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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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December 2004

DATA SOURCES STRENGTHS AND CHARACTERISTICS

The Data used for this report is based on 2002 Quarterly Census of Employment and Wages (QCEW), the 2000 Decennial Census, and Oregon Wage Information (OWI).

Oregon's 2002 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.

While wage data could not be aggregated by the major occupation sectors seen in the tables covering population primary occupation of employment, we added an appendix that offers wages for many of the individual occupations found in each of these major occupation sectors. The wage data is derived from the 2002 Oregon Wage Information (OWI) database.

Oregon Wage Information (OWI)

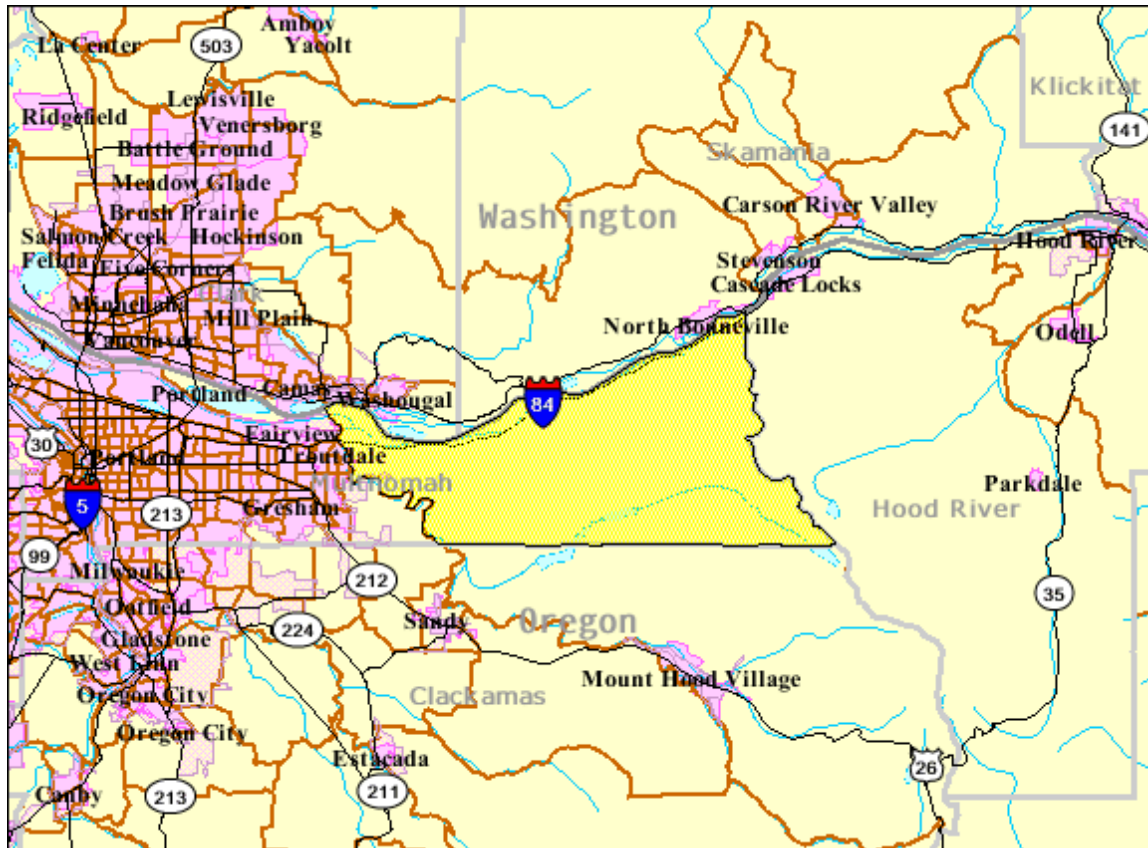
Wage data presented in the *Oregon Wage Information 2004* are collected through the Occupational Employment Survey (OES), a semi-annual survey measuring occupational employment and wage rates for payroll workers by industry. In Oregon, the survey samples more than 6,000 establishments a year, taking three years to fully collect the sample of 19,000 establishments. Each year, one-third of the establishments are surveyed, with all industries covered each year of the three-year cycle. The OES survey is sent to Oregon employers and is required by Bureau of Labor Statistics (BLS) regulation to achieve at least a 75 percent response rate.

Data in this publication are based on the 1999, 2000, 2001 and 2002 surveys. The wage data are adjusted to 2004 using the Employment Cost Index. Occupations having a mean wage with a relative standard error greater than 10 percent are not considered statistically valid and therefore are not published. More than 95 percent of all Oregonians working for wages or salary in the private and public sectors work in the occupations represented in this publication. The Oregon Employment Department compiles wage rates for more than 650 occupations.

The OES survey defines employment as workers covered by unemployment insurance. This excludes the self-employed, owners or partners of unincorporated firms, unpaid family workers and some commission-based sales agents. Wages paid to these excluded groups are not reflected in the wages reported.

Corbett & Bridal Veil Area

(Census Tract 105, Multnomah)



Corbett and Bridal Veil Area

(Census Tract 105, Multnomah)

General Industry and Population Data

This segment identifies the proportion of businesses, jobs and working age population of East Multnomah County located in the Corbett and Bridal Veil Area. 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 2002, there were 67 business establishments located within the Corbett-Bridal Veil Area representing one percent of all establishments in East Multnomah. These businesses employed 318 workers or 0.5 percent of all jobs in East Multnomah during the same period, for an average of 5 jobs per business, less than half 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 almost six times the number of people, age 16 and over, who worked outside the home than there were jobs in the Corbett-Bridal Veil Area. In the Corbett-Bridal Veil Area, over 1,000 people traveled over 30 minutes to work. This means that a significant portion (almost 57 %) of the available workforce worked outside the Corbett-Bridal Veil Area. Corbett-Bridal Veil truly reflects the concept of a bedroom community, with the difference that the number of people commuting less than 15 minutes to work (244) is less than the number of jobs in the area. This indicates that about one fourth of the jobs in this area are filled with people from outside this area.

Having significantly 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 (2002 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). Corbett-Bridal Veil appears to be a preferred place of residence for people who work in manufacturing, since 15.3% of the population indicated this was their primary industry of employment. Construction, healthcare and social services, and accommodation and food services followed as most represented industries of employment with 13.3 %, 9.1 %, and 11.4 % respectively.

Occupations

The dominant occupation of employment in Corbett-Bridal Veil was in the sales and office occupation group (27.7%). People in management, business and finance occupations came in second at 14.1 percent. All other occupations breakouts were each below nine percent of the total number of the working population, this occupational distribution is consistent with the rest of East Multnomah County. (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, 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)

With the Corbett-Bridal Veil area being predominantly rural, we have to rely on travel time to work to get a better sense of commuting patterns to work, as there is very little households living in areas the Census considers a "place" (city, town, neighborhood, etc).

By-en-large people in the Corbett-Bridal Veil Area worked outside the home (94.1 percent). Of those who worked outside the home 43.4 percent commuted less than 30 minutes to work, which is well below the figures for the entire state (72.6%). This means that a greater proportion of people in Corbett-Bridal Veil commuted over 30 minutes than did people in the entire state (56.6 % 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 Corbett-Bridal Veil, this is less important than for the entire East Multnomah County. In Corbett-Bridal Veil, only 3.9 percent of the population speaks a language other than English at home, which is almost 5 times less than East Multnomah County as a whole. This is even less than half the distribution of population who speaks a language other than English at home in Troutdale (8.6 %). Of that 6.7 percent of the people who speak another language at home, 94.3 percent speak English "very-well" and the remaining percent speak it "well".

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 Corbett-Bridal Veil only 5.4 percent of the population 25 years of age and older have less than a High School diploma (That is 13.4 percent less than in East Multnomah County), 26.6 percent have a High School diploma or equivalent with no college. By contrast, over 25.4 percent of the population of Corbett-Bridal Veil had a bachelor's degree or better in 1999, which is 8.3 percent higher proportion than for the entire East County.

Businesses also view workers as a consumer base, so this study adds household income data that shows the median household income (See table 6). The data shows how many households receive earning from either wages or self-employment and how much income was generated from each source. In Corbett-Bridal Veil, the median household income was the highest in all of East Multnomah County. Corbett-Bridal Veil's median annual household income was \$21,500 higher than the median for all of East County and just over \$6,000 higher than in Troutdale which was the third highest, Spring Water came in second \$3,000 less than Corbett-Bridal Veil.

Table 2 Corbett - Bridal Veil Area – Private Industry Covered Employment

NAICS	Industry	Business Units	Average Monthly Employment	Total Annual Payroll	Average Annual Wage
23	Construction	14	58	\$ 1,742,123.00	\$ 29,993.51
42	Wholesale Trade	6	8	\$ 484,690.00	\$ 57,586.93
44-45	Retail Trade	4	11	\$ 131,880.00	\$ 12,363.75
54	Professional, scientific and technical services	8	17	\$ 463,580.00	\$ 27,004.66
81	Other Services (except public administration)	11	57	\$ 758,676.00	\$ 13,310.11
99	All Other non-disclosable (/1)	24	166	\$ 3,011,849.00	\$ 18,116.38
	Total All Industries	67	318	\$ 6,592,798.00	\$ 20,759.27

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

- 11 Agriculture
- 31-33 Manufacturing
- 51 Information
- 52 Finance and Insurance
- 53 Real Estate and Leasing
- 56 Admin
- 61 Education
- 62 Health Care and Social Services
- 71 Arts, entertainment and recreation
- 72 Accommodation and Food Services

Source: Oregon Employment Department, Quarterly Census of Employment and Wages (QCEW) – 2002 totals

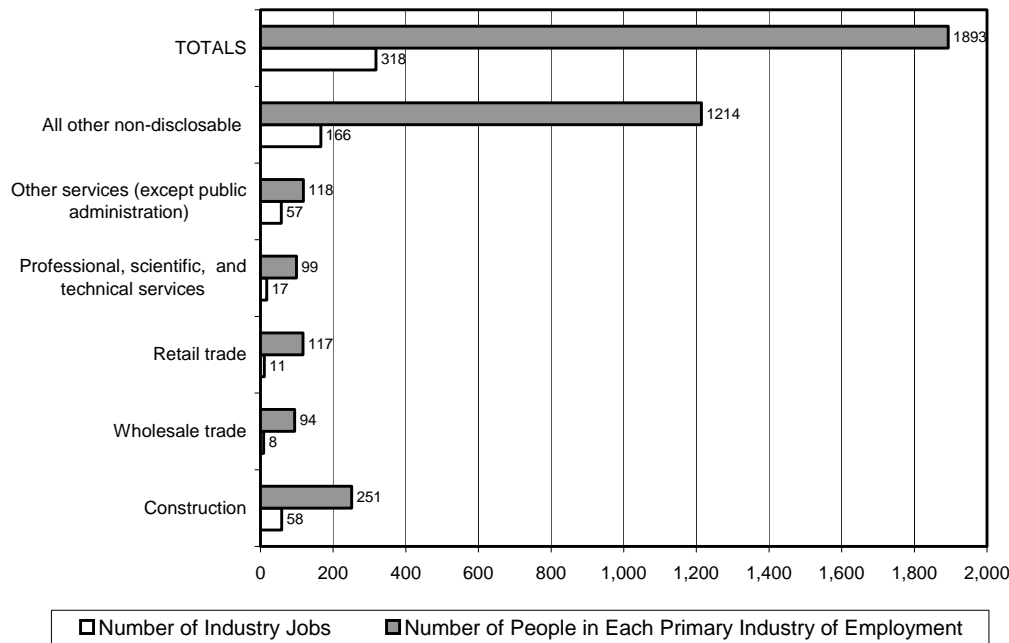
Table 2 Primary Industries of Employment (minus public administration)

Working Population - Corbett - Bridal Veil (CT 105)

Industry	Total	Percent
Agriculture, forestry, fishing and hunting, and mining	60	3.2%
Construction	251	13.3%
Manufacturing	290	15.3%
Wholesale trade	94	5.0%
Retail trade	117	6.2%
Transportation and warehousing, and utilities	146	7.7%
Information	80	4.2%
Finance, insurance, real estate and rental and leasing	106	5.6%
Professional, scientific, and technical services	99	5.2%
Management of companies and enterprises	0	0.0%
Administrative and support and waste management	38	2.0%
Educational services	122	6.4%
Healthcare and social assistance	173	9.1%
Arts, entertainment, and recreation	50	2.6%
Accommodations and food services	149	7.9%
Other services (except public administration)	118	6.2%
TOTAL	1,893	

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

Graphic 1 Jobs and People Comparison – Corbett - Bridal Veil Area



Source: Oregon Employment Department, 2002 Quarterly Census of Employment and Wages (QCEW) and U.S. Census Bureau, 2000 Census

Table 4 Primary Occupation of Employment

Working Population - Corbett - Bridal Veil (CT 105)

SOC	Occupational Title	Total	Percent
11 & 13	Management, business, and financial operations	285	14.1%
15	Computer and mathematical	24	1.2%
17	Architecture and engineering	70	3.5%
19	Life, physical, and social sciences	13	0.6%
21	Community and social services	17	0.8%
23	Legal	29	1.4%
25	Education, training and library	77	3.8%
27	Arts, design, entertainment, sports, and media	60	3.0%
29	Healthcare practitioners and technical	81	4.0%
31	Healthcare support	14	0.7%
33	Protective services	42	2.1%
35	Food preparation and serving	101	5.0%
37	Building and grounds cleaning and maintenance	41	2.0%
39	Personal care and services	69	3.4%
41 & 43	Sales and office	560	27.7%
45	Farming, fishing, and forestry	32	1.6%
47	Construction and extraction	179	8.9%
49	Installation, maintenance, and repair	70	3.5%
51	Production Occupations	122	6.0%
53	Transportation and material moving	133	6.6%
TOTAL		2,019	

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

Table 5 Quick Demographic Statistics – Corbett - Bridal Veil Area

Bridal Veil - Corbett (CT 105)

	Total	Percent
Total Population	3,751	
Population 18 to 64	2,852	76.0%
Working Population (Pop. 16 yrs & older)	1,969	52.5%
Worked in place of residence	13	0.7%
Worked outside place of residence	33	1.7%
Worked from home	117	5.9%
Worked outside home	1,852	94.1%
Travel Time to Work (Pop. 16 yrs & older who worked outside home)	1,852	49.4%
Less than 5 minutes	39	2.1%
5 to 14 minutes	205	11.1%
15 to 29 minutes	559	30.2%
30 to 44 minute	670	36.2%
45 minutes or more	379	20.5%
Primary language spoken at home (Pop. 5yrs & older) All Languages	3,578	95.4%
Speaks only English	3,438	96.1%
Speaks other than English	140	3.9%
and Speaks English "Very Well"	132	94.3%
and Speaks English "Well"	8	5.7%
and Speaks English "Not Well"	0	0.0%
and Speaks English "Not at All"	0	0.0%
Educational Attainment pop 25 yrs and over total	2,523	67.3%
Less than Highschool diploma or equivalent	136	5.4%
Highschool diploma or equivalent	672	26.6%
Some College (no degree)	858	34.0%
Associate Degree	216	8.6%
Bachelior Degree	422	16.7%
Graduate degree	219	8.7%

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

Table 6 Household Income - Corbett-Bridal Veil Area (with breakout by type of earnings)

Number of Households:	1,318
Average Household Income in 1999	\$ 70,339.61
Median household income in 1999	\$ 62,604.00
Per capita income in 1999	\$ 25,189.00

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