

# THE LOCAL AND REGIONAL ECONOMIC IMPACTS OF PORT OF CAMAS-WASHOUGAL

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## EXECUTIVE SUMMARY

The Port of Camas-Washougal was founded in 1935 by a vote of the people. “It is the mission of the Port of Camas-Washougal to make strategic investments and develop effective partnerships that enhance the community’s quality of life by bringing jobs, infrastructure, and recreational opportunities to East Clark County.”

Located approximately 9 miles east of Portland on the north bank of the Columbia River, the Port of Camas-Washougal operates three lines of business: Airport (Grove Field), Marina (Parker’s Landing), and a Real Estate/Industrial Park. Parker’s Landing Marina was established in 1940. Today the marina offers covered and uncovered moorage for more than 350 vessels, accommodating vessels from 20 feet to 40 feet. Racks for up to ten sixteen-foot kayaks and 30 wave runners or jet skis slips are also available. Guest moorage is located on the breakwater dock for overnight, short term visitors on a first come basis. Vessels up to 45 feet can be accommodated in the guest moorage. A 4-lane public boat launch offers annual as well as daily passes along with a designated parking area for vehicles and trailers. A 24-7 self-service fueling dock offers non-ethanol fuel, 89 octane, and diesel to all boaters at Parker’s Landing Marina. Also located within Parker’s Landing Marina is Riverside Marine and The Puffin Café. Riverside Marine is a locally owned boat repair shop. They are a factory authorized repair center for Mercury, MerCruiser, and Volco Penta, and their certified technicians have over 20 years of experience. Riverside Marine offers a wide variety of boat repair services as well as boat storage. Family owned and operated, the Puffin Café has been serving up Caribbean inspired cuisine since 2002. Moored at the Parker’s Landing Marina, this floating restaurant offers indoor and outdoor seating with magnificent views of the Columbia River and Mt. Hood. The Puffin Café is accessible via land and boat.

Established in 1962 and purchased from Ward Grove, Grove Field is a general aviation airport located 3 miles north of Camas, Washington. Grove Field offers runway 07/25, seventy-seven hangars, 2 commercial hangars, and 14 tie downs for lease at the airport. Available through a card lock system, 100 low lead fuel is available 24-7. Commercial hangar space is also available for those looking to start or expand their business. Also located at Grove Field is FlyIt Academy. FlyIt Academy is a community of pilots passionate about general aviation. Devoted to transforming dreams of flying into reality by teaching the art of aviation, FlyIt Academy has instruction available to flight enthusiasts of all levels. In addition to flight instruction, FlyIt Academy offers mechanic services.

The Port of Camas-Washougal operates a 300-acre industrial park established in 1966 when the United States Army Corp of Engineers created a five-and-a-half-mile levee along the Columbia River. The industrial park is home to more than 60 businesses. The Port provides facilities and services for land, air, and rail-based commerce in order to enhance employment and economic growth. The industrial park falls into one of the key aspects of the Ports mission, which is to stimulate economic development within the Camas-Washougal area. Businesses located in the industrial park represent a diverse group of industries including, retail trade, wholesale trade, manufacturing, construction, and professional services. Roughly half the businesses located in the industrial park are tenants of the Port, while the other half own their land and property or lease from a private third party.

In addition to the activity at Grove Field, Parker’s Landing Marina, and the industrial park, the Port of Camas-Washougal oversees several parks which offer many social and health impacts such as a safe place for celebrations, concerts, gatherings, and community groups. Port parks include the Children’s Nature Play Area, Marina Park, Parker’s Landing Historical Park, Captain William Clark Park, Lewis and Clark Heritage Trail, and Washougal Waterfront Park and Trail.

Martin Associates was retained by the Port of Camas-Washougal to measure the local and regional economic impacts supported by airport, marina, and real estate/industrial park activity at the Port.

In addition to the baseline impact estimates, a computer model specific to the Port of Camas-Washougal marina and real estate/industrial park has been developed. The marina model can be used to test the changes in economic impacts due to changes in the number of sailboats and power boats moored at the Port's facilities, as well as transient operations. In addition, the real estate/industrial park impact model can be used to assess the impacts of potential uses of Port-owned property, including, manufacturing, construction, warehousing, and transportation, as well as other industrial uses. The methodology used in this analysis has been used by Martin Associates to estimate the economic impacts of seaport activity at more than 500 United States and Canadian ports.

PORT OF CAMAS-WASHOUGAL	INDUSTRIAL PARK	GROVE FIELD	PARKER'S LANDING MARINA	TOTAL IMPACTS
<b>JOBS</b>				
DIRECT	1125	23	42	1190
INDUCED	561	13	33	608
INDIRECT	205	17	36	257
<b>TOTAL</b>	<b>1891</b>	<b>53</b>	<b>111</b>	<b>2055</b>
<b>PERSONAL INCOME</b>				
DIRECT	\$58.55M	\$1.62M	\$2.02M	\$62.19M
RE-SPENDING/LOCAL CONSUMPTION	\$46.13M	\$1.28M	\$4.26M	\$51.67M
INDIRECT	\$8.43M	\$1.14M	\$1.39M	\$10.97M
<b>TOTAL</b>	<b>\$113.11M</b>	<b>\$4.04M</b>	<b>\$7.67M</b>	<b>\$124.83M</b>
BUSINESS REVENUE	\$394.29M	\$3.68M	\$7.91M	\$405.88M
LOCAL PURCHASES	\$45.68M	\$1.65M	\$3.91M	\$51.24M
STATE/LOCAL TAXES	\$10.64M	\$380,000	\$722,000	\$11.75M

Exhibit 1: Port of Camas-Washougal Impacts

In 2021, the Port of Camas-Washougal supported the following economic impacts in the local and state economies:

**2,055 total direct, induced, and indirect jobs.** Of the total jobs supported by Port activity, 1,190 are direct jobs, while 608 are jobs supported in the local economy due the purchases of goods and services by the directly employed individuals. As the result of \$51.2 million of local purchases by the businesses located at the marina, airport, and industrial park, an additional 257 indirect jobs are supported.

***A total of \$124.8 million of total wages and salaries and local consumption expenditures are created in the local and regional economy by the activity at the Port of Camas-Washougal.*** The direct job holders received \$62.2 million of direct wages and salaries, for an average salary of \$52,275. As the result of local purchases made by the directly employed individuals, an additional \$51.7 million of local consumption expenditures and induced wages and salaries were created. The 257 indirect job holders received nearly \$11.0 million of wages and salaries.

***Local businesses received \$405.9 million of revenue.*** This revenue is supported from providing services at the Port of Camas-Washougal Parker's Landing Marina activity, Grove Field, as well as the activity supported by the businesses located within the industrial park.

***A total of \$51.2 million of local purchases were made due to the activity at the Port, which supported the indirect jobs.***

***The Port of Camas-Washougal, marina, airport, and industrial park activity supported \$11.7 million of state and local tax revenue.*** Approximately \$10.3 million of state and local taxes were supported in the state of Washington, while roughly \$1.4 million of state and local taxes were supported in the state of Oregon.

***86% of the direct jobs are held by residents of Clark County.*** Table E-1 shows the residency of the 1,190 direct job holders. This distribution of the direct jobs by place of residency is based on data supplied by the individual firms interviewed by Martin Associates as part of the study.

RESIDENCY	SHARE	NUMBER
Camas	23.1%	275
Washougal	23.6%	281
Vancouver	31.2%	371
Other Clark Co.	8.5%	101
Portland	10.4%	124
Other WA	2.7%	32
Other OR	0.5%	6
<b>TOTAL</b>	<b>100%</b>	<b>1190</b>

Table 1: Place of Residency of Direct Jobs

## ECONOMIC IMPACT MEASUREMENTS

The Port of Camas-Washougal retained Martin Associates to measure the local and regional economic impacts generated by activity at the Port, including Parker's Landing Marina, Grove Field, and the industrial park. The impacts are estimated for calendar year 2021.

The purpose of the study is the measurement of economic impacts and includes measuring contributions to the local and regional economies from individual employment and personal income, local and state government tax revenue generation, and business revenue creation. A realistic assessment of the impacts associated with the Port of Camas-Washougal's three lines of business was the study's major emphasis and combines proper economic theory and sound survey techniques with a clear, concise explanation.

During the study, Martin Associates conducted 69 interviews with firms providing services at Parker's Landing Marina, Grove Field, as well as the businesses located in the industrial park. Martin Associates achieved an eighty six percent capture rate. The data collected included employment, payroll, revenue and purchasing information. Thus, the impacts calculated can be traced back to the collected company level detail.

Once collected, Martin Associates used the data collected to develop operational models for Parker's Landing Marina, Grove Field, and businesses located in the industrial park. In addition to the baseline impact estimates, sensitivity impact models have been developed for each of the Port's lines of business: marina, airport, and real estate. The marina model tests impacts resulting from changes in the number of sailboats and power boats moored at the Port's facilities, as well as transient operations. The real estate model can be used to assess the potential impacts of new tenants and to compare alternative uses of port owned real estate in terms of potential economic impact to the local and regional economy.

### 1. Economic Impact Structure

The marina, airport, and industrial park activity contributes to the local and regional economies by providing employment and income to individuals, tax revenues to local and state governments, and revenue to businesses engaged in marina, airport, and industrial park activity. Exhibit 2 illustrates the flows of economic impacts throughout the economy. As this exhibit shows, the marina, airport, as well as the industrial park activity of the Port's real estate tenants, initially create business revenue to the firms providing the services in support of these activities. This revenue is in turn used for several purposes:

- A. To hire employees to provide services or manufacture products
- B. To buy personal goods and services (employee re-spending)
- C. To buy goods or services from other firms (local purchases)
- D. To pay stockholders dividends, retire debt, and invest; and
- E. To pay local, and state taxes.

The hiring of employees generates personal income. This personal income is spent throughout the state, local and national economy to purchase goods and services. This re-spending of income is known as the multiplier effect, which in turn creates induced jobs throughout the economy to the firms providing the goods and services to those directly employed. The firms providing the services to handle the activity at the airport, as well as activity of the recreational boating at the Port's Parker's Landing Marina, purchase local services and goods to support the direct activity. Similarly, the businesses located in the industrial park purchase goods and services from local vendors to support the services and products produced by the businesses located in the industrial park. These purchases by the directly dependent firms and the businesses located in the industrial park generate the indirect jobs. Finally, state and local taxes are paid by those directly employed due to port activity and those employed as a result of the purchases of goods and services by those individuals directly employed and the businesses located in the industrial park.

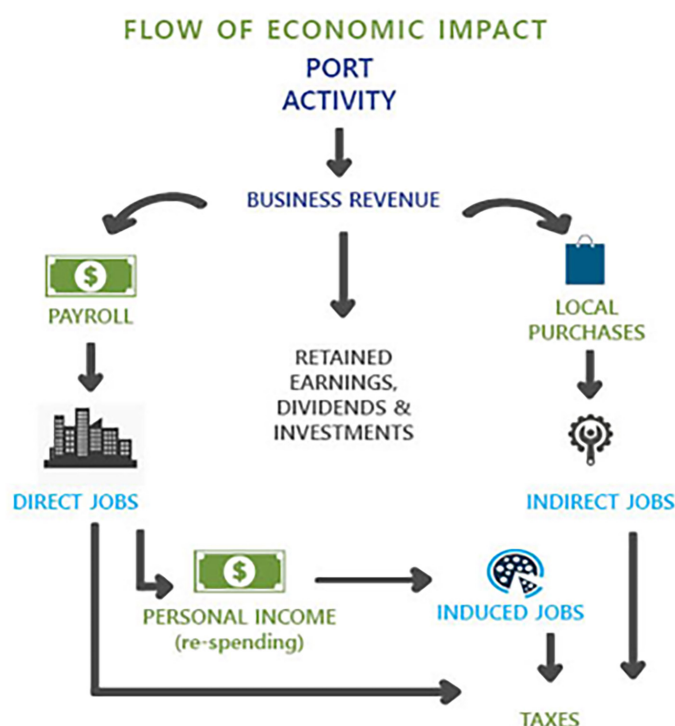


Exhibit 2: Flows of Economic Activity through the Economy

As can be seen from Exhibit 2, and the previous discussion, the flow of economic impacts throughout an economy creates four separate and non additive types of impacts.

These four types of impacts are:

- Employment Impact the number of full time equivalent jobs supported by activity at each the of the Port's primary business units. These impacts consist of jobs directly supported by port activity as well as induced jobs, or jobs created due to the purchase of goods and services by those individuals directly dependent upon port activity. In addition to the direct and induced jobs, indirect jobs, or those jobs supported in the local economy due to the local purchases of goods and services by firms directly dependent upon marina/airport/industrial park activity at the Port of Camas-Washougal.

- Personal Income Impact/Local Consumption Impact the level of earnings associated with the jobs supported by port marina, airport, and associated with the businesses located in the industrial park. Part of the personal income impact is the re-spending of the direct income and adjusted to reflect re-spending throughout the economy. Also included in the personal income impact/local consumption impact is the value of the local purchases by the directly employed job holders. These purchases include purchases for food, apparel, transportation services, housing, and medical services. The value of the local expenditures for these purchases includes the value of the goods and services, as well as the personal income received by those individuals (the induced job holders) providing the goods and services to those directly employed. Thus, the personal income and local consumption impacts include the direct personal income earned by those directly employed due to port activity or by businesses located in the industrial park, plus the value of the local purchases and the portion of the value of the services paid to the induced job holders.
- Revenue Impact the sales generated by firms engaged in servicing the recreational boating activity at the Port's Parker's Landing Marina, the service providers to the general aviation activity at Grove Field are counted as business revenue. In addition, the value of the sales by the businesses located in the industrial park are included as business revenue. This impact includes national as well as local and state revenue.
- Tax Impacts the local and state tax revenues generated by port activity. These are taxes paid by individuals and firms directly dependent upon the marina and general aviation activity, and by the businesses located in the industrial park.

## 2. Data Collection

The Port of Camas-Washougal Economic Impact Study is based on telephone and email interviews with businesses and tenants involved in the three lines of businesses operated at the Port. The Port tenants located at Parker's Landing Marina, Grove Field, and the industrial park as well as non-tenant businesses located in the industrial park were identified from the Port of Camas-Washougal business directory. In addition to data collected from the sources noted above, Martin Associates used other published data. These publications include:

- Census of Wholesale Trade
- Census of Retail Trade
- Census of Construction
- Census of Service Industries; and
- Annual Survey of Manufacturers

Additionally, Martin Associates obtained published data from the U.S. Census Bureau, County Business Patterns; U.S. Bureau of Economic Analysis, Regional Input-Output Modeling System; and U.S. Bureau of Labor Statistics, "Consumer Expenditure Survey," for the Seattle Metropolitan Statistical Area.

3. Direct Impacts

Direct impacts are estimated from the results of the surveys. The direct job impacts are essentially a census of employment, earnings, and revenue by firm, and then aggregated by line of business. For example, the jobs with each business located within the industrial park are counted and included as direct jobs with industrial park jobs, and aggregated by industry sector – construction, manufacturing, transportation and warehousing, etc.

The *direct personal income* is derived directly from the interview process and estimates an average wage rate for the direct job holders, by industry sector. This average wage by sector or job category is then multiplied by the direct jobs.

The *direct business revenue* is also derived directly from the interview process.

4. Induced Impacts

The induced impacts are based on an income multiplier for each line of business. The concept of the income multiplier results from successive rounds of spending a portion of the direct wages and salaries (personal income) for goods and services. Specific to the Port of Camas-Washougal, the U.S. Bureau of Economic Analysis develops a final demand income multiplier for various types of real estate development, and for recreational boating and its components. The re-spending of income within the state of Washington is measured by a local income multiplier. The size of the multiplier for each line of business operated by the Port varies depending on the proportion of goods and services purchased locally by individuals as well as by the size of the state. The higher the proportion of locally purchased goods and services, the lower is the income leakage out of the region/state. The size of the multiplier also depends on the supplying firm’s location, which can influence the share of goods purchased in-state, as well as the level of direct income per employee.

For example, a final demand income multiplier of 4 indicates that for every \$1.00 of direct income, about \$0.75 is spent in the defined geographic region, while the other \$0.25 is either saved or spent out of the defined geographic area. The full income multiplier effect results from successive rounds of re-spending. In the initial round, one dollar is earned; of that \$1.00, \$0.75 is used to purchase goods and services; of that \$0.75 received, another 75 percent, or \$0.5625, will be used for the next round of purchases of goods and services; of this \$0.5625, again 75 percent, or about \$0.4219, will be used for further regional purchases. These successive re-spending rounds continue until an additional \$3.00 of spending in the regional economy is generated for every dollar of direct earned income. At each stage of the re-spending, additional jobs and income are created, as are consumption expenditures.

Local purchases are allocated to local service/goods suppliers based on the current expenditure profile of residents in the Clark County, Washington area, as estimated by the U.S. Bureau of Labor Statistics, “Consumer Expenditure Survey”. This survey indicates the distribution of consumer expenditures over key consumption categories for Clark County area residents. The consumption categories are:

Housing	Food at Restaurants	Food at Home	Entertainment
Health Care	Home Furnishings	Transportation Equipment and Services	

The estimated consumption expenditures generated as a result of the re-spending impact is distributed across these consumption categories. Associated with each consumption category is the relevant retail and wholesale industry. Jobs to sales ratios in each industry are then computed for the Portland-Vancouver Metropolitan Statistical Area from the U.S. Census Bureau's 2017 Economic Census, and induced jobs are estimated for the relevant consumption categories. It is to be emphasized that induced jobs are only estimated at the retail and wholesale level, since these jobs are most likely generated within the states of Washington and Oregon. Further levels of induced jobs are not estimated since it is not possible to defensibly identify geographically where the subsequent rounds of purchasing occur.

"The Consumer Expenditure Survey" does not include information to estimate the job impact with supporting business services, legal, social services, and educational services. To estimate this induced impact, a ratio of state of Washington employment in these key service industries to total state of Washington employment is developed. This ratio is then used with the direct and induced consumption jobs to estimate induced jobs with business/financial services, legal, educational, and other social services, not directly estimated from the consumption effect. This ratio is then used with the direct and induced jobs to estimate induced jobs with business/financial services, legal, educational, and other social services.

The re-spending impact includes not only the wage and salary income received by those employed to provide the goods and services to the direct job holders, but also the value of the purchases. Therefore, the re-spending/local consumption impact cannot be divided by the induced jobs to estimate the induced income, as this would overestimate the induced personal wage/salary impact per induced job.

## 5. Indirect Impacts

The *firms* supporting the direct jobs also make local purchases for goods and services from the revenue received in providing the direct services or producing the goods and services. To estimate these indirect impacts, actual local expenditures by businesses located at Parker's Landing Marina, Grove Field, and the industrial park were estimated from the 69 firms interviewed by telephone or email by Martin Associates staff. To estimate the indirect jobs, the local expenditures were used as inputs into a regional input-output model developed for the state of Washington for Martin Associates by the U.S. Bureau of Economic Analysis, Regional Input-Output Modeling System. The local purchases by type of purchase (i.e., goods, office supplies, contract business services, fuel, utilities, insurance, maintenance and repair, capital expenditures, etc.) were multiplied by the specific employment multipliers and income multipliers for the relevant goods and services providing industry sectors to estimate the indirect job and income impacts by each line of business operated by the Port.

The local purchases are the sum of the local expenditures by firm within each line of business.

## 6. Local and State Tax Impacts

It is important to emphasize that the economic impact study is not a financial impact study and does not include a firm-by-firm tax calculation. Instead, Martin Associates uses a local and state tax burden based on a percentage of income generated. The Tax Foundation publishes the local, state, and federal tax burdens (as a percent of income) for each state. This burden is applied to the total personal income impact and re-spending impact for each Port operated line of business. The local and state share of the tax impact is then estimated from the U.S. Bureau of Census State and Local Government Finance. This Census source provides tax collections by state for the local and state portions as well as by specific type of tax.

# ECONOMIC IMPACT OF RECREATIONAL BOATING AT THE PORT OF CAMAS-WASHOUGAL PARKER’S LANDING MARINA

The Port of Camas-Washougal owns and operates an over 350 slip marina, which creates important economic impacts in the Clark County regional economy. The impacts created by the recreational boating activity include the impacts generated by the vessels moored at the marina, vessels purchasing annual or daily boat launch passes, as well as the impacts of transient boats that temporarily use the marina. To estimate the impacts, Martin Associates developed a profile and inventory of recreational boats, by type moored, at Parker’s Landing Marina. In 2020, Parker’s Landing Marina was at a 100% occupancy rate. An additional 389 annual passes and 6,176 daily tickets were sold for access to the public boat launch. Parker’s Landing Marina recorded 483 nights spent by guest boats.

To develop the impact data, Martin Associates conducted interviews with tenants at the marina. The results of these surveys were used directly in estimating marina tenant impacts. Next, typical annual expenditures by type of moored boat were developed from published sources, including:

- Boating: A Survey of Boater Spending in Maryland, University of Maryland Sea Grant Program
- Measuring the Values of Marinas, Recreational Marine Research Center, Michigan State University
- Interviews with Northwest Marine Trade Association
- Marine Manufacturers Association
- The Economic Impact of Michigan’s Recreational Boating Industry, Michigan State University, Ed Mahoney
- Marine Operators Association of America; and
- Clean Vessel Act, Michigan Boating Survey,

Table 2 shows the breakdown of annual purchases by type of boat as developed from the “Boating: A Survey of Boater Spending in Maryland”, Maryland Sea Grant Program, University of Maryland and “Measuring the Value of Marinas.” Table 3 shows the breakdown for local spending by transient boat operations and adjusted for inflation.

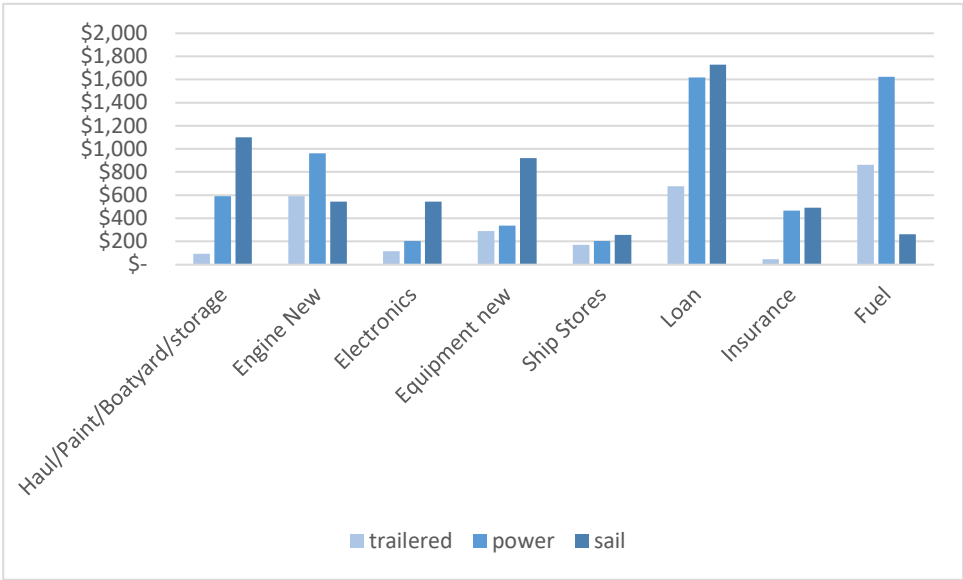


Table 2: Annual Purchases by Recreational Boats Moored at the Port of Camas-Washougal Parker’s Landing Marina

## ECONOMIC IMPACT OF RECREATIONAL BOATING AT THE PORT OF CAMAS-WASHOUGAL PARKER'S LANDING MARINA *continued*

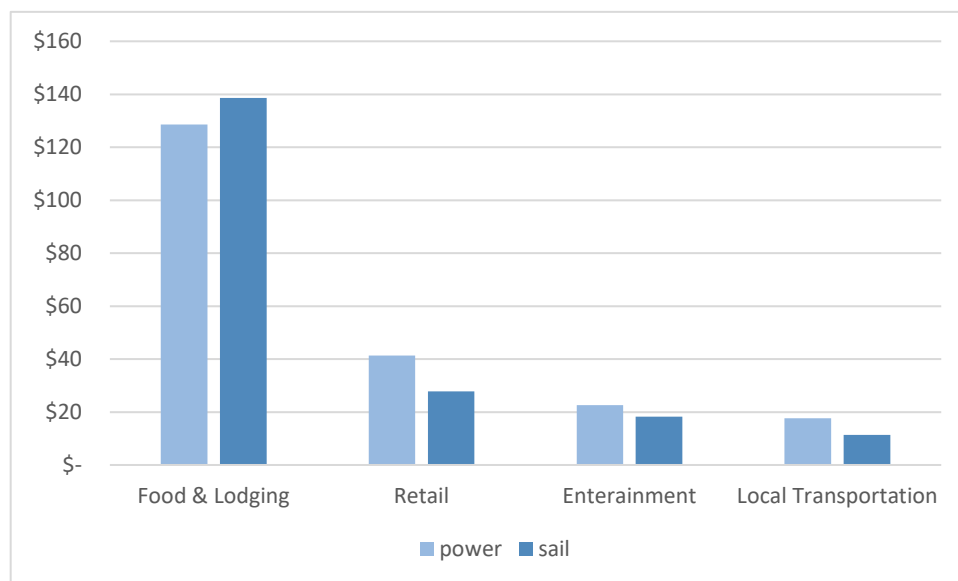


Table 3: Local Spending per Trip for Transient Boats

These annual purchases per boat are multiplied by the number of boats in each category at the marina. The annual purchases by type of boat at the Port's marina are then converted into direct jobs using survey data from suppliers and marina support service firms interviewed by Martin Associates.

The local purchases per trip for transient calls at the marina are converted into jobs, income and revenue impacts using a visitor's industry model developed for Portland-Vancouver MSA. Indirect impacts are developed from local purchases data supplied by support services providers including equipment suppliers and repair firms.

PARKER'S LANDING MARINA	IMPACTS
<b>JOBS</b>	
DIRECT	42
INDUCED	33
INDIRECT	36
<b>TOTAL</b>	<b>111</b>
<b>PERSONAL INCOME</b>	
DIRECT	\$2.02M
RE-SPENDING/LOCAL CONSUMPTION	\$4.26M
INDIRECT	\$1.39M
<b>TOTAL</b>	<b>\$7.67M</b>
BUSINESS REVENUE	\$7.91M
LOCAL PURCHASES	\$3.91M
STATE/LOCAL TAXES	\$722,000

Table 4: Economic Impact of Recreational Boating at the Port of Camas-Washougal Parker's Landing Marina, 2021

## ECONOMIC IMPACT OF RECREATIONAL BOATING AT THE PORT OF CAMAS-WASHOUGAL PARKER'S LANDING MARINA *continued*

In 2021, the recreational boating activity at the Port of Camas-Washougal Parker's Landing Marina generated the following economic impacts.

- 42 direct jobs were created by recreational boating activity at the Port of Camas-Washougal Parker's Landing Marina.
- 33 induced jobs were supported in the local economy, as a result of purchases by the 42 direct jobs.
- 36 indirect jobs were supported in the local economy as the result of \$3.9 million of local purchases by the firms dependent upon recreational boating activity at the Port of Camas-Washougal Parker's Landing Marina.
- The 42 direct jobs holders received \$2.0 million of direct wages and salaries. As the result of the re-spending impact, an additional \$4.3 million of personal income and local consumption expenditures were supported. The indirect jobholders received \$1.4 million of indirect wages and salaries.
- The marina operations generated \$7.9 million of business revenue excluding the sale of boats.
- Over \$700,000 of state and local taxes were generated by the Port of Camas-Washougal Parker's Landing Marina activity.

## ECONOMIC IMPACT OF THE PORT OF CAMAS-WASHOUGAL INDUSTRIAL PARK

The Port of Camas-Washougal operates a 300-acre industrial park established in 1966 when the United States Army Corp of Engineers created a five-and-a-half-mile levee along the Columbia River. The industrial park is home to more than 60 businesses. The Port provides facilities and services for land, air, and rail-based commerce in order to enhance employment and economic growth, contributing to the quality of life in the community. The industrial park falls into one of the key aspects of the Port's mission, which is to stimulate economic development within the Camas-Washougal area. Businesses located in the industrial park represent a diverse group of industries including retail trade, wholesale trade, manufacturing, construction, and professional services. Roughly half the business located in the industrial park are tenants of the Port, while the other half own their land and property or lease from a private third party.

With respect to the real estate analysis, the impacts created by the businesses located in the industrial park are supported by the demand for the goods and services produced by the businesses, and not by activity specific to transportation services provided by the Port of Camas-Washougal. As a result, the impacts supported by businesses of the industrial park are not as directly dependent upon the Port of Camas-Washougal as are the marina and airport impacts. Some of these companies are located in the industrial park as a direct result of efforts by the Port of Camas-Washougal to recruit them and would likely not have located in Camas-Washougal area otherwise. Other firms would likely have located in the Camas-Washougal area regardless of the Port's efforts and infrastructure investment. Therefore, the economic impacts of the industrial park activity should be viewed

## ECONOMIC IMPACT OF THE PORT OF CAMAS-WASHOUGAL INDUSTRIAL PARK *continued*

as impacts at a point in time by businesses located in the industrial park, and further these impacts are the result of the businesses that have chosen to locate in the Washougal industrial park. This location choice may reflect the desire of these businesses to locate on prime real estate property on which the Port has, through investment, developed the necessary infrastructure, including road and utility access. This infrastructure investment by the Port has occurred in a stagnant economy, and at the risk of the Port in undertaking infrastructure investment with municipal non-taxable bonds and grants, secured at lower interest costs than would be the case otherwise. Thus, the Port of Camas-Washougal's investment at lower infrastructure and development financing costs allows businesses to form and or operate in the region when private developers may not otherwise be able. This type of investing and business support fulfills one of the Port of Camas-Washougal's primary purposes, that of economic development within Clark County.

The impact analysis of the industrial park businesses is based on a survey of 62 businesses. Martin Associates developed a separate real estate impact model to estimate the impacts of these businesses on the Camas-Washougal economy. In addition, the impact model can be used to assess the impacts of potential uses of Port-owned property, including, manufacturing, construction, warehousing, and transportation, as well as other industrial uses.

PORT OF CAMAS-WASHOUGAL	INDUSTRIAL PARK
<b>JOBS</b>	
DIRECT	1,125
INDUCED	561
INDIRECT	205
<b>TOTAL</b>	<b>1,891</b>
<b>PERSONAL INCOME</b>	
DIRECT	\$58.55M
RE-SPENDING/LOCAL CONSUMPTION	\$46.13M
INDIRECT	\$8.43M
<b>TOTAL</b>	<b>\$113.11M</b>
BUSINESS REVENUE	\$394.29M
LOCAL PURCHASES	\$45.68M
STATE/LOCAL TAXES	\$10.64M

Table 5: Economic Impact of the  
Port of Camas-Washougal Industrial Park

## ECONOMIC IMPACT OF THE PORT OF CAMAS-WASHOUGAL INDUSTRIAL PARK *continued*

As summarized in Table 5, the Port of Camas-Washougal Industrial Park businesses create the following economic impacts due to the level of business activity in 2020:

- 1,125 direct jobs are with businesses located at the industrial park, and as the result of local purchases by these direct employees, another 561 induced jobs are supported in the Camas-Washougal regional economy. These businesses made \$45.7 million of local purchases, supporting 205 indirect jobs. This indirect impact reflects the dependency on the local economy supply infrastructure for businesses located at the industrial park.
- The 1,125 direct employees of the Port's real estate tenants received \$58.5 million of wages and salaries. As the result of the local purchases by these employees, another \$46.1 million of income and local consumption expenditures were generated, resulting in the induced job impact. The 205 indirect jobholders received \$8.4 million of indirect wages and salaries for a total personal income and local consumption impact of \$113.1 million.
- The businesses located at the industrial park received nearly \$394.3 million of revenue, of which \$45.7 million was used for local purchases, as identified from the surveys of these businesses. These local purchases supported the 205 local indirect jobs.
- \$10.6 million of state and local taxes were generated by industrial park businesses.

Table 6 shows the composition of the businesses located at the industrial park. As this table indicates, the manufacturing sector creates the largest number of direct jobs. Retail Trade supports the greatest revenue followed by manufacturing sector. The manufacturing sector spends the most on goods and services in the regional economy. Miscellaneous includes various one-off businesses located in the industrial park including a brewery, auction services, landscaping business, and City of Camas municipal court building, to name a few. Miscellaneous businesses did not fit into the other industry sectors and were therefore lumped together for confidentiality. Port jobs, revenue, and expenditures related to airport and marina activity were allocated to those individual lines of business and included in the respective impacts. Administrative and support for the entire Port and activities associated with the industrial park are shown in Table 6 as their own impacts. Overall, the industrial park supports an average salary of \$52,045.

# ECONOMIC IMPACT OF THE PORT OF CAMAS-WASHOUGAL INDUSTRIAL PARK *continued*

JOBS	DIRECT	INDUCED	INDIRECT	TOTAL
Construction (23)	117	61	21	199
Manufacturing (31-33)	504	247	109	861
Wholesale Trade (42)	144	67	3	214
Retail Trade (44-45)	167	83	56	305
Professional, Scientific, & Technical Services (54)	17	11	1	29
Other Services (except Public Administration) (81)	50	22	2	73
Miscellaneous	111	61	9	181
Port	15	9	4	29
Total	1,125	561	205	1,891
INCOME	DIRECT	INDUCED	INDIRECT	TOTAL
Construction (23)	\$6.7M	\$5.3M	\$882,000	\$12.9M
Manufacturing (31-33)	\$25.3M	\$20M	\$4.7M	\$49.9M
Wholesale Trade (42)	\$6.5M	\$5.1M	\$103,000	\$11.6M
Retail Trade (44-45)	\$8.6M	\$6.8M	\$2.1M	\$17.4M
Professional, Scientific, & Technical Services (54)	\$1.4M	\$1.1M	\$46,000	\$2.6M
Other Services (except Public Administration) (81)	\$1.9M	\$1.5M	\$83,000	\$3.5M
Miscellaneous	\$7.1M	\$5.6M	\$336,000	\$12.9M
Port	\$1.1M	\$874,000	\$246,000	\$2.2M
Total	\$58.6M	\$46.1M	\$8.4M	\$113.1M
MISCELLANEOUS IMPACTS		REVENUE	LOCAL PURCHASES	TAXES
Construction (23)		\$99.7M	\$3.1M	\$1.2M
Manufacturing (31-33)		\$102.8M	\$24M	\$4.7M
Wholesale Trade (42)		\$15.7M	\$724,000	\$1.1M
Retail Trade (44-45)		\$141.6M	\$14.6M	\$1.6M
Professional, Scientific, & Technical Services (54)		\$6.6M	\$185,000	\$245,000
Other Services (except Public Administration) (81)		\$13.8M	\$286,000	\$329,000
Miscellaneous		\$11.6M	\$2.4M	\$1.2M
Port		\$2.5M	\$429,000	\$210,000
Total		\$394.3M	\$45.7M	\$10.6M

Table 6: Composition and Economic Impact of Businesses of the  
Camas-Washougal Industrial Park

## ECONOMIC IMPACT OF THE PORT OF CAMAS-WASHOUGAL GROVE FIELD

Established in 1962 and purchased from Ward Grove, Grove Field is a general aviation airport located 3 miles north of Camas, Washington. Grove Field offers runway 07/25, seventy-seven hangars, 2 commercial hangars, and 14 tie downs for lease at the airport. Available through a card lock system, 100 low lead fuel is available 24-7. Commercial hangar space is also available for those looking to start or expand their business. Also located at Grove Field is FlyIt Academy. FlyIt Academy is a community of pilots passionate about general aviation. Devoted to transforming dreams of flying into reality by teaching the art of aviation, FlyIt Academy has instruction available to flight enthusiasts of all levels. In addition to flight instruction, FlyIt Academy offers mechanic services.

PORT OF CAMAS-WASHOUGAL	GROVE FIELD
<b>JOBS</b>	
DIRECT	23
INDUCED	13
INDIRECT	17
<b>TOTAL</b>	<b>53</b>
<b>PERSONAL INCOME</b>	
DIRECT	\$1.6M
RE-SPENDING/LOCAL CONSUMPTION	\$1.3M
INDIRECT	\$1.1M
<b>TOTAL</b>	<b>\$4M</b>
<b>BUSINESS REVENUE</b>	<b>\$3.7M</b>
<b>LOCAL PURCHASES</b>	<b>\$1.6M</b>
<b>STATE/LOCAL TAXES</b>	<b>\$380,000</b>

Table 7: Economic Impacts of the Port of  
Camas-Washougal Grove Field

As summarized in Table 7, the Port of Camas-Washougal Grove Field create the following economic impacts due to the level of business activity in 2020:

- 23 direct jobs are with aviation activity and businesses located at the Grove Field, and as the result of local purchases by these direct employees; another 13 induced jobs are supported in the Camas-Washougal regional economy. These businesses made \$1.6 million of local purchases, supporting 17 indirect jobs.
- The 23 direct employees associated with aviation activity and business located at Grove Field received \$1.6 million of wages and salaries. As the result of the local purchases by these employees, another \$1.3 million of income and local consumption expenditures were generated, resulting in the induced job impact. The 17 indirect jobholders received \$1.1 million of indirect wages and salaries for a total personal income and local consumption impact of \$4.0 million

## ECONOMIC IMPACT OF THE PORT OF CAMAS-WASHOUGAL GROVE FIELD *continued*

- Aviation activity and the businesses located at Grove Field supported nearly \$3.7 million of revenue, of which \$1.6 million was used for local purchases, as identified from the surveys of these businesses. These local purchases supported the 17 local indirect jobs.
- \$380,000 of state and local taxes were generated by Grove Field activity.

## STUDY CONCLUSION

This analysis illustrates the importance of the Port of Camas-Washougal in the local economy as a major source of job creation, particularly of direct jobs with an average annual salary of \$52,275, as well as a major catalyst in the greater Portland-Vancouver metropolitan region, the state of Washington, and the Pacific Northwest and national economies. In order to sustain this growth as an economic engine, it is critical that the Port of Camas-Washougal continues to invest in infrastructure to meet future demand, and to continue to attract businesses to stimulate further economic development in the region. This economic study suggests that the continued growth and investment in the Port, such as the planned Parker's Landing Waterfront Development, will result in further job, income, and tax growth for the greater Portland-Vancouver metropolitan region, the state of Washington, as well as the Pacific Northwest.