



Results of the Clatsop County Economic Development Survey

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Executive Summary

Clatsop County contracted with the Community Planning Workshop (CPW) at the University of Oregon to conduct a residential and a business survey about economic development issues in Clatsop County. The goal of these surveys is to get opinions and perspectives from a range of people who live and own or manage businesses in Clatsop County.

The survey was conducted from November to December of 2004. The Executive Summary describes the projects methods and highlights some of the key survey findings.

Methodology

The primary research tools were two surveys, one mailed to businesses in Clatsop County and one mailed to residents of Clatsop County. CPW drew a random sample of 1,200 names for each survey. Of the 1,200 surveys administered to residents, eleven were undeliverable, yielding an effective sample size of 1,189. CPW received 265 valid responses resulting in a 22.3% response rate. Of the 1,200 surveys administered to businesses, 314 were undeliverable, yielding an effective sample size of 886. CPW received 183 valid responses, resulting in a 20.7% response rate.

A potential limitation of any random sample survey is non-response bias. In the case of the surveys CPW conducted for Clatsop County, if one were to assume that the sample was perfectly random and that there was no response bias, then the survey would have a margin of error of $\pm 7\%$ at the 95% confidence level based on the sample size relative to the sample population. This means that if the survey were conducted 100 times, 95 of those times we would expect the results would end up within $\pm 7\%$ of those presented in this report.

Non-response bias is an issue in all surveys, but is particularly important in mailed surveys due to response rates. The Residential survey has a 22% response rate and the Business survey had a 21% response rate. We can use the comparisons of the demographics for survey respondents to evaluate how representative we feel the samples are. While the Residential sample shows some key differences from the sample population, CPW is confident that the survey identifies the range of attitudes and opinions that County residents have regarding economic development. While the survey provides specific data on many local issues, we encourage the County Board of Commissioners to consider the results in light of other information pertinent to developing an effective economic development strategy. In short, the survey results should not be directly interpreted as a policy mandate.

Key Findings

Residential Survey

- Survey respondents exhibited many similarities to all residents of Clatsop County, however, there are some notable differences between the groups. In general, survey respondents are somewhat older, more frequently female, are more likely to own their home, and more frequently have a higher educational attainment.
- About 73% of the residents surveyed responded that the projected population growth is acceptable. Twenty-one percent of those surveyed indicated that the population is growing too quickly, and 6% of the residents surveyed indicated that Clatsop County is growing too slowly.
- The top five characteristics that residents indicated that were most important for establishing a high quality of life were: quality of education system, living wage jobs, affordable housing, variety of health care choices, and environmental quality.
- The services and amenities that survey respondents rated highest were: access to recreation, environmental quality, parks, natural resources and habitat protection, and access to a performing arts center.
- There is a gap between the quality of life characteristics survey respondents thought were important and characteristics that were rated highly in Clatsop County. Respondents rated quality of education system, living wage jobs, and affordable housing as the most important characteristics for a high quality of life. The current quality of living wage jobs and affordable housing were among the lowest rated characteristics.
- About 38% of respondents indicated that Clatsop County is better off now than five years ago. Twenty-four percent of respondents indicated that Clatsop County is about the same today as it was five years ago, while 15% indicated that they are not sure if Clatsop County is better off now. Twenty-two percent of respondents indicated that Clatsop County is not better off now.
- The majority of respondents think that there are not enough opportunities for job training and education. The types of job training and education that the most respondents indicated would be helpful are: trade (such as carpentry or plumbing) training, higher education, and health care training.

- County residents tend to purchase lower-order goods (goods that are needed day-to-day) locally. For example, 91% of respondents indicated they purchase banking services, 72% indicated they purchase clothing and shoes, and 71% indicated they purchase pharmaceuticals locally. A higher percentage of respondents purchase goods or services—services like investment services, travel services, and computers and electronics—that are not readily available in Clatsop County in other markets.

Business Survey

- Most respondents are small businesses, with four or fewer employees and annual revenues of \$500,000 or less. About one-third of the businesses have been in Clatsop County for 30 years or more.
- Less than 10% of survey respondents rated Clatsop County as an excellent place to do business. About 35% of respondents rated the County as a good place to do business and about 45% rated it as a fair place to do business. Slightly more than 10% rated the County as a poor place to do business.
- When asked whether the County is a better place to do business now that it was five years ago, 32% of respondents thought the County is a better place to conduct business, 16% of businesses thought the County is a worse place to do business, and 16% thought that conducting business in the County is both better and worse. Twenty-nine percent of respondents thought that conducting business in the County has not changed in the last five-years.
- Business respondents think that quality of life characteristics, including recreation opportunities, quality of life, environmental quality, and community safety, have positive effects on Clatsop County as a place to do business.
- Business respondents think that regulatory practices, the tax burden, economic issues, and lack of a well-trained labor force have a negative effect on businesses in Clatsop County.
- Thirty-nine percent of respondents thought the County government is somewhat supportive or very supportive to local businesses, 29% thought the government is somewhat unsupportive or very unsupportive to local businesses, and 33% thought the government is neither supportive or unsupportive to local businesses.
- Fifty-three percent of businesses indicate that they plan to expand in the next five years. Eighty percent of these businesses plan to expand in Clatsop County. They expect to hire an average of 9.2 new employees, need an average of 3.2

acres for expansion, and need an average of an additional 3,000 square feet of floor space.

Economic Development Policies for the Residential and Business Surveys

- A large majority of businesses and residents are in favor of economic growth and think that the County should either encourage economic growth or accommodate and manage it. About 47% of respondents thought the County should encourage economic growth and 36% of respondents thought that the County should accommodate and manage economic growth. Relatively few respondents (3%) thought that the County should discourage economic growth.
- Businesses and residents think that economic development should be promoted by a combination of County and city governments and the local chambers of commerce.
- Respondents perceive that there are barriers to economic development in Clatsop County. Businesses perceived regulations and the lack of focus on economic development by the government as significant barriers. Residents perceived transportation, government attitudes, and a negative attitude about growth as barriers to economic development
- Residential respondents are more in favor of economic development policies and strategies that enhance the quality of life and provide better job training. Business respondents are more in favor of economic development policies and strategies that reduce regulation and fees, increase the amount of industrial land that is available, and actively recruit new businesses
- Nearly half of residential respondents think that the County should use financial incentives, such as tax abatements or loans, to attract new businesses. The majority of these respondents support the use of tax breaks, fee waivers, loans, and grants to attract new businesses to the County.

Chapter 1

Introduction

The Clatsop Board of County Commissioners is working to update the County's economic development strategy. Clatsop County last updated the economic development portions of their comprehensive plan in 1983. To accomplish the update, the Board of County Commissioners is using a ten-step process to determine the County's role in economic development. This process includes working with community groups, such as the Clatsop Economic Development Council (CEDC), as well as conducting surveys and focus group meetings. The County's updated economic development strategy will result in goals and actions that are achievable within the current budgetary constraints.

The second step of the Board of County Commissioners' program was to survey residents and business about their attitudes about growth, quality of life, the business climate, and potential economic development policies. The goal of these surveys was to get opinions and perspectives from people that live or manage businesses in Clatsop County. The Community Planning Workshop worked with staff members in the Clatsop County government to develop and implement the surveys of businesses and residents.

Methodology

The primary research tools were two surveys, one mailed to businesses in Clatsop County and one mailed to residents of Clatsop County. CPW drew a random sample of 1,200 names for each survey. Of the 1,200 surveys administered to residents, eleven were undeliverable, yielding an effective sample size of 1,189. CPW received 265 valid responses resulting in a 22.3% response rate. Of the 1,200 surveys administered to businesses, 314 were undeliverable, yielding an effective sample size of 886. CPW received 183 valid responses, resulting in a 20.7% response rate. Appendix A provides a more detailed discussion of the methodology for the Residential survey. Appendix C provides a more detailed discussion of the methodology for the Business survey.

Limitations of this study

A key limitation of any random sample survey is non-response bias. If one were to assume that the sample was perfectly random and that there was no response bias, then the survey would have a margin of error of $\pm 7\%$ at the 95% confidence level based on the sample size relative to the sample population. This means that if the survey were conducted 100 times, 95 of those times we would expect the results would end up within $\pm 7\%$ of those presented in this report.

Non-response bias is an issue in all surveys, but is particularly important in mailed surveys due to response rates. The Residential survey has a 22% response rate and the Business survey had a 21% response rate. We can use the comparisons of the demographics for survey respondents to evaluate how representative we feel the samples are. The demographic comparisons are presented at the beginning of Chapter 3 and Chapter 4.

Organization of this report

The remainder of this report is organized as follows:

- **Chapter 2: Resident Survey Results** presents respondents' demographic data and opinions about quality of life issues.
- **Chapter 3: Business Survey Results** presents respondents' demographic data, opinions about the current business climate, and plans for future business expansions.
- **Chapter 4: Economic Development** presents residential and business respondents' opinions about economic development policies, as well as a comparison of residential and business attitudes.

This report also includes four appendices:

- **Appendix A: Residential Survey Methodology and Survey Instrument** includes a description of the residential survey methodology and the survey instruments.
- **Appendix B: Open-ended Questions from the Residential Survey** is a transcript of the open-ended questions on the residential survey.
- **Appendix C: Business Survey Methodology and Survey Instrument** includes a description of the business survey methodology and the survey instruments.
- **Appendix D: Open-ended Questions from the Business Survey** is a transcript of the open-ended questions on the business survey.

Chapter 2

Resident Survey Results

In this chapter, we describe the results of the resident survey that CPW conducted in November and December 2004. The chapter begins with a discussion of the characteristics of survey respondents. Where appropriate, we compare the demographic characteristics of the survey respondents to United States Census data for Clatsop County. The chapter then presents the results of questions about growth and quality of life issues. Finally, at the end of the survey, respondents were given the opportunity to provide additional comments. A transcript of the comments is provided in Appendix B.

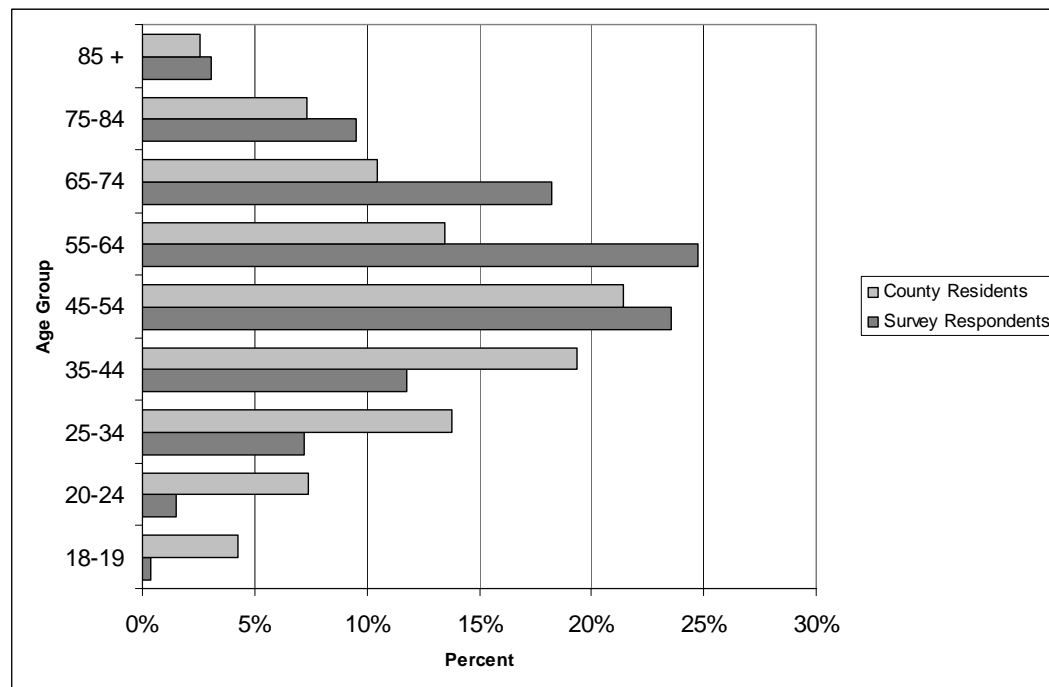
Characteristics of Survey Respondents

In any analysis of survey results based on a population sample, it is important to identify and describe the demographic characteristics of the sample and compare them to the characteristics of the population as a whole. Significant differences between the sample and entire population could indicate areas of potential bias of the survey results. We compared the demographics of the survey respondents to U.S. Census data from 2000 for Clatsop County.¹

Figure 2-1 shows the age of the residential survey respondents compared to the age of Clatsop County residents. Survey respondents were generally older than all residents of Clatsop County. Respondents between the ages of 18 and 44 were under represented in the survey responses. Residents 45 years and older were over represented by the survey responses, especially for respondents aged 55 to 74. This may results from the fact that surveys were sent to registered voters and younger people, especially those less than 24 years old, are less likely to be registered voters than older people.

¹ We recognize that the Census data were more than four years old at the time the survey was conducted. However, the Census data provide the best baseline data source for comparison of the survey responses.

Figure 2-1. Age of Survey Respondents



Source: Clatsop County Resident Survey, 2004, U.S. Census, 2000

Table 2-1 shows the gender distribution of the survey respondents. Females were over-represented in the survey responses, with 58% of survey respondents being female, compared with 51% of Clatsop County's general population.

Table 2-1. Gender of Respondents

Gender	Survey Respondents	Clatsop County
Male	42%	49%
Female	58%	51%

Source: Clatsop County Resident Survey, 2004, U.S. Census, 2000

Most survey respondents lived in two-person households, as shown in Table 2-2. Twenty-percent of respondents indicated that children live in the household, with an average of approximately two children per household. The average household size of survey respondents was 2.29 persons, which was slightly lower than the County-wide household size of 2.35.² Two-person households were over represented in the survey and one-person households were under represented in the survey responses.

² U.S. Census, 2000

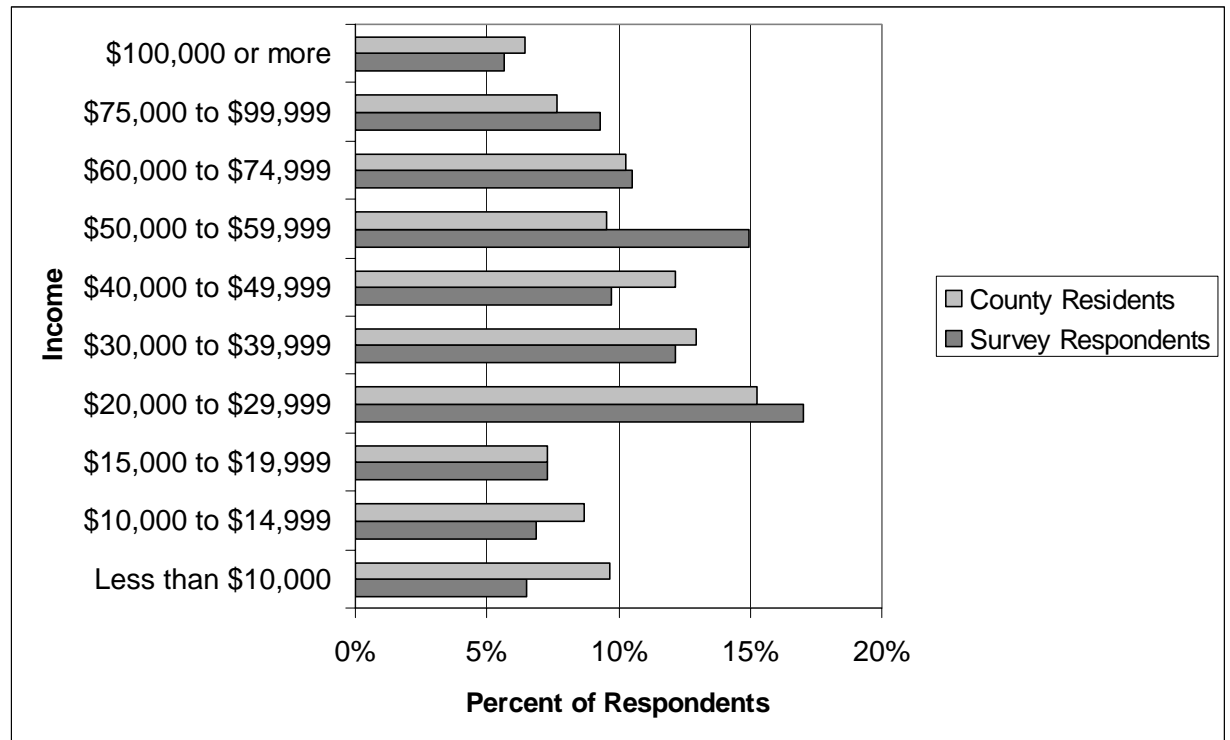
Table 2-2. Household Size

Household Size	Survey Respondents		Clatsop County	
	Number	Percent	Number	Percent
1-person	51	20%	4355	30%
2-person	139	54%	5482	37%
3-person	34	13%	2081	14%
4-person	20	8%	1672	11%
5-person	9	3%	728	5%
6-persons or more	6	2%	385	3%

Source: Clatsop County Resident Survey, 2004, U.S. Census, 2000

Figure 2-2 shows the household income for survey respondents compared with all County Residents.³ Household income for survey respondents tended to be slightly higher than household income for all County residents. Households making between \$50,000 and \$59,999 annually were over represented and households with annual income less than \$15,000 were under represented.

Figure 2-2. Household Income



Source: Clatsop County Resident Survey, 2004, U.S. Census, 2000

³ The household income data for the County residents is taken from the 1999 income information in the 2000 U.S. Census. It is probable that household income for Clatsop County residents has increased since 1999.

Table 2-3 shows housing tenure for survey respondents and all Clatsop County residents. Seventy-nine percent of survey respondents owned their home, compared with 64% of all County residents. Renters were under represented in the survey respondents, with 21% of respondents renters, compared with 36% of the County's population. This suggests that the survey sample over represented homeowners.

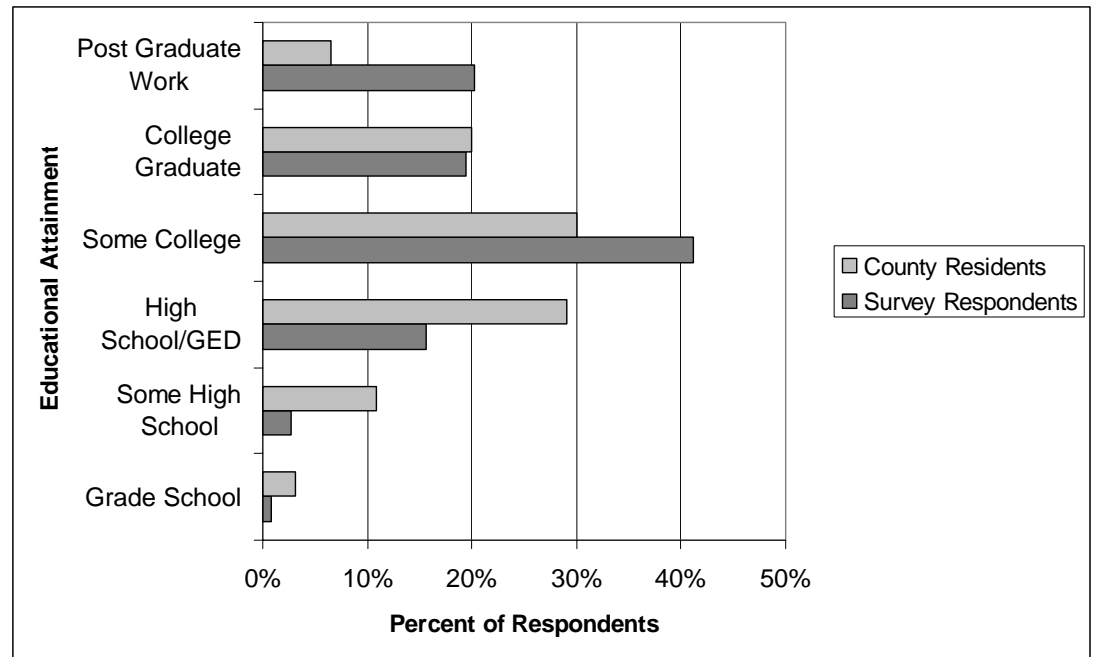
Table 2-3. Housing Tenure of Survey Respondents

	Survey Respondents	Clatsop County
Rent	21%	36%
Own	79%	64%

Source: Clatsop County Resident Survey, 2004, U.S. Census, 2000

Figure 2-3 shows the educational attainment for survey respondents compared to all residents of the County.⁴ Survey respondents had some college or post graduate work more frequently than the County's population. The survey respondents under represent residents with educational attainment of high school/GED or less.

Figure 2-3. Educational Attainment



Source: Clatsop County Resident Survey, 2004, U.S. Census, 2000

⁴ The survey did not differentiate between a two-year Associate's degree (AA) and a four-year Bachelor's degree (BA/BS). The U.S. Census does distinguish between the two types of degrees. We felt it likely that people with an AA degree would consider themselves a college graduate, so we combined the AA and BA/BS degree data in the Census into the category "college graduate."

Table 2-4 shows the part of Clatsop County that best describes the location of survey respondents' home. Forty-eight percent of survey respondents lived in the Astoria and Warrenton area. Twenty-one percent lived in the Seaside and Gearhart area and 15% lived in unincorporated areas of the County.

Table 2-4. Respondents' Location of Residence

Location	Number	Percent
Astoria	85	32%
Warrenton	42	16%
Unincorporated County	40	15%
Seaside	34	13%
Gearhart	21	8%
East County	18	7%
Cannon Beach	15	6%
Hammond	7	3%
Arch Cape	2	1%

Source: Clatsop County Resident Survey, 2004

Quality of Life

Quality of life is comprised of all the elements that make a community a good place to live, such as high quality education, availability of family wage jobs, access to recreation and cultural amenities, affordable housing, good environmental quality, as well as other elements. CPW asked respondents questions about the County's growth rate, the importance of specific elements of quality of life, the quality of the elements of quality of life in the County, and the availability of job training and education.

The survey asked residents their opinion about the State of Oregon's projection that population will grow by 0.8% per year in Clatsop County from now until 2020. Table 2-5 shows that 73% of the residents surveyed responded that the projected population growth is acceptable. Twenty-one percent of those surveyed indicated that the population is growing too quickly, and 6% of the residents surveyed indicated that Clatsop County is growing too slowly.

Table 2-5. Respondents' opinion about the growth rate in Clatsop County

Response	Number	Percent
Acceptable	175	73%
Growing too quickly	51	21%
Growing too slowly	14	6%

Source: Clatsop County Resident Survey, 2004

Table 2-6 shows residents' opinion about the importance of various characteristics for establishing a high quality of life, ranked by the mean score for each characteristic (where 1=very positive and 5=very negative).⁵ The top five characteristics that residents indicated that were most important for establishing a high quality of life were: quality of education system, living wage jobs, affordable housing, variety of health care choices, and environmental quality.⁶ The characteristics that residents indicated were least important to a high quality of life were: access to performing arts center, variety of shopping opportunities, and transportation options. Although respondents indicated that these characteristics were "very important" or "important" less frequently, each of these characteristics is ranked as "very important" or "important" by more than 50% of respondents.

Table 2-6. Respondents' opinion about the importance of selected quality of life characteristics

Characteristic	Percent of Respondents						Mean
	Very Important	Important	Neutral	Unimportant	Very Unimportant	Not Sure	
Quality of education system	71%	25%	3%	1%	0%	0%	1.34
Living wage jobs	69%	28%	2%	1%	0%	0%	1.36
Affordable Housing	64%	30%	5%	2%	0%	0%	1.44
Variety of health care choices	50%	43%	6%	0%	0%	0%	1.58
Environmental quality	51%	37%	10%	2%	1%	1%	1.64
Access to higher education	51%	36%	9%	3%	0%	0%	1.65
Diverse economic base	38%	45%	13%	2%	1%	1%	1.81
Variety of housing choices	29%	56%	13%	1%	0%	1%	1.85
Access to recreation	31%	51%	14%	3%	0%	0%	1.89
Natural resources and habitat protection	38%	36%	20%	4%	1%	1%	1.92
Parks	24%	53%	18%	3%	1%	0%	2.03
Transportation options	21%	52%	22%	4%	2%	0%	2.15
Variety of shopping opportunities	16%	48%	27%	5%	3%	0%	2.30
Access to a performing arts center	12%	39%	32%	12%	5%	0%	2.59
Other	72%	20%	4%	0%	0%	4%	1.29

Source: Clatsop County Resident Survey, 2004

Table 2-7 shows how survey respondents rate the current quality of services and amenities in Clatsop County, ranked by the mean score for each characteristic (where 1=very positive and 5=very negative).⁷ None of the services and amenities overwhelmingly received a "very good" or "very poor" rating from survey respondents. The results are spread out on the quality continuum and there are many responses that rate the quality of services and amenities as "neutral."

⁵ The value for the answer "not sure" is not included in the calculation of the characteristics' mean.

⁶ We did not consider the category "other" in the top five responses because only 25 respondents listed other characteristics and ranked them.

⁷ The value for the answer "not sure" is not included in the calculation of the characteristics' mean.

The services and amenities that survey respondents rated highest were: access to recreation, environmental quality, parks, natural resources and habitat protection, and access to a performing arts center. The services and amenities that survey respondents rated lowest were: living wage jobs, diverse economic base, affordable housing, and the variety of health care choices.

Table 2-7. Respondents' opinion about current services and amenities

Characteristic	Very Good		Neutral	Very Poor		Mean
	Good	Good		Poor	Poor	
Access to recreation	19%	53%	22%	5%	1%	2.16
Environmental quality	13%	54%	27%	5%	1%	2.28
Parks	13%	52%	26%	7%	1%	2.32
Natural resources and habitat protection	12%	53%	27%	6%	2%	2.33
Access to a performing arts center	5%	38%	44%	11%	2%	2.67
quality education system	2%	39%	40%	16%	2%	2.76
Access to higher education	4%	39%	36%	19%	3%	2.79
Variety of shopping opportunities	2%	42%	30%	24%	3%	2.83
Transportation options	3%	36%	40%	17%	4%	2.83
Variety of housing choices	2%	36%	39%	21%	3%	2.87
Variety of health care choices	3%	35%	28%	29%	6%	2.99
Affordable Housing	2%	31%	31%	34%	3%	3.05
Other	23%	15%	23%	0%	38%	3.15
Diverse economic base	1%	15%	35%	46%	4%	3.37
Living wage jobs	1%	7%	23%	57%	13%	3.75

Source: Clatsop County Resident Survey, 2004

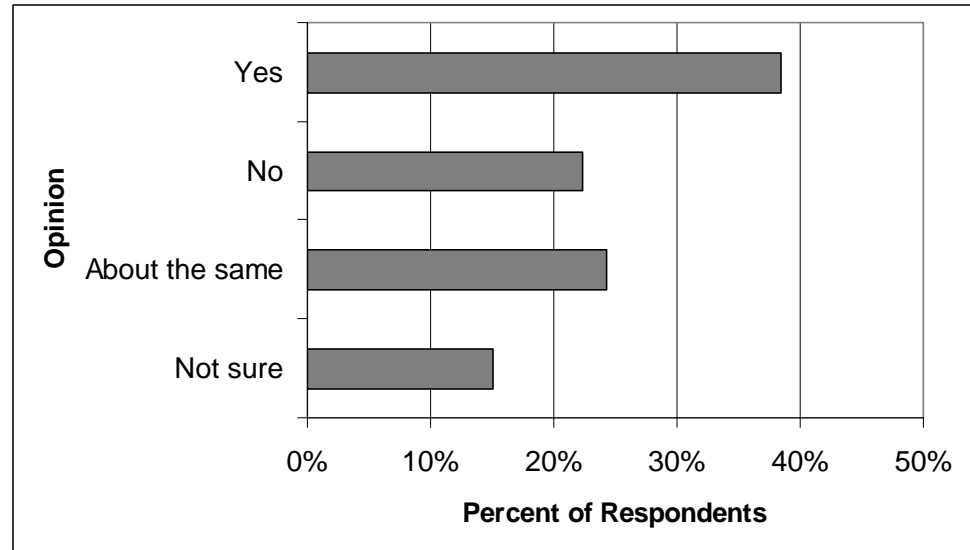
The results in Table 2-6 and Table 2-7 show that there is a gap between the quality of life characteristics survey respondents thought were important and characteristics that were rated highly in Clatsop County. Respondents rated quality of education system, living wage jobs, and affordable housing as the most important characteristics for a high quality of life. Among these characteristics, the quality of education is best-rated, with 42% of respondents rating it "very good" or "good", 40% rating it as "neutral", and 18% rating it as "poor" or "very poor." The current quality of living wage jobs and affordable housing were among the lowest rated characteristics.

Respondents gave the current quality of access to recreation, environmental quality, and parks the highest ratings. But only environmental quality was listed in their top five most important characteristics for quality of life, shown in Table 2-6.

Figure 2-4 shows respondents' perception of whether Clatsop County is better off now compared to five years ago. About 38% of respondents indicated that Clatsop County is better off now than five years ago. Twenty-four percent of respondents indicated that Clatsop County is

about the same today as it was five years ago, while 15% indicated that they are not sure if Clatsop County is better of now. Twenty-two percent of respondents indicated that Clatsop County is not better off now.

Figure 2-4. Respondents' opinion about whether Clatsop County is better off now than it was five years ago



Source: Clatsop County Resident Survey, 2004

Job Training and Educational Opportunities

The survey asked residents' opinion about whether there are sufficient opportunities for job training and higher education in Clatsop County. Sixty-one percent of respondents indicated that there are not sufficient job training and higher education opportunities in Clatsop County and 39% indicated there are sufficient job training and higher education opportunities in the County.

As a follow up question, respondents who answered that there are not enough opportunities for job training and higher education in Clatsop County were asked what type of training or education would be most helpful. Table 2-8 shows that residents responded that trade (such as carpentry or plumbing) training, higher education, and health care training would be most helpful. The three types of education that received the fewest responses were: restaurant and food services, agricultural education, and management.

Table 2-8. Residents' opinion about the types of job training that would be helpful

Characteristic	Number	Percent
Trade (such as carpentry or plumbing)	90	60%
Higher education	87	58%
Health care	77	51%
High-tech	71	47%
Adult literacy	61	40%
Maintenance and repair	60	40%
Business and finance	48	32%
English language	48	32%
Professional	43	28%
Forest management	40	26%
Other technical	39	26%
Office and administrative support	37	25%
Spanish language	37	25%
Restaurant or food services	35	23%
Agricultural education	31	21%
Management	26	17%
Other (please specify)	8	5%

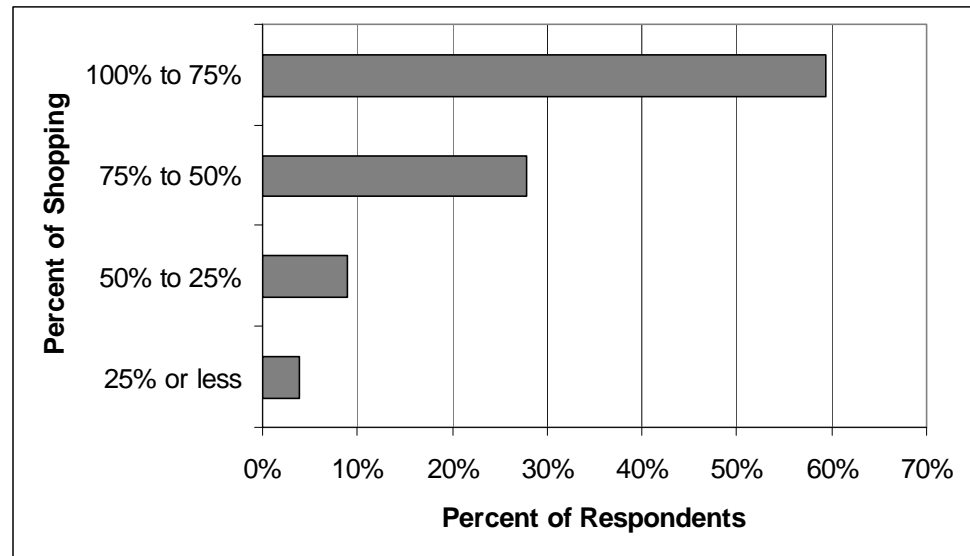
Source: Clatsop County Resident Survey, 2004

Shopping

Figure 2-5 shows the percentage of respondents' shopping that occurs in Clatsop County. The majority of respondents do 50% or more of their shopping in Clatsop County. More than half of those surveyed indicated that 75% to 100% of their shopping is occurs in the county (58%).

Twenty-seven percent of those surveyed indicated that 50% to 75% of their shopping occurs within the county. Nine percent of respondents purchase 25% to 50% of their goods and services in the county and 4% do 25% or less of their shopping in Clatsop County.

Figure 2-5. Percentage of shopping that respondents do within Clatsop County



Source: Clatsop County Resident Survey, 2004

As a follow-up question, respondents were asked which products and services they purchase when they locally available. Table 2-9 shows that respondents frequently purchased the following products and services when they were available locally: banking services, medical services, dental services, clothing and shoes, auto parts and accessories, and pharmaceuticals. The products and services that respondents indicated they would purchase locally least frequently were investment services, travel services, and computers and electronics.

Table 2-9. Types of products and services that respondents purchase in Clatsop County

Product or Service	Number	Percent
Banking services	240	91%
Medical services	212	80%
Dental services	208	78%
Clothing and shoes	191	72%
Auto parts and accessories	189	71%
Pharmaceuticals	187	71%
Insurance services	168	63%
Furniture and appliances	148	56%
Recreation services	140	53%
Office supplies	113	43%
Legal services	110	42%
Travel services	77	29%
Computers and electronics	73	28%
Investment services	59	22%

Source: Clatsop County Resident Survey, 2004

Table 2-10 shows respondents' reasons for shopping outside of Clatsop County. The majority of respondents indicated that the reasons they shop outside of the County are selection and price. Respondents rarely indicated that parking availability and distance from work are reasons for shopping outside of Clatsop County.

Table 2-10. Respondents' reasons for shopping outside of Clatsop County

Reasons	Number	Percent
Selection	188	71%
Price	175	66%
Product Quality	70	26%
Close to other shopping	62	23%
Hours of Operation	24	9%
Customer Service	23	9%
Parking Availability	13	5%
Close to work	2	1%

Source: Clatsop County Resident Survey, 2004

Key Findings

- Survey respondents exhibited many similarities to all residents of Clatsop County, however, there are some notable differences between the groups. In general, survey respondents are somewhat older, more frequently female, are more likely to own their home, and more frequently have a higher educational attainment.
- About 73% of the residents surveyed responded that the projected population growth is acceptable. Twenty-one percent of those surveyed indicated that the population is growing too quickly, and 6% of the residents surveyed indicated that Clatsop County is growing too slowly.
- The top five characteristics that residents indicated that were most important for establishing a high quality of life were: quality of education system, living wage jobs, affordable housing, variety of health care choices, and environmental quality.
- The services and amenities that survey respondents rated highest were: access to recreation, environmental quality, parks, natural resources and habitat protection, and access to a performing arts center.
- There is a gap between the quality of life characteristics survey respondents thought were important and characteristics that were rated highly in Clatsop County. Respondents rated quality of education system, living wage jobs, and affordable housing as the most important

characteristics for a high quality of life. The current quality of living wage jobs and affordable housing were among the lowest rated characteristics.

- About 38% of respondents indicated that Clatsop County is better off now than five years ago. Twenty-four percent of respondents indicated that Clatsop County is about the same today as it was five years ago, while 15% indicated that they are not sure if Clatsop County is better of now. Twenty-two percent of respondents indicated that Clatsop County is not better off now.
- The majority of respondents think that there are not enough opportunities for job training and education. The types of job training and education that the most respondents indicated would be helpful are: trade (such as carpentry or plumbing) training, higher education, and health care training.
- County residents tend to purchase lower-order goods (goods that are needed day-to-day) locally. For example, 91% of respondents indicated they purchase banking services, 72% indicated they purchase clothing and shoes, and 71% indicated they purchase pharmaceuticals locally. A higher percentage of respondents purchase goods or services—services like investment services, travel services, and computers and electronics—that are not readily available in Clatsop County in other markets.

Chapter 3

Business Survey Responses

In this chapter, we present the results of the Business survey. We describe the characteristics of business respondents, their perception of the business climate in Clatsop County, and their plans for business expansion in next five years.

Characteristics of Responding Businesses

The survey sample for businesses was stratified by industry to ensure representation of all industries in Clatsop County. Survey respondents were asked to indicate the type of industry or profession that most accurately describes their business. This information is shown in Table 3-1, along with countywide businesses based on Employment Security 202 (ES-202) data.⁸ It is probable that some respondents misclassified their business. The large percentage of businesses that specified "other" supports this conclusion. In addition, some respondents chose multiple industries, which explains why the total number of responses is higher than the number of survey responses.

Table 3-1 shows that 15% of respondents indicated that their business is focused on retail trade. Twelve percent of businesses indicated that their industry is agriculture, forestry, and fishing. Eleven percent indicated that their industry is construction. Few or no businesses indicated that they are involved with wood products manufacturing or high-tech. The results show that the survey sample represents a range of industries in Clatsop County but over-represents some industries and under-represents others. The areas of greatest discrepancy are in agriculture, forestry, and fishing, as well as other services.

⁸ The Employment Security (ES) 202 data is a confidential database on individual employers managed by the Oregon Employment Department. The ES-202 database only includes employers that have "covered" employees—employees covered by unemployment insurance. It does not include sole proprietors, farm workers, and others that are self-employed.

Table 3-1. Type of Industry for survey respondents and all businesses countywide

Industry	Survey		Countywide	
	Number	Percent	Number	Percent
Retail Trade	35	15%	284	18%
Other	33	15%	90	6%
Agriculture, Forestry, Fishing	26	12%	67	4%
Construction	24	11%	175	11%
Business Services	18	8%	128	8%
Eating/Drinking Establishment	18	8%	177	11%
Health Services	13	6%	125	8%
Lodging	11	5%	78	5%
Finance, Insurance, Real Estate	9	4%	107	7%
Other Manufacturing	8	4%	37	2%
Food Processing	7	3%	22	1%
Other Services	7	3%	150	9%
Wholesale Trade	6	3%	36	2%
Education or Training	5	2%	30	2%
Transportation, Communication, Utilities	5	2%	86	5%
Wood Products Manufacturing	1	0%	5	0%
High-tech	0	0%	0	0%
Total	226		1,597	

Source: Clatsop County Resident Survey, 2004

Ninety-three percent of the respondents indicated that their business is based in Clatsop County. Table 3-2 shows the zip code of the respondents and the zip code for businesses countywide based on ES-202 data. Zip codes in Clatsop County are large and tend to cover both urban and rural areas. As a result, it is not possible to determine the exact location of respondents based on their zip code. Fifty-two percent of respondents were located in 97103, which includes Astoria. Twenty-eight percent of respondents were located in 97138, which includes Seaside and Gearhart and 15% were located in 97146, which includes Warrenton⁹. Survey respondents from 97103 were over-represented and those from 97110 were under-represented.

⁹ One respondent from outside the County was included in the survey. It is possible that the business recently relocated.

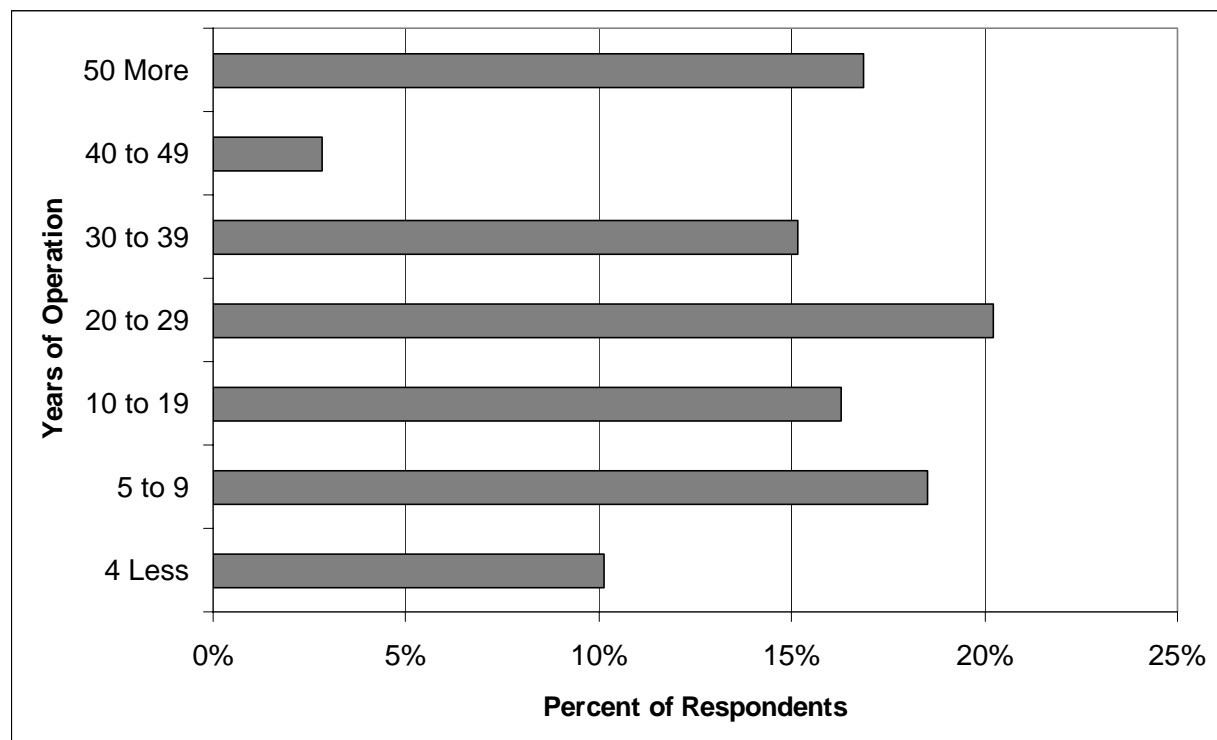
Table 3-2. Number of respondents and number of businesses countywide by zip code

Zip Code	Survey		Countywide	
	Number	Percent	Number	Percent
97103	94	52%	646	40%
97110	3	2%	147	9%
97121	2	1%	21	1%
97136	1	1%	0	0%
97138	51	28%	498	31%
97145	2	1%	7	0%
97146	27	15%	201	13%
Zip code outside the County	1	1%	67	4%

Source: Clatsop County Resident Survey, 2004

Figure 3-1 shows the length of time that respondents' business have operated in Clatsop County. Twenty-nine percent of businesses have been operating in Clatsop County for nine or fewer years. More than one-third of businesses have been operating in Clatsop County for 30 or more years, with 17% operating in the County for 50 or more years.

Figure 3-1. Length of time respondents' business have operated in Clatsop County



Source: Clatsop County Resident Survey, 2004

Table 3-3 shows the number of employees, both full-time and part-time, reported by survey respondents and countywide based on ES-202 data. Forty-two percent of survey respondents had two to four employees.

Eight percent of businesses had 30 or more employees. Businesses with 0 to 1 employees were under-represented in the survey but businesses with 2 to 4 employees were over-represented in the survey. Sixty percent of survey respondents had 4 or fewer employees and 57% of businesses countywide had 4 or fewer employees. Although there is variation between the number of employees for survey respondents and businesses county-wide, survey respondents were generally representative of businesses across the county.

Table 3-3. Total employees reported by survey respondents (full-time and part-time)

Number of Employees	Survey		Countywide	
	Number	Percent	Number	Percent
0 to 1	52	18%	485	30%
2 to 4	123	42%	427	27%
5 to 9	41	14%	321	20%
10 to 19	31	11%	199	12%
20 to 29	20	7%	76	5%
30 to 39	6	2%	28	2%
40 to 49	8	3%	17	1%
50 or more	10	3%	44	3%

Source: Clatsop County Resident Survey, 2004

Table 3-4 shows the number of full time employees for survey respondents. Forty percent of respondents had 2 to 4 full-time employees and 67% had 4 or fewer full-time employees.

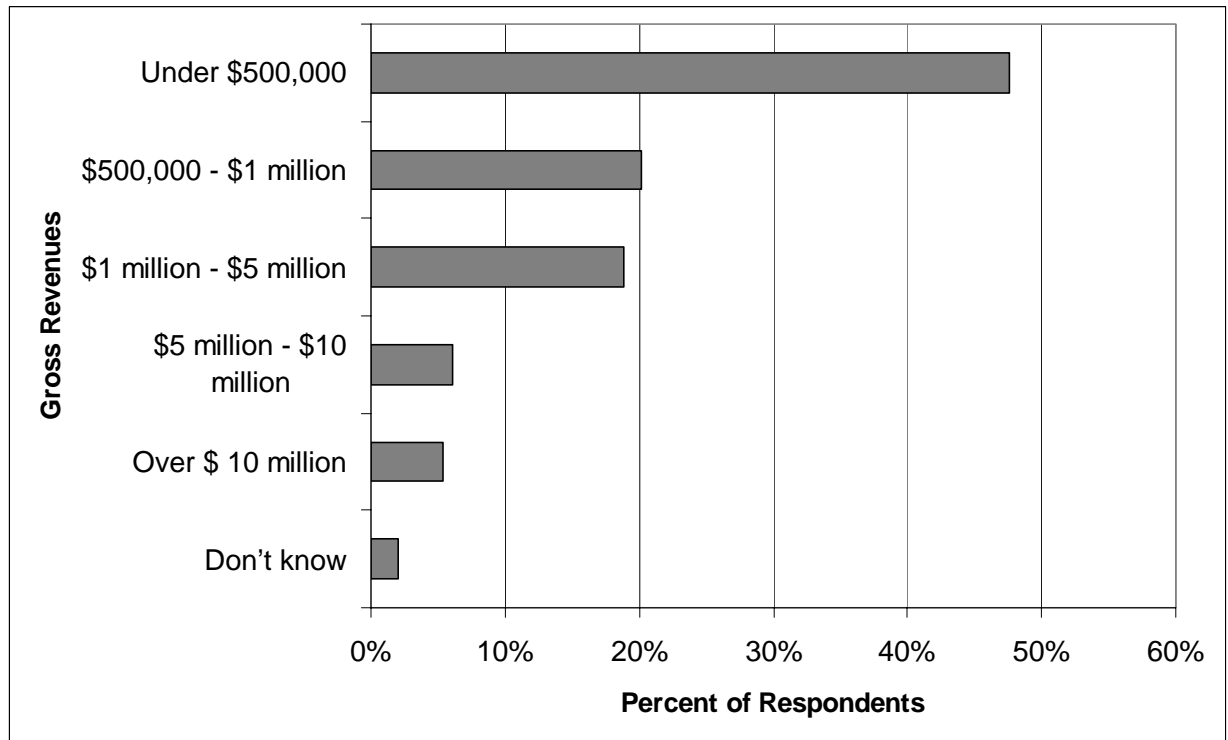
Table 3-4. Full-time employees reported by survey respondents

Number of Employees	Number	Percent
0 to 1	27	17%
2 to 4	65	40%
5 to 9	25	15%
10 to 19	21	13%
20 to 29	9	6%
30 to 39	5	3%
40 to 49	4	2%
50 or more	7	4%

Source: Clatsop County Resident Survey, 2004

Figure 3-2 shows the gross revenues for the most recently completed fiscal year for survey respondents. Slightly less than half of respondents had gross revenues of less than \$500,000. Twenty percent of respondents indicated that they had gross revenues of \$500,000 to \$1 million and 19% of respondents had gross revenues to \$1 million to \$5 million. Eleven percent of respondents had gross revenues greater than \$5 million.

Figure 3-2. Gross revenues for survey respondents



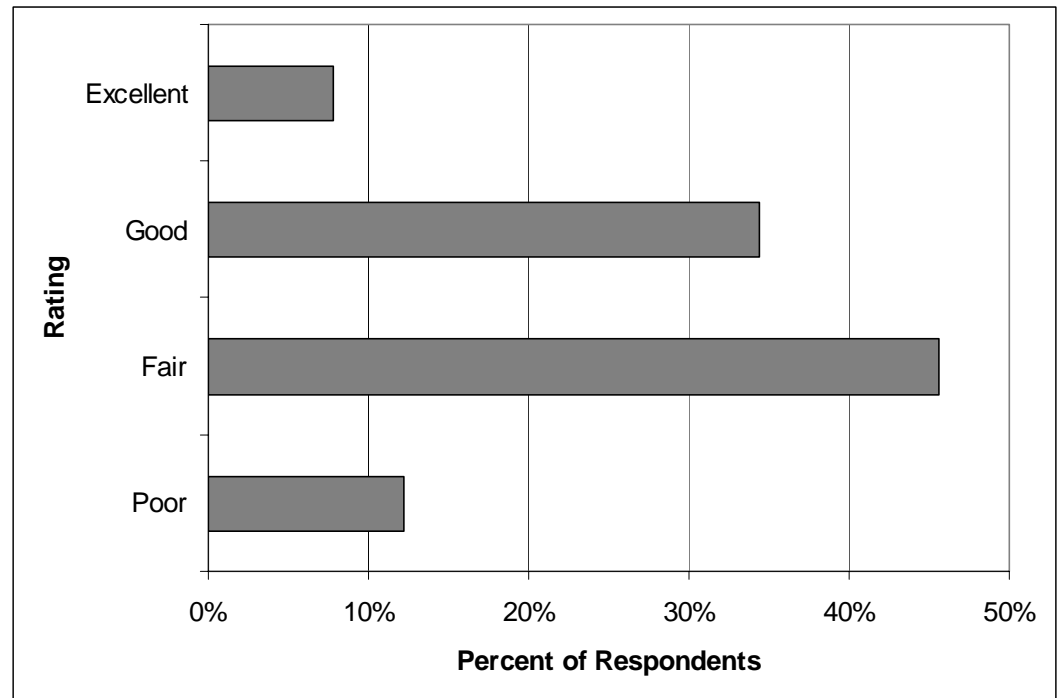
Source: Clatsop County Resident Survey, 2004

Business Climate

This section presents the results of the sections of the survey that address the business climate in Clatsop County. The perceptions of the business climate are presented first, followed by perceptions of the Clatsop County government's support for business.

Figure 3-3 shows survey respondents' rating of Clatsop County as a place to do business at this time. Less than 10% of survey respondents rated Clatsop County as an excellent place to do business. About 35% of respondents rated the County as a good place to do business and about 45% rated it as a fair place to do business. Slightly more than 10% rated the County as a poor place to do business.

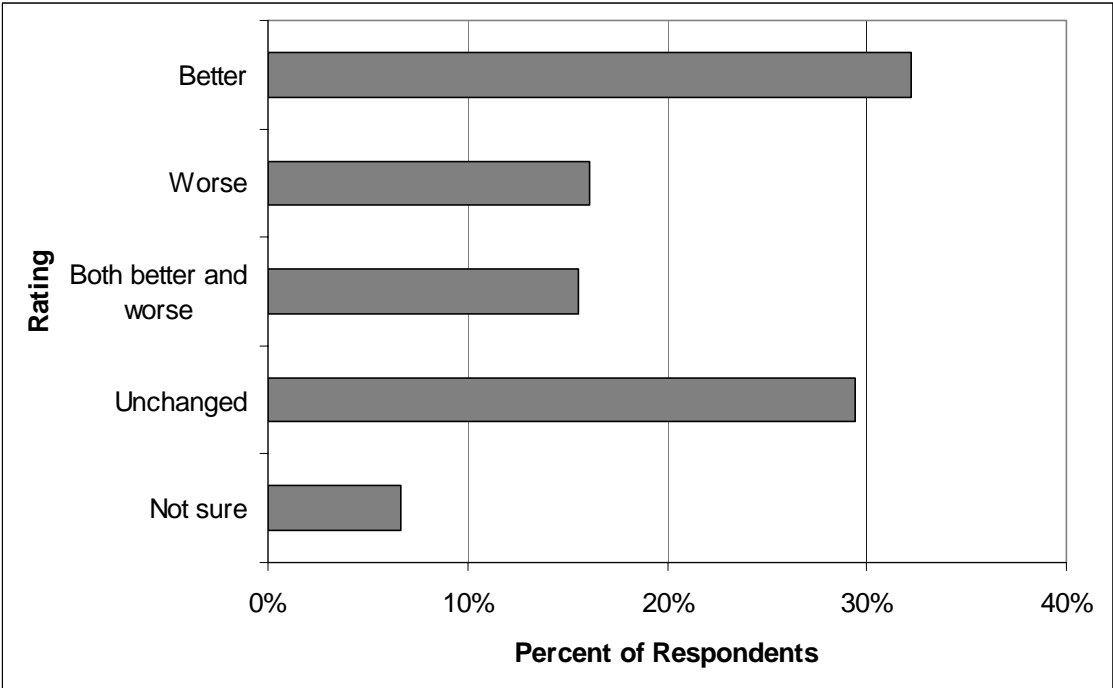
Figure 3-3. Survey respondents' rating of Clatsop County as a place to do business



Source: Clatsop County Resident Survey, 2004

Survey respondents were asked how Clatsop County has changed as a place to conduct business compared with five-years ago. Figure 3-4 shows that 32% of respondents thought the County is a better place to conduct business, 16% of businesses thought the County is a worse place to do business, and 16% thought that conducting business in the County is both better and worse. Twenty-nine percent of respondents thought that conducting business in the County has not changed in the last five-years and 7% were not sure if conducting business has changed in the last five-years.

Figure 3-4. Survey respondents' rating of the change in Clatsop County as a place to do business over the past five-years



Source: Clatsop County Resident Survey, 2004

Survey respondents were asked whether Clatsop County is economically better off than it was five-years ago. Table 3-5 shows that 36% of respondents thought the County is better off, 29% thought that the County is not better off, and 27% thought the County's economy is about the same as it was five-years ago.

Table 3-5. Survey respondents' perception of whether Clatsop County is economically better off than five-years ago

Rating	Number	Percent
Yes	65	36%
No	52	29%
Same	48	27%
Not sure	14	8%

Source: Clatsop County Resident Survey, 2004

The survey asked respondents for reasons that the County is better off than it was five-years ago. Sixty-one respondents provided written comments. The most common themes of the comments were: an increase in tourism, positive types of growth, the economy has been good, and that there has been an increase in public investment. Appendix D has a transcript of the full written comments, which are presented under question 3.

The survey also asked respondents for reasons that the County is worse off than it was five-years ago. Forty-eight respondents provided written

comments. The most common themes of the comments are: the lack of well-paying job, too much government regulation, and a poor economy. Appendix D has a transcript of the full written comments, which are presented under question 3.

Table 3-6 shows 36 characteristics that contribute to perceptions of business climate and shows respondents' opinions of how they affect Clatsop County on a scale of "very positive" to "very negative". Table 3-6 shows the characteristics ranked by the mean score (where 1=very positive and 5=very negative).¹⁰ Quality of life characteristics, including recreation opportunities, quality of life, environmental quality, and community safety, ranked highest. The lowest ranking characteristics were regulatory and economic issues. Community attitudes has the most polarized responses, with about 43% of respondents ranking it as somewhat or very positive and about 40% ranking it as somewhat or very negative.

¹⁰ The value for the answer "not sure" is not included in the calculation of the characteristics' mean.

Table 3-6. Characteristics that affect Clatsop County as a place to conduct business

Characteristic	Effect (Percent of Respondents)						Mean
	Very positive	Somewhat positive	Neutral	Somewhat negative	Very negative	Not sure	
Recreation opportunities	50%	33%	11%	5%	1%	0%	1.74
Quality of life	41%	45%	9%	5%	1%	0%	1.79
Environmental quality	35%	42%	15%	5%	2%	1%	1.94
Community safety	15%	44%	31%	8%	2%	1%	2.37
Economic growth potential	17%	40%	12%	24%	7%	1%	2.64
Availability of capital	5%	24%	37%	20%	5%	10%	2.65
Medical facilities	10%	34%	28%	20%	6%	1%	2.74
Population density	6%	26%	48%	14%	3%	2%	2.74
Vital downtown	6%	39%	30%	18%	7%	1%	2.81
Access to markets and customers	6%	31%	32%	25%	4%	2%	2.86
Shopping facilities	7%	34%	29%	22%	7%	0%	2.87
Sustainability	1%	24%	41%	23%	5%	6%	2.88
Competitive pressure from other businesses	2%	21%	55%	16%	3%	2%	2.91
Cost of living	6%	29%	33%	26%	5%	1%	2.93
Public education system	6%	33%	29%	21%	10%	1%	2.94
Availability of raw materials	1%	19%	33%	29%	9%	9%	2.98
Community attitudes	5%	38%	18%	28%	12%	0%	3.04
Growth management policies	1%	15%	39%	20%	16%	10%	3.05
Affordable housing	7%	24%	26%	34%	7%	1%	3.07
Workforce availability	4%	27%	19%	34%	14%	2%	3.21
Cost of doing business	2%	18%	34%	36%	7%	2%	3.22
Transportation system	4%	23%	30%	30%	12%	1%	3.22
Availability of land	5%	25%	18%	34%	16%	2%	3.23
Traffic Congestion	7%	20%	26%	27%	18%	1%	3.26
Utilities cost	1%	18%	48%	20%	13%	1%	3.26
Infrastructure	1%	9%	35%	35%	13%	7%	3.29
Availability of technology	1%	13%	30%	39%	12%	5%	3.35
Parking	9%	14%	23%	28%	25%	2%	3.41
Local tax policies	1%	7%	44%	29%	16%	3%	3.43
Workforce quality	1%	20%	20%	42%	17%	1%	3.52
Permitting requirements	0%	8%	28%	28%	28%	8%	3.53
Local government regulations	1%	8%	37%	30%	21%	3%	3.54
State and Federal tax policies	0%	3%	32%	31%	26%	8%	3.55
Diverse economic base	1%	10%	26%	41%	20%	2%	3.62
State and Federal regulations	0%	1%	30%	34%	28%	7%	3.67
State's fiscal situation	0%	1%	20%	42%	32%	6%	3.87
Other (specify)	0%	0%	0%	20%	80%	0%	4.80

Source: Clatsop County Resident Survey, 2004

Survey respondents were asked to list the top three strengths and weaknesses of doing business in Clatsop County, using the list of characteristics in Table 3-6. Table 3-7 shows the top ten strengths and weaknesses. The top three strengths were quality of life characteristics, including quality of life, recreational opportunities, and environmental quality. The top weaknesses were local government regulations, permitting requirements, and workforce quality. Some respondents did

not use the categories in Table 3-6 and their responses were categorized as "other." Appendix D has a complete transcript of the responses, listed under question 5.

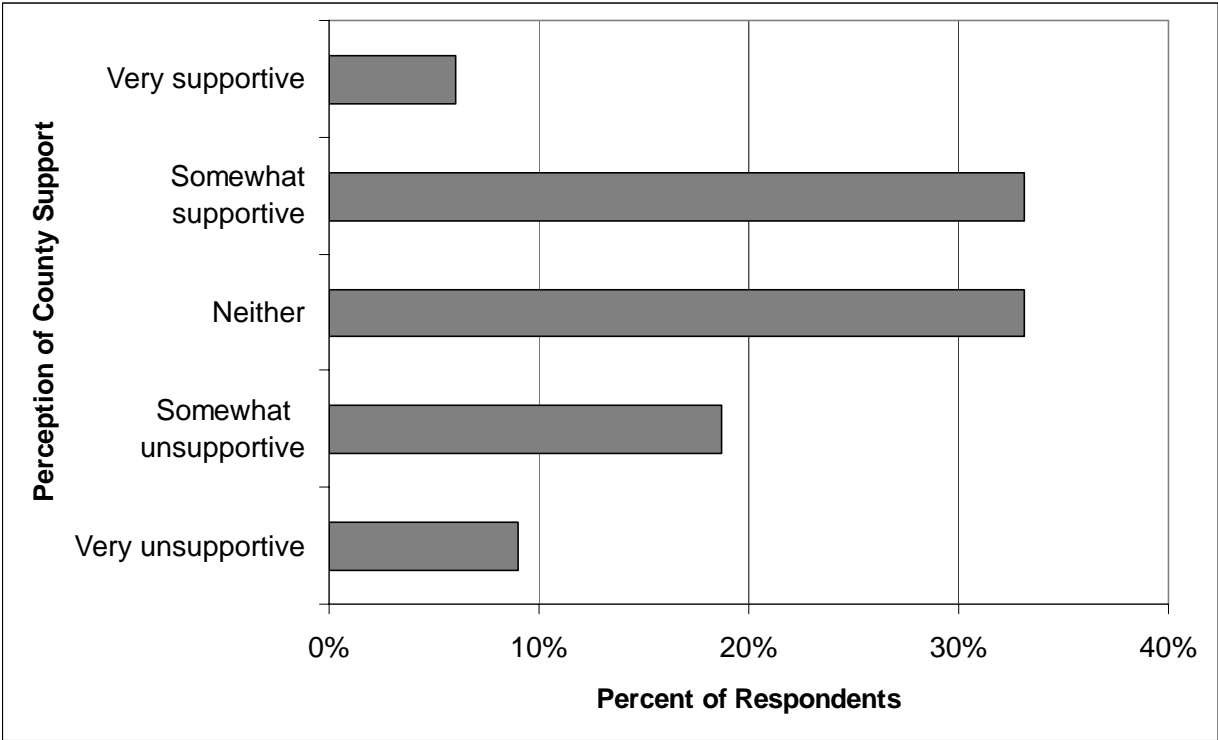
Table 3-7. Top 10 strengths and weaknesses of Clatsop County as a place to conduct business

	Characteristic	Number	Percent
Strengths			
1	Quality of life	90	22%
2	Recreation opportunities	48	11%
3	Environmental quality	46	11%
4	Other (specify)	37	9%
5	Economic growth potential	32	8%
6	Community safety	19	5%
7	Community attitudes	17	4%
8	Public education system	12	3%
9	Workforce availability	11	3%
10	Affordable housing	9	2%
Weaknesses			
1	Other	56	13%
2	Local government regulations	34	8%
3	Permitting requirements	26	6%
4	Workforce quality	22	5%
5	Parking	20	5%
6	Traffic Congestion	19	4%
7	Workforce availability	19	4%
8	Local tax policies	18	4%
9	Diverse economic base	17	4%
10	State's fiscal situation	17	4%

Source: Clatsop County Resident Survey, 2004

Figure 3-5 shows survey respondents' perception of how supportive the Clatsop County government is to local businesses. Thirty-nine percent of respondents thought the County government is somewhat supportive or very supportive to local businesses, 29% thought the government is somewhat unsupportive or very unsupportive to local businesses, and 33% thought the government is neither supportive or unsupportive to local businesses.

Figure 3-5. Survey respondents' perception of how supportive Clatsop County government is to local business



Source: Clatsop County Resident Survey, 2004

Survey respondents were asked to list the top three steps that Clatsop County government could take to improve the County as a place to do business. CPW sorted the responses into general categories, which are shown in Table 3-8. A full transcript of responses is in Appendix D under question 7. The top three steps are streamline regulations, focus more on the economy, and reduce the tax burden. The responses in the "other" category included concerns about parking, public education, infrastructure development, and government attitudes.

Table 3-8. Steps that Clatsop County government can take to improve to the County as a place to do business

Top Three Steps for Improvement	Number	Percent
Streamline regulations	69	20%
Focus more on the economy	60	17%
Reduce the tax burden	21	6%
Make government more efficient	16	5%
Improve all types of transportation	15	4%
Improve the roads	14	4%
Improve attitudes towards growth	13	4%
Address social problems	12	3%
Encourage well-paying jobs	9	3%
Tax incentives	6	2%
Focus more on environmental quality	5	1%
Improve port facility	5	1%
Increase tourism	5	1%
Focus less on environmental quality	4	1%
Address problems with housing quality and affordability	4	1%
Improve Internet access	3	1%
Focus on problems from a regional perspective	3	1%
Improve workforce training	2	1%
Other	86	24%

Source: Clatsop County Resident Survey, 2004

The survey asked respondents to choose the three most and least attractive characteristics of Clatsop County for employers, shown in Table 3-9. The top three most attractive characteristics were: quality of life, the natural environment, and availability of land. The top three least attractive characteristics were: a well-trained labor force, the labor pool, and the permitting process. The characteristics that were rated as least and most attractive by a similar number of respondents were: the educational system, access to medical care, and availability of land.

Table 3-9. The most and least attractive characteristics of Clatsop County for employers

Characteristic	Most Attractive		Least Attractive	
	Number	Percent	Number	Percent
Access to medical care	23	13%	20	11%
Access to shipping	22	12%	34	19%
Availability of land	37	20%	32	17%
Availability of raw materials	17	9%	11	6%
Availability of technology	4	2%	34	19%
Business clusters	17	9%	11	6%
County government	6	3%	35	19%
Educational system	21	11%	21	11%
Housing availability	22	12%	35	19%
Labor pool	25	14%	62	34%
Natural environment	123	67%	4	2%
Permitting process	4	2%	58	32%
Quality of life	151	83%	0	0%
Tax structure	6	3%	33	18%
Tax structure	4	2%	31	17%
Transportation system	17	9%	44	24%
Well trained labor force	12	7%	70	38%

Source: Clatsop County Resident Survey, 2004

Plans for Business Expansion

Understanding plans for business expansion is important for understanding perceptions of the local economy and business expansion. It is also relevant to land use planning efforts. The survey asked respondents questions about their plans for expansion in the next five years.

Table 3-10 shows respondents' plans for business expansion in the next five years. Fifty-three percent of respondents planned to expand their businesses in the next five years. Of those planning expansion, 80% of respondents planned to expand their business in Clatsop County.

Table 3-10. Respondents' plans for business expansion in the next five years

	Answer	Number	Percent
Do you plan to expand your business in the next 5 years?	Yes	92	53%
	No	84	47%
If you do, will you expand it in Clatsop County?	Yes	70	80%
	No	17	20%

Source: Clatsop County Resident Survey, 2004

Table 3-11 shows the expansion plans of survey respondents for the next five years by industry. About 52% of respondents indicated that they planned to expand their business in the next five years. While

businesses in all industries plan for expansion, some show a higher probability of expansion than others. The industries that were most likely to expand (those with the highest percentages of plans to expand and with the most respondents) include: construction; agriculture, forestry, and fishing; retail trade; and eating and drinking establishments.

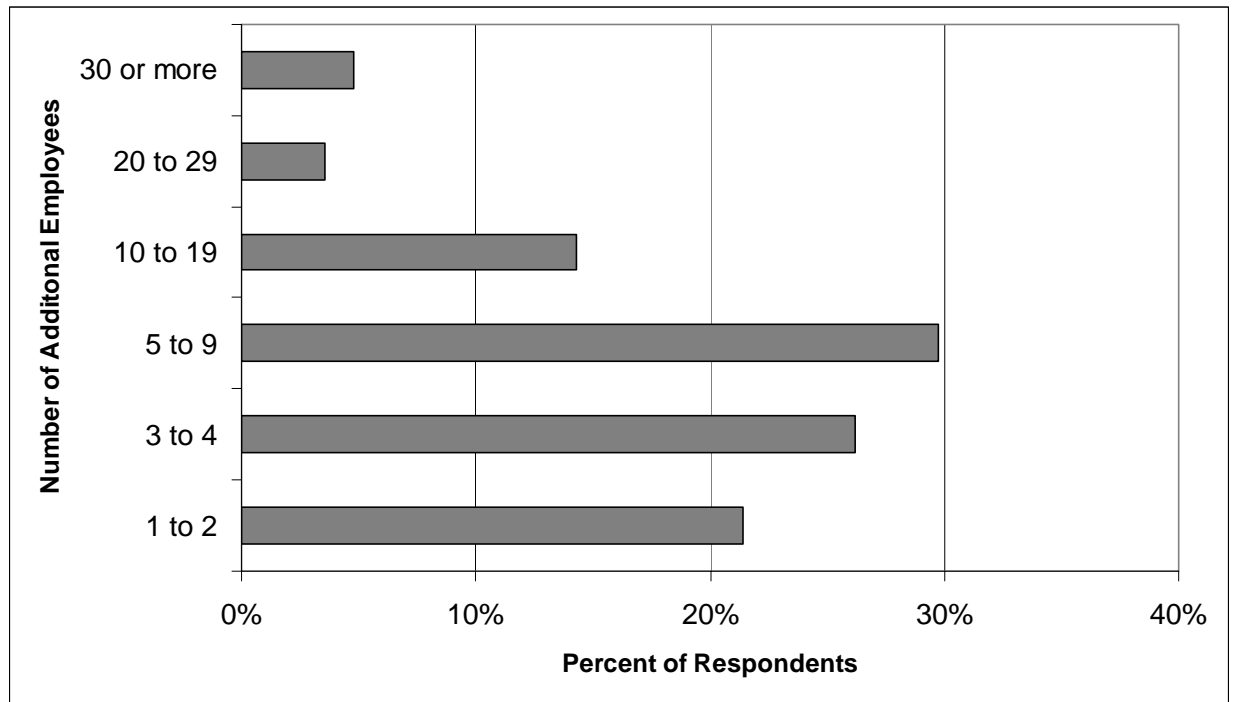
Table 3-11. Expansion plans for the next five years by industry

Industry	Yes	No	Total
Agriculture, Forestry, Fishing	56%	44%	16
Construction	79%	21%	14
Business Services	62%	38%	13
Food Processing	33%	67%	3
Lodging	33%	67%	9
Eating/Drinking Establishment	47%	53%	17
Other Services	80%	20%	5
Other	48%	52%	29
Transportation, Communication,	20%	80%	5
Finance, Insurance, Real Estate	43%	57%	7
Health Services	50%	50%	12
Wood Projects Manufacturing	100%	0%	1
Retail Trade	48%	52%	27
Education or Training	60%	40%	5
Wholesale Trade	50%	50%	2
Other Manufacturing	83%	17%	6
Total	53%	47%	171

Source: Clatsop County Resident Survey, 2004

Of the 92 businesses who answered that they plan to expand their business in the next 5 years, 84 businesses indicated that they plan to add new employees. The mean number of employees that businesses planned to add is 9.2 employees. Figure 3-6 shows the number of employees that businesses planned to hire for expansion. More than three-quarters of businesses planned to add 9 or fewer employees.

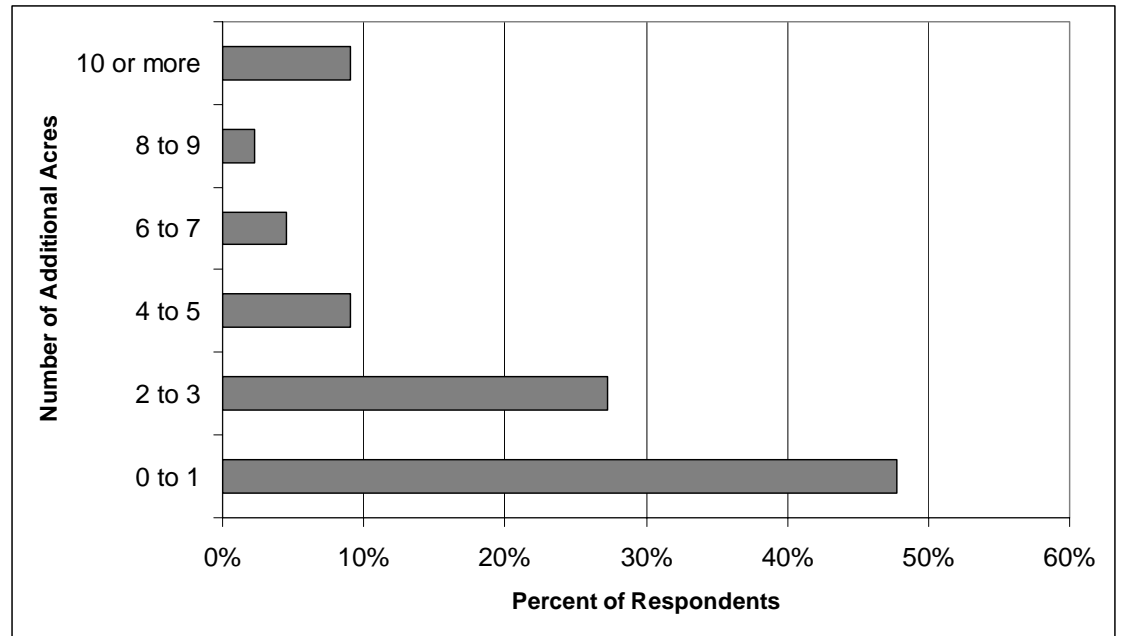
Figure 3-6. Number of employees respondents planned to add in the next five years.



Source: Clatsop County Resident Survey, 2004

Figure 3-7 shows that 44% of respondents indicated that they will need land to expand their business. Of those respondents, 48% indicate that they will need one or fewer acres for expansion and 27% indicate that they will need two to three acres. The mean number of acres that respondents need is 3.2 acres.

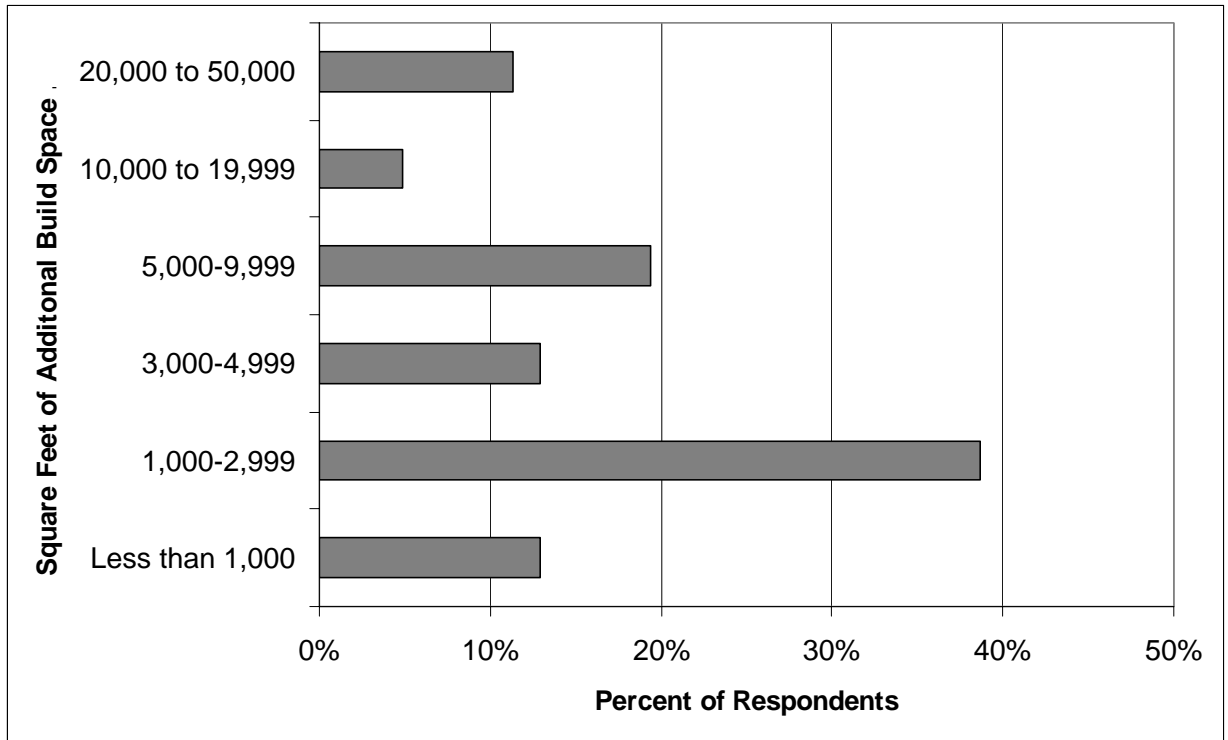
Figure 3-7. Number of acres needed by respondents that planned to expand their business in the next five years.



Source: Clatsop County Resident Survey, 2004

Sixty-two respondents indicated that they will need more building space to expand their business. Figure 3-8 shows the amount of additional building space that respondents thought they would need for business expansion. Slightly more than half of those respondents indicated that they would need less than 3,000 square feet of building space for their expansion, with 13% needing less than 1,000 square feet and 39% needing between 1,000 and 2,999 square feet.

Figure 3-8. Square feet of building space needed by respondents that plan to expand their business in the next five years.



Source: Clatsop County Resident Survey, 2004

Respondents were asked what areas of assistance are most needed to help their business grow and succeed, shown in Table 3-12. The most common types of assistants that respondents need were: reduction of health care costs, reduction of regulations and fees, streamlining the permitting process, reducing taxes, and employee education and training.

Table 3-12. Type of assistance that would most help businesses grow and succeed

Type of Assistance	Number	Percent
Reduce health care costs	93	51%
Reduce regulations & fees	76	42%
Streamline permitting processes	72	39%
Cut/lower taxes	69	38%
Employee education and training	44	24%
Availability of capital	43	23%
Improve transportation infrastructure	43	23%
Provide affordable housing	39	21%
Increase land availability	35	19%
Communications infrastructure	33	18%
Employee retention	32	17%
Information on local market characteristics	28	15%
Employee recruitment	27	15%
Information about available resources	25	14%
Financial support	24	13%
Networking groups/business clusters	20	11%
Wage issues/overtime issues	19	10%
No assistance needed	9	5%
Other	7	4%
Not sure	6	3%

Source: Clatsop County Resident Survey, 2004

Key Findings

- Most respondents are small businesses, with four or fewer employees and annual revenues of \$500,000 or less. About one-third of the businesses have been in Clatsop County for 30 years or more.
- Less than 10% of survey respondents rated Clatsop County as an excellent place to do business. About 35% of respondents rated the County as a good place to do business and about 45% rated it as a fair place to do business. Slightly more than 10% rated the County as a poor place to do business.
- When asked whether the County is a better place to do business now that it was five years ago, 32% of respondents thought the County is a better place to conduct business, 16% of businesses thought the County is a worse place to do business, and 16% thought that conducting business in the County is both better and worse. Twenty-nine percent of respondents thought that conducting business in the County has not changed in the last five-years.

- Business respondents think that quality of life characteristics, including recreation opportunities, quality of life, environmental quality, and community safety, have positive effects on Clatsop County as a place to do business.
- Business respondents think that regulatory practices, the tax burden, economic issues, and lack of a well-trained labor force have a negative effect on businesses in Clatsop County.
- Thirty-nine percent of respondents thought the County government is somewhat supportive or very supportive to local businesses, 29% thought the government is somewhat unsupportive or very unsupportive to local businesses, and 33% thought the government is neither supportive or unsupportive to local businesses.
- Fifty-three percent of businesses indicate that they plan to expand in the next five years. Eighty percent of these businesses plan to expand in Clatsop County. They expect to hire an average of 9.2 new employees, need an average of 3.2 acres for expansion, and need an average of an additional 3,000 square feet of floor space.

Chapter 4

Economic Development Policies

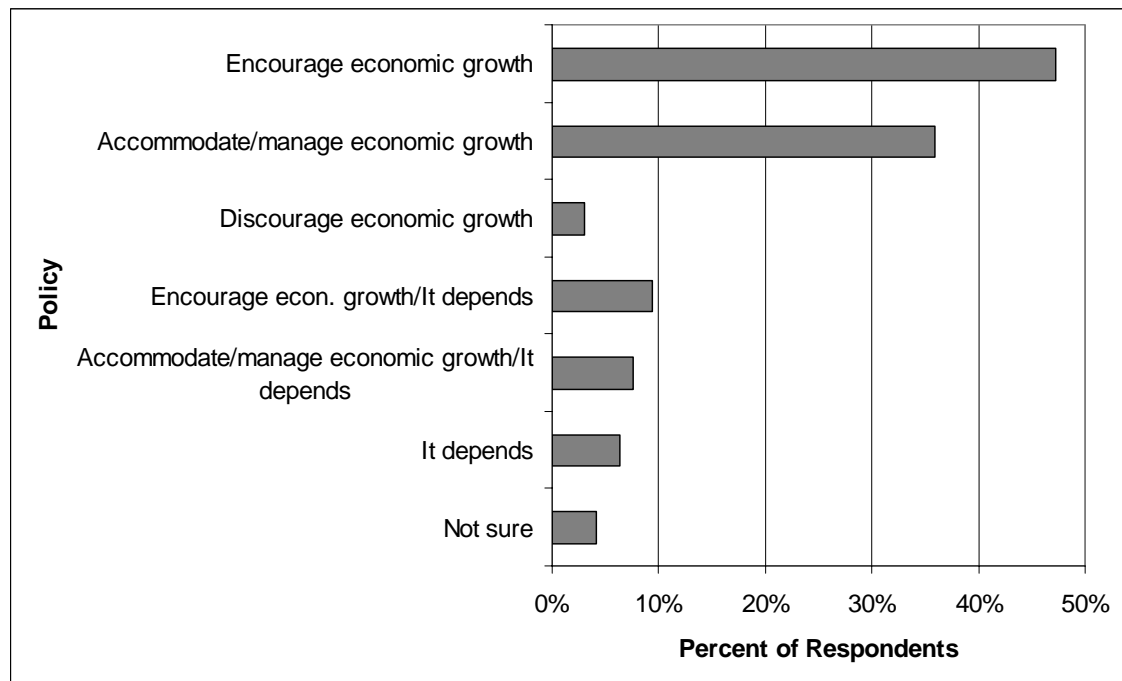
This chapter focuses on residential and business opinions about potential economic development policies. CPW asked respondents to both surveys a set of broad questions about support for economic growth. We then asked specific questions about respondents' perceptions concerning types of economic development policies.

The results from the residential survey are presented first and are followed by the results from the business survey. Finally, we compare the results of several questions about economic development policies that CPW asked in both surveys.

Residential Opinions about Economic Development Policies

Figure 4-1 shows residents' opinion of what Clatsop County's policy concerning economic growth should be. About 47% of respondents thought the County should encourage economic growth and 36% of respondents thought that the County should accommodate and manage economic growth. Relatively few respondents (3%) thought that the County should discourage economic growth.

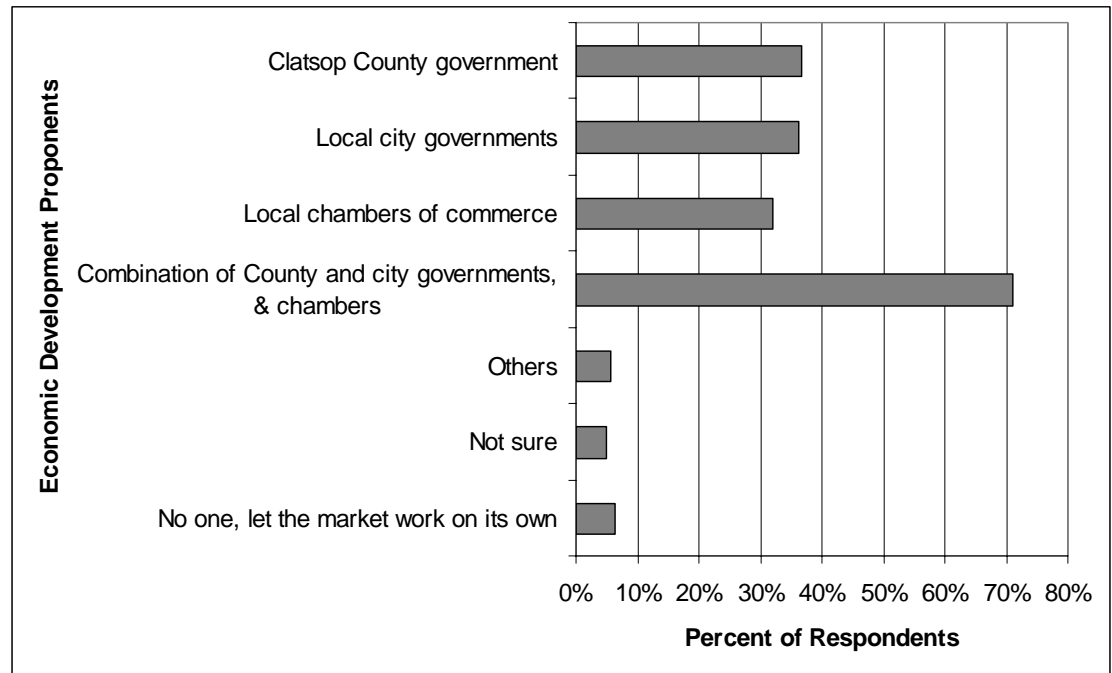
Figure 4-1. Broad policies for economic growth



Source: Clatsop County Resident Survey, 2004

The survey asked respondents their opinion of who should promote economic development in Clatsop County.¹¹ Figure 4-2 shows that 71% of respondents thought that economic development should be promoted by a combination of the County government, local city governments, and local chambers of commerce. Six percent of respondents thought that no one should promote economic development and that the market should be left to work on its own.

Figure 4-2. Residential opinions about who should promote economic development

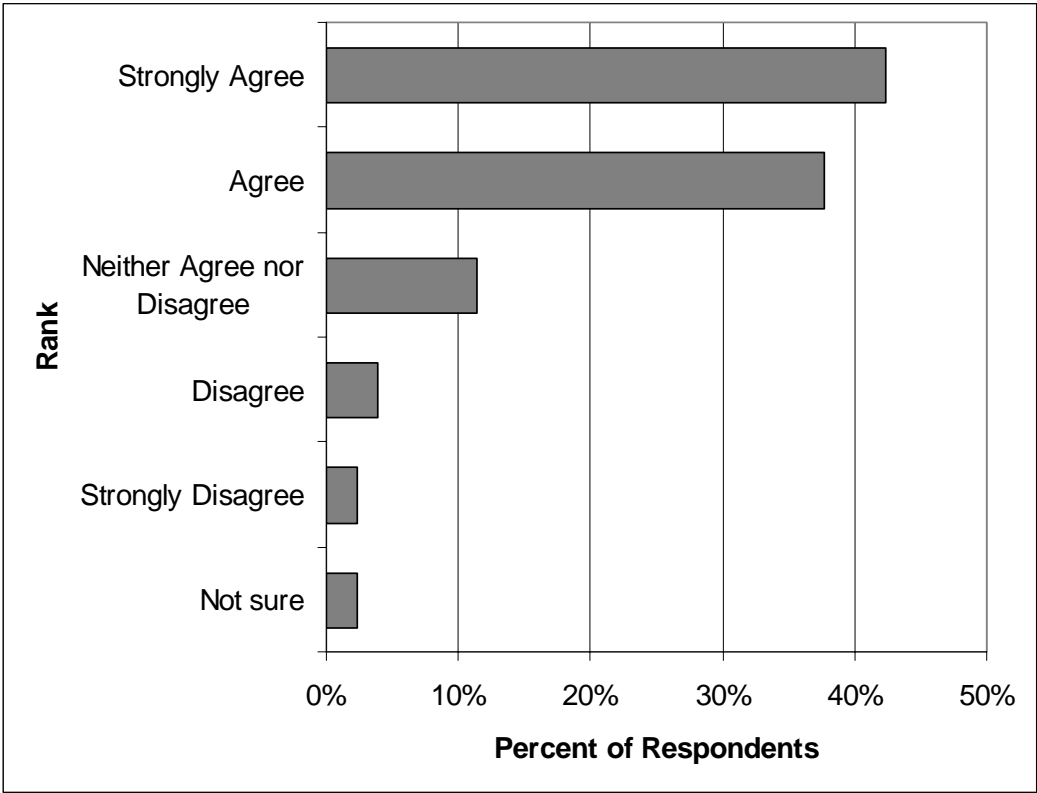


Source: Clatsop County Resident Survey, 2004

Figure 4-3 shows that 80% of residents either "strongly agree" or "agree" that the County government should work to attract new businesses. Eleven percent of residents were neutral about whether the County should work to attract new businesses and about 6% of respondents "disagree" or "strongly disagree" with the idea that the County government should attempt to attract new businesses.

¹¹ Respondents could select more than one option for who should promote economic development.

Figure 4-3. Should the County government work to attract new businesses



Source: Clatsop County Resident Survey, 2004

The survey asked what new types of business the County should try to recruit to the area, if it was working to bring new businesses into the area. Table 4-1 shows that the top three choices of businesses were high-tech, education or training, and health services. The County currently has little or no high-tech business. And the results in Chapter 2 about the need for additional education and training indicate that residents perceived a lack of education and training opportunities. The respondents indicated little need for more lodging; eating and drinking establishments; and finance, insurance, and real estate businesses.

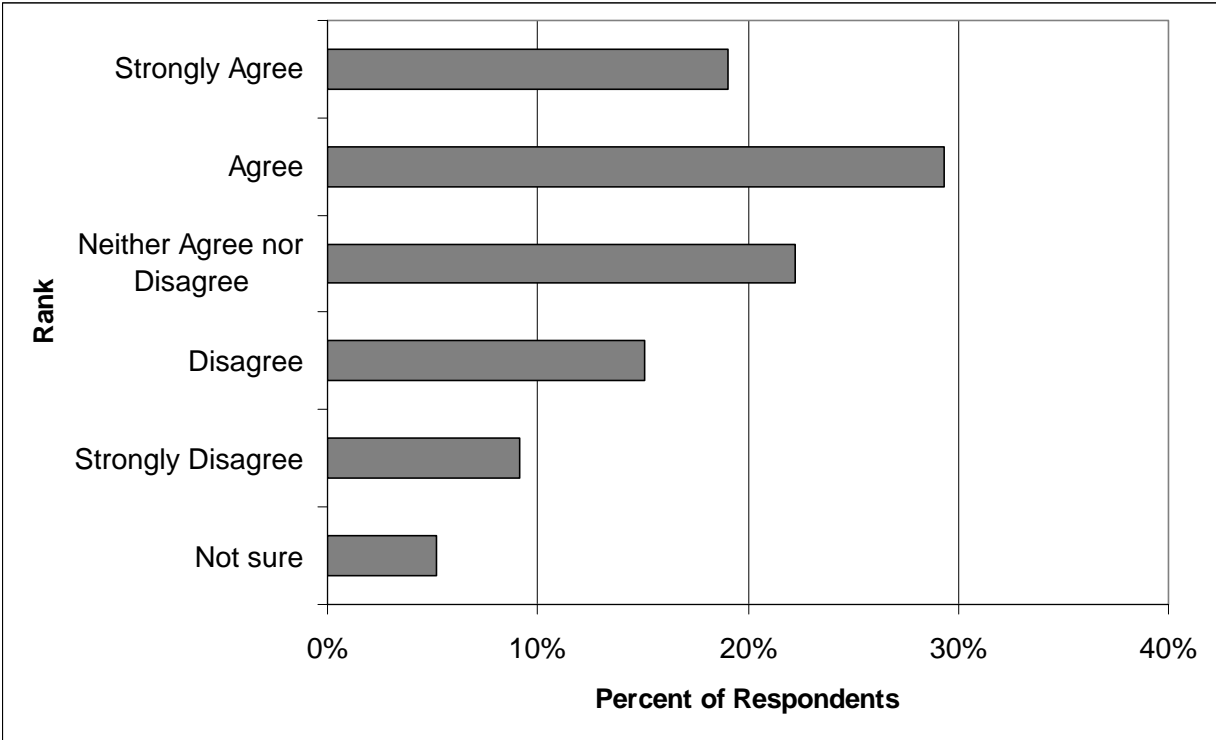
Table 4-1. Respondents' opinion about the type of businesses that the Clatsop County government should attract

Types of Businesses to Recruit	Number	Percent
High-tech	127	48%
Education or Training	120	45%
Health Services	119	45%
Wood Projects Manufacturing	101	38%
Agriculture, Forestry, Fishing	100	38%
Other Manufacturing	87	33%
Transportation, Communication	86	32%
Construction	78	29%
Business Services	75	28%
Retail Trade	75	28%
Food Processing	72	27%
Wholesale Trade	58	22%
Lodging	37	14%
Eating/Drinking Establishment	37	14%
Finance, Insurance, Real Estate	26	10%
Other	24	9%
Other Services	7	3%

Source: Clatsop County Resident Survey, 2004

The survey asked respondents whether the County government should use financial incentives, such as tax abatements or loans, to attract new businesses. Figure 4-4 shows that 19% of respondents "strongly agree" with this idea and 30% of respondents "agree" with it. Twenty-two percent of respondents were neutral about using financial incentives to attract new businesses. Nearly one-quarter of people were not in favor of using financial incentives to attract new businesses, with 15% of respondents disagreeing and 9% of respondents strongly disagreeing with the idea.

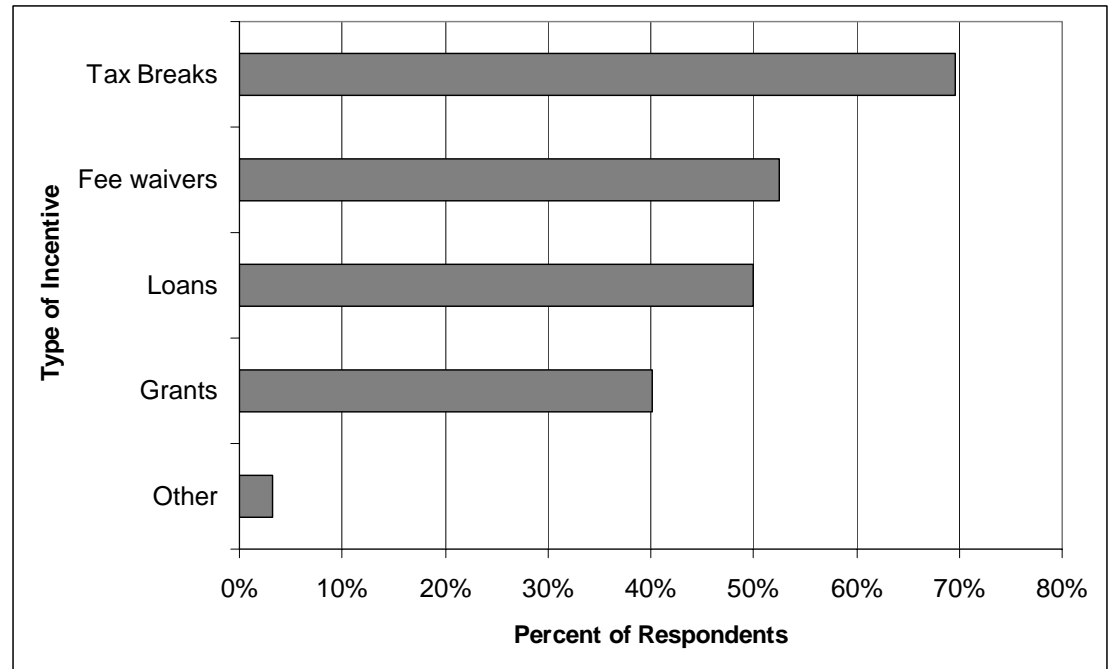
Figure 4-4. Respondents' opinion about whether the County should use financial incentives to attract new business



Source: Clatsop County Resident Survey, 2004

As a follow-up question, the survey asked respondents who strongly agreed or agreed with using financial incentives what types of financial incentives should be used to attract new businesses. Nearly 70% of respondents indicated that the County should use tax breaks, 53% indicated the County should use fee waivers, and 50% think the County should use loans to attract new businesses. Forty percent of respondents thought that the County should use grants to attract new businesses.

Figure 4-5. Type of financial incentives that respondents think Clatsop County government should use



Source: Clatsop County Resident Survey, 2004

When asked if they think that there are barriers to economic development in Clatsop County, 70% responded that they thought there are barriers to economic development. Table 4-2 shows generalizations of the types of barriers that respondents listed. A full transcript of respondents' answers can be found in Appendix B, under question 16. There was no particular barrier that respondents specified with a high frequency. The most common categories of barriers were: transportation issues, government attitude, and a negative attitude towards growth. The concerns in the "other" category were varied and included concerns about taxes, the government, and the environment.

Table 4-2. Barriers to economic development as reported by residential survey respondents

Barriers to Economic Development	Number	Percent
Transportation issues	35	13%
Other	23	12%
Government attitude	21	11%
Negative attitude to growth	21	11%
Community attitudes	16	8%
Rural Location	13	7%
Lack of skilled workers	13	7%
Desire for a diverse economy	11	6%
High cost or lack of available land	11	6%
Lack of well paying jobs	9	5%
Regulations, planning, or permitting	7	4%
Need less focus on environmental quality	6	3%
Lack of good port facilities	2	1%
Need more focus on environmental quality	1	1%
Need better automotive transportation	1	1%

Source: Clatsop County Resident Survey, 2004

The survey asked a series of questions to assess residents' opinions about what economic development policies and strategies the County should have. Table 4-3 shows the responses, ranked by the mean score (where 1=strongly agree and 5=strongly disagree).¹² The questions that had the lowest scores (i.e. the strongest agreement) were that the County should: have strong policies to maintain environmental quality, actively recruit businesses, have policies that help to create more affordable housing, help retain and expand existing businesses, market itself to new businesses, and streamline the development permitting process. The policies and strategies with the least agreement were that the County should: assist businesses in identifying new markets, provide employee-training opportunities, represent firms at local trade shows, provide employee recruitment services to businesses, provide assistance to businesses facing financial difficulty, and engage in public/private partnerships with businesses.

¹² The value for the answer "not sure" is not included in the calculation of the characteristics' mean.

Table 4-3. Residential respondents' opinions of potential economic development policies for Clatsop County

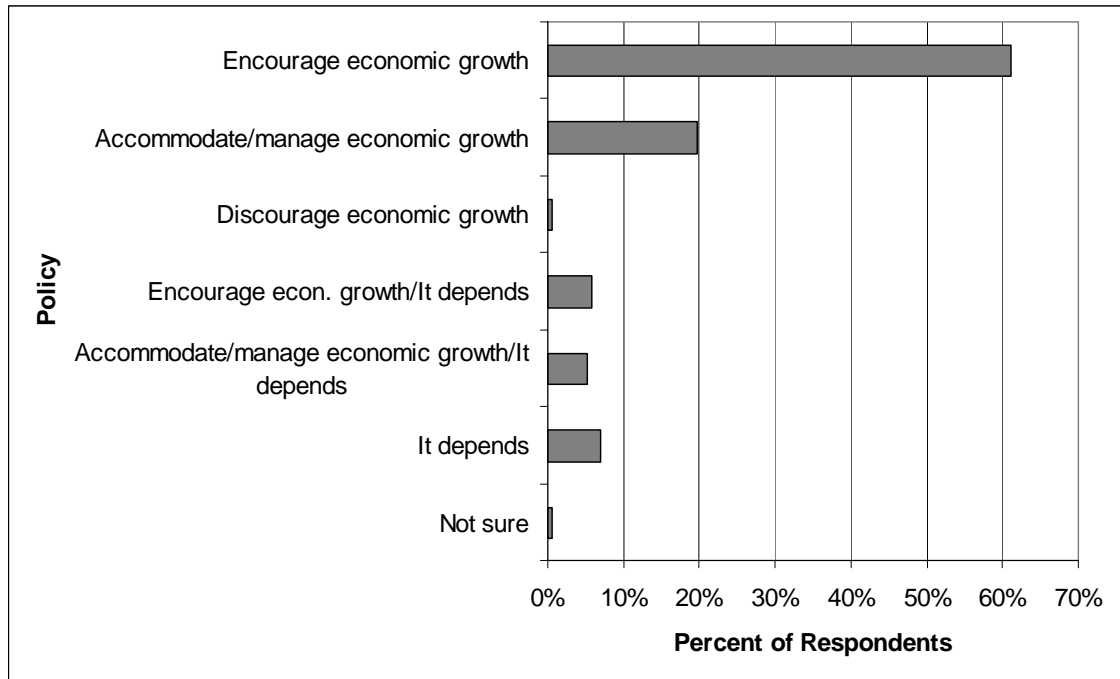
Economic Development Policies & Strategies	Percentage of Respondents						Mean
	Strongly Agree	Agree	Neither	Disagree	Strongly Disagree	Not sure	
The County should have strong policies to maintain environmental quality.	40%	40%	16%	3%	0%	1%	1.84
The County should actively recruit businesses.	33%	42%	16%	6%	3%	1%	2.04
The County should adopt policies that will create more affordable housing for workers.	23%	52%	17%	5%	1%	2%	2.07
The County should take steps to help retain and expand existing businesses.	23%	52%	18%	4%	2%	1%	2.08
The County should market itself to new businesses.	25%	47%	17%	8%	2%	2%	2.13
The County should streamline the development permitting process.	24%	41%	23%	6%	1%	4%	2.15
The County should provide financial incentives to	20%	34%	26%	13%	4%	2%	2.47
The County should reduce development fees.	17%	29%	34%	10%	4%	6%	2.52
The County should provide financial incentives, such as tax breaks, waivers, loans, or grants, to businesses currently located in the County to encourage business growth.	18%	33%	26%	16%	5%	3%	2.56
The County should have more industrial lands available for development.	17%	36%	23%	15%	6%	3%	2.57
The County should assist businesses in identifying new markets.	11%	41%	30%	12%	4%	2%	2.58
The County should provide employee-training opportunities.	14%	38%	25%	18%	4%	1%	2.59
The County should represent local firms at trade shows.	13%	29%	34%	15%	6%	2%	2.71
The County should provide employee recruitment services to businesses.	8%	31%	34%	19%	5%	2%	2.82
The County should provide assistance to businesses facing financial difficulty.	8%	24%	42%	20%	4%	2%	2.86
The County should engage in public/private partnerships with businesses.	7%	24%	32%	22%	8%	6%	2.99

Source: Clatsop County Resident Survey, 2004

Business Opinions about Economic Development Policies

Figure 4-6 shows business opinions of what Clatsop County's policy concerning economic growth should be. The 61% of respondents thought the County should encourage economic growth and 20% of respondents thought that the County should accommodate and manage economic growth. Only one respondent (less than 1%) thought that the County should discourage economic growth.

Figure 4-6. Business respondents' opinion of what Clatsop County's policy concerning economic growth should be

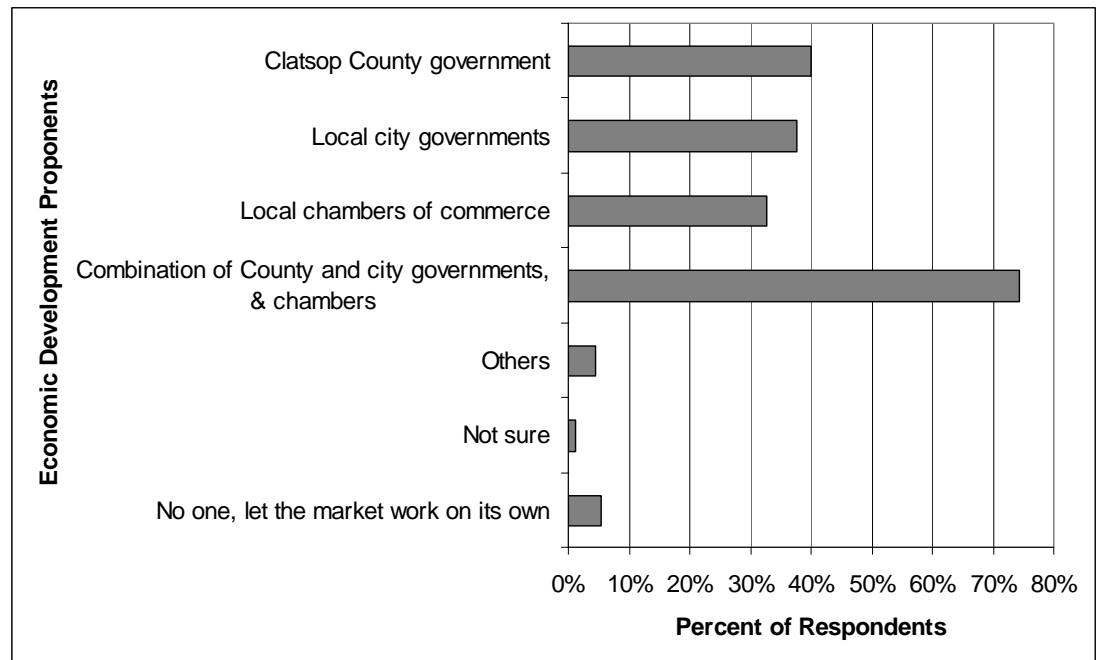


Source: Clatsop County Resident Survey, 2004

The survey asked respondents their opinion of who should promote economic development in Clatsop County¹³. Figure 4-7 shows that 74% of respondents thought that economic development should be promoted by a combination of the County government, local city governments, and local chambers of commerce. Five percent of respondents think that no one should promote economic development and that the market should be left to work on its own.

¹³ Respondents could select more than one option for who should promote economic development.

Figure 4-7. Business respondents' opinions about who should promote economic development



Source: Clatsop County Resident Survey, 2004

Eighty-six percent of respondents thought that there are barriers to economic development in Clatsop County. Table 4-4 shows generalizations of the types of barriers that respondents listed. A full transcript of respondents' answers can be found in Appendix D, under question 12. The most common categories of barriers were: streamlining regulations and need for greater focus on economic development by the government. The responses that we classified as "other" cover a wide range of issues, including concerns about taxes and fees, government, and poor community attitudes.

Table 4-4. Barriers to economic development as reported by business survey respondents

Barriers to Economic Development	Number	Percent
Other	86	24%
Streamline Regulations	69	20%
More focus on economic development	60	17%
Reduce tax burden	21	6%
Make government more efficient	16	5%
Improve transportation	15	4%
Improve roads	14	4%
Improve attitude to growth	13	4%
Address social problems	12	3%
Encourage well-paying jobs	9	3%
Tax incentives	6	2%
More focus on environmental quality	5	1%
Improve port facilities	5	1%
Increase tourism	5	1%
Less focus on environmental quality	4	1%
Improve housing availability and affordability	4	1%
Improve Internet access	3	1%
Increase regional focus	3	1%
Increase workforce training	2	1%

Source: Clatsop County Resident Survey, 2004

The survey asked a series of questions to find business's opinions about what economic development policies and strategies the County should have. Table 4-5 shows the responses, ranked by the mean score (where 1=strongly agree and 5=strongly disagree).¹⁴ The questions that had the lowest scores (i.e. the strongest agreement) were that the County should: streamline the development permitting process, actively recruit businesses, help retain and expand existing businesses, market itself to new businesses, have more industrial lands, and reduce development fees. The policies and strategies with the least agreement were that the County should: have policies that help to create more affordable housing, represent firms at local trade shows, provide employee-training opportunities, engage in public/private partnerships with businesses, provide employee recruitment services to businesses, and provide assistance to businesses facing financial difficulty.

¹⁴ The value for the answer "not sure" is not included in the calculation of the characteristics' mean.

Table 4-5. Business respondents' opinions of potential economic development policies for Clatsop County

Economic Development Policies & Strategies	Percentage of Respondents						Mean
	Strongly agree	Agree	Neutral	Disagree	Strongly Disagree	Not sure	
The County should streamline the development	43%	36%	12%	3%	1%	5%	1.79
The County should actively recruit businesses.	51%	27%	13%	5%	2%	2%	1.79
The County should take steps to retain and expand existing businesses.	35%	48%	12%	4%	1%	1%	1.87
The County should market itself to new businesses.	30%	47%	9%	10%	3%	1%	2.08
The County should have more industrial lands available for development.	27%	35%	21%	9%	3%	5%	2.21
The County should reduce development fees.	28%	25%	33%	6%	2%	6%	2.25
The County should provide financial incentives to attract new employment.	29%	31%	19%	13%	3%	4%	2.28
The County should have strong policies to maintain environmental quality.	25%	32%	29%	10%	4%	1%	2.35
The County should provide financial incentives, such as tax breaks, waivers, loans, or grants, to businesses currently located in the County.	27%	30%	19%	16%	4%	5%	2.38
The County should adopt policies that will create more affordable housing for workers.	20%	28%	32%	11%	7%	2%	2.56
The County should assist businesses in identifying new markets.	17%	30%	31%	14%	4%	3%	2.57
The County should represent local firms at trade shows.	16%	23%	28%	20%	9%	3%	2.81
The County should provide employee-training opportunities.	12%	24%	28%	27%	8%	1%	2.95
The County should engage in public/private partnerships with businesses.	12%	24%	23%	23%	16%	2%	3.05
The County should provide employee recruitment services to businesses.	11%	18%	30%	29%	9%	2%	3.07
The County should provide assistance to businesses facing financial difficulty.	10%	13%	33%	30%	11%	3%	3.21

Source: Clatsop County Resident Survey, 2004

The survey asked respondents to evaluate a series of policies and processes in terms of their impact on Clatsop County as a place to do business. Table 4-6 shows the business managers' evaluation of these policies and processes. None of the policies or processes were rated as having a positive impact on business by more than 8% of respondents. Local tax policies were rated as negative by 34% of respondents and utility system development charges were rated negatively by 38% of respondents. Building permits, infrastructure development, land use application, and land use code were all rated as having a negative impact on business by more than 45% of respondents.

Table 4-6. Business respondents' evaluation of the impact of these policies or processes on Clatsop County as a place to do business

Policies and Processes	Positive	Neutral	Negative	Not Sure
Building permits	6%	31%	47%	17%
Infrastructure development (i.e. roads, airport, sewer)	8%	39%	46%	8%
Land use application	6%	29%	49%	16%
Land use code	6%	28%	46%	20%
Local tax policies	6%	45%	34%	16%
Utility system development charges	4%	42%	38%	16%
Other	7%	7%	36%	50%

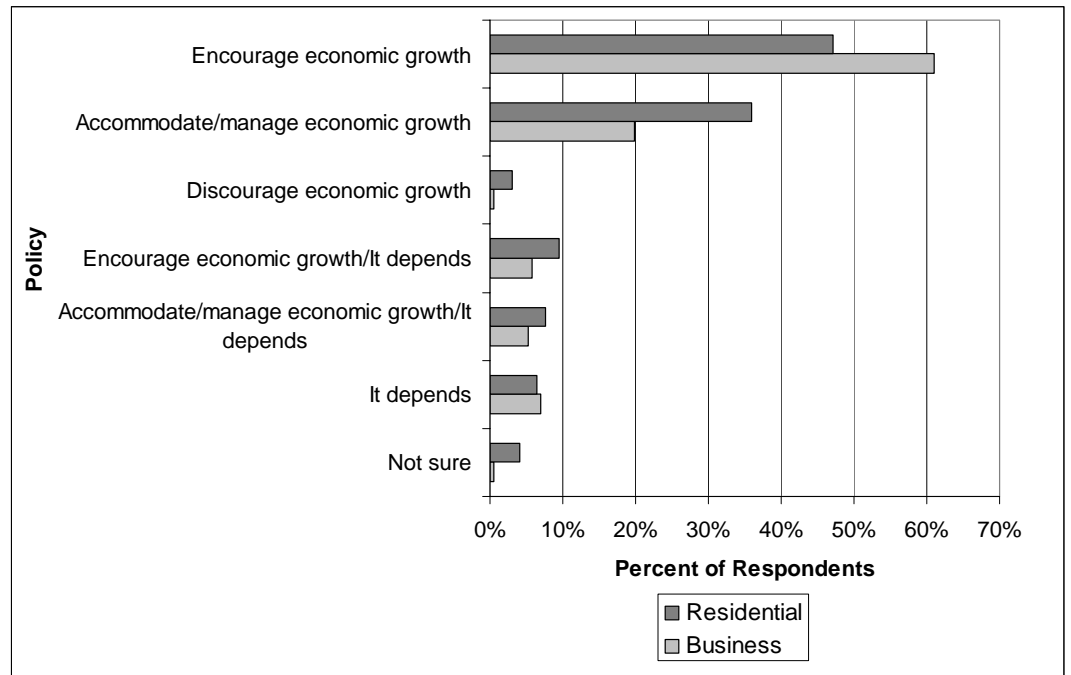
Source: Clatsop County Resident Survey, 2004

Comparison of Residential and Business Opinions about Economic Development Policies

Both the residential and business surveys asked respondents the following questions: what they think the County government's policy towards economic growth should be; who should work to promote economic development; whether there are barriers to economic growth and what they are; and their opinions of specific economic development policies and strategies. The following section offers a comparison of the results of these questions for the two surveys.

Figure 4-8 shows a comparison between resident and business opinions about what the County's policy concerning economic growth should be. In general, the responses on these questions were similar except that business respondents think that the County's policy towards economic growth should be to encourage it more frequently than respondents to the residential survey. More respondents to the residential survey thought that the County's policy should be to accommodate and manage economic growth. Few respondents on either survey indicated that the County's policy should be to discourage economic growth.

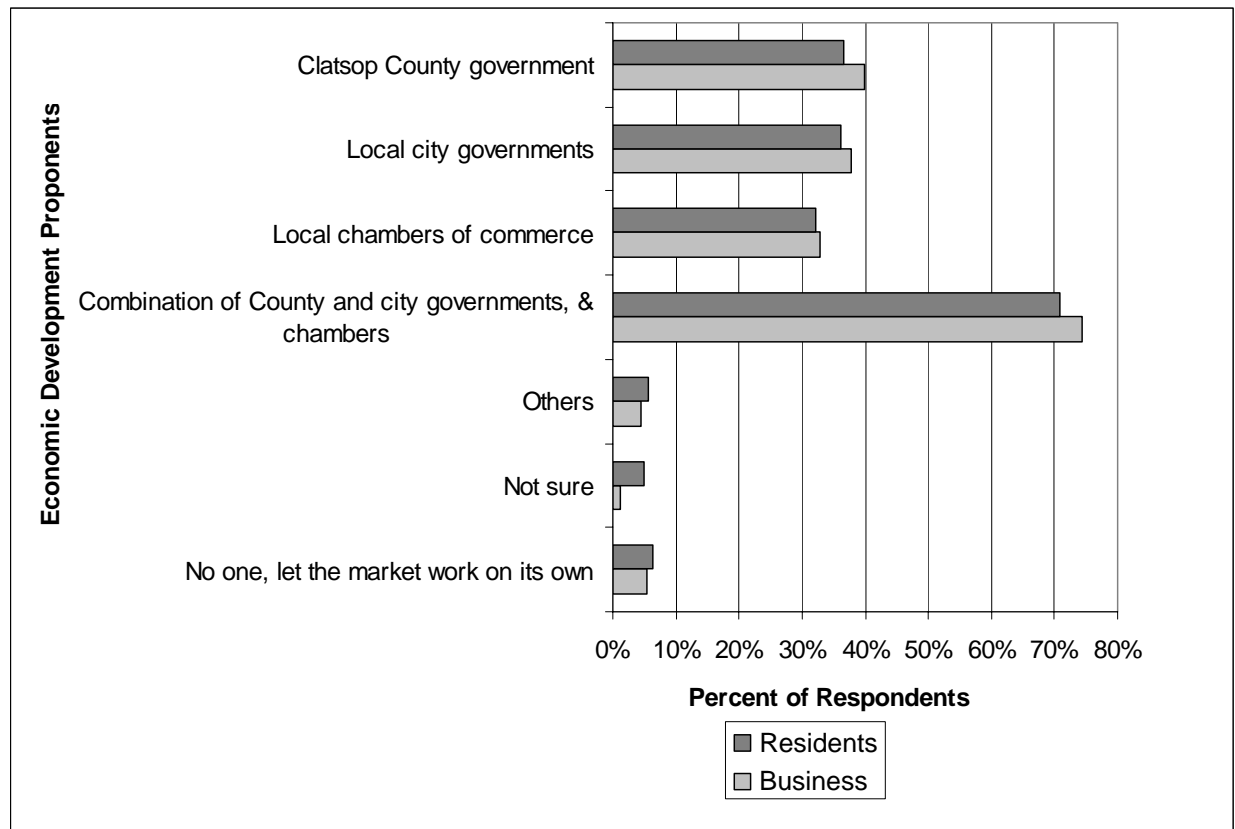
Figure 4-8. Comparison of business and residents opinion of what Clatsop County's policy concerning economic growth should be



Source: Clatsop County Resident Survey, 2004

Figure 4-9 shows that respondents to both surveys agreed that economic development should be promoted by a combination of County and city governments and the local chambers of commerce.

Figure 4-9. Comparison of business and residents opinions about who should promote economic development



Source: Clatsop County Resident Survey, 2004

Business respondents indicated that they think there are barriers to economic development more frequently than residents but respondents to both surveys perceived that there are barriers to economic development in Clatsop County. Business and residential respondents had very different concerns. Businesses perceived regulations and the lack of focus on economic development by the government as significant barriers. Residents perceived transportation, government attitudes, and a negative attitude about growth as barriers to economic development.

Business and residential respondents' opinions differed about the policies that Clatsop County should have for economic development. In general terms, residential respondents agreed more with the following policies and strategies than business respondents:

- The County should have strong policies to maintain environmental quality.
- The County should adopt policies that will create more affordable housing for workers.
- The County should provide employee training opportunities.

- The County should provide assistance to businesses facing financial difficulty.

In general, business respondents agreed more with the following policies and strategies than residential respondents:

- The County should streamline the development permitting process.
- The County should have more industrial lands available for development.
- The County should reduce development fees.
- The County should actively recruit businesses.

Business and residential respondents generally had the same level of agreement with the following policies and strategies:

- The County should market itself to new businesses.
- The County should assist businesses in identifying new markets.
- The County should engage in public/private partnerships with businesses.

Key Findings

- A large majority of businesses and residents are in favor of economic growth and think that the County should either encourage economic growth or accommodate and manage it. About 47% of respondents thought the County should encourage economic growth and 36% of respondents thought that the County should accommodate and manage economic growth. Relatively few respondents (3%) thought that the County should discourage economic growth.
- Businesses and residents think that economic development should be promoted by a combination of County and city governments and the local chambers of commerce.
- Respondents perceive that there are barriers to economic development in Clatsop County. Businesses perceived regulations and the lack of focus on economic development by the government as significant barriers. Residents perceived transportation, government attitudes, and a negative attitude about growth as barriers to economic development
- Residential respondents are more in favor of economic development policies and strategies that enhance the quality of life and provide better job training. Business respondents are more in favor of economic development policies and strategies that reduce regulation and fees, increase the

amount of industrial land that is available, and actively recruit new businesses

- Nearly half of residential respondents think that the County should use financial incentives, such as tax abatements or loans, to attract new businesses. The majority of these respondents support the use of tax breaks, fee waivers, loans, and grants to attract new businesses to the County.

Appendix A

Residential Survey Methodology and Survey Instrument

This appendix contains a copy of the survey instrument for the Clatsop County Residential Economic Development survey. The survey was administered in November and December 2004. Following is a discussion of the survey methodology.

The Residential survey focused on: (1) issues about growth and quality of life; (2) issues relating to living in Clatsop County; (3) potential economic development policies; (4) potential expansion of the Clatsop County jail¹⁵; and (5) respondent demographics.

CPW administered the survey by mail to 1,200 residents of Clatsop County. The sample was taken from the voter registration list. The sample was stratified by voter precinct to ensure the sample was geographically representative. Survey recipients were randomly selected from each precinct, based on the number of voters in the precinct proportionate to the total number of registered voters.

To increase the survey response rate, a post card was mailed about one week before surveys were sent out. A reminder post card was mailed about one week after the survey was mailed. CPW received 265 valid responses, eleven undeliverable surveys. The response rate was 22.3%.

¹⁵ Results from questions about potential expansion of the Clatsop County jail are presented in a separate memorandum to the County, rather than in this report.



UNIVERSITY OF OREGON

November 2004

Dear Resident of Clatsop County,

We need your help!

Clatsop County is in the process of developing an economic development strategy. The Community Planning Workshop at the University of Oregon is conducting the survey on behalf of Clatsop County. The County is asking residents their opinions and attitudes growth, quality of life, and economic development in the County. We encourage you to complete the enclosed survey of your opinions.

This survey will be an important part of understanding what growth and economic development policies residents support. The more responses we receive from residents, the better informed we will be to address key issues about our local economy. All responses will be kept confidential. The results of this survey will be used to review economic development strategies.

To encourage you to complete and return the survey, we will enter your name in a drawing for one of four \$25 gift certificates to Fred Meyer. Please fill out the enclosed form after completing the survey, and include it with your survey—or mail it in a separate envelope. If your form is drawn, the Community Planning Workshop will send you a \$25 gift certificate to Fred Meyer. This offer is valid on or before December 1, 2004. Limit one per family.

Your opinions are important to us. Please return your completed survey no later than **Wednesday, November 24th, 2004** in the enclosed postage paid envelope. If you have any questions regarding the survey, please feel free to contact Beth Goodman, Community Planning Workshop Project Manager at 541-346-3653.

Thank you for your participation!

Sincerely,

Bob Parker

Director

Community Planning Workshop

COMMUNITY SERVICE CENTER

1209 University of Oregon, Eugene OR 97403-1209 T (541)346-3889 F (541) 346-2040 <http://darkwing.uoreong.edu/~csco/>

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Clatsop County Economic Development Survey

Instructions: Clatsop County is interested in better understanding the attitudes and opinions of residents related to growth and economic development in the County. The survey has been sent to 1,200 residents of Clatsop County. The Community Planning Workshop at the University of Oregon is conducting the survey on behalf of Clatsop County. The County will use the results to develop economic development policies.

This survey is intended to reflect the opinions of local residents. You should complete the survey based on your individual opinions and experiences living in Clatsop County. Please read each question carefully and answer to the best of your ability. Return your completed survey in the enclosed postage-paid envelope by **Wednesday, November 24, 2004**. Thank you for your time!

Note: Your participation is voluntary and your returned survey indicates your willingness to take part in the study. If you have questions regarding your rights as a research participant, please contact the Office of Human Subjects Compliance, University of Oregon, 5219, Eugene, OR 97403, or call (541) 346-2510.

First, we'd like to ask some questions about growth and quality of life:

Q-1. Between 1990 and 2000, Clatsop County's population grew from 33,301 to 35,630, an average increase of 0.6%. The State projects that the County will have a population of about 41,788 by 2020 if current population trends continue. This will represent an average annual growth of approximately 0.8% or around 308 people per year. How do you feel about this projected growth?

- Acceptable
- Growing too quickly
- Growing too slowly

Q-2. How important do you think each of the following characteristics is to establishing a high quality of life?

Characteristic	Very Important	Important	Neutral	Unimportant	Very Unimportant	Not Sure
Affordable Housing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Variety of housing choices	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Parks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Access to recreation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Quality education system	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Access to higher education	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Diverse economic base	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Living wage jobs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Environmental quality	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Natural resources and habitat protection	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Access to a performing arts center	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Variety of shopping opportunities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Transportation options	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Variety of health care choices	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other (specify): _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Next, we would like to ask some questions about living in Clatsop County:

Q-3. Is Clatsop County better off than it was five years ago?

- Yes
- No
- About the same
- Not sure

Q-4. Are there sufficient opportunities for job training and higher education in Clatsop County?

- Yes (**skip to Q-6**)
- No

Q-5. If you answered "no" to Q-5, what types of job training or education would be most helpful. (Please check all that apply.)

- | | |
|--|--|
| <input type="checkbox"/> Business and finance | <input type="checkbox"/> Maintenance and repair |
| <input type="checkbox"/> Higher education | <input type="checkbox"/> Restaurant or food services |
| <input type="checkbox"/> Forest management | <input type="checkbox"/> Health care |
| <input type="checkbox"/> Adult literacy | <input type="checkbox"/> Trade (such as carpentry or plumbing) |
| <input type="checkbox"/> Office and administrative support | <input type="checkbox"/> Agricultural education |
| <input type="checkbox"/> High-tech | <input type="checkbox"/> Other technical |
| <input type="checkbox"/> Professional | <input type="checkbox"/> Management |
| <input type="checkbox"/> English language | <input type="checkbox"/> Spanish language |
| <input type="checkbox"/> Other (please specify): _____ | |

Q-6. Please rate the current quality of the following services and amenities in Clatsop County.

Characteristic	Very Good	Good	Neutral	Poor	Very Poor
Housing affordability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Variety of housing choices	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Parks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Access to recreation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Quality of the education system	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Access to higher education	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Diversity of the economic base	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Availability of living wage jobs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Environmental quality	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Natural resources and habitat protection	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Access to performing arts center	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Variety of shopping opportunities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Transportation options	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Variety of health care choices	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other (specify): _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Q-7. What percentage of your shopping do you do in Clatsop County?

- 100% to 75%
- 75% to 50%
- 50% to 25%
- 25% or less

Q-8. Which of the following products and services do you purchase in Clatsop County if they are locally available? (Please check all that apply.)

- | | |
|--|---|
| <input type="checkbox"/> Medical services | <input type="checkbox"/> Legal services |
| <input type="checkbox"/> Dental services | <input type="checkbox"/> Clothing and shoes |
| <input type="checkbox"/> Recreation services | <input type="checkbox"/> Furniture and appliances |
| <input type="checkbox"/> Insurance services | <input type="checkbox"/> Auto parts and accessories |
| <input type="checkbox"/> Banking services | <input type="checkbox"/> Pharmaceuticals |
| <input type="checkbox"/> Investment services | <input type="checkbox"/> Computers and electronics |
| <input type="checkbox"/> Travel services | <input type="checkbox"/> Office supplies |

Q-9. If you shop outside of Clatsop County, what are your reasons for doing so? (Please check all that apply.)

- | | |
|---|--|
| <input type="checkbox"/> Price | <input type="checkbox"/> Product quality |
| <input type="checkbox"/> Hours of operation | <input type="checkbox"/> Customer service |
| <input type="checkbox"/> Parking availability | <input type="checkbox"/> Close to work |
| <input type="checkbox"/> Selection | <input type="checkbox"/> Close to other shopping |

Next, we would like to ask some questions about economic development policies:

Q-10. Please indicate what you think the Clatsop County government's policy should be towards economic growth.

- Encourage economic growth
- Accommodate/manage economic growth
- Discourage economic growth
- Not sure
- It depends (explain): _____
- Encourage economic growth/It depends
- Accommodate/manage economic growth/It depends

Q-11. Who do you feel should be working to promote economic development in Clatsop County? (Please check all that apply)

- Clatsop County government
- Local city governments
- Local chambers of commerce
- A combination of Clatsop County government, local city government, and local chambers of commerce
- No one – let the market work on its own
- Not sure
- Others (please specify): _____

Q-12. Do you agree that the Clatsop County government should work to attract new businesses?

- Strongly Agree
- Agree
- Neither Agree nor Disagree
- Disagree
- Strongly Disagree
- Not sure

Q-13. If Clatsop County government was to try to recruit new business into the County, what types of business should the government work to recruit? (Please check all that apply.)

- | | |
|---|---|
| <input type="checkbox"/> Agriculture, Forestry, Fishing | <input type="checkbox"/> Transportation, Communication, Utilities |
| <input type="checkbox"/> Construction | <input type="checkbox"/> Finance, Insurance, Real Estate |
| <input type="checkbox"/> Business Services | <input type="checkbox"/> Health Services |
| <input type="checkbox"/> Food Processing | <input type="checkbox"/> Wood Products Manufacturing |
| <input type="checkbox"/> Lodging | <input type="checkbox"/> Retail Trade |
| <input type="checkbox"/> High-tech | <input type="checkbox"/> Education or Training |
| <input type="checkbox"/> Eating/Drinking Establishment | <input type="checkbox"/> Wholesale Trade |
| <input type="checkbox"/> Other Services | <input type="checkbox"/> Other Manufacturing |
| <input type="checkbox"/> Other (please specify): _____ | |

Q-14. Do you think that the Clatsop County government should use financial incentives, such as tax abatement or loans, to attract new businesses to the County?

- Strongly Agree
- Agree
- Neither Agree nor Disagree (**skip to Q-16**)
- Disagree (**skip to Q-16**)
- Strongly Disagree (**skip to Q-16**)
- Not sure (**skip to Q-16**)

Q-15. If you answered "Strongly Agree" or "Agree" to Question 15, what types of financial incentives should the Clatsop County use to attract new business? (Please check all that apply.)

- Tax Breaks
- Fee waivers
- Loans
- Grants
- Other
- I did not "Strongly Agree" or "Agree" with Question 15

Q-16. Do you think there are barriers to economic development in Clatsop County?

- No
- Yes → What are they? _____

Q-17. Please check the box that best represents your opinion regarding what Clatsop County government *should* do as local economic development policies and strategies.

Statement	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree	Not Sure
The County should actively recruit businesses.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The County should reduce development fees.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The County should have more industrial lands available for development.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The County should have strong policies to maintain environmental quality.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The County should streamline the development permitting process.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The County should provide financial incentives to attract new employment.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The County should provide financial incentives, such as tax breaks, waivers, loans, or grants, to businesses currently located in the County to encourage business growth.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The County should adopt policies that will create more affordable housing for workers.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The County should take steps to help retain and expand existing businesses.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The County should provide assistance to businesses facing financial difficulty.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The County should provide employee recruitment services to businesses.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The County should provide employee-training opportunities.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The County should engage in public/private partnerships with businesses.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The County should market itself to new businesses.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The County should represent local firms at trade shows.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The County should assist businesses in identifying new markets.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Next, we would like to ask you some questions about the County's jail facilities:

Q-18. Do you think the County needs to increase the capacity of its jail?

- Yes
- No (**skip to Q-22**)
- Not sure

Q-19. Which of the following options do you think the County should use to increase the capacity of its jail?

- Build a new jail
- Enlarge the current jail
- The County does not need to increase the capacity of the jail

Q-20. Would you vote to approve a bond levy to fund increasing the capacity of the jail or building a new jail?

- Yes
- No (**skip to Q-22**)
- Not sure

Q-21. How much would you be willing to pay in additional property taxes per year to fund increasing the capacity of the jail or building a new jail?

- \$25 per year
- \$35 per year
- \$50 per year
- I would not be willing to pay additional taxes for this purpose.

Finally, we would like to ask you some questions about yourself:

Q-22. What is your age? _____ years

Q-23. What is your gender? Male Female

Q-24. How many people live in your household, including yourself?

_____Adults (18 and over) _____Children (17 and under)

Q-25. Which of the following best describes where you live in Clatsop County?

- Astoria
- Seaside
- Gearhart
- Arch Cape
- Other unincorporated Clatsop County
- Warrenton
- Cannon Beach
- Hammond
- East County

Q-26. For the purposes of comparison with U.S. Census data, please estimate your 2003 total household income before taxes:

- | | | |
|---|---|---|
| <input type="checkbox"/> Under \$5,000 | <input type="checkbox"/> \$25,000 to \$29,000 | <input type="checkbox"/> \$50,000 to \$54,999 |
| <input type="checkbox"/> \$5,000 to \$9,999 | <input type="checkbox"/> \$30,000 to \$34,999 | <input type="checkbox"/> \$55,000 to \$59,999 |
| <input type="checkbox"/> \$10,000 to \$14,999 | <input type="checkbox"/> \$35,000 to \$39,999 | <input type="checkbox"/> \$60,000 to \$74,999 |
| <input type="checkbox"/> \$15,000 to \$19,999 | <input type="checkbox"/> \$40,000 to \$44,999 | <input type="checkbox"/> \$75,000 to \$99,999 |
| <input type="checkbox"/> \$20,000 to \$24,999 | <input type="checkbox"/> \$45,000 to \$49,999 | <input type="checkbox"/> \$100,000 or More |

Q-27. Do you rent or own the home in which you presently live?

- Rent
- Own

Q-28. What is the highest level of education that you have completed?

- | | |
|---|---|
| <input type="checkbox"/> Grade School | <input type="checkbox"/> Some College |
| <input type="checkbox"/> Some High School | <input type="checkbox"/> College Graduate |
| <input type="checkbox"/> High School/GED | <input type="checkbox"/> Post Graduate Work |

Q-29. Please share any additional comments that you about quality of life, growth, or economic development in Clatsop County.

ALL RESPONSES WILL BE KEPT CONFIDENTIAL
Thank you for completing the Clatsop County Economic Development survey!

Appendix B

Open-ended Questions from the Residential Survey

This Appendix presents the written comments from the open-ended questions from the Residential survey. On some questions, we have categorized the comments according to theme.

Q-2. How important do you think each of the following characteristics is to establishing a high quality of life?

- Develop high tech infrastructure to support Economic Development.
- None
- Strong law enforcement.
- Keeping traditional jobs – fishing, logging, etc.
- Entertainment
- Affordable and quality childcare.
- The arts.
- Control immigrant numbers.
- Tax base affordable.
- Balanced and fair news reporting.
- Affordable Healthcare.
- More than one grocery store in Astoria (city).
- Openspace on the river – no channel deepening.
- Responsive government.
- Performing Arts Theater.
- Good police, fire, and emergency services
- Jobs
- Historic Preservation
- Rental affordable
- Radio stations

- Clatsop County needs more access to caring physicians, hospitals, and clinics. Especially on the North coast.

Q-5. If you answered "no" to Q-5, what types of job training or education would be most helpful. (Please check all that apply.)

- Basic math and language skills.
- All of the above.
- Require Spanish people to learn English.
- Teacher's helper.
- Lodging industry.
- Teaching jobs.
- Telecommunications
- Alternative power
- Environmental Services
- Tech schools
- Have good job unsure about training opportunities
- Retail
- Parenting
- Better College
- Environmental Studies (This area provides a great lab).
- Need more college classes more affordable and more evening classes.
- Not aware of opportunities that are available.
- Chef
- Hospitality industry
- Environmental Studies
- No Child Left Behind Schooling
- Medical
- Insurance and Real Estate classes
- Good Teacher's training

Q-6. Please rate the current quality of the following services and amenities in Clatsop County.

- Reliable transportation to Portland City Center and Airport.
- Libraries – Disturbed that County/Cities charge each other – rather than support each other and the County as a whole.
- Too many Police.
- Very poor in Cannon Beach.
- Keeping traditional jobs – logging, fishing, etc.
- There needs to be more indoor choices for parents of pre-school-ers and children, winter weather is harsh. We need quality childcare at affordable prices.
- The arts.
- River walks.
- Police, fire, and emergency services.
- Star Gazing – Recently limited by too much Halogen lighting and development.
- Rental

Q-10. Please indicate what you think the Clatsop County government's policy should be towards economic growth.

- Environmentally sustainable industries (green industries)
- With concurrent quality of life
- Government should not interfere
- Should not have a Gas plant in Warrenton
- Environmentally friendly – sustainable growth that fits in with local area economy and directions of the County.
- Protect the little stores – they always stood by us.
- Not at the cost of quality of life here.
- Non-tourist economic growth is needed – no more “Trend Wests”.
- If they don’t sacrifice habitat protection for growth.
- Bring in more resources like Wal-Mart
- On what type of facility or product and if they pay a living wage for families.
- What type of economic growth

- Growth – environmentally safe new businesses and manufacturing
- Encourage manufacturing of products.
- Not damaging current industries or potential ones.
- On adequate infrastructure development, especially vehicle traffic management.
- I think that forestry and manufacturing need to cooperate and develop an industrial base.
- Labor for the young people.
- Logging without clear cutting should be encouraged.
- Encourage, but in appropriate locations – not strung out on transportation corridors.
- If it doesn't damage the environment.
- I'd love to see Eco-tourism enhanced.
- Support existing businesses, not recruit new ones.
- Not at expense of environment and with planning and adequate roads.
- No more low paying tourist jobs.
- On the type of development – it needs to be environmentally sensitive.

Q-11. Who do you feel should be working to promote economic development in Clatsop County?)

- Reducing tax burden then let local market dictate – no government programs for growth.
- Everyone who will benefit from it.
- Let the market work on its own – an idea that works fairly well but if our County has a major problem for many of its people a total effort is a good idea.
- Citizens – Salem government (State of Oregon).
- Community should be involved.
- Government combination with the help of a committee of local citizens. Volunteers not hand picked friends of government officials.
- Private citizen groups or committees.

- Clatsop Community College.
- Local offices of appropriate state agencies (e.g. Dept of Forestry, Extension Service).
- Special interest group within #3 (Check box: A combination of Clatsop County government, local city government, and local chambers of commerce.).
- State and Federal and Forest Industries.
- There is too much government.
- State government
- Port officials
- Everyone should work together to promote economic development.
- All – governments and private sector should work together.
- No government.
- Individuals

Q-13. If Clatsop County government was to try to recruit new business into the County, what types of business should the government work to recruit?

- Not sure.
- Increased Port facilities in Astoria to promote living wage jobs.
- I'd love to see ecotourism enhanced.
- Home Depot, Wal-Mart, for low income families.
- Manufacturing
- Shipping
- Recreation for kids.
- Local butchers/meat market.
- No CalPine or LNG.
- Shipping containers and cruise lines.
- Home Depot, Lowes, Krispy Kreme, WTEL, Car wash, furniture.
- Monthly promotion of activities.
- Technical training schools and businesses to use these new trades.

- Boat manufacturing
- Shipbuilding and shipping.
- Just a few grocery stores.
- Anything that would bring good paying jobs.
- Diversity
- The proposed Natural Gas facility is a must.
- LNG
- Wal-Mart with food center.
- Keep working with the movie industry.
- Strongly feel Port should be used in out economic growth.
- Good, healthy, affordable family eating establishments.
- Wind farms/Electric generation on Port property.
- State-wide better court system to deal with those causing problems. Many thieves are never prosecuted. Too many are free to cause more trouble.
- None
- Light industry
- Services which support tourist industry.
- Tourism and retirement destination.
- Wal-Mart and WinCo Foods.
- None
- Don't
- Clean industries
- Shipping (Rail, Boat, Plane via Astoria)
- Carpentry and Commercial Painting
- Apprenticeships and mill related trades and training.

Q-16. Do you think there are barriers to economic development in Clatsop County?

Less Focus on Environmental Quality

- Roads into area, govt policies on environmental issues that put nature before people (i.e. fish, birds, trees, -- losing jobs because of these protected things

- You put bird, animals, and stream waterways before people. Bring in industry and let the people who work there spend their money here. Not tax the businesses
- There's only so much room for new growth, without taking from the wildlife.
- Environmental groups -- local opposition
- Fear of environmental impact of development.
- Too much "Save the wetlands". How about save the economy and jobs.

More Focus on Environmental Quality

- Geography – i.e. mountains, ocean, wetlands, lack of a 101 bypass, need to maintain the pristine quality of the environment
- Geography – i.e. mountains, ocean, wetlands, lack of a 101 bypass, need to maintain the pristine quality of the environment
- We need to protect our natural resources -- still many opportunities

Government Attitude is Negative or Discourages Growth

- Non-progressive mentality by local government
- Non-progressive mentality by local government
- Leaders wanting to live in the past
- Astoria City govt -- too dictatorial too much under the table business -- Canon Beach lack of honesty
- Local government -- and the "I have mine group"
- Government officials
- Slow to make decisions -- "old philosophy" -- those who do not want change -- change comes to fast. "Dragging feet"
- No economic planning
- Too many radical environmentalists, lack of authority to grant tax breaks, etc by any one central agency (i.e. Port Authority being challenged by everyone over CalPine.
- Unsure except that local businesses seem to be strongly against it.
- County bias against small businesses

- Too many hard-heals that want things to stay as they are and won't see that fishing and timber jobs are gone -- can't survive on few months of tourism.
- Personality conflicts in governmental affairs in conflict.
- Clatsop County and city government are at odds with the citizens on absolutely everything. All you need to do is look at the schools, ODOT, (Seaside and Astoria), Safeway, Bypasses and etc. You can't get anyone to agree anything here unless it's free money. Museums do very well. We have a lot burger flippers and very little family wage. No cannery, no jobs. You got a long way to go.
- Planning Commission and inability to accept change.
- Too much government interference.
- The "Old boys" of local gov. that don't want change.
- Politics not letting in some businesses due to restrictions being too tight an hard to obtain.
- Narrow minded leaders who don't want to see change.
- Our local government not promoting and encouraging big businesses into the area.
- Forefathers have a definite problem accepting new businesses, even though local economy has gone down the toilet. They forget not everyone is wealthy that in fact most of us live day to day to payday. It's sad that the local hard workers don't have the final say.
- Not a lot of money in local government to help promote getting new businesses here.
- Environmental
- Clatsop County gov.

Negative Government Attitude About Growth

- People don't seem to want this area to grow
- Public Attitude
- Very vocal individuals who want no growth or industry , including the local newspaper (Daily Astorian)
- Some older people do not care about progress.
- "No can't do it. It's never been done before mentally" -- Narrowness of the County government.

- Baby Boomers who don't want to see anything change. It prohibits growth for the next generation
- Local populace refuses to allow expansion of economic base.
- The attitude of the locals who distrust progress, change and outsiders. Also the lack of major travel routes for trucking or railroad to carry products and reliable bus, air, and rail travel for tourism.
- Those who want to keep Clatsop County as it is.
- Some people believe that we live at the end of the earth.
- Attitudes
- Maybe, lack of proper perspective amongst some making decisions about economic development. I hear a lot of rumors around and about from local citizens who believe this is the case.
- Public opinion
- Some people who don't want growth in area.
- Local small business owners don't want other businesses in.
- The old die-hard establishments don't want new development - that's why our children grow up and move away. They say "it's a nice place to visit, but I wouldn't want to live there".
- To many people oppose change in our area. We need someone who could change their minds. Someone who lets them know the new is for them and the future of Clatsop County.
- There are many people like me who enjoys what we have. No interest in change unless real significant. To me changes is not always proper.
- Locals resist change, however I don't want big box retail here. I want to keep our unique architectural features, culture, and history.
- People don't want industry in same areas.
- Attitude of "old guard" toward change
- Fear of change

Land - High Cost or Lack of Availability

- Land too expensive and govt cost too high
- Infrastructure , inexpensive land and surfaces
- Land

- Land restriction
- Land availability
- Lack of land
- Land
- Affordable business space
- Developable land
- The cost of land for new building
- High cost of land/building
- Appropriate land for expansion

Lack of Good Port Facilities

- Remote location, poor reputation of State of Oregon as business friendly, hostility toward business shown by U of O students and faculty and Eugene anarchists, ecoterrorism in Columbia County and elsewhere in Pacific Northwest. Hostility of County population to "smokestack" industry, lack of railroad freight service and top-quality highways, unproductive, inactive port (shipping).
- Port facilities

Regulations

- Permit process take to long
- Planning process
- Coordinated planning and systematic identification and pursuit of desirable companies
- County Land Use and Planning Departments and Tax Incentives
- Nay Sayers; Those who "have theirs" and don't much care about others; strong spirit of contentiousness, endless paralyzing debate about almost every significant potential development or opportunity.
- Cumbersome permit process
- Obtaining licenses and other requirements through the County and State is a gruesome process. The rules are conflicting and the time factor obscene
- Building and Land Use ordinance/permit hassles, lack of Dept. communications between each other and public.

- Zoning, building codes
- Permitting process

Roads and Automotive Access

- Limited access to the area for cargo transport

Lack of Skilled Workers

- Skilled workers
- Lack of education
- Trained workforce
- An educated workforce is necessary and lacking. Assisting CCC to educate more at an affordable price is critical.
- Education level of workforce
- Uneducated labor pool, not enough qualified workers
- Education is still weak.
- Low educational attainment
- Work force
- Quality of workforce
- Lack of skilled workers in the area -- ex: computer/high-tech field
- Educated workforce
- Skills and training of local population
- Low education -- lack of incentives
- Untrained, undereducated available workforce; poor quality of life services for families.
- Unskilled workforce.

Transportation Issues

- Transportation into and out of area
- Transportation
- One is transportation: lack of bus, air, and rail services.
- Location and transportation system
- Lack of shipping/transportation to Portland which prevent Astoria from becoming a sea port.

- Lack of transportation
- Transportation
- Location -- distance from markets precludes commodities production -- rail line doesn't see to be commercially viable.
- rail infrastructure
- Transportation
- Too far from an airport -- transportation
- Rail/roads/airport
- Transportation
- Location related to access to high population centers
- Rail and air
- Transportation issues
- Isolation of community
- Transportation (roads, rail, air)
- Not located by a major airport
- Location/transportation
- Transportation infrastructure (roads)
- Road quality
- Lack of proper transport
- Shipping/transportation should include regular train service for freight and passengers, pipelines (which could go on Highway 30 right-of-way), and making highway 30 a four-lane divided all weather highway.
- Improve Astoria and Seaside airports and maintain regular service
- Portland is losing shipping due to various including Columbia River channel -- deepening the channel will not help that much. Astoria could become a sea port working with Portland to keep Oregon in the shipping business.
- Port of Portland competition with Port of Astoria and transportation infrastructure (e.g. rail freight); economic barriers to a certain extent (e.g. lower median income level than urban centers).

- Our location is isolated, River is good but Portland isn't going to give up anything.
- Lack of transportation infrastructure...poor highway system, no rail, no air and what seems to great resistance by some strangers of the community, save that it's their belly that getting scratched.
- No viable railroad
- Transportation
- We need a By-Pass! A local focus on a by-pass could promote our local area. By-pass! By-Pass! By-Pass!!! It is not conducive to a cozy comfortable place for tourists with log trucks and semi-trucks rattling through downtown Astoria. WE NEED A BY-PASS!!!
- Develop and refurbish Astoria train depot -- use it. It is a wonderful building. Would add so much to the area. Get a preservation group right on it.
-

Lack of Well Paying Jobs

- Certain groups are against any change that would create living wages.
- Lack of full time jobs -- I believe there are some people in Portland who would strongly object to a major port facility in Astoria.
- Lack of Living Wage jobs
- All of the "Big boys" want to keep out any development. All than is coming in is low paying jobs in the tourist trades (gift shops). People cannot support themselves or a family on these low wages.
- Low wages so good people don't stay, isolated from metro Portland
- Wages are too low

Desire for diverse economy

- Poor economic planning in the USA. Corporate dominate over small businesses.
- They need more stores like Wal-Mart, Bi-Mart, etc.
- Need to think out of box -- not the way things used to be
- Too much emphasis on tourism.

- Lack of viable industry
- Other than tourism and local Coast Guard and businesses there isn't really anything here for people to do to make more than minimum wage. Also -- do we really want to make Astoria into another Lincoln City area or S. California strip?
- Good shopping -- schools -- (No arts/ culture)
- Clatsop is a tourist Co. with a crowded, overpopulation during the summer and spring and, almost shutting down during the winter. In the Heavy, ocean-front towns in Clatsop Co., most prime areas are taken or otherwise unavailable.
- The idea that tourism is the answer -- it is not.
- Need to attract outside interest to build businesses in the County for growth.
- Too reliant on summer tourists. How about attracting conventions, meetings to this beautiful area all year around. It's nice here in the winter time too!! The entrance to downtown with it's empty buildings is a blight end is the first impressions of the City of Astoria, natural beauty of the surrounding landscape entering is fantastic. Then you see old empty store fronts.

Community Attitudes

- Many strong influential families who want to maintain village like atmosphere
- "Good old Boy" Core of power group managers most decisions which are planted to their own personal gain -- rather than the benefit of all citizens and for most part ignore the impact that decisions has on the population.
- Treat newcomers equally -- not charge them more because they're not local
- Mind set
- People are reluctant to change
- People -- like a Super Wal-Mart voted out so travel to Longview WA or Newport OR
- The "Good old boys"
- As strong resentment by local people for new people to come.
- Those who want no industry to move here.
- Nay Sayers (we don't want anything new people) The need for new people and new ideas in positions of a authority.

- Old boy network think only of money, not about quality of life.
- Good old boys society
- "Old school thinking"
- Laid back attitudes
- Long time attitude that customers will take what's here and won't go to Portland or use the internet -- However, this does seem to be changing.
- It's still in the good old boy network and they should get new blood from out of the area in these positions

Location

- Rural nature
- Remoteness
- Portland
- Proximity to I-5
- Sparse population
- Largely rural areas -- many retired people.
- Location -- 100 miles from metropolitan area.
- Location
- Location remote -- too far to markets.
- Perhaps distance from metro area.
- Climate, location
- Location
- Geography -- access to the area land

Other

Environmental

- Environmental
- Wetlands/ fill it in.
- Some of the private citizen's property not wanting businesses in their backyard; Ecology preservation of wetlands; wildlife pressures.
- Environmental quality, large growth concern
- Environmental quality, large growth concern

- Department of Environmental Quality

Taxes

- High taxes
- Tax
- High taxes, high construction costs, fees.
- Taxes, Historical Society
- Housing Issues
- Housing, too much protected land.
- Housing for young families -- single parents
- Housing
- Housing
- Affordable housing

Citizen Participation

- Enlistment of the county community (citizens) in development
- Residents should be more informed in detail about the facts (from a neutral source) whenever a new business make overtures to the County.

Government

- Powers that be are both unimaginative and knuckle dragger. They need to get out of the 1950's
- Lack of motivation by city council; lack of educating the community re:benefits
- Local government -- self satisfaction -- not willing to try other ideas.
- Local government -- self control. Not willing to try other ideas.

Other

- Space
- Most businesses and healthcare providers do not seem to have the resources to train their staffs in customer service. The result is a lack of professionalism. To be causal is one thing -- to not know what you are supposed to do is another.
- Fear. Lack of understanding of needs of working people
- Not enough promotion of area

- People attitude -- need to be educated
- Hard to get grants without a lot of trouble or the people trying for grants are not versed on what they need
- Old and the young
- Lack of internet connections
- I don't know
- I don't know
- Money
- Longshore Union -- they control the waterfront and drive away business.
- Our tax base is high now, citizens should not supplement any business.
- Our County, whether people realize it or not, is hurting socially because of economics.
- Limited resources are available , i.e. fishing and forestry
- Services and everything else it high
- Not sure
- Goods inland
- There is only so much availability. Would be nice to update and redo what we have. For instance we have the new Safeway, east end of Astoria. Go towards town needs to improve -- part of Astoria needs to be redone, but then you have a parking problem. Just like Seaside's parking problem in the summer. Maybe a better place for Saturday market.
- Don't know
- Do businesses encourage competition?
- We want it as it is now
- Employees who don't go out of their way to help
- Not enough money to go around to all agencies that need it to stimulate economic development -- need another way to bring in money like sales tax
- Finances
- The area doesn't attract nor keep educated people. The lack opportunity drives people away.

Q-29. Please share any additional comments that you about quality of life, growth, or economic development in Clatsop County.

- One of the things I love about Cannon Beach is that it is a planned city with a design review board. Attractive areas will attract good business and good people. I think it is important to establish values that include a healthy environment and an orderly, aesthetic sense of place.
- Medical is hard to get for assisted, we need more here to help the growth around instead of only seasonal work for the locals from Astoria to Cannon Beach!
- Bringing in new, tacky franchises fast food especially ruins the look of the area, and opportunity for small, privately owned stores to succeed. Clatsop Co. is beautiful – don't ruin it – fill existing buildings instead of building new ones. Rent is too high for small businesses, also for low-income year round residents. Healthcare for low income non existent, landlords not fulfilling obligations with no easy recourse for tenant, no jobs in the winter, wages low year round, too much development on Hwy. 101 in Gearheart (may be good thing but looks tacky)
- An eclectic area with acceptance of whom you are. Pristine and clean. Ideal area to live. Beauty forever changing. Please do not get over populated!
- Having lived most of my life in Charleston S.C. I can see so many parallels between the two. Balanced economic development with focused attention to quality of life issues resulted in Charleston's successful growth and development. I believe that the same is possible for Clatsop County. There are so many citizens who love this area both for what it is and what it can become tomorrow.
- Employment in the Tourist Business is Min Wage. We need a real industry base. Things are improving, as 10 years ago we had 1 Log Truck running a day & now we see up to 16 an hour. Need Lower Taxes and cheaper housing in area. Overpaid high taxes only support inefficient government workers.
- It's imperative that the quality of our life not be compromised by the wrong kind of development. We do not need or want outside corporations moving into the county to pollute and compromise our county in order to make a quick profit or to take advantage of our rural, low-density life style.
- Clatsop County is known for its beauty and this is what attracts people. Quality of life is important; however being a metropolitan area is not the answer. Construction has taken

over the area. We do need quality living wage jobs and diverse housing for all. In order to retain what attracts others to our county is a difficult balance, which must be retained.

- Oregon's shipping future requires Astoria to become a seaport working closely with the port of Portland. If money to improve Hwy. 30 is not currently available right-of-way could be acquired (brought) gradually with available funds. Call it long range planning. Astoria could become a boat/ship building/repair site. Clatsop Community College has good maritime & welding departments, which could be enlarged. Clatsop Community College should regain its electronics program as electronics is at the core of high tech. Clatsop Community College Computer programs should be enlarged. I have more to write than a single sitting will allow. Please supply me with e-mail address, surface mail address, & if possible toll free phone number. Thank You Fred K. Eldred, PO Box 205, Astoria, OR. 97103-0205 (< fredeldred@hotmail.com >) (503)325-1039 message phone. PS – I have been thinking about these things since my arrival in Clatsop County on Feb. 16, 1978. FKE
- We love Clatsop County!
- Go & grow forward- don't take one step forward, in whatever you do, and take two steps backward. Too bad there is such an abundance of wetlands around to stop development of housing, etc.
- The recent reaction to Calpine's proposal to locate a plant in Warrenton and the Port of Astoria's lease to Calpiner shows the absolute need of governmental bodies to enlist public comment and SUPPORT BEFORE a development, including a lease, is implemented.
- Your Jail should not be a pleasure place for them to read, body build and hang around. They should pay board and room some. How about working on something. Jail now is no big deal. It should be a big deal and cost them a lot. Boot Camp type living so when they get out, they do not want to go back.
- Keep the beauty – Turning Aegorhort into Beaverton by the Sea is not why we live here - & to develop willy-nilly defeats the purpose of this area – There needs to be a balance between growth and keeping a high degree of life – Quality.
- More services for old people.
- The city of Astoria needs a Trailer Park for visitors to park their travel trailers.

- I'm from Newport where there has been a LNG plant for years w/out problems – Let's get it here, fight for it. I like the small town of Astoria but taxes are astronomical – awful
- Increased business opportunities and Growth would provide additional jobs to local residents to foster a better economic climate. However Training and education would need to be available to prepare the workforce. Goods and services also must grow to meet the needs of an influx of businesses. Managed resources and services should stay proportionate to population in order to maintain quality of life in the community. I feel strongly that expansion is necessary but must be managed and balanced responsibly with public services.
- We need public transportation between Astoria and Portland. Bus service is very limited; too bad they took our ite railroad bridge. Portland to Seaside train would be a huge attraction plus an environmentally good means of transporting goods and people.
- New to Area still learning about the growth and economic development for this County.
- I hope you get some clear positive direction from this survey, and more importantly, make a multi-year strong commitment to act on it.
- We need to offer university level classes at the community college to prepare students who transfer to U of O or Portland State. Not enough intellectual stimulation for young people here. Encourage a private college to move here.
- Community needs more wholesome recreational activities. Such as dances and get togethers. When will the county have a conference center? We need to have use of a center not only to draw people to town but also as a public place for get togethers (like Cannon Beach). Also we need a “welcome” area for port ships that dock in town.
- I think the roads in the county are marginal. Businesses must be able to ship and receive goods quickly and affordably. There is no High Speed Rail in the Columbia River gorge to get products to the Portland web and east. Jobs here are mostly low pay-recreation jobs. I'd like to see higher paying manufactory and service jobs. There are no major corporate HQs in the area.
- Good services; 2. If I were a prospective businessperson or looking to expand a current business here, I would be put off by the endless, strident criticism and editorially biased reporting of the Daily Astorian. It injects constant anti-

business venom into the community.; 3. Clatsop Co. Gov't. needs to protect us from the extreme attitudes embodied in measures 34 and 37 and needs to hold the line as much as legally possible against 37.

- The concept of the county as being a business recruiter is one I have never considered in the terms used in this questionnaire. The county should be a facilitator of development by helping applicants through the maze of requirements. I see the county as an organization to serve residents with a court, sheriff dept., tax assessor/collector and planning to name a few. The economic development commission is an unclear entity but I perceive their duty as facilitators of growth and development. The county should not be doing the work of the chamber of commerce and business people.
- We need a larger variety of restaurants and discount clothing stores.
- I very much appreciate the quality of life in an incorporated city rather than the random development along strips of highway. Lets' not let care rot happen, I like a "square" town with sidewalks.
- Henry Wallace under FDR said, "Gravest thing we need to watch is over population." How many is over population, controlled development our estuary, control tourism. Too many DUI's Mr Paul Kearny (Sheriff) Helped DUI's home as county did not have funds to feed and jail. He worked for the people to keep them out of jail; limited the small jail funds. Police should walk the beat more and catch our youth cutting tires and keying vehicles.
- Careful planning should be encouraged. If you want to capitalize on tourism – then work at making the riverwalk a draw and other beautiful experiences. Industrial Opportunities should be kept outside and away from city congestion. We have serious problems in C.C. due to weather and alcoholism; need we bring more people here for unemployment and increased problems?
- I would like to see the port of Astoria used more for import and export purposes.
- It seems inevitable that tourism and retail are where the County is heading. To control that growth through cultural tourism seems more likely to protect the environment and the excellent life style of the area. Clatsop Community College should be a major player in the future economic development.
- The county relies too much on forest products to the detriment of tourism, fishing industry, water quality and quality of life.

We are not leaving enough old growth (none left) and health natural forests for the future generations. Sustainability must become important. Education should not be dependent on cutting forests.

- Rent is much higher than Long View there is not enough senior retirement homes. The hospital is very badly run in at least some departments & there are not enough choices in medical insurance.
- We're having the biggest Salmon runs passing our town. I'm pleased to see all the Salmon coming back. I'm wondering why we are just letting them all go to waste.
- We feel the trend west development was a horrible compromise for Seaside. It created low wage jobs and totally ruined what Seaside was about. Wealth people can take away the beach/view from the residents. In Seaside if you have enough money, you can take the view away from your neighbor by building behemoth 3 story homes that ruin the aesthetic of the entire neighborhood and ruin wetlands. We realize Seaside is a tourist town. The reason is the beautiful location. If rich folks buy up and build up all the oceanfront property and close it off to the public then what is left? Seaside needs family wage jobs that don't destroy the environment. The only family wage jobs are with the government or real estate developers. We need jobs, art, education, a McMenamins, and strong preservation of our natural beauty. We're proud Oregonians! We need larger libraries and a regional library system. We need to protect our Beaches for everyone!
- Q-17 "The County Should..." – All these are things the county "should" do, possibly, but funding isn't available to do everything. I don't think economic development / growth and environmental protection / quality of life are mutually exclusive.
- The downtown commercial / retail stores will not thrive and grow with the one-way streets. Too many travelers only see half of the merchants, possibly not seeing something that may have made them stop and get out to look; however, it may be located one street over going a direction they may choose not to follow.
- We are happy to see the refurbishing of old buildings and the construction projects in and around Astoria (partially spurred on by the upcoming Lewis and Clark celebrations) and, particularly, the new small businesses that have opened up in the last couple of years. Downtown Astoria would benefit enormously by forcing the harelts to relinquish their

destructive grip on their decaying old buildings and allow someone to restore those crumbling areas to useful productive properties. Is there any way the county can step in and help? Only time will tell.

- None of us want the traffic problems that come with big populated areas. Most of us retirees moved here with desire for a slow pace. Smaller city remains safer – we don't need muggings and dangerous living conditions
- Quality of life is far more important than Growth and Economic Development
- Quit giving jobs to Green Card toting Aliens. The Port of Astoria should be a gold mine for commerce Local Services such as medical need to be improved, sorry I don't have an obsession for this but I firmly believe 90% of residents would rather be transported to PDX than be treated locally for serious illness / injury.
- I'm very upset about what the County and Port of Astoria did with Calpine. We the voters didn't have any say about giving the land on the Skipanon away to Calpine and I mean give away. I'm going to fight this project to the end. I believe in economic development. But not that kind and not that way. We should have had a vote. If the majority wanted it I wouldn't have been quite as mad. Ask us what we want before you make all the decisions.
- In 1985 there was no such thing as a "rush hour" in Clatsop County. Now there is. It doesn't seem likely that the 0.6% population growth accounts for the increased traffic on the roads (& consequent road improvement projects \$\$) so where are all the people coming from? Quality of life has decreased since 1985. More people, fewer living wage jobs (on a percentage basis), and a higher cost of living (higher housing costs & food costs). It seems like the county is becoming just another rat colony where the developers develop what they want, where they want, how they want to the detriment of the environment and the population's mental health.
- We need more development downtown not just antique stores & the like. Some low priced clothing stores and that kind of thing, where you can spend some time with a friend. There really is nothing.
- If we can maintain and support our two biggest industries – Fishing and Tourism; we don't have to introduce other industries to our area. Many other industries would scar the landscape and hurt tourism.

- I am a Democrat so I am responding about the way George Bush runs the finances of the government. I am dependent of the Federal Government – Social Security and Veterans Pension – I look for cuts in my \$40,000 income shortly.
- I believe economic growth should be generated by the established industries in this area; (Lumber, fishing, & tourism). If a manufacturing base can be developed around these industries, the quality of life would be the least impacted. With the possibility that the value of the dollar may not maintain its pre-eminent value in the world manufacturing may again occur in the USA, inspite of the trade agreements that are currently limiting production in the USA.
- We find County staff friendly and customer oriented.
- Growth is fine as long as it is slow and doesn't destroy our beautiful area. The quality of life needs improvement for a lot of people in this area; jobs that pay a living wage. We don't need more shops or golf courses.
- It is time for some citizens of Clatsop County to pull their heads out of the sand. We have too few living wage jobs, thus a high % of the people living at or near poverty level. The City and county governments should do everything in their power to encourage industry that pays a living wage. In many ways the world has passed us by and that's not a good thing.
- We should have a transfer shipping from Astoria to Portland; also the gas docking and storage station in Warrenton is strongly encouraged. Keep our air quality clean.
- It is a wonderful to live in Clatsop County. I was born in Salem, Oregon, in the Willamette Valley. I have lived on the north Coast for 30 yrs. The closeness of our region to outdoor activities and close proximity to larger metropolitan communities are good here.
- Although it seems this survey addresses governmental services, I must state the need in our area for accurate local news reporting. The local newspaper needs competition. Editorial decisions eliminate critical opinions, which do not agree with the publisher. More free or affordable promotions for school and church and charitable organizations would promote a feeling of encouragement amongst the populace.
- Seaside had a huge timeshare resort open in the past year, which has significantly raised housing costs. This is going to become a serious problem that no one has realized they need to address. The value of our house went from \$150,000 to \$300,000 in two years! There are no good jobs in this town and

my husband and I can only afford to live here 'cause both of our incomes derive from outside the county. All the maids and dishwashers for Gearhart and Cannon Beach have to live in Seaside because of housing costs. Where will they go when rents start to spiral?

- Due to current Traffic Problems we do NOT need to encourage more tourism. We also need to better enforce vandalism and littering laws on tourists.
- I think that if there were more opportunities / programs that would provide job training, education counsel and/or start programs that kept petty criminals out of the jail, and gave them a way to better their life, plus helping others. (The need for more jails would be less.) Rehabilitation is more productive than incarceration
- I like the new changes that have been incorporated within the welfare system. I have recently had to take advantage of the program and was pleasantly surprised at the trend towards educating people more deeply and also the present understanding that people need time for change and need help and support during times of transition. Also, again I stress the need for more jail space in Clatsop County. However costs and practicality should determine how the space is developed. The county should be circumspect and consider all the options and educate us about them before deciding how to proceed. It needs to be done properly and reasonably. I say educate us so in case there is some local vote on it that we citizens vote understanding what we are choosing. We should be educated with honesty. I am a bit (A LOT – TRULY) frustrated with the political process everywhere. Often times I feel I am voting blindly about issues. How can I cast an educated vote without proper understanding? I write about this because I remember within the last few years voting about jail space. There is too much propaganda in politics everywhere. If rumors are true there are wrong and misguided attitudes amongst our decision makers concerning growth, (of course, maybe those propagating this idea are wrong and misguided! Everyone has got an opinion and how difficult it is to know the truth of the matter!) may they look within and honestly question their decision according to truth and proceed according to what is good and right. Thank you for an opportunity to give some of my insights! Hope it helps.
- Why did Wal-Mart get closed out? We need jobs and good shopping. This is crazy, A retired Realtor.
- Recreation, I don't drink, smoke or do drugs and there is very little to do for entertainment. Like dancing, as I don't like

alcohol and smoke I don't go to bars. Please give us some affordable clean fun.

- Tear down or clean up the older buildings. Have people be responsible to improve their buildings and area. Keep the area clean and neat. Make education a quality of life, having our schools offer a good trades training program. For kids that don't want to go to college.
- Astoria is a wonderful eclectic mix of people. It is on the verge of significant and dynamic changes, which brings opportunities and challenges. Astoria and the county had been economically depressed for at least 20 years '75 – '95. As a result a lot of infrastructure was not maintained, improved or built! This included transportation, water & sewer, utilities (phone), and more (hwy, rail, shipping, jail, college, schools, etc.). That means we now not only have to play catch up, but move forward at the same time. So, we are financially incapable of sustaining our future independent of outside sources. Money has to be pumped in to keep our community thriving. But how we maintain good land standards and manage growth is critical to our quality of life. We can't forsake the former to serve the latter. All community leaders must share the responsibility of Clatsop's economic growth and livability. Our community faces a serious drug & alcohol problem that gone ignored or overlooked for 40 years! It is the cause of high property crime, burglaries and more. Our leaders need to get the community involved at all levels to get this problem under control. We have too many low-income wages and housing for a community our size. We need to educate our workers to maintain jobs and get off welfare and unemployment roles. We have plenty of land set aside for industrial use & we have plenty of empty buildings that can be used for new business. Let's explore all options (except bringing in Wal-Mart!); look at all sides and make decisions for the good of the community, environment and future operations. P.S. About the jail ??? Not sure we need to spend \$22 million on a new facility. Can we explore using an existing building, like the Spexarth Bldg. I'd rather see us figure out how to stop drugs from coming into the county and educate the community first, and at the same time look at economically viable options for incarceration. Thank You!
- I live in a really expensive town most of the people that live here full-time don't make very much money. It is so important that local governments remember that. Childcare is #1 with me. IN Cannon Beach we must maintain the non-profit Cannon Beach Children's Center. It can only be done with continued Support of the local government. Housing is another issue. It is nearly impossible for the average working family to

purchase a home here. I believe there is a drug problem in many parts of Clatsop County that needs to be addressed too.

- The county is in traffic gridlocks. Time to renew efforts to bett bypass through Astoria and replace Hwy. 30.
- The administration of Clatsop County government is very poor. There is little or no accountability. Each department is run as a fiefdom. There is much dissatisfaction because of misuse of public funds. When questions are raised about waste, fraud and abuse in county government, the public officials are unresponsive and hide behind their authority. The county does not need economic development. It needs better administration and accountability. It needs to use the monies it has better by reordering its priorities and instituting a system of accountability. For example, instead of dealing with citizen's complaints about its services and personnel in a straightforward manner, the county hired a public relations officer. That money would have been better spent if the county had appointed an ombudsman.
- The education of the work force is not good.
- I understand that the property taxes in Astoria are at the top of Oregon Cities. Fixed or low-income families cannot afford to stay in their homes. City and county officials keep adding to our tax burden. We cannot afford a new jail, college, or any other tax increasing projects.
- We live in a place of great beauty and should always remember this and not compromise it in the name of economic development. One paper mill is enough in this county!
- There is not enough help for the older people so improve job availability or improve hourly wage to build up a livable retirement income!!!
- There is too much emphasis on tourism – we have enough! Tourism inflates costs of housing, foods, etc. for all; while creating mostly minimum wage jobs.
- From years of being in business and serving on many committees I can appreciate the need for more information. I have a little different attitude than many in that even though I am a goal setter, I can enjoy, appreciate, and be very thankful for what most folks take for granted. I look for the good and find a lot of it. I do not have problems because I do not look for them. Attitude makes peace of mind, or misery. My opinion of Clatsop County is that I have lived exactly where I wanted (moved here in '60), and I worked at exactly what I wanted to do. What more do I want?? I may not have helped with the committee's expectation of this survey, as I am

very happy every day. Time will come when that may not be true, yet I hope I will continue to be thankful for what I have had and not be selfish for even more.

- In Response to the Jail Construction consider savings by expanding current facility, i.e. Infrastructure, already in place, no expense to transport to court house, reduced liability, less hiring expense, no need to purchase and maintain transport vehicles and less likelihood of escape. Instead of constructing a golf course on Port property (I'm not aware of a shortage of golf courses around here) why not a wind farm? That is something of benefit to all, & gets used all year regardless of weather, provides good paying employment and good transferable job skills, training for which, for the most part, can be obtained at the community college. The LNG Farm sounds interesting if safety and environmental issues can be addressed...Hopefully the county will miss this opportunity to miss an opportunity. What happened to my DUCKS?? Next year!!
- Daily transportation or shuttle service to and from PDX / Vancouver would allow people to live here work elsewhere. Amtrak, Light rail, plane – we need more than one time. Better local bus transportation. Different amounts for different parts of the county are not economically fair. Better communication of services.

Appendix C

Business Survey Methodology and Survey Instrument

This appendix contains a copy of the survey instrument for the Clatsop County Business Economic Development survey. The survey was administered in November and December 2004. Following is a discussion of the survey methodology.

The Business survey focused on: (1) business climate; (2) perception about the Clatsop County government and economic development; (3) potential economic development policies; (4) plans for business expansion in the next five years; and (5) respondent demographics.

CPW administered the survey by mail to 1,200 businesses in Clatsop County. The sample was drawn from the Employment Security 202 database provided by the Oregon Employment Department. This database includes records for all businesses with employees that are covered by unemployment insurance. This database allowed the survey to be randomly distributed to a broad range of business types and size.

The survey was addressed to "business manager" and sent out twice. The second survey was mailed about two weeks after the first mailing of the survey. CPW received 183 valid responses, 314 undeliverable surveys. The response rate was 20.7%.

November 2004

Dear Business Manager,

We need your help!

Clatsop County is in the process of developing an economic development strategy.

Clatsop County is asking local businesses their opinions and attitudes about potential economic development strategies that the County is considering. The Community Planning Workshop at the University of Oregon is conducting the survey on behalf of Clatsop County. We encourage you to complete the enclosed survey of your opinions about Clatsop County as a place to do business.

This survey will be an integral piece in understanding Clatsop County as a place to do business. The more responses we receive from business owners like you, the better informed we will be to address key issues with respect to our local economy. All responses will be kept confidential. The results of this survey will be used to review economic development strategies.

Your opinions are important to us. Please return your completed survey no later than Wednesday, November 24th, 2004 in the enclosed postage paid envelope. If you have any questions regarding the survey, please feel free to contact Beth Goodman, Community Planning Workshop Project Manager at 541-346-3653.

Thank you for your participation!

Sincerely,



Bob Parker
Director
Community Planning Workshop

CLATSOP COUNTY

ECONOMIC DEVELOPMENT SURVEY

Instructions: Clatsop County government wants to better understand the attitudes and issues related to economic development for businesses in the County. Consequently, this survey has been sent to 1,200 local business representatives throughout the community. The County is working with the Community Planning Workshop at the University of Oregon to administer the survey. Clatsop County will use the results of this survey to review its economic development policies.

This survey is intended to reflect the opinions of local business leaders. The person who makes primary business decisions at your business should complete the survey. You should complete the survey based on your individual opinions and experiences in conducting business in Clatsop County. Please read each question carefully and answer to the best of your ability. Return your completed survey in the enclosed postage-paid envelope by **Friday, December 10th, 2004**. Thank you for your time!

Note: Your participation is voluntary and your returned survey indicates your willingness to take part in the study. If you have questions regarding your rights as a research participant, please contact the Office of Human Subjects Compliance, University of Oregon, 5219, Eugene, OR 97403, or call (541) 346-2510.

First, we would like to ask some questions about your perceptions of the business climate in Clatsop County:

Q-1. Overall, how would you rate Clatsop County as a place to do business at this time?

- Excellent
- Good
- Fair
- Poor

Q-2. How has Clatsop County changed as a place to conduct business from five years ago (or since you began conducting business in the County)?

- Better
- Worse
- Unchanged
- Not sure
- Both better and worse

Q-3. Is Clatsop County economically better off than it was five years ago?

- Yes, Why? _____
- No, Why? _____
- About the same
- Not sure

Q-4. The following is a list of characteristics that can affect views of the local business climate. Please rate these characteristics in terms of their effect on Clatsop County as a place to do business.

Characteristic	Affect					
	Very Positive	Somewhat Positive	Neutral	Somewhat Negative	Very Negative	Not Sure
1. Access to markets and customers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Affordable housing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. Availability of capital	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. Availability of land	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. Availability of raw materials	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. Availability of technology	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7. Community attitudes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8. Community safety	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9. Competitive pressure from other businesses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10. Cost of doing business	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11. Cost of living	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
12. Parking	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
13. Diverse economic base	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
14. Economic growth potential	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
15. Environmental quality	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
16. Growth management policies	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
17. Infrastructure	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
18. Local government regulations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
19. Local tax policies	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
20. Medical facilities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
21. Permitting requirements	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
22. Population density	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
23. Public education system	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
24. Quality of life	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
25. Recreation opportunities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
26. Shopping facilities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
27. State's fiscal situation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
28. State and Federal regulations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
29. State and Federal tax policies	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
30. Sustainability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
31. Traffic Congestion	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
32. Transportation system	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
33. Utilities cost	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
34. Vital downtown	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
35. Workforce availability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
36. Workforce quality	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
37. Other (specify): _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Q-5. Using the list of characteristics presented in Q-4 or other characteristics, please indicate the top three strengths and weaknesses of doing business in Clatsop County.

Strengths	Weaknesses
1.	1.
2.	2.
3.	3.

Next, we would like to ask some questions regarding your opinions about Clatsop County government and economic development:

Q-6. Please indicate how supportive the Clatsop County government is to local businesses.

- Very supportive
- Somewhat supportive
- Neither supportive nor unsupportive
- Somewhat unsupportive
- Very unsupportive

Q-7. Please list the top three steps the Clatsop County government could take to improve the county as a place to do business.

- 1. _____
- 2. _____
- 3. _____

Q-8. What are the three things that make Clatsop County *most* attractive to employers? (Please check all that apply)

- | | |
|--|---|
| <input type="checkbox"/> Availability of raw materials | <input type="checkbox"/> Well trained labor force |
| <input type="checkbox"/> Tax structure | <input type="checkbox"/> Transportation system |
| <input type="checkbox"/> Availability of technology | <input type="checkbox"/> Tax structure |
| <input type="checkbox"/> Access to shipping | <input type="checkbox"/> County government |
| <input type="checkbox"/> Availability of land | <input type="checkbox"/> Quality of life |
| <input type="checkbox"/> Labor pool | <input type="checkbox"/> Permitting process |
| <input type="checkbox"/> Educational system | <input type="checkbox"/> Natural environment |
| <input type="checkbox"/> Housing availability | <input type="checkbox"/> Business clusters |
| <input type="checkbox"/> Access to medical care | |

Q-9. What are the three things that make Clatsop County *least* attractive to employers?
(Please check all that apply)

- | | |
|--|---|
| <input type="checkbox"/> Availability of raw materials | <input type="checkbox"/> Well trained labor force |
| <input type="checkbox"/> Tax structure | <input type="checkbox"/> Transportation system |
| <input type="checkbox"/> Availability of technology | <input type="checkbox"/> Tax structure |
| <input type="checkbox"/> Access to shipping | <input type="checkbox"/> County government |
| <input type="checkbox"/> Availability of land | <input type="checkbox"/> Quality of life |
| <input type="checkbox"/> Labor pool | <input type="checkbox"/> Permitting process |
| <input type="checkbox"/> Educational system | <input type="checkbox"/> Natural environment |
| <input type="checkbox"/> Housing availability | <input type="checkbox"/> Business clusters |
| <input type="checkbox"/> Access to medical care | |

Next, we would like to ask you some questions about economic development policies:

Q-10. Please indicate what you think the Clatsop County government's policy should be towards economic growth.

- Encourage economic growth
- Accommodate/manage economic growth
- Discourage economic growth
- Not sure
- It depends (explain): _____
- Encourage economic growth/It depends
- Accommodate/manage economic growth/It depends

Q-11. Who do you feel should be working to promote economic development in Clatsop County?
(Please check all that apply)

- Clatsop County government
- Local city governments
- Local chambers of commerce
- A combination of Clatsop County government, local city government, and local chambers of commerce
- No one – let the market work on its own
- Not sure
- Others (please specify): _____

Q-12. Do you think there are barriers to economic development in Clatsop County?

- No
- Yes → What are they? _____

Q-13. Please check the box that best represents your opinion regarding what Clatsop County government should do as local economic development policies and strategies.

Statement	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree	Not Sure
The County should actively recruit businesses.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The County should reduce development fees.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The County should have more industrial lands available for development.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The County should have strong policies to maintain environmental quality.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The County should streamline the development permitting process.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The County should provide financial incentives to attract new employment.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The County should provide financial incentives, such as tax breaks, waivers, loans, or grants, to businesses currently located in the County business growth.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The County should adopt policies that will create more affordable housing for workers.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The County should take steps to retain and expand existing businesses.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The County should provide assistance to businesses facing financial difficulty.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The County should provide employee recruitment services to businesses.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The County should provide employee-training opportunities.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The County should engage in public/private partnerships with businesses.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The County should market itself to new businesses.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The County should represent local firms at trade shows.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The County should assist businesses in identifying new markets.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Q-14. Please evaluate each policy or process in terms of its impact on Clatsop County as a place to do business.

Local Policies and Processes	Positive	Neutral	Negative	Not Sure
Building permits	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Infrastructure development (i.e. roads, airport, sewer)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Land use application	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Land use code	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Local tax policies	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Utility system development charges	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other: _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Now, we would like to ask you some questions about your plans for growth or expansion of your business:

Q-15. Do you plan to expand your business in the next *five* years?

- Yes
- No (**skip to Q-20**)

Q-16. If you plan to expand your business in the next five years, will you expand it in Clatsop County?

- Yes
- No

Q-17. Please indicate the number of new employees needed for business expansion in the next five years?

_____ (full time equivalent)

Q-18. Please indicate the additional land area needed for business expansion in the next five years?

_____ (acres)

Q-19. Please indicate the additional floor area needed for business expansion in the next five years?

_____ (sq ft)

Q-20. What areas of assistance are most needed to help your business grow and succeed?
(Please check all that apply)

- | | |
|--|--|
| <input type="checkbox"/> Availability of capital | <input type="checkbox"/> Networking groups/business clusters |
| <input type="checkbox"/> Communications infrastructure | <input type="checkbox"/> Provide affordable housing |
| <input type="checkbox"/> Cut/lower taxes | <input type="checkbox"/> Reduce health care costs |
| <input type="checkbox"/> Employee education and training | <input type="checkbox"/> Reduce regulations & fees |
| <input type="checkbox"/> Employee recruitment | <input type="checkbox"/> Streamline permitting processes |
| <input type="checkbox"/> Employee retention | <input type="checkbox"/> Wage issues/overtime issues |
| <input type="checkbox"/> Financial support | <input type="checkbox"/> No assistance needed |
| <input type="checkbox"/> Improve transportation infrastructure | <input type="checkbox"/> Not sure |
| <input type="checkbox"/> Increase land availability | <input type="checkbox"/> Other |
| <input type="checkbox"/> Information about available resources | |
| <input type="checkbox"/> Information on local market characteristics | |

Finally, we would like to ask some questions about the characteristics of your business:

Q-21. What is your zip code. _____

Q-22. Is your company based in Clatsop County?

- Yes
- No

Q-23. How long has your company been operating in Clatsop County?
_____ years

Q-24. How many full and part-time employees are currently employed by your business?

Part-time employees: _____

Full-time employees: _____

Q-25. Please indicate the type of industry or profession that most accurately describes your business. (Please check only one.)

- | | |
|---|---|
| <input type="checkbox"/> Agriculture, Forestry, Fishing | <input type="checkbox"/> Transportation, Communication, Utilities |
| <input type="checkbox"/> Construction | <input type="checkbox"/> Finance, Insurance, Real Estate |
| <input type="checkbox"/> Business Services | <input type="checkbox"/> Health Services |
| <input type="checkbox"/> Food Processing | <input type="checkbox"/> Wood Products Manufacturing |
| <input type="checkbox"/> Lodging | <input type="checkbox"/> Retail Trade |
| <input type="checkbox"/> High-tech | <input type="checkbox"/> Education or Training |
| <input type="checkbox"/> Eating/Drinking Establishment | <input type="checkbox"/> Wholesale Trade |
| <input type="checkbox"/> Other Services | <input type="checkbox"/> Other Manufacturing |
| <input type="checkbox"/> Other (please specify): _____ | |

Q-26. Please indicate your gross revenues for the most recent complete fiscal year.

- | | |
|--|---|
| <input type="checkbox"/> Under \$500,000 | <input type="checkbox"/> \$5 million - \$10 million |
| <input type="checkbox"/> \$500,000 - \$1 million | <input type="checkbox"/> Over \$ 10 million |
| <input type="checkbox"/> \$1 million - \$5 million | <input type="checkbox"/> Don't know |

Q-27. Please share any other comments you have in the space below.

ALL RESPONSES WILL BE KEPT CONFIDENTIAL
Thank you for completing Clatsop County's Business Survey!

Appendix D

Open-ended Questions from the Business Survey

This Appendix presents the written comments from the open-ended questions from the Business survey. On some questions, we have categorized the comments according to theme.

Q-3. Is Clatsop County economically better off than it was five years ago?

Comments from answers of "Yes"

Good Economy

- Growth in business sector
- I think so but have no facts
- Development=business=jobs
- More business, more vision
- More economic (/) (14)
- More businesses in the area and better access
- More selections of services and restaurants
- More employment

Poor Economy

- Less Jobs
- New developments, housing, retail, etc.

Positive Attitude towards Growth

- Attitudes are leaning toward growth
- Tourism
- Tourism (Lewis and Clark)
- We seen an increase in new businesses
- Many new businesses in the county
- New development, sense of moving forward
- Influx of tourists

- New businesses and people coming to area
- Hope and change CofC activity
- Introduction of trend west, Lewis and Clark, more short (/)
(21)
- Further expansion
- A lot of construction activity
- More development
- It appears that there are more tourists; Sunday market in Astoria and the addition of many cruise ship arrivals
- More vitality, many changes in positive direction
- New business, business expansion, general growth of exposure for county
- Population growth and business
- More building, strong tourism
- More business, more stable employment
- More growth not dependent on timber alone or on fishing

Lewis and Clark Celebration

- Money coming into area for Lewis and Clark
- Lewis and Clark expedition publicity

Increase in public investment

- Outside investment, urban renewal in Astoria, Lewis and Clark Celebration
- New buildings, renovations
- More hotel rooms, better restaurants, spruces up cities
- Entrepreneur investment
- Increased investment in infrastructure and private enterprise
- More investments have been made

Increase in tourism

- Tourism, cruise ships, L+C explore train
- Tourism
- Accent on tourism

- Tourism destination
- New businesses resulting in new tourists
- Tourism
- Tourism, new developments
- More visitors
- Because of tourists
- Tourism has increased everyone to offset lack of other industry
- Tourism increase
- Focus has been more on visitors and less on resource extraction
- Cruise ships, larger tourist population
- Increased tourism and increase development

Well paying jobs

- Attracting more professionals, entrepreneurs and people working out of their homes

Other

- Since there are no real jobs the people that move here usually already have money
- Increased interest in the area, revitalization of commercial areas
- More business minded, opening up to change
- Fish and timber market are avail more
- Retirement people and their money
- Second home buyers
- Ocean condition, sport and community
- More out-of-town interest and investment

Comments from answers of "No"

Poor economy

- Depressed
- Bad economy, competition of same types of businesses city has no \$ it seems

- No industry, no jobs, low wages
- More poverty, drugs, crime, poor
- Loss \$ from timber revenue
- Costs for government up lot more than economy up

Growth

- Lack of consumer confidence/traveling since 9/11
- More retired = more resistance to development
- Loss of jobs, youth authority and state police. No new jobs created

Need to improve natural resource availability

- Timber and fishing down
- Fishing and logging restrictions
- No fishing, no lumber, no industry, no new jobs

Public investment

- State funds to counties are less

Too much regulation

- Environmental restrictions
- Government regulations, restrictions — public art, business attitude
- Tightening regulations
- More restrictions have been placed on fishing, forestry, and land use
- Fishing and timber restrictions
- Government regulations, fees, taxes
- City planning and development in some areas (Warrenton) is poor and inexperienced
- Too many land use restrictions

Increase in tourism

- We have gone from a resource based economy creating wealth and with good paying jobs to a service based (tourist) economy that is close to min wage levels. Our demographics are changing as a result. We have a large “art community” also and typically they oppose industrial development

- Transition to service (tourism) many of my customers are experiencing shorter seasons and fulltime employment
- Industry based on tourism is subject to economic downturns
- Summer business has been slower
- Fewer tourists coming, those that do spend less
- Tourist based business area

Lack of well-paying jobs

- Loss of living wage jobs, i.e. man., logging, fishing
- They have only come up with service jobs no higher paying work than min wage
- Too much minimum wage employment
- Family wage jobs have been displaced by part-time minimum wage jobs
- Continued trend of fewer family wage jobs
- Fewer family wage jobs, cannot survive on tourism
- Lack of jobs, not as many conventions
- Unemployment
- Low incomes
- Lack of family wage jobs, lack of development
- No growth of family wage jobs
- No new family wage jobs
- No wage earning jobs for families

Other

- Less jobs
- Merchants spending less money on advertising
- Can't seem what direction to take
- Downturn in Oregon economy is felt here
- High unemployment/low wage jobs
- Drugs/alcoholism are up, services are down, tourism is down
- No new industry
- Need more small business not large

- No development
- Still loosing natural resource based jobs, less local ownership of large employers
- Negative in the North, positive in the South

Q-4. The following is a list of characteristics that can affect views of the local business climate. Please rate these characteristics in terms of their effect on Clatsop County as a place to do business.

- Very negative
- Drug and alcohol problems
- Land use
- Drug problems throughout the county and the related problems
- Drug/alcohol activity

Q-5. Using the list of characteristics presented in Q-4 or other characteristics, please indicate the top three strengths and weaknesses of doing business in Clatsop County.

Strengths

Access to markets and customers

Access to customers	Access to markets and customers
Access to markets	Access to markets and customers
Access to markets and cost	Access to markets and customers

Affordable housing

Affordability	Affordable housing
Affordable housing	Affordable housing
Affordable housing	Housing
Low cost of living	

Availability of capital

Availability of capital	Availability of capital
Availability of capital	Availability of capital
Availability of capital	New capital is coming now

Availability of land

Ability to expand if no regulation	Availability of land
Avail land	Available land
Availability of land	Available land for developments
Availability of land	Land availability

Availability of raw materials

Availability of raw marterials	Raw materials
--------------------------------	---------------

Availability to natural resources Raw materials
Close to fish Raw materials

Availability of technology

Availability of technology Available technology

Community attitudes

Community attitude Community attitudes
Community attitude Community attitudes
Community attitude Community attitudes
Community attitude/safety Community attitudes
Community attitudes Community attitudes
Community attitudes Desire to grow well
Community attitudes Positive attitude (S. County)
Community attitudes Positive image

Community safety

Community safety Community safety
Community safety Community safety
Community safety Community safety
Community safety Community safety
Community safety Community safety
Community safety Community safety/attitudes
Community safety Less crime
Safety Police and fire protection

Competitive pressure from other businesses

Competitive pressure No competition (limited)
Competitive pressure

Cost of doing business

Cost of business Cost of doing business
Cost of business Cost of doing business

Cost of living

Cost of living Cost of living
Cost of living Cost of living
Cost of living Cost of living
Cost of living Cost of living
Low cost of living

Parking

Parking Parking

Diverse economic base

Diverse economic base Good support of industries
Diverse economic base

Economic growth potential

Econ. Growth potential	Economic growth potential
Economic growth (S. County)	Economic growth potential
Economic growth potential	Economic potential
Economic growth potential	Economic potential
Economic growth potential	Economic potential
Economic growth potential	Good people/diverse interests
Economic growth potential	Good potential
Economic growth potential	Growth
Economic growth potential	Growth potential
Economic growth potential	Growth potential
Economic growth potential	Growth potential
Economic growth potential	Growth potential
Economic growth potential	Growth potential
Economic growth potential	High % of seafood (/) (8) in port
Economic growth potential	Lots of opportunity
Potential for growth	Potential

Environmental quality

Beautiful area	Environmental quality
Beautiful place to be	Environmental quality
Beauty natural	Environmental quality
Better environment to live	Environmental quality
Clean environment	Environmental quality
Environment	Environmental quality
Environment	Environmental quality
Environmental qualities	Environmental quality
Environmental quality	Environmental quality
Environmental quality	Environmental quality
Environmental quality	Environmental quality
Environmental quality	Environmental quality
Environmental quality	Environmental quality (natural)
Environmental quality	Environmental quality of life
Environmental quality	Great place to develop for all its environment
Environmental quality	Natural and scenic beauty
Environmental quality	Natural beauty
Environmental quality	Natural beauty/beaches/open spaces
Environmental quality	Open natural spaces
Environmental quality	Scenic draw
Wonderful environment	Scenic location, unique

Growth management policies

Growth management	Growth potential
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Growth management policies

Infrastructure

Infrastructure

Local tax policies

Local tax policies

No tax

Medical facilities

Health Care

Medical facilities

Medical facilities

Medical facilities

Medical facilities

Population density

Pop. Density

Population density

Population density

Population density

Population density

Population density

Population density

Population increasing

Public education system

Clatsop Community College

Public education system

Good public education

Public education system

Great schools

Public education system

Local college

Public education system

Public education

Schools

Quality of life

Beautiful area in which to live and work, quality of life

Quality of life

Environmental quality

Quality of life

Environmental quality

Quality of life

Environmental quality

Quality of life

Environmental quality

Quality of life

Good place to live

Quality of life

Livability

Quality of life

Livability

Quality of life

Quality of life

Quality of life

Quality of life

Quality of life

Quality of life

Quality of life

Quality of life

Quality of life

Quality of life

Quality of life

Quality of life

Quality of life

Quality of life

Quality of life

Quality of life

Quality of life

Quality of life

Quality of life

Quality of life

Quality of life

Recreation opportunities	Recreational opportunities
Recreation opportunities	Recreational opportunities
Recreation opportunities	Recreational opportunities
Recreation opportunities	Recreational opportunities
Recreation opportunities	Recreational opportunities
Recreation opportunities	Recreational opportunities
Recreation opportunities	Recreational opportunities
Recreation opportunities	Recreational opportunities
Recreational opportunities	Recreational opportunities
Recreational/historic opportunities	Recreational opportunities

Shopping facilities

Shopping facilities

Traffic Congestion

Low traffic	Traffic congestion
Traffic	Traffic congestion
Traffic	

Transportation system

County and port entities vision	Transportation system
Good transportation	Transportation system
Transportation	

Utilities cost

Utilities cost

Vital downtown

Vital chamber and community	Vital downtown
Vital downtown	Vital downtown
Vital downtown	Vital downtown (improving)
Vital downtown	Vital downtown, Cannon Beach
Vital downtown	

Workforce availability

Available work force	Workforce availability
Lrg untapped labor force	Workforce availability
People eager to work	Workforce available

Workforce quality

Workforce with ethic	Workforce quality
Education	Workforce quality and availability
Many people need more work, more than minimum wage	

Other

Emphasis on historic preservation	Great restaurants
Plays with historic value	Unique coffee shops

Growth potential	Inexpensive
Increasing economic vitality	Livability
Large to new construction	Uncongested
Room for growth	Local govt support
Pacific Ocean	Location
Beautiful area	Low competition
Fresh air	Good health care available
Weather	Good lighting uptown
River	Good schools thru junior college/good medical access
Large tourist population	People looking for value
Little competition	Plenty of parking
Strong chamber/tourist promotion	People work together (S. County)
Tourism	Familiar with local agencies
Tourism related activity	Knowing your clients
Tourism summer strength	Unknown
Large percent part time homeowners	

Weaknesses

Access to markets and customers

Access to markets	Access to markets
Access to markets/customers	Access to markets and customers
Distance from large city	Access to markets and customers
Access	Distance to market and shipping
Far off I-5 corridor	Access to markets
Access to customers/market	Access to shipping

Affordable housing

Affordable housing	Cost of housing
Available housing	Affordable housing
Affordable housing	Affordable housing
Affordable housing	Affordable housing
Housing	Affordable housing
Limited housing	Permitting requirements
Affordable housing	Affordable housing
Affordable housing	

Availability of capital

Availability of capital	Availability of capital
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Availability of land

Availability of land	Availability of land/Infrastructure
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Availability of land	Avail. Of land
Limited land	Available of land
No land for new buildings	Availability of land
Availability of land	

Availability of raw materials

Varying available raw products	Access to supplier
Raw materials	Availability of raw materials

Availability of technology

Availability of technology	Technology
Availability to technology	Technology
Limited technology	Avail. Of technology
Availability of technology	Availability of technology
Availability of technology	Availability of land

Community attitudes

Community attitudes	Community attitudes
Closed door attitude	Community attitude
Negative attitudes toward industry	Community attitudes
Anti manufacturing attitude of county and cities	No reason for high school grads to stay
Ambivalence of community	Negative attitudes
Community attitudes	Attitudes
Community attitudes	Community attitudes

Community safety

Community safety

Competitive pressure from other businesses

Not enough computer business

Cost of doing business

Cost of doing business	Cost of doing business
Cost of doing business	Cost of doing business
Cost of doing business	Simplify permit process
Cost of doing business	Simplify local regulations
Increased costs E.G. insurance	Cost of doing business
Cost of doing business	Cost of doing business

Cost of living

Cost of living	Cost of living
Cost of living	Cost of living
Cost of living	Cost of living, Cannon Beach
Cost of living	

Parking

Parking if doing business in Astoria Parking

Parking	Parking
Parking	Parking
Parking	Parking downtown
Parking	Parking
Parking	Parking
Parking	Parking
Parking	Parking
Parking	Parking

Diverse economic base

Diverse economic base	Diverse economy
Poor economy	Diverse economic base
Lack of economic base	Diverse economic base
Diverse economic base	Diverse economic base
No industry or jobs, most float part into Portland	Diverse economic base
Low diversity in eon base	Diverse economic base
Economic base	Diverse economy
Diverse economic base	Diverse economic base
Eliminate the hidden taxes (franchise taxes, etc.)	No industry

Economic growth potential

Lack of growth	Economic growth potential
Economic growth	Limited knowledge to proceed economic development
Economic growth potential	Stagnate economy

Growth management policies

Growth management policies	Struggle between growth and environment is harmful
Development control	Growth management policies
Growth management	

Infrastructure

Infrastructure	Infrastructure
Infrastructure	Weak infrastructure
Infrastructure/transportation	Infrastructure
Infrastructure	Infrastructure

Local government regulations

Regs. on business	Government regulations
Local gov regulations	Gov't regulations
Local govt regs	Too many land regulations
Local govt regulations	Local government (good old boy)
Unhelpful local govts, especially	Gov't regulations

Astoria	
Land use	Local government regulations
Local regulations (too many)	Regulation
Government regulations	Regulation
Local government regulations	Government policies favoring preservation
Local government regulations	Local governmental regulations
Dealing with county regulations and lack of county to enforce them	Government regulations
Local gov. regulations	Government regulations
Too many regulations	Local government regulations
Land use	Local government regulations

Local tax policies

Local taxes	Local tax policies
Taxes	Tax policy
Local tax policies	Property taxes
Local tax policies	Taxes
High taxes	Tax high no asessed value (N. County)
Tax policies	Local tax policies
Taxes	Tax policies

Medical facilities

Trained work staff-medical professionals	Medical care/Insurance costs
Medical facilities	No good medical facilities
Lack of urgent care medical facility	Medical facilities
Health care providers	Limited medical facilities

Permitting requirements

Permitting/inspections	Permit requirements
Getting permits	County is a permitting nightmare
Permitting requirements	Building permit process in Warrenton appalling
Permit process	Permit requirements
Arduous permit process	Permitting requirements
Permitting requirements	Permitting requirements
Permitting requirements	Permitting requirements
Permitting requirements	Permitting requirements
Permitting process	Permit requirements
Permitting	Permit and fee process
Permitting requirements	Permitting

Population density

Population density	Limited population
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Population density

Public education system

Higher educational opportunities	Public education
Public education system	Public education
Public education system	Public education
Education	Public schools Astoria
Poor educational system	Education system 1-12
Uneducated leaders and uneducated voters	

Recreation opportunities

Not enough recreation

Shopping facilities

Shopping facilities	Shopping facilities
Shopping facilities	

State's fiscal situation

States fiscal situation	State's financial situation
State financial situation	State's fiscal situation
States fiscal situation	State's fiscal situation
State fiscal situation	State fiscal situation
State's fiscal situation	State fiscal situation
States fiscal situation	State fiscal situation
State's fiscal situation	State fiscal situation
State fiscal situation	

State and Federal regulations

State and Federal regulations	State and Fed regulations
Staying competitive in a place where state employment laws are not enforced	State and federal regulations
State regulation (too many)	State and Federal regulations
State and federal regulations	State and federal regulations
Need more government support to allocate more salmon to commercial sector	State and federal regulations
State/fed regulations/taxes	State and fed requirements
State and Fed regulations	State and fed regulations
State and Federal regulations	State and federal regulations
State regulations	

State and Federal tax policies

State/Fed tax policies	Educational system
Hi taxes	State and local tax policy
State and Federal policies	State and Fed policies

Tax	State and fed tax policies
State and federal tax policies	

Sustainability

Sustainability

Traffic Congestion

Traffic	Traffic congestion
Traffic	Transportation
Traffic congestion	Traffic
Traffic congestion	Summer traffic
Traffic congestion	Traffic congestion
Traffic and/or transportation	Traffic
Traffic congestions	Traffic can be bad during special events
Traffic	Traffic
Traffic congestion	Traffic congestion

Transportation system

Road system access to Interstate 32	Lack of railroad and air service
Transportation in and out of area and within area	Transportation
Interstate transportation	Bad transportation system
Transportation	Road and traffic conditions
Hwy 30 upgrade with Astoria and Seaside by pass	Transportation cost is high
Underdeveloped airport	Transportation handicap
Transportation	Transpiration system
Bad streets and roads	Transportation system

Utilities cost

Utilities cost	Utilities too costly
Utilities cost	Utilities cost
Utility cost	Utility costs

Vital downtown

Retail downtown	Vital downtown
Vibrant downtown	

Workforce availability

Workforce quality	Workforce availability
Jobs	Getting people to actually work
Availability of quality workforce	Limited workforce
Workforce availability	Workforce availability
Workforce available	Work force availability
Available workers	Workforce quality
Labor pool	Lack of well trained workforce

Workforce availability
Workforce availability

Workforce availability

Workforce quality

Uneducated population
Workforce quality
Workforce quality
Workforce
quality/alcohol/drugs/theft
Workforce quality
Specialized workforce
No qualified workers
Workforce quality
Workforce quality
Workforce quality

Workforce quality
Workforce quality
Not many qualified workforce
Local training
Workforce quality
Workforce quality
Workforce quality
Workforce quality
Poor labor pool
Qualified workforce

Other

People are poor
Income of average household
Low wages
Work force quality
Public agency attitudes
Attitude of community
Community attitudes
Retirees don't want change
Lack of willing state/federal
government
Antagonism towards commercial
fish in media
No growth at all cost (N. County)

Desire to keep old property, no
value (N. County)

Unwillingness to allow technical
growth
Citizen no-growth pressure
City governments lack of vision
Lack of leadership form community
leaders
Availability of good jobs
Not enough jobs
No jobs that pay 25+
Most work is seasonal and part time
Loss of timber/fishing jobs

Drug subculture
Drug and alcohol climate
Influence of drugs
No labor pool in summer
Too seasonal
Seasonality
Too short a tourist season
Seasonality
Poor local leadership

Retail diversions

Small town limited developed
resources
Diversity

Newer housing sale/rent

Hi taxes
Available land
Lack of logistically availability

Parking
Building inspector turnover
The port
No selection
High prices

Limited family wage jobs	Poor hours
Unemployment, low wages	Isolated and looked down on by Portland
Limited employee pool	Sustainability
Lack of effective economic development	Natural resources
Community/residents shortsightedness	Availability of technology
Weather	Weak local newspaper
Weather	

Q-7. Please list the top three steps the Clatsop County government could take to improve the county as a place to do business.

More Focus on Economic Development

- Target companies with family wage jobs in recruitment
- Aggressively market light industry at Port of Astoria
- Business relocation search com
- Be pro business
- Actively seek family wage paying industry
- Hire econ development specialist
- Make econ development a priority
- Promote economic development
- Be more aggressive in inviting businesses into county
- Let Port of Astoria lead county on economic development
- Control type of business coming into county (limit max super stores)
- Initiative and compensation for new businesses
- Develop riverbank area for shops and tourists
- Bring in some industry
- Diversify economic base
- Expand/shoulder businesses relating to raw materials i.e.: boat building
- Get serious about economic development
- IRB financing

- Bring new industry
- Stay out of the way of new business
- Encourage new businesses
- Make available industrial sites
- Support workplace training program
- Advertise for clean businesses and manufactures to move here
- Encourage growth and development
- Welcome manufacturing businesses
- Open land to all new ventures
- Economic planning and development
- Look beyond traditional econ dev e.g. beyond recruiting
- Continue to develop/promote marine recreation and tourism
- Go out and attract business
- Encourage entertainment type businesses to cater to (/) (118)
- Try to bring industry
- Encourage Walmart to come
- Marketing
- Push for more industry/good paying jobs
- Use local businesses as #1 supplier
- Foster and economic development business park
- Push for more industrial businesses to diversity economy
- Be more open minded especially to new business
- Help to provide capital
- Create more competition
- Get business to come i.e. Fred Myer, Costco. We need businesses that will employ and train our people here
- Diverse economic base
- Bring in more diverse businesses Walmart or BiMart
- Release state economic development funds to cities
- Allow new business in

- Stop encouraging new businesses that only offer minimum wage jobs
- Do not bring in big box stores
- Promote economic activity to create jobs
- Actively recruit business development
- Promote to industries other than tourism
- More business that don't depend on tourism
- Be aggressive with a game plan to go after diverse, clean, profitable businesses that will be here for years to come

Less Focus on Environmental Quality

- Back off on wetlands issues
- Ignore environmental nuts
- Stop the environmental agenda
- Not set aside valuable useable land as park space
- Support regional medical center

More Focus on Environmental Quality

- Relief of wetlands
- Continue responsible and historically oriented development/clear up river walk
- Do not support environmentally damaging businesses
- Better wetland regulations
- Environmental consciousness

Make Government more efficiently and/or less costly

- Have town hall meetings to meet commissioners and receive input
- Cooperation between government units
- Change leadership (including Dept. Heads). Too many retired busy bodies as commissioners. No vision, leadership
- Be more respectful and responsive to citizens complaints of waste, fraud and abuse
- Listen to their constituents
- Operate like a business

- Advocate to both state and federal agencies for more local allocation of resources
- Quit acting like “Gestapo” to business owners and empl
- Elect more experienced commissioners
- Cut overhead
- Quit spending money don’t have
- Interfere less
- Meet/talk/ask for help/advice
- Too many want this to be a retirement/art community
- Elect a new more moderate board of commissioners
- Be less of a ‘good ol’ boys” government
- Use fair bidding practices
- Review what we do now and find out what is effective and what isn’t

Improve Attitude about Growth

- Open their eyes to the benefits of change, progress and modernization
- Encourage growth for business
- Forget the past and how it used to be
- Be more accessible (i.e. more friendly and helpful)
- Change attitudes to we’re here to help not cause obstructions
- Improve community attitudes towards big business
- Help to change community attitudes towards allowing better shopping facilities
- Pro growth
- Be business friendly
- More overall support of downtown business
- Business friendly
- Improve the year round business outlook
- Improve the business climate and attitude

Improve Affordability and Quality of Housing

- Acquire better housing market
- Develop affordable housing re: wages and jobs structure
- More affordable housing (increase labor pool)
- More affordable low-income housing

Improve Internet Access

- Improve access to technology
- Improved internet

Develop and/or Improve Port Facility

- Attract shipping to Astoria instead of Portland
- Airline + reduce Port of Astoria security issues
- Not too much growth, keep small
- Improve product shipping options
- Better cooperation w/ Port for economic development
- Port of Astoria seems underutilized

Increase Regional Focus

- Find a way to have Seaside, Warrenton, and Astoria work together
- Get the communities to work together better

Simplify or Streamline Regulations

- Less building permit hassles
- A stable permitting & inspection dept.
- Easier to get permits
- More lenient local government regulations
- Get this land use stuff figured out so the pent up demand can start materializing
- There's avail land but too many restrictions
- Stream line all operations
- They use it as a weapon, permitting and community process need to be changed
- Remove roadblocks (regulations and permitting process to development)

- Reduce time for land-use permits
- Better at enforcing codes
- Less regulations on planning/permitting
- Speed up the permit process
- Cut unnecessary regulations
- Change zoning laws
- Simplify permit process
- Business friendly
- Simplify permit
- Ease permitting requirements and costs
- Streamline building permits
- Develop fast track for new businesses to develop
- Stop acting like the Nature Conservancy
- Streamline permitting
- Reduce regulation on land requirements
- Less regulations
- Attempt to get around negative State regulations
- Zoning
- Permitting
- Improve permit process
- Make the process for expanding business easier
- Do away with some of the permits and bureaucracy
- Make the permit process less cumbersome
- Ease land restrictions
- Charge less for permits
- Permits are bad
- Local government regulations bad
- Streamline permit process
- Streamline planning/permit process. Clarify requirements to intended parties early in process

- Lane use, every mud puddle is not a wetland
- Less restrictive permit process
- Lessen regulation difficulties
- Perimeters work for the public not against
- Cut county red tape
- Make permitting process easier for business
- Relax regulations
- Simplify the building permit process
- Plan land use on local level
- Speed up permitting
- Lead with state and federal official on changing unfair regulations
- Cost of doing business
- Decrease time spend waiting for inspectors/permits
- Bring city permitting agencies in line with county agencies and get rid of the folks that don't have any ideas what their purpose is
- Permitting process
- Centralize the permit approval system
- Speed up the approval and services process for plant permits
- Get rid of some of the unnecessary paperwork
- Decrease regulations
- Limit regulations
- Permits
- Reduce regulation
- Growth management policies
- Streamline fee and permit process

Improve and/or Develop Roads

- Master plan to handle future traffic
- Promote solutions to clogged Hwy 101
- Develop traffic plan for all major roads

- Deal w/ODOT's stifling of Hwy 101 corridor development
- Better roads
- Road maintenance
- Research possible bypass between Astoria and Seaside
- Solve traffic congestion
- Reduce summer traffic congestion
- Develop infrastructure
- Highway congestion, get big trucks out of downtown areas
- Support a by pass so unnecessary traffic could less damage our livability and tourism
- South County/Seaside traffic congestion
- Improve infrastructure

Address Social Problems

- Reduce meth abuse
- Small group of special interests control all levels of government
- Attitude of its citizens
- Convince cities/citizens to expand their mindset to think county wide rather than individually
- Work on changing attitudes to be in favor of business
- Affordable health insurance
- More money to day care and pre-school programs
- Crime rate reduction
- Clean up drug problem
- More "public" forum (no communication w/business)
- Hold people accountable (no discipline for poor/error etc.)

Reduce Tax Burden

- Lesser local taxes
- Tax relief on business investment
- Tax incentives for SO + employers
- Eliminate taxes, eliminate welfare office

- Eliminate taxes, cut welfare handouts
- Do not increase taxes, do not enroll new welfare recipients
- Tax cuts in initial set ups
- Property tax reductions for manufacturing companies
- Do not raise taxes
- Lower taxes
- Give incentives for business to bring jobs
- Reduce property taxes
- Eliminate taxes and over regulation that doesn't lead to anything but stopping development
- Tax breaks
- Limit taxes
- Taxes
- Lower taxes and fees
- Lower taxes

Offer Tax Incentives to Businesses

- Give a break to new businesses w/tax relief
- Reduce permit fee for new businesses
- Tax incentives to major/minor business ventures
- Tax incentives
- Tax breaks for new business
- Give incentives

Increase Tourism

- Find a way to bring in more tourists in Nov, Dec, Jan, Feb, Mar, Apr, May
- Encourage tourism to flourish
- More winter type events to draw tourists
- Continue to support tourism
- Increase tourism interest in North County

Improve Transportation

- Upgrade rail line between Portland and Coast
- Promote air and trains to county
- Work to develop transportation infrastructure e.g. Astoria bypass
- Improve transportation
- Transportation (i.e. Highway)
- Create bypass routes to reduce congestion
- Improve transportation
- Improve infrastructure i.e. airport development in Seaside
- Better transportation so local people can travel more efficiently
- Help redevelop the Ports of Astoria
- Regional air service
- Railway seems underutilized
- Improve transportation (roads)
- Improve infrastructure
- Hwy 30 bypass

Encourage Well-Paying Jobs

- Encourage development of family wage jobs
- Go after family wage jobs
- Attract a core employer paying \$20/hr wage
- Encourage new jobs with living wage
- Add jobs
- Create more jobs
- Be more aggressive in attracting businesses with family wage jobs
- Attract family wage jobs
- Be an ambassador for new family wage jobs and industry

Increase Workforce Training

- Educate staff to current regulations
- More education

Other

Parking

- Improve parking
- Parking
- More parking downtown Astoria
- Provide more parking for shoppers
- Create more downtown parking
- Improve parking in all towns
- Parking

Education

- Improve college quality/offerings [at] Tech center
- More support for Clatsop Community College and MERTS
- Improve educational access and staffing
- Educating
- Site a new location for community college
- Move the community college off the hill
- Improve schools
- Education
- Improve the community college
- Improve community college
- Improve the community college programs

Infrastructure

- A better infrastructure
- Reduce gov't costs
- Build and new correctional jail facility
- Invest in the parks and recreation areas
- Help develop industrial park
- Improve access to technology for the area
- Help Warrenton with water and sewer issues

- Improve the State's vision of our area so that ODOT will improve the roads and bridges
- Continue to improve Astoria in general
- By-pass downtown Astoria
- Do not enlarge existing Hwy 101
- By pass of Astoria #1

Government

- Too much government
- Less government
- Push state gov to get out of the way
- No to ODOT

Financial

- Find a way to reduce cost of advertising in visitors guide
- Increase the budget for the sheriff department
- Doing business within the county spend money locally
- Cut cost of doing business
- \$\$

Public Participation

- Adopt a services oriented policy towards the public
- Stop trying to operate below public radar
- Engage the local businesses better
- Let citizens become more involved in decision making
- Involve the public in all master planning efforts

Government Attitude

- Not be so aloof
- Listen better
- Don't be obstructive to business
- A more "modern" attitude towards growth
- Local officials need to be more approachable and not so nasty to local business owners

Other

- Help with increasing utilities expenses
- Tell Corps of Engineers to piss off
- Maintain way of life on the coast
- Work harder to say yes than to say no
- Working relationship w/state (maybe of their control)
- Prosecute absent landlords who neglect their property
- We need more availability of materials both raw and man made
- Strategic planning
- Conference Center support
- Consistency
- Assure that they will never compete with private business
- Quality day care
- Improve ethical standards among local leaders
- Strong manager, weak community for government
- Assist in saving marketing assistants
- Shorten time on expansion
- Research other avenues of development beyond tourism
- Spread the wealth, South County's \$'s don't equal return too much goes to Astoria
- Enforce regulations
- Reduce crime
- Better shopping facilities
- Help control rising utility costs
- Respect property rights
- Change charter to elect commissioners at large
- Foster working relationship with Coapoe Engineers
- Recreation opportunities
- Sustainability

- Better advertising of county resources
- Educate residents on why tech. and tourist growth is a positive
- Help create more large events (volleyball, Hood to Coast, Sandcastle, etc.)
- Advertising campaign promoting local history, museums, etc. targeting Pacific NW
- Leave measure 37 as it was meant to be
- Enforce building codes and standards and higher levels than presently enforced

Q-10. Please indicate what you think the Clatsop County government's policy should be towards economic growth.

- Growth without compromising quality of life or environment.
- Need jobs industry
- Encourage compatible economic growth
- Responsible, historically oriented, focused economic growth
- With clean industry
- We don't want to lose our quality of life
- Government should stay out of private business
- Economic impact vs. social impact
- Non-tourist and family wage
- Keeping in mind that most residents want to keep the place naturally beautiful

Q-11. Who do you feel should be working to promote economic development in Clatsop County?

- Port of Astoria
- Everyone
- Port Commission, lots of land is owned by the Port and should be utilized
- Let the business people promote economic development and the other agencies stand ready to assist us not and then.
- Government should respect good science and reduce restrictions on utilizing natural resources and land. News

services can change anti-business mentality, i.e. Daily Astorian and local radio reporting.

- Port

Q-12. Do you think there are barriers to economic development in Clatsop County?

Less Focus on Environmental Quality

- Environmentalists
- Environmentalists keep business out
- Tree hugger's
- County and State agencies have kept the coastal strip as pristine as possible to encourage tourism, this in turn has kept economic growth from happening
- "destruction" of quality of life and environment
- Environmental issues
- Environmental concerns

More Focus on Environmental Quality

- Development must be balanced with environmental protection. Some industries are not able to achieve that balance

Negative Government Attitude About Growth

- Lack of unified approach between local municipalities
- assisted by state and sometimes local government.
- Local government
- Govt interference and (/) (31)
- Same "no" citizen, satisfied with present situation, relish change
- The county has no expertise or fortitude to carry out economic growth. I implore you to let the Port lead the charge. They have what it takes.
- See question 11
- ODOT LUBA
- Need a plan w/a hired executive director with know how
- Citizens/govt (some) only desire certain types of economic development (tourism) this county needs industry to build jobs

- Local government
- Local city governments do not welcome new business. The refused to let Home Depot, Walmart come in. the supply would be cheaper if we have more business
- Fragile environment. Community mistrust of government and big business
- Leaders that have their own agenda and loyalties
- Negative Attitude Towards Growth
- lots of people with negative attitudes towards growth
- Clatsop County continues to discourage growth and makes it hard for businesses to grow by fighting them every step of the way
- don't want things to change
- Community attitude
- community stagnation
- Too much negativism
- Fairly influential residents who don't want economic growth, fearing the change
- Attitude
- Tree huggers or older people who have made their money and don't want to see any change
- Attitude concerning growth
- Backwards attitude
- Old timers, close minded individuals afraid of moving forward
- Climate that discourages new businesses
- Citizens are afraid of change
- Vocal minority who are anti-business, anti-development, anti anything
- Certain small cities wanting to stay small
- Individuals clinging to the past who have continuing interest in land, buildings or other key individuals. I think the Port of Astoria is at times because of tax base which shows a minimal return, while if left in hands of tax payers it might have greater economic impact on county

- Older, vocal people do not want change
- Attitudes towards tourism, change, and newcomers
- This area wants to remain a tourist attraction with minimum wage service jobs
- Some community attitudes that discourage certain kinds of business
- Negative attitudes in the community
- Lack of positive attitude
- Some towns do not want any changes. They are unwilling to have any large companies come in near them
- Just attend the Calpine sitting information meetings, vocal anti-anything sep change same with ODOT meetings
- Territorial thinking/no vision. We are all one economic enter: from Cannon Beach to Astoria with our collective strengths, diversity and weaknesses
- People that will not let development come in. Too many tree huggers
- The current leadership commissioners that is stuck in “old” way of doing business based on outdated practices, information, and way of thinking. Need to look at all options that may present themselves. The permit and fee process needs to be streamlined
- City views of changing industrial zoned areas to housing on prime river frontal property. General mind set of city
- Not as bad as it was in the past but we discourage almost all economic growth in the county

Land - High Cost or Lack of Availability

- Lack of land to be used for development
- Lack of access to transportation for marketing goods
- Land availability
- Location
- availability of useable land
- Land
- Lack of land that is given to the whole

- Perception of remoteness (physically remote) high local “hidden” taxes (phone franchise tax, etc.)
- Access to available land for development

Lack of Good Port Facilities

- The Port district promoting North County, particularly Astoria.

Regulations

- zoning, lack of shipping
- Too much red tape
- Land use regulations
- Regulations that are ridiculous, time consuming “make work” projects to insure their own jobs.
- State and federal regulations unfairly limit responsible growth in fishing, timber in the name of environmental protection.
- cost of doing business
- Too many government hoops to jump through. Gentlemen’s agreements don’t work here, “just get it in writing”
- Permit process
- Land use regulations, red tape
- Most are afraid to build and/or expand because of all the problems and headache’s involved in the approval and building process
- Permits
- Regulations, land use laws
- regulations
- permitting process, too many regs on land use
- govt (local) restrictions
- Too much administration versus “real” working people being allowed to do their jobs
- state permitting process
- Lack of available land/land use regulations
- Governmental regulations
- Restrictive land use

- Quality of existing development is very low. This will negatively reflect our “built environment.”
- Restrictions and governmental control of land use, fishing, logging. Promotion of tourism to the exclusion of real basic production
- political and regulatory interference from outside the area
- State restrictions and local governments lack of concern for what the citizens want
- Permitting process and anti-business attitude of government employees

Roads and Automotive Access

- access to customers traffic
- Traffic congestion, poor roads
- Better access to I-5
- Transportation
- The narrow corridor through Astoria mountains on one side, river on the other, need 4 lane highway from Portland to Seaside and north
- Lack of Skilled Workers
- Education
- High welfare uneducated population who do not want to work
- labor pools with experience
- labor [educated]
- labor pool
- Workforce
- Poorly trained labor pool, county doesn't encourage business and investors outside the
- Untrained workforce

Transportation Issues

- Remote, off I-5 corridor
- Location of our city to viable shipping lines
- Transportation
- Distance from markets, poor highway no rail

- No railroads, no air service
- alternate access to I-5 corridor
- transportation costs
- Transportation costs
- lack of Astoria bypass
- Distance from I-5, no air service
- Air transportation (scheduled)
- Underdeveloped airport, poor transportation (Hwy 30) to Portland
- Transportation
- Tourism stopping places parking employee parking Astoria and downtown

Lack of Well Paying Jobs

- Poorly trained work force, need much more training
- high percentage of minimum wages jobs, affordable housing
- Lack of wage earning jobs, tourism doesn't cut it

Other

Taxes and Fees

- High tax — local business leaders are not invited to participate in recruiting
- Property tax high
- tax structure
- Fee's, fee's and more fee's.
- taxes
- Taxes

Government

- Governments do not have foresight
- Government at levels and is half full of citizens that are not even native to Clatsop County
- The ability of local, county, and state agencies to work together without special interest groups
- Personals agendas in county and city government

Attitudes

- Old attitude of not wanting any changes, left leaning activist
- The people that are here. People that move from other areas and take over government
- Very vocal public many who want to keep Clatsop County their own little haven
- The people who have homes here but are not residents
- Old money not willing to vision or move ahead
- Too much depending on government grants and support and opposition to new businesses or growth that would accompany new businesses with too much regulations increasing the cost with no guarantee of success through the regulation maze.

Location

- Distance from Portland
- Population, remote location
- Distance from markets

Others

- lack of raw materials available
- Availability of raw materials
- Environmentalists (wetlands, conservation areas, etc.)
- Environmentalists
- Quality work force
- Ag identified
- Too many groups trying to do it
- Assistance is needed to implement small business opportunities
- They are beginning to be addressed but it is too early to see the results yet. Positives: Port development, river walk development, downtown restoration, increased cruise ship tourism, establishment of upper-scale hotels and businesses (i.e. Elliott Hotel, Columbia River Day Spa and Valley Barge, etc.) and development of old cannery sites for tourism
- Grants/money/education

- Seasonal business varies drastically and somewhat unpredictably
- Only those businesses that can provide essential products at or near the coast survive and generate profit allowing too much competition for small, independent businesses to grow or survive long term. There seems to be a barrier for small independents and a demand for large, super stores in this retail market.
- Small groups making decisions without public forum or input
- See the list of negatives
- county and private sector
- electrical power, reliability
- Seaside is going to fail as a business community if the county doesn't open up land and be slightly more forgiving and positive towards new plans, ideas, etc. We need something besides tourists to sustain this community through the winters. The people and their quality of life are suffering due to lack of industry.
- Why would I want my tax money competing with myself?
- no one wants to take responsibility for decisions so you play the shuffle game and once you think you have complied the game changes with new rules businesses do not have access to information
- Absent landlords
- longshoremen
- Great Clatsop County as a Portland Public Park (measure 34) yet build dams that destroy fishing
- capital
- Seasonal
- Education
- Population base and education
- small population
- Rain
- Not enough diverse things to do when it rains
- You have to fish or log
- Read the responses elsewhere

- Example, local (but not minority) opposition to Calpine's LNG plant

Q-14. Please evaluate each policy or process in terms of its impact on Clatsop County as a place to do business.

- No growth attitude
- Hidden franchise tax
- Lack of parking and congestion
- Too many hassles to get buildings done
- Enforce to employers

Q-25. Please indicate the type of industry or profession that most accurately describes your business.

- Fraternal organization
- Beauty service
- Consulting
- Outdoor recreation
- Retail recreational
- Tourism
- Consulting engineers
- Grocery
- Museum
- Manufacturer's representative
- Veterinary services
- Export
- Tourism
- Motel industrial laundry
- DARiS
- Housing authority
- Church
- Golf course
- Auto dealership
- Sewing and alterations

- Travel and tourism
- Household goods/office moving/relocation
- Child care center/preschool
- Landscape service
- Public accounting
- Auto sales and service
- Medical
- Apartment complex
- Post office
- Excavation and underground utilities
- Pet boarding and retail
- Media
- Tax preparation
- Campground/RV park and grocery store
- Auto and truck repair
- Lawyer
- Real estate sales
- Labor organization
- Tourism
- Accounting
- Land development and sales

Q-27. Please share any other comments you have in the space below.

- Nearly impossible for me to fill this out – Our business is in Cannon Beach, which is completely different than the rest of Clatsop County.
- Traffic jams are a deterrent to business. If trucks, movers, busses, etc. were able to go around our cities, the locals and tourists would be much happier and quality of life would improve. It would help both business and our sustainability. Those who choose to go to Warrentown for example would not have to suffer driving through either Seaside or Astoria traffic just to arrive at their destination. Example: Cannon Beach

- The highways and roads throughout Clatsop County are extremely congested, making our business less safe and productive. Also, there is a great lack of young workforce for our business. Those available are not responsible, ambitious, and dependable. The drug and alcohol problems in the county are immense, especially with the 30 and under population. That further hinders our ability to hire young workers that our business greatly desires. The attitude that tourism can make communities thrive is a weak assumption. Low wage jobs do not attract families, the desired workforce or permanent residents.
- The County Commission needs to lead in a positive way. The split vote on Measure 34 show it lacks a clear vision on what is best for Clatsop County as a whole. Even though commissioners are elected by district they need to act in the best interests of all the county particularly those in the private sector who employ the workers and provide the economic vitality that is essential. They were not elected to make Clatsop County a park for Portlanders. The Commission should unify the county as one economic entity. Clatsop County needs leadership that overcomes North County/South County attitudes that would benefit one and hurts the other. Of the South County commissioners are perceived to be anti economic development. Positive economic development attitudes need to state at the county commissioner level.
- Too many different agencies trying to do the same thing. Too much duplication in government. Most businesses will deal primarily with local government. County government should concentrate on law enforcement.
- I have lived here 7 years and watched the people struggle economically. Homes are run down and in need of repair, it is unfortunate that where there are people the need for jobs exist. Logging and fishing no longer support the area and families who thought they could retire have many years before that can happen. The need to bring industry in exists, unfortunately some will adversely affect the environment. We have a huge meth and crime problem in the areas which threatens small business daily. I have heard and witnessed the permitting issues for building a home. People can't afford to build and when they do the process is unbelievable. Someone should just sit in the office between the building and land use , what a sad situation. It's a shuffleboard from one counter to the next with no clear path. No one knows what the other guy is doing.
- Having said the county should encourage more business let me qualify, Clatsop Co. has hundreds of small businesses which would be hurt by the entry of a big box store (Home Depot/Walmart). The county must protect the small

businesses from encroachment and financial ruin. 100 small business is better than one big box. Encourage support the small business program through CCC. Provide a forum for cities/communities to work together to promote the whole county and reduce intracounty competition. Reinvent the fairgrounds for a broader use. Tourism is an economic reality. Work w/schools to educate re the “economics of tourism” and why it’s good (not a necessary evil). Work on the county roads that are within cities (e.g. Wahanna Rd reduce to 25 mph). Work for truck bypass.

- We could really use one or two additional department stores beside the Fred Myer (i.e. Walmart, Target, etc.) Current tourism promotion is confined to a few select areas instead of promoting the area overall. The current Hwy 101 planned expansion in Seaside is a big mistake! The planned traffic flow will not encourage visitors to “stop” due to the limited access of the plan.
- Some of the questions on this don’t apply because this is a government business.
- Unified marketing plan for the entire county would help increase tourism industry
- With resources including funding, land, labor — Clatsop Care Center Health District would like to replace our existing nursing home, build senior housing/retirement complex with access to services. Our biggest challenge is land availability and infrastructure of land available.
- If it were not for those tourists, where would the county be today. Yet no discussion is towards that area. The Port of Astoria only focuses on North County and lets South County serve as the income to develop N. County. What a great balance and source of discontent in the county.
- We are against any programs that require additional tax dollars. When given the choice between assistance programs or less taxes, please give us less taxes.
- We are a corporation owned business owned and operated through Sara Lee, NC
- Look at assessed Values in the County. You will find there is huge difference from North – to – South. Look of reasons since population is even.
- We seed help attracting more conventions encourage locals to shop downtown. We absolutely need more parking.
- City of Astoria public works and Mayor have no clue what our small business involve. They are out of touch. The city

administration needs to take a tour of business once every 6 months or more. Small business owners in downtown Astoria have worked very hard to better the city. Astoria business has so much to offer a great selection of shops with quality items to offer. Parking is absolutely insane. Chamber of commerce does nothing for its members. City county employees have all the benefits (free parking close to work) Lets spread out the benefits to the small business owners that make Astoria Shine.

- All my children had to move away to find jobs that would allow them to make a good living. All my employees do not make enough money even to get by. Sad isn't it.
- Disband the Economic Development Council (CEDC) – they don't accomplish anything! Too many people here try to obstruct new businesses and are anti-development. They've "got theirs" and "to hell with everyone else!" That includes elected officials – one example is the sale (and subsequent removal from the tax rolls) of the Sunset Beach property. Astoria is in the process of removing another chunk of prime commercial property (the old Safeway) from tax rolls – what is a city doing in the development business anyway? Someone in the private sector such as Randy Stemper or Kirk Fausett, could have done a great job developing that block, without the use of taxpayer funds. Government should not be in competition with private business.
- Astoria needs parking facilities the ease of access to some along with their obvious existence and helpful conditions for employee parking. (good and bad) the 'strip' south of Wannenton is taking Hwy. 101 frontage- new business environment new land taking goes on more blacktop but shouldn't some plan be required to recover the vacant land Bldgs. (Sad) □just a thought.
- Please stop spending tax money on this type of thing. Don't use tax money to bring more business to compete with me let business operate on its own
- Oregon needs to shift the % of taxes paid by business back to where it was 20 years ago instead of making wage earners pay them.
- Port of Astoria should be handed the baton to lead the county in economic development. Clatsop County has at best showed a Negative impact on Economic Activity in Clatsop County. The time for change is now!
- If anyone knows how to really fix a leak (or maybe?) in a 106 yr. old home.... That would really be helpful. Until I find the source of the leak(s) I hesitate to expand, because the cost of

repairs is unknown at this time. Thank You, Phone # 325-7777
C.C. Maxwell (“a voice crying in the wilderness”)

- When you figure out how to get individuals and small groups to sacrifice for the good of the whole, you can then move forward. That being said how do you also keep the whole from running roughshod over the individual? Good luck we need it!
- I have done business in Clatsop County for 20 yrs. I find it difficult to compete w/ other businesses that don't carry workman's comp. Don't file 941's on their payroll don't pay overtime etc. This Practice is not enforced in Clatsop County at all. There are so many people working with no accountability. They just go into a bank cash a check for cash in a business pay their workers in cash and charge about half of what a licensed and Bonded business charges.
- County talks development but doesn't fund a department or specialist devoted to this. Such a department should be responsible to work with state and public utility development people also should encourage cooperation of cities and Prov. County can be involved in Planning, water and sewer availability and other site preparation so that we're ready when the opportunity presents itself. A 48-hour response to on inquiry with answers to requested information and assembly of a group of local citizens to respond should be goal of county.
- Economic development should preclude Walmart type development. Of particular concern are low wages, no benefits, and employment practices.
- My son is a 5th generation Astorian my Grandfather always said if you can make a living in Clatsop County you can make a living anywhere. The only reason my company survives is because 90% of our work is outside Clatsop County, Portland, Seattle, Tacoma, Etc. My son went off to college this year when I said goodbye I knew he would be home to visit but he was leaving forever.
- The highly seasonal tourism business is a tough thing. We need more reasons to bring tourists to town year round, not just summers and Holidays. Taxes are high – property keeps “appreciating”, but you cannot pay employees with the appreciation – you have to sell the property to access that money. Most employees here are in a tough position. They must work 2 or even 3 jobs to survive in summer – but in winter they are lucky to work at all. Find reasonable businesses that will attract people here in all seasons – It will prosper.
- As a business we are looking to expand and move, we are looking at \$60,000 per year increase Tax Liability on Property.

Without a move from our current location, we will fail to be a long term Employer in the County. We have an old and inefficient building; a new building will increase efficiency, but will be far from covering the additional cost of the new Tax Burden.

- Overall Healthcare costs are a Major Concern
- There is a huge pent up demand for good commercial locations. The county shouldn't have to put much effort or give away much of anything. There are enough businesses trying to get here but they can't find suitable locations. I'm being displaced because the price pressure finally got to my landlord. Availability of suitable alternative locations is nil. I expect this to impact me slightly to majorly I'll end up paying way more for less. In a time of eroding profits I may not be able to survive.
- Overall the right things are happening. They just need continued support (including financial) to see them through. Then Clatsop County (in particular I speak of Astoria, OR) will begin to see the results. Overall improvement in education, medical care & insurance costs will be beneficial to business owners and employees alike. It is currently problematic.
- I look forward to reading the results of this survey. Still overall the questions were poorly formulated and phrased. Who ever compiled them should do more research instead of using cliché questions. (I hope no one is paying for this particularly not taxpayers)
- In my industry the downfall of my type of establishments is too much competition of the same type of business. No one has a problem with the city giving them a LIQ LIS & no one ever says there are too many restaurants etc. But they will say there are too many of these or too many of those etc.! Competition is fine to a point!
- Prepare a survey that has a direct bearing on what county government can really do.
- Identification and recruitment of compatible small employers is crucial to growth.
- The county is doing a very good job of directing the county now & in the future. The major deterrent to growth and improvement of quality of life in Clatsop County is the dismal situation of the State's Finances. The state does little to support growth in our county and thru decreasing funding for education has put our future to have high quality employees and employers in our area is a crisis. Also land use policies and ODOT policies have either stopped development or

increased the cost of development of business. So our county will have to continue to fight for the people in our little county and let the state know how its poor handling of our states finances is hurting us!

- Confusing Questionnaire, differentiation between doing business within the county, which includes Cities vs. county outside of city.
- I need to grow to survive the labor pool is poorly trained and the land to expand is hard to come by. This makes it difficult for my Business.
- Too much state control; Land use too restrictive specifically - wetland issues.
- I hope that the passage of measure 37 doesn't become stalled out by legal actions. This measure will allow the areas that are outside the main Hubs and I-5 corridor to hopefully become more stable economically.
- Get Government in Control!! Rules, regulations, and taxes are killing small business.
- We need smaller government. We need less regulations so we can produce! Get out of our way and we will grow our businesses, which will bring in more tax money!
- Calpine seems to be a clean & responsible company. The county should do their own investigation & not to cave in to vocal minority.
- We need smaller government. We need less regulations so we can produce! Get out of our way and we will grow our business, which will bring in more tax money!
- To maintain business quality the reduction of drug/alcohol usage and prosecution of employee theft. Affordable employee housing in resort communities needed (Seaside, Gearhart, Cannon Beach) to provide stable worker environment. Quality childcare facilities for workers. Easier permit process for owner occupied businesses. Multi purpose community facilities library/housing/college/combined. Senior/drugstore/medical facility combined. Better use of existing lands instead of expansion. Re-use/re-zone for highest possible use.
- Bypass downtown Astoria with Hwy
- I will close my company next year and relocate to a business friendly state. In five years my business plan calls for 127 employees. I expect to spend 2 million in operating expences, payroll and six million in equipment and facilities in the first year. I have watched this county, the county commission and

its waste, fraud, and abuse. I would never attempt to put my money at risk with that group of clowns to be abused by land use regulation and development fees and process. I will not have my company pay to makeup for Oregon's decade of overspending and 18% biannual budget increases. This county has opposed development of shopping centers, industry at the Port, Tongue Point, Warrenton and opposed a super Port. It opposes everything. It will be a pleasure to live in a land of freedom and opportunity next year.

- I have recently learned that the Clatsop County Parks and Rec. Department is trying to push through plans to develop a RV Park/Campground less than five miles from us (north on Hwy 101) and less than 1 mile from another private park. This information came from a reliable source that serves as a volunteer on the parks and rec. advisory committee. Despite his and other committee members opposition, the county staff members are trying desperately to push this plan through. The volunteer committee members have been told to be discrete by county staff members ("they don't want to wave a red flag in front of the public just yet".) The primary reason the county wants this park is to generate revenue. To generate revenue the county will be competing with us and other private businesses. We have put out life savings into this place, not to mention our blood, sweat and tears. Local government should not compete with private business.
- With all due respect you already know what is needed. At trade shows other communities actively recruit us. You need to find an anchor manufacturing company, while keeping us happier here. I think we are now the oldest mfg. company in the county. We have thrived absent any positive help from county or city government. We may be leaving some day. Do you care? Gary Wygil C(/)(181) Equipment 503-861-2273
- Application and permitting process should be as streamlined as possible. Encourage economic development and protect the environment too. They shouldn't be mutually exclusive.
- Calpine seems to be a clan and responsible company. The county should do their own investigation and not to cave in to the vocal minority.
- I strongly believe that federal and state regulation and interference based on politics and emotion rather than scientific fact and reason have gone a long way to destroy the economic base of our region.