



# LOCAL LABOR TRENDS PACKET FEBRUARY 2014

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**February 2014**

**Economic Indicators  
 Unemployment Rates**

<b>Seasonally</b>		
<b>United States</b>	<b>Raw</b>	<b>Adjusted</b>
Dec. 2013	6.5%	6.7%
Nov. 2013	6.6%	7.0%
<b>Oregon</b>		
Dec. 2013	6.9%	7.0%
Nov. 2013	6.7%	7.3%
<b>Benton</b>		
Dec. 2013	5.0%	5.3%
Nov. 2013	4.7%	5.4%
<b>Linn</b>		
Dec. 2013	8.5%	8.7%
Nov. 2013	8.4%	9.1%

**Nonfarm Payroll Employment  
 (Preliminary Estimates)**

	<b>Employment</b>	<b>Annual Change</b>
<b>Benton</b>		
Total Employment	38,980	150
Manufacturing	2,960	-170
Trade, Trans., & Utl.	4,150	0
Private Ed. & Health	6,000	170
Government	14,090	100
<b>Linn</b>		
Total Employment	39,730	370
Manufacturing	6,850	120
Trade, Trans., & Utl.	8,860	0
Private Ed. & Health	5,080	20
Government	7,370	20

**Consumer Price Index (CPI)**

<b>United States</b>	233.0
Yearly % Change (Dec. 2013)	1.5%
<b>Portland/Salem OR-WA MSA</b>	229.8
Annual Average 2012	+2.3%

<http://www.bls.gov/cpi>

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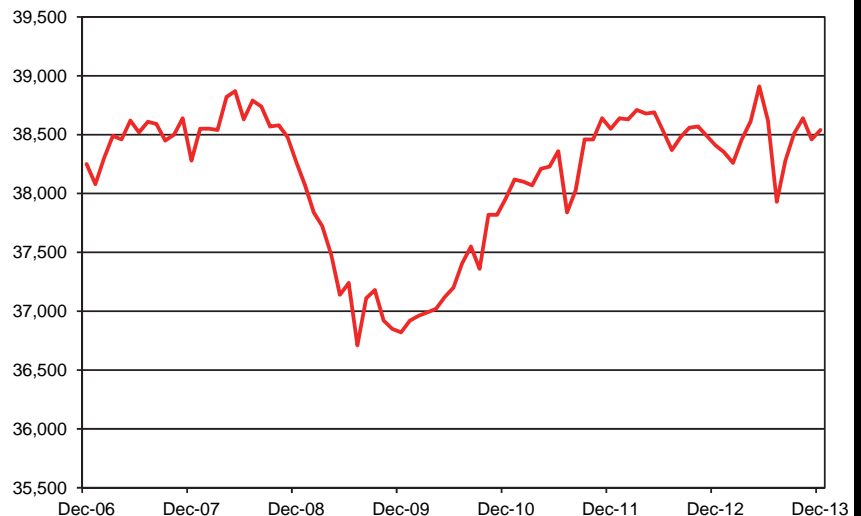
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*The seasonally adjusted unemployment rate for the U.S. in December was 6.7 percent, down from its revised November rate of 7.0 percent. The statewide unemployment rate decreased in December to 7.0 percent from its revised November rate of 7.3 percent.*

**Local News**

In December, Linn and Benton counties saw a decrease in their seasonally adjusted unemployment rate. Benton County's rate decreased to 5.3 percent in December, down from its revised November rate of 5.4 percent. Linn County's rate decreased from a revised rate of 9.1 percent in November to 8.7 percent in December. Benton County's December

**Benton County Total Nonfarm Employment  
 (Seasonally Adjusted) 2007-Present**

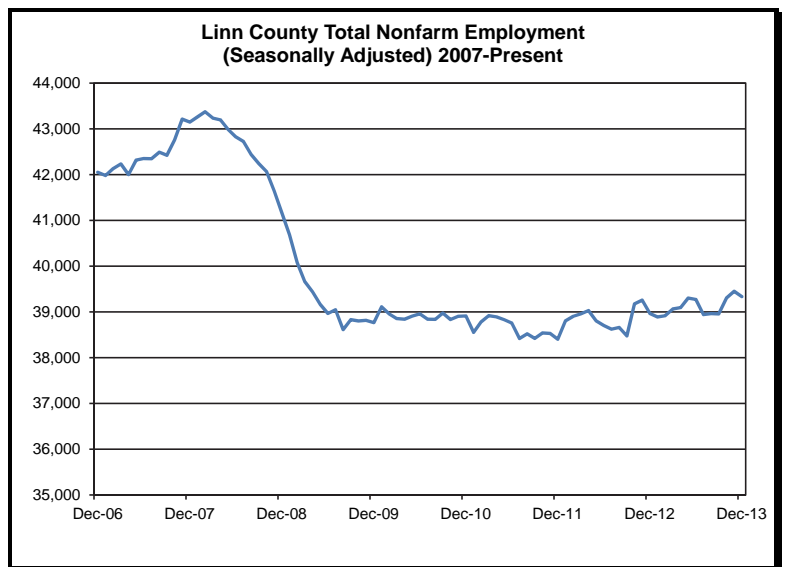


unemployment rate of 5.3 percent is slightly lower than its rate of 5.9 percent in December 2012. Linn County's December rate of 8.7 percent was lower than its rate of 10.6 percent in December 2012.

Linn and Benton counties combined had a seasonally adjusted unemployment rate of 7.2 percent in December, down from the revised November rate of 7.4 percent. The two counties' combined unemployment rate of 7.2 percent was slightly higher than the statewide rate of 7.0 percent in December.

Benton County's unemployment rate was the lowest unemployment rate among Oregon's 36 counties. Linn County's position was significantly worse, ranking 22<sup>nd</sup> among the counties.

In Linn County, nonfarm employment increased 370 jobs over the past 12 months. Benton County's employment is up 150 since December 2012.



## Labor Force Summary

In December, an estimated 2,213 Benton County residents were unemployed in a civilian labor force of 44,041. The number of residents unemployed decreased 232 since December 2012. Benton County had 41,828 employed residents, including payroll employees, the self-employed, farm workers, and a number of residents commuting outside of the county for work.

An estimated 4,522 Linn County residents were unemployed in December out of a civilian labor force of 53,078. There were 48,556 Linn County residents employed in December, including payroll employees, self-employed, farm workers, and residents commuting outside the county for work. Overall, there were 1,117 fewer residents unemployed compared with December 2012.

## Nonfarm Payroll Employment

Benton County's December total nonfarm employment was 38,980. Private-sector employment decreased 240 over the month and the public sector lost 80 jobs. Benton County's employment losses in December were less than normal; total nonfarm employment decreased 320 jobs, when a decrease of roughly 400 jobs would be expected. The difference results in a 80-job seasonally

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adjusted increase between November and December. Benton County's current employment level is down 330 jobs, or 0.8 percent, from its pre-recession employment peak, which occurred in May 2008.

Over the past 12 months, Benton County's employment is up 150 jobs. The private sector added 50 jobs over that time, while the public sector added 100 jobs.

The private industries in Benton County showing employment growth over the past 12 months were mining, logging, and construction (+130 jobs) and educational and health services (+170). In the public sector, federal government employment shed 40 jobs over the past 12 months. State government employment added 150 and local government employment is down 10 from its level 12 months ago.

Benton County's industries showing the largest employment change in December included state government (-90 jobs) and leisure and hospitality (-90).

Linn County's total nonfarm payroll employment decreased 100 in December. The county's employment typically adds about 20 jobs in December, which means Linn County's seasonally adjusted employment in December decreased 120. Linn County's employment was up 370 from December 2012 to December 2013. From February 2008 (Linn County's pre-recession employment peak) to December 2013, Linn County lost more than 4,000 jobs, or 9.3 percent.

The private-sector industries adding jobs over the past 12 months in Linn County included wood product manufacturing (+120 jobs), construction (+230), and retail trade (+100).

Linn County's retail trade sector employment increased 20 in December. Other private-sector industries showing employment gains in December included private educational and health services (+20 jobs), leisure and hospitality (+50), and information (+10).

Linn County's government sector shed 90 jobs between November and December. Employment levels in federal government were unchanged. Local government dropped 80 jobs in December, while state government employment dropped 10. Linn County's public sector employment grew by 20 over the past 12 months.

## **Outlook**

Benton County's employment level has shown slow growth over the past 12 months. Benton County's employment gains in recent years have been aided by record enrollment levels at Oregon State University that have boosted employment in both the public and private sectors. Linn County's employment has been fairly stable over the past 12 months, and the private sector has added jobs while public sector employment has been stable. Nearly one out of 10 jobs have disappeared in Linn County since February 2008.

These preliminary estimates will be revised as new data from businesses becomes available.

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## News From Around the Region

*Material gathered from published, nonconfidential sources.*

**I Sleep USA Mattress Superstore** opened in **Corvallis**. *Corvallis Gazette-Times, 1/20/2014*

**Ivan's Cheesesteak**, a sandwich shop, opened in **Lebanon**. It employs seven people. *Lebanon Express, 1/8/2014*

**Albertsons** grocery store in **Albany** will close next month. It employs 68 people. *Albany Democrat-Herald, 1/14/2014*

**Emmons Meat Market** near **Corvallis** will close at the end of the month. *Corvallis Gazette-Times, 1/23/2014*

## New 2013 Population Estimates

The 2013 population estimates from Portland State University's Population Research Center were recently published. Those estimates show that Oregon gained 35,285 residents in 2013, growing 0.9 percent. That outpaces last year when the state added 26,110 residents to grow 0.7 percent.

Gilliam County showed the fastest population growth of Oregon's 36 counties, growing 2.4 percent in 2013. At the other end of the spectrum, Harney County's loss of 55 residents, or 0.8 percent, was the sharpest population decline among Oregon's counties.

Population Estimates for Oregon and Benton County and its Incorporated Cities				
	Population Estimate July 1, 2013	Population Estimate July 1, 2012	Population Change 2012-2013	Percent Change 2012-2013
Oregon	3,919,020	3,883,735	35,285	0.9%
Benton County	87,725	86,785	940	1.1%
Adair Village	845	845	0	0.0%
Albany*	50,720	50,710	10	0.0%
Corvallis	55,345	55,055	290	0.5%
Monroe	620	615	5	0.8%
Philomath	4,625	4,620	5	0.1%

*Source: Portland State University Population Research Center*  
\*City is located and has population in more than one county.

## Benton County

Benton County added 940 residents in 2013, growing 1.1 percent and outpacing Oregon's rate of growth. Benton County's population growth in 2013 was eighth fastest among Oregon's counties. Corvallis added the most residents among the cities, adding 290, or 0.5 percent. Monroe and Philomath each added five residents.

Because the city of Albany is located in both Benton and Linn counties we can't simply subtract the sum all of city's growth from Benton County's growth to determine the growth taking place in unincorporated parts of Benton County. However, it certainly appears that a majority of the county's growth occurred in unincorporated parts of the county.

## Linn County

Linn County added 630 residents in 2013, growing 0.5 percent. Linn County's population growth in 2013 was 20<sup>th</sup> fastest among Oregon's 36 counties.

Millersburg was the county's fastest growing city, adding 55 residents in 2013 to grow 4.0 percent. Sweet Home added 40 residents and Lebanon added 30 residents. Albany and Tangent added 10 and 5 residents, respectively. All other cities in Linn County had no change to their population from 2012 to 2013.

Because Linn County has a number of cities that have population in multiple counties we can't simply subtract the sum all of city's growth from Linn County's growth to determine the growth taking place in unincorporated parts of Linn County. However, it certainly appears that a majority of the county's growth occurred in unincorporated parts of the county in 2013.

	Population Estimate July 1, 2013	Population Estimate July 1, 2012	Population Change 2012-2013	Percent Change 2012-2013
Oregon	3,919,020	3,883,735	35,285	0.9%
Linn County	118,665	118,035	630	0.5%
Albany*	50,720	50,710	10	0.0%
Brownsville	1,670	1,670	0	0.0%
Gates*	485	485	0	0.0%
Halsey	915	915	0	0.0%
Harrisburg	3,630	3,630	0	0.0%
Idanha*	135	135	0	0.0%
Lebanon	15,690	15,660	30	0.2%
Lyons	1,160	1,160	0	0.0%
Mill City*	1,870	1,870	0	0.0%
Millersburg	1,430	1,375	55	4.0%
Scio	830	830	0	0.0%
Sodaville	310	310	0	0.0%
Sweet Home	9,065	9,025	40	0.4%
Tangent	1,185	1,180	5	0.4%
Waterloo	230	230	0	0.0%

*Source: Portland State University Population Research Center*  
 \*City is located and has population in more than one county.

## Oregon Employment

Oregon's seasonally adjusted unemployment rate dropped to 7.0 percent in December from 7.3 percent in November. December marked Oregon's lowest unemployment rate since August 2008, when the rate was 6.7 percent.

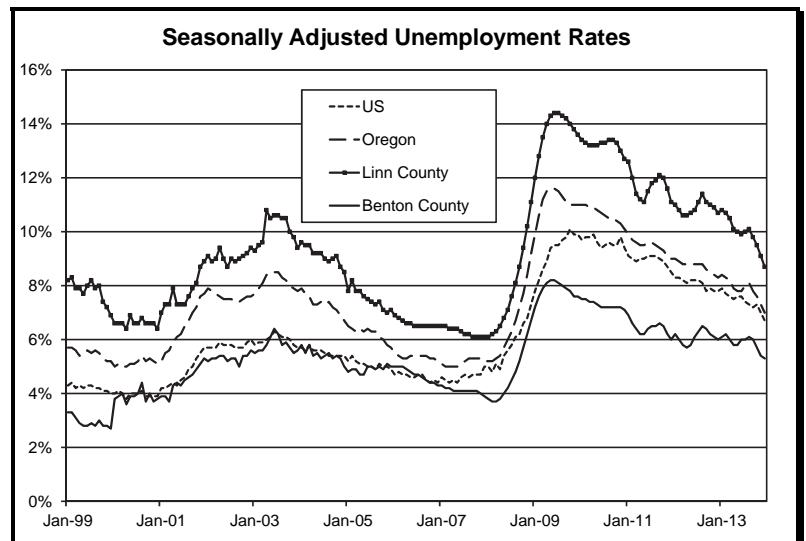
In December, Oregon's unemployment rate fell as more people were able to find jobs and there were fewer unemployed. There were nearly 132,000 Oregonians unemployed compared with approximately 160,000 a year earlier. This drop of more than 28,000 individuals since December 2012 was good news for many families in the state and for many sectors of Oregon's economy.

Oregon's job growth in 2013 was much stronger than in the prior two years. In 2013, 37,700 jobs were added, compared with 22,000 in 2012 and 18,400 in 2011.

In recent months, the pace of expansion has accelerated. Seasonally adjusted payroll employment rose 4,400 in December, following a revised gain of 4,300 in November. Monthly gains have been the norm for some time now, with gains occurring in 13 of the past 15 months.

Job gains in December were concentrated in three of the 11 major industries: professional and business services (+1,600 jobs), government (+1,200) and other services (+900).

Professional and business services grew rapidly in December and throughout last year. The sector gained 7,500 jobs, or 3.8 percent, since December 2012, to grow faster than any major industry other than construction. It reached another all-time high in December, on a seasonally adjusted basis. Each of its three component industries (professional and technical services, management of companies and enterprises, and administrative and waste services) expanded rapidly over the past three years.



Government cut only 1,700 jobs in December, during a month when a loss of 2,900 is expected due to seasonal factors. State government was close to a record high as it employed 82,700 in December, a gain of 1,200 in 12 months. Meanwhile, local government employed only 183,800 in December, which was its lowest December figure in nine years.

Other services added 400 jobs when a loss of 500 is the normal seasonal movement for December. Employment growth accelerated over the last three years. The industry added more than 2,000 jobs in 2013, which was equal to a growth rate of 3.7 percent.

## National Employment

The unemployment rate declined from 7.0 percent to 6.7 percent in December, while total nonfarm payroll employment edged up (+74,000), the U.S. Bureau of Labor Statistics reported. Employment rose in retail trade and wholesale trade but was down in information.

The number of unemployed persons declined by 490,000 to 10.4 million in December, and the unemployment rate declined by 0.3 percentage point to 6.7 percent. Over the year, the number of unemployed persons and the unemployment rate were down by 1.9 million and 1.2 percentage points, respectively.

Total nonfarm payroll employment edged up in December (+74,000). In 2013, job growth averaged 182,000 per month, about the same as in 2012 (+183,000 per month). In December, job gains occurred in retail trade and wholesale trade, while employment declined in information.

Employment in retail trade rose by 55,000 in December. Within the industry, job gains occurred in food and beverage stores (+12,000), clothing and accessories stores (+12,000), general merchandise stores (+8,000), and motor vehicle and parts dealers (+7,000). Retail trade added an average of 32,000 jobs per month in 2013.



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In December, wholesale trade added 15,000 jobs. Most of the job growth occurred in electronic markets and agents and brokers (+9,000). Wholesale trade added an average of 8,000 jobs per month in 2013.

Employment in professional and business services continued to trend up in December (+19,000). In 2013, job growth in professional and business services averaged 53,000 per month. Within the industry, temporary help services added 40,000 jobs in December, while employment in accounting and bookkeeping services declined by 25,000.

Manufacturing employment continued to trend up in December (+9,000). Employment rose in primary metals (+4,000) and petroleum and coal products (+2,000), while electronic instruments (-4,000) lost jobs. Manufacturing added 77,000 jobs in 2013, compared with an increase of 154,000 jobs in 2012.

Employment in mining edged up in December (+5,000). The industry added 29,000 jobs over the year.

Health care employment changed little in December (-6,000). Employment gains in the industry averaged 17,000 per month in 2013, compared with an average monthly gain of 27,000 in 2012.

**Current Labor Force and Industry Employment**  
**CORVALLIS (Benton County) MSA LABOR FORCE SUMMARY**  
 (by place of residence)

	Dec. 2013	Nov. 2013	Dec. 2012	-Change from-	
				Nov. 2013	Dec. 2012
Civilian Labor Force	44,041	44,527	44,647	-486	-606
Unemployment	2,213	2,097	2,445	116	-232
Percent of Labor Force	5.0%	4.7%	5.5%	XX	XX
Total Employment	41,828	42,430	42,202	-602	-374
Seasonally Adjusted Unemployment Rate	5.3%	5.4%	5.9%	XX	XX

**CORVALLIS MSA (Benton County) NONFARM PAYROLL EMPLOYMENT**  
 (by place of work)

	Dec. 2013	Nov. 2013	Dec. 2012	-Change from-	
				Nov. 2013	Dec. 2012
TOTAL NONFARM PAYROLL EMPLOYMENT	38,980	39,300	38,830	-320	150
SEASONALLY ADJUSTED NONFARM PAYROLL EMPLOYMENT	38,540	38,460	38,410	80	130
TOTAL PRIVATE	24,890	25,130	24,840	-240	50
Mining, logging, and Construction	1,170	1,190	1,040	-20	130
Manufacturing Total	2,960	3,000	3,130	-40	-170
Durable Goods	2,610	2,690	2,780	-80	-170
Trade, Transportation, and Utilities	4,150	4,180	4,150	-30	0
Information	620	640	700	-20	-80
Financial Activities	1,270	1,300	1,330	-30	-60
Professional and Business Services	3,830	3,810	3,920	20	-90
Educational and Health Services	6,000	6,030	5,830	-30	170
Health Care and Social Assistance	5,550	5,550	5,420	0	130
Leisure and Hospitality	3,660	3,750	3,540	-90	120
Other Services	1,230	1,230	1,200	0	30
Government	14,090	14,170	13,990	-80	100
Federal Government	500	490	540	10	-40
State Government	10,900	10,990	10,750	-90	150
State Government Educational Services	10,520	10,620	10,370	-100	150
Local Government	2,690	2,690	2,700	0	-10
Local Government Educational Services	1,410	1,400	1,400	10	10
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. "Natural Resources" includes only logging (NAICS 1133).

**Current Labor Force and Industry Employment**  
**LINN COUNTY LABOR FORCE SUMMARY**  
 (by place of residence)

	Dec.	Nov.	Dec.	-Change from-	
	2013	2013	2012	Nov. 2013	Dec. 2012
Civilian Labor Force	53,078	53,397	53,828	-319	-750
Unemployment	4,522	4,487	5,639	35	-1,117
Percent of Labor Force	8.5%	8.4%	10.5%	XX	XX
Total Employment	48,556	48,910	48,189	-354	367
Seasonally Adjusted Unemployment Rate	8.7%	9.1%	10.6%	XX	XX

**LINN COUNTY NONFARM PAYROLL EMPLOYMENT**  
 (by place of work)

	Dec.	Nov.	Dec.	-Change from-	
	2013	2013	2012	Nov. 2013	Dec. 2012
TOTAL NONFARM PAYROLL EMPLOYMENT	39,730	39,830	39,360	-100	370
SEASONALLY ADJUSTED NONFARM PAYROLL EMPLOYMENT	39,330	39,450	38,970	-120	360
TOTAL PRIVATE	32,360	32,370	32,010	-10	350
Mining and Logging	430	430	420	0	10
Construction	2,130	2,170	1,900	-40	230
Manufacturing Total	6,850	6,860	6,730	-10	120
Durable Goods	5,010	5,030	4,840	-20	170
Wood Product Manufacturing	1,530	1,530	1,410	0	120
Primary Metal Manufacturing	1,720	1,720	1,690	0	30
Nondurable Goods	1,840	1,830	1,890	10	-50
Trade, Transportation, and Utilities	8,860	8,850	8,860	10	0
Wholesale Trade	1,420	1,420	1,400	0	20
Retail Trade	4,890	4,870	4,790	20	100
Transportation, Warehousing, and Utilities	2,550	2,560	2,670	-10	-120
Information	370	360	360	10	10
Financial Activities	1,160	1,170	1,210	-10	-50
Professional and Business Services	3,060	3,110	3,090	-50	-30
Administrative and Support Services	1,850	1,900	1,900	-50	-50
Educational and Health Services	5,080	5,060	5,060	20	20
Health Care and Social Assistance	4,560	4,530	4,560	30	0
Health Care	3,480	3,490	3,500	-10	-20
Leisure and Hospitality	3,100	3,050	3,080	50	20
Accommodation and Food Services	2,780	2,790	2,740	-10	40
Other Services	1,320	1,310	1,300	10	20
Government	7,370	7,460	7,350	-90	20
Federal Government	310	310	300	0	10
State Government	1,210	1,220	1,200	-10	10
Local Government	5,850	5,930	5,850	-80	0
Local Government Educational Services	3,770	3,850	3,760	-80	10
Local Government Excluding Education	2,080	2,080	2,090	0	-10
LABOR-MANAGEMENT DISPUTES	0	0	0	0	0

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**February 2014**

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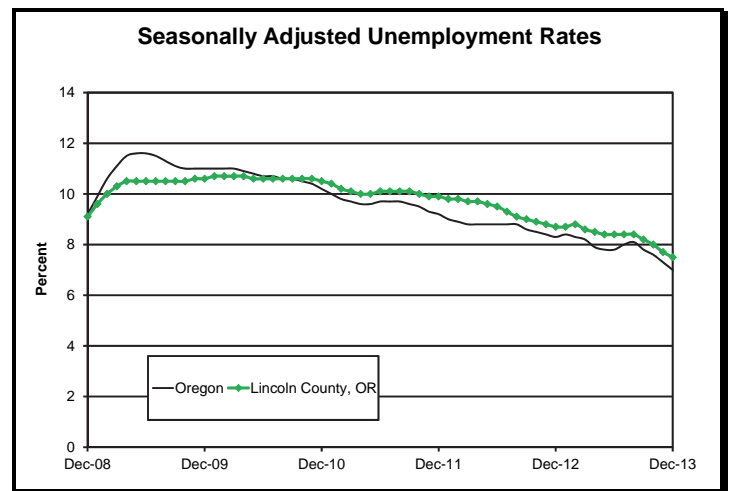
- **Unemployment rate unchanged in Lincoln County in December**
- **Job count falls by 110 in December on a seasonally adjusted basis**
- **County population increases (Page 2)**
- **Youth employment falling (Page 3)**

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## Lincoln County

Lincoln County's seasonally adjusted unemployment rate was 7.5 percent in December, essentially unchanged from the previous month (7.7%), but down from the year before (8.7%). The unemployment rate for Lincoln County was close to the statewide rate (7.0%), but higher than the national rate (6.7%). Lincoln County's unemployment rate ranked as the 17<sup>th</sup> lowest of Oregon's 36 counties in December. The rate was stuck above 10 percent for nearly all of 2009, 2010, and 2011. It has declined slowly but fairly steadily since then.



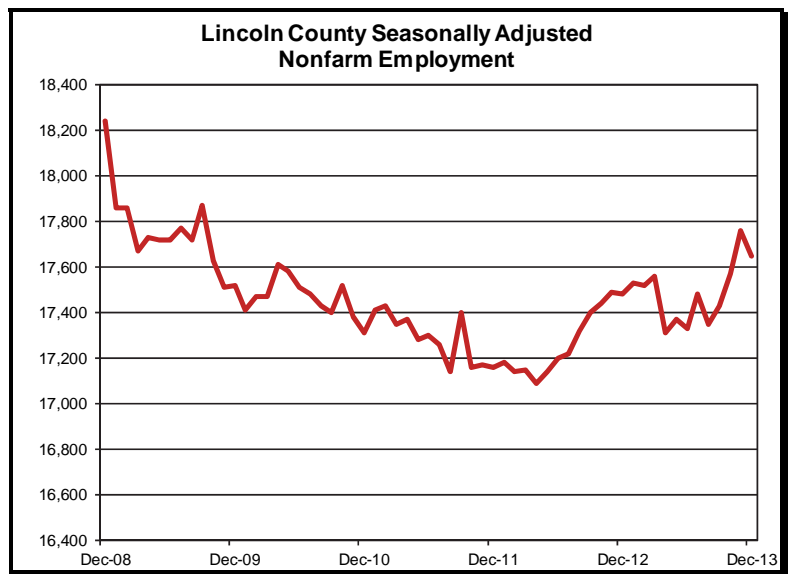
Seasonally adjusted nonfarm payroll employment fell by 110 jobs in December to 17,650. Seasonally adjusted figures compare expected changes with actual changes. A loss of 240 jobs is normal for the month, but the number of jobs in the county fell by 350.

### Economic Indicators

	Seasonally Adjusted Unemployment Rates		Seasonally Adjusted Employment Change		2012 Average Pay Per Job
	December	November	Monthly	Annual	Annual
Lincoln	7.5%	7.7%	-110	170	\$31,806
Tillamook	6.3%	6.6%	-50	190	\$32,287

The private sector shed 300 jobs in December and government employment slid by 50. The leisure and hospitality industry cut 240 jobs, while the professional and business services and construction sectors each trimmed 30. Food manufacturing added 20 jobs. Local government education dropped by 30 jobs.

December's total nonfarm payroll employment was 160 more than one year before. Total private sector employment grew by 260 jobs and government employment was down by 100. Industries adding the most jobs over the past year included retail trade (+240) and leisure and hospitality (+130). Industries cutting the most jobs included state government (-70), construction (-70), and private educational and health services (-80).



## Community News

**Newport Emporium of Digital Entertainment and Surveillance** opened in **Newport**. It offers computer, home theater, and video surveillance installation and support. *News-Times, 12/31/2013*

Portland-based **The Hingson Law Firm** opened an office in **Newport**. *News-Times, 1/8/2014*

**Paper Mermaids**, a scrapbooking supply store in **Newport**, closed. *News-Times, 1/22/2014*

## Oregon Employment

Oregon's seasonally adjusted unemployment rate dropped to 7.0 percent in December from 7.3 percent in November. December marked Oregon's lowest unemployment rate since August 2008, when the rate was 6.7 percent.

In December, Oregon's unemployment rate fell as more people were able to find jobs and there were fewer unemployed. There were nearly 132,000 Oregonians unemployed compared with approximately 160,000 a year earlier. This drop of more than 28,000 individuals since December 2012 was good news for many families in the state and for many sectors of Oregon's economy.

Oregon's job growth in 2013 was much stronger than in the prior two years. In 2013, 37,700 jobs were added, compared with 22,000 in 2012 and 18,400 in 2011.

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In recent months, the pace of expansion has accelerated. Seasonally adjusted payroll employment rose 4,400 in December, following a revised gain of 4,300 in November. Monthly gains have been the norm for some time now, with gains occurring in 13 of the past 15 months.

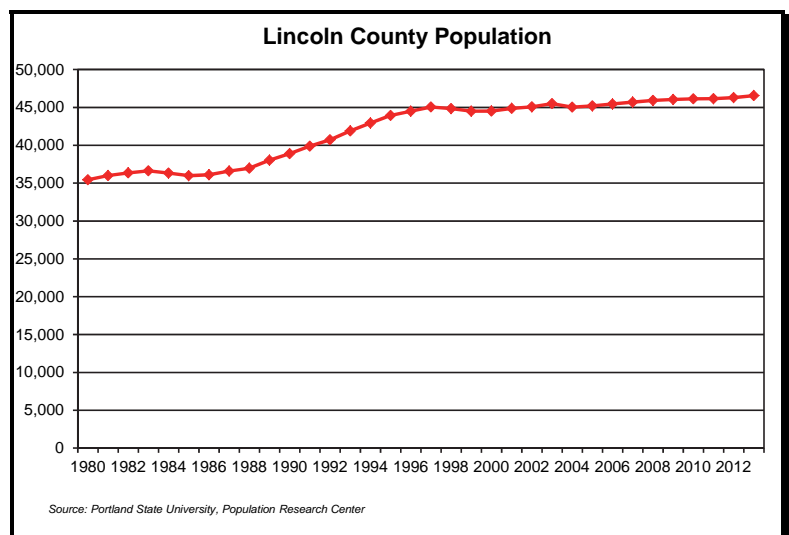
Job gains in December were concentrated in three of the 11 major industries: professional and business services (+1,600 jobs), government (+1,200) and other services (+900).

## Lincoln County and Cities Population

The population of Lincoln County increased by 265 from 2012 to an estimated 46,560 in 2013. The average annual growth rate since 2010 has been about 0.3 percent. This was slower than the 1.4 percent rate during the 1990s or the 0.9 percent rate of the 1980s. The Census of 2010 showed that actual population in the region was higher than the previous estimates indicated.

Growth slowed considerably during the recession in Lincoln County. The county added only 20 residents in 2011, when the county's employment bottomed out at about 17,000 payroll jobs.

Lincoln County has been growing over the long run (Graph 1) but the growth has been uneven. From 1986 to 1996 the county's population grew by 8,393, an annual average rate of 2.1 percent. Before and after this period, growth has been much slower. Since 1996 the county added only 2,060 residents, an annual average growth rate of 0.3 percent per year.



Graph 1

Lincoln County's population increase is due primarily to migration. In most years the county has more deaths than births.

### Cities

Most of Lincoln County's recent population increase in cities has been concentrated in Newport and Lincoln City, both located along the coast. Another smaller coastal city, Yachats, added a fair number of residents. This city also had the fastest rate of growth since 2010. The cities of Toledo and Depoe Bay had essentially no change in their

Table 1

Lincoln County Population, 2013				
County and City	2013 Population Estimate	Change Since 2010	Annual Average Change 2010-2013	2010 Census
LINCOLN	46,560	425	0.3%	46,135
Depoe Bay	1,405	5	0.1%	1,400
Lincoln City	8,020	85	0.4%	7,935
Newport	10,160	130	0.4%	10,030
Siletz	1,235	25	0.7%	1,210
Toledo	3,470	-	0.0%	3,470
Waldport	2,050	15	0.2%	2,035
Yachats	715	25	1.2%	690
Unincorporated	19,505	140	0.2%	19,365

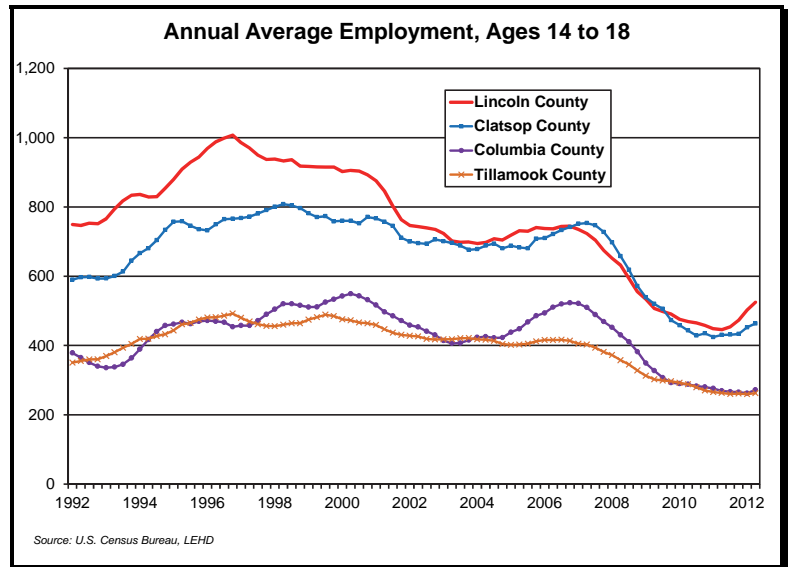
Source: Population Research Center, Portland State University

population levels from 2010. About 40 percent of the county's residents live in unincorporated areas and about one-third of the population growth occurred in unincorporated areas of the county. As with the cities, most people in unincorporated areas live along the coast. Siletz is the only completely inland city. Toledo is several miles from the coast but lies at the head of Yaquina Bay.

## Youth Employment in Northwest Oregon

The number of teenagers working in Northwest Oregon fell nearly by half since the turn of the century. The Census Bureau estimates that there was an annual average of nearly 2,700 youth of ages 14 through 18 working in Clatsop, Columbia, Lincoln, and Tillamook counties in 2000. By 2012 the number fell to about 1,500.

The drop in working youth was also true at the state and national levels. The unemployment rate for Oregon youth ages 16 through 19 topped 30 percent during the recession. Nationally, labor force participation for ages 16 through 19 fell from 47 percent in 2002 to 34 percent in 2012.



Every county in Northwest Oregon shows the pattern of falling youth employment. Clatsop and Lincoln counties have more working youth – but also lost large numbers of youth from the workforce during the recession. Columbia County actually had the biggest percentage drop in youth employment during the recession, losing a full 50 percent of youth employment from 2007 through 2012.

Although all age groups were hit hard by the recession, youth especially suffered. They typically have less work experience and education than older workers, two attributes valuable to employers. Data on college and community college enrollment show that most youth were not idle, however. College enrollment soared during the recession.



**LINCOLN COUNTY CURRENT LABOR FORCE AND INDUSTRY EMPLOYMENT**

**(by place of residence)**

	December 2013	November 2013	December 2012	Change From November 2013	Change From December 2012
Civilian labor force	21,472	21,898	22,063	-426	-591
Unemployed	1,629	1,618	1,976	11	-347
Unemployment rate	7.6%	7.4%	9.0%	0.2	-1.4
Unemployment rate, seasonally adjusted	7.5%	7.7%	8.7%	-0.2	-1.2
Total Employment	19,843	20,280	20,087	-437	-244

**LINCOLN COUNTY NONFARM PAYROLL EMPLOYMENT**

**(by place of work)**

	December 2013	November 2013	December 2012	Change from November 2013	Change from December 2012
<b>TOTAL NONFARM PAYROLL EMPLOYMENT</b>					
Total nonfarm	17,190	17,540	17,030	-350	160
Total nonfarm, seasonally adjusted	17,650	17,760	17,480	-110	170
<b>TOTAL PRIVATE</b>	13,310	13,610	13,050	-300	260
Mining and Logging	150	150	150	0	0
Construction	600	630	670	-30	-70
Manufacturing	1,110	1,100	1,040	10	70
Durable Goods	160	170	180	-10	-20
Nondurable Goods	950	930	860	20	90
Food Manufacturing	380	360	290	20	90
Trade, Transportation, and Utilities	3,520	3,540	3,280	-20	240
Retail Trade	3,010	3,030	2,770	-20	240
Food and Beverage Stores	650	660	640	-10	10
Transportation, Warehousing, and Utilities	330	320	350	10	-20
Information	180	170	170	10	10
Financial Activities	710	700	750	10	-40
Professional and Business Services	950	980	1,000	-30	-50
Educational and Health Services	1,700	1,690	1,780	10	-80
Leisure and Hospitality	3,790	4,030	3,660	-240	130
Accommodation and Food Services	3,570	3,730	3,500	-160	70
Accommodation	1,600	1,670	1,520	-70	80
Food Services and Drinking Places	1,970	2,060	1,980	-90	-10
Other Services	600	620	550	-20	50
<b>GOVERNMENT</b>	3,880	3,930	3,980	-50	-100
Federal Government	350	340	370	10	-20
State Government	640	650	710	-10	-70
Local Government	2,890	2,940	2,900	-50	-10
Indian tribal	1,020	1,030	1,070	-10	-50
Local Education	690	720	670	-30	20
Local Government, excluding Education and Tribal	1,180	1,190	1,160	-10	20
<b>LABOR-MANAGEMENT DISPUTES</b>	0	0	0	0	0

The most recent month is preliminary, the prior month is revised. Prepared by the Oregon Employment Department 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.

<b>Oregon Seasonally Adjusted Unemployment Rates by Area (1)</b>			
	<u>December 2013</u>	<u>November 2013</u>	<u>December 2012</u>
United States	6.7	7.0	7.9
State of Oregon	7.0	7.3	8.3
<u>Metropolitan Statistical Areas:</u>			
Bend (Deschutes County)	8.9	9.1	10.4
Corvallis (Benton County)	5.3	5.4	5.9
Eugene-Springfield (Lane County)	6.9	7.2	8.2
Medford (Jackson County)	9.1	9.3	10.4
Portland-Vancouver-Hillsboro (2)	6.6	6.8	7.7
Salem (Marion and Polk counties)	7.5	7.9	8.9
<u>Counties (1):</u>			
Baker	8.8	9.2	9.4
Benton	5.3	5.4	5.9
Clackamas	6.3	6.5	7.6
Clatsop	6.1	6.3	7.4
Columbia	7.5	7.7	9.1
Coos	9.2	9.5	10.5
Crook	11.2	11.6	13.5
Curry	10.0	10.2	11.2
Deschutes	8.9	9.1	10.4
Douglas	10.0	10.3	11.5
Gilliam	5.9	6.4	7.3
Grant	10.7	11.8	13.0
Harney	11.6	11.9	12.1
Hood River	5.6	5.7	6.6
Jackson	9.1	9.3	10.4
Jefferson	9.9	10.1	11.9
Josephine	9.9	10.2	11.6
Klamath	10.0	10.3	11.3
Lake	10.1	10.7	11.9
Lane	6.9	7.2	8.2
Lincoln	7.5	7.7	8.7
Linn	8.7	9.1	10.6
Malheur	8.2	8.5	9.6
Marion	7.8	8.0	9.2
Morrow	6.8	6.7	8.2
Multnomah	6.3	6.4	7.6
Polk	6.9	7.1	8.2
Sherman	6.1	6.5	7.4
Tillamook	6.3	6.6	7.8
Umatilla	7.6	7.9	8.2
Union	7.6	7.9	8.8
Wallowa	9.6	10.1	10.2
Wasco	6.9	7.1	7.5
Washington	5.7	5.8	6.9
Wheeler	6.5	7.1	7.0
Yamhill	6.6	6.8	8.1
<p>(1) Seasonally adjusted rates for the United States and Oregon are official Bureau of Labor Statistics (BLS) series. Source of Metro data is BLS and LAUS. Source of county data is OED.</p> <p>(2) Portland-Vancouver-Hillsboro MSA includes Clackamas, Columbia, Multnomah, Washington, and Yamhill counties in Oregon and Clark and Skamania counties in Washington.</p>			

February 2014

## Economic Indicators

### Unemployment Rates

	<u>Seas. Adj.</u>	<u>Raw</u>
<b>United States</b>		
Dec.	6.7%	6.5%
Nov.	7.0%	6.6%
<b>Oregon</b>		
Dec.	7.0%	6.9%
Nov.	7.3%	6.7%
<b>Crook</b>		
Dec.	11.2%	11.3%
Nov.	11.6%	10.9%
<b>Deschutes</b>		
Dec.	8.9%	8.9%
Nov.	9.1%	8.6%
<b>Jefferson</b>		
Dec.	9.9%	10.4%
Nov.	10.1%	9.7%
<b>Klamath</b>		
Dec.	10.0%	10.0%
Nov.	10.3%	9.4%
<b>Lake</b>		
Dec.	10.1%	10.0%
Nov.	10.7%	9.7%

### Consumer Price Index (CPI)

1982-1984 = 100

All Urban Consumers

#### United States

December	2013	233.05
November	2013	233.07
December	2012	229.61
Year % Change		1.5%

#### Portland-Salem, OR-WA MSA

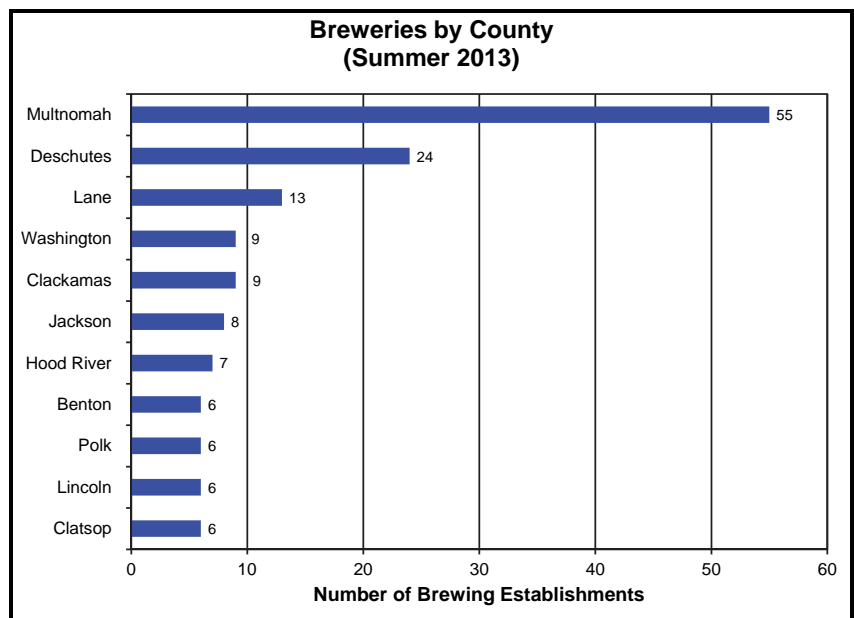
Jan. - Jun.	2013	233.73
% Change		2.2

<http://www.bls.gov/cpi>

## A Sneak Peak at the Brewing Industry in Central Oregon

It is no secret that Central Oregonians love their beer. Out here on the high desert, it is common to see locals smelling, swirling, and tasting IPA or porter rather than wine. As of the summer of 2013, there were 25 breweries in Central Oregon with 18 of those in Bend. I am working on a new report coming out later in February that will take a detailed look at the impact of the brewing industry in Oregon. In the meantime, let's take a closer look at the industry here in Central Oregon and the impact of these 25 breweries.

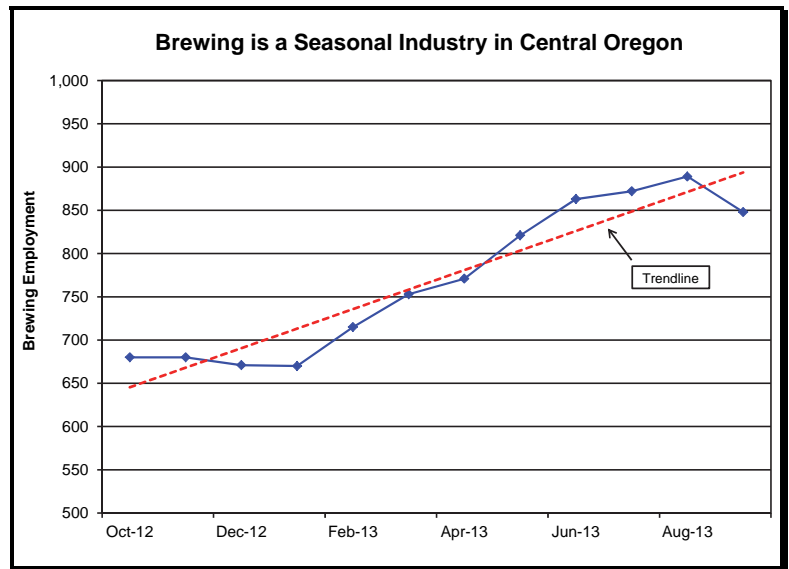
Brewing establishments fall into two general categories. There are manufacturing breweries that produce beer for general distribution. Many are smaller operations that tend to distribute kegs locally, while other operations may bottle or can their beer for a broader distribution. The other type of brewing establishment is a brewpub. These are pubs or eateries that brew beer onsite primarily for consumption at their pub. For this report only establishments that brew beer onsite are counted as a brewery. If a firm reports brewing at multiple locations, then each establishment is counted in the total number of brewing establishments.



As stated earlier, the vast majority of Central Oregon breweries are in Bend (18). However, there are four breweries in the Redmond area, as well as one each in Sunriver, Prineville, and Sisters. There are more breweries in Deschutes County (24) than any other county in Oregon except Multnomah, which is home to Portland and its 50 brewing establishments.

Breweries are large employers in Central Oregon. This past summer the brewing industry accounted for an average of 870 jobs. However, employment totals were likely a bit larger as it was not possible to verify the employment totals of the region's five newest brewing establishments. About 20 percent of the Central Oregon brewing establishments are manufacturing breweries, while the remaining establishments are brewpubs. The median Central Oregon brewing establishment employs 34 individuals.

Over the past year, Central Oregon added 117 brewing jobs, a growth rate of 15.5 percent. The only region to gain more brewing jobs over the year was the Willamette Valley, which gained 167 jobs or an increase of nearly 30 percent. Although the industry is growing, it also seems to be a seasonal industry that mimics the tourism season in Central Oregon. Employment levels are slightly higher in the summer and a bit lower in the winter. This seasonal influence is accounted for by the staffing patterns of local brewpubs, which track very closely with restaurant and other eating places. Manufacturing brewery employment is much more stable throughout the year.



These breweries contribute a significant amount of money to the local economy through wages paid to workers. Annual payroll from the fourth quarter of 2012 through the third quarter of 2013 was nearly \$23 million in Central Oregon. Over this period, average annual pay for brewing workers was \$29,836, less than Deschutes County's average annual pay of \$37,407. Due to the restaurant component of brewpubs, their average annual wage (\$19,705) is lower than manufacturing breweries (\$34,248). Restaurants tend to employ a higher concentration of low-wage occupations and many of these are part-time jobs.

Although average pay in Central Oregon's brewing industry is lower than the regional average, the industry remains an important component of our economy. Besides contributing jobs and wages, brewing establishments that distribute their tasty craft beers outside the region bring in fresh dollars that can be recirculated in the local economy. Finally, these brewing establishments are also tourist attractions that draw visitors to Central Oregon tempted by our famous brews.

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To see the complete report on the brewing industry in Oregon, view the upcoming March issue of *Oregon Labor Trends* at [www.QualityInfo.org](http://www.QualityInfo.org).

## Central and South Central Oregon Employment Situation for December 2013

Central Oregon finished 2013 on a positive note, with unemployment down to levels not seen in more than five years, and hiring up. The Bend MSA (Deschutes County) seasonally adjusted unemployment rate dropped to 8.9 percent in December, the first time unemployment was below 9 percent since August of 2008. Crook County's rate dropped to 11.2 percent, a drop of 2.3 percentage points from last December. Jefferson County dipped to 9.9 percent. Klamath County's seasonally adjusted unemployment rate in December was 10.0 percent, a decline of 1.3 percentage points from last December. Lake County dropped to 10.1 percent in December, an over-the-year drop of 1.8 percentage points. Nationally, unemployment declined in December to 6.7 percent. Oregon's rate declined to 7.0 percent, the lowest level in more than five years.

**Crook County:** Crook County's seasonally adjusted unemployment rate was 11.2 percent in December, down from 11.6 percent in November. The unemployment rate has not been this low since September 2008. Over the past year, the county experienced a sharp drop in its seasonally adjusted unemployment rate from 13.5 percent in December 2012.

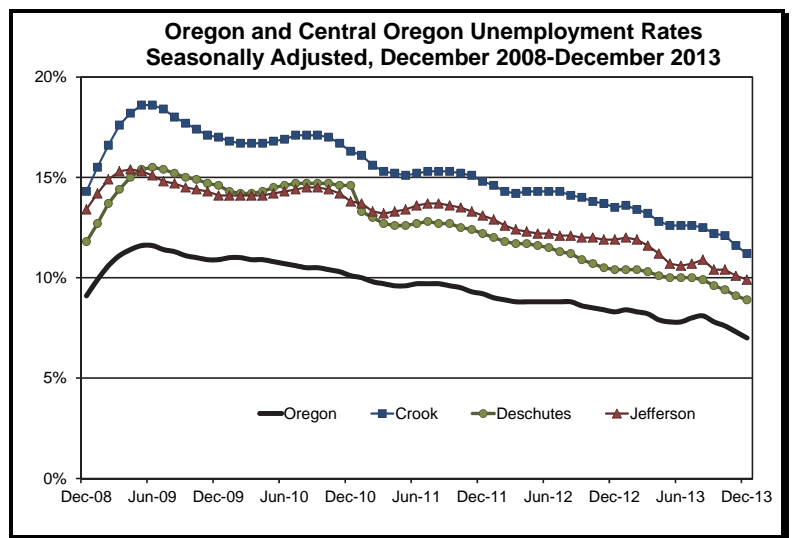
The county lost 70 jobs in December, which was fewer than the loss of 100 jobs expected this time of year.

Job losses over the past month were concentrated in seasonal industries such as construction (-20), federal government (-20), and leisure and hospitality (-10).

The private sector continues to lead the jobs recovery, gaining 300 jobs from last December. Over the year, government shed 40 jobs, primarily from local government (-30). Private-sector job growth was spread across a variety of industries with the largest gains in transportation, warehousing, and utilities (+80); wholesale trade (+60); and professional and business services (+40).

**Deschutes County (Bend MSA):** Deschutes County's seasonally adjusted unemployment rate (8.9%) dropped below 9 percent for the first time since the summer of 2008. The rate dropped from November when it was 9.1 percent. Over the year, the unemployment rate fell from 10.4 percent in December 2012.

Preliminary estimates from the federal Bureau of Labor Statistics (BLS) for the Bend metropolitan area show a decrease of 300 jobs in December. This represents a seasonally adjusted gain of 140 jobs. Monthly losses were concentrated in seasonal industries that would typically see declines this time of year, such as mining, logging, and construction (-250) and accommodation and food services



(-120). Significant gains were seen in private educational and health services (+110) and transportation, warehousing, and utilities (+70).

Over-the-year job gains continued in December with the county up 1,680 jobs from last year. Professional and business services posted the largest over-the-year gains adding 540 jobs, followed by retail trade (+450) and private educational and health services (+360). The only significant losses were seen in leisure and hospitality (-170).

**Jefferson County:** The seasonally adjusted unemployment rate decreased in December to 9.9 percent, down from 10.1 percent in November. Over the year, Jefferson County's seasonally adjusted unemployment rate dropped from the December 2012 rate of 11.9 percent.

Jefferson County lost 30 jobs in December when a loss of 100 jobs would typically be expected this time of year. Job losses were in leisure and hospitality (-20) and construction (-10); these losses are expected this time of year.

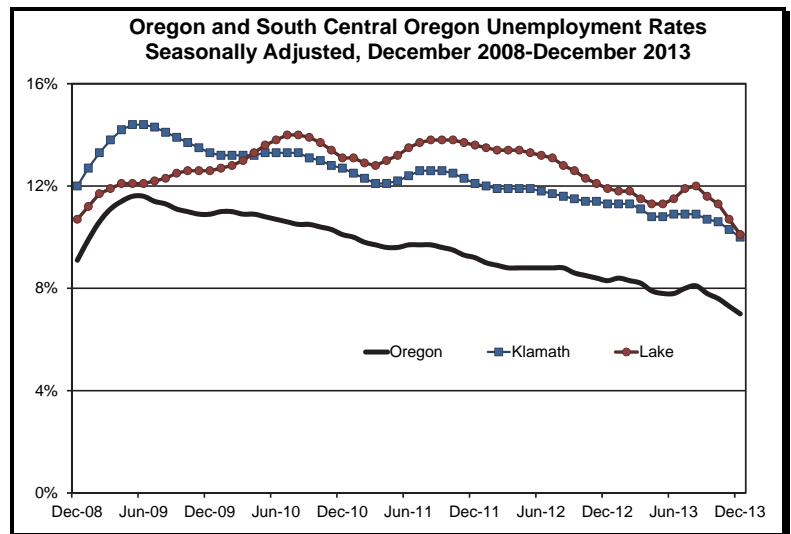
Over the past year, employment is up 230 jobs in Jefferson County. Manufacturing is responsible for a majority of these gains, up 150 jobs. Significant job gains were also posted in leisure and hospitality (+60) and retail trade (+40). Private-sector jobs losses were concentrated in wholesale trade (-40) and professional and business services (-20).

A code change occurred in January 2013 where a firm was moved from local government to private educational and health services. Due to this change a series break was created in total private, government, local government, and educational and health services. Monthly figures for 2012 in these industries are not comparable to 2013 monthly estimates.

**Klamath County:** Klamath County's seasonally adjusted unemployment rate dropped to 10.0 percent in December, a significant reduction from the November rate of 10.3 percent. Over the year, unemployment fell from 11.3 percent in December 2012.

The county lost 160 jobs in December, fewer than the expected loss of 240 jobs this time of year.

Monthly job losses continued in seasonal industries, such as construction (-60); leisure and hospitality (-50); and federal government (-50). Both manufacturing (+50) and private educational and health services (+40) posted significant gains from November.



Over-the-year employment gains continued in Klamath County, up 560 jobs from last December. The jobs recovery is being sustained by the private sector, which added 600 jobs. Significant gains were seen in educational and health services (+300) and manufacturing (+180). Most private industries posted gains from this time last year with the exception of financial activities (-90) and transportation, warehousing, and utilities (-30).

**Lake County:** Lake County continued to see rapid declines in the seasonally adjusted unemployment rate, down to 10.1 percent in December, a significant drop from November (10.7%). Over the year, the county's rate dropped nearly two percentage points from 11.9 percent in December 2012.

Total nonfarm employment decreased by 20 jobs in December, a normal seasonal decrease. Most monthly losses were concentrated in government, with the federal government shedding 20 jobs and local government down 10. Retail trade and manufacturing each gained 10 jobs from November.

Over the year, employment is up by just 20 jobs. Manufacturing (+20) was responsible for the largest gains; government, particularly federal government (-20), continues to be a drag on the jobs recovery.

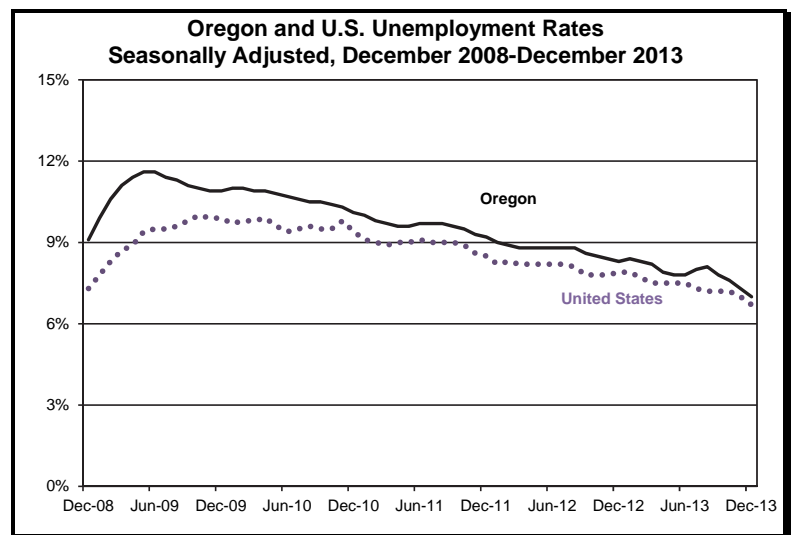
**Oregon Employment:** Oregon's seasonally adjusted unemployment rate dropped to 7.0 percent in December from 7.3 percent in November. December marked Oregon's lowest unemployment rate since August 2008, when the rate was 6.7 percent.

In December, Oregon's unemployment rate fell as more people were able to find jobs and there were fewer unemployed. There were nearly 132,000 Oregonians unemployed compared with approximately 160,000 a year earlier. This drop of more than 28,000 individuals since December 2012 was good news for many families in the state and for many sectors of Oregon's economy.

In recent months, the pace of expansion has accelerated. Seasonally adjusted payroll employment rose 4,400 in December, following a revised gain of 4,300 in November. Monthly gains have been the norm for some time now, with gains occurring in 13 of the past 15 months.

**National Employment:** The unemployment rate declined from 7.0 percent to 6.7 percent in December, while total nonfarm payroll employment edged up (+74,000), the U.S. Bureau of Labor Statistics reported.

Total nonfarm payroll employment edged up in December (+74,000). In 2013, job growth averaged 182,000 per month, about the same as in 2012 (+183,000 per month). In December, job gains occurred in retail trade and wholesale trade, while employment declined in information.



## Happenings in Central and South Central Oregon

*The following information is from published nonconfidential sources.*

### **Crook County**

No items reported.

### **Deschutes County (Bend MSA)**

**Chelsea Bothum** opened a massage practice in **Sisters**. *The Nugget Newspaper, 12/10/2013*

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**Wall Street Suites** opened in **Bend**. It features 15 luxury suites and two guest rooms. *Cascade Business News, 12/19/2013*

**The Dogwood Cocktail Cabin**, a bar and lounge, will open in **downtown Bend** in February. *The Bulletin, 12/28/2013*

**Cascade Rack** opened in **Bend**. It offers car and truck racks, hitches, and garage storage racks for bikes, skis, snowboards, kayaks, and canoes. *The Bulletin, 12/27/2013*

**CVT Cascadia Vehicle Tents** opened a showroom in **Bend**. *The Bulletin, 12/24/2013*

**Bend Memorial Clinic** will open a new clinic in **Bend**. *The Bulletin, 1/3/2014*

**Pacific Pizza & Brew** will open in **southwest Bend**. *The Bulletin, 1/15/2014*

**Bend Modern**, a store offering vintage mid-century modern furniture and collectibles, will open in **Bend** next month. *The Bulletin, 1/11/2014*

**Altrec Inc.**, an online retailer of outdoor clothing and gear in **Redmond**, filed for bankruptcy protection and is looking for a buyer for the company. It employs 28 people. *The Bulletin, 1/8/2014*

**Legum Design**, an interior design firm, opened in **Bend**. *The Bulletin, 1/11/2014*

**Robberson Ford** auto dealership in **Bend** will undergo a \$5-million remodel and expansion. *The Bulletin, 1/4/2014*

#### **Jefferson County**

**Haystack Farm & Feeds**, a mill near **Culver** that turns bales of hay into pellets, will expand and increase its output by 30 to 40 percent. *The Bulletin, 1/15/2014*

#### **Klamath County**

**Main Street Jewelers** in **Klamath Falls** will close. *Herald and News, 12/22/2013*

#### **Lake County**

**Jacob Lambert Construction** near **Christmas Valley** is expanding its business to include a lumberyard. *Lake County Examiner, 1/6/2014*

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## Crook County Current Labor Force and Industry Employment

	Dec. 2013	Nov. 2013	Dec. 2012	Change From Nov. 2013	Change From Dec. 2012
<b>Labor Force Status (Household Data)</b>					
Civilian labor force	8,579	8,689	8,615	-110	-36
Unemployed	970	944	1,224	26	-254
Unemployment rate	11.3%	10.9%	14.2%	XX	XX
Unemployment rate, seasonally adjusted	11.2%	11.6%	13.5%	XX	XX
Employed	7609	7745	7391	-136	218
<b>Nonfarm Payroll Employment (Establishment Data)</b>					
Total nonfarm payroll employment	5,640	5,710	5,380	-70	260
Total private	4,450	4,490	4,150	-40	300
Mining and logging	90	100	100	-10	-10
Construction	210	230	190	-20	20
Manufacturing	730	740	700	-10	30
Wood product manufacturing	600	600	570	0	30
Trade, transportation, and utilities	1,570	1,590	1,440	-20	130
Wholesale trade	530	530	470	0	60
Retail trade	500	510	510	-10	-10
Transportation, warehousing, and utilities	540	550	460	-10	80
Information	90	80	60	10	30
Financial activities	150	140	160	10	-10
Professional and business services	300	300	260	0	40
Educational and health services	570	560	540	10	30
Leisure and hospitality	530	540	510	-10	20
Other services	210	210	190	0	20
Government	1,190	1,220	1,230	-30	-40
Federal government	270	290	270	-20	0
State government	190	190	200	0	-10
Local government	730	740	760	-10	-30
Labor-management disputes	0	0	0	0	0

## Deschutes County (Bend MSA) Current Labor Force and Industry Employment

	Dec. 2013	Nov. 2013	Dec. 2012	Change From Nov. 2013	Change From Dec. 2012
<b>Labor Force Status (Household Data)</b>					
Civilian labor force	74,249	74,732	77,163	-483	-2,914
Unemployed	6,636	6,456	8,216	180	-1,580
Unemployment rate	8.9%	8.6%	10.6%	XX	XX
Unemployment rate, seasonally adjusted	8.9%	9.1%	10.4%	XX	XX
Employed	67,613	68,276	68,947	-663	-1,334
<b>Nonfarm Payroll Employment (Establishment Data)</b>					
Total nonfarm payroll employment	64,430	64,730	62,750	-300	1,680
Total private	55,390	55,470	53,830	-80	1,560
Mining, logging, and construction	3,430	3,680	3,370	-250	60
Manufacturing	4,100	4,120	4,040	-20	60
Durable goods	3,050	3,050	2,980	0	70
Trade, transportation, and utilities	13,150	13,040	12,610	110	540
Wholesale trade	1,700	1,710	1,640	-10	60
Retail trade	10,190	10,140	9,740	50	450
Transportation, warehousing, and utilities	1,260	1,190	1,230	70	30
Information	1,390	1,380	1,390	10	0
Financial activities	4,110	4,110	4,120	0	-10
Professional and business services	6,960	7,020	6,420	-60	540
Educational and health services	10,630	10,520	10,270	110	360
Leisure and hospitality	9,200	9,260	9,370	-60	-170
Accommodation and food services	7,750	7,870	7,620	-120	130
Other services	2,420	2,340	2,240	80	180
Government	9,040	9,260	8,920	-220	120
Federal government	840	840	810	0	30
State government	1,180	1,180	1,120	0	60
Local government	7,020	7,240	6,990	-220	30
Local education	4,290	4,440	4,230	-150	60
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. "Natural resources" includes only Logging (NAICS 1133).

## Jefferson County Current Labor Force and Industry Employment

	Dec.	Nov.	Dec.	Change From	Change From
	2013	2013	2012	Nov.	Dec.
				2013	2012
<b>Labor Force Status (Household Data)</b>					
Civilian labor force	9,027	9,068	9,032	-41	-5
Unemployed	935	877	1,129	58	-194
Unemployment rate	10.4%	9.7%	12.5%	XX	XX
Unemployment rate, seasonally adjusted	9.9%	10.1%	11.9%	XX	XX
Employed	8,092	8,191	7,903	-99	189
<b>Nonfarm Payroll Employment (Establishment Data)</b>					
Total nonfarm payroll employment	5,970	6,000	5,740	-30	230
Total private*	3,510	3,510	3,080	0	430
Mining and logging	30	30	20	0	10
Construction	80	90	80	-10	0
Manufacturing	1,000	990	850	10	150
Wood product manufacturing	650	640	530	10	120
Trade, transportation, and utilities	840	830	840	10	0
Wholesale trade	160	150	200	10	-40
Retail trade	550	550	510	0	40
Transportation, warehousing, and utilities	130	130	130	0	0
Information	30	30	30	0	0
Financial activities	120	120	110	0	10
Professional and business services	140	140	160	0	-20
Educational and health services*	580	570	360	10	220
Leisure and hospitality	520	540	460	-20	60
Other services	170	170	170	0	0
Government*	2,460	2,490	2,660	-30	-200
Federal government	130	130	140	0	-10
State government	320	310	330	10	-10
Local government*	2,010	2,050	2,190	-40	-180
Indian tribal	1,140	1,160	1,080	-20	60
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. "Natural resources" includes only Logging (NAICS 1133).

## Klamath County Current Labor Force and Industry Employment

	Dec. 2013	Nov. 2013	Dec. 2012	Change From Nov. 2013	Change From Dec. 2012
<b>Labor Force Status (Household Data)</b>					
Civilian labor force	28,998	29,107	30,079	-109	-1,081
Unemployed	2,902	2,740	3,479	162	-577
Unemployment rate	10.0%	9.4%	11.6%	XX	XX
Unemployment rate, seasonally adjusted	10.0%	10.3%	11.3%	XX	XX
Employed	26,096	26,367	26,600	-271	-504
<b>Nonfarm Payroll Employment (Establishment Data)</b>					
Total nonfarm payroll employment	21,930	22,090	21,370	-160	560
Total private	16,680	16,750	16,080	-70	600
Mining and logging	150	170	130	-20	20
Construction	680	740	660	-60	20
Manufacturing	1,900	1,850	1,720	50	180
Durable goods	1,670	1,640	1,490	30	180
Wood product manufacturing	1,160	1,130	1,010	30	150
Nondurable goods	230	210	230	20	0
Trade, transportation, and utilities	4,490	4,530	4,430	-40	60
Wholesale trade	840	850	800	-10	40
Retail trade	2,940	2,960	2,890	-20	50
Food and beverage stores	590	600	570	-10	20
General merchandise stores	910	890	900	20	10
Transportation, warehousing, and utilities	710	720	740	-10	-30
Information	190	190	190	0	0
Financial activities	730	740	820	-10	-90
Professional and business services	2,210	2,190	2,160	20	50
Educational and health services	3,450	3,410	3,150	40	300
Leisure and hospitality	2,190	2,240	2,130	-50	60
Other services	690	690	690	0	0
Government	5,250	5,340	5,290	-90	-40
Federal government	780	830	820	-50	-40
State government	1,450	1,460	1,480	-10	-30
Local government	3,020	3,050	2,990	-30	30
Local education	1,600	1,620	1,590	-20	10
Labor-management disputes	0	0	0	0	0

## Lake County Current Labor Force and Industry Employment

	Dec. 2013	Nov. 2013	Dec. 2012	Change From Nov. 2013	Change From Dec. 2012
<b>Labor Force Status (Household Data)</b>					
Civilian labor force	3,570	3,583	3,616	-13	-46
Unemployed	357	349	458	8	-101
Unemployment rate	10.0%	9.7%	12.7%	XX	XX
Unemployment rate, seasonally adjusted	10.1%	10.7%	11.9%	XX	XX
Employed	3,213	3,234	3,158	-21	55
<b>Nonfarm Payroll Employment (Establishment Data)</b>					
Total nonfarm payroll employment	2,120	2,140	2,100	-20	20
Total private	1,120	1,110	1,090	10	30
Mining and logging	50	50	40	0	10
Construction	70	70	70	0	0
Manufacturing	240	230	220	10	20
Trade, transportation, and utilities	300	300	330	0	-30
Retail trade	210	200	210	10	0
Information	20	20	20	0	0
Financial activities	50	50	50	0	0
Professional and business services	70	70	70	0	0
Educational and health services	100	100	90	0	10
Leisure and hospitality	170	170	160	0	10
Other services	50	50	40	0	10
Government	1,000	1,030	1,010	-30	-10
Federal government	210	230	230	-20	-20
State government	180	180	170	0	10
Local government	610	620	610	-10	0
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. "Natural resources" includes only Logging (NAICS 1133).



**February 2014**

## Economic Indicators

### Unemployment Rates

	Raw	Seasonally Adjusted
<b>Douglas</b>		
November 2013	9.7%	10.3%
December 2013	9.8%	10.0%
<b>Oregon</b>		
November 2013	6.7%	7.3%
December 2013	6.9%	7.0%
<b>United States</b>		
November 2013	6.6%	7.0%
December 2013	6.5%	6.7%

### Nonfarm Payroll Employment

December 2013

	Employment	Annual Change
Total	34,670	310
Goods Producing	6,370	30
Mining and Log.	1,060	50
Wood Prod. Mfg.	2,860	-30
Other Mfg.	1,430	20
Construction	1,020	-10
Service Producing	20,350	380
Retail	4,260	60
Financial Activities	1,260	-90
Leisure and Hosp.	3,030	100
Additional Serv.	11,800	310
Government	7,950	-100

### Consumer Price Index (CPI)

1982-1984 = 100

All Urban Consumers

#### United States

December 2013	233.049
Year change	1.5%

#### Portland-Salem MSA

Jan. – June 2013	233.735
Year Change	2.2%
July – Dec. 2013 available Feb. 20, 2014	

<http://www.bls.gov/cpi>

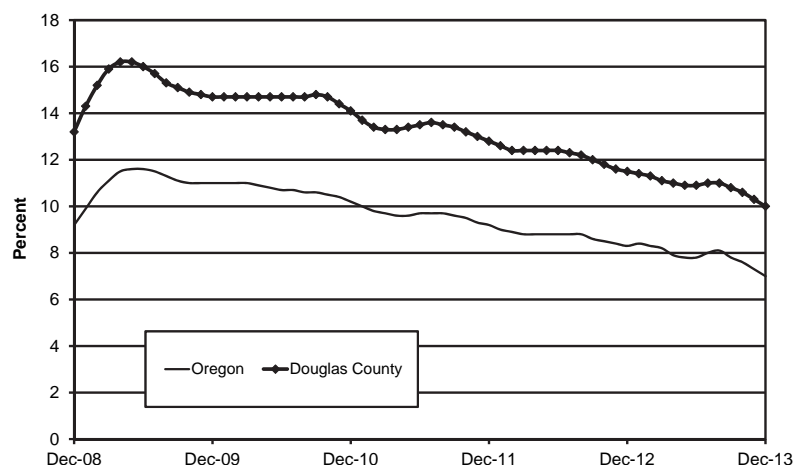
## Latest Local Area Employment Data

Douglas County's unemployment rate dropped to 10.0 percent in December compared with a revised 10.3 percent in November. The rate this December was 1.5 percentage points lower than the 11.5 percent recorded in December of last year. Douglas County was tied with Klamath County for the fifth highest seasonally adjusted county unemployment rate in the state. The number of unemployed rose by 47 in December and was 818 lower than December 2012 at 4,230.

### Nonfarm Payroll Employment

In December, total nonfarm payroll employment dropped by 100 when a decrease of 110 was expected on a seasonal basis (a seasonally adjusted increase of 10). Total nonfarm employment rose by 310, or 0.9 percent, compared with December 2012.

### Seasonally Adjusted Unemployment Rates



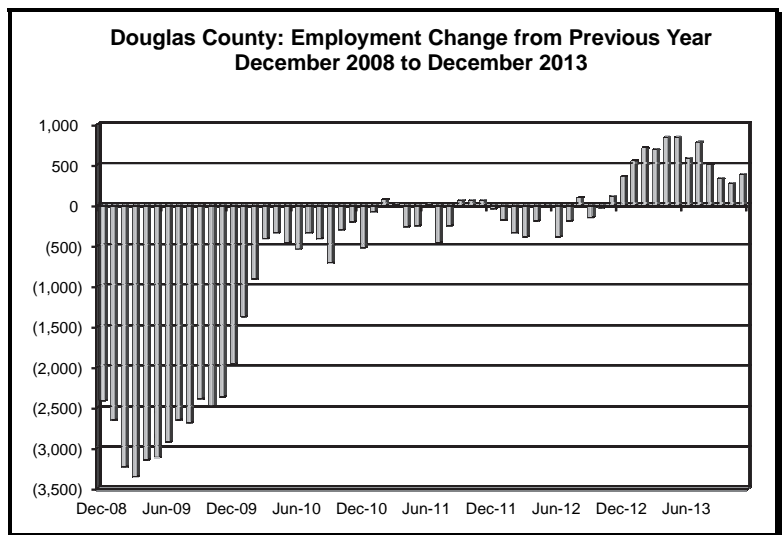
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Overall, manufacturing increased by 70 in December due to an increase of 30 in wood products and an additional increase of 40 in other durable goods.

In the private nonmanufacturing sectors in December, there were seasonal decreases in construction (-30) and leisure and hospitality (-60). Elsewhere, there were gains in transportation, warehousing, and utilities (+20), information (+10), financial activities (+20), professional and business services (+30), and private educational and health services (+20). There were losses in mining and logging (-20), retail trade (-20), and other services (-10).

Government decreased by 130 due to decreases in local education (-120), tribal government (-10), and federal government (-10). These losses were countered by a gain of 10 in non-education local government.



## Around the County

**Roseburg Forest Products** is salvaging trees on company land that burned in last year's **Douglas Complex Fire**. As of late December, it had logged eight million board feet and plans to log an additional 32 million board feet in the next 18 months. *The News-Review*, 12/29/2013

**Ta Ta's New Days**, a thrift store, opened in **Roseburg**. *The News-Review*, 12/30/2013

**Roseburg Urgent Care** opened in **Roseburg**. It employs five doctors, a nurse practitioner, a physician assistant, several nurses, and other staff. *The News-Review*, 1/6/2014

**Sutherlin High School** will receive a \$309,533 grant from the Oregon Department of Education for career and technical courses. It will use the money to buy equipment for agriculture, welding, information technology, and wood shop classes. *The News-Review*, 1/9/2014

**Roseburg Donut & Bagel Factory** opened in **Roseburg**. *The News-Review*, 1/13/2014

**Skipper's Seafood & Chowder House** in **Roseburg** closed. It employed six people. *The News-Review*, 1/13/2014

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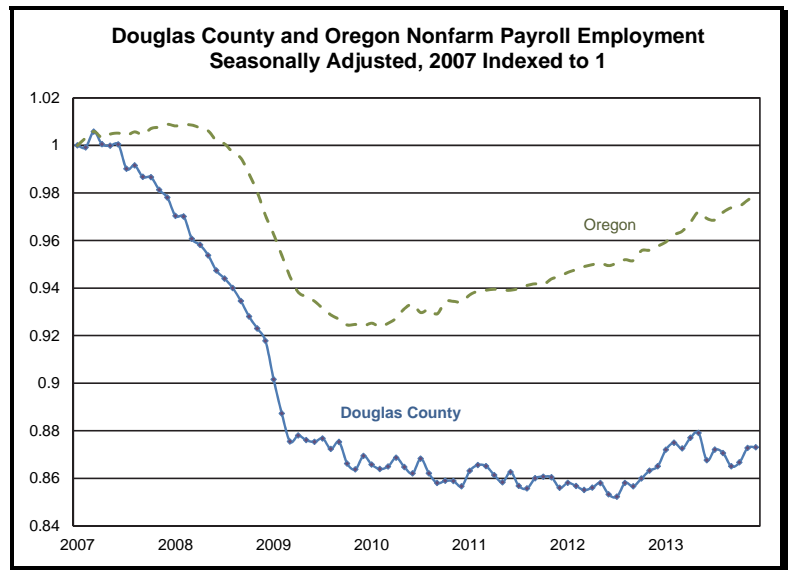
**Umpqua Community College** has announced its UCC Scholars program for students who graduate from a high school in the UCC district with a cumulative GPA of at least 3.5. Starting in the fall of 2014, students can receive tuition waivers for up to six terms for maintaining good grades and doing community service work. *The News-Review*, 1/17/2014

**Sandy's Place** opened in **Canyonville**. It offers gifts, toys, and home and party decorations. *The News-Review*, 1/27/2014

## How Much has Douglas County Recovered From the Recession?

Recently, a customer asked how much employment has recovered in Douglas County since the recession. I answered the question using seasonally adjusted Douglas County and statewide nonfarm payroll employment data to produce the accompanying graph. It shows Douglas County and Oregon employment indexed to 2007 to make a relative comparison.

Douglas County entered the recession sooner and it was relatively more severe than the statewide recession. Although the worst of the recession ended in Douglas County about the same time as it did statewide, employment continued to drift downward for several years before turning up. Statewide, employment began to turn up shortly after the recession ended. This is indicative of the lag in the housing market recovery and its effect on wood products, still a major industry in Douglas County. Statewide employment was pulled along by the Portland area's more diverse economy.



In absolute terms, Douglas County employment peaked at 39,950 in July 2006 and then hit bottom in July 2012 at 33,800, a loss of 6,150, or 15 percent. The county hit a recent peak of 34,864 in May of 2013, which means it had recovered 1,064 jobs, or 17 percent of the employment lost in the recession.

In contrast, statewide employment reached its peak in December 2007 at 1,738,100 and then declined to 1,591,500 in February 2010, a loss of 146,600, or eight percent. As of December 2013 Oregon had reached 1,687,500, meaning it had recovered 96,000 jobs, or 65 percent, of the employment lost in the recession.

## Douglas County Payroll Trends

A data request by a customer in 2012 about total private sector payroll in selected cities has been updated in the following table for Douglas County. The data are from employers covered by unemployment insurance laws and include over 90 percent of firms in the state. Although the data is

**Total Private Sector Payroll for Douglas County and Roseburg City Limits**

	2006	2007	2008	2009	2010	2011	2012
Douglas County	\$943,812,763	\$938,181,377	\$900,795,944	\$816,508,624	\$826,041,851	\$847,682,615	\$877,329,115
Roseburg	\$428,301,285	\$439,848,841	\$457,681,480	\$427,946,201	\$403,390,631	\$409,129,818	\$426,944,312

not designed to be used as a time series, large changes in recent years can give a broad indication of economic trends.

The data show that payrolls grew in Roseburg leading up to the Great Recession, which began in late 2007 and was over by early 2010. In contrast, the county overall was already losing payroll. This is likely due to the high proportion of payroll in the wood products industry in areas outside Roseburg. One of the first industries to be negatively affected by the recession was new housing construction. As a result, wood products saw demand drop early on leading to employment and payroll declines.

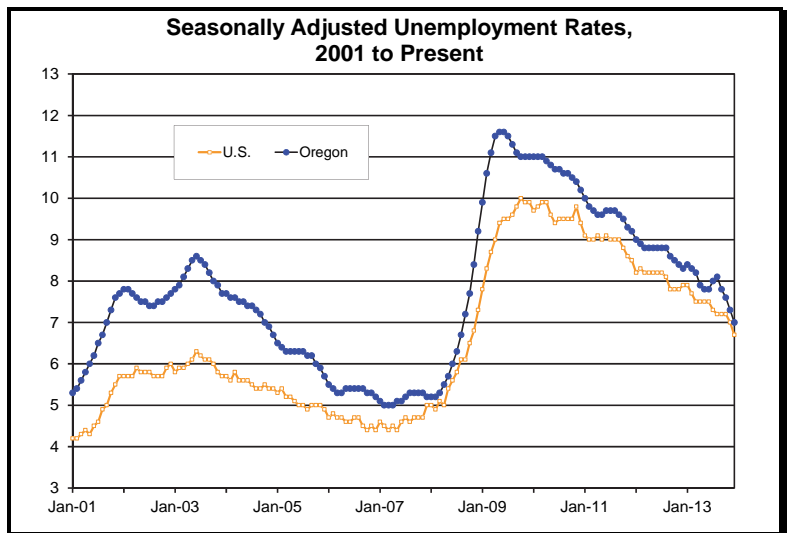
Both the county and the City of Roseburg had large total payroll losses during the recession with the county losing about 75 million (8.3%) and Roseburg losing \$76 million (11.7%).

Both the county and Roseburg have seen payrolls grow for the past two years, but have yet to reach their pre-recession peaks.

## Oregon Employment

Oregon's seasonally adjusted unemployment rate dropped to 7.0 percent in December from 7.3 percent in November. December marked Oregon's lowest unemployment rate since August 2008, when the rate was 6.7 percent.

In December, Oregon's unemployment rate fell as more people were able to find jobs and there were fewer unemployed. There were nearly 132,000 Oregonians unemployed compared with approximately 160,000 a year earlier. This drop of more than 28,000 individuals since December 2012 was good news for many families in the state and for many sectors of Oregon's economy.



Oregon's job growth in 2013 was much stronger than in the prior two years. In 2013, 37,700 jobs were added, compared with 22,000 in 2012 and 18,400 in 2011.

In recent months, the pace of expansion has accelerated. Seasonally adjusted payroll employment rose 4,400 in December, following a revised gain of 4,300 in November. Monthly gains have been the norm for some time now, with gains occurring in 13 of the past 15 months.



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Job gains in December were concentrated in three of the 11 major industries: professional and business services (+1,600 jobs), government (+1,200) and other services (+900).

## **National Employment**

The unemployment rate declined from 7.0 percent to 6.7 percent in December, while total nonfarm payroll employment edged up (+74,000), the U.S. Bureau of Labor Statistics reported. Employment rose in retail trade and wholesale trade but was down in information.

The number of unemployed persons declined by 490,000 to 10.4 million in December, and the unemployment rate declined by 0.3 percentage point to 6.7 percent. Over the year, the number of unemployed persons and the unemployment rate were down by 1.9 million and 1.2 percentage points, respectively.

Total nonfarm payroll employment edged up in December (+74,000). In 2013, job growth averaged 182,000 per month, about the same as in 2012 (+183,000 per month). In December, job gains occurred in retail trade and wholesale trade, while employment declined in information.

**DOUGLAS COUNTY LABOR FORCE SUMMARY\***  
(by place of residence)

	Dec. 2013	Nov. 2013	Dec. 2012	-Change from-	
				Nov. 2013	Dec. 2012
Civilian Labor Force	43,063	43,309	44,431	-246	-1,368
Unemployment	4,230	4,183	5,048	47	-818
Unemployment rate	9.8%	9.7%	11.4%	0.1	-1.6
Unemployment rate, seasonally adjusted	10.0%	10.3%	11.5%	-0.3	-1.5
Total Employment	38,833	39,126	39,383	-293	-550

**DOUGLAS COUNTY NONFARM PAYROLL EMPLOYMENT**  
(by place of work)

	Dec. 2013	Nov. 2013	Dec. 2012	-Change from-	
				Nov. 2013	Dec. 2012
TOTAL NONFARM PAYROLL EMPLOYMENT	34,670	34,770	34,360	-100	310
TOTAL PRIVATE	26,720	26,690	26,310	30	410
Mining and Logging	1,060	1,080	1,010	-20	50
Construction	1,020	1,050	1,030	-30	-10
Manufacturing	4,290	4,220	4,300	70	-10
Durable Goods	3,940	3,870	3,960	70	-20
Wood Product Manufacturing	2,860	2,830	2,890	30	-30
Nondurable Goods	350	350	340	0	10
Trade, Transportation, and Utilities	6,500	6,500	6,390	0	110
Wholesale Trade	570	570	550	0	20
Retail Trade	4,260	4,280	4,200	-20	60
Food and Beverage Stores	940	960	990	-20	-50
General Merchandise Stores	1,260	1,250	1,230	10	30
Transportation, Warehousing, and Utilities	1,670	1,650	1,640	20	30
Information	270	260	290	10	-20
Financial Activities	1,260	1,240	1,350	20	-90
Professional and Business Services	3,600	3,570	3,410	30	190
Educational and Health Services	4,600	4,580	4,530	20	70
Leisure and Hospitality	3,030	3,090	2,930	-60	100
Food Services and Drinking Places	2,440	2,460	2,350	-20	90
Other Services	1,090	1,100	1,070	-10	20
Government	7,950	8,080	8,050	-130	-100
Federal Government	1,360	1,370	1,320	-10	40
State Government	1,010	1,010	1,030	0	-20
Local Government	5,580	5,700	5,700	-120	-120
Local Government Tribal	1,170	1,180	1,170	-10	0
Local Education	2,680	2,800	2,800	-120	-120
Local Government, excluding Education and Tribal	1,730	1,720	1,730	10	0
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.

**February 2014**

## Economic Indicators

### Unemployment Rates December 2013

Baker County	8.9%
<i>seasonally adjusted</i>	8.8%
Grant County	11.2%
<i>seasonally adjusted</i>	10.7%
Harney County	11.9%
<i>seasonally adjusted</i>	11.6%
Malheur County	8.0%
<i>seasonally adjusted</i>	8.2%
Union County	7.6%
<i>seasonally adjusted</i>	7.6%
Wallowa County	10.1%
<i>seasonally adjusted</i>	9.6%
Oregon	6.9%
<i>seasonally adjusted</i>	7.0%
United States	6.5%
<i>seasonally adjusted</i>	6.7%

### Population – July 1, 2013

Baker County	16,280
Grant County	7,435
Harney County	7,260
Malheur County	31,440
Union County	26,325
Wallowa County	7,045
Oregon	3,919,020

Source: Population Research Center,  
 Portland State University

### Average Pay Per Job – 2012

Baker County	\$31,186
Grant County	\$33,637
Harney County	\$32,148
Malheur County	\$31,145
Union County	\$33,035
Wallowa County	\$29,684
Oregon	\$44,229
United States	\$49,289

We're publishing this month's edition of *Eastern Oregon Labor Trends* in an abbreviated format, as is customary following our release of December's preliminary employment and unemployment statistics. Between the release of December data for one year and January data for the next year, industry employment statistics undergo an established annual review process. During this thorough review, known as "benchmarking," we replace previous employment estimates that were based on a sample of employers with upgraded figures grounded on more-complete information from almost all Oregon employers.

This process assures that the long-term employment trends we report for Eastern Oregon and the rest of the state accurately reflect what really happened. Next month's release of employment statistics will incorporate these annual revisions.

And now for something completely unscientific.

This office receives a monthly summary of all employers newly registered with the Oregon Employment Department that have an Eastern Oregon or Idaho address. The agency generates these reports primarily for tax purposes, but a few years ago your author reckoned it might be worth tracking the contents of these reports for any potential trends.

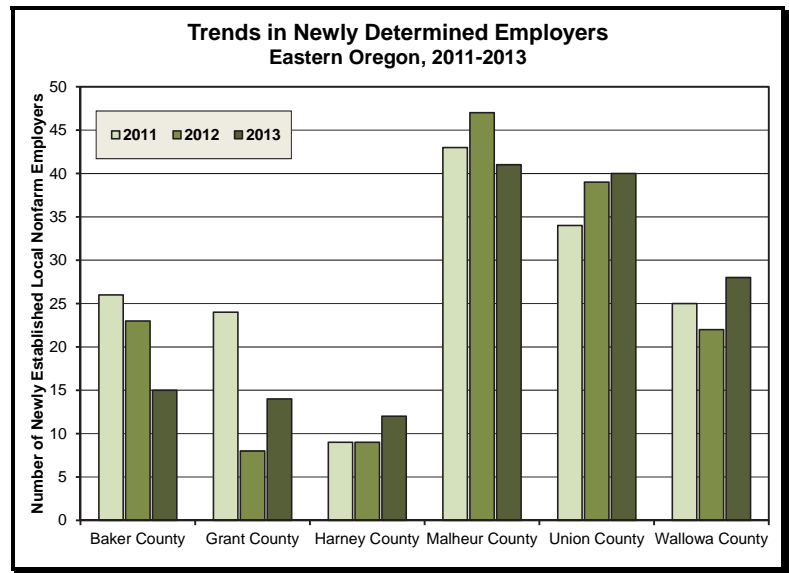
So, beginning in late 2010, we logged the number of newly determined nonfarm employers in those monthly summaries from each Eastern Oregon county. Domestic household employers as well as new employers that were simply successors to existing businesses were excluded.

What was left was thought to be a proxy for the number of genuinely new, locally based nonfarm employers. Graph 1 on the next page shows how the number of such new establishments varied from 2011 to 2013 in this region.

For what it's worth, the trends depicted here are perhaps most encouraging for Union County and most discouraging for Baker County.

But please don't read too much into these trends. For example, an auto parts store recently opened in Baker City. Even though that new establishment is adding to commerce in Baker County, it's not counted in Graph 1 because the store is part of a national chain that was already doing business in Oregon. It wasn't a newly established, locally based business, which is what Graph 1 tries to measure.

Typically, the employers captured by Graph 1's columns are very small businesses. Graph 1 isn't the final word – and not even close to the most important word – in this region's economic story. It's merely one minor but hopefully interesting piece of a much larger puzzle.



Graph 1

## **NATIONAL EMPLOYMENT SITUATION – DECEMBER 2013**

The number of unemployed persons declined by a seasonally adjusted 490,000 to 10.4 million in December, and the seasonally adjusted unemployment rate declined by 0.3 percentage point to 6.7 percent. Over the year, the number of unemployed persons and the unemployment rate were down by 1.9 million and 1.2 percentage points, respectively.

Total nonfarm payroll employment edged up in December (+74,000, seasonally adjusted). In 2013, job growth averaged 182,000 per month, about the same as in 2012 (+183,000 per month).

## **OREGON EMPLOYMENT SITUATION – DECEMBER 2013**

Oregon's seasonally adjusted unemployment rate dropped to 7.0 percent in December from 7.3 percent in November. December marked Oregon's lowest unemployment rate since August 2008, when the rate was 6.7 percent.

Oregon's job growth in 2013 was much stronger than in the prior two years. In 2013, 37,700 jobs were added, compared with 22,000 in 2012 and 18,400 in 2011.

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## BAKER COUNTY

Baker County had an estimated December 2013 jobless rate of 8.9 percent, up slightly from November's 8.1 percent. December's labor force estimates show 6,323 employed and 617 unemployed local residents.

Baker County's annual average unemployment rate for 2013 was 9.2 percent. That's a preliminary figure and still subject to revision. In fact, we're working on that revision effort right now.

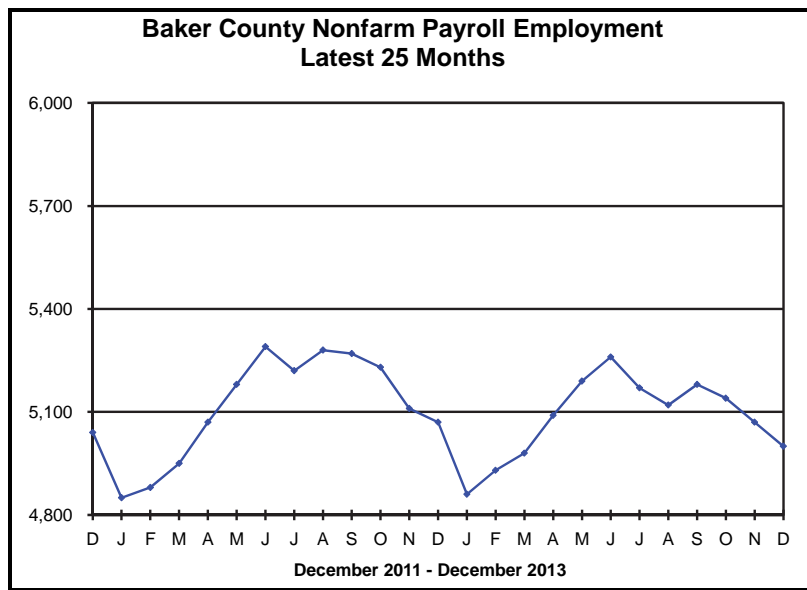
### BAKER COUNTY CURRENT LABOR FORCE AND INDUSTRY EMPLOYMENT

	Dec.	Nov.	Dec.	Change From	
	2013	2013	2012	Nov. 2013	Dec. 2012
<b>Labor Force Status</b> (Household Data)					
Civilian labor force	6,940	7,005	7,282	-65	-342
Unemployed	617	568	717	49	-100
Unemployment rate	8.9	8.1	9.8	0.8	-0.9
Unemployment rate (seasonally adjusted)	8.8	9.2	9.4	-0.4	-0.6
Employed	6,323	6,437	6,565	-114	-242
<b>Nonfarm Payroll Employment</b> (Establishment Data)					
Total nonfarm payroll employment	5,000	5,070	5,070	-70	-70
Total private	3,800	3,850	3,860	-50	-60
Mining and logging	10	10	20	0	-10
Construction	180	210	180	-30	0
Manufacturing	470	460	500	10	-30
Trade, transportation, and utilities	1,030	1,030	1,020	0	10
Wholesale trade	80	80	80	0	0
Retail trade	720	720	710	0	10
Transportation, warehousing, and utilities	230	230	230	0	0
Information	70	70	70	0	0
Financial activities	170	170	180	0	-10
Professional and business services	300	300	320	0	-20
Educational and health services	840	820	820	20	20
Leisure and hospitality	520	560	540	-40	-20
Other services	210	220	210	-10	0
Government	1,200	1,220	1,210	-20	-10
Federal government	200	210	200	-10	0
State government	260	260	270	0	-10
Local government	740	750	740	-10	0
Labor-management disputes	0	0	0	0	0

The most recent month is preliminary; the prior month is revised.

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. Prepared in cooperation with the U.S. Department of Labor, Bureau of Labor Statistics.

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.



## GRANT COUNTY

Grant County had an estimated December 2013 jobless rate of 11.2 percent, up moderately from November's 9.8 percent. December's labor force estimates show 2,912 employed and 369 unemployed local residents.

Grant County's annual average unemployment rate for 2013 was 12.0 percent. That's a preliminary figure and still subject to revision. In fact, we're working on that revision effort right now.

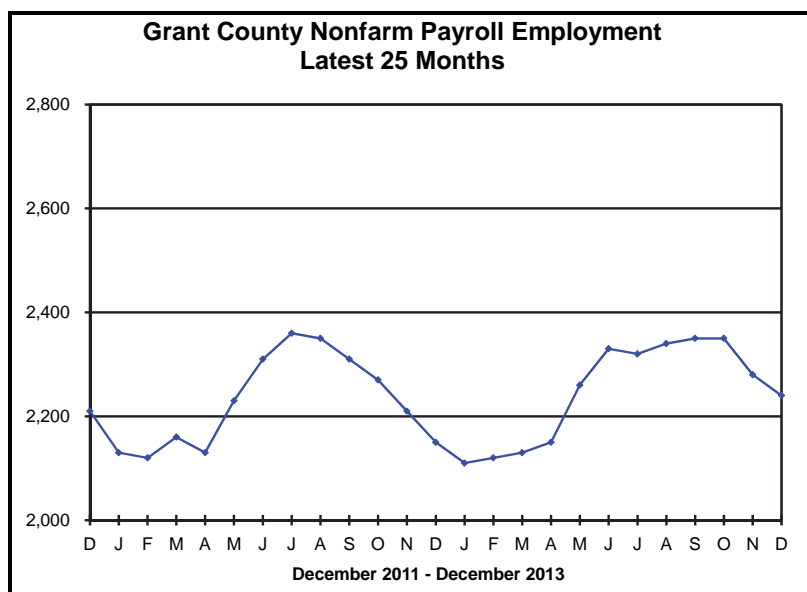
### GRANT COUNTY CURRENT LABOR FORCE AND INDUSTRY EMPLOYMENT

	Change From				
	Dec. 2013	Nov. 2013	Dec. 2012	Nov. 2013	Dec. 2012
<b>Labor Force Status (Household Data)</b>					
Civilian labor force	3,281	3,297	3,325	-16	-44
Unemployed	369	324	486	45	-117
Unemployment rate	11.2	9.8	14.6	1.4	-3.4
Unemployment rate (seasonally adjusted)	10.7	11.8	13.0	-1.1	-2.3
Employed	2,912	2,973	2,839	-61	73
<b>Nonfarm Payroll Employment (Establishment Data)</b>					
Total nonfarm payroll employment	2,240	2,280	2,150	-40	90
Total private	1,250	1,250	1,190	0	60
Mining and logging	80	80	80	0	0
Construction	60	60	60	0	0
Manufacturing	160	150	130	10	30
Trade, transportation, and utilities	320	310	310	10	10
Wholesale trade	30	30	30	0	0
Retail trade	240	230	230	10	10
Transportation, warehousing, and utilities	50	50	50	0	0
Information	40	40	40	0	0
Financial activities	80	80	80	0	0
Professional and business services	110	120	110	-10	0
Educational and health services	170	170	150	0	20
Leisure and hospitality	170	180	170	-10	0
Other services	60	60	60	0	0
Government	990	1,030	960	-40	30
Federal government	230	270	200	-40	30
State government	150	150	130	0	20
Local government	610	610	630	0	-20
Labor-management disputes	0	0	0	0	0

The most recent month is preliminary; the prior month is revised.

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. Prepared in cooperation with the U.S. Department of Labor, Bureau of Labor Statistics.

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.



## HARNEY COUNTY

Harney County had an estimated December 2013 jobless rate of 11.9 percent, up moderately from November's revised 10.3 percent. December's labor force estimates show 2,731 employed and 370 unemployed local residents.

Harney County's annual average unemployment rate for 2013 was 12.4 percent. That's a preliminary figure and still subject to revision. In fact, we're working on that revision effort right now.

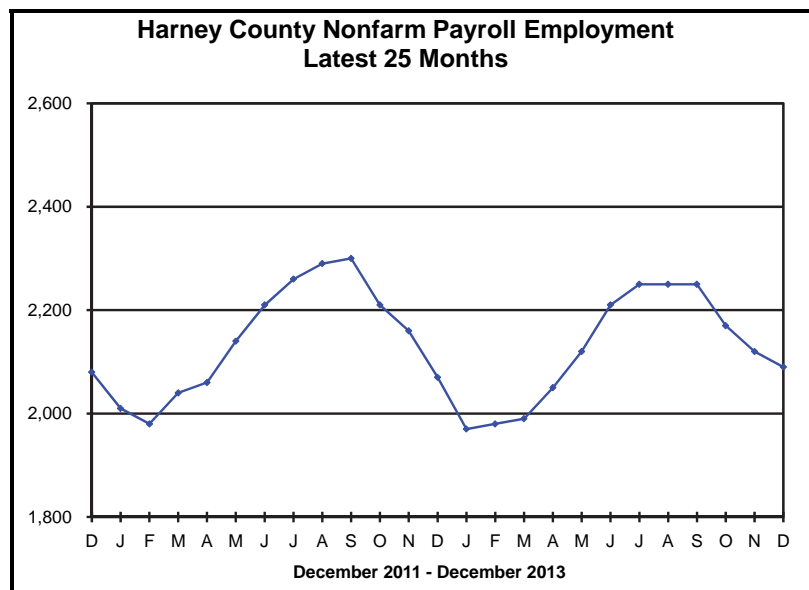
### HARNEY COUNTY CURRENT LABOR FORCE AND INDUSTRY EMPLOYMENT

	Dec. 2013	Nov. 2013	Dec. 2012	Change From	
				Nov. 2013	Dec. 2012
<b>Labor Force Status (Household Data)</b>					
Civilian labor force	3,101	3,091	3,185	10	-84
Unemployed	370	317	406	53	-36
Unemployment rate	11.9	10.3	12.7	1.6	-0.8
Unemployment rate (seasonally adjusted)	11.6	11.9	12.1	-0.3	-0.5
Employed	2,731	2,774	2,779	-43	-48
<b>Nonfarm Payroll Employment (Establishment Data)</b>					
Total nonfarm payroll employment	2,090	2,120	2,070	-30	20
Total private	1,030	1,080	1,030	-50	0
Mining, logging, and construction	70	80	80	-10	-10
Manufacturing	10	10	10	0	0
Trade, transportation, and utilities	380	380	360	0	20
Wholesale trade	30	30	30	0	0
Retail trade	280	280	270	0	10
Transportation, warehousing, and utilities	70	70	60	0	10
Information	10	10	20	0	-10
Financial activities	70	70	70	0	0
Professional and business services	80	90	80	-10	0
Educational and health services	170	170	170	0	0
Leisure and hospitality	200	230	190	-30	10
Other services	40	40	50	0	-10
Government	1,060	1,040	1,040	20	20
Federal government	240	230	240	10	0
State government	150	150	150	0	0
Local government	670	660	650	10	20
Labor-management disputes	0	0	0	0	0

The most recent month is preliminary; the prior month is revised.

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. Prepared in cooperation with the U.S. Department of Labor, Bureau of Labor Statistics.

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.



## MALHEUR COUNTY

Malheur County had an estimated December 2013 jobless rate of 8.0 percent, up slightly from November's 7.2 percent. December's labor force estimates show 11,651 employed and 1,011 unemployed local residents.

Malheur County's annual average unemployment rate for 2013 was 8.8 percent. That's a preliminary figure and still subject to revision. In fact, we're working on that revision effort right now.

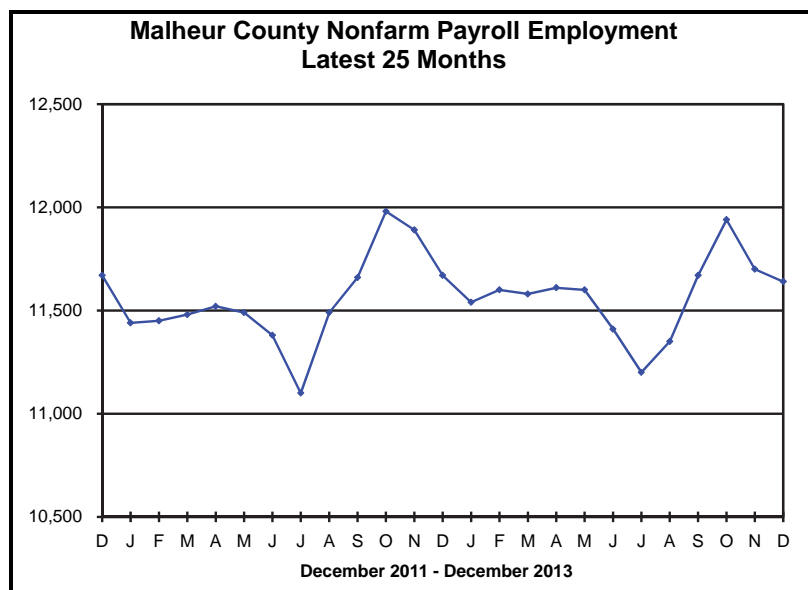
### MALHEUR COUNTY CURRENT LABOR FORCE AND INDUSTRY EMPLOYMENT

	Dec. 2013		Nov. 2013		Dec. 2012		Change From	
	Dec. 2013	Nov. 2013	Dec. 2012	Nov. 2012	Dec. 2012	Nov. 2013	Dec. 2012	
<b>Labor Force Status (Household Data)</b>								
Civilian labor force	12,662	12,848	12,943	-186	-281			
Unemployed	1,011	924	1,298	87	-287			
Unemployment rate	8.0	7.2	10.0	0.8	-2.0			
<i>Unemployment rate (seasonally adjusted)</i>	8.2	8.5	9.6	-0.3	-1.4			
Employed	11,651	11,924	11,645	-273	6			
<b>Nonfarm Payroll Employment (Establishment Data)</b>								
Total nonfarm payroll employment	11,640	11,700	11,670	-60	-30			
Total private	8,200	8,270	8,240	-70	-40			
Mining, logging, and construction	300	310	290	-10	10			
Manufacturing	860	870	950	-10	-90			
Trade, transportation, and utilities	3,020	3,040	3,070	-20	-50			
Wholesale trade	770	780	780	-10	-10			
Retail trade	1,840	1,840	1,870	0	-30			
Transportation, warehousing, and utilities	410	420	420	-10	-10			
Information	200	190	170	10	30			
Financial activities	340	350	340	-10	0			
Professional and business services	400	410	480	-10	-80			
Educational and health services	1,670	1,690	1,630	-20	40			
Leisure and hospitality	1,120	1,130	1,040	-10	80			
Other services	290	280	270	10	20			
Government	3,440	3,430	3,430	10	10			
Federal government	210	200	220	10	-10			
State government	1,230	1,230	1,210	0	20			
Local government	2,000	2,000	2,000	0	0			
Labor-management disputes	0	0	0	0	0			

The most recent month is preliminary; the prior month is revised.

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. Prepared in cooperation with the U.S. Department of Labor, Bureau of Labor Statistics.

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.





## UNION COUNTY

Union County had an estimated December 2013 jobless rate of 7.6 percent, up slightly from November's 7.0 percent. December's labor force estimates show 11,034 employed and 906 unemployed local residents.

Union County's annual average unemployment rate for 2013 was 8.2 percent. That's a preliminary figure and still subject to revision. In fact, we're working on that revision effort right now.

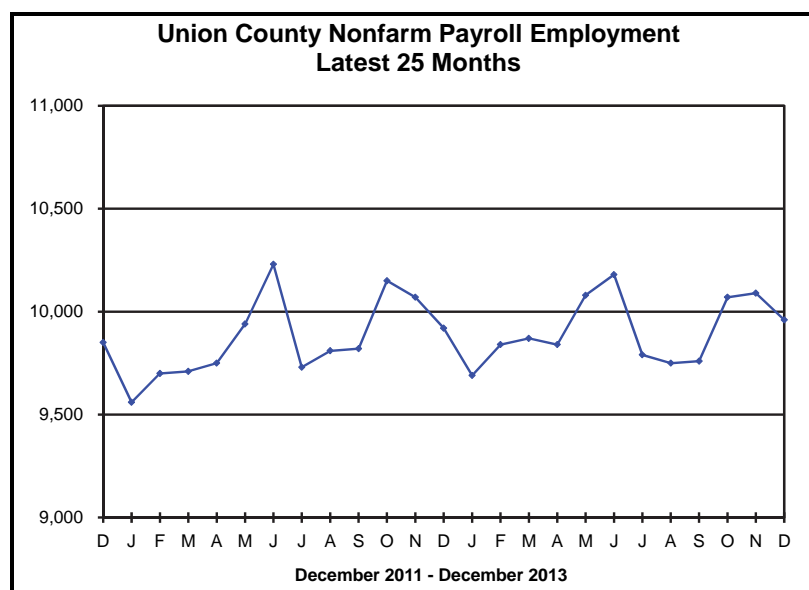
### UNION COUNTY CURRENT LABOR FORCE AND INDUSTRY EMPLOYMENT

	Dec.	Nov.	Dec.	Change From	
	2013	2013	2012	Nov. 2013	Dec. 2012
<b>Labor Force Status (Household Data)</b>					
Civilian labor force	11,940	12,072	12,209	-132	-269
Unemployed	906	851	1,074	55	-168
Unemployment rate	7.6	7.0	8.8	0.6	-1.2
<i>Unemployment rate (seasonally adjusted)</i>	7.6	7.9	8.8	-0.3	-1.2
Employed	11,034	11,221	11,135	-187	-101
<b>Nonfarm Payroll Employment (Establishment Data)</b>					
Total nonfarm payroll employment	9,960	10,090	9,920	-130	40
Total private	7,280	7,310	7,280	-30	0
Mining and logging	50	60	80	-10	-30
Construction	380	410	410	-30	-30
Manufacturing	1,190	1,190	1,130	0	60
Trade, transportation, and utilities	2,130	2,140	2,090	-10	40
Wholesale trade	260	260	280	0	-20
Retail trade	1,420	1,430	1,370	-10	50
Transportation, warehousing, and utilities	450	450	440	0	10
Information	110	110	120	0	-10
Financial activities	330	340	340	-10	-10
Professional and business services	390	400	410	-10	-20
Educational and health services	1,530	1,520	1,550	10	-20
Leisure and hospitality	890	860	870	30	20
Other services	280	280	280	0	0
Government	2,680	2,780	2,640	-100	40
Federal government	180	200	180	-20	0
State government	1,380	1,400	1,340	-20	40
Local government	1,120	1,180	1,120	-60	0
Labor-management disputes	0	0	0	0	0

The most recent month is preliminary; the prior month is revised.

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. Prepared in cooperation with the U.S. Department of Labor, Bureau of Labor Statistics.

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.



## WALLOWA COUNTY

Wallowa County had an estimated December 2013 jobless rate of 10.1 percent, up moderately from November's revised 8.9 percent. December's labor force estimates show 3,094 employed and 347 unemployed local residents.

Wallowa County's annual average unemployment rate for 2013 was 9.9 percent. That's a preliminary figure and still subject to revision. In fact, we're working on that revision effort right now.

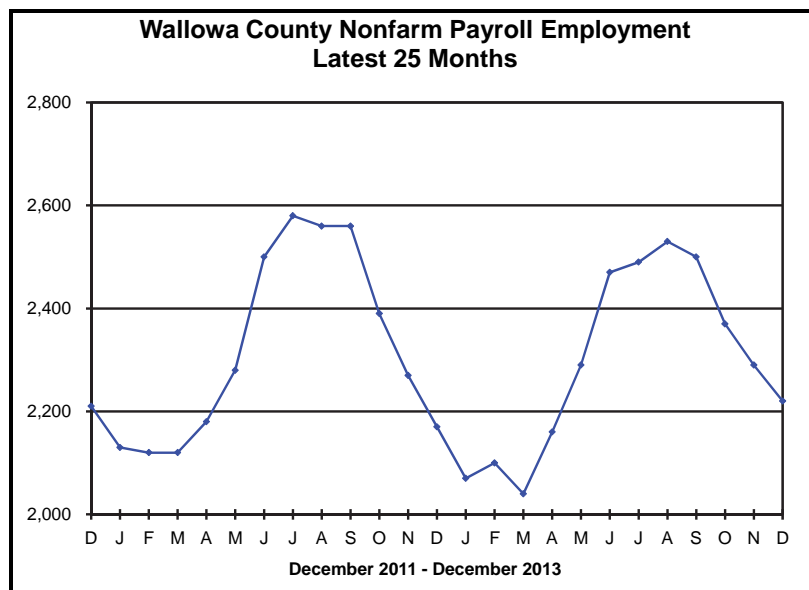
### WALLOWA COUNTY CURRENT LABOR FORCE AND INDUSTRY EMPLOYMENT

	Dec.	Nov.	Dec.	Change From	
	2013	2013	2012	Nov. 2013	Dec. 2012
<b>Labor Force Status (Household Data)</b>					
Civilian labor force	3,441	3,497	3,553	-56	-112
Unemployed	347	311	418	36	-71
Unemployment rate	10.1	8.9	11.8	1.2	-1.7
Unemployment rate (seasonally adjusted)	9.6	10.1	10.2	-0.5	-0.6
Employed	3,094	3,186	3,135	-92	-41
<b>Nonfarm Payroll Employment (Establishment Data)</b>					
Total nonfarm payroll employment	2,220	2,290	2,170	-70	50
Total private	1,550	1,600	1,490	-50	60
Mining and logging	80	90	70	-10	10
Construction	130	140	120	-10	10
Manufacturing	130	130	140	0	-10
Trade, transportation, and utilities	410	420	390	-10	20
Wholesale and retail trade	310	310	300	0	10
Transportation, warehousing, and utilities	100	110	90	-10	10
Information	10	10	10	0	0
Financial activities	160	160	160	0	0
Professional and business services	100	100	90	0	10
Educational and health services	300	300	260	0	40
Leisure and hospitality	140	160	160	-20	-20
Other services	90	90	90	0	0
Government	670	690	680	-20	-10
Federal government	80	100	80	-20	0
State government	100	110	110	-10	-10
Local government	490	480	490	10	0
Labor-management disputes	0	0	0	0	0

The most recent month is preliminary; the prior month is revised.

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. Prepared in cooperation with the U.S. Department of Labor, Bureau of Labor Statistics.

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.



**February 2014**

## Economic Indicators

### Unemployment Rates

	Raw	Seasonally Adjusted
<b>Lane</b>		
November 2013	6.6%	7.2%
December 2013	6.7%	6.9%
<b>Oregon</b>		
November 2013	6.7%	7.3%
December 2013	6.9%	7.0%
<b>United States</b>		
November 2013	6.6%	7.0%
December 2013	6.5%	6.7%

### Nonfarm Payroll Employment December 2013

	Employment	Annual Change
Total	145,800	1,500
Goods Producing	18,000	-200
Mining and Log	1,000	100
Wood Prod. Mfg.	3,200	-100
Other Mfg.	8,900	0
Construction	4,900	-200
Service Producing	97,300	1,300
Retail	19,500	300
Health Care	18,200	200
Leisure and Hosp.	14,700	300
Additional Serv.	44,900	500
Government	30,500	400

### Consumer Price Index (CPI) 1982-1984 = 100 All Urban Consumers

<b>United States</b>	
December 2013	233.049
Year change	1.5%
<b>Portland-Salem MSA</b>	
Jan. – June 2013	233.735
Year Change	2.2%
July – Dec. 2013 available Feb. 20, 2014	

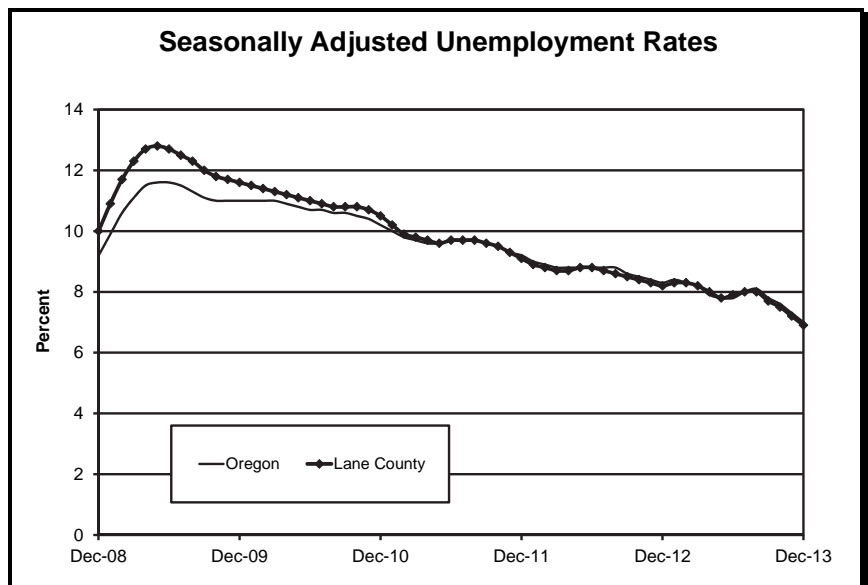
<http://www.bls.gov/cpi>

## Latest Local Area Employment Data

Lane County's seasonally adjusted unemployment rate dropped to 6.9 percent in December compared with a revised 7.2 percent in November. The rate this December is down 1.3 percentage points from the 8.2 percent recorded in December 2012. The unadjusted rate was 6.7 percent. The number of unemployed rose by 229 from November, and was 2,355 lower than December 2012.

### Nonfarm Payroll Employment

Total nonfarm payroll employment dropped by 800 in December when an increase of 70 was expected on a seasonal basis (a seasonally adjusted decrease of 870). Total nonfarm employment rose 1,500 from December of last year for a 1.0 percent increase.



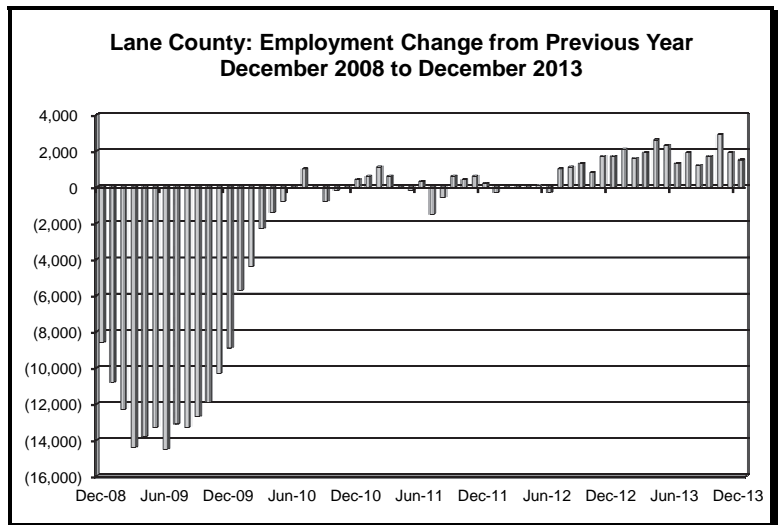
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Manufacturing decreased by 200 due to a decrease of 100 each in wood products and nondurable goods manufacturing.

In the private nonmanufacturing sectors in December, there were seasonal decreases in construction (-400) and leisure and hospitality (-100). Elsewhere, there were gains in professional and business services (+100) and private educational and health services (+200). There was a loss in other services (-100).

Government dropped 300 in December from losses in state government (-100) and local education (-200).



## Around the County

The **Lane County Sheriff's Department** plans to hire 20 jail deputies and several volunteer reserve deputies. *The Register-Guard, 1/1/2014*

The Tomahawk Investment Group LLC plans to buy, renovate, and reopen the **Tomahawk Sports Bar and Grill** in **Marcola**. *The Register-Guard, 1/4/2014*

**Baker Butcher**, a restaurant, opened in the Fifth Street Public Market in downtown **Eugene**. It employs six people. *The Register-Guard, 1/4/2014*

**Pinnacle Propane Express** will open a propane facility in **Goshen**. It will recondition and refill grill tanks for grocery, convenience, and home improvement stores. It hired four workers and plans to add 30 more. *The Register-Guard, 1/5/2014*

**Grocery Outlet** will open in **Cottage Grove** this month. It will employ 27 people. *The Register-Guard, 1/10/2014*

**Soubise** restaurant and **The Bridge Bar and Grill** in **Eugene** closed. *The Register-Guard, 1/15/2014*

**Imagine Group**, a graphics and photography firm in **Eugene**, will close. It employs eight people. *The Register-Guard, 1/18/2014*

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**WildCraft CiderWorks**, a hard cider maker, will open in **Eugene**. It will employ the two owners to start. *The Register-Guard*, 1/19/2014

**Gold Rush Nugget Bucket Inc.** opened in **Eugene**. It manufactures and sells self-contained gold-prospecting kits. *The Register-Guard*, 1/26/2014

**The Oregon State Hospital** replacement project is under construction in **Junction City**. The 211,000-square-foot psychiatric hospital, which is expected to be completed in the spring of 2015, will employ 170 trade workers while under construction and 576 staff when it is fully operational. *The Register-Guard*, 1/28/2014

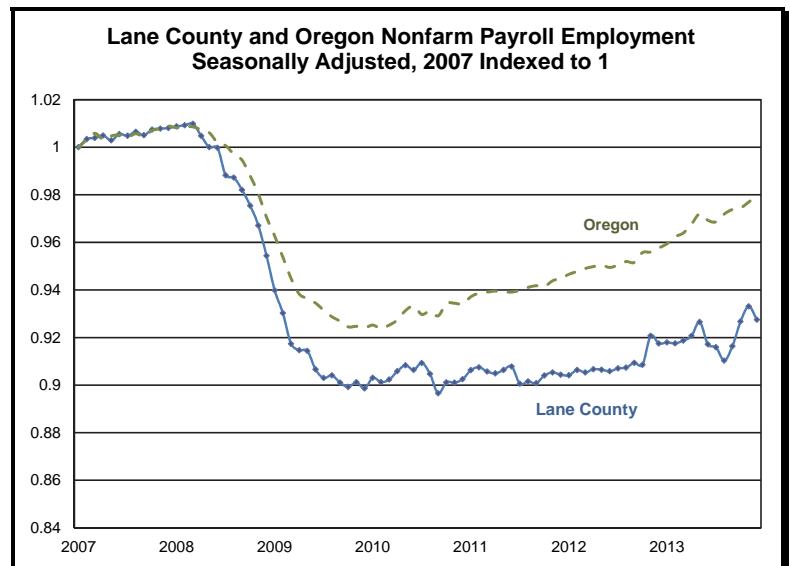
**H&M**, a Sweden-based clothing store, will open at Valley River Center in **Eugene**. It will employ 30 to 40 people. *The Register-Guard*, 1/29/2014

## How Much has Lane County Recovered From the Recession?

Recently, a customer asked how much employment has recovered in Lane County since the recession. I answered the question using seasonally adjusted Lane County and statewide nonfarm payroll employment data to produce the accompanying graph. It shows Douglas County and Oregon employment indexed to 2007 to make a relative comparison.

Lane County entered the recession about the same time as the state but it was relatively more severe than statewide. Although the worst of the recession ended in Lane County about the same time as it did statewide, employment remained at a low level for several years before turning up.

Statewide, employment began to turn up shortly after the recession ended. This is indicative of the losses that Lane County experienced in RV manufacturing, wood products, and high-tech manufacturing that are slow to come back, while the state was pulled along by the Portland area's more diverse economy.



In absolute terms, Lane County employment peaked at 157,520 in March 2008 and then hit bottom in September 2010 at 139,840, a loss of 17,680, or 11 percent. The county hit a recent peak of 145,540 in November of 2013, which means it had recovered 5,700 jobs, or 32 percent, of the employment lost in the recession.

In contrast, statewide employment reached its peak in December 2007 at 1,738,100 and then declined to 1,591,500 in February 2010, a loss of 146,600, or 8 percent. As of December 2013, Oregon had reached 1,687,500, meaning it had recovered 96,000 jobs, or 65 percent, of the employment lost in the recession.

## Lane County Payroll Trends

A data request by a customer in 2012 about total private sector payroll in Lane County and selected cities has been updated in the following table. The data are from employers covered by unemployment insurance laws and include over 90 percent of firms in the state. Although the data is not designed to be used as a time series, large changes in recent years can give a broad indication of economic trends.

Total Private Sector Payroll for Lane County and Select City Limits							
	2006	2007	2008	2009	2010	2011	2012
Lane County	\$4,047,416,991	\$4,237,095,512	\$4,223,495,538	\$3,782,649,000	\$3,776,591,133	\$3,918,345,877	\$4,066,073,186
Coburg	\$98,108,303	\$102,591,516	\$91,710,659	\$42,919,686	\$46,220,389	\$46,038,470	\$48,871,687
Cottage Grove	\$56,958,499	\$57,371,641	\$65,997,238	\$59,686,758	\$50,255,887	\$65,364,824	\$55,184,473
Creswell	\$17,570,769	\$18,633,152	\$20,181,990	\$18,020,733	\$17,575,129	\$17,467,681	\$18,552,707
Eugene	\$2,393,925,762	\$2,498,258,074	\$2,517,961,719	\$2,303,936,022	\$2,264,217,473	\$2,325,012,464	\$2,420,254,752
Florence	\$76,343,104	\$82,230,467	\$81,943,293	\$80,067,648	\$81,834,959	\$84,648,922	\$86,633,930
Junction City	\$98,882,043	\$95,374,538	\$70,439,033	\$46,384,072	\$42,034,349	\$41,285,485	\$45,234,714
Lowell	\$519,480	\$854,702	\$653,469	\$1,418,229	\$645,112	\$1,253,275	\$2,420,048
Oakridge	\$9,236,262	\$9,907,919	\$10,097,463	\$8,877,889	\$8,301,288	\$9,644,635	\$9,543,416
Springfield	\$754,563,539	\$781,310,439	\$795,649,778	\$751,500,358	\$784,838,335	\$829,403,568	\$880,801,193
Veneta	\$10,459,778	\$11,513,777	\$13,813,627	\$12,448,548	\$13,112,464	\$13,732,972	\$13,829,346

The data show that payrolls grew leading up to the “Great Recession”, which began in late 2007 and was over by early 2010. All areas lost payroll during the recessionary period, however, two cities stand out for the severity of their payroll loss. Between 2007 and 2009, Coburg lost about \$60 million, or around 58 percent, of the payroll produced in its city limits. Similarly, Junction City lost around \$53 million, or 56 percent, of its payroll between 2007 and 2010. Aside from the losses in other industries due to the recession, these cities were adversely affected by the loss of employment in the RV manufacturing industry.

Since the recession, most cities have seen total payroll grow. Cottage Grove was the exception, dropping by 16 percent between 2011 and 2012.

The county and most of its cities have not reached their prerecession peaks. The exceptions are Florence, Lowell, Springfield, and Veneta.

## Oregon Employment

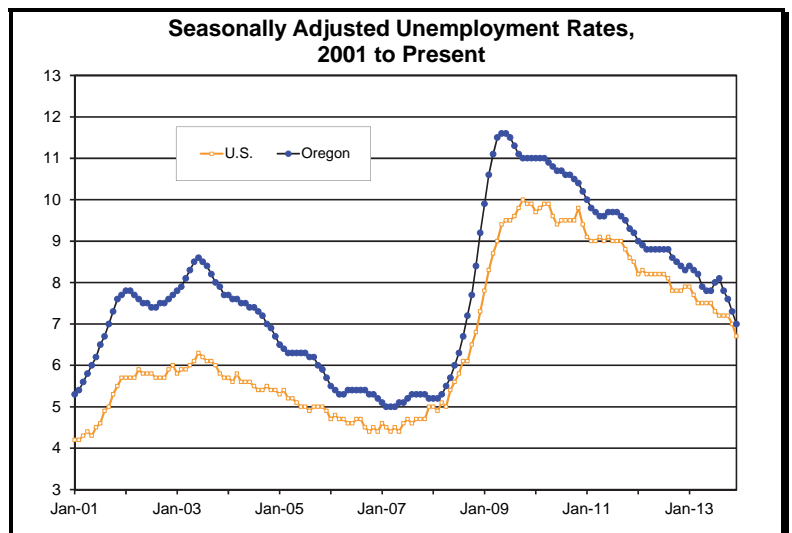
Oregon’s seasonally adjusted unemployment rate dropped to 7.0 percent in December from 7.3 percent in November. December marked Oregon’s lowest unemployment rate since August 2008, when the rate was 6.7 percent.

In December, Oregon’s unemployment rate fell as more people were able to find jobs and there were fewer unemployed. There were nearly 132,000 Oregonians unemployed compared with approximately 160,000 a year earlier. This drop of more than 28,000 individuals since December 2012 was good news for many families in the state and for many sectors of Oregon’s economy.

Oregon's job growth in 2013 was much stronger than in the prior two years. In 2013, 37,700 jobs were added, compared with 22,000 in 2012 and 18,400 in 2011.

In recent months, the pace of expansion has accelerated. Seasonally adjusted payroll employment rose 4,400 in December, following a revised gain of 4,300 in November. Monthly gains have been the norm for some time now, with gains occurring in 13 of the past 15 months.

Job gains in December were concentrated in three of the 11 major industries: professional and business services (+1,600 jobs), government (+1,200) and other services (+900).



## National Employment

The unemployment rate declined from 7.0 percent to 6.7 percent in December, while total nonfarm payroll employment edged up (+74,000), the U.S. Bureau of Labor Statistics reported. Employment rose in retail trade and wholesale trade but was down in information.

The number of unemployed persons declined by 490,000 to 10.4 million in December, and the unemployment rate declined by 0.3 percentage point to 6.7 percent. Over the year, the number of unemployed persons and the unemployment rate were down by 1.9 million and 1.2 percentage points, respectively.

Total nonfarm payroll employment edged up in December (+74,000). In 2013, job growth averaged 182,000 per month, about the same as in 2012 (+183,000 per month). In December, job gains occurred in retail trade and wholesale trade, while employment declined in information.

**EUGENE MSA (Lane County) LABOR FORCE SUMMARY**  
(by place of residence)

	Dec. 2013	Nov. 2013	Dec. 2012	-fchange from- Nov. 2013	Dec. 2012
Civilian Labor Force	171,484	172,528	175,947	-1,044	-4,463
Unemployment	11,573	11,344	13,928	229	-2,355
Unemployment rate	6.7%	6.6%	7.9%	0.1	-1.2
Unemployment rate, seasonally adjusted	6.9%	7.2%	8.2%	-0.3	-1.3
Total Employment	159,911	161,184	162,019	-1,273	-2,108

**EUGENE MSA (Lane County) NONFARM PAYROLL EMPLOYMENT**  
(by place of work)

	Dec. 2013	Nov. 2013	Dec. 2012	-Change from- Nov. 2013	Dec. 2012
TOTAL NONFARM PAYROLL EMPLOYMENT	145,800	146,600	144,300	-800	1,500
TOTAL PRIVATE	115,300	115,800	114,200	-500	1,100
Mining and Logging	1,000	1,000	900	0	100
Construction	4,900	5,300	5,100	-400	-200
Manufacturing	12,100	12,300	12,200	-200	-100
Durable Goods	8,300	8,400	8,400	-100	-100
Wood Product Manufacturing	3,200	3,300	3,300	-100	-100
Transportation Equipment Manufacturing	500	500	500	0	0
Nondurable goods	3,800	3,900	3,800	-100	0
Trade, Transportation, and Utilities	28,900	28,900	27,900	0	1,000
Wholesale trade	5,800	5,800	5,500	0	300
Retail trade	19,500	19,600	19,200	-100	300
General Merchandise and Clothing Stores	5,500	5,400	5,300	100	200
Food and Beverage Stores	4,100	4,100	4,000	0	100
Transportation, Warehousing, and Utilities	3,600	3,500	3,200	100	400
Information	3,500	3,500	3,300	0	200
Financial Activities	7,100	7,100	7,300	0	-200
Professional and Business Services	15,400	15,300	15,600	100	-200
Administrative and Support Services	8,200	7,800	7,700	400	500
Educational and Health Services	22,900	22,700	22,800	200	100
Health Care	18,200	18,100	18,000	100	200
Leisure and Hospitality	14,700	14,800	14,400	-100	300
Accommodation and Food Services	13,100	13,200	12,800	-100	300
Food Services and Drinking Places	11,600	11,700	11,300	-100	300
Other Services	4,800	4,900	4,700	-100	100
Government	30,500	30,800	30,100	-300	400
Federal Government	1,600	1,600	1,600	0	0
State Government	12,900	13,000	13,100	-100	-200
State Education	10,500	10,500	11,100	0	-600
Local Government	16,000	16,200	15,400	-200	600
Local Education	9,300	9,500	8,700	-200	600
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.



**February 2014**

## INDICATORS

### UNEMPLOYMENT RATE

	Dec-13	Nov-13
Gilliam	5.9	5.7
Hood River	5.4	5.3
Sherman	6.4	6.5
Wasco	7.5	7.6
Wheeler	6.0	6.0
Oregon Raw	6.9	6.7
U.S. Raw	6.5	6.6

### Seasonally Adjusted Data

	Dec-13	Nov-13
Gilliam	5.9	6.4
Hood River	5.6	5.7
Sherman	6.1	6.5
Wasco	6.9	7.1
Wheeler	6.5	7.1
Oregon SA	7.0	7.3
U.S. SA	6.7	7.0

### TOTAL NONFARM PAYROLL EMPLOYMENT

	Dec-13 PRELIMINARY	CHANGE FROM Nov-13
Gilliam	755	5
Hood River	11,200	170
Sherman	810	10
Wasco	9,800	(70)
Wheeler	315	15

### Seasonally Adjusted Data

	Dec-13 PRELIMINARY	CHANGE FROM Nov-13
Gilliam	750	10
Hood River	10,640	0
Sherman	810	5
Wasco	9,910	110
Wheeler	320	30

## Mid-Columbia 2013 Annual Unemployment Rates (preliminary)

The 2013 annual unemployment rates in Oregon (preliminary data) ranged from a low of 5.8 percent in Benton County to a high of 12.4 percent in Crook and Harney counties. Crook County's unemployment rate improved drastically in 2013, falling by 1.7 percentage points to claim the biggest one-year improvement among Oregon's 36 counties. Harney County's unemployment rate moved a little less than Benton County's 0.3 percentage point drop, falling by just 0.2 percentage point.

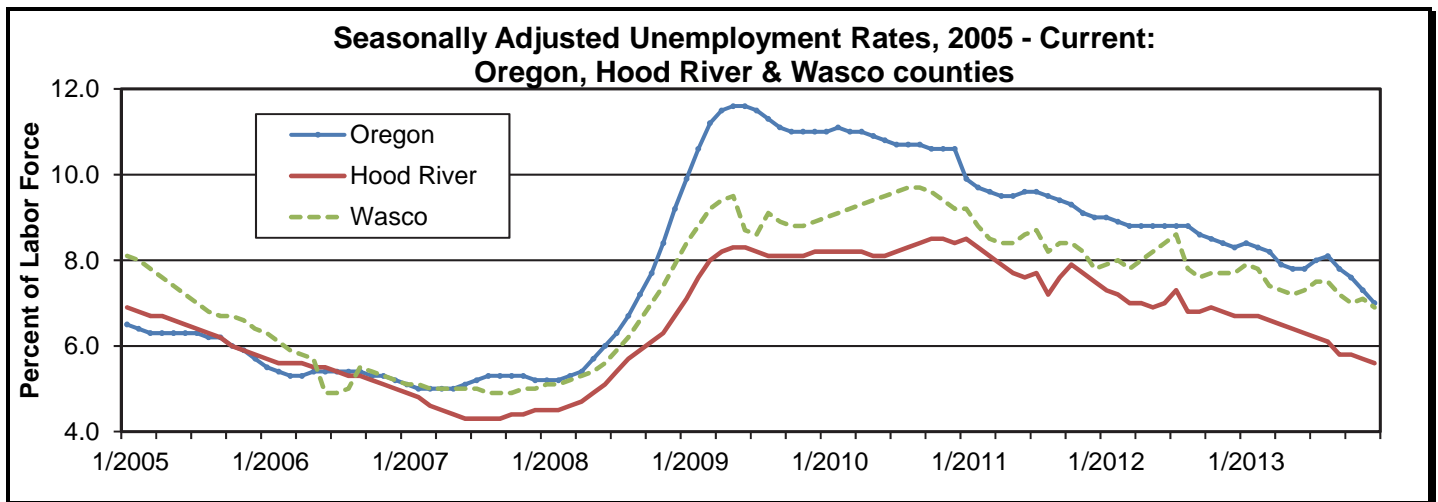
In the Mid-Columbia Region, Sherman County stood out in 2013 for its much-improved 7.1 percent unemployment rate. Sherman County's 2013 unemployment rate, with a drop of 1.3 percentage points, was low enough to rank ninth among Oregon's 36 counties.

Hood River County impressed in 2013, claiming Oregon's second lowest unemployment rate at 6.1 percent. Hood River County's unemployment rate was just 7.0 percent in 2012, falling 0.9 percentage points in 2013 to maintain its second place ranking.

Gilliam County's unemployment rate averaged 6.8 percent in 2013, a drop of 0.6 percentage point compared with 2012. Gilliam County maintained its fourth place ranking in 2013, tied with Clatsop County.

Wheeler County's 6.9 percent annual unemployment rate was low enough to rank sixth in 2013, tied with Clackamas County. Wheeler County's annual unemployment rate fell by 0.7 percentage point in 2013, a nice improvement, although its ranking in 2012 was slightly better.

Wasco County's annual unemployment rate fell by 0.6 percentage point in 2013 to average 7.3 percent. Wasco County's 7.3 percent unemployment rate was low enough to rank 10<sup>th</sup> in Oregon, tied with Tillamook County.



The Mid-Columbia region certainly impressed in 2013, improving on already low unemployment rates. Hood River County (2<sup>nd</sup> lowest), Gilliam County (4<sup>th</sup>), Wheeler County (6<sup>th</sup>), Sherman County (9<sup>th</sup>), and Wasco County (10<sup>th</sup>) performed well, with all five counties ranking among Oregon's top 10.

### Mid-Columbia Trends – November 2013

**Unemployment:** Oregon's seasonally adjusted unemployment rate fell by 0.3 percentage point in December to 7.0 percent. Compared with December 2012, Oregon's unemployment rate fell by 1.3 percentage points over the year.

Hood River County's seasonally adjusted unemployment rate was little changed in December, falling by 0.1 percentage point to 5.6 percent. This was good enough to rank as Oregon's second lowest county, right behind first place Benton County's 5.3 percent. Compared with December 2012, Hood River County's seasonally adjusted unemployment rate fell by 1.0 percentage point.

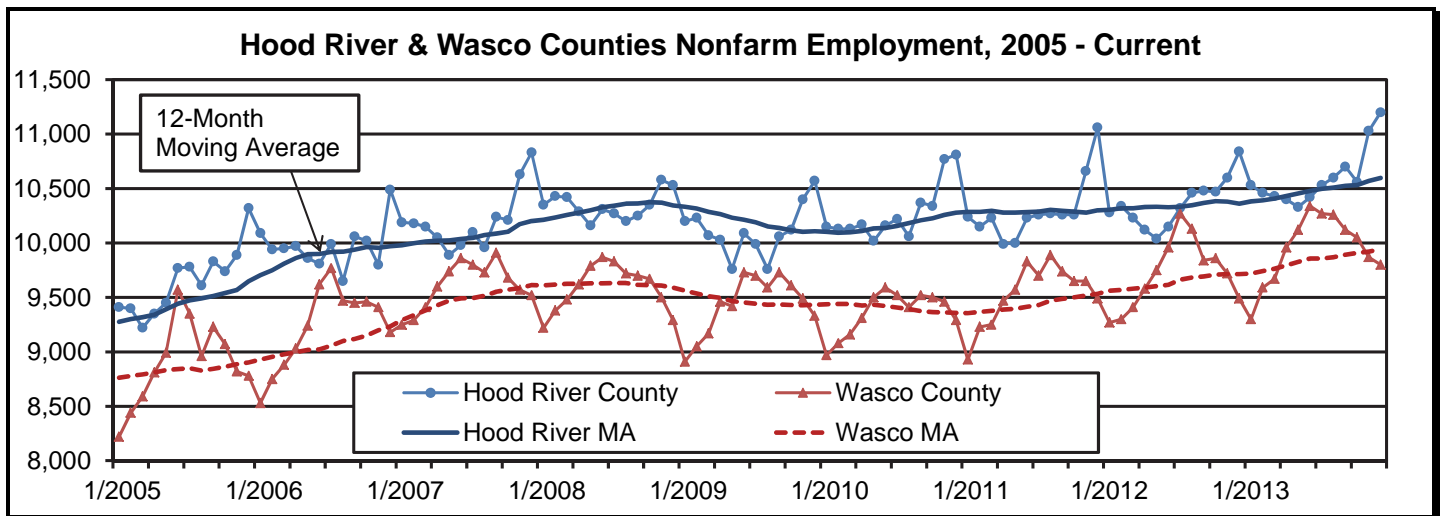
Wasco County's seasonally adjusted unemployment rate fell by 0.2 percentage point in December to 6.9 percent, ranking 13<sup>th</sup> in a three-way tie with Lane and Polk counties. Over the year, Wasco County's seasonally adjusted unemployment rate fell by 0.6 percentage point.

Gilliam County's seasonally adjusted unemployment rate fell by 0.5 percentage point in December to 5.9 percent, ranking fourth in Oregon, just behind Washington County's 5.7 percent. Over the year, Gilliam County's seasonally adjusted unemployment rate showed considerable improvement, falling by 1.4 percentage points.

Sherman County's seasonally adjusted unemployment rate fell by 0.4 percentage point to 6.1 percent in December, ranking fifth in a tie with Clatsop County. Over the year, Sherman County's seasonally adjusted unemployment rate dropped by 1.3 percentage points.

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Wheeler County’s seasonally adjusted unemployment rate improved considerably in December, falling by 0.6 percentage point to 6.5 percent, good enough to rank tenth, just ahead of Yamhill County. Compared with December 2012, Wheeler County’s seasonally adjusted unemployment rate fell by 0.5 percentage point.

**Industry Employment: Hood River County** provided the Mid-Columbia’s highlight, gaining 180 **private industry** jobs in December to total 9,860. A loss of 10 in **government** dropped its total to 1,340 in December. With a **nonfarm payroll employment** total of 11,200, Hood River County gained 360 jobs over the 12-month period ending in December, an increase of 3.3 percent.

**Retail trade** delivered its December gifts, rising by 260 jobs to total 1,520 and matching its year-ago job total. The holiday season brings snow and jobs to Mt. Hood and in Hood River County that meant an increase of 100 jobs for **arts, entertainment, and recreation**. With 870 jobs in December, arts, entertainment and recreation also matched its year-ago total.

**Professional and business services** managed a gain of 10 in December, just enough to match its year-ago employment total at 950.

The lump of coal in December’s employment belongs to **wholesale trade**, where a loss of 150 jobs cut its total to 630. Despite the loss, wholesale trade is still up from its year-ago total of 530.

**Mining, logging, and construction** (-20), **manufacturing** (-10), and **transportation, warehousing, and utilities** (-10) also landed in the December minus column. On the positive side, each gained jobs over the year. Manufacturing rose by 90 jobs to total 1,350, transportation, warehousing and utilities gained 30 jobs over the year to total 240, while mining, logging and construction managed an increase of 10 to total 320.

**Private industry employment** rose by 380 jobs over the year in Hood River County to total 9,860. In addition to the strong performances of wholesale trade and manufacturing, **accommodation and food services** served up an over-the-year gain of 100 to total 1,390. **Private educational and health services** rose by 40 over the year to total 1,830 and **financial activities** chipped in 20 to reach 310 jobs. **Other services** suffered the private sector’s only over-the-year loss, falling by 10 to total 310.

**Government** pulled back slightly in Hood River County, cutting 10 jobs in December to total 1,340. **State government** managed a gain of 10 jobs in December to total 150, while **other local government** cut 10 to total 450. **Federal government** lost 10, falling to 90. **Local government education** held its own in December with 650 jobs, matching its year-ago total. Federal government fell 10 jobs shy of its year-ago total, other local government also lost 10, and state government held steady.

**Wasco County** slipped into a light slumber in December, cutting 30 **private industry** jobs to total 7,600. **Government** also lightened its load, cutting 40 jobs and dropping its total to 2,200. **Total nonfarm** employment fell to 9,800 jobs in December but with a silver lining, gaining 330 over the year, an increase of 3.5 percent.

**Transportation, warehousing, and utilities** provided Wasco County with its largest private industry gain in December, adding 30 to hold steady over the year with 210 jobs. **Private educational and health services** rose by 20 to total 2,080 and earned an over-the-year growth rate of 4.0 percent by adding 80 jobs.

**Manufacturing** rose by 10 in December to total 590, bettering its year-ago total by 40 jobs. **Retail trade** also chipped in 10 jobs, reaching 1,670 in December, but compared with one year ago, it landed in the minus column, cutting 10.

**Professional and business services** cut 30 jobs in December; it was joined by **leisure and hospitality** which also cut 30. Leisure and hospitality led Wasco County over the year, totaling 1,100 jobs with an 80 job, 7.8 percent gain. Professional and business services also represented, rising by 60 jobs over the year to total 590, an increase of 11.3 percent.

**Construction (-20), mining and logging (-10), and other services (-10)** all landed in Wasco County's December minus column. Construction, with 310 jobs and other services, with 380, both managed an over-the-year gain of 20, while mining and logging held steady with 60.

**Financial activities** held steady in December with 340 jobs but it dropped 20 over the year. **Wholesale trade** also held steady in December with 170 jobs, a loss of 10 compared with its December 2012 total.

**Government** pulled back in December with four in five industries cutting 10 jobs and **local education** holding steady with 820. **Federal government** lost 10 jobs over the year, dropping its total in Wasco County to 290 jobs, while **Indian tribal** gained 10 jobs to total 150. **Other local government** held steady over the year with 620 jobs and **state government** matched its total at 320. **Local education** led the way with a gain of 70.

**Gilliam County's private industry** total rose by five to 525 jobs in December, while **government** held steady with 230 jobs. With 755 **total nonfarm** jobs, Gilliam County held steady over the year with a gain of five in private industry offset by a loss of five in government.

<b>Consumer Price Index (CPI)</b>	
<b>All Items, 1982-84=100</b>	
<b>Urban Consumers</b>	
Portland-Salem, OR-WA	
Jan. - June, 2013	233.735
Yearly Change	+2.2%
Annual Average 2012	229.779
Yearly Change	+2.3%
United States	
November 2013	233.049
Yearly Change	+1.5%
Annual Average 2012	229.594
Yearly Change	+2.1%
<i>Next release: February 2014</i>	
<a href="http://www.bls.gov/cpi">http://www.bls.gov/cpi</a>	

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**Private industry** employment in **Sherman County** fell by five jobs in December. **Government** managed an increase of 15, with **federal government** adding five and **local government** gaining 10. Sherman County's 810 **nonfarm jobs** represented an increase of 15 over its year-ago total. **Private industry** rose by 10 jobs over the year to total 475 and **government** rose by five jobs to total 335.

**Wheeler County's private industry** total held steady in December at 155 jobs. **Government** provided all the month's growth, rising by 15 jobs to total 160. Wheeler County's **nonfarm employment** rose by just five jobs over the year, with government adding 10 and private industry cutting five.

## National Employment

The unemployment rate declined from 7.0 percent to 6.7 percent in December, while total nonfarm payroll employment edged up (+74,000), the U.S. Bureau of Labor Statistics reported. Employment rose in retail trade and wholesale trade but was down in information.

The number of unemployed persons declined by 490,000 to 10.4 million in December, and the unemployment rate declined by 0.3 percentage point to 6.7 percent. Over the year, the number of unemployed persons and the unemployment rate were down by 1.9 million and 1.2 percentage points, respectively.

Total nonfarm payroll employment edged up in December (+74,000). In 2013, job growth averaged 182,000 per month, about the same as in 2012 (+183,000 per month). In December, job gains occurred in retail trade and wholesale trade, while employment declined in information.

## Oregon Employment

Oregon's seasonally adjusted unemployment rate dropped to 7.0 percent in December from 7.3 percent in November. December marked Oregon's lowest unemployment rate since August 2008, when the rate was 6.7 percent.

In December, Oregon's unemployment rate fell as more people were able to find jobs and there were fewer unemployed. There were nearly 132,000 Oregonians unemployed compared with approximately 160,000 a year earlier. This drop of more than 28,000 individuals since December 2012 was good news for many families in the state and for many sectors of Oregon's economy.

Oregon's job growth in 2013 was much stronger than in the prior two years. In 2013, 37,700 jobs were added, compared with 22,000 in 2012 and 18,400 in 2011.

In recent months, the pace of expansion has accelerated. Seasonally adjusted payroll employment rose 4,400 in December, following a revised gain of 4,300 in November. Monthly gains have been the norm for some time now, with gains occurring in 13 of the past 15 months.

Job gains in December were concentrated in three of the 11 major industries: professional and business services (+1,600 jobs), government (+1,200) and other services (+900).

### Gilliam County Labor Force and Industry Employment

Labor Force Status	Dec-13	Nov-13	Dec-12	CHANGE	FROM
				Nov-13	Dec-12
Civilian Labor Force	1,035	1,023	1,092	12	(57)
Unemployment	61	58	83	3	(22)
Unemployment Rate	5.9	5.7	7.6	xxx	xxx
Unemployment Rate, seasonally adjusted	5.9	6.4	7.3	xxx	xxx
Total Employment	974	965	1,009	9	(35)

#### Nonfarm Payroll Employment

Total nonfarm	755	750	755	5	0
Total private	525	520	520	5	5
Trade, transportation, and utilities	150	150	150	0	0
Professional and business services	140	135	130	5	10
Educational and health services	65	65	70	0	(5)
Leisure and hospitality	40	40	45	0	(5)
Government	230	230	235	0	(5)
Federal government	10	10	10	0	0
State government	20	15	20	5	0
Local government	200	205	205	(5)	(5)

### Sherman County Labor Force and Industry Employment

Labor Force Status	Dec-13	Nov-13	Dec-12	CHANGE	FROM
				Nov-13	Dec-12
Civilian Labor Force	1,038	1,040	1,077	(2)	(39)
Unemployment	66	68	79	(2)	(13)
Unemployment Rate	6.4	6.5	7.3	xxx	xxx
Unemployment Rate, seasonally adjusted	6.1	6.5	7.4	xxx	xxx
Total Employment	972	972	998	0	(26)

#### Nonfarm Payroll Employment

Total nonfarm	810	800	795	10	15
Total private	475	480	465	(5)	10
Trade, transportation, and utilities	250	255	235	(5)	15
Retail trade	60	60	60	0	0
Leisure and hospitality	125	125	125	0	0
Government	335	320	330	15	5
Federal government	130	125	125	5	5
State government	35	35	40	0	(5)
Local government	170	160	165	10	5

The most recent month is preliminary, the prior month is revised. Civilian labor force includes employed and unemployed individuals 16 years and older by place of residence. Data are adjusted for multiple job-holding and commuting. Includes nonfarm payroll employment, self-employed, unpaid family workers, domestics, agriculture, and labor disputants. Unemployment rate derived by dividing unemployment by civilian labor force. Nonfarm payroll employment data cover full- and part-time employees who worked during 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. Persons on sick leave, vacations, or holidays, and being paid for that period by their employer, are considered employed. Prepared in cooperation with the U.S. Dept. of Labor

## Hood River County Labor Force and Industry Employment

Labor Force Status	Dec-13	Nov-13	Dec-12	CHANGE	FROM
				Nov-13	Dec-12
Civilian Labor Force	13,525	13,453	13,912	72	(387)
Unemployment	724	714	888	10	(164)
Unemployment Rate	5.4	5.3	6.4	XXX	XXX
Unemployment Rate, seasonally adjusted	5.6	5.7	6.6	XXX	XXX
Total Employment	12,801	12,739	13,024	62	(223)
<b>Nonfarm Payroll Employment</b>					
Total nonfarm	11,200	11,030	10,840	170	360
Total private	9,860	9,680	9,480	180	380
Mining, logging, and construction	320	340	310	(20)	10
Manufacturing	1,350	1,360	1,260	(10)	90
Trade, transportation, and utilities	2,390	2,290	2,260	100	130
Wholesale trade	630	780	530	(150)	100
Retail trade	1,520	1,260	1,520	260	0
Transportation, warehousing, and utilities	240	250	210	(10)	30
Information	140	140	140	0	0
Financial activities	310	310	290	0	20
Professional and business services	950	940	950	10	0
Educational and health services	1,830	1,830	1,790	0	40
Leisure and hospitality	2,260	2,160	2,160	100	100
Arts, entertainment, and recreation	870	770	870	100	0
Accommodation and food services	1,390	1,390	1,290	0	100
Accommodation	360	350	330	10	30
Food services and drinking places	1,030	1,040	960	(10)	70
Other services	310	310	320	0	(10)
Government	1,340	1,350	1,360	(10)	(20)
Federal government	90	100	100	(10)	(10)
State government	150	140	150	10	0
Local government	1,100	1,110	1,110	(10)	(10)
Local government education	650	650	650	0	0
Local government other	450	460	460	(10)	(10)

The most recent month is preliminary, the prior month is revised. Civilian labor force includes employed and unemployed individuals 16 years and older by place of residence. Data are adjusted for multiple job-holding and commuting. Includes nonfarm payroll employment, self-employed, unpaid family workers, domestics, agriculture, and labor disputants. Unemployment rate derived by dividing unemployment by civilian labor force. Nonfarm payroll employment data cover full- and part-time employees who worked during 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. Persons on sick leave, vacations, or holidays, and being paid for that period by their employer, are considered employed. Prepared in cooperation with the U.S. Dept. of Labor

## Wasco County Labor Force and Industry Employment

<b>Labor Force Status</b>	Dec-13	Nov-13	Dec-12	CHANGE	FROM
				Nov-13	Dec-12
Civilian Labor Force	13,317	13,321	13,363	(4)	(46)
Unemployment	1,002	1,016	1,123	(14)	(121)
Unemployment Rate	7.5	7.6	8.4	xxx	xxx
Unemployment Rate, seasonally adjusted	6.9	7.1	7.5	xxx	xxx
Total Employment	12,315	12,305	12,240	10	75
<b>Nonfarm Payroll Employment</b>					
Total nonfarm	9,800	9,870	9,470	(70)	330
Total private	7,600	7,630	7,340	(30)	260
Mining and logging	60	70	60	(10)	0
Construction	310	330	290	(20)	20
Manufacturing	590	580	550	10	40
Trade, transportation, and utilities	2,050	2,010	2,070	40	(20)
Wholesale trade	170	170	180	0	(10)
Retail trade	1,670	1,660	1,680	10	(10)
Transportation, warehousing, and utilities	210	180	210	30	0
Information	100	100	100	0	0
Financial activities	340	340	360	0	(20)
Professional and business services	590	620	530	(30)	60
Educational and health services	2,080	2,060	2,000	20	80
Ambulatory health care services	400	390	380	10	20
Nursing and residential care facilities	550	540	530	10	20
Leisure and hospitality	1,100	1,130	1,020	(30)	80
Accommodation and food services	1,010	1,030	940	(20)	70
Other services	380	390	360	(10)	20
Government	2,200	2,240	2,130	(40)	70
Federal government	290	300	300	(10)	(10)
State government	320	330	320	(10)	0
Local government	1,590	1,610	1,510	(20)	80
Indian tribal	150	160	140	(10)	10
Local education	820	820	750	0	70
Local government other	620	630	620	(10)	0

The most recent month is preliminary, the prior month is revised. Civilian labor force includes employed and unemployed individuals 16 years and older by place of residence. Data are adjusted for multiple job-holding and commuting. Includes nonfarm payroll employment, self-employed, unpaid family workers, domestics, agriculture, and labor disputants. Unemployment rate derived by dividing unemployment by civilian labor force. Nonfarm payroll employment data cover full- and part-time employees who worked during 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. Persons on sick leave, vacations, or holidays, and being paid for that period by their employer, are considered employed. Prepared in cooperation with the U.S. Dept. of Labor



## Wheeler County Labor Force and Industry Employment

Labor Force Status	Dec-13	Nov-13	Dec-12	CHANGE	FROM
				Nov-13	Dec-12
Civilian Labor Force	701	680	715	21	(14)
Unemployment	42	41	52	1	(10)
Unemployment Rate	6.0	6.0	7.3	XXX	XXX
Unemployment Rate, seasonally adjusted	6.5	7.1	7.0	XXX	XXX
Total Employment	659	639	663	20	(4)
<b>Nonfarm Payroll Employment</b>					
Total nonfarm	315	300	310	15	5
Total private	155	155	160	0	(5)
Trade, transportation, and utilities	60	60	55	0	5
Leisure and hospitality	15	15	20	0	(5)
Government	160	145	150	15	10
Federal government	5	5	5	0	0
State government	5	5	10	0	(5)
Local government	150	135	135	15	15

The most recent month is preliminary, the prior month is revised. Civilian labor force includes employed and unemployed individuals 16 years and older by place of residence. Data are adjusted for multiple job-holding and commuting. Includes nonfarm payroll employment, self-employed, unpaid family workers, domestics, agriculture, and labor disputants. Unemployment rate derived by dividing unemployment by civilian labor force. Nonfarm payroll employment data cover full- and part-time employees who worked during 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. Persons on sick leave, vacations, or holidays, and being paid for that period by their employer, are considered employed. Prepared in cooperation with the U.S. Dept. of Labor



**February 2014**

## INDICATORS

### UNEMPLOYMENT RATE

	Dec-13	Nov-13
Morrow	7.2	7.0
Umatilla	7.9	7.1
Oregon Raw	6.9	6.7
U.S. Raw	6.5	6.6

### Seasonally Adjusted Data

	Dec-13	Nov-13
Morrow	6.8	6.7
Umatilla	7.6	7.9
Oregon SA	7.0	7.3
U.S. SA	6.7	7.0

### TOTAL NONFARM PAYROLL EMPLOYMENT

	Dec-13 PRELIMINARY	CHANGE FROM Nov-13
Morrow	3,890	30
Umatilla	27,390	(360)

### Seasonally Adjusted Data

	Dec-13 PRELIMINARY	CHANGE FROM Nov-13
Morrow	3,890	30
Umatilla	27,660	180

### Consumer Price Index (CPI)

All Items, 1982-84=100

Urban Consumers

Portland-Salem, OR-WA

Jan. - Jun. 2013 233.735

Yearly Change +2.2%

Annual Average 2012 229.779

Yearly Change +2.3%

United States

December 2013 233.049

Yearly Change +1.5%

Annual Average 2012 229.594

Yearly Change +2.1%

Next release: February 2014

<http://www.bls.gov/cpi>

## Columbia Basin 2013 Annual Unemployment Rates (preliminary)

The 2013 annual unemployment rates in Oregon (preliminary data) ranged from a low of 5.8 percent in Benton County to a high of 12.4 percent in Crook and Harney counties. Crook County's unemployment rate improved drastically in 2013, falling by 1.7 percentage points to claim the biggest one-year improvement among Oregon's 36 counties. Harney County's unemployment rate moved a little less than Benton County's 0.3 percentage point drop, falling by just 0.2 percentage point.

Morrow County's 8.2 percent annual unemployment rate ranked tenth among Oregon's 36 counties in 2012. Its annual unemployment rate fell by 0.4 percentage points in 2013 to 7.8 percent but its ranking slipped to 14<sup>th</sup>, tied with Lane County.

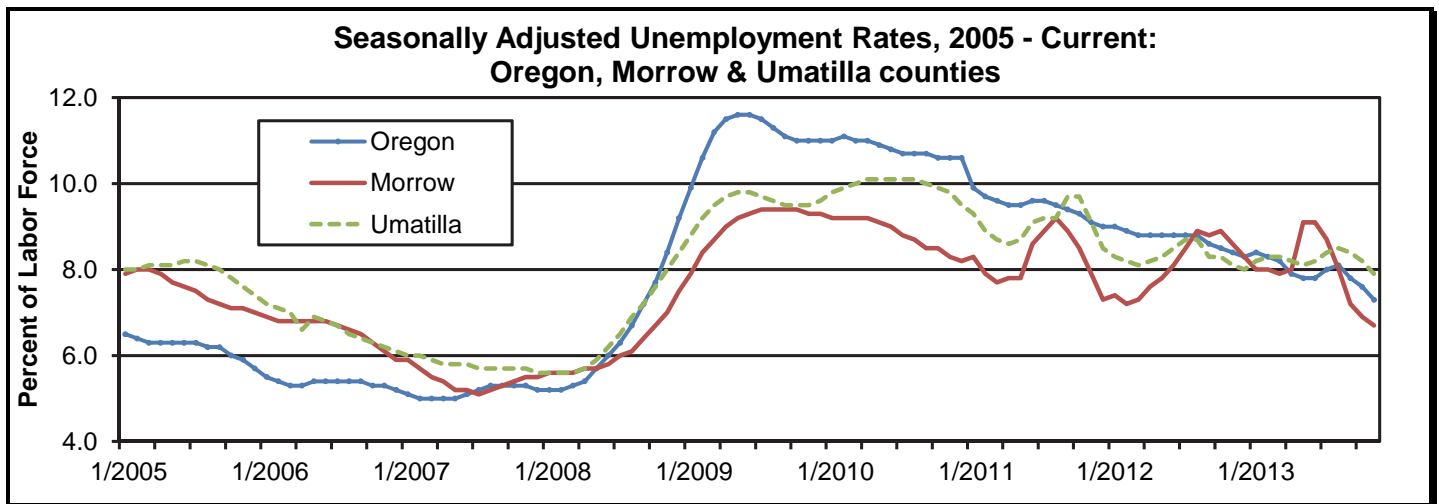
Umatilla County's 8.4 percent unemployment rate was good enough to rank 11<sup>th</sup> in 2012, in a three-way tie with Sherman and Multnomah counties. Umatilla County's annual unemployment rate improved slightly in 2013, falling by 0.3 percentage point to 8.1 percent. Umatilla County's ranking fell to 16<sup>th</sup> in 2013, just behind Morrow and Lane counties.

Annual unemployment rates fell in 2013, but Morrow County's 0.4 percentage point drop and Umatilla County's 0.3 percentage point improvement looked rather tepid compared with other Oregon counties.

## Morrow/Umatilla Trends - November 2013

**Unemployment:** Oregon's seasonally adjusted unemployment rate fell by 0.3 percentage point in December to 7.0 percent. Compared with December 2012, Oregon's unemployment rate fell by 1.3 percentage points over the year.

Morrow County's seasonally adjusted unemployment rate rose slightly in December, with a 0.1 percentage point



increase to 6.8 percent, which was good enough to rank 12<sup>th</sup> in Oregon. Compared with last year, Morrow County’s seasonally adjusted unemployment rate fell by 1.4 percentage points.

Umatilla County’s seasonally adjusted unemployment rate fell by 0.3 percentage point in December to 7.6 percent, which was good enough to rank 18<sup>th</sup> in Oregon, tied with Union County. Compared with December 2012, Umatilla County’s seasonally adjusted unemployment rate fell by 0.6 percentage point.

**Industry Employment:** Morrow County’s **total private** employment rose by 30 jobs in December to 3,010 while **government** held steady with 880 jobs. With 3,890 **total nonfarm** jobs in December, Morrow County managed an impressive over-the-year increase of 380 jobs or 10.8 percent.

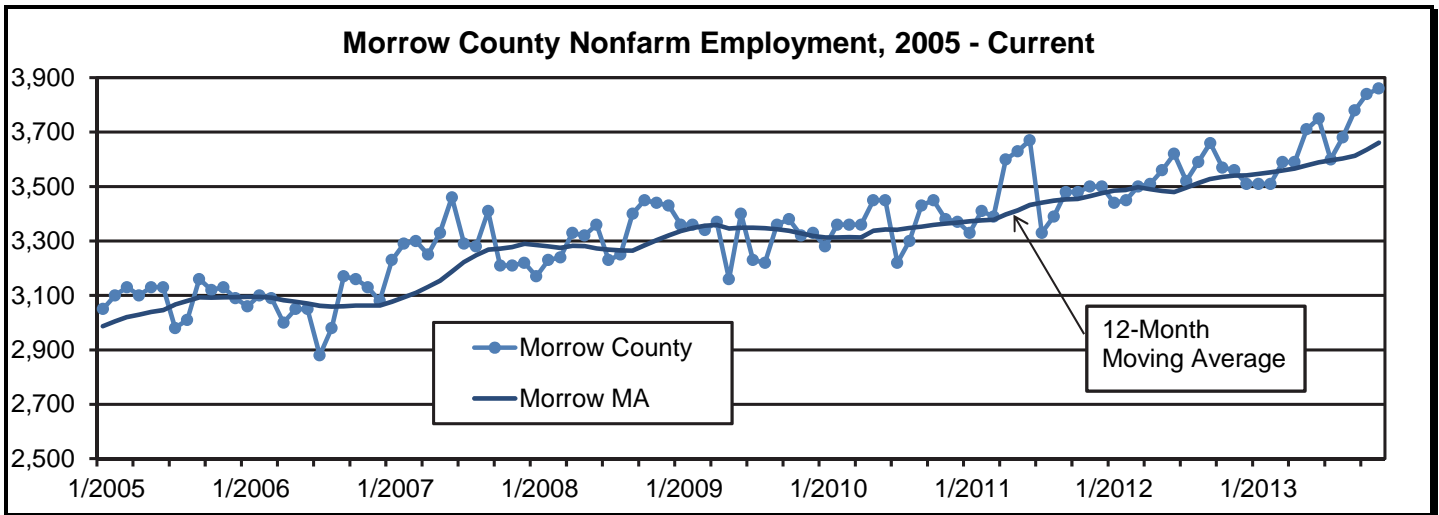
**Manufacturing** highlighted Morrow County’s employment news in December, rising by 20 jobs to total 1,400. **Financial activities** rose by 10 jobs in December to total 90 and **other services** chipped in 10 to total 50.

**Manufacturing** also provided a big over-the-year boost, rising by 210 or 17.6 percent. **Construction** also impressed over the year, rising by 70 jobs to total 140. Over-the-year job gains in **retail trade** (+20), **leisure and hospitality** (+20), **transportation, warehousing, and utilities** (+10), **information** (+10), **professional and business services** (+10), **private educational and health services** (+10), and **other services** (+10) also contributed.

**Government** held steady in December while managing a small gain of 10 jobs over the year. **Local government** rose by 10 over the year to total 720, **state government** gained 10 jobs to total 120, and **federal government** cut 10 jobs to total 40.

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Umatilla County's **private industry** employment fell by 230 in December to total 20,060. **Government** cut 130 jobs, dropping to 7,330. With a **nonfarm payroll employment** total of 27,390, Umatilla County lost 260 jobs over the year ending in December, a drop of 0.9 percent.

**Food manufacturing** proved to be Umatilla County's weak spot in December, with a loss of 170 jobs, cutting its total to 1,650. **Mining, logging, and construction** also took a hit in December, falling by 80 jobs to total 890.

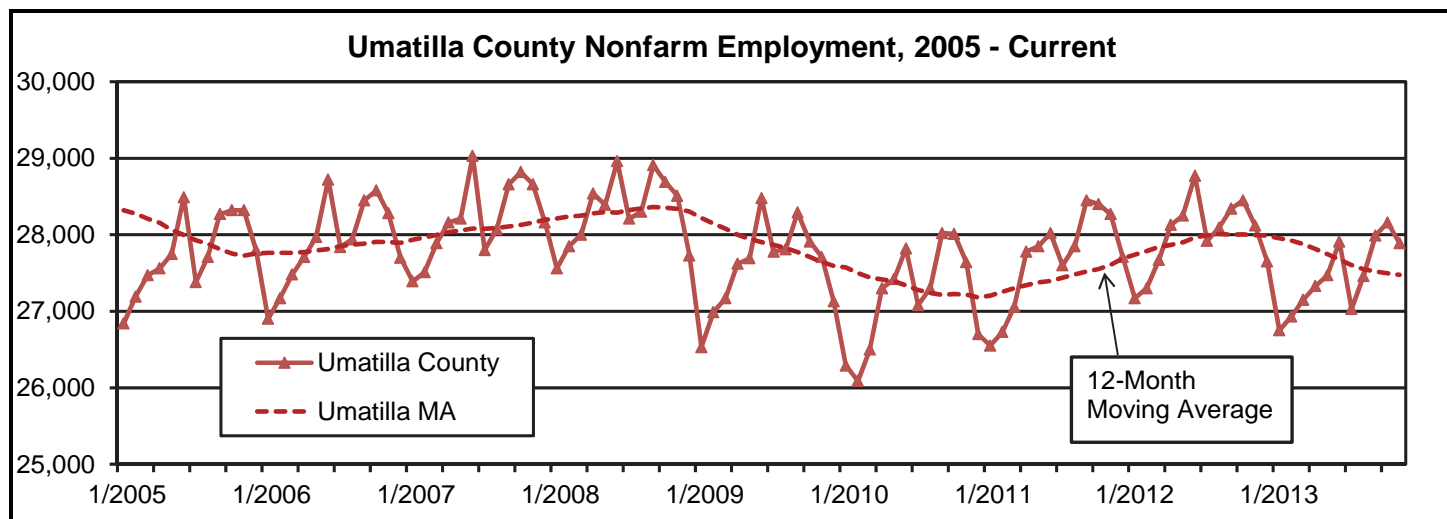
**Professional and business services** provided Umatilla County's private sector with its biggest boost in December, rising by 30 jobs to total 2,040. **Retail trade** chipped in 20, rising to 3,230 jobs. **Wholesale trade** (+10) and **transportation, warehousing and utilities** (+10) also gained jobs in December.

Over the year, Umatilla County's **private industry** employment fell by 250 jobs, a loss of 1.2 percent. **Professional and business services** proved to be Umatilla County's weak spot, with a loss of 300 jobs over the year, dropping its total to 2,040 (-12.8%). Job losses in professional and business services reflect the closure of the Umatilla Depot. **Food manufacturing** certainly disappointed, cutting 140 jobs over the year, while **financial activities** lost 30, dropping its total to 810.

**Leisure and hospitality** provided Umatilla County's private sector with its biggest boost, rising by 50 jobs over the year ending in December. **Wholesale trade** impressed with an over-the-year gain of 40 jobs and it was joined by an increase of 40 in **transportation, warehousing and utilities**. **Retail trade** rose by 30 over the year, **information** rose by 20 jobs to total 180 and **other services** chipped in 10.

**Government** cut jobs across the board in December leading to a loss of 130. **Local education** dropped by 50 in December, cutting its total to 2,490. **State government** lost 40 in December, leaving 1,760 jobs, and **Indian tribal** cut 20, dropping its total to 1,580. **Federal government** lost 10 jobs in December, falling to 490, and **other local government** shed 10 jobs to total 1,010.

Over the year ending in December, **government** employment fell by 10 jobs on mixed results. **State government** and **local education** held steady over the year but **federal government** cut 30 jobs.



Over-the-year job gains in **Indian tribal** (+10) and **other local government** (+10) provided a partial offset.

## National Employment

The unemployment rate declined from 7.0 percent to 6.7 percent in December, while total nonfarm payroll employment edged up (+74,000), the U.S. Bureau of Labor Statistics reported. Employment rose in retail trade and wholesale trade but was down in information.

The number of unemployed persons declined by 490,000 to 10.4 million in December, and the unemployment rate declined by 0.3 percentage point to 6.7 percent. Over the year, the number of unemployed persons and the unemployment rate were down by 1.9 million and 1.2 percentage points, respectively.

Total nonfarm payroll employment edged up in December (+74,000). In 2013, job growth averaged 182,000 per month, about the same as in 2012 (+183,000 per month). In December, job gains occurred in retail trade and wholesale trade, while employment declined in information.

## Oregon Employment

Oregon's seasonally adjusted unemployment rate dropped to 7.0 percent in December from 7.3 percent in November. December marked Oregon's lowest unemployment rate since August 2008, when the rate was 6.7 percent.

In December, Oregon's unemployment rate fell as more people were able to find jobs and there were fewer unemployed. There were nearly 132,000 Oregonians unemployed compared with approximately 160,000 a year earlier. This drop of more than 28,000 individuals since December 2012 was good news for many families in the state and for many sectors of Oregon's economy.

Oregon's job growth in 2013 was much stronger than in the prior two years. In 2013, 37,700 jobs were added, compared with 22,000 in 2012 and 18,400 in 2011.

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In recent months, the pace of expansion has accelerated. Seasonally adjusted payroll employment rose 4,400 in December, following a revised gain of 4,300 in November. Monthly gains have been the norm for some time now, with gains occurring in 13 of the past 15 months.

Job gains in December were concentrated in three of the 11 major industries: professional and business services (+1,600 jobs), government (+1,200) and other services (+900).

## Morrow County Labor Force and Industry Employment

Labor Force Status	Dec-13	Nov-13	Dec-12	CHANGE	FROM
				Nov-13	Dec-12
Civilian Labor Force	5,196	5,313	5,321	(117)	(125)
Unemployment	372	374	463	(2)	(91)
Unemployment Rate	7.2	7.0	8.7	xxx	xxx
Unemployment Rate, seasonally adjusted	6.8	6.7	8.2	xxx	xxx
Total Employment	4,824	4,939	4,858	(115)	(34)
<b>Nonfarm Payroll Employment</b>					
Total nonfarm	3,890	3,860	3,510	30	380
Total private	3,010	2,980	2,640	30	370
Mining and logging	20	20	20	0	0
Construction	140	140	70	0	70
Manufacturing	1,400	1,380	1,190	20	210
Trade, transportation, and utilities	880	890	850	(10)	30
Wholesale trade	360	360	360	0	0
Retail trade	180	190	160	(10)	20
Transportation, warehousing, and utilities	340	340	330	0	10
Information	30	30	20	0	10
Financial activities	90	80	90	10	0
Professional and business services	80	80	70	0	10
Educational and health services	160	160	150	0	10
Leisure and hospitality	160	160	140	0	20
Other services	50	40	40	10	10
Government	880	880	870	0	10
Federal government	40	40	50	0	(10)
State government	120	120	110	0	10
Local government	720	720	710	0	10

The most recent month is preliminary, the prior month is revised. Civilian labor force includes employed and unemployed individuals 16 years and older by place of residence. Data are adjusted for multiple job-holding and commuting. Includes nonfarm payroll employment, self-employed, unpaid family workers, domestics, agriculture, and labor disputants. Unemployment rate derived by dividing unemployment by civilian labor force. Nonfarm payroll employment data cover full- and part-time employees who worked during 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. Persons on sick leave, vacations, or holidays, and being paid for that period by their employer, are considered employed. Prepared in cooperation with the U.S. Dept. of Labor



## Umatilla County Labor Force and Industry Employment

	Dec-13	Nov-13	Dec-12	CHANGE Nov-13	FROM Dec-12
<b>Labor Force Status</b>					
Civilian Labor Force	37,596	38,157	38,219	(561)	(623)
Unemployment	2,975	2,710	3,354	265	(379)
Unemployment Rate	7.9	7.1	8.8	xxx	xxx
Unemployment Rate, seasonally adjusted	7.6	7.9	8.2	xxx	xxx
Total Employment	34,621	35,447	34,865	(826)	(244)
<b>Nonfarm Payroll Employment</b>					
Total nonfarm	27,390	27,750	27,650	(360)	(260)
Total private	20,060	20,290	20,310	(230)	(250)
Mining, logging and construction	890	970	890	(80)	0
Manufacturing	3,080	3,270	3,190	(190)	(110)
Durable goods	1,200	1,210	1,190	(10)	10
Nondurable goods	1,880	2,060	2,000	(180)	(120)
Food manufacturing	1,650	1,820	1,790	(170)	(140)
Trade, transportation, and utilities	6,790	6,750	6,680	40	110
Wholesale trade	750	740	710	10	40
Retail trade	3,230	3,210	3,200	20	30
Food and beverage stores	630	630	630	0	0
General merchandise stores	840	830	870	10	(30)
Transportation, warehousing, and utilities	2,810	2,800	2,770	10	40
Information	180	180	160	0	20
Financial activities	810	810	840	0	(30)
Professional and business services	2,040	2,010	2,340	30	(300)
Educational and health services	3,190	3,190	3,190	0	0
Nursing and residential care facilities	980	970	950	10	30
Leisure and hospitality	2,350	2,370	2,300	(20)	50
Accommodation and food services	2,210	2,240	2,140	(30)	70
Other services	730	740	720	(10)	10
Government	7,330	7,460	7,340	(130)	(10)
Federal government	490	500	520	(10)	(30)
State government	1,760	1,800	1,760	(40)	0
Local government	5,080	5,160	5,060	(80)	20
Indian tribal	1,580	1,600	1,570	(20)	10
Local education	2,490	2,540	2,490	(50)	0
Local government other	1,010	1,020	1,000	(10)	10

The most recent month is preliminary, the prior month is revised. Civilian labor force includes employed and unemployed individuals 16 years and older by place of residence. Data are adjusted for multiple job-holding and commuting. Includes nonfarm payroll employment, self-employed, unpaid family workers, domestics, agriculture, and labor disputants. Unemployment rate derived by dividing unemployment by civilian labor force. Nonfarm payroll employment data cover full- and part-time employees who worked during 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. Persons on sick leave, vacations, or holidays, and being paid for that period by their employer, are considered employed. Prepared in cooperation with the U.S. Dept. of Labor



**February 2014**

***In this issue:***

- Unemployment rates steady in November in northwest Oregon, but on a downward trend
- Regional job count dropped by 60 in December on a seasonally adjusted basis, but gained over the past year
- Regional population growing again (Page 4)
- Youth employment falling (Page 6)

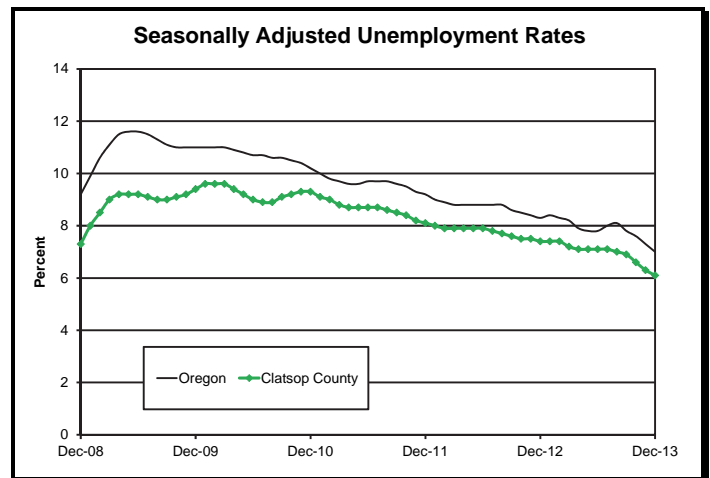
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**CLATSOP COUNTY**

Clatsop County's seasonally adjusted unemployment rate was 6.1 percent in December, essentially the same as the previous month (6.3%), but lower than the year before (7.4%). It was lower than the statewide rate (7.0%) and the national rate (6.7%). Clatsop County had the fifth-lowest rate in the state in December. Its unemployment rate peaked at 9.6 percent in early 2010 and has declined fairly steadily since then.

Seasonally adjusted nonfarm payroll employment fell by 10 in December to 17,040. Seasonally adjusted figures compare expected



<b>Economic Indicators</b>					
	<b>Seasonally Adjusted Unemployment Rates</b>		<b>Seasonally Adjusted Employment Change</b>		<b>2012 Average Pay Per Job</b>
	December	November	Monthly	Annual	Annual
Clatsop	6.1%	6.3%	-10	320	\$32,844
Columbia	7.5%	7.7%	0	120	\$33,557
Tillamook	6.3%	6.6%	-50	190	\$32,287

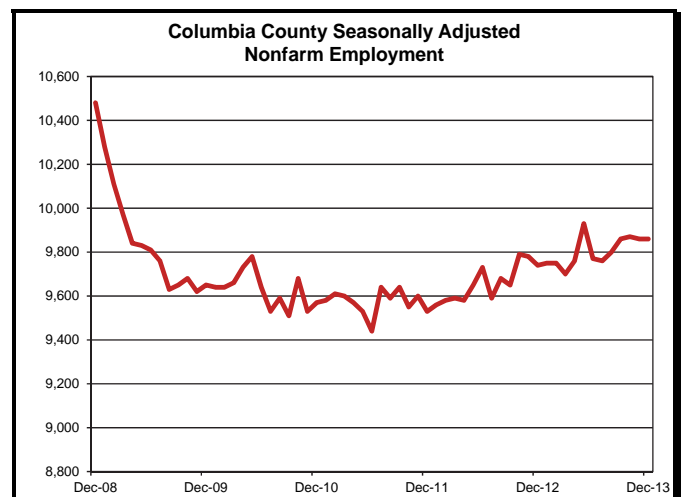
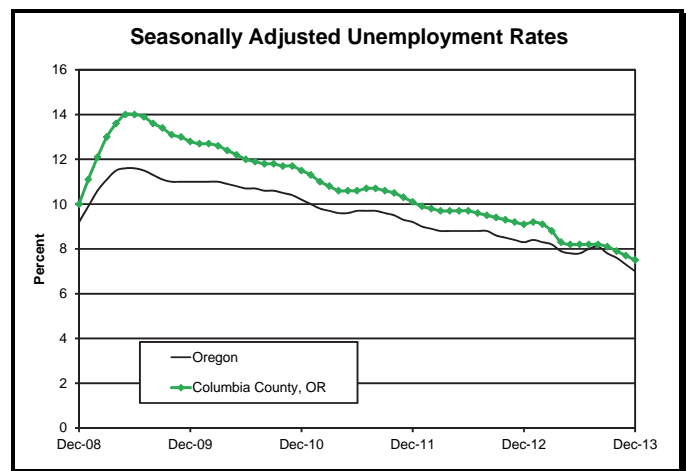
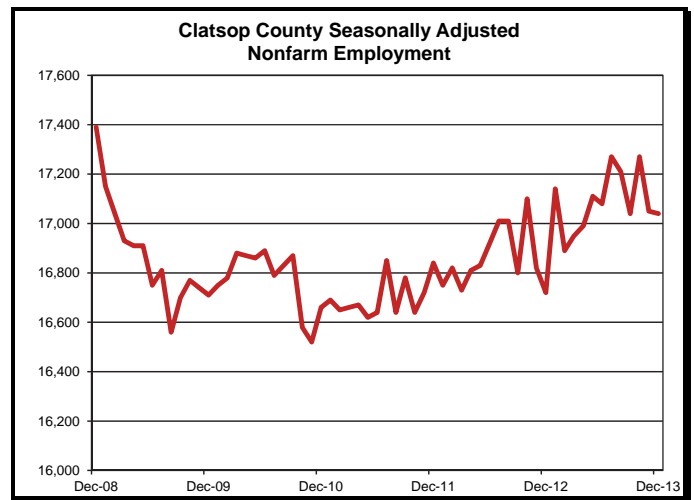
changes with actual changes. A loss of 170 jobs is normal for the month, but the county shed 180 jobs. The private sector lost 120 jobs and governments dropped 60. Leisure and hospitality shed 140 jobs and private educational and health services trimmed 30. Retail trade added 40 jobs and food manufacturing employment rose by 30. Local governments cut 50 jobs.

December's total nonfarm payroll employment was 310 more than its level last year. Industries adding the most jobs over the past year included retail trade (+280), leisure and hospitality (+110), and food manufacturing (+60). Industries shedding jobs were transportation, warehousing, and utilities (-130) and paper manufacturing (-60).

## COLUMBIA COUNTY

Columbia County's seasonally adjusted unemployment rate was 7.5 percent in December, essentially unchanged from the previous month (7.7%), but lower than the year before (9.1%). The rate was higher than the statewide rate (7.0%), and higher than the national rate (6.7%). Columbia County's unemployment rate ranked 16<sup>th</sup> lowest of Oregon's 36 counties in December. The rate peaked at 14 percent in mid-2009. It has declined fairly steadily since then and gotten closer to the statewide rate.

Seasonally adjusted nonfarm payroll employment was unchanged in December at 9,860. Seasonally adjusted figures compare expected changes with actual changes. A loss of 60 jobs is normal for the month, and the county lost 60. The private sector shed 90 jobs and government employment increased by 30. The professional and business services sector shed 40 jobs and the manufacturing and leisure and hospitality sectors each shed 20 jobs.



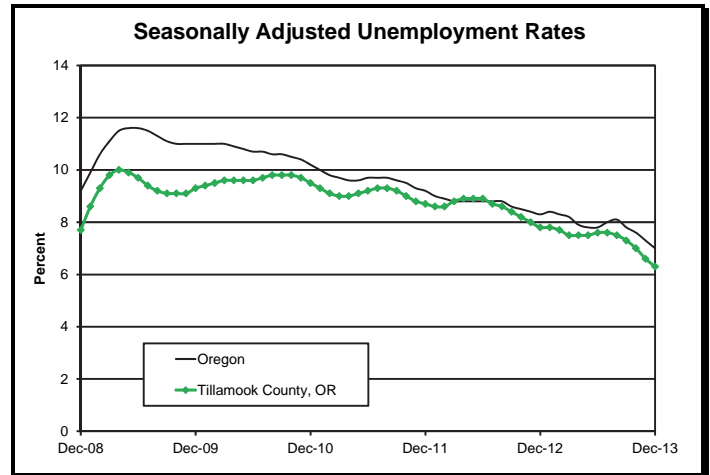
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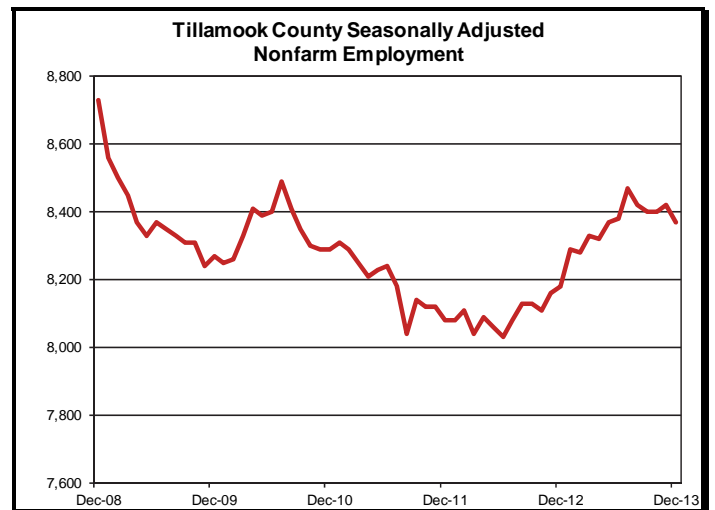
Total nonfarm employment in December was 120 more than one year before. Private sector employment grew by 150 and government employment decreased by 30 over the past year. Industries adding the most jobs since last year were durable goods manufacturing (+110) and trade, transportation, and utilities (+130). Professional and business services (-50) and paper manufacturing (-70) cut the most jobs over the year.

## TILLAMOOK COUNTY

Tillamook County's seasonally adjusted unemployment rate was 6.3 percent in December, essentially unchanged from the previous month (6.6%), but lower than the year before (7.8%). It was lower than the statewide rate (7.0%), and about the same as the national rate (6.7%). Tillamook County's unemployment rate ranked as ninth-lowest of Oregon's 36 counties in December. The rate peaked at 10 percent in the spring of 2009. It has declined unevenly since then.



Seasonally adjusted nonfarm payroll employment fell by 50 jobs in December to 8,370. Seasonally adjusted figures compare expected changes with actual changes. A loss of 150 nonfarm jobs was expected for the month, but the county's nonfarm payroll employment fell by 200. The private sector lost 160 jobs and government employment dropped by 40. The leisure and hospitality sector shed 90 jobs and manufacturing cut 20 jobs. Professional and business services also trimmed 20 jobs. Local government, which includes education, shed 40 jobs.



December's total nonfarm employment was 180 more than one year before, an annual growth of 2.3 percent. The private sector added 190 jobs and government trimmed 10. Industries that added the most jobs since last year included leisure and hospitality (+50) and trade, transportation, and utilities (+110).

## Community News

**Recreation Lanes**, a bowling alley in **Gearhart**, will re-open with new owners. *The North Coast Citizen*, 12/28/2013

**Foxgloves**, a gift and notions store in **Astoria**, closed. **Panache Hair and Nail Studio** moved from **Cannon Beach** to **Astoria**. *The Daily Astorian*, 1/9/2014

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**Lower Columbia Clinic**, a family medicine practice in **Astoria**, added a physician. *The Daily Astorian*, 1/16/2014

**NW Innovation Works LLC** plans to build a methanol manufacturing facility at the Port Westward industrial park north of **Clatskanie**. It will export methanol directly to the city government of Dalian, China for use in plastics manufacturing and expects to employ about 120 workers. *The South County Spotlight*, 1/22/2014

**Karla's Smokehouse** in **Rockaway Beach** closed. It offered smoked fish, oysters, and meats. *The North Coast Citizen*, 12/24/2013

The **Cloverdale Liquor Store** closed. The inventory and future liquor sales in south **Tillamook County** will move to **Chester's** market in **Pacific City**. *Headlight-Herald*, 12/25/2013

The **Manzanita Visitors' Center**, a project of the **Manzanita Business Alliance**, opened. It will be staffed by the **City of Manzanita** and area volunteers. The Alliance hired a coordinator to create a website and recruit volunteers. *Headlight-Herald*, 1/15/2014

## Oregon Employment

Oregon's seasonally adjusted unemployment rate dropped to 7.0 percent in December from 7.3 percent in November. December marked Oregon's lowest unemployment rate since August 2008, when the rate was 6.7 percent. In December, Oregon's unemployment rate fell as more people were able to find jobs and there were fewer unemployed. There were nearly 132,000 Oregonians unemployed compared with approximately 160,000 a year earlier. This drop of more than 28,000 individuals since December 2012 was good news for many families in the state and for many sectors of Oregon's economy.

Oregon's job growth in 2013 was much stronger than in the prior two years. In 2013, 37,700 jobs were added, compared with 22,000 in 2012 and 18,400 in 2011. In recent months, the pace of expansion has accelerated. Seasonally adjusted payroll employment rose 4,400 in December, following a revised gain of 4,300 in November. Monthly gains have been the norm for some time now, with gains occurring in 13 of the past 15 months.

Job gains in December were concentrated in three of the 11 major industries: professional and business services (+1,600 jobs), government (+1,200) and other services (+900).

## Region 1 Population – Cities and Counties

The population of Region 1 increased by 320 to an estimated 112,495 in 2013. The average annualized growth rate since 2010 has been about 0.2 percent, much slower than the 1.1 annual percentage growth during the 1990s and even slower than 0.3 percent rate of the recession-plagued 1980s. Population growth seems tied to economic performance in the region. The region grew by nearly 1,000 or more people each year from 2005 through 2008. Growth has since slowed again as immigration dropped. The Census of 2010 showed that actual population in the region was lower than the previous estimates indicated.

All three counties in Region 1 – Clatsop, Columbia, and Tillamook – have been growing over the long run. The 2010 Census showed that population estimates for Clatsop and Tillamook counties were too high so they were reduced by 770 in Clatsop County and by 870 in Tillamook County. Columbia County’s census showed that population was higher than estimated and its population was revised to show growth of 1,020 in 2010.

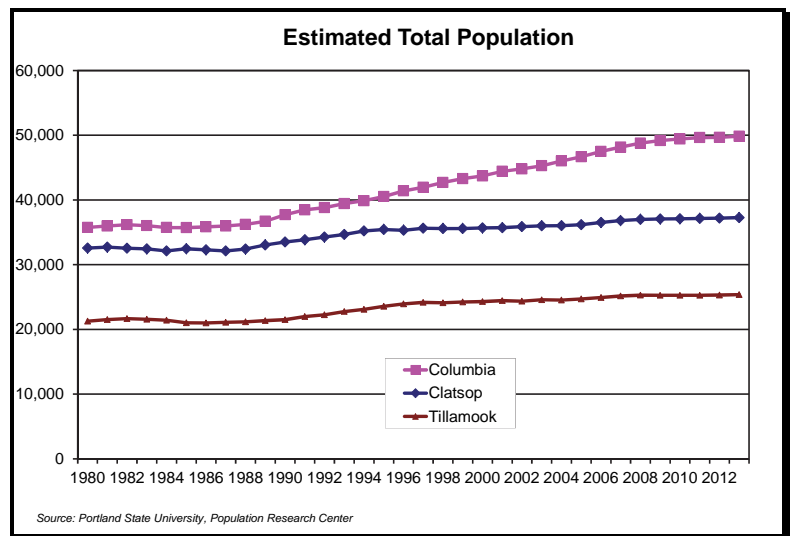
In spite of the 1993 closure of the Trojan Nuclear Power Plant near Rainier and the layoffs at Boise Paper in St. Helens in early 2009, Columbia County accounted for much of the region’s increase during the 1990s and still provides most of the population growth in the region. Columbia’s population growth is fueled by its higher birth rate and its proximity to the Portland metropolitan area. The county’s population grew by 170 in 2013.

Clatsop County grew more slowly. The county added 70 residents in 2013. The county’s population is older on average than Columbia County and relies more on migration for population growth.

Tillamook County’s population is distinctly older than either Clatsop County’s or Columbia County’s. Births outnumbered deaths for the period 2001-2010 and the county relied on migration for growth. The county’s estimated population increased by 70 in 2013. It also had the slowest rate of growth of the three counties in 2013.

**Cities**

Most of Columbia’s recent population increase has been concentrated in the southern portion, such as Scappoose, where commuting distances to the core Portland job market are shortest and in



**Graph 1**

**Table 1**

Northwest Oregon Population, 2013				
County and City	2013 Population Estimate	Change Since 2010	Annual Average Change 2010-2013	2010 Census
<b>CLATSOP</b>	37,270	200	0.2%	37,070
Astoria	9,525	50	0.2%	9,475
Cannon Beach	1,705	10	0.2%	1,695
Gearhart	1,480	15	0.3%	1,465
Seaside	6,560	100	0.5%	6,460
Warrenton	5,135	135	0.9%	5,000
Unincorporated	12,865	-110	-0.3%	12,975
<b>COLUMBIA</b>	49,850	420	0.3%	49,430
Clatskanie	1,745	10	0.2%	1,735
Columbia City	1,945	0	0.0%	1,945
Prescott	55	0	0.0%	55
Rainier	1,900	5	0.1%	1,895
St. Helens	12,895	-10	0.0%	12,905
Scappoose	6,700	70	0.4%	6,630
Vernonia	2,065	-90	-1.4%	2,155
Unincorporated	22,545	435	0.7%	22,110
<b>TILLAMOOK</b>	25,375	115	0.2%	25,260
Bay City	1,310	20	0.5%	1,290
Garibaldi	790	10	0.4%	780
Manzanita	615	15	0.8%	600
Nehalem	280	10	1.2%	270
Rockaway Beach	1,325	10	0.3%	1,315
Tillamook	4,885	-35	-0.2%	4,920
Wheeler	415	0	0.0%	415
Unincorporated	15,755	85	0.2%	15,670

Source: Population Research Center, Portland State University

unincorporated parts of the county. About 45 percent of the county's population resides in unincorporated areas. Most of Columbia's major population centers are on the flat bottomlands next to the Columbia River. The only major interior community is Vernonia, located in the southwest portion of the county. Vernonia experienced a drop in population since 2010.

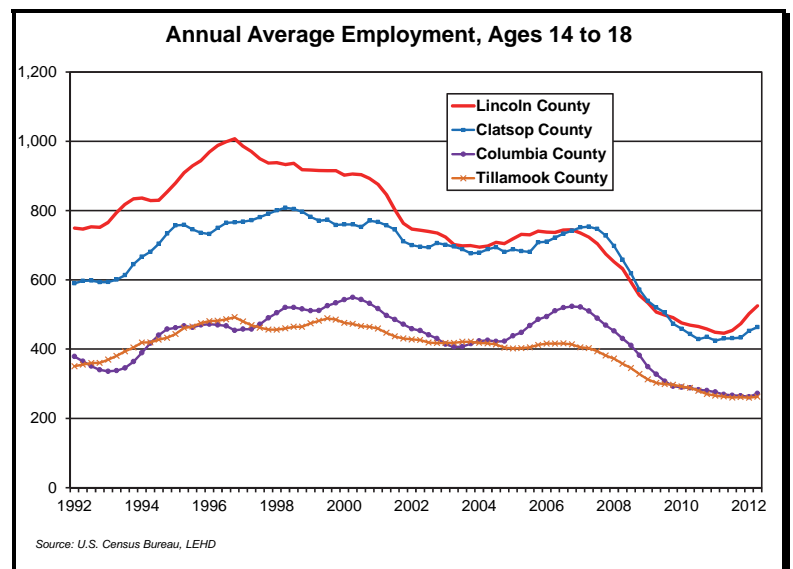
Clatsop County's growth was greatest in Seaside and Warrenton, which are on the coast and have land for development. Astoria has been hampered by a shortage of buildable land. About one-third of this county's population resides in unincorporated areas. Clatsop County's major population centers are along the coast and the Columbia River.

Tillamook County has the smallest population of the three counties in Region 1 and its cities are also smaller. About 60 percent of the county's population lives in unincorporated areas. The city of Tillamook lost 35 people since 2010.

## Youth Employment in Northwest Oregon

The number of teenagers working in Northwest Oregon fell nearly by half since the turn of the century. The Census Bureau estimates that there was an annual average of nearly 2,700 youth of ages 14 through 18 working in Clatsop, Columbia, Lincoln, and Tillamook counties in 2000. By 2012 the number fell to about 1,500.

The drop in working youth was also true at the state and national levels. The unemployment rate for Oregon youth ages 16 through 19 topped 30 percent during the recession. Nationally, labor force participation for ages 16 through 19 fell from 47 percent in 2002 to 34 percent in 2012.



Every county in Northwest Oregon shows the pattern of falling youth employment. Clatsop and Lincoln counties have more working youth – but also lost large numbers of youth from the workforce during the recession. Columbia County actually had the biggest percentage drop in youth employment during the recession, losing a full 50 percent of youth employment from 2007 through 2012.

Although all age groups were hit hard by the recession, youth especially suffered. They typically have less work experience and education than older workers, two attributes valuable to employers. Data on college and community college enrollment show that most youth were not idle, however. College enrollment soared during the recession.



## CLATSOP COUNTY CURRENT LABOR FORCE AND INDUSTRY EMPLOYMENT

(by place of residence)

	December 2013	November 2013	December 2012	Change From November 2013	Change From December 2012
Civilian labor force	19,740	20,051	20,303	-311	-563
Unemployed	1,243	1,221	1,587	22	-344
Unemployment rate	6.3%	6.1%	7.8%	0.2	-1.5
Unemployment rate, seasonally adjusted	6.1%	6.3%	7.4%	-0.2	-1.3
Total Employment	18,497	18,830	18,716	-333	-219

## CLATSOP COUNTY NONFARM PAYROLL EMPLOYMENT

(by place of work)

	December 2013	November 2013	December 2012	Change from November 2013	Change from December 2012
<b>TOTAL NONFARM PAYROLL EMPLOYMENT</b>					
Total nonfarm	16,590	16,770	16,280	-180	310
Total nonfarm, seasonally adjusted	17,040	17,050	16,720	-10	320
<b>TOTAL PRIVATE</b>	13,640	13,760	13,340	-120	300
Mining and Logging	220	230	230	-10	-10
Construction	710	700	730	10	-20
Manufacturing	1,880	1,850	1,860	30	20
Durable goods	480	480	470	0	10
Wood product manufacturing	280	290	250	-10	30
Nondurable goods	1,400	1,370	1,390	30	10
Food manufacturing	460	430	400	30	60
Paper manufacturing	900	910	960	-10	-60
Trade, transportation, and utilities	3,090	3,060	2,940	30	150
Wholesale trade	170	170	170	0	0
Retail trade	2,680	2,640	2,400	40	280
Transportation, warehousing, and utilities	240	250	370	-10	-130
Information	150	150	150	0	0
Financial activities	640	640	600	0	40
Professional and business services	670	680	660	-10	10
Educational and health services	2,120	2,150	2,140	-30	-20
Leisure and hospitality	3,600	3,740	3,490	-140	110
Accommodation and food services	3,360	3,520	3,250	-160	110
Accommodation	1,170	1,220	1,140	-50	30
Food services and drinking places	2,190	2,300	2,110	-110	80
Other services	560	560	540	0	20
<b>GOVERNMENT</b>	2,950	3,010	2,940	-60	10
Federal government	200	200	210	0	-10
State government	430	440	460	-10	-30
Local government	2,320	2,370	2,270	-50	50
Local education	1,260	1,290	1,160	-30	100
Local government excluding education	1,060	1,080	1,110	-20	-50
Labor-management disputes	0	0	0	0	0

The most recent month is preliminary, the prior month is revised. Prepared by the Oregon Employment Department 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.

**COLUMBIA COUNTY CURRENT LABOR FORCE AND INDUSTRY EMPLOYMENT**  
(by place of residence)

	December 2013	November 2013	December 2012	Change From November 2013	Change From December 2012
Civilian labor force	23,711	23,798	24,050	-87	-339
Unemployed	1,747	1,721	2,172	26	-425
Unemployment rate	7.4%	7.2%	9.0%	0.2	-1.6
Unemployment rate, seasonally adjusted	7.5%	7.7%	9.1%	-0.2	-1.6
Total Employment	21,964	22,077	21,878	-113	86

**COLUMBIA COUNTY NONFARM PAYROLL EMPLOYMENT**  
(by place of work)

	December 2013	November 2013	December 2012	Change from November 2013	Change from December 2012
<b>TOTAL NONFARM PAYROLL EMPLOYMENT</b>					
Total nonfarm	9,900	9,960	9,780	-60	120
Total nonfarm, seasonally adjusted	9,860	9,860	9,740	0	120
<b>TOTAL PRIVATE</b>	7,850	7,940	7,700	-90	150
Mining and Logging	180	190	190	-10	-10
Construction	450	460	460	-10	-10
Manufacturing	1,440	1,460	1,380	-20	60
Durable goods	1,000	1,010	890	-10	110
Wood product manufacturing	210	220	210	-10	0
Nondurable goods	440	450	490	-10	-50
Paper manufacturing	70	70	140	0	-70
Trade, transportation, and utilities	2,110	2,100	1,980	10	130
Retail trade	1,420	1,410	1,330	10	90
Information	60	60	60	0	0
Financial activities	470	470	470	0	0
Professional and business services	580	620	630	-40	-50
Educational and health services	1,150	1,140	1,120	10	30
Leisure and hospitality	1,030	1,050	1,000	-20	30
Other services	380	390	410	-10	-30
<b>GOVERNMENT</b>	2,050	2,020	2,080	30	-30
Federal government	70	70	70	0	0
State government	230	230	250	0	-20
Local government	1,750	1,720	1,760	30	-10
Local education	1,130	1,110	1,120	20	10
Local government excluding education	620	610	640	10	-20
Labor-management disputes	0	0	0	0	0

The most recent month is preliminary, the prior month is revised. Prepared by the Oregon Employment Department 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. "Natural resources" includes only Logging (NAICS 1133).

Columbia County is a part of the Portland Primary Metropolitan Statistical Area (PMSA). Although the labor force estimates are official, based on a procedure approved by the U.S. Bureau of Labor Statistics, they are not considered to be as accurate as those produced for the entire Portland PMSA. The Portland PMSA consists of Clackamas, Columbia, Multnomah, Washington, and Yamhill counties in Oregon, plus Clark County in Washington state.

**TILLAMOOK COUNTY CURRENT LABOR FORCE AND INDUSTRY EMPLOYMENT**  
(by place of residence)

	December 2013	November 2013	December 2012	Change From November 2013	Change From December 2012
Civilian labor force	12,133	12,326	12,247	-193	-114
Unemployed	795	779	1,006	16	-211
Unemployment rate	6.6%	6.3%	8.2%	0.3	-1.6
Unemployment rate, seasonally adjusted	6.3%	6.6%	7.8%	-0.3	-1.5
Total Employment	11,338	11,547	11,241	-209	97

**TILLAMOOK COUNTY NONFARM PAYROLL EMPLOYMENT**  
(by place of work)

	December 2013	November 2013	December 2012	Change From November 2013	Change From December 2012
<b>TOTAL NONFARM PAYROLL EMPLOYMENT</b>					
Total nonfarm	8,170	8,370	7,990	-200	180
Total nonfarm, seasonally adjusted	8,370	8,420	8,180	-50	190
<b>TOTAL PRIVATE</b>	6,250	6,410	6,060	-160	190
Mining and Logging	210	220	210	-10	0
Construction	290	300	320	-10	-30
Manufacturing	1,100	1,120	1,090	-20	10
Durable goods	300	300	310	0	-10
Wood product manufacturing	240	230	240	10	0
Nondurable goods	800	820	780	-20	20
Food manufacturing	780	790	760	-10	20
Trade, transportation, and utilities	1,340	1,350	1,230	-10	110
Retail trade	990	1,000	940	-10	50
Information	40	40	50	0	-10
Financial activities	330	340	330	-10	0
Professional and business services	410	430	370	-20	40
Educational and health services	970	960	990	10	-20
Leisure and hospitality	1,180	1,270	1,130	-90	50
Accommodation and food services	1,120	1,190	1,070	-70	50
Accommodation	300	320	310	-20	-10
Food services and drinking places	820	870	760	-50	60
Other services	380	380	340	0	40
<b>GOVERNMENT</b>	1,920	1,960	1,930	-40	-10
Federal government	110	100	110	10	0
State government	400	410	390	-10	10
Local government	1,410	1,450	1,430	-40	-20
Local education	710	730	700	-20	10
Local government excluding education	700	720	730	-20	-30
Labor-management disputes	0	0	0	0	0

The most recent month is preliminary, the prior month is revised. Prepared by the Oregon Employment Department 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.

<b>Oregon Seasonally Adjusted Unemployment Rates by Area (1)</b>			
	<u>December 2013</u>	<u>November 2013</u>	<u>December 2012</u>
United States	6.7	7.0	7.9
State of Oregon	7.0	7.3	8.3
<u>Metropolitan Statistical Areas:</u>			
Bend (Deschutes County)	8.9	9.1	10.4
Corvallis (Benton County)	5.3	5.4	5.9
Eugene-Springfield (Lane County)	6.9	7.2	8.2
Medford (Jackson County)	9.1	9.3	10.4
Portland-Vancouver-Hillsboro (2)	6.6	6.8	7.7
Salem (Marion and Polk counties)	7.5	7.9	8.9
<u>Counties (1):</u>			
Baker	8.8	9.2	9.4
Benton	5.3	5.4	5.9
Clackamas	6.3	6.5	7.6
Clatsop	6.1	6.3	7.4
Columbia	7.5	7.7	9.1
Coos	9.2	9.5	10.5
Crook	11.2	11.6	13.5
Curry	10.0	10.2	11.2
Deschutes	8.9	9.1	10.4
Douglas	10.0	10.3	11.5
Gilliam	5.9	6.4	7.3
Grant	10.7	11.8	13.0
Harney	11.6	11.9	12.1
Hood River	5.6	5.7	6.6
Jackson	9.1	9.3	10.4
Jefferson	9.9	10.1	11.9
Josephine	9.9	10.2	11.6
Klamath	10.0	10.3	11.3
Lake	10.1	10.7	11.9
Lane	6.9	7.2	8.2
Lincoln	7.5	7.7	8.7
Linn	8.7	9.1	10.6
Malheur	8.2	8.5	9.6
Marion	7.8	8.0	9.2
Morrow	6.8	6.7	8.2
Multnomah	6.3	6.4	7.6
Polk	6.9	7.1	8.2
Sherman	6.1	6.5	7.4
Tillamook	6.3	6.6	7.8
Umatilla	7.6	7.9	8.2
Union	7.6	7.9	8.8
Wallowa	9.6	10.1	10.2
Wasco	6.9	7.1	7.5
Washington	5.7	5.8	6.9
Wheeler	6.5	7.1	7.0
Yamhill	6.6	6.8	8.1
(1) Seasonally adjusted rates for the United States and Oregon are official Bureau of Labor Statistics (BLS) series. Source of Metro data is BLS and LAUS. Source of county data is OED.			
(2) Portland-Vancouver-Hillsboro MSA includes Clackamas, Columbia, Multnomah, Washington, and Yamhill counties in Oregon and Clark and Skamania counties in Washington.			

# LABOR TRENDS

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**February 2014**

## Economic Indicators

### Unemployment Rates

Portland MSA	Seasonally	
	Adjusted	Raw
Dec 2013	6.6%	6.2%
Nov 2013	6.8%	6.3%
Dec 2012	7.7%	7.4%
<b>Oregon</b>		
Dec 2013	7.0%	6.9%
Nov 2013	7.3%	6.7%
Dec 2012	8.3%	8.2%
<b>United States</b>		
Dec 2013	6.7%	6.5%
Nov 2013	7.0%	6.6%
Dec 2012	7.9%	7.6%

### Nonfarm Payroll Employment

(not seasonally adjusted)

	December	
	2013	2012
<b>Total</b>	<b>1,039,400</b>	<b>1,023,500</b>
Construction	51,700	46,900
Manufacturing	115,900	114,400
Trade, Trans., & Utilities	204,500	201,600
Information	23,600	23,000
Financial Activities	62,000	62,800
Professional & Bus. Svc.	145,600	141,100
Educ. & Health Services	150,100	150,000
Leisure & Hospitality	101,500	100,700
Government	145,400	145,300
High Tech *	53,500	52,200

\* (manufacturing and nonmanufacturing)

### Consumer Price Index (CPI)

United States	Dec. '13	2012
Yearly Change	1.5%	2.1%

Next release: February 2014

Portland-Salem	1st Half '13	2012
Yearly Change	2.2%	2.3%

Next release: February 2014

[www.bls.gov/cpi](http://www.bls.gov/cpi)

### University of Oregon Index of Economic Indicators

Nov. 2013	96.2	↑
Oct. 2013	95.6	

### 2013 Population

	2012-2013	% Change
Portland Metro	2,265,725	1.1%
Oregon	3,919,020	0.9%

## Portland Metro Employment Situation – December 2013

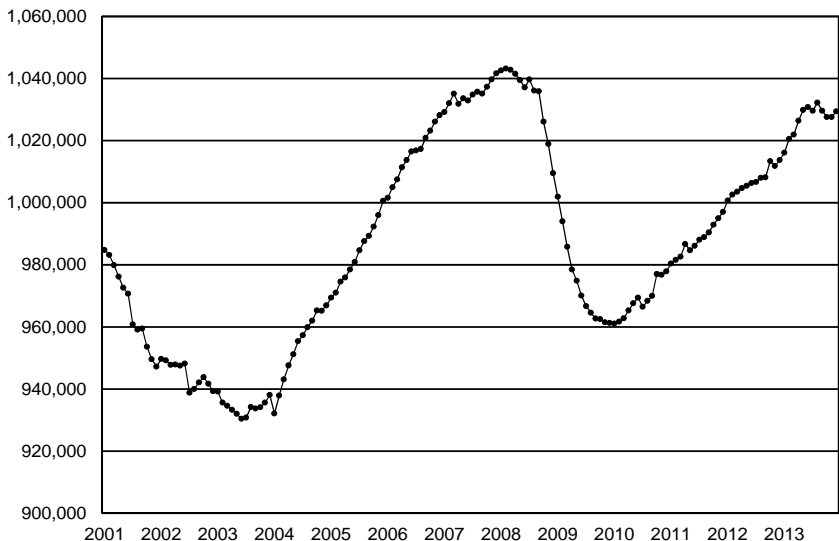
The Portland metro area's seasonally adjusted unemployment rate was 6.6 percent in December, down from November (6.8%) and from December 2012 (7.7%). An estimated 72,400 area residents were unemployed and looking for work, 15,000 fewer than one year earlier. December's rate was the lowest since August 2008, when the rate was 6.1 percent.

Oregon's unemployment rate also declined in December, from 7.3 percent to 7.0 percent. The national rate dropped to 6.7 percent.

Preliminary estimates from the federal Bureau of Labor Statistics (BLS) indicate that metro area employers added 1,800 jobs in December (seasonally adjusted).

December marked the first month of job growth since June. Meanwhile other regions across the state have seen growth accelerate, most notably Eugene, Medford, and parts of rural Oregon. Overall, the state has added jobs in 11 of the past 12 months. While job growth may have slowed in the Portland region after years of outperforming other areas of the state, it's possible that preliminary data may be overstating recent losses.

**Seasonally Adjusted Total Nonfarm Payroll Employment  
 Portland Metro Area**



On an unadjusted basis, area employers cut 1,300 jobs, several thousand fewer than typical for this time of year.

Construction pulled back after outperforming historical norms for most of 2013. Due to strong growth earlier in the year, it remains the region's fastest-growing broad industry. Gains have been powered by a recovering housing market, multi-family construction, and work on Intel's D1X plant and subsequent expansion.

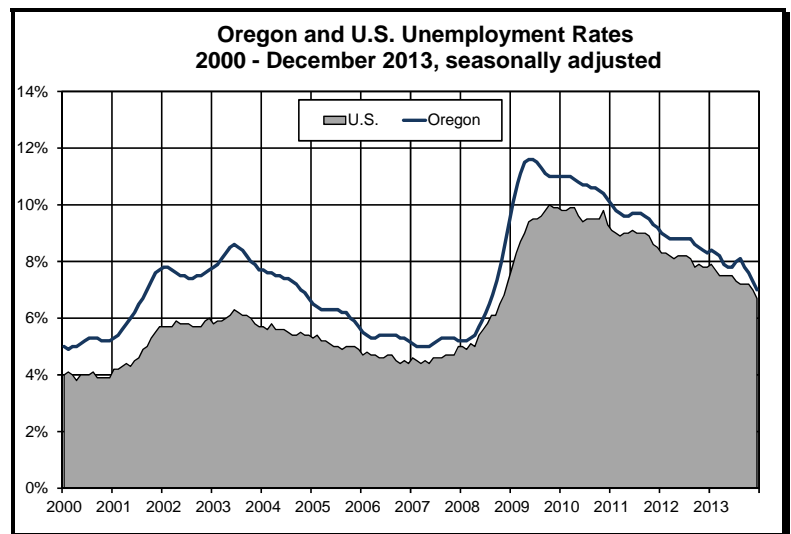
Manufacturers cut jobs in December following a relatively strong November. After outperforming overall job growth during the first few years of the recovery, manufacturing settled into a more modest rate of growth in the second half of 2013.

Over the past year, area employers added 15,500 jobs (+1.5%). All broad industries are at or above year-ago levels with the exception of financial activities (-800 jobs; -1.3%).

### **Oregon Employment Situation – December 2013**

Oregon's seasonally adjusted unemployment rate dropped to 7.0 percent in December from 7.3 percent in November. December marked Oregon's lowest unemployment rate since August 2008, when the rate was 6.7 percent.

In December, Oregon's unemployment rate fell as more people were able to find jobs and there were fewer unemployed. There were nearly 132,000 Oregonians unemployed compared with approximately 160,000 a year earlier. This drop of more than 28,000 individuals since December 2012 was good news for many families in the state and for many sectors of Oregon's economy.



Oregon's job growth in 2013 was much stronger than in the prior two years. In 2013, 37,700 jobs were added, compared with 22,000 in 2012 and 18,400 in 2011.

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In recent months, the pace of expansion has accelerated. Seasonally adjusted payroll employment rose 4,400 in December, following a revised gain of 4,300 in November. Monthly gains have been the norm for some time now, with gains occurring in 13 of the past 15 months.

Job gains in December were concentrated in three of the 11 major industries: professional and business services (+1,600 jobs), government (+1,200) and other services (+900).

Professional and business services grew rapidly in December and throughout last year. The sector gained 7,500 jobs, or 3.8 percent, since December 2012, to grow faster than any major industry other than construction. It reached another all-time high in December, on a seasonally adjusted basis. Each of its three component industries (professional and technical services, management of companies and enterprises, and administrative and waste services) expanded rapidly over the past three years.

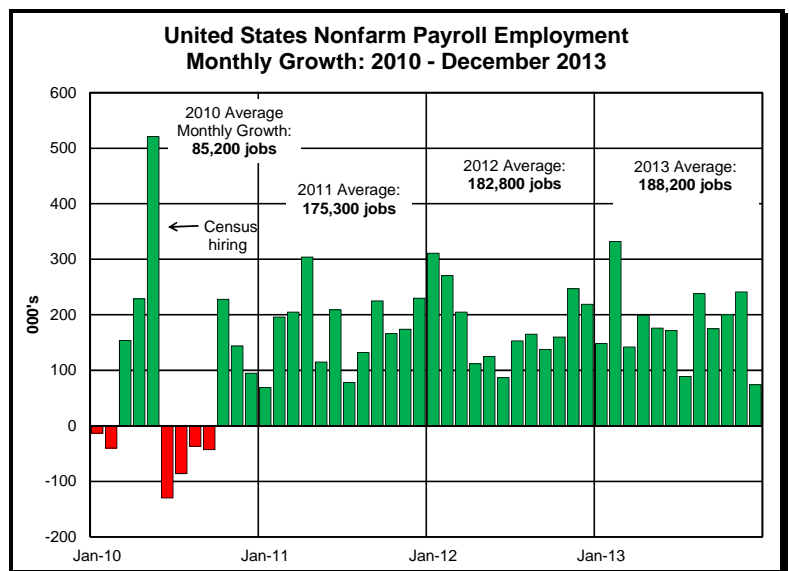
Government cut only 1,700 jobs in December, during a month when a loss of 2,900 is expected due to seasonal factors. State government was close to a record high as it employed 82,700 in December, a gain of 1,200 in 12 months. Meanwhile, local government employed only 183,800 in December, which was its lowest December figure in nine years.

Other services added 400 jobs when a loss of 500 is the normal seasonal movement for December. Employment growth accelerated over the last three years. The industry added more than 2,000 jobs in 2013, which was equal to a growth rate of 3.7 percent.

### **National Employment Situation – December 2013**

The unemployment rate declined from 7.0 percent to 6.7 percent in December, while total nonfarm payroll employment edged up (+74,000), the U.S. Bureau of Labor Statistics reported. Employment rose in retail trade and wholesale trade but was down in information.

The number of unemployed persons declined by 490,000 to 10.4 million in December, and the unemployment rate declined by 0.3 percentage point to 6.7 percent. Over the year, the number of unemployed persons and the unemployment rate were down by 1.9 million and 1.2 percentage points, respectively.

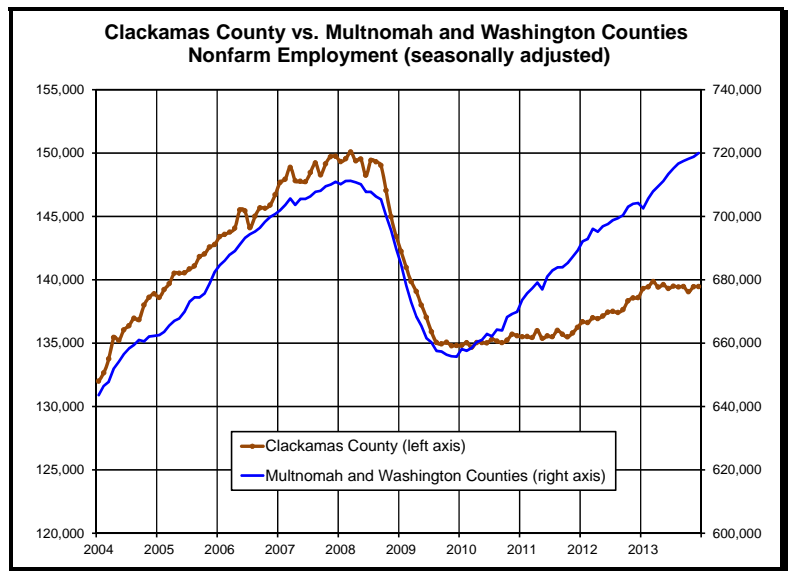


Total nonfarm payroll employment edged up in December (+74,000). In 2013, job growth averaged 182,000 per month, about the same as in 2012 (+183,000 per month). In December, job gains occurred in retail trade and wholesale trade, while employment declined in information.

## Clackamas County's Recovery: Trailing Neighboring Multnomah and Washington Counties

Clackamas County's economy is recovering from the Great Recession. Preliminary estimates indicate that the county has added back about 4,800 jobs since bottoming out in 2010, or about one-third of recessionary losses. Meanwhile, neighboring Multnomah and Washington counties have made a full jobs recovery, and then some. Employment is about 7,000 jobs above pre-recession peaks.

The Portland metropolitan area is a 7-county region for a reason: people regularly commute between these counties for jobs. In fact, about half of Clackamas County's residents cross county lines every morning for work, the majority traveling to Multnomah County. In other words, the 7-county area is a single labor shed. Nonetheless, the difference in job growth between the region's counties has been marked enough for people to question why.



There are likely dozens of reasons why the pace of job growth has differed between the 2 regions. This article briefly discusses some of the major differences in trends.

### Intel, IT, and People

The recovery in Multnomah and Washington counties has been powered by events and demographics largely absent in Clackamas.

#### In Washington County:

- **Intel** has been expanding. They began building their latest plant, D1X, in 2010, creating thousands of construction jobs. D1X wasn't even completed when Intel announced a massive expansion, supposedly larger than the initial plant. Again, thousands of construction workers were employed on site.
- Production at D1X began in 2013, creating hundreds of manufacturing jobs. Manufacturing jobs tend to have a strong multiplier effect: one new job creates an additional one or two jobs elsewhere in the economy.
- **Population growth:** Washington County added more people between 2010 and 2013 than any other county in the state: 21,300 new residents, or double the growth in Clackamas (10,100). Population growth tends to spur job growth.

#### In Multnomah County:

- **Population growth** is a factor as well. Multnomah added nearly as many residents as Washington County between 2010-2013.
- **Professional and business services:**



- Software and computer design-related industries have been growing rapidly throughout the recovery. In particular, computer design is thriving in Multnomah County- many companies choose to locate in downtown Portland in part because it's attractive to their workers. These are high-paying jobs, so there's an added benefit of more money being pumped into the economy and spurring additional job growth.
- Management of companies has performed well during the recovery. It's thousands of jobs above pre-recession levels in Oregon, with about half of this growth taking place in Multnomah County. Clackamas County, however, is home to just five percent of employment in this sector. Additionally, it lost hundreds of jobs due to the closure of Hollywood Video and Joe's.

Additionally, the **housing market** recovery has impacted the metro counties differently. All three counties have recorded a significant increase in housing permits over the past three years. However, Multnomah County has seen an explosion in multi-family activity after years of stagnation combined with strengthening population growth. Clackamas County has seen an uptick as well- permits were back to 2007 levels in 2013. But they're half the level of Washington County and one-third of Multnomah's total permits.

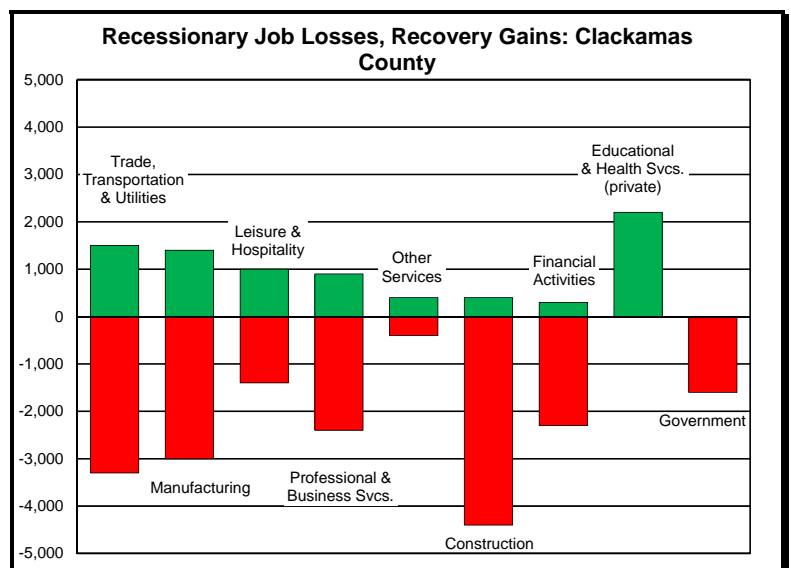
Finally, **public sector** employment is still declining in Clackamas County. It's leveled off in Multnomah County. This is partially due to demographics as well- Clackamas is still experiencing reductions in local schools, more so than neighboring Multnomah and Washington counties. According to the Census, the school-aged (5-19 years old) population in Clackamas County declined by nearly 4,000 people between 2009 and 2012. Meanwhile, Multnomah and Washington saw growth (+6,700).

### The Sky Isn't Falling

Despite differences in industry and demographic trends, Clackamas County is adding jobs. The recovery is underway in all major private sector industries, manufacturing and retail trade in particular. In fact, if Multnomah and Washington counties are removed from statewide numbers, you'd find that Clackamas is adding jobs at about the same pace as the rest of the state.

### Portland City Compared With Oregon

Last month's *Portland Trends* looked at how the greater Portland metro area (7 counties) compares to the state. This prompted follow-up questions about how Portland **city** compared to the rest of the state.



In short, the city of Portland is home to 15 percent of Oregon's population, 24 percent of Oregon's jobs, and 28 percent of statewide payroll. Wages are higher, unemployment is lower, and residents are younger and more educated.

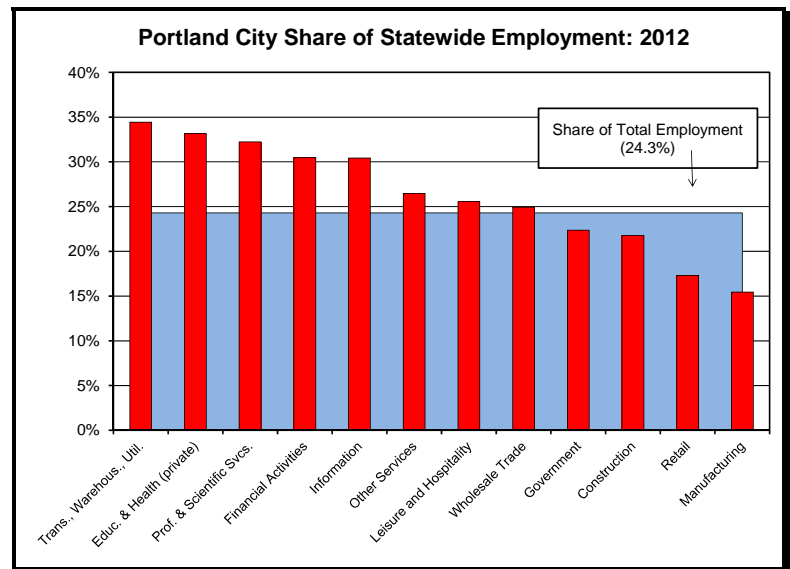
### Economy

Portland city businesses accounted for 387,000 jobs in 2012 (24.3% of statewide) and paid out \$19.8 billion in wages (27.7% of statewide).

The jobless rate topped 11 percent in the summer of 2009 and has since come down to 6.8 percent (2013), lower than the rest of the state (8.0%) and nation (7.4%).

### Industry Mix

The city has proportionately more jobs in private education, transportation, management of companies, financial activities, and professional and scientific services compared to the state as a whole. In fact, Portland is home to over half of statewide employment in air transportation (79.9%; not surprising, given Portland International Airport), performing arts/spectator sports/related industries (51.9%; e.g. Trail Blazers, Portland Opera, etc.), and management of companies (50.5%). The city also has proportionately more jobs in specialty design services (e.g., Ziba), legal services, and architectural/engineering services.



The city is less concentrated in natural resources, manufacturing, and retail trade. It accounts for 15 percent of statewide manufacturing employment, although it has a disproportionately large share of the state's transportation equipment manufacturing (30.7%; e.g., Boeing) and metals manufacturing (28.1%) jobs.

### Industry Wages

City businesses paid an average annual wage of \$51,113 in 2012; 19 percent higher (+\$8,253) than the rest of the state (\$42,860) and 14 percent higher (+\$6,250) than Oregon as a whole (\$44,863).

### Demographics: Younger, More Diverse, More Educated

Portland is home to 592,120 people; 15 percent of Oregon's population. The city's share of statewide population has remained pretty stable over the past three decades, hovering between 15.1 percent (2013) and 15.4 percent (1990).

- 
- *Younger*  
Portland's median age is 36.0 years compared with 38.7 years statewide (2012).
  - *More Diverse*  
Nearly one-quarter of the city's population identified as a race other than, or in addition to, White. This is compared with 14 percent for the rest of the state. Portland city is home to:
    - 53.5 percent of Oregon's Black population,
    - 29.5 percent of the state's Asian population, and
    - 9.9 percent of the state's Hispanic population
  - *More Highly Educated*  
One half of the city's residents (25 years and older) hold an Associate degree or higher compared with 35 percent across the rest of Oregon.
  - *Higher Labor Force Participation*  
The city's labor force participation rate is nearly 70 percent compared with 61.6 percent across the rest of the state.

#### Female Workforce: More Women in the Workforce, and Earning Higher Wages

- *Higher Labor Force Participation*  
The city's labor force participation rate among women is 65.5 percent compared with 57.0 percent across the rest of the state.
- *Higher Wages*  
Women living in Portland earn 112 percent of the statewide median for women (\$41,388 vs. \$36,840).
- *Different Occupational Choices*  
Female residents are more likely to work in management, production, law enforcement, community social service, and life/physical/social science occupations compared with men.

#### Transportation to Work: Relatively Fewer Cars

One-quarter of city residents leave their cars at home, commuting by bike, foot, public transportation, or by some other (non-car) means. This is three times the rate seen across the rest of the state (7.3%) and over double that of Oregon as whole (11.7%).

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## Around the Region

*A listing of employment-related events making recent news*

- **Ross Dress for Less** will open a third **Vancouver** store in the spring. *The Columbian, 12/26/2013*
- Construction will begin in February on an 83-room **Candlewood Suites Hotel** in **southeast Vancouver**. *The Columbian, 12/19/2013*
- **Starbucks, The UPS Store, Vivid Nails, and Pacific Dental** will open at Parkway Village at **Sherwood** next fall. *Portland Business Journal, 12/19/2013*
- **New Seasons Market** will open in **southeast Portland's** Woodstock neighborhood in the summer of 2015. *Portland Business Journal, 1/6/2014*
- **Tualatin Urgent Care** will open at the Nyberg Retail Center in **Tualatin**. *Portland Business Journal, 12/23/2013*
- **Albertsons** will close stores in **east and northeast Vancouver**. They employ 55 and 77 people, respectively. *The Columbian, 1/13/2014*
- **Natural Grocers** will open a store in **Gresham** in March. *The Oregonian, 1/10/2014*
- Construction will begin on Kruse Village, a retail center in **Lake Oswego**, early this year and open in the spring of 2015. Tenants will include **Emergency Care Center and Comprehensive Pain Clinic of Portland, Ava Roasteria, Tavern on Kruse, Jimmy John's Gourmet Sandwiches, Strada Italian Cuisine, Wow! Burger Express, MOD Superfast Pizza, Tan Republic, and Vida Nails**. *Portland Business Journal, 1/9/2014*
- Seventy workers at **SP Fiber Technologies** in **Newberg** were laid off. The company plans to convert a newsprint machine to one that will produce packing material. Some of the workers may be rehired when the new machine becomes operational in about six months. *The Newberg Graphic, 1/22/2014*
- **Glenn Walters Nursery** in **Cornelius** laid off 118 employees after losing its largest customer. *The Oregonian, 1/22/2014*
- **Trailhead Credit Union** opened in a branch in **north Portland**. *Portland Business Journal, 1/23/2014*
- Legacy Meridian Park Medical Center in **Tualatin** opened **The Chest Pain Center**. *Wilsonville Spokesman, 1/22/2014*
- **NW Innovation Works LLC** plans to build a methanol manufacturing facility at the Port Westward industrial park north of **Clatskanie**. It will export methanol directly to the city government of Dalian, China for use in plastics manufacturing and expects to employ about 120 workers. *The South County Spotlight, 1/22/2014*

## Portland-Vancouver-Hillsboro MSA Labor Force and Industry Employment

	---Change from---				
	December 2013	November 2013	December 2012	November 2013	December 2012
<b>LABOR FORCE STATUS</b>					
Civilian Labor Force	1,164,800	1,172,700	1,178,500	-7,900	-13,700
Unemployed	72,400	73,500	87,400	-1,100	-15,000
Unemployment Rate	6.2%	6.3%	7.4%		
Unemployment Rate, seasonally adjusted	6.6%	6.8%	7.7%		
Total Employed	1,092,500	1,099,200	1,091,100	-6,700	1,400
<b>NONFARM PAYROLL EMPLOYMENT</b>					
<b>Total nonfarm</b>	<b>1,039,400</b>	<b>1,040,700</b>	<b>1,023,500</b>	<b>-1,300</b>	<b>15,500</b>
<b>Total nonfarm, seasonally adjusted</b>	<b>1,029,400</b>	<b>1,027,600</b>	<b>1,013,700</b>	<b>1,800</b>	<b>15,700</b>
<b>Total private</b>	<b>894,000</b>	<b>894,100</b>	<b>878,600</b>	<b>-100</b>	<b>15,400</b>
<b>Mining and logging</b>	<b>900</b>	<b>900</b>	<b>1,000</b>	<b>0</b>	<b>-100</b>
<b>Construction</b>	<b>51,700</b>	<b>52,700</b>	<b>46,900</b>	<b>-1,000</b>	<b>4,800</b>
Construction of buildings	12,000	12,400	11,000	-400	1,000
Residential building construction	6,200	6,400	5,700	-200	500
Nonresidential building construction	5,800	6,000	5,300	-200	500
Heavy and civil engineering construction	4,800	5,000	5,000	-200	-200
Specialty trade contractors	34,900	35,300	30,900	-400	4,000
<b>Manufacturing</b>	<b>115,900</b>	<b>116,500</b>	<b>114,400</b>	<b>-600</b>	<b>1,500</b>
Durable goods	86,300	86,400	86,300	-100	0
Wood product manufacturing	3,500	3,500	3,500	0	0
Primary metal manufacturing	6,400	6,400	6,200	0	200
Fabricated metal product manufacturing	12,700	12,900	12,600	-200	100
Machinery manufacturing	8,600	8,600	8,000	0	600
Computer and electronic product manufacturing	35,300	35,200	35,100	100	200
Semiconductor and electronic component mfg.	28,000	28,000	27,500	0	500
Electronic instrument manufacturing	4,700	4,800	4,900	-100	-200
Transportation equipment manufacturing	6,900	6,700	7,400	200	-500
Nondurable goods	29,600	30,100	28,100	-500	1,500
Food manufacturing	11,400	11,600	10,300	-200	1,100
Paper manufacturing	3,200	3,200	3,300	0	-100
<b>Trade, transportation, and utilities</b>	<b>204,500</b>	<b>202,900</b>	<b>201,600</b>	<b>1,600</b>	<b>2,900</b>
Wholesale trade	58,200	58,200	56,700	0	1,500
Merchant wholesalers, durable goods	24,500	24,400	24,500	100	0
Merchant wholesalers, nondurable goods	23,200	23,200	22,200	0	1,000
Electronic markets and agents and brokers	10,500	10,600	10,000	-100	500
Retail trade	111,300	110,600	110,000	700	1,300
Motor vehicle and parts dealers	11,600	11,600	11,400	0	200
Food and beverage stores	22,500	22,700	21,600	-200	900
Clothing and clothing accessories stores	11,800	11,600	11,800	200	0
General merchandise stores	24,300	23,600	24,100	700	200
Transportation, warehousing, and utilities	35,000	34,100	34,900	900	100
Utilities	2,300	2,300	2,300	0	0
Transportation and Warehousing	32,700	31,800	32,600	900	100
Air transportation	3,300	3,300	3,300	0	0
Truck transportation	10,200	10,200	9,800	0	400
Couriers and messengers	5,800	4,900	5,400	900	400
Warehousing and storage	3,300	3,400	3,200	-100	100
<b>Information</b>	<b>23,600</b>	<b>23,300</b>	<b>23,000</b>	<b>300</b>	<b>600</b>
Publishing industries, except internet	8,800	8,900	8,700	-100	100
Software publishers	6,600	6,500	6,500	100	100
Telecommunications	6,000	5,900	5,700	100	300

## Nonfarm Payroll Employment (continued)

	December 2013	November 2013	December 2012	---Change from---	
				November 2013	December 2012
<b>Financial activities</b>	<b>62,000</b>	<b>61,600</b>	<b>62,800</b>	<b>400</b>	<b>-800</b>
Finance and insurance	40,100	39,800	41,100	300	-1,000
Credit intermediation and related activities	19,000	19,000	19,200	0	-200
Insurance carriers and related activities	17,300	17,300	17,600	0	-300
Real estate and rental and leasing	21,900	21,800	21,700	100	200
<b>Professional and business services</b>	<b>145,600</b>	<b>146,100</b>	<b>141,100</b>	<b>-500</b>	<b>4,500</b>
Professional and technical services	62,300	62,200	59,500	100	2,800
Architectural and engineering services	11,200	11,200	10,900	0	300
Computer systems design and related services	11,600	11,600	10,600	0	1,000
Management of companies and enterprises	25,500	25,400	24,100	100	1,400
Administrative and waste services	57,800	58,500	57,500	-700	300
Administrative and support services	54,800	55,600	54,700	-800	100
Employment services	24,300	24,500	22,200	-200	2,100
Business support services	9,400	9,300	9,300	100	100
Services to buildings and dwellings	12,100	12,800	12,600	-700	-500
<b>Educational and health services</b>	<b>150,100</b>	<b>150,500</b>	<b>150,000</b>	<b>-400</b>	<b>100</b>
Educational services	27,100	27,700	28,900	-600	-1,800
Colleges and universities	14,600	14,900	15,000	-300	-400
Health care and social assistance	123,000	122,800	121,100	200	1,900
Ambulatory health care services	48,300	48,100	47,200	200	1,100
Hospitals	28,700	28,900	29,000	-200	-300
Nursing and residential care facilities	24,900	24,800	24,500	100	400
Social assistance	21,100	21,000	20,400	100	700
<b>Leisure and hospitality</b>	<b>101,500</b>	<b>101,800</b>	<b>100,700</b>	<b>-300</b>	<b>800</b>
Arts, entertainment, and recreation	13,000	12,800	13,600	200	-600
Amusement, gambling, and recreation	9,700	9,700	9,800	0	-100
Accommodation and food services	88,500	89,000	87,100	-500	1,400
Accommodation	9,300	9,300	9,300	0	0
Food services and drinking places	79,200	79,700	77,800	-500	1,400
Full-service restaurants	38,900	38,600	37,000	300	1,900
Limited-service eating places	31,700	32,500	32,300	-800	-600
<b>Other services</b>	<b>38,200</b>	<b>37,800</b>	<b>36,700</b>	<b>400</b>	<b>1,500</b>
Membership associations and organizations	17,600	17,600	16,200	0	1,400
<b>Government</b>	<b>145,400</b>	<b>146,600</b>	<b>145,300</b>	<b>-1,200</b>	<b>100</b>
Federal government	18,000	17,800	18,000	200	0
State government	23,300	23,400	23,000	-100	300
State education	8,900	8,900	8,700	0	200
Local government	104,100	105,400	104,300	-1,300	-200
Local education	56,600	57,800	57,400	-1,200	-800
Labor 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 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.

"Mining and logging" formerly titled "Natural resources and mining". The definition is the same.

The Portland-Vancouver-Hillsboro metropolitan area includes Clackamas, Columbia, Multnomah, Washington, and Yamhill counties in Oregon, and Clark and Skamania counties in Washington State.

## Resident Labor Force and Unemployment for Regions Within the Portland-Vancouver-Hillsboro MSA

	December 2013	November 2013	December 2012	-Change From-	
				November 2013	December 2012
<b>Portland-Vancouver-Hillsboro MSA</b>					
Civilian labor force	1,164,800	1,172,700	1,178,500	-7,900	-13,700
Unemployed	72,400	73,500	87,400	-1,100	-15,000
Unemployment rate	6.2	6.3	7.4		
Unemployment rate, seasonally adjusted	6.6	6.8	7.7		
Employed	1,092,500	1,099,200	1,091,100	-6,700	1,400
<b>Oregon portion of the MSA</b>					
Civilian Labor Force	954,900	958,800	964,000	-3,900	-9,100
Unemployed	56,800	56,000	69,400	800	-12,600
Unemployment rate (not seasonally adjusted)	5.9	5.8	7.2		
Total Employed	898,100	902,800	894,600	-4,700	3,500
<b>Clackamas County</b>					
Civilian Labor Force	196,000	196,900	198,200	-900	-2,200
Unemployed	11,800	11,600	14,700	200	-2,900
Unemployment rate	6.0	5.9	7.4		
Unemployment rate, seasonally adjusted	6.3	6.5	7.6		
Total Employed	184,300	185,200	183,500	-900	800
<b>Columbia County</b>					
Civilian Labor Force	23,710	23,800	24,050	-90	-340
Unemployed	1,750	1,720	2,170	30	-420
Unemployment rate	7.4	7.2	9.0		
Unemployment rate, seasonally adjusted	7.5	7.7	9.1		
Total Employed	21,960	22,080	21,880	-120	80
<b>Multnomah County</b>					
Civilian Labor Force	397,900	399,600	401,700	-1,700	-3,800
Unemployed	24,000	23,800	29,200	200	-5,200
Unemployment rate	6.0	6.0	7.3		
Unemployment rate, seasonally adjusted	6.3	6.4	7.6		
Total Employed	373,900	375,800	372,400	-1,900	1,500
<b>Washington County</b>					
Civilian Labor Force	289,500	290,600	291,800	-1,100	-2,300
Unemployed	16,100	15,800	19,500	300	-3,400
Unemployment rate	5.6	5.4	6.7		
Unemployment rate, seasonally adjusted	5.7	5.8	6.9		
Total Employed	273,400	274,800	272,400	-1,400	1,000
<b>Yamhill County</b>					
Civilian Labor Force	47,730	47,850	48,250	-120	-520
Unemployed	3,150	3,040	3,850	110	-700
Unemployment rate	6.6	6.3	8.0		
Unemployment rate, seasonally adjusted	6.6	6.8	8.1		
Total Employed	44,580	44,810	44,410	-230	170
<b>Washington portion of the MSA (Clark and Skamania counties)</b>					
Civilian Labor Force	209,900	213,900	214,600	-4,000	-4,700
Unemployed	15,600	17,500	18,000	-1,900	-2,400
Percent of Labor Force	7.4	8.2	8.4		
Total Employed	194,300	196,400	196,500	-2,100	-2,200

Components may not sum exactly to totals due to rounding.

Estimates of labor force and unemployment for MSA components are based in part on the most recent population estimates and Unemployment Insurance claims data.





February 2014

**Economic Indicators**  
 Unemployment Rates

Jackson	Raw	Seasonally
		Adjusted
December 2013	8.3	9.1
Month ago	8.1	9.3
Year Ago	9.6	10.4

Josephine	Raw	Seasonally
		Adjusted
December 2013	9.6	9.9
Month ago	9.5	10.2
Year Ago	11.3	11.6

Note: seasonally adjusted rates for areas other than the United States and Oregon are not official Bureau of Labor Statistics series

Oregon	Raw	Seasonally
		Adjusted
December 2013	6.9	7.0
Month Ago	6.7	7.3
Year Ago	8.2	8.3

United States	Raw	Seasonally
		Adjusted
December 2013	6.5	6.7
Month Ago	6.6	7.0
Year Ago	7.6	7.9

**Residential Building Permits**

	Dec. 13	Dec. 12
	Jackson	40
Josephine	7	6

**Consumer Price Index**  
 All Urban Consumers  
 Yearly Change

United States	
Dec 2012 to Dec 2013	1.5%
2013 Annual Average	1.5%

**Portland-Salem, OR-WA**

January-June 2013	2.2%
* percent change from the same 6-month period in previous year	
2012 Annual Average	2.3%

Source: Bureau of Labor Statistics, U.S. Census Bureau

**This month's issue:**

- Monthly employment analysis – Oregon, Jackson and Josephine counties
- Published business news from around the region
- Conference Board's Help Wanted Online Index: Real-time labor market information

## Jackson County's Job Growth Fastest Among Metro Areas over Past Year

In the Medford MSA (Jackson County), total payroll employment decreased by 70 jobs in December. Unemployment rates continue to drift lower, with December's seasonally adjusted figure at 9.1 percent, down from 9.3 percent in November.

In December, construction continued its seasonal reductions, dropping 150 jobs. Leisure and hospitality employment shed 50 jobs over the month, with overall tourism activity near seasonal lows. Small declines were estimated in mining and logging (-30) and financial activities (-20). Industries posting over-the-month employment gains were retail trade (+280), transportation, warehousing and utilities (+20), professional and business services (+50), and health care and social assistance (+60).

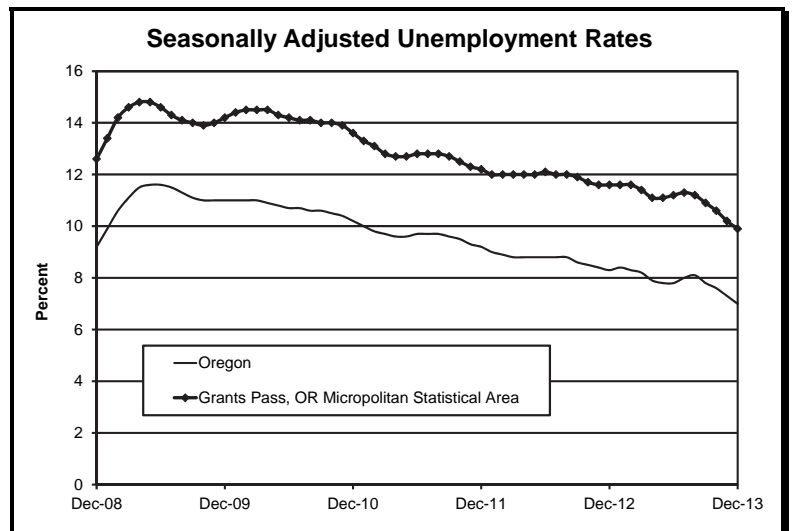
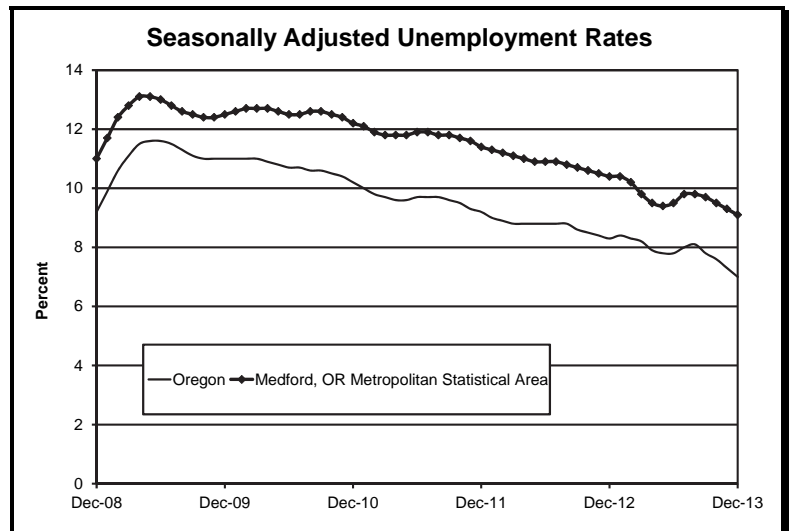
**Labor Trends by Email**

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Government employment posted a net loss of 160 jobs over the month with a decline of 120 local education jobs and losses totaling 20 in state education. Those declines were slightly offset by a gain of 30 federal government jobs.

Total payroll employment rose by 2,120 over the past 12 months for a gain of 2.7 percent. Over the past year, employment gains occurred in nearly all private sector industries, with exceptions including information (-50), health care and social assistance (-80), and construction (-40).

Industries showing the largest number of jobs added were manufacturing (+330), retail trade (+1,040), transportation, warehousing and utilities (+210), leisure and hospitality (+510), and professional and business services (+60). Smaller increases were also estimated in mining and logging (+40), wholesale trade (+50), and financial activities (+30). Government employment had a net decline of 50 jobs over the year. State government education rose by 80 over the year, while federal government shed 50 jobs. Total local government employment declined by 20, despite an increase of 60 in local government education.



## Health Care, Manufacturing, and Retail Trade Drive Over-the-Year Josephine County Employment Gains

Josephine County total payroll employment fell by 100 jobs in December. Construction employment fell by 60 and shows little change from the year-ago total. Food and beverage stores lost 20 jobs while overall retail trade employment was unchanged over the month. Health care and social assistance had the largest gain among published industries in December, gaining 30 jobs. Leisure and hospitality continued its typical seasonal retrenchment, down by 30 jobs from November figures.

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Government employment posted a net decline of 50 jobs in December, with most of the decline in the local education category. Josephine County's seasonally adjusted unemployment rate was 9.9 percent in December, the first month it has been below 10 percent since September 2008, when the rate was also 9.9 percent.

Private sector industries added 200 jobs since December 2012. Those gains were offset by losses in public sector jobs totaling 130, for a net gain in nonfarm payroll employment of 70 jobs over the year. The largest job growth occurred in retail trade (+60), health care and social assistance (+150), and manufacturing (+60). Professional and business services added 30 jobs over the year.

Wood product manufacturing employment fell by 30 over the year. Other industries losing employment since December 2012 included leisure and hospitality (-40), other services (-20), state government (-50), and local government education (-90)

## Local Business Briefs

*Material gathered from published, nonconfidential sources.*

Brookings-based **C&K Market Inc.** laid off about 45 employees at its corporate offices in **Brookings** and **Medford**. *Curry Coastal Pilot, 1/8/2014*

**38 Central**, a restaurant in downtown **Medford**, closed. *Mail Tribune, 12/24/2013*

**MacLevin's Restaurant** in **Jacksonville** will close. *KDRV, 12/26/2013*

**Campus Grill** opened in **Ashland**. It offers hot dogs, burgers, and fries. *Ashland Daily Tidings, 1/2/2014*

**Rogue Air Trampoline Park** will open next month in **Medford**. It will employ 25 to 30 people. *Mail Tribune, 1/7/2014*

**Starbucks** will open next to the Lithia Motors headquarters in downtown **Medford** this spring. *Mail Tribune, 1/7/2014*

**Ooh La La Boutique & Spa** will open in downtown **Medford**. It will offer clothing, vintage jewelry, high-end furniture, home décor, and antiques. *Mail Tribune, 1/9/2014*

**Sawyer Paddles & Oars** in **Talent** anticipates adding 40 to 60 workers in the next five years. *Mail Tribune, 1/9/2014*

**White Dental Studio** will open in **Ashland**. *Mail Tribune, 1/11/2014*

**Alex's Plaza Restaurant and Bar** in **Ashland** closed. *Mail Tribune, 1/13/2014*

Flakeboard America Ltd., will buy three **SierraPine** particleboard plants, including a medium density fiberboard plant in **Medford** that employs approximately 130 people. *Mail Tribune, 1/15/2014*

**Marigold's and JDUB's** restaurant opened at Cobblestone Village in **Medford**. *Mail Tribune, 1/16/2014*

**Togo's**, a sub sandwich shop on Biddle Road in **Medford**, will close. Most employees will move to the Togo's Harry and David Village Restaurant. *KDRV, 1/23/2014*

**Organic Nation**, a producer of vodka and gin in **Ashland**, closed. *Mail Tribune, 1/24/2014*

The **Salvation Army** store in southeast **Grants Pass** closed. The organization recently opened a new store on the grounds of its local donation center and food bank. *Grants Pass Daily Courier, 1/5/2014*

**Champion Outlet**, a sports apparel store in **Grants Pass**, has become **Uniform Emporium: Scrubs, Etc.**, offering scrubs for health care workers. *Grants Pass Daily Courier, 1/5/2014*

**Expert Tire** in **Grants Pass** closed. *Grants Pass Daily Courier, 1/5/2014*

**Photo Den**, a camera and electronics store in **Grants Pass** that was planning to close, will stay open. It will continue to operate with the same staff. *Grants Pass Daily Courier, 1/10/2014*

The R-Haus Fine Dining and Lounge in **Grants Pass** is being updated and will reopen with new owners and a new name – **R-Haus Restaurant and Sports Bar**. *Grants Pass Daily Courier, 1/12/2014*

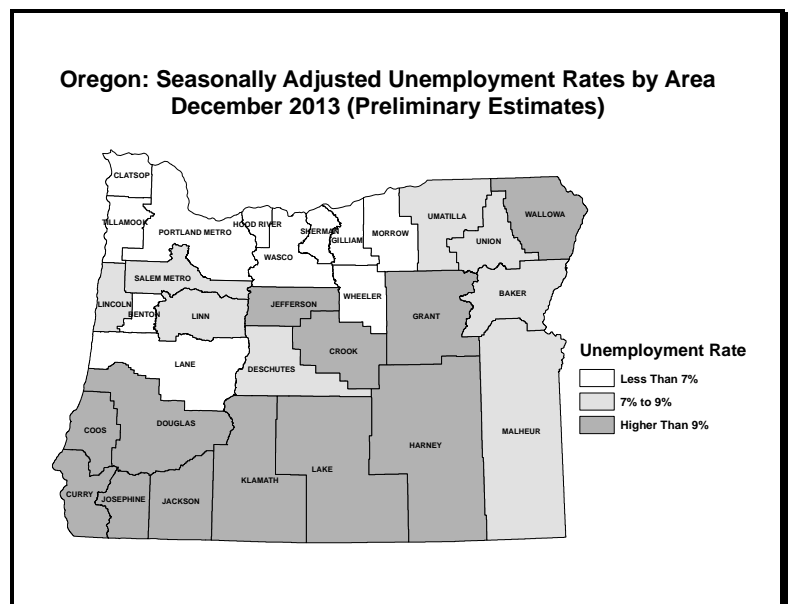
**Heavenly Sweets Bakery and Deli** opened in **Grants Pass**. *Grants Pass Daily Courier, 1/12/2014*

**Rogue Valley Mobile Phlebotomy** opened. It offers in-home blood draws to housebound patients in **Josephine County**. *Grants Pass Daily Courier, 1/22/2014*

## Oregon Trends

Oregon's seasonally adjusted unemployment rate dropped to 7.0 percent in December from 7.3 percent in November. December marked Oregon's lowest unemployment rate since August 2008, when the rate was 6.7 percent.

In December, Oregon's unemployment rate fell as more people were able to find jobs and there were fewer unemployed. There were nearly 132,000 Oregonians unemployed compared with approximately 160,000 a year earlier. This drop of more than 28,000 individuals since December 2012 was good news for many families in the state and for many sectors of Oregon's economy.



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Oregon's job growth in 2013 was much stronger than in the prior two years. In 2013, 37,700 jobs were added, compared with 22,000 in 2012 and 18,400 in 2011.

In recent months, the pace of expansion has accelerated. Seasonally adjusted payroll employment rose 4,400 in December, following a revised gain of 4,300 in November. Monthly gains have been the norm for some time now, with gains occurring in 13 of the past 15 months.

Job gains in December were concentrated in three of the 11 major industries: professional and business services (+1,600 jobs), government (+1,200) and other services (+900).

Professional and business services grew rapidly in December and throughout last year. The sector gained 7,500 jobs, or 3.8 percent, since December 2012, to grow faster than any major industry other than construction. It reached another all-time high in December, on a seasonally adjusted basis. Each of its three component industries (professional and technical services, management of companies and enterprises, and administrative and waste services) expanded rapidly over the past three years.

Government cut only 1,700 jobs in December, during a month when a loss of 2,900 is expected due to seasonal factors. State government was close to a record high as it employed 82,700 in December, a gain of 1,200 in 12 months. Meanwhile, local government employed only 183,800 in December, which was its lowest December figure in nine years.

Other services added 400 jobs when a loss of 500 is the normal seasonal movement for December. Employment growth accelerated over the last three years. The industry added more than 2,000 jobs in 2013, which was equal to a growth rate of 3.7 percent.

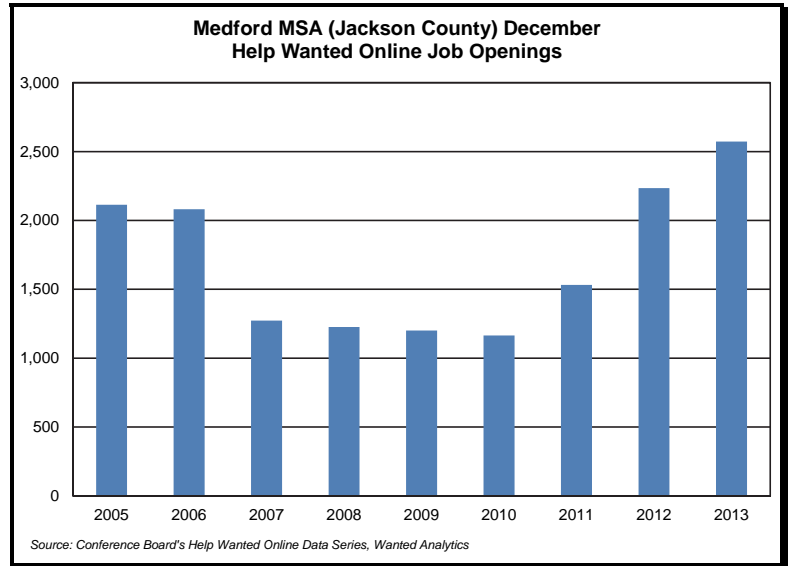
## **Conference Board's Help Wanted OnLine<sup>®</sup> Index Shows Growing Demand for Labor in the Rogue Valley**

The Conference Board Help Wanted OnLine<sup>®</sup> (HWOL) index provides a gauge of demand for labor. Data are compiled each month on aggregate job listings from online job boards for Oregon and its counties. This series began in 2005 and allows us to compare trends in posted online job openings through the Great Recession and up to December 2013. While the Oregon Employment Department produces monthly estimates of job growth by industry, this information really doesn't convey which actual occupations are seeing the greatest demand. The HWOL data collects job listings by specific occupation. This enables analysis in nearly real-time on demand for labor by occupation group and specific job title for Oregon and its counties.

As with most data, there are some caveats in using these data over time. If businesses are increasing their utilization of online job postings over time, then this would represent more of a structural shift in how employers are posting job openings rather than a perfect indicator that demand for labor is increasing. This may be the case for some areas, such as on the South Coast where trends in online job postings in recent years far outpaced actual employment growth. Also, just because an employer posts a job opening does not mean that all openings are being filled. We have seen similar trends in the Bureau of Labor Statistics Job Opening and Labor Turnover Survey (JOLTS). Following the Great Recession, JOLTS data show that the number of job openings has risen notably faster than the number of actual new hires. Employers may be testing the waters to increase their applicant pool or are unable to find workers with the required skills or experience.

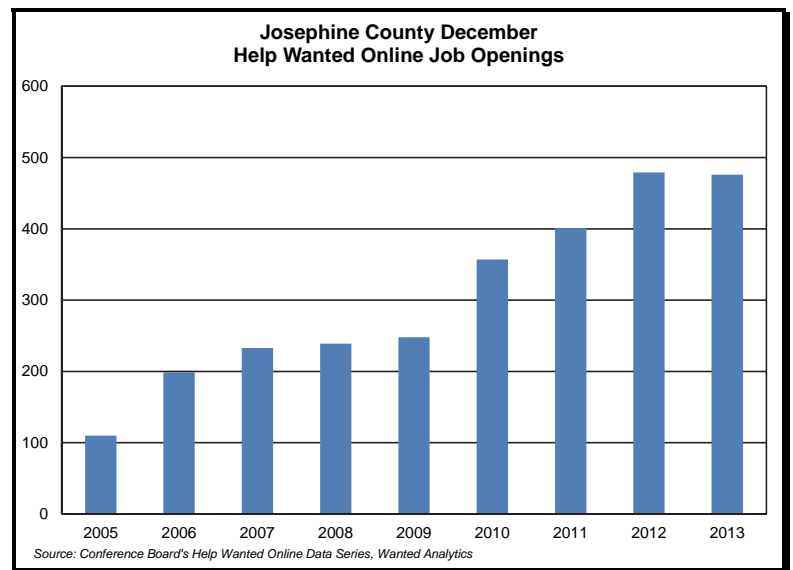
## Trends in Rogue Valley Show Steady Gains on Online Job Postings

In Jackson County, comparing December total online job postings over time shows that the Great Recession had a dramatic impact, as total advertised job openings fell from 2,115 in December 2005 to 1,164 in December 2010, a decline of 45 percent. Since that low-point, online job postings rose steadily, with gains in each of the next three years. Over the most recent year, December online openings rose by 15 percent to reach 2,573. Following the series low in 2010, there were over 1,400 more job openings posted in December 2013. (Graph 1)



Graph 1

Josephine County displays a somewhat different trend than neighboring Jackson County. From 2009 to 2012, the number of job postings roughly doubled, but doesn't show much change over the past year (Graph 2). Unlike in Jackson County, the recession's impact is not apparent in this graph. This may be a case of more employers migrating to online postings from 2005 to 2013, rather than steadily increasing overall job listings over that time. This graph doesn't fit the deep recession scenario that has played out in most other economic and labor market data for the county, so it would be wise to use caution in equating these data as a perfect representation of labor demand for the region.



Graph 2

### December Online Job Postings by Occupational Group

In Jackson County, health care practitioners and technical occupations dominated the broad occupational group list, with nearly 700 job openings posted. Health care support also ranked high on the list with more than 200 online openings. Sales and transportation/material moving occupational groups also had many online job openings. In addition to usually having many openings posted, seasonal trends may also impact these categories with activity from the holiday shopping season. Even during the slower season for tourism, there were still more than 200 online openings for food preparation and serving-related jobs in December. (Graph 3).

Josephine County's top occupational group was also health care practitioners and technical occupations. Its dominance over the other broad occupational groups was even more pronounced than in Jackson County. Office and administrative support occupations and sales and related occupations had more than 50 online openings in December. Management-related online job openings were numerous in Josephine County, with nearly 30 openings posted (Graph 4). These data show that even in a county that has not seen as rapid of a recovery from the Great Recession as many areas of the state, there are still many job openings posted online across a diverse range of broad occupational categories.

### Drilling Down to the Details: Jobs With the Most Online Openings

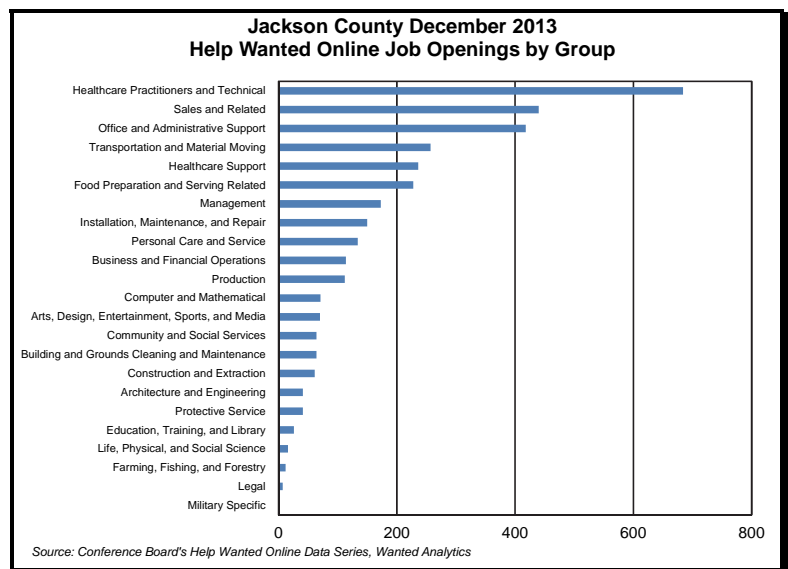
So far we have examined overall trends in online job openings, and openings by broad group. Now let's look at the specifics. What detailed occupations had the most online openings in December 2013?

#### Jackson County

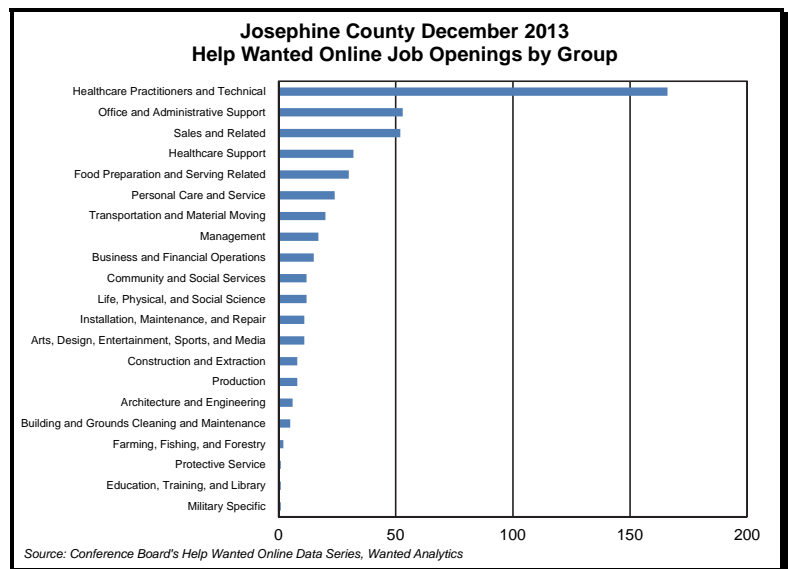
Is it a surprise that the registered nurses occupation is at the top of the ranked list in Jackson County? With nearly 300 positions posted online, demand for this occupation appears strong. Other health care-related occupations with many online openings were occupational therapists, personal care aides, home health aides, critical care nurses, and medical and nursing assistants. Other occupational titles with many job openings posted online were truck drivers, retail salespersons, customer service representatives, and various supervisory positions (Table 1).

#### Josephine County

Detailed occupational online job postings were also dominated by health care jobs in Josephine County in December, but occupational therapists edged out registered nurses for the top spot. Others on the top list of the most online openings related to health care were physical therapists, personal care aides, family and general practitioners, nursing assistants (CNA's), medical assistants, and phlebotomists. As was the case looking at broader occupational categories, the detailed occupational



Graph 3



Graph 4

**Table 1**

<b>Top 20 December 2013 Help Wanted Online Job Openings in Jackson County</b>	
Registered Nurses	286
Heavy and Tractor-Trailer Truck Drivers	124
Retail Salespersons	113
Occupational Therapists	89
Personal Care Aides	84
Customer Service Representatives	75
First-Line Supervisors of Food Preparation and Serving Workers	64
First-Line Supervisors of Retail Sales Workers	64
Home Health Aides	58
Critical Care Nurses	57
First-Line Supervisors of Office and Administrative Support Workers	57
Medical Assistants	56
Nursing Assistants	55
Sales Representatives, Wholesale and Manufacturing, Except Technical and Scientific Products	51
Physical Therapists	49
Medical and Health Services Managers	37
Cooks, Restaurant	35
Maids and Housekeeping Cleaners	35
Sales Agents, Financial Services	35
First-Line Supervisors of Production and Operating Workers	34

*Source: Conference Board's Help Wanted Online Data Series, Wanted Analytics*

data show the unbalanced trend in online openings heavily weighted toward health care in Josephine County. Outside of healthcare-related online openings, retail sales persons, food preparation and service worker supervisors, and truck drivers had job openings listed online in Josephine County.

These fairly new and detailed data provide another piece of the labor market information puzzle that helps paint a more complete picture of which occupational groups and specific occupations are seeing the greatest number of job openings posted. Granted, these are “online” postings only and do not capture every job opening that is posted. We might assume looking at the growth trends in online posting numbers over time, more employers are utilizing the internet and online job boards as one tool in their recruitment toolkit. Analyzing these data provides reasonably good information on the greatest demand for labor by occupation, in nearly real-time.



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**Table 2**

<b>Top 20 December 2013 Help Wanted Online Job Openings in Josephine County</b>	
Occupational Therapists	43
Registered Nurses	32
Physical Therapists	31
First-Line Supervisors of Food Preparation and Serving Workers	17
Retail Salespersons	17
Family and General Practitioners	15
Personal Care Aides	13
Nursing Assistants	9
Heavy and Tractor-Trailer Truck Drivers	9
Merchandise Displayers and Window Trimmers	8
Speech-Language Pathologists	8
Medical Assistants	8
First-Line Supervisors of Retail Sales Workers	8
Customer Service Representatives	7
Marketing Managers	6
Medical and Health Services Managers	6
Phlebotomists	6
Sales Representatives, Wholesale and Manufacturing, Except Technical and Scientific Products	6
Tellers	6
Park Naturalists	5

*Source: Conference Board's Help Wanted Online Data Series, Wanted Analytics*

**Oregon Current Labor Force and Industry Employment**  
**MEDFORD-ASHLAND MSA (JACKSON COUNTY)**

<b>Labor Force Status</b>	Dec	Nov	Dec	-Change from-	
	2013	2013	2012	Nov 2013	Dec 2012
Civilian Labor Force	96,704	97,620	100,256	-916	-3,552
Unemployed	8,009	7,923	9,631	86	-1,622
Unemployment Rate	8.3%	8.1%	9.6%	0.2	-1.3
Seasonally Adjusted Unemployment Rate	9.1%	9.3%	10.4%	-0.2	-1.3
Employed	88,695	89,697	90,625	-1,002	-1,930
<b>Nonfarm Payroll Employment</b>	Dec	Nov	Dec	-Change from-	
	2013	2013	2012	Nov 2013	Dec 2012
Total Nonfarm Payroll Employment	79,900	79,970	77,780	-70	2,120
Total private	67,770	67,680	65,600	90	2,170
Mining and logging	360	390	320	-30	40
Construction	2,850	3,000	2,890	-150	-40
Manufacturing	7,200	7,240	6,870	-40	330
Trade, transportation, and utilities	20,090	19,780	18,790	310	1,300
Wholesale trade	2,120	2,110	2,070	10	50
Retail trade	14,870	14,590	13,830	280	1,040
Transportation, warehousing, and utilities	3,100	3,080	2,890	20	210
Information	1,490	1,490	1,540	0	-50
Financial activities	3,610	3,630	3,580	-20	30
Professional and business services	6,630	6,580	6,570	50	60
Educational and health services	13,890	13,890	13,920	0	-30
Health care and social assistance	13,090	13,030	13,170	60	-80
Health care	11,620	11,570	11,640	50	-20
Leisure and hospitality	9,210	9,260	8,700	-50	510
Accommodation and food services	8,040	8,140	7,550	-100	490
Other services	2,440	2,420	2,420	20	20
Government	12,130	12,290	12,180	-160	-50
Federal government	1,630	1,600	1,680	30	-50
State government	2,940	2,960	2,920	-20	20
State education	1,540	1,560	1,460	-20	80
Local government	7,560	7,730	7,580	-170	-20
Local education	5,050	5,170	4,990	-120	60
Labor/Management Disputants	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.

**OREGON CURRENT LABOR FORCE AND INDUSTRY EMPLOYMENT  
JOSEPHINE COUNTY**

<b>Labor Force Status</b>	Dec. 2013	Nov. 2013	Dec. 2012	-Change from-	
				Nov. 2013	Dec. 2012
Civilian Labor Force	32,350	32,635	33,737	-285	-1,387
Unemployed	3,105	3,090	3,811	15	-706
Unemployment rate	9.6%	9.5%	11.3%	0.1	-1.7
Seasonally Adjusted Unemployment Rate	9.9%	10.2%	11.6%	-0.3	-1.7
Employed	29,245	29,545	29,926	-300	-681

<b>Nonfarm Payroll Employment</b>	Dec. 2013	Nov. 2013	Dec. 2012	-Change from-	
				Nov. 2013	Dec. 2012
Total Nonfarm Payroll Employment	22,860	22,960	22,790	-100	70
Total private	19,400	19,450	19,200	-50	200
Mining and logging	110	120	100	-10	10
Construction	700	760	690	-60	10
Manufacturing	2,510	2,500	2,450	10	60
Wood product manufacturing	490	500	520	-10	-30
Trade, transportation, and utilities	5,060	5,040	5,050	20	10
Wholesale trade	950	940	1,000	10	-50
Retail trade	3,730	3,730	3,670	0	60
Food and beverage stores	830	850	840	-20	-10
Transportation, warehousing, and utilities	380	370	380	10	0
Information	260	260	270	0	-10
Financial activities	1,200	1,200	1,200	0	0
Professional and business services	1,830	1,830	1,800	0	30
Educational and health services	4,370	4,350	4,220	20	150
Educational services	140	150	140	-10	0
Health care and social assistance	4,230	4,200	4,080	30	150
Ambulatory health care services	1,620	1,610	1,530	10	90
Nursing and residential care facilities	1,220	1,210	1,160	10	60
Leisure and hospitality	2,470	2,500	2,510	-30	-40
Other services	890	890	910	0	-20
Government	3,460	3,510	3,590	-50	-130
Federal government	250	240	230	10	20
State government	710	720	760	-10	-50
Local government	2,500	2,550	2,600	-50	-100
Local education	1,790	1,840	1,880	-50	-90
Labor/Management Disputants	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.



**February 2014**

**Economic Indicators**

**Unemployment Rates**

Salem MSA	Raw	Seasonally
		Adjusted
Dec. 2013	7.3%	7.5%
Nov. 2013	7.1%	7.9%
<b>Yamhill County</b>		
Dec. 2013	6.6%	6.6%
Nov. 2013	6.3%	6.8%
<b>Oregon</b>		
Dec. 2013	6.9%	7.0%
Nov. 2013	6.7%	7.3%
<b>United States</b>		
Dec. 2013	6.5%	6.7%
Nov. 2013	6.6%	7.0%

**Nonfarm Payroll Employment  
 (Preliminary Estimates)**

Salem Metro	Employment	Annual Change
Total Employment	145,000	2,000
Manufacturing	11,000	200
Construction	6,500	200
Trade, Trans, & Utl.	25,600	1,000
Financial Act.	7,000	0
Prof. & Bus Svcs.	11,400	100
Educ. & Health Svcs.	23,500	800
Leisure & Hosp.	12,900	500
Other Private	7,300	-200
Government	39,800	-600

**Consumer Price Index (CPI)**

<b>United States (Dec. 2013)</b>	233.0
Yearly % Change	+1.5%
<b>Portland/Salem OR-WA MSA</b>	229.8
Annual Average 2012	+2.3%

<http://www.bls.gov/cpi>

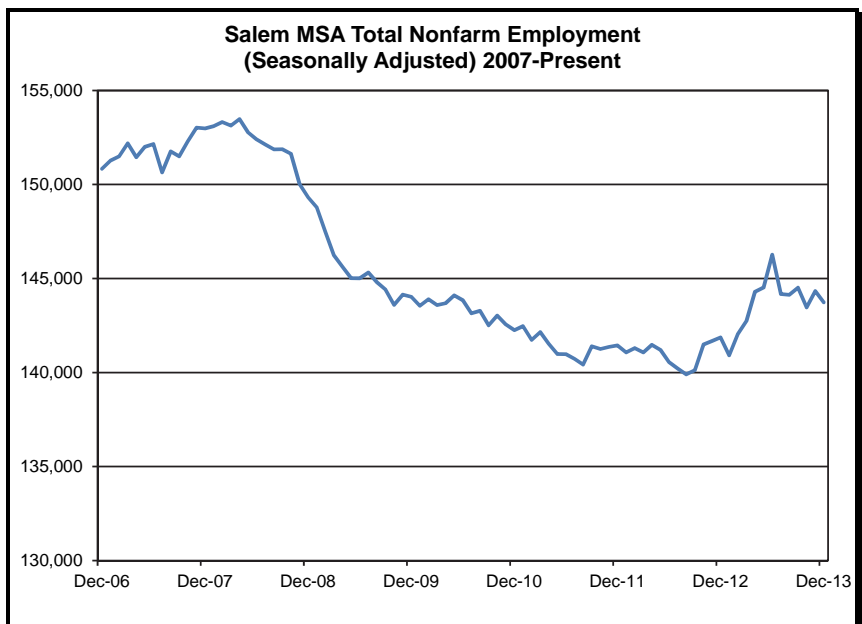
**Labor Trends by Email**

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**Local News**

In the Salem Metropolitan Statistical Area (MSA), the seasonally adjusted jobless rate dropped to 7.5 percent in December from its revised rate of 7.9 percent in November. December's unemployment rate is the lowest for the Salem MSA since September 2008. The Salem MSA's unemployment rate was higher than the statewide seasonally adjusted rate of 7.0 percent in December. The unemployment rate for the Salem MSA in December was 1.4 percentage points lower than the rate 12 months earlier in December 2012.

Nonfarm employment in the Salem MSA increased 2,000 over the past 12 months.



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## Labor Force Summary

An estimated 13,505 Marion and Polk County residents were unemployed in a civilian labor force of 184,194 for the month. There were 170,689 residents employed including payroll employees, self-employed, farm workers, and residents commuting outside of the counties for work. Overall, there were 3,306 fewer people unemployed in the Salem MSA than in December 2012.

## Nonfarm Payroll Employment

The Salem MSA's December total nonfarm employment was 145,000, up 2,000 jobs since December 2012. Private nonfarm employment gained 2,600 over the past 12 months, while public-sector employment was down 600 over that period. Educational and health services gained an estimated 800 jobs over the past 12 months, while leisure and hospitality gained 500. Trade, transportation, and utilities added 1,000 jobs since December 2012. Construction gained 200 jobs over the past 12 months and manufacturing employment has grown by 200.

*Nonfarm payroll employment statistics are by place of work and estimate how many jobs have been added or lost in an area. They measure an area's economic health and are based on a survey of employers. Nonfarm payroll employment shows how many people were employed in a given area, on average, during the month.*

From November to December, the federal Bureau of Labor Statistics estimated the Salem MSA's total nonfarm employment declined 1,500; the private sector shed 1,200 jobs during the month, while government employment dropped 300 from its November level. Salem normally sheds roughly 900 jobs from November to December. Seasonally adjusted total nonfarm employment declined 600.

Manufacturing employment declined 500 between November and December. Leisure and hospitality employment shed 100 jobs in December. Educational and health services shed 300 jobs over the month. In the public sector, federal government employment was unchanged, while local government employment dropped 100 and state government declined 200 jobs.

From April 2008 (Salem's pre-recession employment peak) to December 2013, the Salem MSA lost more than 9,700 jobs, or 6.4 percent. Oregon's employment level is currently 2.9 percent down from its pre-recession peak in December 2007.

## Outlook

The unemployment rate has come down over the past year, but it remains higher than the statewide rate. Salem's unemployment rate remains higher than normal and that will likely persist into 2014.

These preliminary estimates will be revised as new data from businesses becomes available.

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## Yamhill County Jobless Rates and Employment

In Yamhill County, the seasonally adjusted jobless rate was 6.6 percent in December, ticking down from its revised November rate of 6.8 percent. Yamhill County's unemployment rate was lower than the statewide seasonally adjusted rate, which was 7.0 percent in December. Yamhill County's unemployment rate of 6.6 percent in December was lower than the rate 12 months earlier when the county's rate was 8.1 percent. Statewide, the seasonally adjusted unemployment rate was 1.3 percentage points lower than its rate of 8.3 percent in December 2012.

In Yamhill County, nonfarm employment increased 580 jobs, or 1.9 percent, over the past 12 months.

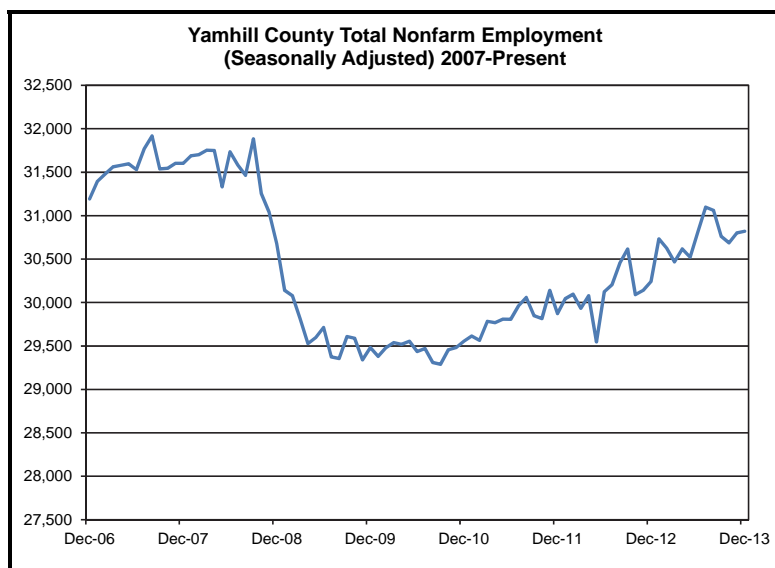
### Labor Force Summary

An estimated 3,146 Yamhill County residents were unemployed in a civilian labor force of 47,727 for the month. There were 44,581 residents employed including payroll employees, self-employed, farm workers, and residents commuting outside of the county for work. Overall, there were 699 fewer people unemployed in Yamhill County than in December 2012. Since December 2012, Yamhill County's civilian labor force has shed 523 people, or 1.1 percent.

### Nonfarm Payroll Employment

In Yamhill County, December total nonfarm employment was 31,190, gaining 580 jobs since December 2012. Private nonfarm employment is up 650 jobs from one year ago, while public-sector employment is down 70 over that period. Manufacturing gained employment over the past 12 months, adding 360 jobs. The county's construction sector has shown signs of growth over the past year, adding 60 jobs since December 2012.

From November to December, Yamhill County's total nonfarm employment decreased 560 jobs; the private sector shed 520 jobs and government employment dropped 40. December's job loss was slightly less than is typical for Yamhill County, which normally sheds about 580 jobs between November and December. Seasonally adjusted employment was up 20 jobs between November and December. From August 2007 (Yamhill County's pre-recession employment peak) to December 2013, Yamhill County lost nearly 1,100 jobs, or 3.4 percent. Oregon's employment level is currently 2.9 percent down from its pre-recession peak in December 2007.



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## Outlook

Employment growth over the past 12 months has been positive in Yamhill County's private sector, adding 650 jobs or 2.5 percent from one year ago. Manufacturing has added the most jobs over the past 12 months, adding 360 jobs to grow 5.9 percent. Higher-than-normal unemployment rates are likely to persist into 2014.

### **News From Around the Region** *(Material gathered from published, nonconfidential sources.)*

**Ace Hardware** in **Keizer** will close at the end of the month. It employs 10 people. *Keizertimes, 1/10/2014*

**Ash Studio Hair Design** opened in **south Salem**. *Statesman Journal, 1/23/2014*

**Growl Movement**, a craft beer filling station, opened a location in **south Salem**. *Statesman Journal, 1/24/2014*

**Lumber Liquidators** will open at Triangle Center in **southeast Salem**. *Portland Business Journal, 1/29/2014*

**Nancy's Burgers & Fries** opened a location in **West Salem**. *Statesman Journal, 1/8/2014*

**Carly's Closet**, a new and used children's clothing and gift store, will open in **Dallas**. *Polk County Itemizer-Observer, 1/8/2014*

**Tom Kunke Art Studio and Gallery** will open in **Dallas**. *Polk County Itemizer-Observer, 1/15/2014*

**Human Bean**, a drive-thru coffee stand, will open in **Newberg** in April. *The Newberg Graphic, 1/15/2014*

**The Stampede Barbeque Company** in **McMinnville** closed. *News-Register, 1/20/2014*

**Ruby Cakes** bakery in **McMinnville** closed. *News-Register, 1/20/2014*

**Aviva Aesthetics** opened in **McMinnville**. It offers hair removal and skin care services. *News-Register, 1/20/2014*

**Newberg Bike Shop** closed. *News-Register, 1/20/2014*

**Aviva Aesthetics** opened in **McMinnville**. It offers hair removal and skin care services. *News-Register, 1/20/2014*

Seventy workers at **SP Fiber Technologies** in **Newberg** were laid off. The company plans to convert a newsprint machine to one that will produce packing material. Some of the workers may be rehired when the new machine becomes operational in about six months. *The Newberg Graphic, 1/22/2014*



The **Gem Creole Saloon** will open in **McMinnville**. *News-Register*, 1/27/2014

**Subway** sandwich shop opened in **Sheridan**. *News-Register*, 1/27/2014

**Angela Estate** will open a tasting room in **Dundee**. *News-Register*, 1/27/2014

## New 2013 Population Estimates

The 2013 population estimates from Portland State University's Population Research Center were recently published. Those estimates show that Oregon gained 35,285 residents in 2013, growing 0.9 percent. That outpaced last year's growth of 26,110 residents, or 0.7 percent.

Gilliam County showed the fastest population growth of Oregon's 36 counties, growing 2.4 percent in 2013. At the other end of the spectrum, Harney County's loss of 55 residents, or 0.8 percent was the sharpest population decline among Oregon's counties.

### Marion County

Marion County added 2,385 residents in 2013, growing 0.7 percent. Marion County's population growth in 2013 was 14<sup>th</sup> fastest among Oregon's 36 counties.

Aumsville was the county's fastest growing city, adding 115 residents in 2013 to grow 3.1 percent.

Salem added the most residents with 1,315, or 0.8 percent. Salem has residents in both Marion and Polk counties and we will have to wait until Portland State University's Population Research Center publishes its full population report later this year to see where Salem's population growth took place. Woodburn was the only other city in the county to add more than 100 residents in 2013, adding 240, or 1.0 percent.

Population Estimates for Oregon and Marion County and its Incorporated Cities				
	Population Estimate July 1, 2013	Population Estimate July 1, 2012	Population Change 2012-2013	Percent Change 2012-2013
Oregon	3,919,020	3,883,735	35,285	0.9%
Marion County	322,880	320,495	2,385	0.7%
Aumsville	3,815	3,700	115	3.1%
Aurora	935	930	5	0.5%
Detroit	205	205	0	0.0%
Donald	980	980	0	0.0%
Gates*	485	485	0	0.0%
Gervais	2,520	2,520	0	0.0%
Hubbard	3,200	3,185	15	0.5%
Idanha*	135	135	0	0.0%
Jefferson	3,150	3,140	10	0.3%
Keizer	36,795	36,735	60	0.2%
Mill City*	1,870	1,870	0	0.0%
Mt. Angel	3,310	3,285	25	0.8%
St. Paul	420	420	0	0.0%
Salem*	157,770	156,455	1,315	0.8%
Scotts Mills	365	365	0	0.0%
Silverton	9,330	9,290	40	0.4%
Stayton	7,685	7,660	25	0.3%
Sublimity	2,745	2,680	65	2.4%
Turner	1,865	1,865	0	0.0%
Woodburn	24,330	24,090	240	1.0%

*Source: Portland State University Population Research Center*  
\*City is located and has population in more than one county.

Because Marion County has a number of cities that have population in multiple counties we can't simply subtract the sum all of city's growth from Marion County's growth to determine the growth taking place in unincorporated parts of Marion County. However, it certainly appears that a majority of the county's growth occurred in the incorporated cities within the county in 2013.

## Polk County

Polk County added 440 residents in 2013, growing 0.6 percent. Polk County's population growth in 2013 was 16<sup>th</sup> fastest among Oregon's 36 counties.

Dallas was the county's fastest growing city, adding 130 residents in 2013 to grow 0.9 percent. Salem added the most residents with 1,315, or 0.8 percent. Salem has residents in both Marion and Polk counties and we will have to wait until Portland State University's Population Research Center publishes its full population report later this year to see where Salem's population growth took place. Falls City and Willamina each added five residents. Monmouth was the only city in the county to show a population decline, losing 35 residents in 2013.

	Population Estimate July 1, 2013	Population Estimate July 1, 2012	Population Change 2012-2013	Percent Change 2012-2013
Oregon	3,919,020	3,883,735	35,285	0.9%
Polk County	77,065	76,625	440	0.6%
Dallas	14,800	14,670	130	0.9%
Falls City	950	945	5	0.5%
Independence	8,585	8,585	0	0.0%
Monmouth	9,720	9,755	(35)	-0.4%
Salem*	157,770	156,455	1,315	0.8%
Willamina*	2,030	2,025	5	0.2%

*Source: Portland State University Population Research Center*  
\*City is located and has population in more than one county.

Because Polk County has two cities that have population in multiple counties we can't simply subtract the sum all of city's growth from Polk County's growth to determine the growth taking place in unincorporated parts of Polk County. Even though West Salem is not a city, West Salem's population in 2012 was nearly 10,000 more than the city of Dallas, making it the largest incorporated population within Polk County. Until 2013 population estimates are available for West Salem it will be difficult to tell what share of Polk County's population growth in 2013 was in unincorporated parts of the county.

## Yamhill County

Yamhill County added 850 residents in 2013, growing 0.8 percent. Yamhill County's population growth in 2013 was 12<sup>th</sup> fastest among Oregon's 36 counties.

Carlton was the fastest growing city in the county during 2013, adding 30 residents to grow 1.5 percent. Newberg added 280 residents, or 1.3 percent. McMinnville gained 75 residents to grow 0.2 percent in 2013.

Yamhill County's population growth in 2013 was equally split, with half of the growth occurring within incorporated cities and half of the growth occurring in unincorporated parts of the county.

## Oregon Employment

Oregon's seasonally adjusted unemployment rate dropped to 7.0 percent in December from 7.3 percent in November. December marked Oregon's lowest unemployment rate since August 2008, when the rate was 6.7 percent.

In December, Oregon's unemployment rate fell as more people were able to find jobs and there were fewer unemployed. There were nearly 132,000 Oregonians unemployed compared with approximately 160,000 a year earlier. This drop of more than 28,000 individuals since December 2012 was good news for many families in the state and for many sectors of Oregon's economy.

Oregon's job growth in 2013 was much stronger than in the prior two years. In 2013, 37,700 jobs were added, compared with 22,000 in 2012 and 18,400 in 2011.

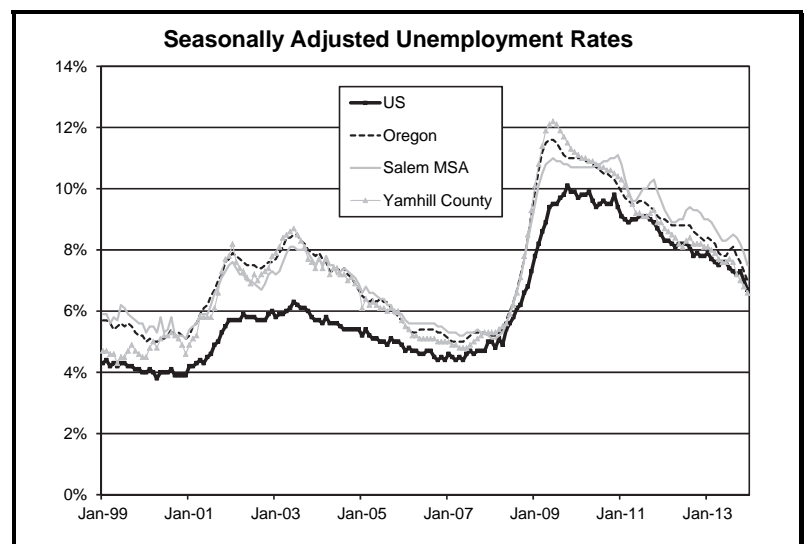
In recent months, the pace of expansion has accelerated. Seasonally adjusted payroll employment rose 4,400 in December, following a revised gain of 4,300 in November. Monthly gains have been the norm for some time now, with gains occurring in 13 of the past 15 months.

Job gains in December were concentrated in three of the 11 major industries: professional and business services (+1,600 jobs), government (+1,200) and other services (+900).

Professional and business services grew rapidly in December and throughout last year. The sector gained 7,500 jobs, or 3.8 percent, since December 2012, to grow faster than any major industry other than construction. It reached another all-time high in December, on a seasonally adjusted

	Population Estimate July 1, 2013	Population Estimate July 1, 2012	Population Change 2012-2013	Percent Change 2012-2013
Oregon	3,919,020	3,883,735	35,285	0.9%
Yamhill County	101,400	100,550	850	0.8%
Amity	1,610	1,610	0	0.0%
Carlton	2,065	2,035	30	1.5%
Dayton	2,550	2,535	15	0.6%
Dundee	3,170	3,175	-5	-0.2%
Lafayette	3,755	3,735	20	0.5%
McMinnville	32,510	32,435	75	0.2%
Newberg	22,580	22,300	280	1.3%
Sheridan	6,180	6,180	0	0.0%
Willamina*	2,030	2,025	5	0.2%
Yamhill	1,030	1,020	10	1.0%

Source: Portland State University Population Research Center  
\*City is located and has population in more than one county.



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basis. Each of its three component industries (professional and technical services, management of companies and enterprises, and administrative and waste services) expanded rapidly over the past three years.

Government cut only 1,700 jobs in December, during a month when a loss of 2,900 is expected due to seasonal factors. State government was close to a record high as it employed 82,700 in December, a gain of 1,200 in 12 months. Meanwhile, local government employed only 183,800 in December, which was its lowest December figure in nine years.

Other services added 400 jobs when a loss of 500 is the normal seasonal movement for December. Employment growth accelerated over the last three years. The industry added more than 2,000 jobs in 2013, which was equal to a growth rate of 3.7 percent.

## **National Employment**

The unemployment rate declined from 7.0 percent to 6.7 percent in December, while total nonfarm payroll employment edged up (+74,000), the U.S. Bureau of Labor Statistics reported. Employment rose in retail trade and wholesale trade but was down in information.

The number of unemployed persons declined by 490,000 to 10.4 million in December, and the unemployment rate declined by 0.3 percentage point to 6.7 percent. Over the year, the number of unemployed persons and the unemployment rate were down by 1.9 million and 1.2 percentage points, respectively.

Total nonfarm payroll employment edged up in December (+74,000). In 2013, job growth averaged 182,000 per month, about the same as in 2012 (+183,000 per month). In December, job gains occurred in retail trade and wholesale trade, while employment declined in information.

Employment in retail trade rose by 55,000 in December. Within the industry, job gains occurred in food and beverage stores (+12,000), clothing and accessories stores (+12,000), general merchandise stores (+8,000), and motor vehicle and parts dealers (+7,000). Retail trade added an average of 32,000 jobs per month in 2013.

In December, wholesale trade added 15,000 jobs. Most of the job growth occurred in electronic markets and agents and brokers (+9,000). Wholesale trade added an average of 8,000 jobs per month in 2013.

Employment in professional and business services continued to trend up in December (+19,000). In 2013, job growth in professional and business services averaged 53,000 per month. Within the industry, temporary help services added 40,000 jobs in December, while employment in accounting and bookkeeping services declined by 25,000.

Manufacturing employment continued to trend up in December (+9,000). Employment rose in primary metals (+4,000) and petroleum and coal products (+2,000), while electronic instruments (-4,000) lost jobs. Manufacturing added 77,000 jobs in 2013, compared with an increase of 154,000 jobs in 2012.

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Employment in mining edged up in December (+5,000). The industry added 29,000 jobs over the year.

Health care employment changed little in December (-6,000). Employment gains in the industry averaged 17,000 per month in 2013, compared with an average monthly gain of 27,000 in 2012.

**Current Labor Force and Industry Employment**  
**Salem MSA LABOR FORCE SUMMARY**  
 (by place of residence)

	Dec. 2013	Nov. 2013	Dec. 2012	-Change from-	
				Nov. 2013	Dec. 2012
Civilian Labor Force	184,194	188,211	190,388	-4,017	-6,194
Unemployment	13,505	13,424	16,811	81	-3,306
Percent of Labor Force	7.3%	7.1%	8.8%	XX	XX
Total Employment	170,689	174,787	173,577	-4,098	-2,888
Seasonally Adjusted Unemployment Rate	7.5%	7.9%	8.9%	XX	XX

**Salem MSA NONFARM PAYROLL EMPLOYMENT**  
 (by place of work)

	Dec. 2013	Nov. 2013	Dec. 2012	-Change from-	
				Nov. 2013	Dec. 2012
TOTAL NONFARM PAYROLL EMPLOYMENT	145,000	146,500	143,000	-1,500	2,000
SEASONALLY ADJUSTED NONFARM PAYROLL EMPLOYMENT	143,700	144,300	141,900	-600	1,800
TOTAL PRIVATE	105,200	106,400	102,600	-1,200	2,600
Mining and logging	1,200	1,200	1,300	0	-100
Construction	6,500	6,800	6,300	-300	200
Manufacturing Total	11,000	11,500	10,800	-500	200
Durable Goods	4,800	4,800	4,900	0	-100
Nondurable Goods	6,200	6,700	5,900	-500	300
Food Products Manufacturing	4,400	4,600	3,900	-200	500
Trade, Transportation, and Utilities	25,600	25,600	24,600	0	1,000
Wholesale Trade	3,700	3,700	3,500	0	200
Retail Trade	17,800	17,900	17,200	-100	600
Transportation, Warehousing, and Utilities	4,100	4,000	3,900	100	200
Information	1,000	1,000	1,100	0	-100
Financial Activities	7,000	7,000	7,000	0	0
Professional and Business Services	11,400	11,400	11,300	0	100
Administrative and Support Services	5,800	5,800	5,500	0	300
Educational and Health Services	23,500	23,800	22,700	-300	800
Health Care and Social Assistance	20,000	20,200	19,300	-200	700
Health Care	17,100	17,300	16,500	-200	600
Leisure and Hospitality	12,900	13,000	12,400	-100	500
Accommodation and Food Services	11,800	12,000	11,200	-200	600
Other Services	5,100	5,100	5,100	0	0
GOVERNMENT	39,800	40,100	40,400	-300	-600
Federal Government	1,400	1,400	1,500	0	-100
State Government	20,400	20,600	20,600	-200	-200
State Government Educational Services	1,900	1,900	2,200	0	-300
Local Government	18,000	18,100	18,300	-100	-300
Tribal Government	1,600	1,600	1,700	0	-100
Local Government Educational Services	10,300	10,300	10,400	0	-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. "Natural resources" includes only Logging (NAICS 1133).

**Current Labor Force and Industry Employment**  
**Yamhill County LABOR FORCE SUMMARY**  
 (by place of residence)

Labor Force Status	Dec.	Nov.	Dec.	---Change from---	
	2013	2013	2012	Nov. 2013	Dec. 2012
Civilian Labor Force	47,727	47,848	48,250	-121	-523
Unemployment	3,146	3,037	3,845	109	-699
Percent of Labor Force	6.6%	6.3%	8.0%	XX	XX
Total Employment	44,581	44,811	44,405	-230	176
Seasonally Adjusted Unemployment Rate	6.6%	6.8%	8.1%	xx	XX

**YAMHILL COUNTY NONFARM PAYROLL EMPLOYMENT**  
 (by place of work)

TOTAL NONFARM PAYROLL EMPLOYMENT	31,190	31,750	30,610	-560	580
SEASONALLY ADJUSTED NONFARM PAYROLL EMPLOYMENT	30,820	30,800	30,240	20	580
Total private	26,570	27,090	25,920	-520	650
Mining and logging	170	180	170	-10	0
Construction	1,180	1,210	1,120	-30	60
Manufacturing	6,460	6,680	6,100	-220	360
Trade, transportation, and utilities	4,500	4,620	4,510	-120	-10
Wholesale trade	540	530	530	10	10
Retail trade	3,360	3,360	3,250	0	110
Motor vehicle and parts dealers	540	540	510	0	30
Food and beverage stores	890	900	860	-10	30
General merchandise stores	780	760	740	20	40
Transportation, warehousing, and utilities	600	730	730	-130	-130
Information	170	170	170	0	0
Financial activities	1,080	1,060	1,070	20	10
Professional and business services	1,740	1,760	1,770	-20	-30
Educational and health services	7,190	7,280	7,020	-90	170
Educational services	2,950	3,080	2,840	-130	110
Health care and social assistance	4,240	4,200	4,180	40	60
Leisure and hospitality	3,040	3,090	2,960	-50	80
Other services	1,040	1,040	1,030	0	10
Government	4,620	4,660	4,690	-40	-70
Federal government	460	450	460	10	0
State government	410	400	440	10	-30
Local government	3,750	3,810	3,790	-60	-40
Local education	2,290	2,320	2,300	-30	-10
Local government, excluding educational services	1,460	1,490	1,490	-30	-30
Labor Disputes	0	0	0	0	0

The most recent month is preliminary, the prior month is revised.

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**February 2014**

## Economic Indicators Unemployment Rates

	<u>Raw</u>	<u>Seasonally Adjusted</u>
<b>Coos County</b>		
December 2013	8.9%	9.2%
Previous month	8.9%	9.5%
Year ago	10.3%	10.5%

<b>Curry County</b>		
December 2013	10.3%	10.0%
Previous month	9.9%	10.2%
Year ago	11.5%	11.2%

<b>Oregon</b>		
December 2013	6.9%	7.0%
Previous month	6.7%	7.3%
Year ago	8.2%	8.3%

<b>United States</b>		
December 2013	6.5%	6.7%
Previous month	6.6%	7.0%
Year ago	7.6%	7.9%

## Consumer Price Index (CPI)

1982-1984 = 100  
 All Urban Consumers

### United States

December 2012	229.601
December 2013	233.049
Percent change	1.5%

### Portland-Salem OR-WA

Jan-June 2012	228.746
Jan-June 2013	233.735
Percent change	2.2%

Source: Bureau of Labor Statistics

### **This month's issue:**

- Monthly employment analysis – national, Oregon, Coos and Curry counties
- Published business news from around the region
- Conference Board's Help Wanted Online Index – Real-time Labor Market Information

## **Coos County Food Manufacturing Added Jobs in December**

Coos County total payroll employment rose by 50 jobs in December. Manufacturing posted the largest increase of published industries, gaining 110 jobs over the month. Most of the gain was attributed to an increase of 70 in food manufacturing. Retail trade and educational and health services both added 30 jobs in December. Leisure and hospitality employment continued its typical seasonal losses, shedding 100 jobs over the month. Government employment showed little change, with losses totaling 20 in local government offset by a gain of 10 in state government.

Over the year, a number of private sector industries showed estimated employment increases. Those gaining jobs include wood product manufacturing (+30), food manufacturing (+110), transportation, warehousing and utilities (+30), retail trade (+70), and local government education (+110).

### **Labor Trends by Email**

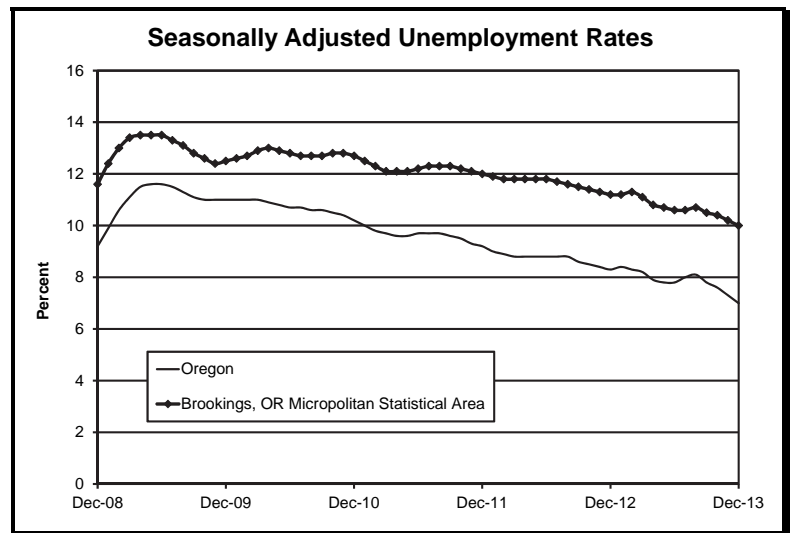
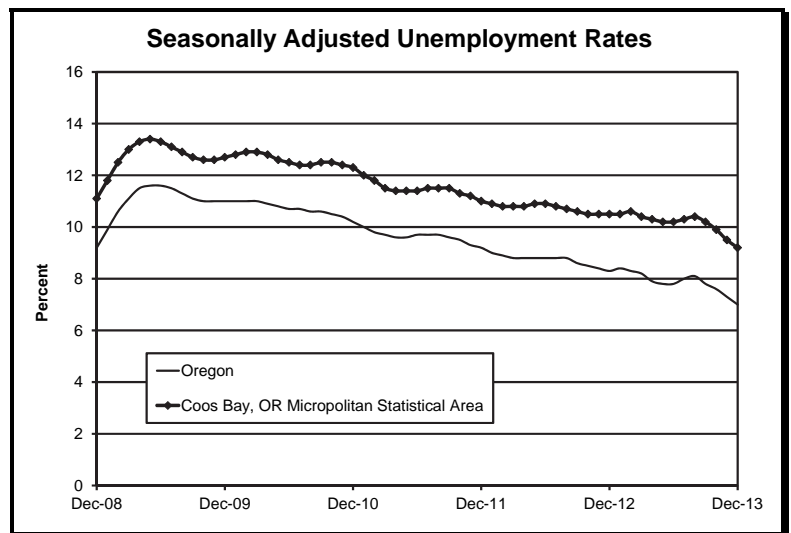
*If you are a current subscriber and would like to receive Labor Trends electronically rather than as a paper copy, please send an email to [Lmipubs.emp@state.or.us](mailto:Lmipubs.emp@state.or.us) and include the name of the newsletter and the ID# located at the top of the mailing label.*

Employment fell in private educational and health services (-60), leisure and hospitality (-80), and business and professional services (-160). State and federal government (-10 each) both saw over-the-year job losses.

## Curry County One of Four Oregon Counties Losing Payroll Jobs Over the Year

Curry County payroll employment fell by 120 jobs over the month. Most of the losses were in leisure and hospitality (-80), construction (-50), and professional and business services (-20). Mining and logging also shed jobs, down by 10. Over the year, payroll employment declined by 150 jobs. Curry joins Baker (-70), Malheur (-30) and Umatilla (-260) as the only counties in Oregon with declining payroll employment since December 2012.

In Curry County since December 2012, payroll employment gains were estimated in wood product manufacturing (+40) and financial activities (+20). On the other hand, job declines occurred in professional and business services (-100), leisure and hospitality (-30) and construction (-50). Government employment fell by 40, with losses in state (-30) and local government (-10).



## Local Business News

All material gleaned from published, nonconfidential sources.

**Wayne Schrunk Construction** in the **Coos Bay** area closed. *The World*, 12/14/2013

Up to 10 transcriptionists at **Bay Area Hospital** in **Coos Bay** will lose their jobs if they don't join SoftScript: Medical Transcription Service, an outsourcing company, or take other positions within the hospital. *The World*, 12/21/2013

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For address changes, contact [Lmipubs.emp@state.or.us](mailto:Lmipubs.emp@state.or.us) or (503) 947-1204.

Clothing store **rue21** will open at Pony Village Mall in **North Bend** in late March. It will offer casual wear and accessories for young men and women. *The World, 1/22/2014*

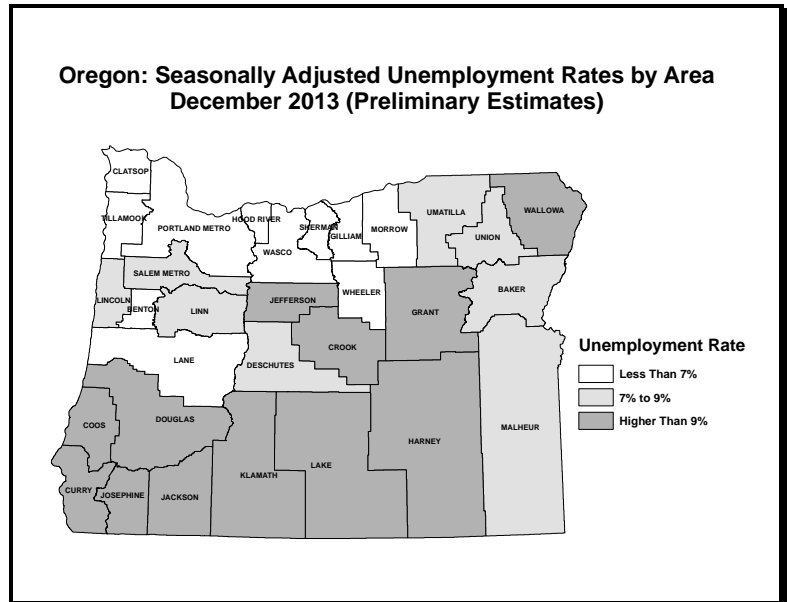
**D'sinez**, a graphic design and sign, sticker, decal, and banner-making store in **Brookings** opened in August 2011 and has seen business steadily increase. *Curry Coastal Pilot, 1/15/2014*

Brookings-based **C&K Market Inc.** laid off at about 45 employees at its corporate offices in **Brookings** and **Medford**. *Curry Coastal Pilot, 1/8/2014*

## Oregon Job Growth Ranked Third Among U.S. States Since December 2012

Oregon's seasonally adjusted unemployment rate dropped to 7.0 percent in December from 7.3 percent in November. December marked Oregon's lowest unemployment rate since August 2008, when the rate was 6.7 percent.

In December, Oregon's unemployment rate fell as more people were able to find jobs and there were fewer unemployed. There were nearly 132,000 Oregonians unemployed compared with approximately 160,000 a year earlier. This drop of more than 28,000 individuals since December 2012 was good news for many families in the state and for many sectors of Oregon's economy.



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Government cut only 1,700 jobs in December, during a month when a loss of 2,900 is expected due to seasonal factors. State government was close to a record high as it employed 82,700 in

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December, a gain of 1,200 in 12 months. Meanwhile, local government employed only 183,800 in December, which was its lowest December figure in nine years.

Other services added 400 jobs when a loss of 500 is the normal seasonal movement for December. Employment growth accelerated over the last three years. The industry added more than 2,000 jobs in 2013, which was equal to a growth rate of 3.7 percent.

## **National Trends**

The unemployment rate declined from 7.0 percent to 6.7 percent in December, while total nonfarm payroll employment edged up (+74,000), the U.S. Bureau of Labor Statistics reported. Employment rose in retail trade and wholesale trade but was down in information.

The number of unemployed persons declined by 490,000 to 10.4 million in December, and the unemployment rate declined by 0.3 percentage point to 6.7 percent. Over the year, the number of unemployed persons and the unemployment rate were down by 1.9 million and 1.2 percentage points, respectively.

Total nonfarm payroll employment edged up in December (+74,000). In 2013, job growth averaged 182,000 per month, about the same as in 2012 (+183,000 per month). In December, job gains occurred in retail trade and wholesale trade, while employment declined in information.

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Employment in mining edged up in December (+5,000). The industry added 29,000 jobs over the year.

Health care employment changed little in December (-6,000). Employment gains in the industry averaged 17,000 per month in 2013, compared with an average monthly gain of 27,000 in 2012.

Employment in information fell by 12,000 in December, driven by a decline in the motion picture and sound recording industry (-14,000). Employment in information was essentially unchanged over the year.

Construction employment edged down in December (-16,000). However, in 2013, the industry added an average of 10,000 jobs per month. Employment in nonresidential specialty trade contractors declined by 13,000 in December, possibly reflecting unusually cold weather in parts of the country.

Employment in other major industries, including transportation and warehousing, financial activities, leisure and hospitality, and government, changed little in December.

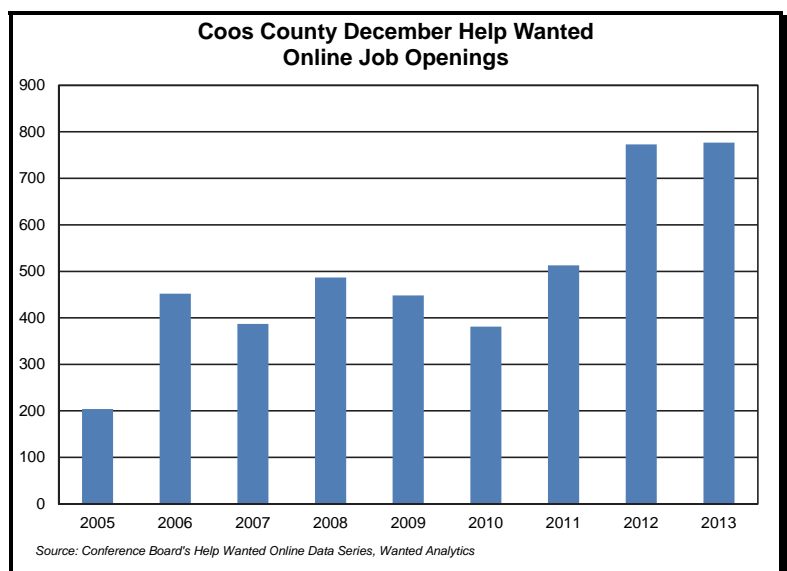
## The Conference Board Help Wanted OnLine® Index Shows Increasing Online Job Postings for the South Coast

The Conference Board Help Wanted OnLine® (HWOL) index provides a gauge of demand for labor. Data are compiled each month on aggregate job listings from online job boards for Oregon and its counties. This series began in 2005 and allows us to compare trends in posted online job openings through the Great Recession and up to December 2013. While the Oregon Employment Department produces monthly estimates of job growth by industry, this information really doesn't convey which actual occupations are seeing the greatest demand. The HWOL data collects job listings by specific occupation. This enables analysis in nearly real-time on demand for labor by occupation group and specific job title for Oregon and its counties.

As with most data, there are some caveats in using these data over time. If businesses are increasing their utilization of online job postings over time, then this would represent more of a structural shift in how employers are posting job openings rather than a perfect indicator that demand for labor is increasing. This may be the case for some areas, such as on the South Coast where trends in online job postings in recent years far outpaced actual employment growth. Also, just because an employer posts a job opening does not mean that all openings are being filled. We have seen similar trends in the Bureau of Labor Statistics Job Opening and Labor Turnover Survey (JOLTS). Following the Great Recession, JOLTS data show that the number of job openings has risen notably faster than the number of actual new hires. Employers may be testing the waters to increase their applicant pool or are unable to find workers with the required skills or experience.

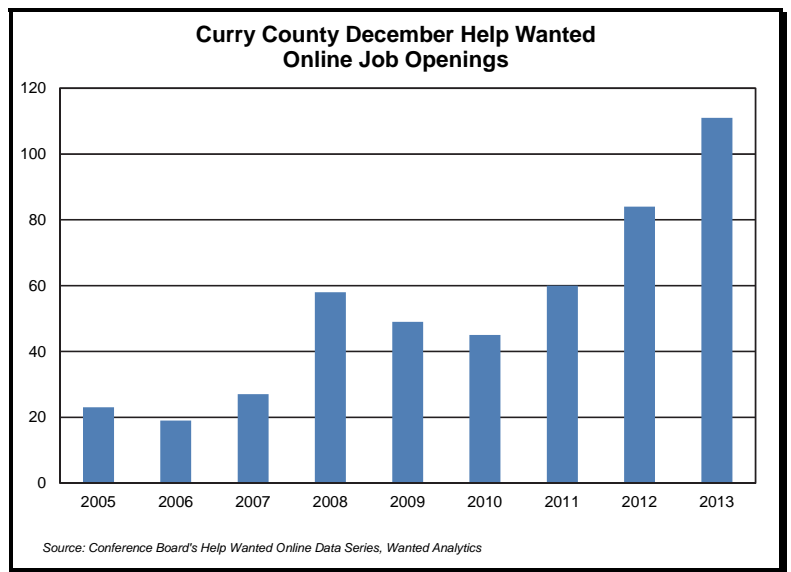
### South Coast Trends Show Steady Gains on Online Job Postings

In Coos County, comparing December total online job postings over time shows that the Great Recession had a modest impact, as total advertised job openings fell from 487 in December 2008 to 381 in



Graph 1

December 2010, a decline of 22 percent. Since that low point, online job postings rose steadily, with gains in the next two years. Over the most recent year, December online openings matched the 2012 total. Following the series low in 2005, there were about 570 more online openings posted in December 2013 (Graph 1). Some of this gain is likely the result of more businesses using the internet for recruitment rather than solely a result of increasing demand for labor.

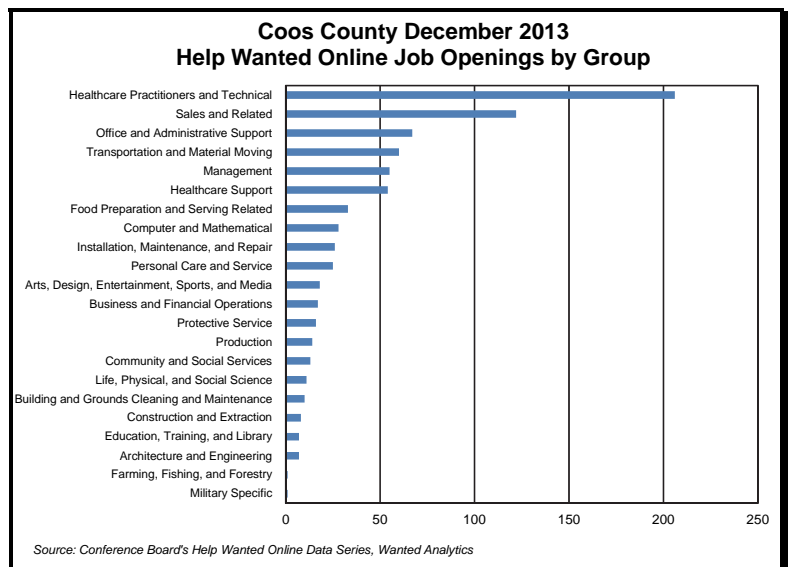


Graph 2

Curry County displays a somewhat different trend than neighboring Coos County. From the 2010 low point during the Great Recession to 2013, the number of job postings more than doubled from 45 to 111 in December 2013 (Graph 2). Since there has been so little change in payroll employment since 2010, this may be a case of more employers migrating to online listings, rather than steadily increasing overall job listings over that time. It would be wise to use caution in equating these data as a perfect representation of labor demand for the region. However, it does show that there are job openings in Curry County, and it would behoove job seekers to utilize the internet to find those posted job openings.

### December Online Job Postings by Occupational Group

In Coos County, health care practitioners and technical occupations dominated the broad occupational group list, with more than 200 job openings posted. Health care support also ranked high on the list with more than 50 online openings. Sales, office and administrative support, and transportation/material moving occupational groups also had many online job openings. Even during the slower season for tourism, there were still over 30 online openings for food preparation and serving-related jobs in December (Graph 3).



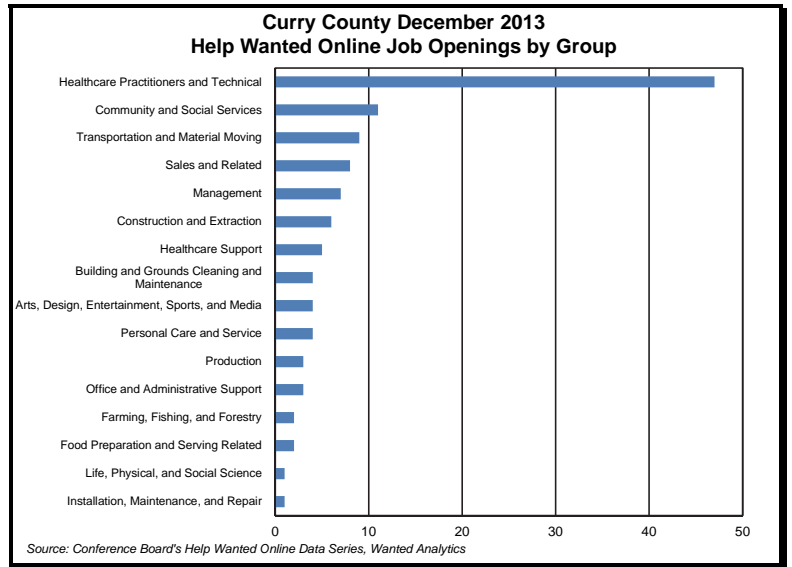
Graph 3

Curry County's top occupational group was also health care practitioners and technical occupations. Its dominance over

the other broad occupational groups was even more pronounced than in Coos County. Community and social services, transportation and material moving, and sales and related occupations had a few online openings in December (Graph 4).

### Drilling Down to the Details: Jobs with the Most Online Openings

So far we have examined overall trends in online job openings, and openings by broad group. Now let's look at the specifics. What detailed occupations had the most online openings in December 2013?



### Coos County

Graph 4

Is it a surprise that occupational therapists are at the top of the ranked list in Coos County? With nearly 70 positions posted online, demand for this occupation appears strong. Other health care-related occupations with many online openings were registered nurses, medical and health service managers, and nursing assistants. Other occupational titles with job openings posted online were truck drivers, retail salespersons, customer service representatives, and various supervisory positions (Table 1).

Table 1

Occupational Therapists	67
Physical Therapists	43
Heavy and Tractor-Trailer Truck Drivers	38
Registered Nurses	31
Occupational Therapy Assistants	30
Speech-Language Pathologists	28
Retail Salespersons	26
Medical and Health Services Managers	25
Customer Service Representatives	21
First-Line Supervisors of Retail Sales Workers	19
Security Guards	15
First-Line Supervisors of Food Preparation and Serving Workers	15
Nursing Assistants	14
Merchandise Displayers and Window Trimmers	11
Sales Representatives, Wholesale and Manufacturing, Exc. Technical and Scientific Products	11
Demonstrators and Product Promoters	11
Personal Care Aides	10
Licensed Practical and Licensed Vocational Nurses	9
Insurance Sales Agents	9
Driver/Sales Workers	9

Source: Conference Board's Help Wanted Online Data Series, Wanted Analytics

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## Curry County

Detailed occupational online job postings were also dominated by health care jobs in Curry County in December, but speech-language pathologists far outpaced social and human service assistants, pharmacy technicians and registered nurses for the top spot. Others on the top list of the most online openings related to health care were physical therapists, personal care aides and medical assistants. As was the case looking at broader occupational categories, the detailed occupational data show the unbalanced trend in online openings heavily weighted toward health care and social assistance in Curry County.

These fairly new and detailed data provide another piece of the labor market information puzzle that helps paint a more complete picture of which occupational groups and specific occupations are seeing the greatest number of job openings posted. Granted, these are “online” postings only and do not capture every job opening that is posted. We might assume looking at the growth trends in online posting numbers over time, more employers are utilizing the internet and online job boards as one tool in their recruitment toolkit. Analyzing these data provides reasonably good information on the greatest demand for labor by occupation, in nearly real-time.

**Table 2**

<b>Top 20 December 2013 Help Wanted Online Job Openings in Curry County</b>	
Speech-Language Pathologists	23
Social and Human Service Assistants	6
Pharmacy Technicians	6
Registered Nurses	5
Heavy and Tractor-Trailer Truck Drivers	5
Mental Health and Substance Abuse Social Workers	4
Physical Therapists	4
Personal Care Aides	4
Demonstrators and Product Promoters	4
Merchandise Displayers and Window Trimmers	3
Pharmacists	3
Janitors and Cleaners, Except Maids and Housekeeping Cleaners	3
Lodging Managers	2
Occupational Therapists	2
Medical Assistants	2
Combined Food Preparation and Serving Workers, Including Fast Food	2
Cashiers	2
Sales Agents, Financial Services	2
Farmworkers, Farm, Ranch, and Aquacultural Animals	2
Roofers	2

*Source: Conference Board's Help Wanted Online Data Series, Wanted Analytics*



**COOS COUNTY CURRENT LABOR FORCE AND INDUSTRY EMPLOYMENT**

	Dec. 2013	Nov. 2013	Dec. 2012	-Change from-	
				Nov. 2013	Dec. 2012
<b>Labor Force Status</b>					
Civilian Labor Force	26,978	27,028	27,787	-50	-809
Unemployed	2,413	2,393	2,850	20	-437
Unemployment rate	8.9%	8.9%	10.3%	0.1	-1.3
Seasonally Adjusted Unemployment Rate	9.2%	9.5%	10.5%	-0.3	-1.3
Employed	24,565	24,635	24,937	-70	-372

	Dec. 2013	Nov. 2013	Dec. 2012	-Change from-	
				Nov. 2013	Dec. 2012
<b>Nonfarm Payroll Employment</b>					
Total Nonfarm Payroll Employment	21,400	21,350	21,250	50	150
Total private	15,320	15,260	15,320	60	0
Mining and logging	510	520	520	-10	-10
Construction	660	660	660	0	0
Manufacturing	1,750	1,640	1,560	110	190
Wood product manufacturing	770	780	740	-10	30
Food manufacturing	410	340	300	70	110
Trade, transportation, and utilities	4,210	4,180	4,100	30	110
Wholesale trade	340	340	330	0	10
Retail trade	2,970	2,940	2,900	30	70
Food and beverage stores	690	700	670	-10	20
General merchandise stores	910	900	910	10	0
Transportation, warehousing, and utilities	900	900	870	0	30
Information	190	190	190	0	0
Financial activities	770	770	760	0	10
Professional and business services	2,050	2,050	2,210	0	-160
Educational and health services	2,520	2,490	2,580	30	-60
Leisure and hospitality	2,110	2,210	2,190	-100	-80
Other services	550	550	550	0	0
Government	6,080	6,090	5,930	-10	150
Federal government	340	340	350	0	-10
State government	940	930	950	10	-10
Local government	4,800	4,820	4,630	-20	170
Indian tribal	760	750	750	10	10
Local education	1,890	1,910	1,780	-20	110
Labor/Management Disputants	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.

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**CURRY COUNTY CURRENT LABOR FORCE AND INDUSTRY EMPLOYMENT**

<b>Labor Force Status</b>	Dec.	Nov.	Dec.	-Change from-	
	2013	2013	2012	Nov. 2013	Dec. 2012
Civilian Labor Force	8,296	8,497	8,842	-201	-546
Unemployed	855	845	1,017	10	-162
Unemployment rate	10.3%	9.9%	11.5%	0.4	-1.2
Seasonally Adjusted Unemployment Rate	10.0%	10.2%	11.2%	-0.2	-1.2
Employed	7,441	7,652	7,825	-211	-384
<b>Nonfarm Payroll Employment</b>	Dec.	Nov.	Dec.	-Change from-	
	2013	2013	2012	Nov. 2013	Dec. 2012
Total Nonfarm Payroll Employment	5,880	6,000	6,030	-120	-150
Total private	4,670	4,800	4,780	-130	-110
Mining and logging	120	130	120	-10	0
Construction	270	320	320	-50	-50
Manufacturing	600	600	560	0	40
Wood product manufacturing	430	430	390	0	40
Trade, transportation, and utilities	1,200	1,200	1,190	0	10
Retail trade	990	1,000	1,000	-10	-10
Information	70	70	70	0	0
Financial activities	360	350	340	10	20
Professional and business services	360	380	460	-20	-100
Educational and health services	660	650	660	10	0
Health care	570	560	560	10	10
Leisure and hospitality	870	950	900	-80	-30
Arts, entertainment, and recreation	40	40	40	0	0
Accommodation and food services	830	910	860	-80	-30
Other services	160	150	160	10	0
Government	1,210	1,200	1,250	10	-40
Federal government	80	80	80	0	0
State government	150	150	180	0	-30
Local government	980	970	990	10	-10
Labor/Management Disputants	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.

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