

Pumping 2 Billion Gallons With a Smile

Jason Payton,
Research Analyst,
Jason.M.Payton@state.or.us,
(503) 947-1239
Dwayne Stevenson,
Occupational Analyst,
Dwayne.Stevenson@state.or.us,
(503) 947-1261

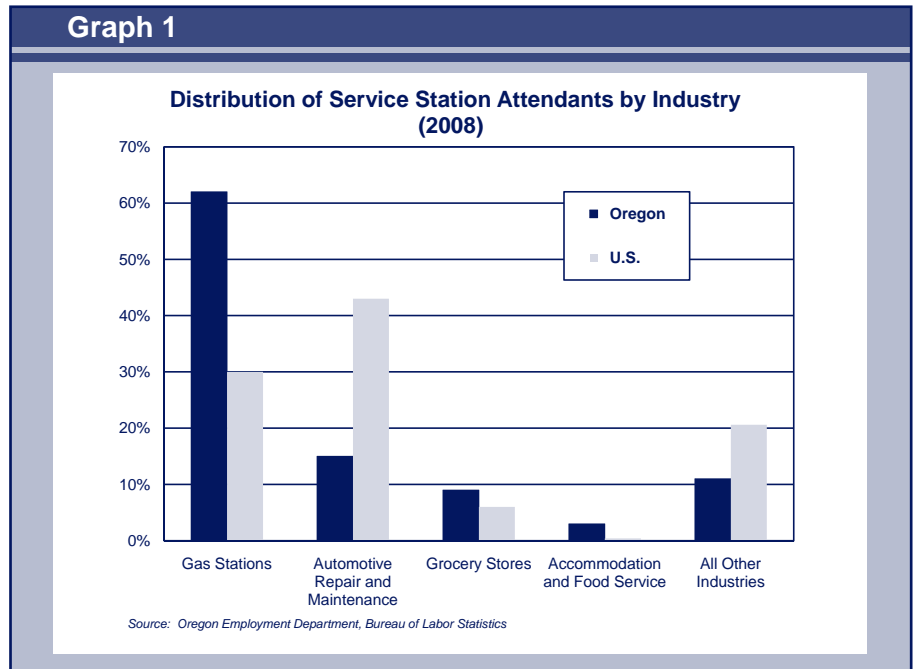
Oregon service station attendants pump fuel, change oil, and are the face of a multi-billion dollar industry.

Has the odometer on your car ticked over the point where you need to change the oil? Are you going to fill up the gas tank this week because of what you're hearing about gas prices? Either way, a service station attendant will make sure the basic maintenance on your vehicle is taken care of. Oregon has the highest concentration of service station attendants in the United States. State law prohibiting most customers from pumping their own gas has maintained the number of attendants employed by gas stations, and affected how gas stations developed over the decades.

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Graph 1



Would You Like Me to Check the Oil?

According to the U.S. Bureau of Labor Statistics (BLS) service station attendants service automobiles, buses, trucks, and other automotive, or marine vehicles with fuel, lubricants, and accessories. They collect payment for services, and cross sell other accessories like windshield wipers, or coolant checks. Attendants are employed by gas stations, auto lube shops, grocery stores, and many other retailers. They typically work outside in all kinds of weather conditions. Requiring minimum experience, working as an attendant is a good opportunity to create a work history, and develop customer service skills.

The Oregon Employment Department estimates there were just under 7,500 service station attendants employed in Oregon in 2008. More than 60 percent of those attendants worked for gas stations. The second largest employer of Oregon's service station attendants

were automotive repair and maintenance establishments (15%). Graph 1 shows a comparison of the U.S., and Oregon distribution of service station attendants.

The sector employing the most service station attendants in the U.S. is the automotive repair sector, with 43 percent of these workers. Many are employed by automotive oil change and lubrication shops. The difference is directly attributable to the Oregon prohibition of consumers pumping their own gas.

Oregon employs service station attendants at a rate six times higher than the national average. If the 1,140 service station attendants working in automotive repair and maintenance represented 43 percent of Oregon's service station attendants, Oregon would have about 2,700 service station attendants. That's nearly 5,000 fewer jobs than what was estimated in 2008.

From Tune Up to Twinkie

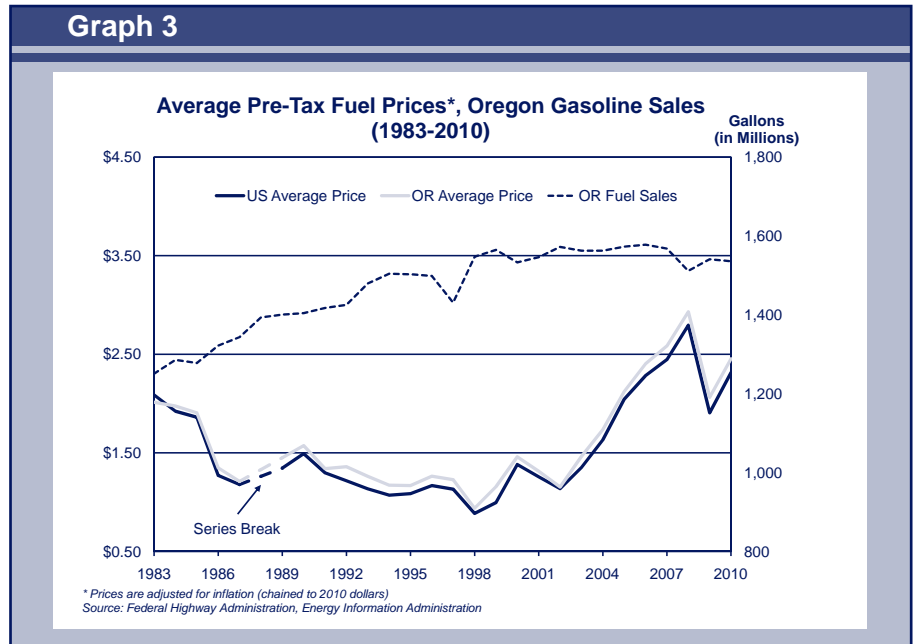
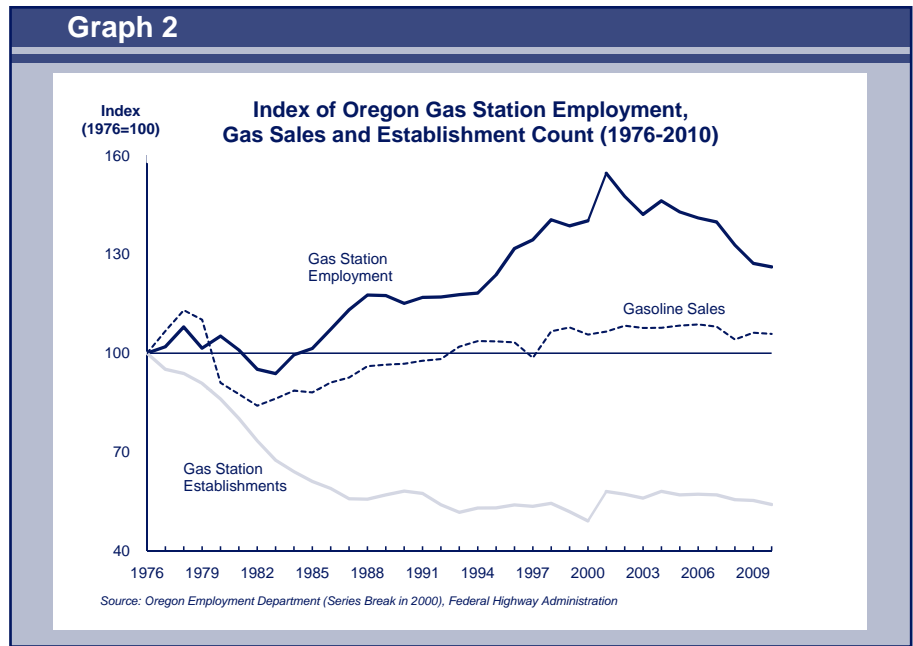
Most of the nation’s gas stations, almost 90 percent according to BLS estimates, had convenience stores in 2010. About 69 percent of Oregon gas station establishments had convenience stores. While the type of gas stations differs between Oregon and the U.S. today, that was not always the case.

Gas stations have changed since the 1950s. While many service stations provided automotive repair services, the combination of gas station and convenience store so common today was non-existent. In 1951, Oregon passed the law prohibiting most consumers from pumping their own gas, citing several reasons including fire safety. Many states shared concerns about consumers pumping their own gas, and by 1968 there were 22 other states prohibiting self-serve pumps.

Gas stations and fuel sales were also a smaller industry back then. Federal Highway Administration data shows U.S. fuel consumption in 1957 was only one-third of the level in 2009. According to the U.S. Department of Commerce, national gas station sales in 1957 hit 15 billion dollars. When adjusted for inflation, that works out to nearly 120 billion dollars in current dollars, about one-quarter of what gas station sales were in 2010.

Gas stations did not change much by 1970. But gas shortages in 1973 and 1979 would change the industry into what we see today. According to the U.S. Census Bureau, 93 percent of gas station sales in 1977 came from auto fuel sales, and only 16 percent of the nation’s gas stations sold groceries and food. The fuel crisis was a perfect environment to test ways to decrease the price of gas, including allowing of consumers to pump their own gas. By 1977, only New Jersey and Oregon outlawed most consumers from pumping their own gas.

Graph 2 shows indexed values of Oregon gas sales and industry data. Values greater than 100 indicate employment and gas sales have grown larger than those in 1976. Values less than 100, like the number of stations, are less than in 1976. The fuel sale



decline due to the 1979 gas crunch, and recession of the early eighties, would not recover until 1992. While gas station employment followed gas sales and economic activity upward, the number of gas stations fell dramatically in Oregon, a trend repeated across the country.

Consolidation of the nation’s refiners was a primary cause for gas station decline. Refiners like Exxon-Mobil, or Conoco-Phillips, distribute fuel to consumers directly through refinery-owned gas stations, through franchise

stations, or wholesalers who sell gas to independent stations. The number of fuel refiners has been halved since World War II, according to the American Petroleum Institute. With fewer refiners, fewer stations were needed to sell the same product.

Competition from other retailers also had a role to play in the decline of gas stations. Grocery stores, such as Safeway, and warehouse clubs and superstores, such as Costco, found selling cheap gas was a marketing tool to attract shoppers. In 1977, these

retailers accounted for less than 2 percent of gas sales in Oregon. By 2007 grocery stores, warehouse clubs and superstores accounted for 12 percent of Oregon auto-fuel sales.

A Premium for Service

So does gas cost more in Oregon if most consumers can't pump their own gas? Graph 3 compares the inflation adjusted pre-tax fuel prices of Oregon and the nation. According to the U.S. Energy Information Administration data, the average difference in Oregon and U.S. pre-tax prices was about \$0.09 between 1983 and 2010.

Attributing some, or all, of the price difference to the self-serve ban is harder. There are a number of reasons contributing to the price difference. Property values, population density, gas taxes, fuel source, and transportation costs are all factors contributing to the price Oregon drivers see at the pump. A 2000 research paper by Ronald Johnson and Scott Romeo examined the impact of self-serve prohibition on gas stations in Oregon and New Jersey. They found the ban on self-serve accounted for anywhere between \$0.03 to \$0.05 to the prices at the pump.

Fill it Up

If you're feeling nostalgic for the service stations of the past you could head to Bend. According to the *Bend Bulletin*, the attendants at the Stop and Go Shell Station clean your windshield, offer to check your oil, and still wear the classic white attendant uniforms. Most service station attendants today have replaced white uniforms for reflective vests. Gas stations have evolved over the decades. Most of the country's gas stations today have convenience stores. Oregon has fewer stations with convenience stores because the transition to self-serve pumps that led to the increase in convenience stores did not occur in Oregon. The prohibition of self-serve pumps in Oregon may be one of many factors contributing to higher than average fuel prices, and has also been the reason Oregon gas stations employ thousands more service station attendants than the national average. ■

LOCAL HIGHLIGHTS:

Portland Population: Two Decades of Growth



Amy S. Vander Vliet, Regional Economist,
Amy.S.Vandervliet@state.or.us, (503) 280-6031

Anyone who's called Portland home for years knows stories of population growth. Clogged freeways and neighbors who moved from out of state attest to the region's attractiveness. In truth, Portland grew faster than the state as a whole over the past two decades, but it didn't outpace the state by much. Between 1990 and 2010, the population of the five counties that make up the Oregon portion of the Portland metropolitan area grew 40 percent, adding 512,000 residents. The state population grew 35 percent over that time period.

Population Growth by County in the Portland Area

	1990	2010	Change	Percent Change
OREGON	2,842,321	3,831,074	988,753	35%
Washington County	311,554	529,710	218,156	70%
Multnomah County	583,887	735,334	151,447	26%
Clackamas County	278,850	375,992	97,142	35%
Yamhill County	65,551	99,193	33,642	51%
Columbia County	37,557	49,351	11,794	31%

Growth was faster in the first decade, between 1990 and 2000, when the Portland area's population grew 23 percent, and the state grew 20 percent. Between 2000 and 2010 the Portland area's growth slowed to 14 percent, and the state added 12 percent. The five counties of Portland made up 45 percent of the state's population in 1990, a share that grew to 47 percent by 2010.

Washington County grew fastest among the Portland five, at 70 percent. The county added 218,000 residents over the two decades, accounting for 43 percent of the region's growth. In 1990, 24 percent of the region's residents lived in Washington County, and by 2010 the county's share grew to 30 percent.

Yamhill County also grew quickly, adding 51 percent between 1990 and 2010. Yamhill is one of the smaller counties in the region, so that growth represented about 34,000 new residents, accounting for about 7 percent of the region's growth.

Multnomah and Clackamas counties added a lot of residents, though their percentage growth was slower than the statewide rate. Multnomah County added more than 150,000 residents, accounting for 30 percent of the region's population growth. Clackamas County population grew by 97,000 over the period, accounting for about 19 percent of the region's growth.

For more information on specific regions, visit www.QualityInfo.org, then choose an area on the map in the upper right-hand corner. ■

Destination Oregon – Leisure and Hospitality Industry Trends

*Shawna Sykes, Workforce Analyst,
Shawna.L.Sykes@state.or.us,
(503) 397-4995 x232*

Are you planning your next Oregon vacation? Looking forward to exploring the tidepools at the Oregon Coast or going skiing at Mt. Bachelor? Paddling the Columbia River in a kayak? Sampling Oregon wine in the Willamette Valley? Or spending an evening at a Broadway musical with friends? Opportunities to escape your normal routine and be entertained, pampered, and waited on abound. Oregon's leisure and hospitality industry is here, at your service.

The word leisure conjures up images of bathing beauties lounging poolside sipping a blended frozen drink while soaking up the sun's golden rays.

Oregon's leisure and hospitality industry includes businesses providing lodging, food services, arts, entertainment, and recreation.

Average employment in Oregon's leisure and hospitality industry was over 170,000 in 2010 and made up nearly 11 percent of the state's covered employment. Payroll for Oregon's leisure and hospitality industry in 2010 was nearly \$2.8 billion. Dean Runyan Associates – a research and planning firm specializing in the travel, tourism, and recreation industry – reported that in 2009, the gross domestic product of the travel industry was \$3.1 billion, making it one of the three largest export-oriented industries in rural Oregon counties along with agriculture/food processing and logging/wood products.

Oregonians and our visitors must love to eat since food services makes up the largest segment of leisure and hospitality in Oregon, with over 120,000 jobs and 70 percent of the industry's employment (Graph 1). The accommodations sector makes up 15 percent of Oregon's leisure employment with nearly 25,000 jobs.

Amusements, gambling, and recreation employs nearly 20,000 workers or 11 percent of the industry's employment. The smallest segments of leisure employment are performing arts and spectator sports with over 4,200 jobs and museums, historical sites, zoos, and parks with over 2,600 jobs statewide.

According to the U.S. Census Bureau, businesses with no employees also contribute significantly to Oregon's leisure and hospitality industry. In 2008, there were over 19,000 nonemployer establishments with over \$460 million in sales receipts in Oregon. The arts, entertainment, and recreation sector makes up 83 percent of nonemployer establishments in the leisure industry and has 63 percent of sales. Independent artists, writers, and performers

account for the largest share, generating 36 percent of sales receipts in Oregon's nonemployer leisure industry businesses. Accommodation and food service businesses are also important, making up 17 percent of nonemployer establishments and 37 percent of sales receipts.

Weathering the Storm?

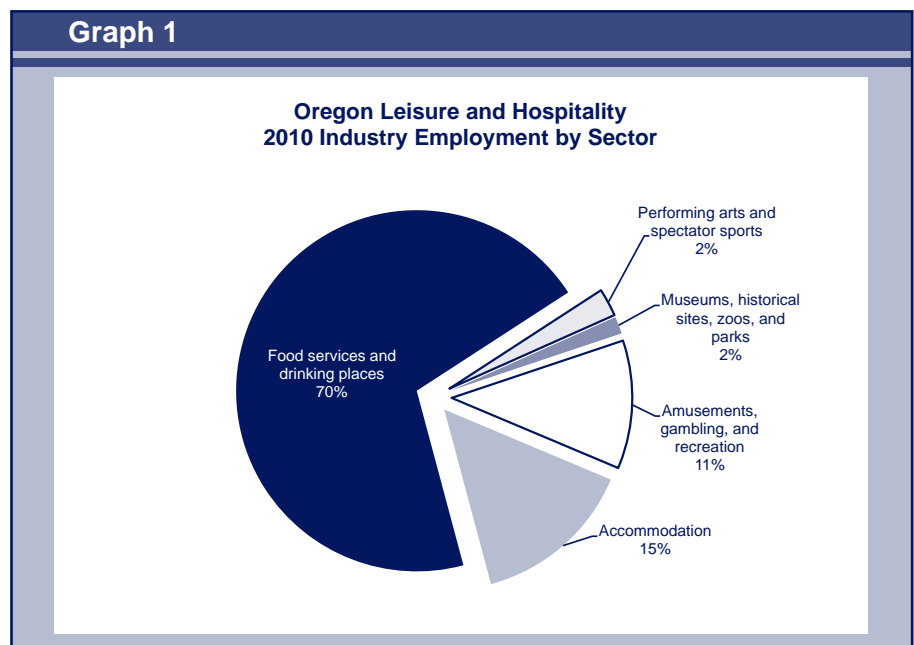
Leisure and hospitality employment in Oregon reached its peak in August 2008 with 181,700 people employed. From that peak to the most recent low in February 2010, leisure employment lost more than 28,000 jobs, a 16 percent decline in 18 months.

In 2010, Oregon average employment in leisure and hospitality was the lowest it has been in the past five years (Graph 2). However, the growth in seasonal jobs in 2010 was much greater than in 2009 when the seasonal drop from the August summer high employment to December's low employment was just under 13,000 jobs. Summer sales helped return confidence to business owners resulting in an employment increase of more than 17,000 jobs (+11%) from winter lows to the industry's August peak in 2010.

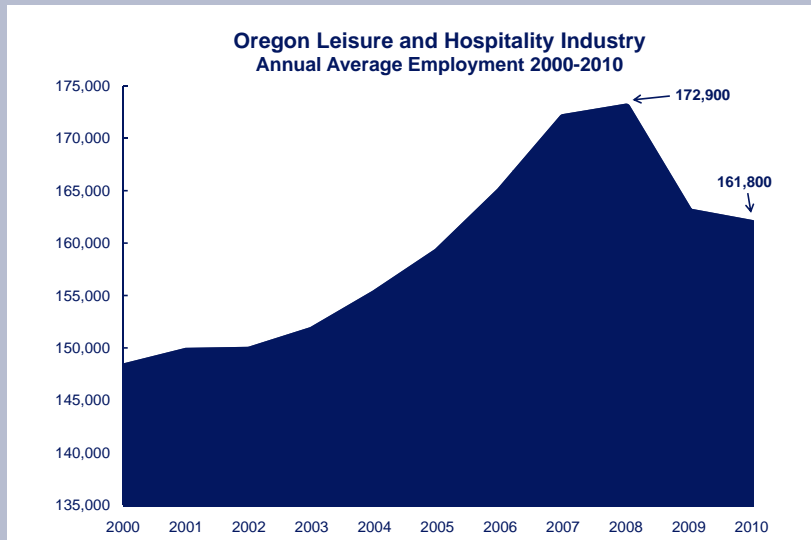
Tourism thrives in the summer months when visitors flock to Oregon's many resort areas, especially the coastal counties, campgrounds, and recreational areas. Charles Kingsbaker, Director of Sales and Marketing for Central Oregon's Black Butte Ranch, confirms that like many of Oregon's other tourism businesses, about 80 to 85 percent of the resort's business oc-

Payroll for Oregon's leisure and hospitality industry in 2010 was nearly \$2.8 billion.

Graph 1



Graph 2



ers and waitresses, cooks, counter attendants, and supervisors of food preparation and serving workers making up the top five. The average wage for this industry in 2010 was \$17,045, only 41 percent of the state's average wage across all industries of \$41,667.

According to the U.S. Bureau of Labor Statistics, nationwide many jobs in this industry provide only part-time employment with average weekly hours estimated between 25 and 26 for workers in leisure and hospitality in 2010 versus average weekly hours between 34 and 34.3 across all private-sector industries in 2010. This prevalence of part-time employment within the industry helps explain the lower-than-average annual wages of the industry as a whole.

curs between Memorial Day and Labor Day. The Oregon weather is more cooperative during summer, inviting more outdoor activity from residents and visitors.

According to the Oregon Employment Department's unemployment insurance claims information, for claims where industry information is available, the leisure and hospitality industry had the fourth highest average number of claims in 2010 with 7,681. Construction, manufacturing, and retail trade led unemployment insurance claims statewide last year.

Urban Areas Have More Leisure Jobs Than Rural

Metro area counties have the highest concentrations of employment in the leisure and hospitality sector due to population density and the amenities available to residents and visitors. Concert and entertainment venues, sports arenas, convention facilities, and other attractions are commonly located near the larger metropolitan areas so that event promoters can attract larger groups and tourist amenities

are available within short distances. Multnomah, Washington, Lane, Clackamas, and Marion counties had the largest number of leisure and hospitality industry jobs in Oregon according to 2010 preliminary employment information. Less populated Eastern Oregon areas (Wheeler, Gilliam, Sherman, Morrow, and Grant counties) had the fewest leisure jobs.

Food Service Jobs Most Common

The most common jobs in the leisure and hospitality industry are related to the food services sector, with food preparation and serving workers, wait-

The leisure and hospitality industry is a high-growth industry according to the Oregon Employment Department's employment projections. It's projected to grow by 12 percent from 2008 to 2018, adding 21,500 jobs, a faster rate of growth than Oregon's all-industry projection of 9 percent.

More Women Than Men

There are more women working in leisure and hospitality jobs than men in Oregon, according to the U.S. Census Bureau's Local Employment Dynamics program data. More than half of Oregon's leisure jobs (56%) are held by women.

Table 1

Top 10 Most Common Occupations in Leisure and Hospitality in Oregon

Job Title	2008 Average Employment	2010 Average Annual Wage
Combined Food Prep. & Serving Workers, Incl. Fast Food	30,317	\$20,082
Waiters & Waitresses	27,953	\$23,344
Cooks, Restaurant	14,005	\$23,785
Counter Attendants in Cafeterias, Food Conc. & Coffee Shops	8,506	\$20,542
Supervisors/Managers of Food Prep. & Serving Workers	7,655	\$32,771
Bartenders	7,194	\$23,194
Dishwashers	6,814	\$19,659
Maids & Housekeeping Cleaners	6,814	\$21,360
Cooks, Fast Food	6,099	\$19,871
Food Preparation Workers	4,516	\$22,080

Oregon's Leisure Industry is Young

Nearly three out of five workers in Oregon's leisure and hospitality industry are younger than age 34 according to the U.S. Census Bureau's Quarterly Workforce Indicators program (Graph 3). More than one-fourth of leisure workers are aged 25 to 34. Nearly one in five workers in the leisure and hospitality industry is age 21 or younger.

Only 12 percent of Oregon's leisure workers are age 55 or over. Physical demands of the work could explain the drop in employment as staff age along the continuum. Many service workers must be able to remain on their feet throughout their shifts, waiting on customers, bussing tables, doing food preparation or cooking, washing dishes, or cleaning hotel rooms.

Waiter, Can I Have Another?

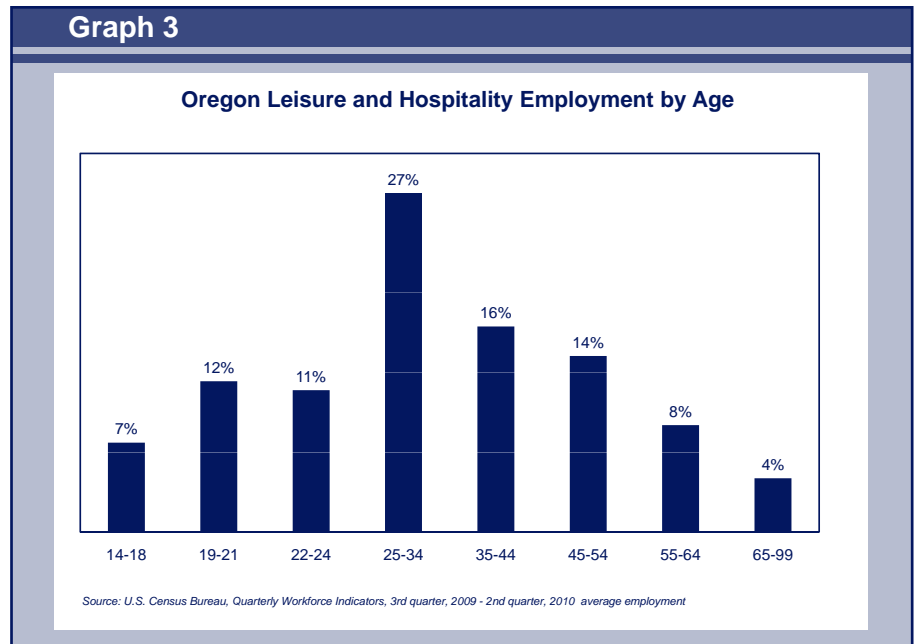
Food services makes up the largest segment of the leisure industry in Oregon. This includes both fine dining, fast food, caterers, food service contractors, mobile food services, bars and taverns. Average annual employment in this sector reached its peak in 2008 at 127,400 jobs and lost 7,400 jobs (-6%) in 2010. Food services employment is more stable than other leisure sectors with annual seasonal fluctuations from 5 to 10 percent in the past five years. Full service restaurants make up a large portion of employment in the food services sector with 49 percent while limited service restaurants (fast food and more) made up 42 percent of jobs.

Should I Stay or Should I Go?

The accommodations portion of leisure accounted for 15 percent of the industry's employment in 2010. It is the most volatile with annual seasonal fluctuations from 26 to 29 percent in the past five years. This sector hasn't seen average employment as low as 2010's since the late 1990s. Average annual employment fell from 22,300 in 2008 to 20,500 in 2010, a drop of 8 percent in the time period.

The year wasn't all doom and gloom, however. Astoria's luxury Cannery Pier Hotel had the best year ever in 2010,

Graph 3



according to owner Don West. "We had a 20 percent increase in business from Canada due to the exchange rate," said West, "but many of our guests come from the Portland Metro area, Eugene, Seattle, Vancouver, and as far away as South Africa." Some lodging facilities, in uncertain times, reduce guest services to cut costs. According to Don, this can put a business into a "death spiral" when guests leave unsatisfied, tell their friends and associates, and it results in a lower occupancy rate at the business. But the Cannery Pier Hotel's philosophy is to "Do more, and ask for less. You have to value that client even more in down times," says Don, and "keep them coming back."

Up the Creek With a Paddle

The arts, entertainment, and recreation segment of leisure includes performing arts and spectator sports, museums, historical sites, zoos and parks, amusements, gambling, and recreation (Graph 4). So many fun things to choose from!

Average employment in this sector, like others, peaked in 2008 at 23,200 statewide then dropped by 8 percent to 21,300 in 2010. So far in 2011, each month's employment has surpassed year-ago figures; a good sign. Employment within the arts, entertainment, and recreation sector fluctuates between 15 and 20 percent seasonally,

adding from 3,000 to 4,000 jobs from winter lows to summer peaks.

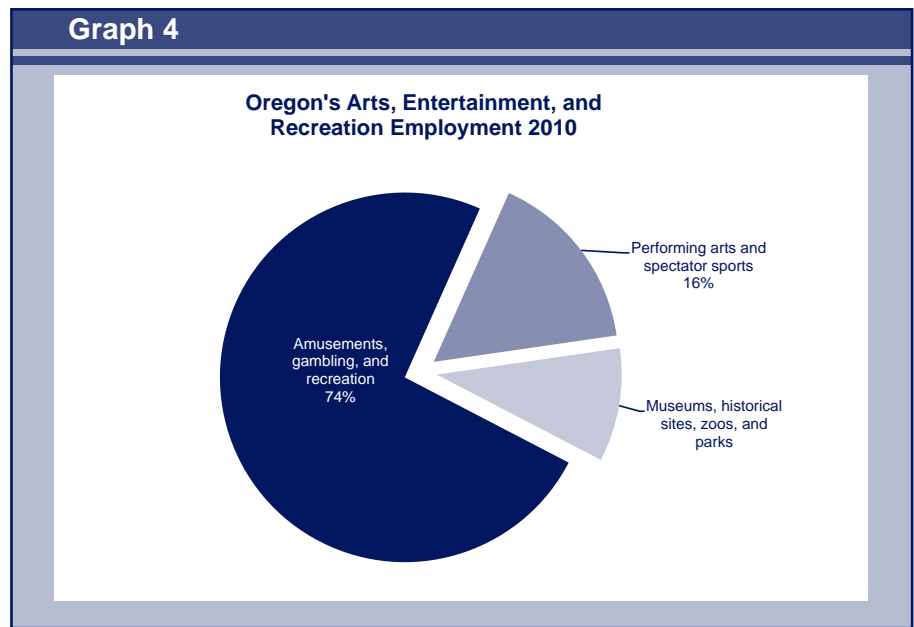
Three out of four (19,680 jobs) in this sector are in the amusements, gambling, and recreation industry which has the lowest average wage of \$16,983 annually. Performing arts and spectator sports has the highest average annual wage of the three components paying an average of \$50,219 in 2010.

Steve Gibons, owner and operator of Scappoose Bay Kayaking, indicated that business in 2010 was up over 2009. The company offers guided kayak tours, rentals, and sales of outdoor gear and supplies. Many of the kayaking business's customers are relatively local, from within a 100 to 150 mile radius of Scappoose Bay, or they are visitors of locals. In the retail shop, sales started picking up in late 2010 but the mix of products purchased has changed during this downturn. Customers are looking at more affordable kayaks, instead of the higher quality lines. The season really hasn't begun yet for 2011, with an extremely rainy spring, but Gibons is optimistic that this summer will be even better than last.

Let's Mosey Along

As we wrap up to hit the trail, it's essential to emphasize that Oregon's leisure and hospitality industry doesn't

just feed, lodge, and keep us and our visitors entertained, it's a stimulus for economic development in Oregon as well. Cruise ships that bring visitors to Astoria en route to Alaska, conferences that draw industry leaders from the entire West Coast to Sun River in Bend, Crater Lake National Park and Lewis and Clark Trail historic sites, Portland Timbers games, the Shakespeare Festival, and the Oregon Symphony all bring visitors to Oregon. Those who appreciate our natural beauty may decide to move their family or business to the area, increasing the diversity, and potentially the economic base of the state. And if not, those locals and visitors who partake in leisure activities in Oregon will still find the industry proprietors ready to assist; at their service. ■

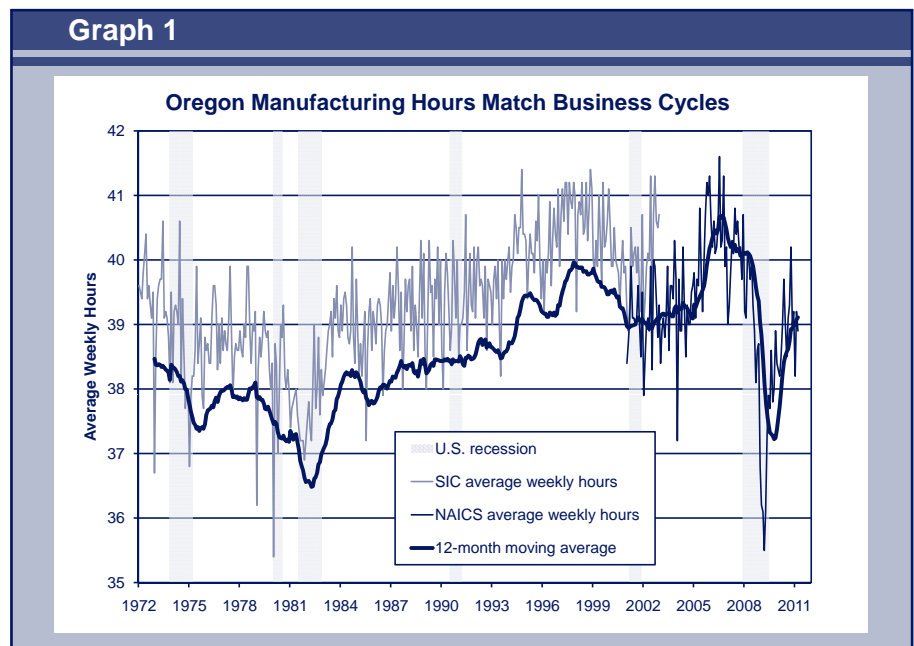


Average Manufacturing Workweek as an Economic Indicator

David Cooke, *Economist*,
 David.C.Cooke@state.or.us,
 (503) 947-1272

The manufacturing workweek is affected by broader economic cycles. Heading into most economic downturns, manufacturing production workers average fewer hours per week. Subsequently, throughout much of the ensuing recession, their workweek is reduced further. The accompanying chart shows this pattern unfolding during five of the past six recessions, dating back to 1972 when the data first became available for Oregon.

The gyrating lines in Graph 1 represent average weekly hours for Oregon manufacturing production workers. Data for 1972 through 2002 are for manufacturing firms as defined by the old Standard Industrial Classification (SIC) system. Data for 2001 through 2011 are for manufacturing firms as defined by the North American Industry Classification System (NAICS). Data are available for both industry systems for a 24-month



period during 2001 through 2002, where the SIC data averages 0.9 hour higher than the NAICS data. The bold line on the graph is the 12-month moving average that adjusts the SIC data down by 0.9 hours per month.

Recent data over the past year reflect the general expansion of the economy

and Oregon's manufacturing sector. The rapid rise in the workweek during that time is similar in magnitude to the gains seen following the recession that ended in 1982 and seen during the rapid economic expansion during the mid 2000s. ■

GREEN JOBS:

New Survey Counts Jobs in Natural Resources

*Charlie Johnson,
Senior Economic Analyst,
Charlie.B.Johnson@state.or.us,
(503) 947-1268*

*Gail Krumenauer,
Green Jobs Economist,
Gail.K.Krumenauer@state.or.us,
(503) 947-3098*

The Oregon Employment Department and the U.S. Department of Agriculture National Agricultural Statistics Service, Oregon Field Office recently completed a survey of the state's natural resources industries employers. The natural resources industries include crop production; animal production; forestry and logging; fishing, hunting, and trapping; and agriculture and forestry support activities.

A Large and Seasonal Workforce

Based on the survey results, we estimate that in 2009 there were 122,730 jobs throughout the state's natural resources industries. Nearly two-thirds of the jobs were in the crop production sector, which dominates both year-round and seasonal employment trends (Table 1). Seasonal jobs are employed for less than nine months in a year, while year-round jobs are employed for nine months or longer.

We estimate that in 2009 there were 37,167 year-round jobs and 85,563 seasonal jobs employed throughout the state's natural resources industries. Fishing, hunting and trapping accounted for the least year-round or seasonal jobs of the sectors surveyed. The animal production and forestry and logging sectors also had relatively small sea-

sonal job counts compared with the crop production and agriculture and forestry support activities sectors.

Employers reported that roughly three out of every five jobs is classified in the farmworker occupation. There were 60,681 farmworkers working with crops, or nursery and greenhouse plants, and another 14,661 farmworkers working with farm, ranch, and aquacultural animals; 75,342 farmworkers in all (Table 2). Jobs in the closely related occupation of "all other" agricultural workers numbered 9,479. Employers reported jobs in more than 100 different occupations throughout the state, ranging from farmworkers

and firefighters, to veterinarians and sales managers, to historians and floral designers. However, 90 percent of all jobs were found in the 15 occupations that each had more than 1,000 jobs.

The proportion of year-round versus seasonal jobs in Oregon's natural resources industries varied drastically between different occupations. On the high end, seasonal jobs accounted for 93 percent of farm labor contractors; 87 percent of firefighters; 83 percent of tree trimmers and pruners; 82 percent of farmworkers and laborers working with crops, or nursery and greenhouse plants; and 80 percent of fishers and

Table 1

Distribution of Jobs by Sector and Seasonality

Sector	Year-Round		Seasonal	
	Count	Percent	Count	Percent
Crop production	20,377	55%	58,061	68%
Animal production	5,249	14%	4,145	5%
Forestry and logging	4,935	13%	1,401	2%
Fishing, hunting and trapping	365	1%	495	1%
Agriculture and forestry support activities	6,241	17%	21,461	25%
Total	37,167	100%	85,563	100%

Table 2

Year-Round and Seasonal Jobs for Occupations With 1,000 Total Jobs or More

Occupation Title	Year-Round		Seasonal	
	Jobs	Percent	Jobs	Percent
Farmworkers and Laborers, Crop, Nursery, and Greenhouse	10,899	18%	49,782	82%
Farmworkers, Farm, Ranch, and Aquacultural Animals	5,385	37%	9,276	63%
Agricultural Workers, All Other	2,223	23%	7,256	77%
Forest and Conservation Workers	1,147	22%	4,110	78%
Farmers, Ranchers, and Other Agricultural Managers	2,354	61%	1,486	39%
Agricultural Equipment Operators	1,362	49%	1,405	51%
First-Line Supervisors of Farming, Fishing, and Forestry Workers	1,371	55%	1,143	45%
Logging Equipment Operators	1,677	79%	451	21%
Firefighters	268	13%	1,785	87%
General and Operations Managers	1,714	93%	125	7%
Farm Labor Contractors	84	7%	1,173	93%
Tree Trimmers and Pruners	200	17%	999	83%
Graders and Sorters, Agricultural Products	255	23%	850	77%
Laborers and Freight, Stock, and Material Movers, Hand	586	53%	517	47%
Fishers and Related Fishing Workers	213	20%	834	80%
All Other Occupations	7,429	63%	4,371	37%
Total	37,167	30%	85,563	70%

fishing workers (Table 2). On the other end of the spectrum, only 7 percent of general and operations managers, and 21 percent of logging equipment operators, had seasonal jobs. Many of the smaller occupations also had lower concentrations of seasonal jobs; in occupations with fewer than 1,000 total jobs, only 37 percent of jobs were seasonal.

Year-round jobs outnumbered seasonal jobs in 72 of the 102 occupations reported by employers. But overall, seasonal jobs outnumbered year-round jobs by more than two-to-one across all sectors within the agriculture, forestry, fishing, and hunting industries.

Three Out of 20 Jobs Reported as a Green Job

For this survey, employers were asked to identify “green jobs” as those workers whose essential job duties are directly related to one of the components of Oregon’s official definition of a green job.

We estimate that in 2009 there were 6,978 green year-round and 11,581 green seasonal jobs employed throughout Oregon’s agriculture, forestry, fishing and hunting sectors (Table 3). According to employers, 19 percent of all year-round jobs and 14 percent of all seasonal jobs were green jobs – jobs with essential duties related to Oregon’s definition of a green job.

The crop production sector had 12,748 green jobs in 2009, more than two-thirds of all the green jobs reported. The agriculture and forestry support activities sector employed roughly 15 percent of all green jobs, while the animal production and forestry and logging sectors employed 8 percent and 7 percent of the total, respectively. Oregon’s fishing, hunting, and trapping sector reported

fewer than 100 green jobs – less than 0.5 percent of the total.

In the crop production, animal production, and forestry and logging sectors one of every five year-round jobs has essential duties related to the definition of a green job. In the fishing, hunting, and trapping; and agriculture and forestry support activities sectors more than one year-round job in 10 was reported as a green job.

No Significant Difference Between Green Jobs and Other Jobs

In an attempt to learn more about the differences between green jobs and other jobs, employers were asked to identify the three key differences that set their workers with green jobs apart from the rest of their employees. Nearly 1,500 employers reported at least one green job, but only 14 percent of those employers acknowledged that green workers at their establishment had knowledge or skills that differed significantly from their co-workers.

Of the employers that reported at least one green job and reported some difference between workers with green jobs and other workers, 25 percent indicated that workers with green jobs had a personal interest in sustainability. Some employers also reported that

their green workers had significantly different technical skills or knowledge, work ethic or attitude, or education or formal training.

Employer Preferences for Special Licenses, Certificates, or Training

Employers in Oregon’s natural resources industries were asked a variety of questions about their workers and hiring practices. Table 4 shows the percent of employers in each sector responding affirmative to each question.

With the exception of animal producers, more than 20 percent of natural resources employers preferred or required special licenses, certificates, or training for their workers (Table 4).

Roughly 10 percent of Oregon’s agricultural employers reported that certification or training related to chemical pesticide application was preferred or required for some workers. Only four other categories had at least 100 employers (roughly 1% each) that preferred or required some workers to have special licenses, cer-

Table 3

Green Jobs by Natural Resources Sector

Sector	Green Year-Round	Green Seasonal
Crop production	4,048	8,700
Animal production	1,126	428
Forestry and logging	1,009	374
Fishing, hunting and trapping	48	32
Agriculture and forestry support activities	747	2,047
Total	6,978	11,581

Table 4

Percent of Employers Responding Affirmative, by Sector

Question	Crop Production	Animal Production	Forestry and Logging	Fishing, Hunting, and Trapping	Agriculture and Forestry Support Activities
Estimated number of employers	6,070	4,122	655	140	635
Special licenses, certificates, or training are preferred or required for some workers...	23%	5%	26%	26%	33%
Some workers use special tools and technologies...	25%	14%	9%	7%	16%
Some workers have green-related job activities...	36%	24%	36%	29%	33%
It is difficult to find workers with necessary knowledge and skills...	12%	8%	29%	33%	22%

tificates, or training: irrigation systems, certified sustainable production, health and safety, and CDL or valid driver's license. Only 20 employers indicated that they preferred or required some workers to have a certification or training in renewable energy, the least of any pre-identified category.

Employees Using Special Tools and Technologies

Roughly one out of every four employers in the crop production sector indicated that workers used special tools and technologies, much higher than any other sector.

Roughly 10 percent of Oregon's agricultural employers reported that some workers used irrigation scheduling and management tools in 2009. Some employers reported their workers used tools and technologies in four other categories: precision nutrient application systems (5%), soil moisture sensors (3%), solar panels (3%), and energy efficiency systems (2%).

Disconnect Between "Green Jobs" and "Green-Related Job Activities"

Employers were asked if any green-related job activities were performed by workers at their establishment, and roughly 68 percent responded "no." Employers in the crop production and forestry and logging sectors were slightly more likely to have some

green-related job activities at their establishment.

Erosion control was the most commonly cited activity: 14 percent of employers reported their workers performed job duties in the category. A fair number of employers reported their workers performed green-related job activities in six other categories: composting (10%), integrated pest management (10%), wildlife habitat enhancement (9%), sustainable agricultural production (8%), watershed management (8%), and manure management (7%).

While only 13 percent of natural resource employers reported having at least one green job in 2009, 32 percent reported having workers that performed green-related job activities during the period. The likely reason for the difference between these two estimates is a small but important difference in how the two questions were asked. On the first question, employers identified "green jobs" as those with essential job duties related to the definition of a green job, while the second question asked employers to identify any green-related job activities that were performed by their workers. So, while more than 18,500 jobs in Oregon's natural resources industries has essential duties related to the state's definition of a green job, it is likely that many more jobs have at least some green-related job activities.

10 Percent of Employers Have Trouble Finding Qualified Workers

Roughly 90 percent of employers responding to the survey indicated that they don't have difficulty finding employees with the skills needed at their business. Employer responses were classified into three categories: hard skills, soft skills, and other. Hard skills generally refer to skills and abilities that are trainable or measurable like "familiarity with tree species." Soft skills incorporate broader concepts and intrinsic or internal capabilities such as "can follow directions." The other category was created to account for things like "prior experience or items that referred to the physical ability to perform strenuous tasks." Of all the traits and skills employers say they need, hard skills accounted for 50 percent, soft skills for 35 percent, and other items for the remaining 15 percent.

More Data Will Be Available Online

We hope the data and insights provided here, and any additional research conducted based on these findings, will help answer many of the questions about the workforce needs of Oregon's natural resources industries employers. A full survey report, which includes more detailed data analysis, will be available online at www.QualityInfo.org/Green. ■

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Back to Baby Boomers: They Can't Work Forever

Nick Beleiciks,
State Employment Economist,
Nick.J.Beleiciks@state.or.us,
(503) 947-1267

Not too long ago, in a place not very far away, many employers were worrying about the coming wave of retirements among their older baby boomer workers. Retiring workers take years of knowledge and experience with them when they leave. Businesses and government agencies were grappling with the task of accommodating their older workers in order to keep them around longer, while trying to find enough replacement workers and bring them up to speed fast enough to ensure a smooth transition.

The recession changed all that. The worry of many employers switched from "How do I convince my key workers to stick around longer or find suitable replacements for them?" to "How do I make enough sales to keep from having to lay off my workers?"

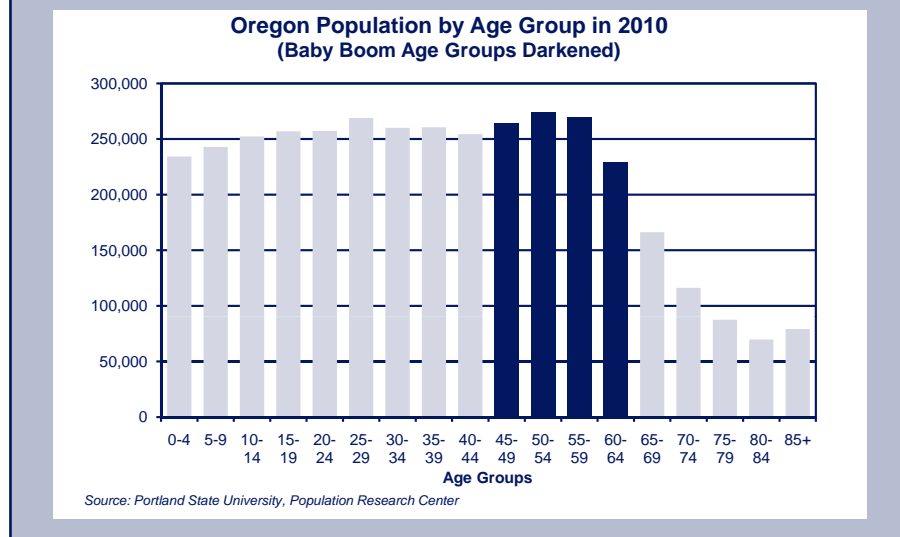
It's been three years since the recession began taking its toll on employment in Oregon and during that time the workforce continued to age. Now that the economy is growing and employers are starting to hire, it's time to start thinking again about the effects baby boom retirements will have on the labor force. After all, they can't work forever, can they?

A Boomer Turns 65

The baby boom generation consists of people who were born between 1946 and 1964. The generation is roughly represented by the dark bars in the population age groups in Graph 1. This year, the oldest members of the generation began turning 65 years old. The oldest working boomers will reach the full retirement age of 66 next year, the earliest age at which they can receive full retirement benefits from Social Security.

If they are like previous generations, most boomers will probably want to retire as soon as they are financially able to. This could shrink the overall labor force participation rate, which is the share of people currently working

Graph 1



or available and actively looking for work, unless the younger generations increase their participation rates.

Oregon's labor force participation rate is currently about 66 percent of the total population. Different age groups have different percentages of people participating in the labor force, and participation varies dramatically, and somewhat predictably, depending on age group. About 41 percent of Oregon teenagers are in the labor force, much lower than the overall rate because most should be busy with school and related activities and because teenagers are usually supported by their parents. Participation rates peak at over 84 percent among 25 to 44 year olds, who have usually finished their education and are working to support themselves and often a family.

The labor force participation rate of people between the ages of 55 and 64 falls quite a bit to 67 percent as the need to support children lessens and eligibility to collect retirement benefits kicks in. The participation rate falls to just 15 percent of those 65 and older as most workers in this group can retire and collect full Social Security benefits.

The aging of the labor force has already reduced the nation's participation rate by 0.5 percentage point since 2007, according to a recent report

The aging of the labor force has already reduced the nation's participation rate by 0.5 percentage point since 2007.

by the Congressional Budget Office. That estimate is based on aging alone and does not include the effects of the recession. The national labor force participation rate is expected to fall to 63 percent over the next decade.

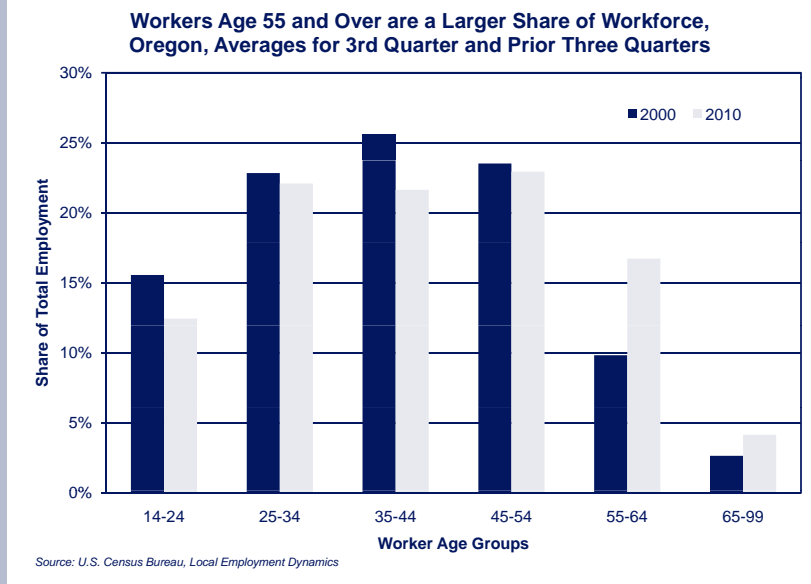
Every Fifth Worker in Oregon is Over 55

Workers reaching the full Social Security retirement age of 66 within the next 10 years are currently over age 55: these workers accounted for 21 percent of the workforce in 2010. One out of every five workers working in the private sector or at state and local government-owned employers is at least 55 years old.

Ten years ago, just 12 percent of workers were 55 and older and a lot more workers fell into the younger age groups. Graph 2 illustrates how the share of older workers shifted along with the boomers as they aged.

At the same time, the number of workers in the younger age groups dropped. Among the 35 to 44 age

Graph 2



group, who stand to inherit the workplace after the boomers retire, there are about 64,000 fewer workers than there were in 2000. If there are not enough workers to fill in behind the retiring boomers, employers may have difficulty finding workers.

Rural Areas Have Older Workforces

Rural counties’ workforces tend to have higher shares of older workers. In counties outside metropolitan areas, nearly one out of four (24%) workers has reached age 55. That represents nearly 67,000 workers in rural Oregon who are probably hoping to retire sometime this decade. The question is: will these areas have enough workers to replace them?

The extreme example is Wheeler County. With fewer than 300 payroll workers at private businesses or working for state and local governments in the county, about 93 are in the 55 and over age group. The next youngest age group of 45 to 54 year olds has 76 workers, and the 35 to 44 year old group has just 46. It may be a challenge to keep the same level of economic activity going in Wheeler County without attracting new workers to the area. Eleven other rural counties are facing similar situations and may not have enough younger workers to replace retiring boomers.

Although older workers are a smaller share of the workforce in more urban areas, there are a lot more of them. Multnomah County alone has more workers over the age of 55 than all of rural Oregon combined. No area of the state will avoid the effects of retiring boomers.

Health Care and Social Assistance May See the Most Retirements

The pace of the coming retirements will differ depending on the industry. Utilities and mining have a high concentration of older boomers, but they employ a relatively small number of workers. The industries that stand out in sheer size and share of workers 55 and over are health care and social assistance (both private and public) and educational services, (again, both private and public). Employers in these and in all other industries need to plan for how they are going to attract replacement workers, especially in occupations that require significant training.

Opportunities will be created for younger workers as employers promote to replace the retirees. It is likely that workers will be promoted more quickly than in the past and employers will have to work harder when hiring and training new workers.

Table 1

Rural Counties Have Higher Shares of Workers 55 and Over

Area	Number	Percent
Oregon	325,355	21%
Wheeler	93	34%
Lincoln	4,474	28%
Curry	1,739	28%
Wallowa	673	27%
Grant	539	27%
Gilliam	192	26%
Coos	5,136	26%
Lake	517	25%
Tillamook	1,936	25%
Clatsop	3,662	25%
Wasco	2,182	25%
Sherman	128	24%
Harney	517	24%
Morrow	871	24%
Jefferson	1,378	24%
Douglas	7,776	24%
Baker	1,271	24%
Crook	1,207	23%
Linn	8,900	23%
Josephine	5,022	23%
Klamath	4,924	23%
Benton	7,368	22%
Lane	29,674	22%
Marion	29,256	22%
Jackson	17,390	22%
Union	2,158	22%
Columbia	1,983	22%
Yamhill	6,216	22%
Malheur	3,198	21%
Polk	3,489	21%
Umatilla	6,005	21%
Hood River	2,417	21%
Clackamas	28,878	21%
Multnomah	82,584	20%
Deschutes	10,681	19%
Washington	40,924	18%

Average for 3rd Quarter 2010 and prior three quarters.

Source: U.S. Census Bureau, Local Employment Dynamics

Boomers Will Take Important Knowledge With Them

Employers that have one or two (or one or two hundred) key employees who are approaching retirement age should consider the skills that will walk out the door with that final punch of the time clock. While equivalent degrees and education can be hired through other workers by offering the right wage, specialized knowledge about a certain business, product, or service can only be gained with hands-on experience, and that experience leaves when an employee retires. Employers need to find replacements and instill

Table 2

**Utilities Has the Highest Share of Workers 55 and Over,
Health Care and Social Assistance Will Need the Most Replacement Workers**

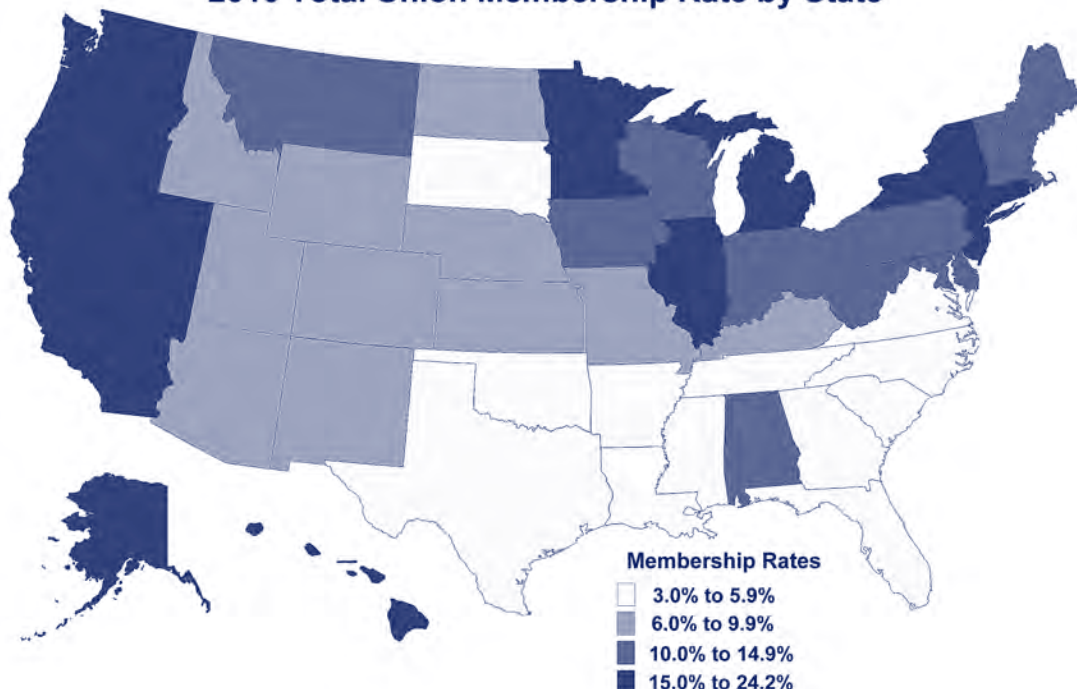
	Workers All Ages	Workers Ages 55 and Over	Percent of Ages 55 and Over
All Industries	1,558,544	325,355	21%
Utilities	7,542	2,167	29%
Mining	1,675	463	28%
Educational Services	143,175	39,482	28%
Real Estate and Rental and Leasing	25,902	6,887	27%
Public Administration	77,955	20,325	26%
Agriculture, Forestry, Fishing and Hunting	39,582	10,169	26%
Transportation and Warehousing	50,387	12,616	25%
Other Services (except Public Administration)	59,147	14,550	25%
Health Care and Social Assistance	221,726	52,255	24%
Wholesale Trade	72,999	15,245	21%
Manufacturing	162,891	33,917	21%
Professional, Scientific, and Technical Services	70,272	14,194	20%
Management of Companies	32,067	6,445	20%
Finance and Insurance	57,122	11,021	19%
Arts, Entertainment, and Recreation	25,983	4,783	18%
Administrative and Waste Services	80,850	14,634	18%
Construction	71,936	12,999	18%
Retail Trade	183,064	31,318	17%
Information	33,326	5,459	16%
Accommodation and Food Services	140,945	16,428	12%

Private and public average employment for 3rd Quarter 2010 and prior three quarters.

Source: U.S. Census Bureau, Local Employment Dynamics

them with company-specific know-how before the baby boomers decide it's time to retire en force. That is unless the baby boomers do end up working forever. ■

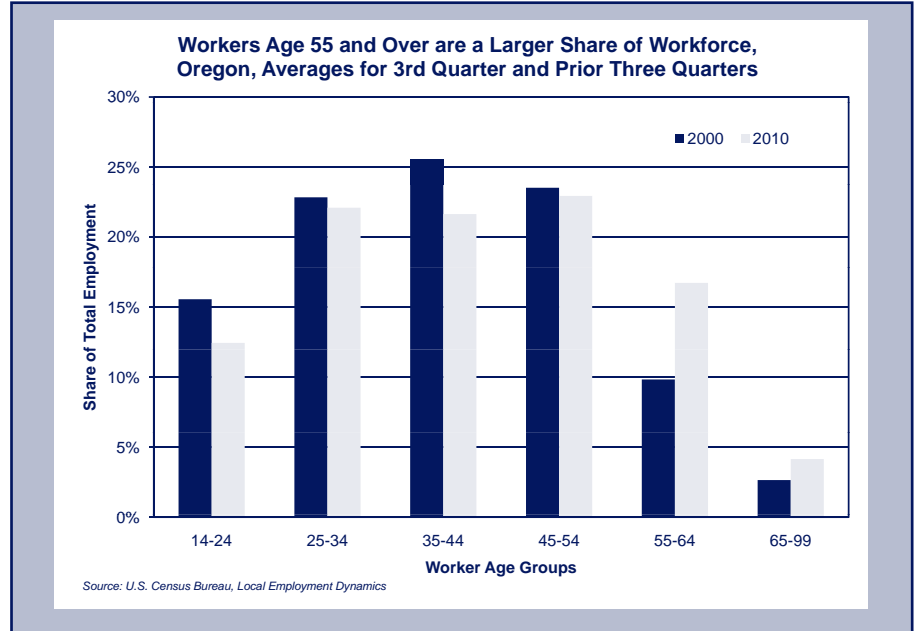
2010 Total Union Membership Rate by State



Unemployment Rates and Job Growth in Oregon's Metro Areas

Gail Kiles Krumenauer, *Economist*,
Gail.K.Krumenauer@state.or.us,
(503) 947-1274

- Corvallis was the only Oregon metro area with year-over-year job growth (1.8%) that kept pace with the state. Only two of the state's metro areas experienced job declines over the year: Salem (-0.6%) and Eugene (-0.5%).
- Unemployment rates in U.S. metros ranged from 4.1 percent to 24.6 percent in March. Corvallis ranked 58th lowest nationwide. Bend's unemployment rate was 18th highest among all 372 metro areas.
- Five of Oregon's six metros ranked in the top 100 nationally for unemployment rate declines from March 2010 to March 2011. The rate



dropped by 2.3 percentage points in Bend over the period, followed by Eugene and Portland (-2.1 per-

centage points each); Corvallis and Medford (-1.4 each); and Salem (-1.3). ■

Oregon's Unemployment Rate Falls Below 10 Percent

Oregon's seasonally adjusted unemployment rate dropped to 9.6 percent in April from the revised rate of 9.9 percent in March. Since a June 2009 high of 11.6 percent, Oregon's unemployment rate has trended downward. April marked Oregon's lowest unemployment rate in 28 months. Oregon's rate has not been lower since December 2008, when the rate was 9.2 percent. In April, 188,020 Oregonians were unemployed.

In April, Oregon's seasonally adjusted nonfarm payroll employment added 1,600, following a loss of 2,000 in March. On a seasonally adjusted basis, over the past two months, the private sector added 1,300 jobs, while government cut 1,700 jobs. Continuing the trend of the past year or so, a diverse group of major industries have been adding jobs. Since April 2010, only two of the major industries have declined, with financial activities and government each shedding slightly more than 1 percent. Leisure and

hospitality grew at the fastest pace of the major industries over the past 12 months, adding 5,200 jobs, or 3.3 percent.

Manufacturing added 700 jobs in April, when a loss of 500 is the normal seasonal movement. Semiconductor and electronic component manufacturing added 200 jobs in April and is up 1,300 since April 2010. At 26,900 in April, it is still well below the approximate 30,000 the industry employed throughout much of 2003 through 2007. Machinery manufacturing has rebounded off its low of 9,200 in January 2010. It has added 300 jobs so far this year and employed 10,300 in April. Similarly, fabricated metal product manufacturing expanded its employment from a low of 13,300 in January 2010, reaching 14,200 in April. In contrast, wood product manufacturing continues to edge lower, losing 100 jobs in April to tie its low for the year at 18,700.

Leisure and hospitality posted an impressive gain of 4,700 jobs in April, at a time of year when the addition of 1,600 is the normal seasonal movement. Arts, entertainment, and recreation leaped upward by 1,600 jobs in April, and is up 2,500 since April 2010. It reached its highest April level on record, at 24,200.

Professional and business services was revised downward by 800 jobs for March, then posted a decline of 500 jobs in April. Thus the payroll employment data paint a much less rosy view of this large sector's economic trend than in the last Oregon employment press release. The latest numbers indicate moderate expansion, at just over a 2 percent annual growth rate throughout much of the past year and a half. Within professional and business services the closely watched employment services industry had a disappointing month, shedding 900 jobs. The industry showed modest gains of 400 over the year. ■

	April 2011	March 2011	April 2010	Change From March 2011	Change From April 2010
Labor Force Status					
Civilian labor force	1,984,321	1,989,715	1,983,381	-5,394	940
Unemployed	188,020	207,212	218,663	-19,192	-30,643
Unemployment rate	9.5	10.4	11.0	-0.9	-1.5
Unemployment rate, seasonally adjusted	9.6	9.9	11.0	-0.3	-1.4
Employed	1,796,301	1,782,503	1,764,718	13,798	31,583
Nonfarm Payroll Employment					
Total nonfarm payroll employment	1,618,800	1,608,800	1,595,900	10,000	22,900
Total private	1,315,300	1,305,000	1,288,400	10,300	26,900
Mining and logging	6,600	6,500	6,400	100	200
Logging	5,100	5,000	4,900	100	200
Construction	66,700	64,000	65,000	2,700	1,700
Construction of buildings	14,900	14,100	15,500	800	-600
Heavy and civil engineering construction	8,100	7,500	8,400	600	-300
Specialty trade contractors	43,700	42,400	41,100	1,300	2,600
Manufacturing	165,600	164,900	160,900	700	4,700
Durable goods	116,700	116,400	114,000	300	2,700
Wood product manufacturing	18,700	18,800	20,100	-100	-1,400
Primary metal manufacturing	7,900	7,800	7,600	100	300
Fabricated metal product manufacturing	14,200	14,200	13,600	0	600
Machinery manufacturing	10,300	10,300	9,500	0	800
Computer and electronic product manufacturing	36,200	36,100	34,700	100	1,500
Semiconductor and electronic component mfg.	26,900	26,700	25,600	200	1,300
Transportation equipment manufacturing	10,500	10,300	10,200	200	300
Nondurable goods	48,900	48,500	46,900	400	2,000
Food manufacturing	25,300	24,800	22,200	500	3,100
Trade, transportation, and utilities	308,300	306,300	303,400	2,000	4,900
Wholesale trade	72,000	72,000	72,700	0	-700
Merchant wholesalers, durable goods	29,500	29,500	30,600	0	-1,100
Merchant wholesalers, nondurable goods	29,400	29,400	29,500	0	-100
Electronic markets and agents and brokers	13,100	13,100	12,600	0	500
Retail trade	184,700	182,100	179,000	2,600	5,700
Motor vehicle and parts dealers	22,400	21,800	21,400	600	1,000
Building material and garden supply stores	13,500	13,100	14,000	400	-500
Food and beverage stores	39,600	39,100	37,000	500	2,600
Clothing and clothing accessories stores	15,300	15,400	14,900	-100	400
Sporting goods, hobby, book and music stores	9,800	9,600	9,700	200	100
General merchandise stores	37,500	37,500	36,500	0	1,000
Miscellaneous store retailers	9,500	9,500	9,600	0	-100
Nonstore retailers	5,800	5,800	5,600	0	200
Transportation, warehousing, and utilities	51,600	52,200	51,700	-600	-100
Utilities	4,400	4,400	4,600	0	-200
Transportation and warehousing	47,200	47,800	47,100	-600	100
Information	32,500	32,600	31,800	-100	700
Publishing industries, except internet	14,200	14,200	14,100	0	100
Telecommunications	6,700	6,700	6,800	0	-100
Financial activities	92,100	92,400	92,700	-300	-600
Finance and insurance	56,400	56,300	55,500	100	900
Real estate and rental and leasing	35,700	36,100	37,200	-400	-1,500
Professional and business services	183,700	184,200	180,800	-500	2,900
Professional and technical services	74,400	74,100	71,600	300	2,800
Management of companies and enterprises	29,800	30,400	30,700	-600	-900
Administrative and waste services	79,500	79,700	78,500	-200	1,000
Administrative and support services	74,500	74,600	73,400	-100	1,100
Employment services	29,700	30,600	29,300	-900	400
Educational and health services	237,000	235,700	230,200	1,300	6,800
Educational services	34,500	34,300	34,300	200	200
Health care and social assistance	202,500	201,400	195,900	1,100	6,600
Ambulatory health care services	71,300	70,600	69,300	700	2,000
Hospitals	54,200	54,100	52,700	100	1,500
Nursing and residential care facilities	44,500	44,000	42,700	500	1,800
Social assistance	32,500	32,700	31,200	-200	1,300
Leisure and hospitality	165,200	160,500	160,000	4,700	5,200
Arts, entertainment, and recreation	24,200	22,600	21,700	1,600	2,500
Accommodation and food services	141,000	137,900	138,300	3,100	2,700
Accommodation	19,600	19,000	19,600	600	0
Food services and drinking places	121,400	118,900	118,700	2,500	2,700
Other services	57,600	57,900	57,200	-300	400
Government	303,500	303,800	307,500	-300	-4,000
Federal government	27,400	27,300	30,500	100	-3,100
State government	81,700	82,400	80,800	-700	900
State education	32,500	33,200	30,900	-700	1,600
Local government	194,400	194,100	196,200	300	-1,800
Local education	105,500	105,200	107,600	300	-2,100
Labor-management disputes	0	0	0	0	0

The most recent month is preliminary, the prior month is revised. Prepared in cooperation with the U.S. Department of Labor, Bureau of Labor Statistics.

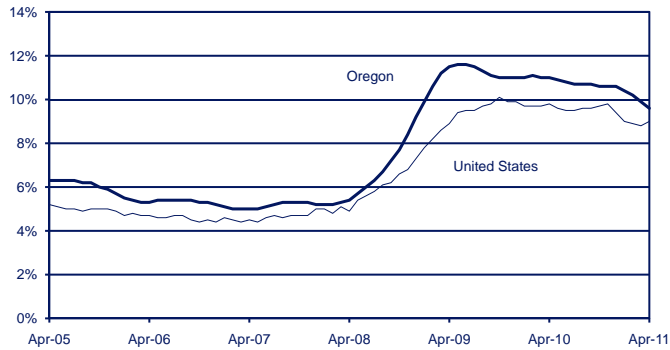
Labor Force Status: Civilian labor force includes employed and unemployed individuals 16 years and older by place of residence. Employed includes nonfarm payroll employment, self-employed, unpaid family workers, domestics, agriculture and labor disputants. Unemployment rate is calculated by dividing unemployed by civilian labor force.

Nonfarm Payroll Employment: Data are by place of work and cover full- and part-time employees who worked or received pay for the pay period that includes the 12th of the month. The data exclude the self-employed, volunteers, unpaid family workers, and domestics.

Cautionary Note to Users: Starting in December 2009, revised estimation procedures mandated by the U.S. Bureau of Labor Statistics may result in unusually large or volatile month-to-month employment changes. These survey-based estimates are revised annually, based on more complete information from quarterly employer tax records.

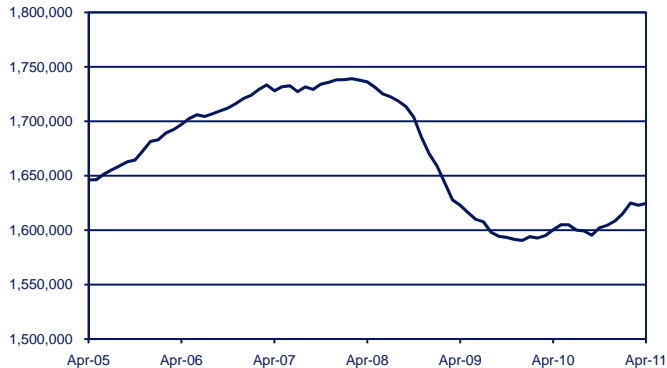
Unemployment Rates

Oregon Rate Drops While U.S. Rises Slightly in April
Unemployment Rates, Seasonally Adjusted



Total Nonfarm Payroll Employment

Job Growth Resumes with Modest Gains in April
Oregon Nonfarm Payroll Employment, Seasonally Adjusted



Indicators

Unemployment Rate (Seasonally adjusted)

	Oregon	U.S.
April 2011	9.6	9.0
Mar. 2011	9.9	8.8
April 2010	11.0	9.8

Seasonally Adjusted Employment (Total Nonfarm Payroll Jobs)

	Oregon	U.S.
April 2011	1,624,500	131,028,000
Mar. 2011	1,622,900	130,784,000
April 2010	1,600,200	129,715,000
Change From		
April 2010	24,300	1,313,000
% Change	1.5%	1.0%

Consumer Price Index (CPI)

(All urban consumers, 1982-84=100)

Port.-Sale, OR-WA	Index	Yearly Change
July-Dec. 2010	219.179	0.9%
Annual Average 2010	218.344	1.3%
United States		
April 2011	224.906	3.2%
Annual Average 2010	218.056	1.6%



OREGON LABOR TRENDS

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Laurie Warner, Director
Graham Slater, Administrator for Workforce & Economic Research
Production Team:

Gail Krumenauer Kathi Riddell Brenda Turner
Mark Miller Paul Marche Jessica Nelson

Address changes: Workforce & Economic Research
875 Union Street NE, Rm 207
Salem, OR 97311

or phone (503) 947-1204, 1-800-237-3710,
e-mail: Lmipubs.emp@state.or.us

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State of Oregon
EMPLOYMENT DEPARTMENT
875 Union Street NE
Salem, Oregon 97311