

## Are You Better Off than Before the Recession?

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Were you working before the recession? If so, are you still working today? If you said “yes” to both then I have another question for you. Are you better off today than before the recession? Anecdotally, I hear stories from families across Oregon who say they don’t feel like we are in an economic expansion due to stagnation in their wages and the rising costs of goods and services. Their paycheck today is spread thinner than it was back in 2005. However, the plural of anecdote is not data. What does the data say? Are pre-recession workers who are still employed better off than they were before the recession?



Using payroll tax records we grabbed all individuals who were employed through all four quarters of 2005. This cohort of pre-recession workers was our universe. It included everyone from teen burger flippers to executives on the verge of retirement; everyone who reported wages throughout 2005. Then we tracked the wages of this cohort through the recession and into the recent recovery. As expected, the cohort shrank through the years as individuals became unemployed, retired, or moved away from Oregon. What about those who kept working in Oregon through these tumultuous years? Did this cohort of workers see their wages rise? Are they better off today than before the recession?

More than 1.3 million Oregon workers had reported wages in all four quarters of 2005. The inflation adjusted median wage of this cohort of workers was around \$37,000. This was a good time in Oregon’s economy. The statewide unemployment rate was 6.2 percent and trending down. Jobs were being added into the economy at a rate of

nearly 3 percent a year. The levels of economic production were also growing rapidly. Oregon’s gross domestic product rose 3.5 percent in 2005 from the prior year. These were good times to be in the labor force in Oregon. It is no surprise that many folks use words, such as secure, stable, and confident to describe their interaction with the economy back in 2005.

The peak of the boom years before the recession was in 2007. As expected wages rose for this group as the economy continued to expand. Pay for our cohort of 2005 workers reached \$37,890 by 2008, an increase of 2.2 percent from the 2005 levels. How did the recession impact these wages? As expected wages declined, but not by much and it was a short-lived decline. Median annual wages only dropped by about \$260. The upward trajectory of wages for our cohort of pre-recession workers was reestablished in 2009. Wages rose every year since 2009 with the exception of 2013 when there was a slight decline; however those wages rebounded in 2014.

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The compound annual growth rate during the nine-year period was 0.8 percent, fairly strong wage growth amidst

“The Great Recession.” By

last year the inflation adjusted median wage for our cohort of pre-recession workers was 7.5 percent higher than in 2005 (+\$2,767).

On the whole, pre-recession workers are better off today than before the recession began. Their wages are up relative to the cost of goods and services. However, it is not too surprising to see wage gains for a cohort of workers. We would expect to see individual wages rise as they gain experience and seniority. So, was the rise in wages this cohort experienced more or less than we would expect? We pulled data for another cohort of workers, those who worked four quarters in 1996. This group of workers also experienced a recession (2001), albeit shorter and with fewer employment losses. How did this earlier cohort of workers from 1996 fare over nine years?

The cohort of Oregon workers from 1996 saw their wages rise 7 percent over a nine year period. How about our 2005 cohort? Over nine years, that pre-recession cohort of 2005 workers experienced slightly higher wage growth (+7.5%). These results were a bit surprising. The assumption was that the 2008 recession was so severe and long-lasting that wage growth would be subdued compared with previous cohorts. Instead, strong

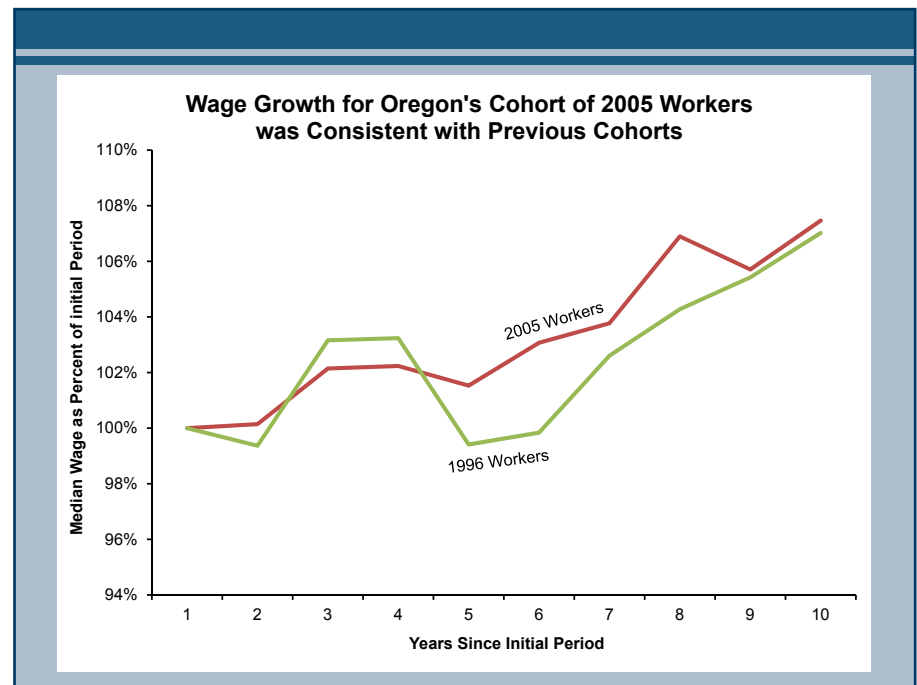
**O**n the whole, pre-recession workers are better off today than before the recession.

wage gains after the recession made up for the slight dip experienced in the midst of the downturn.

Although wage growth was slightly faster for our 2005 cohort, the inflation-adjusted wages of the 1996 cohort were significantly higher. The median wage of 1996 four-quarter workers was \$45,800, over \$8,700 more annually than our 2005 cohort. That gap widened slightly over time with that 1996 cohort making over \$9,000 more than our 2005 cohort after nine years.

Those who were working before the recession and continue to work are better off today than they were back

in the mid-2000s. After accounting for the cost of living, this cohort of Oregon workers is on average making nearly \$3,000 more a year than back in 2005. The fear was that the recession disrupted typical wage gains over the course of a career, essentially leaving this cohort of workers a step behind previous cohorts. This would be a major issue for those approaching retirement age or those who should be entering their peak wage years. Would they be able to make up the lost earnings? However, the wage gains for this cohort of prerecession workers was almost identical to previous cohorts of workers over a comparable span of time. It is now five years since the end of the recession, and the median wage has increased for those workers who were working in Oregon before the recession and are still working today. ■



### Find Occupational and Wage Information on [www.QualityInfo.org](http://www.QualityInfo.org)

An abundance of occupational and wage information can be found at [www.QualityInfo.org](http://www.QualityInfo.org). The site provides information regarding where the jobs are, how much they pay, what skills and education are needed, where to get the necessary education and training, and what the employment outlook looks like for over 700 occupational titles.

You can also view current job openings placed with the Oregon Employment Department and on other sites across the Internet. The tool includes information for Oregon as well as local area data.

Find the Occupation & Wage Information tool by visiting [www.QualityInfo.org](http://www.QualityInfo.org) and clicking on “Occupation & Wage Information” under the “Jobs & Careers” section.



# Oregon's Unemployment Rate Edges Down to 6.0 Percent in October

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Oregon's unemployment rate edged down to 6.0 percent in October, from 6.2 percent in September. A year prior, in October 2014, Oregon's unemployment rate was 6.8 percent.

In October, payroll employment rose by 2,100, with gains of 800 or more in four major industries partially offset by declines in two industries. Industries gaining the most jobs included professional and business services (+2,200 jobs), leisure and hospitality (+1,100), construction (+1,000), and manufacturing (+800). Those declining in October included private educational services (-1,400 jobs) and transportation, warehousing, and utilities (-1,000).

The September payroll estimates were revised substantially and now show a drop of only 900 for the month, whereas the preliminary figures indicated a drop of 5,300 jobs. Each month the preliminary employment estimates are revised to incorporate additional later-reporting sample firms and thus draw from more complete survey counts. For the September revised estimates, these additional firms tended to be hiring at a faster rate than the firms that reported in time for the preliminary estimates. This resulted in upward revisions of at least 500 jobs for six of the 13 major industries.

Additional revisions to the job counts indicate Oregon's economy was a little stronger this year than originally estimated. Payroll employment tallies were revised upward by 2,100 per month for June, July and August. Employment benchmarks occur every three months and incorporate updated data from employers.

Over the past 12 months, Oregon's expansion was strong and diverse. Since October 2014, payrolls grew by 54,800 jobs, or 3.2 percent – faster than the U.S. growth of 2.0 percent. Gains in Oregon were consistent across many industries, with seven of the 13 major industries expanding by between 3.2 percent and 4.4 percent. The two industries expanding the fastest were health care and social assistance (+4.4%) and construction (+3.8%). Meanwhile, nearly every other industry grew by about 2 percent. ■

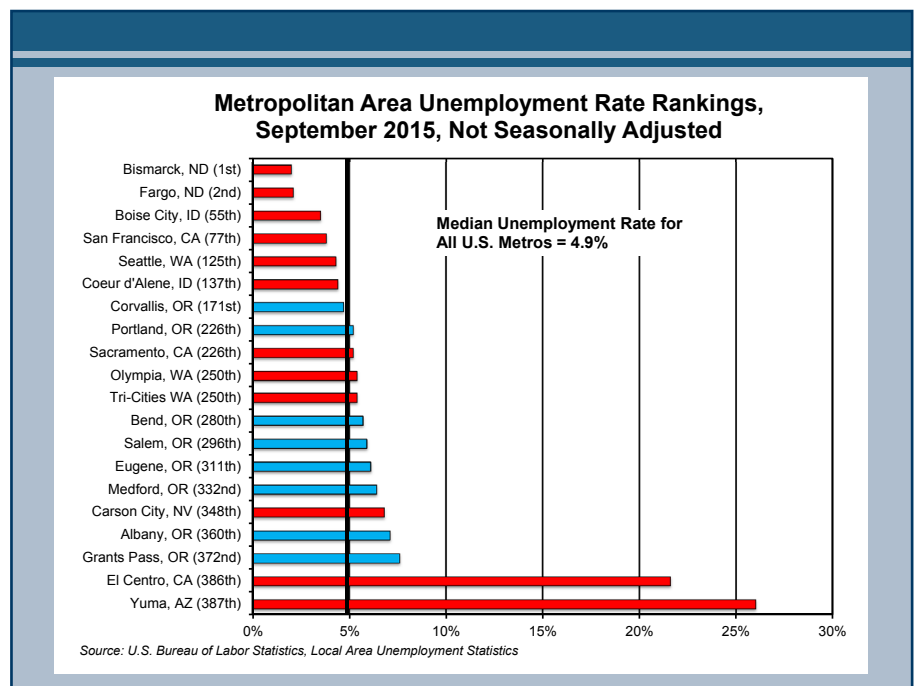
## Unemployment Rate Rankings in Metropolitan Areas

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Unemployment rates in 353 of the 387 metro areas were lower in September 2015 than in September 2014. The national rate came in at 4.9 percent (not seasonally adjusted), down from 5.7 percent in September 2014.

Bismarck, ND had the lowest unemployment rate (2.0%) of any metro area in the nation, while Yuma, AZ had the highest rate (26.0%).

The Corvallis (4.7%) metro area's unemployment rate was lower than the national rate. Portland (5.2%), Bend (5.7%), Salem (5.9%), Eugene (6.1%), and Medford (6.4%) had unemployment rates higher than the national rate, but all of these rates were down compared with September 2014.

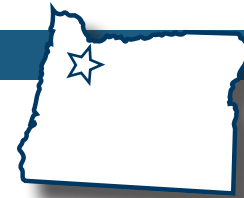


Albany and Grants Pass are now also included among the state's MSAs. Albany's unemployment rate (7.1%)

came in at 360th among the nation's MSAs, while Grants Pass came in at 372nd (7.6%). ■

**LOCAL HIGHLIGHTS:**

# Benton County's Employment Growth Since the Recession



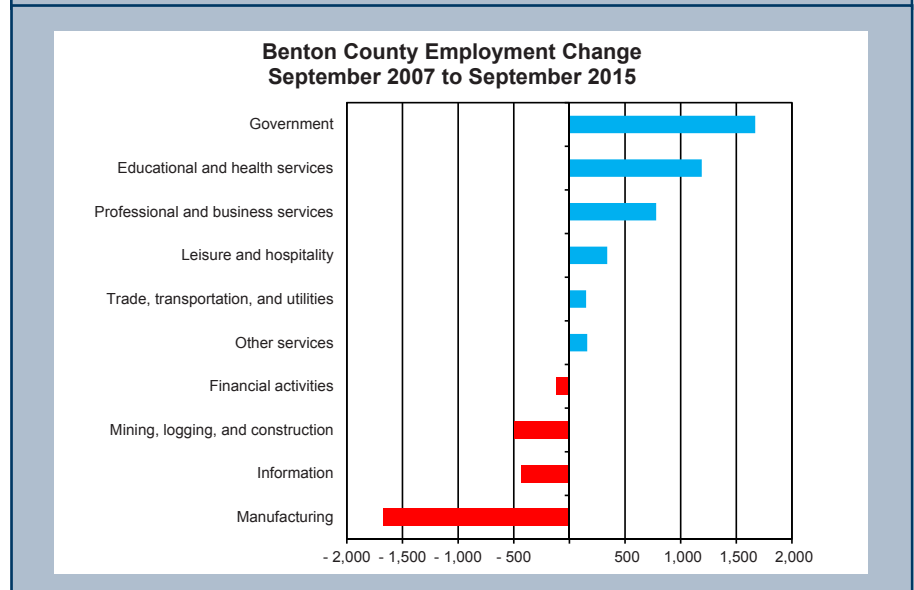
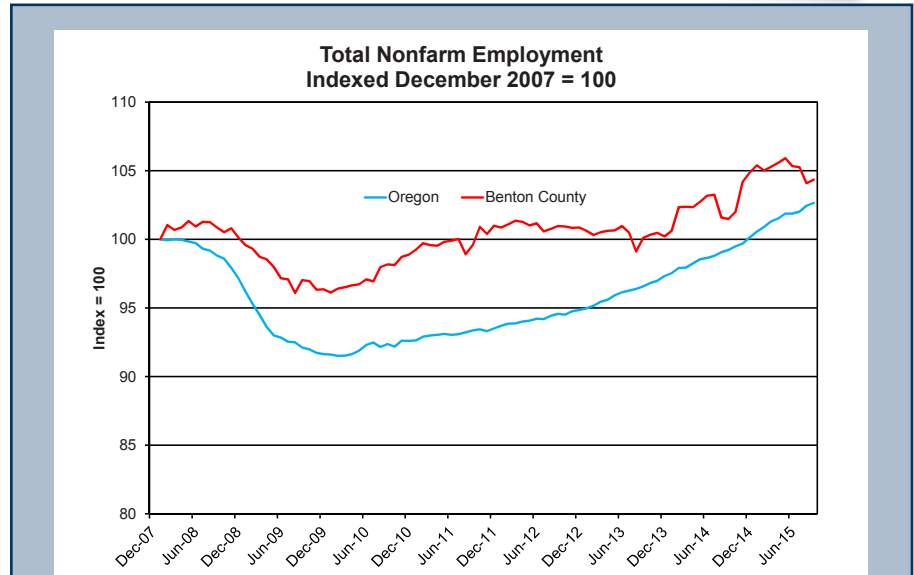
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As of September 2015, 25 of Oregon's 36 counties still had nonfarm employment levels below their peak employment prior to the recession. Benton County can count itself among the 11 counties that have employment above their pre-recession peak. Oregon's pre-recession employment peak was in December 2007.

Benton County's employment did not drop as dramatically as did Oregon's employment during the 2008 and 2009 recession. Like the rest of the state and the nation, Benton County's manufacturing and construction sectors experienced large employment losses. In fact, more than 1,600, or one out of three manufacturing jobs, have disappeared in Benton County since 2007.

However, one thing Benton County has that is fairly unique is Oregon State University. In recent years, student enrollment has reached all-time highs at many of Oregon's universities and colleges, and Oregon State University is no exception. The increased enrollment has driven employment growth as well. From September 2007 to September 2015, employment in state government education grew 24 percent, adding 1,800 jobs in Benton County. The employment growth in state government education helped buoy the county's economy during the recession. This explains why Benton County didn't experience nearly as sharp a drop in total employment compared with the state, despite the deep employment losses in manufacturing.

A trend in Benton County that is not very unique has been the double-digit percentage growth in health care from 2007 to 2015. Health care employment has grown 23 percent and added more than 1,100 jobs. Health care is one of the few industries that managed to gain



employment during the recession, both in Oregon and nationally.

Oregon regained its pre-recession peak employment in November 2014. Benton County regained its peak employment back in February 2012 for just one month. Following that one month, employment went back down below its pre-recession peak and stayed there until January 2014, when the county again regained its pre-recession peak

employment level. It has kept growing since then.

Benton County's September 2015 employment was 2.9 percent above its pre-recession peak, while Oregon was up 2.3 percent.

*For more information on a specific area, visit [QualityInfo.org](http://QualityInfo.org), then choose an area on the map. ■*

# Software Publishing: Oregon Has an App for That

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The software publishing industry has been steadily carving out a niche in Oregon over the last few decades. Although the Bay Area and Seattle might garner more attention, Oregon companies have been innovating and adding jobs since the early 1990s. Currently, only three other states have a greater concentration of employment in this industry: Massachusetts, Utah, and Washington.

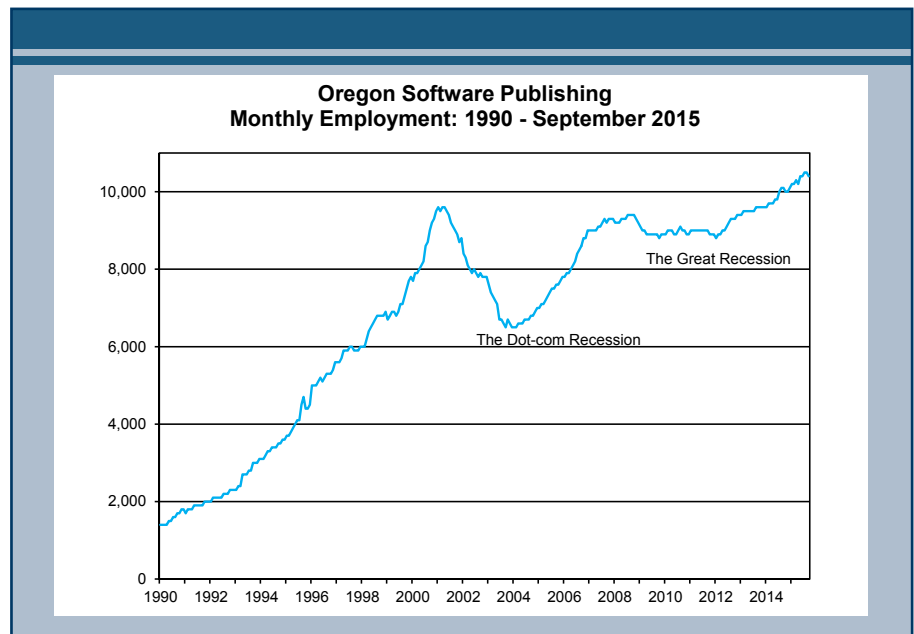
Firms in this sector design, develop, and publish software that address a variety of consumer needs including financial management, social networking, mobile services, business intelligence, Internet security, and open source development. Their services are in high demand as most organizations today depend on software technology to run their business and operate more efficiently.

Oregon software publishers work on a vast array of products. You might not recognize their names, but chances are you've used one of their products. Symantec, initially known for Norton Antivirus, has become a leader in computer security software. In Portland, Janrain develops software that allows websites to accept logins from Facebook, LinkedIn, and Twitter. A few blocks away, Tripwire's working on data security and Jive is creating social networking software for businesses. The list, over 600 strong, goes on.

## Recession? What Recession?

Oregon's software publishing industry saw explosive growth in the 1990s as the Internet became a way of life. Employment rose from 1,600 jobs in 1990 – a year before the World Wide Web became publicly available – to 8,500 jobs by 2000; a rate of growth 15 times faster than the overall economy.

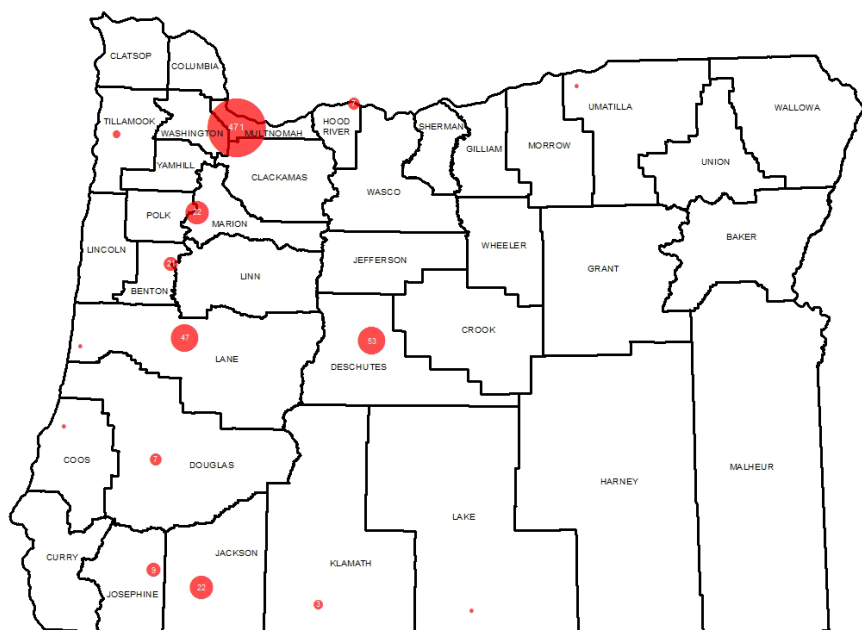
Employment peaked in 2001, and then the dot-com bubble burst. Nationally, business spending on software came to a screeching halt after five years of annual gains averaging 20 percent.



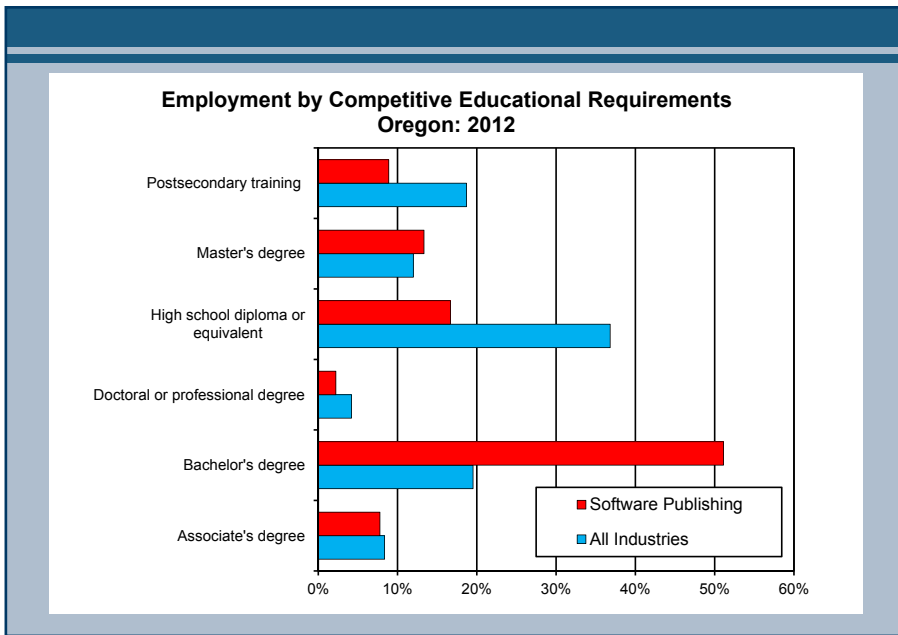
Oregon's software industry lost more than one-quarter of its job base over the next three years.

Job growth resumed in 2004, and by 2008 employment reached record highs – just in time for the second recession of the decade. But while many industries in Oregon suffered steep jobs losses during the Great Recession, software publishers remained relatively unscathed. After just a year of mild losses, the industry

held steady in 2010 and 2011 before growth resumed in 2012. According to Alex Yoder, CEO of Portland-based Web analytics firm WebTrends, the industry remained strong because even in difficult times businesses still need technology to boost productivity and increase efficiency. He contrasts this with the recession of 2001-2003, when web-based technology was less mature and not as integral to business operations and success.







**Small Firms Clustered in Metro Areas**

From Ashland to Scappoose, Florence to Ontario, more than 700 software publishing firms employ nearly 11,000 people across Oregon. The vast majority are located west of the Cascades, clustered in urban centers along the I-5 corridor. The Portland metro area is home to two-thirds of all jobs and the Eugene-Springfield metro area has nearly two out of 10 (see map on page 5). East of the Cascades, the Bend metro area has a small but growing, sector (300 jobs; 3.2% of statewide employment). Drilling down to the city level, over half of the state's software publishing jobs are located in just three cities: Portland, Hillsboro, and Beaverton.

With a few exceptions, Oregon software publishing firms are small. Three-quarters employ fewer than 10 workers, nearly identical to the pattern for all industries. The median firm size is two employees.

**College Degree (Usually) Required, Just Rewards**

Innovating, designing, coding, and supporting such a wide array of dynamic and complex products requires a well-educated and highly skilled workforce. If you were to meet someone who works at one of these firms, there's a better than 50-50 chance they hold a bachelor's degree: more than half of the nearly 100 occupations populating this industry require one.

These occupations, led by software developers and computer user support specialists, account for close to 80 percent of industry-wide employment. To put this in perspective, just 20 percent of all Oregon jobs call for a bachelor's degree. Conversely, short-term training isn't a very viable option for most jobs in software publishing.

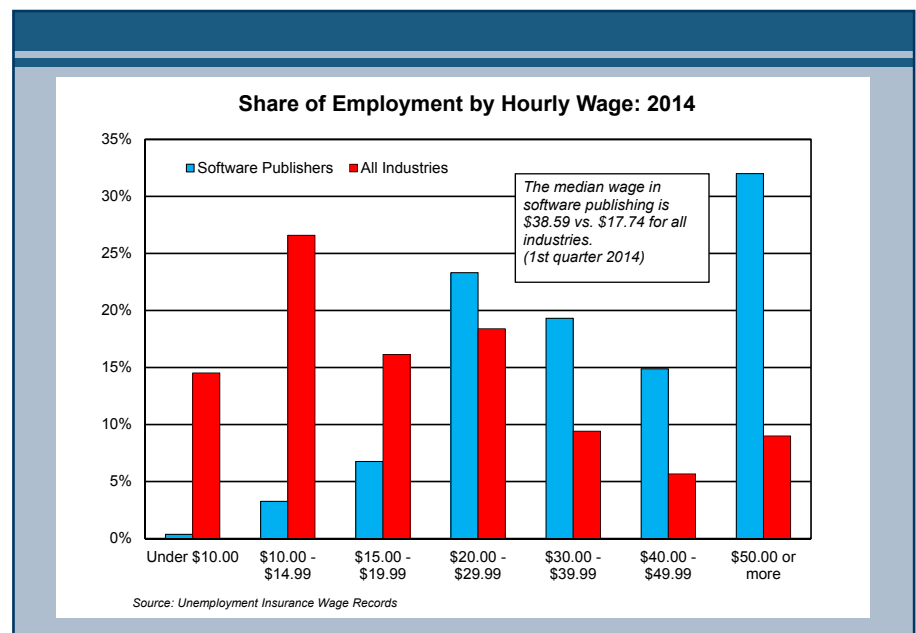
High earnings go hand in hand with the emphasis on high-level technical skills and education. The average wage topped \$98,000 in 2014. It's not just a handful of well-compensated CEOs bringing up the average- almost half of all workers earn \$40 an hour or

more, and nearly one-third earn \$50 hourly. Overall, the median wage in software publishing is \$38.59 per hour, more than double the median wage for all industries (\$17.74).

**Young Men**

The stereotypical image of a software worker might be that of a young man wearing glasses. While we don't have statistics on eyewear, age and gender data show that the rest of this image is largely accurate. The vast majority of workers in software publishing are male; 70 percent compared with 50 percent across all industries. And young. Sixty percent of the workforce is under 45 years old; a greater concentration than the 55 percent across all industries.

Software publishing's younger workforce reflects the industry's relative newcomer status along with its rapid growth. Twenty years ago software was just beginning to come onto the scene. Yet half of today's workers were already in the workforce back then, learning skills and heading down career paths that likely had little to do with this very small, largely unknown, and highly technical sector. It's the recent graduates who are more apt to possess the education and latest skills required of many software occupations, and therefore better prepared to fill the thousands of jobs that have been created over the past decade.

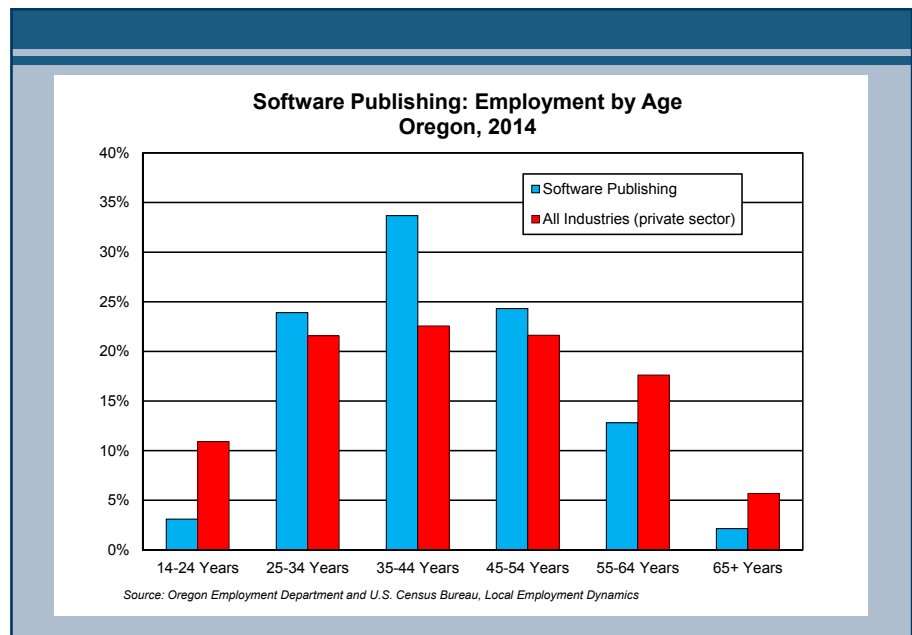


## The Future Looks Bright

In Oregon, job growth will outpace most industries. Between 2012 and 2022, the Oregon Employment Department projects software publishers to grow by 27 percent, an increase of 2,500 jobs. In comparison, total statewide growth is projected to be 15 percent during this same time period. Our optimism is fueled not only by national trends in this industry, but by our growing reputation as a place for start-ups and innovation.

## But Wait, There's More!

Packaged software, the focus of this analysis, is written for mass distribution. However, there's quite a bit of software development work outside the publishing industry. About 1,500 firms in Oregon are engaged in writing custom computer software; products developed with the specific needs of a particular customer in mind. They employ 4,700 people as of 2014 and are quite small (three employees, on average). With annual wages of \$86,700, they pay better than the average for all



industries (\$46,500) yet less than their counterparts in software publishing (\$98,000).

This industry, like software publishing, barely noticed the recession. Employment inched up in 2008 and 2009,

before taking off in 2010. Over the next three years, it expanded by about 1,000 jobs. Growth was undoubtedly buoyed by private investment; companies in this industry attract much of the state's venture capital, including Urban Airship, Shop Igniter, and Act-On. ■

# Power to the People – Oregon's Utilities Industry

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Oregon's utilities industry is unusual in several ways. It is small, high-paying, and has a significant public-sector component.

Compared with other industries in 2014, it was second only to mining for the fewest number of enterprises (470) and employees (8,700). Its annual average wage of \$82,728 was second only to the \$109,800 paid by the management of companies and enterprises industry (which includes holding company and corporate offices). Excluding general government itself, utilities had the second-largest share (48%) of public-sector employment of all Oregon industries. Only educational services (public schools), with 79 percent of its employment in the public sector, had a larger share.

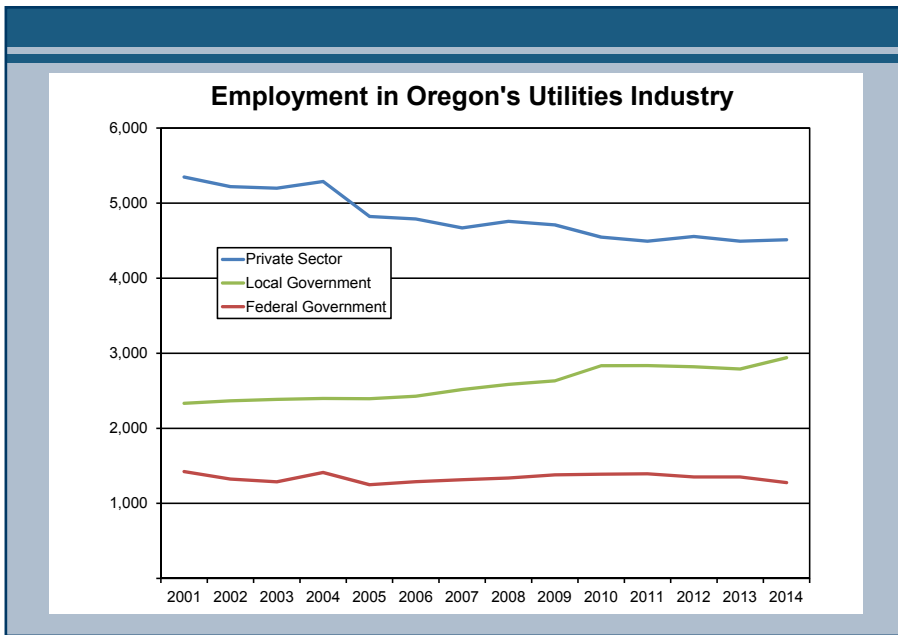
## Industrial Makeup

The utilities industry is split into three main sub industries: electric power, natural gas distribution, and water and sewage systems. About 58 percent of the industry's employment was in electric power in 2014, 28 percent was in water and sewage, and 14 percent was in natural gas distribution.

Electric power includes generation as well as transmission and distribution. This industry provided roughly 5,100 jobs in 2014. It includes large enterprises, such as federal Bonneville Power and private-sector Portland General Electric, medium-sized public utility districts, and small businesses such as Farm Power Northwest, which converts cow manure to methane to electricity. There is a variety of specific electric generation industries in Oregon: hydropower, fossil fuel, and wind power – but one thing we technically don't have is a solar power firm.

This is because finance and tax considerations are usually very important in renewable energy projects. Firms, such as EDF Renewable Energy and Obsidian Renewables, which do have solar projects in Oregon, may be classified in the finance industry.

Natural gas distribution is the smallest part of Oregon's utilities industry in terms of employment. In 2014, natural gas distribution provided about 1,200 jobs. This is because of the more restrictive definition of which firms are included in the industry. Distribution does not include companies that extract oil and gas (those firms are in the mining industry). Nor does it include firms that primarily transport gas from processing plants to local distribution networks, as they are in the pipeline transportation industry. The main reason for the industry's small size is simply that natural gas distribution is not labor intensive; a big windstorm



has little effect on buried pipelines. Northwest Natural is an important company in this industry, serving more than 700,000 homes and businesses.

Water and sewage systems include public and private enterprises, such as city water departments, rural water districts, irrigation districts, sanitary districts, and private contractors that operate these systems. An example of the latter is Veolia North America, which operates a wastewater treatment plant for the City of Gresham. This industry is characterized by its small scale and large public-sector component. The average size for a water or sewage enterprise is a little less than nine employees, and 83 percent of the employment is public sector. Because it is expensive to move water out of its natural drainage, and having a reliable supply of water is so important, people often prefer small, local systems that preclude economies of scale. The result in 2014 was 290 water and sewage enterprises for Oregon's 36 counties.

The industry's employment was less in 2014 than in 2001, but that is largely due to a drop of about 600 jobs in 2005. This was the same year that decommissioning ended at the Trojan nuclear power plant.

Employment since the recession has been fairly stable, and even growing in the local government utilities. Water

and sewage utilities are also growing slowly.

### Socialism and Capitalism Both Seem to Work Here

Utilities are often described by economists as being natural monopolies. For example, having multiple enterprises construct separate electricity networks to cover the same area would greatly increase the cost to deliver the same total amount of electricity to consumers. The lowest-cost solution is to have just one provider. In addition there is usually little difference in the product they offer.

Electricity from one supplier is little different than electricity from another supplier, so there is little opportunity to differentiate products and develop brand loyalty. For these reasons utility companies often function as monopolies in their service areas.

As anyone who has played the popular board game about monopolies knows, running a monopoly allows its owners to wield a good deal of power. Compared with competitive markets, monopolies tend to set higher prices and produce less output. As a result, society typically has either regulated utilities to ensure that prices and output are controlled, or owned them outright and subjected them to the control of publicly elected officials.

Are privately owned utilities better or worse than publicly owned ones? Your author conducted exhaustive scientific research at his home (private electric company) and at work (public electric company), and discovered that the lights usually work at both places. More seriously, the quality of utilities services is apt to be more related to levels of capital investment and the competence of management than ownership. Whether prices are lower for public or private utilities is a complex issue beyond the scope of this paper. There are some employment differences between public and private utilities, however.

Occupation	Employment	Average Wage
Electrical Power-Line Installers and Repairers	457	\$42.15
Customer Service Representatives	332	\$21.64
Power Plant Operators	266	\$34.20
Water and Wastewater Treatment Plant and System Operators	207	\$19.26
Electrical Engineers	186	\$40.04
Control and Valve Installers and Repairers	171	\$31.41
Plumbers, Pipefitters, and Steamfitters	147	\$28.55
General and Operations Managers	141	\$63.65
Office Clerks, General	132	\$19.36
Bookkeeping, Accounting, and Auditing Clerks	94	\$22.94
Supervisors and Managers of Mechanics, Installers, and Repairers	86	\$42.42
Electrical and Electronics Repairers, Powerhouse, Substation, and Relay	85	\$39.26
Wind Turbine Service Technicians	83	\$26.91



Wages are different between public and private utilities in Oregon. The average wage for all workers in the broad utilities industry was \$82,700 in 2014, but this masks the difference between public and private utilities. The average wage at privately owned utilities was \$90,500, for federal utility workers it was \$92,900, and at local government utilities it was \$66,600. It is probable that the mix of occupations is different for the different ownerships, and that this accounts for some of the difference in wages.

**The average wage for all workers in the broad utilities industry was \$82,700 in 2014, but this masks the difference between public and private utilities.**

Although private-sector utilities companies are smaller on average than local government ones, the very biggest utilities companies in the state are private sector. In fact, the three largest

employ more than 500 people each. This may, in part, explain the higher wages for the top earners. Larger enterprises can achieve economies of scale that are denied to smaller operations, and this can allow large enterprises to earn disproportionate operating revenue. This is true for public or private enterprises. It is likely that the higher wages in the public sector are also earned at larger public enterprises, although no local government utility has 500 employees. It just so happens that the largest utilities companies in Oregon are in the private sector.

**Occupations**

Roughly 60 occupations were common in Oregon’s utilities industry in

2014. Not surprisingly, many of the occupations require considerable skill. Power line installers, plant operators, engineers and similar technical jobs often require post-secondary education and apprenticeships.

As usual, higher skill results in higher pay. Many of the common occupations have average wages above \$30 per hour. The most common single occupation, electrical power-line installers and repairers, had an average wage of \$42 per hour. Training to be a power-line installer can begin at a community college program, such as the Energy Systems Maintenance Technician certificate from Clackamas Community College. Apprenticeships to become a journeyman outside lineman are offered by the Joint Apprenticeship and Training Committee of the Northwest Line Construction Industry. Information, including internet links to training providers, about all the utilities occupations is available at [QualityInfo.org](http://QualityInfo.org). ■

# Educational Attainment of Workers in Oregon’s Industries

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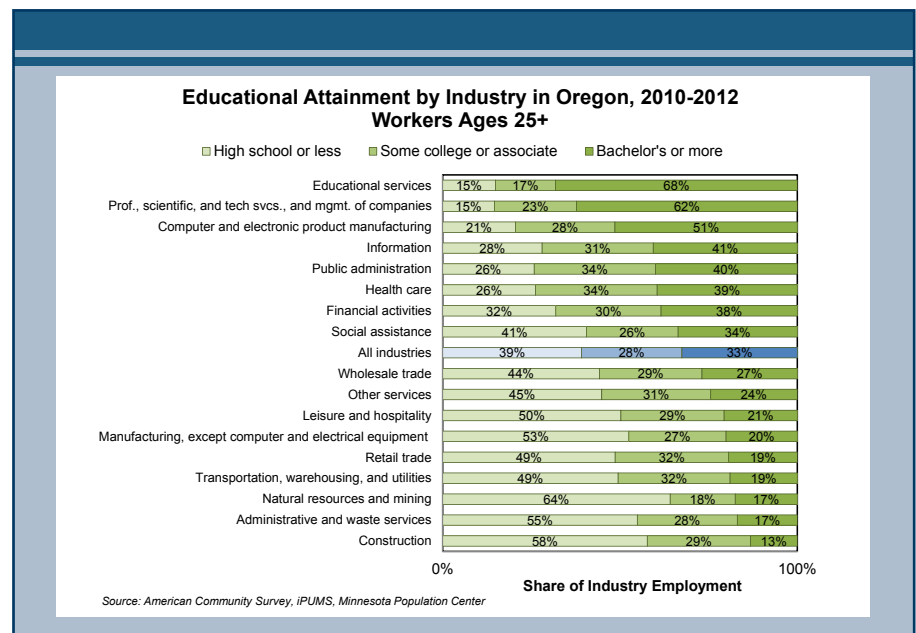
The Minnesota Population Center maintains public use microdata for the U.S. Census Bureau’s American Community Survey, which includes information on the educational attainment of workers and their industry of employment. According to the 2010-2012 three-year estimates (the most current available), one-third (33%) of Oregon workers ages 25 and older held a bachelor’s or advanced degree. Another 28 percent of employed Oregonians completed some college or earned an associate degree, while 39 percent had a high school diploma or less education.

degree. In 2012, the largest occupations in educational services included postsecondary teachers, elementary school teachers, and secondary school teachers. All of these professions generally require a bachelor’s or advanced degree.

The industry with the second-highest share of highly educated workers was professional and technical services. The industry’s top occupations in 2012 included accountants, lawyers, legal secretaries, bookkeepers, and software developers. A bachelor’s degree

**Education Requires Higher Education**

In two services industries – educational services and professional and technical services – a majority of workers earned at least a bachelor’s



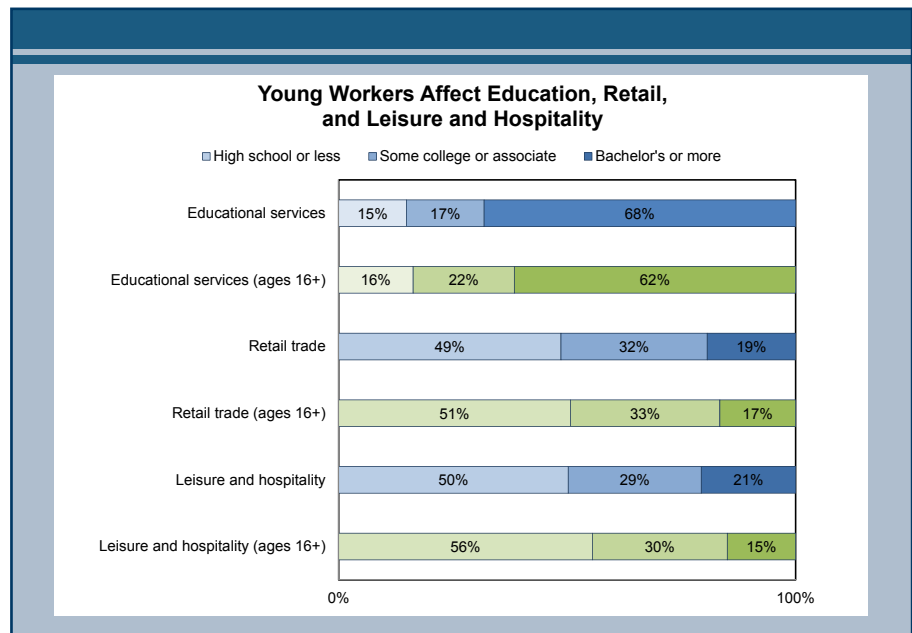
is typically required for accountants and software developers. Lawyers generally must complete a professional degree (J.D.) to practice. Legal secretaries and bookkeepers generally need a postsecondary award or an associate degree.

In computer and electronic manufacturing, more than half (51%) of workers had bachelor's or advanced degrees. The largest occupations in this industry were also more evenly balanced in terms of educational requirements in 2012. Both electrical and electronic equipment assemblers and semiconductor processors jobs generally require a high school diploma, while the various engineering-related occupations concentrated in the industry generally require higher education.

Other industries with relatively high shares of highly educated workers included information (which includes software publishing and broadcast news), public administration, health care, financial activities, and social assistance.

### More "Hands On" Industries Require Less Class Time

At the other end of the spectrum, the majority of the workforce in three industries earned a high school diploma or less: natural resources and mining (64%); construction (58%); and administrative and waste services (55%). In these three industries, as well as retail trade and transportation and warehousing, less than one-fifth of all workers had at least a bachelor's degree.



### Industries with More Workers Ages 16 to 24

Half of all workers in leisure and hospitality and retail trade earned a high school diploma at most. The graph shows workers ages 25 and older, who we assume to have generally completed their educational pursuits. We might expect the shares of workers with less than a bachelor's degree to jump in these two industries when we factor in workers ages 16 to 24 – and that's true! When we also account for Oregon's youngest workers (many of whom are presumably increasing their educational attainment), the share of the industry's workforce with less than a bachelor's degree rises from 81 percent to 84 percent in retail,

and from 79 percent to 86 percent in leisure and hospitality.

Those in the process of completing additional education also show up in the educational services numbers. That makes sense, especially if you are, or at one time were, someone in an on-campus job while attending a college or university. As we expect, the bump in educational services workers is largely due to those with some college or associate degree education (presumably many are on their way to a bachelor's).

*More information about the American Community Survey public use micro-data can be found at [usa.ipums.org](http://usa.ipums.org).* ■

## Hispanic-Owned Businesses in Oregon

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Hispanics have become the largest minority group in the U.S. and they continue to grow, so it is no surprise that the number of Hispanic-owned businesses is also on the rise. This is true for Oregon as well, where the Hispanic population has grown from 112,700 in 1990 to 474,200 in 2012.

This is a growth rate of nearly 321 percent over 22 years. This growth has increased the Hispanic population's share of Oregon's population from about 4 percent in 1990 to 13 percent today; however, this is still below the Hispanic share of the total United States population (17%).

The Economic Census Survey of Business Owners (produced every five years) indicates that Oregon's Hispanic-owned businesses grew from

3,500 in 1992 to 15,500 in 2012 for a total growth rate of 339 percent. During that same period, non-Hispanic-owned businesses in Oregon grew by 38 percent, going from 235,400 businesses in 1992 to 323,800 businesses in 2012. These numbers include both businesses with and without employees.

Overall, there were more than 3.3 million Hispanic-owned businesses in the United States in 2012 and they represented over \$517 billion in sales, re-

ceipts, and shipments. By comparison, in total there were nearly 27.6 million businesses in the U.S. with and without employees that represented \$33.5 trillion in sales, receipts, and shipments.

### Oregon's Hispanic-Owned Businesses

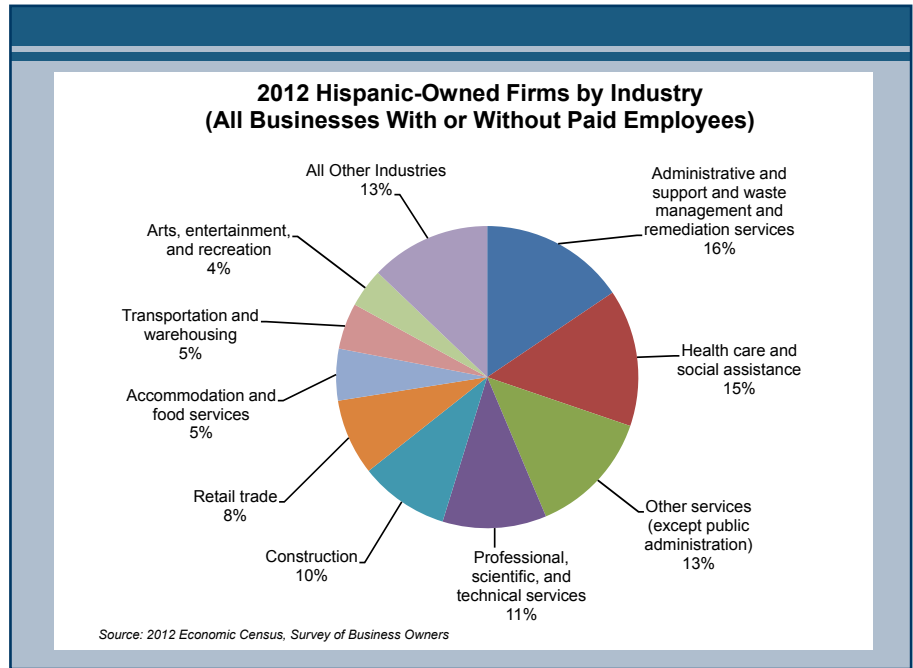
Oregon ranked 21<sup>st</sup> among all states in the number of Hispanic-owned businesses and 28<sup>th</sup> in terms of sales, receipts, and shipments. In the Northwest, Oregon ranked second behind Washington in number of Hispanic-owned businesses, with 15,500 and 24,600, respectively.

Oregon, Washington, Montana, Idaho, and Alaska combined represent only 2 percent of all Hispanic-owned businesses in the United States, but 8 percent of all sales, receipts, and shipments. Most of this is due to businesses in Washington, which ranked fourth in total sales, receipts, and shipments of all states. California, Texas, and Florida alone account for 80 percent of all Hispanic-owned businesses in the United States and 70 percent of total sales, receipts, and shipments.

About 16 percent (2,500) of Hispanic-owned businesses in Oregon have employees. Hispanic-owned businesses with employees averaged just over seven employees per business and paid an average annual wage of \$26,500. That ranked 37<sup>th</sup> in the United States for Hispanic-owned businesses with employees. The national average was \$31,200.

The total dollar value of sales, receipts, and shipments for all Oregon Hispanic-owned businesses in 2012 amounted to just under \$2.3 billion, which would represent roughly 1 percent of Oregon's real GDP in that same year (\$199 billion) as reported by the U.S. Bureau of Economic Analysis.

Despite being the largest minority population in Oregon, Hispanics rank second (37%) in business ownership to non-Hispanic Asians who represent 38 percent or 16,000 out of Oregon's 41,800 minority owned businesses. Non-Hispanic black or African American and non-Hispanic American Indian and Alaska Natives represented 11 percent and 10 percent of the minority owned businesses, respectively.



### Distribution by Industry

Hispanics own businesses in every major industry sector. While the most visible sectors are retail trade and accommodation and food services, which represented 13 percent of all Hispanic-owned businesses, the largest sectors for Hispanics were in the administrative and support and waste management and remediation services sector (16%) and health care and social assistance (15%). The third-largest sector was "other services (except public administration)" which includes activities from auto repair maintenance to personal care services and non-veterinary pet care. This sector represented 13 percent of all Hispanic-owned businesses in Oregon.

*"Diversity is a key driver of innovation and is a critical component of being successful on a global scale... And as companies compete on a global scale, diversity and inclusion frequently have to shift, as different markets and different cultures have varied definitions of what diversity means." (Global Diversity and Inclusion: Fostering Innovation through a Diverse Workforce. Forbes.com July 2011)*

### Conclusion

Hispanics have become an integral part of the diverse fabric of our economy, both as consumers and as businesses. They, along with the other minority-owned businesses are adding an opportunity to increase their market share of American-made products, by adding to them the cultural nuance that says we understand and care about our customers worldwide. They also enrich us with a whole new array of goods and services from which to choose locally. ■

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# Paper Cuts: Oregon's Declining Paper Industry

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Employment in paper manufacturing in Oregon has declined for decades, but it remains an important industry in the state. Paper manufacturing provides about 4,500 jobs in Oregon, down from around 10,000 in 1976. In 1976 paper manufacturing accounted for a little more than 5 percent of Oregon's manufacturing jobs; in 2015 its share is down to 2.5 percent of manufacturing employment. In this respect it is similar to the wood products industry, which fell from about 40 percent of Oregon's manufacturing jobs to about 12 percent over the period.

## The Industry

Paper manufacturing began in Oregon with the Pioneer Paper Manufacturing Company in 1866, but the mill closed in less than a year. The Clackamas Paper Manufacturing Company opened in 1868 and was followed by Willamette Pulp and Paper in 1889 near Oregon City. The Crown Mill opened in 1890, and Hawley Pulp and Paper opened in 1909. Some of the early mills struggled with uncertain manufacturing processes and could not produce enough paper to be profitable. Newsprint was an important product for early mills.

The modern paper industry in Oregon has two major divisions: the pulp and paper manufacturing side with 10 facilities, and the converted paper products (such as box making) side that has 41 facilities. There are a multitude of types of paper manufactured: containerboard, tissue, newsprint, paperboard, copy- ing paper, coated



and uncoated, and a nearly-endless list of specialty papers.

## A Long Decline in Oregon

The drop in employment over the years is only partly due to decreasing output. Physical output in 2012 was nearly the same as it was in 2001 yet employment fell by one-third over those years. Output measured by its contribution to Oregon's gross domestic product has always fluctuated. Over

the last 10 years output has varied from \$824 million to \$1.1 billion (2013 dollars), but the industry's employment has steadily declined in Oregon.

Paper is not declining globally. The Food and Agriculture Organization of the United Nations (FAO) forecasts world production of paper and paperboard to increase about 3.0 percent per year through 2020. However, much of the growth will be in Asia and Eastern Europe. Imports and trade

Title	2012 Employment	Percent of Industry's 2015	
		Employment	Median Wage
Paper Goods Machine Setters, Operators, and Tenders	893	18%	\$20.23
Production Workers, All Other	495	10%	\$25.44
Industrial Machinery Mechanics	253	5%	\$32.26
Fork Lift, Industrial Truck and Tractor Operators	212	4%	\$18.92
Laborers and Freight, Stock, and Material Movers, Hand	180	4%	\$16.52
Supervisors and Managers of Production and Operating Workers	145	3%	\$21.77
Packaging and Filling Machine Operators and Tenders	117	2%	NA
Production Worker's Helpers	110	2%	\$12.96
Electricians	109	2%	\$32.61
Engineers, All Other	94	2%	NA
Machine Feeders and Offbearers	90	2%	\$11.47
Customer Service Representatives	87	2%	\$19.57
Team Assemblers	85	2%	NA
Printing Press Operators	83	2%	\$19.33
Wholesale/Mfg. Sales Reps, Except Technical/Scientific Products	75	2%	\$30.47



are important issues for the industry and its unions. Oregon exported \$368 million of paper in 2014 and the U.S. exported \$24.9 billion of paper.

**Occupations in Paper Manufacturing**

Nearly 100 different occupations are employed in Oregon’s paper industry. The most common occupation in the industry is, not surprisingly, paper goods machine setters, operators, and tenders – the people who run paper machines. This one occupation made up about 18 percent of the industry’s workforce in 2012 and paid a median wage of \$20.23 per hour in 2015.

Many jobs in paper manufacturing pay well. The average wage in the industry in 2014 was \$69,781 per year. The average wage for all jobs in Oregon that year was \$46,515.

Manufacturing industries tend to pay higher wages than many other industries, and traded-sector (export) industries also tend to pay higher wages. Paper manufacturing is in both these categories.

Wages are also influenced by the education and training that an occupation requires. Occupations such as manager, mechanic, and electrician require more education and training, and pay more.

**Wage Effect of Unions**

Another reason for high wages is that some paper manufacturers have a unionized workforce, and this partly explains why paper machine operators and production workers have fairly high wages. There appears to be no readily available, public list of firms that have a unionized workforce, but in 2012 officials from two unions, the Association of Western Pulp and Paper Workers and the United Steelworkers, identified eight facilities that had members of their unions. These facilities tended to represent the pulp and paper manufacturing side of the industry and comprised about 55 percent of the jobs. As far as they knew, most of the paper converting firms had nonunionized workers. The average wage in 2011 for the firms that are known to have union workers was about \$77,400. The average wage for the firms that were nonunion or of unknown status was about \$53,200. This was a difference of about \$24,200 per year.

There are differences between these two groups of firms, aside from the union status of their workers. As noted, they tend to be in two different divisions of the industry: manufacturing and converting. They also differ in size; the unionized firms had an aver-

age of 324 employees in 2011 and the nonunion/unknown firms averaged 45 employees.

***The paper industry is not growing, but it is still replacing retiring workers and that provides job openings.***

**Outlook**

From an employment perspective, paper manufacturing is a declining industry. Projections made in 2012 were for the industry to shed another 200 jobs from 2012 to 2022. The industry

appears to be handily beating this estimate; employment dropped by 350 from 2012 to 2014.

Even though total employment in the industry is dropping, that is not the entire story. There are still openings to be filled due to retirement. In all industries combined, about 60 percent of total openings are for replacements, primarily due to retirement and death, and only 40 percent are due to growth of the specific industry. The paper industry is not growing, but it is still replacing retiring workers and that provides job openings. Paper machine operators are a good example of this. The occupation’s total employment is expected to shrink by 50 by 2022, but will have enough people retire to provide a net of 80 openings for new people to enter the occupation in the paper industry due to the need for replacements. A similar situation exists for printing press

**Paper Industry’s Outlook for Selected Occupations in Oregon**

<b>Title</b>	<b>Occupational Openings by 2022</b>	<b>Competitive Education</b>
Production Workers, All Other	129	High school diploma or equivalent
Industrial Machinery Mechanics	103	Postsecondary training (non-degree)
Paper Goods Machine Setters, Operators, and Tenders	80	High school diploma or equivalent
Laborers and Freight, Stock, and Material Movers, Hand Fork Lift, Industrial Truck and Tractor Operators	56	High school diploma or equivalent
Packaging and Filling Machine Operators and Tenders	49	High school diploma or equivalent
Customer Service Representatives	28	High school diploma or equivalent
Electricians	24	High school diploma or equivalent
Supervisors and Managers of Production and Operating Workers	21	Postsecondary training (non-degree)
Production Worker’s Helpers	20	Bachelor’s degree
Machine Feeders and Offbearers	19	High school diploma or equivalent
Engineers, All Other	18	High school diploma or equivalent
Printing Press Operators	17	Master’s degree
Wholesale/Mfg. Sales Reps, Except Technical/Scientific Products	15	High school diploma or equivalent
Team Assemblers	15	Associate’s degree
	13	High school diploma or equivalent



operators. The occupation is expected to shrink by 83 workers by 2022, but 421 openings should be created due to replacement needs and 15 of these will be in the paper industry.

The future of Oregon's paper industry will be influenced by global conditions. The FAO notes that "Paper and paperboard is one of the most globalized commodity groups, with a high share of production exported and a high share of consumption imported." The U.S. is currently negotiating the Trans-Pacific Partnership, a free-trade agreement similar to NAFTA, with Australia, Brunei Darussalam, Chile, Malaysia, New Zealand, Peru, Singapore, and Vietnam. Paper workers' unions expect the agreement to cost jobs in the domestic industry.

Another important factor in the industry's future is the use of recycled paper as an input. The FAO stated that Europe is the largest exporter of paper products and that it has benefited from its high growth in wastepaper recovery. Oregon had been increasing its paper recycling, although the total amount dropped substantially when the recession hit in 2007. The Oregon Department of Environmental Quality estimates that Oregon recovered about 200,000 tons of cardboard in 1992 and increased recovery to more than 400,000 tons by 2007. The percent being disposed in landfills fell from 6.5 percent in the years 1993 to 1995 to 3.3 percent for 2009 to 2010.

Oregon's forests make it a natural place for paper manufacturing. The industry also benefits from abundant water, a well-trained workforce and support for paper recycling. Foreign trade and improvements in technology may limit employment growth, but the industry will have a place in Oregon for years to come. ■

## First Quarter 2015: Jobs and Wages Record Solid Growth

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The number of jobs in Oregon increased by more than 73,700 from the first quarter of 2014 through the first quarter of 2015. Two industries that were hit hard in the Great Recession, manufacturing and natural resources, recorded strong growth rates. Professional and business services and leisure and hospitality also maintained their status as fast-growing industries, with growth rates exceeding 5 percent for the year.

### Growth Varies by Industry

Leisure and hospitality not only added the most jobs (+13,300) of any industry over the year, it also racked up the fastest growth rate (+6.6%). The only downside to the growth in leisure and hospitality was that the industry's median wage remained the lowest (\$10.93/hr.), but even that increased by 3.6 percent over the year.

The slowest employment growth rate occurred in financial activities. The industry is still dealing with the fallout from the Great Recession and regulatory change. The number of jobs in financial activities increased by 1.4 percent over the year. Perhaps in compensation for its slow employment growth, the median wage in financial activities grew 4.5 percent – the most for any industry.

### Large and Medium Firms Add the Most People

Firms with 500 or more employees accounted for nearly half of the growth in employment between the first quarters of 2014 and 2015. These firms added 35,100 jobs over the year, a growth rate of 5.7 percent. Oddly, the next smaller class of firms, those with 250 to 499 employees, added only a few hundred net jobs. Employment picked up again in mid-size firms. Firms in the size classes of 20 to 250 employees grew by anywhere from 4 percent to 5 percent. The size classes with small firms, those with fewer than 20 employees, had growth rates around 2 percent and added about 7,900 jobs.

The employment growth by large firms is doubly important because of the higher wages paid by them. Firms with more than 500 employees had the highest median wage (\$21.66/hr.) of any of the firm size classes. Generally, median wages decreased with firm size, down to \$15.67 per hour. for firms with five to nine employees. The exception is the smallest firms with fewer than five employees. This size class had a median wage of \$17.30 per hour, possibly because the owners' wages are relatively more important when calculating an average for small firms.

### Data

In the wage records, a job represents a single individual's employment with a firm. If the number of jobs increases, it may be due primarily to an increase in the number of positions that firms have, but it may also indicate an increase in the amount of job turnover, or the number and frequency of individuals switching jobs. During periods of economic expansion, both factors are typically related to an increase in the number of jobs. Evidence of this may also be seen in the sharp year-over-year increase in the percentage of workers holding two or more jobs. Part of this is due to an increase in the number of jobs being held simultaneously and part is due to a rise in the rate of individuals changing jobs. ■

## Over the Year Change in Jobs by Industry, Oregon, 1st Quarter 2014 to 1st Quarter 2015

Industry	Under \$10.00 - \$15.00 - \$20.00 - \$30.00 - \$40.00 - \$50.00 - \$60.00 or								Total	Hourly Median Wage
	\$10.00	\$14.99	\$19.99	\$29.99	\$39.99	\$49.99	\$59.99	more		
Total - All Industries	-25,753	34,575	15,728	18,199	10,028	6,215	4,152	10,581	73,725	\$18.02
Natural Resources and Mining	-3,598	5,482	351	885	265	5	-15	-156	3,219	\$12.23
Construction	-626	282	1,255	1,845	-1,073	-388	4	343	1,642	\$22.88
Manufacturing	-1,405	1,516	1,752	3,106	1,308	434	370	766	7,847	\$21.73
Wholesale Trade	-777	-326	435	871	383	250	118	372	1,326	\$21.90
Retail Trade	-1,754	6,646	701	-75	1,965	535	126	703	8,847	\$12.47
Transportation, Warehousing, and Utilities	-679	922	362	1,084	324	196	97	242	2,548	\$20.29
Information	-207	-107	252	-11	151	66	172	483	799	\$29.30
Financial Activities	-846	-1,710	584	716	489	416	585	934	1,168	\$22.26
Professional and Business Services	-5,721	6,412	2,237	1,508	1,991	1,086	1,101	3,774	12,388	\$18.23
Private Educational Services	-239	202	376	624	313	97	36	26	1,435	\$20.00
Health Care & Social Assistance	-3,708	2,994	3,290	3,186	1,112	704	928	1,807	10,313	\$19.27
Leisure and Hospitality	-3,544	11,323	1,871	2,517	738	211	63	132	13,311	\$10.93
Other Services	-1,354	1,452	719	578	379	202	106	242	2,324	\$15.43
State Government	-388	-31	781	453	312	888	234	227	2,476	\$25.22
Local Government	-856	-504	782	915	1,371	1,520	235	672	4,135	\$25.61

## Over the Year Change in Jobs by Firm Size Class, Oregon, 1st Quarter 2014 to 1st Quarter 2015

Firm Size Class	Under \$10.00 - \$15.00 - \$20.00 - \$30.00 - \$40.00 - \$50.00 - \$60.00 or								Total	Hourly Median Wage
	\$10.00	\$14.99	\$19.99	\$29.99	\$39.99	\$49.99	\$59.99	more		
Total - All Size Classes	-25,753	34,575	15,728	18,199	10,028	6,215	4,152	10,581	73,725	\$18.02
Under 5 employees	-1,809	150	763	798	466	484	114	612	1,578	\$17.30
5 - 9 employees	-3,124	2,291	643	1,165	482	312	154	422	2,345	\$15.67
10 - 19 employees	-3,835	2,917	1,985	1,706	408	222	302	283	3,988	\$15.49
20 - 49 employees	-3,705	5,770	2,917	3,527	1,346	609	361	1,017	11,842	\$16.11
50 - 99 employees	-2,902	4,529	1,497	1,490	545	318	209	1,311	6,997	\$17.00
100 - 249 employees	-3,242	6,667	1,747	2,073	964	872	711	1,506	11,298	\$17.19
250 - 499 employees	-4,805	1,528	-372	1,559	777	935	368	593	583	\$18.20
500 or more employees	-2,331	10,723	6,548	5,881	5,040	2,463	1,933	4,837	35,094	\$21.66

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## Oregon Current Labor Force and Industry Employment

	October 2015	September 2015	October 2014	Change From September 2015	Change From October 2014
<b>Labor Force Status</b>					
Civilian labor force	1,981,638	1,968,134	1,967,556	13,504	14,082
Unemployed	106,111	111,016	126,283	-4,905	-20,172
Unemployment rate	5.4	5.6	6.4	-0.2	-1.0
Unemployment rate, seasonally adjusted	6.0	6.2	6.8	-0.2	-0.8
Employed	1,875,527	1,857,118	1,841,273	18,409	34,254
<b>Other Labor Force Indicators</b>					
Labor force participation rate, seasonally adjusted	60.9	60.6	61.5	0.3	-0.6
Labor underutilization rate – U-6, seasonally adjusted	12.3	12.5	13.5	-0.2	-1.2
<b>Nonfarm Payroll Employment</b>					
Total nonfarm payroll employment	1,805,400	1,790,100	1,752,800	15,300	52,600
Total private	1,497,400	1,499,800	1,451,500	-2,400	45,900
Mining and logging	7,900	8,000	7,800	-100	100
Construction	85,400	86,100	82,200	-700	3,200
Manufacturing	187,100	189,000	182,700	-1,900	4,400
Durable goods	129,700	130,200	127,300	-500	2,400
Nondurable goods	57,400	58,800	55,400	-1,400	2,000
Trade, transportation, and utilities	339,500	339,900	330,800	-400	8,700
Wholesale trade	74,900	75,100	73,200	-200	1,700
Retail trade	205,500	205,000	199,800	500	5,700
Transportation, warehousing, and utilities	59,100	59,800	57,800	-700	1,300
Information	32,800	32,900	32,200	-100	600
Financial activities	95,700	95,300	93,700	400	2,000
Professional and business services	232,200	230,400	224,000	1,800	8,200
Professional and technical services	89,400	88,500	85,400	900	4,000
Management of companies and enterprises	43,700	43,400	40,800	300	2,900
Administrative and waste services	99,100	98,500	97,800	600	1,300
Educational and health services	264,200	259,900	254,300	4,300	9,900
Educational services	37,200	34,900	37,500	2,300	-300
Health care and social assistance	227,000	225,000	216,800	2,000	10,200
Leisure and hospitality	191,000	196,500	184,100	-5,500	6,900
Other services	61,600	61,800	59,700	-200	1,900
Government	308,000	290,300	301,300	17,700	6,700
Federal government	28,000	28,600	27,700	-600	300
State government	88,700	82,700	86,300	6,000	2,400
State education	34,500	27,600	33,800	6,900	700
Local government	191,300	179,000	187,300	12,300	4,000
Local education	101,300	88,800	99,200	12,500	2,100
Labor-management disputes	200	200	0	0	200

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.

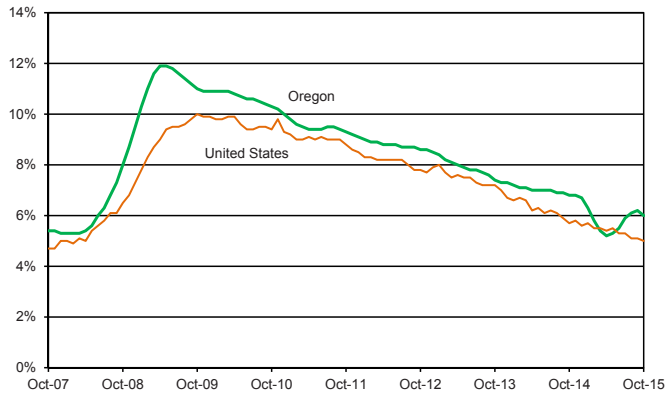
Labor Force Status: Civilian labor force includes employed and unemployed individuals 16 years and older by place of residence. Employed includes nonfarm payroll employment, self-employed, unpaid family workers, domestics, agriculture and labor disputants. Unemployment rate is calculated by dividing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

U-6 is the total unemployed plus all persons marginally attached to the labor force plus total employed part-time for economic reasons, as a percent of the civilian labor force plus all persons marginally attached to the 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. These survey-based estimates are revised quarterly, based on more complete information from employer tax records.

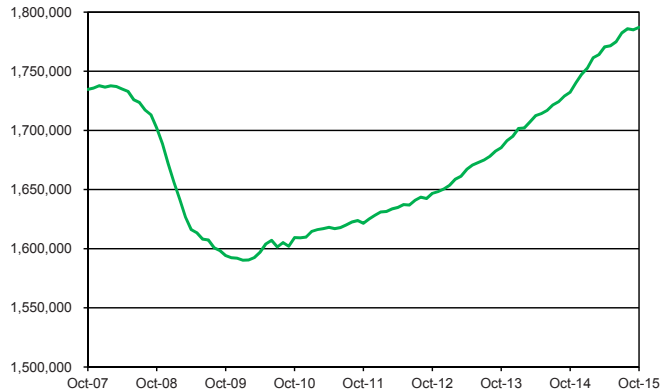
## Unemployment Rates

**Oregon's Unemployment Edges Down in October**  
Unemployment Rates, Seasonally Adjusted



## Total Nonfarm Payroll Employment

**Oregon's Employment Rises in October**  
Oregon Nonfarm Payroll Employment, Seasonally Adjusted



## Indicators

### Unemployment Rate (Seasonally adjusted)

	Oregon	U.S.
Oct. 2015	6.0	5.0
Sept. 2015	6.2	5.1
Oct. 2014	6.8	5.7

### Seasonally Adjusted Employment (Total Nonfarm Payroll Jobs)

	Oregon	U.S.
Oct. 2015	1,787,100	142,654,000
Sept. 2015	1,785,000	142,383,000
Oct. 2014	1,732,300	139,840,000
Change From		
Oct. 2014	54,300	2,814,000
% Change	3.2%	2.0%

### Consumer Price Index (CPI) (All urban consumers, 1982-84=100)

Port.-Salem, OR-WA	Index	Yearly Change
Jan.-June 2015	242.976	1.3%
Annual Average 2014	241.215	2.4%
<b>United States</b>		
Sept. 2015	237.838	0.2%
Annual Average 2014	236.736	1.6%



# OREGON LABOR TRENDS

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