

AN ECONOMIC ANALYSIS OF DOUGLAS COUNTY

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A SUMMARY OF CHANGES

Average Annual Growth 1970-2008

	Population	Employment	Total Industry Earning	Avg Earnings Per Job	Total Personal Income
Douglas	1.0%	1.7%	1.9%	0.1%	2.8%
Nonmetro Oregon	1.2	1.9	2.0	0.3	2.8
Oregon	1.6	2.4	3.2	0.7	3.5
United States	1.1	1.8	2.8	1.0	3.1

Average Annual Growth 2000-2008

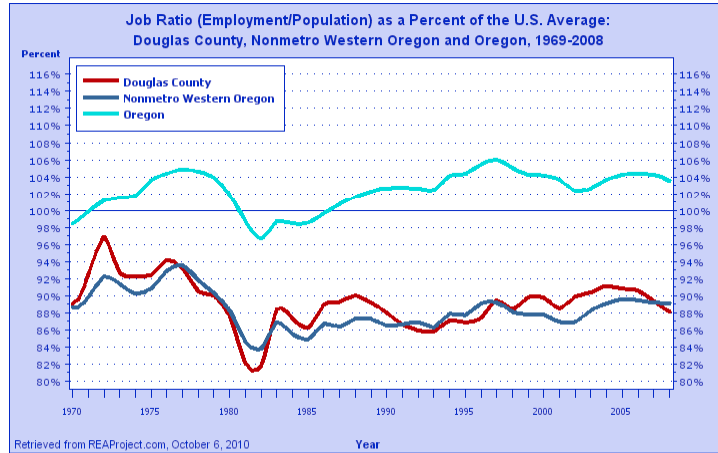
	Population	Employment	Total Industry Earning	Avg Earnings Per Job	Total Personal Income
Douglas	0.4%	0.5%	0.7%	0.2%	1.8%
Nonmetro Oregon	0.6	1.1	1.3	0.4	1.8
Oregon	1.2	1.5	1.8	0.3	2.1
United States	1.0	1.3	2.1	0.8	2.5

Source: US Bureau of Economic Analysis



JOB RATIOS

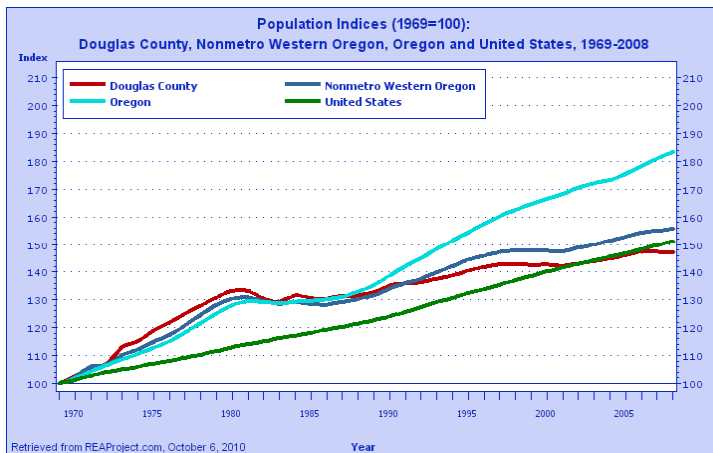
What is the economy's capacity to generate jobs as the population changes?



The job ratio has increased in the county but not as fast as national increases – this is due to lower labor force participation rates given the county's aging population, more people commute outside of the county to work, and differences in the number of full vs part time workers.

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Source: US Bureau of Economic Analysis, www.oregon.reaproject.org



Population Change Highlights

- 1 % average annual growth
- Slower than state, national, and nonmetropolitan western neighbors
- 1999-2008: 0.3% growth ranked 22/36 (9 have lost population)
- 2008: lost 0.2%

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Source: US Bureau of Economic Analysis, www.oregon.reaproject.org

Cumulative Components of Population Change: April 1, 2000 to July 1, 2009

Geographic Area	Total	
	Population Change¹	Natural Increase
Oregon	404,220	149,600
Douglas County	2,808	-990

Vital Events		Net Migration		
Births	Deaths	Total	Intern ational	Domest ic
433,972	284,372	274,031	95,484	178,547
10,283	11,273	4,418	272	4,146

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Source: Brian Rooney, Regional Economist, Oregon Employment Department
<http://www.olmis.org/olmisj/ArticleReader?itemid=00007039>

MIGRATION OVER TIME

- Declining across these statistical snapshots
 - 52.7% of the population lived in a different house in 1990 when compared to 1985
 - 47.8% of the population lived in a different house in 2000 when compared to 1995
 - 60% move from within the county
 - 15% come from somewhere in Oregon
 - 20% come from another State in the West
 - 18.5% (+/- 1.8%) from 2005-2007 to 2006 – 2008
 - 67% moved from within the county
 - Equal parts moving from somewhere in Oregon and from other states

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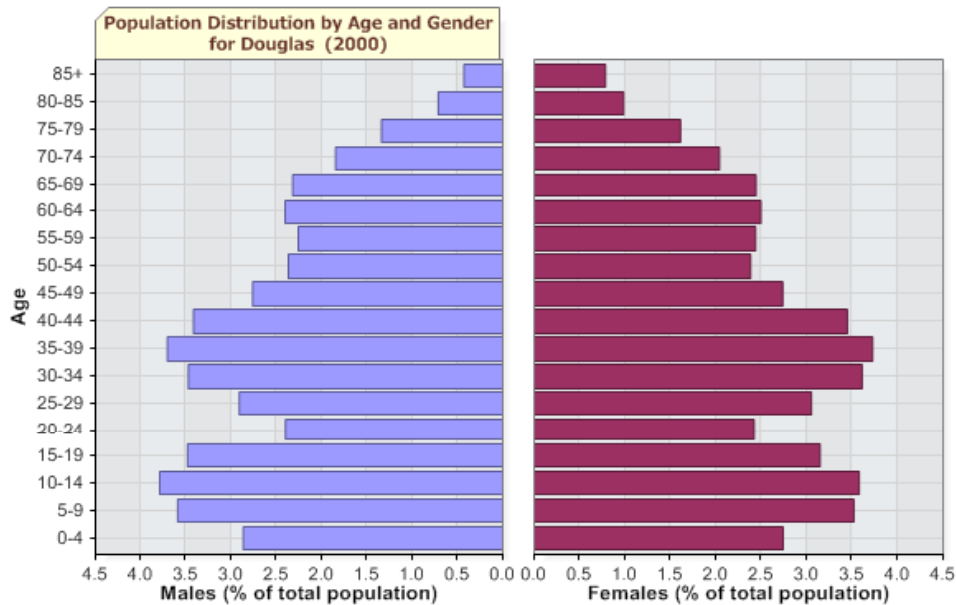
Source: US Census Bureau, <http://oregonexplorer.info/rural/>

Age structure highlights

- Median age 41 (2000); 43.8 (+/- 0.4) (2006-2008)
- 1990 to 2000 Change
 - 3 % decline in ages 9 and under
 - 5% decline in ages 25 to 44
 - 5% growth in ages 45 to 59 (some aging in place in 10 years)
 - 2% growth in ages 75 to 84
- 2000 to 2006-2008 average
 - 4 % decline in ages 5 to 19
 - 1 % decline in ages 25 to 44
 - 2 % growth in ages 55 to 64
 - 2 % growth in ages 75 and up

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Source: US Census Bureau, <http://oregonexplorer.info/rural/>



Source: US Census Bureau, <http://oregonexplorer.info/rural/>

SUMMARY WAGE AND AGE CHANGE

	<u>Jobs by Worker Age</u>			
	2008		2002	
	Count	Share	Count	Share
Age 29 or younger	8,984	24.4%	8,842	24.3%
Age 30 to 54	19,960	54.1%	21,792	59.9%
Age 55 or older	7,935	21.5%	5,747	15.8%

- Excludes self employment, farmers, railroad workers, and some construction workers.

	<u>Jobs by Earnings Paid</u>			
	2008		2002	
	Count	Share	Count	Share
\$1,250 per month or less	10,741	29.1%	12,951	35.6%
\$1,251 to \$3,333 per month	16,468	44.7%	15,757	43.3%
More than \$3,333 per month	9,670	26.2%	7,673	21.1%

Data Sources

US Census Bureau, LED OnTheMap Origin-Destination Database
 (Beginning of Quarter Employment, 2nd Quarter 2008, 2007, 2006, 2005, 2004, 2003, and 2002) <http://lehmap4.did.census.gov/themap4/>

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COMMUTING SUMMARY

- There are more employed residents than private, nonfarm, wage and salary jobs in Douglas County
 - Increased commuting: more people leave the county for employment
 - Strongest commuting links: Lane, Coos, Jackson, Josephine
 - Douglas exports jobs to Coos and Josephine Counties; imports from Lane and Jackson
 - Commuting flows have increased in both directions with all four counties from 2002 to 2008

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COMMUTING DESTINATIONS FOR DOUGLAS COUNTY RESIDENTS

	2008		2002	
	Count	Share	Count	Share
Working Douglas County Residents:	36,879	100.0%	36,381	100.0%
	2008		2002	
	Count	Share	Count	Share
Roseburg city, OR	12,787	34.7%	13,714	37.7%
Winston city, OR	2,031	5.5%	2,882	7.9%
Eugene city, OR	1,394	3.8%	872	2.4%
Sutherlin city, OR	1,234	3.3%	1,358	3.7%
Medford city, OR	1,052	2.9%	798	2.2%
Portland city, OR	836	2.3%	566	1.6%
Green CDP, OR	784	2.1%	805	2.2%
Reedsport city, OR	769	2.1%	985	2.7%
Springfield city, OR	622	1.7%	395	1.1%
Myrtle Creek city, OR	578	1.6%	649	1.8%
All Other Locations	14,792	40.1%	13,357	36.7%

- Over 1/3 of working Douglas County residents go to work in Roseburg

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US Census Bureau, LED OnTheMap Origin-Destination Database (Beginning of Quarter Employment, 2nd Quarter 2008, 2002) <http://lehdmap4.did.census.gov/themap4/>

WHERE DO PEOPLE EMPLOYED IN DOUGLAS COUNTY LIVE?

	2008		2002	
	Count	Share	Count	Share
Number of jobs in Douglas County:	35,315	100.0%	35,182	100.0%
	2008		2002	
	Count	Share	Count	Share
Roseburg city, OR	6,960	19.7%	7,700	21.9%
Green CDP, OR	2,373	6.7%	2,780	7.9%
Sutherlin city, OR	1,791	5.1%	1,952	5.5%
Roseburg North CDP, OR	1,591	4.5%	1,808	5.1%
Myrtle Creek city, OR	1,252	3.5%	1,381	3.9%
Tri-City CDP, OR	900	2.5%	985	2.8%
Winston city, OR	875	2.5%	915	2.6%
Reedsport city, OR	735	2.1%	835	2.4%
Eugene city, OR	647	1.8%	592	1.7%
Grants Pass city, OR	489	1.4%	356	1.0%
All Other Locations	17,702	50.1%	15,878	45.1%

- Nearly 1/5 of all of the people who work in Douglas County live in Roseburg

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US Census Bureau, LED OnTheMap Origin-Destination Database (Beginning of Quarter Employment, 2nd Quarter 2008, 2002)

2008 Data Totals for all industries

County Business Patterns at the Zip Code Level provides data on the total number of establishments, mid-March employment, first quarter and annual payroll, and number of establishments by nine employment-size classes and by ZIP Code.	Geographic Area Name	Number of establishments	Number of employees	First-quarter payroll (\$1,000)	Annual payroll (\$1,000)
	ROSEBURG (97470)	1,585	19,494	\$ 158,936	\$ 607,128
	SUTHERLIN	197	1,489	8,692	38,261
	REEDSPORT	190	1,310	7,964	35,869
	MYRTLE CREEK	175	1,272	6,937	29,597
	WINSTON	104	749	3,621	15,774
	DRAIN	53	449	2,649	10,759
	ROSEBURG (97471)	39	328	2,286	9,426
	RIDDLE	37		D	D
	YONCALLA	26	133	764	3,686
	LAKESIDE	23	149	719	2,672
	ELKTON	22	88	485	2,290
	WINCHESTER	16	48	162	683
	GARDINER	3	a	D	D

Source: Zip Code County Business Patterns, 2008

THE SERIES EXCLUDES DATA ON SELF-EMPLOYED INDIVIDUALS, EMPLOYEES OF PRIVATE HOUSEHOLDS, RAILROAD EMPLOYEES, AGRICULTURAL PRODUCTION EMPLOYEES, AND MOST GOVERNMENT EMPLOYEES.

CANYONVILLE SHOWS A TOTAL OF 58 ESTABLISHMENTS WITH 1,458 JOBS, 1 ESTABLISHMENT HAD BETWEEN 500 AND 999 JOBS ON MARCH 12, 2008

HIGHLY PAID JOBS

- There are a near equal number of residents who have highly paid jobs and highly paid jobs present in the county
 - 73% of highly paid jobs are taken by Do. Co. residents; growth over time but falling share
 - Number of highly paid jobs and highly paid residents have increased nearly evenly in the county
 - Similar flow patterns exist among highly paid jobs
 - Net importer from Lane and Jackson
 - Net exporter to Coos and Josephine
 - Commuting flows have increased in all directions

WITHIN COUNTY COMMUTING

Where are the county's highly paid jobs?

- 31% Roseburg
- 13% Winston
- 3% Eugene
- 2% Reedsport
- 1% Coos Bay

Inner county transfers:
Roseburg and Winston export highly paid jobs to I-5 neighbors

Highly paid = \$3,333 or more monthly

Where do highly paid residents live?

- 20% Roseburg
- 2% Winston
- 2% Eugene
- 2% Reedsport
- 1% Coos Bay
 - 6% Green
 - 4% Sutherlin
 - 4% Roseburg North
 - 4% Myrtle Creek
 - 3% Tri-City

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Labor Force

- Labor force participation rate
 - Small decline
 - 44.8 % of the population participates in the labor force (46.3% in 1990)

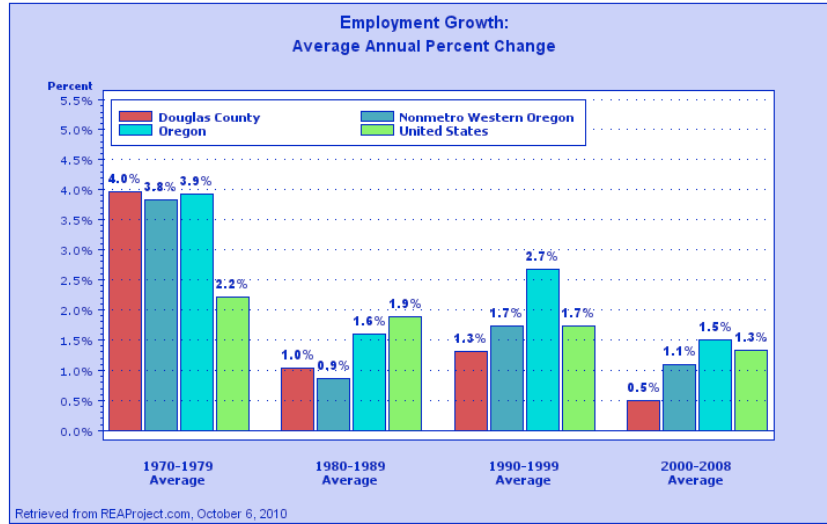
Count of jobs in Douglas County*

- 1990 : 46,354 jobs
 - 24% self employed
- 2000 : 52,831 jobs
 - 24% self employed
- 2008 : 54,481 jobs
 - 27% self employed

* Place of work basis full-time and part-time jobs, including self proprietors, farm labor, and people working in companies with private unemployment insurance.

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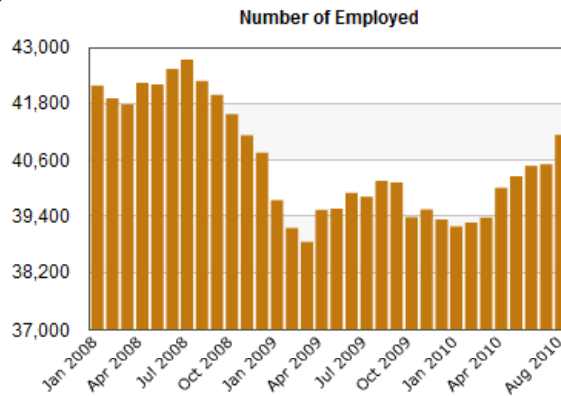
EMPLOYMENT CHANGE



Source: US Bureau of Economic Analysis, www.oregon.reaproject.org

○ Unemployment Rate

- 15.4% seasonally adjusted in Sept 2010
- Third highest in the state
- 15.6% Sept 2009
- Fall unemployment rates the highest



Source: Oregon Employment Department

Data figure from the Oregon County Monitor: <http://osu.prognoz.com/>

POPULATION EFFECTS OF THE RECESSION

- 252 people per every 1,000 accessed food stamps in August 2010, 4th highest in the state
 - Increase from 240 in Jan, 2010
 - State average 190 in Aug 2010
- 7th highest TANF use: 21 people per every 1,000 accessed Temporary Assistance for Needy Families in August 2010 and Jan 2010
 - State average 19/1000; County Range 32 to 3 per 1,000
- Josephine and Coos Counties have similar rates on both measures

Data from the Oregon County Monitor: <http://osu.prognoz.com/>

TOP 10 INDUSTRY STRUCTURE AND GROWTH

**Employment by Major Industry:
Douglas County, 2001 - 2008**

Major Industry	2007			2001-2008 Averages		2001-2008 Share Shift	
	Employment	Percent of Total	Rank	Location Quotient	Percent of Total		
🔍 Retail Trade	6,436	11.6	1	1.1	11.5	1.1	-0.2
🔍 Manufacturing	6,260	11.3	2	1.4	12.2	1.4	-2.2
🔍 Health Care & Social Assistance	6,065	11.0	3	1.1	10.7	1.1	1.7
🔍 Local Government	5,951	10.8	4	1.4	11.0	1.4	-0.8
🔍 Accommodation & Food Services	3,711	6.7	5	1.0	6.6	1.0	0.2
🔍 Construction	3,365	6.1	6	1.0	5.6	0.9	0.8
🔍 Other Services, Except Public Admin.	3,169	5.7	7	1.0	5.7	1.0	0.2
🔍 Real Estate & Rental & Leasing	2,451	4.4	8	1.0	3.8	1.0	1.5
🔍 Farm Employment	2,390	4.3	9	2.9	4.7	3.0	-0.7
🔍 Administrative & Waste Services	2,373	4.3	10	0.7	3.9	0.7	0.8

Source: US Bureau of Economic Analysis, www.oregon.reaproject.org

Major Industry	Employment Growth 2008				
	Growth Rate	Component Contribution	National Growth Rate	Local - National Growth Rate	Rank
Administrative & Waste Services	3.5	0.2	-0.8	4.3	1
Arts, Entertainment & Recreation	7.2	0.1	3.9	3.3	2
Finance & Insurance	5.5	0.1	2.5	3.0	3
Federal Civilian	3.6	0.1	1.3	2.4	4
Farm Employment	0.1	0.0	-0.8	0.9	5
Utilities	2.6	0.0	1.7	0.8	6
Other Services, Except Public Admin.	1.0	0.1	1.1	-0.1	7
Wholesale Trade	-0.3	-0.0	-0.1	-0.2	8
Real Estate & Rental & Leasing	7.1	0.3	7.8	-0.6	9
State Government	0.0	0.0	1.0	-1.0	10
Local Government	-0.5	-0.1	1.5	-2.0	11
Health Care & Social Assistance	0.6	0.1	3.3	-2.6	12
Forestry, Fishing & Related Activities	-1.0	-0.0	2.0	-3.0	13
Accommodation & Food Services	-2.5	-0.2	0.5	-3.0	14
Transportation & Warehousing	-1.8	-0.1	1.3	-3.0	15
Mining	11.1	0.0	14.2	-3.1	16
Unreported	-1.0	-0.0	3.2	-4.2	17
Manufacturing	-7.0	-0.8	-2.7	-4.3	18
Retail Trade	-5.3	-0.6	-0.9	-4.4	19
Federal Military	-2.6	-0.0	1.8	-4.5	20
Educational Services	-1.3	-0.0	3.4	-4.7	21
Construction	-9.0	-0.5	-2.7	-6.3	22
Information	-8.6	-0.1	-0.8	-7.8	23
TOTAL	-1.4	-1.4	1.0	-2.5	

Source: US Bureau of Economic Analysis, www.oregon.reaproject.org

OREGON EMPLOYMENT DEPARTMENT PROJECTIONS BY NICK BELEICIKS

Trending Upward

- Education and health services
 - Up 850 jobs (19%)
- Retail Trade
 - Up 450 jobs (10%)
- Professional and Business Services
 - Up 350 jobs (12%)
- Food and Drinking Places
 - Up 320 jobs (12%)

Trending Downward

- Durable Good Manufacturing
 - Down 390 jobs (8%)
 - Wood Product Manf.
 - Down 130 jobs (4%)
- Logging
 - Down 70 jobs (8%)

6% employment growth during the next 10 years.

From 1999-2008 the county experienced 0.66% average annual employment growth

OREGON EMPLOYMENT DEPARTMENT PROJECTIONS BY NICK BELEICIKS

Region 6: Industry Employment Forecast, 2008-2018
Douglas County

	2008	2018	Change	% Change
Total payroll employment	38,130	40,560	2,430	6%
Total private	29,350	31,270	1,920	7%
Natural resources and mining	1,410	1,360	-50	-4%
Mining and logging	880	810	-70	-8%
Construction	1,700	1,680	-20	-1%
Manufacturing	5,260	4,890	-370	-7%
Durable goods	4,930	4,540	-390	-8%
Wood product manufacturing	3,230	3,100	-130	-4%
Nondurable goods	330	350	20	6%
Trade, transportation, and utilities	6,820	7,430	610	9%
Wholesale trade	640	690	50	8%
Retail trade	4,440	4,890	450	10%
Food and beverage stores	1,100	1,200	100	9%
General merchandise stores	1,000	1,200	200	20%
Transportation, warehousing, and utilities	1,740	1,850	110	6%
Information	330	320	-10	-3%
Financial activities	1,620	1,680	60	4%
Professional and business services	2,940	3,290	350	12%
Educational and health services	4,540	5,390	850	19%
Leisure and hospitality	3,550	3,960	410	12%
Food services and drinking places	2,770	3,090	320	12%
Other services	1,180	1,270	90	8%
Government	8,780	9,290	510	6%
Federal government	1,530	1,530	0	0%
State government	1,140	1,230	90	8%
Local government	6,110	6,530	420	7%
Indian tribal	1,190	1,400	210	18%
Local education	2,830	2,940	110	4%

Note: Industry and occupational employment totals are not equal due to rounding.
Farm employment is included in natural resources and mining.
Previous industry projections were limited to nonfarm employment.

<http://www.qualityinfo.org/pubs/projections/r6.pdf>

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OCCUPATION DEFINITIONS

- Management and professional
 - Business, financial, computer, architecture, engineering, science, legal, education, healthcare
- Service
- Sales and office
- Farm
- Construction
- Transport and production
 - Assemblers, production workers, food processors, metal, wood fabricators
- Oregon State comparisons: 2005 estimates
- Managerial : significantly higher 33%
- Service : lower 15%
- Sales and Office : higher 26%
- Farming, fishing, forestry : comparable but lower 1.7%
- Construction : comparable 9.1%
- Production and transport : lower 14.7%

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Standard Occupation Classification, Bureau of Labor Statistics, US Census

Occupations	1990	2000		2006 - 2008		
Civilian employed population 16 years and over			Change	best est. change	low	high
Management, professional, and related occupations	19.2	25.5	+	24.1	22.7	25.5
Service occupations	15.7	18.2	+	19.9	17.9	21.9
Sales and office occupations	23.4	23.2		24.9	23.0	26.8
Farming, fishing, and forestry occupations	7.0	2.8	-	2.8	1.9	3.7
Construction, extraction, maintenance and repair occupations	10.7	9.8	-	10.6	9.3	11.9
Production, transportation, and material moving occupations	24.0	20.5	-	17.6	16.0	19.2 ²⁵

Source: US Census Bureau, <http://oregonexplorer.info/rural/>

Occupational Employment Projections, 2008-2018
Region 6 (Douglas County)

Standard Occupational Classification Code and Title	Employment				2008-2018 Openings		
	2008	2018	Change	Percent Change	Due to Growth*	Due to Replacement	Total
Total All Occupations	38,230	40,473	2,243	5.9%	2,651	9,307	11,958
Health Care	2,940	3,417	477	16.2%	477	526	1,003
29-0000 Healthcare Practitioner and Technical Occupations	1,852	2,119	267	14.4%	267	390	657
29-1000 Health Diagnosing and Treating Practitioners	1,265	1,446	181	14.3%	181	247	428
29-2000 Health Technologists and Technicians	556	640	84	15.1%	84	133	217
31-0000 Healthcare Support Occupations	1,088	1,298	210	19.3%	210	136	346
Service	6,684	7,335	651	9.7%	651	2,023	2,674
35-0000 Food Preparation and Serving Related Occupations	3,615	4,016	401	11.1%	401	1,291	1,692
35-3000 Food and Beverage Serving Workers	2,069	2,301	232	11.2%	232	803	1,035
Office and Administrative Support	5,592	6,004	412	7.4%	420	1,212	1,632
Sales and Related	3,775	4,071	296	7.8%	299	1,165	1,464
41-2000 Retail Sales Workers	2,332	2,562	230	9.9%	230	848	1,078

Source: Oregon Employment Department see full report and educational requirements at: <http://www.qualityinfo.org/pubs/demand/6.pdf>

ESTABLISHMENT SIZES FROM COUNTY BUSINESS PATTERNS- ZIP CODE LEVEL

Meaning of Employment size of estab	FLOR		REED		ROS SUT			Grand Total	100%		
	DRAIN	E	CREEK	T	BURGRG	LIN	ON			ALLA	
All establishments	53	454	175	190	1585	39	197	104	26	2823	100%
1 to 4 employees	33	255	104	135	801	31	111	60	19	1549	55%
5 to 9 employees	10	110	32	26	339	3	48	24	4	596	21%
10 to 19 employees	4	53	23	15	261	3	24	9	2	394	14%
20 to 49 employees	5	27	14	10	123		13	10		202	7%
50 to 99 employees	1	5	2	3	30	1		1	1	44	2%
100 to 249 employees		3		1	26	1				31	1%
250 to 499 employees		1			3		1			5	0%
500 to 999 employees					1					1	0%
1,000 employees or more					1					1	0%

The series excludes data on self-employed individuals, employees of private households, railroad employees, agricultural production employees, and most government employees.

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FIRMS AND EMPLOYMENT BY SIZE

Establishments	2000	2008	Average	Jobs	2000	2008	Average
Total	5,891	8,634	7,262	Total	49,013	50,855	49,934
Noncommercial	8.4%	6.9%	7.6%	Noncommercial	14.7%	17.3%	16.0%
Nonresident	3.7%	2.6%	3.1%	Nonresident	11.2%	13.0%	12.1%
Resident	87.9%	90.5%	89.2%	Resident	74.0%	69.7%	71.9%
<u>Self employed (1)</u>	34.5%	39.1%	36.8%	<u>Self employed (1)</u>	4.9%	8.6%	6.8%
Stage 1 (2-9)	54.3%	54.1%	54.2%	Stage 1 (2-9)	27.1%	35.9%	31.5%
Stage 2 (10-99)	10.6%	6.5%	8.5%	Stage 2 (10-99)	31.9%	32.7%	32.3%
Stage 3 (100-499)	0.5%	0.3%	0.4%	Stage 3 (100-499)	10.7%	11.1%	10.9%
Stage 4 (500+)	0.1%	0.1%	0.1%	Stage 4 (500+)	25.4%	11.6%	18.5%

Stages - Percent of Resident Establishments (average), Jobs (average), and Positive Job Growth
United States 2000-2008



Coverage: The National Establishment Time Series (NETS) includes state and local government workers, railroad workers, crop and animal production, rail transportation, National Postal Service, pension, health, welfare, and vacation funds, trusts, estates, and agency accounts, private households, and public administration.

Source: Edward Lowe Foundation; <http://www.youreconomy.org>

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HEALTHCARE

Stages - Percent of Resident Establishments (average), Jobs (average), and Positive Job Growth
Douglas (OR) county Health Care and Social Assistance industry 2000-2008



Establishments	2000	2008	Change	%	Jobs	2000	2008	Change	%
Total	385	494	109	28.3%	Total	5,760	6,197	437	7.6%
Noncommercial	no non-commercial in this industry				Noncommercial	no non-commercial in this industry			
Nonresident	11	17	6	54.5%	Nonresident	928	1,180	252	27.2%
Resident	374	477	103	27.5%	Resident	4,832	5,017	185	3.8%
Self employed (1)	65	80	15	23.1%	Self employed (1)	65	80	15	23.1%
Stage 1 (2-9)	231	310	79	34.2%	Stage 1 (2-9)	919	1,223	304	33.1%
Stage 2 (10-99)	73	82	9	12.3%	Stage 2 (10-99)	1,600	2,127	527	33.0%
Stage 3 (100-499)	3	4	1	33.3%	Stage 3 (100-499)	507	587	80	15.8%
Stage 4 (500+)	2	1	-1	-50.0%	Stage 4 (500+)	1,741	1,000	-741	-42.6%

Source: Edward Lowe Foundation; <http://www.youreconomy.org>

RETAIL TRADE INDUSTRY

Establishments	2000	2008	Average	Jobs	2000	2008	Average
Total	911	1,043	977	Total	6,162	5,982	6,072
Noncommercial	no non-commercial in this industry			Noncommercial	no non-commercial in this industry		
Nonresident	6.6%	6.1%	6.4%	Nonresident	23.9%	28.1%	26.0%
Resident	93.4%	93.9%	93.6%	Resident	76.1%	71.9%	74.0%
Self employed (1)	28.2%	30.0%	29.1%	Self employed (1)	5.1%	6.8%	6.0%
Stage 1 (2-9)	61.8%	61.7%	61.8%	Stage 1 (2-9)	41.4%	45.9%	43.7%
Stage 2 (10-99)	9.4%	8.1%	8.7%	Stage 2 (10-99)	39.3%	41.0%	40.2%
Stage 3 (100-499)	0.6%	0.2%	0.4%	Stage 3 (100-499)	14.1%	6.3%	10.2%
Stage 4 (500+)	0.0%	0.0%	0.0%	Stage 4 (500+)	0.0%	0.0%	0.0%

Stages - Percent of Resident Establishments (average), Jobs (average), and Positive Job Growth
Douglas (OR) county Retail Trade industry 2000-2008



Source: Edward Lowe Foundation; <http://www.youreconomy.org>

ACCOMODATIONS AND FOOD SERVICE

Establishments	2000	2008	Average	Jobs	2000	2008	Average
Total	317	336	326	Total	3,917	3,731	3,824
Noncommercial	no non-commercial in this industry			Noncommercial	no non-commercial in this industry		
Nonresident	3.8%	3.0%	3.4%	Nonresident	9.4%	5.7%	7.6%
Resident	96.2%	97.0%	96.6%	Resident	90.6%	94.3%	92.4%
Self employed (1)	12.1%	15.6%	13.9%	Self employed (1)	1.0%	1.4%	1.2%
Stage 1 (2-9)	57.4%	60.4%	58.9%	Stage 1 (2-9)	21.7%	22.9%	22.3%
Stage 2 (10-99)	29.5%	23.6%	26.6%	Stage 2 (10-99)	50.9%	48.4%	49.6%
Stage 3 (100-499)	0.7%	0.0%	0.3%	Stage 3 (100-499)	5.8%	0.0%	2.9%
Stage 4 (500+)	0.3%	0.3%	0.3%	Stage 4 (500+)	20.6%	27.3%	23.9%

Stages - Percent of Resident Establishments (average), Jobs (average), and Positive Job Growth
Douglas (OR) county Accommodation and Food Services industry 2000-2008



Source: Edward Lowe Foundation; <http://www.youreconomy.org>

ARTS, RECREATION AND ENTERTAINMENT

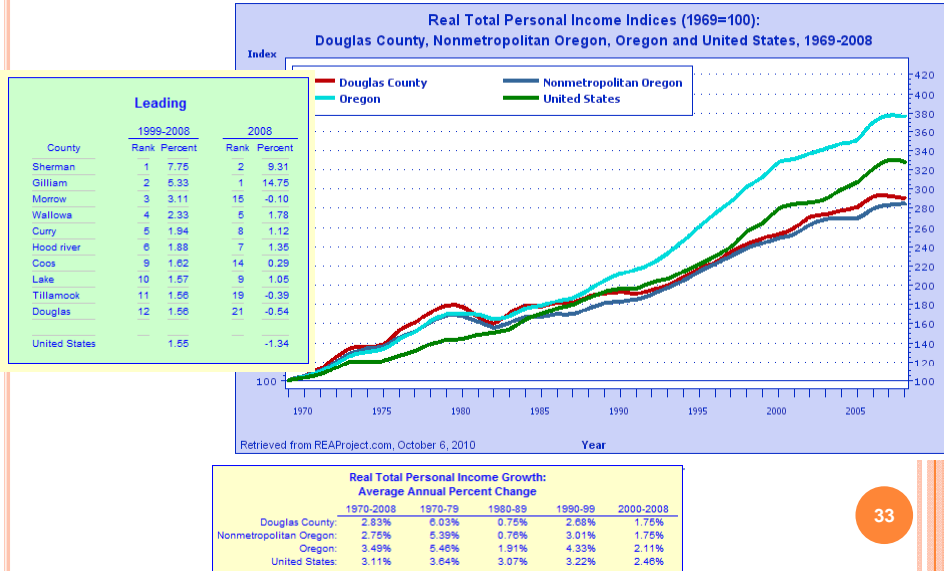
Establishments	2000	2008	Average	Jobs	2000	2008	Average
Total	119	139	129	Total	1,355	1,313	1,334
Noncommercial	5.9%	9.4%	7.6%	Noncommercial	1.8%	4.7%	3.2%
Nonresident	0.8%	0.7%	0.8%	Nonresident	3.0%	1.0%	2.0%
Resident	93.3%	89.9%	91.6%	Resident	95.3%	94.3%	94.8%
Self employed (1)	36.0%	41.6%	38.8%	Self employed (1)	3.1%	4.2%	3.6%
Stage 1 (2-9)	47.7%	48.8%	48.3%	Stage 1 (2-9)	14.9%	17.6%	16.2%
Stage 2 (10-99)	15.3%	8.8%	12.1%	Stage 2 (10-99)	23.9%	17.6%	20.8%
Stage 3 (100-499)	0.0%	0.0%	0.0%	Stage 3 (100-499)	0.0%	0.0%	0.0%
Stage 4 (500+)	0.9%	0.8%	0.9%	Stage 4 (500+)	58.1%	60.6%	59.3%

Stages - Percent of Resident Establishments (average), Jobs (average), and Positive Job Growth
Douglas (OR) county Arts, Entertainment, and Recreation industry 2000-2008



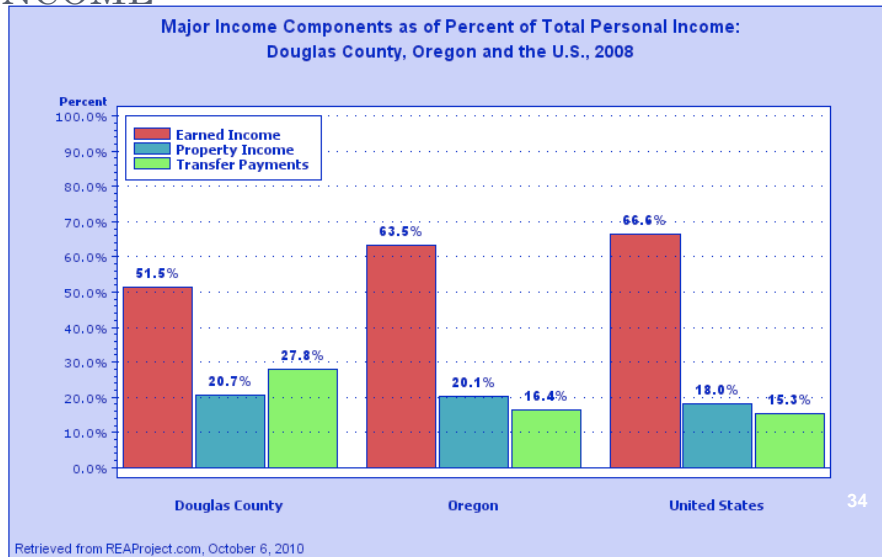
Source: Edward Lowe Foundation; <http://www.youreconomy.org>

TOTAL PERSONAL INCOME CHANGES



Source: US Bureau of Economic Analysis, www.oregon.reaproject.org

MAJOR COMPONENTS OF PERSONAL INCOME



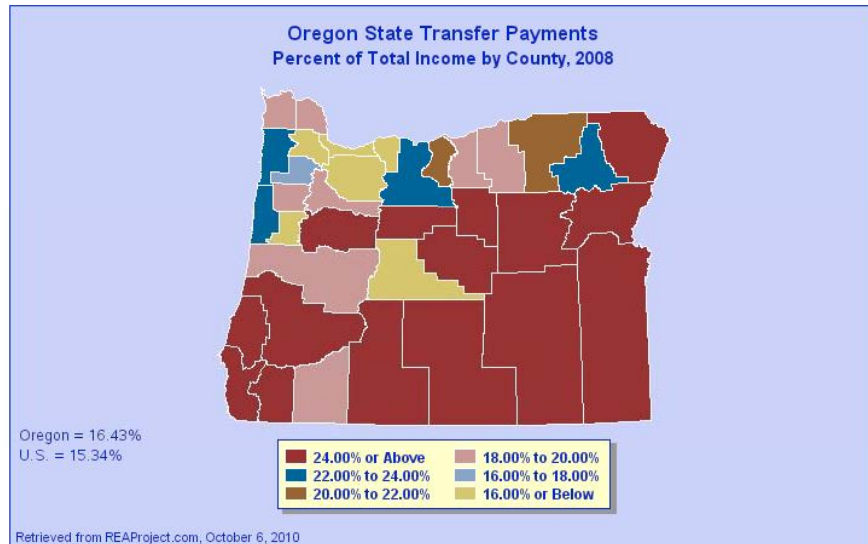
Source: US Bureau of Economic Analysis, www.oregon.reaproject.org

MAJOR COMPONENTS OF PERSONAL INCOME – EXPANSION OF TRANSFER PAYMENTS

- Top categories in transfer payments
 - Retirement 40.6%
 - Social Security Payments (38.4%)
 - Medical 35.8%
 - Medicare (22.9%)
 - Medicaid (12.7%)
 - Income Maintenance Benefits 7.9%
 - Food Stamps (2.5%)
 - Other (3.1%)
 - Supplemental Security Income (1.5%)

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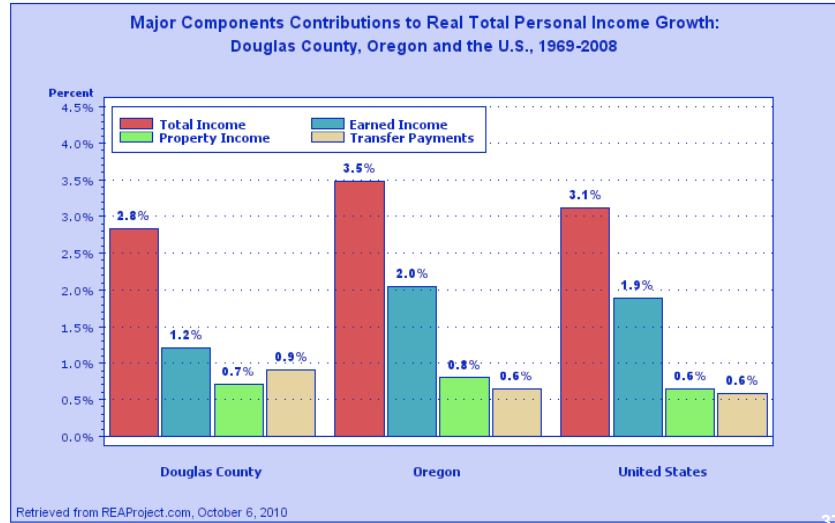
Source: US Bureau of Economic Analysis, www.oregon.reaproject.org



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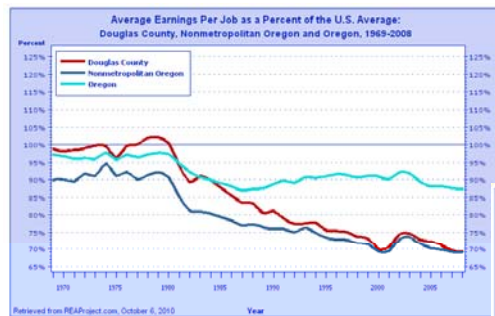
- Douglas County ranked 7th in transfer payments as a % of total income (27.8%)

Source: US Bureau of Economic Analysis, www.oregon.reaproject.org



- Average annual growth rate from 1969-2008

Source: US Bureau of Economic Analysis, www.oregon.reaproject.org



Source: US Bureau of Economic Analysis, www.oregon.reaproject.org

Changes in Average Earnings Per Job

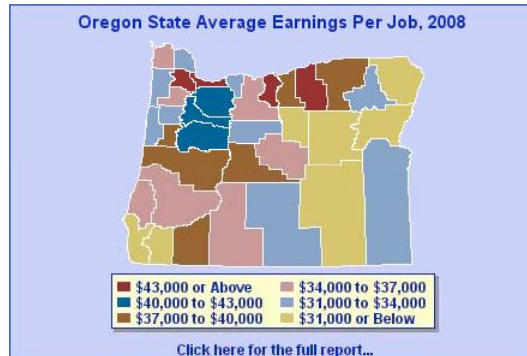


- 1969 Douglas had higher average earnings per job than the state average and other rural counties in Oregon
- Tracking Douglas to the US average, in the late 1970s the local population earned more on average
- Since 1980, average earnings as a percent of the US average have been in decline now stand at 70% and equal with rural Oregon
- Average earnings while on the rise until recently, offer residents only a slightly higher purchasing power than they held in 1969 and comparatively lower than state and national averages.

COMPARING AVG EARNINGS AND TOTAL INDUSTRY EARNINGS

2000 - 2008

- Total Industry Earnings Growth
 - 0.67% growth
 - Half of rural Oregon average
- Total Employment Growth
 - 0.49%
 - Less than ½ of rural western Oregon
 - 1/3 state average



	Real Total Industry Earnings Growth: Average Annual Percent Change				
	1970-2008	1970-79	1980-89	1990-99	2000-2008
Douglas County:	1.93%	2.53%	-0.55%	1.92%	0.67%
Nonmetropolitan Oregon:	2.04%	4.72%	-0.66%	2.70%	1.94%
Oregon:	3.20%	5.14%	1.05%	4.68%	1.81%
United States:	2.82%	3.35%	2.42%	3.32%	2.11%

	Employment Growth: Average Annual Percent Change				
	1970-2008	1970-79	1980-89	1990-99	2000-2008
Douglas County:	1.73%	3.97%	1.04%	1.30%	0.49%
Nonmetro Western Oregon:	1.90%	3.83%	0.86%	1.74%	1.09%
Oregon:	2.44%	3.92%	1.59%	2.68%	1.50%
United States:	1.80%	2.21%	1.88%	1.73%	1.32%



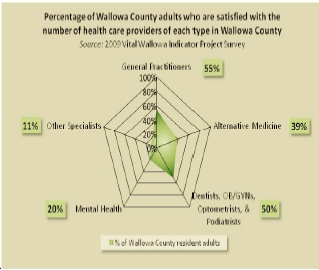
Source: US Bureau of Economic Analysis, www.oregon.reaproject.org

BRINGING DATA TO BEAR IN ECONOMIC DEVELOPMENT DECISION MAKING

- Benchmarking: as you look at different strategies what do these strategies contribute to the economy?
 - Similar areas
 - Areas slightly more advanced down a particular path of development
- Looking beyond job counts how can development impact other areas of society
 - What parts of our workforce and population will benefit and how?
 - Will this business increase our need for low income housing or for childcare? Does it improve services for our retired population?
- What types of development are likely to be most successful in this community and what do we want our community to look like?
- Track progress to aid in assessment
 - Community Vitality Project : see assessments for Tillamook and Willamette County organized by citizens
 - <http://www.tillamookfutures.org/vitalindicators.htm>

EXAMPLES FROM THE WALLOWA COMMUNITY VITALITY INDICATOR PROJECT



Goal 1.2 *We intentionally care for and nurture one another*


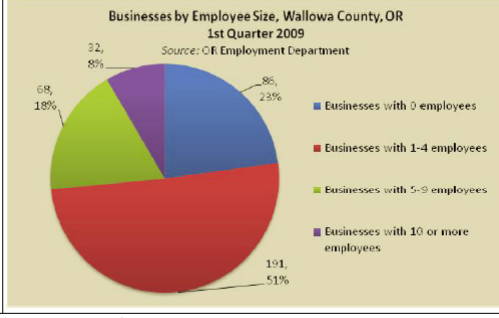
  3. Health Care Satisfaction	Satisfaction with Health Care Quality	
	<p>86% of Wallowa County adults who saw a Wallowa County health care provider in 2008-2009, were satisfied with quality of care they received</p> <p>Source: Vital Wallowa Indicator Project Survey, 2009</p>	<p>Target: 85%¹</p>
Satisfaction with Health Care Options		
<p>16% of Wallowa County adults delayed care because they were dissatisfied with local provider choices in 2008-2009</p>	<p>Target: <16%¹</p>	 <p>Percentage of Wallowa County adults who are satisfied with the number of health care providers of each type in Wallowa County Source: 2009 Vital Wallowa Indicator Project Survey</p>
Source: Vital Wallowa Indicator Project Survey, 2009		

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http://www.oregonexplorer.info/data_files/OE_topic/rural/documents/Wallowa%20County_Indicator_Summary_2-8-10.pdf

Goal 2.3 *In addition to carrying agriculture and ranching forward into the next generation, Wallowa County cultivates a balance of compatible locally-owned small businesses, which add to our diverse and innovative economy.*

	<p>15. Small & Large Business Health</p>	<p>Rate of change in # of Wallowa County small businesses (with 0-4 employees) in 2008: +6%</p>	<p>Target: +5%¹</p>
		<p>Rate of change in # of Wallowa County large businesses (with 20+ employees) in 2008: -16%</p>	<p>Target: >0%¹</p>
Source: Oregon Employment Department			

	<p>16. Employers by Size</p>	 <p>Businesses by Employee Size, Wallowa County, OR 1st Quarter 2009 Source: OR Employment Department</p> <ul style="list-style-type: none"> ■ Businesses with 0 employees ■ Businesses with 1-4 employees ■ Businesses with 5-9 employees ■ Businesses with 10 or more employees 	<p>Target: >377 total firms, 2009 percentage levels¹</p>
Source: OR Employment Department, 2009			

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http://www.oregonexplorer.info/data_files/OE_topic/rural/documents/Wallowa%20County_Indicator_Summary_2-8-10.pdf

EXAMPLES FROM THE WALLOWA COMMUNITY VITALITY INDICATOR PROJECT

Goal 1.5 *Our community is rich in year-round residents of young people and families who do not endure extreme economic disparity and who can carry the heritage of agriculture and ranching forward in the next generation.*

☹	9. Workforce Housing	Wallowa County's percentage of low-income renters who spent more than 30% of income on housing (housing cost-burdened) was 6% higher than Oregon's percentage in 2000 <i>Source: US Census, SF3, 2000; OR Housing & Community Service</i>	Target: 0% ¹
☺	10. Farm & Ranch Ownership	56% of farm or ranch owners (40+ acre parcels) were year-round County residents in 2009 <i>Source: Wallowa County Assessor's Office, 2009</i>	Target: -- ¹
☺	11. Seasonal Home-ownership	13% of housing units in Wallowa County were seasonal-use homes in 2000 <i>Source: US Census, SF3, 2000</i>	Target: 13% ¹

http://www.oregonexplorer.info/data_files/OE_topic/rural/documents/Wallowa%20County_Indicator_Summary_2-8-10.pdf

- For more information contact OSU Extension Social Demographer Lena Etuk lena.etuk@oregonstate.edu

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RESOURCES

- Data access – see slides for website addresses
 - Census data: Rural Community Explorer
 - Economic data: OLMIS and OR-REAP
 - Monthly indicators: OLMIS, County Monitor
 - Agricultural data: Oregon Agricultural Information Network
 - Commuting Data: Census LEHD On the Map
 - Establishment Data: County Business Patterns by Zip Code
 - Business stages and growth: Edward Lowe Foundation
- Human access
 - Local networks of engaged individuals
 - Oregon Employment Department
 - Regional Economist Brian Rooney Brian.T.Rooney@state.or.us
 - Workforce Analyst Annette Shelton-Tideman Annette.I.Shelton-Tideman@state.or.us
 - Universities
 - Private consultants

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DATA ACCESS: OREGON RURAL COMMUNITY INFORMATION SYSTEM

OSU Oregon State University

Catalog | Calendar | Find Someone | Maps | A-Z Index

Rural Studies Program

Migration & Rural Youth

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Welcome to the Rural Studies Program

The Rural Studies Program presents the Oregon Rural Community Information System

OREGON COUNTY MONITOR - A report for each county in Oregon that includes measures of families' ability to meet their basic needs.

OREGON REGIONAL ECONOMIC ANALYSIS PROJECT - A web-based program to create graphic trends analysis of local economic indicators and generate analysis of local employment growth.

OREGON RURAL COMMUNITIES EXPLORER - An online toolset that includes data and other information to increase understanding of rural issues including vitality and change in Oregon's rural communities.

RSP News & Publications

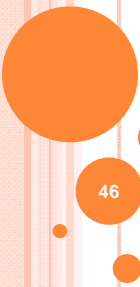
- Rural Studies Program Newsletter - Fall 2009
- Rural Studies Program Newsletter - Spring 2009
- Rural Studies Program Annual Report 2006-2009
- Rural Studies Program Annual Report 2007-2008
- Rural Studies Program Annual Report 2006-2007

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<http://ruralstudies.oregonstate.edu/>

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