

DATE: January 22, 2021
 TO: City of Ashland Planning Commission and Housing and Human Services Commission
 CC: Brandon Goldman, City of Ashland
 FROM: Beth Goodman and Sadie DiNatale, ECONorthwest
 SUBJECT: Summary of Ashland’s Residential Land Needs Analysis

This memorandum summarizes Ashland’s residential land needs analysis.¹ ECONorthwest conducted this analysis using findings from Ashland’s buildable land inventory, which included an estimate of housing capacity within Ashland’s UGB, as well as results of Ashland’s 20-year housing forecast. This analysis is preliminary and will change as the project develops.

Ashland’s Preliminary Residential Land Needs Analysis

Ashland’s residential land needs analysis answers the question: Does Ashland have enough buildable land to accommodate its 20-year housing forecast for the 2021-2041 period?

To answer this question, this analysis compares Ashland’s capacity for dwelling units within the UGB to demand for housing in the UGB over the 20-year planning period.

As Exhibit 1 shows Ashland has a capacity for 2,764 dwelling units within its UGB.

About 25% of the 2,764 dwelling units are located in the Single-Family Residential Plan Designation (706 units).

Exhibit 1. Revised BLI and Capacity Estimate, Ashland UGB, 2020
 Source: City of Ashland Buildable Lands Inventory (2019) and City of Ashland building permit data.

Plan Designations (*and grouping of Plan Designations)	Net Buildable Acres	Dwelling Unit Capacity
Low Density Residential *	332	986
Suburban Residential	8	44
Normal NH	70	474
Multifamily Residential	42	349
High Density Residential	12	129
Croman Mill District	61	243
Commercial & Employment *	112	529

¹ ECONorthwest prepared this memorandum for the City of Ashland, as part of the larger Housing Capacity Analysis project. This project is funded by Oregon general fund dollars through the Department of Land Conservation and Development (DLCD). The contents of this document do not necessarily reflect the views or policies of the State of Oregon.

The official population forecast for Ashland over the 20-year period is for growth of about 1,961 people.

Based on the assumptions shown in Exhibit 2, Ashland will have demand for 858 new dwelling units over the 20-year period, with an annual average of 43 dwelling units.

Exhibit 2. Forecast of demand for new dwelling units, Ashland UGB, 2021 to 2041

Source: Calculations by ECONorthwest.

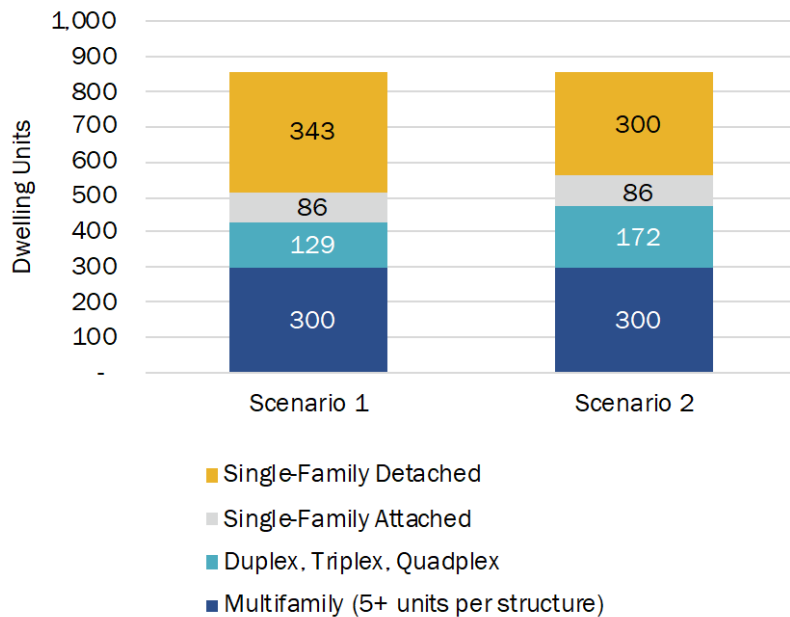
Variable	New Dwelling Units (2021-2041)
Change in persons	1,691
<i>minus</i> Change in persons in group quarters	58
<i>equals</i> Persons in households	1,633
Average household size	2.06
New occupied DU	793
<i>times</i> Vacancy rate	8.2%
<i>equals</i> Vacant dwelling units	65
Total new dwelling units (2021-2041)	858
Annual average of new dwelling units	43

This analysis forecasts future housing need by housing type. Exhibit 3 shows that this analysis evaluates two housing mix scenarios.

Scenario 1 reflects a larger share of single-family detached housing (40%) than Scenario 2 (35%). Scenario 2 reflects a larger share of plex housing (20%) compared to Scenario 1 (15%).

Exhibit 3. Housing Forecast by Housing Type, Scenario 1 and Scenario 2 Housing Mix, Ashland UGB, 2021 to 2041

Source: Summary by ECONorthwest.



Ashland’s previous HNA lumped single-family detached and attached together and all multifamily/plex housing together. Both categories represented 50% of the forecast of new units. Scenario 1 plans for a similar share of single-family housing as the previous HNA. Scenario 2 plans for a smaller share (45%).

Exhibit 4 and Exhibit 5 compare the capacity of existing buildable lands (see Exhibit 1) to demand for housing-by-housing type (see Exhibit 3), by Comprehensive Plan Designation.

Exhibit 4. Residential Capacity by Plan Designation Using Scenario 1, Ashland UGB, 2020-2021

Source: Calculations by ECONorthwest.

Plan Designations (*and grouping of Plan Designations)	Capacity (Dwelling Units)	Demand (Dwelling Units)	Capacity less Demand (Dwelling Units)
Low Density Residential *	986	247	739
Suburban Residential	44	18	26
Normal NH	474	240	234
Multifamily Residential	349	138	211
High Density Residential	129	95	34
Croman Mill District	243	34	209
Commercial & Employment *	529	86	443

Exhibit 5. Residential Capacity by Plan Designation Using Scenario 2, Ashland UGB, 2020-2021

Source: Calculations by ECONorthwest.

Plan Designations (*and grouping of Plan Designations)	Capacity (Dwelling Units)	Demand (Dwelling Units)	Capacity less Demand (Dwelling Units)
Low Density Residential *	986	222	764
Suburban Residential	44	18	26
Normal NH	474	231	243
Multifamily Residential	349	172	177
High Density Residential	129	95	34
Croman Mill District	243	34	209
Commercial & Employment *	529	86	443

In both scenarios, Ashland has more than enough capacity to accommodate growth over the 20-year period. However, Ashland has a limited surplus of capacity in its High-Density Residential Plan Designation, as it starts with only 12 acres of unconstrained vacant and partially vacant land in this Plan Designation. This, and other constraints on future development (such as annexation and serviceability of vacant lands), will be discussed in the Housing Capacity Analysis and the Housing Strategy.