

# California



## 1990-2000 State Summary of Coastal and Ocean Social and Economic Trends

National Ocean Economics Program

# State Summary

This report provides summary information on the economy and demographics of the California coast\*.

The map on the front separates the coastal from inland counties.

This is one of an ongoing series of reports prepared by the National Ocean Economics Program (NOEP) to provide state overviews of the available data on the economic and social characteristics of America's coasts and coastal oceans.

Funding for this work comes from the Coastal Services Center, NOAA, Department of Commerce and the State of California Resources Agency.

\* Some of the values in this summary report are slightly different from those found in the full California Ocean Economics Report because it reflects recently updated data from the BLS site. Values continue to change over time as the government revises its original figures.

# Important information before reading...

## Coastal Economy and Ocean Economy are not the same.

### Coastal Economy

- **The *Coastal Economy* is the sum of all economic activity occurring in counties defined as part of a state's coastal zone management program.**
  - Employment data “excludes proprietors, self-employed, unpaid family or volunteer workers, farm workers, and domestic workers.”

### Ocean Economy

- **The *Ocean Economy* comprises economic activity for the state that uses the resources of the ocean, directly or indirectly, as an input.**
  - Because of data limitations or legal restrictions, the current data series on the Ocean Economy excludes government ocean related activities, the marine research sector, real estate, and fisheries harvesting employment. Thus, the employment numbers, wages and salary, and GSP(see page 4) estimates for fisheries are undervalued in this Summary.
  - Ocean Economy is measured only in coastal counties at this time, however Ocean Economy activities extend throughout the United States.

### Geography

- **Coastal Watershed**
  - As defined by NOAA ([http://www.census.gov/geo/landview/lv6help/coastal\\_cty.pdf](http://www.census.gov/geo/landview/lv6help/coastal_cty.pdf))
- **Coastal zone program counties**
  - As indicated for the Federal Coastal Zone Management Program
- **Shoreline counties**
  - Defined as those counties which touch the ocean
- **Near-shore**
  - Defined by coastal zip codes along the shoreline

# Economic and Social Indicators

Five indicators\* describe changes in both the **Coastal and Ocean Economies**.

## *Economic* indicators:

- **Employment**
  - Annual average wage and salary employment excluding self-employment.
- **Wages and Salaries**
  - The total wages and salaries paid.
  - All wages are shown in 2000 dollars.
- **Gross State Product (GSP)**
  - GSP is the total value of goods and services produced in a state.
  - Unless otherwise indicated, all measures are stated as direct values.
  - All values are shown in 2000 dollars.
- **Multipliers**
  - Indirect and induced values. Multipliers affect the estimates of employment, wages, and output within the region. Indirect effects include both the change in economic activity in industries within the region that buy or sell from ocean industries and the change in economic activity resulting from the spending of the wages earned by those employed by the ocean industries within the region. All indirect values or multiplier effects are based on IMPLAN, a standard and widely used economic impact model.

## *Social* indicators:

- **Population**
- **Housing Patterns and Trends**
  - Includes all housing units, both single and multi-family, including seasonal and year round, owner occupied and rental.

\*A sixth indicator, number of establishments, appears on the NOEP website

# California Quick Facts

## ■ Geographic Notes

- There is great diversity in regional activity along the 840 mile coastline. In 2000, the largest concentration of coastal economic activity was located in the southern coastal counties.
- The northern coastal counties experienced the highest population growth rate from 1990 to 2000.

## ■ Coastal Economy

- Between 1990 and 2000, California's coastal population grew more slowly than the overall state population: 11.3 % compared to 13.7%, a difference of 2.4%.
- In 2000, 77% of California's population lived in coastal counties, which represent 25% of the land.
- Coastal employment in California increased by 9.7% from 1990 to 2000, representing more than 80% of the state's total employment.

## ■ Ocean Economy

- California has the largest Ocean Economy in the US, ranking first for employment, wages, and GSP.
- In 2000, California Ocean Economy provided over 400,000 jobs, or 4.9% of employment in California's Coastal Economy, and more than 690,000 jobs when multiplier effects are considered.
- In 2000, the direct market value (GSP) of California's Ocean Economy was \$21.4 billion, and the total market value (GSP) of California's Ocean Economy was \$42.9 billion.
- Between 1990 and 2000, the Coastal Tourism & Recreation sector far outperformed all other ocean sectors in growth rates.

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# Coastal Economy and Social Indicators

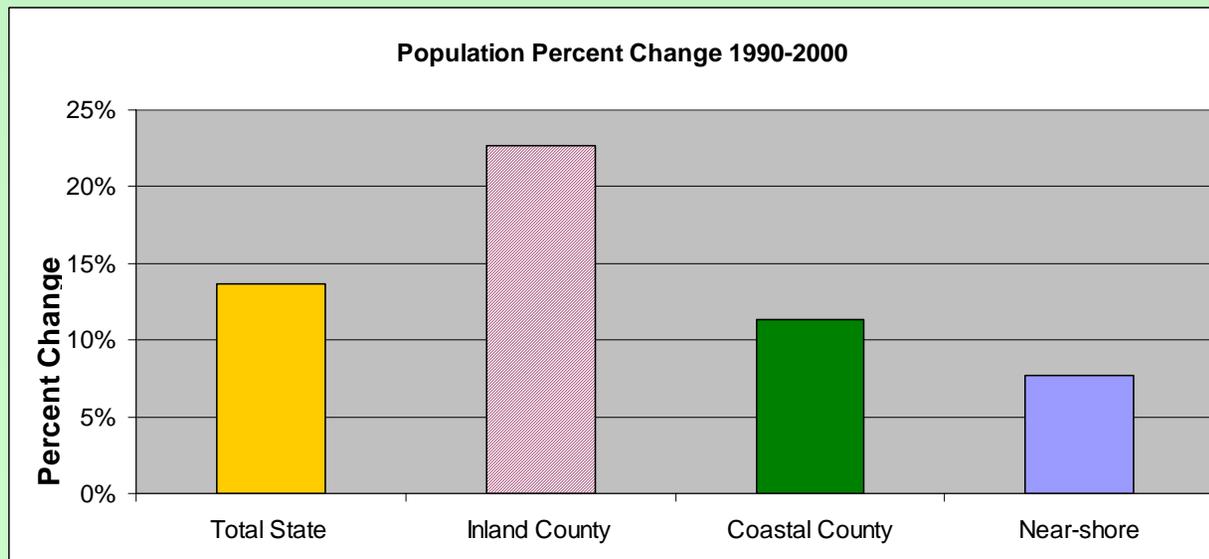
# California Coastal Counties

Alameda	San Francisco
Contra Costa *	San Joaquin *
Del Norte	San Luis Obispo
Humboldt	San Mateo
Los Angeles	Santa Barbara
Marin	Santa Clara
Mendocino	Santa Cruz
Monterey	Solano *
Napa	Sonoma
Orange	Ventura
Sacramento *	Yolo *
San Diego	

\* Watershed/delta counties with ports and ocean related industries

# California Population Growth

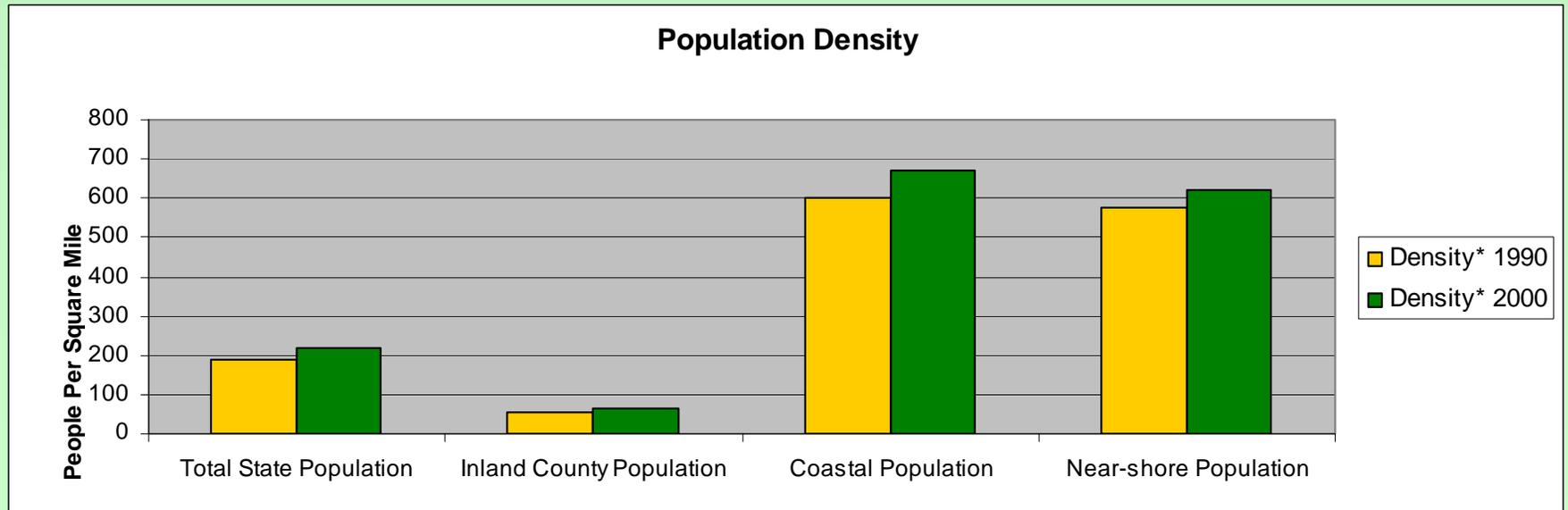
Year	Total State Population	Inland County Population	Coastal Population	Near-shore Population
1990	29,785,857	6,239,170	23,546,687	4,481,996
2000	33,871,648	7,655,792	26,215,856	4,828,228
Change	4,085,791	1,416,622	2,669,169	346,232
Percent Change	13.7%	22.7%	11.3%	7.7%



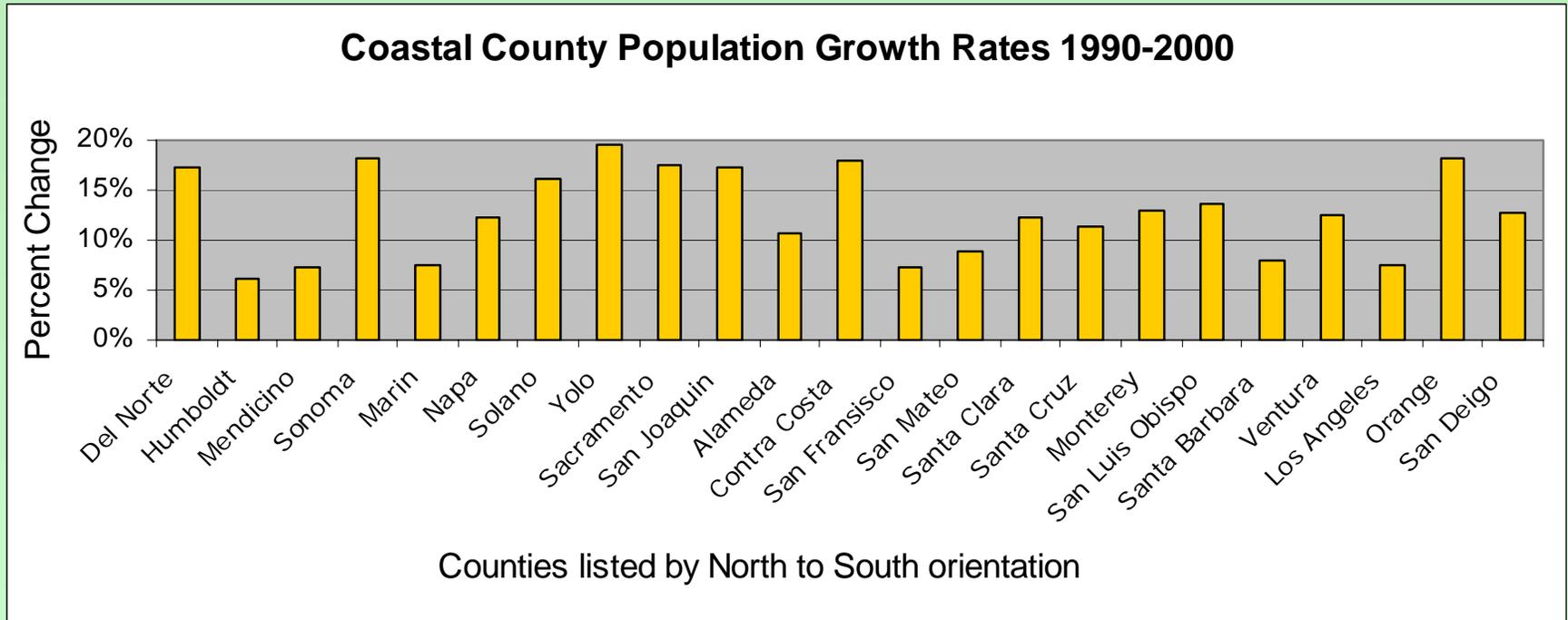
# California Population Density

Year	Total State Population	Inland County Population	Coastal Population	Near-shore Population
Density* 1990	191.0	53.4	602.3	578.5
Density* 2000	217.2	65.9	670.6	623.2
Change	26.2	12.5	68.3	44.7
Percent Change	13.7%	23.4%	11.3%	7.7%

\* Density = per square mile



# California Coastal County Population Growth Rates 1990 - 2000



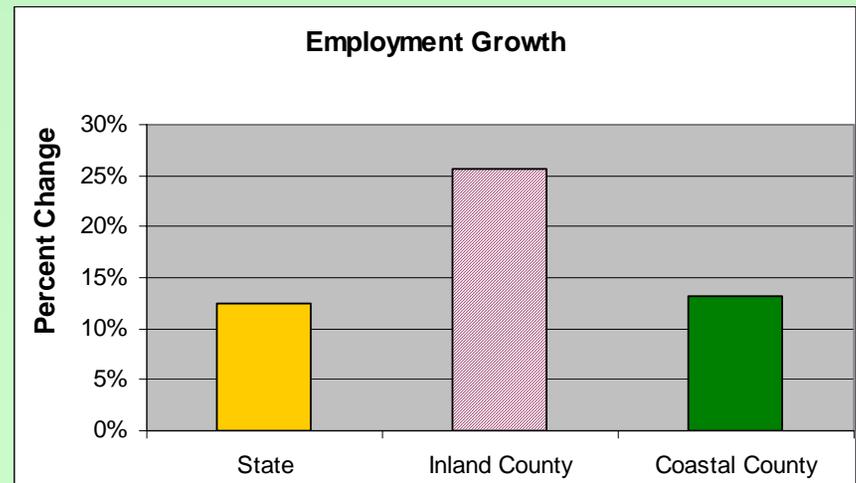
- Population across California coastal counties grew from 6.2% to 20% over the 1990 – 2000 period.
- Yolo county had the highest growth rate.
- Humboldt and San Francisco counties had the lowest growth rate.
- In 2000, 77.4% of California's population was living in coastal counties, or 25% of the land.

# California Employment Growth

Year	Total State Employment *	Inland County Employment	Coastal County Employment	Coastal County % of State Employment	Inland County % of State Employment
1990	13,262,696	2,034,935	11,092,302	79.2%	15.3%
2000	14,905,055	2,557,295	12,025,424	80.7%	17.2%
Change	1,642,359	522,360	933,122		
Percent Change	12.4%	25.7%	13.2%	1.5%	1.8%

\* Because of differences in BLS data reporting, Coastal County and Inland County do not equal Total State.

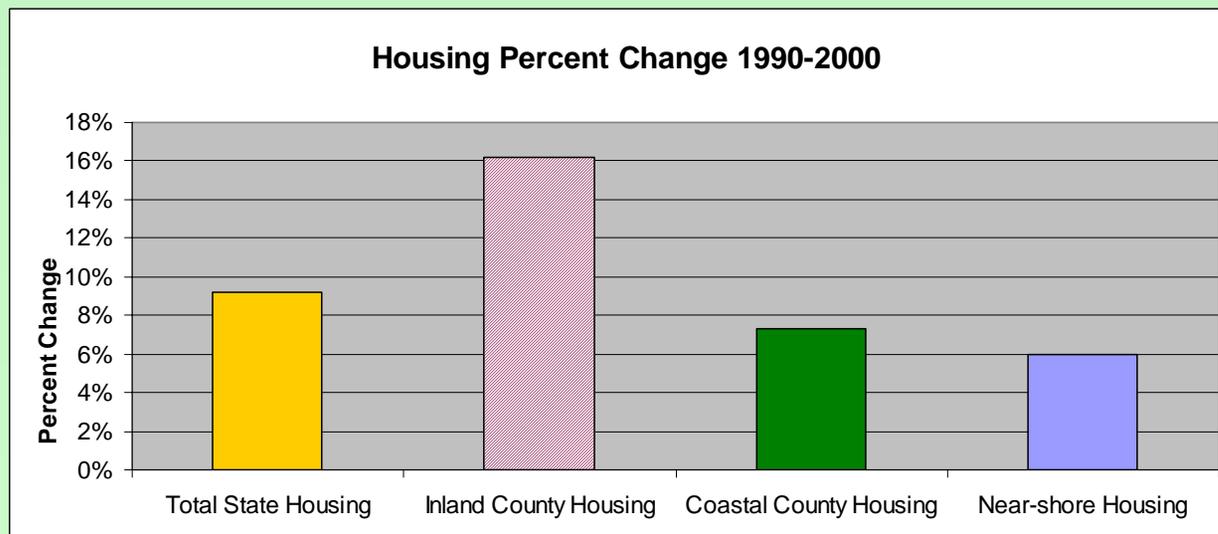
- In 2000, coastal county employment was 12,025,424 or nearly 81% of the state employment.



# California Housing Growth

Year	Total State Housing Units	Inland County Housing Units	Coastal County Housing Units	Near-shore Housing Units
1990	11,182,882	2,432,253	8,750,629	1,858,485
2000	12,214,549	2,825,292	9,389,257	1,969,411
Change	1,031,667	393,039	638,628	110,926
Percent Change	9.2%	16.2%	7.3%	6.0%

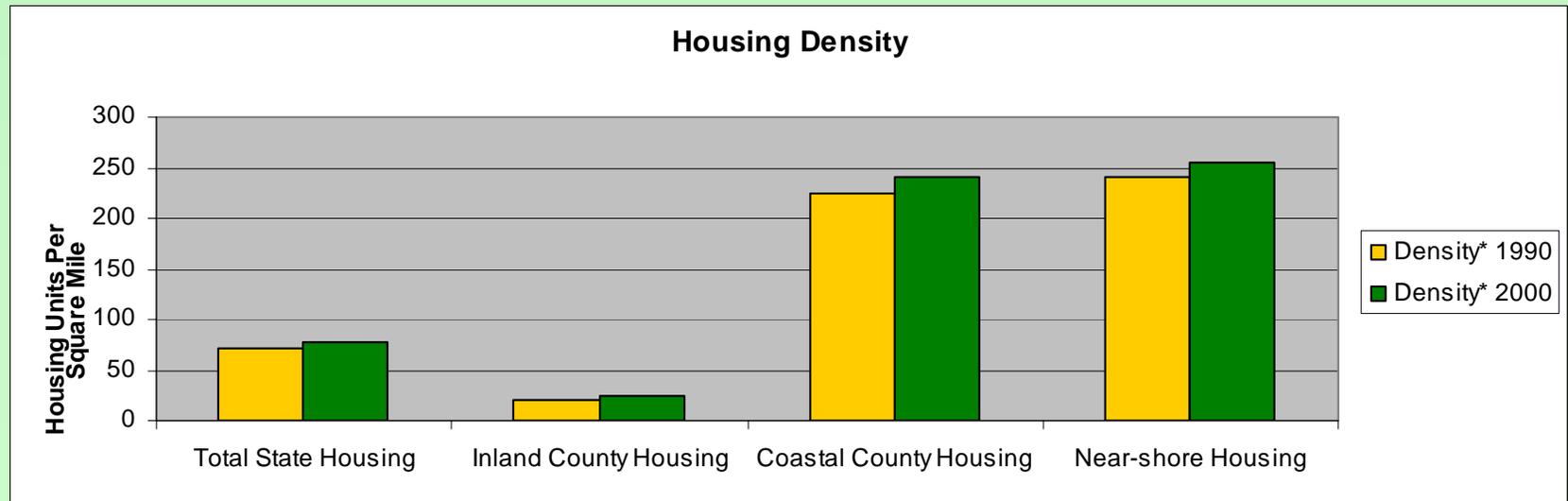
- In 2000, the coastal county housing was about 9.4 million or 76.8% of the total state housing.



# California Housing Density

Year	Total State Housing	Inland County Housing	Coastal County Housing	Near-shore Housing
Density* 1990	71.7	20.8	223.8	239.9
Density* 2000	78.3	24.3	240.2	254.2
Change	6.6	3.5	16.4	14.3
Percent Change	9.2%	16.8%	7.3%	6.0%

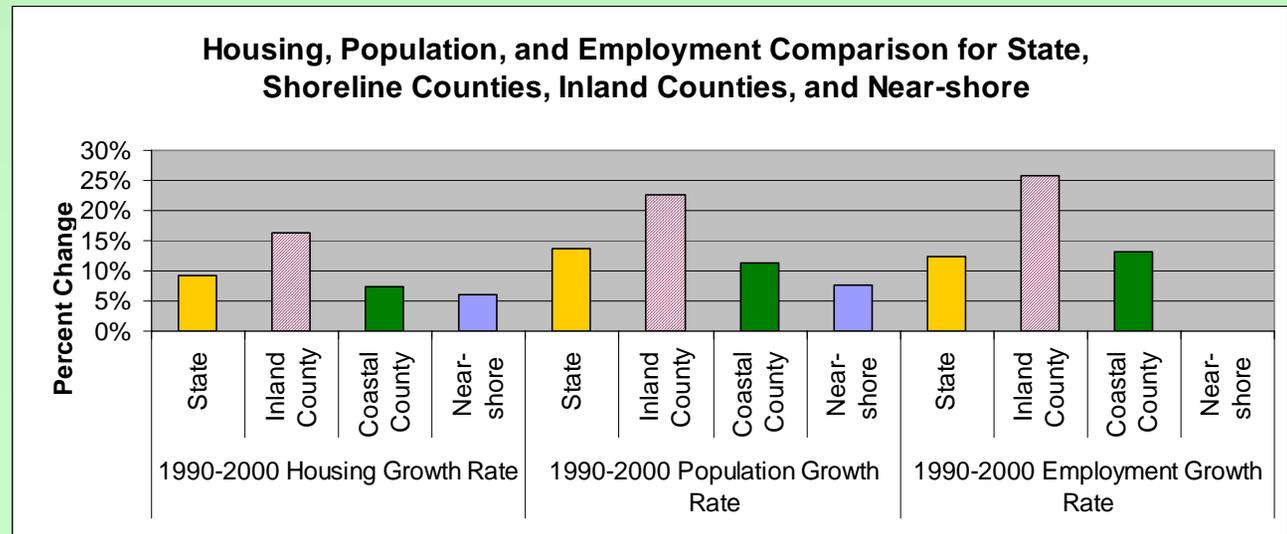
\* Density = per square mile



# Comparison of Housing, Population, and Employment

1990-2000 Housing Growth Rate				1990-2000 Population Growth Rate				1990-2000 Employment Growth Rate			
State	Inland County	Coastal County	Near-shore	State	Inland County	Coastal County	Near-shore	State	Inland County	Coastal County	Near-shore
9.2%	16.2%	7.3%	6.0%	13.7%	22.7%	11.3%	7.7%	12.4%	25.7%	13.2%	N/A

- Compared to Inland Counties, the Coastal County and Near-shore areas have experienced relatively lower housing, population, and employment growth.
- Population and Housing density increased more in Coastal Counties, but at the Near-shore areas it remained the same.



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# Ocean Economy

# Sectors and Industries of Ocean Economy

[According to Bureau of Economic Analysis (BEA) Standard Industrial Classification (SIC) codes]

<b>Construction - Marine</b>	<i>Boat Dealers</i>
<i>Heavy Construction</i>	<i>Eating and Drinking Places</i>
<b>Living Resources - Marine</b>	<i>Hotels and Lodging</i>
<i>Fish Harvesting</i>	<i>Marinas</i>
<i>Fish Hatcheries and Aquaculture</i>	<i>Recreational Vehicle Parks and Campgrounds</i>
<i>Seafood Processing</i>	<i>Sporting Goods Retailers</i>
<b>Minerals - Offshore</b>	<i>Zoos and Aquaria</i>
<i>Limestone, Sand, and Gravel</i>	<b>Transportation - Marine</b>
<i>Oil &amp; Gas Exploration</i>	<i>Deep-sea Freight Transportation</i>
<i>Oil &amp; Gas Production</i>	<i>Marine Passenger Transportation</i>
<b>Ship &amp; Boat Building</b>	<i>Marine Transportation Services</i>
<i>Boat Building and Repair</i>	<i>Petroleum and Natural Gas Pipelines</i>
<i>Ship Building and Repair</i>	<i>Search and Navigation Equipment</i>
<b>Tourism &amp; Recreation - Coastal</b>	<i>Warehousing</i>
<i>Amusement and Recreation Services</i>	

Not Currently Available: Real Estate, Scientific Marine Research, or Government data.

Note: Industries in *italics* are defined as *Ocean* if establishment is located in near-shore zip code.

# Ocean-related GSP of Coastal States for 2000

State	Rank	GSP (2000)	State	Rank	GSP (2000)
<b>California</b>	<b>1</b>	<b>\$21,434,428,141</b>	Michigan	15	\$2,002,302,949
Louisiana	2	\$15,248,432,508	Mississippi	16	\$1,785,750,627
Florida	3	\$11,676,830,383	Maine	17	\$1,519,896,601
Washington	4	\$7,683,892,713	South Carolina	18	\$1,422,939,938
New Jersey	5	\$6,848,544,553	Wisconsin	19	\$1,241,080,165
Texas	6	\$6,446,339,764	Georgia	20	\$1,167,788,146
Alaska	7	\$5,239,162,298	North Carolina	21	\$1,097,149,561
New York	8	\$5,092,727,554	Indiana	22	\$994,142,073
Hawaii	9	\$4,030,681,483	Ohio	23	\$942,681,414
Virginia	10	\$3,565,652,519	Rhode Island	24	\$862,983,177
Illinois	11	\$3,324,045,497	Alabama	25	\$766,574,374
Pennsylvania	12	\$2,867,222,029	Oregon	26	\$710,837,378
Connecticut	13	\$2,454,068,194	New Hampshire	27	\$519,075,829
Maryland	14	\$2,363,494,739	Minnesota	28	\$454,283,828
			Delaware	29	\$362,687,784

Note: Summary excludes Massachusetts, which does not permit access to its data.

# Percentage of Total GSP added by Ocean-related GSP by State for 2000

State	Rank	% of Total GSP (2000)	State	Rank	% of Total GSP (2000)
Alaska	1	18.99%	New Hampshire	15	1.19%
Louisiana	2	11.32%	Texas	16	0.89%
Hawaii	3	10.03%	Delaware	17	0.86%
Maine	4	4.26%	Pennsylvania	18	0.73%
Washington	5	3.47%	Illinois	19	0.72%
Mississippi	6	2.78%	Wisconsin	20	0.70%
Rhode Island	7	2.55%	Alabama	21	0.67%
Florida	8	2.48%	New York	22	0.66%
New Jersey	9	1.99%	Oregon	23	0.63%
<b>California</b>	<b>10</b>	<b>1.66%</b>	Michigan	24	0.59%
Connecticut	11	1.53%	Indiana	25	0.51%
Virginia	12	1.37%	Georgia	26	0.40%
Maryland	13	1.31%	North Carolina	27	0.40%
South Carolina	14	1.26%	Ohio	28	0.25%
			Minnesota	29	0.24%

Note: Summary excludes Massachusetts, which does not permit access to its data.

# Contribution of the California Ocean Economy in 2000

2000 Ocean Economy				
Indicator	Direct Value	Indirect and Induced	Total	Multiplier
Employment	408,127	285,689	693,816	1.7
Wages	\$11,441,454,062	\$12,585,599,468	\$24,027,053,530	2.1
GSP	\$21,434,428,141	\$21,434,428,141	\$42,868,856,282	2.0

□ California's Ocean Economy generated almost \$42.87 billion in total GSP during 2000.

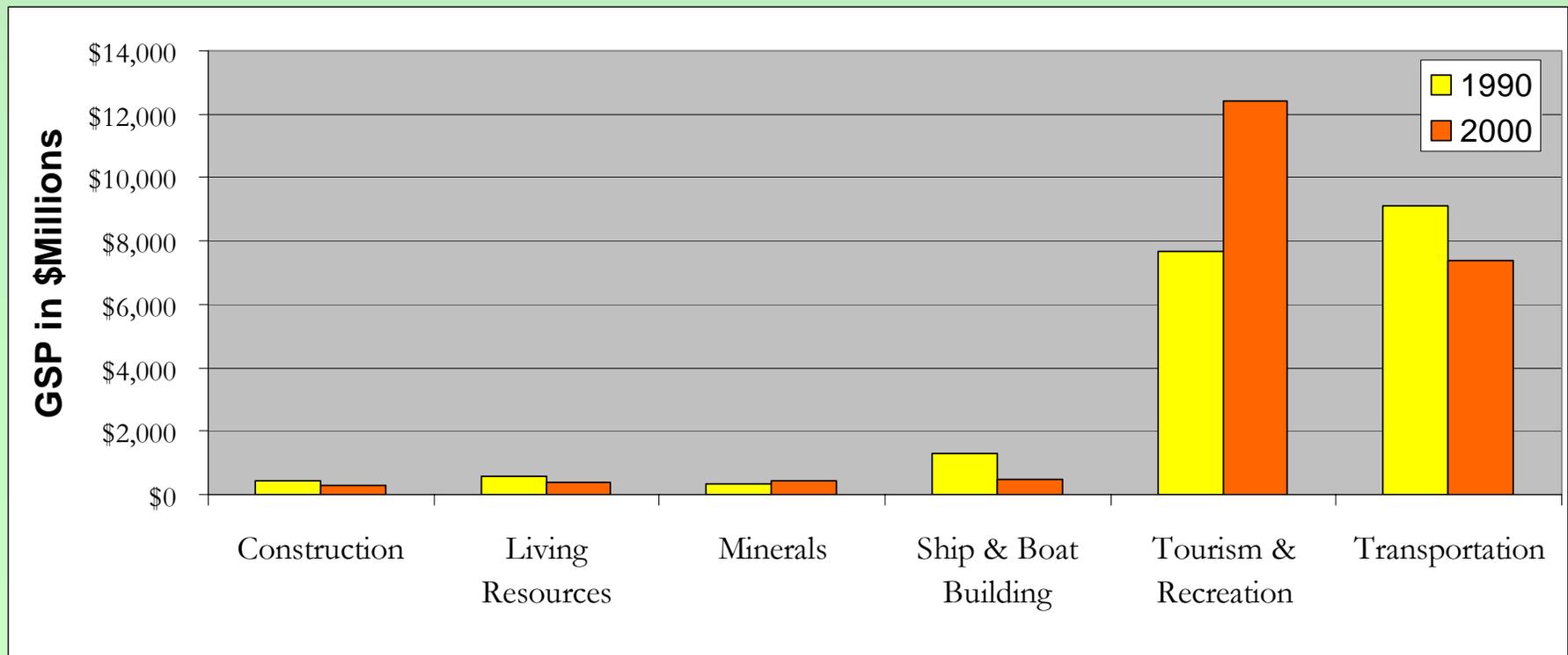
# Ocean Economy GSP by Sector

## California's Ocean Economy GSP by Sector 2000

Sector	Direct GSP in Millions	Indirect and Induced GSP in Millions	Total GSP in Millions	Multiplier
Tourism & Recreation	\$12,426.6	\$9,941.3	\$22,367.9	1.8
Transportation	\$7,386.8	\$10,341.6	\$17,728.4	2.4
Ship & Boat Building	\$493.1	\$394.5	\$887.6	1.8
Living Resources	\$403.3	\$322.6	\$725.9	1.8
Minerals	\$415.5	\$290.8	\$706.3	1.7
Construction	\$309.1	\$309.1	\$618.2	2.0

# Ocean Economy GSP Growth

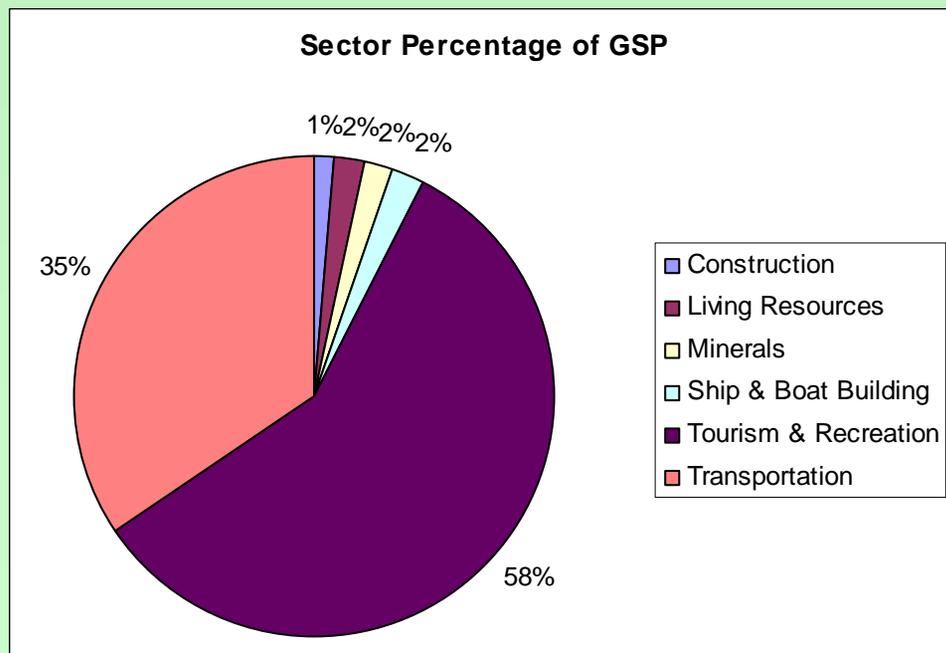
- The fastest growing sectors were Tourism & Recreation (61.6%) and Marine Minerals (30.9%), while the total Ocean Economy grew by 10.6% or about \$6.8 billion.



# Percentage of Ocean Economy GSP by Sector for 2000

- Tourism & Recreation and Transportation are by far the, main activities contributing to the Ocean Economy.

Sector	Percent of GSP
Construction	1.4%
Living Resources	1.9%
Minerals	1.9%
Ship & Boat Building	2.3%
Tourism & Recreation	58.0%
Transportation	34.5%
All Ocean Sectors	100.0%



# Ocean Economy Employment by Sector

Sector	Direct Employment	Indirect Employment	Total Employment	Multiplier
Construction	2,883	2,550	5,383	1.9
Living Resources	6,015	2,406	8,421	1.4
Minerals	1,014	2,028	3,042	3.0
Ship & Boat Building	10,557	8,446	19,003	1.8
Tourism & Recreation	313,417	94,025	407,442	1.3
Transportation	74,289	163,436	237,725	3.2

- Ocean employment increased 389,123 to 408,127 or 4.9% over the decade.
- Coastal Tourism & Recreation employment grew by 35.2%.
- All other sectors declined in employment.

# GSP Contribution per Employee for 2000

Ranking	Sector	Ocean Economy GSP	Employment	GSP Contribution per Employee
1	Minerals	\$415,487,797	1,014	\$409,751
2	Construction	\$309,081,043	2,833	\$109,100
3	Transportation	\$7,386,839,629	74,289	\$99,434
4	Living Resources	\$403,284,093	6,015	\$67,046
5	Ship & Boat Building	\$493,135,966	10,557	\$46,712
6	Tourism & Recreation	\$12,426,599,613	313,417	\$39,649

# Ocean Economy Contribution to Wages by Sector

## California's Ocean Economy GSP by Sector 2000

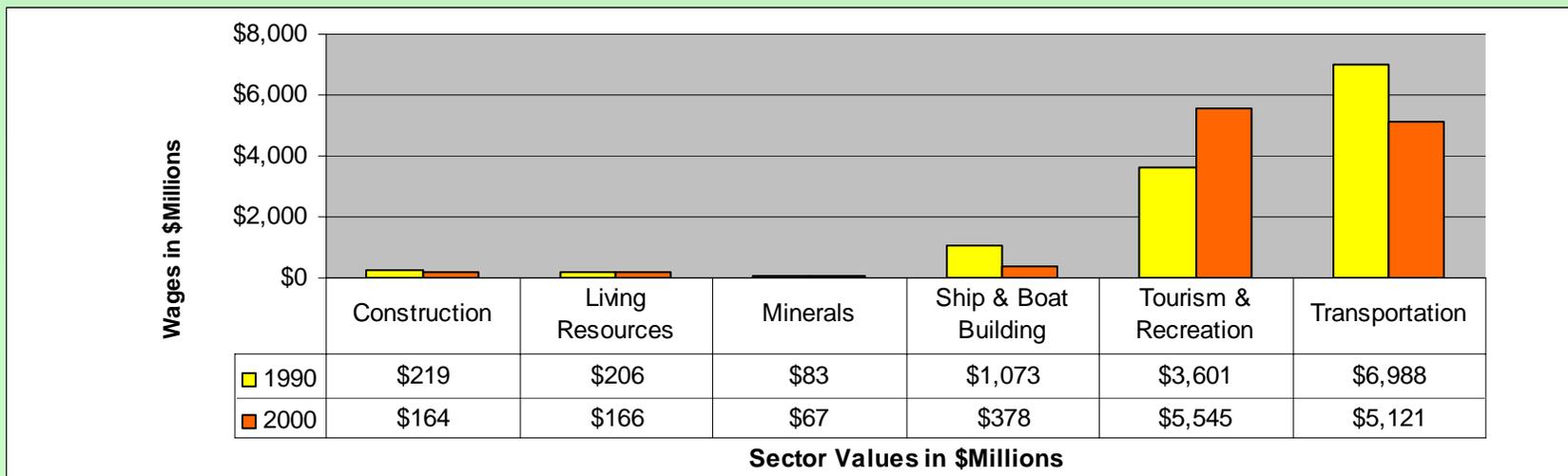
Sector	Direct Wages in Millions	Indirect and Induced Wages in Millions	Total Wages in Millions	Multiplier
Transportation	\$5,121.4	\$7,170.0	\$12,291.4	2.4
Tourism & Recreation	\$5,545.0	\$4,436.0	\$9,981.0	1.8
Ship & Boat Building	\$377.6	\$302.1	\$679.8	1.8
Construction	\$164.4	\$164.4	\$328.8	2.0
Living Resources	\$165.9	\$132.7	\$298.7	1.8
Minerals	\$67.1	\$47.0	\$114.1	1.7

# Ocean Economy Contribution to Wages by Sector

<b>California's Ocean Economy GSP by Sector 2000</b>				
<b>Sector</b>	<b>Direct Wages in Millions</b>	<b>Indirect and Induced Wages in Millions</b>	<b>Total Wages in Millions</b>	<b>Multiplier</b>
Transportation	\$5,121.4	\$7,170.0	\$12,291.4	2.4
Tourism & Recreation	\$5,545.0	\$4,436.0	\$9,981.0	1.8
Ship & Boat Building	\$377.6	\$302.1	\$679.8	1.8
Construction	\$164.4	\$164.4	\$328.8	2.0
Living Resources	\$165.9	\$132.7	\$298.7	1.8
Minerals	\$67.1	\$47.0	\$114.1	1.7

# Wage Comparison of Ocean Economy by Sector

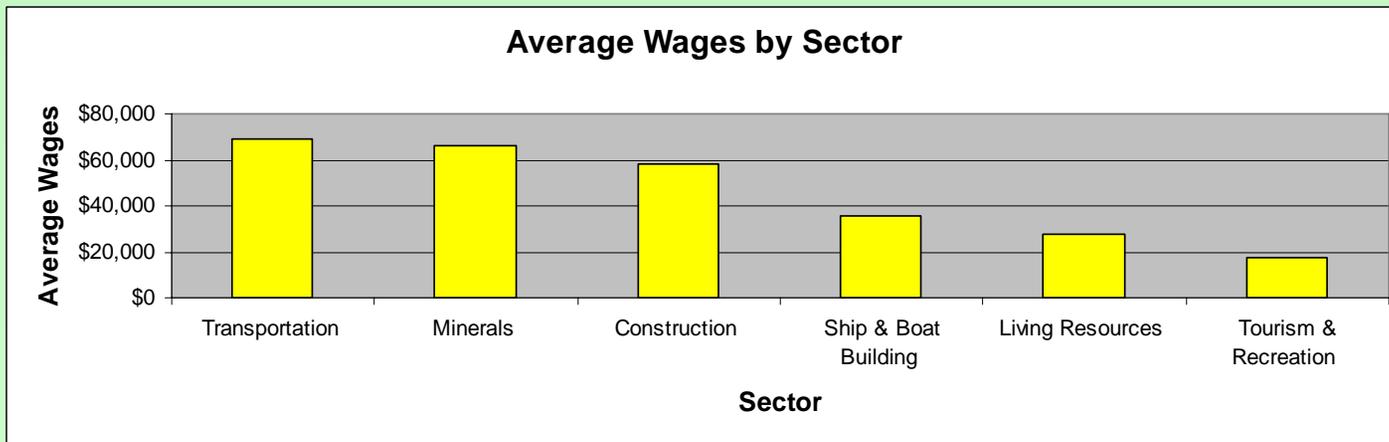
- Overall, wages declined from \$12.17 billion to \$11.44 billion, or 6.0% over the decade.
- Coastal Tourism & Recreation was the only sector to increase in real wages from 1990 to 2000.



# Ranking of Average Wages by Sector for 2000

- The Transportation sector paid the highest average wages in 2000.
- Tourism & Recreation paid the lowest average wages in 2000.

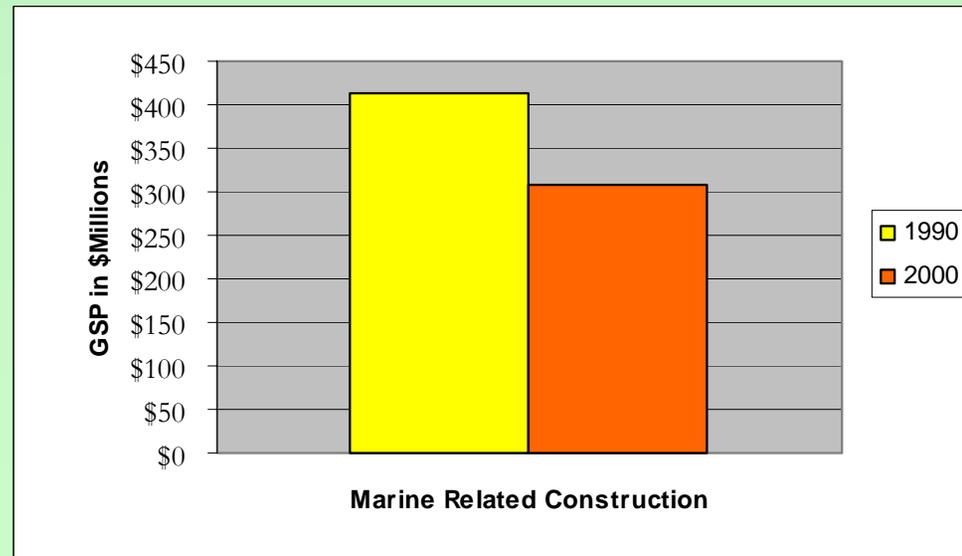
Ranking	Sector	Wages	Employment	Average Wages
1	Transportation	\$5,121,396,509	74,289	\$68,939
2	Minerals	\$67,091,107	1,014	\$66,165
3	Construction	\$164,413,562	2,833	\$58,035
4	Ship & Boat Building	\$377,642,817	10,557	\$35,772
5	Living Resources	\$165,933,760	6,015	\$27,587
6	Tourism & Recreation	\$5,544,976,307	313,417	\$17,692



# Construction GSP by Industry

- The Construction industry contributed 1.4% to California's total Ocean Economy GSP in 2000.
- Marine Construction GSP declined approximately \$105,000,000, or over 25% between 1990 and 2000.

Industry	1990 GSP in \$Millions	2000 GSP in \$Millions	Change in GSP in \$Millions	Percent Change
Marine Related Construction	\$414.3	\$309.1	-\$105.2	-35.4%

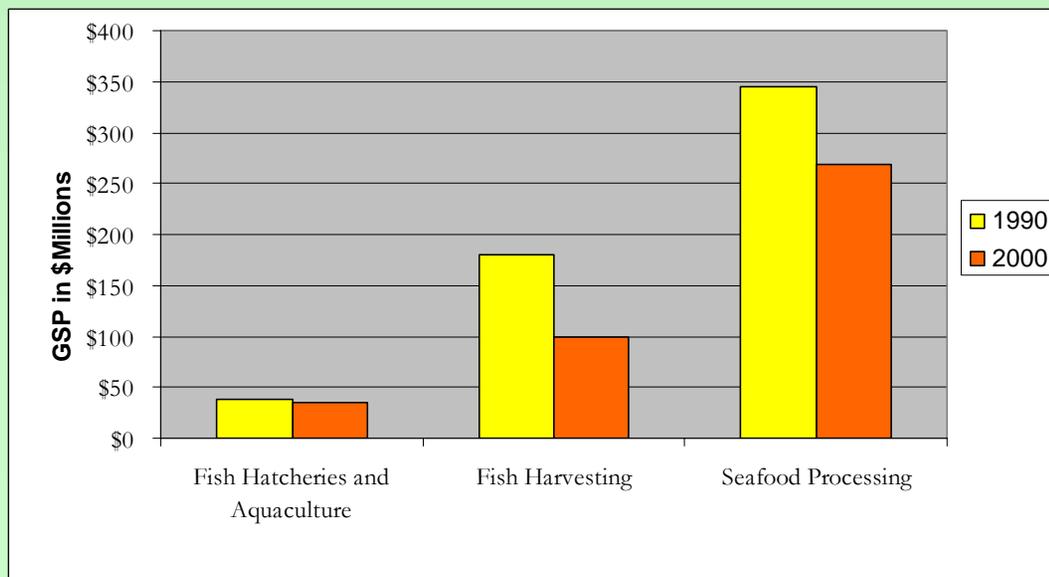


# Living Resources GSP by Industry

- The Marine Living Resources sector contributed 1.9% to California's total Ocean Economy GSP or \$403,284,093 in 2000.

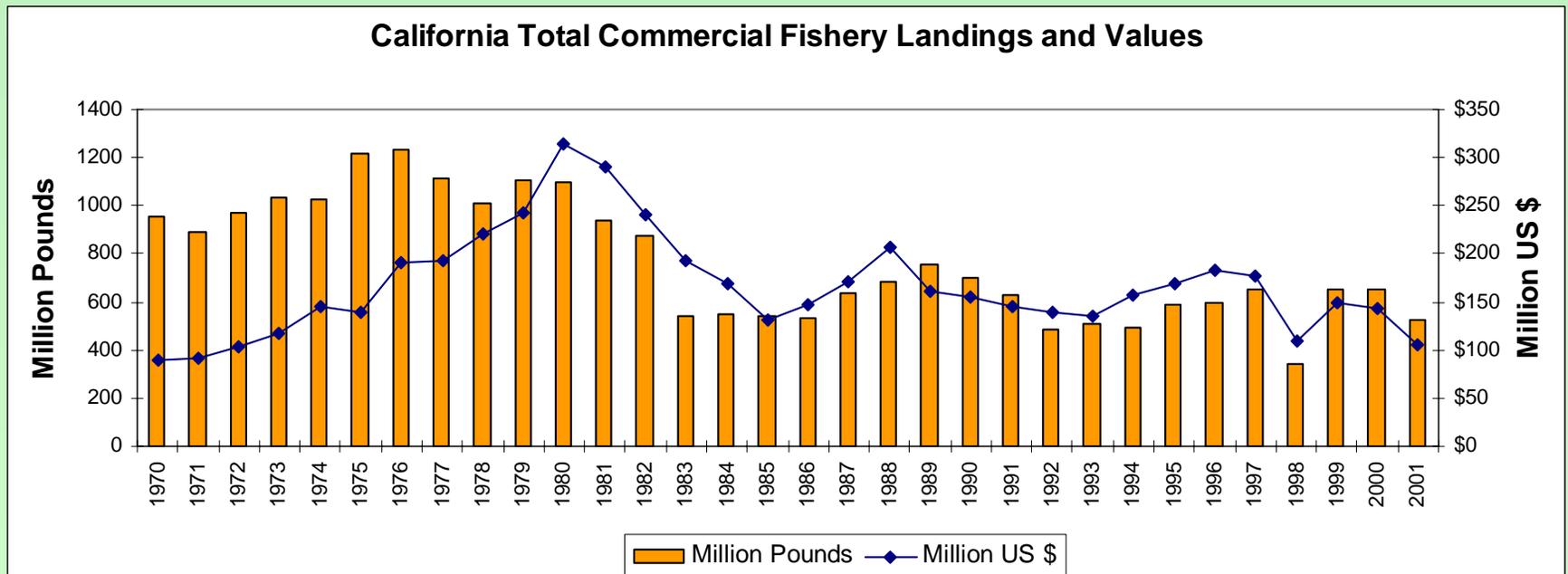
Industry	1990 GSP in \$Millions	2000 GSP in \$Millions	Change in GSP in \$Millions	Percent Change
Fish Hatcheries & Aquaculture	\$38.5	\$35.4	-\$3.1	-8.1%
Fish Harvesting	\$179.8	\$98.6	-\$81.3	-45.2%
Seafood Processing	\$345.3	\$269.4	-\$75.9	-22.0%

- The sector's GSP decreased by 28.4%. Fish Hatcheries and Aquaculture decreased 8.1%. Fish harvesting decreased 45.2%. Seafood Processing decreased 22.0%.



# Commercial Fish Landings & Values

- Landings peaked in 1976 at nearly 1.3 billion pounds of seafood.
- Values peaked in 1980 at approximately \$320,000,000.
- In 2000, landings were near 500 million pounds and valued at \$100,000,000.



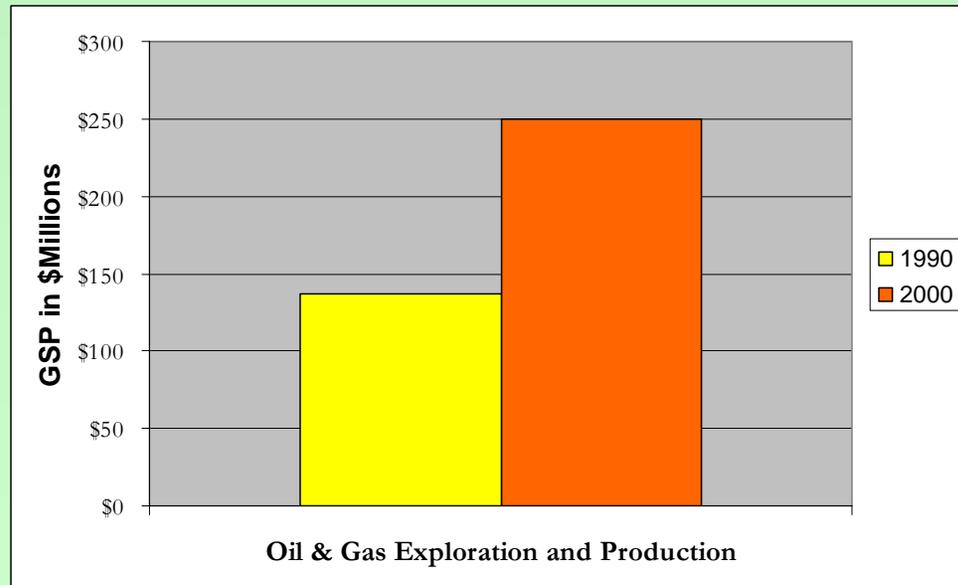
Source: NMFS

# Minerals GSP by Industry

- The Minerals sector contributed 1.9% to the total GSP of all the Ocean Economy sectors in California.

Industry	1990 GSP in \$Millions	2000 GSP in \$Millions	Change in GSP in \$Millions	Percent Change
Oil & Gas Exploration and Production	\$137.0	\$249.8	\$112.8	82.3%

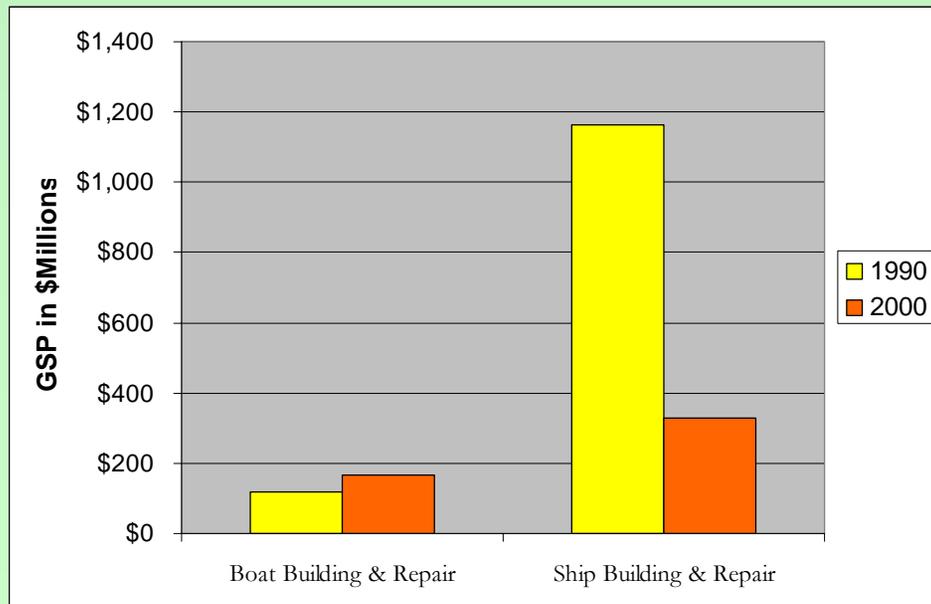
- The Oil & Gas Exploration and Production industry GSP increased by 82.3%.



# Ship & Boat Building GSP by Industry

- The Ship & Boat Building sector contributed 2.3% to California's total Ocean Economy GSP, or \$493,135,966 in 2000.
- The sector's GSP decreased 59.2%. Boat Building & Repair GSP increased 41.4%. Ship Building & Repair GSP decreased 71.8%.

Industry	1990 GSP in \$Millions	2000 GSP in \$Millions	Change in GSP in \$Millions	Percent Change
Boat Building & Repair	\$116.7	\$165.0	\$48.4	41.4%
Ship Building & Repair	\$1,165.3	\$328.1	-\$837.2	-71.8%



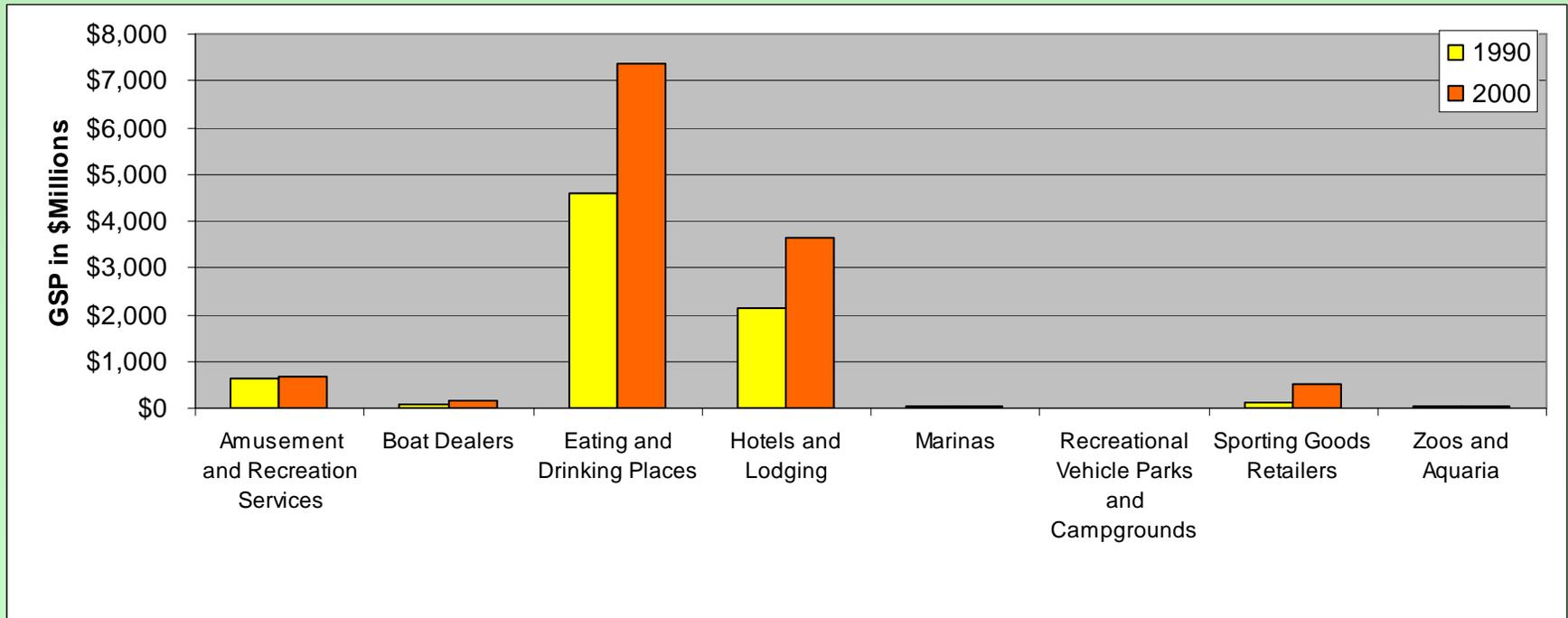
# Tourism & Recreation GSP by Industry

Industry	1990 GSP in Millions	2000 GSP in Millions	Change in GSP in Millions	Percent Change
Amusement and Recreation Services	\$648.7	\$688.8	\$40.1	6.2%
Amusement and Recreation Services NEC *	\$17.4	\$17.9	\$0.5	3.0%
Boat Dealers	\$92.0	\$139.8	\$47.8	52.0%
Eating and Drinking Places	\$4,586.4	\$7,350.3	\$2,763.9	60.3%
Hotels and Lodging	\$2,157.3	\$3,657.9	\$1,500.7	69.6%
Marinas	\$32.8	\$40.1	\$7.3	22.4%
Sporting Goods Retailers	\$129.0	\$501.7	\$372.7	288.9%
Zoos and Aquaria	\$26.2	\$30.1	\$3.9	14.8%
<b>Total</b>	<b>\$7,689.7</b>	<b>\$12,426.6</b>	<b>\$4,736.9</b>	<b>61.6%</b>

Data for Recreational Vehicle Parks & Campsites are not available

\*NEC: Not elsewhere classified

# Tourism & Recreation GSP by Industry



- The Tourism & Recreation sector contributed 58.0% to California's total Ocean Economy GSP, or close to \$12.5 billion in 2000.
- Eating and Drinking Places and Hotels and Lodging are the largest grossing industries in the Coastal Tourism & Recreation sector.

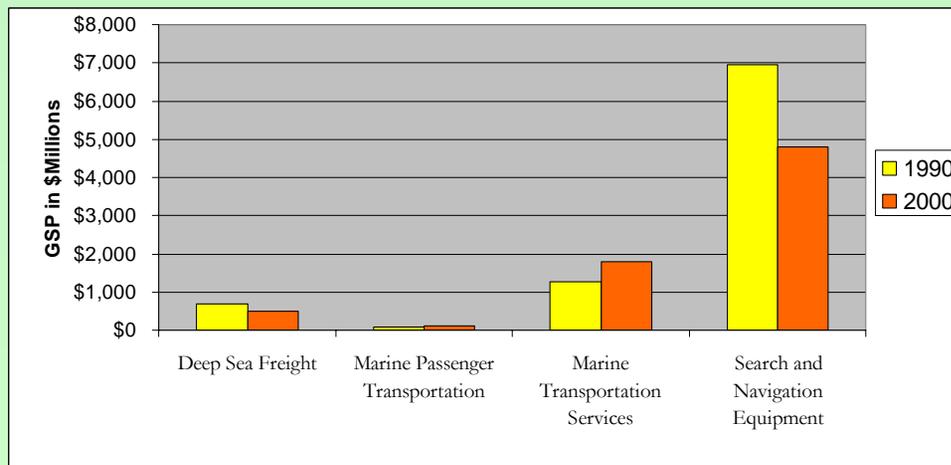
# Transportation GSP by Industry

- The Transportation sector contributed 34.5% to California's total Ocean Economy GSP or \$7,386,839,629 in 2000.

- The largest GSP growth was in Marine Passenger Transportation, which increased 62.4%.

Industry *	1990 GSP in \$Millions	2000 GSP in \$Millions	Change in GSP in \$Millions	Percent Change
Deep Sea Freight	\$686.7	\$503.9	\$10.8	26.6%
Marine Passenger Transportation	\$69.9	\$113.5	\$320.9	62.4%
Marine Transportation Services	\$1,258.2	\$1,784.8	\$123.3	41.9%
Search and Navigation Equipment	\$6,969.7	\$4,788.5	-\$260.2	31.3%

\* Data for Warehousing are not available due to data suppression.



# Data Sources

- The data in this report, unless cited otherwise, are available on the website for the National Ocean Economics Program. A detailed description of the estimation methodology for the Ocean Economy also is available. [www.OceanEconomics.org](http://www.OceanEconomics.org)
- Employment and wage data are derived from the Quarterly Census of Employment and Wages, a cooperative program of state employment agencies and the Bureau of Labor Statistics. [www.bls.gov](http://www.bls.gov)
- GSP data are estimated based on information from the Bureau of Economic Analysis. <http://www.bea.doc.gov/>
- Population and housing data are from the Bureau of the Census. [www.census.gov](http://www.census.gov)
- Estimating methods for all data sources are described in <http://www.OceanEconomics.org/Download/NOEPMMethod8.pdf>

The data contained in this report are part of an ongoing research project, and are subject to future revision.