



REQUEST FOR COMMENTS

date mailed: 08/2025

Project Economic Opportunity Analysis
File no. CP-25-222
Applicant City of Medford
Agent n/a

To Referral agencies and departments
From Carla Angeli Paladino, Principal Planner, Long Range
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PROJECT DESCRIPTION

A legislative amendment to the Economic Element and Goals, Policies, and Implementation Strategies sections of the Medford Comprehensive Plan to incorporate the updated Economic Opportunity Analysis and related goals and policies.

REQUEST FOR COMMENTS

Attached are documents for your review. Please investigate and submit a written report setting forth any necessary conditions as required of your department/agency for approval to the Planning Department within ten working days.

If no comments are received within the 10-day review period, the Planning Department will assume that your department or agency has no comments.

If you have any questions, please contact the planner listed above. Thank you.

ATTACHMENTS

- A Draft Economic Opportunity Analysis
- B Draft Goals and Strategies

RECIPIENTS

This Request for Comments (file number CP-25-222) was sent to the following recipients:

<input checked="" type="checkbox"/> Building Department	<input checked="" type="checkbox"/> Avista Utilities	<input type="checkbox"/> Medford Irrigation District
<input checked="" type="checkbox"/> City Attorney – Garrett Ramsey	<input checked="" type="checkbox"/> Charter Communications	<input type="checkbox"/> Rogue River Valley Irrigation
<input checked="" type="checkbox"/> Engineering – Doug Burroughs	<input checked="" type="checkbox"/> Hunter Communication	<input type="checkbox"/> Talent Irrigation District
<input checked="" type="checkbox"/> Engineering – Mike Casper	<input checked="" type="checkbox"/> LS Networks of So. Oregon	<input type="checkbox"/> Medford School Dist. 549C
<input checked="" type="checkbox"/> Engineering – Karl MacNair	<input checked="" type="checkbox"/> Lumen (Centurylink)	<input type="checkbox"/> Phoenix School District 4
<input checked="" type="checkbox"/> Engineering – Jennifer Ingram	<input checked="" type="checkbox"/> Pacific Power & Light	<input type="checkbox"/> R.V. International Airport
<input checked="" type="checkbox"/> Fire Department	<input checked="" type="checkbox"/> Rogue Disposal	<input type="checkbox"/> OR Dept. of Aviation
<input checked="" type="checkbox"/> Parks & Recreation	<input type="checkbox"/> Rogue Valley Sewer Services	<input type="checkbox"/> Federal Aviation Admin.
<input checked="" type="checkbox"/> Police Department	<input checked="" type="checkbox"/> Rogue Valley Transportation District	<input type="checkbox"/> Fire District #2
<input checked="" type="checkbox"/> Water Commission	<input type="checkbox"/> US Post Office	<input type="checkbox"/> Fire District #3
<input checked="" type="checkbox"/> City Manager	<input type="checkbox"/> Jackson Co. Admin. Officer	<input checked="" type="checkbox"/> ODOT
<input type="checkbox"/> Floodplain – Liz Hamblin	<input type="checkbox"/> Jackson Co. Health	<input type="checkbox"/> ODOT Rail
<input checked="" type="checkbox"/> Urban Renewal (MURA)	<input type="checkbox"/> Jackson Co. Planning	<input type="checkbox"/> OR Dept. Fish & Wildlife
<input type="checkbox"/> Alt Trans Advis Comm (ATAC)	<input type="checkbox"/> Jackson Co. Roads & Parks	<input type="checkbox"/> Army Corps of Engineers
<input checked="" type="checkbox"/> DLCD – Josh LeBombard	<input type="checkbox"/> Jackson Co. Surveyor	<input type="checkbox"/> Bear Creek Watershed Council
		Department of State Lands

A Land Development Committee meeting is scheduled for **Wednesday, August 27, 2025**, at 9:30 a.m. via Zoom webinar.

Topic: Land Development Meeting

Link to join the webinar: <https://us02web.zoom.us/j/83028661620>

Webinar ID: 830 2866 1620

City of Medford

Economic Opportunity Analysis

July 18, 2025

Prepared by:



Prepared for:



This project is funded (in part) by Oregon general fund dollars through the Department of Land Conservation and Development. The contents of this document do not necessarily reflect the views or policies of the State of Oregon.



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EXECUTIVE SUMMARY

This Economic Opportunities Analysis (EOA) updates Medford's previous EOA, completed in 2007. This state-prescribed document is a technical study that looks at economic trends and land supply to provide a reference about the alignment of long-term demand and supply for employment-zoned lands. The content of the EOA is Ruled by OAR 660-009-0015.

This EOA supports Medford's implementation of local economic development objectives and forms the basis for industrial and other employment development policies in the comprehensive plan.

Overall, the analysis finds that Medford has more than enough land to accommodate forecasted 20-year demand. While the city's total vacant buildable land supply has grown since 2007, due in part to a major UGB expansion, certain site types – particularly very small service commercial sites and small industrial parcels—remain in limited supply. Larger industrial sites are few and far between in Medford but represent a strategic asset for future development.

As of 2025, Medford is the largest community in the Rogue Valley region with a population of about 89,000 residents. The Rogue Valley, with approximately 311,600 residents across both Jackson and Josephine Counties, has seen fairly consistent population growth over the past 15 years, with growth slowing somewhat following 2020. Medford's annual growth rate was higher than other parts of the region from 2020-2023, with a Compound Annual Growth Rate (CAGR) of 0.7% (compared to -0.1% for the county and 0.6% in Ashland). A portion of the estimated population growth in Medford may be attributed to the resettling of residents who were displaced due to the Almeda Fire.

While the median household income in Medford (\$70,500 in 2023) is slightly lower than that of the region (\$71,400), it has been following regional trends and trending upwards (at a rate of 4.0-5.0% annually since 2010). However, as of 2021, more than half (52%) of Medford's households make less than 100% of the Area Median Income (AMI). Housing is also more affordable in Medford as compared to the county, with Medford showing a lower median home value (at \$387,000 in 2023 compared to Jackson County's \$400,200), though home prices vary across Medford's neighborhoods and some areas likely have median prices higher than the countywide median. Similarly, more housing is available for lower income earners in Medford than in Ashland, with 45% of Medford's housing stock affordable to those making 80% the local Area Median Income (AMI) or less, compared to 31% in Ashland. However, rising housing costs, combined with cost-of-living concerns at the national level, can still put pressure on some Medford households, and housing affordability remains an important concern to Medford's community.

Medford serves an important role within Jackson County as a diverse employment hub, anchored by a strategic location along Interstate-5 and the Rogue Valley International

Airport. Employment in Medford is spread across many different industries including, notably, health care, retail, accommodation and food services, construction, and manufacturing. Jobs have been up and down in Medford for the past few decades, resulting in net growth of 7,980 jobs over the past 10 years, or a CAGR of 1.7%. This growth has largely occurred within Medford's established health care, accommodation and food services, and construction industries. The Rogue Valley commute- and labor-sheds are very intertwined. As of 2022, Medford's workforce includes 51,749 people. Of these, 37% (19,387 individuals) both lived and worked in Medford, while the remaining 63% commuted in from other communities.

Employment in Medford is projected to grow by approximately 11,408 jobs between 2025 and 2045, with a CAGR of 1.0%.¹ Accommodating this growth will require development-ready sites are available to support new and expanding businesses, preventing job growth from shifting elsewhere in the region. Job growth will also intensify demand for local talent and workforce housing. Stakeholder engagement revealed that workforce shortages already affect key industries such as healthcare and skilled trades. Rising housing costs and lower levels of educational attainment may further challenge Medford's ability to attract and retain the talent needed to meet future employment demands. A clear economic vision—supported by coordinated planning across land use, housing, and workforce development—will be essential to attracting and guiding desired investment and realizing the benefits of employment growth.

Medford's forecasted economic growth translates to net demand of 604 vacant acres through 2045, of which 363 acres is designated for commercial uses and 261 for industrial. Analysis of Medford's buildable lands inventory reveals that there are more than 1,200 acres of vacant land available in Medford to accommodate this demand, including land zoned for industrial and commercial uses, exceeding what the City is projected to need over the 20-year period.

While overall supply exceeds projected needs, some parcels may be limited by size, location, or site readiness, which could constrain the ability to meet certain development opportunities as they emerge. In the commercial sector, very small sites under 0.5 acres in the Service Commercial zone are scarce, potentially limiting new small-scale service or retail businesses that rely on smaller footprints. In the industrial sector, there is limited availability of small-to-mid-sized industrial sites in the 1 to 5 acre range, which are often in demand for smaller manufacturers, contractors, and local-serving industrial users. In addition, not all sites may be immediately development-ready, with some subject to infrastructure limitations or site-specific constraints that affect short-term availability. Based on an evaluation of short-term development readiness, approximately 1,130 acres of employment land meet key infrastructure and site feasibility criteria, representing roughly 20% of the city's total employment land supply—slightly below the state's 25% target for competitive short-term supply. Increasing short-term supply would require that the city provide adequate

¹ This rate is based on a regional employment forecast provided by the State of Oregon, with modifications to apply the regional forecast to Medford's local economy.

infrastructure to otherwise developable parcels that are not currently served, and evaluating the ROI of doing so on a site-by-site basis may help to ensure wise use of available resources. It is recommended that a policy or policies be incorporated into the updated economic development element aimed at increasing the suitability of the city's competitive short term supply of employment land available to support growth and increasing it to 25% of total buildable supply; alternatively, the City may opt to adopt a lesser target if it deems current short term supply adequate to fulfill its vision for economic development in the near term.

Strategic Themes

This EOA was informed by an extensive engagement process which leveraged findings from data analysis to facilitate discussions with local community and stakeholders. Looking strategically towards the future, the strategic themes given below reflect the community's economic development priorities combined with insights on Medford's economic strengths and weaknesses described in the quantitative analysis.

Downtown as an Anchor of Economic Identity. Investments in catalytic mixed-use developments downtown, such as a conference center with residential and retail components, is seen as an important strategy to revitalize underutilized spaces and attract investment. Local leaders emphasize the importance of residential density to support downtown vibrancy.

Addressing Workforce Gaps and Talent Retention. Employers in healthcare and skilled trades face persistent shortages; Opportunities to fill these gaps may include expanding local nursing cohorts and supporting medical residency programs. Childcare access and local housing costs are important considerations to improve talent retention, particularly for dual-income households and early-career professionals.

Tapping into Medford's Gateway Potential. Medford lacks memorable entry corridors; Branding Medford as more than a pass-through — with stronger wayfinding, signage, and visual identity could also include beautifying Riverside Avenue and Biddle Road, improving the Central Avenue and Riverside Road corridor, and improving the Bear Creek Greenway as a gateway feature.

Building Toward a Unified and Forward-Looking Economic Vision. Medford lacks a clear economic identity, suggesting the need for Medford to articulate its vision (e.g., medical hub, tech bridge, sports city). A shared regional narrative could better align efforts across SOREDI, the city, higher ed, and private developers, reducing duplication and building broader civic buy-in.

Responding to Housing and Affordability Challenges. Middle-income and workforce housing is needed near downtown; public land, incentives, and Bear Creek-oriented development could act as strategic levers. Downtown condo development is constrained by construction liability laws, with local officials advocating for state-level reform to enable ownership-oriented housing options.

Advancing Health and Recreation as Economic Strengths. Medford’s healthcare sector is seen as a regional anchor; expanding partnerships with OHSU and bringing medical training campuses to Medford is a long-term goal. The city’s investment in sports tourism assets (e.g., Rogue X, Lithia & Driveway Fields) is generating increasing demand; stakeholders suggested destination hotels and food amenities to extend visitor stays.

Removing Barriers and Unlocking Development Potential. Increasing the amount and suitability of the city’s competitive short-term land supply is an important way to support future economic growth. While the state recommended target for short-term land supply is 25% of total buildable supply, Medford may opt to adopt a lesser target based on the findings of this EOA. Strategic opportunities under this theme may include upgrading infrastructure for key parcels and opportunity parcels and further building up Medford’s reputation for being “open for business.”

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INTRODUCTION

Background and Purpose

The City of Medford requires an Economic Opportunity Analysis (EOA) as intended and funded by the Oregon Department of Land Conservation and Development (DLCD). As a strategic planning document, the EOA ensures that there is enough available land and adequate public improvements to accommodate anticipated economic growth for the next 20 years. This requirement is based on the State of Oregon's Land Use program, established by Senate Bill 100 in 1973, which established the Land Conservation and Development Commission (LCDC) and the Oregon Department of Land Conservation and Development (DLCD) and mandated that Statewide Planning Goals serve as the basis for local Comprehensive Plans. This EOA meets a critical element of State Planning Goal Nine, which requires local governments to ensure adequate land is zoned for industrial and commercial activities that support economic growth, sustain living wage jobs, and maintain quality of life within established urban growth boundaries.

As the largest city in Jackson County, Medford is a leader in the region's economy. Medford is home to several regional institutions such as the Craterian Theater, Holly Theatre, Asante and Providence Medical Centers, and the Rogue Valley International Medford Airport, all of which support local employment and civic life. Local wineries, Lithia & Driveway Fields, Mt. Ashland, and plentiful outdoor recreation provide a variety of activities for locals and visitors alike. Through this update of Medford's EOA, the city is working to align projected employment growth with land needs and availability based on current data and extensive community engagement.

Economic Opportunity Assessment Requirements

An Economic Opportunity Assessment (EOA), as outlined in [OAR 660-009- 0015](#), is a technical study that compares projected demand for land for industrial and other employment uses to the existing supply of such land. It helps communities implement their local economic development objectives and forms the basis for industrial and other employment development policies in the comprehensive plan.

This rule requires inclusion of the following four interrelated elements:

1. Review of national, state, regional, county and local trends.
2. Identification of required site types expected to be needed to accommodate the expected employment growth
3. Inventory of industrial and other employment lands
4. Assessment of community economic development potential
5. There is also an optional fifth item, which is a strong encouragement for the EOA process to also include, or go in conjunction with, a visioning or some other public input based process.

Each of these five items are covered throughout this EOA report, either as stand alone sections or integrated into multiple sections.

Methods

This EOA integrates qualitative and quantitative data collection and analysis to meet the requirements outlined in OAR 660-009-0015. Qualitative findings are informed by community engagement feedback and activities, including:

- Interviews
- Focus groups
- A Public Open House
- A Regional Survey of businesses and residents

Quantitative analysis draws from publicly available data sources, such as the U.S. Census Bureau, Oregon Employment Department and many others; as well as private sector vendor sources such as Placer.ai, Esri, Costar, and others. All data are sourced and referenced throughout the report.

Organization of Report

- **Overview of Existing Conditions in Medford.** Describes the geographic setting of Medford as well as outlines basic population, housing and land use information.
- **National, State, and Regional Economic Trends.** Describes contextual information on the larger economies affecting Medford.
- **Local Economic Characteristics and Trends.** Explores targeted employment, industry, workforce, and market data on Medford and Jackson County.
- **Employment Lands Assessment.** Summarizes key findings from Medford's commercial and industrial buildable lands inventory.
- **Community Economic Development Priorities.** Distills findings from stakeholder engagement.
- **Employment Lands Sufficiency.** Details land needed to accommodate local expressions of economic development trends using employment forecasts and economic development potential.
- **Strategic Themes and Implications for Policy.** Synthesizes strategic themes from data collection and analysis, and refreshes Medford's goals and policies for economic development.

OVERVIEW OF EXISTING CONDITIONS IN MEDFORD

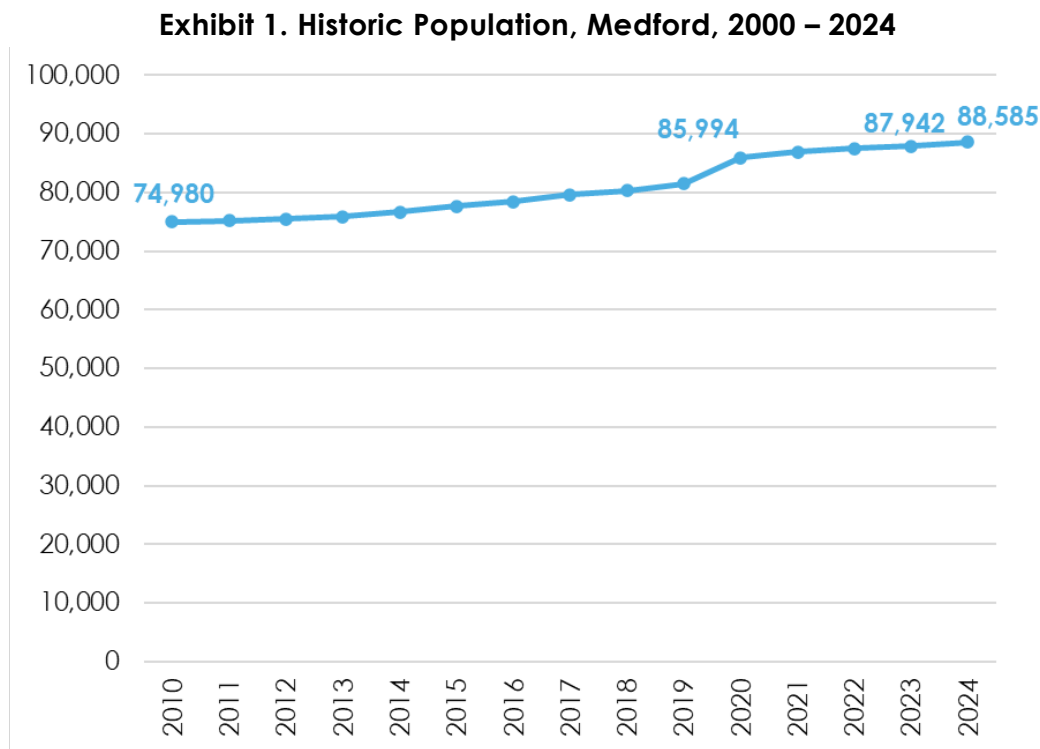
This section introduces the City of Medford including its geographic setting, position and role in the Rogue Valley, and recent trends in community demographics, housing, land uses, and climate.

People and Housing

Community Demographics

Regional demographic shifts, seen in Jackson County, Medford and Ashland, include a growing population, a slow increase in racial diversity in the population, and a growing proportion of seniors. As of 2022, this aging trend is more pronounced in Ashland than in Medford, while Ashland's population growth is less pronounced than Medford's.

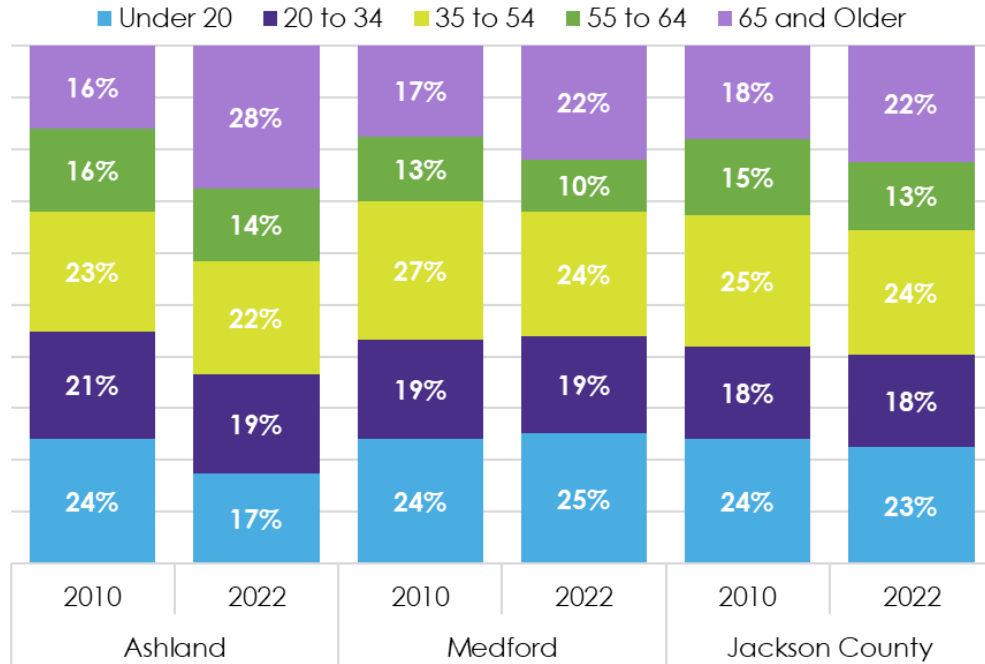
Exhibit 1 displays the population trend in Medford from 2010 to 2024. The population increased from 74,980 in 2010 to 88,585 in 2024, reflecting a general upward trend year-to-year. The compound (or average) annual growth rate from 2010-2019 was 0.9% while the compound annual growth rate from 2020-2024 was 0.7%.



Sources: State of Oregon, Population Research Center at Portland State University, 2010-2023; CAI, 2025.

In 2022, Jackson County's median age was 42 years old, while Medford's was 39.5 and Ashland's was 48.2. Medford saw the portion of the population aged 65 or older grow from 17% of the population in 2010 to almost 22% in 2022 (**Exhibit 2**).

Exhibit 2. Change in Age Distribution, Jackson County, Medford, and Ashland, 2010 and 2022



Sources: American Community Survey (ACS), 2010 & 2022, CAI 2024.²

While 83% of Medford's community identified as white only in 2010, this proportion decreased by 9% as of 2022. Jackson County and Ashland also both experienced an increase in racial diversity from 2010 to 2022 with Jackson County's white-only proportion decreasing by 6%, and Medford's by 4%. In all geographies the largest non-white racial cohort in 2022 identified as Hispanic and Latino, making up 18% of Medford's population and 14% of Jackson County's.

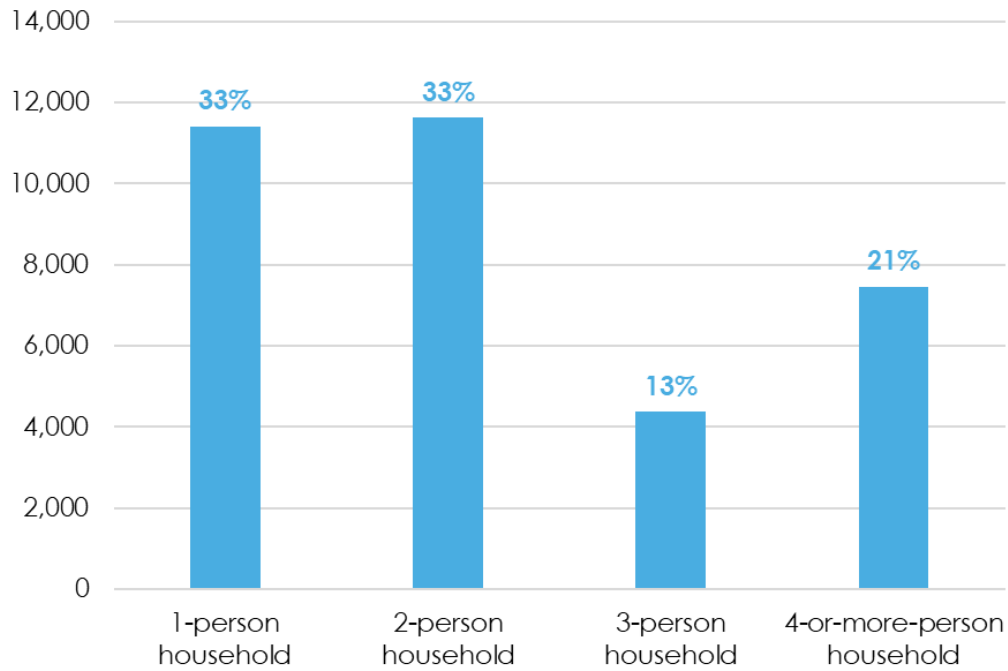
Characteristics of Medford's Households

In 2023, small households (or households made up of one or two people) accounted for two thirds of all households in Medford (**Exhibit 3**). Three-person households represented 13%, while households with four or more people made up 21% of the total. The average household size in Medford was 2.43 persons per household.

² The Census Bureau's ACS uses the "current residence" concept, meaning individuals are counted at the address where they live or stay most of the time. Following this, students are counted in these ways:

- a) Students living on-campus (e.g., in dormitories or residence halls) are counted at their campus address. These facilities are classified as group quarters.
- b) Students living off-campus (e.g., in rented apartments) are counted at their off-campus residence.
- c) Students living at their parents' or guardians' home while attending college are counted at that home address.

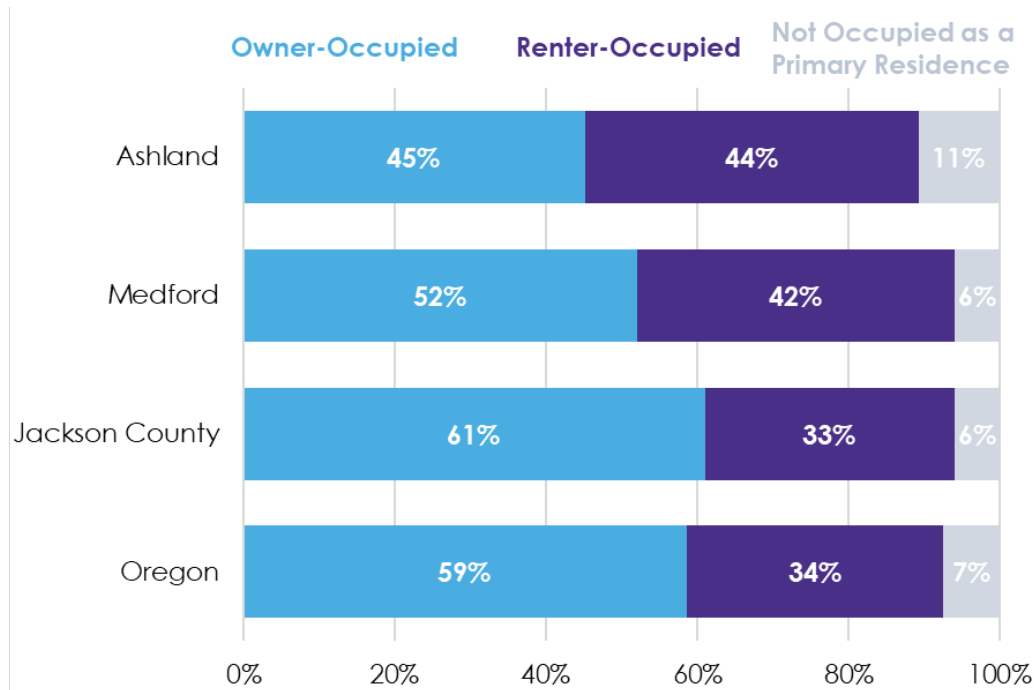
Exhibit 3. Household Size, Medford, 2023



Source: ACS 5-year Estimates, 2023; CAI, 2025.

The majority of households in Jackson County (61%) and the state of Oregon (59%) are owner-occupied in 2023 (**Exhibit 4**). Medford follows this trend, but shows a closer split between homeowners (52%) and renters (42%). The remaining 6% of units in Medford are those which are not occupied as a primary residence, including second homes, short term rentals, or otherwise vacant properties.

**Exhibit 4. Housing Tenure, Oregon, Jackson County,
Medford and Ashland, 2023**



Sources: American Community Survey, 2023; CAI 2024.

According to the American Community Surveys of the U.S. Census Bureau, Medford and Ashland’s median household incomes are lower than those of the county or the state, but median household income increased at similar rates for all four areas from 2010-2023. The median annual household income in Medford was about \$70,500 in 2023. This is comparable to Jackson County’s median income of \$71,400, and lower than Oregon’s median annual income of \$80,400.

For HUD CHAS data, the term “affordable housing” means that a household spends no more than 30% of its gross income on housing costs. Housing costs include rent or mortgage payments plus utilities. The Area Median Income (AMI), a commonly accepted metric created by the US Department of Housing and Urban Development (HUD) used for assessing housing affordability, is used to evaluate housing affordability and determine eligibility for subsidized housing. HUD sets income thresholds categorized as extremely low, very low, low, and median for households ranging from one to eight members. These income limits are specified only for particular metropolitan areas. **Exhibit 5** shows the 2021 and 2025 income limits by household size in the Medford Metro Area, which includes Medford, Ashland, and most of Jackson County. These metrics are used to understand the affordability of the existing housing stock in Medford. For 1 person in Jackson County, the AMI for 2021 is \$51,150 while low income is designated as \$38,300 or less. As of 2025, the median income for 1 person in Jackson County is \$64,700 while low income is designated as \$51,750 or less.

Exhibit 5. HUD Household Income Limits, Jackson County, 2021 & 2025

HUD Household Income Limits, Jackson County, 2021

Income Level	Household Size (Persons in Family)							
	1	2	3	4	5	6	7	8
Extremely Low (30% AMI)	\$14,350	\$17,420	\$21,960	\$26,500	\$31,040	\$35,580	\$40,120	\$44,660
Very Low Income (50% AMI)	\$23,950	\$27,350	\$30,750	\$34,150	\$36,900	\$39,650	\$42,350	\$45,100
Low Income (80% AMI)	\$38,300	\$43,750	\$49,200	\$54,650	\$59,050	\$63,400	\$67,800	\$72,150
Median Income	\$51,150	\$58,500	\$65,800	\$73,100	\$78,950	\$84,800	\$90,650	\$96,500

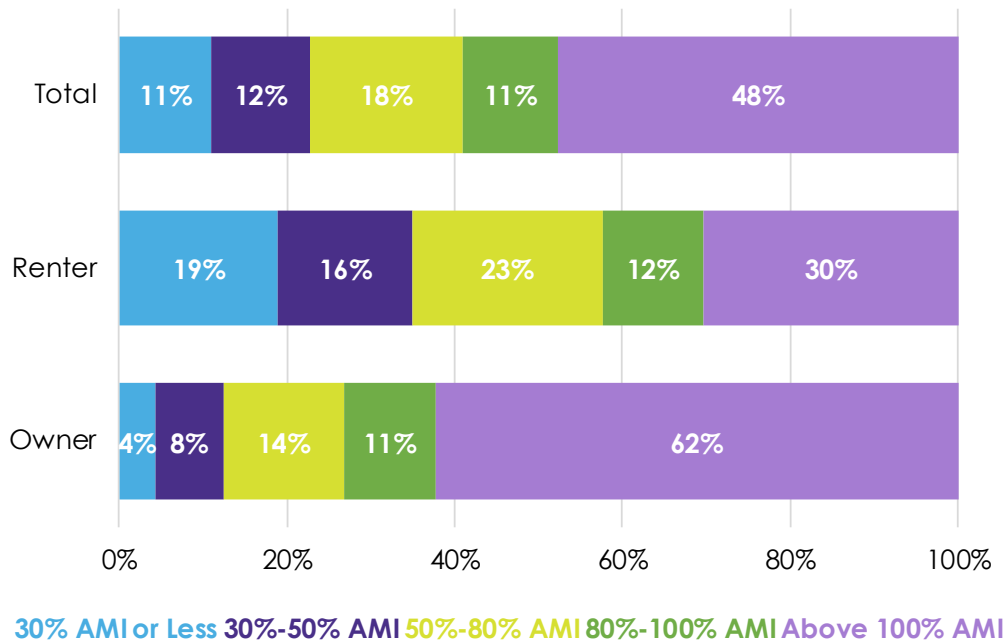
HUD Household Income Limits, Jackson County, 2025

Income Level	Household Size (Persons in Family)							
	1	2	3	4	5	6	7	8
Extremely Low (30% AMI)	\$19,400	\$22,200	\$26,650	\$32,150	\$37,650	\$43,150	\$48,650	\$54,150
Very Low Income (50% AMI)	\$32,350	\$37,000	\$41,600	\$46,200	\$49,900	\$53,600	\$57,300	\$61,000
Low Income (80% AMI)	\$51,750	\$59,150	\$66,550	\$73,900	\$79,850	\$85,750	\$91,650	\$97,550
Median Income	\$64,700	\$73,900	\$83,150	\$92,400	\$99,800	\$107,200	\$114,600	\$121,950

Sources: HUD, 2025; CAI, 2025.

When looking at HUD's household income by AMI, the value referenced is the Median Income for a household size of 4, which was \$73,100 for Medford in 2021. Overall, 48% of Medford's households made more than 100% of this 2021 Area Median Income (AMI) while 23% of households made less than 50% AMI (**Exhibit 6**). Renter households were more likely to fall within lower income categories, with only 30% of renter households making 100% AMI or higher; and 35% making less than 50% AMI. Owner households tend to have higher incomes, with 62% earning above 100% AMI.

Exhibit 6. Household Income by AMI, Medford, 2021



Source(s): CHAS 2017-2021; CAI 2025.

Cost burdened refers to a household that spends more than 30% of its income on housing costs, including rent or mortgage payments and utilities.

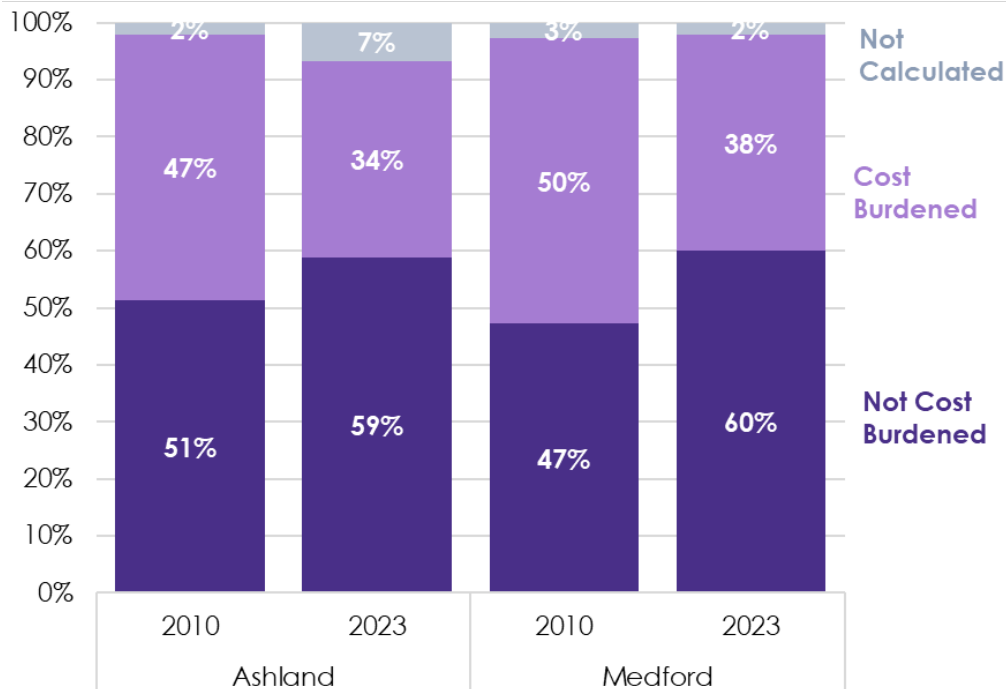
Since 2010, Oregon, Jackson County, Medford and Ashland have all seen household income increase while cost burden due to housing decreased. As of 2023, at least 38% of households in Medford are experiencing cost burden due to housing (**Exhibit 7**). "Not calculated" means that the cost burden percentage could not be calculated for those housing units due to missing or unreliable income or housing cost data.³ This value may be impacted by senior households who own their homes outright or report limited income by making affordability ratios difficult to calculate.

Renters face higher rates of cost burden than homeowners. As of 2023, 56% of renting households in Medford experienced cost burden compared to 25% of households which own their home (**Exhibit 8**).⁴

³ "Not Calculated" category includes units where reported income was \$0 (as this makes cost ratios unreliable), unusual or inconsistent values triggered data suppression to preserve accuracy, or the unit was occupied without payment of rent or mortgage.

⁴ "Not computed" values are often higher among renters because: Income is more likely to be unreported, unstable, or very low, rent-free arrangements are more common, and housing and financial data may be less reliably reported

Exhibit 7. Housing Cost Burden, Medford and Ashland, 2010 & 2023



Sources: American Community Survey, 2010 & 2023; CAI 2024.

Exhibit 8. Change in Cost Burdened Households by Tenure, Medford and Ashland, 2010-2023

	2010	2019	2021	2023
Ashland				
Cost Burdened Homeowners	34%	30%	26%	21%
Cost Burdened Renters	63%	59%	55%	55%
Medford				
Cost Burdened Homeowners	39%	28%	27%	25%
Cost Burdened Renters	67%	56%	54%	56%

Sources: American Community Survey, 2010-2023; CAI 2024.

Housing in Medford

The majority of homes in Medford (64%) are single family homes (one detached unit in structure), accounting for 23,279 units out of a total of 36,436 (**Exhibit 9**). Mobile homes also account for just over 1,000, while alternative housing (boats, RVs, vans, etc.) account for just 39 units. While individuals are permitted in Medford to sleep overnight in a vehicle (with permission from respective public or private property owners, pursuant to other regulations), it does not appear that any approved overnight lots are in operation in Medford.

Exhibit 9. Housing Units by Structure Size, Medford, 2023

Structure Size/Type	Count	% of Total
1 Detached Unit in Structure	23,279	64%
1 Attached Unit in Structure	1,626	4%
2 Units in Structure	1,481	4%
3 to 4 Units in Structure	2,694	7%
5 to 9 Units in Structure	2,223	6%
10 to 19 Units in Structure	774	2%
20 to 49 Units in Structure	596	2%
50 or More Units in Structure	2,639	7%
Mobile Homes	1,085	3%
Boat, RV, Van, Etc	39	0%
Total Units	36,436	

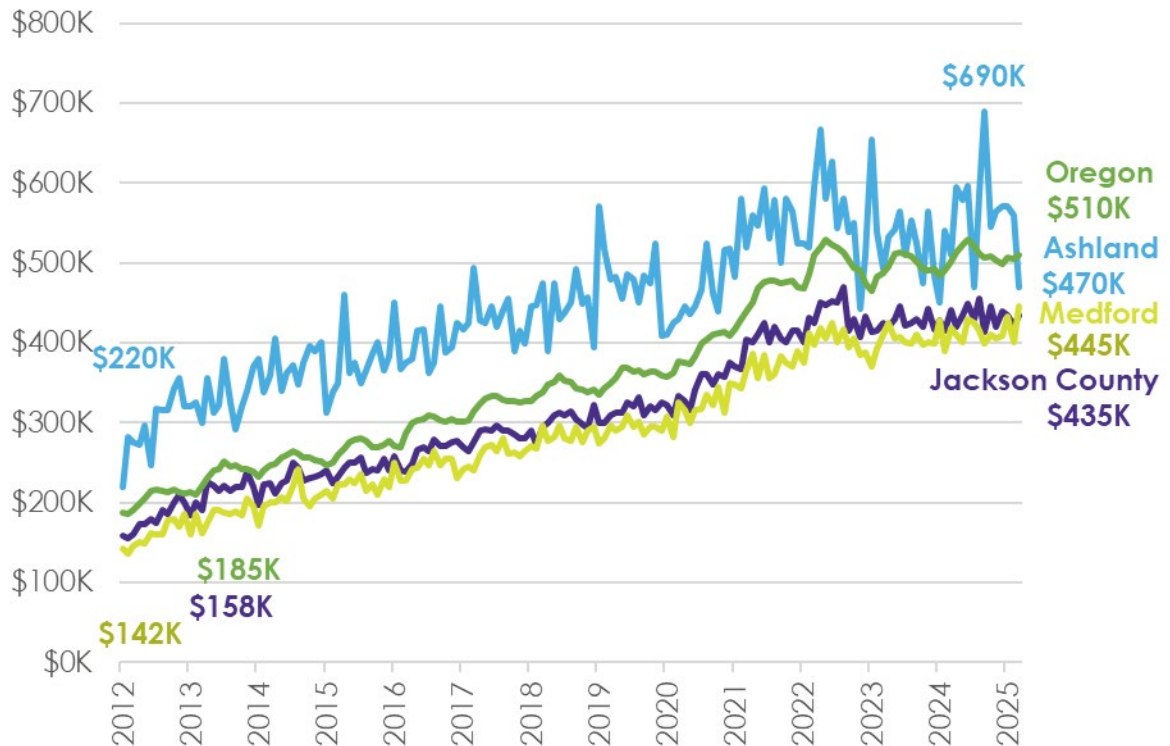
Sources: ACS 5-Year Estimates, 2023; CAI, 2024.

Note: 'Count' refers to the number of total units, not the number of structures.

Note 2: According to ACS definitions, units in independent living facilities are included in the above counts if the units are independently accessible and not served by skilled nursing.

Median home sale prices (**Exhibit 10**) have increased steadily across all geographies—Medford, Ashland, Jackson County, and Oregon—since 2012. Historically, Medford has maintained a lower median home price compared to Jackson County, the state overall, and Ashland. However, as of March 2025, Medford's median home sale price rose slightly to \$445,000, just surpassing that of Jackson County (\$435,000), and remaining lower than both Ashland's (\$470,000) and Oregon's (\$510,000).

Exhibit 10. Median Home Sale Price, Ashland, Medford, Jackson County and Oregon, Jan 2012 – March 2025

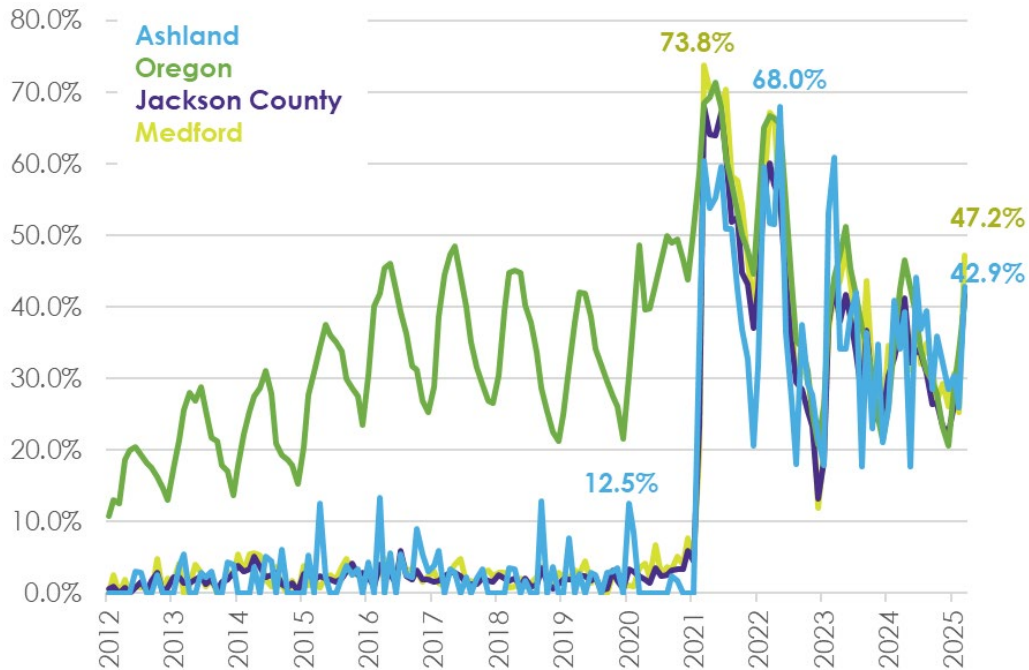


Sources: Redfin, 2025; CAI, 2025.

The number of housing units off the market within 2 weeks is an indicator which helps illustrate the pace and competitiveness of the local housing market by tracking how quickly homes are sold after being listed.

The share of homes sold within two weeks of listing remained relatively low and stable across all areas until 2020, with Medford, Ashland, and Jackson County's values fluctuating between 0%-13% while Oregon's were higher, fluctuating from 10% - 50% (**Exhibit 11**). By 2021, this indicator spiked sharply in all geographies, such that in Medford 73.8% of listings were removed within two weeks, with slightly smaller values shown for Oregon and Jackson County. These elevated levels suggest a period of intense housing demand and rapid turnover, consistent with broader pandemic-era housing trends. Since then, the rate of quick sales has declined somewhat but remains elevated compared to pre-2020 levels. By March of 2025, 47.2% of all of Medford's new listings came off the market within 2 weeks.

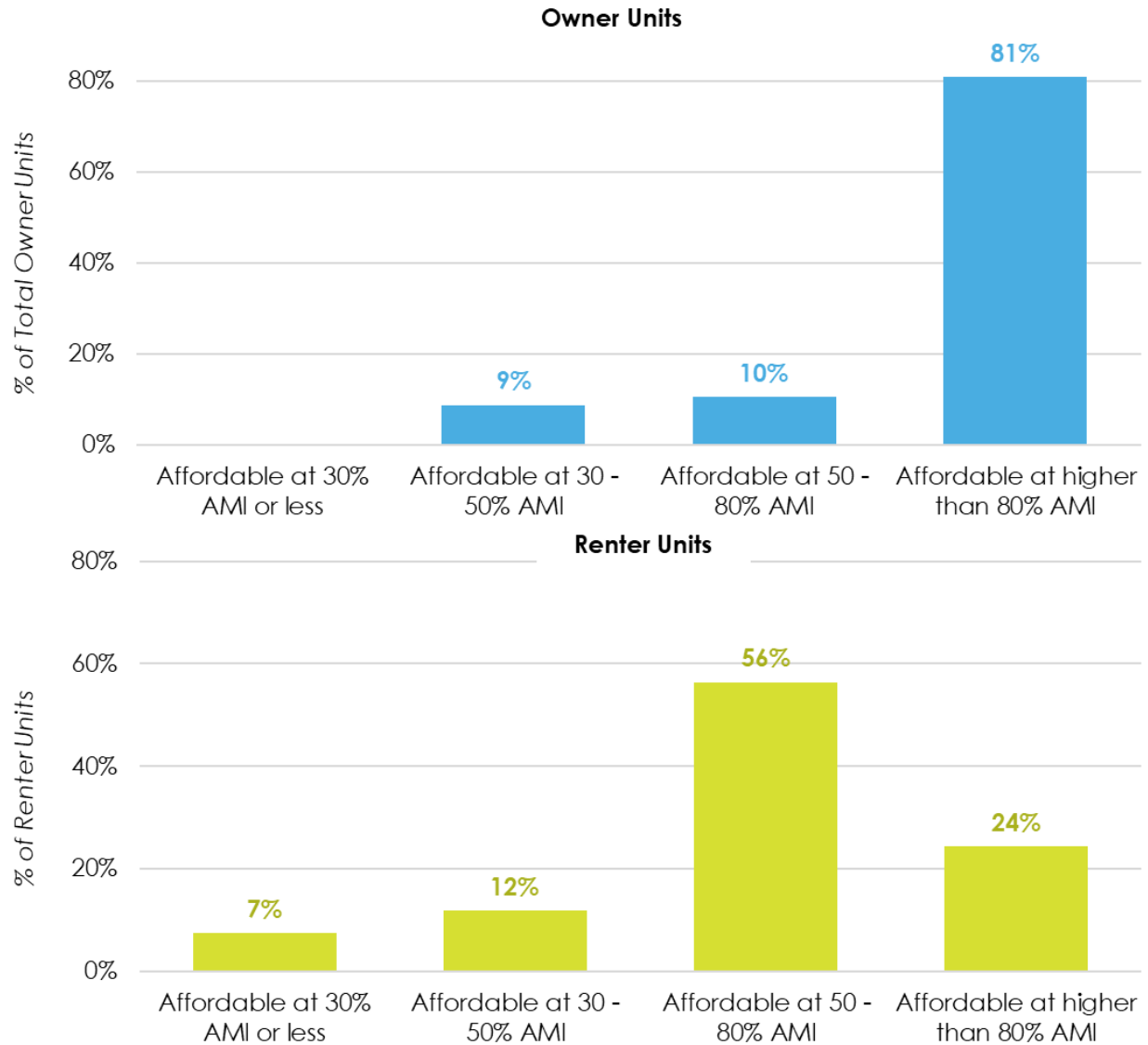
Exhibit 11. Housing Units off the Market within 2 Weeks of Listing, Medford, Ashland, Jackson County and Oregon, Jan 2012 – March 2025



Sources: Redfin, 2025; CAI, 2025.

Exhibit 12 shows the availability of Medford’s housing stock at various levels of affordability. 81% of owner-occupied housing in Medford is only available for households making 80% AMI or higher. Renter-occupied units, however, show some (7%) housing options affordable for households making less than 30% AMI, another 12% of units available at the 30%-50% AMI range, and 56% of units available at 50% - 80% AMI.

Exhibit 12. Housing Units Available at AMI Levels

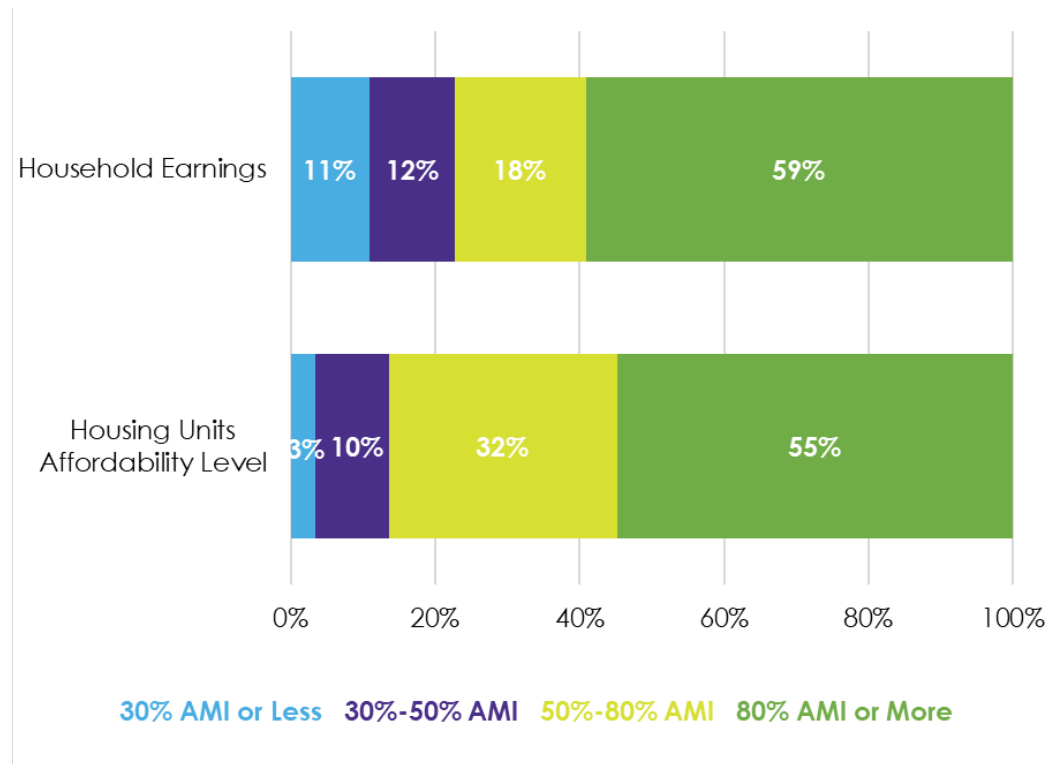


Source(s): CHAS 2017-2021; CAI 2025.

Exhibit 13 compares the distribution of households by AMI level to the total number of housing units available at that same income level in Medford. While 23% of Medford's households earn less than 50% AMI, only 13% of Medford's housing stock is affordable

at that income level. Medford has more housing units affordable at 50% - 80% AMI than there are households that earn incomes at those levels.

Exhibit 13. Household income by AMI compared to Housing units available by AMI

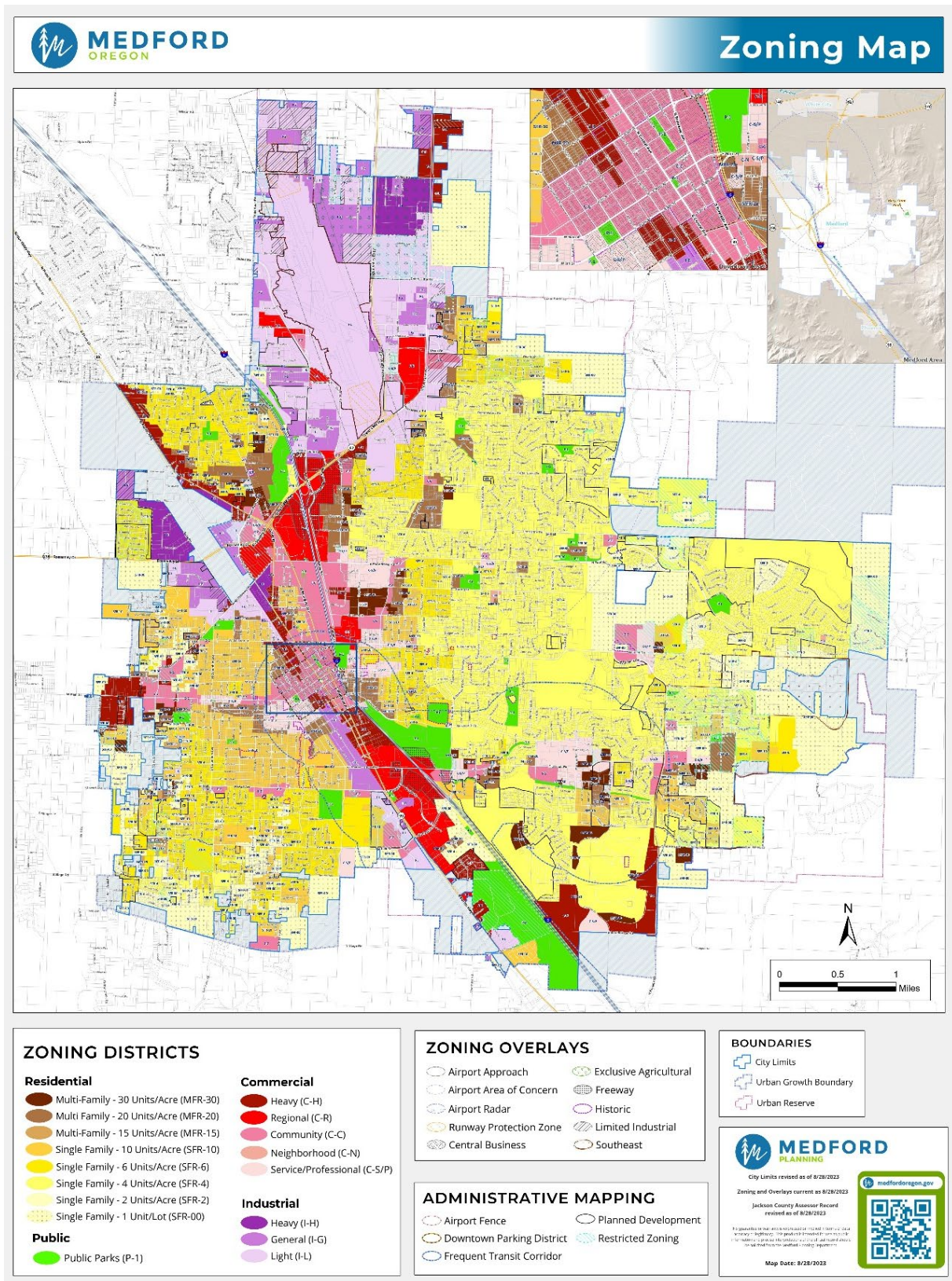


Source(s): CHAS 2017-2021; CAI 2025.

Local Land Use Setting

Medford's zoning and land use patterns reveal insights into the distribution of employment-focused land, the intensity of its use, and potential constraints that zoning regulations may pose for future employment development. The zoning map below (**Exhibit 14**) shows that a large proportion of land in Medford is allocated for low-density residential uses. It also highlights concentrations of commercial and industrial uses along Interstate 5 and major transportation corridors, aligning with Medford's role as a regional economic hub. Much of the industrial land in Medford is clustered in the north and along the northern and central I-5 corridor, with constraints posed by existing infrastructure, zoning restrictions, and adjacency to residential areas.

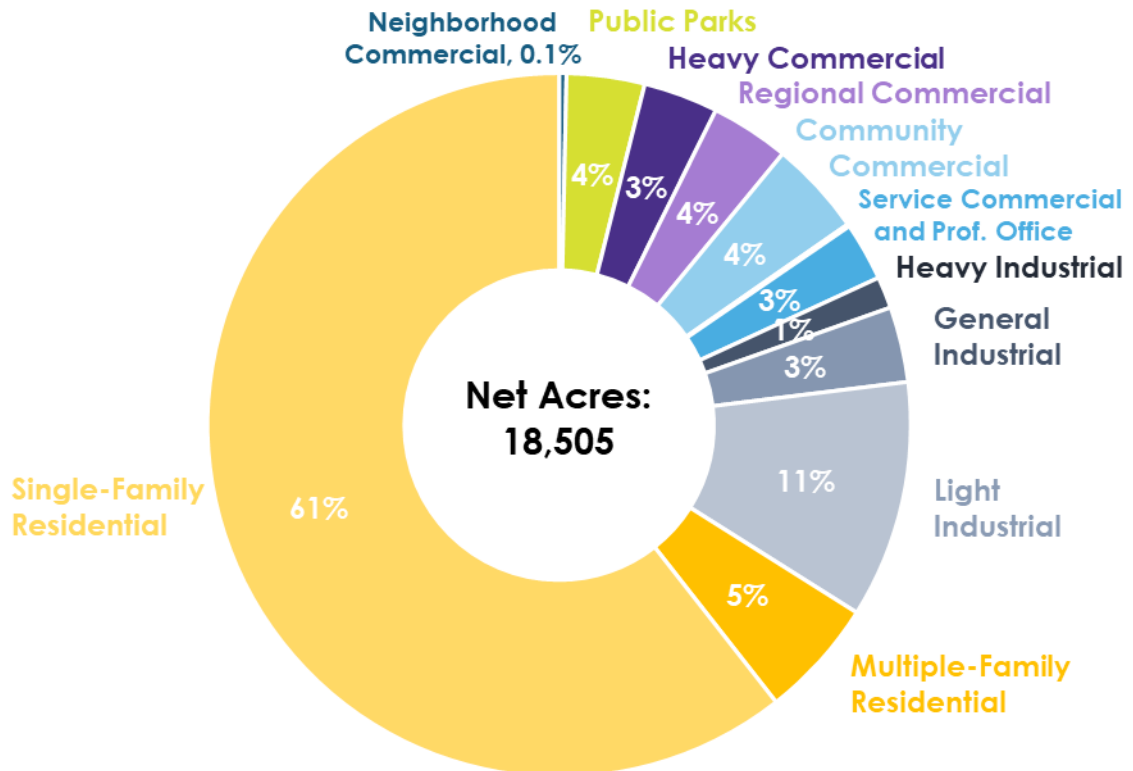
Exhibit 14. Medford Zoning Map, 2025



Sources: Medford Open Data Portal, 2025.

When rights-of-way are removed from the land area estimates, Medford’s net land area is 18,505 acres. The city's zoning framework designates a significant portion of land for single-family residential use (61% of acreage net of rights-of-way), with zones allowing for commercial and industrial uses occupying smaller shares (**Exhibit 15**). Light industrial areas (making up a net 2,018 acres) are more prevalent than heavy industrial zones (with 268 acres). 3% of Medford’s acreage allows for heavy commercial uses, while another 11% of land is zoned for less dense commercial and/or office uses.

Exhibit 15. Share of Land Area by Zoning Designations, Medford, 2025



Source: Medford Zoning, 2025; CAI, 2025.

Climate

The Rogue Valley is characterized by a mild climate with four distinct seasons, shaped by its location on the west coast of North America and proximity to the Cascade Range. Average daily high temperatures range from 45°F to 55°F in winter and 80°F to 95°F in summer. Among Oregon’s western interior valleys, the Rogue Valley receives the least precipitation, with annual rainfall averaging around 25 inches in the valley and up to 80 inches in the higher elevations of the Cascades.

In response to growing climate-related risks, the City of Medford drafted the **Climate Change Adaptation and Resiliency Plan (CCARP)** in 2023. The plan identifies local vulnerabilities and outlines adaptation strategies, drawing on findings from regional,

state, and national sources. According to the CCARP, the Rogue Valley is expected to experience increasingly hot and dry conditions, along with elevated risks of drought, wildfires, and reduced air quality. Action steps identified as a result of this work include solutions to protect natural systems, the regional economy, the built environment, public health and the Medford community.

In 2023, The City of Medford also adopted a **Medford Natural Hazard Mitigation Plan**, which includes the hazard probability matrix shown in **Exhibit 16**. This plan identifies wildfires, drought, and extreme heat as the most likely hazards facing the Medford area in the future, with significant probabilities for occurrence which could lead to significant injury, displacement and property damage.

Recent events, such as the Almeda Fire and the South Obenchain Fire in 2020, have highlighted the potential for large-scale economic and community disruption. Climate change poses a particular threat to the Rogue Valley’s tourism industry. Outdoor recreation, agricultural tourism (such as wineries), and arts-based tourism are especially vulnerable to disruptions from wildfires, smoke, and extreme heat. Prolonged heat waves also present health and safety risks to at-risk populations, including retirees. In addition, worsening drought conditions may constrain water availability, affecting not only tourism but also agriculture, industry, and daily residential use.

Exhibit 16. Climate Hazards Analysis, Medford, 2023

Hazard	History	Vulnerability	Maximum Threat	Probability	Total Threat Score	Hazard Rank	Hazard Tiers
Wildfire	16	45	100	70	231	#1	Top Tier
Drought	20	45	100	63	228	#2	
Earthquake - Cascadia	2	50	100	49	201	#3	
Winter Storm	20	20	100	56	196	#4	
Flood	12	30	80	49	171	#5	Middle Tier
Extreme Heat Event	20	5	70	70	165	#6	
Earthquake - Crustal	2	40	100	21	163	#7	
Windstorm	12	5	70	49	136	#8	Bottom Tier
Landslide	6	30	40	28	104	#9	
Volcanic Event	2	5	50	7	64	#10	

Sources: Medford Natural Hazard Mitigation Plan, 2023.

NATIONAL, STATE, AND REGIONAL ECONOMIC TRENDS

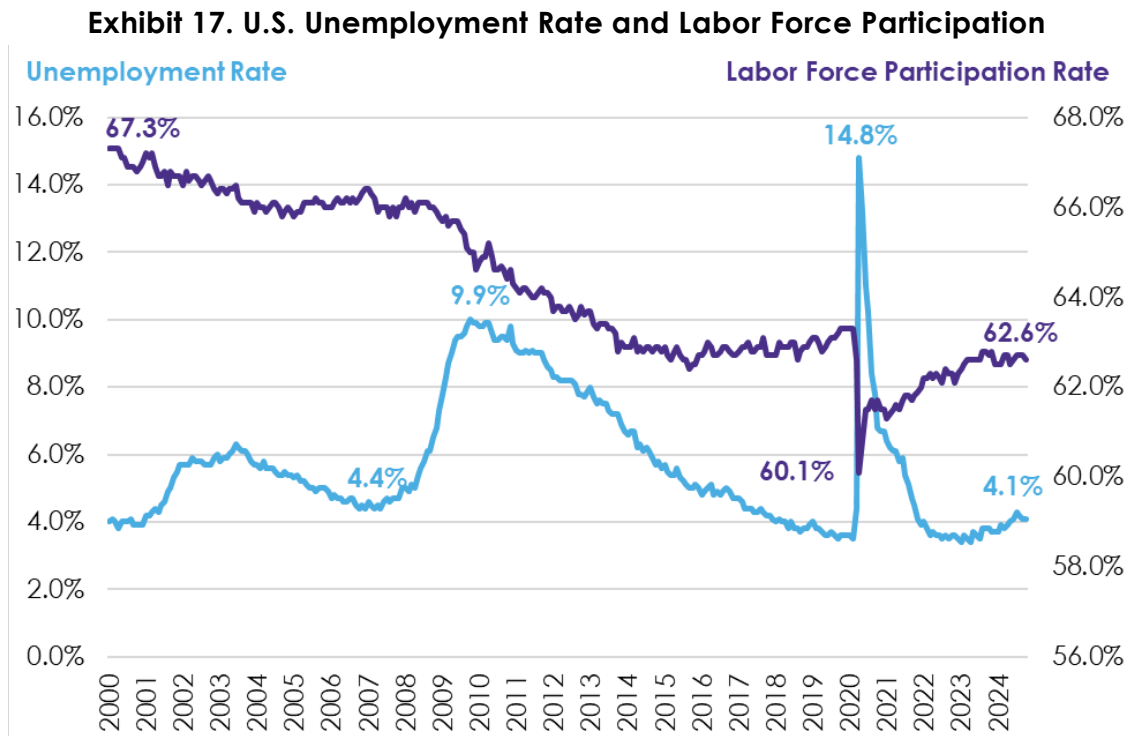
This section summarizes economic trends at the national, state and regional levels that influence local economic conditions in Ashland.

Macroeconomic Indicators

Nationally, the unemployment rate of 4.1% in 2024 matches pre-pandemic level lows.

The national estimate for labor force participation rate has steadily declined since 2000, falling from 67.3% and reaching a low of 60.1% in early 2020 amid the COVID-19 pandemic (**Exhibit 17**). The unemployment rate increased during two recent economic

downturns, rising to 9.9% after the 2008 financial crisis and to 14.8% in April 2020 due partially to pandemic-related job losses. Since then, the unemployment rate has fallen lower than pre-pandemic levels, reaching 4.1% in 2024. As of October of 2024, labor force participation in the U.S. increased to 62.6%, though this remains lower than early 2000s levels.

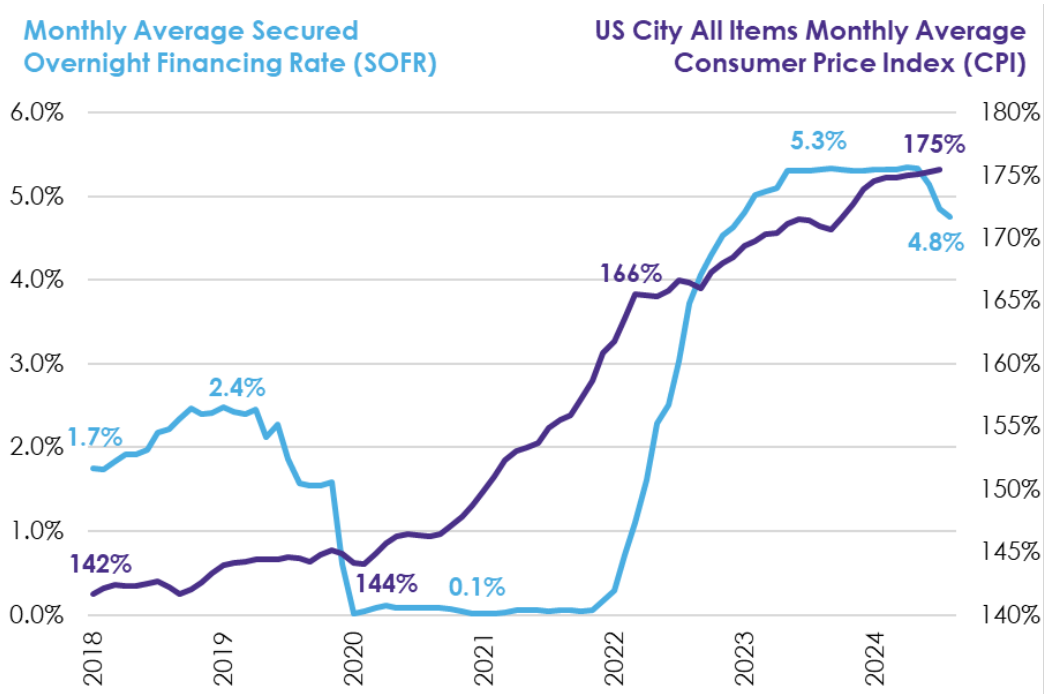


Sources: U.S. Bureau of Labor Statistics, 2024; CAI, 2024.

Meanwhile, the national Consumer Price Index (CPI) has consistently climbed upward since 2018, reaching a local high at the end of 2024.

In 2020, amid the pandemic, the Secured Overnight Financing Rate (SOFR) dropped to near-zero levels (0.1%) while the CPI began to increase (**Exhibit 18**). SOFR remained low until mid-2022, when it increased to a peak of 5.31% in 2023 as the Federal Reserve tightened monetary policy. Concurrently, the CPI increased from 144% in the beginning of 2020 up to 166% by the end of 2022. This reflects a 15% average annual growth rate between 2020-2022, signifying increased inflation. Following 2022, CPI continued to climb, though at a lower average annual rate of 5% from the end of 2022 to 2024. As of late 2024, CPI remains high compared to pre-pandemic levels, at 175%, while SOFR decreased to 4.8%.

Exhibit 18. Monthly Average Secured Overnight Financing Rate (SOFR) and Consumer Price Index (CPI), United States, (2018-2024)



Sources: U.S. Federal Reserve Bank, 2024; U. S. Bureau of Labor Statistics, 2024; CAI, 2024.
Note: CPI Base Period: December 1999 = 100

Southern Oregon and the Rogue River Valley

Population

Overall, Oregon has experienced steady population growth, with Jackson and Josephine Counties ranking near the middle in terms of population growth compared to other counties in the state.

Since 2020, the populations of both Medford and Ashland have grown more quickly than the state. Medford's growth rate was the highest of these geographies (**Exhibit 19**).

Exhibit 19. Historic Population Growth Estimates, Jackson County, Josephine County, Medford and Ashland, 1980-2024

Geography	1980	2000	2020	2023	CAGR (2020- 2023)
Oregon State	2,633,156	3,421,399	4,268,055	4,296,626	0.2%
Jackson County	132,456	181,269	223,240	222,762	-0.1%
City of Medford			85,994	87,942	0.7%
City of Ashland			21,105	21,457	0.6%
Josephine County	58,855	75,726	86,560	88,814	0.9%

Sources: University of Portland Population Research Center, 2025; CAI, 2024.

Note: These population estimates may vary from some local estimates, partially due to the resettling of residents displaced by the 2020 Alameda wildfires.

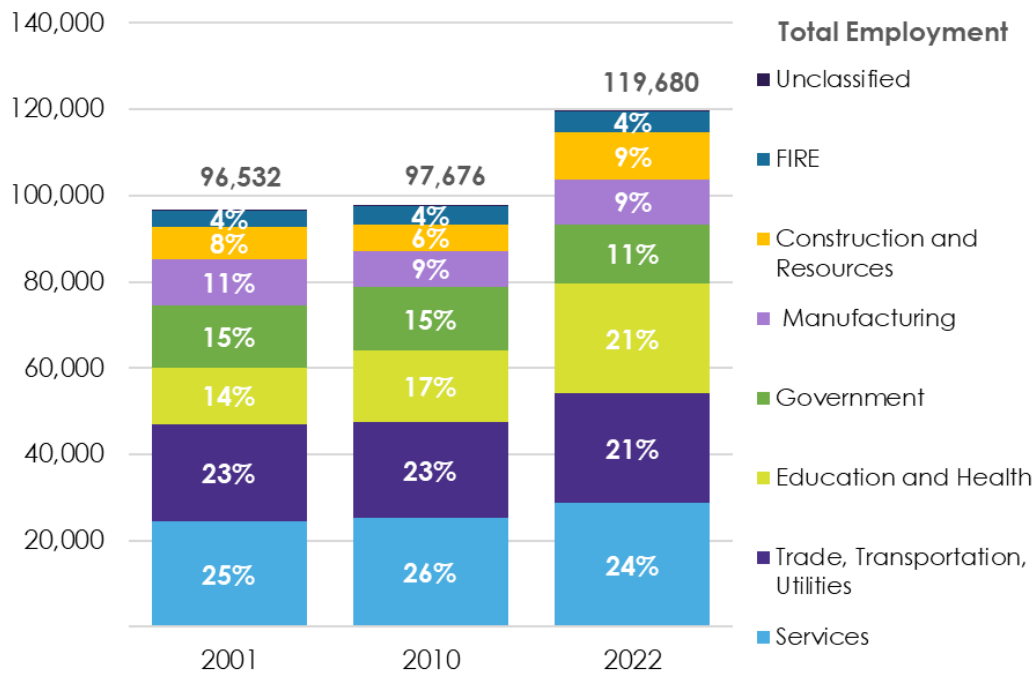
Industry and Employment

Both Oregon and Jackson County economies are heavily reliant on the Services sector, making up nearly half of all jobs. Jackson County also shows an emphasis on Retail Trade, underscoring the presence of regional commercial hubs within the county.

For the Jackson and Josephine 2-County region, the major industry sectors which account for the most private jobs in 2021 are Services (with 24% of all jobs within the two counties) and Trade, Transportation, & Utilities (21%) and Education and Health (21%) (

Exhibit 20). A full list of which 2-digit NAICS code industries are included in each major industry sector is described in **Exhibit 21**.

Exhibit 20. Covered (Private) Employment by Major Industry Sector, Jackson and Josephine 2-County Region, 2001, 2010, & 2022



Sources: Oregon Employment Department, 2001, 2010 & 2022; CAI 2024.

Note: FIRE industry group includes Finance, Insurance and Real Estate.

Exhibit 21. Major Industry Sectors by Corresponding NAICS Codes, 2022

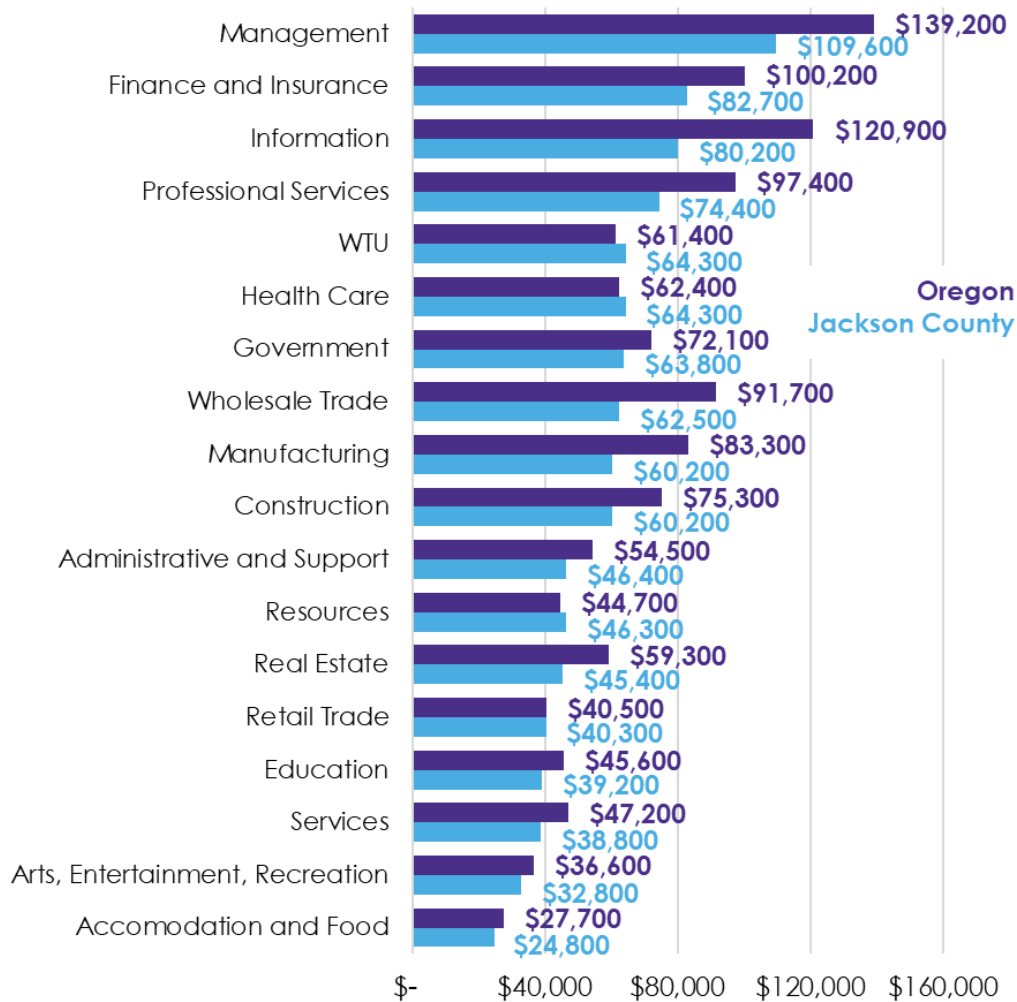
Industry Aggregates	Covered NAICS
Services	51, 54-56, 71-72, 81
Trade, Transportation, Utilities	22, 42, 44-45, 48-49
Education and Health	61-62
Government	Government
Manufacturing	31-33
Construction and Resources	11, 21, 23
FIRE	52-53
Unclassified	99

Source: CAI, 2025.

Workforce and Wages

Jackson County's top earning industries include Management (making an average annual wage of \$109,600), Finance and Insurance (\$82,700), and Information (\$80,200) (**Exhibit 22**). Average annual wages in Jackson County are generally lower than wages at the State level.

Exhibit 22. Average Annual Wages by Occupation, Oregon & Jackson County, 2022



Sources: Oregon Employment Department, 2022; CAI 2024.

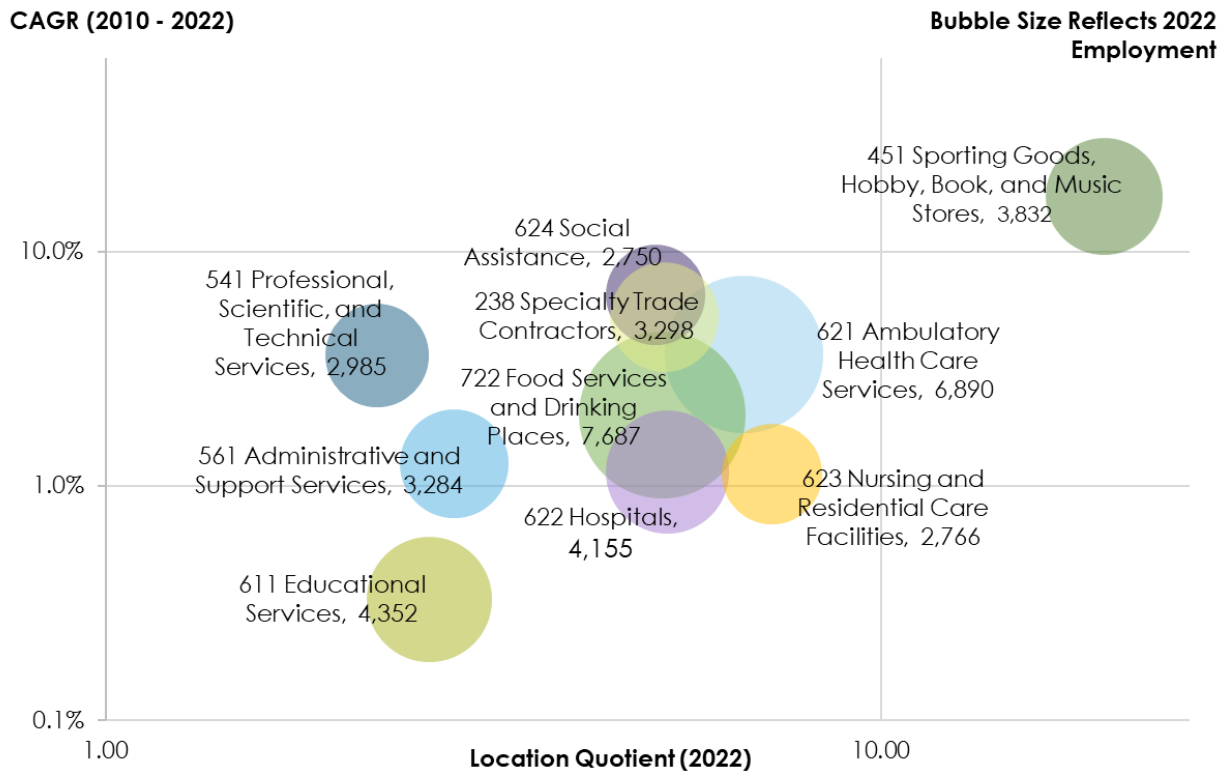
Jackson County has a fairly specialized workforce, with 3-digit NAICS industries such as Sporting Goods, Healthcare Services, and Food and Beverage Locations growing and providing jobs.

The Sporting Goods, Hobby, Book, and Music Stores industry, or NAICS Code 451, not only has seen significant growth since 2010 (with a CAGR greater than 10.0%), but it also has a high concentration of employment in Jackson County compared to the nation, with an LQ above 10.0 (**Exhibit 23**). Jackson County's other fastest growing industries from 2010-2022 are Social Assistance (NAICS Code 624) with a CAGR of 6.6%, and Specialty Trade Contractors (NAICS Code 238) with a CAGR of 5.3%.

Jackson County also specializes in Nursing and Residential Care Facilities (NAICS Code 623), which shows an LQ value of 7.24, and Ambulatory Health Care Services (NAICS Code 621), which has an LQ value of 6.66. This industry also has high employment, at around 6,900 workers. The Food Services and Drinking Places industry

(NAICS Code 722) is significant in Jackson County as well, demonstrating a high LQ (5.23) along with the highest employment in the County with around 7,700 workers in 2022.

Exhibit 23. Top 10 Industries (at 3-digit NAICS) by Employment, Location Quotient, and Growth, Jackson County



Sources: Oregon Employment Department 2010 & 2022; U.S. Bureau of Labor Statistics, 2022; CAI 2024.

LOCAL ECONOMIC CHARACTERISTICS AND TRENDS

This section analyzes data on Ashland's local economy—including industry composition, employment, workforce and commuting patterns, market conditions, and other key metrics—to describe local economic characteristics and trends.

Industry and Workforce

Medford's Labor- and Commute-Sheds

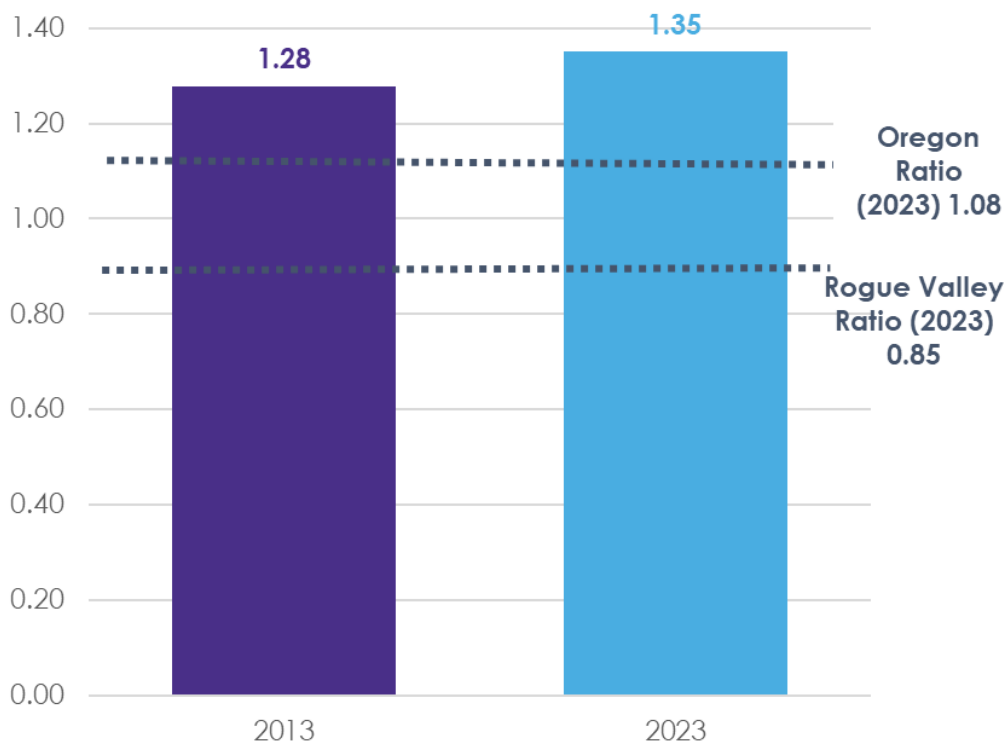
The jobs-to-housing units ratio metric describes the degree to which a community is an employment center (a higher ratio value) versus more of a bedroom community (a lower ratio).

Using non-confidential, private employment numbers from Oregon Employment Department, which offers estimates up to 2023, Medford's jobs-to-housing unit ratio in

2023 is 1.35, up slightly from 1.28 in 2013 (**Exhibit 24**). Medford’s ratio is much higher than that of the Rogue Valley (0.85), which shows that on net, more people commute to Medford daily to work than vice versa. This establishes Medford as a primary employment center in the Rogue Valley.

Medford’s jobs to housing units ratio is higher than that of the state of Oregon as a whole at 1.08 statewide. Jackson County’s labor force participation rate was 57.4% in 2024; Josephine’s was just 49.6%, compared to 62.2% statewide and 63.0% nationwide.

Exhibit 24. Job to Housing Unit Ratio, Medford, 2013 and 2023



Source: American Community Survey, 2013, 2023; State of Oregon Employment Department, 2013, 2023; U.S. Bureau of Labor Statistics, 2013, 2023; CAI, 2025

Commute data supports the perception that Rogue Valley’s labor and commute sheds are very intertwined.

According to the Census Bureau’s 2022 commute data, Medford’s workforce includes 51,749 people. Of these, 37% (19,387 individuals) both lived and worked in Medford, while the remaining 63% commuted in from other communities (**Exhibit 25**).

However, Medford had 35,573 employed residents in 2022. 54% worked within the city, while 46% commuted to jobs outside Medford. This dynamic results in a net inflow of workers. In 2022, at least 16,176 people commuted into Medford for work.

Exhibit 25. Commuting Patterns of Medford's Workforce and Residents, Medford, 2022

Metric	Count	Share of Medford Residents	Share of Medford Workers
Total Employed in Medford	51,749		
Total Living in Medford	35,573		
Net Inflow of Workers	16,176		
Both Live and Work in Medford	19,387	54%	37%
Work in Medford, Live Outside	32,362		63%
Live in Medford, Work Outside	16,186	46%	

Sources: U.S. Census Bureau Longitudinal Employer-Household Dynamics (LEHD), 2021; CAI, 2024.

Exhibit 26 shows Medford's labor inflow and outflow by industry. It's important to note that inflow/outflow values do not reflect the actual number of commuters; rather, they represent the net difference between the total number of jobs located in Medford and the number of Medford residents working in each industry. As such, they do not account for Medford's working residents who commute elsewhere for jobs that are similar to those that already exist in Medford, and should be interpreted as a rough indicator of industry-level labor exchange.

Industries with the highest inflow of labor were Health Care and Social Assistance (+5,954), Retail Trade (+3,408), and Accommodation and Food Services (+1,465). Top industries for labor outflow in Medford are Agriculture and Resources (-370) and Manufacturing (-306). While outflow is higher for the manufacturing industry than other industries in Medford, manufacturing is in the top 5 industries by employment in Medford with an estimated 2,368 jobs, or 5% of Medford's jobs in 2022.

Exhibit 26. Total Employment Labor Inflow & Outflow by Industry, Medford, 2022

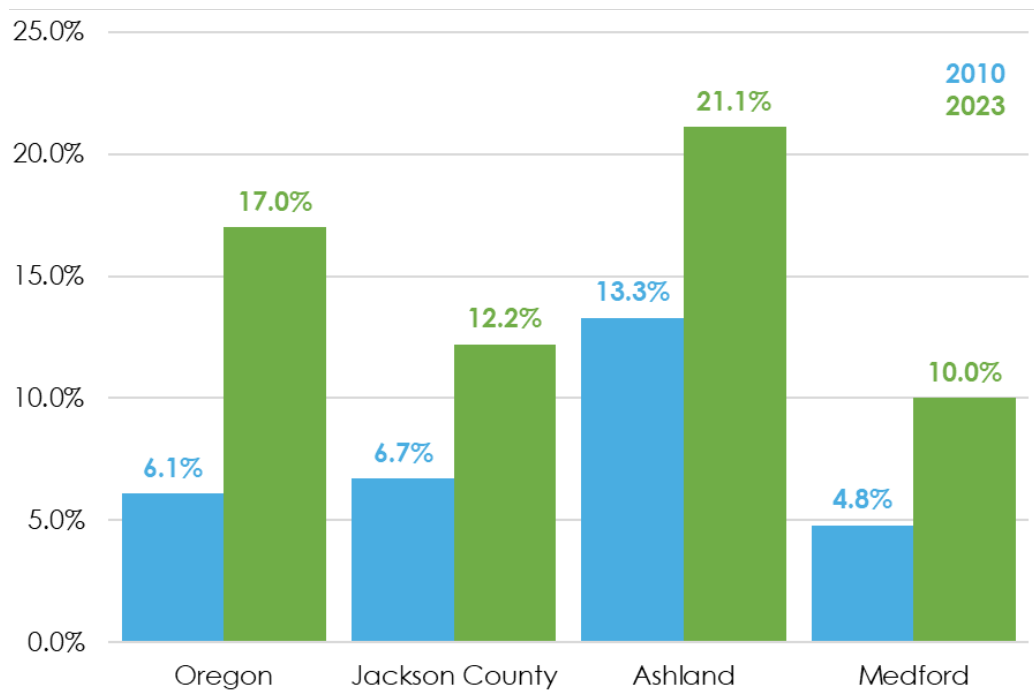
Jobs in Medford	Jobs in Medford	% of Total Jobs in Medford	Jobs of Medford Residents	% of Total Resident Jobs	Inflow / (Outflow)
Health Care and Social Assistance	13,749	27%	7,795	22%	5,954
Retail Trade	8,982	17%	5,574	16%	3,408
Accommodation and Food Services	4,958	10%	3,493	10%	1,465
Finance and Insurance	1,798	3%	960	3%	838
Public Administration	1,855	4%	1,106	3%	749
Management of Companies and Enterprises	1,239	2%	592	2%	647
Professional, Scientific, and Technical Services	1,880	4%	1,261	4%	619
Wholesale Trade	1,664	3%	1,057	3%	607
Admin, Support & Waste Management	2,337	5%	1,771	5%	566
Construction	2,578	5%	2,098	6%	480
Other Services (excluding Public Administration)	1,523	3%	1,099	3%	424
Information	897	2%	534	2%	363
Educational Services	2,071	4%	1,844	5%	227
Real Estate and Rental and Leasing	763	1%	546	2%	217
Transportation and Warehousing	1,400	3%	1,203	3%	197
Arts, Entertainment, and Recreation	652	1%	572	2%	80
Utilities	197	0%	159	0%	38
Mining, Quarrying, and Oil and Gas Extraction	8	0%	35	0%	(27)
Manufacturing	2,368	5%	2,674	8%	(306)
Agriculture, Forestry, Fishing and Hunting	830	2%	1,200	3%	(370)
	51,749		35,573		16,176

Sources: U.S. Census Bureau Longitudinal Employer-Household Dynamics (LEHD), 2021; CAI, 2024.

As of 2023, 28% of Medford's population holds a bachelor's degree or higher, compared to 28% in Jackson County and 62% in Ashland.

The proportion of working residents (16 and older) who report working from home has increased in Medford as well as in Oregon, Jackson County and Ashland since 2010 (**Exhibit 27**). While the Census Bureau's American Community Survey does not differentiate between remote workers, home occupations or other work-from-home arrangements, the elevated proportion of workers reporting at-home work aligns with larger trends towards remote work following the pandemic. In 2010, 4.8% of Medford's working residents reported working from home; by 2023, that figure had risen to 10.0%, representing a compound annual growth rate of 5.2%. This is compared to 12.2% of working residents in Jackson County reporting working from home in 2023, 17.0% in Oregon, and 21.1% in Ashland.

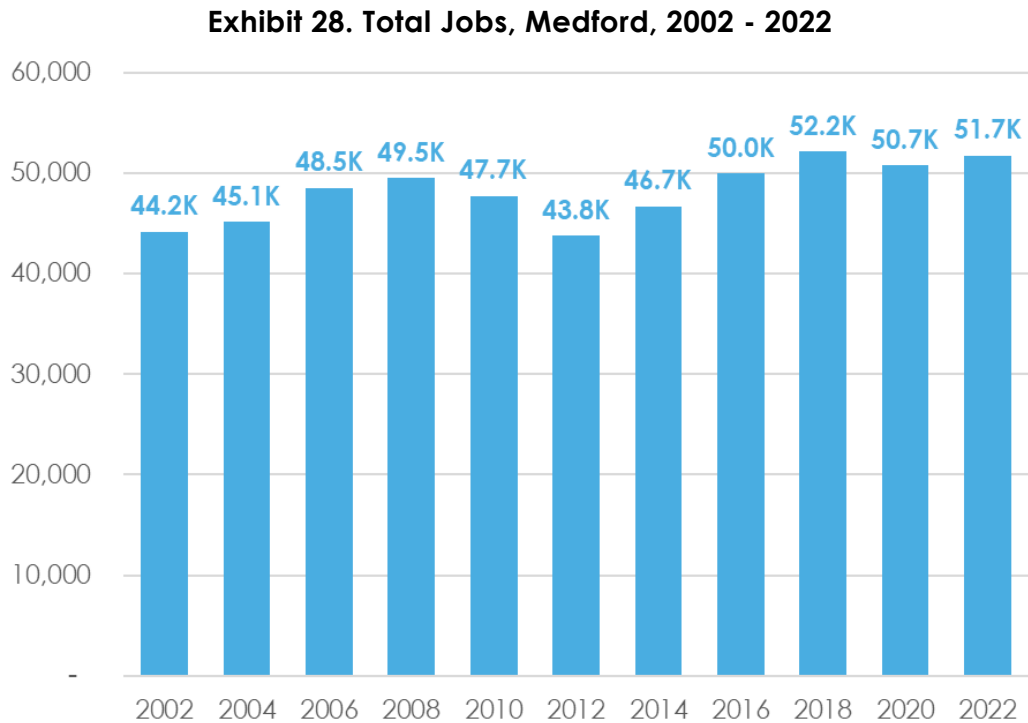
Exhibit 27. Proportion of Workers 16+ Who Work from Home, Oregon, Jackson County, Ashland & Medford, 2010 & 2023



Source: ACS 5-year Estimates, 2023; CAI, 2025.

Medford's Industries and Employment

Total employment in Medford, which includes both public and private jobs, has shown periods of both expansion and contraction from 2002-2022, landing at 51,749 jobs in 2022 (**Exhibit 28**). Despite fluctuations, overall job growth in Medford has trended upward over the long term at a CAGR of 0.8% from 2002-2022.



Sources: Longitudinal Employer-Household Dynamics (LEHD) On the Map, 2002-2022; CAI 2025.

According to non-confidential estimates from the Oregon Employment Development (OED), Medford had 49,201 private jobs in 2023, up by 7,538 jobs since 2013, reflecting a 1.7% CAGR over the decade.

The largest private employment gains from 2013 - 2023 occurred in the Health Care and Social Assistance sector, which added 3,810 jobs, and the Utilities and Construction sector, which grew by 1,225 jobs (**Exhibit 29**). Other sectors experiencing notable growth included Professional, Scientific, and Technical Services (+415 jobs) and Accommodation and Food Services (+1,103 jobs). Some industries saw declines in private employment over the period. Information experienced the largest reduction, losing 589 jobs (-7.4% CAGR), followed by Finance and Insurance (-268 jobs, -1.8% CAGR) and Retail Trade (-85 jobs, -0.1% CAGR). Manufacturing also saw a slight decrease, shedding 29 jobs. Despite declines in some sectors, overall private employment trends indicate steady growth across most industries in Medford.

Exhibit 29. Private, Non-confidential Employment by 2-Digit NAICS Industries, Medford, 2013 & 2023

Industry	2-Digit NAICS	2013	2023	CAGR	Change
Agriculture and Resources	11	727	1,064	3.9%	337
Construction and Utilities	21, 22, 23	1,475	2,700	6.2%	1,225
Manufacturing	31-33	2,333	2,304	-0.1%	-29
Wholesale Trade	42	1,619	1,718	0.6%	99
Retail Trade	44-45	9,009	8,924	-0.1%	-85
Transportation and Warehousing	48-49	1,816	2,191	1.9%	375
Information	51	1,095	506	-7.4%	-589
Finance and Insurance	52	1,639	1,371	-1.8%	-268
Real Estate, Rental and Leasing	53	547	724	2.8%	177
Professional, Scientific, and Technical Services	54	1,342	1,787	2.9%	445
Management of Companies and Enterprises	55	1,144	1,462	2.5%	318
Admin, Support and Waste Management	56	1,995	2,340	1.6%	345
Educational Services	61	500	665	2.9%	165
Health Care and Social Assistance	62	10,202	14,012	3.2%	3,810
Arts, Entertainment, and Recreation	71	487	622	2.5%	135
Accommodation and Food Services	72	4,165	5,178	2.2%	1,013
Other Services (except Public Administration)	81	1,562	1,614	0.3%	52
Unclassified	99	6	19	12.2%	13
Total		41,663	49,201	1.7%	7,538

Sources: State of Oregon Employment Department, 2013 & 2023; CAI 2025.

Exhibit 30 summarizes projected employment growth within Medford's Urban Growth Boundary (UGB) through the year 2045. These employment forecasts inform the **Employment Lands Sufficiency** section of the Economic Opportunities Analysis (EOA).

Forecast employment in Medford is based on estimates of private, non-confidential employment from 2013-2025 provided by the State of Oregon Employment Department (OED), as well as Bureau of Labor Statistics (BLS) Quarterly Census of Employment and Workers (QCEW) covered employment estimates for Jackson and Josephine Counties. These were utilized to apportion the OED published Rogue Valley Forecast for

the period 2023-2033. The resulting Medford forecast adapts Jackson County's portion of projected regional growth to the city based on the trajectory of sectoral shares of countywide employment projected into the future. The Compound Annual Growth Rate (CAGR) represents resulting year-over-year growth for the twenty year period 2025-2045.

Medford's private employment is projected to increase from 51,083 in 2025 to 62,491 by 2045, a total increase of 11,408 jobs or 22%. The Leisure and Hospitality sector is projected to add the most jobs (an estimated 1,660) over this time frame, representing a compound annual growth rate (CAGR) of 1.2%. Finance, Insurance and Real Estate (FIRE) is projected to grow the fastest from 2025-2045, with a CAGR of 2.6%. Information is projected to decrease over the period, with a projected annual decrease of -0.3%.

Exhibit 30. Employment Forecasts, Medford Urban Growth Boundary, 2045

Industry	2013	2025	2035	2045	CAGR (‘25-‘45)
Health Care	10,202	14,930	16,768	19,474	1.3%
Retail	9,009	8,907	9,117	9,282	0.2%
Leisure & Hospitality	4,652	6,062	6,780	7,721	1.2%
Professional & Business Services	4,481	5,842	6,315	6,991	0.9%
Const, Resources & TWU	4,018	6,443	6,921	7,844	1.0%
Manufacturing	2,333	2,298	2,424	2,529	0.5%
FIRE	2,186	2,077	2,755	3,462	2.6%
Wholesale	1,619	1,739	1,872	2,011	0.7%
Other Services	1,562	1,625	1,808	1,988	1.0%
Information	1,095	434	449	406	-0.3%
Educational Services	500	704	726	781	0.5%
Unclassified	6	24	0	-	-100.0%
Total	41,663	51,083	55,936	62,491	1.0%

Source(s): State of Oregon Employment Department, 2013 & 2023; BLS, 2025; CAI, 2025.

Note: FIRE stands for Finance, Insurance and Real Estate

Note: CAGR stands for Compound Annual Growth Rate

Exhibit 31. Industry Groupings by 2-Digit NAICS, Medford Employment Forecasts, 2025

Industry Aggregates	Covered NAICS	Industry Descriptions
Construction, Resources & TWU	11	Natural resources and mining
	21	Mining and logging
	22	Utilities
	23	Construction
	48-49	Transportation & warehousing
Manufacturing	31-33	Manufacturing
Wholesale	42	Wholesale trade
Retail	44-45	Retail trade
Information	51	Information
FIRE	52	Finance and Insurance
	53	Real Estate and Rental and Leasing
Professional & Business Services	54	Professional, Scientific, and Technical Services
	55	Management of Companies and Enterprises
	56	Administrative and Support and Waste
		Management and Remediation Services
Education	611	Private educational services
Health Care	62	Health care and social assistance
Leisure & Hospitality	71	Leisure and hospitality
	72	Accommodation and food services
Other Services	81	Other services

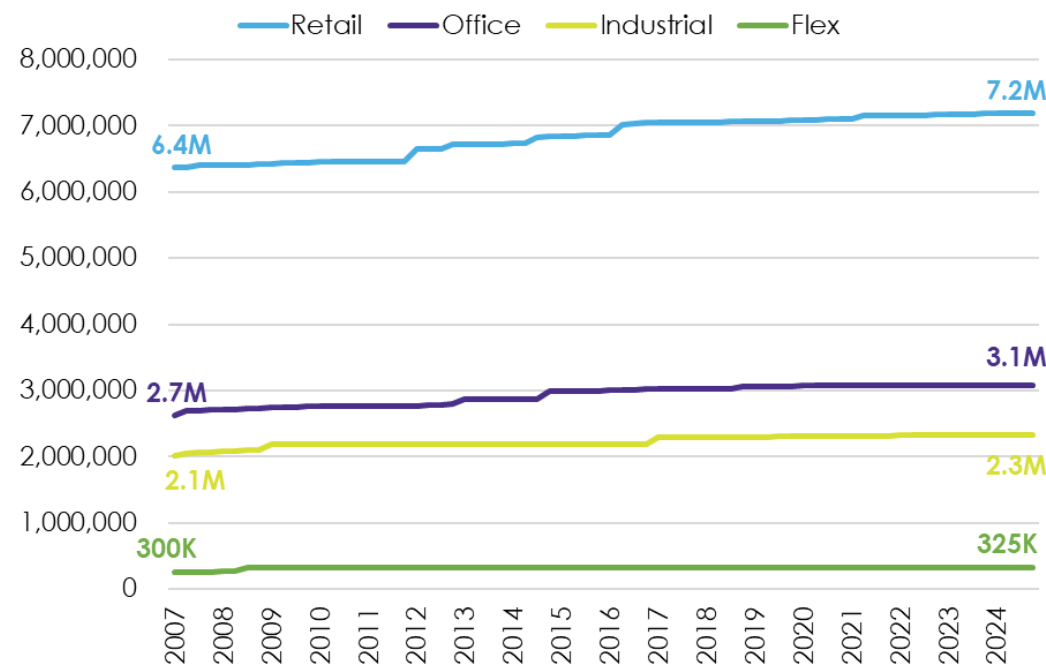
Sources: CAI, 2025.

Medford’s Market Conditions

Commercial Real Estate Inventory

The square footage of inventory by typology in Medford exhibits consistent moderate growth across all categories from 2007 to 2024 (**Exhibit 32**). Retail space experienced the largest growth, with a 12.5% increase in total square footage from 2007 to 2024. Flex buildings often house a combination of light industrial, office, or commercial uses within one space.

Exhibit 32. Square Footage of Inventory by Typology, Medford, 2007-2024



Source(s): Costar, 2024; CAI, 2025.

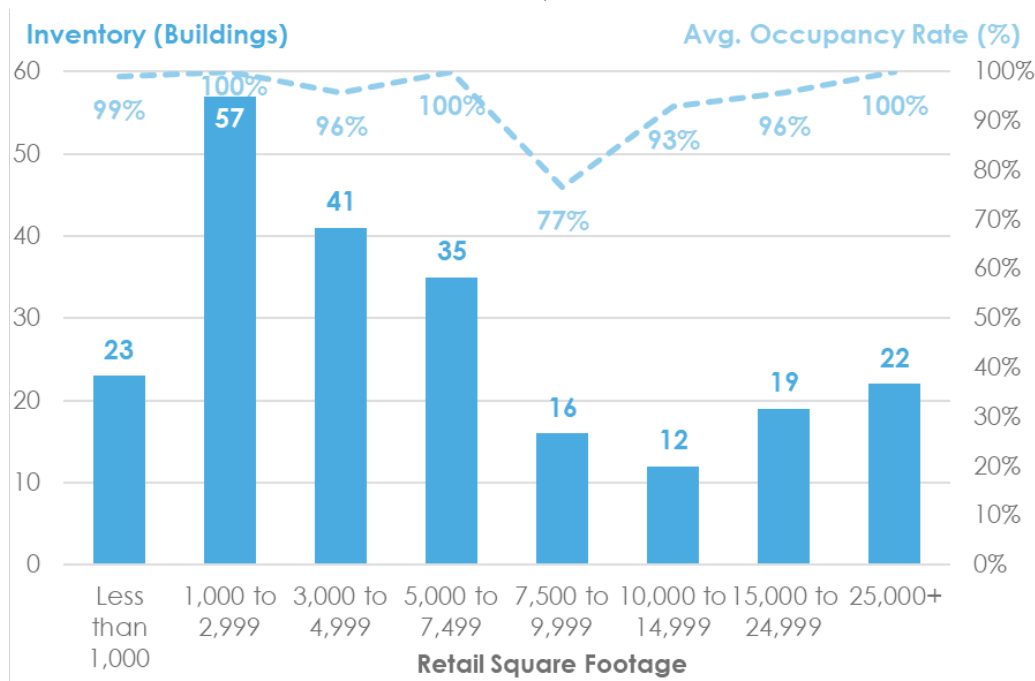
Retail

Exhibit 33 presents the inventory of single tenant retail buildings by square footage category alongside the average occupancy rate for each category. A single-tenant building is occupied by one business or organization—they lease or own the entire building. The most common retail building sizes for single tenants in Medford is 1,000–2,999 sq ft (with 57 buildings), 3,000–4,999 sq ft (with 41 buildings), and 5,000–7,499 sq ft (35 buildings). Together, these three size bins make up the bulk of the single tenant inventory.

Average occupancy is near or at 100% for small spaces, or spaces with less than 2,999 sq ft. Occupancy is also near 100% for spaces that are 5,000–7,499 sq ft and greater than 25,000 sq ft. This suggests strong demand for both large and small retail spaces. 7,500–9,999 sq ft buildings have the lowest average occupancy rate (77%) and a low inventory, with 16 buildings falling into this category. 10,000–14,999 sq ft and 15,000–24,999 sq ft

buildings also show a relatively lower average occupancy rate (93% and 96%) as well as lower building counts (with 12 and 19 buildings respectively).

Exhibit 33. Single Tenant Retail Inventory and Occupancy by Square Footage, Medford, 2024



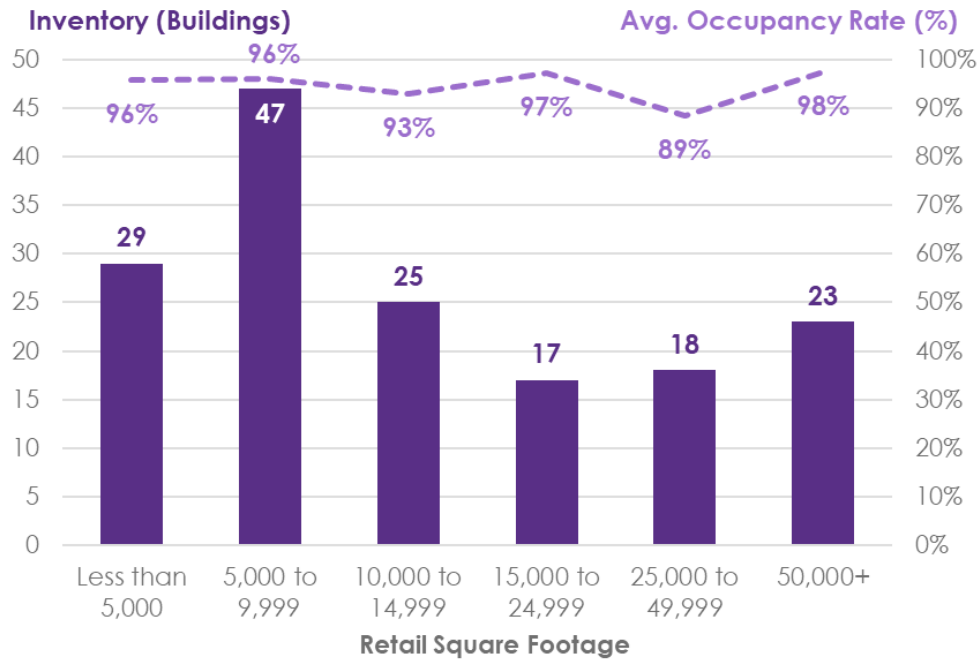
Source: Costar, 2024; CAI, 2025.

The data evaluating multi-tenant retail spaces by square footage presents a similar story (**Exhibit 34**). Multi-tenant retail properties include retail buildings where multiple businesses lease separate spaces within the same structure or development, such as a strip mall or shopping center.

The 5,000 to 9,999 sq ft category has the highest inventory (with 47 buildings). Most categories have occupancy rates between 93% and 98%, indicating healthy demand for multi-tenant space regardless of size. Even the smallest (<5,000 sq ft) and largest (50,000+ sq ft) buildings are highly occupied (96% and 98% respectively), suggesting that demand for small centers is high and well-located or well-managed large centers are being successfully leased.

The 15,000 to 24,999 sq ft range has the lowest occupancy rate at 89%, which might signal mild leasing challenges or less demand for mid-large format multi-tenant space. Variation in occupancy rates for mid-sized spaces is likely due to high variation in retail types. For example, while some large format stores like traditional mall anchors have shown decline in recent years, other large format stores like Target have experienced continued growth.

Exhibit 34. Multi-Tenant Retail Inventory and Occupancy by Square Footage, Medford, 2024

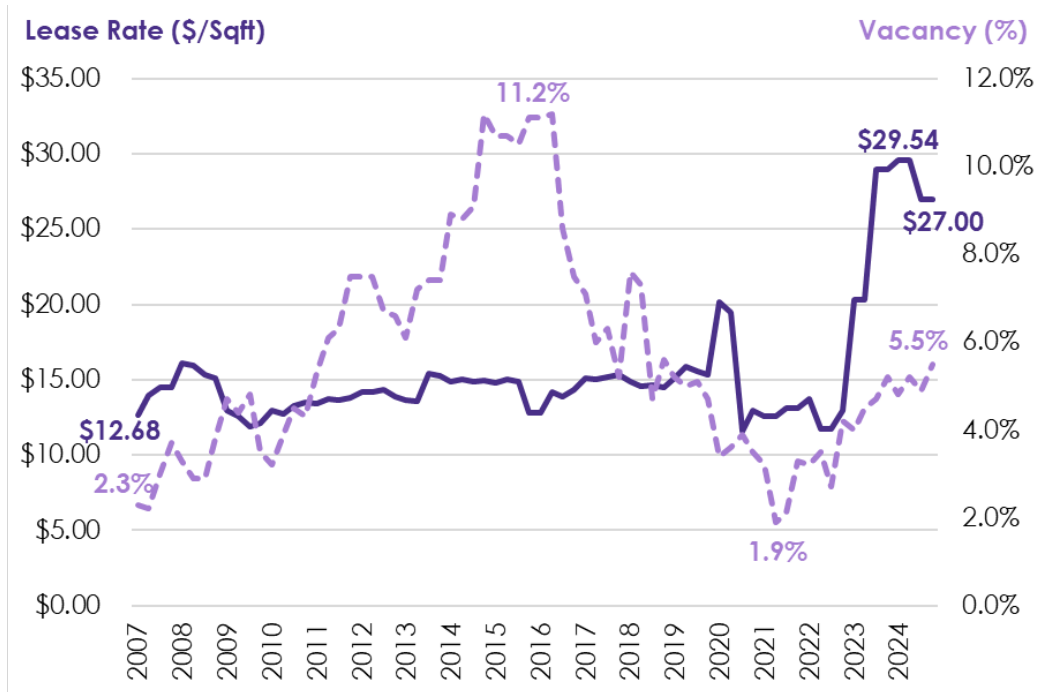


Source: CoStar Group, 2024; CAI, 2025.

Office

Exhibit 35 includes office lease rates and vacancy trends in Medford from 2007 to 2024. Office lease rates started at \$12.68 per square foot in 2007 and gradually increased, reaching \$27.00 per square foot in 2024, with a peak at \$29.54 per square foot in 2023. Office vacancy rates began at 2.3% in 2007, rose to a high of 11.2% in 2015, and then declined to a low of 1.9% in 2020. By 2024, vacancy rates increased slightly to 5.5%. The data illustrates a growing office lease market, with steadily rising lease rates despite fluctuations in vacancy rates. This is higher than the average annual office vacancy in the Rogue Valley, 4.7%. The trend for office lease rates in the Rogue Valley (including both Jackson and Josephine Counties) differs from Medford's experience. Annual average lease rates for the office sector in the counties varies little from 2009 to 2023, however, it increased sharply from 2023 to 2024, from \$13.90 to \$24.91 per square foot.

Exhibit 35. Office Lease and Vacancy, Medford, 2007-2024

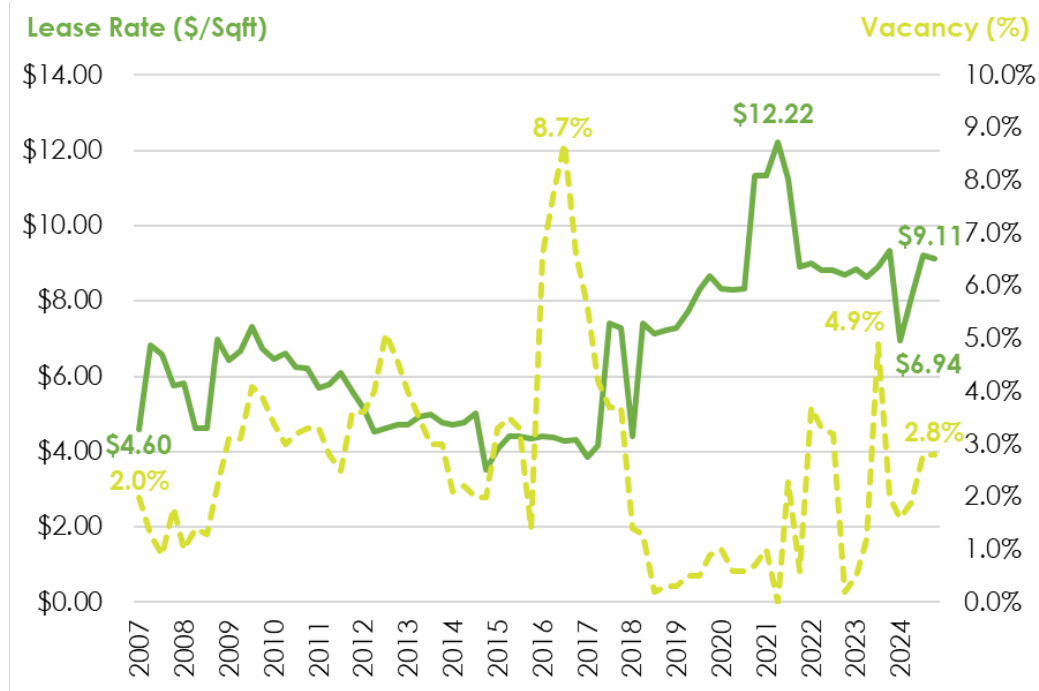


Source(s): Costar, 2024; CAI, 2025.

Industrial

Exhibit 36 explores industrial lease rates and vacancy trends in Medford from 2007 to 2024. Industrial lease rates increased from \$4.60 per square foot in 2007 to \$9.11 per square foot in 2024, with a peak at \$12.22 per square foot in 2021. Industrial vacancy rates began at 2.0% in 2007, peaked at 8.7% in 2016, and decreased to 2.8% in 2024. The vacancy rate briefly rose to 4.9% in 2023 before declining again. Medford's 2024 vacancy is lower than the 2024 annual average vacancy rate for industrial space in Jackson and Josephine counties (3.9%). While low vacancy generally indicates strong performance, the city may wish to work with developers to add industrial capacity if extremely low rates persistently challenge the ability for industrial tenants to find appropriate space.

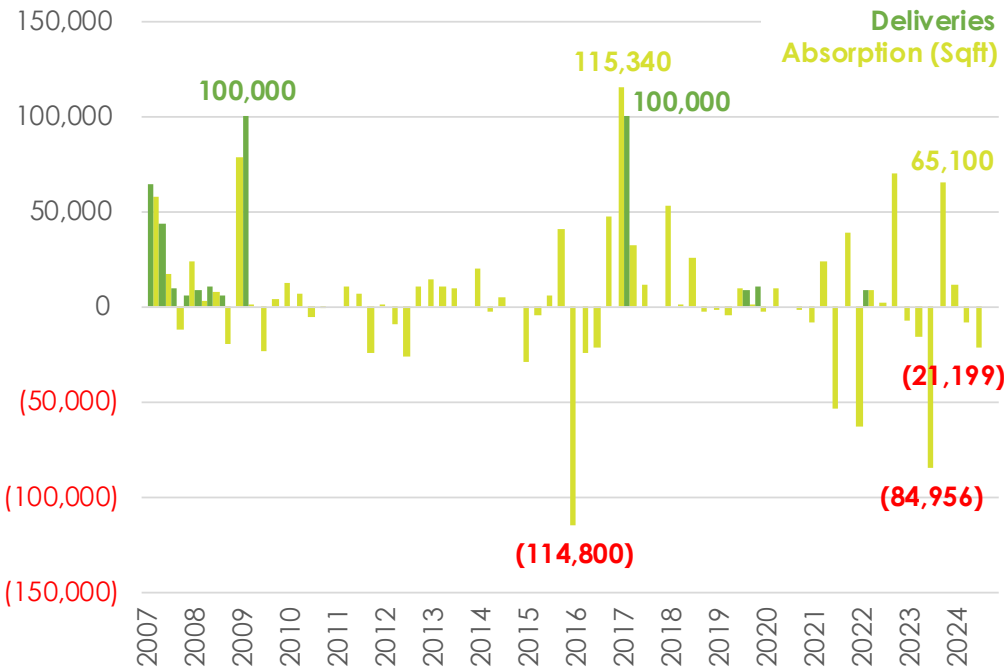
Exhibit 36. Industrial Lease and Vacancy, Medford, 2007-2024



Source(s): Costar, 2024; CAI, 2025.

Exhibit 37 explores new construction (deliveries) and when that inventory was absorbed into the market via lease agreements and renewals. Medford's industrial absorption trends have varied. Deliveries peaked in 2017 with 115,340 square feet, followed by 100,000 square feet in both 2009 and 2018, and 65,100 square feet in 2024. Absorption trends varied, with the lowest point in the period recorded in 2017 at -114,800 square feet. More recent years show fluctuation between positive and negative absorption, including -84,956 square feet in early 2023 and 65,100 square feet later that year. In 2024, absorption is slightly negative again.

Exhibit 37. Industrial Absorption and Deliveries, Medford, 2007-2024

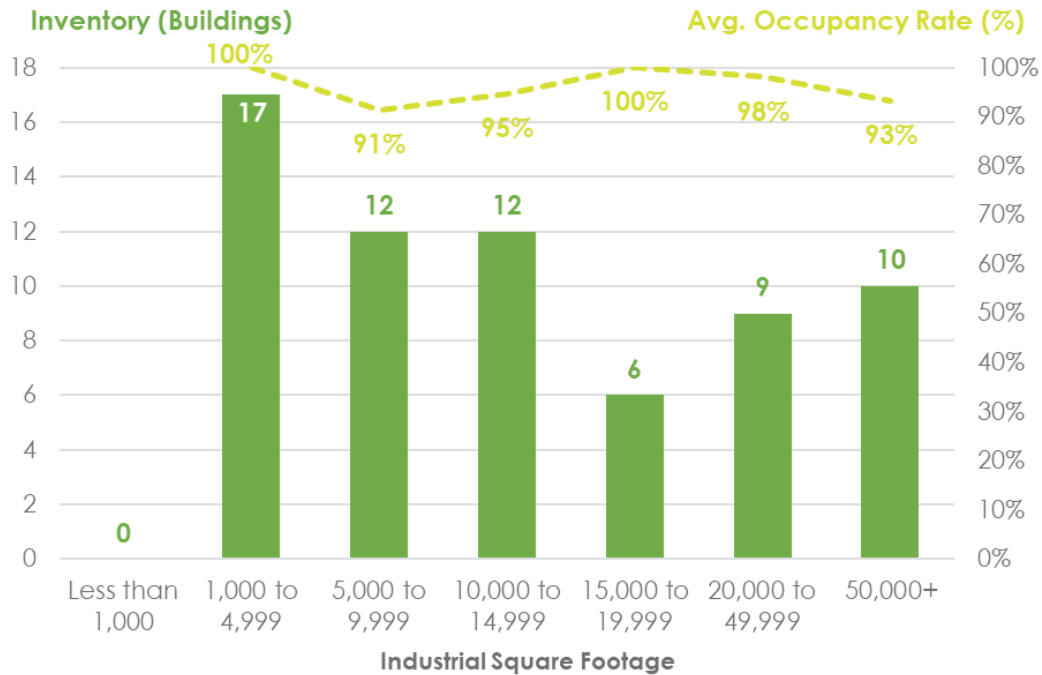


Source(s): Costar, 2024; CAI, 2025.

Exhibit 38 presents the inventory and occupancy rate of single tenant industrial buildings by square footage. The 1,000 to 4,999 sq ft category has the highest number of buildings (17), indicating a strong presence of small-scale single-tenant industrial facilities. However, there are no buildings under 1,000 sq ft, suggesting a minimum size threshold for Industrial buildings.

All size categories show very strong occupancy, ranging from 91% to 100% suggesting that the industrial market for single tenant industrial buildings is nearly fully leased. Both the 1,000–4,999 sq ft and 10,000–14,999 sq ft categories have 100% occupancy, indicating very tight market conditions for small to mid-sized facilities. Buildings over 50,000 sq ft have a 93% occupancy rate, and the 20,000–49,999 sq ft group is at 98%.

Exhibit 38. Single-Tenant Industrial Inventory and Occupancy by Square Footage, Medford, 2024



Source(s): Costar, 2024; CAI, 2025.

Multi-tenant industrial buildings also show high occupancy rates (**Exhibit 39**). There are 43 multi-tenant industrial buildings in Medford, with an almost even split in smaller spaces (less than 5,000 sq ft) and larger spaces (5,000-9,999 sq ft). Both size categories have an average occupancy rate of 97%, indicating a very tight and well-leased segment of the industrial market.

Exhibit 39. Multi-Tenant Industrial Inventory and Occupancy by Square Footage, Medford, 2024

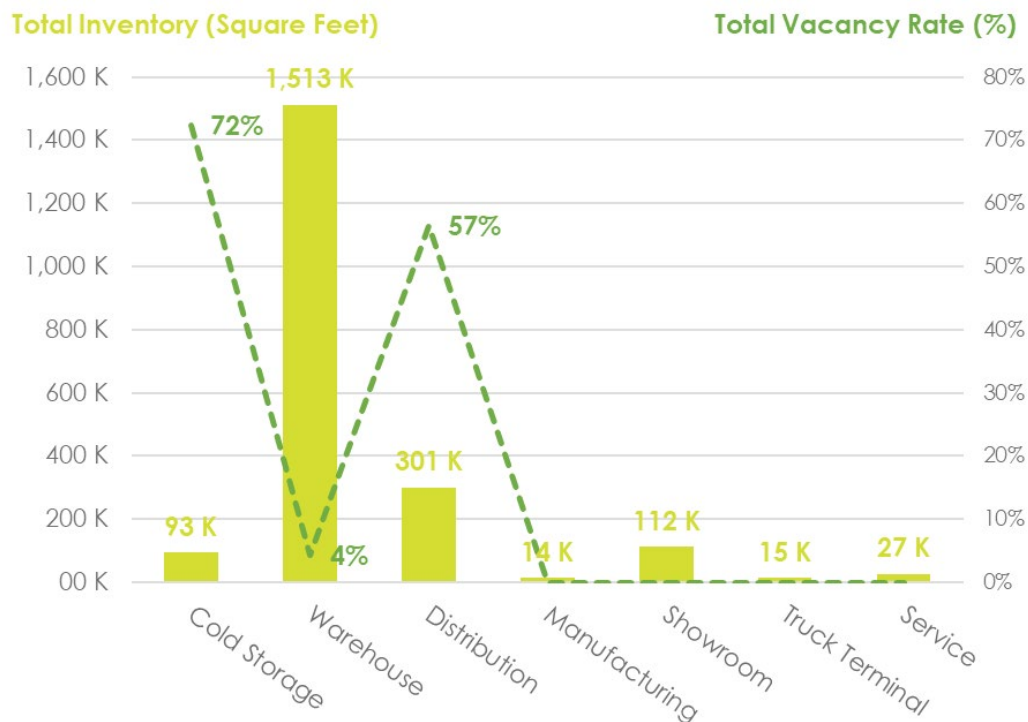
Industrial Square Footage	Inventory (Buildings)	Avg. Occupancy Rate (%)
Less than 5,000	21	97%
5,000 to 9,999	22	97%

Source(s): Costar, 2024; CAI, 2025.

In 2024, warehouse and general industrial space in Medford is highly utilized, while cold storage and distribution spaces are less utilized (**Exhibit 40**). Warehouse space represents by far the largest share of Medford’s industrial inventory, with approximately 1.5 million square feet of space and a low vacancy rate of 4%, indicating strong demand and limited available space. Cold storage and distribution subtypes show smaller total inventories—approximately 93,000 and 301,000 square feet, respectively—but exhibit elevated vacancy rates, with cold storage at 72% vacancy and distribution at 57% vacancy. This suggests available capacity in these specialized sectors.

Manufacturing, showroom, truck terminal, and service subtypes all represent relatively small portions of total industrial inventory, each with less than 120,000 square feet. Vacancy rates for these categories are minimal or near zero, reflecting limited available supply and potentially strong occupancy.

Exhibit 40. Industrial Inventory and Vacancy by Subtype, Medford, 2024



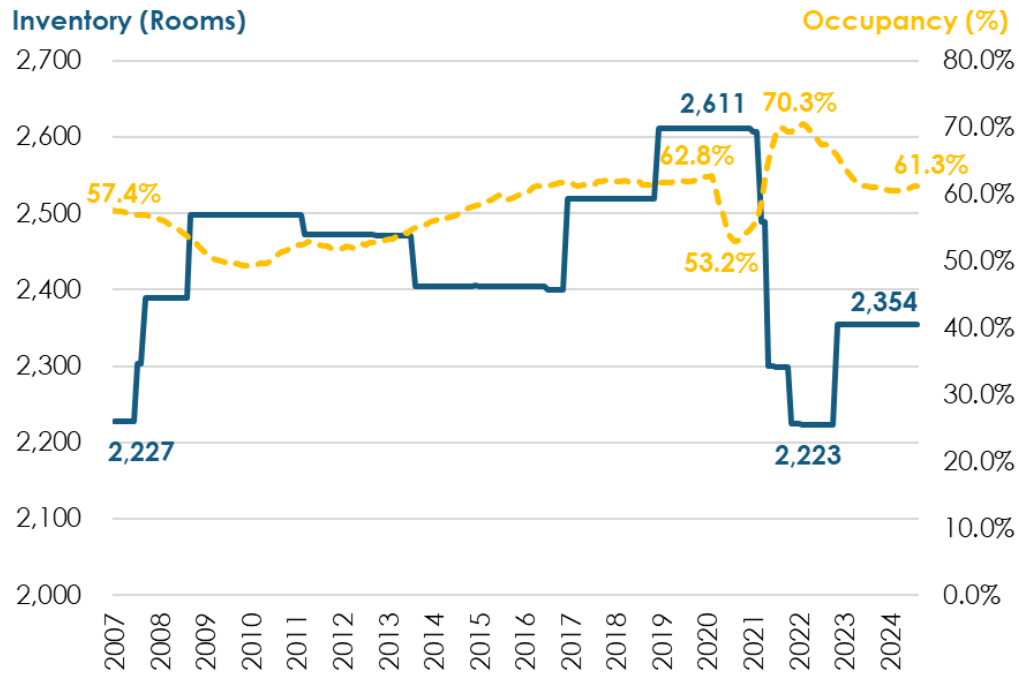
Source(s): Costar, 2024; CAI, 2025.

Hospitality

Medford's hospitality real estate inventory has fluctuated significantly from 2007 to 2024 (**Exhibit 41**). The number of rooms rose from 2,227 in 2007 to a peak of 2,611 in 2019, before declining to 2,223 rooms by 2021, a drop likely driven by COVID-related disruptions and building conversions. Occupancy rates followed a similar trend, reaching a high of 70.3% in 2019 before falling sharply to 53.2% in 2020. As the inventory contracted, occupancy began to rebound, reflecting a consolidation of demand into the remaining supply. By 2024, the number of rooms had partially recovered to 2,354, with occupancy rising to 61.3%.

Since 2022, six hotels have been approved and are expected to add approximately 685 hotel rooms to Medford's current stock. These include plans for a Hilton, an Everhome Suites, and a WoodSpring Suites. The WoodSpring suites, which has 122 rooms, is currently under construction.

Exhibit 41. Hospitality Real Estate Inventory (by Rooms) and Occupancy (Annually-Smoothed), Medford, 2007-2024



Source(s): Costar, 2024; CAI, 2025.

EMPLOYMENT LANDS SUFFICIENCY

This section presents the Employment (Commercial and Industrial) Buildable Lands Inventory (E-BLI) for the City of Medford for the 2025 to 2045 period. The purpose of the analysis is to estimate the demand for employment land in Medford, document the current inventory of commercial and industrial land in the City and UGB, and determine whether Medford has enough land – and the right types – to accommodate expected and targeted growth.

Methodology

This analysis is consistent with the requirements of statewide planning Goal 9 and the Goal 9 administrative rule (OAR 660-009). This memo summarizes analysis of Medford's supply of, and demand for, "employment" land, consisting of both Industrial use⁵ and other employment uses⁶.

The analysis that follows represents an update of the previous (2007-2008) Buildable Land Inventory for the City of Medford. This analysis is comprised of the following steps:

1. Employment land supply is summarized and characterized based on City of Medford-provided inventory data. Supply is segmented by General Land Use Plan (GLUP) designation and by category (vacant, redevelopable, partially-developed, etc.).
 - a. Short Term Land Supply, as required by Oregon administrative code, is identified, along with 25% target supply.
2. Employment land demand is modeled based on a twenty-year forecast for Medford employment by sector. Employment growth is translated into land demand categories corresponding to supply by GLUP designation. Land demand is identified by converting employment growth by land use into acreage figures utilizing benchmark employment densities from similar Oregon cities.

⁵ OAR 660-009 0005(3) defines "Industrial Use as "employment activities generating income from the production, handling or distribution of goods. Industrial uses include, but are not limited to: manufacturing; assembly; fabrication; processing; storage; logistics; warehousing; importation; distribution and transshipment; and research and development. Industrial uses may have unique land, infrastructure, energy, and transportation requirements. Industrial uses may have external impacts on surrounding uses and may cluster in traditional or new industrial areas where they are segregated from other non-industrial activities.

⁶ OAR 660-009 0005(6) defines "Other Employment Use: " all non-industrial employment activities including the widest range of retail, wholesale, service, non-profit, business headquarters, administrative and governmental employment activities that are accommodated in retail, office and flexible building types. Other employment uses also include employment activities of an entity or organization that serves the medical, educational, social service, recreation and security needs of the community typically in large buildings or multi-building campuses.

- a. Employment growth not requiring vacant land is addressed per OAR 660-024-0050(4) requirement that Medford demonstrate that some demand can reasonably be accommodated by increasing the development capacity of land already inside the city prior to expanding the UGB. This can happen on potentially redevelopable sites, as infill on partially-developed sites, or in existing built space (market vacancy) – in addition to new employment on vacant land.

This analysis is based on Jackson County Assessor and parcel data, as well as City of Medford buildable land inventory data, produced from mid-2024 through February 2025. Initial GLUP and buildable / not-buildable segmentation and follow up analysis was performed by the City of Medford.

Analysis of the results, methodological refinement and extension, and exhibits and documentation of findings were performed by Community Attributes, Inc.

Comprehensive Plan Designations

For the purposes of this buildable land inventory, “employment” lands comprise parcels with the following General Land Use Plan (GLUP) designations, which are consistent with the previous BLI conducted in 2007-2008:

- Commercial & City Center (CM & CC)
- Service Commercial (SC)
- General Industrial (GI)
- Heavy Industrial (HI)

In addition, a small number of parcels with the Airport (A) GLUP designation were also assessed in alignment with the 2021 Rogue Valley International – Medford Airport Master Plan.

Land Inventory Categories

The following categories of buildable, developed, and unbuildable land were identified by the City of Medford in collaboration with CAI for this update of the City’s E-BLI. Land inventory categories combine data from the Jackson County Assessor such as property class data with permitting data from the City of Medford, critical areas data, valuation calculations, direct observation, and information from related planning documents.

Developed: Properties with improvements that are considered committed to existing uses for the 20-year planning period. Developed land also includes lots with redevelopment capacity, which are categorized separately (see below); the capacity of developed but redevelopable lots is based on a ratio of improvement value to land area.

Vacant: Per EOA 660-009-0005 (14a), parcels that are one half-acre or larger and not currently containing permanent buildings or improvements are considered vacant and available for development.

Partially Vacant: Parcels that are five acres or larger where improvements occupy only a portion of the site, leaving greater than 0.5 acres for subdivision and/or additional infill development, are considered partially vacant. The undeveloped portions of such lots are considered available for development.

Redevelopable: This category is comprised of developed parcels greater than 0.5 acres in size with low improvement values in relation to their land area that may indicate the potential for redevelopment for the 20 year planning period. Parcels with an improvement value to land area ratio of \$2.50 per square foot or less are considered available for development⁷.

Unbuildable: Consistent with state guidance on buildable lands inventories, CAI intersected and deducted the following constraints from the buildable lands inventory and classified those portions of tax lots that fall within such areas as constrained, unbuildable land:

- *Floodplains.* Flood insurance rate maps from the Federal Emergency Management Agency (FEMA) were used to identify portions of parcels lying within floodways and / or 100-year flood zones. Special Flood Hazard Areas (SFHAs) include both floodplains and floodways. Floodway areas were removed and 100-year floodplain was not.
- *Wetlands.* The State of Oregon's Locally Significant Wetlands inventory was used to identify areas inundated or saturated by surface water or ground water.
- *Riparian Corridors.* Water areas, fish habitat, adjacent riparian areas, and wetlands within the riparian area boundary.

The Jackson County property class system also indicates those tax lots considered completely unbuildable for reasons of size, configuration, contamination, etc.

Special – Airport: For this inventory, the City of Medford and CAI have identified parcels that may be available for development per the Rogue Valley International Medford Airport 2021 Master Plan. Such parcels are maintained in a separate category and may have constraints that are unique to airport areas⁸.

Public: Lands in public or quasi-public ownership are considered unavailable for commercial or industrial development. This includes lands in federal, state, county, or city ownership as well as lands owned by churches and other institutional uses. These

⁷ *Previous inventory experience coupled with extensive stakeholder engagement with industrial site selection professionals, brokers, and developers suggest that this ratio of improvement value to land area may usefully characterize parcels with minimal barriers to being physically redevelopable.*

⁸ These parcels generally correspond to those identified in the map of page 4-71 (Figure 4-22: Rogue Valley International-Medford Airport, Non-Aeronautical Sites Map) and described in the section entitled "Non-Aeronautical Sites Evaluated" beginning on page 4-69 and lie both within and outside the Airport fence line. Note that, due to discrepancies in parcel boundaries, and potentially updated information on vacancy status, some sites vary in shape or differ from those evaluated in the Master Plan.

lands are identified by the City of Medford. Per the above, some public lands classified as Airport properties were included in a special category for further consideration.

Employment Land Supply

The **City of Medford and its UGB, in 2025, contain a total of 5,649 acres of employment land**, including commercial and industrial lands across five identified GLUP categories (including, in this iteration, a small number of vacant Airport parcels). This total supply includes non-buildable parcels (such as developed, public, and unbuildable), as well as developable parcels (including vacant, partially developed, and redevelopable). In the **2007 BLI, a total of 4,437 acres of employment lands were identified in the City and UGB**. Since that time, due in part to a major UGB expansion aimed at increasing the supply of land needed for 20-year growth forecasts, total employment land supply grew by around 27%.

Due in part to the expansion of the UGB, **vacant employment land supply was found to have increased by around 15% since 2007** (from 1,054 ac to 1,213 ac in 2025). In addition to vacant land, this analysis examines other categories of supply and includes individual sites that may face constraints and barriers to future development.

The following sections detail findings for buildable and other employment lands and compare findings to those of the 2007 BLI.

Findings

Exhibit 42 summarizes the findings of an updated analysis of the supply of employment (commercial and industrial) land inventory in the City of Medford and its UGB as of 2025. This analysis found that a **total buildable area of around 1,867 acres** exists in the **City and UGB** combined. This included previous categories of vacant and redevelopable land, but also new categories of partially vacant Airport acreage that could be evaluated and made available for future development.

The largest component of buildable supply was **vacant parcels, totaling around 1,213 acres**. It should be noted that around 50 vacant parcels, totaling 62 acres of land, lay within the City's Special Flood Hazard Area, and as such, may be subject to increased constraints to new development.

The buildable portion of large (greater than 5 acres) **partially vacant** sites totaled another **315 acres** comprising around 17% of Medford's buildable land supply. Potentially **redevelopable acreage** was **approximately 225 acres**, representing 12 % of buildable supply. Finally, 115 acres of Airport parcel area may be available for non-aviation employment uses per the Airport master plan.

Exhibit 42. Buildable Employment Lands by BLI Category, Medford, 2025

General Land Use Plan Designation	Buildable Employment Lands (ac)				
	Vacant	Partially Vacant (Vacant Portion)	Redevelopable	Special Airport	Total
Commercial & City Center (CM & CC)	346.6	128.9	124.1	-	599.6
Service Commercial (SC)	218.9	52.0	12.2	-	283.0
General Industrial (GI)	347.5	32.8	74.2	-	454.5
Heavy Industrial (HI)	300.1	11.1	104.1	-	415.3
Airport (A)	-	-	-	115.0	115.0
Total (Employment) (ac)	1,213.0	224.7	314.6	115.0	1,867.2

Sources: City of Medford, 2025; Jackson County Assessor, 2024; Oregon Employment Department, 2024; CAI, 2025.

In addition to the buildable categories, a total **non-buildable area of 3,782 acres** of employment land was identified across the City of Medford and UGB (**Exhibit 43**). That included around **2,309 acres of developed** (already built) sites without additional development capacity per this methodology. Another **523 acres were deemed unbuildable** as they were subject to wetlands, riparian corridors, and/or lay within flood zones or floodplains⁹. Public lands totaling 955 acres were also assumed to be unavailable for commercial or industrial development over the planning time horizon.

Exhibit 43. Not Buildable Employment Lands by BLI Category, Medford, 2025

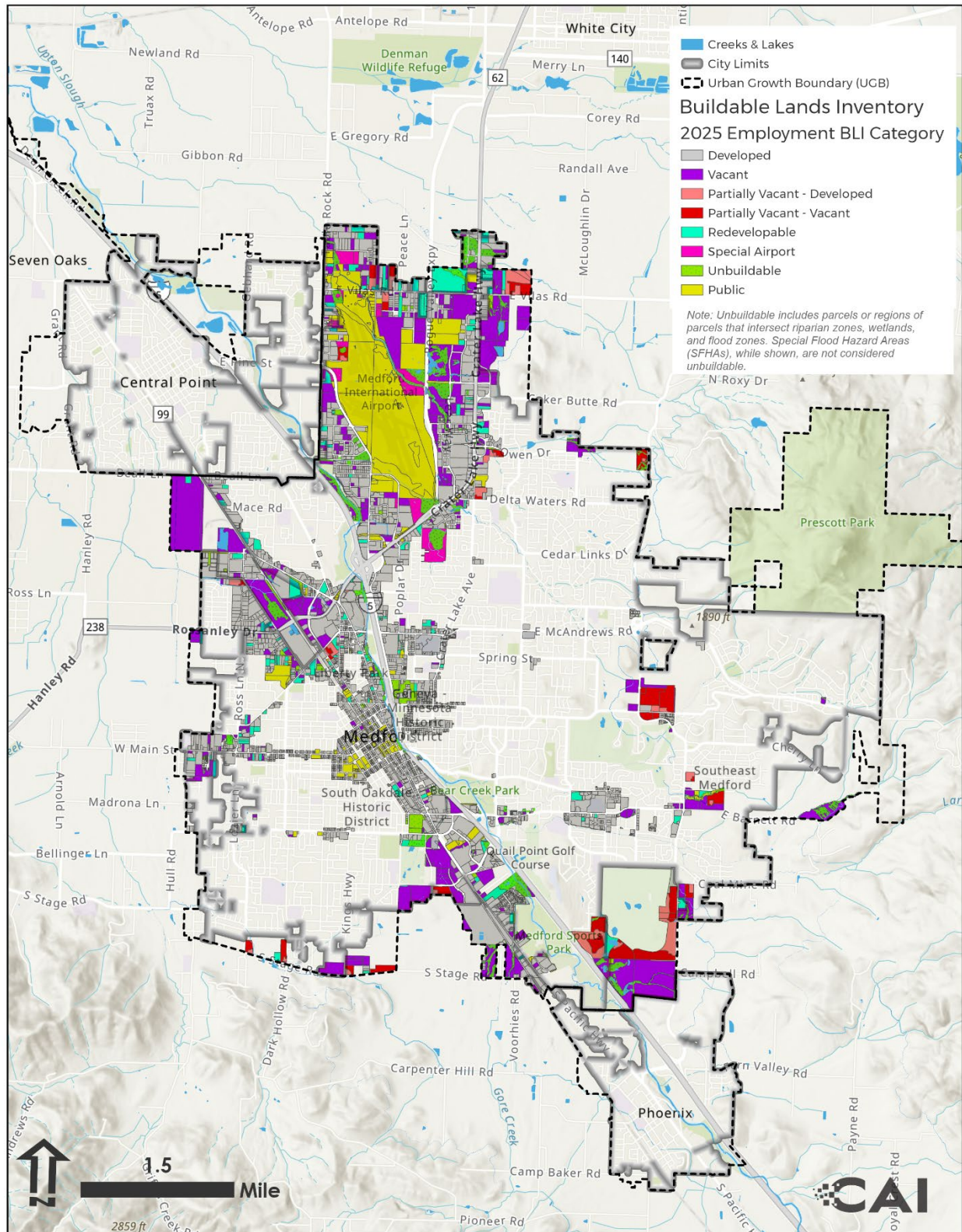
General Land Use Plan Designation	Not Buildable Employment Lands (ac)			
	Developed	Public	Unbuildable	Total
Commercial & City Center (CM & CC)	1,070.9	134.3	182.4	1,387.7
Service Commercial (SC)	264.4	5.6	35.3	305.3
General Industrial (GI)	525.4	97.3	147.6	770.3
Heavy Industrial (HI)	443.0	5.5	110.6	559.2
Airport (A)	-	712.3	47.5	759.8
Total (Employment) (ac)	2,303.8	955.0	523.4	3,782.2

Sources: City of Medford, 2025; Jackson County Assessor, 2024; Oregon Employment Department, 2024; CAI, 2025.

The map in **Exhibit 44** shows the spatial distribution of Medford's buildable employment land supply in 2025 – including within the expanded UGB area. See **Exhibits 54-57** in the **Appendix** for additional maps which zoom in to highlight specific areas of interest related to buildable lands.

⁹ Note that while Special Flood Hazard Areas were mapped, employment parcel areas intersecting this zone were not deducted from otherwise buildable acreages.

Exhibit 44. Map of Buildable Employment Land Supply by Category, Medford, 2025



Sources: City of Medford, 2025; Jackson County Assessor, 2024; Oregon Employment Department, 2024; CAI, 2025.

Comparison with Previous BLI

Medford's UGB grew dramatically by more than 4,000 acres in a major UGB expansion that took place in 2018. This included 1,658 acres of land for future residential and employment development. Thus, where the total UGB area in the 2007 BLI was 18,086 ac, this has grown by 22% to 22,128 acres. This expansion is one driver behind what we found to be an **increase in buildable employment land** across the UGB.

Apart from the growth of the UGB, there are differences between the findings of the 2007 BLI and the current iteration due to methodological differences. Where some vacant airport acreage was categorized as developed or public and unavailable for development in 2007, these have been further scrutinized for potential developability in this BLI, adding to the potentially buildable supply while lowering the developed acreage figure by comparison (**Exhibit 45**). In addition, this analysis added modest acreage to the potentially redevelopable category by identifying parcels with low improvement value to land area ratios; these parcels are more likely to be redevelopable because the structures on them are of little value, suggesting that they are either much smaller than allowable under the zoning code, or in poor condition and potentially appropriate for replacement.

Exhibit 45. Employment Lands Comparison by BLI Category, Medford, 2007 & 2025

2025		Buildable Employment Lands (ac)				
General Land Use Plan Designation	Vacant	Potentially Redevelopable	Partially Vacant	Special Airport	- Total Buildable	Total Not Buildable
Commercial & City Center (CM & CC)	347	129	124	-	600	1,388
Service Commercial (SC)	219	52	12	-	283	305
General Industrial (GI)	347	33	74	-	454	770
Heavy Industrial (HI)	300	11	104	-	415	559
Airport (A)	-	-	-	115	115	760
Total (Employment) (ac)	1,213	225	315	115	1,867	3,782

2007		Buildable Employment Lands (ac)				
General Land Use Plan Designation	Vacant	Potentially Redevelopable	Partially Vacant	Special Airport	- Total Buildable	Total Not Buildable
Commercial & City Center (CM & CC)	209	105	N/A	N/A	314	1,304
Service Commercial (SC)	50	27	N/A	N/A	77	231
General Industrial (GI)	445	271	N/A	N/A	716	676
Heavy Industrial (HI)	350	89	N/A	N/A	439	680
Total (Employment) (ac)	1,054	492	-	-	1,546	2,891

Sources: City of Medford, 2025; Jackson County Assessor, 2024; Oregon Employment Department, 2024; CAI, 2025

Overall, **vacant acreage in the City and UGB has increased**, even with deductions of otherwise buildable parcels intersecting critical environmental areas. This is in part due to growth in the overall size of the City and UGB. It should be noted that around 50 vacant parcels, totaling 62 acres of land, as mentioned above, lay within the City's Special Flood Hazard Area, and as such, may be subject to increased constraints to new development.

Potentially redevelopable acreage is somewhat lower in 2025 in part due to utilization of a different valuation ratio. The overall increase in UGB area accounts for the increase in developed acreage from 2007 to 2025. Partially vacant acreage in this analysis was previously combined with the vacant category in 2007, whereas this analysis has disaggregated these sites.

Short-Term Land Supply

The Goal 9 Administrative Rule (OAR 660-009) includes provisions that require certain cities to ensure an adequate short-term supply of industrial and other employment lands. Short term supply refers to land that can be **ready for construction in one year** based on **"engineering feasibility"**¹⁰.

For this assessment, CAI and the City of Medford have interpreted the short term land supply to include a subset of sites within the above described overall employment land supply that:

- Have road access,
- Have minimal contamination or environmental constraints (or are undergoing remediation currently),
- And are served with basic infrastructure (stubbed at property or adjacent) including power, water, and sanitary sewer.

Per these criteria, the City of Medford's **short term supply** of employment land sites amounts to a total of **537 parcels** comprising **1,130 buildable acres** of vacant or partially land within the city and / or urban growth boundary. Key pieces of this short term supply include four of the city's five largest single parcel vacant employment sites available at the time of this analysis, including two 50 acre airport adjacent sites, the 135 acre Boise Cascade site on the west side of town, and the 55 acre Timber Products site southeast of Boise Cascade on Highway 99.

Almost half of these short term supply sites were located surrounding the airport, most of which are industrially-zoned, with a smaller number of commercially-zoned parcels and three SC parcels. Half of this in turn lay in the two fifty acre vacant parcels located

¹⁰ OAR 660-009-005(10) defines short term supply as follows: "...suitable land that is ready for construction within one year of an application for a building permit or request for service extension. Engineering feasibility is sufficient to qualify land for the short-term supply of land. Funding availability is not required. "Competitive Short-term Supply" means the short-term supply of land provides a range of site sizes and locations to accommodate the market needs of a variety of industrial and other employment uses."

at the eastern boundary of the airport along the Rogue Valley Expressway. In addition to the large single-parcel sites described, the short term supply also included a grouping of mid to large size sites around the Boise Cascade and Timber Products sites along Highway 99 northwest of downtown; and a large grouping of vacant sites east of the Stewart Meadows Golf Course along the southern reaches of 99.

In addition to current supply, the Rule requires cities within an MPO – including Medford – to make a commitment to provide a competitive short-term supply of land and establishes a **target of 25% of total UGB employment land supply**. If this is not possible, the city may set an alternative target based on this EOA. As total employment land supply in Medford amounts to 5,649 acres, a target of 25% would represent **1,412 acres**. As Medford’s identified short term supply of 1,130 acres amounts to 20% of total supply, the city has a current shortage of 282 acres. Medford must adopt comprehensive plan policies to increase the competitive supply¹¹ of short term land available for employment growth to 25%. Alternatively, based on the findings within this EOA, the city may opt to adopt a lesser target if it deems current supply or less adequate to meet the needs of forecast land demand and site needs based on its economic development vision.

Employment Land Demand

In this section, future commercial and industrial employment growth is modeled and converted into an approximation of land demand to accommodate this growth.

Total growth and growth by sector is represented by a twenty year employment forecast for the Medford UGB (2025-2045). This employment growth is then mapped to generalized land use typologies (commercial and industrial) corresponding to Medford’s General Land Use Plan (GLUP) designations for employment land. Finally, demand for employment land in terms of net and gross acreage is modeled based on typical employment densities by land use derived from development in other Oregon cities similar in size or economic composition.

Forecast Employment

To provide for an adequate supply of employment (commercial and industrial) sites consistent with plan policies, Medford requires an estimate of the amount of commercial and industrial land that will be needed over the twenty planning period (2025-2045). Demand for commercial and industrial land will be driven by growth and movement of businesses and industries into and within the Medford UGB. One useful measure of business expansion activity is employment growth.

¹¹ A “competitive” short term supply refers to having parcels in a range of sizes and designations to meet the needs of a variety of employers interested in locating or expanding in the city.

Exhibit 30 presents a projection¹² of future employment levels in Medford – in total, and by sector – for the purpose of estimating demand for employment land. Overall, according to custom forecast projections adapted from the Rogue Valley Forecast published by the State of Oregon Employment Department (OED), the Medford UGB is forecast to grow by a modest 1.0% year over year, from an estimated 51,083 jobs to over 62,000 jobs – a **total increase of more than 11,000 jobs** and total growth of 22% above 2025 levels.

Exhibit 46. Forecast of Employment Growth by Land Use Type, Medford UGB, 2025 – 2045

Projected Land Use	2025 Employment	2045 Employment	Employment Growth
Commercial	40,604	50,106	9,502
Industrial	10,479	12,385	1,906
Total	51,083	62,491	11,408

Sources: Bureau of Labor Statistics, 2025; Oregon Employment Department, 2025; CAI, 2025.

Exhibit 46 maps Medford’s forecast employment growth to generalized categories of land use – including industrial and commercial – to relate employment growth to the types of sites that may be required to absorb it over the 20 year planning period. Based on historical growth patterns, sectors like Manufacturing, Wholesaling, and Construction, Resources, and TWU (Transportation, Warehousing, and Utilities) will typically require industrial zoning and site typologies. Other sectors, such as Retail, Leisure & Hospitality, Services, FIRE, and Information will most likely require commercial zoning and site types. The overall proportion of commercial to industrial land needed will remain relatively unchanged – around 80 percent of 2045 jobs will likely require commercial land use types while around 20% would require industrial types.

Land Demand

In this section, projected growth in employment will be translated into land demand based on a number of assumptions. While most new business and related employment growth projected for Medford will be likely require vacant land to accommodate it, not all will. Some growth will likely be absorbed by **vacancy in existing buildings**. Other growth will be accommodated by **redeveloping underutilized sites or by infill development on partially developed or other sites**. **Exhibit 47** incorporates assumptions to illustrate one possible outcome of the allocation of employment to

¹² Forecast employment in Medford is based on an estimate of covered employment in from 2013-2023 provided by the State of Oregon Employment Department (OED), as well as BLS QCEW covered employment estimates for Jackson and Josephine Counties, and the OED published Rogue Valley Forecast 2023-2033. Covered employment does not include all workers in an economy, most notably excluding sole proprietors.

different modes of absorption. Given these assumptions, around 1,520 new employees could be accommodated within existing vacant spaces, around 720 on underutilized land, and another 720 as infill development in partially developed sites. The remaining jobs – around 8,940 new employees – will be assumed to require vacant land over the 2025 to 2045 period.

- **Some employment growth will occur on sites with existing built space.** Some employment will locate in existing buildings, such as multi-tenant light industrial buildings with vacant spaces that can accommodate new tenants. In addition, existing businesses may be able to accommodate new employment. Given Medford’s generally stable industrial inventory – currently comprising 131 buildings with around 2.3 million rentable square feet – and historically very low vacancy, CAI assumes that only around **5% of industrial employment growth** can be accommodated this way over time. By contrast, with the city’s much more sizeable retail (443 buildings with 7.2 msf) and office inventories, combined with healthier vacancy rates for both (in the 5% range), CAI assumes that up to **15% of new commercial employment growth** could be accommodated in this way.
- **Some employment growth will be accommodated on land with additional capacity**, including both potentially redevelopable lands and infill on partially-developed land. On parcels identified in the inventory as potentially redevelopable, sufficient economic surplus may exist to drive private redevelopment by the private sector leading to denser or higher-capacity commercial or industrial facilities. On partially developed sites with sufficient size, additional infill development – such as the addition of new buildings – may occur. CAI assumes that a total of **15% of commercial employment growth** will be accommodated through redevelopment or infill, while – given the lower-density nature of typical industrial typologies – only **10% of industrial employment** can be accommodated in this way.

Exhibit 47. New Employment Absorption by Location, Medford, 2025 – 2045

Projected Land Use	Employment Growth	Existing Built Space	Land with Additional Capacity		
			Redevelopable Land	Partially-Developed (Infill)	Vacant Land
Commercial	9,502	1,425	713	713	6,651
Industrial	1,906	95	10	10	1,791
Total	11,904	1,521	722	722	8,939

Sources: Bureau of Labor Statistics, 2025; Oregon Employment Department, 2025; CoStar, 2025; CAI, 2025. Note: All figures represent number of employees.

For absorption of vacant land, CAI first calculated current / historic employment density (expressed as employees per acre, or EPA) by GLUP category. To do this, site level employment data was summed and divided by the total acreage for developed sites in

each category. The results indicated a range of existing densities in Medford from around 36 EPA for developed Service Commercial sites, down to 5.7 EPA for developed Heavy Industrial sites (**Exhibit 48**). These densities were then combined for generalized commercial and industrial land uses.

Exhibit 48. Employment Density (Employment Per Acre), Medford, 2025

General Land Use Plan Designation	Total 2025 Site Employment	Developed 2025 Site Acreage	Employment Density (Employees per Acre)
Commercial & City Center (CM & CC)	20,944	1,071	19.6
Service Commercial (SC)	9,633	264	36.4
Combined Commercial	30,577	1,335	22.9
General Industrial (GI)	6,493	525	12.4
Heavy Industrial (HI)	2,516	443	5.7
Combined Industrial	9,009	968	9.3

Sources: City of Medford, 2024; ESRI Business Analyst, 2025; CAI, 2025.

Next, forecast growth by generalized land use was converted to a land demand estimate utilizing these current / historic benchmark assumptions for employment density (**Exhibit 49**). At these densities, vacant net land demand (not including additional acreage that will be required for rights-of-way, public facilities, and easements associated with new development, as well as undevelopable portions of sites) would be around **290 acres for commercial**, and **193 acres for industrial** in order to absorb the remaining forecast employment growth through 2045. With the addition of a 25% net to gross conversion factor to account for additional needed facilities and set asides, **total gross land demand would be 604 acres**.

Exhibit 49. Vacant Land Demand, Medford, 2025 – 2045

	Employment on Vacant Land	Employment Density (EPA)	Net Land Demand (Ac)	Gross Land Demand (Ac)
Commercial	6,651	22.9	290	363
Industrial	1,791	9.3	193	241
Total	8,939	-	483	604

Sources: Bureau of Labor Statistics, 2025; Oregon Employment Department, 2025; ESRI Business Analyst, 2025; CAI, 2025.

Sufficiency of Employment Land

In this section, employment land supply is reconciled with demand in aggregate acreage by land use types corresponding to combined GLUP categories. Then, site needs are examined in terms of numbers of site by size brackets for each land use type. Finally, needed site characteristics related to Medford’s vision for economic development and possible target industries is examined.

Comparison of Employment Land Supply & Demand

Exhibit 50 summarizes and compares the supply of vacant employment land (presented previously in detail in **Exhibit 42**) by combined GLUP categories for industrial and commercial¹³ with the demand for employment land (from **Exhibit 49**). It should be noted that, while raw supply in acreage terms reflects the volume of land available for commercial and industrial development, it does not necessarily reflect the suitability of such lands or their attractiveness to the development market. Factors such as location, zoning and regulation, adjacent uses, and the level of transportation and infrastructure service have a large impact on real world development decisions. (The next section, Site Needs, further details site absorption trends and projections by land use category.)

- **Commercial.** Medford has 565 acres of buildable vacant land designated for commercial uses. The employment forecast suggests a projected demand for 363 acres of commercial land in aggregate. **Medford thus has a calculated surplus of around 202 acres of vacant land for commercial uses.**
- **Industrial.** Medford has a raw supply of 648 gross acres of buildable vacant land designated for industrial uses. The employment forecast projects demand for around 241 acres of industrial land. **Medford has more industrial land than the City is projected to need over the 20-year period, with a surplus of 407 gross acres.**

Exhibit 50. Employment Lands Sufficiency, Medford UGB, 2025-2045

Land Use Type	Vacant Land Supply (Gross Ac)	Land Demand (Gross Ac)	Surplus (Deficit)
Commercial	565	363	202
Industrial	648	241	407
Total (ac)	1,213	604	609

Sources: City of Medford, 2024; Bureau of Labor Statistics, 2025; Oregon Employment Department, 2025; CAI, 2025.

In addition to vacant land, Medford was found to have a total of **317 acres of other types of commercial-designated land supply** that could be developed, redeveloped, or expanded with infill development for additional employment growth. These included 136 acres of redevelopable, and 181 acres of partially-developed land.

Medford was also found to have a **total of 222 acres of other types of industrial-designated land supply** that that could be developed, redeveloped, or expanded with

¹³ “Commercial” includes GLUP designations Commercial & City Center (CM & CC) Service Commercial (SC); “Industrial” includes GLUP designations General Industrial (GI), and Heavy Industrial (HI).

infill development for additional employment growth, including 178 acres of redevelopable, and 11 acres of partially-developed land.

In addition, Jackson County Airport Authority owns a variety of non-aeronautical parcels around the Rogue Valley Medford International Airport, in a range of sizes, configurations, and zoning. The 2021 Airport Master Plan identified **15 parcels (13 industrial and 2 commercial)** that were available for development of non-aeronautical facilities. This analysis expanded on that inventory with new data indicating another half dozen vacant parcels might now be available in addition to the original 15, totaling **up to 115 acres** of additional supply both within and outside the Airport fence line.

Site Needs

OAR 660-009-0015(2) requires the EOA identify the number of sites, by type, reasonably expected to be needed for the 20-year planning period. Types of needed sites are based on the site characteristics typical of expected uses. The Goal 9 rule provides flexibility in how jurisdictions conduct and organize this analysis. For example, site types can be described by plan designation (i.e., heavy or light industrial), they can be described by general size categories that are defined locally (i.e., small, medium, or large sites), or can be identified by industry or use (i.e., manufacturing sites or distribution sites). For this analysis, site sizes and types were analyzed for vacant parcels from this inventory for each commercial and industrial General Land Use Plan designation across Medford in conjunction with detailed site-level employment data.

An analysis of sites by size per General Land Use Plan designation revealed that Medford is lacking in very small sites designated for Service Commercial uses in particular (**Exhibits 51 & 53**). At the time of this analysis, developed Service Commercial (SC) tax lots under a half-acre in size constituted nearly 83% of all SC sites. If future demand for SC sites is similarly centered around smaller sites, Medford may have to accommodate this growth in other ways, such as on Commercial or City Center designated supply of which this analysis found many more very small vacant sites available and which are generally less restrictive in terms of allowable uses than the SC zone which is intended for businesses that serve the needs of residents without overwhelming the surrounding residential neighborhoods.

Exhibit 51. Supply of Vacant Sites by Size & GLUP, Medford UGB, 2025

General Land Use Plan Designation	Less than 0.5 ac	0.5 to 1 ac	1-5 ac	5-20 ac	More than 20 ac
Commercial & City Center (CM & CC)	215	35	48	14	3
Service Commercial (SC)	33	7	9	5	3
General Industrial (GI)	37	51	52	19	4
Heavy Industrial (HI)	41	26	19	7	3
Total	326	119	128	45	13

Sources: City of Medford, 2024; CAI, 2025.

For industrial designations, small sites under 0.5 acres in size actually represent over a third of existing developed sites within the Heavy and General Industrial designations. Generally, sufficient, vacant very small sites currently exist in both designations, and Medford may also leverage redevelopment of certain underutilized small sites or infill development in order to meet the need for future growth related to demand for small sites in industries such as artisanal food and beverage manufacturing, construction contractors, and various wholesaling activities. Leasing of existing multi-tenant industrial spaces can also fulfill demand in this category.

Very large industrial sites, however, are a uniquely strong asset for cities to attract major manufacturing, distribution, or warehousing uses that can singlehandedly employ hundreds or drive other industry growth related to supply, distribution, or intermediate production. Medford's industrial areas do have a modest number (7) of very large vacant sites greater than 20 gross acres in size available for growth, though each of these sites is impacted to some extent by critical areas. (Note that two additional sites of 30 and 38 acres in size designated Special – Airport are also potentially available for future industrial growth per the Airport master plan). Beyond sheer size, other factors including surrounding land uses, infrastructure and transportation access, site configuration, land assembly potential, and market availability are additionally important to companies and site selectors considering location in Medford.

An analysis of existing developed sites across Medford in the four GLUP designations at the heart of this inventory revealed patterns of site size utilization by category that may be useful in characterizing future demand. In **Exhibit 52**, developed sites by size category were analyzed in detail to reveal how each zone has consumed land in Medford in recent years.

Exhibit 52. Developed Site Sizes by GLUP, Medford UGB, 2025

General Land Use Plan Designation	Number & Percent of Developed Tax Lots									
	Less than								More than	
	.5 ac	%	.5 to 1 ac	%	1-5 ac	%	5-20 ac	%	20 ac	%
Commercial & City Center (CM & CC)	1,345	66%	289	14%	331	16%	61	3%	9	0.4%
Service Commercial (SC)	508	83%	57	9%	41	7%	5	1%	0	0.0%
General Industrial (GI)	162	36%	130	29%	132	30%	20	5%	0	0.0%
Heavy Industrial (HI)	129	40%	83	26%	100	31%	10	3%	1	0.3%
Total	2,144	63%	559	16%	604	18%	96	3%	10	0.3%

Sources: City of Medford, 2024; CAI, 2025.

The following sections detail potential demand scenarios for each commercial and industrial GLUP designation by needed site type based on current and historic utilization of employment land in Medford.

Service Commercial

Medford's Service Commercial zone allows for professional offices, hospitals, and limited service commercial uses. This zone is customer-oriented but restricts retail development, making it suitable for locations near residential areas. Total developed acreage within the Service Commercial (SC) designation is currently 264 acres across 612 parcels with an average site size of 0.43 acres and a median (most frequent) site size of 0.18 ac. Total employment across all SC sites was 9,633 jobs, amounting to 19% of total 2025 city employment. Thus, overall job density on Medford's Service Commercial sites amounts to around 36.4 employees per acre (EPA). If a similar proportion of land utilization by site size will be demanded in the future, the city would require a range of sites heavily concentrated in very small sites under 0.5 acres, with a handful of additional small and mid-sized sites up to five acres in size (**Exhibit 53**). Currently, the supply of vacant very small sites is lacking while a large surplus of small and mid-size sites is available.

Exhibit 53. Demand & Supply of Vacant Sites by Size & GLUP Designation, Medford UGB, 2025-2045

General Land Use Plan Designation	Less than .5 ac		.5 to 1 ac		1-5 ac		5-20 ac		More than 20 ac	
	Demand	Supply	Demand	Supply	Demand	Supply	Demand	Supply	Demand	Supply
Commercial & City Center (CM & CC)	181	215	38	35	44	48	8	14	1	3
Service Commercial (SC)	108	33	12	7	9	9	1	5	-	3
General Industrial (GI)	34	37	27	51	28	52	5	19	-	4
Heavy Industrial (HI)	34	41	22	26	27	19	3	7	-	3
	357	326	99	119	108	128	17	45	1	13

Sources: City of Medford, 2024; ESRI Business Analyst, 2025; CAI, 2025.

City Center & Commercial

Total developed acreage within the City Center and Commercial (CC/CM) designations is currently 1,071 acres across 2,036 parcels with an average site size of 0.52 acres and a median (most frequent) site size of 0.24 ac. Total employment across all CC/CM sites was 20,944 jobs, amounting to 41% of total 2025 city employment. Thus, overall job

density on Medford's City Center and Commercial sites amounts to around 19.6 employees per acre (EPA). If a similar proportion of land utilization by site size will be demanded in the future, the city would require a range of sites again heavily concentrated in very small sites under 0.5 acres, with three to four dozen additional small and mid-sized sites up to five acres in size, and a half dozen mid-large (**Exhibit 53**) sites. Currently, the supply of vacant very small sites is more than sufficient to accommodate this demand, while the supply of small and mid-size sites is nearly sufficient to meet demand, and supply of large sites exceeds demand.

General Industrial

Total developed acreage within the General Industrial (GI) designation – located almost entirely surrounding the airport – is currently 525 acres across 459 parcels with an average site size of 1.14 acres and a median (most frequent) site size of 0.65 ac. Total employment across all GI sites was 6,493 jobs, amounting to 13% of total 2025 city employment. Thus, overall job density on Medford's City Center and Commercial sites amounts to around 12.4 employees per acre (EPA). If a similar proportion of land utilization by site size will be demanded in the future, the city would require a range of sites evenly distributed amongst very small, small and mid-sized sites, with a half dozen mid-large sized sites needed (**Exhibit 53**). Currently, excess supply exists for all site buckets for General Industrial land.

Heavy Industrial

Medford's Heavy Industrial (HI) designation – generally located along the rail ROW / Central Ave. – is designated for industrial uses that may generate significant impacts on the surrounding environment with activities like chemical manufacturing, mining, and power production. The district is characterized by the potential for noise, vibration, air pollution, and other industrial hazards and requires performance standards and buffering from residential. Total developed acreage within the Heavy Industrial (HI) is currently 443 acres across 363 parcels with an average site size of 1.22 acres and a median (most frequent) site size of 0.59 ac. Total employment across all HI sites was 2,516 jobs, amounting to around 5% of total 2025 city employment. Thus, overall job density on Medford's Heavy Industrial sites currently amount to around 5.7 employees per acre (EPA). If a similar proportion of land utilization by site size will be demanded in the future, the city would require a range of sites in the very small to mid-large sized range (**Exhibit 53**). Currently, supply approaches or exceeds demand for all size buckets except 1-5 acre sites which are somewhat lacking.

Summary of Employment Lands Sufficiency Findings

- **The City of Medford and its UGB, in 2025, contain a total of 5,649 acres of employment land**, including commercial and industrial lands
- Since Medford's 2007 Buildable Lands Inventory total employment land supply grew by around 27%, due in part to a major UGB expansion aimed at increasing the supply of land needed for 20 year growth forecasts. **Vacant employment land supply was found to have increased by around 15% since 2007** (from 1,054 ac to 1,213 ac in 2025).

- Short term supply refers to land that can be **ready for construction in one year** based on “**engineering feasibility.**” Per these criteria, the City of Medford’s **short term supply** of employment land sites amounts to a total of **537 parcels** comprising **1,130 buildable acres** of vacant or partially land within the city and / or urban growth boundary.
- **Total gross land demand for employment land is estimated to be 604 acres**, of which 363 acres is for commercial uses and 261 is for industrial.
- With 565 acres of buildable vacant land designated for commercial uses, **Medford may have a surplus of around 202 acres of vacant land for commercial uses.**
- With a raw supply of 648 gross acres of buildable vacant land designated for industrial uses, **Medford has more industrial land than the City is projected to need over the 20-year period, with a surplus of 407 gross acres.**

Sites Specifics

- **Very large industrial sites (20+ acres)** are a rare but strategic asset in Medford, with 7 such sites available (some with constraints) and 2 more potential airport-adjacent sites.
- The supply of Heavy Industrial sites is sufficient for most site sizes, **except for 1–5 acre sites**, which are **somewhat lacking**. If this sector is one that Medford wishes to strategically invest in, the city could consider rezoning land or providing support for aggregating sites to increase its inventory of larger Heavy Industrial sites.
- Current supply of General Industrial sites exceeds projected demand for all site size categories, especially smaller sites. Future needs are expected to span very small to mid-large sites.
- Medford lacks very small vacant sites (<0.5 acres) in Service Commercial (SC) zones, despite high demand. Growth in this sector may shift to Commercial or City Center zones, which allow similar uses and have more small vacant sites available.
- Small and mid-size sites in the City Center & Commercial (CC/CM) zones are nearly sufficient while large sites exceed projected demand.

COMMUNITY ECONOMIC DEVELOPMENT PRIORITIES

Public Engagement

Following an inclusive engagement plan this project conducted several forms of engagement designed to speak directly with a diverse audience of stakeholders in Medford and solicit insights into fundamental dynamics underlying the Medford economy. These activities included interviews, focus groups, a public studio, and a regional business and resident survey. This engagement summary reviews the findings identified through these activities. A full report of engagement materials is included in the **Appendix**.

Key Engagement Findings

Outreach Overview & Demographics

- Overall, the public survey received 472 responses from residents and businesses owners throughout Jackson County. Exactly 198 respondents lived in Medford, 175 worked in Medford, and 45 own or manage a business in Medford. (Survey)
- Of the 146 total businesses surveyed, 97 (66%) of them have four or less employees, indicating most are small businesses. Of the Medford businesses, the large majority (37) were small businesses, or those with less than 50 employees. (Survey)
- Just over half (51%) of Medford's businesses represented in the survey have been in operation for over ten years. (Survey)
- Interviews included a diverse pool of stakeholders in Medford, including City Councilors and Planning Commissioners, developers and property owners, as well as business owners and residents. (Interviews)

Population Growth, Demographics and Quality of Life

- Medford is widely known as a hub for retirees, but there is an increasing demand for expanded opportunities for all age groups. Some stakeholders also believe that Medford needs to expand its population base and invest in further development. (Interviews)
- 17% of residents highlighted the importance of supporting families through family-oriented amenities and institutions, with suggestions including improved education, affordable childcare, attractions such as theme parks, roller rinks, additional community centers, and boutique retail. (Survey)
- Both housing affordability and availability is a growing concern to stakeholders, as is the lack of childcare. (Interviews)
- Local stakeholders believe there may be a mismatch between the Medford population's needs and available resources. (Interviews)

Attracting & Retaining Young People

- Across several questions, residents emphasized the need to attract and retain young people by expanding employment, educational, and entertainment opportunities in Medford. When asked how to attract and retain young people in Medford, respondents suggested expanding employment, educational, and entertainment opportunities in Medford. (Survey)

Leveraging Medford's Regional Position

- While Medford is described as a pass-through city, stakeholders desire to capture more economic benefit locally through better leveraging Medford's role as a regional hub. (Interviews)
- Medford's population base and strategic location positions it as a regional leader, but it has struggled with creating attractions that anchor residents and visitors to the city. (Interviews)

Downtown Revitalization

- Many stakeholders, including City officials, see downtown as a reflection of the city’s overall health and are dedicated to supporting small business, increasing the residential population and making it a known destination to “live, work and play”. (Interview)
- Local planning efforts, as depicted in the Downtown 2040 Plan, are aimed at improving the built environment of Medford’s downtown area. Some participants describe infrastructure limitations — including stormwater, sewer, and mobility issues — as one of the limiting factors for further development and growth. Issues related to these pieces of key infrastructure can cause hidden costs or delay infill projects, particularly in older areas such as downtown. (Interviews)
- In Medford’s downtown, the Livability Team and its public and non-profit partners work to improve public safety and address the needs of unhoused residents in the community. (Interviews)
- Like local leaders, Medford respondents (42%) would like to see additional improvements to Medford’s downtown and 27% envision one activated by events and cultural attractions. (Survey)
- In addition, downtown is seen as a reoccurring focus for revitalization efforts over the past two decades. There is support for dedicating time and resources into supporting small businesses in the area. (Interviews)

Business Climate and Workforce

- When Medford business owners were asked to rank business challenges in order of importance, business owners, on average, ranked finding qualified employees, increased labor cost and retaining employees highest. (Survey)
- When asked to rank potential economic advantages and disadvantages, Medford respondents ranked workforce availability and access to suppliers and utilities highest as the most important. (Survey)
- Current perceptions around equal access and opportunity in Medford’s economy vary, with 15% of residents citing allocation of social services, another 15% business services, and 11% cost barriers (among others) as important concerns. (Survey)
- Medford employers mentioned inflation and taxes as economic factors with significant impacts to business. State-level regulation was attributed as the source of increased taxes in 30% of their respective responses, while inflation or interest rates have the most significant impact for 50% of businesses. (Survey)

Tourism and Hospitality Investment

- Tourism is a strong industry in Jackson County, and stakeholders have a strong desire to invest in the hospitality and recreational offerings in Medford to capture more of that thriving industry. (Interviews)

- When asked about other cities Medford might take lessons from, 35% of respondents cited Bend, Oregon as a leader in terms of regional attraction and outdoor recreation. (Survey)

Economic Diversification and Business Attraction

- Several Stakeholders largely expressed a desire to expand economic opportunity in Medford to create a diverse, thriving economy. Local leaders see potential for Medford to attract satellite offices. By leveraging the proximity to major tech hubs like Portland and San Francisco, Medford could build a more diverse economy. (Interviews)
- Some stakeholders suggest asset-based community and economic development as a path forward to establishing a draw in Medford. (Interviews)

Vision, Planning and Long-Term Strategy

- Stakeholders largely wish for Medford to develop a more cohesive and unified economic vision for the future.
- Medford residents were asked several open-ended questions on opportunities to improve the city and their vision for the future. Overall, residents believe there is an opportunity to revitalize downtown, improve quality of life and strengthen the local economy.
- From an economic development perspective, Medford respondents favor business support – for both new and existing companies, as strategic opportunities. This approach was also favored by the 19% of respondents who believed that helping small businesses would lead to improvements.

STRATEGIC THEMES AND IMPLICATIONS FOR POLICY

Strengths, Weaknesses, Opportunities, and Threats (SWOT) Analysis

This SWOT analysis is a strategic planning tool that assesses Medford's internal strengths and weaknesses, as well as external opportunities and threats.

Strengths

Internal attributes that support Medford's economic vitality.

- **Strategic Regional Hub:** Medford functions as the economic and service center for Southern Oregon and Northern California, with strong transportation assets including the I-5 corridor and the Rogue Valley International Airport.
- **A High Quality of Life:** Medford balances a lower cost of living (compared to the region), accessibility, local services, recreation, and economic opportunity.
- **A Diversified Economic Base:** Medford's economy includes agriculture, manufacturing, retail, tourism, technology startups, healthcare, and more.
- **Strong Medical Sector:** Asante and Providence anchor a robust healthcare ecosystem, attracting patients from across the region.
- **Pro-Business Climate:** Medford has a reputation for being open to development, with a responsive planning department and customer-friendly permitting.
- **Sports and Recreation Infrastructure:** High-quality facilities like Rogue X and Lithia & Driveway Fields support youth and tournament sports.
- **Natural Amenities and Climate:** Medford boasts year-round recreational access, proximity to Mount Ashland, the Rogue River and Redwoods, and a favorable climate.
- **Committed Leadership:** Political alignment and city leadership are focused on downtown revitalization, housing, and economic growth.
- **A Growing Population:** Population growth, including an influx of young residents and families, supports long term economic health.
- **Regional Draws:** Medford hosts tourism and recreational assets for all ages, including the Craterian Theater, Harry and David, Rogue X and many local wineries.

Weaknesses

Internal challenges that hinder economic progress.

- **Downtown Underperformance:** Despite improvements, downtown lacks vibrancy after hours, retail diversity, and sufficient housing density.
- **Education and Talent Pipeline Gaps:** Medford's residents have attained lower levels of education compared to the region.
- **Workforce and Skill Shortages:** Gaps in workforce for trades, healthcare, and high-skill industries limit business attraction and retention.

- **Branding and Identity Ambiguity:** Medford lacks a clear, compelling identity and often functions as a pass-through rather than a destination. City assets are not currently leveraged through a cohesive branding strategy to attract visitors, residents, or businesses.
- **Limited Housing Options Downtown:** Regulatory and market barriers have stifled multifamily and condo development, constraining efforts to build a 24/7 downtown.
- **Negative Perceptions:** Lingering stigma, concerns around homelessness, and aesthetics of gateway corridors affect investor and visitor confidence.
- **Small Business Space Constraints:** Few flexible spaces exist to support growing startups and scale-ups.
- **Resources for Families:** Key supports such as childcare are in short supply, limiting workforce participation and family retention.
- **Limited Public Transportation:** Gaps in regional transit reduce mobility for workers and visitors.
- **Infrastructure Constraints:** Aging roads, sewer, utilities, and broadband limitations increase costs and may deter investment in key locations (See **Exhibit 58** in the **Appendix** for a map of some of Medford's infrastructure resources).

Opportunities

External conditions Medford can leverage for economic growth.

- **Downtown Redevelopment and Placemaking:** Incentivize catalytic mixed-use projects and expand housing to build a vibrant urban core.
- **Medical and Health Education Expansion:** Attract residency programs, nursing schools, and even a potential medical school to retain talent.
- **Conference and Cultural Facilities:** A mid-sized conference center or performance venue could anchor tourism and business events.
- **Tourism Diversification:** Strengthen Medford's role in sports tourism, agri-tourism, wine tourism, and recreation to become a stand-alone destination.
- **Higher Education and Workforce Partnerships:** Align with SOU, RCC, and industry leaders to enhance training and upskilling pathways.
- **Regional Visioning and Coordination:** Medford can engage in Greater Regional Collaboration within the Rogue Valley and Southern Oregon through education, events, and organizational participation.
- **Place Branding and Asset Activation:** Develop branding which highlights Medford's economic role, natural beauty, and unique amenities in the Rogue Valley to attract visitors, talent, and investment and enhance civic pride.
- **Investing in Infrastructure:** Some targeted infrastructure improvements, including potential public transit expansions, placemaking efforts, or broadband could help Medford attract additional investment and economic growth.
- **Tech Sector Positioning:** Bridge Silicon Valley and the Silicon Forest through remote work hubs, coworking spaces, and tech ecosystem support.

Threats

External risks that could disrupt economic progress.

- **Over-Reliance on Low-Wage Sectors:** A services-heavy economy limits wage growth and upward mobility, increasing risk in downturns.
- **Climate Change and Wildfire Risk:** Regional climate events threaten health, housing, tourism, and agriculture.
- **State Policy and Regulatory Barriers:** Oregon's complex land use laws and tax structure deter some private investment.
- **Public Perception and Outmigration:** High housing costs, weak job pipelines, and limited cultural amenities may cause talent loss, especially among young adults.
- **Infrastructure and Mobility Gaps:** Bottlenecks in I-5 access, airport congestion, and unattractive corridors limit growth and investor interest.
- **Potential Loss of Anchor Employers:** Corporate relocations or closures (e.g., Lithia, Harry & David) would deeply impact the local economy and civic leadership.
- **Loss of Federal Funding:** Reduced federal support for affordable housing, transit, and education could slow local progress and strain city resources.
- **In-Migration Pressure:** An influx of new residents from larger metro areas could exacerbate housing affordability issues and increase displacement risk for long-term locals.

Strategic Themes

1. Downtown as an Anchor of Economic Identity

Downtown Medford is widely seen as a barometer of the city's overall economic health and a top priority for future investment. Visioning for the future paints the downtown as a vibrant, walkable area which includes housing, retail, entertainment, and civic spaces. There is strong support for activating ground-floor spaces, defining a clear downtown core, and pursuing partnerships for redevelopment — including city-owned lots and underutilized parcels. Strategies to investing in Medford's downtown range from enhancing existing attractions to developing a new downtown anchor such as a stadium or conference center. Steps towards improving public perception of the downtown, including beautifying downtown, updating tree wells, marketing businesses in the downtown, and investing in public safety measures, can work towards restoring civic pride, supporting local businesses, and driving reinvestment in the downtown.

2. Addressing Workforce Gaps and Talent Retention

Workforce development remains a priority across Medford's key sectors, such as healthcare and skilled trades, with employers facing difficulty hiring and retaining skilled talent. Current efforts emphasize expanding local training pipelines such as expanding nursing programs at SOU and RCC and supporting residency and internship opportunities that help new professionals stay in Medford. There is increasing interest in supporting emerging tech and traded-sector entrepreneurs, though barriers around talent visibility and ecosystem development remain. Broader community factors such as housing affordability, access to childcare, and a vibrant cultural life are seen as critical to retaining talent and attracting new residents.

3. Tapping into Medford's Gateway Potential

Medford is geographically positioned as a hub for travel and recreation, yet lacks physical landmarks, arrival experiences, and corridor amenities that make up a memorable gateway destination. Improving arrival experiences and reinforcing Medford's visual identity through strategies such as defining key entry points, improving aesthetics along major corridors, and enhancing the visibility of unique local assets like Bear Creek, local wineries, and regional sports venues can work to create a distinct identity and encourage regional and pass-through travelers to stop and engage. In addition, enhancing wayfinding, visual identity, and destination branding are seen as opportunities to make Medford more visible and memorable.

4. Building Toward a Unified and Forward-Looking Economic Vision

A cohesive economic vision can help unite the city's efforts and elevate its identity and role within the region. While coordination and partnerships are already underway, Medford's many assets and initiatives could be more powerful if connected under one narrative. A bold, unifying message can help align partners and reinforce collaboration, attract and guide investment, reinforce collaboration, help the city speak with one voice when pursuing major projects, and give residents and businesses a stronger sense of

shared direction for Medford's future. The vision should clearly articulate what Medford wants to be known for — whether as a health and sports hub, a family-friendly city, a dynamic place that is "open for business", or a center for employment, health care, and tourism.

5. Responding to Housing and Affordability Challenges

Access to affordable and middle-income housing is consistently identified as a core economic constraint in Medford today. Many see housing affordability as foundational to achieving any other economic goal in Medford, connecting housing access to school enrollment, business recruitment, and the vitality of Medford's downtown and neighborhoods. Expanding affordable and middle-income housing options helps Medford to support families, attract and retain talent, and support economic growth. Strategies such as reorienting buildings toward Bear Creek, leveraging public land, and encouraging higher-density projects, especially in or near downtown, are seen as ways to both address housing needs and improve urban vitality.

6. Advancing Health and Recreation as Economic Strengths

Medford has a competitive advantage in both the health and sports sectors, and expanding those strengths is a key opportunity for Medford's economic future. Ongoing investments in medical education and practitioner training can build upon existing major providers and a growing demand for practitioners, specialists, and allied health professionals in Medford, working to keep skilled professionals rooted in the region. At the same time, local sports tourism infrastructure — including Lithia & Driveway Fields and Rogue X — continues to attract regional events and visitors, generating economic activity. Strategies to increase Medford's appeal as both a wellness and recreation destination, may include enhancing hotels (such as attracting destination-quality hotels), as well as food services, and other amenities which extend visitor stays.

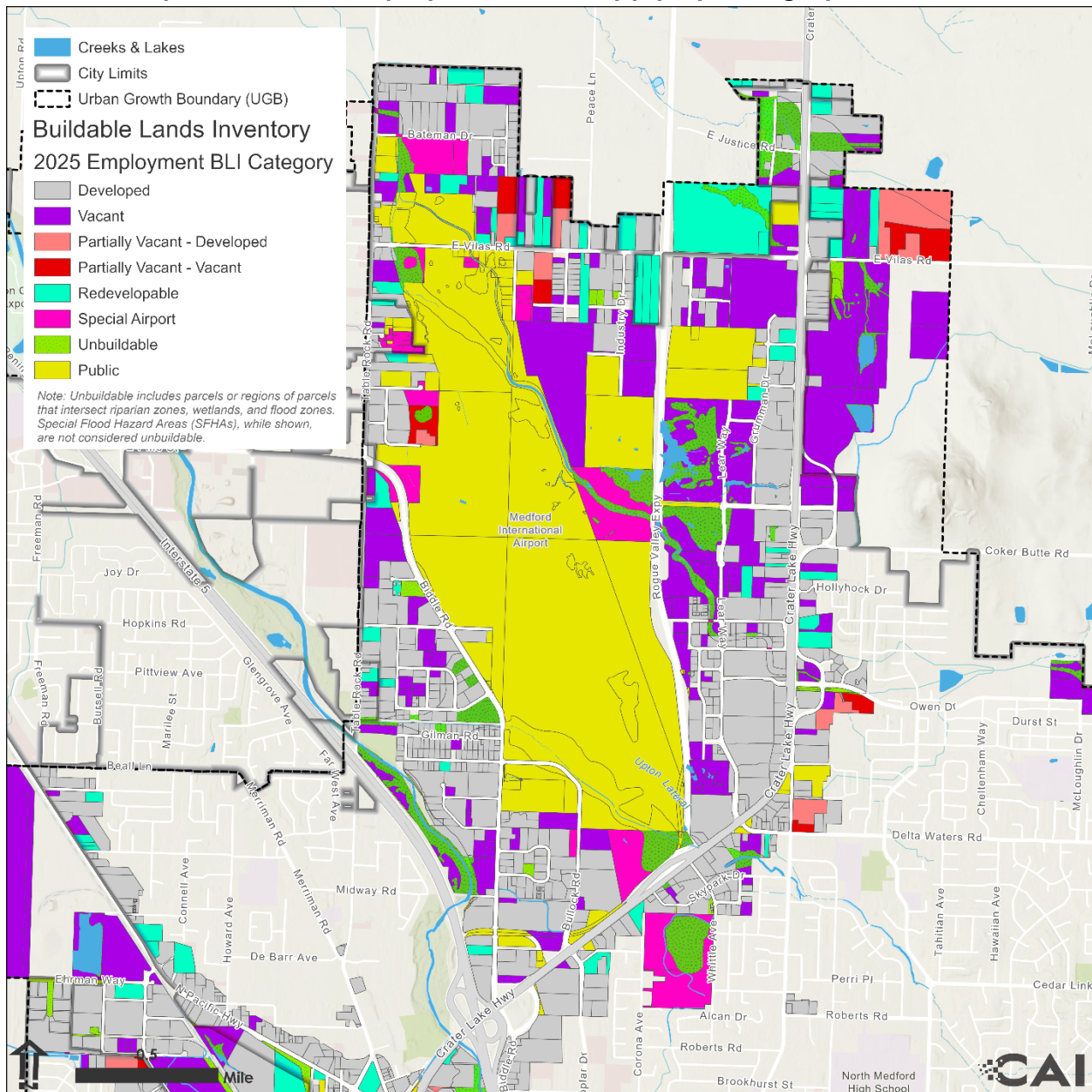
7. Removing Barriers and Unlocking Development Potential

While Medford is generally viewed as business-friendly and open to growth, developers and stakeholders continue to encounter obstacles related to aging infrastructure, regulatory complexity, and site readiness. Increasing the supply and suitability of the city's competitive short-term supply of employment land available is an important way to support future economic growth. While the state recommends the City adopt a goal for the short-term land supply to be 25% of total buildable supply, Medford may opt to adopt a lesser target if it deems that the current short-term land supply shown in this EOA (see the **Employment Land Supply** section of this report) is adequate to fulfill its vision for economic development in the near term. Infrastructure limitations such as stormwater, sewer, or mobility issues can add hidden costs or delay infill projects, particularly in older areas such as downtown. At the same time, lack of clarity in permitting processes, inconsistent messaging to investors, and the absence of coordinated site marketing tools can frustrate otherwise interested parties. By proactively addressing these physical and regulatory barriers, Medford can position itself as a city that not only welcomes investment but accelerates it. Strategic focus

areas include upgrading infrastructure in key opportunity areas, improvements in wayfinding and parking visibility in downtown, and clarifying the city's regulatory path for priority uses.

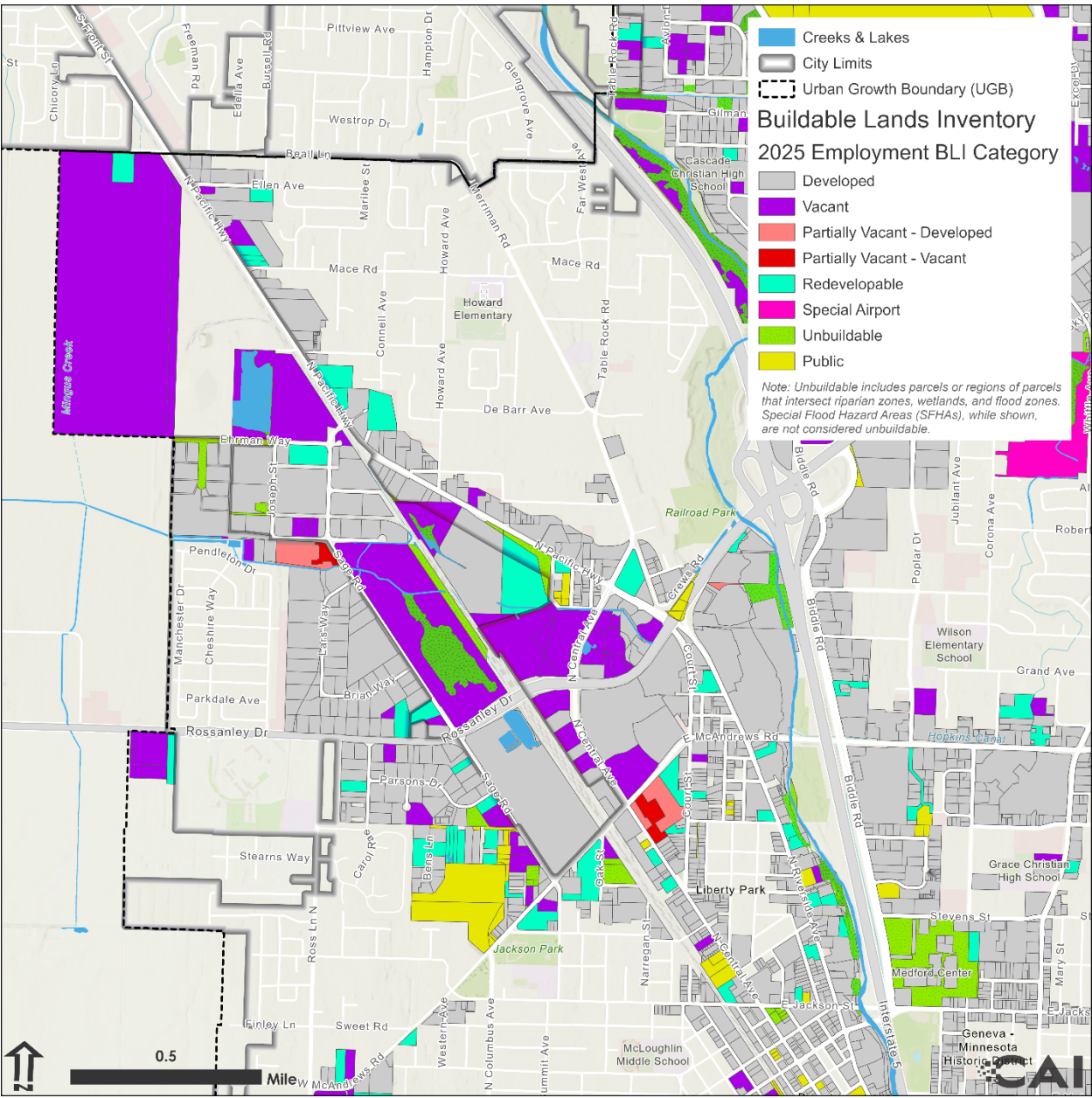
APPENDIX

Exhibit 54. Map of Buildable Employment Land Supply by Category, North Medford, 2025



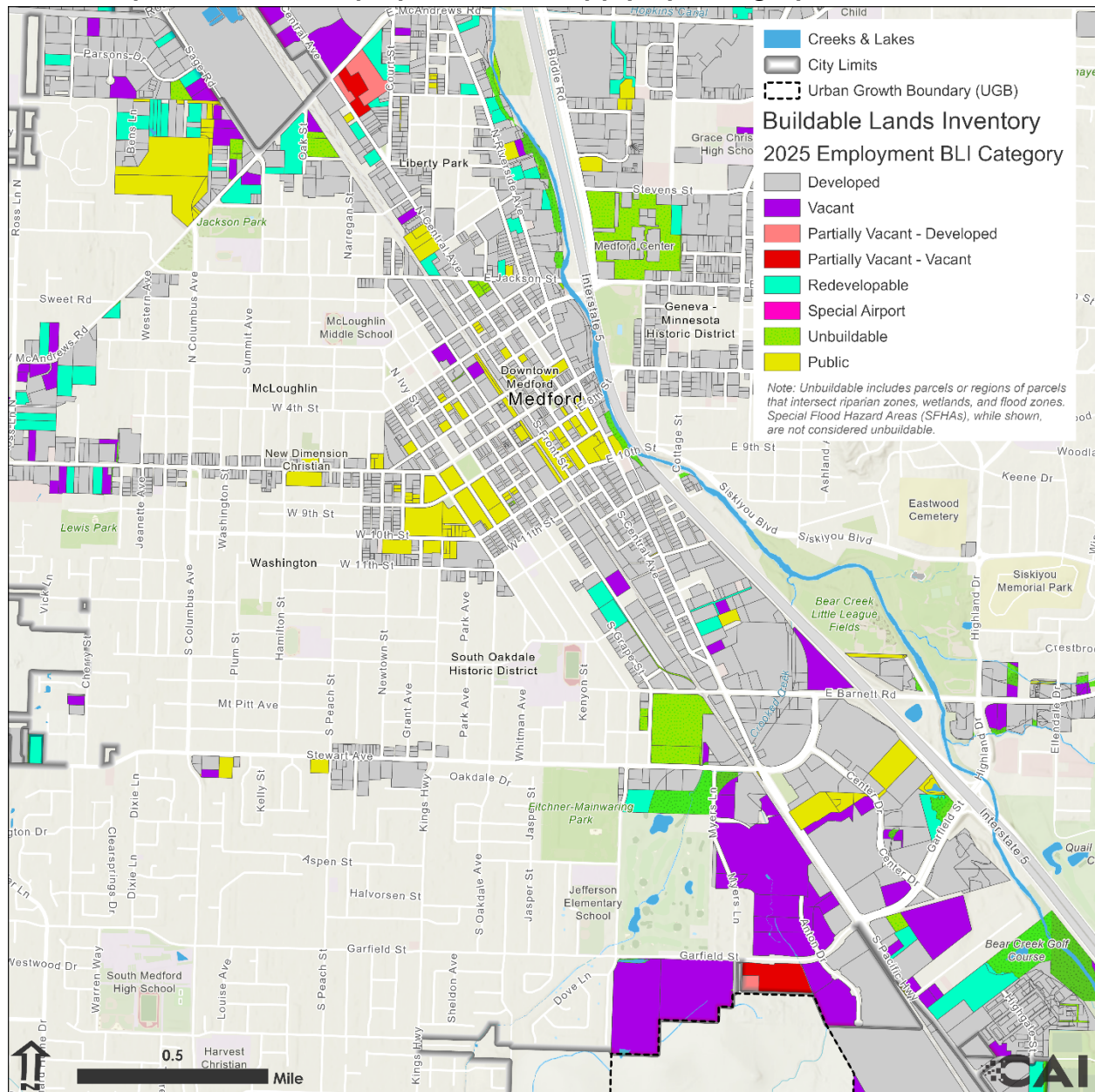
Sources: City of Medford, 2025; Jackson County Assessor, 2024; Oregon Employment Department, 2024; CAI, 2025.

Exhibit 55. Map of Buildable Employment Land Supply by Category, Northwest Medford, 2025



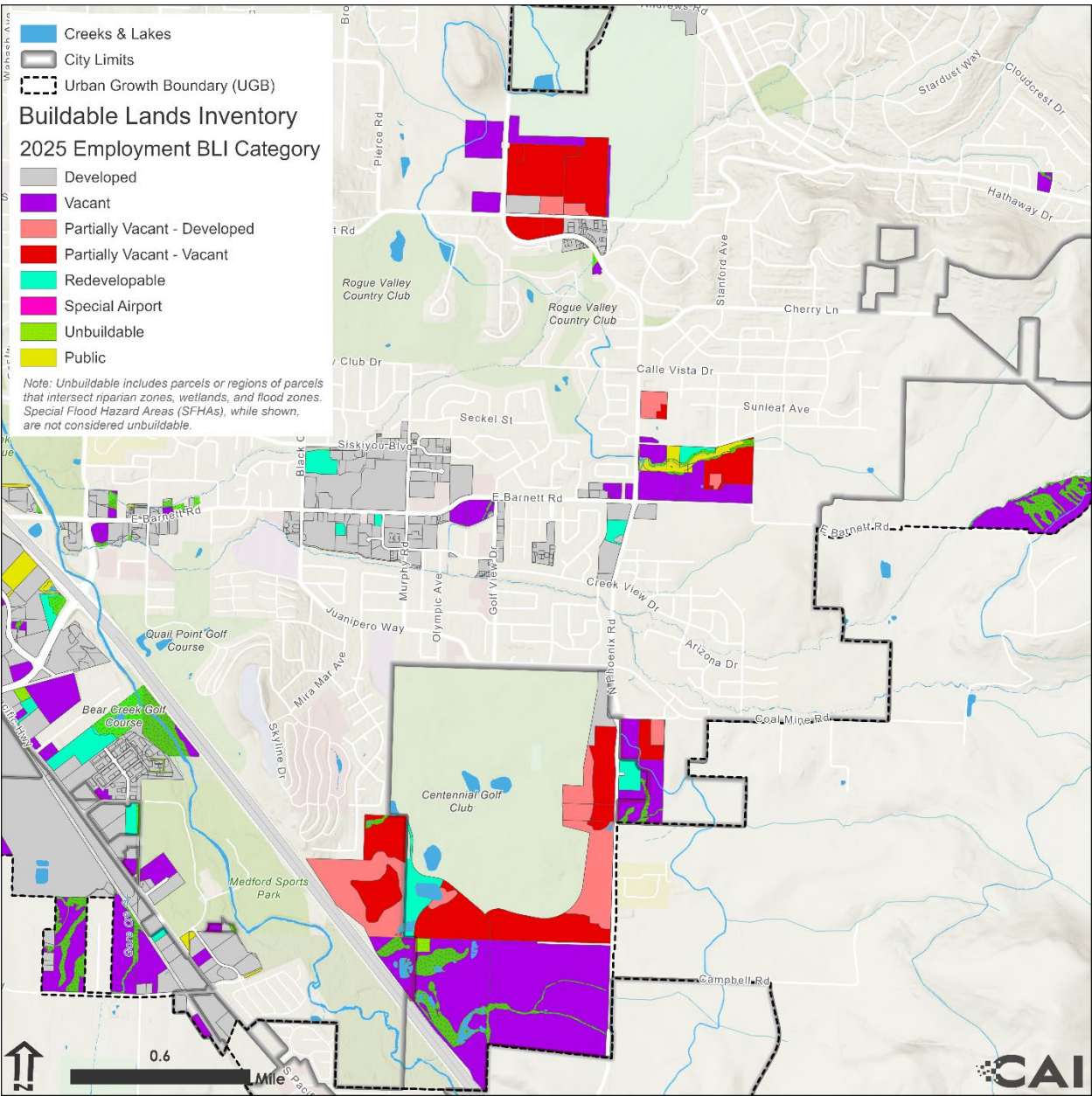
Sources: City of Medford, 2025; Jackson County Assessor, 2024; Oregon Employment Department, 2024; CAI, 2025.

Exhibit 56. Map of Buildable Employment Land Supply by Category, Downtown Medford, 2025



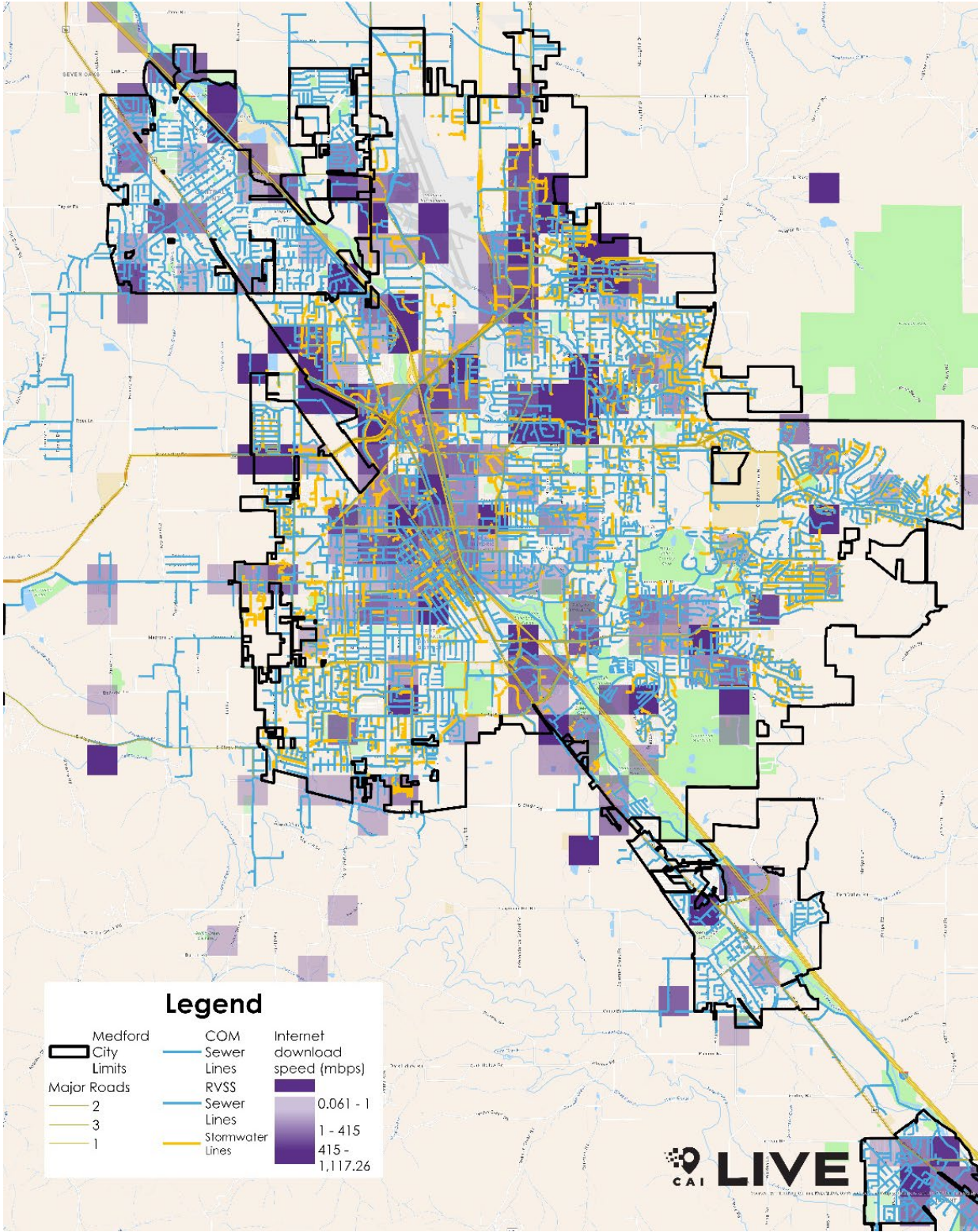
Sources: City of Medford, 2025; Jackson County Assessor, 2024; Oregon Employment Department, 2024; CAI, 2025.

Exhibit 57. Map of Buildable Employment Land Supply by Category, South Medford, 2025



Sources: City of Medford, 2025; Jackson County Assessor, 2024; Oregon Employment Department, 2024; CAI, 2025.

Exhibit 58. Infrastructure Resources Map, including Roads, Stormwater and Sewer Lines and Internet Speed, Medford, 2025



Sources: City of Medford, 2025; Jackson County Assessor, 2024; Ookla Speed Test, 2025; CAI, 2025.

Goal 1: Build a Diversified, Inclusive, and Future-Ready Economy

Grow a local and regional economy that serves all residents, building on existing strengths and developing new ones.

Context: Medford's has existing economic concentrations in medical services, retail, and accommodation and food services, as well as opportunities to strengthen potential clusters in regional nature-oriented tourism and sports and recreation that together constitute foundations to build on. In addition to serving local needs, the City also has opportunities to serve travelers passing through or visiting other areas in the region. At the same time, wildfire smoke, extreme weather, and other climate-related threats pose both direct and indirect risks to the local economy, making it important to build in resilience but also presenting opportunities to develop local capabilities.

Strategies:

- Strategy 1-1: Build on present strengths and support business expansion by understanding and responding to the needs of current businesses in the city.
- Strategy 1-2: Develop incentives and targeted outreach to attract well-paying jobs and skilled workers in tech, professional services, and clean manufacturing, leveraging existing strengths as well as the amenities and assets that draw people to the region.
- Strategy 1-3: Support experimentation and entrepreneurship.
- Strategy 1-4: Grow Medford's tourism and sports economy through strategic investments in hospitality, sports facilities, conference space, and events, emphasizing outdoor recreation and family-friendly amenities.
- Strategy 1-5: Seek out opportunities for new or existing businesses to address climate- or weather-related challenges facing the city and region.

Goal 2: Establish Medford as a Destination and a Place to Call Home

Plant and nurture a popular image of Medford that will attract new residents and employers as well as visitors, and that will give residents reasons to stay and visitors reasons to return.

Context: Medford faces challenges in attracting and retaining residents, employers, and visitors. The City's existing strengths in medical services and its outdoors- and activity-oriented culture can serve as two parts of a core from which to address these, while additional elements can be added to help people understand what the City offers and how they can contribute to it. Nurturing these among residents and raising awareness among potential visitors can involve both virtual and tangible elements, from social media to

coordinated signage and physical gateways that will draw travelers passing through or visiting other regional destinations into the city.

- Strategy 2-1: Establish a shared vision and a bold, cohesive brand that reflects Medford's values, assets, and aspirations, and communicate it through coordinated storytelling, gateway improvements, and investor engagement.
- Strategy 2-2: Capitalize on underleveraged assets and Medford's gateway location to regional attractions to generate activity and attract visitors.
- Strategy 2-3: Establish and work to realize a focused number of physical elements, including an active and revitalized downtown and one or two visitor attractions such as a sports stadium or conference center, that can serve as physical linchpins for that vision and differentiate Medford from other cities in the region.
- Strategy 2-4: Ensure that those core elements work together, and that they build on rather than displacing or supplanting existing valuable assets.
- Strategy 2-5: Create systems to assess and track progress over time.

Goal 3: Address Systemic Issues That Could Hinder Long-term Success

Ensure that fundamental needs of both citizens and business such as housing availability, transportation, and workforce development are understood and addressed, to address concerns or take away people's reasons *not* to come to – or remain in – Medford.

Context: Its positive qualities notwithstanding, the City has experienced challenges in both attracting companies and residents and retaining them over time. While some of these may stem from a lack of awareness or understanding, others such as housing availability and affordability and workforce sufficiency, have complex causes and will require coordinated and sustained efforts to address.

- Strategy 3-1: Address housing supply and affordability challenges by encouraging a range of housing types to support current and future residents and employers.
- Strategy 3-2: Partner with regional education institutions and employers to expand healthcare and tech workforce training programs, improve educational attainment, and retain young professionals.
- Strategy 3-3: Establish systems to ensure that emergent or potential challenges are identified early and appropriate strategies are developed to address them.

Goal 4: Activate and Revitalize Downtown as a Mixed-Use Activity Hub

To create a vibrant, walkable downtown anchored by housing, retail, services, and cultural venues, to make the area a vibrant destination attractive to residents, visitors, and businesses, support round-the-clock economic activity, and enhance civic identity.

Context: Medford's downtown enjoys attractive cultural assets in its theaters and museums, but has opportunities to improve in the utilization of buildings and parking areas, to address perceived issues of safety and homelessness, and to give people more reason to visit and spend time there. Opportunities exist to address these via creative action and partnerships.

Strategies:

- Strategy 4-1: Build public support for creation of a vibrant downtown:
 - Implementation Policy 4-1: The City will engage with residents and businesses to **build a collective vision** of the range of elements that could include, thinking broadly about what constitute assets and creatively about ways to turn challenges into opportunities.
- Strategy 4-2: Give people more reasons to visit and spend more time in downtown, through unique local shopping and dining opportunities, attractive public spaces, and compelling activities and attractions.
 - Policy 4-2: The City will encourage the presence of **unique local shopping, dining, and family-friendly entertainment** options, and explore potential models of support for temporary installations or long-term development.
 - Policy 4-3: The City will support a regular program of **cultural and family-oriented events** that will attract residents and visitors to the area, for example through small concerts, performances, art installations, pop-up dining events, and the like, taking the lead, partnering with, or supporting private, non-profit, or other community organizations as appropriate.
- Strategy 4-3: Make it easier for entrepreneurs and businesses to experiment, establish, and flourish in downtown by ensuring a supply of suitable land and encouraging the development of a critical mass of activities.
 - Policy 4-4: The City will **define focal areas** where targeted investments can help build critical mass, considering existing businesses and attractions, accessibility for both pedestrians and drivers, and potential or underutilized amenities that could help draw people and encourage them to linger.

- Policy 4-5: The City will **identify specific buildings and spaces** that could be redeveloped, repurposed, or adapted for new uses, and will explore possible regulatory or approval measures that could **make it easier to bring new and startup businesses into Downtown** through pop-up stores, mobile dining, or other flexible usage models as well as permanent establishments.
- Strategy 4-4: Encourage development of a mix of uses, including more-dense residential, that will increase occupancy and activity downtown across more times of the day and night.
 - Policy 4-7: The City will monitor and adjust land use policies to **protect the supply of commercial land** in downtown, while **facilitating supportive uses** such as child care facilities or shared parking areas that serve downtown workers, and **allowing for experimentation** through pop-up stores, mobile dining, or other flexible usage models.
 - Policy 4-8: Establish minimum residential density levels and design standards that **encourage mixed-use and more-dense residential buildings downtown**, and allow for a variety of housing models that can improve affordability.
- Strategy 4-5: Make it easy, safe, and enticing for people from surrounding areas or travelers passing through the area to visit downtown.
 - Policy 4-9: The City will invest in infrastructure and other improvements that **enable safe and convenient access to and within downtown**, such as pedestrian and cycling paths, seating, lighting, signage, parking, and accessible restroom facilities.
 - Policy 4-10: The City will **coordinate downtown mobility improvements with Gateway strategies** to attract people traveling on I-5.
- Strategy 4-6: Establish mechanisms to ensure ongoing maintenance of public and private spaces, recognizing both are important for attracting visitors and residents.
 - Policy 4-11: The City will explore and identify **potential local, state, and federal funding sources and public-private financing models** which could support public space and streetscape improvement projects to improve the attractiveness of the area and attract greater visitation.

Goal 5: Build Systems and Habits for Thinking and Acting Big

Initiate a positive feedback loop, building self-confidence and ‘muscle memory’ amongst residents, businesses, and local leadership through tangible wins and snowballing progress.

Context: Medford is the de facto economic hub of southern Oregon, but the City may not possess the depth of self-confidence or the collective habits to fully own that role and the possibilities that come with it. The city enjoys numerous assets, but also faces complex challenges that will require big-picture thinking and coordinated, multi-prong strategies to address. Opportunities exist to create a flywheel effect where successes lead to more successes, but capitalizing on those will require the courage to begin as well as skills and systems to execute on details.

Strategies:

- Strategy 4-1: Lean into challenges, accepting that durable solutions to complex challenges require coordinated and sustained effort.
- Strategy 4-2: Invite and build on diverse perspectives.
- Strategy 4-3: Establish regular communication with neighboring cities, economic development organizations, and institutions to align priorities, share data, and identify opportunities for collaboration.
- Strategy 4-4: Work with relevant partners to drive investments in multimodal transportation and airport capacity, and to ensure sufficient development-ready land to meet future demand and improve quality of life for residents and investors.