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INDUSTRY AND DEMOGRAPHIC ANALYSIS  
**OF**  
**EAST MULTNOMAH COUNTY AND SUBSETS**

Prepared for  
West Columbia Gorge Chamber of Commerce

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**DATA SOURCES**  
**STRENGTHS AND CHARACTERISTICS**

The Data used for this report is based on 2004 Quarterly Census of Employment and Wages (QCEW), the 2000 Decennial Census, and Oregon Wage Information (OWI).

**Oregon's 2004 Employment and Wage Data**

Wage and employment data is collected for purposes of unemployment insurance taxes. The data is aggregated in such a way as to protect the confidentiality of our business customers. This means that, the smaller the areas under study, the greater the confidentiality issues and lesser the number of industry breakouts we are able to provide. In some instances, we simply cannot aggregate certain data. In those instances, the data will be replaced with a capital letter "D."

**Using Geographic Information Systems (GIS) Technology**

The geographic distribution of the data is dependent on the addresses of reported employment. In many instances, multi-site businesses have only one centralized reporting location for all sites. This may cause certain distortions in the data such as over-reporting in one area while under-reporting in another area. Another possible distortion are businesses that use external payroll and accounting services and report the address of those outsourced companies as the business address, these can be single site or multi-site businesses. Because the reported address is not the actual work address, cases of under / over-reporting for geographic areas may occur for the same reasons as with multiple site employers with centralized reporting.

In the process of developing our new geographic information system (G.I.S.), we have worked to minimize the impact of these limitations by working with multi-site businesses, and companies that outsource payroll and accounting, to provide employment and wage breakouts by actual work locations. This has allowed us to provide data that fluctuates between 90-95% accuracy. We continue to work on improving the quality of this data.

Another factor that is unique to the GIS system is that it uses a variety of electronic street maps, which may vary in accuracy based on how often the maps are updated, changes in street configurations, recent construction, etc. This may prevent some addresses from being properly located. In those instances, depending on how much detail is available regarding the address, the system places the business in the nearest zip code level center (5 to 9 digit zip code level). In geographically small zip code areas, this usually is not a problem. However, in rural areas where zip code areas tend to be extremely large, this can cause issues similar to those related to multi-site companies with centralized reporting. The advantage of using GIS is that we can aggregate data based on very specific area definitions such as school districts, cities, and in some cases to uniquely defined areas such as business and industry corridors, urban renewal areas, etc.

### North American Industry Code System (NAICS)

Employment and wage data is aggregated by industry using the North American Industry Classification System (NAICS). NAICS replaces the Standard Industry Code in order to provide a system that allows comparing industry performance among all countries involved in the North American Free Trade Agreement (NAFTA). It also allows greater flexibility to adjust to changes in the economy and emerging new industries.

### Census Bureau's 2000 Decennial Census Population Data

Table 1 Census line items used in this study

P001	Total population
P019	English proficiency for populations five years of age or older
P027	Place of work for population 16 years or older
P031	Travel time to work for population 16 years or older
P037	Education attainment of population 25 years or older
P049	Primary industry of employment for population 16 year or older (minus Public Administration)
P050	Primary occupation of employment for population 16 year or older
P053	Median household income
P059	Households with earnings - Total
Average household earnings from wages / salaries and self employment ( P067 Aggregate household earnings divided by P059 Households with earnings)	
Average household earnings from wages / salaries ( P068 Aggregate household earnings from wages and salaries divided by P059 Households with earnings)	
Average household earnings from self-employment (P069 Aggregate household earnings from self-employment divided by P059 Households with earnings)	

Population data was selected from the 2000 Decennial Census based on census data frequently asked for as part of business planning. The data indicates population characteristics that somewhat describes the area's labor force as it was like in 1,999. The line items used for this study are provided in Table 1.

# City of Cascade Locks Area

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## City of Cascade Locks

### General Industry and Population Data

This segment identifies the proportion of businesses, jobs and working age population of East Multnomah County located in the City of Cascade Locks. This will be the base for comparison for the more detailed level of data. The detailed level will focus on industry mix and size as well as population characteristics commonly requested by businesses in doing market or site analysis.

In 2004, there were 39 business establishments located within the City of Cascade Locks Area representing half of one percent of all establishments in East Multnomah. These businesses employed 308 workers or the equivalent of 0.5 percent of all jobs in East Multnomah, for an average of 9 jobs per business, about the average for all of East Multnomah County.

Given the confidentiality constraints caused by the limited number of businesses per industry group, the breakout information is limited. Because of this, any discussion as to which industry has the most average number of jobs per establishment or which industry had the most employment may not be the best reflection of the real industry job distribution. However, we do offer a limited breakout in Table 2 below.

### Supply and Demand of Labor

There was there were almost 50% more people, age 16 and over, who worked outside the home than there were jobs in the City of Cascade Locks Area. In the City of Cascade Locks Area, 218 people of the 460 who worked outside the

home traveled over 30 minutes to work. This means that a significant portion (52.6 %) of the available workforce worked within Cascade Locks or commuted to Stevenson, Carson River Valley and North Bonneville which are all within 15 to 30 minutes away.

Having more people than jobs in an area does not guarantee that the mix of skills and experience needed, are available in the local workforce. The census offers insight into the population's work skills and experience. Because skills are components of occupations and experience is related to the work environment or industry, we look at the distribution of population by primary industry and occupation of employment. This is by no means an exact measure of the skill and experience mix of the population, but it is the best source available at this moment.

### *Industries*

When comparing Table 2 (2004 Private Industry Covered Employment) with Table 3 (Primary Industry of Employment – 2000 Census —) within the limited breakouts available from Table 2 we note that in those industries for which breakouts were possible, the distribution was similar to the surrounding areas, but with even greater surpluses of workers by industry (See Graphic 1). City of Cascade Locks appears to be a preferred place of residence for people who work in manufacturing, since 18.2 % of the population indicated this was their primary industry of employment. Construction, retail, and accommodation and food services followed as most represented industries of employment of the population in Cascade Locks with 12.7 %, 12.5 %, and 11.0 % respectively.

### *Occupations*

The dominant occupation of employment in City of Cascade Locks was in the sales and office occupation group (29.0%). People in management, business and finance occupations came in second at 10.6 %, trailed closely by Production workers at 10.2 percent. All other occupations breakouts were each below six percent of the total number of working population. (See Table 4)

### **Additional Demographic Characteristics**

Businesses regularly ask for a few standard demographic data to gauge the makeup and tendencies of the population in the community where they will operate in. This report focuses on those characteristics that relate to the population as a labor force. Income data is also included as a way to gauge the living standards of the population in this area.

Characteristics such as commuting patterns, educational attainment, and language proficiency define some of the key characteristics of a diverse and viable labor force and offers alternatives in the global market environments. (See table 5)

By-en-large people in the City of Cascade Locks Area worked outside the home (96.6 percent). Of those who worked outside the home 52.6 percent commuted less than 30 minutes to work, which is well below the figures for the entire state (72.6%). This means that a significant proportion of people in City of Cascade Locks commuted over 30 minutes than did people in the entire state (47.4 % versus 27.4 %).

As more companies position themselves to compete in a global market setting, they are more flexible when working with non-native English speakers. Despite this, some level of proficiency in English is still important to most businesses. In City of Cascade Locks, 11.8 percent of the population speaks a language other than English at home. Of those speaking another language at home, 84.2 percent speak English "very-well" or "well", while 8.9 percent do not speak English "At All".

Another characteristic in today's labor markets is the growing gap between high paying jobs and low paying jobs, and the roll education plays in employability. In City of Cascade Locks 18.2 percent of the population 25 years of age and older have less than a High School diploma (That is almost the same as in East Multnomah County), 29.4 percent have a High School diploma or equivalent with no college. Meanwhile, 13.9 percent have an associates degree or higher. Businesses also view workers as a consumer base, so this study adds household income data that shows the median and average household income (See table 6). In City of Cascade Locks, the median and average household income was below that of households in East Multnomah County. City of Cascade Locks median annual household income was \$35,284 and the average was \$39,809 as compared to the \$41,094 and \$41,374 respectively in all of East County. This income level was also comparable to that of City of Fairview which had just over \$1,100 more average income and almost \$6,000 difference in median income.

Table 3 Primary Industries of Employment (minus public administration)

<b>Working Population - City of Cascade Locks</b>		
Industry	Total	Percent
Agriculture, forestry, fishing and hunting, and mining	13	2.9%
Construction	58	12.7%
Manufacturing	83	18.2%
Wholesale trade	8	1.8%
Retail trade	57	12.5%
Transportation and warehousing, and utilities	35	7.7%
Information	12	2.6%
Finance, insurance, real estate and rental and leasing	15	3.3%
Professional, scientific, and technical services	15	3.3%
Management of companies and enterprises	0	0.0%
Administrative and support and waste management	17	3.7%
Educational services	37	8.1%
Healthcare and social assistance	26	5.7%
Arts, entertainment, and recreation	7	1.5%
Accommodations and food services	50	11.0%
Other services (except public administration)	22	4.8%
<b>TOTAL</b>	<b>455</b>	

Source: U.S. Census Bureau, 2000 decennial census

Table 2 City of Cascade Locks Area – Private Industry Covered Employment

NAICS	Industry	Business Units	Average Monthly Employment	Total Annual Payroll	Average Annual Wage
23	Construction	4	20	\$ 948,184.00	\$ 47,807.60
31-33	Manufacturing	7	141	\$ 3,624,810.00	\$ 25,768.79
44-45	Retail Trade	7	34	\$ 478,693.00	\$ 13,942.51
72	Accommodation and food services	8	98	\$ 1,368,603.00	\$ 13,918.00
99	All Other non-disclosable (/1)	10	15	\$ 345,353.00	\$ 23,282.22
	<b>Total All Industries</b>	<b>36</b>	<b>308</b>	<b>\$ 6,765,643.00</b>	<b>\$ 21,966.37</b>

(/1) This category includes all the industries listed below

- 11 Agriculture
- 53 Real estate and leasing
- 54 Professional, scientific and technical
- 56 Administrative and support and Waste Management
- 71 Arts, entertainment and recreation
- 81 Other Services

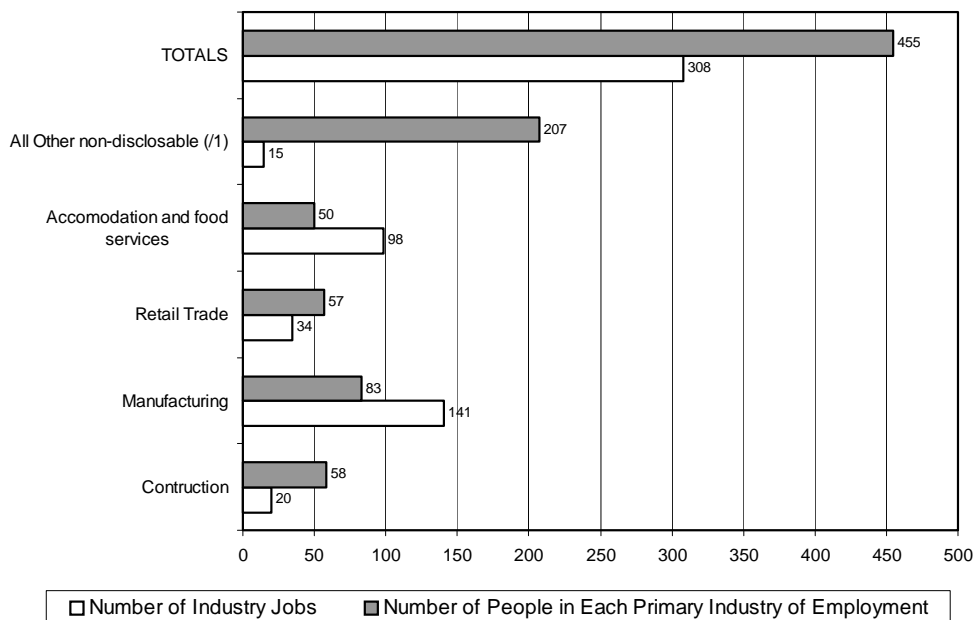
Source: Oregon Employment Department, Quarterly Census of Employment and Wages (QCEW) – 2004 totals

Table 4 Primary Occupation of Employment

Working Population - City of Cascade Locks				
SOC	Occupational Title	Total	Percent	
11 & 13	Management, business, and financial operations	21	4.2%	
15	Computer and mathematical	6	1.2%	
17	Architecture and engineering	12	2.4%	
19	Life, physical, and social sciences	8	1.6%	
21	Community and social services	12	2.4%	
23	Legal	2	0.4%	
25	Education, training and library	18	3.6%	
27	Arts, design, entertainment, sports, and media	3	0.6%	
29	Healthcare practitioners and technical	1	0.2%	
31	Healthcare support	12	2.4%	
33	Protective services	10	2.0%	
35	Food preparation and serving	36	7.3%	
37	Building and grounds cleaning and maintenance	20	4.0%	
39	Personal care and services	11	2.2%	
41 & 43	Sales and office	120	24.2%	
45	Farming, fishing, and forestry	7	1.4%	
47	Construction and extraction	55	11.1%	
49	Installation, maintenance, and repair	32	6.5%	
51	Production Occupations	59	11.9%	
53	Transportation and material moving	50	10.1%	
<b>TOTAL</b>		<b>495</b>		

Source: U.S. Census Bureau, 2000 Decennial Census

Graphic 1 Jobs and People Comparison – City of Cascade Locks Area



Source: Oregon Employment Department, 2004 Quarterly Census of Employment and Wages (QCEW) and U.S. Census Bureau, 2000 Census

Table 5 Quick Demographic Statistics – City of Cascade Locks Area

**City of Cascade Locks**

	<b>Total</b>	<b>Percent</b>
<b>Total Population</b>	<b>1,115</b>	
<b>Population 18 to 64</b>	<b>667</b>	<b>59.8%</b>
<b>Working Population (Pop. 16 yrs &amp; older)</b>	<b>476</b>	<b>42.7%</b>
Worked in place of residence	153	32.1%
Worked outside place of residence	323	67.9%
Worked from home	16	3.4%
Worked outside home	460	96.6%
<b>Travel Time to Work (Pop. 16 yrs &amp; older who worked outside home)</b>	<b>460</b>	<b>41.3%</b>
Less than 5 minutes	80	17.4%
5 to 14 minutes	94	20.4%
15 to 29 minutes	68	14.8%
30 to 44 minute	87	18.9%
45 minutes or more	131	28.5%
<b>Primary language spoken at home (Pop. 5yrs &amp; older) All Languages</b>	<b>1,041</b>	<b>93.4%</b>
Speaks only English	921	88.5%
Speaks other than English	120	11.5%
and Speaks English "Very Well"	71	59.2%
and Speaks English "Well"	30	25.0%
and Speaks English "Not Well"	14	11.7%
and Speaks English "Not at All"	5	4.2%
<b>Educational Attainment pop 25 yrs and over total</b>	<b>715</b>	<b>67.3%</b>
Less than Highschool diploma or equivalent	130	18.2%
Highschool diploma or equivalent	257	35.9%
Some College (no degree)	229	32.0%
Associate Degree	38	5.3%
Bachellor Degree	54	7.6%
Graduate degree	7	1.0%

Source: U.S. Census Bureau, 2000 decennial census

Table 6 Household Income - City of Cascade Locks Area (with breakout by type of earnings)

<b>Number of Households:</b>	431
<b>Average Household Income in 1999</b>	\$ 39,808.82
<b>Median household income in 1999</b>	\$ 35,284.00
<b>Per capita income in 1999</b>	\$ 15,359.00

Source: U.S. Census Bureau, 2000 Decennial Census