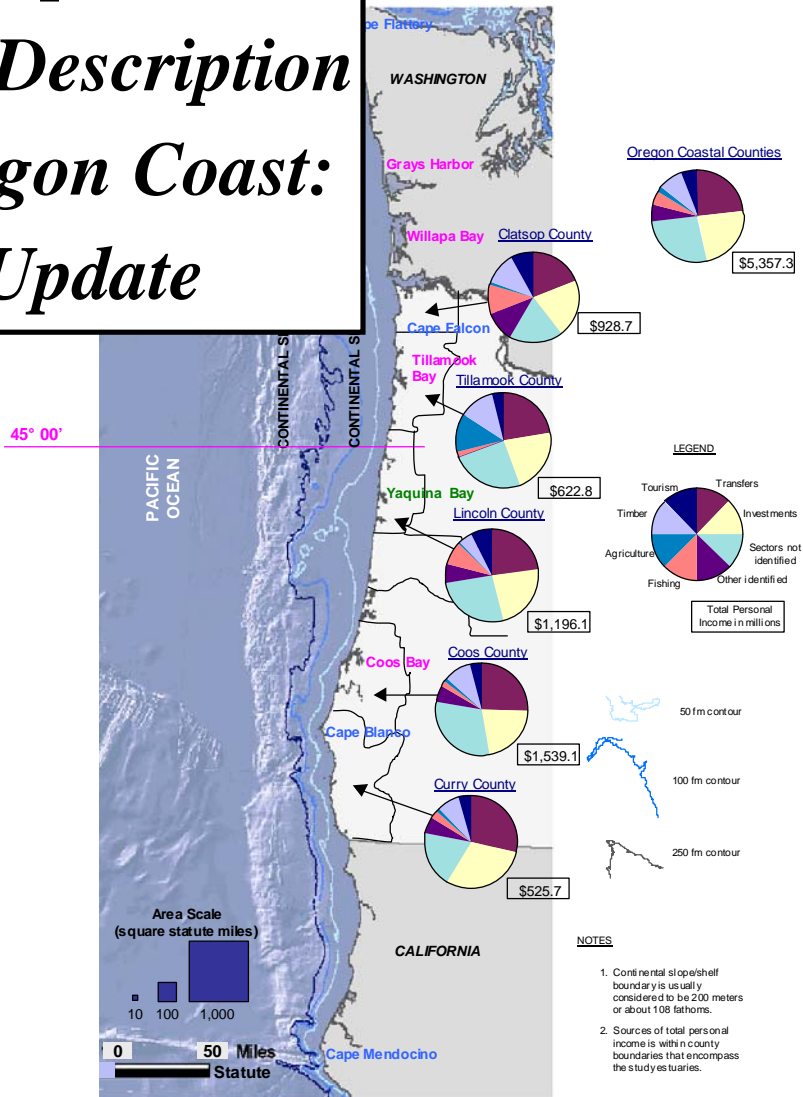


A Demographic and Economic Description of the Oregon Coast: 2006 Update



Oregon Coastal Zone Management Association

March 2006

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A message from Onno Husing, OCZMA Director:

The Oregon Coastal Zone Management Association (OCZMA) has become a trusted source of information about the Oregon Coast's economy. I am pleased to release this report containing social and economic descriptions of the Oregon Coast. It was prepared by The Research Group, Corvallis, Oregon with study principals Shannon W. Davis and Hans D. Radtke. Heartfelt thanks are extended to the Steering Committee and others who provided peer review of this important work.

This update builds upon a landmark coastal economic study prepared by The Research Group for OCZMA in 1994. Data for the update is as current as possible using Year 2000 decennial census and 2003 economic information.

Why is the information so important? This is like taking a chest x-ray of the Oregon Coast. It tells us what's really happening inside our economy. Local leaders can use this information to guide economic and community development activities. The report is an invaluable asset to grant writers because it organizes and analyzes data about the Oregon Coast from a variety of sources and analysis perspectives into a single document.

Then and Now: A Sense of Revelation

When the 1994 report was published, people were astonished to learn that the tourism industry only produced seven percent of the total earned personal income on the Oregon Coast (1991 data). Things have not changed much since 1991. In 2003, tourism only contributed six percent of the earned income on the Oregon Coast. We are not suggesting tourism is an unimportant industry on the Oregon Coast. Rather, we are merely placing tourism into a larger context.

Here's another important finding. In 1991 and 2003, transfer income (social security and other forms of government assistance) constituted 24 percent of total personal income on the Coast. Investment income (retirement accounts such as 401k accounts and pensions) constituted 23 percent (of the total personal income on the Coast. So, taken together, transfer payments and investment income make up 46 percent of the total earned income on the Oregon Coast. Those shares compare to 24 percent for Oregon and 31 percent for the U.S. This demonstrates how important retirees have become to the Oregon Coast.

What about other leading coastal industries? In 2003, timber is at nine percent of the coastal economy (down from 12 percent in 1991). In 2003, commercial fishing is the same percent for the Coast (at five percent) as in 1991. Agriculture has dropped to two percent in 2003 down from four percent in 1991. However, in Tillamook County, agriculture remains a major industry.

What Else is the Data Telling Us?

- There has been a decade of aggregate economic growth on the Oregon Coast. The natural resource industries have declined and tourism has stayed about the same. Increases in economic growth cannot be assigned to any single industry. Rather, the growth seems to be occurring through a variety of small businesses. This represents a welcome trend toward economic diversification of the Oregon Coast.
- Today, the Oregon Coast is less susceptible to dramatic swings in unemployment due to national economic business cycles.
- There has been a boom in the market for “second homes” on the Oregon Coast. In some coastal communities 50 percent of the housing stock are second homes. The median value of owner-occupied homes is less than Oregon. But, the residential assessed value per capita is much higher (which demonstrates the presence of higher-valued second homes on the Coast than the rest of Oregon). These second homes increase the property tax base. Unfortunately, the strong demand for second homes is pricing many coastal residents out of the housing market.
- The population is growing on the Oregon Coast. However, these increases are in older age groups. Natural population increase (births minus deaths) decreased to negative for the first time in Oregon coastal counties. The net migration growth is coming from the national “boomer generation” age cohorts. As these people reach retirement age they are coming to the Oregon Coast seeking a higher quality of life. Most migration is coming from California. Curry County has the highest growth of retirees but all coastal counties are experiencing an aging of the population (with lower school enrollments).
- Household incomes are lower along the Oregon Coast than the rest of Oregon. There are more people working in lower wage brackets. In addition, there are more part-time jobs on the Oregon Coast than statewide. The poverty rate on the Oregon Coast is slightly higher than the rest of Oregon. However, consider this. In some coastal communities, 70 percent of the children enrolled in school live in households that qualify for assisted school lunch programs.

Learning More About the Retirement Sector

The Steering Committee did not formulate policy recommendations about the large retirement community on the Oregon Coast. The bottom line is we don't know enough about these retirees to make recommendations. Additional original research on retirees on the Oregon Coast needs to be carried out. For instance, we need to learn more about their needs and their spending habits. This information can help us develop strategies to capture more of the dollars retirees spend here on the Oregon Coast.

Looking ahead, because of broadband technologies, more people will be moving to the Oregon Coast to live and work— and not just older retirees. This trend is already quietly underway. Telecommuters, for instance, are using the Internet to communicate with home offices located off the Oregon Coast. Indeed, I sense that the Oregon Coast is about to experience a major transition.

Useful Information at Your Fingertips

There are many tables and figures in the report showing data up to Year 2003 for most characteristics. If future years' characteristics are desired, there is an extensive bibliography containing serial publications where the data can be found. An interesting phenomenon that has happened since the last publication is the wholesale availability of data on the internet. An appendix contains the domain names organized by data subject to get the data in that manner. (A computer file can be downloaded from www.oczma.org containing this report in Acrobat Reader format, which has an appendix formatted using a "clickable" feature so the complicated domain names don't have to be retyped.)

It has been an honor to develop this update. We want to express gratitude to the three Regional Investment Boards on the Oregon Coast who funded the study. We hope the report helps people understand the unique qualities that define the Oregon Coast.

A handwritten signature in black ink, appearing to be "C. J. S.", located at the bottom left of the page.

*A Demographic and Economic Description
of the Oregon Coast:
2006 Update*

Prepared by

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The Research Group
Corvallis, Oregon

Prepared for the

Oregon Coastal Zone Management Association

March 2006

PREFACE

This study was sponsored by the Oregon Coastal Zone Management Association (OCZMA). The OCZMA is a voluntary association of over 40 local coastal governments comprised of counties, cities, ports, Indian tribes, and soil and water conservation districts. The OCZMA contract manager, Onno Husing, Executive Director, provided insight and understanding of the issues facing coastal communities. Funding was provided by the three Regional Investment Boards on the Oregon Coast through a true multi-regional grant partnership.¹

The study consultant was The Research Group, Corvallis, Oregon. Shannon Davis and Hans Radtke were the principal authors. The authors were greatly assisted by Kari Olsen at The Research Group. While other contributors provided information and comments, the principal authors take sole responsibility for describing project results.

This report provides updated information for a study completed in 1994 for the OCZMA. The same type of analysis was used in a study completed for the Pacific Northwest Coastal Ecosystems Regional Study (PNCERS) Project in 2002. However, the PNCERS report was limited to only counties containing the Coos River and Tillamook Bay estuaries. The PNCERS report also had analysis for two coastal counties in Washington containing the Willapa Bay and Grays Harbor estuaries. This new report updates and summarizes changes that have occurred in the last decade, and does not repeat all background material contained in the 1994 OCZMA report. It is encouraged that readers get copies of the 1994 OCZMA report and/or the PNCERS report if they are interested in expanded explanations about coastal economies and their relationship and contrasts with a State and national level economic perspective.

This report was reviewed in draft form to provide candid and critical comments. This feedback helped make the findings of this report as sound as possible and ensures the report meets standards for objectivity, evidence, and responsiveness to the study charges. Although reviewers provided many useful comments and suggestions, they were not asked to endorse study findings and recommendations. The authors are solely responsible for making certain independent examination of this report. We undertook that task in accordance with accustomed procedures and review comments were carefully considered.

The authors' interpretations and conclusions should prove valuable for this study's purpose. However, no absolute assurances can be given that the described results will be realized. Government legislation and policies, market circumstances, and other situations will affect the basis of assumptions in unpredictable ways and will lead to unanticipated changes. The information should not be used for investment or operational decision making. The authors and OCZMA do not assume any liability for the information and shall not be responsible for any

1. The Regional Investment Boards representing coastal counties are the BL3 (Benton, Lane, Lincoln, and Linn counties), CCD (Coos, Curry, and Douglas counties), and Northwest Oregon Economic Alliance (Clatsop, Columbia, and Tillamook counties). Regional Investment Boards were created by the 1999 Oregon Legislature to identify and coordinate regional economic and community development priorities. The three Boards representing coastal counties distribute funding from the Regional and Rural Investment Fund to create and retain family wage jobs and leverage and attract capital investment.

direct, indirect, special, incidental, or consequential damages in connection with the use of the information.

Authorization is granted for the study report's contents to be quoted either orally or in written form without prior consent of the authors. Customary reference to authorship, however, is requested.

ACKNOWLEDGEMENTS

A steering committee, comprised of the following members, provided study monitoring.

Steering Committee Members (invited)

Bill Boggess, Department of Head, Oregon State University (OSU) Agriculture and Resource Economics
Councilman Jack Brown, City of Depoe Bay
Commissioner Ralph Brown, Curry County
Chris Chandler Di Torrice, Director, Lincoln County Economic Development Alliance
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Gil Sylvia, Director, Coastal Oregon Marine Experiment Station
Guy Tauer, Oregon Employment Department (Medford)

Other study collaborators that were contacted for participation follow.

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Oregon Department of Fish and Wildlife (Harry Upton)
Oregon Department of Forestry (Gary Lettman)
Oregon Department of State Lands (John Lilly)

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Economic Development Council of Tillamook County (Christy Vail)
Lincoln County Economic Development Alliance (Chris Chandler Di Torrice)
Northwest Oregon Economic Development Alliance (Mary McArthur)

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Oregon Department of Transportation (John Baker and Terry Cole)
Oregon Economic and Community Development Department (John Gorlorwulu)
South Coast Development Council (Ron Opitz)
Umpqua Economic Development Partnership (Helga Conrad)

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Coos, Curry, Douglas Business Development Corporation (Larry Andrew)
Lane Council of Governments (Milo Mecham)
Oregon Coastal Zone Management Association (John Griffith)
Oregon Sea Grant Program (Jay Rasmussen)
OSU Extension Service (Kaety Hildenbrand)
Portland State University (George Hough)
Umpqua Regional Council of Governments (David Voss)

AUTHORS

The Research Group assigned the principals Shannon Davis and Hans Radtke to the study.

Shannon Davis is a planner, statistician, and systems research specialist with 30 years of experience in the field of planning and economics. He received his bachelor of science degree from the University of Oregon in 1971 and accomplished his master of science program at Colorado State University in 1972. His professional interests are in single/multiuse natural resource planning and management with a specialty in resource economic modeling. Mr. Davis served two terms on the Pacific Fishery Management Council's (PFMC) Scientific and Statistical Committee (SSC), during which time the Fishery Management Plan for Salmon Management was converted into a framework plan. Mr. Davis has collaborated with Dr. Radtke on numerous projects requiring econometric modeling. Mr. Davis has worked on the social and economic chapters of many federal environmental economic impact statements (EIS). Recent example projects are the Puget Sound Chinook Management Plan EIS and Lower Snake River Juvenile Salmon Migration Feasibility Report and EIS. Mr. Davis completed the most recent update to the West Coast Fishery Economic Assessment Model (FEAM) for the PFMC. (The FEAM is used to analyze management alternatives for various fisheries' species and species complexes under the jurisdiction of the PFMC.) Mr. Davis was the study principal to develop the Oregon Ports Reporting System and a resulting study that reports on Oregon ports economic contributions to local communities.

Hans Radtke is a professional resource economist who has worked many years in natural resource management. He completed his bachelor of science degree from Portland State University in 1964, received a master of science program from Montana State University in 1969, and accomplished his doctorate degree from Oregon State University (OSU) in 1972. He is currently an adjunct professor at OSU. He specializes in the relationships of resource-based industries and regional, state, and national economies. He has completed many economic

impact, feasibility, and policy analyses and developed computer models for the economic assessment of fisheries management alternatives. In 1993, he provided the economic analysis on coastal fisheries and tourism for President Clinton's Forest Summit Interagency Team. He was a volunteer advisor in Russia for the transition to privatization of agriculture (1994), and has done work for the World Wildlife Fund in Mexico (1997). He is currently serving a third term as a member of the Oregon Governor's Council of Economic Advisors. In 1997, he was appointed to the PFMC, of which he was Vice-Chairman in 2000 and Chairman in 2002-2003. He is on the PFMC's SSC for a four year term starting in 2003. He is a member of the Independent Economic Analysis Board (IEAB), an advisory board to the Northwest Power and Conservation Council (NPCC) for a four year term beginning in October 2001. Recent example projects are the State of Washington public grazing lands economic impact study for the Joint Legislative Audit and Review Committee (JLARC) and the economic contribution of Columbia River anadromous salmonid species production for the NPCC.

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