

GROWTH MONITORING

PREPARING FOR CHANGE WITH BETTER DATA

Envision Eugene Comprehensive Growth Monitoring Report 2012-2021
City Council, June 8, 2022

envision
EUGENE

1

Meeting Agenda

- Background
- Overall lessons learned
- **Topic takeaways from the Report/Appendices**
- **Recommendations**
- **Emerging Issues**
- Next Steps
- Dashboard sneak peek!
- Questions

envision
EUGENE

2

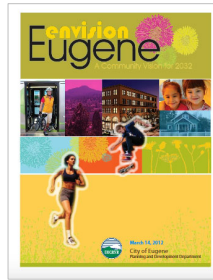
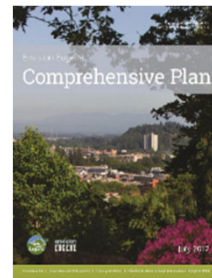
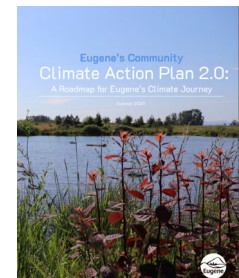
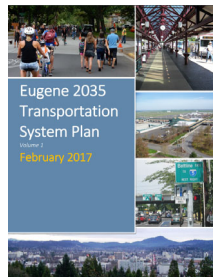
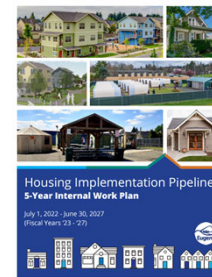
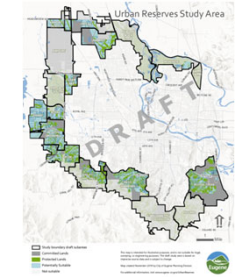
Background

Foundation

- Envision Eugene Recommendation
- Comprehensive Plan

Related projects & programs

- Climate Action Plan 2.0
- Transportation planning
- Consolidated Plan
- Smart Cities
- Triple Bottom Line
- Housing Implementation Pipeline
- Urban Reserves & UGB analysis



3

Background- Data & Report Review

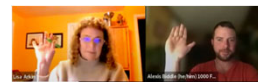
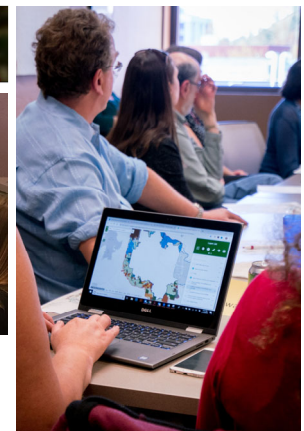
Envision Eugene Technical Advisory Committee

- 25 monitoring meetings
- Unanimous recommendation to forward report

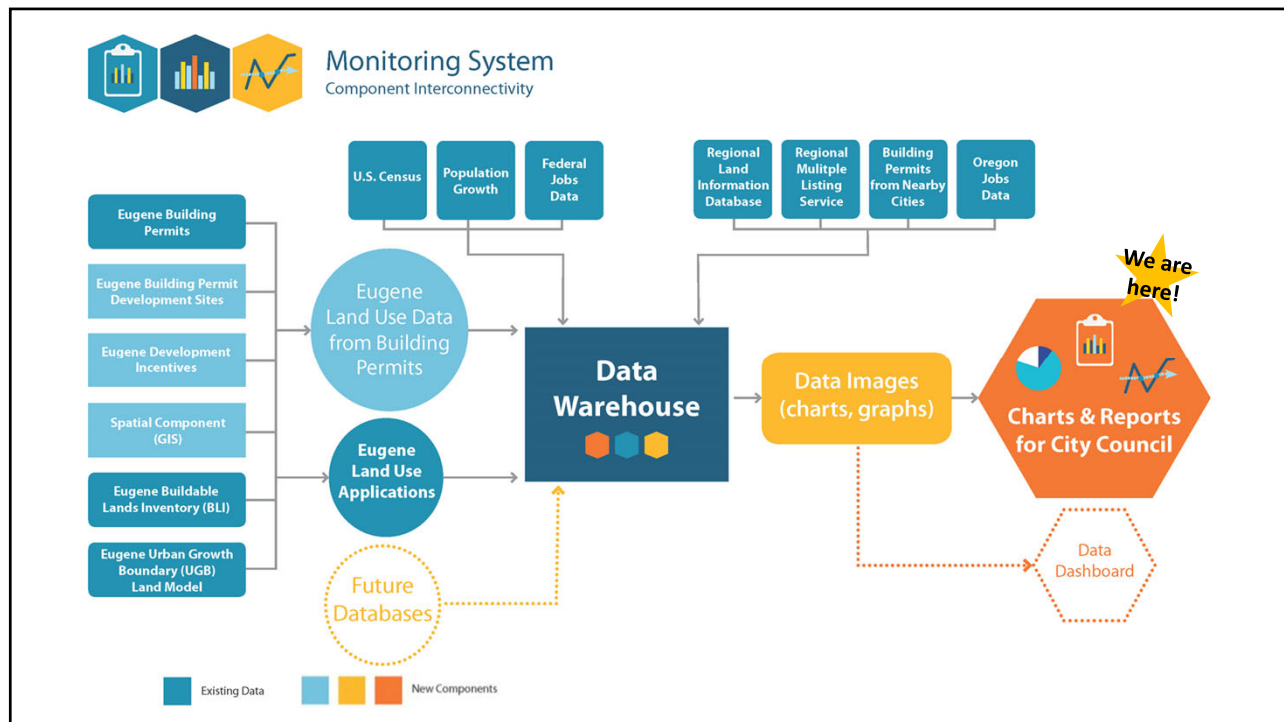
Planning Commission

- April 12, 2022 work session

EETAC voting compilation



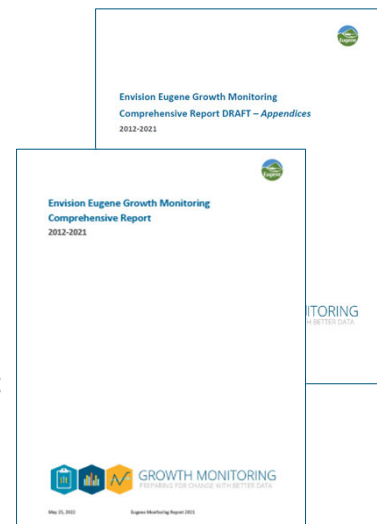
4



5

Overall Lessons Learned

- 8.5 years of monitoring, limited conclusions
- Monitoring compares data
 - research, policy discussion will be needed
 - UGB analysis
- Patience! Foundation for future
- Perfect is the enemy of good
- Anomalies: recessions, housing cycles, a pandemic
- Totals tell one story, details another



envision
EUGENE

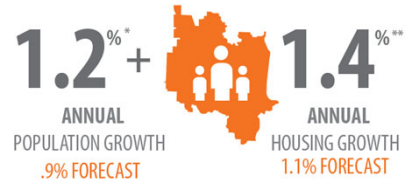
6

Population

- Takeaways:
 - Faster than expected (A)*
 - County in-migration more from other states than in-state
 - Housing faster than population
- New forecast (A)
 - Slowing, then slower
 - 2027 deaths outpace births
 - But, in-migration = net growth
 - Older ages increase
 - 20s maintain largest share

17,291

NEW EUGENEANS 2012-2021
34,000 FORECAST FOR 2012-2032



2040
to 2070

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

*(A) means assumptions adopted with previous UGB analysis

envision
EUGENE

7

Households



- Takeaways:
 - Minimal change to household size (A) and composition
 - Increase in Hispanic or Latino/a/x population
 - Owner and renter households remain at about 50/50 split
 - Smaller % of people living in group quarters (A)
 - Vacancy rate is low (A)

envision
EUGENE

8

Affordability

- Takeaways:
 - Poverty level decreased
 - 31% increase median household income
 - 32% increase median gross rent
 - Median sales price (2012-2021)
 - 119% increase single-family dwellings
 - 96% increase 2-4 dwellings
 - 286% increase 5+ dwellings
 - Cost-burdened households slightly decreased
 - Shortage of dwellings affordable to various incomes



envision
EUGENE

9

Jobs

- Takeaways:
 - Grew faster than expected (A) (pre-COVID-19)
 - Jobs mix matches forecast for new jobs (A)
 - Eugene-specific jobs data lags
 - COVID-19 impacts TBD
- New forecast
 - County jobs forecast slowing 2020-2030

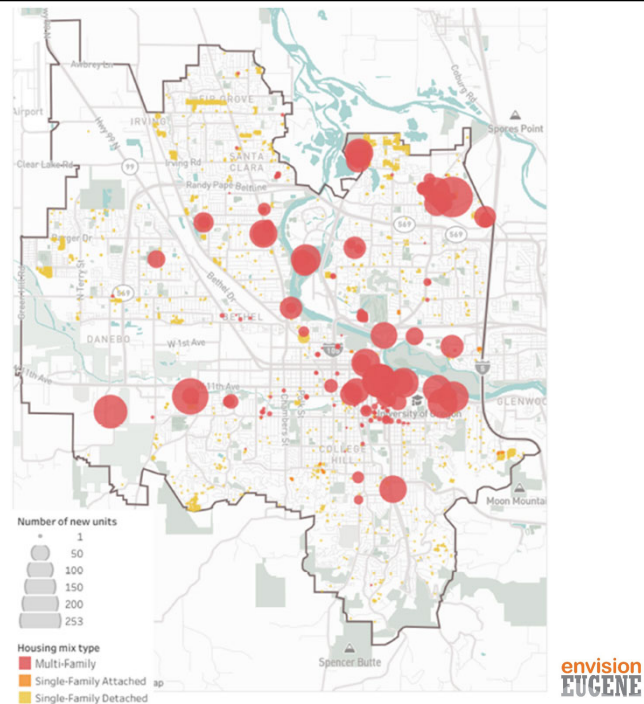


envision
EUGENE

10

Housing Development

- Takeaways:
 - Housing happened all over the city



11

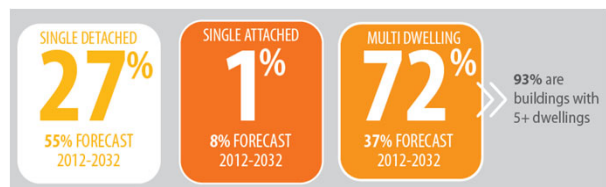
Housing Development

- Takeaways- dwellings/buildings:
 - 53% of forecast met (A)
 - Mix differs, but housing cycles (A)
 - Denser, but different method (A)
 - Highest- Commercial, 5+ buildings
 - Some land types lacking data
 - Efficiency measure totals on pace (A)
 - On pace: Multi-family downtown, accessory dwellings
 - Off pace/close: Low density, MUPTE, medium density

NEW DWELLINGS

New DWELLINGS TOTAL* **8,011**

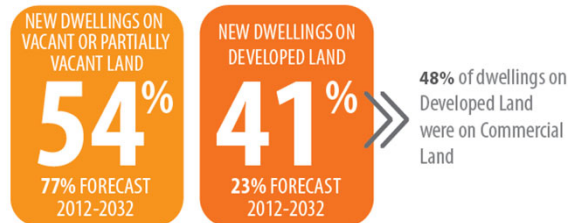
2012-2021 OUT OF 15,105 NEEDED BY 2032



12

Housing Development

- Takeaways- land:
 - More redevelopment (A)
 - Faster- Commercial and High Density Residential (A)
 - Slower- Low (18%) and Medium (26%) Density Residential (A)
 - 510 residential acres = 5,406 dwellings
 - 33 commercial acres = 2,314 dwellings

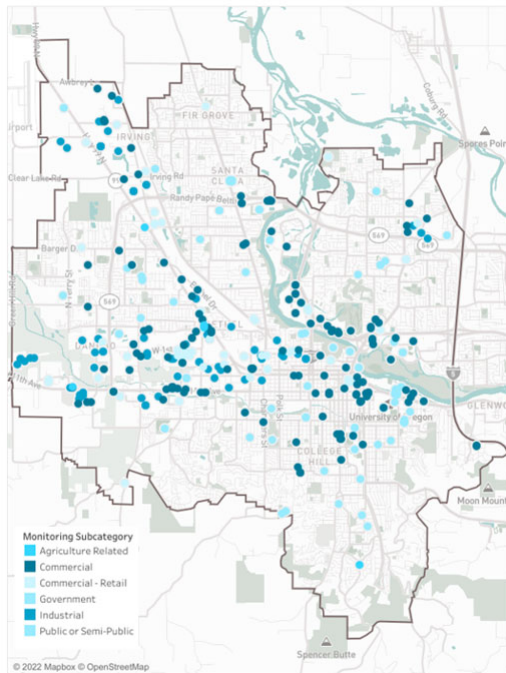


envision
EUGENE

13

Employment Development

- Takeaways:
 - Employment development happened all over the city
 - 327 employment permits and 2,495,132 net new building sq. ft.
 - No large industrial sites developed (A)
 - Employees per acre similar to Adopted Forecast (A)
 - Efficiency measures: acres developed well below forecast (A)



envision
EUGENE

14

Employment Development

- Takeaways – land:
 - 276 acres developed of 1,457 forecast (19%) **(A)**
 - More employment development on Developed land than expected **(A)**
 - ½ Industrial forecast acres in UGB expansion area and not served with utilities



envision
EUGENE

15

2021 Buildable Lands Snapshot*

Percent of buildable acres:

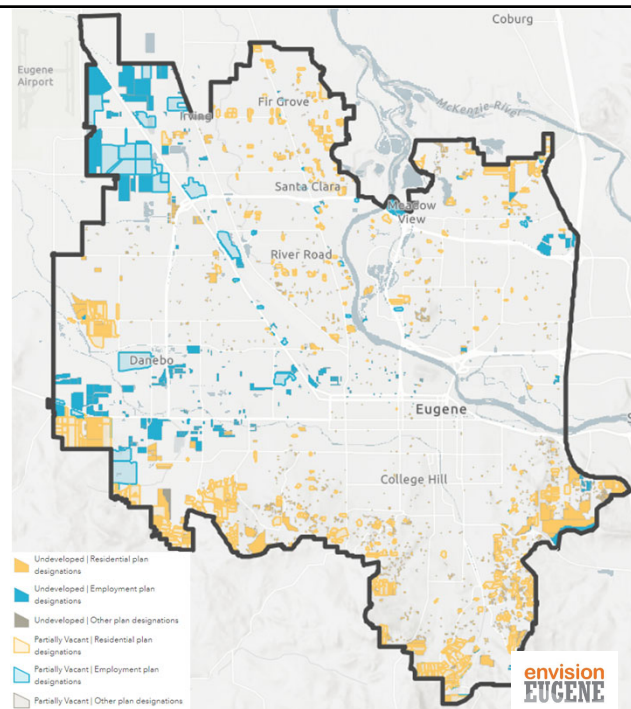
Residential lands (**yellow**)

- 43% on sloped lots
- 40% unannexed
- 54% on lots smaller than 5 acres

Employment lands (**blue**)

- 58% unannexed
 - 63% Industrial unannexed

*BLI as of January 2021



16

2021 Supply and Demand- Preliminary Estimate

If UGB analysis began today*... ballpark estimates:

- Dwellings
 - Capacity 12,000 dwellings (HB 2001 up to 3%)
 - Demand 15,700 (deficit in medium and high density residential)
- Employment
 - Capacity 18,700 employment development
 - Demand 24,800 jobs (deficit in commercial)
- These estimates will change!
 - New state statutes
 - Demand for other land needs
 - Update assumptions (forecasts, redevelopment, monitoring data)

*BLI as of January 2021

envision
EUGENE

17

Recommendations

Overarching

- Comprehensive UGB planning
- Efficiency measures
- Infrastructure needs

Housing

- HIP and underproduction
- Households with low incomes
- Middle housing
- UO enrollment

Employment

- Market changes



18

Emerging Issues

Overarching

- Climate migration
- 2020 Census, American Community Survey
- Climate Friendly & Equitable Communities
- Other cities w/universities
- Efficiency measures and Climate Action Plan
- New legislation
- Rezones

Housing

- Housing Production Strategies
- Regional Housing Needs
- Terminology
- Changes in ages
- Land characteristics

Employment

- Self-employment
- Remote working
- Employee density

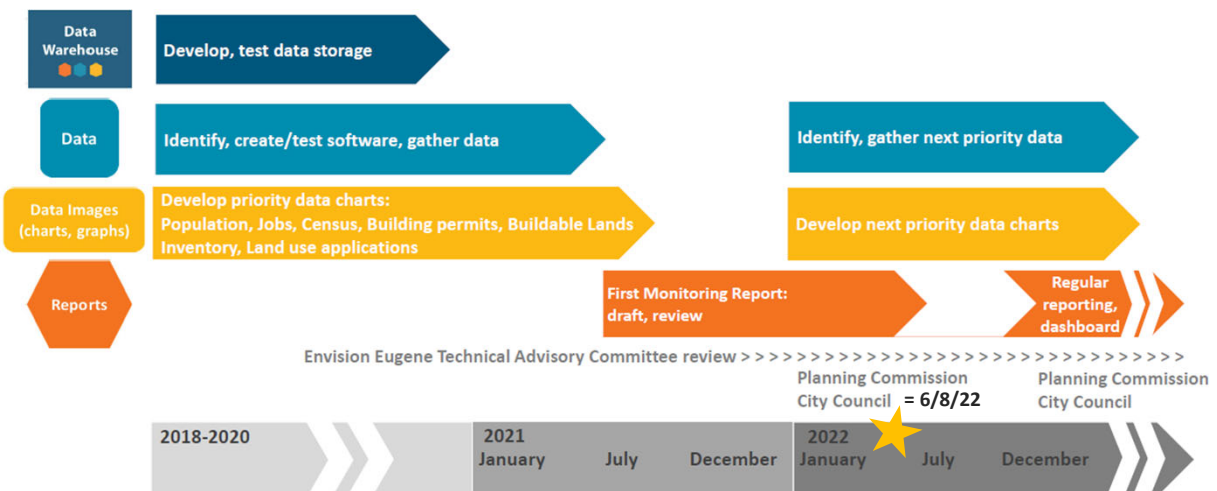
Photo provided by Eugene Sunday Streets staff.



19

Next Steps

Growth Monitoring Timeline Phase I - Program development



20

Next Steps

- UGB Analysis
 - Housing capacity analysis (+ all land needs)
 - Efficiency measures if needed
 - Expansion if needed

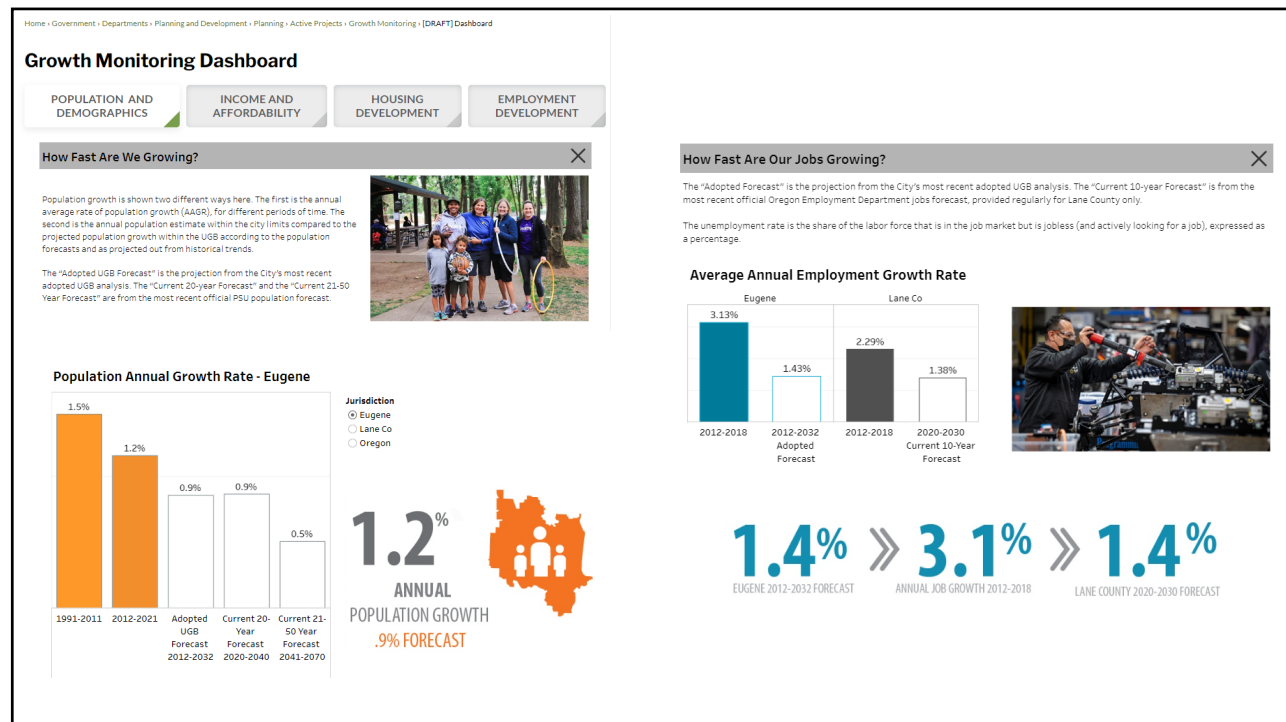
Monitoring and Planning for Growth



21

Dashboard Sneak Peek!

22



23

Questions?

- Thank you!





envision EUGENE

24