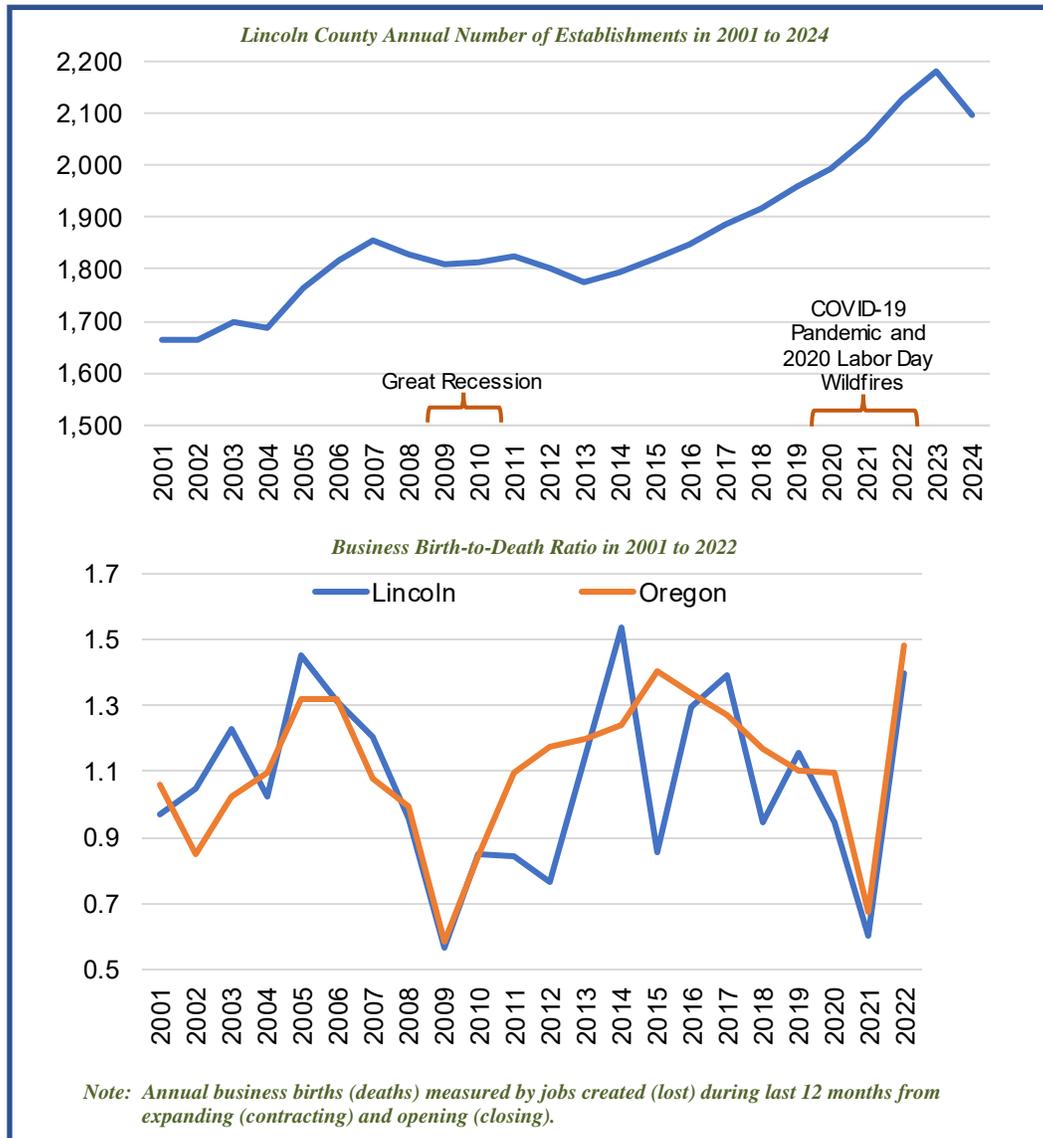


# LINCOLN COUNTY, OREGON ECONOMY STATUS IN MIDDLE 2020'S



**Economic Development Alliance of Lincoln County**

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# **LINCOLN COUNTY, OREGON ECONOMY STATUS IN MIDDLE 2020'S**

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**prepared for:**

**Economic Development Alliance of Lincoln County**

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## Preface

This study report was prepared for the Economic Development Alliance of Lincoln County (EDALC) by The Research Group, LLC (TRG) located Corvallis, Oregon. The Lincoln County Board of Commissioners sponsored the study. The primary author at TRG was Shannon Davis who was greatly assisted by Kari Olsen. Hans Radtke, Ph.D. Natural Resource Economist Consultant provided valuable assistance for understanding the local economy and suggesting economic development opportunities. Critical eyes were provided by Tommy Swearingen, Ph.D. (sociologist recently retired Oregon Department of Fish and Wildlife marine reserve program leader ) and Gil Sylvia (economist recently retired Coastal Oregon Marine Experiment Station executive director).

This new study's economic analysis is based on preceding investigations by the same author. The most recent was sponsored by the Oregon Coast Visitors Association (OCVA) and is titled "Oregon Coast Year 2021 Sources of Income Study," January 2024. That study followed a series of economic analysis projects started in the early 1990's by the Oregon Coastal Zone Management Association (OCZMA). The last OCZMA study was titled "A Demographic and Economic Description of the Oregon Coast: 2006 Update," March 2006. Over time, the OCZMA reports became widely used sources of information on the Oregon Coast's economy. This new study report can be considered an update to another report completed for the Lincoln County Board of Commissioners titled "Ten Year Update on Lincoln County, Oregon's Economy," August 2014. Given this new study design draws substantially on economic modeling methods, data, and results described in previous economic analysis studies, recounting and paraphrasing from those studies publications are used in this report sometimes without attribution.

Two staff members at EDALC need to be recognized for their instrumental and timely assistance in leading the report's development: Paul Schuytema, Executive Director and Sarah Buddingh, Rural Economic Research and Engagement Manager. Coordination meetings were held with these study leaders during the development of this report. The meetings had thoughtful and informative conversations regarding data availability and meaning. Meeting results helped define study direction and depth. Relevant review comments from the staff members and others were carefully considered and addressed in preparation of the study report. The review feedback helped make the study findings as sound as possible and ensures the report meets standards for objectivity, evidence, and responsiveness to the study charges.

The conduct of the study included interviewing government agencies and business establishment representatives. The informal conversations provided important analysis inputs when serial data sources needed to be supplemented and/or verified. The interviewees were generous in their time and need to be complimented for their assistance. Because authorization was not sought to mention names, TRG thanks them anonymously for their participation.

Although reviewers provided many useful comments and suggestions, they were not asked to endorse study results. The authors are solely responsible for content. The report contains

methodologies recommended with the understanding that technically sound and defensible approaches would be used. Where judgment became necessary, conservative interpretation was to be employed. Because this philosophy was strictly adhered to in all aspects of the report, the materials developed are deemed useful descriptions of economic implications and contain reasonable estimates of the current economy.

The report is prepared to assist in understandings and decision making. The author's interpretations and recommendations should prove valuable for that purpose, but no assurance can be given that decisions based on this plan will fulfill expectations of market demands nor achieve financial projections. Government legislation and policies, market circumstances and other situations can affect the basis of assumptions in unpredictable ways and lead to changes in study conclusions.

## Table of Contents

	<u>Page</u>
Preface .....	i
Table of Contents .....	iii
Glossary Annotated.....	v
Abstract.....	viii
Summary.....	ix
I. INTRODUCTION	
A. Background .....	I-1
B. Purpose .....	I-1
C. Scope.....	I-2
D. Report Contents .....	I-3
II. METHODS	
III. DRIVER INDUSTRIES ECONOMIC CONTRIBUTIONS	
IV. SOCIAL INDICATORS	
A. Demographics .....	IV-1
B. Labor Force.....	IV-4
C. Households and Individual Income .....	IV-10
D. Housing Inventory .....	IV-14
E. Business Formation .....	IV-16
F. Retiree Purchasing Power.....	IV-19
G. Well-being and Other Social Measures .....	IV-22
V. ECONOMIC DEVELOPMENT CHALLENGES	
VI. DATA PROVENANCE AND BIBLIOGRAPHY	
A. Selected Provenance .....	VI-1
B. Bibliography .....	VI-2
VII. ENDNOTES	

## List of Tables and Figures

Table S.1:	Lincoln County Economic Development Challenges
Table III.1:	Lincoln County Sources of Total Personal Income in 2012 and 2021
Figure III.1:	Economy Drivers in 2021
Table IV.A.1:	Population and Median Age Change 2000-2023 in Coast Counties, Oregon, and U.S.
Table IV.A.2:	Population Age Characteristics and Components of Change in 2023 in Lincoln County
Figure IV.A.1:	Net Migration by Age: Lincoln County and Oregon
Figure IV.A.2:	Education Attainment for Working Aged Adults (25 and Older) in Year 2023

## List of Tables and Figures (cont.)

- Table IV.B.1: U.S., Oregon, and Lincoln County Civilian Labor Force and Class of Worker in 2023  
Figure IV.B.1: Lincoln County Civilian Labor Force by Month in 2003 to 2024  
Figure IV.B.2: U.S., Oregon, and Lincoln County Unemployment Rate by Month in 2003 to 2024  
Figure IV.B.3: Lincoln County Annual Covered Employment and Wages in 2003 to 2024  
Figure IV.B.4: Lincoln County Employment Inflow/Outflow for 2022  
Table IV.B.2: Lincoln County and Oregon Blue Economy Employment in 2021
- Figure IV.C.1: Personal Income Source Shares in 2003 and 2023  
Table IV.C.1: U.S., Oregon, and Lincoln County Personal Income Distribution in 2023  
Figure IV.C.2: Cities in Lincoln County Per Capita Income in Year 2023  
Figure IV.C.3: Lincoln County Poverty Rates by Major ZIP Code Groups in Year 2023
- Figure IV.D.1: Second Homes as a Percent of Total Housing Units for Oregon and Coastal Counties in 2023  
Figure IV.D.2: U.S., Oregon, Coastal Counties, and Lincoln County Household Debt-to-Income Ratio in 2000 to 2024
- Figure IV.E.1: Lincoln County and Oregon Business Birth-to-Death Ratio in 2001 to 2022  
Figure IV.E.2: U.S., Oregon, Coastal Counties, and Lincoln County Business Formation Trends in 2005 to 2024
- Table IV.F.1: Coastal Counties Retiree Effect on Potential Purchasing Derivation in 2023  
Figure IV.F.1: Coastal Counties Retiree Effect Potential Purchasing in 2023
- Table IV.G.1: Lincoln County Health and Social Characteristics  
Table IV.G.2: Coastal Counties and Oregon Prosperity Measures in 2021

## Appendices

- A. Lincoln County Abbreviated Social and Economic Characteristics and ZIP Code Areas
- B. Sources of Total Personal Income in Coastal Counties in 2021
- C. Population, Housing, Geographic, Health, and Social Characteristics by State, Coast, and Coastal County

## Glossary Annotated

Covered employment	Wage and salary employment that has mandatory unemployment compensation insurance coverage.
EDALC	Economic Development Alliance of Lincoln County
Economic value	Economic value attempts to measure the net benefits from using a resource and the value people place on the resource. Economic contribution measures how much money is "stirred up" in an economy by using or enjoying a resource.
GDP	Gross Domestic Product
HMSC	Hatfield Marine Science Center
Investments	Personal income from private investments (sometimes called property income) has sources for rent, interest, and dividends. Private pension payments are in this source of income.
MOC-P	The NOAA Marine Operations Center-Pacific (MOC-P) serves as a homeport for NOAA research and survey ships and provides administrative, engineering, maintenance and logistical support for NOAA's Pacific fleet.
Multiplier effect	The multiplier effect results from re-spending within the regional economy which is afforded by business activities that have sales outside the regional economy. The recipients of the direct expenditures made within the regional economy spend that money to purchase necessary goods and services for an indirect-multiplier effect. The beneficiaries of the direct and indirect spending in turn spend that revenue on unrelated goods and services, which generates an induced-multiplier effect. There is only so much goods and services that can be bought within the regional economy and eventually the original sales money all leaks to outside economies.
NOAA	National Oceanic and Atmospheric Administration
Net earnings	Personal income from net earnings is receipts from wages and salaries, and proprietorship net income. Payers can be private businesses and government.
OCVA	Oregon Coast Visitors Association
OCZMA	Oregon Coastal Zone Management Association
PSUPRC	Portland State University, Population Research Center

Personal income	Income accruing to households in the form of transfer payments, returns on investments, and net earnings. Current and historical estimates are provided by the U.S. Bureau of Economic Analysis. Compilations are for place of residence.
Regional economic impact (REI)	Economic contribution and REI are separate/different concepts. But in this report the two terms are used interchangeably. The term "impact" usually refers to an economic activity that is subtracted or added to an economy. It is the share of the regional economy supported by the expenditures made by the industry being analyzed. It can be expressed in terms of a variety of economic metrics. A stricter use of the term "contribution" would be for an economic activity that exists rather than an activity that is a change. The measurement for economic contribution and REI in this report is personal income and it includes the "multiplier effect."
SWOT	A Strengths, Weaknesses, Opportunities and Threats (SWOT) analysis considers the internal factors (strengths and weaknesses) and external factors (opportunities and threats) that influence economic development in a region. The analysis is usually accompanied with a survey and/or committee process that sorts out priorities to be addressed in economic development planning.
TRG	The Research Group, LLC
Transfer payments	Transfer payments are to persons for which no current services are performed. It consists of payments to individuals and to nonprofit institutions by federal, state, and local governments and by businesses. Principal categories of transfers are income maintenance (such as family assistance payments, Supplemental Nutrition Assistance Program formerly known as the food stamp program, worker's compensation, etc.), unemployment insurance payments, and retirement payments (such as Social Security, medical payments - mainly Medicare and Medicaid, veterans benefits, Bureau of Indian Affairs benefits, payments to nonprofit organizations that serve individuals, etc.). Business payments to persons consist primarily of liability payments for personal injury and of corporate gifts to nonprofit institutions. Transfer payments exclude payments by the federal government for work under research and development contracts.
ZIP code area	When ZIP code areas are used for indicators, the data source is ACS and they are shown associated with the encompassing city. If there are two or more ZIP codes in the association, absolute data is summed, and ratio statistics are weighted averages by population for whom poverty status is determined, or number of households. ZIP code area maps are used by the U.S. Postal Service for mail delivery purposes. The U.S. Census Bureau interprets the

maps to delineate ZIP Code Tabulation Areas (ZCTA's). Most demographic data for ZCTA's are from the ACS.

## Abstract

The Economic Development Alliance of Lincoln County (EDALC) was interested in updating an existing report about the status of the County's economy. The Lincoln County Board of Commissioners provided funding for the study. A retained consultant used an economic base model consistent with previous research that shows local and coastwide trends. The previous research was completed most recently for the Oregon Coast Visitors Association (OCVA). The OCVA sponsorship continued a series of reports issued by the Oregon Coastal Zone Management Association (OCZMA). The EDALC report looks at 20-year trends in general and a recent year snapshot in more detail. The report explains the economic and social indicator implications for economic development efforts. The report describes the recovery periods following the Great Recession (2008-2009) and COVID-19 pandemic (2020-2022). The latter period was exacerbated by effects from the 2020 Labor Day Wildfires. There has been continued total personal income real growth over the 20-year time frame in Lincoln County. Of the three components for personal income, the proportional contribution from investment income has remained steady, the proportion from transfer payments has risen and the proportion from net earnings has decreased. For the net earnings component, there is still relative importance of natural resource based industries, but increases in jobs are related to travel tourism and specialized industry categories such as marine science and health services. The decreased dependence on the timber industry has meant the economy is less susceptible to dramatic swings when there are national business cycle downturns. There has been a boom in "second homes" which has fueled tourism but also caused inflated housing prices and puts demands on existing community infrastructure. In-place population aging coupled with in-migration of retirees has changed purchasing patterns and demands for housing and services. Housing affordability is a problem for filling new job openings. Cost and availability of child care and presence of broadband services for remote working and telemedicine are also concerns of potential worker talent. Skilled jobs will largely need to be filled with in-migrants because of limited mobility within labor force and out migration of educated young adults. These hiring problems ultimately negatively impact business growth and economic competitiveness. Industry cluster analysis will identify existing opportunities for economic development assistance and promotion programs. "Blue economy" businesses and agencies are a particularly important cluster in Lincoln County. Economic development efforts should focus and stay within the bounds of the area's comparative advantages. The public can be left with high costs and underused land from misguided economic development pursuits. New businesses will be interested in the area's quality-of-life for its owners and workers, low electricity rates, readily available commercial and industrial lands and provision of public services. These amenities in Lincoln County will help ameliorate challenges in having distant product markets and limitations in transportation facilities. Economic development success will take continuous monitoring and feedback mechanisms so that standing economic development assignments can pivot as local, national and world conditions (technology, markets, government programs, etc.) change. Revisiting strategies and updating directions are an ongoing process that leads to economic development effort timeliness and applicability. Lincoln County has the local leaders and organizations in-place for providing the resources and assistance for furthering economic development.

## Summary

### Introduction

A study report sponsored by the Lincoln County Board of Commissioners was prepared by a consultant for the Economic Development Alliance of Lincoln County. The report provides current information about the status of Lincoln County's economy. The content serves to update and focus previous county level information prepared by the same consultant. Telltale economic and some social indicators are included in the report. Inferences are drawn from indicator trends and discussed in a chapter about economic development challenges and opportunities.

The report has result discussions about an economic model recently prepared for the Oregon Coast Visitors Association (OCVA). The model's output is for a consistent set of economic performance measures typically used to promote and plan for economic development such as attracting new businesses and promoting tourism. The performance measures rework categories of the resident personal income net earnings component (i.e. wages/salaries and proprietorship net income) of the County's household and individual total personal income. The other two components of personal income are investment income (i.e. returns from dividends, interest and rent) and transfer payments (i.e. payments such as Social Security and unemployment benefits from the government or businesses). These latter two components are associated with purchases made by the retiree age cohort to show effects from the County's changing demographics.

The economic model's regenerated net earning categories are for a unique set of industries associated with economic development efforts. The set includes four base industries (commercial fishing, agriculture, timber, and travel tourism) and two agglomerated industries ("other identified" and "other identifiable"). Recent special studies completed by other authors were synthesized to compile the base industries economic impacts. There is another category called "other not identified" that is calculated as a residual to account for all net earnings. The "other not identified" has other businesses found on the Oregon Coast which cannot be revealed due to data confidentiality and/or data specification issues. Income returned from commuting to outside-of-area located jobs would also be included in the "other not identified" category. The economic impacts of the set of base and agglomerated industries would include all businesses that depend on those industries such as retail trade, professional services, etc.

The report has discussions about 20-year trends with more details about current year snapshots. The performance measures trends over the 20-year period show the economy adjusted and grew with a long national business cycle trajectory early in that period and then suffered the effects from the Great Recession starting in 2008. An upwards trajectory recovery was interrupted in 2020 due to the COVID-19 pandemic which was exacerbated by effects from the 2020 Labor Day Wildfires. Since the pandemic beginnings, there has been a tepid regaining of economic activity levels.

A new interruption to economic trends has started with the January 2025 change in the federal executive branch. Preceding the current federal administration, there were federal and state government funding and policies encouraging market development for prevalent local export industries such as commercial fishing and marine science. Current policies related to foreign trade (example import tariffs) and renewable energy (examples wave and offshore wind) have caused economic and government funding support uncertainty. At the same time, it is not clear how policy changes will affect federal and state natural resource management. It could be there will be new opportunities for local industries and institutions to pursue with the changed funding and management policy emphases.

Demographically, the area's population change is transforming from young families raising children to a population dominated by retirees drawn to the quality of life on the Oregon Coast. This aging demographic has profound implications for the general school population and the services that local governments and communities need to provide. The demographic and economic changes deserve consideration to assist in keeping economic development planning strategies current.

The report also has other economic and social indicators such as for business formation, housing stock, and wellbeing. Having comprehensive measures at the county level is helpful to planning and policy makers. Their efforts can focus on goals and objectives for directing and accommodating changes, rather than producing background information.

While there are current upheavals in federal and state level policymaking that will affect the local economy, any attendant disruptions have not yet been widely captured in serial data. The study report's timeline uses available data and analysis results. The driving industries profile is for data Year 2021. This year is greatly influenced by COVID-19 pandemic and has general economy and social relief program influences. Lincoln County and several other counties in Oregon had compounding adverse impacts from the 2020 Labor Day Wildfires. Social indicators using serial sources of information is mostly through Year 2023, and for some indicators, through Year 2024. Economic and social adjustments from the COVID-19 pandemic and wildfires continue to play out and are not yet fully reflective in the economic and social data currency.

### Economic and Social Indicator Trends

Findings from the economic analysis and review of social indicators follow.

- There has been continued absolute and proportional growth of transfer payments and the continued decline of proportional net earnings. In the last two decades, Lincoln County transfer payments increased from 23 percent of total personal income to 31 percent. Net earnings proportions decreased from 54 percent to 45 percent. Investment income was steady at 24 percent. So taken together, investment income and transfer payments make up 55 percent of the total personal income at Lincoln County in 2023. This share is compared to 54 percent for the Coast

and 42 percent for Oregon. Retiree age reliance on these income sources shows the importance of this cohort's spending on the local economy.

- Using shares of 2021 resident net earnings in Lincoln County, the area's driving industry categories are commercial fishing 16 percent, agriculture one percent, timber three percent, and travel tourism 23 percent. The two agglomerated industries for other identified (such as paper/paperboard mills, waterborne commerce, steel fabrication) and other identifiable (such as marine science, schools, health) are 12 percent and 26 percent, respectively. The residual net earnings (catch-all category for businesses not identified and earnings from jobs not located in the County) was 19 percent.
- The relative importance of natural resource based industries as a source of personal income has declined as other industries have increased in the last two decades. Some reasons are: (a) Decreasing availability of natural resource for harvests due to new demands for using natural resources for recreation. (b) Increasing management attention for ecosystem conservation and harvest sustainability. (c) Increasing use of technology and processing centralization which has replaced labor requirements.
- Lincoln County and other coastal counties have in the last two decades undergone significant economic transitions. Traditional resource-based industries like commercial fishing and wood products have declined in relative importance. Trade and service jobs associated with businesses serving tourism and retirees have increased. Agriculture in coastal counties has remained fairly constant because of the influence of the dairy industry in Tillamook County. There has been an increase of "other" industries in coastal counties, which replaced the relative importance of natural resource industries. The data indicates that Lincoln County's economy is more diversified and healthier than 15 years ago. The decreased reliance on extractive industries has made Lincoln County's economy less susceptible to national business cycle downturns.
- One industry cluster relevant to Lincoln County is referenced as the "blue economy." This cluster is a geographic concentration of marine, maritime, and freshwater-focused businesses, supported by universities and governments, that collaborate to foster innovation and sustainable economic growth. The EDALC has taken a lead in participating in a statewide effort to establish several blue economy hubs along the Oregon Coast. The Newport area is one of the hubs. The focus on ocean related businesses is to turn away from unsustainable past strategies and launch assistance programs for the industries of the future.
- The Great Recession (years 2008-2009) and the COVID-19 pandemic (years 2020-2022), which was exacerbated by effects from the 2020 Labor Day Wildfires, interrupted the trend of economic growth in Lincoln County. In each case, following

aggregate overall growth trends have increasing trajectories. The recovery since the pandemic and wildfires is less robust than since the Great Recession.

- Lincoln County and the Coast have become less susceptible to dramatic swings in unemployment which was caused in the past by dependence on natural resource industries affected by national economic business cycles. In the last fifteen years, coastal counties have closer unemployment rates to those in the rest of the State and U.S.
- Lincoln County business establishment net numbers increased from 2013 through 2023 then slightly declined in Year 2024. Measured by the number of employees for business count changes, the ratio of birth-to-death shows negative growth (i.e. the ratio is less than one) for beginnings of the Great Recession (2008) and COVID-19 pandemic (2020). In each case there was following positive growth starting 2013 and 2022, respectively. The presented data is a glimpse of business formation history, however economic development efforts need forward looking at the assistance requirements for startups and entrepreneurship. Beyond considerations for operational costs and sales to target markets for the business products, startup decisions to locate in Lincoln County will look to factors such as quality-of-life for owners and workers along with labor force mobility capacity, broadband presence, education and training accessibility, and commercial and industrial land availability. Potential worker talent will also be concerned with housing cost and childcare availability and cost. Unless costs are reasonable, attracting employees may be difficult. These hiring problems ultimately negatively impacts business growth and economic competitiveness.
- Income inequality statistics can be misleading when averages are used as indicators. A few households in very high income brackets can mask the effects of many households in lower income brackets. Lincoln County has far fewer households in the highest income brackets than the State. The lower income profile faces a housing problem. Workers are unable to secure affordable housing as rising demand for coastal property has priced homes and rentals out of their reach. This lack of workforce housing in turn makes it more difficult for employers to attract and retain workers in occupations such as trade and service workers. This is especially true for businesses oriented towards the tourism industry.
- There has been a boom in the market for "second homes" in Lincoln and all coastal counties. 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. These second homes increase the property tax base, but also increase public service costs for residents. The strong demand for second homes is pricing many coastal residents out of the housing market.

- Looking at demographics, Lincoln County and the Coast's population continues accelerating away from young families raising children and moving toward retirement age population who have either stayed-in or relocated to the region to enjoy the environment and quality of life.
- The changing demographic of coastal areas has led to a shift in income and employment opportunities. As the population of coastal counties has continued to age in the last two decades, income from transfer payments has risen. This cohort's purchasing power coupled with travel tourism spending has increased proportional employment in the trade and services industries.
- The population is growing in Lincoln County and on the Oregon Coast. However, the increases are in older age groups. Natural population increase (births minus deaths) decreased to negative for the first time in Oregon coastal counties during the 1990-00 intercensal period. 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.
- In-migrating retirees use past accumulated wealth for purchasing. They tend to use online banking with accounts staying where they came from. Additional research of the consumption patterns in local coastal areas as well as demand for local services by age and income groups is needed to provide information on business and local government financial impacts for this growing population cohort.
- Well-being and prosperity characteristics were reviewed. The well-being indicators included educational attainment, access to health services, substandard housing, and crime rate. The prosperity indicators were assessed value per capita, effective buying income, bank deposits, and retail sales per household. All statistics show Lincoln County and the Coast are quite different than the State. In general, income was less but quality-of-life measures were higher.
- Wealth, when defined by total personal income, has increased at Lincoln County and the Coast because both population and per capita income have increased in recent years. However, household incomes are lower than the rest of Oregon. There are more people working in lower wage brackets. In addition, there are more part-time jobs at Lincoln County and the Coast than statewide. The poverty rate at Lincoln County and the Coast is higher than the rest of Oregon.

### Economic Development Implications

Additional interpretive discussions are provided to understand the implications of change and how economic development planning can sustain Lincoln County's economy. The discussion

offers the authors' derived list economic development challenges. The discussion is not a formal Strengths, Weakness, Opportunities and Threats analysis where stakeholders provide input, but does offer a list of factors helpful to understanding of how indicators can be used in economic development planning. Table S.1 describes the pertinent economic development challenges, albeit the list is not inclusive of all threats and opportunities.

While there are many advantages to promote in economic development efforts at Lincoln County, caution is urged to not go beyond realistic opportunities. There are many examples of communities trying and failing to return to past economic activity levels or pursue unrealistic development through expensive infrastructure and assistance programs. It generally is more effective to stay within the bounds of "comparative advantages" and promote strategies that are flexible and responsive to a changing economic environment. In economic terms, an area may have a comparative advantage over another area for reasons of proximity to production inputs (land and natural resources), capital incentives, ready markets, labor availability, intermodal transportation systems, and communication networks. Success takes continuous monitoring and feedback mechanisms so that standing economic development assignments can pivot as local, national and world conditions (technology, markets, government programs, etc.) change.

Table S.1  
Lincoln County Economic Development Challenges

Threats (not in order of hindrance)

- Labor supply, worker affordable housing, early child care
- Infrastructure – water supply, treatment and distribution; wastewater collection and treatment
- Private timberland trust ownership management coupled with low per volume transportation costs
- Commercial fishing industry consolidation and centralization accelerating
- Second homes - infrastructure built for peak use but usage fees not being collected, subtracts from housing supply that drives up prices, omits affordable housing for beginning and low income buyers
- Air travel restricted, however there are transit alternatives
- Rail and navigation channel limitations
- Perception of impending disasters (earthquake/tsunami, flooding, wildfires)
- Marine science given current federal employment and program budget uncertainty

Comparative Advantages (not in order of precedence)

- Recent expansion of health and hospital services
- Waterway improvements to support commercial fishing and recreational boaters
- BPA service areas electricity rates low (GP uses half of county's power)
- Timberland conservation (especially old growth) and watershed restoration
- Satisfactory access from I-5 via Hwy 20 for tourism and commerce
- Available commercial and industrial land
- Travel industry attractions (i.e. "the beach" and cuisine/cultural charms)
- Marine sciences presence
- Quality of life
- Retiree settlement (in-migration has both positive and negative impacts)
- Leadership in-place and programs underway for positive change through vision and action

## I. INTRODUCTION

### A. Background

General economy descriptive studies are commonly derived from available data for employment in standard industry and occupation categories. However, these categories can cross over economic sectors typically used to promote and plan for economic development such as promoting tourism and attracting retirees. An approach to resolve the need for understanding distinctive economic sector dimensions and trends is to undertake industry special studies.<sup>1</sup> The special studies do not always compare and contrast one sector with another, and because there are different result measurements, it is difficult to determine how all sectors add up to show 100 percent of an area's driving economic forces.

This study uses a consistent economic performance measure for household and individuals income at a reworked source level to show all industry drivers. The three major components of income are: net earnings, investment income and transfer payments. This study regenerates net earnings for a unique set of industries associated with economic development efforts.<sup>2</sup> The set includes for four base industries (commercial fishing, agriculture, timber, and travel tourism) and two agglomerated industries ("other identified" and "other identifiable").<sup>3</sup> There is another category called "other not identified" that is calculated as a residual to account for all net earnings. The "other not identified" has other businesses found on the Oregon Coast which cannot be revealed due to data confidentiality and/or data specification issues. Income returned from commuting to outside-of-area located jobs would also be included in the "other not identified" category. The economic impacts of the set of base and agglomerated industries would include all businesses that depend on those industries such as retail trade, professional services, etc.

This report also has recent demographic (age, housing, etc.), social wellbeing (health, etc.) and business formation statistics. Having comprehensive measures at the county level is helpful to planning and policy makers. Their efforts can focus on goals and objectives for directing and accommodating changes, rather than producing background information. Additional interpretive descriptions are provided to understand the implications of change and how proper economic development planning can sustain Lincoln County's economy.

### B. Purpose

The reason for the new project is to review Lincoln County's regional economy's many changes that have occurred in a 20-year period.<sup>4</sup> The economy adjusted and grew with a long national business cycle trajectory early in that period and then suffered the effects from the Great Recession starting in 2008. An upwards trajectory recovery was interrupted in 2020 due to the COVID-19 pandemic which was exacerbated by effects from the 2020 Labor Day Wildfires.<sup>5,6</sup> Since the pandemic beginnings, there has been a tepid regaining of economic activity levels.

A new interruption to economic trends has started with the January 2025 change in the federal executive branch. Preceding the current federal administration, there were federal and state government funding and policies encouraging market development for prevalent local export industries such as commercial fishing and marine science. Current policies related to foreign trade (example import tariffs) and renewable energy (examples wave and offshore wind) have caused economic and government funding support uncertainty. At the same time, it is not clear how policy changes will affect federal and state natural resource management.<sup>7</sup> It could be there will be new opportunities for local industries and institutions to pursue with the changed funding and management policy emphases.

Demographically, the area's population change is transforming from young families raising children to a population dominated by retirees drawn to the quality of life on the Oregon Coast. This aging demographic has profound implications for the general school population and the services that local governments and communities need to provide. The demographic and economic changes deserve study to assist in keeping economic development planning strategies current.

A single, overarching study to determine area-wide and local trends is a cost effective approach for economic development planning. By having a comprehensive economic and demographic study for the county, individual communities don't need to prepare their own background and assessments. Moreover, one comprehensive look at Lincoln County will make sure information developed is consistent. This study systematically focuses on where the changes are taking place in the economic and social fabric of communities. This provides elected officials and planners the background information to develop management strategies for accommodating impacts to private property, and county and community infrastructure (capital improvements, roads, rail, schools, port and other public facilities). The developed locally relevant economic information will improve local government decision making and aid in economic development efforts.<sup>8,9</sup>

### C. Scope

Some of this report's preface mentioned previous studies were completed for the entire Oregon Coast. For this project, Lincoln County will serve as its own geographic region. It is a fortuitous county choice because studying recent economic and population structural changes and developing economic development interpretations for this particular county will exemplify application elsewhere along the Oregon Coast. From an economic analysis methodological perspective, Lincoln County is a defined labor force participation market. Utilizing a county level economic base model should provide reliable estimates for the defined industry sectors within the geographic scope.

While there are current upheavals in federal and state level policymaking that will affect the local economy, any attendant disruptions have not yet been widely captured in serial data. This study report's timeline uses available data and analysis results. The driving industries profile is for data Year 2021. This year is greatly influenced by COVID-19 pandemic and has general

economy and social relief program influences. Social indicators using serial sources of information is mostly through Year 2023, and for some indicators, through Year 2024. Economic and social adjustments from the COVID-19 pandemic continue to play out and are probably not fully reflective in the economic and social data currency.

It is admonished that an often overlooked aspect of planning and public policy making is monitoring. A clear understanding of how key factors are changing over time is necessary. While not completely capturing the immediate economic disruption, at least the study identifies a list of indicators that can be used in the future to track economic and social trends.

#### D. Report Contents

The report is organized in successive sections matched with a sequence of driving industries and other economic and social trend monitoring indicators. A final chapter discusses the connection between the economic and social information and economic development planning. The discussion offers the authors' derived list economic development challenges. The discussion is not a formal Strengths, Weaknesses, Opportunities and Threats (SWOT) analysis where stakeholders provide input, but does offer a list of factors helpful to understanding of how indicators can be used in economic development planning.<sup>10</sup> An appendix contains a one-page brochure showing pertinent indicators.

This study report is meant to supplement other economic and social data reports that also describe local and countywide conditions.<sup>11</sup> This study novel approach for determining the economy's driving industries provides additional rich content to better understand conditions. Data sources used in the preparation of this study are stated in Chapter VI, Data Provenance and Bibliography.

## II. METHODS

The study dissects the three components of total personal income accruing to households and individuals residing in Lincoln County. The net earnings component is broken down by six unique industry categories particular to the County's economy. The other two components for investment income and transfer payments are looked at from a consumption perspective that demonstrate purchasing power.

The narrative box shows the three total personal income components and the six unique industry categories associated with the net earnings component.

<b>Total Personal Income Components and Net Earnings Unique Industry Categories</b>	
1.	Net earnings
1.1.	Identified industries
1.1.1.	Commercial fishing
1.1.2.	Agriculture
1.1.3.	Timber
1.1.4.	Travel tourism
1.1.5.	Other identified industries
1.1.5.1.	Paper and paperboard mills
1.1.5.2.	Water transportation and marine cargo handling
1.1.5.3.	Ship building, steel fabrication, heavy manufacturing, and construction
1.1.5.4.	Mining
1.1.6.	Other identifiable industries (higher education, research, public health, tribal services, etc.)
1.2.	Other not identified industries
2.	Investments income (dividend, interest, rent, 401k plan disbursements, etc.)
3.	Transfer payments (Social Security, Medicare, income maintenance, education/training, veterans benefits, etc.)

The net earnings unique industry categories are used in an economic base model.<sup>12</sup> The categories are non-standard industry classifications that are distinctive to Lincoln County and other coastal counties economies. Traditional sources of employment information do not always describe all of the employment or income contributed by the basic industries.<sup>13</sup> The adopted economic contribution measurement for the modeling is income. It could just as well have been other measurements such as business output, but the income metric was selected because it is comprehensible for policy making. The scale for the model's local area calculations is at the coastwide economy level reflective of inter-area purchasing that occurs on the Oregon Coast.<sup>14</sup>

The economic base model provides estimates for the six identifiable industry categories' direct, indirect, and induced income at the county level. The first four industry categories estimates

are from statewide economic studies that use economic input-output model response coefficients from IMPLAN.<sup>15,16,17</sup> The other two industry categories employ economic base modeling methods that use a crosswalk of industry classifications populated with employment/payroll data provided by the Oregon Employment Department. Economy response coefficients are from the U.S. Bureau of Economic Analysis (BEA) Regional Input-Output Modeling System known as RIMS II.

The calculation of investment and transfer economic contributions include an assumed coastwide out-of-area purchase coefficient and a household sector consumption multiplier. This means the modeling shows all the economic contributions for spending from these two components. This is different from other references to this data that just tell the components receipts. The authors previous studies assumed there was a one-to-one relationship with investment and transfers receipts.

The "other not identified" industry category includes many small manufacturing and service companies that sell products outside the coastal area. These includes businesses such as foundries, plastic injection mold manufacturers, computer hardware and software developers, writers, and artists. Such small businesses are important when summed together, however, they are too dispersed to be identified. Commuting to out-of-area places of work is also included in the other not identified category.

The study analysis target year is 2021. It was the most recent data year from most sources at study coincides with the COVID-19 pandemic duration that had general economy and social relief program influences.

Social trends are itemized for demographic, housing, health and well being indicators. An interpretive task overlaps the economic and social analysis - emerging economic development issues, influences and consequences of natural resource management, and how descriptive indicators can be used for policy and planning are discussed.

Lincoln County's indicators are sometimes compared to the Coast, and when of interest, indicators are compared to the state and nation. The coastwide area is the sum of the seven counties fronting the Pacific Ocean.<sup>18</sup> The study boundaries and personal income component shares for each county in 2021 is shown in Appendix Figure B.1.

The economic and social indicator sources are listed in Chapter VI. Two sources warrant additional explanation.

- (1) Employment data is both from the U.S. Bureau of Labor Statistics (BLS) and the Oregon Employment Department. The latter source is the State's data for the BLS Quarterly Census of Employment and Wages program (commonly referred to as the ES-202 Program). The other identified and identifiable industry categories have large business representation along the Oregon Coast. However, when itemizing the subcategories by county, confidentiality rules (showing jobs and payroll when the numbers represent

fewer than three businesses) accompanying the ES-202 data come into play. It was necessary to interview the businesses to procure their declarations of job numbers or to use published information about the business. No interviewed business refused to reveal job numbers. Industry average wages were used to estimate payroll costs for those embargoed businesses.”

- (2) The American Community Survey (ACS) sourced data is portrayed as one year, but can be representative of a range of years. The range of years depends on the population size for the reported area. Larger population areas can be 1-year results and 3-year results. For many communities on the Oregon Coast, the ACS data year is from 5-year survey results. ACS data is drawn from a monthly survey of a sample of residents. Sampling size is a greater percentage of the population in smaller communities. The annual survey sampling rates for small communities are between 10-15 percent (U.S. Census Bureau 2014). Estimate variances are provided with results to better understand data accuracy. Despite the ACS estimating methods for a larger sampling rate over a longer period, estimates from small communities are still based on a small number of people and may not accurately reflect the community’s characteristics. In this report, we review the variances and will graduate up to a higher population area boundary if the data has high standard deviations. An example data statistic chosen to be graduated is poverty rate. Instead of showing differences at a city boundary level, we use the encompassing ZIP code boundary level.

### III. DRIVER INDUSTRIES ECONOMIC CONTRIBUTIONS

Six major industry categories were used to explain the sources of the net earnings component of total personal income for county residents: commercial fishing, agriculture, timber, travel tourism, "other identified," and "other identifiable" industries. There is another "not identified" industry category that is a residual calculation using total personal income less economic contribution from identified industries and less economic contributions from purchases afforded by investment income and transfer payments. It is assumed that all other goods and services industries economic contributions are the result of the net earnings basic industries, investments, and transfers categories.

Tracing the net earnings source of income shows that natural resource related industries such as commercial fishing, agriculture, and timber continue to be important. The contributions from these industries in 2012 and 2021 to Lincoln County's economy is shown on Table III.1. While important, the natural resource industries proportion has declined over this period. Tourism and other identifiable (marine sciences, higher education, research, public health, tribal services, etc.) proportions have increased during the period.

The economic contributions in all coastal counties economies is graphically shown on Figure III.1 and as absolute numbers on Appendix Table B.1. Fishing (including oyster culture) makes up as much as seven to eight percent of the total personal income in 2021 for areas such as Lincoln and Clatsop counties, respectively. Agriculture makes up as much as eight percent in Tillamook County. The timber industry contributes one to four percent of personal income in the coastal counties. Clatsop and Lincoln counties have pulp and paper mills, marine transportation sectors, and sizable ship building sectors. These identified sectors contribute up to 10 percent of total personal income to these counties. Visitor tourism is a significant contributor to coastal areas, contributing as much as 10 percent in Lincoln County and 13 percent of total personal income in Clatsop County. The not identified industry category is seven to 13 percent of total personal income in the coastal counties.

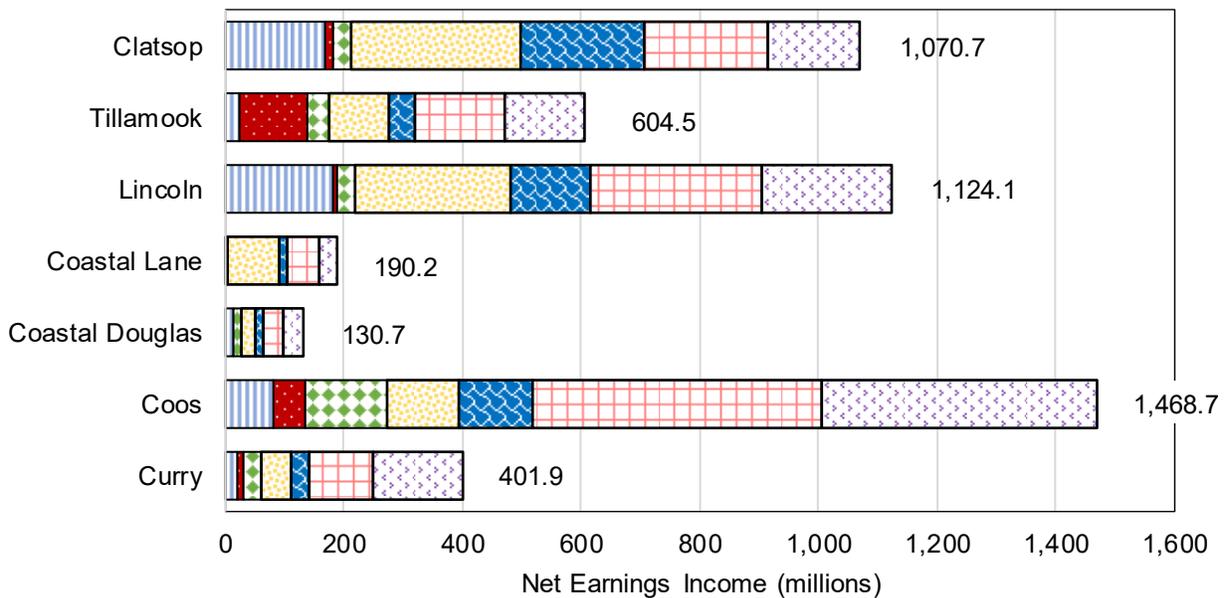
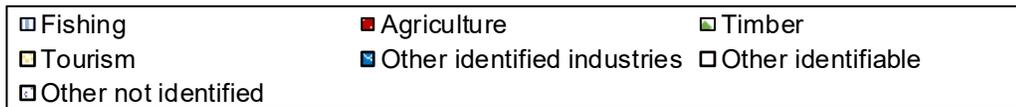
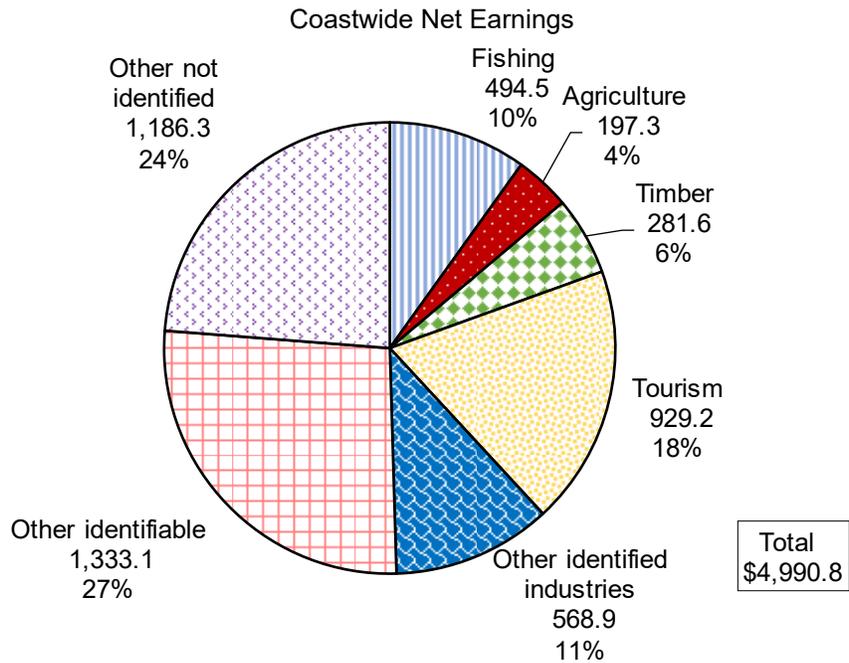
Table III.1  
Lincoln County Sources of Total Personal Income in 2012 and 2021

	2012		2021	
	Income	%	Income	%
Total Personal Income	1,985.8	100.0%	2,669.4	100.0%
1. Net Earnings	992.5	50.0%	1,124.1	42.1%
1.1. Identified industries	660.2	33.2%	906.3	34.0%
1.1.1. Commercial fishing	195.8	9.9%	182.8	6.8%
1.1.2. Agriculture	5.0	0.3%	7.1	0.3%
1.1.3. Timber	124.1	6.2%	29.9	1.1%
1.1.4. Travel tourism	159.6	8.0%	261.5	9.8%
1.1.5. Other identified industries	59.3	3.0%	135.8	5.1%
1.1.5.1. Paper and paperboard mills	56.5	2.8%	75.3	2.8%
1.1.5.2. Water transportation and marine cargo	0.1	0.0%	--	--
1.1.5.3. Ship building, fabrication, heavy manufacturing and construction	2.8	0.1%	57.6	2.2%
1.1.5.4. Mining			2.9	0.1%
1.1.6. Other identifiable (marine sciences, higher education, research, public health, tribal services, etc.)	116.3	5.9%	289.2	10.8%
1.2. Other not identified	332.3	16.7%	217.8	8.2%
2. Investments (dividend, interest, rent, 401k plan disbursements, etc.)	456.1	23.0%	525.4	19.7%
3. Transfers (Social Security, Medicare, income maintenance, education/training, veterans benefits, etc.)	537.2	27.1%	1,019.9	38.2%

Note: Personal income in millions of 2021 real dollars. Dashes can represent positive values, but are not sufficiently significant to show.

Source: Year 2012 from TRG (August 2014) and Year 2021 from (OCVA January 2024).

Figure III.1  
Economy Drivers in 2021



Note: The industry category proportions are of net earnings. This differs from the shares of total personal income.

Source: OCVA (January 2024).

## IV. SOCIAL INDICATORS

### A. Demographics

Knowing about people and society in an area and for groups provides insights into government management and policy needs. Knowing about demographic indicators also informs about market demand information for retail and service businesses. Comparing Lincoln County to the rest of the state and nation shows the particularities of the needs and business opportunities.

From 2000 through 2023, the population of Oregon has been growing faster than the population of the United States (Table IV.A.1). There has been overall growth in coastal counties, but at a slower pace than Oregon.<sup>19</sup> Lincoln County during the period grew 16 percent and Oregon grew 24 percent.<sup>20</sup>

Generally, coastal counties have an overall out-migration of young adults who leave the region to find education and employment opportunities (Figure IV.A.1). With these migration patterns alone, coastal areas would experience significant shifts in their demographic structure. However, this trend is confounded by in-migration patterns. The national population is "aging" with large population cohorts moving into middle and older age groups.

The people in the retirement age cohorts are moving to the Oregon Coast. The trend is the same for Oregon, but more so for most coastal counties. A snapshot in Year 2023 of Lincoln County and Oregon age cohorts is shown on Table IV.A.2. Lincoln County's aged 65 and up is 31 percent and Oregon's is 19 percent. Appendix Table C.1 shows retirement age populations for all coastal counties. Lincoln and Curry counties have the highest proportion of retirement age people in Year 2021.

Net migration (individuals moving out minus those moving into an area) is shown for the recent intercensal period on Table IV.A.2. The growth in population due to natural increases (births minus deaths) declined between 2010 and 2020. When looking at periods since 1950, the natural increase growth was steadily positive and then changed to negative between 1990 and 2000.

Migration patterns in an area can be linked to information about business formations. According to a recent Kauffman Indicators of Entrepreneurship report, new residents were nearly twice as likely to be entrepreneurs than existing residents (Looze October 2022).

Lincoln County, Oregon and the nation's education attainment profile is shown in Figure IV.A.2. Lincoln County has a higher proportion of high school diplomas than Oregon, but a lower proportion of college degrees. A region's educational attainment can show understandings about an area's hiring potential. A highly educated adult population suggests that the local labor force is likely well equipped to support innovative and technology-based industries that require advanced degrees. Lincoln County's education attainment statistics are somewhat confounded

by the presence of higher education facilities in that those employed tend not to be mobile in the labor market.

Table IV.A.1  
Population and Median Age Change 2000-2023 in Coast Counties, Oregon, and U.S.

	Population		Median Age	
	2023	Change 2000-2023	2023	Change 2000-2023
Coast counties				
Clatsop	41,343	16%	45.2	13%
Tillamook	27,471	13%	48.9	12%
Lincoln	50,632	14%	52.5	19%
Coastal Lane	17,781	142%	61.8	18%
Coastal Douglas	5,983	37%	56.6	21%
Coos	64,832	3%	48.6	13%
Curry	23,463	11%	57.2	17%
Coast	231,505	16%	51.0	15%
Oregon	4,238,714	24%	40.1	10%
U.S.	332,387,540	18%	38.7	10%

Note: Using [4] estimates on July 1, the coastal counties population growth from 2020 to 2023 was 6.4%. The State change during this period was 0.5%.

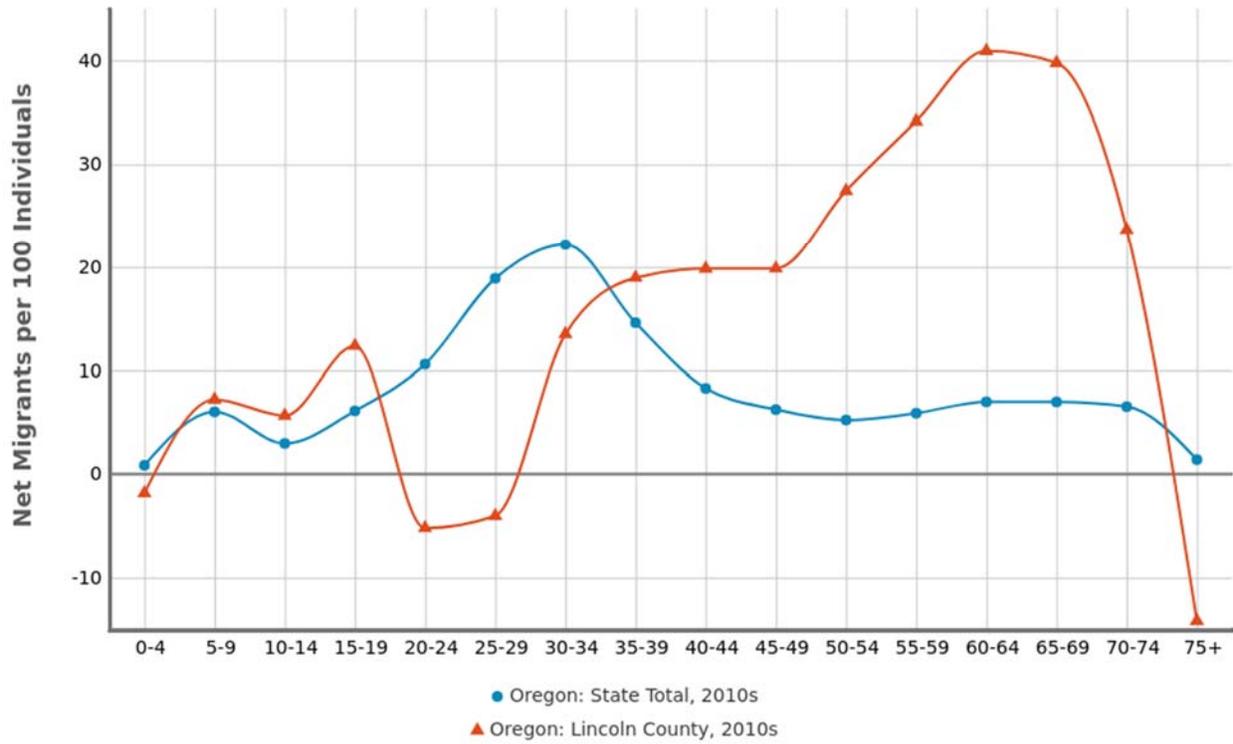
Sources: [1] and [2].

Table IV.A.2  
Population Age Characteristics and Components of Change in 2023 in Lincoln County

Population Characteristics	County	Oregon
Population	50,632	
Under 18	16.0%	20.2%
Age 18-64	52.9%	61.2%
65 and over	31.1%	18.6%
Median age	52.5	40.1
White alone	82.5%	
Components of population change		
Total change, 2010-2020	2,271	
Net migration	5,583	
Natural increase	-3,312	

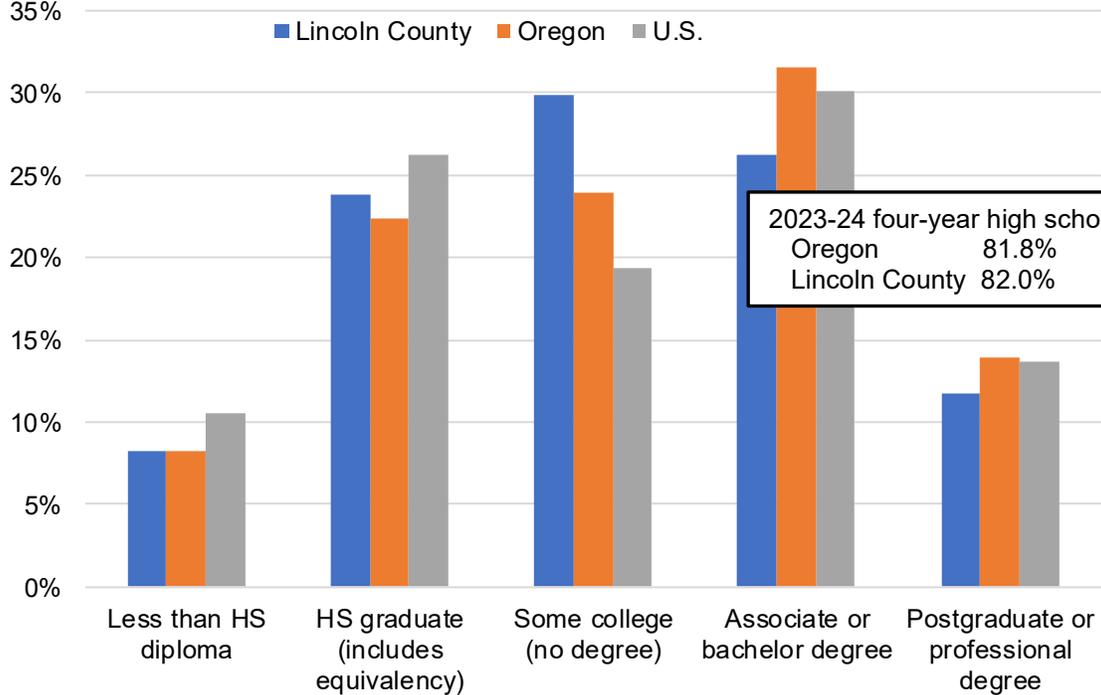
Sources: [2] and OCVA (January 2024).

Figure IV.A.1  
Net Migration by Age: Lincoln County and Oregon



Source: [6].

Figure IV.A.2  
Education Attainment for Working Aged Adults (25 and Older) in Year 2023



Sources: [2] and [5].

## B. Labor Force

Lincoln County's civilian labor force statistics include employment numbers as well as those unemployed and looking for work, excluding military personnel and those in institutions like prisons. Lincoln County does have a deployment of Coast Guard personnel which counts as military, but the numbers are insignificant compared to private and government employment. Analyzing employment and unemployment trends provides immediate insights into the economy status. Finding trends and comparing the changes to surrounding regions signals that an economy is shrinking or expanding.

A snapshot of Lincoln County's civilian labor force in 2023 is shown in Table IV.B.1. Trends over a 20-year period is shown in Figure IV.B.1. Total labor supply (includes farm and other proprietorship data) was 20,738. Government (federal, state and local) comprises almost 20 percent of labor demand. This compares to 14 percent in Oregon and the nation. The higher percentage is reflective of not only city, county, port and school district jobs, but also the particular employment at NOAA MOC-P, Hatfield Marine Science Center (HMSC) and the Oregon Coastal Community College.

Table IV.B.1 shows a much higher proportion of self-employment in Lincoln County at 12 percent compared to seven percent in Oregon and six percent nationwide. Most jobs in the harvesting side of the fishing industry are proprietorships.

The flip side of employment is unemployment. Lincoln County's unemployment rate compared to Oregon and the nation over the last 20 years is shown on Figure IV.B.2. The trend line shows the high seasonal variation pattern caused by several industry jobs being associated with summer time weather (such as tourism and agriculture). There are noted spikes in the rate during the Great Recession (2008-2009) and COVID-19 pandemic (2020-2022) years. The rate up to May 2024 at all levels has returned to pre-pandemic years. In the past, coastal counties were much more vulnerable to recessions than the State and U.S. Coastal counties experienced worse unemployment. In the last fifteen years, Lincoln and other coastal counties have closer unemployment rates to those in the rest of the State and U.S.

Figure IV.B.3 has covered employment overlaid on covered employment wage totals. While employment numbers modestly increased following the Great Recession years (2008-2009) and COVID-19 pandemic years (2020-2022), the rate of increase in inflation adjusted covered wages has been even higher. This indicates that a growth in employment in Lincoln County has been in higher paying occupations. State and federal employment, including the MOC-P relocated jobs, and healthcare jobs are significant contributor to this positive trend.

As noted in Chapter III when discussing personal income accruing to households and individuals within Lincoln County, there is a relative large job commuting pattern to outside counties. Figure IV.B.4 shows the inflow and outflow in 2022. The employees that work and reside in Lincoln County is 66 percent of all those employed in Lincoln County. Employees that work in the County but reside elsewhere are 34 percent. Of all those residing and employed in Lincoln

County, 47 percent work outside the County. The income for those working outside the County is included in the "other not identified" industry category in the Chapter III discussed economic base modeling.

One approach to economic development efforts is to use cluster analysis to identify groups of industries. One industry cluster relevant to Lincoln County is referenced as the "blue economy" or sometimes the "ocean economy." This cluster is a geographic concentration of marine, maritime, and freshwater-focused businesses, supported by universities and governments, that collaborate to foster innovation and sustainable economic growth. The economic development cluster approach is to take advantage of new market opportunities for new businesses and organizations and assist existing dependent operations to adapt. The concentration of effort is to pivot away from unsustainable past practices and launch the industries of the future. Conathan (2021) notes that one economic development tool that has some prominence and is beginning to show positive results is hubs of operation and entrepreneurship. "While the mythology of successful economic development often centers around individual genius creators, there is an emerging school of thought, and increasingly of practice, that recognizes the value of multiple innovators with similar, often complimentary ideas, who operate in close geographical and ideological proximity and as a result end up creating a whole that is greater than the sum of its individual parts."

Several local and state studies have provided blue economy cluster analysis results. The EDALC has taken a lead in participating in a statewide effort to establish several blue economy hubs along the Oregon Coast. The Newport, Oregon area is one of the hubs. The program is titled O2IH and was launched in 2022 with a grant from the U.S. Economic Development Administration. EDALC launched a website that describes businesses and organizations within the County that fall within a blue economy definition.<sup>21</sup> The Oregon Legislature (Oregon Laws 2022, Chapter 110, Section 296) directed the Oregon Business Development Department (Business Oregon) to conduct several comprehensive market analyses of emerging industry sectors including the ocean resources and blue economy sector. Business Oregon engaged Eastern Research Group, Inc. (ERG) to conduct the analysis. The ERG presented their report to the Legislature in March 2023.<sup>22</sup> The analysis reveals indirect and direct economic impacts of the sector and policies and actions that could be taken to increase the competitiveness and support the growth of the sector.

The ERG used NOAA's Economics National Ocean Watch (ENOW) definition of an ocean economy. ENOW data is from business reporting of covered employment associated with NAICS codes. The blue economy includes six industry groupings. The ENOW reported employment data for the groupings for Lincoln County and Oregon in 2021 is shown on Table IV.B.2. Confidentiality rules prevent showing all but the Tourism and Recreation group at the County level. ENOW data shows the Tourism and Recreation group is 85 percent of all blue economy employment in Lincoln County. At the state level, the groupings proportions are: (1) Living Resources (9 percent), (2) Marine Construction (1 percent), (3) Marine Transportation (28 percent), (4) Offshore Mineral Extraction (1 percent), (5) Ship/Boat Building (4 percent), and (6) Tourism/Recreation (57 percent).

Oregon's blue economy generated an estimated GDP of \$3.1 billion in 2019, making up just over one percent of Oregon's total GDP. The greatest local contribution was from Multnomah County at 53 percent of the statewide blue economy GDP. Measured by employment, Clatsop County has the highest blue economy representation at 31 percent in 2019. The blue economy generated 27 percent of Lincoln County's employment in 2019. In regard to statewide trends, the marine transportation and tourism/recreation sectors have both experienced significant increases in group employment between 2005 and 2019.

Out of the 30 coastal states in the United States, Oregon's ocean economy ranks 22nd in terms of the value of its ocean-dependent GDP in 2019. For the Pacific Ocean facing states, about 2.2 percent of Oregon's employed workforce is employed in the blue economy, compared to about 14.3 percent in Alaska, about 3.4 percent in California, and about 4.2 percent in Washington.

The ERG described an opportunity assessment and discussed potential initiatives to enhance growth in the blue economy. Examples were taken from other states and countries to punctuate what could be done. The highlighted opportunities have the following categories. Each category had specific descriptions of programs to address the opportunities.

- Workforce and Training
- Research, Innovation, and Demonstration
- Market and Trade Development
- Community Infrastructure and/or Site Development
- Operational Improvements and Capital
- Social and Economic Equity
- Supplier Networks
- Emerging Blue Economy Opportunities

Specific investment themes were outlined: (a) coordinate efforts at the state level; (b) invest in community infrastructure; and, (c) strengthen investments in education and training.

Table IV.B.1  
U.S., Oregon, and Lincoln County Civilian Labor Force and Class of Worker in 2023

Lincoln County Civilian Labor Force in 2023

	Lincoln County		Oregon		U.S.
<b>Labor Supply</b>					
Unemployment	920	4.4%	3.8%		3.6%
Employment	<u>19,818</u>	<u>95.6%</u>	<u>96.2%</u>		<u>96.4%</u>
Total	20,738	100.0%	100.0%		100.0%
<b>Labor Demand</b>					
Private industry	14,855	80.1%	85.6%		85.7%
Government					
Federal	318	1.7%	1.4%		1.9%
State	328	1.8%	2.3%		3.0%
Local	<u>3,047</u>	<u>16.4%</u>	<u>10.6%</u>		<u>9.3%</u>
Total	<u>3,693</u>	<u>19.9%</u>	<u>14.4%</u>		<u>14.3%</u>
Total	18,548	100.0%	100.0%		100.0%

Note: Labor supply includes farm and other proprietorship employment data. Labor demand is non-farm "covered" employment data. Neither category includes all unpaid workers which can significantly contribute to the economy. Examples are care work, family support, and volunteerism.

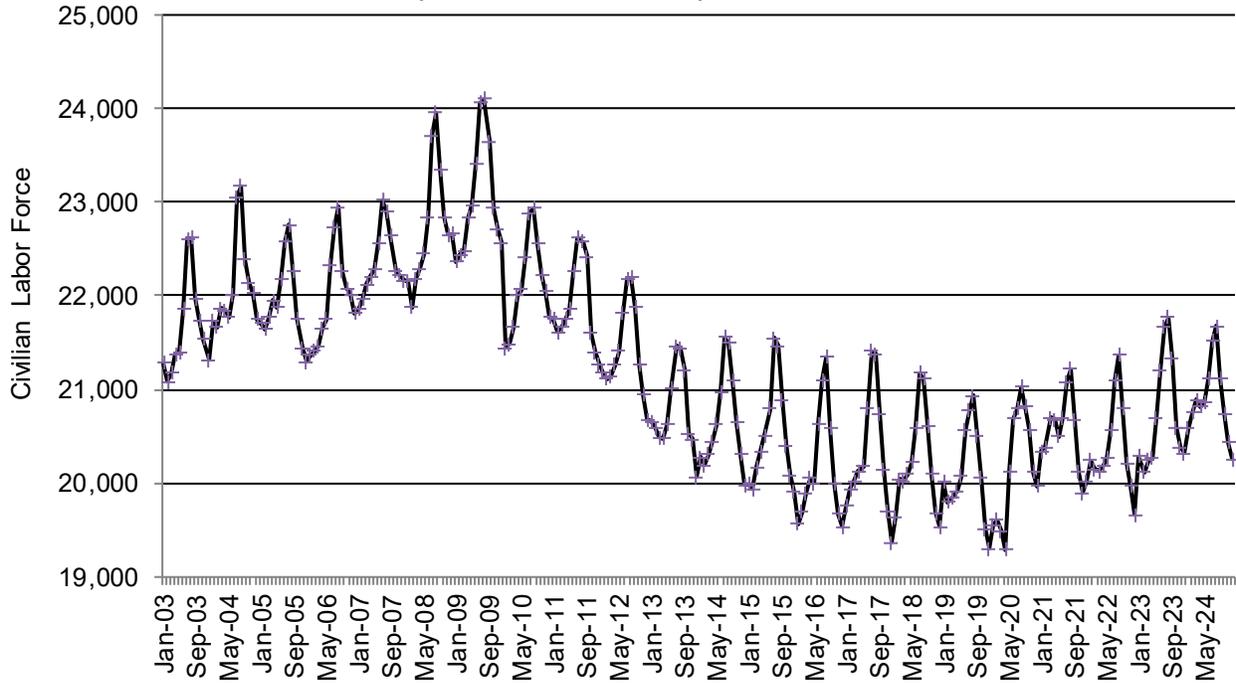
Source: Labor force statistics from [8].

Lincoln County Class of Worker

	Lincoln County		Oregon		U.S.
Civilian employed population 16 years and up	19,707	100.0%	100.0%		100.0%
Private wage and salary workers	13,998	71.0%	78.4%		79.4%
Government workers	3,276	16.6%	14.5%		14.4%
Self-employed in own not incorporated business workers	2,381	12.1%	6.9%		6.0%
Unpaid family workers	52	0.3%	0.2%		0.2%

Source: [2] ending in 2023.

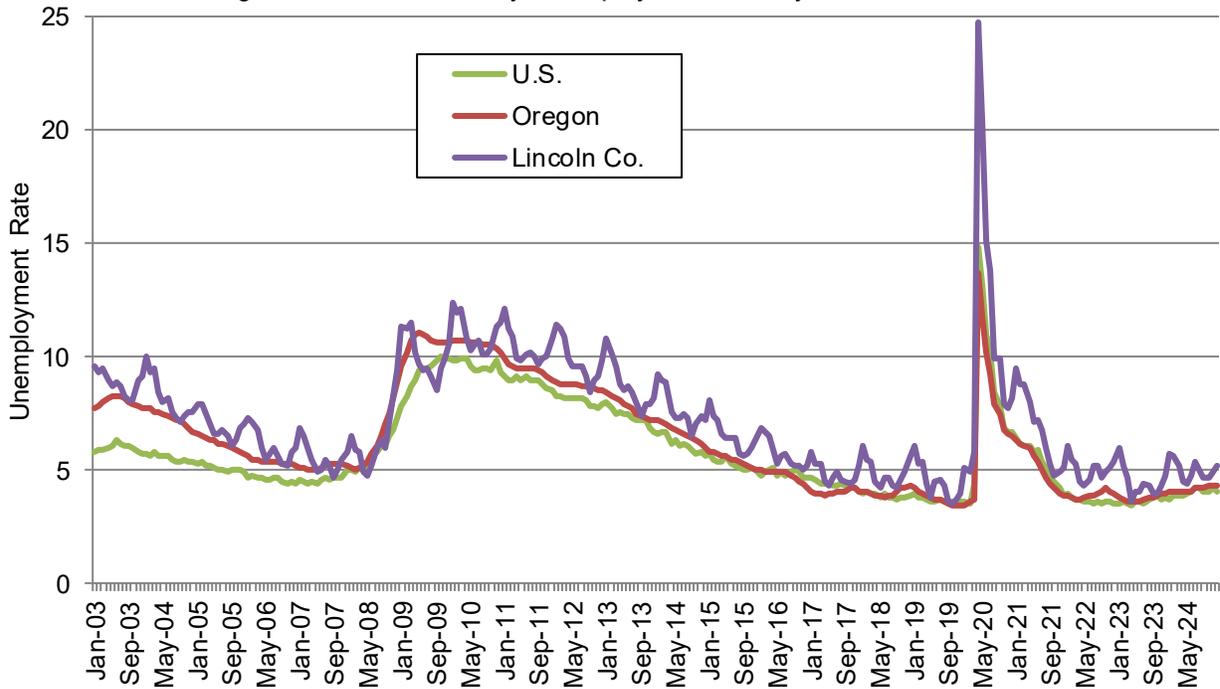
Figure IV.B.1  
Lincoln County Civilian Labor Force by Month in 2003 to 2024



Note: Not seasonally adjusted.

Source: [8].

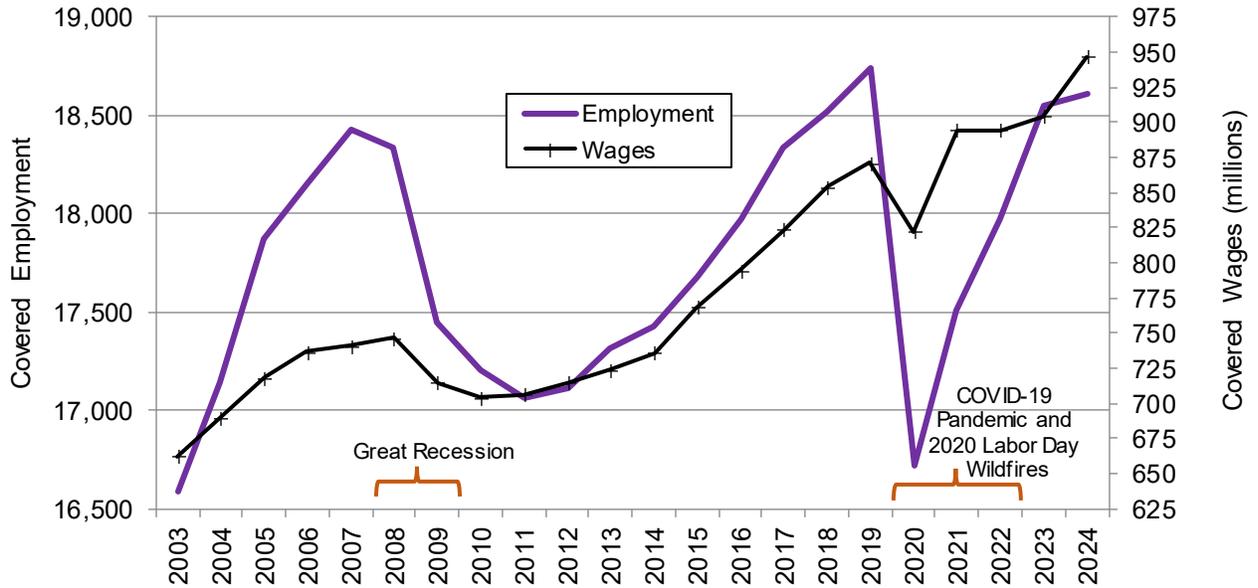
Figure IV.B.2  
U.S., Oregon, and Lincoln County Unemployment Rate by Month in 2003 to 2024



Note: Seasonally adjusted, except for Lincoln County.

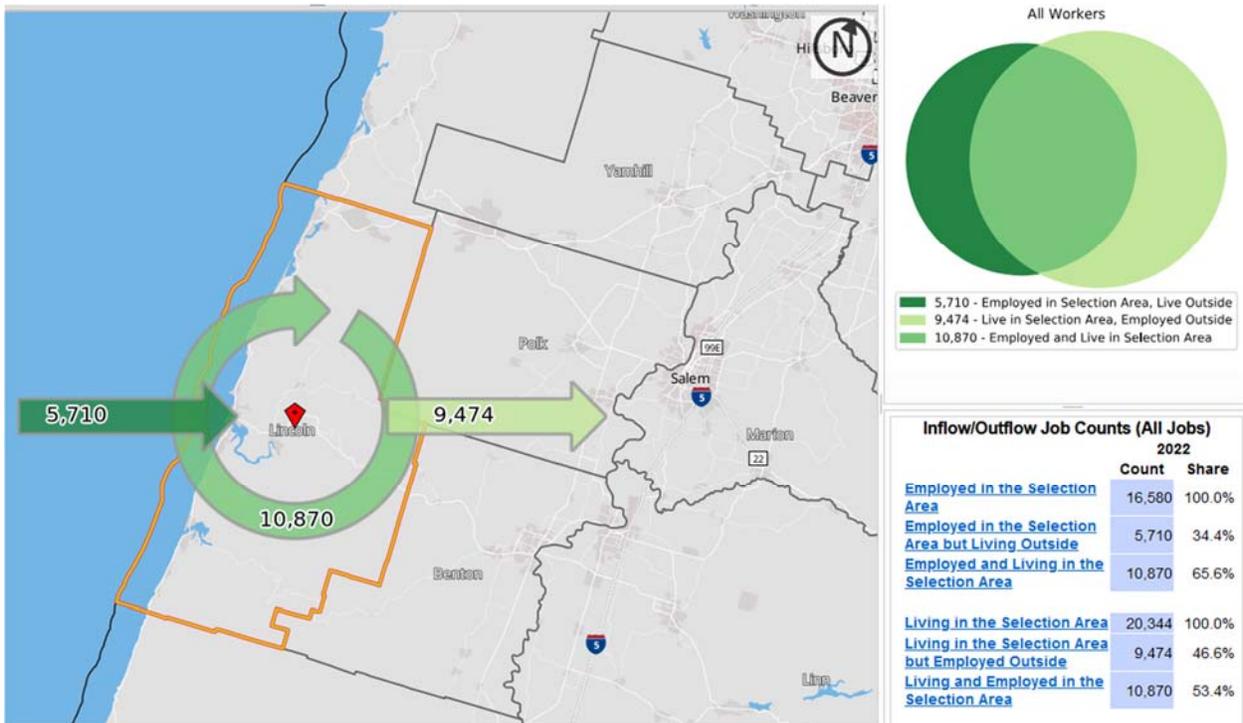
Source: [8].

Figure IV.B.3  
Lincoln County Annual Covered Employment and Wages in 2003 to 2024



Note: Covered wages are adjusted to 2023 dollars.  
Source: [8].

Figure IV.B.4  
Lincoln County Employment Inflow/Outflow for 2022



Source: [7].

Table IV.B.2  
Lincoln County and Oregon Blue Economy Employment in 2021

	Self-Employed Workers		Total Self-Employed and Employees			
	Lincoln County	Oregon	Lincoln County	Oregon		
Total for ocean economy selected industries	357	100.0%	100.0%	4,932	100.0%	100.0%
Living resources: 1141,31171,445250	275	77.0%	60.0%	614	12.5%	8.5%
Marine construction: 237990			1.9%			1.3%
Marine transportation: 483,486,488,4931	14	3.9%	12.2%			27.5%
Offshore minerals: 2111,2123,21311,541360			2.6%			1.4%
Ship and boat building: 336			0.8%			3.9%
Tourism and recreation: 441222,487,7211,72121,722511,722513	63	17.6%	22.5%	4,184	84.8%	57.4%

- Notes: 1. Blanks are for data that is withheld.  
2. Self-employed are businesses (those without paid employees) that include fishers, boat captains, engineers, innkeepers and the like.  
3. Marine related business establishments represent about 18 percent of all Lincoln County establishments.  
4. Selected industries NAICS codes are shown.

1141	fishing	4931	warehousing	487	sightseeing
31171	seafood	2111	oil/gas extraction		transportation
	prep/packaging	2123	nonmetallic mining	7211	hotels
445250	fish markets	21311	mining support	72121	RV parks
237990	heavy construction	541360	geophysical	722511	full-service
483	water transportation		survey/mapping		restaurants
486	pipeline	336	transportation equip.	722513	limited-service
	transportation		manuf.		restaurants
488	transportation support	441222	boat dealers		

Source: [16].

### C. Households and Individual Income

The three main components of personal income in Lincoln County, Oregon, and U.S. in 2003 and 2023 are shown in Figure IV.C.1. Lincoln County's total personal income increased from \$1.9 billion to \$3.0 billion in real 2023 dollars over the 20-year period. A significant income trend in the County over the last 20-year period is a decrease in the net earnings component (i.e., employee compensation and proprietor income) of total personal income (54 percent to 45 percent) and the dramatic increase in transfer payments (23 percent to 31 percent). The proportion of investment income held steady. The net earnings decrease proportion and transfers increase was mirrored coastwide, and to a lesser extent, in Oregon.<sup>23,24</sup>

The increase in transfers is mostly a function of the increase in retirees collecting age related transfer payments. Almost two-thirds of transfer payments are from age-related programs such as Social Security. The falling share of net earnings means a lot of the spending that occurs within Lincoln County is not tied to salaries and wages from local businesses or industries.

There are geographical considerations for income distribution within the County (Appendix Figure A.1). The highest household median income in 2023 was in Yachats at \$71,200 and the lowest was Waldport at \$57,700. The County median household income was \$61,314 compared to the State's \$80,426 in 2023. The family poverty rate also varies considerably. (Poverty levels are set by the federal government; example family size of two adults and two children is about 50 percent of the median family income.) Figure IV.C.3 graphically shows Lincoln County poverty rates by major ZIP Code areas associated with cities in 2023.<sup>25</sup> The rate numbers are shown in Appendix Figure A.1. The number of persons living below the poverty level in 2023 was highest in Toledo at 21.6 percent and the lowest was Yachats at 7.8 percent. The County average was 15.7 percent in 2023, compared to the State's 11.9 percent.

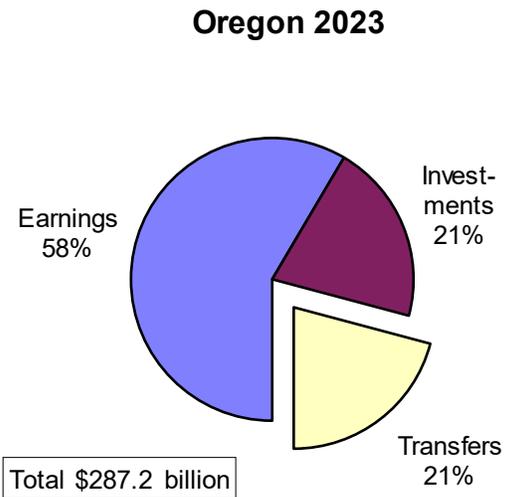
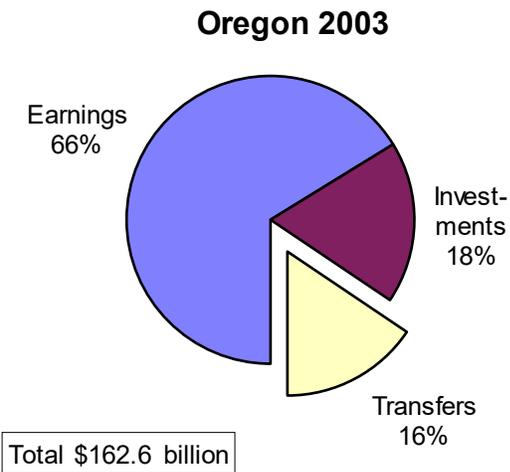
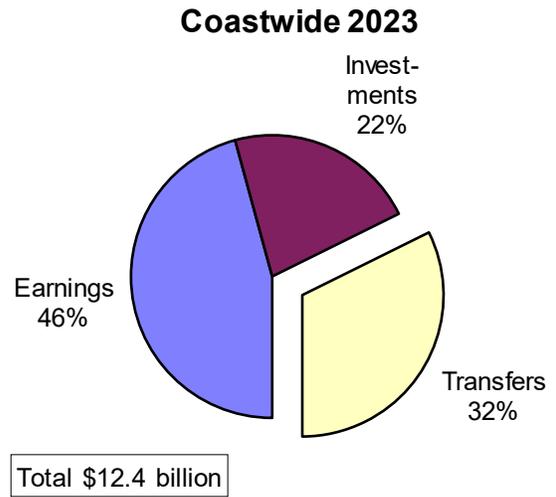
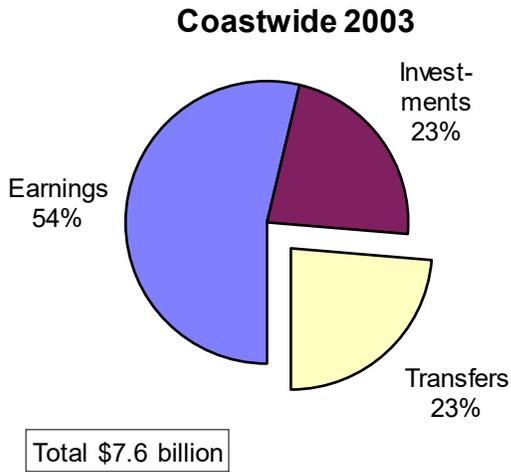
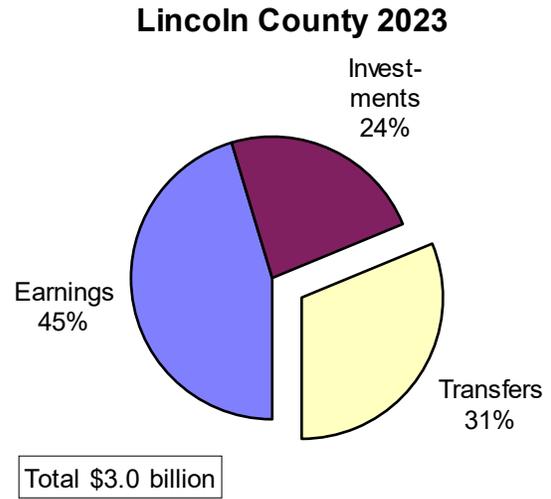
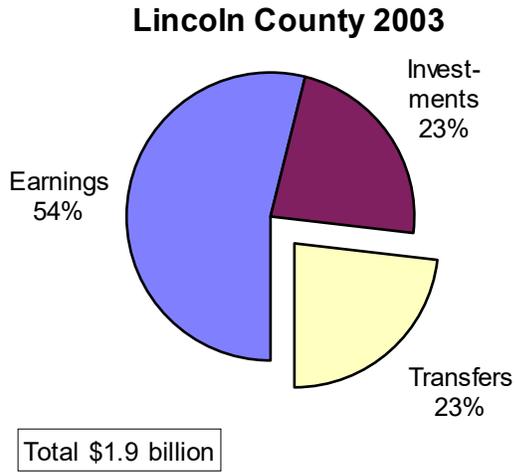
Per capita income is one of the most telling indicators of economic well-being. It is the total of income from all sources - wages, interest earnings, dividends, business profits, unemployment compensation, and retirement - divided by the total population. The per capita income in Lincoln County and the other coastal counties is still well below per capita income at the State or national level. The Lincoln County per capita income in 2023 is \$51,715 and Oregon's is \$67,838 (Appendix Figure A.1). Figure IV.C.2 shows per capita income for cities in Lincoln County. Lowest are Siletz and Toledo and highest is Yachats in 2023.

Average wage and salaries received in covered jobs is less along the Coast and in Oregon.<sup>26</sup> Measured in real 2023 dollars, the average Lincoln County worker earned about \$48,752; the average Oregon worker earned \$68,283 (Appendix Figure A.1). Annual covered employment and wage trends are shown in Figure IV.B.3. The Great Recession and COVID-19 pandemic years downturns are prominent features on the figure. Both employment and wages are on the upswing since 2020.

Income inequality statistics can be misleading when averages are used as indicators. A few households in very high income brackets can mask the effects of many households in lower income brackets. The income brackets for Lincoln County, Oregon and the nation are shown in Table IV.C.1. Lincoln County has far fewer households in the highest income brackets than the State.

People in the lower income brackets face a housing problem along much of the Coast. Many potential workers are unable to secure affordable housing as rising demand for coastal property has priced homes and rentals out of their reach. This lack of workforce housing makes it more difficult for employers to attract and retain workers in occupations such as trade and service workers. This is especially true for businesses oriented towards the tourism industry.

Figure IV.C.1  
 Personal Income Source Shares in 2003 and 2023



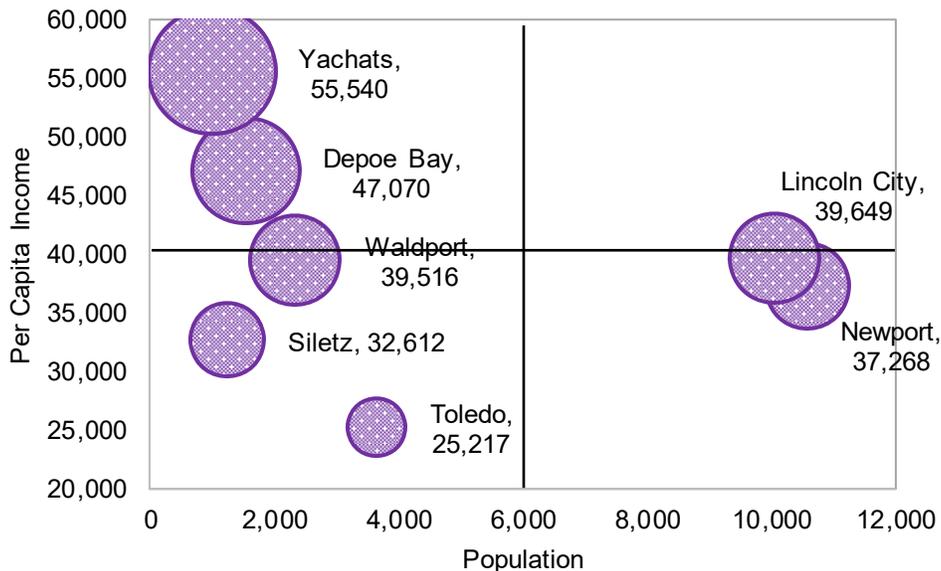
Note: Personal income in billions adjusted to 2023 dollars.  
 Source: [13].

Table IV.C.1  
U.S., Oregon, and Lincoln County Personal Income Distribution in 2023

	U.S.		Oregon		Lincoln County		
Total households	127,482,865	100.0%	1,701,548	100.0%	22,829	100.0%	
Less than \$10,000	6,214,601	4.9%	74,987	4.4%	1,171	5.1%	Low
\$10,000 to \$14,999	4,531,954	3.6%	57,467	3.4%	1,103	4.8%	
\$15,000 to \$24,999	8,370,687	6.6%	106,825	6.3%	2,023	8.9%	
\$25,000 to \$34,999	8,726,561	6.8%	108,826	6.4%	2,205	9.7%	Average
\$35,000 to \$49,999	13,308,310	10.4%	178,543	10.5%	2,444	10.7%	
\$50,000 to \$74,999	20,077,013	15.7%	270,646	15.9%	4,942	21.6%	
\$75,000 to \$99,999	16,202,717	12.7%	225,597	13.3%	2,788	12.2%	High
\$100,000 to \$149,999	22,198,277	17.4%	313,993	18.5%	3,430	15.0%	
\$150,000 to \$199,999	11,843,136	9.3%	163,392	9.6%	1,292	5.7%	
\$200,000 or more	16,009,609	12.6%	201,272	11.8%	1,431	6.3%	
Median household income (dollars)	\$78,538		\$80,426		\$61,314		
Mean household income (dollars)	\$110,491		\$108,321		\$83,483		
Poverty rate		12.4%		11.9%		15.7%	

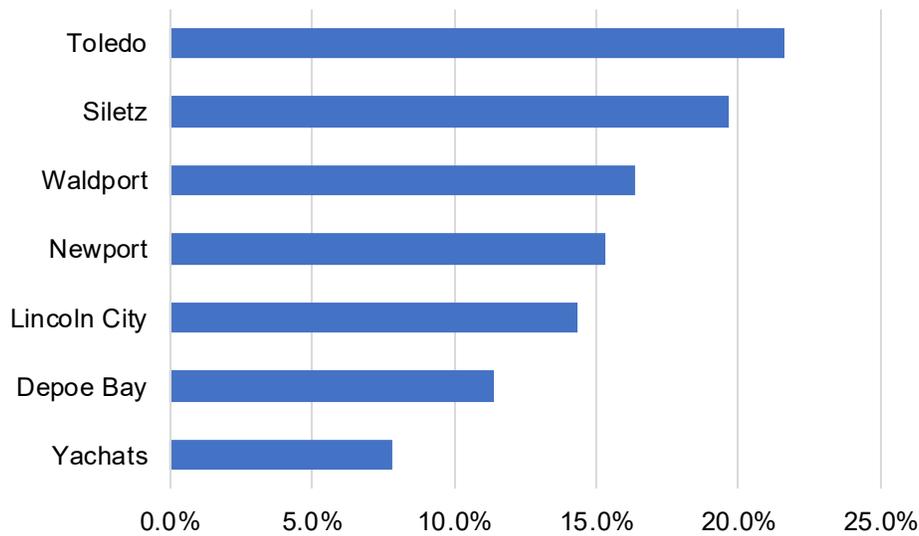
Note: Poverty rate is the population living below a certain income level. The level is determined by a set of thresholds based on family size and composition.  
Source: [2].

Figure IV.C.2  
Cities in Lincoln County Per Capita Income in Year 2023



Notes: 1. Cities shown are the largest in Lincoln County by population.  
2. Bubble size corresponds to relative per capita income.  
Source: City population from [4], per capita income from [2] ending in 2023.

Figure IV.C.3  
Lincoln County Poverty Rates by Major ZIP Code Groups in Year 2023



Notes: The rate references areas defined by ZIP code boundaries that encompass the shown cities.  
Source: [2].

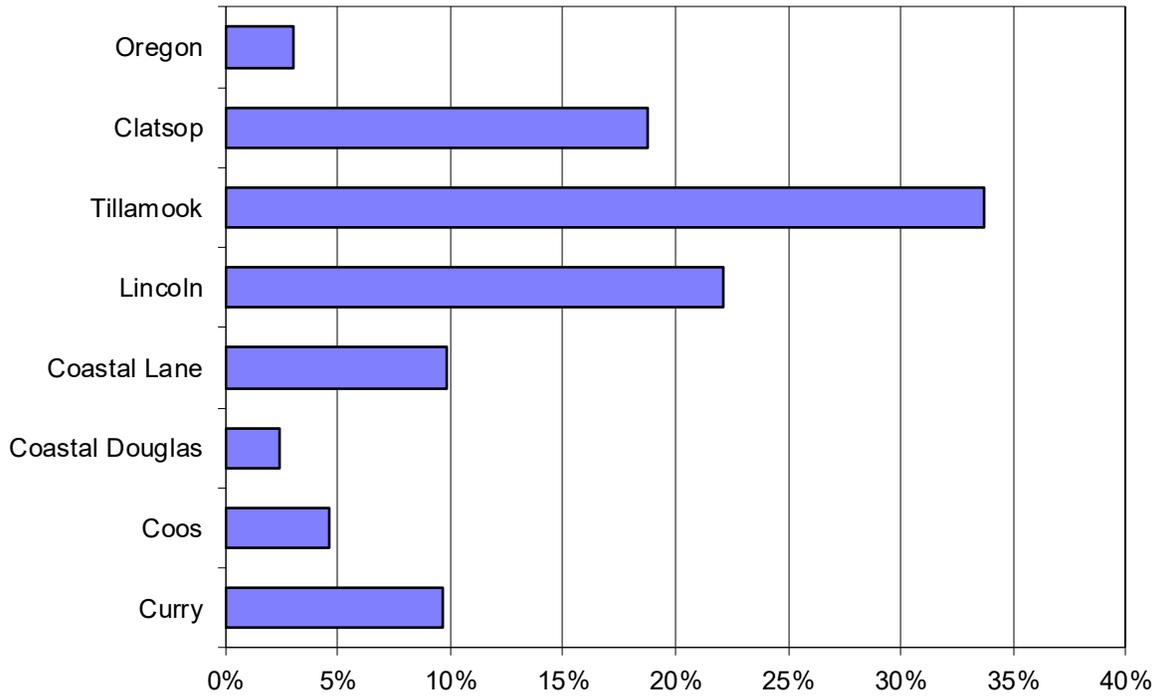
#### D. Housing Inventory

The usual statistic to measure housing availability is misleading for the Oregon Coast. Most counties' overall vacancy rates are substantially higher than the State's. This is because the Census defined total vacancy rate includes vacant units market ready and vacant units which serve as a second home. Coastal counties' housing stock includes a much higher proportion of second homes than the State (Figure IV.D.1). Tillamook County has the highest percentage of second homes of all the coastal counties.

The median value of owner occupied homes in Lincoln County in 2023 is less (\$387,700) than the State (\$454,200). But, the residential assessed value per capita is much higher (\$119,810 versus \$60,913). This demonstrates the presence of higher-valued second homes on the Coast than in the rest of the State.

The household debt-to-income ratio is shown on Figure IV.D.2 for Lincoln County, Coast, Oregon. The County (1.90 in 2024) has consistently been much higher than Oregon (1.60 in 2024) over the last 20-years. The relatively high debt-to-income ratio is concern when considering economic resilience. Households would struggle to meet housing costs and have less disposable income. This suppresses local economies, as depressed purchases of goods and services can have multiplier effects throughout the economy.

Figure IV.D.1  
Second Homes as a Percent of Total Housing Units for Oregon and Coastal Counties in 2023

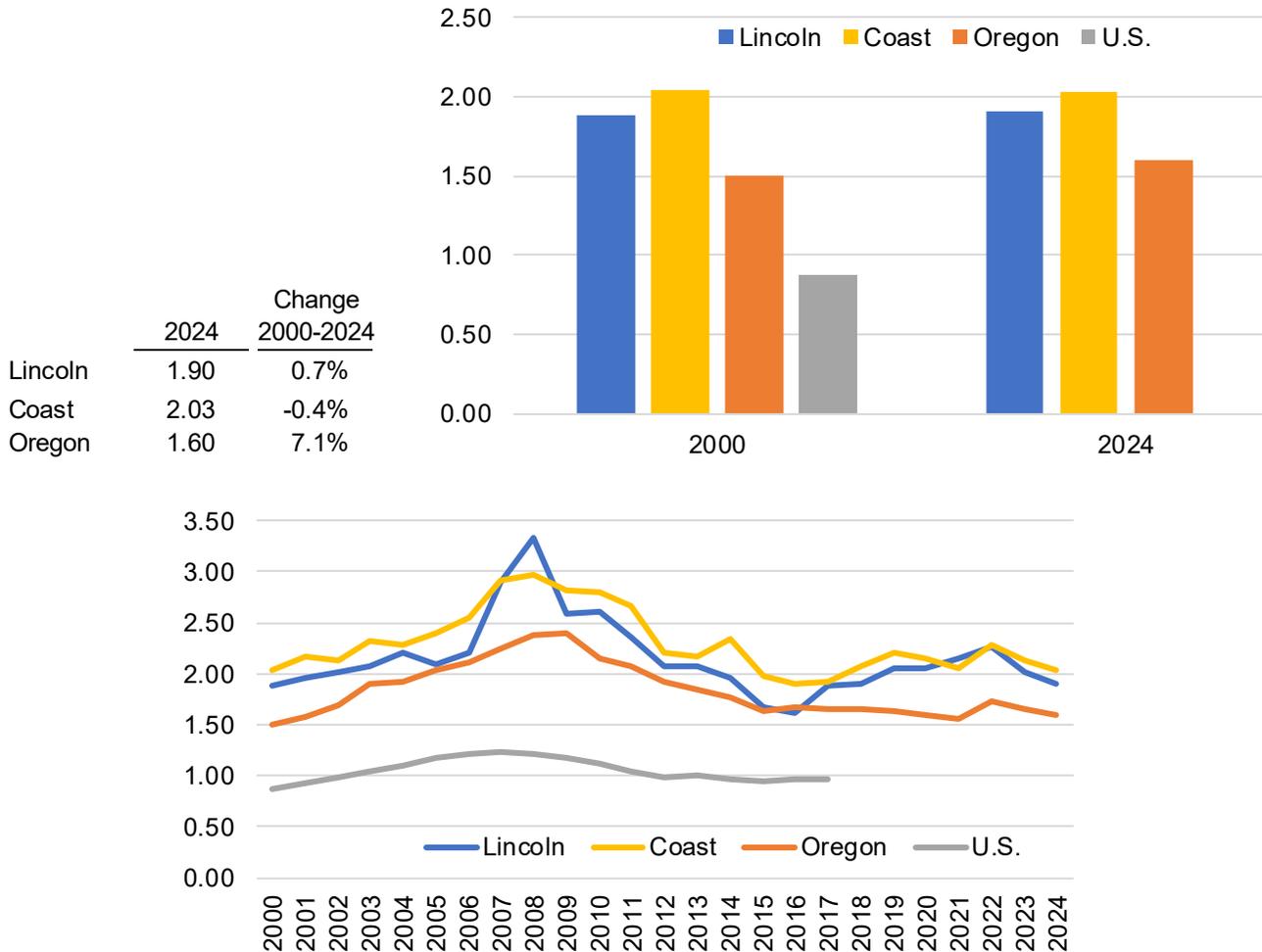


Note: Census defined housing units that are vacant include those that are market ready for sale and units which are intended to be used for certain seasons or for weekends or other occasional use (such as for seasonal workers) during the year.

Source: [2].

Figure IV.D.2

U.S., Oregon, Coastal Counties, and Lincoln County Household Debt-to-Income Ratio in 2000 to 2024



Note: Ratio is an area's aggregate debt reported by credit agencies divided by total disposable income reported by BLS. The ratios do not include student loan debt. Coastal counties average is for five whole counties weighted by population.

Source: [10].

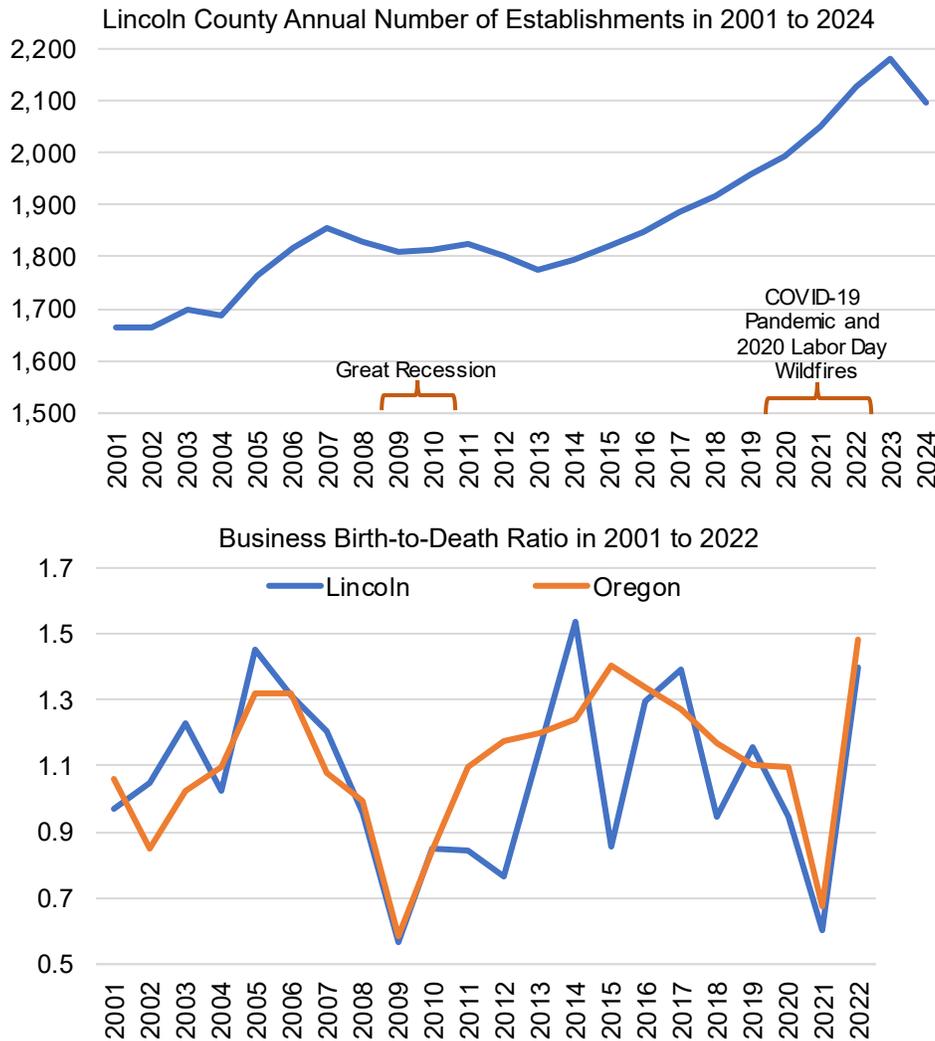
### E. Business Formation

An area's business establishment counts and business birth/closing employment trends can be an indicator of the economy's status. County establishment net numbers increased from 2013 through 2023 reaching 2,180 then slightly declined to 2,097 in Year 2024 (top of Figure IV.E.1). Measured by the number of employees for business count changes, the ratio of birth-to-death shows negative growth (i.e. the ratio is less than one) for beginnings of the Great Recession (2008) and COVID-19 (2020) (bottom of Figure IV.E.1). In each case there was positive growth starting 2013 and 2022, respectively.

Simply looking at business formations, there has been increasing numbers since 2013 through 2024 (top of Figure IV.E.2). The year-to-year percent change in Lincoln County's formation starting 2006 is compared to the Coast, Oregon, and the nation (bottom of Figure IV.E.2). Lincoln County as well as all coastal counties generally tracked with the larger geographic areas. A closer look at the graph shows Lincoln County and all coastal counties lags Oregon and the nation's percent change by about one year.

The presented data is a glimpse of business formation history, however economic development efforts need forward looking at the assistance requirements for startups and entrepreneurship. Beyond considerations for operational costs and sales to target markets for the business products, startup decisions to locate in Lincoln County will look to factors such as quality-of-life for owners and workers along with labor force mobility capacity, broadband presence,<sup>27</sup> education and training accessibility, commercial and industrial land availability,<sup>28</sup> transportation links and tax requirements. Potential worker talent will also be concerned with housing cost and childcare availability and cost. Unless costs are reasonable, attracting employees may be difficult.<sup>29</sup> Sometimes job possibilities for spouses becomes a relocation decision factor. Vlachou and Iakovidou (2015) has a literature search and more discussion of the location factors and business attraction challenges.

Figure IV.E.1  
Lincoln County and Oregon Business Birth-to-Death Ratio in 2001 to 2022

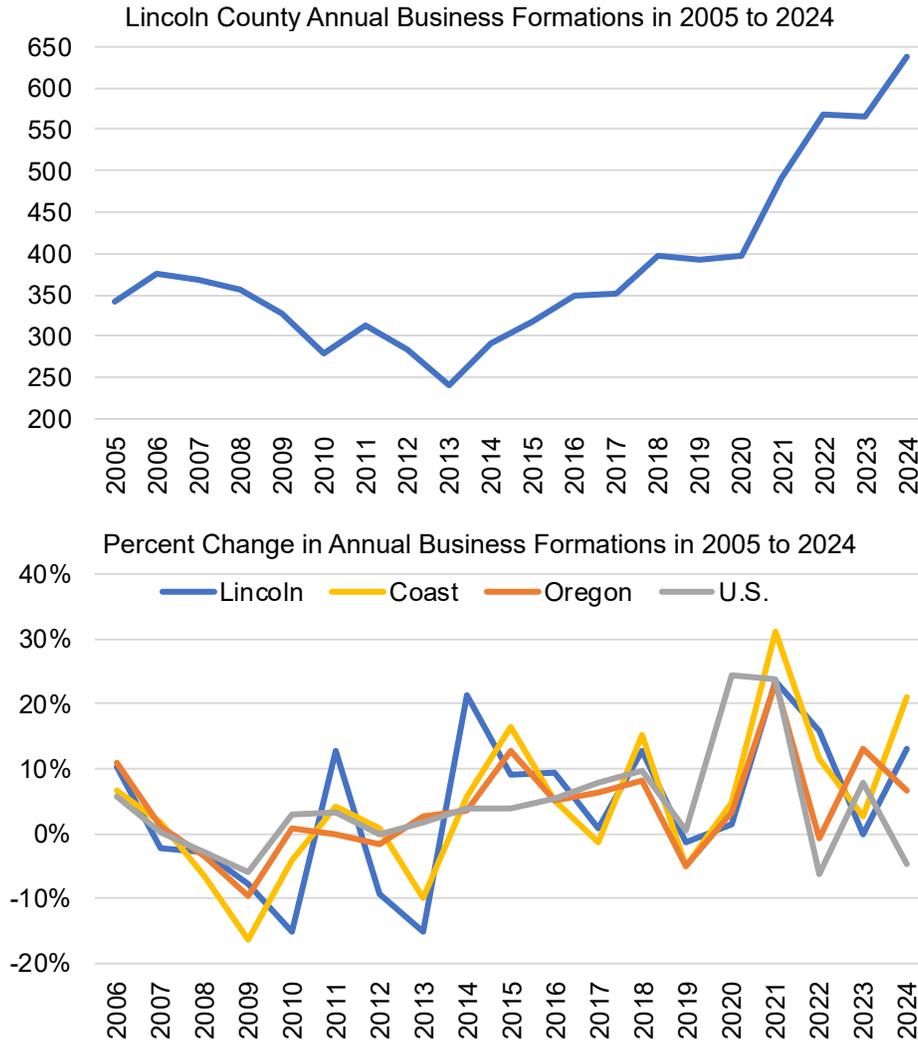


Note: Annual business births (deaths) measured by jobs created (lost) during last 12 months from expanding (contracting) and opening (closing).

Source: [8] and [11].

Figure IV.E.2

U.S., Oregon, Coastal Counties, and Lincoln County Business Formation Trends in 2005 to 2024



Note: Business formations are counts of applications for EIS numbers. Coastal counties average is for sum of five whole counties, exclusive of coastal Lane and Douglas counties.

Source: [11].

#### F. Retiree Purchasing Power

Retirement income in coastal counties is related to income earned in earlier years. It is either present day income of residents electing to stay during their retirement years or it is income that is transferred to the coastal areas by retiree aged people moving to the Coast. The income origin can be from investments, transfer payments, or other drawdowns on accumulated wealth. For estimating purposes, it is assumed that all retirement related income is within the BEA personal income components of investments and transfer payments. This can be

considered an over simplification as households comprised of non-retirement aged people also have some income from the BEA component.

The defined retiree effect is calculated to be the investment income and transfer payments proportion over and above the U.S. average. The retiree effect becomes a new portion of what was excess of the U.S. average portion of personal income. It is called potential purchasing in Table IV.F.1 and Figure IV.F.1 because not enough is known about how much of receipts are saved and the spending patterns on the Oregon Coast for the retiree demographic cohort. The definition for the local retiree effect in Lincoln County is 16 percent and ranges from eight percent for Clatsop County to 24 percent for Curry County.

The in-migration of retirees has helped increase total personal income in coastal counties. The in-migration and the growth of income from retirement programs represents a major and increasing source of purchasing power in many coastal areas. Coastal areas that capture an increasing share of the retirement related local spending can further economic development and promote employment stability.

Residents in smaller communities do not spend all of their income in these communities. They are likely to travel to other, larger areas for some purchases. This means a certain percent of spending for personal need items, health care, transportation, entertainment, etc. can be assumed to take place within local economies by retirees.

Additional research about consumption patterns in local coastal areas as well as demand for local services by age and income groups is needed to provide information on business and local government fiscal impacts for this growing population cohort.<sup>30</sup> For economic development policy in coastal communities, the comparison should be made between the benefits of attracting this cohort with the overall cost in public services, changes to land use demands, and other impacts.

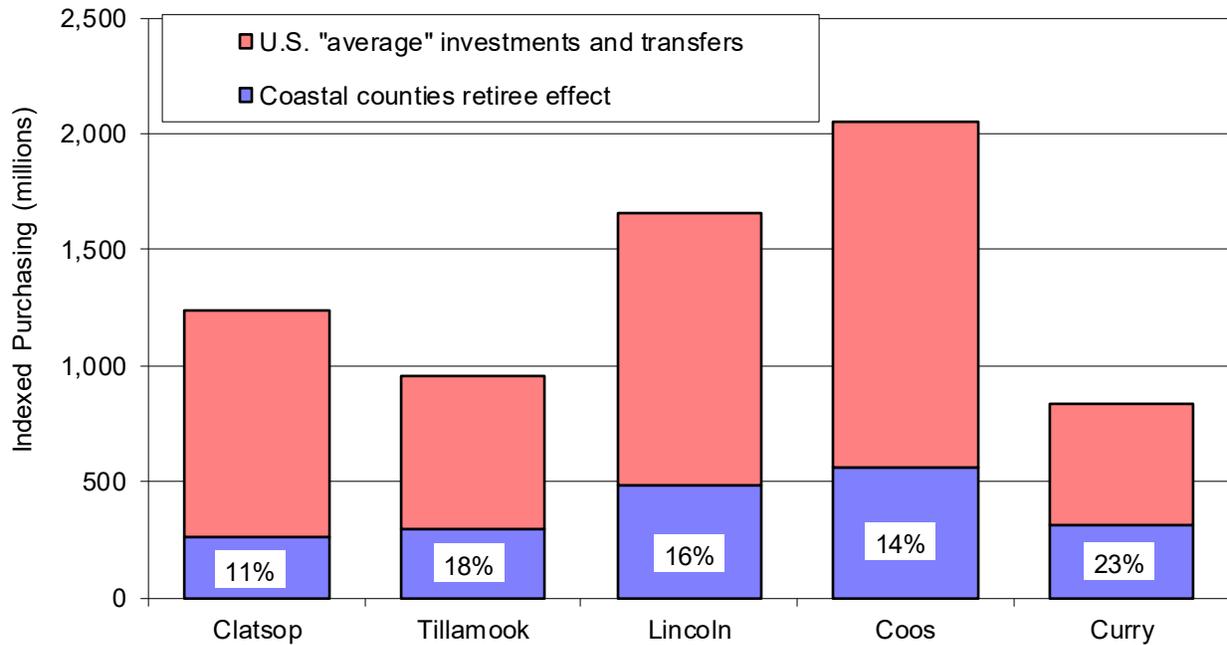
Table IV.F.1  
Coastal Counties Retiree Effect on Potential Purchasing Derivation in 2023

	U.S.	Oregon Coast	Clatsop County	Tillamook County	Lincoln County	Coos County	Curry County
Total personal income	\$23,380,269.0	\$12,417.3	\$2,504.3	\$1,698.5	\$3,034.8	\$3,842.3	\$1,337.3
Investment and transfer	\$9,074,528.0	\$6,735.3	\$1,237.3	\$958.6	\$1,658.2	\$2,048.1	\$833.0
Percent	38.8%	54.2%	49.4%	56.4%	54.6%	53.3%	62.3%
Investment and transfer personal income at the U.S. average proportion		\$4,819.5	\$972.0	\$659.2	\$1,177.9	\$1,491.3	\$519.0
Percent		38.8%	38.8%	38.8%	38.8%	38.8%	38.8%
Retiree effect over the U.S. average		\$1,915.8	\$265.3	\$299.4	\$480.3	\$556.8	\$314.0
Percent		15.4%	10.6%	17.6%	15.8%	14.5%	23.5%

- Notes: 1. Millions of 2023 dollars.  
 2. Coastwide is exclusive of coastal Lane and Douglas counties.  
 3. Retiree effect is a potential purchasing power index and does not represent total economic contribution from spending by retirement age residents.

Source: [13] and study.

Figure IV.F.1  
Coastal Counties Retiree Effect Potential Purchasing in 2023



Source: [13] and study.

## G. Well-being and Other Social Measures

Lincoln County distinguished by health and well-being characteristics in 2023 is shown on Table IV.G.1. There are indicators for educational attainment, access to health services, proportion of substandard housing, and crime rate. The same indicators are compared to the Oregon Coast and State for 2021 in Appendix Table C.1. All statistics show Lincoln County and the Coast are quite different than the State. For example, crime rate is less than the State. Each of these indicators would be a contributing consideration for business location decisions.

Indicators of prosperity for Lincoln County and Coast residents compared to the State are shown in Table IV.G.2 for 2021.

- The assessed value (all property types) per capita being higher in Lincoln County and the Coast would partially be reflective of the preponderance of higher priced second homes since owner residency is not local. It would also be affected by high assessed value of utilities and some industrial property in an area with low population density.
- The effective buying income (equivalent to the federal government's disposable personal income and a bulk measure of retail market potential) is less for Lincoln County and the Coast than the State.
- Bank deposits per capita are more in Lincoln County than the Coast, but less than for the State. This can be worsened by retiree age immigrants willing to bank online using accounts left at their previous residence banks.
- Retail sales per household in Lincoln County and the Coast are less than the State. A contributing factor is the sales leakages that occurs when coastal residents travel to large urban centers along the I-5 Corridor where price and product selection is better than on the Coast. An offsetting factor is a higher proportion of tourism spending on the Coast. The counties with big box businesses and serving as trade centers (such as Clatsop County) have higher rates than Lincoln County for this indicator.

Table IV.G.1  
Lincoln County Health and Social Characteristics

Prim. physicians per 1,000 persons (2022)	0.7
Mortality rate per 100,000 persons (2023)	1,293.0
Preventable hospitalizations per 1,000 persons (2022)	8.6
Uninsured (2021)	6.1%
Housing w / inadequate plumbing (2023)	0.3%
Rural population (2023)	38%
Foster care rate per 1,000 persons (2023)	8.7
Index crime per 1,000 persons (2023)	20.1
Voter participation (2022 general election)	67.5%

Sources: [2], [19], and [22].

Table IV.G.2  
Coastal Counties and Oregon Prosperity Measures in 2021

	Lincoln County	Coast	State
<u>Property Value</u>			
Assessed value total per capita	\$171,759	\$147,201	\$109,555
Net property tax rate	1.512%	1.301%	1.700%
<u>Wealth</u>			
Bank deposits per capita	\$24,084	\$22,848	\$26,782
Effective buying income per household (2023)	\$72,750	\$73,974	\$88,455
Retail sales per household (2017 data adjusted to 2021 dollars)	\$36,078	\$37,321	\$43,332
Average wage per worker	\$46,060	\$45,670	\$63,989

Notes: 1. Average wage per worker is for unemployment insurance covered employment in 2021.  
 2. Coastal counties are inclusive of Clatsop, Tillamook, Lincoln, Coos, and Curry counties, except bank deposits per capita also include coastal Lane and coastal Douglas counties.

Source: OCVA (January 2024).

## V. ECONOMIC DEVELOPMENT CHALLENGES<sup>31</sup>

The economic growth of the American West was highly dependent on the availability of cheap or free natural resources. For most of the 19th century the emphasis on public land management was simply to move land from federal to private ownership. During this formative period, many Americans viewed federal lands as a vast resource to be settled and exploited. Driving economic interests were fur trading, homesteading, agriculture, mining, fishing, and forest use.

The West's once-important natural resource industries declined dramatically in terms of jobs and incomes. These industries historically supported European settlement. They are still widely believed to be the economic lifeblood of the region's rural areas and small cities. Their decline still provokes deep anxiety. The fear is the region will become more depressed and more residents will be forced to leave. Despite these fears, the changing industrial structure has not triggered an overall decline in jobs, income, or residents in the region. On the contrary, as industrial transformation proceeded, in-migration, employment, and aggregate real income have increased.

The challenges facing economic development in Lincoln County and other coastal communities include dealing with its unique social and economic characteristics and geographical setting. The following challenges list are generalized and not all items are applicable to all coastal areas. Further, there are local, State and federal sponsored organizations with programs (both strategic planning and implementing initiatives) that are addressing threats and opportunities for economic development.

- Problems of distance and accessibility to producer's markets.
- Narrower bases of economic activity, making it vulnerable to cyclical swings.
- Lower levels of available labor, skill sets, and education/training facilities albeit there are many organizational efforts to provide workforce training and education programs.
- Gaps in communication and transportation networks.
- Lower population densities that deny "critical mass" levels for certain businesses, public services, and organizations.
- Public services water supply and wastewater treatment infrastructure is at or reaching capacity for many Coast's providers.
- Smaller tax bases, making the provision of public infrastructure and services more difficult to finance.
- Less access to and local control over private investment capital. Although, Oregon has active economic development districts that offer entrepreneurial support and small business financing.
- Unexplored need and impact assessment for the growing retirement age population.
- Movement towards technology for natural resource use, i.e. substitution of capital for labor will require a more educated workforce.

- Weather directed summer season tourism can overwhelm transportation systems and public services during the short summer season, putting emphasis on strategies using demand pricing and attraction promotions to favor shoulder seasons and winter events.
- Consolidation and centralization in commercial fishing, agriculture, and timber industries.
- Existing power rates are comparatively low and Bonneville Power Administration (BPA) pricing plan through 2025 is flat. However, there may be local utility and BPA budget pressures due to purchase arrangements with renewable energy generating providers that will lead to higher rates.
- Low provision of EV charging stations and gaps in access to high speed broadband.
- Lack of affordable housing for lower wage level job workers.
- Climate change related sea level rise and flooding, planning and mitigation for shoreline erosion, and tsunami preparedness.
- Natural disasters (earthquake/tsunami, flooding, wildfires) are related to changed migration patterns (induce out-migration and reduce in-migration) due to the perception of decreased quality-of-life.
- Dependence on a small circle of leaders who are often volunteers serving a variety of roles.
- Dealing with higher quality of life (lower crime rates, cleaner environment, scenic views, and less congestion) requires sophisticated planning and management to preserve.

Oregon coastal communities in closer proximity to large metropolitan areas are faring better economically than the more remote communities. Natural resource extractive industries are still important in these areas, but the commodity value is no longer an automatic comparative advantage for economic development. These areas have other advantages for economic growth: high quality of life being in a rural setting, sufficient medical, shopping, and other services, and comparably low land values. They also have transportation systems that allow a convenient driving distance to higher levels of education, medical services, airports, etc.

Policies to increase economic activity should seek to smooth out the business activity seasonal roller coaster. Infrastructure requirements designed for peak load are expensive, but not providing services at the peak level discourages private investments.

In economic terms, an area may have a "comparative advantage" over another area for reasons of proximity to production inputs (land and natural resources), capital incentives, ready markets, labor availability, intermodal transportation systems, and communication networks. Sometimes not recognizing what are the comparative advantages in changing market conditions will lead development efforts astray. Strategies can be costly for communities when unrequited. Economic development promotion efforts especially those addressing trying to change comparative advantages are tricky and need to be well studied for feasibility.

Local economic policy should treat the community's site-specific characteristics, both public services and the quality of the natural and social environments, as important determinants of

both citizen well-being and local economic vitality. In turn, visitors will be attracted from metropolitan areas for ecological and cultural based tourism. This will make public goods an important part of the local economic base, and attract desired economic growth. Economic growth can occur from distinctive places with a high quality of life:

- A resource base is still important, but no longer an automatic comparative advantage.
- Traditionally, more capital and more labor is what made economies grow. Technology is replacing those requirements.
- An extraordinary quality of life can attract and retain talented people.
- Knowledge businesses can occur anywhere, but adequate telecommunication infrastructure is required to take full advantage of these opportunities.
- Talented and skilled people are key to supporting a knowledge economy. Opportunities for educational enrichment are needed from kindergarten through life.

Large expanses of timberlands, water vistas, low density development, and footloose business opportunities (not tied to nearness of manufacturing input and market centers) will draw visitors and permanent residents. Knowledge based industries dependent on reliable and robust broadband services will be attracted to the quality of life amenities available to owners and workers in these coastal areas. The challenge will be to maintain these amenities as the region experiences growth.

## VI. DATA PROVENANCE AND BIBLIOGRAPHY

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- [5] Oregon Department of Education.

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#### **Employment inflow/outflow map:**

- [7] U.S. Census Bureau, Longitudinal Employer-Household Dynamics Program, Local Employment Dynamics Partnership, OnTheMap tool.

#### **Employment, wages, labor force, establishments:**

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- [9] Oregon Employment Department (OED), BLS Quarterly Census of Employment and Wages data (commonly referred to as the ES-202 Program).

#### **Household debt-to-income:**

- [10] Board of Governors, United States Federal Reserve, EFA: Household Debt using credit reporting agency data.

#### **Business formations and birth-to-death ratio:**

- [11] U.S. Census Bureau, Business Formation Statistics and Business Dynamics Statistics.

#### **Blue economy:**

- [12] U.S. Census Bureau, Nonemployer Statistics (NES) Marine Economy Table: 2022; and U.S. Bureau of Economic Analysis Marine Economy Satellite Account statistics.

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- [13] U.S. Bureau of Economic Analysis, Interactive Data Application tool, regional.

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## VII. ENDNOTES

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1. Example studies are: Dean Runyan Associates (2025) available at [https://industry.traveloregon.com/wp-content/uploads/2025/05/Oregon\\_2024\\_2025-05-01.pdf](https://industry.traveloregon.com/wp-content/uploads/2025/05/Oregon_2024_2025-05-01.pdf), and TRG (June 2024) available at <https://www.dfw.state.or.us/agency/docs/TRG%20Oregon%20fishing%20industry%202020-2021%20Report.pdf>.
2. The net earnings component of total personal income includes more than just wages and salaries. It also includes proprietor earnings. Wages and salaries typically are three quarters of net earnings, proprietor earnings are one fifth, and the balance is employer contribution to pensions. The share of net earnings that are proprietor earnings are generally higher at the Oregon Coast because there are more business units per employee than in the State.
3. Economic base model theory assumes a regional economy is divided into two sectors: basic (such as commercial fishing and timber) and all others (such as trade and services). The basic sector (also known as the export sector) depends on sales that occur outside the regional economy. The non-basic industries depend on selling within the local economy. Actually, there are crossover businesses; some sales will be exported out-of-area and other sales will be local. However, the bifurcation serves to explain the tenants of how economies work. The struggle for this modeling approach is the calculation of the basic sectors total economic contributions within the regional economy. The regional economy's total activity is supposedly known from widely reported by government sources (like the U.S. Bureau of Economic Analysis) and the aggregation of the basic sectors economic contributions should not exceed that checksum.
4. A historical context report for Lincoln County is Epperly et al. (April 2020). The report presents a broad socioeconomic profile of the Oregon Coast to better understand local and State differences. It contains early history and European American settlement descriptions to give readers an understanding of how current circumstances evolved.

An oral interview report (Bailey et al. May 2025) provides context information about Oregon's land use planning system and the role of an early coastwide organization formed to encourage natural resource conservation while allowing economic development.

5. The 2020 Labor Day Wildfires occurred during the COVID-19 pandemic. The combination effects on the economy were deleterious in aggregate, but had unusual perturbations at the industry sector level. At-home retail seafood prices increased dramatically early in the pandemic as people stayed home for cooking. The seafood industry responded to the increased demand with increased harvesting and processing later in the pandemic. The oversupply precipitately dropped prices leading to strained sector profits (TRG June 2024).  
Similarly, there was disruption in the timber industry during the pandemic. Mill owners decreased production early in the pandemic anticipating a projected recession. However, federal recovery programs had the unexpected impact of boosting the demand for wood products. Stimulus checks coupled with stay-at-home orders allowed many people to take on repair and remodeling projects. Low interest rates had the effect of boosting demand for housing. In short, demand for wood products was greater than expected. Meanwhile, COVID-19 cases at the mills and throughout the production chain limited the ability of lumber and plywood mills to respond to increased demand. Federal unemployment benefits made it more advantageous for some potential forestry and manufacturing personnel to stay at home, rather than return to work. Lumber and plywood prices rose to record highs (MBG and FEA September 2021).
6. The 2020 Labor Day Wildfires took place in many areas in Oregon. In all, the wildfires total area exceeded one million acres, destroyed 5,000 homes and businesses, and caused the loss of 11 lives. There was a relatively small fire in northwest Lincoln County (named the Echo Mountain Complex Fire) at 2,500 acres (84 percent privately owned), but was enormously costly destroying 25 percent of the 1,241 structures within the fire boundary. Fortunately there was no loss of lives (Oregonian 2020, OEM June 2023). Recovery is still ongoing five years later.

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Statewide, the immediate lost timber value was estimated to be \$30 billion (end-product value). The future annual timber economic impacts in Oregon are estimated to be \$5.9 billion (end-product-value) and 1,200-3,000 sector jobs over the next 40-years (MBG and FEA September 2021).

Wildfires have economic impact beyond the fire destruction. Smoke and road closures reduce retail trade and people avoid outdoor recreation. Long term impacts are related to business activity associated with damage to forest and aquatic ecosystems. Changed migration (induced out-migration and reduced in-migration) can be attributed to the perception of decreased quality-of-life (Boustan et al. 2020).

7. Natural resource use changes can also be brought about by litigation to enforce environmental laws, induced by new science about compatible consumptive uses of natural resources, and/or driven by changes in societal environmental values.
8. The area is very involved in economic development efforts with many assistance programs underway and planned. The lead agencies are Oregon Business and the Economic Development Alliance of Lincoln County. Business start-up assistance and training services is offered through the Oregon Coast Community College Small Business Development Center, Confederated Tribes of Siletz Indians, Regional Accelerator and Innovation Network and Senior Corps of Retired Executives. Loans and grants can originate at Business Oregon and the Oregon Cascades West Council of Governments. Workforce training and counseling is offered by Northwest Oregon Works. Other key resources are city/county community development and planning offices (Depoe Bay, Lincoln City, Lincoln County, Newport, Siletz, Toledo, Waldport, and Yachats), ports (Newport, Alsea and Toledo), downtown associations, urban renewal agencies and chamber of commerce. The Community Services Consortium offers an array of social services. Contact information for the agencies is in Cascades West Council of Governments (January 2024). Lincoln County's overlapping regional economic development assistance organizations is shown in Business Oregon (March 2023).
9. The Newport area has an active economic development organization called the Yaquina Bay Economic Foundation. The members include private business owners, leaders of local public services and non-profits as well as representatives from the local government. In many instances in Lincoln County, the same local leaders will be members of several organizations. This cross pollination provides for clarity and shared understandings on opportunities for attacking problems and backing new initiatives. Without such cooperation, there can be times that efforts will dissolve into deleterious inter-jurisdictional competition.
10. A SWOT analysis that has coverage for Lincoln County was recently completed by the CWEDD (September 2025). The EDALC has undertaken past SWOT analysis at the county level.
11. There are many example publications. A sample selection are at these websites: Economic Development Alliance of Lincoln County (2024) available at <https://businesslincolncounty.com/county-profile/>; Cascades West Economic Development District (CWEDD September 2025) available at <https://www.ocwcog.org/wp-content/uploads/2025/09/0.-FINAL-2025-30-CEDS-updated-9.12.25.pdf>; Business Oregon (2025) available at <https://www.oregonprospector.com>; The Ford Family Foundation (2025) available at <https://www.tfff.org/oregon-numbers/>; Headwaters Economics (2025) available at <https://headwaterseconomics.org/apps/economic-profile-system>; Epperly et al. (April 2020) available at <https://nrimp.dfw.state.or.us/DataClearinghouse/default.aspx?p=202&XMLname=42713.xml>.
12. Economic base model theory assumes a regional economy is divided into two sectors: basic (such as commercial fishing and timber) and all others (such as trade and services). The basic sector (also known as the export sector) depends on sales that occur outside the regional economy. The non-basic industries depend on selling within the local economy. Actually there are crossover businesses; some sales will be exported out-of-area and other sales will be local. However, the bifurcation serves to explain the tenants of how economies work. The struggle for this modeling approach is the calculation of the basic sectors total economic contributions within the regional economy. The regional economy's total activity is widely reported by government sources (like the U.S. Bureau of Economic Analysis) and the aggregation of the basic sectors economic contributions cannot exceed that checksum.
13. Industry employment data keys off wages and salary positions that are subject to unemployment insurance coverage. The Oregon Coast has comparatively many sole proprietorships that are uncovered, hence left out of

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the traditional employment information. Further, the classification system itself will not always reflect business activity within observed industries.

14. Inter-area purchasing refers to the acquisition of goods or services across different geographical boundaries. The key element is that a purchaser in one area sources from a supplier in another. For example, businesses in Tillamook County may make purchases in Lincoln County and vice versa. The downstream impacts would accrue to where the purchases are made.
15. The four statewide studies are (see bibliography section for full citations): TRG (June 2024), Oregon State University College of Agricultural Sciences (August 2021), Oregon Forest Resources Institute (2019), and Dean Runyan Associates (2022). It was sometimes necessary to itemize statewide studies' results for common primary business activity, convert economic activity metrics, and adjust to 2021 dollar year.
16. The Impact Analysis for Planning (IMPLAN) is an input-output model. The model is a product of IMPLAN Group LLC, 16740 Birkdale Commons Parkway, Suite 212, Huntersville, NC 28078.
17. These four basic industry categories production chain is through primary processing such as commercial fishing processing and timber dimension cut and plywood mills. Secondary manufacturing in these four categories is included in the other identified categories.
18. The demarcation of coastal Lane and Douglas counties uses ZIP code boundaries. The geographic areas were approximated by ZIP codes 97439, 97493, 97453, 97480, and 97430 for coastal Lane County and 97467, 97441, and 97473 for coastal Douglas County.
19. There has been an interruption to these general population growth trends in a recent three year period. Using Portland State University, Population Research Center estimates on July 1, the coastal counties population growth from 2020 to 2023 was 6.4 percent. The State change during this period was 0.5 percent.
20. There were two exceptions to coastal counties growing slower during the 2000 to 2023 period. Coastal Lane and Douglas counties grew much faster than the Coast and the State. There was a decline in working age families in the coastal areas in the past for these two counties as jobs in lumber and papermill employment went away. More recently, these areas have aged up and attracted retiree age population.
21. Blue Economy: <https://businesslincolncounty.com/blue-economy/>.
22. Oregon Ocean Resources and the Blue Economy Market Analysis: [https://www.oregon.gov/biz/Publications/Emerging\\_Industries/OceanResourcesBlueEconomy.FullReport.pdf](https://www.oregon.gov/biz/Publications/Emerging_Industries/OceanResourcesBlueEconomy.FullReport.pdf).
23. Net earnings includes wages and salaries; and, net income of proprietorships. The self-employed, agriculture and the commercial fishing industry work forces are specifically **not** included in payroll income. Proprietorships in commercial fisheries includes skippers who are sometimes the vessel owner and crewman.
24. Jobs include part-time and full time employment. Since one worker may hold more than one job, the two quantities are not equal. Per-job earnings is more than just wages and salaries. It also includes proprietorship earnings. Wages and salaries typically are three quarters of net earnings, proprietor earnings are one fifth, and the balance is employer contribution to pensions. The share of net earnings that are proprietor earnings is generally higher at the Oregon Coast because there are more business units per employee than in the State.
25. Poverty rate is a percent of population in Year 2023 from [2]. The rate is based on persons within families whose income is below a defined threshold. The rate references areas are defined by major ZIP code boundaries that encompass larger cities in Lincoln County. Where there are multiple ZIP codes, the rate is a weighted average based on ZIP code population. Groups of ZIP codes are referenced by the dominant city in the group. Lincoln City group includes ZIP codes for Lincoln City, Otis, and Neotsu; Newport group includes ZIP codes for Newport and South Beach; all others include only one ZIP code.
26. Covered jobs are those requiring unemployment insurance. The self-employed are not included in the worker data.
27. The availability of broadband services is a critical factor in business retention and formation. Moreover, the services allow employees to work from home when headquarters may be at far off locations. The services also

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provide for distance learning and telemedicine. Ensuring the availability of broadband services needs to become a basic tenant of local economic development efforts. The Oregon Broadband Advisory Council and the Business Oregon, Oregon Broadband Office (OBO) was created in the 2019 Legislature in passage of HB 2173. The OBO provides state funding and federal pass through funding to expand affordable high speed internet services everywhere across Oregon. Among the programs provided by the OBO is a map tool found at: <https://experience.arcgis.com/experience/cabe93fb001f4de49a82fbb9d0903a4f?viewer=broadband>. The map uses the most recently available broadband availability data from the Federal Communications Commission to illustrate broadband service availability and eligibility for the OBO funding programs.

28. Vacant and available land and buildings with proper zoning is important to businesses needing to expand or startup. There is usually a production immediacy that will not allow for time consuming investment negotiations and lengthy permitting schedules. Oregon Business has an Industrial Lands Programs that shows inventories and siting advantages including tax abatement programs. An interactive website called the Oregon Prospector provides a wealth of information about inventories and the communities where they are located. The website is: <https://www.oregonprospector.com/>

EDALC helps businesses looking to launch or expand in Lincoln County by providing information on the local market and available land and properties. They will also provide technical assistance for connecting to local, regional and state resources and incentives.

29. The concern for housing cost is addressed in this report's Section IV.D. The concern for affordability and availability of childcare is of high importance to families with a member wanting to enter the labor force and for businesses wanting to attract workers from outside-the-area. CSI (September 2025) reports that child care takes up a growing share of Oregon household budgets using 2022 data. The statewide average is 17.4 percent of typical wages. This is far above seven percent of household income considered affordable according to U.S. Department of Health and Human Services. Lincoln County is 13.4 percent. Per child costs in Lincoln County range from \$10,447 for a toddler to \$11,378 for an infant at a day care center. The availability of child care in Lincoln County is only nine percent for infants and 45 percent for toddlers. The availability statistic would rate Lincoln County as a child care desert according to OSU (2024). The combination of high costs and limited access carries serious economic consequences. Household members delay entering the workforce and families put off having children. Businesses see higher employee turnover, cause raised labor costs and disrupts workforce stability. There is downward pressure on net migration, leading to slower population growth.

Oregon government has a statewide strategic plan early for early childhood services (Oregon Early Learning Council 2023). The plan discusses what state agencies can do further early care in partnership with local agencies and the private sector. The Oregon Legislature in 2023 appropriated \$50 million in funds for childcare services infrastructure and other programs in HB 3005. Oregon has several family tax credits in support of the strategic plan including the new Oregon Kids Credit. The state initiatives will provide more opportunities for individuals to join the labor force and help local economies retain and attract employees.

30. The BLS does maintain a consumer expenditure survey program, but it is national level sampling. Results are shown for four U.S. regions, but cannot be assumed to apply to the Oregon Coast situation.
31. This chapter paraphrases discussions in OCVA (January 2024). The originating report is fully documented with supported research.

## **Appendix A**

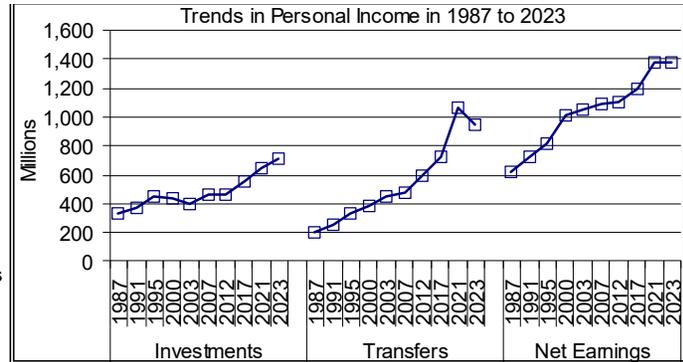
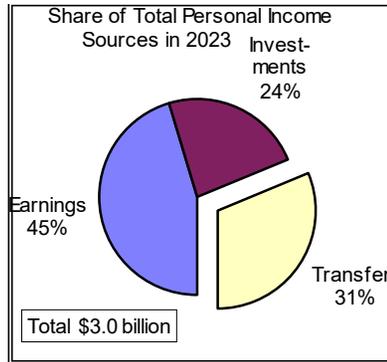
# **Lincoln County Abbreviated Social and Economic Characteristics and ZIP Code Areas**

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Figure A.1  
Lincoln County Abbreviated Social and Economic Characteristics

Modeled Sources of Total Personal Income in 2021		
	Income (millions)	%
<b>Total Personal Income (2021 nominal)</b>	<b>\$2,669.4</b>	<b>100.0%</b>
<b>1. Net Earnings</b>	<b>\$1,124.1</b>	<b>42.1%</b>
1.1. Identified industries	\$906.3	34.0%
1.1.1. Commercial fishing	\$182.8	6.8%
1.1.2. Agriculture	\$7.1	0.3%
1.1.3. Timber	\$29.9	1.1%
1.1.4. Travel tourism	\$261.5	9.8%
1.1.5. Other identified industries	\$135.8	5.1%
1.1.6. Other identifiable	\$289.2	10.8%
1.2. Other not identified	\$217.8	8.2%
<b>2. Investments</b>	<b>\$525.4</b>	<b>19.7%</b>
<b>3. Transfers</b>	<b>\$1,019.9</b>	<b>38.2%</b>
<b>Total Employment (2023 BLS covered)</b>	<b>18,547</b>	
<b>Unemployment Rate (2023)</b>	<b>4.2</b>	
<b>Per Capita Personal Income (2023)</b>	<b>\$59,715</b>	
<b>Population (2023)</b>	<b>50,821</b>	

Note: Investments/transfers include consumption multiplier effect.



Intra-County Income Distributional Differences in 2023				
	Population	Median Income	Poverty	Earnings
Oregon	4,233,358	\$80,426	11.9%	75.9%
County	51,005	\$61,314	15.7%	63.2%
New port	10,565	\$63,990	15.3%	64.0%
Lincoln City	10,032	\$58,936	14.3%	63.2%
Toledo	3,629	\$57,800	21.6%	72.7%
Waldport	2,337	\$57,700	16.4%	55.6%
Depoe Bay	1,546	\$62,900	11.4%	64.9%
Siletz	1,228	\$58,300	19.7%	69.0%
Yachats	994	\$71,200	7.8%	56.4%

Note: Income and earnings are for households. Income, poverty, and earnings are for encompassing ZIP code areas.

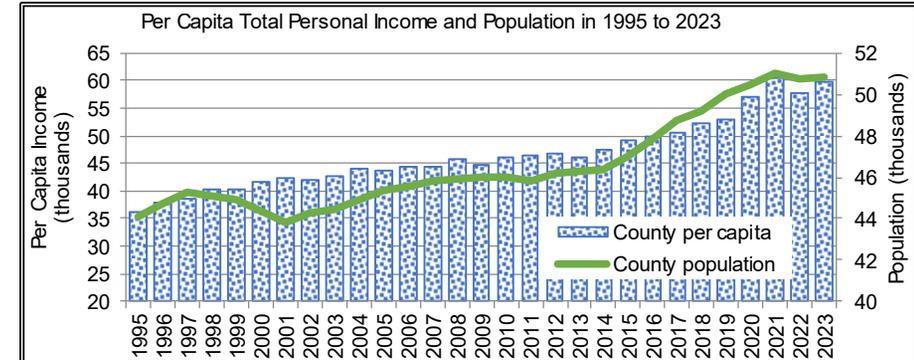
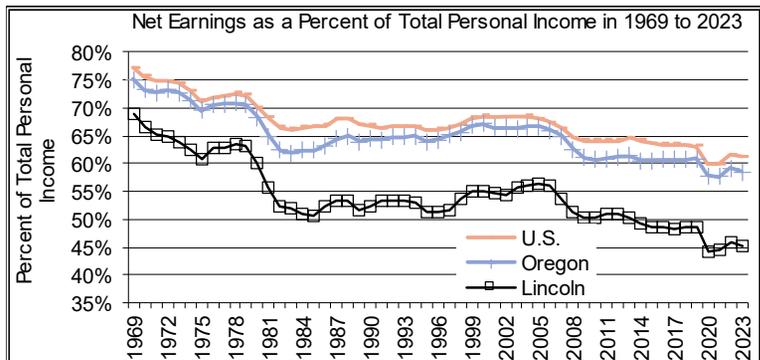
Housing Characteristics in 2023	
Housing units	32,373
Occupied	22,829
Occupied by renter	20.2%
Vacant	9,544
Vacant for second home	22.2%
Vacant - current residence elsewhere	2.7%

Health and Social Characteristics	
Prim. physicians per 1,000 persons (2022)	0.7
Mortality rate per 100,000 persons (2023)	1,293.0
Preventable hospitalizations/1,000 per. (2022)	8.6
Uninsured (2021)	6.1%
Bank deposits per capita (\$) (2023)	23,674
Housing w/ inadequate plumbing (2023)	0.3%
Rural population (2023)	38%
Foster care rate per 1,000 persons (2023)	8.7
Index crime per 1,000 persons (2023)	20.1
Voter participation (2022 general election)	67.5%

Population Characteristics		
	County	Oregon
Population (2023)	50,632	
Under 18	16.0%	20.2%
Age 18-64	52.9%	61.2%
65 and over	31.1%	18.6%
Median age	52.5	40.1
White alone	82.5%	
Components of population change (2010-2020)		
Total change	2,271	
Net migration	5,583	
Natural increase	-3,312	

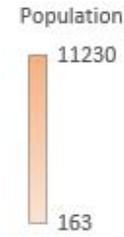
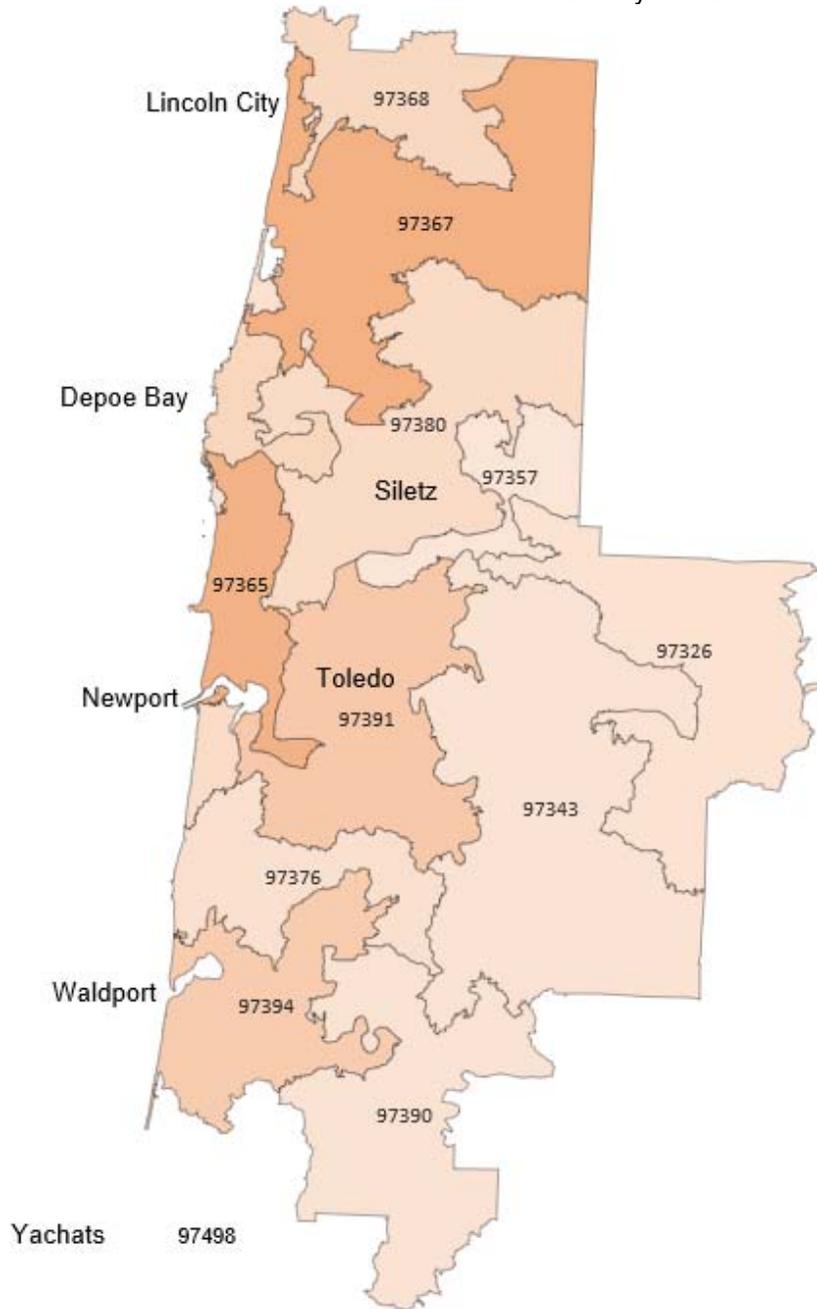
Prosperity Measures in 2023		
	County	Oregon
Per capita personal income	\$59,715	\$67,838
Average wage per worker	\$48,752	\$68,283
Median val. owner occ. home	\$387,700	\$454,200
Assessed value per capita	\$183,840	\$118,631

Land Ownership in 2020	
Private land	68%



Note: All trend monetary data prior to 2023 has been adjusted to Year 2023 real dollar using the Bureau of Economic Analysis GDP Implicit Price Deflator.

Figure A.2  
Lincoln County ZIP Code Areas and Population in 2023



Encompassing City	Population	ZIP Code Area		
		Name	Code	Population
Newport	10,565	Newport	97365	10,905
		South Beach	97366	2,169
Lincoln City	10,032	Lincoln City	97367	11,280
		Otis	97368	2,768
		Neotsu	97364	637
Toledo	3,629		97391	5,944
Waldport	2,337		97394	5,251
Depoe Bay	1,546		97341	3,194
Siletz	1,228		97380	2,116
Yachats	994		97498	2,141

Source: City population from [4]; ZIP code area population from [3].

## **APPENDIX B**

### **Sources of Total Personal Income in Coastal Counties in 2021**

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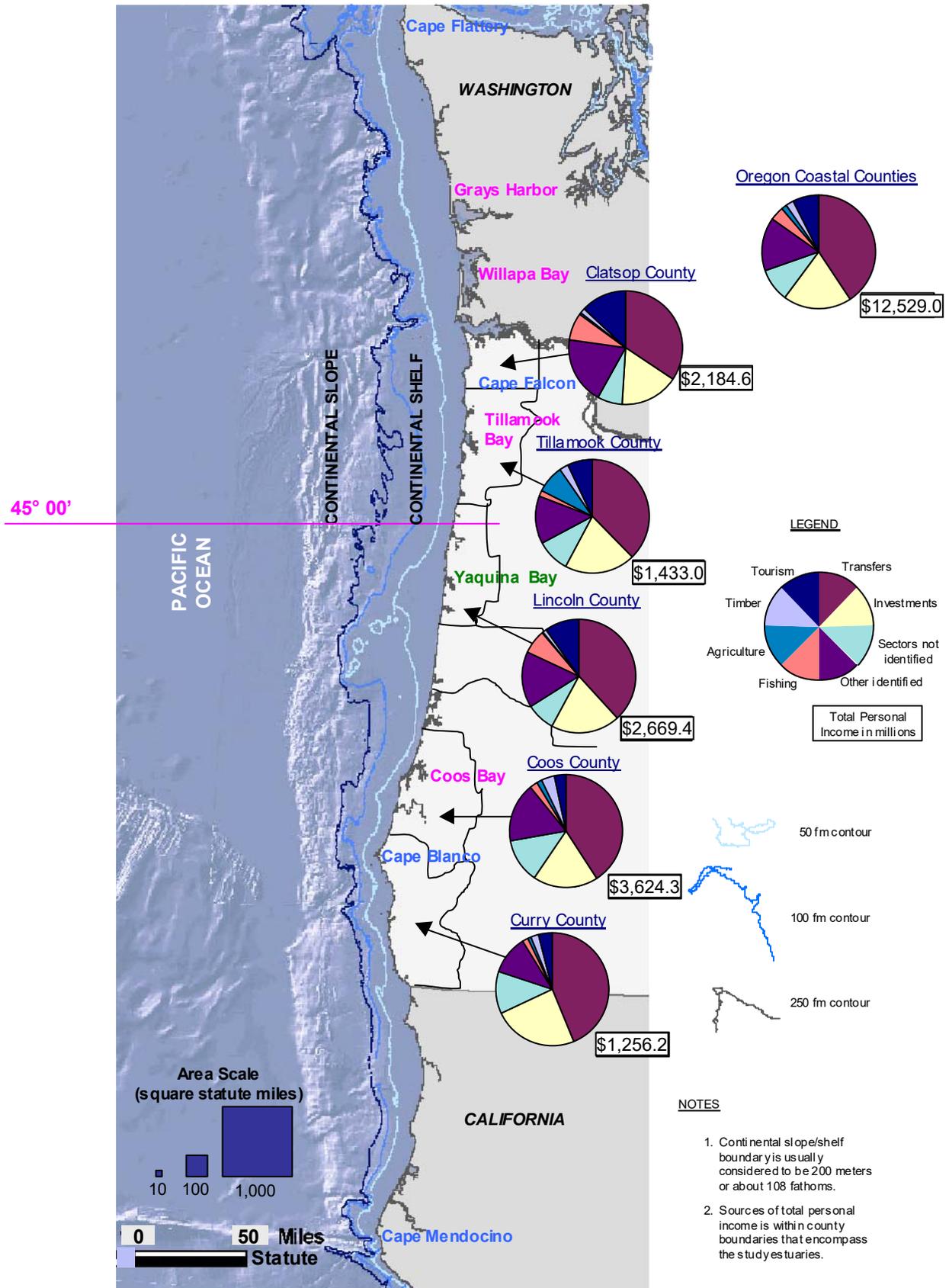
Table B.1  
Sources of Total Personal Income in Coastal Counties in 2021

	Clatsop		Tillamook		Lincoln		Coastal Lane		Coastal Douglas		Coos		Curry		Coastwide	
	Income	%	Income	%	Income	%	Income	%	Income	%	Income	%	Income	%	Income	%
Total Personal Income	2,184.6	100.0%	1,433.0	100.0%	2,669.4	100.0%	1,042.2	100.0%	319.3	100.0%	3,624.3	100.0%	1,256.2	100.0%	12,529.0	100.0%
1. Net Earnings	1,070.7	49.0%	604.5	42.2%	1,124.1	42.1%	190.2	18.3%	130.7	40.9%	1,468.7	40.5%	401.9	32.0%	4,990.8	39.8%
1.1. Identified industries	915.7	41.9%	469.6	32.8%	906.3	34.0%	157.9	15.1%	98.5	30.8%	1,006.2	27.8%	250.4	19.9%	3,804.5	30.4%
1.1.1. Commercial fishing	170.3	7.8%	24.4	1.7%	182.8	6.8%	0.1	0.0%	14.0	4.4%	81.9	2.3%	21.1	1.7%	494.5	3.9%
1.1.2. Agriculture	11.9	0.5%	112.9	7.9%	7.1	0.3%	--	--	--	--	53.8	1.5%	11.6	0.9%	197.3	1.6%
1.1.3. Timber	31.1	1.4%	36.6	2.6%	29.9	1.1%	4.8	0.5%	14.0	4.4%	136.8	3.8%	28.4	2.3%	281.6	2.2%
1.1.4. Travel tourism	284.5	13.0%	101.4	7.1%	261.5	9.8%	86.8	8.3%	24.8	7.8%	120.7	3.3%	49.4	3.9%	929.2	7.4%
1.1.5. Other identified industries	207.6	9.5%	45.4	3.2%	135.8	5.1%	13.3	1.3%	10.9	3.4%	124.1	3.4%	31.7	2.5%	568.9	4.5%
1.1.5.1. Paper and paperboard mills	115.4	5.3%	--	--	75.3	2.8%	--	--	--	--	--	--	--	--	190.7	1.5%
1.1.5.2. Water transp. and marine cargo	5.6	0.3%	1.4	0.1%	--	--	0.5	0.0%	0.2	0.1%	16.6	0.5%	0.8	0.1%	25.1	0.2%
1.1.5.3. Ship building, fabric., heavy manuf. and constr.	85.9	3.9%	44.0	3.1%	57.6	2.2%	12.9	1.2%	10.7	3.3%	104.2	2.9%	28.7	2.3%	343.9	2.7%
1.1.5.4. Mining	0.8	0.0%	--	--	2.9	0.1%	--	--	--	--	3.2	0.1%	2.2	0.2%	9.2	0.1%
1.1.6. Other identifiable	210.2	9.6%	148.8	10.4%	289.2	10.8%	52.9	5.1%	34.9	10.9%	488.9	13.5%	108.2	8.6%	1,333.1	10.6%
1.1.6.1. Higher ed., research, and training	9.8	0.5%	4.2	0.3%	36.2	1.4%	--	--	--	--	16.8	0.5%	0.9	0.1%	67.9	0.5%
1.1.6.2. Public health	8.1	0.4%	4.5	0.3%	7.7	0.3%	--	--	17.6	5.5%	146.8	4.0%	36.4	2.9%	221.1	1.8%
1.1.6.3. Tribal	--	--	--	--	24.0	0.9%	3.0	0.3%	--	--	22.9	0.6%	--	--	49.8	0.4%
1.1.6.4. Other	192.3	8.8%	140.2	9.8%	221.3	8.3%	49.9	4.8%	17.2	5.4%	302.4	8.3%	70.9	5.6%	994.2	7.9%
1.2. Other not identified	155.0	7.1%	134.9	9.4%	217.8	8.2%	32.3	3.1%	32.3	10.1%	462.5	12.8%	151.4	12.1%	1,186.3	9.5%
2. Investments	362.9	16.6%	288.7	20.1%	525.4	19.7%	242.7	23.3%	40.6	12.7%	674.1	18.6%	304.1	24.2%	2,438.4	19.5%
3. Transfers	751.0	34.4%	539.8	37.7%	1,019.9	38.2%	609.4	58.5%	148.0	46.4%	1,481.4	40.9%	550.3	43.8%	5,099.7	40.7%
Total Employment	25,093		14,172		25,757		5,438		2,249		31,898		10,590		115,197	
Unemployment Rate	5.9		5.5		6.7		7.2		3.4		6.3		6.6		6.2	
Per Capita Personal Income	52,250		51,643		52,482		60,167		51,058		55,759		53,044		53,847	
Population	41,810		27,748		50,862		17,322		6,254		64,999		23,683		232,678	

- Notes: 1. Personal income in millions of nominal dollars. Dashes can represent positive values, but are not sufficiently significant to show.  
2. Net earnings, investments, and transfers include the "multiplier effect."  
3. Investment and transfer economic contributions in coastal counties includes an out-of-area purchase factor.  
4. Coastal Lane and Douglas counties depend on ACS ZIP code data. It is necessary to adjust for the differences between BEA and ACS personal income definitions.

Source: OCVA (January 2024).

Figure B.1  
Coastal County Locations and Total Personal Income Sources in 2021



Source: OCVA (January 2024).

## **APPENDIX C**

### **Population, Housing, Geographic, Health, and Social Characteristics by State, Coast, and Coastal County**

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Table C.1  
Population, Housing, Geographic, Health, and Social Characteristics

	Clatsop	Tillamook	Lincoln	Coastal Lane	Coastal Douglas	Coos	Curry	Coast	Oregon
Total Personal Income in 2021 (\$millions)	2,185	1,433	2,669	1,042	319	3,624	1,256	12,529	261,547
Investments	341	271	493	228	38	633	286	2,289	46,810
Transfers	705	507	958	572	139	1,391	517	4,788	63,427
Net earnings	1,139	655	1,219	242	142	1,600	454	5,451	151,309
Housing Characteristics in 2021									
Housing units	22,882	18,846	31,862	9,939	3,123	31,283	12,981	130,916	1,798,864
Occupied	16,649	11,381	22,093	8,443	2,709	27,627	10,788	99,690	1,658,091
Occupied by renter	28.3%	18.0%	21.5%	24.6%	28.7%	27.6%	19.9%	23.9%	34.0%
Vacant	6,233	7,465	9,769	1,496	414	3,656	2,193	31,226	140,773
Vacant for second home	22.2%	35.5%	24.2%	12.0%	3.1%	4.5%	9.9%	17.9%	3.2%
Vacant - current residence elsewhere	1.0%	5.0%	2.5%	0.6%	0.8%	0.6%	0.9%	1.8%	0.4%
Population Characteristics in 2021									
Population	40,720	27,129	49,866	17,322	6,254	64,619	23,234	229,144	4,207,177
By age									
Under 18	18.6%	18.9%	16.9%	12.6%	19.3%	18.4%	14.3%	17.4%	20.8%
Age 18-64	58.9%	55.3%	53.7%	47.1%	51.2%	55.6%	51.6%	54.6%	61.6%
65 and over	22.5%	25.8%	29.4%	40.2%	29.5%	25.9%	34.0%	28.1%	17.7%
Median age	44.5	47.7	51.6	59.9	52.4	48.4	56.2	50.1	39.6
By race									
White alone	88.3%	90.0%	85.9%	91.5%	93.0%	87.7%	89.5%	88.3%	80.7%
Components of population change				Florence	Reedsport				
Total change, 2020-2021	356	238	508	204	1	225	216	1,543	29,364
Net migration	464	392	934	n/a	n/a	784	624	3,198	30,767
Natural increase	-108	-154	-426	n/a	n/a	-559	-408	-1,655	-1,403
Total change, 2010-2020	2,416	1,280	2,271	930	156	272	641	6,880	436,981
Net migration	2,184	2,190	5,583	n/a	n/a	5,798	4,492	20,247	340,134
Natural increase	232	-910	-3,312	n/a	n/a	-5,526	-3,851	-13,367	96,847
Income Characteristics in 2021									
Per capita income	34,387	31,501	32,776	34,838	26,849	31,824	34,302	32,792	37,816
Families in poverty	4.5%	9.2%	8.4%	9.3%	7.4%	11.7%	7.9%	8.8%	7.5%
Households with earnings	71.1%	64.3%	64.0%	50.7%	59.4%	61.8%	56.2%	62.5%	76.2%
Households with Social Security	40.7%	47.6%	49.2%	62.1%	52.8%	48.3%	56.9%	49.4%	32.9%
Households with retirement income	27.8%	32.6%	32.3%	40.7%	37.0%	31.2%	33.1%	32.2%	23.1%
Households with food stamps/SNAP benefits	15.7%	16.8%	18.0%	17.1%	17.9%	23.1%	15.5%	18.5%	16.0%
Educational Attainment in 2021									
Persons over 25 with high school education	92.1%	90.7%	92.7%	91.9%	90.4%	90.0%	91.9%	91.4%	91.5%
Persons over 25 with bachelors education	25.8%	22.4%	28.6%	25.9%	11.9%	20.0%	24.1%	23.8%	35.0%
Household Size in 2021									
	2.40	2.33	2.23	2.11	2.28	2.30	2.13	2.27	2.48
Labor Force Characteristics in 2021									
Participation rate	57.4%	50.5%	50.6%	38.1%	44.7%	51.3%	45.5%	50.3%	62.5%
Geographic Characteristics									
Area (square miles) in 2020	828	1,102	981	515	321	1,596	1,628	6,972	95,996
Density (persons per square mile) in 2021	49.2	24.6	50.8	33.7	19.5	40.5	14.3	32.9	43.8
Commute Patterns in 2021									
Did not work at home	91.8%	91.5%	89.5%	89.7%	87.0%	92.8%	83.5%	90.5%	87.5%
< 10 min.	26.3%	32.6%	27.9%	36.6%	42.7%	28.7%	38.5%	30.1%	15.9%
10-29 min.	52.1%	45.4%	52.5%	44.9%	32.5%	50.5%	41.0%	49.1%	52.7%
30+ min.	21.6%	22.0%	19.6%	18.5%	24.8%	20.7%	20.5%	20.8%	31.4%
Worked at home	8.2%	8.5%	10.5%	10.3%	13.0%	7.2%	16.5%	9.5%	12.5%
Land Ownership (1975)									
Federal	0.8%	20.3%	31.0%	n/a	n/a	23.7%	64.8%	32.0%	51.9%
BLM	0.1%	6.7%	3.8%	n/a	n/a	16.0%	6.5%	7.7%	25.3%
USFS	0.0%	12.7%	26.4%	n/a	n/a	5.4%	53.4%	22.0%	24.1%

Table C.1 (cont.)

	Clatsop	Tillamook	Lincoln	Coastal Lane	Coastal Douglas	Coos	Curry	Coast	Oregon
BIA	0.0%	0.0%	0.0%	n/a	n/a	0.0%	0.0%	0.0%	1.2%
Other	1.2%	0.0%	0.0%	n/a	n/a	0.0%	0.0%	0.2%	1.1%
State	9.8%	44.1%	3.6%	n/a	n/a	6.2%	1.1%	11.8%	2.5%
County	0.8%	0.7%	3.1%	n/a	n/a	2.1%	0.2%	1.3%	0.9%
Private	88.1%	35.8%	63.1%	n/a	n/a	70.3%	38.8%	57.0%	45.2%
Assessed property value per capita in 2021									
Residential	96,660	135,855	112,063	n/a	n/a	53,921	67,003	88,782	56,461
Commercial/industrial/multi-housing	26,784	16,184	25,833	n/a	n/a	17,312	24,021	21,864	23,384
Utilities	6,704	7,054	6,312	n/a	n/a	3,611	2,214	5,175	5,796
Other	37,648	43,436	27,550	n/a	n/a	18,171	51,266	31,379	23,915
Total	167,796	202,529	171,759	n/a	n/a	93,014	144,504	147,201	109,555
Net property tax rate	1.391%	1.132%	1.512%	n/a	n/a	1.308%	0.867%	1.301%	1.700%
Health and Social Characteristics in 2021									
Prim. physicians per 1,000 persons (2022)	0.8	0.6	0.7	0.8	0.9	0.9	0.5	0.7	0.8
Mortality rate per 100,000 persons (2023)	1,029.3	1,195.1	1,293.0	1,877.9	1,900.0	1,512.3	1,769.4	1,405.5	909.9
Preventable hospitalizations per 1,000 persons	8.2	7.1	8.6	7.3	15.0	12.1	8.4	9.4	5.7
Uninsurance	4.8%	6.1%	6.1%	n/a	n/a	4.4%	4.4%	5.1%	4.6%
Bank deposits per capita (\$)	22,968	22,383	24,084	30,129	19,439	19,705	24,761	22,848	26,782
Housing w/ inadequate plumbing	0.2%	0.3%	0.5%	0.7%	0.0%	0.5%	0.5%	0.4%	0.5%
Public land (2020)	26%	52%	32%	n/a	n/a	30%	55%	40%	56%
Rural population	39%	61%	38%	n/a	n/a	38%	52%	43%	20%
Foster care rate per 1,000 persons	8.4	5.5	11.1	n/a	n/a	11.0	6.7	9.3	6.4
Index crime per 1,000 persons	30.2	18.8	24.6	n/a	n/a	26.9	15.0	24.6	30.4
Voter participation (2022 general election)	66.0%	70.3%	67.5%	n/a	n/a	65.2%	67.3%	66.8%	66.9%

- Notes: 1. Coast is a geographic region comprised of five whole counties (Clatsop, Tillamook, Lincoln, Coos, and Curry), and coastal portions of Lane and Douglas.
2. Total personal income is in millions of 2021 dollars adjusted using the GDP price deflator developed by the U.S. Bureau of Economic Analysis.
3. Net migration equals in-migrants minus out-migrants. Natural increase equals births minus deaths.
4. Assessed value is reduced by amounts of exempt properties.
5. Income characteristics are from ACS based on 2017-2021 panel in 2021 dollars.
6. Poverty proportions are from ACS 2017-2021 panel. Poverty thresholds based on family status in both Census and ACS data sources, but methods differ and comparison caution is suggested. Example poverty threshold for a two children and two adult family is about 50 percent median income.
7. Sources of income are from ACS 2017-2021 panel (SS – social security, SNAP – food stamp).

Sources: [1] for 2020, and [2] for 2017-2021. Components of population change, and 2010-2021 population from [4]. Assessed property value and property tax rates are from [18]. [19] for physicians, mortality, uninsurance. [20] for bank deposits. [13] for total personal income. Land area by ZIP code for coastal Lane and Douglas is from [21], accessed October 2023. Public land in 2020, rural population, foster care, crime, and voter participation from [22]. Land ownership is from:

*Federal Lands:*

BLM Facts: Oregon and Washington, 1974-75.  
 Summary of National Forest Acreages as of June 30, 1975 (Information Sheet 5400).  
 Various publications, U.S. Fish and Wildlife Service.  
 Additional information supplied by the Bureau of Indian Affairs and National Park Service, Portland.

*State Lands:*

Biennial Report of the State Forester, 1972-1974. Oregon State Board of Forestry.  
 Biennial Report 1972-1974. State Land Board, Division of State Lands.  
 State Park Acreages. Oregon State Parks and Recreation Department (to June 30, 1975).  
 Various Publications, Oregon Department of Fish and Wildlife, 1975.

*County Lands:*

Information supplied by counties and by the Association of Oregon Counties, May 1976.

*Private Land:*

Figures determined by subtraction of the federal, state, and county lands from the county area.