-Study Area map

- Study area includes five communities along Highway 22 and the North Santiam River from Lyon/Mehama in the west to Idanha in the east

-Combined Population Slide

- Table shows the population trends over the last 15 years, as compiled by the Portland State University Population Research Center (PRC)

- The 15-year period from 2000 to 2015 saw low to negative growth in the study area. It's important to note that this period includes the Great Recession.

- Positive growth was concentrated in the western part of the study area, which benefits from proximity to the population and economic centers of the Willamette Valley and the I-5 corridor.

- The eastern communities of Detroit and Idanha saw negative growth. We assume this relates to the closing of mills in Idanha

-Growth projections with Augmented Sewer (growth chart)

- Table shows projected population growth for the 5 communities over 20 years from the most recent certified population count (2015 to 2035) using growth rate projections generated by the PRC and certified by Marion County.

- **Population with Baseline 2035** – this is the population growth projection under existing conditions (no sewer in the study area, except for Mill City) over 20 years

- **Augmented Growth Rate** assumes 190% increase over the base rate due to the availability of sewer. This rate was derived from research completed by MFA and the County into comparable communities (based on size, proximity to state highway and basic geographic location) that put in sewer systems over the past 15 years (2000 – 2015).

- In the augmented projection, sewer is in place throughout the study area in year 10 (2025), making a conservative assumption that it takes approximately 10 years to design, permit and construct.

-Employment Growth

- Table shows the employed portion of the population, as known in 2015 and projected forward using County approved growth projections.

- The overall statewide average employment rate is 42% in Oregon, which is consistent with national trends. This means that 42 of every 100 Oregonians is formally employed.

- In the study area, this rate is 25%. The growth projections for the 20 period shown reflect this lower rate.

- Baseline reflects the population growth rate under existing conditions; Augmented shows growth rate reflecting a sewer system installed in 2025.

-Industrial and Commercial Inventory

- This is a summary of the total population of commercial and industrial properties in the study area, sorted by typology

- There is approximately 107 acres of developed commercial land and 145 acres available to be developed (ignoring redevelopment potential or infill).

- There is approximately 490 acres of developed industrial land in the canyon and 159 acres available to be developed (ignoring redevelopment potential or infill).

- There is plenty of land available, with most communities having sufficient undeveloped or vacant land to meet the forecast needs. Each City should look at the properties they would like to prioritize for development/redevelopment to determine what assistance may be available on a property by property basis.

- Utility access and brownfield status are issues for industrial properties

-Sewer Improved growth potential

- Shows the properties, by typology, that are impacted positively in the redevelopment matrix by the presence of sewer and water. This captures all properties that flip from negative to neutral or positive when utilities are removed as a weighted variable.

- The addition of sewer grows the desirability of much of the commercial and industrial property in the study area. All properties see a boost in their development matrix value (which measures the relative attractiveness of a property to develop). Approximately 25% of the acreage (207 acres) is lifted from a negative to a positive development matrix value, representing a shift from generally undesirable to desirable.

- The presence of sewer has a stronger boost for properties further east in the canyon.