

The background image shows a park scene. At the top, a bird with its wings spread is perched on a tree branch. Below it, a large, semi-transparent yellow rectangle contains the title text. The bottom of the image features a stone pond with water, surrounded by rocks and greenery. The word "TUALATIN" is faintly visible in the background, overlaid on the yellow rectangle.

Tualatin 2040

**Preliminary Findings of
Tualatin's Economic
Opportunities Analysis
Advisory Committee
June 27, 2019**



Tonight's Discussion

- Overview of an Economic Opportunities Analysis
- Preliminary Results of the Commercial and Industrial Buildable Lands Inventory
- Employment Demand Analysis
- Discussions
- Next steps



Tualatin 2040:
What is an Economic Opportunities Analysis?

June 27, 2019



Why complete an EOA?

- Legal requirements – Goal 9 – Economy
 - Economic opportunities analysis
 - Industrial and commercial development policies
 - Identify land deficits
 - Designation of lands for employment
- Understand existing conditions and forecast future conditions to inform:
 - Economic development strategy, land use policies, and coordination efforts



Overview of the EOA Work Program

- Inventory of buildable commercial / industrial land
 - Information about characteristics of vacant land
- Forecast Employment Growth
 - Understand Tualatin's competitive advantages
 - Identify potential growth industries
 - Forecast employment and land needs
- Develop economic development strategy – policies, objectives, and actions

The background image shows a lush green park scene. In the upper center, a bird with its wings spread is perched on a branch. Below it, a large yellow rectangular box contains the title text. The bottom of the image shows a small pond with rocks and some greenery.

Preliminary Buildable Land Inventory Results for Commercial and Industrial Lands

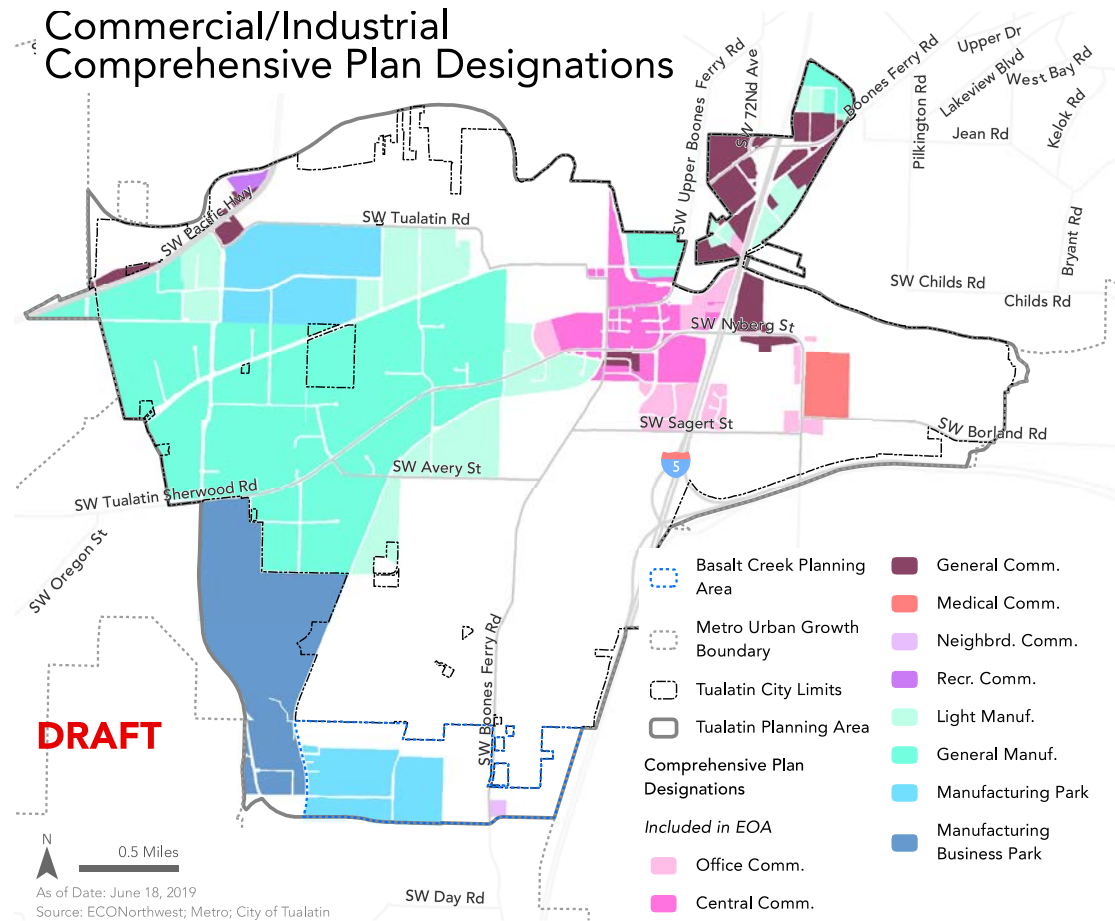
Tualatin 2040:
BLI Results prepared by ECONorthwest

June 27, 2019



Tualatin Land Base

- Office Commercial
- Central Commercial
- General Commercial
- Medical Commercial
- Neighborhood Commercial
- Recreational Commercial
- Light Manufacturing
- Manufacturing Park
- Manufacturing Business Park



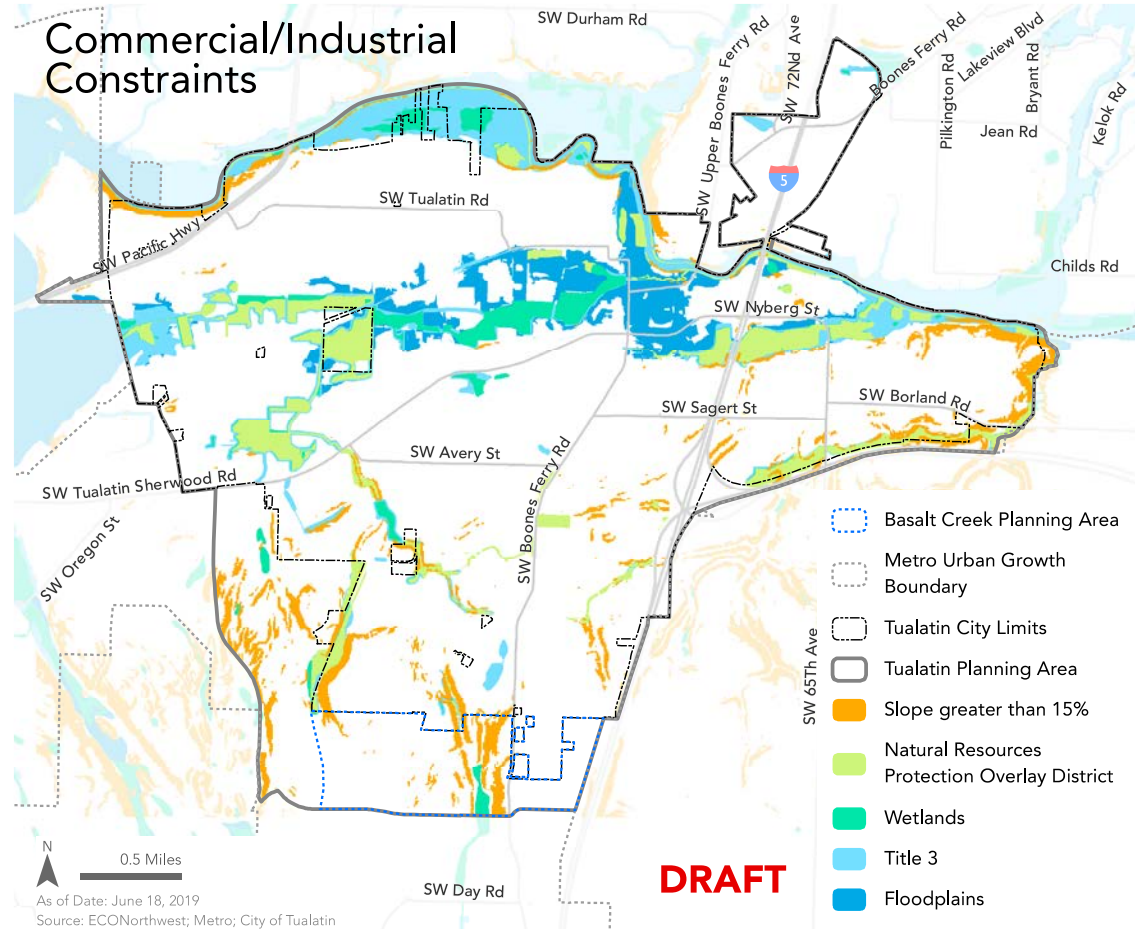
Tualatin 2040:
BLI Results prepared by ECONorthwest

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Constraints

- Slope greater than 15%
- Natural Resources Protection Overlay Dist.
- Wetlands
- Title 3
- Floodplain

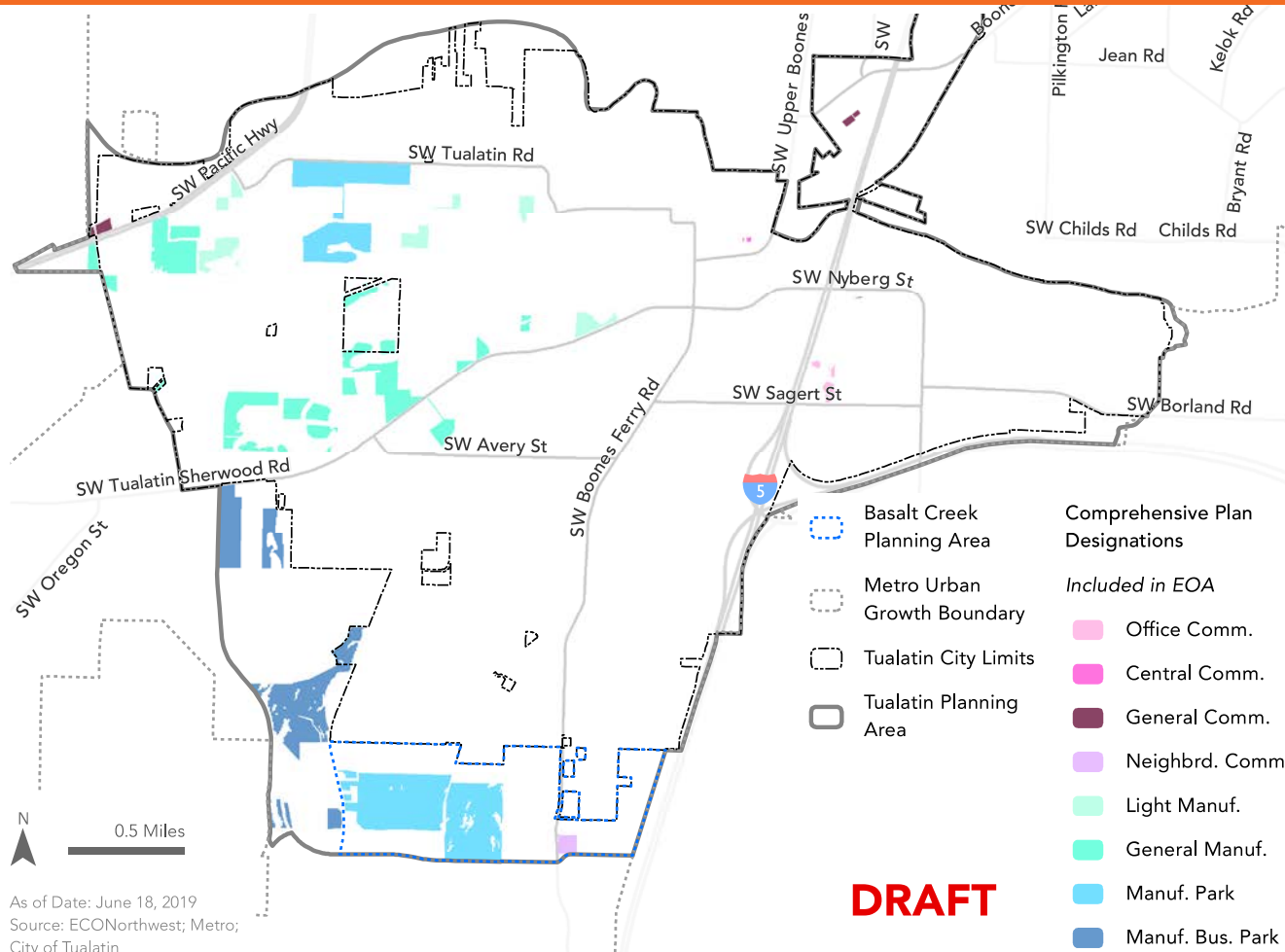


Tualatin 2040:
BLI Results prepared by ECONorthwest

June 27, 2019



Unconstrained Vacant and Partially Vacant



Tualatin 2040:
BLI Results prepared by ECONorthwest

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Buildable Land Inventory

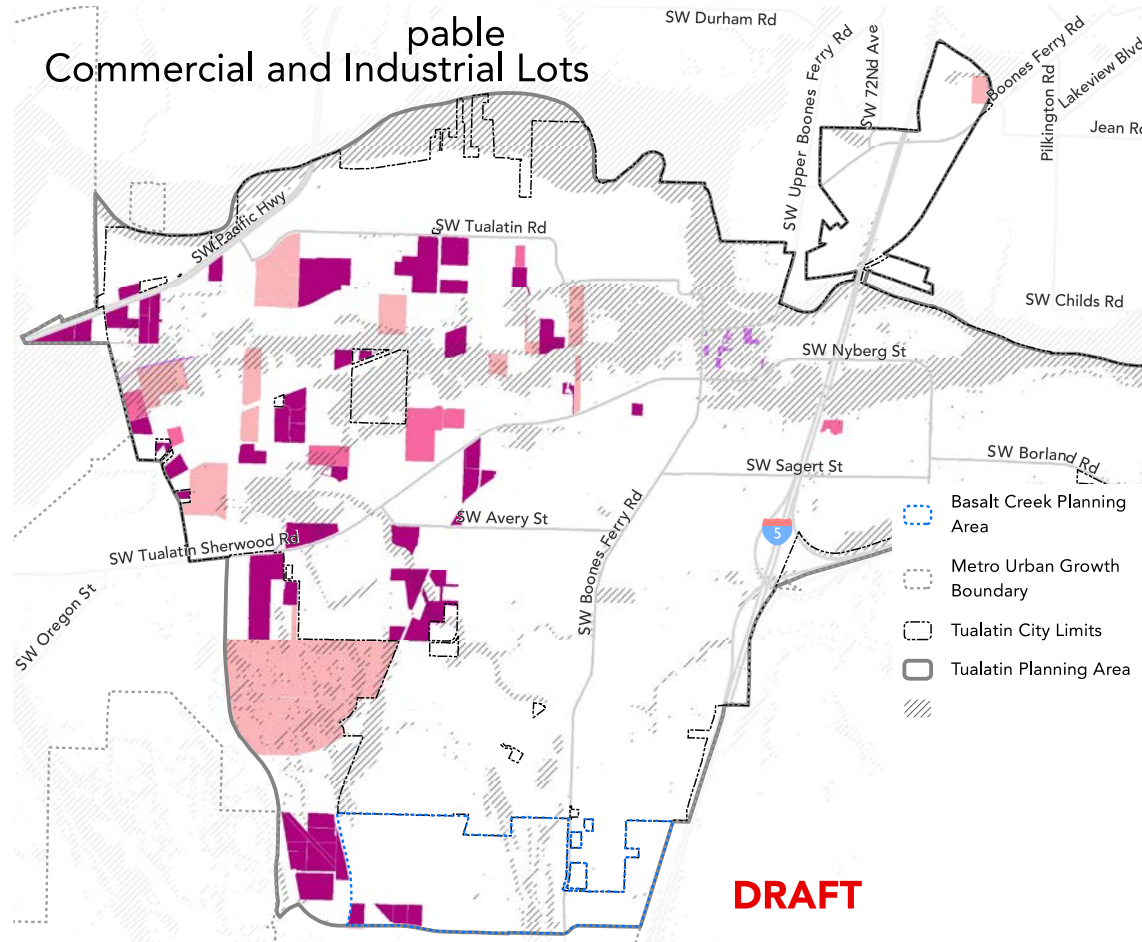
Plan Designation	Total Buildable Acres
<i>Commercial</i>	
General Commercial	4 acres
Office Commercial	3 acres
<i>Industrial</i>	
General Manufacturing	99 acres
Light Manufacturing	29 acres
Manufacturing Business Park	85 acres
<i>Basalt Creek</i>	
Manufacturing Park	105 acres
Neighborhood Commercial	4 acres

Note: The following plan designations (outside of Basalt Creek) are excluded from the table. They do not have unconstrained vacant land:
Central, Medical, Neighborhood, and Recreational Commercial; Manufacturing Park.

Land in the Mixed-Use Commercial and Central Tualatin Overlay Zones also do not have unconstrained vacant land.



Redevelopment Potential



Tualatin 2040:
Potentially Redevelopable Land (Metro Strike Price Method)

June 27, 2019



Tualatin 2040:
Preliminary Results from Demand Analysis

June 27, 2019

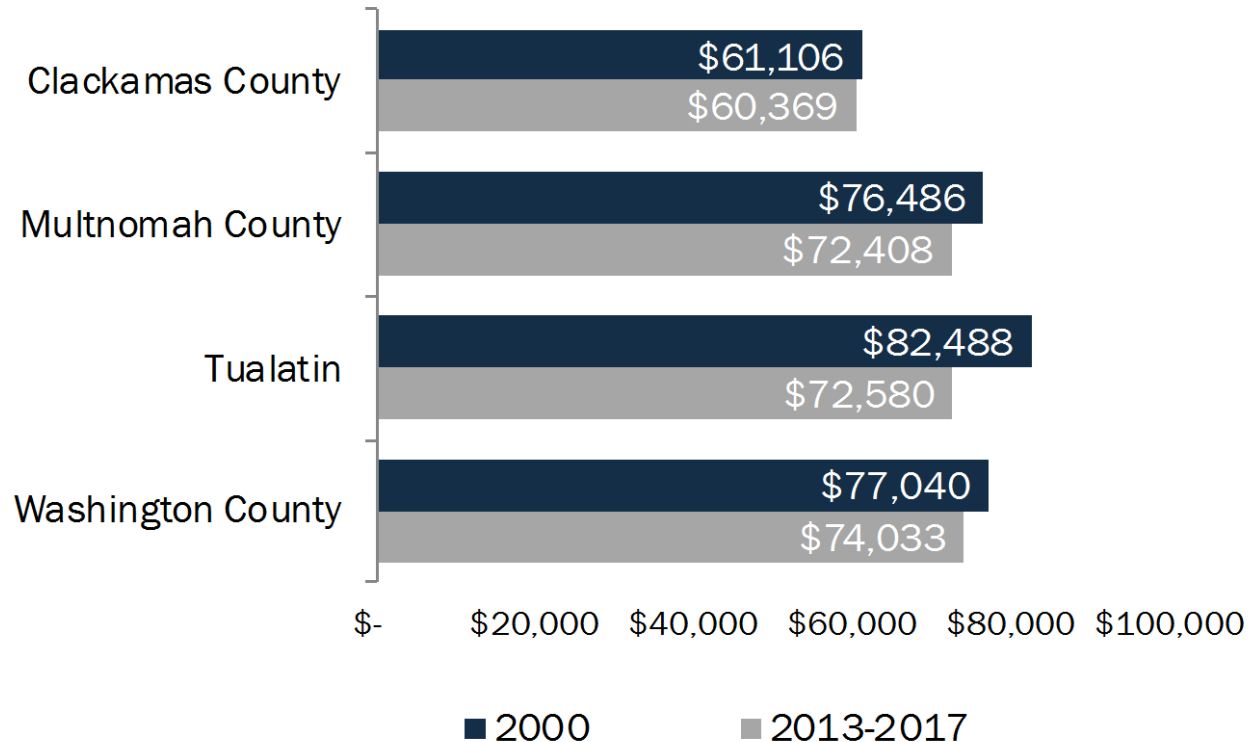


Mixed Recovery from the Recession

Median Household Income (Inflation-adjusted 2017 \$)

Tualatin,
Multnomah Co.,
Washington Co.,
and Clackamas Co.,
2000 and 2013-
2017

Source: U.S. Census Bureau
2000, American Community
Survey 2013-2017 5-year
estimates.



Tualatin 2040:
Preliminary Results from Demand Analysis

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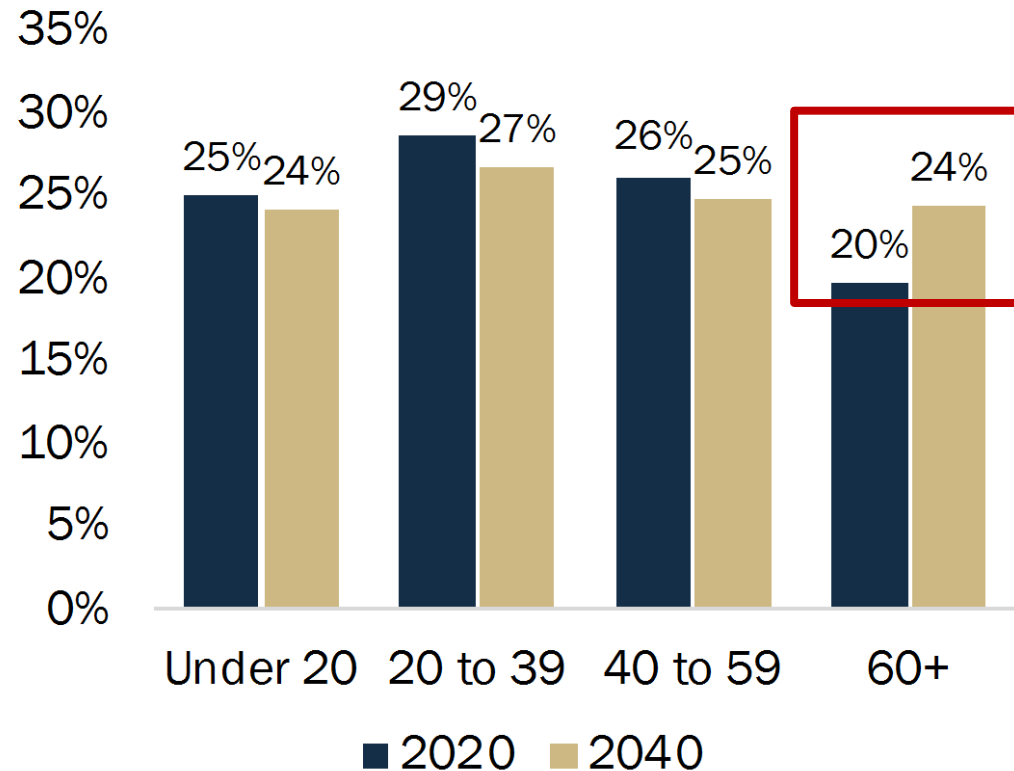
Aging Population

Population Growth by Age Group, Washington County, 2020 and 2040

Source: Portland State
University, Oregon Population
Research Center.

16%

of Tualatin's
population was 60
years of age or older
(2013-2017 period)



Tualatin 2040:
Preliminary Results from Demand Analysis

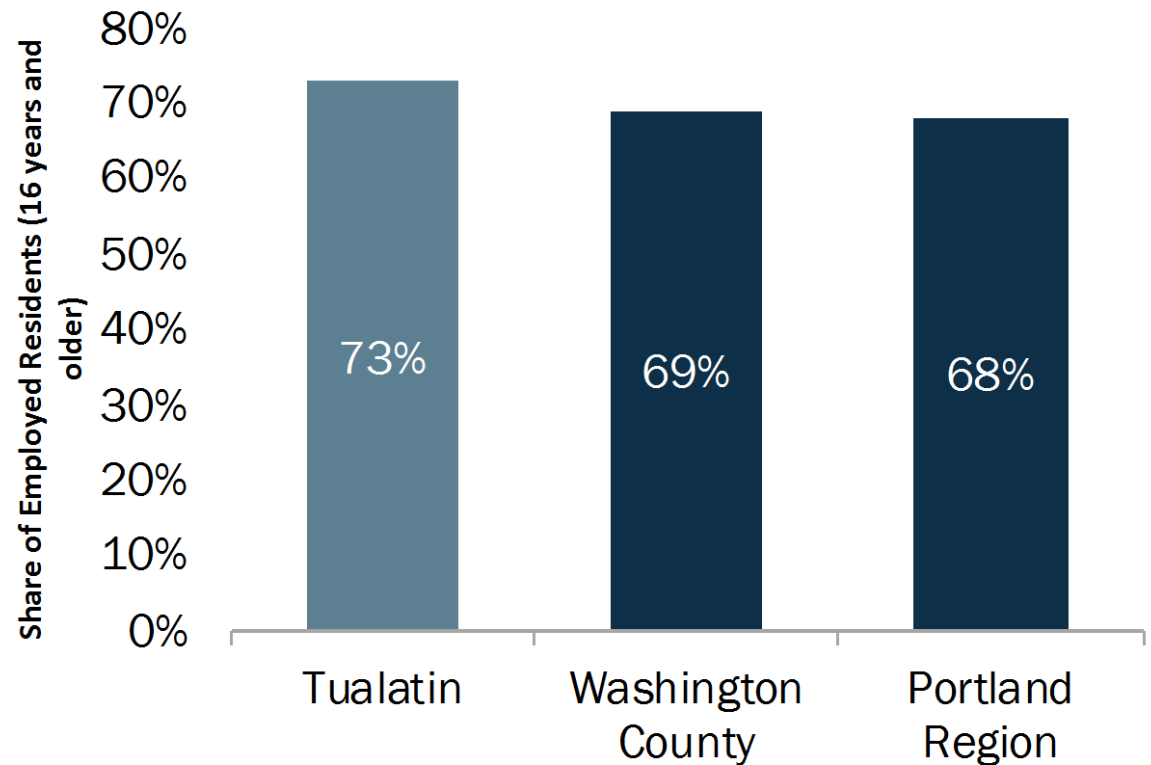
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Labor Force Participation

Labor Force Participation Rate, Tualatin, Washington County, and Portland Region, 2013-2017

Source: U.S. Census Bureau, American Community Survey 2013-2017 5-year estimates.



Tualatin 2040:
Preliminary Results from Demand Analysis

June 27, 2019



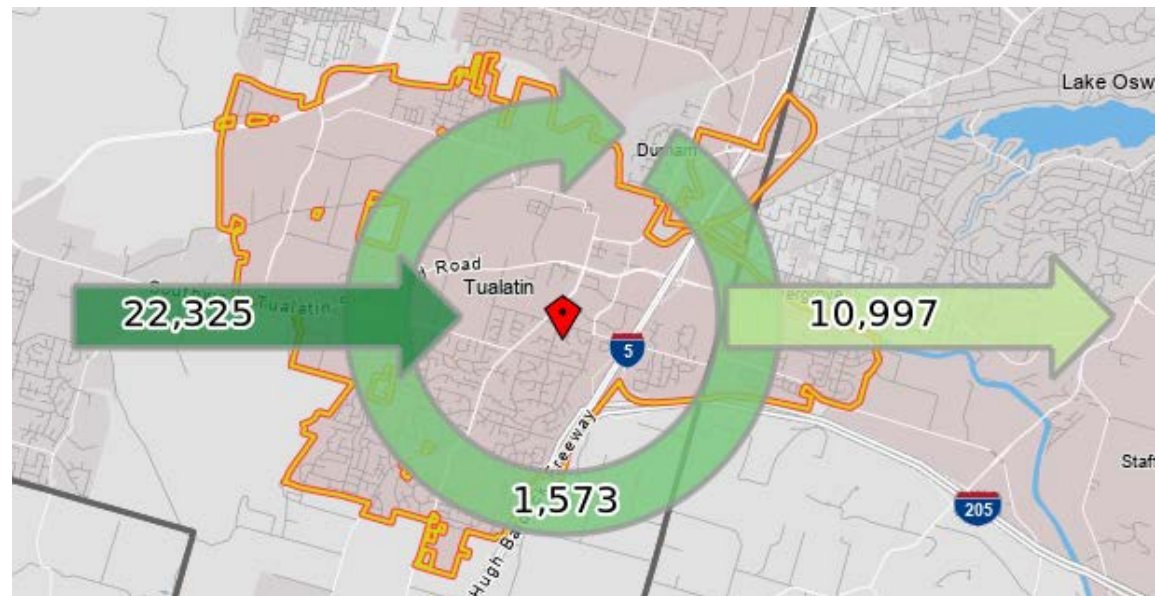
Commuting Patterns

Commuting Flows, Tualatin, 2015

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

Workers in
Tualatin live in:

- Washington County
- Clackamas County
- Multnomah County
- Marion County
- Yamhill County



Tualatin 2040:
Preliminary Results from Demand Analysis

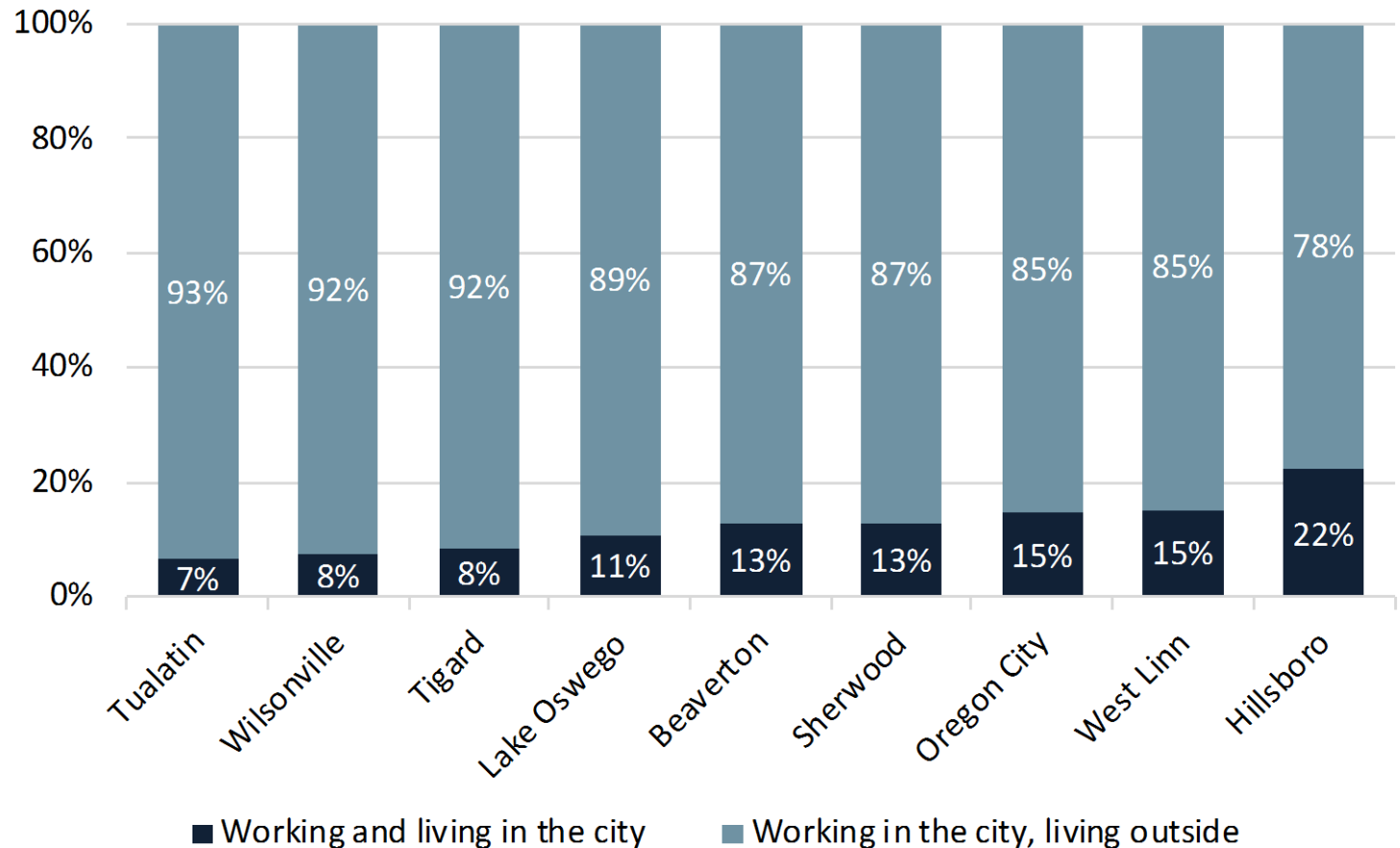
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Commuting Patterns of Other Cities

Commuting Flows, Tualatin and Comparison Cities, 2015

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

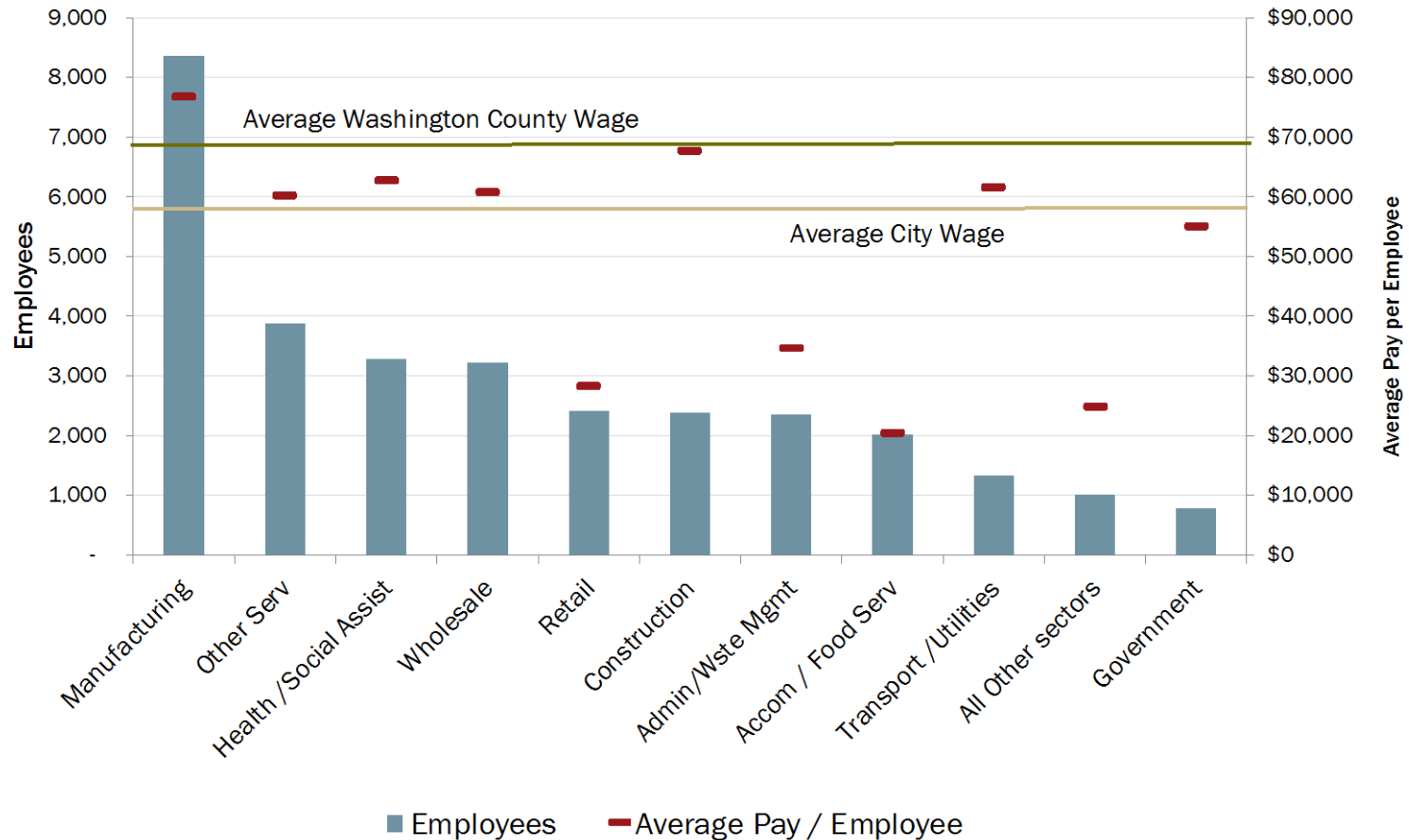


Tualatin 2040:
Preliminary Results from Demand Analysis

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Employment in Tualatin, 2017

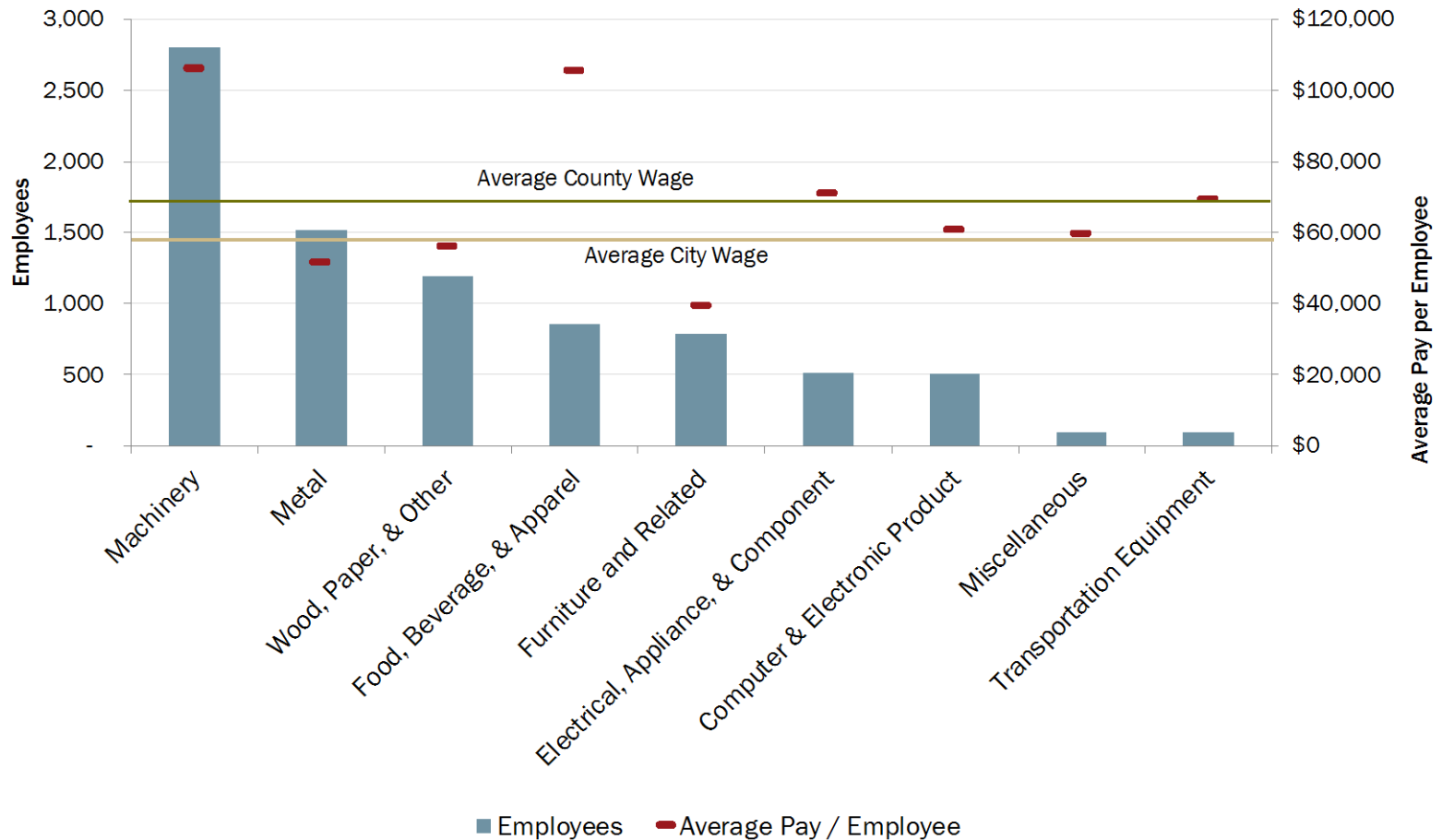


Tualatin 2040:
Preliminary Results from Demand Analysis

June 27, 2019



Manufacturing Employment Details



Tualatin 2040:
Preliminary Results from Demand Analysis

June 27, 2019



Employment Forecast Assumptions

- Employment base
- Growth rates
- Mix of employment
- Employment density

Note: The numbers in the employment forecast are subject to change, with refinement of the EOA



Estimating Total Employment

Covered Employment, Tualatin, 2017

Source: QECW.

Sector	Covered Employment	Estimated Total Employment	Covered % of Total
Agriculture, Forestry, and Mining	162	162	100%
Construction	2,384	3,018	79%
Manufacturing	8,371	8,761	96%
Wholesale Trade	3,235	3,805	85%
Retail Trade	2,429	2,926	83%
Transportation and Warehousing and Utilities	1,337	1,734	77%
Information	195	235	83%
Finance and Insurance	380	675	56%
Real Estate and Rental and Leasing	294	1,175	25%
Professional and Technical Services	1,044	1,821	57%
Management of Companies	789	827	95%
Admin. and Support / Waste Mgmt and Remediation Serv.	2,366	2,942	80%
Private Education Services	296	552	54%
Health Care and Social Assistance	3,291	4,019	82%
Arts, Entertainment, and Recreation	846	1,658	51%
Accommodation and Food Services	2,017	2,201	92%
Other Services	879	1,532	57%
Government	787	795	99%
Total Non-Farm Employment	31,102	38,838	77%

Tualatin 2040:
Preliminary Results from Demand Analysis

June 27, 2019



Employment Growth Scenarios

Potential Employment Growth Assumptions, Tualatin

Year	Total Employment Low	Total Employment Medium	Total Employment High
2020	39,355	40,252	40,478
2040	42,985	51,089	53,332
Change 2020 to 2040			
Employees	3,630	10,837	12,854
Percent	9%	27%	32%
AAGR	0.44%	1.20%	1.39%

Tualatin 2040:
Preliminary Results from Demand Analysis

June 27, 2019



Employment Assumption Comps.

Employment Growth Assumptions from Comparison Cities

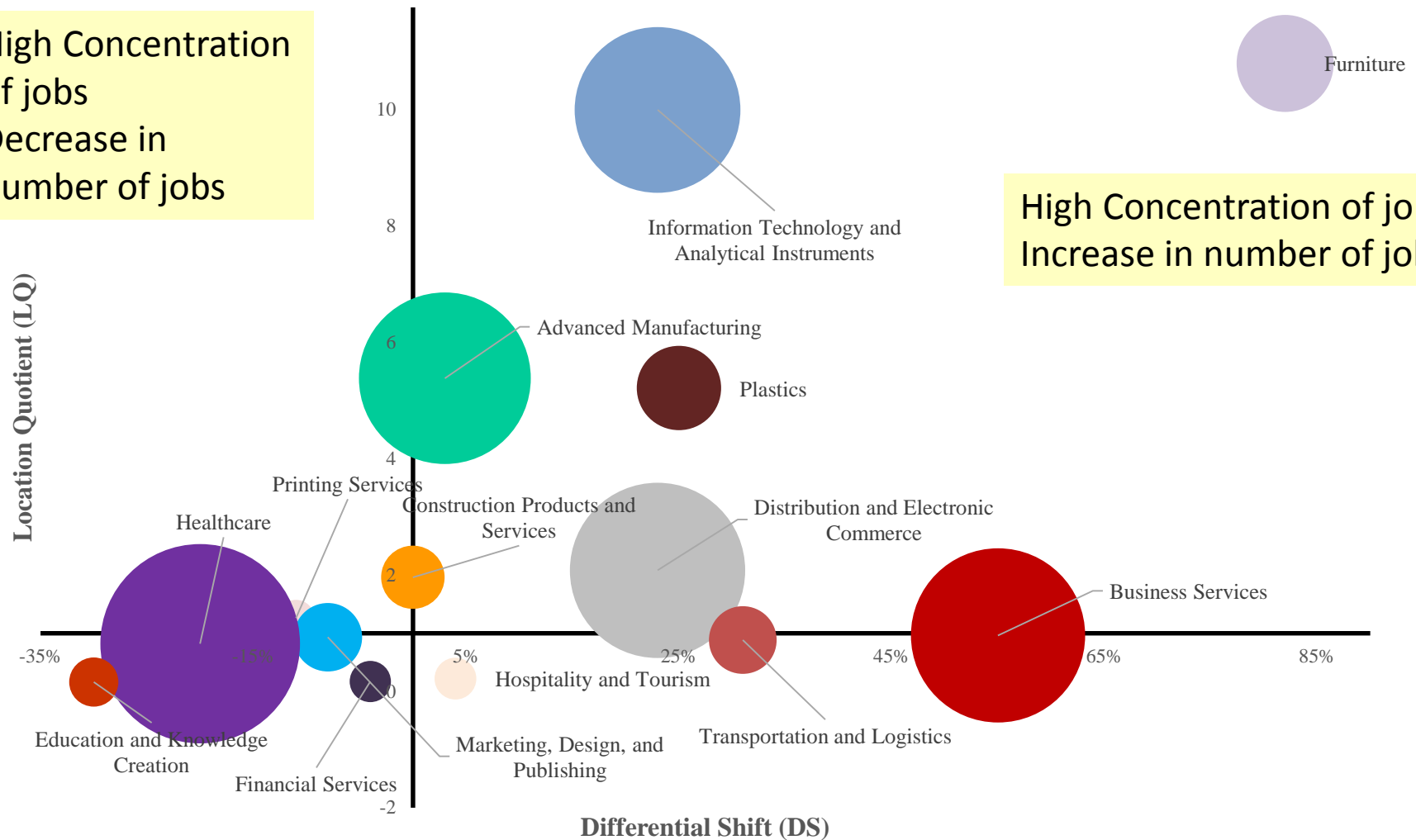
City	Planning Period	New Employees	Employment Growth Rate
Sherwood	2018 to 2038	2,184	1.2%
Beaverton	2015 to 2035	28,645	1.4%
Lake Oswego	2010 to 2035	13,741	2.1%
Wilsonville	2007 to 2027	20,081	3.2%



Potential Growth Industries

High Concentration
of jobs
Decrease in
number of jobs

High Concentration of jobs
Increase in number of jobs



Source: City of Tualatin Cluster Analysis

June 27, 2019



Potential Growth Industries

- Food Processing and Manufacturing
- Furniture
- Plastics
- Information Technology and Analytical Instruments
- Distribution and Electronic Commerce
- Advanced Manufacturing
- Business Services

The background image shows a campus scene. At the top center, a bird sculpture with its wings spread is perched on a structure. Below it, a large, semi-transparent yellow rectangle contains the title text. The background also features lush green trees, a red bush, and a small pond with rocks and water at the bottom.

Group Discussions on Economic Development Strategies: Part 1



Developing the Housing Strategy

Process for Developing the Economic Development Strategy

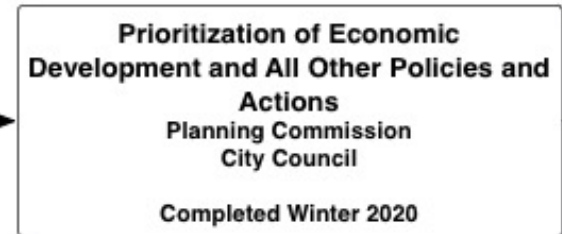
Step 1:
Start Tonight
Continued at
8/22 meeting

Step 2:
8/22 meeting

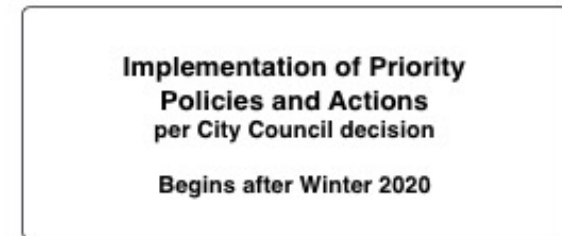
Step 3:
8/22 meeting



Policy Prioritization



Policy Implementation





What do other cities do?

- Land availability
 - Is there enough land with the right zoning?
 - Is there a sufficient short-term supply of land (land that is ready for development within 1 year of building permit)
- Infrastructure
 - Do key sites have services?
 - Are there infrastructure deficiencies that limit business growth?
 - Use of Urban Renewal to address infrastructure problem



What do other cities do?

- Business retention, growth, and attraction
 - Assistance to existing businesses – loans, upgrades to infrastructure, assistance finding a new site
 - Entrepreneurship support – innovation hub, business incubator, shared work space, etc.
 - Recruitment and marketing – development-ready sites, other incentives
 - Incentives – low-interest loans, enterprise zones or other tax abatements, reduced fees or SCDs, direct financial incentives, etc.



Questions for Discussion

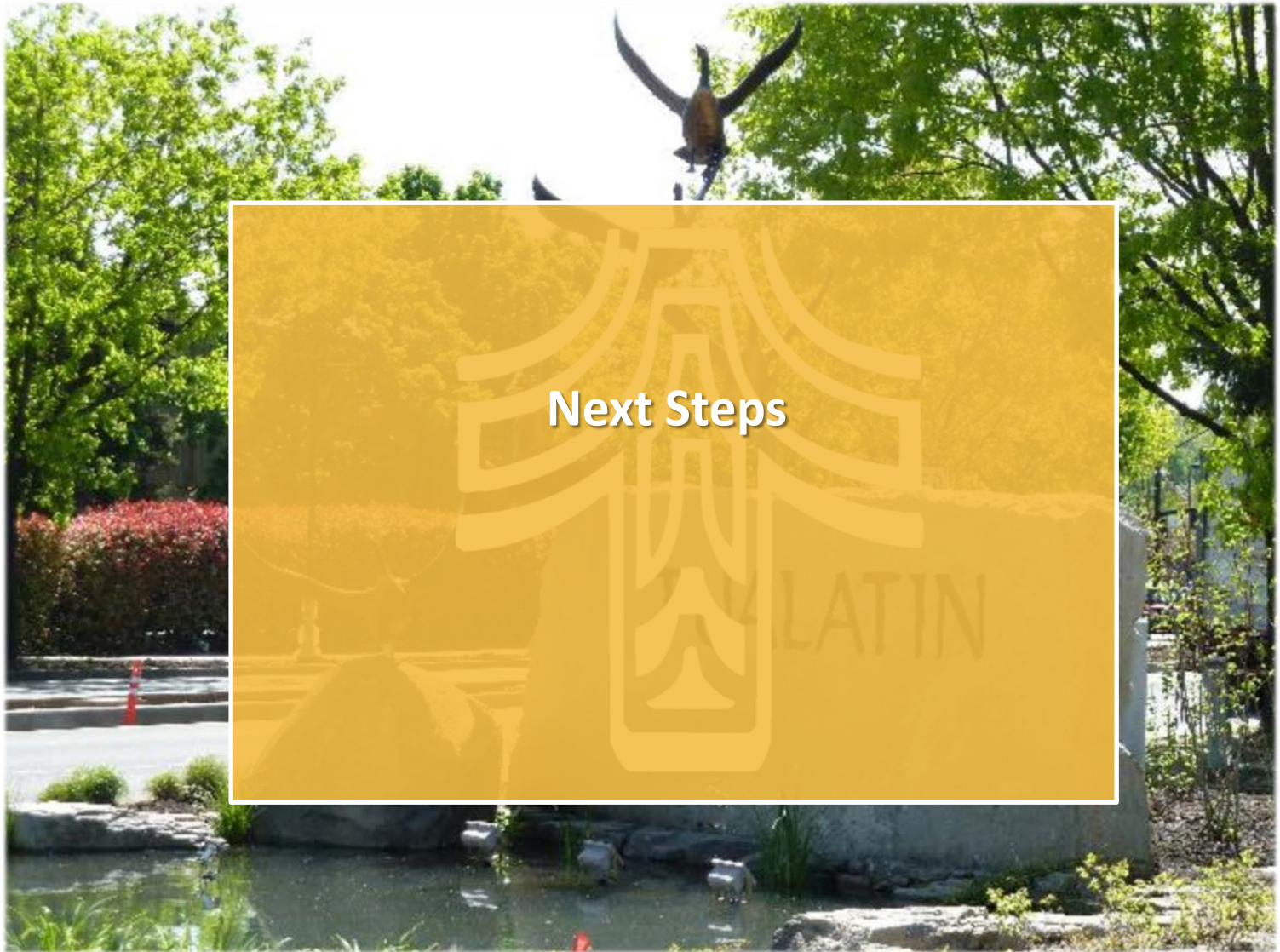
- Small Group Discussion

What makes Tualatin a good place to do business?

What are problems with doing business in Tualatin?

- Large Group Discussion (go around the table)

What do you think the City's role should be to build on its assets and to overcome the challenges?





Next Steps

- ECONorthwest to continue conducting Economic Opportunities Analysis and drafting Housing Strategy
- Public Open House #1: July 23 & July 26
 - Community feedback on HNA, EOA, BLI; policy prioritization; and housing strategy recommendations
- Next CAC #5 meeting: August 8, 2019 at 6p - 8p
 - CAC feedback on HNA draft report and discussion of draft housing strategy memorandum and developing actions to address housing needs