
City of Roseburg

Housing Needs Analysis

June 2019

Prepared for:
City of Roseburg

FINAL REPORT

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Executive Summary

This report presents a housing needs analysis consistent with requirements of Statewide Planning Goal 10 and OAR 660-008. The methods used for this study generally follow the *Planning for Residential Growth* guidebook, published by the Oregon Transportation and Growth Management Program (1996).

The primary goals of the housing needs analysis were to (1) project the amount of land needed to accommodate the future housing needs of all types within the Roseburg Urban Growth Boundary (UGB), (2) evaluate the existing residential land supply within the Roseburg UGB to determine if it is adequate to meet that need, (3) to fulfill state planning requirements for a twenty-year supply of residential land, and (4) identify policy and programmatic options for the City to meet identified housing needs.

What are the key housing needs in Roseburg?

Following are several key issues identified in the housing needs analysis:

- **Roseburg’s housing market is strongly impacted by the housing market in Douglas County.** Roseburg’s population accounts for about 22% of Douglas County’s population. More than 4,900 Roseburg residents commute out of the City for work. Median household incomes for Roseburg residents are similar to median incomes in Douglas County, but less than median incomes in Oregon.

Home sales prices in Roseburg are higher than other areas of Douglas County (such as Myrtle Creek, Sutherlin, and Winston). Rental costs in Roseburg are higher than in Douglas County. Roseburg has a relatively small share of housing that is multifamily housing (about a quarter of the City’s housing stock) and has fewer vacant housing units than Douglas County.

Given these factors, Roseburg will continue to have demand for affordable lower-income and workforce housing.

- **Demographic and economic trends will drive demand for relatively affordable attached single-family housing and multifamily housing in Roseburg.** The key demographic trends that will affect Roseburg’s future housing needs are: (1) the aging of the Baby Boomers, (2) aging of the Millennials, and (3) continued growth in Latinx population.
 - *Baby Boomers.* By 2040, people 60 years and older will account for 36% of the population in Douglas County (up from 32% in 2012-2016). As the Baby Boomers age, growth of retirees will drive demand for housing types specific to seniors, such as small and easy-to-maintain dwellings, assisted living facilities, or age-restricted developments.
 - *Millennials.* Douglas County’s population forecast by age group shows Millennials will grow from about 19% of the County’s total population in 2020 to

about 24% of the population in 2040. Growth in this population will result in increased demand for both ownership and rental opportunities. Between 2019 and 2039, Millennials will be a key driver in demand for housing that is comparatively affordable and housing for families with children.

- *Latinx population.* Growth in the number of Latinx households will result in increased demand for housing of all types, both for ownership and rentals, with an emphasis on housing that is comparatively affordable. Latinx households are more likely to be larger than average, with more children and possibly with multigenerational households.
- **Roseburg has an existing lack of affordable housing.** Roseburg’s key challenge over the next 20 years is providing opportunities for development of relatively affordable housing of all types of housing, from lower-cost single-family housing to market-rate multifamily housing.
 - About 38% of Roseburg households cannot afford a two-bedroom apartment at HUD’s fair market rent level of \$760.
 - In 2018, a household needed to earn \$14.62 an hour to afford a two-bedroom rental unit in Douglas County.
 - Roseburg currently has a deficit of housing units that are affordable to households earning between \$10,000 and \$25,000 per year.
 - About 35% of Roseburg’s households are cost burdened, with 55% of renters and 20% of owners paying more than 30% of their income on housing.

How much growth is Roseburg planning for?

A 20-year population forecast (in this instance, 2019 to 2039) is the foundation for estimating the number of new dwelling units needed. Exhibit 1 shows a population forecast for Roseburg for the 2019 to 2039 period. It shows that Roseburg’s population will grow by about 5,515 people over the 20-year period.

Exhibit 1. Population Forecast, Roseburg, 2019-2039

Source: ECONorthwest based on Roseburg’s official 2015-2035 population forecast from the Oregon Population Forecast Program.

30,256	35,771	5,515	18% increase
Residents in 2019	Residents in 2039	New residents 2019 to 2039	0.84% AAGR

The housing needs analysis assumes that Roseburg’s population will grow by 5,515 people over the 2019 to 2039 period.

How much buildable residential land does Roseburg currently have?

Exhibit 2 shows buildable residential acres by plan designation, after excluding constrained and unbuildable land. The results show that Roseburg has about 1,358 net buildable acres in residential plan designations. Of this, about 73% are in tax lots classified as vacant, and 27% are in tax lots classified as partially vacant. A majority of Roseburg’s buildable acres are in low density residential, comprising 65% (885 acres) of total buildable lands.

Exhibit 2. Buildable acres in vacant and partially vacant tax lots by plan designation, Roseburg UGB, 2018

Source: Douglas County, ECONorthwest analysis.

Plan Designation	Total Buildable acres	Buildable acres on vacant lots	Buildable acres on partially vacant lots
Low Density Residential	885	638	247
Medium Density Residential	155	111	44
High Density Residential	64	34	30
Residential Open Space	58	15	43
Commercial	70	70	0
Industrial	125	125	0
Total	1,358	993	365

How much housing will Roseburg need?

Roseburg will need to provide opportunity for about 2,678 new dwelling units to accommodate forecast population growth between 2019 and 2039.

About 1,607 dwelling units (60%) will be single-family detached housing types, which includes manufactured dwellings. About 268 (10%) will be single-family attached housing units and 803 (30%) will be multifamily housing units.

This mix represents a shift from the existing mix of housing, in which about 70% of the housing stock in single-family detached housing. The shift in mix is in response to the need for a wider range of relatively affordable housing types, including housing types such as duplexes, townhouses, and apartments. In addition, Roseburg has need for relatively affordable smaller single-family detached housing.

How much land will be required for housing?

Exhibit 3 shows that Roseburg’s 1,358 acres of vacant land has the capacity to accommodate 3,749 new dwelling units. Roseburg’s forecast for demand is for 2,678 new dwelling units, meaning Roseburg has a surplus of capacity for 1,091 dwelling units over the 2019 to 2039 period.

Exhibit 3 shows that Roseburg has a deficit of capacity in all residential plan designations:

- **Low-Density Residential:** Roseburg has a surplus of capacity for about 1,020 dwelling units, or 352 gross acres of land to accommodate growth over the 2019-2039 period.
- **Medium-Density Residential:** Roseburg has a surplus of capacity for about 43 dwelling units, or 11 gross acres of land to accommodate growth.
- **High-Density Residential:** Roseburg has a deficit of 24 acres, but when land for group quarters is deducted.

Roseburg does not have enough land to accommodate high density residential growth over the 20-year period.

Exhibit 3. Comparison of capacity of existing residential land with demand for new dwelling units and land deficit, Roseburg UGB, 2019-2039

Source: Buildable Lands Inventory; Calculations by ECONorthwest. Note: DU is dwelling unit.

Plan Designation	Capacity (Dwelling Units)	Demand (Dwelling Units)	Remaining Capacity (Dwelling Units)	Land Surplus or (Deficit) Gross Acres
Low Density Residential	2,567	1,547	1,020	352
Medium Density Residential	604	561	43	11
High Density Residential	578	550	28	3
Group Quarters in High Density Residential				(24)

What are the Key Findings of the Housing Needs Analysis?

The key findings of the Roseburg Housing Needs Analysis are that:

- **Roseburg’s population is forecasted to grow at a slower rate than in the past.** Population growth results in Roseburg needing to plan for 2,678 new dwelling units. Of those new housing units, Roseburg will plan for more single-family attached and multifamily dwelling units in the future to meet the City’s housing needs.
- **Roseburg has a deficit of land for High Density Residential.** This deficit can be addressed in several ways: re-designating land from Low or Medium Density Residential to High Density Residential, increasing the densities allowed and achievable in High Density Residential, providing other opportunities for development of multifamily housing in Commercial or other mixed use zones, or all of these options.
- **Roseburg’s development occurred at relatively low densities in the 2000 to 2018 period.** Some of the low density can be explained by the fact that much of Roseburg’s vacant Low Density land is on slopes that are decreasing achievable densities.
- **Roseburg’s Low Density Residential land base has constraints to development.** More than one-quarter of Roseburg’s vacant land in Low Density Residential is partially vacant (247 of 885 acres). In addition, two-thirds of Roseburg’s vacant and partially vacant buildable land in Low Density Residential is on slopes of 12% to 24.9% (568 or 885 acres). Development of partially vacant land can be challenging for a number of reasons, including that it occurs when landowners are ready to subdivide and in cases

where partially vacant land is on a relatively small lot (i.e., a lot smaller than five or ten acres), the amount of residential development that can occur is relatively small (and generally more expensive to build). Development on land with moderate slopes is also often more expensive because it generally occurs as lower densities (fewer dwelling units per acre) and on land without urban infrastructure where it may be more expensive to serve because of requirements for road construction or requirements for special equipment (such as pump stations). Developing new housing in these areas may be more expensive, providing fewer opportunities for development of market-rate affordable housing affordable to middle-income households. The Housing Strategy describes actions that the City can take to overcome these barriers, such as allowing a wider range of single-family housing development (such as cottage clusters), implementing a land swap of sloped land within the UGB for flat land outside of the UGB, increasing allowable densities (or setting minimum densities) and removing other barriers to development.

- **Roseburg’s mixed-use zone is industrial.** While Roseburg allows housing in some conditions in commercial zones, the City’s mixed-use zone is a mixture of industrial and residential development. This combination can lead to a conflict of uses between industrial and housing, which may discourage development of mixed use housing.
- **Roseburg should take actions to address substandard housing.** Lack of redevelopment, slow new house development, and financial barriers have impacted the quality of housing in Roseburg. Roseburg can help address housing quality concerns in a number of ways: (1) by identifying and maintaining a database of blighted homes, (2) by supporting rehabilitation with financial incentives, and (3) by working with developers and housing providers to alleviate zoning barriers to rehabilitation.
- **Roseburg should take actions to address homelessness.** As of 2019, 204 households experienced homelessness in Roseburg. Most (74%) households experiencing homelessness have at least one household member with a disabling condition. Roseburg can address homelessness by providing opportunities to increase the supply of government-assisted affordable housing.

1. Introduction

This report presents Roseburg’s Housing Needs Analysis for the 2019 to 2039 period. It is intended to comply with statewide planning policies that govern planning for housing and residential development, including Goal 10 (Housing) and OAR 660 Division 8. The methods used for this study generally follow the *Planning for Residential Growth* guidebook, published by the Oregon Transportation and Growth Management Program (1996).

The City of Roseburg has not updated its residential Comprehensive Plan policies since 1984. The city has changed considerably since then. Roseburg grew from 16,644 people in 1980 to 24,015 people in 2017. This is an addition of 7,371 people or 44% growth. In this time Roseburg’s population has grown a little older on average and households’ sizes have gotten smaller. At the same time, housing costs have risen faster than incomes, making housing less affordable.

This report provides Roseburg with a factual basis to update the Housing Element of the City’s Comprehensive Plan and to support future planning efforts related to housing and options for addressing unmet housing needs in Roseburg. This report provides information that informs future planning efforts, including development and redevelopment. This report provides the City with information about the housing market in Roseburg and describes the factors that will affect future housing demand in Roseburg, such as changing demographics. This report was developed at the same time as the *Roseburg Homeless Population Study*¹, and provides information to help decisionmakers understand the wide range of housing needs in Roseburg.

Framework for a Housing Needs Analysis

Economists view housing as a bundle of services for which people are willing to pay: shelter certainly, but also proximity to other attractions (job, shopping, recreation), amenities (type and quality of fixtures and appliances, landscaping, views), prestige, and access to public services (quality of schools). Because it is impossible to maximize all these services and simultaneously minimize costs, households must, and do, make tradeoffs. What they can get for their money is influenced both by economic forces and government policy. Moreover, different households will value what they can get differently. They will have different preferences, which in turn are a function of many factors like income, age of household head, number of people and children in the household, number of workers and job locations, number of automobiles, and so on.

Thus, housing choices of individual households are influenced in complex ways by dozens of factors and the housing market in Douglas County and Roseburg are the result of the individual decisions of thousands of households. These points help to underscore the complexity of projecting what types of housing will be built in Roseburg between 2019 and 2039.

¹ Kristina Smock Consulting prepared the *Roseburg Homeless Population Study* for the City of Roseburg Community Development Department (2019).

The complex nature of the housing market, demonstrated by the unprecedented boom and bust during the past decade, does not eliminate the need for some type of forecast of future housing demand and need. This includes resulting implications for land demand and consumption. Such forecasts are inherently uncertain. Their usefulness for public policy often derives more from the explanation of their underlying assumptions about the dynamics of markets and policies than from the specific estimates of future demand and need. Thus, we start our housing analysis with a framework for thinking about housing and residential markets, and how public policy affects those markets.

Statewide Planning Goal 10

- ◆ The passage of the Oregon Land Use Planning Act of 1974 (ORS Chapter 197) established the Land Conservation and Development Commission (LCDC) and the Department of Land Conservation and Development (DLCD). The Act required the Commission to develop and adopt a set of statewide planning goals. Goal 10 addresses housing in Oregon and provides guidelines for local governments to follow in developing their local comprehensive land use plans and implementing policies.

At a minimum, local housing policies must meet the requirements of Goal 10 and the statutes and administrative rules that implement it (ORS 197.295 to 197.314, ORS 197.475 to 197.490, and OAR 600-008).² Goal 10 requires incorporated cities to complete an inventory of buildable residential lands. Goal 10 also requires cities to encourage the numbers of housing units in price and rent ranges commensurate with the financial capabilities of its households.

Goal 10 defines needed housing types as “all housing on land zoned for residential use or mixed residential and commercial use that is determined to meet the need shown for housing within an urban growth boundary at price ranges and rent levels that are affordable to households within the county with a variety of incomes, including but not limited to households with low incomes, very low incomes and extremely low incomes.” ORS 197.303 defines needed housing types as:

- (a) Housing that includes, but is not limited to, attached and detached single-family housing and multiple family housing for both owner and renter occupancy.
- (b) Government assisted housing.³
- (c) Mobile home or manufactured dwelling parks as provided in ORS 197.475 to 197.490.
- (d) Manufactured homes on individual lots planned and zoned for single-family residential use that are in addition to lots within designated manufactured dwelling subdivisions.
- (e) Housing for farmworkers.

DLCD provides guidance on conducting a housing needs analysis in the document *Planning for Residential Growth: A Workbook for Oregon's Urban Areas*, referred to as the Workbook.

² ORS 197.296 only applies to cities with populations over 25,000, which includes Roseburg based on PSU's estimate of 30,092 people within the Roseburg UGB in 2018.

³ Government assisted housing can be any housing type listed in ORS 197.303 (a), (c), or (d).

Roseburg must identify needs for all of the housing types listed above as well as adopt policies that increase the likelihood that needed housing types will be developed. This housing needs analysis was developed to meet the requirements of Goal 10 and its implementing administrative rules and statutes.

Housing Affordability Key Terms

This report discusses housing affordability. It distinguishes between two types of affordable housing: (1) housing affordable to very low-income and extremely low-income households and (2) housing affordable to low-income and middle-income households. The following describes these households, based on information from the Roseburg Housing Needs Analysis.

- **Very low-income and extremely low-income** households are those who have an income of 50% or less of Douglas County Median Family Income (MFI)⁴ which is an annual household income of \$26,050 or less. About 33% of Roseburg's households fit into this category. They can afford a monthly housing cost of \$651 or less.⁵ Development of housing affordable to households at this income level is generally accomplished through the development of government-subsidized income-restricted housing.
- **Low-income and middle-income households** are those who have income of 50% to 120% of Douglas County's MFI or income between \$26,050 to \$62,520. About 33% of Roseburg's households fit into this category. They can afford a monthly housing cost of \$651 to \$1,563. The private housing market may develop housing affordable to households in this group, especially for the higher income households in the group.

Public Process

At the broadest level, the purpose of the project was to understand how much Roseburg will grow over the next 20 years. The project can be broken into two components (1) technical analysis, and (2) housing strategies. Both benefit from public input. The technical analysis required a broad range of assumptions that influence the outcomes; the housing strategy is a series of high-level policy choices that will affect Roseburg residents.

The intent of the public process was to establish broad public engagement throughout the project as work occurs. Public engagement was accomplished through various avenues. We discuss the two primary avenues below.

⁴ Median Family Income is determined by the U.S. Department of Housing and Urban Development. In 2018, Douglas County's MFI was \$52,100.

⁵ This assumes that households pay less than 30% of their gross income on housing costs, including rent or mortgage, utilities, home insurance, and property taxes.

Project Advisory Committee Engagement

The City of Roseburg and ECONorthwest solicited public input from an ad-hoc Project Advisory Committee. The Project Advisory Committee met four times⁶ to discuss project assumptions, results, and implications. The project relied on the Project Advisory Committee to review draft products and provide input at key points (e.g. before recommendations and decisions were made and before draft work products were finalized).

The project required many assumptions and policy choices that the committee needed to vet and agree upon, as these choices affect current and future residents. In short, local review and community input were essential to developing a locally appropriate and politically viable housing needs analysis and housing strategy.

Public Engagement

The City of Roseburg and ECONorthwest solicited input from the general public at two public meetings. The first meeting, held on February 19, 2019, solicited comments on the preliminary results of the housing needs analysis. The second public meeting, held on May 21, 2019, solicited comments on the final results of the housing needs analysis and housing strategy.

Organization of this Report

The rest of this document is organized as follows:

- **Chapter 2. Residential Buildable Lands Inventory** presents the methodology and results of Roseburg's inventory of residential land.
- **Chapter 3. Historical and Recent Development Trends** summarizes the state, regional, and local housing market trends affecting Roseburg's housing market.
- **Chapter 4. Demographic and Other Factors Affecting Residential Development in Roseburg** presents factors that affect housing need in Roseburg, focusing on the key determinants of housing need: age, income, and household composition. This chapter also describes housing affordability in Roseburg relative to the larger region.
- **Chapter 5. Housing Need in Roseburg** presents the forecast for housing growth in Roseburg, describing housing need by density ranges and income levels.
- **Chapter 6. Residential Land Sufficiency within Roseburg** estimates Roseburg's residential land sufficiency needed to accommodate expected growth over the planning period.
- **Appendix A. Residential Buildable Lands Inventory** presents supplementary details for Chapter 2.
- **Appendix B. Roseburg Homeless Population Study** presents the City of Roseburg's report on homelessness, conducted by Kristina Smock Consulting.

⁶ Project Advisory Committee meeting dates: January 22, 2019; February 19, 2019; April 2, 2019; and May 21, 2019.

2. Residential Buildable Lands Inventory

The general structure of the standard method BLI analysis is based on the DLCD HB 2709 workbook *“Planning for Residential Growth – A Workbook for Oregon’s Urban Areas,”* which specifically addresses residential lands. The steps and sub-steps in the supply inventory are:

1. Calculate the gross vacant acres by plan designation, including fully vacant and partially vacant parcels.
2. Calculate gross buildable vacant acres by plan designation by subtracting unbuildable acres from total acres.
3. Calculate net buildable acres by plan designation, subtracting land for future public facilities from gross buildable vacant acres.
4. Calculate total net buildable acres by plan designation by adding redevelopable acres to net buildable acres.

The methods used for this study are consistent with many others completed by ECONorthwest that have been acknowledged by DLCD and LCDC. A detailed discussion of the methodology used in this study is provided in Appendix A. The BLI for Roseburg includes all residential land designated in the comprehensive plan within the Roseburg UGB. From a practical perspective, this means that all lands within tax lots identified by the Douglas County Assessor’s Office that fall within the UGB were inventoried. ECO used the most recent tax lot shapefile from the Douglas County for the analysis. The inventory then builds from the tax lot-level database to estimates of buildable land by plan designation.

Residential Buildable Land Inventory Results

Land Base

As defined above, the land base for the Roseburg residential BLI includes all tax lots in the urban growth boundary (UGB) in residential plan designations. Exhibit 4 shows the land base by generalized plan designation in the UGB.

There are 11,164 tax lots in the land base, accounting for 5,998 acres. There are 151 tax lots that include two designations such as low density residential and residential open space, and four tax lots that are split among three plan designations.

Exhibit 4. Land base by plan designation, Roseburg UGB, 2018

Plan Designation	Number of taxlots	Percent	Total taxlot acreage	Percent
Low Density Residential	6,500	57%	3,461	58%
Medium Density Residential	2,411	21%	856	14%
High Density Residential	674	6%	372	6%
Residential Open Space	53	0%	119	2%
Commercial	1,352	12%	757	13%
Industrial	333	3%	433	7%
Total	11,164	100%	5,998	100%

Source: Douglas County, ECONorthwest analysis

Note: Industrial land only includes areas that allow a mixture of industrial and residential uses.

The sum tax lots do not equal the total number of tax lots due to split plan designations.

Development Status

Exhibit 5 shows total acres in tax lots classified by development status. We used a rule-based classification (defined in the methods and definitions above) to define an initial development status. Then, we used a rapid visual assessment method to confirm this development status using aerial imagery.

Exhibit 5. Development status before constraints are applied, by plan designation, Roseburg UGB, 2018

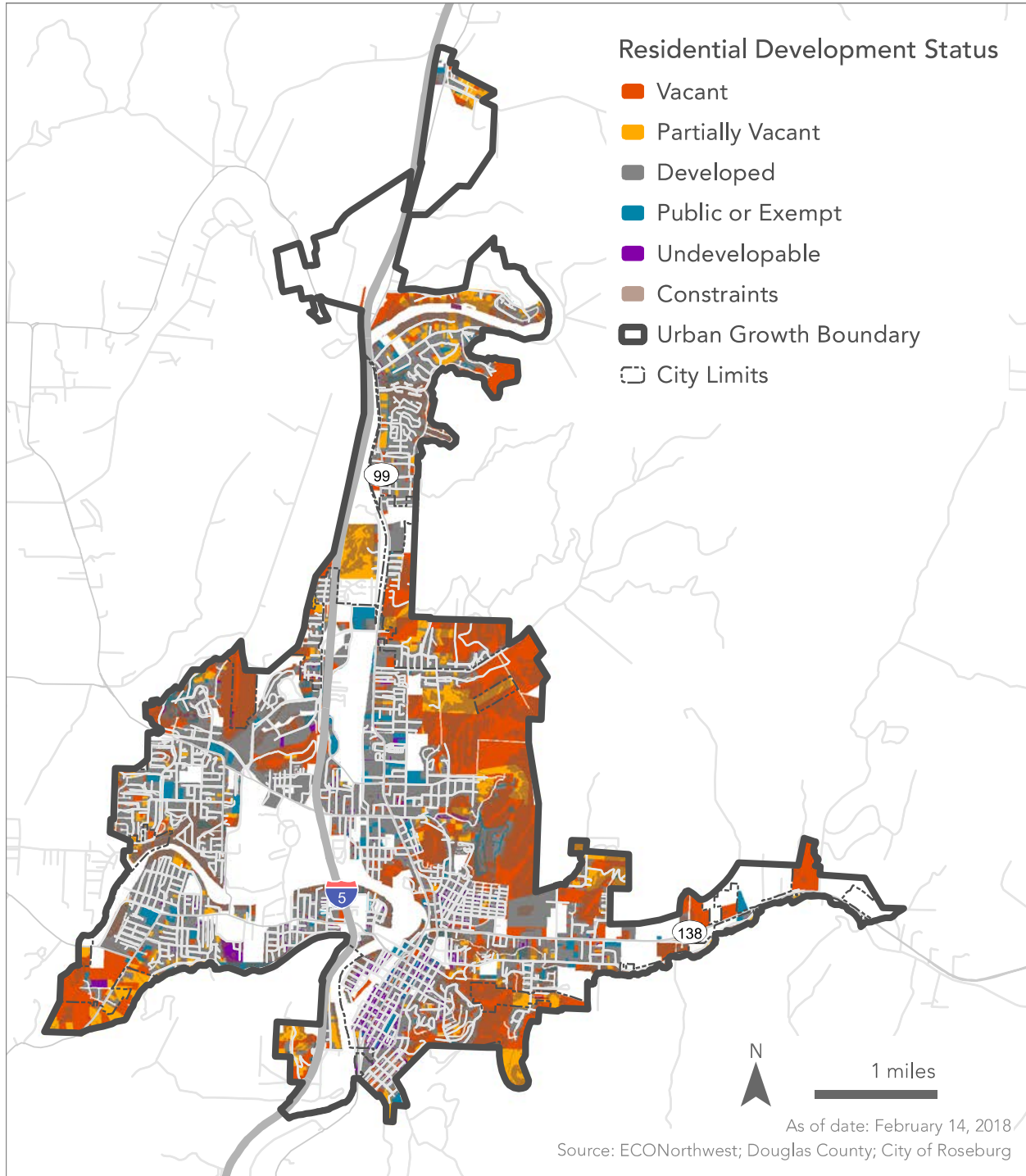
Plan Designation	Total acres on vacant taxlots	Total acres on partially vacant taxlots	Total committed acres		
			Developed	Undevelopable	Public or exempt
Low Density Residential	1,445	510	1,342	30	133
Medium Density Residential	187	73	523	31	41
High Density Residential	65	65	207	3	31
Residential Open Space	23	86	6	2	2
Commercial	95	0	550	21	91
Industrial	169	0	215	2	47
Total	1,985	735	2,843	90	345

Source: Douglas County, ECONorthwest analysis

Note: Industrial land only includes areas that allow a mixture of industrial and residential uses.

Roseburg Buildable Lands Inventory

Development Status



Vacant Buildable Land

Exhibit 8 shows buildable acres (i.e., acres in tax lots after constraints are deducted) for vacant and partially vacant land by plan designation. Of Roseburg’s 1,358 unconstrained buildable residential acres, about 73% are in tax lots classified as vacant, and 27% are in tax lots classified as partially vacant. Roseburg has about 1,104 buildable acres in residential designations, 855 acres of which is in Low Density Residential.

Exhibit 8. Buildable acres in vacant and partially vacant tax lots by plan designation, Roseburg UGB, 2018

Plan Designation	Total Buildable acres	Buildable acres on vacant lots	Buildable acres on partially vacant lots
Low Density Residential	885	638	247
Medium Density Residential	155	111	44
High Density Residential	64	34	30
Residential Open Space	58	15	43
Commercial	70	70	0
Industrial	125	125	0
Total	1,358	993	365

Source: Douglas County, ECONorthwest analysis

Note: Industrial land only includes areas that allow a mixture of industrial and residential uses.

Exhibit 8 includes buildable land with slopes below 25%. A substantial amount of Roseburg’s land is in areas with slopes that may make development more difficult and may limit potential density in these areas. Exhibit 9 shows that 649 acres of vacant land in Roseburg (59% of buildable residential land) is on land with a slope of 12% to 24.9%. Of this, 568 acres is in Low Density Residential.

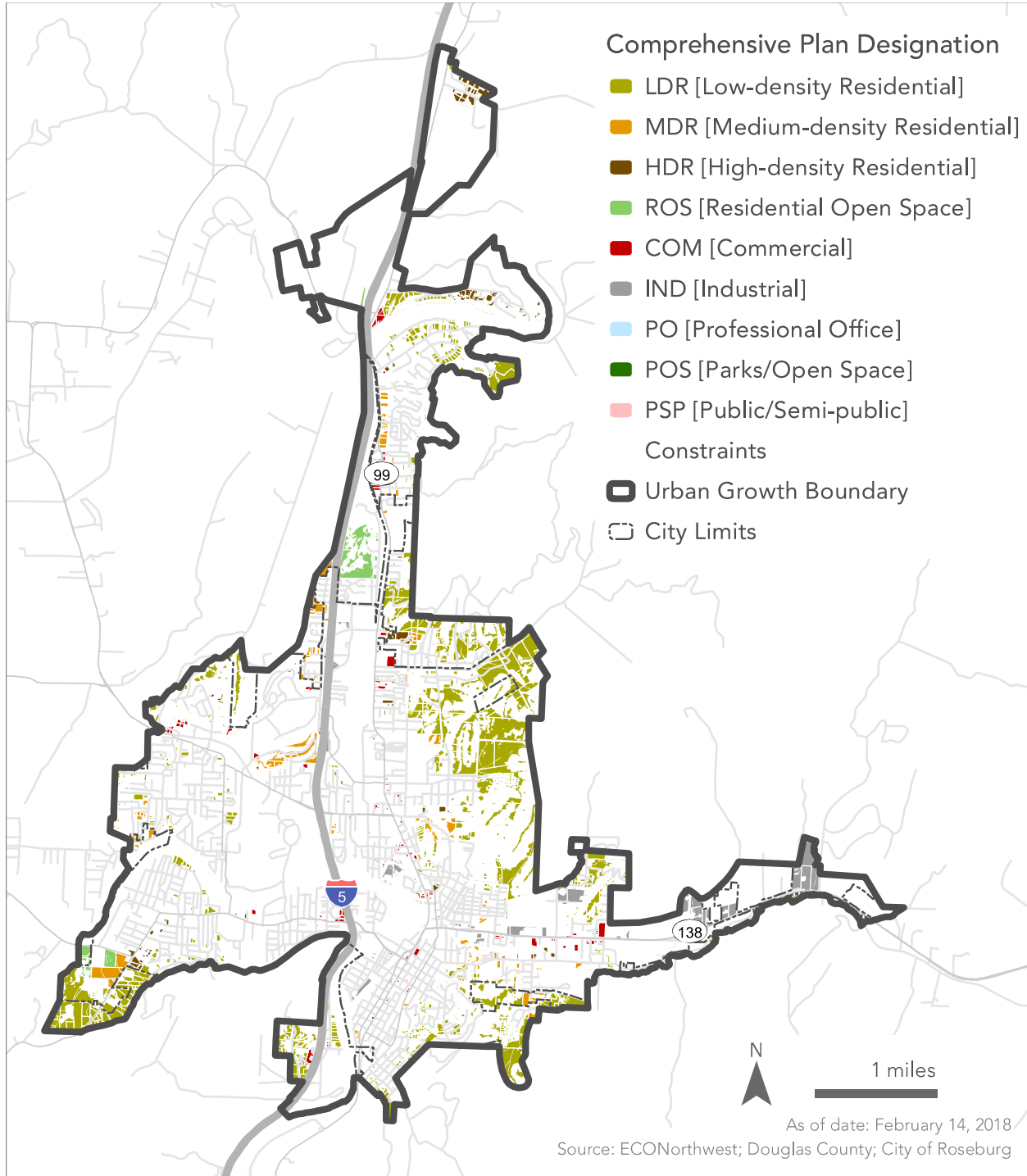
Exhibit 9. Vacant and partially vacant buildable acres on land with a slope of 12% to 24.9% by plan designation, Roseburg UGB, 2018

Plan Designation	Total Buildable acres	Buildable acres on vacant lots	Buildable acres on partially vacant lots
Low Density Residential	568	423	145
Medium Density Residential	57	43	14
High Density Residential	24	13	11
Total	649	479	170

Source: Douglas County, ECONorthwest analysis

Exhibit 10 shows Roseburg’s buildable vacant and partially vacant residential land.

tially Vacant with Constraints



Redevelopment Potential

Redevelopment potential deals primarily with developed land designated for two-family or multifamily residential use (High Density Residential and Medium Density Residential plan designations) that have single family residences (property class code 101 or 401) and where the ratio of improvement-to-land value is less than 1:1⁷. **Not all, or even a majority of parcels that meet these criteria for redevelopment potential will be assumed to redevelop during the planning period.**

To begin to estimate redevelopment potential, we plotted the distribution of improvement-to-land-value ratios for all residential parcels classified as developed.⁸ Exhibit 11 shows the distribution of improvement-to-land values for developed residential land in Roseburg in the High Density Residential and Medium Density Residential plan designations. It provides a summary of potentially redevelopable parcels by improvement-to-land value ratio in 2018. A ratio of less than 1:1 is a typical, but arbitrary, standard for estimating lands with redevelopment potential.

The results show that several residential parcels in the High Density Residential and Medium Density Residential designations have improvement-to-land value ratios of less than 1:1 – 734 parcels totaling 138 acres. Using improvement-to-land value ratios as an indicator of redevelopment potential suggests that some redevelopment potential exists in Roseburg at this time. At typical multifamily densities (11.1 dwelling units per net acre in High Density Residential and 8.9 in Medium Density Residential), the 138 acres have a capacity for about 1,294 new dwelling units.

Exhibit 11. Developed residential parcels by improvement/land value ratio, Roseburg UGB, 2018

Improvement to Land Value Ratio	High Density Residential	Medium Density Residential	Total
0-0.24	11	70	81
0.25-0.49	28	101	129
0.5-0.74	31	223	254
0.75-0.99	58	212	270
1+	172	929	1,101
Total	300	1,535	1,835

Source: Data from Douglas Co., Analysis by ECONorthwest.

⁷ In the context of a buildable lands inventory, we are only interested in redevelopment that increases the density or intensity of use. For example, a demolition of a dilapidated single-family home in an R-1 district for a new single-family residence creates a new housing unit but does not increase the number of residences on the site (or the density). Because we are only interested in development that increases residential density, the definition of potentially redevelopable land for this analysis includes only those developed parcels in designations that allow two-family or multiple family residential development (High Density Residential and Medium Density Residential).

⁸ Developed parcels include parcels that are fully developed, and the developed portion of partially developed parcels.

3. Historical and Recent Development Trends

Analysis of historical development trends in Roseburg provides insight into the functioning of the local housing market. The mix of housing types and densities, in particular, are key variables in forecasting the capacity of residential land to accommodate new housing and to forecast future land need. The specific steps are described in Task 2 of the *DLCD Planning for Residential Lands Workbook* as:

1. Determine the time period for which the data will be analyzed.
2. Identify types of housing to address (all needed housing types).
3. Evaluate permit/subdivision data to calculate the actual mix, average actual gross density, and average actual net density of all housing types.

This HNA examines changes in Roseburg’s housing market from January 2000 to 2017, plus building permit data for the 2007 to 2018 period. We selected this time period because it provides information about Roseburg’s housing market before and after the national housing market bubble’s growth, deflation, and the more recent increase in housing costs. Also, data about Roseburg’s housing market during this period is readily available from sources such as the Census and the City building permit database (which provides information for 2007 onwards).⁹

The HNA presents information about residential development by housing type. There are multiple ways that housing types can be grouped. For example, they can be grouped by:

1. Structure type (e.g., single-family detached, apartments, etc.).
2. Tenure (e.g., distinguishing unit type by owner or renter units).
3. Housing affordability (e.g., subsidized housing or units affordable at given income levels).
4. Some combination of these categories.

For the purposes of this study, we grouped housing types based on: (1) whether the structure is stand-alone or attached to another structure and (2) the number of dwelling units in each structure. The housing types used in this analysis are consistent with needed housing types as defined in ORS 197.303:¹⁰

⁹ ORS 197.296(5)(a) requires cities to determine housing capacity based on “...data relating to land within the urban growth boundary that has been collected since the last periodic review or five years, whichever is greater.” Given that Roseburg has not been in periodic review since 2009 and the best available data about building permits goes back to 2007, we used the 2007 to 2018 period for analysis of building permit data.

¹⁰ ORS 197.303 defines needed housing as “...all housing on land zoned for residential use or mixed residential and commercial use that is determined to meet the need shown for housing within an urban growth boundary at price ranges and rent levels that are affordable to households within the county with a variety of incomes.”

- **Single-family detached** includes single-family detached units, manufactured homes on lots and in mobile home parks, and accessory dwelling units.
- **Single-family attached** is all structures with a common wall where each dwelling unit occupies a separate lot, such as row houses or townhouses.
- **Multifamily** is all attached structures (e.g., duplexes, tri-plexes, quad-plexes, and structures with five or more units) other than single-family detached units, manufactured units, or single-family attached units.

In Roseburg, government assisted housing (ORS 197.303(b)) and housing for farmworkers (ORS 197.303(e)) can be any of the housing types listed above. Analysis within this report discusses housing affordability at a variety of incomes, as required in ORS 197.303.

Data Used in this Analysis

Throughout this analysis (including the subsequent Chapter 4), we used data from multiple sources, choosing data from well-recognized and reliable data sources. One of the key sources for housing and household data is the U.S. Census. This report primarily uses data from two Census sources:

- The **Decennial Census**, which is completed every ten years and is a survey of all households in the U.S. The Decennial Census is considered the best available data for information such as demographics (e.g., number of people, age distribution, or ethnic or racial composition), household characteristics (e.g., household size and composition), and housing occupancy characteristics. As of 2010, the Decennial Census does not collect more detailed household information, such as income, housing costs, housing characteristics, and other important household information. Decennial Census data is available for 2000 and 2010.
- The **American Community Survey (ACS)**, which is completed every year and is a *sample* of households in the U.S. From 2012 to 2016 and 2013 to 2017, the ACS sampled an average of 3.5 million households per year, or about 2.6% and 2.9% of the households in the nation. The ACS collects detailed information about households, including demographics (e.g., number of people, age distribution, ethnic or racial composition, country of origin, language spoken at home, and educational attainment), household characteristics (e.g., household size and composition), housing characteristics (e.g., type of housing unit, year unit built, or number of bedrooms), housing costs (e.g., rent, mortgage, utility, and insurance), housing value, income, and other characteristics.
- **Roseburg Building Permit database**, which includes information on permits issued at the City of Roseburg from 2007 to 2018.
- **Douglas County Assessor and Zillow**, which provides real estate and sales data. We use this source to collect housing sale price.

- **Housing Authority of Douglas County**, which provides rent data through a 2018 rent survey.

This report uses data from the 2012-2016 and 2013-2017 ACS for Roseburg. Where information is available and relevant, we report information from the 2000 and 2010 Decennial Census. Among other data points, this report includes population, income, and housing price data from the Oregon Office of Economic Analysis, the Oregon Bureau of Labor and Industries, the United States Department of Housing and Urban Development, Zillow, and the Housing Authority of Douglas County. It also uses the Oregon Department of Housing and Community Services affordable housing inventory and Oregon’s Manufactured Dwelling Park inventory.

The foundation of the housing needs analysis is the population forecast for Roseburg from the Oregon Population Forecast Program. The forecast is prepared by the Portland State University Population Research Center.

It is worth commenting on the methods used for the American Community Survey.¹¹ The American Community Survey (ACS) is a national survey that uses continuous measurement methods. It uses a sample of about 3.54 million households to produce annually updated estimates for the same small areas (census tracts and block groups) formerly surveyed via the decennial census long-form sample. It is also important to keep in mind that all ACS data are estimates that are subject to sample variability. This variability is referred to as “sampling error” and is expressed as a band or “margin of error” (MOE) around the estimate.

This report uses Census and ACS data because, despite the inherent methodological limits, they represent the most thorough and accurate data available to assess housing needs. We consider these limitations in making interpretations of the data and have strived not to draw conclusions beyond the quality of the data.

¹¹ A thorough description of the ACS can be found in the Census Bureau’s publication “What Local Governments Need to Know.” <https://www.census.gov/library/publications/2009/acs/state-and-local.html>

Trends in Housing Mix

This section provides an overview of changes in the mix of housing types in Roseburg and compares Roseburg to Douglas County and to Oregon. These trends demonstrate the types of housing developed in Roseburg historically. Unless otherwise noted, this chapter uses data from the 2000 and 2010 Decennial Census and the 2012-2016 or 2013-2017 American Community Survey 5-Year Estimates.

This section shows the following trends in housing mix in Roseburg:

- **Roseburg’s housing stock is predominantly single-family detached housing units.** Seventy percent of Roseburg’s housing stock is single-family detached, 26% is multifamily, and 4% is single-family attached (e.g., townhouses).
- **Since 2000, Roseburg’s housing mix has stayed relatively consistent.** Roseburg’s housing stock grew by about 21% (about 1,858 new units) between 2000 and the 2013-2017 period.
- **Single-family housing accounted for the majority of new housing growth in Roseburg between 2007 and 2018.** Ninety-four percent of new housing permitted between 2007 and 2018 was single-family housing.

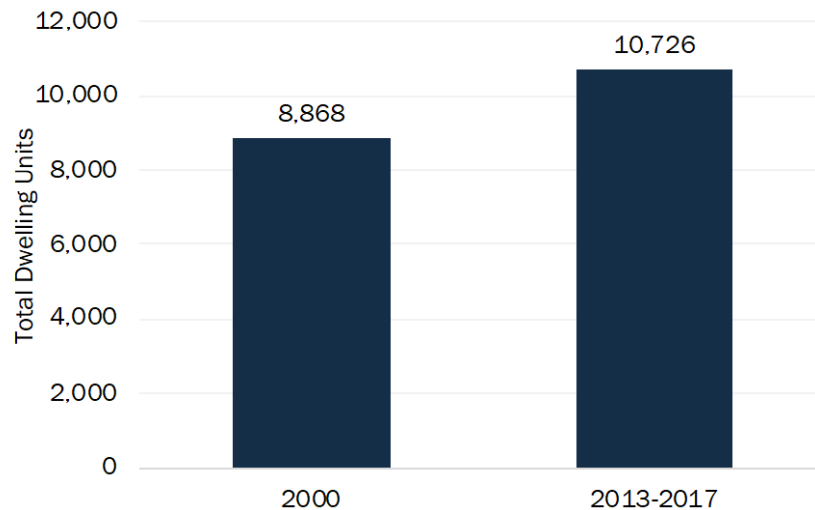
Housing Mix

The total number of dwelling units in Roseburg increased by 21% from 2000 to 2013-2017.

Roseburg added 1,858 units over 2000 to 2013-2017.

Exhibit 12. Total Dwelling Units, Roseburg City Limits, 2000 and 2013-2017

Source: U.S. Census Bureau, 2000 Decennial Census, SF3 Table H030, and ACS 2013-2017 5-year estimates, Table B25024.

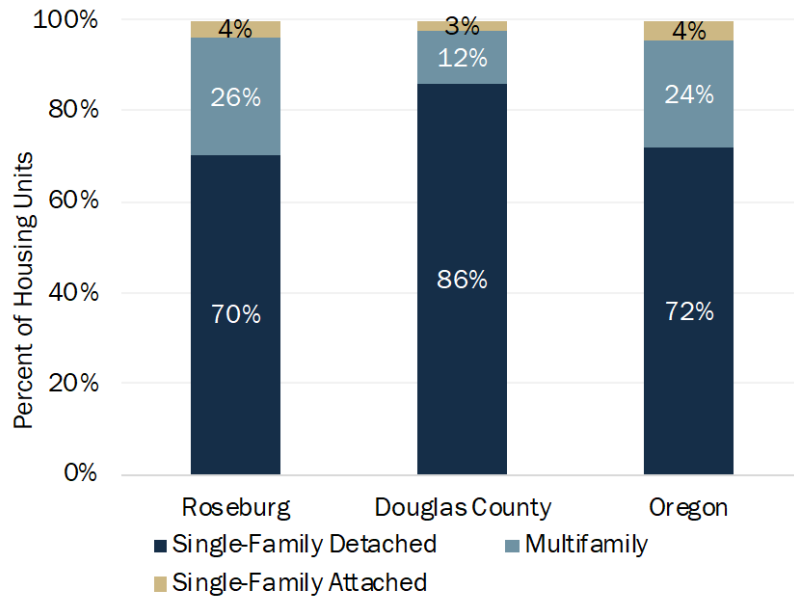


About 70% of Roseburg’s housing stock is single-family detached.

Roseburg has a larger share of multifamily housing units than Douglas County and an approximately equal share of multifamily units relative to Oregon.

Exhibit 13. Housing Mix, Roseburg City Limits, Douglas County, and Oregon, 2013-2017

Source: U.S. Census Bureau, ACS 2013-2017 5-year estimates, Table B25024.

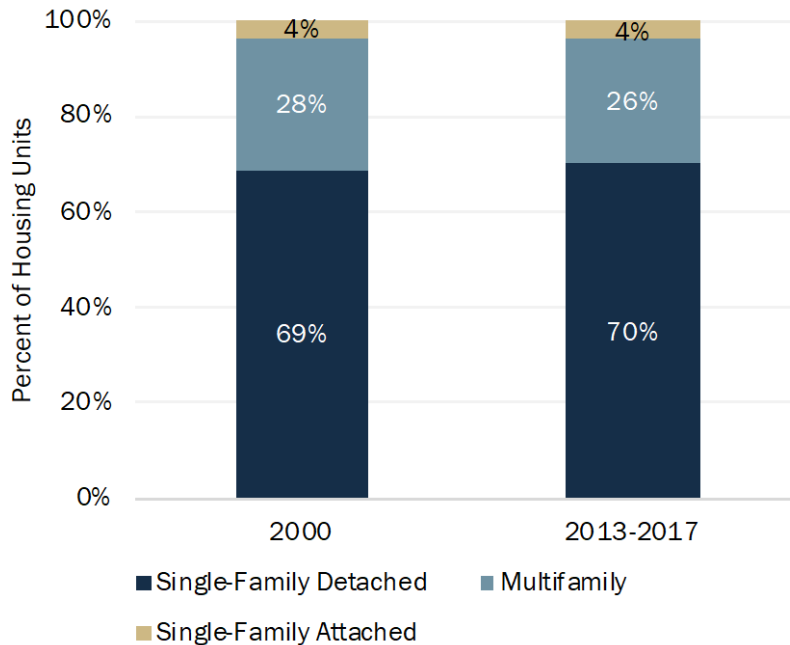


From 2000 to 2013-2017, the share of multifamily housing in Roseburg decreased slightly.

A majority of new units (1,464 or 79%) were single-family detached.

Exhibit 14. Change in Housing Mix, Roseburg City Limits, 2000 and 2013-2017

Source: U.S. Census Bureau, 2000 Decennial Census, SF3 Table H030, and ACS 2013-2017 5-year estimates, Table B25024.



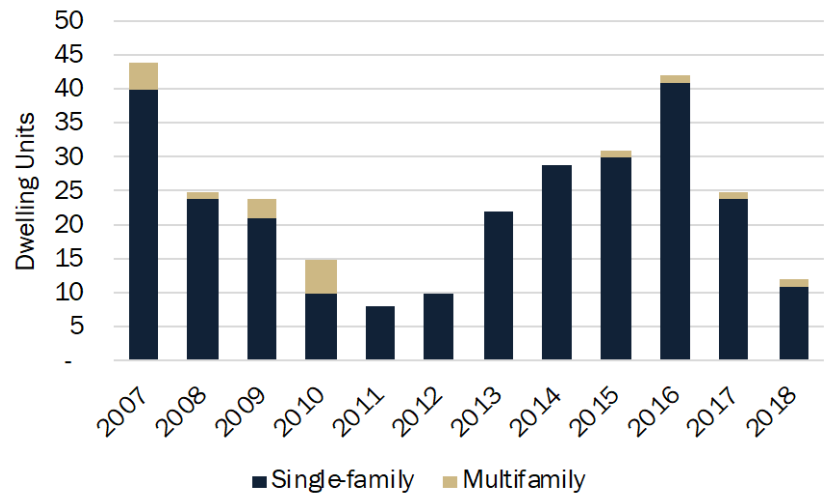
Building Permits

Over the 2007 to 2018 analysis period, Roseburg issued permits for 287, dwelling units, with an annual average of 26 permits issued.

Of these 287 permits, about 94% were for single-family dwelling units.

Exhibit 15. Building Permits Issued for New Residential Construction by Type of Unit, Roseburg, 2007 through 2018

Source: City of Roseburg. Note: In regard to 2018 permits in particular, the records at the building department can sometimes be inconsistent. In some circumstances, the number of permits is based on the date finalized and other times is based on the date issued.



Trends in Housing Density

Housing density is the density of residential structures by structure type, expressed in dwelling units per net or gross acre.¹² The U.S. Census does not track residential development density. Thus, this study analyzes housing density based on Roseburg’s permit database for development between 2007 and 2018.

Between 2007 and 2018, Roseburg permitted 326 new dwelling units. Of the 326 new units, 270 units were single-family (94%) and 17 units were multifamily (6%). During this time, housing in Roseburg developed at an average net density of 4.1 dwelling units per net acre. Exhibit 16 shows average net residential density by structure type for the historical analysis period. Single-family housing developed at 3.7 dwelling units per net acre and multifamily housing developed at 9.3 dwelling units per net acre.

¹² OAR 660-024-0010(6) uses the following definition of net buildable acre. “Net Buildable Acre” consists of 43,560 square feet of residentially designated buildable land after excluding future rights-of-way for streets and roads. While the administrative rule does not include a definition of a gross buildable acre, using the definition above, a gross buildable acre will include areas used for rights-of-way for streets and roads. Areas used for rights-of-way are considered unbuildable.

Exhibit 16. Net Density by Structure Type and Plan Designation, Roseburg, 2007 through 2018

Source: City of Roseburg Permit Database.

	Single-Family Detached			Multifamily			Total, Combined		
	Units	Acres	Net Density	Units	Acres	Net Density	Units	Acres	Net Density
Low Density Residential	211	59	3.6	10	1	7.7	221	61	3.7
Medium Density Residential	61	14	4.3	24	3	8.9	85	17	5.1
High Density Residential				20	2	11.1	20	2	11.1
Total	272	73	3.7	54	6	9.3	326	79	4.1

Trends in Tenure

Housing tenure describes whether a dwelling is owner- or renter-occupied. This section shows:

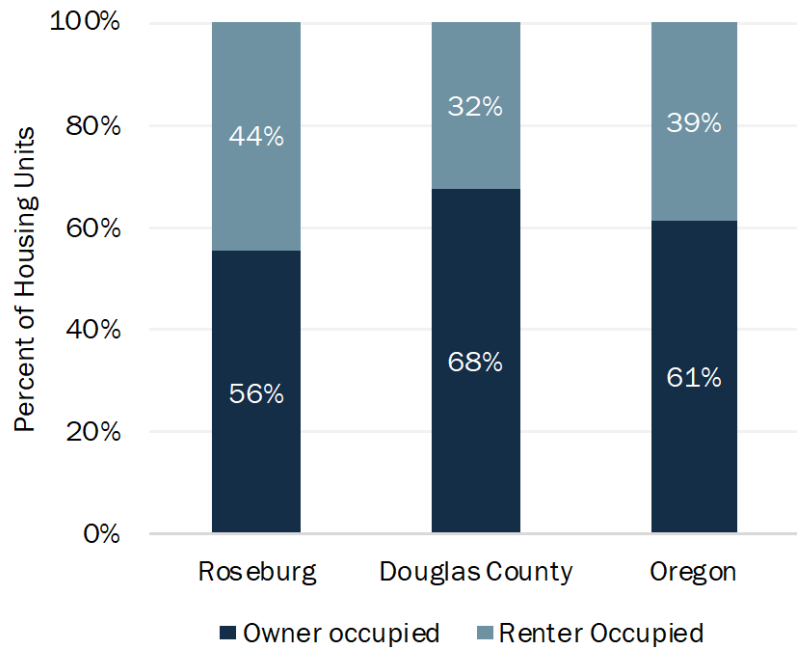
- **Homeownership rates in Roseburg are lower than averages for both Douglas County and Oregon.** About 56% of Roseburg’s households own their home. In comparison, 68% of Douglas County households and 61% of Oregon households are homeowners.
- **Homeownership rates in Roseburg stayed relatively stable between 2000 and 2012-2016.** In 2000, 57% of Roseburg households were homeowners. This dropped down to 51% in 2010, though increased to 56% in 2012-2016.
- **Nearly all Roseburg homeowners (98%) live in single-family detached housing, while half of renters (50%) live in multifamily housing.**

The implications for the forecast of new housing are: (1) opportunities for rental housing in Roseburg are limited, given that half of renters live in multifamily housing and limited multifamily housing has been built in Roseburg since 2007 (6% of new dwelling units between 2007 and 2018 were in multifamily dwellings), and (2) there may be opportunities to encourage development of a wider variety of affordable attached housing types for homeownership, such as townhomes.

Relative to both Douglas County and Oregon, Roseburg has a lower homeownership rate than each. Over the 2012-2016 period, 56% of Roseburg's occupied housing units were owner-occupied. In Douglas County, the homeownership rate was 68%, and in Oregon, the rate was 61%.

Exhibit 17. Tenure, Occupied Units, Roseburg City Limits, Douglas County, and Oregon, 2012-2016

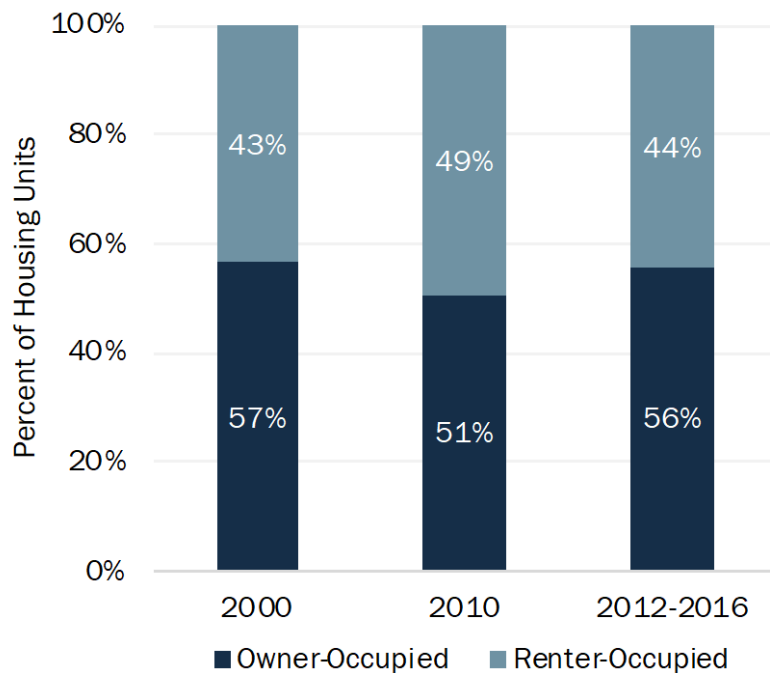
Source: U.S. Census Bureau, ACS 2012-2016 5-year estimates, Table B25003.



The homeownership rate in Roseburg over 2000 to 2012-2016 has remained stable at roughly 56% to 57%. In 2010, the rate dropped to 51%, but in subsequent years it increased to 56% during 2012-2016.

Exhibit 18. Tenure, Occupied Units, Roseburg City Limits, 2000, 2010, and 2012-2016

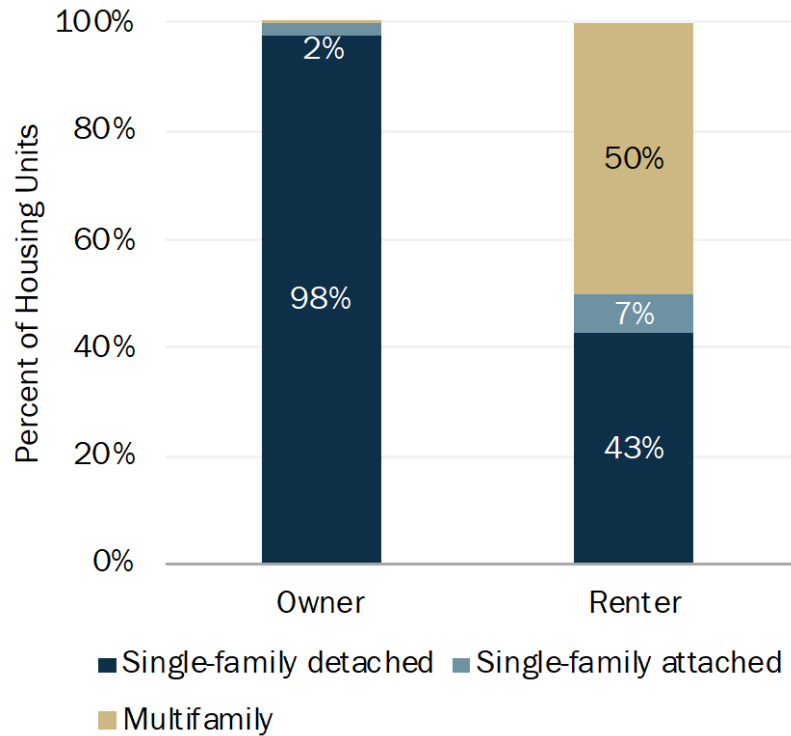
Source: U.S. Census Bureau, 2000 Decennial Census SF1 Table H004, 2010 Decennial Census SF1, Table H4, and ACS 2012-2016 5-year estimates, Table B24003.



Nearly all Roseburg homeowners (98%) live in single-family detached housing. Half of Roseburg renters live in multifamily housing and 43% of renters live in single-family detached housing.

Exhibit 19. Housing Units by Type and Tenure, Roseburg City Limits, 2012-2016

Source: U.S. Census Bureau, ACS 2012-2016 5-year estimates, Table B25032.



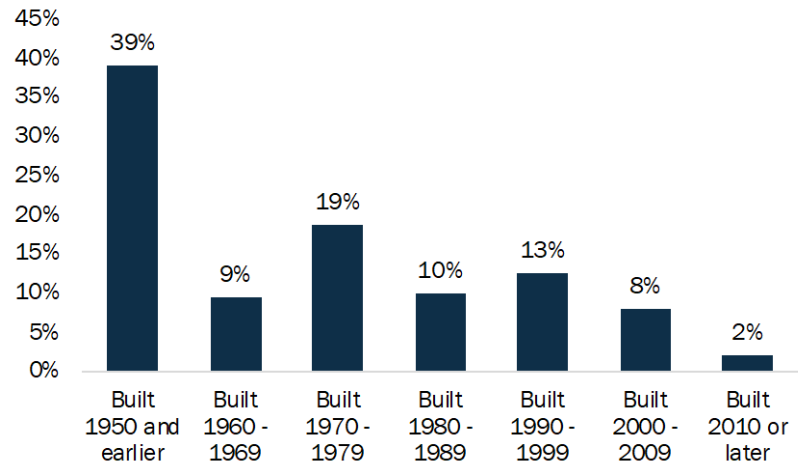
Housing Conditions

Roseburg stakeholders provided feedback that housing conditions in Roseburg are substandard. Findings from stakeholder interviews suggested that primary reasons for substandard housing conditions are that housing stock is old and little development has occurred in recent years. Stakeholders indicate that housing rehabilitation projects do not produce feasible returns on investment. ADA requirements and other building code standards makes projects difficult to make financially feasible.

Almost 40% of Roseburg's housing stock was built in 1950 or earlier.

Exhibit 20. Structure by Year Built, Roseburg City Limits, 2013-2017

Source: U.S. Census Bureau, ACS 2013-2017 5-year estimates, Table B25034.



Vacancy Rates

Housing vacancy is a measure of housing that is available to prospective renters and buyers. It is also a measure of unutilized housing stock. The Census defines vacancy as: "Unoccupied housing units... determined by the terms under which the unit may be occupied, e.g., for rent, for sale, or for seasonal use only." The 2010 Census identified vacancy through an enumeration, separate from (but related to) the survey of households. Enumerators are obtained using information from property owners and managers, neighbors, rental agents, and others.

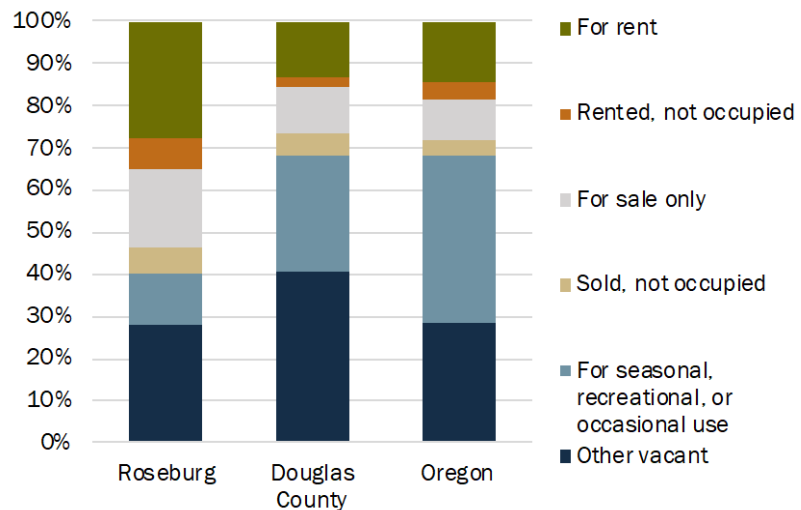
According to the 2013-2017 Census, the vacancy rate in Roseburg was 7.6%, compared to 10.1% for Douglas County and 9.3% for Oregon. One of the factors contributing to Roseburg's vacancy rate is the poor condition of some housing in Roseburg. The percentage of vacant housing for rent in Roseburg may be higher than for the state or county because of poor housing conditions in Roseburg.

About 27% of Roseburg's vacant housing stock are rentals ("for rent"), compared to 13% of Douglas County's and 14% of Oregon's housing stock.

Roseburg also has a slightly larger share of vacant housing for sale (19%), compared to Douglas County (11%) and Oregon (9%).

Exhibit 21. Vacancy Status, Roseburg City Limits, Douglas County, and Oregon, 2013-2017

Source: U.S. Census Bureau, ACS 2013-2017 5-year estimates, Table B25004.



Government-Assisted Housing

Governmental agencies and nonprofit organizations offer a range of housing assistance to low- and moderate-income households in renting or purchasing a home. There are 28 government-assisted housing developments in Roseburg:¹³

- Brookside Court Apartments has 50 total units and 49 units are affordable housing for seniors.
- Camas Ridge Apartments has 10 total units and 6 units are affordable housing for families.
- Cecil House has 1 total unit and that single unit is affordable housing for families.
- Crest View South has 4 units of affordable housing for families and persons previously incarcerated.
- Crestview Terrace has 11 total units and 8 units are affordable housing for persons previously incarcerated.
- David's House has 7 total units and all 7 units are affordable housing for persons with physical disabilities.
- Diamond Court has 8 total units and all 8 units are affordable housing. Four units are allocated for families and the other four are allocated to persons with disabilities.
- Eagle Landing has 55 total units and 54 units are affordable housing for homeless persons.
- Esperanza Circle has 6 total units and 5 units are affordable housing for families.
- The Grand Apartments has 37 total units and 33 units are affordable housing. Nineteen units are allocated for families and the other nineteen are allocated to homeless persons.
- Grandview Homes has 10 total units and all 10 units are affordable housing. No data are provided on the persons currently residing there.
- Meadow Creek Retirement Community has 50 total units and 49 units are affordable housing for seniors.
- Neu Place has 12 total units and all 12 units are affordable housing. Eleven units are allocated to persons with developmental disabilities and one unit is allocated for families.
- Oak Grove Retirement Center has 30 total units and all 30 units are affordable housing for seniors.
- Orchard Knoll has 65 total units and all 65 units are affordable housing for homeless persons.

¹³ Oregon Housing and Community Services. (Jan. 2018). Affordable Housing Inventory in Oregon. Retrieved from: <https://www.oregon.gov/ohcs/ISD/RA/housing-profiles/affordable-housing-oregon-inventory.xls>.

- Parkside Village has 36 total units and all 36 units are affordable housing for families.
- Princeton Court Apartments has 26 total units and all 26 units are affordable housing. Thirteen units are allocated to families and the other thirteen are allocated to a group undisclosed in OHCS's inventory.
- Rice House has 1 total unit and that single unit is allocated to families.
- Rose Apartments has 40 total units and all 40 units are affordable housing for seniors.
- Rose Villa has 91 total units and all 91 units are affordable housing for families.
- Roseburg Project has 10 total units and all 10 units are affordable housing for persons with developmental disabilities.
- Rosewood Park Homes has 60 total units and all 60 units are affordable housing for families.
- The Schaeffer House has 2 total units and both units are affordable housing for families.
- Sunset Apartments has 31 total units and all 31 units are affordable housing. Twenty-six units are allocated to families and the remaining five units are allocated to a group undisclosed in OHCS's inventory.
- Trillium Terrace has 8 total units and 6 units are affordable housing for families.
- Vine Street Court I has 70 total units and all 70 units are affordable housing for families.
- Vine Street Court II has 16 total units and all 16 units are affordable housing for families.
- Westview Commons has 18 total units and all 18 units are affordable housing to a group undisclosed in OHCS's inventory.

Manufactured Homes

Manufactured homes provide a source of affordable housing in Roseburg. They provide a form of homeownership that can be made available to low- and moderate-income households. Cities are required to plan for manufactured homes—both on lots and in parks (ORS 197.475-492).

Generally, manufactured homes in parks are owned by the occupants who pay rent for the space. Monthly housing costs are typically lower for a homeowner in a manufactured home park for several reasons, including the fact that property taxes levied on the value of the land are paid by the property owner, rather than the manufactured home owner. The value of the manufactured home generally does not appreciate in the way a conventional home would, however. Manufactured homeowners in parks are also subject to the mercy of the property owner in terms of rent rates and increases. It is generally not within the means of a manufactured homeowner to relocate to another manufactured home to escape rent increases. Homeowners living in a park is desirable to some because it can provide a more secure community with on-site managers and amenities, such as laundry and recreation facilities.

According to Census data, Roseburg had 547 mobile homes in 2000, and 824 mobile homes during the 2013-2017 period, an increase of 277 units. Eighty-nine percent of the mobile homes in Roseburg were owner-occupied in the 2012-2016 period.

OAR 197.480(4) requires cities to inventory the mobile home or manufactured dwelling parks sited in areas planned and zoned or generally used for commercial, industrial, or high-density residential development. Exhibit 22 presents the inventory of mobile and manufactured home parks within Roseburg as of October 2018.

Roseburg has 13 manufactured home parks within its UGB. Within these parks, there are a total of 1,044 spaces, 81 of which were vacant as of October 2018.

Exhibit 22. Inventory of Mobile/Manufactured Home Parks, Roseburg UGB, October 2018

Source: Oregon Manufactured Dwelling Park Directory.

Name	Location	Type	Total Spaces	Vacant Spaces	Comprehensive Plan Designation
Alameda Avenue Trailer Park	581 NE Alameda Ave.	Family	58	0	Medium Density Residential
Brookside Mobile Manor	2540 NE Kerr St.	Family	8	0	Medium Density Residential
Gilley Mobile Home Park	2010 NE Stephens St.	Family	41	7	Commercial
Mt. Nebo Mobile Home Park	2071 NE Stephens St.	Family	121	21	Medium Density Residential
Neptune Mobile Park	133 Neptune Lane	55+	12	2	Low Density Residential
Northpark Mobile Village	2571 NE Stephens St.	55+	108	5	Medium Density Residential
Parkrose Mobile Village	2721 NE Stephens St.	Family	28	2	High Density Residential
Pinewood Mobile Home Park	5000 NE Stephens St.	Family	30	6	Medium Density Residential
River View Estates	101 W River Ridge	55+	60	1	Medium Density Residential
Saddle Butte	222 Saddle Butte Ln	Family	297	21	Medium Density Residential
Shadow Ranch	99 Shadow Ranch Lane	55+	183	9	Industrial
Vintage Village	102 O'Neal Ln	Family	19	7	Commercial
Woodland Hills	4533 NE Stephens St	55+	79	0	Medium Density Residential
Total			1,044	81	

4. Demographic and Other Factors Affecting Residential Development in Roseburg

Demographic trends are important for a thorough understanding of the dynamics of the Roseburg housing market. Roseburg exists in a regional economy; trends in the region impact the local housing market. This chapter documents demographic, socioeconomic, and other trends relevant to Roseburg at the national, state, and regional levels.

Demographic trends provide a context for growth in a region; factors such as age, income, migration, and other trends show how communities have grown and how they will shape future growth. To provide context, we compare Roseburg to Douglas County and Oregon. We also compare Roseburg to nearby cities (Myrtle Creek, Sutherlin, Winston) where appropriate. Characteristics such as age and ethnicity are indicators of how the population has grown in the past and provide insight into factors that may affect future growth.

A recommended approach to conducting a housing needs analysis is described in *Planning for Residential Growth: A Workbook for Oregon's Urban Areas*, the Department of Land Conservation and Development's guidebook on local housing needs studies. As described in the workbook, the specific steps in the housing needs analysis are:

1. Project the number of new housing units needed in the next 20 years.
2. Identify relevant national, state, and local demographic and economic trends and factors that may affect the 20-year projection of structure type mix.
3. Describe the demographic characteristics of the population and, if possible, the housing trends that relate to demand for different types of housing.
4. Determine the types of housing that are likely to be affordable to the projected households based on household income.
5. Determine the needed housing mix and density ranges for each plan designation and the average needed net density for all structure types.
6. Estimate the number of additional needed units by structure type.

This chapter presents data to address steps 2, 3, and 4 in this list. Chapter 5 presents data to address steps 1, 5, and 6 in this list.

Demographic and Socioeconomic Factors Affecting Housing Choice¹⁴

Analysts typically describe housing demand as the *preferences* for different types of housing (e.g., single-family detached or apartment), and *the ability to pay* for that housing (the ability to exercise those preferences in a housing market by purchasing or renting housing; in other words, income or wealth).

Many demographic and socioeconomic variables affect housing choice. However, the literature about housing markets finds that age of the householder, size of the household, and income are most strongly correlated with housing choice.

- **Age of householder** is the age of the person identified (in the Census) as the head of household. Households make different housing choices at different stages of life. This chapter discusses generational trends, such as housing preferences of Baby Boomers, people born from about 1946 to 1964, and Millennials, people born from about 1980 to 2000.
- **Size of household** is the number of people living in the household. Younger and older people are more likely to live in single-person households. People in their middle years are more likely to live in multiple person households (often with children).
- **Income** is the household income. Income is probably the most important determinant of housing choice. Income is strongly related to the type of housing a household chooses (e.g., single-family detached, duplex, or a building with more than five units) and to household tenure (e.g., rent or own).

This chapter focuses on these factors, presenting data that suggests how changes to these factors may affect housing need in Roseburg over the next 20 years.

¹⁴ The research in this chapter is based on numerous articles and sources of information about housing, including:

D. Myers and S. Ryu, *Aging Baby Boomers and the Generational Housing Bubble*, Journal of the American Planning Association, Winter 2008.

Davis, Hibbits, & Midghal Research, "Metro Residential Preference Survey," May 2014.

L. Lachman and D. Brett, *Generation Y: America's New Housing Wave*, Urban Land Institute, 2010.

George Galster. People Versus Place, People and Place, or More? New Directions for Housing Policy, Housing Policy Debate, 2017.

Herbert, Christopher and Hrabchak Molinsky. "Meeting the Housing Needs of an Aging Population," 2015.

J. McIlwain, *Housing in America: The New Decade*, Urban Land Institute, 2010.

Schuetz, Jenny. Who is the new face of American homeownership? Brookings, 2017.

The American Planning Association, "Investing in Place; Two generations' view on the future of communities," 2014.

Transportation for America, "Access to Public Transportation a Top Criterion for Millennials When Deciding Where to Live, New Survey Shows," 2014.

National Trends¹⁵

This brief summary on national housing trends builds on previous work by ECONorthwest, the Urban Land Institute (ULI) reports, and conclusions from *The State of the Nation's Housing, 2018* report from the Joint Center for Housing Studies of Harvard University. The Harvard report summarizes the national housing outlook as follows:

“By many metrics, the housing market is on sound footing. With the economy near full employment, household incomes are increasing and boosting housing demand. On the supply side, a decade of historically low single-family construction has left room for expansion of this important sector of the economy. Although multifamily construction appears to be slowing, vacancy rates are still low enough to support additional rentals. In fact, to the extent that growth in supply outpaces demand, a slowdown in rent growth should help to ease affordability concerns.”

However, challenges to a strong domestic housing market remain. High mortgage rates make housing unaffordable for many Americans, especially younger Americans. In addition to rising housing costs, wages have also failed to keep pace, worsening affordability pressures. Single-family and multifamily housing supplies remain tight, which compound affordability issues. *The State of the Nation's Housing* report emphasizes the importance of government assistance and intervention to keep housing affordable moving forward. Several challenges and trends shaping the housing market are summarized below:

- **Moderate new construction and tight housing supply, particularly for affordable housing.** New construction experienced its eighth year of gains in 2017 with 1.2 million units added to the national stock. Estimates for multifamily starts range between 350,000 to 400,000 (2017). The supply of for sale homes listed in 2017 averaged 3.9 months; this is below what is considered balanced (six months) and lower cost homes are considered especially scarce. The State of the Nation's Housing report cites lack of skilled labor, higher building costs, scarce developable land, and the cost of local zoning and regulation as impediments to new construction.
- **Demand shift from renting to owning.** After years of decline, the national homeownership rate increased from a 50-year low of 62.9% in 2016 (Q2) to 63.7% in 2017 (Q2). Trends suggest homeownership among householders aged 65 and older have remained strong and homeownership rates among young adults have begun stabilizing after years of decline.
- **Housing affordability.** In 2016, almost one-third of American households spent more than 30% of their income on housing. This figure is down from the prior year, bolstered by a considerable drop in the owner share of cost-burdened households. Low-income households face an especially dire hurdle to afford housing. With such

¹⁵ These trends are based on information from: (1) The Joint Center for Housing Studies of Harvard University's publication "The State of the Nation's Housing 2018," (2) Urban Land Institute, "2018 Emerging Trends in Real Estate," and (3) the U.S. Census.

a large share of households exceeding the traditional standards for affordability, policymakers are focusing efforts on the severely cost burdened. Among those earning less than \$15,000, more than 70% of households paid more than half of their income on housing.

- **Long-term growth and housing demand.** The Joint Center for Housing Studies forecasts that nationally, demand for new homes could total as many as 12 million units between 2017 and 2027. Much of the demand will come from Baby Boomers, Millennials,¹⁶ and immigrants. The Urban Land Institute cites the trouble of overbuilding in the luxury sector while demand is in mid-priced single-family houses affordable to a larger buyer pool.
- **Growth in rehabilitation market.**¹⁷ Aging housing stock and poor housing conditions are growing concerns for jurisdictions across the United States. With almost 80% of the nation's housing stock at least 20 years old (40% at least 50 years old), Americans are spending in excess of \$400 billion per year on residential renovations and repairs. As housing rehabilitation becomes the go-to solution to address housing conditions, the home remodeling market has grown more than 50% since the recession ended—generating 2.2% of national economic activity (in 2017).

Despite trends suggesting growth in the rehabilitation market, rising construction costs and complex regulatory requirements pose barriers to rehabilitation. Lower-income households or households on fixed-incomes may defer maintenance for years due to limited financial means, escalating rehabilitation costs. At a certain point, the cost of improvements may outweigh the value of the structure, which may necessitate new responses such as demolition or redevelopment.

- **Changes in housing preference.** Housing preference will be affected by changes in demographics; most notably, the aging of the Baby Boomers, housing demand from Millennials, and growth of immigrants.
 - *Baby Boomers.* The housing market will be affected by continued aging of the Baby Boomers, the oldest of whom were in their seventies in 2018 and the youngest of whom were in their fifties in 2018. Baby Boomers' housing choices will affect housing preference and homeownership. Addressing housing needs for those moving through their 60s, 70s, and 80s (and beyond) will require a range of housing opportunities. For example, “the 82-to-86-year-old cohort dominates the assisted living and more intensive care sector” while new or near-retirees may prefer aging in place or active, age-targeted communities.¹⁸

¹⁶ According to the Pew Research Center, Millennials were born between the years of 1981 to 1996 (inclusive). Read more about generations and their definitions here: <http://www.pewresearch.org/fact-tank/2018/03/01/defining-generations-where-millennials-end-and-post-millennials-begin/>. Note: To generalize, and because there is no official definition of millennial, we define this cohort as individuals born between 1980 and 2000.

¹⁷ These findings are copied from: Joint Center for Housing Studies. (2019). Improving America's Housing, Harvard University. https://www.jchs.harvard.edu/sites/default/files/Harvard_JCHS_Improving_Americas_Housing_2019.pdf

¹⁸ Urban Land Institute (2018). Emerging Trends in Real Estate, United States and Canada.

Characteristics like immigration and ethnicity play a role too as “older Asians and Hispanics are more likely than whites or blacks to live in multigenerational households.”¹⁹ Senior households earning different incomes may make distinctive housing choices. For instance, low income seniors may not have the financial resources to live out their years in a nursing home and may instead choose to downsize to smaller, more affordable units. Seniors living in close proximity to relatives may also choose to live in multigenerational households.

Research shows that “older people in western countries prefer to live in their own familiar environment as long as possible,” but aging in place does not only mean growing old in their own homes.²⁰ A broader definition exists which explains that aging in place also means “remaining in the current community and living in the residence of one’s choice.”²¹ Therefore, some Boomers are likely to stay in their home as long as they are able, and some will prefer to move into other housing products, such as multifamily housing or age-restricted housing developments, before they move into to a dependent living facility or into a familial home. Moreover, “the aging of the U.S. population, [including] the continued growth in the percentage of single-person households, and the demand for a wider range of housing choices in communities across the country is fueling interest in new forms of residential development, including tiny homes.”²²

- *Millennials.* Over the last several decades, young adults increasingly lived in multi-generational housing – and increasingly more so than older demographics.²³ Despite this trend, as Millennials age over the next 20 years, they will be forming households and families. In 2018, the oldest Millennials were in their late-30s and the youngest were in their late-teens. By 2040, Millennials will be between 40 and 60 years old.

At the beginning of the 2007-2009 recession Millennials only started forming their own households. Today, Millennials are driving much of the growth in new households, albeit at slower rates than previous generations. From 2012 to 2017, millennials formed an average of 2.1 million net new households each year. Twenty-six percent of Millennials aged 25 to 34 lived with their parents (or other relatives) in 2017.

Millennials’ average wealth may remain far below Boomers and Gen Xers and student loan debt will continue to hinder consumer behavior and affect

¹⁹ Herbert, Christopher and Hrabchak Molinsky (2015). Meeting the Housing Needs of an Aging Population. https://shelterforce.org/2015/05/30/meeting_the_housing_needs_of_an_aging_population/

²⁰ Vanleerberghe, Patricia, et al. (2017). The quality of life of older people aging in place: a literature review.

²¹ Ibid.

²² American Planning Association. Making Space for Tiny Houses, Quick Notes.

²³ According to the Pew Research Center, in 1980, just 11% of adults aged 25 to 34 lived in a multi-generational family household and by 2008, 20% did (82% change). Comparatively, 17% of adults aged 65 and older lived in a multi-generational family household and by 2008, 20% did (18% change).

retirement savings. As of 2015, Millennials comprised 28% of active home buyers, while Gen Xers comprised 32% and Boomers 31%.²⁴ That said, “over the next 15 years, nearly \$24 trillion will be transferred in bequests,” presenting new opportunities for Millennials (as well as Gen Xers).

- *Immigrants.* Research on foreign-born populations find that immigrants, more than native-born populations, prefer to live in multi-generational housing. Still, immigration and increased homeownership among minorities could also play a key role in accelerating household growth over the next 10 years. Current Population Survey estimates indicate that the number of foreign-born households rose by nearly 400,000 annually between 2001 and 2007, and they accounted for nearly 30% of overall household growth. Beginning in 2008, the influx of immigrants was stanchied by the effects of the Great Recession. After a period of declines, however, the foreign born are again contributing to household growth. The Census Bureau’s estimates of net immigration in 2017–2018 indicate that 1.2 million immigrants moved to the U.S. from abroad, down from 1.3 million immigrants in 2016-2017 but higher than the average annual pace of 850,000 during the period of 2009–2011. However, if recent Federal policies about immigration are successful, growth in undocumented and documented immigration could slow and cause a drag on household growth in the coming years.
- *Diversity.* The growing diversity of American households will have a large impact on the domestic housing markets. Over the coming decade, minorities will make up a larger share of young households and constitute an important source of demand for both rental housing and small homes. The growing gap in homeownership rates between whites and blacks, as well as the larger share of minority households that are cost burdened warrants consideration. Since 1994, the difference in homeownership rates between whites and blacks rose by 1.9 percentage points to 29.2% in 2017. Alternatively, the gap between white and Latinx homeownership rates, and white and Asian homeownership rates, both decreased during this period but remained sizable at 26.1 and 16.5 percentage points, respectively. Although homeownership rates are increasing for some minorities, large shares of minority households are more likely to live in high-cost metro areas. This, combined with lower incomes than white households, leads to higher rates of cost burden for minorities—47% for blacks, 44% for Latinx, 37% for Asians/others, and 28% for whites in 2015.
- **Changes in housing characteristics.** The U.S. Census Bureau’s Characteristics of New Housing Report (2017) presents data that show trends in the characteristics of new

²⁴ Srinivas, Val and Goradia, Urval (2015). The future of wealth in the United States, Deloitte Insights. <https://www2.deloitte.com/insights/us/en/industry/investment-management/us-generational-wealth-trends.html>

housing for the nation, state, and local areas. Several long-term trends in the characteristics of housing are evident from the New Housing Report:²⁵

- *Larger single-family units on smaller lots.* Between 1999 and 2017, the median size of new single-family dwellings increased by 20% nationally, from 2,028 sq. ft. to 2,426 sq. ft., and 20% in the western region from 2,001 sq. ft. in 1999 to 2,398 sq. ft. in 2017. Moreover, the percentage of new units smaller than 1,400 sq. ft. nationally, decreased by more than half, from 15% in 1999 to 6% in 2017. The percentage of units greater than 3,000 sq. ft. increased from 17% in 1999 to 25% of new one-family homes completed in 2017. In addition to larger homes, a move towards smaller lot sizes is seen nationally. Between 2009 and 2017, the percentage of lots less than 7,000 sq. ft. increased from 25% to 31% of lots.
- *Larger multifamily units.* Between 1999 and 2017, the median size of new multiple family dwelling units increased by 5.3% nationally and 2.4% in the Western region. Nationally, the percentage of new multifamily units with more than 1,200 sq. ft. increased from 28% in 1999 to 33% in 2017 and increased from 25% to 28% in the Western region.
- *Household amenities.* Across the U.S. and since 2013, an increasing number of new units had air-conditioning (fluctuating year by year at over 90% for both new single-family and multifamily units). In 2000, 93% of new single-family houses had two or more bathrooms, compared to 97% in 2017. The share of new multifamily units with two or more bathrooms decreased from 55% of new multifamily units to 45%. As of 2017, 65% of new single-family houses in the U.S. had one or more garages (from 69% in 2000).
- *Shared amenities.* Housing with shared amenities are growing in popularity as it may improve space efficiencies and reduce per unit costs / maintenance costs. Single-Room Occupancies (SROs)²⁶, Cottage Clusters, co-housing developments, and multifamily products are common housing types that take advantage of this trend. Shared amenities may take many forms and include shared: bathrooms; kitchens and other home appliances (e.g. laundry facilities, outdoor grills); security systems; outdoor areas (e.g. green space, pathways, gardens, rooftop lounges); fitness rooms, swimming pools, and tennis courts; and free parking.²⁷

²⁵ U.S. Census Bureau, Highlights of Annual 2017 Characteristics of New Housing. Retrieved from: <https://www.census.gov/construction/chars/highlights.html>.

²⁶ Single-room occupancies are residential properties with multiple single room dwelling units occupied by a single individual. From: U.S. Department of Housing and Urban Development. (2001). *Understanding SRO*. <https://www.hudexchange.info/resources/documents/Understanding-SRO.pdf>

²⁷ Urbsworks. (n.d.). Housing Choices Guide Book: A Visual Guide to Compact Housing Types in Northwest Oregon. https://www.oregon.gov/lcd/Publications/Housing-Choices-Booklet_DIGITAL.pdf

Saiz, Albert and Salazar, Arianna. (n.d.). Real Trends: The Future of Real Estate in the United States. Center for Real Estate, Urban Economics Lab.

State Trends

Oregon's 2016-2020 Consolidated Plan includes a detailed housing needs analysis as well as strategies for addressing housing needs statewide. The plan concludes that “a growing gap between the number of Oregonians who need affordable housing and the availability of affordable homes has given rise to destabilizing rent increases, an alarming number of evictions of low- and fixed- income people, increasing homelessness, and serious housing instability throughout Oregon.”

It identified the following issues that describe housing need statewide:²⁸

- For housing to be considered affordable, a household should pay up to one-third of their income toward rent, leaving money left over for food, utilities, transportation, medicine, and other basic necessities. Today, one in two Oregon households pays more than one-third of their income toward rent, and one in three pays more than half of their income toward rent.
- More school children are experiencing housing instability and homelessness. The rate of K-12 homeless children increased by 12% from the 2013-2014 school year to the 2014–2015 school year.
- Oregon has 28,500 rental units that are affordable and available to renters with extremely low incomes. There are about 131,000 households that need those apartments, leaving a gap of 102,500 units.
- Housing instability is fueled by an unsteady, low-opportunity employment market. Over 400,000 Oregonians are employed in low-wage work. Low-wage work is a growing share of Oregon's economy. When wages are set far below the cost needed to raise a family, the demand for public services grows to record heights.
- Women are more likely than men to end up in low-wage jobs. Low wages, irregular hours, and part-time work compound issues.
- People of color historically constitute a disproportionate share of the low-wage work force. About 45% of Latinx, and 50% of African Americans, are employed in low-wage industries.
- The majority of low-wage workers are adults over the age of 20, many of whom have earned a college degree, or some level of higher education.
- In 2019, minimum wage in Oregon²⁹ was \$11.25, \$12.50 in the Portland Metro, and \$11.00 for non-urban counties.

²⁸ These conclusions are copied directly from the report: *Oregon's 2016-2020 Consolidated Plan* <http://www.oregon.gov/ohcs/docs/Consolidated-Plan/2016-2020-Consolidated-Plan-Amendment.pdf>.

²⁹ The 2016 Oregon Legislature, Senate Bill 1532, established a series of annual minimum wage rate increases beginning July 1, 2016 through July 1, 2022. <https://www.oregon.gov/boli/whd/omw/pages/minimum-wage-rate-summary.aspx>

Oregon's 2018 Statewide Housing Plan identified six housing priorities to address in communities across the State over 2019 to 2023, summarized below. It includes relevant data to help illustrate the rationale for each priority. The 2018 Statewide Housing Plan describes the Oregon Housing and Community Services' (OHCS) goals and implementation strategies for achieving the goals.³⁰

- **Equity and Racial Justice.** Advance equity and racial justice by identifying and addressing institutional and systemic barriers that have created and perpetuated patterns of disparity in housing and economic prosperity.
 - Summary of the issue: In Oregon, 26% of people of color live below the poverty line in Oregon, compared to 15% of the White population.
 - 2019-2023 Goal: Communities of color will experience increased access to OHCS resources and achieve greater parity in housing stability, self-sufficiency and homeownership. OHCS will collaborate with its partners and stakeholders to create a shared understanding of racial equity and overcome systemic injustices faced by communities of color in housing discrimination, access to housing and economic prosperity.
- **Homelessness.** *Build a coordinated and concerted statewide effort to prevent and end homelessness, with a focus on ending unsheltered homelessness of Oregon's children and veterans.*
 - Summary of the issue: According to the Point-in-Time count, approximately 14,000 Oregonians experienced homelessness in 2017, an increase of nearly 6% since 2015. Oregon's unsheltered population increased faster than the sheltered population, and the state's rate of unsheltered homelessness is the third highest in the nation at 57%. The state's rate of unsheltered homelessness among people in families with children is the second highest in the nation at 52%.
 - 2019-2023 Goal: OHCS will drive toward impactful homelessness interventions by increasing the percentage of people who are able to retain permanent housing for at least six months after receiving homeless services to at least 85 percent. We will also collaborate with partners to end veterans' homelessness in Oregon and build a system in which every child has a safe and stable place to call home.
- **Permanent Supportive Housing.** *Invest in permanent supportive housing, a proven strategy to reduce chronic homelessness and reduce barriers to housing stability.*
 - Summary of the issue: Oregon needs about 12,388 units of permanent supportive housing to serve individuals and families with a range of needs and challenges.
 - 2019-2023 Goal: OHCS will increase our commitment to permanent supportive housing by funding the creation of 1,000 or more additional permanent

³⁰ Priorities and factoids are copied directly from the report: Oregon Housing and Community Services (November 2018). Breaking New Ground, Oregon's Statewide Housing Plan, Draft. <https://www.oregon.gov/ohcs/DO/shp/OregonStatewideHousingPlan-PublicReviewDraft-Web.pdf>

supportive housing units to improve the future long-term housing stability for vulnerable Oregonians.

- **Affordable Rental Housing.** *Work to close the affordable rental housing gap and reduce housing cost burden for low-income Oregonians.*
 - Summary of the issue: Statewide, over 85,000 new units are needed to house those households earning below 30% of Median Family Income (MFI) in units affordable to them. The gap is even larger when accounting for the more than 16,000 units affordable at 30% of MFI, which are occupied by households at other income levels.
 - 2019-2023 Goal: OHCS will triple the existing pipeline of affordable rental housing — up to 25,000 homes in the development pipeline by 2023. Residents of affordable rental housing funded by OHCS will have reduced cost burden and more opportunities for prosperity and self-sufficiency.
- **Homeownership.** *Provide more low- and moderate-income Oregonians with the tools to successfully achieve and maintain homeownership, particularly in communities of color.*
 - Summary of the issue: In Oregon, homeownership rates for all categories of people of color are lower than for white Oregonians. For White non-Latinx Oregonians, the home ownership rate is 63%. For Latinx and non-White Oregonians, it is 42%. For many, homeownership rates have fallen between 2005 and 2016.
 - 2019-2023 Goal: OHCS will assist at least 6,500 households in becoming successful homeowners through mortgage lending products while sustaining efforts to help existing homeowners retain their homes. OHCS will increase the number of homebuyers of color in our homeownership programs by 50% as part of a concerted effort to bridge the homeownership gap for communities of color while building pathways to prosperity.
- **Rural Communities.** *Change the way OHCS does business in small towns and rural communities to be responsive to the unique housing and service needs and unlock the opportunities for housing development.*
 - Summary of the issue: While housing costs may be lower in rural areas, incomes are lower as well: median family income is \$42,750 for rural counties versus \$54,420 for urban counties. Additionally, the median home values in rural Oregon are 30% higher than in the rural United States and median rents are 16% higher.
 - 2019-2023 Goal: OHCS will collaborate with small towns and rural communities to increase the supply of affordable and market-rate housing. As a result of tailored services, partnerships among housing and service providers, private industry and local governments will flourish, leading to improved capacity, leveraging of resources and a doubling of the housing development pipeline.

Regional and Local Demographic Trends that may affect housing need in Roseburg

Demographic trends that might affect the key assumptions used in the baseline analysis of housing need are: (1) the aging population, (2) changes in household size and composition, and (3) increases in diversity.

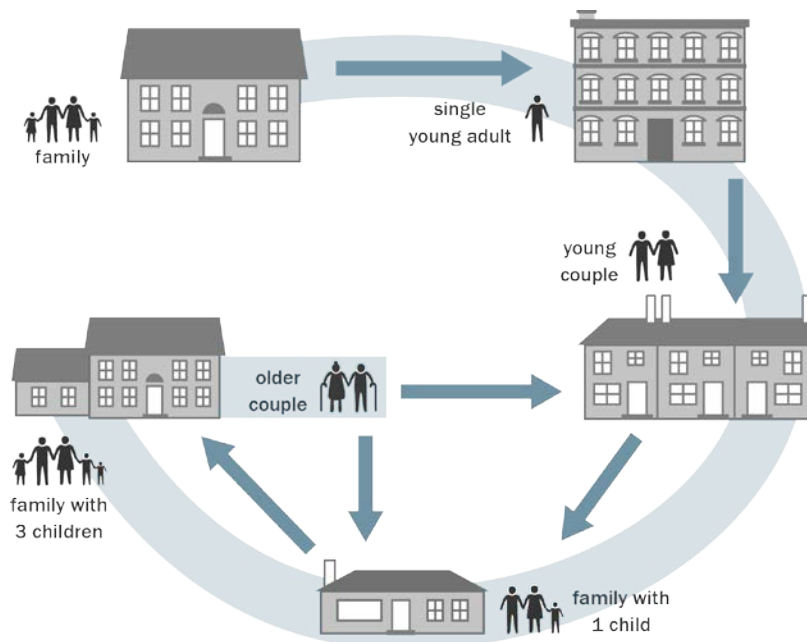
An individual's housing needs change throughout their life, with changes in income, family composition, and age. The types of housing needed by a 20-year-old college student differ from the needs of a 40-year-old parent with children, or an 80-year-old single adult. As Roseburg's population ages, different types of housing will be needed to accommodate older residents. The housing characteristics by age data below reveal this cycle in action in Roseburg.

Housing needs and preferences change in predictable ways over time, such as with changes in marital status and size of family.

Families of different sizes need different types of housing.

Exhibit 23. Effect of demographic changes on housing need

Source: ECONorthwest, adapted from Clark, William A.V. and Frans M. Dieleman. 1996. Households and Housing. New Brunswick, NJ: Center for Urban Policy Research.



Growing Population

Roseburg’s population growth will drive future demand for housing in the City over the planning period. Roseburg’s population (within the city limits) grew by 41% between 1990 and 2017. Roseburg added 6,983 new residents, at an average annual growth rate of 1.3%, consistent with statewide population average annual growth.

Exhibit 24. Population, Roseburg (city limits), Douglas County, and Oregon, 1990–2017

Source: U.S. Census Bureau, 1990, 2000, and 2010. Portland State University Population Estimates, 2017.

Geography					Change 1990 to 2017		
	1990	2000	2010	2017	Number	Percent	AAGR
Roseburg	17,032	20,017	21,790	24,015	6,983	41%	1.3%
Douglas County	94,649	100,399	105,240	111,180	16,531	17%	0.6%
Oregon	2,842,321	3,421,399	3,831,074	4,141,100	1,298,779	46%	1.4%

Roseburg’s population within its urban growth boundary is projected to grow by 5,515 people between 2019 and 2039, at an average annual growth rate of 0.84%.³¹

Exhibit 25. Forecast of Population Growth, Roseburg UGB, 2019 to 2039

Source: Oregon Population Forecast Program, Portland State University, Population Research Center.

30,256	35,771	5,515	18% increase
Residents in 2019	Residents in 2039	New residents 2019 to 2039	0.84% AAGR

Aging Population

This section shows two key characteristics of Roseburg’s population, with implications for future housing demand in Roseburg:

- **Seniors.** Roseburg currently has a smaller share of senior residents than Douglas County, but a larger share than the State average. As Roseburg’s senior population grows, it will have increasing demand for housing that is suitable for seniors.

Demand for housing for retirees will grow over the planning period, as the Baby Boomers continue to age and retire. The Douglas County forecast share of residents aged 60 years and older shows that seniors will account for 36% of the population by 2040, up from 29% in the 2012-2016 period.

The impact of growth in seniors in Roseburg will depend, in part, on whether older people already living in Roseburg continue to reside there as they retire and whether Roseburg attracts additional retirees and people nearing retirement. For example, there

³¹ This forecast of population growth is based on Roseburg’s urban growth boundary official population forecast from the Oregon Population Forecast Program. ECONorthwest extrapolated the population forecast for 2018 (to 2019) and 2035 (to 2039) based on the methodology specified in the following file (from the Oregon Population Forecast Program website):

http://www.pdx.edu/prc/sites/www.pdx.edu/prc/files/Population_Interpolation_Template.xlsx

are plans for expansion of housing on the Roseburg Veterans Affairs campus³² which may influence housing preferences for older veterans. National surveys show that, in general, most retirees prefer to age in place by continuing to live in their current home and community as long as possible.³³

- **Growth in the number of seniors will result in demand for housing types specific to seniors, such as small and easy-to-maintain dwellings, assisted living facilities, or age-restricted developments.** Senior households will make a variety of housing choices, including remaining in their homes as long as they are able, downsizing to smaller single-family homes (detached and attached) or multifamily units, or moving into group housing (such as assisted living facilities or nursing homes), as their health declines. The challenges aging seniors face in continuing to live in their community include changes in healthcare needs, loss of mobility, the difficulty of home maintenance, financial concerns, and increases in property taxes.³⁴
- **Roseburg and Douglas County have an equivalent proportion of younger people, which is similar to Oregon’s proportion.** About 22% of Roseburg’s population and 22% of Douglas County’s population is under 20 years of age. Twenty-four percent of Oregon’s population is under 20 years of age. The forecast for population growth in Douglas County shows the percent of people under 20 years growing by about 804 people but remaining relatively static, from 21% of the population in 2020 to 20% of the population by 2040.

People currently aged 19 to 39 are referred to as the Millennial generation and account for the largest share of population in Oregon. In 2020, Millennials will be between the ages of 20 and 40, and by 2040, they will be about 40 to 60 years of age. Douglas County’s population forecast by age group shows Millennials will grow from about 19% of the County’s total population in 2020 to about 24% of the population in 2040.

Roseburg’s ability to attract people in this age group will depend, in large part, on whether the city has opportunities for housing that both appeals to and is affordable to Millennials, as well as jobs that allow younger people to live and work in Roseburg. Retaining (or attracting) Millennials, such as those recently graduated from or attending school at the Umpqua Community College, will depend on availability of housing types (such as townhouses, cottages, duplexes and similar scale-multifamily housing, and apartments).

In the near-term, Millennials may increase demand for rental units. The long-term housing preference of Millennials is uncertain. Research suggests that Millennials’ housing preferences may be similar to the Baby Boomers, with a preference for smaller, less costly units. Recent surveys about housing preference suggest that Millennials want

³² For more information about Eagle Landing: <https://www.hadcor.org/general/page/eagle-landing-project-based-vouchers>

³³ A survey conducted by the AARP indicates that 90% of people 50 years and older want to stay in their current home and community as they age. See <http://www.aarp.org/research>.

³⁴ “Aging in Place: A toolkit for Local Governments” by M. Scott Ball.

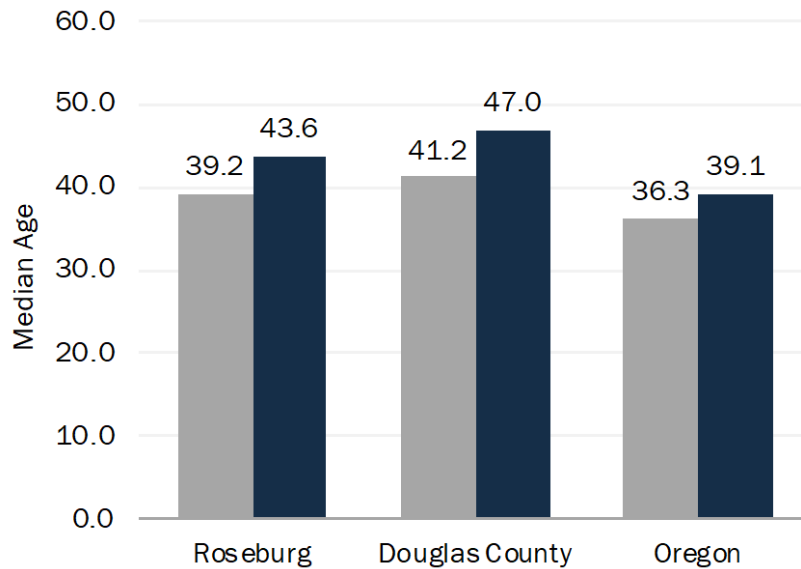
affordable single-family homes in areas that offer transportation alternatives to cars, such as suburbs or small cities with walkable neighborhoods.³⁵

Growth in Millennials in Roseburg will result in increased demand for both affordable single-family detached housing (including cottages), as well as increased demand for affordable townhouses and multifamily housing. Growth in this population will result in increased demand for both ownership and rental opportunities, with an emphasis on housing that is comparatively affordable. There is potential for attracting new residents to housing in Roseburg’s commercial areas, especially if the housing is relatively affordable and located in proximity to services.

Over 2000 to the 2012-2016 period, Roseburg’s median age increased by 4.4 years, from 39.2 to 43.6. This growth is smaller than Douglas County’s median age increase of 5.8 years, but larger than Oregon’s increase of 2.8 years.

Exhibit 26. Median Age, Roseburg City Limits, Douglas County, and Oregon, 2000 and 2012-2016

Source: U.S. Census Bureau, 2000 Decennial Census, Table B01002, and ACS 2012-2016 5-year estimates, Table B01002.



³⁵ The American Planning Association, “Investing in Place; Two generations’ view on the future of communities.” 2014.

“Access to Public Transportation a Top Criterion for Millennials When Deciding Where to Live, New Survey Shows,” Transportation for America.

“Survey Says: Home Trends and Buyer Preferences,” National Association of Home Builders International Builders

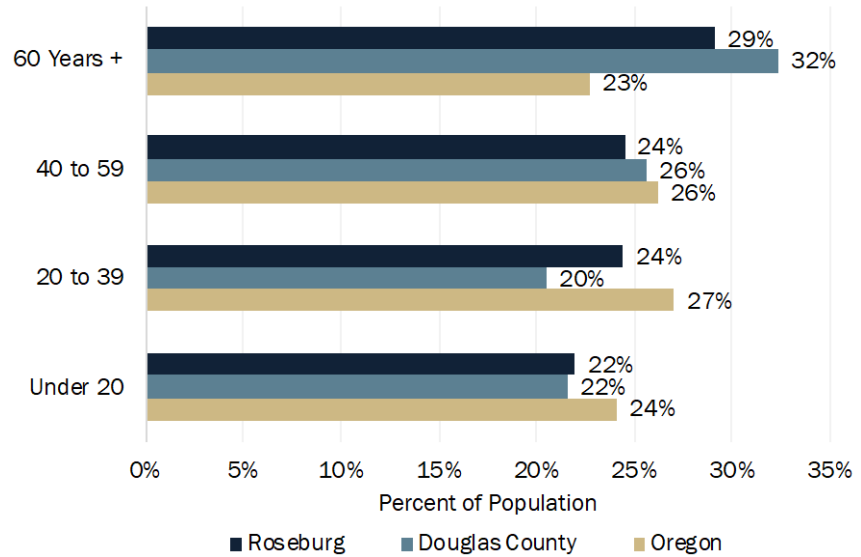
During the 2012-2016 period, about 48% of Roseburg's residents were between the ages of 20 and 59 years.

Roseburg had a smaller share of people over the age of 60 than Douglas County, but had a larger share relative to Oregon.

About 22% of Roseburg's and Douglas County's population was under 20 years of age, compared to 24% of Oregon's.

Exhibit 27. Population Distribution by Age, Roseburg City Limits, Douglas County, and Oregon, 2012-2016

Source: U.S. Census Bureau, ACS 2012-2016 5-year estimates, Table B01001.

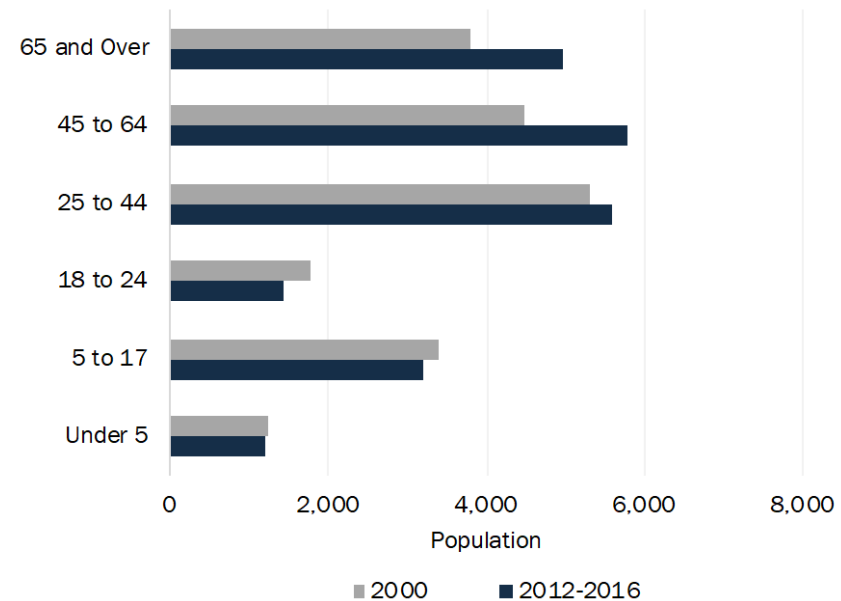


Between 2000 and the 2012-2016 period, the age groups in Roseburg with the largest growth were for those between the ages of 45 and 64 and those over 65 years of age.

Over the same time frame, the population size of those under 5 years of age, 5 to 17, and 18 to 24 decreased.

Exhibit 28. Roseburg City Limits Population Change by Age Category, 2000 and 2012-2016

Source: U.S. Census Bureau, 2000 Decennial Census Table P012, and ACS 2012-2016 5-year estimates, Table B01001.



Seniors (residents aged 60+ and older) will grow by 12% between 2020 to 2040, adding 4,845 residents in that time.

By 2040, it is forecasted that Douglas County residents over the age of 60 will make up 36% of the County's total population.

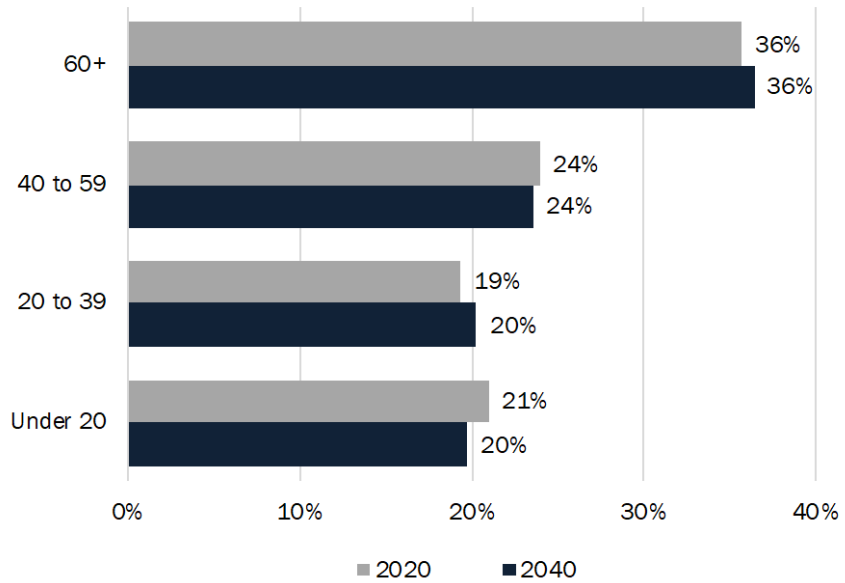
Exhibit 29. Forecasted Population Growth (including Percent Change) by Age Group, Douglas County, 2020–2040

Source: Portland State University, Population Research Center, Douglas County Forecast, 2018.

3%	15%	8%	12%
804 People	3,321 People	2,197 People	4,845 People
Under 20	20-39 Yrs	40-59 Yrs	60+ Yrs

Exhibit 30. Douglas County Population Change by Age Group, 2020–2040

Source: Portland State University, Population Research Center, Douglas County Forecast, 2018.



Increased Ethnic Diversity

Roseburg is becoming more ethnically diverse. The Latinx population grew from 4% of Roseburg's population in 2000 to 5% of the population in the 2012-2016 period, adding about 471 new Latinx residents. Still, Roseburg and Douglas County populations are less ethnically diverse than Oregon.

The U.S. Census Bureau forecasts that at the national level, the Latinx population will continue growing faster than most other non-Latinx populations between 2019 and 2039. The Census forecasts that the Latinx population will increase 93% from 2016 to 2060 and the foreign-born Latinx population will increase by about 40% in that same time.³⁶

Continued growth in the Latinx population will affect Roseburg's housing needs in a variety of ways.³⁷ Growth in first and, to a lesser extent, second and third generation Latinx immigrants, will increase demand for larger dwelling units to accommodate the, on average, larger household sizes for these households. Foreign-born households, including Latinx immigrants, are more likely to include multiple generations, requiring more space than smaller household sizes. As Latinx households integrate over generations, household size typically decreases, and housing needs become similar to housing needs for all households.

According to the *State of Hispanic Homeownership* report from the National Association of Hispanic Real Estate Professionals³⁸, Latinx accounted for 29% of the nation's household formation in 2017. Household formations, for Latinx homeowners specifically, accounted for 15% of the nation's net homeownership growth. The rate of homeownership for Latinx increased from 45% in 2014³⁹ to 46% in 2017. The only demographic that increased their rate of homeownership from 2016 to 2017 was Latinx.

The *State of Hispanic Homeownership* report also cites the lack of affordable housing products as a substantial barrier to homeownership. The report finds that Latinx households are more likely than non-Latinx households to be nuclear households, comprised of married couples with children, and multiple-generation households in the same home, such as parents and adult children living together.

These housing preferences—affordability and larger household size—will influence the Roseburg housing market as the Latinx population continues to grow. ⁴⁰ **Accordingly, growth in Latinx households will result in increased demand for housing of all types, both for ownership and rentals, with an emphasis on housing that is comparatively affordable.**

³⁶ U.S. Census Bureau, *Demographic Turning Points for the United States: Population Projections for 2020 to 2060*, pg. 7, https://www.census.gov/content/dam/Census/library/publications/2018/demo/P25_1144.pdf

³⁷ Pew Research Center. *Second-Generation Americans: A Portrait of the Adult Children of Immigrants*, February 7, 2013, Appendix 8, <http://www.pewsocialtrends.org/2013/02/07/appendix-1-detailed-demographic-tables/>.

National Association of Hispanic Real Estate Professionals. *2017 State of Hispanic Homeownership Report*, 2017.

³⁸ National Association of Hispanic Real Estate Professionals (2017). *2017 State of Hispanic Homeownership Report*.

³⁹ National Association of Hispanic Real Estate Professionals (2014). *2014 State of Hispanic Homeownership Report*.

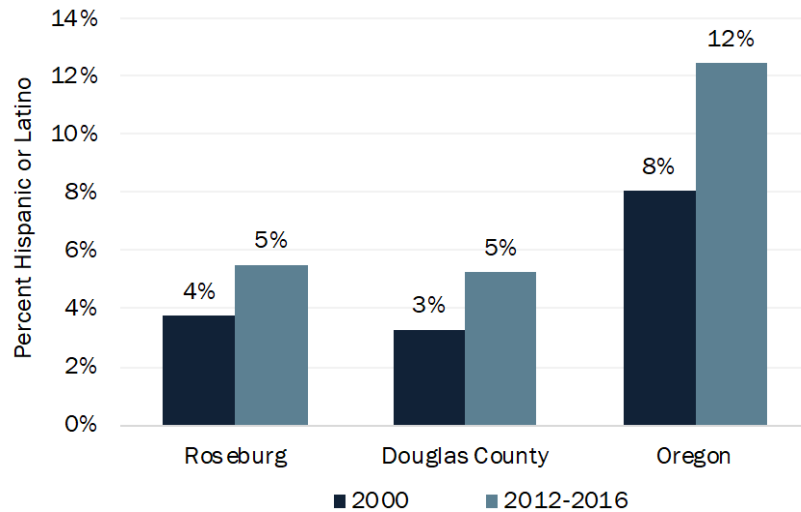
⁴⁰ National Association of Hispanic real Estate Professionals (2017). *2017 Sate of Hispanic Homeownership Report*.

Roseburg’s Latinx population grew by 1% over 2000 and the 2012-2016 period.

Roseburg is slightly more ethnically diverse than Douglas County, but less diverse than Oregon.

Exhibit 31. Latinx Population as a Percent of the Total Population, Roseburg City Limits, Douglas County, and Oregon, 2000 and 2012-2016

Source: U.S. Census Bureau, 2000 Decennial Census Table P008, and ACS 2012-2016 5-year estimates, Table B03002.



Household Size and Composition

Roseburg’s household size and composition show that households in Roseburg are different from Douglas County and statewide averages. Roseburg households tend to be smaller than Douglas County and Oregon households. Nearly half of Roseburg’s households were nonfamily households (i.e. roommates or 1-person households) and more than one-third of Roseburg’s households were single-person households, making Roseburg’s household composition different from the County and State averages. This difference suggests that Roseburg may need more housing suitable for single-person households and for non-family households, which maybe smaller units.

Roseburg’s average household size over 2013-2017 was smaller than both Douglas County’s and Oregon’s average household size.

Exhibit 32. Average Household Size, 2013-2017

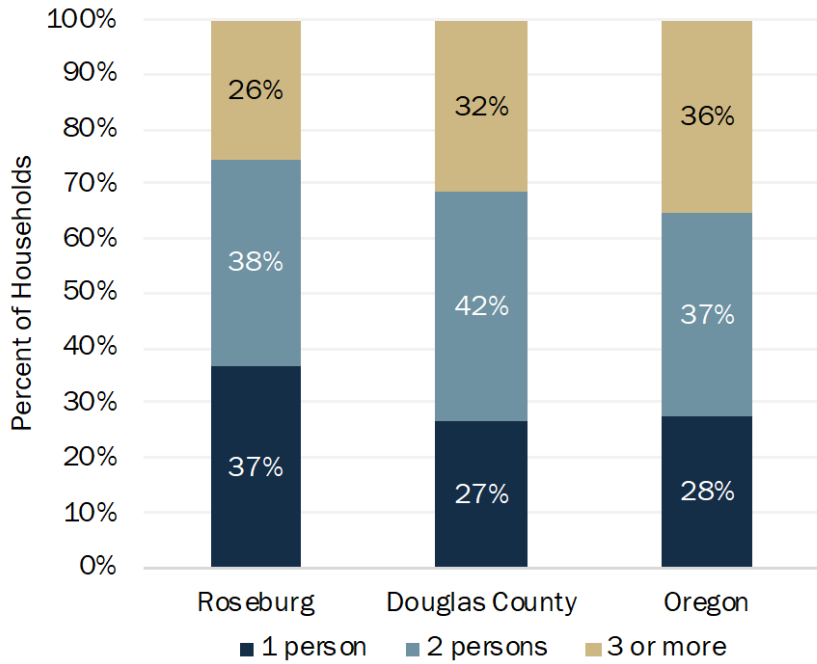
Source: U.S. Census Bureau, ACS 2013-2017 5-year estimates, Table B25010.



Roseburg has a larger share of 1-person households than the County and State.

Exhibit 33. Household Size, 2013-2017

Source: U.S. Census Bureau, ACS 2013-2017 5-year estimates, Table B25009.

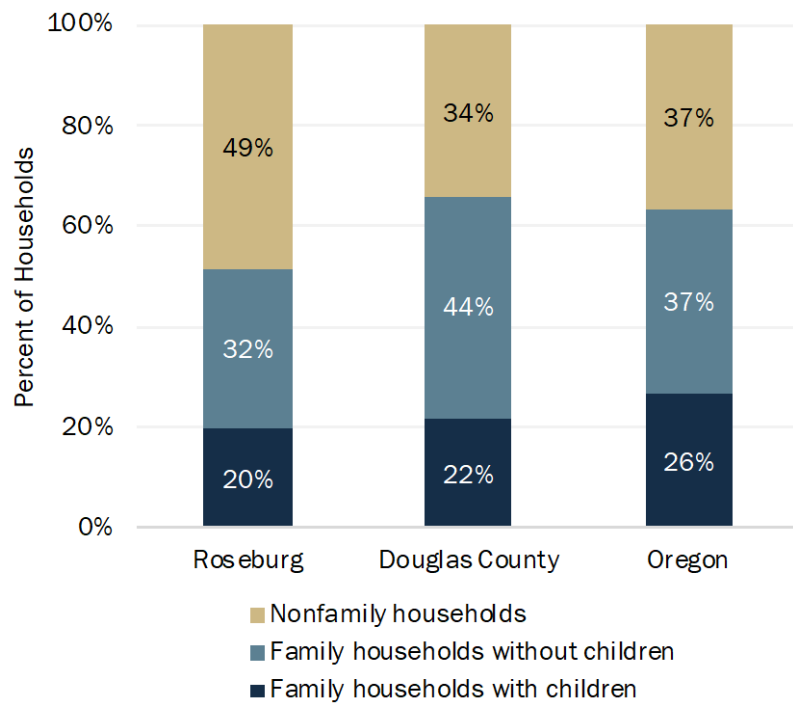


Roseburg has a larger share of nonfamily households than Douglas County and Oregon.

About 32% of Roseburg households do not have children, compared to 44% of Douglas County households and 37% of Oregon households.

Exhibit 34. Household Composition, Roseburg City Limits, Douglas County, and Oregon, 2012-2016

Source: U.S. Census Bureau, ACS 2012-2016 5-year estimates, Table DP02.



Income of Roseburg Residents

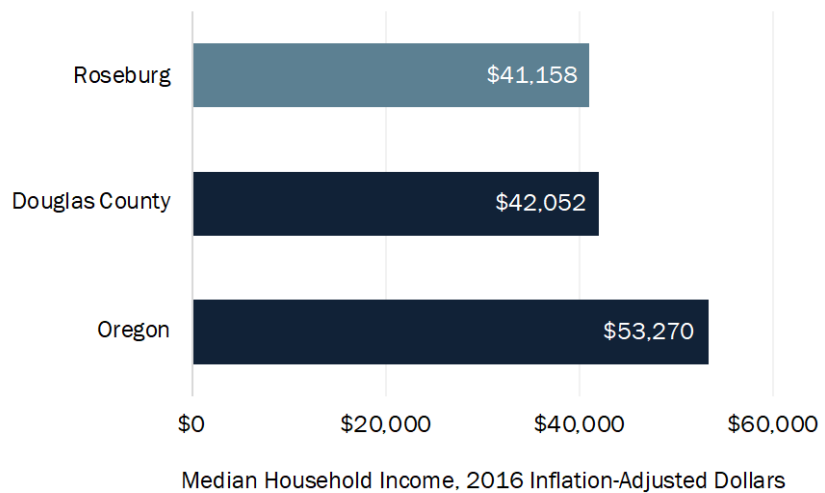
Income is one of the key determinants in housing choice and households' ability to afford housing. Income for residents living in Roseburg is lower than the Douglas County average and the State average. The prior section showed that Roseburg had more single-person households and this section shows that single-person households in Roseburg have income considerably below that of larger households.

Over the 2012-2016 period, Roseburg's median household income (MHI) was below that of the County and the State.

Over this period, Roseburg's MHI was \$41,158. Douglas County's MHI was \$42,052 and Oregon's MHI was \$53,270.

Exhibit 35. Median Household Income, Roseburg City Limits, Douglas County, and Oregon, 2012-2016

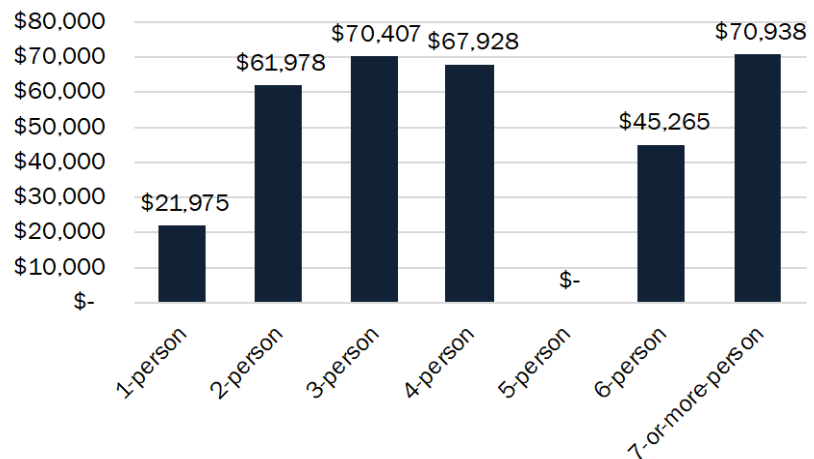
Source: U.S. Census Bureau, ACS 2012-2016 5-year estimates, Table B25119.



Median Household Income (MHI) for a 1-person household in Roseburg is about 32% of the MHI for a 4-person household.

Exhibit 36. Median Household Income by Household Size, Roseburg City Limits, 2013-2017

Source: U.S. Census Bureau, ACS 2013-2017 5-year estimates, Table B19019.



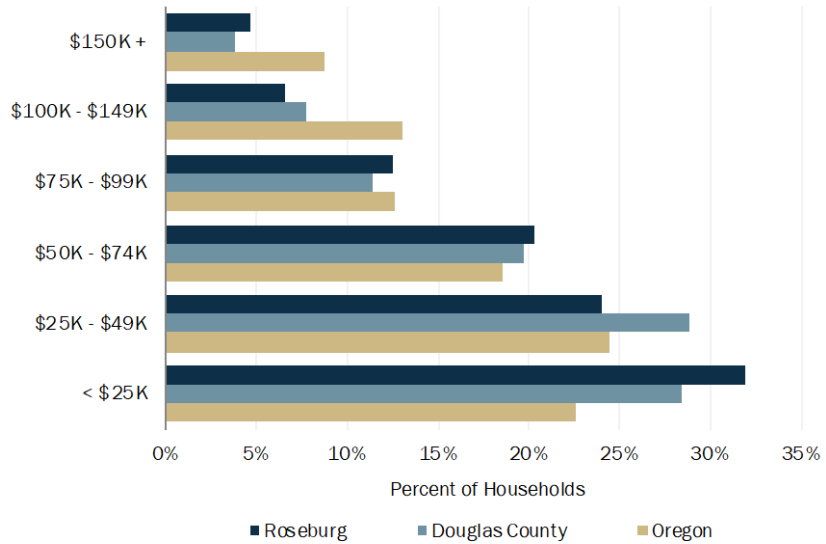
Roseburg had more households earning less than \$50,000 over the 2012-2016 period compared to the State.

About 56% of Roseburg households made less than \$50,000 per year, compared to 57% of Douglas County households, and 47% of Oregon households.

Similarly, Roseburg has fewer households earning more than \$75,000 compared to Oregon. The proportion of households earning this amount in Douglas County is comparable to Roseburg.

Exhibit 37. Household Income, Roseburg City Limits, Douglas County, and Oregon, 2012-2016

Source: U.S. Census Bureau, ACS 2012-2016 5-year estimates, Table B19001.

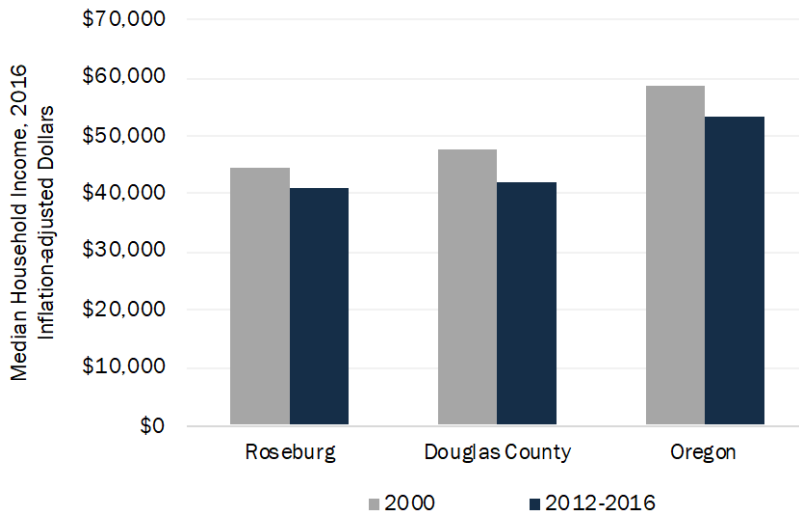


After adjusting for inflation, Roseburg’s MHI decreased by 7% over the 2000 to 2012-2016 period, from \$44,453 to \$41,158 per year.

Roseburg’s decline in MHI was smaller than both Douglas County (-12%) and Oregon (-9%).

Exhibit 38. Median Household Income, Roseburg City Limits, Douglas County, Oregon, 2000 and 2012-2016, 2016 Inflation-adjusted Dollars

Source: U.S. Census Bureau, 2000 Decennial Census, Table HCT012; ACS 2012-2016 5-year estimates, Table B25119.



Commuting Trends

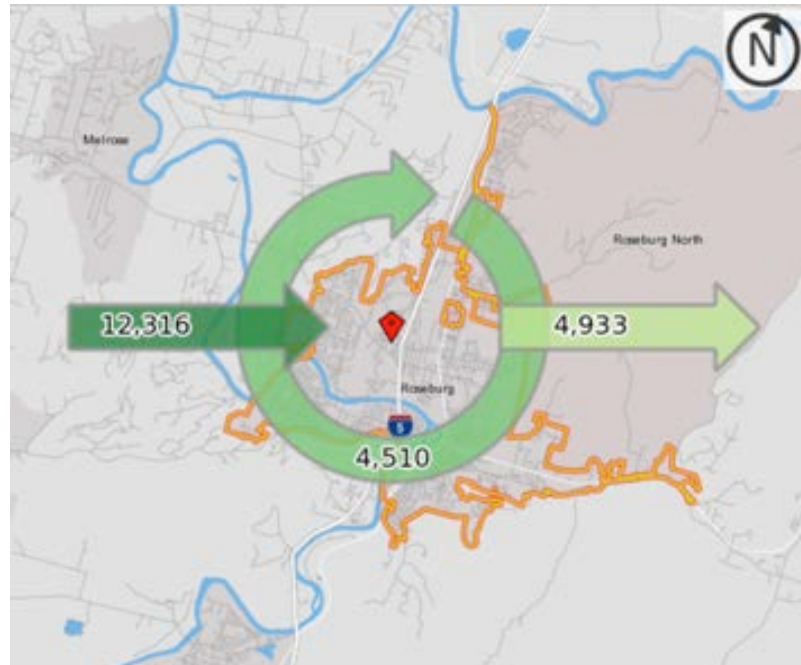
Roseburg is part of the complex, interconnected economy of Douglas County. Of the more than 16,800 people who work in Roseburg, about 73% of workers commute into Roseburg from other areas, most notably Green, Sutherlin, and Winston. More than 4,900 Roseburg residents commute out of the City for work, with many of them traveling to Eugene, Winston, Medford, and Sutherlin.

Roseburg is part of an interconnected regional economy.

More than 12,300 people commute into Roseburg for work, more than 4,900 residents commute out of the City for work, and more than 4,500 residents are both employed and reside in the City.

Exhibit 39. Commuting Flows, Roseburg City Limits, 2015

Source: U.S. Census Bureau, Census On the Map.



About 27% of people who work at businesses located in Roseburg also lived in Roseburg.

The remainder commute from Green, Sutherlin, and other parts of Douglas County.

Exhibit 40. Places Where Workers at Businesses in Roseburg Lived, 2015

Source: U.S. Census Bureau, Census On the Map.



About 48% of Roseburg residents both lived and worked in Roseburg.

The remainder commute to Eugene, Winston, Medford, Sutherlin and other cities across Douglas County.

Exhibit 41. Places Where Roseburg Residents were Employed, 2015

Source: U.S. Census Bureau, Census On the Map.

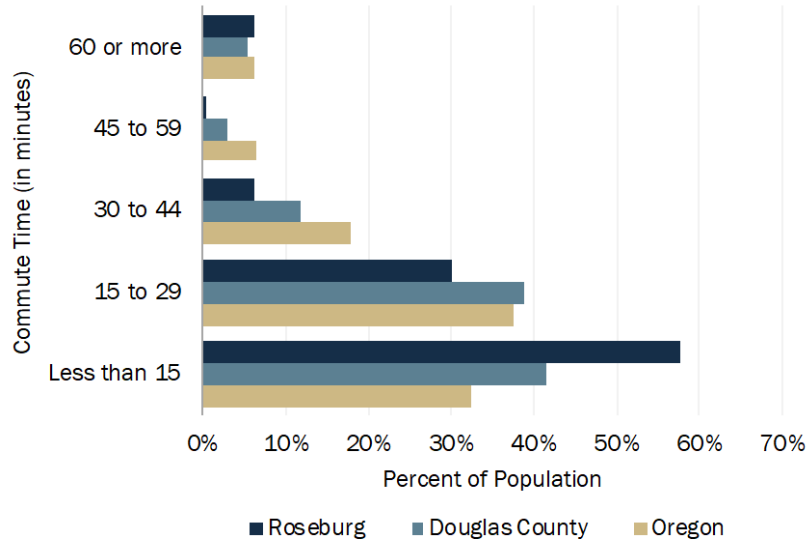


Most Roseburg residents (58%) have a commute time of less than 15 minutes.

Comparatively, 41% of Douglas County residents and 32% of Oregon residents have a commute time of less than 15 minutes.

Exhibit 42. Commute Time by Place of Residence, Roseburg City Limits, Douglas County, and Oregon, 2012-2016

Source: U.S. Census Bureau, ACS 2012-2016 5-year estimates, Table B08303.



Homelessness in Roseburg

This section summarizes findings from Roseburg’s *Homeless Population Study*, conducted by Kristina Smock Consulting in 2019. To view the full report, see Appendix B.

The 2019 Point-in-Time homelessness count found that 260 individuals, or 204 households, experienced homelessness in Roseburg.

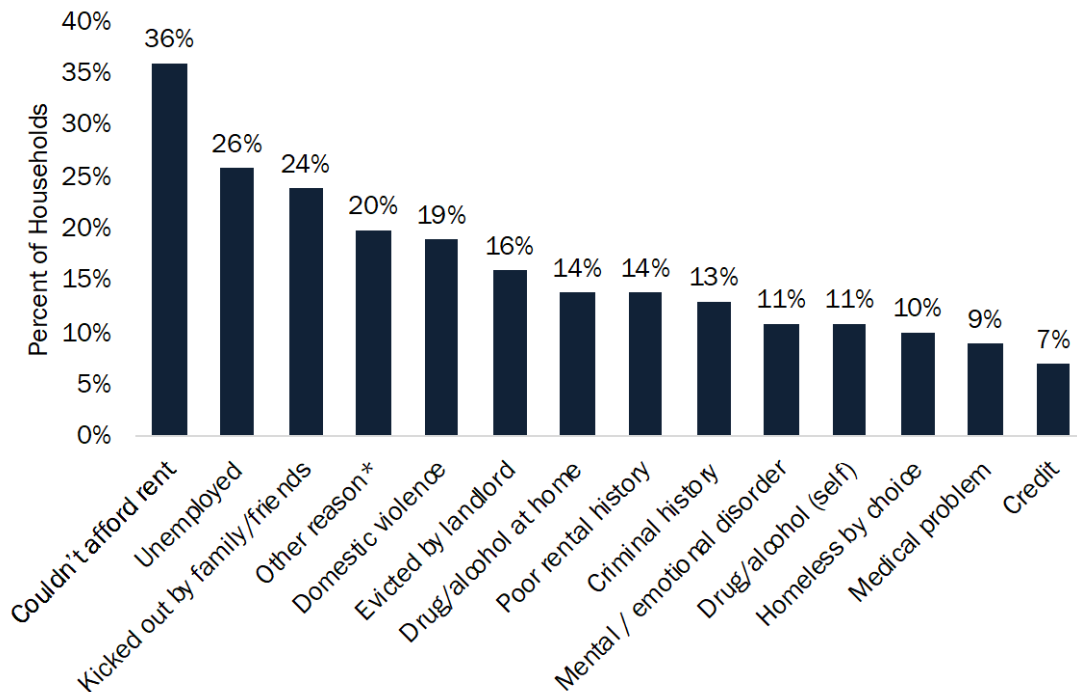
- **Of the 260 individuals experiencing homelessness:** 46% were unsheltered, 38% were in emergency shelters, and 14% were in transitional housing (2% unknown).
 - About a third of the individuals experiencing homelessness were chronically homeless (30%).⁴¹ A majority of these individuals were adults, but 10% were youth under the age of 18.
 - A majority of the individuals experiencing homelessness were male (52%), between the ages of 25 and 49 (52%), and Caucasian (83%).
 - Of the individuals experiencing homelessness, 12% identified as U.S. military veterans, 29% identified as victims of domestic violence, and 11% identified as released offenders.

⁴¹ HUD defines chronic homelessness as an individual adult or persons in households with children where one of the adults has a disabling condition and has been either continuously homeless for a year or more or has had at least four episodes of homelessness in the past three years that total to at least 12 months. To count as chronically homeless, a person has to currently be either unsheltered or in emergency shelter.

- **Of the 204 households experiencing homelessness:** 89% were adult-only households, 11% were households with children, and 1% were unaccompanied youth under the age of 18.
 - About half of the households experiencing homelessness did not report any monthly income (48%) and about a third received some government income benefits (32%).
 - About 74% of households were comprised of at least one household member with a disabling condition (such as a mental or chronic health condition, physical or development disability, alcohol/drug dependency, etc.).
 - About 62% of households cited an economic reason for experiencing homelessness (i.e. could not afford rent or unemployed), see Exhibit 43.

Exhibit 43. Reasons for Homelessness, Roseburg, 2019 Point-in-Time

Source: Kristina Smock Consulting. (2019). Roseburg Homelessness Population Study, Summary Report. Note1: respondents were able to identify more than one reason. Note2: The most common “other” reason was death of a partner, spouse, or family member. The second most common reason was separation, divorce, or end of a relationship.



Regional and Local Trends Affecting Affordability in Roseburg

This section describes changes in sales prices, rents, and housing affordability in Roseburg, Myrtle Creek, Sutherlin, Winston, Douglas County, and Oregon since 2000.

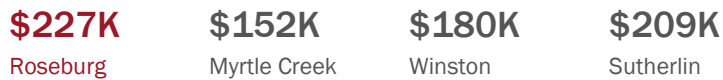
Changes in Housing Costs

With a median sales price of \$226,700 in 2018, Roseburg’s housing sales were generally higher compared to other cities in this analysis. Roseburg’s housing prices fluctuated with comparison cities over the January 2015 to December 2018 time frame and the City’s prices tended to remain above that of Myrtle Creek and Winston. During half of the months included in the home sales analysis period, however, Sutherlin’s median home sales price exceeded Roseburg’s.

Roseburg’s median home sales price was above that of all comparison cities in 2018.

Exhibit 44. Median Home Sale Price, Roseburg City Limits and Comparison Cities, 2018

Source: Douglas County Assessor.

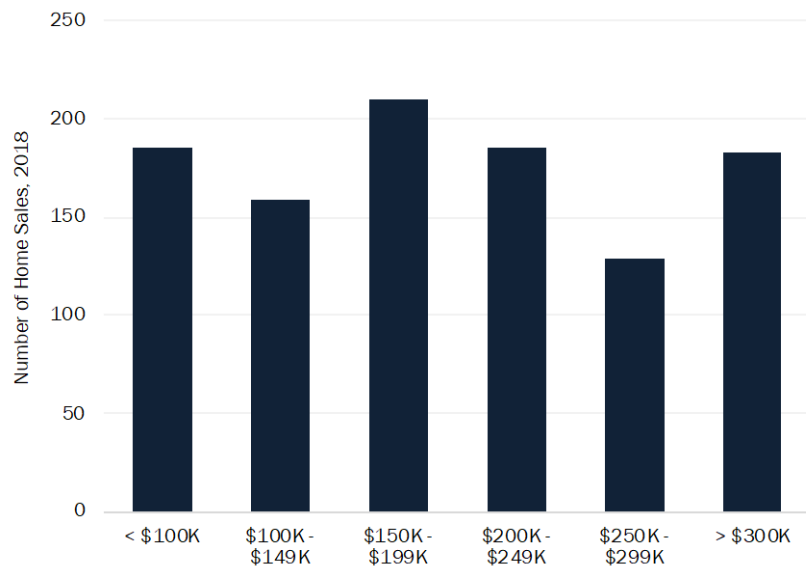


In 2018, about 28% of homes sold in Roseburg cost between \$150,000-\$249,999.

About 18% of homes sold for less than \$100,000, while 30% sold for more than \$250,000.

Exhibit 45. Distribution of Home Sale Prices, Roseburg City Limits, 2018

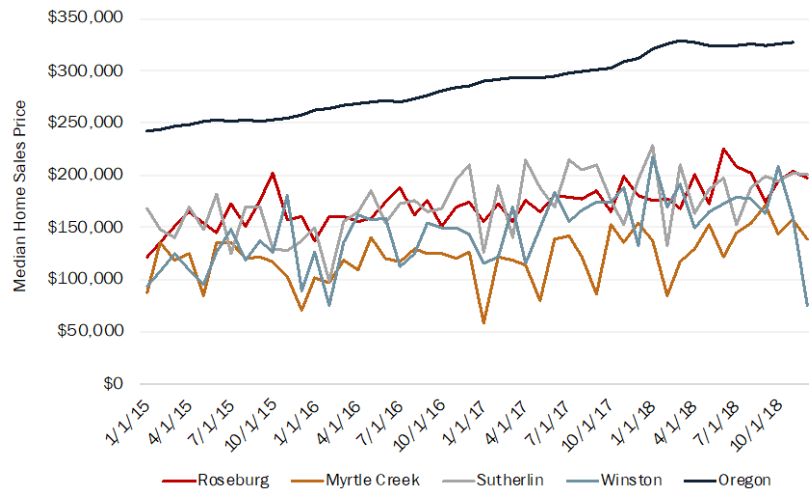
Source: Douglas County Assessor.



Between January 2015 and December 2018, home sales prices in Roseburg followed similar trends to other nearby cities but tended to be higher overall relative to Myrtle Creek and Winston.

Exhibit 46. Median Sales Price, Roseburg City Limits and Comparison Cities, January 2015 – December 2018

Source: Douglas County Assessor and Zillow.



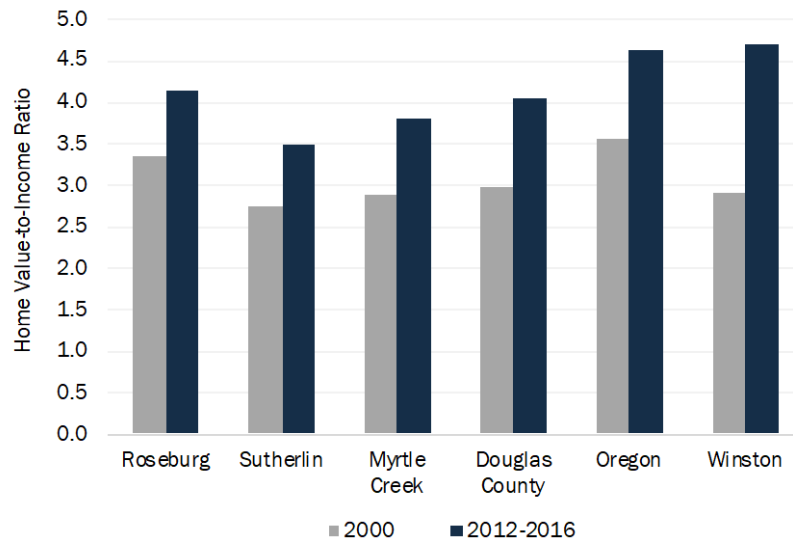
Since 2000, housing costs in Roseburg have increased and household incomes (when adjusted for inflation) have decreased over the 2012-2016 period, but to a lesser degree than for Douglas County and Oregon.

The household reported median value of a house in Roseburg was 3.3 times the median household income (MHI) in 2000, and 4.2 times MHI in the 2012-2016 period.

This decline of housing affordability was smaller in Roseburg than it was for Myrtle Creek and Winston, though the decline was comparable to Sutherlin.

Exhibit 47. Ratio of Median Housing Value to Median Household Income, Roseburg City Limits, Douglas County, Oregon, and Comparison Cities, 2000 to 2012-2016⁴²

Source: U.S. Census Bureau, 2000 Decennial Census, Tables HCT012 and H085, and ACS 2012-2016 5-year estimates, Tables B19013 and B25077.



⁴² This ratio compares the median value of housing in Roseburg (and other places) to the median household income. Inflation-adjusted median owner values in Roseburg increased from \$148,816 in 2000 to \$170,900 in 2012-2016. Over the same period, median income decreased from \$44,453 to \$41,158.

Rental Costs

Median gross rent in Roseburg is higher than the Douglas County average and lower than the statewide average. The following charts show gross rent (which includes the cost of rent plus utilities) for Roseburg in comparison to other cities in the region based on 2012-2016 Census data and the Douglas County Housing Authority's 2018 rent survey.

According to findings from the Housing Authority of Douglas County's rent survey, average rent in Roseburg is \$905 and median rent is \$825.

Exhibit 48. Average Gross Rents, Roseburg, 2018

Source: Housing Authority of Douglas County (HADCO), Rent Survey.

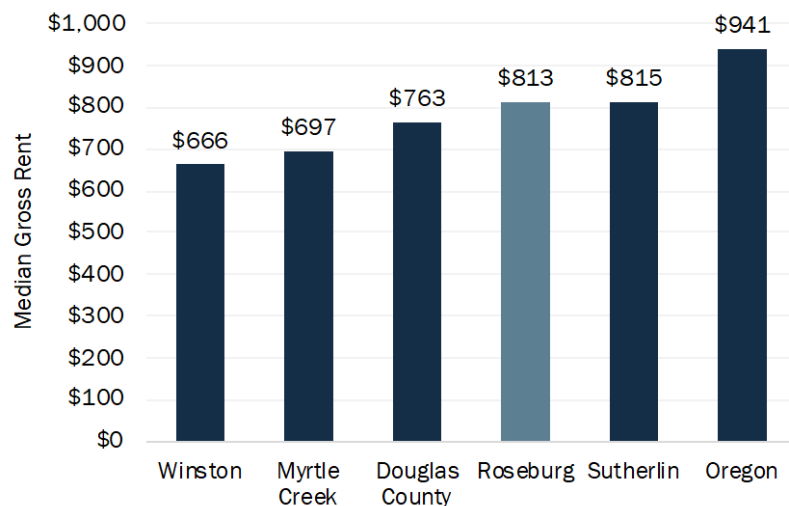
Studio	\$634
1 Bedroom	\$806
2 Bedroom	\$1,105
3 Bedroom	\$1,675
Average Overall	\$905
Median Overall	\$825

The median gross rent in Roseburg is \$813.

Rent in Roseburg is higher than Douglas County's median rent (\$763) and lower than Oregon's median rent (\$941).

Exhibit 49. Median Gross Rent, Roseburg City Limits, Douglas County, Oregon, and Comparison Cities, 2012-2016

Source: U.S. Census Bureau, ACS 2012-2016 5-year estimates, Table B25064.

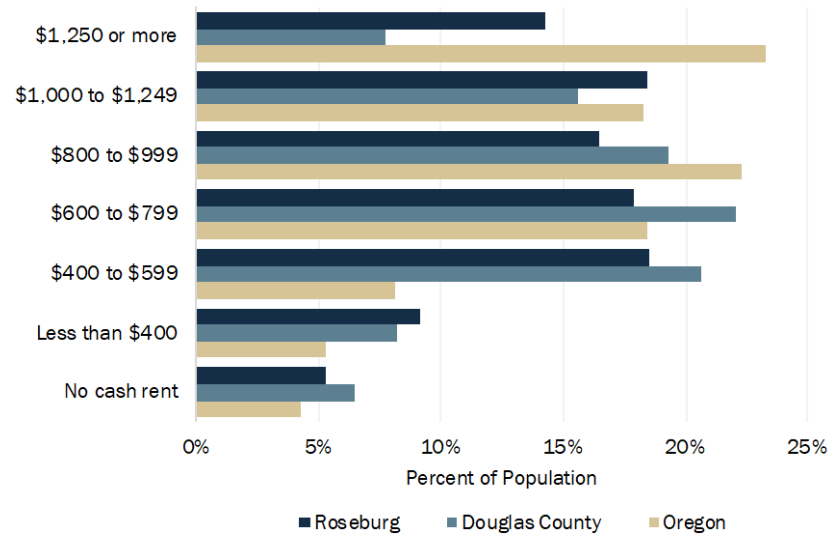


About 62% of renters in Roseburg pay less than \$1,000 per month compared to 70% of Douglas County renters and 54% of Oregon renters.

About 14% of Roseburg renters pay \$1,250 or more in gross rent per month, a smaller share than the State (23%), but a larger share than Douglas County (8%).

Exhibit 50. Gross Rent, Roseburg City Limits, Douglas County, and Oregon, 2012-2016

Source: U.S. Census Bureau, ACS 2012-2016 5-year estimates, Table B25063.



Housing Affordability

A typical standard used to determine housing affordability is that a household should pay no more than a certain percentage of household income for housing, including payments and interest or rent, utilities, and insurance. The Department of Housing and Urban Development’s 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.” Using cost burden as an indicator is one method of determining how well a city is meeting the Goal 10 requirement to provide housing that is affordable to all households in a community.

About 35% of all Roseburg households are cost burdened. About 55% of renter households are cost burdened, compared to 20% of homeowners. Overall, Roseburg has a slightly larger share of cost burdened households than Douglas County (34%) and Myrtle Creek (34%), but the City has a smaller share of cost-burdened household relative to Oregon (37%), Sutherlin (43%), and Winston (44%).

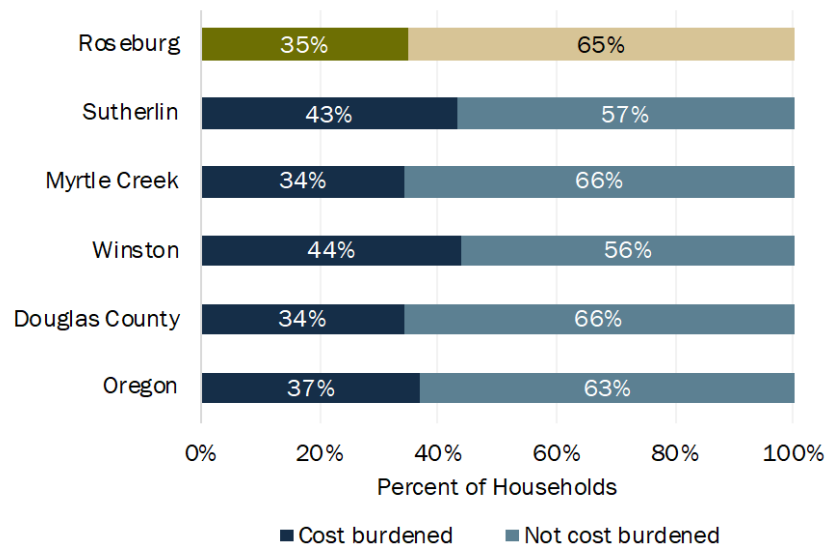
For example, about 32% of Roseburg’s households have an income of less than \$25,000 per year. These households can afford rent of less than \$625 per month, or a home with a value of less than \$62,500. Most, but not all, of these households are cost burdened.

Overall, about 35% of all households in Roseburg are cost burdened.

Roseburg has a smaller share of cost burdened households relative to Oregon, Sutherlin, and Winston, but a larger share relative to Myrtle Creek and Douglas County for the 2012-2016 period.

Exhibit 51. Housing Cost Burden, Roseburg City Limits, Douglas County, Oregon, and Comparison Cities, 2012-2016

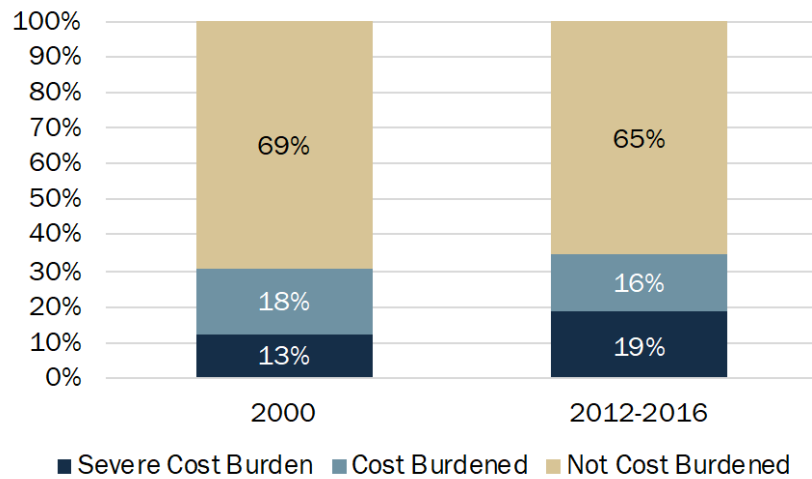
Source: U.S. Census Bureau, ACS 2012-2016 5-year estimates, Tables B25091 and B25070.



About 35% of Roseburg’s households are cost burdened or severely cost burdened, up slightly from 2000 (31%).

Exhibit 52. Change in Housing Cost Burden, Roseburg City Limits, 2000 and 2012-2016

Source: U.S. Census Bureau, Decennial Census 2000, Table H094 and ACS 2012-2016 5-year estimates, Tables B25091 and B25070.



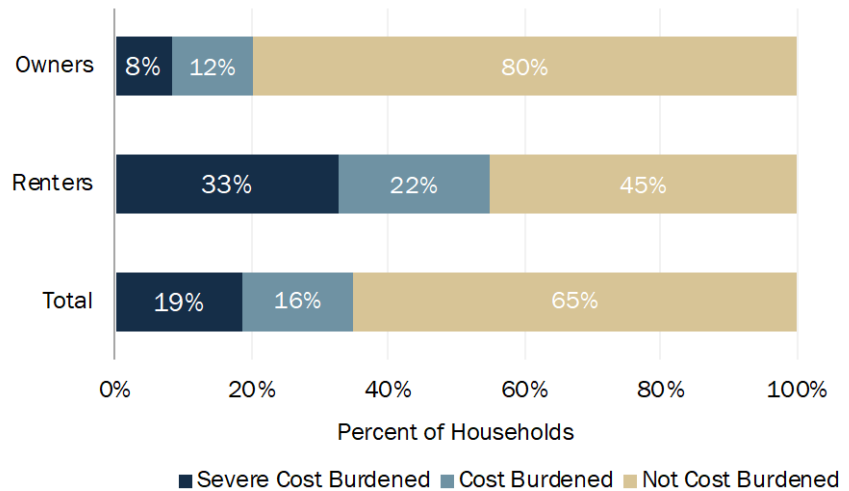
Renters are much more likely to be cost burdened than homeowners.

In the 2012-2016 period, about 55% of renters were cost burdened, compared to 20% of homeowners.

About 33% of Roseburg’s renters were severely cost burdened.

Exhibit 53. Housing Cost Burden by Tenure, Roseburg City Limits, 2012-2016

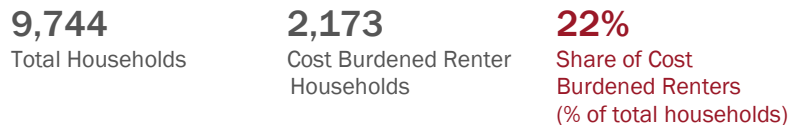
Source: U.S. Census Bureau, ACS 2012-2016 5-year estimates, Tables B25091 and B25070.



As of the 2012-2016 period, 22% of households in Roseburg were cost burdened renters.

Exhibit 54. Renter Cost Burden, Roseburg City Limits, 2012-2016

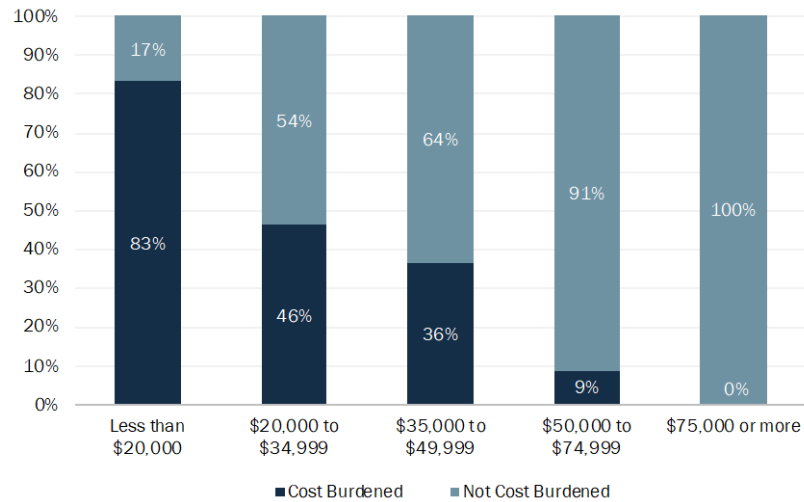
Source: U.S. Census Bureau, 2012-2016 ACS Tables B25091 and B25070.



Over 80% of households earning less \$20,000 are cost burdened.

Exhibit 55. Cost Burden by Income, Roseburg City Limits, 2012-2016

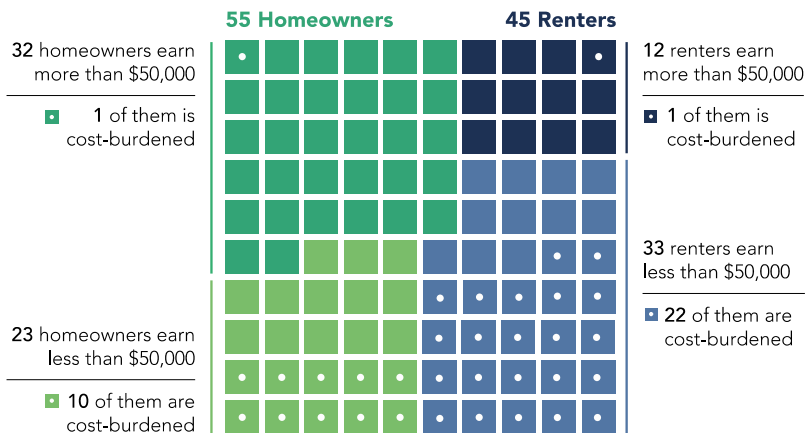
Source: U.S. Census Bureau, ACS 2012-2016 5-year estimates, Table S2503.



Cost burden rates also vary by income. Two-thirds of all renter households that earn less than \$50,000 per year are cost burdened.

Exhibit 56. Illustration of Cost Burden If all of Roseburg's Households were 100 Residents

Source: U.S. Census Bureau, ACS 2012-2016 5-year estimates, Table S2503.



While cost burden is a common measure of housing affordability, it does have some limitations. Two important limitations are:

- A household is defined as cost burdened if the housing costs exceed 30% of their income, regardless of actual income. The remaining 70% of income is expected to be spent on non-discretionary expenses, such as food or medical care, and on discretionary expenses. Households with higher incomes may be able to pay more than 30% of their income on housing without impacting the household's ability to pay for necessary non-discretionary expenses.
- Cost burden compares income to housing costs and does not account for accumulated wealth. As a result, the estimate of how much a household can afford to pay for housing

does not include the impact of a household’s accumulated wealth. For example, a household of retired people may have relatively low income but may have accumulated assets (such as profits from selling another house) that allow them to purchase a house that would be considered unaffordable to them based on the cost burden indicator.

Another way of exploring the issue of financial need is to review housing affordability at varying levels of household income.

Fair Market Rent for a 2-bedroom apartment in Douglas County is \$760.

Exhibit 57. HUD Fair Market Rent (FMR) by Unit Type, Douglas County, Fiscal Year 2018

Source: U.S. Department of Housing and Urban Development.

\$485	\$571	\$760	\$1,105	\$1,339
Studio	1-Bedroom	2-Bedroom	3-Bedroom	4-Bedroom

A household must earn at least \$14.62 per hour to afford a two-bedroom unit in Douglas County.

Exhibit 58. Affordable Housing Wage, Douglas County, 2018

Source: U.S. Department of Housing and Urban Development; Oregon Bureau of Labor and Industries.

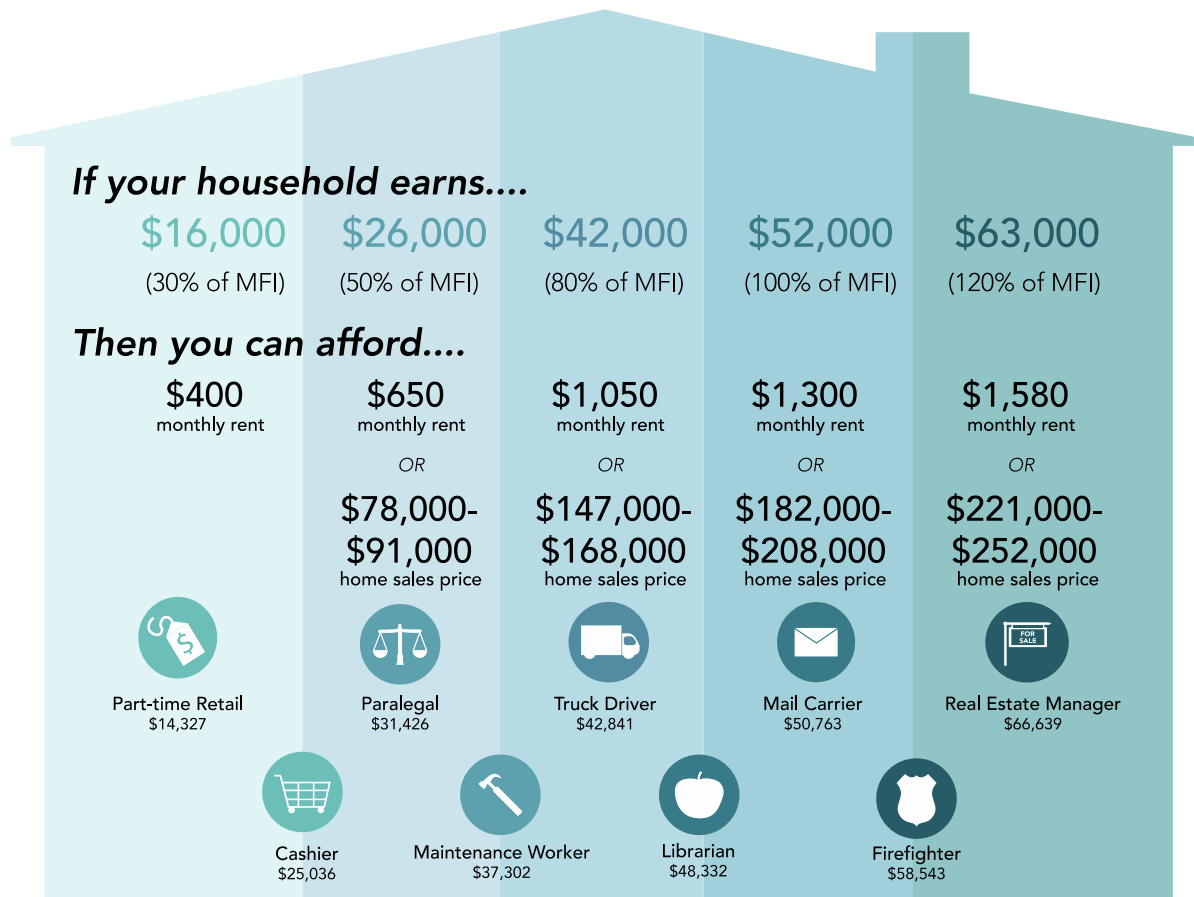
\$14.62/hour

Affordable Housing Wage for two-bedroom Unit in Douglas County

Exhibit 59 shows that a household earning the Median Family Income can afford a monthly rent of about \$1,300 or a home roughly valued between \$182,000 and \$208,000, which is less than the median home sales price in Roseburg of \$227,000 in 2018. Exhibit 60 shows that about one-third of Roseburg’s household earn less than 50% of MFI or \$26,000. These households are unable to afford the Fair Market Rent of \$760 per month for a 2-bedroom dwelling.

Exhibit 59. Financially Attainable Housing, by Median Family Income (MFI) for Douglas County (\$52,100), Roseburg City Limits, Fiscal Year 2018

Source: U.S. Department of Housing and Urban Development 2016. U.S. Census Bureau, ACS 2012-2016 5-year estimates, Table 19001. Oregon Employment Department. Note: MFI is Median Family Income, determined by HUD for Douglas County



Thirty-eight percent of Roseburg’s population, or over 3,000 residents, are extremely low or very low income (earning less than 50% of Median Family Income).

Exhibit 60. Share of Households, by Median Family Income (MFI) for Douglas County (\$52,100), Roseburg City Limits, 2016

Source: U.S. Department of Housing and Urban Development, Douglas County, 2018. U.S. Census Bureau, 2012-2016 ACS Table 19001. Note: MFI is Median Family Income, determined by HUD for Douglas County.

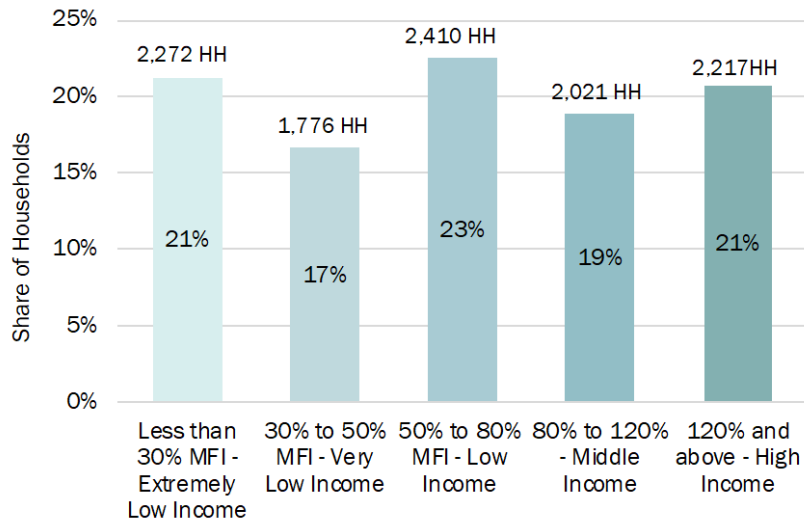


Exhibit 61 illustrates the types of financially attainable housing by income level in Douglas County. Generally speaking, however income households will be renters occupying existing housing. Newly built housing will be a combination of renters (most likely in multifamily housing) and owners. The types of housing affordable for the lowest income households is limited to government subsidized housing, manufactured housing, lower cost single-family housing and multifamily housing. The range of financially attainable housing increases with increased income.

Exhibit 61. Types of Financially Attainable Housing by Median Family Income (MFI) for Douglas County (\$52,100)

Source: ECONorthwest

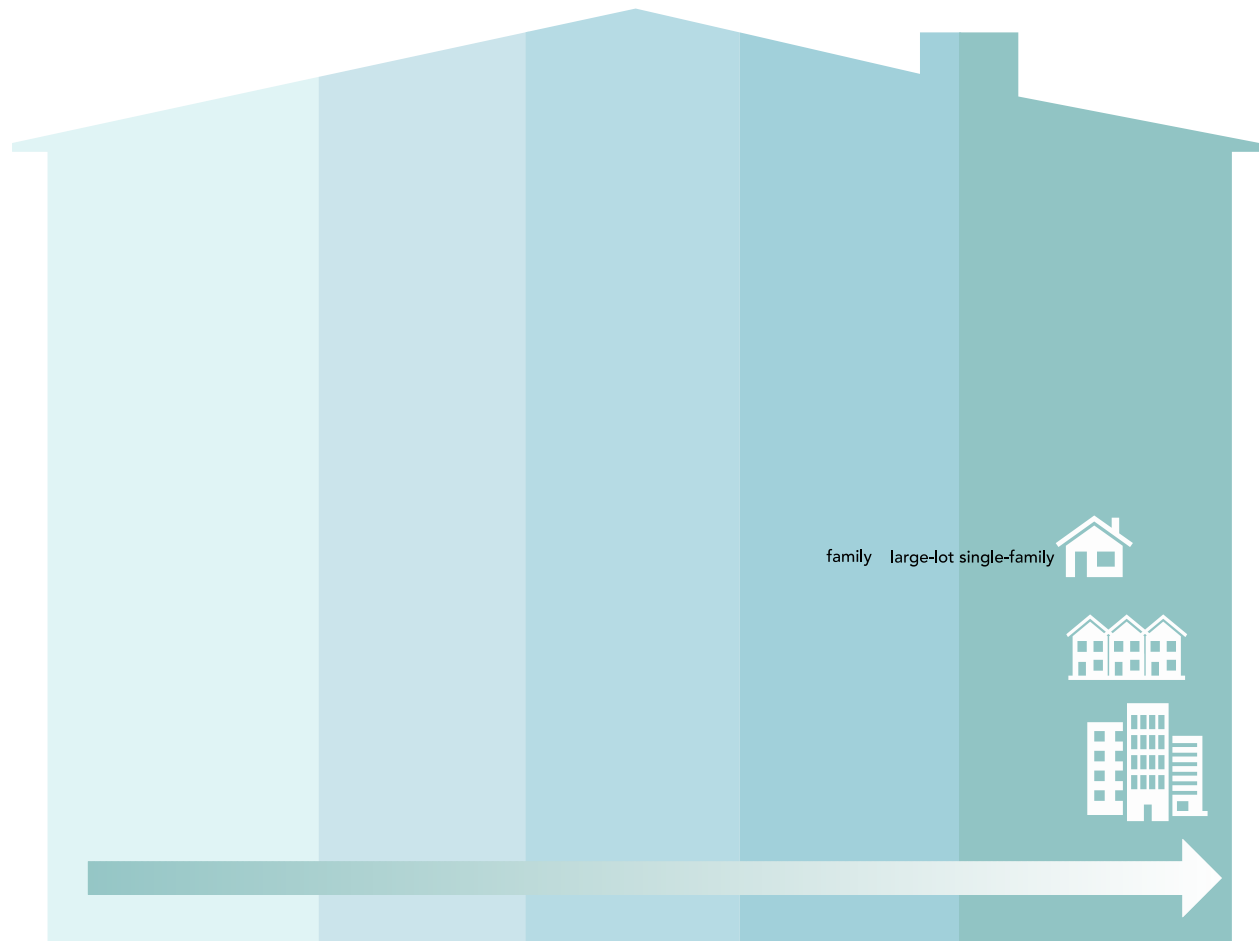
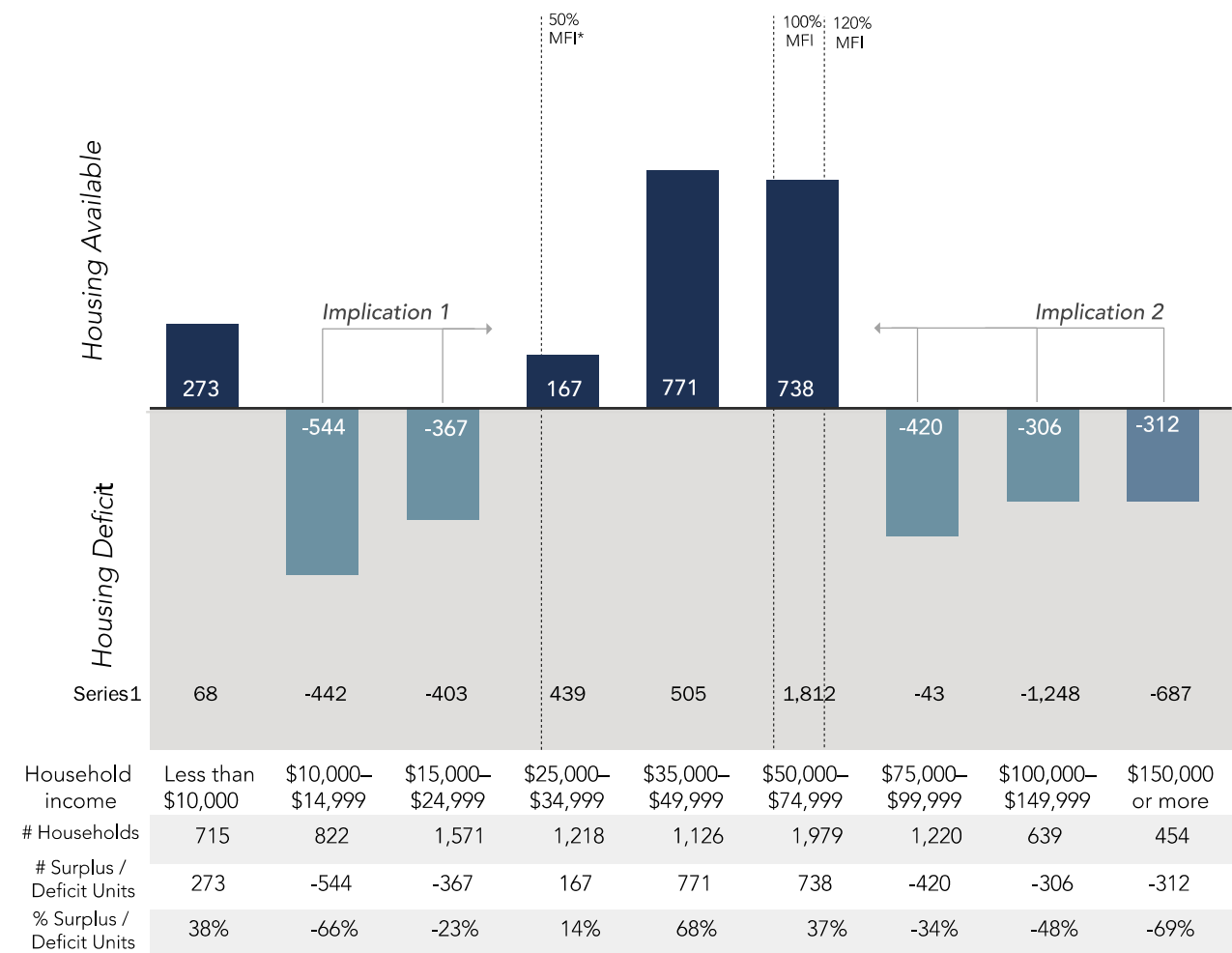


Exhibit 62 compares the number of households by income with the number of units affordable to those households in Roseburg. The data suggests that Roseburg currently has a deficit of housing affordable to households earning between \$10,000 and \$25,000 per year. The housing types that Roseburg has a deficit of are more affordable housing types such as existing lower-cost apartments, duplexes, tri- and quad-plexes, and manufactured housing.

Roseburg also has a need of higher-amenity housing, for households earning more than \$75,000 per year. Higher amenity housing types include single-family detached, townhomes, and higher-end multifamily products.

Exhibit 62. Affordable Housing Costs and Units by Income Level, Roseburg City Limits, 2016

Source: U.S. Census Bureau, 2012-2016 ACS. Note: MFI is Median Family Income, determined by HUD for Douglas County.



*Median Family Income for a family of four

Implication 1

Some lower-incomer households live in housing that is more expensive than they can afford because affordable housing is not available. These households are cost-burdened.

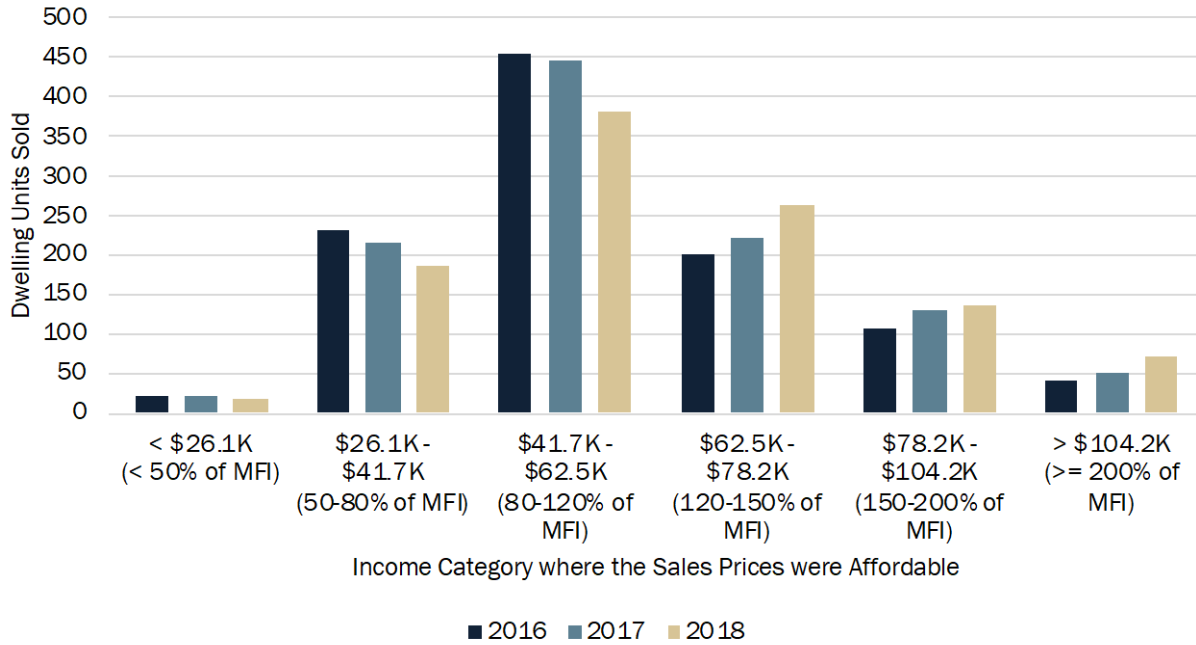
Implication 2

Some higher-income households choose housing that costs less than they can afford. This may be the result of the household's preference or it may be the result of lack of higher-cost and higher-amenity housing that would better suit their preferences.

Exhibit 45 shows the distribution of home sales prices for 2018. Exhibit 63 shows the distribution of home sales prices by affordability range for 2016, 2017, and 2018. Most housing sold in Roseburg in these years were affordable to households earning between 80% and 120% of the Median Family Income (MFI), or a household income of about \$41,680 to \$62,520.

Exhibit 63. Distribution of Home Sales Prices by Affordability Range, Roseburg, 2015, 2016, 2017

Source: Douglas County Assessor.



Summary of the Factors Affecting Roseburg's Housing Needs

The purpose of the analysis thus far has been to provide background on the kinds of factors that influence housing choice. While the number and interrelationships among these factors ensure that generalizations about housing choice are difficult to make and prone to inaccuracies, it is a crucial step to informing the types of housing that will be needed in the future.

There is no question that age affects housing type and tenure. Mobility is substantially higher for people aged 20 to 34. People in that age group will also have, on average, less income than people who are older and they are less likely to have children. These factors mean that younger households are much more likely to be renters, and renters are more likely to be in multifamily housing.

The data illustrates what more detailed research has shown and what most people understand intuitively: life cycle and housing choice interact in ways that are predictable in the aggregate; age of the household head is correlated with household size and income; household size and age of household head affect housing preferences; and income affects the ability of a household to afford a preferred housing type. The connection between socioeconomic and demographic factors and housing choice is often described informally by giving names to households with certain combinations of characteristics: the "traditional family," the "never-marrieds," the "dinks" (dual-income, no kids), and the "empty-nesters."⁴³ Thus, simply looking at the long wave of demographic trends can provide good information for estimating future housing demand.

Still, one is ultimately left with the need to make a qualitative assessment of the future housing market. The following is a discussion of how demographic and housing trends are likely to affect housing in Roseburg over the next 20 years:

- **Growth in housing will be driven by growth in population.** Between 1990 and 2017, Roseburg's population grew by 6,983 people (41%). The population in Roseburg's UGB is forecasted to grow from 30,256 to 35,771, an increase of 5,515 people (18%) between 2019 and 2039.⁴⁴
- **Housing affordability will be a growing challenge in Roseburg.** Housing affordability is a challenge in most of the region in general, and Roseburg is affected by these regional trends. Housing prices are increasing faster than incomes in Douglas County, which is consistent with state and national challenges. Roseburg has a larger share of multifamily housing (about 26% of the City's housing stock) relative to Douglas County, but an equivalent share relative to Oregon. In Roseburg, 55% of renter households are cost burdened. Roseburg's key challenge over the next 20 years is providing opportunities

⁴³ See *Planning for Residential Growth: A Workbook for Oregon's Urban Areas* (June 1997).

⁴⁴ This forecast is based on Douglas County's certified population estimate and official forecast from the Oregon Population Forecast Program for the 2019 to 2039 period, shown in Exhibit 25.

for development of relatively affordable housing of all types, from lower-cost single-family housing to market-rate multifamily housing.

- **Without substantial changes in housing policy, on average, future housing will look a lot like past housing.** That is the assumption that underlies any trend forecast, and one that is important when trying to address demand for new housing.

The City's residential policies can impact the amount of change in Roseburg's housing market, to some degree. If the City adopts policies to increase opportunities to build smaller-scale single-family and multifamily housing types (particularly multifamily that is affordable to low- and moderate-income households), a larger percentage of new housing developed over the next 20 years in Roseburg may begin to address the City's needs. Examples of policies that the City could adopt to achieve this outcome include: allowing a wider range of housing types (e.g., duplex or townhouses) in single-family zones, limiting single-family detached housing in multifamily zones, ensuring that there is sufficient land zoned to allow single-family attached multifamily housing development, supporting development of government-subsidized affordable housing, and encouraging multifamily residential development in downtown. The degree of change in Roseburg's housing market, however, will depend on market demand for these types of housing in Douglas County.

- **If the future differs from the past, it is likely to move in the direction, on average, of smaller units and more diverse housing types.** Most of the evidence suggests that the bulk of the change will be in the direction of smaller average house and lot sizes for single-family housing. This includes providing opportunities for development of smaller single-family detached homes, townhomes, and multifamily housing. Smaller units will accommodate the trend toward smaller households and non-family households in Roseburg.
- **Key demographic and economic trends** that will affect Roseburg's future housing needs are: (1) the aging of the Baby Boomers, (2) the aging of the Millennials, and (3) the continued growth in Latinx population.
 - *The Baby Boomer's population is continuing to age.* The changes that affect Roseburg's housing demand as the population ages are that household sizes and homeownership rates decrease. The majority of Baby Boomers are expected to remain in their homes as long as possible, downsizing or moving when illness or other issues cause them to move. Demand for specialized senior housing, such as age-restricted housing or housing in a continuum of care from independent living to nursing home care, may grow in Roseburg.
 - *Millennials will continue to age.* As Millennials age, generally speaking, their household sizes will increase, and their homeownership rates will peak by about age 55. Between 2019 and 2039, Millennials will be a key driver in demand for housing for families with children. The ability to attract Millennials will depend on the City's availability of affordable renter and ownership housing. It will also depend on the location of new housing in Roseburg as many Millennials prefer

to live in more urban environments.⁴⁵ The decline in homeownership among the Millennial generation has more to do with financial barriers rather than the preference to rent.⁴⁶

- *Latinx population will continue to grow.* Latinx population growth will be an important driver in growth of housing demand, both for owner- and renter-occupied housing. Growth in Latinx population will drive demand for housing for families with children. Given the lower income for Latinx households, especially first-generation immigrants, growth in this group will also drive demand for affordable housing, both for ownership and renting.

In summary, an aging population, increasing housing costs (although lower than the Region), housing affordability concerns for Millennials and the Latinx populations, and other variables are factors that support the conclusion of need for smaller and less expensive units and a broader array of housing choices.

⁴⁵ Choi, Hyun June; Zhu, Jun; Goodman, Laurie; Ganesh, Bhargavi; Stochak, Sarah. (2018). Millennial Homeownership, Why is it So Low, and How Can We Increase It? Urban Institute.

https://www.urban.org/research/publication/millennial-homeownership/view/full_report

⁴⁶ Ibid.

5. Housing Need in Roseburg

Project New Housing Units Needed in the Next 20 Years

The results of the housing needs analysis are based on: (1) the official population forecast for growth in Roseburg over the 20-year planning period, (2) information about Roseburg's housing market relative to Douglas County, Oregon, and nearby cities, and (3) the demographic composition of Roseburg's existing population and expected long-term changes in the demographics of Douglas County.

Forecast for Housing Growth

This section describes the key assumptions and presents an estimate of new housing units needed in Roseburg between 2019 and 2039. The key assumptions are based on the best available data and may rely on safe harbor provisions, when available.⁴⁷

- **Population.** A 20-year population forecast (in this instance, 2019 to 2039) is the foundation for estimating needed new dwelling units. Roseburg UGB will grow from 30,256 persons in 2019⁴⁸ to 35,771 persons in 2039, an increase of 5,515 people.⁴⁹
- **Persons in Group Quarters**⁵⁰. Persons in group quarters do not consume standard housing units: thus, any forecast of new people in group quarters is typically derived from the population forecast for the purpose of estimating housing demand. Group quarters can have a big influence on housing in cities with colleges (dorms), prisons, or a large elderly population (nursing homes). In general, any new requirements for these housing types will be met by institutions (colleges, government agencies, health-care corporations) operating outside what is typically defined as the housing market. Nonetheless, group quarters require residential land. They are typically built at densities

⁴⁷ A safe harbor is an assumption that a city can use in a housing needs analysis that the State has said will satisfy the requirements of Goal 14. OAR 660-024 defines a safe harbor as "... an optional course of action that a local government may use to satisfy a requirement of Goal 14. Use of a safe harbor prescribed in this division will satisfy the requirement for which it is prescribed. A safe harbor is not the only way, or necessarily the preferred way, to comply with a requirement and it is not intended to interpret the requirement for any purpose other than applying a safe harbor within this division."

⁴⁸ Portland State University's population forecast shows that in 2018, the Roseburg urban growth boundary had 30,092 people. We extrapolated from 2018 to get to 30,256 in 2019 using Portland State University's method, a required use.

⁴⁹ This forecast is based on Roseburg UGB's official forecast from the Oregon Population Forecast Program for the 2019 to 2039 period.

⁵⁰ The Census Bureau's definition of group quarters is as follows: A group quarters is a place where people live or stay, in a group living arrangement, that is owned or managed by an entity or organization providing housing and/or services for the residents. The Census Bureau classifies all people not living in housing units (house, apartment, mobile home, rented rooms) as living in group quarters. There are two types of group quarters: (1) Institutional, such as correctional facilities, nursing homes, or mental hospitals and (2) Non-Institutional, such as college dormitories, military barracks, group homes, missions, or shelters.

that are comparable to that of multifamily dwellings. The 2013-2017 American Community Survey shows that 44% of Roseburg’s population (967 people) was in group quarters. **For the 2019 to 2039 period, we assume that 4.4% of Roseburg’s new population, approximately 240 people, will be in group quarters.**

- **Household Size.** OAR 660-024 established a safe harbor assumption for average household size – which is the figure from the most-recent decennial Census at the time of the analysis. According to the 2013-2017 American Community Survey, the average household size in Roseburg was 2.12 people. **Thus, for the 2019 to 2039 period, we assume an average household size of 2.12 persons.**
- **Vacancy Rate.** The Census defines vacancy as: "unoccupied housing units are considered vacant. Vacancy status is determined by the terms under which the unit may be occupied, e.g., for rent, for sale, or for seasonal use only." The 2010 Census identified vacancy through an enumeration, separate from (but related to) the survey of households. The Census determines vacancy status and other characteristics of vacant units by enumerators obtaining information from property owners and managers, neighbors, rental agents, and others.

Vacancy rates are cyclical and represent the lag between demand and the market’s response to demand for additional dwelling units. Vacancy rates for rental and multifamily units are typically higher than those for owner-occupied and single-family dwelling units.

OAR 660-024 established a safe harbor assumption for vacancy rate – which is the figure from the most-recent decennial Census. According to the 2013-2017 American Community Survey. Roseburg’s vacancy rate was 7.6%. **For the 2019 to 2039 period, we assume a vacancy rate of 7.6%.**

Roseburg will have demand for 2,678 new dwelling units over the 20-year period, with an annual average of 134 dwelling units.

Exhibit 64. Forecast of demand for new dwelling units, Roseburg UGB, 2019 to 2039

Source: Calculations by ECONorthwest.

Variable	New Dwelling Units (2019-2039)
Change in persons	5,515
<i>minus</i> Change in persons in group quarters	240
<i>equals</i> Persons in households	5,275
Average household size	2.12
New occupied DU	2,488
<i>times</i> Aggregate vacancy rate	7.6%
<i>equals</i> Vacant dwelling units	190
Total new dwelling units (2019-2039)	2,678
Annual average of new dwelling units	134

Exhibit 64 presents a forecast of new housing in Roseburg’s UGB for the 2019 to 2039 period. This section determines the needed mix and density for the development of new housing developed over this 20-year period in Roseburg.

Over the next 20-years, the need for new housing developed in Roseburg will generally include a wider range of housing types and housing that is more affordable. This conclusion is based on the following information, found in Chapter 3 and 4:

- Roseburg’s housing mix, like Douglas County’s, is predominately single-family detached. In the 2013-2017 period, 70% of Roseburg’s housing was single-family detached, 4% was single-family attached, and 26% was multifamily. In comparison, the mix of housing for the County was 86% single-family detached, 3% single-family attached, and 12% multifamily.
- Demographic changes across Roseburg suggest increases in demand for single-family attached housing and multifamily housing. The key demographic trends that will affect Roseburg’s future housing needs are the aging of the Baby Boomers and household formation of the Millennials. The implications of the trends is increased demand for small older (often single-person) households and increased demand for affordable housing for families, both for ownership and rent.
- Household sizes in Roseburg have become smaller. About 75% of households in Roseburg are one-person or two-person households, compared with 69% of Douglas County households and 65% of Oregon households. About half of Roseburg households are non-family households (e.g. one-person households or roommates).
- Roseburg’s median household income was \$41,158, which is similar to the County’s median income. Approximately 56% of Roseburg’s households earn less than \$50,000 per year, compared to 57% in Douglas County and 47% in Oregon.
- About 35% of Roseburg’s households are cost burdened (paying 30% or more of their household income on housing costs).⁵¹ About 55% of Roseburg’s **renters** are cost burdened and about 20% of Roseburg’s **homeowners** are cost burdened. Cost burden rates in Roseburg are similar to those in Douglas County.
- Housing sales prices gradually increased in Roseburg over the last three years. From 2015 to 2018, the median housing sale price increased by about \$38,400 (20%), from about \$188,400 to \$226,800.
- Roseburg needs more affordable housing for renters. A household can start to afford Roseburg’s median rents at about 80% of Roseburg’s median household income. High cost burden rates for Roseburg renters suggests a need for more affordable housing types for renters. Little multifamily housing was built in Roseburg since 2007, which likely exacerbated the lack of affordable multifamily housing.

⁵¹ The Department of Housing and Urban Development’s 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.”

- Roseburg needs more affordable housing types for homeowners. A household earning 100% of Roseburg’s median household income (about \$41,00) could afford about \$1,025 per month in rent, compared with the median gross rent of \$813. This household could afford home valued between about \$143,500 to \$164,000, which is less than the median home sales price of about \$226,800 in Roseburg. A household can start to afford median home sale prices at about 170% of Roseburg’s median household income.

These factors suggest that Roseburg needs a broader range of housing types with a wider range of price points than are currently available in Roseburg’s housing stock. This includes providing opportunity for development of housing types across the affordability spectrum such as: single-family detached housing (e.g., small-lot single-family detached units, cottages, and “traditional” single-family), townhouses, duplexes, tri- and quad-plexes, and apartments.

Exhibit 65 shows a preliminary forecast of needed housing in the Roseburg UGB during the 2019 to 2039 period. The projection is based on the following assumptions:

- Roseburg’s official forecast for population growth shows that the City will add 5,515 people over the 20-year period. Exhibit 64 shows that the new population will result in need for 2,678 new dwelling units over the 20-year period.
- The assumptions about the mix of housing in Exhibit 65 are:
 - **About 60% of new housing will be single-family detached**, a category which includes manufactured housing. About 70% of Roseburg’s housing was single-family detached in the 2013-2017 period.
 - **Nearly 10% of new housing will be single-family attached**. About 4% of Roseburg’s housing was single-family attached in the 2013-2017 period.
 - **About 30% of new housing will be multifamily**. About 26% of Roseburg’s housing was multifamily in the 2013-2017 period.

Roseburg will have demand for 2,678 new dwelling units over the 20-year period, 60% of which will be single-family detached housing.

Exhibit 65. Forecast of demand for new dwelling units, Roseburg UGB, 2019 to 2039

Source: Calculations by ECONorthwest.

Variable	Needed Mix
Needed new dwelling units (2019-2039)	2,678
Dwelling units by structure type	
Single-family detached	
Percent single-family detached DU	60%
equals Total new single-family detached DU	1,607
Single-family attached	
Percent single-family attached DU	10%
equals Total new single-family attached DU	268
Multifamily	
Percent multifamily	30%
Total new multifamily	803
equals Total new dwelling units (2019-2039)	2,678

This analysis accounts for units accommodated by accessory dwelling units. Assumptions are documented here and presented in Exhibit 66 and Exhibit 67. For the purpose of this analysis, an accessory dwelling unit is a single-family detached housing type that is accommodated on developed parcels. To date, the City has not kept track of ADU permits, but anecdotal evidence suggests that few ADUs have occurred. **For the 2019 to 2039 period, we assume a development trajectory of one ADU per year, resulting in 20 ADUs over the 20-year analysis period.**

Over the 20-year period, Roseburg will accommodate 20 needed units through the development of accessory dwelling units (ADU). This will result in approximately one ADU per year.

Exhibit 66. Forecast of demand for ADUs, Roseburg UGB, 2019 to 2039

Source: Calculations by ECONorthwest.

Variable	New Dwelling Units (2019-2039)
New accessory dwelling units	20
Subset of total new dwelling units (2019-2039)	602

Over the 20-year period, Roseburg will accommodate 20 needed new units through ADUs. This results in Roseburg having demand for **2,658** new dwellings units on *vacant or partially vacant land*.

Exhibit 67. Forecast of demand for new dwelling units on vacant and partially vacant lands, Roseburg UGB, 2019 to 2039

Source: Calculations by ECONorthwest.

Variable	Needed Mix
Dwelling Units Accomodated by ADU	
Single-family detached	20
Single-family attached	
Multifamily	
Total Units in ADU or Redevelopment	
Dwelling Units Requiring Vacant or Partially Vacant	
Single-family detached	1,587
Single-family attached	268
Multifamily	803
Total Units Requiring Vacant or Partially Vacant Land	2,658

To summarize Exhibit 65, Exhibit 66, and Exhibit 67, Roseburg will have demand for 2,678 new dwelling units over the 20-year period. Of these 2,678 dwelling units, 1,607 dwelling units will be single-family detached housing (see Exhibit 65). Of these, 20 units will be accessory dwelling units (Exhibit 66) locating on existing lots or on lots with other newly built housing (not requiring a vacant parcel for the ADU). Accordingly, Roseburg will have demand for 1,587 single-family detached units on *vacant or partially vacant land* (Exhibit 67).

Exhibit 68 allocates needed housing to plan designations in Roseburg. The allocation is based, in part, on the types of housing allowed in the zones of each plan designation. Exhibit 68 shows:

- **Low Density Residential (R10, R.75, R6)** land will accommodate single-family detached housing (including manufactured housing) and duplexes.
- **Medium Density Residential (MR14, MR18)** land will accommodate single-family detached housing (including manufactured housing), single-family attached housing, duplexes, multifamily dwellings, and manufactured housing parks.
- **High Density Residential (MR29, MR40)** land will accommodate single-family detached housing (including manufactured housing), single-family attached housing, duplexes, and multifamily dwellings.

Exhibit 68. Allocation of needed housing by housing type and plan designation, Roseburg UGB, 2019 to 2039

Source: ECONorthwest.

Comprehensive Plan Designation	Residential Plan Designations			Total
	Low Density	Medium Density	High Density	
Dwelling Units				
Single-family detached	1,454	133	-	1,587
Single-family attached	-	162	106	268
Multifamily	93	266	444	803
Total	1,547	561	550	2,658
Percent of Units				
Single-family detached	55%	5%	0%	60%
Single-family attached	0%	6%	4%	10%
Multifamily	3%	10%	17%	30%
Total	58%	21%	21%	100%

Exhibit 69 shows the following densities, in net and gross acres.⁵² Exhibit 69 converts between net acres and gross acres to account for land needed for rights-of-way based on empirical analysis of existing rights-of-way by plan designation in Roseburg.

- **Low Density Residential:** 21% of land is in rights-of-way. The densities in this Plan Designation area are 3.7 dwelling units per net acre and 2.9 dwelling units per gross acre.
- **Medium Density Residential:** 22% of land is in rights-of-way. The densities in this Plan Designation area are 5.1 dwelling units per net acre and 3.9 dwelling units per gross acre.

⁵² OAR 660-024-0010(6) uses the following definition of net buildable acre. "Net Buildable Acre" "...consists of 43,560 square feet of residentially designated buildable land after excluding future rights-of-way for streets and roads." While the administrative rule does not include a definition of a gross buildable acre, using the definition above, a gross buildable acre will include areas used for rights-of-way for streets and roads. Areas used for rights-of-way are considered unbuildable.

- **High Density Residential:** 19% of land is in rights-of-way. The densities in this Plan Designation area are 11.1 dwelling units per net acre and 9.0 dwelling units per gross acre.

Exhibit 69. Future density for housing built in the Roseburg UGB, 2019 to 2039

Source: ECONorthwest. Note: DU is dwelling unit.

Plan Designation	Average Net Density (DU/Net Acre)	% for Rights-of-Way	Average Gross Density (DU/Gross Acre)
Low Density Residential	3.7	21%	2.9
Medium Density Residential	5.1	22%	3.9
High Density Residential	11.1	19%	9.0

Needed Housing by Income Level

The next step in the housing needs analysis is to develop an estimate of need for housing by income and housing type. This analysis requires an estimate of the income distribution of current and future households in the community. Estimates presented in this section are based on (1) secondary data from the Census, and (2) analysis by ECONorthwest.

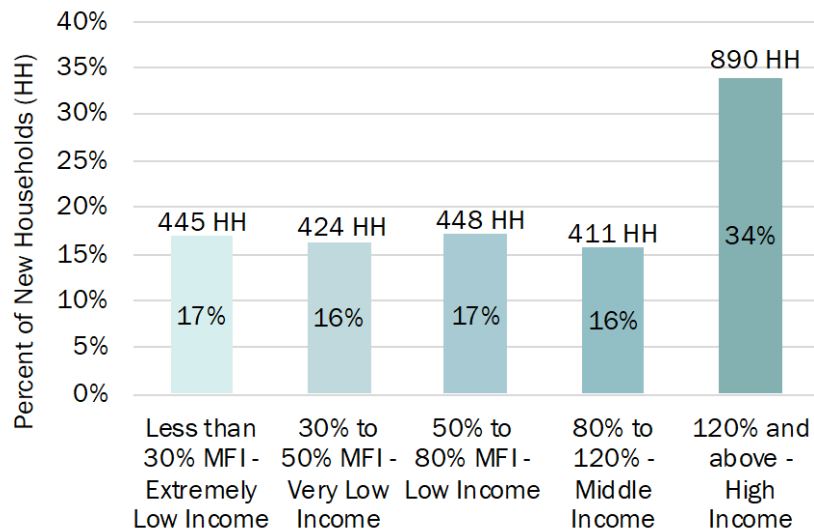
The analysis in the next Exhibit is based on American Community Survey data about income levels in Roseburg, using information shown in Exhibit 65. Income is categorized into market segments consistent with HUD income level categories, using Douglas County’s 2018 Median Family Income (MFI) of \$52,100. The Exhibit is based on current household income distribution, assuming that approximately the same percentage of households will be in each market segment in the future.

About 33% of Roseburg’s future households will have income below 50% of Douglas County’s median family income (less than \$26,050 in 2018 dollars) and about 33% will have incomes between 50% and 120% of the county’s MFI (between \$26,050 and \$62,520).

This graph shows that, Roseburg will continue to have need for affordable housing types, as well as higher-amenity housing types.

Exhibit 70. Future (New) Households, by Median Family Income (MFI) for Douglas County (\$52,100), Roseburg UGB, 2018

Source: U.S. Department of Housing and Urban Development. U.S. Census Bureau, 2012-2016 ACS Table 19001.



Need for Government-Assisted, Farmworker, and Manufactured Housing

ORS 197.303, 197.307, 197.312, and 197.314 requires cities to plan for government-assisted housing, farmworker housing, manufactured housing on lots, and manufactured housing in parks.

- **Government-subsidized housing.** Government-subsidies can apply to all housing types (e.g., single family detached housing, single-family attached housing, and multifamily housing products). Roseburg allows development of government-assisted housing in all residential plan designations, with the same development standards for market-rate housing. This analysis assumes that Roseburg will continue to allow government housing in all of its residential plan designations. Because government-assisted housing is similar in character to other housing (with the exception being the subsidies), it is not necessary to develop separate forecasts for government-assisted housing.
- **Farmworker housing.** Farmworker housing can also apply to all housing types and the City allows development of farmworker housing in all residential zones, with the same development standards as market-rate housing. This analysis assumes that Roseburg will continue to allow farmworker housing in all of its residential zones. Because it is similar in character to other housing (with the possible exception of government subsidies, if population restricted), it is not necessary to develop separate forecasts for farmworker housing.
- **Manufactured housing on lots.** Roseburg allows manufactured homes in all zones which allow single-family detached housing. Roseburg does not have special siting requirements for manufactured homes. Since manufactured homes are subject to the same siting requirements as site-built homes, it is not necessary to develop separate forecasts for manufactured housing on lots.
- **Manufactured housing in parks.** OAR 197.480(4) requires cities to inventory the mobile home or manufactured dwelling parks sited in areas planned and zoned or generally used for commercial, industrial, or high-density residential development. According to the Oregon Housing and Community Services' Manufactured Dwelling Park Directory,⁵³ Roseburg has 13 manufactured home parks within the City, with 1,044 spaces.
- ORS 197.480(2) requires Roseburg to project need for mobile home or manufactured dwelling parks based on: (1) population projections, (2) household income levels, (3) housing market trends, and (4) an inventory of manufactured dwelling parks sited in areas planned and zoned or generally used for commercial, industrial, or high density residential.

⁵³ Oregon Housing and Community Services, Oregon Manufactured Dwelling Park Directory, <http://o.hcs.state.or.us/MDPCRParcs/ParkDirQuery.jsp>

- Roseburg will grow by 2,678 dwelling units over the 2019 to 2039 period.
- Analysis of housing affordability shows that about 33% of Roseburg’s new households will be low income, earning 50% or less of the region’s median family income. One type of housing affordable to these households is manufactured housing.
- Manufactured housing in parks accounts for about 9.7% (about 1,044 dwelling units) of Roseburg’s current housing stock.
- National, state, and regional trends since 2000 showed that manufactured housing parks are closing, rather than being created. For example, between 2000 and 2015, Oregon had 68 manufactured parks close, with more than 2,700 spaces. Discussions with several stakeholders familiar with manufactured home park trends suggest that over the same period, few to no new manufactured home parks have opened in Oregon.
- The households most likely to live in manufactured homes in parks are those with incomes between \$15,630 and \$26,050 (30% to 50% of MFI), which include 16% of Roseburg’s households. However, households in other income categories may live in manufactured homes in parks.
- Manufactured home park development is an allowed use in the MR14 and MR18 zones. The national and state trends of closure of manufactured home parks, and the fact that no new manufactured home parks have opened in Oregon in over the last 15 years, demonstrate that development of new manufactured home parks in Roseburg is unlikely.
- Our conclusion from this analysis is that development of new manufactured home parks in Roseburg over the planning period is unlikely over the 2019 to 2039 period. It is, however, likely that manufactured homes will continue to locate on individual lots in Roseburg. The forecast of housing assumes that no new manufactured home parks will be opened in Roseburg over the 2019 to 2039 period. The forecast includes new manufactured homes on lots in the category of single-family detached housing.
- Over the next 20 years (or longer) one or more manufactured home parks may close in Roseburg. This may be a result of manufactured home park landowners selling or redeveloping their land for uses with higher rates of return, rather than lack of demand for spaces in manufactured home parks. Manufactured home parks contribute to the supply of low-cost affordable housing options, especially for affordable homeownership.

While there is statewide regulation of the closure of manufactured home parks

designed to lessen the financial difficulties of this closure for park residents,⁵⁴ the City has a role to play in ensuring that there are opportunities for housing for the displaced residents. The City's primary roles are to ensure that there is sufficient land zoned for new multifamily housing and to reduce barriers to residential development to allow for development of new, relatively affordable housing. The City may use a range of policies to encourage development of relatively affordable housing, such as allowing a wider range of moderate density housing in lower density zones, designating more land for multifamily housing, removing barriers to multifamily housing development, using tax credits to support affordable housing production, or partnering with a developer of government-subsidized affordable housing.

⁵⁴ ORS 90.645 regulates rules about closure of manufactured dwelling parks. It requires that the landlord must do the following for manufactured dwelling park tenants before closure of the park: give at least one year's notice of park closure, pay the tenant between \$5,000 to \$9,000 for each manufactured dwelling park space, and refrain from charging tenants for demolition costs of abandoned manufactured homes.

6. Residential Land Sufficiency within Roseburg

This chapter presents an evaluation of the sufficiency of vacant residential land in Roseburg to accommodate expected residential growth over the 2019 to 2039 period. This chapter includes an estimate of residential development capacity (measured in new dwelling units) and an estimate of Roseburg’s ability to accommodate needed new housing units for the 2019 to 2039 period, based on the analysis in the housing needs analysis. The chapter ends with a discussion of the conclusions and recommendations for the housing needs analysis.

Capacity Analysis

The buildable lands inventory summarized in Chapter 2 (and presented in full in Appendix A) provides a *supply* analysis (buildable land by type), and Chapter 5 provided a *demand* analysis (population and growth leading to demand for more residential development). The comparison of supply and demand allows the determination of land sufficiency.

There are two ways to calculate estimates of supply and demand into common units of measurement to allow their comparison: (1) housing demand can be converted into acres, or (2) residential land supply can be converted into dwelling units. A complication of either approach is that not all land has the same characteristics. Factors such as zone, slope, parcel size, and shape can affect the ability of land to accommodate housing. Methods that recognize this fact are more robust and produce more realistic results. This analysis uses the second approach: it estimates the ability of vacant residential lands within the UGB to accommodate new housing. This analysis, sometimes called a “capacity analysis,”⁵⁵ can be used to evaluate different ways that vacant residential land may build out by applying different assumptions.

⁵⁵ There is ambiguity in the term *capacity analysis*. It would not be unreasonable for one to say that the “capacity” of vacant land is the maximum number of dwellings that could be built based on density limits defined legally by plan designation or zoning, and that development usually occurs—for physical and market reasons—at something less than full capacity. For that reason, we have used the longer phrase to describe our analysis: “estimating how many new dwelling units the vacant residential land in the UGB is likely to accommodate.” That phrase is, however, cumbersome, and it is common in Oregon and elsewhere to refer to that type of analysis as “capacity analysis,” so we use that shorthand occasionally in this memorandum.

Roseburg Capacity Analysis Results

The capacity analysis estimates the development potential of vacant residential land to accommodate new housing, based on the needed densities by the housing type categories shown in Exhibit 69.

Exhibit 71 shows that **Roseburg’s vacant land has capacity to accommodate approximately 3,749 new dwelling units**, based on the following assumptions:

- **Buildable residential land.** The capacity estimates start with the number of buildable acres in residential Plan Designations as shown in Chapter 2.
- **Historic densities.** The capacity analysis assumes development will occur at historic densities. Those densities were derived from the densities shown in Exhibit 69.

Exhibit 71. Estimate of residential capacity on unconstrained vacant and partially vacant buildable land, Roseburg UGB, 2019

Source: Buildable Lands Inventory; Calculations by ECONorthwest. Note: DU is dwelling unit.

Plan Designation	Total	Density	Capacity
	Unconstrained Buildable Acres	Assumption (DU/Gross Acre)	(Dwelling Units)
Low Density Residential	885	2.9	2,567
Medium Density Residential	155	3.9	604
High Density Residential	64	9.0	578
Total	1,105	3.3	3,749

Stakeholders have expressed concerns about the development capacity of Low-Density Residential land on slopes of 12% to 24.9%. Exhibit 9 shows that Roseburg has 568 acres of Low Density Residential on these slopes. If we assume that these lands develop at 2.0 dwelling units per gross acre, rather than the 2.9 dwelling units per gross acre shown in Exhibit 71, Low Density Residential would have capacity for 2,055 new dwelling units, roughly 500 fewer dwelling unit than Exhibit 71 shows.

It is not unreasonable to expect that all of the 885 vacant, unconstrained land in Low Density Residential will develop at an average of 2.9 dwelling units per acre. Other cities in Oregon have development on moderate slopes (like 12% to 24.9% slopes) at densities around 3.0 dwelling units per acre. However, developing housing on slopes is generally more expensive than developing comparable housing on flat land. The large amount of land in moderate slopes in Roseburg (64% of the vacant land in Low Density Residential) may inhibit development of housing affordable to Roseburg’s households.

In addition, the lack of urban infrastructure (roads, municipal water, and sewer) to many areas with slopes make development of these lands much more expensive and complex, especially if the developer is paying for infrastructure. If the developer is able to develop fewer dwelling units per acre on slopes, which is generally the case, the costs of infrastructure on a per unit

basis will be higher because there are fewer units to spread infrastructure costs among. In addition, infrastructure on slopes may be more expensive than on flat land, with requirements for additional infrastructure (such as pumping stations) and higher costs of building roads.

The sloped areas in Roseburg have not developed over the last 40 years, likely as a result of being more expensive to develop and lacking infrastructure. Supporting development on sloped lands may require a significant policy intervention, such as subsidizing the costs of infrastructure or other interventions.

Residential Land Sufficiency

The next step in the analysis of the sufficiency of residential land within Roseburg is to compare the demand for housing by Plan Designation (Exhibit 68) with the capacity of land by Plan Designation (Exhibit 71). Exhibit 72 shows that Roseburg does have sufficient land to accommodate housing development, in each plan designation, but particularly in low density residential areas.

For Low Density Residential, even if development occurred at lower densities than those shown in Exhibit 71 (resulting in capacity of 2,567 dwelling units, as discussed on the prior page), Roseburg would have a surplus of about 847 dwelling units in Low Density Residential.

Exhibit 72. Preliminary Comparison of capacity of existing residential land with demand for new dwelling units and land surplus or deficit, Roseburg UGB, 2019 to 2039

Source: Buildable Lands Inventory; Calculations by ECONorthwest. Note: DU is dwelling unit.

Plan Designation	Capacity (Dwelling Units)	Demand (Dwelling Units)	Remaining Capacity (Dwelling Units)	Land Surplus or (Deficit) Gross Acres
Low Density Residential	2,567	1,547	1,020	352
Medium Density Residential	604	561	43	11
High Density Residential	578	550	28	3
Total	3,749	2,658	1,091	366

The capacity analysis (Exhibit 71) assumes that all partially vacant land may subdivide and develop over the next 20-years. That may be an optimistic assumption, given that some landowners may prefer not to subdivide their parcels at all and others may wait until land values and housing prices are significantly higher. If no partially vacant land develops over the next 20-years, Roseburg will not have enough Medium and High Density land to accommodate growth. If no partially vacant Low Density land develops and land on slopes develop at a slower pace or at lower densities, Roseburg may have insufficient land for Low Density development.

For the 2019 to 2039 planning period, 240 group quarters units were deducted from the housing forecast (see Exhibit 65). The analysis must account for their land need. At a density of about 9.0 dwelling units per gross acre,⁵⁶ group quarters will need approximately 27 gross acres of residential lands. For purposes of this analysis, new group quarters are assumed to occur on High Density residential lands. Exhibit 72 shows Roseburg’s surplus of 27 gross acres of High-Density Residential lands. Exhibit 73 shows that, after deducting the 27 gross acres of land for group quarters, Roseburg has no surplus or deficit of high-density residential lands.

Exhibit 73. Land Needed for Group Quarters, Roseburg UGB, 2019 to 2039

Source: Calculations by ECONorthwest. *Note: Group quarters assumes one person per dwelling unit.

Variable	Assumption
New Population in Group Quarters	240
Needed Dwelling Units for Group Quarters	240
Gross Density Assumption (multifamily)	9.0
Needed Gross Acres for Group Quarters (High Density Res.)	(27)
Existing Gross Acres (High Density Res.)	27
Revised Land Sufficiency, gross acres, (High Density Res.)	0

For clarity, Exhibit 74 presents a revised version of Exhibit 72 to account for land needed for group quarters. In summary:

- Roseburg’s surplus of Low-Density Residential capacity (1,020 dwelling units) means that the City has an approximate surplus of 352 gross acres of Low Residential land (at 2.9 dwelling units per gross acre).
- Roseburg’s surplus of Medium-Density Residential capacity (43 dwelling units) means that the City has an approximate surplus of 11 gross acres of Medium Density Residential land (at 3.9 dwelling units per gross acre).
- Roseburg has a surplus of 3 acres for High-Density Residential capacity, but when land for group quarters (Exhibit 73) is added in, this decreases to a deficit of 24 gross acres of land.

⁵⁶ Basis for density assumption is the historical net density for multifamily housing in Roseburg’s high-density residential areas historically (2007 through 2018), converted into gross acres using empirical evidence.

Exhibit 74. Final comparison of capacity of existing residential land with demand for new dwelling units and land surplus or deficit, Roseburg UGB, 2019 to 2039

Source: Calculations by ECONorthwest.

Plan Designation	Capacity (Dwelling Units)	Demand (Dwelling Units)	Remaining Capacity (Dwelling Units)	Land Surplus or (Deficit) Gross Acres
Low Density Residential	2,567	1,547	1,020	352
Medium Density Residential	604	561	43	11
High Density Residential	578	550	28	3
Group Quarters in High Density Residential				(24)

Roseburg’s total surplus of capacity shows that the City has an approximate surplus of 352 gross acres in Low Density and 11 gross acres in Medium Density, with a deficit of 24 acres of land in High Density. In addition, Roseburg has redevelopment potential. The City will need to evaluate and identify potential for redevelopment. The following summary may inform that evaluation:

- Roseburg has a surplus residential land for single-family housing. We expect most new development to locate on vacant land (although, all would not be unlikely). But Roseburg has a deficit of land for High Density residential land and a tight supply of land for Medium Density residential.
- Roseburg has 138 acres of land (in high density and medium density residential areas) that has low improvement to land value ratios (Exhibit 11), where there is single-family development. Much of this land is likely lower in value with lower cost housing, increasing the potential for redevelopment to occur. However, given the city's affordability issues, retaining that housing stock is important to meeting the spirit of Goal 10.
- Redevelopment of Medium and High Density lands with single-family detached housing may be unlikely over the next 20 years, given the fact that redevelopment is both more costly than development of vacant land and more difficult because redevelopment typically involves coordination with multiple land owners and potential displacement of residents from comparatively affordable housing. In addition, it is likely that redevelopment would not be financially feasible in Roseburg based on the relatively low achievable rents.
- The City may want to pursue strategies to encourage redevelopment in specific target areas (such as areas close to downtown or along major corridors or transit lines). Doing so would address the deficit of capacity in High Density and increase opportunities for development in Medium Density Residential.
- Without external investment, we expect the private sector will pursue very little redevelopment.

Conclusions

The key findings of the Roseburg Housing Needs Analysis are that:

- **Roseburg’s population is forecasted to grow at a slower rate than in the past.** Roseburg UGB is forecasted to grow from 30,256 people in 2019 to 35,771 people in 2039, an increase of 5,515 people. This population growth will occur at an average annual growth rate of 0.84%.
- **Roseburg is planning for 2,678 new dwelling units.** The growth of 5,515 people will result in demand for 2,678 new dwelling units over the 20-year planning period, averaging 134 new dwelling units annually.
- **Roseburg will plan for more single-family attached and multifamily dwelling units in the future to meet the City’s housing needs.** Historically, about 70% of Roseburg’s housing was single-family detached. While 60% of new housing in Roseburg is forecast to be single-family detached, the City will need to provide opportunities for development of new single-family attached (10% of new housing) and multifamily units (30% of new housing).
 - The factors driving the shift in types of housing needed in Roseburg include changes in demographics and decreases in housing affordability. The aging of the Baby Boomers, and trend to smaller household sizes on average, will drive demand for renter- and owner-occupied housing, such as small single-family detached housing, townhouses, duplexes, and apartments.
 - The aging of the Baby Boomers is likely to result in growth in single-person households, which have substantially lower income than two-person households in Roseburg. These households will need affordable, smaller-scale housing to meet their needs.
 - Roseburg’s existing deficit of housing affordable for low- and high-income households indicates a need for a wider range of housing types, especially for renters. About 35% of Roseburg’s households are cost burdened, including a cost burden rate of 55% for renter households.
 - Without diversification of housing types, housing affordability issues will continue to be a problem, possibly growing in the future if incomes continue to grow at a slower rate than housing costs. Under the current conditions, 869 of the forecasted new households will have incomes at or below 50% of Median Family Income (\$26,050 or less). These households cannot often afford market rate housing without government subsidy. More than 878 new households will have incomes between \$26,050 and \$62,520. These households will also need access to affordable and relatively affordable housing.
- **Roseburg has a deficit of land for High Density Residential.** This deficit can be addressed in several ways: redesignating land from Low or Medium Density Residential

to High Density Residential, increasing the densities allowed and achievable in High Density Residential, providing other opportunities for development of multifamily housing in Commercial or other mixed use zones, or all of these options.

- **Roseburg’s development occurred at relatively low densities since 2000.** The densities of housing developed in Roseburg for the 2000 to 2018 period are relatively low. The Low Density Residential (3.7 dwelling units per net acre or 2.9 dwelling units per gross acre) is a bit lower than but comparable to low density development in other rural cities. Some of the low density can be explained by the fact that much of Roseburg’s vacant Low Density land is on slopes that are decreasing achievable densities.

The densities in Medium Density (5.1 dwelling units per net acre or 3.9 dwelling units per gross acre) and High Density (11.1 dwelling units per net acre or 9.0 dwelling units per gross acre) are below what is typically seen in rural cities. For example, the OAR 660-038 (which provides assumptions for cities to use when developing an urban growth boundary expansion analysis) recommends that cities over 25,000 people assume that Medium Density development will occur at an average of 12 to 15 dwelling units per net acre and the High Density development will occur at an average of 20 to 33 dwelling units per net acre.

- **Roseburg’s Low Density Residential land base has constraints to development.** More than one-quarter of Roseburg’s vacant land in Low Density Residential is partially vacant (247 of 885 acres). In addition, two-thirds of Roseburg’s vacant and partially vacant buildable land in Low Density Residential is on slopes of 12% to 24.9% (568 or 885 acres). Development of partially vacant land can be challenging for a number of reasons, including that it occurs when landowners are ready to subdivide and in cases where partially vacant land is on a relatively small lot (i.e., a lot smaller than five or ten acres), the amount of residential development that can occur is relatively small (and generally more expensive to build). Development on land with moderate slopes is also often more expensive because it generally occurs as lower densities (fewer dwelling units per acre) and on land without urban infrastructure where it may be more expensive to serve because of requirements for road construction or requirements for special equipment (such as pump stations). Developing new housing in these areas may be more expensive, providing fewer opportunities for development of market-rate affordable housing affordable to middle-income households. The Housing Strategy describes actions that the City can take to overcome these barriers, such as allowing a wider range of single-family housing development (such as cottage clusters), implementing a land swap of sloped land within the UGB for flat land outside of the UGB, increasing allowable densities (or setting minimum densities) and removing other barriers to development.
- **Roseburg’s mixed-use zone is industrial.** While Roseburg allows housing in some conditions in commercial zones, the City’s mixed-use zone is a mixture of industrial and

residential development. This combination can lead to a conflict of uses between industrial and housing, which may discourage development of mixed use housing.

- **Roseburg should take actions to address substandard housing.** Lack of redevelopment, slow new house development, and financial barriers have impacted the quality of housing in Roseburg. Roseburg can help address housing quality concerns in a number of ways: (1) by identifying and maintaining a database of blighted homes, (2) by supporting rehabilitation with financial incentives, and (3) by working with developers and housing providers to alleviate zoning barriers to rehabilitation.
- **Roseburg should take actions to address homelessness.** As of 2019, 204 households experienced homelessness in Roseburg. Most (74%) households experiencing homelessness have at least one household member with a disabling condition. Roseburg can address homelessness by providing opportunities to increase the supply of government-assisted affordable housing.

The **Housing Policies and Actions Memorandum** provides recommendations for policies to these and other issues identified in the Housing Needs Analysis.

Appendix A – Residential Buildable Lands Inventory

The general structure of the buildable land (supply) analysis is based on the DLCD HB 2709 workbook “*Planning for Residential Growth – A Workbook for Oregon’s Urban Areas*,” which specifically addresses residential lands. The buildable lands inventory uses methods and definitions that are consistent with Goal 10/OAR 660-008. This appendix describes the methodology that ECONorthwest used for this report, based on 2018 data. The results of the BLI are discussed in Chapter 2.

Overview of the Methodology

Following are the statutes and administrative rules that provide guidance on residential BLIs:

OAR 660-008-0005(2):

“Buildable Land” means residentially designated land within the urban growth boundary, including both vacant and developed land likely to be redeveloped, that is suitable, available and necessary for residential uses. Publicly owned land is generally not considered available for residential uses. Land is generally considered “suitable and available” unless it:

- (a) Is severely constrained by natural hazards as determined under Statewide Planning Goal 7;*
- (b) Is subject to natural resource protection measures determined under Statewide Planning Goals 5, 6, 15, 16, 17 or 18;*
- (c) Has slopes of 25 percent or greater;*
- (d) Is within the 100-year flood plain; or*
- (e) Cannot be provided with public facilities.*

Inventory Steps

The BLI consists of several steps:

1. Generate UGB “land base”
2. Classify land by development status
3. Identify constraints
4. Verify inventory results
5. Tabulate and map results

Step 1: Generate “land base.”

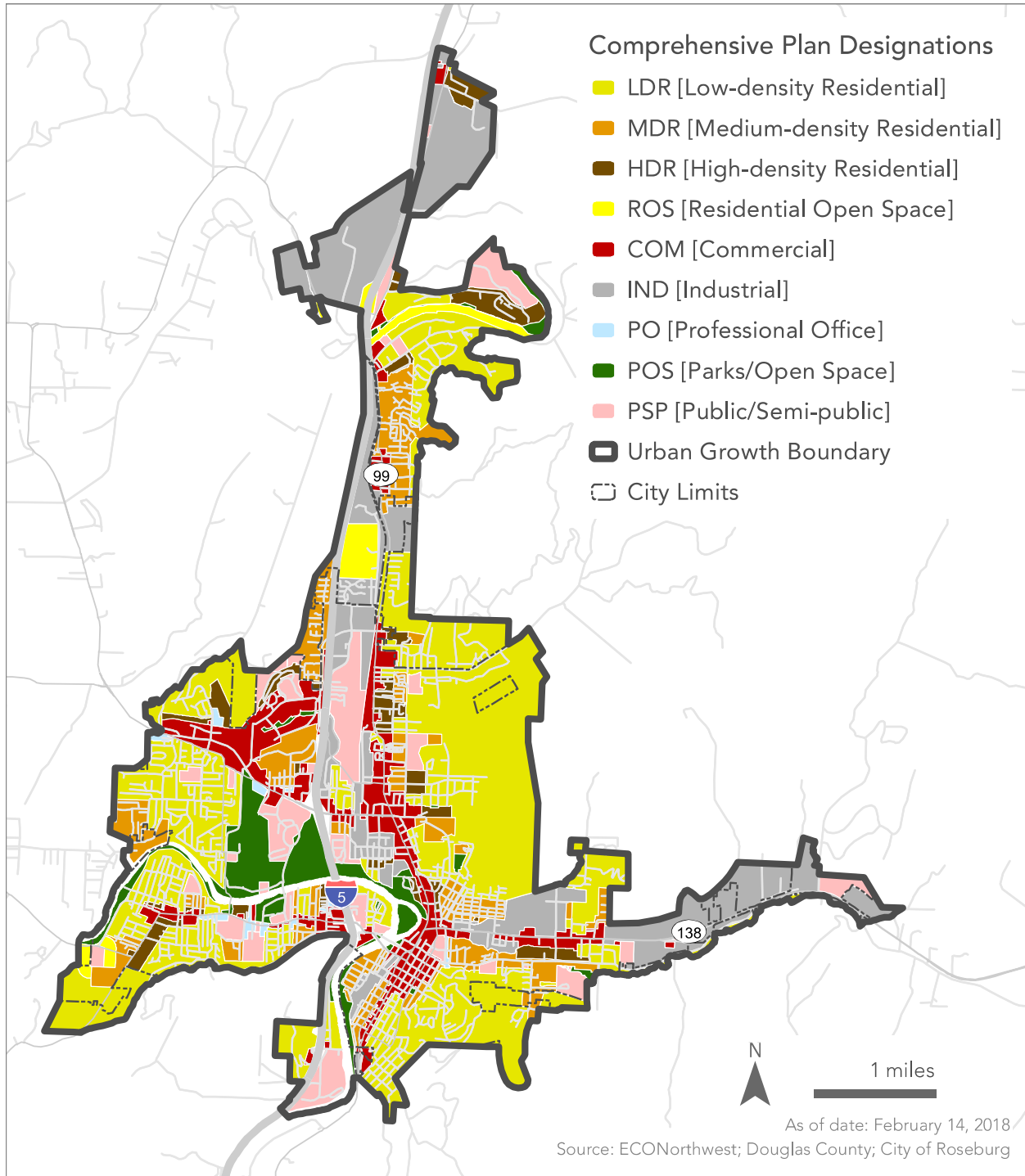
Per Goal 10 this involves selecting all of the tax lots in the Roseburg UGB with residential and other non-employment plan designations. Plan designations included in the residential inventory include:

- Low Density Residential
- Medium Density Residential
- High Density Residential
- Residential Open Space
- Commercial
- Industrial (mixed use zone where residential is allowed)

Exhibit 75 shows the residential plan designations included in the BLI.

Roseburg Buildable Lands Inventory

Comprehensive Plan Designations



Step 2: Classify lands.

In this step, ECONorthwest classified each tax lot with a plan designation that allows residential uses into one of five mutually exclusive categories based on development status:

- Developed land
- Vacant land
- Partially vacant land
- Undevelopable land
- Public or exempt land

ECONorthwest initially identified buildable land and classified development status using a rule-based methodology consistent with the DLCD Residential Lands Workbook and applicable administrative rules. The rules are described below in Exhibit 76.

Exhibit 76. Rules for Development Status Classification

Development Status	Definition	Statutory Authority
Vacant Land	Tax lots that have no structures or have buildings with very little improvement value. For the purpose of this inventory, lands with improvement values of less \$10,000 were considered vacant (not including lands that are identified as having mobile homes).	OAR 660-008-0006(2) (2) “Buildable Land” means residentially designated land within the urban growth boundary, including both vacant and developed land likely to be redeveloped, that is suitable, available and necessary for residential uses. Publicly owned land is generally not considered available for residential uses.
Partially Vacant Land	Partially vacant tax lots can use safe harbor established in State statute: <i>The infill potential of developed residential lots or parcels of one-half acre or more may be determined by subtracting one-quarter acre (10,890 square feet) for the existing dwelling and assuming that the remainder is buildable land;</i>	OAR 660-024-0050 (2)(a)
Undevelopable Land	Vacant tax lots less than 4,800 square feet in size were considered undevelopable.	No statutory definition

Development Status	Definition	Statutory Authority
Public or Exempt Land	Lands in public or semi-public ownership are considered unavailable for residential development. This includes lands in Federal, State, County, or City ownership as well as lands owned by churches and other semi-public organizations and properties with conservation easements. Public lands were identified using the Assessor's property tax exemption codes.	OAR 660-008-0005(2) - Publicly owned land is generally not considered available for residential uses.
Developed Land	Land that is developed at densities consistent with zoning and improvements that make it unlikely to redevelop during the analysis period. Lands not classified as vacant, partially-vacant, undevelopable or public or exempt are considered developed.	No statutory definition

Step 3: Identify constraints

Consistent with OAR 660-008-0005(2) guidance on residential buildable lands inventories, ECO deducted certain lands with development constraints from the BLI. We used the following constraints, as listed in Exhibit 77.

Exhibit 77. Constraints to be included in BLI

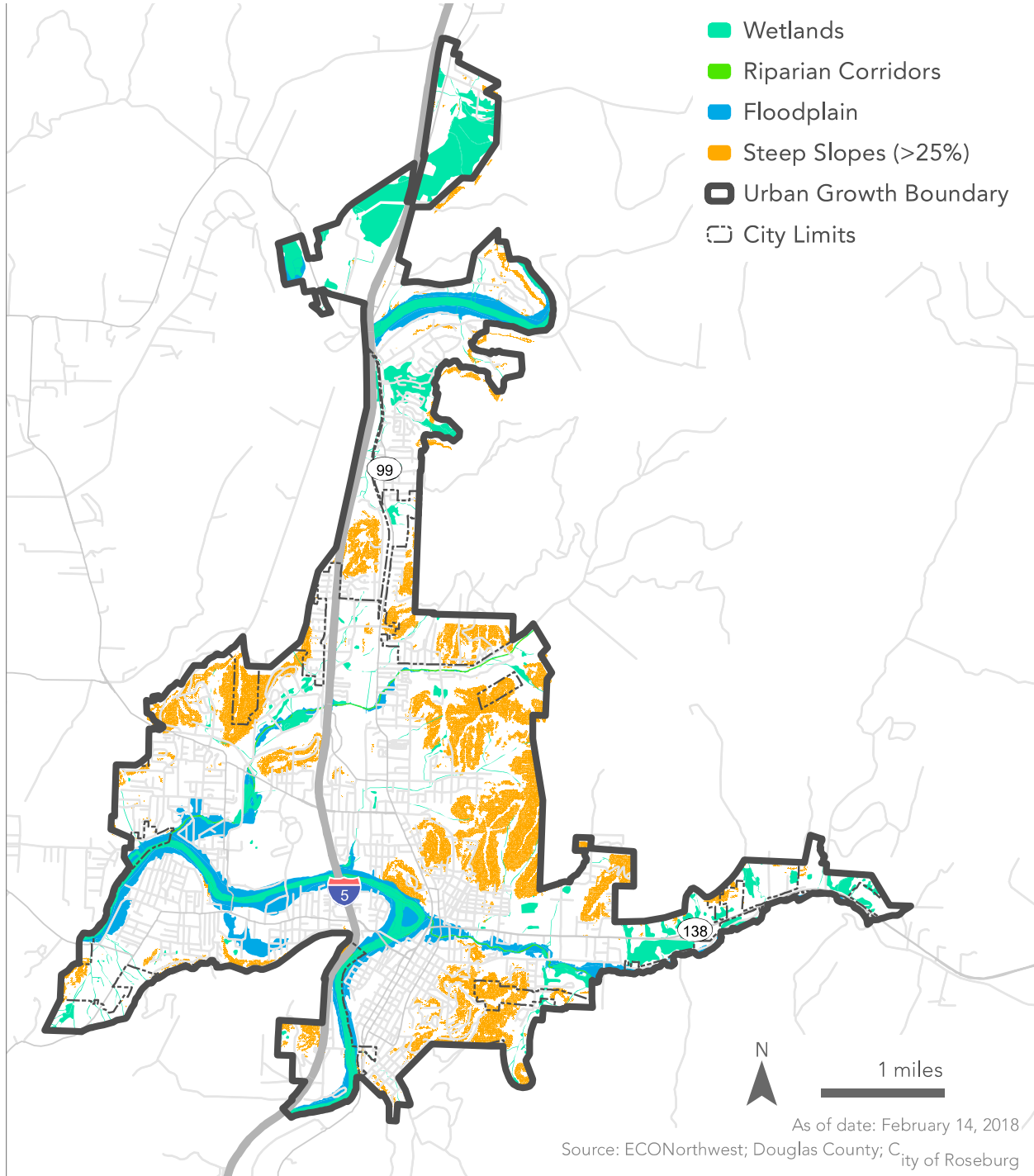
Constraint	Statutory Authority	Threshold	File name
Goal 5 Natural Resource Constraints			
Regulated Wetlands	OAR 660-008-0005(2)	Wetlands	Wetlands.shp
Riparian Corridors	OAR 660-015-0000(5)	25-50 foot buffer	Riparian_Habitat_Protection_Overlay.shp
Natural Hazard Constraints			
Floodways	OAR 660-008-0005(2)	Lands within FEMA FIRM identified floodway	FEMA_100_Year_Flood_Plain.shp
100 Year Floodplain	OAR 660-008-0005(2)	Lands within FEMA FIRM 100-year floodplain	FEMA_100_Year_Flood_Plain.shp
Steep Slopes	OAR 660-008-0005(2)	Slope greater than 25%	Slope_greater_than_25%.shp

We treated these areas as prohibitive constraints (unbuildable) as shown in Exhibit 78. All constraints were merged into a single constraint file, which was then used to identify the area of each tax lot that is constrained. These areas were deducted from lands that are identified as vacant or partially vacant.

Lack of access to water, sewer, power, road or other key infrastructure cannot be considered a prohibitive constraint unless it is an extreme condition. This is because tax lots that are currently unserviced could potentially become serviced over the 20-year planning period.

Roseburg Buildable Lands Inventory

Residential Constraints



Step 4: Verification

ECO used a multi-step verification process. The first verification step involved a “rapid visual assessment” of land classifications using GIS and recent aerial photos. The rapid visual assessment involves reviewing classifications overlaid on recent aerial photographs to verify uses on the ground. ECO reviewed all tax lots included in the inventory using the rapid visual assessment methodology. The second round of verification involved City staff verifying the rapid visual assessment output. ECO amended the BLI based on City staff review and a discussion of the City’s comments.

Step 5: Tabulation and mapping

The results are presented in tabular and map format. We included a comprehensive plan map, the land base with constraints, the land base by plan designation, and vacant and partially vacant lands by plan designation with constraints showing.

Appendix B: Roseburg Homeless Population Study: Summary Report

The *Roseburg Homeless Population Study: Summary Report* by Kristina Smock Consulting, April 2018, is a separate deliverable, but a related product.