in recent cycles[24] and that as of July 2021 Lane County had regained 51% of the jobs lost in March and April 2020 at the onset of the COVID-19 crisis.[25] So, while Eugene job growth was much higher than projected before the pandemic, it may be slower than the adopted rate per the new Lane County 2019-2029 forecast, or may be bringing back jobs lost during the pandemic and not actually creating new post-2012 jobs. The Oregon Employment Department anticipates providing an employment

[22] Unless otherwise noted, this section focuses on 'covered' jobs, that is, jobs covered by unemployment insurance, rather than all or total jobs because there is accurate and relatively current source data for covered jobs from the Oregon Employment Department.
[23] Eugene adopted the Oregon Employment Department (OED) 10-year forecast rate for Lane County for 2012-2022 and assumed that rate for the 20-year period of 2012-2032.
[24] Oregon Office of Economic Analysis, https://oregoneconomicanalysis.com/2021/07/20/labor-supply-optimism/
[25] Oregon Employment Department July 20, 2021 press release, https://www.qualityinfo.org/documents/10182/73818/Employment+in+Lane+County?version=1.95

growth forecast annually going forward so the next forecast (in 2022) would incorporate trends from the pandemic.

What types of jobs have had the most change?

Consistent with the previous UGB analysis, in this report Eugene's jobs are grouped into the following broad categories:

- Commercial non-retail (e.g., professional services, financial, entertainment, food services)
- Commercial retail
- Industrial (e.g., construction, manufacturing, wholesale trade)
- Public (Government) Sector

In 2018, the mix or the amount of Eugene's jobs in each of these broad categories was similar to the mix of new jobs projected for 2012-2032 with about half being commercial non-retail and the remainder almost evenly split between the commercial retail, industrial and public categories. As shown in Figure 11, between 2010-2018 Eugene experienced the biggest increase in commercial non-retail jobs, which are more than half of Eugene's 2018 covered jobs (up 36%) and in industrial jobs which are 18% of Eugene's jobs (up 26%). The specific job sectors that had some of the highest percentage gains and added the greatest number of jobs were the commercial non-retail job sectors of Health Care and Social Assistance (68% or 7,579 new jobs) and Accommodation and Food Service (33% or 2,408 new jobs).

This is important to highlight because healthcare practitioners and healthcare-support workers have higher wages in Oregon than in the nation, and this difference is more pronounced in Lane County (of which Eugene is Lane County's major job center) because Lane County has lower wages in general than Oregon.[26]

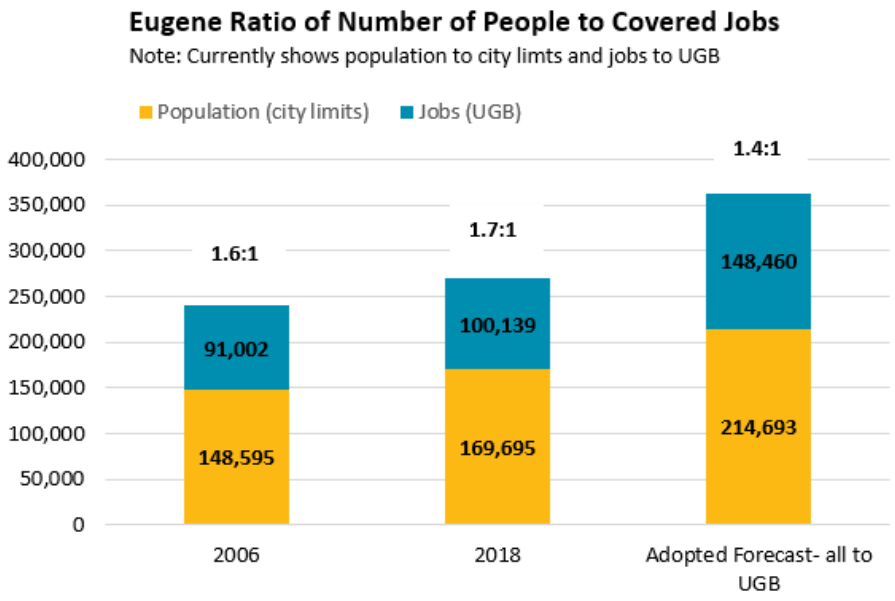
Are jobs keeping up with population growth?

Ideally, a city's job growth keeps up with population growth. A bigger employment center like Eugene typically has a lower population to jobs ratio like 1.5 to 2.0 people to each job, or 1.5:1. Eugene's employment has rebounded since the 2007-2009 recession. As shown in Figure 12,[27] during the monitoring period (but before the COVID-19 pandemic), the ratio of the population

[26] https://www.qualityinfo.org/documents/10182/96541/Lane+County+Economic+Indicators?version=1.84, and email correspondence, Oregon Employment Department, August 21, 2021.

[27] As noted in Figure 10, the ratio of number of people to covered jobs currently shows population within the city limits and jobs within the UGB. This will be updated in future monitoring so that both population and jobs numbers will be within the UGB.

Figure 12



to the number of jobs was about the same in 2018 (1.7 people for each job) as it was in 2006 before the recession (1.6:1). This means Eugene's job growth was slower than population growth at least through 2018, with more people for each job than the adopted jobs and population forecasts projected.

Figure 13

Eugene Population and Jobs Growth Rates

	Actual: Population 2012-2021 Jobs 2012-2018	Adopted: UGB Forecasts 2012-2032	Most recent forecasts: Population 2020-2040 Jobs 2020-2030
Population Growth Rate (UGB)	1.2%	0.9%	0.9%
Jobs Growth Rate (UGB)	3.13%	1.43%	1.4% (Lane Co)

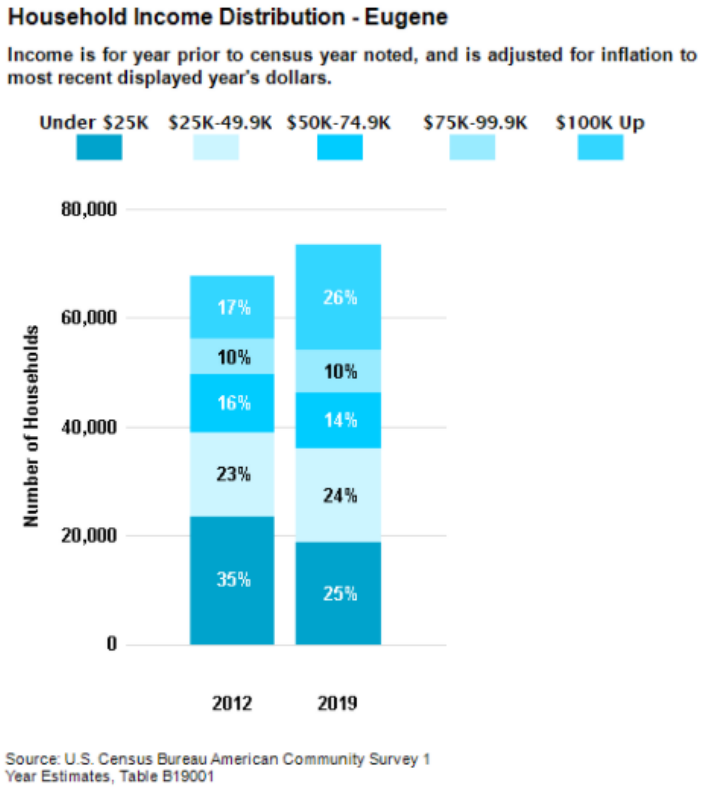
When comparing the growth rates over the monitoring period, Eugene jobs have been growing faster than population, but as previously noted the most recent forecasts project a slow down for both (Figure 13).

(For more information and data sources on this topic section, see:
Appendix C: General or Overarching Data, section Job Growth – How are Eugene's jobs growing?)

Snapshot – Jobs – How are Eugene's income, education, and job commutes?

How have wages and income distribution changed in recent years?

Figure 14



Source: U.S. Census Bureau American Community Survey 1 Year Estimates, Table B19001

Although average annual pay (or average wage) is not readily available for Eugene for the entire monitoring period, available data shows that it has risen by 6% between 2016 and 2018 (based on dollars not adjusted for inflation).[28] The average annual pay of jobs in Lane County has risen by 19.4% over the monitoring period (based on dollars adjusted for inflation), though this is lower than the statewide increase of 22.9% over the same period.[29] The Oregon Employment Department cites the presence of the University of Oregon as a possible factor contributing to this difference, because college students may take lower wage jobs and recent graduates create a large supply of entry-level applicants in the professional occupations. The presence of the University also contributes to the fact that Eugene has a higher proportion of residents with a bachelor's degree or more (43% in 2019) than Oregon (35% in 2019), which can impact the type of jobs and earning potential in a community.

[28] Eugene's average wage data is an approximation of payroll data in comparison to Lane County's wage data which is known. The QCEW covered jobs data for Lane County is reported to OED, which LCOG geographically re-distributes those jobs in Eugene's UGB using site address and disaggregating jobs from firms that report all their jobs as at a central location which are actually at various locations. Because disaggregated data is used for the jobs data, it is also used to derive the wage data rather than calculating it from the raw data where some jobs could be missed, however for firms that had to be disaggregated this process may over allocate higher paid jobs to one jurisdiction or another.

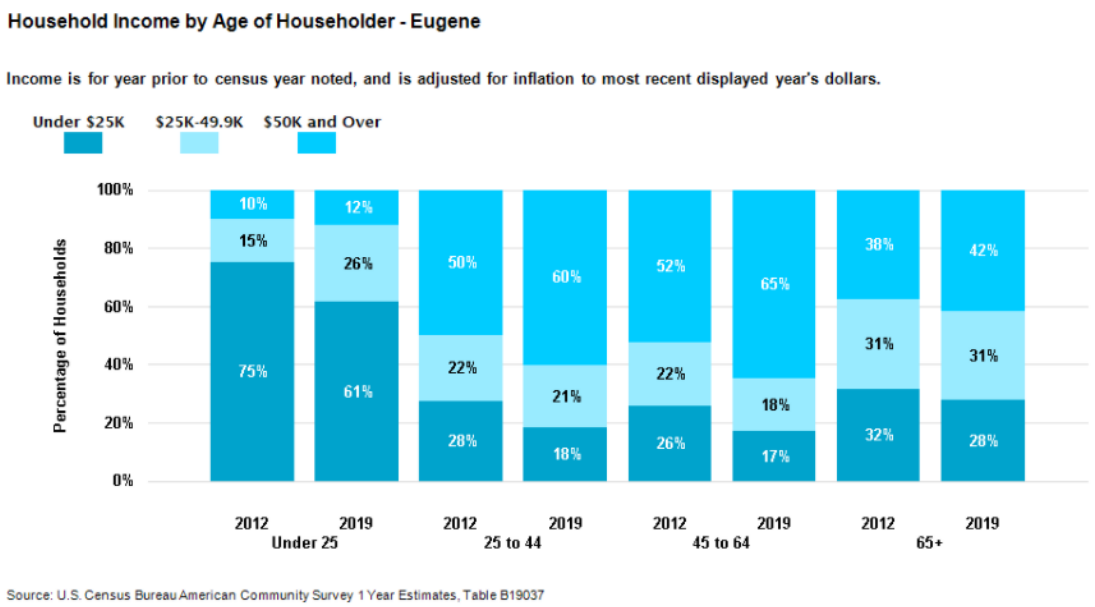
[29] Oregon's statewide minimum wage was $8.80 in 2012 compared to $12.00 in 2020, an increase of 36.4% over the monitoring period, which further corroborates the significant percent increase of average annual pay between 2012-2020.

As noted earlier, median household income increased 31% between 2012 and 2019. Additionally, household income distribution has been trending upward overall during the monitoring period with more Eugene households in higher income categories.

As shown in Figure 14, there was a sizeable decrease in the percentage of lowest-income households, those making less than $25,000 a year, from 35% (2012) down to 25% (2019). Eugene consistently has a higher proportion of household incomes making less than $25,000 compared to Oregon. Although there are now fewer households in the lowest income range, the cost of housing has generally increased more over the same period, continuing to impact housing affordability and poverty levels.

Looking at household income by the age of the householder, as shown in Figure 15, the community experiences the same general pattern as the nation; that income rises with age until about 65 years, and then declines. Additionally, most householders under 25 years old have incomes under $25,000. With Eugene following the county projections of an increase in the population over 75, but also 20-24 year olds maintaining the largest share of the population, Eugene will continue to need a spectrum of housing affordable to the bookends of the age spectrum.

Figure 15



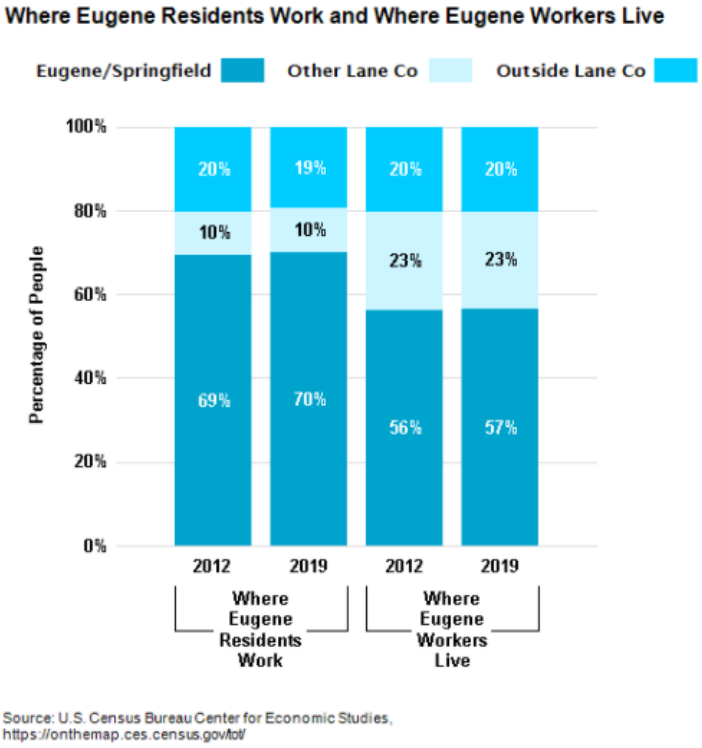
Source: U.S. Census Bureau American Community Survey 1 Year Estimates, Table B19037

Where do Eugene residents work? Where do Eugene workers live?

Commuting patterns are ultimately market-based and there is not a lot a community can do to significantly influence where people work. However, gathering information about where people live and work can assist in planning for future jobs in the community.

As shown in Figure 16, in 2019, a high percentage of *Eugene residents* (70%) work in Eugene/Springfield. This is consistent with data that shows that more than 80% of Eugene residents spend less than half an hour commuting to work. The COVID-19 pandemic, in which many office workers have worked from home for some period, will likely influence where residents work and workers live nationwide, as employers and employees explore flexible work-from-home scenarios that more easily allow people to work and live in different places. The Oregon Office of Economic Analysis expects that there will be fundamental gains in the number of people working from home as it becomes a larger part of standard business practices, but the extent of and the impacts this may have on communities remains an open question.[30]

Figure 16



Source: U.S. Census Bureau Center for Economic Studies, https://onthemap.ces.census.gov/tot/

Regarding *Eugene workers*, in 2019, more than half (57%) of those who work in Eugene also live in Eugene/Springfield and about half commute to other locations in Lane County or further. However, it makes sense that the number of workers who have a short commute is not higher, Eugene is by far the largest city in Lane County and it is the economic center for the county with large employers such as the University of Oregon that attract employees from a larger area.

(For more information and data sources on this topic section, see:
Appendix C: General or Overarching Data, section Jobs – How is Eugene's Income, education and job commutes?)

[30] Oregon Office of Economic Analysis, Just How Much is Working from Home on the Rise, https://oregoneconomicanalysis.com/2021/12/16/just-how-much-is-working-from-home-on-the-rise/

Development of The Nel (Permanent Supportive Housing). Photo by City of Eugene staff.

VIII. Housing Development Metrics

Housing development metrics looks at building permit activity for new dwellings and related development, the number of new dwellings by structure type, how much and what type of land new housing development is being built on, and whether efficiency measures have been used for that development. This section covers questions and key indicators related to housing development in general.

Key Questions- Housing Development General

General / Overarching Data: Low, Medium and High Density Residential

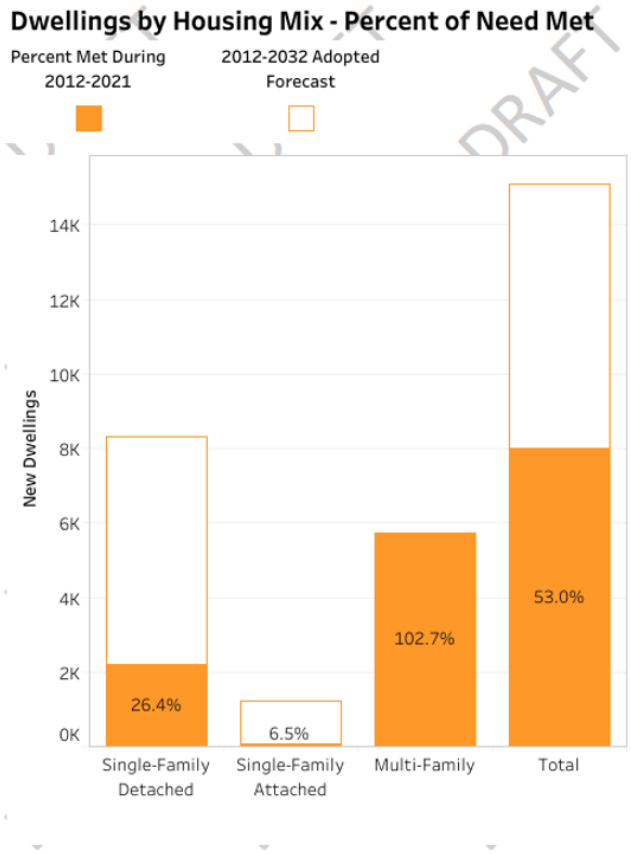
KEY QUESTIONS	SUB-QUESTIONS	KEY INDICATORS
Is housing developing at the pace anticipated and needed?	• How many new dwellings? • Are new dwellings keeping up with population growth?	• Number of new dwellings by structure type • Population growth
Is the mix of new housing in line with what was anticipated? Is it meeting the need?	• How many new single-family dwellings? • How many new multi-family dwellings? • How many new dwellings by type of structure?	• Number of new dwellings by structure type

Snapshot – Housing Development General

Is new housing developing at the pace anticipated and needed?

The total number of new dwellings forecast as needed to accommodate the projected population growth for 2012-2032 is 15,105. The following are the housing needs from the currently Adopted Forecast. Housing needs may change during the next UGB analysis based on new population forecasts, housing affordability, state regulations, and information in this report about changing trends.

Figure 17



Sources:

2012-2021: City of Eugene Planning and Development Department, building permits database
Forecast Data: City of Eugene Planning and Development Department

Regarding overall housing production, the average number of dwellings from building permits issued each year between 2013-2020 was 915,[31] surpassing the average of 755 dwellings per year needed to meet the Adopted Forecast.

Including partial year data from the end of 2012 to July 2021, about 53% (8,011 net new dwellings) of the total housing need has been met over the 8.5-year monitoring period but almost three quarters of the new dwellings have been multi-family (72%). As the number of building permits for dwellings fluctuates by year, the average number of dwellings per year may continue to increase or slow down. While it appears the community is on track to meet the total forecast housing need by 2032, as discussed further below, and as shown in Figure 17, much of that has been larger apartment buildings, and the single-

[31] To determine an annual average, only data from full years was used so that the average would not be artificially low. However, in counting the total number of dwellings over the planning period, new dwellings from the end of 2012 up to July 21, 2021, were counted.

family housing pace is well below expected.

Another measure is comparing whether the pace of new housing is keeping up with the pace of population growth. Both housing and population have increased over the monitoring period. As shown in Figure 18, the average annual growth rate (AAGR) over the monitoring period is slightly higher for new dwellings at 1.4% than for population growth at 1.2% which means the growth rates are occurring at about the same pace. However, this comparison only addresses whether housing growth is keeping up with population growth. It does not address deficiencies that already existed in Eugene's housing supply, likely even before 2012. For instance, a draft Regional Housing Needs Analysis methodology prepared for the State of Oregon estimated that as of 2018 Eugene had an existing underproduction or shortage of more than 8,200 dwellings to house existing demand.[32]

Figure 18 **2021**

Population through 2021, housing through 2020

	Net Change	Percent Change	AAGR
Eugene population (city limits)	**17,291**	10.9%	**1.2%**
Total residential dwellings*	**7,317**	11.5%	**1.4%**

Sources:

City of Eugene Planning and Development Department
Portland State University

Is the mix of new housing in line with what was anticipated? Is it meeting the need?

The "housing mix" typically refers to the percentage of each housing type, collapsed into broad categories, that makes up the total dwellings. The different types of housing that make up Eugene's "housing mix" include the following three categories:[33]

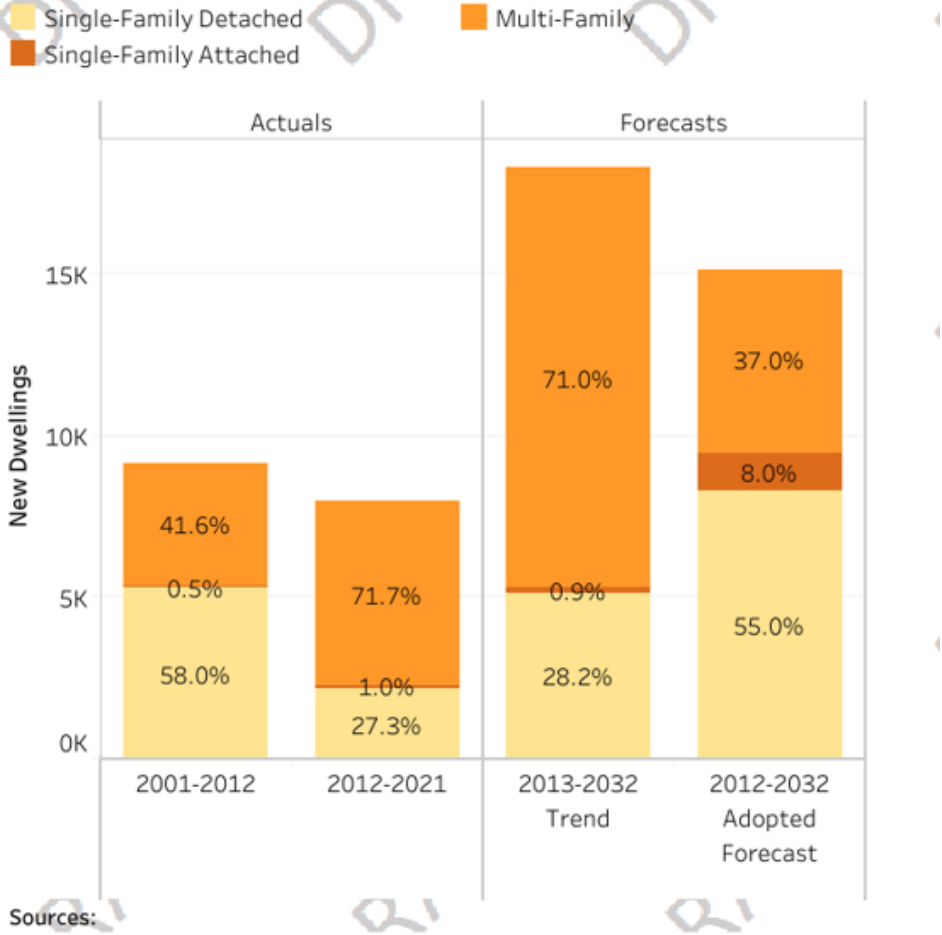
- Single-family detached: single or one-family detached dwellings, manufactured homes in or not in a park, and accessory dwellings
- Single-family attached: townhouses, rowhouses, and condominiums
- Multi-family: two to four dwellings (duplex, triplex, fourplex) or five or more dwellings (typically apartments)

[32] https://www.oregon.gov/ohcs/about-us/Documents/RHNA/2020-RHNA-Technical-Report-Final.pdf
[33] The housing categories and housing types are as used in the adopted Residential Land Supply Study (2012-2032) and previous UGB analysis.

Figure 19

Number/Percentage of Dwellings by Housing Mix

Some 2012 permits are included in the monitoring data because their development was not already clearly accounted for on the BLI. Partial year permits in 2012 and the current year are excluded from the Trend calculation.



Sources:

2001-2012: City of Eugene Planning and Development Department, Issued Phased and Non-Phased Building Permits

2012-2021: City of Eugene Planning and Development Department, building permits database

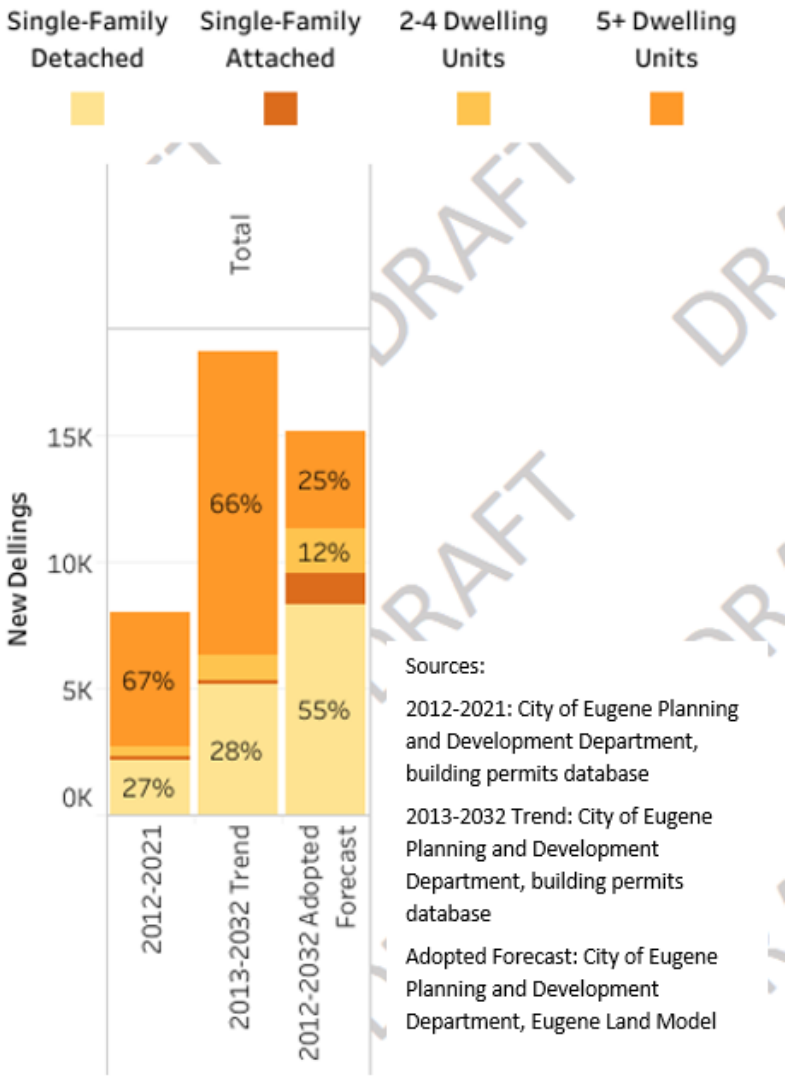
2013-2032 Trend: City of Eugene Planning and Development Department, building permits database

Adopted Forecast: City of Eugene Planning and Development Department, Eugene Land Model

Figure 20

Percentage of Dwellings by Housing Mix Subcategory and BLI Plan Designation

2012 permits were included in monitoring years only if not already clearly accounted for in the BLI. Housing Mix Subcategories Commercial and Group Quarters (potential) are excluded from this chart. Trend calculations are for all data from 2013 through last complete review year 2020.



New housing over the 2012-2032 period is planned to be a mix of 55% single-family detached housing types and 45% multi-family housing types (8% for single-family attached and 37% for other attached housing types). As shown in Figure 20, over the 2012-2021 monitoring period, Eugene's housing mix has experienced slower production of new single-family detached dwellings and higher production of new multi-family dwellings than forecast, and compared to 2001-2012 historical data. About half (53%) of the total housing need projection through 2032 has been met but predominately through a high production of larger multi-family housing development (which has exceeded the number of new 5+ dwelling structures anticipated during the planning period).

Historically, from 2001 to 2012, single-family detached dwellings were 58% of new dwellings, with 41.6% attributed to multi-family dwellings and 0.5% to single-family attached (Figure 19). As shown in Figure 20, during the 2012-2021 monitoring period, the

number of net new[34] single-family detached dwellings (2,191) made up closer to a quarter (27%) of the total new dwellings while about 72% of the new dwellings were attributed to multi-family (5,742 dwellings, not including single-family attached). Within the new multi-family housing, 93% are structures of 5+ dwellings and almost 35% of the new multi-family housing was identified as potentially student oriented due to its location, amenities, developer portfolio or marketing.

Should the development trend from 2013-2021 continue through the end of the planning period (2032), Figure 20 shows that the number of new 5+ dwelling structures would increase substantially, making up approximately 66% of the housing mix compared to the 25% anticipated in the 2012-2032 Adopted Forecast. It is possible that the pace of student-oriented housing may decrease (such as if the University of Oregon's enrollment slows) which could slow the pace of multi-family housing. In addition, new 2-4 dwelling structures will fall significantly short of the forecast if their pace does not increase. Similarly, if the trends continue the total number of new single-family dwellings would also be significantly short, making up 26.8% less of the housing mix than the Adopted Forecast. At nearly halfway through the 2012-2032 monitoring period, only 26.4% of the identified single-family housing need has been met.

However, housing development can be cyclical as shown over the historical period. Often single-family and multi-family housing types do not experience a building boom at the same time but rather they alternate. Additionally, part of the reason for the growth in multi-family housing has been housing marketed for students and around the University of Oregon. Building that specific type of housing is unlikely to continue indefinitely, especially if the University does not grow greatly or at a heightened pace. On the other hand, removing barriers to middle housing (duplexes, triplexes, fourplexes, townhouses and cottage clusters) as a result of implementing the requirements of House Bill 2001 (2019) may increase these housing types over time.

(For more information and data sources on this topic section, see:
Appendix D: Housing Development Data, section Housing Numbers and Housing Mix)

[34] The data available on new dwellings during 2001-2012 is the total number of new dwellings from issued permits, whereas the monitoring period data is the net new dwellings after demolitions and replacement dwellings are accounted for to the degree possible.

Key Questions- Housing Development: Efficiency Measures

General / Overarching Data: Low, Medium and High Density Residential

KEY QUESTIONS	SUB-QUESTIONS	KEY INDICATORS
Are efficiency measures successfully working to increase expected new housing?	• How many new accessory dwellings? • How many new dwellings on land re-designated to Low Density Residential? • How many additional dwellings on land designated Medium and High Density through redevelopment? • How many new dwellings with affordable housing incentives? • What efficiency measures/ investments have been utilized? Where?	• Number of accessory dwellings • Number of dwellings in each of the three re-designation areas • Amount of redevelopment on Commercial and Medium and High Density residentially designated lands • Use of incentives (Multi-Unit Property Tax Exemption, Low Income Rental Housing Property Tax Exemption, fee reductions, etc.)

Snapshot – Housing Development: Efficiency Measures

Have the efficiency measures (or compact development strategies) for housing been successful?

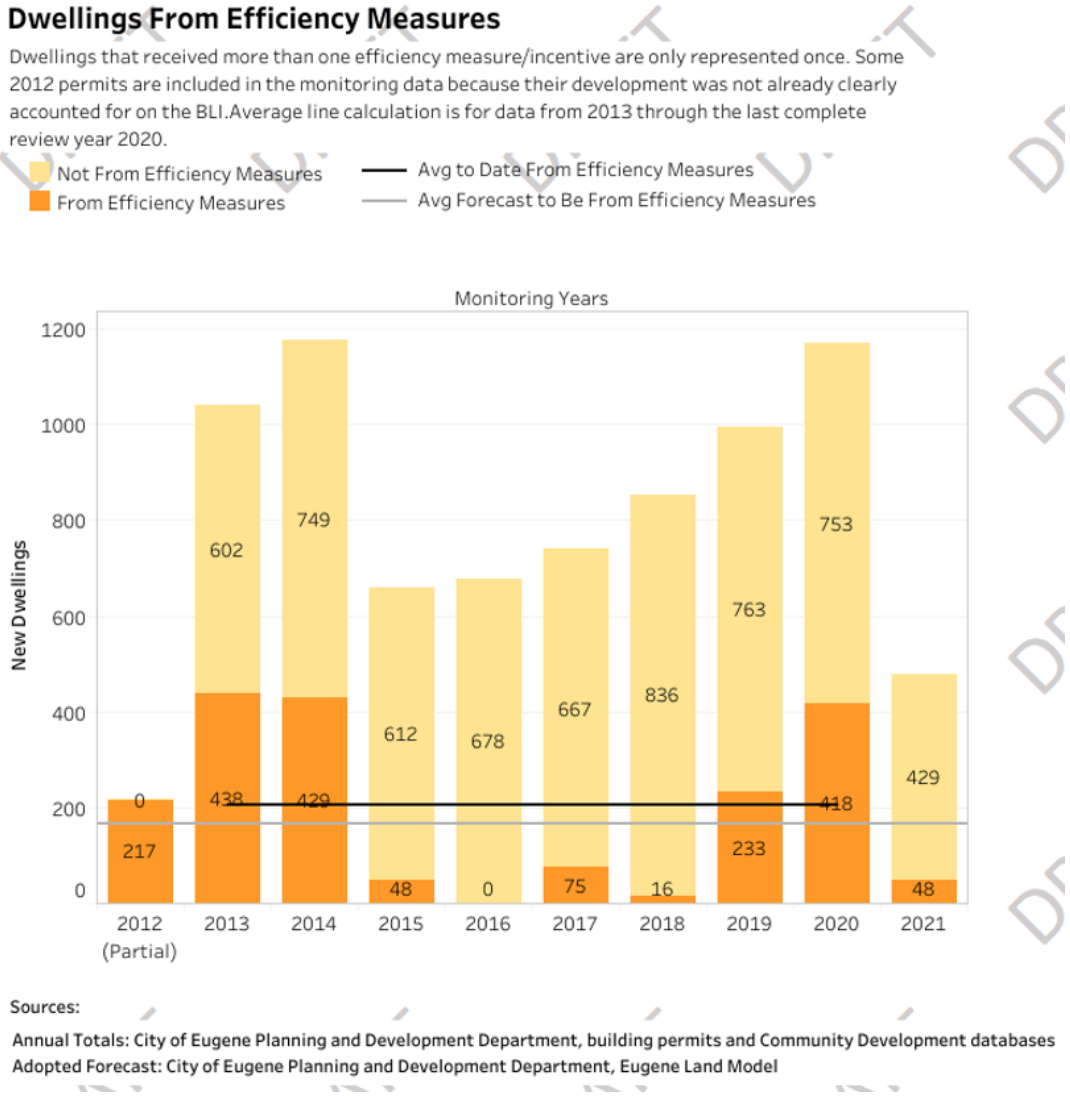
Efficiency measures, also called compact development strategies or development incentives, are actions the City takes to facilitate development that uses land more efficiently than would have occurred without these incentives, based on historical trends. Efficiency measures such as changes to the land use regulations to remove development barriers or providing financial incentives increase the expected capacity of land for additional housing (or jobs) development beyond what is likely to occur if the City does not make these changes.

As part of the Envision Eugene process and UGB adoption, the City adopted or counted on the following efficiency measures to increase the productivity of residential land within the UGB (see Appendix D. Housing Development section - Housing Efficiency Measures for details):

- Changed the **comprehensive plan designation** of three areas (Crow Road area, Gilham Road site, and Irving Road/former Eagles Lodge site) to Low Density Residential for a total of 200 acres (A comprehensive plan designation identifies the planned use for a property. Eugene's Buildable Lands Inventory is based on plan designations.)
- Incentivize **accessory dwellings** through amendments to land use regulations and credits towards some permitting fees

- Incentivize **affordable housing**[35] by preparing Affordable Housing Land Bank sites for future development and sale at less than market rate
- Increased the **minimum density** for new development on R-2 Medium Density Residential land from 10 to 13 dwellings per net acre
- Facilitate more housing **downtown** through a multifaceted programmatic approach including land use regulation changes, staff facilitation, and financial incentives

Figure 21



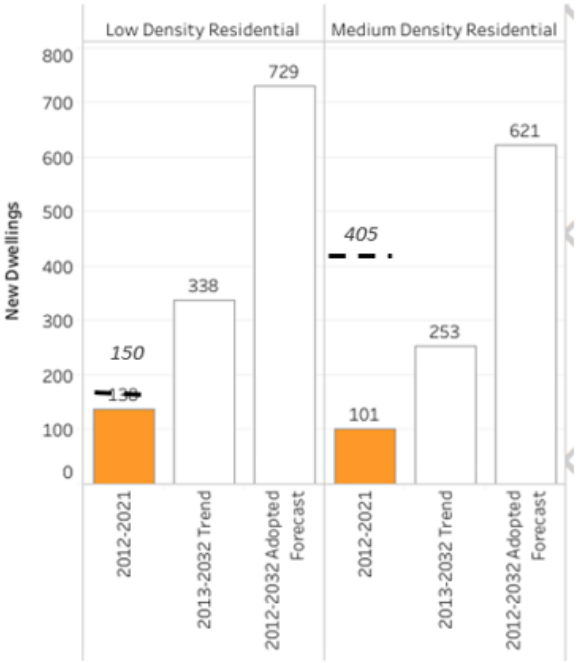
Sources:
Annual Totals: City of Eugene Planning and Development Department, building permits and Community Development databases
Adopted Forecast: City of Eugene Planning and Development Department, Eugene Land Model

[35] "Affordable housing" (sometimes called "income qualified housing") in this report refers to housing that is set aside for households earning no more than 80% of the Area Median Income. Different affordable housing efficiency measures may have different income caps.

Overall, 2,248 of the 8,011 new dwellings utilized efficiency measures (28%).[36] As shown in Figure 21, the *preliminary* total number of efficiency measure dwellings per year was slightly higher on average during the monitoring period as compared to the total number forecast for the 20-year period and is even higher when the preliminary number is adjusted to reflect the manual review required for some efficiency measures. When just looking at the total number of efficiency measure dwellings, it is on pace to meet the total number projected.

Figure 22

Efficiency Measure Dwellings by BLI Plan Designation



Sources:
2012-2021: City of Eugene Planning and Development Department, building permits and Community Development databases
2013-2032 Trend: City of Eugene Planning and Development Department, building permits and Community Development databases
2012-2032 Adopted Forecast: City of Eugene Planning and Development Department

Have efficiency measures been successful for housing on Low Density Residential land?

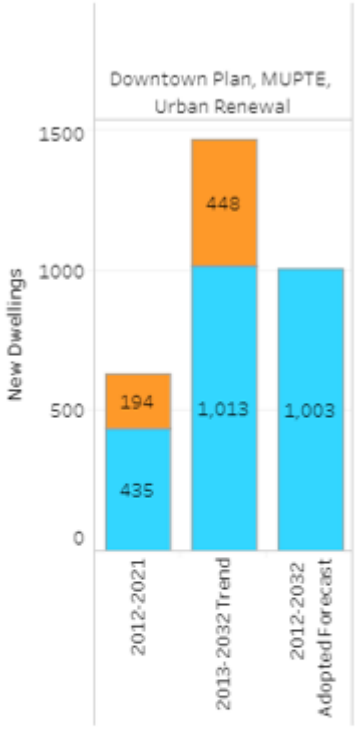
When looking at dwellings by comprehensive plan designation (or "plan designation") the picture is different, especially for Low Density Residential as compared to other designations. The efficiency measure action anticipated to add the most additional capacity for new dwellings in Low Density Residential designated areas was re-designating land to Low Density Residential, including more than 170 acres in the Crow Road area in west Eugene. Incentivizing accessory dwellings through changes to the land use code and credits towards systems development charges for permits are additional efficiency measure actions the City took and have a smaller projected gain (about 19 acres). As shown in Figure 22, in general, new dwellings in Low Density Residential designated areas that used efficiency measures (159 new dwellings) are occurring much slower meeting only 22% of the forecast at nearly halfway through the 20-year period. Therefore, if trends continue, they would be significantly short of meeting the forecast need by

[36] As discussed further in Appendix D Housing Development Details, the charts showing dwellings from efficiency measures are preliminary estimates. There are some efficiency measures that required manual review to determine the number of dwellings gained from those measures. After that review, dwellings from efficiency measures increased from 1,966 to 2,248. Some charts have been altered to reflect the additional dwellings, as shown with a black dashed line and corresponding number on the Efficiency Measure Dwellings by BLI Plan Designation chart.

2032. This is likely because the majority of the Crow Road area is unannexed, as utilities are not close enough to allow for annexation and subsequent development. And while accessory dwellings have increased since the incentives were added, their gain (6.9 more dwellings per year on average than before the incentives) is relatively small in comparison.

Figure 23

Dwellings by Efficiency Measure and Plan Designation



Sources:
2012-2021: City of Eugene Planning and Development Department, building permits and Community Development databases
2013-2032 Trend: City of Eugene Planning and Development Department, building permits and Community Development databases
2012-2032 Adopted Forecast: City of Eugene Planning and Development Department

Have efficiency measures been successful for housing on Medium and High Density Residential and Commercial lands?

The action anticipated to add the most additional capacity for housing on Medium Density Residential land occurred as part of the UGB adoption. The City's land use code was amended to increase the minimum density required for new housing development in the R-2 Medium Density Residential zone, with the goal of raising the average density of new medium density housing from 10 to 15 dwellings per acre. (Most, although not all R-2 zoned land is designated as Medium Density Residential, which is why the change in density for R-2 zoned land is included here.) Over the monitoring period of 2012-2021, the density for new housing on Medium Density Residential land has been higher than historical densities but is still below the average density required to meet the forecast need. This is likely because the new minimum density was not in effect until 2017 and some of the new housing during the monitoring period was approved under earlier land use approvals that vested the projects in the lower minimum densities. However, the number of permits issued for new dwellings in 2017 or later that are above 10 dwellings per net acre brings the total medium density efficiency measure dwellings up to 405, equating to about 65% of the forecast medium density dwellings needed from efficiency measures. This is more than anticipated for this point in the monitoring period.

New housing on land that allows higher density housing (High Density Residential and Commercially designated land combined) has utilized efficiency measures the most as compared to other residential plan designations. The actions to add additional capacity for high density housing were almost entirely related to facilitating more housing in downtown through a multifaceted programmatic approach including land use regulation changes, staff facilitation and financial incentives like the Multi-Unit Property Tax Exemption (MUPTE). As shown on

Figure 23, almost 63% (or 629 dwellings) of the 1,003 additional dwellings forecast for downtown (after 2013) has been met with this programmatic approach (dwellings on commercial plan designations in blue and on residential plan designations in orange), and if this trend continues housing development downtown is on pace to exceed the forecast amount. However, as discussed in the Executive Summary and in the City's Housing Implementation Pipeline, there are deficiencies in the overall housing supply that still need to be addressed related to housing costs, homelessness, and underproduction of housing in previous years.

(For more information and data sources on this topic section, see:
Appendix D: Housing Development Data, section Housing Efficiency Measures)

Key Questions –Housing Development Land Supply

Land Supply: Low, Medium, and High Density Housing

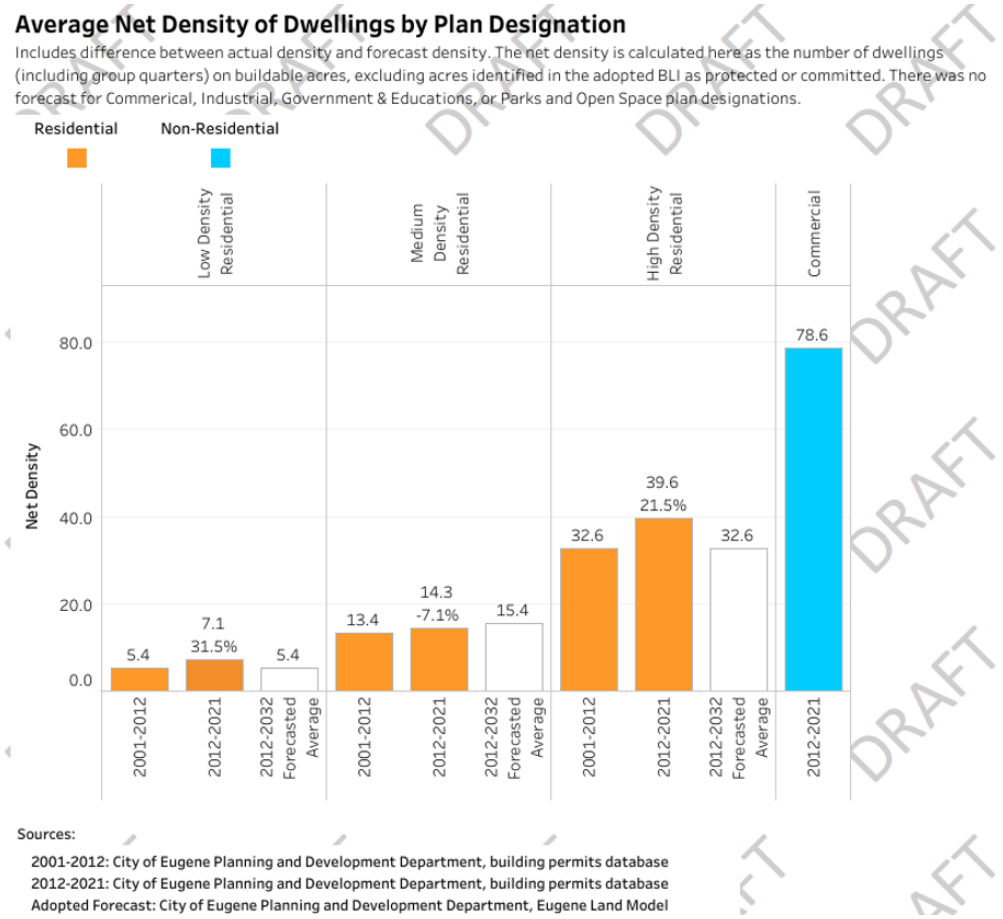
KEY QUESTIONS	SUB-QUESTIONS	KEY INDICATORS
Has land for housing developed at the anticipated rate?	• At what density are new dwellings being constructed? • What percent of Vacant land has been built on? • What percent of Partially Vacant land has been built on? • What percent of anticipated redevelopment has occurred on Medium and High Density Residential designated land? • What percent of anticipated redevelopment has occurred on Commercial designated land? • What percent of anticipated "other uses" (non-housing) have occurred on residentially designated land?	• Density of housing • Acres of Vacant land in supply • Acres of Partially Vacant land in supply • Amount of redevelopment on Commercial and Medium and High Density Residential designated lands • Number of group quarters • Acres of other use: land purchased for parks, land developed with infrastructure, University of Oregon, or commercial
Have new regulations gone into place that have an effect on the buildable lands supply?		• Acres lost/gained in buildable lands supply due to new regulations
Have more lands for housing become available through infrastructure extension?		• Capacity of lands newly served by infrastructure

Snapshot – Housing Development Land Supply

Has land for housing developed at the anticipated rate?

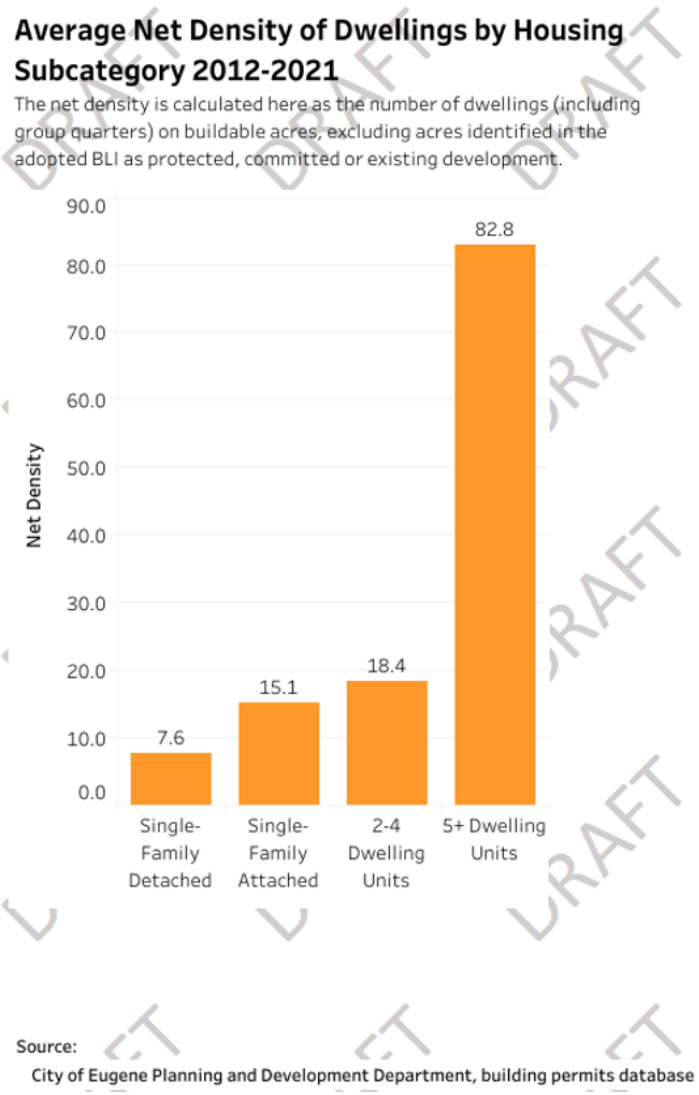
Over the monitoring period (2012-2021), almost half of the 8,011 net new dwellings were on Commercial and High Density Residential designated land combined, compared to 32% on Low Density Residential land and 18% on Medium Density Residential designated land. New housing has been overwhelmingly (92% or 7,686 dwellings) on flat land in all plan designations. As shown in Figure 24, new housing has been denser than forecast, developments on Commercial land had the highest density at 78.6 dwellings per net acre and developments on both High and Low Density Residential land exceeded the forecast density by 21.5% and 31.5%, respectively. However, *it is cautioned that because the methodology for calculating density during monitoring is different than that used for the forecast density it is difficult to fully compare the two.* As shown on Figure 25, developments with 5+ dwelling structure types had the highest overall densities at 82.8 dwellings per net acre.

Figure 24



The total amount of new *dwellings* were split almost evenly with 41% (3,281) being on Developed land and 54% (4,331) on Vacant and Partially Vacant combined. (Eugene's land supply is divided into multiple categories, including Vacant, Partially Vacant, Developed, Committed and Protected. Vacant land has little to no improvements. Partially Vacant land includes larger lots with significant improvements but some area for more development. Developed land is considered fully developed. See section XIII References, Definitions, Glossary for definitions regarding Eugene's Buildable Lands Inventory). The forecast assumed much less new housing on Developed land (23%). If trends continue, total dwellings on Developed land would exceed the forecast, on Vacant land would meet the forecast, and on Partially Vacant land would be below the forecast. However, when breaking down new dwellings by plan designation, if trends continue total new dwellings on all types of High Density and Commercial lands would exceed forecasts, compared to new dwellings on Vacant and Partially Vacant Low and Medium Density Residential lands would not meet the forecast.

Figure 25



On the other hand, the total amount of *acres developed* [37] with new housing has been overwhelmingly Vacant or Partially Vacant land (73%), and overwhelmingly in residential

[37] These estimates are an approximation and are only used for the purposes of getting an estimate of how much of the adopted land supply has been developed. For instance, lots under 0.5 acre in size were not manually reviewed for BLI impacts so these estimates include that the entire lot was developing even if only a portion of the lot was impacted. These estimates do not replace the more accurate status of the lands supply that comes from re-running the BLI model.

designations (93%) compared to commercial designations (6%). However only 67% of all new *dwellings* have been on residential plan designations. Or put another way, 510 residential acres developed with 5,406 dwellings compared to 33 commercial acres developed with 2,314 dwellings, which is because of the number of large apartment buildings on Commercial designated land.

Has Low Density Residential land developed with housing at the anticipated rate?

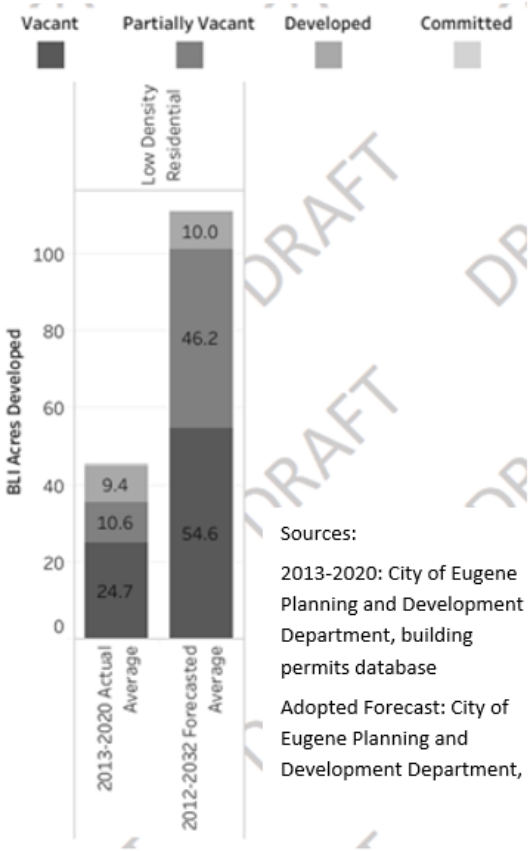
It is estimated that new housing developments on Low Density Residential designated land have been 31.5% denser than the forecast (7.1 dwellings per net acre compared to 5.4). Density on smaller lots, regardless of slope, experienced the highest increase compared to the forecast.

As shown on Figure 26, the acreage of Vacant and Partially Vacant Low Density Residential land developed with new housing has been *on average* much slower than anticipated over the monitoring period. This correlates to the slower production of new single-family housing over the same time, which primarily developed on Low Density land. If these trends continue, the housing capacity anticipated for Low Density land would not be realized, at only 68% met by 2032.

Figure 26

Annual Average Acres Developed by BLI Category and Plan Designation – New Dwellings

Actual Average calculation is for data from 2013 through the last complete review year 2020.



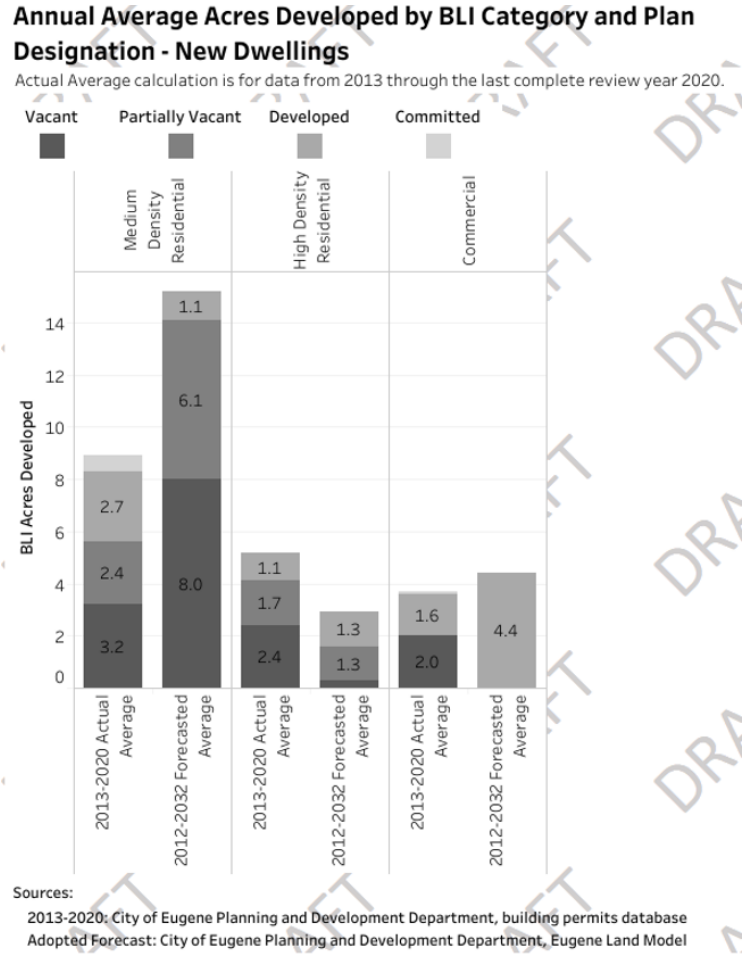
This is related in part to the lack of utilities serving large areas of the Low Density Residential land supply. According to the 2021 Buildable Lands Inventory rerun, approximately 42% of the Vacant and Partially Vacant Low Density land supply is unannexed. A portion of that is the Crow Road area with about 114[38] acres of unannexed, developable land that is not available for annexation and subsequent development because utilities have not been extended and or are not financially feasible for one project to extend.

[38] From the 2021 BLI, the total estimated housing capacity on Low Density Residential land in the Crow Road area is estimated to be 631 dwellings when annexed land is included. For comparison, the estimated housing capacity for Low Density Residential land in the same area that is unannexed was 560 dwellings.

Has Medium and High Density Residential land and Commercial land developed with housing at the anticipated rate?

Density for new housing on Medium Density Residential land was higher on average (14.3 dwellings per net acre) than historical density (13.4) but less than the forecast density (15.4). This is not unanticipated at this point, since the changes to increase the minimum density did not go into effect until 2017, which is later in the monitoring period. Density of new housing on High Density Residential designated land was also higher (39.6 dwellings per net acre) than the forecast (32.6). However, housing on Commercial designated land surpassed all plan designations with a density of 78.6 dwellings per net acre. This is because, as shown in Figure 25, 5+ dwelling structures were the highest density (82.8) of the housing types and that was the majority of new housing on Commercial land. When excluding potentially student-oriented housing development, densities of new housing on land designated High Density Residential or Commercial decrease to 26.8 and 31.4 dwellings per acre, respectively.

Figure 27



Like Low Density Residential land, new housing development on Vacant and Partially Vacant Medium Density Residential land has been slower than anticipated on average over the monitoring period as shown on Figure 27. If trends continue, the total housing capacity anticipated on Medium Density land would barely be met by 2032 but only if new housing on Developed land continues at its higher than anticipated pace. The slow pace of Vacant and Partially Vacant Medium Density land is likely due to similar issues with proximity to services. According to the 2021 BLI rerun approximately 23% of Vacant and Partially Vacant land designated as Medium Density Residential is unannexed, including a large portion of the Crow Road area that is designated for Medium Density Residential. In addition, about 13% of the

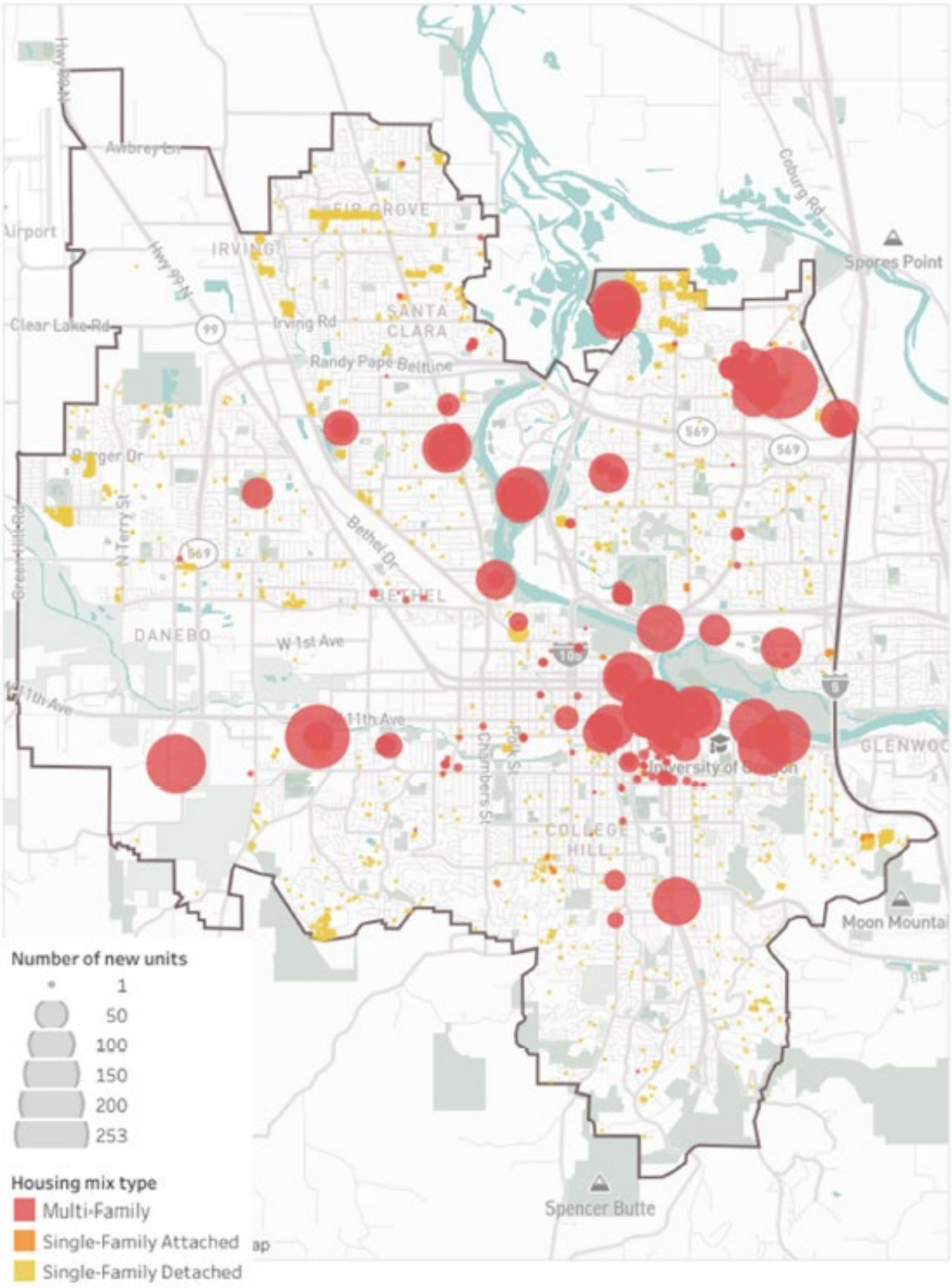
housing need on Medium Density Residential land is anticipated from the R-2 zone minimum density increase, which as addressed previously, has not yet been realized.

Also shown on Figure 27, new housing development on High Density Residential Vacant and Partially Vacant lands and on Commercial Vacant and Developed lands has been higher on average than expected during the monitoring period. More than half of the total new dwellings on Developed land have been on Commercial land and 97% of the new housing on Commercial has been 5+ dwelling types, which had the highest average density (82.8 dwellings per net acre). On average, new housing developments on Commercial land had the highest density (82.8 dwellings per net acre) compared to other plan designations.

(For more information and data sources on this topic section, see:
Appendix D: Housing Development Data, section Housing Development and section Housing Development Buildable Lands Impact)

Net New Dwellings Permit Locations

Issued building permits, 12/2012-7/21/21. Some dots overlap at this scale.



Yogi Tea headquarters, one of the largest employment developments during the monitoring period. Photo provided by Yogi Tea.

IX. Employment Development Metrics

Employment development metrics look at building permit activity for new employment buildings and development, how much and what type of land new employment development is being built on, and whether efficiency measures have been used for the new development. This section includes key questions and key metrics related to measuring the development of land with buildings, parking and related development for employment uses. The building permit data does not include data on actual job creation which is discussed under section VII. General Metrics, Snapshot - Job Growth.

Key Questions –Employment Development General

Land Supply: Employment Development General

KEY QUESTIONS	SUB-QUESTIONS	KEY INDICATORS
What has been the employment building permit activity?	• How many permits? • Type of permits?	• Number of new dwellings by structure type • Population
Has there been new employment development in industrial UGB expansion areas?	• How many large industrial sites have developed? • What size class?*	• Number of new dwellings by structure type

* The Envision Eugene Comprehensive Plan identified Eugene's long-term need for a specific number of large industrial sites in specific size ranges, referred to as the Industrial "large lot portfolio."

Snapshot – Employment Development General

Over the 2013-2021 monitoring period,[39] there was an average of 37 employment permits per year. Commercial non-retail was the employment subcategory with the greatest number of building permits over this period. Despite the COVID-19 pandemic, 2020 had the largest number of employment permits during the monitoring period, many in the Government or Semi-Public category, including permits at many local schools, Autzen Stadium, and Echo Hollow pool. The number of employment permits was not an adopted metric in the UGB analysis; however, it will be helpful to monitor development trends in the future. Currently, the Clear Lake UGB expansion area in Northwest Eugene is mostly not served with the infrastructure needed for annexation and development. Over the monitoring period, none of the industrial sites in the Clear Lake area large lot portfolio were developed. As part of the UGB adoption, it was anticipated that this area would provide about 3,000 jobs. The City recently performed a fiscal analysis to determine potential methods to fund infrastructure improvements and city services for the area. Once served, more of the area will be eligible for annexation. Employment development in the UGB expansion area will be further assessed after annexation.

As it relates to employment development, employees per acre (EPA), or density of employment, is used in the UGB analysis to determine the amount of land needed to accommodate job growth. The projected job growth for each employment category of commercial non-retail, retail and industrial is identified and is divided by the applicable EPA, resulting in the amount of land needed to accommodate development for those jobs (e.g., new retail jobs divided by retail EPA is acres needed to accommodate growth). Overall, jobs have generally been occurring at the same densities[40] as the Adopted Forecast.

(For more information and data sources on this topic section, see:
Appendix F: Employment Development Data, section Employment Building Permits)

[39] As discussed further in Appendix F Employment Development Data, monitoring data for employment building permits starts in 2013 rather than 2012 because earlier permits are already reflected on the Buildable Lands Inventory. The monitoring data is through mid-2021, however, averages are calculated only from full year data, in this case 2013-2020.

[40] The density of employment is expressed as the employees per acres (EPA) and is the number of existing covered employees (jobs) at a point in time divided by the acres of a site.

Key Questions – Employment Development: Efficiency Measures

Land Supply: Commercial and Industrial

KEY QUESTIONS	SUB-QUESTIONS	KEY INDICATORS
Have the efficiency measures been successful to create development for jobs?	• How much development for commercial uses has been added in the areas designated as Campus Industrial? • How much development for commercial uses has been added in West Eugene? • How much development for commercial uses has been added from efficiency measures? • How many industrial sites have been created through parcel assembly? • How many sites have been addressed through brownfield assessment? • How much new employment development utilized efficiency measures?	• Amount of redevelopment on Commercial lands • Which efficiency measures have been used • Acres and size of industrial sites created through parcel assembly • Acres addressed through Brownfield program and development on sites • Amount of employment building capacity added

Snapshot – Employment Development: Efficiency Measures

Have the efficiency measures (or compact development strategies) for employment development been successful?

As part of the Envision Eugene process and UGB adoption, the City adopted or counted on the following efficiency strategies to increase the productivity of employment lands within the UGB:

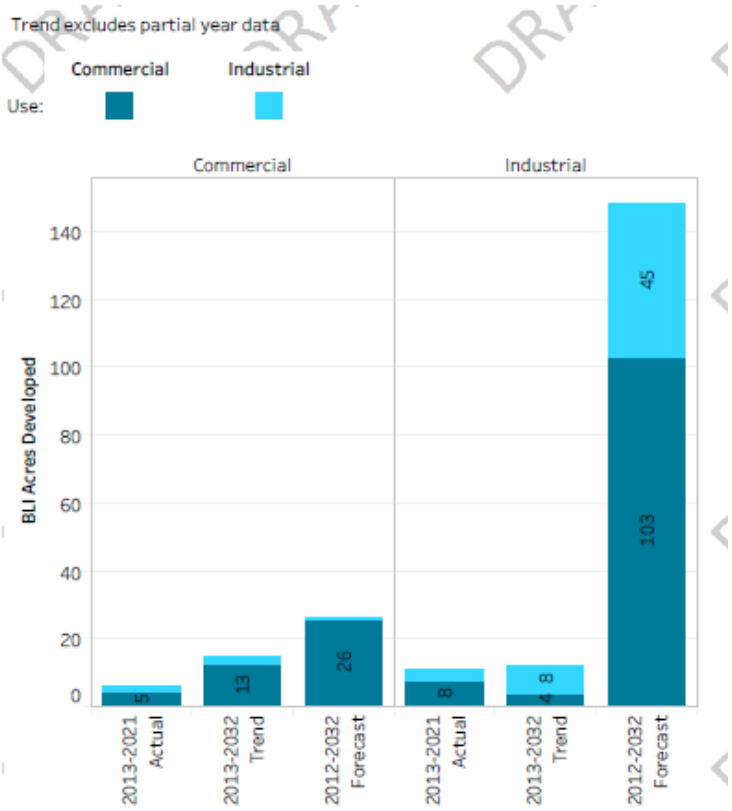
- Facilitate more employment development **downtown** through a multifaceted programmatic approach including land use regulation changes, facilitation, and financial incentives
- Changed the **comprehensive plan designation** of a 10.3-acre portion of the Crow Road area to Commercial
- Incentivize employment development through a **Brownfield Assessment** program
- Incentivize commercial non-retail development by amending land use regulations to remove barriers in the new **E-1 Campus Employment Zone**
- Incentivize commercial retail development by amending land use regulations to remove barriers in the new **E-2 Mixed Use Employment Zone**
- Incentivize employment development through financial incentives in the **Enterprise Zone** (not formally adopted as an efficiency measure)

Overall, efficiency measures for employment development have not yet succeeded in spurring additional employment development as intended. The number of acres developed with employment permits utilizing efficiency measures during the 2013-2021 monitoring period is well below the forecast for each adopted efficiency measure and none are on track to meet the forecasts. The forecast for each efficiency measure assumed the BLI category on which the efficiency measure acres would be developed, as well as the use (commercial, industrial, or both).[41] The slow development of land with employment efficiency measures could in part be because there were higher building vacancies at the end of the 2007-2009 recession that have been re-populating during the monitoring period.

A total of 17 acres of employment development utilized efficiency measures between 2013-2021 from only three of the employment efficiency measures. A total of 279 acres[42] were developed for employment, meaning acres developed with efficiency

Figure 29

Acres Developed with Employment Efficiency Measures by Plan Designation



Sources:
2013-2032 Trend: City of Eugene Planning and Development Department, building permits and Community Development databases
2012-2032 Adopted Forecast: City of Eugene Planning and Development Department
2013-2021 Actual: City of Eugene Planning and Development Department, building permits and Community Development databases

[41] For example, for the E-1 Campus Employment Zone efficiency measure it was assumed that the new commercial development would happen on Vacant land, but there may be more development occurring on Vacant or Partially Vacant land that is not being monitored as efficiency measure development.

[42] There was a small amount (11.49 acres) of additional employment development from miscellaneous permits, which were not included in this employment development total. See *Additional Developed Acres for Employment Development from Miscellaneous Permits* in the Appendix F for more detail.

measures accounted for only 6% of total employment acres developed.[43] The most utilized efficiency measure area was new employment development in the Enterprise Zone, totaling 12 of the 17 employment acres developed with efficiency measures. The second most utilized efficiency measure area was the Downtown Plan Area, which had 4 acres develop. One acre was developed in the E-1 Campus Employment Zone.

Despite this, job growth continues in the community at a faster rate than anticipated. The lack of developing acres could mean that more employment infilled into existing buildings after 2012 since it was at the end of a recession.

Have efficiency measures for Commercial land been successful?

Efficiency measures for employment development on land designated Commercial were utilized very little. A total of 26 acres of Commercial land was forecast to be developed with commercial uses that utilized efficiency measures. In comparison, from 2013-2021, six Commercial land acres were developed with employment development utilizing efficiency measures, which includes five acres with commercial uses and one acre with industrial uses. New employment development in the downtown efficiency measure area accounts for four of these acres and development in the Enterprise Zone accounts for two acres. Neither of the Urban Renewal District financial incentives (Downtown and Riverfront) were utilized to develop any Commercial land, although a small amount of new commercial development is anticipated in the Riverfront Urban Renewal District with future development of the riverfront. The 10 acres of land redesignated from Medium Density Residential to Commercial in the Crow Road area has not developed because this area is not yet served with utilities needed for annexation and development.

Have efficiency measures for Industrial land been successful?

As with Commercial land, efficiency measures did not result in much development on Industrial designated land. During the 2012-2032 planning period, it was forecast that 45 acres with industrial uses and 103 acres with commercial uses would be developed using efficiency measures on Industrial land. From 2013-2021, three acres with industrial uses and eight acres with commercial uses were developed using efficiency measures on Industrial land.

Of the 11 acres of employment development that utilized efficiency measures on Industrial land, ten of those occurred in the Enterprise Zone, with the remaining acre in the E-1 Campus Employment Zone. New employment development did not occur on Brownfield Assessment

[43] For mixed-use buildings, the BLI impact is attributed to the dominate use of the building unless easily divisible between each use (e.g., each use takes up a clear portion of the building/development site, or the building is divided vertically between uses). Often mixed-use buildings were primarily apartments with employment uses on the ground floor, in those cases zero BLI impacted acres were attributed to the employment use.

sites or in the E-2 Mixed Use Employment Zone during the monitoring period on Industrial designated land.

(For more information and data sources on this topic section, see:
Appendix F: Employment Development Data, section Employment Building Permits from Efficiency Measures)

Key Questions – Employment Development: Land Supply

Land Supply: Commercial and Industrial

KEY QUESTIONS	SUB-QUESTIONS	KEY INDICATORS
Has land for employment development been developing at the anticipated rate?	• What percent of Vacant land has been built on? • What percent of Industrial Vacant land has been built on by size class? • What percent of Partially Vacant land has been built on? • What are job densities? • What percent of anticipated redevelopment has occurred on employment land? • What percent of anticipated "other uses" (non-employment) have occurred on employment land?	• Acres of Vacant land in supply • Acres of Partially Vacant land in supply • Amount of building capacity added • Amount of redevelopment on employment lands • Acres of other use: land purchased for parks, land developed with infrastructure, University of Oregon, or housing
Have new regulations gone into place that have an effect on the buildable lands supply?		• Acres lost/gained in buildable lands supply due to new regulations
Has the extension of infrastructure increased the amount of land available for employment development?	• Inside the UGB? • Inside the UGB expansion area? • Does at least 25% of our employment land qualify as short-term supply* (e.g., ready for construction within a year)?	• Capacity of lands newly served by infrastructure • Acres served since 2012 and average capacity assumed, by plan designation and BLI category • Acres qualify as short-term supply

*"Short-term Supply of Land" means suitable land that is ready for construction within one year of an application for a building permit or request for service extension. Engineering feasibility is sufficient to qualify land for the short-term supply of land, funding availability is not required. OAR 660-009-0005 Definitions, https://secure.sos.state.or.us/oard/displayDivisionRules.action?selectedDivision=3059

Snapshot – Employment Development Land Supply

Has land for employment development been developed at the anticipated rate?

Over the monitoring period, 279 acres were developed from employment building permits, which is only 19% of the 1,457 acres forecast to develop with employment between 2012-

2032.[44] If this trend continues, the forecast amount of development will not be met by 2032. Employment development has occurred on a mix of land types, with Committed[45] having the highest amount of acres developed with employment uses, then Developed land, then Vacant land. Employment development has also occurred on a mix of plan designations, including on government and residential plan designations for schools and parks. Development of land below the forecast in total acres, and below the forecast for Vacant land, is due in part to the fact that almost 500 acres of the forecast is Vacant land in the Clear Lake UGB expansion area which is mostly not served with infrastructure and therefore not yet annexed and available for development.

Has Commercial land developed with employment development at the anticipated rate?

A total of 59 acres of Commercial plan designated land developed from employment building permits, or seven acres on average annually, which is well below the forecast pace of 12.9 acres developing annually. Most of the development has been on Developed Commercial land, compared to the forecast which assumed most development would be on Vacant land. Redevelopment policies and trends towards online retail purchasing (that could result in lower demand for physical retail buildings) may be influencing the low number of acres developed. On the other hand, job growth in retail and commercial non-retail, including businesses that need physical buildings, has continued in Eugene through 2018 so it is unclear if the lower number of acres developed is of concern since it appears that those needs are being met at least to some degree. Additionally, more housing has been built on Vacant Commercial land than anticipated.

There has been little change over the monitoring period in the amount of Commercial land supply that is readily available for development. According to the 2021 BLI rerun, about the same amount of the Vacant and Partially Vacant Commercial land in the adopted land supply is unannexed (25 acres, 24%) and was identified as not served with utilities in 2012 as part of the UGB analysis.

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[44] The total acres of Developed land that was developed with employment permits includes acres from new buildings and additions but also acres from development that was not a building (new parking lot) and acres from new buildings with demolitions where the net change in building footprint was zero or less. Because the Developed acres amount could not be filtered to exclude acres from developments with a net decrease in building square feet while also not filtering out development from parking lots, ballfields, etc., the amount of Developed acres that developed is an overestimate.

[45] Committed land is devoted to special uses like parks, schools, government offices, cemeteries, and rights-of-way and therefore has no development or redevelopment potential. See section XIII. References, Definitions, Glossary for Buildable Lands Inventory definitions.

Has Industrial land developed with employment development at the anticipated rate?

Land in the Industrial plan designation experienced the highest amount of development from employment permits (118 acres) and the highest annual average number of acres developed with new employment permits at 13.9 acres but was still well below the forecast of 57 acres annually. Over the monitoring period none of the "large lot" industrial supply developed, though almost half of those sites are in the Clear Lake UGB expansion area which is not yet served with the utilities needed for development. In addition, it is noted that planning for industrial land needs is different than planning land for housing or even commercial uses, often needing more options of land with different characteristics (sizes and zones) and takes longer to develop.

Like Commercial land, over the monitoring period there has been little change in the amount of the Industrial land supply that is readily available for development. About the same amount of Vacant and Partially Vacant Heavy Industrial land is unannexed and was identified as not served with infrastructure in 2012. Unannexed land in both Campus Industrial (112 acres) and Light Medium Industrial (654 acres) increased substantially (compared to the 163 acres combined identified as not served in 2012) when the UGB was expanded to add about 589 developable acres of Vacant and Partially Vacant Industrial land in the Clear Lake UGB expansion area that, as noted earlier, are currently not served with the utilities necessary for annexation.

How has employment development on other types of land developed?

Land designated for Government & Education uses experienced the same amount of land developed (56 acres) with employment uses as Commercial land. This was almost entirely on land that was already identified as Committed in the BLI for schools and parks which is consistent with the adopted assumption that most new public facilities would occur on existing publicly owned land. The forecast assumed some employment uses (other than public uses) would develop about 53 acres of residentially designated land, such as for neighborhood commercial uses like stores or cafes. Over the monitoring period, 15 acres of residentially designated land has developed with employment uses. New employment development on Low and Medium Density Residential land is below the forecast and almost 9 acres is from one project (Civic Park/Kidsports Fieldhouse).

(For more information and data sources on this topic section, see:
Appendix F: Employment Development Data, section Employment Development Buildable Lands Impact)

Have employment densities changed?

While not derived from building permit data, employment density (the number of employees per acre or EPA) helps determine the amount of land needed to accommodate developments for job growth. In 2018, commercial non-retail, retail, and industrial job densities for sample areas in Eugene were all similar to the adopted assumptions for each category (which was based on 2006 data, pre-2007-2009 recession from these same sample areas).

(For more information and data sources on this topic section, see:
Appendix F: Employment Development Data, section Employees Per Acre)

New Employment Development Permit Locations

Issued building permits, 12/2012-7/21/21. Some dots overlap at this scale.

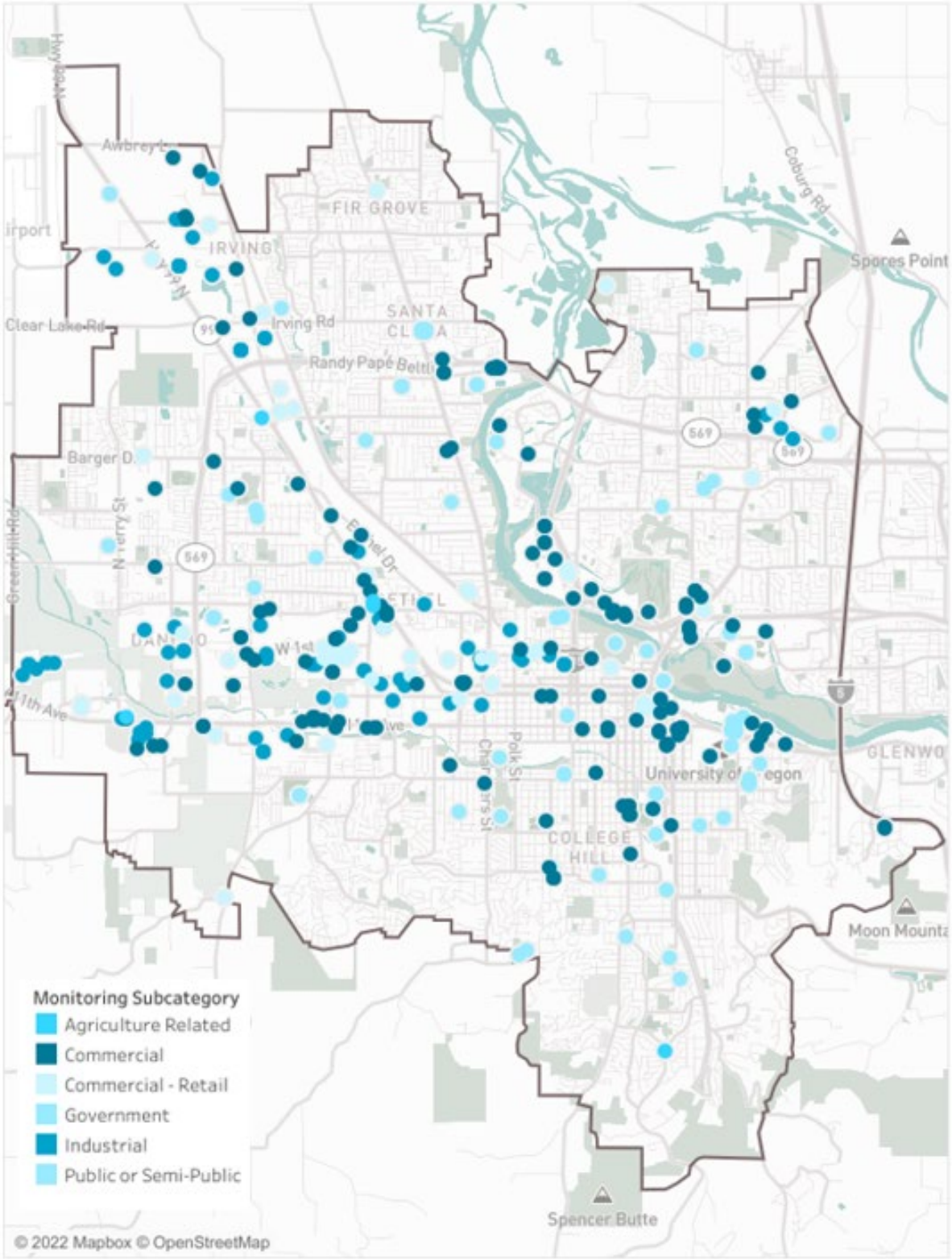

Photo by Vern Rogers

X. Other Metrics

This section will include other metrics that are not direct inputs into the UGB analysis but help inform growth management policies.

Snapshot – Other Metrics

There are other metrics that provide important information about how the community is growing that are not direct inputs into UGB analysis or the land and supply model, but that help inform growth management policies. Questions related to "qualitative" data are more subjective and related to the experience of our residents. For example, has the community experienced improved access for residents to shops and services in "20-minute neighborhoods?" How are changes related to development and growth affecting quality of life? Although the Growth Monitoring Program will examine both kinds of questions in upcoming phases of the program, at this point in the monitoring program development this report relates mostly to the program's efforts to collect and share "quantitative" data.

Microduct installation in Downtown Eugene.
Photo by City of Eugene staff.

XI. Buildable Lands Inventory Update Summary

The Buildable Lands Inventory (BLI) assesses Eugene's land supply for development capacity, categorizing land by its development potential, including Vacant (or undeveloped), Partially Vacant, Developed, Committed and Protected, creating an inventory of Eugene's buildable land supply that is anticipated to accommodate new growth. The City's adopted BLI, developed in 2012, reflects the demand and capacity projections for 2012-2032 and was adopted as part of the previous UGB analysis (see section XIII References, Definitions, Glossary for further definition of BLI and UGB analysis). For the purposes of monitoring the status of Eugene's land supply, the BLI model (a location-based spatial model) was rerun in 2021 to create a monitoring snapshot of the status of the adopted BLI at the end of the monitoring period (e.g., "2021 BLI"). The data from building permits quantifies how much land has been developed and at what rate, but due to changes in data sources and methodologies, the best way to get an understanding of the state of the land inventory is to rerun the BLI model. The purpose of the 2021 BLI is to complete a high-level analysis of what the land demand would be using the monitoring results and determine whether the BLI today has enough land to meet the updated demand. This preliminary estimate and 2021 BLI are provided for the purposes of monitoring and are not intended to be adopted by the City, such as in association with any new UGB analysis.

(For more information and data sources on this topic section, see:
Appendix I: Buildable Lands Inventory Update for details on the BLI update process and capacity analysis.)

2021 Residential Capacity Estimate

The 2021 BLI and land demand model found that, using a combination of updated assumptions from monitoring results and previously adopted assumptions, preliminarily there is capacity for about 12,000 dwellings[46] on Vacant and Partially Vacant residentially designated land within the UGB as of January 2021 (not accounting for development that has happened since the 2021 BLI was rerun as of January 1, 2021). The density assumptions for the capacity estimate were updated where there was enough data to do so, otherwise the adopted assumptions from the adopted 2012-2032 UGB analysis were used. Redevelopment estimates were not used for this snapshot.

Recent changes in state law regarding middle housing allow for a city to assume an increase of up to 3% of additional housing capacity in undeveloped and underdeveloped areas through increased density assumptions.[47] If capacity in the 2021 BLI was increased up to 3% applied to the density assumption for Low and Medium Density Residential designated lands (where middle housing is most likely to occur), there would be an additional capacity of 350 dwellings. How much additional capacity to assume as a result of the middle housing code amendments will be further analyzed at the time of the next UGB analysis.

2021 Employment Capacity Estimate

The 2021 BLI and land demand models found that, using a combination of updated assumptions from monitoring results and previously adopted assumptions, preliminarily there is capacity for more than 18,700 jobs on Vacant and Partially Vacant employment designated land in the UGB as of January 2021 (not accounting for development that has happened since the 2021 BLI was rerun). Redevelopment estimates were not used.

2021 Land Supply Characteristics

Regarding the availability of land to develop, often unannexed land does not have the utilities close enough to allow annexation and realize the development potential. For example, the Crow Road area is about 158 acres of unannexed developable land (mostly Low Density and

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[46] Note that this is the preliminary estimate of capacity for new dwellings based on the buildable land in the 2021 BLI developed as a snapshot for monitoring the status of the land inventory, this is not the number of new dwellings being planned for nor is it the number of new dwellings planned for in the adopted 2012-2032 housing needs analysis.

[47] Increased density assumptions can help estimate the impacts of increased middle housing development expected as cities adopt middle housing code changes to comply with HB 2001. Local governments may project an increase in anticipated middle housing residential development above the 3% threshold for undeveloped or underdeveloped areas if it provides quantifiable validation of such an increase. See the Oregon Administrative Rule for more information. OAR 660-046-0330, Parameters, https://secure.sos.state.or.us/oard/viewSingleRule.action?ruleVrsnRsn=272316

Medium Density Residential with a small portion of Commercial) and lacks the infrastructure necessary to support substantial new development.[48] As shown in Figure 31, in the 2021 BLI, **approximately 40% (829 acres) of the Low and Medium Density Residential buildable land supply is unannexed** which likely means that a large portion of that is not served with the utilities necessary to annex and realize the development potential. Similarly, **63% of Industrial buildable land is unannexed**, a large portion of which (589 developable acres of Vacant and Partially Vacant Industrial land) is the Clear Lake UGB expansion area which is mostly not served with utilities necessary to annex. Extending major infrastructure to provide utilities is very costly and is typically a barrier to development in unserved areas.

Figure 31, Developed and Undeveloped Lands, Eugene 2021

Type of Land	Developed Acres[1]	Undeveloped/ Buildable Acres[2]	Percent of Undeveloped Acres that are Unannexed[3]
Residential Lands	**12,593**	**2,083**	**40%**
Low Density Residential	11,118	1,853	42%
Medium Density Residential	1,066	195	23%
Medium Density Residential Mixed Use	37	1	0%
High Density Residential	354	33	1%
High Density Residential Mixed Use	17	2	0%
Employment Lands	**4,191**	**1,468**	**58%**
Commercial Total	1,408	103	24%
Commercial	1,101	92	27%
Commercial Mixed Use	55	4	0%
Major Retail Center	192	2	0%
Mixed Use	60	5	0%
Industrial Total	2,523	1,318	63%
Campus Industrial	260	313	36%
Light Medium Industrial	1,332	773	85%
Heavy Industrial	930	231	25%
Special Heavy Industrial	-	-	-
Government & Education	21	1	0%
University Research	7	-	0%
Parks and Open Space	232	47	9%
Parks/Open Space Mixed Use	-	-	0%
Other Plan Designations	**2**	**6**	**35%**

[48] For instance, according to GIS data, no new dwellings have developed in the Crow Road areas since the 2012-2032 BLI was completed.

Total	16,786	3,557	47%

[1] Developed Acres includes fully developed land and the portions of Partially Vacant land containing development.
[2] Undeveloped Acres includes completely undeveloped land and the undeveloped portions of Partially Vacant land.
[3] Only 133.6 of the 1,686 undeveloped/buildable acres that are unannexed are in River Road or Santa Clara (8%).

The land supply is also broken down into the size of the lot and whether the lot is less than 5% slope or at 5% slope or greater.[49] As documented in the Appendix I: Buildable Lands Inventory Update and shown on Figure 32 and Figure 33, in the 2021 BLI 57% of the residential Vacant and Partially Vacant land supply (44% of the capacity) is on 5% or greater slope and 54% of the residential Vacant and Partially Vacant land supply (59% of the capacity) is on lots less than 5 acres.

It is important to note that a buildable lands inventory analysis is governed by state land use law. This includes which land must be counted as buildable land, suitable and available for development, and limitations on which land can be considered not available for future development such as because it is protected (e.g., for natural resources) or is committed to public use.

Figure 32. Estimated buildable acreage on Vacant and Partially Vacant residential lands by category of land, 2021

Lot size	Acres in < 5% slope (percent of this lot size group)	Acres in ≥ 5% slope (percent of this lot size group)	Total acres[50] (percent of Total)
< 1 acre	164 (44%)	213 (56%)	377 (18%)
1 - 5 acres	346 (47%)	390 (53%)	736 (36%)
5+ acres	384 (41%)	560 (59%)	945 (46%)
Total (percent of total)	894 (43%)	1,164 (57%)	2,058

[49] The previous UGB analysis found 5% slope to be a notable break in amount of new development with little difference identified at higher slope intervals.
[50] Buildable acres of undeveloped Low Density Residential lots smaller than 4,500 square feet are excluded from this table because they were below the threshold size for assigning residential capacity. The minimum lot size in R-1 Low Density Residential of 4,500 square feet, from the current land use code, was used as a proxy for the threshold of a buildable lot size in Low Density Residential plan designations.

Figure 33. Estimated housing potential in dwellings on Vacant and Partially Vacant residential lands by category of land, 2021

Lot size	< 5% slope (percent of group)	≥ 5% slope (percent of group)	Total (percent of Total)
< 1 acre	1,585 (54%)	1,351 (46%)	2,935 (24%)
1 - 5 acres	2,658 (63%)	1,573 (37%)	4,231 (35%)
5+ acres	2,576 (53%)	2,286 (47%)	4,862 (40%)
Total (percent of total)	6,819 (57%)	5,210 (43%)	12,029

2021 Demand and Supply

During the next UGB analysis process, further discussion and analysis will determine which demand assumptions should be updated using monitoring results and which assumptions have not changed. In addition, the BLI will also be rerun again to bring the land supply estimates up to date. However, for the purposes of monitoring, to get a high-level understanding of how Eugene's future demand may have changed for the next 20 years (2021-2041) compared to the previously adopted assumptions (2012-2032), some of the key monitoring results were incorporated into a UGB land demand and supply sufficiency model[51] while maintaining (not updating) the majority of the other adopted assumptions (vacancy rate, housing mix, redevelopment estimates). The key demand assumptions that were updated to get this high-level estimate of future demand include:

- For **residential development**: population growth (from 2021 PSU forecast), persons per household and persons in group quarters (from 2019 ACS), some but not all housing densities (from 2012-2021 new housing)
- For **employment development**: employment growth (mid-point of currently adopted growth rate and 2019 OED forecast), employment densities (from 2018 Oregon Employment Department employment), omitted estimate for some new employment to re-populate in existing buildings

This produced a preliminary updated estimate of demand for the next 20 years (2021-2041) for about 15,700 new dwellings and about 24,800 new jobs.[52] This is only a *preliminary* estimate

[51] Technical spreadsheets that include the assumptions affecting the sufficiency of Eugene's 20-year land supply to estimate the sufficiency of Eugene's land supply compared to the projected land demand.

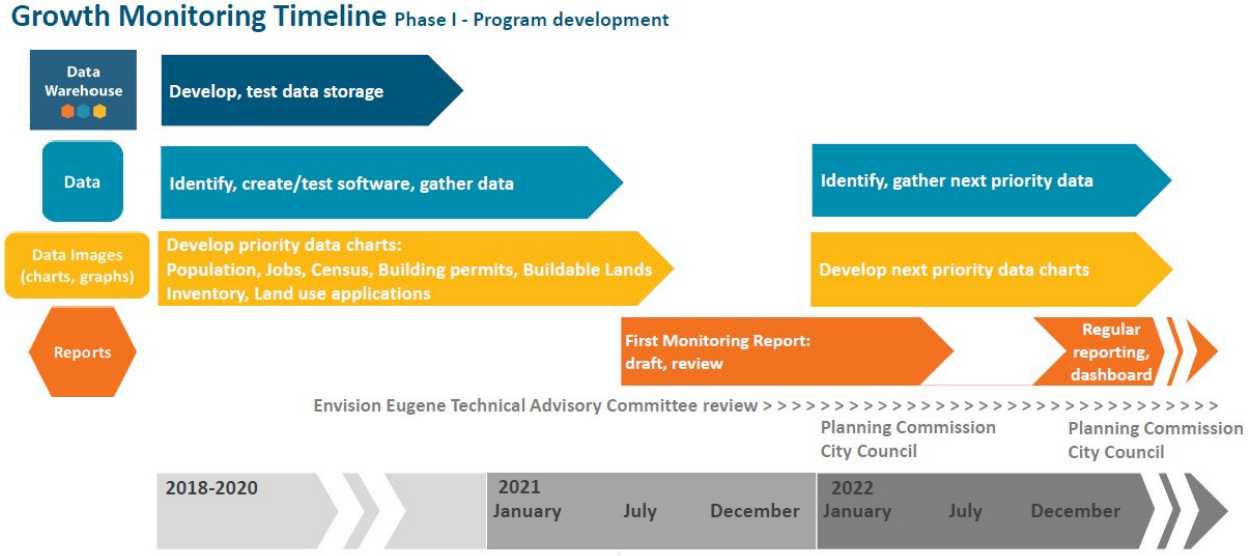
[52] As noted earlier, employment densities are used in the UGB analysis to determine the amount of land needed to accommodate job growth. The projected job growth is identified and is divided by the applicable Employees Per Acre (EPA) resulting in the amount of land needed to accommodate those jobs (e.g., new retail jobs divided by retail EPA is the acres needed to accommodate projected growth).

because the future UGB analysis will have to use new state land use rules for how demand is calculated that were not incorporated here. Also, the jobs projection is only for new jobs covered by unemployment insurance ("covered jobs") because covered job data is more readily available, but future UGB analysis will need to consider planning for all new jobs (jobs covered by unemployment insurance plus jobs not covered).

Comparing the (preliminary) updated 2021 demand to the 2021 BLI Vacant and Partially Vacant capacity, if the next UGB analysis started today *preliminary* estimates indicate that there would be a shortage of land in the UGB for housing (particularly on Medium Density Residential and High Density Residential land) and for jobs (particularly on Commercial land). However, these are high-level estimates that will be further refined during the next UGB analysis. These preliminary estimates of demand for land and the capacity of land will change when accounting for additional land needs (e.g., parks and utilities), updating the land demand assumptions (e.g., new growth forecasts, total job demand, housing mix) and updating land capacity assumptions (e.g., redevelopment, density). Additionally, the State's recent revisions to the housing needs analysis rules and the rule-making process that is underway for climate-friendly and equitable communities is likely to change how transportation and housing planning is analyzed during the next UGB analysis.

XII. Next Steps / Timeline

Figure 34



Phase I

The Growth Monitoring Program has two development phases. As shown in Figure 34, this phase of the program development has been primarily focused on developing the integrated system for the quantitative monitoring and reporting. The next steps include finishing the collection and reporting pieces for the next priority of quantitative metrics, such as data by zone and at the neighborhood level. The next important component to the system is developing a community dashboard, to make the data easier to consume and to access. The first annual growth monitoring report will also need to be developed, which is anticipated for the beginning of 2023.

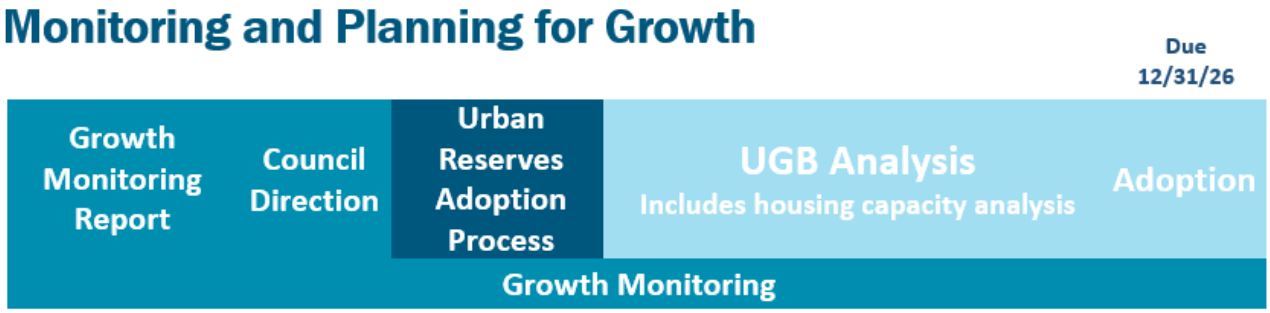
Phase II

After the Phase I quantitative collection system is established, focus can turn to developing the qualitative part of the program, yet to be fully scoped.

Ongoing

This report, as well as future reports, will be considered by the Planning Commission and City Council. As shown in Figure 35, while other growth management projects continue like Urban Reserves, or begin like a new UGB analysis, the Growth Monitoring Program will continue with regular data collection and reporting. The results of growth monitoring can help inform the next UGB analysis and other planning related projects in the future.

Figure 35



(For more information on this topic section, see:
Appendix B: Collection and Reporting System)

Photo by City of Eugene staff.

XIII. References, Definitions, Glossary

Adopted Forecast Many of the charts include an Adopted Forecast. The "Adopted Forecast (2012-2032)" is the adopted estimate (e.g., of new dwellings) or assumption (e.g., density of new housing) projected for the 2012-2032 planning period. The Adopted Forecast can be a total for 20 years or an average over 20 years. The Adopted Forecast is from the City of Eugene's Planning and Development Department's adopted Envision Eugene Land Sufficiency Model (2017) and as adopted in the Envision Eugene Residential and Employment Land Supply Studies 2012-2032.

Affordable Housing (sometimes called "income qualified housing") In this report, affordable housing refers to housing that is set aside for households earning no more than 80% of the Area Median Income. Different affordable housing efficiency measures may have different income caps.

Average In this report the average is typically expressed as the average expected over the planning period or achieved over the monitoring period. Many of the building permit charts include an "average," such as an average line or an annual average over the monitoring period. For building permit data, the average is calculated for full year data only so that the average is not artificially low.

Buildable Lands Inventory (BLI) The Buildable Lands Inventory (BLI) assesses the supply of land within the city's UGB for development capacity, categorizing land by its development potential. The BLI land categories are:

Vacant or Undeveloped land has little to no improvements and is not fully Committed or Protected.

Partially Vacant land has development that meets a certain threshold in size and has room for more development.

Developed land contains development and does not have room for more development and is not fully Committed or Protected.

Committed land is devoted to special uses like parks, schools, government offices, cemeteries, and rights-of-way and therefore has no development or redevelopment potential.

Protected land is reserved to protect natural resources or because of natural hazards and therefore is assumed to have no development or redevelopment potential.

(See Appendix I: Buildable Lands Inventory Update Summary for complete definitions)

The **adopted BLI (2012-2032)** model was run in August of 2012, and then was updated in May 2013 to reflect new development that had occurred between the first model run and May 2013. Rather than starting with May 2013 data, to count an entire year's worth of data in monitoring results and reduce error, the monitoring results discussed in this report use a copy of the adopted BLI that rolled back those updates. The monitoring copy of the BLI reflects development that had been issued as of January 2013 so that generally (unless otherwise noted) any development after that date would be included in the monitoring results and counted towards meeting the housing need forecast, any development before January 2013 is assumed already reflected in the BLI with a few exceptions.

The land model was rerun in 2021 to create a monitoring snapshot of the status of the adopted BLI at the end of the monitoring period (e.g., "**2021 BLI**"). This preliminary estimate and 2021 BLI are provided for the purposes of monitoring and are not intended to be adopted by the City such as in association with any new UGB analysis.

BLI plan designation (or just "plan designation") In this report, the BLI plan designation refers to the comprehensive plan designation that was assumed for each parcel at the time the buildable land inventories were developed for the adopted Envision Eugene Residential and Employment Land Supply Studies 2012-2032. The assumed plan designation was identified at that time for the purposes of developing the BLI and long-range planning only, the BLI plan designation does not imply that it is the official plan designation of a parcel, rather it is an estimate derived from the official Eugene-Springfield Metropolitan General Area Plan (Metro Plan) land use diagram. For reporting purposes some Metro Plan designations were combined. For instance, High Density Residential Mixed Use was combined into High

Density Residential, and all Industrial type plan designations (Light, Medium, Heavy and Special Heavy Industrial) were combined into Industrial.

Most charts report by the combined plan designations in the middle column in this table. Some charts report on plan designation at the even higher level of plan designation categories in the first column:

Land Use Categorization for Plan Designation

Plan Designation categories	Plan Designation reporting groups	2012-2032 BLI Plan Designations from Metro Plan
Residential	Low Density Residential	Low Density Residential
	Medium Density Residential	Medium Density Residential
		Medium Density Residential Mixed Use
	High Density Residential	High Density Residential
		High Density Residential Mixed Use
Commercial	Commercial	Commercial
		Commercial Mixed Use
		Mixed Use
		Major Retail Center
Industrial	Industrial	Campus Industrial
		Light Medium Industrial
		Heavy Industrial
		Special Heavy Industrial
Government & Education	Government & Education	University Research
		Government & Education
Parks & Open Space	Parks & Open Space	Parks and Open Space
		Parks and Open Space Mixed Use
		Natural Resource

Efficiency Measures Efficiency measures are actions the City takes to facilitate development that uses land more efficiently than would have occurred without these actions, based on historical trends. Efficiency measures such as changes to the land use regulations to remove development barriers or providing financial incentives, increase the expected capacity of land for additional housing or jobs development beyond what is likely to occur if the City does not make these changes.

Monitoring Period While monitoring data will be collected throughout the entire 20 year adopted planning period (2012-2032), for the purposes of this report the monitoring period is officially the beginning of the planning period (2012) to mid-2021. However, the monitoring period in this report sometimes references a slightly different time frame because of the differences in the availability of data. For instance, as of the writing of this report Eugene's job data was available up to 2018 so this set of monitoring data is 2012-2018. (See Figure 1. Data Source and Collection Years for Monitoring Data Topics in the Introduction).

Trend Many of the building permit charts include a "trend." The "trend (year x – year x)" is the projected amount (e.g., of new dwellings) or projected average (e.g., average density) for the entire 20-year planning period if the development pattern experienced during the monitoring years is continued for the rest of the planning period, to 2032. The trend calculation excludes partial years because there is not a full year's worth of data (e.g., partial year permit data for 2012 and 2021), this avoids an artificially low trend but also means that some data is not being included in the trend estimate.

UGB Analysis This refers to the previous analysis that was completed in association with Eugene's adopted urban growth boundary. The adopted UGB analysis and associated assumptions and estimates for the 20-year planning period are contained in the Envision Eugene Residential Land Supply Study (2012-2032) and the Envision Eugene Employment Land Supply Study (2012-2032). The studies are broken into several parts including buildable lands inventories, housing needs analysis, employment opportunities analysis, efficiency measures and UGB expansion, and are available at https://www.eugene-or.gov/848/Studies-and-Adopted-Plans.

UGB Land Supply and Demand Model Technical spreadsheets that include the assumptions used to estimate the sufficiency of Eugene's land supply for 20 years. Compares the results of the Buildable Lands inventory spatial model to the projected land demands. The **Envision Eugene Land Sufficiency Model (2017)**, was used for the previous UGB analysis.

Zoning Land in Eugene is zoned to provide areas suitable for certain types of development. Each zone provides a set of regulations governing the uses, lot size, building setbacks, height, and other development regulations. However, most of the analysis in this report is provided according to the BLI Plan Designation of the land. The plan designation is the City's long-term plan for what type of development and land uses the land is suitable for and therefore the plan designation is used in long-range planning instead of the zone. Typically, property is zoned to implement the planned uses, but in some cases the zone and the plan designation of a property do not match.

XIV. Emerging Growth Monitoring Issues or Additional Analysis for Outside of the Monitoring Program

During the development and review of this report, the EETAC, staff and consultants identified several issues to be aware of or potentially consider in the future. The following is a list of these "emerging issues," noted in brackets whether the issue is most likely and/or most appropriate to be addressed during future growth monitoring or would need additional analysis outside of the Growth Monitoring Program.

Growth Monitoring:

- PSU's population forecasting does not include a specific modeling component to estimate migration to or from the area due to climate change or anticipated changes. **If PSU's future modeling is revised to specifically address climate migration, Eugene's population forecast could be impacted in either direction.** [Growth Monitoring and future UGB Analysis]
- With Eugene becoming more diverse, **will the 2020 Decennial Census provide more information about renting, owning and income by race and ethnicity?** [Growth Monitoring and future UGB Analysis]
- The **State's housing production strategy rules and the draft Regional Housing Needs Analysis methodology**, or parts of it, **may impact future UGB planning**, particularly regarding housing efficiency measures, estimates for existing underproduction of

housing and planning housing needs for people experiencing homelessness. [Growth Monitoring and future UGB Analysis]

- Over the past several years there have **been changes in state law requiring cities to allow more housing types** to be built in residential areas that allow for detached single-family dwellings. As these changes are fully implemented in Eugene, it **may result in shifts in housing planning as well as terminology and housing mix categories**. [Growth Monitoring and future UGB Analysis]

Future UGB Analysis:

- The **State's Climate-Friendly and Equitable Communities rulemaking** is currently underway and **will impact future transportation and housing planning and monitoring**. [Growth Monitoring and future UGB Analysis]
- Consider **whether housing needs are different than currently planned for** given that the most recent population forecast indicates that between **2020 and 2045 ages 20-24 will continue to make up the largest share** in Lane County's population while the share of the **population over 80+ will double** (from 4% to 8%). [Future UGB Analysis]
- Include **comparisons to other similar cities with colleges/universities as a primary economic engine**, such as regarding median household and median family income. [Future UGB Analysis]
- Additional **sources may need to be explored for self-employed workers to get at "total" employment in Eugene** (workers covered by unemployment insurance and workers that are not). [Future UGB Analysis]
- **If more workers continue working from home than in the past, existing and new spaces for employment and future housing needs may be affected**. [Future UGB Analysis]
- **Employment densities may be impacted by the COVID-19 pandemic, which may affect the amount of land needed** to accommodate job growth. [Future UGB Analysis]
- **Employment densities may be impacted by the COVID-19 pandemic regarding net job growth or decline** within areas within the city. [Future UGB Analysis]
- Additional sources may need to be explored to **understand if there are other reasons that flat land has developed quicker than sloped land, other than it being flat,** such as whether there are code provisions that make sloped land more expensive to build on or lack of infrastructure. [Future UGB Analysis]
- Explore how the effectiveness of residential and employment **efficiency measures impact related compact development actions in the City's Climate Action Plan 2.0**. [Future UGB Analysis and CAP 2.0]

Other Planning-related Efforts:

- Are there **new policy or legislative changes** not discussed here that **may be impacting the housing market or economy that are not "efficiency measures?"** As an example, new legislation that affects renter eviction may be impacting the amount of rental housing stock. Additional rental housing data is needed to assess potential impacts. [Potentially during future UGB Analysis or as part of the Housing Implementation Pipeline]
- **Keeping track of rezoning applications, specifically those intended to make new development possible**, could help inform which zones make new development easier or harder.

"We envision Eugene as a city where future growth is in alignment with the values of the community, supporting the health, wellbeing, and prosperity of all community members."

-Envision Eugene

Envision Eugene Growth Monitoring

Comprehensive Report – *Appendices*

2012-2021

GROWTH MONITORING
PREPARING FOR CHANGE WITH BETTER DATA

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A. Appendices Intro

The Envision Eugene Growth Monitoring Comprehensive Report 2012-2021 and appendices are organized to provide different layers of information, depending on the reader's level of interest. The **Executive Summary** is higher level and pulls all the pieces together into a synopsis. The **Key Questions** and **Snapshots** in the report give a slightly more detailed but still high-level summary about topic areas and include key data and figures. For those wanting a deeper dive, **Appendices A-K** include many more charts and details about data sources, definitions, the relationship of the data to the previously adopted UGB analysis, and chart summaries and takeaways. The Appendices are by topic area which are generally in the same order as the topic areas in the report's Snapshot sections.

B. Appendix: Collection and Reporting System

Monitoring and Planning for Growth

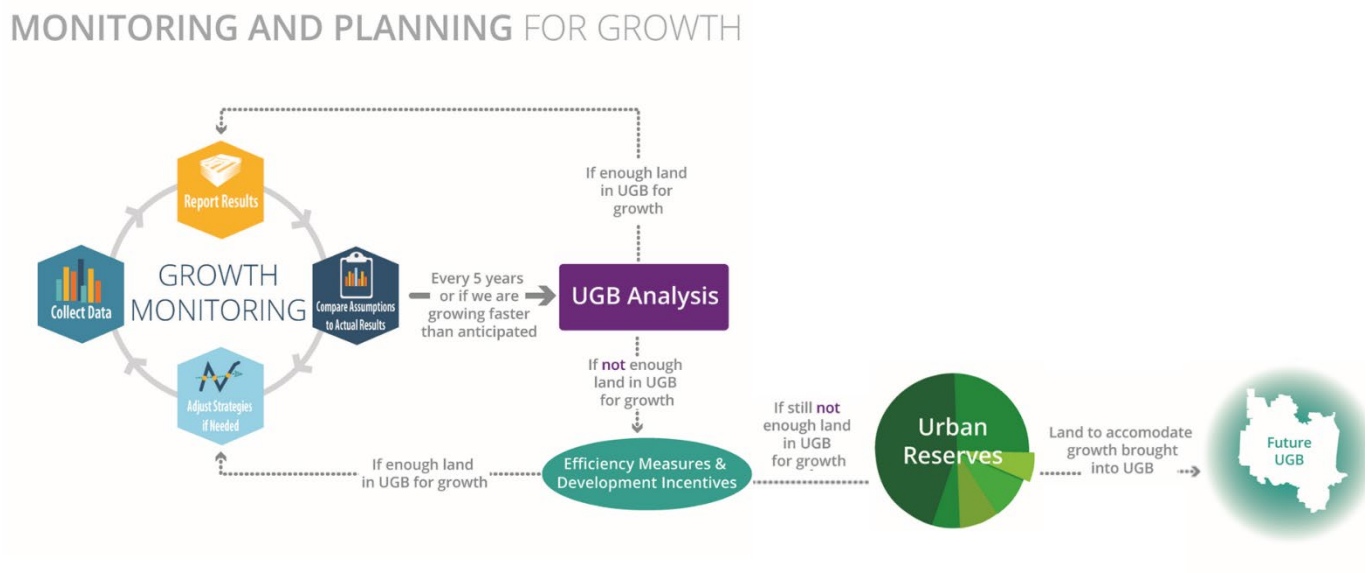
The monitoring program and monitoring cycle play a role in the Planning Division's other growth management work.

The graphic below shows the relationship between the growth monitoring cycle, UGB analysis which plans for how the community grows over 20 years, and Urban Reserves which plans for how the community might grow after 20 years.

Growth monitoring is a cycle that begins with collecting data, reporting results, and then comparing previous assumptions to those monitoring results. If, when those results are compared, there are significant differences to what was anticipated, a new UGB analysis [purple box] can be initiated to see if Eugene still has enough land to meet the community's growth even though the results show that Eugene is developing differently than anticipated.

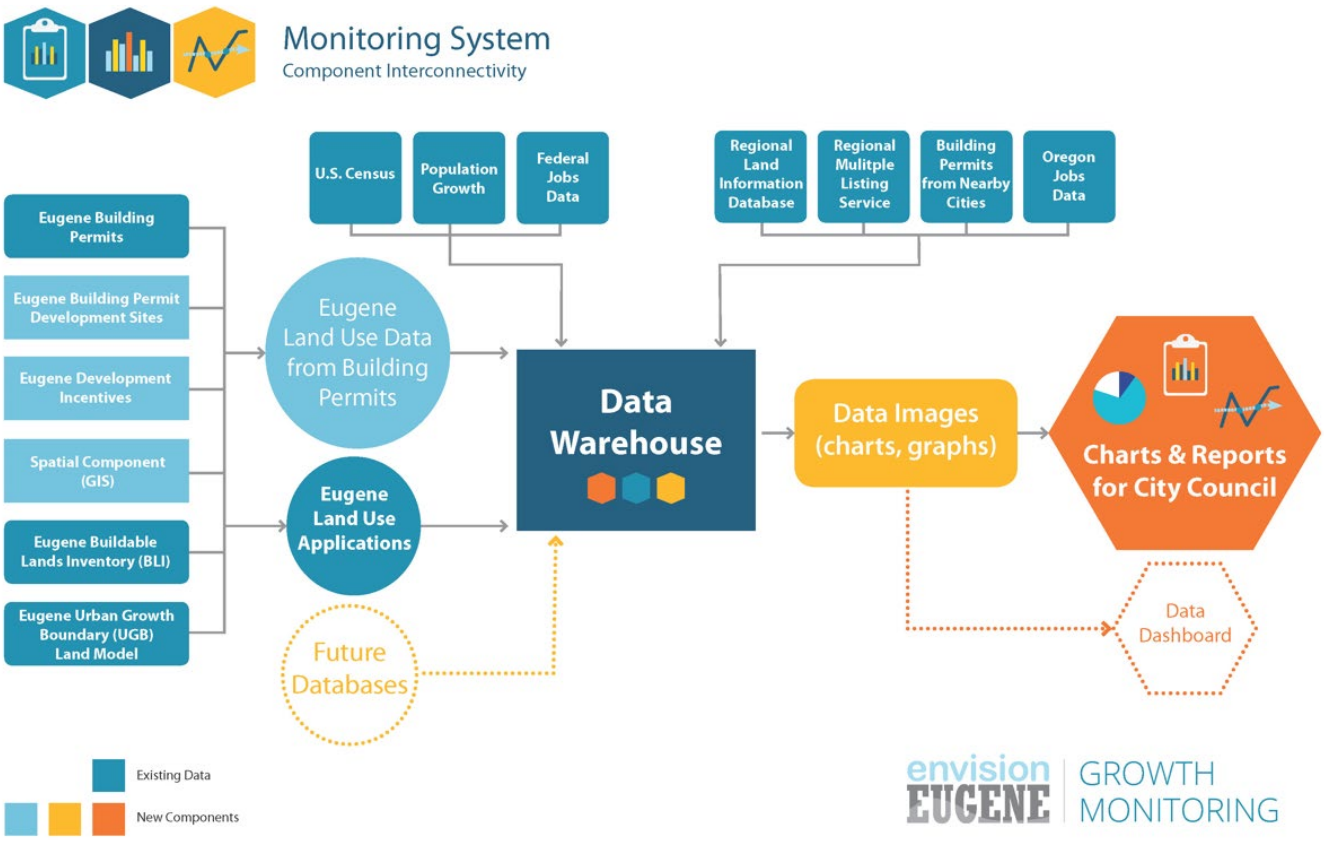
If there is enough land to meet the community's needs for the next 20 years, then no further action is needed and the growth monitoring cycle will continue. However, if the analysis shows that there is not enough land within Eugene's UGB then the City looks at implementing efficiency measures (also called compact development strategies and incentives) [teal oval] to achieve more development than what would be expected without the incentives. If after implementing efficiency measures/incentives there still is not enough land, the City considers expanding its UGB into areas pre-identified as Urban Reserves [in the green circle].

A new factor in growth management planning is that unlike the last time Eugene analyzed its UGB, there is now a state-mandated deadline for Eugene to adopt a new UGB housing analysis by the end of 2026, and then every eight years thereafter. This is a new deadline for completing the "UGB Analysis" part of the process, at least for the City's housing needs. The analysis will include a new study of housing needs and land supply, identifying housing efficiency measures and housing production strategies, as well as determining if a UGB expansion is warranted.



Monitoring System Components

During the Envision Eugene process, it was recognized that Eugene needed a more eloquent way to collect and track data while accounting for the complexities of the data. As depicted in the graphic below, the five main components of the interconnected monitoring system are a database system, data warehouse, data visualization, reports to City Council, and a data dashboard.



Database System

The dark blue squares are all existing data sources ranging from federal, state, regional, and local sources. They include data such as U.S. Census data, state population and jobs, regional real estate data, down to the City's own building permits. These have been siloed databases that previously required manual work to combine data.

The light blue squares are new data sets being compiled to support the program. It was identified early on that there were pieces of data that still needed to be collected but that the City did not have a collection system for, such as land use data. To address this, a spatial component was created to track development on sites over time and to track multiple buildings over a larger development site rather than just individual buildings. This work will benefit monitoring redevelopment trends, such as in downtown, and tracking development when tax lot numbers changes after a lot is subdivided.

Data Warehouse

These data sets are fed into another key component, the newly created data warehouse in the middle square is where data is updated routinely and set up to allow these data sets to be combined.

Data Visualization

The warehoused data is used in a data visualization software called Tableau, which is an industry leader in data visualization and business intelligence. This platform includes development of chart templates, which removes what was once a very manual process and allows for more time to focus on analyzing the monitoring results. Another key piece of this program is focused on data quality. A good chunk of time is being spent cleaning up City data and validating the data to create more confidence in the monitoring results that are delivered to the organization and the public.

Reports

The Tableau charts will go into monitoring reports that the Envision Eugene Technical Advisory Committee (EETAC) and Planning Commission will review prior to being sent to City Council. An annual report will include monitoring results on key data, while a comprehensive report will be completed every five years or as needed.

Data Dashboard

Eventually, the charts will also be included in a data dashboard for the community [dashed hexagon], providing data that has not been available to the general public in an easily accessible, digestible format.

Future…

Future changes and adaptations to the system are also envisioned, to the extent needs arise and resources allow. The system will need to be adjusted over time to reflect the needs for new or different data collection, so the ability to amend the system has been built in, such as for adding different databases in the future.

There will also be a qualitative component to the system, this phase is yet to be fully scoped.

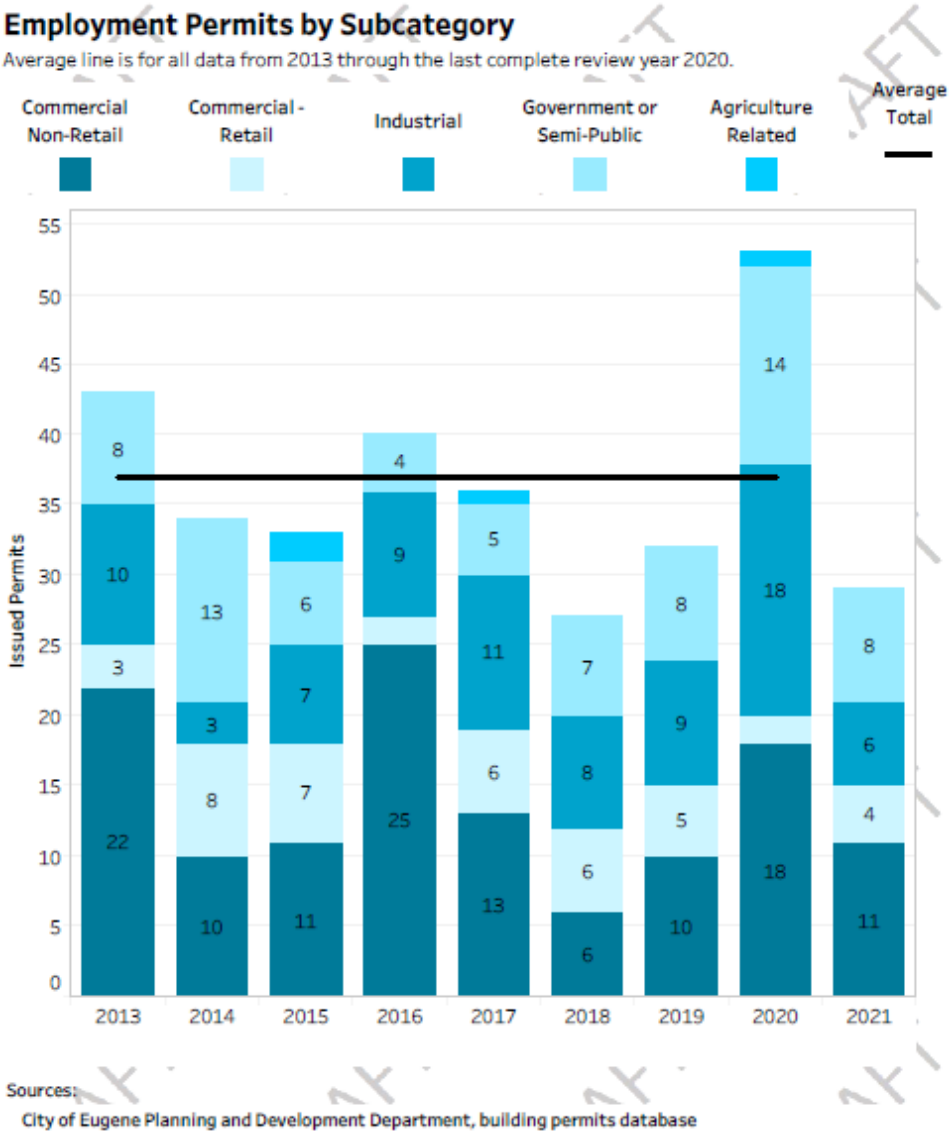
Tips on Reading Data Charts and Graphs

Here are a few helpful tips to keep in mind while reading the charts and graphs throughout the report:

- The legends on the bar charts read from left to right and match the order of the bar categories from bottom to top.
- Typically, the charts and graphs using an **orange color spectrum** are associated with people, housing costs, or housing building development data, while charts and graphs using a **blue color spectrum** are associated with jobs or employment building development.
- Typically, the charts and graphs using a **grey color spectrum** are associated with jurisdictions other than Eugene (e.g., Lane County, Oregon). The grey spectrum can also represent acres of land developed.
- Typically, bars that are filled in with a color represent actual data while bars that are outlined but not filled with color and only include a bar outline represent forecast or trend data.

- Some charts include a grey shaded box around part of the chart, representing historical data before the monitoring period started in 2012.

As an example, the *Employment Permits by Subcategory* chart below uses a blue color spectrum because the data is associated with employment development. The first category in the legend, “Commercial Non-Retail" is the category shown at the bottom of each bar. The second category in the legend, “Commercial-Retail” is the category shown second from the bottom of each bar, etc.



Monitoring Period

The **monitoring period for this report is 2012-2021**, which is the beginning of the planning period (2012) through the writing of this report (mid-2021). However, the monitoring period sometimes references a slightly different time frame because of the differences in the availability of data. For instance, Eugene's job data is currently only available through 2018 (due to additional processing requirements of county data) so the monitoring data for Eugene's jobs is 2012-2018. The table below shows the most common data source and the years that the monitoring data was collected for each main monitoring topic area.

Data Source and Collection Years for Monitoring Data Topics

Data Topic	Source	Monitoring Data Collection Years
Population Estimates & Forecast	**Portland State University Population Research Center**	**2012-2021**
Migration Trends	**Internal Revenue Service, Statistics of Income**	**2011-2019**
Household Demographics	**U.S. Census Bureau, American Community Survey (1-year or 5-year) and the Decennial Census**[1]	**2012-2019**
Housing Affordability	**U.S. Census Bureau, American Community Survey (1-year or 5-year)** **Lane County Assessment and Taxation, Regional Land Information Database** **Redfin.com** **Zillow.com**	**2012-2019** **2012-2021** **2016-2021** **2019**
Jobs	**Oregon Employment Department, Quarterly Census of Employment and Wages**	**2016-2018** (Eugene) **2016-2020** (Lane County)
Jobs Forecast	**Oregon Employment Department**	**2021**
Unemployment Rate	**U.S. Bureau of Labor Statistics, Local Area Unemployment Statistics**	**2012-2021**
Annual Wages/Pay	**U.S. Bureau of Labor Statistics, Local Area Unemployment Statistics**	**2016-2018** (Eugene) **2012-2020** (Lane County, OR)

[1] Data from the U.S. Census is the most comprehensive data available for these data topics, but it should be recognized that this data is missing people that do not feel comfortable responding or identifying with the specific census categories.

Housing Development and Efficiency Measures	**City of Eugene Planning and Development Department**	**late 2012-mid 2021**
Employment Development and Efficiency Measures	**City of Eugene Planning and Development Department**	**2013-mid 2021**
Land Use Applications	**City of Eugene Planning and Development Department**	**2012-mid 2021**
2021 BLI Monitoring Snapshot	**various sources, see Appendix I**	**January 2021**

Photo by City of Eugene staff.

C. Appendix: General or Overarching Data – Details

General - How is Eugene's population growing?

Average Annual Population Growth Rate

and

Annual Population Estimates and Trend (and forecast)

Overview: Population growth is shown two different ways. The first way is the annual rate of population growth, also referred to as the annual average growth rate (AAGR), for different periods of time. The second way is the annual population estimate for the city limits, compared to the projected population growth of the UGB according to the population forecasts, and as projected out from historical trends.

Data Source: Population data is provided for different time periods but from the same entity, Portland State University (PSU). In addition to providing annual certified estimates, state law requires that PSU provide Oregon counties and cities with population forecasts and that jurisdictions use the population forecast for land use planning purposes (ORS 195.033).

- Historical population data is provided by Portland State University's Population Research Center. PSU provides an annual certified population estimate for cities out to the *city limits*. PSU issues a new population forecast for all cities and counties in Oregon every four years and for cities this includes population forecasts within the city limits and out to the city's *urban growth boundary*.

- The "Adopted UGB Forecast" in these charts is the growth rate from the population forecast that was adopted the last time the UGB was analyzed and adopted, which at this time is the growth rate for the 2012-2032 period.
- The "Current 20-year Forecast" population data in this chart is from the most recent official PSU population forecast, which at this time is the June 30, 2021 forecast. PSU issues an updated official forecast every four years. While historical data is to the city limits and forecast data is to the urban growth boundary, it is generally assumed that the forecast population growth will be accommodated in the city limits which will continue to be extended out to the urban growth boundary over time as land annexes for development (although it is not necessarily likely that the entire UGB will annex by the end of the forecast).
- For the relationship with other planning efforts, such as Urban Reserves, the "Current 21-50 Year Forecast" is also shown from the most recent official PSU population forecast and is provided for reference. Urban Reserves is planning for growth sometime beyond what a 20-year UGB can accommodate (e.g., growth after 2032).

Relationship to UGB land supply and demand model: The population growth rate is **a key direct input** into the land supply and demand model and is an adopted assumption of 0.9%. The number of new people in the "adopted UGB forecast" drives the number of new dwellings Eugene is planning on accommodating over the 20-year planning period.

Takeaway: **During the monitoring period, the AAGR chart shows Eugene has grown faster at an average annual rate of 1.2%, adding 17,291 people from 2012 to 2021, than the Adopted Forecast of 0.9% average annual growth rate for 2012-2032. The latest official PSU forecast (issued June 30, 2021) projects the growth rate will slow down over the 2020-2040 planning period to an overall average of 0.9% which matches the Adopted Forecast.** The population growth rate is projected to decrease further over the long term to about 0.5% average annual growth for 2045-2070 from applying a weighted average growth rate based on historical data (e.g., 1990, 2000, 2010 Census and 2019). However, PSU notes that the farther out the forecast is, the more uncertainties there are.[2] Lane County's growth rate is also projected to decrease from recent years from 0.9% in 2012-2021 to 0.7% through 2040, which is not surprising since Eugene is currently about 51% of Lane County's population, projected to increase to 53% by 2040.

In the *Annual Population Estimates and Trend* chart, the forecast growth rates (both the 2012 adopted rate and the most recent 2021 PSU forecast) are consistently at a lower rate than compared to the actual historical growth rate from 1990 to present, projected out the same length of time (shown in the orange dotted line). This may be because PSU forecasts that there will be less growth from natural increase because deaths will outpace births, resulting in forecasts that show growth slowing compared to historical growth. The area is still projected to grow, just slower than growth during the 1990-2000s.

[2] Email communication with Portland State University staff, June 21, 2021.

PSU's latest population forecast report[3] states that Lane County is projected to continue to grow as follows:

- The University of Oregon's students are a large part of the population. (The total enrollment for the 2021-2022 school year is approximately 21,800.)[4]
- The local economy will continue to grow such as due to the University and projects like the University's new science business incubator development as well as the recent purchase of a large industrial complex that has been vacant in recent years by an industrial business.
- Nearly all cities within 30 minutes of Eugene cite tight housing markets and low vacancy (e.g., Coburg, Lowell, Creswell, and Junction City) based on the general surveys collected by PSU. Some cities have adopted policies that somewhat support housing growth, but some communities do not expect significant growth (e.g., Coburg).
- Total fertility rate has been declining since 2014 but is expected to remain constant over the next 25 years.
- Natural decrease (people born minus people who die) is expected in 2027; while births are expected to increase, deaths are expected to significantly increase and outpace births, possibly due to the increase in the older population (there have also been some temporary increases in deaths in 2020-2021 due to the COVID-19 pandemic).
- Net migration (the number of people moving here minus the number of people leaving) is projected to remain stable and includes a higher in-migration rate for people in their early 20's and a higher out migration for those in their late 20's likely due to the student population.[5]
- The distribution or percentage of the population by age group is expected to remain generally the same as it has since 2010 with 20-24 representing the largest share. Ages 30-40 decreased slightly from 2000 to 2010 whereas the population over 55 increased noticeably. Population shares of the older age groups are projected to continue increasing across the years, the share of the 85+ age group increasing from 2% in 2020 to 5% in 2045.
- In summary, "at the county level, net migration remains positive [meaning in-migration is higher than out-migration], while natural decrease is expected to occur in 2027 and will continue afterwards. This implies that county-wide deaths are expected to outnumber births. However, **since net migration remains positive and the absolute number of in-migration is more than that of natural decrease, the total population is projected to continue to grow**. It is important to note that natural decrease is particularly high in 2021…the potential impacts of

[3] https://www.pdx.edu/population-research/population-research/sites/g/files/znldhr3261/files/2021-08/Final_Report_Lane_Corrected.pdf

[4] Fall term, 2020. While not specifically cited in the PSU report, the University's enrollment is available at https://registrar.uoregon.edu/statistics/facts-at-glance

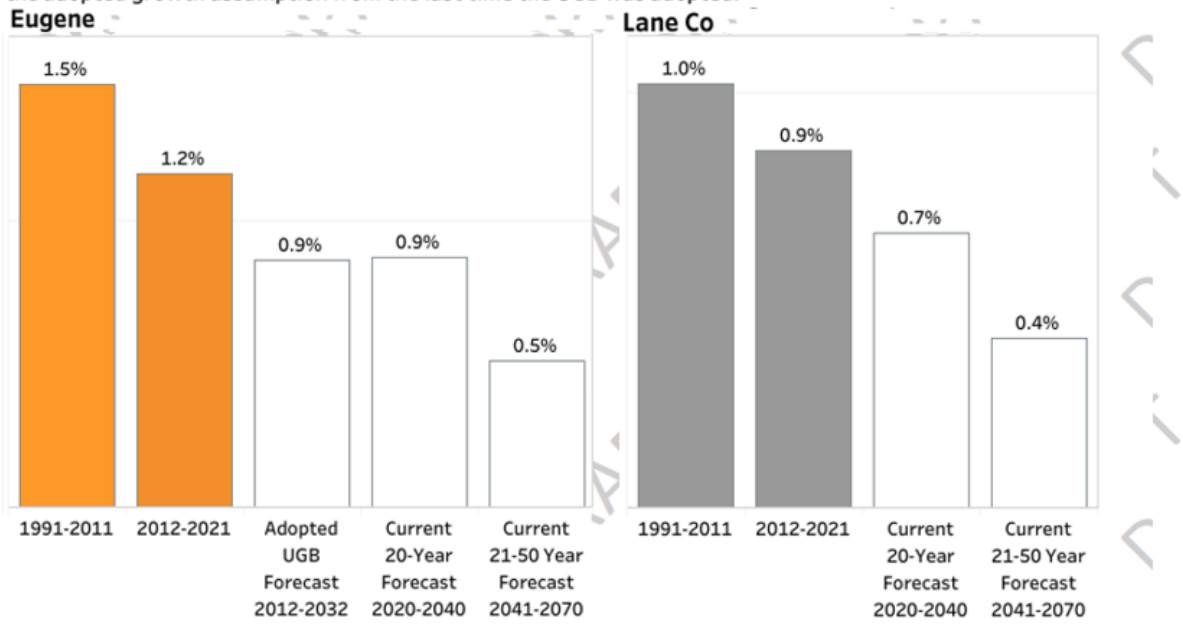
[5] Regarding climate change, PSU states in part that "climate change... risks have not been incorporated into the population projections, except to the extent that they are reflected in population dynamics ... Sequelae of climate change are currently not included in our forecasts due to uncertainty regarding the effect, extent, and timing of such changes here in Oregon." Methods and Data for Developing Coordinated Population Forecasts, June 2021.

the COVID-19 pandemic, in which more deaths and fewer births are expected than usual" (text in brackets added for clarity, bolded text added for emphasis). PSU also states that COVID-19 impacts were not incorporated into this forecast because they are considered short-term temporary impacts.

- Specifically about Eugene:
    - Eugene continues to account for the largest share of the county population at more than half of the county population, totaling 51% in 2020, projected to increase to 53% by 2045 and 55% by 2070.

Average Annual Growth Rate (AAGR)

AAGR is a compounded rate. Current Forecast is the most recent official PSU population forecast. Adopted Forecast is the adopted growth assumption from the last time the UGB was adopted.



Sources:

Historical Data: Portland State University, College of Urban and Public Affairs, Population Research Center for certified city limits estimates

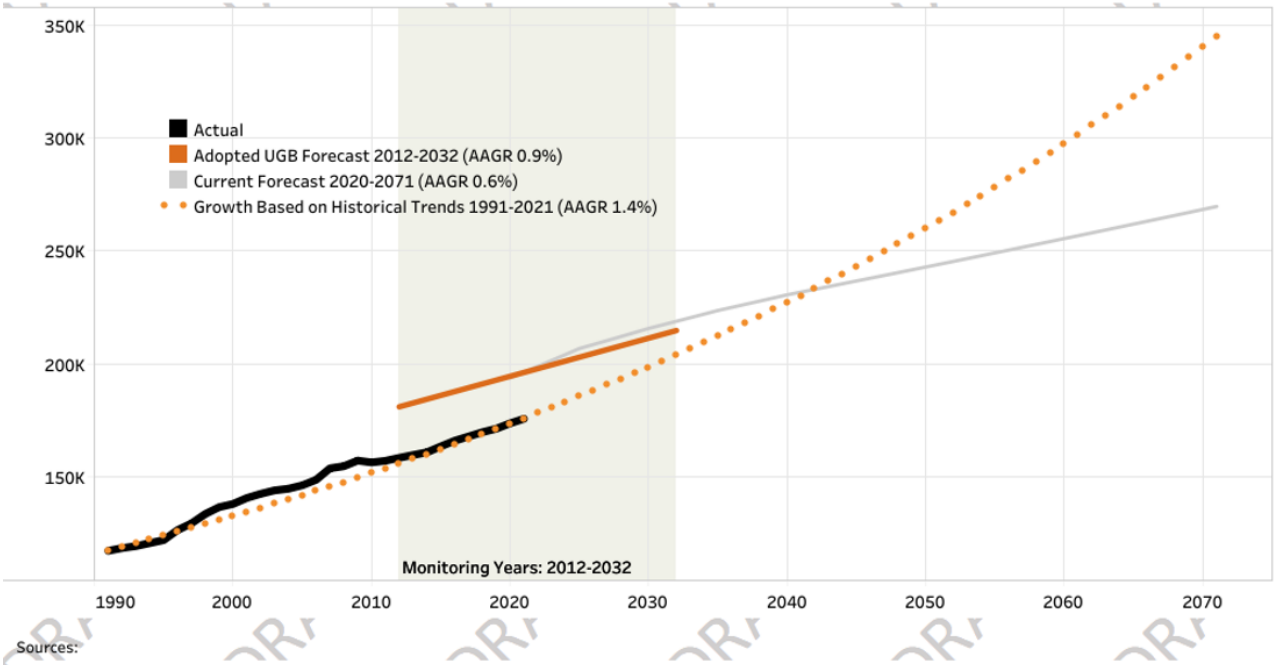
Eugene Forecast Data: City of Eugene Planning and Development Department, Eugene Land Model, from Portland State University for UGB forecast

20-Year Forecast: Portland State University, College of Urban & Public Affairs, Population Research Center

21-50 Year Forecast: Portland State University, College of Urban & Public Affairs, Population Research Center

Annual Population Estimates & Trend - Eugene

Current Forecast is the most recent official PSU population forecast. Adopted Forecast is the adopted growth assumption from the last time the UGB was adopted.



Sources:

Historical Data: Portland State University, College of Urban and Public Affairs, Population Research Center for certified city limits estimates

Eugene Forecast Data: City of Eugene Planning and Development Department, Eugene Land Model, from Portland State University for UGB forecast

20-Year Forecast: Portland State University, College of Urban & Public Affairs, Population Research Center

21-50 Year Forecast: Portland State University, College of Urban & Public Affairs, Population Research Center

Population by Age Group

Overview: The age distribution of the population by general categories.

Data Source: Historical data is provided from the Decennial Census. Forecast data is provided by Portland State University and is only provided at the county level (not the city level) because PSU indicates that while the city-level age data is incorporated into their forecast, the city level data is not precise enough to compare year to year like the county level data is.

Relationship to UGB land supply and demand model: The age distribution of the population is *not* a direct input into the land supply and demand model.

It does provide community context about Eugene's household composition and changes in demographics, and indirect information into planning for the types of housing needed.

Takeaway: **The distribution or percentage of the population by age group is expected to remain generally the same as it has since 2010, with ages 20-24 continuing to represent the largest share**. Ages 30-40 decreased slightly from 2000 to 2010 whereas the population over 55 increased noticeably.

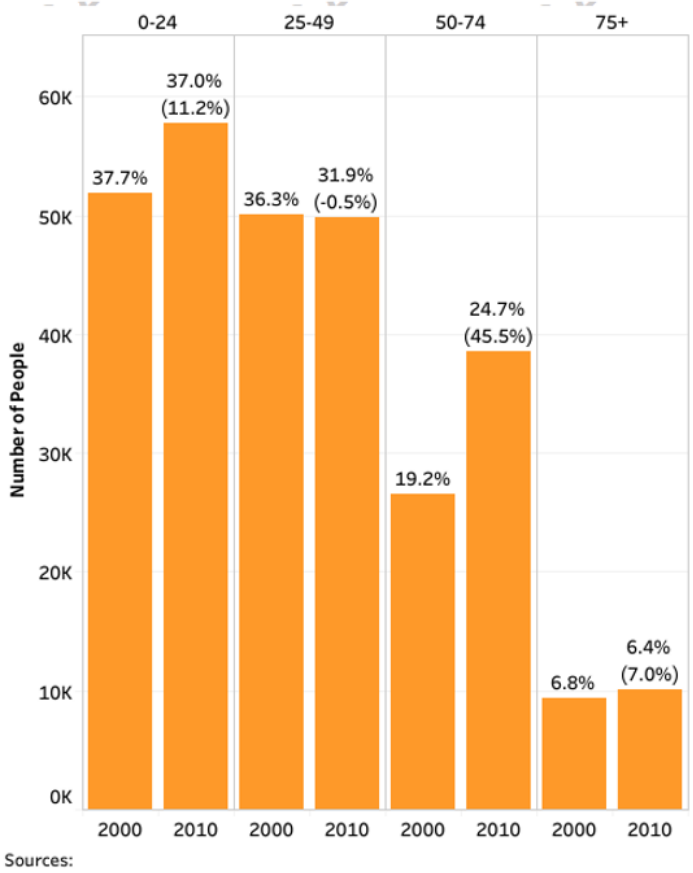
Similarly, going forward population shares of the older age groups are projected to continue increasing across the years, including the share of the 85+ age group increasing from 2% in 2020 to 5% in 2045.

Eugene historical age distribution shows the biggest change in number of people in the 50-74 age category which increased about 45% between 2000 and 2010. Lane County had a similar increase in the same age category (41%) over the same period.

PSU's latest population **forecast for Lane County shows that over the 2020 to 2045 period, ages 25-49 will add the biggest *number* of people (about 29,000 people), whereas ages 75+ will have the biggest *percent* increase growing by 67% (almost 21,500 people)**. Looking at a finer grain of age groups, ages 20-24 will grow and continue to have the largest share of the population maintaining at 8% from 2020 through 2045. This coincides with the University of Oregon's projection for moderate growth. Ages 80-84 and 85+ are projected to increase their share of the population from 2% each to 4% each by 2045.

Census age distribution chart for Eugene and PSU's age distribution for Lane County, historical 2000 compared to 2010, including the percent change in the number of people between years.

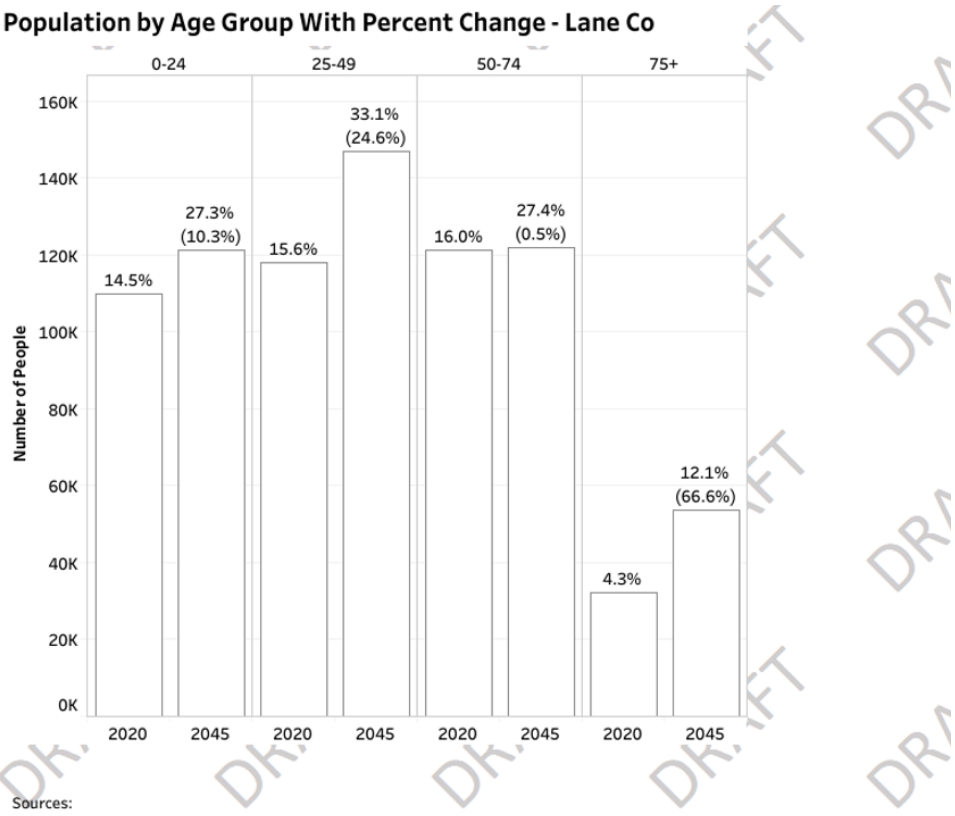
Population by Age Group With Percent Change - Eugene



Sources:

2000, 2010: U.S. Census SF1 Table P012

PSU's age distribution chart for Lane County, 2020 compared to 2045 forecast:



Population of Near-by Cities

Overview: The population and average annual growth rate of near-by Lane County cities.

Data Source: See *Annual Population Estimate* and *Annual Population Growth Rate*.

Relationship to UGB land supply and demand model: Not applicable.

It does provide regional context about how other nearby cities are projected to grow compared to Eugene.

Takeaway: According to the latest PSU forecast (June 2021), **over the next 20 years (2020-2040)** Eugene is expected to add 36,744 people at a growth rate of 0.9%. Over the same period, **the two largest nearby communities, Springfield and Cottage Grove, are projected to grow slower than Eugene (5,705 people at 0.4% and 714 people at 0.3%, respectively) within their UGBs**. In comparison, the rest of the near-by cities listed in the table below are projected to grow at the same or faster rate (ranging from 0.9-1.75%) than Eugene but are adding a significantly smaller number of people than Eugene (between 572 to 2,127 people each).

Compared to the growth in recent years (2010-2021), over the next 20 years Eugene and **near-by cities are projected to grow about the same or slower than they have been**, with the exception of Creswell and Oakridge.

Annual Growth Rate Detail

AAGR is a compounded rate. Current Forecast is the most recent official PSU population forecast. Adopted Forecast is the adopted growth assumption from the last time the UGB was adopted.

	1991-2011			2012-2021			Adopted UGB Forecast 2012-2032			Current 20-Year Forecast 2020-2040			Current 21-50 Year Forecast 2041-2070		
	Beginning Population	Ending Population	Compound Growth Rate %/Year	Beginning Population	Ending Population	Compound Growth Rate %/Year	Beginning Population	Ending Population	Compound Growth Rate %/Year	Beginning Population	Ending Population	Compound Growth Rate %/Year	Beginning Population	Ending Population	Compound Growth Rate %/Year
Coburg	745	1,045	1.71	1,045	1,322	2.65				1,375	1,947	1.75			
Cottage Grove	7,475	9,745	1.33	9,770	10,792	1.11				10,660	11,374	0.32			
Creswell	2,385	5,015	3.79	4,990	5,684	1.46				5,913	8,040	1.55			
Eugene	117,155	157,010	1.47	158,335	175,626	1.16	180,915	214,693	0.86	193,768	230,512	0.87	231,726	268,322	0.51
Junction City	3,685	5,445	1.97	5,445	7,032	2.88				6,954	8,726	1.14			
Oakridge	3,100	3,205	0.17	3,210	3,238	0.10				3,458	4,200	0.98			
Springfield	45,380	59,695	1.38	59,840	62,352	0.46				70,337	76,042	0.39			
Veneta	2,535	4,610	3.04	4,610	5,271	1.50				4,845	6,180	1.22			
Lane Co	288,350	353,155	1.02	354,200	382,647	0.86				381,365	434,846	0.66	436,612	490,958	0.41
Oregon	2,927,800	3,857,625	1.39	3,883,735	4,266,560	1.05				4,266,184	5,100,899	0.90			

Sources:

Historical Data: Portland State University, College of Urban and Public Affairs, Population Research Center for certified city limits estimates

20-Year Forecast: Portland State University, College of Urban & Public Affairs, Population Research Center

21-50 Year Forecast: Portland State University, College of Urban & Public Affairs, Population Research Center

PSU projects that **some smaller UGBs will increase their shares of the county population in the future, but Eugene is projected to continue to account for the majority of the County's population, increasing from 51.3% in 2020 to 53% by 2040 to 54.7% by 2070. Other Lane County cities (excluding Springfield) account for 31% of the population in 2020, declining slightly to 29% by 2040.**

Migration Data

Why people are moving or leaving the Eugene area is *not* a specific input into the land supply and demand model and was not collected during the 2012-2032 UGB analysis but does provide context for growth trends and long-term planning. Specific sources that collect data about the "why" of people moving to or away from the Eugene area were not readily available but there is some information available about migration trends in addition to those discussed above:

Oregon:

- In terms of domestic migration, roughly 3-4% of Oregon's population moved here in the past year, while 2-3% have moved away in the past year. On net, domestic migration has contributed 0.5-1 percentage points of population growth per year over the past decade. Oregon ranks 7th fastest in population growth from domestic migration among all states. [6]
- Oregon's population grows faster than most states. Most people who move to Oregon are in their 20s and 30s. As such, migration provides an ample supply of mostly younger, mostly skilled labor that allows local businesses to higher and expand at faster rates. [7]
- Between 2014-2018, there was migration flow between Oregon and every other state in the nation. California was by far the greatest source of net in-migration to Oregon of roughly 21,800 people each year, and Washington State was the largest recipient of net out-migration from Oregon of about 5,900 people each year. [8]

Lane County: [9]

Based on Internal Revenue Service data, between 2000 and 2019 Lane County has consistently experienced about 60% of in-migration from out-of-state residents (dominated by in-migration from California), and since at least 2011 the out-of-state residents migrating to Lane County have had notably higher incomes on average than those migrating from in-state:

- During the monitoring period from 2011-2019, 2016-2017[10] had the largest positive net migration into Lane County of 4,107 people, followed by 2015-2016 (3,479 people) and then 2017-2018 (1,696 people).[11]
- **From 2011-2019, about 63% of the people migrating to Lane County were from out-of-state and about 37% were migrating from within Oregon**. On average, Lane County sees 8,779 residents coming from out-of-state compared to 5,237 new residents a year from in-state. Comparatively, the total adjusted gross income (AGI) for incoming residents to Lane County from out-of-state was approximately 93% higher than the AGI of residents coming into to Lane County from in-state.

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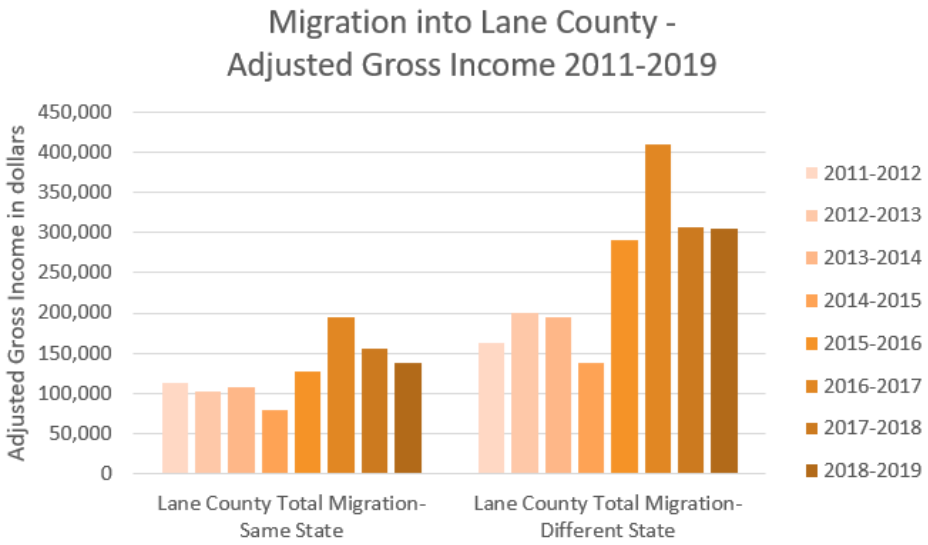
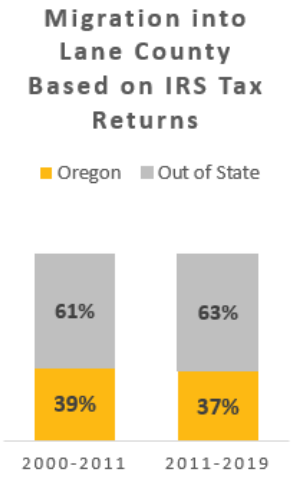
[6] https://oregoneconomicanalysis.com/2021/02/04/decomposing-oregons-population-growth/, February 4, 2021
[7] https://oregoneconomicanalysis.com/2021/02/04/decomposing-oregons-population-growth/, February 4, 2021
[8] https://www.qualityinfo.org/-/migration-patterns-in-the-past-five-years , August 18, 2020
[9] https://www.irs.gov/statistics/soi-tax-stats-migration-data , August 27, 2021. The data comes from personal exemptions claimed on tax returns. Number of returns filed is approximate to the number of households that migrated, and the number of personal exemptions claimed approximates to the number of individuals that migrated.
[10] Migration data shows movement from year to year, the files are expressed in 2-year increments, such as the 2016-2017 migration data. Thus, the file would show actual changes in residence from Calendar Year 2016 to Calendar Year 2017. It is important to note that the income information reported on the migration files is for the tax year corresponding to the earlier of the 2 years.
[11] Net migration was (2016-2017) 4,107 people from 2,086 tax returns, (2015-2016) 3,479 people from 1,785 tax returns and (2017-2018) 1,696 people from 991 tax returns.

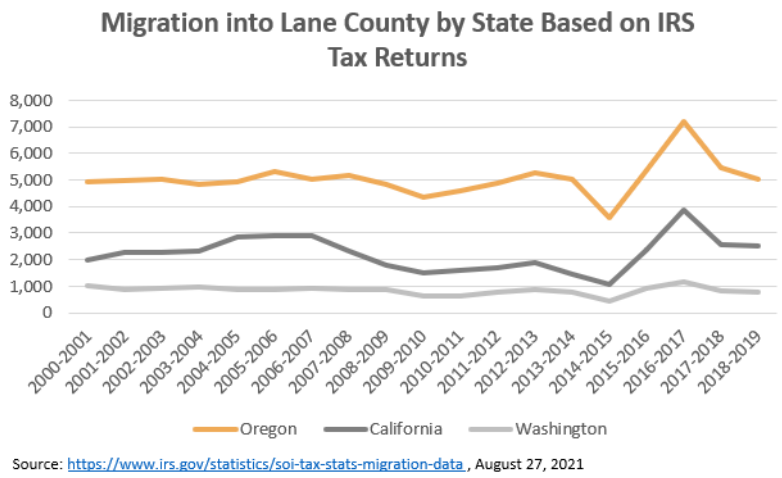
- Before the monitoring period, from 2000-2011, the migration trends were similar with about 60% of the people migrating to Lane County coming from out-of-state and about 39% migrating from within Oregon. During that timeframe, Lane County had approximately 8,412 residents coming from out-of-state compared to 5,461 new residents a year from in-state.
- **From 2011-2019, Lane County experienced the highest inflow of new residents from out-of-state from California (16%) and then from Washington (6%).**[12] Trends were similar from 2000-2011, the highest inflow of residents from out-of-state came from California (18%) followed by Washington (7%).
- From 2011-2019, similar to inflow, there was more migration out of Lane County to out-of-state (54%) than there was to elsewhere within Oregon (46%). The highest outflow of residents from Lane County to another county was to Multnomah County followed by Linn and Washington County.
- For the last 20 years, from 2000-2019, Lane County saw the highest inflow of new residents from in-state from Linn, Multnomah, and Douglas Counties (varying in order from year to year).



Source: https://www.irs.gov/statistics/soi-tax-stats-migration-data , August 27, 2021

[12] Estimate based on new residents from out-of-state that were assigned a state they were migrating from. Some residents were not assigned a state but they were still included in the total number migrating from out-of-state.





Source: https://www.irs.gov/statistics/soi-tax-stats-migration-data , August 27, 2021

Household Assumptions - Who lives in the community?

Household Size

Overview: Referred to in the U.S. Census as persons per household, household size is the number of people living in each household on average. The American Community Survey (ACS) data may appear to suggest that the household size is changing from year to year, but it does not change a lot over time.

Data Source: The ACS provides the most recent data based on a sample of Eugene households. The Decennial Census data is older but is from a survey of all households in Eugene and so it is a stronger source of this data.

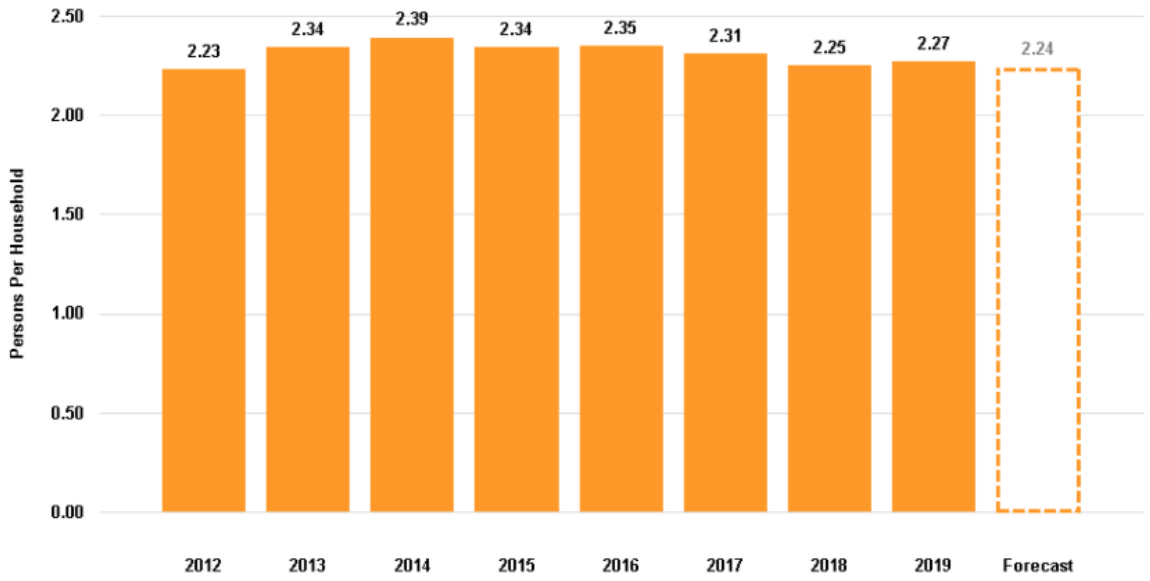
Relationship to UGB land supply and demand model: This is a **direct input** into a land supply and demand model and is an adopted assumption of 2.24. The projected population growth divided by the average household size results in the number of new dwellings a city plans for to accommodate population growth. The Adopted Forecast is for an average of 2.24 people per household.

It also provides community context about Eugene's household composition and changes in demographics. Household size provides indirect information into planning for the types of housing needed. However, there's no reasonable housing policy change that the City can make that directly affects household size.

Takeaway: Average household size varies slightly from year to year in the ACS data as shown in the chart below. There were no significant shifts in the average size of Eugene households throughout the monitoring period. The 2032 Adopted Forecast for average household size is 2.24 persons per household and in 2019 the average was 2.27. The highest average during the monitoring period was in 2014 at 2.39. However, the best way to evaluate how average household size is changing is looking at it over a longer term, such as a 10-year period, rather than year to year. The best source of information for average household size is the Decennial Census as it includes average household size for (generally)

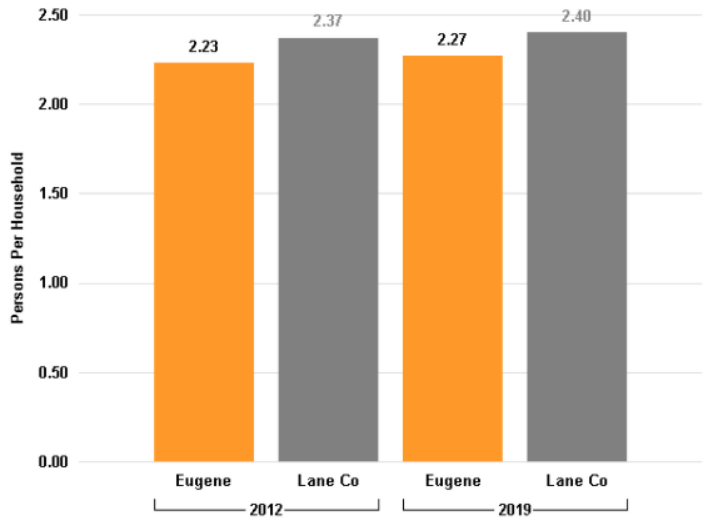
all of Eugene's households. Comparing the changes between the 2000, 2010, and 2020 Census will provide more definitive information about any long-term change in average household size.

Average Household Size - Eugene



Source: U.S. Census American Community Survey 1 Year Estimates, Table B25010; City of Eugene Planning and Development Department, Land Sufficiency Model January 2017

Average Household Size



Source: U.S. Census American Community Survey 1 Year Estimates, Table B25010

Household Composition

Overview: The composition of households refers to the proportion of households that are comprised of non-families, families without children, or families with children. The Census defines a "family" household as a household maintained by a householder who is in a family (group of two people or more, one of whom is the householder, related by birth, marriage, or adoption and residing together), and includes any unrelated people (unrelated subfamily members and/or secondary individuals) who may be residing there. The Census defines a "non-family" household as a householder living alone (a one-person household) or where the householder shares the home exclusively with people to whom they are not related. The Census breaks down household composition further into whether the head of the household is female or male, but that level of detail is not necessary for Eugene's UGB analysis.

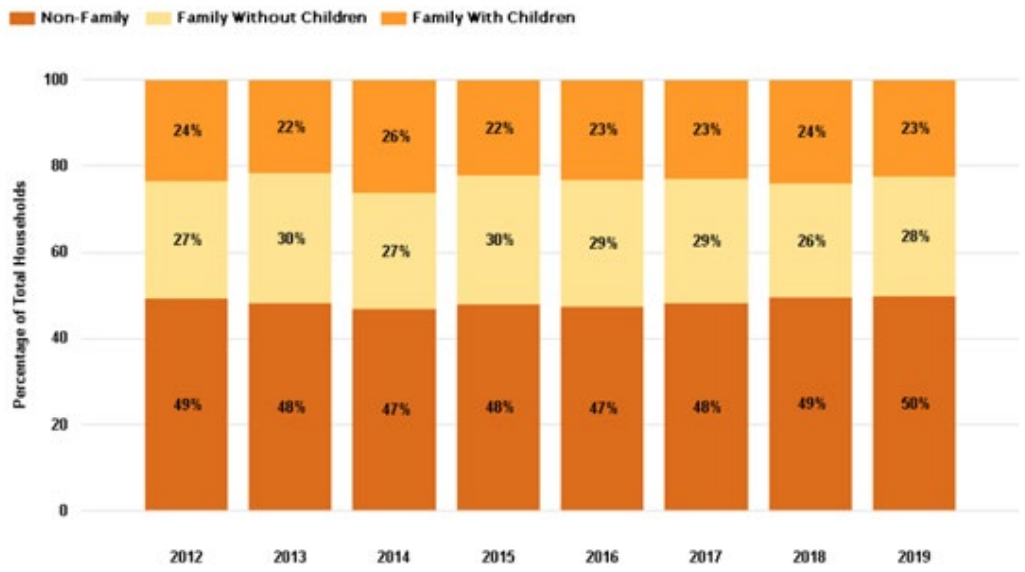
Data Source: The ACS provides the most recent data based on a sample of Eugene households. The Decennial Census data is older but is from a survey of all households in Eugene.

Relationship to UGB land supply and demand model: Household composition is *not* a direct input into a land supply and demand model but relates to what mix of housing types to plan for Eugene's new housing.

It is also provides community context about Eugene's household composition and changes in demographics. Household composition provides indirect information into planning for the types of housing needed. However, there's no reasonable housing policy change that the City can make that directly affects household composition.

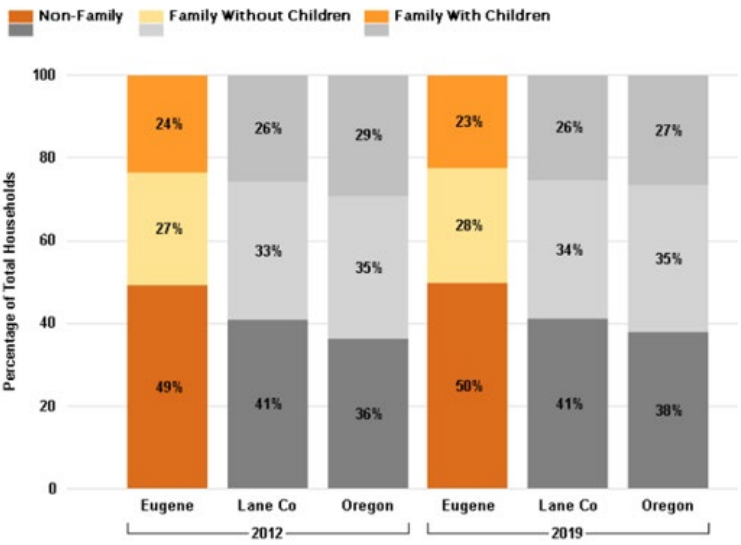
Takeaway: Eugene continues to have about the same amount of non-family households throughout the 2012-2019 monitoring period. **The 2019 household composition is approximately the same proportions for each category as it was during the 2010 Decennial Census** (which was 49% non-family, 27% families without children and 24% families with children). The differences in household composition between Eugene and Lane County and Oregon are likely the result of the large college student population in Eugene, which typically results in more non-family households than the rest of the county and state.

Household Composition - Eugene



Source: U.S. Census American Community Survey 1 Year Estimates, Table B11005

Household Composition



Source: U.S. Census American Community Survey 1 Year Estimates, Table B11005

People Living in Group Quarters

Overview: People living in group quarters refers to the proportion of the population that are living in housing that does not consume standard dwellings, including jails, dormitories, and nursing homes or assisted care facilities that are not apartments. Generally, needs for these housing types are typically

institutions (colleges, government agencies, health-care corporations) operating outside of the standard housing market.[13]

Data Source: The ACS provides the most recent data based on a sample of Eugene households. The Decennial Census data is older but is from a survey of all households in Eugene.

Relationship to UGB land supply and demand model: This is a **direct input** into a land supply and demand model and is an adopted assumption. The projected percentage of the population that will need group quarters housing is subtracted from the total population projection and the group quarters land need is calculated separately. Group quarters are typically at densities comparable to multi-family. The Adopted Forecast is that 5% of the population will be living in group quarters housing.

The percentage of persons in group quarters provides information towards planning for the types of housing needed for population growth because typically group quarters housing develops at a higher density than non-group quarters housing.

Takeaway: According to ACS data, the percentage of the population living in group quarters varies slightly from year to year. **In 2019, the percentage is lower at 3.8% than at the beginning of the 2012-2019 monitoring period (4.6%)[14] and lower than the Adopted Forecast (5%)**. It is also lower than it was during the 2000 Decennial Census of 4.4% and 2010 Decennial Census of 4.6%, whereas the Adopted Forecast predicted a slight trend upward. More students and/or seniors may be choosing to live in standard housing rather than group housing types, as may be reflected in the multi-family production over the monitoring period. However, this slight trend downward during the monitoring period is not necessarily a trend that may continue. For example, the most recent population forecast (2021) anticipates the 80+ age population doubling in Lane County by 2045; as the population ages, the percentage of people in nursing homes/assisted care facilities may go up and there may be a need to plan for more group quarters than in the past.

Over the monitoring period between 2012-2019, permits for 250 new group quarter dwellings[15] for congregate assisted care facilities were issued as well as a couple of permits for large group quarter dormitory units in 2017 and 2019 on the University of Oregon campus. As of November 2020,[16] the University of Oregon anticipated moderate growth (2.0% to 2.5% per year) in undergraduate student enrollment until 2026, and stabilized enrollment levels after that, with graduate student enrollment

[13] The U.S. Census Bureau defines group quarters as: "A group quarters is a place where people live or stay other than the usual house, apartment, or mobile home. Two general types of group quarters are recognized: institutional (for example, nursing homes, mental hospitals or wards, hospitals or wards for chronically ill patients, hospices, and prison wards) and noninstitutional (for example, college or university dormitories, military barracks, group homes, shelters, missions, and flophouses). Group quarters may have housing units on the premises for staff or guests." https://www.census.gov/programs-surveys/popest/about/glossary/housing.html

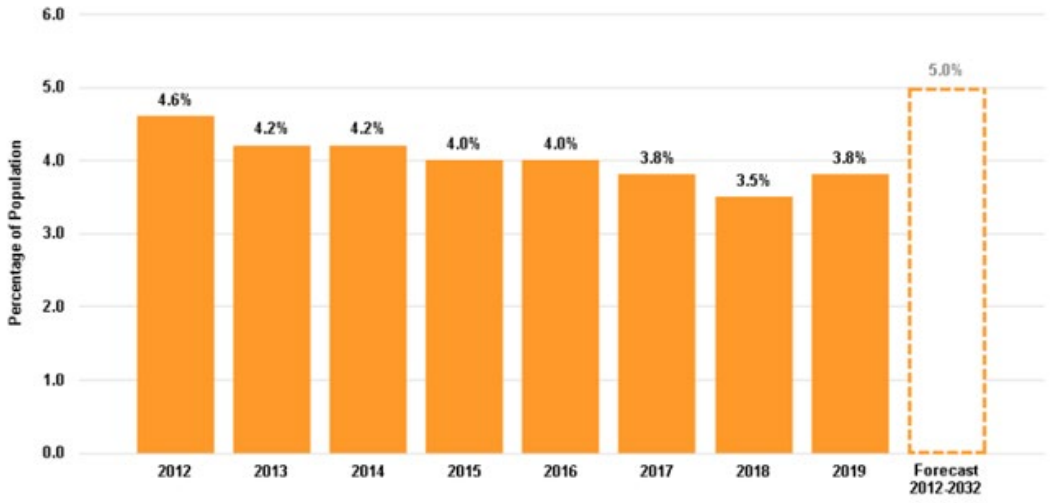
[14] The margin of error for this data was relatively high, averaging +/- 26% during the monitoring period, ranging from between +/- 23-33% between 2012-2019.

[15] An equivalent number of dwellings for group quarters is used here as derived from the land use code for the purposes of calculating density. One dwelling equals 1.5 beds for assisted care facilities, nursing homes, or residential treatment centers. However, dormitories and jails do not have an equivalent dwelling calculation in the land use code.

[16] E-mail correspondence with JP Monroe, University of Oregon Office of Institutional Research, November 2020.

growth expected to increase very slowly. **The University continues to have a goal of providing on-campus housing for at least 25% of undergraduate students**, which is reflected in the recent dorm permits. For more discussion related to new group quarters development, see Appendix D: Housing Development Data.

Population Living in Group Quarters - Eugene



Source: U.S. Census American Community Survey 1 Year Estimates, Table B26001; City of Eugene Planning and Development Department, Land Sufficiency Model January 2017

Population of Latino/a/x Origin

Overview: The population of Latino/a/x origin is the proportion of the population that is of Latino/a/x origin.

Data Source: The ACS provides the most recent data based on a sample of Eugene households. The 2000 and 2010 Decennial Census data is older but is from a survey of all households in Eugene.

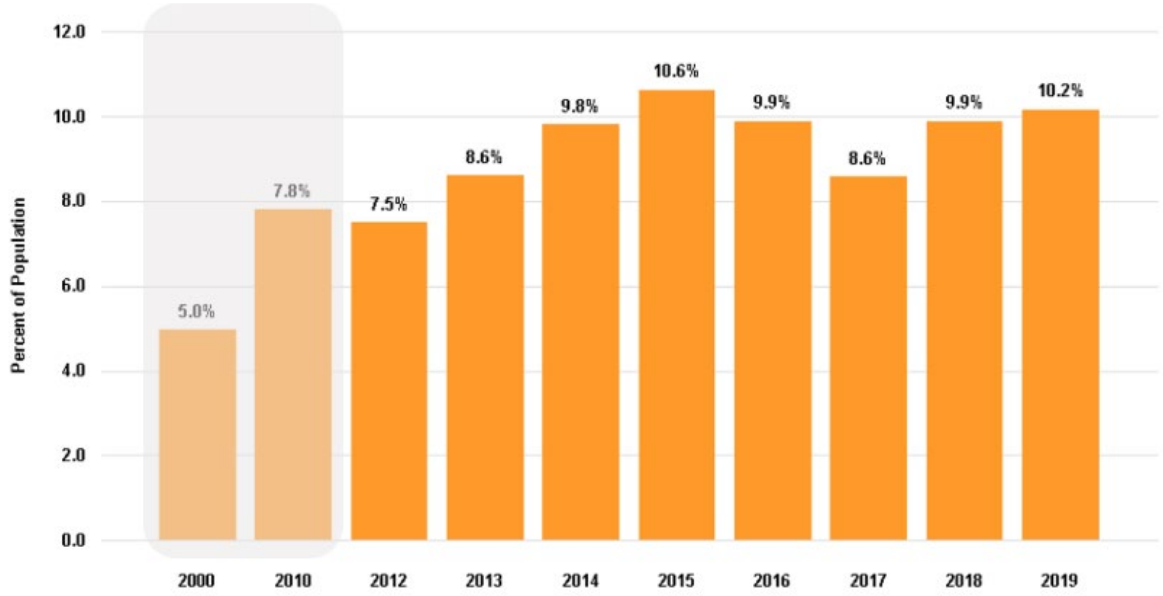
Relationship to UGB land supply and demand model: This is *not* a direct input into a land supply and demand model.

It does provide indirect information into the types of housing and densities Eugene can plan for as the population becomes more ethnically diverse. For instance, in Eugene 2010 the mean age for Latino/a/x communities was younger than that of Eugene's total population, Latino/a/x 25 to 44 years had a higher homeownership rate than non-Latino/a/x households in this age range, but lived in single-family housing at the same rate as non-Latino/a/x households, and Latino/a/x households had a lower-than-average income for Eugene.[17]

[17] Eugene Residential Land Supply Study 2012-2032 https://www.eugene-or.gov/DocumentCenter/View/35479/3_Ordinance-Ex-A-2-Residential-Land-Supply-Study---Env-Eug-Residential#page=180

Takeaway: The ACS indicates that **Eugene's Latino/a/x population has increased over the 2012-2019 monitoring period**, though it has fluctuated a bit over the last few years. The ACS margin of error for the percentage of the population that is Latino/a/x in 2019 is high at +/-19%, and ranges between +/-12 to 22% during the monitoring period. Considering the 2019 margin of error, Eugene's Latino/a/x population in 2019 was between 8.3 and 12.1%. The percentage of Latino/a/x population continues to increase. In 2019 it was 10.2%, more than double the percentage since the 2000 Decennial Census (5%) and higher than the 2010 Decennial Census (7.8%), (though due to the margin of error the range is between 8.3 to 12.1%). While Eugene appears to continue to see a rise in population of Latino/a/x individuals, a better source for ethnicity data is the Decennial Census, which uses a much larger sample of Eugene's households. Comparing the change between the 2010 and 2020 Census will provide more definitive information about long-term change in the proportion of the population that is of Latino/a/x origin.

Population of Latino/a/x Origin



Source: U.S. Census American Community Survey 1 Year Estimates, Table B03002; U.S. Census 2000, SF1 Table P4; U.S. Census 2010, SF1 Table P5

Population by Race and Latino/a/x Origin

Overview: Population by race and Latino/a/x origin is the proportion of the population that is Hispanic/Latino/a/x (of any race), white, Black or African American, American Indian or Alaska Native, Asian, Native Hawaiian or Other Pacific Islander, all other races, or two or more races.

Data Source: The ACS provides the most recent data based on a sample of Eugene households. The 2000 and 2010 Decennial Census data is older but is from a survey of all households in Eugene and so is more complete data than the ACS.

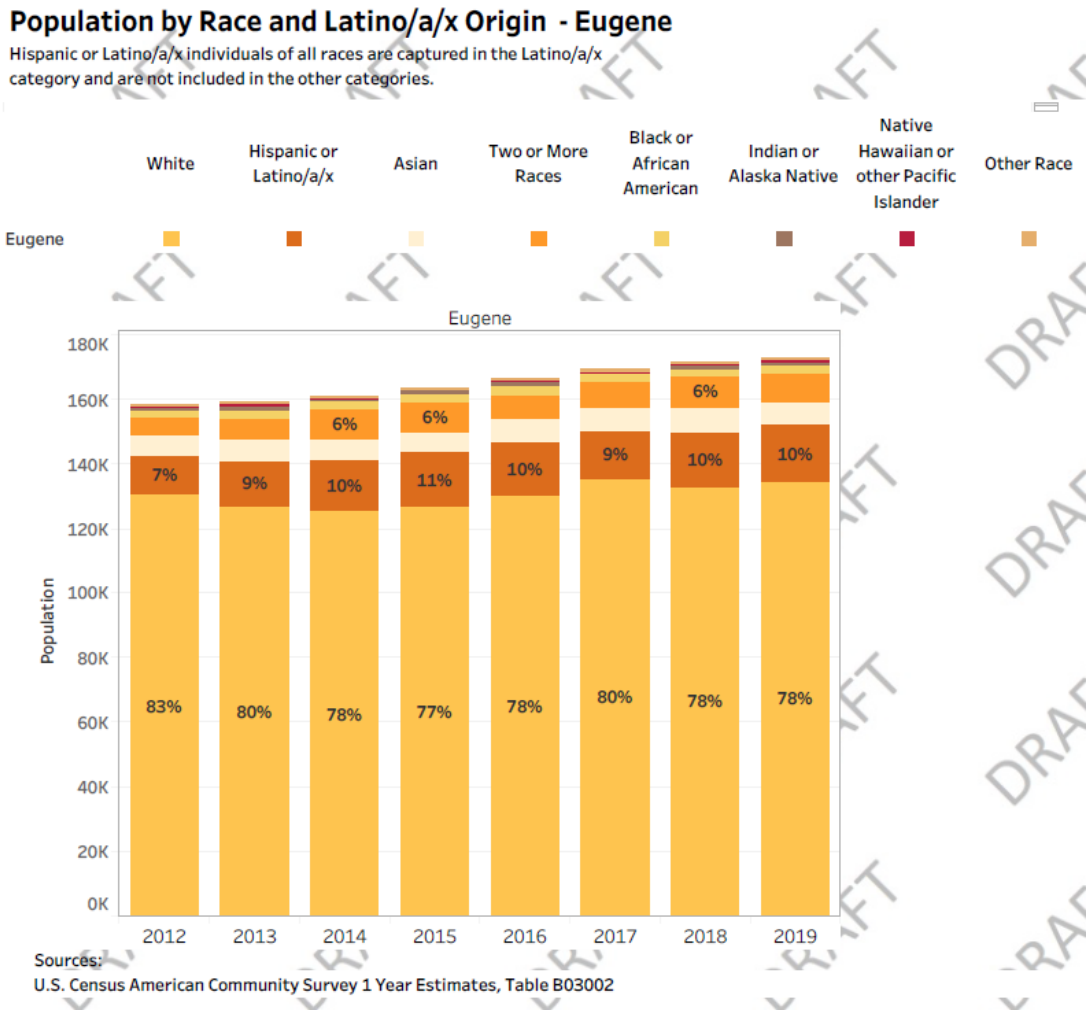
Relationship to UGB land supply and demand model: Same as *Population of Latino/a/x Origin*.

Takeaway: This ACS data has some of the same large margin of error issues as the Population by Latino/a/x Origin for races other than white alone. That said, the data shows that based on a sample of households **the Hispanic or Latino/a/x population in Eugene increased 48% during the monitoring period** between 2012 when there were 11,834 Hispanic or Latino/a/x individuals in Eugene to 17,534 in 2019. **There were minimal increases in all "Not white or Hispanic or Latino/a/x" race categories, though the numbers fluctuated over the monitoring years, so it was not a steady increase.**

In the chart below, the bars for the Indian or Alaska Native, Native Hawaiian or Other Pacific Islander, and Other Race categories are barely visible because each of these categories has less than 1,000 people.

A better source for race data is the Decennial Census, which uses a much larger sample of Eugene's households. In 2000, Eugene's composition was 86% white non-Hispanic, 9% all other races, and 5% Hispanic or Latino/a/x. In 2010 there was a small decrease in the percentage of non-white population, and Eugene's composition was 82% white non-Hispanic, 10% all other races, and 8% Hispanic or Latino/a/x, but not much had changed in those ten years. In 2019, the ACS data shows that white non-Hispanic people made up 78% of the population, all other races made up 12% and Hispanic or Latino/a/x made up 10%. Comparing the change between the 2010 and 2020 Census will provide more definitive information about long-term change in race.

But the ACS data is the most recent data and it shows that based on a sample of households Eugene has become more diverse over the monitoring period, albeit slowly.



*Note: This chart has more categories than most charts in this report and the smaller categories can be difficult to distinguish. As a reminder, the bar chart legend reads from left to right and matches the order of the bar categories from bottom to top.

Households by Tenure

Overview: Households by tenure is the proportion of dwellings that are owner occupied compared to renter occupied. Structure type can impact whether a dwelling is renter or owner occupied.

Data Source: The ACS provides the most recent data based on a sample of Eugene households. This data is not available from the Decennial Census.

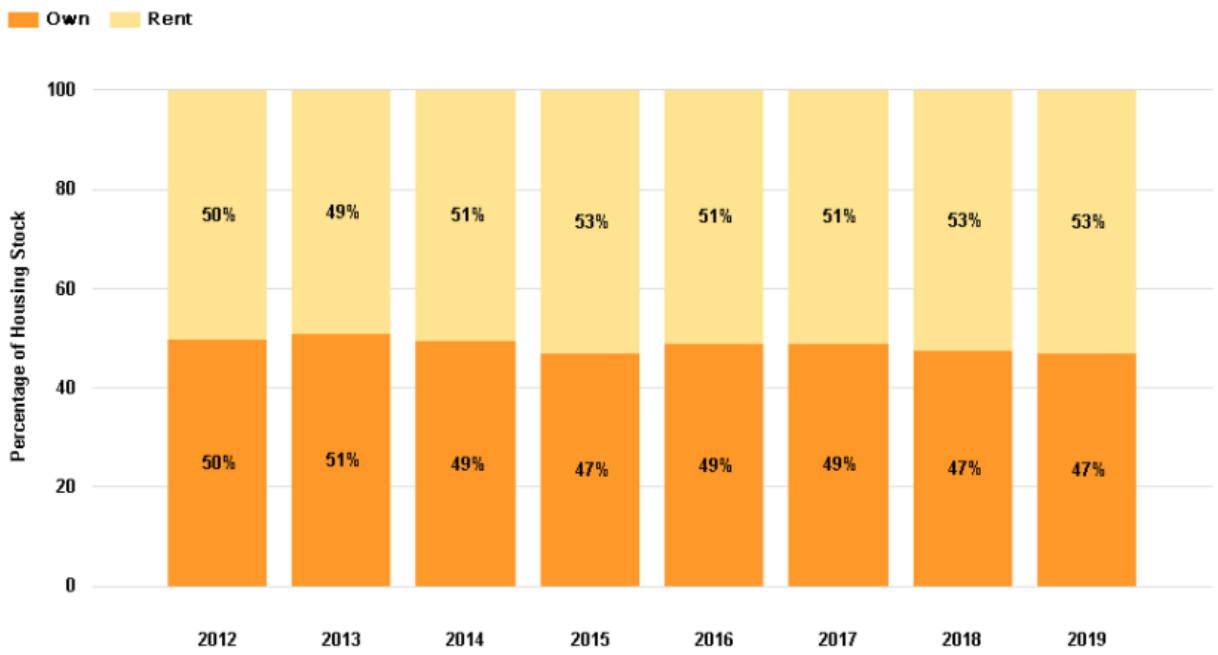
Relationship to UGB land supply and demand model: This is *not* a direct input into a land supply and demand model.

It does provide indirect information into what mix of housing types and densities to plan for because historically the majority of single-family housing types are owned and the majority of multi-family

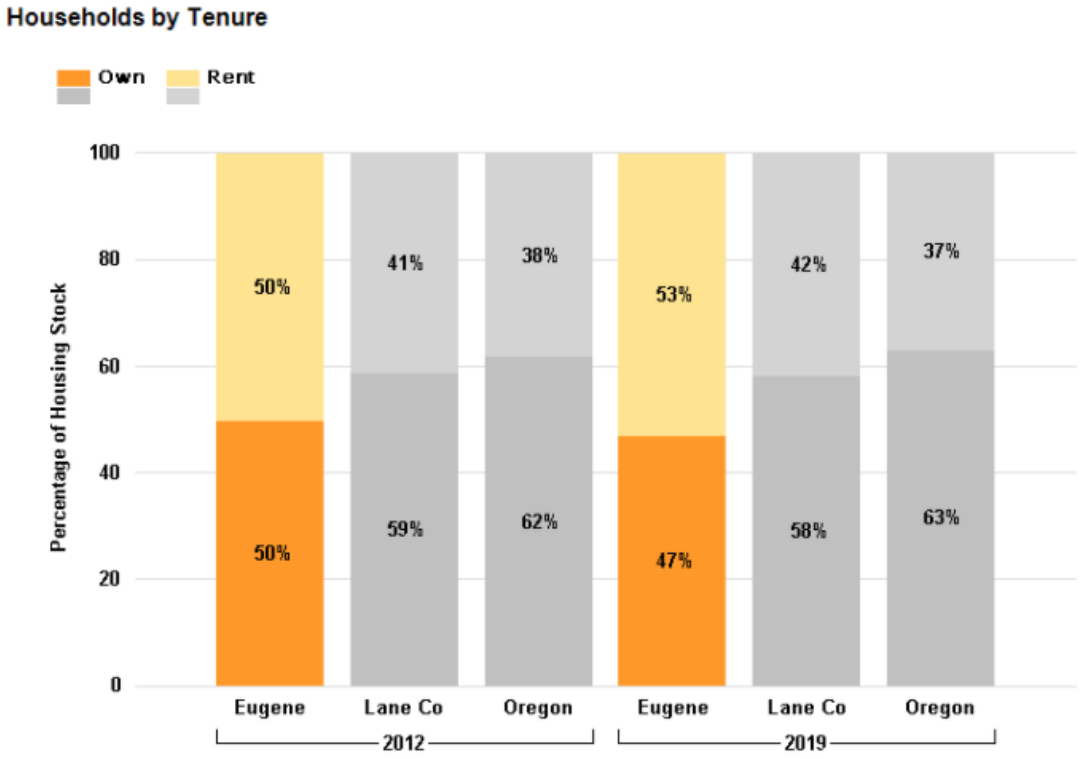
housing types are rented. There's no reasonable housing policy change that the City can make that directly affects tenure, however changes to Eugene's land use code to make it easier to build more diverse, single-family attached or smaller housing types may increase opportunities for home ownership, thereby increasing the overall percentage of ownership incrementally over time.

Takeaway: **The proportion of owner and renter households has stayed about the same over the 2012-2019 monitoring period at about a half and half split, with the number of ownership households slightly decreasing over the last few years**. As seen with the comparison to Lane County and Oregon, Eugene typically has a larger share of renter households, being home to not only the University of Oregon, but also Bushnell University, New Hope Christian College and Lane Community College's downtown campus.

Households by Tenure - Eugene



Source: U.S. Census American Community Survey 1 Year Estimates, Table B25032



Source: U.S. Census American Community Survey 1 Year Estimates, Table B25032

Owner and Renter Households by Tenure and Housing Type

Overview: Owner and renter households by tenure and housing type is the proportion of each housing type (e.g., single-family detached, single-family attached and multi-family dwellings) that is owner occupied compared to renter occupied.

Data Source: The ACS provides the most recent data based on a sample of Eugene households. This is not available from the future Decennial Census.

Relationship to UGB land supply and demand model: This is *not* a direct input into a land supply and demand model.

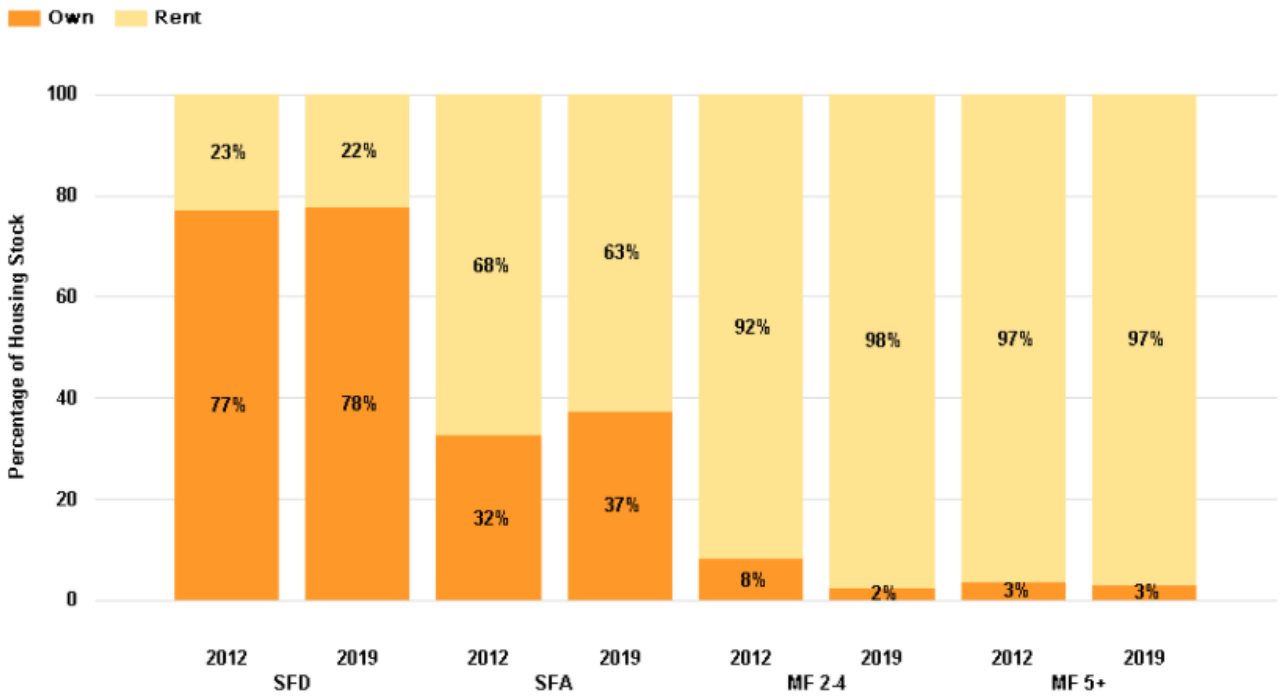
It does provide indirect information into what mix of housing types and densities to plan for because historically the majority of single-family housing types are owned, and the majority of multi-family housing types are rented. There's no reasonable housing policy change that the City can make that directly affects tenure, however changes to the land use code to allow more diverse or smaller housing types would open up some ability for lower income households to buy a home.

Takeaway: The proportion of households that rent compared to own by housing type has stayed about the same over the 2012-2019 monitoring period.

When looking at annual basis (not shown), there appears to be a shift towards more owner occupied single-family attached dwellings between 2016-2017 and 2018-2019, however the sample size is very small for this type of dwelling compared to single-family detached and multi-family, so the margin of error is high. Eugene building permit data shows that 10 single family attached dwellings were built in 2016 and 14 dwellings built in 2018. Because of the small data set, this may have a larger impact in the increase in the percentage of homeownership for single-family attached housing types in the following years.

The overall takeaway is that **single-family detached housing continues to have a higher rate of ownership, while single-family attached, multi-family with 2-4 dwellings and multi-family with 5 or more dwellings have high renter households, and those patterns have not changed**.

Owner and Renter Households by Housing Type - Eugene



Source: U.S. Census American Community Survey 1 Year Estimates, Table B25032

Vacancy Rate

Overview: Vacancy rate is the proportion of existing dwellings, both single-family and multi-family, that are vacant at the time of a survey. A dwelling can be vacant for several reasons such as it is part of a recent sale and the owner has not moved in yet, a renter is moving between units, a unit has not been rented yet, or vacant recreational or seasonal rentals. Vacancy rates are typically higher for multi-

family dwellings than owner occupied single-family dwellings. Vacancy rates vary throughout the year (for instance they are lower in September when school is in session). Starting in 2015, the ACS Current Population Survey/Housing Vacancy Survey began using new Metropolitan Statistical Area (MSA) definitions. Changes in the delineations of these statistical areas generally consist of the recognition of new areas as they reached the minimum required urban area or city population, and the addition of counties to existing areas as new commuting and urban area data showed them to qualify. Caution should be used when comparing MSA data (which impacts vacancy rate) starting in 2015 to earlier data, however the new method was intended to improve the quality of the data.[18]

Vacancy rates are cyclical and represent the lag between the housing demand and the market's response to that demand by producing additional dwellings. It is important that any long-term land supply account for and provide a certain amount of the future supply to be vacant to allow for that movement between dwellings. A housing supply that does not have enough vacant dwellings can have higher housing costs (it does not mean that vacant dwellings are exacerbating housing supply or affordability issues).

Data Source: The ACS provides the most recent data based on a sample of Eugene households. The 2000 and 2010 Decennial Census data is older but is from a survey of all households in Eugene. While there are other sources for vacancy rates, the ACS data is consistently available and is the source used here.

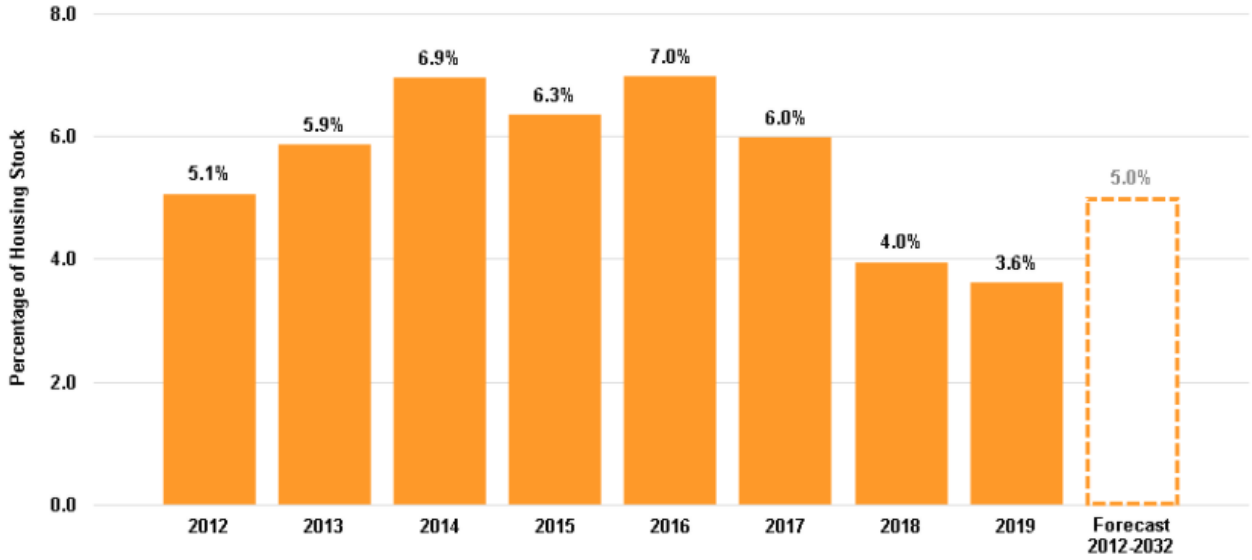
Relationship to UGB land supply and demand model: This is a **direct input** into a land supply and demand model and is an adopted assumption of 5% vacancy rate for new dwellings. The number of new dwellings to plan for is increased by a certain percentage to allow for some portion of the new housing stock to be vacant and allowing for the typical movement of households.

There are a variety of factors that impact vacancy rate such as the availability of land for more development, population growth and barriers to development, however, there is no single reasonable housing policy change that the City can make that directly affects the vacancy rate.

Takeaway: According to the ACS, the vacancy rate decreased from 6% in 2017 and 4% in 2018 to 3.6% in 2019. The average vacancy rate has been higher annually over the 2012-2019 monitoring period (5.6%) than the 2012-2032 average forecast (5.0%) and slightly higher than the 2000 Decennial (5.4%) and 2010 Decennial (5.0%). **In 2018 and 2019 there was a noteworthy decrease in average vacancy rate, which is consistent with what local appraisers and realtors have anecdotally reported, that vacancy rates for multi-family during the past few years have been lower than 5% resulting in a tight rental and home buying market**. Note that the margin of error for this ACS data is very high. In 2012, it was +/-30%, so the vacancy rate could have ranged between 3.5%-6.6% and in 2019 it was even higher at +/-50%, so the vacancy rate range was between 1.8%-5.4%.

[18] Historical Current Population Survey/Housing Vacancy Survey Changes, https://www.census.gov/housing/hvs/files/annual20/ann20src.pdf

Average Vacancy Rate - Eugene



Source: U.S. Census American Community Survey 1 Year Estimates, Table B25002; City of Eugene Planning and Development Department, Land Sufficiency Model January 2017

Household Assumptions - How affordable is the community?

Housing cost and affordability is a complex issue. Housing costs are driven partially by land costs and partially by infrastructure costs and generally by the costs of construction (labor, building materials). With a few exceptions, most of the opportunities for the City to influence housing costs are indirect. The City's influence largely lies with whether there is enough land to meet the housing needs, whether the land is zoned correctly and serviced, and how time and cost efficient the development process is, including if there are barriers to housing development in the land use code. The City can also offer incentives, like tax incentives or reduced building permit fees, to either make development less expensive or lower operational costs. The City can also contribute money (or other resources) directly to the development process but this is generally done to support development of regulated affordable[19] housing rather than market rate housing. Incentives vary in size and are most helpful when a development is near the edge of financial feasibility. Additionally, a household's ability to afford housing is not only due to the cost of housing but is an economic issue related to incomes and job availability. For UGB planning, this information provides helpful context regarding the types of housing needed to meet community needs.

[19] Affordable housing (sometimes called "income qualified housing") in this report refers to housing that is set aside for households earning no more than 80% of the Area Median Income. Different affordable housing efficiency measures may have different income caps.

Other jurisdictions are included for comparison; however, given the complexity and uniqueness of housing markets, significantly more analysis and context would be needed to understand the reason for the differences in one market compared to another. At a high level, Eugene's housing has typically been more expensive than nearby cities.

For historical context, some earlier data will be included such as Decennial Census data from 2000 and 2010.

Population in Poverty

Overview: *Population in Poverty* is the percentage of people living below the federal poverty level. The threshold for poverty varies based on the number of people and children in a household. The 2019 ACS identified a federal poverty level threshold of $25,926 for a family of two adults and two children.

Data Source: The ACS provides the most recent data based on a sample of Eugene households. This data is not available from the 2010 or future Decennial Census.

Relationship to UGB land supply and demand model: This is *not* a direct input into a land supply and demand model.

It does provide information about the housing needs of current residents of Eugene. These needs have a connection to the type and density of future housing but also are indicators of the need for policies to support development of housing that is affordable to low-income and moderate-income households. It also provides indirect information into what mix of housing types and densities to plan for, specifically regarding what types and densities of housing the community can afford and addresses consistency with the Statewide Planning Goal 10 requirement of providing housing that is affordable to all households in a community.

Takeaway: **The proportion of Eugene's population that is living in poverty decreased over the monitoring period as the national and local economy improved, from 27.6% in 2012 to 17.3% in 2019**. Over the longer term, the percentage in poverty in 2019 is about the same as it was in 2000 at 17.1%. A similar trend is experienced in both Lane County and Oregon, and this more recent decrease in poverty levels corresponds to the increase in median income as discussed below. However, the 2019 ACS population in poverty has more than a 10% margin of error (+/-14.3%) so the exact decrease of people living in poverty may not be as significant. The Office of Economic Analysis (OEA) also analyzed 2019 ACS poverty levels and race and ethnicity at the state level. OEA found "that **income gains and poverty declines are seen among Oregonians of all races and ethnicities. The racial poverty gap remains. There is more work to be done to address inequities. But the good news is the racial poverty gap is now the smallest on record in Oregon**, and poverty rates for Black, Indigenous, and People of Color have never been lower*, based on available data. **But this also means that BIPOC**

Oregonians now face poverty rates on par with what white Oregonians experienced during the worst of the Great Recession."[20]

Another measurement tool for community poverty levels is ALICE (Asset Limited, Income Constrained, Employed), which is a new way of defining and understanding the struggles of households that *earn above the Federal Poverty Level, but not enough to cover basic household expenses in the counties where they live*.[21] For Lane County, the most recent ALICE report (2018) indicates that 28% of households earned above the federal poverty rate but below the ALICE threshold. This means that a total of 45% of Lane County households are either earning less than the federal poverty level, or above the federal poverty level but still less than needed to afford the ALICE bare-bones household budget. For comparison, in 2018 the federal poverty level for a four-person family was $25,100, while the Household Survival Budget for a family with two adults, an infant, and a four-year-old was $75,768.13.[22] The percent of Lane County households above poverty but below the ALICE threshold has been 26-28% since at least 2010, and these percentages are similar to the State's over the same period. Additionally, as another indicator of economic challenges in Lane County and Oregon, in 2017 54% of students in Lane County and 52% of students in Oregon were eligible for free and reduced priced meals. [23]

More recently, the COVID-19 pandemic brought economic, healthcare, and education-related shortcomings into the limelight nationwide and had a higher impact on households that were already vulnerable and struggling to afford household necessities. Federal stimulus payments may have benefited some households to fill the gap but did not provide any long-term financial stability. So, while the 2019 ACS data looks positive, the effects of the pandemic on poverty levels are not present in the most current data but will start to be seen in the 2020 Decennial Census data and over the coming years.

[20] https://oregoneconomicanalysis.com/2020/09/17/oregon-poverty-and-progress-2019-edition/ September 2020

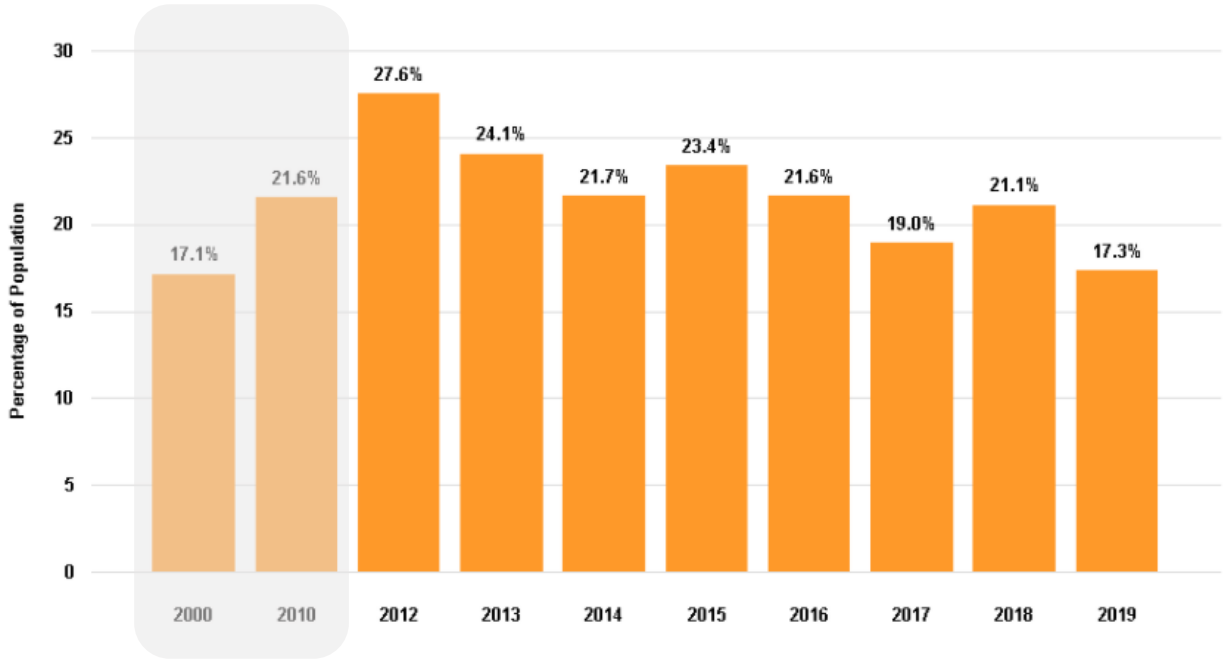
[21] The ALICE Household Survival Budget is the bare minimum cost of household basics necessary to live and work in the modern economy. These basic budget items include housing, childcare, food, transportation, technology (smartphone plan), and health care, plus taxes and a contingency fund (miscellaneous) equal to 10% of the household budget. The ALICE Threshold represents the minimum income level necessary for survival for a household. Derived from the Household Survival Budget. https://www.unitedforalice.org/home

[22] https://www.unitedforalice.org/county-profiles/oregon

[23] https://static1.squarespace.com/static/587bc89edb29d69a1a2839f2/t/5d0949cedd550400010eb9c0/1560889807295/LaneFactSheet.pdf, Oregon Hunger Taskforce; data is based on calendar year 2017.

Population in Poverty - Eugene

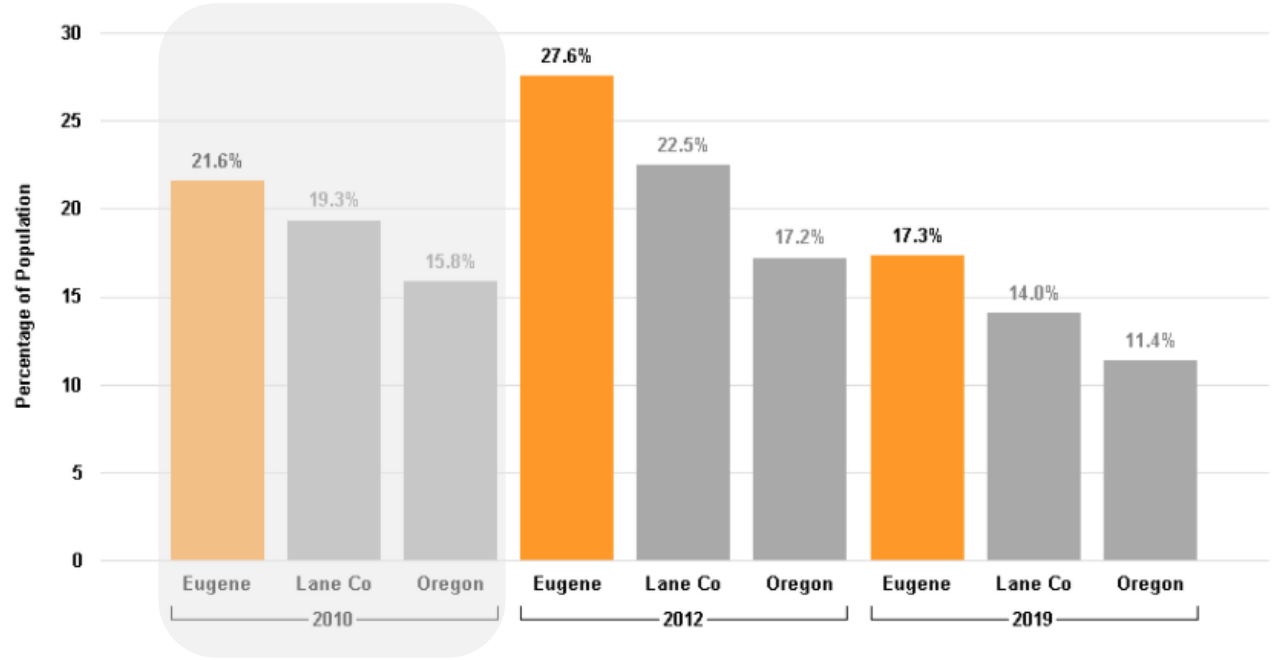
Poverty statistics are for year prior to indicated census year.



Source: U.S. Census American Community Survey 1 Year Estimates, Table B17001; U.S. Census 2000, SF3 Table P87

Population in Poverty

Poverty statistics are for year prior to indicated census year.



Source: U.S. Census American Community Survey 1 Year Estimates, Table B17001

Median Household Income and Median Family Income

Overview: Income refers to income received on a regular basis, such as income from wages, investments, rental property, alimony, social security payments, and others rather than overall wealth, such as savings or home equity. Median Household Income is the mid-point where half of households have incomes above the median and half have incomes below the median. Median *household* income is used instead of median *family* income because median household income includes all households not just households where the members are related. Median household income is typically lower than median family income because it includes single-person households.

Data Source: The ACS provides the most recent data based on a sample of Eugene households. This is not available from the Decennial Census. The ACS sample size is not an issue for this data set because *median* is 100% of all households in the sample (not a % of the households in the sample).

Relationship to UGB land supply and demand model: This is *not* a direct input into a land supply and demand model.

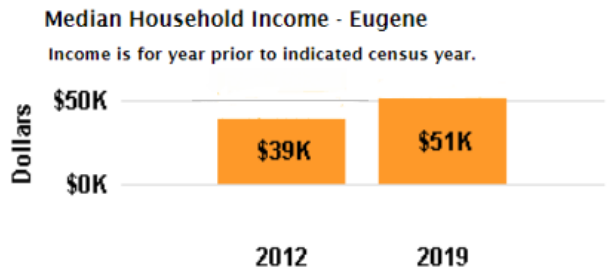
It does provide information about the housing needs of current residents of Eugene. These needs have a connection to the type and density of future housing but also are indicators of need for policies to support development of housing that is affordable to low-income and moderate-income households.

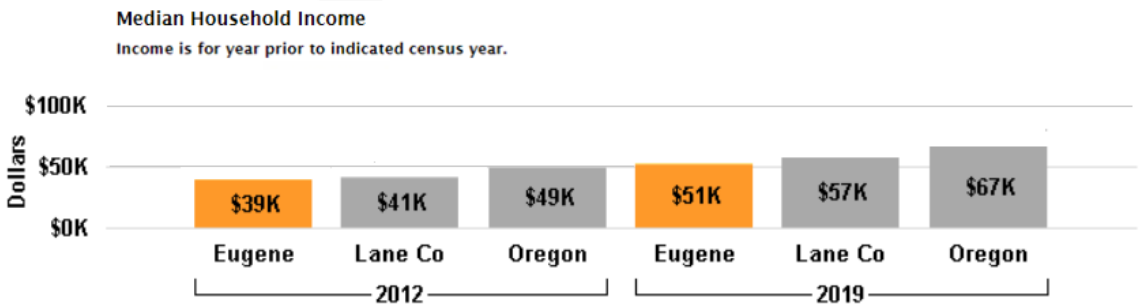
Takeaway: There was a **31% increase in Eugene's median household income between 2012 ($39,150) and 2019** ($51,269) (not adjusted for inflation). This increase over the monitoring period coincides with a decrease in poverty rates and is similar to trends experienced in Lane County (39% increase) and Oregon (36% increase).

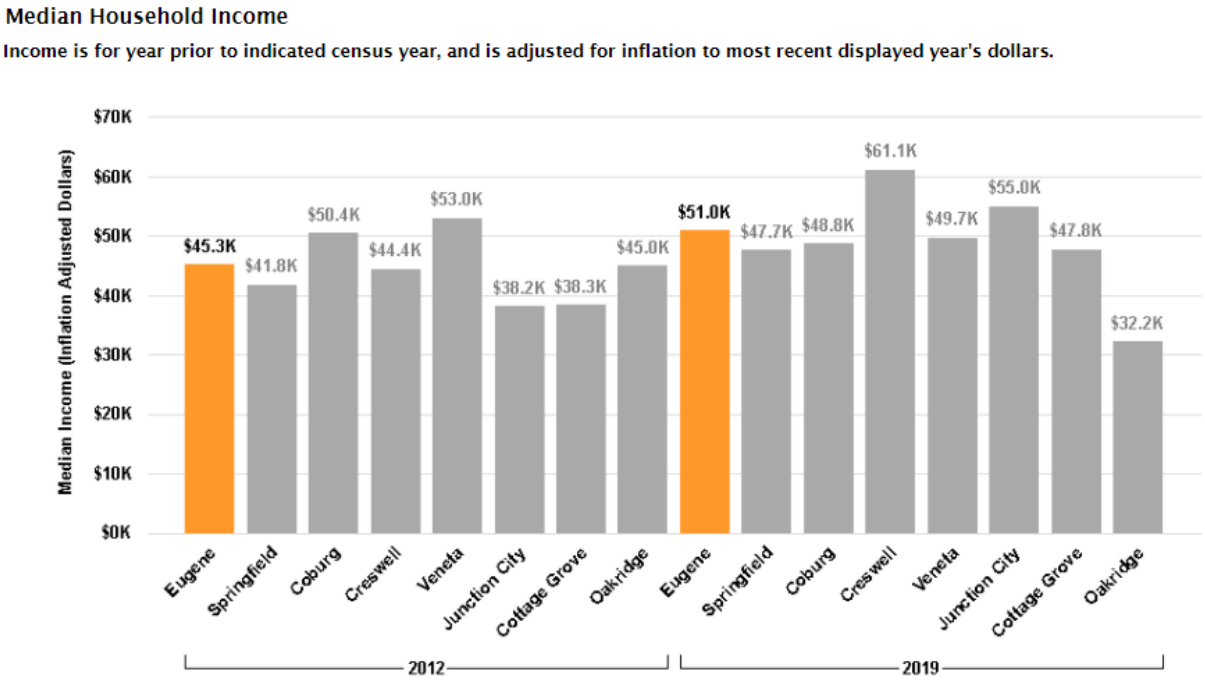
Surrounding Lane County cities have experienced a mix of changes in median income. Over the monitoring period, Eugene, Springfield, Creswell, Junction City, and Cottage Grove had an increase in median income, while Coburg, Veneta, and Oakridge had a decrease. Eugene has the most jobs and the most residents compared to other nearby cities and household income is higher than most of the near-by cities.

Another way to look at the income per household is to look at median *family* income. Median household income includes all people living in a household together versus median family income, which includes the earnings of all people in one's family. Median family income is typically higher than median household income because of the composition of households, for example, multiple students may live together and make very little or no money. Eugene being a college town, student-only households are likely driving down the overall median household income. Median household income also includes single-person households, unlike median family income. The ACS data for Eugene's median family income ($84,543 in 2019),[24] has been much higher than household income throughout the monitoring period.

[24] 2019: ACS 1-Year Estimates Detailed Tables, https://data.census.gov/cedsci/table?q=median%20family%20income&text=B19113&g=1600000US4123850&tid=ACSDT1Y2019.B19113







Source: U.S. Census American Community Survey 5 Year Estimates, Table B19013

*Note: This third chart uses 5-year ACS data to compare Eugene to nearby cities because annual data is not available for smaller communities. The first two charts use 1-year ACS data to compare Eugene, Lane County, and Oregon data annually.

Median Sales Price of Single-Family Housing by City

Overview: Median sales price of single-family housing is the mid-point where half of single-family houses were sold above the median and half were sold below the median. Single-family housing sales include single-family detached, single-family attached and manufactured homes.

Data Source: Data provided by the County Tax Assessor's Office in the Regional Land Information Database (RLID) maintained by Lane Council of Governments. Data is filtered to city limits as identified in RLID.

Sales data is complex and difficult to automate results. The data for this set of charts was filtered (or not) to reasonably address these issues, but it is recognized that some data quality issues will remain.

- Non-arm's length sales (sales between known parties for nominal values) have been included. Because these sales are often lower than a standard sale, they can lower the median. Determining the threshold for excluding these sales is complex and including them is a better representation of all sales.
- Duplicate sales entries are excluded from the data by using the sales recording number to only count the sale once. A single sale associated with multiple taxlot accounts has the same sales price and same sales recording number repeated for each account. In those cases, the sale is only attributed to the largest taxlot and the remaining accounts are excluded.
- All sales that did not have a recording number are included. These sales are most likely private property mobile home transfers, which do not get recorded and thus do not have a recording number. However, that means it is possible that there are duplicate sales without recording numbers included. It is also possible that a single sale may have received more than one recording number for clerical purposes, which would result in counting a sale more than once.
- Some sales occur for multiple properties that are not adjacent to each other. For example, a single sale to the same buyer may include a property in Eugene and a property in Springfield but the same recording number is used for both properties. Sales in different cities with the same recording number have been excluded. On the other hand, for sales of multiple properties within the same city, the sale attributed to the largest taxlot was included and all others were excluded (this would inflate the sales price for the included property, as the price is meant for multiple properties).

During the previous UGB analysis, the City used the US Census median housing value of occupied single-family dwellings as a proxy for single-family dwelling sales price data. However, the housing values from the Census are estimated by the person responding to the Census, reflecting the homeowner's perception of the value of the house, not the actual sales price of the house. The RLID data is the actual sales price as recorded with Lane County, however it is acknowledged that the date the sale was recorded at the County may differ significantly (e.g., be later) from the date the sale occurred.[25] Sales prices have not been adjusted for inflation.

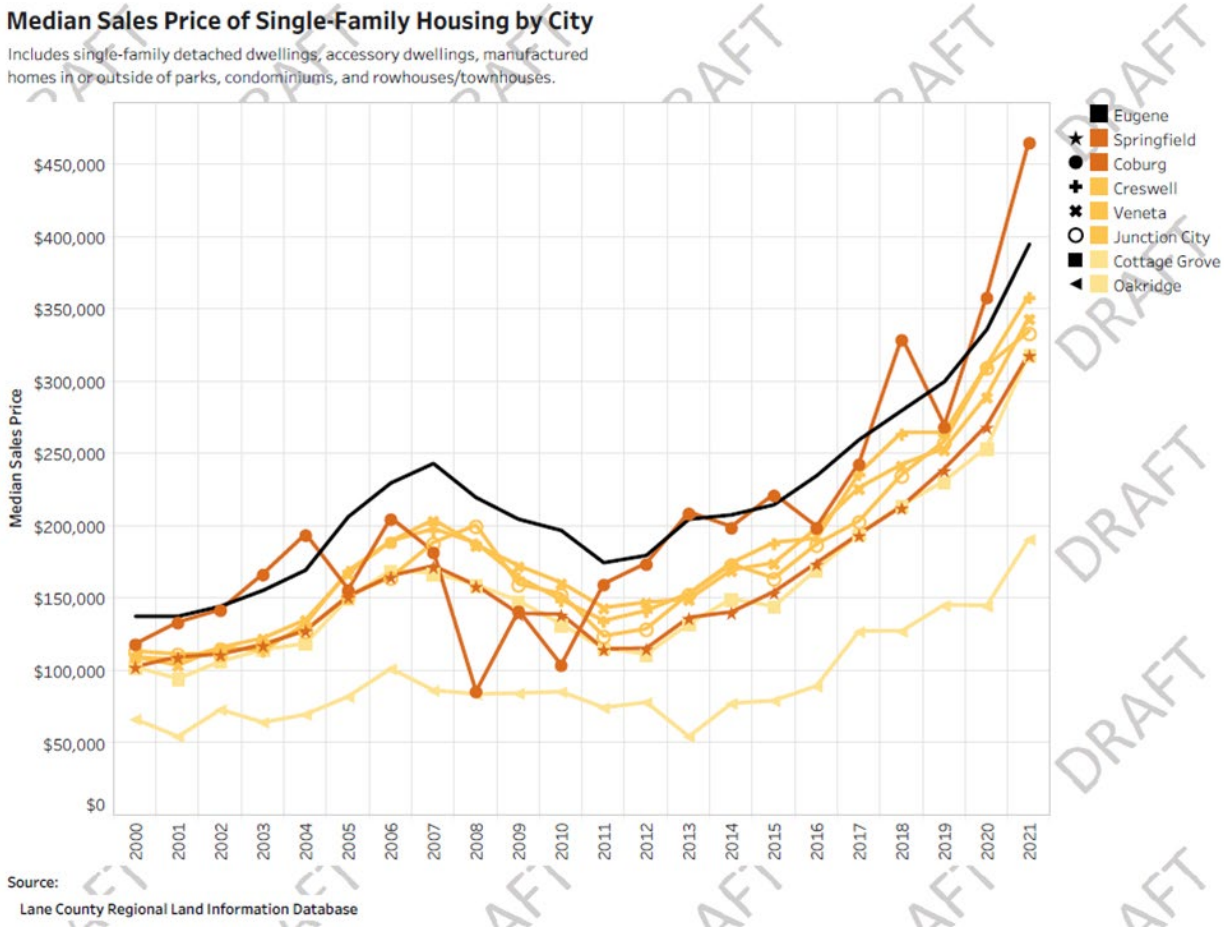
[25] Regional Multiple Listing Service (RMLS) also provides a median house sales price based on the date the contract is signed, however this data would only include sales that are conducted through RMLS services.

Relationship to UGB land supply and demand model: This is *not* a direct input into a land supply and demand model. It does provide information about the housing needs of current residents of Eugene. These needs have a connection to the type and density of future housing and are also indicators of need for policies to support development of housing that is affordable to low-income and moderate-income households.

Takeaway: **The median sales price for single-family housing (detached and attached) in Eugene has increased over the monitoring period from $180,000 in 2012 to $395,000 in 2021, an increase of 119% and an annual average increase of 9.2%.**[26] Between 2020 and 2021, the median sales price increased 17.6%. Over the longer term, the median sales price has increased 186% from 2000 ($138,000) to 2021 ($395,000).

After the recession in the late 2000s, Eugene and the surrounding cities on the chart below have experienced a steady increase in median single-family housing sales price since about 2012. All other cities on the chart had a higher percent increase in single-family median sales price than Eugene during the monitoring period (2012-2021). While Eugene's increase was a whopping 119%, Springfield had a 176% increase and Cottage Grove had a 186% over the same years.

[26] Full year data, sales recorded during 2012 or during 2021.



Median Sales Price by Housing Type

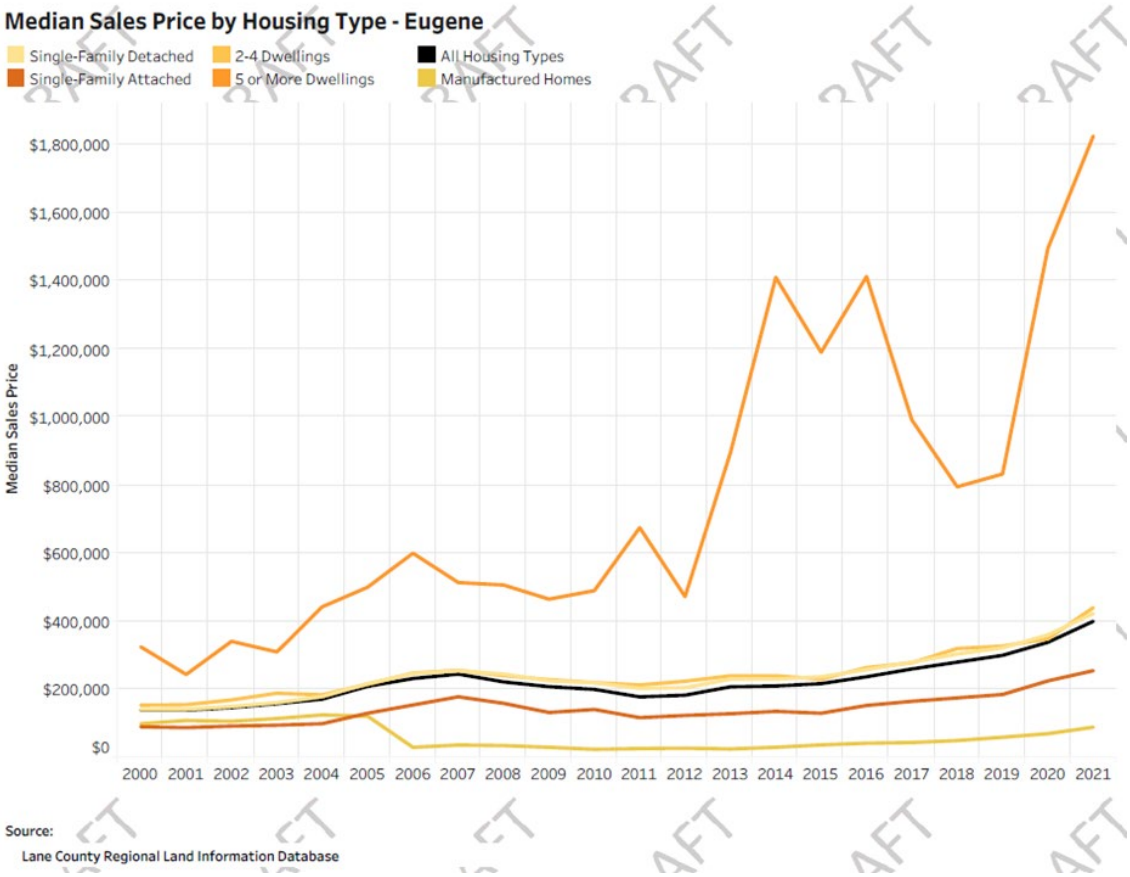
Overview: Median sales price by housing type is the mid-point where half of dwellings by housing type were sold above the median and half were sold below the median. Housing types include single-family detached, single-family attached, manufactured homes, two to four dwellings, and five or more dwellings. The median for all housing types is also included for comparison.

Data Source: Same as *Median Sales Price of Single-Family Housing by City*.

Relationship to UGB land supply and demand model: Same as *Median Sales Price of Single-Family Housing by City*.

Takeaway: The median sales prices of all housing types in Eugene have increased over the monitoring period. **Housing with two to four dwellings increased** from a median sales price of $223,950 in 2012 to $440,000 in 2021, an increase of **96%**. **Housing with five or more dwellings increased** from $472,500 in 2012 to $1,825,000 in 2021, an increase of **286%**. Note that there are significantly fewer sales of the five or more dwellings housing type, which results in a more erratic median sales price over the years.

The overall increase of all housing types was 119% between 2012 ($183,000) and 2021 ($400,000).



Housing sales from additional sources provide similar information:

- Median home prices have increased by about 130% between 2000 and 2019 in both Eugene and Springfield, reaching $320,000 in Eugene and $270,100 in Springfield (Zillow October 2019).[27]
- Over the last five years (September 2016-2021) median single-family dwelling sales prices have increased 64% from $263,500 to $432,000 (Redfin https://www.redfin.com/city/6142/OR/Eugene/housing-market).[28]
- Over the last five years (September 2016-2021) median condo/co-op sales prices have increased 60% from $160,000 to $255,000 (Redfin https://www.redfin.com/city/6142/OR/Eugene/housing-market).
- A recent study by ECONorthwest for the City's Middle Housing project estimated that sales prices for the ownership of middle housing range from $230,000 to $485,000 per dwelling and from $1,500 to $2,900 per month for rental housing. By comparison, in the past year new

[27] Eugene-Springfield 2020 Consolidated Plan.
[28] For sales data, Redfin includes RMLS, homes in foreclosure, and homes for sale by owner (from Fizber.com and FSBO.com). The data excludes non-arm's-length transactions.

single-family detached housing has sold for between $250,000 and more than $1,000,000 in Eugene, while newer single-family rental housing typically rents for $1,700 to $3,000. Sales prices and rents tend to be lower for attached housing than for comparable detached housing.

Median Gross Rent

Overview: Median gross rent is the mid-point where half of households that rent pay rents that are above the median and half pay rents below the median.

Data Source: The ACS provides the most recent data based on a sample of Eugene households. This data is not available from the 2010 or future Decennial Census. Rent has not been adjusted for inflation. The UGB analysis also considered "contract rent" amounts but it is excluded from monitoring because it does not include the cost of utilities as gross rent does.

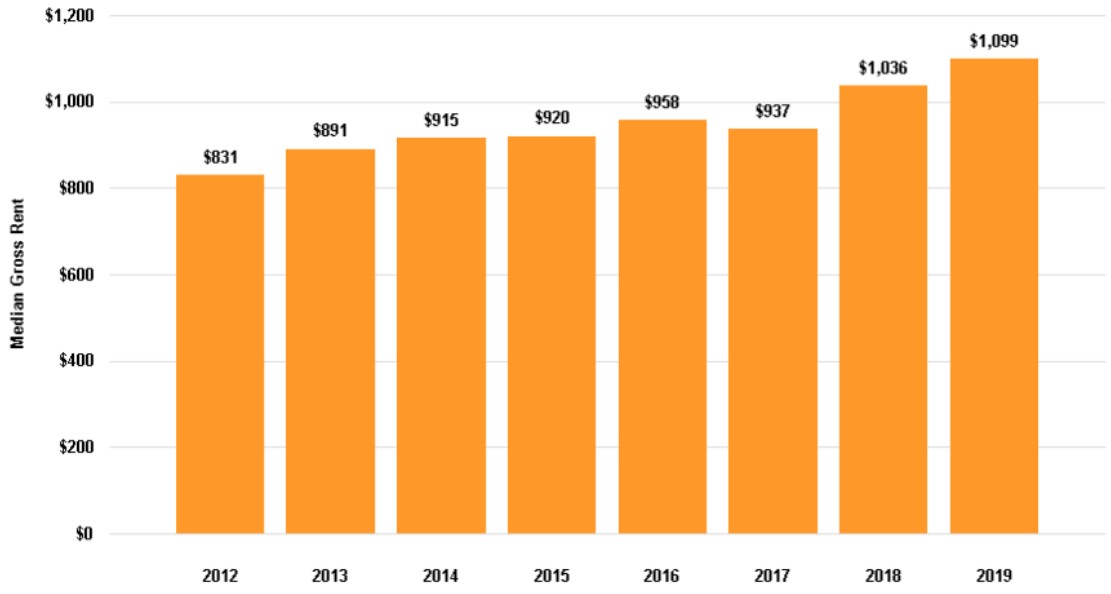
Relationship to UGB land supply and demand model: This is *not* a direct input into a land supply and demand model.

It does provide information about the housing needs of current residents of Eugene. These needs have a connection to the type and density of future housing but also are indicators of need for policies to support development of housing that is affordable to low-income and moderate-income households.

Takeaway: **Eugene's median gross rent (not adjusted for inflation) has increased 32% over the monitoring period** from $831 in 2012 to $1,099 in 2019, **with an annual average increase of 4.2%**. Over the longer term, median gross rent has increased 77% from 2000 ($621) to 2019, an average annual increase of 3.0%.

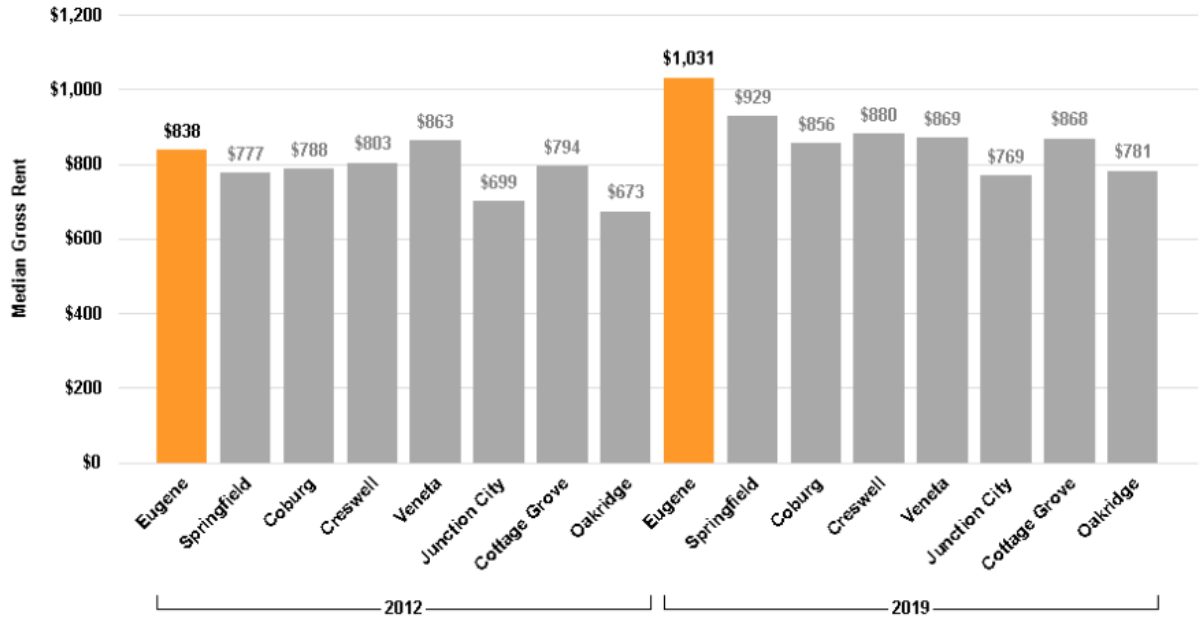
Median gross rent has been on an upward trend in Eugene, Lane County, and the nearby Lane County cities. Oregon has experienced an even higher increase in median gross rent.

Median Gross Rent - Eugene



Source: U.S. Census American Community Survey 1 Year Estimates, Table B25064

Median Gross Rent



Source: U.S. Census American Community Survey 5 Year Estimates, Table B25064

*Note: This chart uses 5-year ACS data to compare Eugene to nearby cities because annual data is not available for smaller communities. The first chart above 1-year ACS data to compare Eugene data annually.

Comparison of House Value to Income

Overview: This chart compares the value of owner-occupied dwellings and median incomes described above to give an overall sense of whether incomes are keeping pace with the cost of purchasing a dwelling to live in. The value from the Census is estimated by the owner of how much it would sell for if on the market. The Census indicates this is for any type of owner-occupied housing (e.g., single-family detached, townhome, condominium dwelling if the owner lives there), however owner-occupied dwellings are predominately single-family detached (see *Owner and Renter Households by Tenure and Housing Type* above).

Data Source: For both data sources, the ACS provides the most recent data based on a sample of Eugene households. RLID data is not used in this case for the value of housing so that the data sources compared here are the same. However, it is noted that **ACS owner occupied housing value is the value of the housing as estimated by the owner**. This data is not available from the 2010 or future Decennial Census. Income and house value have not been adjusted for inflation in order to have an equal comparison.

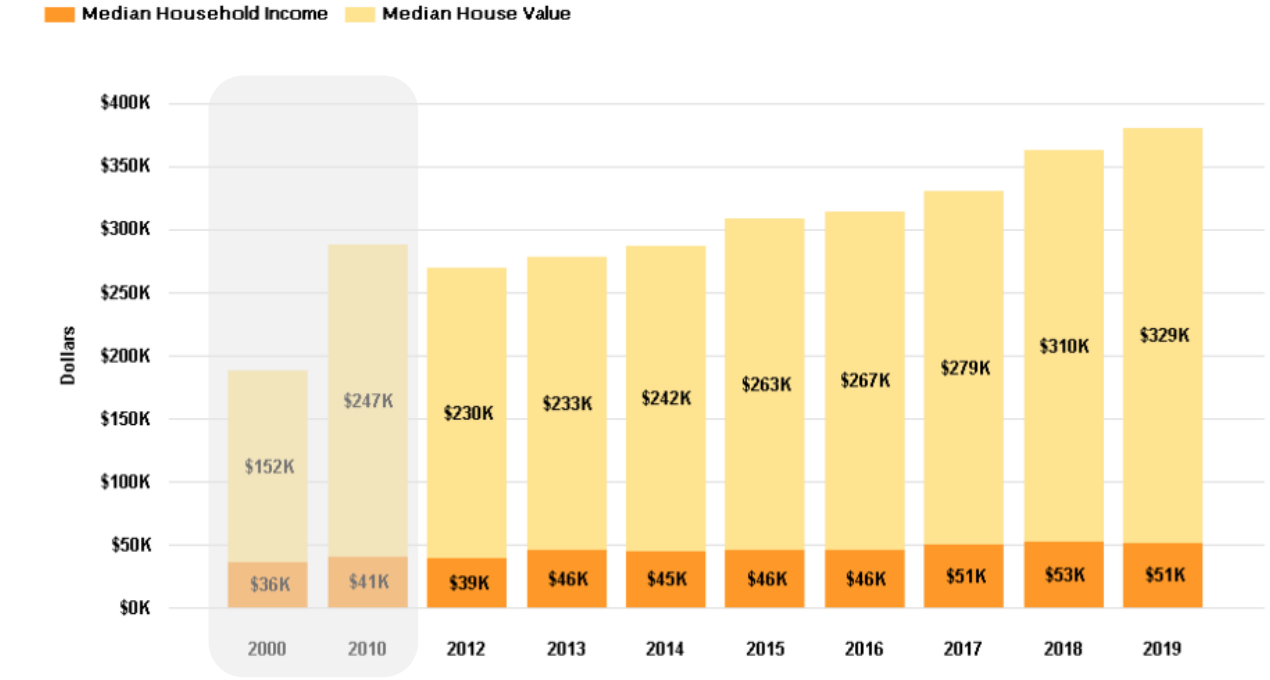
Relationship to UGB land supply and demand model: This is *not* a direct input into a land supply and demand model.

It does provide information about the housing needs of current residents of Eugene. These needs have a connection to the type and density of future housing but also are indicators of need for policies to support development of housing that is affordable to low-income and moderate-income households.

Takeaway: **According to the ACS, the value of Eugene's owner-occupied housing has increased 43% compared to incomes increasing only 31% over the monitoring period of 2012-2019** (neither data set is adjusted for inflation in this chart). Over the same period, Oregon had an even bigger gap, with owner-occupied housing value increasing 58% statewide compared to a 36% increase in income. Lane County's owner-occupied housing value and income increased relatively equally, with a 42% increase in housing value compared to a 39% increase in incomes.

Comparison of House Value to Income - Eugene

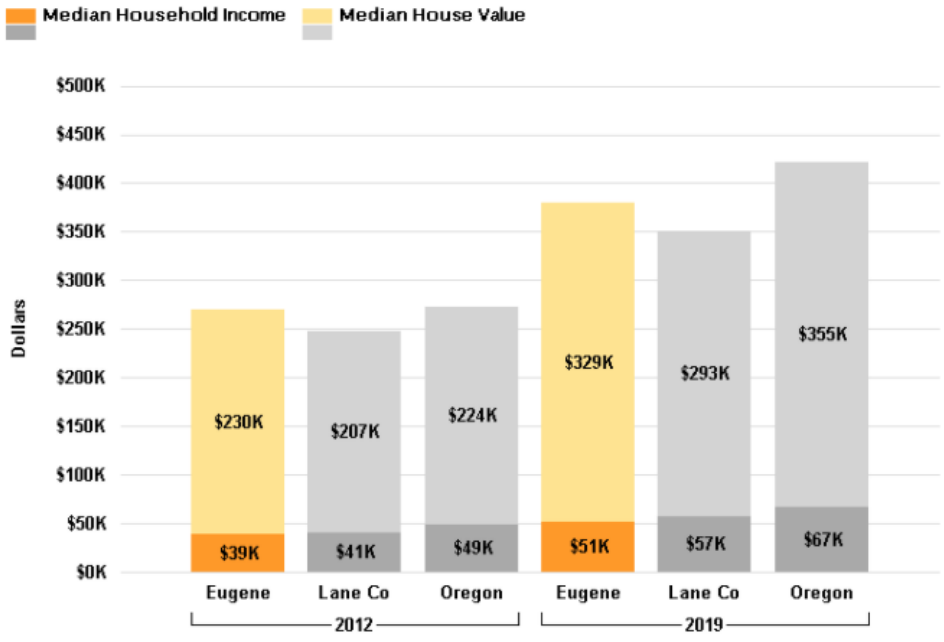
Income is for year prior to indicated census year.



Source: U.S. Census American Community Survey 1 Year Estimates, Tables B19013/B25077; U.S. Census 2000, SF3 Tables P53/H76

Comparison of House Value to Income

Income is for year prior to indicated census year.



Source: U.S. Census American Community Survey 1 Year Estimates, Tables B19013/B25077

Ratio of House Value to Income

Overview: This is another way to compare owner-occupied housing costs and income described above to give an overall sense of whether incomes are keeping pace with the cost of purchasing a dwelling to live in, showing how many more times the median value of owner-occupied housing is compared to the median household income in the same year or how many of a full year's worth of median income it would require to buy this dwelling (according to the owner's estimate of value, excluding interest).

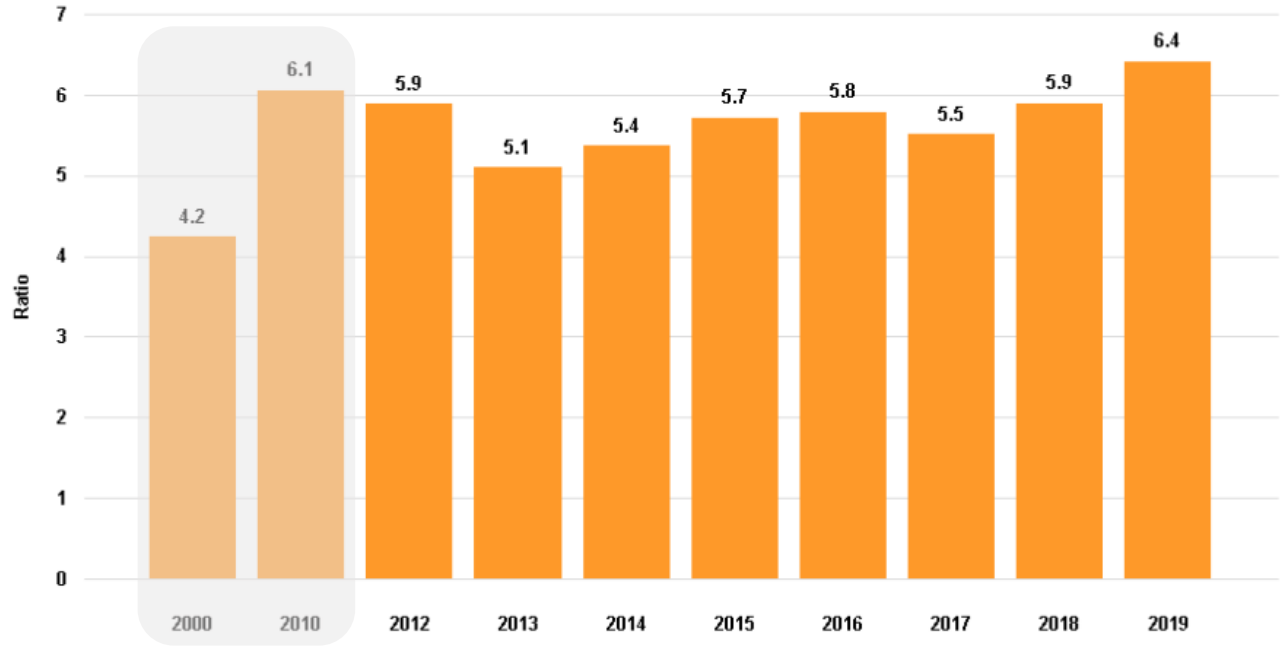
Data Source: Same as *Comparison of House Value to Income*.

Relationship to UGB land supply and demand model: This is *not* a direct input into a land supply and demand model. Same as *Comparison of House Value to Income*.

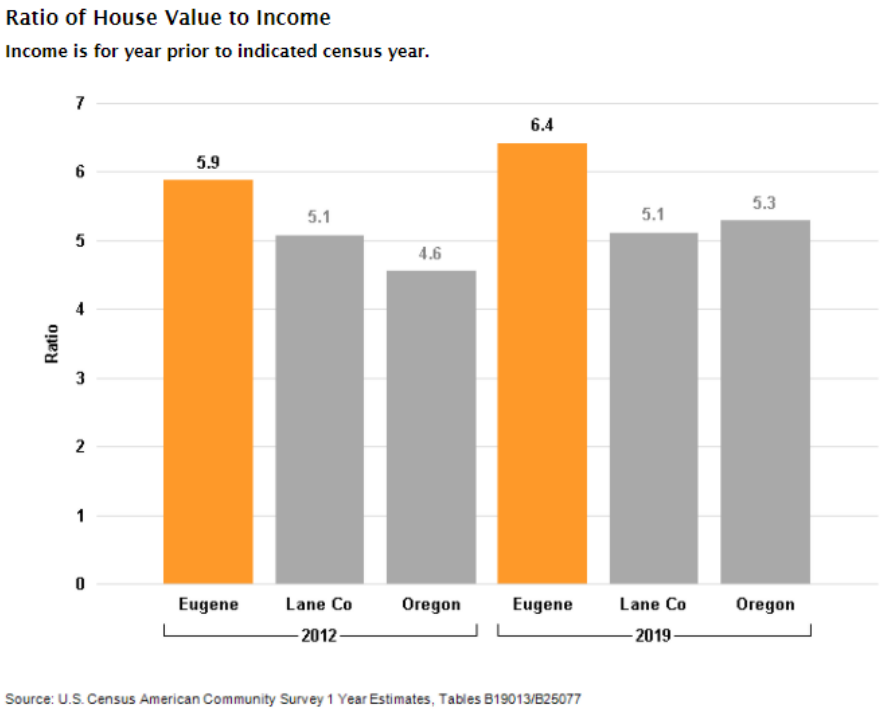
Takeaway: According to the ACS, **Eugene's median owner-occupied housing value ranged between 5.1 to 6.4 times the median income over the monitoring period**, near the rate of 6.3 at the time of the UGB analysis. More importantly, over the longer term, Eugene's median housing value has increased from costing 4.2 times income in 2000 to 6.4 times in 2019. Lane County overall has experienced little change over the monitoring period with housing value costing about 5.1 times that of income in 2012 and 2019, but over the long-term is up from 3.8 times that of income in 2000. Oregon as a whole had the biggest increase (15%) between 2012 and 2019, from housing value costing 4.6 times that of income in 2012 to 5.3 times in 2019.

Ratio of House Value to Income - Eugene

Income is for year prior to indicated census year.



Source: U.S. Census American Community Survey 1 Year Estimates, Tables B19013/B25077; U.S. Census 2000, SF3 Tables P53/H76



Source: U.S. Census American Community Survey 1 Year Estimates, Tables B19013/B25077

Percentage of Renter Monthly Income Spent on Rent

Overview: This is a way to compare rent costs and income described above to give an overall sense of whether incomes are keeping pace with rents.

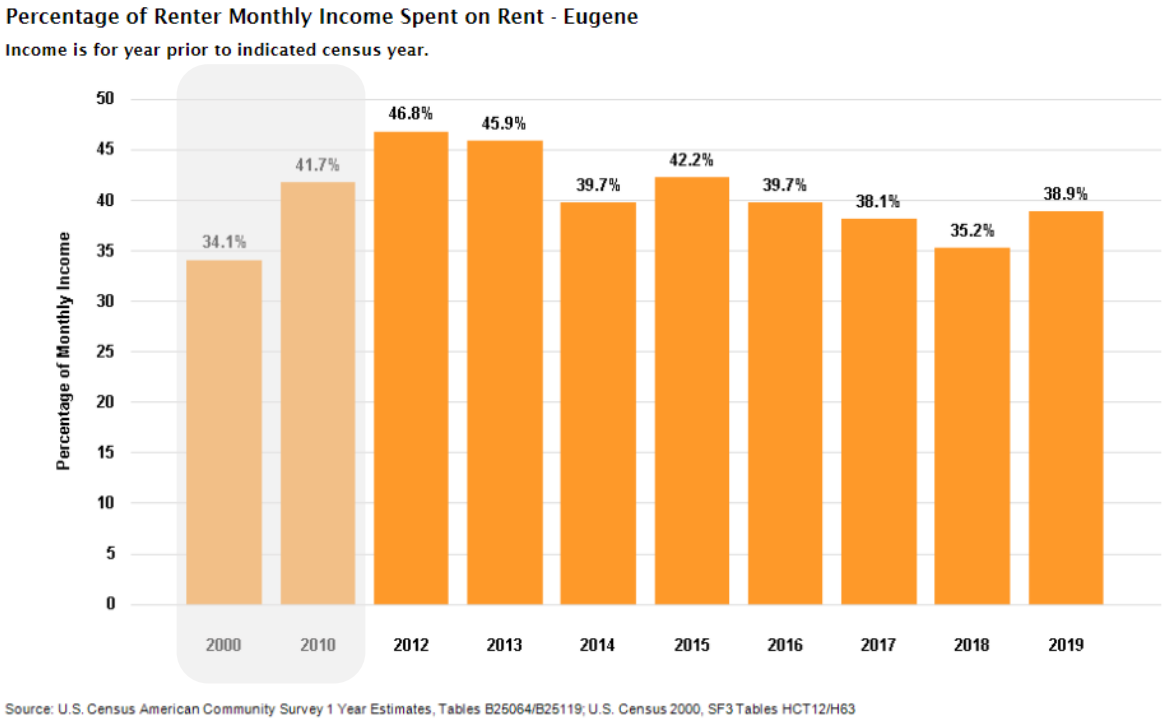
Data Source: For both data sources the ACS provides the most recent data based on a sample of Eugene households. This data is not available from the 2010 or future Decennial Census. This information has not been adjusted for inflation. While rent was considered in several ways during the UGB analysis, this metric was not one of them.

Relationship to UGB land supply and demand model: This is *not* a direct input into a land supply and demand model and was not collected during the previous UGB analysis.

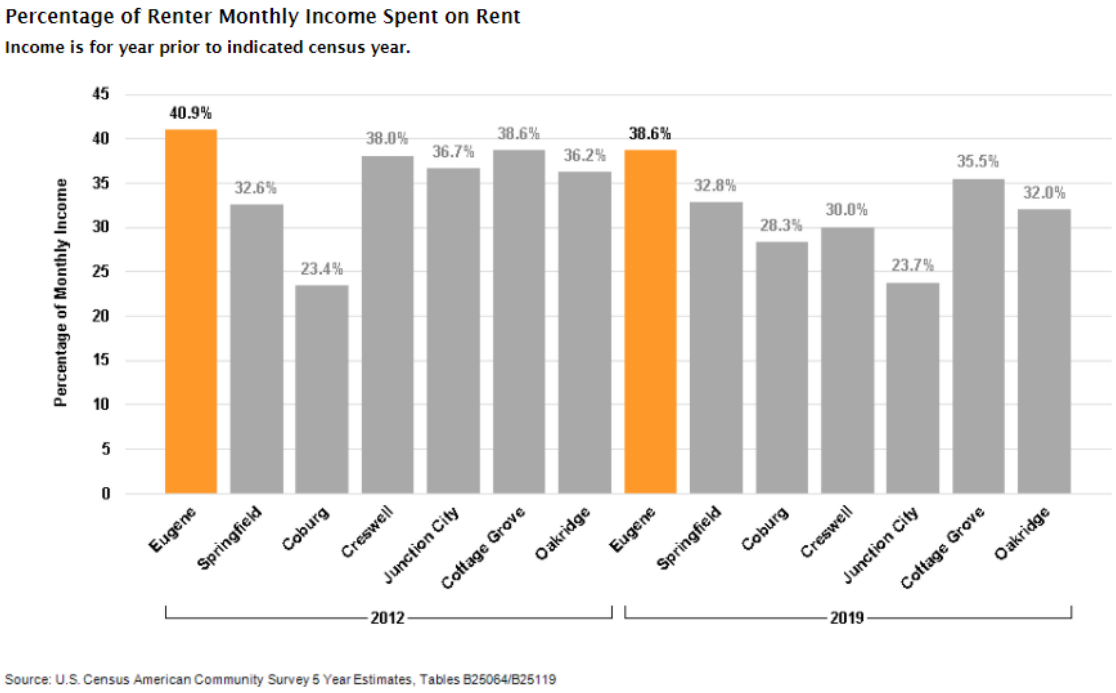
It does provide information about the housing needs of current residents of Eugene. These needs have a connection to the type and density of future housing but also are indicators of a need for policies to support development of housing that is affordable to low-income and moderate-income households.

Takeaway: **The percentage of income Eugeneans spent on rent decreased over the monitoring period** from spending about 47% of income on rent in 2012 to spending 39% (still more than a third) in 2019 according to the 1-year ACS data, suggesting that new rental housing is keeping up with new demand, although with a higher margin of error in the ACS data this may not be the trend it appears to be. However, the less volatile 5-year ACS confirmed a decrease in percentage of renter monthly income spent on rent from spending about 41% of income on rent in 2012 to spending 39% in 2019, though there was less of a drastic change in the 5-year data.

While the percentage decreased, the overall percentage of income spent on rent is still high. **Eugene renters on average spent a higher percentage of their income on rent in 2012 and 2019 than renters in Oregon, and Lane County**, though on average renters in all three jurisdictions spent more than 30%. Eugene renters also spent more of their income on rent than nearby Lane County cities. Eugene's high percentage of student population likely impacts these averages because student households typically have lower incomes and therefore are spending more of their income on rent than other households.



Source: U.S. Census American Community Survey 1 Year Estimates, Tables B25064/B25119; U.S. Census 2000, SF3 Tables HCT12/H63



Source: U.S. Census American Community Survey 5 Year Estimates, Tables B25064/B25119

*The Percentage of Renter Monthly Income Spent on Rent uses 5-year ACS data to compare Eugene to nearby cities because annual data is not available for smaller communities. Veneta is not included in this chart because 2019 ACS data was not available for this jurisdiction. The first chart uses 1-year ACS data to compare Eugene data annually.

Cost Burdened Households & Cost Burdened Households by Tenure

Overview: Identifying how many households experience a housing "cost burden" is a typical standard used to determine how affordable housing is in a community. It assumes that a household should pay no more than a certain percentage of its income for housing, including payments and interest or rent, utilities, and insurance. The Department of Housing and Urban Development (HUD) guidelines indicate that households paying more than 30% of their income on housing experience "cost burden" and households paying more than 50% of their income on housing experience "severe cost burden." Cost burden is another way to measure the ratios of income and housing costs.

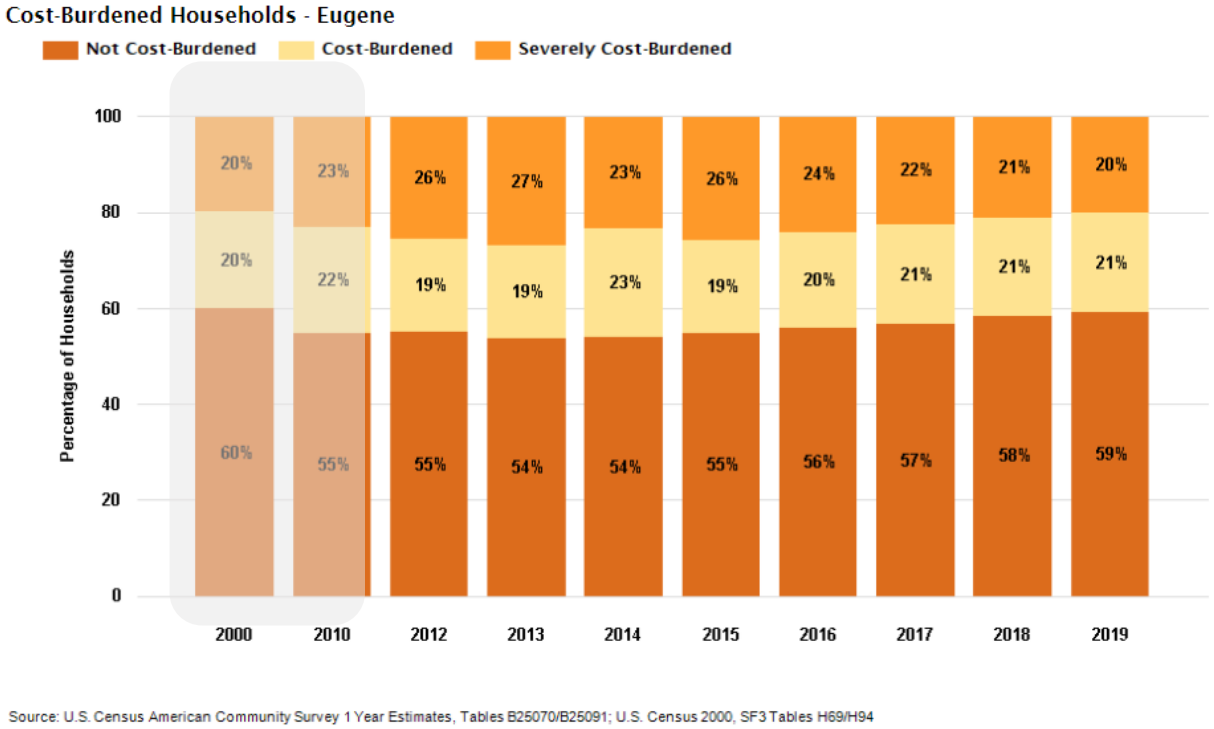
Data Source: The ACS provides the most recent data based on a sample of Eugene households. This data is not available from the 2010 or future Decennial Census. This information has not been adjusted for inflation.

Relationship to UGB land supply and demand model: This is *not* a direct input into a land supply and demand model.

It does provide information about the housing needs of current residents of Eugene. These needs have a connection to the type and density of future housing but also are indicators of need for policies to support development of housing that is affordable to low-income and moderate-income households.

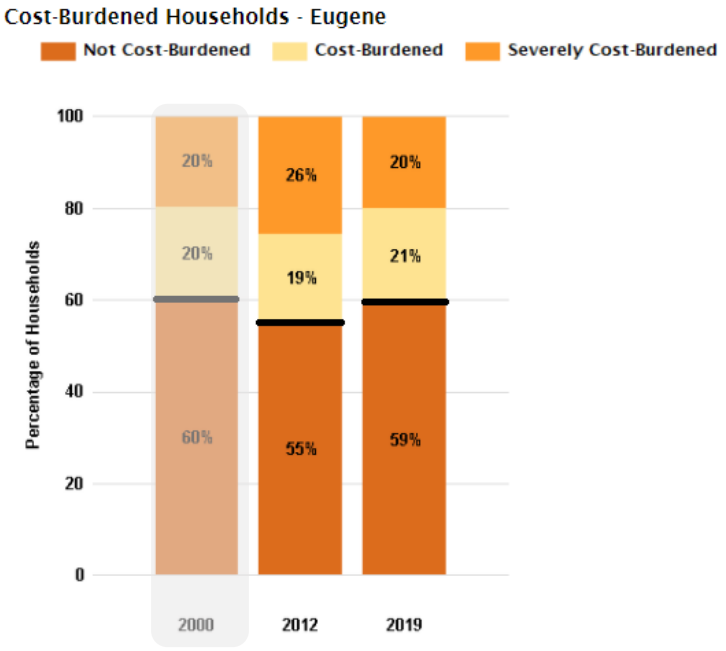
Takeaway: **For *all* households (renters and owners), the percentage of all Eugene households that are cost-burdened has slightly decreased over the monitoring period from 45% in 2012 to 41% in 2019**. In Oregon and nationwide there has also been a slight decrease in cost-burdened households during these years, which could be because the monitoring years were after a severe housing recession and the COVID-19 pandemic did not begin until 2020, but housing affordability remains a huge issue impacting many households nationwide. In 2019, the number of cost-burdened households nationwide was 37.1 million households, representing 30.2% of all households. Of these households, 17.6 million were severely cost-burdened, paying more than 50% of their income for housing.[29] Eugene continues to have an even higher percentage of cost-burdened households than the state and the country.

Households in most nearby Lane County cities had a decrease in cost-burdened households between 2012 and 2019, although Eugene typically had the highest percentage of cost-burdened households. Oregon is shown for comparison to Eugene instead of Lane County since Eugene households make up much of Lane County, which is also why it is not surprising Lane County overall also had a decrease in total cost-burdened households during the monitoring years.



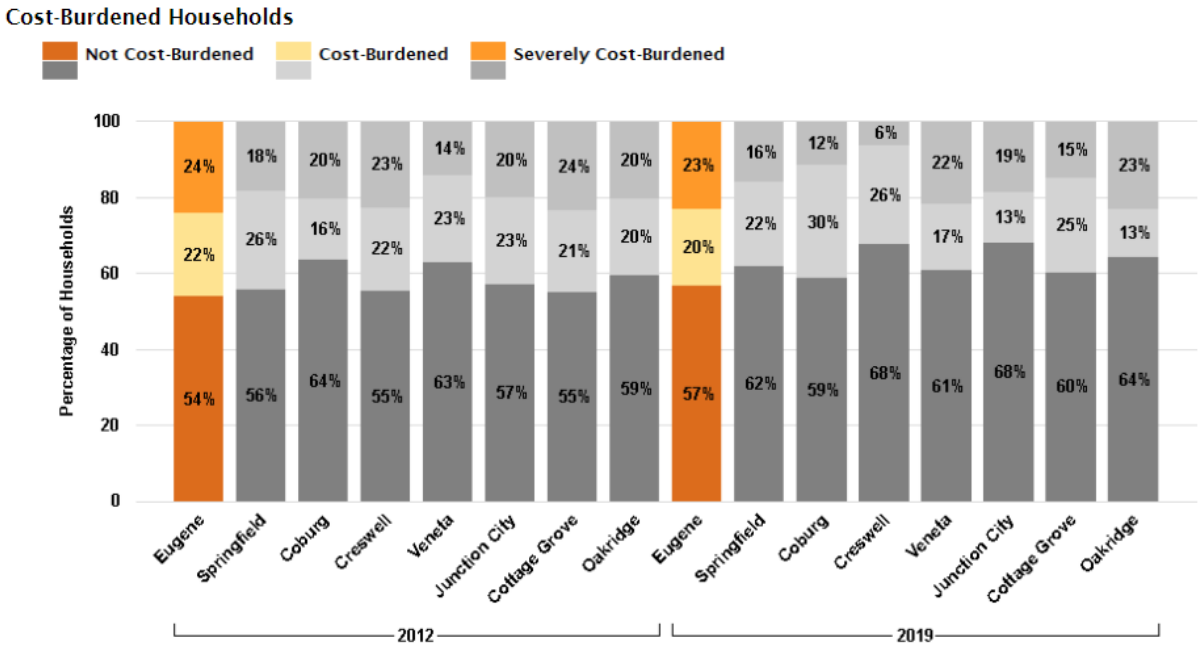
Source: U.S. Census American Community Survey 1 Year Estimates, Tables B25070/B25091; U.S. Census 2000, SF3 Tables H69/H94

[29] The State of the Nation's Housing 2020, Joint Center for Housing Studies of Harvard University, tabulations of US Census Bureau, American Community Survey 1-Year Estimates: https://www.jchs.harvard.edu/sites/default/files/reports/files/Harvard_JCHS_The_State_of_the_Nations_Housing_2020_Report_Revised_120720.pdf

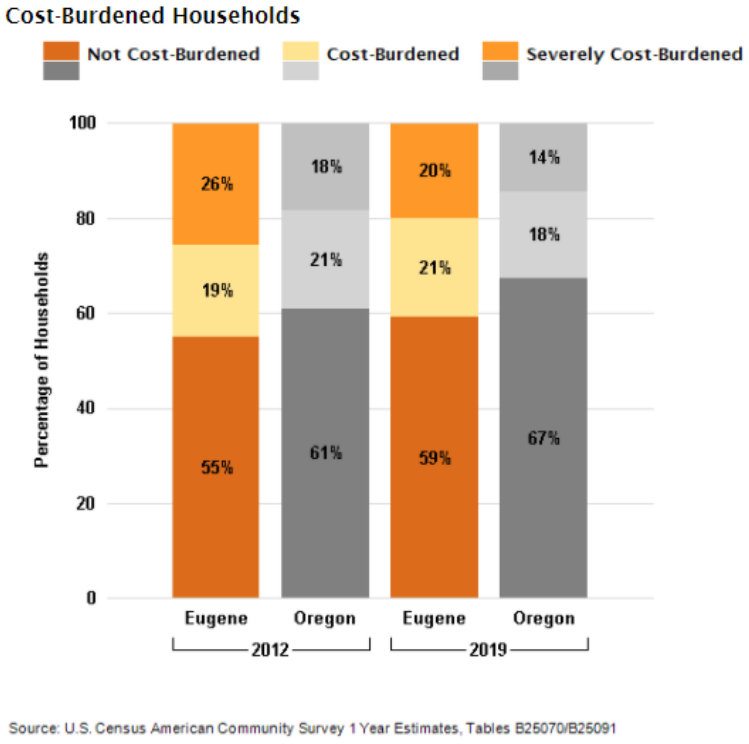


Source: U.S. Census American Community Survey 1 Year Estimates, Tables B25070/B25091; U.S. Census 2000, SF3 Tables H69/H94

*Percentage of cost burdened households shown from black line up.



Source: U.S. Census American Community Survey 5 Year Estimates, Tables B25070/B25091

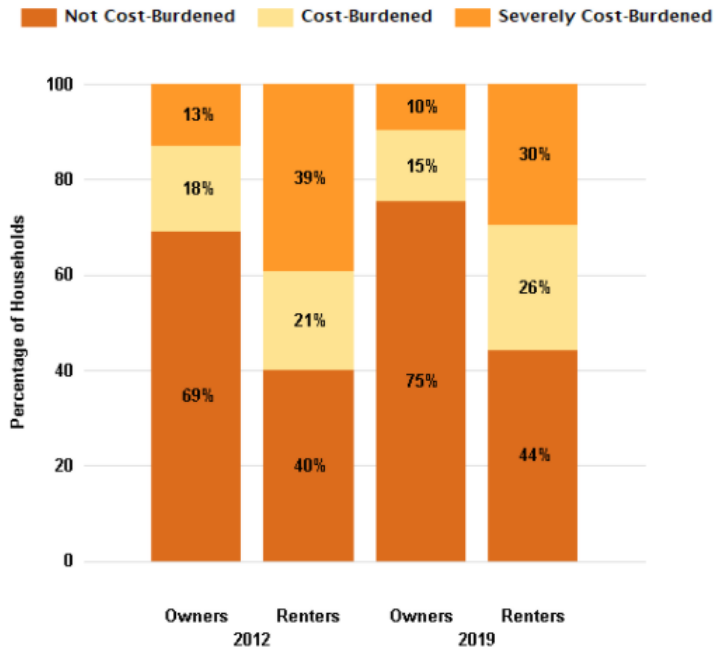


Source: U.S. Census American Community Survey 1 Year Estimates, Tables B25070/B25091

For *renter* households, more than half of Eugene renter households were cost-burdened ranging from 56-65% over the monitoring period. This is similar to during the UGB analysis with 64% of renter households cost-burdened in 2011. This is consistently higher than renters over all of Oregon, some of which is due to Eugene's larger college student population. **The percentage of cost-burdened renter households in both Eugene and Oregon decreased between 2012 and 2019, which corresponds with an increase in income and lower poverty levels**. Renters in nearby Lane County cities experienced a mixture of results between 2012 and 2019; just over 50% of Springfield renters were cost-burdened over the same period.

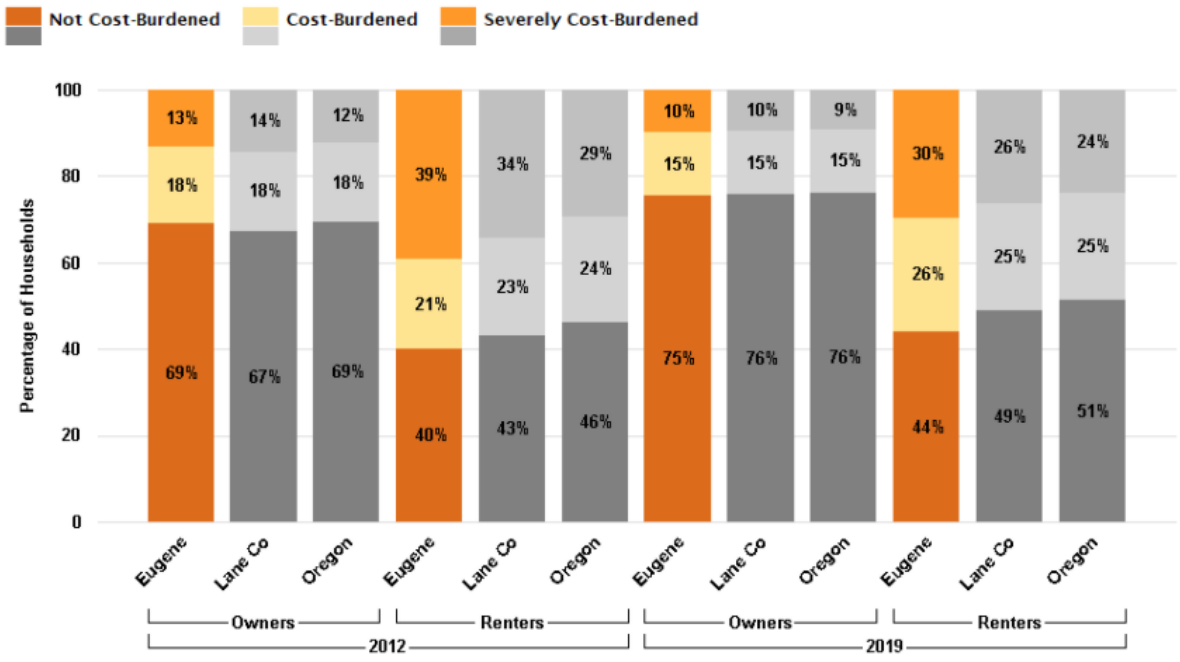
For *owner* households, in comparison to renters a significantly lower number of Eugene's owner households were cost-burdened, less than a third of households, ranging from 25-31% over the monitoring period. This number has decreased from 31% in 2012 down to 25% in 2019, the lowest percentage of the period. This is also a decrease from the UGB analysis at 33% in 2011. The percentage of owner cost-burdened households in Eugene was similar to both Oregon (24%) and Lane County (25%) totals at the end of the monitoring period, all have decreased during this period. Owners in nearby Lane County cities experienced a mixture of results between 2012 and 2019 (based on 5-year ACS data), though most had less or about the same of cost-burdened owner households than at the beginning of the monitoring period; Springfield cost-burdened owners went down from 37% to 27% over the same period.

Cost-Burdened Renters and Owners - Eugene



Source: U.S. Census American Community Survey 1 Year Estimates, Tables B25070/B25091

Cost-Burdened Renters and Owners



Source: U.S. Census American Community Survey 1 Year Estimates, Tables B25070/B25091

Households by Income Compared to Existing Dwellings by Affordability

Overview: This chart matches the number of households in Eugene grouped by income range to the number of existing dwellings in Eugene, categorized by which income range the dwelling would be affordable to for a household to pay no more than 30% of their income on the dwelling as recommended by HUD (households paying more than 30% on housing are considered housing cost-burdened). A mismatch is identified where the number of dwellings is lower than the number of households in the same income range.

Data Source: The ACS provides the most recent data based on a sample of Eugene households. This analysis uses ACS data regarding number of households, household income, housing value of owner-occupied dwellings, rent of renter-occupied dwellings, and the 30% cost-burden threshold. This data is not available from the 2010 or future Decennial Census. This information has not been adjusted for inflation.

Relationship to UGB land supply and demand model: This is *not* a direct input into a land supply and demand model.

It does provide information about the housing needs of current residents of Eugene. These needs have a connection to the type and density of future housing but also are indicators of need for policies to support development of housing that is affordable to low-income and moderate-income households.

Takeaway: According to 2019 ACS data, **Eugene's households that make less than $25,000 a year have a significant shortage of housing (about 10,345 dwellings)** in Eugene that could meet their needs without spending more than the recommended 30% of their income on housing. Households that make less than $50,000 per year could also have difficulty finding housing affordable for their income since the number of households and dwellings in that range are almost even. **There is also a mismatch for households making more than $100,000 (about 3,140 dwellings), particularly more than $150,000 and when there is a mismatch at either end of the income spectrum there are ripple effects elsewhere**; many households making less than $25,000 are obtaining or remaining in housing that costs more than they can afford paying (more than 30% of their income) and is affordable for the next higher income level, and some households making $100,000 or more are buying or remaining in housing that costs less than they can afford and is squeezing the availability of housing affordable to the next lower income brackets.

Affordability based on 30% of income
Source: US Census Americant Community Survey 1 Year Estimates, Tables B19001, B25075, B25063, B25003

Job Growth - How are Eugene's jobs growing?

Average Annual Employment Growth Rate

Overview: The average annual growth rate (AAGR) of new *covered* jobs is a good indicator of whether new jobs are being created at the rate expected. "Covered" employment is used here, meaning the jobs that are covered by unemployment insurance, and is used more often when reporting on jobs than total employment (covered plus uncovered jobs). While covered employment is a subset of total employment, employers regularly report covered employment to the State for Eugene and Lane County, whereas total employment is only available for Lane County and is not available at the city level.

Data Source: The growth rate is derived from the number of new covered jobs over time. Lane County's covered jobs are provided by the State of Oregon Employment Department (OED), Employment and Wages by Industry in the Quarterly Census of Employment and Wages (QCEW). The QCEW data is a quarterly count of employment and wages as reported by employers for workers covered by state unemployment insurance. Eugene's covered jobs estimates are also from the same source but are not readily available at the city level. Instead, to ensure the confidentiality of the data at a finer grain city level, city estimates must be calculated and aggregated in a manner that ensures no less than three business are in the same industry sector and no less than 80% of jobs in a sector are in one business. Currently, Lane Council of Governments is authorized to complete this analysis and can provide it to the City every other year. Note that more than half of Lane County's jobs are located in Eugene. The Adopted Forecast growth rate for Eugene was derived from the Oregon Employment Department's (OED) 10-year forecast for Lane County at that time. The "Current 10-year forecast" for Lane County is from OED's official most recent 10-year forecast, in this case in 2021, which is updated every few years.

Relationship to UGB land supply and demand model: An average annual growth rate of 1.43%, based on the State's forecast for employment growth for Lane County for 2012-2022, was assumed for Eugene and is a **key direct input** into the land supply and demand model.

Takeaway: The most recent data readily available for Eugene is 2018, so 2018 is used for comparing Eugene and Lane County in the chart below. The average annual employment growth rate for both Eugene and Lane County has been higher during 2012-2018 than Eugene's 2012-2032 forecast of 1.43%, with **Eugene at 3.13% growth rate and Lane County at 2.3%**, more than twice the forecast rate. Job growth can be cyclical and with a recession ending around 2010, it is not surprising that Eugene had high job growth in the following years, however, **that rate is unlikely to be sustained through the 2012-2032 planning period**. In fact, the most recent OED forecast for Lane County (2020) shows a slower projected growth rate of 1.4% for 2020-2030, matching Eugene's currently Adopted Forecast rate of 1.4% (and is up from the 2019 forecast for Lane County of 0.8%).

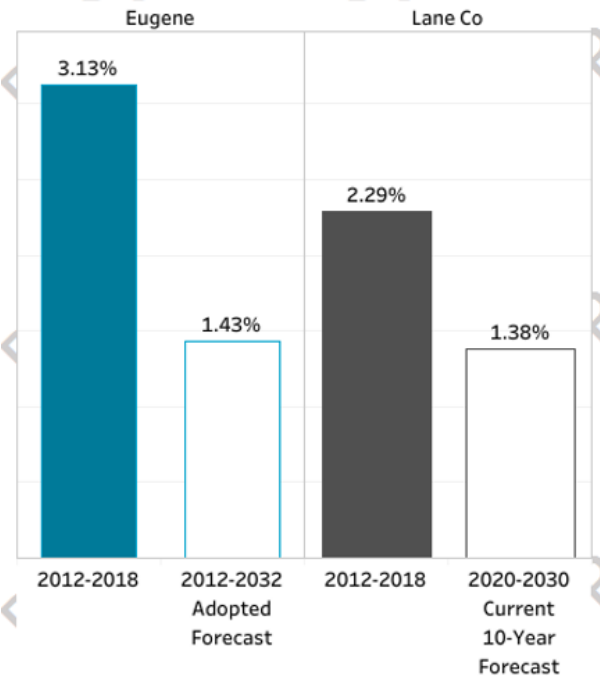
There is more recent available data for Lane County, which is for 2020. Although the number of Lane County jobs dropped in 2020 due to the COVID-19 Pandemic, the Oregon Office of Economic Analysis

noted that by mid-2021, the state has been recovering much faster than in prior downturns. Lane County regained 51% of the jobs lost in March and April 2020 at the onset of the COVID-19 crisis by June 2021.[30] The OEA projects that once the temporary constraints of the pandemic ease up (mainly the temporary enhanced unemployment insurance), workers will return in greater numbers.[31] However, there are many factors that affect participation rates in the labor force, and the long-term impacts of the pandemic on those participation rates remain to be seen. It appears that while jobs in Eugene were growing faster before the pandemic than the adopted growth rate, the growth rate in Lane County's most recent (2021) 10-year forecast (which was created before the pandemic) was projected to be slower than the current rate but matching the adopted rate of 1.4%. OED anticipates providing an employment growth forecast annually going forward so the next forecast would incorporate trends from the pandemic.

[30]Oregon Employment Department July 20, 2021 press release, https://www.qualityinfo.org/documents/10182/73818/Employment+in+Lane+County?version=1.95

[31]Oregon Office of Economic Analysis, https://oregoneconomicanalysis.com/2021/07/20/labor-supply-optimism/

Average Annual Employment Growth Rate (AAGR)



Sources:

Eugene Forecast Data: City of Eugene Planning and Development Department, Eugene Land Model for total employment

Eugene Historical Data: Prepared by Lane Council of Governments from State of Oregon Employment Department, Employment and Wages by Industry (QCEW) of workers covered by unemployment insurance

Lane Co Data: State of Oregon Employment Department, Employment and Wages by Industry (QCEW) of workers covered by unemployment insurance
Lane Co Forecast Data: State of Oregon Employment Department, Lane Industry Employment Projections for total employment

Employment by Category

Overview: Employment by Category is the number of covered jobs grouped into the four generalized employment categories used during the UGB analysis; commercial non-retail, commercial retail, industrial, and public (government).

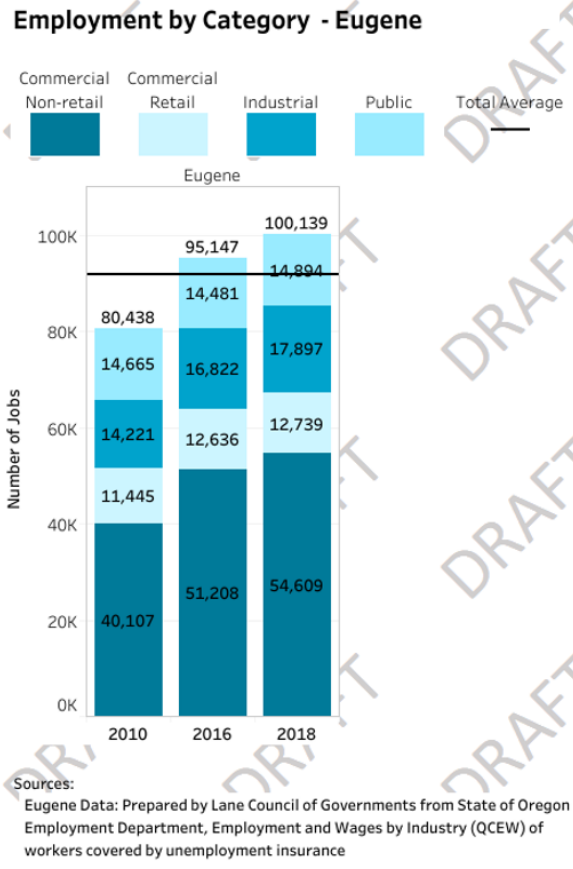
Data Source: Same as *Average Annual Employment Growth Rate*.

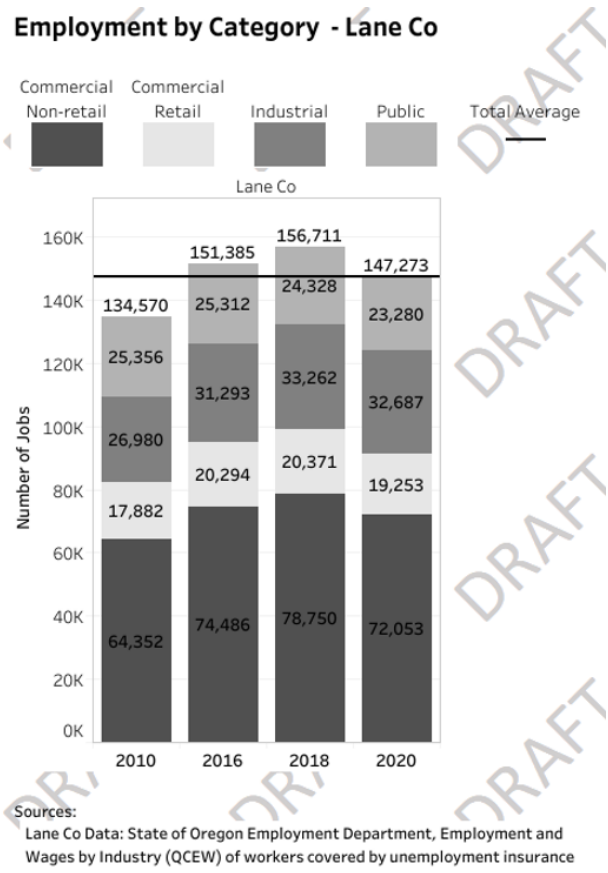
Relationship to UGB land supply and demand model: Covered jobs is the basis for the employment forecast and therefore is a **key direct input** into a land supply and demand model and gives context about jobs in the community and Eugene as an economic draw for the region. The land model uses an estimate of projected job growth as an input and the growth projections are by employment category.

Takeaway: The most recent data readily available for Eugene is 2018, so 2018 is used for comparing Eugene and Lane County. **2018 estimates show that both Eugene and Lane County have experienced an overall increase in jobs since 2010, and job growth in all categories**. As shown in more detail in *Employment by Sector*, jobs in the commercial non-retail category had the highest change between 2010 and 2018 with an increase of about 36% in Eugene and tied for the highest change with a 22% increase for Lane County:

- Commercial non-retail: added 14,502 jobs, up 36%
- Commercial retail: added 1,294 jobs, up 11%
- Industrial: added 3,676 jobs, up 26%
- Public/Government: added 229 jobs, up 2%

The most recent available data is for Lane County, 2020. Lane County covered jobs increased from 2010 up until 2020 when they decreased to 147,273, from 156,711 in 2018.





Employment by Sector

Overview: Employment by Sector is a more detailed look at the number of *covered* jobs in a jurisdiction broken out by employment sector using the 2-digit NAICs Codes (North American Industry

Classification System) used by the Oregon Employment Department. See comments above regarding covered versus total employment.

Data Source: Same as *Average Annual Employment Growth Rate*.

Relationship to UGB land supply and demand model: Same as *Average Annual Employment Growth Rate*.

Takeaway: The most recent available data is for Lane County, 2020, however the most recent data for Eugene is 2018 so 2018 will be used for comparing Eugene and Lane County.

The table below shows the diversity of Eugene's economy. **The circled rows make up the top six employment sectors, that is, those with the most covered jobs**. The largest sectors are the same for both Eugene and Lane County. In general, the percent of jobs by industry is very similar in Eugene and Lane County which is not surprising since the majority of the County's jobs are in Eugene (64%). The portion of Professional, Scientific, and Technical Services and Heath Care and Social Assistance jobs are higher in Eugene than Lane County; whereas Construction and Natural Resources and Mining are higher in Lane County (although the latter is a small amount in both jurisdictions).

The sectors with the most changes in covered employment between 2010 and 2018 are highlighted below. The Health Care and Social Assistance sector had the biggest increase in jobs, growing by more than 7,500 jobs (68%)[32] in Eugene and were lost from somewhere else in the County. The Accommodation and Food Service grew by about 2,400 jobs (33%) in Eugene and 3,500 jobs in Lane County. Both Administrative and Waste Services and the Manufacturing sectors added more than 1,000 jobs in Eugene and more than 2,000 jobs countywide.

Retail trade added more than 1,000 jobs in Eugene and more than 2,000 jobs in Lane County. National trends in the Retail Trade sector will have the biggest impact on land use planning, as consumers shift their buying away from bricks-and-mortar stores to on-line venues.

[32] Healthcare practitioners and healthcare-support workers have higher wages in Oregon than in the nation, and this difference is more pronounced in Lane County (of which Eugene is Lane County's major job center) because Lane County has lower wages in general than Oregon.
https://www.qualityinfo.org/documents/10182/96541/Lane+County+Economic+Indicators?version=1.84, and email correspondence, Oregon Employment Department, August 21, 2021.

Employment by Sector - Eugene

Covered Jobs Category/Sector (2 digit NAICS* Code)	Eugene Adopted Percent of 2012-2032 jobs	2010	2018	Percent of 2018 jobs	2010-2018 Jobs change	2010-2018 Percent change	2010-2018 AARG
Commercial Non-retail	**55%**	**40,107**	**54,609**	**55%**	**14,502**	**36%**	**3.9%**
Accommodation And Food Services (11,21)		7,362	9,770	10%	2,408	33%	3.6%
Administrative And Waste Services (56)		4,361	5,722	6%	1,361	31%	3.5%
Arts, Entertainment, And Recreation (71)		1,094	1,482	1%	388	35%	3.9%
Finance And Insurance (52)		2,610	2,678	3%	68	3%	0.3%
Health Care And Social Assistance (62)		11,114	18,693	19%	7,579	68%	6.7%
Information (51)		1,633	1,437	1%	-196	-12%	-1.6%
Management Of Companies And Enterprises (55)		1,342	2,474	2%	1,132	84%	7.9%
Other Services (Except Public Administration) (81)		3,640	4,452	4%	812	22%	2.5%
Private Educational Services (61)		1,191	1,462	1%	271	23%	2.6%
Professional, Scientific, And Technical Services (54)		4,419	4,734	5%	315	7%	0.9%
Real Estate And Rental And Leasing (53)		1,341	1,705	2%	364	27%	3.0%
Commercial Retail	**12%**	**11,445**	**12,739**	**13%**	**1,294**	**11%**	**1.3%**
Retail Trade (44, 45)		11,445	12,739	13%	1,294	11%	1.3%
Industrial	**19%**	**14,221**	**17,897**	**18%**	**3,676**	**26%**	**2.9%**
Construction (23)		2,191	3,334	3%	1,143	52%	5.4%
Manufacturing (31, 32, 33)		7,338	8,647	9%	1,309	18%	2.1%
Natural Resources And Mining (11, 21)		197	307	0%	110	56%	5.7%
Transportation, Warehousing And Utilities (22, 48, 49)		996	1,438	1%	442	44%	4.7%
Wholesale Trade (42)		3,499	4,171	4%	672	19%	2.2%
Public	**14%**	**14,665**	**14,894**	**15%**	**229**	**2%**	**0.2%**
Government (92)		14,665	14,894	15%	229	2%	0.2%
Total		**80,438**	**100,139**	**100%**	**19,701**	**24%**	**2.8%**

*North American Industry Classification System

While Eugene 2020 data is not available yet, the Lane County 2020 data in the chart below provides some glimpse into recent impacts at the county level. There were losses in almost every sector due to the pandemic; the Accommodation and Food Services and the Arts, Entertainment and Recreation sectors were hit hard, consistent with national trends. As previously noted, OED's July 2021 press release states that Lane County has regained 51% of the jobs lost in March and April 2020 at the onset of the COVID-19 crisis and that when comparing June 2021 to June 2020, all major industry sectors are up over the previous year.

Employment by Sector - Lane County

Covered Jobs	Lane County					
				2018-2020		
Category/Sector (2 digit NAICS* Code)	2018	2020	Percent of 2020 jobs	Jobs change	Percent change	AARG
Commercial Non-retail	**78,750**	**72,053**	**49%**	**-6,697**	**-9%**	**-4.3%**
Accommodation And Food Services (11,21)	15,475	12,325	8%	-3,150	-20%	-10.8%
Administrative And Waste Services (56)	9,146	7,984	5%	-1,162	-13%	-6.6%
Arts, Entertainment, And Recreation (71)	2,083	1,470	1%	-613	-29%	-16.0%
Finance And Insurance (52)	3,620	3,816	3%	196	5%	2.7%
Health Care And Social Assistance (62)	25,878	26,323	18%	445	2%	0.9%
Information (51)	2,411	1,974	1%	-437	-18%	-9.5%
Management Of Companies And Enterprises (55)	3,323	3,510	2%	187	6%	2.8%
Other Services (Except Public Administration) (81)	6,630	4,951	3%	-1,679	-25%	-13.6%
Private Educational Services (61)	1,885	1,621	1%	-264	-14%	-7.3%
Professional, Scientific, And Technical Services (54)	5,719	5,662	4%	-57	-1%	-0.5%
Real Estate And Rental And Leasing (53)	2,580	2,417	2%	-163	-6%	-3.2%
Commercial Retail	**20,371**	**19,253**	**13%**	**-1,118**	**-5%**	**-2.8%**
Retail Trade (44, 45)	20,371	19,253	13%	-1,118	-5%	-2.8%
Industrial	**33,262**	**32,687**	**22%**	**-575**	**-2%**	**-0.9%**
Construction (23)	7,204	7,323	5%	119	2%	0.8%
Manufacturing (31, 32, 33)	14,195	13,795	9%	-400	-3%	-1.4%
Natural Resources And Mining (11, 21)	2,361	2,452	2%	91	4%	1.9%
Transportation, Warehousing And Utilities (22, 48, 49)	3,276	3,182	2%	-94	-3%	-1.4%
Wholesale Trade (42)	6,226	5,935	4%	-291	-5%	-2.4%
Public	**24,328**	**23,280**	**16%**	**-1,048**	**-4%**	**-2.2%**
Government (92)	24,328	23,280	16%	-1,048	-4%	-2.2%
Total	**156,711**	**147,273**	**100%**	**-9,438**	**-6%**	**-3.1%**

*North American Industry Classification System

Sources:

Eugene Data: Prepared by Lane Council of Governments from State of Oregon Employment Department, Employment and Wages by Industry (QCEW) of workers covered by unemployment insurance

Lane Co Data: State of Oregon Employment Department, Employment and Wages by Industry (QCEW) of workers covered by unemployment insurance

Unemployment Rate

Overview: The unemployment rate is the share of the labor force that is in the job market but is jobless (and actively looking for a job), expressed as a percentage. The unemployment rate shown below is *not* seasonally adjusted, which allows comparison across geographies (a seasonally adjusted rate for Eugene is not available). Seasonally adjusted rates are only available at the national and state levels, not locally for Eugene, and while seasonally adjusted data flattens the high/low summer job spikes in monthly data, it is more important to have a Eugene-specific unemployment rate than it is to have seasonally adjusted rates for a larger geographic area that Eugene is a portion of.

Data Source: The U.S. Bureau of Labor and Statistics, Local Area Unemployment Statistics (LAUS). This chart utilizes the monthly reported unemployment rate. The rate is regardless of whether the

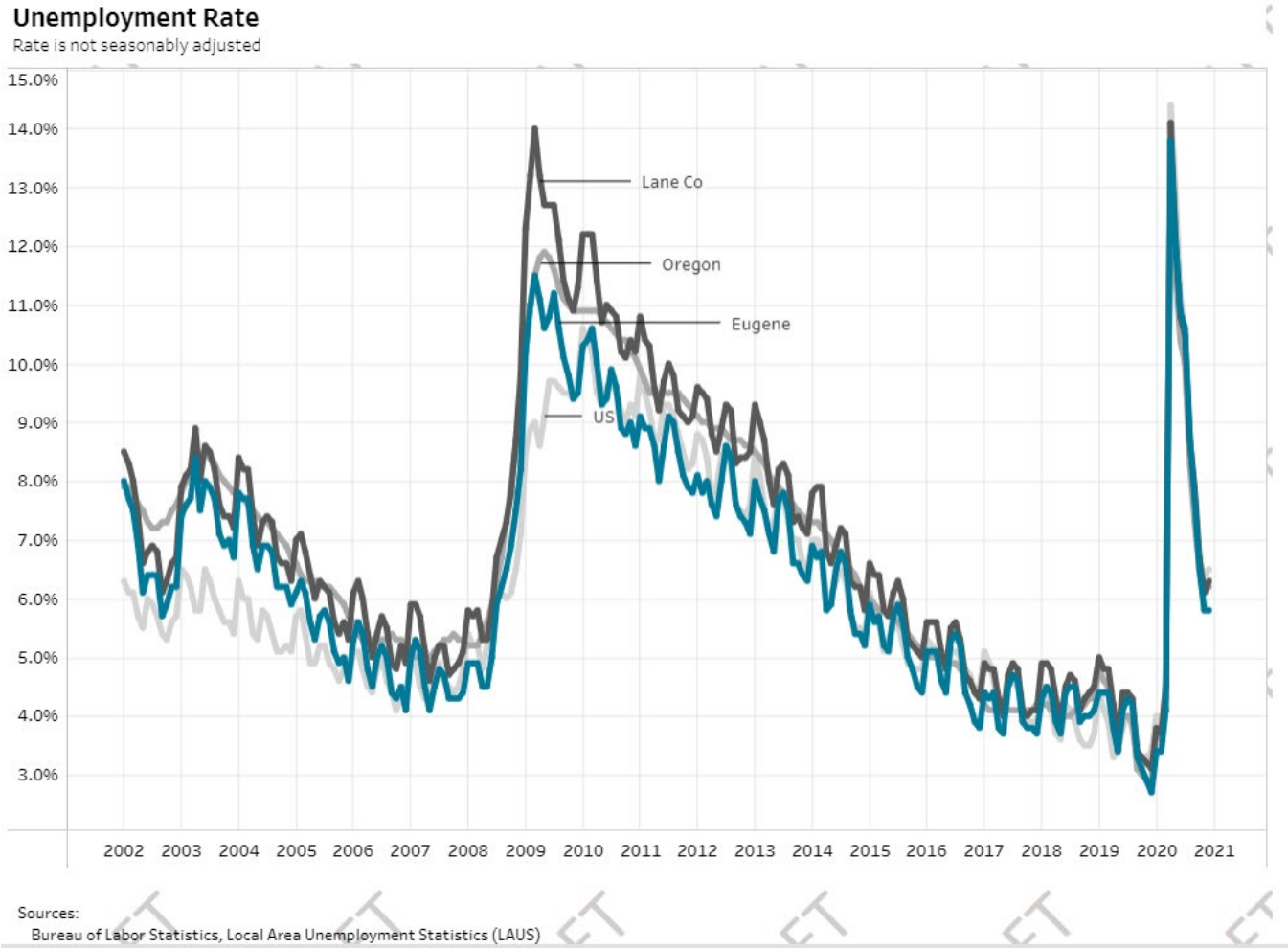
respondent is collecting unemployment insurance or not, and includes employees not covered by unemployment insurance, such as individuals who may be new entrants to the labor force.

Relationship to UGB land supply and demand model: This is *not* a direct input into a land supply and demand model but gives context about jobs in the community and Eugene as an economic draw for the region.

Takeaway: Eugene's unemployment rate fluctuation *pattern* (ups and downs) generally tracks closer to Lane County's; however, the actual unemployment rate *number* is generally closer to the national rate, **Eugene's and the national rate are typically lower than the County's**. Eugene's unemployment rate peaked around 2009/2010 and has decreased since then. Before the 2020 pandemic, it was even lower than it was during the economic boom which was at its height around 2006. Over the monitoring period, **Eugene's unemployment rate has steadily declined, from 9.1% in January 2011 to 4.1% in December 2018**. The chart below illustrates the steep rise and fall of the unemployment rate in 2020-mid 2021 for all geographies shown. Although unemployment in Eugene is still above pre-COVID-19 levels it is generally trending down. The Oregon Office of Economic Analysis noted in July 2021 that the number of firms looking to fill jobs is at record levels.[33]

Unemployment rates change with the overall state of the economy. This is not something that the City can directly affect but the City can diversify its economy so that decreases in one or two sectors have less of an impact on jobs in Eugene.

[33] https://oregoneconomicanalysis.com/2021/07/20/labor-supply-optimism/



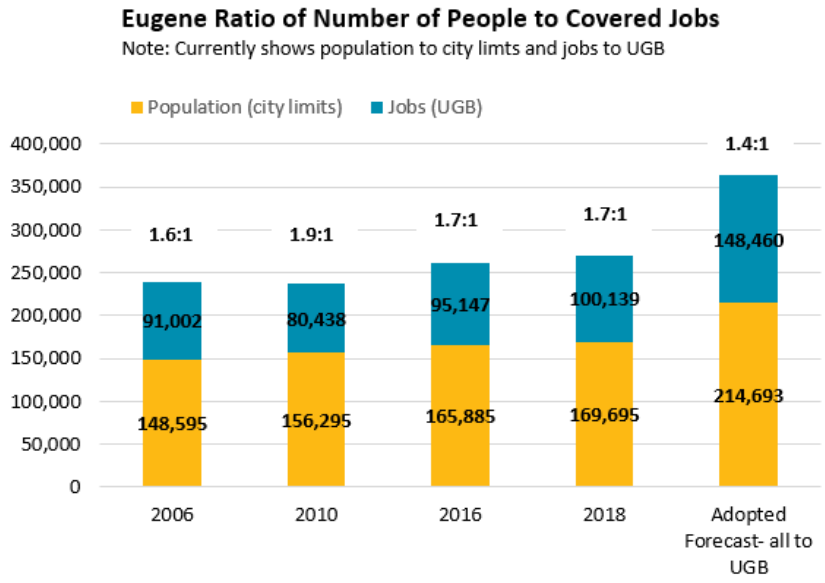
Comparing Population to Jobs

Overview: The ratio of the number of people in Eugene compared to the number of covered jobs in Eugene shows whether job creation is keeping pace with population over time. A "bedroom" city typically has a high population to jobs ratio (like 4.0 or 6.0 people to each job, or 4:1) and a bigger employment center (like Eugene) has a lower population to jobs ratio (like 1.5 to 2.0 people to each job, or 1.5:1).

Data Source: The chart currently uses the ratio of number of people in the city limits to the number of covered jobs within the UGB. When new Eugene jobs data is available again, this will be revised so that both population and jobs is to the UGB. Portland State University's Population Research Center provides the population within the city limits annually and the population within the UGB is part of their population forecasts which are provided to cities and counties on a rotating schedule every four years (same source as *Average Annual Population Growth Rate*). Jobs within Eugene's UGB is provided by Lane Council of Governments using OED's QCEW data, same as for the *Annual Average Employment Growth Rate* chart.

Relationship to UGB land supply and demand model: The ratio is *not* a direct input into the land supply and demand model but provides context regarding whether the number of jobs is keeping pace with the number of people.

Takeaway: The current chart shows that in 2006, before the 2007-2009 recession, Eugene had 1.6 people for each job in the UGB for every person in the city limits (or put another way more jobs in comparison to the population). After the 2007-2009 recession, during the monitoring period (but before the COVID-19 pandemic) Eugene employment had rebounded to about the same 2006 ratio, to 1.7 people for each job in 2018. This means that **as of 2018 there were more people per job than the Adopted Forecast** which assumed a ratio of 1.4 people for each job.



Sources:

Historical Population: Portland State University, College of Urban & Public Affairs, Population Research Center

Historical Jobs: Prepared by Lane Council of Governments from State of Oregon Employment Department, Employment and Wages by Industry (QCEW) of workers covered by unemployment insurance

Forecast Population/Jobs: City of Eugene Planning and Development Division, Land Sufficiency Model

Eugene Population and Jobs Growth Rates

Another way to look at how jobs compare to the population is to compare the growth rates. The comparison is not exactly equal given that the data is available for different periods, but it provides some context; generally, **both population and job growth during the monitoring period have been faster than the adopted 20-year growth rates, and both are projected to have lower growth rates in the future (although the most recent Lane County jobs growth rate forecast matches Eugene's adopted growth rate)**. This is consistent with the population to jobs ratio analysis above.

Eugene Population and Jobs Growth Rates

	Actual: Population 2012-2021 Jobs 2012-2018	Adopted: UGB Forecasts 2012-2032	Most recent forecasts: Population 2020-2040 Jobs 2020-2030
Population Growth Rate (UGB)	1.2%	0.9%	0.9%
Jobs Growth Rate (UGB)	3.13%	1.43%	1.4% (Lane Co)

Jobs - How is Eugene's income, education and job commutes?

Average Annual Wage or Pay of Jobs

Overview: Average annual pay (or average wage) per employee, meaning average annual pay of the *jobs* in the jurisdiction not of the *residents* in the jurisdiction. This is provided for Lane County, Oregon and the U.S. Average, annual pay is not readily available for Eugene for all years (for Eugene income data, see *Median Household Income* chart).

Data Source: The State of Oregon Employment Department through the Quarterly Census Employment Wages data for insurance covered jobs only. Uncovered jobs such as self-employed or railroad workers are not included. The pay has been adjusted for inflation to the most recent year noted.

Relationship to UGB land supply and demand model: This is *not* a direct input into a land supply and demand model but gives context for the types of jobs and incomes in the community, the types of jobs to plan for, and for Eugene as an economic draw for the region.

Takeaway: Average annual pay for people who work in Lane County has risen 19.4% over the monitoring period from $41,456 in 2012 (adjusted to 2020 dollars) to $49,503 in 2020, whereas Oregon had a 22.9% increase over the same period.[34] The increase in wages since 2012 correlates with the decrease in poverty and cost-burdened households, though generally low- and moderate-income households often experience wage growth at a much slower rate than others. Although average annual pay for Eugene is not readily available for all years in the monitoring period, analysis of the OED QCEW data shows that the **annual pay for Eugene jobs rose 6% between 2016 and 2018 (from $41,411 to $43,968, not adjusted for inflation)**.[35]

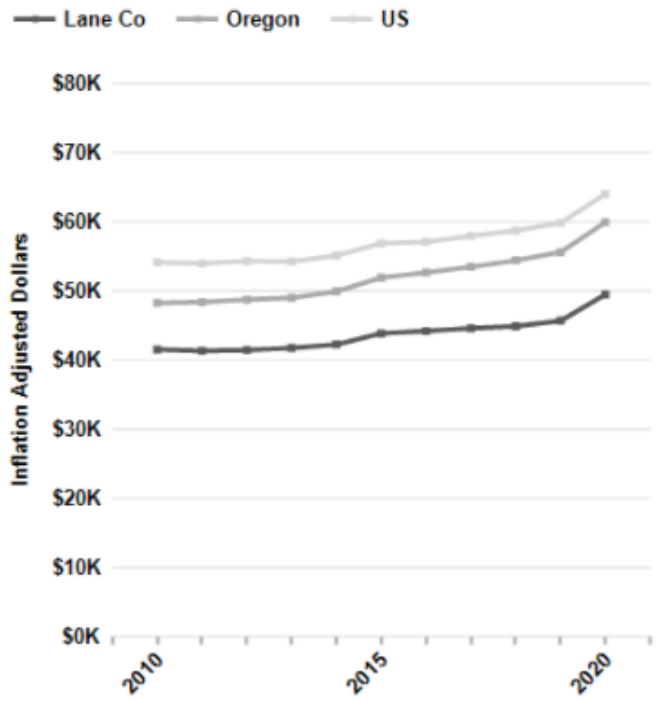
[34] Oregon's statewide minimum wage was $8.80 in 2012 compared to $12.00 in 2020, an increase of 36.4% over the monitoring period, which further corroborates the significant increase of average annual pay between 2012-2020. See Department of Labor minimum wage changes by state: https://www.dol.gov/agencies/whd/state/minimum-wage/history.

[35] Eugene's average wage data is an approximation of payroll data in comparison to Lane County's wage data which is known. The QCEW covered jobs data for Lane County is reported to OED, then LCOG geographically re-distributes those jobs in Eugene's UGB using site address and disaggregating jobs from firms that report all their jobs as at a central location which are actually at various locations. Because disaggregated data is used for Eugene jobs data, it was also used to derive Eugene's wage data rather than calculating it from the raw data where some jobs could be missed, however for firms that had to be disaggregated this process may over allocate higher paid jobs to one jurisdiction or another.

The most recent data for Lane County is an OED estimate of 2021 employment and wage averages based on just the first quarter of 2020 (these most recent estimates are not reflected in the chart below).[36] However, that analysis indicates that the average wage in Lane County has risen since 2019 but is still lower than the statewide average; Lane County's 2021 annual average was $52,528 compared with the statewide annual average of $58,443. OED says that some of the difference may be due to the presence of the University of Oregon because college students may take a lower wage for a job and graduates create a large supply of entry-level applicants in the professional occupations. OED notes that not all occupations in Lane County pay lower wages than the statewide figure, in fact some pay higher wages. Additionally, OED notes that the 2021 annual average indicates the highest paid occupations in Lane County are health care, management, computer and mathematical, architectural and engineering, and legal occupations, whereas many of the largest occupations are relatively low paying jobs in the services and retail sales.

Average Annual Pay of Jobs in Jurisdiction

Income is adjusted for inflation to most recent displayed year's dollars.



Source: State of Oregon Employment Department, Employment and Wages by Industry, https://www.qualityinfo.org/ed-ewind

[36] https://www.qualityinfo.org/-/lane-county-2021-occupational-wages?inheritRedirect=true&redirect=%2Flane

Median Household Income

For information on this topic, see Appendix C: General or Overarching Data, section Household Assumptions, *Median Household Income* which also includes median family income data.

Household Income Distribution

Overview: The distribution of household income range.

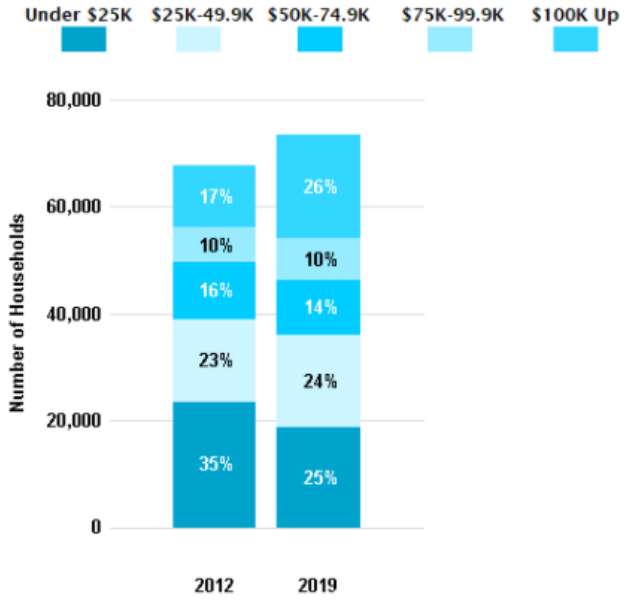
Data Source: The ACS provides the most recent data based on a sample of Eugene households. This data is not available from the Decennial Census. The income reported in the Census has been adjusted for inflation to the most recent year noted.

Relationship to UGB land supply and demand model: This is *not* a direct input into a land supply and demand model but gives context for the types of jobs and income in the community.

Takeaway: In 2019, about half of Eugene households made less than $50,000, which is an improvement from 2012 when about 58% of Eugene households made less than $50,000. **Lower-income households making less than $25,000 a year made up 25% of households in 2019 compared to 35% in 2012 and higher income households making more than $100,000 increased from 17% in 2012 to 26% in 2019**. In comparing Eugene to Oregon, **Eugene consistently has a higher proportion of household incomes of less than $25,000 than Oregon as a whole**. While lower-income households (less than $25,000) appear to have decreased, housing costs have generally increased over the same period.

Household Income Distribution - Eugene

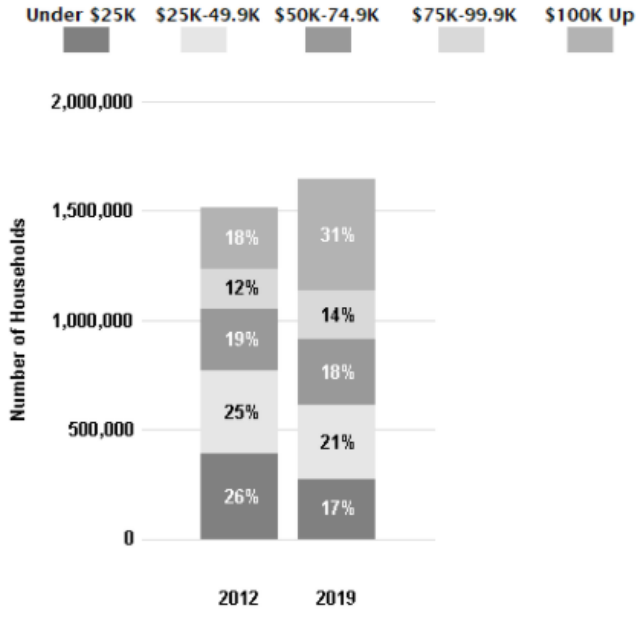
Income is for year prior to census year noted, and is adjusted for inflation to most recent displayed year's dollars.



Source: U.S. Census Bureau American Community Survey 1 Year Estimates, Table B19001

Household Income Distribution - Oregon

Income is for year prior to census year noted, and is adjusted for inflation to most recent displayed year's dollars.



Source: U.S. Census Bureau American Community Survey 1 Year Estimates, Table B19001

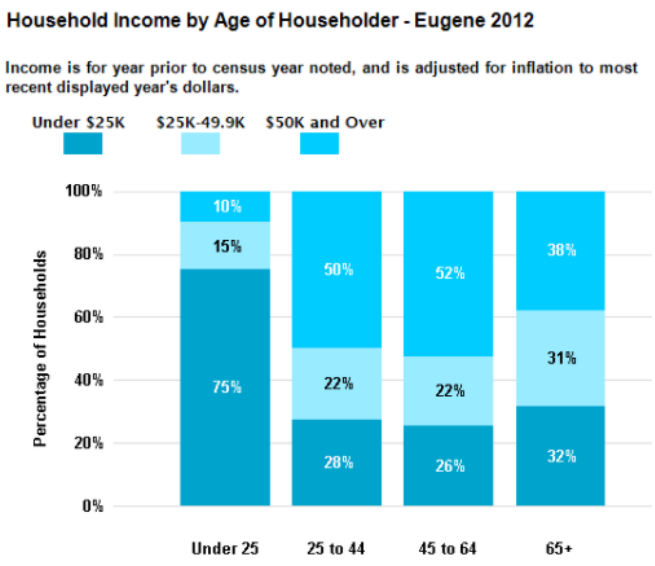
Household Income by Age of Householder

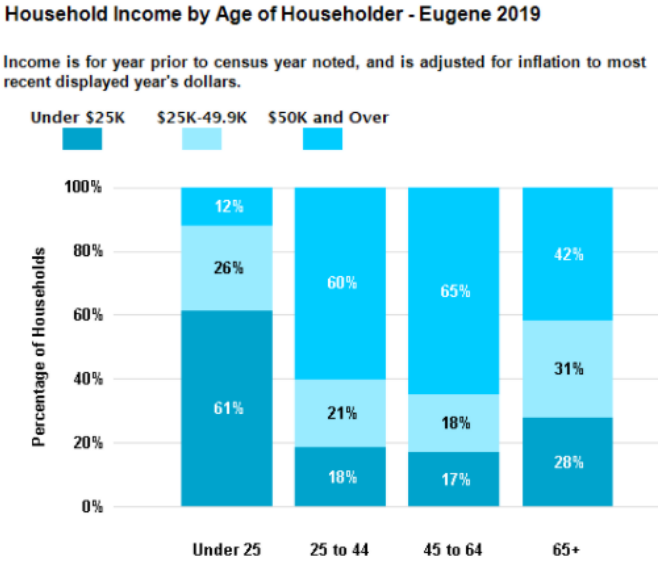
Overview: Household income by the age of the householder, showing at what age group householders typically make the most and least money.

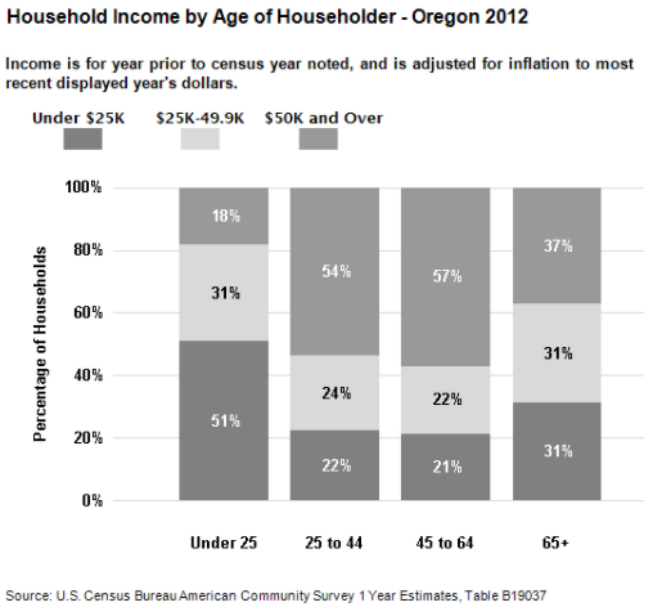
Data Source: The ACS provides the most recent data based on a sample of Eugene households. This is not available from the Decennial Census. The income reported in the Census has been adjusted for inflation to the most recent year noted.

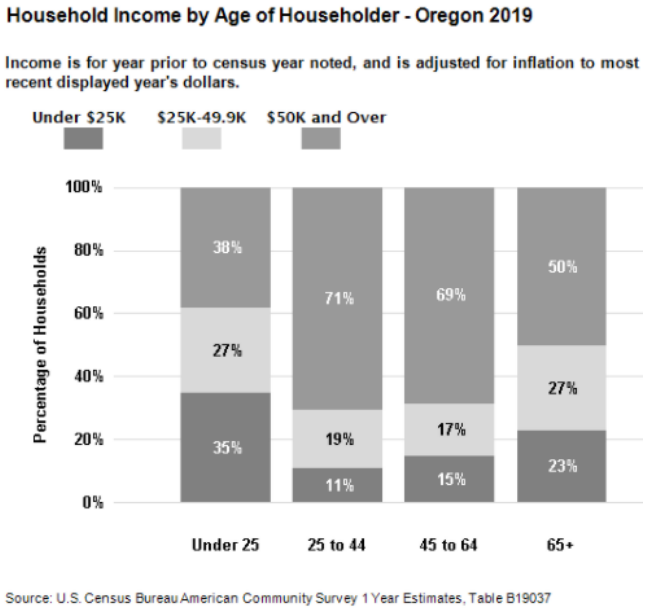
Relationship to UGB land supply and demand model: This is *not* a direct input into a land supply and demand model but gives context for the types of jobs and income in the community.

Takeaway: Eugene experiences the same general pattern as the nation, that **income rises with age until about 65 years**, and that pattern is consistent over the monitoring years. Comparing Eugene to Oregon is more helpful than Lane County because Eugene makes up a large portion of Lane County. However, a similar pattern is experienced in Oregon as well.









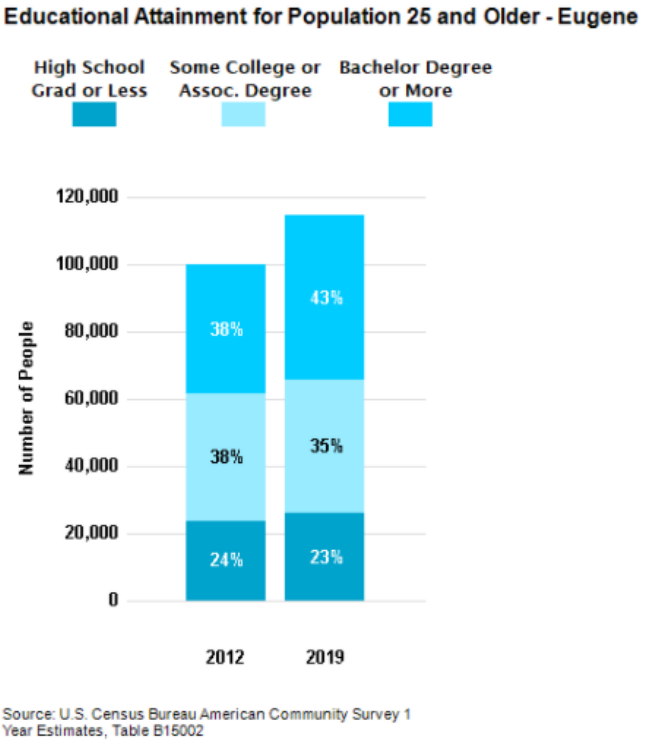
Educational Attainment for Population 25 and Older

Overview: The share of population by the level of education completed contributes to understanding the labor force.

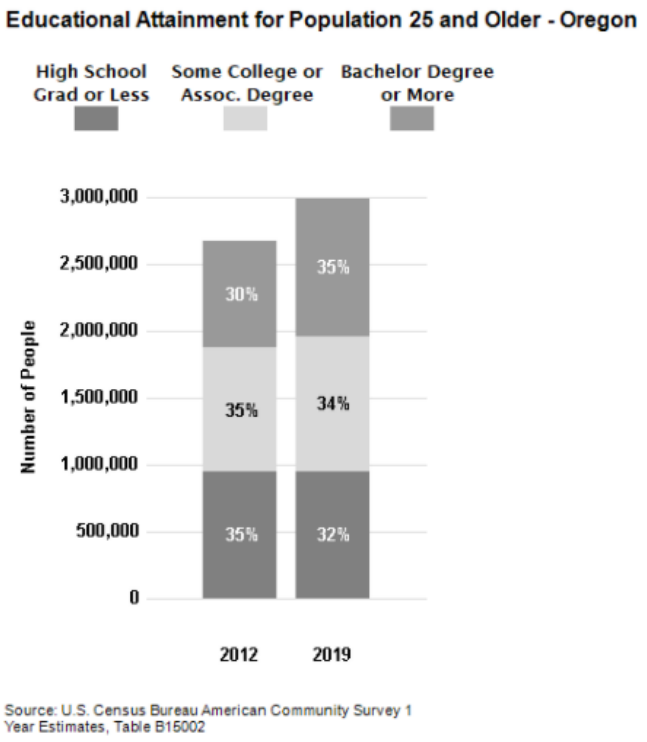
Data Source: The ACS provides the most recent data based on a sample of Eugene households. This data is not available from the Decennial Census.

Relationship to UGB land supply and demand model: This is *not* a direct input into a land supply and demand model but gives context for the types of jobs and workforce in the community.

Takeaway**: Eugene continues to have a higher proportion of residents with a bachelor's degree or more (43% in 2019) than Oregon as a whole (35% in 2019)**, most likely due to the presence of the University of Oregon. Comparing Eugene to Oregon is more helpful than comparing Eugene to Lane County since Eugene makes up a large portion of Lane County.



Source: U.S. Census Bureau American Community Survey 1 Year Estimates, Table B15002



Source: U.S. Census Bureau American Community Survey 1 Year Estimates, Table B15002

Commuting Patterns

Overview: This chart shows commuting patterns for both where people that live in Eugene work as well as for where people that work in Eugene live. Longer commutes between where residents work and live can add costs and decrease overall affordability of where someone lives.

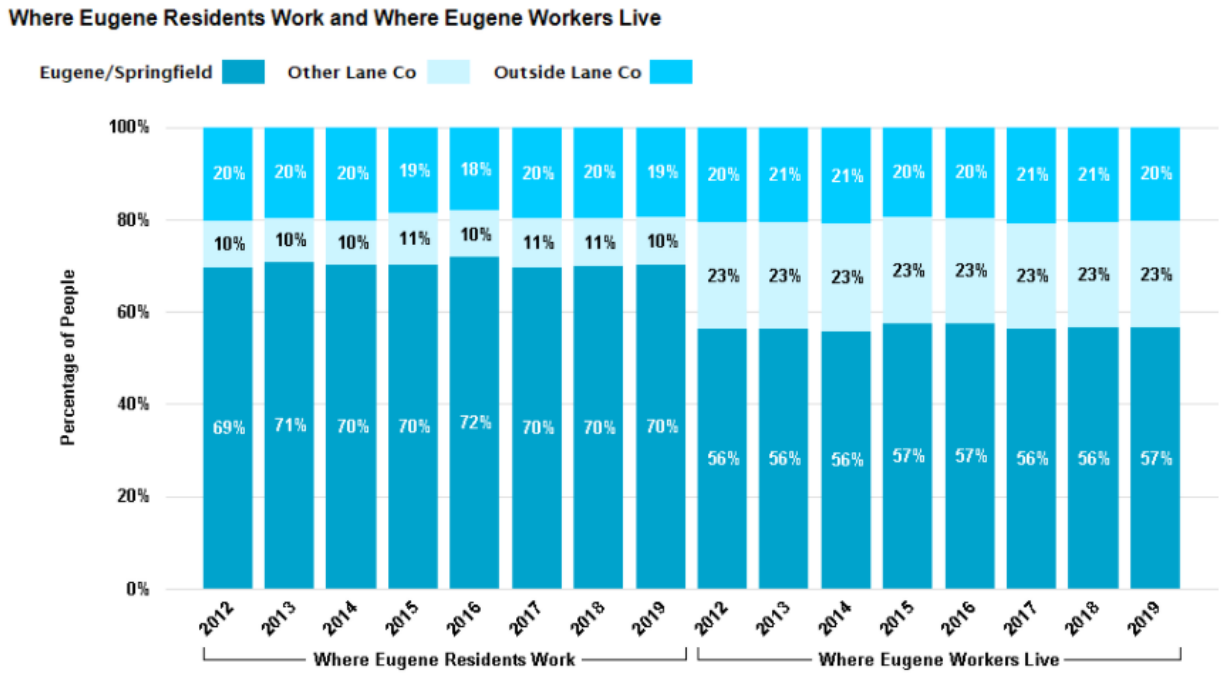
Data Source: The ACS provides recent data based on a sample of Eugene households.

Relationship to UGB land supply and demand model: This is *not* a direct input into a land supply and demand model but gives context about jobs in the community and Eugene as an economic draw for the region.

Takeaway: Commuting patterns are ultimately market-based and there is not a lot a city can do to significantly influence where people work. Overall takeaway is that **almost three-quarters of the people that live in Eugene also work in Eugene/Springfield**. In contrast, just over 40% of the people that work in Eugene live in other locations in Lane County or even further away. These percentages have stayed consistent throughout the 2012-2019 monitoring period.

The COVID-19 pandemic, in which many office workers have worked from home for some period, will likely continue to influence where residents work and workers live nationwide, as employers and employees explore flexible work-from-home scenarios that more easily allow people to work and live in different places. The Oregon Office of Economic Analysis expects that there will be fundamental gains in the number of people working from home as it becomes a larger part of standard business

practices, but the extent of and the impacts this may have on communities remains an open question.[37]



Source: U.S. Census Bureau Center for Economic Studies, https://onthemap.ces.census.gov/tot/

Commuting Time to Work

Overview: The share of the population by length of commute to work.

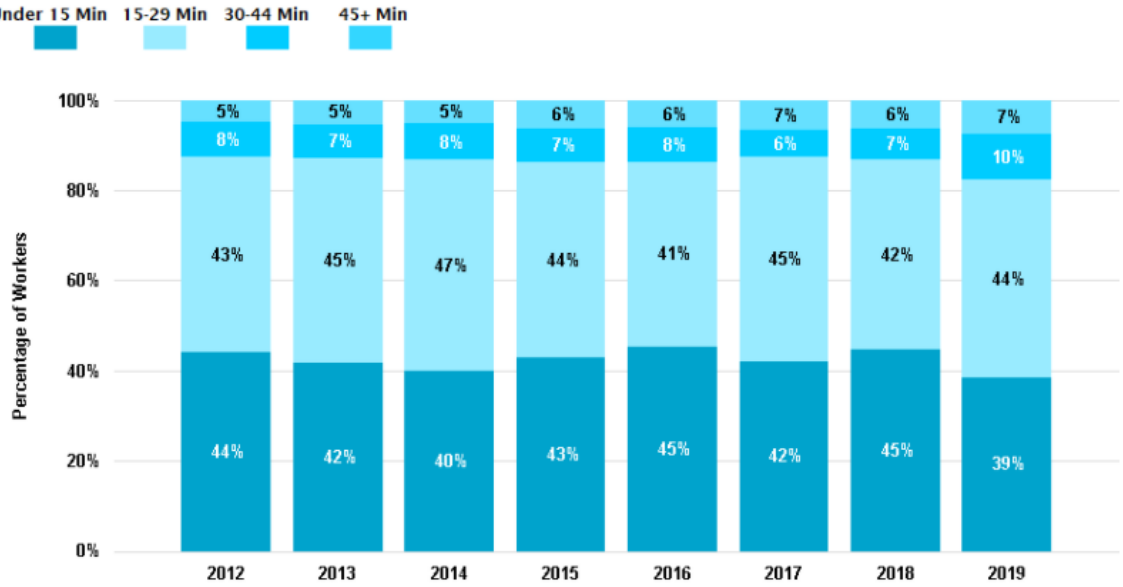
Data Source: The ACS provides recent data based on a sample of Eugene households.

Relationship to UGB land supply and demand model: This is *not* a direct input into a land supply and demand model but gives context about jobs in the community and Eugene as an economic draw for the region.

Takeaway: Commuting patterns are ultimately market-based and there is not a lot a city can do to significantly influence where people work. Overall takeaway is that **more than 80% of Eugene residents spend less than half an hour commuting to work**. This is supported by the chart *Where Eugene Residents Work and Where Eugene Workers Live*, which shows that 70% of Eugene residents also work in Eugene/Springfield. As noted in that chart takeaway, the effects of the COVID-19 pandemic will likely continue to influence where people live and work. Commute times in particular will be impacted by employees who have and may continue to work from home.

[37] Oregon Office of Economic Analysis, Just How Much is Working from Home on the Rise, https://oregoneconomicanalysis.com/2021/12/16/just-how-much-is-working-from-home-on-the-rise/

Commuting Time to Work in Minutes for Residents Age 16 and Older - Eugene



Source: U.S. Census Bureau American Community Survey 1 Year Estimates, Table B08303

Development of The Nel (Permanent Supportive Housing). Photo by City of Eugene staff.

D. Appendix: Housing Development Data – Details

Housing Development and Land

Land in the UGB is designated or planned for different types of development at different levels of intensity. Land residentially designated as Low, Medium or High Density Residential is where most of Eugene's residential development and building permits are anticipated to occur, although some housing also happens on Commercial land (like downtown) and to a much smaller degree, on Industrial designated land as accessory to a commercial or industrial use or on Government & Education/University Research land for affordable housing developments.[38]

Housing of all different types is planned for and allowed in residential and commercial designations, subject to certain standards. Those standards influence and to some degree limit the type and amount of housing that develops in each plan designation. Historically, some housing types have been more prevalent in certain plan designations than others, such as single-family detached occurring more often on Low Density Residential land than large apartment buildings. The following analysis categorizes development by housing types and the BLI plan designation of the land they occur on.

[38] For lots that are split by more than one plan designation, the dwellings and housing development impacts are roughly attributed to each applicable plan designations to a reasonable degree.

The housing development discussed here, particularly related to density and impacts to the BLI, attempts to account for all development needed for the housing (housing buildings, parking, open space and landscaping, community buildings, storage) whereas non-residential uses in a mixed use building are not counted as part of the residential development (e.g., retail on the bottom floor of an apartment building is accounted for under employment building permits).

Issued Single-family and Multi-family Dwellings

Building permit data during the monitoring period and going forward is being collected differently than the building permit data that was used during the previous UGB analysis. Going forward, the new data collection system will collect data either automatically (for simple permits) or as the permit is reviewed (for complex permits) rather than through the manual look-back process used during the UGB analysis. Building permit data reported here is for building permits that have been issued (not permits that have only been submitted and are in review), regardless of if they have received a certificate of occupancy or not. At this time, the data for this report is a combination of manual review and automated data.[39]

The monitoring period data represents the number of net new dwellings (new minus demolished dwellings) to the greatest degree possible, whereas the historical data (2001-2012) used for the adopted 2012-2032 housing needs analysis and UGB only had data on new dwellings and did not necessarily capture demolitions or other replacements of dwellings. Also, unless otherwise noted, dwellings referred to in these charts do not include dwellings in group quarters (nursing homes, dormitories, jails).

For most data in this report, the starting year of the monitoring period is 2012. For residential permit data, it is more complicated. The adopted buildable lands inventory model was run in August of 2012, and then was updated in May 2013 to reflect new development that had occurred between the first model run and May 2013. For monitoring purposes, a copy of the BLI was created that rolled back those updates so that the BLI monitoring copy reflected development permits that had been issued as of January 2013, and then generally any development going forward would be counted towards meeting the forecast housing need in monitoring. Two exceptions; there were some permits for large developments that were submitted at the end of 2012 and issued in 2012 and 2013 which were clearly counted in the UGB analysis towards meeting the housing need and therefore are included in the monitoring results. In comparison there were some permits issued in 2013 that were reflected in the BLI already, so those permits needed to be excluded from monitoring results and not counted towards meeting the forecast need. Therefore, when discussing total numbers of dwellings, the new housing permit data discussed in this report is generally for permits issued from December 4, 2012 through July

[39] As of October 27, 2021, a very small portion of the data is from building permits that have since been cancelled, refunded or expired, for a total of 17 new dwellings, zero new building square feet, and six BLI impact acres. In addition, five permits were pulled out of the reporting charts due to a reporting bug that was subsequently fixed, which given the small number, remain out of this reporting to minimize the number of small revisions to the report; but these permits will be incorporated back in after this 2021 report.

21, 2021 (when this report was first drafted) and generally referred to as "2012-2021." When averages or trends are calculated, only data in whole years is used (2013-2020) to avoid calculating an artificially lower average or trend.

Housing Numbers and Housing Mix

Dwellings Per Year and Dwellings on Average Per Year

Overview: The dwellings on average per year is the net number of new dwellings from issued building permits per year and how many net new dwellings were issued on average during the monitoring period. The average is derived from full year data only (2012 and 2021 are excluded from the calculation).

Data Source: Historical year data is from the City of Eugene's Planning and Development Department building permits issued between 2001-2012 and is not necessarily net new dwellings. Data from the monitoring years, 2012-2021, is from the City of Eugene's Planning and Development Department land use and building permits database and attempts to account for demolitions and replacements of dwellings.

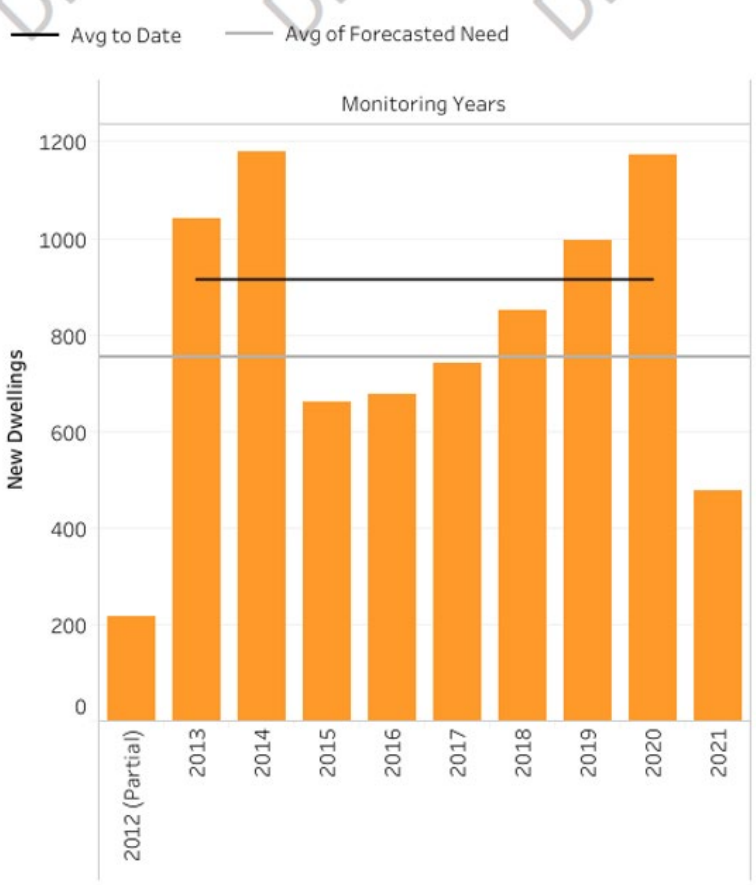
Relationship to UGB land supply and demand model: The total number of new dwellings needed is a **key direct input** into the land supply and demand model and is derived from dividing the population growth projection by an average number of persons per household and then increasing that housing need by a certain percentage to plan for some new housing stock to be vacant (to allow for movement between housing) and to provide housing for group quarters. The total number of dwellings needed to accommodate the projected population growth for 2012-2032 is 15,105 and is an adopted assumption. The average per year needed to meet the 15,105 dwellings is *not* a direct input into the land supply and demand model but is helpful for measuring housing production on an annual basis and whether Eugene is on pace to meet the 20-year housing need.

Takeaway: There were 8,011 net new dwellings permitted, including the partial year data of 2012 and 2021.[40] Although there was a dip in the number of new dwellings issued in 2015, there has been a steady increase since then. **The average dwellings per year between 2013-2020 was 915, surpassing the average forecast need of 755 dwellings per year**. As the number of dwelling permits fluctuates by year, the average dwellings per year may continue to increase or slow down, but for now Eugene is on trend to meet the overall forecast need by 2032. The cyclical nature of housing can be seen when looking at an even longer period of time as shown in the second chart.

[40] There are 19 dwellings that were demolished and replaced with non-residential uses which if accounted for would result in a total of 7,992 net new dwellings over the monitoring period rather than the 8,011 reported here. However, because they were not replaced with new housing, the system did not deduct them from total dwellings shown in the housing mix or housing subcategories charts. Since 19 dwellings is relatively small, 8,011 is referenced throughout the report.

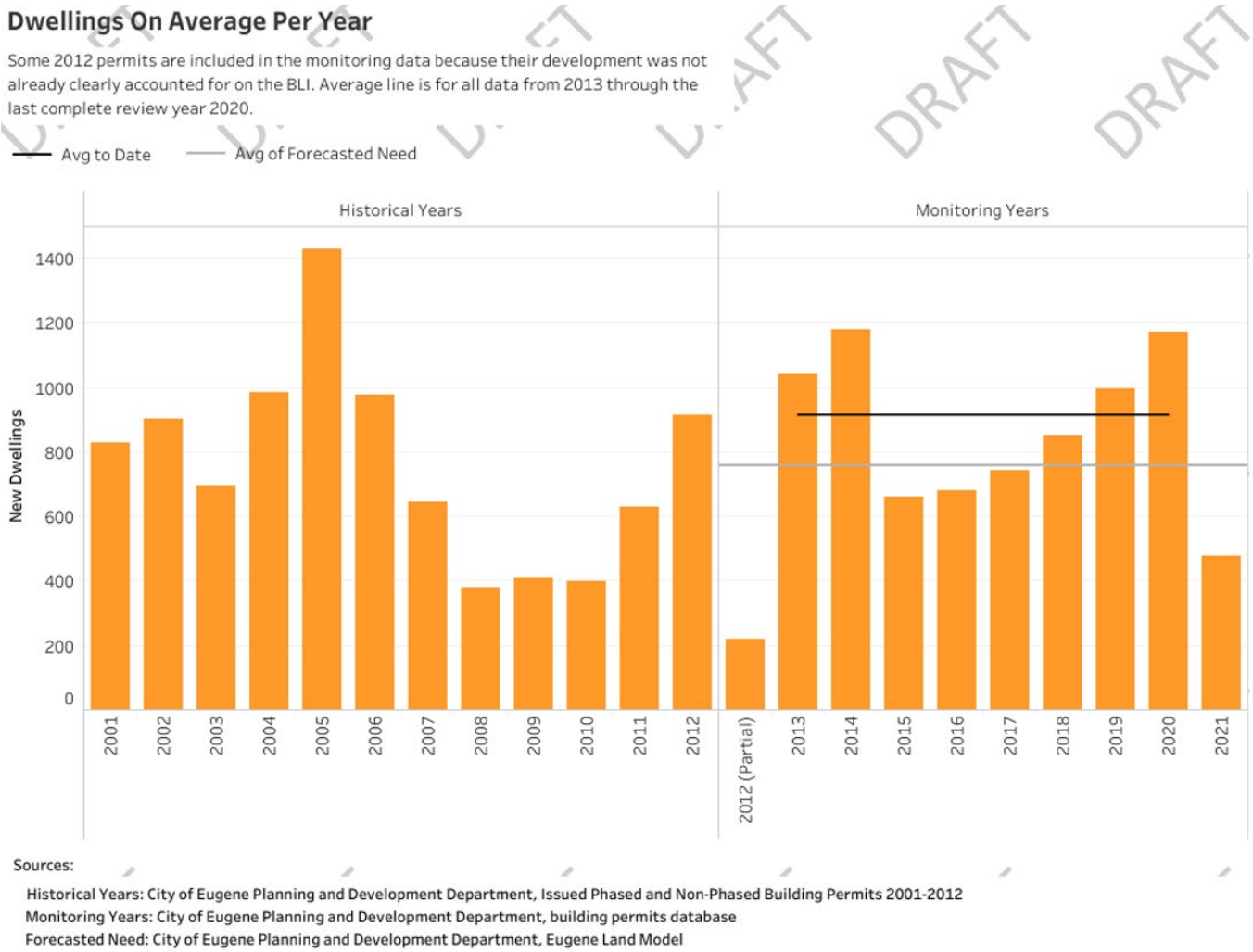
Dwellings On Average Per Year

Some 2012 permits are included in the monitoring data because their development was not already clearly accounted for on the BLI. Average line is for all data from 2013 through the last complete review year 2020.



Sources:

Historical Years: City of Eugene Planning and Development Department, Issued Phased and Non-Phased Building Permits 2001-2012
Monitoring Years: City of Eugene Planning and Development Department, building permits database
Forecasted Need: City of Eugene Planning and Development Department, Eugene Land Model



Housing Production and Population Growth

Overview: Compares new housing production to the amount of population growth over the same period to determine if new housing is keeping up with population growth.

Data Source: Historical population data is provided by the Portland State University's Population Research Center. PSU provides an annual certified population estimate for cities out to the city limits (same as *Average Annual Population Growth Rate*). Building permit data from the monitoring years, 2012-2021, comes from the City of Eugene's Planning and Development Department building permits database (same as *Dwellings on Average Per Year*). The number of residences within the city limits at the beginning of the monitoring period, 2012, provides a baseline to determine the change in housing supply. While data to obtain the exact number of residences in 2012 was not available this many years later, an estimate was derived using the total number of addresses created on December 31, 2012 or earlier that were for residential and group quarters land uses (excluding houseboats and long-term hotel lodging) and that are within the city limits as of August 25, 2001.

Relationship to UGB land supply and demand model: This relationship is a *not* a direct input into a land supply and demand model, however the population growth rate and number of new dwellings needed for the 20-year period are direct inputs.

Takeaway: Over the monitoring period, the percent increase and average annual growth rate for new dwellings was higher than the population growth. **With an AAGR of 1.4% for new housing compared to 1.2% for population, new housing has outpaced population growth by a bit**. In addition, the growth rates over the monitoring period are higher than the Adopted Forecast for both housing and population, which are forecast at 1.1% and 0.9% respectively.

Population Growth to New Dwellings 2012-2021
Population through 2021, housing through 2020

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	Net Change	Percent Change	AAGR
Eugene population (city limits)	158,335	159,580	160,775	163,400	165,885	167,780	169,695	171,210	173,620	175,626	**17,291**	10.9%	**1.2%**
Net new dwellings issued		1,040	1,178	660	678	742	852	996	1,171		7,317		
Total residential dwellings*	63,671	64,711	65,889	66,549	67,227	67,969	68,821	69,817	70,988		**7,317**	11.5%	**1.4%**

Compounded growth rate
*Estimate. Derived from residential and group quarters addresses from 2012 or earlier within city limits on 8/25/2021

Sources:
2012-2021: City of Eugene Planning and Development Department, building permits database
Historical Data: Portland State University, College of Urban and Public Affairs, Population Research Center for certified city limits estimates

Note that the AAGR for Eugene's population stays at 1.2% even if 2021 is excluded to match the end year for the new dwellings.

Dwellings by Housing Mix

Overview: Dwellings by housing mix is the percentage of each housing type that makes up total net new dwellings. The three housing categories include single-family detached, single-family attached, and multi-family. Each category includes the following housing structure types:

- Single-family detached: one-family detached dwellings (one dwelling on a lot with no more than one other dwelling), manufactured homes in or not in a manufactured home park, accessory dwellings, single-family dwellings accessory to non-residential uses (with an office, a security guard dwelling)
- Single-family attached: townhouses, rowhouses, condominiums which are attached dwellings but on their own tax lot
- Multi-family: structures with two to four dwellings (duplex, triplex, or fourplex on their own lot with no other dwellings) or 5+ dwellings. Also includes single-family detached on a lot with two or more dwellings and single-room occupancy dwellings (SROs).

The names and categorization of the different housing types used in this report are from the adopted 2012-2032 housing needs analysis and UGB. These are likely to change with the future adoption of the middle housing code amendments.

Data Source: Same as *Dwellings Per Year and Dwellings on Average Per Year*.

Relationship to UGB land supply and demand model: The mix of housing types to plan for ("housing mix") is a **key direct input** into a land supply and demand model and is an adopted assumption; new housing over the 2012-2032 period is planned to be a mix of 55% single-family detached housing types and 45% multi-family housing types (8% for single-family attached and 32% for other attached housing types).

Takeaway: Over the 2012-2021 monitoring period **Eugene's housing mix has experienced slower production of new single-family detached dwellings and a higher rate of new multi-family dwellings than forecast and when compared to 2001-2012 historical data**.

- Historically, from 2001 to 2012, single-family detached dwellings made up more than 50% of new dwellings, with 41.6% attributed to multi-family dwellings and 0.5% to single-family attached.
- During the 2012 to 2021 monitoring period, net new single-family detached dwellings were 27.3% (2,191) of the new dwellings, with 72% attributed to multi-family (5,742) and 0.9% to single-family attached (78).
    - Multi-family (5,742 new dwellings):
        - 93% (5,324 dwellings) of new multi-family dwellings are in structures that contain 5+ dwellings.
        - About 35% (1,984 dwellings) of new multi-family dwellings are identified as "potentially student-oriented housing"[41] and 98% of the student-oriented housing is structures with 20 or more dwellings.
        - About 65% (3,752 dwellings) are traditional, not student-oriented multi-family housing.
        - The multi-family production has been overwhelmingly structures of 5+ dwellings. Whereas 2-4 dwelling types (duplexes, triplex, fourplexes) are well below the pace to meet the projected need.
    - Single-family attached (78 new dwellings): A slight increase in new single-family attached dwellings, from 0.5% to 1.0%, occurred in the 2012-2021 monitoring period compared to 2001 to 2012.
- Should the development trend from 2012-2021 continue until 2032, the number of new multi-family dwellings would increase substantially, making up approximately 34% more of the

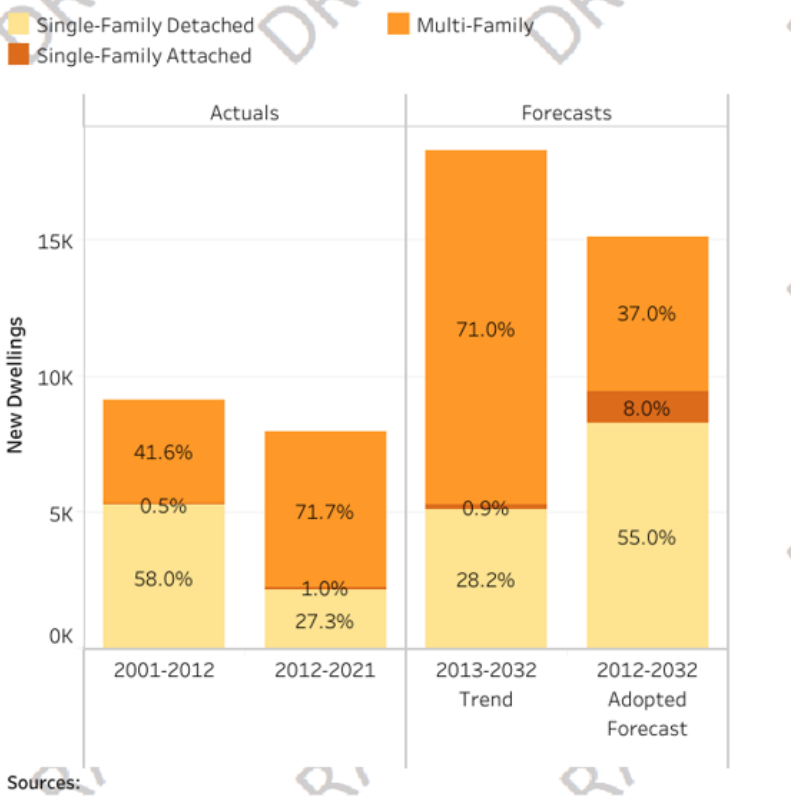
[41] Housing was identified as "potentially student-oriented housing" if it was three or more dwellings in the West or South University Neighborhood boundaries or appeared as primarily marketed to students such as in the project or developer's name or marketing materials. Projects that are apartments that market to students but not primarily were not included.

housing mix than the 2012-2032 Adopted Forecast planned. On the other hand, there would be a decrease in new single-family dwellings, making up 26.8% less of the housing mix than the Adopted Forecast.

It should be noted that original analysis of building permits during the UGB process showed about 7% of Eugene's building permits from 2001-2012 as single-family attached dwellings, but after the analysis was complete it was realized that many of these permits were duplexes and not single-family attached dwellings (meaning they were attached dwellings on the same lot rather than attached and on separate lots). That is why the Adopted Forecast proposed to increase that percentage slightly to 8% for single-family attached, which is likely much higher than Eugene may actually experience. Single-family attached only accounted for 1% of new dwellings during the 2012-2021 monitoring period.

Number/Percentage of Dwellings by Housing Mix

Some 2012 permits are included in the monitoring data because their development was not already clearly accounted for on the BLI. Partial year permits in 2012 and the current year are excluded from the Trend calculation.



Sources:

2001-2012: City of Eugene Planning and Development Department, Issued Phased and Non-Phased Building Permits

2012-2021: City of Eugene Planning and Development Department, building permits database

2013-2032 Trend: City of Eugene Planning and Development Department, building permits database

Adopted Forecast: City of Eugene Planning and Development Department, Eugene Land Model

Percentage of Dwellings by Housing Mix Subcategory and BLI Plan Designation

Overview: This chart is a slightly more detailed look at the housing mix, it splits the multi-family housing mix category into two subcategories and shows the percentage of each housing subcategory that contributes to the total number of net new dwellings in each plan designation.

Data Source: Same as *Dwellings Per Year and Dwellings on Average Per Year*. The Adopted Forecast plans for new housing to be a certain mix within each plan designation.

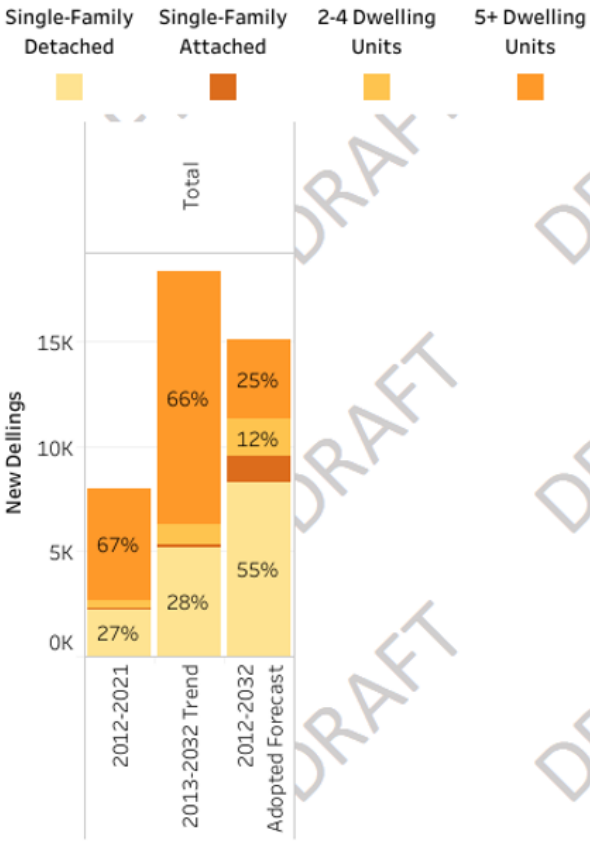
Relationship to UGB land supply and demand model: The percentage of the new dwellings by each housing subcategory for each BLI plan designation is a **key direct input** into a land supply and demand model and are adopted assumptions (as shown in the following charts).

Takeaway: **Multi-family 5+ dwellings exceeded the percentage of forecast dwellings in all of the residential BLI plan designations and in the Commercial plan designation**. Zero 5+ dwelling structures were included in the Adopted Forecast for Low Density Residential land but made up 19% of new housing on Low Density land, mostly in the form of apartments in assisted care developments and affordable housing developments and one large apartment complex. On Medium Density Residential land, multi-family 5+ dwellings made up 70% of new dwellings, double the 35% that was forecast. On High Density Residential land, 5+ dwellings made up 91% versus the 85% forecast. On Commercial land, 5+ dwellings made up 97% of new dwellings, essentially matching the forecast. No dwellings were forecast for Government & Education land, but 283 new dwellings occurred, primarily from affordable housing developments.

In total, multi-family buildings with 5+ dwellings were higher than expected and in residential plan designations the percentage of all other housing types was lower than forecast.

Percentage of Dwellings by Housing Mix Subcategory and BLI Plan Designation

2012 permits were included in monitoring years only if not already clearly accounted for in the BLI. Housing Mix Subcategories Commercial and Group Quarters (potential) are excluded from this chart. Trend calculations are for all data from 2013 through the last complete review year 2020.



Sources:

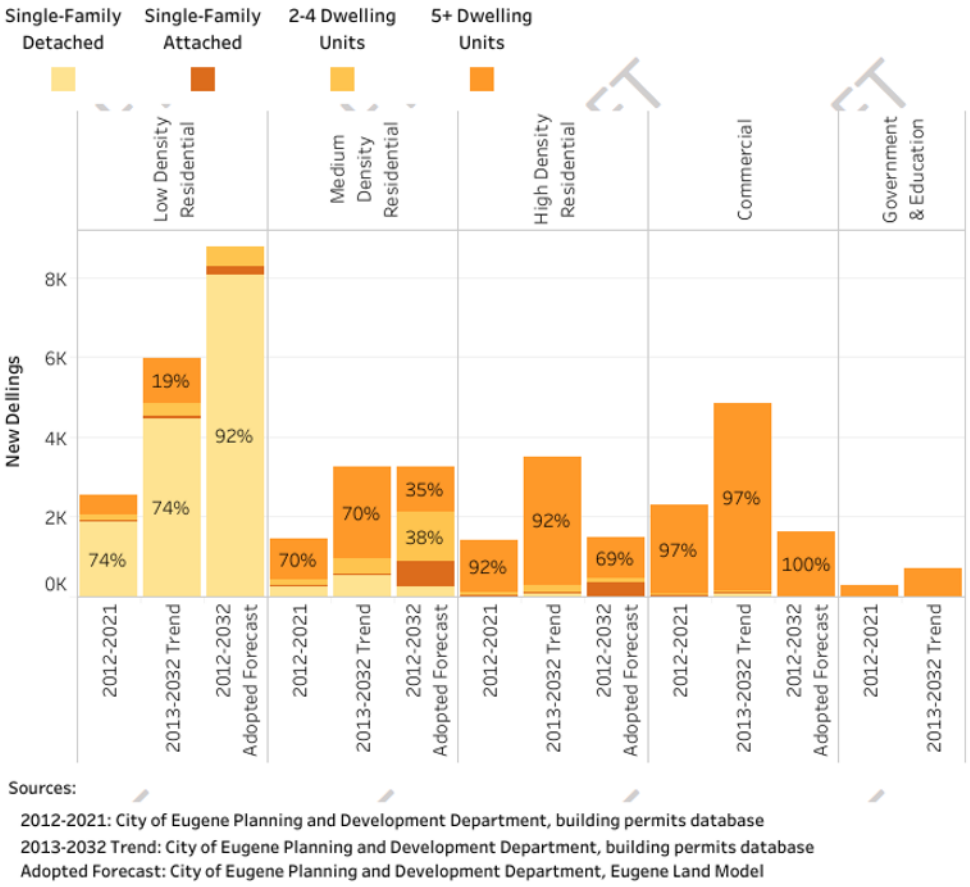
2012-2021: City of Eugene Planning and Development Department, building permits database

2013-2032 Trend: City of Eugene Planning and Development Department, building permits database

Adopted Forecast: City of Eugene Planning and Development Department, Eugene Land Model

Percentage of Dwellings by Housing Mix Subcategory and BLI Plan Designation

2012 permits were included in monitoring years only if not already clearly accounted for in the BLI. Housing Mix Subcategories Commercial and Group Quarters (potential) are excluded from this chart. Trend calculations are for all data from 2013 through the last complete review year 2020.



Sources:
2012-2021: City of Eugene Planning and Development Department, building permits database
2013-2032 Trend: City of Eugene Planning and Development Department, building permits database
Adopted Forecast: City of Eugene Planning and Development Department, Eugene Land Model

*Note: This chart does not include Industrial or Parks and Open Space BLI plan designations. While not part of the adopted projections or shown on these charts, it is noted that some housing has developed on non-traditional housing plan designations: a small amount of housing (3 dwellings) has occurred on Industrial plan designations such as a security dwelling for a storage facility, and some housing on ridgeline area land that is designated as Parks and Open Space but platted for housing (5 dwellings).

Dwellings by Housing Mix and the Remaining Housing Need

Overview: Dwellings by housing mix and the remaining housing need includes the number of net new dwellings developed over the monitoring period by housing type with the percentage of the forecast met and the amount left to accommodate during the remainder of the 2012-2032 period.

Data Source: Same as *Dwellings Per Year and Dwellings on Average Per Year*.

Relationship to UGB land supply and demand model: The mix of housing types to plan for ("housing mix") is a **direct input** into a land supply and demand model and is an adopted assumption; new

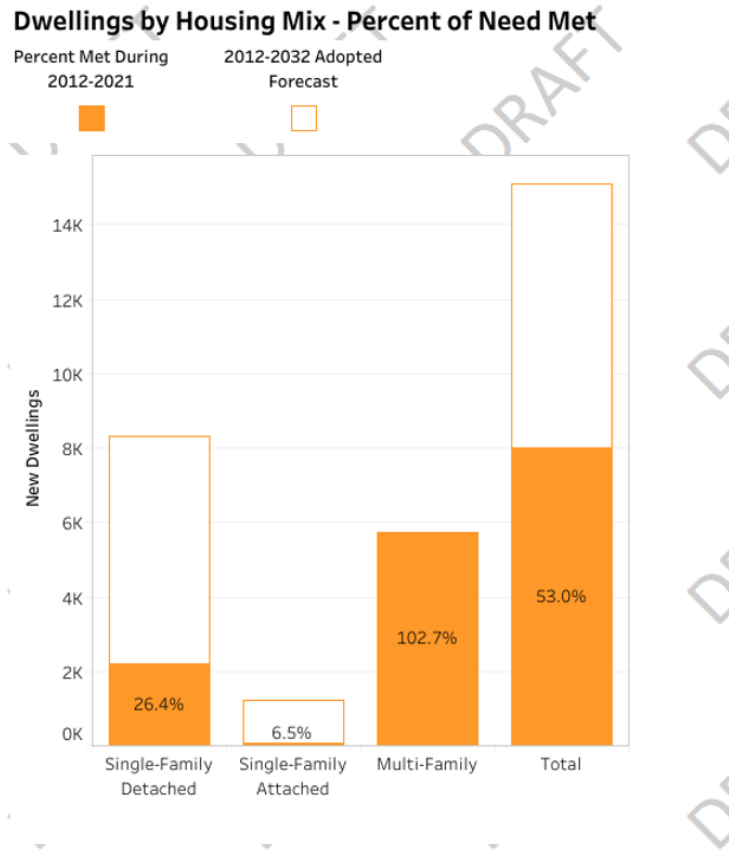
housing over the 2012-2032 period is forecast to be a mix of 55% single-family detached housing types and 45% multi-family housing types (8% for single-family attached and 32% for other attached housing types).

Takeaway: By July 2021, multi-family development for the 2012-2021 period already exceeded the forecast of new multi-family housing needed through 2032, in comparison single-family housing is well below the forecast pace. In short, **about half (53% or 8,011 dwellings) of the total housing needed through 2032 has been met but is being met predominately through multi-family housing development, and specifically larger multi-family development**.

- Multi-family - Eugene has met 102.7% (with 5,742 dwellings) of its adopted multi-family housing need as defined in the UGB analysis. However:
  - 2-4 dwellings – 23% (412 dwellings) of adopted need met
  - 5+ dwellings – 141% (5,330 dwellings) of adopted need met
- Single-family attached- Only 6.5% (78 dwellings) of adopted need met
- Single-family detached - At the same time, nearly halfway through the 2012-2032 planning period, only 26.4% (2,191 dwellings) of the forecast for single-family detached housing has been met.

It should be noted that as seen in the *Dwellings on Average Per Year* chart previously discussed, housing development can be cyclical. Often single-family and multi-family housing types do not experience a building boom at the same time but rather they alternate. Review of the historical data shows that the 2001-2006 single-family boom (64-92% of new dwellings) was followed by a slowing of single-family in 2011-2015 (21-35% of dwellings) because single-family development is often tied to what is happening in the broader economy (a recession). Whereas during that same time, the multi-family boom occurred from 2011-2015 (64-79% of dwellings) during the recession potentially because Eugene was coming off an earlier low multi-family cycle. Although it is a common refrain since at least 2012, the belief continues to be heard that Eugene's larger multi-family housing development should be slowing down. Part of the reason for the growth in multi-family housing has been the development marketed for students and around the University of Oregon. Building that specific type of housing cannot continue indefinitely, especially if the University does not grow a lot. Furthermore, **while Eugene may have met the adopted multi-family need, there are deficiencies in the housing supply that still need to be addressed, especially for housing affordable to lower income households**. For instance, according to Lane County's Human Services Division, the Homeless By-Name List identifies the number of active homeless individuals sleeping within Eugene at an emergency shelter, an alternative shelter, on the street, or in a vehicle and have received services in the past 90 days. In June 2021 that number was 2,506 up from 1,109 in June 2019 (which may not include individuals sleeping in unincorporated areas) suggesting there are still unmet housing needs.[42]

[42] https://public.tableau.com/views/HomelessnessinLaneCountyOregon_16195399452050/IntroductiontoLaneCountysHomelessnessData?:language=en-US&:display_count=n&:origin=viz_share_link, select Population Data.



Sources:

2012-2021: City of Eugene Planning and Development Department, building permits database
Forecast Data: City of Eugene Planning and Development Department

Mix of Existing Housing Stock

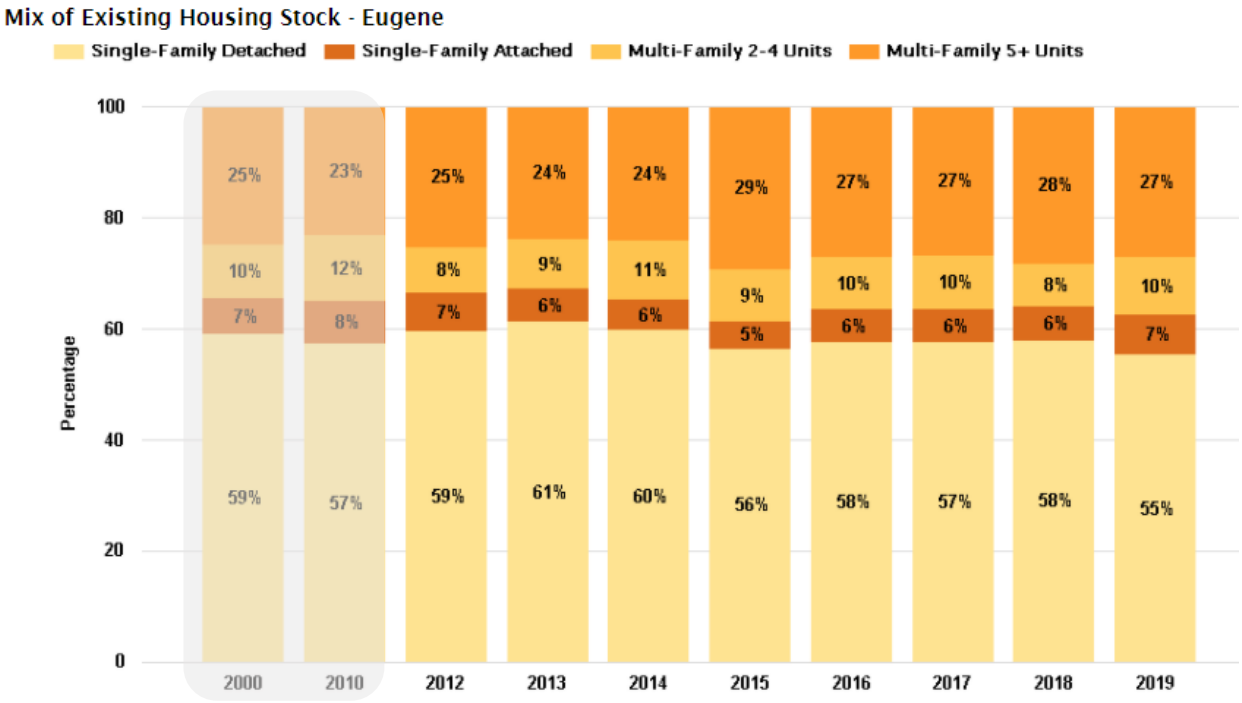
Overview: The mix of Eugene's existing housing stock, "housing mix," is the percentage of all of Eugene's *existing* housing categorized by housing type. ACS responders indicate what type of housing they live in at the time of the survey. As previously discussed under *Dwellings by Housing Mix*, it is typically expressed as the percentage of single-family and multi-family, or single-family detached, single-family attached and multi-family.

Data Source: For existing housing stock data, the ACS provides recent data based on a sample of Eugene households (housing type can also be derived from address point data, but this chart uses ACS data). After 2000, the type of housing people live in is no longer collected during the Decennial Census, so it is only available as ACS sample data from 2001 forward.

Relationship to UGB land supply and demand model: While the mix of Eugene's existing housing stock helps inform what mix to plan for in the future for new housing, the mix of existing housing stock is *not* in itself a direct input into the land supply and demand model. (What housing mix to plan for in the future for new housing is a direct input into a land supply and demand model.)

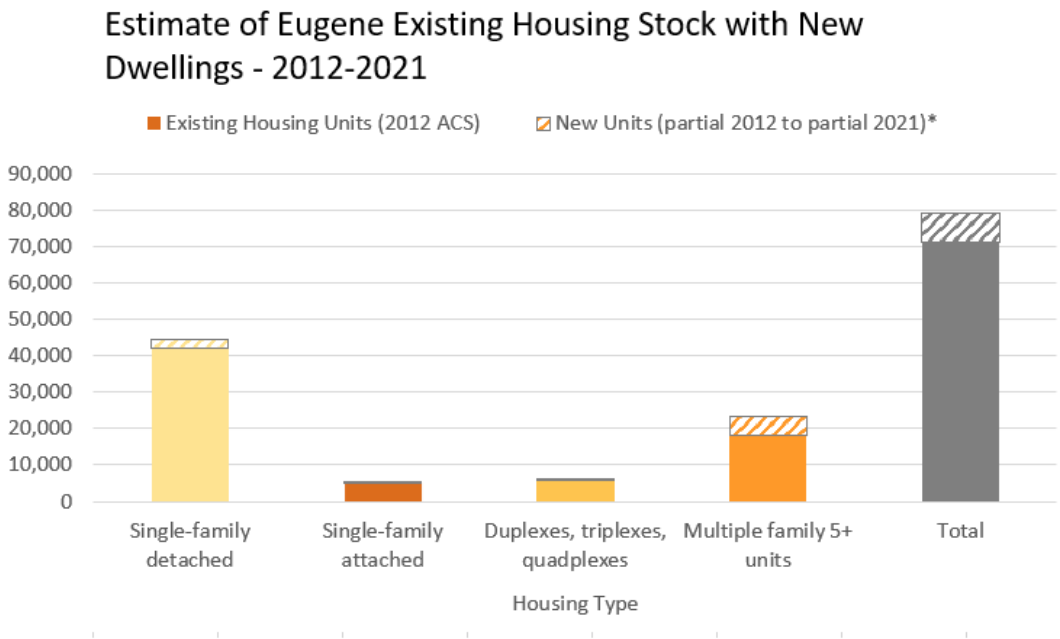
Takeaway: The mix of Eugene's existing housing stock has not changed (and typically does not change) quickly over time. According to the ACS, Eugene had 76,076 dwellings in 2019, the existing housing stock was about 55% single-family detached housing types and 45% multi-family (7% single-family attached, 37% other attached housing types). In 2000 (59% single-family, 42% multi-family) and 2010 (57% single-family, 43% multi-family) these ratios were very similar. **Even though the mix of new housing over the monitoring period has been predominately multi-family, the amount (5,742 dwellings) has not been enough to noticeably shift the overall mix**.

The margin of error of the 1-year ACS for Eugene is a caution with this data because the single-family attached data set is very small and the changes in percentage over time may not be as significant as it appears.



Source: U.S. Census American Community Survey 1 Year Estimates, Table B25024; U.S. Census 2000, SF3 Table H30

For another way to look at how the mix of existing housing stock is changing, the chart below estimates how much of Eugene's existing housing stock in 2012 was in each housing type category according to the 2012 ACS, coupled with how many new dwellings have been added since that time during the monitoring period. It shows how the overall housing stock often shifts slowly over time, even when there are periods of more development of one type of housing like Eugene is experiencing now with multi-family housing. Based on this 2012 estimate plus the new dwellings, over the monitoring period the housing mix shifted with single-family detached down from 59% to 56% of the housing stock, single-family attached remaining at 7%, and multi-family housing up from 34% to 37%.



Housing Efficiency Measures

Efficiency measures, also called development incentives, are actions the City takes to facilitate development that uses land more efficiently than would have occurred without these incentives, based on historical trends. Efficiency measures, such as changes to land use regulations to remove development barriers or providing financial incentives, increase the expected capacity of land for additional housing (or jobs) development beyond what is likely to occur if the City does not make these changes or offer these incentives.

Efficiency measure actions for housing that were adopted as part of the 2012-2032 UGB adoption analysis include:

- **Accessory Dwellings** (ADU): The land use regulations were amended in July 2018 to remove some development barriers for ADUs. A new 100% credit to be applied towards transportation systems development charges at the time of permit became effective in 2019. (Dwelling estimates from this incentive are not initially automatically included in the charts in this section but some charts are amended to reflect manual analysis of data.)
- **Affordable Housing Land Bank Sites:** The City acquired property and prepared it for future affordable housing, including selling it at a less than market rate value for affordable housing development.

- **Downtown Programmatic Approach:** City staff and programs provide a multifaceted programmatic approach to development assistance in this area and the land use regulations were amended (effective August 2013) to remove barriers to housing downtown including at the former EWEB riverfront site (also effective August 2013, amended in 2017 and 2019). The 2012-2032 UGB analysis adopted this programmatic approach as the efficiency measure for downtown, recognizing that downtown projects often benefit from a combination of the downtown tools or programs. However, since it is also helpful to know how many dwellings used each tool or program, this report includes both the number of dwellings in the programmatic approach and the number utilizing each downtown tool and program. This includes development that:
    - is within the **Downtown Plan Area** boundary, and/or
    - received a **Multi-Unit Property Tax Exemption** (MUPTE), and/or
    - is within either the **Downtown or Riverfront Urban Renewal Districts and received financial incentives**. Urban Renewal or Tax Increment Financing is a tool used by municipalities to finance improvements and redevelopment in specific areas of a city by reinvesting the increase in the area's property taxes.
- **Land was Re-designated to Low Density Residential**: As part of but prior to adoption of the UGB, in July 2014 the City re-designated the 16.9 acre Irving Road/former Eagles Lodge site (re-designated from Parks and Open Space), the 9.6 acre Gilham Road site, and 174 acres of the Crow Road area (both redesignated from Medium Density Residential land).
- Projects identified as **student housing and/or that received MUPTE in 2013**: projects with unique financial conditions in that either the City granted a MUPTE (under the previous version of the MUPTE program) and/or that they were student-oriented housing downtown or near the University of Oregon. These projects were submitted, or were not submitted yet but were identified as reasonably likely to occur, between 1/1/13-10/18/13 (for permits issued 12/4/12-2/20/14).
- **Increased Density on Medium Density Residential / R-2 Zoned Land**: In conjunction with adoption of the UGB, the land use regulations were amended in 2017 to increase the minimum density required to be met at development from 10 to 13 dwellings per net acre, in order to increase the overall average net density of Medium Density Residential to 15.4. (Dwelling estimates from this incentive are not initially automatically included in the charts in this section but some charts are amended to reflect manual analysis of data.)

There are additional development incentives that the City provides for housing that were not included in the adopted efficiency measure estimates but that will also be monitored, including:

- **Low Income Rental Housing Property Tax Exemptions** (LIRHPTE): 20-year tax exemption for low-income rental housing (households with up to 60% of the area median income).

- **SDC credits on key transit corridors, downtown and proximate to frequent transit routes:** New credits applied towards transportation systems development charges at time of permit for residential buildings downtown (30% credit), residential along a key corridor (15% credit) and residential within 0.25 mile (10% credit) or 0.5 mile (5% credit) of an adopted LTD Frequent Transit Route (effective 1/1/2019).
- **Credits towards various system development charges for affordable housing** (rental households with up to 60% of the area median income, owner households up to 80% area median income).
- (future) Additional development incentives will be monitored in the future, e.g., middle housing; the land use code will be amended to remove barriers to building these housing types.

It is noted that some residential efficiency measures have financial caps or other constraints. For instance, credits towards systems development charges may be limited by an annual cap on the total amount of credits that can be awarded.

Dwellings from Efficiency Measures

Overview: *Dwellings from Efficiency Measures* shows the total number of net new dwellings from issued building permits that used, or were in areas of, efficiency measures compared to the new dwellings not using any efficiency measures.

Some projects received more than one efficiency measure. All dwellings receiving any efficiency measures are included, however for this chart, dwellings that received more than one efficiency measure are only represented once.

Data Source: The number of net new dwellings permitted that used efficiency measures comes from the City of Eugene's Planning and Development Department land use and building permit data, GIS data, and the Community Development Division's incentives data. Note that these charts do not include analysis of measures that need manual review. These charts do not initially include the R-2 minimum density efficiency measure because the success of that incentive is analyzed through an analysis of density achieved rather than counting any new dwellings in the zone. Similarly, these charts do not initially include analysis of accessory dwellings because the success of that incentive is analyzed through an analysis of the net increase beyond the average otherwise expected to occur without the incentives, rather than counting any new accessory dwelling.

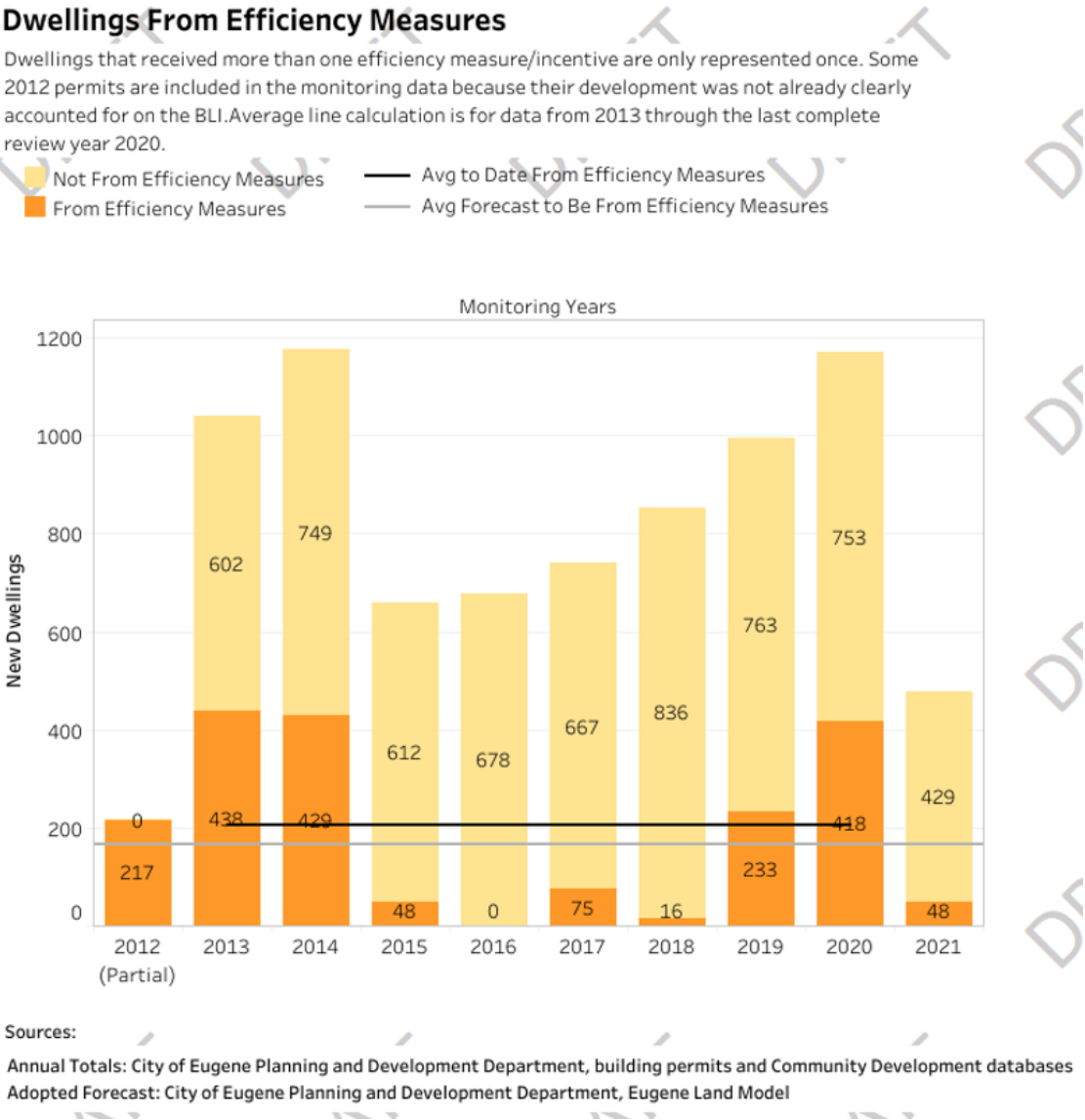
Relationship to UGB land supply and demand model: The number of additional dwellings development capacity that each efficiency measure is anticipated to increase the capacity of the land supply by is a **key direct input** into the land supply and demand model and are adopted assumptions. These estimates reduce the amount of land needed for a UGB expansion to accommodate the projected housing.

Takeaway: As *preliminarily* calculated on this chart, 1,922 of the 8,011 new dwellings utilized efficiency measures, however as noted below with additional manual analysis to address the increased density from R-2 dwellings and the net increase in accessory dwellings, **the total dwellings utilizing efficiency measures increases to 2,248 over the monitoring period**.

However, even using the *preliminary* estimate that do not include the additional R-2 dwellings from increased density or the accessory dwellings, **the number of efficiency measure dwellings was slightly higher on average during the monitoring period than forecast for the 20-year period; dwellings using efficiency measures was forecast to be at 165 dwellings per year, but the preliminary annual average for the 2013-2020 period was 207**.[43] This average was impacted by zero efficiency measure dwellings in 2016 and the dramatic increase in 2020 when there were 418 efficiency measure dwellings. Two separate 12-story apartment building were issued permits in 2020, one of them with 208 dwellings (the former Café Yumm site on Broadway) did not use efficiency measures and the other with 357 dwellings (the former Travel Lodge site on Broadway) are efficiency measure dwellings due to their location within the Downtown Plan boundary.[44]

[43] The average number of dwellings per year using efficiency measures shown in the chart does not include partial year data (2012 or 2021) because adding more years to the average without a full years' worth of data artificially lowers the annual average. Regarding total dwellings, the reason all of the dwellings from the 2012 partial year are efficiency measure dwellings is because they are from the large Capstone apartment project at 13th and Olive/Willamette which received MUPTE. The previous UGB analysis counted all dwellings from this project as providing additional capacity in the UGB because it received incentives, even though 217 of the dwellings were issued in 2012. There are a few other 2012 permits that utilized efficiency measures, but these permits were actually issued in 2013 and are reflected in that year.

[44] Note that not every dwelling from these permits is counted as an efficiency measure, only those that increase the expected capacity for housing beyond what is likely to occur if the City does not make efficiency measures available.



Efficiency Measure Dwellings by BLI Plan Designation

Overview: *Efficiency Measure Dwellings by BLI Plan Designation* shows the net number of new dwellings from issued building permits that used efficiency measures that will be built on land designated generally as residential (orange) or a non-residential (blue) type of comprehensive plan designations.

Data Source: Same as *Dwellings from Efficiency Measures*. Note that these charts do not include analysis of the R-2 minimum density efficiency measure because the success of that incentive is analyzed through an analysis of density achieved rather counting any new dwellings in the zone. Similarly, these charts do not initially include analysis of accessory dwellings because the success of

that incentive is analyzed through an analysis of the net increase beyond the average otherwise expected to occur without the incentives.

Relationship to UGB land supply and demand model: The number of additional dwellings capacity that each efficiency measure is anticipated to increase the capacity of the land supply by in each plan designation is a **direct input** into the land supply and demand model and are adopted assumptions. These estimates reduce the amount of land needed for a UGB expansion to accommodate the projected housing for each plan designation.

Takeaway: In gross numbers, new dwellings have utilized efficiency measures more than anticipated at this point in the monitoring period. During the monitoring period the chart initially shows that 1,922 dwellings were permitted that used efficiency measures but with additional analysis, that number increases to 2,248 (with the manual analysis of R-2 and accessory dwellings) which is almost two thirds (68%) of the forecast of 3,296 dwellings for the efficiency measures addressed in this chart.[45] In total, if the trend from 2013-2020 continued through 2032, the total dwellings from the types of efficiency measures in this chart would exceed the forecast need.

Preliminary Efficiency Measure Dwellings Summary:

However, **when broken down by housing type and plan designation the forecast for new dwellings utilizing efficiency measures is on pace in some areas but not in others**. On High Density Residential and Commercial lands, the efficiency measure need is either met during the monitoring period or on track to be met by 2032, however the dwellings utilizing efficiency measures on Low Density Residential land is slower than needed to meet the 2032 forecast for that plan designation. Only 5% of the preliminary efficiency measure dwellings were single-family detached.

- Commercial plan designations had the most dwellings that utilized efficiency measures, has met 78% of the forecast, and if this trend continues to 2032 would exceed the forecast. Commercial land also has the highest forecast need for dwellings using efficiency measures.
- Low Density Residential efficiency measure dwellings, if the trend continues to 2032, would be almost 54% short of the forecast need. The slower pace of efficiency measure dwellings on Low Density Residential land is likely because most of the forecast need was anticipated to be provided on land re-designated to Low Density Residential. The main re-designation area, Crow Road, is more than 170 acres that is mostly not yet served with the utilities needed for annexation and development. About half of the 138 efficiency measure dwellings on Low Density Residential land are from the other sites that were re-designated to Low Density (Gilham Road and Irving Road sites) and the other half are from Landbank/LIRHPTE sites as discussed below. Also, as further detailed under *Dwellings by Efficiency Measure*, due to additional analysis the chart below is amended to show the net increase of 21 ADUs above the

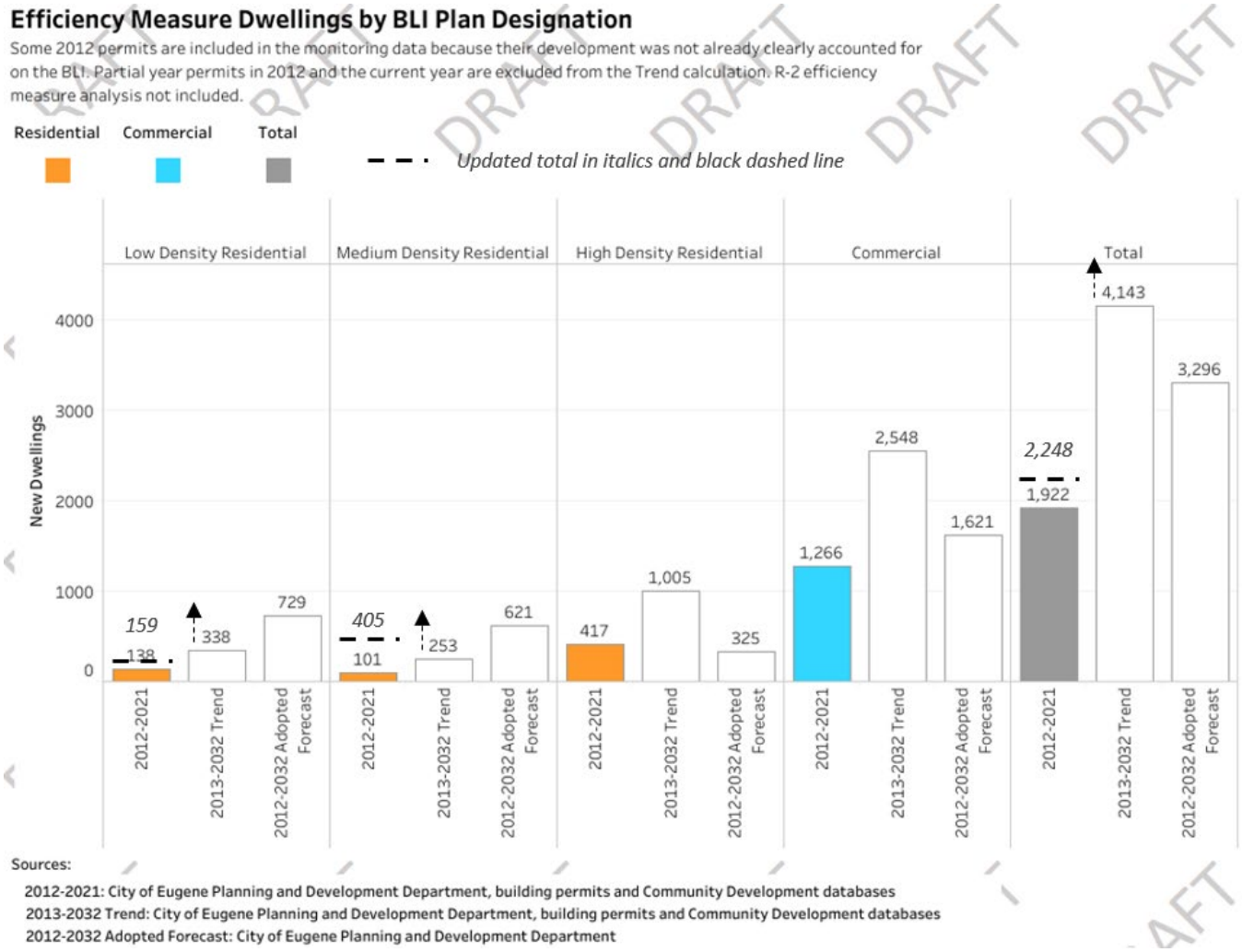
[45] There are 566 dwellings of the efficiency measures forecast that is anticipated over 20 years from the increase to the R-2 zone minimum density. Dwellings from this efficiency measure are not initially addressed in this chart, but the chart is revised below with a dashed black line to represent the number of additional new dwellings from this measure.

average that have been issued since the ADU efficiency measure actions were adopted, increasing the total Low Density efficiency measure dwellings to 159.

- Medium Density Residential efficiency measure dwellings, if the trend continues to 2032, appears initially in the chart to be below the forecast need, however the 101 efficiency measure dwellings are only those from the Affordable Housing Land Bank efficiency measure. Most of the Medium Density efficiency measure forecast need is from the 566 dwellings anticipated from the minimum density increase in the R-2 zone. As detailed below under *Dwellings by Efficiency Measure,* additional analysis found that 304 dwellings have been permitted since the minimum density was increased that can be counted towards meeting the Medium Density Residential land forecast, increasing the total Medium Density efficiency measure dwellings to 405.
- High Density Residential land has already exceeded the forecast need for dwellings using efficiency measures (188% of forecast). More analysis could be done regarding what kind of housing efficiency measures are producing, such as is it mostly market-rate or affordable or student housing). So far, over the monitoring period 99% of efficiency measure dwellings on High Density Residential land are flagged as potentially student-oriented housing.
- Commercial land is on pace to exceed the forecast for efficiency measure dwellings if the current trends continue of more high density housing downtown and near the University campus through 2032.

Revised Efficiency Measure Dwellings Summary:

- Given the additional manual analysis of accessory dwellings and dwellings using efficiency measures on Medium Density Residential land detailed below under *Dwellings by Efficiency Measure*, the *Efficiency Measure Dwellings by BLI Plan Designation* chart has been amended below (see black dashed lines with revised numbers), bringing the total efficiency measure dwellings to 2,239. On Low Density Residential land this brings the total up to 159 which is 22% of the forecast need for efficiency measure dwellings, and on Medium Density Residential land up to 405 which is about 65% of the forecast need for efficiency measure dwellings. The chart is also amended to indicate that the 2013-2032 Trend projections would be even higher (see black arrow) if the revised numbers were included in the Trend calculation (which has not been done).



Dwellings by Efficiency Measure and Plan Designation

Overview: *Dwellings by Efficiency Measure and Plan Designation* shows the net number of new dwellings from issued building permits by the specific type of efficiency measures the project utilized. Dwellings are categorized at a high level according to whether they will be built on land with a residential (orange) or non-residential (blue) type of plan designation, the bars are also divided with gray lines for individual plan designations within the categories. Note, in parenthesis in the efficiency measure title is which plan designation the dwellings were anticipated to occur on. For example, "Affordable Housing Land Bank Site (MDR)" means an increase in dwellings was anticipated on Medium Density Residential land from this efficiency measure. However, the gray line in the bar shows that some of these efficiency measure dwellings occurred on other residential plan designations besides on Medium Density where they were forecast to occur. Again, efficiency measure dwellings anticipated from accessory dwellings and the R-2 zone minimum density increase are not included in this chart.

Some projects received more than one efficiency measure. All new dwellings receiving any of the efficiency measures identified in this chart are included here. Different from the earlier charts, in this chart, dwellings that received more than one efficiency measure are represented under *each* incentive, so the total number of efficiency measure dwellings permitted in the monitoring period cannot be calculated from this chart without double counting dwellings that utilized more than one efficiency measure. The exception is the category labeled Downtown Plan, MUPTE, Urban Renewal, which is for the combined programmatic approach, in this category dwellings are only represented here once even if they received more than one of these three types of incentives.

Data Source: Same as *Efficiency Measure Dwellings by BLI Plan Designation*.

Relationship to UGB land supply and demand model: Same as *Efficiency Measure Dwellings by BLI Plan Designation*.

Takeaway: With a few notable exceptions, the total number of dwellings anticipated for each type of efficiency measure discussed in this chart has been met or is on pace to be met, if not entirely in the plan designation it was anticipated for. In alignment with the *Efficiency Measure Dwellings by BLI Plan Designation* discussion above, **the efficiency measures associated with Commercial and High Density Residential land have experienced the most use and are on track to meet their forecast need, while those associated with Low Density Residential land have experienced the least use and are slower than needed to meet their forecast need** due most likely to the bulk of the Low Density Residential efficiency measure being in an unserved/unannexed area.

Efficiency measures, city-wide:

- Dwellings on **affordable housing land bank sites** exceeded the forecast for 55 dwellings with 101 dwellings occurring on Medium Density land over the monitoring period. In addition, 53 of the 101 dwellings occurred on Low Density Residential land where zero were projected. Dwellings that utilized the **Low Income Rental Housing Property Tax Exemption (LIRHPTE)**, some of which were also affordable housing land bank sites, were not part of the initial incentives forecast but given the program is a tax incentive and the overlap with the affordable housing landbank program, these dwellings are being counted as efficiency measure dwellings. Where dwellings received both incentives the dwelling is only counted once.
- Dwellings from **residential re-designation** (re-designating some lands to Low Density Residential) have developed less than expected for this time and if trends continue to 2032 would be significantly short of the 645 dwelling forecast need. This is because most of the forecast need (561 of the 645 dwellings) is projected for the Crow Road area and while 174 acres of the Crow Road site were re-designated to Low Density Residential land, most of that is not yet served with the utilities needed for annexation and development. The 71 new dwellings identified in the chart are in the other two re-designated sites (Gilham Road and Irving Road), which were forecast for 70 efficiency measure dwellings.

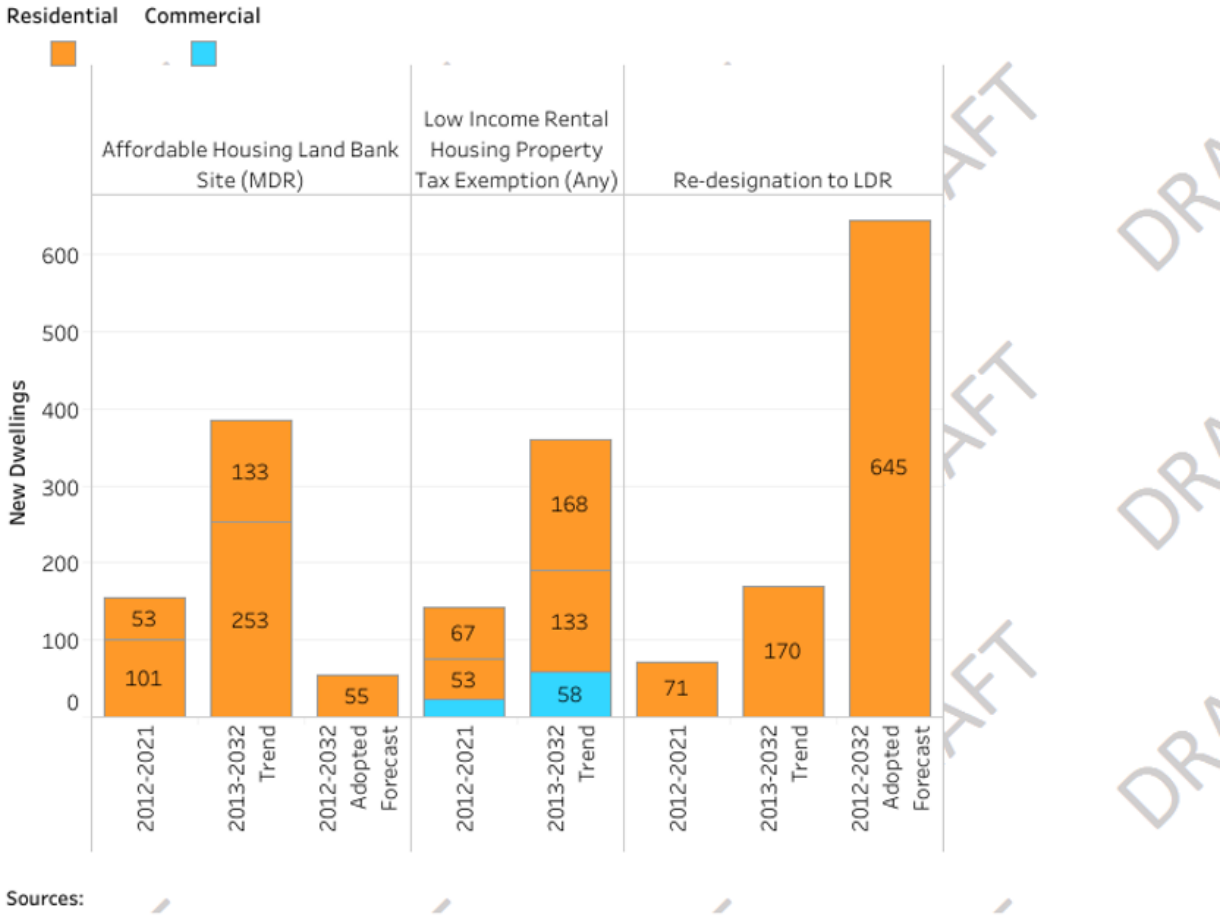
- **Accessory dwellings**- The UGB analysis forecast that Eugene would see 168 ADUs between 2012-2032 (or 8.4 ADUs per year) without efficiency measures and that would increase 50% (to 12.6 per year) with efficiency measures, adding 84 additional ADUs (252 total) over 20 years. ADUs benefitted from two different efficiency measure actions:
    - The land use code (and state statute) was amended a few times beginning in July 2018 to remove barriers to accessory dwellings.[46] Since July 1, 2018, 46 ADUs (or 15.3 per year[47]) have been permitted. That is 6.9 more ADUs on average per year, which over three years is a net increase of 21 ADUs since the efficiency measure came into effect.
    - In addition, effective January 1, 2019, ADUs were provided a 100% credit towards transportation systems development charges at the time of permit. Since the effective date and through mid-2021, 32 ADUs have received credits totaling $52,035.92 towards these permit charges.
    - Since the efficiency measure estimate was based on increasing the average number of ADUs per year through these two combined actions, the net increase of 21 ADUs above the average is counted as the efficiency measure dwellings. While this meets only 25% of the needed increase, the incentives only started around 2019; during the monitoring period there were 6 ADUs per year from 2013-2018 until 2019 when the average tripled to 19 per year (2019-2020).

[46] The effective dates of the two Eugene land use code amendments were 7/1/18 and 9/17/21. Although the 7/1/18 amendments were appealed and remanded, during that time, state statutes that removed some of the barriers identified in the City amendments were implemented as required. Additionally, Lane County amended its code allowing ADUs in more zones without annexation, effective 6/26/18.

[47] Annual averages in this report typically exclude partial year data, which would mean excluding 2018 and 2021 data from this calculation. But in this case, since the code amendments went into effect in July 2018 and the monitoring period data is through July 17, 2021, three years was used to calculate the average; 46 ADUs permitted during July 1, 2018 through July 21, 2021 is 19 ADUs per year.

Dwellings by Efficiency Measure and Plan Designation Category

Dwellings that received more than one incentive are represented under each incentive. Downtown programs estimate includes being in the downtown plan area or in the downtown or riverfront urban renewal areas. Some 2012 permits are included in the monitoring data because their development was not already clearly accounted for on the BLI. Trend calculations are for data from 2013 through the last complete review year 2020. R-2 and accessory dwelling efficiency measures analysis not included.



Sources:

2012-2021: City of Eugene Planning and Development Department, building permits and Community Development databases
2013-2032 Trend: City of Eugene Planning and Development Department, building permits and Community Development databases
2012-2032 Adopted Forecast: City of Eugene Planning and Development Department

- Dwellings **from increased density on Medium Density Residential/R-2 land** are not initially shown on the efficiency measure charts because only some dwellings on R-2 zoned land would count towards the efficiency measure and they require manual analysis to identify. In 2017 the land use regulations were amended to increase the minimum net density from 10 to 13 dwellings per net acre, in order to raise the overall average net density in R-2 to 15.4. Only the new dwellings that are above the original net density of 10 and were issued after the 2017 land use regulation amendment would count as an efficiency measure dwelling because that is the

increase over the number otherwise expected to occur absent the efficiency measure.[48] There were 304 net new dwellings from permits issued in 2017 or later with a net density above 10. The *Efficiency Measure Dwellings by BLI Plan Designation* chart is amended in the previous section with a dashed black line showing that with the 304 dwellings added, the total efficiency measure dwellings on Medium Density Residential land is up to 405, which is 65% of the forecast need for 621 additional dwellings on Medium Density Residential land.

Efficiency measures generally focused in the Downtown area:

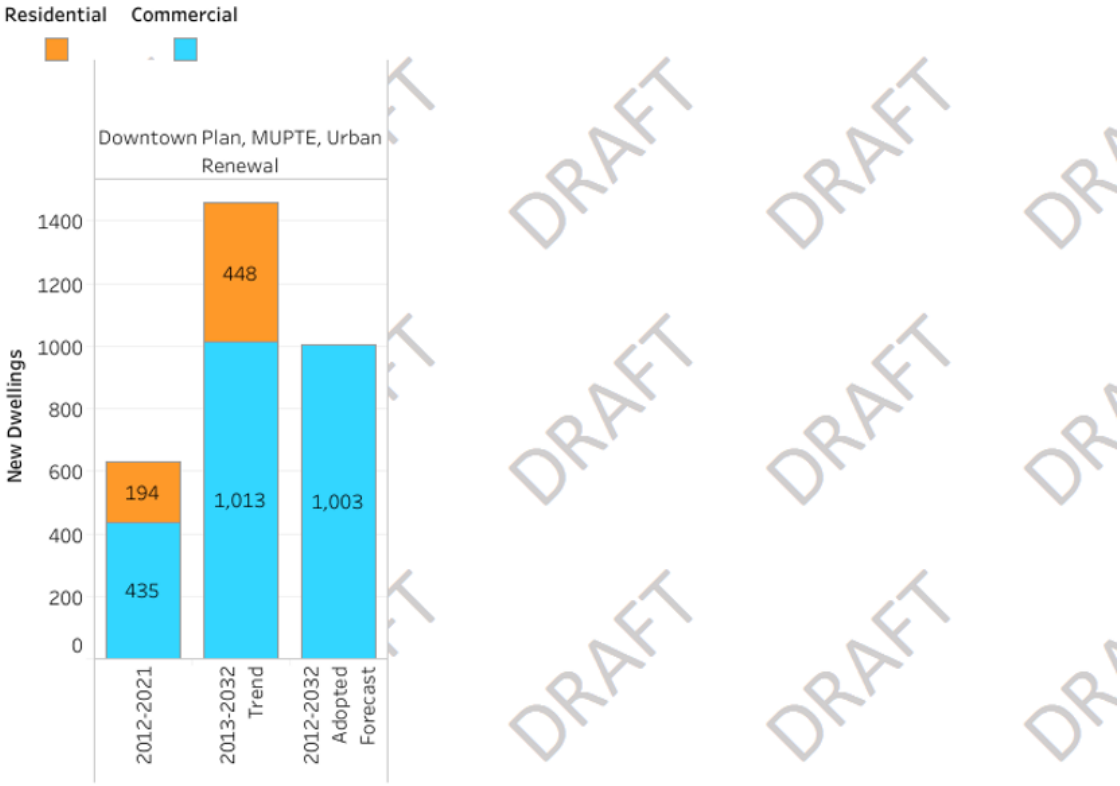
- The first estimate was that 943 additional dwellings would be incentivized as **student housing and/or MUPTE projects** on Commercial or High Density Residential land **downtown or near the University campus around 2013**, developing right after the 2012-2032 BLI had been run (366 of these dwellings were part of the Capstone/13th and Willamette Street development).[49] That estimate has been exceeded by 88 dwellings.
- The second estimate was that 1,003 more dwellings would be incentivized through **Downtown Programs**, by utilizing one or more of the downtown incentives on Commercial land.
    - The first chart below for downtown efficiency measures shows new dwellings that were from any of the Downtown Plan, MUPTE (but not including dwellings also in the Student Housing 2013 estimate) and/or Urban Renewal programmatic approach incentives, combined into one category where each dwelling *is only counted once* even if it received more than one of these three incentives. This combined chart is to understand how much of the 1,003 dwelling need downtown has been met with the programmatic approach. Even though MUPTE has been used less than anticipated since 2013 (for 177 dwellings), almost 63% (or 629) of the 1,003 forecast dwellings has been met (435 dwellings on Commercial and 194 on High Density Residential land downtown) and if this trend continues to 2032 is on track to exceed the forecast.

[48] Some of the 2017 dwellings are likely from pre-2017 approvals not subject to the newer 2017 minimum density. However, it would be difficult to refine the estimate any further to only the dwellings that had to meet the new minimum density.

[49] From Memorandum to Eugene City Council, Technical Summary – Updated Redevelopment Target for Multifamily Housing, Attachment C. Anticipated Student Housing memo, November 2013

Dwellings by Efficiency Measure and Plan Designation Category

Dwellings that received more than one incentive are represented under each incentive. Downtown programs estimate includes being in the downtown plan area or in the downtown or riverfront urban renewal areas. Some 2012 permits are included in the monitoring data because their development was not already clearly accounted for on the BLI. Trend calculations are for data from 2013 through the last complete review year 2020. R-2 and accessory dwelling efficiency measures analysis not included.



Sources:

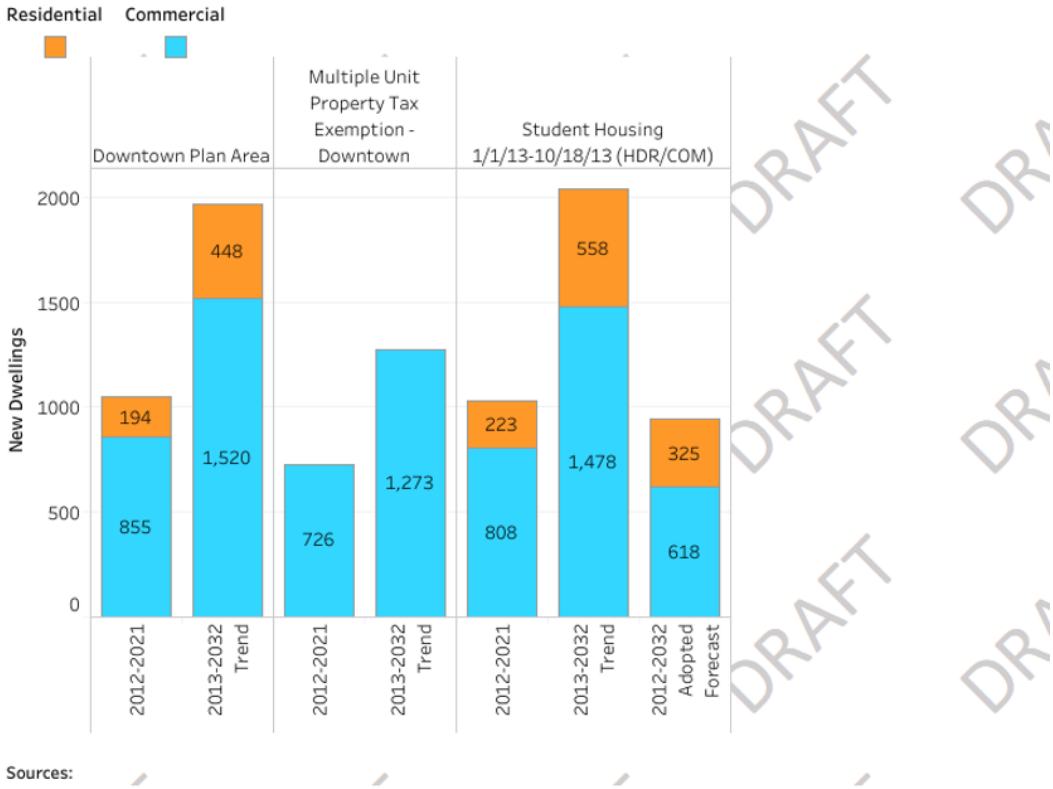
2012-2021: City of Eugene Planning and Development Department, building permits and Community Development databases
2013-2032 Trend: City of Eugene Planning and Development Department, building permits and Community Development databases
2012-2032 Adopted Forecast: City of Eugene Planning and Development Department

- The second chart for downtown efficiency measures breaks out the dwellings for each downtown incentive. Like in the earlier chart for affordable housing, LIRHPTE and re-designation, in this chart dwellings that received more than one downtown incentive are represented under *each* incentive and are not mutually exclusive.
  - For example, looking just at MUPTE, the new dwellings can be broken down further finding that out of the 726 new MUPTE dwellings over the monitoring period, 549 were also in the Student Housing 2013 efficiency measure (e.g., the first estimate of 943 dwellings which included the Capstone development). The remaining 177 MUPTE dwellings are from two 2019 projects (one on Ferry Street and one on Pearl Street/Gordon Lofts). The MUPTE program changed after 2012, including the qualifications for receiving a MUPTE and that student housing projects are no longer eligible. **This data means that since 2013, MUPTE has not**

been utilized very often (though not included in this report, it is noted that the Downtown Riverfront MUPTE application for 381 dwellings was submitted at the end of 2021):

Dwellings by Efficiency Measure and Plan Designation Category

Dwellings that received more than one incentive are represented under each incentive. Downtown programs estimate includes being in the downtown plan area or in the downtown or riverfront urban renewal areas. Some 2012 permits are included in the monitoring data because their development was not already clearly accounted for on the BLI. Trend calculations are for data from 2013 through the last complete review year 2020. R-2 and accessory dwelling efficiency measures analysis not included.



Sources:

2012-2021: City of Eugene Planning and Development Department, building permits and Community Development databases
2013-2032 Trend: City of Eugene Planning and Development Department, building permits and Community Development databases
2012-2032 Adopted Forecast: City of Eugene Planning and Development Department

- Urban Renewal is not shown as an individual category in the chart above because **at this time no new dwellings received specific Urban Renewal financial incentives. However, it is noted that several new dwellings have occurred within the urban renewal boundary over the monitoring period**, including the Hub/Core Campus (183 dwellings), 959 Franklin (230 dwellings) and 2125 Franklin (162 dwellings). These projects may have benefited from nearby development that received Urban Renewal incentives in the past.

Other development incentives not formally adopted as efficiency measures:

- The City also adopted credits for transportation systems development charges (SDC) for some types of housing.
    - New transportation **SDC credits for accessory dwellings** went into effect during the monitoring period, January 1, 2019, and is addressed above.
    - **SDC credits for affordable housing developments**. While credits towards a variety of SDCs were in effect for affordable housing before the beginning of the planning period, over the monitoring years (between 2013 and mid-2021[50]) 382 net new affordable housing dwellings have been awarded $1,928,912.05 in credit towards these permit charges.
    - New transportation **SDC credits for housing downtown, along key transit corridors and with proximity to frequent transit routes** went into effect during the monitoring period, January 1, 2019. Since their effective date and until mid-2021, 276 dwellings downtown and along key transit corridors (that were not accessory dwellings) received $55,108.25 in credit towards these permit charges. It's not certain how much development would have occurred without the incentive, but it has been successful in at least some way. To have a clearer conclusion would require more analysis; 2.5 years is not a lot of time, and much of that time has been during a pandemic.

Housing Development Details

The following charts focus on the net density of dwellings including group quarters, mostly from building permits.

- The net density achieved from each development with new housing is based on the total dwellings (existing dwellings – demolished/removed dwellings + new dwellings) on the development site divided by the total buildable acres of the development site in the same zone.
- The net density includes density from standard dwellings but also *includes* group quarters dwellings where the land use code requires a density calculation (nursing homes, assisted care, single-room occupancy housing, but not dormitories or jails).[51] This is different from most charts in this document where "new dwellings" refers *only* to standard dwellings and *excludes* group quarters.

[50] For consistency with other permit data in this report, SDC credits data was calculated from permits issued between 2013 and July 21, 2021. Three projects were excluded because the SDC credit amounts were not finalized as of the writing of this report.

[51] The equivalent dwellings and density from group quarters was included to the extent that the information was readily available. The majority of the group quarters permits that might warrant a density calculation did not have density calculated because for instance it was not required in the zone, the site was already developed, or the number of beds was less than the equivalent of a dwelling.

- For net density in these charts, the buildable acres are the tax lot acres excluding any portion of the lot categorized as Protected or Committed in the BLI (although categorized as Committed land, street right-of-way is already excluded from the tax lot acres by the time a building permit is submitted).[52] In some cases, the entire tax lot is Committed or Protected, such as a lot in public ownership (Committed) intended for low income housing or a historically designated lot (Protected), in those cases the entire tax lot acres are used in the net density calculation.
- Different from the annual averages discussed elsewhere in this report, the average net densities over the monitoring period are calculated by totaling the net density of each project and dividing that total by the number of new housing instances.[53] This is different from the annual averages discussed elsewhere in this report, the average net density is an average for all projects including those in partial data years rather than an annual average of only the full data years.
- It is important to note that **the methodology for collecting the net density during monitoring is significantly different from the methodologies used during the UGB analysis.** Therefore, it is difficult to fully compare the monitoring results to the adopted density assumptions or to the historical 2001-2012 densities. Going forward, density monitoring results will be more comparable to each other.

Average Net Density of Dwellings by Plan Designation

Overview: The total number of dwellings (including group quarters) per acre of buildable land for developments with new dwellings, on average in each BLI plan designation, over the monitoring period. The density is calculated for all the housing over the entire site: existing dwellings minus demolished/removed dwellings plus new dwellings. Includes percent difference between the actual density achieved and the forecast density.

Data Source: The net number of new dwellings permitted comes from the City of Eugene's Planning and Development Department land use and building permit data and the buildable lands inventory.

Relationship to UGB land supply and demand model: The average net density to assume for new housing in each plan designation is a **key direct input** into the land supply and demand model and are

[52] Net density is in comparison to gross density, which is calculated based on the number of dwellings per acre of land including any land that would be dedicated to right-of-way or in a protected area.

[53] The calculation for average net density over the monitoring period is slightly more complicated than stated above. First, the net density is calculated for the entire development site. The overall development site net density is attributed to each new housing use (e.g., multi-family 5-19 dwellings) on the site including, if applicable, each unique combination of housing use with the tax lot number and plan designation where the housing is occurring. The development site net density is totaled for each housing use. That net density total is then divided by the total number of instances for each unique combination of new housing, tax lot and plan designation, resulting in an average net density of all projects over the monitoring period.

adopted assumptions. For estimating the capacity of land for new housing, the net density for each plan designation is reduced to account for land needed for roads and utilities, resulting in a gross density assumption. The gross density assumption is applied to the buildable acres of the land supply resulting in an estimate of how many new dwellings (accounting for roads to serve those dwellings) on average could be accommodated on the land.

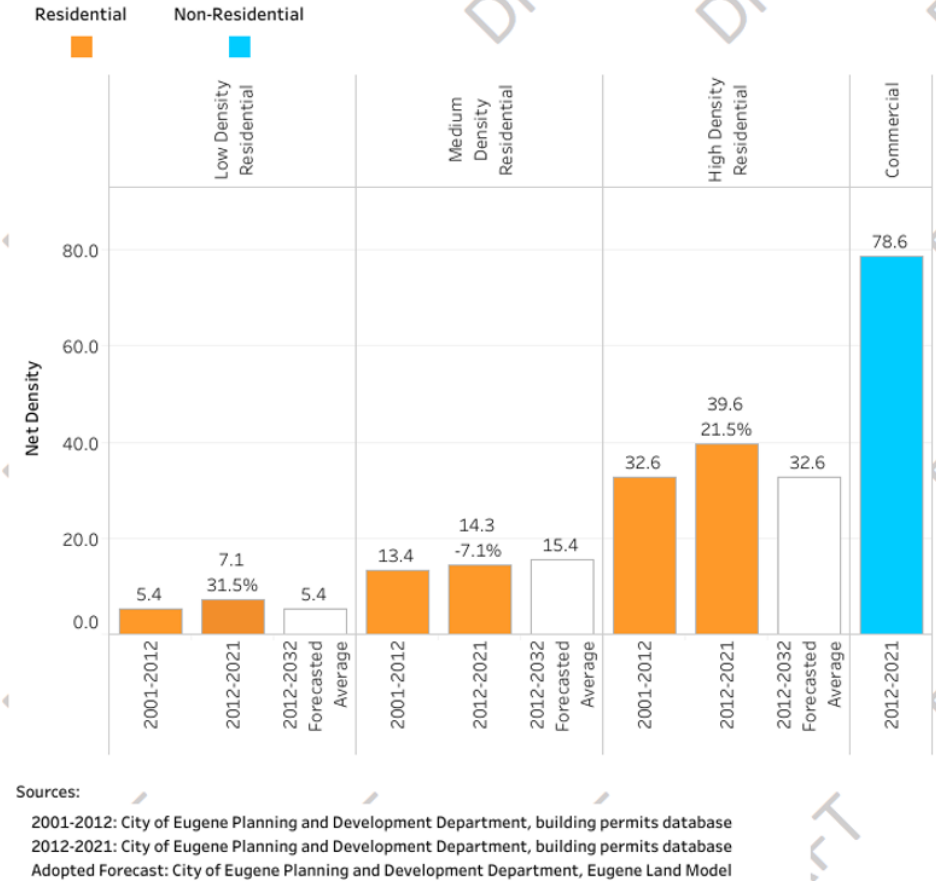
Takeaway: The net density of the 8,011 net new dwellings plus the 92 equivalent dwellings from group quarters is shown by residential and commercial type plan designations.[54] The chart shows the percent difference from the actual densities and the forecast densities, though because of the difference in density methodologies the exact amount of change is not as precise as it appears in the charts. While acknowledging the different methodologies, **on average, the net densities of Low Density Residential land and High Density Residential land are both higher than the historical densities (2001-2012)**. They are also both higher than the forecast density at 32% higher for Low Density Residential land and 21% higher for High Density Residential land. Comparatively, the net density on Medium Density Residential land is also higher than the historical average, but 7.1% lower than forecast. However, the Medium Density Residential land forecast incorporates the land use code amendment that raised the minimum net density required in the R-2 zone but since that code amendment did not take effect until 2017 most development over the monitoring period was likely approved under the previous (lower) minimum density. It will take more time to see the effects of that increase.

The UGB analysis did not adopt a net density for housing on Commercial land so only the actual net density experienced over the monitoring period is shown. However, the working assumption was that housing on Commercial land would be similar to that on High Density Residential land, in comparison over the monitoring period it has been substantially higher than density on High Density Residential land.

[54]Because of the small amount of housing, density on Parks and Open Space, Industrial, and Government & Education plan designations is excluded from this chart. Government & Education had a high average net density of 233.1, but only two projects made up 281 of the 283 new dwellings on this plan designation and one was a 230-unit 12-story building on Franklin Boulevard.

Average Net Density of Dwellings by Plan Designation

Includes difference between actual density and forecast density. The net density is calculated here as the number of dwellings (including group quarters) on buildable acres, excluding acres identified in the adopted BLI as protected or committed. There was no forecast for Commerical, Industrial, Government & Educations, or Parks and Open Space plan designations.



Sources:

2001-2012: City of Eugene Planning and Development Department, building permits database
2012-2021: City of Eugene Planning and Development Department, building permits database
Adopted Forecast: City of Eugene Planning and Development Department, Eugene Land Model

With the high demand for student-oriented housing during the monitoring period, there is interest in how multi-family development might be affected by a decrease or increase in demand for student-oriented housing in the future. When excluding projects identified as potentially student-oriented housing, the average net density of new housing developments of the monitoring period decreases on land designated as High Density Residential from 39.6 to 26.8 dwellings per acre and on Commercial from 78.6 to 31.4 dwellings per acre. Students are part of Eugene's population; therefore, their housing needs are included as part of the UGB housing needs analysis and this data is not intended to imply otherwise.

Additionally, during the next UGB analysis, if the number of students at the University of Oregon continues to hold steady, it will need to be considered whether housing demand will be the same in terms of number, type and densities of new units.

Average Net Density by Land Characteristics, by Period

Overview: The total number of dwellings (including group quarters) per acre of buildable land for developments with new dwellings, according to the characteristics (or "density factors") of the land developed, on average over the monitoring period. Includes percent difference from forecast (noted in green for at or above forecast, red for below forecast) and the number of dwellings in each characteristic combination. The BLI assigns a lot its own combination of characteristics based on the comprehensive plan designation, elevation, slope and site size. In limited instances, the lot configuration at the time of building permit includes more than one lot with different characteristic combinations than at the time of the BLI. In those cases, the density was attributed to the lot (and therefore its characteristics combination) with the largest buildable acres.

Data Source: Same as *Average Net Density of Dwellings by Plan Designation*.

Relationship to UGB land supply and demand model: The average net density to assume for new housing by plan designation is further broken down based on the characteristics of the land and is a **direct input** into the land supply and demand model and are adopted assumptions. This is the same as *Average Net Density of Dwellings by Plan Designation*, except average net density is further broken down by not only the plan designation of the land but also the other characteristics of the site including low or high elevation (collapsed into above or below 900'), flat or sloped land (collapsed into above or below 5%) and the small, medium or large size of the site (less than 1 acre, 1-5 acres, or 5+ acres), excluding Committed and Protected acres.

Takeaway: **Over the monitoring period, new dwellings (including group quarters) have overwhelmingly (92% or 7,686 dwellings) been on flat land in all plan designations**. In many of the land characteristic combinations the net density achieved is higher than the forecast. For Low and Medium Density Residential lands, where the net density achieved is less dense than the forecast, there were very few new dwellings (primarily on higher elevation, any slope, any size) to get an average from. On the other hand, these types of lands also had the lowest forecast in general for new housing to begin with.

- Low Density Residential Land- Generally denser than the forecast. New housing has overwhelmingly been on low/flat (e.g., below 900' elevation/less than 5% slope) land where densities were between 26% and 46% above the forecast. About 257 new dwellings were on low/sloped/small lots, where the net density was double the forecast density. There were 80 dwellings on sloped lots over 900' elevation that were notably above the forecast density average, however, these were almost entirely from one large planned unit development approval, Timberline Hills PUD (which was one of the PUDs reviewed when developing the forecast densities).

Average Net Density by Land Characteristics

The net density is calculated here on Vacant, Partially Vacant and Developed lots as the number of dwellings (including group quarters) on buildable acres, excluding acres identified in the adopted BLI as protected or committed. For lots identified in the adopted BLI as entirely Protected or Committed, the net density is calculated on the entire lot.

Plan Designation Category	BLI Elevation	BLI Slope	BLI Size	2001-2012 Avg Net BLI Density	2012-2021 Avg Net BLI Density	2012-2032 Forecast Avg Net BLI Density	2012-2021 Percent Difference From Forecast	2012-2021 Net New Dwellings
Low Density Residential	< 900'	< 5%	< 1 ac	5.4	7.9	5.4	46.3%	770
			1-5 ac	5.4	7.2	5.4	33.3%	433
			5+ ac	5.4	6.8	5.4	25.9%	988
		>= 5%	< 1 ac	3.2	6.4	3.2	100.0%	257
			1-5 ac	3.2	4.7	3.2	46.9%	33
			5+ ac	3.2	not enough data	3.2	not enough data	1
	>= 900'	< 5%	< 1 ac	3.2	not enough data	3.2	not enough data	0
			1-5 ac	3.2	not enough data	3.2	not enough data	0
			5+ ac	3.2	not enough data	3.2	not enough data	0
		>= 5%	< 1 ac	3.2	5.4	3.2	68.8%	48
			1-5 ac	3.2	not enough data	3.2	not enough data	4
			5+ ac	3.2	4.4	3.2	37.5%	32

- Medium Density Residential Land- In most land characteristic combinations, net density is generally higher than the historical average but lower than the forecast average. This makes sense because the changes to increase the R-2 minimum density did not go into effect until 2017 which is about halfway into the monitoring period. A notable exception is a decrease in density on flat / large lots where new housing developments averaged a density of 10.7 dwellings per net acre. Like Low Density Residential land, new housing has overwhelmingly been on flat land.

Plan Designation Category	BLI Elevation	BLI Slope	BLI Size	2001-2012 Avg Net BLI Density	2012-2021 Avg Net BLI Density	2012-2032 Forecast Avg Net BLI Density	2012-2021 Percent Difference From Forecast	2012-2021 Net New Dwellings
Medium Density Residential	Any	< 5%	< 1 ac	13.4	17.4	15.4	13.0%	434.0
			1-5 ac	13.4	13.8	15.4	-10.4%	552.0
			5+ ac	13.4	10.7	15.4	-30.5%	540.0
		>= 5%	< 1 ac	12.5	14.4	12.5	15.2%	33.0
			1-5 ac	12.5	not enough data	12.5	not enough data	0.0
			5+ ac	12.5	not enough data	12.5	not enough data	0.0

- High Density Residential Land- Almost 4,000 (about half) of new dwellings (including group quarters) have been on High Density Residential and Commercial lands combined. The net density on High Density Residential land was highest on small lots, achieving 32% higher than the forecast. But on flat, medium and large lots housing achieved lower density than the forecast.

Plan Designation Category	BLI Elevation	BLI Slope	BLI Size	2001-2012 Avg Net BLI Density	2012-2021 Avg Net BLI Density	2012-2032 Forecast Avg Net BLI Density	2012-2021 Percent Difference From Forecast	2012-2021 Net New Dwellings
High Density Residential	Any	< 5%	< 1 ac	32.6	43.0	32.6	31.9%	528
			1-5 ac	32.6	23.8	32.6	-27.0%	141
			5+ ac	32.6	26.9	32.6	-17.5%	965
		>= 5%	< 1 ac	32.6	not enough data	32.6	not enough data	9
			1-5 ac	32.6	not enough data	32.6	not enough data	0
			5+ ac	32.6	not enough data	32.6	not enough data	0

- Commercial Land- There is no Adopted Forecast for density on Commercial land, but it has been significantly higher than on High Density Residential flat/small lots.

Plan Designation Category	BLI Elevation	BLI Slope	BLI Size	2001-2012 Avg Net BLI Density	2012-2021 Avg Net BLI Density	2012-2032 Forecast Avg Net BLI Density	2012-2021 Percent Difference From Forecast	2012-2021 Net New Dwellings
Commercial	Any	< 5%	< 1 ac	0.0	100.7	0.0	0.0%	1,586
			1-5 ac	0.0	34.3	0.0	0.0%	487
			5+ ac	0.0	13.9	0.0	0.0%	114
		>= 5%	< 1 ac	0.0	25.9	0.0	0.0%	133
			1-5 ac	0.0	0.0	0.0	0.0%	0
			5+ ac	0.0	0.0	0.0	0.0%	0

Annual Average Net Density of Dwellings by Housing Subcategory

Overview: The total number of dwellings (including group quarters) per acre of buildable land for developments with new housing, by the housing (structure) type of new dwellings, on average over the monitoring period. The density is calculated for all housing over the entire site, the same as in *Average Net Density of Dwellings by Plan Designation* but is then attributed to the type of new housing.

Data Source: Same as *Average Net Density of Dwellings by Plan Designation*.

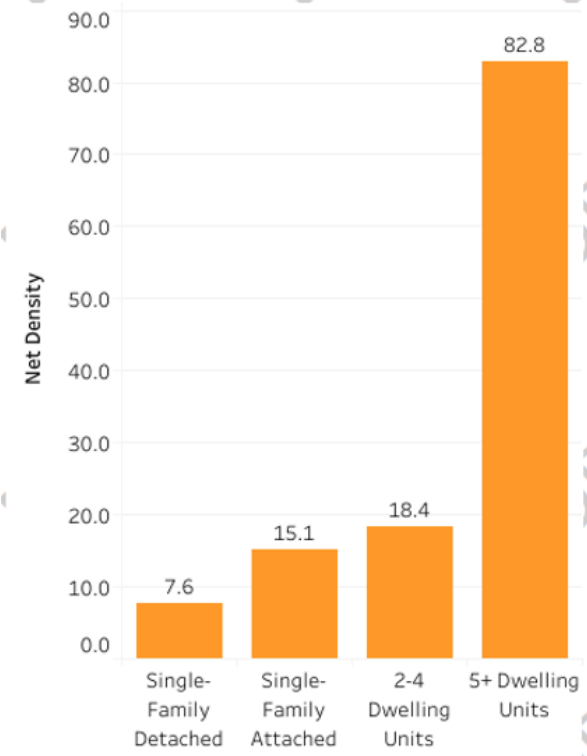
Relationship to UGB land supply and demand model: The average net density by housing type was *not* a direct input into the land supply and demand model and is not an adopted assumption. However, it provides context for how the estimated capacity of land might be affected if there is more or less of a certain housing type developing than anticipated or how the estimated capacity of land might be affected if policy changes make it easier or harder to develop certain housing types.

Takeaway: Over the monitoring period, the average net density of new 5+ dwelling housing types is significantly higher than the other housing types.[55]

[55] The net density for housing subcategory "other multi-family" is not show in this chart because of the small amount of new housing, which was six equivalent single-room occupancy dwellings at 26.1 average net density. The net density for

Average Net Density of Dwellings by Housing Subcategory 2012-2021

The net density is calculated here as the number of dwellings (including group quarters) on buildable acres, excluding acres identified in the adopted BLI as protected, committed or existing development.



Source:
City of Eugene Planning and Development Department, building permits database

As mentioned above, to provide context for how future multi-family housing development could change with a change in student-oriented housing demand, when excluding projects identified as potentially student- oriented housing, the average net density decreases for new 2-4 dwelling housing types from 18.4 to 17.8 dwellings per acre and for 5+ dwelling housing types from 82.8 to 44.7 dwellings per acre.

group quarters (21) is also excluded from the chart because as previously mentioned the majority of group quarters that might have warranted a density calculation were not included in the calculation for various reasons, so the sample size may not be representative.

Average Net Density of Dwellings by BLI Category

Overview: The total number of dwellings (including group quarters) per acre of buildable land for developments with new housing, on average in each BLI category, over the monitoring period. The density is calculated for the entire site the same as in *Average Net Density of Dwellings by Plan Designation* but is then attributed to the BLI land category where the new housing is occurring.

Data Source: Same as *Average Net Density of Dwellings by Plan Designation* above.

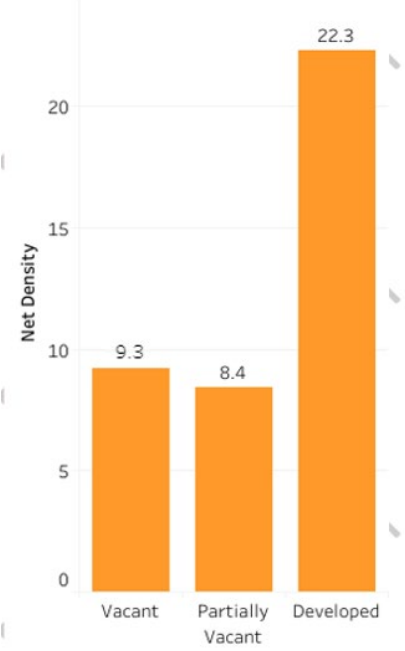
Relationship to UGB land supply and demand model: The average net density of dwellings by BLI category is *not* a direct input into the land supply and demand model and is not an adopted assumption. However, the land model did calculate the average gross density for vacant land (prior to any land used for or affected by efficiency measures) resulting from the adopted land supply and capacity assumptions.

Takeaway: Over the monitoring period, **new housing and group quarters on Developed land achieved a higher net density than on Vacant and Partially Vacant land**.[56] This is likely in part because more than half of the new dwellings on Developed land have been on Commercial land, and 97% of the new housing on Commercial land has been 5+ dwelling types which had the highest density. Additionally, the majority of dwellings on Vacant and Partially Vacant land have been on Low Density Residential land which has a much lower average net density than Commercial land.

[56] Net density on Protected (12.9) and Committed (14.2) land are excluded from this chart because of the small amount of new housing.

Average Net Density of Dwellings by BLI Category 2012-2021

The net density is calculated here on Vacant, Partially Vacant and Developed lots as the number of dwellings (including group quarters) on buildable acres, excluding acres identified in the adopted BLI as protected or committed. For lots identified in the adopted BLI as entirely Protected or Committed, the net density is calculated on the entire lot.



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Source:
City of Eugene Planning and Development Department, building permits database

Excluding projects identified as potentially student- oriented housing, the average net density of new housing developments decreases on Vacant land from 9.3 to 8.4 dwellings per acre and on Developed land from 22.3 to 12.4 dwellings per acre.

Housing Development Buildable Lands Impact

Dwellings by BLI Category and Plan Designation

Overview: The total number of net new dwellings (excluding group quarters) permitted over the monitoring period within each of the land categories in the buildable lands inventory (BLI). The BLI categorizes all land in the UGB by its development potential: Vacant, Partially Vacant, Developed, Committed or Protected. Each BLI category is further divided by how many of the new dwellings are within each plan designation.

Data Source: Same as *Average Acres Developed by BLI Category and Plan Designation*.

Relationship to UGB land supply and demand model: The number of dwellings that each BLI category of the land supply is assumed to accommodate for new housing development is a **direct input** into the

land supply and demand model and are adopted assumptions. The adopted estimated capacity is categorized by the development potential (Vacant, Partially Vacant, Developed, Committed, or Protected) and assumed comprehensive plan designation of the land as provided in the adopted buildable lands inventory.

Takeaway: Over the monitoring period (2012-2021), **the total number of net new dwellings has been close to evenly split with 41% (3,281 dwellings) on Developed land and 54% (4,331 dwellings) on Vacant and Partially Vacant, which is different than the forecast for 23% of new dwellings on Developed and 77% on Vacant and Partially Vacant**. About 380 new dwellings occurred on Committed land which was mostly either owned by the City but subsequently developed for affordable housing or owned by a different public entity and subsequently sold and developed with housing. New Dwellings on Committed or Protected land, or on Parks and Open Space or Industrial designated land, are included in the first chart below to show the total number of new dwellings but are omitted from the second chart detailed chart due to the small amount of new housing in these categories.

In gross numbers, new housing developed land faster on Commercial or High Density Residential land (Vacant, Partially Vacant and Developed) and if the trend continues would more than triple their forecast amounts by 2032. In comparison, new housing has developed slower on Vacant and Partially Vacant Medium Density and Low Density Residential land, and if the trend continues to 2032 housing on Medium Density land would just meet the forecast amount (but only if new housing on Developed land continues at its elevated pace) and housing on Low Density land would meet 68% of the forecast. When looking at specific BLI categories and plan designations some forecasts would not be met:

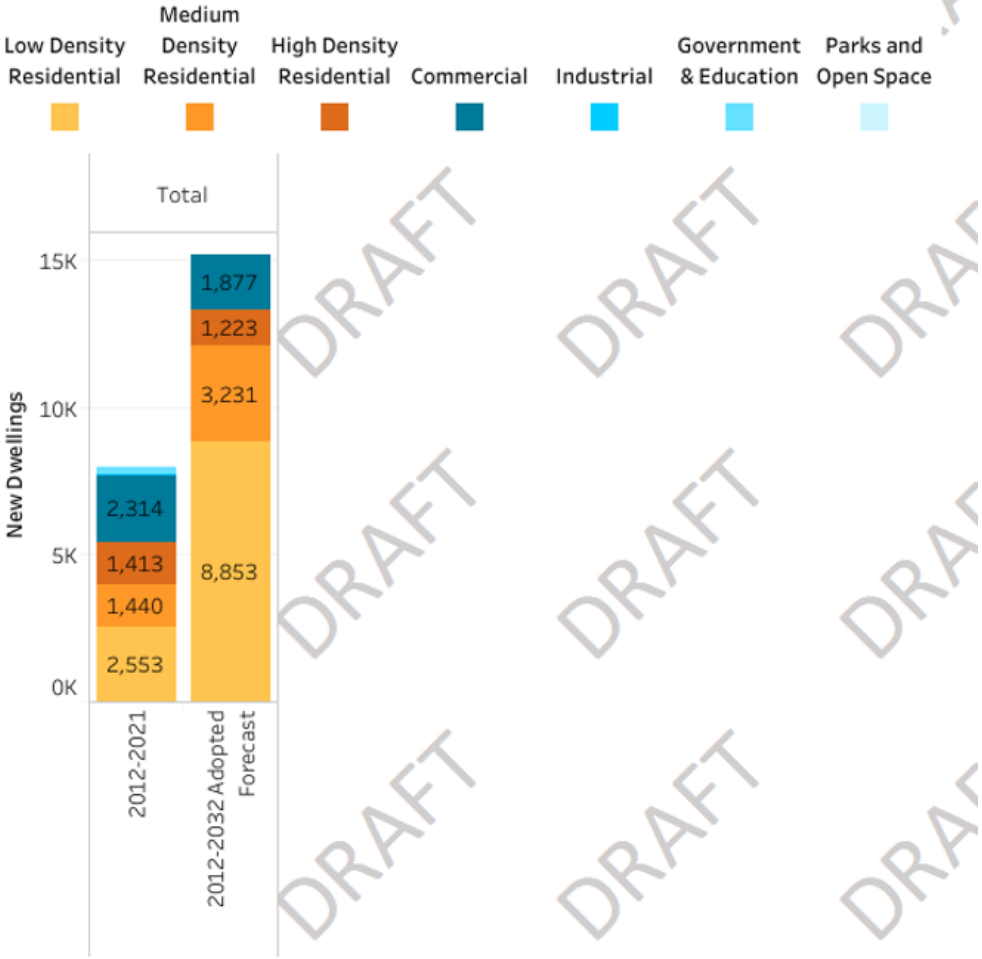
- Vacant land- Total new dwellings on Vacant land is on pace to meet the Adopted Forecast but only when looking at the total number of dwellings. When breaking the new dwellings down by plan designation the forecast for Vacant land would not be met on all plan designations.
    - A small number of dwellings was forecast for Vacant High Density Residential land (103) and Vacant Commercial land (zero) but there have been 943 new dwellings between the two, although new dwellings are significantly higher than forecast on these lands there is very little Vacant High Density Residential or Vacant Commercial land in the 2021 BLI to allow that trend to continue.
    - In comparison, dwellings on Vacant Low Density Residential and Medium Density Residential land are below the forecast pace with about 27% and 31% of the forecast met, respectively.
- Partially Vacant land – Total new dwellings on Partially Vacant land are developing slower than needed to meet the forecast. Similar to Vacant land, new dwellings on Partially Vacant High Density Residential land are above pace at 85% of the forecast met, but Low and Medium Density Residential land are below pace with about 23% and 30% of the forecast met, respectively.

- Developed land – Total new dwellings (3,281) on **Developed land is on pace to significantly exceed the forecast** as noted above.[57] About half of the new dwellings on Developed land are on Commercial Developed land (1,590) which is already 85% of the forecast. New dwellings on Developed Medium Density Residential land are almost 200% more than the forecast (424 dwellings out of 220 forecast) and the 532 new dwellings on High Density Residential Developed land meet 94% of the forecast. However, new dwellings on Developed land for *all* residential plan designations has met or almost met the forecast amount. Most (87%) new housing on Developed land is multi-family housing.

[57] Further review of a sample of the small (0.5 acres in size or less) Developed lots with new single-family indicates that many of the lots were correctly identified as Developed at the time of the BLI; they were part of a lot that has since completed a small land division, they were in a larger manufactured home park, or were already developed but added an ADU. In some cases, it was not clear why the lot was classified as Developed at the time of the BLI, it could be that there was an existing structure that is currently not visible from aerial photos or it could have been an error due to a lag in data.

Dwellings by BLI Category and Plan Designation

2012 permits were included in monitoring years only if not already clearly accounted for in the BLI.
Trend calculations are for data from 2013 through the last complete review year 2020.



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Sources:

2012-2021: City of Eugene Planning and Development Department, building permits database
Adopted Forecast: City of Eugene Planning and Development Department, Eugene Land Model

Dwellings by BLI Category and Plan Designation

2012 permits were included in monitoring years only if not already clearly accounted for in the BLI.
Trend calculations are for data from 2013 through the last complete review year 2020.

Sources:
2012-2021: City of Eugene Planning and Development Department, building permits database
2013-2032 Trend: City of Eugene Planning and Development Department, building permits database
Adopted Forecast: City of Eugene Planning and Development Department, Eugene Land Model

Average Acres Developed by BLI Category and Plan Designation

Overview: The acres "developed"[58] with new housing developments,[59] annually on average, permitted over the monitoring period within each BLI plan designation. The acres developed in each plan designation is then further divided by the amount developed within each BLI land category. The

[58] These estimates are an approximation and are only used for the purposes of estimating how much of the adopted land supply has been developed. For instance, lots under 0.5 acre in size were not manually reviewed for BLI impacts so these estimates include the entirety of each small lot as developing even if only a portion of the lot was impacted. These estimates do not replace the more accurate status of the land supply that comes from re-running the BLI model. In addition, these estimates are from building permits that have been issued and do not represent final construction or occupancy certification.

[59] For mixed use buildings, the BLI impact is attributed to the dominate use of the building unless easily divisible between each use (e.g., each use takes up a clear portion of the building/development site, or the building is divided vertically between uses).

average is derived from full year data only (2012 and 2021 are excluded from the calculation). The acres developed attempts to account for all portions of the new residential development including new dwellings, parking, landscaping and open space, and accessory buildings and uses.

Data Source: Data from the monitoring years, 2012-2021, came from the City of Eugene's Planning and Development Department land use and building permits database.

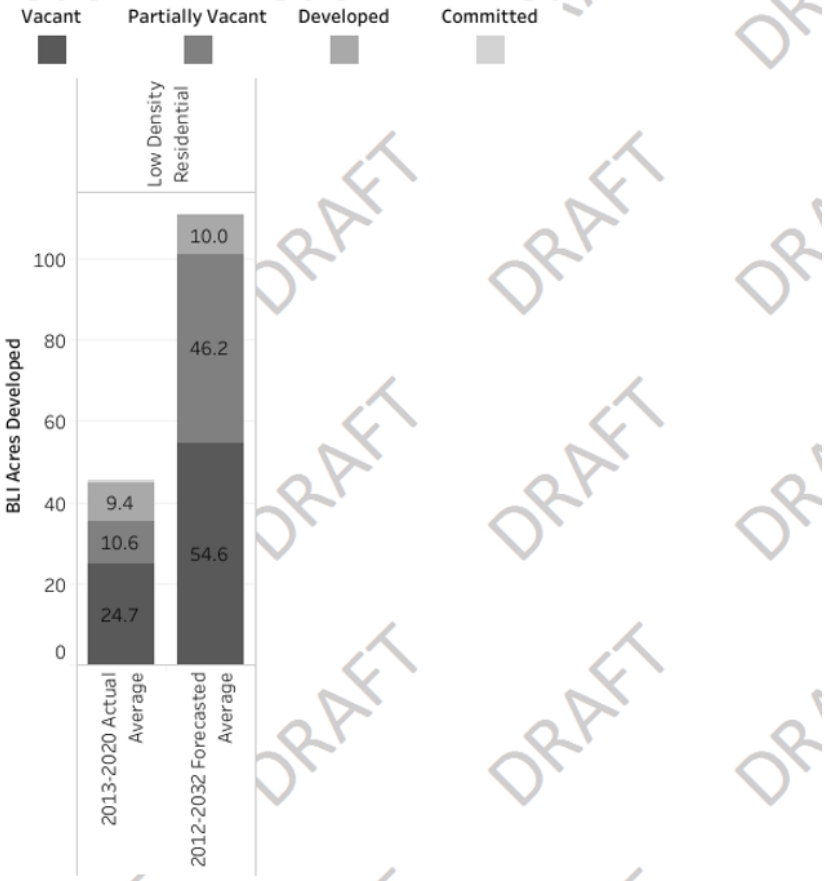
Relationship to UGB land supply and demand model: The number of acres in the land supply available for new housing development, is a **key direct input** into the land supply and demand model and are adopted assumptions. The adopted estimated capacity is categorized by the development potential (Vacant, Partially Vacant, Developed, Committed, and no capacity was assumed on Protected) and assumed comprehensive plan designation of the land as provided in the adopted buildable lands inventory. The average number of acres developed is *not* a direct input into the land supply and demand model but is helpful to understand whether development is on pace to meet the housing needs by 2032.

Takeaway: For 2013-2020, **the total annual average number of acres developed with dwellings per year[60] is on pace or exceeding the projected total average for High Density Residential and Commercial land, compared to Low Density Residential and Medium Density Residential land which are well below the pace of the projected total average**. However, although Medium Density Residential land developed below the forecast pace, the number of new dwellings is on pace to meet the need, as previously discussed. This could be because housing on Medium Density Residential land is developing more densely than it has historically (although still not as dense as the forecast). Low Density Residential land is shown on a separate chart because the number of acres on average is significantly higher than in the other plan designations.

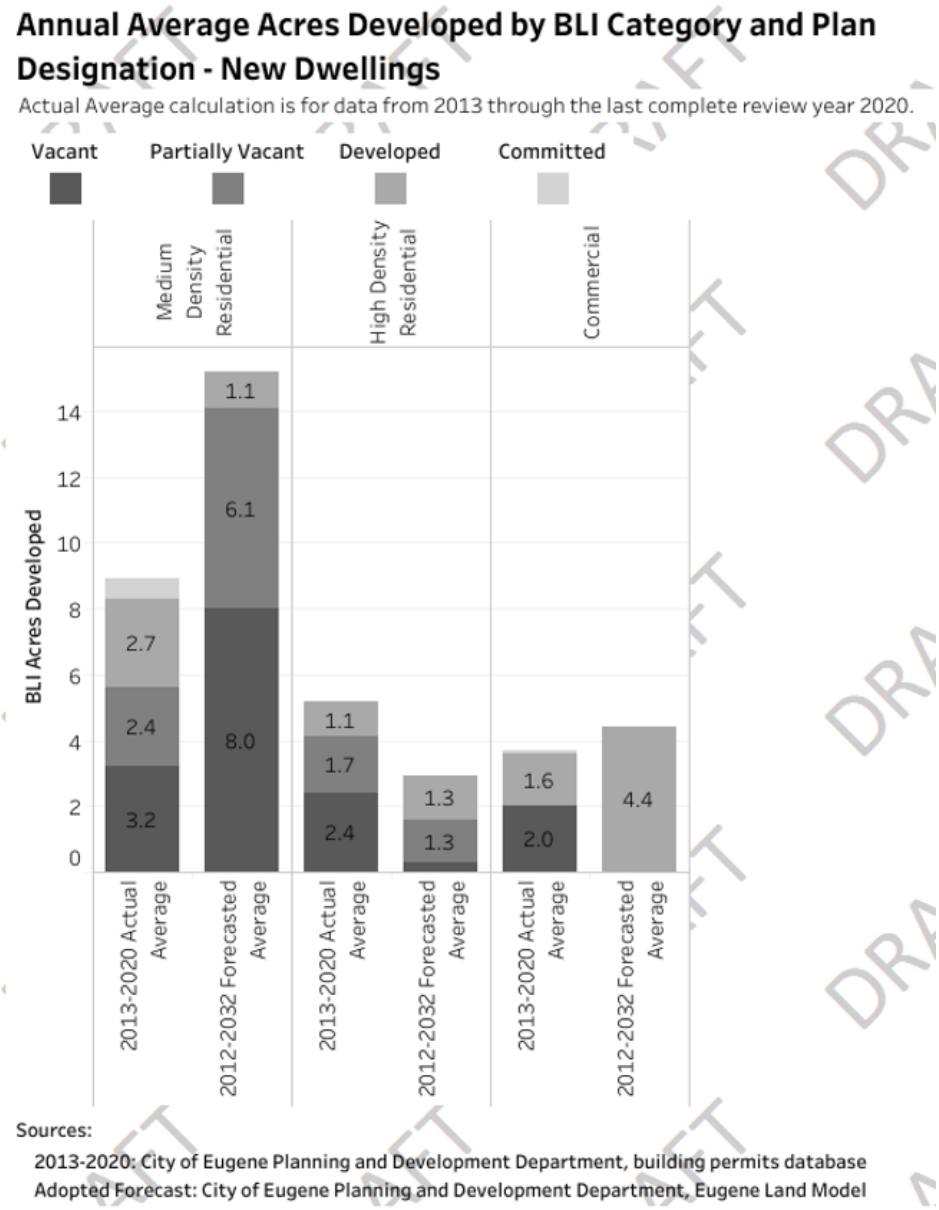
[60] A small number of new dwellings are on plan designations or BLI categories not shown in the Annual Average Acres Developed by BLI Category and Plan Designation charts because their amount of impact is very small. These include new dwellings in Parks and Open Space designations (5 dwellings) or Industrial designations (3 dwellings) and dwellings on lots identified as fully Protected in any plan designation (18 dwellings). Government & Education land is also not shown on this chart because there were 0 average acres developed, this is because there has only been a *total* of 1.5 acres developed, albeit with 283 dwellings.

Annual Average Acres Developed by BLI Category and Plan Designation - New Dwellings

Actual Average calculation is for data from 2013 through the last complete review year 2020.



Sources:
2013-2020: City of Eugene Planning and Development Department, building permits database
Adopted Forecast: City of Eugene Planning and Development Department, Eugene Land Model



Acres Developed by BLI Category and Plan Designation with Percent of Need Met

Overview: The total acres developed of new housing developments permitted over the monitoring period within each BLI development potential category. Each BLI category is further divided by how many acres are on land that is a residential type of plan designation versus the non-residential types.

Additional charts detail the acres developed in each plan designation, broken down by BLI category with the remaining acres needed to develop to meet the forecast. The remaining need is shown as the number of acres developed with new dwellings over the monitoring period, the percentage of the forecast met so far, and the amount left to accommodate during the remainder of the 2012-2032

period. Bars with no percentage indicated means there is no Adopted Forecast for that combination of BLI plan designation and BLI category.

Data Source: Same as *Average Acres Developed by BLI Category and Plan Designation*.

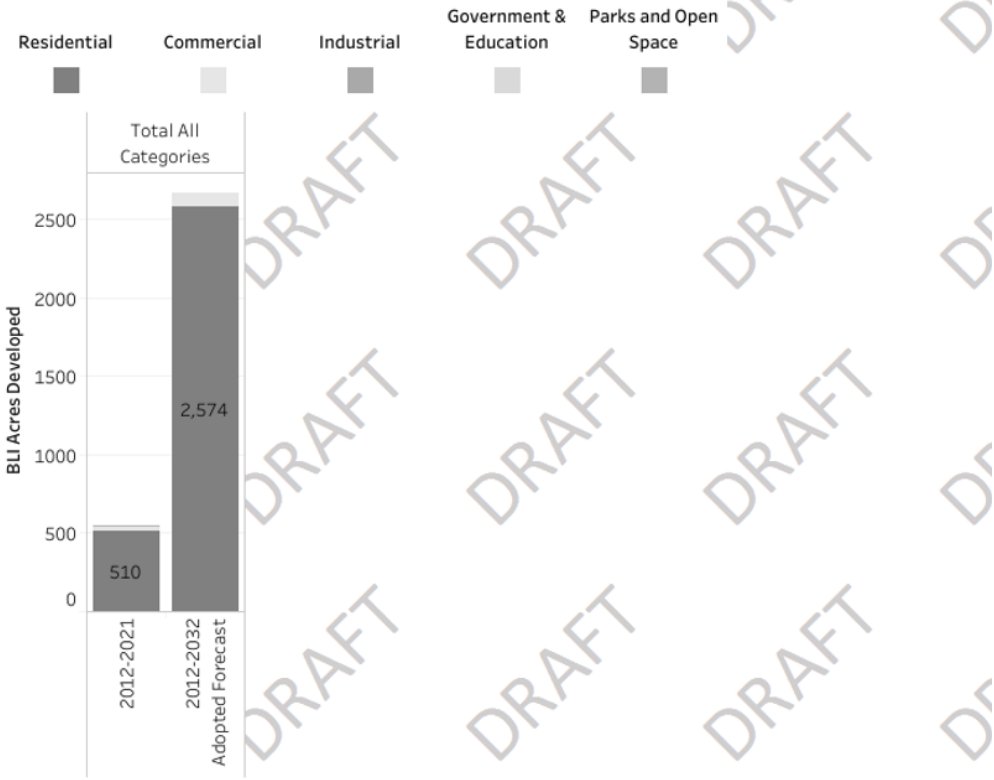
Relationship to UGB land supply and demand model: The number of acres in the land supply available for new housing development is a **direct input** into the land supply and demand model and are adopted assumptions. The adopted estimated capacity is categorized by the development potential (Vacant, Partially Vacant, Developed, Committed, or Protected) and assumed comprehensive plan designation of the land as provided in the adopted buildable lands inventory.

Takeaway: The 548 acres developed with new housing over the monitoring period, shown in the first chart, has been overwhelmingly Vacant or Partially Vacant land (73%) shown in the second chart.[61] The total acres developed has also been overwhelmingly in residential designations (93%, 510 acres) compared to commercial designations (6%, 33 acres). However only 67% of new dwellings are on residential plan designations (5,406) compared to 29% on commercial (2,314) plan designations. Or put another way, **510 residential acres were developed with 5,406 dwellings compared to 33 commercial acres developed with 2,314 dwellings**. This is supported by the fact that 97% of the new dwellings on Commercial land were 5+ dwelling types, these housing types have an average net density of 82.8 and Commercial land has experienced an average net density of 78.6, significantly higher than other plan designations (see above *Percentage of Dwellings by Housing Mix Subcategory and BLI Plan Designation* and *Average Net Density of Dwellings by Housing Subcategory)*.

[61] Development of Committed or Protected land or on plan designations Government & Education, Industrial or Parks and Open Space are excluded from these charts because of the small amount.

Acres Developed by BLI Category and Plan Designation - New Dwellings

Trend calculation is for data from 2013 through the last complete review year 2020.

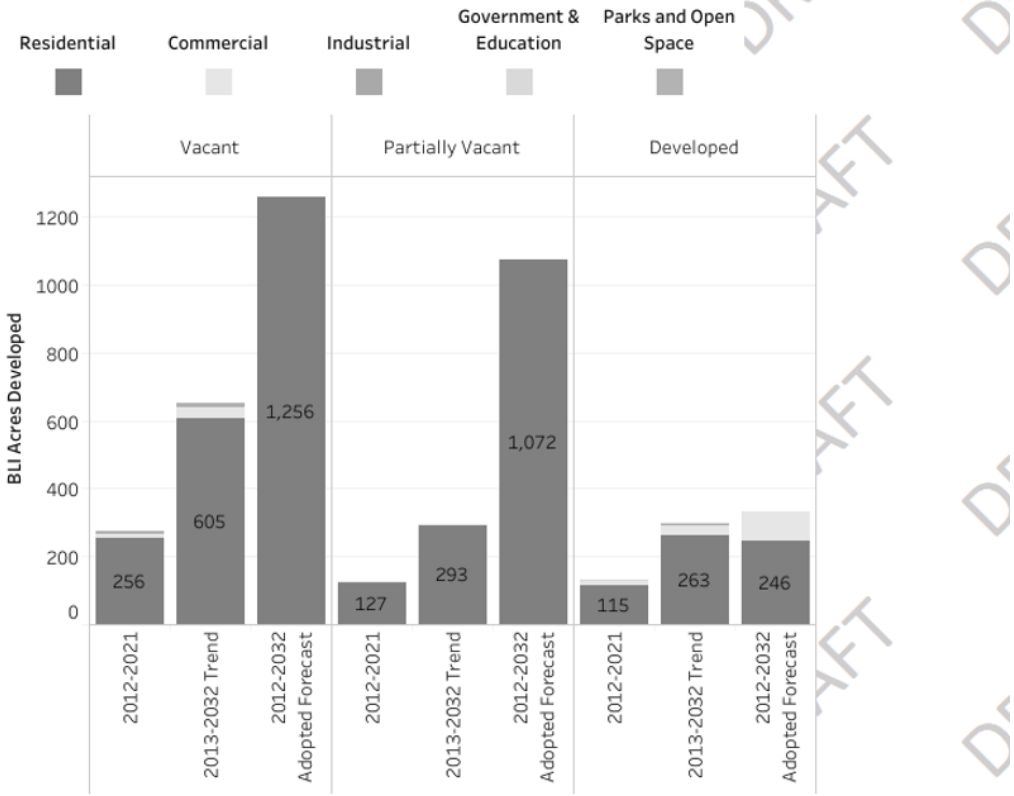


Sources:

2012-2021: City of Eugene Planning and Development Department, building permits database. 2012 permits were included in monitoring years only if not already clearly accounted for in the BLI.
Adopted Forecast: City of Eugene Planning and Development Department, Eugene Land Model

Acres Developed by BLI Category and Plan Designation - New Dwellings

Trend calculation is for data from 2013 through the last complete review year 2020.



Sources:

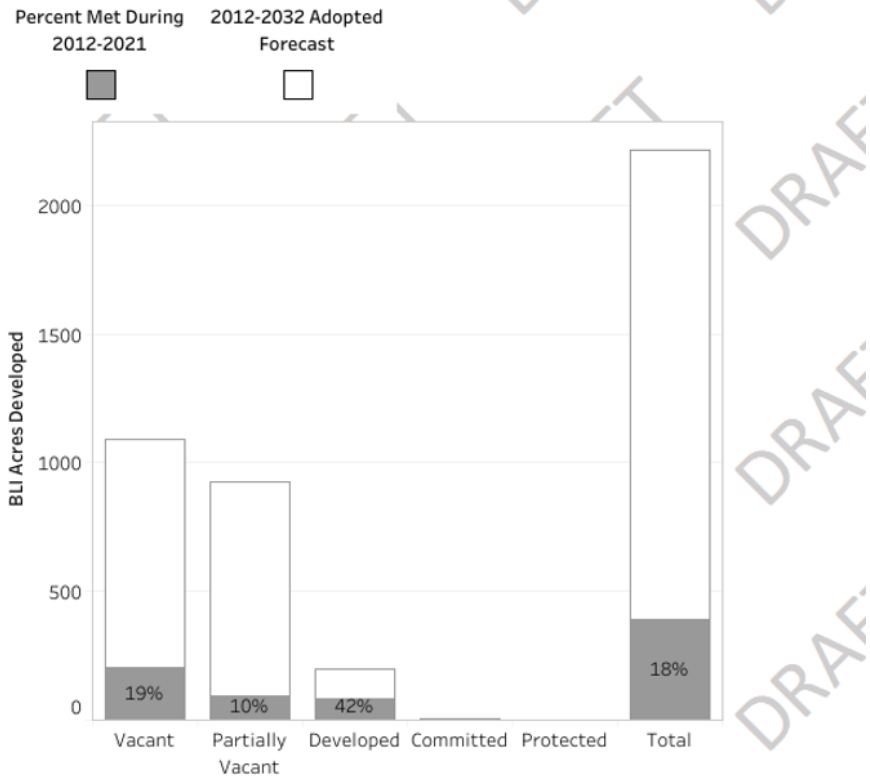
2012-2021: City of Eugene Planning and Development Department, building permits database. 2012 permits were included in monitoring years only if not already clearly accounted for in the BLI.
2013-2032 Trend: City of Eugene Planning and Development Department, building permits database
Adopted Forecast: City of Eugene Planning and Development Department, Eugene Land Model

The following charts show the breakout of acres developed by plan designation and what percent of the forecast need in each plan designation has been met.

- New housing developed about 391 acres of **Low Density Residential land** (18% of forecast) and 77 acres of **Medium Density Residential land** (27% of forecast):

Acres Developed by BLI Category and Percent of Need Met - New Dwellings: Low Density Residential

2012 permits were included in monitoring years only if not already clearly accounted for in the BLI.

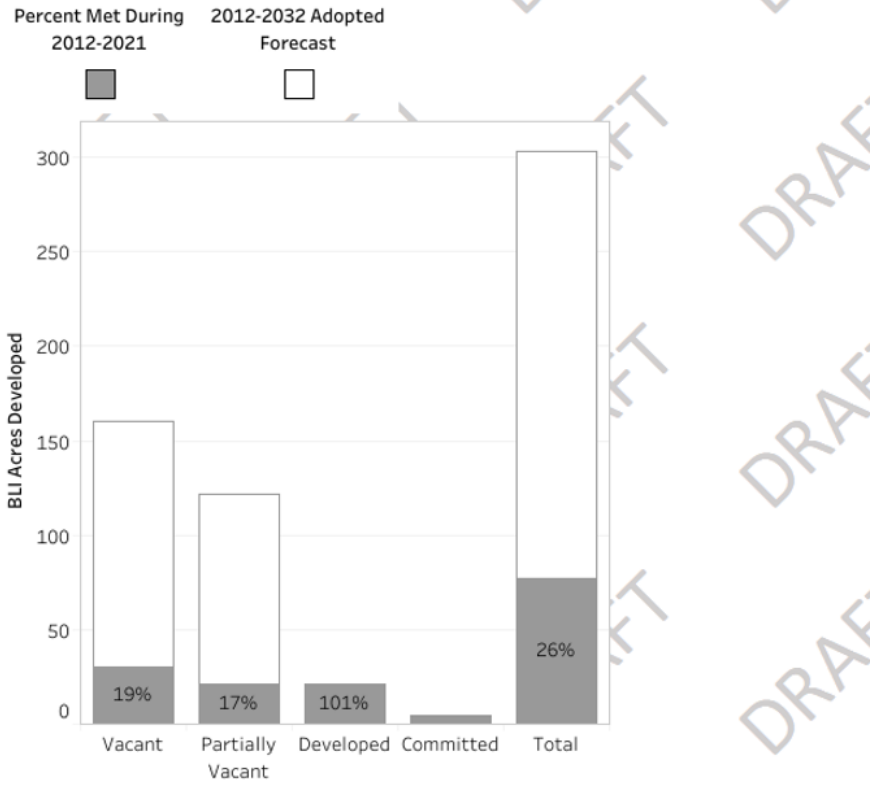


Sources:

Historical data: City of Eugene Planning and Development Department, building permits database
2012 permits were included in monitoring years only if not already clearly accounted for in the BLI.
Forecast data: City of Eugene Planning and Development Department, Eugene Land Model

Acres Developed by BLI Category and Percent of Need Met - New Dwellings: Medium Density Residential

2012 permits were included in monitoring years only if not already clearly accounted for in the BLI.



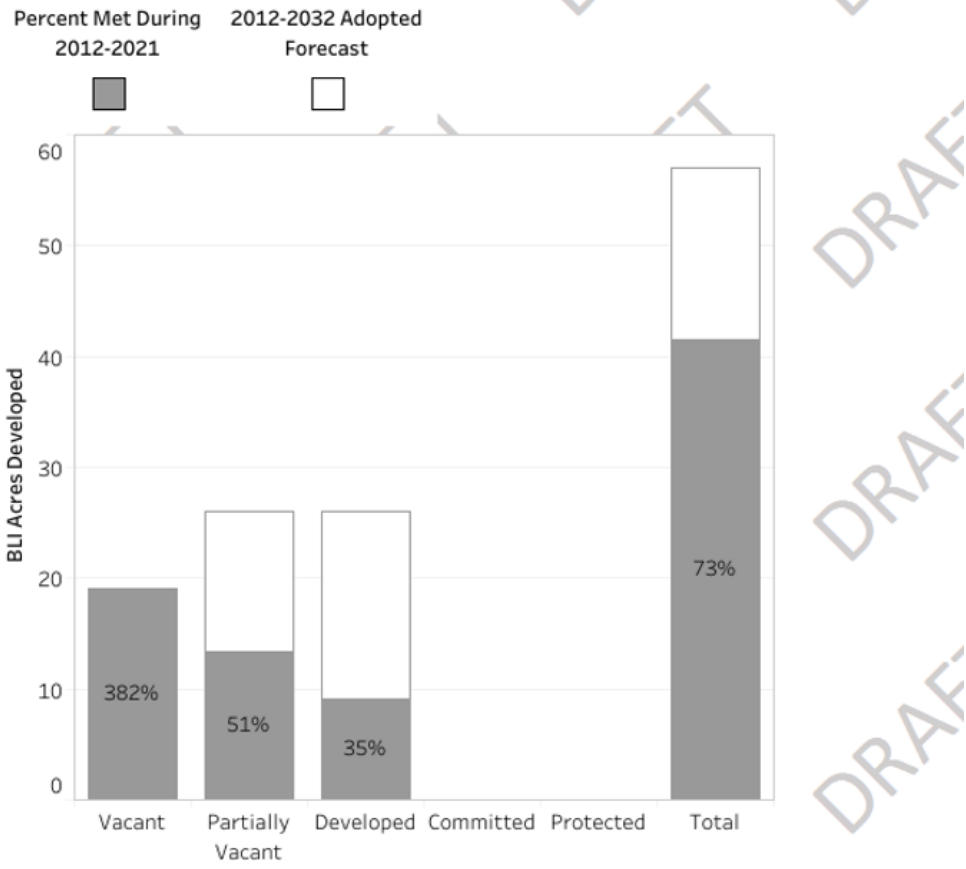
Sources:

Historical data: City of Eugene Planning and Development Department, building permits database
2012 permits were included in monitoring years only if not already clearly accounted for in the BLI.
Forecast data: City of Eugene Planning and Development Department, Eugene Land Model

- New housing developed 41.5 acres of **High Density Residential land** (73% of forecast). The acres of Vacant High Density Residential land developed well beyond the amount forecast. This is because the adopted BLI identified 32 Vacant High Density acres but the Adopted Forecast assumes only five of those acres would be for dwellings and the rest developed with other uses (group quarters, employment, utilities). In fact, 19 acres of Vacant High Density Residential land have been developed with new dwellings, which is over 380% compared to the forecast.

Acres Developed by BLI Category and Percent of Need Met - New Dwellings: High Density Residential

2012 permits were included in monitoring years only if not already clearly accounted for in the BLI.



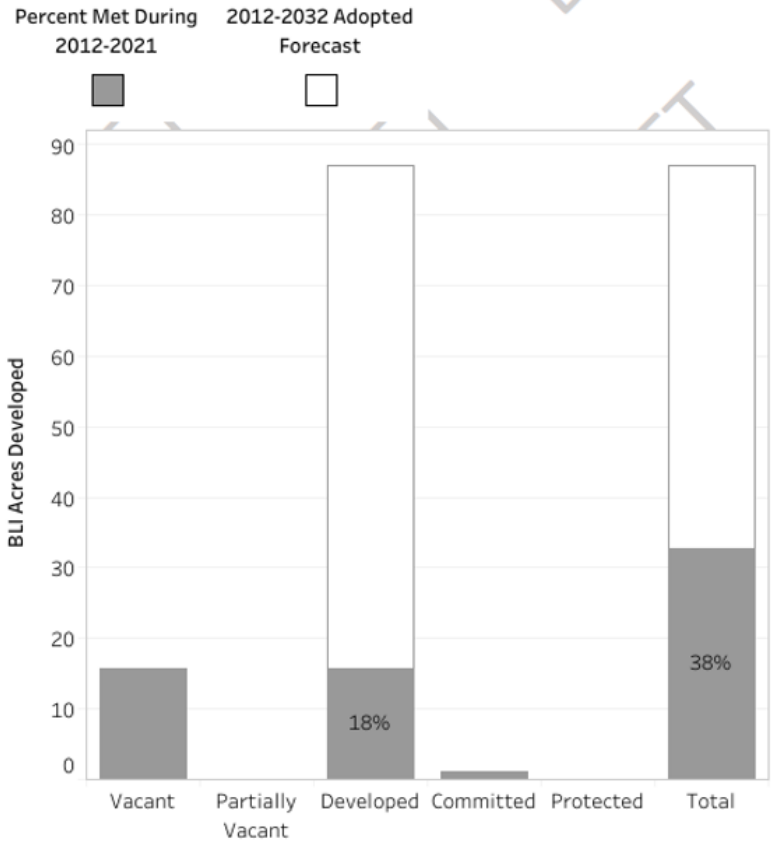
Sources:

Historical data: City of Eugene Planning and Development Department, building permits database
2012 permits were included in monitoring years only if not already clearly accounted for in the BLI.
Forecast data: City of Eugene Planning and Development Department, Eugene Land Model

- New housing developed almost 33 acres of **Commercial land** (38% of forecast). Similar to High Density Residential land, the forecast projected zero new housing on Vacant Commercial land however 15.8 acres have been developed with new dwellings. Those acres are primarily the result of two apartment developments (12 of the 15.8 acres).

Acres Developed by BLI Category and Percent of Need Met - New Dwellings: Commercial

2012 permits were included in monitoring years only if not already clearly accounted for in the BLI.



Sources:

Historical data: City of Eugene Planning and Development Department, building permits database
2012 permits were included in monitoring years only if not already clearly accounted for in the BLI.
Forecast data: City of Eugene Planning and Development Department, Eugene Land Model

Additional Developed Acres for New Dwellings from Miscellaneous Permits and Group Quarters

The charts above are the best attempt at compiling the BLI acres developed from new housing in an automated manner. Over the monitoring period, there was a relatively small amount of land developed (about 19 acres) with seemingly commercial uses that were part of a new housing

development but that needed manual review to confirm. There are two different scenarios when this happens; new miscellaneous uses such as "Entertainment" (a community or recreation building) or "Motor Vehicle" (parking garage) that upon further review are actually necessary for the housing development and should be attributed to the total acres developed for new dwellings. Conversely, commercial type uses (entertainment, retail, office, parking garages) that occur in a mixed use commercial/residential building but that are not necessary for the housing development should instead be attributed to the total acres developed with new employment uses.

After manual review of the seemingly commercial uses, of the 19 acres, only **about seven additional acres developed should be attributed to new housing development**: Low Density Residential land (0.46 acres), Medium Density Residential land (3.03 acres), High Density Residential land (1.15 acres), and Commercial land (2.36 acres).[62]

In addition, over the monitoring period **about 20 acres were also developed for group quarters-type housing (nursing homes, dorms)**:

- About 13 acres developed on Government & Education land (University of Oregon campus), which is generally consistent with the forecast need of 27 acres for dorms through 2032.
- About six acres developed on High Density Residential land and about one acre on Low Density Residential land, in comparison the Adopted Forecast assumed six acres each for group quarters on Low, Medium and High Density Residential lands.

[62] In the case of a mixed use development, the acres developed were only attributed to new housing if it was the majority of the development or easily split between the residential and non-residential use, so in some cases (e.g., a security office dwelling at a storage facility) zero developed acres was attributed to the dwellings.

E. Appendix: Housing Land Use Applications Data - Details

Land use applications do not immediately lead to land development (such as a building permit), but they can give some insight into what additional development will be occurring in the future, such as future housing densities and how many new lots were created through land divisions for future housing. Some land use applications may also impact the buildable lands inventory, such as when a property changes comprehensive plan designations (re-designation), or the land use code is amended in a way that impacts the potential development capacity of land. The following analysis of land use applications will be increased over time. For now, the analysis is focused on those applications and data that is directly related to monitoring assumptions made in the UGB analysis and related to the buildable lands inventory, residential density planned for land divisions, and amendments to comprehensive plan designations or the land use code.

Average Gross Density for BLI Capacity

Overview: The number of dwellings per total acre of land for housing developments. The average gross density is applied to buildable acres in the land supply to estimate how much capacity land has for dwellings. Data from both building permits and land use applications is used to develop the gross density assumptions.

Data Source: Data from the monitoring years, 2012-2021, was derived from the City of Eugene's Planning and Development Department land use application database. This is different from the UGB analysis which used a combination of manual review of land division plans and spatial analysis.

Relationship to UGB land supply and demand model: The average gross density to assume for new housing in each plan designation is a **key direct input** into the land supply and demand model and are adopted assumptions. For estimating the capacity of land for new housing, the net density for each plan designation is reduced by a percentage (derived from building permits and land use applications) to account for land needed for roads and utilities, resulting in a gross density assumption. The percentage or factor that the density is adjusted by is referred to as the net to gross factor. The gross density assumption is applied to the buildable acres of land in the BLI resulting in an estimate of how many new dwellings (accounting for roads to serve those dwellings) on average could be accommodated on the land.

Takeaway: Approvals over the monitoring period for land divisions (final subdivisions, final partitions) and final planned unit developments (PUDs)[63] were reviewed for the percentage of the land divisions that were dedicated to public streets and for gross density. Where there were not enough applications

[63] Final approvals from January 2012 through September 29, 2021. Final PUDs were included in the analysis to address incomplete data due to phased land divisions. Even though a partition or subdivision plat is needed to officially dedicate the right-of-way, PUDs are master plans that show the complete picture of the right-of-way needs over the entire site rather than just capturing the needs for each land division phase. Final subdivisions or partitions that were part of a PUD included in the analysis were excluded from the analysis to avoid double counting.

in the plan designation and size class, or there were no differences between the monitoring and forecast assumption, the cell with the percentage in right-of-way is grayed out in the table below:

- Land Use application's percentage of land for right-of-way ("net to gross factor"): For applications on Low Density Residential land, the average percentage of land set aside for rights-of-way to serve the planned development was lower than the adopted averages. There were few applications on Medium and High Density Residential lands.

Net-to Gross Factors by Lot Size (percentage for right-of-way/streets)

From final subdivisions, partitions, planned unit developments approvals

Plan Designation	Low Density Residential			Medium Density Residential			High Density Residential		
	Adopted Assumption	2012-2021 Average	2012- 2021 Approvals	Adopted Assumption	2012-2021 Average	2012- 2021 Approvals	Adopted Assumption	2012-2021 Average	2012- 2021 Approvals
<1 ac	4%	0%	128	0%	0%	5	0%	0%	3
1-5 ac	14%	8%	35	14%	not enough data	2	24%	not enough data	0
5+ ac	26%	10%	22	20%	6%	6	34%	not enough data	2

Cells are grayed out where there is not enough data or there is no difference from the adopted forecast

Approvals from January 2012 through September 29, 2021

- Land Use application's gross density: The gross density of these land use applications is for reference only; it provides a double check on the last table in this section which shows the gross density derived from the calculation of net density of building permits reduced by the percentage needed for right-of-way. The UGB analysis did not have the gross density of land use applications in all plan designations to compare this calculation to:

Gross Density

From final subdivisions, partitions, planned unit developments approvals

Plan Designation	Low Density Residential		Medium Density Residential		High Density Residential	
	2012-2021 Average	2012- 2021 Approvals	2012-2021 Average	2012- 2021 Approvals	2012-2021 Average	2012- 2021 Approvals
<1 ac	0%	128	0%	5	0%	3
1-5 ac	8%	35	not enough data	2	not enough data	0
5+ ac	10%	22	6%	6	not enough data	2

Cells are grayed out where there is not enough data or there is no difference from the adopted forecast

Approvals from January 2012 through September 29, 2021

- Conversion of Net Density to Gross Density for BLI capacity estimate: The tables below show the steps for converting the net density assumptions to gross density assumptions based on reducing the net density by the percentage needed for right-of-way. For some land combinations there was not enough monitoring data to update the adopted net density or the percentage of right-of-way. In those cases, the previously adopted assumption is used unless otherwise noted. The following tables show a complete picture of what assumptions will be

used in the 2021 BLI rerun to provide a housing capacity estimate (discussed in Appendix I: Buildable Lands Inventory Update).

Step 1: The net density assumptions from monitoring, now showing gray cells indicating that there was not enough monitoring data to update the net density assumption:

Net Density Assumptions 2012-2021

(Monitoring results)

Plan Designation	Low Density Residential				Medium Density Residential		High Density Residential	
	< 900'		> 900' elevation		All elevations		All elevations	
	<5% Slope	5% to 30%	<5% Slope	5% to 30%	<5% Slope	5% to 30%	<5% Slope	5% to 30%
<1 ac	7.9	6.4	not enough data	5.4	17.4	14.4	43.0	not enough data
1-5 ac	7.2	4.7	not enough data	not enough data	13.8	not enough data	23.8	not enough data
5+ ac	6.8	not enough data	not enough data	4.4	10.7	not enough data	26.9	not enough data

Step 2: Revised net density assumption table to show in italics where the previously adopted net density assumption will be used (filling in for where there was not enough monitoring data to update the net density):

Updated net density assumptions to use in Land Model, showing where the adopted assumptions did not change in italics:

Net Density Assumptions

(Assumptions to use with the 2021 buildable lands inventory Land Model)

Plan Designation	Low Density Residential				Medium Density Residential		High Density Residential	
	< 900'		> 900' elevation		All elevations		All elevations	
	<5% Slope	5% to 30%	<5% Slope	5% to 30%	<5% Slope	5% to 30%	<5% Slope	5% to 30%
<1 ac	7.9	6.4	*3.2*	5.4	17.4	14.4	43.0	*32.6*
1-5 ac	7.2	4.7	*3.2*	*3.2*	13.8	*12.5*	23.8	23.8
5+ ac	6.8	*3.2*	*3.2*	4.4	10.7	10.7	26.9	26.9

The previously adopted density assumption was used where there was not enough montioring data, except that
on MDR and HDR 5-30% slope the monitoring density of flat land was used so that sloped land density was not higher than flat land density.
The previously adopted method of one dwelling per lot for LDR lots over 900' elevation was not utilized.

Step 3: This is the table of percentages from monitoring data which are used to reduce the net density assumption to get a gross density assumption, now showing gray cells indicating not enough monitoring data. In those cases, the previously adopted assumption is used:

Net-to Gross Factors by Lot Size (percentage for right-of-way/streets) 2012-2021

(Monitoring results from final subdivisions, partitions, planned unit developments approvals)

Plan Designation	Low Density Residential			Medium Density Residential			High Density Residential		
	Adopted Assumption	2012-2021 Average	2012- 2021 Approvals	Adopted Assumption	2012-2021 Average	2012- 2021 Approvals	Adopted Assumption	2012-2021 Average	2012- 2021 Approvals
<1 ac	4%	0%	128	0%	0%	5	0%	0%	3
1-5 ac	14%	8%	35	14%	not enough data	2	24%	not enough data	0
5+ ac	26%	10%	22	20%	6%	6	34%	not enough data	2

Cells are grayed out where there is not enough data or there is no difference from the adopted forecast
NOTE: For the 2021 land model, the right-of-way percentage for MDR 5+ acres of 6% in the table above was not utilized even though there were 6 applications, instead the adopted percentage of 24% was used for that grouping of land.

Step 4: Revised table showing the resulting conversion of the net densities to the gross densities, which will be utilized to estimate capacity of the 2021 BLI:

Gross Density Assumptions 2021

(To apply to the 2021 Buildable Lands Inventory land sufficiency model)

Plan Designation	Low Density Residential				Medium Density Residential		High Density Residential	
	< 900'		> 900' elevation		All elevations		All elevations	
	<5% Slope	5% to 30%	<5% Slope	5% to 30%	<5% Slope	5% to 30%	<5% Slope	5% to 30%
<1 ac	7.9	6.4	3.2	5.4	17.4	14.4	43.0	32.6
1-5 ac	6.6	4.3	2.9	2.9	11.9	10.8	18.1	18.1
5+ ac	6.1	2.9	2.9	4.0	8.1	8.1	17.8	17.8

BLI Impact from Land Use Applications

Overview: Land use applications that can impact the capacity of the buildable lands inventory include Metro Plan amendments when a property in the buildable lands inventory changes comprehensive plan designations, or land use code amendments that impact (increase or decrease) the potential development capacity of land in the adopted BLI.

Data Source: Planning and Development Department land use applications.

Relationship to UGB land supply and demand model: The BLI impact from land use applications can be a direct input into the land supply and demand model if needed to factor in when a land use designation has changed, or a code amendment will impact the assumed capacity of land.

Takeaway: During the monitoring period, **there were no Code Amendment approvals that reduced or increased the capacity of the adopted BLI and no Metro Plan amendments that changed the designation of land in the residential land supply**.[64] The Clear and Objective code amendments do not alter or amend the City's adopted Residential Land Supply (2012-2032). There are amendments that remove or alter some code provisions that constrain housing development (such as PUD buffer areas and grading limitations) that may result in a net increase in land available for housing, but an estimate of impact on the land supply was not conducted since, if anything, these amendments would result in a net increase rather than reduction in land capacity.

Summary of BLI Impacts from Permits and Land Use Applications – Residential Land and Housing Development

The following brings together the estimated impacts to residential land along with impacts to from residential permits to any land type. The table summarizes the estimated acres of impact from building permits on residential land, including from new housing developments and related development, from group quarters and from employment development permits (discussed later in Appendix F), along with the acres of the residential BLI impacted from amendments to the land use code or Metro Plan.

[64] The code amendments and Metro Plan designation changes during the monitoring period that did impact the land supply were already accounted for as efficiency measure actions in the 2017 UGB adoption analysis.

Grayed out cells are not applicable here because they are not housing developments nor on residential land (these impacts are covered in Appendix F: Employment Development Data – Details, section Summary of BLI Impacts).

Acres of BLI Impacted from Building Permits and Land Use Applications - 2012 to 2021
Residential Land and Housing Development

	Housing Permits			Employment permits			
Plan Designation	Housing development	Miscellaneous related	Group Quarters	Employment development	Miscellaneous related	Land Use Applications	Total
Residential	**509.4**	**4.7**	**6.9**	**15.1**	**0.3**	**0**	**536.4**
Low Density Residential	390.6	0.9	1.2	2.2	0	0	394.9
Medium Density Residential	77.3	2.6	0	10.2	0	0	90.1
High Density Residential	41.5	1.2	5.7	2.7	0.3	0	51.4
Employment	**34.4**	**2.4**	**13.4**				**50.2**
Commercial	32.8	2.4	0.1				35.3
Industrial	0.1	0	0				0.1
Government & Education	1.5	0	13.3				14.8
Parks and Open Space	**2.8**	**0**	**0**				**2.8**
Total	**546.6**	**7.1**	**20.3**	**15.1**	**0.3**	**0**	**589.4**

Permits issued appx. 12/2012-7/21/21

Yogi Tea headquarters, one of the largest employment developments during the monitoring period.
Photo provided by Yogi Tea.

F. Appendix: Employment Development Data - Details

Employment Development and Land

Land in the UGB is designated or planned for different types of development. Land designated as Commercial, Industrial, and Government & Education/University Research is where most of Eugene's employment development and building permits are anticipated to occur, although some employment development also happens on residential land such as for neighborhood commercial uses (corner market, café) and some public uses like schools. Employment development of all different types is planned for and allowed in employment type designations, subject to certain standards. Historically, some employment types have been more prevalent in certain plan designations than others, such as retail occurring more often on Commercial land than Industrial land. The following analysis categorizes development by general employment types and the plan designation of the land they occur on. In addition, this Appendix focuses on measuring the development of land with employment uses, not actual job creation which is discussed under Appendix C: General Overarching Data, section Job Growth.

Issued Employment Permits

Building permit data during the monitoring period and going forward is being collected differently than the building permit data that was used during the previous UGB analysis. Going forward, the new data collection system will collect data either automatically (for simple permits) or as the permit is reviewed (for complex permits) rather than through the manual look-back process used during the UGB analysis. Building permit data reported here is for building permits that have been issued (not permits that have only been submitted and are in review), regardless of if they have received a certificate of occupancy or not. At this time, the data for this report is a combination of manual review and automated data.

For most data in this report, the starting year of the monitoring period is 2012. For employment permit data, it is more complicated. The adopted buildable lands inventory model was run in August of 2012, and then was updated in May 2013 to reflect new development that had occurred between the first run and May. In order to be able to count an entire year's worth of data, a copy of the BLI was created that rolled back those updates so that the BLI copy reflected development that had been issued as of January 2013 and any development after that date would be counted towards meeting the forecast employment development need in monitoring. Unlike housing permits, no employment permits in 2012 needed to be counted in monitoring data as they are already reflected on the BLI copy rolled back to January 2013.

Employment Building Permits

Employment Permits by Subcategory

Overview: *Employment Permits by Subcategory* shows the number of permits each year for employment-type uses, categorized into generalized subcategories: commercial non-retail, commercial retail, industrial, government or semi-public. Agriculture-related permits may be shown for a complete picture of permits but are not part of the Adopted Forecast for employment development. It includes how many permits were issued on average during the monitoring period, the average is derived from full year data only (2021 is excluded from the calculation).

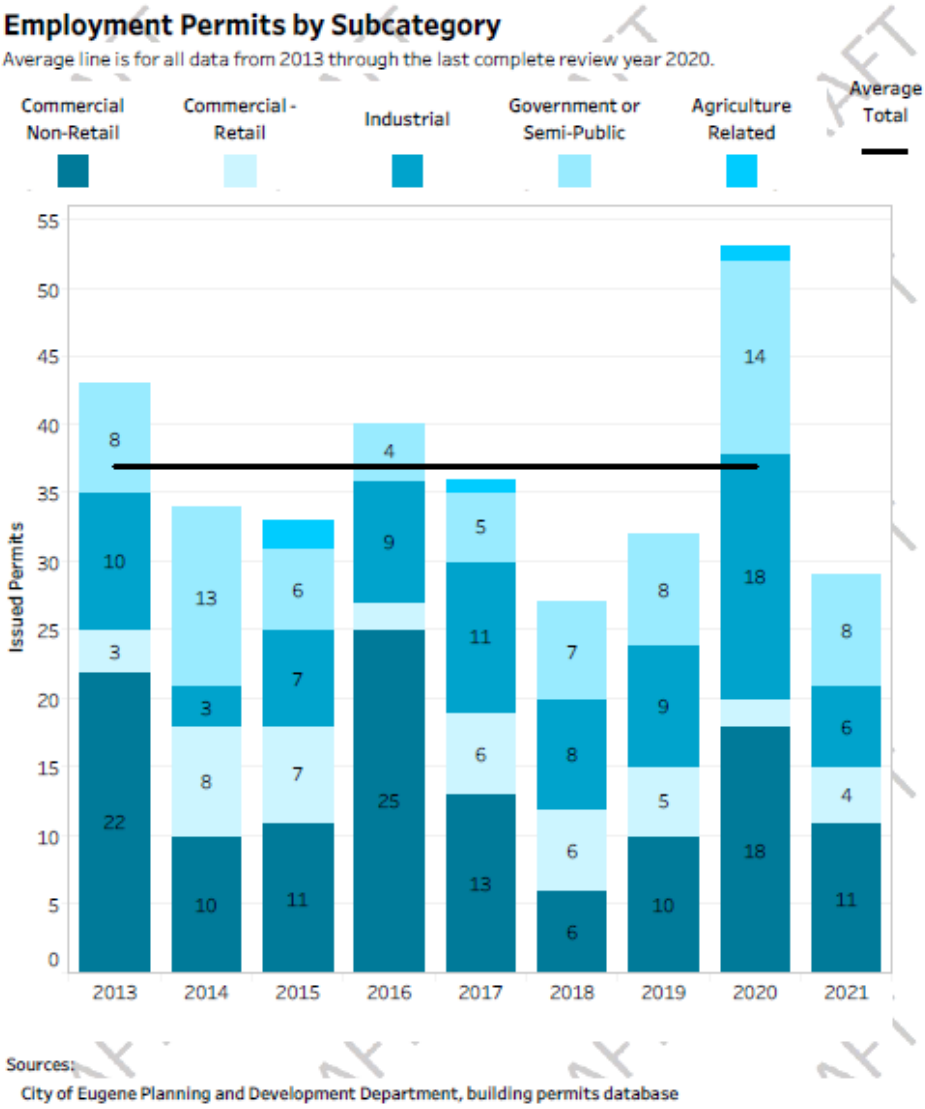
Data Source: Building permit data comes from the City of Eugene's Planning and Development Department land use and building permits database.

Relationship to UGB land supply and demand model: The number of new employment permits helps provide context for the pace of development activity over time but is *not* an adopted assumption and is not in itself a direct input into the land supply and demand model.

Takeaway: The **average number of employment permits per year over the 2013-2021 monitoring period was 37 permits**. During this time, the year that had the most employment permits was 2020 with a total of 53. Notably, 14 of these were in the Government or Semi-Public category, including permits at many local schools, Autzen stadium, and Echo Hollow pool. The commercial non-retail

subcategory had the greatest number of permits (126) throughout the monitoring period. Very few (4) agriculture-related permits were issued during this period.

The 327 employment permits issued during the monitoring period resulted in approximately 2,495,132 net new employment square footage (accounting for building demolitions as much as practicable).



Large Industrial Site Development by Site Size Classification

Overview: The Envision Eugene Comprehensive Plan and adopted UGB identified Eugene's long-term need for a specific number of large industrial sites in specific size ranges, referred to as the Industrial "large lot portfolio." This chart shows whether any of the 26 identified large lot (10+ acres) industrial sites are being developed. Large industrial sites are identified as outside of or within the Clear Lake UGB expansion area and are classified by the size of the site in acres.

Data Source: Building permit information for potential developed sites comes from the City of Eugene's Planning and Development Department land use and building permits database.

Relationship to UGB land supply and demand model: The number of large industrial sites in each site size classification is a **direct input** into a land supply and demand model and are adopted assumptions (shown in the table below).

Takeaway: **None of the large lot portfolio sites were developed during the monitoring period**. Note that the lots within the UGB expansion area are unannexed.

Large Industrial Site Development by Site Size Classification - 2013-2021

		Outside UGB Expansion Area			Within UGB Expansion Area		
Planning Period	Site Size	Available Sites	Developed Sites	Percentage Developed	Available Sites	Developed Sites	Percentage Developed
2012-2032	10 - 19 ac	10	0	0%	3	0	0%
	10 - 19 ac & 50 - 74 ac	0	0		2	0	0%
	20 - 49 ac	5	0	0%	2	0	0%
	50 - 74 ac	0	0		2	0	0%
	75+ ac	0	0		2	0	0%
	Total	15	0	0%	11	0	0%

Sources:
Available Sites: City of Eugene Planning and Development Department, Eugene Land Model
Developed Sites: City of Eugene Planning and Development Department, building permits database

*Note: There is one lot in the large lot portfolio that is very large and is divided by a utility tax lot with a stream running through it. One side of the lot was classified in the 10-19 acre site size and the other into the 50-74 acre site size. (See EC 9.4170)

Employees Per Acre of Sample Sites by Employment Category

Overview: The employees per acres (EPA), or density of employment, is the number of existing covered employees (jobs) at a point in time divided by the acres of a site. A sample of employment from sites across Eugene was analyzed that represent a range of employment types and densities. The density of covered jobs at each site are grouped into the three generalized employment categories (commercial non-retail, retail and industrial) used during the UGB analysis, resulting in a city-wide average EPA for each employment category based on existing development (an EPA for government is not necessary for this analysis).

Data Source: Eugene's "covered" jobs are pulled from Lane County's. Lane County's covered jobs are provided by the State of Oregon Employment Department (OED), Employment and Wages by Industry in the Quarterly Census of Employment and Wages (QCEW). The QCEW data is a quarterly count of employment and wages as reported by employers for workers covered by state unemployment insurance. Eugene's covered jobs estimates are from the same source but are not readily available at

the city level. Instead, to ensure the confidentiality of the data at that level, city estimates must be calculated and aggregated in a manner that ensures no less than three businesses are in the same industry sector and no less than 80% of jobs in a sector are in one business. The City was authorized to complete this EPA analysis for the most recent data set.

The covered jobs are allocated to the buildable acres of each employment site to determine the EPA for the site.

Relationship to UGB land supply and demand model: The EPA is a **key direct input** into the land supply and demand model. An average EPA was adopted for each generalized employment category: commercial non-retail (68), commercial retail (23) and industrial (10). The EPA is used in two areas of the UGB analysis. The first area is in determining the amount of land needed to accommodate job growth. The projected job growth for each employment category of commercial non-retail, retail and industrial is identified and is divided by the applicable EPA resulting in the amount of land needed to accommodate those jobs (e.g., new retail jobs divided by retail EPA is acres needed to accommodate growth). The second is related to land capacity analysis. The EPA is applied to the total acres of buildable land within each employment plan designation category (Commercial, Industrial) to estimate the amount of development capacity there is available in the land supply for new employment buildings and development or that would be eliminated if that land use was used for something else (e.g., public uses). The 2006 employment data was used for the adopted EPAs because they were the employment densities prior to the 2007-2009 recession.

Takeaway: The most recent jobs data available for Eugene is 2018. The sample sites include more than 40% of the 2018 jobs in Eugene in these three employment categories. **In all three categories the 2018 EPAs are similar to the Adopted Forecast EPAs.**

Employees Per Acres (EPA) for Specific Employment Sites

Site Type	Employment Site Name	2018 Employees	2018 Acres	2018 EPA	Adopted EPA
Commercial Non-retail		**15,558**	**238**	**65**	**68**
	Downtown Core	8,402	88	96	93
	South of Downtown Commercial District	3,109	64	49	53
	Country Club Road Office	2,070	38	55	77
	Willamette Street Commercial	1,591	33	48	35
	18th and Chambers Retail	386	15	26	30
Commercial Retail		**9,943**	**390**	**25**	**22**
	Valley River Center Regional Retail	2,188	89	25	22
	West 11th Fred Meyer Retail Center	724	44	17	14
	West 11th Retail Center	764	48	16	16
	Winco/Barger Retail Center	250	12	20	21
	Santa Clara Square Retail	744	31	24	21
	Delta Retail Center	1,269	53	24	20
	Chad Drive Regional Employment	1,044	39	27	19
	Willakenzie Community Commercial	779	21	38	36
	Oakway Community Commercial	2,181	53	41	37
Industrial*		**10,491**	**1251**	**8**	**10**
	Chad Drive Regional Employment	1,880	85	22	19
	Enid Drive Light Medium Industrial	1,549	241	6	5
	Hwy 99 Heavy Industrial	2,005	293	7	6
	North Eugene Heavy Industrial	866	290	3	3
	Prairie Road Industrial Area	1,473	160	9	7
	West Eugene Light-Medium Industrial	2,718	182	15	17
Total		**35,992**	**1,879**		

The Adopted EPAs are derived from 2006 employment data per the Eugene Employment Land Supply Study 2012-2032.

*The Adopted 10 EPA for industrial sites is the mid-point between 6 and 14 EPA, excluding EPAs at the end of the range (3 and 17).

Employment Building Permits from Efficiency Measures

As addressed under housing, efficiency measures are actions the City takes to facilitate development that uses land more efficiently than would have occurred without these incentives, based on historical trends. Efficiency measures, such as changes to the land use regulations to remove development barriers or providing financial incentives, increase the expected capacity of land for additional jobs and associated development beyond what is likely to occur if the City does not make these changes or offer incentives.

Efficiency measure actions for employment/jobs that were adopted as part of the 2012-2032 UGB adoption analysis include:

- **Downtown Programmatic Approach:** City staff and programs provide a multifaceted programmatic approach to development assistance in this area and the land use regulations were amended to remove barriers to development downtown (effective August 2013) including

at the former EWEB riverfront site (also effective August 2013 and amended in 2017 and 2019). This includes development that:

  - is within the **Downtown Plan Area boundary**, and/or
  - is within either the **Downtown or Riverfront Urban Renewal Districts and received financial incentives**. Urban Renewal or Tax Increment Financing is a tool used by municipalities to finance improvements and redevelop in specific areas of a city by reinvesting the increase in the area's property taxes.

- **Re-designation of Land to Commercial**: As part of but prior to adoption of the UGB, in July 2014 10.3 acres in the Crow Road area were re-designated from Medium Density Residential land to be a commercial node for the re-designation study area.
- **Brownfield Assessment:** A brownfield site is real property, including the expansion, redevelopment, or reuse of, which may be complicated by the presence or potential presence of a hazardous substance, pollutant, or contaminant. The Cities of Eugene and Springfield, and Lane County used federal grant funds to work with property owners and other stakeholders to take the first step towards redevelopment and reuse of brownfield sites by assessing whether they are contaminated and creating a clean-up plan as needed. Addressing brownfields enhances public health and livability and supports the development of businesses that bring new jobs.
- **E-1 Campus Employment Zone:** This zone, in effect as of June 2014, was established with the goal of supporting business and job opportunities in Campus Industrial plan designations, removing barriers and allowing medical and office uses. Commercial development in this zone counts towards the efficiency measure.
- **E-2 Mixed Use Employment Zone:** This zone, in effect as of June 2014, was established with the goal of providing commercial-industrial zoning flexibility in West Eugene, to allow adaptive reuse of existing buildings and a mixture of commercial and industrial with more retail along arterial roads. Commercial development in this zone counts towards the efficiency measure.

Other development incentives not formally adopted as efficiency measures:

- **Enterprise Zone:** Established in 2005, the West Eugene Enterprise Zone[65] is jointly sponsored by the City of Eugene and Lane County. The primary purpose of the Zone is to stimulate new investments that create jobs. Eligible new investments within the Zone can be exempted from property taxes for a period of three years, and potentially up to five years.

Note that some employment efficiency measures have financial caps or other constraints. For instance, the Brownfield Assessment program has currently spent all the program money and will need to be awarded grant money to continue.

[65] The West Eugene Enterprise Zone was expanded in 2012 in the Whiteaker area.

Acres Developed with Employment Efficiency Measures by Plan Designation Category and Use

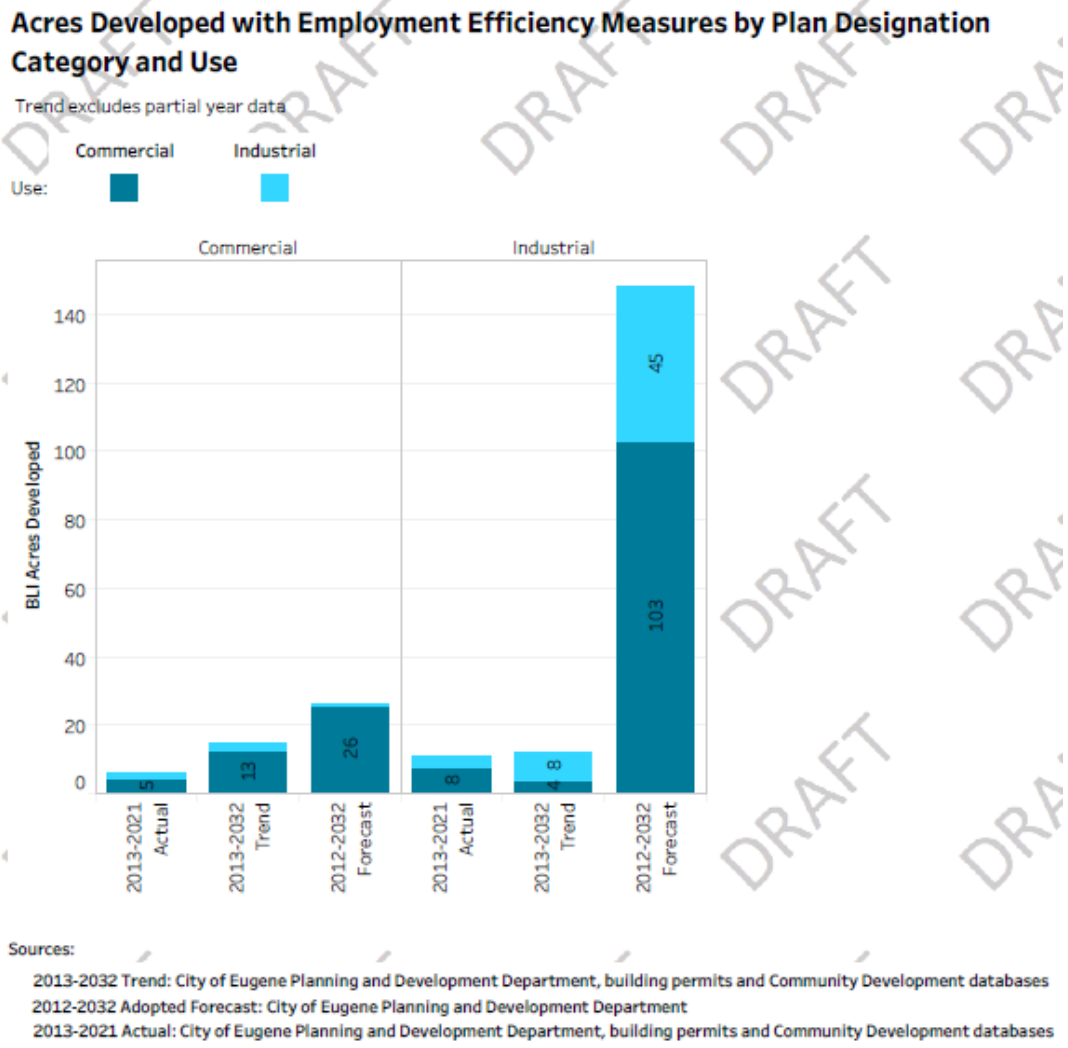
Overview: *Efficiency Measure Acres by BLI Plan Designation Category and Use* shows the acres developed from issued employment building permits that used efficiency measures, broken down by commercial and industrial uses on land designated as Commercial or Industrial comprehensive plan designations.

Data Source: The acres developed from employment permits that utilized efficiency measures comes from the City of Eugene's Planning and Development Department land use and building permit data, GIS data, and the Community Development Division's incentives data.

Relationship to UGB land supply and demand model: The acres of additional employment development capacity that each efficiency measures is anticipated to increase the capacity of the land supply for each plan designation is a **key direct input** into the land supply and demand model and are adopted assumptions. These estimates reduce the amount of land needed for a UGB expansion to accommodate the projected employment growth for each plan designation.

Takeaway: **Efficiency measures for employment development on both Commercial and Industrial plan designated land for both commercial and industrial uses were not utilized during the monitoring period as much as expected**.

It was forecast for the 2012-2032 monitoring period that 26 acres of **Commercial land** would be developed with commercial uses using efficiency measures. From 2013-2021, **six Commercial acres were developed that utilized efficiency measures**, five acres with commercial uses and one acre with industrial uses. **For Industrial land**, 45 acres with industrial uses and 103 acres with commercial uses were forecast to be developed using efficiency measures. In comparison, from 2013-2021, **three acres with industrial uses and eight acres with commercial uses were developed utilizing efficiency measures**. At the end of 2020, only 1.8 acres of Industrial land with commercial uses were developed with efficiency measures but in 2021, an additional 5.8 acres were permitted to be developed with a new USPS distribution facility utilizing the Enterprise Zone. The 2013-2021 actual acres developed with efficiency measures on Industrial land with commercial uses are more than the 2013-2032 trend because the trend excludes the 2021 partial year data.



Acres Developed with Employment Efficiency Measures by Plan Designation Category and BLI Category

Overview: *Acres Developed with Employment Efficiency Measure by Plan Designation Category and BLI Category* shows the acres developed for each efficiency measure by Commercial and Industrial plan designation as well as BLI category (Vacant, Partially Vacant, Developed, Committed). The forecast for each efficiency measure assumed the BLI category and plan designation on which the efficiency measure acres would be developed, as well as the type of use (commercial, industrial, or both).[66] The actual acres reported are the acres that fit these forecast assumptions, though there could be additional acres developed outside of the BLI categories and uses assumed.

[66] For example, for the E-1 Campus Employment Zone efficiency measure there was an assumption that new employment development would happen on Vacant land, but there may be more development occurring on Developed or Partially Vacant land that is not being monitored as efficiency measure development.

Data Source: Same as *Acres Developed with Employment Efficiency Measures by Plan Designation Category and Use.*

Relationship to UGB land supply and demand model: Same as *Acres Developed with Employment Efficiency Measures by Plan Designation Category and Use*.

Takeaway: The acres developed with new employment development that utilized efficiency measures during the monitoring period is well below the forecast for each employment efficiency measure, except for the Enterprise Zone, which did not have a forecast because it was not formally adopted as an efficiency measure.

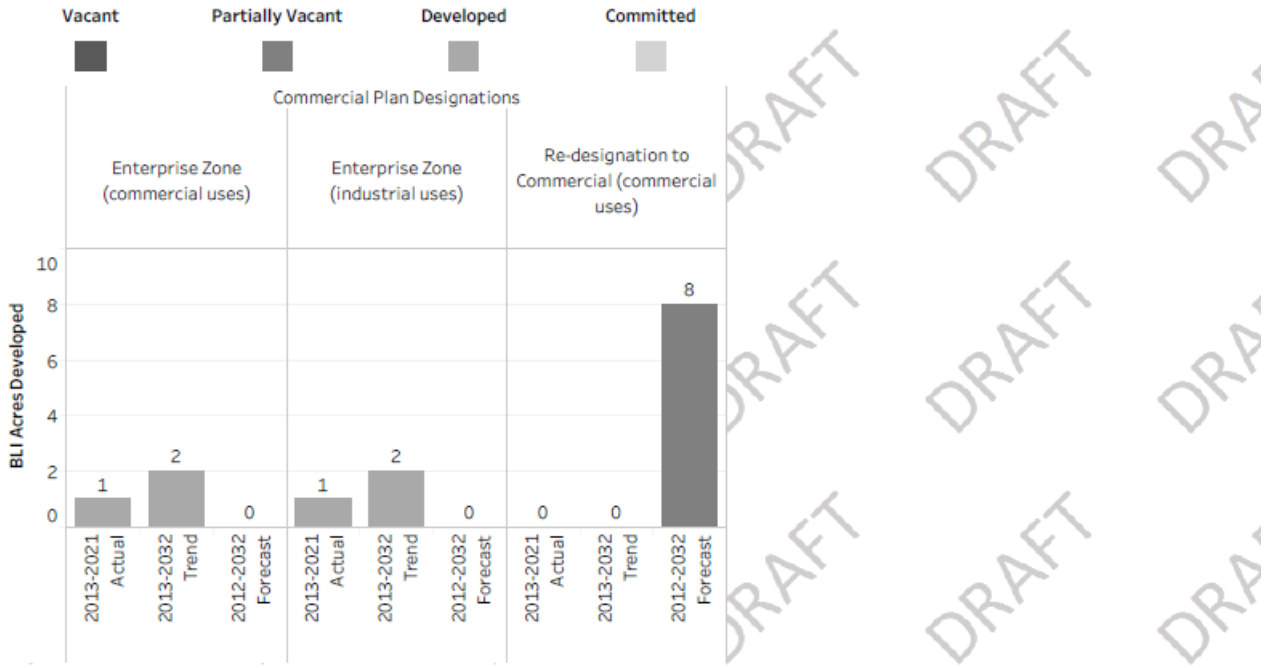
The Enterprise Zone was utilized to develop the most acres, with two acres developing on Commercial land and 10 acres developing on Industrial land. The programmatic approach for incentivizing development downtown, including in the Downtown Plan Area or in either Urban Renewal District, had four acres develop (all from Downtown Plan Area, none from Urban Renewal incentives) but development from downtown incentives will not meet the forecast of 18 acres if this trend continues through 2032. Other city-wide incentives had zero acres develop with new employment projects, including the Crow Road area site re-designated to Commercial, Brownfield Assessment sites, and development in the E-2 Mixed Use Employment Zone. There was one acre of employment development that occurred in the E-1 Campus Employment Zone efficiency measure area.

Overall, efficiency measures have not yet succeeded in spurring employment development as intended. Further study, beyond the scope of this report, can help the City understand the reasons behind the lack of development.

Commercial land:

Acres Developed with Employment Efficiency Measures by Plan Designation Category and BLI Category

Employment developments that received more than one incentive are represented under each incentive.
Projected gains from the Downtown Programs incentive are from being in the downtown plan area or in the downtown or riverfront urban renewal areas.
Trend excludes partial year data

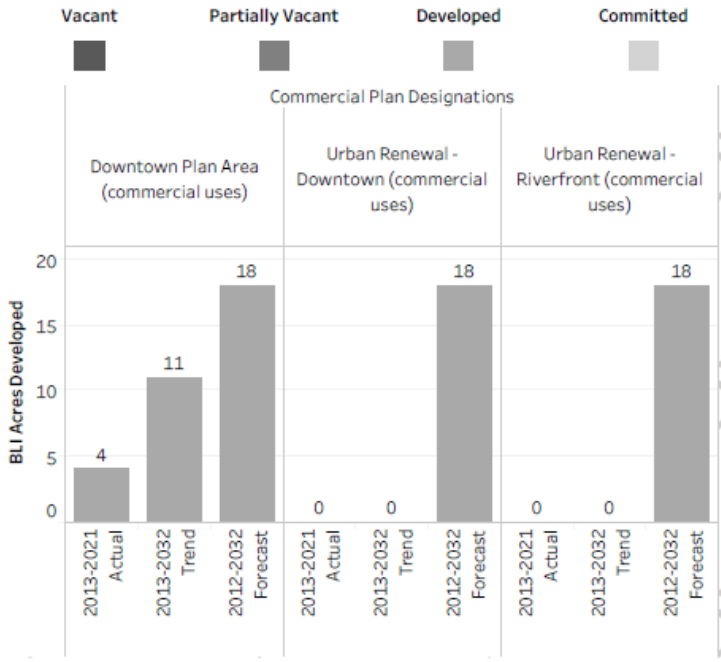


Sources:

2013-2021 Actual: City of Eugene Planning and Development Department, building permits and Community Development databases
2013-2032 Trend: City of Eugene Planning and Development Department, building permits and Community Development databases
2012-2032 Adopted Forecast: City of Eugene Planning and Development Department

Acres Developed with Employment Efficiency Measures by Plan Designation Category and BLI Category

Employment developments that received more than one incentive are represented under each incentive.
Projected gains from the Downtown Programs incentive are from being in the downtown plan area or in the downtown or riverfront urban renewal areas.
Trend excludes partial year data



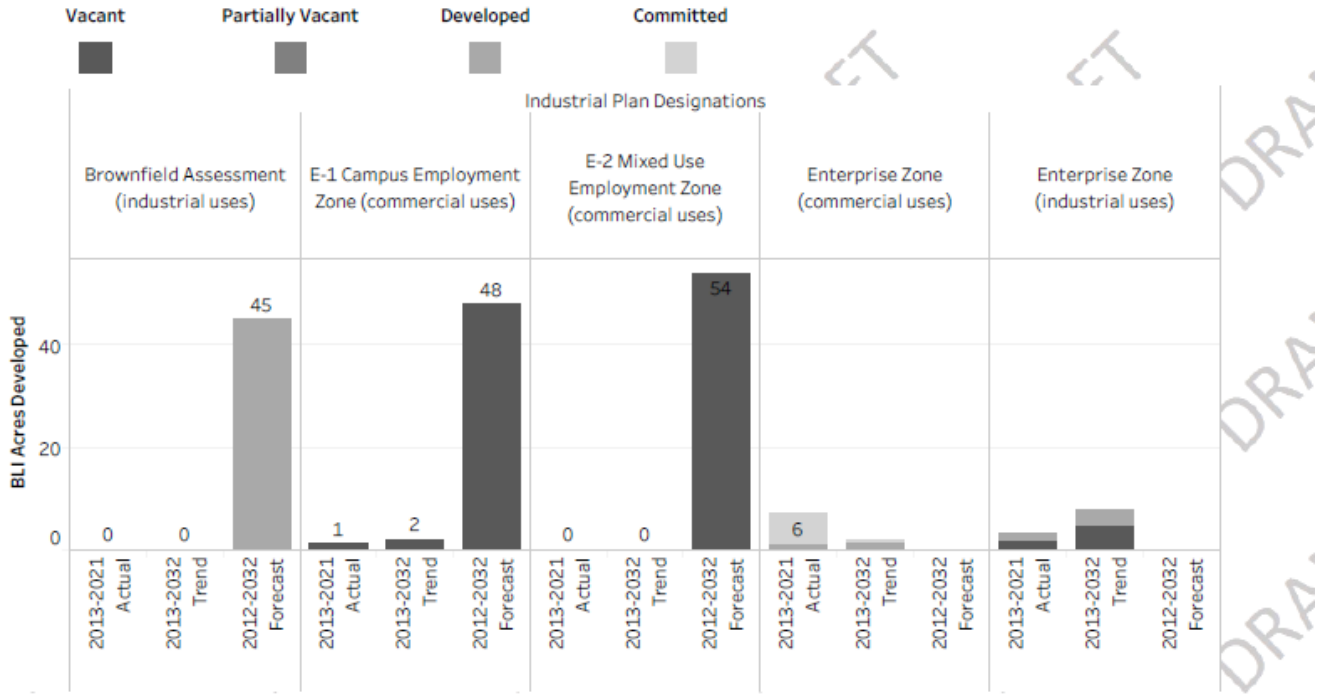
Sources:
2013-2021 Actual: City of Eugene Planning and Development Department, building permits and Community Development databases
2013-2032 Trend: City of Eugene Planning and Development Department, building permits and Community Development databases
2012-2032 Adopted Forecast: City of Eugene Planning and Development Department

- Downtown Programs: The Downtown Plan Area and the Downtown and Riverfront Urban Renewal Districts are three efficiency measures that make up the programmatic approach to encouraging more employment development downtown than would otherwise be expected without the incentives (similar to the programmatic approach for housing efficiency measures downtown). In future years, if there is development that utilizes incentives in either of the Urban Renewal Districts, the combined totals for the downtown programs can be shown together (development acres would only be counted once if utilizing multiple efficiency measures).

Industrial land:

Acres Developed with Employment Efficiency Measures by Plan Designation Category and BLI Category

Employment developments that received more than one incentive are represented under each incentive.
Projected gains from the Downtown Programs incentive are from being in the downtown plan area or in the downtown or riverfront urban renewal areas.
Trend excludes partial year data



Sources:
2013-2021 Actual: City of Eugene Planning and Development Department, building permits and Community Development databases
2013-2032 Trend: City of Eugene Planning and Development Department, building permits and Community Development databases
2012-2032 Adopted Forecast: City of Eugene Planning and Development Department

*Note: Although initially lots smaller than 0.5 acre were not flagged to be manually reviewed for their BLI impact, most of these small lots were part of a large development site, and all development sites were manually reviewed.

Employment Development Buildable Lands Impact

Annual Average Acres Developed by BLI Category and Plan Designation

Overview: The acres developed with employment development, annually on average, over the monitoring period within each BLI plan designation. The acres developed in each plan designation is then further divided by the amount developed within each BLI land category. The average is derived

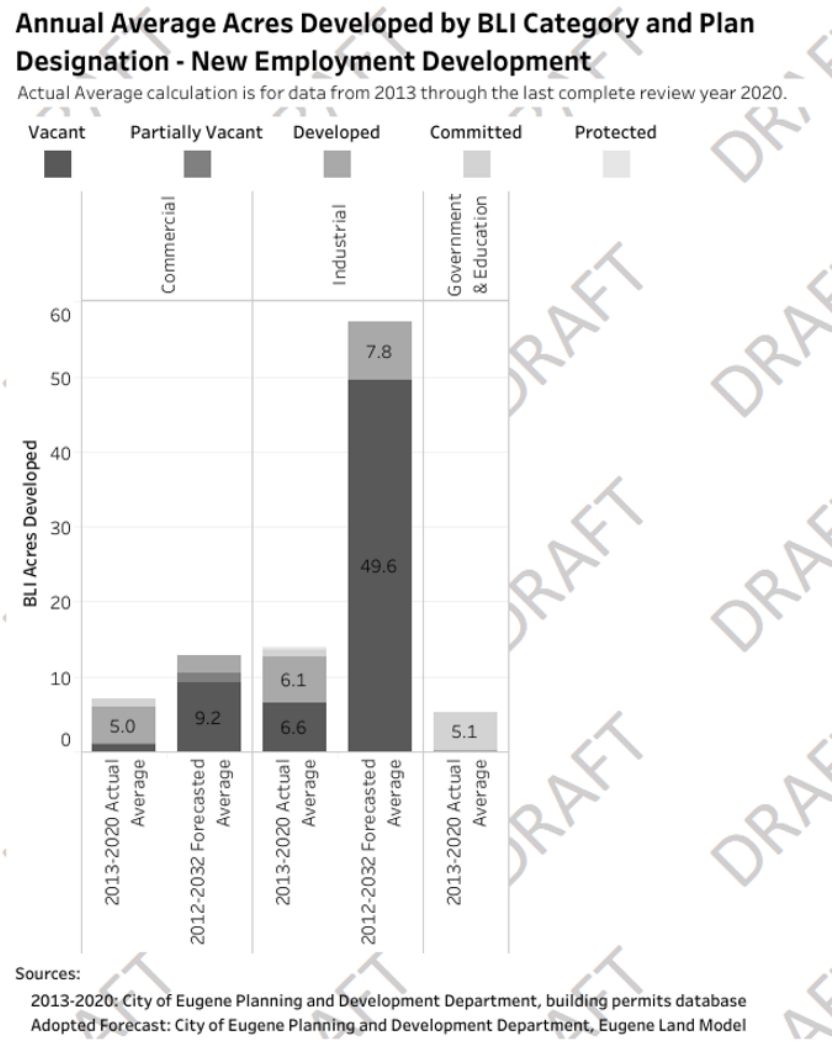
from full year data only (2012 and 2021 are excluded from the calculation). The acres developed attempts to account for all portions of the new employment development including new buildings and additions, parking, landscaping and open space, and accessory buildings and uses.

Data Source: Data from the monitoring years, 2012-2021, came from the City of Eugene's Planning and Development Department land use and building permits database.

Relationship to UGB land supply and demand model: The number of acres in the land supply available for new employment development, is a **key direct input** into the land supply and demand model and are adopted assumptions. The adopted estimated capacity is categorized by the development potential (Vacant, Partially Vacant, Developed, Committed, and no capacity was assumed on Protected) and the assumed comprehensive plan designation of the land as provided in the adopted buildable lands inventory. The average number of acres developed is *not* a direct input into the land supply and demand model but helps provides context for whether development is on pace to meet the employment building needs by 2032.

Takeaway: For 2013-2020, **Industrial land had the highest annual average number of acres developed with new employment development (13.9 acres), followed by Commercial land (7 acres) but both are well below the forecast pace of 57 acres annually for Industrial land and 12.9 annually for Commercial land.**[67] Government & Education land had an annual average of 5.2 acres developed with new employment development, many of the permits expanding local schools. There was no specific forecast adopted for the amount of Government & Education land that would develop with employment development. It was assumed that new public and semi-public development would occur on existing publicly owned land (or on existing semi-publicly owned land such as religious organizations) regardless of the plan designation, but no specific development acres were identified. The two exceptions were new public buildings in the UGB expansion areas (where no development has occurred yet) and University of Oregon uses on High Density Residential and Commercial lands.

[67] Omitted from this chart are the annual average acres developed with employment on Low, Medium and High Density Residential or Parks and Open Space plan designations, or on Protected land in any plan designation, due to the small amount of development in these areas. Development on Protected land was mostly for schools and park facilities.



Acres Developed by BLI Category and Plan Designation with Percent of Need Met

Overview: The total acres of new employment development permitted over the monitoring period within each BLI land category. Each BLI category is further divided by how many acres are on each plan designation.

Additional charts detail the acres developed in each plan designation broken down by BLI category with the remaining acres needed to meet the forecast. The remaining need is shown as the number of acres developed with new employment development over the monitoring period, the percentage of the forecast met so far, and the amount left to accommodate during the remainder of the 2012-2032 period. Bars with no percentage indicated means there was no forecast adopted for that combination of BLI land category and plan designation.

Data Source: Same as *Annual Average Acres Developed by BLI Category and Plan Designation*.

Relationship to UGB land supply and demand model: The number of acres in the land supply available for new employment development is a **direct input** into the land supply and demand model and are adopted assumptions. The adopted estimated capacity is categorized by the development potential (Vacant, Partially Vacant, Developed, Committed, or Protected) and assumed comprehensive plan designation of the land as provided in the adopted BLI.

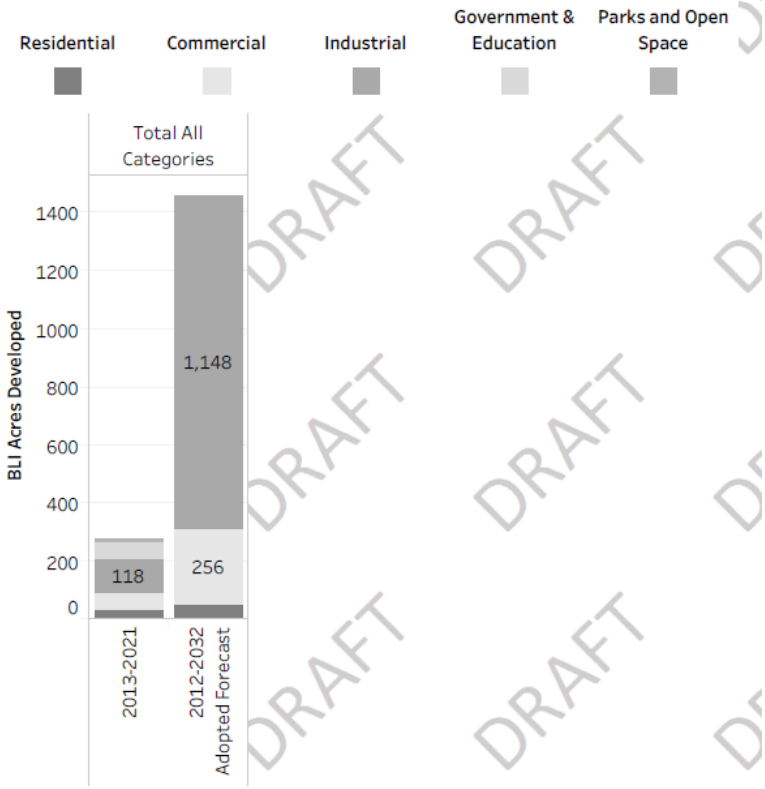
Takeaway: **The 2012-2032 Adopted Forecast for total amount of acres developed with new employment development is 1,457 acres and over the monitoring period 276 acres were developed from employment permits. If this trend continues, the forecast amount of development will not be met by 2032.** However, a large portion of the employment development forecast is for Industrial land in the Clear Lake UGB expansion area (495 acres)[68] which is mostly not yet served with utilities and annexed for development.

Development from employment permits has occurred on a mix of BLI land categories: Committed land (112 acres), Developed land (97 acres),[69] and Vacant land (63 acres). The total acres developed has been spread out between plan designations, with the most on Industrial land (43% or 118 acres) followed by Commercial land (21% or 60 acres) and Government & Education land (20% or 57 acres).

[68] The UGB expansion was actually larger than 495 acres in order to accommodate the range of site sizes needed to meet the large lot industrial needs. The amount of acres needed is based on an average lot size in each site classification range.
[69] The total acres of Developed land that was developed with employment permits includes acres from new buildings and additions but also acres from development that was not a building (new parking lot) and acres from new buildings with demolitions where the net change in building footprint was zero or less. Because the Developed acres amount could not be filtered to exclude acres from developments with a net decrease in building square feet while also not filtering out development from parking lots, ballfields, etc., the Developed acres is an overestimate.

Acres Developed by BLI Category and Plan Designation - New Employment Development

Trend calculation is for data from 2013 through the last complete review year 2020.

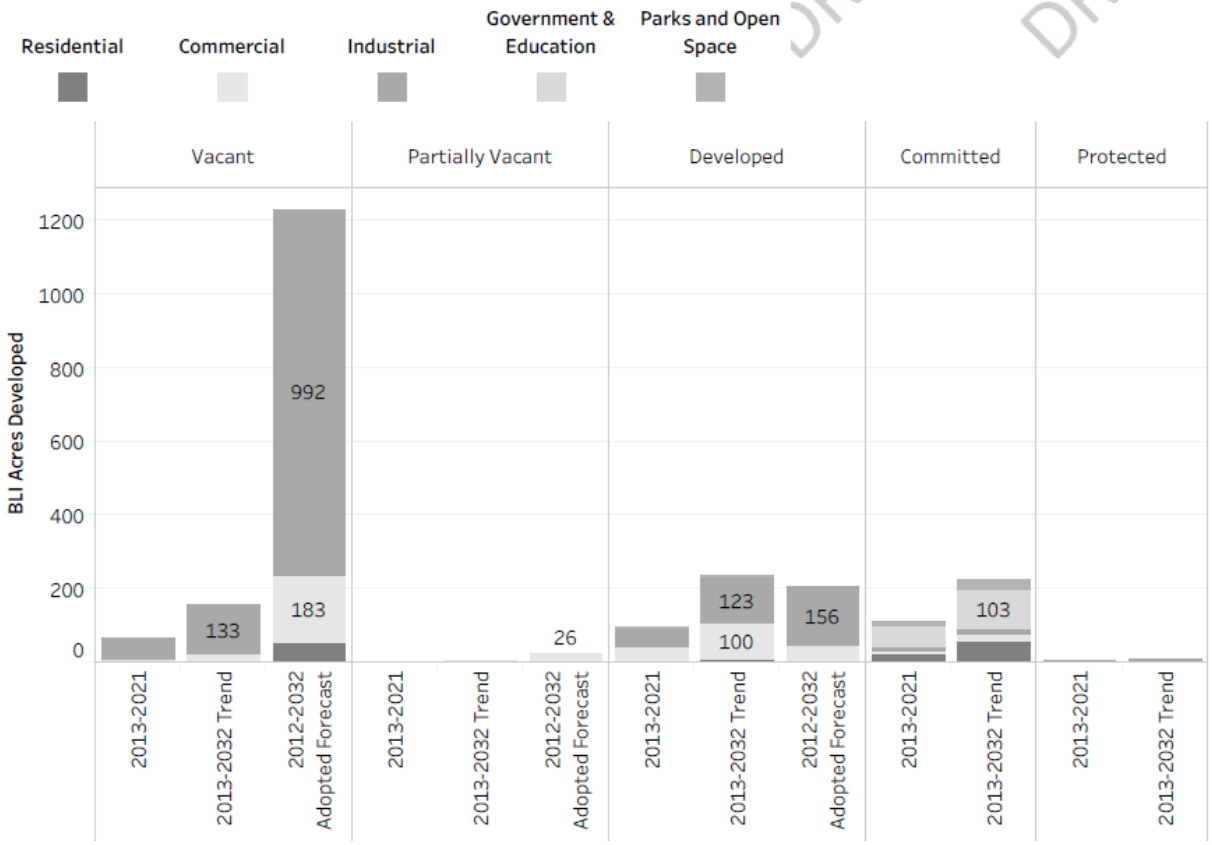


Sources:

2013-2021: City of Eugene Planning and Development Department, building permits database
Adopted Forecast: City of Eugene Planning and Development Department, Eugene Land Model

Acres Developed by BLI Category and Plan Designation - New Employment Development

Trend calculation is for data from 2013 through the last complete review year 2020.

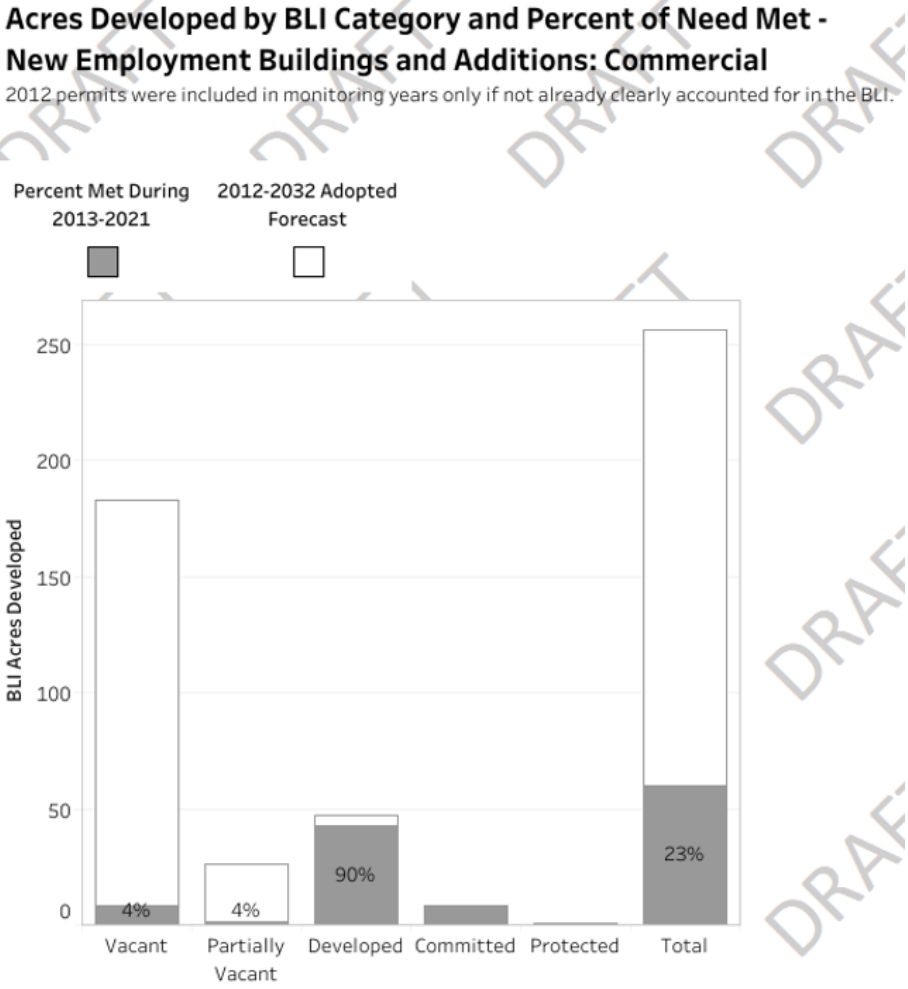


Sources:

2013-2021: City of Eugene Planning and Development Department, building permits database
2013-2032 Trend: City of Eugene Planning and Development Department, building permits database
Adopted Forecast: City of Eugene Planning and Development Department, Eugene Land Model

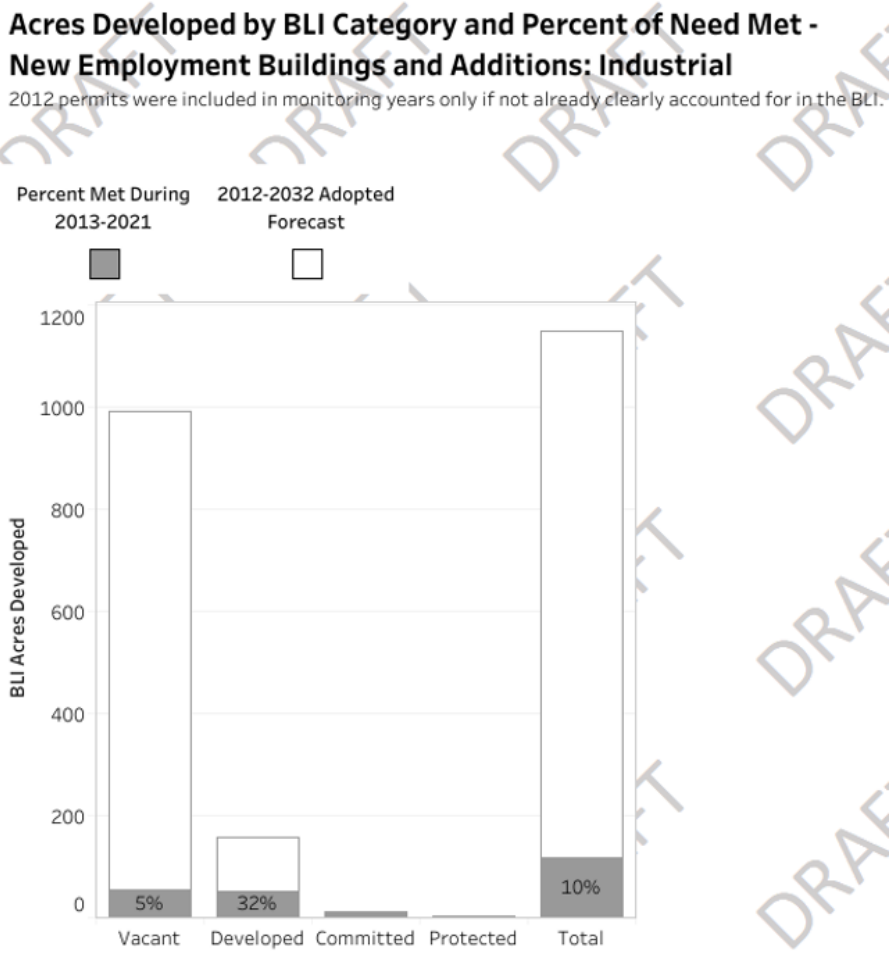
Looking closer at the breakout by plan designation:

- Overall, 23% of the forecast for Commercial land has been met (60 out of 256 acres forecast) but **90% of the forecast for Developed Commercial land has been met**, 42.5 acres of the 47 acres forecast for Developed land. These permits have been for a range of uses including a grocery store, hotel, car dealership (the largest at more than six acres), convenience stores, and storage. On the other extreme, only 4% of the forecast for Vacant Commercial land has been developed, eight of 183 acres forecast. Almost 16 acres of the Vacant Commercial land supply were developed with apartments in the monitoring period, compared to the forecast for zero residential development on Vacant Commercial.



- **Development of Industrial land, 118 acres, is well below the forecast amount** (10% of total forecast). The Veteran's Clinic and the Yogi Tea facility were the largest developments for a combined total of 16 acres, other larger developments were for lumber, mail distribution facility, warehousing, and a shell building. **This is in part because about half of the 1,148 acres**

in the Industrial land forecast[70] are within the 2017 UGB expansion area which is mostly not yet served with the utilities needed for annexation and development. When that area is served and annexed, development could happen more quickly. Additional study could be completed regarding what hurdles are preventing Vacant land from developing, compared to Developed land.

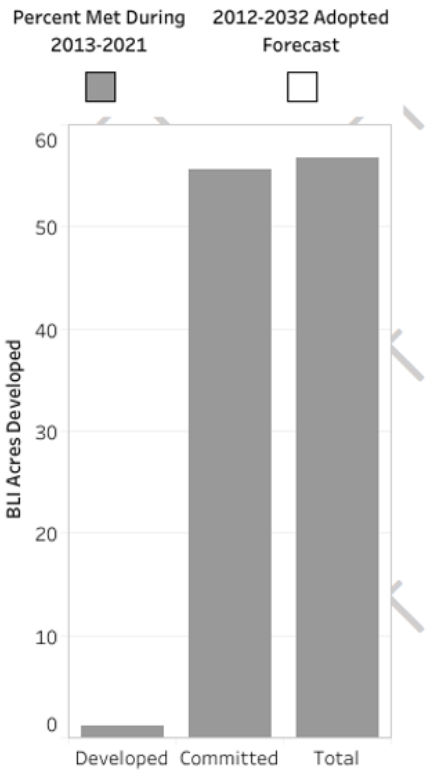


[70] The forecast amount of Industrial land supply is the acres of buildable land less than 10 acres in size, plus, for lots 10 acres or larger the total acres on average that was needed. As a result, the amount of land added to the UGB expansion is larger than what was included in the forecast supply amount since the forecast was based on averages and the amount actually added to the supply is from the buildable acres of actual lots.

- As stated above, there was no Adopted Forecast for how much Government & Education land would develop in the planning period. The majority of the 57 acres developed were for schools (including the University of Oregon) and park facilities which makes sense given that most development occurred on Committed land which is generally publicly owned land, consistent with the Government & Education plan designation.

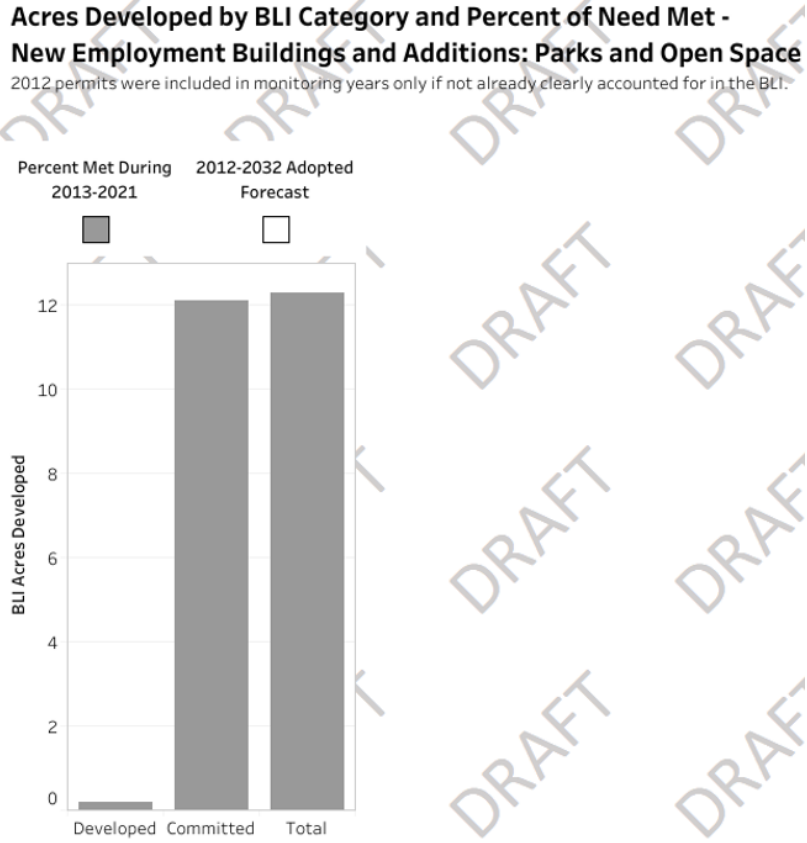
Acres Developed by BLI Category and Percent of Need Met - New Employment Buildings and Additions: Government & Education

2012 permits were included in monitoring years only if not already clearly accounted for in the BLI.



DRAFT

- There was also no adopted forecast for how much Parks and Open Space land would develop in the planning period. The majority of the 12 acres that developed were for schools and parks facilities which makes sense given that most development occurred on Committed land, which is generally publicly owned land and often aligns with the Parks and Open Space plan designation.



- The forecast assumed some new employment development would occur on Vacant land in residential plan designations, for a combined total of 53 acres on Low, Medium and High Density Residential, such as for neighborhood commercial type uses like stores and cafes. There has been a combined total of about 15 acres developed with employment (general commercial or retail) permits[71] on residential plan designations; 6% (2.2 acres) of the Low Density Residential land forecast met, 93% (10.2 acres) of the Medium Density Residential land forecast met, and 34% (2.7 acres) of the High Density Residential land forecast met. Employment on Low Density Residential land is well below the forecast pace. While employment acres developed on Medium Density Residential land is on pace, it is almost entirely from the new Kidsports facility

[71] Employment permits that were for public and semi-public type uses are excluded from this chart because the forecast for 53 acres was for neighborhood commercial type uses, commercial or retail. About 16 acres total developed with public and semi-public uses on the combined residential plan designations that are excluded here, but they were almost entirely on land already Committed, meaning already publicly owned at the time the BLI was completed; four projects together developed 14.5 residential acres for schools.

(about 9 acres). High Density Residential land is on pace with the forecast and has been developed with a variety of commercial uses, however the majority has been on Developed land rather than Vacant land.

Acres Developed by BLI Category and Percent of Need Met - New Employment Buildings and Additions: Low Density Residential

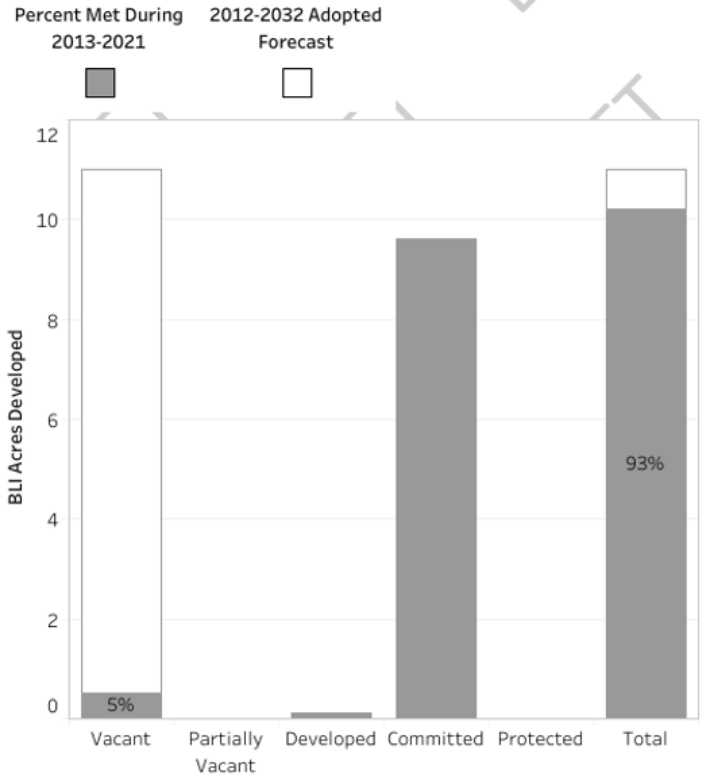
2012 permits were included in monitoring years only if not already clearly accounted for in the BLI.

Sources:

Historical data: City of Eugene Planning and Development Department, building permits database
Forecast data: City of Eugene Planning and Development Department, Eugene Land Model

Acres Developed by BLI Category and Percent of Need Met - New Employment Buildings and Additions: Medium Density Residential

2012 permits were included in monitoring years only if not already clearly accounted for in the BLI.



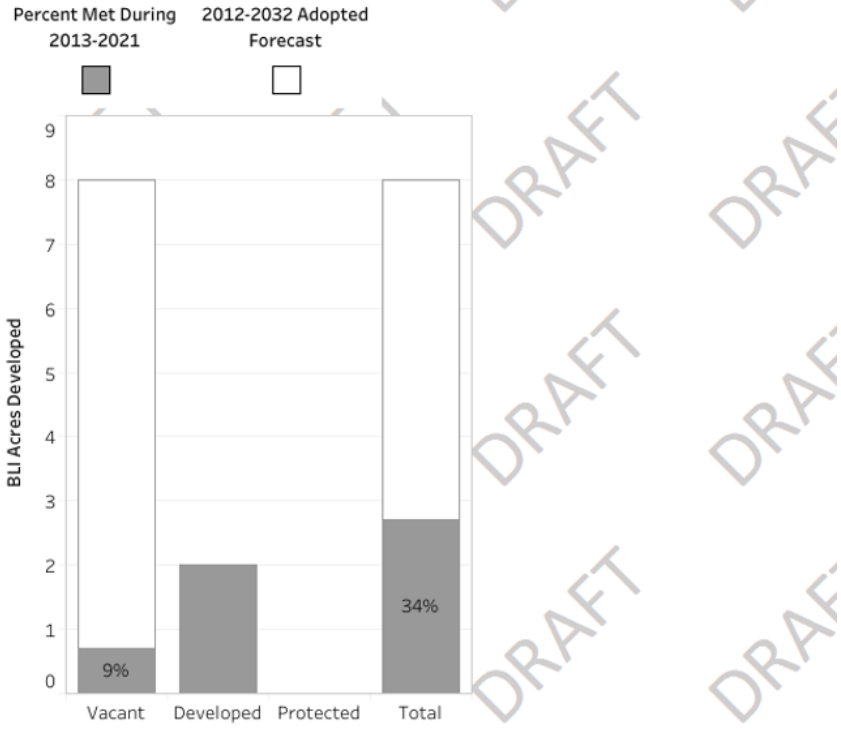
Sources:

Historical data: City of Eugene Planning and Development Department, building permits database

Forecast data: City of Eugene Planning and Development Department, Eugene Land Model

Acres Developed by BLI Category and Percent of Need Met - New Employment Buildings and Additions: High Density Residential

2012 permits were included in monitoring years only if not already clearly accounted for in the BLI.



Sources:
Historical data: City of Eugene Planning and Development Department, building permits database
Forecast data: City of Eugene Planning and Development Department, Eugene Land Model

Additional Developed Acres for Employment Development from Miscellaneous Permits

The charts above are the best attempt at compiling the BLI acres developed from new housing in an automated manner. Over the monitoring period, there was a relatively small amount of land developed (about 19 acres) with seemingly commercial uses that were part of a new housing development but that need manual review to confirm. There are two different scenarios when this happens; new miscellaneous uses such as “Entertainment” (a community or recreation building) or “Motor Vehicle” (parking garage) that upon further review are actually necessary for the housing development and should be attributed to the total acres developed for new dwellings. Conversely, commercial type uses (entertainment, retail, office, parking garages) that occur in a mixed use commercial/residential building but that are not necessary for the housing development should instead be attributed to the total acres developed with new employment uses.

After manual review of these seemingly commercial uses, of the 19 acres, there were **13 additional acres developed that should be attributed to new employment development**: Commercial land (5.6 acres), Industrial land (4.5 acres), Government & Education land (2.6 acres), and High Density Residential land (.3 acres).

Employee at Arcimoto.
Photo by Andrew Nelson.

G. Employment Land Use Applications Data – Details

Land use applications do not immediately lead to land development (such as a building permit), but they can give some insight into what additional development will be occurring in the future, such as how many new lots were created through land divisions for future employment. Some land use applications may also impact the buildable lands inventory, such as when a property changes comprehensive plan designations (re-designation), or the land use code is amended in a way that impacts the potential development capacity of land. The following analysis of land use applications will be increased over time. For now, the analysis is focused on those applications and data that is directly related to monitoring assumptions made in the UGB analysis and related to the buildable lands inventory, amendments to comprehensive plan designations or the land use code.

BLI Impact from Land Use Applications

Overview: Land use applications that can impact the capacity of the buildable lands inventory include Metro Plan amendments when a property on the buildable lands inventory changes comprehensive plan designations, or land use code amendments that impact (increase or decrease) the potential development capacity of land in the adopted BLI.

Data Source: Planning and Development Department land use applications.

Relationship to UGB land supply and demand model: The BLI impact from land use applications can be a direct input into the land supply and demand model if needed to factor in when a land use designation has changed, or a code amendment will impact the assumed capacity of land.

Takeaway: During the monitoring period, **there were no Code Amendment approvals that reduced or increased the capacity of the adopted BLI and no Metro Plan amendments that changed the designation of land in the employment land supply**.[72]

Summary of BLI Impacts from Building Permits and Land Use Applications - Employment Land and Employment Development

The following brings together the impact to employment land along with impacts from employment development permits. The table summarizes the acres of impact from building permits on employment land, including from new employment buildings and related development, from group quarters and from housing development permits (discussed in Appendix D), along with the acres of the employment BLI impacted from amendments to the land use code or Metro Plan.

Grayed out cells are not applicable here because they are not employment developments nor are they housing developments on employment land (these impacts are covered in Appendix D: Housing Development Data – Details, section Summary of BLI Impacts).

Acres of BLI Impacted from Building Permits and Land Use Applications - 2012 to 2021
Employment Land and Employment Development

	Housing Permits			Employment permits			
Plan Designation	Housing development	Miscellaneous related	Group Quarters	Employment development	Miscellaneous related	**Land Use Applications**	**Total**
Residential				**15.1**	**0.3**		**15**
Low Density Residential				2.2	0		2
Medium Density Residential				10.2	0		10
High Density Residential				2.7	0.3		3
Employment	**34.4**	**2.4**	**13.4**	**234.8**	**12.7**	**0**	**298**
Commercial	32.8	2.4	0.1	60.1	5.6	0	101
Industrial	0.1	0.0	0	118.1	4.5	0	123
Government & Education	1.5	0.0	13.3	56.6	2.6	0	74
Parks and Open Space	**2.8**	**0.0**	**0**	**12.3**	**0**	**0**	**15**
Total	**37.2**	**2.4**	**13.4**	**262.2**	**13**	**0**	**328**

*Note that the BLI impact of employment building permits on residential plan designations includes 16 acres from Public and Semi-public uses
Permits issued 12/2012-7/21/21

[72] The code amendments and Metro Plan designation changes during the monitoring period that did impact the land supply were already accounted for as efficiency measure actions in the 2017 UGB adoption analysis.

Summary of BLI Impacts from Building Permits and Land Use Applications - ALL Land

The following table **summarizes the impacts to all land types, from all permit and land use applications discussed above**. It couples the table above, *Acres of BLI Impacted from Building Permits and Land Use Applications – Employment Land and Employment Development*, with the table at the end of Appendix E, *Acres of BLI Impacted from Building Permits and Land Use Applications – Residential Land and Housing Development*.

Acres of BLI Impacted from Building Permits and Land Use Applications - 2012 to 2021

	Housing Permits			Employment permits			
Plan Designation	Housing development	Miscellaneous related	Group Quarters	Employment development	Miscellaneous related	Land Use Applications	Total
Residential	**509.4**	**4.7**	**6.9**	**15.1**	**0.3**	**0**	**536.4**
Low Density Residential	390.6	0.9	1.2	2.2	0	0	394.9
Medium Density Residential	77.3	2.6	0	10.2	0	0	90.1
High Density Residential	41.5	1.2	5.7	2.7	0.3	0	51.4
Employment	**34.4**	**2.4**	**13.4**	**234.8**	**12.7**	**0**	**297.7**
Commercial	32.8	2.4	0.1	60.1	5.6	0	101.0
Industrial	0.1	0.0	0	118.1	4.5	0	122.7
Government & Education	1.5	0.0	13.3	56.6	2.6	0	74
Parks and Open Space	**2.8**	**0.0**	**0**	**12.3**	**0**	**0**	**15.1**
Total	**546.6**	**7.1**	**20.3**	**262.2**	**13**	**0**	**849.2**

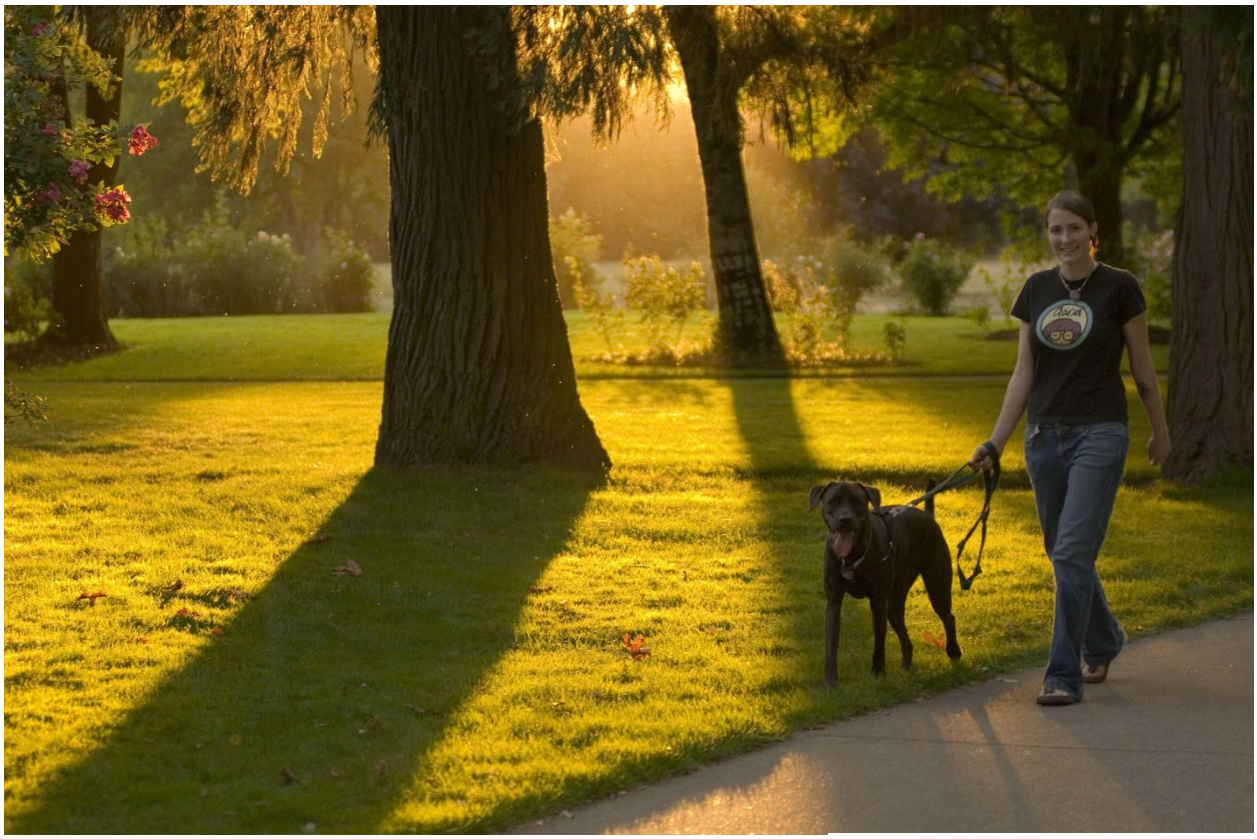


Photo by Vern Rogers.

H. Appendix: Other Metrics – Details

There are other metrics that provide important information about how the community is growing that are not direct inputs into UGB analysis or the UGB land supply and demand model, but that help inform growth management policies. Questions related to "qualitative" data are more subjective and related to the experience of our residents. For example, has the community experienced improved access for residents to shops and services in 20-minute neighborhoods? How are changes related to development and growth affecting Eugene's quality of life? Although the Growth Monitoring Program will examine both kinds of questions in upcoming phases of the program, at this point in the monitoring program development, this report relates mostly to the program's efforts to collect and share "quantitative" data.

Microduct installation in Downtown Eugene.
Photo by City of Eugene staff.

I. Appendix: Buildable Lands Inventory Update

Buildable Lands Inventory Methodology

The Eugene Buildable Lands Inventory (BLI) evaluates the available supply of developable land within the Eugene Urban Growth Boundary (UGB) and estimates how much housing and employment may be accommodated on that land in the future. The 2012 to 2032 Adopted Buildable Lands Inventory was conducted between August 2012 and May 2013. To learn how the supply of land has changed since 2013, an intermediary BLI ("BLI monitoring snapshot" or "2021 BLI") was run with an effective date of January 1, 2021.

Data sources

A spatial model (sometimes referred to as the "land model") comprised of a series of programming scripts (python) was used to create the land supply layer and estimate the residential capacity, employment capacity is estimated through a separate analysis outside of the model. The same data sources and methodology from the 2012 to 2032 Adopted BLI were employed whenever possible. However, some data sources were no longer available or more precise updated datasets had become available. For example, the 2012 to 2032 Adopted BLI used the regional land use layer as one of the primary inputs to determine whether land was developed or undeveloped, but that information has not been updated since 2012. As a substitute for the regional land use layer, the 2021 BLI used the Property Class Description from the Lane County Assessment and Taxation Department, which is updated annually. Differences such as these in source data can make direct comparison of specific properties between BLIs problematic.

BLI Table 1. Data Source Comparison Between the 2012-2032 Adopted BLI and the 2021 BLI

Dataset	Status in 2012 – 2032 BLI	Status in 2021 BLI	Difference in source data	Difference in methodology
FEMA Floodways	Protected	Protected	None	None
FEMA Special Hazard Flood Areas	Not protected	Not protected	None	None
Goal 5 Riparian Corridors	Protected	Protected	More precise LiDAR data was used in the 2021 BLI to estimate the top of bank	None
Goal 5 Uplands	Protected	Protected	More precise LiDAR data was used in the 2021 BLI to estimate the top of bank	None
Goal 5 Wetlands	Protected	Protected	None	None
Goal 6 Water Quality Waterways	Protected	Protected	None	None
Critical Habitat	Protected	Protected	Partial	Addition of state data
Natural Resource Areas	Protected	Protected	None	None
Historic Properties	Protected	Protected	None	None
Prohibitively Steep Slopes	Protected	Protected	More precise LiDAR-derived slope data was used in the 2021 BLI	None
Landslide Risk	Not protected	Not protected	New landslide data was used in the 2021 BLI	None
Land Use	Developed/ Undeveloped	Developed/ Undeveloped	The Lane County Assessor's Property Class Description was used in place of the regional land use layer which is no longer current	Yes, due to differences in land classes between the two datasets
Addresses	Developed/ Undeveloped	Developed/ Undeveloped	None	None
Building Footprints	Not used	Developed/ Undeveloped	Dataset was not used in the 2012-2032 BLI	Inclusion of dataset

Improvement Value	Developed/ Undeveloped	Developed/ Undeveloped	None	None

Evaluating Land Supply

The assessment of land supply begins by classifying each lot into five development potential categories: Committed, Protected, Developed, Partially Vacant, or Undeveloped.

First, all committed lands are identified. **Committed** land is devoted to special uses like parks, schools, government offices, cemeteries, and rights-of-way and therefore has no development or redevelopment potential. Committed land includes:

- Transportation rights-of-way (e.g., streets and rail)
- City Government Property
- County Government Property
- State Government Property (includes land owned by state-funded schools such as University of Oregon and Lane Community College)
- Federal Government Property (e.g., Bureau of Land Management)
- Parks (city, county, and state) and park easements
- School district property (e.g., 4J and Bethel)
- Cemeteries
- Public utility property for water, wastewater, electric and natural gas, including Bonneville Power Administration (BPA) easements

Next, protected lands are identified. **Protected** land is reserved to protect natural resources or because of natural hazards and therefore is assumed to have no development or redevelopment potential. Protected land includes:

- Federal Emergency Management (FEMA) Floodway areas
- Eugene's Adopted Goal 5 Riparian Corridors
- Eugene's Adopted Goal 5 Wetlands
- Eugene's Adopted Goal 5 Upland Wildlife Habitat areas
- Eugene's Adopted Goal 6 Water Quality Protection areas
- Historic and cultural resources, which are properties listed on the National Register of Historic Places, properties designated as City of Eugene Historic Landmarks, or properties that are within a Historic District (East Skinner Butte Historic District or Blair Boulevard Historic Commercial Area)
- Natural Resource (NR) plan designations
- Natural Resource (NR) zoned areas
- Federally and State-listed threatened and endangered species habitat
- Properties with active conservation easements recognized by the Lane County Assessment and Taxation Department
- Areas with prohibitively steep slopes
    - Industrial plan designations: slopes of greater than 15%

- All other plan designations (including residential and commercial): slopes of 30% or greater

Lands can be classified as Committed, Protected, or both (e.g., government owned land with protected wetlands) and as such, these classes are not mutually exclusive. In areas that are both committed and protected, the Committed classification takes priority and will be assigned to the area. The combined Committed and Protected acres is 15,243 acres for all the plan designations in the UGB, which equates to approximately 43% of Eugene's 35,570 acres.

BLI Table 2. Committed and Protected Lands, Eugene 2021

Type of Land	Acres
Residential Lands	**7,791**
Low Density Residential	6,859
Medium Density Residential	578
Medium Density Residential Mixed Use	21
High Density Residential	301
High Density Residential Mixed Use	33
Employment Lands	**7,245**
Commercial	896
Commercial	660
Commercial Mixed Use	64
Major Retail Center	106
Mixed Use	65
Industrial	2,609
Campus Industrial	540
Light Medium Industrial	1,112
Heavy Industrial	718
Special Heavy Industrial	240
Government & Education	831
University Research	99
Parks and Open Space	2,805
Parks/Open Space Mixed Use	5
Other Plan Designations	**206**
Natural Resource	163
All Other Plan Designations[73]	43

[73] Due to geospatial processing precision where the plan designation layer intersects with the UGB boundary, the land supply acres indicate that there are some acres of land in plan designations that are actually not within Eugene's UGB (Agriculture, Forest Land, Rural Residential, Sand and Gravel). These geospatial processing "slivers" of plan designations are not actually within Eugene's UGB and are therefore excluded from capacity reporting.

With Committed and Protected lands identified, the BLI categorizes the remaining land within the UGB into Developed, Partially Vacant, or Undeveloped (commonly referred to as Vacant). Property classifications and improvement valuations from the Lane County Assessment and Taxation Department are used to determine the categorization of each lot. The locations of addresses and building footprints along with aerial imagery are also used to aid in the process. Whenever there is conflicting information (e.g., significant improvement value and a property classification indicating development, but no address or building footprint), staff manually review the information for the property in question and all surrounding properties to categorize the development potential of the lot.

Tax lots are classified as **Undeveloped** (**Vacant**) if these criteria are met:

- Not fully Committed or Protected
- Has an improvement value assigned by the Lane County Assessor of less than $1,000 in 2020
- Has an undeveloped property class code from the Lane County Assessor in 2020
- Does not contain an address point as of January 1, 2021
- Does not contain a building footprint as of January 1, 2021

Tax lots are initially classified as **Developed** if these criteria are met:

- Not fully Committed or Protected
- Has an improvement value assigned by the Lane County Assessor of greater than or equal to $1,000 in 2020
- Has a developed property class code from the Lane County Assessor in 2020
- Contains an address point as of January 1, 2021
- Contains a building footprint as of January 1, 2021

Tax lots initially classified as Developed are reclassified as **Partially Vacant** if these criteria are met:

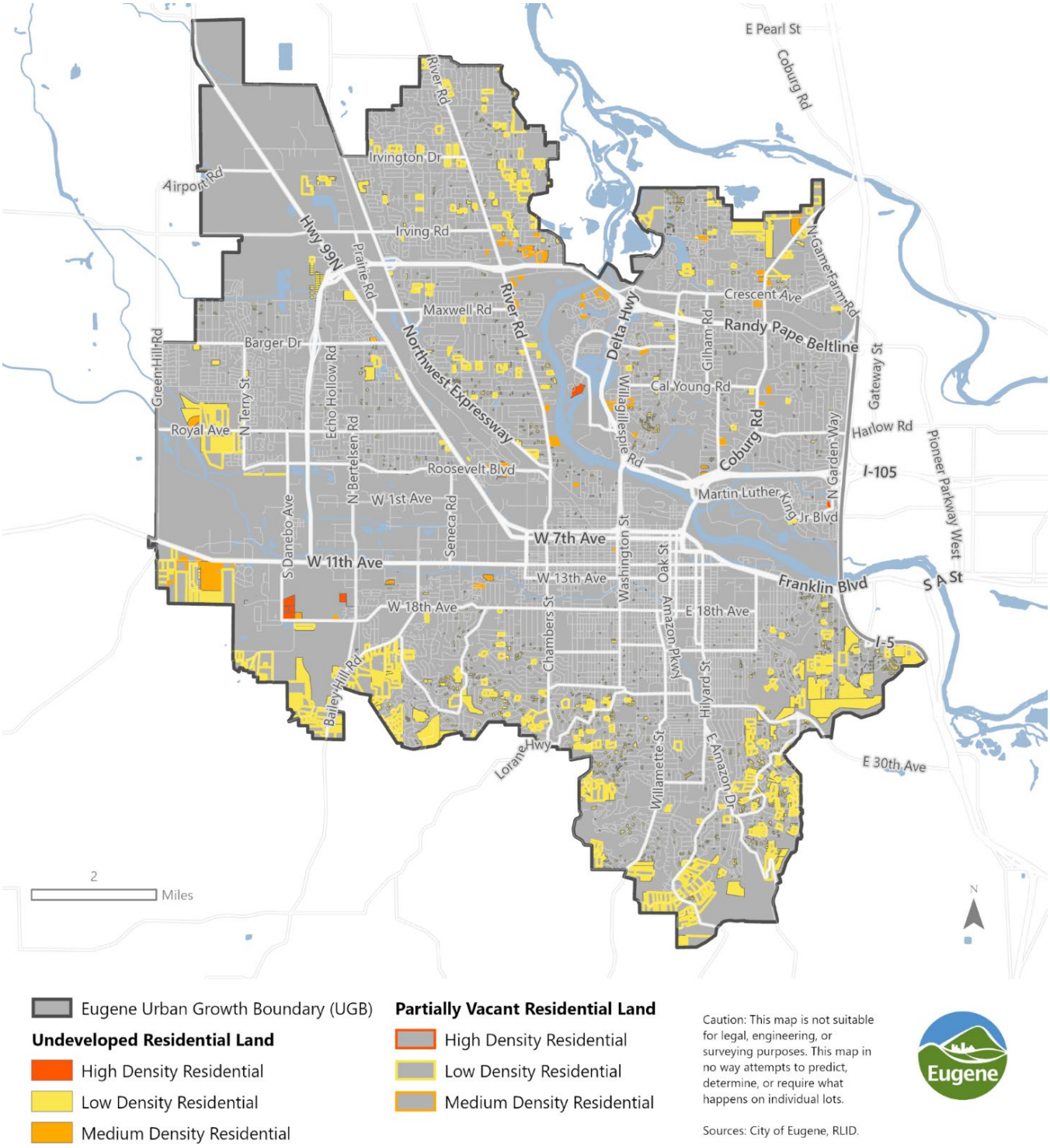
- The area of the tax lot is greater than or equal to the partially vacant threshold size
  - 0.5 ac for Medium Density Residential and Medium Density Residential Mixed-Use plan designations
  - 10 acres for Industrial plan designations
  - 1 acre for all other plan designations
- There is additional buildable land (non-committed, non-protected, non-developed land) on the lot that is greater than these thresholds:
  - Residential plan designations: 4,500 sq ft (0.1033 acres)
  - Commercial plan designations: 0.5 acres
  - Industrial plan designations: 10 acres

When evaluating lots that are eligible for the Partially Vacant development potential, the existing development is quantified to determine the remaining amount of buildable land. The 2012 to 2032 Adopted BLI applied a Low Density Residential standard existing development amount of 0.33 acres for lots with a predominant slope of 5 percent or less and 0.5 acres for lots with a predominant slope of greater than 5 percent. These standard values were based on a targeted review of development on residential lots across the Eugene UGB. A review of large developments was then conducted to manually measure the existing development visible on aerial imagery and those values were applied instead of the standard existing development amounts.

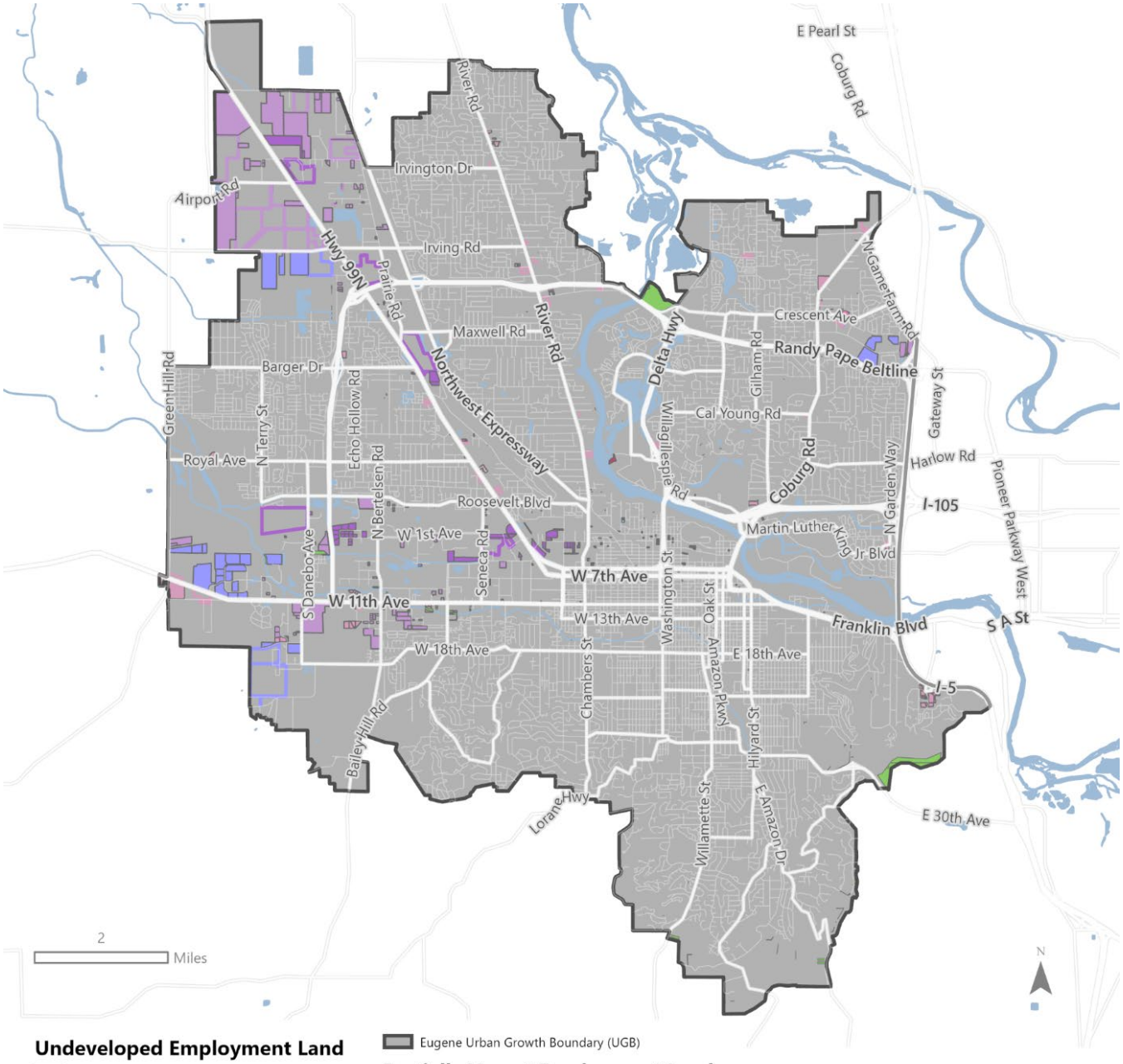
The 2021 BLI used an automated approach to buffer all building footprints and impervious surfaces (e.g., paved parking lots) on a lot, then draw a polygon completely containing all the buildings and buffers, without going beyond the edges of the lot. The size of that polygon was calculated and if it was greater than the standard amount, it was rounded to the nearest tenth of an acre and used for the existing development amount for the lot. If the automated calculation was less than the standard amount (0.33 acres for lots with a predominant slope of 5 percent or less and 0.5 acres for lots with a predominant slope of greater than 5 percent), then the standard existing development amount was applied based on the predominant slope of the lot, regardless of the plan designation. Large lots with widespread development were manually checked, and overridden if necessary, to ensure the automated calculation did not overestimate the existing development. Additionally, residential lots with buildable land near the threshold amount of 4,500 square feet were manually reviewed to approximate if the configuration of the lot could accommodate additional development.

The supply of residential and employment lands is summarized in BLI Table 3 and shown in Map 1 for residential land and Map 2 for employment land. A web map is available for those who wish to view the information in closer detail.

BLI Map 1. Residential Land Supply, 2021



BLI Map 2. Employment Land Supply, 2021



Undeveloped Employment Land

- Campus Industrial
- Commercial Mixed Use
- Commercial
- Government & Education
- Heavy Industrial
- Light Medium Industrial
- Major Retail Center
- Mixed Use
- Parks and Open Space

Eugene Urban Growth Boundary (UGB)

Partially Vacant Employment Land

- Campus Industrial
- Commercial
- Heavy Industrial
- Light Medium Industrial

Caution: This map is not suitable for legal, engineering, or surveying purposes. This map in no way attempts to predict, determine, or require what happens on individual lots.

Sources: City of Eugene, RLID.

BLI Table 3. Developed and Undeveloped Lands, Eugene 2021

Type of Land	Developed Acres[1]	Undeveloped/ Buildable Acres[2]	Percent of Undeveloped Acres that are Unannexed[3]
Residential Lands	**12,593**	**2,083**	**40%**
Low Density Residential	11,118	1,853	42%
Medium Density Residential	1,066	195	23%
Medium Density Residential Mixed Use	37	1	0%
High Density Residential	354	33	1%
High Density Residential Mixed Use	17	2	0%
Employment Lands	**4,191**	**1,468**	**58%**
Commercial Total	1,408	103	24%
Commercial	1,101	92	27%
Commercial Mixed Use	55	4	0%
Major Retail Center	192	2	0%
Mixed Use	60	5	0%
Industrial Total	2,523	1,318	63%
Campus Industrial	260	313	36%
Light Medium Industrial	1,332	773	85%
Heavy Industrial	930	231	25%
Special Heavy Industrial	-	-	-
Government & Education	21	1	0%
University Research	7	-	0%
Parks and Open Space	232	47	9%
Parks/Open Space Mixed Use	-	-	0%
Other Plan Designations	**2**	**6**	**35%**
Total	16,786	3,557	47%

[1] Developed Acres includes fully developed land and the portions of Partially Vacant land containing development.
[2] Undeveloped Acres includes completely undeveloped land and the undeveloped portions of Partially Vacant land.
[3] Only 133.6 of the 1,686 undeveloped/buildable acres that are unannexed are in River Road or Santa Clara (8%).

It is important to note that a buildable lands inventory analysis is governed by state land use law (OAR 660-008-0005 and 660-009-0005). This includes which land must be counted as buildable land, suitable and available for development, and limitations on which land can be considered not available for future development, for example if it is protected (e.g., for natural resources) or is committed to public use.

Estimating land capacity

The capacity analysis uses the land supply results to estimate how much housing and employment development could be accommodated on the developable land in the future by evaluating the characteristics of each developable lot within Eugene's UGB.

Residential Capacity

This section explains how Eugene estimated residential development capacity for the 2021 BLI, which used a similar, but more streamlined methodology to estimate residential capacity than the 2012-2032 BLI. A full explanation of the residential capacity methodology for the Adopted 2012-2032 BLI is available in section 4.1 of the Envision Eugene Residential Land Supply Study.

The estimate of residential capacity starts with quantifying the acres of Undeveloped or buildable residential land and Undeveloped or buildable portions of Partially Vacant residential land. It uses information from the density of recent development within Eugene to convert from acres of undeveloped (and Partially Vacant) land to capacity for residential development in number of dwellings. The result of the capacity analysis is an estimate of the number of dwellings that can be accommodated on Eugene's Vacant and Partially Vacant residential land.

Factors such as elevation, slope, and parcel size can affect the capacity of Eugene's land supply to accommodate new dwellings.[74] Therefore, as described below, the capacity analysis uses different density assumptions and two capacity methods for land depending on its plan designation (Low, Medium or High Density Residential), elevation (below or above 900'), slope (less than or more than 5%), and lot size (acres located on lots[75] of less than 1 acre, 1-5 acres, or 5 or more acres). Although this level of specificity makes Eugene's capacity analysis more complicated than is legally required, it produces more accurate results than a capacity analysis that uses a single method and density assumption to determine the capacity of all Undeveloped and Partially Vacant land.

- **Comprehensive Plan Designation** for Low, Medium and High Density Residential land. Medium Density Residential and Medium Density Residential Mixed Use are combined and referred to collectively as Medium Density Residential for the capacity analysis, while High Density Residential and High Density Residential Mixed Use are combined and referred to collectively as High Density Residential.
- **Lot size** for Undeveloped and Partially Vacant land. The lot sizes considered are lots smaller than 1 acre, lots 1 to 5 acres in size, and lots larger than 5 acres. Lot size is considered because

[74] The City imposes more regulation in areas of higher elevation and slope that contribute to lower residential densities in those areas. The areas are still buildable; they simply have less capacity because portions of many sites may have steep grades or are subject to Goal 5 protection measures.

[75] The buildable lands model results in a sub-tax lot level analysis. This means that in the geospatial model, a lot or subarea is not identical with a tax lot. Instead, it is a subarea of a tax lot that shares certain characteristics. For instance, if a lot has more than one plan designation, barring any other differing characteristics the tax lot would be split into subareas by the number of plan designations on the site. The term "lot" as used here refers to the sub-tax lot acre size, excluding Protected and Committed acreage.

smaller lots will require less land set aside for rights-of-way and larger lots will require more land for rights-of-way. Committed and Protected portions of a lot are excluded from the calculation of lot size. For example, if an Undeveloped Low Density Residential parcel is 1.2 acres in total, with 0.5 acres of that being Protected, its lot size for capacity calculations will be classified as less than one acre (1.2 total Low Density acres minus 0.5 protected acres equals 0.7 buildable Low Density acres). To address the fact that there are some lots that are unlikely to build without adding more acreage (e.g., very small "sliver" tax lots with only hundreds of square feet and larger lots that may be fully protected), the City did not assume any capacity for lots below a minimum lot size.[76]

- **Slope** of land. The slope categories are less than 5% slope and at or greater than 5% slope (5% to 30% slope). The slope is considered because development on lands with steeper slopes, especially in Low Density Residential, generally occurs at lower densities compared to flat land (e.g., below 5% slope), as found during the previous UGB analysis.
- **Elevation** of the land. The elevations include below 900 feet and at or above 900 feet. Elevation is considered because Eugene's development code regulates development above and below 900 feet differently in some areas of the city.

The method used in Eugene's UGB capacity analysis is the same for Undeveloped and Partially Vacant land:

- **Capacity method in dwellings per acre**. This method estimates the capacity on all Undeveloped and Partially Vacant residential land.

  This capacity method multiplies the acres of buildable land by the density assumption:

  *Buildable Land (ac) * Density (du/ac) = Capacity (du)*

  For example: 100 acres of buildable land * 6 dwellings per acre = a capacity of 600 dwellings

  Buildable land excludes any Committed or Protected portions of a lot. For Partially Vacant lots, it also excludes the amount of existing development estimated.

The density assumptions summarized in BLI Table 4 are used to estimate residential capacity and are based mostly on actual development trends within Eugene from 2012 to 2021.[77] The growth monitoring system averaged the net density at which different land categories developed over the past decade and assumes that those density trends will continue in the future. The density assumption begins with identifying a preliminary average residential density that would occur on those acres if all the buildable land was dedicated to dwellings. The method does not require site specific density

[76] The minimum lot size in R-1 Low Density Residential of 4,500 square feet was used as a proxy for the threshold of a buildable lot size in Low Density Residential plan designations.
[77] Derived from a small number of permits issued at the end of 2012 and all permits through July 21, 2021. Where there was not enough monitoring data, the previously adopted density assumptions were used.

assumptions; rather it applies average densities to all buildable land in a category to derive a dwellings capacity estimate.

Each net density is then converted to a gross density to account for buildable land that will be used for future streets and sidewalks to serve new housing. The net density assumption was adjusted to a gross density assumption based on the amounts of land used for rights-of-way in existing housing, referred to as a net-to-gross conversion.[78] Accounting for land needed for rights-of way (e.g., streets and sidewalks) in this way results in a density assumption that ensures the City is not over-estimating the housing capacity of its current residential land supply by recognizing that some land will be used for rights-of-way.

BLI Table 4. Density Assumptions for Residential Land by Category of Land, 2021 (in dwellings per acre)

	Low Density Residential				Medium Density Residential		High Density Residential	
	< 900' elevation		≥ 900' elevation		All elevations		All elevations	
Lot size	< 5% slope	≥ 5% slope	< 5% slope	≥ 5% slope	< 5% slope	≥ 5% slope	< 5% slope	≥ 5% slope
< 1 acre	7.9	6.4	3.2	5.4	17.4	14.4	43.0	32.6
1 - 5 acres	6.6	4.3	2.9	2.9	11.9	10.8	18.1	18.1
5+ acres	6.1	2.9	2.9	4.0	8.1	8.1	17.8	17.8

To estimate the residential capacity of land within Eugene, the buildable land values from Undeveloped and Partially Vacant lots shown in BLI Tables 5 and 6 are multiplied by their corresponding density assumption in BLI Table 4.

BLI Table 5. Undeveloped Buildable Acres of Residential Land by Category of Land, 2021[79]

	Low Density Residential				Medium Density Residential		High Density Residential	
	< 900' elevation		≥ 900' elevation		All elevations		All elevations	
Lot size	< 5% slope	≥ 5% slope	< 5% slope	≥ 5% slope	< 5% slope	≥ 5% slope	< 5% slope	≥ 5% slope

[78] OAR 660-024-0010(6) provides the following definition: "Net Buildable Acre" consists of 43,560 square feet of residentially designated buildable land after excluding future rights-of-way for streets and roads. Thus, a gross acre is an acre that includes future rights-of-way for streets and roads. Net densities are always higher than gross densities. Sample net to gross calculation for single-family detached using a 25% net to gross factor: Gross density = net density * (1-0.25). For example: net density of 6.0 dwelling units per acre equates to a gross residential density of 4.5 dwelling units per acre (6.0 * (1-.25)=4.5). For more information, see Appendix E, *Average Gross Density for BLI Capacity*.

[79] Buildable acres of undeveloped Low Density Residential lots smaller than 4,500 square feet are excluded from this table because they were below the threshold size for residential capacity. The minimum lot size in R-1 Low Density Residential of 4,500 square feet was used as a proxy for the threshold of a buildable lot size in Low Density Residential plan designations.

< 1 acre	132	162	1	28	12	2	2	0
1 - 5 acres	71	68	0	34	26	0	7	3
5+ acres	128	187	0	133	22	50	13	9

BLI Table 6. Partially Vacant Buildable Acres of Residential Land by Category of Land, 2021

	Low Density Residential				**Medium Density Residential**		**High Density Residential**	
	< 900' elevation		**≥ 900' elevation**		**All elevations**		**All elevations**	
Lot size	**< 5% slope**	**≥ 5% slope**	**< 5% slope**	**≥ 5% slope**	**< 5% slope**	**≥ 5% slope**	**< 5% slope**	**≥ 5% slope**
< 1 acre	7	14	0	6	9	0	< 1	0
1 - 5 acres	206	203	4	79	32	3	0	0
5+ acres	201	144	0	17	20	21	0	0

BLI Tables 7 through 11 summarize the capacity of residential land in Eugene to accommodate new housing. Undeveloped and Partially Vacant residential land within the Eugene's urban growth boundary is estimated to have capacity for roughly 12,000 new dwellings.

BLI Table 7. Estimated Housing Potential in Dwellings on Undeveloped Residential Lands by Category of Land, 2021

	Low Density Residential				**Medium Density Residential**		**High Density Residential**	
	< 900' elevation		**≥ 900' elevation**		**All elevations**		**All elevations**	
Lot size	**< 5% slope**	**≥ 5% slope**	**< 5% slope**	**≥ 5% slope**	**< 5% slope**	**≥ 5% slope**	**< 5% slope**	**≥ 5% slope**
< 1 acre	1,046	1,036	2	152	203	33	106	5
1 - 5 acres	470	294	0	99	313	0	127	50
5+ acres	782	542	0	532	179	405	228	152

BLI Table 8. Estimated Housing Potential in Dwellings on Partially Vacant Residential Lands by Category of Land, 2021

	Low Density Residential				Medium Density Residential		High Density Residential	
	< 900' elevation		≥ 900' elevation		All elevations		All elevations	
Lot size	< 5% slope	≥ 5% slope	< 5% slope	≥ 5% slope	< 5% slope	≥ 5% slope	< 5% slope	≥ 5% slope
< 1 acre	57	92	1	34	154	0	16	0
1 - 5 acres	1,359	873	11	230	380	27	0	0
5+ acres	1,229	419	0	67	159	169	0	0

BLI Table 9. Estimated Buildable Acreage on Undeveloped and Partially Vacant Residential Lands by Category of Land, 2021

Lot size	< 5% slope	≥ 5% slope	Total
< 1 acre	164*(44%)*	213 *(56%)*	377
1 - 5 acres	346*(47%)*	390 *(53%)*	736
5+ acres	384 *(41%)*	560 *(59%)*	945
Total	894 *(43%)*	1,164 *(57%)*	2,058

BLI Table 10. Estimated Housing Potential in Dwellings on Undeveloped and Partially Vacant Residential Lands by Category of Land, 2021

Lot size	< 5% slope	≥ 5% slope	Total
< 1 acre	1,585 *(54%)*	1,351 *(46%)*	2,935
1 - 5 acres	2,658 *(63%)*	1,573 *(37%)*	4,231
5+ acres	2,576 *(53%)*	2,286 *(47%)*	4,862
Total	6,819 *(57%)*	5,210 *(44%)*	12,029

BLI Table 11. Eugene's Residential Land Capacity Summary in Dwellings

Plan Designation	Undeveloped	Partially Vacant	2021 Total[80]	2012-2032 Adopted Total[81]
Low Density Residential	4,953	4,372	9,325	8,817
Medium Density Residential	1,132	889	2,021	4,644
High Density Residential	667	16	683	2,096
Total	6,752	5,277	12,029	15,557

Employment Capacity

The primary factor that Eugene considered in determining employment land capacity is employment density, which is the ratio of labor to land. There are several ways to measure employment density. The City of Eugene used the employees per acre (EPA) measurement, which is the average annual number of employees divided by the size of the site.

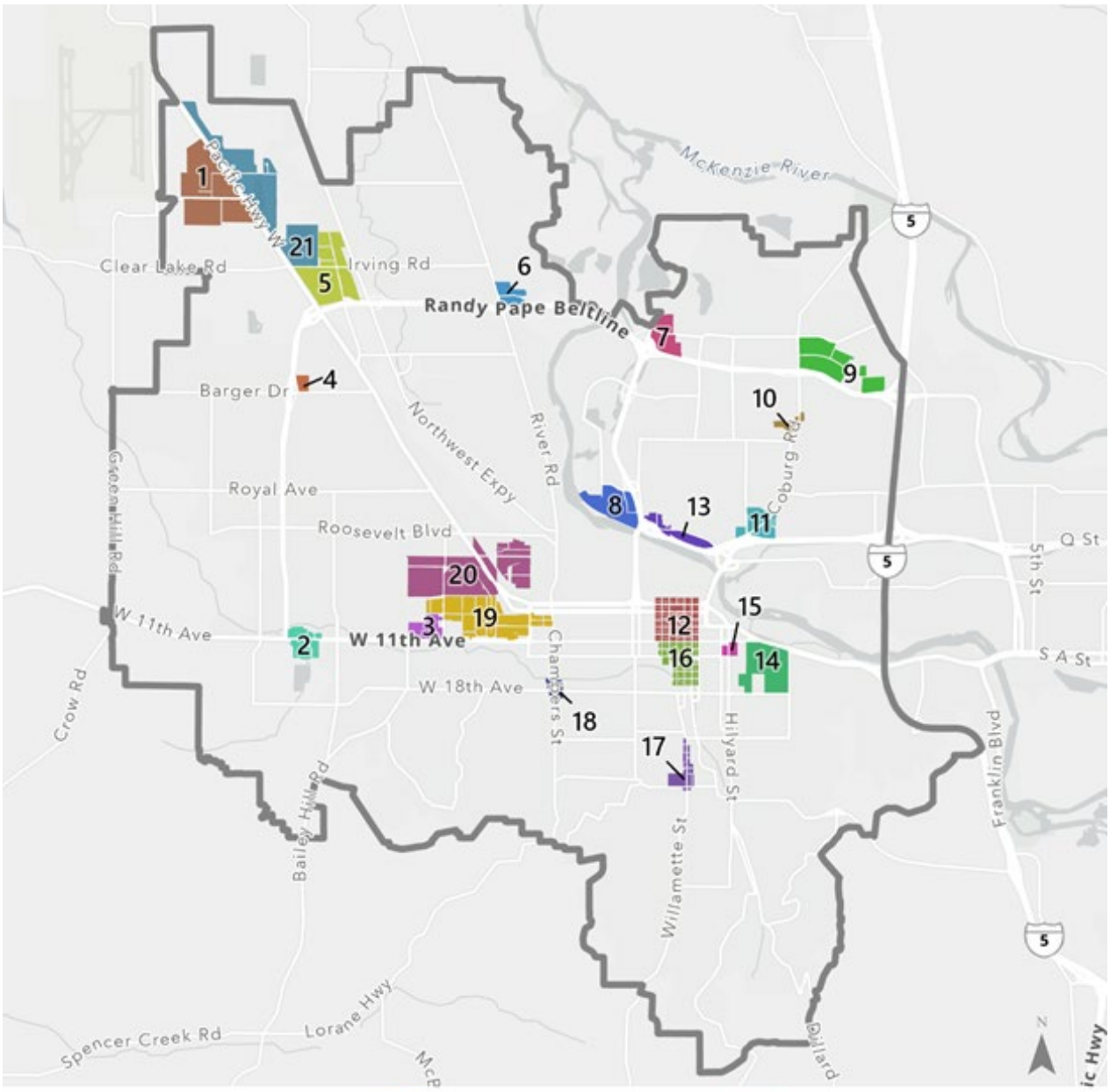
21 areas within Eugene's UGB were selected and analyzed to estimate employment in selected, representative sample areas.[82] The sample areas (shown in Map 3 and summarized in BLI Table 12) represented a range of employment types, from dense development in downtown to less dense industrial areas.

[80] If the residential capacity methods and density assumptions from the 2012-2032 Adopted BLI (as described in section 4.1 of the Envision Eugene Residential Land Supply Study) had been applied to the 2021 BLI supply of undeveloped and partially vacant residential land, the total estimated residential capacity would have been 9,694 dwelling units.

[81] The 2012-2032 Adopted Residential Capacity total includes 1,511 dwelling units of redevelopment capacity. A full explanation of the residential capacity methodology for the Adopted 2012-2032 BLI is available in section 4.1 of the Envision Eugene Residential Land Supply Study.

[82] EPA is based on analysis of unemployment insurance-covered employment in sample sites using 2018 Quarterly Census of Employment and Wages data from the Oregon Employment Department. The average 12-month employment count for 2018 was used to control for seasonal shifts in employment (for more information see Appendix F, *Employees Per Acre of Sample Sites by Employment Category*).

BLI Map 3. Employment Density Sample Sites, Eugene, 2018



BLI Table 12. Employees Per Acre (EPA) in Selected Sample Areas, Eugene, 2018

Site Type	Employment Site Name	Employees	Acres	Employees per acre
Regional Retail				
	Valley River Center Regional Retail	2,188	89	25
Community Commercial				
	18th and Chambers Retail	386	15	26
	Chad Drive Regional Employment	1,044	39	27
	Delta Retail Center	1,269	53	24
	Oakway Community Commercial	2,181	53	41
	Santa Clara Square Retail	744	31	24
	West 11th Fred Meyer Retail Center	724	44	17
	West 11th Retail Center	764	48	16
	Willakenzie Community Commercial	779	21	38
	Willamette Street Commercial	1,591	33	48
	Winco/Barger Retail Center	250	12	20
Other Commercial				
	Country Club Road Office	2,070	38	55
Downtown				
	Downtown Core	8,402	88	96
	South of Downtown Commercial District	3,109	64	49
Industrial				
	Enid Drive Light Medium Industrial	1,549	241	6
	Hwy 99 Heavy Industrial	2,005	293	7
	North Eugene Heavy Industrial	866	290	3
	Prairie Road Industrial Area	1,473	160	9
	West Eugene Light-Medium Industrial	2,718	182	15
	Chad Drive Regional Employment	1,880	85	22
Specialty				
	PeaceHealth Eugene	Confidential	Confidential	Confidential
	University of Oregon	Confidential	Confidential	Confidential
Grand Total		**48,025**	**2,017**	**24**
Commercial		25,501	628	41
Industrial		10,491	1,251	8
Specialty		12,033	138	87

An average EPA for the three generalized employment land use types (or job sector categories) is derived by compiling the densities of the selected employment sites in BLI Table 10 as show in the following table.

BLI Table 13. Employees Per Acre (EPA) for Specific Employment Sites

		2018		
Site Type	Employment Site Name	Employees	Acres	EPA
Commercial Non-retail		**15,558**	**238**	**65**
	Downtown Core	8,402	88	96
	South of Downtown Commercial District	3,109	64	49
	Country Club Road Office	2,070	38	55
	Willamette Street Commercial	1,591	33	48
	18th and Chambers Retail	386	15	26
Commercial Retail		**9,943**	**390**	**25**
	Valley River Center Regional Retail	2,188	89	25
	West 11th Fred Meyer Retail Center	724	44	17
	West 11th Retail Center	764	48	16
	Winco/Barger Retail Center	250	12	20
	Santa Clara Square Retail	744	31	24
	Delta Retail Center	1,269	53	24
	Chad Drive Regional Employment	1,044	39	27
	Willakenzie Community Commercial	779	21	38
	Oakway Community Commercial	2,181	53	41
Industrial*		**10,491**	**1251**	**8**
	Chad Drive Regional Employment	1,880	85	22
	Enid Drive Light Medium Industrial	1,549	241	6
	Hwy 99 Heavy Industrial	2,005	293	7
	North Eugene Heavy Industrial	866	290	3
	Prairie Road Industrial Area	1,473	160	9
	West Eugene Light-Medium Industrial	2,718	182	15
Total		**35,992**	**1,879**	

The Adopted EPAs are derived from 2006 employment data per the Eugene Employment Land Supply Study 2012-2032.

*The Adopted 10 EPA for industrial sites is the mid-point between 6 and 14 EPA, excluding EPAs at the end of the range (3 and 17)

To estimate the capacity of employment land within Eugene, the buildable land values from Undeveloped and Partially Vacant lots shown in BLI Table 3 are further broken down and a density applied. For Commercial buildable lots, a percentage of the land is assumed to develop with commercial non-retail land uses and the other portion with retail land uses.[83] The EPAs from the table above for each land use type are applied to the buildable land values according to the percentages in each land use type.

[83] These percentages were not changed from the adopted assumptions.

BLI Table 14. Eugene's Commercial Land Supply by Land Use Type in acres, 2021

	Undeveloped	Partially Vacant
Commercial	**77**	**25**
Non-retail commercial	39	15
Retail	38	10

BLI Table 15. Commercial Land Supply Capacity by Land Use Type (e.g., job sector category), 2021

			Office		Retail		
	gross ac	*net ac*	*% of net*	*jobs/ac*	*% of net*	*jobs/ac*	
	100%	*80%*	*64.75%*	*68*	*34.21%*	*23*	
			acres	*jobs*	*acres*	*jobs*	*Total Jobs*
Vacant Land	77	61.60	39.89	2,712	21.07	485	**3,197**
Partially Vacant Land	25	20.00	12.95	881	6.84	157	**1,038**
							4,235

For Industrial land, the previous UGB analysis divided the buildable lots by size; those that are smaller than 10 acres in size and those that are 10 acres or greater. For this analysis, the methodology for determining capacity on all Industrial sites regardless of size will be the same as the method used for Commercial land, where the capacity is derived by applying the EPA for the industrial land use type to the buildable acres in this category. Most of the land supply is in Light Medium Industrial or Campus Industrial plan designations. The combined average EPA of the sample sites that are Light Medium Industrial or Campus Industrial plan designations is 11 and is used for the capacity analysis.

BLI Table 16. Employees Per Acre (EPA) in Selected Light Medium and Campus Industrial Sample Areas, Eugene, 2018

Employment Site Name	Employees	Acres	Employees per acre
Chad Drive Regional Employment - Campus Industrial	1,880	85	22
Enid Drive Light Medium Industrial	1,549	241	6
Prairie Road Industrial Area	1,473	160	9
West Eugene Light-Medium Industrial	2,718	182	15
Light Medium and Campus Industrial Total	**7,620**	**668**	**11**

BLI Table 17. Comparison of Existing Buildable Industrial Sites (all sizes) with Demand, 2021

	Acres
Land supply	**1,318**
Vacant & developable Partially Vacant acres	1,318
Land Needed	**633**
Land sufficiency acres (deficit)	**685**

BLI Tables 15 through 17 together show that there is capacity for a total of 18,733 jobs and related development on developable employment land acres, 4,235 jobs on Commercial land (BLI Table 15) and 14,498 jobs and related development on Industrial land (1,318 acres in BLI Table 17 at 11 EPA from BLI Table 16). However, these are preliminary estimates which will be further refined during the next UGB analysis. The demand for land and the capacity for land will change when accounting for additional land needs (e.g., parks and utilities), updating the remaining land demand assumptions (e.g., new jobs forecast, total job demand) and updating land capacity assumptions (e.g., redevelopment). In addition, new state planning rules may impact the methodologies used in this analysis.

Related Data

Acres of Public Land Acquired by Plan Designation Category

Overview: Urban growth boundary (UGB) planning requires estimating the amount of public uses that are likely to be located on employment and residential land. These uses displace capacity for jobs or housing that would otherwise occur on employment and residential land and this loss is factored into how much capacity there is left for future jobs and housing. Examples of public uses include land for public facilities, parks and open space, and schools. This table shows the net change in land 'committed' to public uses as of December 2019 compared to the amount of land committed to public uses at the time the adopted UGB buildable lands inventory (BLI) was run in 2012. The net change is then compared to the adopted estimates for public land need for the 2012-2032 UGB planning period. More information can be found at the Comparison of Committed Lands story map.

Data Source: This GIS analysis was completed using information from the Tax Assessor regarding owner name and tax exemption status for government use and right-of-way. The adopted acres projected to be needed for public uses were compiled from the actual needs identified at the time in the City's Capital Improvement Project lists, utility master plans, Eugene's adopted parks project list and school district master plans.

Relationship to UGB land supply and demand model: The land model includes as a **direct input** an estimate of land (acres) needed for public uses in Residential, Commercial and Industrial plan designations. The model for the 2017 UGB analysis included the 2012-2032 Adopted Forecast

estimates in the table below (rolled up into generalized plan designation categories) for how much of the 2012 UGB would need to be further acquired for public uses. The land model also included the amount of land needed for public use that could not be met inside the UGB. The adopted 2017 UGB included an expansion to address this need so that is not further analyzed here. Public use needs can often be more readily identified than other parts of the UGB analysis which are derived from job and population growth projections. In addition, changes in public policy direction or public needs can directly and significantly impact the amount of land needed for public uses, such as for a new utility plant or new school.

Takeaway: **The net change in land acquired for public uses has significantly exceeded the projected need on residential and commercial plan designations**. Notable acquisitions include Erin Noble Headwaters Park (Martin Street), City purchase off Owen Loop, LTD purchase off Hunsaker Ln, and along NW Expressway and Roosevelt Blvd. **However, there are some cautions to note**.

- The methodology for identifying land committed to public uses has changed slightly since the 2012-2032 BLI and UGB analysis.
- A regional land use GIS layer originally used is no longer being updated so was omitted from the public land query.
- The public land query has been improved with more automatic filters (such as identifying publicly leased land, identifying seemingly public lots but that are being taxed so are not in public use) to reduce the amount of manual overrides (manual data clean-up).
- Some lots that are now showing as Committed were already identified as Protected during the 2012 BLI so while the BLI category changed to Committed there was no change to the capacity of the site (e.g., the Nature Conservancy in west Eugene south of 18thAvenue).

In the future, rerunning the BLI using this new methodology will be more accurate for comparison between BLI runs than it is comparing this data against the 2012 BLI.

J. Appendix: Data Snapshot Comparison Table

Below is a snapshot comparison of the monitoring data discussed in the comprehensive report compared to previous estimates. Data is for Eugene unless otherwise noted.

Adopted* Assumption or Other Data: This is the data or adopted assumption used as a forecast or projection in the most recent adopted land demand and capacity studies for Eugene's 20-year period, currently the 2012-2032 Residential and Employment Land Supply Studies adopted in 2017. Some data was specifically adopted as an input into the UGB analysis and is denoted with an "*." Other data was included in the adopted studies to provide context but is not necessarily an adopted assumption.

Monitoring Data: This is either the total cumulative or overall average of data for Eugene (unless otherwise noted) during the monitoring period up to the time the comprehensive report was compiled, or is the point in time data available when the comprehensive report was compiled.

General /Overarching Data: Population Growth

	Adopted* 2012-2032 Forecast < or > Start of monitoring period	Monitoring Data (total, average, or point in time)	Change
Planning Period	2012-2032* 20 years - this does not change until a new UGB analysis is adopted	2012-mid- 2021 8.5 years - monitoring period	n/a
Population Growth Rate	0.9%* (33,778 people) Extrapolated from 2009 PSU[1] forecast	1.2% (17,291 people) 2012-2021 PSU annual estimates	**Higher**
Population Growth Rate Forecast	0.9%* Extrapolated from 2009 PSU forecast	0.9% 2020-2040 PSU forecast (2021)	No/Minimal Change

[1]PSU Portland State University

General /Overarching Data: Households

	Adopted* 2012-2032 Forecast < or > Start of monitoring period	Monitoring Data (total, average, or point in time)	Change
Population in Group Quarters (percent and number of new people)	4.6%* (1,554 people) 2010 Census	3.8% 2019 1-year ACS	**Lower**

General /Overarching Data: Households

	Adopted* 2012-2032 Forecast < or > Start of monitoring period	Monitoring Data (total, average, or point in time)	Change
Residential Vacancy Rate (percent and number of new dwellings)	5%* (719 dwellings) 2010 Census	3.6% 2019 1-year ACS	**Lower**
Persons per Household	2.24* 2010 Census (safe harbor[84])	2.27 2019 1-year ACS	No/Minimal Change
Household Composition	49% Non-family 27% Family w/o children 24% Family w/ children 2012 1-year ACS	50% Non-family 28% Family w/o children 23% Family w/ children 2019 1-year ACS	No/Minimal Change
Population of Latino/a/x Origin	7.5% 2012 1-year ACS	10.2% 2019 1-year ACS	**Up**
Population by Race and Latino Origin	83% White non-Hispanic 10% All other races 7% Hispanic or Latino 2012 1-year ACS	78% White non-Hispanic 12% All other races 10% Hispanic or Latino 2019 1-year ACS	**Mixed**
Households by Tenure	50% Owner Occupied 50% Renter Occupied 2012 1-year ACS	47% Owner Occupied 53% Renter Occupied 2019 1-year ACS	No/Minimal Change
Owner and Renter Households by Tenure and Housing Type	2012 1-year ACS	2019 1-year ACS	
Single-family detached	77% Owner Occupied 23% Renter Occupied	78% Owner Occupied 22% Renter Occupied	No/Minimal Change
Single-family attached	32% Owner Occupied 68% Renter Occupied	37% Owner Occupied 63% Renter Occupied	No/Minimal Change
Two to four units	8% Owner Occupied 92% Renter Occupied	2% Owner Occupied 98% Renter Occupied	**Mixed**
Five or more units	3% Owner Occupied 97% Renter Occupied	3% Owner Occupied 97% Renter Occupied	No/Minimal Change

[84] Per OAR 660-023-0020(2) "A "safe harbor" consists of an optional course of action that satisfies certain requirements under the standard process. Local governments may follow safe harbor requirements rather than addressing certain requirements…" Some of the adopted assumptions were safe harbors.

General /Overarching Data: Affordability

	Adopted* 2012-2032 Forecast < or > Start of monitoring period	Monitoring Data (total, average, or point in time)	Change
People in Poverty	27.6%	17.3%	**Down**
	2012 1-year ACS	2019 1-year ACS	
Median Household Income	$39,150	$51,269	**Up** (31%)
	2012 1-year ACS (not adjusted for inflation)	2019 1-year ACS (not adjusted for inflation)	
Median Family Income	$57,395	$84,543	
		2019 1-year ACS (not adjusted for inflation)	
Median Sales Price by Housing Type	2012 RLID	2021 RLID	
Single-family detached	$205,000	$423,000	**Up** (106%)
Single-family attached	$123,500	$255,000	**Up** (106%)
2-4 dwellings	$223,950	$440,000	**Up**
5+ dwellings	$472,500	$1,825,000	– (few sales)
Median Gross Rent	$831/month	$1,099/month	**Up** (32%)
	2012 1-year ACS	2019 1-year ACS	
Ratio of House Value to (Median Household) Income	5.9	6.4	**Up**
	2012 1-year ACS	2019 1-year ACS	
Percentage of Renter Monthly Income Spent on Rent	47%	39%	**UP**
	2012 1-year ACS	2019 1-year ACS	
Cost-Burdened Households	2012 1-year ACS	2019 1-year ACS	
All households	45%	41%	**Down**
Renter Households	60%	56%	**Down**
Owner Households	40%	25%	**Down**
Severely Cost-Burdened	2012 1-year ACS	2019 1-year ACS	
All households	26%	20%	**Down**
Renter Households	39%	30%	**Down**
Owner Households	13%	10%	**Down**

General /Overarching Data: Job Growth

	Adopted* 2012-2032 Forecast < or > Start of monitoring period	Monitoring Data (total, average, or point in time)	Change
Employment Growth Rate	1.4%* Based on 2012-2022 Oregon OED forecast *for Lane County* total jobs	3.1% 2012-2018 OED covered jobs data	**Higher**
Employment Growth Rate Forecast	1.4%* 2012-2022 OED forecast (2012) *for Lane County* total jobs	1.4% 2020-2030 OED forecast (2020) *for Lane County* total jobs	No/Minimal Change
Unemployment Rate	9.1% 2011 US Bureau of Labor Statistics	4.1% 2018 US Bureau of Labor Statistics	**Down** (5.8% 2020)
Mix of job types	2012-2032	2018 covered jobs data	
Commercial non-retail	55%	55%	No/Minimal Change
Commercial Retail	12%	13%	No/Minimal Change
Industrial	19%	18%	No/Minimal Change
Public	14%	15%	No/Minimal Change
Employee Density	2012-2032 (based on 2006 jobs data)	2018 covered jobs data	
Commercial Non-retail	68 EPA	65 EPA	No/Minimal Change
Commercial Retail	22 EPA	25 EPA	No/Minimal Change
Industrial	10 EPA	8 EPA	No/Minimal Change
People to Covered jobs Ratio	1.4 jobs to 1 person 2012-2032 total jobs in UGB to total population in UGB	1.7 jobs to 1 person 2018 covered jobs in UGB to total population in city limits	**Up**
Average Annual Wage or Pay	$41,456 (adjusted for inflation) 2012 OED for *Lane County*	$49,503 (adjusted for inflation) 2020 OED for *Lane County*	**Up**

Housing Development

	Adopted* 2012-2032 Forecast < or > Start of monitoring period	Monitoring Data (total, average, or point in time)	Change
Population Growth to New Dwellings Growth Rates	0.9% population 1.1% new dwellings 2012-2032 from 2009 PSU population forecast	1.2% population 1.4% new dwellings PSU annual certified estimate and 12/2012-mid-2021 issued building permits	**Up**
Residential Development			
Number of New Dwellings	15,105*	8,011 12/2012- mid-2021 issued building permits	**On pace**
Mix of *Existing* Dwellings	56% single-family detached 8% single-family attached 36% multi-family 2011 ACS	56% single-family detached 7% single-family attached 37% multi-family 2012 residential addresses plus mid-2021 issued building permits (methodology change)	No/Minimal Change
Mix of *New* Dwellings		12/2012- mid-2021 issued building permits	
Single-family detached*	55% (8,308 dwellings)*	27% (2,191 dwellings)	**Below pace**
Single-family attached*	8% (1,207 dwellings)*	1% (78 dwellings)	**Below pace**
Multi-family*	37% (5,590 dwellings)*	72% (5,742 dwellings)	**Above pace**
2-4 dwellings	(1,814 dwellings)*	(412 dwellings)	**Below pace**
5+ dwellings	(3,776 dwellings)*	(5,330 dwellings)	**Forecast met**
Average Density (net)	Based on 2001-2012 GIS (spatial) and land division plat analysis	12/2012- mid-2021 issued building permits	
Low Density Residential land	5.4	7.1	**Up**
Medium Density Residential land	15.4 Reflects land use code change increasing minimum density	14.3 Land use code not adopted until 2017	**Up** (up from pre-2012)

Housing Development

	Adopted* 2012-2032 Forecast < or > Start of monitoring period	Monitoring Data (total, average, or point in time)	Change
High Density Residential land	32.6	39.6	**Up**
Commercial land	n/a	78.6	**n/a**
Efficiency Measures		Various beginning dates	
Downtown (post 2013)	1,003 dwellings* Amount of additional dwellings above the average	679 dwellings 12/2012- mid-2021 issued building permits	**On pace**
R-2 Zone density change	566 dwellings* Amount of additional dwellings above the average	304 dwellings 2017- mid-2021 issued building permits	**On pace**
Re-designation to LDR	1,833 dwellings* Specific sites identified	71 dwellings 12/2012- mid-2021 issued building permits	**Below pace**
Affordable Housing Land Bank Sites	55 dwellings (MDR)* Specific sites identified	101 dwellings (MDR) 138 dwellings (LDR) 12/2012- mid-2021 issued building permits	**Forecast met**
Accessory Dwellings	84 dwellings* Amount of additional dwellings above the average	21 dwellings 7/2018- mid-2021 issued building permits	**TBD**
Land Developed for Housing		12/2012- mid-2021 issued building permits	
Low Density Residential Land	8,853 dwellings* (2,213 acres)	2,553 dwellings 391 acres 18% of forecast land capacity used	**Below pace**
Medium Density Residential Land	3,231 dwellings* (302 acres)	1,440 dwellings 77 acres 27% of forecast land capacity used	**On pace**
High Density Residential Land	1,223 dwellings* (57 acres)	1,413 dwellings 42 acres 73% of forecast land capacity used	**Above pace**
Commercial Land	1,877 dwellings* (87 acres)	2,314 dwellings 33 acres 38% of forecast land capacity used	**Above pace** (dwellings) **On pace** (acreage)

Employment Development

	Adopted* 2012-2032 Forecast < Or > Start of monitoring period	Monitoring Data (total, average, or point in time)	Change
Efficiency Measures		2013- mid-2021 issued building permits	
Downtown Programs	18 acres* Additional development above the average	4 acres	**Below pace**
E-1 Campus Employment Zone	48 acres* Additional commercial development	1 acre	**Below pace**
E-2 Mixed Use Employment Zone	54 acres* Additional commercial development	0 acres	**Below pace**
Re-designation to Commercial	8 acres* Specific site identified	0 acres	-
Brownfield Assessment Program	45 acres* Specific number of industrial acres identified	0 acres	**Below pace**
Land Developed for Employment Uses		2013- mid-2021 issued building permits	
Commercial land	256 acres*	60 acres 23% of forecast land capacity used	**Mixed**
Industrial land (all site sizes)	1,148 acres*	118 acres 10% of forecast land capacity used	**Below pace**
10 acres or greater in size	818 acres* Includes acres in UGB expansion area (Clear Lake)	0 acres Half of this land is unannexed (Clear Lake)	**Below pace**
Residential land	53 acres (all vacant land) 34 Low Density* 11 Medium Density* 8 High Density*	15 acres 2 Low Density 10 Medium Density 3 High Density (Developed land)	**Mixed**

Other Metrics: Public Land Demands

	Adopted* 2012-2032 Forecast < Or > Start of monitoring period	Monitoring Data (total, average, or point in time)	Change
Public & Semi-Public Lands			
Park demand		To be determined at UGB analysis	
Utilities demand		To be determined at UGB analysis	
Other Public Uses demand (e.g., schools)		To be determined at UGB analysis	

Photo by City of Eugene staff.

K. Appendix: References, Definitions, Glossary

Adopted Forecast Many of the charts include an Adopted Forecast. The "Adopted Forecast (2012-2032)" is the adopted estimate (e.g., of new dwellings) or assumption (e.g., density of new housing) projected for the 2012-2032 planning period. The Adopted Forecast can be a total for 20 years or an average over 20 years. The Adopted Forecast is from the City of Eugene's Planning and Development Department's adopted Envision Eugene Land Sufficiency Model (2017) and as adopted in the Envision Eugene Residential and Employment Land Supply Studies 2012-2032.

Affordable housing (sometimes called "income qualified housing") in this report refers to housing that is set aside for households earning no more than 80% of the Area Median Income. Different affordable housing efficiency measures may have different income caps.

Average In this report the average is typically expressed as the average expected over the planning period or achieved over the monitoring period. Many of the building permit charts include an "average," such as an average line or an annual average over the monitoring period. For building permits, the average is calculated for full year data only so that the average is not artificially low.

Buildable Lands Inventory (BLI) The Buildable Lands Inventory (BLI) assesses the supply of land within the city's UGB for development capacity, categorizing land by its development potential. The BLI land categories are:

> **Vacant or Undeveloped** land has little to no improvements and is not fully Committed or Protected.

Partially Vacant land has development that meets a certain threshold in size and has room for more development.

Developed land contains development and does not have room for more development and is not fully Committed or Protected.

Committed land is devoted to special uses like parks, schools, government offices, cemeteries, and rights-of-way and therefore has no development or redevelopment potential.

Protected land is reserved to protect natural resources or because of natural hazards and therefore is assumed to have no development or redevelopment potential.

See Appendix I: Buildable Lands Inventory Update Summary for complete definitions.

The **adopted BLI (2012-2032)** model was run in August of 2012, and then was updated in May 2013 to reflect new development that had occurred between the first model run and May 2013. Rather than starting with May 2013 data, to count an entire year's worth of data in monitoring results and reduce error, the monitoring results discussed in this report use a copy of the adopted BLI that rolled back those updates. The monitoring copy of the BLI reflects development that had been issued as of January 2013 so that generally (unless otherwise noted) any development after that date would be included in the monitoring results and counted towards meeting the housing need forecast, any development before January 2013 is assumed already reflected on the BLI with a few exceptions.

The land model was rerun in 2021 to create a monitoring snapshot of the status of the BLI at the end of the monitoring period (e.g., "**2021 BLI**"). This preliminary estimate and 2021 BLI are provided for the purposes of monitoring and are not intended to be adopted by the City such as in association with any new UGB analysis.

BLI plan designation (or just "plan designation") In this report, the BLI plan designation refers to the comprehensive plan designation that was *assumed* for each parcel at the time the buildable land inventories were developed for the adopted Envision Eugene Residential and Employment Land Supply Studies 2012-2032. The assumed plan designation was identified at that time for the purposes of developing the BLI and long-range planning only, the BLI plan designation does not imply that it is the official plan designation of a parcel, rather it is an estimate derived from the official Eugene-Springfield Metropolitan General Area Plan (Metro Plan) land use diagram. For reporting purposes some Metro Plan designations were combined. For instance, High Density Residential Mixed Use was combined into High Density Residential, and all Industrial type plan designations (Light, Medium, Heavy and Special Heavy Industrial) were combined into Industrial.

Most charts report by the combined plan designations in the middle column in this table. Some charts report on plan designation at the even higher level of plan designation categories in the first column:

Land Use Categorization for Plan Designation

Plan Designation categories	Plan Designation reporting groups	2012-2032 BLI Plan Designations from Metro Plan
Residential	Low Density Residential	Low Density Residential
	Medium Density Residential	Medium Density Residential
		Medium Density Residential Mixed Use
	High Density Residential	High Density Residential
		High Density Residential Mixed Use
Commercial	Commercial	Commercial
		Commercial Mixed Use
		Mixed Use
		Major Retail Center
Industrial	Industrial	Campus Industrial
		Light Medium Industrial
		Heavy Industrial
		Special Heavy Industrial
Government & Education	Government & Education	University Research
		Government & Education
Parks & Open Space	Parks & Open Space	Parks and Open Space
		Parks and Open Space Mixed Use
		Natural Resource

Efficiency Measures Efficiency measures are actions the City takes to facilitate development that uses land more efficiently than would have occurred without these actions, based on historical trends. Efficiency measures such as changes to the land use regulations to remove development barriers or providing financial incentives, increase the expected capacity of land for additional housing or jobs development beyond what is likely to occur if the City does not make these changes.

Monitoring Period While monitoring data will be collected throughout the entire 20 year adopted planning period (2012-2032), for the purposes of this report the monitoring period is officially the beginning of the planning period (2012) to mid-2021. However, the monitoring period in this report sometimes references a slightly different time frame because of the differences in the availability of data. For instance, as of the writing of this report Eugene's job data was available up to 2018 so this set of monitoring data is 2012-2018. (See the Monitoring Period section under Appendix B: Collection and Reporting System).

Trend Many of the building permit charts include a "trend." The "trend (year x – year x)" is the projected amount (e.g., of new dwellings) or projected average (e.g., average density) for the entire 20-year planning period *if* the development pattern experienced during the monitoring years is continued for the rest of the planning period, to 2032. The trend calculation excludes partial years because there is not a full year's worth of data (e.g., partial year permit data for 2012 and 2021), this avoids an artificially low trend but also means that some data is not being included in the trend estimate.

UGB Analysis This refers to the previous analysis that was completed in association with Eugene's adopted urban growth boundary. The adopted UGB analysis and associated assumptions and estimates for the 20-year planning period are contained in the Envision Eugene Residential Land Supply Study (2012-2032) and the Envision Eugene Employment Land Supply Study (2012-2032). The studies are broken into several parts including buildable lands inventories, housing needs analysis, employment opportunities analysis, efficiency measures and UGB expansion, and are available at https://www.eugene-or.gov/848/Studies-and-Adopted-Plans.

UGB Land Supply and Demand Model Technical spreadsheets that include the assumptions used to estimate the sufficiency of Eugene's land supply for 20 years. Compares the results of the Buildable Lands inventory spatial model to the projected land demands. The **Envision Eugene Land Sufficiency Model (2017)**, was used for the previous UGB analysis.

Zoning Land in Eugene is zoned to provide areas suitable for certain types of development. Each zone provides a set of regulations governing the uses, lot size, building setbacks, height, and other development regulations. However, most of the analysis in this report is provided according to the BLI Plan Designation of the land. The plan designation is the City's long-term plan for what type of development and land uses the land is suitable for and therefore the plan designation is used in long-range planning instead of the zone. Typically, property is zoned to implement the planned land uses, but in some cases the zone and the plan designation of a property do not match.