Demography as Destiny?: Socioeconomic Trends in the Portland Metropolitan Region

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Demography as Destiny? Socioeconomic Trends in the Portland Metropolitan Region

Sheila A. Martin, Director
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Institute of Portland Metropolitan Studies (IMS)
Population Research Center (PRC)

Summary

• Demography = Economy
• Migration has immediate (and often enduring) impacts
• Portland is an attractive destination for many people
  – Domestic vs. International migrants
• Educational attainment and the key to our future
Population Dynamics

• Population Equation:
  • Population Change = Births – Deaths + Net Migration

• Focuses:
  • Change in population size
  • Change in population composition
  • ‘The Spatial’ of population

Demographic Data Sources

• U.S. Census Bureau:
  • Decennial Census
  • American Community Survey (ACS)
  • Current Population Survey (CPS)

• Post-Censal population estimates
  • Population Research Center (PRC)
  • U.S. Census Bureau

• Population Forecasts
  • Office of Economic Analysis (OEA)

• Administrative records
Regional demographic trends

Decennial Population Growth Rates

Source: Decennial U.S. Census and 2009 ACS
Total Population by County, Portland MSA

Source: Decennial U.S. Census and 2009 ACS

Decennial Population Growth Rates by County, Portland MSA

Source: Decennial U.S. Census and 2009 ACS
Population Share by County, Portland MSA

Source: Decennial U.S. Census and 2009 ACS

Population Change (2000-2009), Portland MSA

<table>
<thead>
<tr>
<th></th>
<th></th>
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<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Oregon</td>
<td>3,825,657</td>
<td>3,421,399</td>
<td>404,258</td>
<td>11.8%</td>
</tr>
<tr>
<td>Washington</td>
<td>6,664,195</td>
<td>5,894,121</td>
<td>770,074</td>
<td>13.1%</td>
</tr>
<tr>
<td>Clackamas County</td>
<td>386,143</td>
<td>338,391</td>
<td>47,752</td>
<td>14.1%</td>
</tr>
<tr>
<td>Columbia County</td>
<td>49,592</td>
<td>43,560</td>
<td>6,032</td>
<td>13.8%</td>
</tr>
<tr>
<td>Multnomah County</td>
<td>726,855</td>
<td>660,486</td>
<td>66,369</td>
<td>10.0%</td>
</tr>
<tr>
<td>Washington County</td>
<td>537,318</td>
<td>445,342</td>
<td>91,976</td>
<td>20.7%</td>
</tr>
<tr>
<td>Yamhill County</td>
<td>99,037</td>
<td>84,992</td>
<td>14,045</td>
<td>16.5%</td>
</tr>
<tr>
<td>Clark County</td>
<td>432,002</td>
<td>345,238</td>
<td>86,764</td>
<td>25.1%</td>
</tr>
<tr>
<td>Skamania County</td>
<td>10,894</td>
<td>9,872</td>
<td>1,022</td>
<td>10.4%</td>
</tr>
</tbody>
</table>

Source: 2009 U.S. Census Estimates
Components of Population Change (2000-2009), Portland MSA

<table>
<thead>
<tr>
<th></th>
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<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Oregon</td>
<td>433,972</td>
<td>284,372</td>
<td>149,600</td>
<td>274,031</td>
<td>64.7%</td>
</tr>
<tr>
<td>Washington</td>
<td>772,324</td>
<td>424,029</td>
<td>348,295</td>
<td>440,988</td>
<td>55.9%</td>
</tr>
<tr>
<td>Clackamas County</td>
<td>37,655</td>
<td>25,675</td>
<td>11,980</td>
<td>37,497</td>
<td>75.8%</td>
</tr>
<tr>
<td>Columbia County</td>
<td>4,705</td>
<td>3,424</td>
<td>1,281</td>
<td>4,965</td>
<td>79.5%</td>
</tr>
<tr>
<td>Multnomah County</td>
<td>89,735</td>
<td>51,803</td>
<td>37,932</td>
<td>32,685</td>
<td>46.3%</td>
</tr>
<tr>
<td>Washington County</td>
<td>70,962</td>
<td>25,539</td>
<td>45,423</td>
<td>49,393</td>
<td>52.1%</td>
</tr>
<tr>
<td>Yamhill County</td>
<td>11,348</td>
<td>6,809</td>
<td>4,539</td>
<td>9,899</td>
<td>68.6%</td>
</tr>
<tr>
<td>Clark County</td>
<td>51,962</td>
<td>23,977</td>
<td>27,985</td>
<td>9,466</td>
<td>25.3%</td>
</tr>
<tr>
<td>Skamania County</td>
<td>962</td>
<td>676</td>
<td>286</td>
<td>792</td>
<td>73.5%</td>
</tr>
</tbody>
</table>

Source: 2009 U.S. Census Estimates
Population Forecast for Portland Metro Counties, 2010-2040

Source: OEA (2004)
Multnomah County Demographics

- Household Size: 2.35
- % Hispanic: 10.9%
- % Black: 5.2%
- % with Bachelor’s degree: 39.1%
- % English Primary Language: 83.0%
- Median Household Income: $50,773
% Hispanic | 10.0%
% Black | 15.1%
% with BA | 39.2%
% English | 83.5%
Med HH Income | $50,010

Source: 2009 ACS

% Hispanic | 17.4%
% Black | 8.5%
% with BA | 18.7%
% English | 75.5%
Med HH Income | $41,841

Source: 2009 ACS
% Hispanic: 6.0%
% Black: 0.7%
% with BA: 23.0%
% English: 90.4%
Med HH Income: $61,800

Average Household Size by Portland Metro Area PUMAs, 2009:

Counts
Average HH Size
1.01 - 2.45
2.46 - 3.05
3.06 - 3.55
3.56 - 4.05
4.06 - 4.55

Source:
U.S. Census Bureau
AC2 100 block groups, 2009
BLS, Q4 Job Data, 2010
Population Research Center
Percent Population in Poverty by Portland Metro Area PUMAs, 2009

Percent Population in Poverty by Portland Metro Area Census Tracts, 2009
Regional Economy

Recession Cost Region 10% of Jobs

Peak Nov 2007

Trough Jan 2010

Source: Oregon Employment Department
Recovery is slow...

Source: Oregon Employment Department

Some industries recover... slowly

Source: Oregon Employment Department
Housing market continues to slide

Portland Case Shiller Price Tiers Nov. 2010

But the stock market is recovering

NASDAQ 1-year

1 YEAR CHANGE 26.59%
Economic Opportunity affects Migration...

Average Annual Net Migration of Adults with College Degrees per 100 residents

<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Metro Rate</td>
<td>Metro Rate</td>
</tr>
<tr>
<td>1. Charlotte 2.77</td>
<td>1. Austin 2.81</td>
</tr>
<tr>
<td>2. Austin 2.31</td>
<td>2. Raleigh 1.98</td>
</tr>
<tr>
<td>3. Tuscon 2.13</td>
<td>3. Portland 1.59</td>
</tr>
<tr>
<td>4. Riverside 2.07</td>
<td>4. Riverside 2.34</td>
</tr>
<tr>
<td>5. Phoenix 2.07</td>
<td>5. Phoenix 1.31</td>
</tr>
<tr>
<td>6. Las Vegas 2.06</td>
<td>6. Charlotte 2.30</td>
</tr>
</tbody>
</table>


Opportunity is beginning to knock

Job Vacancies in Oregon, History of the Job Vacancy Survey

Source: Oregon Employment Department
Who will answer?

Percentage of Workforce Age 55 and Older
Selected Industries – Oregon Portion of Portland Metro – Q4 2009

<table>
<thead>
<tr>
<th>Occupation</th>
<th>Vacant 60+ Days</th>
</tr>
</thead>
<tbody>
<tr>
<td>Education</td>
<td>24.2%</td>
</tr>
<tr>
<td>Health Care</td>
<td>22.2%</td>
</tr>
<tr>
<td>Public Admin</td>
<td>23.2%</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>19.3%</td>
</tr>
<tr>
<td>Total</td>
<td>19.2%</td>
</tr>
</tbody>
</table>

Source: Oregon Employment Department

Some jobs are harder to fill

Top 20 Occupations With Vacancies Open 60+ Days
Oregon, Fall 2010

<table>
<thead>
<tr>
<th>Occupation</th>
<th>Vacant 60+ Days</th>
</tr>
</thead>
<tbody>
<tr>
<td>All Occupations</td>
<td>2,354</td>
</tr>
<tr>
<td>Registered Nurses</td>
<td>105</td>
</tr>
<tr>
<td>Postsecondary Teachers, Except Graduate Teaching Assistants</td>
<td>78</td>
</tr>
<tr>
<td>Mental Health Counselors</td>
<td>78</td>
</tr>
<tr>
<td>Advertising Sales Agents</td>
<td>61</td>
</tr>
<tr>
<td>Teacher Assistants</td>
<td>57</td>
</tr>
<tr>
<td>Coaches and Scouts</td>
<td>54</td>
</tr>
<tr>
<td>Automotive Service Technicians and Mechanics</td>
<td>51</td>
</tr>
<tr>
<td>Engineers, All Other</td>
<td>50</td>
</tr>
<tr>
<td>Accountants and Auditors</td>
<td>49</td>
</tr>
<tr>
<td>Electrical Engineers</td>
<td>49</td>
</tr>
<tr>
<td>Physical Therapists</td>
<td>47</td>
</tr>
<tr>
<td>Business Operations Specialists, All Other</td>
<td>42</td>
</tr>
<tr>
<td>Physicians and Surgeons</td>
<td>42</td>
</tr>
<tr>
<td>Occupational Therapists</td>
<td>39</td>
</tr>
<tr>
<td>Supervisors and Managers of Production and Operating Workers</td>
<td>35</td>
</tr>
<tr>
<td>Civil Engineers</td>
<td>35</td>
</tr>
<tr>
<td>Loan Officers</td>
<td>34</td>
</tr>
<tr>
<td>Industrial Engineers</td>
<td>34</td>
</tr>
<tr>
<td>Customer Service Representatives</td>
<td>33</td>
</tr>
<tr>
<td>Licensed Practical and Licensed Vocational Nurses</td>
<td>32</td>
</tr>
</tbody>
</table>
1 in 4 vacancies require college degree, but 61 percent of 60+ day vacancies do.

Oregon Job Vacancies by Required Education, Fall 2010

- No Requirement: 9,122
- High School Diploma: 6,466
- Bachelor's Degree: 4,635
- Associate or Vocational Degree: 1,928
- Some College, no degree: 1,050
- Associates: 1,689
- Graduate Degree: 1,689
- Other: 2,541

Education increases opportunity

### Unemployment Rate by Educational Attainment

<table>
<thead>
<tr>
<th>Educational Attainment</th>
<th>2008</th>
<th>2009</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less than a HS Diploma</td>
<td>5.6</td>
<td>6.6</td>
</tr>
<tr>
<td>HS Grad, no college</td>
<td>5.7</td>
<td>5.6</td>
</tr>
<tr>
<td>Some College, no degree</td>
<td>5.1</td>
<td>5.5</td>
</tr>
<tr>
<td>Associates</td>
<td>3.7</td>
<td>3.6</td>
</tr>
<tr>
<td>B.A or higher</td>
<td>2.8</td>
<td>1.4</td>
</tr>
</tbody>
</table>
Will employers find educated workers?

Source: 2009 American Community Survey

Education = Income

Per Capita Income vs. Adult (25+) College Degree
Share, 50 largest MSAs, 2006-08

Source: American Community Survey, 2008 5-Year Estimates
Percent of all Oregon students who graduate from high school with a regular diploma in four years

- All Students: 74%
- White: 76%
- Black: 55%
- Hispanic: 58%
- Asian: 81%
- American Indian: 49%

Source: Alliance for Excellent Education

State and student share of College Expenses (Source of OUS Revenue per student)

- 1990: 29% Other S&G Funds, 36% State Appropriation, 43% Tuition
- 1992: 43% Other S&G Funds, 48% State Appropriation, 47% Tuition
- 1994: 47% Other S&G Funds, 43% State Appropriation, 47% Tuition
- 1996: 56% Other S&G Funds, 56% State Appropriation, 55% Tuition
- 1998: 63% Other S&G Funds, 63% State Appropriation, 63% Tuition
- 2000: 63% Other S&G Funds, 63% State Appropriation, 63% Tuition
- 2002: 63% Other S&G Funds, 63% State Appropriation, 63% Tuition
- 2004: 63% Other S&G Funds, 63% State Appropriation, 63% Tuition
- 2006: 63% Other S&G Funds, 63% State Appropriation, 63% Tuition
- 2008: 63% Other S&G Funds, 63% State Appropriation, 63% Tuition
- 2010: 63% Other S&G Funds, 63% State Appropriation, 63% Tuition

Source: Oregon University System
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