



Clatsop County Economic Opportunities Analysis

Technical Advisory Committee Meeting #2

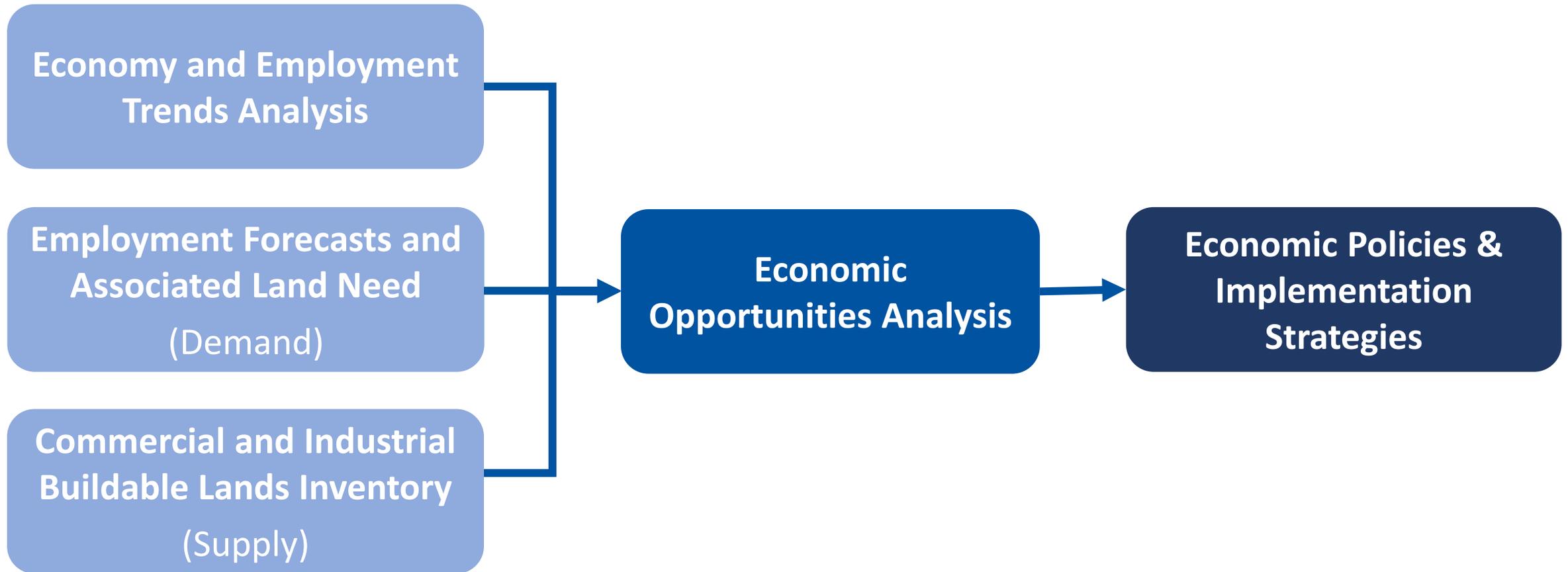
January 25, 2024, 10:00 – 12:00 AM

Agenda

- Greetings, Project Update
- Job and Industry Trends
- Goals Policies and Challenges (Discussion)
- Buildable Land Inventory – Methodology and DRAFT Findings
- Next Steps

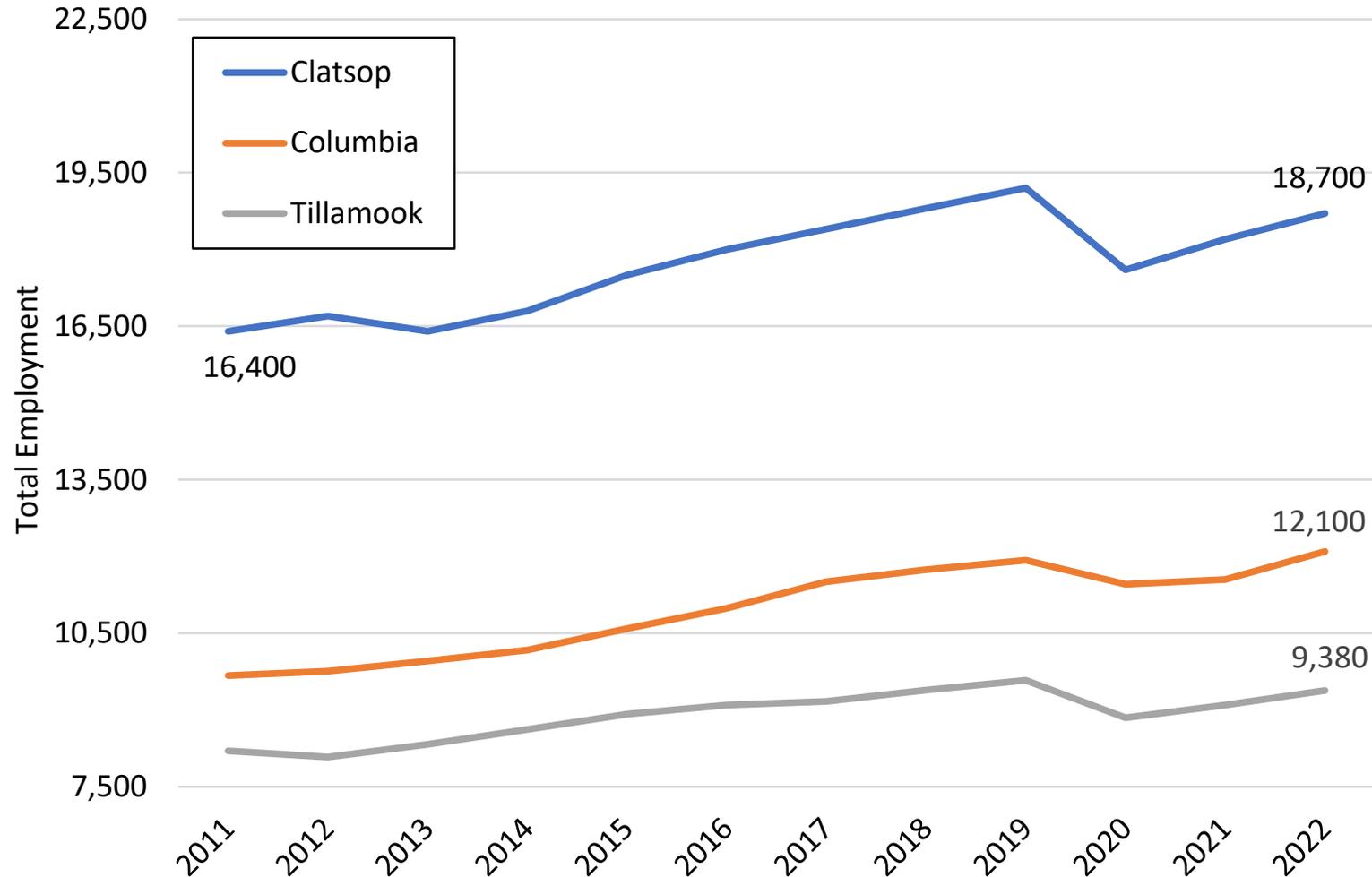


Overview of EOA Process



Jobs and Economic Trends

Estimated Total Nonfarm Employment



Clatsop County

- 10-year growth: 2,000 (12%)
- 200 jobs annually (1.1%)
- Household growth (0.9%)

COVID Impacts

- Feb. to Apr. 2020: -4,850 jobs
- 25% job loss
- Nearly recovered

Clatsop County Industries

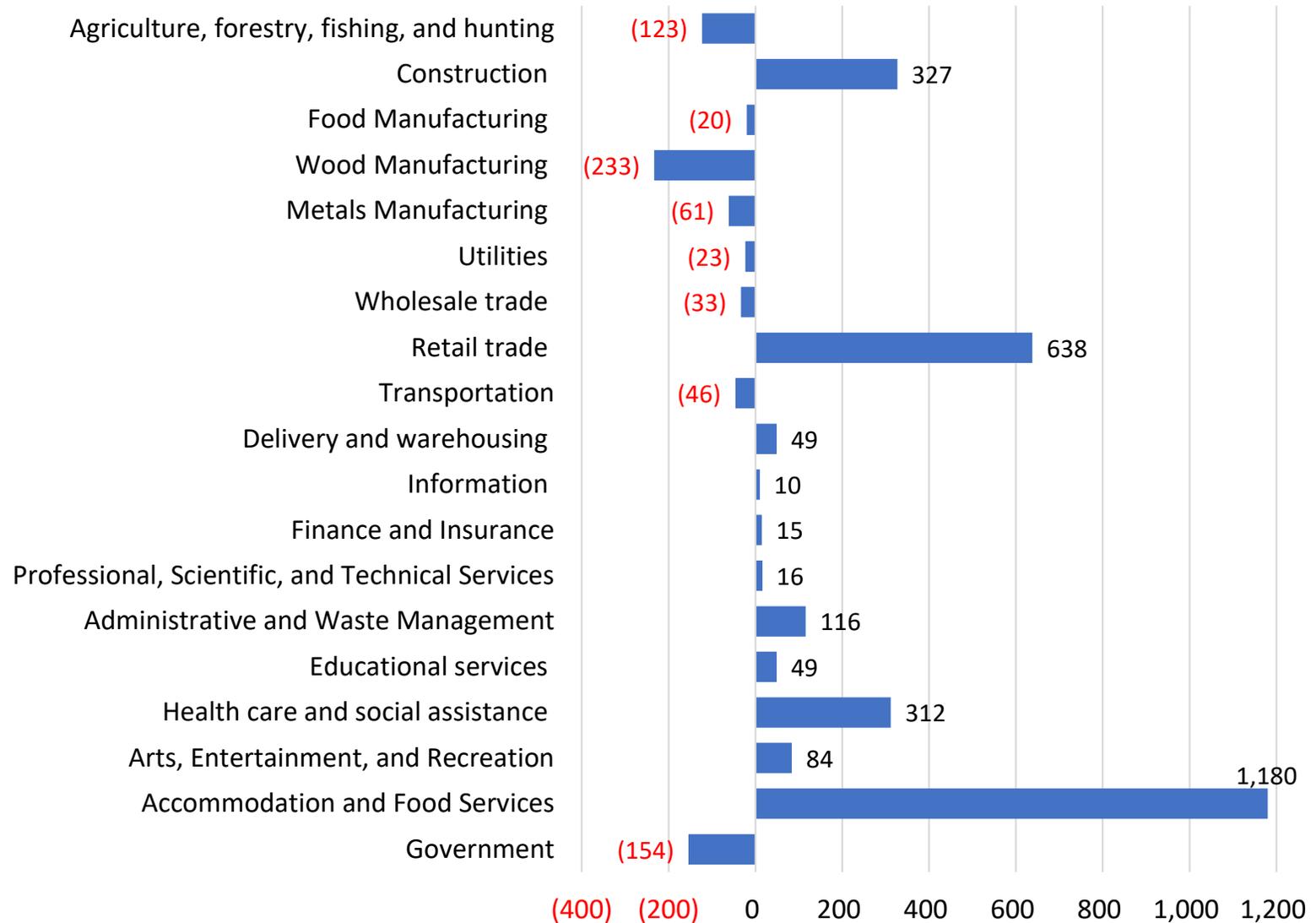
Mature Clusters

- Forestry, fishing
- Wood products
- Food processing

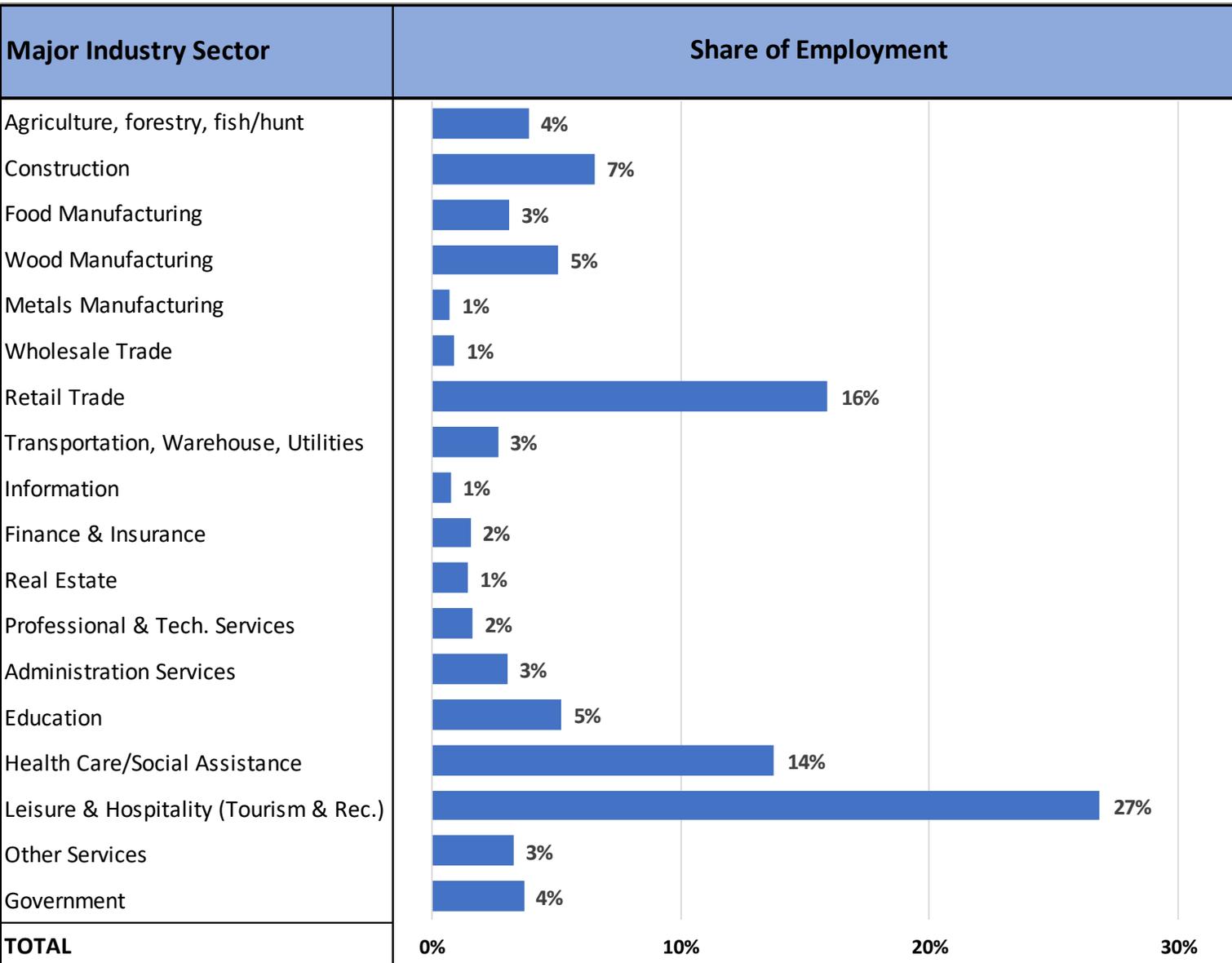
Declining Clusters

- Mining
- Metals Manuf.
- Utilities
- Government
- Wholesale Trade

Job Gains/Losses by Sector (Covered Employment)



Clatsop County Industries



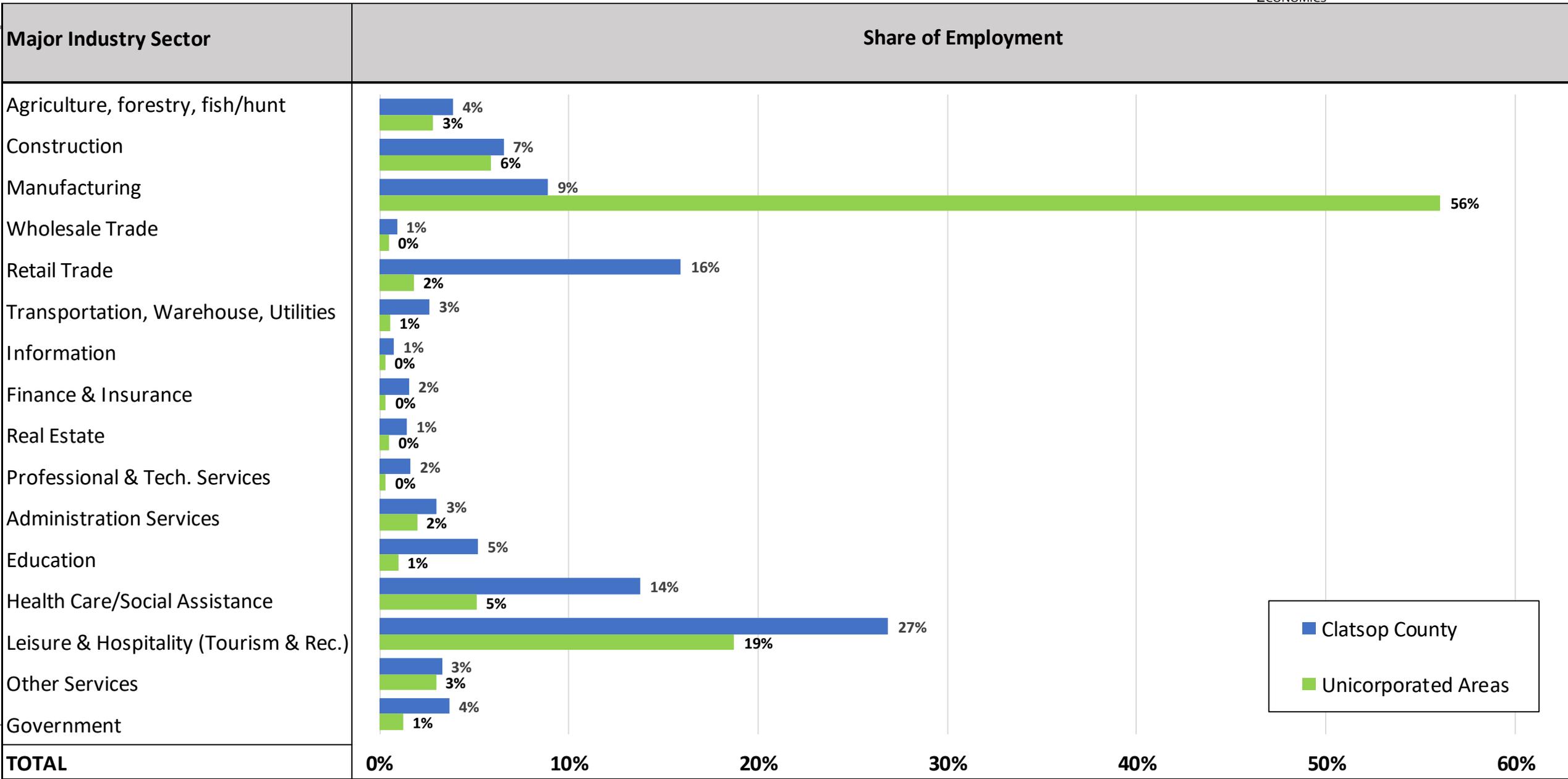
Growth Clusters

- Tourism (Hotel & Dining)
- Education Services
- Arts, Entertainment, Rec.
- Retail
- Construction

Emerging Clusters

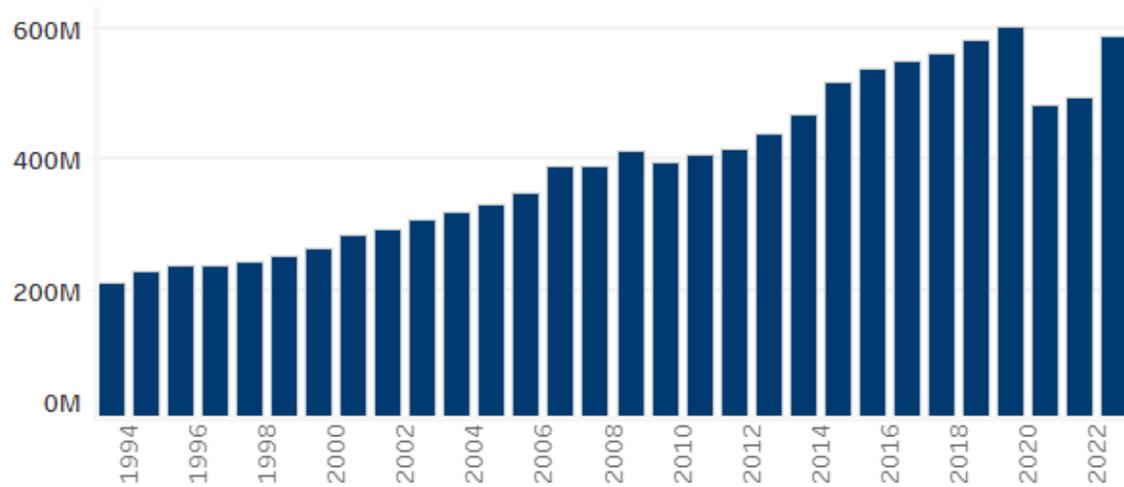
- Warehouse, Distribution
- Health Care
- Administration
- Real Estate, Prop. Mgmt.

Clatsop County & Unincorporated Industries

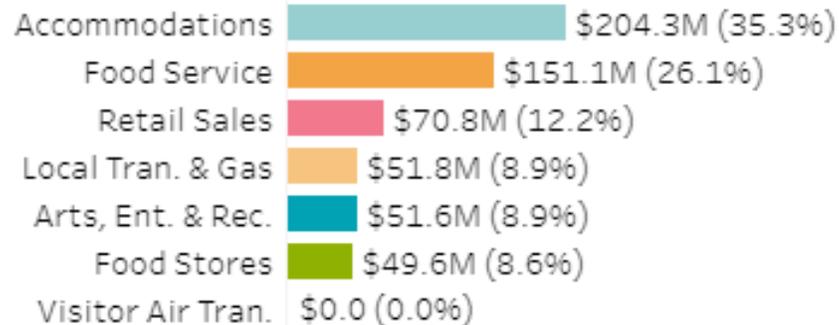


Clatsop County Tourism Statistics

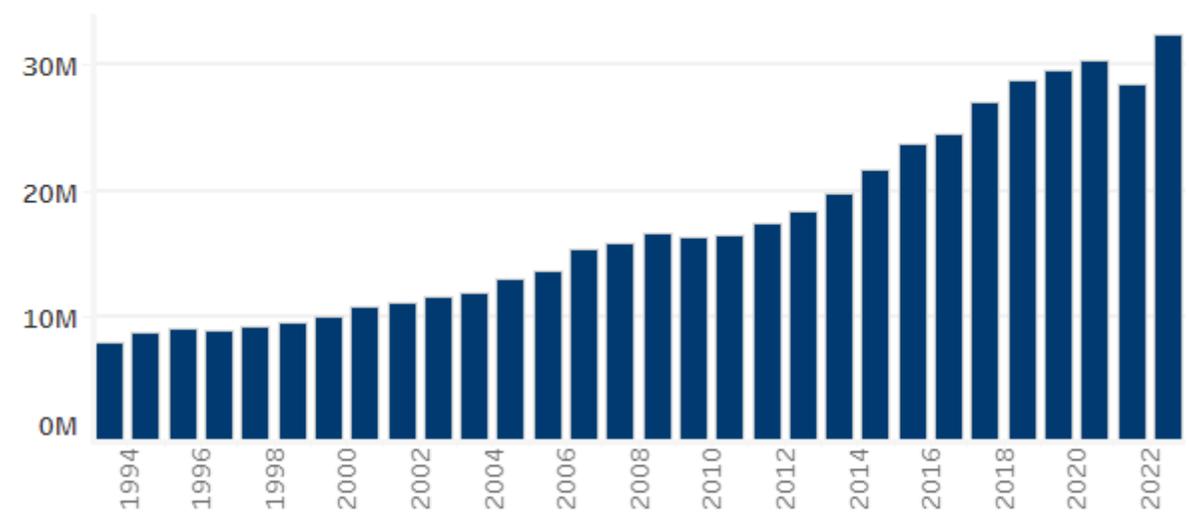
Clatsop County
Total Direct Travel Spending
All



2022 Subcategory Breakout



Clatsop County
Tax Receipts Generated by Travel Spending
All

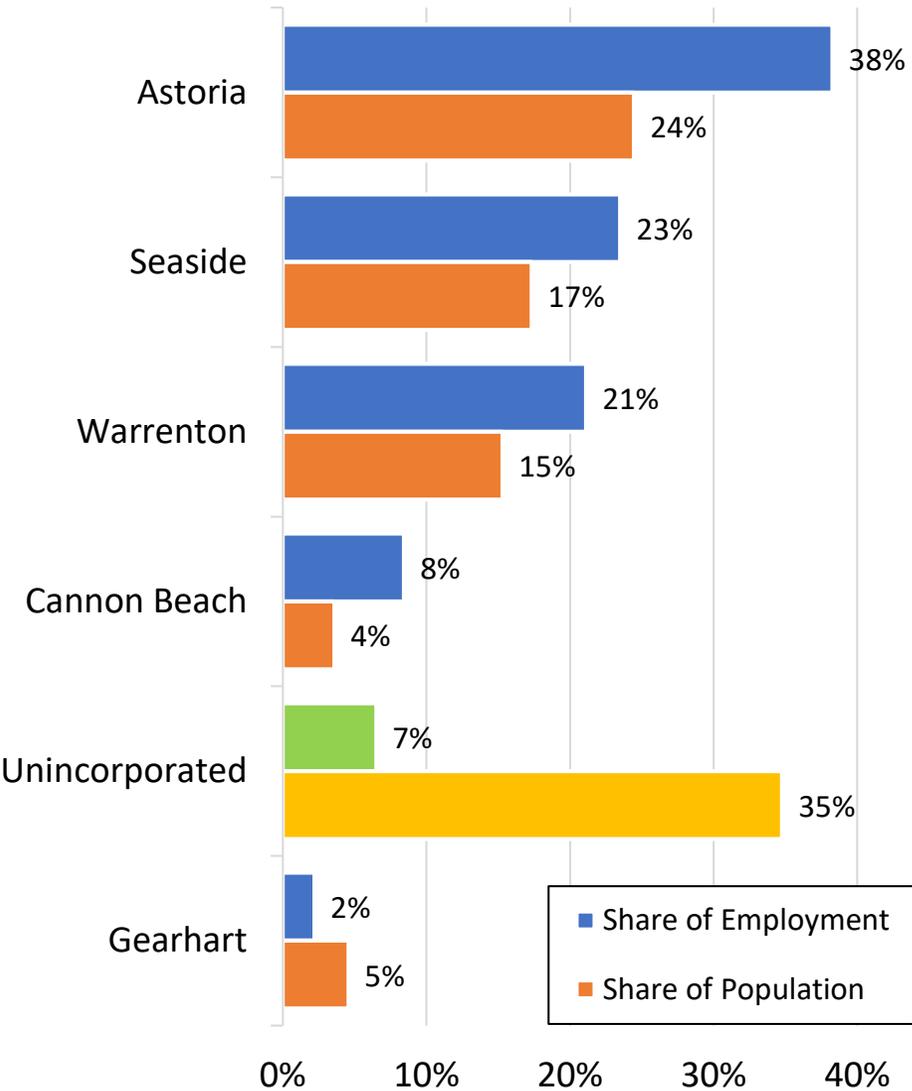


2022 Subcategory Breakout

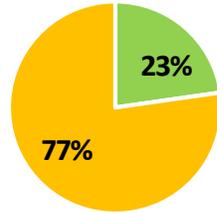


Clatsop County Employment

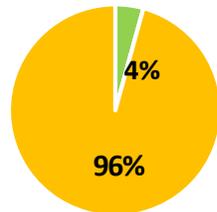
Share of County Employment vs. Population



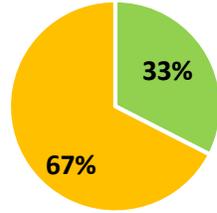
Warrenton



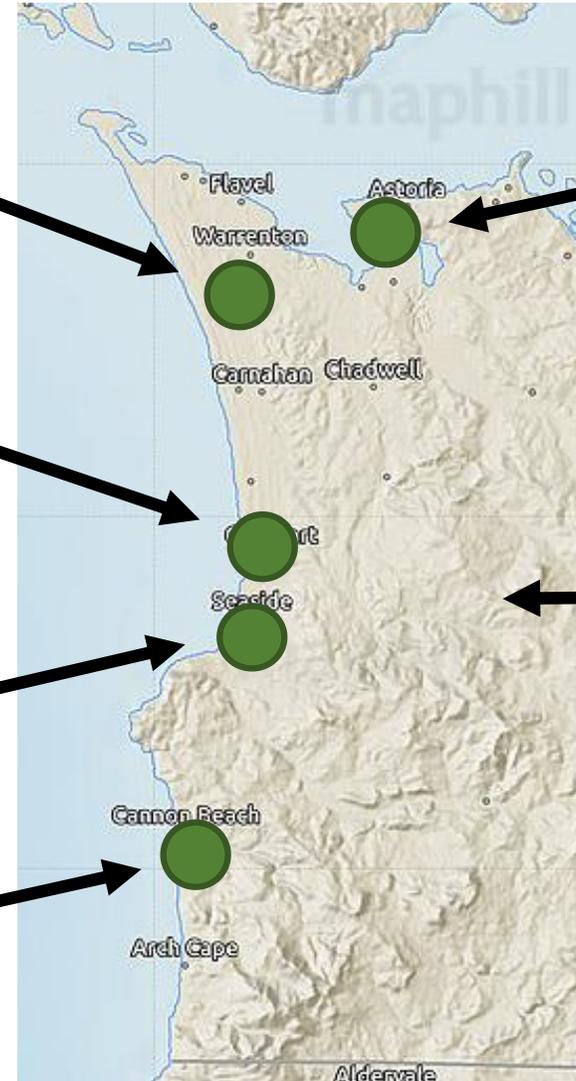
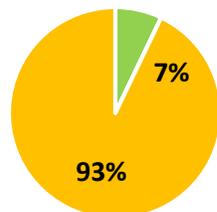
Gearhart



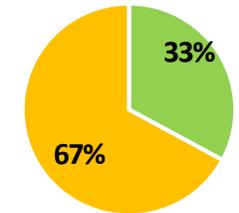
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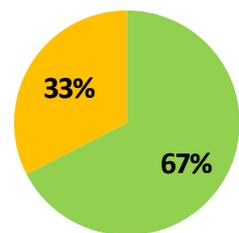
Cannon Beach



Astoria



Countywide



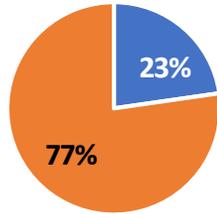
Local Jobs Held By:

In-Commuters 

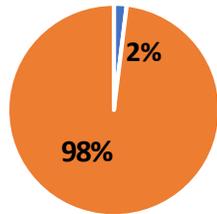
Residents 

Clatsop County Workforce

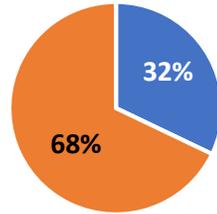
Warrenton



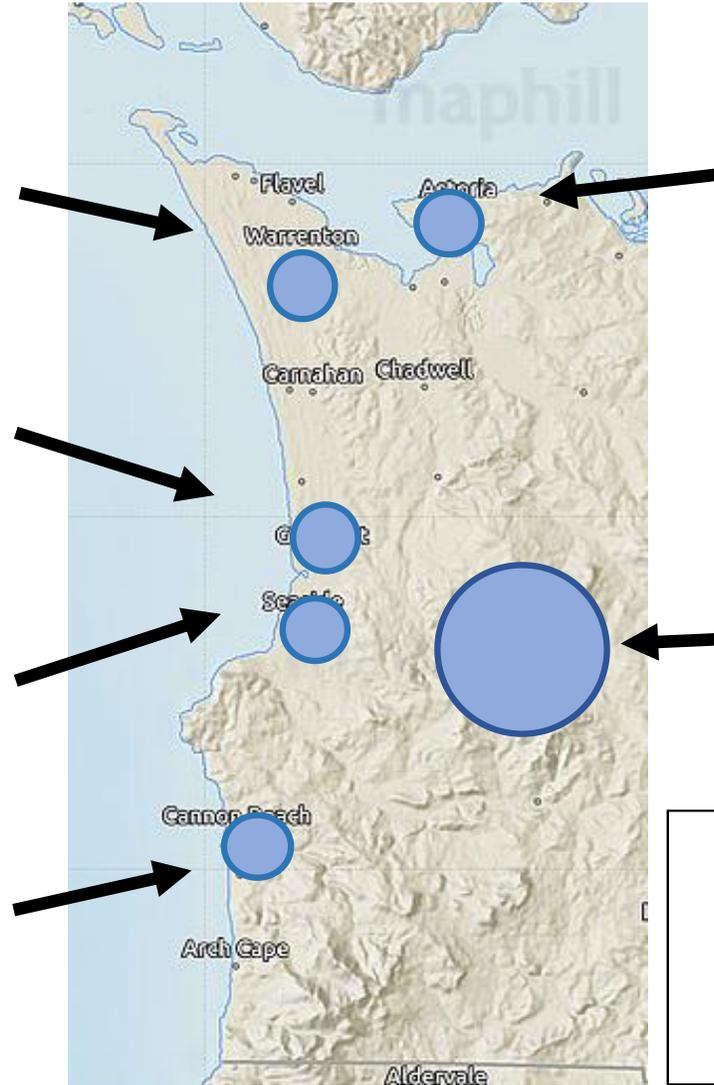
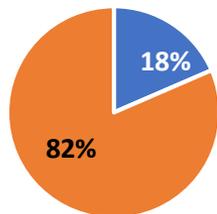
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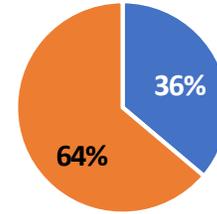
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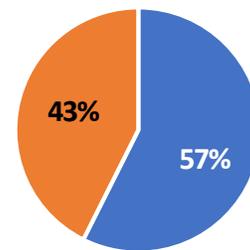
Cannon Beach



Astoria



Countywide



Residents Working:

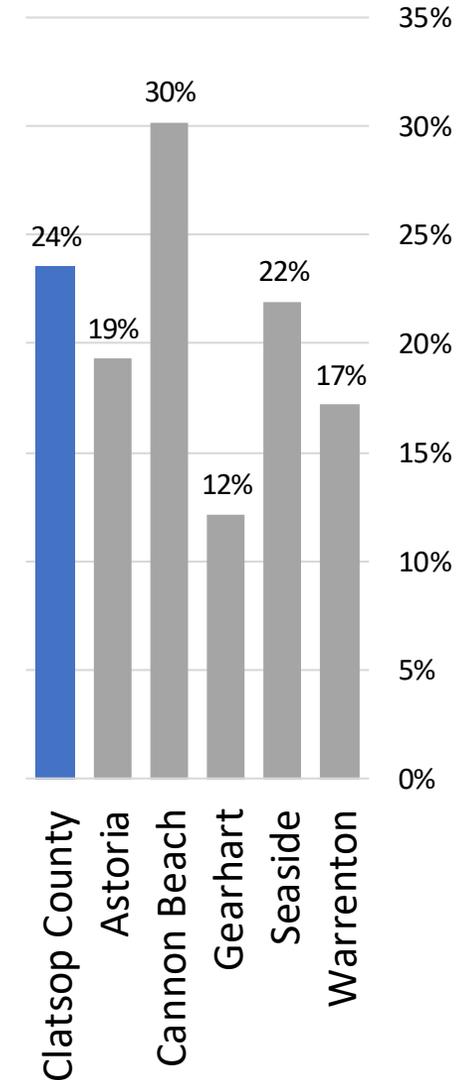
Outside City/County



Inside City/County

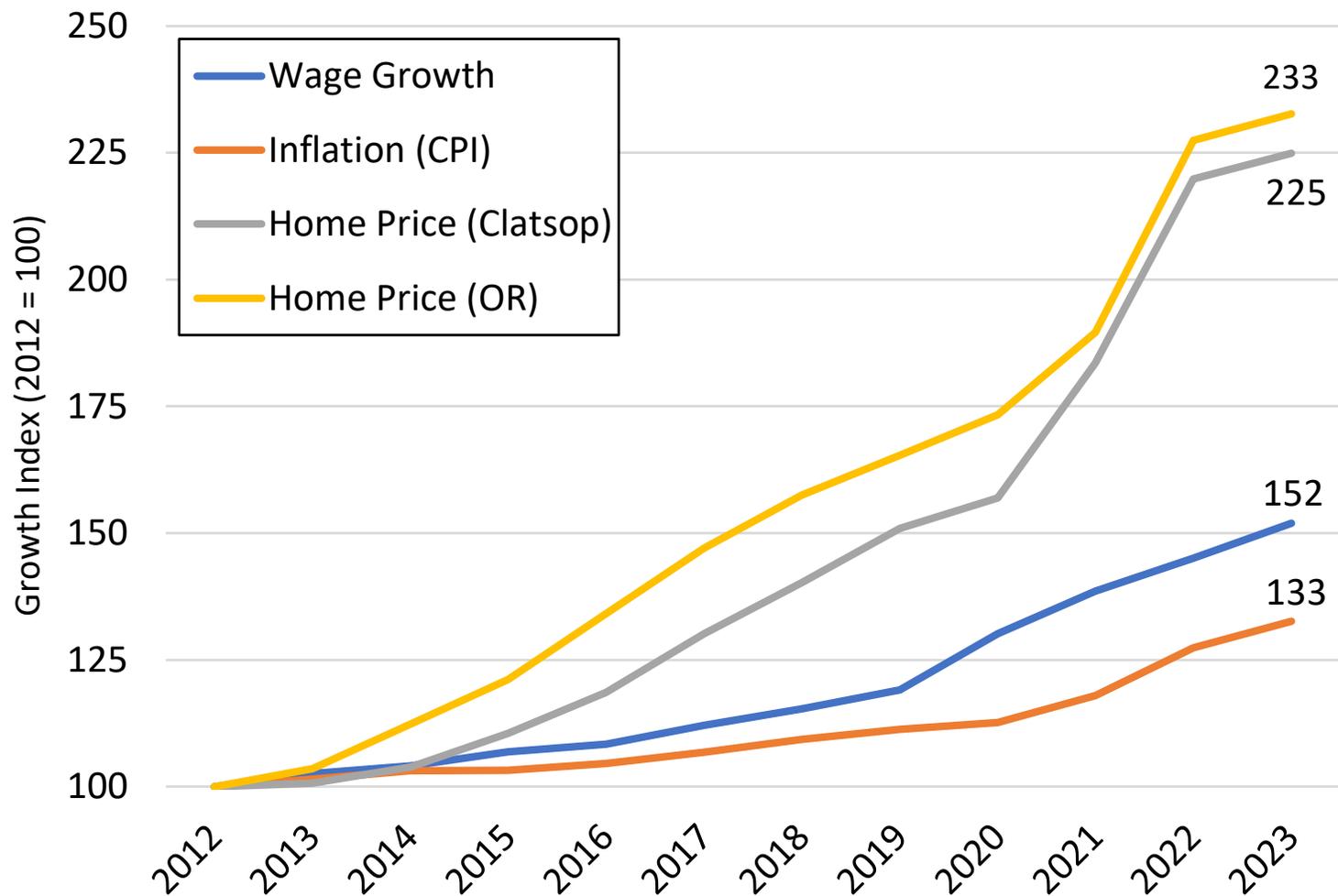


Residents Commuting 30+ Min.



Clatsop County Wages vs. Home Prices

Relative Growth: Avg. Annual Wage, Inflation, and Home Prices



Housing Costs

- Median Home Price: \$550k
- Up from \$240k in 2013
- 25% vacancy
- Short-term rentals
- Households > Hsg. Production

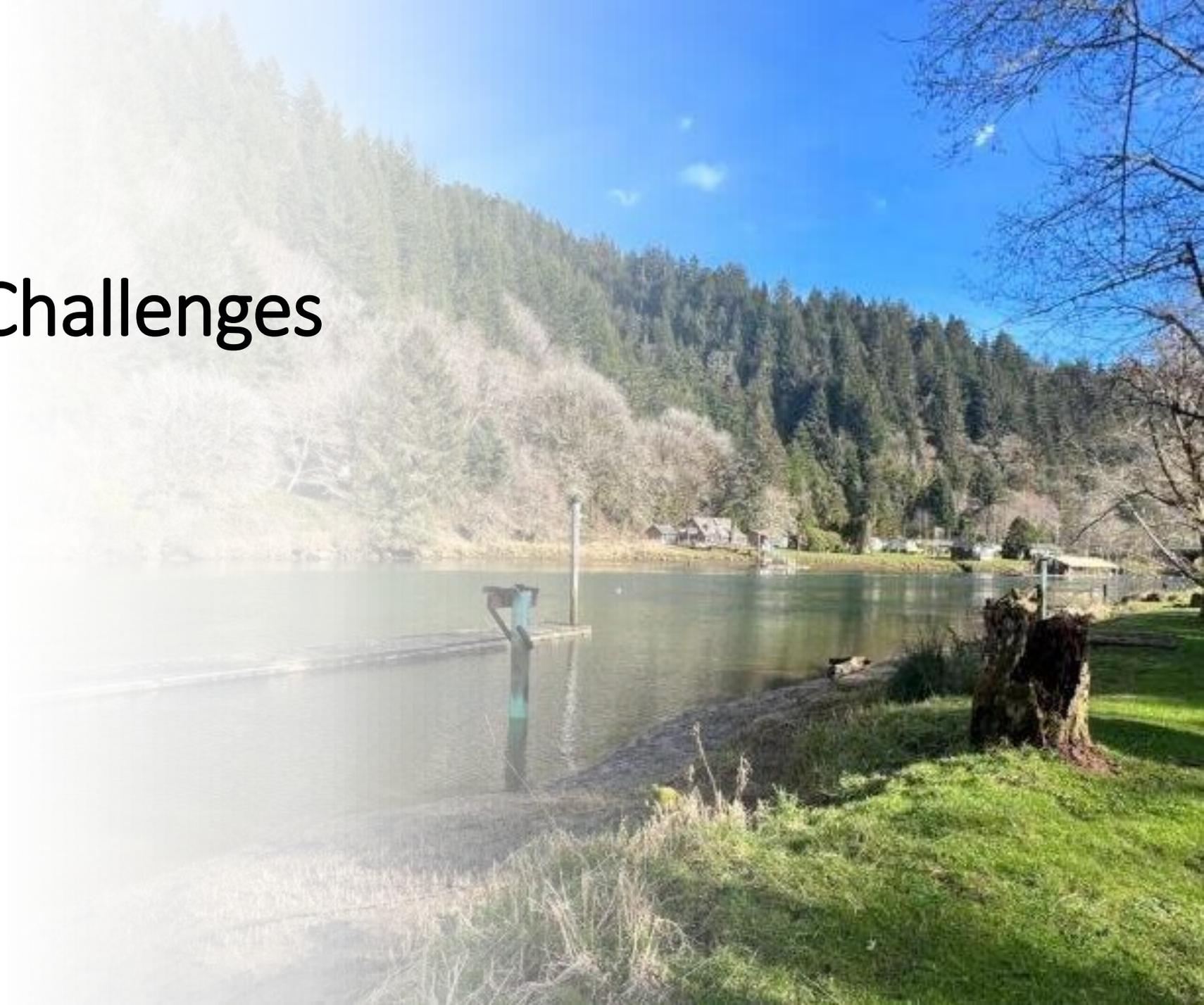
Questions or Comments?





Goals, Policies, Challenges

Discussion



Target Industries for the County

From the Comprehensive Plan

- Forestry and Wood Products (falling emp.)
- Marine Resources (seasonal)
- Seafood Processing (seasonal)
- Education Services
- Health Care
- Arts, Entertainment and Recreation
- Accommodation and Food Service (Tourism)
- Retail

Other

- Other Food Processing (Fermentation, new seafood products, specialty/craft foods)
- Remote workers, entrepreneurship
- Government (Coast Guard, Camp Rilea)
- Off-season activities, attractions
- Destination Resort?

Challenges to Economic Development

From the Comprehensive Plan

- Decline in forestry and wood products
- Seasonal nature of marine resource and processing jobs
- Dependence on natural resources
- Low pay in visitor/retail sectors
- Fragmented local economic planning
- Insufficient industrial land in rural areas
- Development pressures on resource lands
- Disproportionate high number of retirees

Other

- FEMA Oregon Implementation Plan
- OR Dept. of Forestry Habitat Conservation Plan
- Earthquake, tsunami risks, precautions
- Availability of affordable housing and childcare for workforce
- Dependence on Highways 30 and 101 (susceptible to accidents, emergencies)
- Wastewater infrastructure, DEQ requirements
- Workforce skills, education issues?

Economic Development Discussion

- What can the County do to help Cities, and vice versa?
- What levers does the County have for Economic Development?
- What is the role of unincorporated lands? How might it change?
- What industry specific needs have we not discussed?



Buildable Lands Inventory (Draft BLI)

Buildable Lands Inventory (BLI) Purpose:

- Further the County's economic development objectives.
- Identify parcels available and suitable for commercial and industrial development.

BLI scope:

- Focuses on employment lands (commercial and industrial zoning).
- Includes employment land in unincorporated Clatsop County (outside cities and their Urban Growth Boundaries (UGBs)).

Buildable Lands Inventory (Draft BLI)



JOHNSON
ECONOMICS

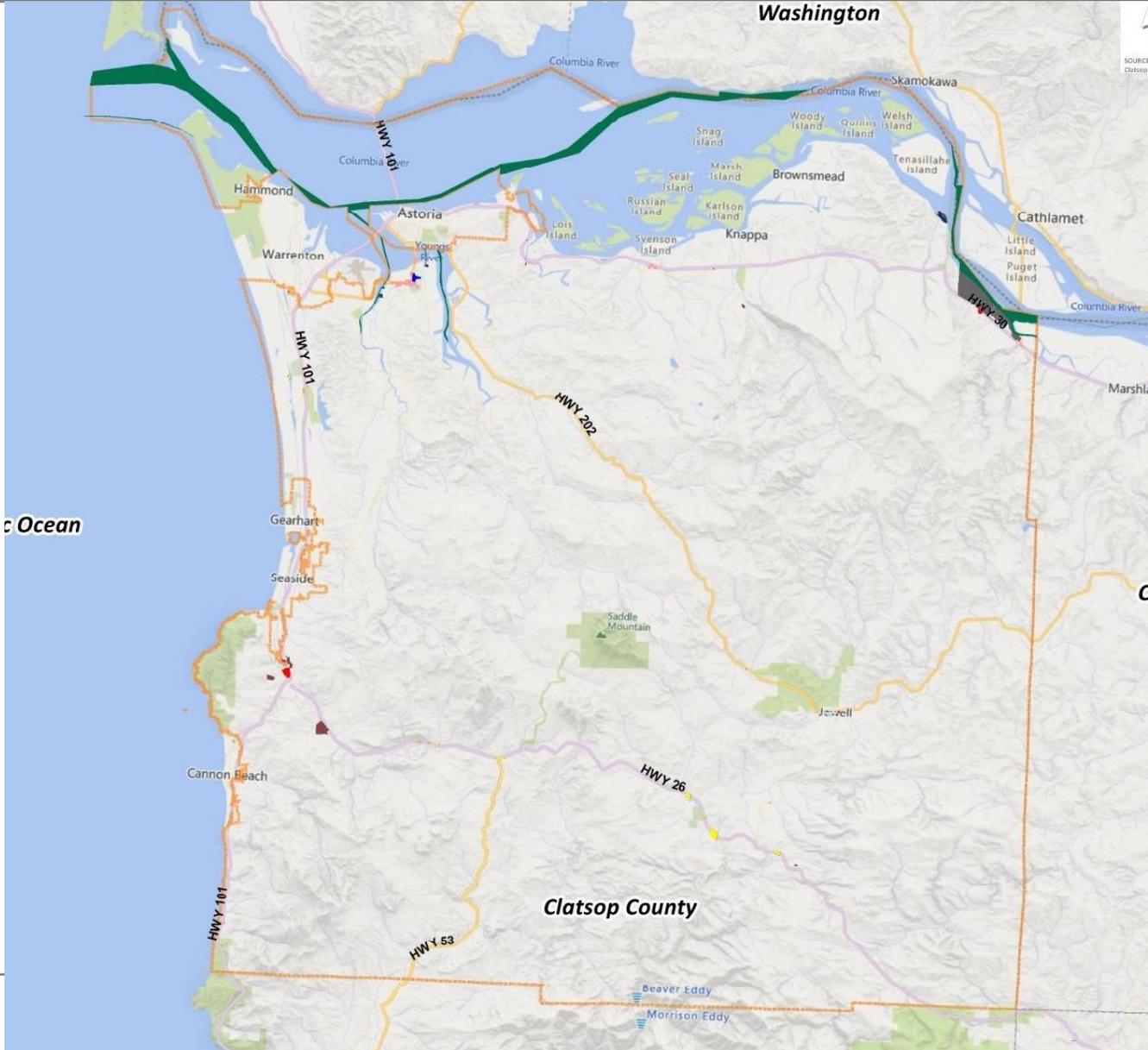
MACKENZIE.

BLI Methodology

- 1. Categorize land zoned or planned for employment.

LEGEND

- Clatsop County Boundary
- County Zoning**
- Commercial Zones**
- GC (General Commercial)
- NC (Neighborhood Commercial)
- TC (Tourist Commercial)
- RCC (Rural Community Commercial)
- RCC-LI (Rural Community Commercial-Light Industrial)
- Industrial Zones**
- AD (Aquatic Development)
- HI (Heavy Industrial)
- LI (Light Industrial)
- MI (Marine Industrial)
- RCI (Rural Community Industrial)
- QM (Quarry Mining)



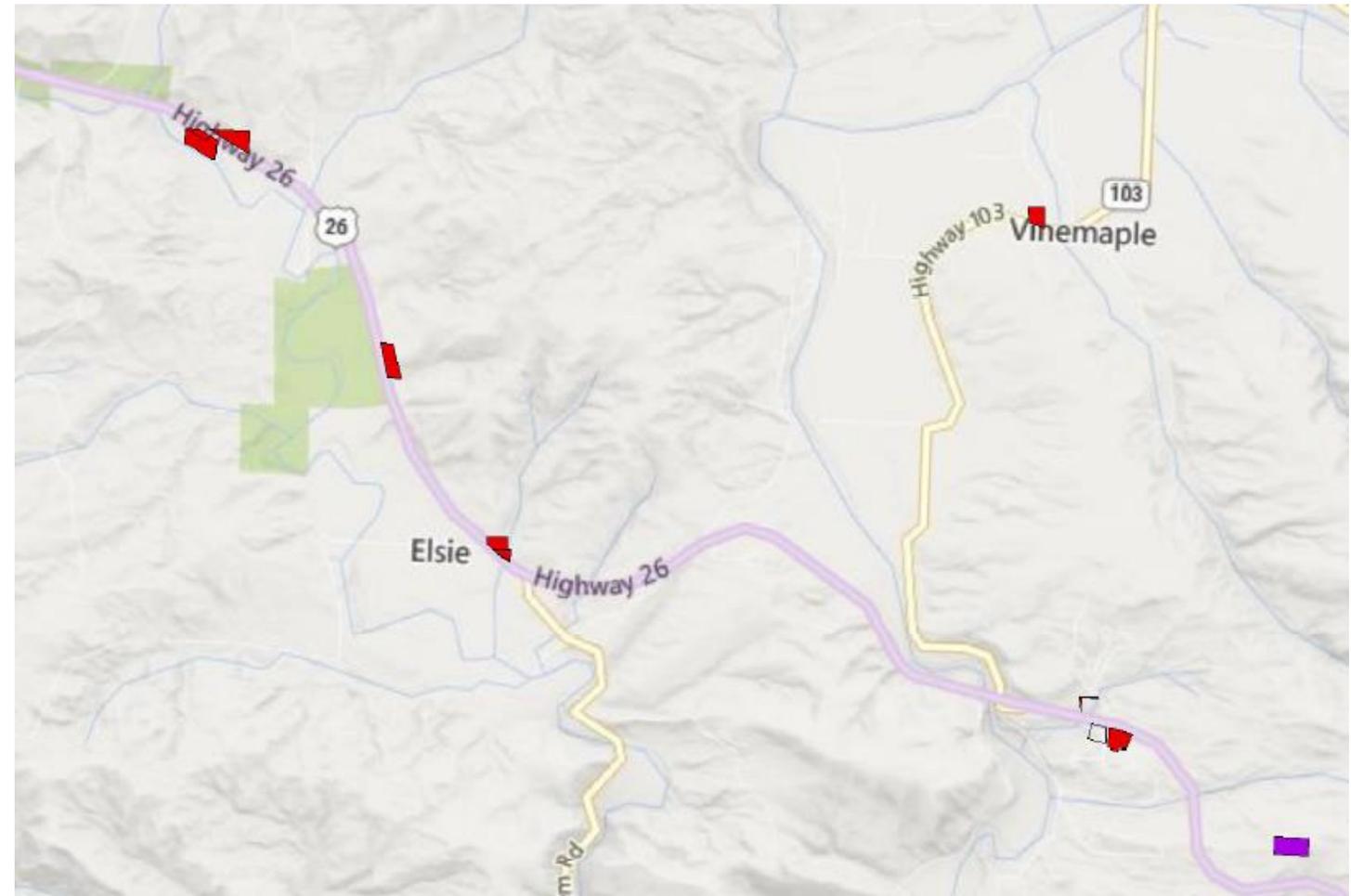
BLI Methodology

2. Determine which properties are vacant or redevelopable.

- **Vacant:** Parcels with Clatsop County Assessor improvement valuation of 0 and with no visually identifiable development (based on aerial photography).
- **Redevelopable (Industrial):** Parcels over two acres with building values less than 30% of the total land value and parcels over 5 acres where less than 0.5 acres occupied by permanent buildings or improvements.
- **Redevelopable (Commercial):** Parcels larger than one acre with building values less than 30% of the total land value and parcels over 5 acres where less than 0.5 acres occupied by permanent buildings or improvements

Buildable Lands Inventory (Draft BLI)

Vacant and Redevelopable Land Map (Figure 3.1 excerpt) – Unincorporated Areas



Note: Excerpt image not to scale

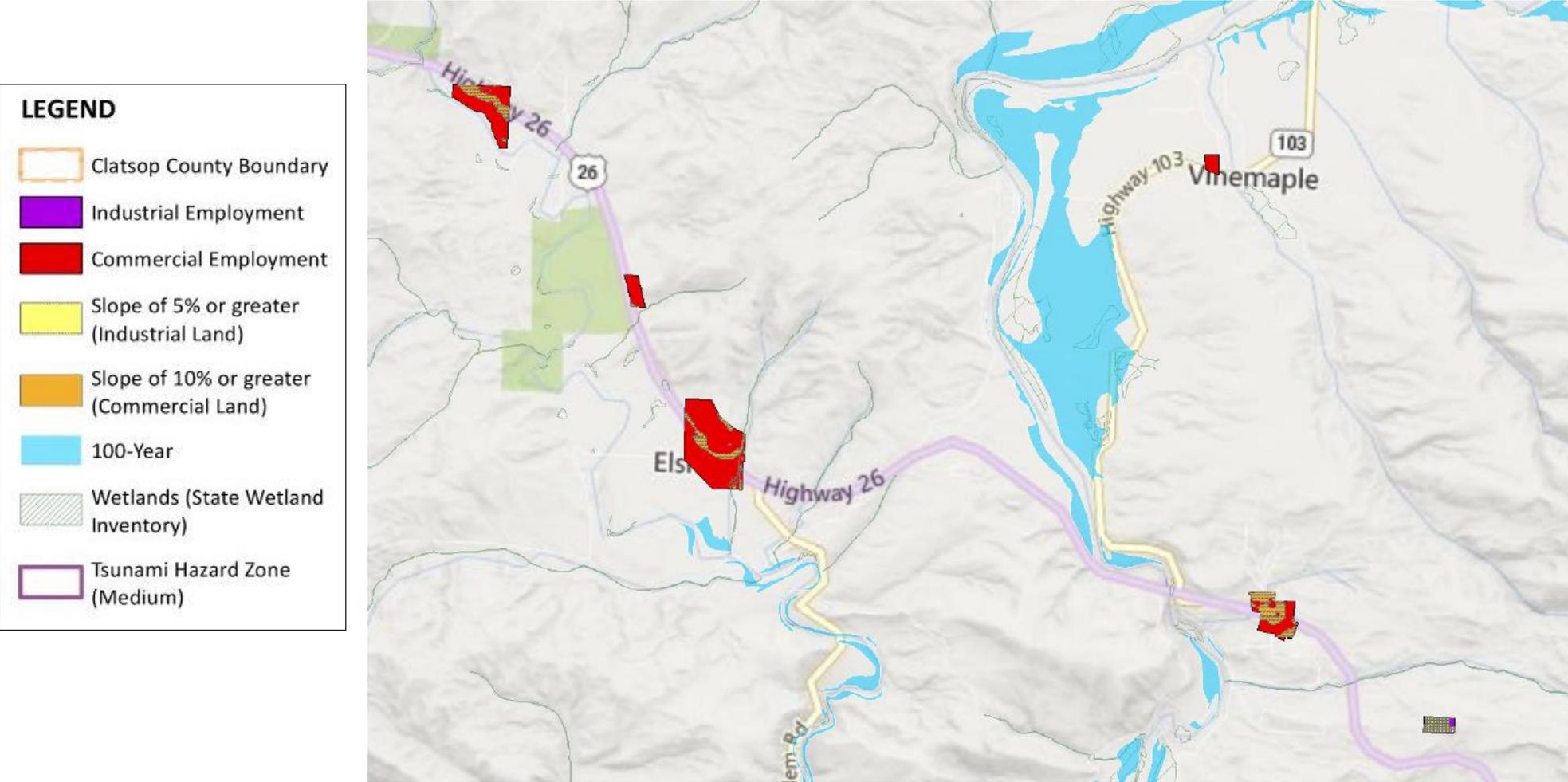
BLI Methodology

3. Identify constraints that preclude development:

- Property within the 1% annual chance floodplain
- Oregon Department of State Lands (DSL) identified wetland areas
- Oregon Department of Geology and Mineral Industries (DOGAMI) identified Medium Tsunami Inundation Scenario
- Slopes
 - 5% or greater for industrial employment land
 - 10% or greater for commercial employment land

Buildable Lands Inventory (Draft BLI)

Development Constraints Map (Figure 4.1 excerpt) – Unincorporated Areas



Note: Excerpt image not to scale

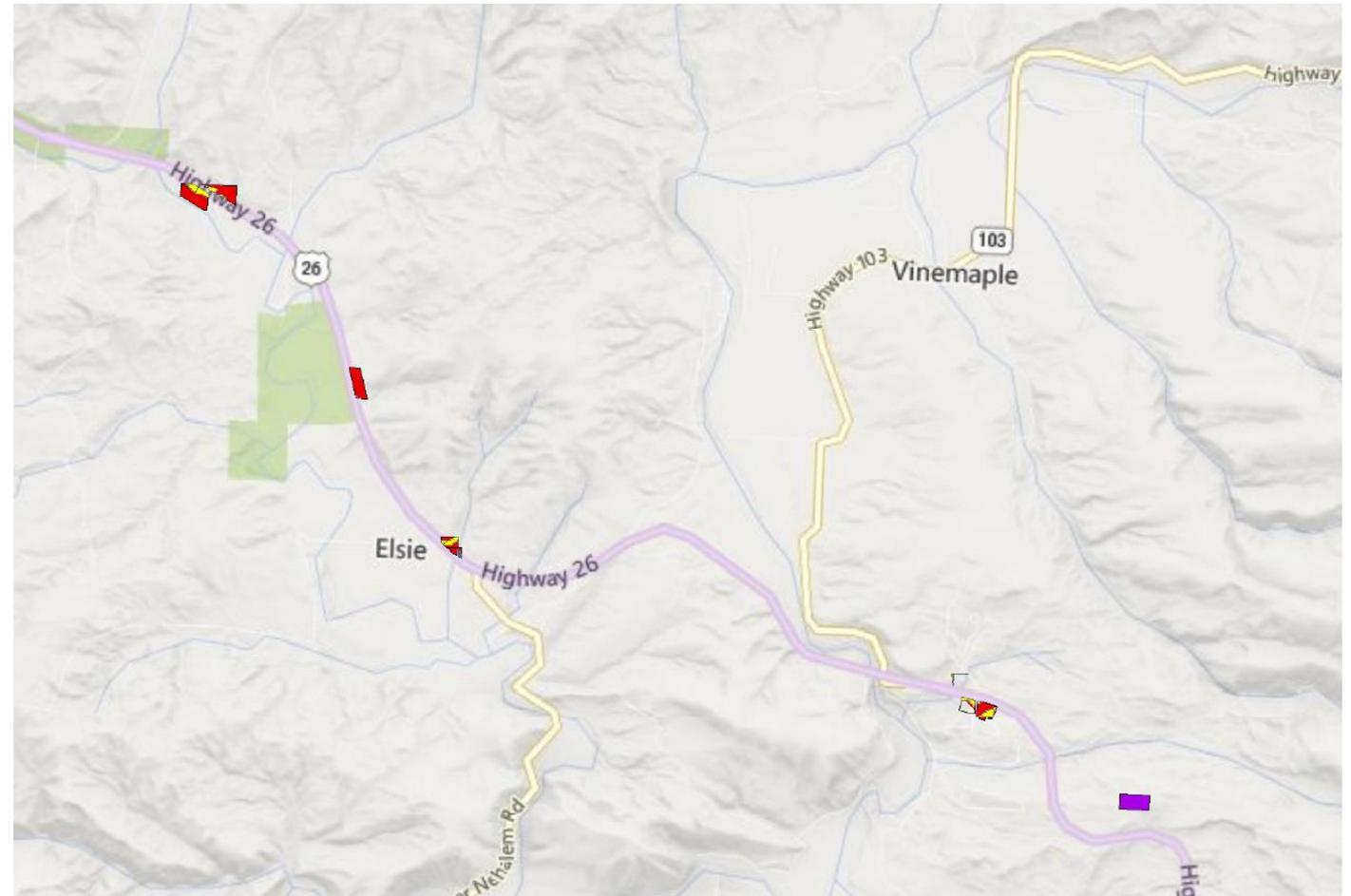
Buildable Lands Inventory (Draft BLI)

BLI Methodology

4. Identify the remaining buildable area of vacant and redevelopable sites after deducting for constraints.

LEGEND	
	Clatsop County Boundary
	Commercial - Vacant
	Commercial - Redevelopable
	Industrial - Vacant
	Industrial - Redevelopable
	Constrained (Unbuildable) Area

Net Buildable Employment Land (Figure 5.1 excerpt) – Unincorporated Areas



Buildable Lands Inventory (Draft BLI)

Preliminary BLI Summary Table – Unincorporated Areas

UNINCORPORATED CLATSOP COUNTY (Areas outside of City Urban Growth Boundaries)						
Zoning Designation	Vacant Parcels	Net Buildable Area (Acres)	Redevelopable Parcels	Net Buildable Area (Acres)	Total Parcels	Total Net Buildable Area (Acres)
GC	3	1.32	0	0.00	3	1.32
NC	1	3.05	1	1.04	2	4.10
TC	13	68.29	3	5.34	16	73.63
RCC-LI	3	1.20	0	0.00	3	1.20
RCC	3	18.18	1	1.00	4	19.19
Commercial Subtotal	23	92.04	5	7.38	28	99
QM	3	2.49	3	11.42	6	13.91
HI	2	1.01	4	43.33	6	44.34
LI	2	3.53	2	33.29	4	36.82
RCI	0	0.00	0	0.00	0	0.00
MI	1	6.30	0	0.00	1	6.30
Industrial Subtotal	8	13.32	9	88.04	17	101.36
Unincorporated County Totals	31	105.37	14	95.43	45	200.79

Revised 1/24/24

Preliminary Findings

- There is approximately 201 acres of net buildable land within unincorporated Clatsop County.
- Commercial zones have approximately 50% of the buildable land.
- Industrial zones have approximately 50% of the buildable land.
- Extensive slope constraints are present on many commercial and industrial sites.

- Public Work Session – Economic Objectives
- Draft Job Growth Forecast and Land/Site Needs
- Refine Buildable Land Inventory
- Draft Economic Development Strategies
- TAG Meeting #3

THANK YOU!



Clatsop County Economic Opportunities Analysis

Technical Advisory Group Meeting #2

January 25, 2024, 10:00 – 12:00 AM

Clatsop County Goal 9

Adopted in June 2023

TARGET INDUSTRY GUIDANCE

- Forestry and Wood Products
- Marine Resources
- Processing Plants
- Visitor Industry
- Education and Health Services



CHALLENGES

- Reductions in Forestry and Wood Products
- Seasonal Nature of marine resource and processing jobs
- Low pay in visitor industry
- Dependence on natural resources
- Fragmented local planning
- Insufficient industrial land in rural areas
- Economic conflicts over resource use
- Disproportionate high number of retirees

From the Comprehensive Plan

- Explore an economic opportunities analysis
- Establish benchmarks for economic activity
- Update the County's buildable lands inventory
- Prioritize telecommunications
- Recognize and support burgeoning economic sectors
- Implement recommendations from the Housing Strategies report
- Encourage and support businesses

Forest Products Policies

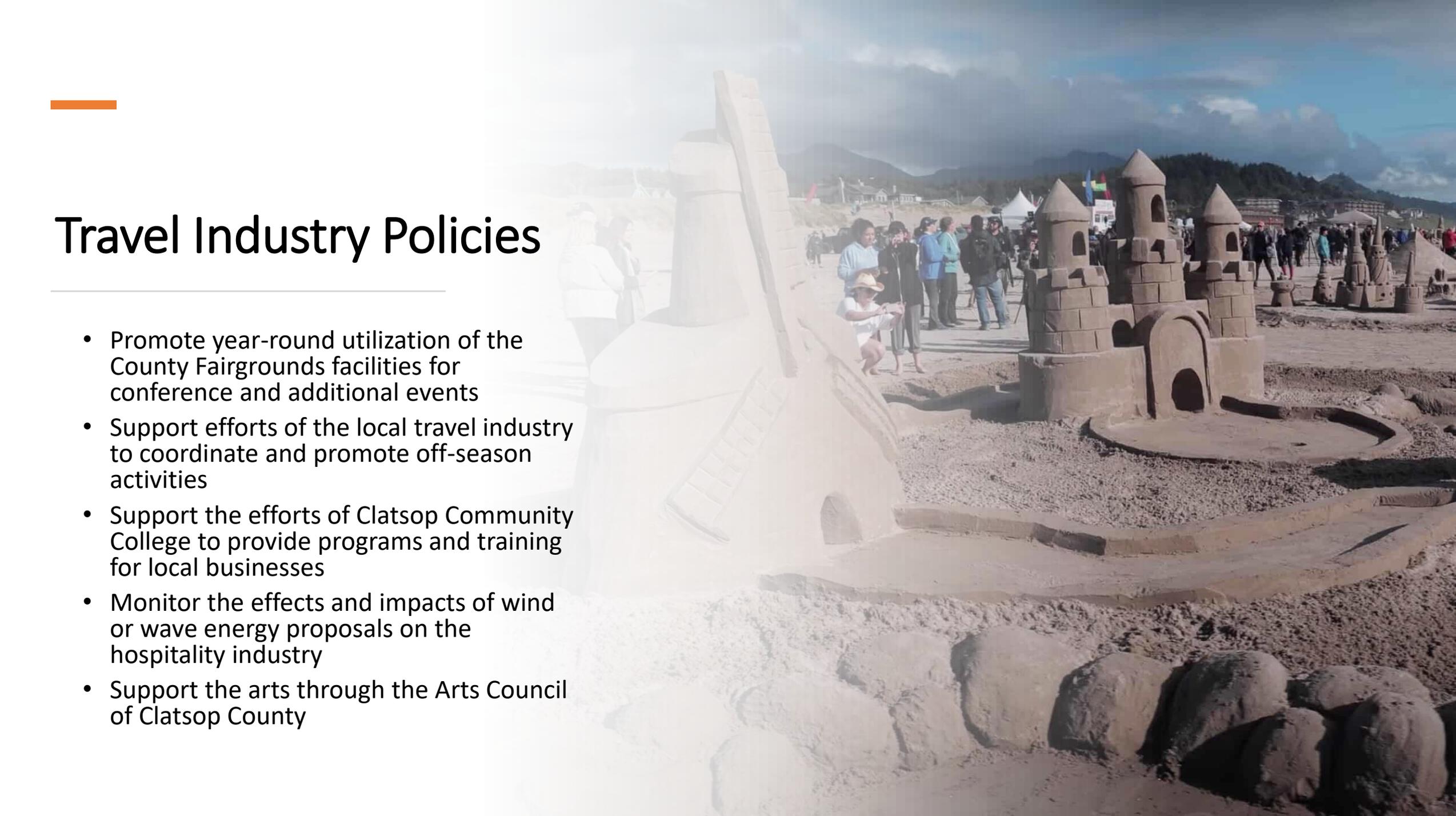
- The Forest Practices Act regulates forestry practices
- Encourage the continuation of the long-term supply of raw products necessary to provide material for County mills
- Collaborate with private industry, the Port of Astoria, CEDR, and other economic development organizations
 - Encourage the location of small businesses in the forest industry
 - Support public actions
 - Consider all measures to encourage expanded local processing of locally grown wood fiber





Marine Resources Policies

- Enhance and protect the marine resource environment
- Encourage scientific research
- Encourage development of methods to expand fishery activity in Clatsop County
- Promote those public facilities and services required to increase the amount of seafood landed in Clatsop County
- Monitor and provide input on the effect of wind or wave energy proposals on fishing and maritime commerce

A large, detailed sandcastle is the central focus of the image. It features multiple towers with conical roofs and arched openings. In the background, several people are gathered on the beach, some looking at the sandcastle. The sky is blue with some clouds, and mountains are visible in the distance. The overall scene is a sunny day at a beach festival or fair.

Travel Industry Policies

- Promote year-round utilization of the County Fairgrounds facilities for conference and additional events
- Support efforts of the local travel industry to coordinate and promote off-season activities
- Support the efforts of Clatsop Community College to provide programs and training for local businesses
- Monitor the effects and impacts of wind or wave energy proposals on the hospitality industry
- Support the arts through the Arts Council of Clatsop County

Additional Policies

Human Resource Policies

- Encourage local county-based firms to cooperate with existing educational institutions to develop and utilize job training programs and hire local unemployed and underemployed individuals
- Work with partners to support employers providing family-wage jobs

Community Resource Policies

- Continue to delegate economic development processes to CEDR and the Columbia-Pacific Economic Development District
- Incorporate the Port of Astoria's Strategic Business Plan
- Require impact assessments for destination resort applications

