



# **CLACKAMAS COUNTY FAIRGROUNDS AND EVENT CENTER**

Phase I Report  
September 2018

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# Executive Summary

Phase I of the Clackamas County Fair and Event Center Master Plan and includes a review of existing plans and documentation about the condition of facilities and their ability to host intended uses, a market analysis to evaluate opportunities to increase revenue, and outreach to users, stakeholders, and the general public. This is the first step towards refreshing the master plan to incorporate new findings and develop a strategic plan to implement the additions and changes. The final chapter of the report provides a proposed scope of work and cost estimate for Phase II of the Master Plan.

## Current Conditions

### Facilities

The Fairgrounds are home to a number of facilities of different sizes that accommodate different types of events. A map of the Fairgrounds and facilities is included as Appendix A. The following table lists each facility’s capacity, uses and issues. Maximum capacity at these facilities ranges from 95 people in Clackamas Hall to 500 at the Main Pavilion main floor, and to 4,000 at the outdoor Rodeo Arena. All existing buildings are deficient in one or more ways and should be upgraded and maintained to better serve visitor expectations and meet quota requirements.

Facility	Capacity	Fair Use	Non-Fair Use	Issues
Main Pavilion	200-533	Exhibit Space	Rentals: meetings, parties, fundraisers, weddings, memorial services, product shows	Accessibility, egress, fire/safety, seismic, heating/cooling
4-H Hall	350	4-H	Rentals: meetings, weddings, dinners, memorial services	Fire/safety, accessibility, seismic
Clackamas Hall	95		Meetings, classes, parties	
Horning Hall	200		Meetings, parties, classes, memorial services	
Ely Arena	300 (seating)	Livestock stalls, exhibition space	Horse events, livestock shows, dog events	Egress, accessibility, seismic
Rodeo Arena	4,000	Rodeo, music, entertainment	Rodeo / horse events;	Drainage, seating
Rabbit Barn		Rabbits and poultry		
Rosebrook Arena			Auctions, livestock shows, swap meets	
Floral Area		Master Gardener	Lightly used	Facilities in poor condition

## Events

Different events held at the Fairgrounds will draw specific crowds or people with varying interests. Well-performing events may create repeat attendance. The ability to host multiple events on the same day creates critical mass, which adds to a festival-like atmosphere that many people seek. Keeping these factors in mind helps to paint the picture for why some events pull larger crowds than others. Facility capacities and available amenities contribute to frequency of use. Key findings of facility and event usage over the last three complete fiscal years include:

- The Fair accounts for less than 10% of annual attendance at the Fairgrounds.
- Over the last few years, the total number of events (including paid events) has decreased slightly.
- More events are increasingly hosted at the Ely Arena and Clackamas Hall.
- Most of the revenue-generating events are held in the Main Pavilion, Clackamas Hall and Ely Arena.
- Equestrian activities traditionally make up a larger portion of total events at the Fairgrounds.

Hundreds of events take place at the Clackamas County Fair and Event Center each year. The types of events at the Fairgrounds are:

**4-H Events.** Horse judging, weigh-ins, recruitment meetings, animal shows, contests, etc. Generally single-day events, but some span multiple days (e.g. 4-H Horse Fair, tack sale, etc.). Average attendance: 500 people.

**Animal Events.** Club and organization meetings and animal shows. Generally single-day events. Average attendance: 350 people.

**Equestrian Events.** Oregon High School Equestrian Teams practices, other racing club practices, rodeos, horse shows, etc. Generally single day events. Average attendance: 60 people.

**Fair-Related Events.** Fair Board meetings, auditions and fair set-up, and the Fair and Rodeo. Generally single-day events (for planning purposes activities leading up to the Fair) and the actual Fair and Rodeo spans multiple days. 2017 attendance: 114,120 people.

**Miscellaneous Events.** Weddings, private parties, ceremonies, public events (e.g. scavenger hunts or Easter egg hunt, cook-offs, gem shows, etc.), dinners and auctions, and expos. Generally single-day events, but some span multiple days. Average attendance: 500 people.

**Sherriff Posse Events.** Meetings and ride nights. Generally single-day events. Average attendance: 25-30 people.

# Community Vision

## Activities and Events

All stakeholders would like to see Fairgrounds facilities used as frequently as possible throughout the year. Among stakeholder suggestions of types of activities and events the Fairgrounds should try to attract during non-Fair times are concerts, microbrewery festivals, home and remodel trade shows, boat shows, car clubs, speakers and lecturers, tack sales, birthday parties and weddings, and summer or church camps.

## Needed Facilities and Improvements

When asked about the types of facilities and improvements that would be needed to accommodate desired events, aside from maintenance and upgrades to existing facilities to improve visitor experience and meet code requirements, the most frequent suggestion is a large multi-use facility or facilities that could replace the Horse Barn during Fair time and host conventions, conferences and concerts throughout the year. Another common recommendation is to expand seating and make other upgrades, including possible relocation, to the Rodeo Arena to make it more usable throughout the year. Other frequent suggestions for new facilities include:

- Permanent or portable stage (concerts)
- Redeveloped floral area / gazebo (weddings)
- Outdoor spaces (dog show)
- Campgrounds and RV Park facilities

## Next Steps

The next step in the process will be to gather information about possible improvements and new facilities and evaluate them relative to their ability to achieve the goal of increasing facility use and revenues. A proposed scope of work for Phase II is included at the end of this report. Key themes identified through stakeholder outreach to consider in Phase II include:

**Preserve Traditions and Historic Character.** Survey respondents like the historical elements of the Fair and Events Center. They also like the traditional activities and events (e.g. livestock shows, agricultural events, and rodeos). Preserving these physical and experiential elements is important to survey respondents. Some even indicated that they did not want to see anything change: they enjoy the existing spaces and events as they are.

**Modernize Facilities.** More than half of survey respondents explained the importance of “updating” or “modernizing” the existing facilities. Many specifically noted that the horse / livestock barns and arenas needed updating. Many wanted new facilities too and suggested a new multipurpose building and a new barn. Survey respondents believe that

modern facilities will attract more events and visitors. Two survey respondents suggested using the Redmond facilities as a model for updates and improvements.

**Enhance Comfort and Access.** Survey respondents want to see ADA improvements (e.g. wheelchair accessibility and paved walkways). Some made suggestions to maintain cooler temperatures in the buildings, build more bathrooms (with showers), and install power sources to the campsites. Survey respondents believe these modifications will attract more visitors.

**Expand Events and Event Capacity.** People enjoy the County Fair, but they identified other events that they wanted to see at the facility too. Suggestions include: beer fests, concerts, antique shows, car shows, dog shows, horse shows, craft and flea markets, yoga, industry (workforce) events, and historical events. They believe family-friendly events will help attract more visitors too.

**Focus on 4-H.** Survey respondents are particularly interested in ensuring that both the 4-H building and the 4-H program are well supported. Many want to create and maintain a place for children and youth.

# I. Introduction

A landmark in Canby and Clackamas County, the 50-acre Clackamas County Fair and Event Center has been located on its current site for more than 100 years and celebrated its centennial birthday in 2006. The first Fair was held in 1907, and the initial Fairgrounds were purchased in 1909. The Main Pavilion was constructed in 1924, with additional buildings added to the grounds through the years. The Fair and Event Center is Clackamas County's major agricultural and industrial exposition venue, hosting a wide variety of shows and events year-round. These events include equestrian events, trade shows, festivals, weddings, youth activities, community gatherings, and of course the annual fair. As a recent survey concluded, the Clackamas County Fair is a "well-loved fair".

The mission of the Fair Board is to "provide a showplace for educational activities, healthful competition, recognition of our county youth, displays of better methods and products of agriculture, business, commerce, history and tourism." The seven-member Fair Board is charged by the County Commissioners with the entire business and management of the facilities and Fairgrounds. With this responsibility and with the current economic climate, the Fair Board and management staff desire a new master plan to provide a clear vision for the immediate and long-term future for Fairgrounds facilities.

This report summarizes Phase I of the Master Plan and includes a review of existing plans and documentation about the condition of facilities and their ability to host intended uses, a preliminary market analysis to evaluate opportunities to increase revenue, and outreach to users, stakeholders, and the general public. This is the first step towards refreshing the master plan to incorporate new findings and develop a strategic plan to implement the additions and changes. The final chapter of the report provides a proposed scope of work and cost estimate for Phase II of the Master Plan.

## II. Summary of Existing Planning Documents

As part of the Discovery phase of the Master Plan for the Clackamas County Fair and Event Center, the consultant team reviewed recent planning documents including the *Clackamas County Fair Master Plan (1996)*, the *Clackamas County Event Center Master Plan (2009)*, the *2014 Vision and Property Assessment Phase I Plan*, and the *2014 Building Reports Summary*. The following is a summary of key information from those documents that may influence the direction of the master plan.

### Clackamas County Fair Master Plan – 1996

The Clackamas County Fair Master Plan was produced in 1996 to assess the physical site characteristics, facility conditions and market/financial conditions of the Clackamas County Fairgrounds (now Clackamas County Fair and Event Center) and develop a strategic plan for improving the site.

Through outreach with stakeholders comprised of event organizers, staff, board, and other parties involved with the Fairgrounds, this plan identifies a series of challenges and major issues. These include the lack of certain essential facilities necessary for the operation of the fair and other events and activities, such as sufficient parking at peak times, and a large, flexible multi-purpose space with a hard-surfaced floor. Additionally, several facilities were functionally inadequate to accommodate events, such as the existing horse stalls, a structurally deficient grandstand, and Ely Arena which was considered “unfriendly” and lacking appropriate amenities for fair events. These issues were compounded by general inadequate facilities throughout the site including inadequate electric power distribution, ventilation, site drainage, and restroom quality.

To address these issues, the plan organizes a series of recommended actions into three phases – short, medium, and long term – to improve Fairground facilities while preserving the features that visitors find attractive. They are summarized in Table 1.

Phasing	Facility	Improvements
Short Range	Ely Arena	Upgrade egress, sprinklers, seating, restrooms, return chute, lighting, painting, and siding
	Main Pavilion	Remove the Sign Shop
	4-H Building	Upgrade floors, ventilation, electrical, and ADA accessibility
	Parking	Pave the Red Lot
	Sitewide	Upgrade the electrical system and storm drainage, remove the grandstand, and continue roof repairs and upgrades
Medium Range	Ely Arena	Add a warm-up area
	Main Pavilion	Upgrade egress, ventilation, electrical, elevator, roof repairs, kitchen, and ADA accessibility
	Horning Hall	Upgrade electrical, mechanical, and ADA accessibility
	RV Area	Construct a shower/restroom area
	Sitewide	Replace livestock barn with two 20,000 sq. ft. buildings, replace the grandstand, relocate the floral arcade and agricultural building, construct a new stage, and add fire hydrants
Long Range	Rodeo	Expand seating
	Equestrian	Add additional stalls and replace existing aging stalls
	Parking	Improve main road circulation and pave the Blue Lot
	Sitewide	Build new maintenance facilities and fair entrance gateway, replace rabbit/poultry barn with a larger multi-purpose building, and upgrade the central lawn area

**Table 1. Clackamas County Fair Master Plan Summary of Improvement Recommendations, 1996.**

# Clackamas County Event Center Master Plan – 2009



Figure 1. Clackamas County Event Center Master Plan Map.

The Clackamas County Event Center Master Plan is a facility-oriented plan that proposes constructing several buildings, replacing dilapidated structures and updating existing structures. It organizes a series of recommended improvements based on key considerations including market/revenue potential, operation costs, building code, parking, sensitivity to neighbors, and the site’s “old fashioned fair” feel. Many of the recommended actions are similar to the 1992 plan and are summarized in Table 2.

Phasing	Facility	Improvements
Short Range	Multi-Purpose Building	Construct
	Main Lawn Restroom Pavilion	Replace existing Main Lawn Restrooms
	4-H Exhibit Hall	Upgrade sub-structure flooring, windows, kitchen retrofit, restrooms, HVAC, insulation, and painting
	Horning Hall	Upgrade carpeting, HVAC, kitchen, restrooms, painting, and replace louvered wall dividers
	Ely Arena (first phase)	Roof repairs, replacement of south end wall, resurfacing of the floor, replacement of south restrooms, adding an ADA accessible restroom, and replacement of concession area
	Main Pavilion	Upgrade restrooms, HVAC, kitchen, and replace lower-level flooring
Medium Range	Rodeo Grandstands	New restroom
	Floral Building	Retrofit to host receptions, reunions, and floral/agricultural exhibits during the fair and serve as command center for the Emergency Response Team
	Maintenance Storage (first phase)	Move maintenance facility and equipment/supply storage area
	Ely Arena (second phase)	Roof repairs, replacement of lighting units, replacing siding on structure, and upgrade of the north end restrooms/showers
Long Range	Maintenance Storage (second phase)	Finish construction
	Main Pavilion	Upgrade upper level HVAC, flooring, paint, lighting, and ramp
	Underground Water System	Upgrade

**Table 2. Clackamas County Event Center Master Plan Summary of Improvement Recommendations, 2009.**

## 2014 Vision and Property Assessment Phase 1 Plan

The 2014 Vision and Property Assessment Phase 1 Plan summarizes a series of community and public input about the future trajectory of the Clackamas County Event Center. The planning process for this document included a significant outreach component to determine a broad vision and direction for the future of the Event Center.

The community places a strong emphasis on preserving the legacy/character/nostalgia associated with the Fairgrounds and balancing that with the anticipated interests of urban/younger demographics. Stakeholders feel that addressing needed improvements will require strengthening community connections, drawing awareness, and securing significant additional revenue. Stakeholder priorities for the Fairgrounds included making operations/maintenance self-sustaining, master planning, improving safety of facilities, and securing financing.

The document noted additional considerations about the physical characteristics of the site. One challenge of incorporating the variety of uses on site is its limited size. Adding new buildings is challenging, and moving the complex is largely impractical and unpopular. This is compounded with several stands of trees on site that compete for building space with other potential uses. However, these stands are well-loved by community members and make the site unique. Additionally, there is a potential conflict for increasing campgrounds/RV parking because of the site's location near a residential neighborhood in Canby.

The report also lists a series of recommendations about facilities based on community input, presented in Table 3.

### **The Fairgrounds Mission**

The Fair Board and Staff's dedication and purpose is to provide a showplace for educational activities, healthful competition, recognition of our county youth, displays of better methods and products of agriculture, business, commerce, history and

Facility	Recommendations
Barn/Livestock Facilities	Demolish and rebuild
Rodeo Arena	Consider moving in the future. Construct a large cover/roof.
4-H Exhibit Hall	Construct a commercial kitchen, add a heat pump, and upgrade restroom, floors, and fire safety
Ely Arena	Remove food area, replace the roof, build new restrooms, upgrade lights, fix siding/dry rot, address air circulation
Main Pavilion	Upgrade roofs, floors, subfloors, restrooms, ADA accessibility, kitchen, lighting, HVAC, and egress
Clackamas Hall	Perform maintenance and expand restrooms
Horning Hall	Upgrade lighting, heating, siding, flooring, entryways, and bathrooms while preserving the “quaint” nature of amenities (e.g. baby-changing area)
Rosebrook Arena	Upgrade drainage, water access, and physical safety
Floral Area	Replace with new multipurpose structure
Carnival Area	Too small; include in master plan

**Table 3. Vision and Property Assessment Phase 1 Plan Summary of Recommended Actions, 2014.**

## 2014 Building Reports Summary

The 2014 Building Reports Summary reviews the status of four buildings on the Clackamas County Event Center –Main Pavilion, 4-H facility, Ely Arena and Rodeo Arena – and makes recommendations/cost estimates related to improving their functionality and compliance with local building code. They estimated the total cost as follows:

- Main Pavilion: \$4,552,425
- 4-H Building: \$409,023
- Ely Arena: \$1,797,902
- Rodeo Arena: Contingent on bleacher inventory and cost estimate

### Code Compliance

For each structure except for the Rodeo Arena, this document presented a series of recommendations to improve compliance with local code. Table 4 summarizes the document recommendations.

Building	Category	Improvements
Main Pavilion	ADA/Accessibility	Ramp, restrooms, stairs, and other element improvements (not voluntary; reduces liability)
	Fire and Safety	New egress and improving fire resistance of the building
	Seismic Capacity	Shear walls and floor diaphragms
	Energy Consumption	Improved insulation/HVAC, restore clerestory windows to provide natural light
4-H Facility	ADA/Accessibility	Ramp and restroom improvements
	Fire and Safety	Automatic sprinkler system
	Seismic Capacity	Seismic strengthening and rafter reinforcement
	Energy Consumption	Improved insulation/HVAC
Ely Arena	ADA/Accessibility	Restroom improvements, new wheelchair viewing area, and prerecorded announcements additionally presented as text.
	Fire and Safety	New egress on the north side of the structure
	Seismic Capacity	Seismic strengthening
Rodeo Arena	N/A	No recommended code improvements

**Table 4. Building Reports Summary - Summary of Code Improvements, 2014**

## General Recommendations

In addition to code-related improvements, this document also made a series of recommendations to improve the overall functionality and comfort of structures. Table 5 summarizes the document recommendations.

Building	Category	Improvements
Main Pavilion	Restrooms	Enlarge restrooms and improve appearance/functionality
	Kitchen	Add a commercial-type kitchen
	Thermal Comfort	Improve insulation/HVAC
	Historic Preservation	Restore windows, sidings, atrium, and other improvements
4-H Facility	Restrooms	Improve accessibility, finishes, and fixtures
	Thermal Comfort	Improve insulation/HVAC
	Historic Preservation	Consider doing window improvements
	Gutters	Reinstall gutters to reduce water damage
Ely Arena	Restrooms	Remodel existing north restrooms Add a new set of restrooms on the northeast corner Remove the south end restrooms
	Erosion	Install gutters and downspouts and adjust grade adjacent to structure to reduce erosion
	Thermal Comfort	Improve insulation and ventilation
	Lighting	Install an induction lighting system and improve natural light
	General Appearance	Replace exterior siding of walls and doors Add white vinyl insulation to increase reflection of light inside building
Rodeo Arena	Drainage	Improve site drainage system
	Cover	Cover the rodeo arena Challenges include: covering a long span without structural columns interrupting sight lines, modifications to the existing bandstand roof, and costs associated with investment (i.e. multi-million dollar)
	Bleachers	Replace/repair decayed wood planks Replace wood foundations with concrete footings Clean rust from framing members and add liquid galvanization Repair welded joints as needed

**Table 5. Building Reports Summary - Summary of General Recommendations, 2014**

# III. Outreach Summary – Stakeholder Interviews and Survey

## Introduction

Outreach to key stakeholders included focus group and phone interviews, in addition to a widely-distributed online survey. The consultant team conducted focus groups with select members of the Fair Board and other key stakeholders during the day of the project kick-off meeting in March 2018. For those unable to be present at the focus groups, the team followed up via phone for additional interviews. Stakeholders participating in focus groups or phone interviews consisted of 27 total participants including Fairground partners, vendors and representatives of the City and County chambers of commerce, tourism and economic development staff, planning agencies, civic groups and others, as requested by the Board.

The online survey had a total of 78 respondents that included visitors, Clackamas County Fair and Event Center users, vendors, and other community members.

Both outreach methods were designed to identify key issues, opportunities and areas of consensus at the project's outset. Their responses are summarized below. A full compilation of stakeholder interview and survey comments is attached.

## What Works Well

Located in the heart of Clackamas County, the Fairgrounds are a unique venue that showcases country affairs and provides a “pulse” on the County’s rural lifestyle according to interviewees. Below are some of the key factors that stakeholders identified as working well.

### The Site

Stakeholders note that the Fairgrounds’ location is central, convenient and accessible from nearby Hwy 99E. It also has many of the amenities of being located in a small town, including a “hometown feel”, local amenities within walking distance, rural aesthetic and historic significance. Additionally, the Fairgrounds have an abundance of mature stands of trees and minimal pavement, allowing for a lot of flexible open space that is shaded and still allows for easy parking.

## The Facilities

The prevalence of flexible open space allows many vendors, staff and visitors to walk freely through the grounds comfortably and the site can often support multiple events occurring simultaneously. Stakeholders indicate that large, recurring events are well-organized by staff, allowing for the efficient use of available space. Existing facilities such as restrooms are kept clean and functional, and staff is considered friendly and helpful.

## The Activities and Events

The Fairgrounds promote a variety of entertaining, family- and age-friendly programming, including recurring events such as the Fair, the Oregon Flock and Fiber Festival, 4-H events, Canby Rodeo, Spring Garden Fair, Gem and Rock Show, Spring in the Country Bazaar, and Christmas Bazaar. Respondents suggest that existing programming has kept a more “traditional” feel without becoming increasingly commercialized.

## What Needs Improvement

While the Fairgrounds and its facilities are charming and well-loved, there is a general consensus that many of the facilities at the Fairgrounds are outdated and in need of increased maintenance and modernization in order to keep pace with event demands. Below is a summary of stakeholder recommendations about individual facilities as well as the site as a whole.

### Sitewide

Among general improvements to Fairgrounds, a common concern is centered around parking and circulation through the site. Many feel that parking and navigation can be stressful and confusing due to poor traffic signage. Others feel that the fees are too high, incentivizing parking in surrounding areas and neighborhoods. Additionally, parking during the winter is logistically challenging, because existing parking is unpaved and does not drain adequately during the rainy season.

Many stakeholders indicate the need for a large multi-purpose building that could hold a wider diversity of events such as conventions, business groups, trade shows, and music concerts. Stakeholders suggest such a facility would need to be fairly large, with most estimates between 40,000-50,000 sq. ft., and should have flexible internal conversion to include a large arena and smaller meeting rooms and classrooms. Other note that it might be more feasible to make small improvements to improve the usability of existing facilities before making a large investment in a new one.

In addition to a multi-purpose building, a large proportion of respondents suggest the need for a barn to accommodate livestock and equestrian activities. Many consider the

temporary tent facility to be inadequate to support the demand throughout the year and cite existing facilities lacking proper circulation to maintain a reasonable comfort level. Additionally, several respondents note a nostalgia regarding the barn that had originally existed at the Fairgrounds and was later demolished, suggesting a new barn designed in the character of the original may be well-received.

There are several suggestions to improve the condition of the grounds across the site. The addition of a portable or permanent stage could allow for music events, and possibly a gazebo to allow for expanded outdoor weddings. Respondents also suggest that the dog show could be upgraded with the addition of space that can accommodate a 120' x 100' agility course. Many also note that the outdoor rodeo needs maintenance and upgrades, especially with regards to expanded seating. Both events draw in significant crowds and have the potential to expand with improved facilities. Finally, various respondents suggest a need for small-event rental space available and affordable to the public.

### Ely Arena

Respondents indicate the Ely Arena needs upgrading to ensure that it can accommodate future demands. Notably, the siding and gutters are in poor condition leading to standing water accumulating after heavy rains. The existing restrooms are not adequate to accommodate demand, and the structure requires upgrades to existing sprinklers and egresses to ensure the safety of visitors. Finally, some see a need for additional seating to the arena including bleachers, reconfigured roping areas and a VIP section.

### Main Pavilion

The Main Pavilion is one of two buildings at the Fairgrounds that is historically and culturally significant to the County. The age and charm of this building are cited as a feature that contributes to the traditional "hometown" aesthetic, but stakeholders also note that it would benefit from several upgrades. The lack of air conditioning and other amenities to improve comfort are mentioned frequently and several respondents suggest that bathrooms need to be remodeled. Because the space is used as a community gathering space, survey respondents and interviewees both suggest that it would benefit from an improved sound system and acoustics. Others indicate that safety and accessibility improvements are also important, as is reflected in the 2014 Building Report.

### 4-H Building

Like the Main Pavilion, the 4-H Building is considered historically and culturally significant to the County and was originally used as a dance hall before transitioning to 4-H and other uses. Interviewees note several structural improvements that would improve its functionality during the fair and other events. Currently, the electrical system is inadequate to handle the usage demands, resulting in frequent breaker trips. A lack of adequate

heating, ventilation and air conditioning (HVAC) also makes the facility less comfortable during hot weather. Additionally, the building could be better suited to host large events with updated acoustics and a remodeled commercial kitchen. Others suggest structural improvements such as filling holes in the building floor, adding a back porch that was previously removed and a possible expansion of the building.

### Floral Area

Survey respondents and interviewees both suggest that the floral area needs improvements, and some recommend that the existing structures be replaced entirely to create a wedding venue, reception area and floral/vegetable display area.

### Campgrounds and RV Park Facilities

There are limited options for lodging in Canby, and stakeholders indicate that the RV Park and Campground facilities are some of the only options for travelling visitors to stay for multi-day events. Upgrading facilities such as showers, bathrooms, wiring/electricity and septic systems would allow travelers to stay comfortably for these types of events. However, others express that the Fairgrounds should focus on being a hub for agricultural activity instead of RVs and note that the distance from I-5 makes RV travel less practical for travelers. Balancing these concerns as well as concerns for neighboring uses are important considerations in determining upgrades.

## Activities and Events

For both survey respondents and interviewees, the fair is a well-organized, family-friendly and authentic event that is a tradition for many community members.

Additionally, other recurring events at the Fairgrounds provides a nice variety of activities that are entertaining and suitable for all ages.

With facility upgrades, community members are optimistic about expanding the variety of events that the Fairgrounds could host to improve its cultural and financial viability and have a wide range of ideas about what non-fair events could be hosted.



Figure 2. Potential Non-Fair Events and Activities

Interviewees also note several considerations in hosting events. Logistically, the Fairgrounds would need more capacity to canvass and advertise events and would need to think strategically about how to market the Fairgrounds as a rental and event space. Some interviewees recommend that the Fairgrounds focus on rural-themed events and activities, because they lack the resources to compete with larger convention and exhibition centers that attract more urban interests.

## Opportunities and Trends

Outreach participants also indicate several factors the Fairgrounds should consider to improve the overall viability of the site. One of the most frequently mentioned considerations is making events more appealing to a larger demographic. This includes monitoring the preferences of various age demographics, such as millennials, and balancing those interests with the traditional and rural atmosphere of the fair. Other

respondents suggest that improving affordability for lower-income demographics would help their ability to participate in fair and non-fair activities.

Selling an 'experience' is another strategy the Fairgrounds should consider in order to attract events with more attendees. A farmers market on a Saturday morning could bring people to the Fairgrounds, and then other events – music, kids activities, plays – could keep them there for the rest of the day. Multi-day concert and camping events (e.g. Harefest) could bring in people from throughout the region. A rodeo followed by music is another good example. Outdoor weddings is another trend that the Fairgrounds should pursue.

Survey respondents provide several considerations about issues related to large event areas including waste reduction and recycling, food carts and other alternative vendor facilities, and alternative transportation choices including electronic vehicles, carpooling, ride sharing and transit. With change on the horizon, stakeholders stress the importance of maintaining the rural/country aesthetic, small-town feel, authenticity, and age- and family-friendly programming to maintain its tradition for long-time community members.

Institutionally, respondents note that the Fair Board should think strategically about financing and partnerships. Collaborating with the City of Canby to promote events at the Fairgrounds is an easy first step. Stakeholders note that the organization will need to secure stable finance to ensure the long-term viability of the site, and some recommend dedicating a percentage of rental fees to capital expenditures and costs related to the maintenance of structures. To supplement the expertise of Fairgrounds staff, some interviewees suggest forming partnerships with other County departments or Clackamas Community College to provide technical assistance. Some respondents suggest a business plan and marketing plan are needed.

# IV. Market Assessment

## Introduction

The Clackamas County Fairgrounds and Event Center (the Fairgrounds) is a 50-acre site, operating as an events venue for over 100 years. The Fairground's primary purpose is to "provide a showplace for educational activities, healthful competition, recognition of our county youth, displays of better methods and products of agriculture, business, commerce, history and tourism."<sup>1</sup>

When established in the early 1900s, the Fairgrounds featured a livestock barn, a temporary grandstand (seating area for spectators), a race track and a pavilion. Currently, the Fairgrounds maintains a 7,000 sq. ft. rebuilt and remodeled pavilion, three halls (4-H at 5,000 sq. ft.; Horning at 2,900 sq. ft.; and Clackamas at 2,600 sq. ft.), and two arenas (Ely which is indoor and Rodeo which is outdoor). Amenities such as rentable horse stalls, restroom facilities, kitchens and office space are also available.

The Clackamas County Fair and Rodeo is the largest event at the Fairgrounds. Fair events are each given a specific theme. Previous themes have included: Fire Protection (1948), Golden Jubilee (1956), Art to Agriculture (1965), Our International Friends (1971), An Old-Fashioned Fair (1980), Best in the West (1996), Party with the Animals (2004) and Fair Fever! (2015).

Event revenue, facility leases and transient lodging taxes help to fund operations, maintenance and improvements of the Fairgrounds. The Clackamas County Fair Improvement Foundation, a non-profit organization, is also dedicated to improving the Fairground facilities.

## Purpose for the Market Assessment

In 2014, snow falling on the roof of the 1924 Livestock Barn created unsafe conditions structurally, so the barn was deconstructed that summer.<sup>2</sup> Temporary structures were put in its place for the upcoming fair. The loss of usable and rentable space triggered a response and call to action for a new facility. The purpose of this analysis to provide a preliminary evaluation of: (1) factors affecting demand, (2) existing and historical facility uses, and (3) projections of future demand as it relates to competition. The assessment provides preliminary information for consideration in the Master Plan about opportunities

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<sup>1</sup> Clackamas County Fairgrounds and Event Center. Mission Statement. Retrieved from: <http://www.clackamas.us/fair/>

<sup>2</sup> Clackamas County Fairgrounds and Event Center. History. Retrieved from: <https://www.clackamas.us/fair/history.html>

for increases to revenue from future events, for an assessment of financial feasibility in the full Master Plan.

## Factors Affecting Demand for Facilities at the Clackamas County Fairgrounds

Following is a summary of historical and current factors affecting usage of the Clackamas County Fairgrounds. Factors summarized are: 1) demographic trends, 2) economic trends, 3) tourism trends and 4) agricultural trends.

### Demographic Factors

From 2000 to 2017, Clackamas County’s population grew by 74,609 people (21%). By 2040 (from 2017), Clackamas County is expected to grow by another 20%, adding almost 130,000 people.

Population growth will drive demand for activities at the Fairgrounds as many of the events at the Fairgrounds are attended by people living in Clackamas County and surrounding areas. The composition of Clackamas County’s population may also drive activities at the Fairgrounds. For instance, the County will likely continue to become more ethnically diverse, which could increase demand for more culturally specific events such as Mexican rodeos or charreada, fiestas, and other private parties such as quinceañeras.

### Population

Clackamas County’s population increased by over 20% from 2000-2017 — consistent with the populations of Oregon and the Portland Region.

*Exhibit 1. Population, by Region, 2000- 2017*

Source: US Decennial Census 2000, 2010. PSU Population Research Center 2012. US Census Population Estimates 2012.

	2000	2010	2017	Change 2000 to 2017		
				Number	Percent	AAGR
Clackamas County	338,391	375,992	413,000	74,609	22%	1.2%
Portland Region	1,444,219	1,641,036	1,811,860	367,641	25%	1.3%
Oregon	3,421,399	3,831,074	4,141,100	719,701	21%	1.1%

From 2000 to 2017, Happy Valley's population growth of nearly 15,500 people accounted for 21% of Clackamas County's population growth. This is followed by growth in Wilsonville (13%) and Oregon City (12%).

*Exhibit 2. Population, Clackamas County Cities, 2000-2017*

Source: US Decennial Census 2000, 2010. PSU Population Research Center 2012. US Census Population Estimates 2012.

	2000	2010	2017	Change 2000 to 2017		
				Number	Percent	AAGR
Clackamas County	338,391	375,992	413,000	74,609	22%	1.2%
Barlow	140	135	135	-5	-4%	-0.2%
Canby	12,790	15,829	16,660	3,870	30%	1.6%
Estacada	2,371	2,695	3,280	909	38%	1.9%
Gladstone	11,438	11,497	11,840	402	4%	0.2%
Happy Valley	4,519	13,903	19,985	15,466	342%	9.1%
Johnson City	634	566	565	-69	-11%	-0.7%
Lake Oswego	35,278	36,845	37,490	2,212	6%	0.4%
Milwaukie	20,490	20,291	20,550	60	0%	0.0%
Molalla	5,647	8,108	9,610	3,963	70%	3.2%
Oregon City	25,754	31,859	34,610	8,856	34%	1.8%
Rivergrove	325	350	500	175	54%	2.6%
Sandy	5,385	9,570	10,855	5,470	102%	4.2%
West Linn	22,261	25,109	25,695	3,434	15%	0.8%
Wilsonville	14,365	18,095	24,315	9,950	69%	3.1%

The forecasted population will grow through 2040. Through 2040, Clackamas County's population, as a share of the population for the Portland Region, is expected to grow (at about 29%).

*Exhibit 3. Forecasted Population Growth, by Region, 2015-2040*

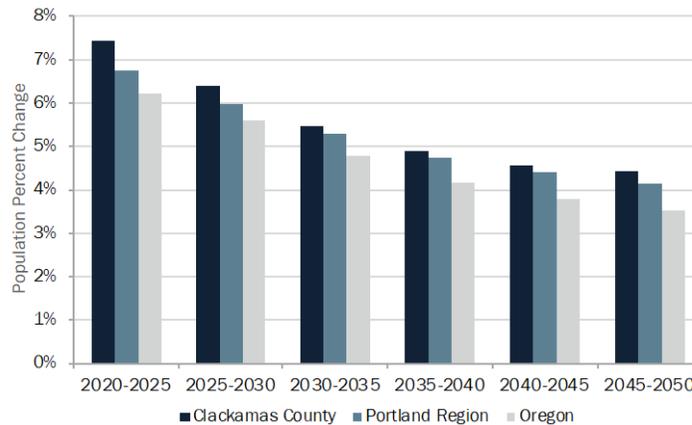
Source: Population Research Center, Portland State University, June 30, 2017, and Office of Economic Analysis, Department of Administrative Services, State of Oregon, March 28, 2013. Note: 'Portland Region' includes Clackamas, Multnomah, and Washington County.

	2015 - 2040	
	Population Growth	Percent Change
Clackamas (within Metro UGB)	79,766	29%
Clackamas	144,558	36%
Portland Region	587,428	34%
Oregon	1,189,155	30%

Clackamas County is forecast to grow faster than other regions. While forecasted population will continue to rise over time, the rate of growth will decrease; the county's population growth is forecast to slow from 7.4% in 2020-2025 to 4.4% in 2045-2050.

Exhibit 4. Percent Change in Forecasted Population Growth, by Region, 2020-2050

Source: Population Research Center, Portland State University, June 30, 2017, and Office of Economic Analysis, Department of Administrative Services, State of Oregon, March 28, 2013. Note: 'Portland Region' includes Clackamas, Multnomah, and Washington County.



## Age

Clackamas County's median age has increased by about four years since 2000.

Clackamas County's median age is older than the Portland Region's and Oregon's as a whole.

Exhibit 5. Median Age, 2000 to 2012-2016

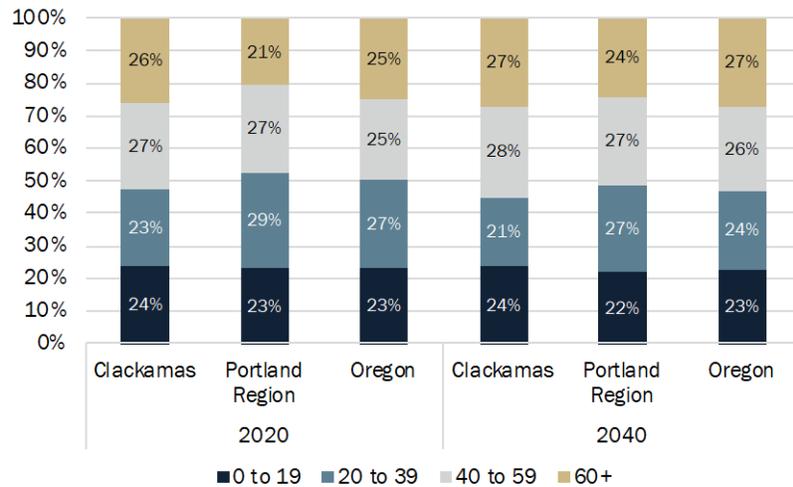
Source: U.S. Census Bureau, 2000 Decennial Census, Table P013; American Community Survey 2012-2016 5-year estimate, Table B01002.

2000	37.5 Clackamas County	34.9 Portland Region	36.3 Oregon
2012-2016	41.4 Clackamas County	37.6 Portland Region	39.1 Oregon

Clackamas County has a larger share of people over the age of 60 than the region. This trend will continue through 2040. Older demographics (seniors and grandparents with grandchildren) drive demand for fairground events.

Exhibit 6. Forecasted Age Distribution, by Region, 2020-2040

Source: Population Research Center, Portland State University, June 30, 2017, and Office of Economic Analysis, Department of Administrative Services, State of Oregon, March 28, 2013. Note: 'Portland Region' includes Clackamas, Multnomah, and Washington County.

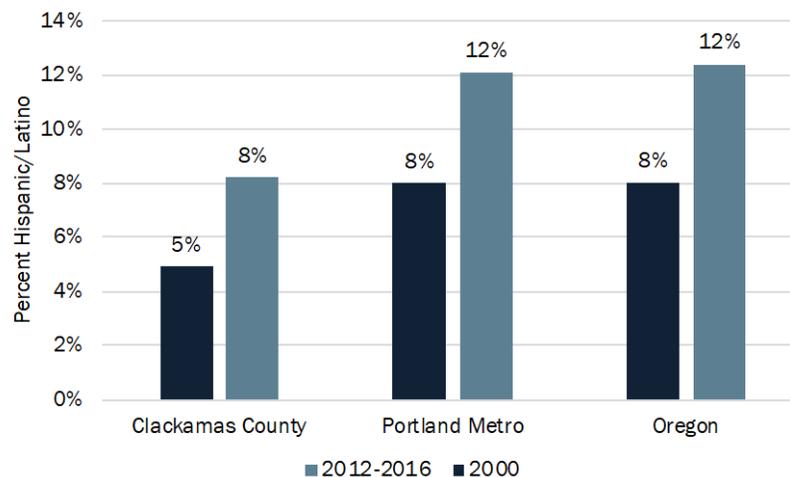


### Ethnicity

Clackamas County has become more ethnically diverse since 2000, while at a slower rate than the Portland Region and State. Since 2000, Clackamas County's Hispanic and Latino population grew by 15,759 people.

Exhibit 7. Change in Ethnicity (Hispanic/Latino), Clackamas County, Portland Region, Oregon, 2000 to 2012-2016

Source: U.S. Census Bureau, Decennial Census 2000, Table P008; American Community Survey, 2012-2016 5-year estimate, Table B01001. Note: 'Portland Region' includes Clackamas, Multnomah, and Washington County.

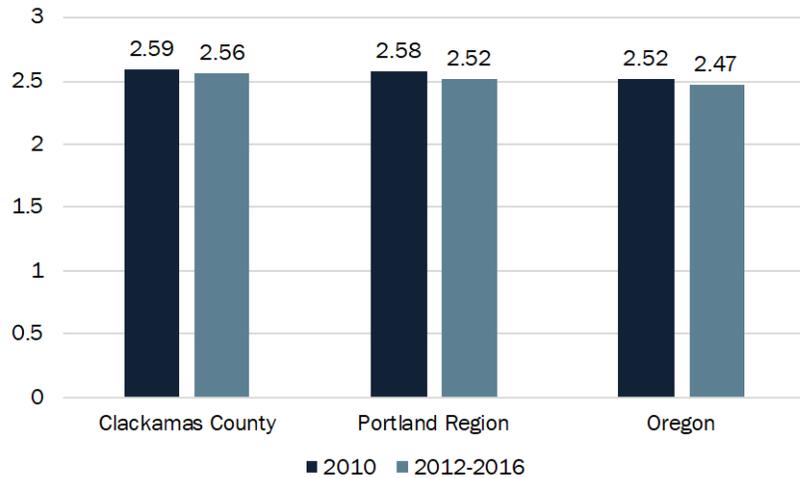


## Household Characteristics

The average household size for Clackamas County, the Portland Region, and Oregon decreased from 2010 to 2016.

*Exhibit 8. Change in Average Household Size, Clackamas County, Portland Region, Oregon, 2010 and 2012-2016*

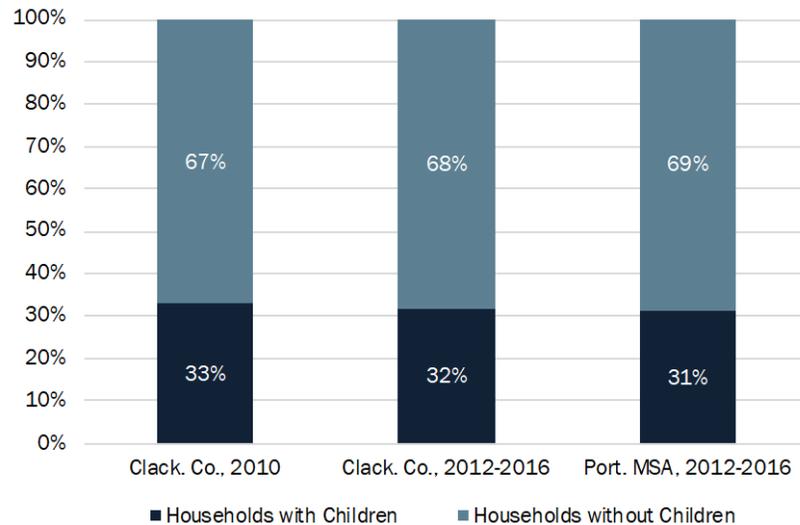
Source: U.S. Census Bureau, 2010 Decennial Census Summary File 1, Table H12; ACS 2012-2016 5-year estimate, Table B25010.



The share of households with children in Clackamas County has not changed since 2010. Household composition for the county is like that of the Metropolitan area.

*Exhibit 9. Change in Household Composition, Clackamas County and Portland MSA, 2010 and 2016*

Source: U.S. Census Bureau, 2010 Decennial Census Summary File 1, Table P20; ACS 2012-2016 5-year estimate, Table DP02.



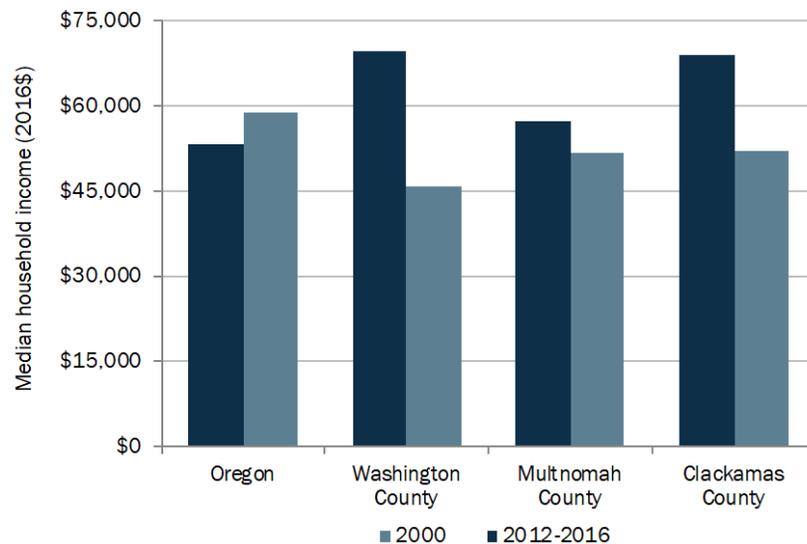
## Economic Trends

Since 2000, household income in Clackamas County has increased as has the number of residents employed in the County. The County possesses median incomes similar to that of Washington County and higher than that of Multnomah County and the state.

From 2000 to 2012-16, Clackamas County's median household income (MHI) grew by 32% from \$52,248 to \$68,915. In this same time, Multnomah County's MHI grew by 10%, Washington County's grew by 52%, and Oregon's decreased by 9%.

*Exhibit 10. Change in Median Household Income, Clackamas, Multnomah, Washington County, and Oregon (2016 inflation-adjusted dollars), 2000 to 2012-16*

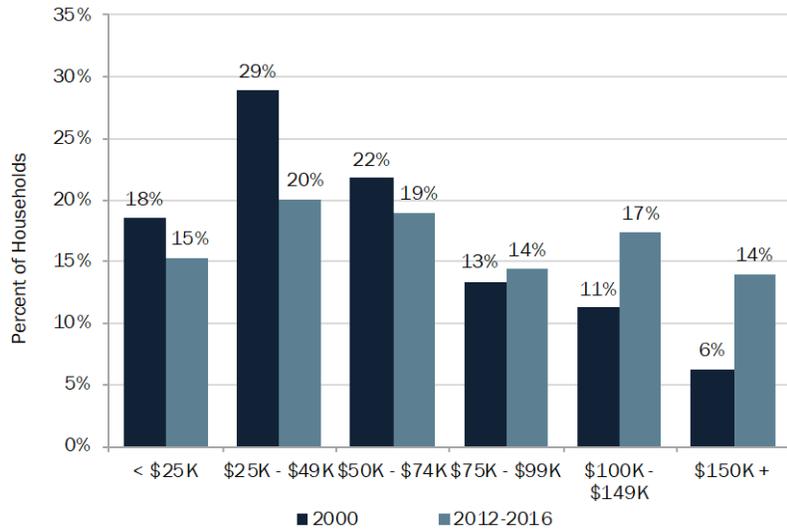
Source: U.S. Census Bureau, Decennial Census 2000, Table HCT012; American Community Survey, 2012-2016 5-year estimate, Table B25119.



The number of Clackamas County households making \$75,000 or more per year increased by 74% from 2000 to 2012-2016. In this same time, the number of households making less than \$50,000 per year decreased by 12%.

Exhibit 11. Change in Household Income Distribution, Clackamas County, 2000 to 2012-2016

Source: U.S. Census Bureau, Decennial Census 2000, Table DP-3; American Community Survey, 2012-2016 5-year estimate, Table B19001.



Ten cities in Clackamas County have median household incomes (MHIs) that fall below that of the County's. Three cities in Clackamas County have MHIs that fall below Oregon's MHI of \$53,270.

Exhibit 12. Median Household Income, 2012-2016

Source: U.S. Census Bureau, American Community Survey, 2012-2016 five-year estimate, Table B19013.

<b>\$68,915</b> Clackamas County	\$39,167 Barlow	\$62,035 Canby	\$50,757 Estacada
\$57,169 Gladstone	\$106,197 Happy Valley	\$33,083 Johnson City	\$89,979 Lake Oswego
\$55,880 Milwaukie	\$55,082 Molalla	\$65,548 Oregon City	\$106,875 Rivergrove
\$61,687 Sandy	\$89,806 West Linn	\$63,097 Wilsonville	

Over 2002 to 2016, Clackamas County's total covered employment grew by 18%, from about 134,000 employees to 158,000 employees.

Exhibit 13. Covered Employment, 2002-2016

Source: Bureau of Labor Statistics, Quarterly Census of Employment and Wages.

			Change 2000 to 2017		
	2002	2016	Number	Percent	AAGR
Clackamas County	133,958	157,789	23,831	18%	1.2%
Multnomah County	428,913	492,062	63,149	15%	1.0%
Washington County	221,563	283,114	61,551	28%	1.8%

## Tourism Trends

New tourism opportunities and trends may impact visitors or events at the Fairgrounds in the future. Stakeholders provided some input into what these trends might be. They indicated that there is burgeoning interest in microbreweries, that rodeo events are becoming more popular across a wider demographic, and that kid-oriented events will continue to impact visitation. Input also suggested the importance of monitoring the interests of millennials and next generations. The Fair event needs to remain traditional — as people want to keep their fingers on the pulse of the rural culture. But, *other* events could cater to new or changing preferences.

To complement stakeholder input, this section summarizes tourism trends in Clackamas County from research conducted by *Dean Runyan Associates: Oregon Travel Impacts*<sup>3</sup> and visitor trends in the Greater Portland Region from Longwoods International's *Oregon 2015 Regional Visitor Report*.<sup>4</sup> Broadly, travelers to the Greater Portland Region account for:

- 10.6 million overnight trips annually; 32% of Oregon Travel.
- Primary home market area for travelers is Oregon, Washington, California and Idaho: 30% of Greater Portland Region visitors are from Oregon; 27% are from Washington; 16% are from California; and 4% are from Idaho.
- 50% stayed 2 or fewer nights; 35% stayed 3-6 days; and 15% stayed 7 or more days.
- Average per person expenditures on overnight trips range from \$12 to \$50 per night.
- About 66% of visits are by personally owned automobiles; 22% travel by rental car; 3% travel by RV.
- Visitors tend to be well-educated and young to middle-aged; over half have college degrees; 44% of visitors are ages 25 to 44 and 30% of visitors are 45 to 64.
- A majority of visitors (43%) earn less than \$50k annually, 21% earn between \$50k and \$75k, and 15% earn between \$75k and \$100k. The remaining 21% earn over \$100k.

<sup>3</sup> Dean Runyan Associates. (2018). Oregon Travel Impacts: Statewide Estimates 1992-2017p.

<sup>4</sup> "Oregon 2015 Regional Visitor Report, Greater Portland Region," Longwoods International, 2015.

Clackamas County's direct travel spending increased 82% from 2000 to 2017.

The Portland Metro Region's direct travel spending increased by 89% over the same period.

Exhibit 14. Direct Travel Spending (\$ millions), 2000, 2010, and 2017

Source: Dean Runyan Associates, Oregon Travel Impacts, 2000-2017. Note: The Portland Region encapsulates the Western portion of Clackamas County, as defined by Dean Runyan Associates.

2000	\$2,700 Portland Metro Region	\$337 Clackamas County
2010	\$3,600 Portland Metro Region	\$460 Clackamas County
2017	\$5,100 Portland Metro Region	\$613 Clackamas County
Change (2000 to 2017)	89%	82%

Clackamas County's lodging tax receipts increased 72% from 2007 to 2017.

Exhibit 15. Lodging Tax Receipts (\$ millions, nominal), 2007 and 2017

Source: Dean Runyan Associates, Oregon Travel Impacts, 2007 and 2017.

2007	\$3.6 Clackamas County
2017	\$6.2 Clackamas County
Change (2007 to 2017)	72%

Clackamas County's visitors spend the most of their expenses on food services.

*Exhibit 16. Largest Visitor Spending Categories (\$ millions), Clackamas County, 2017*

Source: Oregon Travel Impacts.

\$173.1	\$106.2	\$100.0	\$56.6
Food Service	Accommodations	Retail Sales	Arts, Ent., & Rec.

The Accommodations and Food Service industry is most impacted with job growth due to employment generated by travel spending.

*Exhibit 17. Largest Industry Employment Generated by Travel Spending, Clackamas County, 2017*

Source: Oregon Travel Impacts.

4,100 jobs	1,200 jobs	600 jobs	300 jobs
Accommodations & Food Service	Arts, Entertainment. & Recreation	Retail	Other Travel

## Equestrian-related Tourism and Events

Equestrian activities are prominent at the Clackamas County Fairgrounds, throughout the county and in Oregon. Equine activities such as horseback riding through wine country, coastal riding, scenic day-riding, rodeos, and other horse shows are very popular. With 167,928 horses in Oregon, these activities do not just draw visitors but locals alike.<sup>5</sup>

Across the state and in Clackamas County, visitors will find plenty of stables, arenas and trails ripe for horseback riding. In addition, a range of organizations across the state arrange public and private events and then invite performance and leisure riders to participate or attend as audience members. As these organizations market their industry, they positively impact the state's equestrian tourism market. They also add benefit to the facilities they rent out for their events or programs. Some of these organizations / clubs include:

- **Back Country Horsemen of Oregon:** A 501(c)3 non-profit that plays a local advocacy role (e.g. teaches "Leave No Trace" ethics and lobbies for continued access of pack and saddle stock in Oregon's backcountry). The organization has multiple chapters, each hosting group get-togethers and meetings. Additionally, advertised on their events calendar are trail skills programs, campouts and riding parties.

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<sup>5</sup> The American Horse Council. (2005). Most Comprehensive Horse Study Ever Reveals Nearly \$40 Billion Impact on the U.S. Economy.

- **Northwest Miniature Horse Club:** An organization founded in the early 1980s that sponsors annual shows throughout Washington and Oregon. The organization's 2018 calendar showcases seven events.
- **Oregon Family Equestrian Activities:** A membership organization that hosts performance horse events across the state. Its 2018 events calendar listed 28 events, some occurring over multiple days. The organization also hosts an annual awards banquet; 2018 was their 17<sup>th</sup> annual banquet.
- **Oregon High School Equestrian Teams:** A high school athletic program that exists at various school districts throughout the state. The organization hosts events, fundraisers and symposiums.
- **Oregon Paint Horse Club:** A club that represents a national association that hosts horse shows and sponsors an end-of-year awards program.
- **Team NW Equestrian Sports:** An organization which organizes and hosts competitive horse shows. Its events calendar from June through September lists nine two-day events in Wilsonville, OR.

Equestrian facilities provided by counties in Oregon attract community members and tourists. An analysis of equestrian/equine tourism in Wilsonville, OR (located in Clackamas County) found insights into the types of people that attend equine events<sup>6</sup>:

- **Higher Income.** 'Horse people' identified as an affluent, high-spending, frequently traveling visitor market (horse owners/riders).
- **Generate Overnight Tourism Revenues.** Overnight show competitors spend an average of \$150 to \$200 per day, per person (American Horse Council).
- **Predominantly Female.** Horses are particularly popular with female audiences. Women are the main influencers of these travel decisions. Profiling Horse show attendees in Wilsonville seem to suggest women aged 40 to 65 are a target audience. Many have ridden at some point in their life or grew up loving horses. Actual event participants seem to fall into the 19- to 35-year range.
- **Mixed Interest Levels.** The percentage of 'horse people' to non-horse people attending events is estimated to be about 50/50.
- **Atmosphere Seeking.** U.K. research suggests that these high-spending equine tourists are seeking "atmosphere" — beautiful natural surroundings next to riding trails if possible, and readily available information, amongst other things.

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<sup>6</sup> Total Destination Marketing. (2013). Wilsonville Tourism Development Strategy: Fieldwork Research Report.

International travelers also want to feel involved with the people and area. (UK Travel Trends research 2005).

Equestrian activity and tourism generate positive economic impacts in Wilsonville. A report quantifying their impacts found<sup>7</sup>:

- The estimated value of Wilsonville's Country Classic Horse Show (one show) is \$450,000 or more.
- Wilsonville's series of six summer horse shows generate an estimated economic impact of more than \$10,800,000. This estimated number is for competitor visitors only and does not include the thousands of day visitors and spectators.
- Every horse entered in the Wilsonville horse shows brings an average of three to seven people with them, depending on the discipline.

In the stakeholder survey for the Clackamas County Fairgrounds, stakeholders suggested a need for more equine events and activities. Many commented on the need to update facilities to attract larger trade shows and bigger equestrian events to the Fairgrounds. One stakeholder specifically explained that "from a horse rider standpoint - the indoor arena is nice, it would be better to have a little bigger warmup arena & more gravel parking for winter events." Another stakeholder suggested "a big barn with horse stalls on the off season for more boarding" and further commented that it could serve a dual role for housing livestock at the fair. Finally, one stakeholder expressed hopes that the Fairgrounds remains available for open riding and rentable for horse events as, in the stakeholder's words, "it's getting hard to find arenas anymore."

## **Agritourism**

Agritourism are economic activities that link travel/activities with agriculture/food services. The Clackamas County Fairgrounds is a participant within the agritourism industry. Growth in agritourism may increase interest in agricultural activities at the Clackamas County Fairgrounds.

The following section lists key agritourism market trends, as identified and summarized from Travel Oregon's Agritourism Handbook in Oregon<sup>8</sup>:

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<sup>7</sup> Total Destination Marketing. (2013). Wilsonville Tourism Development Strategy: Fieldwork Research Report.

<sup>8</sup> Travel Oregon. Why Consider Agritourism? Market Trends for Agritourism: Information from other Regions. [http://industry.traveloregon.com/content/uploads/2017/06/01\\_Market\\_Trends\\_for\\_Agritourism.pdf](http://industry.traveloregon.com/content/uploads/2017/06/01_Market_Trends_for_Agritourism.pdf)

### Social Trends that Favor Agritourism

- Growing interest in nutrition, health and safety, environmental resiliency, food systems and buying local.
- Emergent social preferences for “making/makers” (i.e. DIY) versus consumption.
- Growing interest in the pursuit of food and travel as a cultural experience. Viniculture is an example of one such culinary experience on the rise, particularly seen in the growth of interest in wine trails.
- Increasing inclinations to unplug from technology, paired with nostalgia for traditional skills and lifestyles.

### Demographics that Favor Agritourism

- The Washington State Extension reports that “the primary audiences for agritourism are **families** seeking fun and educational activities, **seniors** and **children’s groups**... Local people from nearby rural areas tend not to visit local agritourism sites except when hosting family or friends from out of town—if they consider your place a ‘must see’ activity. **Locals** do participate in festivals or tours especially designed for them.”<sup>9</sup>
- A majority of agritourists are urban dwellers making day trips within a 40-mile radius of their homes.<sup>10</sup>
- It is becoming increasingly common for grandparents to travel with their grandchildren, highlighting another opportunity for agritourism.
- Agritourism participants incline toward being well-educated (33% have at least a bachelor’s degree, compared with 20% of the nation’s population). They also tend to have modest income levels.

### Economics of Agritourism

The Oregon Arts Commission reports that “connecting agritourism with heritage and cultural travelers creates more opportunities for revenue, as these travelers spend more and stay longer in a destination than other travelers.”<sup>11</sup>

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<sup>9</sup> WA State Extension. Agritourism: Cultivating Tourists on the Farm. Retrieved: Travel Oregon.

<sup>10</sup> USDA 2007 Agricultural Resource Management Survey, Farm-based Recreation Report. Retrieved: Travel Oregon. Why Consider Agritourism? Market Trends for Agritourism: Information from other Regions.

<sup>11</sup> Oregon Arts Commission (2006). Exploring Authentic Oregon: The Importance of Cultural Tourism. Retrieved: Travel Oregon.

The Oregon Bounty report shows that “research revealed that half of all Oregon tourists bought local food products, and two thirds bought such products to take home. They spent an average of \$142 on such products.”<sup>12</sup>

## Agricultural Trends

Many use the U.S. Department of Agriculture’s Census to understand the status of agricultural production in the community as well as to determine the location of facilities that may benefit those within the industry. Such agricultural trends could have implications for vendor participation in animal-related events held at the Fairgrounds in future years.

Except for milk cows and chickens (raised for meat), the production of livestock in Clackamas County has decreased from 2002 to 2012.

*Exhibit 18. Change in Livestock Production (in numbers), Clackamas County, 2002 and 2012*

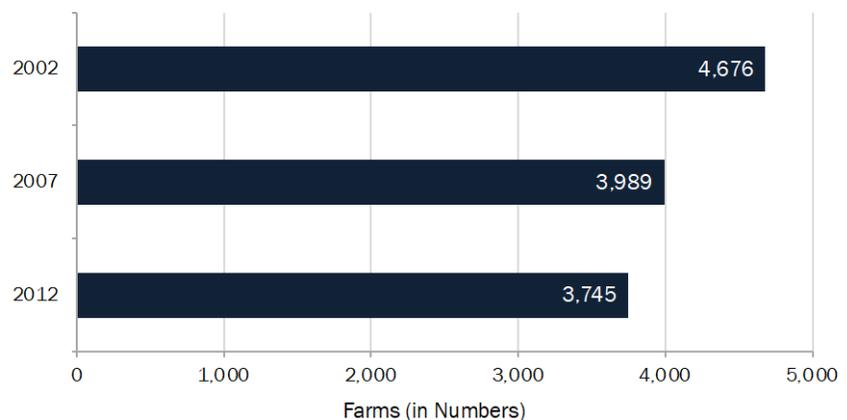
Source: United States Department of Agriculture Census, County Summary, Table 1.

	-21%	21%	-72%
2002 to	Beef Cows	Milk Cows	Hogs and Pigs
2012	-25%	3%	
	Sheep and Lambs	Meat-Type Chickens	

From 2002 to 2012, the total number of farms in Clackamas County has decreased by 20%. Farm acreage has also decreased by 24% in that same time.

*Exhibit 19. Total Farms, Clackamas County, 2002, 2007, and 2012*

Source: United States Department of Agriculture Census, County Summary, Table 1.



<sup>12</sup> Suzanne Cook Consulting, LLC. (2011). Oregon’s Bounty Visitor Behavior and Attitudes Related to Oregon Products.

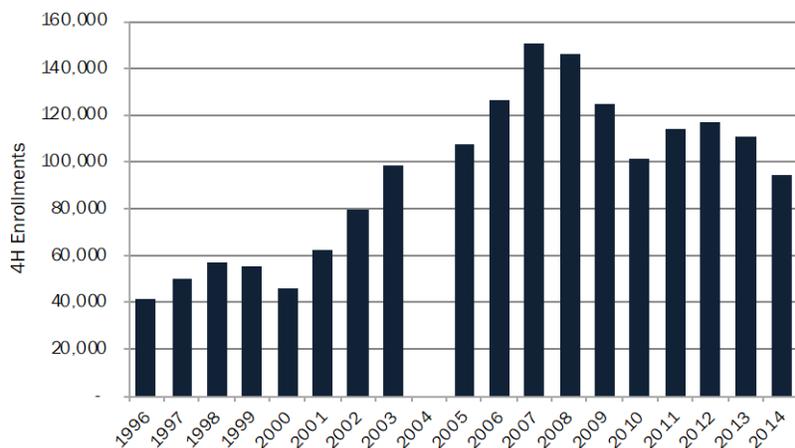
In a report titled, “The Future of Oregon’s Agricultural Land,” agricultural community stakeholders indicated concerns over the rate at which farmland is being converted to non-farm use, rapidly rising farmland prices, more limited opportunities to gain farming experience, high-startup costs for new farms, and systematic barriers that exclude women and people of color from farming.<sup>13</sup> This same report also explains that Oregon farmers are becoming older on average and that fewer young people are entering farming.

The factors listed above could affect event attendance at the Fairgrounds, particularly for animal- and livestock-related events or other events that cater toward agricultural traditions. For instance, thousands of youth are enrolled in Oregon’s 4-H program, an out-of-school youth program dedicated to helping individuals aged 5 to 18 gain important skills and confidence.<sup>14</sup> The program offers hands-on learning in topic areas such as agriculture. While enrollment rates have slowed in recent years, the number of participants still suggests mass interest in the activities the program offers. In Clackamas County, more than 5,000 youth participate.<sup>15</sup> According to the most recent enrollment data for Oregon (2014), Clackamas County works with about 5% of the State’s 4-H participants.

In Oregon, 4-H enrollment increased from about 41,000 enrollments in 1996 to its peak of about 150,000 enrollments in 2007. As of 2014, Oregon had about 94,000 youth enrolled in 4-H.

*Exhibit 20. 4-H Enrollment, Oregon, 1996-2014*

Source: REEIS, United States Department of Agriculture, National 4-H Enrollment Report.



<sup>13</sup> Oregon State University Center for Small Farms and Community Food Systems, Portland State University, Rogue Farm Corps. Summary: The Future of Oregon’s Agricultural Land.

<sup>14</sup> REEIS, National 4-H Enrollment Report. <https://reeis.usda.gov/reports-and-documents/4-h-reports>

<sup>15</sup> Oregon State University Extension Service. <http://extension.oregonstate.edu/clackamas/4h>

# Historical and Current Uses of the Clackamas County Fairgrounds

This section explains how the Clackamas County Fairgrounds is used.

## Fairgrounds Facilities

The Clackamas County Fairgrounds has seven primary buildings. Exhibit 21 shows the capacity and rental rates for each facility. Note that the Main Pavilion only includes the capacity and rate for the main room, annex and kitchen.

*Exhibit 21. Key Facility Capacity and Rental Rates, Clackamas County Fairgrounds, 2018*

Source: Clackamas County Fairgrounds.

Facility	Capacity (People)	Sq. Ft.	Rental Rate	Cost per Sq. Ft.
Main Pavilion	200 to 533	7,000	\$3,000	\$0.43
4H Hall	350	5,000	\$2,500	\$0.50
Clackamas Hall	95	2,600	\$600	\$0.23
Horning Hall	200	2,900	\$1,000	\$0.34
Ely Arena	N/A	25,000	\$850	\$0.03
Rodeo Arena	4,000	45,375	\$8,000	\$0.18
Rabbit Barn	N/A	9,480	\$600	\$0.06

## Events and Attendance

Different events held at the Fairgrounds will draw specific crowds (i.e., different demographics or people with varying interests). Well-performing events may create repeat attendance. The ability to host multiple events on the same day creates critical mass, which adds to a festival-like atmosphere that many people seek. Keeping these factors in mind helps to paint the picture for why some events pull larger crowds than others.

The following are key findings of facility and event usage over the last three complete fiscal years. These findings are based on event data from the Clackamas County Fairgrounds and Event Center staff.

- While the Clackamas County Fair event is an important event, many other events take place at the Fairgrounds year-round. The Fair event itself accounts for less than 10% of the Fairground’s annual attendance.
- Over the last few years, the total number of events (including paid events) have decreased slightly. In addition, along with fewer events, and noting that a single event can take place over multiple days, total event days booked per fiscal-year has also decreased slightly.

- Year-to-year, the share of events (categorized into five broad categories: 4-H, Animal, Equestrian, Fair Event, Miscellaneous Events and Sheriff Posse) has remained relatively static. Still, from 2014-2015 to 2016-2017, Equestrian, Sherriff Posse and Miscellaneous Events decreased (-5%, -5%, -31%) while 4-H and Animal events increased (12%, 32%).
- People use the Ely Arena (25,000 sq. ft.) and Clackamas Hall (2,600 sq. ft.), the Fairground's smaller Hall and Arena, more frequently.

Hundreds of events take place at the Clackamas County Fairgrounds each year.

*Exhibit 22. Total Events, Clackamas County Fairgrounds, 2014-2015, 2015-2016, and 2016-17*

Source: Clackamas County Fairgrounds and Event Center.

365	380	326
2014-2015	2015-2016	2016-2017

From 2014-2015 to 2016-2017, a larger share of total events took place in the Spring (March, April and May). Fewer events occur in the Summer (June, July, August), when the annual Clackamas County Fair event is held.

*Exhibit 23. Share of Total Events by Season, 2014-2015, 2015-2016, and 2016-2017*

Source: Clackamas County Fairgrounds and Event Center.

26%	30%	20%	24%
Winter	Spring	Summer	Fall

Between 2014-2015 and 2016-2017, total event attendance decreased by 9% or 8,231 people. Fair attendance also decreased, by 13% or 886 people.

*Exhibit 24. Attendance at Events (Snapshot), 2014-2015, 2015-2016, and 2016-2017*

Source: Clackamas County Fairgrounds and Event Center.

Attendance (All Events)	93,883	88,158	85,652
Attendance (Fair-Related Events)	6,712	8,112	5,826
Attendance Fair-Related Events (% of All Events)	7%	9%	7%
	2014-2015	2015-2016	2016-2017

The Clackamas County Fair, which takes place in the summer, is a big event, drawing huge crowds. That said, the Annual Fair is an event that lasts about a week. Stakeholders participating in interviews indicated the types of activities and events that the Fairgrounds should try and attract during non-fair times. Activities suggested include microbrewery festivals; home and remodel trade shows, boat shows; car clubs; speakers and lecturers; tack sales; birthday parties and weddings; and summer or church camps. Some suggested

that if the Fairgrounds built a new main building, they could also host conventions, conferences and concerts.

Youth events account for about 10% of attendance across all events.

*Exhibit 25. Attendance at Events (Detailed), 2014-2015, 2015-2016, and 2016-2017*

Source: Clackamas County Fairgrounds and Event Center.

Fiscal Year	Youth Event Attendees	Public Event Attendees	Volunteers	Other / Unknown	Total
2014-2015	-	-	4%	96%	93,883
2015-2016	9%	71%	8%	12%	88,158
2016-2017	8%	78%	7%	7%	85,652
<b>TOTAL</b>	<b>16,662</b>	<b>293,413</b>	<b>21,874</b>	<b>108,439</b>	<b>440,388</b>

## Event Types

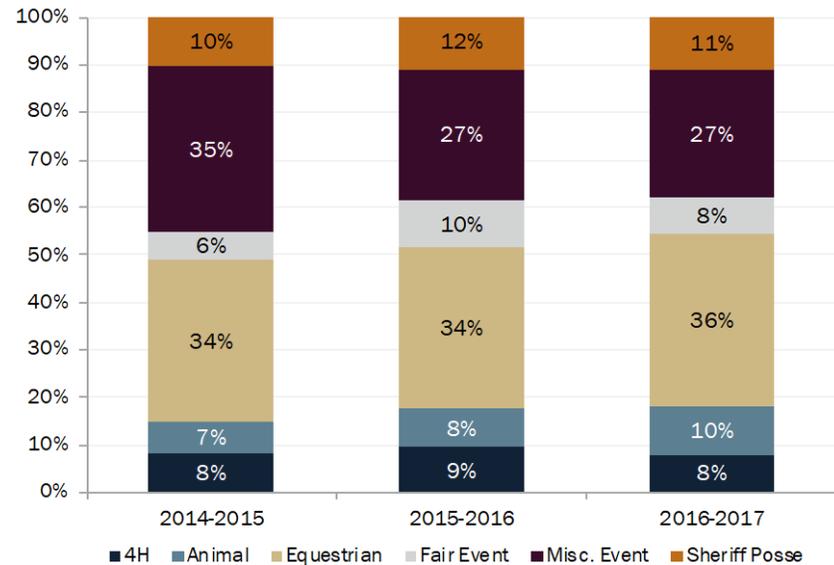
The types of events at the Fairgrounds are:

- **4-H Events**, such as horse judging, weigh-ins, recruitment meetings, animal shows, contests, etc. These events are generally single-day events, but some span multiple days (e.g. 4-H Horse Fair, tack sale, etc.). Attendance ranges from about 15 people to several thousand, and averages about 500 people per event.
- **Animal Events**, such as club / organization meetings and animal shows. These events are generally single-day events. Attendance ranges from about 15 people to several thousand, and averages about 350 people per event.
- **Equestrian Events**, such as such as Oregon High School Equestrian Teams practices, other racing club practices, rodeos, horse shows, etc. These events are generally single day events. Attendance ranges from about 15 people to about 2,000, and averages about 60 people per event.
- **Fair-Related Events**, such as Fair Board meetings and work sessions, auditions and fair set-up and the Fair and Rodeo. These events are generally single-day events (for planning purposes activities leading up to the Fair) and the actual Fair and Rodeo spans multiple days. Attendance ranges from about five people (for planning related events), to several thousand (for the actual fair).
- **Miscellaneous Events**, such as weddings, private parties, ceremonies, public events (e.g. scavenger hunts or Easter egg hunt, cook-offs, gem shows, etc.), dinners and auctions, and expos. These events are generally single-day events, but some span multiple days. Attendance ranges from about five to 15 people and maxes out around several thousand. Average attendance for miscellaneous events is about 500 people per event.
- **Sherriff Posse Events**, such as meeting, and ride nights. These events are generally single-day events, with attendance rates around 25-30 people.

Equestrian activities traditionally make up a larger portion of total events at the Fairgrounds. From 2014-2015 to 2016-2017, the percent of Sheriff Posse, Fair, Equestrian, Animal and 4-H events have remained relatively unchanged (3% difference or less). In this same time, the number of miscellaneous events has decreased (8% difference).

Exhibit 26. Distribution of Events by Type, 2014-2015, 2015-2016, and 2016-2017

Source: Clackamas County Fairgrounds and Event Center. Note: Misc. Events are all events that are not 4-H, Animal, Equestrian, or Sheriff Posse related). Fair Events include all fair-related events (such as planning meeting, set-up, etc.).



From 2014-2015 to 2016-2017, the total number of events with animals grew. In this same time, the total number of events for all other event types decreased.

Exhibit 27. Percent Change of Number of Events by Types, 2014-2015 to 2016-2017

Source: Clackamas County Fairgrounds and Event Center. Note: Misc. Events are all events that are not 4-H, Animal, Equestrian, or Sheriff Posse related). Fair Events include all fair-related events (such as planning meeting, set-up, etc.).

	Animal Related	Sheriff Posse	Eques.	4-H	Misc.
2014-15 to 2016-17					
Percent Change	<b>32%</b>	<b>-5%</b>	<b>-5%</b>	<b>-13%</b>	<b>-31%</b>
Difference in Number of Events	<b>8</b>	<b>-2</b>	<b>-6</b>	<b>-4</b>	<b>-39</b>

## Facility Usage

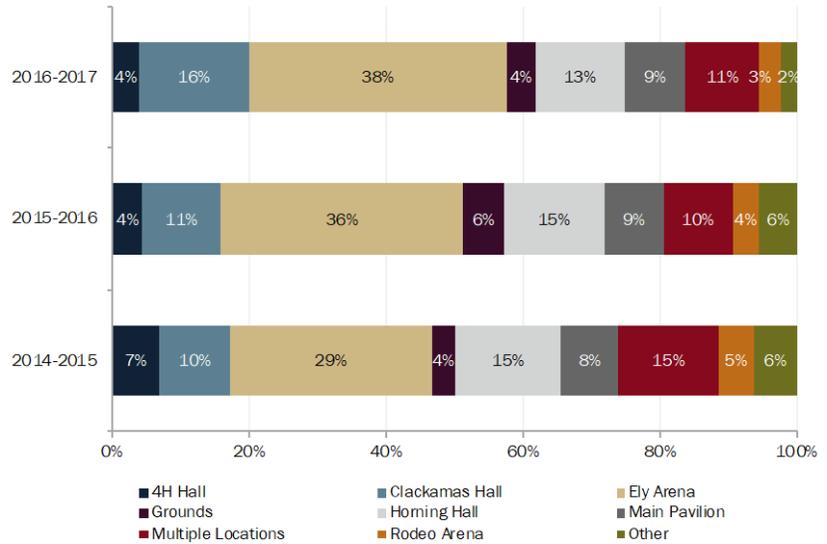
Facility capacities and available amenities contribute to usage levels. For example, larger facilities can hold more people and host more grandeur events. Smaller facilities, however, can host intimate gatherings. Flexible spaces offer special opportunities to host a gamut of events that traditional venues and event spaces cannot hold.

More events are increasingly hosted at the Ely Arena and Clackamas Hall.

Other facilities have remained relatively static, only fluctuating some between fiscal years.

Exhibit 28. Percent of Total Events Held at Fairgrounds Facilities, 2014-2015, 2015-2016, and 2016-2017

Source: Clackamas County Fairgrounds and Event Center.



In last Fiscal Year (2016-2017), a majority of events in the Main Pavilion, 4-H Hall, Clackamas Hall and Ely Arena generated revenue.

From FY 2015-2016 to 2016-2017, fewer events in the Main Pavilion, Clackamas Hall, Ely Arena and Rodeo Arena generated revenue.

Exhibit 29. Paid or Unpaid Events by Fairgrounds Facilities, 2015-2016 and 2016-2017

Source: Clackamas County Fairgrounds and Event Center. Note: ECONorthwest created this Exhibit with available data: Not all events had annotations about whether the rentals were paid for an unpaid rentals and data were not available for FY 2014-2015.

	FY 2015-2016		FY 2016-2017	
	Paid	Unpaid	Paid	Unpaid
Main Pavilion	76%	24%	69%	31%
4H Hall	41%	59%	54%	46%
Clackamas Hall	74%	26%	63%	37%
Horning Hall	29%	71%	35%	65%
Ely Arena	96%	4%	91%	9%
Rodeo Arena	33%	67%	11%	89%
Total	72%	28%	70%	30%

Exhibit 30 and Exhibit 31 show that a majority of all events take place on Saturdays, but that weekdays also have a large number of events. This finding is attributed to the types of events held at the Fairgrounds. For instance, meetings are a very common event held at the Fairgrounds and they take place primarily on weekdays.

The most popular day to host an event at the Fairgrounds is Saturday. Mondays are least popular.

*Exhibit 30. Events Held by Day of the Week, Clackamas County Fairgrounds, 2014-2015, 2015-2016, and 2016-2017*

Source: Clackamas County Fairgrounds and Event Center. Note: Some events are held on more than one day. This Exhibit shows event days—not just events, (a single event could be held over multiple days).

	2014-2015	2015-2016	2016-2017
Monday	42	42	27
Tuesday	65	56	58
Wednesday	77	66	59
Thursday	83	76	65
Friday	73	52	60
Saturday	131	101	79
Sunday	86	45	33

More than 60% of all events take place Monday through Friday.

*Exhibit 31. Share of Events, Week Day vs. Weekend, Clackamas County Fairgrounds, 2014-2015, 2015-2016, and 2016-2017*

Source: Clackamas County Fairgrounds and Event Center. Note: Some events are held on more than one day. This Exhibit shows event days (a single event could be held over multiple days).

	2014-2015	2015-2016	2016-2017
Weekday	61%	67%	71%
Weekend	39%	33%	29%

The following two exhibits break down events held by day of the week and by facility. Exhibit 32 looks at specific days that events are held. In FY 2014-2015, Saturdays and Sundays were the most popular day to host events. In more recent fiscal years, the number of events hosted on Saturdays and Sundays have decreased for all facilities with the exception of the Ely Arena.

Exhibit 33 breaks down events by facility into two categories: weekdays and weekends. For most facilities, weekdays are more popular (as similarly illustrated in Exhibit 31). Increasingly, weekdays are becoming more popular. For example, the share of events in Horning Hall on weekdays increased to 84% (FY 2016-17) from 59% (FY 2014-15), a difference of 24%. The share of events in the Main Pavilion on weekdays increased to 67% (FY 2016-17) from 51% (FY 2014-15), a difference of 17%.

In fiscal year 2016-2017, events held at the Rodeo Arena and 4-H Hall were relatively split between weekdays and weekends.

Exhibit 32. Facilities Usage by Day of the Week, 2014-2015, 2015-2016 and 2016-2017

Source: Clackamas County Fairgrounds and Event Center.

	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday	Total
<b>FY 2014-15</b>	<b>31</b>	<b>35</b>	<b>56</b>	<b>47</b>	<b>43</b>	<b>91</b>	<b>63</b>	<b>366</b>
Main Pavilion	7	6	6	7	14	25	14	79
4H Hall	2	2	3	1	7	16	3	34
Clackamas Hall	9	10	10	1	1	6	3	40
Horning Hall	3	7	11	16	1	12	14	64
Ely Arena	8	7	24	18	17	20	24	118
Rodeo Arena	2	3	2	4	3	12	5	31
<b>FY 2015-16</b>	<b>30</b>	<b>49</b>	<b>57</b>	<b>58</b>	<b>35</b>	<b>68</b>	<b>27</b>	<b>324</b>
Main Pavilion	3	2	4	8	10	20	3	50
4H Hall	1	1	1	2	1	11	4	21
Clackamas Hall	9	14	8	5	2	6	-	44
Horning Hall	5	5	14	25	1	3	4	57
Ely Arena	11	26	30	17	19	20	14	137
Rodeo Arena	1	1	-	1	2	8	2	15
<b>FY 2016-17</b>	<b>20</b>	<b>46</b>	<b>52</b>	<b>57</b>	<b>46</b>	<b>56</b>	<b>22</b>	<b>299</b>
Main Pavilion	3	5	4	3	16	11	4	46
4H Hall	1	1	1	1	4	7	2	17
Clackamas Hall	6	17	6	14	4	5	-	52
Horning Hall	2	2	11	18	3	4	3	43
Ely Arena	6	20	30	20	17	24	12	129
Rodeo Arena	2	1	-	1	2	5	1	12

Generally, across each Fiscal Year and facility, weekdays are more popular times to book events at the Fairgrounds. That said, the Rodeo Arena only recently (FY 2016-2017) saw a shift toward weekday bookings. The 4-H Hall has also seen some variability in popular booking days in the last three Fiscal Years.

Exhibit 33. Share of Facility Usage (Total Event Days), Weekday vs. Weekend, 2014-2015, 2015-2016 and 2016-2017

Source: Clackamas County Fairgrounds and Event Center.

	Facility	Weekday	Weekend
FY 2014-15	Main Pavilion	51%	49%
	4H Hall	44%	56%
	Clackamas Hall	78%	23%
	Horning Hall	59%	41%
	Ely Arena	63%	37%
	Rodeo Arena	45%	55%
FY 2015-16	Main Pavilion	54%	46%
	4H Hall	29%	71%
	Clackamas Hall	86%	14%
	Horning Hall	88%	12%
	Ely Arena	75%	25%
	Rodeo Arena	33%	67%
FY 2016-17	Main Pavilion	67%	33%
	4H Hall	47%	53%
	Clackamas Hall	90%	10%
	Horning Hall	84%	16%
	Ely Arena	72%	28%
	Rodeo Arena	50%	50%

## Fairgrounds Budget

Approximately 35% of the Clackamas County Fairgrounds and Event Center (CCFEC)'s annual budget goes toward the Fair & Rodeo. The remaining 65% goes toward the Events Center. The next Exhibit shows revenues and expenditures for the Events Center for FY 2015-2016 and 2016-2017.

From FY 2015-2016 to FY 2016-2017, revenues increased by 9% and expenditures decreased by 7%.

*Exhibit 34. Clackamas County Events Center Budget, FY 2015-2016 and FY 2016-2017*

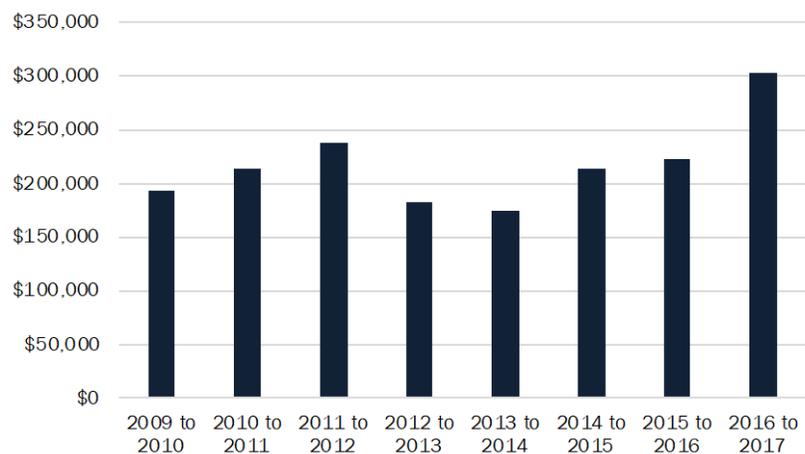
Source: Clackamas County Fairgrounds and Events Center, Budget Actuals. Note: Events Center budget is 65% of the CCFEC budget.

	FY 2015-2016 (Actual)	FY 2016-2017 (Actual)
<b>Revenues</b>		
Fund Balance Prior Year End	\$158,679	\$129,558
Local Grants	\$2,000	\$3,111
Miscellaneous Revenue	\$265	\$0
Interest Earned	\$1,835	\$0
Facility Rentals	\$221,260	\$303,530
Property Rental Income	\$17,460	\$19,750
Contributions and Donations	\$0	\$10,138
Misc. Sales - Highway Sign Advertising	\$8,030	\$5,766
Transient Room Tax	\$288,639	\$292,104
<b>Total Revenues</b>	<b>\$698,168</b>	<b>\$763,957</b>
<b>Expenditures</b>		
Personnel Services	\$356,253	\$296,484
Materials and Services	\$208,783	\$188,714
Capital	\$3,573	\$46,408
Contingency	\$0	\$0
<b>Total Expenditures</b>	<b>\$568,610</b>	<b>\$531,606</b>

In recent fiscal years, revenue from facility rentals increased.

*Exhibit 35. Historical Facility Rental Revenues, FY 2009-2010 through FY 2016-2017*

Source: Clackamas County Fairgrounds and Event Center, Budget Actuals. Note: Revenues account for the full CCFEC Budget, not solely the Event Center Budget.



## Stakeholder Input about Future Improvements to the Facilities

Stakeholder interviews provided context on the Fairgrounds site and facility. Information provided helps to explain historical and current usage levels at the Fairgrounds. For instance, stakeholders suggested that a contributing factor to Fairgrounds usage is that the site is in an accessible location. It is centrally located in Canby near downtown and HWY 99. The Fairgrounds also encompasses a distinctive aesthetic. It has big trees, little asphalt and grassy areas. Stakeholders indicated that the facilities are great, and the layout of the complex is conducive to hosting multiple activities and events at the same time.

Despite these positive factors, stakeholders also indicated that there are elements of the Fairgrounds that are missing: a multipurpose building for year-round use; permanent restrooms in the Ely Arena; electrical and acoustics setup in the 4-H Building; a permanent stage with a ramp and dressing room; show rings for an agility course; a facilities ticket system; a designated emergency room with generator; and a site-wide PA system. Stakeholders would like to see improvements to the camping grounds/RV park, to the arena, and to the horse barn and stalls.

As part of this project, the consulting team conducted a survey to understand people's ideas for future use of the Fairgrounds. Survey respondents described their visions for the Fair and Event Center. They also identified ways to achieve their visions. The following are key themes summarized from the survey:

- **Preserve Traditions and Historic Character.** Survey respondents like the historical elements of the Fair and Events Center. They also like the traditional activities and events (e.g. livestock shows, agricultural events and rodeos). Preserving these physical and experiential elements is important to survey respondents. Some even indicated that they did not want to see anything change: they enjoy the existing spaces and events as they are.
- **Modernize Facilities.** More than half of survey respondents explained the importance of “updating” or “modernizing” the existing facilities. Many specifically noted that the horse/livestock barns and arenas needed updating. Many wanted new facilities too and suggested a new multipurpose building and a new barn. Survey respondents believe that modern facilities will attract more events and visitors. Two survey respondents suggested using the Redmond facilities as a model for updates and improvements.
- **Enhance Comfort and Access.** Survey respondents want to see ADA improvements (e.g. wheelchair accessibility and paved walkways). Some made suggestions to maintain cooler temperatures in the buildings, build more bathrooms (with

showers) and install power sources to the campsites. Survey respondents believe these modifications will attract more visitors.

- **Expand Events and Event Capacity.** People enjoy the County Fair, but they identified other events that they wanted to see at the facility too. Suggestions include: beer fests, concerts, antique shows, car shows, dog shows, horse shows, craft and flea markets, yoga, industry (workforce) events and historical events. They believe family-friendly events will help attract more visitors too.
- **Focus on 4-H.** Survey respondents are particularly interested in ensuring that both the 4-H building and the 4-H program are well supported. Many want to create and maintain a place for children and youth.

## Comparable Facilities

This section of the study looks at facilities comparable to the Clackamas County Fairgrounds to gain a better understanding of how the Fairgrounds competes for hosting events within the greater regional market. We consider the greater regional market to be roughly the area within the North Willamette Valley.

Stakeholders interviewed consistently indicated the desire and the need for new and improved facilities. Therefore, a secondary purpose of this section is to gauge whether building new facilities at the Fairgrounds is feasible, given existing competition.

The following provides context into suggested facility needs/improvements. This section is not intended to present a comprehensive list of all facilities in the greater regional market, but to show some facilities, with the purpose of providing context for understanding potential growth of the Fairgrounds.

### Fairgrounds

The following Exhibit addresses fairgrounds in the N. Willamette Valley and nearby counties. With an “x,” the matrix marks spaces / amenities that exist at each Fairground; it marks with a “—,” spaces / amenities that do not exist or could not be determined via web search.

*Exhibit 36. Comparative Description of Amenities and Rentable Spaces at Fairgrounds in the North Willamette Valley and Nearby Counties*

Source: County Fairground web search, retrieved May 2018. Please note: some amenities, not indicated in the table above, may exist but were not easily found in web research.

	Halls / Pavillions	Office / Meeting Space	Storage Space	Kitchen / Concession	Stage / Auditorium	Arena / Stadium / Ring	Livestock Buildings	Courtyard / Plaza or Open Space	RV / Camp Sites
Clackamas County Fairgrounds	X	X	X	X	—	X	X	X	—
Washington County Fair Complex	X	[1]	—	[1]	—	[1]	X	X	—
Hood River County Fairgrounds	X	—	X	X	X	X	X	X	X
Oregon State Fair & Exposition Center	X	X	X	X	X	X	X	X	X
Linn County Fairgrounds	X	X	—	X	X	X	X	X	X
Yamhill County Fairgrounds	X	—	—	X	—	X	—	—	X
Polk County Fairgrounds & Event Center	X	—	—	X	X	X	X	X	—
Benton County Fairgrounds	X	X	X	X	X	X	X	X	X

The next Exhibit address facility rental rates for the Clackamas County Fair and Event Center and other fairgrounds in the region. These facilities are rented for a range of public and private events, meetings and entertainment. Therefore, in many cases, rental rates fluctuate based on the length of the engagement (event), whether the event was public or private, whether the event fell on a week day or weekend, whether the event served alcohol and estimated attendance. Many facilities also charge other fees for security or labor, cleanup or pre-event set-up, extra equipment rentals (e.g. picnic tables, extra chairs, etc.) and other material or services. Many require a deposit.

Exhibit 21 shows rental rates for Clackamas County Fair and Event Center facilities. When reviewing rental rate per square foot, and noting some gaps in the data, we find that Clackamas County Fairgrounds facilities are costlier than others in the region.

- The rental rates for animal-related facilities are generally comparable at Clackamas County Fair and Event Center and other fairgrounds (Exhibit 37).
- Comparing the costs of meeting and event space, such as the Main Pavilion or the 4-H Hall, is more difficult, given the need to assess the quality of space in these types of rental buildings to contextualize rental rates. Generally speaking, Clackamas County Fair and Event Center rental rates for these higher quality facilities are at, or above, rental rates of other fairground facilities (Exhibit 37), and similar to rental rates of other meeting facilities (Exhibit 38).

*Exhibit 37. Facility Rental Rates, Fairgrounds in the N. Willamette Valley / Nearby Counties, 2018*

Facilities by Fairground	Approximate Sq. Ft.	Rental Rate per Day (unless noted)	Rental Cost per Sq. Ft.
<b>Washington County Fair Complex</b>			
Cloverleaf Building	3,200	-	-
for Public Event	" "	\$604 to 763	\$0.19 to \$0.24
for Private Event	" "	\$763	\$0.24
Show Rings Set (1 small, 1 large)	9,600	\$392	\$0.04
Livestock Stalls	-	\$16/stall	-
Parking Lots	-	\$726	-
<b>Hood River County Fairgrounds</b>			
Community Building	5,000	\$350	\$0.07
Summit Building	5,040	\$450	\$0.09
Closed Barn	-	-	\$15.00
Portable Stage	480	\$300	\$0.63

Source: Web Search: County Fairground websites, retrieved May 2018.

Exhibit 37. Continued

Facilities by Fairground	Approximate Sq. Ft.	Rental Rate per Day (unless noted)	Rental Cost per Sq. Ft.
<b>Linn County Fairgrounds Fairgrounds</b>			
Willamette Event Center	48,600	\$2,835	\$0.06
Santiam Building	21,000	\$1,365	\$0.07
Cascade Livestock Pavilion	42,000	\$4,200	\$0.10
Calapooia Arena	48,000	-	-
Horse show (50+ stalls)	" "	\$815	\$0.02
Horse show (<50 stalls)	" "	\$1,630	\$0.03
Ticketed event (with bleachers)	" "	\$2,600	\$0.05
Ticketed event (w/o bleachers)	" "	\$1,630	\$0.03
Warm-up Arena	" "	\$500	\$0.01
Conference Room (4 total)	1,500 (each)	\$160+	\$0.11+
Stalls (horse)	-	\$40 (2 day min.)	-
<b>Yamhill County Fairgrounds</b>			
LL Pavilion	7,500	-	-
Full-Day, Non-alcohol Event	" "	\$400	\$0.05
Full-Day, Alcohol Event	" "	\$600	\$0.08
Half-Day, Non-alcohol Event	" "	\$250	\$0.03
Half-Day, Alcohol Event	" "	\$350	\$0.05
Hourly	" "	\$35/hour	-
<b>Polk County Fairgrounds &amp; Event Center</b>			
Main Building	14,564	-	-
Non-alcohol Event, with Kitchen	" "	\$1,150	\$0.08
Non-alcohol Event, without Kitchen	" "	\$900	\$0.06
Alcohol Event, with Kitchen	" "	\$1,450	\$0.10
Alcohol Event, without Kitchen	" "	\$1,200	\$0.08
Building B	4,300	-	-
Non-alcohol Event	" "	\$350	\$0.08
Alcohol Event	" "	\$700	\$0.16
Building C	6,400	-	-
Non-alcohol Event	" "	\$325	\$0.05
Alcohol Event	" "	\$550	\$0.09
Floral Area	-	-	-
Non-alcohol Event	-	\$900	-
Alcohol Event	-	\$1,200	-
Practice Arena	19,780	-	-
Non-alcohol Event	" "	\$420	\$0.02
Alcohol Event	" "	\$660	\$0.03
Riding Arena	29,900	-	-
Non-alcohol Event	" "	\$420	\$0.01
Alcohol Event	" "	\$660	\$0.02
Storage (one-time fee)	-	-	\$13.00

Exhibit 37. Continued

Facilities by Fairground	Approximate Sq. Ft.	Rental Rate per Day (unless noted)	Rental Cost per Sq. Ft.
<b>Benton County Fairgrounds</b>			
Auditorium	6,000	-	-
Monday-Thursday	" "	\$550	\$0.09
Friday-Sunday	" "	\$890	\$0.15
Auditorium Conference Room	1,400	\$190	\$0.14
Gerber Hall	4,200	-	-
Monday-Thursday	" "	\$420	\$0.10
Friday-Sunday	" "	\$625	\$0.15
Benton Arena	33,000	-	-
Monday-Thursday	" "	\$500	\$0.02
Friday-Sunday	" "	\$750	\$0.02
Carriage House	1,392	-	-
Floral Courtyard	9,640	-	-
Monday-Thursday	" "	\$285	\$0.03
Friday-Sunday	" "	\$480	\$0.05
Outdoor Arena	24,000	-	-
Monday-Thursday	" "	\$350	\$0.01
Friday-Sunday	" "	\$610	\$0.03

## Other Facilities

Within the county, there are other comparable facilities to the Clackamas County Fair and Event Center. This section documents these facilities, but it is not meant to be comprehensive.

### Event Centers and Meeting Spaces

This section considers comparable venues, from a space and capacity perspective, that can be reserved and rented for public and private events. These include events centers, entertainment venues and similar grounds. Research shows a vast and wide variety of classier, high-quality venues (e.g. spaces for weddings, banquets and corporate events) across the region. We document some of these venue types for Clackamas County along with other centers that provide space for rent. As data was available, we provided capacity (maximum people), square footage and rental rates. This section offers insight into potential market competition.

*Exhibit 38. Comparative Facilities in Clackamas County, with Attributes*

Source: Web search, retrieved May 2018.

Venue	Event Capacity (People)	Sq. Ft.	Rental Rate	Cost per Sq. Ft.
<b>McLean House</b>				
October-April (w/out tent)	60	-	\$140 to \$880	-
May-September (w/ Tent)	100	-	\$140 to \$1,650	-
<b>Abernethy Center</b>				
Abigail's Garden	300	14 acres	\$1,500 to \$4,500	-
Abernethy Chapel	50	no record	\$1,000 to \$2,000	-
Veiled Garden & Ballroom	300	no record	\$2,000 to \$5,000	-
Abernethy Ballroom & Chapel	300	no record	\$1,500 to \$2,500	-
<b>The Tumwater Ballroom</b>				
Tumwater Room	250	7,000	\$1,600 to \$3,000	-
<b>The Foundry at Oswego Pointe</b>				
The Promenade	-	1,500	-	-
The Great Hall	200-300	3,200	-	-
The Riverside Deck	200	1,600	-	-
The Garden Patio	-	1,400	-	-
The Founder's Room	40	-	-	-
<b>Ainsworth House &amp; Gardens</b>				
Entire Venue (weddings)	125	4000+	\$2,250+	-
Garden Room	35	-	\$100+ (per hour)	-
Conference Complex	-	-	-	-
Whole Complex	-	-	-	-
<b>Clackamas Banquet &amp; Catering Center</b>				
Meeting Rooms (3)	300	820 each	-	-
<b>Clackamas Community Club</b>				
Saturdays	100-150	~1500	\$475	\$0.32
Fridays and Sundays	" "	" "	\$350	\$0.23
<b>Milwaukie Community Center</b>				
Ballroom	-	~3500	-	-
Sunday-Friday	-	" "	\$350	\$0.10
Saturday	-	" "	\$450	\$0.13
Basement	90	1,860	\$250	\$0.13

## Spaces for Equestrian Activities

Clackamas County has seven trail locations for community members and tourists to partake in equestrian riding.

*Exhibit 39. Equestrian Trailheads in Clackamas County*

Source: Clackamas County Active Transportation Plan Appendices A through F. (2013). Retrieved from: [http://www.oregon.gov/LCD/TGM/TGMProducts/1E-12\\_2.pdf](http://www.oregon.gov/LCD/TGM/TGMProducts/1E-12_2.pdf)

Trailhead	Approx. Distance from Clackamas Fairgrounds	Description
Unger Road Trailhead	17 miles	On public (BLM, County) and private land
McIver Park Trailhead	20 miles	Day-use; 8 miles of trails; overlooks Clackamas River
Viola Trailhead	20 miles	On private land; extensive network
Molalla River Trails	20 miles	On public land; shared-use trail system
Elwood Road Trailhead	21 miles	On private land
Howards Mill West	35 miles	-
Table Rock Wilderness	38 miles	Shared-use trail (horse and hiking); 16-mile system
Riley Horse Camp	51 miles	Trail riding from McNeil Campground in Mt. Hood National Forest

In the North Willamette Valley, there are also dozens of centers and facilities that offer equestrian stalls, care and riding trails for a fee, or through membership.

## Conclusions and Implications for Future Events and Facilities Needs

The purpose of this analysis was to present information that informs a preliminary market assessment for potential growth of the Clackamas County Fair and Event Center. The information in this memorandum provides context about potential for future growth, both in events and in growth of the Fairgrounds facilities. The following are key findings of the analysis.

- **Growth of population will drive demand for new events at the Fairgrounds.**

The population of Clackamas County is growing at about the same rate as the rest of the Portland Region, with Clackamas County adding nearly 75,000 new residents between 2000 and 2017. New residents are generally concentrated in the more urban areas of the county, such as Happy Valley, Wilsonville and Oregon City. Clackamas County is forecast to grow by more than 144,000 people between 2015 and 2040.

- Changes in demographic characteristics of the people living in Clackamas County will affect demand for Fairground events in the future. Of particular interest are youth and seniors, in which both groups are more likely to participate in events held at the Fairgrounds. The percentage of County residents under 20 years old is expected to hold steady between 2020 and 2040 and the percentage of people over 60 years old is expected to increase slightly over that same period.
- Increases in ethnic diversity may provide opportunities for the Clackamas County Fair and Event Center to meet the growing and changing needs of residents in the County and the Portland Region. Since 2000 Clackamas County's population has become more ethnically diverse with the growth of Latino and Hispanic population: a trend consistent with the rest of the Portland Region and state.
- These changes in demographics provide opportunities for the Fairgrounds to plan for events that appeal to these different demographic groups. For instance, Mexican rodeos (called charreada) are growing in popularity. Hosting these events may provide an opportunity for growth of the number and types of events at the Fairgrounds.

- **Growth in tourism may provide opportunities for the Fairgrounds.** Some of the events at the Fairgrounds, such as the Fair and Rodeo or horse and 4-H shows, appeal to both visitors and residents of Clackamas County. Direct spending from tourists in Clackamas County has increased by 82% between 2000 and 2017. The tax

receipts from lodging taxes grew over the last decade, increasing by 72% between 2007 and 2017.

- **Clackamas County's fairground is deeply connected to the county's agricultural history.** The Fairgrounds facilities are ready to provide opportunities for animal and tourism related events, especially events targeted towards youth such as 4-H events or equestrian events. There may be additional opportunities from agricultural tourism—a growing type of tourism—that appeals both to residents of and visitors to an area. The Fairground's connection to agriculture in Clackamas County may provide an opportunity for featuring new agriculture tourism related events at the Fairgrounds.
- **Clackamas County Fairgrounds has more than 300 events per year.** Events at the fairground are held throughout the year with a concentration of events in the spring and the annual Clackamas County Fair and Rodeo in the summer. The events have attracted more than 85,000 attendees per year over the last three years.
  - The Fairgrounds has more events on weekdays than weekends, such as meetings and club events. The types of events that occur on weekend days are typically private parties, horse shows and larger events (e.g. fundraisers, auctions, ceremonies and other public festivities).
  - Equestrian events are a prominent type of event held at the Fairgrounds, accounting for about 35% of all event types.
  - Events occur in each of the Fairgrounds' facilities, with the Ely Arena and Horning Hall most frequently used.
  - About 70% of events pay rental fees. The types of events least likely to pay rental fees are meetings, public benefit events (e.g. blood drives), and Fair-Related Events.
  - The Rodeo Arena is used less than the Ely Arena. Of the pavilions/halls, 4-H Hall is used the least, followed by the Main Pavilion, Clackamas Hall and Horning Hall.
- **Clackamas County Fairgrounds has a substantial amount of competition for events from other nearby Fairgrounds and event / meeting facilities.** Each of the adjacent counties have a fairground, with the exception of Multnomah County, which has other facilities for events and animal related events. There are numerous event centers and meeting spaces in and around Clackamas County. In addition, there are many equestrian facilities in Clackamas County. These facilities all create competition for events that might be held at the Clackamas County Fair and Event Center.

- **The rental rates at Clackamas County Fairgrounds facilities are at or above rental rates for other comparable facilities.** The rental rates of Clackamas County Fair and Event Center facilities are comparable to other fairgrounds for animal related facilities. Comparing the costs of meeting and event space, such as the Main Pavilion or the 4-H Hall, is more difficult given the need to assess the quality of space in these types of rental buildings to contextualize rental rates. Generally speaking, Clackamas County Fairgrounds' rental rates for these higher quality facilities are at or above rental rates of other fairground facilities and similar to rental rates of other meeting facilities.

The implications for the Master Planning process of this preliminary market assessment for growth of events and usage of the Fairground facilities are as follows:

- **Plan for events that appeal to people living in and around Clackamas County.** The Master Plan should begin with an evaluation of the types of new events that the facility improvements and new facilities will support. The survey of stakeholders conducted for this project suggests that people value the traditions and the historic character of the Fairgrounds, and want to see a continuation of related events, such as livestock, agricultural and rodeo events. Survey respondents also indicated an interest in other types of events, such as beer fests, concerts, antique shows, car shows, dog shows, horse shows, craft and flea markets, yoga, industry (workforce) events and historical events. Survey respondents also indicated a strong interest in continued focus on youth events.

The Clackamas County Fair and Event Center should also consider events that are attractive to people visiting the region. In some cases, attracting tourists to fairground events may be more a matter of marketing existing activities to tourists than planning special events designed to attract tourists. The Fairgrounds should work with regional stakeholders to identify events that would be attractive to tourists, such as meetings or events specifically for people from outside of the region.

- **Consider opportunities to make better use of existing facilities.** Some of the Fairgrounds facilities appear to be underutilized, such as the 4-H Hall or Horning Hall. Staff should assess the reasons that these facilities are used less often than they could be. For instance, the 4-H Hall is unavailable for rentals on some weekends because of agreements with 4-H. Is it possible to modify the agreement so that 4-H has access to other Fairground facilities when the 4-H Hall can be rented on the weekend?

Other buildings need upgrades to make them more attractive for events, such as renovation of restrooms and possible addition of an elevator to the Main Pavilion.

The Rodeo Arena is in an area prone to flooding so it is usable in the dry season but only partly available in the wet season.

- **Prioritize building upgrades and new facilities based on a full understanding of the benefits and costs of the upgrades and new facilities.** This prioritization must be based on a balanced understanding of: potential demand for usage of the facilities, considerations of potential revenues from rental of the facilities, and costs of the upgrades or building new facilities.
  - The types of events that stakeholders generally indicated they wanted are consistent with the existing facilities at the Fairgrounds. Stakeholders recommend performing maintenance or upgrades to all of the existing facilities at the Fairgrounds. In addition, stakeholders identified a desire for new facilities, including: replacement of the Livestock Barn, significant improvements to the Rodeo Arena, significant improvements to the Ely Arena, a new storage building, expansion of and improvement to the RV and campgrounds, and development of a 40,000 to 50,000 square foot multipurpose building.
  - The facilities at the Fairgrounds generate different amounts of revenue, depending on the amenities and characteristics of the buildings and the organization renting the space. For example, rental of the Rabbit and Poultry Barn is substantially less expensive than rental of the 4-H Exhibit Hall. In prioritizing facility upgrades, one criteria may be the amount of potential revenue generated by the facility, giving higher priority to improvements that will yield more revenues.
  - Another consideration in prioritizing upgrades is the capital costs of different upgrades. Incremental improvements to existing buildings (e.g., minor renovations of restrooms) are likely to be less expensive than building new buildings, unless the improvement was a full renovation of the building.
  - As part of the full Master Plan project, the Fair Board should evaluate the financial feasibility of upgrades and building new facilities, based on the consideration of potential changes in revenues and the costs of improvements.
- **The Master Plan should consider the public benefit of improvements and additions to Fairground facilities.** In FY 2016-2017, about 30% of use of the Fairgrounds facilities are unpaid, by groups such as Canby Kiwanis, 4-H, Red Cross, Sheriff Posse and Canby OHSET. Feedback from stakeholders indicated a high degree of support for continuation of use of the Fairgrounds facilities by these types of groups, with little or no rental payment. The Fairgrounds are financially self-

supported, with revenues from rentals of the facilities covering the operating and capital costs of the Fairgrounds.

It is highly possible that the costs of improvements to the Fairground facilities, especially building new facilities, will exceed the likely revenues of renting the facilities. If this is the case, it is essential to understand the public benefits of the Fairground facilities. It is important to understand the amount and type of support that decisionmakers, such as the Fair Board and Board of Commissioners, have for making the improvements and identifying alternative sources of revenues to pay for the improvements.

- **The Master Plan will need to consider ways of increasing revenues and funding for the Fairgrounds to support the improvements to the Fairgrounds facilities.** The Fairgrounds could increase usage of underutilized buildings (as discussed above), by increasing the number of rentals, especially in the facilities that have higher rental rates. This may require working with groups that use the facilities for low or no rents to accommodate their demands for the facilities and to increase rental payments of the higher cost facilities.

Rental costs for animal-related facilities is comparable to other regional facilities. Significantly increasing rents for these facilities may be difficult because the people renting these facilities are often groups that pay little or no rent. The exception may be for equestrian related activities, such as horseback riding or rodeos. The Master Plan should evaluate whether increasing the amenities at the Ely Arena would lead to an increased willingness to pay for use of the facilities. Improvements to the Rodeo Arena that allow more frequent use may enable it to be rentable more frequently. The Master Plan should evaluate the likelihood of more frequent usage of the Rodeo Arena, the resulting revenues, and the costs of making the improvements.

The Fairgrounds' options for increasing rental rates for non-animal meeting and event space may be limited. The rental rates for these spaces at the Fairgrounds are at or above the costs of comparable fairgrounds and other meeting and event spaces. The Master Plan might include more evaluation of these options and identify potential increases in rental rates with improvements to the facilities.

- **The Master Plan should include a full financial feasibility assessment for proposed improvements to the Fairgrounds.** This feasibility assessment should include an estimate of potential increases in revenue in comparison to the capital costs of facility upgrades. The feasibility analysis should consider potential changes in operational costs and maintenance costs, as well as capital costs. For example, adding restrooms in a building might result a marginal increase in maintenance

costs (e.g., cleaning and long-term maintenance), but would not result in an increase in administrative costs. However, building a new multipurpose building could increase maintenance costs, administrative costs (such as booking the building) and marketing costs.

Assessing the financial feasibility for improvements and new facilities will be an iterative process. Iterations will be adjustments to the proposals for new facilities and adjustments to the potential usage of the facilities (based on proposed facilities). Ideally, the Master Plan will help Fairgrounds staff understand the types of upgrades that can be funded by new rental revenues.

In the absence of specific ideas about facility upgrades, it is difficult to estimate future usage of the facilities and resulting revenues. For example, if facility upgrades caused rental revenues to increase by 5% from FY 2016-2017, the Fairgrounds would have \$15,000 in revenue to pay for capital and operational costs. If rental revenues increased by 10%, the Fairgrounds would have \$30,000 revenue to pay for capital and operational costs. In comparison, the cost of debt service on a \$1,000,000 bond is about \$75,000 per year.

A modest increase in revenues would not pay for the capital costs of substantial renovations or building of new facilities. The Master Plan can also help to fill the funding gap that may need to be met by other funding sources.

## V. Next Steps

Our approach to the Master Plan includes three phases: Discovery, Analysis and Planning. In Phase I, we conducted stakeholder outreach, reviewed existing plans and prepared a preliminary market assessment to gain a better understanding of the Clackamas Fair & Event Center and the opportunities and challenges it faces in the future.

Phase II typically begins with a site assessment that documents current conditions of the site and facilities and identifies opportunities for improvements. In the case of the Clackamas County Fair and Event Center, this work has been done to a large degree through the *2014 Vision and Property Assessment Phase I Plan* and the *2014 Building Reports Summary*. While we will update the information provided in these reports as needed, our main tasks in this phase are outlined below.

In Phase III, we will prepare a draft and final Master Plan with three main components: A Site and Facilities Plan, a Business Plan and a Marketing Plan.

### Proposed Scope of Work

#### **Task 1. Project Management**

Throughout the process, the consultant team and County project managers hold bi-weekly project management phone calls to track progress on key tasks and deadlines, identify unanticipated issues and develop alternative approaches as needed. To ensure accountability and conformance with the project budget, we will prepare monthly progress reports and invoices that describe the activities undertaken, estimate the percent completion of each task and track expenditures and hours.

*Deliverables: Bi-weekly project management calls; monthly invoices and progress reports*

#### **Task 2. Stakeholder Outreach**

##### Task 2.1 Technical Advisory Committee (3)

Convene a Technical Advisory Committee (TAC) to provide a broad perspective of existing conditions and needs at the Fair & Event Center. The TAC will meet three times during Phases II to help guide master plan development and make recommendations to the Fair Board. Members may include, but are not limited to selected representatives from:

- Clackamas County Fair and Event Center Board of Directors (2)
- City of Canby Economic Development
- Canby Area Chamber of Commerce
- Clackamas County Tourism
- Clackamas County Business and Community Services
- Canby Rodeo Association

- OSU Extension/4-H
- Fair Improvement Foundation

### Task 2.2 Public Meetings and Surveys (2)

We will work with the TAC and Fair Board to host two public surveys and one public meeting for stakeholders and community members to review and comment on the draft Master Plan. The first survey will take place in Task 3 and focus on identifying priority improvements. The public meeting, in Task 4, will provide stakeholders an opportunity to review the draft Master Plan. The public meeting will have a corresponding online open house or survey to allow people who cannot attend meetings in person to comment.

### Task 2.3 Fair Board Meetings (3)

We will meet with the Fair Board three times throughout the course of the project. The first meeting will be to review the TAC's priority improvement recommendations. The second meeting will be a joint meeting with the Board of County Commissioners to discuss the Plan. The Fair Board will meet a final time to adopt the Final Master Plan once final revisions have been made.

## **Task 3. Facility Improvement Priorities**

We will begin by compiling a list of potential facility improvements identified in Phase I. We will work with the TAC to establish criteria and metrics that will be used to evaluate potential improvement projects. Criteria may include safety, cost of maintenance and operations, market and revenue expansion potential and "old fashioned fair" heritage. The consultant team will prepare the quantitative (e.g. cost estimates, anticipated return on investment and projected staffing needs) and qualitative (e.g. facility history and current uses) data needed to evaluate the projects. The TAC will use this information and stakeholder input to discuss and recommend priority improvements to the Fair Board. The Fair Board will meet to review and refine the priorities as needed.

## **Task 4. Master Plan**

### 4.1 Draft Master Plan

We will prepare a draft Master Plan consisting of three main components:

**Site Plan.** A land use, facility and circulation plan that includes illustrations and narrative descriptions of overall site design and a funding and phasing strategy to guide Fairgrounds decisions over time. Diagrams will show existing buildings to remain and proposed building additions and new buildings. The Site Plan will consider building systems, utilities and structural economy when preparing the concept. Site access and traffic flow, queuing, parking and loading areas, and pedestrian circulation and public outdoor spaces will be

illustrated. Preliminary cost estimates in rough order of magnitude for proposed improvements will be developed.

**Business Plan.** A comprehensive business plan for the planned facilities that is both feasible and sustainable. We will identify and analyze possible funding mechanisms including federal, state, transient lodging tax, and local opportunities and potential partnerships, identifying the advantages and disadvantages of each. The business plan will address facility improvements, including the costs of facility improvements, and options for paying for the improvements. The business plan will consider operations and management issues, especially those related to changes in use of Fairground facilities. Where it makes sense, it will provide recommendations for increasing the usage of existing facilities, focusing on opportunities for increasing revenues from rentals.

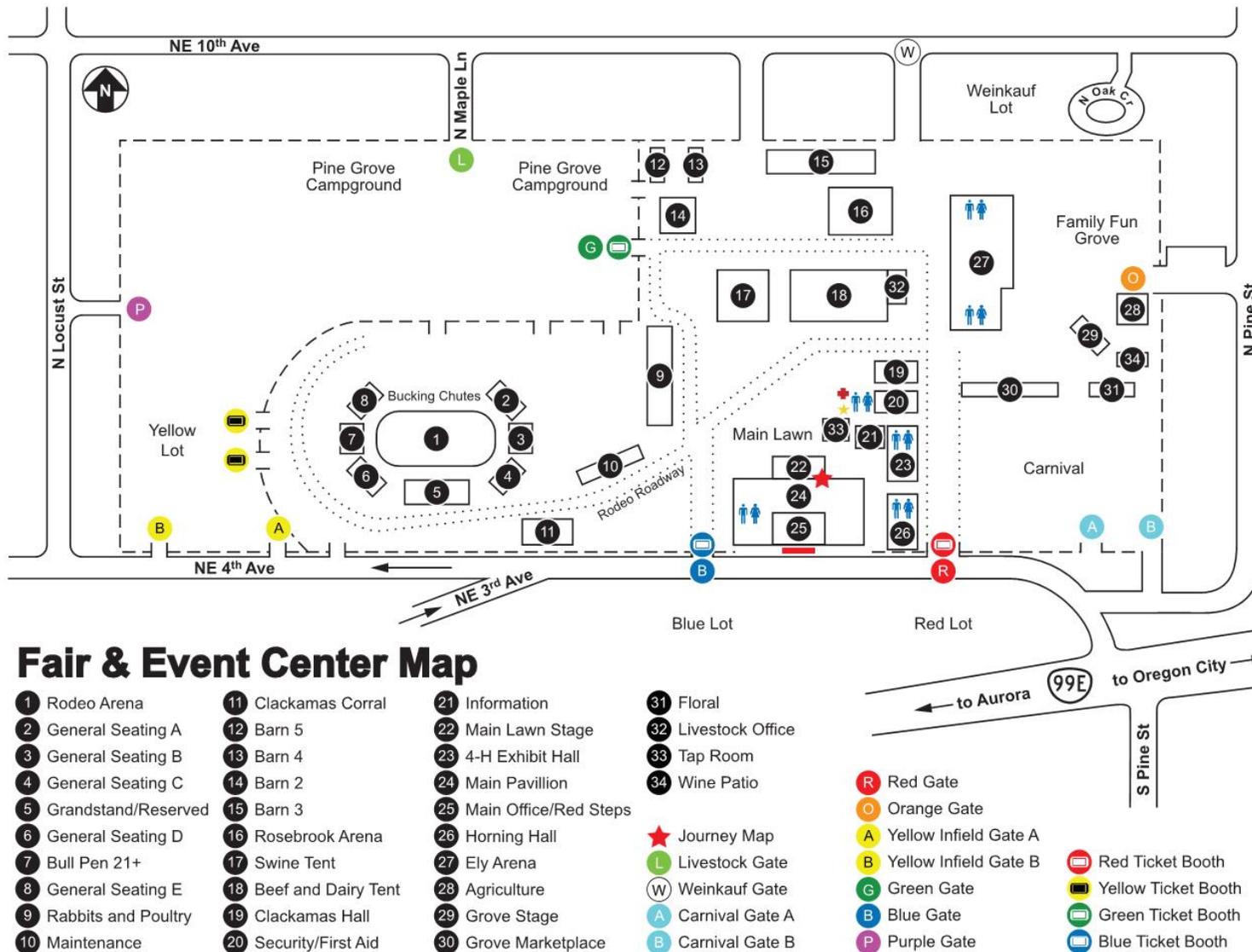
**Marketing Plan.** We will work with staff from Clackamas County Tourism & Cultural Affairs to prepare a marketing strategy focused on increasing use and revenues of the Fair and Event Center facilities. The marketing plan will identify target audiences (age, income, location, etc.) and desired events, assess competing venues and the Fairgrounds differentiators, inventory existing advertising assets (website, social media, print), identify costs (advertising, staffing) and develop strategies, actions and timelines. A focus will be events that have their roots in Clackamas County. The TAC will help ensure that the plan is aligned with tourism efforts from the City of Canby and Clackamas County.

#### Task 4.2 Final Master Plan

We will present the draft Master Plan to the TAC prior to public meeting #2. Following the public meeting, we will present the revised Master Plan to a joint meeting of the Fair Board and Board of County Commissioners for comments before finalizing the Plan. The final Master Plan will be presented for adoption at a Fair Board meeting.

Estimated cost of the Master Plan Phase II is \$75,000

# Appendix A. Fair and Event Center Map



# Appendix B. Compilation of Stakeholder Interviews

March-August 2018

The consultant team conducted focus groups with select members of the Fair Board and other key stakeholders during the day of the project kick-off meeting in March 2018. These focus groups were designed to identify key issues, opportunities and areas of consensus at the project's outset. For those unable to be present at the focus groups, the team followed up via phone for additional interviews. As listed below, stakeholders participating in focus groups or phone interviews included Fairground partners, vendors and representatives of the City and County chambers of commerce, tourism and economic development staff, planning agencies, civic groups and others, as requested by the Board.

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## 1. What is your affiliation or experience with the Clackamas County Fair and Event Center?

The following stakeholders participated in focus groups or interviews for the Clackamas County Fairgrounds Master Plan. Their responses are aggregated by interview question.

Name		Affiliation	Organization
Mary	Anderson	Fair Superintendent	Fair Superintendent
Trish	Apple	4-H Member	OSU Extension
Jim	Bernard	Clackamas County	Commissioner (Chair)
Mike	Bondi	4-H Member	OSU Extension
Brandy	Chastain	Facility User	Oregon Flock and Fiber Festival
Wanda	Colin	Fair & Rodeo	Business Owner in Canby
Matilda	Deas	Long Range Planner	City of Canby
Dick	Eagle	Rodeo Member	Canby Rodeo Association President
Tully	Fernando	Ely Arena Gaming Events	Clackamas County Gaming Assoc.
Ruth	Gallaway	Fair and Event Center	CCFEC
Todd	Gary	Rodeo Member/Division Chief	Canby Fire District #62
Lyle	Hendrickson	Rodeo Member	Rodeo Committee Member
Ken	Humberston	Clackamas County	Commissioner
Lauren	Humphreys	Fair & Rodeo	Board Member
Raeline	Kammeyer	Livestock	Fair Board Member
Rick	Kauffman	Committee Member	Rodeo
Don	Krupp	County Employee	County Administrator
Ted	Kunze	Fair & Rodeo	Fair Board President

Kyle	Lang	Canby Area Chamber of Commerce	Director
Elan	Langridge	Floral	Fair Volunteer
Gary	Linton	Fair & Rodeo	Fair Board Vice President
Dan	Mickelson	Committee Member (?)	Rodeo
Lisa	Miley-Beck	Fair	Superintendent of Sewing, Photography, Hobby Hall
Steve	Nielsen	Clackamas Kennel Club	Improvement Foundation
Ron	Oberg	Fair & Rodeo	Past Fair Board Member
Clay	Rhodes	Committee Member	Rodeo
Sandy	Ricksger	Volunteer	Fair
Rick	Robinson	City of Canby	City Manager
Irwin	Rodgers	Spring Plant Sale	CC Master Gardeners
Dan	Sanberg	Livestock, 4-H, Hearth	Fair Board Member
Julie	Smith	Photographer	CCFEC
Jamie	Stickel	City of Canby	Main Street Manager
Jan	Williams	4-H Member	OSU Extension
Laura	Zentner	County Employee	Director, Business & Community Services

## 2. What works well at the Fairgrounds today in terms of...

### a. The site?

- The site is central, and close to downtown and Hwy 99.
- There is a strong historical element, as the Fairgrounds have been here since 1909.
- The site is shaded and grassy, with big trees and little asphalt. Although it's somewhat of an inconvenience for construction, keeping trees and grassy areas intact is what makes the site very unique.
- The location is good, family-friendly and walkable.
- Love the trees.
- Great location. Part of the experience of a county fair is converging on one place, so it's natural for traffic and parking issues to be part of that experience. You just need to plan for it.
- Traditional charm.
- Great location with parking.
- Excellent location.
- Overall size and space, parking and grassy areas.
- Good job with sources available.

**b. The facilities?**

- The new main lawn complex with meeting rooms and bathrooms is great.
- The layout is conducive to having multiple activities and events going on at the same time. During the Fair areas are distinguishable and naturally separated for different uses.
- The spring plant sale uses several buildings and all of the grounds, making good use of the facilities.
- Dog show is very large and uses most of the grounds.
- Front buildings have some historic value.
- Rodeo is designed so spectators can be close to the action.
- New tower and updated pens.
- Facilities are good for animal activities, but not as good for non-animal functions. Acoustics are bad, maintenance is poor in some areas.
- Older buildings in poor condition (code compliance, fire suppression) limit events.
- Portable outdoor stage that could be dragged in and out of rodeo arena.
- Main Pavilion is a good venue during the fair in terms of booths and circulation.
- Carnival location is great.
- Bathrooms are good.
- 4-H building/kitchen.
- Facilities are clean and well-maintained.
- Rodeo grounds.
- 4-H building has beautiful hardwood floors.
- Ely barn is always in use.
- Outside spaces are beautiful.

**c. Activities and events?**

- Operate an outstanding and well-regarded county fair.
- The rodeo is a well-run and popular event.
- Rent has increased for the Main pavilion from \$4,500 to 7,000. That is significant.
- Organization of programming is efficient.
- Fair is not overly commercial.
- The Fair has a family-friendly vibe.
- The grounds can host multiple events in different buildings across the grounds.
- 4-H events.
- Events have been turned away in the past due to inadequate facilities.
- Events in Horning Hall.
- Well-run events. Staff is accessible.
- Rodeo is great and is a huge draw.
- Garden show.
- Dog show.

### **3. What improvements would you like to see in the future? What is your vision for the Fairgrounds (site and facilities)?**

- The rodeo arena needs more seating and the roping area at the end of the arena needs to be opened up and reconfigured. Drainage could be improved. The VIP area needs more box seating (skyboxes) above the roping chutes. The whole arena would benefit from more bleachers, so it could accommodate about ~6,000 people. It could even be covered for year-round use and use a roll-in floor like the ones used at the Calgary Stampede. The rodeo also needs a restroom.
- The Fairgrounds could be a hub of equine activity along I-5 to draw people from Canada to Mexico. It would need to be covered/fully enclosed or have indoor and outdoor capabilities. The facility also could be used for motocross, dog shows, etc.
- Need more seating. Current seating is not up to code.
- The Main Pavilion would benefit from updated restrooms, more water fountains, and an updated acoustic/sound system.
- The floral area needs to be replaced or improved to make it more conducive for a wedding venue or outdoor reception area.
- The Fairgrounds needs a multipurpose building or buildings that can be used year-round. Not just for livestock, but car shows, etc. Something along the lines of 40,000-50,000 square feet, with restrooms and meeting rooms and a large arena that is well ventilated.
- A multi-use livestock facility is needed. Not a barn, but an exhibition hall.
- A multi-use building with classrooms is needed to attract conventions and business groups.
- A large multi-use building for stock sales. Currently, there isn't enough seating.
- The Fairgrounds need improved camping grounds/RV park, since Canby has no motels (though there is a new hotel site between the Cinema parking that should have 60-80 rooms). Improved camping would be more conducive to hosting people for multi-day events. This should include improving power supply and adding a restroom and shower facility. If the limited RV site stays as is, it needs improved wiring and power supply.
- Repair or replace the horse barn and stalls. This has turned off most of the equestrian activities. This would mean building another storage facility in order to move items being currently stored in the horse barn.
- Barns need to be replaced and updated if the Fairgrounds wants to board horses.
- The Dog Show is a success and could potentially add another 600 dogs a day if they had an agility course (currently can accommodate 1800 to 2200 dogs per day). This could be two rings, approximately 120'x100' (grass or dirt). They would like to use the arena, but often it's too wet in June. They could make use of another building the size of Ely Arena with a dirt floor.
- 4-H building needs updated electrical and acoustics (circuit breakers trip frequently), as well as adding the back porch that was removed, filling in the holes in the building floor, and updating the kitchen. Consider expanding the building, as some of the

biggest 4-H clubs are not necessarily animal-related and are too big for the current building, so they use other buildings.

- 4-H building works fine during Fair.
- Ely Arena needs permanent restrooms, new siding and gutters, and possible a lean-to or covered staging area to tie up horses. Currently the Arena gets muddy inside along one long wall during the wet months.
- Ely arena has existing issues which could be a problem in case of emergency. Fire sprinklers are needed.
- The Fairgrounds needs a permanent stage with a ramp that could be used for weddings, bands, etc. This would need to include a dressing room and green room. Another option is a portable stage, similar to the ones used at the Calgary Stampede. The question would be where to store it. Also could use a gazebo for weddings.
- The Kennel Club could use more dry spaces to expand the dog show.
- Fairgrounds facilities are not well taken care of and not repaired or replaced. The Fairgrounds do not generate enough revenue to maintain facilities. Need to include percentage of fees to go to maintenance.
- Building upkeep is an issue – carpet, bathrooms, electrical, Wi-Fi. There needs to be a facilities ticket system to report, prioritize, assign and follow-up on maintenance issues.
- The property should have its own well in order to reduce sewer/water charges.
- There should be a designated emergency shelter, with an emergency generator.
- The whole Fairgrounds should have a site-wide PA system.
- Parking and traffic flow are problems, especially for rodeo contestants. Better signage would help.
- Electrical and plumbing infrastructure should be the main focus of improvements.
- Pioneer Village needs a new façade and plantings around the fence.
- Fix the northwest corner of the arena.
- The small animal barn is inadequate.
- Floral area needs improvements.
- New multipurpose facility.
- Rodeo grounds are barely adequate.
- New, large, multi-purpose buildings. One at 10,000sf and maybe another at 5,000sf for concerts, car shows, etc. Can show animals during the fair.
- More grand stands and maybe covered someday.
- Upgrade the old arena.
- Multi-use space for weddings, retirements.
- Meeting rooms and event spaces are not high quality. Older buildings with water issues. Need to upgrade and maybe replace.
- Consider developing a larger, modular conference center that can seat 1,000 to 2,000 people and be divided into smaller spaces as needed.
- Multi-purpose building (long term).
- Focus on small changes to increase revenues.

- Cover arena to increase use year-round.
- Back forest area as wedding venue. Erect a barn to support that use.

**4. What types of activities and events should the Fairgrounds try to attract during non-Fair times? What types of facilities and amenities are needed to do so?**

- Microbrewery festivals.
- Concerts hosted in a new main building (a new music venue).
- Home and Remodel shows, trade shows, boat shows, car clubs.
- Conventions and conferences hosted in a new main building (would need meeting space for 250 people, or a ~4000 sf room).
- Speakers, lectures.
- Horse events and roping events (would need stalls for 100 horses, similar to the Linn County facility). Would be good site for the twice-a-year tack sale.
- Birthday parties, weddings, summer camps, church camps (to make all-night use).
- The staff need more canvassing and event advertising capacity.
- Need to stick with country themed, rural themed events and activities. That should be our focus. Can't compete with big fancy buildings w/ urban flair.
- RV hookups would be needed for year-round use to be able to accommodate other types of activities and events. New wiring for outlets is needed along with water, septic and bathrooms/locker rooms/shower.
- Make the Fairgrounds a hub for agricultural activity, not RVs. Challenge of RV Park is not being on I-5.
- Build a sports complex like the one they have at Tri-Cities. A building that can accommodate 3x3 basketball and wrestling tournaments.
- Food-related events. Embrace the food culture and where food comes from.
- Physical condition of facilities and lack of modern technology is a barrier to using them at their full capacity.
- Best for local events, shows, fairs. A place where the community can share their creations.
- Training site for businesses, government and nonprofit organizations.
- Entertainment/music venue.
- Agriculture Business – John Deere, Clackamas Agricultural Loop, nursery industry, conferences.
- Look at zoning and what restrictions are in place due to current zone.
- Need to be thinking about how to market and use the Fairgrounds year-round rather than just during the fair. Need better promotion to lease buildings year-round.
- Look at Clark County Amphitheater as model of what Clackamas Fairgrounds can be. No music venues nearby.
- X-games and other activities to attract teens.
- Concerts and car shows.
- Children's movies.
- Car shows, concerts, bigger dog show, gun shows, livestock shows, weddings. Theater company.

- Don't understand why there aren't musical events there. Be open to new ideas and events. Wild Hair Fest is a good example.
- Start with smaller, local activities but ramp up to a destination for large events, concerts, entertainment.
- Canby Farmers Market.
- Outdoor concerts (like Franklin Graham), similar to Edgefield or the Zoo.
- Weddings.
- Music, comedy, outdoor festivals (e.g., Wren Fair, Wild Wild West, Hair Fest).

**5. What opportunities or trends should we be aware of that may impact visitors or events in the future?**

- Burgeoning interest in microbreweries.
- Rodeo events have become more popular across a larger demographic.
- All events should be kid-oriented.
- The Fairgrounds should monitor millennials and next generation and what they are interested in. The Fair needs to remain traditional (people are still wanting to keep their fingers on the pulse of the rural culture) but should make sure the next generation will want what they are providing.
- A percentage of the rental fees and costs should go to the repair and replacement of existing buildings. Add an additional percentage to every fee in order to take care of assets. This will attract more people in the long run.
- Market to attract company picnics, summer camps, church camps, trade shows, quincineras, graduation parties, baby showers, birthday parties.
- Red Cross training events. Need generators to serve as an emergency shelter/center.
- Monitor interests of millennials and next generation to see what types of events will attract people in the future.
- Opportunity to partner with County departments to assist in areas where Fair staff does not have expertise.
- Preserve traditional fair and activities while looking to new trends. Travel to other fairs to see what others are doing to prepare for the future.
- Food and beverage industry – farmers market, bazars, agritourism, wine, beer festivals.
- Music festivals with camping.
- People spend money on experiences. Wine/brew festival is an experience – eat, food, music, drinks. Rodeo with music afterwards.
- City invested \$3 million in downtown and staff are focused on tourism and ways to improve success of downtown businesses.
- Western weddings, outdoor weddings.
- Sewage hookups and dump for RVs.

## 6. Is there anything else you would like to share?

- There needs to be a clear vision for the Fairgrounds, as not everything will be able to get done. A vision will help identify priorities and guide investment.
- Should be a place for youth and education.
- The Fairgrounds has personality and is a historic gem. The vision should build on that, instead of making drastic changes to modernize the facility beyond recognition.
- Fair Board does an amazing job with the Fair during the five days of the year. One of the issues is figuring out how to pool the resources and knowledge to break even during the rest of the year. There is a need for marketing capacity (create branding, style guides), as well as financial expertise to review fees for events and rentals.
- Work with the County to take advantage of in-house expertise in economic development, tourism and marketing.
- Consider making Fair Staff County employees. Evaluate the organizational structure to consider more efficient and beneficial arrangements.
- Would like to see historical signs on site.
- Is this the right location for the Fair? Is there a better location elsewhere?
- County needs to embrace the Fairgrounds. Need a better connection between the Fair and County. Make this an economic generator for the Canby and the County.
- Need to have professional marketing/branding staff to book facilities throughout the year and charge appropriate rates.
- Explore what economic impact the Fairgrounds have on the City of Canby. Review the City of Canby hotel study.
- Don't let trade shows bump community events.
- Need a business plan and marketing plan so it can be financially self-sufficient.
- Small Business Development Center out of Clackamas Community College can help with a business plan.
- Marketing plan is needed.
- There is a lack of lodging in the area.
- Fair relies on volunteers, so need to keep an ongoing base of volunteers or pursue other strategies – succession planning.
- Need a business plan and marketing plan to improve revenues. Want Fairgrounds to be a major attraction in the county.
- Use Canby tourist activities website to promote events.
- Facilities are mis-marketed. Change in marketing could increase use of smaller venues for local events.
- Reach out to 4-H kids to learn about what they want and need. Tap into other kids and young adults that are not 4-H.
- Limited lodging in Canby, but hoping to get a hotel.
- Like the traditional feel of Canby fair. Not too many old, traditional fairs available. Bonus and benefit in having the Fairgrounds in Canby is the urban/rural interface. Find sweet spot between historic charm and new experiential vision that next generations are looking for.
- Transit system has a main stop at the Fairgrounds.