

*City of Florence*  
**A City in Motion**

# City of Florence

## Housing Needs Analysis and Economic Opportunities Analysis: Volume 2: Technical Report



# ACKNOWLEDGEMENTS

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This work is made possible through the sincere input by City staff and the Florence Housing and Economic Opportunities Project (HEOP) ad-hoc advisory committee, as well as nearly 700 community members that participated in the planning process. We specifically recognize and appreciate the time and attention dedicated to this work by the following people.

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# Section I. INTRODUCTION

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The Florence Economic Opportunities Analysis (EOA) and Housing Needs Analysis (HNA) are intended to serve as a basis for the City to explore and document new information regarding the City's buildable land inventory (BLI), population and employment trends, and development policies and objectives aimed at strengthening the local economy and providing adequate land to handle the next 20 years of growth. The Florence EOA serves as a basis for the City to document and adopt local policies and actions that help make the City a more economically viable community for residents, businesses and workers. The HNA evaluates housing demand, land needs policies to meet state and local housing objectives.

## I.A. OREGON REGULATORY REQUIREMENTS

Florence is undergoing a review of its Comprehensive Plan per Oregon requirements. As part of the Comprehensive Plan update, the City must address the requirements of Goal 9 (Economic Development, OAR 660-009) and Goal 10 (Housing).

These goals require cities to periodically review and update the following:

- Local vision for strengthening local economies through the adoption of local economic policies that include community economic development objectives;
- Local urban growth requirements (land needs) for providing adequate land needed to accommodate 20-year employment and population growth forecasts. Land needs are to be based upon:
  - Current analysis of vacant and part-vacant buildable lands that are zoned or planned to accommodate employment and housing growth.
  - Forecast land needs and housing requirements in a manner that is consistent with regional growth forecasts and coordinated population growth forecasts.

## I.B. METHODOLOGY AND APPROACH

### EOA Methodology

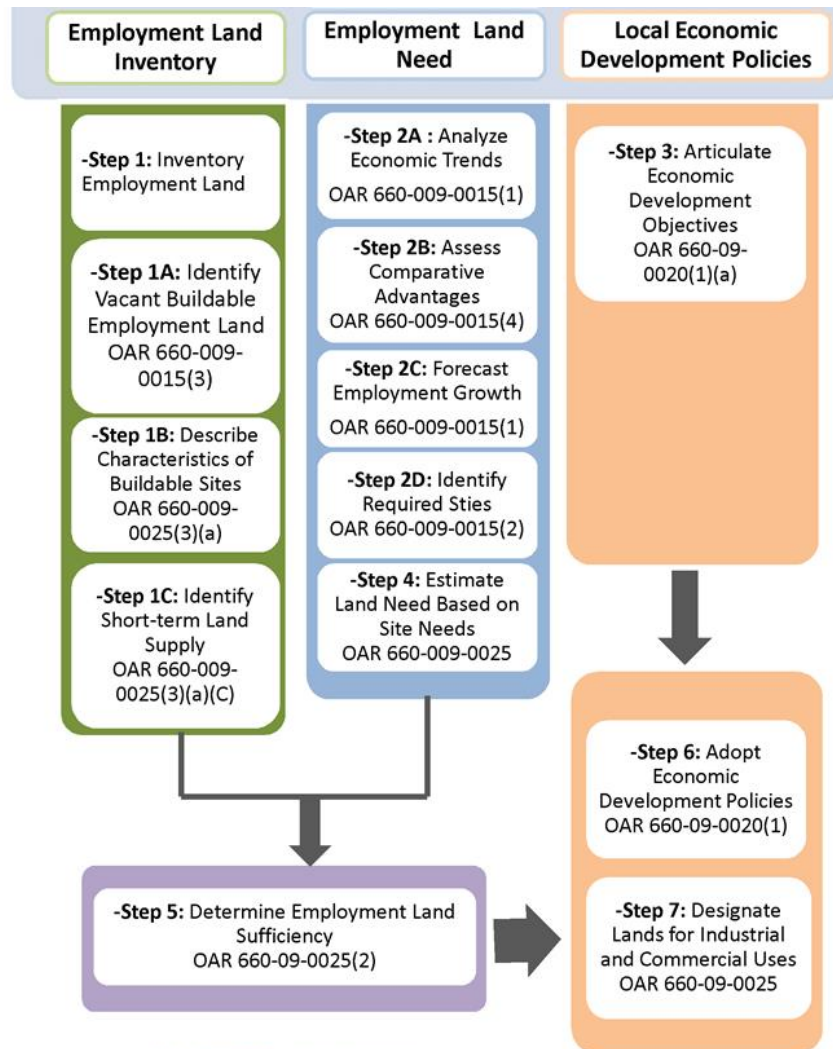
The technical and political approach used for the Florence EOA and related steps are illustrated in Exhibit I.1. This approach is consistent with the DLCD Goal 9 administrative rule, the supporting OAR 660 guidance, as well as other supporting guidance provided per the DLCD Industrial & Other Employment Lands Analysis Guidebook (2005) and the Economic Development and Employment Land Planning Guidebook (July 2010).

To assist the City and consultant team with creating the EOA and refining key assumptions, the City formed the Housing and Economic Opportunities Project (HEOP) Committee to provide guidance throughout the process. The HEOP is comprised of community members, property owners and

business owners/managers. During the preparation of the EOA and HNA, the HEOP met on three separate occasions.

In addition to HEOP meetings, the consultants conducted interviews with local business managers, and development experts, to ascertain Florence’s perceived strengths and weaknesses for retaining and attracting industrial and commercial development.

**Exhibit I.1: Florence EOA Methodology and Approach**

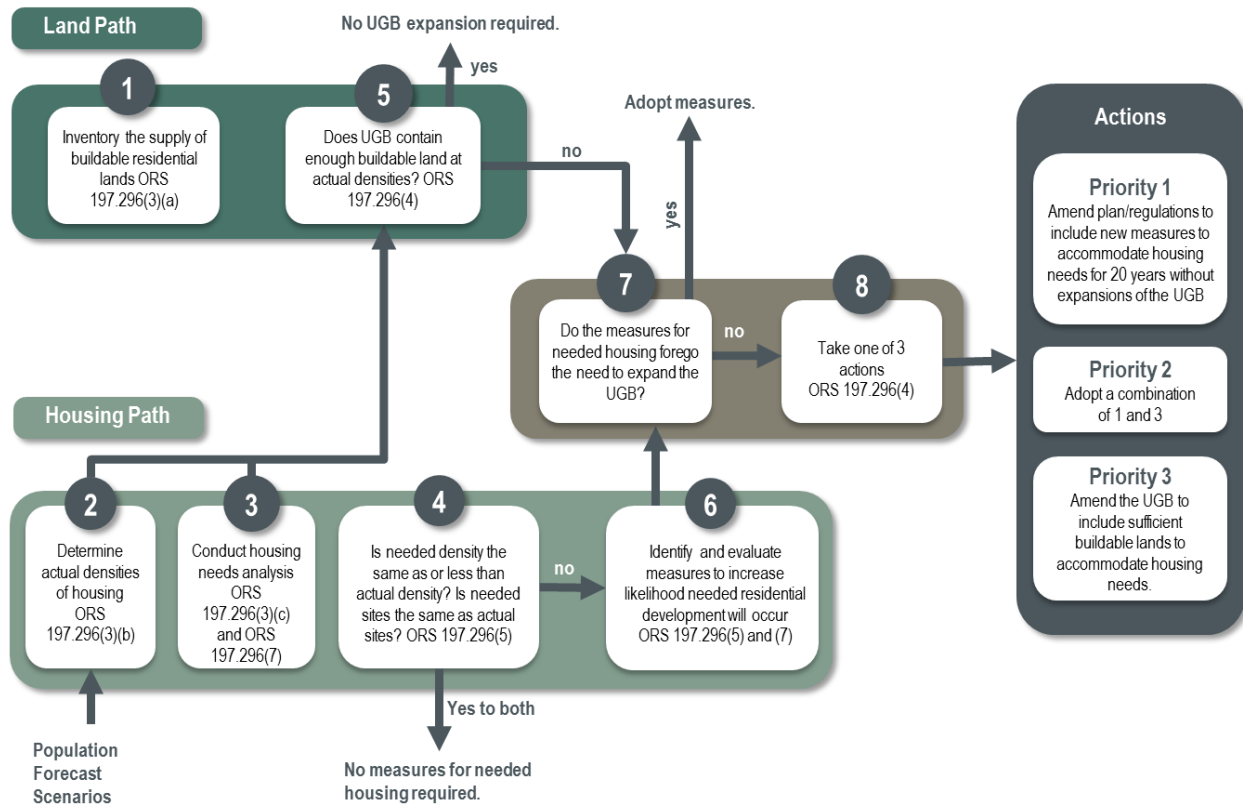


**HNA Methodology**

The approach used for the Florence HNA and related steps are illustrated in Exhibit I.2. This approach is consistent with the DLCDC Goal 10 administrative rule, the supporting statutes, as well as guidance provided per the DLCDC guidebook titled: Planning for Residential Growth (1997).

While ORS 197.296 specifically applies to cities with 25,000 or more population, this statute is generally followed to determine housing needs for Florence (2016 pop. 8,680). This analysis incorporates forecasts of future population growth in Florence based on data from Portland State University’s Population Research Center.

**Exhibit I.2: Florence HNA Methodology and Approach**



## I.C. REPORT ORGANIZATION

This report provides the technical basis of findings to support proposed economic development and housing policy recommendations. Each section of this report provides current data, assumptions and results that comprise all findings and conclusions:

**I. Introduction:** summarizes what’s considered when updating the economic and housing elements of Florence’s Comprehensive Land Use Plan.

**II. Trends and Forecasts:** provides an economic and demographic overview and summary of market trends influencing economic and housing growth in Florence.

**III. Employment Land Needs:** identifies market supportable growth and related employment land needs.

**IV. Residential Land Needs:** forecasts housing growth and residential land needs for various housing types.

**V. Buildable Land Inventory:** depicts vacant, part vacant and redevelopable land within the Florence UGB, and accounts for unbuildable land constraints. .

**VI. Reconciliation of Land Needs:** compares expected land demand to vacant land supply.



**VII. Community Preferences:** highlights input obtained from community outreach, interviews and surveys.

**VIII. Economic Development and Housing Goals, Objectives and Policy Recommendations:** identifies policies and objectives for addressing employment growth as well as housing needs.

## Section II. TRENDS AND FORECASTS

This section includes an analysis of economic trends and local competitive advantages according to prepared employment growth forecasts in accordance with OAR 660-009-0015(1-4). The analysis considers local economic development visions, goals, and objectives to inform the growth forecast.

### II.A. ECONOMIC OVERVIEW

FCS GROUP conducted an economic and market analysis of office, commercial, industrial, and public government development for the Florence area. This analysis focuses on the expected level of demand for new development related to job growth in the City over the next 20 years.

The United States (U.S.) economy is growing slowly since the last Great Recession. Trends indicate moderate growth in the U.S. gross domestic product (GDP), which is the dollar value of all goods and services produced. The U.S. economy is expected to realize a 2.2% annual year-over-year GDP growth in 2017 and a 2.2% year-over-year growth rate in 2018; compared with 1.5% experienced in 2015. (Exhibit II.1).

The U.S. Consumer Price Index (CPI) has also begun to increase consistently, with an increase of 1.3% experienced in 2016 while the CPI is expected to increase 2.5% in 2017 and 2.6% anticipated in 2018.

**Exhibit II.1: Global GDP Growth Projection**

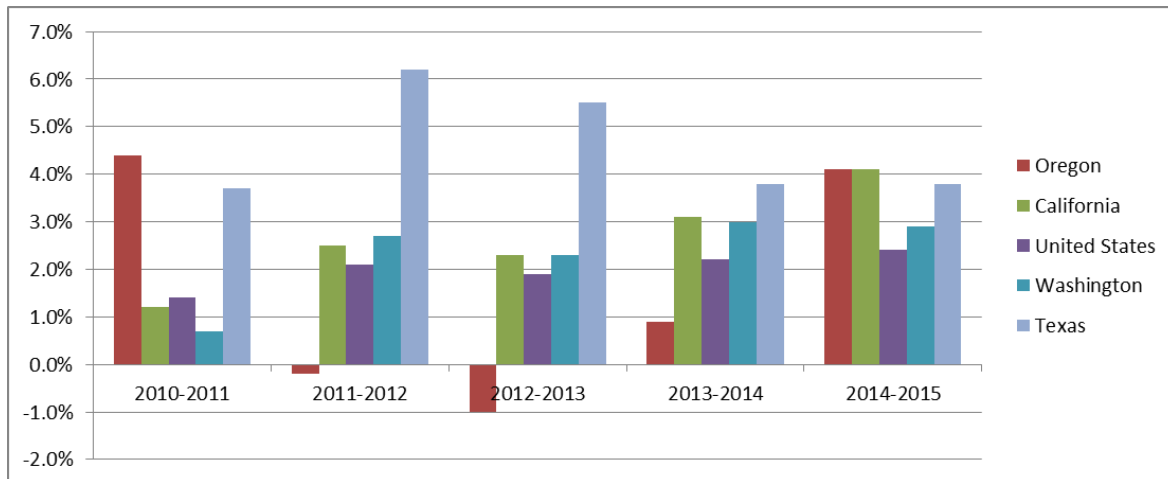
	GDP			CPI		
	2016	2017 est.	2018 proj.	2016	2017 est.	2018 proj.
Advanced Economies	1.7%	1.9%	2.1%	0.7%	1.8%	2.0%
<b>United States</b>	<b>1.5%</b>	<b>2.2%</b>	<b>2.2%</b>	<b>1.3%</b>	<b>2.5%</b>	<b>2.6%</b>
Eurozone	1.6%	1.6%	2.0%	0.2%	1.1%	1.5%
United Kingdom	2.0%	1.3%	2.1%	0.6%	1.9%	1.7%
Japan	0.6%	0.5%	0.7%	-0.1%	0.9%	0.7%
Korea	2.9%	3.1%	2.3%	1.0%	1.7%	2.0%
Canada	1.4%	1.9%	1.9%	1.5%	1.3%	1.8%
Developing Economies	4.1%	4.1%	4.3%	5.5%	4.9%	5.1%
China	6.7%	6.3%	5.6%	2.0%	1.8%	1.8%
India	7.6%	6.8%	7.7%	5.0%	4.3%	5.3%
Mexico	2.2%	-1.1%	2.0%	2.8%	4.4%	5.2%
Brazil	-3.5%	0.8%	2.1%	8.8%	5.0%	4.8%
Russia	-0.3%	1.5%	2.1%	7.1%	5.6%	5.6%

**Source:** Wells Fargo Bank, Forecast as of April 27, 2017. **Abbreviations:** CPI - Consumer Price Index, GDP - Gross Domestic Product

Compiled by FCS GROUP.

Oregon’s GDP has fluctuated significantly since the end of the Great Recession. According to the U.S. Bureau of Economic Analysis, the Oregon economy grew at the 22<sup>nd</sup> fastest rate in the U.S. since 2010 in terms of GDP growth (**Exhibit II.2**).

**Exhibit II.2: GDP Growth in Oregon, the United States and Select States**



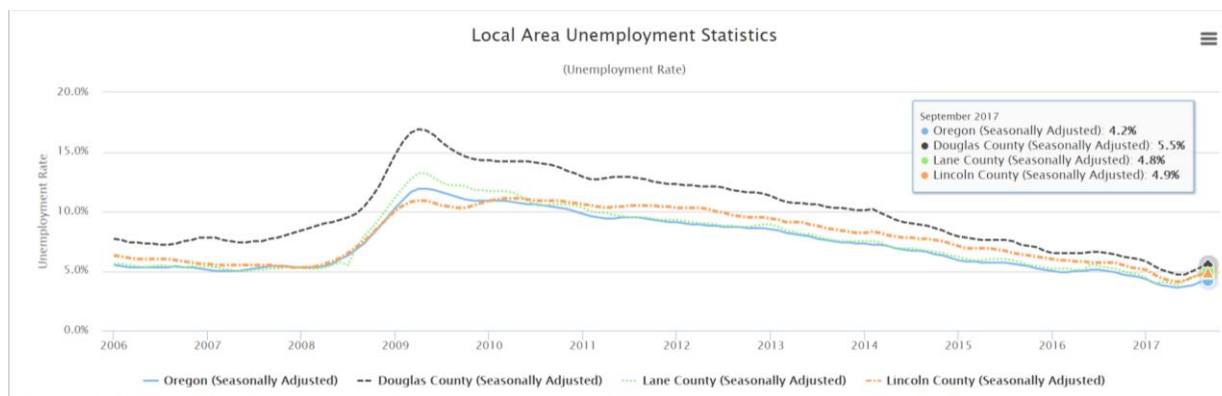
Source: US Bureau of Economic Analysis, Compiled by FCS Group.

Despite modest GDP growth for the state, many of Oregon’s counties are still recovering from the high unemployment brought on by the Great Recession.

Statewide unemployment rates peaked at a seasonally adjusted rate of 11.6% in May of 2009 before dropping to a historic low of 3.8% in March of 2017; then rising to 4.2% in September 2017 (**Exhibit II.3**). Lane County and other coastal counties have followed the state trend closely, consistently maintaining an unemployment rate slightly above the state average.

While Lane County’s unemployment rate largely mimicked the Oregon average, Oregon’s northern and central coastal counties saw lower peak unemployment but took much longer to return to pre-recession unemployment levels. Florence is a unique case. While it is a part of Lane County, its economic circumstances may more closely resemble those of coastal counties, such as Lincoln County which is 25 miles north of Florence.

**Exhibit II.3: Unemployment Rates, Lane County and Oregon (2006-2017)**



Since the unemployment rate is a measure of the percentage of workers between ages 15 and 64 that are actively looking for a job, it does not reflect factors regarding labor participation rates and under-employment (workers that have accepted low paying jobs since other jobs are not available locally). Labor participation rates (the share of civilian population that is employed or unemployed) have been decreasing nationally since 1998, and are slightly lower in Lane County (57%) compared with the state average (60%).

## II.B. POPULATION TRENDS

The economy of Florence is driven to a large degree by tourism and related visitor spending. Hence, the growth in population and visitation has a major bearing on local commercial and service employment.

National migration patterns point towards faster population growth for Oregon and the western U.S. than the nation as a whole. According to the U.S. Census Bureau, population increases in the West are projected to grow at an average annual rate of 1.6%, compared to 1.0% nationally over the next 20 years.

Over the last 16 years, population in Florence increased by 19.5%, up from 7,263 residents in 2000 to 8,680 in 2016. Florence's average annual growth rate (AGR) in population has fluctuated relative to the growth rates exhibited by Lane County as a whole (**Exhibit II.4**).

**Exhibit II.4: Population Trends (2000-2016)**

	2000	2010	2016	AGR 2000-2010	AGR 2010-2016
Florence	7,263	8,466	8,680	1.5%	0.4%
Lane County	322,959	351,715	365,940	0.9%	0.7%
Oregon	3,421,399	3,761,925	4,076,350	1.0%	1.3%

**Source:** U.S. Census Bureau and Portland State University Population Research Center.

**Abbreviations:** AGR = average annual growth rate

Compiled by FCS Group.

The Urban Growth Boundary (UGB) of Florence is expected to outpace Lane County's population growth rate, growing by 0.9% annually while the county is expected to grow 0.8% in the period between 2015 and 2035. Oregon is projected to grow by 1.1% annually during the same period (**Exhibit II.5**).

**Exhibit II.5: Population Projections (2015-2035)**

	2015	2020	2025	2030	2035	AGR
Lane County	361,474	378,335	394,921	410,247	424,117	0.80%
Florence UGB	10,486	11,116	11,714	12,219	12,554	0.90%
Oregon	4,013,845	4,252,100	4,516,200	4,768,000	4,995,200	1.10%

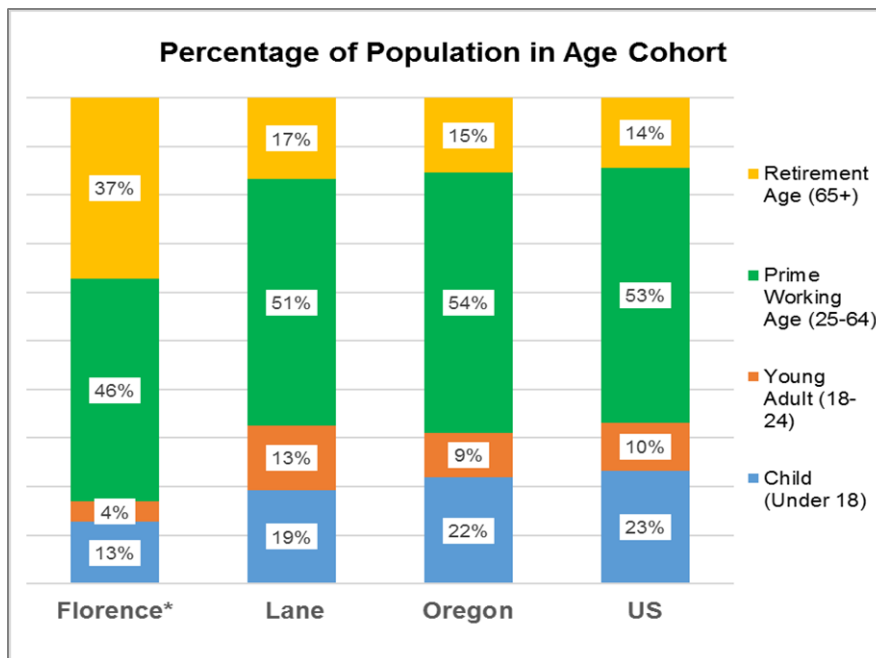
**Source:** Portland State University Population Research Center

Forecasts of Oregon's County Populations and Components of Change, 2010-2050.

Compiled by FCS Group. AGR = average annual growth rate.

Florence’s population growth is being tempered by the fact that it has a very high concentration of retirees. As indicated in **Exhibit II.6** and **Appendix B**, the percentage of retirement age people in Florence (37%) is over twice as high as Lane County (17%) and Oregon (14%). This is also evidenced by the median age of Florence residents (60.4) compared with Lane County (39.3).

**Exhibit II.6**



## II.C. INCOME AND EMPLOYMENT TRENDS

Income levels in Florence are below those of Lane County and the state, but the per capita income gap is closing. Between 1999 and 2015, per capita income for residents of Florence increased measurably, outpacing the County and the State in income growth. This may be attributed to a mix of very wealthy individuals that have chosen Florence as primary residence. Median household income has not followed Florence’s per capita income trend, having been outpaced by increases in Lane County, Oregon and the U.S. Nevertheless, increases in Florence’s local income came despite two recessions occurring during the 2000-2015 timeframe (**Exhibit II.7**).

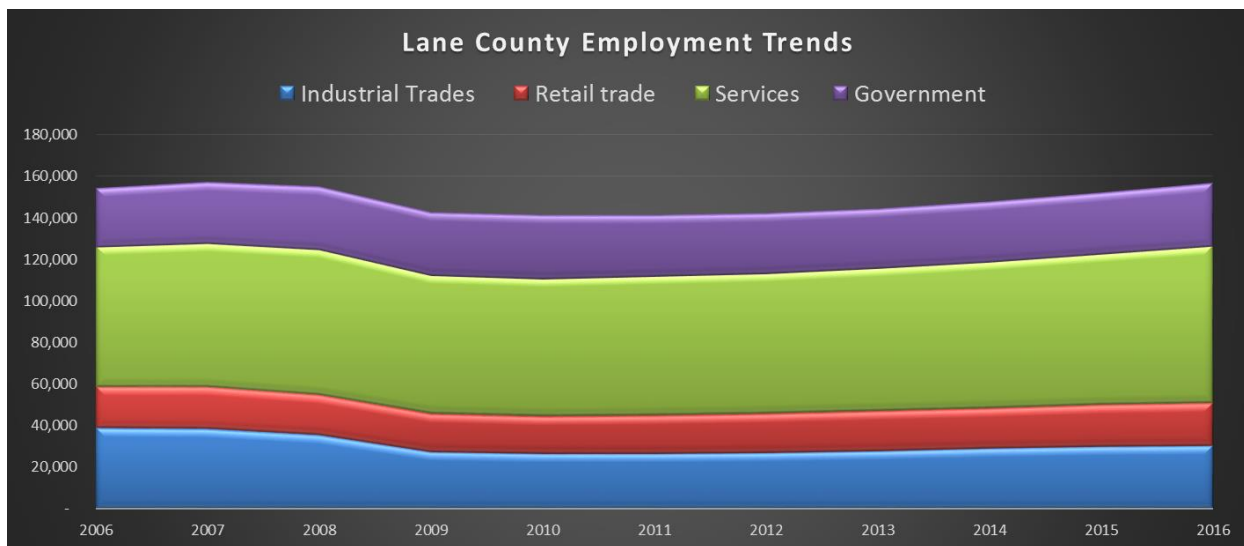
**Exhibit II.7 Income Trends**

		1999	2015	AGR
Median Household Income	<b>Florence</b>	<b>\$29,943</b>	<b>\$33,950</b>	<b>0.8%</b>
	Lane County	\$36,684	\$44,103	1.2%
	Oregon	\$40,818	\$51,243	1.4%
	U.S.A.	\$41,851	\$53,889	1.6%
Per Capita Income	<b>Florence</b>	<b>\$18,008</b>	<b>\$24,362</b>	<b>1.9%</b>
	Lane County	\$19,681	\$24,960	1.5%
	Oregon	\$20,940	\$27,684	1.8%
	U.S.A.	\$21,587	\$28,930	1.8%

Source: Census (in 1999 dollars) and 2015 ACS 5-year estimates  
 Compiled by FCS Group. AGR = average annual growth rate.

At the end of 2016, employment in Lane County finally reached above pre-recession levels recorded 10 years earlier. Since 2006, job growth has been particularly strong among services along with steady growth in the retail trade and government sectors. Over the past few years (2012-2016), employment has improved within all four major job sectors (**Exhibit II.8**). Employment estimates tend to understate the total number of employees that work in Lane County because the Oregon Employment Department job counts tend to exclude home-based workers and other workers that are not “covered” by unemployment insurance.

**Exhibit II.8 Lane County Covered Employment Trends**



Source: Oregon Employment Department; FCS GROUP.

Job growth within the City of Florence in recent years has been concentrated primarily in health care and retail sectors. The top employers in Florence include health care (Peace Harbor Hospital, Willamette Valley Cancer Institute), the Three Rivers Casino, assisted living facilities (Regency Florence and Spruce Point), local elementary and high schools and several commercial establishments (**Exhibit II.9**).

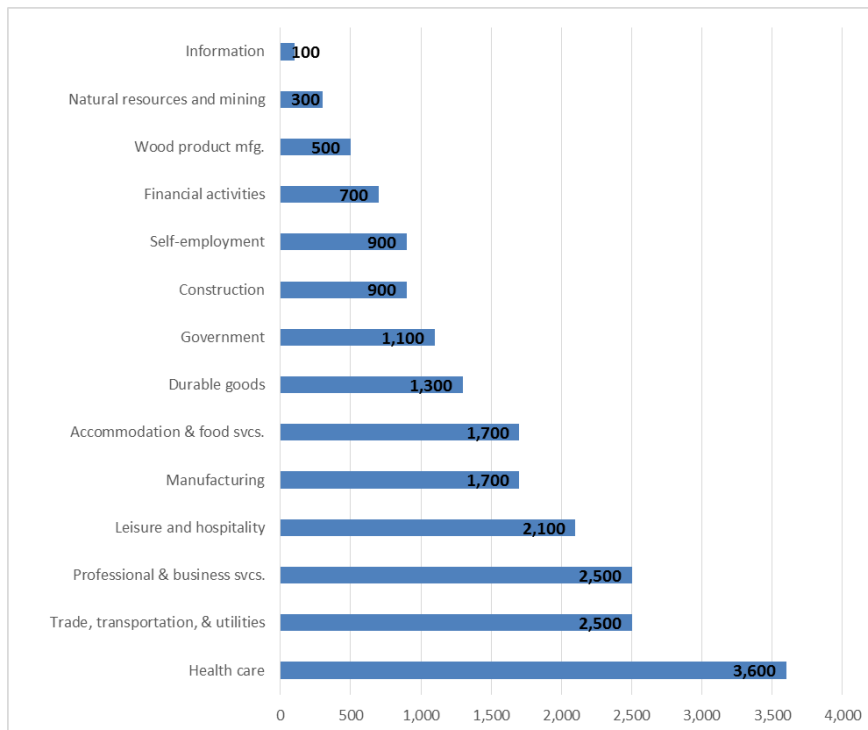
**Exhibit II.9: Top Employers in Florence Area**

	Employment
Peace Harbor Hospital	400-500
Three Rivers Casino	300-400
Fred Meyer	200-300
Safeway	100-150
Siuslaw Elementary	50-100
King R&R Logging	50-100
Regency Florence	50-100
Mo's Restaurant	50-100
Spruce Point	50-100
City of Florence	50-60
Siuslaw High School	40-50

## II.D. EMPLOYMENT GROWTH FORECASTS

The Oregon Employment Department prepares employment forecasts for “regions” throughout Oregon, and defines Lane County as a separate region. As shown in **Exhibit II.10**, the Lane County Region is expected to experience positive growth over the next 10 years in all job sectors, with the exception of the information and durable goods manufacturing sectors. The sectors that are projected to add the most net new jobs include: restaurants, services, education, federal/state government, construction, retail, natural resources (such as timber and fishing), hospitals and independent contractors.

**Exhibit II.10: Projected Lane County Job Growth by Industry 2014-2024**



**Source:** Oregon Employment Department. Compiled by FCS Group.

## II.E. LOCATION QUOTIENT ANALYSIS

Location quotient (LQ) analysis is a method of determining which business sectors are clustered in the City of Florence in comparison to the Oregon state average. LQ analysis reveals what makes the local economy “unique” in comparison to a broader geography. The LQ analysis indicates existing and potential emerging business clusters present in Florence based on their size (as measured by employment) and projected growth potential. The data used for the cluster analyses were derived from the Oregon Employment Department 2015 wage and salary employment statistics and the Lane County job growth projections described previously applied to City of Florence current employment estimates.

Business clusters in Florence with high LQs include health care and social assistance, accommodations and food services, education services, and arts, entertainment and recreation. For example, the health care sector, a cluster which includes Peace Harbor Hospital and Regency Florence, has an LQ of 2.0 which signifies that this business cluster is twice as concentrated in Florence than the statewide average (**Exhibit II.11**).

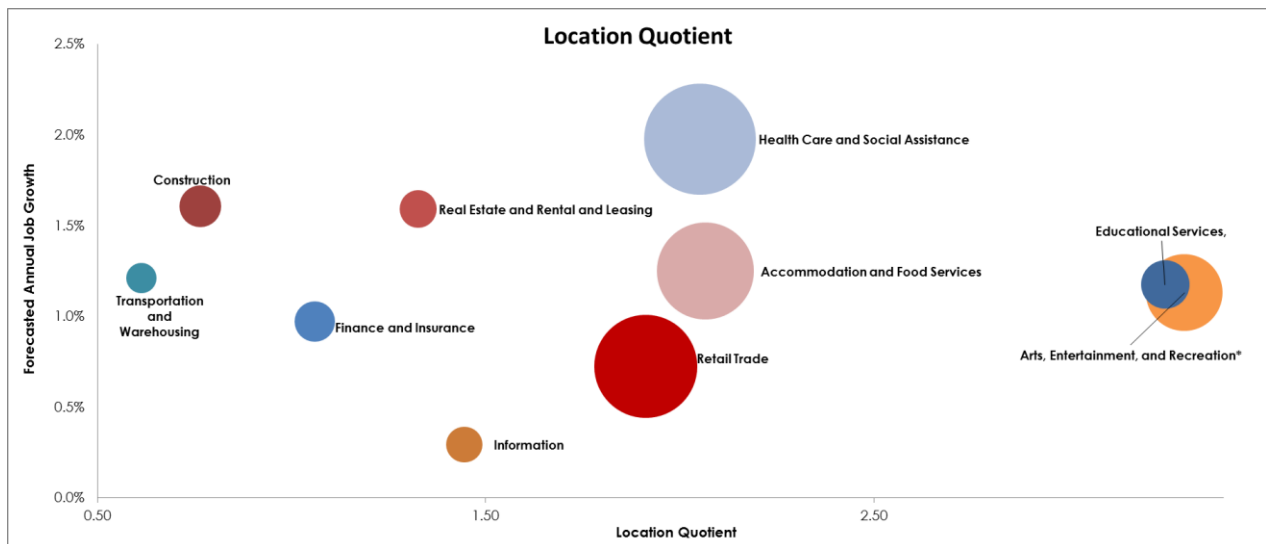
Clusters with less than 1.0 LQ may represent a business cluster with either a competitive disadvantage (e.g., from lack of access to key markets) or business clusters with pent-up demand. Clusters with pent-up demand may represent “emerging” opportunities if the job growth rate is projected to be higher than average. For example, the construction cluster has a 0.77 LQ and a high job growth forecast (1.6% annually) so it may now be in position to expand if local employment sites and workforce training opportunities are provided locally.

The LQ analysis for Florence identifies several potential target business clusters, including:

- **Arts, entertainment and recreation** (cluster with high LQ and 1.1% annual job growth forecast) could represent expansion of casino-related entertainment, artist/writers’ galleries and workshops, and destination-oriented recreation (e.g., golfing and activities related to Oregon Dunes National Recreational Area).
- **Accommodations and food services** (high LQ cluster expected to support new hotels and restaurants).
- **Retail trade** (significant cluster with high LQ could include additional establishments to capture retail sales outflow).
- **Health care and social assistance** (highest employment cluster in Florence which also claims the highest projected annual job increases) captures both hospital and retirement-related employment, both industries which Florence has excelled at attracting.
- **Real estate and rental** leasing (sector with significant projected growth which may require new office locations or home based businesses for professionals).



**Exhibit II.11: Industry Cluster Location Quotients and Forecasted Growth, Florence Area**



**\*Note:** the LQ for Arts, Entertainment, and Recreation is 9.1 but is represented at 3.3 here to maintain legibility of this graph.

Compiled by FCS Group based on Oregon Employment Department data from 2015.

## II.F. TOURISM MARKET

Visitor spending continues to be a bright spot along the central and north coast of Oregon. Florence enjoys access to abundant recreational areas, such as the Oregon Dunes National Recreation Area, Siuslaw National Forest, and the Siuslaw River. Major attractions also include Three Rivers Casino and hotel as well as local restaurants and bars. The US 101 corridor is an Oregon Scenic Byway and an “All-American Road.” Florence is also home to major events including the Rhododendron Festival and the Winter Music Festival, which draw thousands to the local area.

**Exhibit II.12** depicts trends in visitor spending within Western Lane County between 2009 and 2015. Trends show visitor spending in Western Lane County reached record levels in 2015--at \$110.1 million up 3.8% from the prior year.

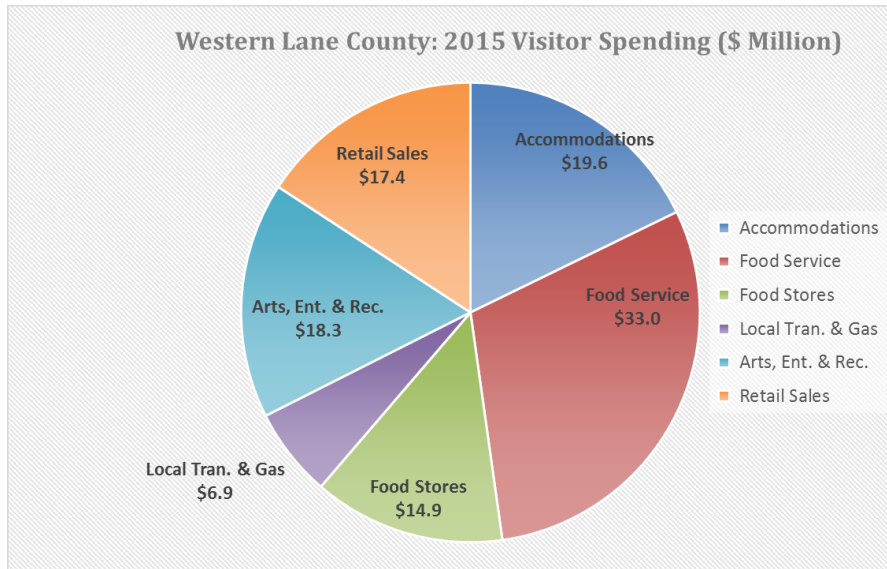
**Exhibit II.12: Western Lane County Visitor Spending By Category in Millions (2009-2015)**

	2009	2010	2011	2012	2013	2014	2015
Accommodations	\$ 14.8	\$ 15.3	\$ 15.2	\$ 15.3	\$ 16.7	\$ 17.8	\$ 19.6
Food Service	\$ 25.3	\$ 25.6	\$ 25.6	\$ 26.5	\$ 29.2	\$ 31.2	\$ 33.0
Food Stores	\$ 12.3	\$ 12.1	\$ 12.4	\$ 12.7	\$ 13.6	\$ 14.3	\$ 14.9
Local Tran. & Gas	\$ 6.2	\$ 7.1	\$ 8.2	\$ 8.2	\$ 8.4	\$ 8.2	\$ 6.9
Arts, Ent. & Rec.	\$ 15.8	\$ 15.6	\$ 15.3	\$ 15.4	\$ 16.8	\$ 17.6	\$ 18.3
Retail Sales	\$ 15.1	\$ 15.2	\$ 15.2	\$ 15.4	\$ 16.5	\$ 17.0	\$ 17.4
<b>Total</b>	<b>\$ 89.5</b>	<b>\$ 90.9</b>	<b>\$ 91.9</b>	<b>\$ 93.5</b>	<b>\$ 101.2</b>	<b>\$ 106.1</b>	<b>\$ 110.1</b>

Source: Dean Runyan Associates "Oregon Travel Impacts" May 2017. Compiled by FCS Group

**Exhibit II.13** illustrates the distribution of tourism spending in Western Lane County in 2015 and underscores the economic benefits received by business types including: restaurants, hotels, retail stores, arts and entertainment, food stores, and auto service centers.

**Exhibit II.13: Lane County Visitor Spending By Category in Millions (2015)**



**Source:** Dean Runyan Associates "Oregon Travel Impacts" May 2017.

## II.G. BUSINESS OPENINGS AND CLOSURES

Florence has witnessed several business openings/expansions over the past four years. The business activity listed in **Exhibit II.14** reflects diverse industries ranging from food service establishments to schools and health care establishments. Over the past four years, ten businesses have opened, one has expanded, and four establishments closed.

**Exhibit II.14: Florence Business Openings & Closures, August 2014 to June 2016**

	Business Name	Date
<b>Openings</b>	Florence Tech Solutions	1/17/2017
	Wildflower Montessori School	8/16/2016
	Class Act Theater	7/1/2016
	Early Learning Florence	11/24/2015
	Alice Brauer Christian (ABC) Preschool	7/24/2015
	Novelli's Crab and Seafood Market	7/14/2015
	Oregon Coast Military Museum	7/7/2015
	Sand Ranch Rock Shop	6/30/2015
	Peace Harbor Medical Center*	9/23/2014
	<b>Closures</b>	Real Food Co-op

**Source:** Oregon Employment Department

\* Denotes that a firm is expanding

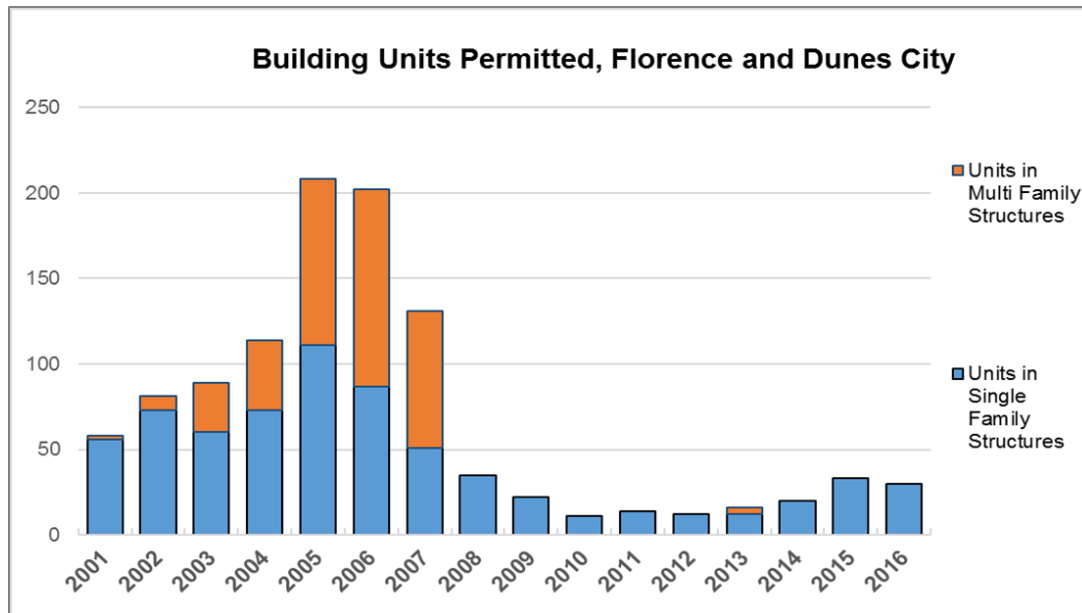
Compiled by FCS Group.

December 2017

## II.H. BUILDING PERMIT ACTIVITY

New building construction in Florence and Dunes City continues to be dominated by single family housing. Over the past few years the City has issued 30-33 building permits per year, which is down significantly from pre-recession peak activity of 200+ permits in 2005-2006 (see **Exhibit II.15** and **Appendix C**).

**Exhibit II.15**



Source: City of Florence.

## II.I. RETAIL DEVELOPMENT POTENTIAL

The existing retail inventory in Florence is predominantly concentrated along Highway 101 and in Old Town. Highway 101 corridor includes several shopping centers, auto-services, and destination stores (such as Fred Meyer, Safeway and Rite-Aid). Old Town includes waterfront-oriented restaurants, boutique stores, lodging and a mix of housing types. Current vacancy rates for retail space in Florence is estimated at 10 percent of available inventory.

FCS GROUP conducted an analysis of retail sales data to identify existing retail trade flows within the Florence market area. The analysis examines the consumer retail demand and existing estimated sales within the City of Florence as well as an analysis of 15, 30 and 45 minute drive time of Florence (to/from city hall).

The retail trade flow analysis measures the difference between potential sales from resident demand within the footprint of the analysis area and the actual sales in the same area. The retail trade analysis summary shown in **Exhibit II.16** displays an examination of retail trade in and around the City of Florence. This analysis suggests that Florence is a hub for food-service establishments with significant tourism spending, as well as a regional commercial center for residents within a 30 minute

drive. In 2016, the City of Florence experienced a net retail inflow of nearly \$27 million in overall retail sales, including \$12.5 million in food and beverage spending (**Exhibit II.16**).

**Exhibit II.16: Florence Retail Market Trade Area Profile, 2016**

	Trade Area			
	City Limits	15 minutes	30 minutes	45 minutes
Population	9,136	13,001	16,104	22,369
Households	4,540	6,391	7,888	10,829
Aggregate Income	\$230,757,088	\$337,414,953	\$412,648,896	\$567,792,327
<b>Total Retail Demand and Sales (Supply) within Trade Area</b>				
Demand	\$124,225,180	\$183,824,945	\$219,348,072	\$316,806,306
Supply	\$151,194,784	\$155,722,944	\$187,056,588	\$239,775,947
Retail Trade Outflow/(inflow)	<b>(\$26,969,604)</b>	<b>\$28,102,001</b>	<b>\$32,291,484</b>	<b>\$77,030,359</b>
<b>Food &amp; Drink Demand and Sales (Supply) within Trade Area</b>				
Demand	\$11,417,079	\$16,720,296	\$20,525,774	\$28,280,345
Supply	\$23,910,105	\$25,164,110	\$32,916,645	\$39,374,952
Retail Trade Outflow/(inflow)	<b>(\$12,493,026)</b>	<b>(\$8,443,814)</b>	<b>(\$12,390,871)</b>	<b>(\$11,094,607)</b>

Despite an overall retail trade inflow, the detailed trade flow analysis of individual store groups provided in **Appendix C** indicates that the following store groups have relatively high levels of retail outflow, which means most local residents travel outside the City to make purchases:

- Food and Beverage Stores (includes grocery and specialty food stores)
- Building Materials, Garden Equipment & Supply Stores
- Electronics and Appliance Stores
- Motor vehicle sales, auto parts and supply stores

If half of the current retail sales outflow in these categories (see analysis in **Appendix C-1**) can be captured locally by new commercial development, then the added development potential from intercepting trade outflow would be approximately 52,000 square feet of building floor area, plus additional building/sites for motor vehicle sales.

In addition to retail development needed to intercept current trade outflow, future increases in spending from visitors along with new residents would support additional commercial development. The analysis provided in **Appendix C-2** indicates that as future population and visitation levels increase, future growth in retail spending should support an additional 90,000 to 100,000 square feet of retail floor area.

While online retail purchases continue to increase (annual online sales were up 14.3% in 2016 nationally) according to the U.S. Census Bureau, these sales account for less than 5% of total retail demand in the City of Florence (based on data provided in **Appendix B**). It is expected that online sales will continue to increase in the future; leading to additional demand for sub-regional warehouse/distribution buildings (and related jobs) in Florence.

## II.J. LODGING DEVELOPMENT POTENTIAL

As tourism increases along the Oregon Coast so too will demand for overnight accommodations. An analysis of the lodging market within Florence indicates that the market is currently served by 13 “competitive” lodging establishments, including 4 full-service hotels and 9 limited-service facilities (**Exhibit II.17**).

In addition, it is estimated that there are at least 62 short-term rentals (bedrooms) that are currently available through various websites, such as Air B&B. The number of homes and condos being utilized for shared arrangements, such as Air B&B, has increased significantly since 2010. FCS GROUP estimates that this short-term rental segment currently accounts for approximately 11,315 annual room nights of demand, which equates to 7% of total annual room night demand in Florence.

#### Exhibit II.17:

##### Existing Overnight Accommodations in Florence UGB

Accommodation Type	Facilities	Rooms	Est. Avg. Annual Occupancy Rate	Annual Room-night demand
Hotels with Meeting Facilities	4	315	70%	80,483
Other Hotels/Motels/B&Bs	9	285	70%	72,818
Short-term/Air B & B rooms*	n/a	62	50%	11,315
<b>Total</b>	<b>13</b>	<b>662</b>		<b>164,615</b>

**Source:** Hotels.com and Air B&B.com, survey by FCS GROUP (see Appendix C).

\* assumes room count found on the internet represents 50% of total inventory.

FCS GROUP evaluated local lodging demand by market segment, including: tourists/visitors, groups (organized events, weddings, conventions) and business travelers. Each segment's growth is based on the trends and forecasts that have been described in previous sections of this report (**Exhibit II.18**).

#### Exhibit II.18: Lodging Demand Segments

Demand Segment	Annual Growth Rate	Source
Visitors	3.51%	Dean Runyan Travel Impacts in Western Lane County: 2009 to 2015, real dollars
Groups	1.10%	Oregon Office of Economic Analysis pop. proj. for Oregon
Business Travelers	1.08%	OED 2014-2024 Job Forecast for Lane County

The lodging demand analysis indicates that over the next 20 years there will be demand for approximately 570 new hotel/motel rooms in Florence (see **Exhibits II.19-22**). This level of demand would likely support one new conference hotel along with 2-3 smaller budget or boutique hotels. If the existing lodging supply is not expanded to accommodate increases in demand, there will be market pressure to convert single family dwellings to short-term rentals. However, the potential supply of permitted short-term rental units would be subject to City policy regulations.

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**Exhibit II.19: Existing and Future Lodging Demand**

Lodging Type	Visitors	Groups	Business Travelers	Total
With Meeting Facilities	65%	20%	15%	100%
Without Meeting Facilities	95%	0%	5%	100%

**Exhibit II.20: Estimated 2016 Room-Night Demand by Lodging Type**

Lodging Type	Visitors	Groups	Business Travelers	Total
With Meeting Facilities	52,314	16,097	12,072	80,483
Without Meeting Facilities	69,177	0	3,641	72,818
<b>Total</b>	<b>121,490</b>	<b>16,097</b>	<b>15,713</b>	<b>153,300</b>

**Source:** Hotels.com and Hotel Staff; compiled by FCS Group.

**Exhibit II.21 Projected 2035 Room-Night Demand by Lodging Type**

Lodging Type	Visitors	Groups	Business Travelers	Total
With Meeting Facilities	104,351	20,033	14,956	139,340
Without Meeting Facilities	137,988	0	4,510	142,498
<b>Total</b>	<b>242,338</b>	<b>20,033</b>	<b>19,466</b>	<b>281,838</b>

**Source:** Hotels.com and Hotel Staff; compiled by FCS Group.

**Exhibit II.22: Projected 2035 Lodging Demand**

Existing Lodging Rooms	Net New Room-Night Demand	Total Supportable Rooms*	Net New Supportable Rooms*	% Needing Meeting Facilities
600	128,538	1,174	574	49%

**Source:** \* assumes 70% minimum required average annual occupancy; FCS GROUP.

**II.K. INDUSTRIAL & OFFICE POTENTIAL**

There has been limited office and industrial construction activity in Florence over the past 10 years. Office and industrial building vacancy rates appear to be approximately 10-15 percent, with at least 10 available buildings and several “build to suit” commercial and industrial parcels for sale or lease in Florence.

Future office job growth in Florence will likely be attributed to service businesses (such as health care, accounting and financial services) and expanding small businesses. Levering the Oregon state-backed Regional Accelerator and Innovation Network (RAIN) program, which helps fund startups, along with the development of a small business incubator facilities would help foster local business growth.

Potential industrial job growth in Florence over the next 20 years is more limited than office/service job growth. Near-term market potential currently exists for a cluster of light industrial artisan “maker” businesses that could be located in an adaptive reuse building. This development opportunity should allow light manufacturing activities to occur along with shared gallery showrooms and classroom training/event space.

Larger-scale industrial developments, such as value-added wood product manufacturing (such as production of prefabricated buildings, flooring, siding, etc.) and wholesale distribution activities are expected to require a range of industrially-zoned sites.

The Florence Airport also provides a unique opportunity for additional aviation related events, activities and businesses engaged in aviation component assembly, research and development.

## II.L. RECOMMENDED TARGET BUSINESS CLUSTERS

Based on the previous analysis and findings, several economic opportunities have been identified that are consistent with market trends and community development objectives. Target business opportunities are summarized in **Exhibit II.23** and include:

- **Outdoor Gear/Recreation:** capitalizing on Florence’s unique location, the Outdoor Gear/Recreation cluster is a natural fit and a way to enhance off-peak visitation. A mix of indoor and outdoor recreational facilities could help retain and attract new businesses and young professionals to Florence. Business concepts include: ATV research and testing center; eco-tours on kayaks and stand up paddle boards; and strategies that link local outdoor gear businesses with national and international markets.
- **Craft Food/Beverage:** as an outgrowth of the artisan maker movement, the craft food and beverage industry can leverage the talents of many local employers. Business concepts include development of a brew pub or distillery, marketplace (think mini Pike Place Market) for locally produced products, and workforce training partnerships with Lane Community College and local high school training programs. The potential to combine locally produced foods (such as seafood, shellfish, seaweed, cranberries, etc.) with specialized food product research and development activities could provide a future cluster of food production establishments in Florence.
- **Software/Information Technology:** in response to an ever increasing global society linked by internet communications, Florence can capitalize on its high quality of life, low cost of living (compared to west coast) and proximity to the University of Oregon to attract individuals and businesses that can work remotely. The software/IT cluster requires high-speed internet fiber optic communications, and a progressive business network of creative workers.
- **Forest Products and Modular Homes:** while regional timber harvests have declined over the past few decades, the region retains its strong heritage in forest product research and development. Value-added forest products, such as cross-laminated timber (CLT) and building components (such as trusses, flooring, siding, doors, windows) could be manufactured in Florence along with modular home construction. These activities would likely require industrial-zoned sites ranging from 5 to 10 acres in size.
- **Health Care Services:** includes Peace Health hospital expansion and specialty treatment centers along with supporting medical office professions, in-home nursing care, etc. as an established

location for retirees with full-service health care provided by Peach Health Medical Center and other health service establishments, Florence is well positioned to attract new facilities that offer a wide range of treatment or care. This could include destination outpatient treatment centers for cancers, non-invasive surgery, cataract surgery, etc.

- **Entrepreneurs:** this includes home-based businesses and small office buildings that can accommodate growing small businesses, such as software development, media arts, environmental consulting, legal and accounting professionals. The current RAIN incubator program and Lane Community College training programs would also help foster business growth and local job creation.
- **Lodging:** new and/or expanded overnight accommodations will be needed to accommodate growth in visitation, group meetings/events and business demand from overnight travelers. New facilities that accommodate events and trade association conventions could augment demand, particularly during off-peak shoulder months.
- **Continuing Care Facilities:** With the presence of Peace Health Medical Center, high quality of life ratings, and relatively low cost of living, additional demand for retirement housing communities, Alzheimer's care facilities and assisted living facilities is expected, particularly full-service facilities that provide services, such as:
  - Physical therapy
  - Personal concierge
  - Restaurant dining
  - Medication management
  - Transportation services
  - Nursing care
  - Cleaning services
  - Cultural, spiritual, and educational events
- **Artisan Makers:** includes arts-related businesses that require light industrial/flex buildings for specialty manufacturing operations (glass making, cabinet making, food/beverage processing) as well as gallery/showrooms and related training/event space. Such businesses prefer to cluster in adaptive reuse buildings near Old Town given its high levels of pedestrian/tourism traffic.



**Exhibit II.23: Recommended Target Uses for Florence**

Florence Economic Development Strategy Target Employment Clusters				
Target Use	Market Potential	Relative Wage Rates	Potential Job Creation	Recommended Target Market in Prior 2016 Strategy
Outdoor Gear & Recreation	●	●	●	<input checked="" type="checkbox"/>
Craft Food/Beverages	●	●	●	<input checked="" type="checkbox"/>
Software/Information Technology	●	●	●	<input checked="" type="checkbox"/>
Forest Products	○	●	○	<input checked="" type="checkbox"/>
Health Care Services	●	●	●	<input type="checkbox"/>
Entrepreneurs	●	○	○	<input checked="" type="checkbox"/>
Lodging	●	●	●	<input type="checkbox"/>
Continuing Care Facilities	●	●	●	<input type="checkbox"/>
Artisan/Makers	●	●	●	<input type="checkbox"/>
Legend: Good: ● Fair: ● Poor: ○				

Source: FCS GROUP based on EOA findings and Committee input.

# Section III. EMPLOYMENT LAND NEEDS

## III.A. JOB GROWTH SCENARIOS

With input from the HEOP committee, the consultant team prepared two employment land needs growth scenarios for Florence. Each scenario takes into account Oregon Employment Department (OED) 2014-2024 extrapolated long-term growth forecasts for job sectors applied to the most current existing Florence UGB job estimates. Please see **Appendix D** for detailed job growth scenarios and assumptions.

- **Baseline Growth Scenario A:** assumes that the existing employment in Florence will grow at an AGR (average annual growth rate) consistent with the OED long range job growth forecast for Lane County, which includes the Florence UGB.
- **Strategic Growth Scenario B:** assumes that the baseline growth forecast derived from Scenario A is supplemented by strategic growth in the target business clusters discussed previously. More specifically, this scenario assumes Scenario A job growth plus 100 additional traded sector industrial jobs and 144 additional pent up commercial jobs from capture of existing trade outflow.

As summarized in **Exhibit III.1**, the baseline job growth projections for the Florence UGB over the next 20 years includes 1,082 net new jobs (Scenario A). In addition to this baseline growth, Scenario B assumes an additional 100 industrial jobs and 104 retail jobs are added above the baseline forecast, with 1,286 net new jobs in Scenario B. Under either scenario, most new job growth would likely occur in “health care & social service” sector, followed by “other services” and “food/lodging services.”

**Exhibit III.1: Florence UGB 20-Year Job Growth Forecast**

Job Sector	2015 Jobs	AGR (baseline)	2035 Jobs (baseline)	20-year	20-year
				Baseline Job Growth (Scenario A)	Strategic Job Growth Forecast (Scenario B)
Industrial	259	1.31%	336	77	177
Retail	741	0.73%	856	115	219
Health Care & Social Services	874	1.98%	1,293	419	419
Food/Lodging Services	663	1.25%	850	187	187
Educational Services	165	1.18%	208	43	43
Public Administration	86	0.38%	93	7	7
Other Services	965	1.09%	1,199	234	234
<b>Total</b>	<b>3,753</b>	<b>1.28%</b>	<b>4,835</b>	<b>1,082</b>	<b>1,286</b>

**Source:** Oregon Emp. Dept. (OED, 2015); projections based on OED long range employment sector growth forecasts for Lane County; FCS GROUP.

**Abbreviations:** AGR = annual average growth rate. UGB = urban growth boundary.

### III.B. LAND NEEDS AND REDEVELOPMENT ASSUMPTIONS

Based on the job growth forecasts shown above, the Florence UGB will require at least 39 acres of net buildable vacant land in Scenario A and nearly 55 acres in Scenario B (**Exhibit III.2**).

As described in **Appendix E**, these vacant land requirements are based on the job growth forecasts described above and assume that existing underutilized buildings (infill) and redevelopment sites accommodates between 8% and 9% of the net new job growth, which equates to approximately 46,000 SF of infill/redevelopment building floor area in Scenario A and 53,000 SF in Scenario B.

**Exhibit III.2: Florence 20-Year Vacant Land Needs for Employment (buildable acres)**

Job/Use Type	Scenario A (Base Case)	Scenario B (Strategic Growth)	Recommended Site Requirements for Scenario B	Preferred Zoning
<b>Private Employment</b>				
Industrial Services	8.4	19.3	Two 5-10 acre parcels, plus five 1 to 3 acre parcels; full infrastructure services	Industrial Emp
Lodging	3.5	3.5	Three 1 to 3 acre parcels, with good visibility	Com or Mixed Use
Food Services	4.7	4.7	Infill sites plus specialty food store on 2-acre site	Com or Mixed Use
Education Services	2.6	2.6	One 2-3 acre parcel with transit access	Emp or Public
Office/Other Services	15.5	15.5	Infill sites plus incubator facility (1 acres sites)	Emp or Mixed Use
Retail	4.6	9.2	One 5-6 acre shopping center plus infill sites	Commercial
<b>Private Subtotal</b>	<b>39.3</b>	<b>54.9</b>		
<b>Government</b>	-	-	2-acre parcel, emergency access	Public
<b>Total</b>	<b>39.3</b>	<b>54.9</b>		

Source: derived from Appendix E.

### III.C. SITE REQUIREMENTS

If the City aims to attain the most positive job growth forecast embodied by Scenario B, most employment land needs would consist of industrial and commercial (retail, office and mixed-use zoned) land.

Industrial uses would require nearly 20 acres of land area, for several small and a few large employers. Small to medium traded-sector manufacturing businesses would benefit from land zoned for industrial with ancillary retail or commercial showroom areas. Artisan “maker” businesses could be accommodated in a shared adaptive reuse building or in industrial flex buildings (e.g., 12,000 square foot single level tilt-up buildings).

Services would primarily consist of 1-2 level commercial buildings with a mix of professional and health service occupations, plus locations for lodging and food service establishments.

It is anticipated that up to 574 new lodging rooms would be needed over time. It is likely that each hotel would require a site of 1 to 2 acres and have between 60 and 120 rooms.

Retail and food service establishments could be accommodated through a mix of infill and redevelopment along with one additional grocery-store anchored shopping center on a 5-6 acre site.

In addition to many home-based businesses, Florence should plan for a few 1-2 level office buildings as part of a professional center with a mix of health care and business services. Business services, such as insurance, real estate, finance, accounting and consulting may also be accommodated as part of a new retail shopping center.

A public or non-profit incubator building should be planned with the goal of accommodating 6-10 startup businesses at any given time. This facility would likely require 5,000 to 7,000 SF of floor area and could be part of an adaptive reuse or infill development project.

Government uses reflected in this analysis pertains primarily to public safety occupations such as police and fire, which may require additional space needs over time. The need for other public or community facilities, such as schools and parks facilities have not been evaluated at this time.

### III.D. SPECIAL SITING LAND NEEDS

These employment growth scenarios (Scenario A and B) reflect expected land demand generated by private and City government job growth but do not include potential land needs attributed to special siting requirements for major facilities, such as schools, parks and institutional development (including churches). It is possible that the HEOP or City Council may identify such uses as “special siting uses” which would augment the projected UGB land requirements stated above.

## Section IV. RESIDENTIAL LAND NEEDS

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This chapter presents the housing needs analysis (HNA) for Florence. This analysis addresses the requirements for planning needed housing in urban areas for small cities (population less than 25,000) using the methodology described earlier in Section I.

### IV.A. FLORENCE HOUSING MARKET POTENTIAL

Florence's future housing need must address planned growth requirements for households at all income levels. This entails understanding the demand generated by "permanent" population (owner and renter) households along with seasonal housing demand. The issue of housing affordability and the demand for workforce housing must also be addressed.

#### Steps in the Housing Needs Analysis

The method used in this HNA is consistent with Oregon Land Use Goal 10 requirements for small cities and comports with most of the requirements used for larger cities as well. The key steps include:

Step 1 – Describe demographic characteristics of the population that relate to housing tenancy (owner and renter households).

Step 2 – Identify national, state and local demographic and economic trends and factors that may affect the demand for different housing types.

Step 3 – Forecast the amount of resident population and households expected over the next 20 years for Lane County and Florence. This HNA includes two population growth scenarios.

Step 4 – Determine the types of housing that are considered "attainable" or affordable based on household income.

Step 5 – Estimate the number of additional required housing units for permanent households and seasonal residents by structure type.

Step 6 – Determine the "base scenario" buildable land needs for housing types and land use designation, based on ranges in net density by structure type.

Step 7 – Consider an additional scenario which takes into account local policies that support increased development of workforce housing, and policies that cap the amount of housing that is used as short-term rentals.

According to ORS 197.307, "needed housing" refers to housing types that meet the need for housing within an urban growth boundary at particular price ranges and rent levels, and must include the following types:

- Attached and detached single family and multifamily housing for owners and renters.
- Government assisted housing.

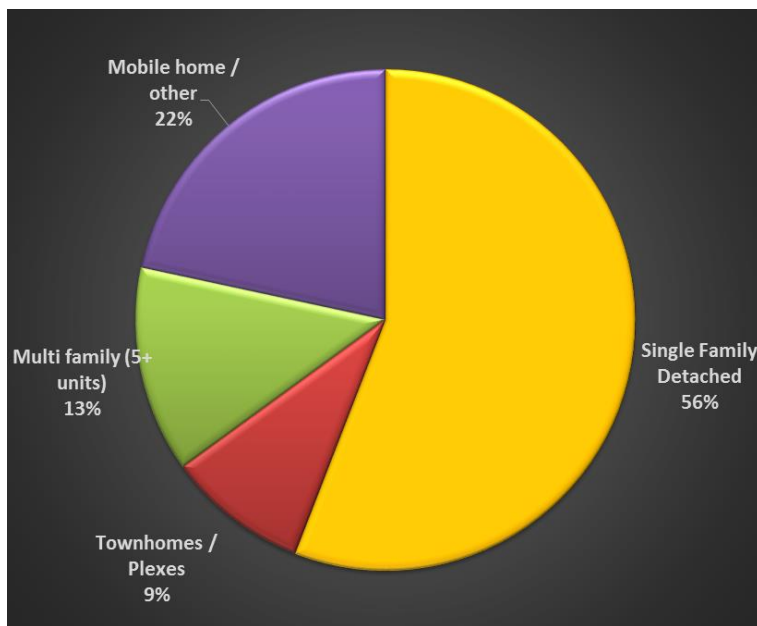
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- Mobile home or manufactured homes (as part of dwelling parks).
- Manufactured homes on individual lots planned and zoned for single-family residential use that are in addition to lots within designated manufactured housing parks.
- Housing for farmworkers (note, farmworker housing is not considered applicable to this effort since there are no current farms or farmworker housing units that exist within the city).

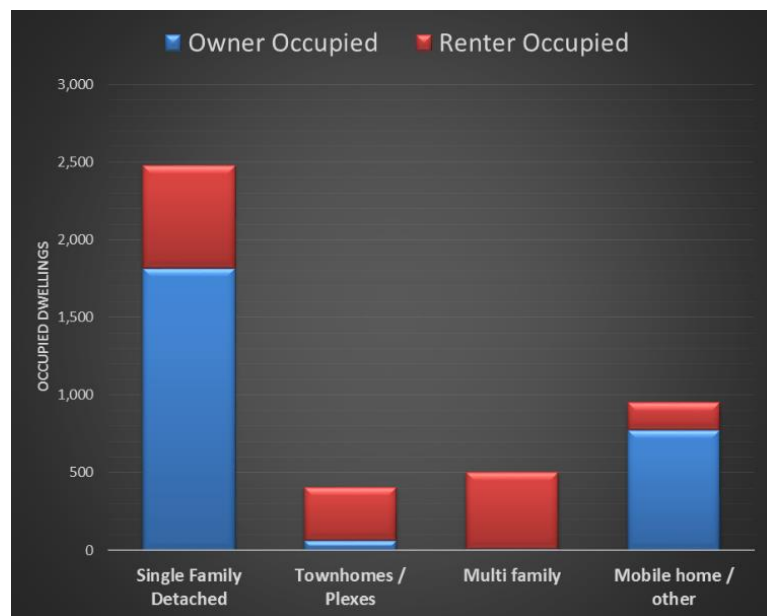
### Existing Housing Inventory and Tenancy

The current housing mix in Florence consists of primarily of single family detached homes, with 56% of the total housing stock. Multifamily housing accounts for 13% of the housing inventory. Townhomes/plexes (includes duplex, tri-plex and quad-plex buildings) and mobile homes (includes manufactured housing parks) each account for 9% of the housing inventory. Among permanent residents, owner-occupied housing is concentrated in the single family detached and mobile home/manufactured home parks (see **Exhibit IV.1**).

#### Exhibit IV.1: Florence Existing Housing Mix and Tenancy



**Source:** U.S. Census, American Community Survey, 2015.



Source: U.S. Census, American Community Survey, 2015.

According to the American Community Survey (ACS), there were 5,266 housing units in Florence in 2015 (most recent data available). As indicated below in **Exhibit IV.2**, the housing inventory is predominantly registered as owner-occupied dwellings with a significant portion of renter-occupied dwellings, the remaining structures are second homes/short-term rentals.

**Exhibit IV.2: Florence Existing Housing Characteristics**

Housing Type	Owner-Occupied Dwelling Units	Renter-Occupied Dwelling Units	Second Homes & Short Term Rentals	Other Vacant Units	All Dwelling Units
Single Family Detached	1,817	658	365	164	3,004
Townhomes / Plexes	65	341	61	33	500
Multi family (5+ units)	9	491	182	78	760
Mfg. home / other	774	176	-	52	1,002
<b>Total Units</b>	<b>2,665</b>	<b>1,666</b>	<b>608</b>	<b>327</b>	<b>5,266</b>
Distribution	51%	32%	12%	6%	100%

Housing Type	Owner-Occupied Dwelling Units	Renter-Occupied Dwelling Units	Second Homes & Short Term Rentals	Other Vacant Units	All Dwelling Units
Single Family Detached	68%	39%	60%	50%	57%
Townhomes / Plexes	2%	20%	10%	10%	9%
Multi family (5+ units)	0%	29%	30%	24%	14%
Mfg. home / other	29%	11%	0%	16%	19%
<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>

Source: American Community Survey, 2011-2015; compiled by FCS GROUP.

## IV.B. HOUSING NEEDS SCENARIOS

As mentioned previously, Lane County and Florence have both shown measurable increases in population and households over the past few decades. The share of Lane County population that resides within Florence has increased from 2.25% in 2000 to 2.37% in 2016. **Hence, over the past 16 years, approximately 3.3% of the net change in Lane County population occurred within Florence.**

As indicated in **Exhibit IV.3**, according to the long-term (baseline) growth forecast provided by the Portland State University Population Research Center, population in Florence is expected to increase by 2,068 permanent residents over the next 20 years. This level of baseline population growth is expected to generate housing needs within the Florence UGB, as discussed below.

### Scenario A: Baseline Housing Forecast

The baseline housing forecast scenario takes into account trends in population and seasonal housing demand given recent housing capture rates for Florence. Scenario A assumes that Florence will continue to “capture” 3.8% of the County’s population growth by adding 2,068 residents over the next 20 years (equates to a 0.9% annual average growth rate for Florence UGB). The baseline scenario also assumes that ratio of people per household will continue its downward trend from 1.95 people per household in 2016 (est.) to 1.90 in 2036 (forecast), as “baby boomers” (residents born between 1946 - 1964) become empty nesters, retirees move into the area, and “millennials” (residents born between 1981 - 1997) delay starting families.

The resulting baseline housing forecast for Florence identifies the need for 1,218 net new dwellings for permanent residents over the next 20 years (**Exhibit IV.3**). If the City maintains the current level of seasonal housing (includes second homes and short term rentals) and vacant inventory at 18% of total inventory, there would be additional demand for approximately 263 housing units. The combination of housing for permanent residents and seasonal housing (includes second homes and short term rentals) is expected to require 1,481 dwellings over the next 20 years (**Exhibit IV.3**).

### Exhibit IV.3: Florence Housing Needs Forecast, Baseline Scenario A

	Estimate 2015	Forecast 2035	Proj. Change 20 Years	Proj. AGR
<b>Florence UGB Population</b>	<b>10,486</b>	<b>12,554</b>	<b>2,068</b>	<b>0.90%</b>
<b>Florence Housing Needs</b>				
Group Quarters Population	98	118	19	
Population in Households	10,388	12,436	2,049	
Avg. Household Size	1.95	1.90		
Resident Housing Units	5,327	6,546	<b>1,218</b>	1.04%
<b>Total Housing Units (baseline)</b>	<b>6,477</b>	<b>7,959</b>	<b>1,481</b>	<b>1.04%</b>
Seasonal & Vacant Housing Units	1,150	1,413	<b>263</b>	1.04%
percent of housing stock	18%	18%	18%	

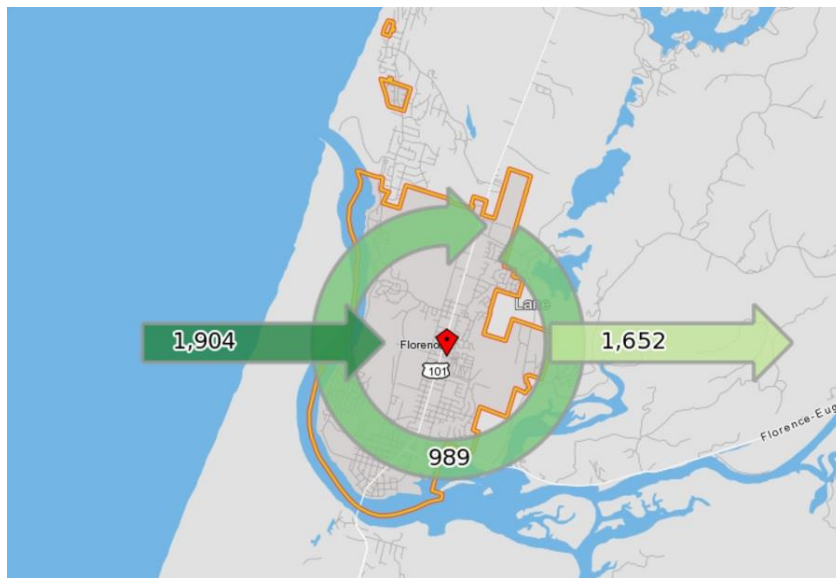
**Source:** Findings based on PSU Population Research Center data, Census data, and forecasts consistent with Florence UGB growth forecasts; FCS GROUP. AGR = annual average growth rate.



### Scenario B: Baseline + Workforce Housing Forecast

Scenario B is intended to remedy some of the current workforce housing imbalance while addressing the baseline demand included with Scenario A. During stakeholder interviews, the current lack of existing “affordable” workforce housing was identified as an important issue that likely accounts for high levels of in-commuting by Florence workers that travel long distances from their homes to their place of work. As indicated in the following map, shown as **Exhibit IV.4**, the local “covered workforce” includes approximately 1,904 people that work in Florence and in-commute from outside the City a distance of 25 miles or greater.

#### Exhibit IV.4 Florence Worker Commute Pattern, 2014



**Source:** U.S. Census, On-the-Map database; FCS GROUP.

If some new workforce housing is provided in Florence, it is assumed that approximately 25% of these long distance in-commuters would relocate to Florence in the short term (1-3 years). This level of “pent up” workforce housing demand would be over and above the baseline forecast. In Scenario B, the total housing need consists of the baseline demand (1,481 units) plus the added workforce housing demand 143 units and 40+/- beds for group quarters population, or 1,664 total dwelling units.

**Exhibit IV.5: Florence Housing Needs Forecast, Workforce Housing Scenario B**

<b>Florence Housing Needs Forecast: Workforce Housing Scenario</b>				
	<b>Estimate 2014</b>	<b>Estimate 2016</b>	<b>Forecast 2036</b>	<b>Proj. Change 2016-36</b>
Existing Workforce In-commuters	1,093	1,113		
Avg. Household Size	1.95	1.95		
Housing Unit Demand	561	571		
UGB Capture Rate Assumption			25%	
Existing Pent Up Workforce Housing Demand		----->	143	<b>143</b>
Baseline Scenario: Resident Units for Perm. Population				<b>1,218</b>
Baseline Scenario: Seasonal & Short-term Units		1,162	1,413	<b>263</b>
Group Quarters Housing				<b>40</b>
<b>Total Housing Units</b>	<b>6,477</b>	<b>1,162</b>		<b>1,664</b>
* Represents workforce in-commuters that currently travel over 25 miles to work in Florence.				
<b>Source:</b> U.S. Census, On The Map, 2014. FCS GROUP.				

## IV.C. RESIDENTIAL LAND NEEDS FORECAST

The next step in the housing needs analysis includes identification of the required housing unit types and requisite land needs. This is accomplished by applying the expected distribution of housing characteristics (shown in Exhibit IV.2) to each growth forecast discussed above; and including an average development density level for each dwelling unit type (based on permitting activity in the City over the past five years).

### Scenario A: Baseline Housing Forecast

In baseline forecast Scenario A, Florence should plan for 1,481 additional dwelling units over the next 20 years. Housing distribution would likely resemble current characteristics with the need for: 750 owner-occupied dwellings, 469 renter-occupied dwellings and 263 short-term rental units (and second homes), as shown in **Exhibit IV.6**. The expected housing mix under this scenario would consist of approximately: 858 single family detached homes, 122 manufactured housing units, 248 townhomes/duplexes, and 254 multifamily housing units.

The amount of required land area required to accommodate Scenario A housing need is approximately 217 acres. Much of the new single family detached and manufactured housing demand would require vacant land. Townhomes and multifamily developments could be accommodated through a mix of infill, redevelopment and vacant residential and mixed-use sites.

**Exhibit IV.6: Florence Baseline Housing Forecast Scenario A**

<b>Scenario A: Dwelling Unit Demand, Baseline Forecast</b>				<b>1,481</b>		
	<b>Owner-Occupied Dwelling Units</b>	<b>Renter-Occupied Dwelling Units</b>	<b>Second Homes &amp; Short Term Rentals</b>	<b>Net New Dwelling Units</b>	<b>Average Density (DU per Net Buildable Acre)</b>	<b>Potential Land Need (Net Buildable Acres)*</b>
<b>Housing Tenure Distribution:</b>	<b>750</b>	<b>469</b>	<b>263</b>	<b>1,481</b>	<b>6.8</b>	<b>217.0</b>
	<b>51%</b>	<b>32%</b>	<b>18%</b>	<b>100%</b>		
<b>Housing Unit/Type</b>						
Single Family Detached	562	164	132	858	6.0	164.4
Mfg. Housing (SFD)	75	47	0	122	9.0	15.6
Townhomes / Plexes (2-4 units)	75	94	79	248	12.0	23.7
Multifamily (5+ units)	37	164	53	254	22.0	13.3
<b>Total</b>	<b>750</b>	<b>469</b>	<b>263</b>	<b>1,481</b>	<b>6.8</b>	<b>217.0</b>

\* assumes 15% of land area added for public roads and infrastructure.

**Scenario B: Baseline + Workforce Housing Forecast**

Under housing forecast Scenario B, Florence should plan to add 1,664 dwelling units over the next 20 years. In comparison with Scenario A, the future housing mix would be more oriented towards long-term rental housing and a bit less towards short-term rentals. The total housing need is expected to consist of: 764 owner-occupied dwellings, 633 renter-occupied dwellings and 263 short-term rental units. The expected housing mix under this scenario would consist of: 858 single family detached homes, 145 manufactured housing units, 265 townhomes/duplexes, and 357 manufactured housing units and 40 special housing needs “beds.” The amount of required land area to accommodate this level of housing development is expected to be approximately 230.5 acres (Exhibit IV.7).

**Exhibit IV.7: Florence Housing Forecast Scenario B**

<b>Scenario B: Workforce Housing Policy Scenario</b>				<b>1,664</b>		
	<b>Owner-Occupied Dwelling Units</b>	<b>Renter-Occupied Dwelling Units</b>	<b>Second Homes &amp; Short Term Rentals</b>	<b>Net New Dwelling Units</b>	<b>Average Density (DU per Net Buildable Acre)</b>	<b>Potential Land Need (Net Buildable Acres)*</b>
<b>Housing Tenure Distribution:</b>	<b>768</b>	<b>633</b>	<b>263</b>	<b>1,664</b>	<b>7.2</b>	<b>230.5</b>
	<b>46%</b>	<b>38%</b>	<b>16%</b>	<b>100%</b>		
<b>Housing Unit</b>						
Single Family Detached	562	164	132	858	6.0	164.4
Mfg. Housing (SFD)	88	63	0	151	9.0	19.3
Townhomes / Plexes (2-4 units per structure)	80	110	79	270	12.0	25.8
Multifamily (5+ units per structure)	37	256	53	346	22.0	18.1
Special Needs Housing		40		40	16.0	2.9
<b>Total</b>	<b>768</b>	<b>633</b>	<b>263</b>	<b>1,664</b>	<b>7.2</b>	<b>230.5</b>

\* assumes 15% of land area added for public roads and infrastructure.

## IV.D. HOUSING ATTAINABILITY ISSUES

Current housing prices, as measured by average home sales prices and rent levels, have been increasing in recent years as the vacant inventory tightens. Local home prices are also driven up to some extent by an influx of buyers from outside the local market area.

To help gauge housing attainability in Florence, FCS GROUP examined current median family income (MFI) levels and U.S. Housing and Urban Development (HUD) guidelines. As indicated in **Exhibit IV.8**, the current (2017) median family income (MFI) for Florence is \$46,114. Using HUD guidelines for upper middle households earning 80% of the MFI, a 4-person family would be able to afford monthly rents at \$922 or lower and homes priced at less than \$197,000. These price levels should be considered “attainable” to households earning 80% of the local MFI.

### Exhibit IV.8: Florence and Lane County Housing Attainability Guidelines

Florence Median Family Income Level (2015)*		\$46,114
<b>Market Segment by Income Level</b>		
	<b>Lower-end</b>	<b>Upper-End</b>
High (120% or more of MFI)		120%
Upper Middle (80% to 120% of MFI)	80%	120%
Lower Middle (50% to 80% of MFI)	50%	80%
Low (30% to 50%)	30%	50%
Very Low (less than 30% of MFI)	30%	
<b>Qualifying Income Level</b>		
	<b>Lower-end</b>	<b>Upper-End</b>
High (120% or more of MFI)	\$55,337	or more
Upper Middle (80% to 120% of MFI)	\$36,891	\$55,337
Lower Middle (50% to 80% of MFI)	\$23,057	\$36,891
Low (30% to 50%)	\$13,834	\$23,057
Very Low (less than 30% of MFI)	\$13,834	or less
<b>Available Monthly Rent or Payment (@30% of income level)</b>		
	<b>Lower-end</b>	<b>Upper-End</b>
High (120% or more of MFI)	\$1,383	or more
Upper Middle (80% to 120% of MFI)	\$922	\$1,383
Lower Middle (50% to 80% of MFI)	\$576	\$922
Low (30% to 50%)	\$346	\$576
Very Low (less than 30% of MFI)	\$346	or less
<b>Approximate Attainable Home Price**</b>		
	<b>Lower-end</b>	<b>Upper-End</b>
High (120% or more of MFI)	\$296,000	or more
Upper Middle (80% to 120% of MFI)	\$197,000	\$296,000
Lower Middle (50% to 80% of MFI)	\$123,000	\$197,000
Low (30% to 50%)	\$74,000	\$123,000
Very Low (less than 30% of MFI)	\$74,000	or less

Notes:

\* based on American Community Survey data for City, 2011-15.

\*\* assumes 3% down payment on 30-year fixed mortgage at 4.0% interest.

Source: analysis by FCS Group using Housing and Urban Development guidelines, and US Census data.

FCS GROUP also reviewed recent home sales and asking prices of homes in Florence. Average annual homes sales by asking price are reported in **Exhibit IV.9**. The results indicate that there have been 35 sales per month over the last two calendar years. At the current pace of home sales, the existing inventory of 29 listings priced below \$199,000 will likely be depleted in a few months.

A tight housing supply in Florence is also evidenced by very low vacancy rates for apartments (under 5%), relatively high apartment rents, and long waiting lists, especially for apartments with two+ bedrooms. Rents for apartments typically start at \$900 per month for one bedrooms and exceed \$1,000 per month for two bedroom units. Interviews with local apartment property managers have indicated that well-appointed apartment developments experience a wait list of 6 months or longer.

**Exhibit IV.9: Florence Housing Inventory, Absorption and Attainability**

Sales Price Level	Recent Sales (past 2 years)	Avg. Sales Per Month (past 2 years)	Current Listings	Remaining Inventory (months)
Less than \$100,000	178	7.4	11	1.5
\$100,000 to \$149,999	130	5.4	13	2.4
\$150,000 to \$199,999	197	8.2	5	0.6
\$200,000 to \$249,999	167	7.0	15	2.2
\$250,000 to \$299,999	91	3.8	12	3.2
\$300,000 to \$349,999	40	1.7	15	9.0
\$350,000 to \$399,999	22	0.9	5	5.5
\$400,000 to \$499,999	17	0.7	5	7.1
\$500,000 or more	9	0.4	12	32.0
Total	851	35	93	

**Source:** Zillow.com; analysis by FCS 9/13/17.

## IV.E. FINANCIAL FEASIBILITY ANALYSIS

As part of this HNA update, FCS GROUP evaluated the feasibility of developing various types of housing given market rates and construction costs. The results depicted in **Appendix F**, indicate that most development types are feasible at land values under \$8.60 per SF of land area for single family, \$10 per SF for townhomes if they are “shovel ready” sites and developed privately.

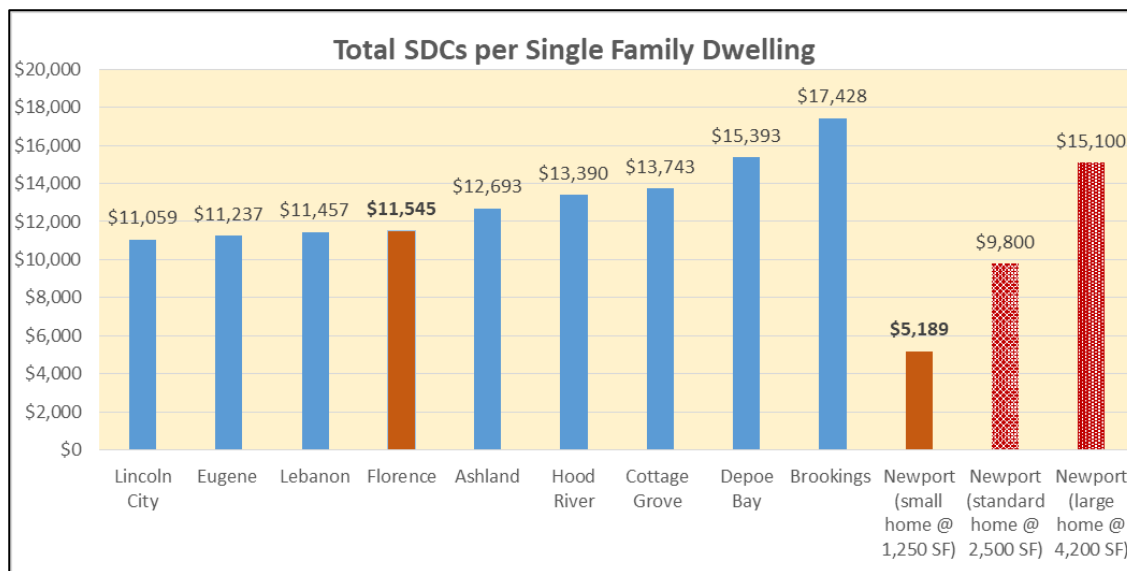
Currently, apartment and mixed-use developments are not considered to be financially feasible in Florence unless they are developed by a non-profit developer or unless there is some level of public funding or assistance is made available. Please refer to **Appendix F** for a list of public policies used by cities across the U.S. to encourage development of apartments and affordable housing.

In coastal and rural communities located outside major metropolitan areas, the cost of new construction (building soft costs and hard costs) is usually higher than in urban locations. While land costs may be lower and building material costs are slightly higher, labor costs may run 7% to 15% higher. Higher labor costs may be attributed to longer travel times, greater mobilization costs and

higher transportation costs. In some instances, developers in rural areas may also be required to provide temporary housing assistance for their workers.

The cost of development permitting is a “soft cost” that also ranges measurably by location, and impacts a project’s feasibility. The cost of impact fees (System Development Charges or SDCs in Oregon) typically vary from 2% to 10% of a project’s development costs (excluding land). Current SDCs in Florence for a single family home are \$11,545, which is considered to be about average for small cities in Oregon (see **Exhibit IV.10**).

**Exhibit IV.10: Florence Housing Inventory, Absorption and Attainability**



Florence may consider varying SDCs by home size, as a way to lower the cost of delivering more affordable housing. Newport recently changed their SDC methodology from a single fee per single family home (similar to Florence’s current SDC method) to a variable SDC that takes into account home size. SDCs in Newport have been reduced by about \$5,800 per dwelling unit for smaller homes and by about \$1,100 for standard size homes. For affordable apartment dwellings, SDCs in Newport may be eliminated and a local construction excise tax (CET) has been adopted to effectively reduce the cost of delivering apartment units by \$5,300 per apartment unit.

#### IV.F. SPECIAL NEEDS HOUSING

Housing options for special needs, including homeless individuals, families and youth experiencing homelessness can be provided by nonprofit agencies, government entities, and faith-based organizations. Homeless service centers, such as Siuslaw Outreach Services, currently provide 10-year round beds (Hope House DV Shelter) and 9 seasonal beds for the local population in Florence. In keeping with the population growth forecast described in this section, it is recommended that Florence adopt a policy target of accommodating an additional 20-30 year-round beds and 10-20 seasonal beds for special needs population over the next 20 years. This level of “group quarters”

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housing is over and above the housing need described above and should be accommodated by the City, preferably in locations within 1,500 feet of available transit service.

This effort will likely require the City to work with various non-profits, County and State government entities and faith-based organizations to identify appropriate sites/locations for various forms of housing, such as:

- Emergency Shelters
- Transitional Micro-Housing
- Permanent Housing
- Community Service Centers for Youth and Singles

Please contact the Human Services Division for Lane County for additional information and volunteer opportunities at <https://www.lanecounty.org>.

## Section V. BUILDABLE LAND INVENTORY

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In accordance with OAR 660-024 and OAR 660-038, the existing supply of buildable land within Florence city limits and urban growth boundary (UGB) was inventoried and evaluated. Using the buildable land inventory (BLI) methodology consistent with OAR 660024 and OAR 660-038, the Florence HNA and EOA includes a recent buildable land inventory completed by the consultant team using Geographic Information Systems (GIS) data that is consistent with the City of Florence and Lane County's vacant land assumption.

### V.A. METHODOLOGY

Florence's BLI is comprised of existing vacant and partially vacant (sub-dividable) tax lots as well as City-owned land that might be available for future development.

All tax lots within the Florence UGB have been classified into the following categories:

- **Unbuildable** – Land considered unbuildable per Lane County's GIS parcel database. Plus land that is either constrained by: (1) more than 90%, is deemed unbuildable by existing use (right of way, common land for home owner association, etc.); or (2) zoning disallows for future development (e.g., Parks, Open Space, Marine Water, Title 10 Wetlands, Agricultural Conservation, and Timber Conservation zones).
- **Public** – Lands in public or semi-public ownership. Public lands where identified by Lane County's parcel GIS "exempt" description. There are two subcategories:
  - **Public** – Land in public ownership that is considered unavailable for future development such as land owned by the City, State, Tribes, etc.
  - **Semi-Public available** – Land identified as in non-profit ownership, such as churches, Veterans, etc.
- **Vacant** – tax lots that are considered vacant per Lane County's 2017 GIS database.
- **Partially Vacant** – Tax lots that contain enough land to be subdivided without need of rezoning. There are four sub categories:
  - **Partially Vacant Residential** – Residential tax lots that have at least one-half acre of buildable land. For already developed tax lots, this amount was determined by subtracting one-quarter acre was subtracted from the buildable land to account for the existing dwelling. An aerial photography scan deemed existing multi-family parcels to be not well suited for subdividing and therefore not designated as partially vacant.
  - **Partially Vacant Employment** – Parcels with commercial or industrial zoning that have at least two acres of buildable/unconstrained land. Aerial photography helped in determining the amount of buildable land.
  - **Partial Vacant Public** – Parcels owned by public hand that have at least two acres of buildable/unconstrained land. Aerial photography helped in determining the amount of buildable land.



- **Partial Vacant Semi-Public** – Other parcels classified by the Lane County GIS database as “exempt” and owned by the public with at least two acres of buildable/unconstrained land. Aerial photography helped in determining the amount of buildable land.
- **Developed** – Tax lots in private ownership that are occupied by an existing building and cannot be subdivided under current zoning or redeveloped.
- **Redevelopable** – Developed tax lots with an improvement value that is lower than the land value with at least 10,000 square feet of unconstrained land.

Using Oregon’s BLI analysis guidelines, all significant environmental constraints are deducted from gross vacant land area to estimate buildable land area. These constraints include: open water (such as the Siuslaw River), wetlands, riparian buffers, floodways, slopes of more than 25 percent, as well as the 100-year floodplain.

It should be noted that there is some level of existing development along the Siuslaw River, and much of this area lies within the 100-year floodplain. Construction can occur within floodplains, and this analysis assumes that 50% of the floodplains are included in the BLI. If parcels within the floodplain have additional constraints (such as slopes, wetlands, etc.) it is assumed that that parcel is fully constrained and not counted as part of the BLI.

All GIS data used in this BLI analysis were provided by the City of Florence staff using Lane County GIS data, except for the steep slopes. Steep slopes were derived from 10-meter USGS Digital Elevation Model (DEMs). Light Detection and Ranging (LIDAR) data were also provided by the City but was found to have too much detail for a UGB-wide parcel-level analysis.

## V.B. OVERALL CITY LAND INVENTORY FINDINGS

Key findings from the BLI for the City of Florence municipal boundary are summarized in **Exhibit V.1** and detailed in **Appendix G**. Key findings include:

- The City of Florence has 21 “base zones” and 14 “mixed use zones” within its current local development ordinance.
- There are an estimated 1,733.4 acres within the existing City municipal boundary spread out among 5,844 tax lots (parcels).
- Approx. 43% of the land area (748.8 ac.) within the City is already “developed” and 16% (273.8 acres) is considered to be unbuildable due to constraints.
- Vacant buildable land area consists of 472 acres, including: 370 acres of private land, 88 acres of public land and 14 acres of land owned by semi-public/non-profit owners.
- Part-Vacant (sub-dividable) buildable land area includes 26 parcels with 88 acres, including: 14.5 acres of private land, 54 acres of public land and 20 acres of land owned by semi-public/non-profit owners.
- Redevelopment opportunities were identified for 222 parcels comprising a total of 150 acres of land area.

General land use categories have been assigned to each detailed zone classification (using assumptions shown in **Appendix I** to arrive at an overall estimate of existing buildable land within the City of Florence.

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A distribution of the existing BLI by parcel size provided in **Appendix G** along with maps illustrating buildable vacant land and potential redevelopment areas.

#### Exhibit V.1: City of Florence Land Inventory

BLI Category	Acres	Dist.
<b>Total</b>	<b>1,733.4</b>	<b>100%</b>
Developed	748.8	43%
Constrained/Unbuildable	273.8	16%
Buildable Vacant Lands:		
Vacant, Private	370.2	21%
Vacant, Public	101.8	6%
Part Vacant, Private	14.5	1%
Part Vacant, Public	74.0	4%
Redevelopable*	150.3	9%

Source: GIS analysis by Fregonese Associates; analysis by FCS GROUP.

\* Tax lots with land value greater than improvement value.

## V.C. ADDITIONAL UGB LAND INVENTORY

In addition to land within the City of Florence, there is vacant and redevelopable land outside the city but inside the current Urban Growth Boundary (UGB). The resulting findings are summarized in **Exhibit V.2**.

There are approximately 849.4 acres outside the City but inside the current UGB. After subtracting “developed” lands (236 acres) and “constrained” lands (125.5 acres), the remaining “vacant and buildable” land area consists of an estimated 487.9 acres.

#### Exhibit V.2: Florence UGB Outside City Land Inventory

BLI Category	Acres	Dist.
<b>Total</b>	<b>849.4</b>	<b>100%</b>
Developed	236.0	28%
Constrained/Unbuildable	125.5	15%
Buildable Vacant Lands:		
Vacant, Private	261.0	31%
Vacant, Public	14.0	2%
Part Vacant, Private	135.5	16%
Part Vacant, Public	0.0	0%
Redevelopable*	77.4	9%

Source: GIS analysis by Fregonese Associates; analysis by FCS GROUP.

\* Tax lots with land value greater than improvement value.

In discussions with City of Florence, planning and public works staff, it is assumed that all of the land identified within the City and UGB can be served by adequate public facilities (roads, sewer, water, etc.) within 1-3 years. Please refer to **Appendix H** for additional detail regarding land outside the city but inside the UGB.

# Section VI. RECONCILIATION OF LAND NEEDS

## VI.A. EMPLOYMENT LAND NEEDS

In accordance with OAR 660-009-0025, an analysis of 20-year land needs for employment growth in the Florence UGB is required along with attention to unique site needs based on the identified employment types.

After accounting for the level of expected growth and redevelopment activity, the amount of vacant land demand in the Florence UGB for employment uses over the next 20-years is expected to range from 39.3 acres (Scenario A) to 54.9 acres (Scenario B). The analysis provided below generally indicates that all of the job growth and employment land need projected over the next 20 years can occur within the existing Florence City limits.

**The overall employment land need forecast for Florence assumes a high level of redevelopment activity for strategic locations within the City, including downtown, and the US 101 Corridor.** Much of the redevelopment is expected to occur on smaller lots with a mix of commercial retail, office and upper level residential uses (particularly in mixed use zones in Old Town. Overall redevelopment activity within the Florence UGB is expected to range from 46,000 to 53,000 square feet of infill/redevelopment (building floor area), which is over and above the vacant land needs shown in **Exhibit VI.1.**

### Exhibit VI.1

#### Florence UGB Vacant Land Needs for Employment 20-year Forecast (buildable acres)

General Development Type	Scenario A (Base Case)	Scenario B (Strategic Growth)	Recommended Site Requirements for Scenario B	Most Applicable Zones*
Industrial	8.4	19.3	Mix of small, medium and large sites; full infrastructure services.	CITY (C, HD, MSA, MSB, NCD, OTB, OTC, OTDA)
Retail/Food/Lodging	12.8	17.4	Good visibility, infill sites, plus 1 neighborhood center with medium size grocery store, plus at least 2 hotel sites	CITY (C, H, MSA, MSB, NCD, OTB, OTC, OTDA, POI)
Office/Education/Other Government	18.1	18.1	Infill sites plus incubator facility (1 acres sites)	CITY (AD, I, IP, LI, SID, M, WF/M)
<b>Total Acres</b>	<b>39.3</b>	<b>54.9</b>		

Source: derived from Exhibit V.6 & V.7. \* Refer to land use code definitions provided in Appendix I.

The actual amount and timing of new development will vary from year to year. The range in development forecasts reflects several issues:

- Uncertainty regarding the ability to attract major industrial employers.
- The City's potential to stimulate redevelopment at targeted locations.

### Industrial Land Requirements

As indicated in **Exhibit VI.2**, Scenario B would require approximately 19.3 buildable acres of vacant land for industrial uses over the next 20 years. This amount of demand should be "easily" accommodated within the current vacant buildable industrial land supply (162.9 acres) inside the Florence city limits.

A preliminary expected forecast of demand by parcel size is also provided below. The findings indicate that the industrial land will primarily consist of small businesses requiring less than 5 acres, which can be accommodated by the existing land supply. The city should also plan on demand for 2 medium size businesses requiring about 5 acres each and 1 large business requiring 10+ acres. Hence, the City should support subdivision of larger sites into 5 to 10 acre parcels. It should also be noted that in addition to this level of land absorption, it is expected that Florence should also plan for at least 14,000 SF of redevelopment to accommodate industrial job growth.

### Exhibit VI.2 Florence 20-Year Industrial Land Requirements

Industrial Vacant Land Demand and Supply					
Overall Land Demand/Supply	Scenario A	Scenario B	Notes		
Land Demand (acres)	8.4	19.3	Land Supply is sufficient to accommodate Scenario B.		
Land Supply (acres)*	162.9	162.9			
Private acres	33.4	33.4			
Public acres	128.6	128.6			
Semi-Public acres	0.9	0.9			
<b>Net UGB Land Surplus or (Deficit)</b>	<b>154.5</b>	<b>143.6</b>			
Vacant Tax Lot Inventory by ownership*	1 acre or less	1 to 5 ac.	5 to 10 ac.	10+ acres	Total Tax Lots
Private	93	7	0	0	100
Public	22	18	0	3	43
Semi-Public	3	0	0	0	3
<b>Total</b>	<b>118</b>	<b>25</b>	<b>0</b>	<b>3</b>	<b>146</b>
Scenario B: Parcel Demand Forecast	Existing Supply (tax lots)*	Forecast of Expected Parcel Demand	Parcel Surplus or (Deficit)	Notes**	
Development Site/Parcel Size					
Less Than 1 acre	118	12	106	surplus supply	
1 to 5 acres	25	4	21	surplus supply	
5 to 10 acres	0	2	(2)	UGB need for 5 acre site(s)	
10+ acres	3	1	2	Supports subdivision of 10+ ac. sites	
<b>Total Parcels or Tax Lots</b>	<b>146</b>	<b>19</b>	<b>127</b>		

Source: \* supply reflects unconstrained vacant and part-vacant BLI findings included in Appendix G.

Industrial supply reflects zone classification assumptions shown in Appendix I.

\*\* City may consider allowing certain commercial activities on industrial lands.

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### Office Land Requirements

As indicated in **Exhibit VI.3**, Scenario B would require approximately 18.1 buildable acres of vacant land for office/service uses over the next 20 years. This amount of demand should be accommodated within the current vacant buildable office land supply (36.6 acres) inside the Florence city limits.

A preliminary expected forecast of demand by parcel size is also provided below. The findings indicate that most office land will primarily consist of small businesses requiring less than 1 acres in small commercial buildings. **The city should also plan on demand for at least one new business center requiring 5+ acres. This business center could include a mix of office, health service, education and workforce housing. In addition to this level of land absorption, it is expected that Florence should also plan for infill and redevelopment as well creation of a business incubator facility to accommodate job growth.**

#### Exhibit VI.3 Florence 20-Year Office/Service Land Requirements

Office/Service Land Demand and Supply					
Overall Land Demand/Supply	Scenario A	Scenario B	Notes		
Land Demand (acres)	18.1	18.1	Land Supply is sufficient to accommodate Scenario B.		
Land Supply (acres)*	36.6	36.6			
Private acres	24.8	24.8			
Public acres	3.9	3.9			
Semi-Public acres	7.9	7.9			
<b>Net UGB Land Surplus or (Deficit)</b>	<b>18.4</b>	<b>18.4</b>			
Vacant Tax Lot Inventory by ownership*	1 acre or less	1 to 5 ac.	5 to 10 ac.	10+ acres	Total Tax Lots
Private	74	5	1	0	80
Public	4	2	0	0	6
Semi-Public	22	2	0	0	24
<b>Total</b>	<b>100</b>	<b>9</b>	<b>1</b>	<b>0</b>	<b>110</b>
Scenario B: Parcel Demand Forecast	Existing Supply (tax lots)*	Expected Parcel Demand	Parcel Surplus or (Deficit)	Notes**	
Development Site/Parcel Size					
Less Than 1 acre	100	10	90	surplus supply	
1 to 5 acres	9	6	3	surplus supply	
5 to 10 acres	1	1	0	balanced supply	
10+ acres	0	0	0	balanced supply	
<b>Total Parcels or Tax Lots</b>	<b>110</b>	<b>17</b>	<b>93</b>		

Source: \* supply reflects vacant and part-vacant BLI findings included in Appendix G.

Office supply reflects zone classification assumptions shown in Appendix I.

\*\* City may consider allowing certain commercial activities on industrial lands.

### Retail/Commercial Land Requirements

As indicated in **Exhibit VI.4**, Scenario B would require approximately 17.4 buildable acres of vacant land for retail, food service and lodging uses over the next 20 years. This amount of demand should

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be accommodated within the current vacant buildable office land supply (58.3 acres) inside the Florence city limits.

A preliminary expected forecast of demand by parcel size is also provided below. The findings indicate that the most retail/commercial land will primarily consist of small businesses requiring less than 1 acre or as tenants in commercial shopping buildings. **At least 2-3 hotel sites will also be needed requiring 1-2 acre sites. The city should also plan on demand for at least one new neighborhood commercial center (with grocery store anchor) requiring 5+ acre sites.** In addition to this level of land absorption, it is expected that Florence should also plan for measurable amounts of infill and redevelopment to accommodate job growth.

#### Exhibit VI.4 Florence 20-Year Retail/Commercial Land Requirements

##### Retail/Commercial Vacant Land Demand and Supply

Overall Land Demand/Supply	Scenario A	Scenario B	Notes		
Land Demand (acres)	12.8	17.4	Land Supply is sufficient to accommodate Scenario B.		
Land Supply (acres)*	58.3	58.3			
Private acres	53.5	53.5			
Public acres	4.0	4.0			
Semi-Public acres	0.8	0.8			
<b>Net UGB Land Surplus or (Deficit)</b>	<b>45.5</b>	<b>40.9</b>			
Vacant Tax Lot Inventory by ownership*	1 acre or less	1 to 5 ac.	5 to 10 ac.	10+ acres	Total Tax Lots
Private	76	7	1	1	85
Public	18	0	0	0	18
Semi-Public	6	0	0	0	6
<b>Total</b>	<b>100</b>	<b>7</b>	<b>1</b>	<b>1</b>	<b>109</b>
Scenario B: Parcel Demand Forecast	Existing Supply (tax lots)*	Expected Parcel Demand	Parcel Surplus or (Deficit)	Notes	
Development Site/Parcel Size					
Less Than 1 acre	100	14	86	surplus supply	
1 to 5 acres	7	2	5	surplus supply	
5 to 10 acres	1	1	0	balanced supply	
10+ acres	1	1	0	balanced supply	
<b>Total Parcels or Tax Lots</b>	<b>109</b>	<b>18</b>	<b>91</b>		

Source: \* supply reflects vacant and part-vacant BLI findings included in Appendix G.

Commercial supply reflects zone classification assumptions shown in Appendix I.

\*\* City may consider allowing certain commercial activities on industrial lands.

## VI.B. HOUSING LAND NEEDS

The approach used to determine Florence UGB land needs is consistent with the DLCDC Goal 10 administrative rule, the supporting statutes (including ORS 197.296), as well as guidance provided per the DLCDC guidebook titled: *Planning for Residential Growth (1997)*. While ORS 197.296 specifically applies to cities with 25,000 or more population, this statute is generally followed to determine housing needs for Florence (2016 pop. 8,680). This analysis also incorporates forecasts of

future population growth in Florence based on data from Portland State University’s Population Research Center, and the resulting housing demand findings as summarized in Section V.

As indicated in **Exhibit VI.5**, the amount of vacant land required for housing is projected to range from 217 acres (Scenario A) to 230.5 acres (Scenario B).

**This analysis indicates that virtually all of the growth in low density housing (single family detached, townhomes, duplexes, manufactured housing) can be accommodated within the existing City limits**, and there is potential demand for subdivision activity in adjacent lands within the UGB but outside the current City limits. The projected housing demand and land needs for apartments and other medium-density workforce housing and condominium developments can be accommodated within the existing City limits.

**Exhibit VI.5: Florence UGB Vacant Land Needs for Housing**

**20-year Forecast (buildable acres)**

General Development Type	Scenario A (Base Case)	Scenario B (Strategic Growth)	Recommended Site Requirements for Scenario B	Most Applicable Zones*
Single Family Detached	164.4	164.4	ADU sites; plus subdivisions on 5+ acre parcels	CITY (CV, RR, RS) COUNTY (RA, RR, RR1, RR5)
Mfg. Housing (SFD)	15.6	19.3	Subdivisions on 5-10+ acre sites	CITY (MH) COUNTY (RA.MH)
Townhomes / Plexes (2-4 units per structure)	23.7	25.8	Small sites less than 1 acre, and workforce housing as part of PUD subdivisions	CITY (CV, RR, RS) COUNTY (RA, RR, RR1, RR5)
Multifamily and Special Needs (5+ units per structure)	13.3	20.9	Mostly 1 to 5 acre sites, assisted living facilities, and mixed use (e.g., housing w/commercial), plus housing for special needs	CITY (RM, OTB, OTC, OTDA)
<b>Total Acres</b>	<b>217.0</b>	<b>230.5</b>		

Source: derived from Exhibit IV.2. \* Refer to land use code definitions provided in Appendix I.

**VI.B.1.a Single Family Detached and Attached Housing**

Low-density housing would primarily consist of single family detached and attached (townhome) units and duplexes. While manufactured housing and mobile homes could also be included in this category they are analyzed separately below.

As indicated in **Exhibit VI.6**, Scenario B would require approximately 164.4 buildable acres for single family detached housing and 19.3 acres for manufactured housing over the next 20 years. This amount of demand should be accommodated within the current vacant low-density residential land supply, which includes 222 acres inside the City limits and an additional 227 acres outside the City but inside the Florence UGB.

A preliminary forecast of demand by parcel size is also provided below. The findings indicate that most low-density housing needs can be accommodated through small less than 1-acre infill sites. **It is anticipated that there will be several medium size subdivisions (1 to 10 acres each) and up to 5 major subdivisions (PUDs) with over 10 acres each. The larger PUDs may also include a mix**

of detached units, townhomes and duplex unit along with supporting commercial retail/services.

### Exhibit VI.6 Florence UGB 20-Year Housing Land Requirements

#### Residential: Low Density Land Demand and Supply

Overall Land Demand/Supply	Scenario A	Scenario B	Notes		
Land Demand (acres)	188.2	205.3	Land Supply is sufficient to accommodate Scenario B.		
Land Supply (acres)*	449.8	449.8			
<i>Inside City Limits</i>	222.4	222.4			
<i>In UGB Outside City</i>	227.3	227.3			
<b>Net UGB Land Surplus or (Deficit)</b>	<b>261.6</b>	<b>244.5</b>			
Vacant Tax Lot Inventory by ownership*	1 acre or less	1 to 5 ac.	5 to 10 ac.	10+ acres	Total Tax Lots
<i>Private</i>	449	42	9	12	512
<i>Public</i>	276	13	3	8	300
<i>Semi-Public</i>	5	0	1	0	6
<b>Total</b>	<b>730</b>	<b>55</b>	<b>13</b>	<b>20</b>	<b>818</b>
Scenario B: Parcel Demand Forecast	Existing Supply (tax lots)*	Expected Parcel Demand	Parcel Surplus or (Deficit)	Notes**	
Development Site/Parcel Size					
Less Than 1 acre	730	80	650	suplus supply	
1 to 5 acres	55	18	37	suplus supply	
5 to 10 acres	13	7	6	suplus supply	
10+ acres	20	5	15	suplus supply	
<b>Total Parcels or Tax Lots</b>	<b>818</b>	<b>110</b>	<b>708</b>		

Source: \* reflects vacant and part-vacant BLI findings included in UGB (Appendix G & H).

Residential supply reflects zone classification assumptions shown in Appendix I.

#### VI.B.1.b Manufactured Housing and Tiny Home Communities

Low-density housing would also include manufactured housing developments. While a certain portion of this demand could occur within the single family detached land demand mentioned above, it is expected that there will be additional demand beyond that level for approximately 16 to 17 acres of planned manufactured housing developments.

As indicated in **Exhibit VI.8**, Scenario B would require approximately 17.4 buildable acres over the next 20 years. This amount of demand would be in addition to any units included as part of the single family development demand mentioned previously, and should be accommodated within the vacant land zoned for this type of use, which includes 46 acres inside the City limits and an additional 175 acres of buildable land outside the City but inside the Florence UGB.

A preliminary forecast of demand by parcel size is also provided below. The findings indicate that most manufactured housing demand can be accommodated through medium to large sites (5 to 10+ acres). It is anticipated that there will be several minor partitions (less than 1 acre each) to make way



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for tiny homes or other pre-fabricated housing types. **Medium size PUDs (3 to 5 acres) could include multiple pre-fabricated cottages or tiny homes clustered around a common shared open space.**

### Exhibit VI.7 Florence UGB 20-Year Housing Land Requirements

Residential: Manufactured Housing Land Demand and Supply					
Overall Land Demand/Supply	Scenario A	Scenario B	Notes		
Land Demand (acres)	15.6	17.4	Land Supply is sufficient to accommodate Scenario B.		
Land Supply (acres)*	220.9	220.9			
<i>Inside City Limits</i>	46.0	46.0			
<i>In UGB Outside City</i>	174.9	174.9			
<b>Net UGB Land Surplus or (Deficit)</b>	<b>205.3</b>	<b>203.5</b>			
Vacant Tax Lot Inventory by ownership*	1 acre or less	1 to 5 ac.	5 to 10 ac.	10+ acres	Total Tax Lots
<i>Private</i>	270	60	7	3	340
<i>Public</i>	0	0	0	0	0
<i>Semi-Public</i>	0	0	0	0	0
<b>Total</b>	<b>270</b>	<b>60</b>	<b>7</b>	<b>3</b>	<b>340</b>
Scenario B: Parcel Demand Forecast	Existing Supply (tax lots)*	Expected Parcel Demand	Parcel Surplus or (Deficit)	Notes**	
Less Than 1 acre	270	10	260	suplus supply	
1 to 5 acres	60	4	56	suplus supply	
5 to 10 acres	7	2	5	suplus supply	
10+ acres	3	2	1	balanced supply	
<b>Total Parcels or Tax Lots</b>	<b>340</b>	<b>18</b>	<b>322</b>		

Source: \* supply reflects vacant and part-vacant BLI findings included in Appendix G & H.

Residential supply reflects zone classification assumptions shown in Appendix I.

#### VI.B.1.c Medium Density Housing

Medium-density housing includes apartments, assisted living, workforce housing and special needs housing. As indicated in **Exhibit VI.9**, Scenario B would require approximately 14.8 buildable acres to accommodate approximately 300 units over the next 20 years. This amount of demand would can be accommodated within the vacant land zoned for this type of use, which includes nearly 34 acres inside the City limits.

A preliminary forecast of demand by parcel size is also provided below. The findings indicate that there are only 3 existing vacant buildable parcels inside the City zoned for medium-density housing. Hence, **the City should encourage future PUDs (in low-density locations) and mixed-use developments to include workforce housing elements. The City should also support future annexations that include workforce housing development.**

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**Exhibit VI.8 Florence UGB 20-Year Land Requirements****Residential: Medium Density/Workforce Housing Land Demand and Supply**

Overall Land Demand/Supply	Scenario A	Scenario B	Notes		
Land Demand (acres)	13.3	14.8	Land Supply is sufficient to accommodate Scenario B.		
Land Supply (acres)*	33.9	33.9			
Private acres	14.5	14.5			
Public acres	2.0	2.0			
Semi-Public acres	17.3	17.3			
Net UGB Land Surplus or (Deficit)	20.6	19.1			
Vacant Tax Lot Inventory by ownership*	1 acre or less	1 to 5 ac.	5 to 10 ac.	10+ acres	Total Tax Lots
Private	135	0	0	0	135
Public	7	1	0	0	8
Semi-Public	9	1	0	1	11
<b>Total</b>	<b>151</b>	<b>2</b>	<b>0</b>	<b>1</b>	<b>154</b>
Scenario B: Parcel Demand Forecast	Existing Supply (tax lots)*	Expected Parcel Demand	Parcel Surplus or (Deficit)	Notes**	
Development Site/Parcel Size					
Less Than 1 acre	151	10	141	suplus supply	
1 to 5 acres	2	4	(2)	demand in Mixed Use zones likely	
5 to 10 acres	0	1	(1)	demand in PUDs likely	
10+ acres	1	1	0	balanced supply	
<b>Total Parcels or Tax Lots</b>	<b>154</b>	<b>16</b>	<b>138</b>		

Source: \* supply reflects vacant and part-vacant BLI findings included in Appendix G.

Residential supply reflects zone classification assumptions shown in Appendix I.

## Section VII. COMMUNITY PREFERENCES

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As part of the BLI, HNA and EOA update, the City of Florence conducted significant community and business outreach in 2017. To learn more about community ideas for housing and economic development, the City administered a questionnaire. The questionnaire was available online and in hard copy from August 7 to September 15, 2017. 661 people completed the questionnaire, including nearly 40 surveys that were completed in Spanish. The following summary of the survey results will be utilized by the study committee to ascertain City policies for shaping future housing and economic development opportunities. Please refer to **Appendix F** for a detailed summary of survey input.

### VII.A. HOUSING PREFERENCES

The following narrative describes top preferences listed by survey respondents for each survey question.

#### Q1. How should the City prioritize housing-related funding?

- #1: Ensure affordable and sufficient housing options in the future
- #2: Preserve and rehabilitate the existing housing stock
- #3: Other ideas, such as providing more affordable housing and addressing homeless needs
- #4: Enhancing the character of existing neighborhoods
- #5: Updating regulations that govern neighborhood design and development

#### Q2. On what types of housing opportunities should the City focus its resources?

- #1: Long-term rentals (monthly/annual rental units)
- #2: Affordable workforce housing (e.g., accessory dwelling units)
- #3: Subsidized housing

#### Q3. What housing types does Florence need most?

- #1: Single family detached
- #2: Cottage housing (small units clustered around a common green)
- #3: Apartments and Condominiums (in buildings with 3 or more floors)
- #4: Attached single family (townhomes)
- #5: Duplex and triplex units

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#### Q4. Should residential neighborhoods include opportunities for short-term (less than 30 days) rentals?

- NO: 70% of respondents
- YES: 30% of respondents

#### Q5. Florence needs units with how many bedrooms?

- 3 bedrooms: 76% of respondents
- 2 bedrooms: 72% of respondents
- 1 bedroom: 44% of respondents

#### Q6. What do you consider to be an affordable purchase price for a home?

- 5 bedrooms: \$250,000 to \$300,000 received most votes
- 4 bedrooms: \$200,000 to \$250,000 received most votes
- 3 bedrooms: \$150,000 to \$200,000 received most votes
- 2 bedrooms: \$100,000 to \$150,000 received most votes
- 1 bedroom: less than \$100,000 received most votes

#### Q7. What do you consider to be an affordable monthly rent for a home?

- 3 bedrooms: \$900 to \$1,100 received most votes
- 2 bedrooms: \$700 to \$900 received most votes
- 1 bedroom: \$500 to \$700 received most votes
- Studios: less than \$500 received most votes

## VII.B. ECONOMIC DEVELOPMENT PREFERENCES

The following narrative describes top preferences listed by survey respondents for each survey question.

#### Q8. How should the City prioritize economic development-related funding?

- #1: Work with local and regional partners to promote and grow local business
- #2: Revitalize and redevelop existing commercial and industrial districts
- #3: Expand other industry clusters in software/IT, forest products, craft food/beverages, outdoor gear, seafood products, etc.

#### Q9. Identify Florence's strengths and weaknesses as a place to do business

##### Top Strengths

#1: Location on Oregon Coast

#2: Quality of Life

#3: Local markets and volume of customers

### Top Weaknesses

#1: Available skilled workforce

#2: Proximity to major transportation corridors

#3: Public infrastructure (transportation, utilities, high speed internet, etc.)

## VII.C. DEVELOPMENT AND POLICY CONCEPTS

In addition to the information gleaned from the community survey, the City and consultant team conducted a series of small group meetings, HEOP committee meetings and an open public meeting to formulate and discuss policy and development concepts to help shape future Community goals and objectives. The following narrative describes key policy and development concepts that are generally supported by the community.

### Housing

- Incentivize land lords to keep long-term housing stable: lower taxes and utility bills.
- Relax ADU regulations. Increase residential density by encouraging ADUs.
- Allow for coastal villages model. Examine practices from other cities to lower costs.
- Build tiny houses here and train locals to do so. Engage retirees to assist.
- Small/tiny home communities; cottages with central garden.
- There is support for the city taking a more proactive role in public private development projects that address workforce housing needs.

### Economic and Workforce Development

- Examine ways to improve commercial space; with lower rents for startups.
- Open a brew pub.
- Enhance creative/arts spaces.
- Explore workforce development at LCC Florence campus. Work with Lane Community College to offer trades education.
- Promote ATV development and testing.
- Develop fiber optic network.
- Recruit businesses. Florence offers a great location.
- Promote start-ups. Support programs that help local businesses expand, such as the RAIN initiative.
- Support redevelopment concept plans generated for a former restaurant site as an artist community and artist retreat location
- There is broad support for enhanced high school and community college training in the construction trades. The hope is that younger workers will be retained or attracted to Florence, constructing “tiny

homes” for local developments. Such housing could also be “exported” to areas along the west coast.

- Better usage of the airport with focus on avionics and emergency preparedness training (e.g., in the event of a Tsunami).

### General Concepts

- Streamlining regulations and the permit approval process.
- Consider a revised SDC program that would lower SDCs for smaller homes relative to larger homes.
- Support a policy which would incentivize mixed use development since it would decrease transportation costs for residents as well as make the city more walkable.

# Section VIII. ECONOMIC DEVELOPMENT

## GOALS, OBJECTIVES AND POLICY

### RECOMMENDATIONS

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For a comprehensive list of Economic Development and Housing Goals, Objectives, Policies and Recommendations please refer to Volume 1: Summary document.

# APPENDIX

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Appendix A Employment Trends

**Lane County Employment Trends by Sector, 2006-2016 (covered workers)**

	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2006-2016	
												Annual Growth Rate	
												Jobs	%
<b>Total nonfarm employment</b>	<b>154,400</b>	<b>157,200</b>	<b>155,000</b>	<b>142,600</b>	<b>141,400</b>	<b>141,700</b>	<b>142,400</b>	<b>144,400</b>	<b>148,000</b>	<b>152,200</b>	<b>156,700</b>	<b>2,300</b>	<b>0.15%</b>
<b>Total private</b>	<b>125,700</b>	<b>127,700</b>	<b>124,400</b>	<b>111,900</b>	<b>110,400</b>	<b>111,700</b>	<b>113,100</b>	<b>115,600</b>	<b>118,800</b>	<b>122,500</b>	<b>126,400</b>	<b>700</b>	<b>0.06%</b>
Mining and logging	1,000	1,000	900	700	800	800	900	1,000	1,000	1,000	900	(100)	-1.05%
Construction	8,100	8,200	7,400	5,700	5,300	5,200	5,200	5,300	5,700	6,100	6,500	(1,600)	-2.18%
Manufacturing	20,300	19,800	17,700	12,600	12,200	12,200	12,300	12,600	13,000	13,200	13,500	(6,800)	-4.00%
Durable goods	16,300	15,800	13,700	8,800	8,400	8,400	8,500	8,600	8,800	8,700	8,800	(7,500)	-5.98%
Nondurable goods	4,000	4,000	3,900	3,700	3,800	3,800	3,900	4,000	4,200	4,500	4,700	700	1.63%
Trade, transportation, and utilities	29,100	29,300	28,800	26,700	26,300	26,700	27,200	28,100	28,600	29,600	30,000	900	0.31%
Retail trade	19,700	19,900	19,400	18,100	18,000	18,300	18,600	19,100	19,300	20,000	20,400	700	0.35%
Food and beverage stores	3,900	4,000	4,000	3,900	3,900	4,000	4,000	4,000	4,200	4,300	4,500	600	1.44%
Transportation, warehousing, and utilities	3,400	3,200	3,200	2,900	2,800	3,000	3,100	3,300	3,400	3,400	3,400	-	0.00%
Information	3,700	4,000	3,900	3,600	3,300	3,300	3,300	3,400	3,500	3,200	3,000	(700)	-2.08%
Financial activities	8,300	8,400	8,100	7,600	7,400	7,100	7,200	7,400	7,400	7,700	7,700	(600)	-0.75%
Professional and business services	16,400	16,300	16,000	14,300	14,600	14,900	15,200	15,200	16,100	16,500	17,700	1,300	0.77%
Education and health services	19,600	20,700	21,400	21,900	21,900	22,400	22,600	22,700	23,200	24,100	25,000	5,400	2.46%
Leisure and hospitality	14,300	14,900	15,100	14,100	13,800	14,300	14,600	15,200	15,600	16,300	16,900	2,600	1.68%
Accommodation and food services	12,200	12,800	13,000	12,200	12,000	12,500	12,800	13,300	13,700	14,300	14,800	2,600	1.95%
Accommodation	1,500	1,500	1,600	1,500	1,400	1,500	1,500	1,600	1,700	1,700	1,700	200	1.26%
Food services and drinking places	10,700	11,300	11,400	10,700	10,600	11,000	11,300	11,700	12,000	12,600	13,100	2,400	2.04%
Other services	5,100	5,200	5,200	5,000	4,900	4,900	4,800	4,800	4,800	5,000	5,300	200	0.39%
<b>Government</b>	<b>28,700</b>	<b>29,500</b>	<b>30,600</b>	<b>30,700</b>	<b>31,000</b>	<b>30,000</b>	<b>29,300</b>	<b>28,800</b>	<b>29,200</b>	<b>29,700</b>	<b>30,300</b>	<b>1,600</b>	<b>0.54%</b>

Source: OED; compiled by FCS GROUP. Employment includes workers "covered" by unemployment insurance.

Appendix B Florence Fact Sheet



Quality Information, Informed Choices  
**Labor Market Information**

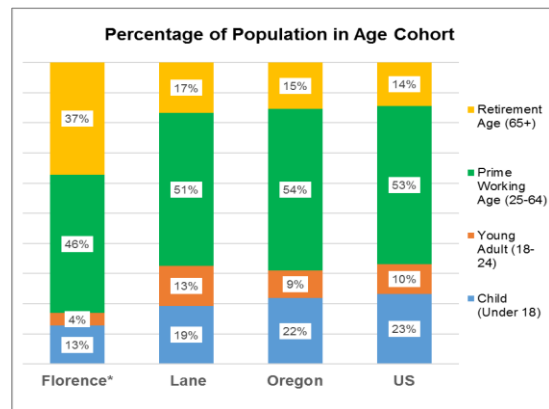
State of Oregon • Employment Department • www.QualityInfo.org

**Florence Fact Sheet 2**

Date: 6/20/17

Age Cohort	Florence*	Lane	Oregon	US
<b>Total population</b>	16,617	357,060	3,939,233	316,515,021
Child (Under 18)	13%	19%	22%	23%
Young Adult (18-24)	4%	13%	9%	10%
Prime Working Age (25-64)	46%	51%	54%	53%
Retirement Age (65+)	37%	17%	15%	14%

Source: US Census, 2011-2015 ACS S0101, S0601



Educational Attainment	Florence*	Lane	Oregon	US
<b>Population 25 &amp; over</b>	13,810	241,134	2,714,972	211,462,522
Did not graduate high school	8.9%	8.9%	10.2%	13.3%
High school graduate	26.8%	25.0%	24.3%	27.8%
Some college or Associate's	42.4%	37.8%	34.7%	29.2%
Bachelor's degree or above	22.0%	28.4%	30.8%	29.7%

Source: US Census, 2011-2015 ACS S1501

Child Care	Florence* (incl. Mapleton School District Area)
<b>Availability</b>	
Number of Children Under 5	686
Visible Child Care Slots for Children Under 5	118
Slots in Child Care Centers for Children Under 3	0
<b>Cost</b>	
Median Annual Price of toddler care in a child care center**	\$6,900
Percent of Median Household Income	20%
Percent of Minimum Wage Income	34%

Source: Oregon DOE Early Learning Division, 2016 Oregon Child Care Market Price Study

Housing Costs	Florence (City)	Oregon
<b>Owner Occupied Housing</b>		
Median Household Income	\$44,509	\$67,070
Median Monthly Housing Costs	\$615	\$1,194
Housing Costs as a Percentage of Income	17%	21%
<b>Renter Occupied Housing</b>		
Median Household Income	\$28,365	\$32,513
Median Monthly Housing Costs	\$788	\$907
Housing Costs as a Percentage of Income	33%	33%

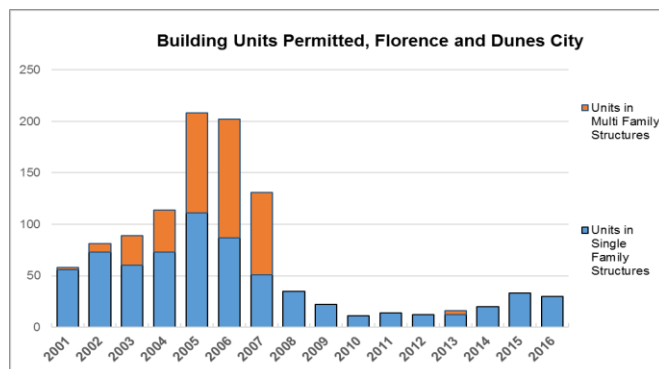
Source: US Census, 2011-2015 ACS S2503

Building Units Permitted, Florence and Dunes City	Single Family	Multi Family	Total
<b>Year</b>			
2001	56	2	58
2002	73	8	81
2003	60	29	89
2004	73	41	114
2005	111	97	208
2006	87	115	202
2007	51	80	131
2008	35	0	35
2009	22	0	22
2010	11	0	11
2011	14	0	14
2012	12	0	12
2013	12	4	16
2014	20	0	20
2015	33	0	33
2016	30	0	30

Source: Census Bureau SOCDS Building Permits Database

\* Florence Labor Shed (6 Census Tract area: Lane County Tract 5, 7.02, 7.05-08)

\*\* Because sample size is limited, it is difficult to make estimates of the average cost of care at a sub-county level. Child care prices in Florence are in the lowest of the three price categories for the state. In that category, the median price of center care for a toddler is \$6,900 annually.



Appendix C-1 Retail Inflow/Outflow Analysis, 30 Minute Trade Area

**Retail Marketplace Profile for Florence**

**30-minute drive time from Hwy. 101 @ City Hall, Florence, OR**

**Demographics within a 30 Minute Drive Time**

2016 Population	16,104
2016 Households	7,888
2016 Median Disposable Income	\$30,569
2016 Per Capita Income	\$25,624

**Florence Retail Marketplace Profile within a 30 Minute Drive Time**

Industry Group	NAICS	Demand (Retail Potential)	Supply (Retail Sales)	Retail Outflow or (Inflow)	Supportable Net New SF with 50% Outflow Capture
Motor Vehicle Sales & Parts Dealers	441	\$47,304,083	\$23,315,562	<b>\$23,988,521</b>	
Furniture & Home Furnishings Stores	442	\$5,920,911	\$6,457,993	(\$537,082)	0
Electronics & Appliances Stores	443	\$10,328,903	\$4,713,785	<b>\$5,615,118</b>	10,000
Bdlg. Materials, Garden Eqpt. & Supply Stores	444	\$12,824,464	\$14,729,528	(\$1,905,064)	0
Food & Beverage Stores	445	\$36,293,822	\$24,227,472	<b>\$12,066,350</b>	21,000
Health & Personal Care Stores	446 & 4461	\$12,874,345	\$13,541,563	(\$667,218)	0
Gasoline Stations	447 & 4471	\$13,266,466	\$9,843,738	<b>\$3,422,728</b>	6,000
Clothing & Clothing Accessories Stores	448	\$8,848,499	\$5,784,534	<b>\$3,063,965</b>	5,000
Sporting Goods, Hobby, Book & Music Stores	451	\$6,465,132	\$3,252,869	<b>\$3,212,263</b>	6,000
General Merchandise Stores	452	\$38,301,385	\$44,338,741	(\$6,037,356)	0
Miscellaneous Store Retailers	453	\$3,197,144	\$1,967,079	<b>\$1,230,065</b>	2,000
Nonstore Retailers	454	\$3,197,144	\$1,967,079	<b>\$1,230,065</b>	2,000
Food Services & Drinking Places	722	\$20,525,774	\$32,916,645	(\$12,390,871)	0
<b>Total</b>		\$219,348,072	\$187,056,588	\$32,291,484	
<b>Total, excluding Motor Vehicle Sales &amp; Parts</b>		<b>\$172,043,989</b>	<b>\$163,741,026</b>	<b>\$8,302,963</b>	<b>52,000</b>

\* assumes 5% vacancy rate and \$300 in annual sales per net square foot of floor area.

NAICS = North American Industrial Classification System.

Source: ESRI, Marketplace Profile; Urban Land Institute, Dollars and Cents of Shopping Centers; FCS GROUP.

## Appendix C-2 Retail Inflow/Outflow Analysis, Future Growth Potential

### Analysis of 20-year Retail Development Potential from New Growth in Florence

Demographics		Source	
2016 Population	8,680	PSU pop. Estimates	
Projected 2036 Population	10,486	assumes 0.9% annual growth rate	
Est. 2016 Per Capita Income	\$24,827	2014 ACS data, adjusted by 1.9%	
Projected 2036 Per Capita Income	\$33,939	assumes 1.5% annual real growth rate	
Est. 2015 Aggregate Gross Income	\$215,494,222	calculated	
Proj. 2026 Aggregate Gross Income	\$355,879,852	calculated	
Change in Annual Gross Income: 2036	\$140,385,630	calculated	

Retail Store Group	Analysis of Supportable Sales				Supportable Development <sup>4</sup>		
	Percent of Gross Income <sup>1</sup>	Proj. Net New Sales from Pop.	Annual Sales Per SF <sup>2</sup>	Inflow Sales as % of Total Sales <sup>3</sup>	From Growth	From Inflow	Total Sq. Ft.
Food Stores	7.62%	\$ 10,697,385	\$680	18%	16,559	4,710	21,269
Eating & Drinking	5.21%	\$ 7,314,091	\$370	34%	20,808	12,156	32,965
Apparel and Services	3.37%	\$ 4,730,996	\$500	18%	9,960	2,833	12,793
Household Furnishings & Appliances	3.07%	\$ 4,309,839	\$370	18%	12,261	3,487	15,749
Personal Care Products & Services	1.22%	\$ 1,712,705	\$500	18%	3,606	1,026	4,631
Miscellaneous Retail	1.61%	\$ 2,260,209	\$270	18%	8,812	2,506	11,318
<b>Total</b>	<b>22.10%</b>	<b>\$ 31,025,224</b>			<b>72,006</b>	<b>26,718</b>	<b>98,725</b>
<b>Supportable Acres (net buildable)</b>							<b>7.6</b>

<sup>1</sup> Bureau of Economic Analysis, Consumer Expenditure Survey, reflects in-store purchases only.

<sup>2</sup> derived from Urban Land Institute, Dollars and Cents of Retail Stores.

<sup>3</sup> estimated based on ESRI Retail Place Profile Report (Appendix B).

<sup>4</sup> assumes 5% vacancy allowance.

Appendix D: Florence Lodging Establishments

Facility	Rooms	Meeting Facilities	Avg. Daily Room Rates	Amenities
Economy Inn	29	No	\$85	Free cable, indoor pool, spa
Quality Inn	52	No	\$123-\$146	Business center, continental breakfast, free wi-fi
Silver Sands Motel	48	No	\$79	Barbecue grills, dog friendly,
Villa West Motel	22	No	\$50-\$115	Wi-fi, recently renovated
Landmark Inn	12	No	\$75-\$145	Spa, continental breakfast, wi-fi,
River House Inn	40	Yes	\$102-\$199	Free wi-fi, continental breakfast, river views, located in Old Town,
Lighthouse Inn	27	No	\$89	
Old Town Inn	40	No	\$92-\$104	Free wi-fi, continental breakfast, located in Old Town,
Best Western Pier Point Inn	55	Yes	\$121-\$169	Free wi-fi, full breakfast, pool
Driftwood Shores	127	Yes	\$114-\$345	Free wi-fi, pool, children's play room
Three Rivers Casino Hotel	93	Yes	\$104-\$109	Free wi-fi, shuttle bus, restaurant
Le Chateau Inn	49	No	\$69-\$98	Free wi-fi, pool, spa, sauna, free continental breakfast
<b>Bed &amp; Breakfasts</b>				
Edwin K Bed & Breakfast	6	No	\$135-\$240	Five-course breakfast, free wi-fi, discounts at local shops

Source: Hotels.com and TripAdvisor.com, survey by FCS GROUP, 10/17/2017.

Appendix E-1: Florence Employment Land Need Scenario A

Projected Employment & Land Need								
Scenario A: Baseline 20-year Employment Land Need, Florence UGB								
Job/Use Type	20-Year Job Growth Forecast <sup>1</sup>	Avg. FAR	Jobs Per Acre <sup>2</sup>	Building Floor Area Per Job <sup>2</sup>	20-Year Building Need (floor area SF)	Refill/ Redevelopment Share Capture	Refill/ Redevelopment Floor Area	20-Year Land Need (buildable acres) <sup>3</sup>
<b>Private Employment</b>								
Industrial	77	0.15	10	1,500	115,000	5%	5,750	8.4
Services	883							
Lodging	37	0.25		1000	37,000	10%	3,700	3.5
Food Services	148	0.30		400	59,000	10%	5,900	4.7
Education Services	44	0.20		500	22,000	10%	2,200	2.6
Office/Other Services	654	0.30		300	196,000	10%	19,600	15.5
Retail	115	0.30		500	58,000	10%	5,800	4.6
<b>Private Subtotal</b>	<b>1,076</b>				<b>487,000</b>		<b>42,950</b>	<b>39.3</b>
<b>Local Government<sup>4</sup></b>	<b>7</b>	<b>0.30</b>		<b>500</b>	<b>3,000</b>	<b>100%</b>	<b>3,000</b>	<b>-</b>
<b>Total</b>	<b>1,082</b>				<b>490,000</b>	<b>9%</b>	<b>45,950</b>	<b>39.3</b>

Notes:

<sup>1</sup> Derived from Table IV-1. Excludes home-based workers.

<sup>2</sup> Assumptions for job densities reflect "covered jobs" and are generally consistent with Oregon DLCD, Industrial and Other Employment Land Analysis Handbook, 2001.

<sup>3</sup> Assumes net land area is adjusted upwards by 15% for public road circulation, easements and utilities.

<sup>4</sup> Excludes special site requirements for city, school district, county, state and federal governments.

Source: FCS GROUP based on assumptions stated above.

Appendix E-2: Florence Employment Land Need Scenario B

Projected Employment Land Need								
Scenario B: Strategic Growth 20-year Employment Land Need, Florence UGB								
Job/Use Type	20-Year Job Growth Forecast <sup>1</sup>	Avg. FAR	Jobs Per Acre <sup>2</sup>	Building Floor Area Per Job <sup>2</sup>	20-Year Building Need (floor area SF)	Refill/ Redevelopment Share Capture	Refill/ Redevelopment Floor Area	20-Year Land Need (buildable acres) <sup>3</sup>
<b>Private Employment</b>								
Industrial*	177	0.15	10	1,500	265,000	5%	13,250	19.3
Services	883							
Lodging	37	0.25		1000	37,000	10%	3,700	3.5
Food Services	148	0.30		400	59,000	10%	5,900	4.7
Education Services	44	0.20		500	22,000	10%	2,200	2.6
Office/Other Services	654	0.30		300	196,000	10%	19,600	15.5
Retail**	219	0.30		500	110,000	5%	5,500	9.2
<b>Private Subtotal</b>	<b>1,280</b>				<b>689,000</b>		<b>50,150</b>	<b>54.9</b>
<b>Local Government</b> <sup>4</sup>	<b>7</b>	<b>0.30</b>		<b>500</b>	<b>3,000</b>	<b>100%</b>	<b>3,000</b>	<b>-</b>
<b>Total</b>	<b>1,286</b>				<b>692,000</b>	<b>8%</b>	<b>53,150</b>	<b>54.9</b>

Notes:

<sup>1</sup> Derived from Appendix D1. Excludes home-based workers, and includes strategic growth assumptions as follows:

\* Assumes 77 workers (base case) plus 100 additional jobs in target market industrial businesses.

\*\* Assumes 115 workers (base case) plus 104 additional "pent up" jobs in target market retail businesses.

<sup>2</sup> Assumptions for job densities reflect "covered jobs" and are generally consistent with Oregon DLCDC, Industrial and Other Employment Land

<sup>3</sup> Assumes net land area is adjusted upwards by 15% for public road circulation, easements and utilities.

<sup>4</sup> Excludes special site requirements for city, school district, county, state and federal governments.

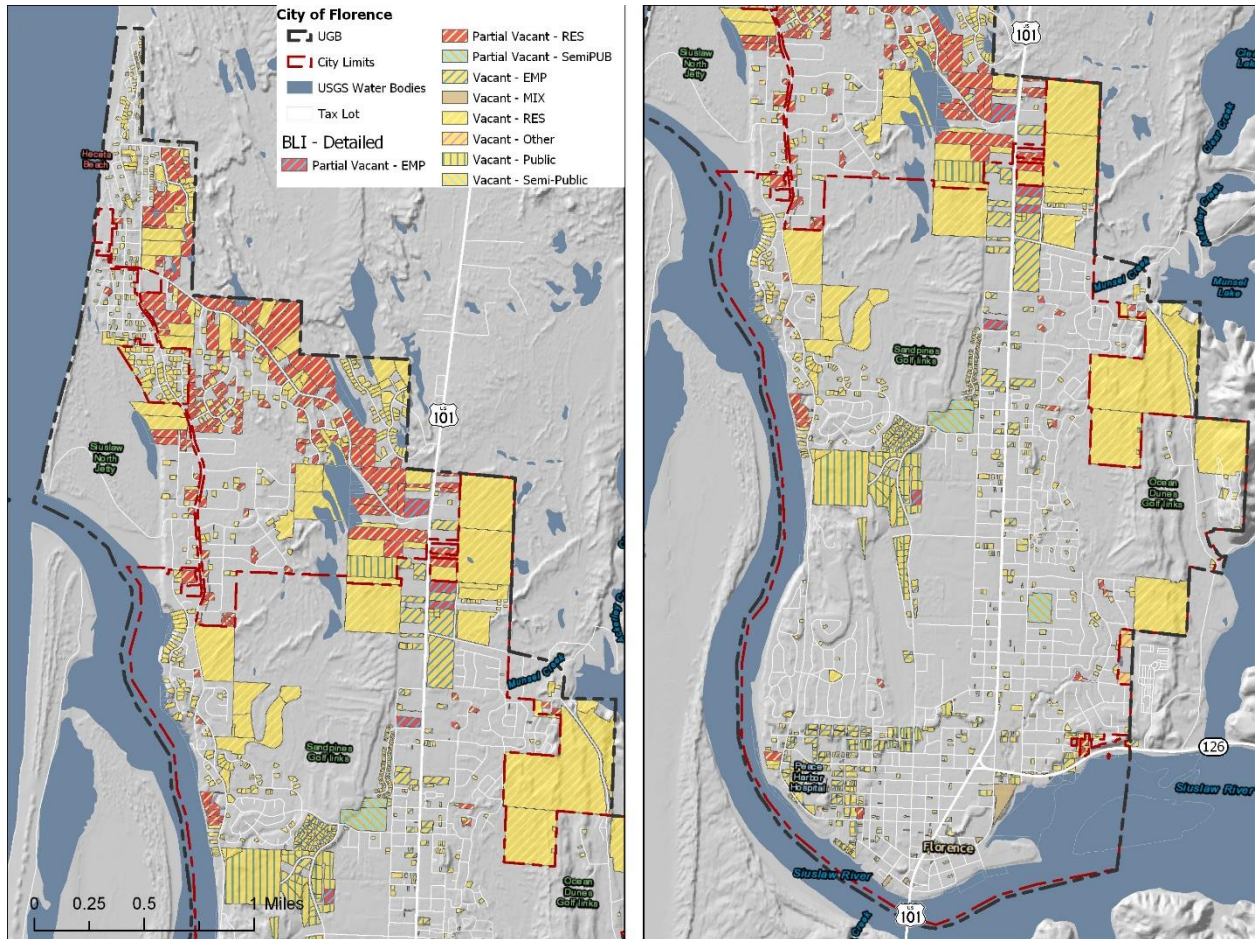
Source: FCS GROUP based on assumptions stated above.

Appendix F: Economic and Financial Feasibility Analysis

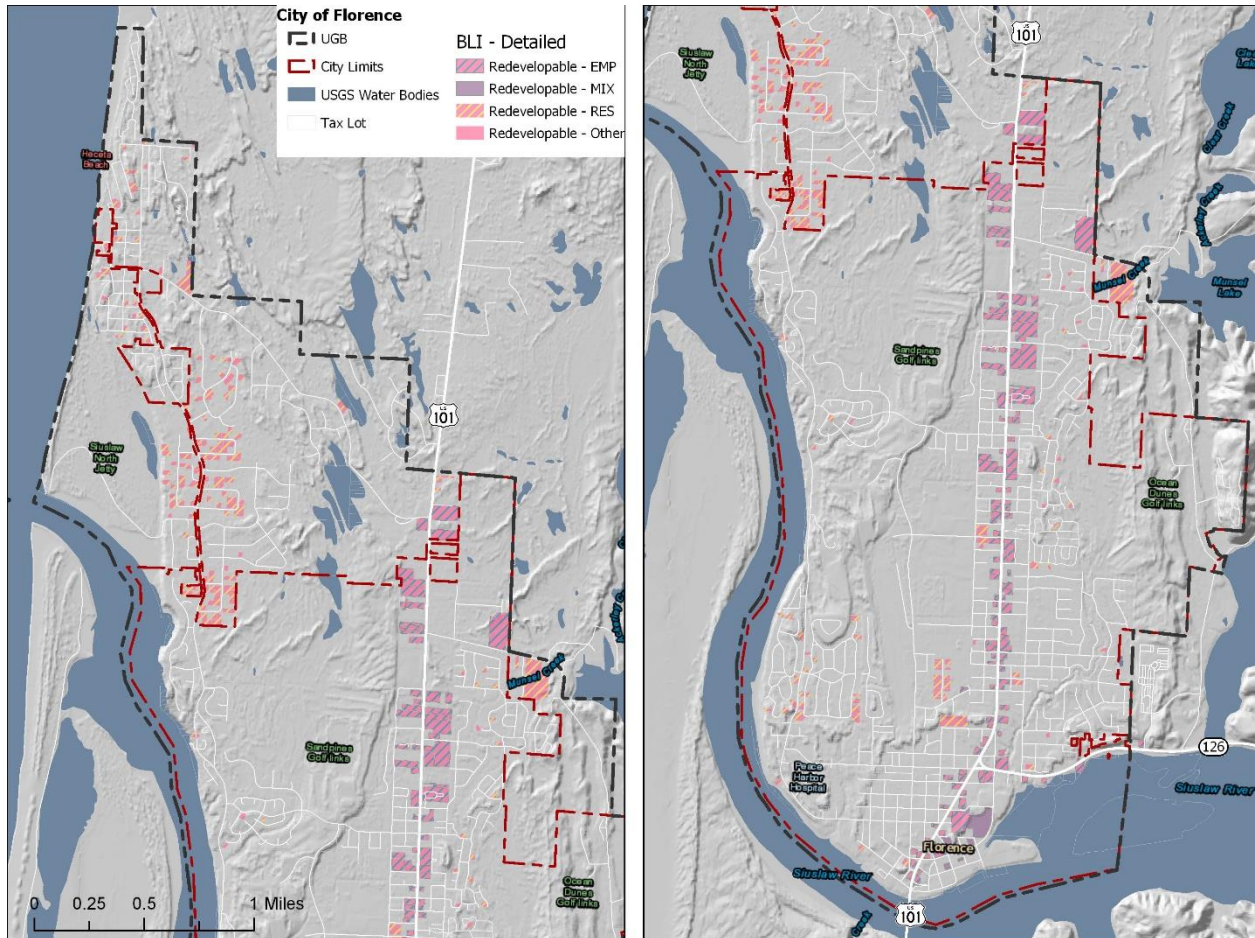
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Appendix G-1 Florence Buildable Vacant Land Inventory Maps



Appendix G-2 Florence Redevelopment Land Inventory Maps



Appendix G-3 Florence Buildable Land Inventory Summary

Buildable Land Inventory within City of Florence, 2017										
Residential Zones	Parcels					Acres				
	< 1 acre	1 to 5 acres	5 to 10 acres	> 10 acres	Subtotal Parcels	< 1 acre	1 to 5 acres	5 to 10 acres	> 10 acres	Subtotal Acres
Vacant, Private*	436	8	3	9	456	74.3	11.0	18.3	161.9	265.6
Vacant, Public/Semi Public*	37	2	0	0	39	7.7	1.8	0.0	0.0	9.5
Part Vacant, Private	11	6	0	0	17	3.4	3.6	0.0	0.0	7.0
Part Vacant, Public/Semi-Public	0	1	1	1	3	0.0	2.8	6.0	11.3	20.2
Redevelopable	88	2	1	0	91	25.6	4.6	0.0	0.0	30.2
<b>Total</b>	<b>572</b>	<b>19</b>	<b>5</b>	<b>10</b>	<b>606</b>	<b>111.1</b>	<b>23.9</b>	<b>24.3</b>	<b>173.2</b>	<b>332.5</b>
Employment Zones	Parcels					Acres				
	< 1 acre	1 to 5 acres	5 to 10 acres	> 10 acres	Subtotal Parcels	< 1 acre	1 to 5 acres	5 to 10 acres	> 10 acres	Subtotal Acres
Vacant, Private*	234	14	1	1	250	51.1	23.4	7.0	13.3	94.8
Vacant, Public/Semi Public*	74	21	0	1	96	23.2	35.5	0.0	32.5	91.1
Part Vacant, Private	0	4	0	0	4	0.0	7.5	0.0	0.0	7.5
Part Vacant, Public/Semi-Public	0	0	0	2	2	0.0	0.0	0.0	53.8	53.8
Redevelopable	5	0	1	0	6	49.3	50.5	12.7	0.0	112.5
<b>Total</b>	<b>313</b>	<b>39</b>	<b>2</b>	<b>4</b>	<b>358</b>	<b>123.7</b>	<b>116.8</b>	<b>19.7</b>	<b>99.6</b>	<b>359.8</b>
Mixed Use Zones	Parcels					Acres				
	< 1 acre	1 to 5 acres	5 to 10 acres	> 10 acres	Subtotal Parcels	< 1 acre	1 to 5 acres	5 to 10 acres	> 10 acres	Subtotal Acres
Vacant, Private*	9	1	1	0	11	1.9	2.8	5.1	0.0	9.8
Vacant, Public/Semi Public*	1	1	0	0	2	0.2	0.9	0.0	0.0	1.2
Part Vacant, Private	0	0	0	0	0	0.0	0.0	0.0	0.0	0.0
Part Vacant, Public/Semi-Public	0	0	0	0	0	0.0	0.0	0.0	0.0	0.0
Redevelopable	5	0	1	0	6	2.1	0.0	5.4	0.0	7.6
<b>Total</b>	<b>15</b>	<b>2</b>	<b>2</b>	<b>0</b>	<b>19</b>	<b>4.3</b>	<b>3.7</b>	<b>10.6</b>	<b>0.0</b>	<b>18.5</b>
Notes:										
* identified as vacant in Lane County assessor data										
Source: GIS analysis by Fregonese Associates; analysis by FCS GROUP.										

Appendix G-3 Florence Vacant and Part Vacant Private Buildable Land Inventory

**Vacant**

Part/Vacant Private Parcels In the City of Florence, 2017			Parcels/Tax Lots												All Parcels			
Zoning Type	Gen. Class	Zoning Description	Residential				Employment				Public					Semi-Public		
			< 1 acre	1 to 5 acres	5 to 10 acres	> 10 acres	< 1 acre	1 to 5 acres	5 to 10 acres	> 10 acres	< 1 acre	1 to 5 acres	5 to 10 acres	> 10 acres	< 1 acre	1 to 5 acres	5 to 10 acres	> 10 acres
City of Florence Zoning:																		
AD	Emp.	AIRPORT DEVELOPMENT															1	
C	Emp.	COMMERCIAL																
CV	Res.	COAST VILLAGE																
H	Emp.	HIGHWAY DISTRICT					1										1	
I	Emp.	PACIFIC VIEW BUSINESS PARK DISTRICT																
IP	Emp.	PACIFIC VIEW BUSINESS PARK DISTRICT					1										1	
LI	Emp.	LIMITED INDUSTRIAL																
M	Emp.	MARINE DISTRICT										1					1	
MH	Res.	MOBILE HOME/MANUFACTURED HOME																
MSA	Emp.	MAIN STREET																
MSB	Emp.	MAIN STREET/AREA B																
NCD	Emp.	NORTH COMMERCIAL DISTRICT					1										1	
OS	Other	OPEN SPACE																
OTB	Mixed	OLD TOWN DISTRICT																
OTC	Mixed	OLD TOWN AREA C																
OTDA	Mixed	OLD TOWN DISTRICT/AREA A																
POI	Emp.	PROFESSIONAL OFFICE/INSTITUTIONAL																
RM	Res.	MULTIPLE FAMILY RESIDENTIAL											1			1	2	
RR	Res.	RESTRICTED RESIDENTIAL	7	2													10	
RS	Res.	SINGLE FAMILY RESIDENTIAL	4	4													8	
SID	Emp.	SERVICE/INDUSTRIAL DISTRICT					1										1	
WF/M	Emp.	WATERFRONT/MARINE																
Total			11	6	-	-	-	4	-	-	-	-	2	-	1	1	1	
			17				4				2				3			

Notes:  
Source: GIS analysis by Fregonese Associates; analysis by FCS GROUP.

**Part Vacant**

Vacant Private-Owned Parcels In the City of Florence, 2017			Parcels/ Tax Lots					Land Area (acres)				
Zoning Type	Gen. Class	Zoning Description	Vacant*				Subtotal Parcels	Vacant*				Subtotal Acres
			< 1 acre	1 to 5 acres	5 to 10 acres	> 10 acres		< 1 acre	1 to 5 acres	5 to 10 acres	> 10 acres	
City of Florence Zoning:												
AD	Emp.	AIRPORT DEVELOPMENT	2				2	0.2	0.0	0.0	0.0	0.2
C	Emp.	COMMERCIAL	82				82	16.0	0.0	0.0	0.0	16.0
CV	Res.	COAST VILLAGE	11				11	1.2	0.0	0.0	0.0	1.2
H	Emp.	HIGHWAY DISTRICT	48	4			52	11.8	8.0	0.0	0.0	19.7
I	Emp.	PACIFIC VIEW BUSINESS PARK DISTRICT	2	1			3	0.9	1.4	0.0	0.0	2.3
IP	Emp.	PACIFIC VIEW BUSINESS PARK DISTRICT	3				3	1.3	0.0	0.0	0.0	1.3
LI	Emp.	LIMITED INDUSTRIAL	3				3	1.5	0.0	0.0	0.0	1.5
M	Emp.	MARINE DISTRICT					-	0.0	0.0	0.0	0.0	-
MH	Res.	MOBILE HOME/MANUFACTURED HOME	39	1		2	42	8.9	1.9	0.0	35.2	46.0
MSA	Emp.	MAIN STREET	15				15	1.9	0.0	0.0	0.0	1.9
MSB	Emp.	MAIN STREET/AREA B	9				9	1.6	0.0	0.0	0.0	1.6
NCD	Emp.	NORTH COMMERCIAL DISTRICT	4	1	1	1	7	2.1	4.4	7.0	13.3	26.8
OS	Other	OPEN SPACE					-	0.0	0.0	0.0	0.0	-
OTB	Mixed	OLD TOWN DISTRICT	4				4	0.7	0.0	0.0	0.0	0.7
OTC	Mixed	OLD TOWN AREA C			1		1	0.0	0.0	5.1	0.0	5.1
OTDA	Mixed	OLD TOWN DISTRICT/AREA A	5				5	1.2	0.0	0.0	0.0	1.2
POI	Emp.	PROFESSIONAL OFFICE/INSTITUTIONAL	65	5			70	13.3	4.4	0.0	0.0	17.7
RM	Res.	MULTIPLE FAMILY RESIDENTIAL	135				135	14.5	0.0	0.0	0.0	14.5
RR	Res.	RESTRICTED RESIDENTIAL	165	3		2	170	35.7	2.5	0.0	17.6	55.8
RS	Res.	SINGLE FAMILY RESIDENTIAL	86	4	3	5	98	14.0	6.7	18.3	109.1	148.0
SID	Emp.	SERVICE/INDUSTRIAL DISTRICT	1	3			4	0.6	5.2	0.0	0.0	5.8
WF/M	Emp.	WATERFRONT/MARINE					-	0.0	0.0	0.0	0.0	-
Multiple Zoning:							-	0.0	0.0	0.0	0.0	-
RM/C	Mixed	RM					-	0.0	0.0	0.0	0.0	-
NCD/SID	Mixed	NCD		1			1	0.0	2.3	0.0	0.0	2.3
	Mixed	SID		**			-	0.0	0.4	0.0	0.0	0.4
Total			679	23	5	10	717	127.4	37.1	30.4	175.2	370.2

Notes:  
\* identified as vacant in Lane County assessor data  
\*\* tax lot with multiple zoning  
Source: GIS analysis by Fregonese Associates; analysis by FCS GROUP.

Appendix G-4 Vacant and Part Vacant Public/Semi-Public Buildable Land Inventory

**Vacant**

Vacant Public and Semi-Public (non profit) Owned Parcels in the City of Florence, 2017			Public								Semi-Public								Subtotal Parcels	
Parcels/Tax Lots	Zoning Type:	Gen. Class	Zoning Description	Vacant*				Other (non vacant)				Vacant*				Other (non vacant)				
				< 1 acre	1 to 5 acres	5 to 10 acres	> 10 acres	< 1 acre	1 to 5 acres	5 to 10 acres	> 10 acres	< 1 acre	1 to 5 acres	5 to 10 acres	> 10 acres	< 1 acre	1 to 5 acres	5 to 10 acres	> 10 acres	
City of Florence Zoning:	AD	Emp.	AIRPORT DEVELOPMENT	4	2						1									7
	C	Emp.	COMMERCIAL	2				3	2			3				13		1		24
	CV	Res.	COAST VILLAGE												6					6
	H	Emp.	HIGHWAY DISTRICT	8				4	1			1			5	4				23
	I	Emp.	PACIFIC VIEW BUSINESS PARK DISTRICT	3	9															12
	IP	Emp.	PACIFIC VIEW BUSINESS PARK DISTRICT	13	6			6			1				1					26
	LI	Emp.	LIMITED INDUSTRIAL			1				1										2
	M	Emp.	MARINE DISTRICT		1				1											2
	MH	Res.	MOBILE HOME/MANUFACTURED HOME					2	1						15					18
	MSA	Emp.	MAIN STREET	5				1	2			3			2					13
	MSB	Emp.	MAIN STREET/AREA B	1				7				2			1					11
	NCD	Emp.	NORTH COMMERCIAL DISTRICT	4				1								1				6
	OS	Other	OPEN SPACE	0				14	3	1										18
	OTB	Mixed	OLD TOWN DISTRICT												2					2
	OTC	Mixed	OLD TOWN AREA C	1	1				1											3
	OTDA	Mixed	OLD TOWN DISTRICT/AREA A					8							3					11
	POI	Emp.	PROFESSIONAL OFFICE/INSTITUTIONAL	3	1			1	1			22	2		8	6				44
	RM	Res.	MULTIPLE FAMILY RESIDENTIAL	7	1			5	4	2	2	9			13	3				46
	RR	Res.	RESTRICTED RESIDENTIAL	13				28	4	1	1	2			60	1				110
	RS	Res.	SINGLE FAMILY RESIDENTIAL	3	1			6	2	2	2	3			88					105
	SID	Emp.	SERVICE/INDUSTRIAL DISTRICT																	-
	WF/M	Emp.	WATERFRONT/MARINE	0				3	6		1									10
Multiple Zoning:	RM/C	Mixed	RM																	-
	RS/LI	Mixed	RS					1												1
	AD/LI	Mixed	AD									1								1
	RS/MH	Mixed	RS									1								1
	MSB/MSA	Mixed	MSB					1												1
	OTB/OTC	Mixed	OTB																	-
	RR/RS	Mixed	RR												1					1
				67	22	-	1	91	28	5	9	45	2	-	-	218	15	1	-	504
																				90
																				133
																				47
																				234

Notes:  
\* identified as vacant in Lane County assessor data

**Part Vacant**

Part Vacant Public and Semi-Public Parcels in the City of Florence, 2017			Partial Vacant																Subtotal Acres		
Buildable Acres	Zoning Type:	Gen. Class	Zoning Description	Residential				Employment				Public				Semi-Public					
				< 1 acre	1 to 5 acres	5 to 10 acres	> 10 acres	< 1 acre	1 to 5 acres	5 to 10 acres	> 10 acres	< 1 acre	1 to 5 acres	5 to 10 acres	> 10 acres	< 1 acre	1 to 5 acres	5 to 10 acres	> 10 acres		
City of Florence Zoning:	AD	Emp.	AIRPORT DEVELOPMENT												25.2					25.2	
	C	Emp.	COMMERCIAL																		0.0
	CV	Res.	COAST VILLAGE																		0.0
	H	Emp.	HIGHWAY DISTRICT					1.5													1.5
	I	Emp.	PACIFIC VIEW BUSINESS PARK DISTRICT																		0.0
	IP	Emp.	PACIFIC VIEW BUSINESS PARK DISTRICT					2.0													2.0
	LI	Emp.	LIMITED INDUSTRIAL																		0.0
	M	Emp.	MARINE DISTRICT												28.7						28.7
	MH	Res.	MOBILE HOME/MANUFACTURED HOME																		0.0
	MSA	Emp.	MAIN STREET																		0.0
	MSB	Emp.	MAIN STREET/AREA B																		0.0
	NCD	Emp.	NORTH COMMERCIAL DISTRICT					2.0													2.0
	OS	Other	OPEN SPACE																		0.0
	OTB	Mixed	OLD TOWN DISTRICT																		0.0
	OTC	Mixed	OLD TOWN AREA C																		0.0
	OTDA	Mixed	OLD TOWN DISTRICT/AREA A																		0.0
	POI	Emp.	PROFESSIONAL OFFICE/INSTITUTIONAL																		0.0
	RM	Res.	MULTIPLE FAMILY RESIDENTIAL													2.8			11.3		14.2
	RR	Res.	RESTRICTED RESIDENTIAL	2.2	1.6																9.8
	RS	Res.	SINGLE FAMILY RESIDENTIAL	1.2	2.0																3.2
	SID	Emp.	SERVICE/INDUSTRIAL DISTRICT					2.0													2.0
	WF/M	Emp.	WATERFRONT/MARINE																		0.0
				3.4	3.6	0.0	0.0	0.0	7.5	0.0	0.0	0.0	0.0	0.0	0.0	53.8	0.0	2.8	6.0	11.3	88.5
																					7.0
																					7.5
																					53.8
																					20.2
																					88.5

Notes:  
Source: GIS analysis by Fregonese Associates; analysis by FCS GROUP.

## Appendix G-5 Florence Re-developable Land Inventory

### Parcels/Tax lots

Potential Redevelopment Parcels In the City of Florence, 2017			Redevelopable*								Subtotal Parcels
Parcels/Tax Lots			Ratio <= 0.5 (High Chance)				Ratio <=1 (Moderate Chance)				
Zoning Type:	Gen. Class	Zoning Description	< 1 acre	1 to 5 acres	5 to 10 acres	> 10 acres	< 1 acre	1 to 5 acres	5 to 10 acres	> 10 acres	
City of Florence Zoning:											
AD	Emp.	AIRPORT DEVELOPMENT									-
C	Emp.	COMMERCIAL	14				11	1			26
CV	Res.	COAST VILLAGE	4				1				5
H	Emp.	HIGHWAY DISTRICT	25	10	1		21	6			63
I	Emp.	PACIFIC VIEW BUSINESS PARK DISTRICT									-
IP	Emp.	PACIFIC VIEW BUSINESS PARK DISTRICT									-
LI	Emp.	LIMITED INDUSTRIAL									-
M	Emp.	MARINE DISTRICT									-
MH	Res.	MOBILE HOME/MANUFACTURED HOME	21				6				27
MSA	Emp.	MAIN STREET	10	1			10	2			23
MSB	Emp.	MAIN STREET/AREA B	1	1			2				4
NCD	Emp.	NORTH COMMERCIAL DISTRICT	3				1	2			6
OS	Other	OPEN SPACE									-
OTB	Mixed	OLD TOWN DISTRICT	2				1				3
OTC	Mixed	OLD TOWN AREA C			1						1
OTDA	Mixed	OLD TOWN DISTRICT/AREA A	1				1				2
POI	Emp.	PROFESSIONAL OFFICE/INSTITUTIONAL									-
RM	Res.	MULTIPLE FAMILY RESIDENTIAL	3	1			2	1			7
RR	Res.	RESTRICTED RESIDENTIAL	1				4				5
RS	Res.	SINGLE FAMILY RESIDENTIAL	24		1		22				47
SID	Emp.	SERVICE/INDUSTRIAL DISTRICT		2				1			3
WF/M	Emp.	WATERFRONT/MARINE									-
		Total	109	15	3	-	82	13	-	-	222
Notes:						127				95	

\* depicts ratio of Lane County Assessor improvement to land value.  
Source: GIS analysis by Fregonese Associates; analysis by FCS GROUP.

### Acres

Potential Redevelopment Parcels In the City of Florence, 2017			Redevelopable*								Acres
Buildable Acres			Ratio <= 0.5				Ratio <= 1				
Zoning Type:	Gen. Class	Zoning Description	< 1 acre	1 to 5 acres	5 to 10 acres	> 10 acres	< 1 acre	1 to 5 acres	5 to 10 acres	> 10 acres	
City of Florence Zoning:											
AD	Emp.	AIRPORT DEVELOPMENT									-
C	Emp.	COMMERCIAL	6.43				4.83	1.30			12.56
CV	Res.	COAST VILLAGE	1.09				0.26				1.34
H	Emp.	HIGHWAY DISTRICT	14.18	22.61	4.66		10.93	9.38			61.75
I	Emp.	PACIFIC VIEW BUSINESS PARK DISTRICT									-
IP	Emp.	PACIFIC VIEW BUSINESS PARK DISTRICT									-
LI	Emp.	LIMITED INDUSTRIAL									-
M	Emp.	MARINE DISTRICT									-
MH	Res.	MOBILE HOME/MANUFACTURED HOME	5.45				1.64				7.09
MSA	Emp.	MAIN STREET	4.07	1.64			4.39	4.26			14.36
MSB	Emp.	MAIN STREET/AREA B	0.36	1.01			0.65				2.02
NCD	Emp.	NORTH COMMERCIAL DISTRICT	2.55				0.94	2.74			6.23
OS	Other	OPEN SPACE									-
OTB	Mixed	OLD TOWN DISTRICT	1.01				0.63				1.64
OTC	Mixed	OLD TOWN AREA C			5.44						5.44
OTDA	Mixed	OLD TOWN DISTRICT/AREA A	0.24				0.24				0.49
POI	Emp.	PROFESSIONAL OFFICE/INSTITUTIONAL									-
RM	Res.	MULTIPLE FAMILY RESIDENTIAL	1.28	3.06			1.38	1.55			7.27
RR	Res.	RESTRICTED RESIDENTIAL	0.24				1.48				1.72
RS	Res.	SINGLE FAMILY RESIDENTIAL	6.69				6.11				12.80
SID	Emp.	SERVICE/INDUSTRIAL DISTRICT		5.40	8.09			2.13			15.62
WF/M	Emp.	WATERFRONT/MARINE									-
		Total	43.59	33.72	18.18	-	33.47	21.36	-	-	150.31
Notes:						95.49				54.83	150.31

\* depicts ratio of Lane County Assessor improvement to land value.  
Source: GIS analysis by Fregonese Associates; analysis by FCS GROUP.

## Appendix H Florence UGB Outside City Limits Land Inventory

### Summary

Buildable Land Inventory within UGB outside City of Florence, 2017										
Residential Zones		Parcels				Acres				
Category	< 1 acre	1 to 5 acres	5 to 10 acres	> 10 acres	Subtotal Parcels	< 1 acre	1 to 5 acres	5 to 10 acres	> 10 acres	Subtotal Acres
Vacant, Private*	301	28	11	4	344	67.8	37.5	45.3	103.6	254.3
Vacant, Public/Semi Public*	0	0	0	0	0	0.8	0.0	0.0	13.2	14.0
Part Vacant, Private	106	60	2	2	170	36.9	71.4	9.5	16.3	134.1
Part Vacant, Public/Semi-Public	0	0	0	0	0	0.0	0.0	0.0	0.0	0.0
Redevelopable	148	2	2	0	152	56.3	0.7	8.7	0.0	65.7
<b>Total</b>	<b>555</b>	<b>90</b>	<b>15</b>	<b>6</b>	<b>666</b>	<b>161.8</b>	<b>109.6</b>	<b>63.5</b>	<b>133.1</b>	<b>468.1</b>

Employment Zones		Parcels				Acres				
Category	< 1 acre	1 to 5 acres	5 to 10 acres	> 10 acres	Subtotal Parcels	< 1 acre	1 to 5 acres	5 to 10 acres	> 10 acres	Subtotal Acres
Vacant, Private*	2	3	0	0	5	0.3	3.8	0.0	0.0	4.1
Vacant, Public/Semi Public*	0	0	0	0	0	0.0	0.0	0.0	0.0	0.0
Part Vacant, Private	0	0	0	0	0	0.0	1.4	0.0	0.0	1.4
Part Vacant, Public/Semi-Public	0	0	0	0	0	0.0	0.0	0.0	0.0	0.0
Redevelopable	3	2	1	0	6	1.2	5.1	5.1	0.0	11.4
<b>Total</b>	<b>5</b>	<b>5</b>	<b>1</b>	<b>0</b>	<b>11</b>	<b>1.6</b>	<b>10.3</b>	<b>5.1</b>	<b>0.0</b>	<b>16.9</b>

Notes:  
\* identified as vacant in Lane County assessor data  
Source: GIS analysis by Fregonese Associates; analysis by FCS GROUP.

### Vacant Private Acres

		UGB Non City Acres			
Zoning Type:		< 1 acre	1 to 5 acres	5 to 10 acres	> 10 acres
<b>Lane County Zoning</b>					
Index	Zoning Type	Description			
C	C1	LIMITED COMMERCIAL DISTRICT			
C	C2	0.3	1.0		
C	CA	RURAL COMMERCIAL DISTRICT			
C	CT	TOURIST COMMERCIAL DISTRICT			
Open	F2	0.9	1.6		
I	M1	LIMITED INDUSTRIAL DISTRICT			
Open	NE	NATURAL ESTUARY			
Open	NR	0.1			
Open	PR	PARK AND RECREATION			
LDR	RA	29.1	17.3	18.7	103.6
M	RA/MH	38.5	19.6	26.6	
C	RC	RURAL COMMERCIAL			
LDR	RR	0.2	0.6		
LDR	RR1	RURAL RESIDENTIAL (1 ACRE MINIMUM)			
LDR	RR5	RURAL RESIDENTIAL (5 ACRE MINIMUM)			
		196.6	77.3	75.7	278.8
					628.4

**Part Vacant Acres**

UGB Non City Acres			Partial Vacant															
Zoning Type:			Residential				Employment				Public			Semi-Public				
			< 1 acre	1 to 5 acres	5 to 10 acres	> 10 acres	< 1 acre	1 to 5 acres	5 to 10 acres	> 10 acres	< 1 acre	1 to 5 acres	5 to 10 acres	> 10 acres	< 1 acre	1 to 5 acres	5 to 10 acres	> 10 acres
<b>Lane County Zoning</b>																		
Index	Zoning Type	Description																
C	C1	LIMITED COMMERCIAL DISTRICT																
C	C2	NEIGHBORHOOD COMMERCIAL DISTRICT						1.4										
C	CA	RURAL COMMERCIAL DISTRICT																
C	CT	TOURIST COMMERCIAL DISTRICT																
Open	F2	FOREST LAND DISTRICT																
I	M1	LIMITED INDUSTRIAL DISTRICT																
Open	NE	NATURAL ESTUARY																
Open	NR	NATURAL RESOURCE																
Open	PR	PARK AND RECREATION																
LDR	RA	SUBURBAN RESIDENTIAL DISTRICT	12.2	17.4	4.3	10.2												
M	RA/MH	SUBURBAN RESIDENTIAL / MOBILE HOME DISTRICT	24.7	54.1	5.1	6.1												
C	RC	RURAL COMMERCIAL																
LDR	RR	RURAL RESIDENTIAL DISTRICT																
LDR	RR1	RURAL RESIDENTIAL (1 ACRE MINIMUM)																
LDR	RR5	RURAL RESIDENTIAL (5 ACRE MINIMUM)																
			40.3	75.0	9.5	16.3	0.0	8.9	0.0	0.0	0.0	0.0	0.0	53.8	0.0	2.8	6.0	11.3
						141.1				8.9				53.8				20.2

**Vacant Public and Semi-Public Acres**

UGB Non City Acres			Public				Semi-Public											
Zoning Type:			Vacant		Other (non vacant)		Vacant		Other (non vacant)									
			< 1 acre	1 to 5 acres	5 to 10 acres	> 10 acres	< 1 acre	1 to 5 acres	5 to 10 acres	> 10 acres	< 1 acre	1 to 5 acres	5 to 10 acres	> 10 acres				
<b>Lane County Zoning</b>																		
Index	Zoning Type	Description																
C	C1	LIMITED COMMERCIAL DISTRICT																
C	C2	NEIGHBORHOOD COMMERCIAL DISTRICT																
C	CA	RURAL COMMERCIAL DISTRICT																
C	CT	TOURIST COMMERCIAL DISTRICT																
Open	F2	FOREST LAND DISTRICT							85.0									
I	M1	LIMITED INDUSTRIAL DISTRICT																
Open	NE	NATURAL ESTUARY																
Open	NR	NATURAL RESOURCE							0.5									
Open	PR	PARK AND RECREATION							0.0									
LDR	RA	SUBURBAN RESIDENTIAL DISTRICT	0.6			13.2			0.3				8.2	3.0				
M	RA/MH	SUBURBAN RESIDENTIAL / MOBILE HOME DISTRICT	0.2						0.7	0.1			7.5	1.1				
C	RC	RURAL COMMERCIAL																
LDR	RR	RURAL RESIDENTIAL DISTRICT											0.3	1.5				
LDR	RR1	RURAL RESIDENTIAL (1 ACRE MINIMUM)																
LDR	RR5	RURAL RESIDENTIAL (5 ACRE MINIMUM)							0.0									
			20.5	35.6	0.0	45.7	14.3	16.7	6.6	112.6	11.4	2.7	0.0	0.0	63.7	31.9	6.0	0.0

**Redevelopment Acres**

UGB Non City Acres			Redevelopable								
Zoning Type:			Ratio <= 0.5			Ratio <= 1					
			< 1 acre	1 to 5 acres	5 to 10 acres	> 10 acres	< 1 acre	1 to 5 acres	5 to 10 acres	> 10 acres	
<b>Lane County Zoning</b>											
Index	Zoning Type	Description									
C	C1	LIMITED COMMERCIAL DISTRICT			1.6						
C	C2	NEIGHBORHOOD COMMERCIAL DISTRICT			0.4						
C	CA	RURAL COMMERCIAL DISTRICT									
C	CT	TOURIST COMMERCIAL DISTRICT		0.3	3.5	5.1					
Open	F2	FOREST LAND DISTRICT									
I	M1	LIMITED INDUSTRIAL DISTRICT									
Open	NE	NATURAL ESTUARY									
Open	NR	NATURAL RESOURCE			0.3						
Open	PR	PARK AND RECREATION									
LDR	RA	SUBURBAN RESIDENTIAL DISTRICT			2.1			25.2			
M	RA/MH	SUBURBAN RESIDENTIAL / MOBILE HOME DISTRICT			27.1	0.3		1.4	0.4		
C	RC	RURAL COMMERCIAL			0.6						
LDR	RR	RURAL RESIDENTIAL DISTRICT						0.6		4.5	
LDR	RR1	RURAL RESIDENTIAL (1 ACRE MINIMUM)									
LDR	RR5	RURAL RESIDENTIAL (5 ACRE MINIMUM)									
				74.3	39.1	27.5	0.0	60.6	21.8	4.5	0.0
								140.9			86.8



**Developed and Unbuildable Acres**

UGB Non City Acres			Developed				Unbuildable			
Zoning Type:			< 1 acre	1 to 5 acres	5 to 10 acres	> 10 acres	< 1 acre	1 to 5 acres	5 to 10 acres	> 10 acres
<b>Lane County Zoning</b>										
Index	Zoning Type	Description								0.0
C	C1	LIMITED COMMERCIAL DISTRICT								
C	C2	NEIGHBORHOOD COMMERCIAL DISTRICT	1.1	3.0			0.1	0.0		
C	CA	RURAL COMMERCIAL DISTRICT	0.1							
C	CT	TOURIST COMMERCIAL DISTRICT								
Open	F2	FOREST LAND DISTRICT		0.2				0.2		
I	M1	LIMITED INDUSTRIAL DISTRICT		3.2						
Open	NE	NATURAL ESTUARY								1.0
Open	NR	NATURAL RESOURCE	0.6							
Open	PR	PARK AND RECREATION	0.2							
LDR	RA	SUBURBAN RESIDENTIAL DISTRICT	87.1	1.5			0.2	4.6	8.1	1.8
M	RA/MH	SUBURBAN RESIDENTIAL / MOBILE HOME DISTRICT	126.7	0.9	4.7		1.2			
C	RC	RURAL COMMERCIAL								
LDR	RR	RURAL RESIDENTIAL DISTRICT	1.9	4.8			0.0			
LDR	RR1	RURAL RESIDENTIAL (1 ACRE MINIMUM)						0.0		
LDR	RR5	RURAL RESIDENTIAL (5 ACRE MINIMUM)								
			919.2	44.6	10.6	10.2	27.1	76.9	24.5	18.4
						984.5				146.8

### Appendix I Florence City and UGB Zoning Assignment Assumptions

City of Florence Zoning			
Zoning	Gen. Class	Expected Use Type	Zoning Description
AD	Emp.	Industrial	AIRPORT DEVELOPMENT
C	Emp.	Commercial	COMMERCIAL
CV	Res.	Residential (low density)	COAST VILLAGE
H	Emp.	Commercial	HIGHWAY DISTRICT
I	Emp.	Industrial	PACIFIC VIEW BUSINESS PARK DISTRICT
IP	Emp.	Industrial	PACIFIC VIEW BUSINESS PARK DISTRICT
LI	Emp.	Industrial	LIMITED INDUSTRIAL
M	Emp.	Industrial	MARINE DISTRICT
MH	Res.	Residential (Mfg. homes)	MOBILE HOME/MANUFACTURED HOME
MSA	Emp.	Commercial	MAIN STREET
MSB	Emp.	Commercial	MAIN STREET/AREA B
NCD	Emp.	Commercial	NORTH COMMERCIAL DISTRICT
OS	Open Space	Open Space/Parks	OPEN SPACE
OTB	Mixed	Office/Service/Res	OLD TOWN DISTRICT
OTC	Mixed	Office/Service/Res	OLD TOWN AREA C
OTDA	Mixed	Office/Service/Res	OLD TOWN DISTRICT/AREA A
POI	Emp.	Office/Service	PROFESSIONAL OFFICE/INSTITUTIONAL
RM	Res.	Residential (medium density)	MULTIPLE FAMILY RESIDENTIAL
RR	Res.	Residential (low density)	RESTRICTED RESIDENTIAL
RS	Res.	Residential (low density)	SINGLE FAMILY RESIDENTIAL
SID	Emp.	Industrial	SERVICE/INDUSTRIAL DISTRICT
WF/M	Emp.	Industrial	WATERFRONT/MARINE

Lane County Zoning		
Index Assumption	Zoning Type	Description
C	C1	LIMITED COMMERCIAL DISTRICT
C	C2	NEIGHBORHOOD COMMERCIAL DISTRICT
C	CA	RURAL COMMERCIAL DISTRICT
C	CT	TOURIST COMMERCIAL DISTRICT
Open	F2	FOREST LAND DISTRICT
I	M1	LIMITED INDUSTRIAL DISTRICT
Open	NE	NATURAL ESTUARY
Open	NR	NATURAL RESOURCE
Open	PR	PARK AND RECREATION
LDR	RA	SUBURBAN RESIDENTIAL DISTRICT
M	RA/MH	SUBURBAN RESIDENTIAL / MOBILE HOME DISTRICT
C	RC	RURAL COMMERCIAL
LDR	RR	RURAL RESIDENTIAL DISTRICT
LDR	RR1	RURAL RESIDENTIAL (1 ACRE MINIMUM)
LDR	RR5	RURAL RESIDENTIAL (5 ACRE MINIMUM)