



STATE OF THE WORKFORCE

2018



East Cascades
WORKS

Connecting Talent To Opportunity

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Greetings,

It is with great enthusiasm that we present our first comprehensive workforce report specific to the East Cascades Workforce Area. The East Cascades encompass ten Oregon counties (Hood River, Wasco, Sherman, Gilliam, Wheeler, Jefferson, Deschutes, Crook, Klamath and Lake) that span nearly 30,000 square miles with a population approaching 350,000 people. This report is a snapshot in time of our area's demographics, workforce, economy, trends and projections. Although our area is vast and encompasses both extremely rural and urban communities, East Cascades Works is dedicated to supporting the talent needs of employers, and maximizing and aligning investments in the career goals of individuals to fuel a thriving economy across the region.

I am energized by the inspiring collaborative efforts I see across the East Cascades. Partnership is essential and East Cascades boasts some of the most integrated WorkSource centers in the state of Oregon, offering job seekers and businesses a robust array of services from many partners. These effective partnerships give me confidence that together we will cultivate a homegrown talent pipeline to address industry's talent needs.

This report would not be possible without the tireless efforts of our partners Damon Runberg and Karla Castillo from Oregon Employment Department's Research Division. Damon in particular supported the gathering and organization of the data as well as narrative content. I would also like to thank East Cascades Works' own Cynthia Crossman for her coordination and editing efforts that made this report possible.

Together, let's get to work!

Heather Ficht, Executive Director

East Cascades Works ... Connecting Talent to Opportunity

East Cascades Works Board of Directors



ECW board photo from left to right:

Jennifer Newby, Roberto Gutierrez, Molly Joubert, David Burger, Brad Porterfield, Mark Warne, Robbie Smith, Sam Meier, Wally Corwin, Amy Gibbs, Jim Sanders **Not pictured:** Shawn Armstrong, Ellyn Craven, Lisa Farquharson, Julie Matthews, Kelly McGarva, Mike Peterson, Heather Tramp, Gary North and Lisa Dobey.



Community and Economic Indicators

POPULATION AND DEMOGRAPHICS

The pace of population growth in the East Cascades was faster than that of either Oregon or the nation.



Cascade Mountains

The East Cascades Workforce Area (East Cascades) is a ten county region in Oregon designated by then Governor John Kitzhaber in 2015 that primarily borders the east slope of the Cascade Mountains. The East Cascades covers nearly 30,000 square miles and runs from the Washington border in the north to the California boarder in the south and encompasses Hood River, Wasco, Sherman, Gilliam, Wheeler, Crook, Jefferson, Deschutes, Klamath and Lake Counties.

There are three distinct Sub-regions or labor sheds in the East Cascades. The North Sub-region is concentrated along the Columbia River Gorge and the Columbia Plateau, including the counties of Hood River, Wasco, Wheeler, Gilliam, and Sherman. The Central Sub-region is commonly known as “Central Oregon” in the High Desert, including the counties of Deschutes, Crook and Jefferson. Finally, the South Sub-region encompasses the Klamath Basin and the ancient lake basins in Klamath and Lake Counties.

The East Cascades is a fast growing region in the state. The pace of population growth from 2010 to 2016 was notably faster in the East Cascades (+8%) than either the state (+6.2%) or nation (+3.8%). Much of this growth is being driven by in-migration. The Central Sub-region is among the fastest growing communities in the nation with growth primarily concentrated around the Bend-Redmond metro area.



The Hispanic or Latino (of any race) population is the largest ethnic-minority group in the East Cascades and that population continues to grow. The highest concentration of Hispanics or Latinos is in the North Sub-region where there is a large agriculture sector. Hispanics or Latinos account for 21.5% of the population in the North Sub-region compared to 11.2% in the South and 8.9% in Central.



Airplane fuselage halves being bonded together at Composite Approach in Redmond.

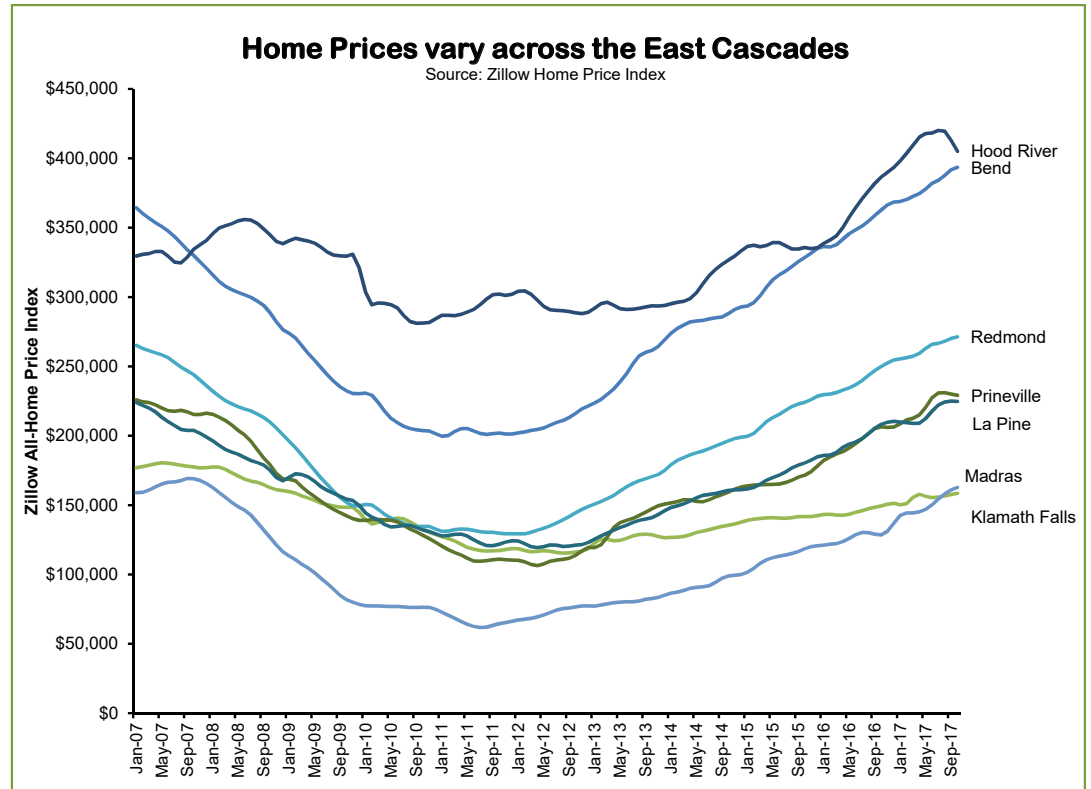
The largest racial-minority population in the East Cascades are Native Americans with several First Nation tribes residing in the area. The Confederated Tribes of Warm Springs which includes the Wasco, Tenino (Warm Springs) and Paiute bands, have a reservation located on 1,000 square miles predominately in Jefferson and Wasco Counties. The largest share of the Native population resides within Jefferson County at 17.7% of the countywide population. The Klamath Tribes, which include Klamath, Modoc and Yahooskin peoples reside predominately in Klamath County near the community of Chiloquin.

The East Cascades is much less diverse than the state of Oregon when looking at racial or ethnic demographics. However, there is a distinct urban and rural divide across the region providing a diversity of values and experiences. East Cascades covers 28% of the entire state of Oregon but is home to less than 9% of the state's total population. This population is largely concentrated in Bend, Redmond, Klamath Falls, The Dalles, and Hood River. Many of the rural counties are sparsely populated with less than one person per square mile in Wheeler and Lake Counties. Deschutes County (Bend-Redmond Metropolitan Statistical Area) is the lone metropolitan area in Oregon east of the Cascade Mountains and is by far the largest population center in the East Cascades with a population of 176,600, approximately half of the population of the entire East Cascades area.



HOUSING

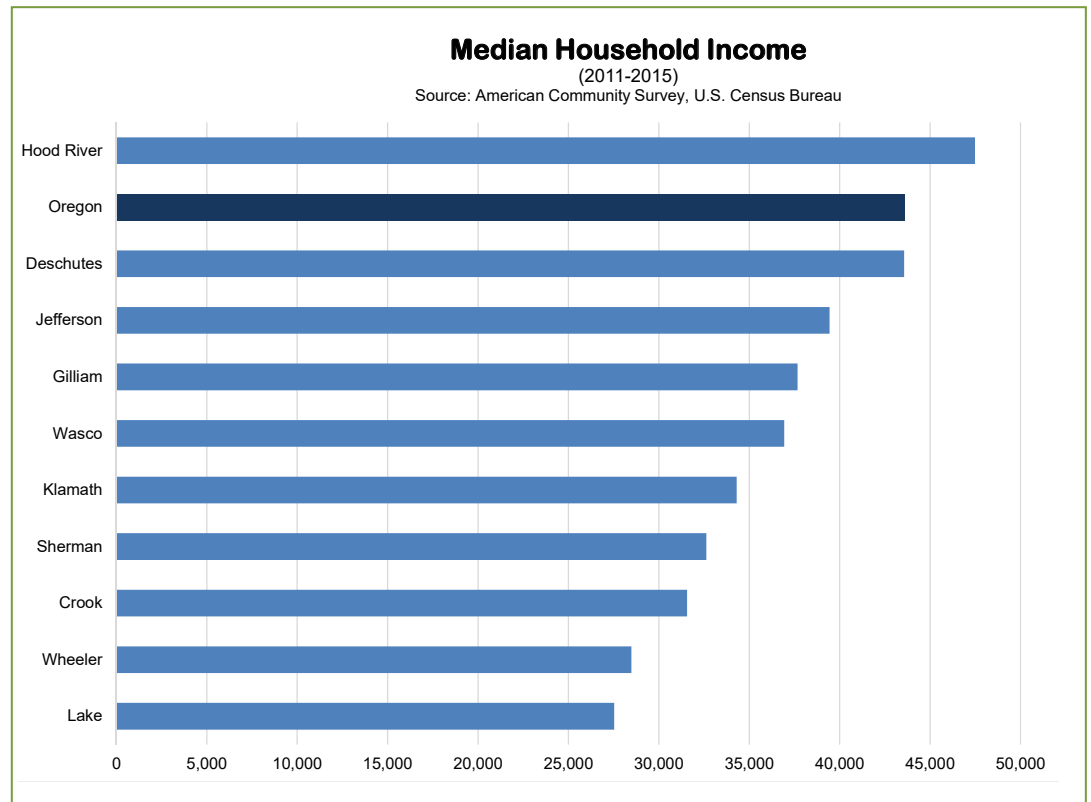
After significant home depreciation during the most recent recession home prices in most East Cascades communities are currently at or above pre-recession peaks. The cost of housing varies greatly across the region with the larger population hubs experiencing more acute challenges with rapidly rising home values and decreasing availability of housing.



The median annual earnings for full-time workers ranges from \$33,000-\$43,000

INCOME

Incomes are notably lower in the East Cascades than the state of Oregon with the median household income lower than the state for every county except Deschutes and Hood River Counties. Within East Cascades, the median annual earnings for full-time workers ranges from approximately \$33,000 in Crook County to over \$43,000 in Sherman County, which is slightly higher than the state average. Incomes are lower for a variety of reasons. First, there is a lower concentration of high paying industries in the East Cascades compared to the large population centers in the Portland area or along



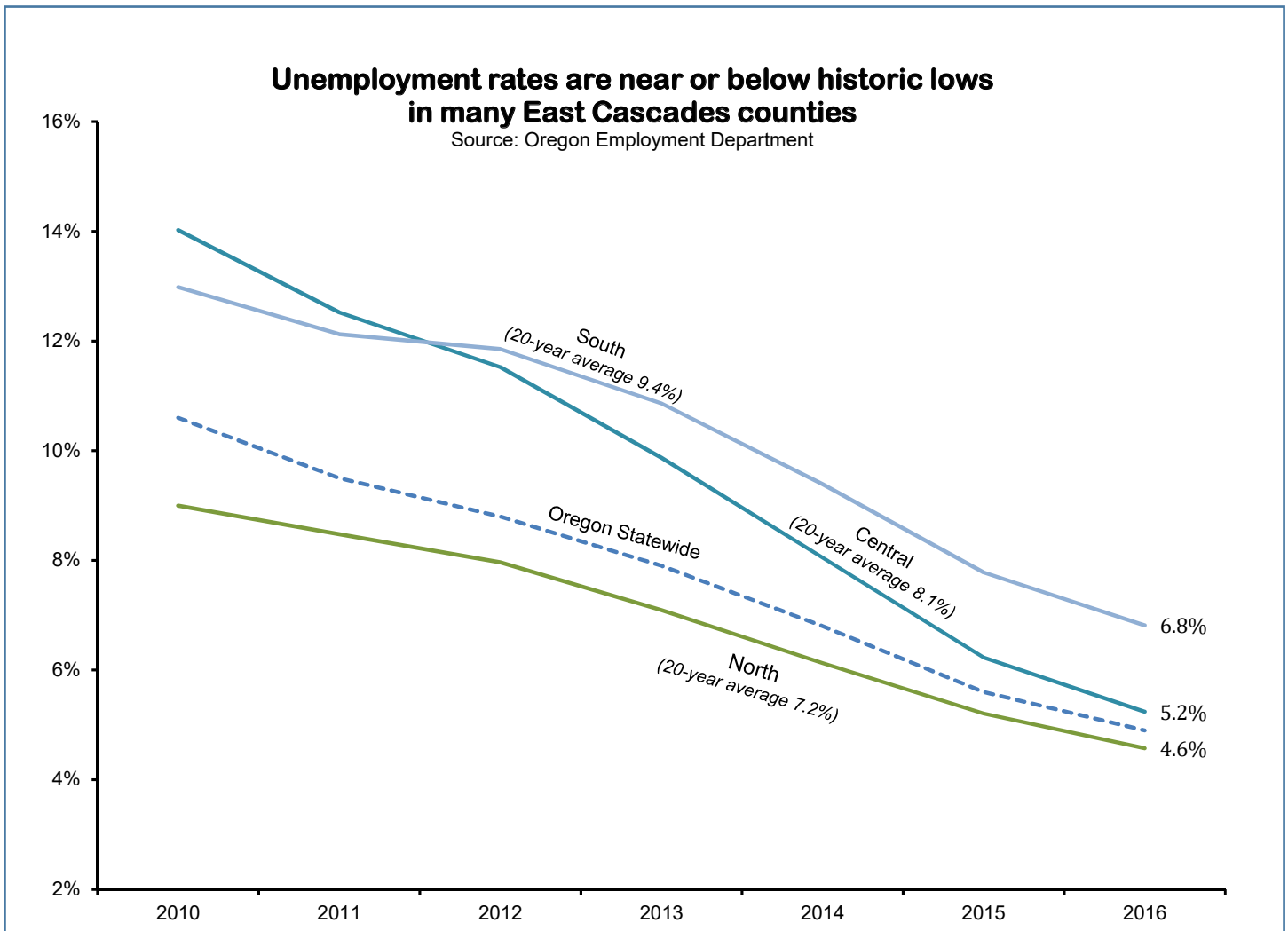
the Willamette Valley. Second, the cost of living is notably lower than other parts of the state (with the exception of Deschutes and Hood River Counties), meaning that lower wages don't necessarily translate into less disposable income.



Characteristics of the Workforce

UNEMPLOYMENT AND LABOR FORCE

Unemployment levels are down to near record lows across most counties in the East Cascades. The 2016 annual average unemployment rate for North and Central were in line with the statewide average of 5% while the rate was closer to 7% in the South. The labor force has been on the decline for much of the East Cascades since 2010. The one exception is Deschutes County, which has seen rapid growth due to strong population increases from working age groups. The labor force declines are predominately being driven by retirees due to an aging workforce; however some of these declines are structural as many communities have seen long-term declines in core industries, such as wood product manufacturing.

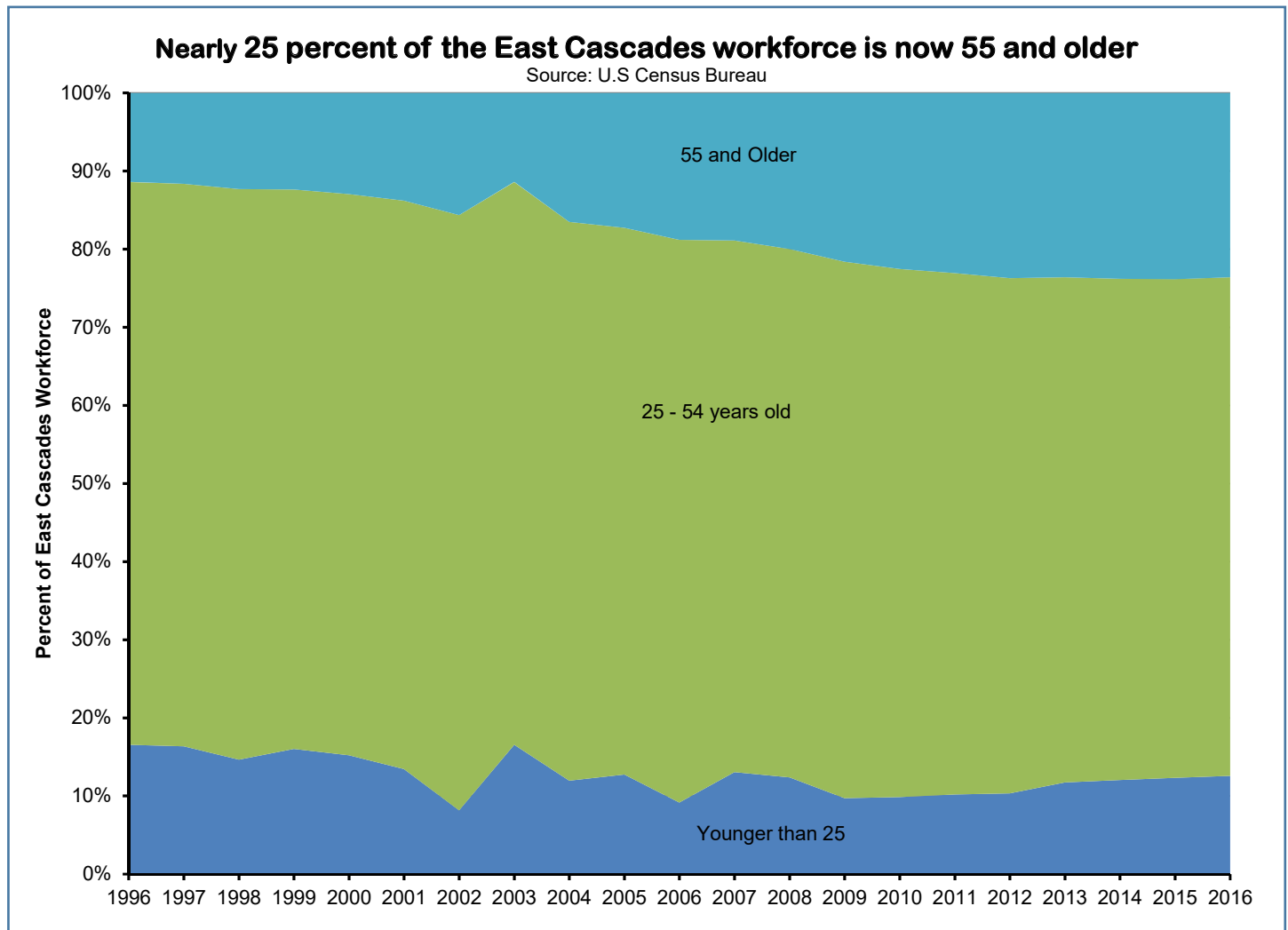


Unemployment levels are down to near record lows across most counties in the East Cascades.



AGE OF WORKFORCE

The workforce in East Cascades has been aging rapidly over the past two decades. Those aged 55 and older rose from 12% of the workforce in 1996 to 25% in 2016. The aging of the workforce seems to have stalled the past several years as the bulk of the baby boomers have moved into this older cohort. As this older demographic begins to retire there will be large labor and skills gaps to replace this experienced workforce.



As this older demographic begins to retire there will be large labor and skills gaps to replace this experienced workforce.

The youth workforce as a share of total employment is below their share from 20 years ago. This is due to today's youth population being smaller as a share of total population. Fewer youth equals fewer youth workers. Second, the long recession provided few employment opportunities for young workers. Traditional youth employment opportunities were filled by older and more experienced workers when levels of unemployment were high. However, there has been a subtle rebound in youth employment over the past three years. Those aged 16-21 years saw the largest percent gains in the number of employed workers for all three regions between 2013 and 2016. The short-term gains in youth employment are likely due to significant job openings in entry level occupations, growth in tourism, and a slowdown of the "brain drain."

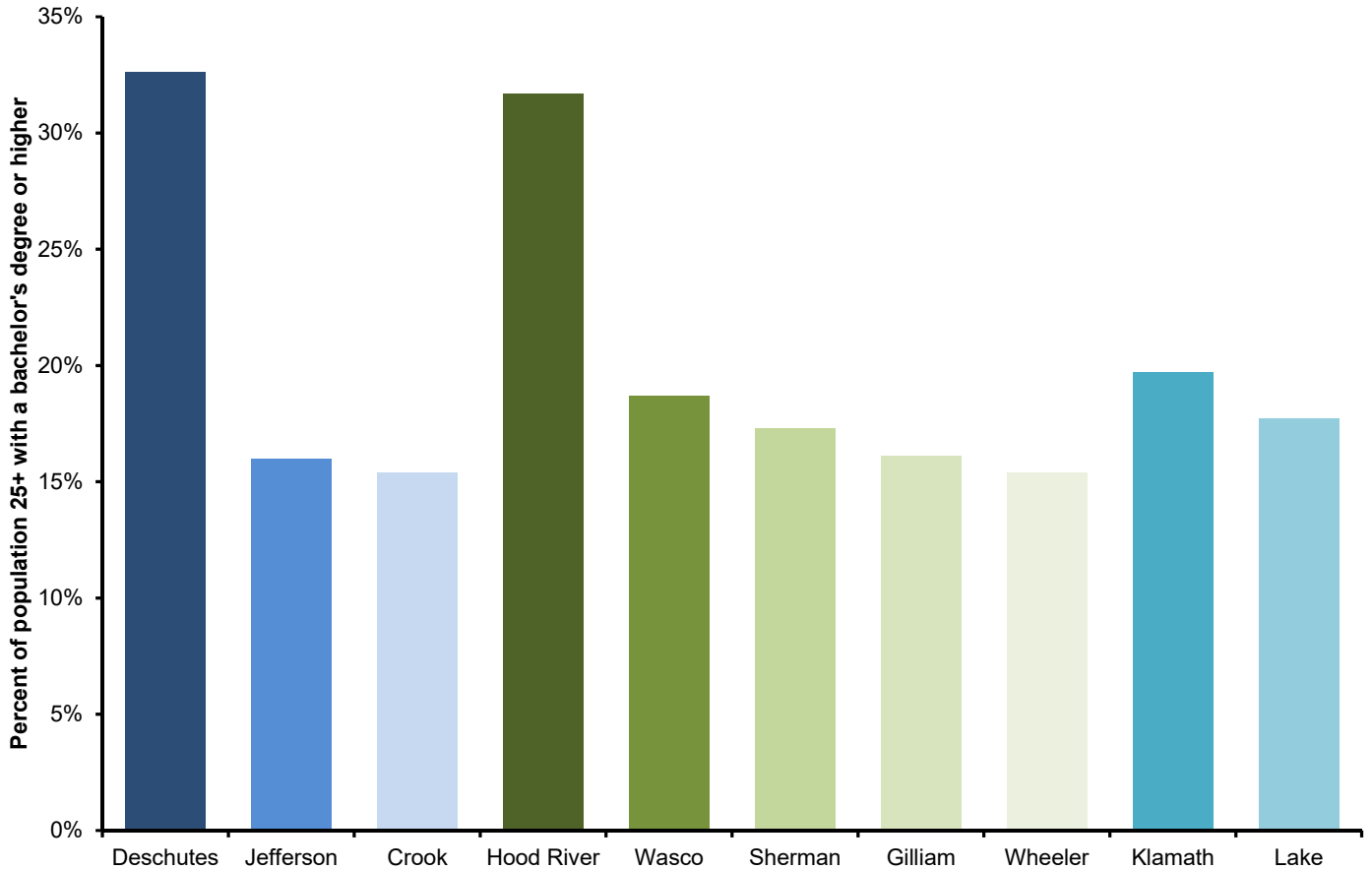


EDUCATION LEVELS

Residents in Hood River and Deschutes counties have much higher levels of education than other counties in the East Cascades. Much of the discrepancy in educational attainment can be explained by industry composition. For example, Wasco County has a similar number of jobs as Hood River County yet there is a notable disparity in the share of the population with a college degree. The professional sector, an industry that often requires higher levels of education, accounts for nearly 10% of all nonfarm jobs in Hood River County, but only around 5% in Wasco County.

Higher levels of educational attainment are in the region's employment hubs

Source: American Community Survey, U.S. Census Bureau, 2011-2015 (5-year estimates)



*Public school students
in the East Cascades
complete high school
at similar or higher
rates than the state
of Oregon average.*

There are more than 53,000 students enrolled in K-12 public schools across the 26 school districts in the East Cascades with half of those students attending a school in Deschutes County. The majority of the students in the East Cascades are educated in districts with a similar or higher completion rate than the state average.

Nearly half of the students attending a Jefferson County school and nearly 40% of those attending a Hood River school have benefited from English Language Learning instruction. This is a support for students for whom English is not their first language.



The East Cascades is home to three Community Colleges, including Columbia Gorge, Central Oregon and Klamath Community Colleges. In addition, there are also two 4-year universities; Oregon State University–Cascades and Oregon Institute of Technology.

Community College enrollment was up following the recession but has been on the decline in the years since. Higher education tends to be countercyclical, meaning that enrollment patterns move in the opposite direction as the local economy. During the recession enrollments rose as workers looked to reskill for a new career. Today, enrollments are down since employment opportunities abound for people with diverse skillsets.

Community College Enrollment

Fall full-time equivalent

Source: Higher Education Coordinating Commission

	Central Oregon	Columbia Gorge	Klamath
2012	2,173	308	487
2013	1,913	308	483
2014	1,922	297	451
2015	1,777	267	539
2016	1,722	277	408
2017	1,627	253	472
5-Year Change	-546	-55	-15
% Change	-25.1%	-17.9%	-3.1%

COMMUTING PATTERNS

Much of the rural East Cascades workforce commutes to employment centers, such as Bend, Redmond, Hood River, The Dalles, and Klamath Falls. Nearly 60% of the workers in the region's rural counties commute to a job in a different county, whereas only around 31% of workers in the employment hub counties (Deschutes, Klamath, Wasco, and Hood River) commute to a job in a different county.

Another way to show the commuting patterns between rural and urban counties is to look at the discrepancy between jobs in local businesses and the number of employed residents. In Crook County the number of jobs within businesses located in Crook County is down by 8% over the past 15 years, yet the number of employed residents living in Crook County is up over 7% during the same period. Seemingly contradictory statistics. Employment opportunities in these rural businesses are fewer than they were over a decade ago, but rural residents are employed at a high-rate as there is increased commuting into the region's employment hubs. We are seeing places like Crook County becoming more of a "bedroom" community for workers employed in Redmond and Bend. This may be driven by fewer employment opportunities in rural communities, but is also a reflection of the rapid increase in home prices in urban centers. There is greater availability of housing in our rural communities and those homes are much more affordable, even when accounting for increased commute costs.

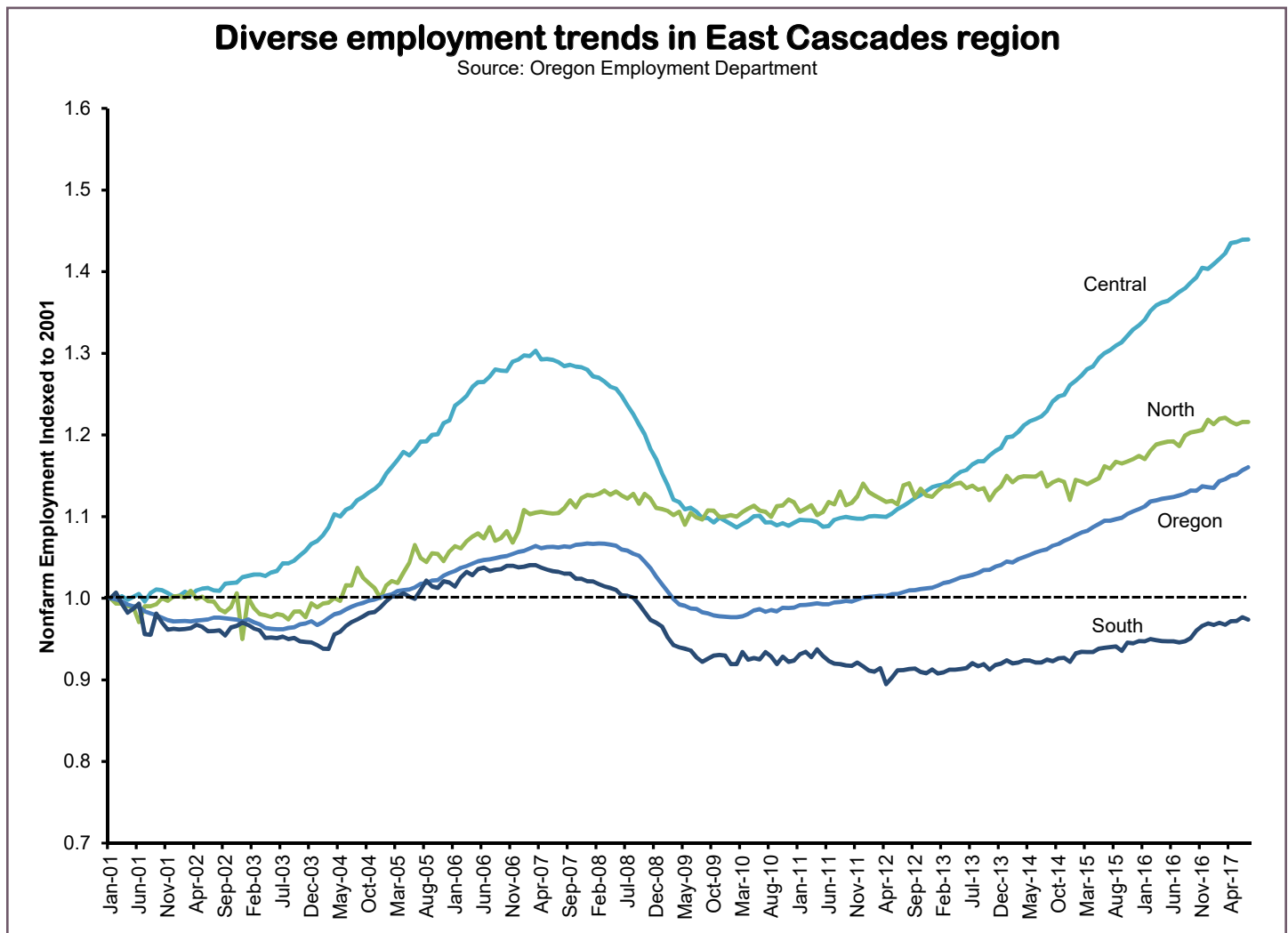
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Employment Trends RECOVERY AND EXPANSION

Deschutes County has been one of the fastest growing metro economies in the nation for the past several years.

The most recent recession was devastating to many communities in the East Cascades, particularly in the Central region where the share of jobs lost was amongst the highest in the nation. The East Cascades poorly resisted the most recent recession due to a high concentration of jobs in construction and the wood products sector. The North Sub-region was an exception to this rule as job losses were more muted due in part to the strong agricultural sector.



The recovery and subsequent expansion have been mixed across the region. The North Sub-region recovered from a shallow recession with slow and stable employment gains the past several years. The Central Sub-region recovered from the recession in 2015 and continues to expand today. Most of Central's job gains are concentrated in Deschutes County, which has been one of the fastest growing metro economies in the nation the past several years. The South Sub-region is still in recovery mode with employment levels below the previous peak in 2007. The pace of job growth has been much slower in Klamath and Lake Counties the past several years than other parts of the East Cascades.

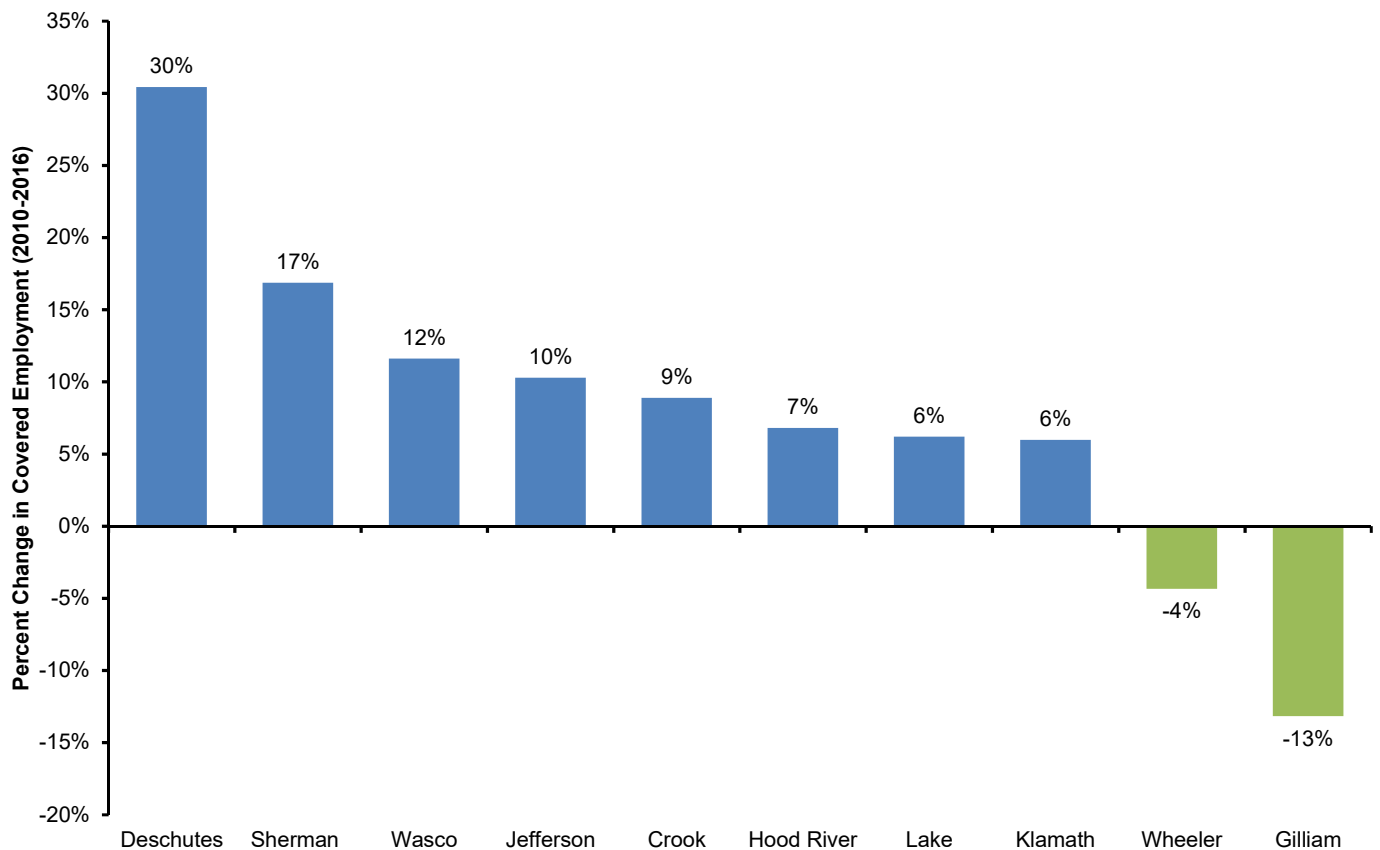


TOTAL NONFARM

Total Covered Employment, the number of workers covered by unemployment insurance, is up significantly across the East Cascades since the depths of the recession in 2010. Gains are most pronounced in Central Oregon where there are over 19,000 additional jobs, a gain of 27% since 2010, which accounts for most of the job growth. In fact, Deschutes County's job gains over the past 6 years account for 94% of all jobs added in Central Oregon and nearly 80% of all jobs added in the East Cascades.

Most counties in the East Cascades have seen strong gains in covered employment following the most recent recession

Source: Oregon Employment Department



"I believe in workforce development because it is an investment in our economic future."

Steve Kramer, Wasco County Commissioner
Chief Local Elected Official
Central Oregon Workforce Consortium

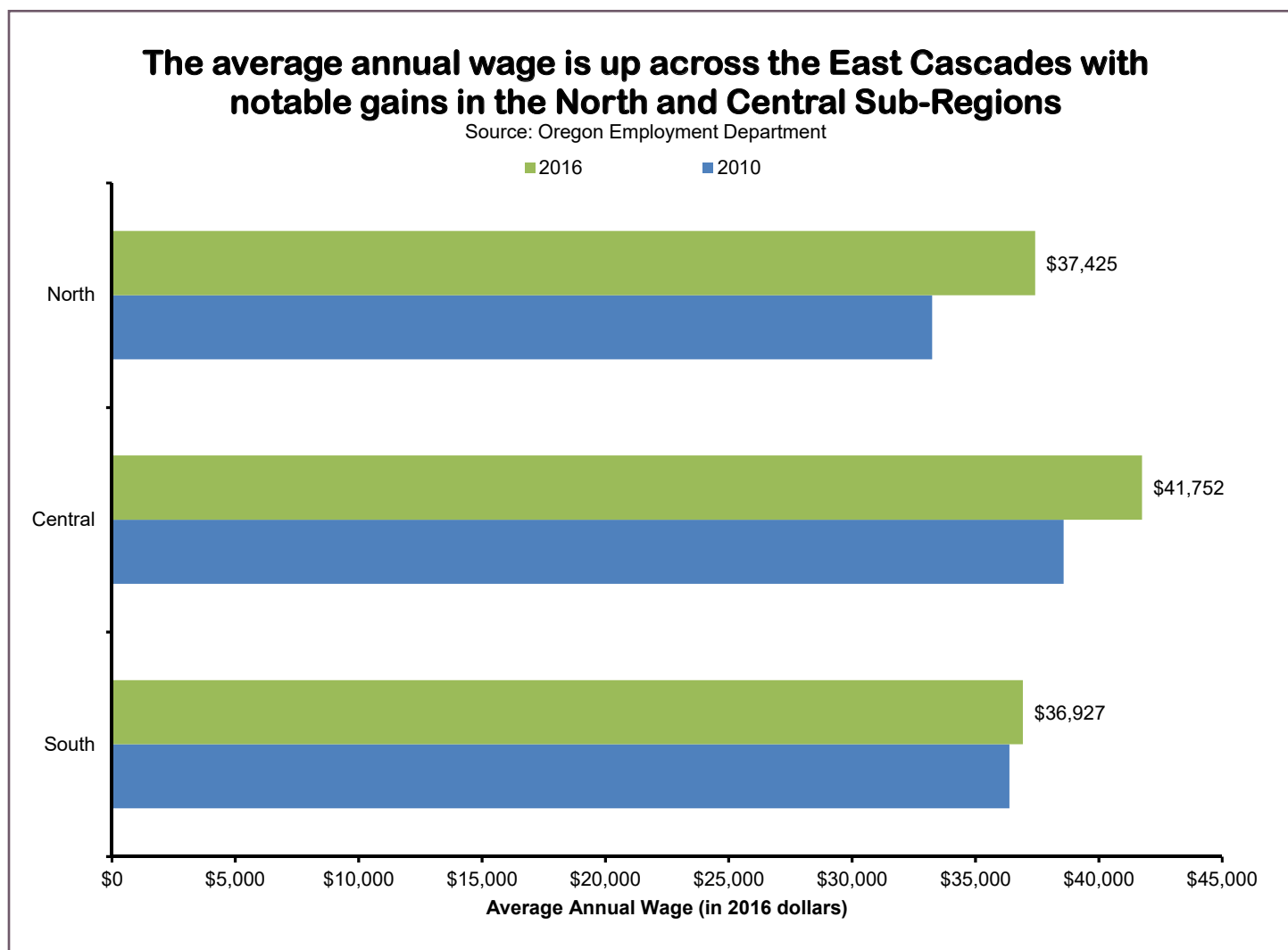


“We are at the start of a significant change in employment. Our rural central region will either adapt or fail. I joined the board to innovate that transition.”

**Wally Corwin, JELD-WEN, Inc.
East Cascades Works Board Chair**

After adjusting for inflation, both total payroll and the average annual wages rose markedly across the East Cascades over the past 6 years. The real growth in the average annual wage is largely the result of job growth in higher paying industries such as professional and technical services, health care, and a rebounding construction industry.

Wage growth has been more subdued in the South with Klamath and Lake Counties only seeing marginal improvement since 2010. A large share of employment losses in Klamath County were in higher paying industries, while job growth has been concentrated in lower paying industries.





Cattle in Lake County at McGarva Ranch Pasture Division.

FARM EMPLOYMENT

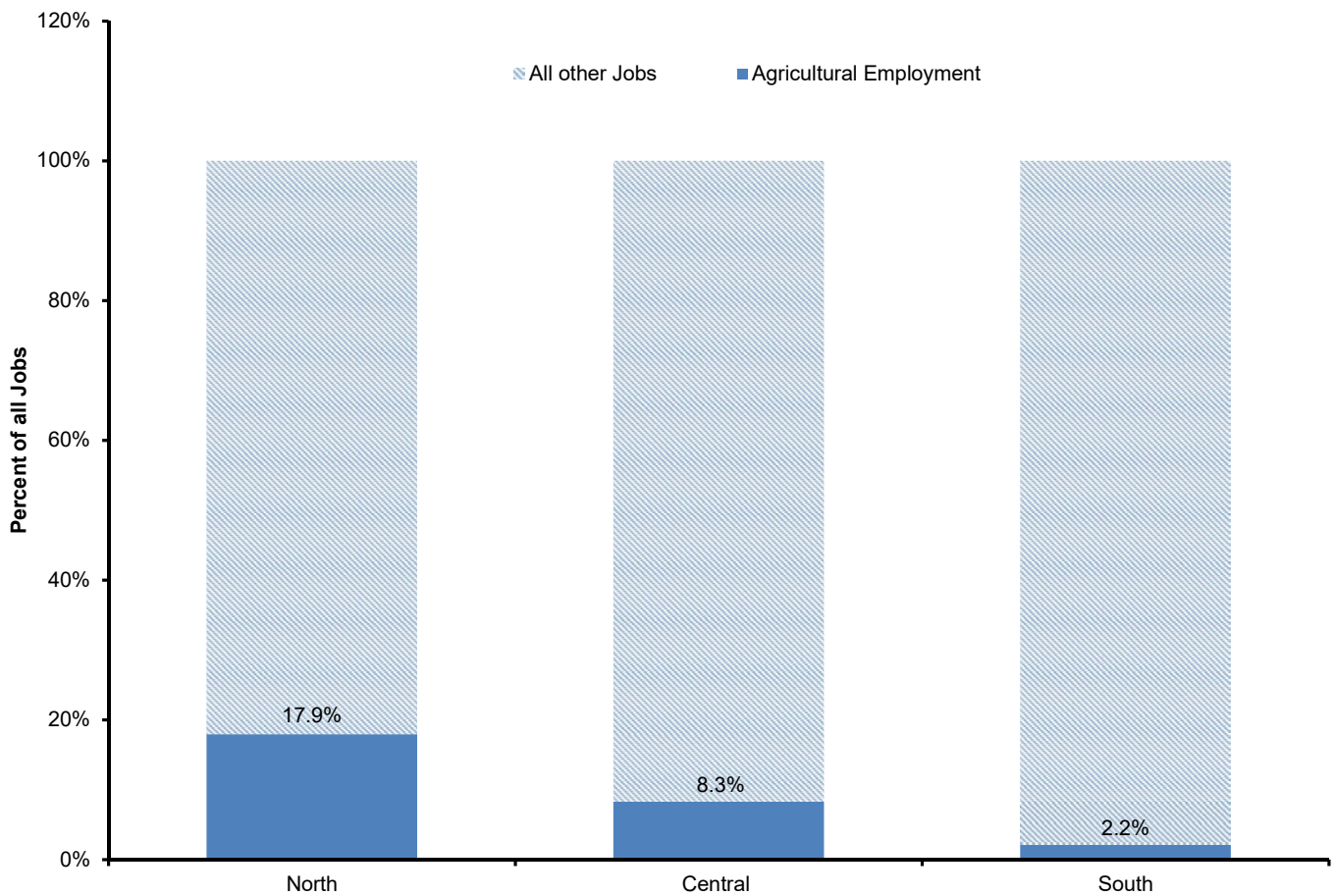
Agriculture is an important industry sector in the East Cascades, but is largely excluded from traditional economic indicators. In the Columbia Gorge agricultural employment makes up roughly 18% of all jobs and around 8% in Klamath and Lakes Counties. Some of the fastest growing agricultural regions in the state are concentrated in the East Cascades. Employment in agriculture expanded by 10% in the North (+450 jobs) between 2005 and 2015, while the South's agriculture industry expanded by 8.3% (+150 jobs) despite struggling through severe drought conditions.

Agricultural commodities are diverse across the region with a large concentration of high value fruits and grapes, as well as, grains in the North. In Central the primary crop is carrot seed, predominately in Jefferson County, as well as, a sizable livestock sector. Although the South's agricultural commodities are largely dominated by cattle and feed grain, other diverse crops like potatoes and garlic are also produced.

Some of the fastest growing agricultural regions in the state are concentrated in the East Cascades.

Agriculture Employment in East Cascades

Source: Oregon Employment Department



INDUSTRY EMPLOYMENT

There are mixed trends among the non-agricultural industries across the region. Although there have been recent strong gains in construction, the industry remains below the levels seen during the housing bubble. Manufacturing was one of the hardest hit industries during the recession as much of the employment was concentrated in wood products that helped to supply home construction. Although still below the prerecession peak, manufacturing is experiencing a resurgence in many communities across the region with growth in beverage manufacturing and a diverse set of non-wood durable goods, such as composites, medical devices, and metals.

Financial activities, another industry largely tied to the housing market, remains significantly below prerecession levels. However, this is not an industry of specialization in the East Cascades with banking and investing activities largely concentrated in large metropolitan areas.

Retail trade has largely followed population trends. As the population has grown we have seen new grocery stores and other big box stores.

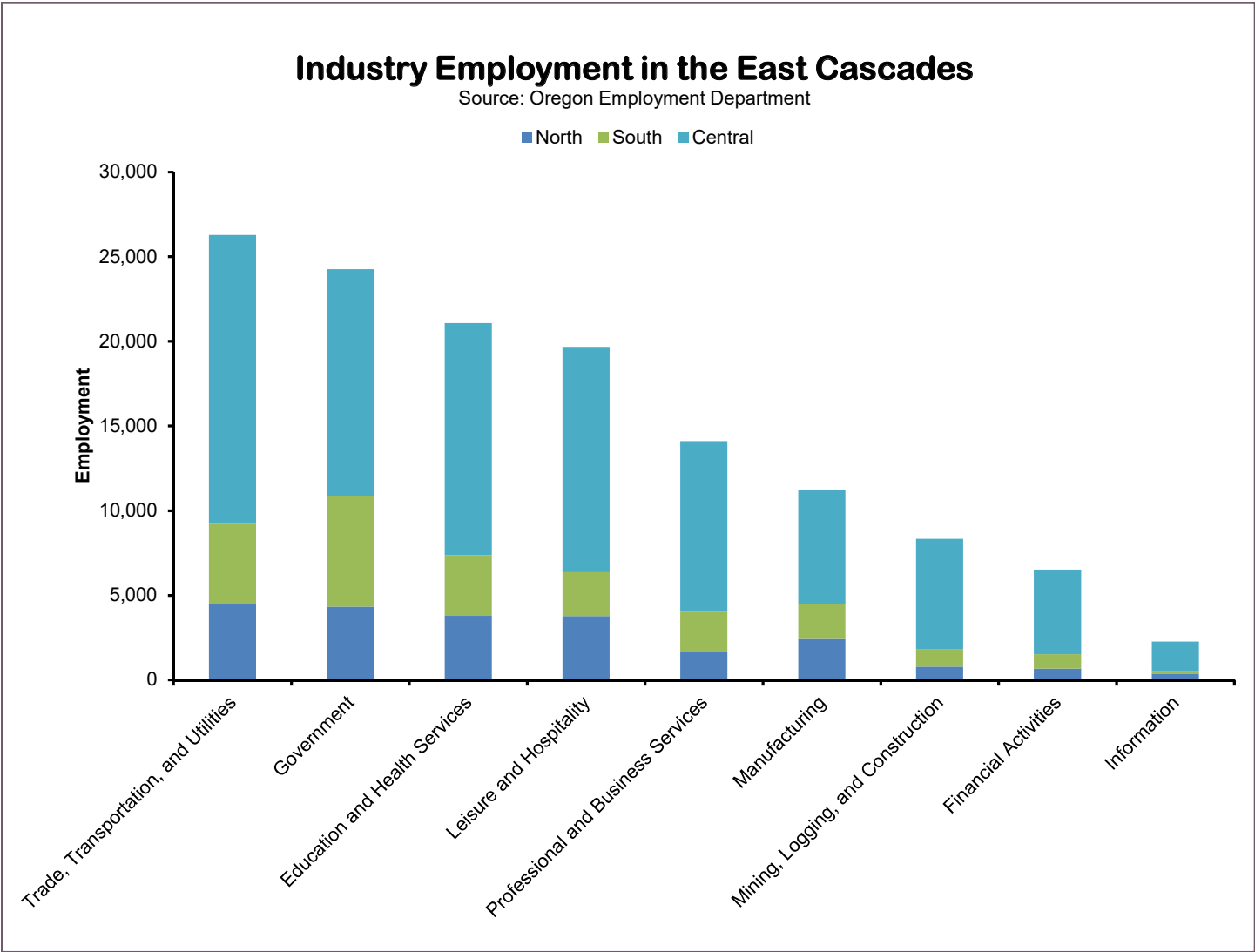
The public sector is a large employer in the region and is particularly important in rural communities that post a higher share of government jobs. Most government jobs are concentrated in school districts and local government. However, the East Cascades boasts a larger share of jobs in the federal government, in particular, the U.S. Forest Service and Bureau of Land Management. These agencies manage large swaths of public land in the region. Over 50% of the land in most counties in the East Cascades is publicly owned with the largest shares of public land in Deschutes (78%) and Lake (75%) counties.



The fastest growing industries across the East Cascades over the past decade were health care; professional and business services; and leisure and hospitality. Health care’s growth is due to both a growing population and an aging population. More people and older people result in an increased demand for health services. The Central Sub-region, in particular Bend, has transformed into a health hub for residents in much of rural Central and Eastern Oregon.

Professional and business services is another rapidly growing industry. The region’s reputation for quality of life and lifestyle amenities is attracting many smaller companies in the professional and technical sector to places like Bend and Hood River. This is a diverse and high-paying industry sector. Job growth in the professional and technical sector is one of the largest drivers behind the growth in the average annual wage.

The tourism industry is an important industry sector across the East Cascades that helped to pull many communities out of the recession. The region’s outdoor amenities and ample sunshine have long attracted tourists, but growth in this industry accelerated over the past decade. Although a lower-paying and largely seasonal industry, it provides important employment opportunities to unemployed and those new to the labor force.



Manufacturing is experiencing a resurgence in many communities across the region with growth in beverage manufacturing and a diverse set of non-wood durable goods, such as composites, medical devices, and metals.



Utilizing technology in the wood manufacturing process at Bright Wood Corp.

“The Central Oregon region has a long history of enjoying strong in-migration to satisfy our workforce needs. Now that the region is leading the nation in job creation and has a more diversified employment base, education and workforce training will be more important than ever to employers and to successful economic development in the future.”

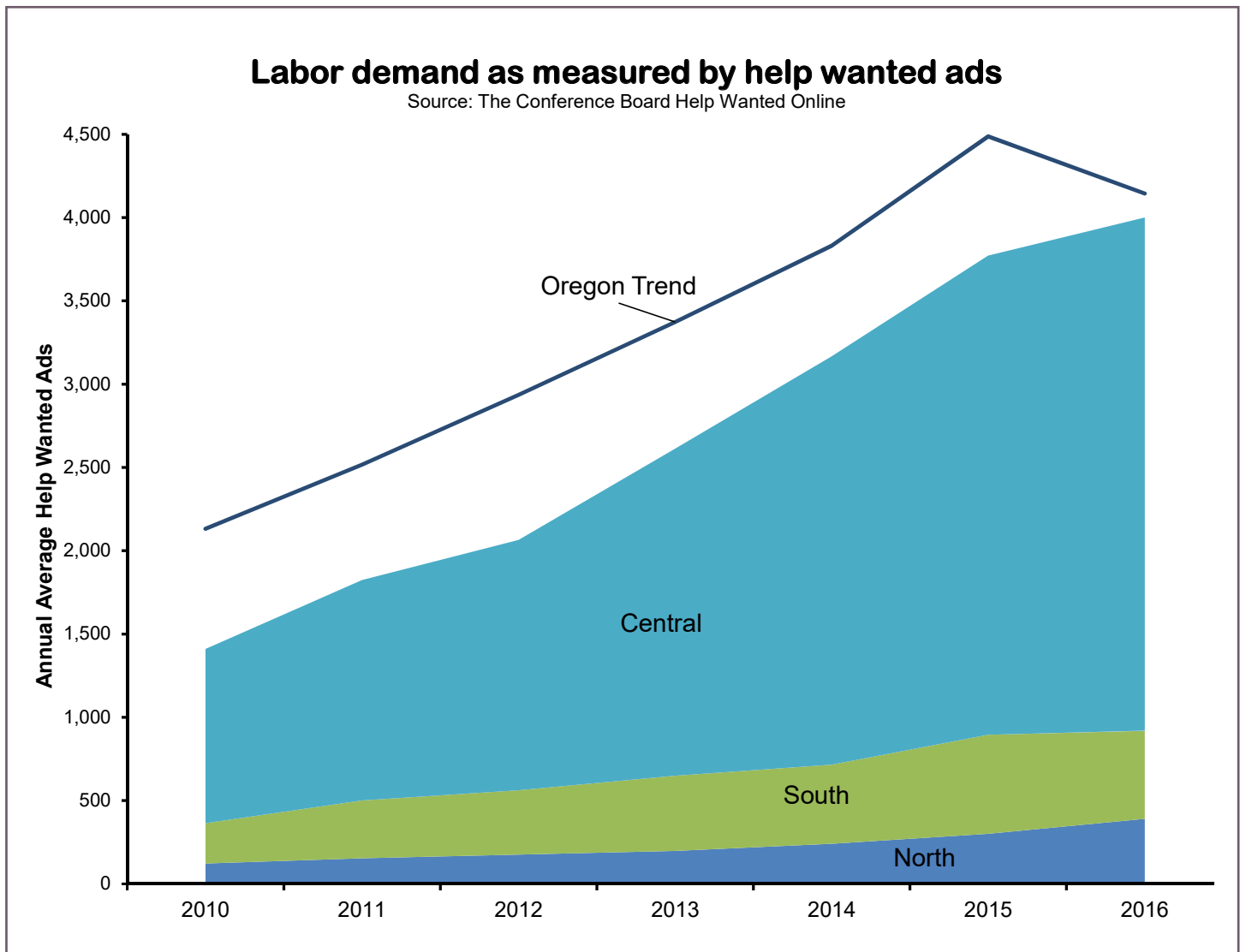
**Roger Lee, Executive Director
Economic Development of Central Oregon**





LABOR DEMAND

The demand for labor, as measured by help wanted ads, is up considerably over the past several years. Growth in labor demand is most noteworthy in the North and Central Sub-regions where help wanted ads rose by over 100% from their 2010 levels.



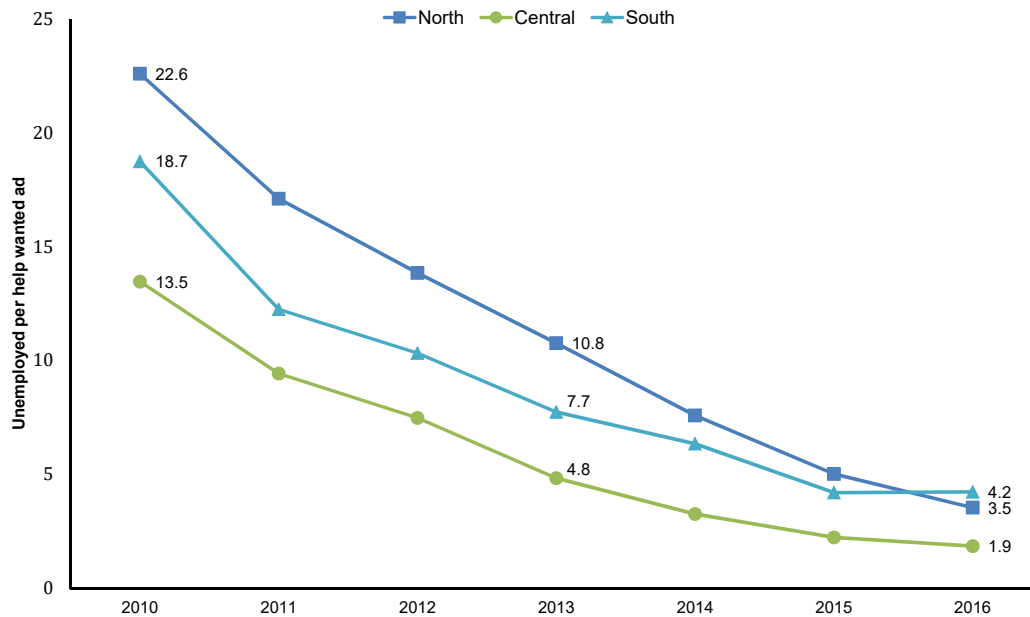
One way to determine whether or not an economy is in a “labor crisis” is to look at the number of unemployed people (labor supply) per help wanted ad (labor demand). Back in 2010 that ratio ranged from 22-14, which means that employers who were hiring had a large supply of labor to choose from. Fast forward to 2016 and we see that ratio has dropped significantly across all three areas. Both the North and South are experiencing a tightness in their labor supply; however the ratio is the tightest in Central Oregon where there are now fewer than two unemployed people per help wanted ad.

A tight labor supply is not always due to rapid hiring. In fast growing places like Deschutes County, the pace of job growth rapidly diminished the pool of available labor leading to a labor shortage. However, other communities are experiencing a labor shortage with only modest job gains. This is due to a decrease in the labor supply as older workers drop out of the labor force for retirement and few young people are back filling the labor pool. We are seeing this “job-less labor shortage” primarily in the more rural communities in the East Cascades.



The labor supply is very tight due to continued strong hiring demand and sluggish gains in the labor supply

Source: The Conference Board Help Wanted Online



Across the East Cascades, businesses reported that 65% of the vacancies they post are difficult to fill. Vacancies becoming increasingly more difficult to fill are higher paying positions. For instance, 96% of jobs that pay greater than \$25 an hour were reported as difficult to fill compared to only 55% of jobs that pay less than \$15 an hour.

It is not too surprising that industries with the most job vacancies also happen to be amongst the region's fastest growing industries. Leisure and hospitality, construction, health care, and professional and business services topped the list of most job vacancies in 2016. There is a high demand for labor in a variety of lower paying occupations, such as recreation attendants, retail salespersons, and food preparation workers. However, a few higher skilled and higher paying occupations posted a large number of job vacancies, including plumbers, customer service representatives, farmworkers, truck drivers, electricians, and construction laborers.

East Cascades Job Vacancies by Industry 2016

Source: Oregon Employment Department

INDUSTRIES

VACANCIES

All Industries

4,413

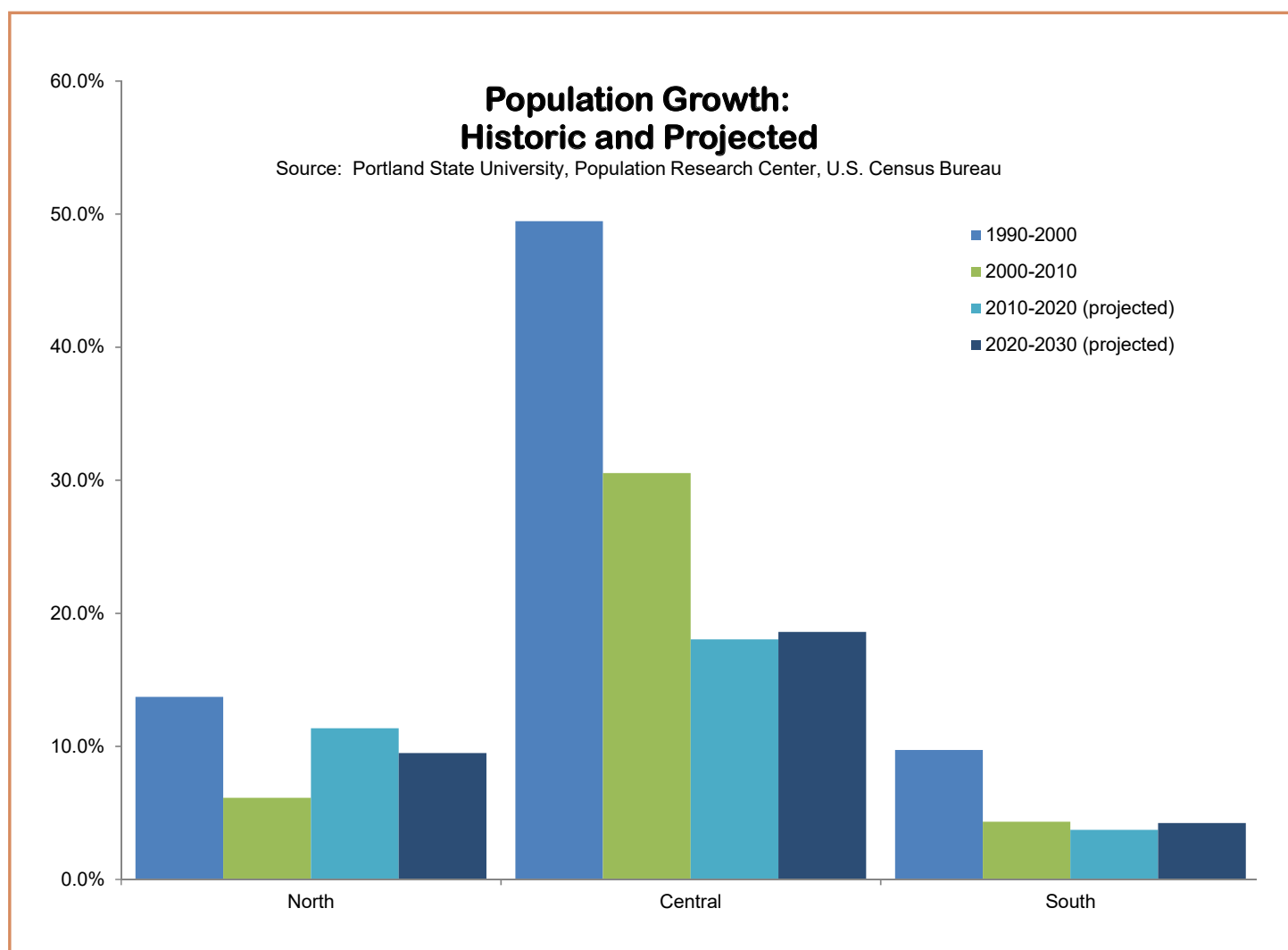
Leisure and hospitality.....	889
Construction.....	726
Health care and social assistance.....	547
Administrative, management, and waste services.....	389
Professional and technical services.....	365
Retail trade.....	332
Manufacturing.....	200
Transportation, warehousing, and utilities.....	164
Natural resources and mining.....	157
Financial activities.....	129
Wholesale trade.....	122
Information.....	12
Private educational services.....	3



The East Cascades population trends tend to mimic employment.

Portland State University recently began forecasting population for Oregon's counties and cities. They expect the Central Sub-region to be the fastest growing portion of the East Cascades by 2020. In fact, nearly 75% of the growth in the East Cascades population (+44,900) between 2010 and 2020 is expected to be concentrated in Deschutes County. Population growth in the North Sub-region is expected to be concentrated in Hood River County. Population growth in the South Sub-region is expected to be more subdued.

Population forecasts are slower in rural communities due to a combination of slow natural increase, or in some case negative natural increase (deaths outnumber births), as well as, slow net migration. In the East Cascades population trends tend to mimic employment. Geographic mobility is largely tied to employment opportunities or the lack thereof.





COIC youth learning the value of teamwork through fence construction.

EMPLOYMENT PROJECTIONS

The Oregon Employment Department develops 10-year industry and occupational projections of employment every two years. The most recent projections are for 2014-2024. The next cycle of projections (2016-2026) will be available in spring 2018. Employment projections vary greatly across the East Cascades with each sub-region expected to see different employment trends.

It is more apparent than ever that non-minimum wage workers will need an education beyond high school to work in today's knowledge-based economy. Community colleges are uniquely positioned to provide education and work skills training to that emerging workforce.

Roberto Gutierrez, President, Klamath Community College

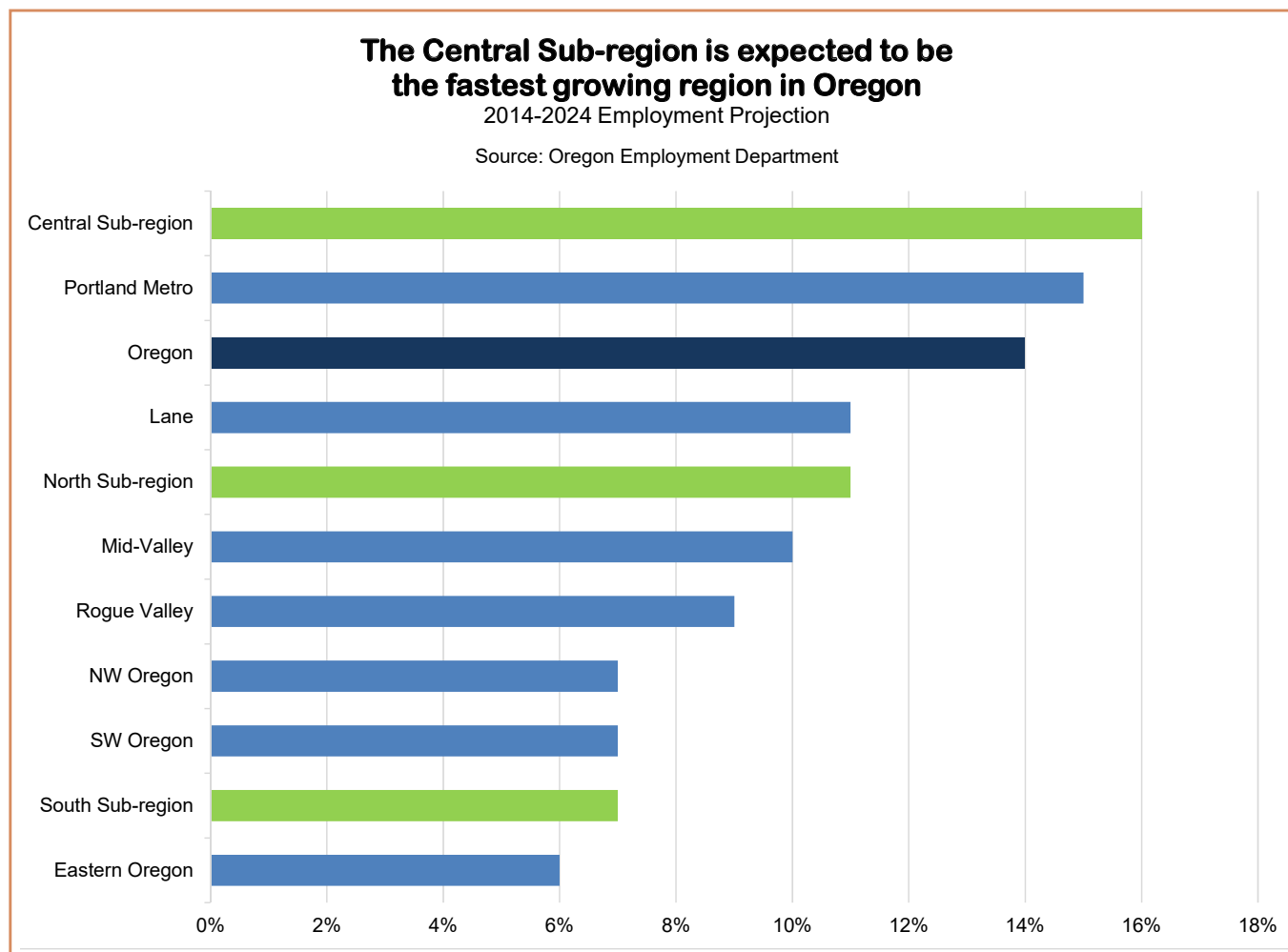




NORTH EMPLOYMENT PROJECTIONS

The North Sub-region along the Columbia Gorge is expected to add 3,200 jobs (+11%) between 2014 and 2024, which is slower growth than the state as a whole at 14%.

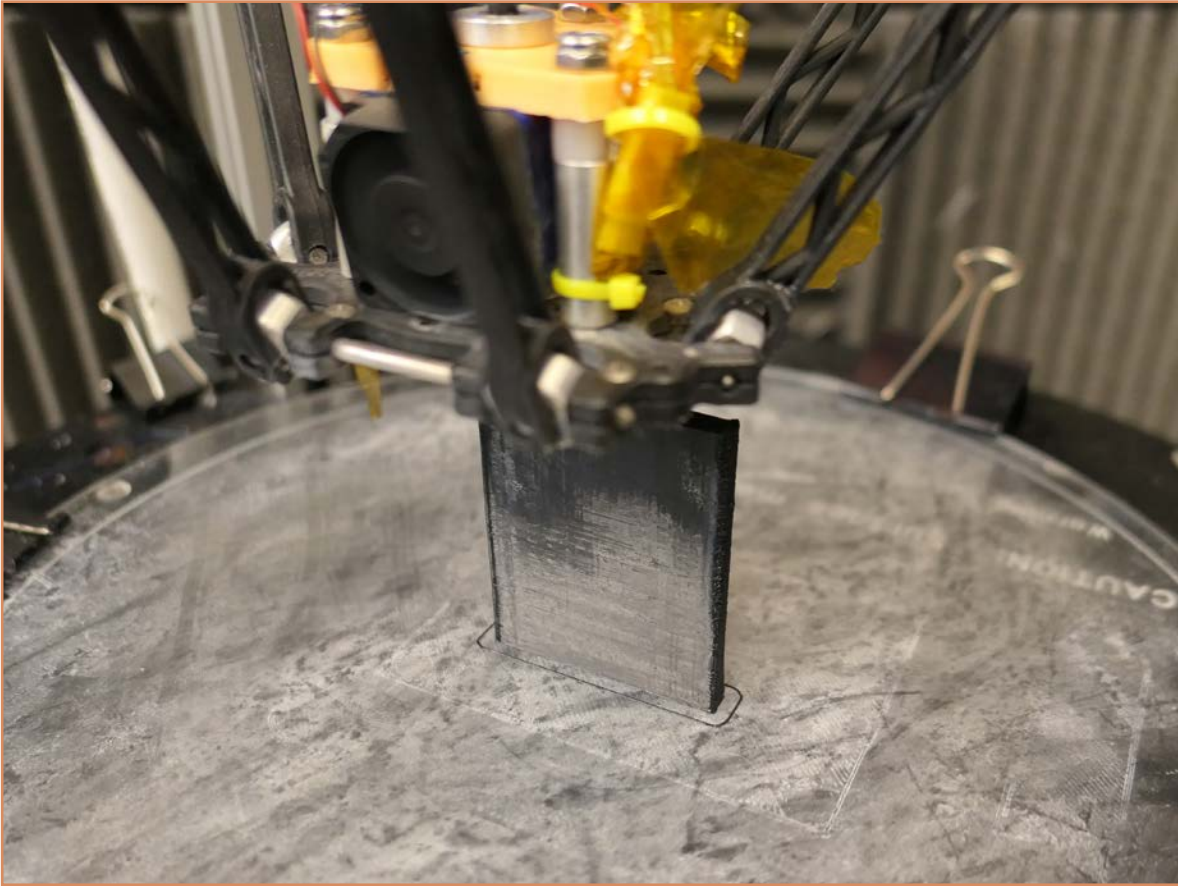
The fastest job gains are expected in health care, particularly ambulatory care, as well as leisure and hospitality, and construction. Natural resources and agriculture are expected to add significant employment due to the region's fruit orchards and vineyards. (See Charts 1 & 4 in Appendix)



CENTRAL EMPLOYMENT PROJECTIONS

The most recent projection cycle shows the Central Sub-region adding over 14,000 jobs to the tri-county area between 2014 and 2024, a growth of 16%. The Central region is projected to grow significantly faster than the state (+14%) and was projected to be the fastest growing region of the state.

The private sector is expected to dominate job growth in the long-term adding around 94% of the 13,160 payroll jobs projected to be added by 2024. In fact, every private industry sector is expected to add jobs through 2024. Job gains are expected to be concentrated in four industries. Health care (+2,250) is expected to add more jobs than any other industry, which is highly influenced by the aging population. Leisure and hospitality, which is largely tourism based jobs, is expected to add 2,240 jobs (+19%) by 2024. Professional and business services is forecast to add 1,730 jobs. Finally, construction is expected to add 1,500 jobs and be the region's fastest-growing private industry expanding by 32%. Despite being the fastest-growing industry, employment levels in construction are expected to remain considerably below levels from the 2006 housing boom. (See Charts 2 & 5 in Appendix)



JELD-WEN Door Replacement Systems, Inc. has the largest format, production, delta 3d FDM printer in the US. Pictured – 3d print in process.

SOUTH EMPLOYMENT PROJECTIONS

The most recent projection cycle shows Klamath and Lake Counties are expected to add 1,750 jobs, a growth of 7% between 2014 and 2024. The South Sub-region is expected to reach 2007 peak employment levels by 2024, a 17-year “recovery.” The private sector is projected to grow at a slightly faster pace (+8%) than the economy as a whole due to very few job gains in the public sector.

Four industries account for over 70% of the projected job growth in the South Sub-region. Health care and social assistance is projected to add the most jobs (+490), which is highly influenced by the aging population. Leisure and hospitality, primarily tourism related, is also expected to add a significant number of jobs (+350). The fastest growing industry is expected to be construction, expanding by 32% (+250 jobs). Despite this fast growth, industry employment will remain significantly below levels seen during the housing boom in 2006. Finally, notable gains are also projected in natural resources and mining (+160 jobs). A handful of industries are expected to decline in the long-term. These include information and financial activities, as well as, general merchandise stores. The decline in general merchandise stores includes the recent closure of the two Haggen Grocery Stores in Klamath Falls. The industry is not expected to experience any further declines after accounting for these layoffs. (See Chart 3 & 6 in Appendix)

APPENDIX

Chart 1

Industry Employment Forecast, 2017-2027				
North				
Source: Oregon Employment Department				
	2017	2027	Change	% Change
Total Employment	31,060	34,400	3,340	10.8%
<u>Total payroll employment</u>	28,210	31,150	2,940	10.4%
Total private	24,090	26,850	2,760	11.5%
Natural resources and mining	4,520	4,790	270	6.0%
Construction	870	1,030	160	18.4%
Manufacturing	2,500	2,800	300	12.0%
Durable goods	1,130	1,230	100	8.8%
Nondurable goods	1,370	1,580	210	15.3%
Wholesale trade	640	710	70	10.9%
Retail trade	3,340	3,590	250	7.5%
Transportation, warehousing, and utilities	580	650	70	12.1%
Information	340	350	10	2.9%
Financial activities	520	540	20	3.8%
Professional and business services	1,820	2,120	300	16.5%
Health care and social assistance	3,890	4,530	640	16.5%
Leisure and hospitality	3,890	4,410	520	13.4%
Other services and private households	1,000	1,120	120	12.0%
Government	4,120	4,300	180	4.4%
<u>Self-employment</u>	2,850	3,250	400	14.0%

Chart 2

Industry Employment Forecast, 2017-2027				
Central				
Source: Oregon Employment Department				
	2017	2027	Change	% Change
Total Employment	101,280	116,240	14,960	14.8%
<u>Total payroll employment</u>	94,520	108,190	13,670	14.5%
Total private	81,780	95,010	13,230	16.2%
Natural resources and mining	1,440	1,630	190	13.2%
Construction	6,670	9,020	2,350	35.2%
Manufacturing	7,090	8,040	950	13.4%
Durable goods	4,970	5,400	430	8.7%
Nondurable goods	2,120	2,640	520	24.5%
Wholesale trade	2,830	3,140	310	11.0%
Retail trade	12,600	14,020	1,420	11.3%
Transportation, warehousing, and utilities	2,380	2,700	320	13.4%
Information	1,770	2,100	330	18.6%
Financial activities	4,690	5,240	550	11.7%
Professional and business services	10,330	12,150	1,820	17.6%
Health care and social assistance	13,630	16,170	2,540	18.6%
Leisure and hospitality	13,730	15,580	1,850	13.5%
Other services and private households	3,690	4,130	440	11.9%
Government	12,740	13,180	440	3.5%
<u>Self-employment</u>	6,760	8,050	1,290	19.1%

Chart 3

Industry Employment Forecast, 2017-2027				
South				
Source: Oregon Employment Department				
	2017	2027	Change	% Change
Total Employment	28,240	30,000	1,760	6.2%
<u>Total payroll employment</u>	26,730	28,330	1,600	6.0%
Total private	20,570	22,070	1,500	7.3%
Natural resources and mining	1,450	1,650	200	13.8%
Construction	960	1,150	190	19.8%
Manufacturing	2,070	2,090	20	1.0%
Durable goods	1,860	1,870	10	0.5%
Nondurable goods	220	220	0	0.0%
Wholesale trade	830	900	70	8.4%
Retail trade	3,090	3,250	160	5.2%
Transportation, warehousing, and utilities	840	920	80	9.5%
Information	170	150	-20	-11.8%
Financial activities	920	960	40	4.3%
Professional and business services	2,350	2,430	80	3.4%
Health care and social assistance	3,890	4,340	450	11.6%
Leisure and hospitality	2,730	2,890	160	5.9%
Other services and private households	1,080	1,150	70	6.5%
Government	6,160	6,260	100	1.6%
<u>Self-employment</u>	1,510	1,670	160	10.6%

Chart 4

North					
Source: Oregon Employment Department					
Fastest Growing Occupations (with greater than 20 jobs)	2017 Employment	Employment Change	Percent Change	Median Hourly Wage	
Demonstrators and Product Promoters	74	24	32.4%	\$15.22	
Market Research Analysts and Marketing Specialists	62	20	32.3%	\$27.14	
Cost Estimators	28	9	32.1%	\$35.59	
Veterinarians	37	11	29.7%	ND	
Personal Care Aides	442	127	28.7%	\$12.45	
Separating, Filtering, Clarifying, Precipitating, and Still Machine Setters, Operators, and Tenders	31	8	25.8%	\$18.86	
Welders, Cutters, Solderers, and Brazers	47	12	25.5%	\$19.79	
Mechanical Engineers	53	13	24.5%	\$45.74	
Carpenters	195	46	23.6%	\$25.02	
Veterinary Technologists and Technicians	22	5	22.7%	ND	
Sales Managers	36	8	22.2%	\$46.51	
Medical Assistants	242	52	21.5%	\$17.66	
Cooks, Short Order	38	8	21.1%	\$11.93	
Software Developers, Applications	48	10	20.8%	\$48.72	
Combined Food Preparation and Serving Workers, Including Fast Food	504	105	20.8%	\$11.60	
Occupations with the most openings	2017 Employment	Employment Change	Total Openings	Median Hourly Wage	
Farmworkers and Laborers for Crops, Nurseries, and Greenhouses	2,427	147	3,912	\$14.81	
Cashiers	982	56	1,929	\$11.77	
Retail Salespersons	897	81	1,419	\$13.48	
Waiters and Waitresses	559	62	1,168	\$11.81	
Combined Food Preparation and Serving Workers, Including Fast Food	504	105	1,113	\$11.60	
Personal Care Aides	442	127	834	\$12.45	
Packers and Packagers, Hand	423	45	711	\$15.73	
Cooks, Restaurant	380	64	635	\$13.21	
Personal Care and Service Workers, All Other	336	68	603	ND	
Maids and Housekeeping Cleaners	383	50	580	\$11.82	
Office Clerks, General	455	15	550	\$15.65	
Food Preparation Workers	275	44	538	\$12.30	
Landscaping and Groundskeeping Workers	375	54	529	\$14.10	
Truck Drivers, Heavy and Tractor-Trailer	420	57	529	\$18.90	
Laborers and Freight, Stock, and Material Movers, Hand	314	46	501	\$13.98	

Chart 5

Central					
Source: Oregon Employment Department					
Fastest Growing Occupations (with greater than 20 jobs)	2017 Employment	Employment Change	Percent Change	Median Hourly Wage	
Photographers	32	25	78.1%	\$15.11	
Computer Network Architects	101	58	57.4%	\$44.22	
Cartographers and Photogrammetrists	30	15	50.0%	ND	
Cement Masons and Concrete Finishers	364	156	42.9%	\$18.65	
Software Developers, Applications	206	84	40.8%	\$37.63	
Chemical Engineers	48	19	39.6%	ND	
Market Research Analysts and Marketing Specialists	302	119	39.4%	\$23.42	
Physician Assistants	105	41	39.1%	\$54.57	
Aircraft Mechanics and Service Technicians	61	23	37.7%	\$25.43	
Carpenters	1,872	690	36.9%	\$19.50	
Meeting, Convention, and Event Planners	30	11	36.7%	\$25.88	
Chemists	123	45	36.6%	\$31.64	
Health Specialties Teachers, Postsecondary	33	12	36.4%	ND	
Physical Therapists	311	112	36.0%	\$36.69	
Cost Estimators	213	76	35.7%	\$29.22	
Occupations with the most openings	2017 Employment	Employment Change	Total Openings	Median Hourly Wage	
Retail Salespersons	4,232	513	6,917	\$12.63	
Waiters and Waitresses	2,419	318	5,150	\$11.81	
Cashiers	2,230	66	4,265	\$11.97	
Combined Food Preparation and Serving Workers, Including Fast Food	1,917	412	4,258	\$11.50	
Carpenters	1,872	690	2,684	\$19.50	
Cooks, Restaurant	1,556	273	2,619	\$14.04	
Customer Service Representatives	1,783	188	2,556	\$16.14	
Office Clerks, General	1,954	141	2,487	\$15.51	
Maids and Housekeeping Cleaners	1,557	245	2,428	\$12.10	
Landscaping and Groundskeeping Workers	1,393	267	2,070	\$14.60	
General and Operations Managers	1,967	337	2,054	\$35.12	
Personal Care Aides	1,069	324	2,046	\$11.89	
Bookkeeping, Accounting, and Auditing Clerks	1,570	128	1,925	\$18.54	
Counter Attendants, Cafeteria, Food Concession, and Coffee Shop	818	78	1,917	\$11.69	
Personal Care and Service Workers, All Other	1,001	149	1,704	\$14.55	

Chart 6

South					
Source: Oregon Employment Department					
Fastest Growing Occupations (with greater than 20 jobs)	2017 Employment	Employment Change	Percent Change	Median Hourly Wage	
Nurse Practitioners	23	9	39.1%	\$52.38	
Bus Drivers, Transit and Intercity	24	7	29.2%	\$14.18	
Cement Masons and Concrete Finishers	28	7	25.0%	ND	
Wholesale and Manufacturing Sales Representatives, Except Technical and Scientific Products	161	36	22.4%	ND	
Painters, Construction and Maintenance	108	24	22.2%	\$16.51	
Plumbers, Pipefitters, and Steamfitters	112	23	20.5%	\$25.11	
Sales Representatives, Services, All Other	30	6	20.0%	ND	
Medical Assistants	125	24	19.2%	\$15.92	
Personal Care Aides	251	46	18.3%	\$12.09	
Bakers	28	5	17.9%	\$13.58	
Financial Managers	45	8	17.8%	\$34.38	
Supervisors and Managers of Construction Trades and Extraction Workers	85	15	17.7%	\$28.65	
Medical and Health Services Managers	75	13	17.3%	\$48.52	
Health Technologists and Technicians, All Other	35	6	17.1%	ND	
Woodworkers, All Other	76	13	17.1%	\$16.93	
Occupations with the most openings	2017 Employment	Employment Change	Total Openings	Median Hourly Wage	
Retail Salespersons	1,006	88	1,586	\$12.18	
Cashiers	761	4	1,419	\$11.70	
Combined Food Preparation and Serving Workers, Including Fast Food	442	64	923	\$11.64	
Waiters and Waitresses	462	28	920	\$11.70	
Farmworkers and Laborers for Crops, Nurseries, and Greenhouses	497	66	864	\$11.78	
Customer Service Representatives	610	-37	709	ND	
Maids and Housekeeping Cleaners	462	24	640	\$11.59	
Janitors and Cleaners, Except Maids and Housekeeping Cleaners	423	17	569	\$12.63	
Office Clerks, General	494	-19	542	\$16.08	
Personal Care Aides	251	46	430	\$12.09	
Education, Training, and Library Workers, All Other	421	30	416	\$11.76	
Cooks, Restaurant	268	25	413	\$11.77	
Supervisors and Managers of Retail Sales Workers	331	36	400	\$18.12	
Medical Secretaries	287	46	375	\$17.19	
Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	403	-38	370	\$16.69	



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