Wilsonville Residential Land Study: Technical Report

May 2014

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Chapter 1. Introduction

This report is part of the Wilsonville Residential Land Study. The full study is contained in two documents:

- **Residential Land Study: Summary** briefly presents the key findings and conclusions of the residential land study.

- **Residential Land Study: Technical Report** presents the full results of the housing needs analysis (HNA) for the City of Wilsonville and is intended to comply with statewide planning policies.

This report presents the Technical Report of the Residential Land Study. 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 7. The methods used for this study generally follow the *Planning for Residential Growth* guidebook, published by the Oregon Transportation and Growth Management Program (1996).

This report provides Wilsonville with a factual basis to support future planning efforts related to housing and options for addressing unmet housing needs in Wilsonville. It provides information that informs future planning efforts such as the Frog Pond and Advance Road Concept Plan, but it is not intended to be prescriptive about how Wilsonville meets housing needs. The report is a background document that supports the Wilsonville Comprehensive Land Use Plan. It provides the City with information about the housing market in Wilsonville and describes the factors that will affect housing demand in Wilsonville in the future, such as changing demographics and potential changes to commuting patterns.

In addition, Wilsonville entered Periodic Review in 1996. This report meets the Goal 10 requirements of Wilsonville's Periodic Review work plan and presents a housing needs analysis that projects Wilsonville's housing needs over the 2014 to 2034 period.

BACKGROUND

Through this project, the City wants to complete the outstanding Periodic Review requirement to complete an HNA, while complying with the requirements of Goal 10, OAR 660 Divisions 7, and the Metro Urban Growth Management Functional Plan. However, this project is about more than complying with State and Metro requirements to identify housing needs. This project will provide the basis for planning and policies that support the next generation of residential growth in Wilsonville.

Wilsonville has a history of pro-active planning to accommodate residential development. Wilsonville's Planning and Land Development Ordinance is structured and implemented differently than the codes of most other cities. When Wilsonville incorporated in the 1960's, much of the land in the City was greenfields.

Wilsonville's development code was designed to allow for continuation of existing uses until land is developed. Much of Wilsonville's vacant residential land is zoned RA-H Residential Agricultural Holding (RA-H) zone, which allows land within the city to continue to be used as agricultural or rural residential until the time when the land is ripe for the type and scale of development designated in the Comprehensive Plan.

In addition, Wilsonville has a substantial amount of development-ready land that is in planned development (PD) zones. Development of land in these zones requires development of a preliminary and final master plan and site design review. Through this process, the City is able to ensure that residential development happens through a deliberate, thoughtful process to address the City's residential and livability goals. Wilsonville has three approved residential master plans for residential development that have not yet been fully implemented. These are the plans for Villebois, Brenchley Estates, and Town Center (which is primarily commercial but allows some residential development).

The purpose of the technical report of Residential Land Study is to develop a factual basis for Wilsonville to continue proactive planning to accommodate expected residential growth. The housing needs analysis focuses on planning over a 20-year period, using Metro's forecasts of expected housing growth.

Beyond the core purposes of determining whether Wilsonville has enough residential land to accommodate forecast growth and compliance with State policy, the Residential Land Study is intended to inform:

- Strategies to implement local housing priorities

- The Frog Pond concept planning process

- Updates to the Housing Element of the Wilsonville Comprehensive Plan

- Code amendments to better implement the local housing strategy

ORGANIZATION OF THIS REPORT

This document is the technical report that accompanies the Residential Land Study summary report. The rest of this document is organized as follows:

- **Chapter 2. Framework for a Housing Needs Analysis** describes the theoretical and policy underpinnings of conducting a Goal 10 housing needs analysis for Wilsonville, including requirements outlined in the Metropolitan Housing Rule (OAR 660-007).

- **Chapter 3. Historical and Recent Development Trends** summarizes the state, regional, and local housing market trends affecting Wilsonville's housing market.

- **Chapter 4. Demographic and Other Factors Affecting Residential Development in Wilsonville** discusses the factors that affect housing need in Wilsonville, focusing on the key determinants of housing need: age, income, and household composition. This chapter also describes housing affordability in Wilsonville relative to the larger region.

- **Chapter 5. Housing Need in Wilsonville** forecasts housing need in Wilsonville for the 20-year period between 2014 and 2034 based on Metro's forecast for household growth.

- **Chapter 6 Residential Land Sufficiency within Wilsonville** estimates the Wilsonville UGB's residential land sufficiency needed to accommodate expected growth over the planning period.

- **Appendix A. Summary of Residential Buildable Lands Inventory**

Chapter 2.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 by both 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 the Portland Region, Clackamas and Washington Counties and Wilsonville are the result of the individual decisions of hundreds of thousands of households. These points help to underscore the complexity of projecting what types of housing will be built in Wilsonville between 2014 and 2034.

The complex nature of the housing market was demonstrated by the unprecedented boom and bust during the past decade. This complexity does not eliminate the need for some type of forecast of future housing demand and need, with the 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.

SUMMARY

Goal 10 requires the City to plan for "needed" housing types, which are housing types determined to meet the need shown for housing within an urban growth boundary at particular price ranges and rent levels. Needed housing also includes (but is not limited to) attached and detached single-family housing, multiple-family housing, and manufactured homes, whether

occupied by owners or renters. In short, Wilsonville must plan for a range of housing types at a range of price levels.

Goal 10 intends that cities identify housing needs and develop a land use policy framework that meets identified needs. One of the key issues that is addressed in a housing needs analysis is to determine how much land is needed for different housing types, and therefore must be designated for those needs. Providing sufficient land in the proper designations is one of the most fundamental land use tools local governments have to meet housing need.

The *2012 Compliance Report* by Metro[1] found Wilsonville to be in compliance with the City's responsibilities for Title 1, Title 7, and Title 11.

OREGON HOUSING POLICY

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] Jurisdictions located in the Metro UGB are also required to comply with Metropolitan Housing in OAR 660-007 and Title 7 of Metro's Urban Growth Management Functional Plan in the Metro Code (3.07 Title 7).

Goal 10 requires incorporated cities to complete an inventory of buildable residential lands and to encourage the availability of adequate numbers of housing units in price and rent ranges commensurate with the financial capabilities of its households.

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[1] 2012 Compliance Report. Metro Code Chapter 3.07 Urban Growth Management Functional Plan and Metro Code Chapter 3.08 Regional Transportation Functional Plan. March 2013. Available at: www.oregonmetro.gov.

[2] ORS 197.296 only applies to cities with populations over 25,000.

Goal 10 defines needed housing types as "housing types determined to meet the need shown for housing within an urban growth boundary at particular price ranges and rent levels." ORS 197.303 defines needed housing types:

(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; and

(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.

In summary, Wilsonville 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.

The Metropolitan Housing Rule

OAR 660-007 (the Metropolitan Housing rule) is designed to "assure opportunity for the provision of adequate numbers of needed housing units and the efficient use of land within the Metropolitan Portland (Metro) urban growth boundary." OAR 660-0070-005(12) provides a Metro-specific definition of needed housing:

> "Needed Housing" defined. Until the beginning of the first periodic review of a local government's acknowledged comprehensive plan, "needed housing" means housing types determined to meet the need shown for housing within an urban growth boundary at particular price ranges and rent levels.

The Metropolitan Housing Rule also requires cities to develop residential plan designations:

> (1) Plan designations that allow or require residential uses shall be assigned to all buildable land. Such designations may allow nonresidential uses as well as residential uses. Such designations may be considered to be "residential plan designations" for the

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

purposes of this division. The plan designations assigned to buildable land shall be specific so as to accommodate the varying housing types and densities identified in OAR 660-007-0030 through 660-007-0037.

OAR 660-007 also specifies the mix and density of new residential construction for cities within the Metro UGB:

"Provide the opportunity for at least 50 percent of new residential units to be attached single family housing or multiple family housing or justify an alternative percentage based on changing circumstances." (OAR 660-007-0030 (1))

OAR 660-007-0035 sets specific density targets for cities in the Metro UGB. Wilsonville's density target is eight dwelling units per net buildable acre.[4]

Metro Urban Growth Management Functional Plan

The Metro Urban Growth Management Functional Plan describes the policies that guide development for cities within the Metro UGB to implement the goals in the Metro 2040 Plan.

Title 1: Housing Capacity

Title 1 of Metro's Urban Growth Management Functional Plan is intended to promote efficient land use within the Metro UGB by increasing the capacity to accommodate housing capacity. Each city is required to determine its housing capacity based on the minimum number of dwelling units allowed in each zoning district that allows residential development, and maintain this capacity.

Title 1 requires that a city adopt minimum residential development density standards by March 2011. If the jurisdiction did not adopt a minimum density by March 2011, the jurisdiction must adopt a minimum density that is at least 80% of the maximum density. Wilsonville has met this requirement.

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[4] OAR 660-024-0010(6) defines Net Buildable Acres as follows: "Net Buildable Acre" consists of 43,560 square feet of residentially designated buildable land after excluding future rights-of-way for streets and roads.

This report uses a definition of "net acre" that is consistent with the definition in OAR 660-024. A net acre is defined as including the parcel upon which residential dwellings are constructed, including any open space provided on that parcel. Net acreage does not include public or private rights of way, city or homeowners association (e.g., public or privately owned) parkland, homeowners association-owned common tracts in the net area, or land with constraints that prohibit development (e.g., land in a Significant Resource Overlay Zone (SROZ) in Wilsonville).

Title 1 provides measures to decrease development capacity in selected areas by transferring the capacity to other areas of the community. This may be approved as long as the community's overall capacity is not reduced.

Metro's *2012 Compliance Report* concludes that Wilsonville is in compliance for the City's Title 1 responsibilities.

Title 7: Housing Choice

Title 7 of Metro's Urban Growth Management Functional Plan is designed to ensure the production of affordable housing in the Metro UGB. Each city and county within the Metro region is encouraged to voluntarily adopt an affordable housing production goal.

Each jurisdiction within the Metro region is required to ensure that their comprehensive plans and implementing ordinances include strategies to: ensure the production of a diverse range of housing types, maintain the existing supply of affordable housing, increase opportunities for new affordable housing dispersed throughout their boundaries, and increase opportunities for households of all income levels to live in affordable housing. (3.07.730).

Metro's *2012 Compliance Report* concludes that Wilsonville is in compliance for the City's Title 7 responsibilities.

Title 11: Planning for New Urban Areas

Title 11 of Metro's Urban Growth Management Functional Plan provides guidance on the conversion of land from rural to urban uses. Land brought into the Metro UGB is subject to the provisions of section 3.07.1130 of the Metro Code which requires lands to be maintained at rural densities until the completion of a concept plan and annexation into the municipal boundary.

The concept plan requirements directly related to residential development are to prepare a plan that includes: (1) a mix and intensity of uses that make efficient use of public systems and facilities, (2) a range of housing for different types, tenure, and prices that addresses the housing needs of the governing city, and (3) identify goals and strategies to meet the housing needs for the governing city in the expansion area.

Metro's *2012 Compliance Report* concludes that Wilsonville's deadline to comply with Title 11 for the Frog Pond urban growth area is December 31, 2015.

WILSONVILLE HOUSING POLICY

Wilsonville has a unique and flexible system of planning for, and permitting, residential development. Since Wilsonville's Comprehensive Plan was initially acknowledged in 1980, Wilsonville has planned for growth of an industrial base surrounded by quality residential areas that feature a mix of single and multi-family development, with an emphasis on open space and the natural environment. That strategy is reflected in Policy 4.1.4 of the Wilsonville Comprehensive Plan:

"The City of Wilsonville shall provide opportunities for a wide range of housing types, sizes, and densities at prices and rent levels to accommodate people who are employed in Wilsonville." This commitment to providing a range of housing opportunities is reinforced in Implementation Measure 4.1.4d (and other measures) of the Wilsonville Comprehensive plan:

> "Encourage the construction and development of diverse housing types, but maintain a general balance according to housing type and geographic distribution, both presently and in the future. Such housing types may include, but shall not be limited to: Apartments, single-family detached, single-family common wall, manufactured homes, mobile homes, modular homes, and condominiums in various structural forms."

In sum, providing a mix of housing types and densities to create a whole community was envisioned in the original Comprehensive Plan map and text—a vision that the City has consistently implemented. According to the Wilsonville Comprehensive Plan, as of October 1999, the existing housing stock of 6,788 units consisted of 41.2% single-family 52.4% multi-family (including duplexes and condominiums), and 6.4% manufactured housing (mobile homes). This mix of housing types indicates that the City met the intent of the State's "Metro Housing Rule" applying to housing mix. It is notable that Wilsonville had a high percentage of multifamily housing in 1999, a trend that continued through 2013.

It is also important to note that the total number of housing units within the city increased by more than 45% in thirteen years. During that period, there were 476 more multiple-family units than single-family units added to Wilsonville's housing mix.

In short, land within the city that was planned for Residential use was allocated a minimum and maximum density per acre, and these planned densities have generally not changed since 1980. Moreover, plan policies and implementation measures emphasize inclusion of all housing types, and provision of housing for people who work in Wilsonville.

One of the core elements of Wilsonville's approach is master planning. Villebois Village is the largest master-planned neighborhood in Wilsonville, planned to include 2,300 housing units. The Villebois Concept Plan and subsequent Master Plan established a vision for an "urban village" surrounding a mixed-use urban center. Each of the neighborhoods within the village include a mix of housing types, and the Village Center was planned for higher-density and mixed use development.

To summarize, Wilsonville has long had a strong vision to provide a mix of housing types that meet the financial capacity of the community. That commitment is reflected in the City's comprehensive plan and implementing ordinances and played a big role in the residential development pattern seen in Wilsonville in 2013.

Chapter 3. Historical and Recent Development Trends

Analysis of historical development trends in Wilsonville provides insights into how the local housing market functions. The housing type mix and density are also key variables in forecasting future land need. The specific steps are described in Task 2 of the DLCD *Planning for Residential Lands* Workbook:

1. Determine the time period for which the data must be gathered

2. Identify types of housing to address

3. Evaluate permit/subdivision data to calculate the actual mix, average actual gross density, and average actual net density of all housing types

This chapter presents information regarding Wilsonville's housing stock and recent development trends.

SUMMARY OF KEY FINDINGS ABOUT DEVELOPMENT TRENDS

This section summarizes the findings in Chapter 3 about historical and recent development trends in Wilsonville.

Steady population and employment growth, combined with the constraints on buildable lands in the Portland Region, ensure that Wilsonville's housing market will maintain a solid underpinning for a long time to come, despite the recent downturn in the regional and national housing market. In the long run, the Portland Urban Growth Boundary is expected to add nearly 300,000 new households by 2035. If these estimates are correct, this will be enough people to ensure an on-going demand for all types of housing and new neighborhoods.

The trends summarized below describe recent and historical residential development activity in Wilsonville. This chapter provides information to describe Wilsonville's role in the Portland Region's housing market.

Residential development trends over the 2000 to 2012 period

- **Wilsonville is growing.** Wilsonville issued permits for nearly 2,900 new dwelling units between 2000 and 2012. Four percent of permits issued in the largest cities in the Portland UGB (shown in Table 3-2) were issued by Wilsonville. In comparison, Wilsonville accounted for 1.2% of the population in the Portland Region in 2012. The large number of permits issued in Wilsonville shows that the City is growing comparatively quickly, relative to similar sized and larger cities in the Region.

- **Wilsonville added both single-family and multifamily housing over the 2000 to 2012 period.** The City has had a relatively steady stream of single-family housing construction, with the addition of 13 multifamily projects with 10 or more units, resulting in in the addition of about 1,800 new multifamily units (95% of all new multifamily units). New dwellings have been developed in all parts of the City.

- **Wilsonville's mix of housing provides a range of needed housing types.** Development in Wilsonville since 2000 included housing that is affordable to a range of households, including government-subsidized affordable housing, market-rate workforce housing, high-amenity multifamily rental housing, and a range of types of owner-occupied single-family housing.

- **Development of Villebois contributed substantially to Wilsonville's growth.** Nearly 900, or 31%, of new dwelling units developed in Wilsonville from 2000 to 2012 were in Villebois, accounting for 53% of new single-family units and 20% of new multifamily units.

- **Wilsonville is achieving the vision in its Comprehensive Plan.** Wilsonville's Comprehensive Plan envisions providing a variety of housing options for residents of Wilsonville in a range of housing densities, sizes, and costs.

Trends in the mix of Wilsonville's entire housing stock

- **Wilsonville has a high percentage of multifamily housing (as a percent of total housing stock) relative to other municipalities in the region.** About 43% of Wilsonville's overall housing stock housing was in single family housing types in 2012.

- **Wilsonville has a variety of types of multifamily housing.** The types of multifamily housing in Wilsonville include apartments, single-family attached dwellings, condominiums, and duplexes. In addition, Wilsonville has a substantial amount of housing for seniors, such as

assisted living facilities. While the majority of Wilsonville's multifamily housing is market-rate housing, Wilsonville has nearly 500 units of government-subsidized affordable housing for low-income seniors, families, people with disabilities, and other low-income households. In addition Wilsonville.

Trends in homeownership

- **Homeownership rates in Wilsonville are lower than the regional average.** In 2010, 46% of Wilsonville homes were owner-occupied, compared with 60% of Portland Region homes. Homeownership rates in other cities in the Portland Region varied from 50% in Beaverton to 60% in Tigard to 88% homeownership rates in Happy Valley.

- **Homeownership in Wilsonville decreased between 2000 and 2010.** The homeownership rate decreased from 54% in 2000 to 45% in 2010. Some of this decrease can be attributed to the national and statewide decreases in homeownership rates.

- **Homeownership rates vary widely between housing types,** with single-family housing types having much higher homeownership rates than multifamily types. In Wilsonville in 2007-2011, 88% of single-family detached housing was owner-occupied, which is slightly higher than is typical for cities the size of Wilsonville. About 3% of housing in buildings with five or more units was owner-occupied, which is typical for a city the size of Wilsonville.

Residential development density over the 2000 to 2012 period

- **Wilsonville's average development density is higher than the minimum density required by OAR 660-007.** Between 2000 and 2012, Wilsonville's average residential development density was 12.4 dwellings per net acre.[5] OAR 660-007 requires that Wilsonville designate land to allow the opportunity for housing development with

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[5] OAR 660-024-0010(6) defines Net Buildable Acres as follows: "Net Buildable Acre" consists of 43,560 square feet of residentially designated buildable land after excluding future rights-of-way for streets and roads.

This report uses a definition of "net acre" that is consistent with the definition in OAR 660-024. A net acre is defined as including the parcel upon which residential dwellings are constructed, including any open space provided on that parcel. Net acreage does not include public or private rights of way, city or homeowners association park land, homeowners association-owned common tracts in the net area, or land with constraints that significantly constrains development (e.g., land in a Significant Resource Overlay Zone (SROZ) in Wilsonville).

a minimum density of 8 dwelling units per net acre for new development. Between 2000 and 2012, Wilsonville exceeded this target.

- **Wilsonville's average density was high, in part, because two-thirds of development was multifamily.** Over the 2000 to 2012 period, the City's average multifamily development density was 18.5 dwelling units per net acre.

- **Wilsonville's single-family density is relatively high.** Over the 2000 to 2012 period, the City's average single-family density was 7.6 dwelling units per net acre, which is close to the average minimum density that Wilsonville is required to plan for by OAR 660-007.

Vacancy rates

- **Wilsonville's vacancy rate has been similar to or lower than other urban areas within the Portland Region.** Since the Spring of 2010, Wilsonville's vacancy rates have generally been below 4%, which is comparable to or less than most of the larger cities in the southern portion of the Portland Region. In Spring 2013, Wilsonville's vacancy rate was 3.8%, compared to the Portland/Vancouver Metro average of 3.6%.

METHODS USED IN THE ANALYSIS

To better understand the dynamics of local housing markets, housing studies commonly include an analysis of housing mix and density. Wilsonville has not completed periodic review since developing its Comprehensive Plan in 1980. The period used in the analysis of housing density and mix is 2000 to 2012 for the following reasons:

- Wilsonville's building permit data is available in a database that tracks information since 2005. Data prior to 2005, building permit data is only available on a permit-by-permit basis, from paper records. Compiling an accurate, complete historical database of residential development from 1980 to 1999 would be time consuming for City staff.

  The City also has a database of dwelling units by year that dates back to 1980 and describes the mix of dwelling unit types in Wilsonville. To ensure accuracy for this study, the City checked building permit data against the database of dwelling units.

- In addition, the City changed development policies in 2000, with substantial revisions to its zoning code. Among other changes, this revision included the addition of density requirements in planned unit development areas, which include the majority of vacant residential

land in Wilsonville. Even if staff were able to develop an accurate database of development between 1980 and 1999, this development occurred under outdated development policies and is not reflective of current residential development policies.

The housing needs analysis presents information about residential development by housing types. There are multiple ways that housing types could be grouped. For example, housing types could 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., units affordable at given income levels)
(4) Some combination of these categories

For the purposes of this study, ECONorthwest 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:

- **Single-family detached** includes single-family detached units and manufactured homes on lots and in mobile home parks.

- **Single-family attached** includes townhouses, row houses, and other attached structures that are generally located on an individual tax lots.[6]

- **Multifamily** is all attached structures, ranging from duplexes to tri- and quad-plexes to structures with more than five units. Lower density attached housing (e.g., duplexes or quad-plexes) and higher density attached housing (e.g., multi-story condominium or apartment buildings) are both included in this category because they meet the definition of multifamily housing in OAR 660-007, described below.

This distinction in housing types meet the requirements of OAR 660-007 to "Provide the opportunity for at least 50 percent of new residential units to be attached single family housing or multiple family housing…"

One of the key sources for data about housing and household data is the U.S. Census. This report primarily uses data from two Census sources:

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[6] In some instances, single-family attached is included with single-family detached because the source data does not distinguish between these types of housing. These housing types are most commonly blended in Wilsonville's building permit data. Where these housing types are blended, they are labeled "single-family" (rather than "single-family detached") and the table or figure notes this fact.

- 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 the 2010 Decennial Census, the Census Bureau 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. The 2011 ACS sampled about 3.3 million households in 2011 or about 2.5% of the households in the nation. The ACS collects detailed information about households, such as: 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.

  For cities with a population of fewer than 20,000—which included Wilsonville until 2012—ACS data is only available as a 5-year estimate because the ACS sample is not large enough to give statistically significant results from a one-year sample. The 2007-2011 ACS employs a continuous measurement methodology that uses a monthly sample of the U.S. population. By pooling several years of survey responses, the ACS can generate detailed statistical portraits of small geographies, such as Wilsonville.

  For example, the 2007-2011 ACS shows that Wilsonville's median household income was about $51,000. This estimate of income was generated from households' responses to the ACS in each of the five years of the period (i.e., 2007, 2008, etc.). This median is not an average of medians but the median for all ACS responses collected from Wilsonville households over the five-year period.

In general, this report uses data from the 2007-2011 ACS for Wilsonville. Where information is available, we report information from the 2010 Decennial Census.

NATIONAL HOUSING MARKET TRENDS

The following evaluation of housing trends is based on previous research conducted by ECONorthwest for other housing needs studies as well as new research. This evaluation is based, in part, on conclusions from The State of the Nation's Housing, a 2012 report from the Joint Center for Housing Studies of Harvard University.

> "After several false starts, there is reason to believe that 2012 will mark the beginning of a true housing market recovery. Sustained employment growth remains key, providing the stimulus for stronger household growth and bringing relief to some distressed homeowners. Many rental markets have already turned the corner, giving a lift to multifamily construction but also eroding affordability for many low-income households. While gaining ground, the homeowner market still faces multiple challenges. If the broader economy weakens in the short term, the housing rebound could again stall."

The national housing market continues to suffer from a large backlog of foreclosed homes, large numbers of 'underwater' mortgages, and high vacancy rates. The eventual recovery of the national housing market is dependent on near-term resolution of outstanding foreclosures and long-term job growth and expansion of the economy.

This evaluation presents a mixed outlook for housing markets with some signs of improvement in the jobs sector countered by the difficulty of acquiring new loans and reduced expectations for household growth. Following are some other relevant findings from the 2011 and 2012 Harvard reports:

- The last seven years saw a continuation of the significant departure from the recent housing boom that had lasted for 13 consecutive years (1992-2005). By 2007 and early 2008, housing market problems had reached the rest of the economy, resulting in a nationwide economic slowdown and recession. The slowdown has continued through 2012, although the national housing market shows signs of recovery.

- The on-going recovery from the housing downturn is weaker than any housing cycle since the 1970's. Most notably, housing starts have been below 1 million units per year since 2009, with little of the rebound present after housing troughs seen in other decades.

- The number of delinquent loans or home foreclosures has begun to decrease, although a large number of homes remain in foreclosure proceedings. The number of loans 90 days or more delinquent decreased since its peak in late 2009. The backlog of loans in the

foreclosure process decreased only slightly between late 2009 and 2012.

- Since 2008, foreclosures have contributed to sharp decrease in housing prices, leaving roughly 11.1 million homeowners underwater on their mortgages (where the value of the house is less than the owner's mortgage). These loans equate to $717 billion in negative equity.

- Homeownership peaked at 69.9% in 2005. After 13 successive years of increases, the national homeownership rate slipped each year from 2005 to 2011 and was at 65.4% in the first quarter of 2012. The Joint Center for Housing Studies predicts that the homeownership rate will continue to decline in the near-term due to the foreclosure backlog and tight credit conditions.

- Nationally, the rental market continues to experience growth, adding 1.0 million rental households in 2011 and averaging 730,000 new rental households per year from 2005 through 2011. After an increase in the overall rental vacancy rate from 9.6% in 2007 to 10.6% in 2009, the rental market has begun to tighten. The rental vacancy rate fell to 9.5% in 2011.

REGIONAL AND LOCAL HOUSING MARKET TRENDS

Residential development trends

Wilsonville had a total of 9,100 dwelling units in 2012. Figure 3-1 and Table 3-1 show residential building permits issued in Wilsonville between January 1, 2000 and December 31, 2012. During this period, the City issued permits for a total of 2,862 dwelling units or one-third of Wilsonville's total housing stock. Wilsonville permitted an average of 220 dwelling units annually. More than 400 units were permitted each year in 2006, 2011, and 2012.

The number of single-family units permitted, which includes both single-family detached and attached dwellings, was relatively stable over the 13-year period, averaging 75 units permitted annually. The largest number of single-family permits was issued between 2004 and 2007, consistent with the national housing market boom.

While the number of permits issued decreased substantially in 2009 and 2010, the number of single-family permits issued in 2011 and 2012 rebounded to at or above the period average. The major reason for this was construction of single-family dwellings in Villebois. This rebound suggests that Wilsonville's

housing market was less impacted by the national and regional housing market decline that started in 2008, and Wilsonville's housing market is rebounding relatively quickly.

Two-thirds of units permitted during the 2000-2013 period were multifamily housing, which includes apartments, condominiums, and congregate housing. The number of multifamily dwellings permitted varied from zero in 2000 and 2003 to more than 400 annually in 2006, 2011, and 2012. The large number of units permitted in 2011 and 2012 also suggests that demand for housing in Wilsonville has remained strong, despite the recent national and regional housing market decline.

Figure 3-1. Dwelling units approved through building permits issued for new residential construction, Wilsonville, January 1, 2000 to December 31, 2012
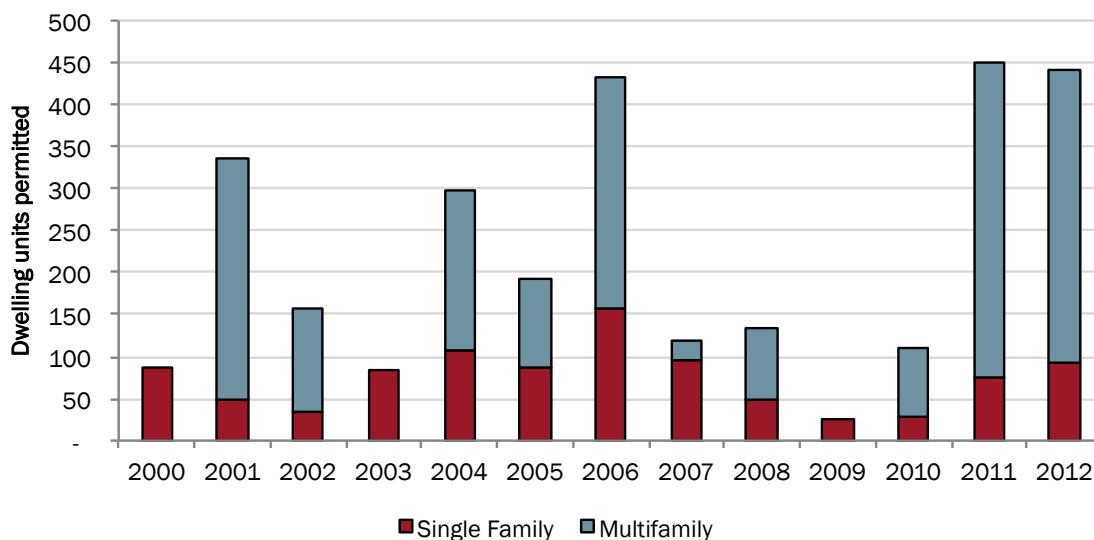
Source: City of Wilsonville Building Permit Database 2012 and Comprehensive Plan and Zoning designations; Analysis by ECONorthwest
Note: Single-family includes single-family detached, single-family attached, and manufactured homes, not including accessory dwelling units.

Table 3-1. Dwelling units approved through building permits issued for new residential construction, Wilsonville, January 1, 2000 to December 31, 2012

Year	Single Family	Multifamily	Total
2000	87	-	87
2001	49	286	335
2002	34	122	156
2003	83	-	83
2004	107	190	297
2005	87	106	193
2006	158	274	432
2007	97	21	118
2008	50	85	135
2009	24	-	24
2010	27	84	111
2011	75	376	451
2012	92	348	440
Summary of Units Permitted			
Total	970	1,892	2,862
Percent	34%	66%	100%
Annual Average	75	146	220

Source: City of Wilsonville Building Permit Database 2012 and Comprehensive Plan and Zoning designations; Analysis by ECONorthwest
Note: Single-family includes single-family detached, single-family attached, and manufactured homes.

The images below show examples of multifamily housing developed in Wilsonville between 2000 and 2012.

Canyon Creek North, 2001

Spring Ridge, an assisted living facility in Charbonneau

Canyon Creek North, 2002

Village at Main, 2004

Jory Trail, 2011-2012

Bell Tower, 2011-2012

The Charleston, Villebois

Table 3-2 shows the permits issued for both new single-family and new multifamily dwellings in selected cities in the Portland Region between 2000 and 2012. Table 3-2 shows that the majority of housing development in the region occurred in Portland and Hillsboro. Wilsonville accounted for 3% of single-family units permitted and 6% of multifamily units permitted within the Portland Region.

Table 3-2. Total permitted single-family and multifamily dwellings by year, selected cities in the Portland Region, 2000 to 2012

	Single-family detached		Multifamily		Total	
	Units	Percent of Region	Units	Percent of Region	Units	Percent of Region
Beaverton	2,991	8%	2,937	9%	5,928	9%
Forest Grove	1,216	3%	251	1%	1,467	2%
Happy Valley	2,667	7%	163	1%	2,830	4%
Hillsboro	6,379	17%	4,082	13%	10,461	15%
Lake Oswego	1,042	3%	104	0%	1,146	2%
Milwaukie	179	0%	68	0%	247	0%
Oregon City	2,817	8%	206	1%	3,023	4%
Portland	11,090	30%	21,138	66%	32,228	46%
Sherwood	1,920	5%	265	1%	2,185	3%
Tigard	3,133	8%	214	1%	3,347	5%
Troutdale	627	2%	402	1%	1,029	1%
Tualatin	1,100	3%	281	1%	1,381	2%
West Linn	1,359	4%	147	0%	1,506	2%
Wilsonville	970	3%	1,892	6%	2,862	4%
Total units permitted in selected cities	**37,490**	**100%**	**32,150**	**100%**	**69,641**	**100%**

Source: U.S. Census, Building permits data site, http://censtats.census.gov/bldg/bldgprmt.shtml
Note: Wilsonville data is based on the permit data in Table 3-1 from the City of Wilsonville, not from the Census
Note: For Wilsonville, Single-family includes single-family detached, single-family attached, and manufactured homes.

Trends in foreclosures

Housing foreclosure activity was substantially higher than normal between 2007 and 2012. Nationally, foreclosure activity is decreasing after the peak in 2009. In Oregon, Clackamas County, and Washington County, foreclosure activity decreased from highs in 2011, with large decreases in foreclosures starting the Fourth Quarter of 2012. Compared to Third Quarter 2012, foreclosure related activity (e.g., foreclosure inventories and foreclosure filings) decreased by more than half at the State-level and by more than 60% in Clackamas and Washington Counties.

Foreclosure activity in Wilsonville and nearby cities (e.g., Tigard, Tualatin, Beaverton, or Hillsboro) followed the same pattern. Foreclosure filings in

Wilsonville and nearby cities decreased by about 90% between Third Quarter 2012 and Third Quarter 2013. The number of for-sale dwellings in foreclosure decreased by more than 70% in Wilsonville and nearby cities over the same period.

Trends in housing mix

Housing mix is the mixture of housing structure types (e.g., single-family detached or apartments) within a city. The housing mix by type (i.e., percentage of single family or multi-family units) is an important variable in any housing needs assessment. Distribution of housing types is influenced by a variety of factors, including the cost of new home construction, area economic and employment trends, demographic characteristics, and amount of land zoned to allow different housing types and densities.

This section presents housing mix data for two periods (1) housing mix over the 2001 to 2012 period based on data from the City of Wilsonville and (2) housing mix over the 2000 to 2007-2011 period based on data from the American Community Survey from the U.S. Census.

There are several ways to look at change in housing mix over time, each of which shows a slightly different mix of housing. Table 3-3 shows the mix of housing units in Wilsonville in the fourth quarter of 2012.

Table 3-3. Wilsonville Housing Unit Inventory, 2012

Housing type	Number of units	Percent of total
Single-Family	**3,931**	**42%**
Single-Family	3,768	40%
Mobile Home	163	2%
Multifamily	**5,486**	**58%**
Duplex	68	1%
Condominium	563	6%
Apartment	4,855	52%
Total	**9,417**	**100%**

Source: Wilsonville Housing Unit Inventory, 4th quarter 2012
Note: Single-family includes single-family detached, single-family attached, and manufactured homes.

Figure 3-2 shows changes in the mix of Wilsonville's housing stock from 1990 to 2012. The percentage of single-family housing varied from 54% in 1995 to 43% in 2012.

Figure 3-2. Change in housing mix, all housing stock, Wilsonville, 1990 to 2012
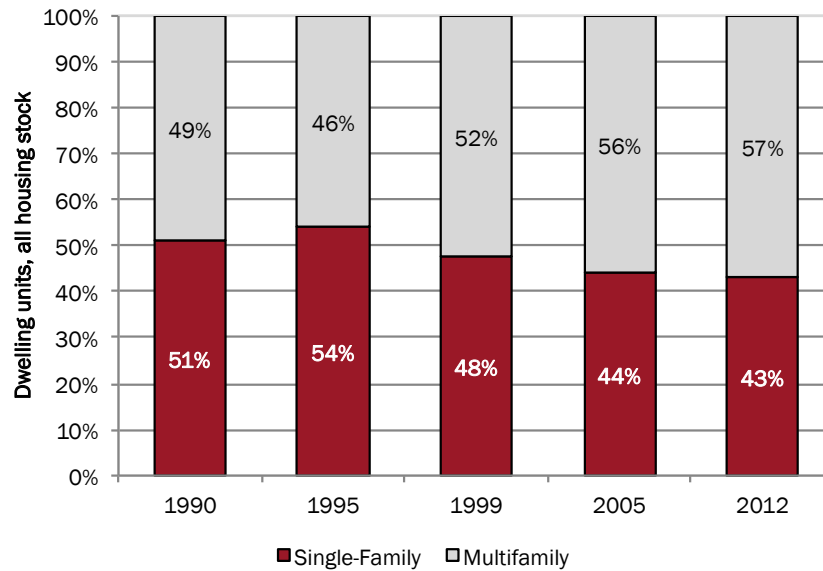
Source: 1990: Annual City housing inventory report, 1995: Annual City housing inventory report
1999: Comprehensive Plan, 2005: 2005 Wilsonville Housing Study, 2012: Annual City housing inventory report

OAR 660-007-0030 requires that jurisdictions "Provide the opportunity for at least 50 percent of new residential units to be attached single family housing or multiple family housing or justify an alternative percentage based on changing circumstances." This means that the City is required to designate sufficient land in zones that allow multifamily housing so that half of all new housing could be multifamily.

Starting with its Comprehensive Plan in 1980, Wilsonville has planned for growth of an industrial base surrounded by quality residential areas that feature a mix of single and multi-family development, with an emphasis on open space and the natural environment. Providing a mix of housing types and densities to create a whole community was envisioned in the original Comprehensive Plan map and text. Land within the City that was planned for residential use was allocated a minimum and maximum density per acre. The planned densities have generally not changed since 1980.

For example, Wilsonville's current Comprehensive Plan includes the following policy: "The City of Wilsonville shall provide opportunities for a wide range of housing types, sizes, and densities at prices and rent levels to accommodate people who are employed in Wilsonville." The implementation measure for this policy states that Wilsonville encourages "…the construction and development of diverse housing types, but maintain a general balance according to housing type and geographic distribution, both presently and in the future. Such housing types may include, but shall not be limited to: Apartments, single-family detached, single-family common wall,

manufactured homes, mobile homes, modular homes, and condominiums in various structural forms."[7]

Based on the City's Comprehensive Plan and Zoning policies, the City has met the requirement of OAR 660-007-0030. Additionally, development is effectively implementing the adopted policies.

To put Wilsonville's housing mix in the regional context, Figure 3-3 shows unit type for the Portland Region[8] and Wilsonville in 2007-2011. Relative to the region, Wilsonville has a high percentage of multifamily units and a low percentage of single-family detached units.

Figure 3-3. Dwelling units by type, all housing stock, Portland Region and Wilsonville, 2007-2011
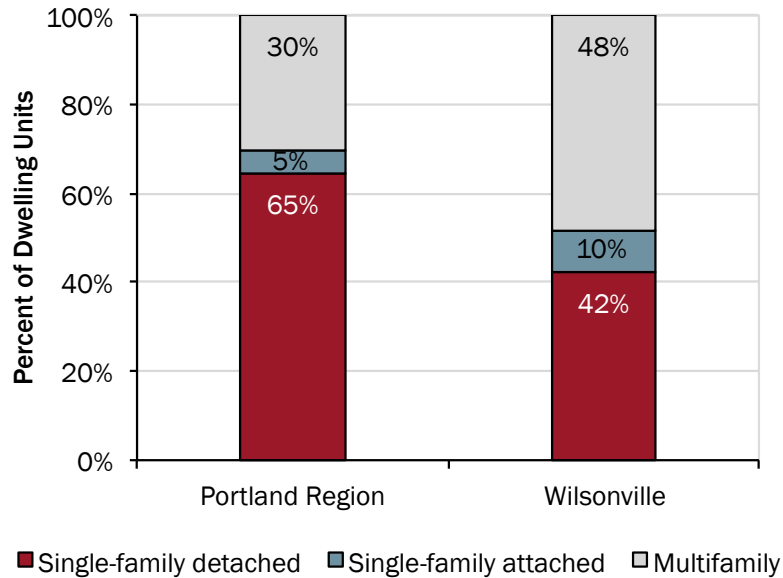
Source: 2007-2011 American Community Survey B25032

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[7] Comprehensive Plan Policy 4.1.4 and Implementation Measure 4.1.4.d.

[8] In this report, the Portland Region is defined as Clackamas, Multnomah, and Washington Counties in Oregon.

Figure 3-4 shows the housing mix of all housing stock for fifteen cities in the Metro UGB in 2007-2011. Wilsonville had the highest percentage of multifamily housing of the cities shown.

Figure 3-4. Dwelling units by type, all housing stock, selected cities in the Portland Region, 2007-2011
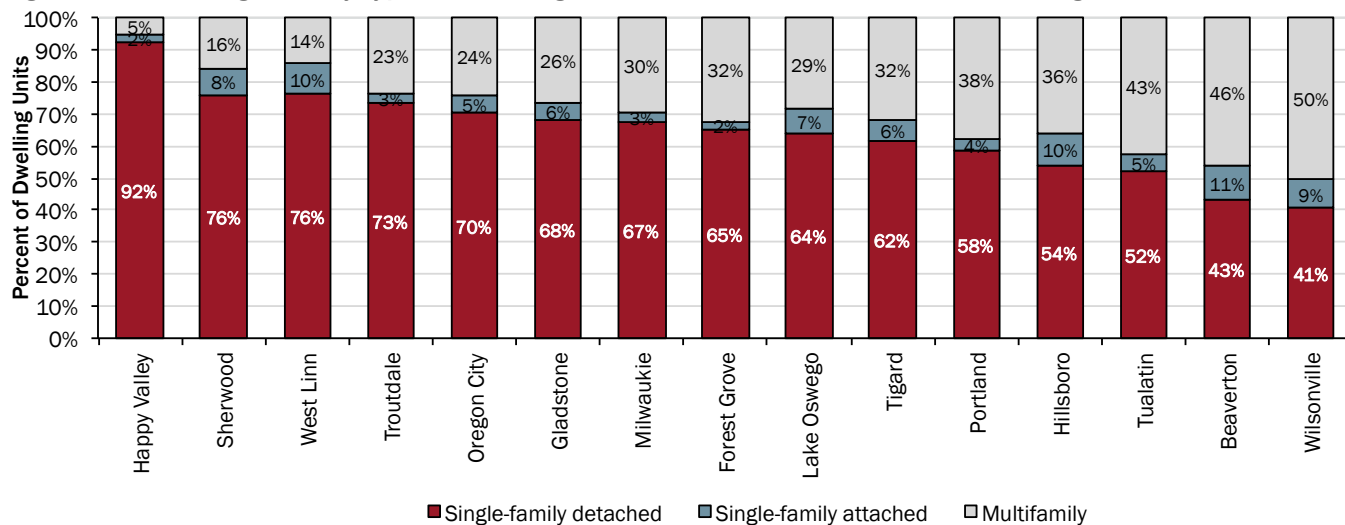
Source: 2007-2011 American Community Survey B25024

Trends in homeownership

This section describes homeownership trends, nationally as well as in the Portland Region and Wilsonville.

National trends in homeownership

Census data shows that the majority of housing in the U.S. is owner-occupied. According to analysis by the Joint Center for Housing Studies of Harvard University, the long-term market outlook shows that homeownership is still the preferred tenure, despite decreases in homeownership rates since 2006. The Urban Land Institute forecasts that homeownership will decline to the low 60 percent range by 2015.[9] In the longer-run, additional increases in homeownership rates depend, in part, on the potential owners' ability to purchase homes in the future, as well as whether the conditions that have led to homeownership growth can be sustained.

The Joint Center for Housing Studies indicates that demand for new homes could total as many as 17 million units nationally between 2010 and 2020. The location of these homes may be different than recent trends, which favored lower-density development on the urban fringe and suburban areas. The Urban Land Institute identifies the markets that have the most growth potential are "global gateway, 24-hour markets," which are primary coastal cities with international airport hubs (e.g., Washington D.C., New York City, or San Francisco). Development in these areas may be nearer city centers, with denser infill types of development.[10]

Local and regional trends in homeownership

Figure 3-5 shows changes in Wilsonville's tenure, which is the rate of homeownership and renting, for occupied units from 2000 to 2010. Wilsonville's tenure shifted over the period, with an 8% decrease in homeownership. About 54% of occupied housing in Wilsonville was renter-occupied in 2010, up from 46% in 2000.

The change in homeownership rates is the result of changes in the local, regional, and national housing markets, including changes in lending practices and broader economic conditions. The previous section described the changes in national homeownership rates. Wilsonville's change in homeownership rates is also a reflection of the mix of housing in Wilsonville.

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[9] John McIlwain, "Housing in America: The Next Decade," Urban Land Institute

[10] Urban Land Institute, "2011 Emerging Trends in Real Estate"

Figure 3-2 shows that the share of single-family housing, which is most frequently owner-occupied, decreased between 1999 and 2012.

Figure 3-5. Change in tenure, occupied units, Wilsonville, 2000 and 2010
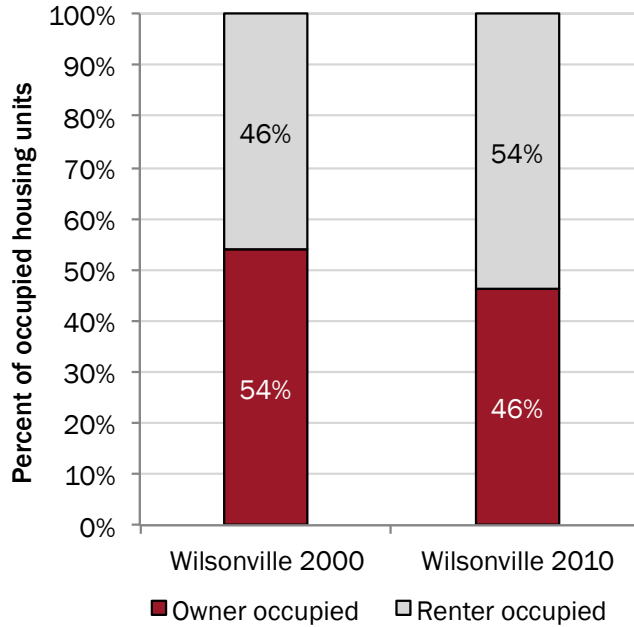
Source: 2000 Census SF1 H004, 2010 Census SF1 H4.

Figure 3-6 shows type of dwelling by tenure (owner or renter-occupied) in Wilsonville for the 2007-2011 period. Single-family housing (both attached and detached) was primarily owner-occupied, while multifamily housing was primarily renter-occupied. The homeownership rate for households in single-family detached housing was 88% and 6% for multifamily structures.

Figure 3-6. Tenure by housing type, Wilsonville, 2007-2011
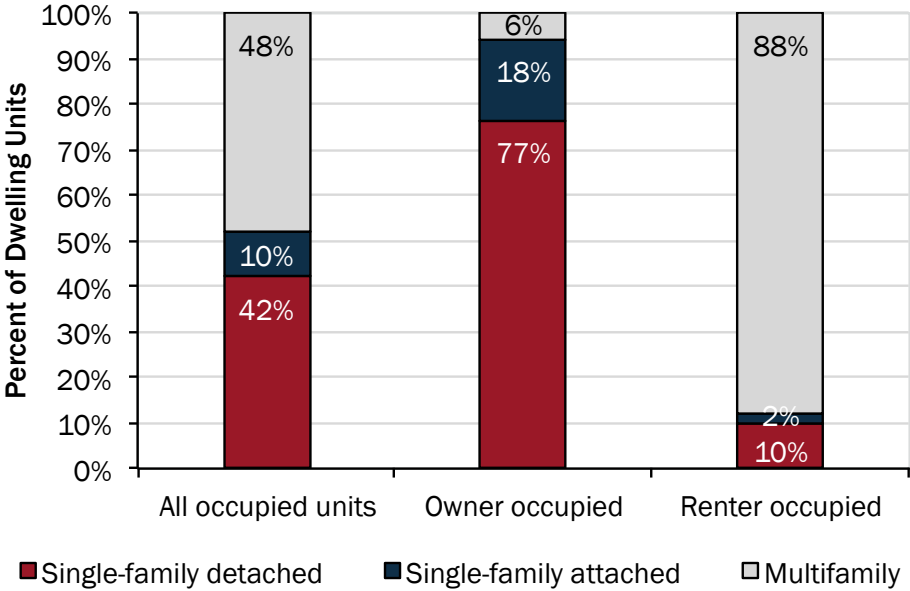
Source: 2007-2011 American Community Survey, B25032.

Figure 3-7 shows tenure in 2010 for the Portland Region and Wilsonville. The 2010 homeownership rate in Wilsonville was 46%, lower than Clackamas County (69%), Washington County (61%), or the Portland Region (60%). More than half of Wilsonville's dwelling units are renter-occupied.

Figure 3-7. Tenure, Portland Region and Wilsonville, 2010
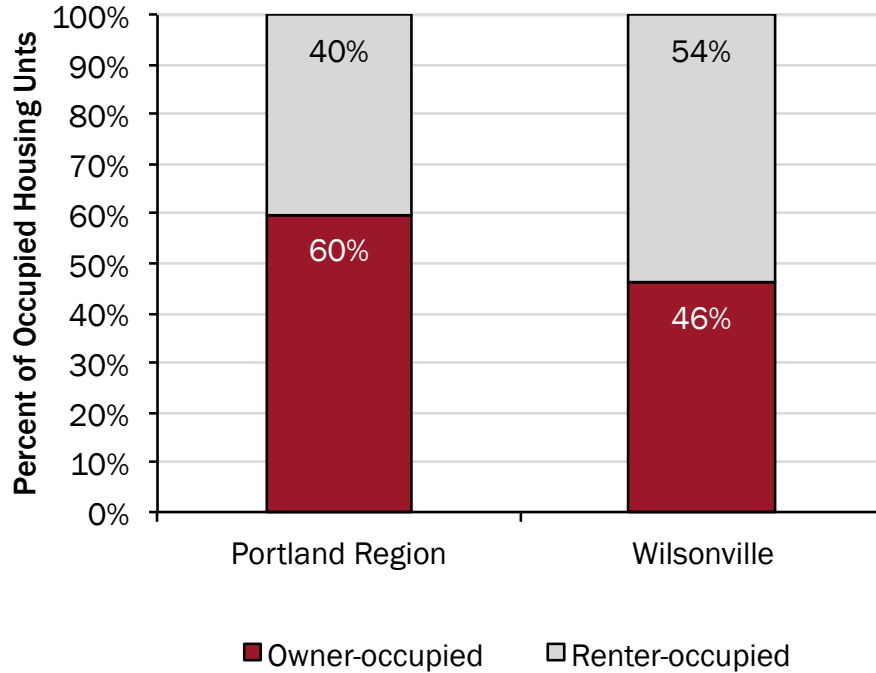
Source: 2010 US Census, H14

Figure 3-8 shows tenure for 15 cities in the Portland Metro UGB. In 2010, Wilsonville had the lowest homeownership rate of the cities shown.

Figure 3-8. Tenure, selected cities in the Metro UGB, 2010
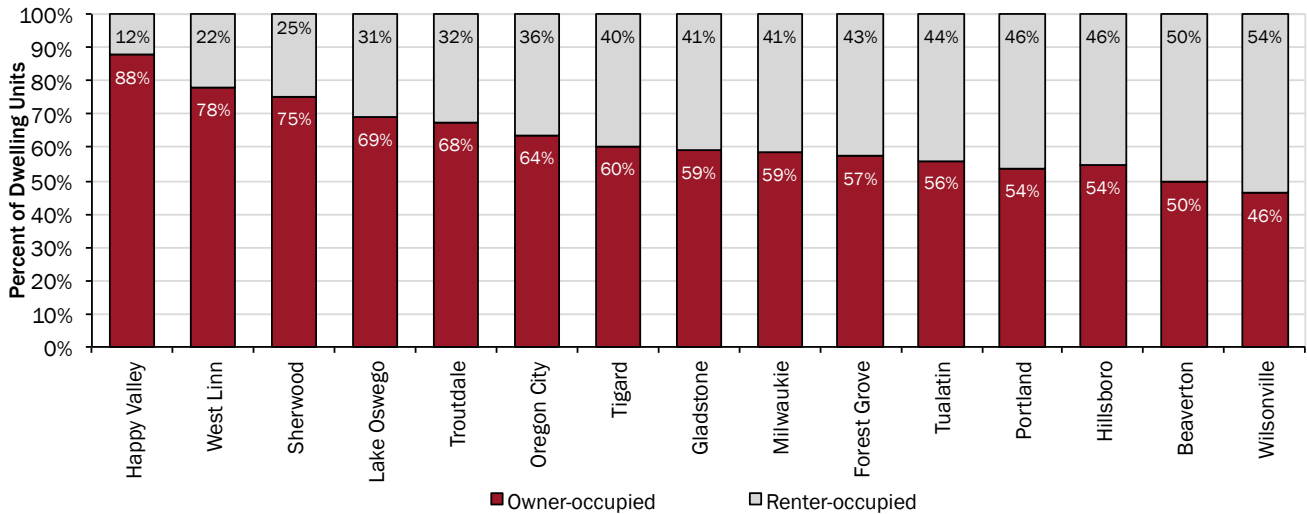
Source: 2010 US Census, H14

Residential development density in Wilsonville

Housing density is the density of housing by structure type, expressed in dwelling units per net or gross acre.[11] Housing needs analysis commonly include an analysis of historical residential densities to provide factual information to estimate future residential densities.

Table 3-4 and Table 3-5 show residential density in Wilsonville, based on development between 2000 and 2012.[12] The density analysis is based on building permit, Comprehensive Plan Designations, and tax lot information. This analysis considers density based on residential land in lots, excluding land in that was developable minus constraints (e.g., land in Wilsonville's Significant Resource Overlay Zone (SROZ)), public rights-of-way, and land in public open space.

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[11] 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.

[12] Though the text of the Comprehensive Plan does not specify whether the assigned densities are per gross or net acre, to the best knowledge of Planning staff and the City Attorney, it has always been interpreted by the City as being "gross". The 1971 General Plan specifically described density as number of units per gross acre, but the Comprehensive Plans since have not been clear. From 1980 through 1999, the Development Code included a policy about how to calculate the density of PDR sites, and this policy describes inclusion of streets, open space, dedications, etc., which amounts to "gross acreage". In 1997, when the City first submitted to Metro its planned capacity for housing, the estimates were derived from the Comprehensive Plan density designations, and described as being per gross acre. That 1997 capacity estimate set Wilsonville's long-term capacity for housing development with respect to regional requirements. All PDR applications since 2000 that staff has reviewed interpret the Comprehensive Plan density ranges as being per gross acre.

Table 3-4 shows Wilsonville's residential development density by Comprehensive Plan Designations for the 2000 to 2012 period:

- Development density in the **Residential** Plan Designation was 10.8 dwelling units per net acre.

- Development density in the **Village** Plan Designation was 18.0 dwelling units per net acre.[13]

- Development density in the **Industrial** Plan Designation was 8.5 dwelling units per net acre.

- Development density in the **Commercial** Plan Designation was 56.3 dwelling units per net acre.[14]

Table 3-4. Residential development density by Plan Designation, Wilsonville, 2000 to 2012

Plan Designation	Dwelling units	Net Acres	Net Density
Residential	1,810	168	10.8
Village	909	50	18.0
Industrial	91	11	8.5
Commercial	52	1	56.3
Total	2,862	230	12.4

Source: City of Wilsonville Building Permit Database 2012 and Comprehensive Plan and Zoning designations; Analysis by ECONorthwest
Note: The actual number of acres of land in Commercial was 0.92, which is rounded up to one acre in Table 3-4

Table 3-5 shows density of residential development constructed in Wilsonville for the 2000 to 2012 period:

- The **average** density of housing developed during the 13-year period was 12.4 dwelling units per net acre.[15]

- The average density of **Single-family** housing (including single-family detached and attached housing) was 7.6 dwelling units per net acre.

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[13] The Villebois Master Plan and subsequent development applications calculate net densities differently than does this analysis. The net density calculations for Villebois include the parcels with dwelling units and also alleys (e.g., private rights-of-way) in the net area, resulting in an average built density of 13 dwelling units per net acre. The density calculation for this study did not include or private rights-of-way in net acreage.

[14] Note: The actual number of acres of land in Commercial was 0.92, which is rounded up to one acre in Table 3-4.

[15] Density was calculated by dividing acres by the number of dwelling units. For example, the calculation for single-family density is 982 dwelling units divided by 129 net acres equals 7.6 dwelling units per net acre.

- The average density of **Multifamily** housing was 18.5 dwelling units per net acre.

Table 3-5. Residential development density by housing type, Wilsonville, 2000 to 2012

Housing Type	Dwelling units	Net Acres	Net Density
Single-family	982	129	7.6
Multifamily	1,880	102	18.5
Total	**2,862**	**230**	**12.4**

Source: City of Wilsonville Building Permit Database 2012 and Comprehensive Plan and Zoning designations; Analysis by ECONorthwest
Note: Single-family includes single-family detached, single-family attached, and manufactured homes.
Note: The analysis of density did not include SROZ areas

OAR 660-007-0035 sets specific density targets for cities in the Metro UGB. OAR 660-007 requires that Wilsonville "provide for an overall density of eight or more dwelling units per net buildable acre." The City's achieved density over the 2000 to 2012 period exceeds this requirement.

Vacancy rates

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

Figure 3-9 shows vacancy rates in the Portland Region and Wilsonville in 2010. Wilsonville's 2010 vacancy rate was higher than rates in the Portland Region.

Figure 3-9. Vacancy rates for Portland Region and Wilsonville, 2010
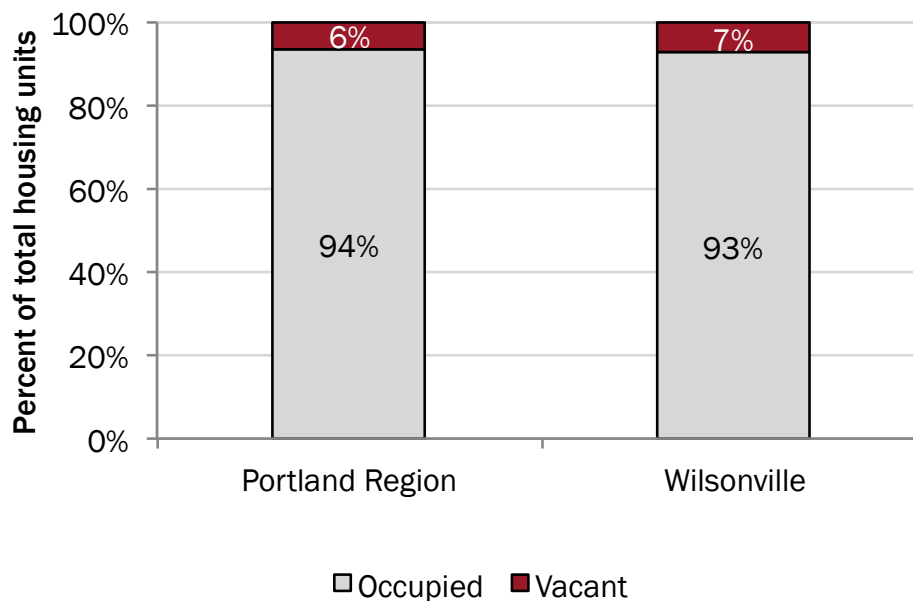
Source: U.S. Census 2010 QT-H1

Multifamily NW tracks trends in the Portland area rental market and publishes a semi-annual report. Figure 3-10 shows average market vacancy rates for apartments for the Portland/Vancouver region and selected submarkets in the south-central Portland Region. According to the Spring 2013 Apartment Report, the vacancy rate for apartments in Wilsonville was 3.8%, slightly higher than the regional average of 3.6%.

Multifamily vacancy rates vary, in part, as a result of building new multifamily developments. When a new multifamily development comes on the market, it may take months (or longer) for the new units to be absorbed into the housing market through rental of new units. During this absorption period, the vacancy rate will generally increase for multifamily housing.

Figure 3-10. Average market vacancy rates for apartments, Portland/Vancouver Metro area and selected submarkets, 2010-2013
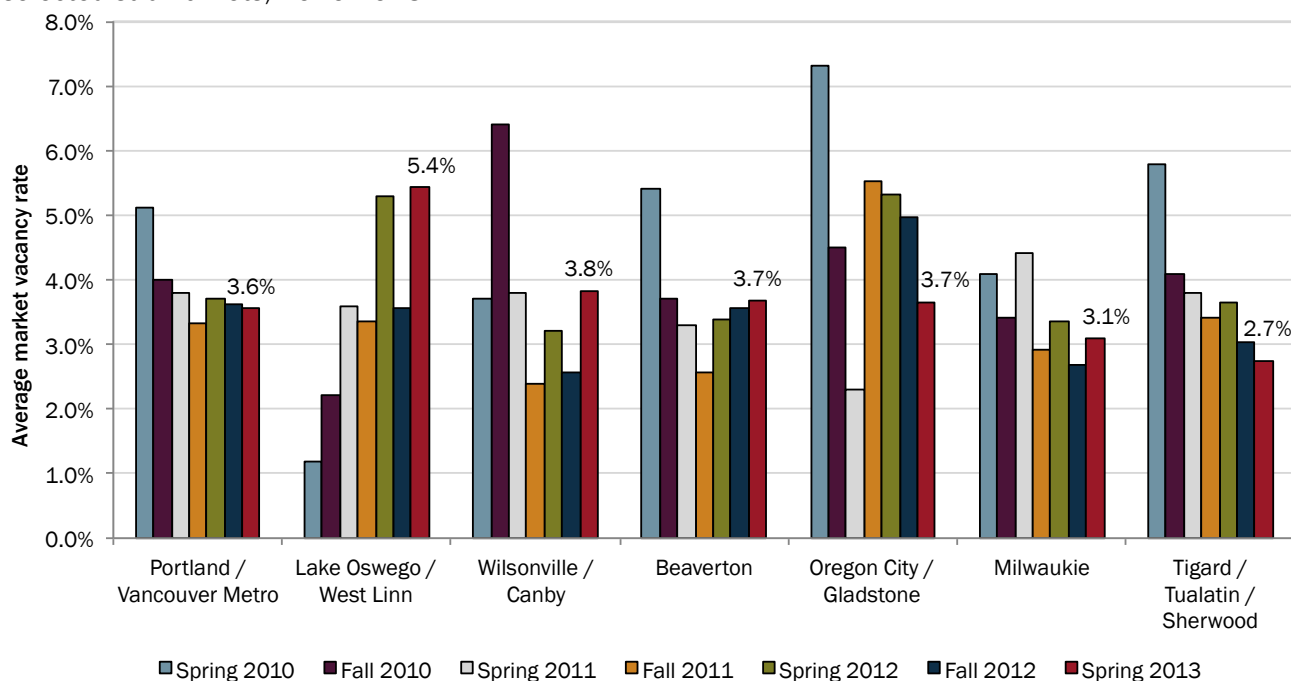
Multifamily NW Apartment Reports, Spring 2010 – Spring 2013.

Chapter 4.Demographic and Other Factors Affecting Residential Development in Wilsonville

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

Demographic trends provide a broader context for growth in a region; factors such as age, income, migration and other trends show how communities have grown and shape future growth. To provide context, we compare Wilsonville to Clackamas and Washington Counties and the Portland Region (defined here as Clackamas, Multnomah, and Washington Counties) where appropriate. Characteristics such as age and ethnicity are indicators of how population has grown in the past and provide insight into factors that may affect future growth.

SUMMARY OF THE FACTORS THAT AFFECT RESIDENTIAL DEVELOPMENT

Key findings

Demographic trends over the 2000 to 2010 period

- **Wilsonville's population grew at a faster rate than the Region or counties.** Wilsonville nearly tripled in size between 1990 and 2012, growing from 7,100 people in 1990 to over 20,500 in 2012. Between 1990 and 2012, Wilsonville grew at an average annual rate of 4.9%.

- **Wilsonville's population was younger that the Region's population.** Median age in Wilsonville was 36 in 2010, younger than Clackamas County (median age: 41) and slightly older than Washington County (median age: 35).

- **People over 60 years are forecast to have the fastest growth in the Region.** In the Portland Region, the percentage of population that is 60 years and older is projected to increase from 14% of the population in 2000 to 23% in 2040.

- **The Hispanic population is growing faster in Wilsonville than other racial or ethnic groups.** Between 2000 and 2010, Wilsonville's Hispanic

population grew by 143%, compared with 74% growth in Clackamas County and 67% growth in Washington County.

- **The Hispanic population is projected to continue to be the fastest growing group in the nation over the next decades.** The U.S. Census forecasts that Hispanics will account for 25% of the nation's population by 2050.

Household composition in Wilsonville

- **Wilsonville had smaller household sizes than the Regional average.** The average household size in Wilsonville was approximately 2.3 persons per household in 2010; in Clackamas and Washington Counties, it was 2.6 and in the Portland Region it was 2.5.

- **Wilsonville had a larger percentage of single-person households than Clackamas or Washington counties.** In 2010, 33% of Wilsonville's households were single-person, compared with 24% of Clackamas County's households and 25% of Washington County's households. Wilsonville's percentage of single-person households increased from 28% in 2000 to 33% in 2010.

Commuting trends

- **Residents of Wilsonville typically had shorter commutes than the regional average.** Thirty-five percent of Wilsonville residents commute less than 15 minutes, compared to 27% of Clackamas County residents, 27% of Washington County residents, or 25% of Portland Region residents.

- **Wilsonville imports workers from the Portland Region.** About 16,000 people commute to Wilsonville to work, mostly from Clackamas and Washington County.

- **Relatively few people live and work in Wilsonville.** About 1,000 people live and work in Wilsonville.

- **The majority of Wilsonville's workers commute to work in other parts of the Portland Region.** About 5,100 workers commute from Wilsonville to work across the Portland Region.

Changes in housing costs

- **Sales prices for single-family dwellings in Wilsonville increased over the 2000 to 2012 period but at a slower rate than the Regional average.** Between 2000 and 2012, average sales prices in Wilsonville increased by $75,000 (31%), compared to a 54% increase in Portland Region and Washington County and 36% in Clackamas County.

- **Home sales price in Wilsonville peaked above the Regional average.** Average sales price in Wilsonville was about $473,300 in 2007, compared with the average of $354,700 in the Portland Region.

- **Rental costs in 2013 in Wilsonville were lower than the Regional average.** Average rent in the Wilsonville/Canby submarket was $0.94 per square foot in Spring 2013, lower than the regional average of $1.04 per square foot.

Trends in income and housing affordability

- **Residents of Wilsonville had lower incomes than the average for residents of Clackamas County and Washington County.** The median household income in Wilsonville was $55,316, lower than Clackamas County ($63,790) or Washington County ($63,814). Wilsonville's median household income was higher than cities such as Beaverton, Portland, and Milwaukie. Wilsonville's median household income was lower than cities such as Happy Valley, West Linn, and Lake Oswego.

- **Wilsonville's households were cost burdened at about the same rate as all households in the Region.[16]** The percentage of Wilsonville households who were cost burdened (41% of households) was similar to the average for the Portland Region and slightly above the percentages in Washington County (38%) and Clackamas County (40%).

- **Renters were more likely to be cost burdened in Wilsonville and in the Region.** The rate of cost burden was much higher for renters (48%) than for homeowners (31%) in Wilsonville. In comparison, 40% of Clackamas County households and 38% of Washington County households were cost burdened in 2007-2011.

- **Homeownership costs increased faster than incomes in Wilsonville and in the Region.** The ratio of housing value to household income in Wilsonville increased from 4.1 in 2000 to 6.7 during 2007-2011. In Clackamas County, the ratio increased from 4.7 to 5.1. In Washington County, the ratio increased from 3.5 to 4.4.

Implications for housing need in Wilsonville

Studies and data analysis have shown a clear linkage between demographic characteristics and housing choice. This is more typically referred to as the linkage between life-cycle and housing choice and is documented in detail in

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[16] HUD guidelines indicate that households paying more than 30% of their income on housing are "cost burdened."

several publications. Analysis of data from the Public Use Microsample (PUMS) in the 2000 Census helps to describe the relationship between selected demographic characteristics and housing choice. Key relationships identified through this data include:

- Homeownership rates increase as income increases;

- Homeownership rates increase as age increases;

- Choice of single-family detached housing types increases as income increases;

- Renters are much more likely to choose multiple family housing types than single-family; and

- Income is a stronger determinate of tenure and housing type choice for all age categories.

Demographic information about the Wilsonville and the region that will affect the housing needs for the city include the following:

- *Age*. Wilsonville's households are aging, consistent with Regional and national trends. However, Wilsonville's households are, on average, younger than the Regional average. It is unclear from the data whether Wilsonville is attracting more younger people because Wilsonville has a larger share of affordable multifamily housing or whether they are attracted to Wilsonville for other reasons (e.g., high quality of life). What is clear is that most people who live in Wilsonville work someplace else. While we have no strong data on causation, people clearly find Wilsonville attractive as a place of residence. Potential factors could include location; age, type or configuration of housing (e.g., urban villages such as Villebois), cost of housing (probably a stronger factor for renters); and community amenities such as access to the Willamette River, recreation facilities, or shopping.

  If Wilsonville continues to attract younger households, the City will continue to have demand for lower-cost housing, such as for multifamily renters. The biggest question, with implications for Wilsonville's future housing needs, is whether younger people who move to Wilsonville for rental opportunities will continue to live in Wilsonville if they are ready to become homeowners. The high quality of life and high quality school system in Wilsonville may make the City attractive to young would-be homeowners, if affordable owner housing is available.

- *Household size and composition.* Wilsonville's average household size is smaller than the Regional average. This is attributable, in part, to the fact that Wilsonville has a larger share of younger working aged people, as well as people over 70 years old. In addition, Wilsonville has a comparatively

large share of single-person households. These factors suggest demand for smaller housing, both for renters and owners.

- *Ethnicity*. Wilsonville's population has become more ethnically diverse over the last decade, consistent with Regional and national trends. It is likely that Wilsonville's Hispanic population will continue to grow, as is forecasted for the nation.

  If this is the case, there will be implications for the City's housing needs by increasing demand for larger rental units, both multifamily and single-family housing types, as well as affordable housing suitable for families.

- *Income*. Wilsonville's incomes are lower, on average, than the Region's incomes. This suggests that Wilsonville has and will continue to have substantial demand for lower cost housing and/or smaller units, both for renters and owners.

- *Affordability*. Wilsonville's housing sales prices are slightly higher than the Regional average but higher than the averages in some nearby cities (e.g., Hillsboro, Oregon City, or Milwaukie). Housing costs are growing faster than income, making homeownership less affordable in Wilsonville, as well as the Portland region.

Wilsonville's housing market and the demographics of the people living there have implications for economic development efforts in Wilsonville. Two of the key factors that businesses consider when locating in a city are (1) availability of skilled and educated labor, and (2) housing affordability. Wilsonville's residents are generally younger and more educated than the Regional average. Housing prices in Wilsonville are around the Regional averages, with rents a little lower than some nearby cities.

Currently, the majority of Wilsonville's residents commute outside the City for work and the majority of people employed at businesses in Wilsonville commute into the City for work. Reasons for commuting are complex and are related to the local housing market (type, quality, and affordability of housing), household characteristics (e.g., composition of the household), and employment status. This trend existed in 1980 and continues today—underscoring how challenging it is to entice households to live and work in the same community. Implementation strategies that encourage jobs-housing balance are an important step, but ultimately, the factors that affect location choices are largely independent of local policy.

In short, Wilsonville's housing policy alone is unlikely to substantially affect commuting patterns in the southern Portland Region or in Wilsonville. But the City's residential policies can provide opportunities for production of housing that is affordable to a range of households. These policies ensure that, if broader market factors make people less willing to commute (i.e., substantial increases in

gasoline prices or increases in traffic congestion), Wilsonville will be positioned to provide housing for workers at local businesses. They can also create the type of community development patterns that are desirable to individuals who work in Wilsonville.

DEMOGRAPHIC AND SOCIOECONOMIC FACTORS AFFECTING HOUSING CHOICE

Analysts typically describe housing demand as the *preferences* for different types of housing (i.e., 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).

Metro, the agency responsible for regional planning within the Portland metropolitan UGB, uses a decision support tool called Metroscope to model changes in measures of economic, demographic, land use, and transportation activity. Metroscope includes a residential location model, which projects the locations of future households based on factors such as land availability and capacity, cost of development, changes in demographics, changes in employment, and changes in transportation and transit infrastructure. The housing needs analysis in Chapter 5 of this report is based on the Metroscope forecast of household growth in Wilsonville over the next 25 years.

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.[17]

- **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.

- **Size of household** is the number of people living in the household. Younger and older people are more likely to live in single-person

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

> *The Case for Multi-family Housing*. Urban Land Institute. 2003
>
> E. Zietz. *Multi-family Housing: A Review of Theory and Evidence.* Journal of Real Estate Research, Volume 25, Number 2. 2003.
>
> C. Rombouts. *Changing Demographics of Homebuyers and Renters.* Multi-family Trends. Winter 2004.
>
> J. McIlwain. *Housing in America: The New Decade.* Urban Land Institute. 2010.
>
> D. Myers and S. Ryu. *Aging Baby Boomers and the Generational Housing Bubble*. Journal of the American Planning Association. Winter 2008.
>
> M. Riche. *The Implications of Changing U.S. Demographics for Housing Choice and Location in Cities.* The Brookings Institution Center on Urban and Metropolitan Policy. March 2001.
>
> L. Lachman and D. Brett. *Generation Y: America's New Housing Wave.* Urban Land Institute. 2010.

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 Wilsonville over the next 20 years.

NATIONAL AND STATE DEMOGRAPHIC AND SOCIOECONOMIC TRENDS

National trends

The following evaluation of housing trends that follows is based on previous research conducted by ECONorthwest for other housing needs studies as well as new research. This evaluation is based, in part, on conclusions from The State of the Nation's Housing, a 2012 report from the Joint Center for Housing Studies of Harvard University.

- Despite decades of growth and the recent decline in vacancy rates, rents have failed to keep pace with inflation. Between the peak in late 2008 and 2011, inflation-adjusted rents fell by more than 4%.

- House prices declined since the height of the housing bubble. Between October 2005 and March 2010, the median house price decreased by 26%. The price declines were about 50% greater than price declines at the high end of the housing market. The median home sales price dropped from 4.7 times the median household income in 2005 to 3.4 times the median household income in 2009.

- In 2011, for the first time since the early 1970's, monthly housing costs for mortgages on the typical home were less costly than the average rental unit.

- In 2010, more than one-third of American households spent more than 30% of income on housing, and 18% spent upwards of 50%.[18] The number of severely cost-burdened households (spending more than 50% of income on housing) increased by 6.4 million households from 2001 to 2010, to a total of nearly 20.2 million households in 2010. In 2010, there

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[18] 2010 American Community Survey, Table B25091 and Table B25070.

was a 5.1 million unit gap between supply and demand for affordable housing units.

- Immigration will play a key role in accelerating household growth over the next 10 years. About 40% of the fall-off in household growth between 2007 and 2011 was due to a drop in immigration. Immigrants have traditionally comprised a growing percent of young adults and children in the United States.

- The largest generation of people in the U.S. is the Echo Boomers, with about 85 million people in 2010.[19] The Echo Boom generation is likely to grow even larger as new immigrants arrive. The oldest Echo Boomers turned 25 in 2010 and are beginning to form households. Echo Boomers will be the primary driver of growth in new households over the next twenty years.

- An aging population, baby boomers in particular, will drive changes in the age distribution of households in all age groups over 55 years. Second home demand among upper-income homebuyers of all ages also continues to grow, many of whom may be younger baby boomers. The ability to purchase second homes may be negatively affected by diminished earnings and lack of equity in primary homes. A recent survey of baby boomers showed that more than a quarter plan to relocate into larger homes and 5% plan to move to smaller homes.

- The younger baby boomers face challenges resulting from the decrease in housing values, which has left many households with mortgages that are higher than the worth of the house. It may take years for the value of these houses to equal or exceed the value of the mortgage.

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[19] Echo Boomers are generally people born between the mid-1980's and the early 2000's. This group is sometimes referred to as Generation Y or the Millennials.

State Demographic Trends

Oregon's Draft *2011-2015 Consolidated Plan* includes a detailed housing needs analysis as well as strategies for addressing housing needs statewide.[20] The plan concludes that "Oregon's changing population demographics are having a significant impact on its housing market." It identified the following population and demographic trends that influence housing need statewide. Oregon is:

- Growing more slowly than the national average since 2007

- Facing housing cost increases, higher unemployment, and lower wages, when compared to the nation

- Having higher foreclosure rates since 2005, compared with the previous two decades

- Losing federal subsidies on about 8% of federally subsidized Section 8 housing units

- Losing housing value in some markets within Oregon

- Losing manufactured housing parks, with a 25% decrease in the number of manufactured home parks between 2003 and 2010

- Increasingly older, more diverse, and less affluent households[21]

The US Census shows demographic changes taking place in Oregon. Oregon's minority population grew quickly over the last decade. Minorities made up 16.5% of the population in 2000 and 21.5% of the population in 2010, a 46% increase. Hispanics and Latinos make up a large percentage of that population. The Hispanic population grew rapidly in Oregon during the 2000's. The growth rate of Oregon's non-Hispanic population between 2000 and 2010 was 7.5% compared to 63.5% for Hispanics and Latinos. However, Hispanic per capita income in 2010 was only 47% of white per capita income.

Growth in the Hispanic population slowed after 2007 as the Great Recession took hold and employment opportunities dwindled. If the economy rebounds, the Hispanic population may return to more typical growth during the second half of the 2010's.

The Hispanic population has different housing preferences and homeownership trends than the population as a whole. These include:

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[20] http://www.ohcs.oregon.gov/OHCS/HRS_Consolidated_Plan_5yearplan.shtml

[21] State of Oregon *Draft Consolidated Plan 2011 to 2015*

- **A lower total level of homeownership.** Figure 4-1 shows that a smaller percentage of Hispanic households were homeowners (40%) in 2010, compared with non-Hispanic households (64%).
- **Higher levels of homeownership among young households.** 49% of Hispanic households aged 25 to 44 years were homeowners, compared with 24% of non-Hispanic households.
- **Higher fertility rates than non-Hispanic residents.** In 2010, for Oregon, white non-Hispanic women between the ages of 15 and 50 had 49 births per 1,000, lower than black non-Hispanics (59 per 1,000), and Hispanic (78 per 1,000).

If these trends continue and the Hispanic population grows, there will be more young households (possibly with young children) in the market for purchasing a home. This has implications for the types of housing needed to meet the needs of these households.

Figure 4-1. Homeownership distribution by age of householder and Hispanic origin, Oregon, 2010
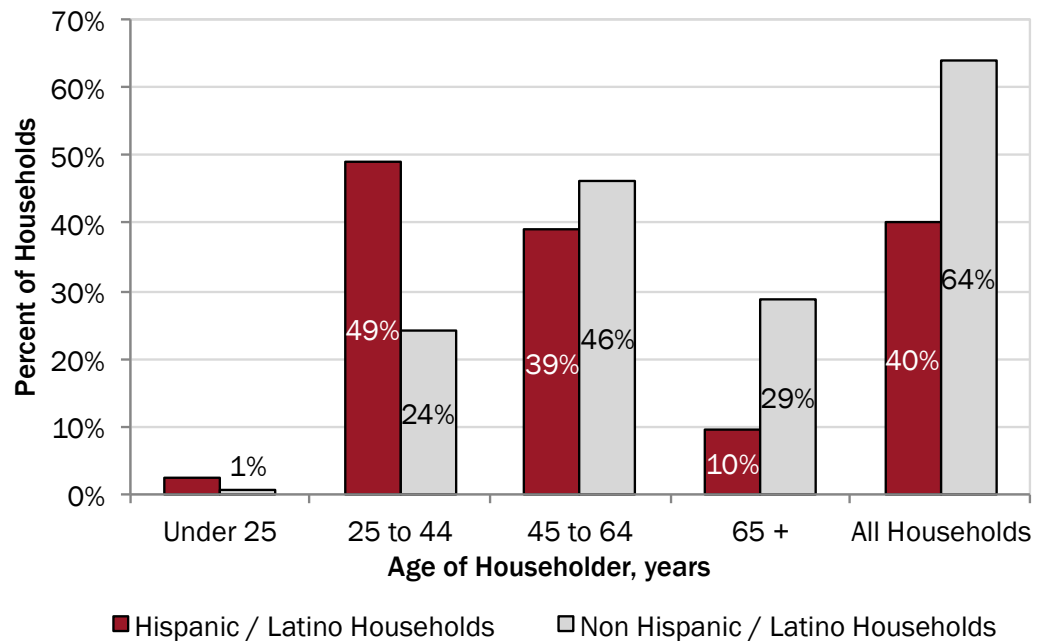
Source: U.S. Census 2010 SF1 H17, H17H. Table shows the age of the head of household for owner occupied housing units.

REGIONAL AND LOCAL DEMOGRAPHIC TRENDS

Regional demographic trends largely follow the statewide trends discussed above, but provide additional insight into how demographic trends might affect housing in Wilsonville. 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. This section describes those trends.

Population Growth

Table 4-1 shows population growth for Wilsonville and other areas from 1990 to 2012. Wilsonville grew at a faster rate than the Region or counties, growing from 7,100 people in 1990 to over 20,500 in 2012. Wilsonville grew at an average annual rate of 4.9% between 1990 and 2012 and 3.2% between 2000 and 2012.

Table 4-1. Population change, 1990-2012

| | 1990 | 2000 | 2010 | 2012 | Change 1990 to 2012 | | |
					Number	Percent	AAGR
U.S.	248,709,873	281,421,906	308,745,538	313,914,040	65,204,167	26%	1.1%
Oregon	2,842,337	3,421,399	3,831,074	3,883,735	1,041,398	37%	1.4%
Portland Region	1,174,291	1,444,219	1,641,036	1,672,970	498,679	42%	1.6%
Washington County	311,554	445,342	529,710	542,845	231,291	74%	2.6%
Clackamas County	278,850	338,391	375,992	381,680	102,830	37%	1.4%
Wilsonville	7,106	13,991	19,509	20,515	13,409	189%	4.9%

Source: US Decennial Census 1990, 2000, 2010. PSU Population Research Center 2012. US Census Population Estimates 2012.

Population in-migration (i.e., people moving from other regions, states, and countries) accounts for the majority of population growth in Oregon. Between 1990 and 2012, 71% of Oregon's population growth was the result of in-migration. Over the same period, 69% of Clackamas County and 72% of Washington County's population growth was the result of in-migration.[22]

Between 2010 and 2020, about two-thirds of Oregon's total population growth is projected to be from net migration (in-migration minus out-migration), with the remaining one-third from natural increase (births minus deaths).[23] This is similar to the rates of in-migration during the 1990's when 70% of population growth was from net migration.

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[22] Portland State University's Population Research Center reports net migration in their *Annual Oregon Population Report*.

[23] Office of Economic Analysis "Short-Term State Population Forecast through 2020." http://www.oregon.gov/DAS/OEA/docs/economic/appendixc.pdf

Migrants to Oregon tend to have many characteristics in common with existing residents, with some differences. Recent in-migrants to Oregon are, on average, younger and more educated, and are more likely to hold professional or managerial jobs, compared to Oregon's existing population. The race and ethnicity of in-migrants generally mirrors Oregon's established pattern, with one exception: Hispanics make up more than 19% of in-migrants but only 11% of the state's population.[24]

Census data show that residents of Wilsonville were similarly mobile to residents of the Portland Region, Washington County, and Clackamas County. Figure 4-2 shows that for 2007-2011, 82% of Wilsonville residents lived in the same house in the year before, compared to 82% of residents of Washington County and the Portland Region and 86% of residents of Clackamas County.

Residents of Wilsonville who moved were similarly likely to have lived in a different county as residents of the Portland Region, Washington County, and Clackamas County. The implication is that Wilsonville experienced a similar percentage of its growth from migration as the region.

Figure 4-2. Place of residence in the previous year, Portland Region, Washington County, Clackamas County, and Wilsonville, 2007-2011
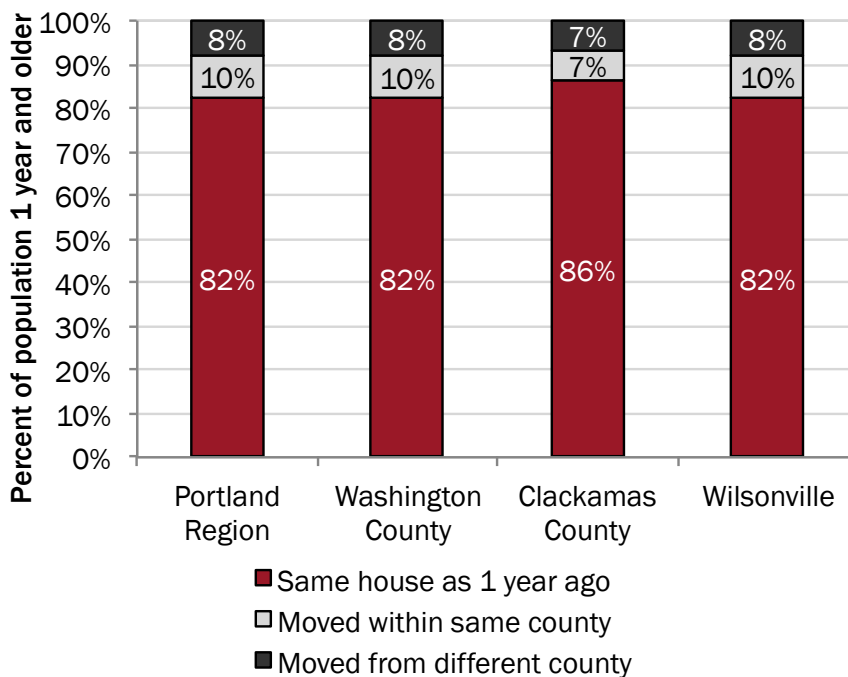
Source: U.S. Census American Community Survey 2007-2011, B07003

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[24] US Census, American Community Survey, 2006-2010.

Age Changes

Table 4-2 shows the change in median age for Oregon, Washington County, Clackamas County, and Wilsonville between 2000 and 2010. The data show that median age increased in nearly all areas over the 10-year period. Between 2000 and 2010, Wilsonville's median age increased by 1.2 years, less than the increases in most surrounding cities. In 2010, the median age in Wilsonville was 36.2, younger than the state median and the Clackamas County median.

Table 4-2. Change in median age, Oregon, Washington County, Clackamas County, selected cities in the Portland Region, 2000-2010

	2000	2010	Change 2000-2010	
			Amount	Percent
Oregon	36.3	38.4	2.1	6%
Washington County	33.0	35.3	2.3	7%
Clackamas County	37.5	40.6	3.1	8%
Hillsboro	29.7	32.0	2.3	8%
Forest Grove	31.3	32.7	1.4	4%
Troutdale	31.8	34.0	2.2	7%
Sherwood	31.4	34.3	2.9	9%
Tualatin	31.9	34.6	2.7	8%
Beaverton	32.6	34.7	2.1	6%
Portland	35.2	35.8	0.6	2%
Wilsonville	**35.0**	**36.2**	**1.2**	**3%**
Oregon City	32.7	36.3	3.6	11%
Happy Valley	37.1	37.0	-0.1	0%
Tigard	34.5	37.4	2.9	8%
Gladstone	35.5	39.2	3.7	10%
Milwaukie	37.7	39.9	2.2	6%
West Linn	38.1	41.5	3.4	9%
Lake Oswego	41.2	45.8	4.6	11%

Source: US Census 2000 and 2010, P13

Figure 4-3 shows the age distributions of Wilsonville compared with Clackamas County and Washington County for 2010. Compared with the Clackamas County, Wilsonville had a larger percentage of young, working-age residents (20-39) and a smaller percentage of people aged 50-69. Compared with Washington County, Wilsonville had larger shares of residents over 70 and residents in their twenties. Both Washington and Clackamas Counties had a larger share of children than did Wilsonville.

Figure 4-3. Population distribution by age, Clackamas County, Washington County, and Wilsonville, 2010
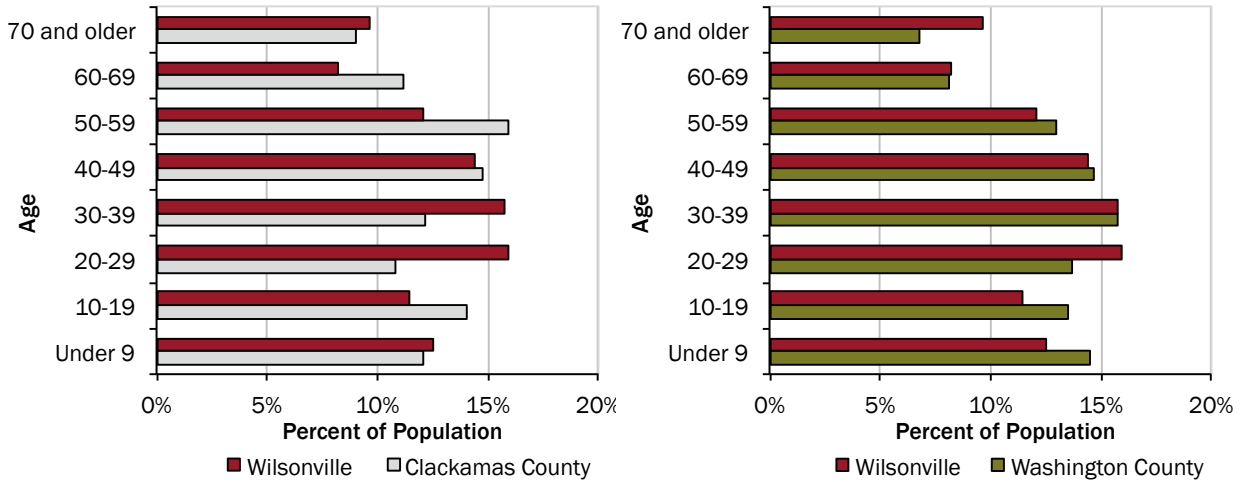
Source: U.S. Census 2010, P12

Table 4-3 shows change in age distribution in Wilsonville between 2000 and 2010. The data show that Wilsonville grew by over 5,500 people between 2000 and 2010, an increase of 39%. The age breakdown shows that Wilsonville experienced an increase in population for all age groups. The fastest growing age groups were working age populations between 25 and 64 years old.

Table 4-3. Age distribution, Wilsonville, 2000-2010

Age Group	2000		2010		Change 2000-2010		
	Number	Percent	Number	Percent	Number	Percent	Share
Under 5	1,059	8%	1,216	6%	157	15%	-1%
5-17	2,377	17%	3,067	16%	690	29%	-1%
18-24	1,318	9%	1,737	9%	419	32%	-1%
25-44	4,397	31%	6,272	32%	1,875	43%	1%
45-64	2,820	20%	4,620	24%	1,800	64%	4%
65 and over	2,020	14%	2,597	13%	577	29%	-1%
Total	13,991	100%	19,509	100%	5,518	39%	0%

Source: U.S. Census 2000 and 2010, P12

Figure 4-4 shows the Office of Economic Analysis's (OEA) forecast of population by age group for 2000 to 2040 for the Portland Region and Clackamas County. The OEA forecasts that the Portland Region and Clackamas County will experience growth in all age groups.

The fastest growing age group is people 60 years and older, which is projected to grow from 14% of the population in 2000 to 23% in 2040 for the Portland region. Similar growth is projected in Clackamas County for this age group.

Figure 4-4. Change in population distribution by age, Portland Region and Clackamas County, 2000 and 2040
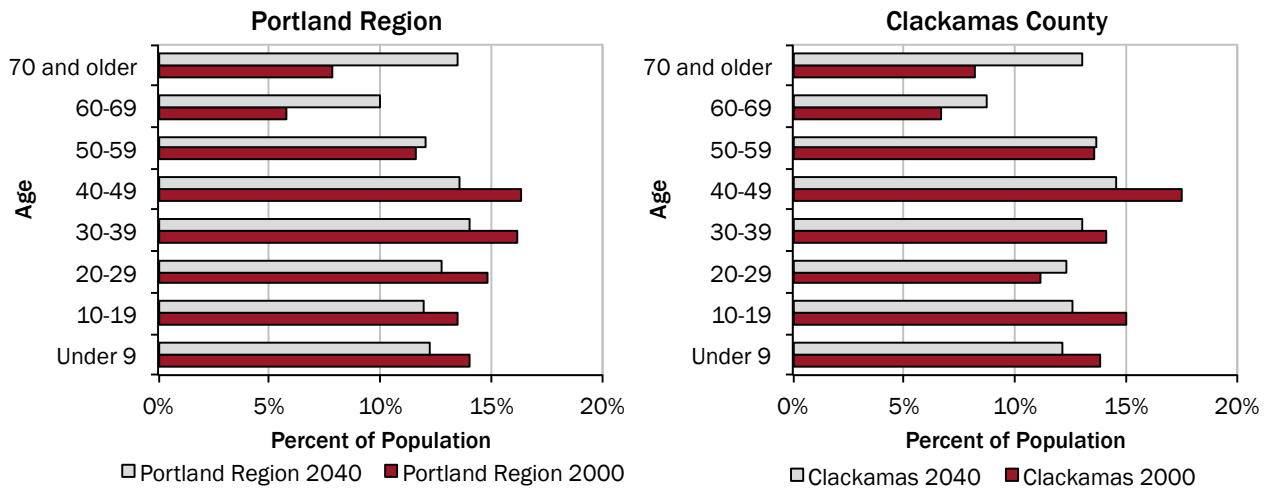
Source: Oregon Office of Economic Analysis. http://www.oregon.gov/DAS/OEA/docs/demographic/pop_by_ageandsex.xls

Ethnicity Trends

Wilsonville grew more ethnically diverse since 2000. Figure 4-5 shows change in the number of persons of Hispanic or Latino origin in 2000 and 2010. The Hispanic population grew at a faster rate than all of the population in the Portland Region, including in Wilsonville. The Hispanic population in Wilsonville increased from 6.9% of total population in 2000 to 12.1% in 2010. Wilsonville had 971 Hispanic residents in 2000 and 2,360 Hispanic residents in 2010, an increase of 143%.

Figure 4-5. Persons of Hispanic or Latino origin, Portland Region, Washington County, Clackamas County, and Wilsonville, 2000 and 2010
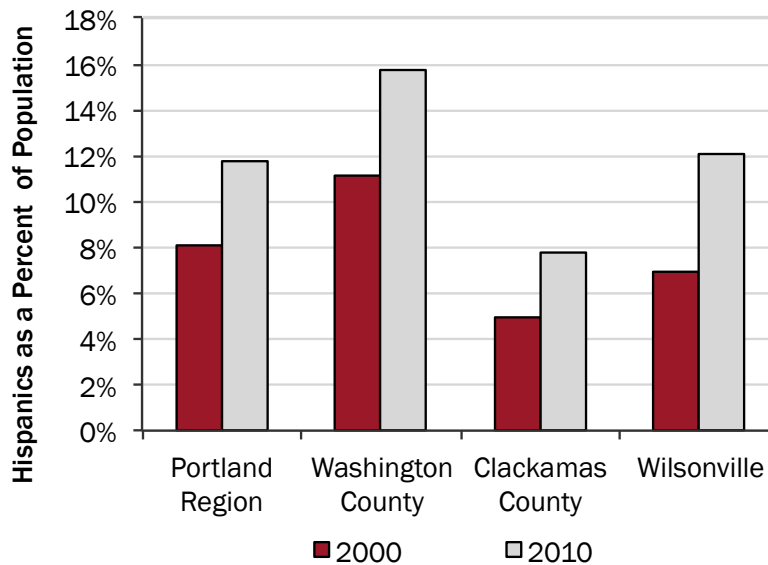
Source: US Census 2000 P008, US Census 2010 P5.

Household Composition and Size

The average household size decreased statewide over the past four decades. In Oregon, the average household size was 2.60 in 1980, 2.52 in 1990, 2.51 in 2000 and 2.47 in 2010. Households with three or more people accounted for 39% of households in 1990, decreasing to 35% in 2011. Even if the population were not growing, the impact of decreasing household size on housing demand is that there will be more households, which translates to a need for more housing units.

Table 4-4 shows that Wilsonville had an average of 2.34 persons per household in 2000, decreasing to an average of 2.28 persons per household in 2010. Wilsonville's decrease in household size is consistent with regional and state trends. In most places, this decrease is attributable to: (1) the increase in single-person households, (2) a decrease in the percent of households with children, and (3) a decrease in the number of children per household (for households with children).

Table 4-4. Average household size, Washington County, Clackamas County, and Wilsonville, 2000 and 2010

	Washington County	Clackamas County	Wilsonville
2000			
Average household size	2.61	2.62	2.34
Owner-occupied units	2.75	2.73	2.47
Renter-occupied units	2.39	2.34	2.18
2010			
Average household size	2.6	2.56	2.28
Owner-occupied units	2.71	2.66	2.48
Renter-occupied units	2.44	2.33	2.11
Change 2000 to 2010			
Average household size	-0.01	-0.06	-0.06
Owner-occupied units	-0.04	-0.07	0.01
Renter-occupied units	0.05	-0.01	-0.07

Source: U.S. Census 2000 and 2010 H12

Figure 4-6 shows that the percent of one-person households in Wilsonville increased from 28% in 2000 to 33% in 2010, a larger change than in Clackamas County, Washington County, or the Portland Region. These changes are consistent with the decrease in average household size shown in Table 4-4.

Figure 4-6. Household size, Portland Region, Washington County, Clackamas County, and Wilsonville, 2000 and 2010
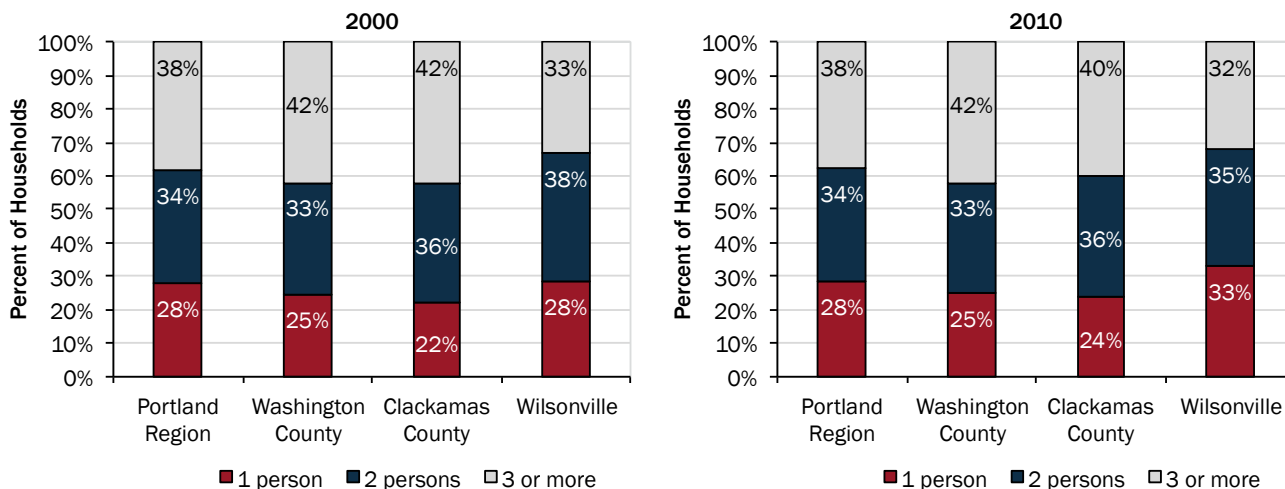
Source: U.S. Census 2000 H015, U.S. Census 2010 H16

The historical change in household size in Wilsonville over the last quarter-century has been a relatively slow decrease: from 2000 to 2010 the average annual rate of decrease was on the order of 0.25% per year. It is unclear whether Wilsonville's household size will continue to decrease. Several trends may affect household future household size in Wilsonville:

- **Aging of the population.** Householders 45 years and older are more likely to live in single-person households and the OEA forecasts the greatest growth for people 60 years and older in Clackamas County over the next 20 years. The implication is that household size may decrease as a result of the aging of the population.

- **Growth in Hispanic population.** Average household size for Hispanic households in Clackamas County was 3.6 persons per household in 2010, compared with the County average of 2.6 persons per household. Hispanic households generally have larger household sizes than the national average for first, second, and third generation immigrants.[25]

[25] Pew Research Center. *Second-Generation Americans: A Portrait of the Adult Children of Immigrants*, February 7, 2012

Figure 4-7 shows that Wilsonville had a larger percentage of nonfamily households (40%) than the Portland Region, Clackamas County or Washington County.

Figure 4-7. Household composition, Portland Region, Washington County, Clackamas County, and Wilsonville, 2010
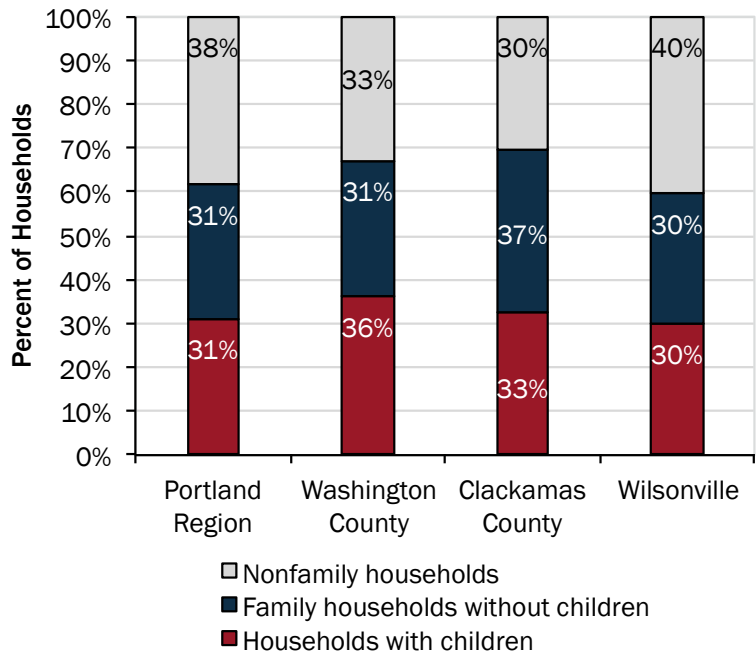
Source: US Census 2010, P20

Income

Income is one of the key determinants in housing choice and households' ability to afford housing. Table 4-5 shows that median household income in Wilsonville was $55,316, 13% less than median household income in Clackamas County ($63,790) and Washington County ($63,814). Wilsonville's median household income in 2007-2011 was higher than five cities in the Portland Region and lower than other cities in the Region.

Table 4-5. Median household income, nominal dollars
Washington County, Clackamas County, selected cities
in the Portland Region, 2010 and 2007-2011

	1999	2007-2011
Washington County	$52,054	$63,814
Clackamas County	$51,680	$63,790
Gladstone	$45,753	$48,876
Forest Grove	$38,100	$49,034
Portland	$40,227	$50,177
Milwaukie	$43,466	$52,625
Beaverton	$47,752	$55,115
Wilsonville	**$51,648**	**$55,316**
Oregon City	$45,024	$57,618
Tualatin	$55,735	$60,818
Troutdale	$57,238	$62,429
Tigard	$51,641	$62,521
Hillsboro	$51,575	$64,197
Sherwood	$62,663	$79,209
Lake Oswego	$71,724	$81,669
West Linn	$72,526	$92,342
Happy Valley	$90,978	$100,647

Source: US Census 2000 SF 3, HCT012. American Community Survey 2007-2011, B19001.
Note: For the 2007-2011 data, respondents were polled between 2007 and 2011 and were asked to report their income for the previous year.

Figure 4-8 shows distribution of annual household income for Wilsonville. Wilsonville had a larger percentage of households with income of under $25,000 than either Clackamas County or Washington County.

Figure 4-8. Distribution of household income, Wilsonville, Clackamas County, Washington County, 2007-2011
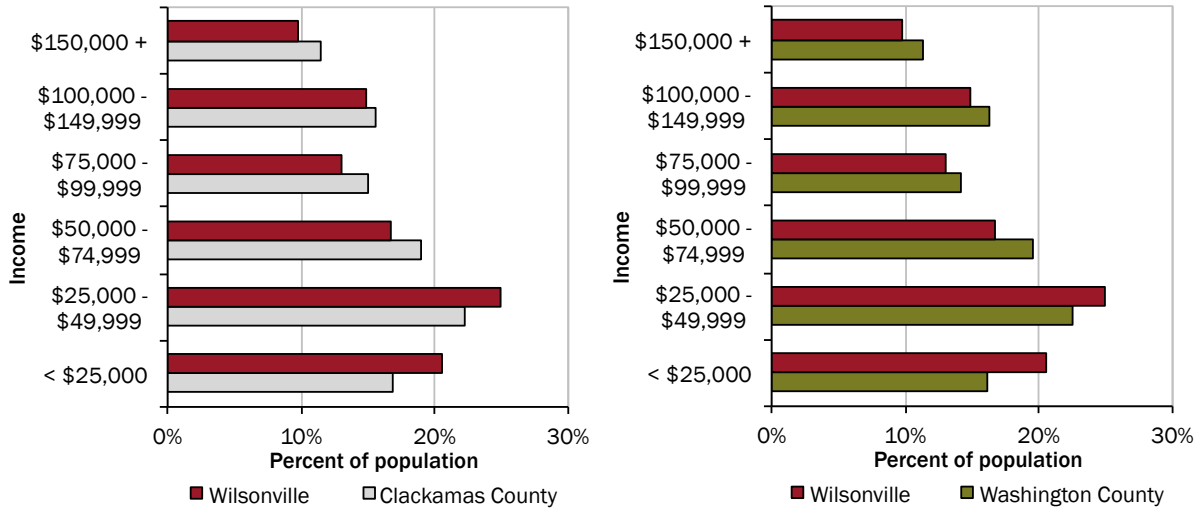
Source: American Community Survey 2007-2011, B19001.
Note: The income data was gathered in 2007-2011. Respondents were asked to report their income for the previous year. All incomes are reported in 2011 dollars.

Educational Attainment

Figure 4-9 shows that educational attainment levels for residents of Wilsonville were similar to those of all residents in Clackamas County and Washington County. More than 70% of Wilsonville's residents had at least some college and 47% had a Bachelor's degree or higher.

Figure 4-9. Educational attainment of residents 25 years and older for Wilsonville, Clackamas County, and Washington County, 2007-2011
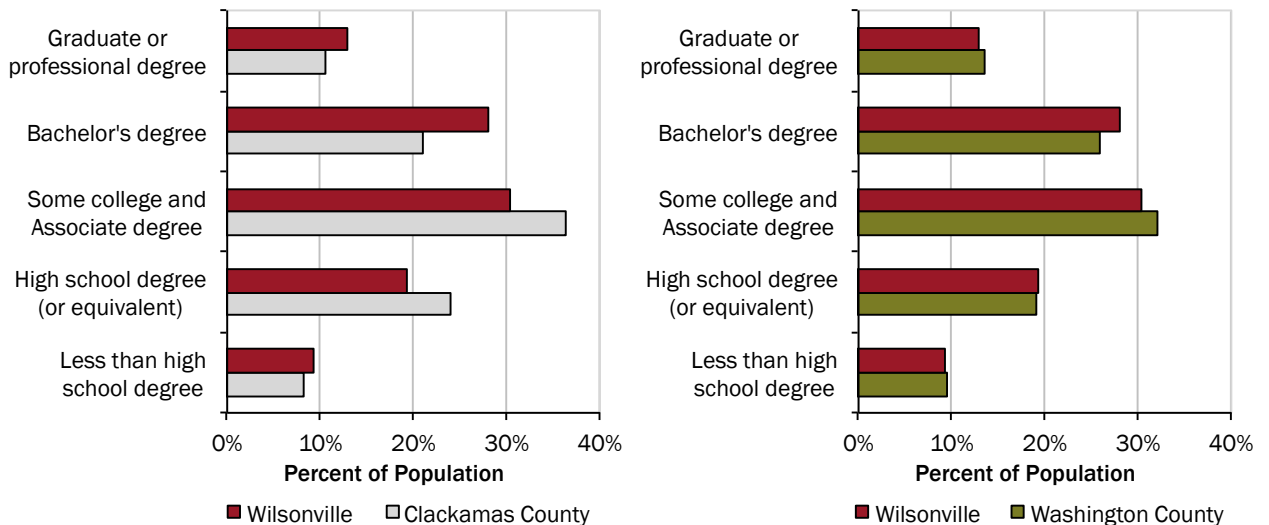
Source: American Community Survey 2007-2011 B15002

Commuting Trends

According the 2007-2011 American Community Survey and 2010 data from the Local Employment Dynamics program of the US Census, residents of Wilsonville worked across the Portland Region.

Workers from across the Portland Region commute to work in Wilsonville. Figure 4-10 shows employment inflow and outflow for Wilsonville in 2010. Over 17,000 people had their primary job in Wilsonville in 2010; of those, only about 1,000 (6.5%) lived in Wilsonville.

About 16,000 people work in Wilsonville and live elsewhere. Table 4-6 shows that more than half of these workers live in Washington or Clackamas County.

In addition, more than 5,000 people living in Wilsonville commute to other places for work. Table 4-7 shows that more than three-quarters of these residents of Wilsonville worked in the Portland Region.

Figure 4-10. Employment inflow and outflow, Wilsonville, 2010
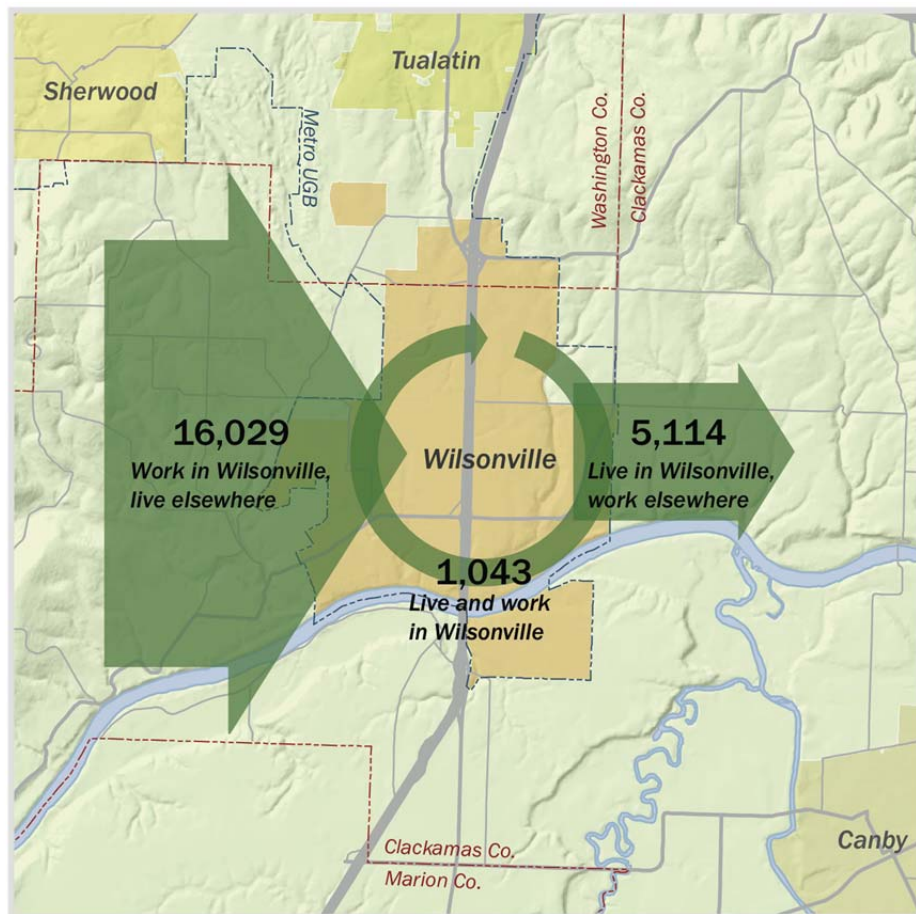
Source: ECONorthwest, with data from U.S. Census Bureau, Center for Economic Studies, OnTheMap. http://onthemap.ces.census.gov/. (April 22, 2013)

Figure 4-11 and Table 4-6 show where employees of firms located in Wilsonville lived in 2010. More than half of workers employed in Wilsonville lived in either Clackamas or Washington County; each county accounted for about 27% of workers employed in Wilsonville. Fourteen percent of workers in Wilsonville lived in Multnomah County. About 6% of workers employed in Wilsonville also lived in Wilsonville.

Table 4-6. Places where workers in Wilsonville lived, 2010

Location	Number	Percent
Clackamas County	4,678	27%
Wilsonville	1,043	6%
West Linn	447	3%
Washington County	4,556	27%
Beaverton	741	4%
Tualatin*	657	4%
Tigard	609	4%
Hillsboro	437	3%
Sherwood	408	2%
Multnomah County	2,468	14%
Portland	2,039	12%
Marion County	1,874	11%
Salem	588	3%
Woodburn	397	2%
Other locations in Oregon	2,730	16%
Out of state	766	4%
Total	**17,072**	**100%**

Source: U.S. Census Bureau, Center for Economic Studies,
OnTheMap. http://onthemap.ces.census.gov/ (April 22, 2013)
*Note: Tualatin is in multiple counties.

Figure 4-11. Places where workers in Wilsonville lived, 2010

Residential Locations of Wilsonville Workers, 2010
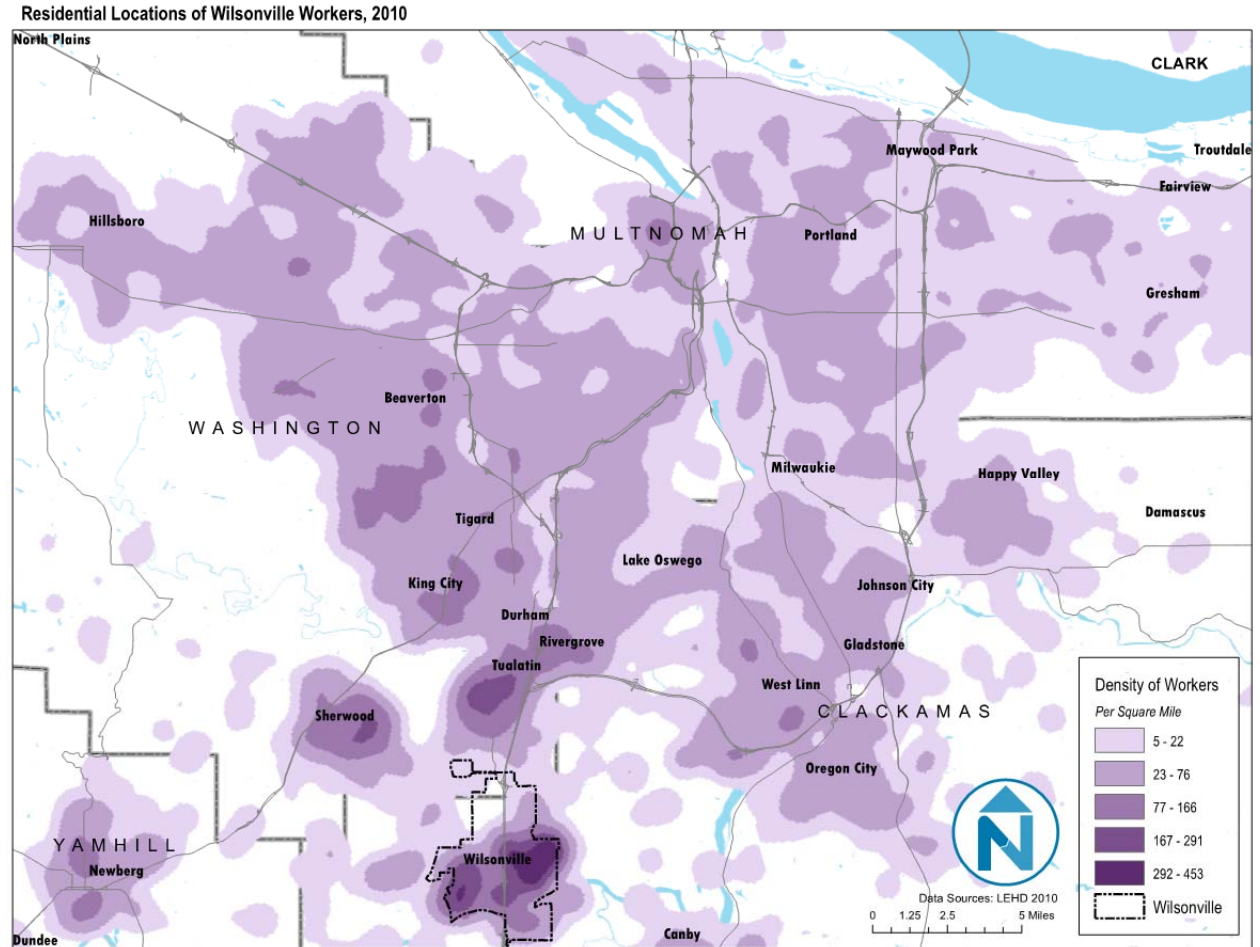
Map by Nelson\Nygaard 2013. Data from US Census Bureau, Center for Economic Studies, OnTheMap, 2010.

Figure 4-12 and Table 4-7 show where residents of Wilsonville worked in 2010. The data show that Wilsonville residents worked throughout the Portland metropolitan area, with the largest concentrations in Portland, Wilsonville, and Tualatin. Seventeen percent of workers who live in Wilsonville also work in Wilsonville.

Table 4-7. Places where residents of Wilsonville were employed, 2010

Location	Number	Percent
Clackamas County	2,014	33%
Wilsonville	1,043	17%
Lake Oswego*	250	4%
Washington County	1,663	27%
Tualatin*	378	6%
Tigard	371	6%
Beaverton	294	5%
Hillsboro	199	3%
Multnomah County	1,494	24%
Portland	1,383	22%
Gresham	81	1%
Marion County	449	7%
Salem	152	2%
Woodburn	100	2%
Other locations in Oregon	421	7%
Out of state	116	2%
Total	**6,157**	**100%**

Source: U.S. Census Bureau, Center for Economic Studies, OnTheMap. http://onthemap.ces.census.gov/ (April 22, 2013)
*Note: Lake Oswego and Tualatin are in multiple counties.

Figure 4-12. Places where residents of Wilsonville were employed, 2010
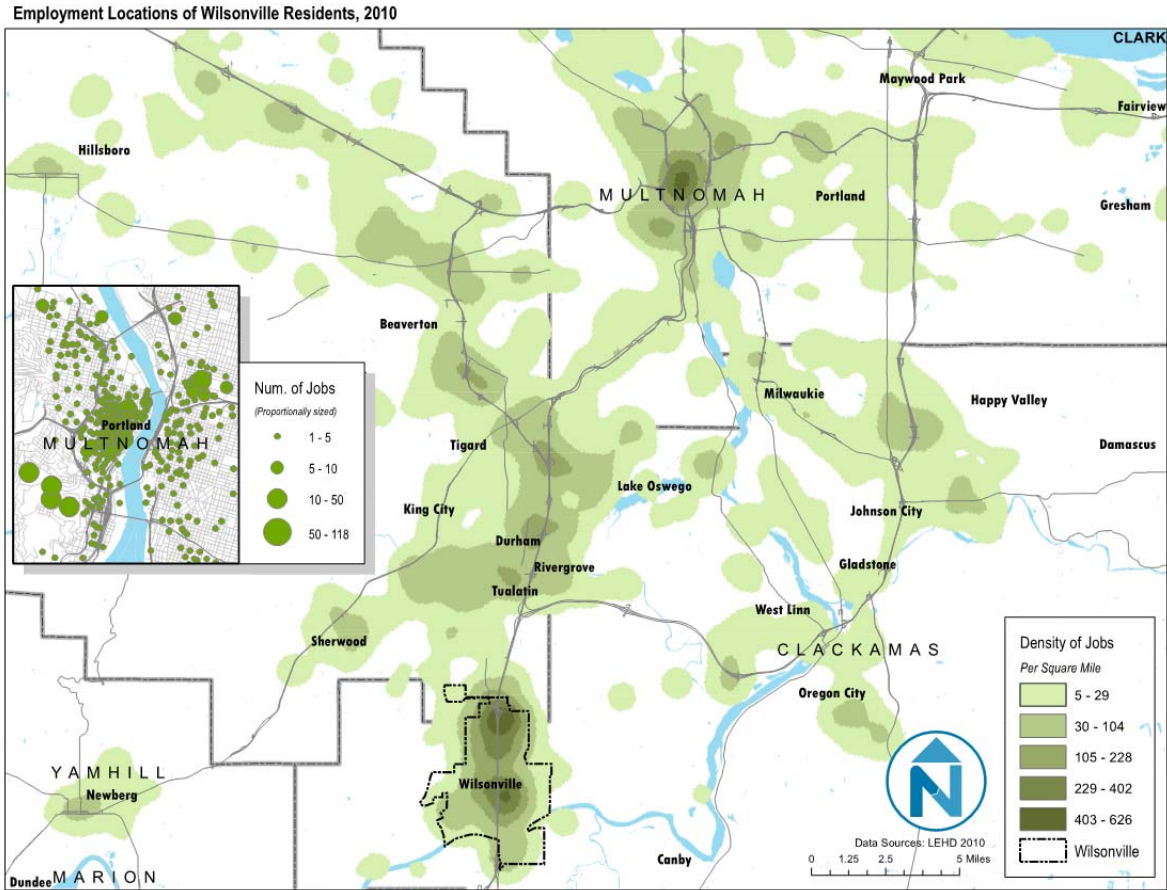
Map by Nelson\Nygaard 2013. Data from US Census Bureau, Center for Economic Studies, OnTheMap, 2010.

According to the 2007-2011 American Community Survey, the average commute time for a Wilsonville resident was just under 23 minutes, compared with 24 minutes for Washington County residents and 26 minutes for Clackamas County residents.

Figure 4-13 shows commute time for residents of Wilsonville who do not work at home. Residents of Wilsonville typically had shorter commutes than the regional average. Thirty-five percent of Wilsonville residents commute less than 15 minutes, compared to 27% of Clackamas County residents, 27% of Washington County residents, or 25% of Portland Region residents.

In 2007-2011, 8.1% of Wilsonville residents worked at home, a higher percentage than in Clackamas County (7.8%), Washington County (5.0%), or the Portland Region (6.3%)[26].

Figure 4-13. Commute times for residents who do not work at home, Wilsonville, Clackamas County, and Washington County, 2007-2011
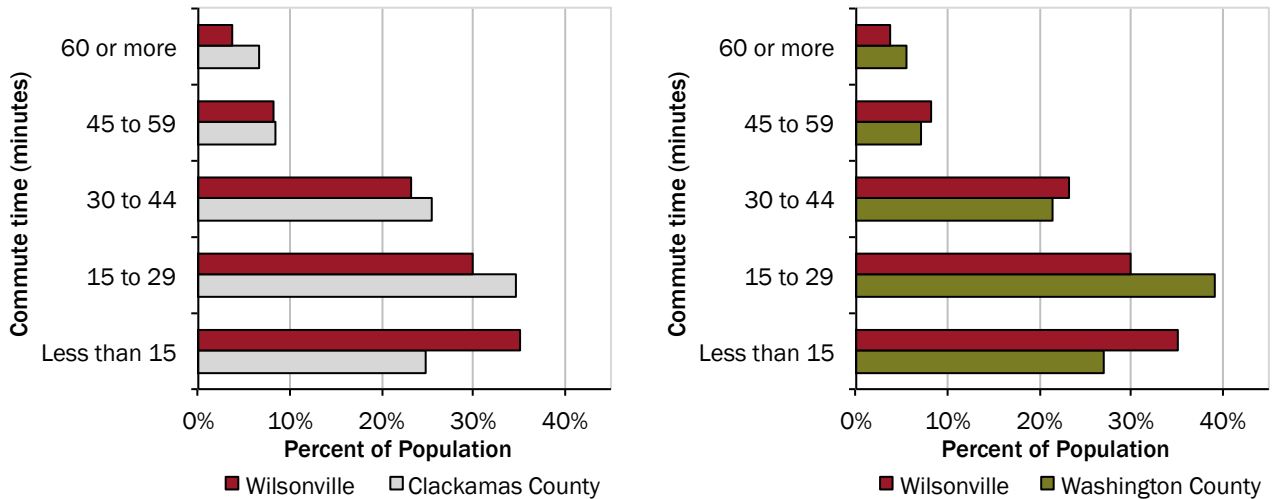
Source: American Community Survey 2007-2011 B08303

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[26] 2007-2011 American Community Survey, B08130

Key factors affecting housing choice

The preceding sections describe information about the key factors that affect housing choice for Wilsonville: population growth, age, household composition, and income. Figure 4-14 illustrates one example of the effect of housing life cycle based on demographic changes. Housing needs and preferences change in predictable ways over time, with changes in marital status and size of family. Families of different sizes need different types of housing.

Figure 4-14. Effect of demographic changes on housing need
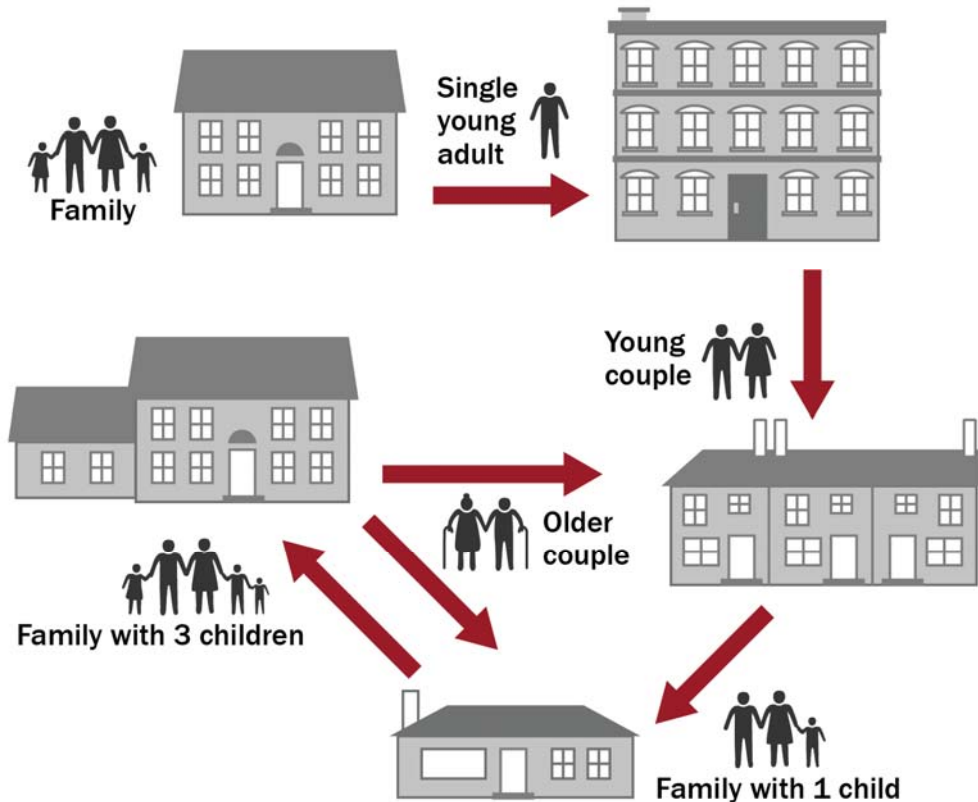
Source: ECONorthwest, adapted from Clark, Willam A.V. and Frans M. Dieleman. 1996. *Households and Housing*. New Brunswick, NJ: Center for Urban Policy Research.

Figures 4-2 through 4-7 show the relationships between age, household size, tenure characteristics, and income for Wilsonville and the Portland Region.

Figure 4-15 shows households by tenure and age of householder in the Portland Region and Wilsonville in 2010. Younger people typically have greater mobility and less income than people who are older. As a result, people in these age groups are more likely to be renters. Homeownership rates increase with the age until age 75, when homeownership rates begin to decrease.

The information in Figure 4-15 suggests that people over 65 prefer to continue being homeowners past traditional retirement ages in the Portland Region. In Wilsonville, homeownership rates decline from about 77% of households to 48% for households 75 years and older.

Figure 4-15. Households by tenure and age of householder, Portland Region and Wilsonville, 2010
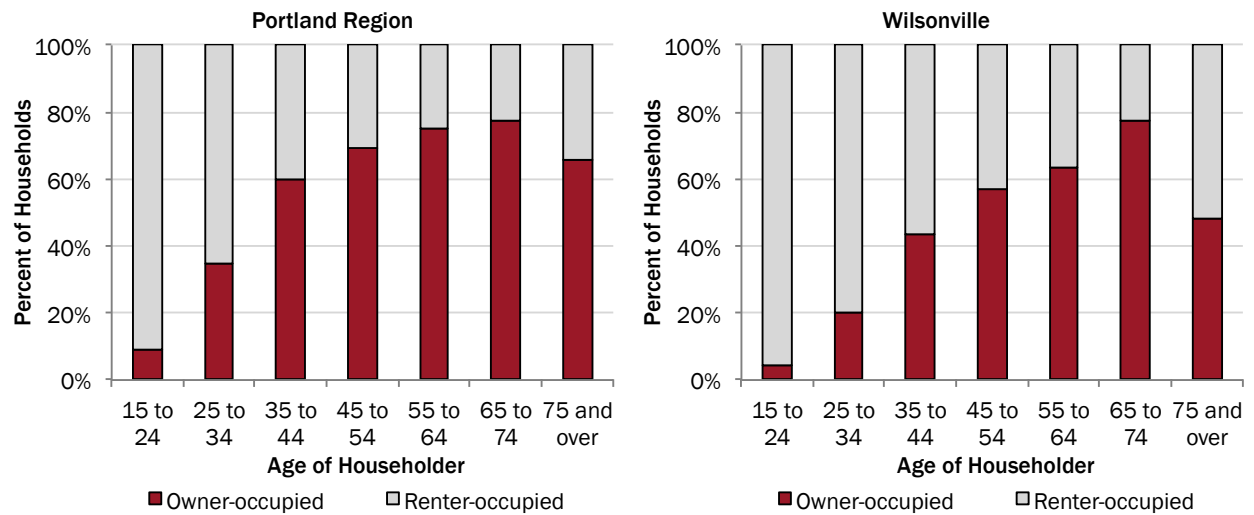
Source: US Census 2010 H17

Figure 4-16 shows that household income generally increases with household age until retirement, when it declines. In the Portland Region and Wilsonville, households headed by a person under 25 years old were more likely than other age groups to make less than $50,000 a year. Householders in the 45 to 64 age group were the most likely to make over $100,000 a year.

Figure 4-16. Households by income and age of householder
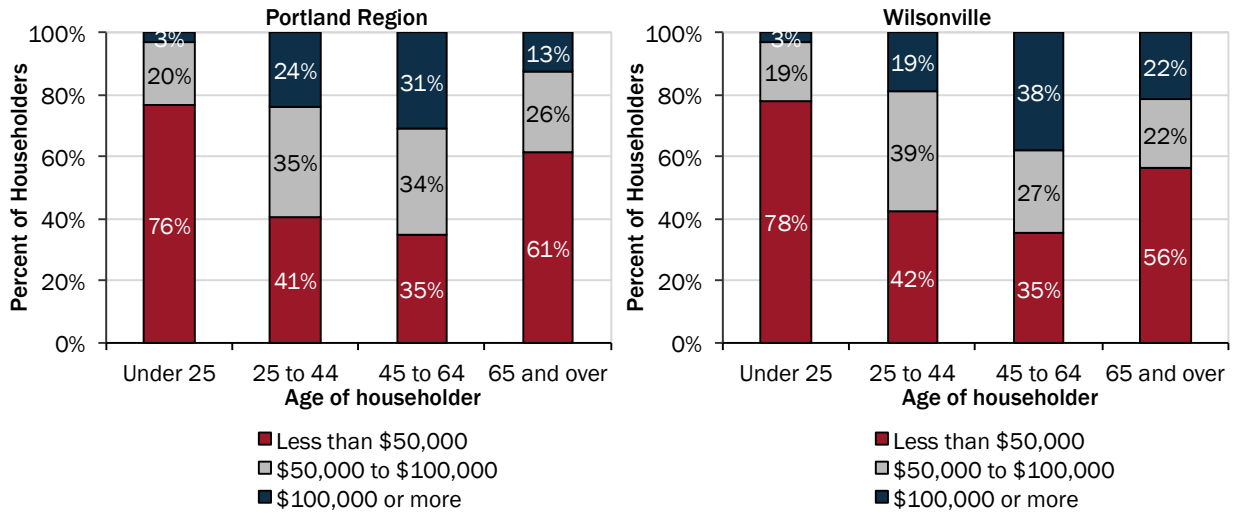
Source: 2007-2011 American Community Survey B19037

Figure 4-17 shows that householders age 54 and younger are most likely to live in households with two or more people. Householders 55 years and older are more likely to live in single-person households. More than three-quarters of householders age 75 years and older live in single-person households.

Figure 4-17. Households by household size and age of householder, Portland Region and Wilsonville, 2007-2011
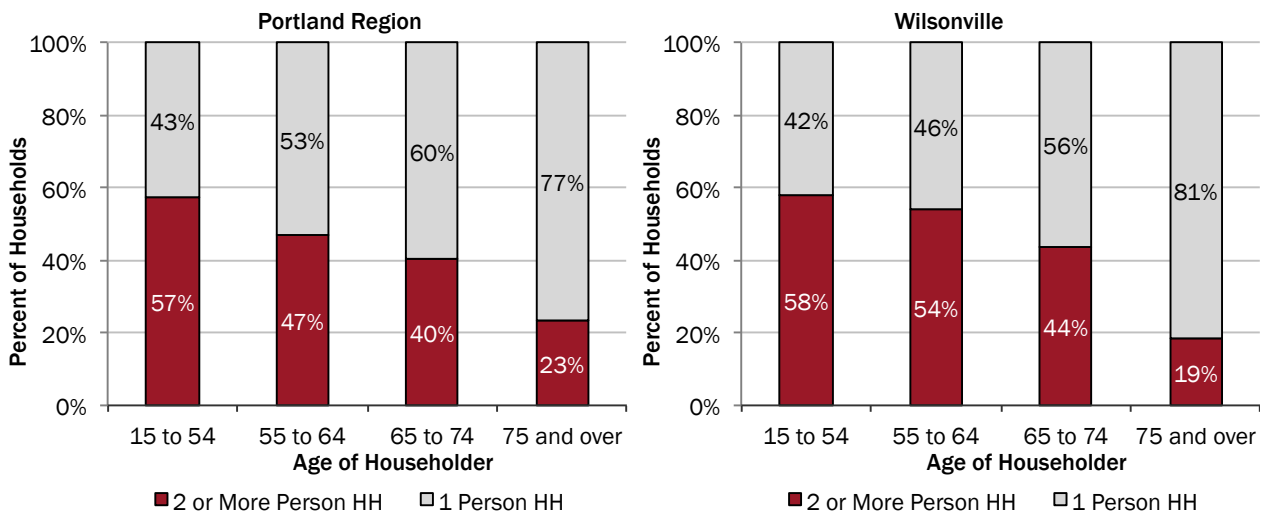
Source: American Community Survey 2007-2011 B25116

Figure 4-18 shows households by tenure, size, and age of householder in the Portland Region and Wilsonville. Figure 4-18 shows that the following information for both Wilsonville and the Portland Region:

- **Younger households were larger and more likely to be renters.** Householders 54 years and younger were more likely to live in households with 2 or more persons. In Wilsonville, more than 60% of these households were renters, compared to less than half of these households in the Portland Region.

- **Older households were likely to be homeowners.** Householders age 55 years and older were more likely to be homeowners.

- **Older households were smaller and more likely to be renters.** In Wilsonville, householders 75 years and older were more likely to be renters with one-person households than other age groups.

Figure 4-18. Households by household size, tenure, and age of householder, Portland Region and Wilsonville, 2007-2011
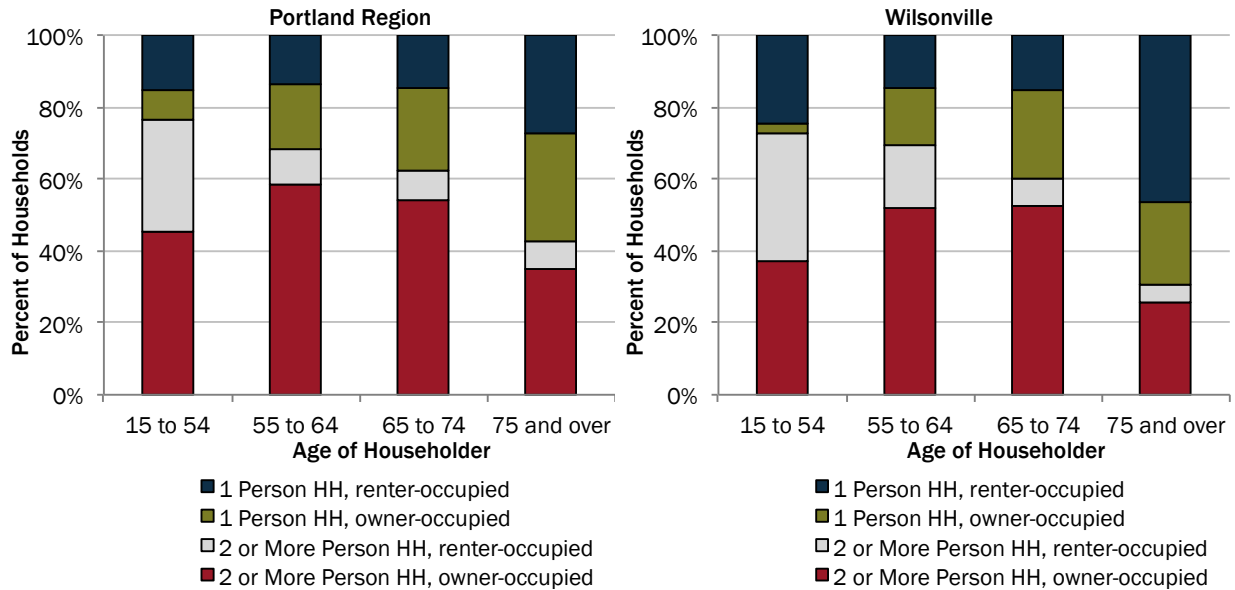
Source: American Community Survey 2007-2011 B25116

Figure 4-19 illustrates the relationship between age and housing type in the Portland Region and Wilsonville in 2007-2011. Younger householders are more likely to rent and renters are more likely to live in multifamily housing. Residence in single-family housing types is greatest for people ages 35 to 64. After age 65, the likelihood of owning a multifamily unit increases.

Figure 4-19 shows these general patterns but also shows that these patterns are not absolute. Residence in multifamily housing types was most common among householders aged 15 to 34. Householders between the ages of 35 and 64 were the most likely to live in single-family housing types.

Figure 4-19. Households by age of householder and housing type, Portland Region and Wilsonville, 2007-2011
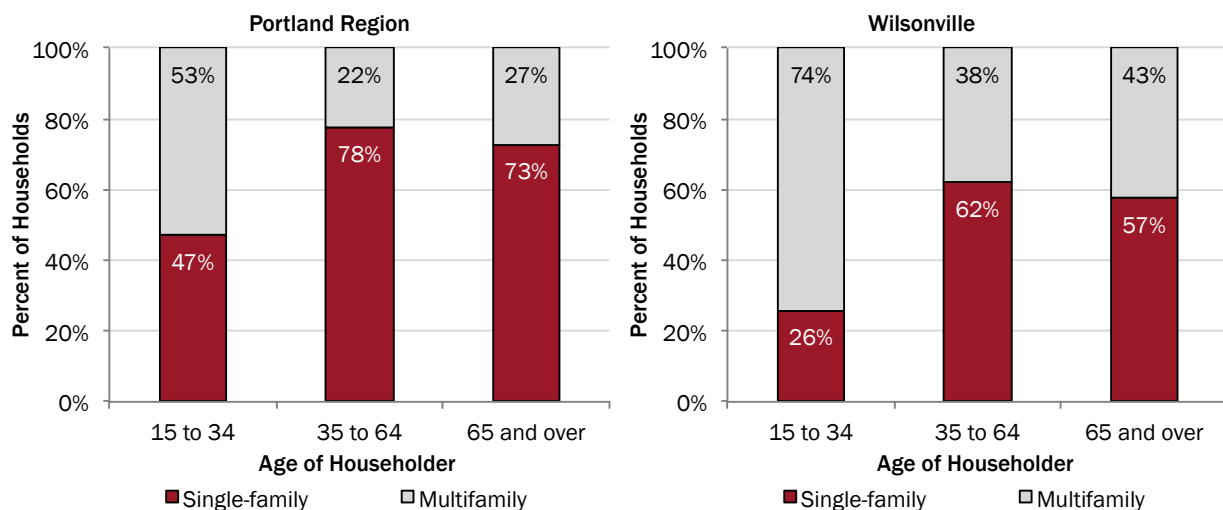
Source: American Community Survey 2007-2011 B25125

Figure 4-20 illustrates the relationship between household type and housing structure. Nonfamily households are more likely to live in multifamily housing types than families. In Wilsonville, three-quarters of married couple families lived in single-family housing types in 2007-2011, compared to 31% of nonfamily households.

Figure 4-20. Households by household type and structure, Portland Region and Wilsonville, 2007-2011
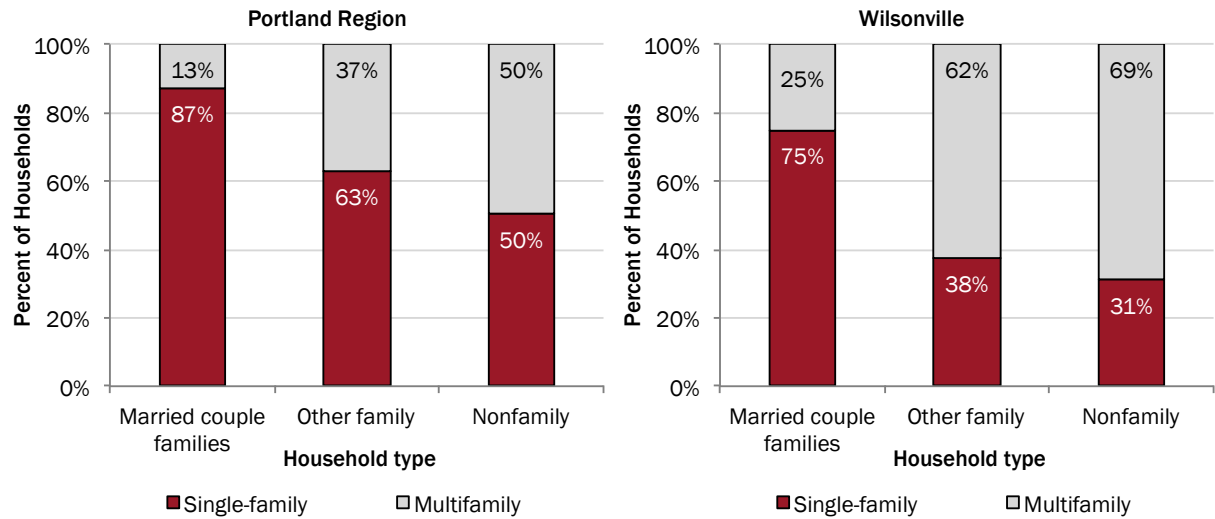
Source: American Community Survey 2007-2011 B11011

Figure 4-15 through Figure 4-20 illustrate that demographic relationships are helpful when estimating future housing demands because housing life cycle and housing choice interact in predictable ways. The age of the household head is related with household size and income, which affect housing preferences. Income affects the ability of a household to afford their preferred housing type.

Other trends potentially affecting regional housing choice

Metro's *Urban Growth Report 2009-2030 Employment and Residential* (January 2010) describes macro trends that may influence future housing preferences within the Portland metropolitan region. Those trends are summarized briefly below from the *Urban Growth Report*:

- **Climate change** may affect the region's precipitation, water storage, and hydroelectric generation. These changes have implications for sustainable population growth and housing demand within the region. For example, higher water prices could increase demand for smaller lots, which typically require less irrigation for landscaping. In addition, new government regulations of greenhouse gas emissions may affect housing or transportation costs, changing where households locate within the region. It is unclear how climate change will affect housing demand in the Portland Region over the 20-year planning period.

- **Lending practices** affect regional housing demand. One result of the recent housing market decline was changes in lending practices, which made borrowing for homeownership more difficult. If lending practices continue to limit borrowing opportunities, fewer households may be able to afford homeownership or may be forced to wait longer to become homeowners. It is unclear how lending practices will affect housing demand in the Portland Region over the 20-year planning period.

- **Growth in traffic congestion and increased costs of automotive fuel** may affect the locational preferences for households within the Portland Region. For example, households may choose to live closer to work, rather than commuting across the Region.

- **Infrastructure funding deficiencies** may result in increases in new housing costs through increases in local fees or charges for new residential development (e.g., increases in systems development charges). The result will be shifting infrastructure costs to homebuyers, which would favor development locations and patterns with lower infrastructure costs.

REGIONAL AND LOCAL TRENDS IN HOUSING COSTS AND AFFORDABILITY

Changes in housing costs

This section describes changes in housing values, sales prices, and rents in Wilsonville and the Portland Region since 2000.

Housing values

Table 4-8 shows change in median housing value in Washington County, Clackamas County, and selected cities for the 2000 to 2007-2011 period. Median housing prices increased by nearly 75% between 2000 and 2007-2011 in Wilsonville, from $213,600 in 2000 to $371,200 in 2007-2011. Washington County's median housing prices increased by almost $120,000 or 66% over the same period. In Clackamas County, median housing prices increased by $132,600 or 68% over the same period.

Wilsonville's median housing values were higher than 11 other cities in the Region but below housing values in West Linn, Happy Valley, and Lake Oswego.

Table 4-8. Median housing value, nominal dollars, owner-occupied housing units, Washington County, Clackamas County, and selected cities, 2000 to 2007-2011

	2000	2007-2011	Change 2000 to 2007-2011	
			Amount	Percent
Washington County	$180,400	$300,200	$119,800	66%
Clackamas County	$193,700	$326,300	$132,600	68%
Forest Grove	$144,800	$233,600	$88,800	61%
Milwaukie	$153,800	$243,200	$89,400	58%
Troutdale	$162,400	$245,300	$82,900	51%
Gladstone	$162,900	$252,200	$89,300	55%
Hillsboro	$163,200	$262,800	$99,600	61%
Oregon City	$161,900	$284,200	$122,300	76%
Portland	$154,700	$292,800	$138,100	89%
Beaverton	$186,100	$297,600	$111,500	60%
Sherwood	$181,500	$324,000	$142,500	79%
Tigard	$187,100	$324,000	$136,900	73%
Tualatin	$190,900	$335,800	$144,900	76%
Wilsonville	**$213,600**	**$371,200**	**$157,600**	**74%**
West Linn	$244,700	$406,700	$162,000	66%
Happy Valley	$302,800	$464,700	$161,900	53%
Lake Oswego	$286,900	$507,800	$220,900	77%

Source: U.S. Census 2000 SF3 H85, U.S. Census American Community Survey 2007-2011 B25077

Figure 4-21 shows a comparison of housing value for owner-occupied housing units in Wilsonville and Clackamas and Washington Counties for the 2007-2011 period. Wilsonville had a smaller percentage of housing valued less than $200,000 (10%) than Clackamas County (17%) or Washington County (16%). Wilsonville had a larger percentage of housing valued more than $400,000 (41%) than Clackamas County (33%) or Washington County (26%). In comparison, 27% of owner-occupied housing in the Portland Region was valued over $400,000 in 2007-2011.

Figure 4-21. Housing value, owner-occupied housing units, Wilsonville, Clackamas County, and Washington County, 2007-2011
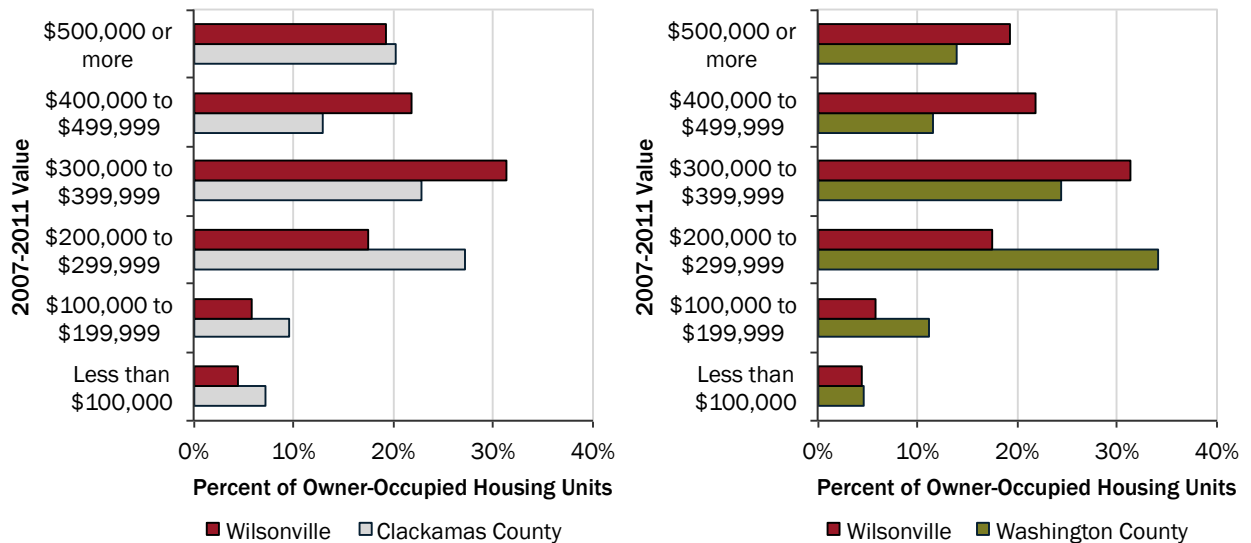
Source: American Community Survey, 2007-2011; Table B25075

Table 4-9 and Figure 4-22 show change in the average sales price by housing type for Wilsonville, based on sales recorded in the Metro Regional Land Information System for houses sold in 2000, 2007, and 2012. Table 4-9 shows that single-family prices increased substantially in Wilsonville between 2000 and 2007 and declined between 2007 and 2012. These changes are consistent with county and Regional trends.

Despite the substantial decrease in sales price between 2007 and 2012, sales prices for single-family dwellings increased (in nominal dollars) over the 13-year period. Between 2000 and 2012, average sales prices in Wilsonville increased by $75,000 (31%) and median sales prices increased by $58,000 (25%). In comparison, average sales prices in the Portland Region and Washington County increased by 54% and 36% in Clackamas County.

Table 4-9. Average sales and median price, single family, nominal dollars, Portland Region, Washington County, Clackamas County, and Wilsonville, 2000, 2007, and 2012

	2000	2007	2012	Change 2000 to 2012		Change 2007 to 2012	
				Amount	Percent	Amount	Percent
Average Sales Price							
Portland Region	$200,580	$354,705	$308,125	$107,545	54%	-$46,580	-13%
Washington County	$208,131	$362,249	$321,045	$112,914	54%	-$41,205	-11%
Clackamas County	$227,445	$394,907	$308,691	$81,246	36%	-$86,216	-22%
Wilsonville	$242,800	$473,268	$318,107	$75,306	31%	-$155,162	-33%
Median Sales Price							
Portland Region	$169,500	$299,900	$244,590	$75,090	44%	-$55,310	-18%
Wilsonville	$232,000	$421,500	$290,000	$58,000	25%	-$131,500	-31%

Source: Metro Regional Land Information System, May 2013 release
Note: This table only includes sales of single-family units with a sales price of $10,000 or more

Figure 4-22. Average sales, single family, Portland Region, Washington County, Clackamas County, and Wilsonville, 2000, 2007, and 2012
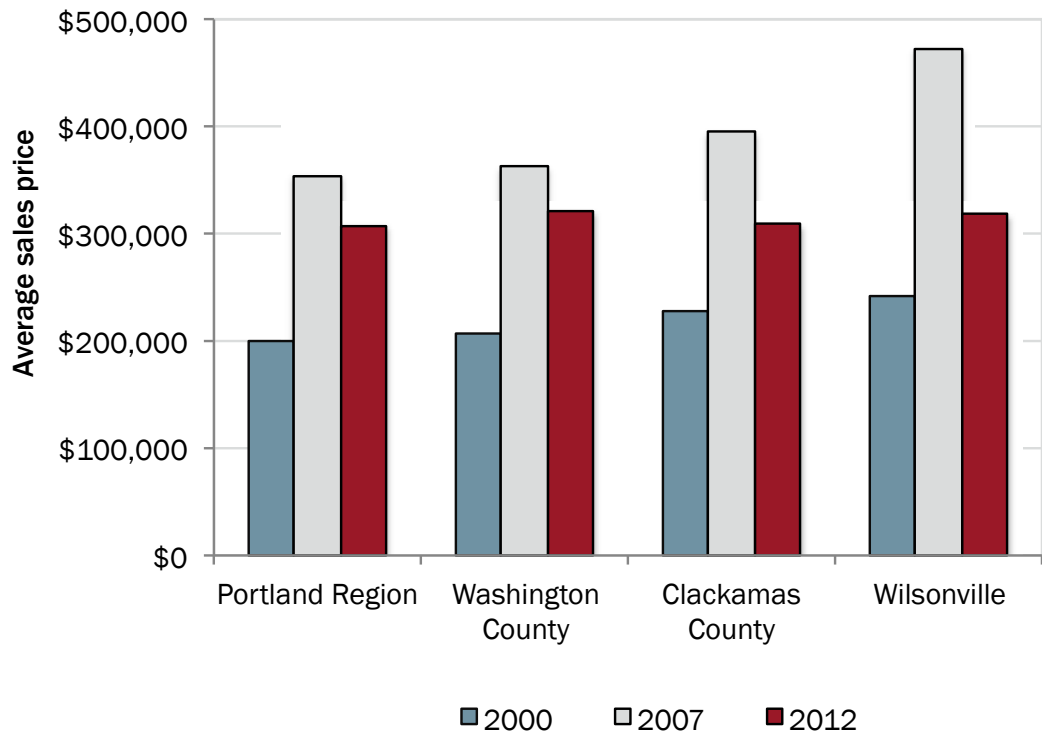
Source: Metro Regional Land Information System, May 2013 release
Note: This table only includes sales of single-family units with a sales price of $10,000 or more

Figure 4-23 shows average sales prices for single-family dwellings in selected cities within the Portland Region. The average sales price in the Region in 2012 was $308,000. Wilsonville's average sales price ($318,100) higher than 10 other cities in the region but below four cities with higher average sales prices.

Figure 4-23. Average single-family unit sales, Portland Region and selected cities, 2012
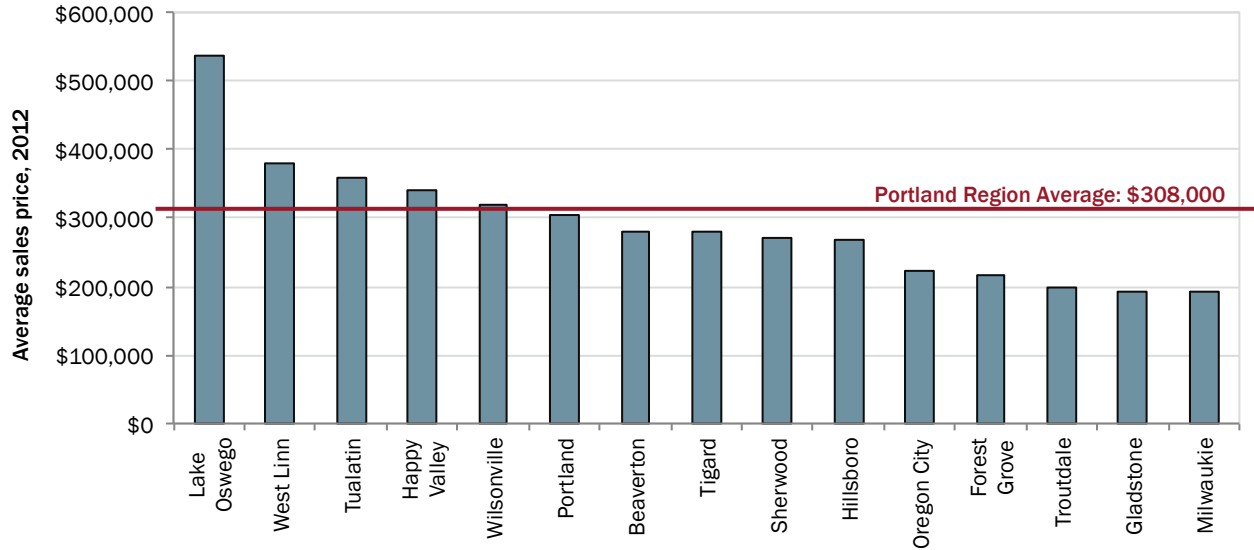
Source: Metro Regional Land Information System, May 2013 release
Note: This table only includes sales of single-family units with a sales price of $10,000 or more

Housing rental costs

Table 4-10 shows that the median contract rent in Wilsonville was $792, similar to Clackamas County's ($790) and lower than in Washington County ($808).

Table 4-10. Median contract rent, 2007-2011

Location	Rent
Portland Region	$752 - $808
Washington County	$808
Clackamas County	$790
Wilsonville	$792

Source: U.S. American Community Survey 2007-2011 B25058

Figure 4-24 shows average rent per square foot for apartments in the Portland/Vancouver Metro region and selected submarkets, according to Multifamily NW data between 2010 and 2013. Average rent in the Wilsonville/Canby submarket was $0.94 per square foot in Spring 2013, lower than the regional average of $1.04 per square foot. Between Spring 2010 and Spring 2013, average rent in Wilsonville/Canby increased by 13%. Between 2010 and 2013, average rent prices in Wilsonville/Canby were most similar to Beaverton and Tigard/Tualatin/Sherwood.

Figure 4-24. Average rent per square foot, Portland/Vancouver Metro and selected submarkets, 2010-2013
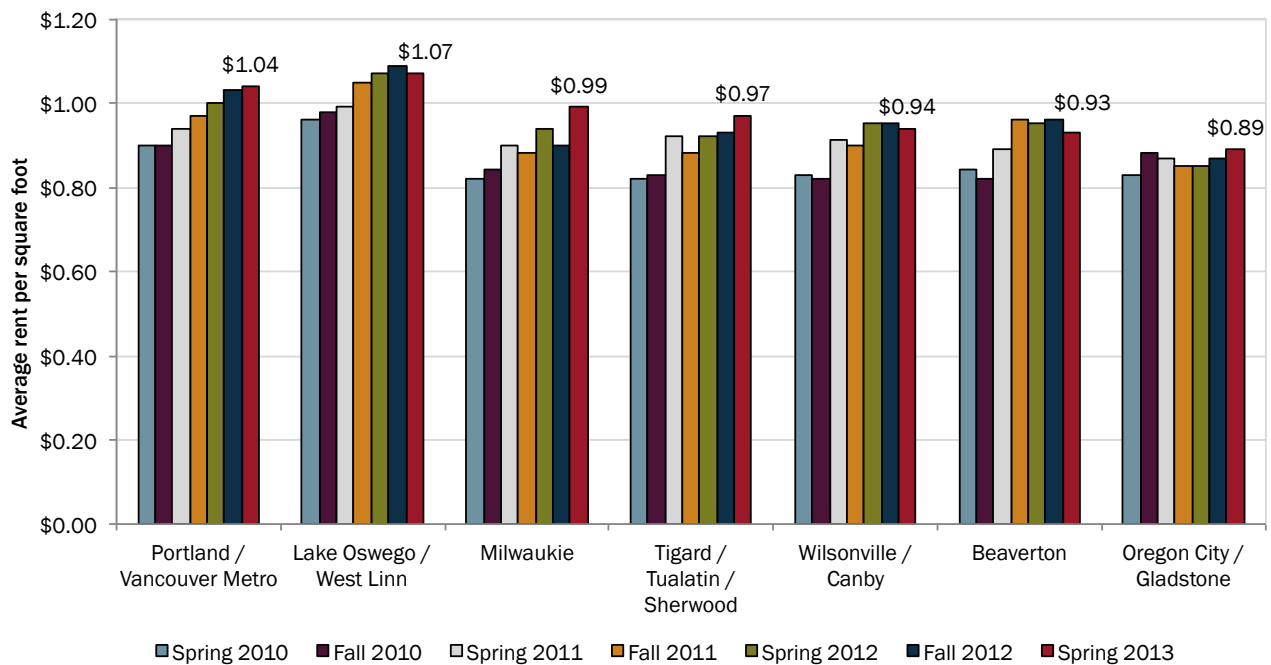
Source: Multifamily NW Apartment Reports, Spring 2010 through Spring 2013.
Note: The average rent price shown on the graph is for Spring 2013

Implication of changes in housing costs for housing affordability

The implication of the information about housing costs and income is that ownership costs increased much faster than rents and incomes, even given the decline in housing sales prices since 2007.

Table 4-11 underscores this trend for Wilsonville. Between 2000 and 2007-2011, incomes increased about 5% while the median value of an owner-occupied home increased 74% and rents increased 22%. The data show that the median owner value was 4.3 times median household income in 2000—a figure that increased to 6.7 in 2007-2011. This trend is consistent with decreases in the affordability of homeownership across the Portland Region and in most U.S. metropolitan areas.

For comparison, the ratio of income to housing value increased from 3.5 in 2000 to 4.4 in 2011 Washington County. In Clackamas County, the ratio of income to housing value increased from 4.7 in 2000 to 5.1 in 2011. The data show that homeownership became less affordable between 2000 and 2011 in both counties but that homeownership was less affordable in Clackamas County.

Table 4-11. Comparison of income, housing value, and gross rent, nominal dollars, Wilsonville, 2000 and 2007-2011

Indicator	2000	2007-2011	Change
Median HH Income	$52,515	$55,316	5%
Median Owner Value	$213,600	$371,200	74%
Median Gross Rent	$746	$912	22%
Ratio of Housing Value to Income			
Median HH Income	4.1	6.7	

Source: U.S. Census 2000 SF1 P53, SF3 H63 H85, American Community Survey 2007-2011 B19013 B25064 B25077
Note: Data for 2007-2011 are inflation adjusted to 2011 dollars.

Housing affordability

Housing affordability is an important issue for Metro and the Portland Region. "Affordable Housing Needs Study for the Portland Metropolitan Area" provided a comprehensive analysis of future affordable housing needs of the Metro region for the 2005 to 2035 period, based on household and demographic data from the *Metroscope* model.[27] The study made the following conclusions and recommendations:

- Cost burden will increase from 43% of households in 2005 to 48.6% of households in the Metro region in 2035. Cost burden in Wilsonville and unincorporated Clackamas County will decrease from 24.2% of households in 2005 to 16.6% of households in 2035.

- Cost burden will be greatest among renters, increasing from 51.5% in 2005 to 57.2% in 2035 region-wide. Cost burden will increase for renters in Wilsonville and unincorporated Clackamas County from 42.0% in 2005 to 50.4% in 2035.

- The households most affected by increased cost burden will be single-person households (under 25 years and over 65 years old) and working class households, especially single-parent families with children.

- Single-family rental units (detached and attached) will become less available over time. The groups most likely to rent single-family units, low-income families, will increasingly depend on multifamily units.

Cost burden

The percentage of income relative to the total amount a household spends on housing is referred to as cost burden. Total housing expenses are generally defined to include payments and interest or rent, utilities, and insurance. HUD guidelines indicate that households paying more than 30% of their income on housing experience "cost burden" and households paying more than 50% of their income on housing experience "severe cost burden." Using cost burden as an indicator is consistent with the Goal 10 requirement of providing housing that is affordable to all households in a community.

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[27] Institute of Portland Metropolitan Studies, "Affordable Housing Needs Study for the Portland Metropolitan Area", draft final report, November 20, 2007.

Figure 4-25 show that the percentage of Wilsonville households who were cost burdened was similar to the average for the Portland Region. Figure 4-26 shows that cost burden among fifteen cities in the Region ranged from 45% of households (Oregon City) to 38% (Hillsboro). The percent of Wilsonville households that were cost burdened fell approximately in the middle.

Figure 4-25. Cost burden among all households, Portland Region, Washington County, Clackamas County, and Wilsonville, 2007-2011
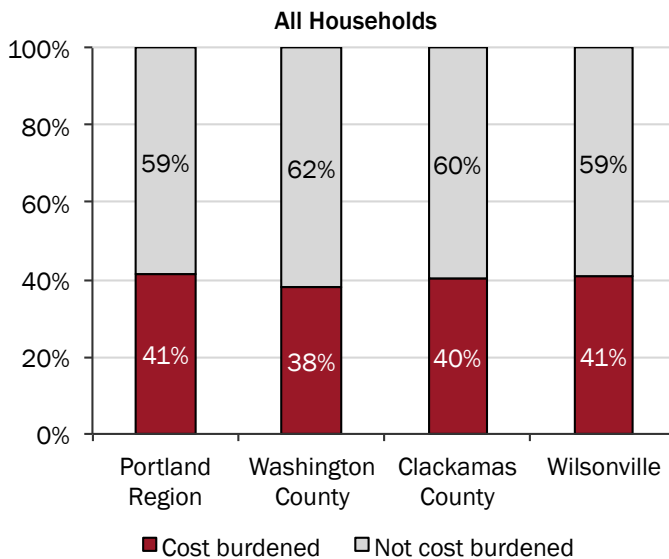
Source: American Community Survey 2007-2011, B25091, B25070

Figure 4-26. Cost burden among all households, selected cities in the Portland UGB, 2007-2011
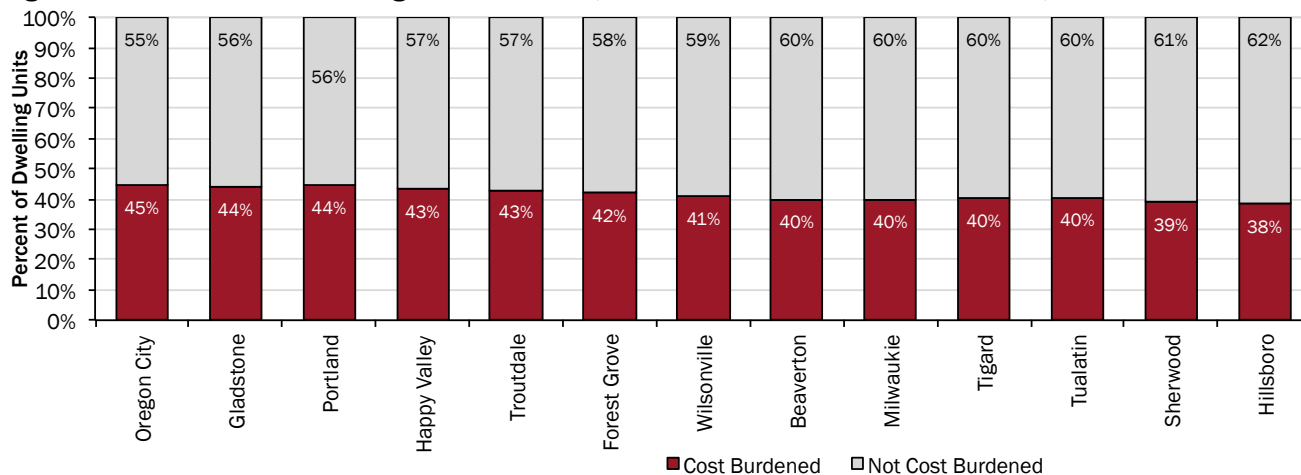
Source: American Community Survey 2007-2011, B25091

Figure 4-27 shows cost burden for owner households and renter households. The rate of cost burden was much higher for renters (48%) than for homeowners (31%) in Wilsonville.

Figure 4-27. Cost burden among owner households and renter households, Portland Region, Washington County, Clackamas County, and Wilsonville, 2007-2011
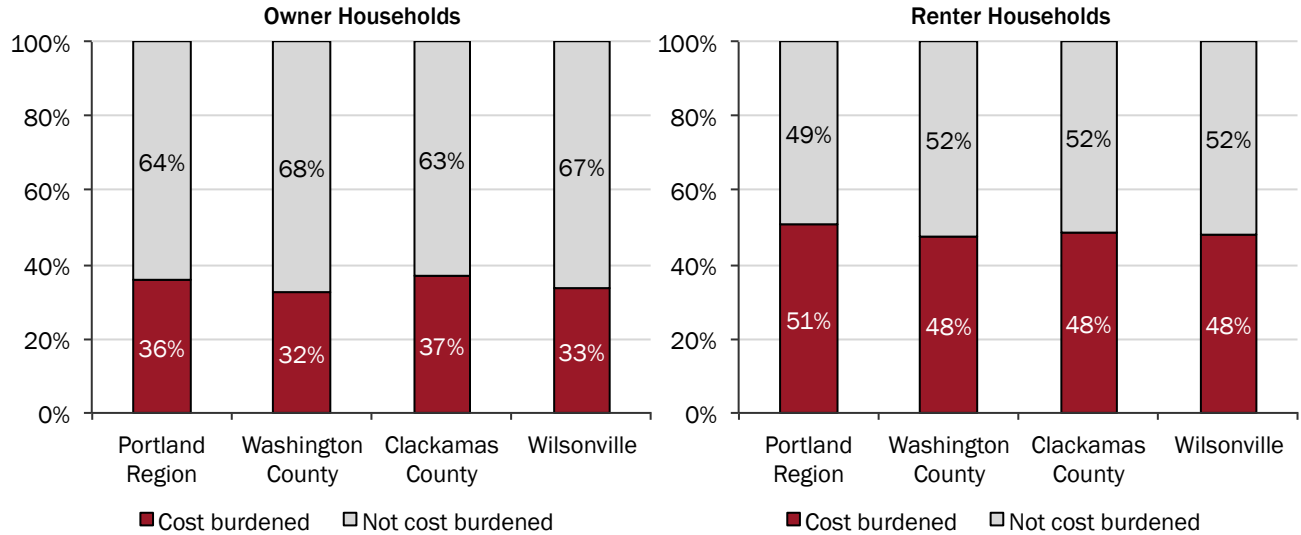
Source: American Community Survey 2007-2011, B25091, B25070

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 income 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 accumulated wealth on a household's ability to pay for housing. For example, a household with 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.

Cost burden describes the amount that a household pays for shelter. Households have other necessary expenses, such as food, transportation, clothing, utilities, health care, other necessities, as well as optional expenses, such as recreation. Cost burden decreases the amount of income available to pay for necessary

expense. The cost of necessities varies throughout Oregon and affects a household's ability to live in a given city.

Estimates of housing affordability

Table 4-5 presents information about median household income in Wilsonville, Clackamas County, and Washington County. This section presents information about housing affordability in Wilsonville, Clackamas County, and Washington County in the context of the broader region.

One way of exploring the issue of financial need is to review wage rates together with measures of housing affordability. Table 4-12 shows an analysis of affordable housing wage and rent gap for households in Clackamas County at different percentages of median family income (MFI). The data are for a typical family of four.

The results indicate that a household must earn $17.07 an hour to afford a two-bedroom unit according to HUD's market rate rent estimate of $891 per month. Households earning minimum wage or 30% of MFI are unable to afford a two-bedroom unit at HUD's Fair Market Rent.

Table 4-12. Analysis of affordable housing wage and rent gap by HUD income categories, Clackamas County, 2012

Value	Minimum Wage	30% MFI	50% MFI	80% MFI	100% MFI	120% MFI
Annual Hours	2088	2088	2088	2088	2088	2088
Derived Hourly Wage	$8.80	$10.49	$17.48	$27.97	$34.96	$41.95
Annual Wage At Minimum Wage	$18,374	$21,900	$36,500	$58,400	$73,000	$87,600
Annual Affordable Rent	$5,512	$6,570	$10,950	$17,520	$21,900	$26,280
Monthly Affordable Rent	$459	$548	$913	$1,460	$1,825	$2,190
HUD Fair Market Rent (2 Bedroom)	$891	$891	$891	$891	$891	$891
Is HUD Fair Market Rent Higher Than The Monthly Affordable Rent?	Yes	Yes	Yes	No	No	No
Rent Paid Monthly OVER 30% of Income	$432	$344	na	na	na	na
Rent Paid Annually OVER 30% of Income	$5,180	$4,122	na	na	na	na
Percentage of Income Paid OVER 30% of Income for Rent	28%	19%	na	na	na	na
Total Spent on Housing	58%	49%	29%	18%	15%	12%
For this area what would the "Affordable Housing Wage" be?	$17.07	$17.07	$17.07	$17.07	$17.07	$17.07
The Affordable Housing Wage Gap IS:	**$8.27**	**$6.58**	**na**	**na**	**na**	**na**

Source: HUD, analysis by ECONorthwest.
Notes: MFI is Median family income. Oregon minimum wage in 2012 was $8.80.

Table 4-13 shows a rough estimate of affordable housing cost and units by income levels for Wilsonville in 2012. When interpreting this data, keep in mind:

- The affordability guidelines are based on median family income (determined by HUD) and provide a rough estimate of financial need but may mask other barriers to affordable housing such as move-in costs, competition for housing from higher income households, and availability of suitable units. They also ignore other important factors such as accumulated assets, real estate purchased as investment, and the effect of down payments and interest rates on housing affordability.

- Households compete for housing in the marketplace. In other words, affordable housing units are not necessarily available to low income households. For example, if an area has a total of 50 dwelling units that are affordable to households earning 30% of median family income, half of those units may already be occupied by households that earn more than 30% of median family income.

The data in Table 4-13 indicate that in 2012:

- About 20% of Wilsonville's households could not afford a studio apartment according to HUD's estimate of $665 fair market rent.

- About 30% of Wilsonville's households could not afford a two-bedroom apartment according to HUD's estimate of $891 fair market rent.

- A household earning a median family income ($73,000) could afford a home valued up to $182,500.

Table 4-13. Rough estimate of housing affordability, Wilsonville, 2012

Income Level	Number of HH	Percent	Affordable Monthly Housing Cost	Crude Estimate of Affordable Purchase Owner-Occupied Unit	Est. Number of Owner Units	Est. Number of Renter Units	Surplus (Deficit)	HUD Fair Market Rent (FMR) in 2012
Less than $10,000	669	9%	$0 to $250	$0 to $25,000	81	46	(543)	
$10,000 to $14,999	259	3%	$250 to $375	$25,000 to $37,000	36	22	(201)	
$15,000 to $24,999	623	8%	$375 to $625	$37,500 to $62,500	49	105	(469)	
$25,000 to $34,999	717	10%	$625 to $875	$62,500 to $87,500	0	1,459	742	Studio: $665 1 bdrm: $771
$35,000 to $49,999	1,163	15%	$875 to $1,250	$87,500 to $125,000	30	1,472	339	2 bdrm: $891
$50,000 to $74,999	1,264	17%	$1,250 to $1,875	$125,000 to $187,500	147	477	(640)	3 bdrm: $1,297 4 bdrm: $1,558
Clackamas County 2012 MFI: $73,000			$1,825	$182,500				
$75,000 to $99,999	983	13%	$1,875 to $2,450	$187,500 to $245,000	309	138	(536)	
$100,000 to $149,999	1,122	15%	$2,450 to $3,750	$245,000 to $375,000	1,277	37	192	
$150,000 or more	734	10%	More than $3,750	More than $375,000	1,839	12	1,117	
Total	7,534	100%			3,767	3,767	0	

Source: American Community Survey, U.S. Census, 2010, U.S. Department of Housing and Urban Development, and Oregon Housing & Community Services. Notes FMR- Fair Market Rent and MFI – Median Family Income

As a final step in the housing affordability analysis, ECONorthwest performed a rough correlation of income with needed housing types as defined by ORS 195.303. This analysis is also consistent with guidance provided in the DLCD Planning for Residential Lands Workbook.[28] Table 4-14 shows ECONorthwest's evaluation for market segments, incomes, and financially attainable housing products. The tables use the 2012 HUD income guidelines as the market segments and the most recent American Community Survey data from the Census for the income distribution.

Table 4-14 provides an estimate of financially attainable housing types by income and tenure for Wilsonville households. The data shown in Table 4-14 suggest that Wilsonville has an existing need for about 2,364 housing units that are affordable for households with income less than $36,500.

Table 4-14. Financially attainable housing type by income range, Wilsonville, 2007-2011

Market Segment by Income	Income Range	Number of households	Percent of Households	Financially Attainable Products	
				Owner-occupied	Renter-occupied
High (120% or more of MFI)	$87,600 or more	2348	31%	All housing types; higher prices	All housing types; higher prices
Upper Middle (80%-120% of MFI)	$58,400 to $87,600	1210	16%	All housing types; lower values	All housing types; lower values
Lower Middle (50%-80% of MFI)	$36,500 to $58,400	1613	22%	Single-family attached; condominiums; duplexes; manufactured on lots	Single-family attached; detached; manufactured on lots; apartments
Lower (30%-50% of less of MFI)	$21,900 to $36,500	907	12%	Manufactured in parks	Apartments; manufactured in parks; duplexes
Very Low (Less than 30% of MFI)	Less than $21,900	1457	19%	None	Apartments; new and used government assisted housing

Source: Estimates by ECONorthwest based on HUD 2012 Median Family Income for Clackamas County and 2007-2011 American Community Survey for Wilsonville income data.

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[28] Specifically, Step 4, page 29 and the figure on page C-11.

Summary of government subsidized housing in Wilsonville

There are a number of government subsidized affordable housing programs in Clackamas County and Wilsonville that are designed to address the housing affordability problems described above. Governmental agencies and nonprofit organizations offer a range of housing assistance to low- and moderate-income households in renting or purchasing a home include:

- **Housing Choice Voucher program** (formerly known as Section 8) allows very low-income families (including elderly and disabled) to choose where they want to live by providing rental certificates that limit tenants' rent to 30% of their monthly income.

- **Public housing** is government-provided low cost housing in multi-unit complexes that are available to low-income, mostly elderly or disabled, residents. Managed by local housing authorities, they typically require tenants to pay no more than 30% of their monthly income for rent.

- **HUD landlord subsidies** give funds directly to apartment owners, who lower the rents they charge low-income tenants.

- **Section 202** provides housing for low-income senior citizens and often includes services such as meals, transportation, and accommodations for the disabled.

- **Subsidized mortgage programs** are state-sponsored programs that reduce the interest rate for homes purchased within the state to qualified low-income first-time homebuyers. Other programs that offer low interest rate loans include:

  - **Veteran's Affairs loans** are home loans offered to eligible veterans, some military personnel, and certain surviving spouses.
  - **Other homeownership assistance** include a variety of down payment assistance programs run by states, counties, cities, business organizations, and non-profit organizations for low-income families.

Nonprofit organizations also provide a wide variety of housing assistance to low-income households and individuals. Nonprofits provide assistance with renting or purchasing housing, as well as services (such as emergency food, low-cost medical services, or transportation assistance).

The City of Wilsonville has a variety of publicly and privately assisted housing options, including housing for people with physical and mental disabilities. The Housing Authority of Clackamas County (HACC) is the public housing authority for Wilsonville and Clackamas County, and HACC administers the Housing Choice Voucher program for the county. As of 2013, HACC provided 1,493 Housing Choice vouchers to households throughout Clackamas County.

As of May 2013, the waiting list for the Housing Choice Voucher program was closed, and HACC estimated that the waiting list was seven years or longer.

Table 4-15 shows affordable housing developments existing within Wilsonville in 2013. Wilsonville has seven low cost apartment complexes for low-income residents, with a total of 474 units. The units are a mixture of 1-, 2-, and 3-bedroom units. While some developments have low or no vacancies, some developments have available units.

Table 4-15. Low cost apartment complexes, Wilsonville, 2013

Name of development	Number of units	Population segment served
Autumn Park Apartments	144	Low-income families, seniors, people with disabilities
Charleston Apartments	51	Low-income households
Creekside Woods	84	Low-income seniors
Montebello Apartments	84	Low-income families, seniors, people with disabilities
Rain Garden Apartments	29	Low-income people needing health and supportive services
Wiedmann Apartments	58	Low-income seniors
Wilsonville Heights Apartments	24	Low-income families, seniors, people with disabilities

Source: ECONorthwest

The City of Wilsonville supports the development and operations of affordable housing through exempting low-income housing from property taxes. Five of the seven apartment complexes in Table 4-15 were exempted from property taxes in 2013. The City estimates the tax exemptions will lower rent at these five complexes by a total of $277,000 over a twelve-month period.[29]

Other regional or countywide efforts to address housing affordability issues include:

- **Clackamas County Ten-Year Plan and Policy to Address Homelessness** is a 2007 report published by the Clackamas County Coordinating Council for Homeless Programs. The plan describes Clackamas County's housing affordability problems and proposes action steps to end homelessness in Clackamas County. These action steps go beyond issues that can be addressed through land use planning, including expansion of mental health services, de-criminalization of homelessness, and increased support services for homeless children.

  The actions steps that are directly related to residential land use policies include: (1) preservation and expansion of affordable housing stock and (2) adoption of housing policies that encourage the development of affordable housing, such as through property tax exemptions, foreclosure regulations, or mobile home park protection.

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[29] Wilsonville City Council Meeting Staff Report, April 15, 2013.

- **Northwest Housing Alternatives** (NHA) is a non-profit that builds and renovates affordable housing in 17 Oregon counties, including Clackamas County. NHA has helped develop three apartment complexes in Wilsonville: Autumn Park Apartments, Creekside Woods (a seniors-only facility), and The Charleston.

- **Proud Ground** is a non-profit community land trust committed to providing affordable homeownership opportunities for people in Clackamas, Washington and Multnomah Counties. Proud Ground subsidizes the purchase price of homes for qualifying first-time homeowners, and participants agree to resale provisions that ensure that the home will remain affordable for the next homebuyer.

Chapter 5. Housing Need in Wilsonville

This chapter presents the analysis of housing needs in Wilsonville over the 2014 to 2034 period. It uses population growth assumptions combined with other assumptions (e.g., household size and vacancy rates) to estimate the total number of needed units (what Goal 10 calls the "Housing Needs Projection"). It then provides estimates of needed units by structure type and by density range.

Chapter 2 described the framework for conducting a housing "needs" analysis. The specific steps in conducting a housing needs analysis are:

1. Project 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, 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. Estimate the number of additional needed units by structure type.

6. Determine the needed density ranges for each plan designation and the average needed net density for all structure types.

This chapter focuses on Steps 1, 4, 5, and 6, based on the framework described in Chapter 2 and the information presented in Chapters 3 and 4.

SUMMARY OF WILSONVILLE'S HOUSING NEEDS

- Metro forecasts that Wilsonville will grow by 3,749 dwelling units over the 2014 to 2034 period. Metro's forecast results in 1.8% average annual growth. In comparison, Wilsonville average annual population growth between 1990 and 2012 was nearly 5% and 3.2% between 2000 and 2012.

- Wilsonville's assumed housing mix meets the requirement of OAR 660-007-0030 to "designate sufficient buildable land to provide the opportunity for at least 50 percent of new residential units to be attached single family housing or multiple family housing."

- Wilsonville's housing need projection (e.g., needed mix of housing) is for: 50% single-family detached (1,875 dwelling units), 10% single-family attached (375 dwelling units), and 40% multifamily housing (1,499 dwelling units).

- Wilsonville's assumed average housing density is 7.1 dwelling units per *gross* acre, which is an average of about 8.7 dwelling units per *net* acre.

- Wilsonville's assumed average density of 8.7 dwelling units per net acre meets the requirements of OAR 660-007-0035 to "provide for an overall density of eight or more dwelling units per net buildable acre".

- The assumptions used to determine Wilsonville's needed housing mix and density were discussed with Wilsonville decision makers and are based, in part, on the results of the capacity analysis for Wilsonville's residential land base, presented in Chapter 6.

PROJECT NEW HOUSING UNITS NEEDED IN THE NEXT 20 YEARS

The results of the housing needs analysis are based on: (1) the Metro forecast for new dwelling units in Wilsonville over the 20-year planning period, (2) information about Wilsonville's housing market relative to the Portland Region, (3) the demographic composition of Wilsonville's existing population and expected long-term changes in the demographics of the Portland Region, and (4) input from discussions with the Planning Commission and City Council.

Metro's forecast for household growth

The housing needs analysis in this chapter is based on a coordinated population forecast from Metro (the November 2012 "Gamma" forecast), which is a necessary prerequisite to estimate housing needs. The projection of

household growth includes areas currently within the city limits, as well as areas currently outside the city limits that the City expects to annex for residential uses (most notably Frog Pond). We call these areas combined the "Wilsonville planning area."[30]

Table 5-1 presents Metro's forecast for population growth and new housing development in the Wilsonville planning area for the 2010 to 2035 period. The table shows Metro's forecast for the Wilsonville city limits, areas currently outside the city limits that are expected to be annexed by 2035, which are together the Wilsonville planning area. Table 5-1 shows Metro's forecast for the number of households in each of the following years:

- **2010.** Metro's forecast uses an estimate of the number of households in 2010 as the starting point of the forecast.

- **2025.** As part of the forecasting process, Metro developed a forecast of households for 2025 to allow jurisdictions an opportunity to review and comment on the forecast for growth between 2010 and 2025.

- **2035.** Metro's forecast estimates household growth of 57% by 2035. Part of the forecasting process was providing jurisdictions an opportunity to review and comment on the forecast for growth through 2035.

Table 5-1. Metro forecast for housing growth, Wilsonville planning area, 2010 to 2035

Year	Wilsonville City Limits	Areas Currently Outside City Limits	Wilsonville Planning Area
2010	7,980	47	8,027
2025	10,944	753	11,697
2035	11,508	1,063	12,571
Change 2010 to 2035			
Households	3,528	1,016	4,544
Percent	44%	2162%	57%
AAGR	1.5%	13.3%	1.8%

Source: Metro Gamma Forecast, November 2012
Note: The Wilsonville City Limits are the following Metro Transportation Analysis Zones (TAZs): 965, 966, 967, 968, 969, 970, 971, 974, 975, 978, and 979
The "areas currently outside city limits" are TAZ 973 and 976, which are areas that the City plans to annex by 2035 with residential growth.

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[30] Metro forecasts household growth by Transportation Analysis Zone (TAZ) areas. The Wilsonville planning area includes TAZs within the city limits (TAZs: 965, 966, 967, 968, 969, 970, 971, 974, 975, 978, and 979) and areas currently outside the city limits that are expected to be annexed by 2035 (TAZ 973 and 976).

Wilsonville's housing needs analysis must be based on a 20-year period but Metro's forecast describes growth over a 25-year period. Table 5-2 shows an extrapolation of Metro's forecast for the 2014 to 2034 period. ECONorthwest extrapolated Metro's forecast (Table 5-1) using the following assumptions:

- **Households in 2014.** ECONorthwest estimated the number of households in the Wilsonville planning area using the number of households in 2010 and the growth rate in the forecast between 2010 and 2025.

  For example, in 2010 Metro estimated that there were 7,980 households within the Wilsonville city limits and would be 10,944 households in 2025. Between 2010 and 2025, the average annual growth rate for households within the city limits was 2.13%. Assuming that household growth in Wilsonville was 2.13% per year, there would be 8,682 households in Wilsonville in 2014.

- **Households in 2034.** ECONorthwest estimated the number of households in the Wilsonville planning area using the number of households in 2025 and the growth rate in the forecast between 2025 and 2035.

  For example, in 2025 Metro estimates that there would be 10,944 households within the Wilsonville city limits and would be 11,508 households in 2035. Between 2025 and 2035, the average annual growth rate for households within the city limits was 0.50%. Assuming that household growth in Wilsonville was 0.50% per year, there would be 11,451 households in Wilsonville in 2034.

Table 5-2 shows that the Wilsonville planning area will add 3,749 new households between 2014 and 2034, with 2,769 new households inside the existing city limits and 980 new households in outside the current city limits.

Table 5-2. Extrapolated Metro forecast for housing growth, Wilsonville planning area, 2014 to 2034

Year	Wilsonville City Limits	Areas Currently Outside City Limits	Wilsonville Planning Area
2014	8,682	47	8,729
2034	11,451	1,027	12,478
Change 2014-2034			
Households	2,769	980	3,749
Percent	32%	2085%	43%
AAGR	1.4%	16.7%	1.8%

Source: Metro Gamma Forecast, November 2012

Metro's forecast shows that Wilsonville will grow at an average annual growth rate (AAGR) of 1.8% over the next 20-years. Table 4-1 shows that Wilsonville's population grew at 4.9% between 1990 and 2012. The implication of these figures is that Wilsonville may grow faster than the Metro forecast (and the assumptions used in this study).

New housing units needed over the next 20 years

Table 5-3 shows a forecast of needed housing in the Wilsonville planning area during the 2014 to 2034 period. The projection is based on the following assumptions:

- Metro's forecast for population and housing growth shows that Wilsonville will add 3,749 new households over the 20-year period.

- The assumptions about the mix of housing in Table 5-3 are:

  - Fifty percent of new housing will be single-family detached, a category which includes manufactured housing.

  - Ten percent of new housing will be single-family attached. This assumption is consistent with information from the American Community Survey that shows that about 10% of Wilsonville's existing housing stock is single-family attached.

  - Forty percent of new housing will be multifamily.

Table 5-3. Forecast for new needed housing units, Wilsonville planning area, 2014-2034

	Needed New Housing Units (2014-2034)	
	Percent of new dwellings	Number of new dwellings
New dwelling units		
Single-family detached	50%	1,875
Single-family attached	10%	375
Multifamily	40%	1,499
Total new dwelling units	**100%**	**3,749**
Average new du developed annually		**187**

Source: Metro forecast of housing units; Calculations by ECONorthwest
Note: Dwelling units needed annually is derived by dividing total needed dwellings by 20. Actual rates of development will vary from year to year.

The housing mix presented in Table 5-3 meets the requirements of OAR 660-007 "to provide the opportunity for at least 50 percent of new residential units to be attached single family housing or multiple family housing." Under OAR 660-007, a city can justify an alternative housing mix based on changing circumstances.

The forecast of new units does not include dwellings that will be demolished and replaced. This analysis does not factor those units in; it assumes they will be replaced at the same site and will not create additional demand for residential land.

Needed housing by density range by plan designation

Table 5-4 shows the forecast of needed housing units by density in Wilsonville based on the total estimate of housing need shown in Table 5-3. The forecast in Table 5-4 assumes:

- The overall density of housing in Wilsonville will be 7.1 dwelling units per *gross* acre, which is an average of about 8.7 dwelling units per *net* acre.
  - Single-family detached housing will develop at about 5 dwelling units per gross acre.
  - Single-family attached housing will develop at 10 dwelling units per gross acre.
  - Multifamily housing will develop at 13 dwelling units per gross acre.

Table 5-4. Forecast of needed housing units by mix and density, Wilsonville planning area, 2014-2034

Housing Type	New Dwelling Units (DU)	Percent	Density (DU/gross acre)	Gross Acres
Single-family detached	1,875	50%	5.0	375
Single-family attached	375	10%	10.0	38
Multifamily	1,499	40%	13.0	115
Total	**3,749**	**100%**	**7.1**	**528**

Source: ECONorthwest

The assumed housing mix meets the requirement of OAR 660-007-0030 to "designate sufficient buildable land to provide the opportunity for at least 50 percent of new residential units to be attached single family housing or multiple family housing." The forecast in Table 5-4 results in an average density of 8.7 dwelling units per net acre. This housing density meets the requirements of OAR 660-007-0035 to "provide for an overall density of eight or more dwelling units per net buildable acre."

Needed housing by income level

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

The analysis in Table 5-5 is based on American Community Survey data about income levels in Wilsonville, using information shown in Figure 4-8. Income is categorized into market segments consistent with HUD income level

categories, using Clackamas County's 2012 Median Family Income (MFI) of $73,000. Table 5-5 is based on current household income distribution, assuming approximately that the same percentage of households will be in each market segment in the future.

Based on Wilsonville's current household income distribution, Table 5-5 shows that about 31% of households in Wilsonville could be considered low or very low income, 22% are low-middle income households and 47% are high or upper-middle income.

Table 5-5. Estimate of needed new dwelling units by income level, Wilsonville, 2014-2034

Market Segment by Income	Income Range	Number of households	Percent of Households	Commonly Financially Attainable Housing Products	
				Owner-occupied	Renter-occupied
High (120% or more of MFI)	$87,600 or more	1,162	31%	All housing types; higher prices	All housing types; higher prices
Upper Middle (80%-120% of MFI)	$58,400 to $87,600	600	16%	All housing types; lower values	All housing types; lower values
Lower Middle (50%-80% of MFI)	$36,500 to $58,400	825	22%	Single-family attached; condominiums; duplexes; manufactured on lots	Single-family attached; detached; manufactured on lots; apartments
Lower (30%-50% of less of MFI)	$21,900 to $36,500	450	12%	Manufactured in parks	Apartments; manufactured in parks; duplexes
Very Low (Less than 30% of MFI)	Less than $21,900	712	19%	None	Apartments; new and used government assisted housing

Source: ECONorthwest
MFI is Median Family Income

Wilsonville will have an on-going need for housing affordable to lower-income households. The housing need analysis, and the related policy review, demonstrate that the City is meeting its obligation to plan for needed housing types (as required by ORS 197.303) for households at all income levels. These policies include those that allow for development of a range of housing types (e.g., duplexes, manufactured housing, and apartments) and policies that support government-subsidized housing. This conclusion is supported by the fact that Metro's 2012 *Compliance Report* concluded that Wilsonville was in compliance for the City's Title 1 (Housing Capacity) and Title 7 (Housing Choice) responsibilities.

Need for government assisted and manufactured housing

ORS 197.303 requires cities to plan for government-assisted 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, apartments, etc.). Wilsonville allows development of government-assisted housing in all Residential zones, with the same development standards for market-rate housing. This analysis assumes that Wilsonville will continue to allow government housing in all its Residential zones. Because government assisted housing is similar in character to other housing (with the exception the subsidies), it is not necessary to develop separate forecasts for government-subsidized housing.

- **Manufactured housing on lots.** Wilsonville considers manufactured homes on lots as "dwellings" and are considered the same as on-site construction.[31] As 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,[32] Wilsonville has two manufactured dwelling parks:

  - Oakleaf Park with 63 spaces, all occupied
  - Walnut Mobile Home Park with 57 spaces, all occupied[33]

ORS 197.480(2) requires Wilsonville 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.

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[31] Section 4.001 of the Wilsonville Planning and Land Development Ordinance

[32] Oregon Housing and Community Services, Oregon Manufactured Dwelling Park Directory, http://o.hcs.state.or.us/MDPCRParks/ParkDirQuery.jsp

[33] The Walnut Mobile Home Park is in the RA-H zone on land with a Comprehensive Plan Designation of Industrial.

- Table 5-3 shows that the Wilsonville planning area will grow by 3,749 dwelling units over the 2014 to 2034 period.

- Analysis of housing affordability (in Table 5-5) shows that about 30% of Wilsonville's new households will be low income, earning 50% or less of the County's median family income. One type of housing affordable to these households is manufactured housing.

- Manufactured housing in parks accounts for about 1.3% (120 dwelling units) of Wilsonville's current housing stock.

- National, state, and regional trends during the 2000 to 2010 period showed that manufactured housing parks were closing, rather than being created. For example, between 2003 and 2010, Oregon had a statewide decrease of 25% in the number of manufactured home parks. Since 2000, two manufactured parks with a total of about 300 manufactured home spaces closed in Wilsonville.

- The longer-term trend for closing manufactured home parks is the 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 lower-cost affordable housing options, especially for affordable home ownership. The trend in closure of manufactured home parks increases the shortage of manufactured home park spaces. Without some form of public investment to encourage continued operation of existing manufactured home parks and construction of new manufactured home parks, this shortage will continue.

Table 5-5 shows that the households most likely to live in manufactured homes in parks are those with incomes between $21,900 and $36,500 (30 to 50% of median family income). Assuming that about 1% to 1.5% of Wilsonville's new households (3,749 new dwellings) choose to live in manufactured housing parks, the City may need 37 to 56 new manufactured home spaces. At an average of 8 dwelling units per net acre, this results in demand for 4.7 to 7.0 acres of land.

The City allows development of manufactured housing parks in PDR zones, where the City has 103 vacant suitable buildable acres of land. Development of a new manufactured home park in Wilsonville over the planning period seems unlikely, given the closing of two parks in Wilsonville. The land needed for development of a manufactured housing park is part of the forecast in Table 5-4.

Chapter 6. Residential Land Sufficiency within Wilsonville

This chapter presents a summary of Wilsonville's buildable residential land and an estimate of capacity for new housing on buildable residential land. The inventory was prepared by City staff (see Appendix A). The chapter concludes with comparison between of the capacity of Wilsonville's residential land with the demand for new housing in Wilsonville over the 2014 to 2034 period. In short, the analysis answers the question: "Does Wilsonville have enough residential land to accommodate forecast housing needs?"

SUMMARY OF WILSONVILLE'S RESIDENTIAL LAND SUFFICIENCY

- As of July 2013, Wilsonville had 477 gross acres of suitable buildable land. About 102 gross acres are in Residential Designations, 148 gross acres are in Frog Pond, 206 gross acres are in the Village Designation, and 22 gross acres are in Commercial Designations.

- Wilsonville has capacity to accommodate between 3,390 (under the low capacity scenario) to 4,229 (under the high capacity scenario) dwelling units at an average density of between 7.1 to 8.9 dwelling units per gross acre.

- The residential capacity analysis shows that, based on existing policies, Wilsonville has designated sufficient buildable land to provide opportunity for 48% single-family detached and 52% single-family attached and multifamily housing. This planned capacity is consistent with the requirement of OAR 660-007-0030(1).

- Under the low capacity estimate, with an average density of 7.1 dwelling units per gross acre, Wilsonville has a small deficit of housing capacity (359 dwelling unit deficit). Wilsonville's residential land deficit is about 51 gross acres of suitable buildable land necessary to accommodate Metro's forecast for new dwelling units dwelling units.

- If the City grows faster than Metro's housing forecast (1.8% average annual growth), then Wilsonville will consume residential land sooner than the forecast in this housing needs analysis. Given that the City's historical population growth rate between 1990 and 2012 was nearly 5% annually, and the City grew faster than 3% annually over the past

decade, it seems possible that the City will grow faster than Metro's forecast.

SUMMARY OF BUILDABLE RESIDENTIAL LAND IN WILSONVILLE

Appendix A presents Wilsonville's residential buildable lands inventory, which was prepared by City staff. Table 6-1 presents a summary of the buildable lands inventory. Wilsonville had about 479 gross acres of developable residential land in Wilsonville in 2013. The inventory identified 251 gross acres of vacant buildable land and 228 gross acres of land that is partially vacant or likely to redevelop.

Appendix A presents the full description of the methodology for the buildable lands inventory. In short, the City identified buildable residential land using the following methods:

- **Vacant land.** The City identified land that is fully vacant using information in Metro's RLIS GIS database and refining the results through comparison with current aerial photography, field checks, and local records. Staff identified and removed unbuildable land (e.g., publicly owned land or land in the Significant Resource Overlay Zone) from the inventory of vacant land.

- **Partially vacant land or land likely to redevelop.** The City identified land as partially vacant or likely to redevelop over the next twenty years based on improvement value, land value, and site size. Staff identified and removed unbuildable land from the inventory of partially vacant or likely to redevelop land.

  ○ **Partially vacant land** is land with one (or possibly two) dwelling units on a parcel that could be divided and accommodate additional dwellings. For example, a two-acre parcel within the Wilsonville city limits could reasonably be expected to be partitioned to be able to accommodate new residential development. The existing dwelling on a partially vacant parcel may remain in place, with new dwellings built around it, or may be demolished and replaced with all new development.

  ○ **Land that is likely to redevelop** is land with existing development that is relatively likely to redevelop over the 20-year planning period. Redevelopment will result in demolition of existing structures and development of new structures.

Estimating the amount of suitable buildable land in Wilsonville requires accounting for land in partially vacant parcels where the existing dwelling is likely to be preserved. This area is included in Table 6-1 in the column headed "Partially Vacant Land not Available for Future Development," which shows Wilsonville has 2.7 gross acres of partially vacant parcels (in 24 parcels) where the existing dwelling is likely to be preserved.

Table 6-1 Suitable residential land, Wilsonville, gross acres, 2013

Comprehensive Plan Designation	Amount of land in the Buildable Lands Inventory			Partially Vacant Land not Available for Future Development	Total Suitable Buildable Land
	Vacant	Partially Vacant or Likely to Redevelop	Total Vacant and Partially Vacant or Likely to Redevelop		
Residential	66.1	36.6	102.7	1.0	101.7
0-1 du/ac	0.0	2.2	2.2		2.2
2-3 du/ac	0.3	4.3	4.6	0.67	3.9
4-5 du/ac	3.4	13.4	16.8	0.29	16.5
6-7 du/ac	12.2	8.1	20.3		20.3
6-7/10-12 du/ac*	20.5	0.0	20.5		20.5
10-12 du/ac	29.6	8.6	38.2	0.08	38.1
16-20 du/ac	0.1	0.0	0.1		0.1
Residential, Area of Special Concern L (Frog Pond)**	23.0	126.4	149.4	1.63	147.8
Village	143.4	62.8	206.2		206.2
Commercial	16.9	4.8	21.7		21.7
PDC-TC	13.2		13.2		13.2
PDC	3.7	4.8	8.5		8.5
Total	249.4	230.6	480.0	2.7	477.3

Source: Buildable Land Inventory by the City of Wilsonville; Estimate of Partially Vacant Land not Available for Future Development by ECONorthwest
*Note: The 6-7/10-12 du/ac Designation is one split-zoned property.
**Note: Frog Pond is located within the Metro UGB but outside of Wilsonville's city limits.

RESIDENTIAL LAND CAPACITY IN WILSONVILLE

The capacity analysis estimates the number of new dwelling units that can be accommodated on Wilsonville's residential land supply.[34] The capacity analysis evaluates ways that vacant suitable residential land may build out by applying different assumptions.

In short, land capacity is a function of buildable land, housing mix (as determined by plan designation or zoning), and density. The basic form of any method to estimate capacity requires (1) an estimate of *buildable* land (e.g., land that is developable minus constraints such as Wilsonville's Significant Resource Overlay Zone (SROZ)), and (2) assumptions about density. The arithmetic is straightforward:

Buildable Land (ac) * Density (du/ac) = Capacity (in dwelling units)

For example:

100 acres * 8 du/ac = 800 dwelling units of capacity

The example is a simplification of the method, which skips some of the nuances that can be incorporated into an analysis of capacity (e.g., different densities and housing mixes in different Comprehensive Plan Designations).

The capacity analysis modeled two scenarios of potential housing capacity: (1) a low capacity scenario, and (2) a high capacity scenario. The scenarios are based on existing policies (where available) and use the following information and assumptions:

- **Suitable buildable land** by Comprehensive Plan Designation summarized in Table 6-1, based on the analysis presented in Appendix A.

- **Planned density** for Residential land shown in Table 6-2. For Residential land within Wilsonville's city limits, the density assumptions are based on assigned densities in the Comprehensive Plan.

- **Potential density** for residential development on the Residential land in the Area of Special Concern L (a.k.a. Frog Pond), which is located

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[34] In this report, the term *"capacity analysis" is used as shorthand for* estimating how many new dwelling units the vacant residential land in the UGB is likely to accommodate.

within the Metro urban growth boundary but not within Wilsonville's city limits.

- **Planned density** for the Village designation. The adopted Villebois Master Plan describes the amount and type of housing yet to be built in Villebois, summarized in Table 6-4.

- **Commercial land** residential capacity, shown in Table 6-5, based on analysis of low and high residential development capacity on commercial land developed by City of Wilsonville staff.

Density Assumptions

Estimating the capacity of vacant residential land to accommodate new dwelling units requires assumptions about the number of units allowed per acre, or density. Table 6-2 presents a range of density assumptions (from low to high) by Comprehensive Plan Designation for Residential land. This section does not present assumptions about capacity in the Village designation because the Villebois Master Plan describes the number of units planned for Villebois.

- **Residential Designations within the city limits.** The density assumptions for the Residential Designations are based on the low and high density allowed in the designation. For example, in the 4-5 du/ac designation, we assume a low density of 4.0 dwelling units per gross acre and a high of 5.0 dwelling units per gross acre.

Frog Pond.[35] Frog Pond is unincorporated, not yet master planned, and does not have a set density range. Table 6-2 presents a range of housing densities that illustrates Frog Pond's <u>potential</u> capacity.

The low estimate assumes that Frog Pond will have a minimum of 5.0 dwelling units per gross acre (about 6.0 dwelling units per net acre). The low density estimates that Frog Pond will be developed predominantly with single-family detached housing, with lot sizes averaging about 7,250 square feet.

The high estimate assumes that Frog Pond will have a minimum of 8.5 dwelling units per gross acre (about 10.5 dwelling units per net acre). The high density estimate assumes that Frog Pond will be developed with a

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[35] In this report, we refer to land in the Residential Area of Special Concern L as Frog Pond. This area is within the Metro UGB but outside of Wilsonville's city limits.

mix of housing types but predominantly single-family detached and attached housing, with lot sizes averaging about 4,150 square feet.

Table 6-2. Density assumptions

Comprehensive Plan Designation	Density Assumptions (gross acres)	
	Low	High
Residential within the city limits		
0-1 du/ac	1.0	1.0
2-3 du/ac	2.0	3.0
4-5 du/ac	4.0	5.0
6-7 du/ac	6.0	7.0
6-7/10-12 du/ac	6.0	12.0
10-12 du/ac	10.0	12.0
16-20 du/ac	16.0	20.0
Frog Pond	5.0	8.5

Source: Wilsonville Comprehensive Plan and ECONorthwest
Note: Frog Pond refers to the Residential Area of Special Concern L.

Housing capacity estimates

Table 6-3 shows the results of the estimate of housing capacity potential on land designated Residential and in Frog Pond.

- **Residential Designations within the city limits.** Collectively, the land currently within the city limits that is designated as Residential has capacity for between 701 to 942 dwelling units, at the adopted densities.

- **Frog Pond.** The Frog Pond area can accommodate between 738 and 1,256 new dwelling units, assuming densities from 5.0 to 8.5 dwelling units per gross acre.

Table 6-3. Estimate of capacity in the Residential Plan Designation, new dwelling units, Wilsonville

Comprehensive Plan Designation	Suitable Buildable Land (gross acres)	Capacity (dwelling units)	
		Low	High
Residential within the city limits	101.7	701	942
0-1 du/ac	2.2	2	2
2-3 du/ac	3.9	7	11
4-5 du/ac	16.5	66	82
6-7 du/ac	20.3	121	142
6-7/10-12 du/ac	20.5	123	246
10-12 du/ac	38.1	381	457
16-20 du/ac	0.1	1	2
Frog Pond	147.8	738	1,256

Source ECONorthwest
Note: Frog Pond refers to the Residential Area of Special Concern L.

The 2003 Villebois Master Plan calls for a minimum of 2,300 dwelling units in Villebois. The most recent refinement to the Villebois Master Plan (adopted in July 2013) results in addition of 232 additional dwelling units.[36] The Villebois Master Plan included an area labeled "Future Study Area", with the assumption that housing units would be planned at a later date. Based on recent proposals to develop this area, it is assumed that this area has capacity for about 113 single-family detached units.

Table 6-4 shows that Villebois has total capacity for 2,645 dwelling units,[37] based on the refinements to the Master Plan. As of the end of 2012, the City had approved building permits for development of 909 dwelling units in Villebois. The Villebois master plan allows for an additional 1,736 new units in Villebois. The planned capacity for new units is 656 single-family detached units and 1,080 multifamily and single-family attached units.

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[36] Planning Case File DB13-0021 includes this finding in "Subsection 4.125 (.18) J. 1. a. v. SAP Refinements: Density".

[37] The capacity for dwelling units in Villebois is as follows: 2,300 dwelling units described in the unmodified Master Plan, plus the refinements to the Master Plan to add 232 more units, and plus the proposed refinement to the Master Plan to add 113 units on the Future Study Area site. That results in 2,645 dwelling units.

Table 6-4. Villebois capacity

	Units
Units planned	2,645
Units permitted through 2012	909
Single-family detached	470
Multifamily	439
Units left to build	1,736
Single-family detached	656
Multifamily	1,080

Source: Villebois Master Plan; Wilsonville building permit database;
analysis by ECONorthwest
Note: Multifamily includes single-family attached

Table 6-5 shows that Wilsonville has about 22 acres of land zoned for commercial use that the City has identified as having capacity for residential development. About 13 acres of this land is in Town Center and the remaining land is zoned PDC.

- **Town Center (PDC-TC).** City staff estimated the capacity in the Town Center designation ranges from 200 to 270 dwelling units based on assumptions about the type of development expected to locate in Town Center.

- **PDC.** City staff estimated the capacity in the Commercial designation ranges from 15 to 25 dwelling units.

Table 6-5. Capacity on commercial land

Comprehensive Plan Designation	Suitable Buildable Land (gross acres)	Capacity (dwelling units)	
		Low	High
Commercial	21.7	215	295
PDC-TC	13.2	200	270
PDC	8.5	15	25

Source City of Wilsonville staff

Capacity Summary

Table 6-6 shows that Wilsonville's 477 acres of suitable buildable residential land base has capacity to accommodate between 3,390 and 4,229 new dwelling units.

- The **low** capacity scenario results in an overall density of 7.1 dwelling units per gross acre or 8.7 dwelling units per net acre.

- The **high** capacity scenario results in an overall density of 8.9 dwelling units per gross acre or 10.9 dwelling units per net acre.

Table 6-6. Summary of housing capacity on suitable buildable land, Wilsonville

Comprehensive Plan Designation	Low Capacity (dwelling units)	High Capacity (dwelling units)	Average Development Densities (dwelling units per gross acre (du/ga))		
			Suitable Buildable Land (gross acres)	Low Capacity (du/ga)	High Capacity (du/ga)
Residential	701	942	102	6.9	9.3
Residential, Area of Special Concern L (Frog Pond)**	738	1,256	148	5.0	8.5
Villebois	1,736	1,736	206	8.4	8.4
Commercial	215	295	22	9.9	13.6
Total	3,390	4,229	477	7.1	8.9

Source ECONorthwest
**Note: Frog Pond is located within the Metro UGB but outside of Wilsonville's city limits.

The conclusions of the capacity analysis are that:

- Both scenarios exceed the State requirement (OAR 660-007-0035(2)) to "provide for an overall density of eight or more dwelling units per <u>net</u> buildable acre." The low capacity scenario results in an average density of 8.7 dwelling units per net acre and the high capacity scenario results in an average density of 10.9 dwelling units per net acre.

- Both scenarios result in an average density lower than the 12.4 dwelling units per net acre of residential development constructed in Wilsonville over the 2000 to 2012 period.

Estimate of housing mix based on capacity analysis

The planned density assumptions for Residential Designations presented in Table 6-2, the capacity estimates for housing in Villebois (Table 6-4), and Commercial (Table 6-5) have implications for the types of housing likely to be built in Wilsonville. This section describes the probable housing mix likely to be developed in Wilsonville as a result of the City's existing residential development policies and the assumptions of future densities in Frog Pond.

Table 6-7 shows an estimate of the mix of housing (single-family detached housing compared to single-family attached and multifamily housing) on Wilsonville's suitable buildable residential land. We estimated the type of housing in each area based on the following assumptions:

- **Residential.** Table 6-2 shows the low and high density assumptions in each Residential Designation, based on the densities allowed in the Comprehensive Plan. The analysis in Table 6-7 makes the following assumptions about housing mix for both the low and high capacity scenarios:

  - In Comprehensive Plan Designations with a density of 7 dwelling units per acre or lower, all new housing is assumed to be single-family detached housing.

  - In the 6-7/10-12 dwelling unit per acre Comprehensive Plan Designation, 55% of dwelling units are assumed to be single-family detached housing and 45% are assumed be single-family attached and multifamily housing.

  - In the 10-12 dwelling unit per acre Comprehensive Plan Designation, 10% of dwelling units are assumed to be single-family detached housing and 90% are assumed be single-family attached and multifamily housing.

  - In the 16-20 dwelling unit per acre Comprehensive Plan Designation, all new housing is assumed to be single-family attached and multifamily housing.

- **Frog Pond.** Table 6-7 assumes a different housing mix based on the different average density assumptions in the low and high capacity scenarios.

  - In the low capacity scenario, Table 6-2 assumes an average density of 5.0 dwelling units per gross acre. Table 6-7 assumes that 90% of housing will be single-family detached and 10% will be single-family attached.

- In the high capacity scenario, Table 6-2 assumes an average density of 8.5 dwelling units per gross acre. Table 6-7 assumes that 75% of housing will be single-family detached and 25% will be single-family attached.

- **Villebois.** Table 6-7 uses the housing mix shown in Table 6-4.

- **Commercial.** Table 6-7 assumes that all housing on Commercial land will be single-family attached or multifamily because housing is only allowed in Commercial as part of a mixed-use development.

Both the low and high capacity scenarios in Table 6-7 result in a housing mix of 48% single-family detached and 52% single-family attached and multifamily for new construction, city-wide. Both scenarios exceed the State requirement (OAR 660-007-0030(1)) to "to provide the opportunity for at least 50 percent of new residential units to be attached single family housing or multiple family housing or justify an alternative percentage based on changing circumstances."

Table 6-7. Estimated housing mix on Wilsonville's buildable residential land based on existing development densities

Comprehensive Plan Designation	Low Capacity (dwelling units)		High Capacity (dwelling units)	
	Single-family detached	Single-family attached and multifamily	Single-family detached	Single-family attached and multifamily
Residential	302	399	418	524
Residential, Area of Special Concern L (Frog Pond)**	664	74	942	314
Villebois	656	1,080	656	1,080
Commercial	0	215	0	295
Total Units	1,622	1,768	2,016	2,213
Percent of Total	48%	52%	48%	52%

Source ECONorthwest
**Note: Frog Pond is located within the Metro UGB but outside of Wilsonville's city limits.

RESIDENTIAL LAND SUFFICIENCY

Table 6-8 compares the capacity of buildable residential land to accommodate new housing (Table 6-7) with demand for new housing (Table 5-4). Table 6-8 shows:

- Wilsonville has capacity to accommodate between 3,390 and 4,229 new dwelling units.

- Metro forecasts 3,749 new dwelling units for the 2014-2034 period.

- Wilsonville's buildable residential land has capacity to accommodate more housing than Metro's forecast for new housing in Wilsonville over the 2014 to 2034 period.

  - Under the **low capacity scenario** and density assumptions, Wilsonville does not have enough land to accommodate new housing over the 20-year period. Wilsonville has a deficit of land to accommodate 359 new dwelling units, 253 of which are single-family detached and 106 of which are attached single-family or multifamily.

  - Under the **high capacity scenario** and density assumptions, Wilsonville has enough land to accommodate new housing over the 20-year period. Under this scenario, Wilsonville can accommodate 480 dwelling units more than the Metro forecast projects over the 20-year period.

Table 6-8. Comparison of the Capacity of Buildable Residential Land to accommodate new housing with demand for new housing, Wilsonville, 2014 to 2034

	Capacity on Buildable Residential Land (dwelling units)		Demand for New Housing (dwelling units)	Comparison Capacity *minus* Demand (dwelling units)	
	Low Capacity	High Capacity		Low Capacity	High Capacity
Single-family detached	1,622	2,016	1,875	-253	141
Single-family attached and multifamily	1,768	2,213	1,874	-106	339
Total	3,390	4,229	3,749	-359	480

Source ECONorthwest

A comparison of Wilsonville's supply 477 gross acres of residential land (Table 6-1) with the City's demand for 528 gross acres residential land (Table 5-4) shows that Wilsonville has a deficit about 51 gross acres of residential land for housing over the 20-year period.

CONCLUSIONS AND RECOMMENDATIONS

The key findings of the residential land study are that:

- **Wilsonville's Comprehensive Plan and Development Code meet state requirements.** The City's primarily obligations are to (1) designate land in a way that 50% of new housing could be either multifamily or single-family attached housing (e.g., townhouses); (2) achieve an average density of eight dwelling units per net acre; and (3) provide enough land to accommodate forecasted housing needs for the next 20 years.

- **Wilsonville's existing housing stock is 50% multifamily, 41% single-family detached, and 9% single-family attached.** Within these broad housing types, Wilsonville's housing stock is a mixture of housing types. For example, Wilsonville's single-family detached housing ranges from mobile and manufactured housing to more affordable single-family detached housing to higher-amenity single-family detached housing. Wilsonville's multifamily housing stock includes condominiums, duplexes, tri- and quad-plexes, government-subsidized affordable housing, housing targeted at seniors, and apartments with a wide range of amenities (e.g., swimming pools, patios, or internet service).

- **Wilsonville could attain a more balanced housing portfolio on the remaining buildable land.** The densities planned in the City's Comprehensive Plan allow for a development mix of 50% single-family detached and 50% single-family attached or multifamily housing, if Frog Pond is planned exclusively for single-family detached housing. When planning for future development in Frog Pond, the community has latitude (though not complete autonomy) for local decision making about the type and density of housing.

- **Wilsonville is planning for a complete, balanced community.** The Wilsonville Comprehensive Plan calls for a balanced portfolio of different housing types that are well-designed and will be developed across the community to serve different people at different points in their lives.

- **Wilsonville is meeting its obligation to plan for needed housing types for households at all income levels.** Wilsonville's residential development policies include those that allow for development of a range of housing types (e.g., duplexes, manufactured housing, and apartments) and that support government-subsidized housing. This conclusion is supported by the fact that Metro's 2012 *Compliance Report*

concluded that Wilsonville was in compliance with Metro Functional Plan and Title 7 (Housing Choice). Wilsonville will have an on-going need for housing affordable to lower-income households.

- **Wilsonville's decision makers want to provide more opportunities for the development of more single-family detached housing.** Discussions with Wilsonville's Planning Commission and City Council revealed that these bodies want to provide opportunities for development of a larger percentage single-family detached housing than recent development trends have produced. The low-capacity scenario for future growth would provide more single-family detached housing, as part of the housing mix. Based on these discussions, ECONorthwest recommends that the City use the low-capacity scenario to determine whether Wilsonville has enough land to accommodate Metro's forecast for housing growth.

- **Wilsonville's primary opportunity for development of a larger percentage of single-family detached housing is in Frog Pond.** Aside from opportunities for additional single-family detached housing in Frog Pond, the City has a few policy-making options to influence the amount of single-family detached housing developed in Wilsonville.

  The primary way the City influences development of single-family housing is through zoning. However, the capacity analysis shows that build-out of Wilsonville's residential land base under the adopted zoning and designations in the Comprehensive Plan will result in a new-housing mix of 48% single-family detached and 52% single-family attached and multifamily housing. Getting a larger percentage of new single-family detached housing would require downzoning land within the City that has long been planned for higher densities or changing the adopted Villebois Master Plan.

  Additionally, the City has discretion to make decisions on specific applications for approval of zone changes and density bonuses, or otherwise incentivize certain forms of housing. The City can choose to decrease the use of density bonuses or public investments that decrease the costs of production of single-family detached housing.

- **Wilsonville cannot accommodate Metro's forecast for growth on existing residential land.** Metro forecasts growth of about 3,749 new households in the Wilsonville Planning Area. Under the low capacity scenario, Wilsonville has capacity for 3,390 new dwellings and will consume its residential land supply by about 2032.

The key conclusion, that Wilsonville does not have sufficient residential land to accommodate forecasted growth over the 20-year period, might be

exacerbated if Wilsonville grows faster than Metro's forecast for the 2014 to 2034 period.

- **Wilsonville has historically grown faster than Metro's growth forecasts.** Between 2000 and 2012, Wilsonville added 6,500 new people—an increase of 47%. This growth has continued throughout the economic recovery: between July 2012 and July 2013, Wilsonville added more than 1,000 new residents. In addition, Wilsonville's households grew at 2.8% average annual growth rate over the 2000 to 2012 period.

- **Wilsonville and surrounding areas are expecting substantial employment growth in the next 20 years.** Three major regional employment areas (Coffee Creek, Basalt Creek, and West Railroad) will be within or adjacent to Wilsonville. Metro forecasts growth of nearly 5,000 employees in these areas. In addition, Metro forecasts growth of 9,000 new jobs in the Wilsonville planning area. Much of this employment growth in and around Wilsonville is expected to be in higher-than-average wage jobs, such as manufacturing.

  This job growth will drive increased demand for housing in the southern Portland metropolitan area. The 5,000 new jobs in the regional employment areas may generate growth of more than 4,500 households in the southern Portland metropolitan area.[38]

- **Wilsonville's decision makers are concerned about potential pressure that additional employment growth and commuting may place on the regional transportation system.** Many people who work in Wilsonville live in other communities. Additional job growth in and around Wilsonville has the potential to increase pressure on regional transportation facilities, especially if people continue to live in other communities and commute to Wilsonville for work.

  City policy is to attract more Wilsonville workers to live in the City. Providing housing options in close proximity to employment centers could reduce pressures on the transportation system and reduce household commuting costs.

- **Wilsonville is likely to grow at a faster rate than Metro's forecasts predict.** Metro projects 1.8% average annual growth of households in

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[38] This estimate is based on American Community Survey data, which shows that Washington and Clackamas Counties combined have a household to jobs ratio of 0.93 households per job.

the Wilsonville planning area. Wilsonville's higher historical growth rates, combined with forecasts for employment growth of 5,000 employees in and around Wilsonville, suggest that Wilsonville is likely to grow faster than Metro's forecast.

The implication of a faster growth rate is that the City needs to plan to accommodate housing demand beyond land in the Wilsonville Planning Area (which includes Frog Pond). The following section describes ECONorthwest's conclusions and recommendations for Wilsonville to plan for expected and potential housing growth.

Policy recommendations for accommodating residential growth

A key objective of the Wilsonville Residential Land Study is to inform policy choices related to residential development. Wilsonville's key residential policy choices are on the topics of planning for growth areas in Frog Pond and Advance Road, residential development in Town Center, monitoring development activity, and removing barriers to needed housing types in the city development code.

Frog Pond

Information in the Residential Land Study will inform the Frog Pond Concept Plan and subsequent Master Plan. The City would like to develop strategies to determine desired densities and housing types for the Frog Pond Concept Plan. Given the City's experience with implementing the Villebois Master Plan, the adoption of a Frog Pond Concept Plan will provide a sufficient regulatory framework for developing certainty about achieving a specific mix and density of housing.

The land capacity analysis considered two density and mix scenarios for Frog Pond:

- **Low Capacity:** this scenario assumed a housing mix of 90% single-family detached and 10% multifamily and/or single-family attached housing with an average density of 5.0 dwelling units per gross residential acre.

- **High Capacity:** this scenario assumed a housing mix of 75% single-family detached and 25% multifamily and/or single-family attached housing with an average density of 8.5 dwelling units per gross residential acre.

Based on discussions with Wilsonville's decision makers about their desire to achieve a more balanced housing mix and the results of the housing needs

analysis, ECONorthwest recommends that Wilsonville plan for predominantly single-family detached housing in Wilsonville.

While this study does not set the densities or other development assumptions for Frog Pond, it provides a reasonable place to begin discussions about residential development at Frog Pond. ECONorthwest recommends that the density and mix assumptions eventually built into the Frog Pond Concept Plan consider the results of the housing needs analysis, comply with the density and mix requirements of OAR 660-007, and consider the context of overall housing need in Wilsonville.

Advance Road

The Residential Land Study concludes that Wilsonville may have need for additional residential land, by 2032 or sooner. Advance Road was identified as an Urban Reserve area for residential uses. The City is beginning to plan for development of Advance Road, through the Concept Planning process for Frog Pond and Advance Road.

ECONorthwest recommends that City staff use information from Wilsonville's residential growth monitoring program to inform regional discussions with Metro about expansion of the UGB, which happen on a five-year cycle. City staff can provide Metro with information about population and housing growth, as well as residential development and land consumption, to inform UGB expansion discussions.

Given the amount of time it takes to get a new area to be development-ready (i.e., brought into the UGB, planned, and services extended to the area), Wilsonville should begin discussions about bringing Advance Road into the UGB as part of the next cycle of UGB expansion discussions.

Town Center

City staff estimated the capacity in the Town Center zone ranges from 200 to 270 dwelling units. Town Center may be able to accommodate more housing, depending on the community's vision for development. The issue of how much housing to encourage in the Town Center is beyond the scope of this study.

ECONorthwest recommends that the City update the vision and master plan for Town Center, as part of a future planning process. This update should determine the potential market for housing in the Town Center, the amount and types of housing that the community wants in Town Center, Town Center's relationship to other residential areas, and how housing will relate to commercial development in Town Center.

Monitoring development activity

The determination of residential land sufficiency (page 19) is based on dwelling unit forecasts prepared by Metro. The Metro forecasts show new housing units increasing at a rate of 1.8% annually between 2014 and 2034 in the Wilsonville Planning Area. Under this forecast, Wilsonville will run out of residential land by about 2032.

If Wilsonville grows faster than Metro's forecast predicts, the city will run out of residential land sooner. For example, Wilsonville's household growth over the 2000-2012 period averaged about 2.8% annually. If Wilsonville continues to grow at this rate, the city will consume the available residential land by about 2025.

ECONorthwest recommends that City staff develop a monitoring program that will allow Wilsonville to understand how fast land is developing. The monitoring program will inform Metro's UGB planning process by providing more detailed information about housing growth and development capacity in Wilsonville. This information can help City staff and decision-makers make the case to Metro staff and decision-makers about the need for residential expansion areas.

A monitoring program will allow Wilsonville to understand how fast land is developing and to provide data to Metro at least a year in advance of when an Urban Growth Report is issued. In short, the data can help inform Metro's UGB planning process. We recommend using the following metrics to monitor residential growth:

- **Population**. The City already routinely monitors population growth by using the annual population estimates prepared by the Center for Population Research at Portland State University.

- **Building permits**. The Residential Lands Study included a review of building permits by dwelling type, plan designation, zone, and net density. Because the City is already collecting this data, we recommend that city staff update this analysis on an annual basis. The City already reports building permit data by dwelling type on a quarterly basis, but including the zone and net density will enable the City to understand the type, density, and location of housing that is being developed.

- **Subdivision and partition activity**. This metric is intended to measure the rate and density of land divisions in Wilsonville. It may also be useful in determining right-of-way and open space dedications. Specific data to include with subdivision and partition activity are the area of the parent lot, the area in child lots, the number

of child lots, the average size or density of lots, and the area in dedicated right-of-way.

- **Land consumption**. This metric relates closely to the building permit data. The building permit data include tax lot identifiers for each permit. The City should match each permit to data in the buildable lands inventory and report how much land is being used by plan designation, zone, and land classification (e.g., vacant, redevelopable, infill, etc.). Additionally, we recommend the City map the location of development on an annual basis.

- **Right-of-way and open space dedications**. The Wilsonville Comprehensive Plan states residential density targets in terms of gross acres. The density target in OAR 660-007 is stated in net acres and the density analysis conducted for the Residential Land Study was also presented in net acres. Monitoring net-to-gross factors can provide information that is useful in better understanding the amount of land that is used for streets and required open space dedications. Measuring this has some inherent complications in terms of how to define and measure different components. It is potentially easiest in major subdivisions and village areas.

Legislative action on code changes

As part of this study, Wilsonville staff conducted a Goal 10 policy and Development Code evaluation. Staff concluded that Wilsonville is "...in compliance with applicable Federal and State housing regulations." City and DLCD staff identified several types of amendments to the Development Code needed to better comply with state requirements to review residential development through a clear and objective process:

- Add "duplex" to the list of uses allowed in all PD-R zones (Section 4.124). These zones allow single-family and multifamily development; duplexes are already allowed in every other zone in the City.

- Add an alternative, objective review process for new attached and detached single-family housing proposed in the Old Town Overlay Zone.

- Ensure the Site Design Review process is used to review the design of multifamily buildings in a clear and objective manner.

ECONorthwest recommends that the City take action on these amendments. No Comprehensive Plan text or map amendments are needed.

Appendix A. Summary of Residential Buildable Lands Inventory

This appendix presents the Residential Buildable Inventory memorandum developed by City of Wilsonville staff.

TO: WILSONVILLE PLANNING COMMISSION

FROM: KATIE MANGLE, LONG RANGE PLANNING MANAGER

SUBJECT: GOAL 10 HOUSING PROJECT: RESIDENTIAL BUILDABLE LANDS INVENTORY

DATE: REVISED JULY 17, 2013

CC: CHRIS NEAMTZU, PLANNING DIRECTOR

The primary purpose of the Residential Buildable Lands Inventory is to estimate the amount of land that could develop, or re-develop, with housing over the next 20 years, as required by ORS 197.296. This information will be used to assess the adequacy of the residential buildable land supply for new development and infill or redevelopment within the Wilsonville planning area.[1]

Summary

At the time data was collected for this inventory, February 2013, Wilsonville had 480 gross acres of land available for residential development (see table below, and Attachment 1, Wilsonville Residential Buildable Lands Map).

Wilsonville Buildable Residential Lands Inventory (gross acres)

Comprehensive Plan Designation	District	Vacant Land	Partially Vacant, or Likely to Redevelop	TOTAL Buildable Residential Land	TOTAL Acreage Citywide (approx.)
Residential	0-1 du/ac	-	2.2	2.2	
	2-3 du/ac	0.3	4.3	4.6	
	4-5 du/ac	3.4	13.4	16.7	
	6-7 du/ac	12.2	8.1	20.3	
	6-7/10-12 du/ac *	20.5	-	20.5	
	10-12 du/ac	29.6	8.6	38.2	
	16-20 du/ac	0.1	-	0.1	
	subtotal for land within City limits	**66.1**	**36.6**	**102.6**	
	Residential Area L (Frog Pond - outside City limits)	23.0	126.4	149.4	
	Total Residential	**89.1**	**163.0**	**252.1**	**1,613**
Village		143.4	62.8	206.2	466
Commercial		16.9	4.8	21.7	356
Industrial		0.0	0.0	0.0	1,605
Public		0.0	0.0	0.0	448
TOTAL		**249.3**	**230.6**	**480.0**	**4,488**
* property is split-zoned					

(Residential Districts label appears vertically alongside the residential district rows.)

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[1] Includes land that is covered by the Wilsonville Comprehensive Plan.

The inventory presented is based on specific assumptions, outlined in the methodology that follows. The inventory should not be considered to be an exhaustive list of what is/is not available for development, but rather a static representation based on the available data. In fact, some of the parcels have already been developed since the inventory data was collected in February 2013. Inclusion does not mean a property will develop, nor does it confer a mandate to do so, just as exclusion does not prevent a property from developing in the future. For purposes of this inventory, buildable lands were identified as property outside of the Significant Resource Overlay Zone (SROZ) that is fully vacant, partially vacant, or likely to redevelop over the next 20 years.

Inventory Methodology

The following methodology describes the steps that were taken to estimate Wilsonville's buildable residential lands. "Buildable land" means land that is suitable, available, and necessary for residential uses, including both vacant land and land likely to be redeveloped.

Step 1. Inventory and map fully vacant residential lands
- City tax lot data was sorted by Comprehensive Plan designation. All lots designated on the Comprehensive Plan map as Residential, Commercial, and Village were included in the inventory. Commercial was included because the zones that implement this designation, Planned Development Commercial (PDC) and Planned Development Commercial Town Center (PDC-TC), allow for mixed uses to include residential.
- To identify parcels that are fully vacant, the analysis selected lots not identified as "developed" in METRO's RLIS GIS data. Planning Division staff refined this step, based on current aerial photography, field checks, and local records.
- Vacant parcels are mapped in red on Working Map 1.

Step 2. Inventory and map redevelopable lands
The following steps were taken to estimate which lands may redevelop over the next 20 years. Redevelopment potential applies to lots that were initially classified as "developed", but which are likely to redevelop during the planning period. While many methods exist to identify redevelopment potential, a common indicator is improvement value or improvement-to-land value ratio. This analysis used the following methodology, which was developed during Wilsonville's 2005 Residential Buildable Land Inventory and based on Metro's 2002 UGB Alternatives Analysis, to identify redevelopable lands.
- A query was performed of all lots to identify those that are not vacant but have potential to redevelop over time due to the relationship between the size of the lot and the value of improvements.
  - Sites that are 0.26-0.5 acres with improvement values less than $50,000 (mapped as orange on Working Map 1)
  - Sites that are over 0.6 acres with improvement values between $50,001- $100,000 (mapped as blue on Working Map 1)
  - Sites that are over 1 acre with improvement values between $100,001-$150,000 (mapped as pink on Working Map 1)

- The results of this query includes land that is wholly redevelopable, meaning existing improvements would be replaced; and also land that is partially vacant, meaning the lot could be divided to allow for additional development. [2]

The results of Steps 1 and 2 are shown in Buildable Residential Lands Working Map 1.

Step 3. Subtract unbuildable acres
Land that falls into any of the following categories were deducted from the inventory:
- Mapped Significant Resource Overlay Zone (SROZ – includes Metro Functional Plan Title 3 and 13 land, land with greater than 25% slope, and 100-year floodplain). Development constraints on this land are outlined in Wilsonville Development Code Section 4.139;
- Home Owner Association-owned lots, and community or public open space tracts;
- Publicly owned land;
- Land encumbered with powerline easements.

The results of Step 3 are shown in Buildable Residential Lands Working Map 2.

Step 4. Planning staff review of draft map
Planning staff reviewed Working Map 2 and made changes to the inventory based on site visits, building permit information, assessment of constraints posed by the Development Code, and aerial photography.
- Removed lots that are under or pending construction (as of 2/28/13).
- Added back to the map and re-defined the following as Buildable:
  - Unbuilt lots in Area of Special Concern A, the Villebois master plan area[3];
  - City-owned property that is buildable (i.e., excess property not being held for a public purpose).
- Added back to the map and re-defined the following as "redevelopable or partially vacant" (and therefore likely to be redeveloped or divided for infill development):
  - Sites that are currently for sale and "soft" though they do not meet the quantitative selection criteria (e.g., a mobile home park that is unoccupied and for sale);
  - Lots that are more than twice the minimum lot size required to support the number of existing dwelling units;
  - Lots in Area of Special Concern L (Frog Pond area)[4];

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[2] Outside of the Village zone, most development in Wilsonville is permitted as Planned Development through a two-stage process that begins with development of a master plan. This process allows for a great deal of flexibility (e.g., most residential zones allow both multifamily and single family housing types).

[3] Most of the available residential land within the City of Wilsonville is within the Villebois planned development area. A Master Plan for this area and subsequent Specific Area Plans identify specific housing typologies and number of units. The Plans are implemented through the Village zone. All existing structures in this area will be removed as the Plan is implemented.

[4] The Frog Pond area is comprised of approximately 40 taxlots used for rural residential and agricultural purposes. The area is planned for predominantly residential development, within the Metro urban growth boundary, and designated as Residential in the Wilsonville Comprehensive Plan. No specific densities or zones have been applied to this area. Many

o   Sites that should have been identified as "partially vacant" but were not caught in Step 2.

- Removed from map and defined the following as "Not likely to redevelop":
    o   Subsidized housing sites (which met the quantitative criteria only because of public write-down of land value);
    o   Sites occupied by active religious institutions;
    o   Sites with documented site challenges (documented geo technical limitations, etc.);
    o   Sites with known deed restrictions;
    o   Sites currently under development;
    o   All lots in the Charbonneau development, including the golf course. Staff considers this planned community to be built-out and unlikely to redevelop;
    o   Sites occupied by utility infrastructure (e.g., a PGE substation);
    o   Commercially-zoned land greater than ½ mile from either Residential or Town Center lots. Such sites have almost no likelihood of being mixed-use with residential.

The results of Step 4 are shown in Buildable Residential Lands Working Map 3.

Step 4. Analysis of Sites Identified as Likely to Redevelop
Lots outside of the Villebois Village and Frog Pond areas that were identified as "likely to redevelop" in Steps 2 and 3 were evaluated against four additional indicators of potential to redevelop (see Attachment 5 for the results of this analysis). This more detailed, lot-by-lot analysis was only performed on the subset of lots that met the criteria outlined for tasks 2 and 3.
- Underbuilt: the number of dwelling units on the site is less than 50% of that allowed by the lot's zoning
- Zoning: the lot is planned for residential development, but still zoned RA-H
- Site of Lot: the lot size is either twice the minimum lot size (if zoned for development), or greater than 2 acres (if zoned RA-H)

For lots that were added in Step 3 to the inventory due to the large lot size (for which improvement value itself did not indicate redevelopment), staff checked on the potential for the lot to be divided.

Two lots that met the Step 2 criteria were removed from the inventory during Step 4 because, though the improvement value is low relative to lot size, even with redevelopment the size of the lot would not support additional housing units.

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taxlots include improvements; it is anticipated that when the Frog Pond area develops, some of these structures will remain, and some will be replaced.

Step 5. Redevelopment Strike Price Analysis
- A query was performed on all taxlots planned for Residential and Commercial development, to identify Multifamily and Commercial sites with a market redevelopment "strike price" of less than $10/ square foot.[5]

$$\text{Strike Price} = \frac{\text{(Improvement value + land value)}}{\text{Total Square Feet of Lot}}$$

The results of this "Strike price" analysis are shown in Buildable Residential Lands Working Map 4.

Most of the sites identified by this query were already identified in Steps 1, 2, and 4. As a result of this query, seven sites totaling 5.35 acres were added to the inventory.

**Step 6. Sort vacant and redevelopable lots by Comprehensive Plan designation**

The Comprehensive Plan designation is used, instead of the zone, because in Wilsonville's land use system the Comprehensive Plan dictates the planned residential density on land outside of the (Villebois) Village zone. Vacant and redevelopable land in Wilsonville is held in a low-density Residential Agricultural-Holding (RA or RA-H) zone until the land is ready for development, at which time it must be re-zoned according to the densities in the Comprehensive Plan.

The results of Step 6 are shown in Attachment 1, the Wilsonville Buildable Residential Lands Map.

Attachments:

1. Wilsonville Residential Buildable Lands Map
2. Working Map 1, showing first screen of vacant and redevelopable lands
3. Working Map 2, after unbuildable areas were removed
4. Working Map 3, after lots were added or removed during staff review
5. Results of the analysis of lots likely to redevelop.
6. Working Map 4, showing results of the Strike price analysis

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[5] This formula is part of the draft proposed Metro methodology for identifying sites zoned for Multifamily and Mixed Use development that are likely to redevelop. $10/ sq ft is the estimated threshold for the market supporting redevelopment of suburban sites that are zoned for Multifamily development.
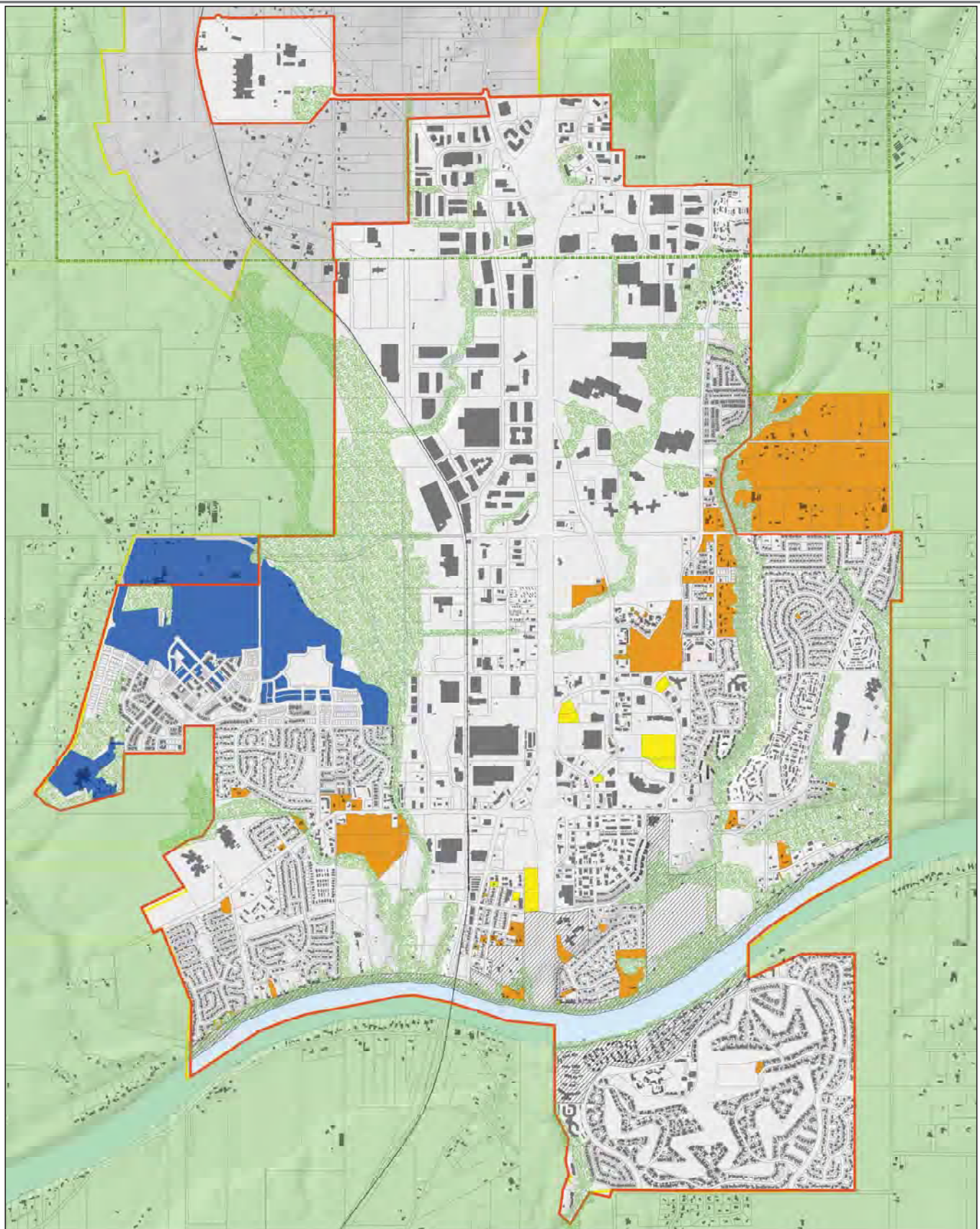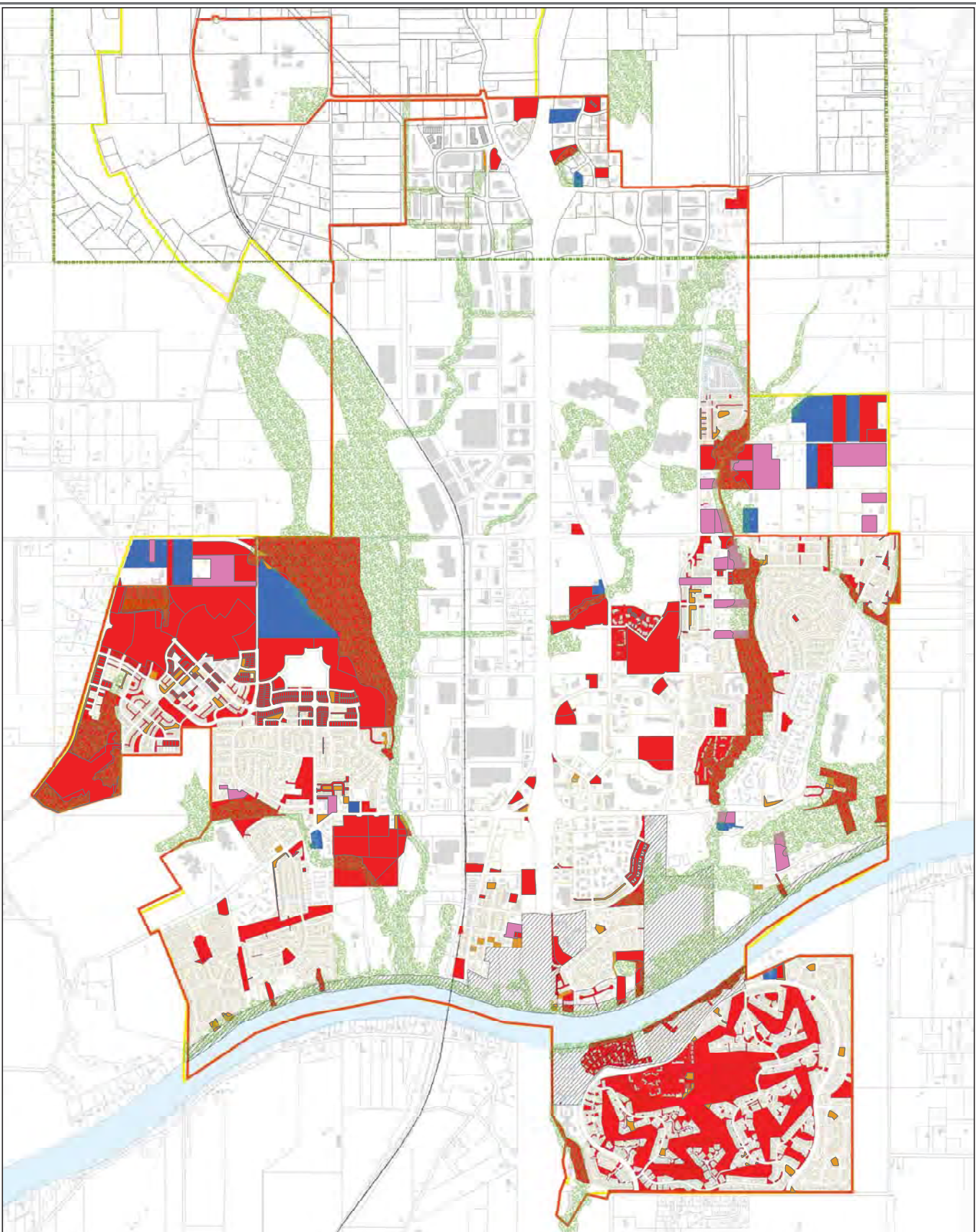
Buildable Residential Lands Inventory Map

Data from 2/2013, Map Created 5/2013

Vacant lots and land likely to redevelop 🟢 SROZ

Comprehensive Plan

🟨 Commercial

🟧 Residential

🟦 Village

▨ Willamette River Greenway

✦✦ County Boundary

⬜ City Limits

⬜ UGB

WILSONVILLE GIS Geographic Information Systems

Mile
0   0.5

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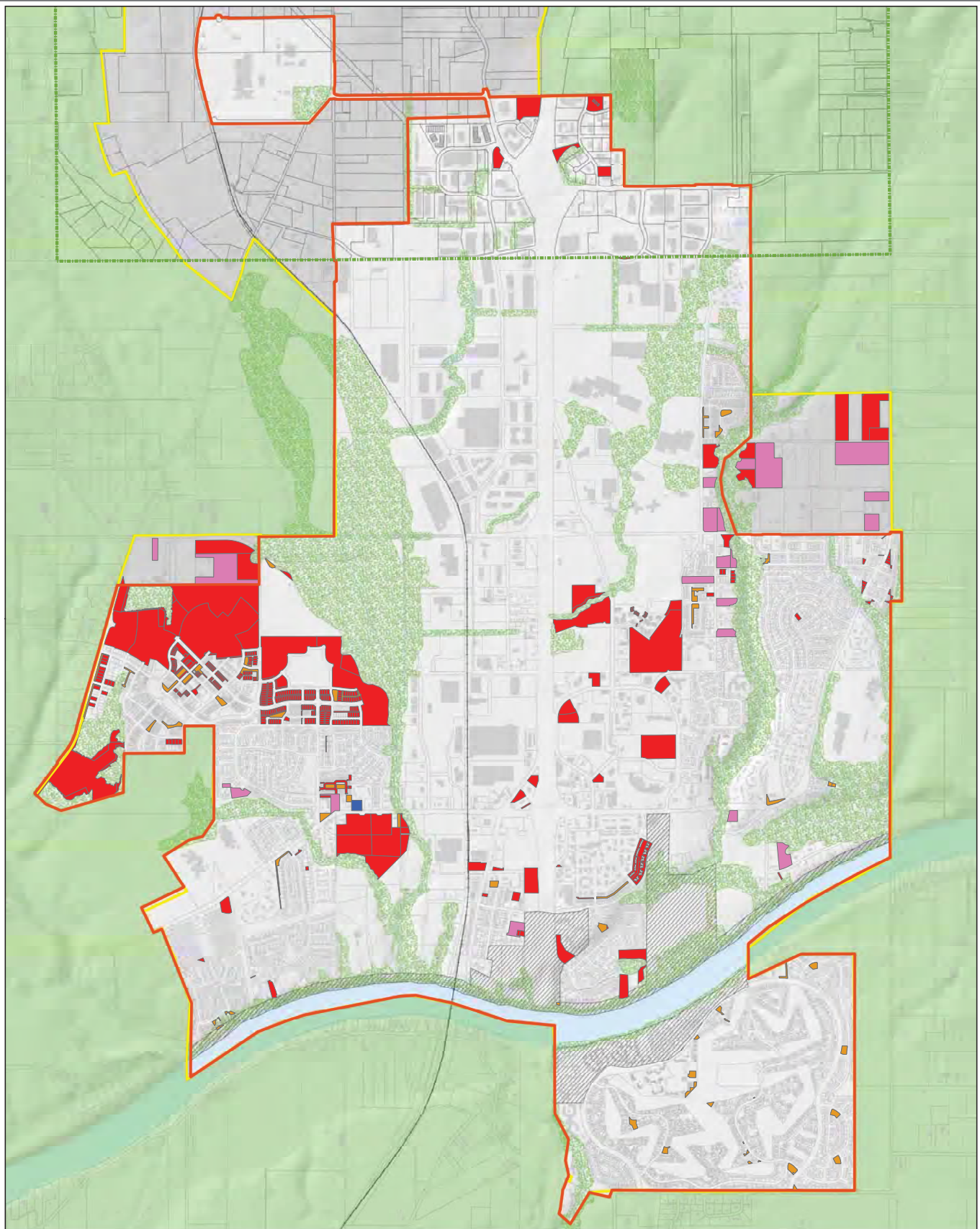
Buildable Residential Lands Working Map 1

All sites that are over 1 acre with improvement values between $100,001-$150,000   Building Footpirnts

All sites that are over 0.6 acres with improvement values between $50,001- $100,000   County Boundary

All sites that are 0.26-0.5 acres with improvement values less than $50,000   City Limits

All taxlots with building value of 0 (zero)   UGB

Taxlots - All R and C Comp Plan

SROZ

Willamette River Greenway

DRAFT

WILSONVILLE

GIS
Geographic
Information
Systems

Mile
0   0.5

Buildable Residential Lands Working Map 2

DRAFT

This version displays taxlots from model selection criteria, after removing SROZ and HOA lots, and public land.

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Geographic
Information
Systems

Legend:

- SROZ
- Willamette River Greenway
- County Boundary
- City Limits
- UGB
- All taxlots with building value of 0 (zero)
- All sites that are 0.26-0.5 acres with improvement values less than $50,000
- All sites that are over 0.6 acres with improvement values between $50,001- $100,000
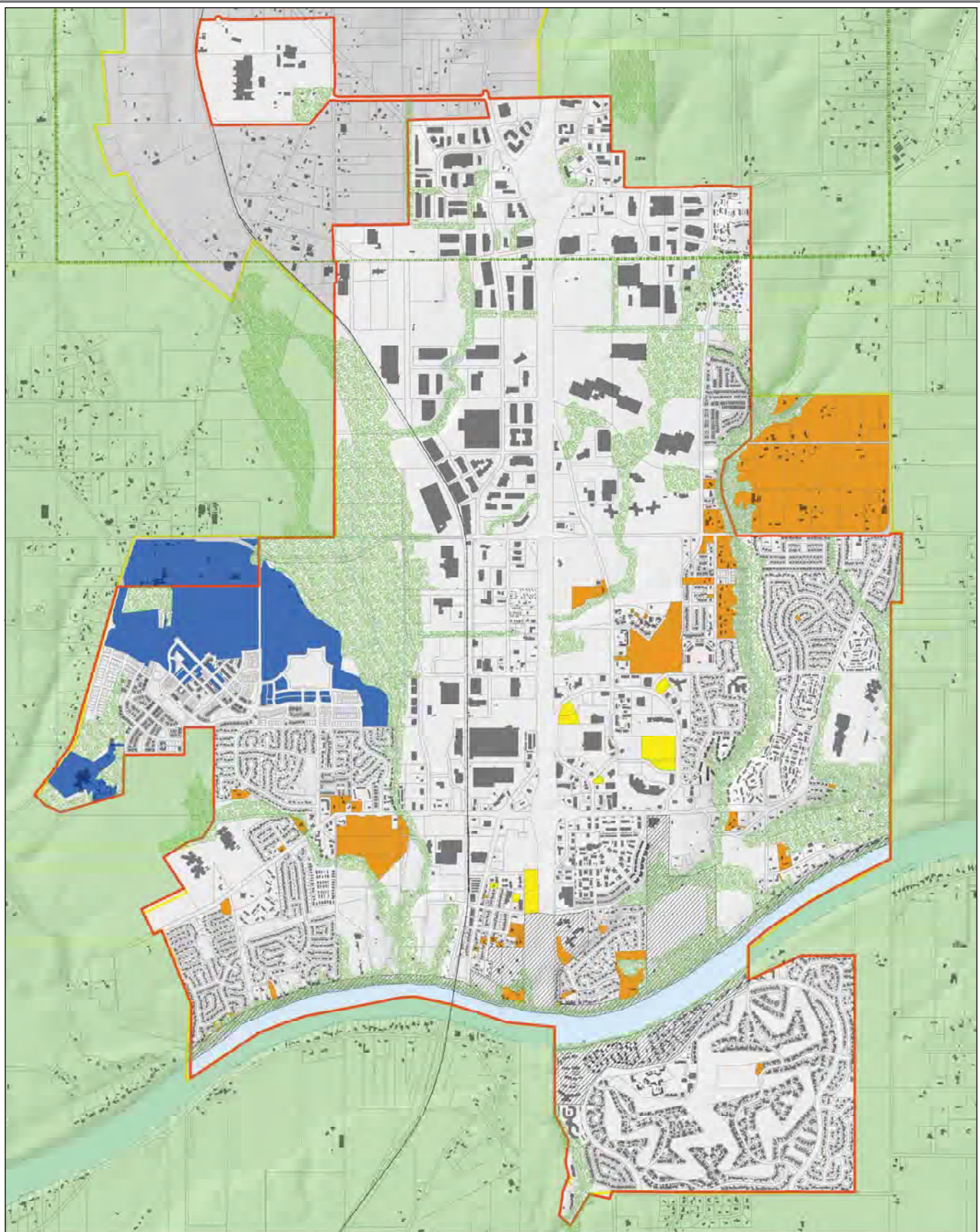- All sites that are over 1 acre with improvement values between $100,001-$150,000

Mile
0   0.5

Disclaimer: The City of Wilsonville makes no representations, express or implied, as to the accuracy, completeness and timeliness of the information displayed. Data errors and omissions may exist in map and report. This map is not suitable for legal, engineering, or surveying purposes. Please contact the City of Wilsonville Planning Department to verify report information is complete and accurate.

Buildable Residential Lands Working Map 3

DRAFT This version displays all taxlots after staff review

WILSONVILLE GIS Geographic Information Systems

Vacant lots and land likely to redevelop SROZ

Comprehensive Plan

- Commercial
- Residential
- Village

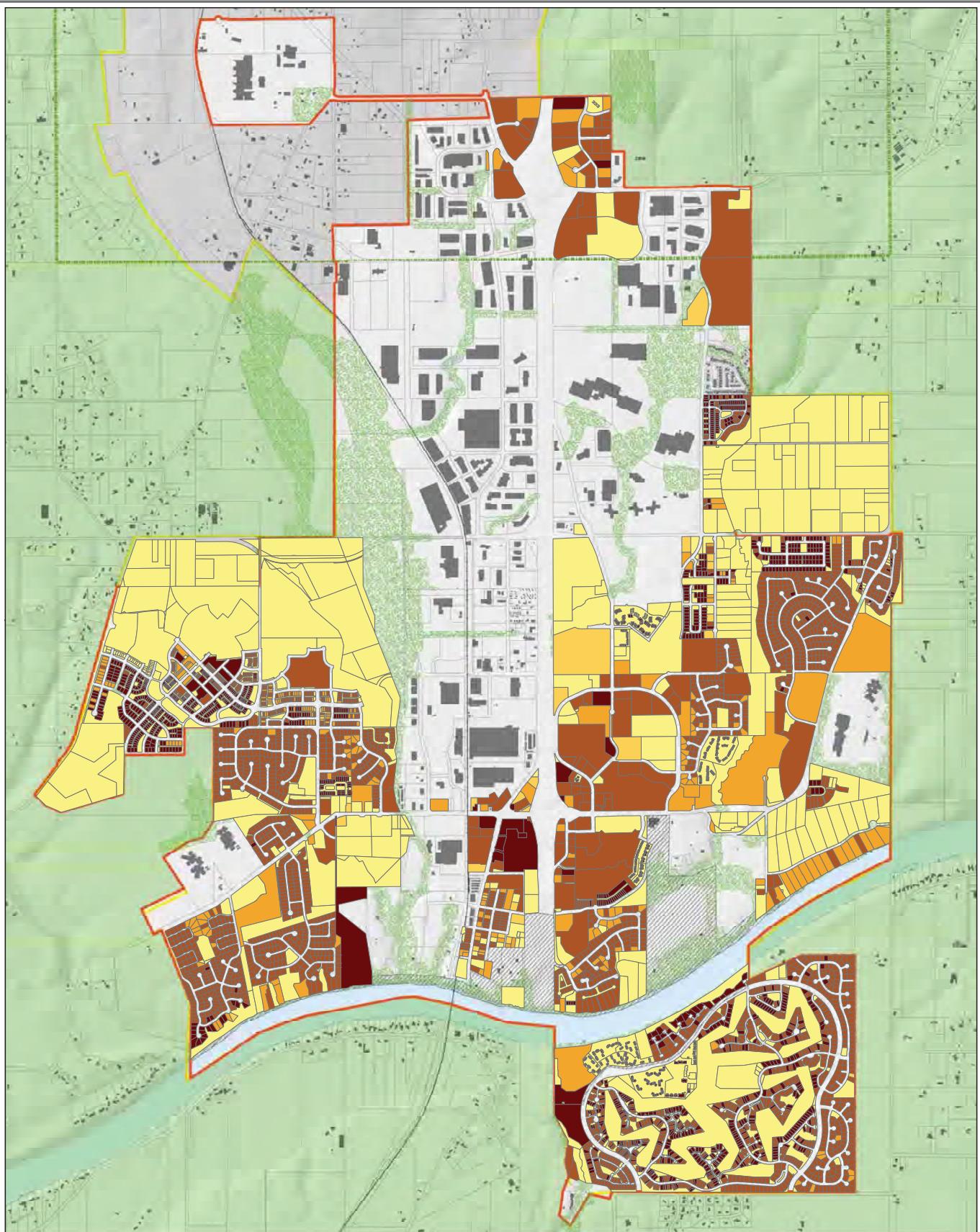Willamette River Greenway
County Boundary
City Limits
UGB

0   0.5 Mile

Disclaimer: The City of Wilsonville makes no representations, express or implied, as to the accuracy, completeness and timeliness of the information displayed. Data errors and omissions may exist in map and report. This map is not suitable for legal, engineering, or surveying purposes. Please contact the City of Wilsonville Planning Department to verify report information is complete and accurate.

Taxlot ID	Address	Redevelopment Indicators Met				Improvement / Land value is less than 1	Strike Price is less than $10/ sf	Notes	Remove from inventory?
		Improvement Value is low relative to lot size (see methodology)	Underbuilt: Site is <50% of zoned capacity	Zoning: Site is planned for development but still in the RAH holding zone	Size of Lot: parcel is either 2 x the minimum lot size of the zone, or >2 acres if zoned RAH				
31W13BA05000	28325 SW CANYON CREEK RD S	X		X	X	X	X	Large dividable lot, surrounded by newly redeveloped neighborhood.	
31W14C 00800	10475 SW WILSONVILLE RD	X		X	X	X	X	Large dividable lot, adjacent to similar lot. Infill is possible without removing existing house.	
31W14C 01200	10365 SW WILSONVILLE RD	X		X	X	X	X	Large dividable lot, adjacent to similar lot. Infill is possible without removing existing house.	
31W15DC05100	29786 SW LEHAN CT				X		X	Large dividable lot. Improvement/ land value ratio is 1.1, but infill is possible without removing existing house.	
31W23AC00400	30820 SW FIR AVE	X			X	X	X	large lot; development has been proposed in the past	
31W23AC00600	9150 SW 4TH ST	X		X		X	X	adjacent to I-5. Construction of one SF house underway May 2013 via DB13-0002 .	
31W23AC00700	9180 SW 4TH ST	X		X		X		Construction of one SF house underway May 2013 via DB13-0002 .	
31W22AB00200	32060 SW GUISS WAY	X				X	X	Lot fronts on Wilsonville Rd	
31W23AC01200	30955 SW FIR AVE	X			X		X	Land division may require removing existing building. 11 units proposed for land use permit a few years ago.	
31W23AC01400	30900 SW MAGNOLIA AVE	X		X			X	Manufactured home.	
31W23AC05600	30935 SW MAGNOLIA AVE	X		X				Lot in Old Town neighborhood developed with single family manufactured home. Lot is not adjacent to redevelopable parcels, and shape of lot makes it unlikely to be divided.	yes
31W23DA00100	NO SITUS	X			X			Dividable lot in a neighborhood, occupied by barn.	
31W23DB00700	30990 SW BOONES FERRY RD	X		X				Lot in Old Town neighborhood developed with single family manufactured home. Lot is not adjacent to redevelopable parcels, and shape of lot makes it unlikely to be divided.	yes
31W23DB01200	9400 SW TAUCHMAN ST			X	X		X	Unoccupied mobile home park, for sale	
31W24 00850	8455 SW METOLIUS LN	X			X			Very large lot fronting on Willamette. Application for development of 33 units approved in 2008 (DB07-0073). Application for final plat pending approval in 2013.	
31W24 00900	8455 SW METOLIUS LN		X		X			Very large lot fronting on Willamette. Application for development of 33 units approved in 2008 (DB07-0073). Application for final plat pending approval in 2013.	
31W12D 03001	27650 SW CANYON CREEK RD N	X		X	X		X	large lot, dividable, constrianed by SROZ	
31W12D 03200	27960 SW CANYON CREEK RD N	X		X	X		X	large lot, dividable, constrianed by SROZ	
31W12D 03300	7727 SW BOECKMAN RD	X		X	X		X	large lot, dividable, constrianed by SROZ	
31W13B 00101	28130 SW CANYON CREEK RD S	X		X	X		X	large lot, dividable, constrianed by SROZ	
31W24A 00600	7305 SW MONTGOMERY WAY	X		X	X			large lot, dividable, constrianed by SROZ	
31W13B 00302	28200 SW CANYON CREEK RD S	X		X	X		X	Similar nearby properties have recently been assembled and redeveloped.	

Taxlot ID	Address	Improvement Value is low relative to lot size (see methodology)	Underbuilt: Site is <50% of zoned capacity	Zoning: Site is planned for development but still in the RAH holding zone	Size of Lot: parcel is either 2 x the minimum lot size of the zone, or >2 acres if zoned RAH	Improvement / Land value is less than 1	Strike Price is less than $10/ sf	Notes	Remove from inventory?
				Redevelopment Indicators Met					
31W13B 00900	28500 SW CANYON CREEK RD S	x		x	x		x	Similar nearby properties have recently been assembled and redeveloped.	
31W13B 01300	28700 SW CANYON CREEK RD S	x		x	x	x	x	Similar nearby properties have recently been assembled and redeveloped.	
31W24A 03400	7535 SW SCHROEDER WAY	x		x	x	x		large lot dividable. Site access and SROZ will make redevelopment challenging. Site currently for sale with adj. lot.	
31W24A 03500	7525 SW SCHROEDER WAY	x		x	x	x	x	large lot dividable. Site access and SROZ will make redevelopment challenging. Site currently for sale with adj. lot.	
31W13B 00300	28160 SW CANYON CREEK RD S			x	x		x	Large dividable lot, adjacent to similar lots. Constrianed by SROZ. . Similar nearby properties have recently been assembled and redeveloped.	
31W13B 00301	28080 SW CANYON CREEK RD S			x	x			Large dividable lot, adjacent to similar lots. Constrianed by SROZ. Similar nearby properties have recently been assembled and redeveloped.	
31W13B 00700	28400 SW CANYON CREEK RD S			x	x		x	Large dividable lot, adjacent to similar lots. Constrianed by SROZ. Similar nearby properties have recently been assembled and redeveloped.	
31W13B 00800	28450 SW CANYON CREEK RD S			x	x		x	Large dividable lot, adjacent to similar lots. Constrianed by SROZ. Improvement/ land value ratio is 1.2. Similar nearby properties have recently been assembled and redeveloped.	
31W13B 01000	28530 SW CANYON CREEK RD S			x	x		x	Large dividable lot, adjacent to similar lots. Constrianed by SROZ. Improvement/ land value ratio is 1.10. Similar nearby properties have recently been assembled and redeveloped.	
31W13B 01100	28600 SW CANYON CREEK RD S			x	x	x	x	Large dividable lot, adjacent to similar lots. Constrianed by SROZ. Similar nearby properties have recently been assembled and redeveloped.	
31W13B 01200	28650 SW CANYON CREEK RD S			x	x	x	x	Large dividable lot, adjacent to similar lots. Constrianed by SROZ. Improvement/ land value ratio is 1.0. Similar nearby properties have recently been assembled and redeveloped.	
31W14C 00900	10455 SW WILSONVILLE RD			x	x		x	Strike price number is $6/sf ft (below the $10 threshold)	
31W22A 00300	10725 SW WILSONVILLE RD			x	x	x	x	Strike price number is $7/sf ft (below the $10 threshold)	

Buildable Residential Lands Working Map 4

DRAFT

This version displays "Strike Value"
(Improvement Value+Land Value) / SqFeet

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GIS
Geographic
Information
Systems

StrikeValue

- 0 - 10
- 11 - 12
- 13 - 20
- 21 - 50
- 51 - 5212

Mile
0   0.5