ECONOMIC RESILIENCE

LANE COUNTY

Lane County is located in Oregon's Willamette Valley. The largest cities within the county are Eugene (County Seat), Springfield, Cottage Grove, and Florence. The local economy has shifted from timber and agriculture towards service-oriented industries. Lane County is home to the University of Oregon, and Northwest Christian University, attracting students and talent to the region.

Quick Facts

Population	**381,365**
Population as % of State Total	**9%**
Economic Diversity Score (Hachman Index)	**0.861 (/1.0)** Highest of 36 Oregon Counties

Top 3 Industries by employment and Average Wages

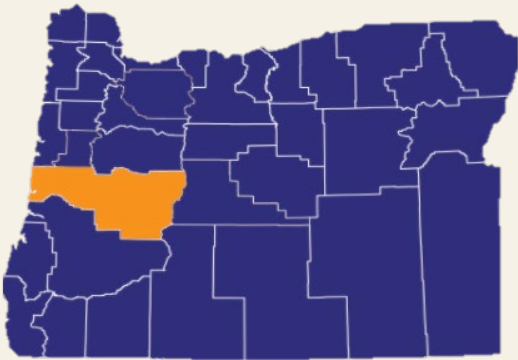| #1 16.5% Health Care & Social Assistance $48,953	#2 13.0% Accommodation and Food Services $17,647	#3 9.9% Retail Trade $26,891

$43,783
Average Annual Wages in Lane County
(all industries/ownerships)

Stronger Signals of Resilience

- Lane County's educated workforce is a positive indicator of economic resilience
- Job growth is across diverse industries and wages are competitive in comparison to the state
- An established network of education, training and employment resources and services exists

Weaker Signals of Resilience

- Higher wage industries are shrinking and lower wage industries that require a less educated workforce are growing
- The housing inventory in Lane County is prominently older and home values are more than 30% lower than the state average. The cost of living and limited availability of housing in the region are negative signals for economic resilience.

	US	State	County
Median Household Income	$60,293	$59,393	$49,958
Median Age	37.9	39.2	39.4
% of Residents with at least High School Degree	87.6%	90.5%	91.5%
% of Renters spending 30% or more of income on housing	47%	49%	53%

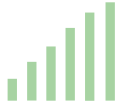| City	Population
Eugene & Springfield	266,806
Florence	10,912
Cottage Grove	10,645
Florence	10,912
Junction City	6,821
Creswell	6,041
Veneta	4,906
Oakridge	3,998

Measuring Resilience

Gauging Resilience: Signal Strength Measures

Area of concern for a resilient economy. **Data signals limited strength.**

Area for improvement to support a resilient economy. **Data signals opportunity for added resilient measures.**

Area contributes to economic resilience for the community. **Data signals a resilient position.**

This profile measures resilience in the County using the data detailed in the **8 Questions Framework Introduction**. Some data help answer more than one question, and most questions are answered using a combination of datasets. Measuring economic resilience is challenging because many factors impact a community's ability to recover from a shock. The elements that contribute to a more resilient community are varied, and often independently managed. It is entirely possible for a community to demonstrate economic strengths and vulnerabilities at the same time.

This framework measures the "signal strength" associated with each dataset. Within every question, the datasets with the weaker signals should be noted and further investigated. Communities should aim to have full-power resilience signals for most datasets and may want to concentrate efforts where there is limited signal strength.

Terms Used in Measuring Resilience

Term	Defined as
Age Dependency Ratio	Determined by measuring the number of dependents (young and old) in a population divided by the number of working-age people. This data point describes the level of pressure on an economy from supporting populations that are typically less active in the labor market.
Average Wages	Average of the wages earned in a particular job or industry occupation. Wages include tips, commissions, bonuses, vacation, and holiday pay, but do not include benefits.
Complete Kitchen / Complete Plumbing	Homes that have a sink with faucet, a stove or range, and a refrigerator meet the criteria for having complete kitchen facilities. Homes that have hot and cold running water, a flush toilet and a bathtub or shower meet the criteria for having complete plumbing facilities.
Cost-burdened / Severe cost-burdened Households	Households that pay more than 30% of their income for housing are considered cost-burdened. Households that pay more than 50% of their income for housing are considered severely cost-burdened.
Fastest Growing Industries (& wages)	Private industries with the highest percentage of total employment, as measured by Oregon Employment Department (OED).
Jobs to Homes Ratio	Used to examine the proportions of residents, jobs, and services in urban areas. The ratio is measured by dividing the total employment by total occupied housing units.
Median Household Income	Median of households' income earned in the past 12 months within a geography. Income includes the income of the householder and all other individuals 15 years and over in the household (whether or not they are related to householder).
Population Growth Rate	This rate expresses the percent change in population over a given time period.
Vacancy Rate	The proportion of housing units that are not seasonal or for sale that are not occupied.

What Indicates Resilience?

1	**Does the economy have diverse and well-paid jobs?**	Diversified economies are more resilient. **+** A distribution of jobs in higher-wage industries indicates more economic resilience **−** A concentration of jobs in a single industry indicates less economic resilience
2	**What is the projected future of major employment industries in the region and nationally?**	Industries that are less subject to volatility are more resilient. **+** A distribution of employment across industries that will likely remain stable indicates greater economic resilience **−** A concentration of employment in industries that are regulated, taxed, or that rely on natural resources introduces more risk for economic resilience
3	**What is the age breakdown of residents?**	A mix of young, working, and older populations is indicative of a more resilient economy. **+** Populations that are active in the labor force promote economic resilience **−** An aging population threatens economic resilience
4	**Do people live and work in the community?**	In communities where people live and work, the local economy is more active and independent, and therefore more resilient. **+** Mix of housing types and costs indicates greater economic resilience **−** Limited affordable housing options and major commuter outflows indicates less economic resilience
5	**How has the population grown in the last decade and what is predicted for the next 30 years?**	Growing populations indicate economic opportunities and resilience. **+** Steady and continuous growth indicates greater economic resilience **−** Sharp inclines and declines in populations indicate less economic resilience
6	**Are residential homes able to withstand a natural hazard or weather incident?**	Newer homes are more likely to have been constructed to withstand natural hazards and weather incidents. Older homes and manufactured homes may be more vulnerable to damages and/or more difficult to repair. **+** A sufficient supply of newer housing stock (built after 1970) indicates economic resilience **−** Limited newer housing stock and a decline in homebuilding over the last decade indicates less economic resilience
7	**What level of education attainment and earnings are residents reaching?**	Residents with advanced or specialized degrees have higher earning potential. Regions that have choices for advanced education (trade schools, community colleges, four-year colleges, and universities) are better positioned to support the training of local residents. **+** Higher percentage of residents with advanced or specialized degrees indicates greater economic resilience **−** Lower percentage of residents with advanced or specialized degrees indicates less economic resilience
8	**Do residents have access to health and wellness facilities?**	Communities with health and wellness facilities are more resilient than communities that lack these facilities. People with health insurance contribute to a more resilient economy by reserving scarce public health resources for those most in need. **+** Populations that are mostly insured and mostly located near health care facilities indicates greater economic resilience **−** Populations that have lower insurance rates and that are located farther from health care facilities indicates less economic resilience

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1. Does the economy have diverse and well-paid jobs?

| Data to Answer the Question		Results
Employment Data Source: QCEW + Oregon Employment Department (OED)	Resilient economies are not predominated by low-wage industries. **Average Annual Wages 2018** Oregon $53,053 Lane County $43,783 **Industry with Highest Employment** Wages % of Total Emp. 1. Healthcare & Social Asst. $48,953 17% 2. Retail Trade $29,899 13% 3. Accommodation & Food Services $18,635 10%	
Hachman Index Source: Oregon Employment Department (OED)	The Hachman Index is a measure of economic diversity. Lane County 0.861 Highest of Oregon's Counties (2019)	
Income Earned Source: ACS (2018)	Do people earn an equivalent income in Lane County compared to other parts of the state? Median Household Income / % of State Median Household Income **Lane County** **$49,958** **84.1%** **Oregon** **$59,393** Benton County $58,655 98.8% Lincoln County $46,061 77.6% Linn County $52,097 87.7%	

The top 3 industries in Lane County pay less, on average, than the state's median household income. Jobs in Health Care and Social Assistance are projected to grow, and jobs in the higher-paying Information industry are projected to shrink. It is worth noting that Retail Trade accounts for 13% of jobs and that the average earnings for Retail Trade is less than half of the state's median household income, suggesting that there are a lot of people working in lower paying retail trade jobs. Each of the top three industries account for less than 20% of the total employment, meaning that there is employment diversity and less vulnerability from an industry-specific disruption.

Data Definitions & Thresholds				
Employment Data	Of the 3 fastest growing industries, how many account for 20% or more of total area employment?	3	1-2	0
Economic Diversity	The Hachman Index is a measure of economic diversity. Using indicators such as gross domestic product (GDP) or employment, the index measures the mix of industries present in a particular region relative to a (well-diversified) reference region.	0-0.33	0.34-0.66	0.67-1.0
Income Earned	Median household income in the County as a percentage of state median income.	Less than 60%	60%-80%	More than 80%

2. **What is the projected future of major employment industries in the region and nationally?**

Diversified economies are more resilient. Regions that have a concentration of jobs in fewer industries are less resilient.

Data to Answer the Question		Results
Employment Data Source: QCEW	From 2010-2019, Lane County has seen a decrease in higher-wage jobs in industries like Information Federal Government and Wood Product Manufacturing. In the same period, 30% of the County's job growth has occurred in Food & Drink services which provides significantly lower annual wages than the county and state median household incomes. In Lane County, there is diversity in the employment sectors which is a positive indicator of economic resilience. Recent trends in job growth signal a rise in lower-wage industries and fewer higher-wage employment opportunities for Lane County residents. **Fastest Growing** Wages 1. Construction $52,687 2. Health care & social assistance $48,953 3. Food services & drinking places $18,233	
Current Events and National Trends Source: Various	In Lane County, the employment sectors are diverse, but there is economic vulnerability when job growth is aligned with lower-wage industries.	

Data Definitions & Thresholds				
Employment Data	Of the 3 fastest growing industries, how many offer wages above, or equivalent to, average wages in the county?	0	1-2	3
Current Events and National Trends	Articles that discuss growing and shrinking industries in Oregon may offer insights into potential economic and employment related risk.	News and Trends suggest industries will not prosper in the future	Nothing Noteworthy	News and Trends suggest industries are growing (regionally, nationally, globally)

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3. What is the age breakdown of residents?

Communities that are resilient have a mix of younger and older populations, and a growing number of working-age residents. Higher concentrations of older or younger populations require more services from the public, particularly during an economic disruption.

Data to Answer the Question		Results
Population characteristics Source: ACS (2018)	The median age of Lane County residents is 39.4, consistent with the state average (39.2). The age breakdown in Lane County is also similar to the state trends, with 18% of the population over the age of 65.	
Workers over 55 stats Source: OED	25% of Lane County's total population are over 55 years old and currently working (compared to 23% at the state level).	
Age dependency ratio Source: ACS (2018)	The age dependency ratio for Lane County is 61.6, close to the state's ratio (60.6), but suggesting some economic pressure.	

Data Definitions & Thresholds				
Population characteristics	Median Age	Over 50	40-50	Under 40
Workers over 55 stats	Percentage of population of people over 55 and employed full-time When the workforce is relying on an aging population it may be less sustainable.	More than 30%	15%-30%	Less than 15%
Age dependency ratio	The dependency ratio is the number of dependents in a population (under-18 and over-65) divided by the number of working-age (18-64) people, multiplied by 100. This data point describes the level of pressure on an economy from supporting the portions of the population least likely to be working.	More than 65.0	50.0-65.0	Less than 50.0

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4. Do people live and work in the community?

If people live close to where they work, productive time is not wasted on commuting and employment is more accessible during infrastructure disruptions. Communities that provide housing and employment options to residents of all income-levels are more resilient during a shock to the economic landscape.

Data to Answer the Question		Results
Housing Data Source: ACS (2018)	The housing inventory in Lane County includes a mix of single-family, multi-unit, and mobile homes. About 67% of housing inventory is single-family, 24% is attached and multi-unit, and 9% mobile homes, similar to the state breakdown. The vacancy rate in Lane County at 2%, about the same as at the state level. Housing costs and availability are of concern.	
Cost of Living vs Median Household Income Source: ACS (2018)	In Lane County, 53% of residents who rent and 38% of all residents are cost-burdened. In comparison, almost 50% of renters and 34% of all residents in the state are cost-burdened, so the situation is somewhat worse in Lane County.	
Commuting Patterns Source: ACS (2018), On the Map (2019)	In Lane County, 77% of people live and work within the county. About the same proportion of people drive to work than the state average (81%), and more people walk and bicycle than state average (9% v. 6%). The average commute time is 19 minutes.	

Data Definitions & Thresholds				
Housing and Employment Data	Jobs to Homes Ratio	Less than 0.75	More than 1.5	0.75-1.5
Cost of Living	Vacancy Rate	Less than 2.25%, More than 7%	2.25%-4.49%	4.5%-7%
	Percentage of households spending more than 30% of their income on housing (known as cost-burdened)	More than 25%	20-25%	Less than 20%
Commuting Patterns	Average commuting time	More than 26 min	20 min - 26 min	Less than 20 min
	Percentage of population that commute via walking, bicycling, or public transportation	Less than 5%	5%-10%	More than 10%
	Percentage of population that live and work in the county.	Less than 50%	50-75%	More than 75%

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5. **How has the population grown in the last decade and what is predicted for the next 30 years?**

Populations in decline signal a weaker (less resilient) economy. People often move to seek better employment or housing opportunities. A declining population is indicative of changing development/ settlement patterns and loss of potential workforce.

Data to Answer the Question		Results
Population Growth Rate Source: ACS (2018)	Lane County accounts for 9% of the state's population and has increased by 5% between 2008-2018. This increase in population is fairly consistent, although slightly lower, than the state's population growth (6.4%). Lane County's total population grew by about 50% between 1975 and 2014. Following economic and population declines in the 1980's, the county has experienced consistent population growth, averaging just less than one percent per year.	
Population Forecasts Source: PSU	According to PSU, net in-migration of younger school-age persons and net out-migration of younger to middle-aged individuals will persist throughout the forecast period (2017-2067). Lane County's total population is forecast to increase by 42% (2017-2067) with the highest growth rate — almost 1% percent per year — occurring in the near-term (2015-2030). Cottage Grove is expected to have the fastest growth rate in Lane County between 2015-2035.	

Data Definitions & Thresholds				
Past Population Data	Percentage change in population in the past 10 years	Less than 1.5%	1.5-3%	More than 3%
Population Forecasts	Forecasts for population trends and net migration over the next 30 years relate to the economic drivers that attract and/or retain a growing population.	Declining	No significant Growth or Decline	Growing

6. Are residential homes able to withstand a natural hazard or weather incident?

Newer homes are more likely to have been constructed to withstand natural hazards and weather incidents. Older homes and manufactured homes may be more vulnerable to damages and/or more difficult to repair. Homes without plumbing, electricity or phone services are at a greater risk during an emergency. The capacity to recover quickly from a shock is greater when people (the workforce) are not displaced.

Data to Answer the Question		Results
Housing Data Source: QCEW	37% of housing in Lane County was built before 1970, higher than the state overall (34%). Homes, on average are older in Lane County than they are in Oregon. Only about 4% of the housing in Lane County were built in the last decade.	
	Mobile homes make up about the same portion of the housing stock as the state (8% v. 9%).	
Utility & Services Source: Oregon Employment Department (OED)	Significantly more homes in Lane County use electric heating in comparison to the state (73% v. 50%), and fewer homes use gas in Lane County. Homes that have electric heat are more vulnerable to hazards that result in a loss of electricity. 3% of housing or less lack of plumbing, kitchen, or telephone services.	

Data Definitions & Thresholds				
Housing Data	Percentage of homes built in the last decade	Less than 4%	4-15%	More than 15%
	Percentage of homes built before 1970	More than 60%	40%-60%	Less than 40%
	Percentage of housing stock that is classified as mobile homes	More than 10%	5-10%	Less than 5%
Utility & Services	Percentage of homes without complete plumbing	More than 2%	1-2%	Less than 1%
	Percentage of homes without complete kitchens	More than 3%	1-3%	Less than 1%
	Percentage of homes dependent on any single fuel supply	More than 70%	60-70%	Less than 60%

7. **What level of educational attainment and earnings are residents reaching?**

People who attain higher education and/or have specialized skills are more likely to be employed and earn higher wages and less likely to primarily depend on public services. Regions that have educational opportunities can provide essential resources and training for local residents preparing to join the workforce. In addition, if economic conditions change and the local employment sectors shift, educational opportunities can be an asset for the community by offering community members new or additional training.

Data to Answer the Question		Results
Local resources for training and education Source: OCWCOG	Lane County is home to private and public colleges and universities that offer a variety programs and degrees. The University of Oregon and Lane Community College are public educational institutions that together enroll more than 33,000 students each. In addition to education, the Lane County JOBS Program, through Oregon DHS, provides short-term vocational training at no cost for eligible TANF (temporary assistance for needy families) recipients.	
Educational attainment of populations Source: ACS (2018)	92% of people in Lane County have attained a minimum of a high-school degree, and 30% of people have earned a bachelor's degree or higher. In Lane County, a slightly smaller proportion of residents have attained higher-education than the state averages. People with only a high-school degree in Lane County have median earnings that are 93% of the state median for those with only a high school degree.	

Data Definitions & Thresholds				
Educational attainment and earnings	Percentage of population (25 years+) with Bachelor's Degree or higher	Less than 25%	25%-35%	More than 35%
	Median earnings of high school graduates (or equivalency) in the county as a percentage of median earnings of high school graduates in state	Less than 75%	75%-105%	More than 105%

8. **Do residents have access to health and wellness facilities?**

A resilient economy can consistently provide residents with basic needs, including shelter, safety, and food. Hospitals, clinics, and grocery stores are vital for preparing for, responding to, and recovering from a major disruption. High levels of baseline community health are important for resilience because communities with healthy residents are better able to absorb the impacts of, and recover from, disasters. Health insurance coverage is a positive indicator of community resilience.

Data to Answer the Question		Results
Hospital, urgent care, and pharmacy coverage Source: OCWCOG & LCOG	Health services are concentrated in Eugene/Springfield and limited in smaller communities. Communities in the eastern part of the county are more than 15 miles from the nearest hospital or urgent care provider.	
Insurance Coverage Source: ACS (2018)	Just under 8% of Lane County residents are uninsured, a slightly higher rate than the State (7%).	

Data Definitions & Thresholds				
Hospital, urgent care, and pharmacy coverage	Percentage of population within 15 miles of a medical facility (hospital, urgent care, clinic)	Less than 40%	40-70%	More than 70%
Insurance Coverage	Percentage of uninsured (non-incarcerated) population	More than 11%	7-11%	Less than 7%