

# Gold Beach Buildable Lands Analysis

**Final Report**

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City of Gold Beach

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# Table of Contents

	<u>Page</u>
Chapter 1: Introduction.....	1-1
Chapter 2: Development Trends.....	2-1
Chapter 3: Demand for Land .....	3-1
Chapter 4: Buildable Lands Inventory.....	4-1
Chapter 5: Comparison of Land Supply and Demand.....	5-1
Appendix A: Parcel Database .....	A-1
Appendix B: Assessment Index Maps .....	B-1



# Chapter 1

## Introduction

### Background

The City of Gold Beach is currently in Periodic Review of its Comprehensive Land Use plan as required by ORS 197.628-650. As part of its Periodic Review Work Program, the City of Gold Beach is required to update its buildable lands inventory (BLI) and conduct an assessment of lands needed to accommodate population and employment growth over the next 20 years. Using funds from a Periodic Review grant, the City contracted with the University of Oregon's Community Planning Workshop to update its buildable lands inventory.<sup>1</sup>

Goals 9 and 10 of the Oregon land use planning program require communities to inventory buildable land and to maintain a 20-year supply of land for residential, commercial, and industrial purposes.<sup>2</sup> Consistent with the City's periodic review work program and our agreement with the City of Gold Beach, CPW:

- Developed a set of land classification definitions for the inventory of buildable land.
- Prepared an inventory of vacant buildable lands within the city and UGB using the classifications developed.
- Estimated the need for various types of land within the UGB using the coordinated population projection.
- Compared the supply of vacant buildable land with the estimate of land needs to determine whether the existing supply of vacant land meets estimated needs. If demand exceeds supply, then the City must determine if a UGB expansion is necessary to meet its needs.

The results of this analysis are presented in this report which is intended to be adopted as part of the inventory section of the City's comprehensive land use plan.

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<sup>1</sup> The Department of Land Conservation and Development administers Periodic Review Grants.

<sup>2</sup> Because it's population is fewer than 2,500 persons, the City of Gold Beach isn't subject to the requirements of ORS 197.296 which provide additional requirements for residential lands.

## Methods

A Buildable Lands Analysis is divided into two components: an analysis of land supply (how much buildable land is available by land use type), and an analysis of demand (population and employment growth leading to demand for residential and non-residential built space).

### Land supply

The methods we used to determine the amount of buildable land within the Gold Beach Urban Growth Boundary are based on the land supply analysis steps outlined in the Oregon Department of Land Conservation and Development's Planning for Residential Land Needs Workbook. The city is not required to comply with the provisions of ORS 197.296 pertaining to how residential land needs must be evaluated as the City's population is under 2,500 persons. The supply inventory steps, as described in the DLCDC workbook are as follows:

1. Calculate the gross vacant acres by plan designation, including fully vacant and partially vacant tax lots.
2. Calculate gross buildable vacant acres by plan designation by subtracting unbuildable acres from total acres.
3. Calculate net buildable acres by plan designation subtracting land for future public facilities from gross buildable vacant acres.
4. Calculate total net buildable acres by plan designation by adding redevelopable acres to net buildable acres.

Buildable lands inventories usually rely on data from Geographic Information Systems (GIS). Curry County does not presently have GIS capabilities.

CPW used Curry County Assessor's tax lot records as the base data for the buildable lands inventory. The records for Curry County were available in digital format; CPW used the tabular data, along with a set of evaluation rules to classify lands and conduct the inventory. Specifically, CPW used the following procedures to process the assessment data into a format useable for the land supply analysis:

1. *Identify all tax lots within the Gold Beach UGB.* The first step in the supply analysis was to filter out all tax lots not located within the City's UGB out of the database used for this analysis. We used County Tax Assessor's Maps and the City's Zoning Map to identify the UGB and which tax lots are included within it.
2. *Flag lots inside the city limits and those between the city limits and UGB.* Because of the City's policies with respect to infrastructure, we identified tax lots located within the city limits and those located between the city limits and UGB in the database used to conduct this analysis.

3. *Update acreage data.* Many parcels in the database lacked acreage data. CPW filled in the missing acreage values using the County Assessor's index and tax lot maps for tax lots located within the Gold Beach UGB. Many of the Assessor's maps lacked acreage data. In those instances, CPW calculated acreages using a digital planimeter. CPW also used a planimeter to estimate the acreages of parcels bisected by the City's UGB.
4. *Classify land by development status.* The next step in the land inventory analysis is to classify all tax lots by development status. Specifically, CPW used the following classifications: developed, vacant, partially vacant, and undevelopable (including physical constraints). CPW completed a "first-cut" analysis using a rule-based methodology. Tax lot records were analyzed according to a set of working definitions of different land use classifications. Following are the classifications and the definitions used to classify tax lots:
  - *Vacant land:* parcels greater than 0.075 acre (3,250 sq. ft.) with improvement value less than \$5,000.
  - *Undevelopable residential land:* land that is under the minimum lot size for the underlying zoning district, land that has no access, or land that is already committed to other uses by policy.
  - *Partially-vacant land:* parcels occupied by a use but which contain enough land to be further subdivided without need of a rezoning.
  - *Developed residential land:* land that is developed at densities consistent with zoning and improvements that make it unlikely to redevelop during the analysis period.
  - *Potentially redevelopable land:* land on which development has already occurred by on which, due to present or expected market forces, there exists the potential that existing development will be converted to more intensive uses during the planning period.

CPW developed a preliminary classification using these working rules, as well as aerial photos and other maps. The results of this classification were incorporated into an annotated tax lot database. CPW conducted field verification of land classifications in April 2001.

5. *Identify constrained lands.* Once this classification was complete, physical and policy constraints on vacant and partially-vacant land were identified. Constraints considered in this analysis, and which are consistent with the Gold Beach zoning code include:
  - Wetlands
  - Riparian areas and shorelines

- Floodplains and floodways
- Steep slopes
- Geologic hazards

Constrained lands are subtracted from the amount of net buildable land in a land supply analysis. No new constraint data were generated for this analysis. Data produced by the City's consultant on the wetlands and shoreline inventory were included. CPW also worked with City staff to identify existing constraint data. Because the constraint maps were relatively large scale, CPW did not estimate constraints at the tax lot level. Rather, we made a general estimate of constrained acres by plan designation and subtract that from total vacant acres for each plan designation.

In summary, the result of the land supply analysis yielded a set of summary tables, presented in this report, containing estimates of the amount of net buildable land available by land use type within the Gold Beach UGB.

## **Land Demand**

The demand component of a buildable lands inventory involves using population and employment forecasts to predict how much land will be needed over the 20-year planning period. Our analysis of land demand in Gold Beach is divided into an analysis of residential, non-residential, and public and institutional land need.

### **Residential Land**

Demand for residential land derives from demand for new housing which is in turn a function of population growth. CPW's estimate of residential land demand in Gold Beach over the next twenty years began with the Portland State University population estimate for 2000 and the County coordinated population forecast. Population growth is then translated into demand for new dwelling units by converting population growth into growth in number of households using an assumption about average household size over the planning period and assuming a vacancy rate. Finally, dwelling units are converted into acres using density assumptions for different housing types.

The number of residential acres needed to accommodate the estimated number of needed dwelling units is derived from an analysis and extrapolation of past development trends. We reviewed building permit and assessment data to determine the average single family/multi-family split for development and to then make an assumption about the probable housing split for future development. The density assumptions are then multiplied by the number of needed dwelling units to obtain an estimate of the number of acres of residential land needed to accommodate projected population growth in Gold Beach over the next 20-years.



## Non-residential Land

In Gold Beach, non-residential land includes land devoted to commercial, industrial, and marine activity uses. Several methods for determining non-residential land needs exist; the method selected depends on the amount and quality of data available. Larger cities frequently have sector-level employment forecasts that allow evaluation of employment growth and employment densities. Smaller communities frequently use the ratio of population to developed non-residential acres to estimate demand for non-residential land.

Unfortunately, Gold Beach does not have an employment forecast. For this analysis, CPW projected the existing non-residential acres to 1000 population ratio into the future. Using the City's 2020 population forecast, we determined the existing ratio of non-residential acres to 1000 population and applied it to the City's population forecast to project an estimate of future non-residential land need in Gold Beach.

## Public and Institutional Land

Generally, need for land used for public facilities such as parks, schools, churches, government, hospitals, etc. increases as population expands. Many communities have specific standards for such public facilities and lands devoted to them. CPW estimated public and institutional land need in Gold Beach by first identifying land used for public and institutional use within the UGB, then calculating a ratio of such land per 1000 population. CPW used the City's population forecast, with the ratio of public and institutional land per 1000 persons to project the number of acres of public land needed over the 20-year planning period.

## Organization of this report

This report is organized consistent with the methods described above:

**Chapter 2, Development Trends** is an overview of population and employment trends affecting Oregon, Curry County, and Gold Beach. This overview of trends will provide the basis for the projections involved in determining whether or not Gold Beach has an adequate 20-year supply of buildable land.

**Chapter 3, Land Supply** describes the supply analysis: how much buildable land by plan designation is available within the Gold Beach UGB.

**Chapter 4, Land Need** describes the demand analysis: how much land is required to accommodate estimated population and employment growth.

**Chapter 5, Comparison of Supply and Demand** compares the supply and demand to evaluate where shortages or surpluses are likely to exist.

This report also includes two appendices:

*Appendix A* is a printout of the parcel database CPW used for the buildable lands inventory.

*Appendix B* is a set of Curry County Assessment index maps that CPW annotated for the purpose of the buildable lands inventory.

# Chapter 2

## Development Trends

This chapter documents historical trends affecting land demand in Gold Beach. CPW's estimate of future land need in Gold Beach is based on an analysis of past development and population/employment trends. This chapter provides an overview of the development trends for Gold Beach using available data sources.

### Population and Employment Trends

Table 2-1 below shows total population for Oregon, Curry County, and Gold Beach between 1990 and 2000, as well as the projected population for 2020. Between 1990 and 2000, the population of Curry County grew by about 2,000 individuals, representing an increase of 10%, while the population of Gold Beach grew by 371, an increase of 24%. According to the Oregon Employment Department, the population gain in Gold Beach was at least partially due to the annexation of residential land north of the City in 1995.

Overall, the populations of Gold Beach and Curry County have expanded at a much slower rate than for the rest of the state. Population growth in Curry County since 1990 has been due to migration into the County, as deaths have exceeded births by 38%, according to the Oregon Employment Department (2000 Regional Economic Profile). Population growth in Curry County has reflected statewide growth trends in this respect. Notably, the population of Curry County has the highest median age of any County in the state.

The Oregon Office of Economic Analysis (OEA) forecasts statewide population will grow by 27% in the next 20 years, reaching 4.3 million by 2020. By contrast, the coordinated population forecasts for Curry County and Gold Beach project the population of Curry County will increase by about 50% and Gold Beach by 60% in the next 20 years.

Gold Beach has a coordinated population forecast of 3,018 persons for the year 2020. This is an increase of 1,121 persons from the 2000 population of 1,897.

**Table 2-1: Population for Oregon, Curry County, and Gold Beach, 1990, 2000, 2020**

Year	Oregon	Curry County	Gold Beach
1990	2,860,396	19,327	1,546
2000	3,406,000	21,200	1,897
2020	4,326,000	32,465	3,018

Source: Oregon Office of Economic Analysis

Data for the Gold Beach zip code area (97444) show that average household size in Gold Beach has steadily decreased since 1980. According to Claritas, average household size for the Gold Beach zip code fell from 2.5 in 1980, to 2.3 in 1990, to 2.21 in 1998, and is projected to decrease to 2.16 in 2003. The 2000 Census indicates about 2.19 persons per household in Gold Beach.

We assume that this trend in decreasing average household size will probably not continue indefinitely, however. Average household size probably will not get much smaller, and could actually increase somewhat over the next twenty years.

Finally, the population of persons residing in group quarters in Gold Beach has remained stable between 1990 and 2000. This population roughly doubled between 1980 and 1990, rising from 24 to 43 individuals. Between 1990 and 2000, however, this number only rose by one. Claritas projects the number of people in group quarters in Gold Beach to remain at 44 individuals through 2003. For the purpose of estimating residential land need, CPW assumed an increase of 10 individuals in group quarters over the planning period

## Employment Trends

The Oregon Employment provides no current estimates of employment in Gold Beach. As a result, CPW used statewide and County-level data to identify general trends affecting the Gold Beach economy. Table 2-2 shows total employment between 1990 and 2000, with projected total employment given for 2020.

**Table 2-2: Total Employment – Oregon and Curry County (1990-2020)**

Area	1990	2000	2020
Oregon	1,244,600	1,601,718	1,947,702
Curry County	5,651	6,807	8,626

Source: Oregon Office of Economic Analysis

According to the Oregon Employment Department, however, there has been no net growth in total employment in Curry County since 1990; employment decreased from 7,630 in 1990 to 7,600 in 2000. Unemployment in Curry County averaged 7.9% between 1988 and 1998, which exceeds the statewide average. The South Coast region has never had a jobless rate that was less than the statewide average.

## **Employment Trends by Sector**

When looking at employment trends by industry in the South Coast region and Curry County, the pattern that emerges consists of a decline in manufacturing employment, and growth in certain non-manufacturing sectors of the County economy—specifically services. Moreover, Curry County has had slower growth overall when compared with statewide employment trends.

Manufacturing employment in the Coos-Curry County region decreased by 37% between 1988 and 1998, with the biggest declines being present in the lumber and wood products industries. While employment in this sector remained stable in Curry County between 1990 and 2000, however, this industry is predicted to further decline according to the Oregon Employment Department. Lumber and wood products constitutes the largest manufacturing sector in Curry County

In contrast, employment in non-manufacturing related industries expanded during the same time period. Non-manufacturing employment expanded by 29% in Curry County, with more than half of this growth coming in the trade and service sectors. In Curry County, jobs in wholesale and retail trade increased by 34% between 1988 and 1998, most of this growth occurring in the restaurant trade. Service sector jobs, which include personal, business, repair, social, educational, and professional services expanded by 48% over this same time period. Gains in this sector have been made in private health care and social service delivery (which includes assisted living facilities) fueled by an increase in the number of persons of retirement age choosing to reside on the South Coast.

Statewide, non-farm employment is projected to expand by 18.5 percent in 2008. Manufacturing employment is projected to increase by 8.6%, or 21,000 jobs over this period despite a projected loss of 1,200 jobs in the lumber and wood products industry. Non-manufacturing employment is projected to increase by 266,000 jobs (20%) between 2000 and 2008 in Oregon, with almost half of this growth occurring in the services industry (31%). Most of this growth is expected to come in the business services, private health care, and social services industries. Further, the number of jobs in wholesale and retail trade is projected to expand by 18.9%, or 72,500 jobs by 2008. Most of this growth is expected in wholesale trade and restaurants.

By contrast, Coos and Curry Counties are expected to experience slower growth in all industries when compared with the rest of Oregon. This region has the slowest projected growth rate of any region in the state according to the Oregon

Employment Department. This slow growth rate is attributable to expected reductions in natural resource related industries. Non-manufacturing employment in Coos and Curry counties is projected to grow by 10% by 2008. Most of this growth is expected to occur in trade and service related industries. In this respect, growth in the South Coast region is projected to roughly mirror statewide employment trends. Table 2-3 below shows employment by sector for Curry County between 1987 and 1998.

**Table 2-3: Employment by Sector, Curry County 1987-1998**

	1987	1988	1989	1990	1991	1992	1993	1994	1995	1996	1997	1998	90-98 % Change
<b>Population</b>	17200	18400	19200	19400	20500	21400	21300	22000	22200	22000	22200	22000	13%
<b>Total Manufacturing</b>	1210	1270	1200	1020	970	860	870	860	850	850	890	880	-14%
Lumber & Wood Products	1070	1080	930	730	680	650	640	630	630	630	650	640	7%
Food and Kindred Products	50	70	130	150	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Other Manufacturing	100	120	140	150	290	210	230	230	220	220	240	240	60%
<b>Total Nonmanufacturing</b>	3790	4060	4460	4670	4680	4640	4720	4970	5170	5170	5170	5220	12%
Mining and Construction	270	290	300	310	340	290	320	350	350	350	360	380	23%
Trans., Comm., & Utilities	190	210	240	250	230	230	240	240	260	260	250	260	4%
Trade	1230	1340	1490	1530	1540	1520	1530	1730	1800	1800	1790	1790	17%
Finance, Ins., & Real Estate	250	270	290	290	280	290	320	330	330	330	330	310	7%
Services	760	810	890	950	980	1000	1040	1050	1110	1110	1130	1200	26%
Government	1090	1140	1250	1340	1310	1300	1280	1270	1310	1310	1300	1290	-4

Source: Oregon Employment Department 1999

## Recent Development Trends

The following is an overview of available data describing existing development patterns in Gold Beach, from which possible trends about the form new development will assume in the coming twenty-years can be discerned.

Table 2-4 below shows the number of building permits issued between 1995 and 2000. Data on building permits are only available since 1995. This data indicates that there hasn't been a great deal of building activity in Gold Beach in the last five years. The City issued about 100 permits for residential construction over the six-year period, or about 17 per year. Residential building activity, in addition, has been confined to the construction of single-family homes and permits for manufactured home placements. More than two-thirds of the permits issued were for manufactured home placements. No permits were issued for multiple-family dwellings. The City also issued five permits for new commercial construction during this period.

**Table 2-4: Building permits issued for new residential construction, City of Gold Beach 1995-2000**

Year	Site build Single-family Permits Issued	Manufactured Home Placements	New Commercial
1995	3	25	1
1996	7	10	0
1997	6	13	1
1998	4	9	1
1999	7	8	0
2000	4	5	2
<b>Total</b>	<b>31</b>	<b>70</b>	<b>5</b>

Source: City of Gold Beach

Table 2-5 shows housing units by type in Gold Beach for 1990. The housing stock in Gold Beach is primarily composed of single-family detached housing, apartments, and manufactured homes.



**Table 2-5: Housing Units in Gold Beach by type 1990**

Housing Units	Number	Percent
Total housing units	773	100%
Single-family detached	428	55%
Single-family attached	15	2%
Multiple family	196	25%
Manufactured/Mobile	134	17%

Source: 1990 U.S. Census

The 2000 Census indicates that Gold Beach had 987 housing units in 2000, or 214 more than in 1990. Of those, about 84% were occupied, and 16% were vacant. About 3% of vacant units were seasonal, recreational, or occasional use. Of the 829 occupied units, about 66% were owner-occupied and 34% were renter-occupied.

**Table 2-6. Housing by tenure, Gold Beach, 2000**

Variable	Number	Percent
Total Housing Units	987	100.0%
Occupied housing units	829	84.0%
Owner-occupied housing units	550	55.7%
Renter-occupied housing units	279	28.3%
Vacant housing units	158	16.0%
For seasonal, recreational, or occasional use	29	2.9%

Source: Census 2000

CPW also reviewed relevant city policy pertaining to development and looked at average residential densities to develop an understanding of the residential development patterns. We also used the results of this analysis to make assumptions about the average densities of future residential development and the residential land need that this would entail. Residential land in Gold Beach is classified into three plan designations:

- 1-R low-density residential zoning: includes single-family residences, manufactured homes, and farming if lot is larger than an acre. Duplexes are allowed as a conditional use.
- 2-R medium-density residential zoning: includes single-family dwellings, manufactured homes, and farming allowable uses. Duplexes are allowed as a conditional use.

- 3-R high-density residential zoning: includes single-family dwellings, duplexes, manufactured homes, and multiple family dwellings are allowed outright. Farming is allowed if lot is greater than an acre.

Using data from Curry County Assessment records, CPW estimates residential development in Gold Beach has occurred at the following densities (based on analysis of assessment data for all developed residential tax lots in Gold Beach):

- 1-R: 3.0 DU/Net Acre
- 2-R: 1.2 DU/Net Acre
- 3-R: 4.2 DU/Net Acre

Not surprisingly, residential development in Gold Beach has not occurred at high densities. The City has substantial areas with slope constraints that preclude high-density development.

Another indicator of housing demand is vacancy rates. Vacancy rates tend to be cyclical and follow local economic trends. The most recent data pertaining to vacancy rates in Gold Beach at this time is that provided in the 2000 U.S. Census. According to the Census, the residential vacancy rate in Gold Beach was 16%. This is a 4% increase over the 1990 rate of 12%. Only 3% of vacant units in 2000 were for seasonal or recreational use.

In summary, the City of Gold Beach has not grown substantially in the past ten years. The population has actually grown by 24% between 1990 and 2000, however, this is mostly attributable to the annexation of the Hunter Creek area south of City in 1995. Further, population growth in Curry County has been projected to occur due to in migration from other areas. There has been no substantial development in Gold Beach during 1990's either, the city having approved only 32 building permits between 1995 and 2000, all of which were for single-family detached housing. Single-family detached housing currently makes up 55% of the housing stock in Gold Beach.

# Chapter 3

## Demand for Land

This chapter presents estimates of demand for land in Gold Beach over the next 20 years. Demand is evaluated in the three general land use categories we are using for this study: (1) residential land, (2) commercial and industrial land, and (3) public and institutional land.

### Demand for Residential Land

#### Population Forecasts

Demand for residential land is derived from a demand for new housing which in turn is a function of population growth. CPW assumed that the City's coordinated population forecast of 3,018 is a reasonable approximation of the city's population in 2020. More specifically:

- The population of Gold Beach in 1990, according to the 1990 U.S. Census was 1,546.
- The population of Gold Beach, as given in the 2000 U.S. Census, was 1,897 individuals.
- The forecasted population in Gold Beach in 2020, as given in the city's coordinated population forecast, is 3,018 persons. Using this figure as our base case forecast for this analysis, the forecasted population growth between 2000 and 2020 in Gold Beach will be 1,121 persons.

#### Housing Forecast and Residential Land Need

Demand for new housing is forecast by first converting population growth into households by making an assumption about average household size over the planning period. This number of new households is then assumed to equal the estimated number of new housing units that are needed to accommodate the city's forecasted population growth. This is then inflated by a vacancy factor to account for vacant or seasonal units. This simple relationship satisfies state requirements and is based on the methods described in the state's HB 2709 Workbook, *Planning for Residential Growth: a Workbook for Oregon's Urban Areas*.

Table 3-1 shows the assumptions and results of CPW's estimate of the number of needed dwelling units over the twenty-year planning period.

The number of new people added to the population over the next twenty years (1,121) is converted to an estimate of needed dwelling units by first subtracting out the number of those individuals to be housed in group quarters (i.e., assisted living facilities, jails, etc). This value is then divided by average household size (2.3 persons per household) to estimate the number of occupied housing units that are needed (483). Finally, an assumption about the vacancy rate (8%) in Gold Beach is factored in to obtain a value for new housing demand over the next twenty years. CPW estimates Gold Beach will require 525 new dwelling units between 2000 and 2020.

**Table 3-1: Needed Dwelling Units, Gold Beach UGB 2000-2020**

Variable	Value
Change in persons, 2000-2020	1,121
-Change in persons in group quarters	10
=Persons in households	1,111
÷Persons per occupied DU	2.30
=Occupied dwelling units	483
/(1-vacancy rate)	92.0%
<b>=Total needed dwelling units</b>	<b>525</b>

Source: CPW. 2001

## Residential Land Need

The next step in the analysis is to convert new housing units to residential acres. This is determined by making assumptions about the housing mix (e.g., single-family and multiple-family), and the average density of each housing type.

As a starting point for this analysis, we first developed an assumption about the probable mix of new housing development in Gold Beach by type. Data available from the 1990 U.S. Census for Gold Beach, as well as building permit data since 1995, are presented in chapter 2 of this report.

The 1990 Census distinguished between single-family detached, single family attached, multiple family, and manufactured home housing types. For this analysis, we distributed our estimate of needed dwelling units between the housing types identified in the Gold Beach zoning code. These types are listed as follows:

- *Single family*: detached structures of conventional construction containing a single dwelling unit. We further distinguished between detached single-family dwellings and manufactured homes in this category.

- *Multiple-family*: Structures containing three or more dwelling units. Again, we further divided this category between apartments and duplexes. Duplexes are identified in the zoning code, and we included them as multi-family housing.

In 1990, housing in Gold Beach was composed of 72% single-family housing, and 28% multiple-family housing. A review of building permit records, again only available since 1995 indicates the vast majority of housing built has been in the form of single-family housing. On the basis of this data, we assume a housing mix over the planning period of 80% single-family/20% multi-family.

On the basis of this information, and after reviewing the allowable densities in each zone, CPW assumed development will occur at the following densities:

- Single-family detached: 3.0 DU/gross acre
- Manufactured: 4.5 DU/gross acre
- Duplex: 6.0 DU/gross acre
- Apartment: 8.0 DU/gross acre

Having made the above assumptions about housing mix and average residential density by plan designation, we are able to come to the following estimates of gross land need and dwelling unit distribution by type, as shown in table 3-2.

**Table 3-2: Allocation of Housing Units by type and Land Need, Gold Beach UGB, 2000-2020**

Housing type	Number of DU	Percent of DU	Density (DU/Gross Residential Acre)	Land Need (Gross Acres)
<b>Single-family</b>	<b>420</b>	<b>80%</b>	<b>3.5</b>	<b>119.6</b>
Detached	236	45%	3.0	78.7
Manufactured	184	35%	4.5	40.9
<b>Multifamily</b>	<b>105</b>	<b>20%</b>	<b>7.6</b>	<b>13.8</b>
Duplex	16	3%	6.0	2.7
Apartment	89	17%	8.0	11.1
<b>Total</b>	<b>525</b>	<b>100%</b>	<b>3.9</b>	<b>133.3</b>

Source: CPW, 2001

As is shown in Table 3-2, CPW allocated 80% of the total number of needed dwelling units to single-family housing, and 20% to multi-family. Of this distribution, 45% of total is single-family detached housing, and 35% to manufactured housing. This distribution is roughly

consistent with current development patterns. For multiple-family, CPW allocated 17% to apartments and 3% to duplexes.

Our estimates for the amount of land, in acres, needed to accommodate the new development projected above is also shown in Table 3-2. These figures were determined by allocating needed housing units by residential plan designation and applying our assumptions about the achievable densities in these designations based on our review of the City’s existing zoning ordinances. Our allocation of housing units by plan designation is shown in Table 3-3 below.

**Table 3-3. Estimated housing need by type and plan designation, Gold Beach UGB, 2000-2020**

Housing type	Plan Designation			Total
	R-1	R-2	R-3	
Single-family				
Detached	25%	15%	5%	45%
Manufactured	20%	10%	5%	35%
Multifamily				
Duplex		2%	1%	3%
Apartment		5%	12%	17%
<b>Total</b>	45%	32%	23%	100%

Source: CPW, 2001

CPW projects that most housing built in Gold Beach will be developed in the form of single-family dwellings, and as such, most projected development is allocated to the 1-R plan designation. Table 3-4 shows of the amount of land needed in each residential plan designation to accommodate the allocation of housing in Table 3-3.

CPW projects that the city of Gold Beach will need about 133.3 gross buildable acres of land in all residential plan designations to accommodate new housing demand over the next twenty-years. Of this total, approximately 70 gross buildable acres will be needed in the low-density residential designation, approximately 43 gross buildable acres in the medium-density designation, and approximately 23 gross buildable acres in the high-density plan designation.

**Table 3-4: Land Need by Housing Type and Plan Designation**

Housing type	Plan Designation			Total
	Low Density	Medium Density	High Density	
Single-family				
Detached	43.8	26.3	8.8	78.9
Manufactured	23.3	11.7	5.8	40.8
Multifamily				
Duplex	-	1.8	0.9	2.7
Apartment	-	3.3	7.9	11.2
<b>Total</b>	67.1	43.1	23.4	133.3

Source: CPW 2001

## Demand for Non-Residential Land

The analysis of land need in Gold Beach is divided into two parts: residential and non-residential land need. The analysis of non-residential land is further divided between commercial and industrial, and public/institutional lands. CPW's methods for forecasting land need for each sub-category are the same: a ratio analysis that assumes that demand for these types of land is a function of population growth.

### Commercial and Industrial Land Need

For larger communities, analysis of demand for commercial and industrial land would be based on projections of employment by sector. Land need is estimated by translating employment growth by sector by making assumptions about employees per acre for each industry.

Unfortunately, sector-level employment forecasts are not available for Gold Beach. For this analysis, CPW calculated the present ratio of developed commercial and industrial land per 1000 people in Gold Beach and applied it to the City's 2020 population forecast to estimate commercial and industrial land demand over the planning period.

Using Curry County Tax Assessor's data, CPW estimates that there were 169.45 acres of developed commercial land, and 26.85 acres of developed industrial land within the Gold Beach UGB in 2000. Using the Census 2000 population of 1,897 persons, the ratio of commercial land in Gold Beach was 89.3 acres per 1000 persons, and 14.2 acres per 1000 persons for industrial lands.

CPW's estimates of commercial and industrial land need are presented in table 3-5. Assuming that there will be 3,018 individuals residing in Gold Beach by the year 2020, and that population will have grown by 1,121 individuals, we project that the City will need approximately 100 acres of commercial land, and about 16 acres of industrial land within its UGB to accommodate the City's forecasted population growth.

**Table 3-5: Forecast of Commercial and Industrial Land Need, Gold Beach UGB, 2000-2020**

Use	Developed Acres	Acres/1000 residents	Land Need (acres)
Commercial	169.45	89.33	100.13
Industrial	26.85	14.15	15.87

Source: CPW, 2001

## Public/Institutional Land Need

As population increases, demand for schools, parks, churches, governments, hospitals, and other such facilities will expand as well. Many communities have specific standards for allocating land for public and institutional uses. In Gold Beach, increases in demand for land devoted to these general kinds of uses will be accommodated primarily on land designated for residential uses, but could also occur on lands designated for other uses. Specifically, public and institutional land uses can be accommodated on lands designated for residential, commercial, and industrial uses, in addition to lands devoted for public facilities according to the Gold Beach zoning code.

CPW forecasted public/institutional land demand by applying the ratio method described in the methods section. Using tax assessor's records for Curry County, CPW estimates that there were 73 acres of land within the Gold Beach UGB that is classified as exempt.<sup>3</sup> CPW estimates the ratio of public/institutional land in Gold Beach to be 38.7 acres per 1000 persons. Assuming that 1,121 people will be added to the City's population by the year 2020, we forecast demand for 43.3 acres for public and institutional uses.

## Summary

Table 3-6 summarizes land needs for all plan designations in Gold Beach. CPW estimates the City will require 426.2 gross buildable acres in all land types to accommodate growth between 2000 and 2020. Of this total, CPW projects the City will need 133 acres of residential land, 100 acres of commercial land, 15.9 acres of industrial land, and 43 acres of public/institutional land to accommodate growth over the next twenty years.

<sup>3</sup> Exempt lands have a property classification in the Curry County Assessment database in the 900s. These lands are exempt from property taxes and include lands owned by government and non-profit organizations. We used properties in the 900 classifications as a proxy for public and semi-public lands.



**Table 3-6: Summary of Total Land Need  
Gold Beach, 2000-2020**

<b>Use Type</b>	<b>Land Need (Acres)</b>
<b>Residential</b>	
Single Family	
Detached	78.9
Mobile Home	40.8
Multiple Family	
Duplexes	2.7
Apartments	11.2
<b>Subtotal</b>	133.3
<b>Commercial</b>	100.1
<b>Industrial</b>	15.9
<b>Public/Institutional</b>	43.3
<b>Total</b>	426.2

Source: CPW, 2001



# Chapter 4

## Buildable Lands Inventory

Chapter four presents CPW's inventory of buildable land in Gold Beach. The inventory is based on Curry County assessment data from the Fall of 2000. CPW analyzed Gold Beach's buildable land supply in a number of ways: by development status (classification); by plan designation; by location within the Urban Growth Boundary; by zoning; by land use; and by tax lot size.

This chapter presents CPW's estimates of the number of vacant acres of commercial, industrial, and residential land that currently exists within Gold Beach's Urban Growth Boundary. Our estimate of the amount of vacant land that is constrained by natural features like steep slopes or floodplains is presented at the end of this chapter, along with an estimate of the amount of vacant buildable land available within the Gold Beach UGB.<sup>4</sup>

### Vacant Land by Classification

Table 4-1 shows land within the Gold Beach UGB by classification. As a first step in the buildable lands inventory, CPW classified tax lots into a set of mutually exclusive categories: airport activities, conservation, developed, partially vacant, and vacant.

CPW estimates that there are approximately 2,925 acres of land on 2132 tax lots within the Gold Beach UGB. CPW estimates that 1,261 tax lots within the City UGB are developed on approximately 822 acres. This represents 28% of Gold Beach's current land supply. Considering lands devoted to airport use, conservation, and public facilities—lands that are not available for future development—CPW estimates 1,093 acres within the Gold Beach UGB are unavailable for future residential, commercial, and industrial use. This represents 37% of Gold Beach's land supply.

CPW estimates that 672 tax lots in Gold Beach are vacant, encompassing 1,498 acres of land. Land that we have classified as vacant make up half (51%) of the City's land supply.

Finally, we classified 333 acres within the UGB as partially vacant. Lots were classified as partially vacant if they had some improvement value, usually in the form of a single dwelling, but were more than an

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<sup>4</sup> City policy presently does not prohibit development on many constrained lands. For example, much of the City is in areas with significant slopes. The City allows development on sloped land, provided the developer can demonstrate the site can safely be developed. Thus, slope does not provide an absolute development constraint. Development in sloped areas, however, typically occur at lower densities.

acre in size. We assumed that development on these tax lots consumed half an acre, with the remainder of the lot being vacant. Of the 333 total acres CPW classified as being partially vacant, 53 acres were classified as fully developed, and about 280 acres were considered vacant. Thus, a total of 1,778 acres within the Gold Beach UGB were classified as vacant, of 61% of the total land base within the UGB.

**Table 4-1: Land by Classification, Gold Beach UGB**

Classification	Number of		Developed/	Vacant
	Tax Lots	Total Acres	Unavailable Acres	Acres
Airport Activity	8	87.7	87.7	0.0
Conservation	18	40.0	40.0	0.0
Developed	1,261	822.9	822.9	0.0
Public Facility	65	143.0	143.0	0.0
Partially Vacant	108	333.0	53.5	279.5
Vacant	672	1,498.5	0.0	1,498.5
<b>Total</b>	<b>2,132</b>	<b>2,925.1</b>	<b>1,147.1</b>	<b>1,778.0</b>

Source: CPW 2001

Adding the 53 acres considered developed on parcels classified as partially vacant land yields an estimate of 876 acres of developed land within the UGB. Developed land makes up approximately 30% of the City's land supply. The remainder of land in Gold Beach (9%) is devoted to Airport activities, conservation, and public facilities. Because these lands are considered unavailable for future development as commercial, industrial, residential, and public uses, 1,147 acres (about 39%) of the land within Gold Beach's inventory can immediately be considered unavailable for future development.

## Land by Plan Designation

Tables 4-2 shows land within the Gold Beach UGB by Comprehensive Plan designations. Of the 2925 acres within the Gold Beach UGB, approximately 1,789 acres are designated for residential use in the City's comprehensive plan. This represents about 61% of the city's total land base. CPW has identified 74%, or 1,329 acres, of the land devoted to residential uses in Gold Beach as vacant.

A little over 800 acres is designated for commercial and industrial uses. This comprises approximately 29% of the land within the UGB. About 198 acres of industrial land, which is slightly less than half of the City's industrial land, is classified as vacant in this inventory. Similarly, a little over half of the commercially designated land according to the comprehensive plan is vacant.

**Table 4-2: Land by Plan Designation, Gold Beach UGB**

<b>Plan Designation</b>	<b>Tax Lots</b>	<b>Total Acres</b>	<b>Developed/ Unavailable Acres</b>	<b>Vacant Acres</b>
Airport Activity	8	87.7	87.7	0.0
Commercial	482	404.0	170.6	233.5
Conservation	18	40.0	40.0	0.0
Industrial	32	432.6	234.8	197.8
Marine Activity	28	28.9	10.9	18.0
Public Facility	65	143.0	143.0	0.0
Residential	1499	1,788.9	460.2	1,328.7
<b>Total</b>	<b>2132</b>	<b>2,925.1</b>	<b>1,147.1</b>	<b>1,778.0</b>

Source: CPW, 2001

As shown in Table 4-3, about half of the land within the Gold Beach UGB is located within the Gold Beach city limits, the other half being located in the Urban Growth Area between the city limits and the UGB. More than half (58%) of land classified as vacant within the Gold Beach UGB is located within the Urban Growth Area.

Slightly more than half of the land within the Gold Beach city limits is classified as vacant. About 70% of this vacant land is designated for residential uses, with 20% designated for commercial uses. Within the Urban Growth Area, 70% of the land is classified as vacant. Again, most of this vacant land is designated for residential uses, and in roughly the same proportion as exists within the City Limits. The majority of the vacant industrial land is in the Urban Growth Area.

**Table 4-3: Land by Plan Designation, City Limit and UGB**

<b>Plan Designation</b>	<b>Tax Lots</b>	<b>Total Acres</b>	<b>Developed/ Unavailable Acres</b>	<b>Vacant Acres</b>
<b>City Limit</b>				
Commercial	388	275.1	128.2	147.0
Industrial	24	109.4	33.3	76.1
Residential	941	832.0	310.0	522.5
Other	88	245.0	235.4	9.6
<b>Subtotal</b>	<b>1441</b>	<b>1461.6</b>	<b>706.9</b>	<b>755.2</b>
<b>Urban Growth Area</b>				
Commercial	94	128.9	42.4	86.5
Industrial	8	323.1	201.5	121.6
Residential	558	956.9	150.2	806.2
Other	31	54.6	46.1	8.5
<b>Subtotal</b>	<b>691</b>	<b>1463.5</b>	<b>440.2</b>	<b>1022.8</b>
<b>Total</b>	<b>2132</b>	<b>2925.1</b>	<b>1147.1</b>	<b>1778.1</b>

Source: CPW, 2001

## Land By Zoning

Table 4-4 shows land according to classification, zoning, and location within the Gold Beach UGB. Analysis of the City's inventory of land by zoning reveals that most of the vacant residential land within the UGB is zoned for medium-density residential uses (59% of the vacant residentially-zoned land within the City Limits, and 80% within the Urban Growth Area). This residential zone actually has the lowest observed densities of the City's three residential zones.

Additionally, there are approximately 78 acres of land that have been classified as vacant and which are zoned commercial within the Gold Beach City Limits. There are 28.5 acres of vacant commercially zoned land within the urban growth area. About 58 acres of vacant land within the City Limits have been zoned industrial, making up 8% of the zoned land within Gold Beach. A little over 120 acres of vacant land have been zoned for industrial use within the urban growth area. This sum constitutes 12% of the zoned land in this inventory.

**Table 4-4: Land by Zoning, Gold Beach UGB**

<b>Zone</b>	<b>Tax Lots</b>	<b>Total Acres</b>	<b>Developed/ Unavailable Acres</b>	<b>Vacant Acres</b>
<b>City</b>				
No Zone	94	46.9	26.6	20.3
1C	1	8.4	0.0	8.4
1R	272	173.4	78.7	94.7
2R	229	402.3	145.3	257.0
3R	364	152.8	68.2	84.6
4C	341	162.2	112.6	49.6
C1	6	29.4	8.8	20.6
CN	21	60.7	0.0	60.7
ER	1	5.7	0.0	5.7
FG	5	72.0	0.0	72.0
I	9	81.4	23.6	57.8
MA	16	10.3	0.8	9.6
NH	10	32.7	19.2	13.6
PF	71	222.7	222.7	0.0
RR	1	0.7	0.0	0.7
<b>Subtotal</b>	<b>1441</b>	<b>1461.6</b>	<b>706.4</b>	<b>755.2</b>
<b>Urban Growth Area</b>				
No Zone	38	205.9	193.5	12.4
1C	3	5.0	0.0	5.0
1R	277	165.6	36.7	128.9
2R	253	673.2	98.9	574.3
3R	2	21.7	0.0	21.7
C1	83	60.6	37.1	23.5
ER	8	46.3	5.3	41.0
FG	7	88.7	1.5	87.2
I	5	163.9	43.5	120.4
MA	12	18.6	10.1	8.5
PF	2	8.0	8.0	0.0
RR	1	6.1	6.1	0.0
<b>Subtotal</b>	<b>691</b>	<b>1463.5</b>	<b>440.7</b>	<b>1022.8</b>
<b>Total</b>	<b>2132</b>	<b>2925.1</b>	<b>1147.1</b>	<b>1778.0</b>

Source: CPW, 2001

## Developed Land by Use

CPW analyzed developed land within the Gold Beach UGB according to actual use. Table 4-5 presents land uses in Gold Beach, the number of developed parcels, the total number of acres encompassed by tax lots classified as developed and partially developed, and the number of developed acres on partially vacant parcels.

**Table 4-5: Developed and Partially Developed Parcels by Land use, Gold Beach UGB, 2000**

Land Use	Number			
	of Tax Lots	Total Acres	Developed Acres	Vacant Acres
Airport	10	87.7	0.0	0.0
Commercial	182	169.5	165.3	0.0
Conservation	1	46.6	0.0	46.6
Exempt	38	73.3	13.0	0.0
Industrial	5	26.9	26.9	0.0
Multiple-family residential	120	50.6	31.1	19.5
Mobile Home	129	0.0	0.0	0.0
Residential	922	900.7	639.6	260.4
<b>Total</b>	<b>1,407</b>	<b>1,355.3</b>	<b>876.0</b>	<b>326.5</b>

Source: CPW, 2001

## Vacant and Partially Vacant Land

Table 4-6 shows vacant and partially vacant land in Gold Beach by plan designation. Parcels that already have development but are underutilized given current plan designations and zoning should be included as a portion of Gold Beach's vacant land supply.

CPW identified about 3.7 acres of vacant commercial land is located on parcels that have been classified as partially vacant. This represents about 2% of Gold Beach's vacant land supply.

A fairly significant portion of Gold Beach's vacant residential land supply as identified in this inventory is found on partially vacant residential land. CPW identified 275.8 acres of vacant residential land on land classified as partially vacant. This constitutes about 21% of the vacant residential land supply within the Gold Beach UGB. While we identified these sites as partially vacant, many are probably constrained and difficult to build on.

**Table 4-6: Vacant and Partially Vacant Land by Plan Designation, Gold Beach UGB**

Plan Designation	Tax Lots	Total Acres	Developed Acres	Vacant Acres
<b>Partially Vacant</b>				
Commercial	5	6.2	2.5	3.7
Residential	103	326.8	50.6	275.8
<b>Vacant</b>				
Commercial	159	229.8	0.0	229.8
Industrial	16	197.8	0.0	197.8
Marine Activity	18	18.0	0.0	18.0
Residential	479	1052.9	0.0	1052.9
<b>Total</b>	<b>780</b>	<b>1831.5</b>	<b>53.1</b>	<b>1778.0</b>

Source: CPW, 2001



## Vacant Land by Lot Size

Lot size is an important variable in evaluating a community's vacant land supply. CPW has analyzed vacant land in Gold Beach in various lot size classes. Table 4-7 shows vacant land in Gold Beach by lot size and plan designation. Vacant parcels were divided into eight size classes, the smallest being lots less than an acre in size, the largest being lots larger than an acre.

As shown in Table 4-7, most vacant commercial land is distributed on two to five fairly large tax lots between 20 and 50 acres in size. Similarly, Gold Beach has large vacant sites zoned for industrial use. Of the approximately 198 acres of vacant industrial land CPW has identified within the Gold Beach UGB, about 61% is accommodated on tax lots greater than 50 acres in size.

Lastly, most vacant residential land within the UGB is fairly evenly distributed on parcels larger than five acres in size. Of the 1052.8 acres of vacant residential land in this inventory, approximately 70% is composed of parcels greater than 5 acres in size. 20% is composed of parcels larger than 50 acres in size, 19% on parcels between 20 and 50 acres in size, and 17% on parcels between 10 and 20 acres.

**Table 4-7: Vacant Land by Lot Size, Gold Beach UGB**

Size by Plan Designation (Acres)

Comprehensive Plan Designation	<0 - 0.5	0.5 - 0.9	1.0 - 1.9	2.0 - 4.9	5.0 - 9.9	10.0 - 20.0	20.0 - 50.0	50.0 +	Total Acres
Commercial	15.1	18.7	8.5	39.3	27.7	16.0	104.6	0.0	229.8
Industrial	0.6	0.8	3.4	6.7	0.0	29.9	36.4	120.0	197.75
Marine Activity	0.9	4.1	5.6	7.5	0.0	0.0	0.0	0.0	18.04
Residential	54.5	48.7	47.1	129.9	176.3	183.8	202.0	210.6	1052.89

Source: CPW, 2001

## Constrained Lands

A key issue in identifying buildable lands is netting out lands that have physical or policy constraints. Constraints that are typically considered in buildable lands inventories include:

- Wetlands
- Riparian areas and shorelines
- Steep slopes
- Geological hazards
- Tsunami inundation
- Floodplains and floodways

Not all of these lands are undevelopable. For example, many cities allow development in floodplains consistent with the National Flood

Insurance Program (NFIP) requirements. Thus, the inventory should differentiate between absolute constraints (constraints backed by policy that preclude development) and partial constraints (constraints that do not preclude development but will likely require development at lower densities).

The City's Comprehensive Plan does not include an estimate of the number of acres constrained by steep slopes or floodplains. Rather, it estimates development potential on constrained lots in several sub-areas of the City. The maps included in the plan are not of a scale that is adequate to estimate slope or floodplain constraints. Moreover, the City does not outright prohibit development in these areas at this time. Thus, development potential exists, but development will probably occur at lower densities on constrained lands.

# Chapter 5

## Comparison of Land Supply and Demand

### Introduction

Chapter five summarizes data and analysis presented in chapters three and four to compare “demonstrated need” for vacant buildable land with the supply of such land currently within the Gold Beach UGB.

Estimates for land demand for those land types identified in the City’s comprehensive plan are compared with the inventory of vacant buildable land in each plan designation to determine if any surpluses or deficits of buildable land exist. This information is used to determine if an expansion of a city’s urban growth boundary is necessary and justifiable.

### Comparison of Supply and Demand

Table 5-1 shows a comparison of supply and demand for land within the Gold Beach UGB over the next twenty years. The demand analysis presented in Chapter 3 presented our base estimate of need for residential, commercial, industrial, and public/institutional land between 2000 and 2020: 357 vacant buildable acres in all plan designations. CPW’s analysis of Gold Beach’s vacant land supply, presented in Chapter 4, determined that there were 1,760 vacant acres of land within the Gold Beach UGB in 2001.

It is important to note that the city of Gold Beach does not have a plan designation for public or institutional lands. As such, CPW was not able to determine the number of vacant acres of public and institutional lands available within the UGB using tax assessor’s information, which formed the basis of this study. CPW assumes that demand for these lands over the planning period will be met by land in other plan designations, as is allowed according to the City Zoning Code. A further analysis of the comparison of land need and supply shown in Table 5-1 leads to the following conclusions:

- The City of Gold Beach’s inventory of vacant land exceeds CPW’s estimates of land need within the UGB between 2000 and 2020.
- The City of Gold Beach has a surplus of land in all plan designations to accommodate forecasted demand.
- The City has a surplus of 1131 acres of vacant land in the residential plan designation.

- The City has a surplus of 133 acres of land in its commercial plan designation.
- Gold Beach has a relatively large surplus of land in its industrial plan designation. As shown in Table 5-1, the City has 198 acres of vacant industrial land, compared with a forecasted demand for 16 acres of developable land in this designation, leaving a surplus of 182 acres, approximately.

In summary, the City of Gold Beach has a large surplus of vacant land, especially in its residential plan designation. The nature of the Gold Beach topography would dictate that these vacant lands would probably not be used for other purposes, however.

**Table 5-1: Comparison of Land Supply and Demand, Gold Beach UGB, 2000-2020**

<b>Plan Designation</b>	<b>Number of Tax Lots</b>	<b>Total Acres</b>	<b>Vacant Acres</b>	<b>Total Needed Acres 2000-2020</b>	<b>Surplus (Deficit)</b>
Residential	1499.0	1788.9	1328.7	197.6	1131.1
Commercial	482.0	404.0	233.5	100.13	133.4
Industrial	32.0	432.6	197.8	15.87	181.9
Public/Institutional	N/A	N/A	N/A	43.32	-43.32
<b>Total</b>	2013.0	2625.5	1760.0	356.9	1403.0

Source: CPW, 2001

# Appendix A: Parcel Database

Appendix A contains printouts of the parcel database CPW used to conduct the buildable lands inventory. The database was provided by the Curry County Assessor. CPW annotated the database to include information on land classification, and other key variables important to the buildable lands inventory.



# Appendix B: Assessment Index Maps

Appendix B contains a set of annotated index maps from the Curry County Assessor. CPW used the maps to classify parcels and annotate the assessment database. The maps are organized by index number.