

City of Ashland

Economic Opportunity Analysis

June 2, 2025

Prepared by:



Prepared for:





*Community Attributes Inc. tells data-rich stories about communities
that are important to decision makers.*

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Land Use and Climate

- Commercial land comprises about 4% of Ashland’s land area, industrial land 1%, and employment-zoned land about 8%, with overlays and regulations limiting some development potential.
- The city faces multiple climate risks—wildfire, drought, and extreme heat were all rated as high-probability, high-vulnerability hazards in the 2024 hazard mitigation plan.

National and Regional Economic Trends

Macroeconomic Indicators

- National unemployment fell to 4.1% in 2024, returning to pre-pandemic lows, while labor force participation rebounded to 62.6%—still below early 2000s levels.
- Inflation rose sharply after 2020, with the Consumer Price Index (CPI) increasing 15% between 2020 and 2022; as of late 2024, CPI remained elevated at 175 (base 1999 = 100).
- The Federal Reserve’s policy response led to a sharp increase in the Secured Overnight Financing Rate (SOFR), which peaked at 5.31% in 2023 before easing slightly to 4.8% in 2024.

Southern Oregon and the Rogue River Valley

- Oregon’s overall population growth has been steady, but Jackson and Josephine Counties ranked mid-range among counties, with Medford growing faster than Ashland post-2020.
- The regional economy is service-oriented, with Services, Retail Trade, and Education and Health each accounting for about 21–24% of private jobs in the Jackson-Josephine region as of 2021. Private employment does not include public jobs like government or public school positions
- Since 2010, Jackson County added over 14,000 private jobs, growing at a CAGR of 1.5%, with the fastest growth in Construction (+5.4% CAGR), Education (+4.1%), and Resources (+4.0%). Private employment does not include public jobs like government or public school positions
- In Ashland, the share of total workers who report working from home grew from 13.3% in 2010 to 21.1% in 2023, maintaining a higher rate than Medford or the region.
- High-growth, specialized industries in Jackson County include Sporting Goods (LQ >10), Healthcare Services, and Food and Beverage establishments, with strong local employment and growth.

OVERVIEW OF EXISTING CONDITIONS IN ASHLAND

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

Geographic Setting

Ashland is located in the Rogue Valley of Southwestern Oregon. With approximately 21,600 residents, Ashland is the second largest city in Jackson County, behind Medford. Ashland is adjacent to Interstate-5, with other communities in the region including Medford, Phoenix, Talent, Central Point, and Grants Pass. Ashland is known regionally as a tourism hub—home to the Oregon Shakespeare Festival and an array of cultural, recreational, and culinary attractions. The city serves as a gateway to the surrounding mountains, offering access to walking and biking trails, winter recreation, and 17 city parks, including the iconic Lithia Park. Covering 4,256 acres, Ashland's land use is predominantly residential, with a built environment characterized by single-family neighborhoods surrounding a compact, vibrant downtown that features specialty retail, fine dining, seasonal events, and Southern Oregon University.

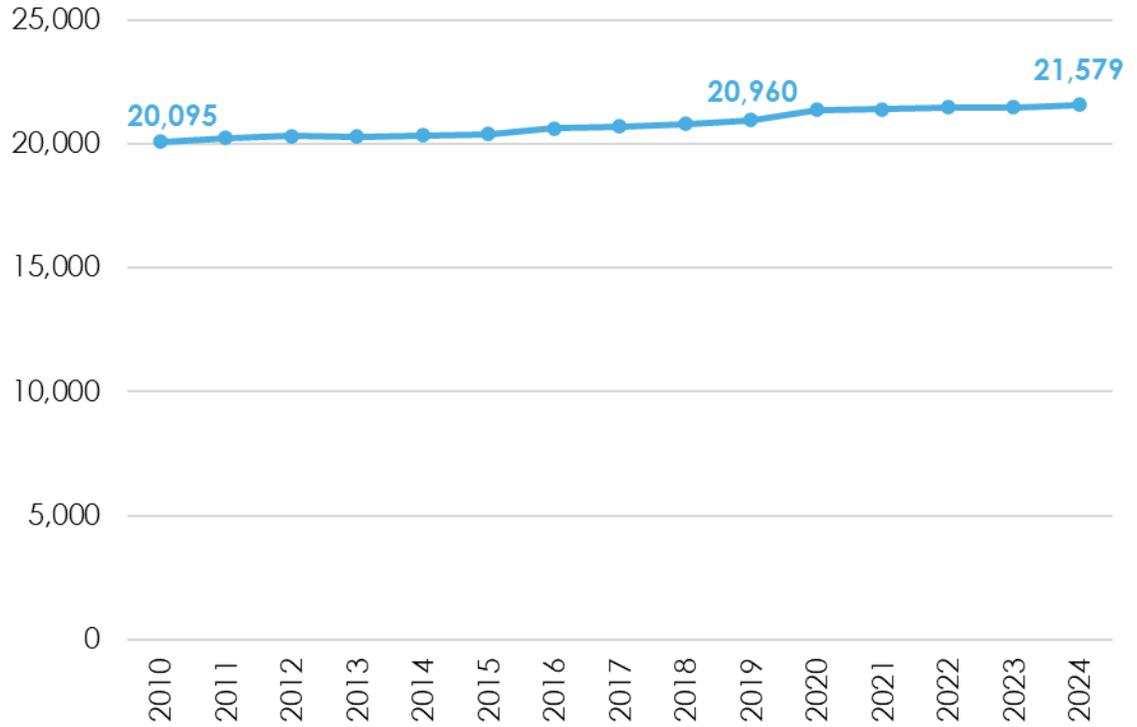
People and Housing

Community Demographics

Compared to the region and its nearby peers, Ashland's population tends to be older, more educated, and more racially homogenous. However, regional demographic shifts, seen in Jackson County, Medford and Ashland, include a growing population and a growing proportion of seniors. As of 2022, this aging trend is more pronounced in Ashland than in Medford, while Ashland population growth is less pronounced than Medford's.

According to the Population Research Center at Portland State University, Ashland's population grew from 20,095 in 2010 to 21,579 in 2024, reflecting a compound annual growth rate (CAGR) of 0.5% (**Exhibit 1**). Over the same timeframe, Medford saw a CAGR of 1.2%.

Exhibit 1. Historic Population, Ashland, 2010 – 2024

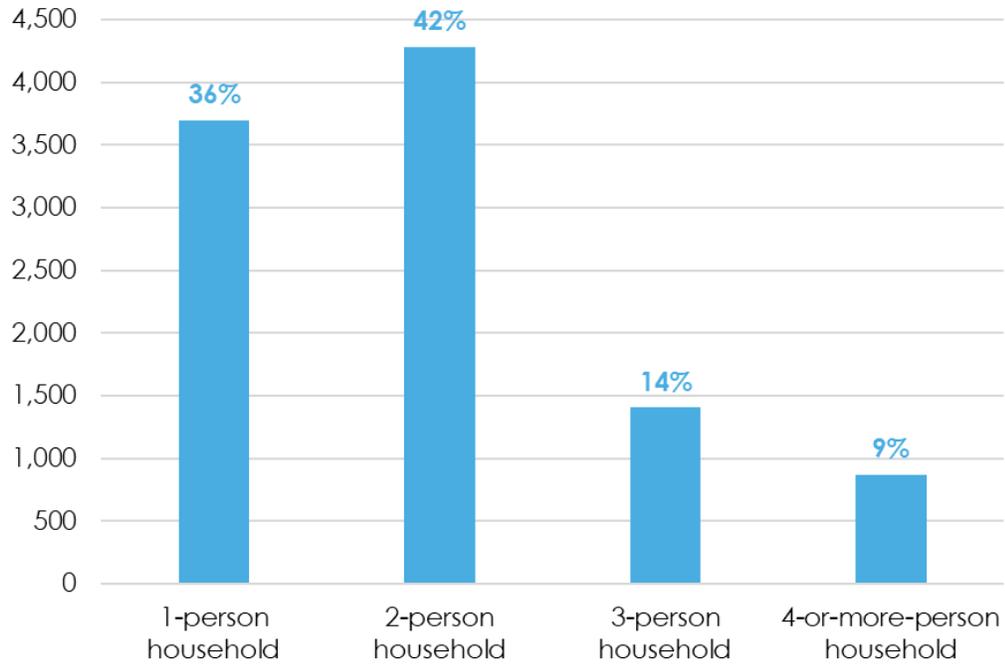


Sources: State of Oregon, Population Research Center at Portland State University, 2010-2023; CAI, 2025.

In 2022, Jackson County’s median age was 42 years old, while Medford’s was 39.5 and Ashland’s was 48.2. Ashland saw the 65+ population grow from 16% of the population in 2010 to almost 28% in 2022 (**Exhibit 2**). Over the same period, Ashland’s working-age population decreased by about 6% and the population 19 and under dropped by about 8%.

demand for smaller housing typologies which accommodate small households as opposed to larger structures.

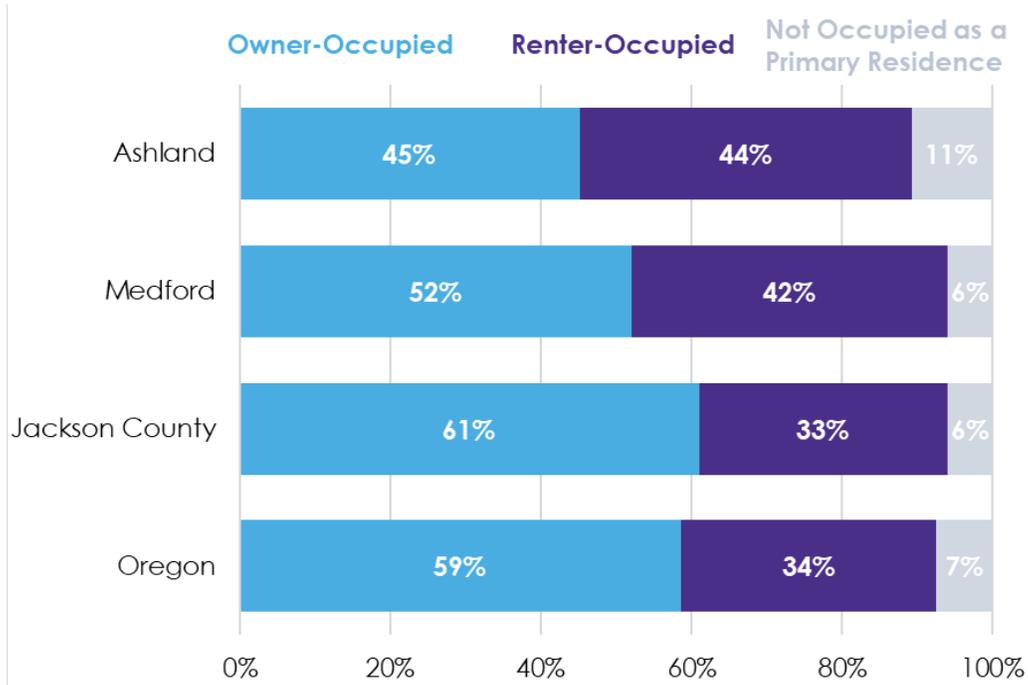
Exhibit 3. Households by Household Size, Ashland, 2023



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**). Ashland, however, shows a closer split between homeowners (45%) and renters (44%). The remaining 11% of units in Ashland are those which are not occupied as a primary residence, including second homes, short term rentals, or otherwise vacant properties. The higher proportion of units in Ashland which are not occupied as a primary residence, compared to other geographies, speaks to the impacts of short-term rentals and second homes in Ashland.

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



Sources: American Community Survey, 2023; CAI 2024.

The average household size for renters in Ashland was 2.22 people per household. For homeownership households, this value is higher at 2.56 people per household.

The size of housing units tends to be larger for owner-occupied housing units than for renter-occupied units (**Exhibit 5**). 75% of owner-occupied units in Jackson County have at least 3 bedrooms, compared to only 34% of renter-occupied housing units.

Exhibit 5. Housing Unit Size by Tenure, Jackson County, 2023

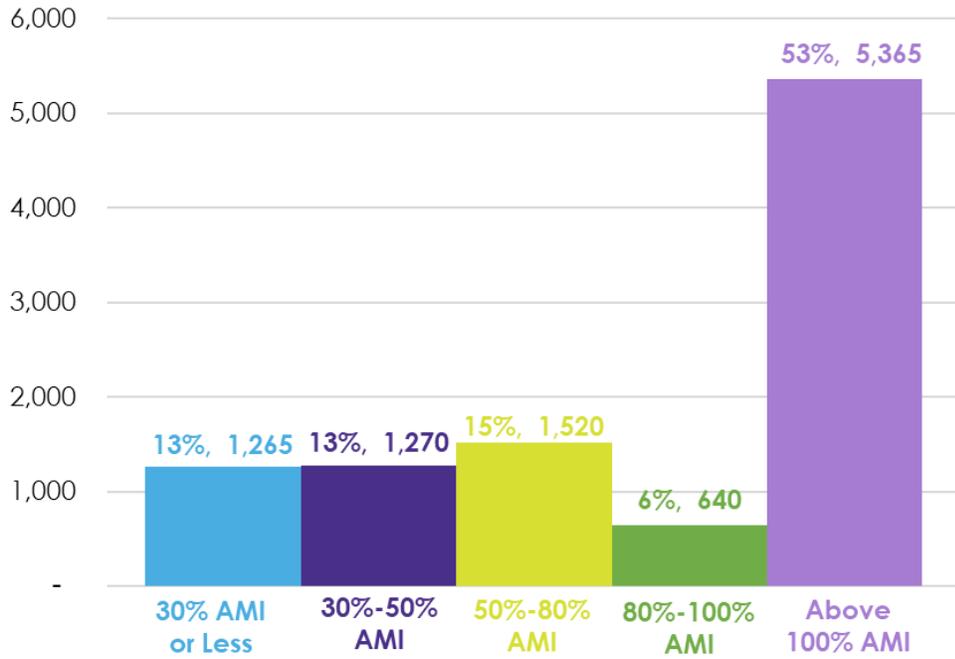


Sources: American Community Survey, 2023; CAI, 2025.

While Medford and Ashland’s median household income is lower than that of the county or the state, median household income increased at similar rates for all four areas from 2010-2023. The median annual household income in Ashland was \$71,800 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.

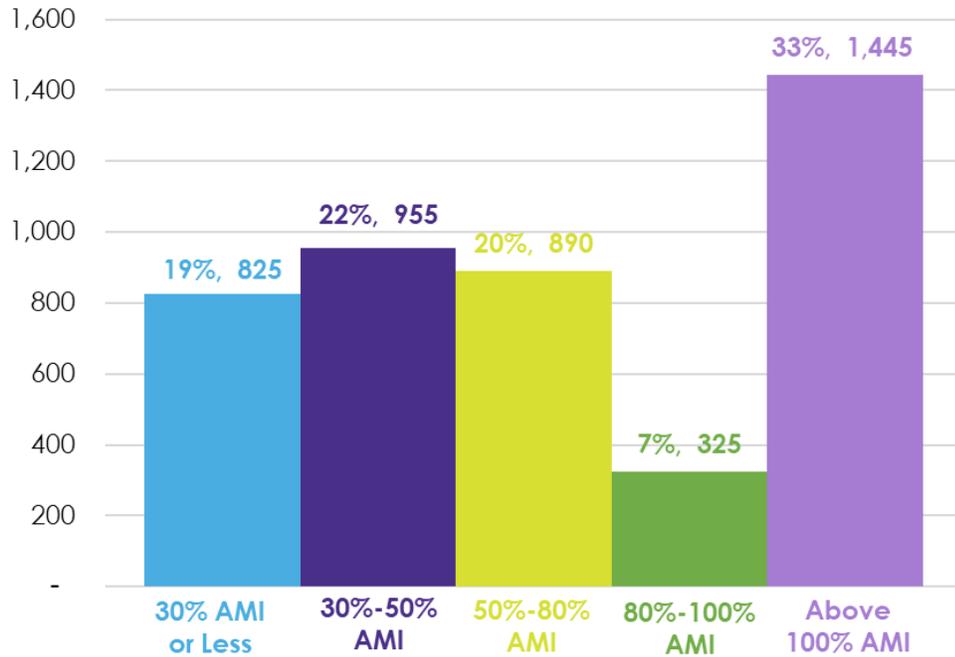
For HUD CHAS data, the term “affordable housing” means that a household spends no more than 30% of its gross income on housing costs. Housing costs include rent or mortgage payments plus utilities. The Area Median Income (AMI), a commonly accepted metric created by the US Department of Housing and Urban 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 6** shows the 2021 and 2025 income limits by household size in the Medford Metro Area, which includes Ashland and most of Jackson County. These metrics are used to understand the affordability of the existing housing stock in Ashland. For 1 person in Jackson County, the AMI for 2021 is \$51,150 while low income is designated as \$38,300 or less. By 2025, the median income for 1 person in Jackson County is \$64,700 while low income is designated as \$51,750 or less.

Exhibit 7. Total Households by Area Median Income, Ashland, 2021



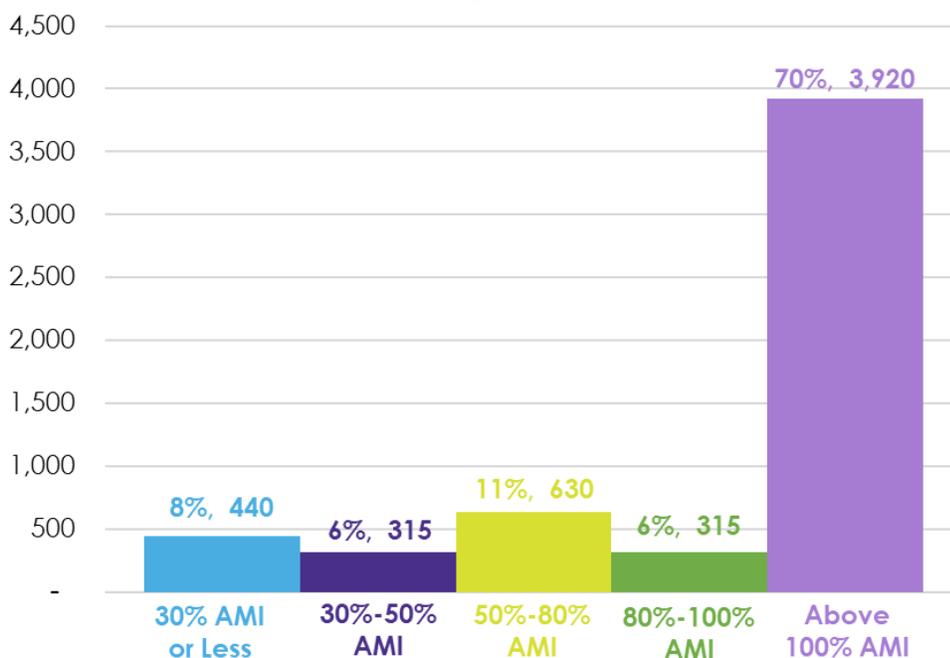
Source(s): CHAS 2017-2021; CAI 2025.

Exhibit 8. Renting Households by Area Median Income, Ashland, 2021



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

Exhibit 9. Homeowner Households by Area Median Income, Ashland, 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.

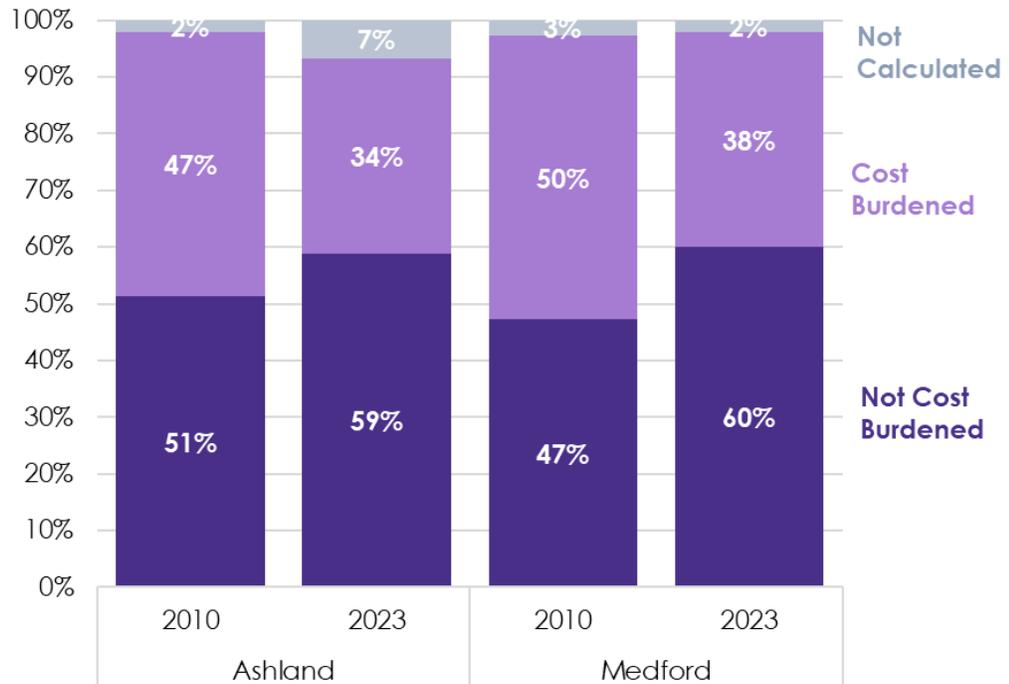
Since 2010, Oregon, Jackson County, Medford and Ashland have all seen household income increase while cost burden due to housing decreased. As of 2023, at least 34% of households in Ashland are experiencing cost burden due to housing (**Exhibit 10**). "Not calculated" means that the cost burden percentage could not be calculated for those housing units due to missing or unreliable income or housing cost data.² 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, 48% of renting households in Ashland experienced cost burden compared to 21% of households which own their home (**Exhibit 11**).³

² "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.

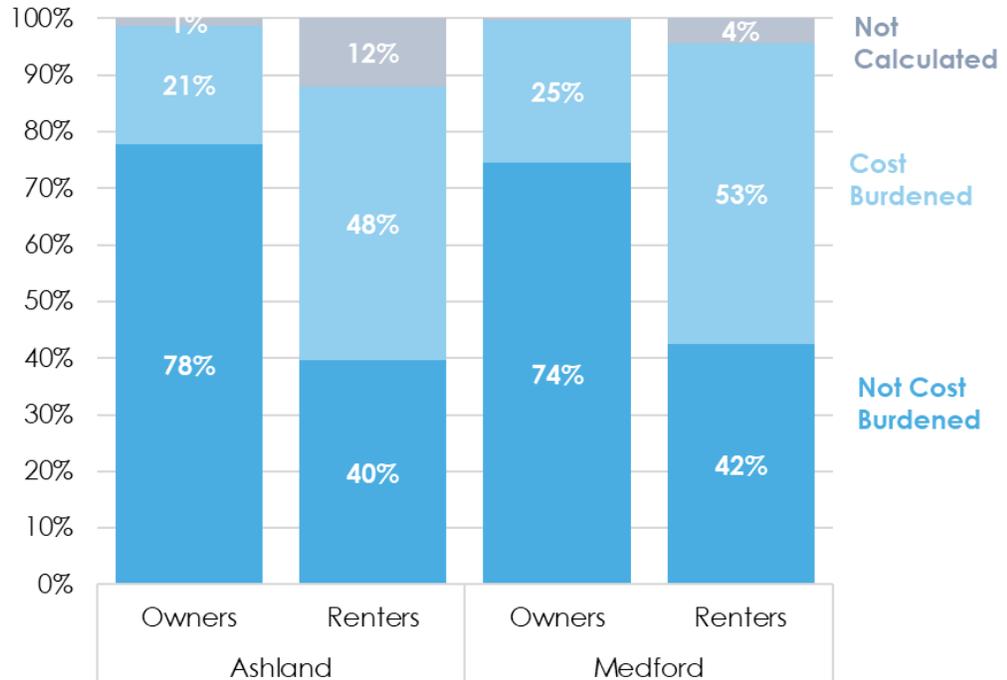
³ "Not computed" values are often higher among renters because: Income is more likely to be unreported, unstable, or very low, rent-free arrangements are more common, and housing and financial data may be less reliably reported

Exhibit 10. Housing Cost Burden, Ashland & Medford, 2010 & 2023



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

Exhibit 11. Housing Cost Burden by Tenure, Ashland & Medford, 2023



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

Housing in Ashland

Of Ashland's total housing stock (11,499 units in 2023), 10,264 or 89% are occupied. The remaining 1,235 units are classified as either vacant or partially vacant, which includes units for rent or sale that are not yet occupied at the time of the survey; units for seasonal, recreational, or occasional use (such as short-term rentals); and units intended for vacation or occasional use (such as second homes).

Single-family homes make up 59% of Ashland's total housing inventory (6,784 out of 11,499 units) (**Exhibit 12**). This is slightly lower than Oregon's proportion of single-family homes (62%). Multi-unit structures of five or more units make up approximately 17% of the housing stock.

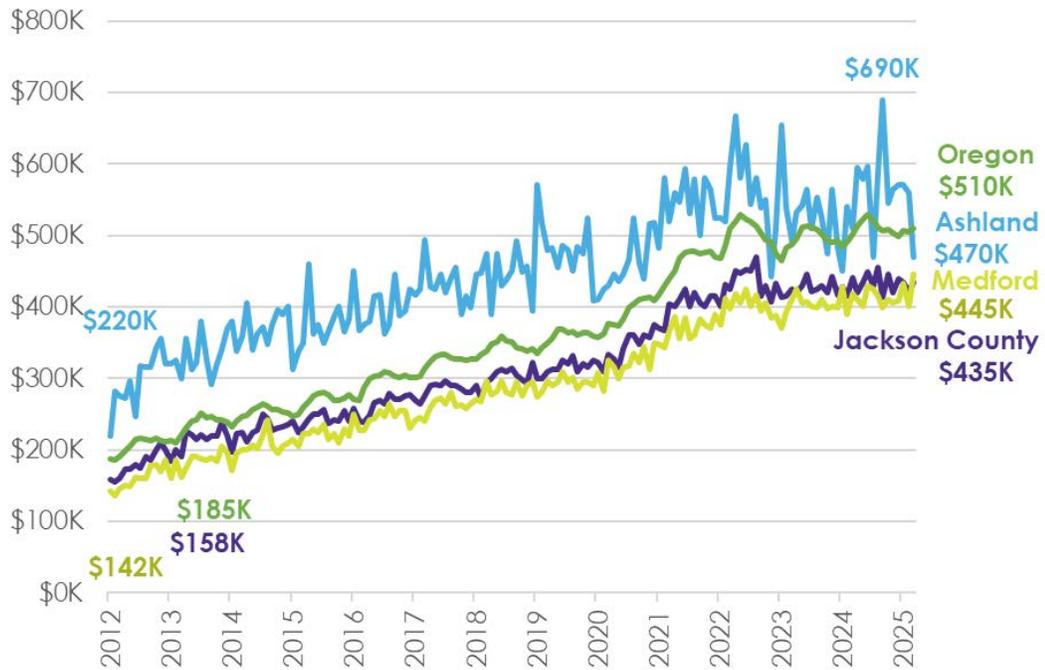
Exhibit 12. Housing Units by Structure Size, Ashland, 2023

Structure Size/Type	Count	% of Total
1 Detached Unit in Structure	6,784	59%
1 Attached Unit in Structure	1,521	13%
2 Units in Structure	499	4%
3 to 4 Units in Structure	706	6%
5 to 9 Units in Structure	545	5%
10 to 19 Units in Structure	309	3%
20 to 49 Units in Structure	443	4%
50 or More Units in Structure	516	4%
Mobile Homes	120	1%
Boat, RV, Van, Etc	56	0%
Total Units	11,499	

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

Median home sale prices have increased steadily in Medford, Ashland, Jackson County and Oregon since 2012 (**Exhibit 13**). Ashland's market, however, shows pronounced seasonal variation, with recurring peaks and troughs throughout the years. As of September 2024, Ashland reaches the highest median home sale price at approximately \$690,000. Outside of some low troughs occasionally appearing after 2022, Ashland's home prices have consistently exceeded the averages for Medford as well as regional and state averages. As of March 2025 (the most recent data collected), Ashland's median home price was \$470,000, compared to \$510,000 in Oregon, \$445,000 in Jackson County, and \$435,000 in Medford.

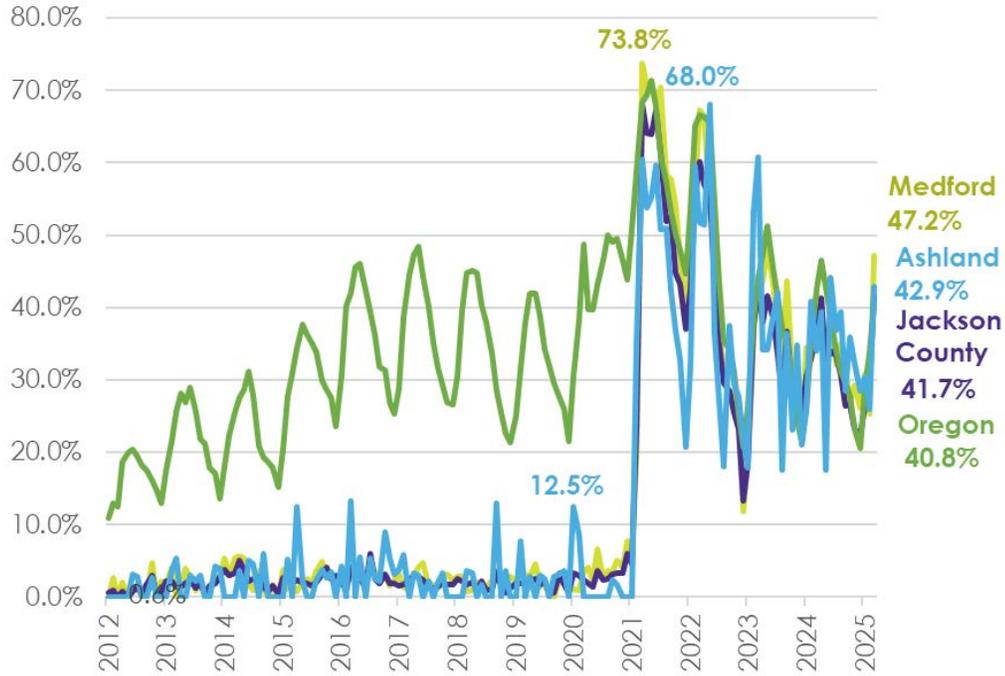
Exhibit 13. Median Home Sale Price, Ashland, Medford, Jackson County and Oregon, Jan 2012 – March 2025



Sources: Redfin, 2025; CAI, 2025.

The share of homes sold within two weeks of listing remained relatively low and stable across all areas from 2012 to 2020, when this indicator spiked sharply in all geographies, such that in Medford 74% of listings were removed within two weeks (**Exhibit 14**). Ashland’s peak was 68%, recorded in May of 2022. Since then, the rate of two-week sales has declined somewhat but remains elevated compared to pre-2020 levels. As of May 2024, this value was 18%. Most recent data (March of 2025), shows that 47% of all of Medford’s new listings and 43% of all of Ashland’s new listings were sold within two weeks.

Exhibit 14. Housing Units off the Market within Two Weeks of Listing, Ashland, Medford, Jackson County and Oregon, Jan 2012 – March 2025

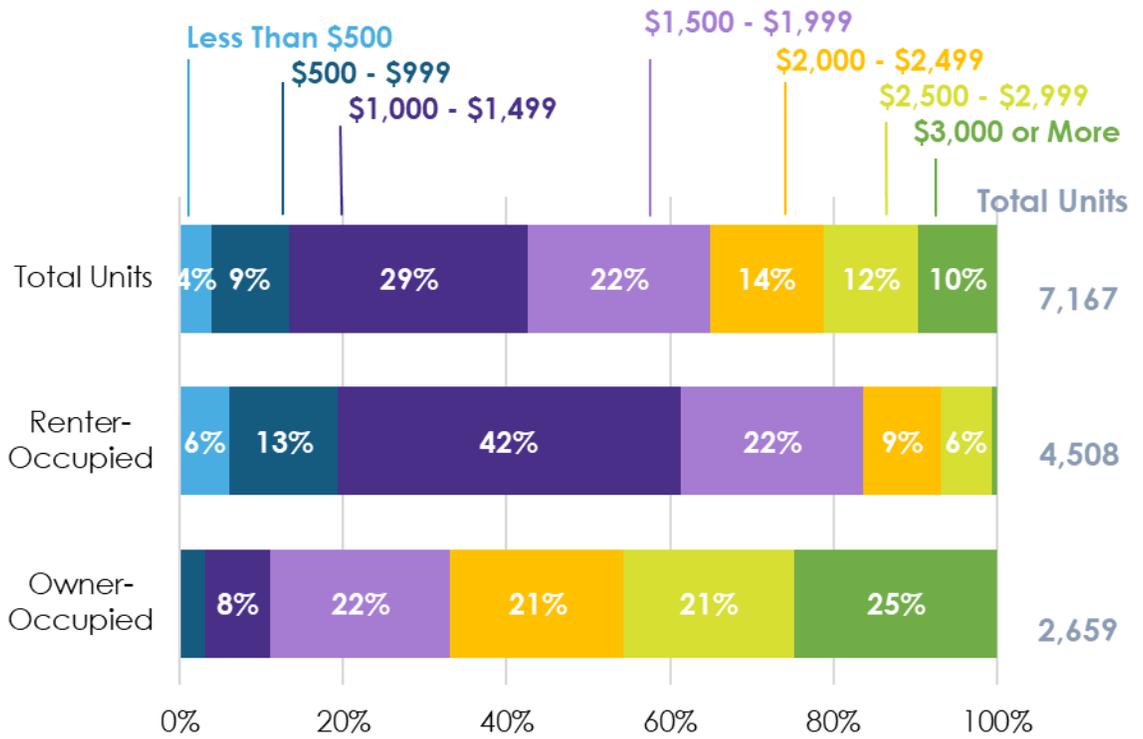


Sources: Redfin, 2025; CAI, 2025.

As of 2023, median housing costs per rental unit, including rent, utilities, or other costs, was \$1,367 per month, which is slightly lower than that of the state (\$1,450) (**Exhibit 15**). Housing costs for owner-occupied units however, were a median of \$2,398 monthly including mortgage, taxes, utilities, insurance, and HOA fees as applicable. This is over \$1,000 higher than the rental units and is slightly higher than the median monthly home cost for homeowners at the state level (\$2,080).

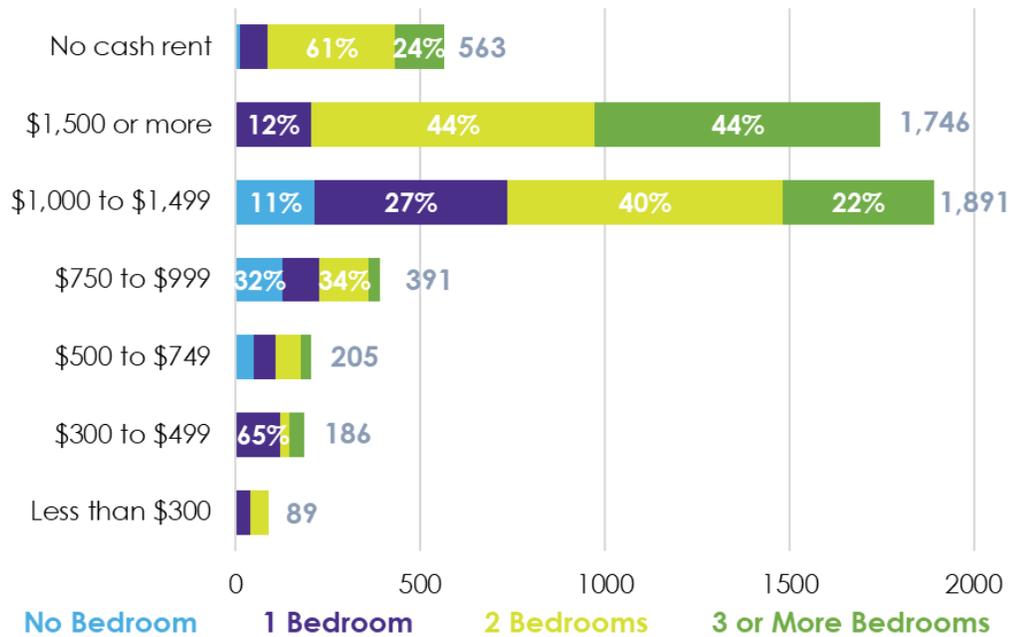
The majority of rental units in Ashland, at about 81%, cost more than \$1,000 a month (**Exhibit 16**). The largest grouping of rental units in Ashland (1,891) fall within the \$1,000 - \$1,500 rental range. Of these, most (62%) are large units with 2 or more bedrooms. The second largest range is housing units for \$1,500 or more in rent, with 1,746 units. 88% of these units have 2 or more bedrooms. A greater proportion of lower-cost rental units are also smaller in size. Among units with rents between \$300 and \$499, 65% are studios, or no bedroom units.

Exhibit 15. Monthly Housing Costs by Tenure, Ashland, 2023



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

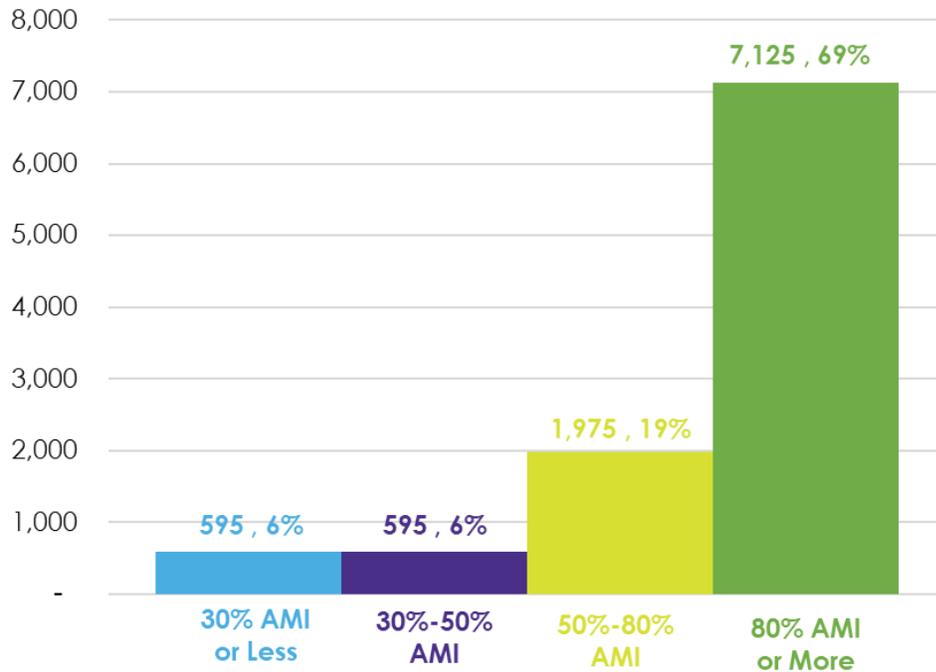
Exhibit 16. Housing Units by Rental Rate, Ashland



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

According to the U.S. Department of Housing and Urban Development’s CHAS data, housing units are categorized by the maximum rent or home price affordable to households earning 30%, 50%, and 80% of area median income (AMI).⁴ For HUD CHAS data, "affordable housing" means that a household spends no more than 30% of its gross income on housing costs. **Exhibit 17** shows the total number of housing units available at different income levels in Ashland. While 26% of Ashland’s households earn less than 50% AMI (**Exhibit 7**), only 12% of Ashland’s housing stock is affordable at that income level. Ashland has more housing units affordable at 50% - 80% AMI and 80% AMI and more than there are households that earn incomes at those levels.

Exhibit 17. Household Earnings Compared to Housing Affordability Levels, Ashland, 2021



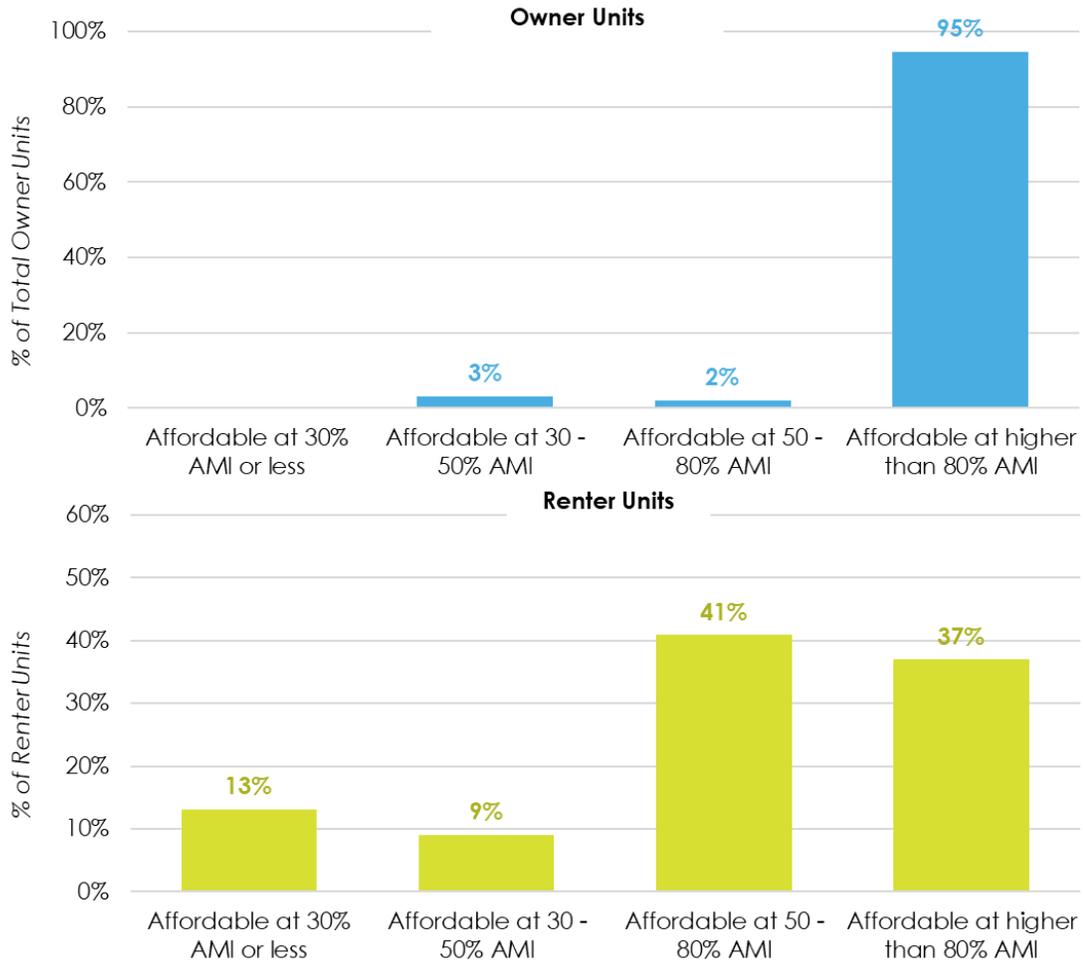
Source(s): CHAS 2017-2021; CAI 2025.

Exhibit 18 shows the availability of Ashland’s housing stock at various levels of affordability. 95% of owner-occupied housing in Ashland is only

⁴ HUD CHAS data dictionary is available online for viewing at: <https://view.officeapps.live.com/op/view.aspx?src=https%3A%2F%2Fwww.huduser.gov%2Fportal%2Fdatasets%2Fcp%2FCHAS%2F2007Data%2FDimensions.doc&wdOrigin=BROWSELINK>

available for households making 80% AMI or higher. Renter-occupied units, however, show some (13%) housing options affordable for households making less than 30% AMI, another 9% of units available at the 30%-50% AMI range, and 41% of units available at 50% - 80% AMI.

Exhibit 18. Housing Units by Tenure and Affordability Level, Ashland, 2021

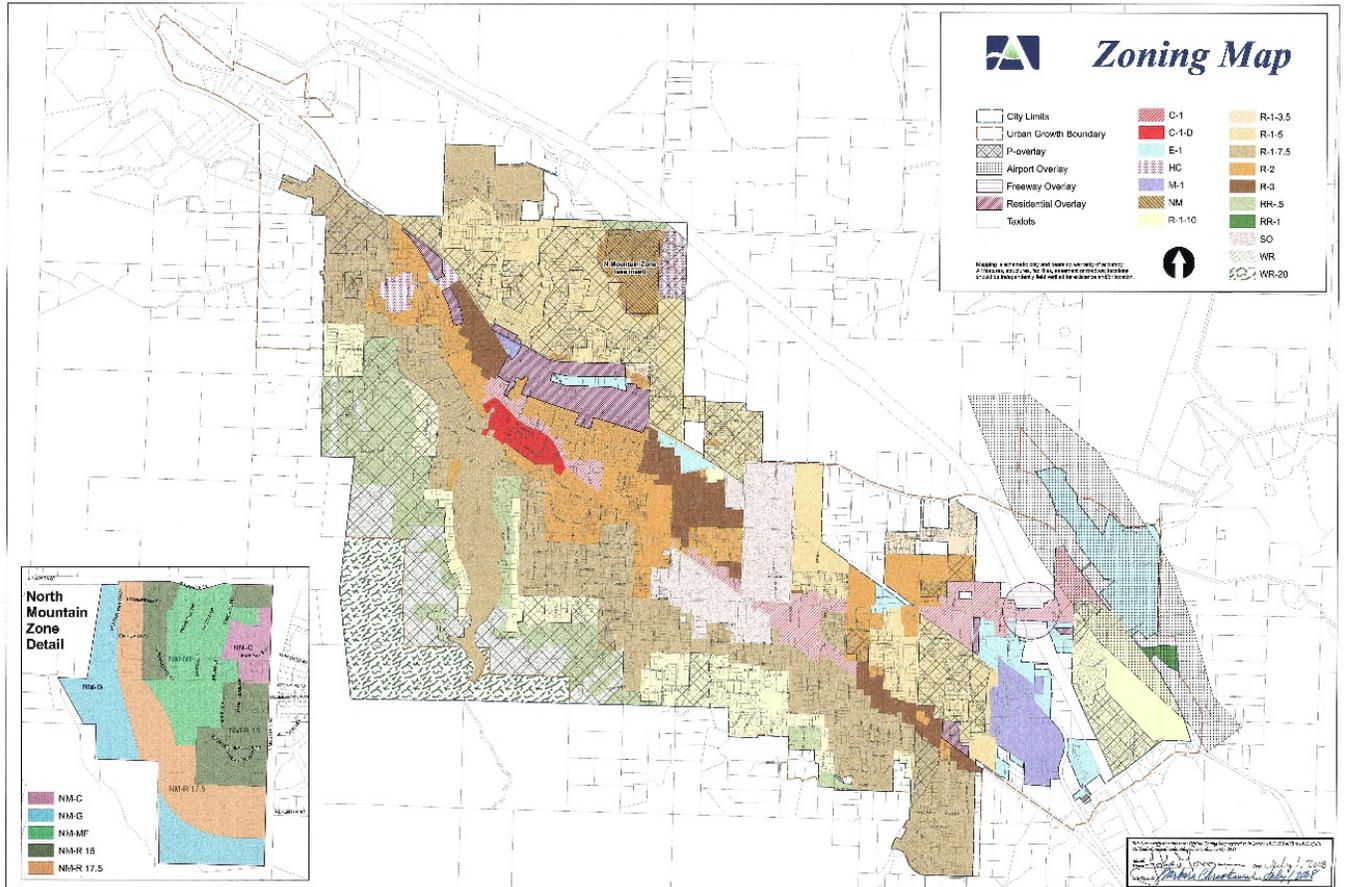


Source(s): CHAS 2017-2021; CAI 2025.

Local Land Use Setting

Ashland’s total land area is 4,256 acres (gross land area, including all rights-of-way) (**Exhibit 19**). Ashland’s land area net of rights-of-way is estimated to be 3,553 acres, of which 46% are zoned for single-family residential uses.

Exhibit 19. Ashland Zoning Map

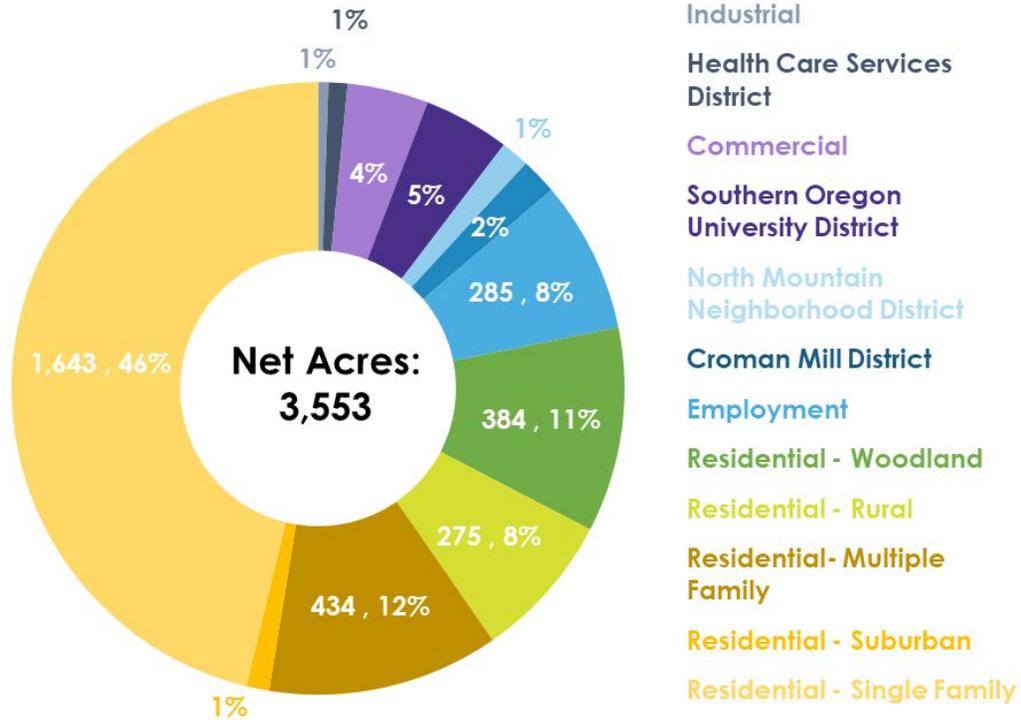


Sources: Ashland Open Data Portal, 2024.

Commercial-zoned land represents about 4% of Ashland’s land area (net rights-of-way), while industrial land represents 1% (**Exhibit 20**). Ashland’s Employment district makes up 8%, or 285 acres. Some of the land zoned for commercial, industrial, or employment uses are subject to overlays which may limit the uses or development potential on these parcels.

The Croman Mill District (68 acres) and North Mountain Neighborhood District (53 acres) each offer mixed uses, which includes employment potential, but are subject to development regulations.

Exhibit 20. Ashland Land by Zoning Designation, 2025



Source: Ashland Open Data Portal, 2025; CAI, 2025.

Climate

Ashland has a mild climate with four distinct seasons, influenced by its location on the West Coast and within the surrounding mountains. Situated at approximately 2,000 feet above sea level, the city is framed by Mt. Ashland to the south, rising to 7,500 feet, and the Cascade Range to the north and east. Ashland receives an average of 19.5 inches of rainfall annually, and less than 0.5 inches per year.

The City of Ashland completed an Addendum to Jackson County's Multi-Jurisdictional Natural Hazard Mitigation Plan in 2024. It describes Ashland's climate and describes hazard probability and vulnerability within the City. Climate related risks which have been rated as both high probability and high vulnerability for Ashland are Wildfire, Severe Weather (such as Extreme Heat, Windstorm, Winter Storm), Earthquake hazard, Drought hazard, and Air Quality (**Exhibit 21**). Air quality issues are linked to increased frequency and severity of wildfire smoke and climate change impacts, including higher ground-level ozone and fine particulate matter. These climate risks have impacts on public health and safety as well as impacts on economic activities and growth.

Exhibit 21. Climate Hazards Analysis, Ashland, 2024-2029

Hazard	History	Vulnerability	Maximum Threat	Probability	Total Threat Score	Hazard Rank	Hazard Tiers
Wildfire	18	45	100	70	233	#1	Top Tier
Extreme Heat Event	18	40	80	70	208	#2	
Emerging Infectious Disease	16	40	100	49	205	#3	
Earthquake - Cascadia	2	50	100	49	201	#4	
Winter Storm	20	50	60	70	200	#5	
Drought	20	50	60	63	193	#6	Middle Tier
Windstorm	20	50	50	70	190	#7	
Air Quality	18	40	60	63	181	#8	
Landslide	10	35	80	56	181	#9	
Flood	20	30	60	70	180	#10	
Earthquake - Crustal	2	25	70	21	118	#11	Bottom Tier
Volcanic Event	2	5	50	7	64	#12	

Sources: City of Ashland Addendum to the Jackson County Multi-Jurisdictional Natural Hazard Mitigation Plan, 2024.

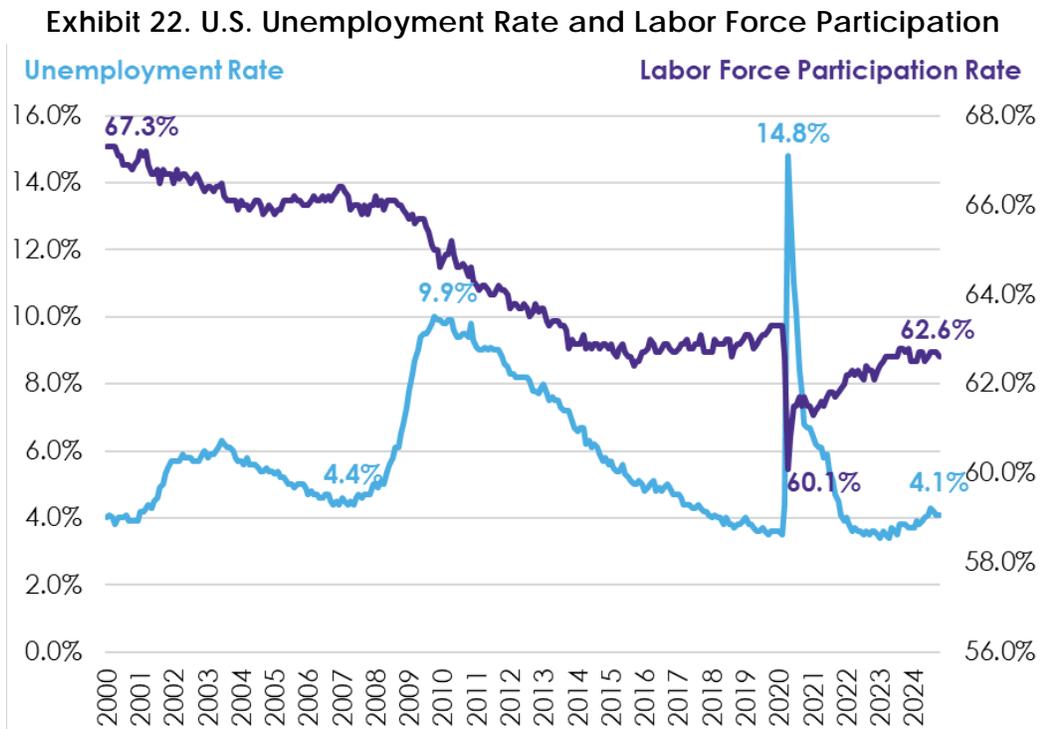
NATIONAL, STATE, AND REGIONAL ECONOMIC TRENDS

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 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 22**). 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.



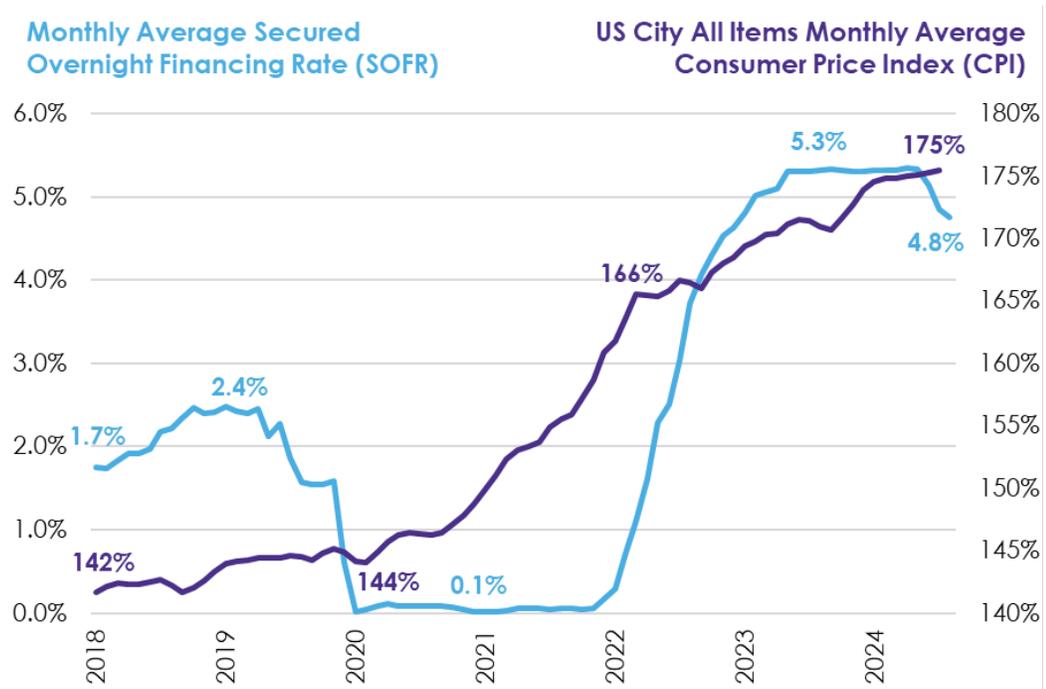
Sources: U.S. Bureau of Labor Statistics, 2024; CAI, 2024.

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, SOFR dropped to near-zero levels (0.1%) while the CPI began to increase (**Exhibit 23**). 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 an 15% average annual growth rate 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 23. 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.

From 2010 to 2023, Oregon experienced a 12% growth in statewide population. Jackson County’s population grew by 10% in this timeframe, reflecting moderate but slower growth compared to rapidly expanding counties like Deschutes County (34%) and Crook County (26%). In contrast, Josephine County grew by 7%, below the statewide average.

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 24**).

Exhibit 24. Historic Population Growth Estimates, Jackson County, Josephine County, Medford and Ashland, 1980-2023

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			83,115	90,887	3.0%
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, 2023; CAI, 2024.

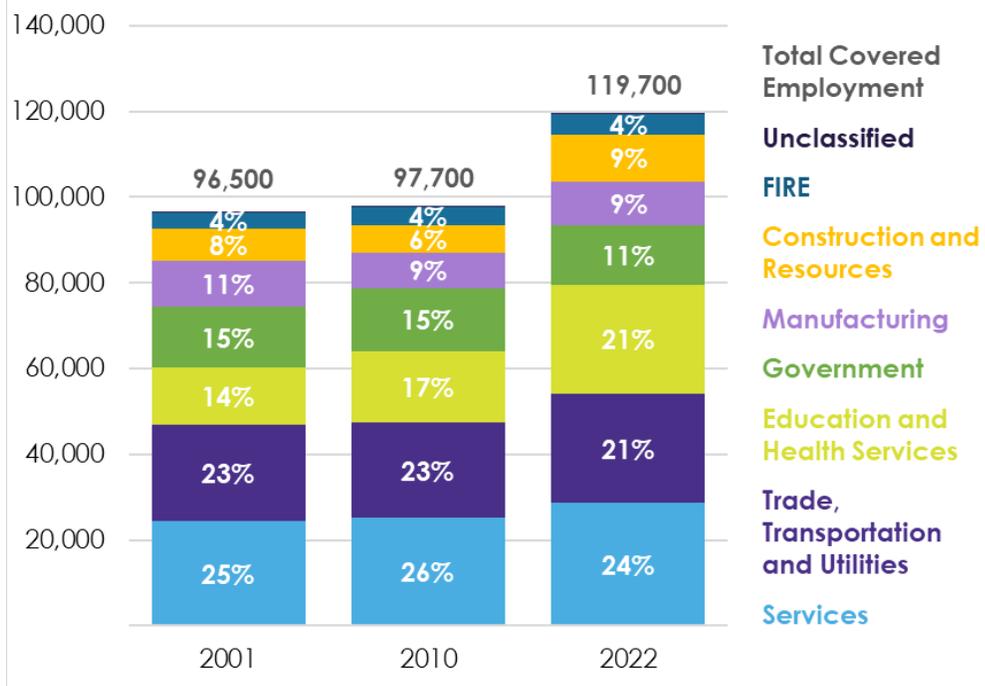
Industry Employment and Wages

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.

Covered employment includes wage and salary jobs that are covered by state unemployment insurance. Covered employment includes most jobs, but excludes self-employed individuals, military personnel, and certain exempt sectors such as some agricultural or domestic work. It includes all part-time and full-time jobs. For the Jackson and Josephine 2-County region, the major industry sectors that account for the most covered jobs in 2022 are Services (with 24% of all jobs within the two counties); Trade, Transportation, and Utilities (21%); and Education Services⁵ and Health Services (21%) (**Exhibit 25**). A list of the 2-digit NAICS code industries that are included in each major industry sector is described in **Exhibit 26**.

⁵ Employment on public sector institutions, such as Southern Oregon University are included in Government.

Exhibit 25. Total Covered Employment by Major Industry Sector, Jackson and Josephine 2-County Region, 2001, 2010, & 2022



Sources: Oregon Employment Department; Bureau of Labor Statistics, Quarterly Census of Employment & Wages, 2001, 2010 & 2022; CAI 2024.

Note 1: FIRE industry group includes Finance, Insurance and Real Estate.

Exhibit 26. Major Industry Sectors by Corresponding NAICS Codes, 2022

Industry Aggregates	2-Digit NAICS	2-Digit NAICS Industry Description
Construction and Resources	11	Agriculture, Forestry, Fishing and Hunting
	21	Mining, Quarrying, and Oil and Gas Extraction
	23	Construction
Trade, Transportation, Utilities	22	Utilities
	42	Wholesale Trade
	44	Retail Trade
	45	Retail Trade
	48	Transportation and Warehousing
	49	Transportation and Warehousing
Manufacturing	31	Manufacturing
	32	Manufacturing
	33	Manufacturing
FIRE	52	Finance and Insurance
	53	Real Estate and Rental and Leasing
Education and Health Services	61	Educational Services
	62	Health Care and Social Assistance
Services	51	Information
	54	Professional, Scientific, and Technical Services
	55	Management of Companies and Enterprises
	56	Administrative and Support and Waste Management and Remediation Services
	71	Arts, Entertainment, and Recreation
	72	Accommodation and Food Services
	81	Other Services (except Public Administration)
Unclassified	99	Unclassified
Government	All Government	Federal Government
		State Government
		Local Government

Source: US Census, 2025.

Jackson County’s covered employment has grown steadily since 2010, adding 14,350 jobs at a CAGR of 1.5% to reach approximately 89,800 total jobs in 2022 (**Exhibit 27**). The fastest growing 2-digit NAICS code industry sectors from 2010 to 2022 were Construction (adding 2,439 jobs with a CAGR of 5.4%), Education (+379, CAGR of 4.1%) and Resources (+1,343, CAGR of 4.0%) industries.

**Exhibit 27. Covered Employment Change Over Time by Industry,
Jackson County, 2010 & 2022**

Industry	NAICS Code	2010	2022	Net Change (2010-2022)	CAGR (2010-2022)	Employment Forecast* (2035)	Average Wages 2010	Average Wages 2022
Construction	23	2,789	5,228	2,439	5.4%	10,327	\$38,235	\$60,220
Educational Services	61	617	996	379	4.1%	1,673	\$24,597	\$39,183
Natural Resources and Mining	11, 21	2,258	3,601	1,343	4.0%	5,971	\$25,398	\$46,280
Professional, Scientific, and Technical Services	54	1,948	2,985	1,037	3.6%	4,740	\$38,935	\$74,399
Health Care and Social Assistance	62	11,806	16,561	4,755	2.9%	23,896	\$43,095	\$64,298
Transportation, Warehousing & Utilities	48	2,555	3,351	796	2.3%	4,495	\$40,163	\$64,346
Real Estate and Rental and Leasing	53	975	1,253	278	2.1%	1,644	\$23,209	\$45,359
Accommodation and Food Services	72	7,315	8,963	1,648	1.7%	11,170	\$15,268	\$24,771
Manufacturing	31-33	6,052	7,392	1,340	1.7%	9,180	\$40,386	\$60,222
Wholesale Trade	42	2,190	2,497	307	1.1%	2,878	\$42,815	\$62,535
Administrative and Support and Waste Management	56	3,109	3,530	421	1.1%	4,051	\$24,574	\$46,357
Retail Trade	44	12,574	14,010	1,436	0.9%	15,751	\$26,565	\$40,323
Arts, Entertainment, and Recreation	71	1,426	1,427	1	0.0%	1,428	\$22,187	\$32,805
Other Services	81	2,820	2,755	(65)	-0.2%	2,686	\$22,936	\$38,787
Finance and Insurance	52	2,216	2,140	(76)	-0.3%	2,061	\$45,957	\$82,652
Government		11,444	10,502	(942)	-0.7%	9,569	\$41,885	\$63,764
Management of Companies and Enterprises	55	1,667	1,440	(227)	-1.2%	1,229	\$59,493	\$109,628
Information	51	1,677	981	(696)	-4.4%	549	\$39,820	\$80,218
Unclassified	99	11	188	177	26.7%	4,071	\$44,817	\$70,055
Total		75,449	89,799	14,350	1.5%	108,440	\$38,935	\$60,222

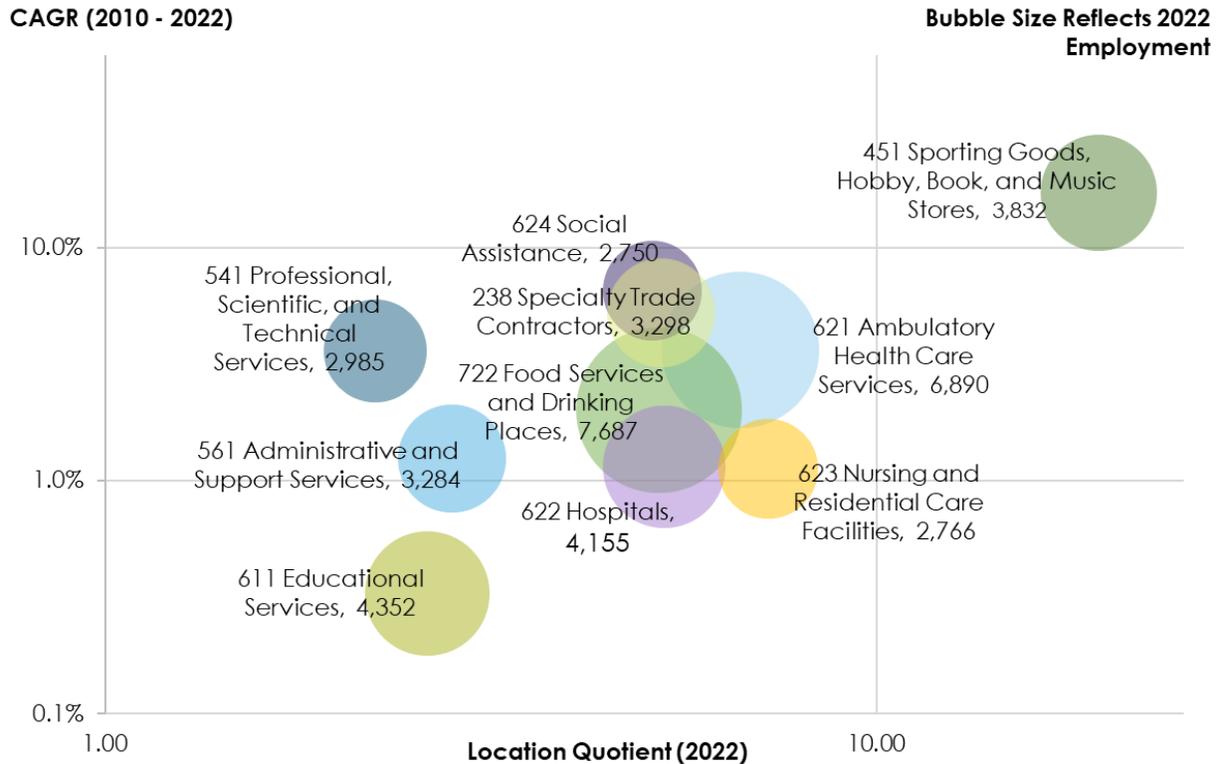
Sources: Oregon Employment Department, BLS, QCEW 2001, 2010 & 2022; CAI 2024.

Some more narrowly defined industries are concentrated and growing in Jackson County, 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 28**). 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 28. Top 10 Industries (at 3-digit NAICS) by Employment, Location Quotient, and Growth, Jackson County



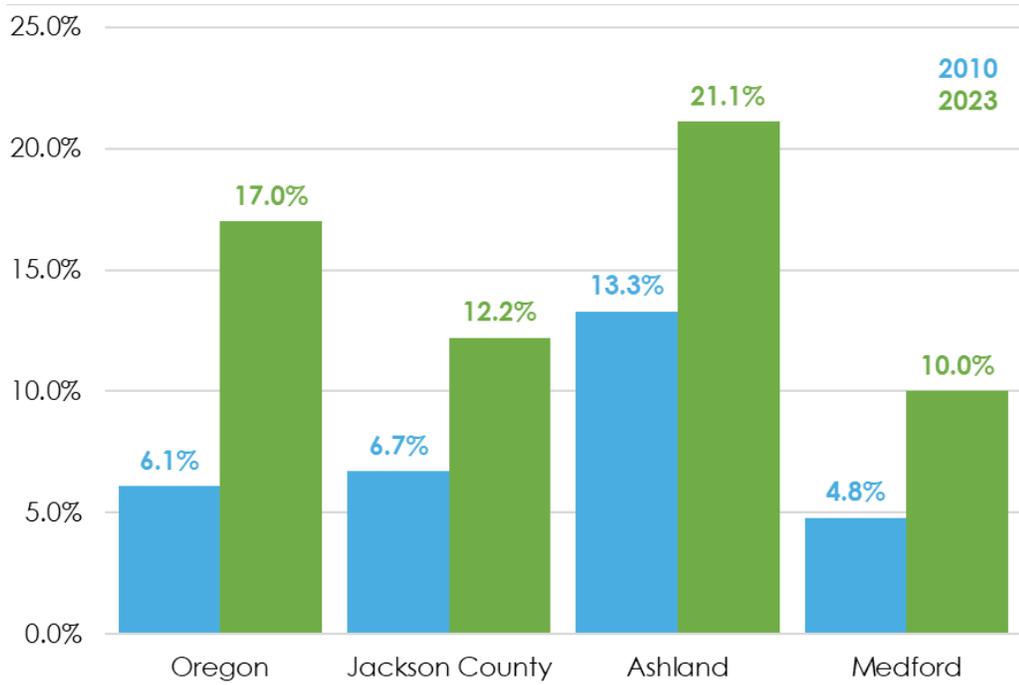
Sources: Oregon Employment Department 2010 & 2022; U.S. Bureau of Labor Statistics, 2022; CAI 2024.

Workforce and Wages

The proportion of working residents (16 and older) who report working from home has increased significantly across Oregon and Jackson County since 2010 (**Exhibit 29**). In 2010, 6.1% of Oregon’s working residents reported working from home; by 2023, that figure had risen to 17.0%, representing a compound annual growth rate of 8.2%. Ashland had the highest share of at-home workers highest share among whom? All cities in Oregon? in 2010 at 13.3%, and experienced a similar growth trajectory, with a CAGR of 7.8% over the same period. By 2023, 21.1% of Ashland’s residents who work reported working from home. Is this still the highest share?

The Census Bureau’s American Community Survey does not differentiate between remote workers, home occupations or other work-from-home arrangements. However, the elevated proportion of workers reporting at-home work aligns with larger trends towards remote work following the pandemic. In Ashland, the higher share of residents working from home may reflect both the local shift toward remote jobs and the city’s appeal to remote workers relocating from elsewhere in response to broader remote work trends.

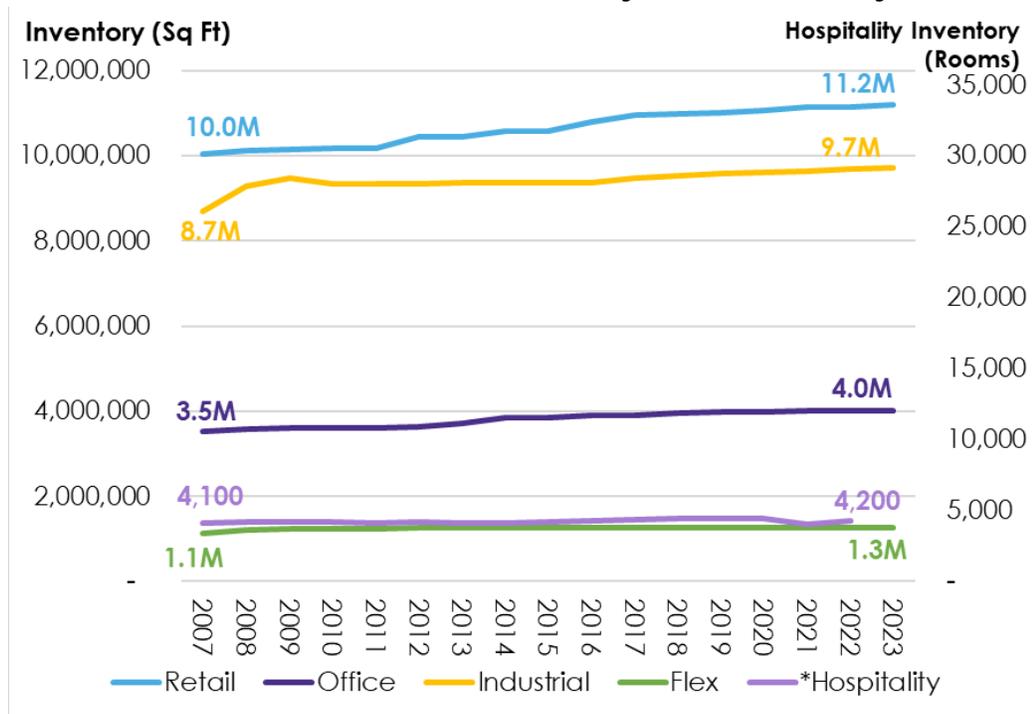
Exhibit 29. Proportion of Workers 16+ Who Work from Home, Oregon, Jackson County, Ashland & Medford, 2010 & 2023



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

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 30**). Average annual wages in Jackson County are generally lower than wages at the State level.

Exhibit 31. Commercial Real Estate Inventory, Jackson County, 2007-2023



Sources: Costar, 2007-2023; CAI 2024.

LOCAL ECONOMIC CHARACTERISTICS AND TRENDS

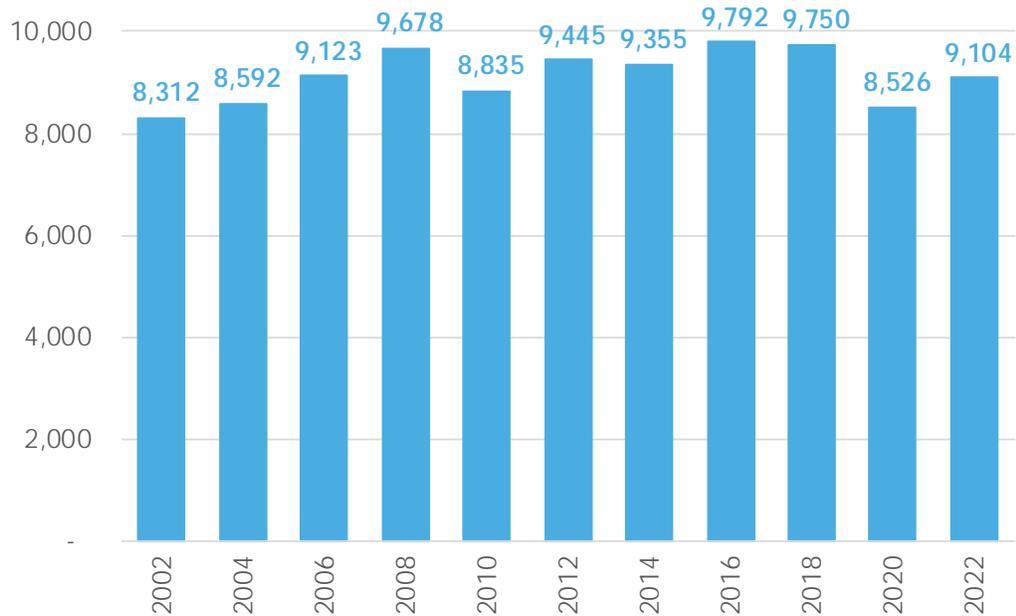
This section analyzes data on Ashland’s local economy—including industry composition, employment, workforce and commuting patterns, market conditions, and other key metrics—to describe local economic characteristics and trends.

Industry and Workforce

Ashland’s Industries and Employment

Local employment data are challenging to present, given the latency of publication and constraints among varying data providers. According to the US Census LODES data, total (private and public) employment in Ashland has experienced both growth and decline since 2002, ending with a total of 9,104 jobs in 2022, the most recent year available during report production (**Exhibit 32**).

Exhibit 32. Total Job Growth, Ashland, 2002 to 2022



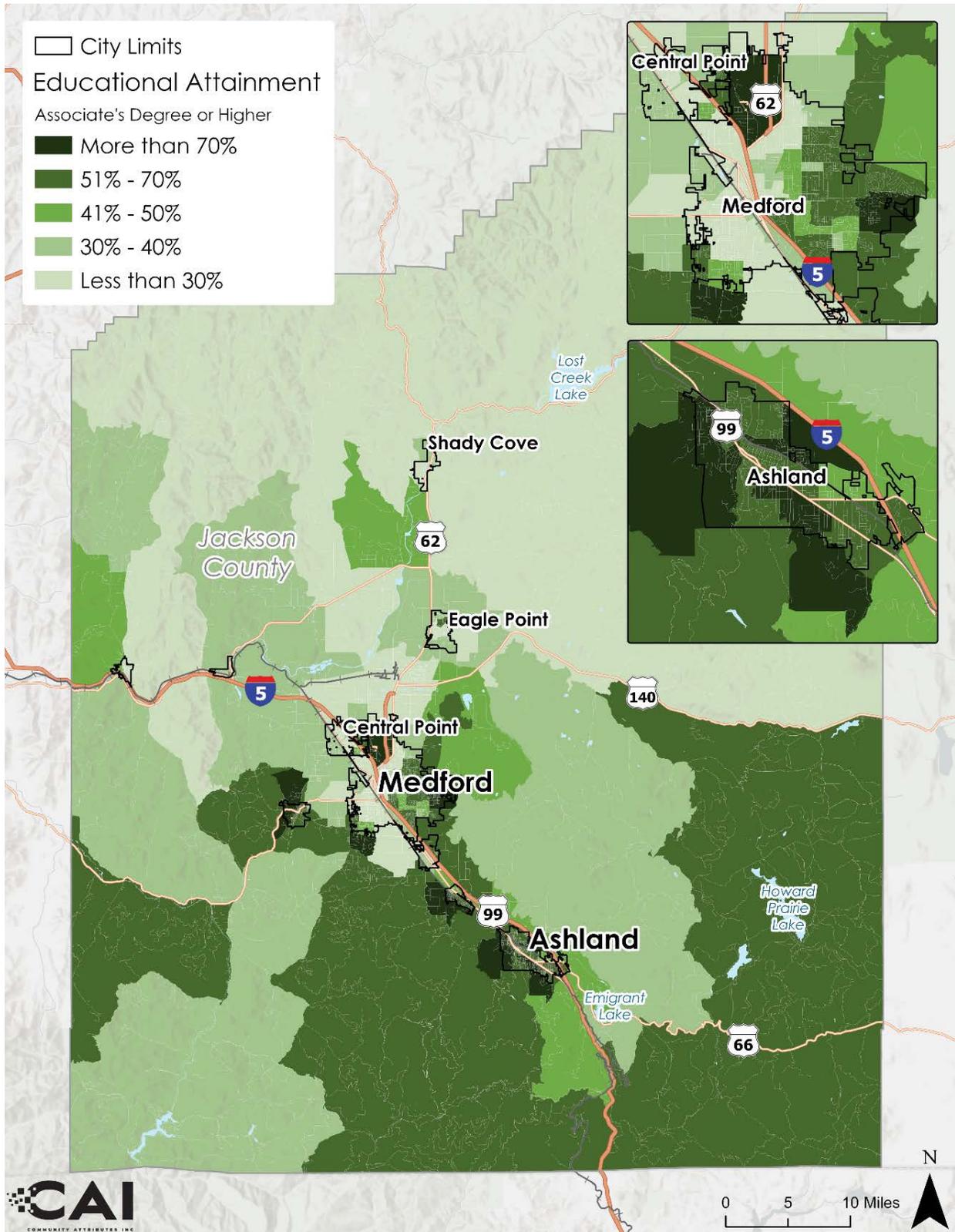
Sources: LEHD Origin-Destination Employment Statistics Longitudinal Employer-Household Dynamics (LODES), 2002-2022; CAI 2025.

Ashland’s top private sector industries in 2023 by employment were Accommodation and Food Services (with 1,860 jobs), Retail Trade (1,471 jobs), and Health Care (1,354 jobs) (**Exhibit 33**). The different data sources (LODES in **Exhibit 32**, versus OED in **Exhibit 33**) result in different totals

Ashland's Labor- and Commute- Sheds

Ashland's residents are highly educated, contributing to a well-qualified labor pool. As of 2023, 62% of the population holds a bachelor's degree or higher, compared to 28% in Medford (**Exhibit 36**).

Exhibit 36. Educational Attainment by Block Group, Jackson County, 2022



Sources: Jackson County Open Data Portal, 2024; U.S. Census Bureau ACS 5-Year 2018-2022 Estimates; CAI, 2024.

However, the Rogue Valley’s labor and commute sheds are very intertwined. Ashland’s residents travel all over the valley to work, including to Medford, which serves as a primary employment hub in the Rogue Valley.

According to the Census Bureau’s 2022 commute data, Ashland had 5,783 employed residents in 2022 (**Exhibit 37**). Just 37% worked within the city, while 63% commuted to jobs outside of Ashland.

Ashland’s workforce, however, included 6,910 people. Of these, only 31% (2,158 individuals) both lived and worked in Ashland, while the remaining 69% commuted in from other communities.

Exhibit 37. Commuting Patterns of Ashland’s Workforce and Residents, Ashland, 2022

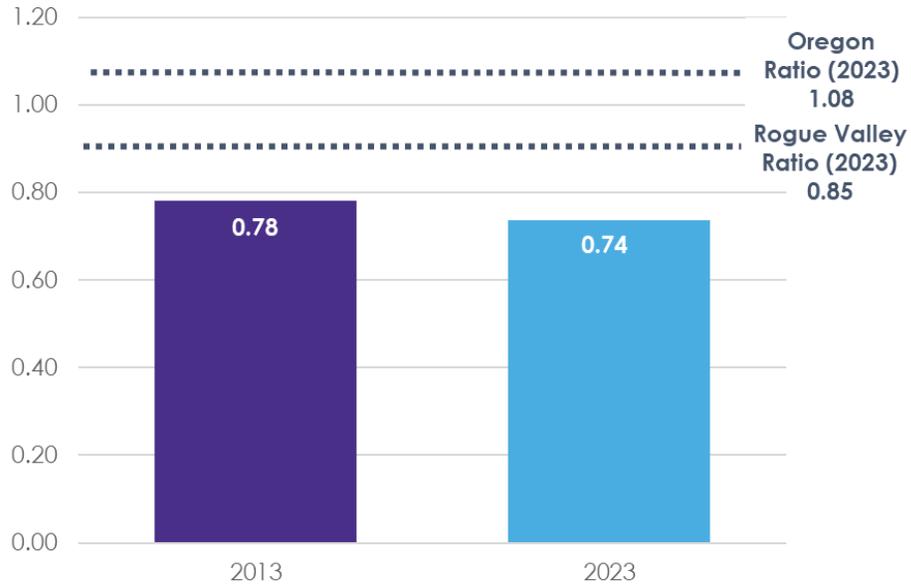
Metric	Count	Share of Ashland Residents	Share of Ashland Workers
Total Employed in Ashland	6,910		
Total Living in Ashland	5,783		
Net Inflow of Workers	1,127		
Both Live and Work in Ashland	2,158	37%	31%
Work in Ashland, Live Outside	4,752		69%
Live in Ashland, Work Outside	3,625	63%	

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

Considering that many of Ashland’s working residents commute elsewhere for employment, while a significant share of local jobs are filled by workers commuting into the city. This dynamic suggests a mismatch between the types of jobs available in Ashland and the skills or preferences of its resident workforce.

Ashland’s jobs-to-housing unit ratio is 0.74 in 2023, down slightly from 0.78 in 2013 (**Exhibit 38**). This modest decline points to a growing imbalance between local employment opportunities and housing availability. A ratio below 1.0 indicates there are fewer jobs than housing units, which may reflect demographic factors—such as a higher share of retirees—and regional commuting patterns. Compared to the Rogue Valley (0.85) and Medford (1.35), Ashland’s lower ratio is likely impacted by both a reduced labor force participation due to a high proportion of seniors (**Exhibit 2**) and the outflow of residents commuting elsewhere for work (as described in **Exhibit 37** above).

Exhibit 38. Job to Housing Unit Ratio, Ashland, 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.

In 2022, these dynamics come together to result in a net inflow of 1,685 workers into Ashland (**Exhibit 39**). 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 Ashland and the total number of Ashland residents working in each industry. As such, they do not account for residents who may commute elsewhere for similar jobs, and should be interpreted as a rough indicator of industry-level labor exchange.

In Ashland, industries with the highest net inflow include Accommodation and Food Services (+638), Educational Services (+596), and Retail Trade (+354). These patterns suggest relatively higher demand for labor in these sectors compared to the local workforce available to fill them.

**Exhibit 39. Total Employment Labor Inflow & Outflow by Industry,
Ashland, 2022**

Jobs in Ashland	Jobs in Ashland	Jobs of Ashland Residents	Inflow / (Outflow)
Accommodation and Food Services	1,620	982	638
Educational Services	1,362	766	596
Retail Trade	1,379	1,025	354
Arts, Entertainment, and Recreation	674	334	340
Manufacturing	589	423	166
Professional, Scientific, and Technical Services	480	349	131
Information	244	159	85
Other Services (excluding Public Administration)	377	293	84
Administration & Support, Waste Management and Remediation Services	320	315	5
Mining, Quarrying, and Oil and Gas Extraction	7	4	3
Real Estate and Rental and Leasing	118	120	(2)
Utilities	-	11	(11)
Wholesale Trade	143	163	(20)
Finance and Insurance	140	168	(28)
Management of Companies and Enterprises	51	96	(45)
Public Administration	188	271	(83)
Transportation and Warehousing	64	155	(91)
Agriculture, Forestry, Fishing and Hunting	40	172	(132)
Construction	179	322	(143)
Health Care and Social Assistance	1,129	1,291	(162)
	9,104	7,419	1,685

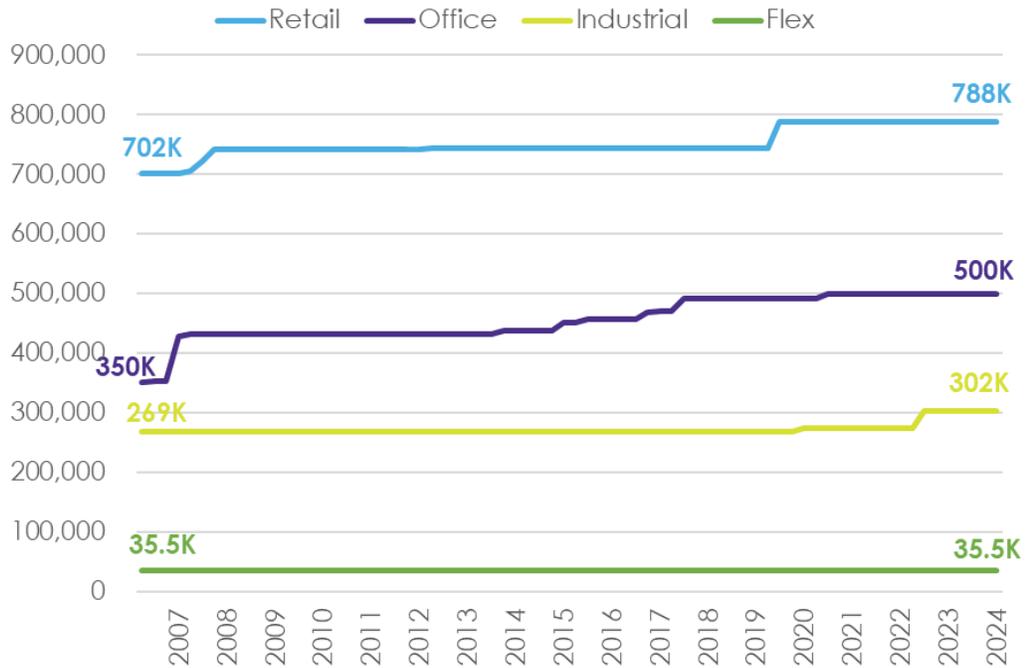
Sources: LEHD Origin-Destination Employment Statistics Longitudinal Employer-Household Dynamics (LODES), 2022; CAI 2025.

Ashland's Market Conditions

Commercial Real Estate Inventory

Ashland's retail inventory increased from 702,000 square feet in 2007 to 788,000 square feet in 2024, maintaining the largest share of commercial real estate inventory in the city (**Exhibit 40**). Office space grew from 350,000 square feet in 2007 to 500,000 square feet in 2024. Industrial inventory increased gradually, starting at 269,000 square feet in 2007 and reaching 302,000 square feet in 2024. Industrial inventory increased gradually, starting at 269,000 square feet in 2007 and reaching 302,000 square feet in 2024.

Exhibit 40. Square Footage of Inventory by Typology, Ashland, 2007-2024

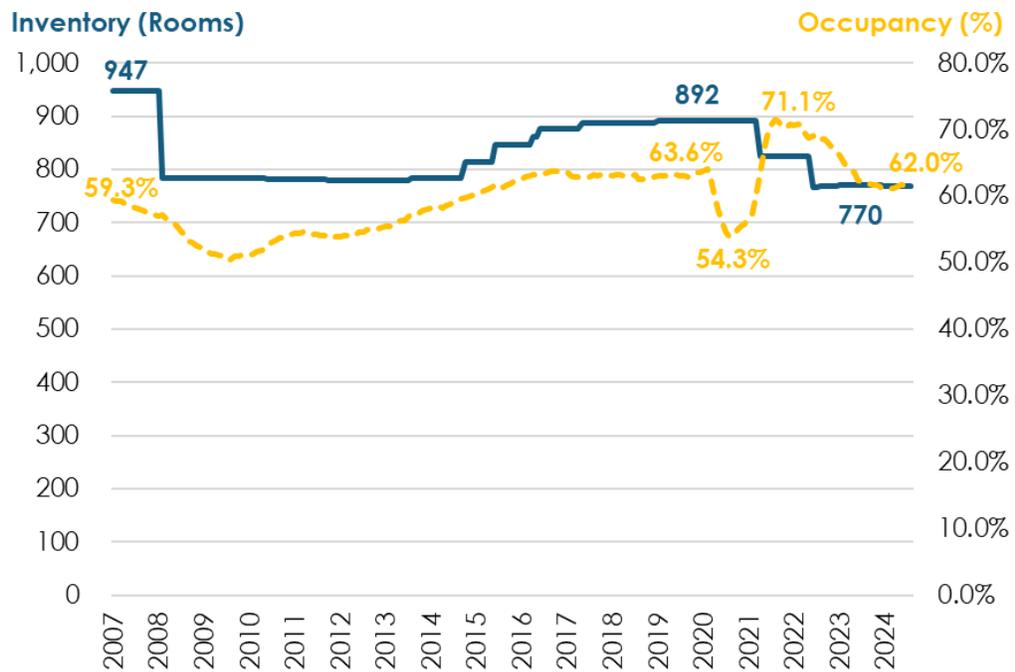


Source(s): Costar, 2024; CAI, 2025.

Hospitality

Hospitality real estate inventory in Ashland, measured by the number of rooms, decreased from 947 rooms in 2007 to 770 rooms in 2024 (**Exhibit 41**). After an initial decline in inventory in 2008, the number of rooms grew modestly, peaking at 892 rooms in 2020 before declining again. Occupancy rates began at 59.3% in 2007, peaked at 71.1% in 2019, and declined to 62.0% in 2024, with a significant dip to 54.3% in 2020. Despite some recovery in occupancy rates post-2020, both inventory and occupancy remain below their earlier peaks.

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



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

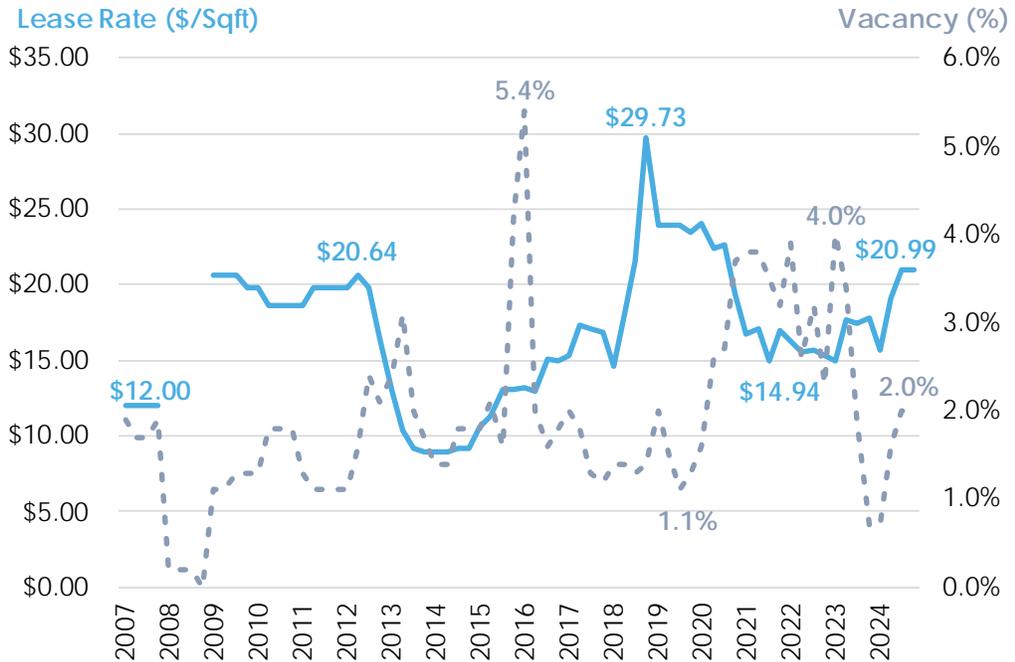
Retail

Exhibit 42 explores retail lease rates and vacancy trends in Ashland from 2007 to 2024. Retail lease rates started at \$12.00 per square foot in 2007, reached a peak of \$29.73 per square foot in 2018, and declined to \$20.99 per square foot as of 2024. Retail vacancy rates fluctuated, beginning at 5.4% in 2007, reaching a low of 1.1% in 2020, and ending at 2.0% in 2024, with a temporary increase to 4.0% in 2023.

This reflects a different trend to that seen in the Rogue Valley region. Annual average vacancy rates for retail in the Rogue Valley fluctuated from 2.4%-3.9% from 2009-2024, landing at 3.05% in 2024. Lease rates peaked in

the Rogue Valley in 2022, with \$17.06 per square foot, before dropping slightly to \$16.55 in 2024.

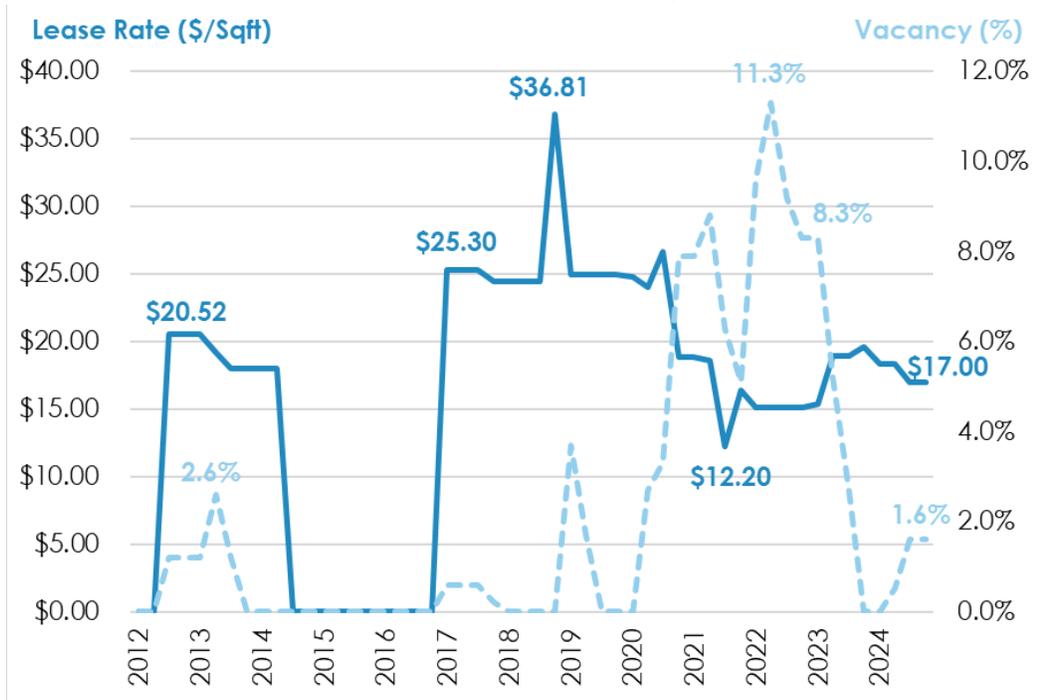
Exhibit 42. Retail Lease and Vacancy Rate, Ashland, 2007-2024



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

Retail lease and vacancy trends in Downtown Ashland have diverged from the citywide market somewhat (**Exhibit 43**). Downtown lease rates, like lease rates city-wide, peaked in 2019. However, its lease rates were more volatile than at the city level, with the peak very briefly reaching \$36.81. Downtown lease rates have decreased since, reaching \$17.00 in 2024. Similarly, downtown vacancy rates spiked sharply to 11.3% in 2021 before declining to 1.6% in 2024, whereas citywide vacancy has remained more stable. These patterns suggest that downtown Ashland experienced a more intense cycle of disruption and recovery, possibly reflecting its concentration of tourism-facing retail or greater exposure to pandemic-related impacts. Despite this, current downtown vacancy is low, signaling potential for a rebound in tenant demand.

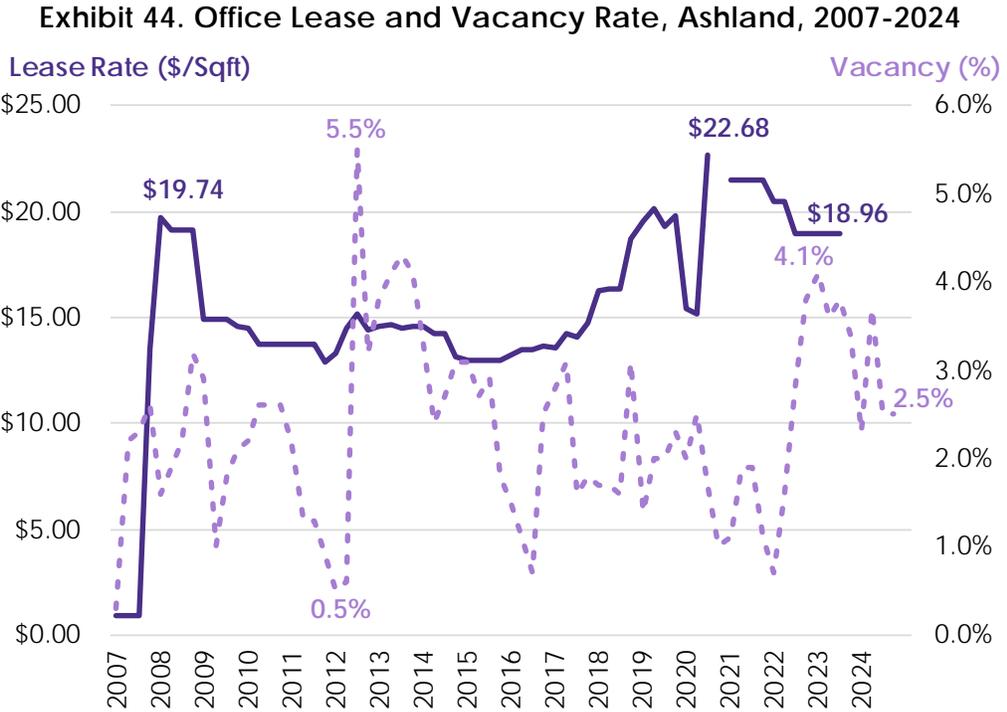
Exhibit 43. Downtown Retail Lease and Vacancy Rate, Ashland, 2012-2024



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

Office

Office lease rates peaked at \$22.68 per square foot in 2021 but declined to \$18.96 by 2023 (**Exhibit 44**). Vacancy rates fluctuated but remained low, ending at 2.5% in 2024. This is lower than the 2024 average vacancy rate for office space in the Rogue Valley region of 4.73%.

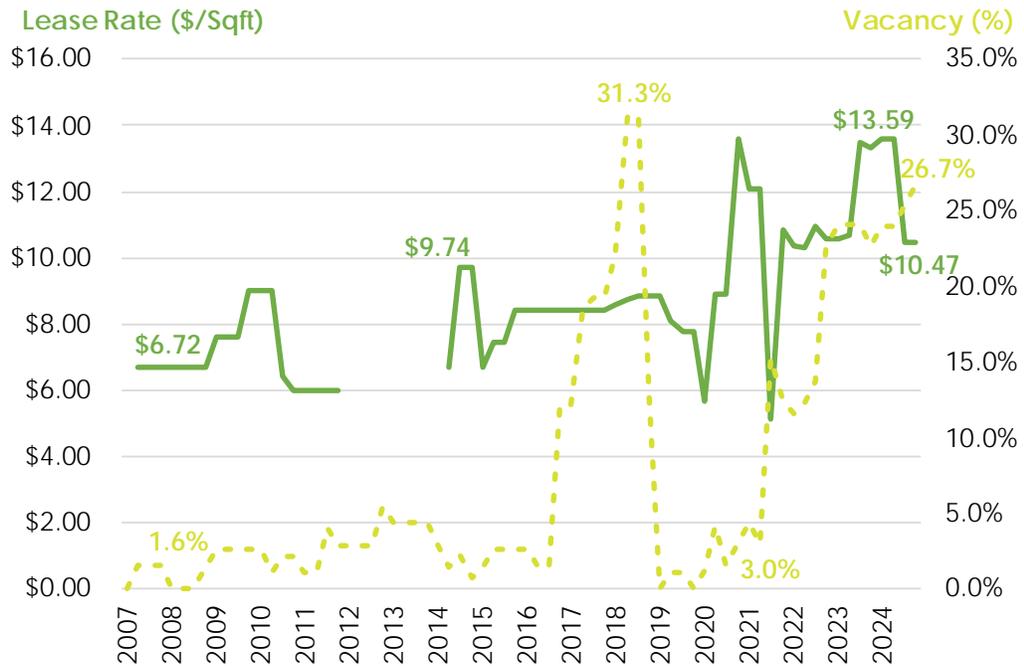


Source(s): Costar, 2024; CAI, 2025.

Industrial

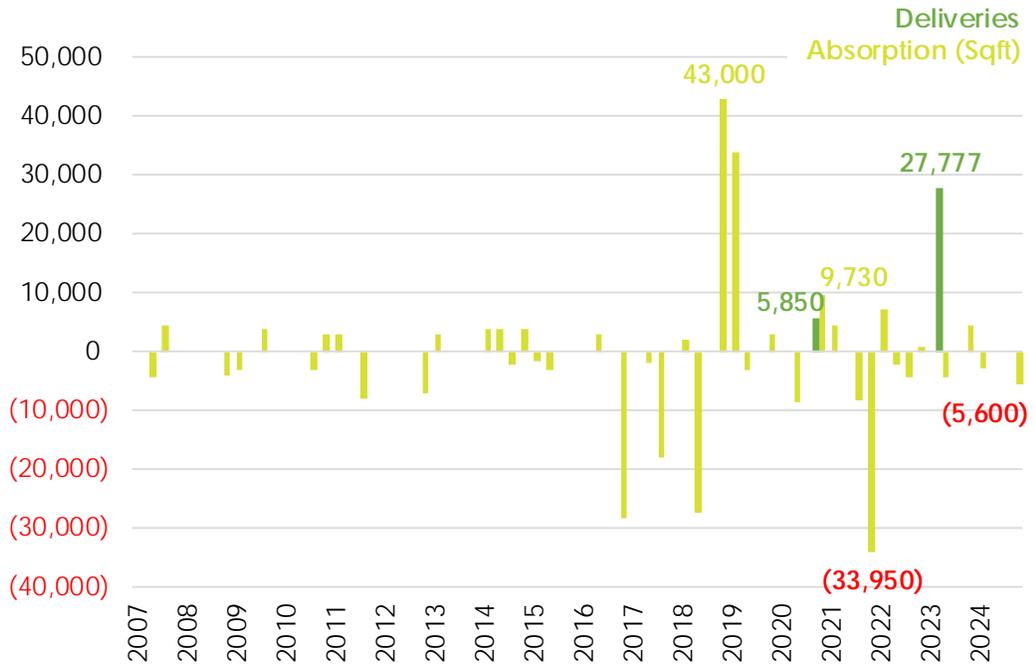
Industrial lease rates in Ashland peaked at \$13.59 per square foot in 2023 before declining to \$10.47 in 2024 (**Exhibit 45**). Industrial vacancy rates increased from near 0% in 2019 to 26.7% in 2024. The sharp rise in Ashland’s industrial vacancy rate since 2019 may be attributed to a combination of new space deliveries outpacing tenant demand, pandemic-related business disruptions, and increased competition from nearby markets such as Rogue Valley, where vacancy rates remain comparatively low (**Exhibit 46**).

Exhibit 45. Industrial Lease and Vacancy, Ashland, 2007-2024



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

Exhibit 46. Industrial Absorption and Deliveries, Ashland, 2010-2023



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

EMPLOYMENT LANDS SUFFICIENCY ASSESSMENT

Background

Oregon law OAR 660-009-0015 requires that cities maintain a buildable lands inventory within the UGB sufficient to accommodate the residential, employment and other urban uses such as public facilities, streets, parks and open space needed for a 20-year planning period.

The City of Ashland’s 2024 Buildable Lands Inventory (BLI) mapped net buildable land supply by Comprehensive Plan and Zoning categories for the City and Urban Growth Boundary (UGB). Along with the 2021 Housing Capacity Analysis, the BLI largely focused on residential land capacity and determined that sufficient supply exists to satisfy residential growth needs for housing units for the 20-year planning horizon.

This 2024-2025 Economic Opportunity Analysis update forecasts the demand for employment on commercial and industrial lands and utilizes BLI findings and further analysis to assess whether an adequate supply of land zoned for employment uses is available to meet this forecasted demand.

Methodology

Step 1. Supply

Isolate, extract, and further analyze the supply of buildable employment (commercial and industrial) land from the 2024 BLI.

Step 2. Demand

Using a detailed, customized employment data based on published sources including the Bureau of Labor Statistics (BLS) and Oregon Employment Department, forecast employment in aggregate and by industry / land use is modeled and utilized to estimate land demand by category.

Step 3. Reconcile Supply with Demand

Supply of employment land is reconciled with demand in aggregate and by category.

Step 4. Site Types

A range of site types required to meet Ashland’s forecast demand for employment land are explored and characterized.

Buildable Land Segments

Oregon statutes define Buildable Lands as residentially and commercially designated **vacant**, **partially vacant**, and, at the option of the local jurisdiction, **redevelopable** land within the urban growth boundary that is

not severely constrained by natural hazards, (Statewide Planning Goal 7) or subject to natural resource protection measures (Statewide Planning Goals 5 and 15).”

Consistent with Ashland’s published 2024 BLI methodology, publicly owned land was generally not considered available for commercial or industrial use. Land with **slopes of 35-percent or greater** and land within the **100-year flood plain** was not considered buildable; for the purposes of this analysis, portions of otherwise buildable parcels intersecting with such constraints have had acreage deducted from the gross total, resulting in a **net buildable acreage** figure⁷.

For the buildable lands analysis conducted for this EOA, the following categories were defined and utilized:

Vacant: Vacant lots were those parcels that were free of improvements (structures) and were available for future commercial or industrial development. Alternative designations were assigned to those parcels that, although physically vacant, were **not** considered suitable for residential or commercial development.

- Vacant/Undevelopable: Unbuildable whole parcels due to physical constraints including:
 - Slopes in excess of 35%
 - Location within the floodway
 - Location within the 100-year flood plain
 - Location in resource protection areas
- Vacant/Airport: Land reserved for Ashland Municipal Airport uses.
- Vacant/Open Space: Land reserved as private open space
- Vacant/Parks: Land reserved as public parks and open space
- Vacant/Parking: Paved parking lots

Partially Vacant: In Commercially zoned lands, those parcels with additional undeveloped land area yet containing a building on a portion of the property were considered partially vacant.

In addition, commercial and industrial properties deemed “**redevelopable**” were included in “partially vacant” category. While “redevelopable” typically refers to parcels upon which there are structures valued at less than 30% of the combined value of the improvements and the land - the high land cost relative to building valuations in Ashland made thee standard calculation method a poor indicator of future supply of land for housing and commercial

⁷ Additional details on methodology may be found in the Quantifying Land Availability & Methodology section of the City of Ashland’s 2024 Buildable Lands inventory.

land needs. However, in mapping all such “redevelopable” properties utilizing the Jackson County Assessors Department’s Real Market Values (RMV) for Land Value (LV) and Improvement Value (IV) the City was better able to identify many properties that were underdeveloped and more appropriately defined as “Partially Vacant”.

Ashland Employment Comp Plan / Zoning Categories

This analysis extracts and examines net buildable acreage (vacant and partially developed) for these five “**employment land**” Comprehensive Plan land use categories:

- **Commercial (C-1)** This district is designed to stabilize, improve and protect the characteristics of those areas providing commercial commodities and services.
- **Commercial-Downtown (C-1-D)** This district is an employment zone that allows retail, office, and other uses.
- **Employment (E-1)** The district is designed to provide for a variety of uses such as office, retail, or manufacturing in an aesthetic environment and having a minimal impact on surrounding uses.
- **Industrial District (M-1)** This district is designed to encourage sound industrial development in the City by providing a protective environment exclusively for such development.
- **The Croman Mill zone (CM-X)** is a group of large parcels of land in south Ashland that have their own set of design elements and permitted, special permitted, and conditional uses. The redevelopment plan for this site was passed by the Ashland City Council in August 2010 and includes a Croman Mill site specific land use code.

Supply of Employment Land

Summary of Buildable Lands Inventory

The 2024 BLI found a combined total area within Ashland’s political boundaries (City + UGB) of **4,958 acres**. Of this, there was a total of **542 acres of “employment land”** (including Industrial, Commercial, Employment, Downtown Commercial, and Croman Mill Employment, Ind. & Mixed Use) found within the City and UGB.

A total of **630 net buildable acres** of land were found within the City and UGB that are developable across all Comprehensive Plan designations, out of a **gross buildable area of 985 acres**.

Exhibit 47. Total Net Buildable Acreage, Ashland and Urban Growth Boundary, 2024

Table 4 - Total Net Buildable acreage (V&PV) UGB & City Limits

BLI_STATUS	# of Parcels	Gross Acreage	Net Buildable Acres
Vacant	363	393	250
Partially Vacant	420	592.4	380.4
Vacant/Airport	10	115.2	per plan
Vacant/UnDevelopable	86	244.7	0
Vacant /Open Space or Park	411	619.1	0
Vacant /Parking	80	22.4	0

Source: Excerpted from Ashland Buildable Lands Inventory, 2024.

Public rights-of-way, parks/open space and civic uses accounted for 27.8% of the City’s total gross acreage. The remaining land is classified as Residential (60.1%), Commercial (11.4%), and Industrial (0.4%).

Total Supply

Total **net buildable supply** for all “**employment land**” categories was **181 acres** per the 2024 BLI analyzed for this work. Net buildable supply is exclusive of constrained areas, such as steep slopes, wetlands, and special flood hazard areas. Gross buildable supply, including constrained areas, totaled 267 acres across 140 parcels.

The 2024 BLI found that most land supply was in the Employment land use category, comprising around 50% of the total buildable acreage, and Croman Mill, comprising another 33%. The least constrained parcels were in the Industrial and Croman Mill designations. Industrial and Employment sites had the lowest built FARs generally. Downtown Commercial parcels represented a small fraction of supply, were heavily constrained, and had much higher FARs.

**Exhibit 48. Developable and Redevelopable Employment Lands by
Category, Ashland, 2024**

Comp Plan Category	Number of Parcels	Gross Acreage	Net Buildable Acreage	Percent Constrained
Croman Mill (Employment, Ind. & MU)	13	85.7	61.1	29%
Downtown (Commercial)	8	2.9	0.44	85%
Employment	89	136.7	90	34%
Commercial	24	25.3	15.2	40%
Industrial	6	16.3	14.6	10%
Total	140.0	266.9	181.3	32%

Sources: Ashland Zoning Map, 2024; Ashland Future Land Use Map, 2024; CAI, 2024.

Supply Location

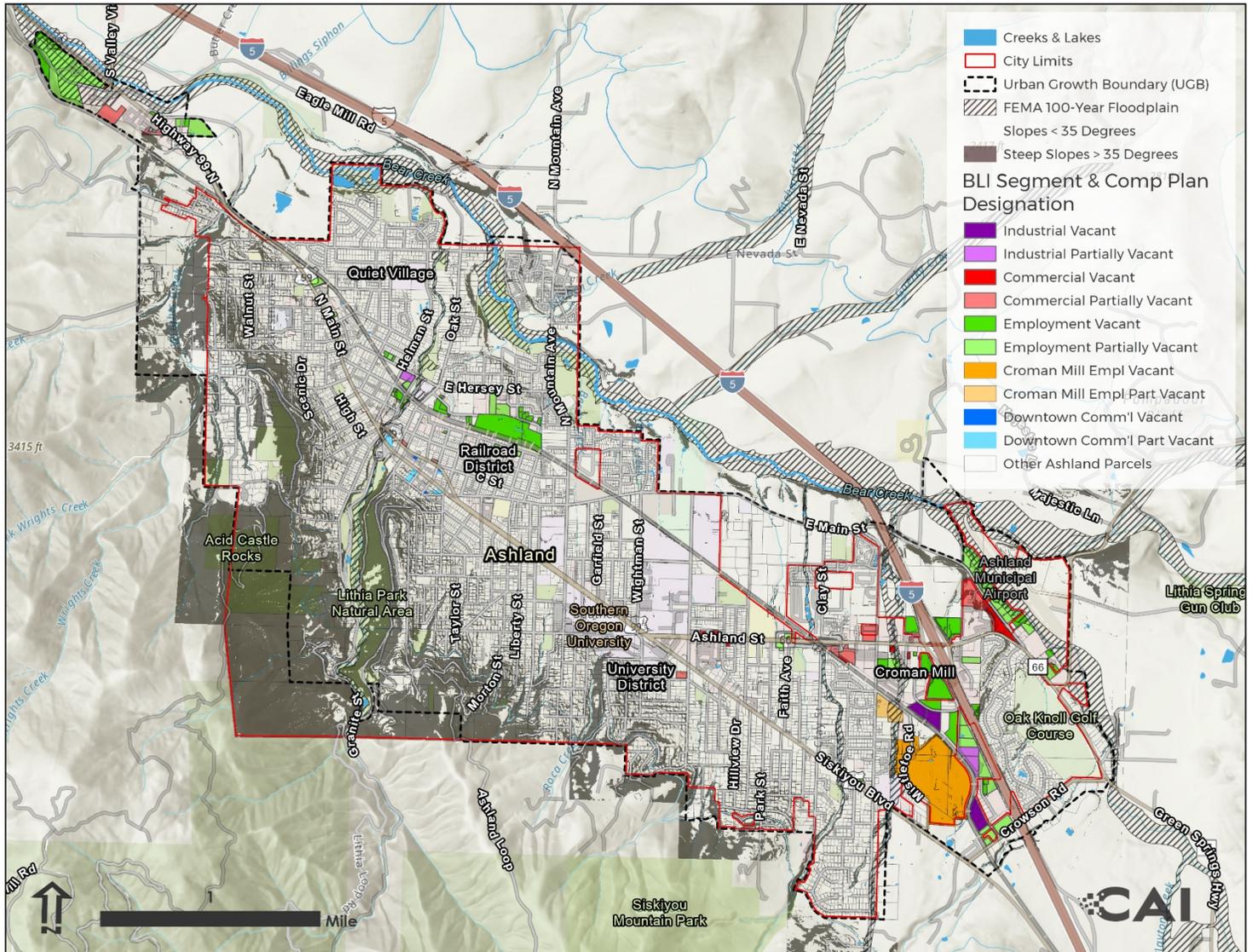
The 2024 BLI found that Ashland’s current buildable employment land supply was located mainly in the City limits (69%, by net buildable acreage).

Most was located in southeast Ashland, and/or adjacent to the Central Oregon & Pacific railroad right of way.

Major nodes were located:

- South of the airport on Main St.;
- Along I-5 and the railroad line from Croman Mill down to Crowson;
- North of the Railroad District in central Ashland, and;
- Around Jackson Rd. and Hwy 99

Exhibit 49. Commercial and Industrial Buildable Lands Map, Ashland, 2024



Sources: Ashland Zoning Map, 2024; Ashland Future Land Use Map; CAI, 2025.

Short Term Supply

The Goal 9 Administrative Rule (OAR 660-009) includes provisions that require that cities within a Metropolitan Planning Organization (MPO) account for and ensure an adequate short-term supply of industrial and other employment lands for near term growth needs. As Ashland is within the Rogue Valley MPO, it is subject to this requirement.

Short term supply, per the administrative rules, refers to land that can be ready for construction in one year based on “engineering feasibility.” For this assessment, CAI and the City of Ashland have interpreted this 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 Ashland’s **short term supply** of employment land sites amounts to a total of **21 parcels** comprising **101.3 acres** of land within the city and / or urban growth boundary. Key pieces of this short term supply include the Croman Mill employment sites, and the large Union Pacific E-1 site north of Downtown Ashland.

In particular, the Croman Mill employment sites identified in this inventory may satisfy this requirement, as all necessary utilities—water, sewer, and electricity—can be extended with the installation of internal streets and supporting infrastructure. While the site contains contaminated soil and requires environmental remediation, a cleanup proposal is currently under review by the Oregon Department of Environmental Quality (DEQ).

In addition to Croman Mill, the large E-1 site between A Street and Hersey owned by Union Pacific also meets the serviceability standard. It has an approved DEQ remediation plan, with cleanup expected to begin in the fall. Once completed, the site will support employment uses and potentially urban residential development. Approximately three acres of the property will remain under a vegetative cap due to residual contamination, which may require additional remediation if more intensive development is pursued.

All essential public facilities and services are available at the perimeter of both sites and can be extended through the properties as needed, which supports their classification as development-ready short term supply sites under Oregon’s Economic Opportunity Analysis (EOA) framework.

For other industrial sites identified in the BLI south of the airport, no impediments were identified to the extension of infrastructure necessary to serve future development. Public facilities such as water, sewer, and transportation connections can be extended as needed in these locations to support employment uses.

In addition to current supply, the Rule requires cities within an MPO 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. As total employment land supply in Ashland amounts to 542 acres, a target of 25% would represent **136 acres**. 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.

Forecasted Employment Land Demand

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

Total and industry sector growth is represented by a twenty-year private employment forecast for the Ashland UGB (2025-2045). This forecasted private employment growth is then mapped to generalized land use typologies (commercial and industrial) corresponding to Ashland's General Comprehensive Plan designations for employment land. Finally, demand for employment land is modeled based on local employment densities derived from existing land absorption patterns cross referenced with site-level employment data.

Forecasted Employment Growth

Forecasted employment growth by industry, given in **Exhibit 34**, is mapped to generalized land use types corresponding broadly to Ashland's employment lands Comprehensive Plan designations (**Exhibit 50**). By 2045, Ashland is forecasted to experience employment growth in the form of an estimated 1,343 jobs generally requiring commercial land and 59 jobs that generally require industrial land (**Exhibit 51**). Mapped land use categories are broad and site sufficiency is examined with greater precision in the subsequent section.

**Exhibit 50. Mapping Employment Forecasts to Generalized Land Uses,
Ashland, 2045**

Industry	20 Year Growth	Generalized Land Use
Leisure & Hospitality	654	Commercial
Retail	(42)	Commercial
Health Care	422	Commercial
Construction, Resources & WTU	27	Industrial
Professional & Business Services	112	Commercial
Manufacturing	12	Industrial
Other Services	67	Commercial
FIRE	165	Commercial
Information	(53)	Commercial
Wholesale	19	Industrial
Education	15	Commercial
Unclassified	3	Commercial
Total	1,401	

Sources: CAI, 2025.

**Exhibit 51. Forecasted Employment by Generalized Land Use Types,
Ashland, 2025 & 2045**

Generalized Land Use	2025 Employment	2045 Employment	Employment Growth
Commercial	7,036	8,378	1,343
Industrial	1,608	1,667	59
Total	8,644	10,045	1,401

Sources: CAI, 2025.

For absorption of vacant land, this analysis converts forecast growth by land use to land demand using locally-derived **assumptions for employment density**. These density figures, in terms of **Employees Per Acre (EPA)** were calculated by dividing summed **site-level employment data by total developed acres per category for Commercial, Commercial-Downtown, Employment, and Industrial sites**. Though the small number of developed industrial sites (8) renders this data less reliable as a reference, other comparables from Medford and recent report commissioned on Croman Mill (by Jonson Economic), demonstrate consistent density findings.

**Exhibit 52. Employment Density Metrics by Land Use Category,
Ashland, 2025**

Employment Comp Plan / Zoning Categories	Total 2025 Site	Developed 2025	
	Employment (Employees)	Site Acreage (Ac)	Employment Density (EPA)
Commercial (C-1)	1,963	103	19.1
Commercial-Downtown (C-1-D)	1,201	13	92.4
Employment (E-1)	1,932	114	16.9
Croman Mill (NC, MU, OE, CI)	153	2	76.5
Industrial (M-1)	142	13	10.9
Total	5,391	245	22.0

Source: Jackson County Assessor, 2024; City of Ashland, 2025; ESRI Business Analyst, 2025; CAI, 2025.

Note: 500 employees for the Oregon Shakespeare Festival, though technically based in Downtown Ashland, are in fact distributed and were removed from local employment totals.

Note: For additional reference, a 2023 report by Johnson Economics estimated an average employment density of 18 employees per acre (EPA) for the Croman Mill site with its projected mix of retail, office, industrial, and residential. The nearby Jackson County city of Medford was found to have an existing industrial employment density of 9.3 EPA across a much larger sampling of sites.

For **aggregate land demand**, 20-year employment growth (2025-2045) by generalized land use category (commercial and industrial) was converted using locally derived employment densities for generalized Commercial and Industrial use categories (**Exhibit 53**). Total aggregate land demand based upon this method was **76 acres** (net of any additional required acreage for ROWs, public facilities, etc.), including **70 acres of commercial** land and **5 acres of industrial** land.

Exhibit 53. Aggregate Land Demand Forecast, Ashland, 2045

Generalized Land Use	20 Year Growth	Employment Density (EPA)	Net Land Demand (Ac)
Commercial	1,343	19.1	70
Industrial	59	10.9	5
Total	1,401	-	76

Source: Jackson County Assessor, 2024; City of Ashland, 2025; ESRI Business Analyst, 2025; CAI, 2025.

Employment Lands Sufficiency

With a **total net buildable supply of 181 acres** of “employment lands”, and only **76 aggregate acres of demand** projected for industrial and

commercial uses, Ashland has a likely **surplus of over 100 acres** within the City and UGB urbanized area.

But does Ashland have the right kind of sites? The following section examines **supply versus demand by category** more closely and **characterizes needed site types** in Ashland based on existing and historic patterns of land absorption.

Land Needed for Economic Growth

Exhibit 54 models one potential distribution of land demand given existing shares of current employment by land use / zoning category as applied to employment growth for the 20-year planning period (forecast at 1,401 new jobs by 2045). Croman Mill is likely significantly underestimated given assumptions based on current employment as the site has largely not yet been redeveloped.

Discounting Croman Mill, which is likely to see much greater future development, there could be a small deficit of commercial lands but surpluses of employment and industrial lands in Ashland currently. Since the E-1 category can accommodate many commercial uses, it is possible that the city of Ashland has sufficient supply to meet demand in all categories, possibly excepting Downtown Commercial.

Exhibit 54. Estimated Demand for Employment Land by Land Use Type, Ashland, 2025-2045

Comp Plan Category	Supply	Demand			Estimated Demand (Ac)	Surplus (Deficit)
	Net Buildable Acres	Current Employment (% of Total)	Share of 20-Year Job Growth	Employment Density (EPA)		
Commercial	15.2	22.7%	318	19.1	16.7	(1.5)
Downtown (Commercial)	0.44	13.9%	195	92.4	2.1	(1.7)
Employment	90	22.4%	313	16.9	18.5	71.5
Croman Mill (Employment, Ind. & MU)	61.1	1.8%	25	76.5	0.3	60.8
Industrial	14.6	1.6%	23	10.9	2.1	12.5
Total	181.3	62%	874		39.7	141.6

Sources: Jackson County Assessor, 2024; City of Ashland, 2025; ESRI Business Analyst, 2025; CAI, 2025.

Note: Current employment totals do not sum to 100% because 38% of Ashland employment occurs outside of these zones, mainly on residential lands.

Land Sufficiency by Site Types

Exhibit 55 summarizes the number of vacant sites by size that are available for new development on employment lands in Ashland in 2025. In total, there

are 140 sites available to support future land demand through 2045. The largest grouping of these are small sites of less than 0.5 acres (56). The next largest grouping are sites sized 1-5 acres. Few sites are larger than 5 acres (8) and even fewer are needed at the 20 acres or larger range (2). The largest proportion of sites is in the Employment land use category (89) with the next largest categories being commercial (24) and Croman Mill (13). These findings inform the following discussion of demand by category.

Exhibit 55. Land Supply by Site Size and Designation, Ashland, 2025

Comp Plan Category	Number of Vacant Tax Lots					Total
	Less than .5 ac	.5 to 1 ac	1-5 ac	5-20 ac	More than 20 ac	
Commercial	13	5	5	1	0	24
Downtown (Commercial)	5	3	0	0	0	8
Employment	37	13	35	3	1	89
Croman Mill (Employment, Ind. & MU)	1	2	5	4	1	13
Industrial	0	0	6	0	0	6
Total	56	23	51	8	2	140

Source(s): City of Ashland, 2025; Jackson County Assessor, 2024; CAI, 2025.

Commercial Zone

Site Statistics

- Number of Developed Parcels: **178**
- Mean (Average) Parcel Size: **0.58 acres**
- Median (Most Frequent) Parcel Size: **0.23 acres**

Ashland’s **Retail Commercial (C-1)** zone allows for a range of retail, food & beverage, and service uses, while generally speaking, manufacturing and industrial uses are not permitted unless they are small and contiguous to retailing. Mini-storage is not permitted. Office is permitted in commercial, employment, and industrial zones.

Three primary nodes of this zone encompass the area immediately surrounding Downtown Ashland, the highway commercial along Siskiyou / 99, and the larger format retail node around I-5 and Ashland / 66.

Ashland’s Retail Commercial (C-1) zone currently has a median (most frequent) developed site size of 0.23 acres. If current patterns of land consumption persist, this category will require around 17 aggregate acres of land, distributed across a range of site sizes, but predominantly small (less than 0.5 acre) size sites, which constitute 54% of all currently buildable Commercial sites.

Downtown Commercial Zone

Site Statistics

- Number of Developed Parcels: **77**
- Mean (Average) Parcel Size: **0.16 acres**
- Median (Most Frequent) Parcel Size: **0.12 acres**

Ashland's **Downtown Commercial (C-1-D)** zone aims to create a vibrant, pedestrian-friendly environment by permitting a mix of uses, including high-density housing, civic offices, and small-scale commercial, food and beverage, and retail businesses. It emphasizes mixed-use developments and encourages locally oriented professional and personal services. The zone is designed to foster a compact, transit-oriented area with public spaces, extensive landscaping, and shared parking.

This zone is the location of many of Ashland's Oregon Shakespeare Festival organizations (including the HQ of the festival itself) and supporting businesses and encompasses a compact zone in downtown Ashland.

Ashland's **Downtown Commercial (C-1-D)** zone currently has a median (most frequent) developed site size of 0.12 acres. If current patterns of land consumption generally continue, this category would require only around 2 more aggregate acres of land (given extremely small lot sizes and higher built FARs), distributed across a range of small site sizes, but predominantly less than 0.5 acre size sites, which constitute two-thirds of the eight currently buildable Downtown Commercial sites.

Employment Zone

Site Statistics

- Number of Developed Parcels: **214**
- Mean (Average) Parcel Size: **0.53 acres**
- Median (Most Frequent) Parcel Size: **0.26 acres**

Ashland's **Employment (E-1)** zone is designated to allow for various types of businesses, including office, retail, and manufacturing, while aiming for a visually appealing and minimally disruptive environment. Large nodes of E-1 exist along the railroad right-of-way (ROW) north of downtown, and south of the airport.

The **Employment category (E-1) is more inclusive** as it allows many commercial uses, in addition to office and some (lower impact) manufacturing and industrial uses. As such, the *E-1 zone could feasibly absorb demand for both commercial and industrial land.*

In E-1, retail is limited to 20,000 square feet (sf) per lot. Mini-storage is conditionally permitted. Marijuana retailing is conditionally permitted and limited to C-1 or E-1. Auto service and gas stations are permitted with conditions in C-1 and E-1.

Ashland's **Employment (E-1)** zone currently has a median (most frequent) developed site size of 0.26 acres and an average size of 0.53 acres. If current patterns of land consumption continue, this category will demand around 19 aggregate acres of land, distributed across a range of site sizes, but predominantly small and small-mid-size sites, which constitute 42% and 15% of currently buildable Employment sites.

Industrial Zone

Site Statistics

- Number of Developed Parcels: **8**
- Mean (Average) Parcel Size: **1.6 acres**
- Median (Most Frequent) Parcel Size: **1.6 acres**

Ashland has several industrial zoned areas and business parks designed to encourage business development. These areas offer a mix of infrastructure, zoning options, and potential for various industrial and commercial uses. Specifically, the Croman Mill Site, the Ashland Industrial Park, and IPCO Commercial Properties are key locations for industrial activity.

The **Industrial zone (M-1)** in Ashland allows for a range of general manufacturing, distribution, office and industrial uses, well-buffered from residential uses. Mini-storage is a permitted use here. Retail is limited to serving workers in the zone but restaurants are permitted.

Ashland's **Industrial (M-1)** zone currently has a median (most frequent) and average developed site size of 1.6 acres. If current patterns of land consumption continue, this category will demand around 2 more aggregate acres of land, most likely in the mid-size (1-5 ac) range, which constitute 100% of the currently buildable Industrial sites.

Summary of Findings

- This analysis finds that, with a **total net buildable supply of 181 acres** of "employment lands" and only **76 total acres of demand** projected for industrial and commercial uses, Ashland has a likely **surplus of over 100 acres** within the City and UGB urbanized area.
- However, **there may be a shortage of small, centrally located commercial sites**. While overall supply is sufficient, further analysis suggests a relative lack of small Downtown Commercial and mid-sized commercial sites. Some of this demand could be absorbed by surplus

E-1 employment lands; however, businesses that depend on visibility and foot traffic—such as those tied to the Oregon Shakespeare Festival—will continue to prefer prominent downtown locations. Improving pedestrian connectivity, signage, and branding between downtown and the northern E-1 node may help support business attraction in those areas.

- **Ownership dynamics may limit redevelopment of key opportunity sites.** The Croman Mill and Railroad District properties represent the city’s largest groupings of buildable land, but lack of proactive ownership and incentives to sell have historically stalled redevelopment efforts.
- **There is capacity to accommodate stronger-than-forecasted employment growth.** If employment growth is greater than forecasts indicate in coming years, there will likely be sufficient land in Ashland to accommodate it given the surplus employment land supply identified within the City / UGB. In particular, certain segments within industrial – such as outdoor recreation manufacturing or craft food and beverage – may be worth consideration for targeted economic development efforts by Ashland to synergize with its evolving economic base.

COMMUNITY ECONOMIC DEVELOPMENT PRIORITIES

Public Engagement

Following an inclusive engagement plan, reviewed by Ashland’s Committee for Community Involvement, this project conducted several forms of engagement designed to speak directly with a diverse audience of stakeholders in Ashland and solicit insights into fundamental dynamics underlying the Ashland economy. These activities included interviews, focus groups, forums, a regional business and resident survey, and review of other engagement materials provided by the City of Ashland. This engagement summary reviews the findings identified through these activities.

Key Engagement Findings

Outreach Overview & Demographics

- Overall, the public survey received 472 responses from residents and businesses owners throughout Jackson County. 174 respondents live in Ashland, 125 work in Ashland, and 79 own or manage a business in Ashland. (Survey)
- The majority (67%) of Ashland respondents are over the age of 45, compared to 54% of total respondents. Only 4% of Ashland’s respondents were 25 or younger. (Survey)
- 88% of respondents speak English only at home, while the remaining 12% speak some combination of English, Spanish, Mandarin and/or Russian. (Survey)
- 87% of respondents who identified as Ashland residents are permanent residents, while the rest have temporary housing, move often, or do not have stable housing in Ashland. (Survey)
- Of the 146 total businesses surveyed, 97 (66%) of them are small businesses with 4 or less employees. Of Ashland’s businesses respondents (83), a similar majority (51 respondents, or 61% of Ashland’s business respondents) also identified as small businesses (with 4 employees or less). (Survey)
- Just over half (52%) of Ashland’s businesses represented in the survey have been in operation for over ten years. (Survey)
- 45% of Ashland business survey respondents report that their employees work full-time, 41% part-time and 14% seasonally. (Survey)
- The most common descriptors of the Ashland businesses surveyed were locally owned (91%), women-owned (48%), and family-owned (47%). (Survey)
- Interviews and focus groups included a diverse pool of stakeholders in Ashland, including City Councilors and Planning Commissioners, developers and property owners, major employers, the development

community, SOU students, and local business owners and residents. (Interviews)

Tourism and Economic Vitality

- Tourism is identified by Ashland survey respondents, and by interviewees, as Ashland’s greatest economic asset (with an average rank of 4.0 out of 15), along with the Rogue Valley airport (4.4), Recreational Amenities (4.9), and Southern Oregon University (5.7). Tourism was also ranked highly in open-ended survey questions, with residents citing the Oregon Shakespeare Festival (OSF) and outdoor recreation as popular attractions. (Survey, Interviews)
- While survey respondents believe in the strength of Ashland’s arts and tourism offerings, they hope for less focus to be paid to tourism and instead hope investment goes into lowering cost of living and supporting small businesses for year-round stability. (Survey)
- Both survey respondents and interviewed stakeholders believe tourism has a place in Ashland’s economic future, but that more work needs to be done to diversify the tourism industry and create an economy that supports Ashland locals – in terms of livability and wages as well as service offerings. (Survey, Interviews)
- Ashland stakeholders are actively working to expand and refine a marketing approach which moves beyond the Oregon Shakespeare Festival to promote the city as a year-round destination that leverages its natural beauty, events, and quality of life. Stakeholders highlighted efforts to brand Ashland as a basecamp for Southern Oregon tourism, and one idea gaining traction is the concept of “Storytown USA,” which aims to build on the city’s narrative and cultural assets. This effort also includes expanding year-round events, targeting families and younger audiences, and promoting outdoor recreation and other cultural assets. (Interviews)
- Post-COVID changes in tourism also includes a shift to younger, outdoors focused visitors and away from traditional cultural institutions like the Oregon Shakespeare Festival. (Interviews)
- Wildfire smoke, rising costs, and housing availability continue to pose significant threats to tourism viability and workforce stability. (Interviews)

Business Priorities

- There was strong consensus that Ashland must diversify its economy beyond tourism by supporting small-scale manufacturing, remote work, and creative industries. Stakeholders highlighted the need to leverage regional partnerships, underutilized infrastructure like AFN, and redevelopment sites such as Croman Mill to attract a broader mix of employers and improve economic resilience. (Interviews, Survey)

- Almost half (49%) of Ashland businesses respondents to the survey have plans to expand to additional locations, while 29% have no expansion plans, and 12% plan to expand their current location. (Survey)
- When Ashland business owners were asked in the survey to rank business challenges in order of importance, business owners, on average, ranked inflation, qualified employees, increased labor cost and unaffordable rents highest. (Survey)
- When asked about workforce challenges, Ashland’s business owner survey respondents largely cited talent pool offerings (35%), wage expectations (32%) and skills gaps (28%) as primary employment discrepancies. (Survey)
- Ashland’s survey respondents who are employers mentioned inflation (48%), real estate costs (32%) and labor costs (32%) as economic factors with the most significant impacts on their business. (Survey)
- When asked about Ashland’s economy of the future, Ashland survey respondents describe support for local businesses and arts (29% of responses), a diversified economy (24%), and a lower cost of living (28%). (Survey)

Housing Affordability and Workforce

- Ashland’s quality of life is a compelling draw for remote workers, entrepreneurs, and leadership talent; however, high housing costs, elevated development expenses, and a perceived resistance to growth limit the city’s ability to attract and retain businesses. (Interviews)
- These same housing challenges affect workforce recruitment, prompting many employees to live in neighboring communities, forcing Ashland-based businesses to offer higher wages to offset commuting burdens. (Interviews)
- High housing costs, and lack of housing stock in Ashland was identified by stakeholders as a major barrier to attracting and retaining younger residents, SOU graduates, and essential workers, especially in healthcare, education, and service sectors. (Interviews)
- Workers state that Ashland is not perceived as accessible to families or moderate-income earners and that this effect is felt across many areas, such as school enrollment and neighborhood services. Similarly, when asked about barriers to equal access for economic opportunity in Ashland, 42% of survey responses cite cost of living and 21% of responses cite a lack of employers and opportunity. (Interviews, Survey)
- When prioritizing investments for economic development, Ashland survey respondents ranked jobs with livable wages and upward mobility as the top priority (receiving an average score of 8.1 out of the

possible 11, in which a higher number indicated higher priority), followed by small business support (7.7). (Survey)

- Major employers recommended increasing alignment between local institutions and industry to build workforce pipelines and support economic mobility. (Interviews)
- Ashland’s AFN fiber-optic infrastructure was highlighted as a powerful but underutilized asset to support remote work and entrepreneurship in the tech sector. (Interviews)

Community Development and Future Growth

- Stakeholders broadly called for greater regional collaboration to leverage Ashland’s unique cultural, educational, and natural assets as part of a cohesive Southern Oregon strategy. (Interviews)
- Stakeholders emphasized the importance of balancing Ashland’s unique identity with the need for innovation and growth. Future development should honor Ashland’s identity and support values expressed by the community. (Interviews)
- Ashland is widely perceived as a difficult place to develop, largely due to historic barriers such as unreliable permitting, high fees, and restrictive land use policies. While some stakeholders noted recent improvements, the city’s historical reputation for regulatory hurdles and community resistance continues to deter investment, especially compared to more flexible neighboring cities. (Interviews)
- About half (53%) of Ashland survey respondents believe the local government to be “somewhat supportive” in helping businesses thrive, while 32% believe it is “not supportive” and 15% believe it is “very supportive”. (Survey)
- Stakeholders envision a more vibrant, accessible, and visually cohesive downtown, but note the need for infrastructure investment and long-term planning. (Interviews)
- When asked if there was a different city Ashland might take lessons from, Ashland survey respondents cited locations across the globe including Boulder, Colorado (5 mentions) and Davis, California (5 mentions). However, over half of responses described other cities in Oregon, with 27 (about 30% of all mentions) listing Bend, Oregon as a city Ashland should work to emulate. (Survey)

SOU and Student Feedback

- Similar to other groups, students feel affordability in Ashland is a great barrier to their staying and succeeding in the community post-graduation. (Student Forum)
- Students value Ashland’s walkability and natural beauty, but find entertainment and retail options limited—especially for those without cars or under 21. (Student Forum)

- Students desire a greater connection to the city of Ashland (and the region) through improved public transportation, expanded attractions, and inclusive, affordable events and activities that cater to younger, sober, and under-21 audiences. (Student Forum)
- The lack of high paying jobs and career development opportunities further discourage SOU students from envisioning careers in Ashland. (Student Forum)

STRATEGIC THEMES AND IMPLICATIONS FOR POLICY

Strengths, Weaknesses, Opportunities, Threats (SWOT) Analysis

This SWOT analysis assesses Ashland’s internal strengths and weaknesses, as well as external opportunities and threats. This list has been informed through data analysis completed as part of this EOA and further vetted and augmented through engagement with Ashland’s stakeholders and community, and, finally, is supplemented by recent planning work surrounding Ashland economy including the 2022 Ashland Chamber of Commerce’s Economic Diversification Study and Ashland’s 2023 Housing Production Strategy.

Strengths

Strengths highlight internal advantages and positive attributes that contribute to Ashland’s economic success.

- **High Quality of Life** – Natural beauty, walkability, safety, and strong cultural identity attract visitors, remote workers, and established professionals.
- **Vibrant Arts and Tourism Brand** – The Oregon Shakespeare Festival, Cabaret Theatre, First Friday, and other arts/cultural assets position Ashland as a unique regional destination.
- **Educated, Engaged Community** – A highly educated resident base with strong civic pride and community involvement.
- **Strong Institutions** – Presence of SOU, high-performing public schools, and community-oriented organizations like Ashland’s Chamber and Travel Ashland.
- **Fiber-Optic Infrastructure (AFN)** – Advanced internet infrastructure provides a solid base for remote work and digital entrepreneurship.
- **Distinctive Small-Town Character** – Ashland’s historic charm and walkable downtown create a welcoming and vibrant atmosphere for residents, businesses, and visitors.

- **Strategic Interstate Access** – Location along Interstate-5 offers regional connectivity and logistical advantages for businesses, visitors, and talent movement.
- **Abundant Outdoor Recreation** – A well-loved park system, access to Bear Creek, mountain biking and ski trails, and nearby vineyards enhance quality of life and attract tourism and recreation-driven business.
- **A Niche Manufacturing Sector** – Local firms in medical devices, agricultural products, and green technology provide a foundation for light industry and economic diversification.
- **Publicly Owned Land Offers Additional Development Potential** – While not included in the formal buildable lands inventory, city- and SOU-owned properties present valuable opportunities for strategic development, partnerships, and community-serving projects.

Weaknesses

Weaknesses identifies internal challenges or limitations that hinder Ashland’s economic progress.

- **High Cost of Living and Limited Housing Options** – Housing affordability limits workforce attraction and retention, student stay rates, and business growth.
- **Perceived Difficulty in Development** – Perceptions of regulatory complexity, high fees, and limited available land deter business expansion and investment in Ashland.
- **Over-Reliance on Tourism** – Seasonal fluctuations and vulnerability to external shocks (e.g., wildfire smoke, pandemics) threaten economic stability.
- **Weak Talent Retention Pipeline** – Disconnect between SOU, Ashland’s school district, and local employers reduces youth retention and career pathway development.
- **Fragmented Economic Coordination** – Efforts across sectors and institutions are often siloed, making regional and intra-city collaboration harder to sustain.
- **Limited Investment in Infrastructure and Downtown Revitalization** – A lack of recent development and public or private reinvestment in the downtown core and key infrastructure assets may weaken Ashland’s economic competitiveness and long-term vitality.
- **Insufficient Childcare Availability** – A shortage of affordable, accessible childcare options creates barriers to workforce participation and family retention.
- **Lack of Diversity in Ashland’s Community** – Ashland’s high cost of living contribute to limited racial, economic, and age diversity in the

city's population. Without housing and job options for younger residents, Ashland risks demographic and economic stagnation.

- **Cultural Resistance to Growth** – Some opposition among locals to new development, including housing and commercial uses, constrains progress and deepens barriers to affordability and economic renewal.
- **Declining School Enrollment** – Shrinking student populations are reducing funding and limiting the school district's ability to maintain robust academic and extracurricular offerings.
- **Limited Availability of Small and Mid-Sized Commercial Sites** – While some demand may be absorbed by surplus Employment (E-1) lands, there is a shortage of centrally located, smaller-scale commercial spaces with strong visibility and foot traffic—particularly for businesses serving the tourism and cultural sectors who might need a space in downtown.
- **Inactive Ownership of Key Redevelopment Sites** – The Croman Mill and Railroad properties represent Ashland's largest developable land holdings, but disengaged ownership and speculative holding patterns have stalled redevelopment and limited the city's ability to activate these strategic sites.

Opportunities

Opportunities explore external factors or trends that could be leveraged for growth or improvement in Ashland's economy.

- **Redevelop Strategic Sites** – Sites at Croman Mill, the Railroad, University District, and Downtown all have unique opportunities to develop in such a way as to add to Ashland's vibrancy.
- **Expand and Diversify Tourism Offerings** – Build on Ashland's arts and culture foundation by promoting year-round tourism through events like the Mystery and Comedy Festivals, expanded winter activities, and outdoor recreation experiences such as skiing, biking, and hiking. Strategies for Economic Diversification can also be found in Ashland's Chamber of Commerce's Economic Diversification study (2022).
- **Leverage Agritourism and Culinary Assets** – The Rogue Valley wine region, farm-to-table culture, and local food production industries offer growth opportunities in culinary tourism, food entrepreneurship, and value-added agriculture.
- **Diversify Beyond Tourism** – Encourage growth in Ashland's non-tourism sectors including education, healthcare, creative entrepreneurship, and niche manufacturing to build a more resilient local economy.
- **Grow Creative and Cultural Industries** – Support sectors that complement Ashland's identity, including film, digital arts, visual

arts, and culinary arts, to attract talent and expand economic opportunities.

- **Capitalize on Outdoor Recreation Economy** – Enhance Ashland’s brand as an outdoor destination by investing in assets like Mt. Ashland Ski Area, trail systems, and nature-based events that can draw visitors beyond peak tourist seasons.
- **Support Expansion in Health and Wellness Sectors** – Advance growth in healthcare-adjacent industries, such as senior care, functional medicine, and integrative wellness, in alignment with regional trends and demographics.
- **Deepen Regional Partnerships** – Collaborate with neighbors, including Talent, Phoenix, and Medford, and with regional partners like SOREDI, to align workforce development, transportation, and infrastructure investment.
- **Engage Younger and Diverse Populations** – Expand housing, employment, and civic opportunities for families, students, and younger professionals to foster long-term community vitality.
- **Elevate Ashland’s Brand and Marketing Reach** – Leverage Ashland’s identity to attract new residents, businesses, and investment through targeted branding and promotion focused on lifestyle, creativity, and inclusivity.
- **Attract Remote Workers and Lifestyle Migrants** – Position Ashland as a high-quality living destination for professionals and retirees relocating from urban areas, bringing investment, civic engagement, and economic stability.
- **Coordinate Housing and Employment Land Strategies for Mutual Benefit** – As the City continues to implement policies from the 2023 Housing Production Strategy, identify opportunities to simultaneously advance goals for commercial and employment land. Strategies such as increased residential allowances in employment zones, adaptive reuse, and tools like land banks or MUPTE can help support both housing production and vibrant, flexible mixed-use areas that contribute to Ashland’s economic vitality.
- **Enhance Connectivity Between Downtown and E-1 Employment Areas** – Improve pedestrian access, wayfinding, and branding between the downtown core and northern commercial nodes to increase customer flow and visibility for businesses located outside the traditional retail core.
- **Expand Retail Flexibility Within Employment Zones** – Reevaluate retail use caps in select E-1 areas—such as the Oak Street/Clear Creek corridor—to allow for greater integration of customer-facing businesses and support mixed commercial activity near downtown.

Threats

Threats examine external challenges or risks that could negatively impact Ashland's goals.

- **Stagnant Population Growth** – Persistently low or negative population growth limits workforce availability, school enrollment, and the long-term sustainability of city services and local institutions.
- **Impacts from Climate Change** – Wildfire risk, poor air quality, extreme heat, and declining water availability threaten public health, economic activity, outdoor-oriented quality of life, and Ashland's appeal as a destination.
- **Regional Competition** – Neighboring communities offer lower costs of living, lower costs of development, easier permitting, and more industrial space, attracting businesses and talent that Ashland could lose.
- **Competition from Peer Communities** – Other small, arts-driven cities like Bend and Santa Fe compete with Ashland for tourists, arts funding, and business investment.
- **Limited Economic Resilience** – A narrow economic base anchored in tourism and cultural institutions leaves the city vulnerable to external shocks.
- **SOU Enrollment Has Not Recovered Post-COVID** – Southern Oregon University continues to experience lower student enrollment, reducing its economic and cultural contributions to the local community.
- **Rising Housing Costs from In-Migration** – An influx in high-income residents from out-of-state can further inflate housing prices and risk displacing local families.

Strategic Themes

1. Strengthen Economic Resilience Through Diversification

Ashland's economy is heavily reliant on tourism and service sectors, leaving it vulnerable to seasonal fluctuations, wildfires, cost of living challenges, and broader economic disruptions. There is interest expanding Ashland's tourism economy to attract more visitors at different times of the year, as well as to expand the sectors which are most active in Ashland. This could include light manufacturing, tech, food production, wellness, and specialty industries—particularly those aligned with Ashland's lifestyle values and small-town character.

2. Foster an Inclusive, Forward-Looking Community

Ashland's strong sense of place and cultural identity are major assets, but there is a tension between preserving what exists and adapting to future needs. Residents recognize the need to welcome new residents, businesses, and ideas to avoid economic and social stagnation. Embracing thoughtful growth—especially that which supports families, younger residents, and diverse voices—is seen as essential to keeping Ashland vibrant and relevant for future generations.

3. Unlock the Potential of Local Talent and Institutions

There is untapped opportunity to better connect local educational institutions—particularly SOU and Ashland High School—to economic development goals. Strategies could include efforts to build career pipelines, host internships, develop networking programs, and support entrepreneurship, especially in partnership with regional organizations.

4. Make Space for Business Growth

Ashland's built environment and development patterns could act as barriers to expansion. It is important to have flexible, ready-to-develop commercial and industrial space, as well as reasonable permitting costs and consistent regulations, to support economic growth. Sites such as the Croman Mill and the railroad properties are of strategic priority.

5. Build Regional Partnerships to Scale Impact

Ashland's economic future is closely tied to the broader Southern Oregon region, and stakeholders highlighted the need for deeper collaboration with neighboring cities, SOREDI, the SBDC, and workforce partners. Stronger alignment is needed on land use planning, workforce development, business support, and infrastructure investment—particularly to access larger labor pools, grow entrepreneurship, and compete for state and federal funding.

6. Activate Ashland's Lifestyle Advantage

Ashland's greatest strengths—its natural beauty, safety, walkability, cultural amenities, and robust fiber infrastructure—are clear economic assets that position the city to attract remote workers, lifestyle-driven entrepreneurs, and talent seeking high quality of life. By strategically leveraging these assets, Ashland can better align its economic development efforts to attract the types of businesses, visitors, residents, and workers that reflect its long-term vision and values.