



North Coast Regional Economic Recovery Team Economic Update

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Largest differences in rank are in natural resources, leisure and hospitality, and manufacturing.

Private Industry Rank by Employment, 2020

| Clatsop | Columbia | Tillamook |
|-------------------------------------|-------------------------------------|-------------------------------------|
| Leisure and hospitality | Trade, transportation and utilities | Manufacturing |
| Trade, transportation and utilities | Manufacturing | Trade, transportation and utilities |
| Education and health services | Education and health services | Education and health services |
| Manufacturing | Leisure and hospitality | Leisure and hospitality |
| Construction | Professional/business services | Natural resources and mining |
| Professional/business services | Construction | Construction |
| Other services | Other services | Professional/business services |
| Financial activities | Financial activities | Other services |
| Natural resources and mining | Natural resources and mining | Financial activities |
| Information | Information | Information |

Source: Oregon Employment Department



Clatsop County Employment* and Wages, 2020

| Industry | Units | Jobs | Wages | Annual Wage |
|-------------------------------------|-------|--------|----------------|-------------|
| Total all ownerships | 1,788 | 17,365 | \$ 741,329,002 | \$42,691 |
| Total private coverage | 1,701 | 14,901 | \$ 614,687,024 | \$41,251 |
| Total all government | 87 | 2,464 | \$ 126,641,978 | \$51,397 |
| Leisure and hospitality | 318 | 4,002 | \$ 102,079,710 | \$25,507 |
| Trade, transportation and utilities | 330 | 3,372 | \$ 124,192,751 | \$36,831 |
| Education and health services | 249 | 2,437 | \$ 133,790,829 | \$54,900 |
| Total local government | 47 | 1,929 | \$ 94,614,316 | \$49,048 |
| Manufacturing | 56 | 1,767 | \$ 112,386,665 | \$63,603 |
| Construction | 192 | 1,008 | \$ 50,612,129 | \$50,210 |
| Professional and business services | 176 | 719 | \$ 27,509,202 | \$38,260 |
| Other services | 152 | 575 | \$ 14,924,812 | \$25,956 |
| Financial activities | 130 | 563 | \$ 27,568,584 | \$48,967 |
| Total state government | 24 | 330 | \$ 20,003,760 | \$60,617 |
| Natural resources and mining | 43 | 318 | \$ 14,405,754 | \$45,301 |
| Total federal government | 16 | 206 | \$ 12,023,902 | \$58,368 |
| Information | 37 | 131 | \$ 6,792,670 | \$51,852 |

Source: Oregon Employment Department

*Excludes self employed and some agricultural jobs.



Columbia County Employment* and Wages, 2020

| Industry | Units | Jobs | Wages | Annual Wage |
|-------------------------------------|-------|--------|----------------|-------------|
| Total all ownerships | 1,384 | 11,212 | \$ 503,230,896 | \$44,883 |
| Total private coverage | 1,314 | 9,345 | \$ 398,975,045 | \$42,694 |
| Total all government | 70 | 1,867 | \$ 104,255,851 | \$55,841 |
| Trade, transportation and utilities | 212 | 2,241 | \$ 92,159,083 | \$41,124 |
| Manufacturing | 59 | 1,666 | \$ 95,969,394 | \$57,605 |
| Total local government | 54 | 1,615 | \$ 90,244,992 | \$55,879 |
| Education and health services | 325 | 1,549 | \$ 57,506,966 | \$37,125 |
| Leisure and hospitality | 106 | 1,108 | \$ 20,885,771 | \$18,850 |
| Professional and business services | 150 | 907 | \$ 38,489,921 | \$42,437 |
| Construction | 154 | 669 | \$ 38,131,720 | \$56,998 |
| Other services | 122 | 398 | \$ 10,397,733 | \$26,125 |
| Financial activities | 99 | 390 | \$ 21,648,756 | \$55,510 |
| Natural resources and mining | 40 | 354 | \$ 20,052,384 | \$56,645 |
| Total state government | 8 | 172 | \$ 9,677,020 | \$56,262 |
| Total federal government | 8 | 79 | \$ 4,333,839 | \$54,859 |
| Information | 21 | 48 | \$ 2,747,285 | \$57,235 |

Source: Oregon Employment Department

*Excludes self employed and some agricultural jobs.



Tillamook County Employment* and Wages, 2020

| Industry | Units | Jobs | Wages | Annual Wage |
|-------------------------------------|-------|-------|----------------|-------------|
| Total all ownerships | 1,029 | 9,114 | \$ 406,408,625 | \$44,592 |
| Total private coverage | 923 | 7,309 | \$ 311,466,801 | \$42,614 |
| Total all government | 106 | 1,805 | \$ 94,941,824 | \$52,599 |
| Manufacturing | 33 | 1,424 | \$ 79,742,941 | \$55,999 |
| Trade, transportation and utilities | 156 | 1,405 | \$ 47,610,716 | \$33,887 |
| Total local government | 70 | 1,357 | \$ 67,160,187 | \$49,492 |
| Education and health services | 161 | 1,236 | \$ 59,887,734 | \$48,453 |
| Leisure and hospitality | 136 | 1,194 | \$ 30,054,639 | \$25,171 |
| Natural resources and mining | 82 | 734 | \$ 30,550,045 | \$41,621 |
| Construction | 97 | 402 | \$ 25,008,479 | \$62,210 |
| Professional and business services | 87 | 377 | \$ 20,003,288 | \$53,059 |
| Total state government | 20 | 315 | \$ 20,111,695 | \$63,847 |
| Other services | 86 | 299 | \$ 7,858,418 | \$26,282 |
| Financial activities | 56 | 175 | \$ 8,329,664 | \$47,598 |
| Total federal government | 16 | 133 | \$ 7,669,942 | \$57,669 |
| Information | 14 | 46 | \$ 1,772,949 | \$38,542 |

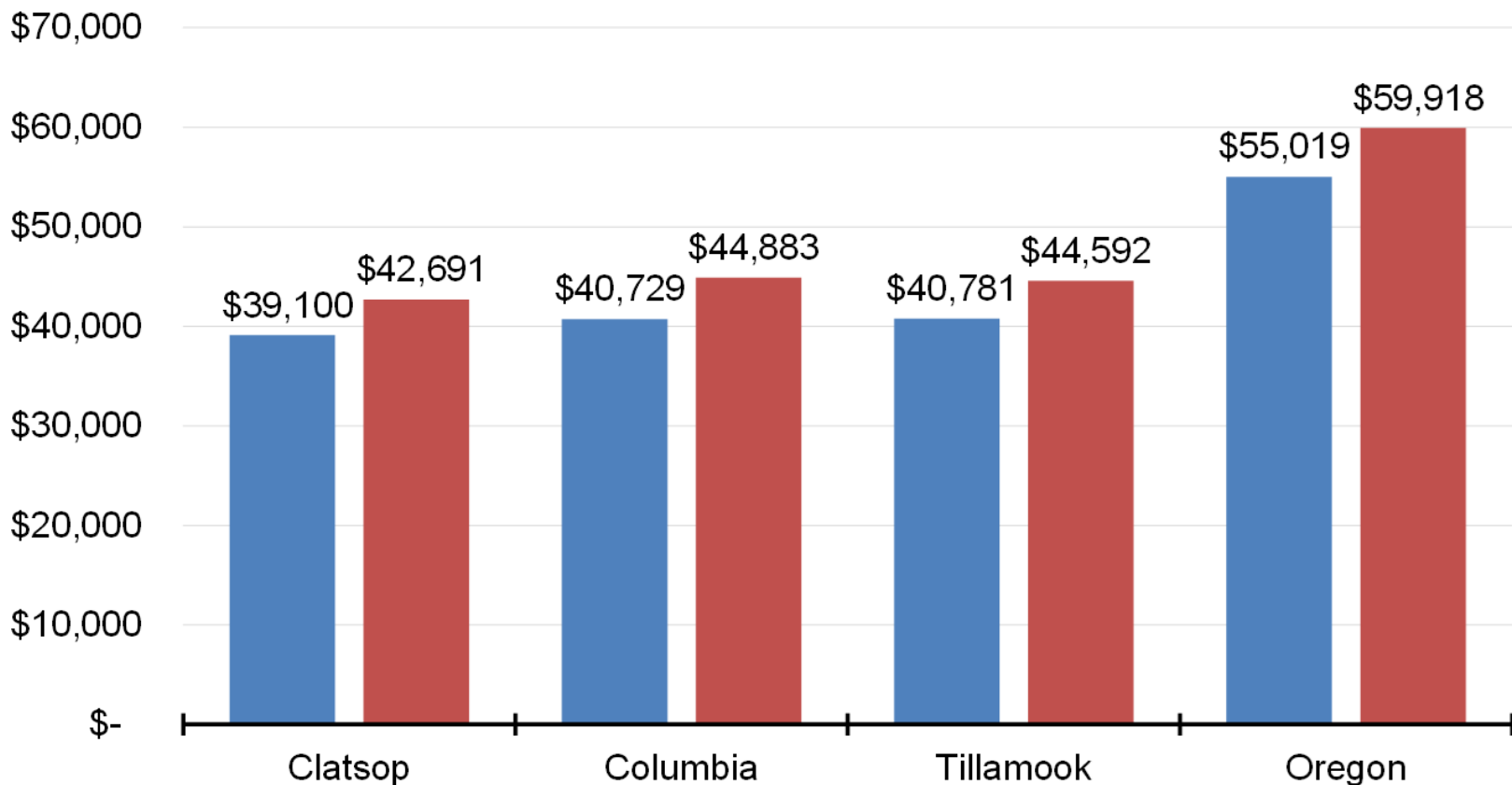
Source: Oregon Employment Department

*Excludes self employed and some agricultural jobs.

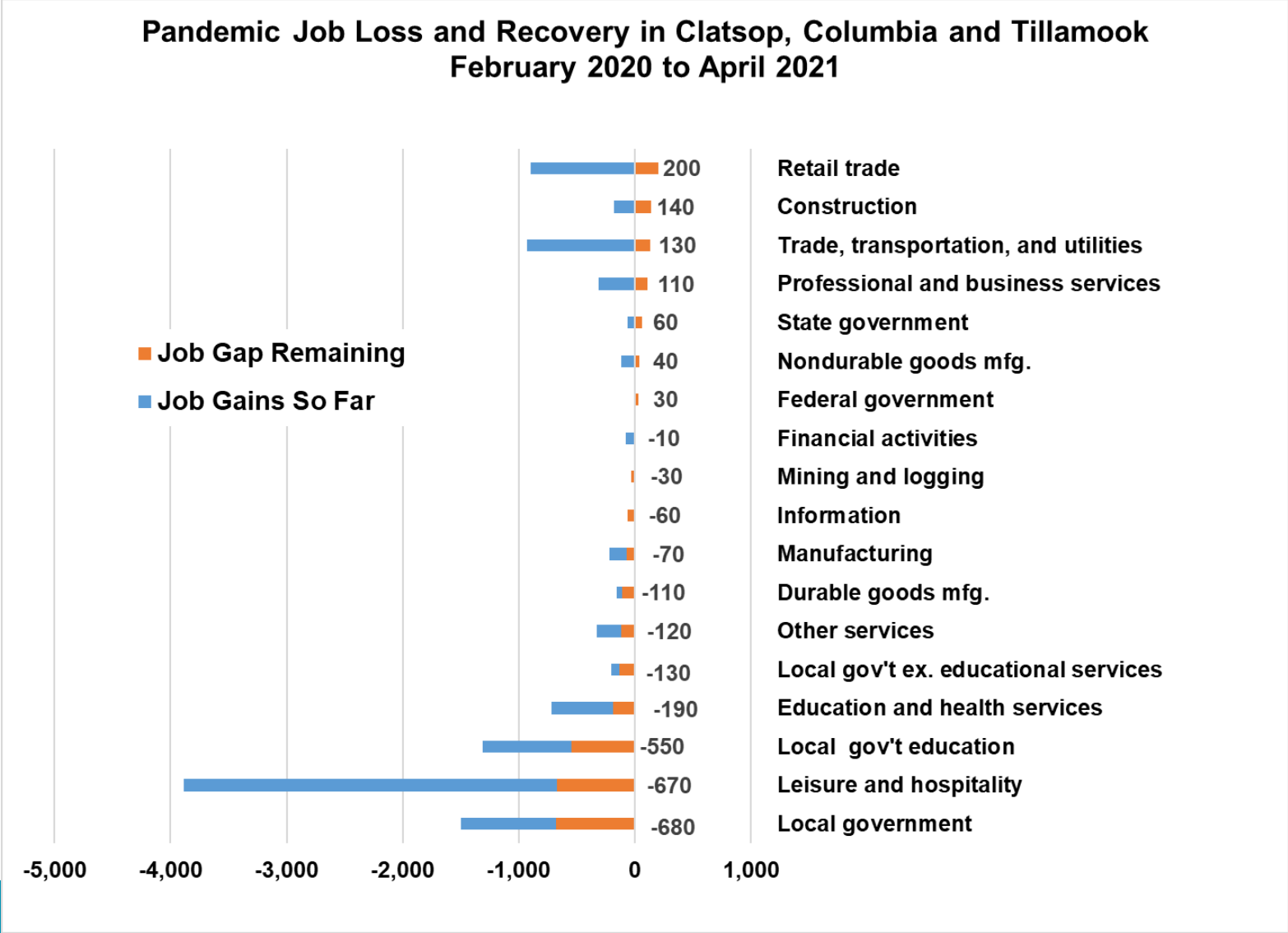


Average Wages in NW Oregon Counties Rose Faster Than Oregon's Statewide; Still Well Below State's

■ 2019 ■ 2020



The three counties are still down 1,360 (-3.4% of total) nonfarm jobs from February 2020.



But the region remains 2,300 jobs below “normal” (April 2019).

Clatsop, Columbia, Tillamook Counties Total Nonfarm Employment



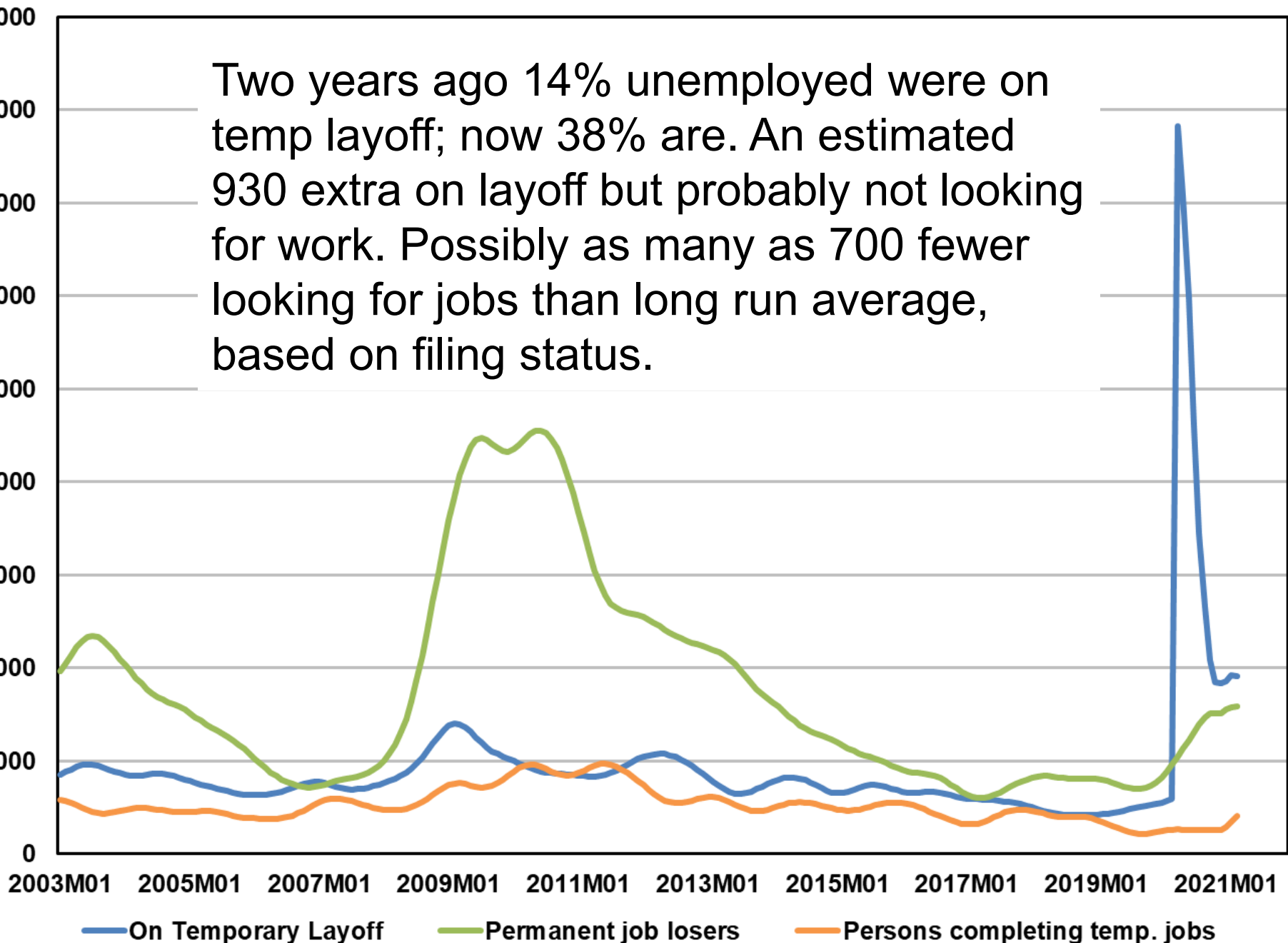
Job growth slowed in April.

- In March 220 jobs were expected and the region added 780.
- In April 730 jobs were expected and the region added 390.

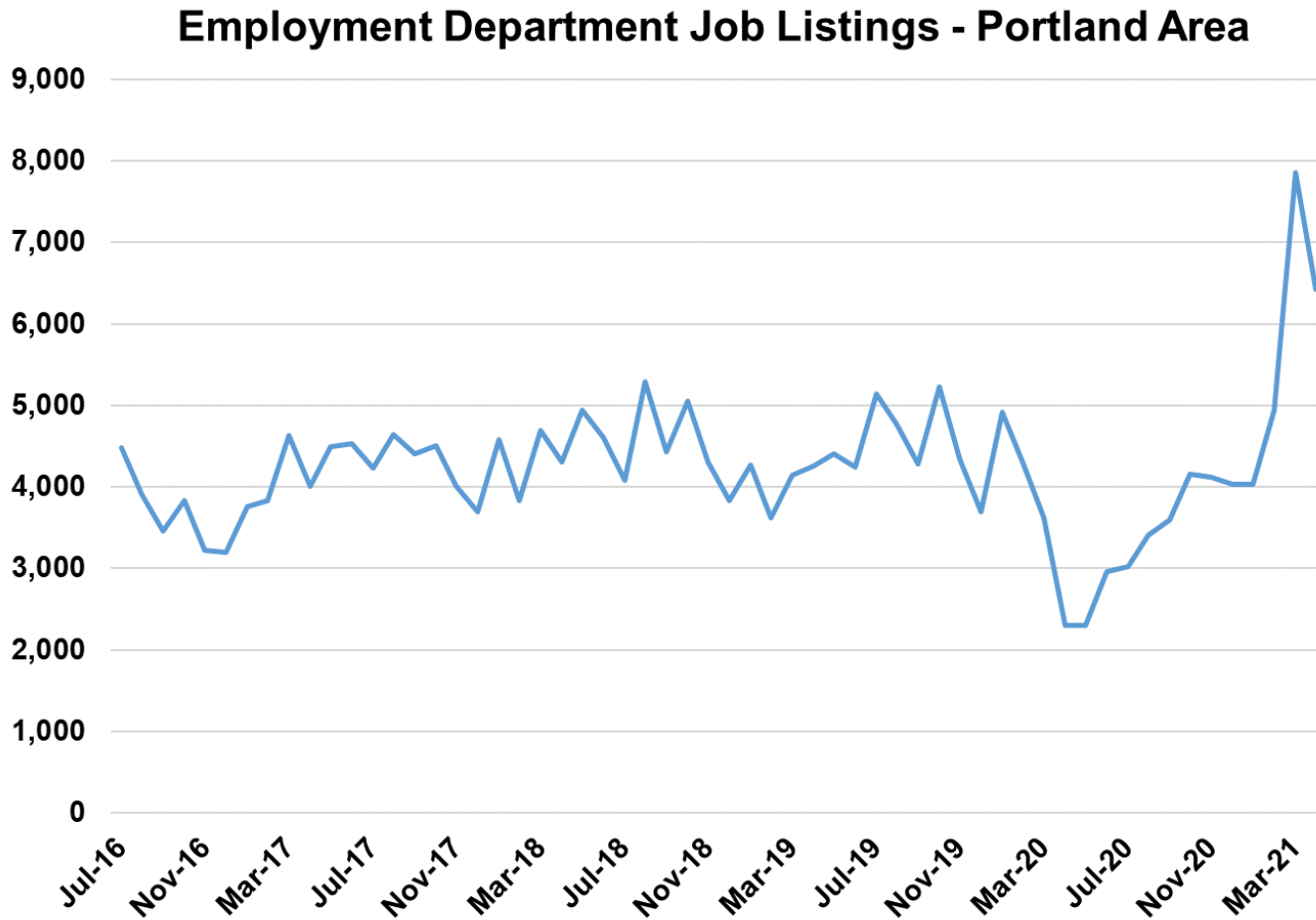
- Regional April unemployment rate was 6.8%. Long-run average is 6.8%.
- Long-run average unemployment is 3,651. April had 3,862, so about 210 “extra” unemployed. But...

Oregon Job Losers by Reason [Trend]

Two years ago 14% unemployed were on temp layoff; now 38% are. An estimated 930 extra on layoff but probably not looking for work. Possibly as many as 700 fewer looking for jobs than long run average, based on filing status.



Job listings in our Portland offices nearly doubled from January to March.



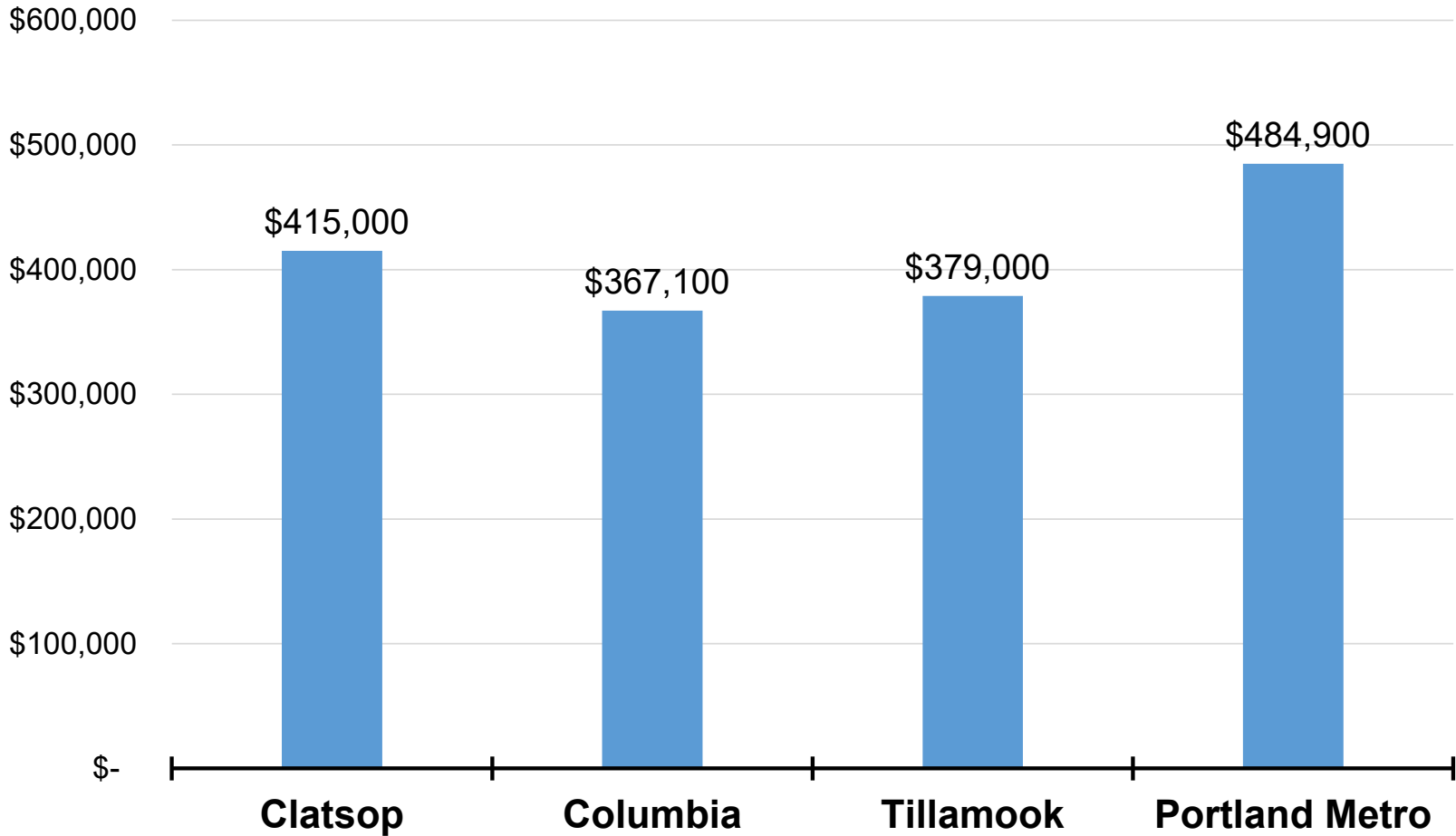
Source: Oregon Employment Department



Potential Factors Creating Worker Shortage

- Temporary layoff – not available for other employment
- PUA/Self employment may boost unemployment response
- Lack of in-person schooling
- High-risk medical condition of themselves/family member
- Infected or exposed to COVID-19
- Unemployment insurance benefit enhancement/extensions
- Increased risk of verbal abuse in customer-facing jobs regarding masks and social distancing
- **Lack of workforce housing**
- **Lack of child care**

Median Sales Price Has Grown by 20% in North Coastal Counties Year-Over-Year, 17% in Portland Metro

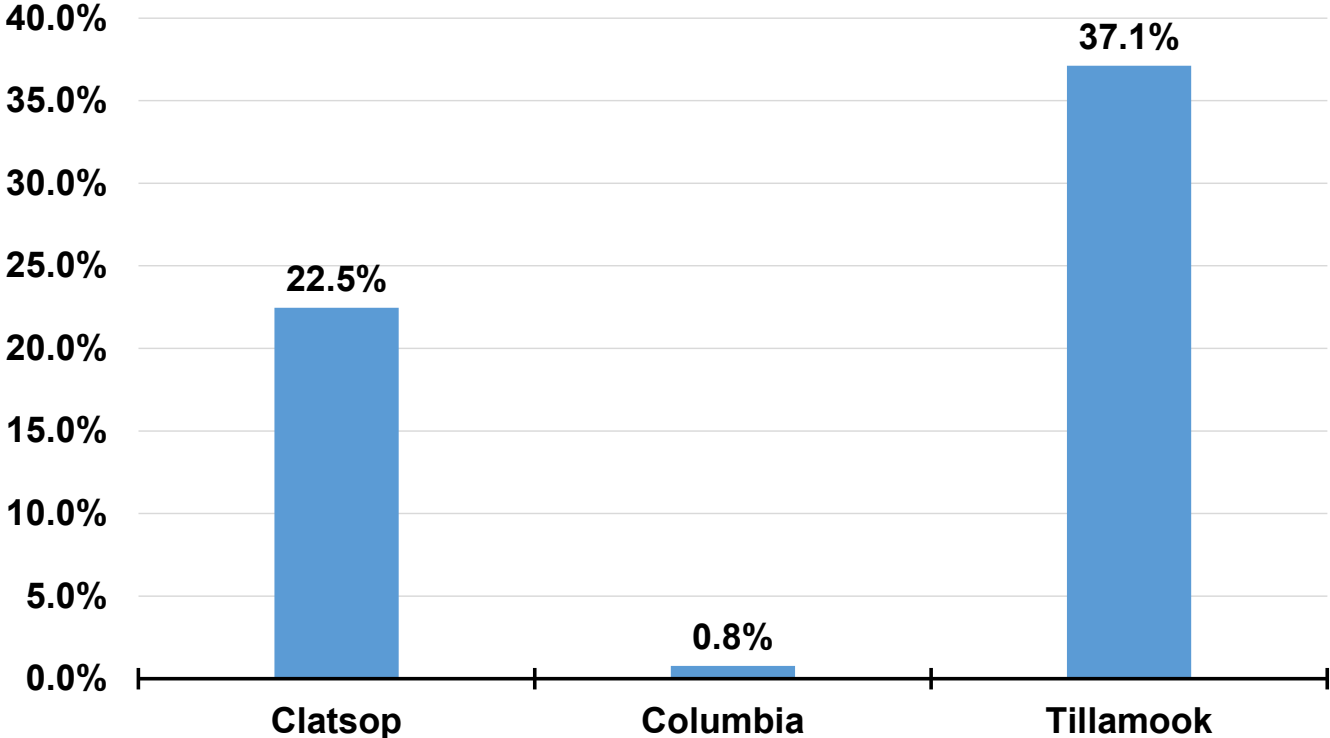


Source: RMLS Market Action Report, April 2021 shows 2021 year-to-date residential housing data.



Coastal Counties Have Large Shares of Housing Unavailable for Residents

Share of Total Housing Units Vacant for Seasonal, Recreational or Occasional Use

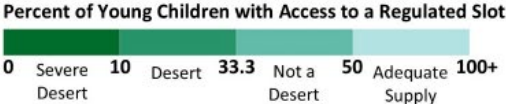
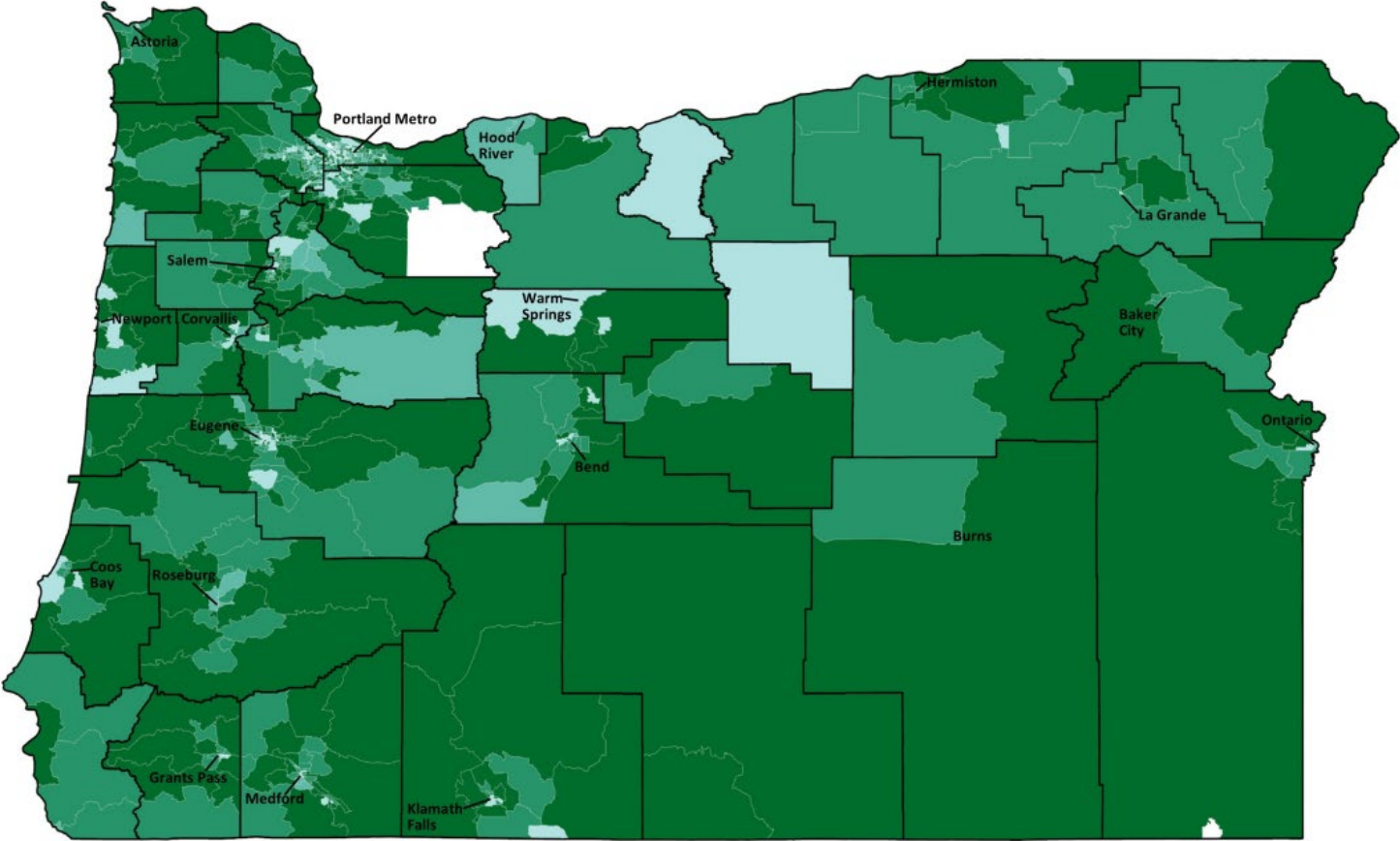


Source: U.S. Census American Community Survey 2019 5-year estimates.



Northwest Oregon Has Severe Shortage of Child Care

Map 1: Percent of Young Children with Access to a Regulated Child Care Slot



Data Information: Access to child care is calculated by taking the number of regulated child care slots for young children age 0-5 as of January 2018 (Estimated Supply of Child Care in Oregon, Oregon Child Care Research Partnership, Oregon State University) and dividing it by the population of children in the community who fall in the age group (2014-2108 ACS 5-year estimate, Table B09001).



For more economic information, call:

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Columbia Pacific Employment and Wages, 2019

| Industry | Employment | Avg. Wa |
|--------------------------------------------------|------------|----------|
| Total | 55,361 | \$40,532 |
| Accommodation and Food Services | 8,924 | \$23,002 |
| Manufacturing | 7,532 | \$53,747 |
| Retail Trade | 7,007 | \$28,868 |
| Health Care and Social Assistance | 7,000 | \$43,922 |
| Educational Services | 4,970 | \$47,220 |
| Construction | 3,470 | \$52,005 |
| Agriculture, Forestry, Fishing and Hunting | 2,823 | \$41,691 |
| Other Services (except Public Administration) | 2,322 | \$23,646 |
| Public Administration | 2,193 | \$57,184 |
| Admin., Support, Waste Mgmt. Services | 1,899 | \$32,233 |
| Transportation and Warehousing | 1,630 | \$43,758 |
| Professional, Scientific, and Technical Services | 1,061 | \$52,876 |
| Finance and Insurance | 928 | \$54,991 |
| Arts, Entertainment, and Recreation | 919 | \$24,169 |
| Wholesale Trade | 831 | \$59,552 |
| Real Estate and Rental and Leasing | 691 | \$32,370 |
| Utilities | 438 | \$93,074 |
| Information | 409 | \$42,897 |
| Management of Companies and Enterprises | 182 | \$53,428 |
| Mining, Quarrying, and Oil and Gas Extraction | 118 | \$72,456 |
| Unclassified | 14 | \$45,188 |

About 8,000
(14.5%) of
these jobs are
public sector.