

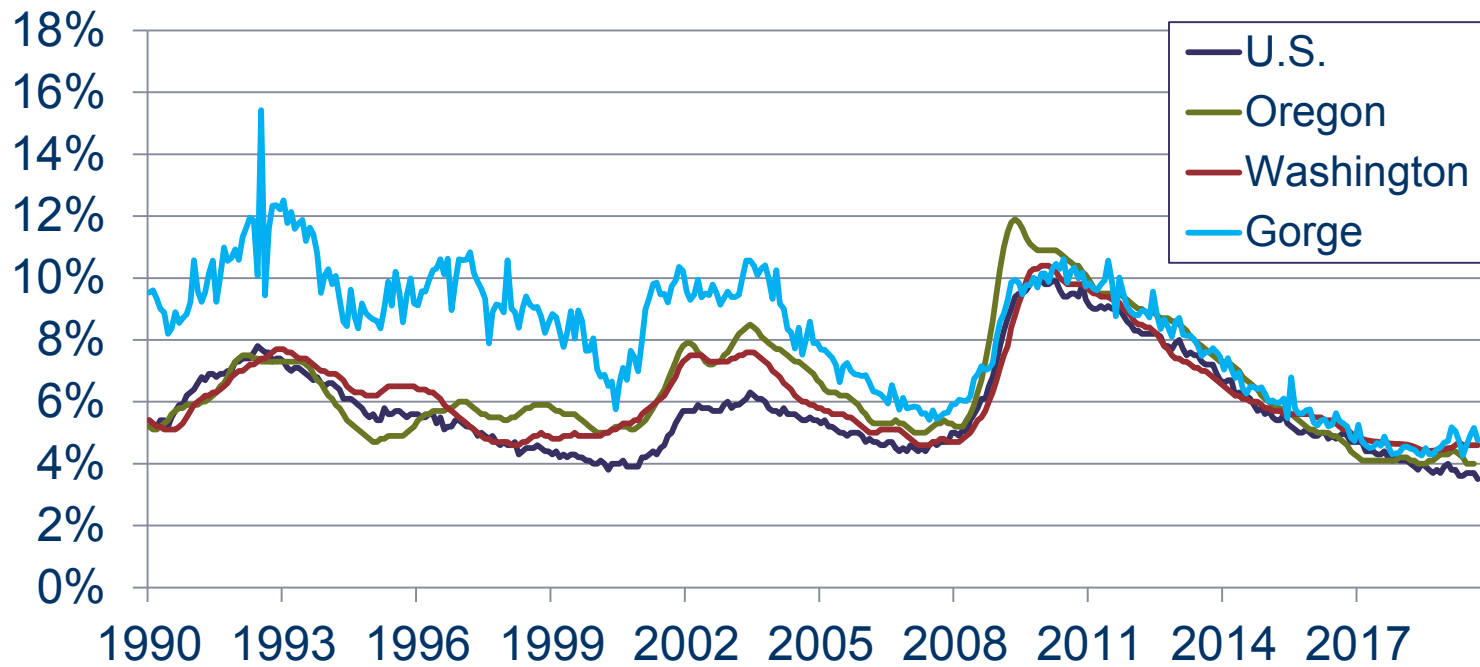
ECONOMIC TRENDS IN THE COLUMBIA GORGE: 2001-2018

Unemployment, September 2019

- National rate: 3.5 percent
- Oregon: 4.1 percent
- Washington: 4.6 percent
- Hood River: 3.4 percent
- Klickitat County: **6.5 percent**
- Sherman County: 4.1 percent
- Skamania County: **5.7 percent**
- Wasco County: 4.5 percent

Unemployment Rates

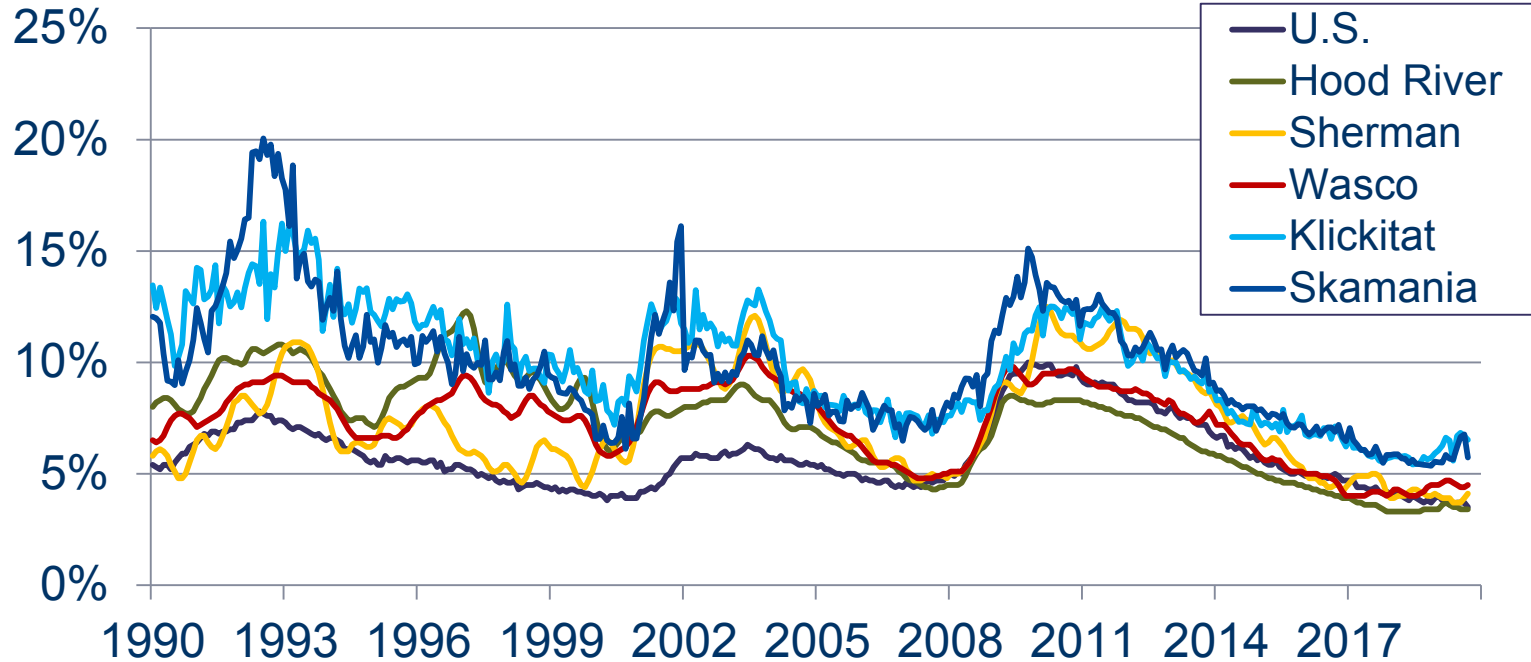
Seasonally-Adjusted



Source: BLS, Oregon Employment Department, Washington Employment Security Department/LMEA

Unemployment Rates

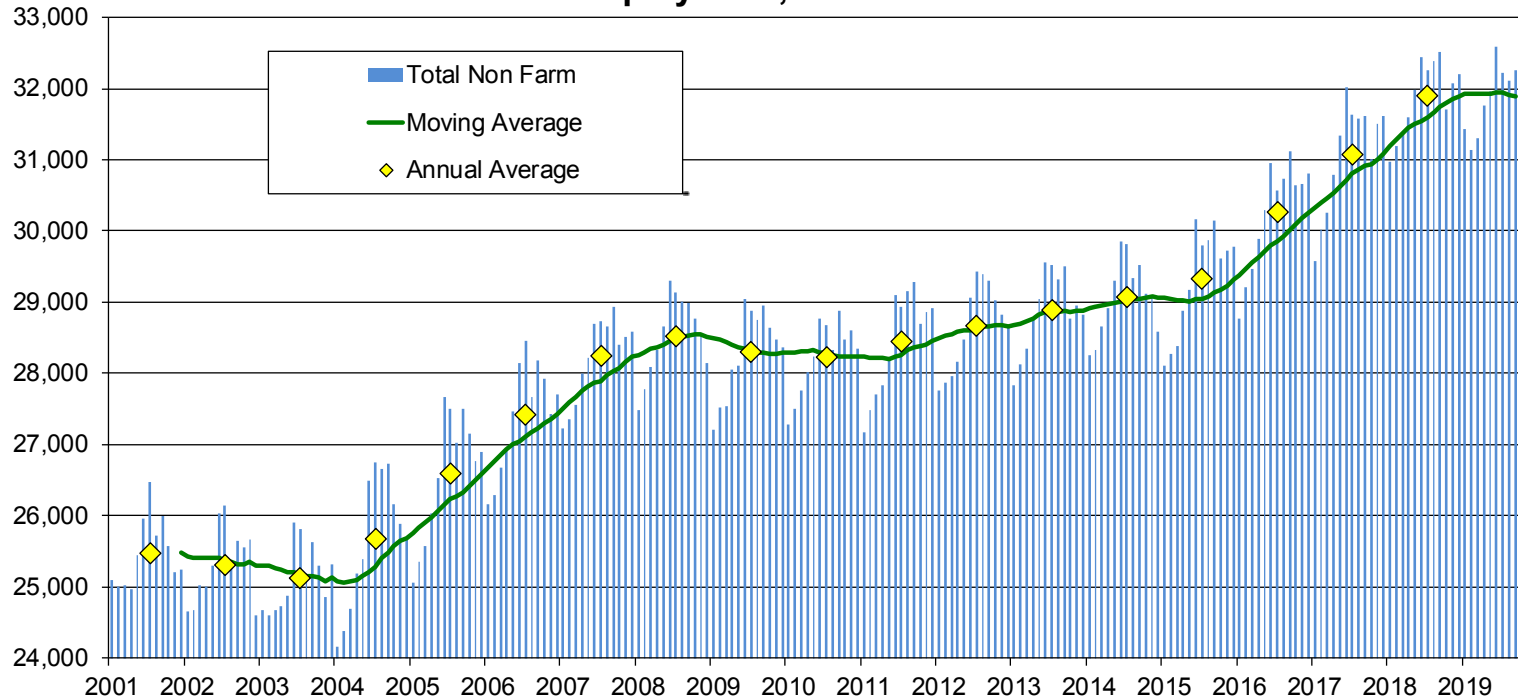
Seasonally-Adjusted



Source: BLS, Washington Employment Security Department/LMEA

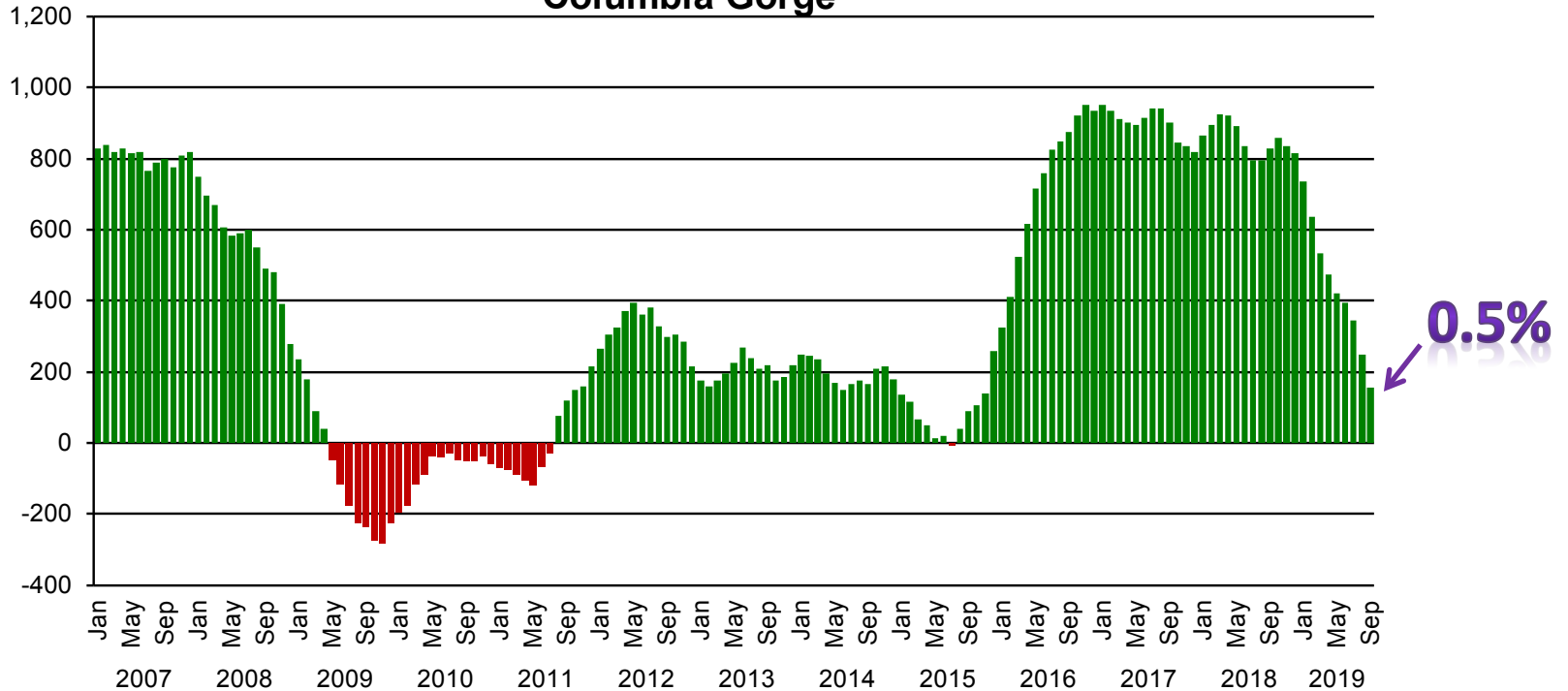
Annualized Growth at 0.5% September 2019

Columbia Gorge Total Non Farm Employment, 2001 - 2019

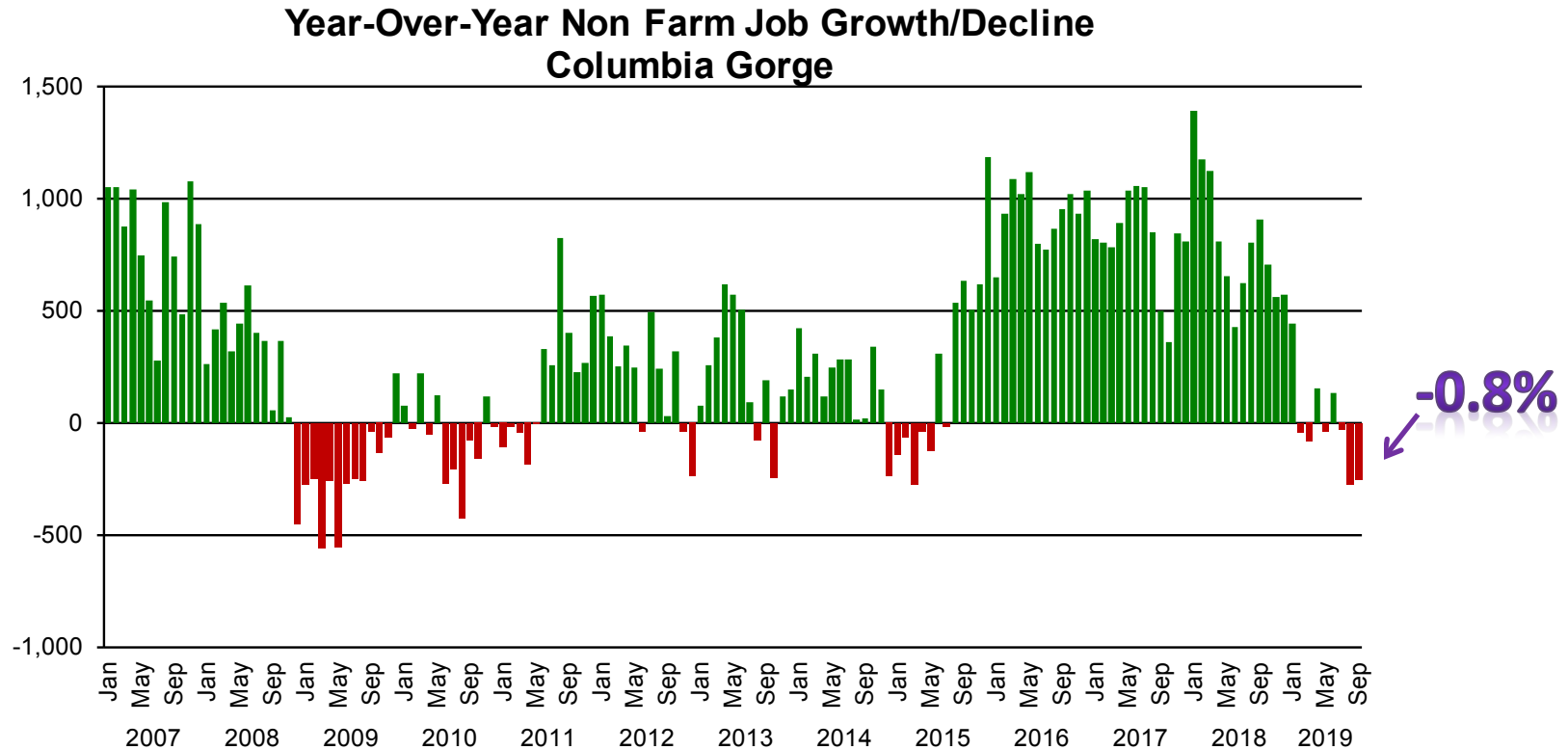


Annualized Job Gains/Loss

12-Month Moving Average Non Farm Job Growth/Decline Columbia Gorge

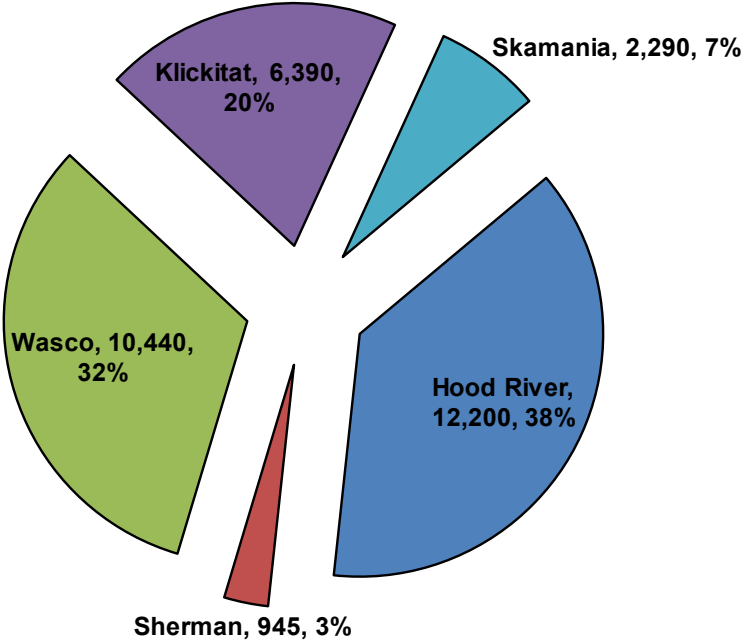


Recession & Recovery, OTY Job Gain/Loss



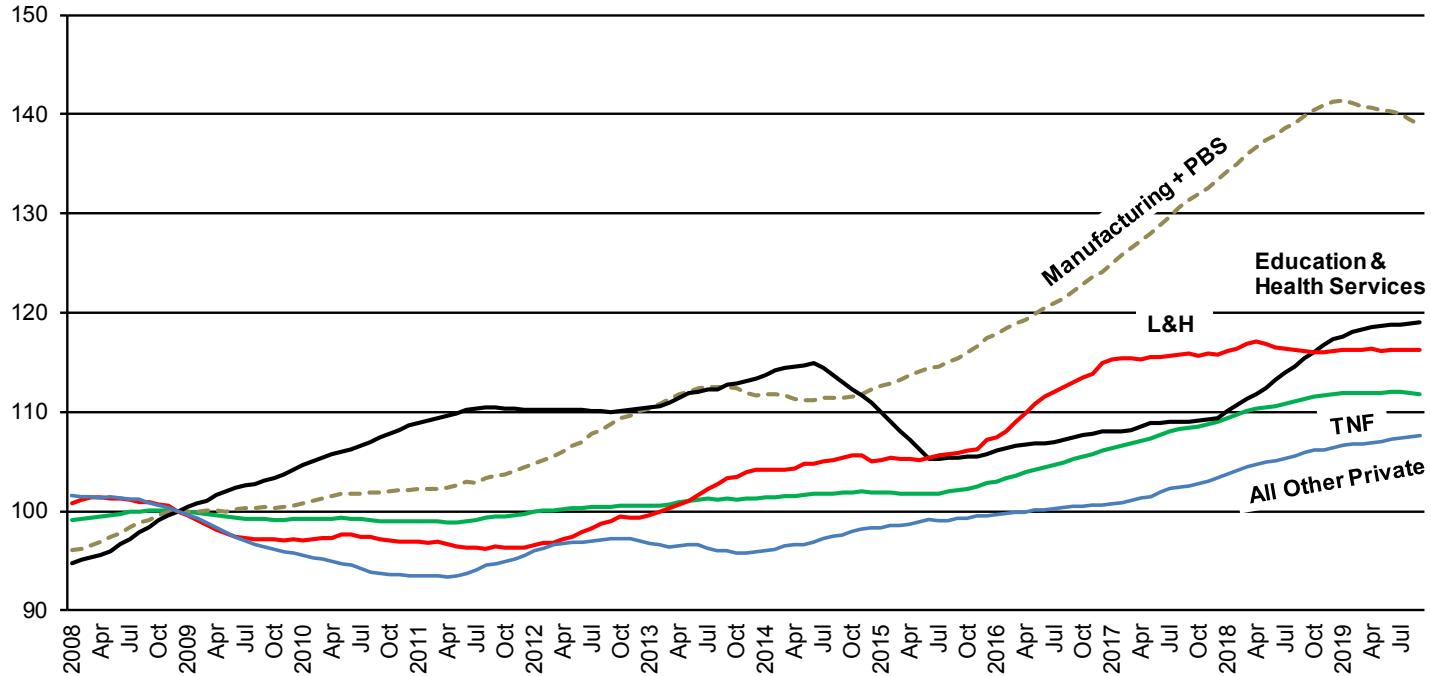
Columbia Gorge Employment = 32,265

Total Non Farm Employment September 2019



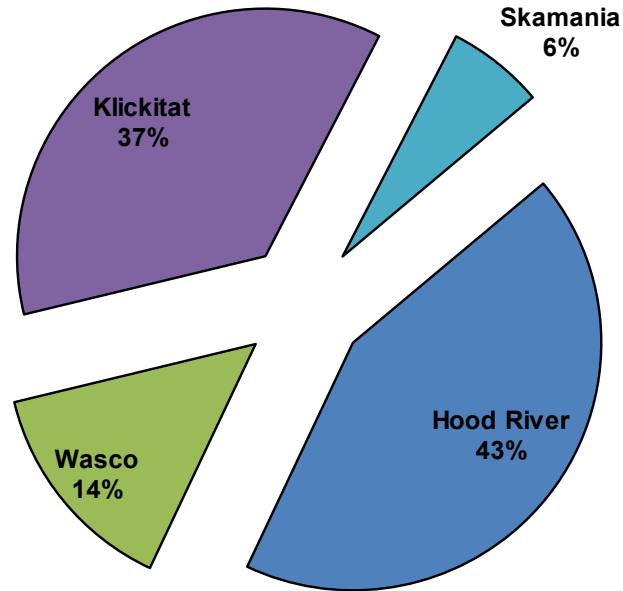
Leading Industries 2008-2018

Columbia Gorge Columbia Gorge High Growth Industries:
Indexed to 2008 Annual Average



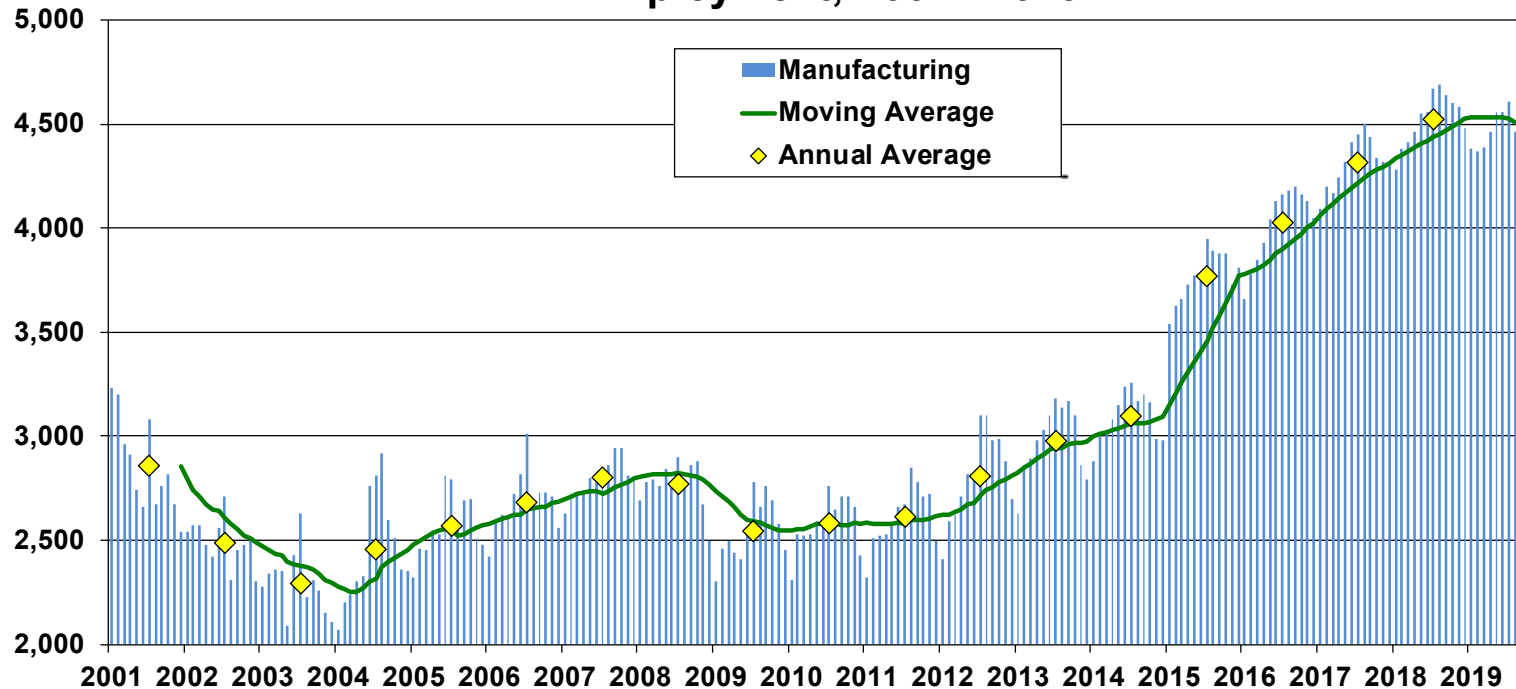
Manufacturing Employment = 4,430

Manufacturing Employment September 2019



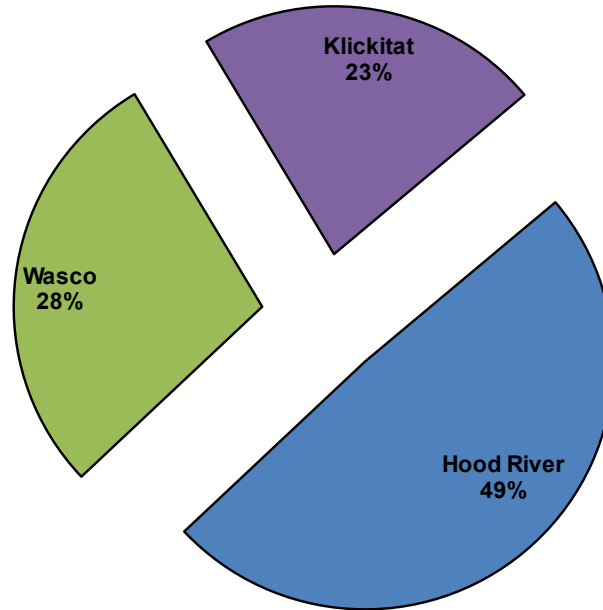
Manufacturing Levelled Off in 2019...

Columbia Gorge Manufacturing Industry Employment, 2001 - 2019



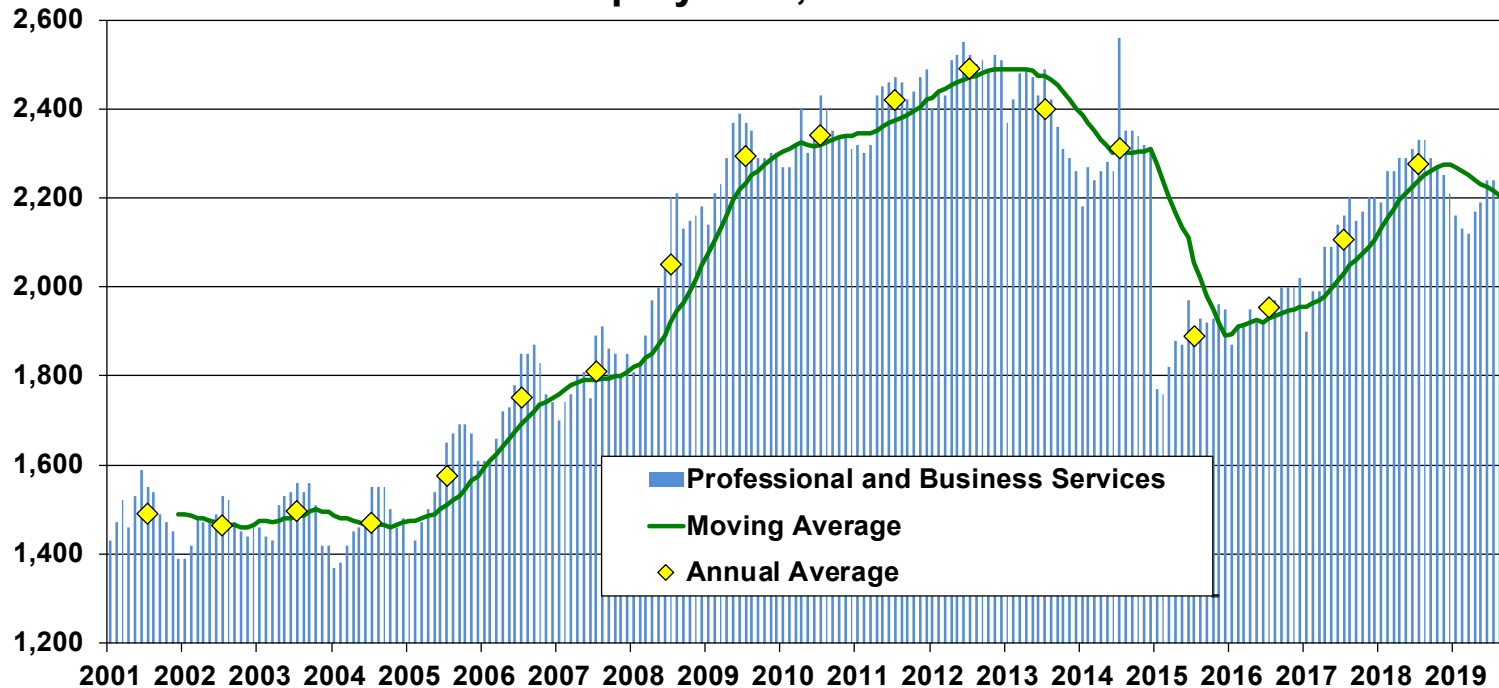
PBS Employment = 2,330

Professional and Business Services Employment September 2019



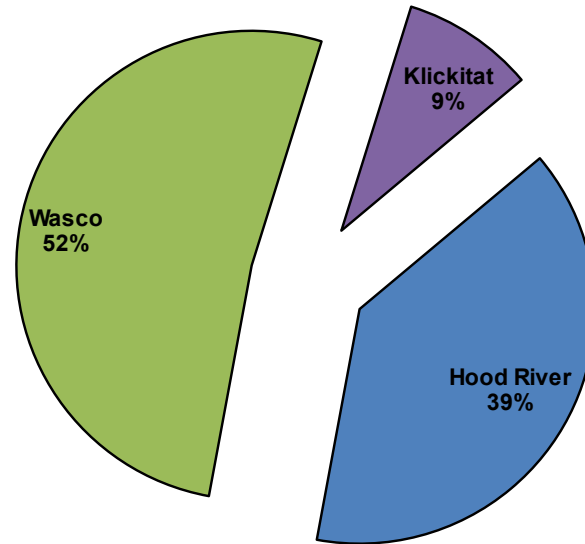
Professional & Business Services Cut Jobs in 2019

Columbia Gorge Professional and Business Services Employment, 2001 - 2019



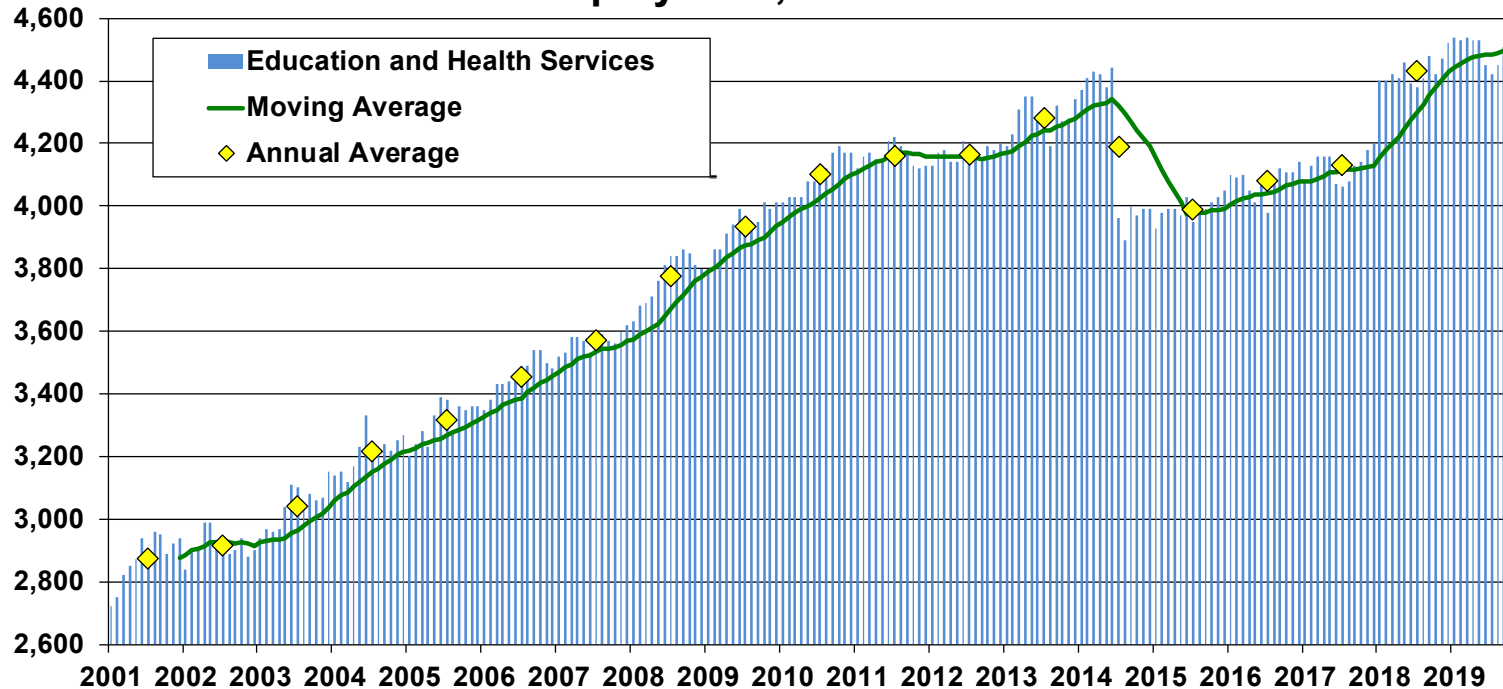
E & HS Employment = 4,380

Education and Health Services Employment
September 2019



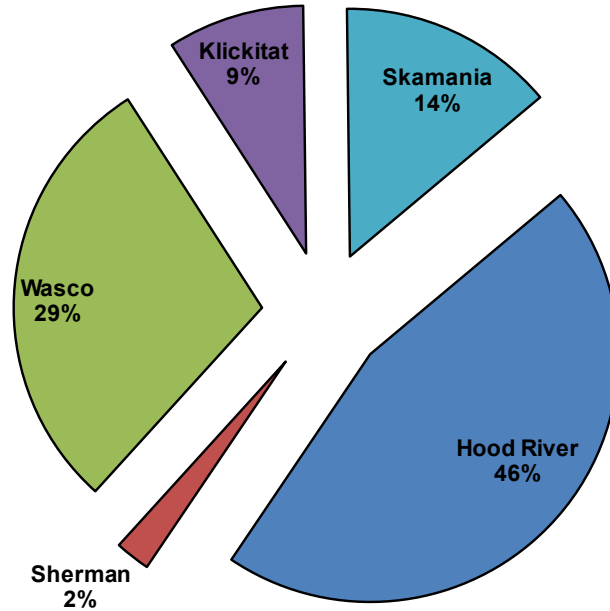
Education & Health Services

Columbia Gorge Education & Health Services Employment, 2001 - 2019



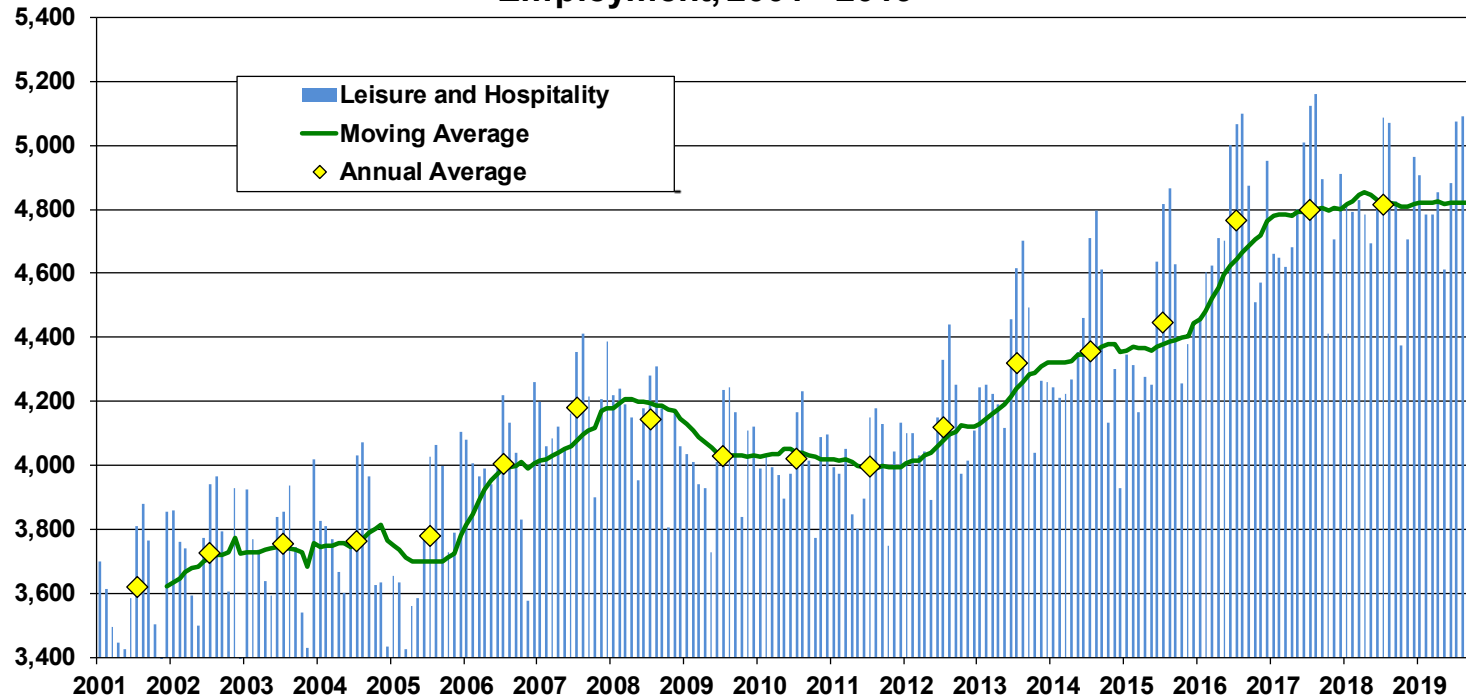
Leisure and Hospitality Employment = 4,830

Leisure and Hospitality Employment September 2019



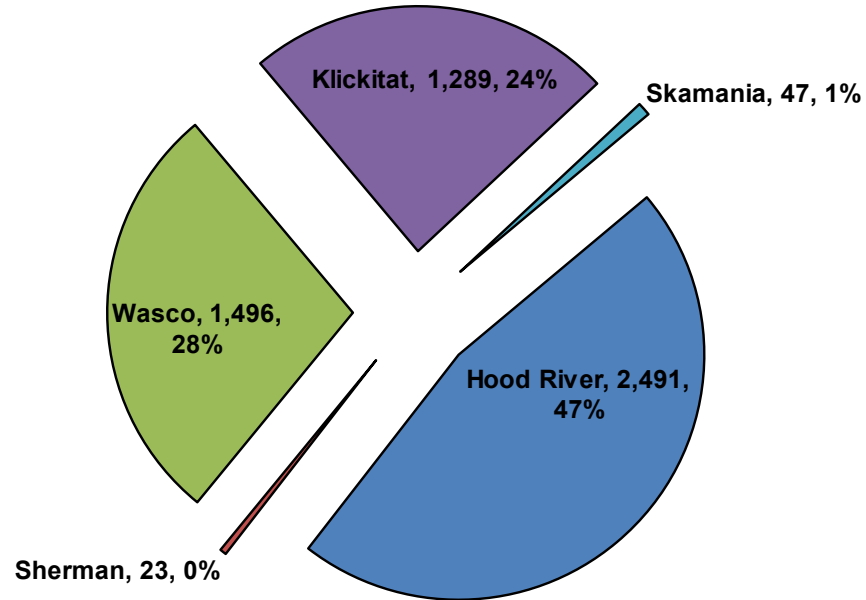
Leisure & Hospitality, Holding Steady

Columbia Gorge Leisure & Hospitality
Employment, 2001 - 2019



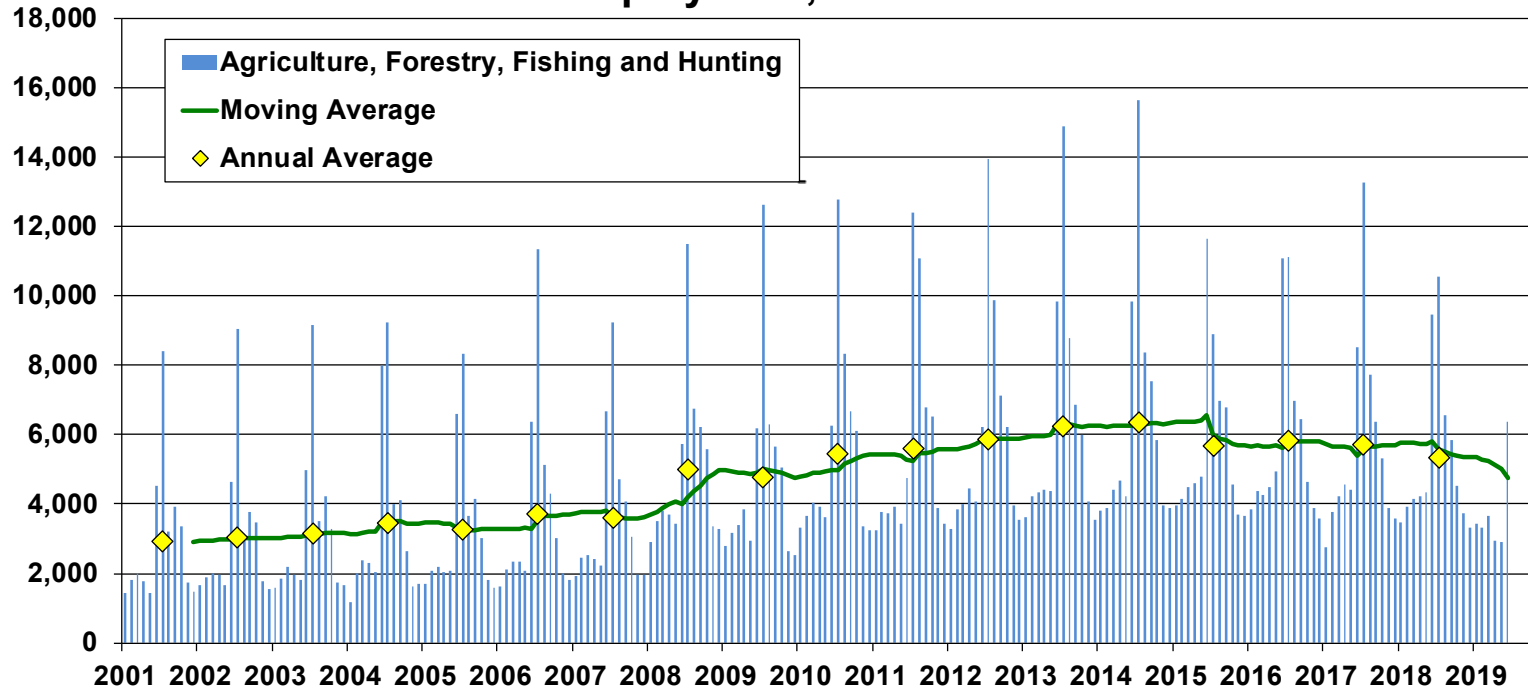
Agriculture, Forestry & Fishing = 5,680

Agriculture, Forestry & Fishing 2018 AA Employment



Agriculture, Forestry & Fishing: 5,350 Jobs in 2018

Columbia Gorge Agriculture, Forestry and Fishing Employment, 2001 - 2019



2017-2027 Forecast: 11% Growth

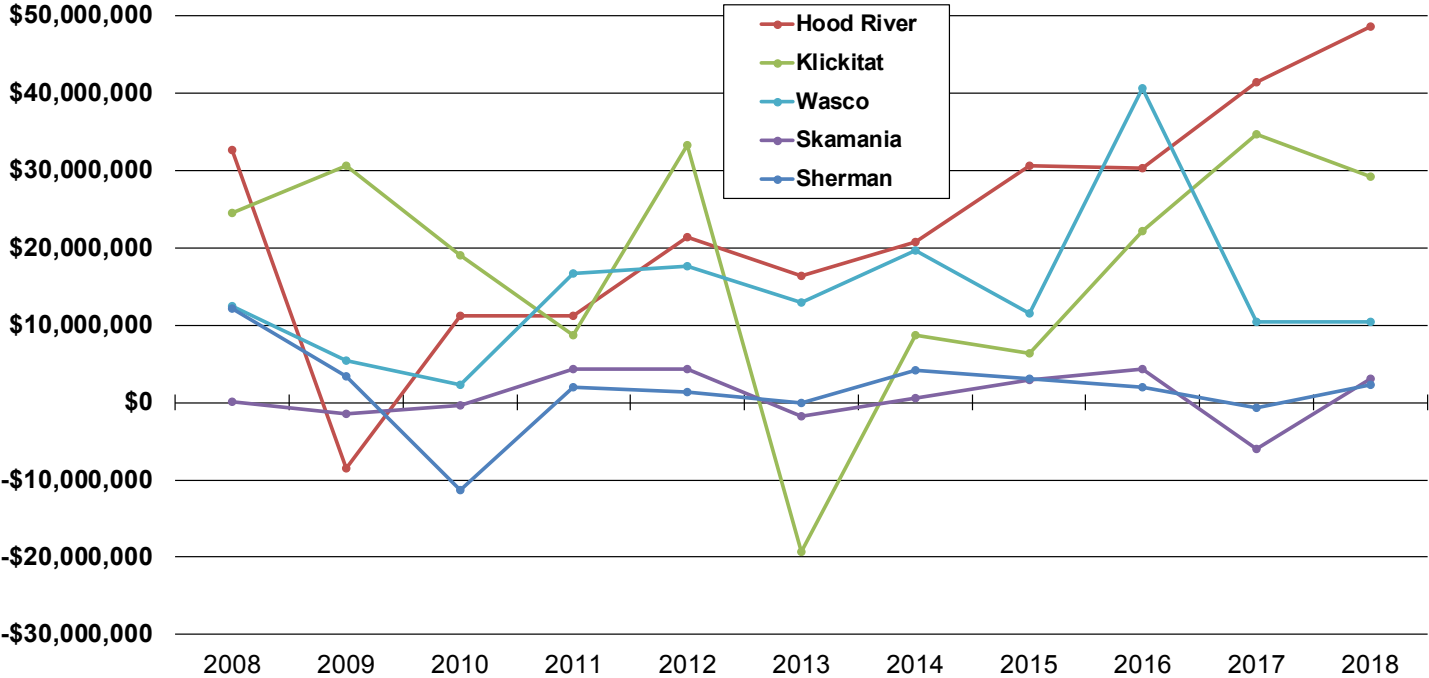
Industry Employment Forecast, 2017-2027 Gilliam, Hood River, Sherman, Wasco, and Wheeler Counties

	2017	2027	Change	% Change
Total Employment	31,060	34,400	3,340	11%
Natural resources and mining	4,520	4,790	270	6%
Manufacturing	2,500	2,800	300	12%
Professional and business services	1,820	2,120	300	16%
Health care and social assistance	3,890	4,530	640	16%
Leisure and hospitality	3,890	4,410	520	13%
Government	4,120	4,300	180	4%
Self-employment	2,850	3,250	400	14%



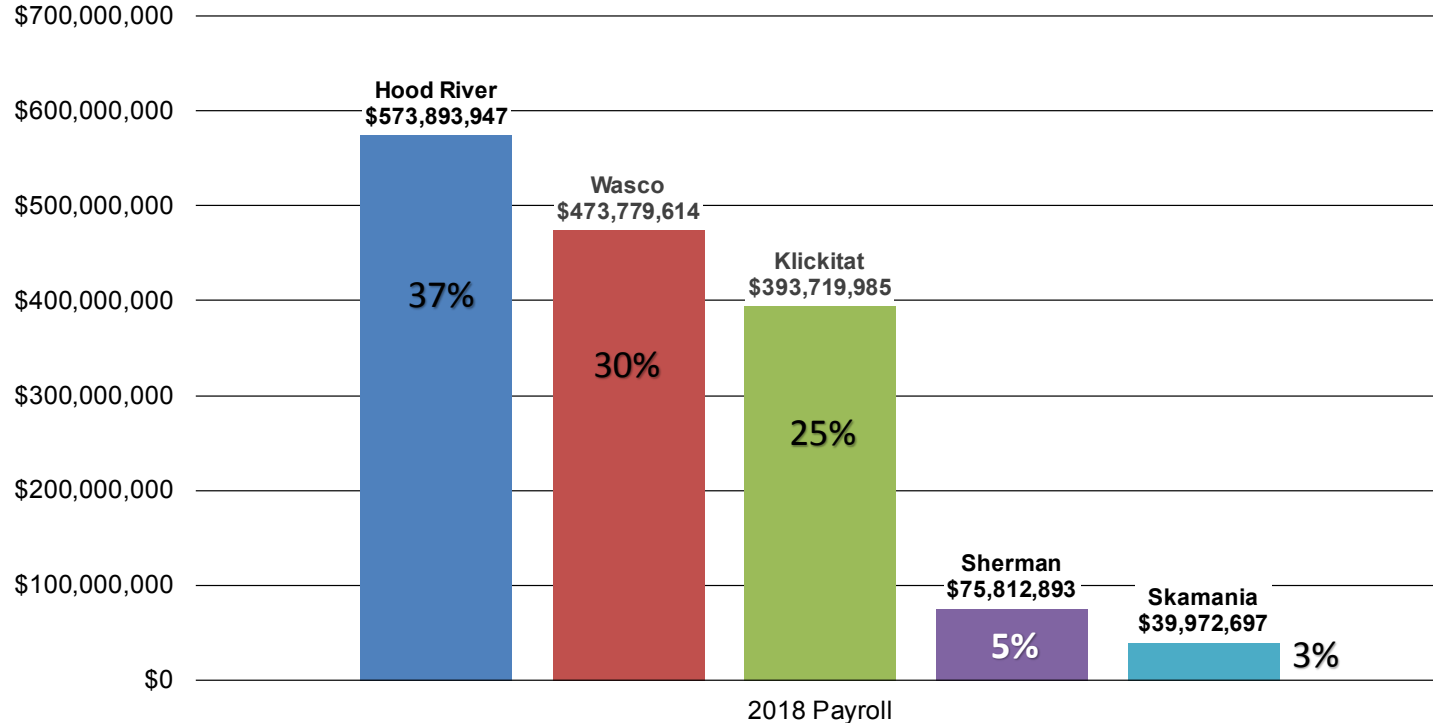
Total Payroll Growth by Year & County

Total All Industries Payroll Growth by Year

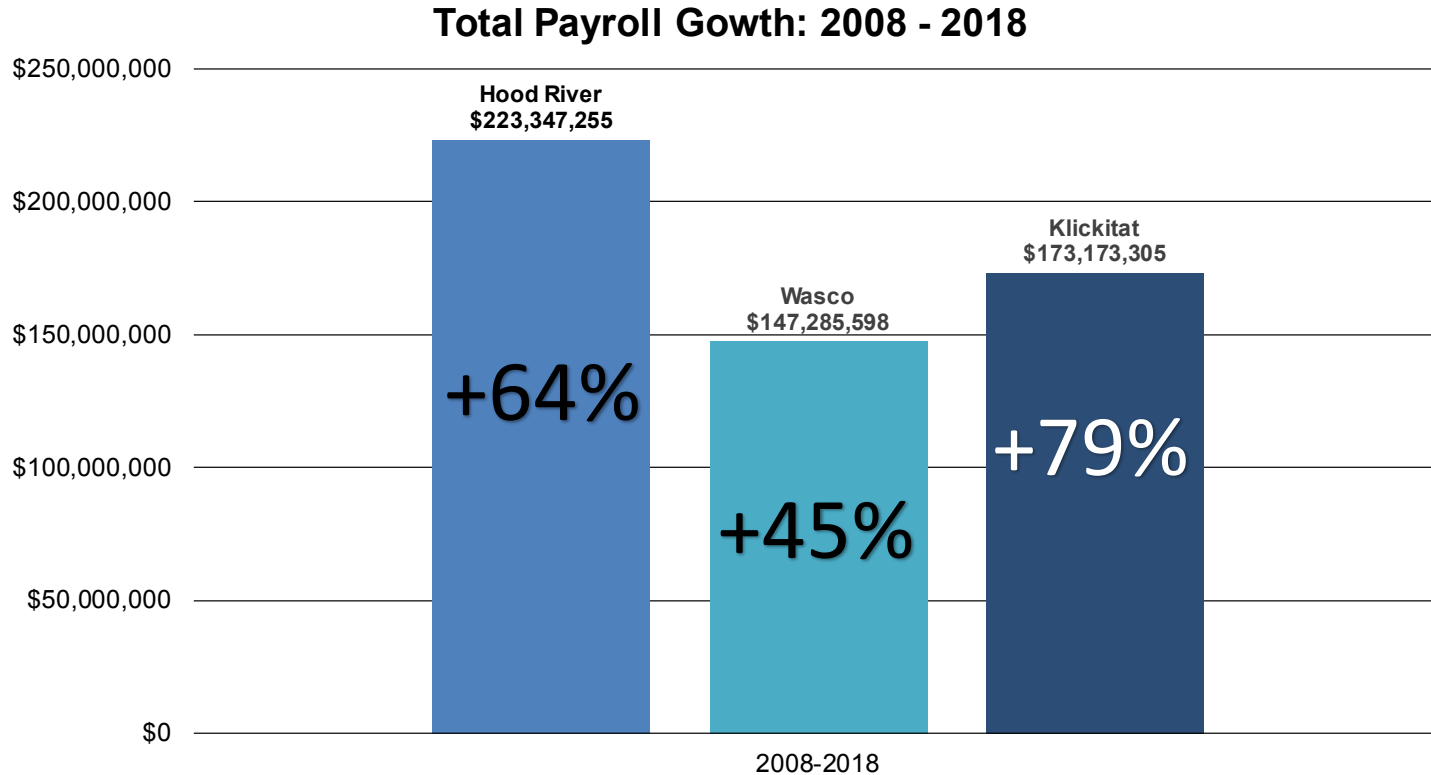


Total All Industries Payroll = \$1.6 Billion

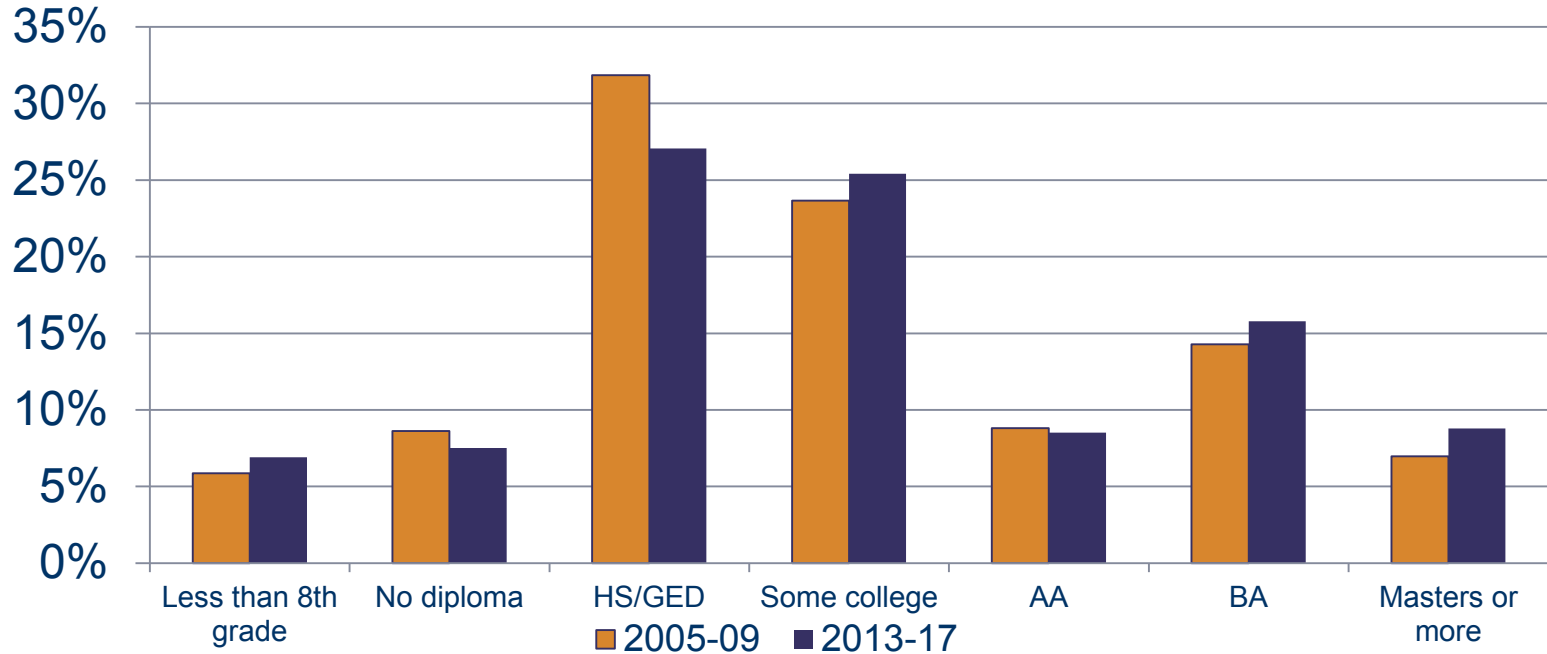
Total Payroll by County, 2018



Total Payroll Growth 2008-2018

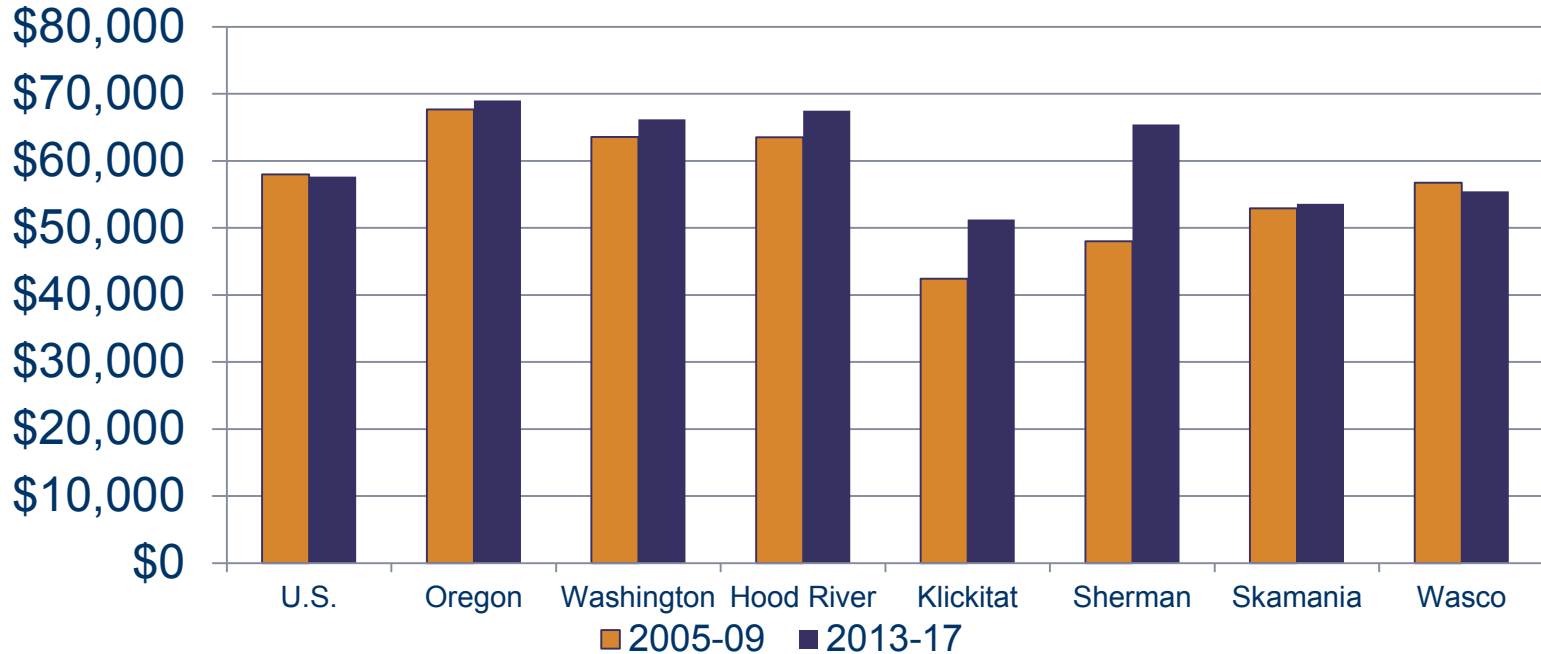


Formal Educational Attainment Generally Increasing



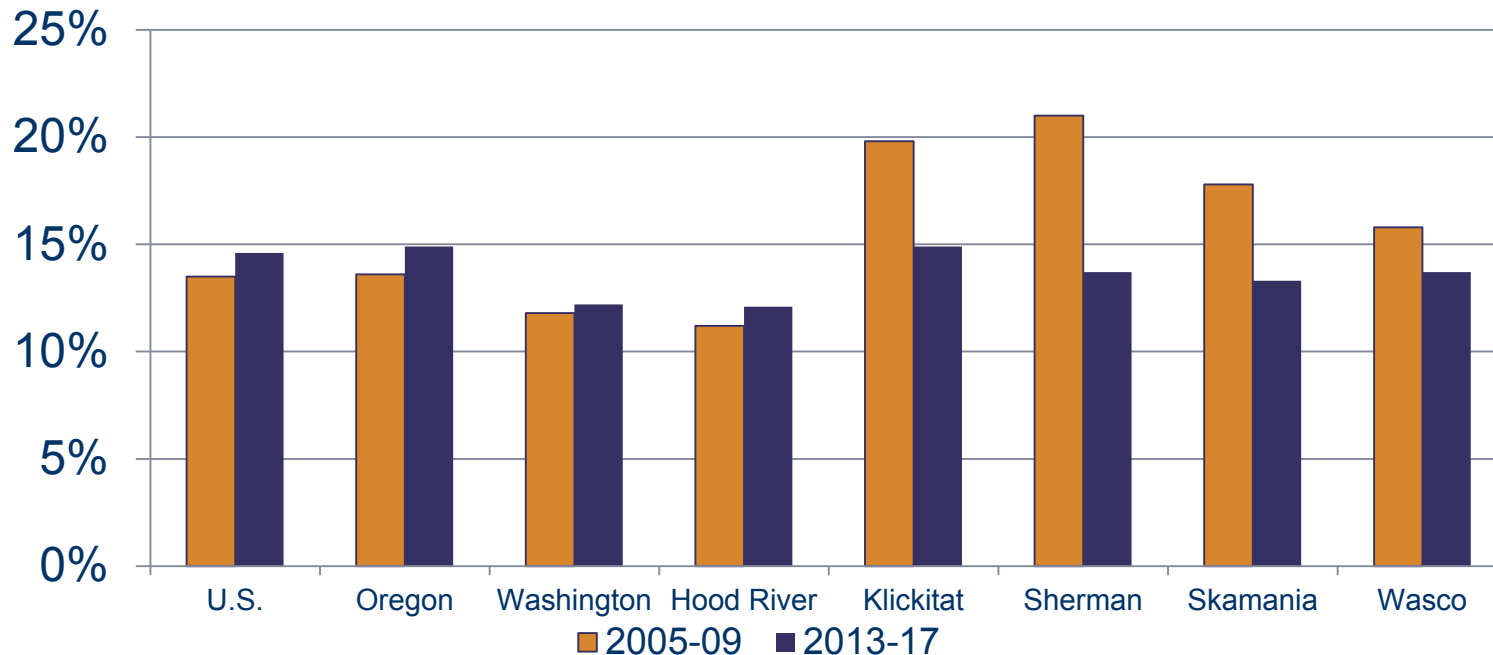
Source: Census Bureau/American Community Survey

Median Household Income: Up in Three Counties, Flat in Two



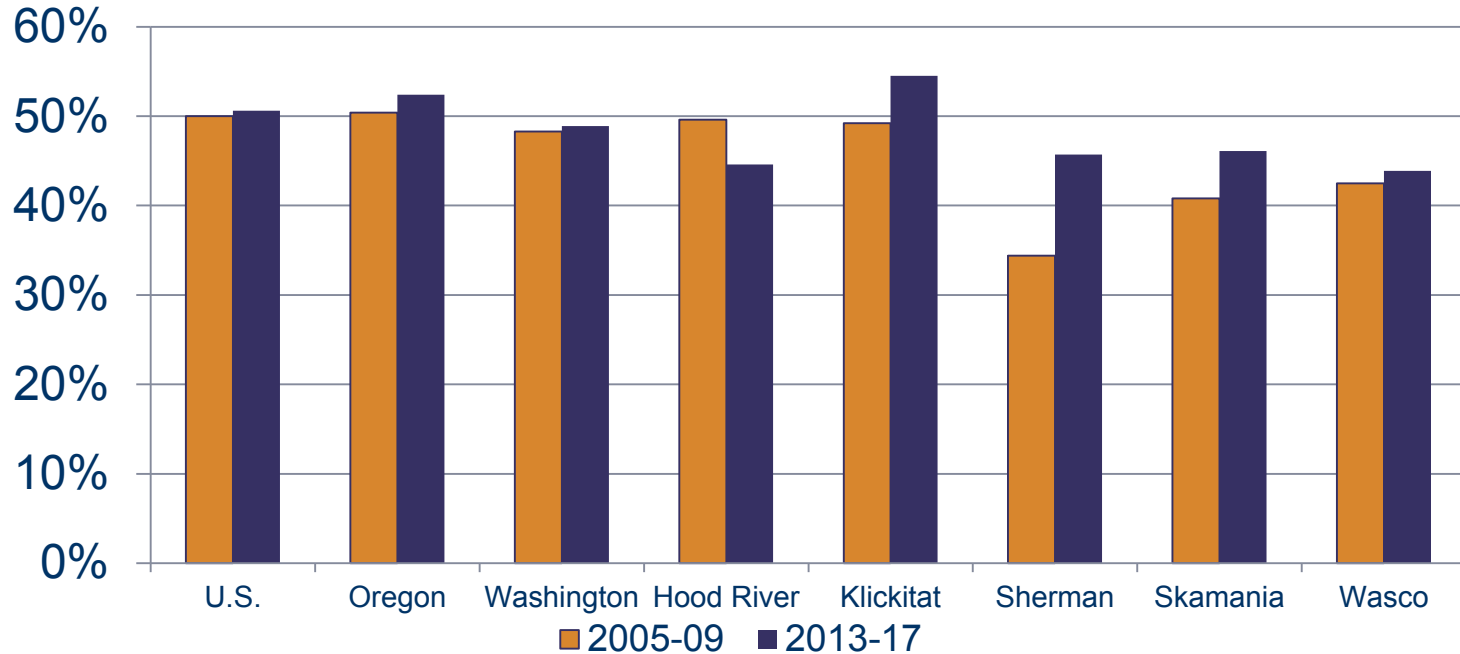
Source: Census Bureau/American Community Survey

Poverty Rate: Down in Four Counties, Flat in One



Source: Census Bureau/American Community Survey

Cost-Burdened Renters: More in Four Counties, Fewer in One



Source: Census Bureau/American Community Survey

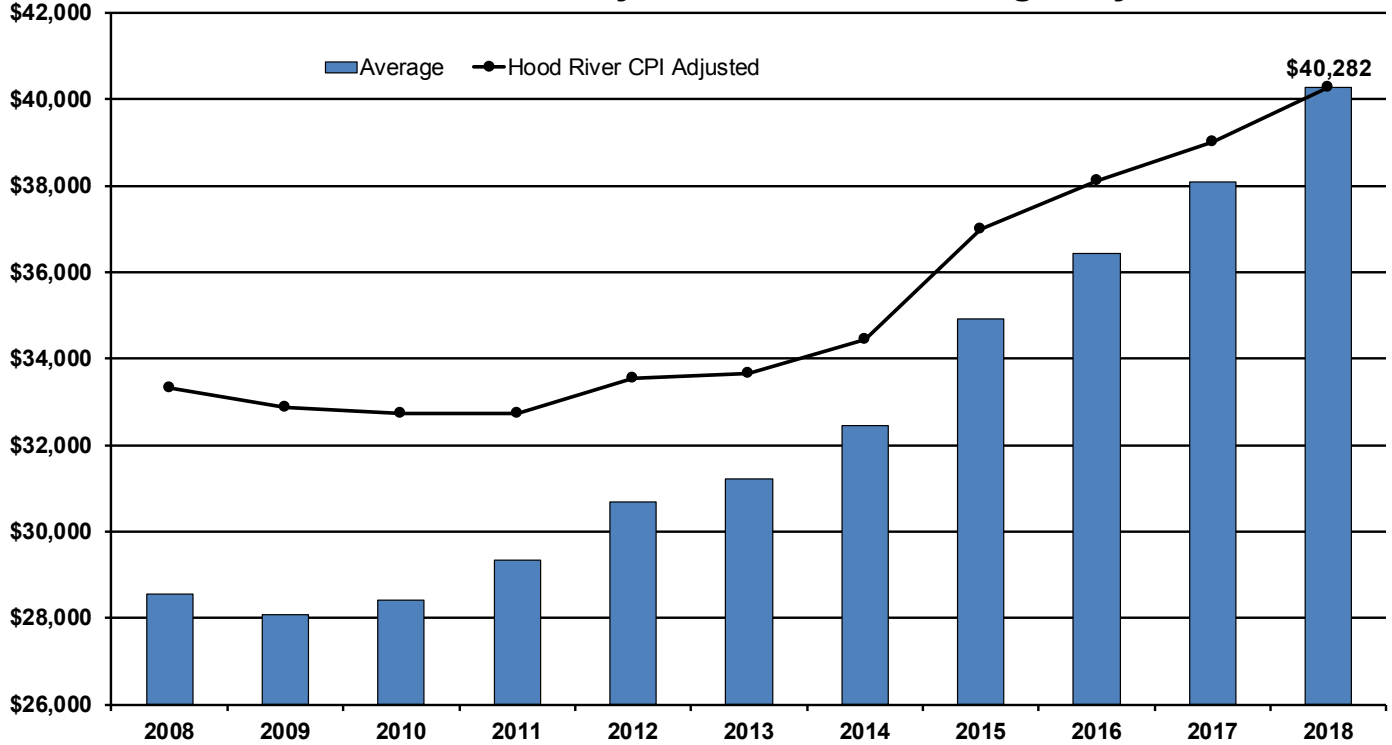
Payroll, Wages and Job Growth 2008-2018

HOOD RIVER, SHERMAN & WASCO



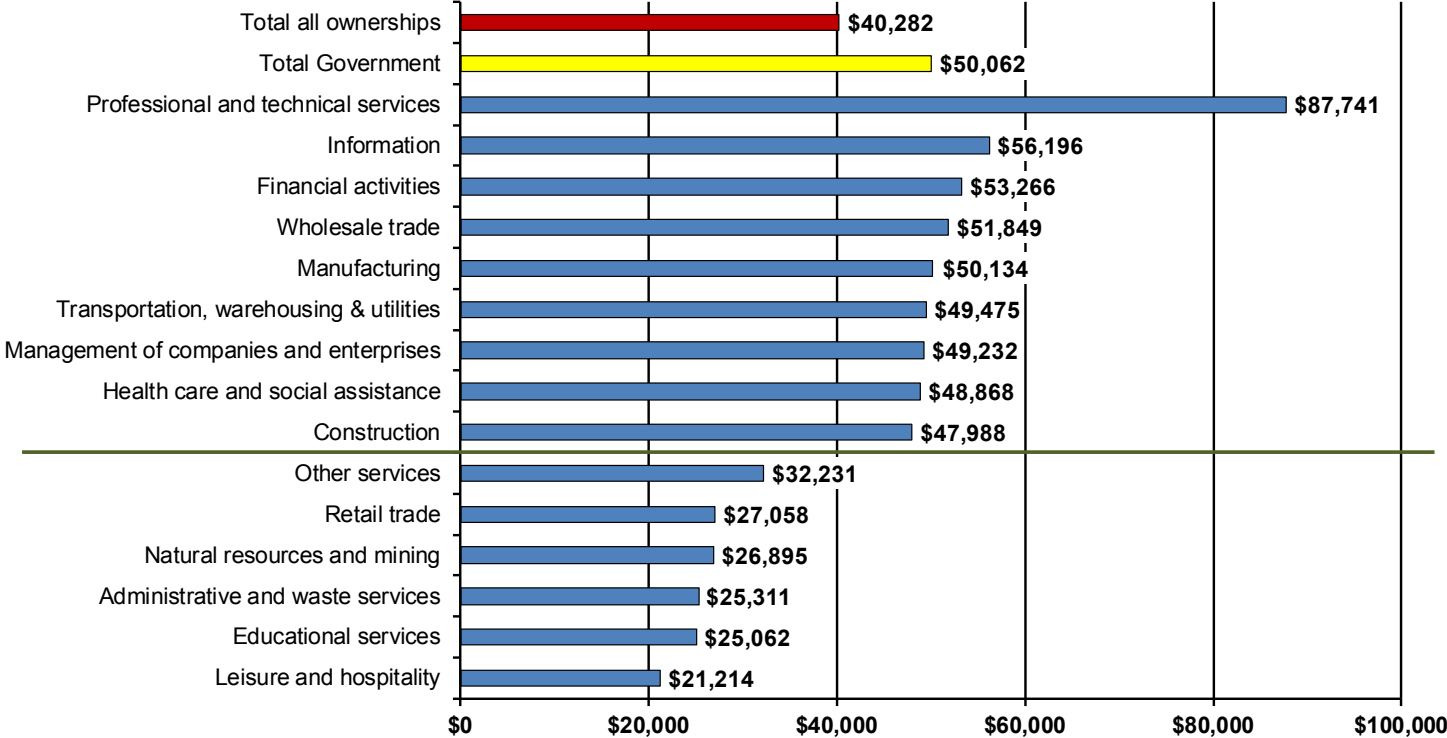
Hood River County Average Pay by Year

Hood River County All Industries Average Pay

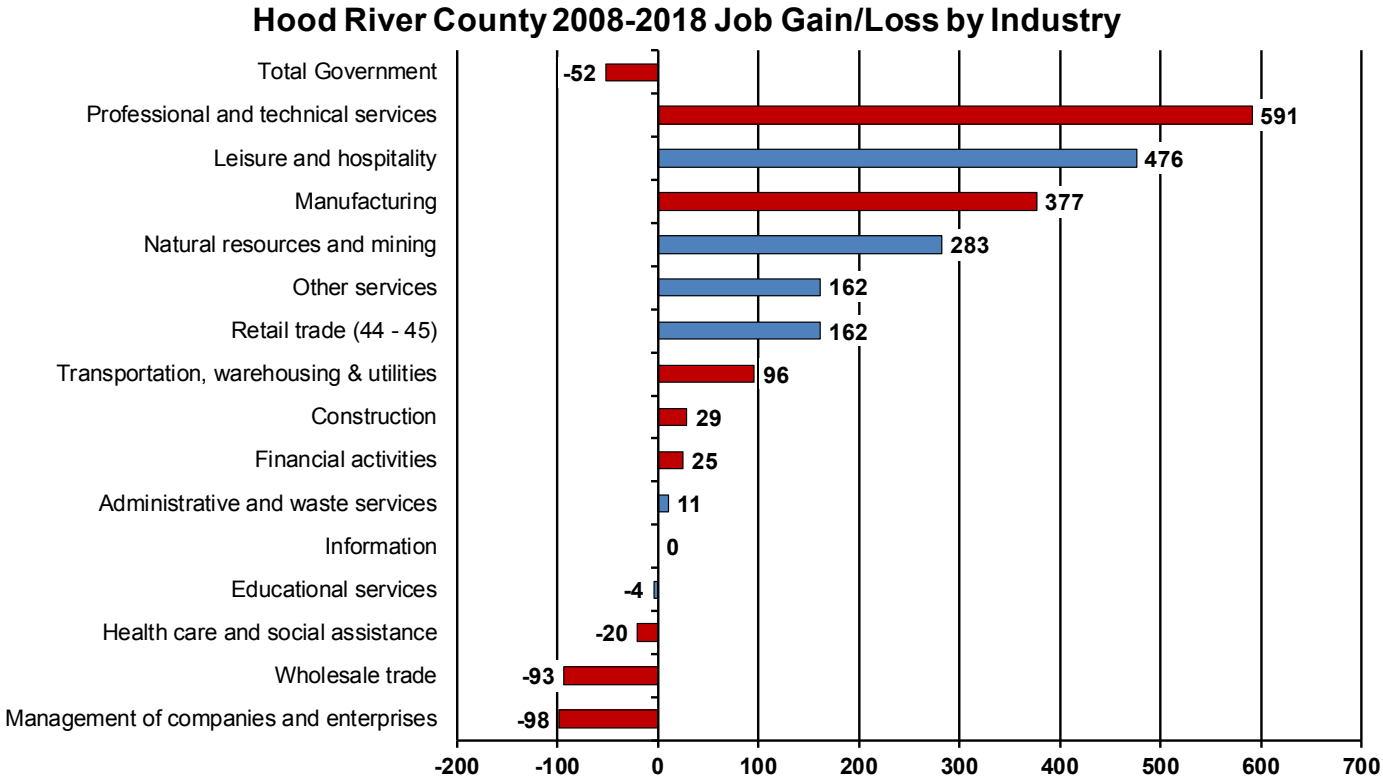


2018 Hood River County Pay by Industry

Hood River County 2018 Average Wage by Industry

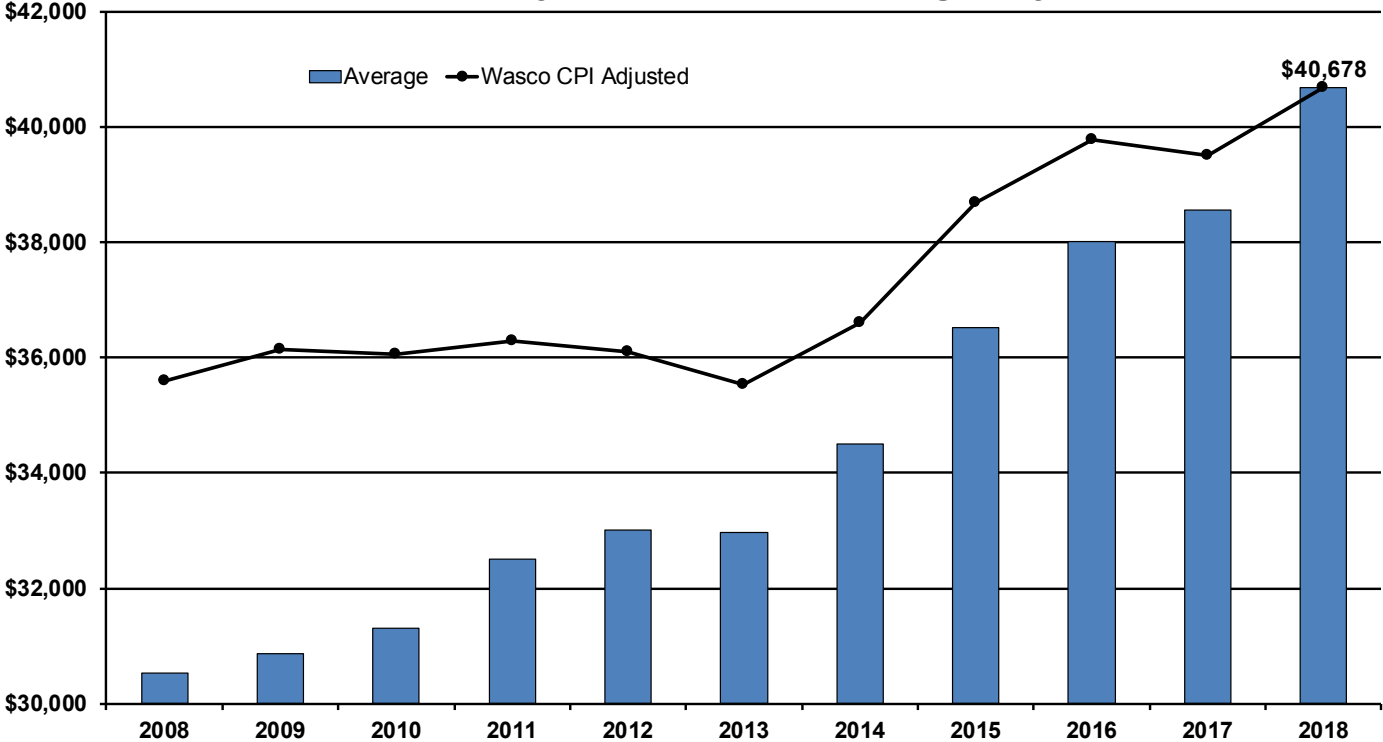


Hood River County 2008-2018 Job Gains/Losses



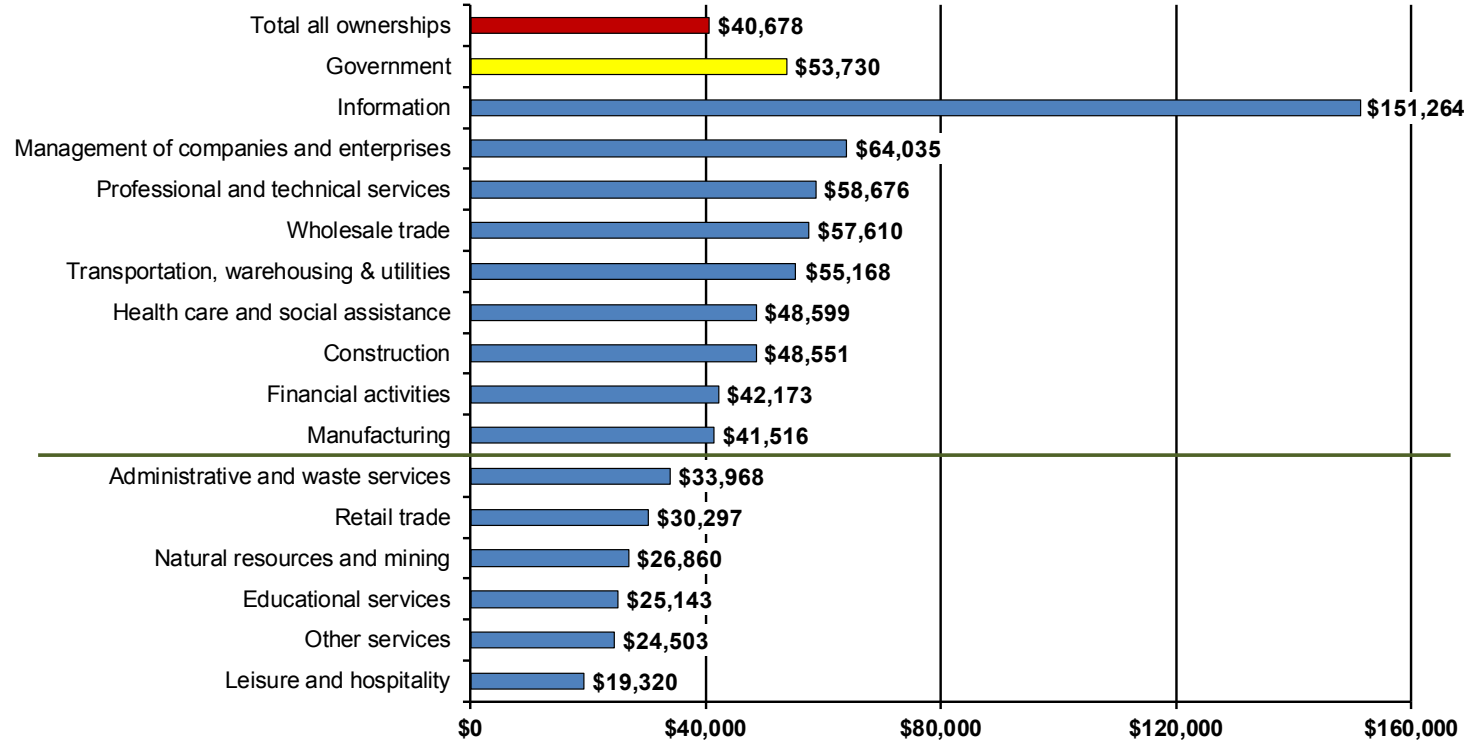
Wasco County Pay by Industry

Wasco County All Industries Average Pay



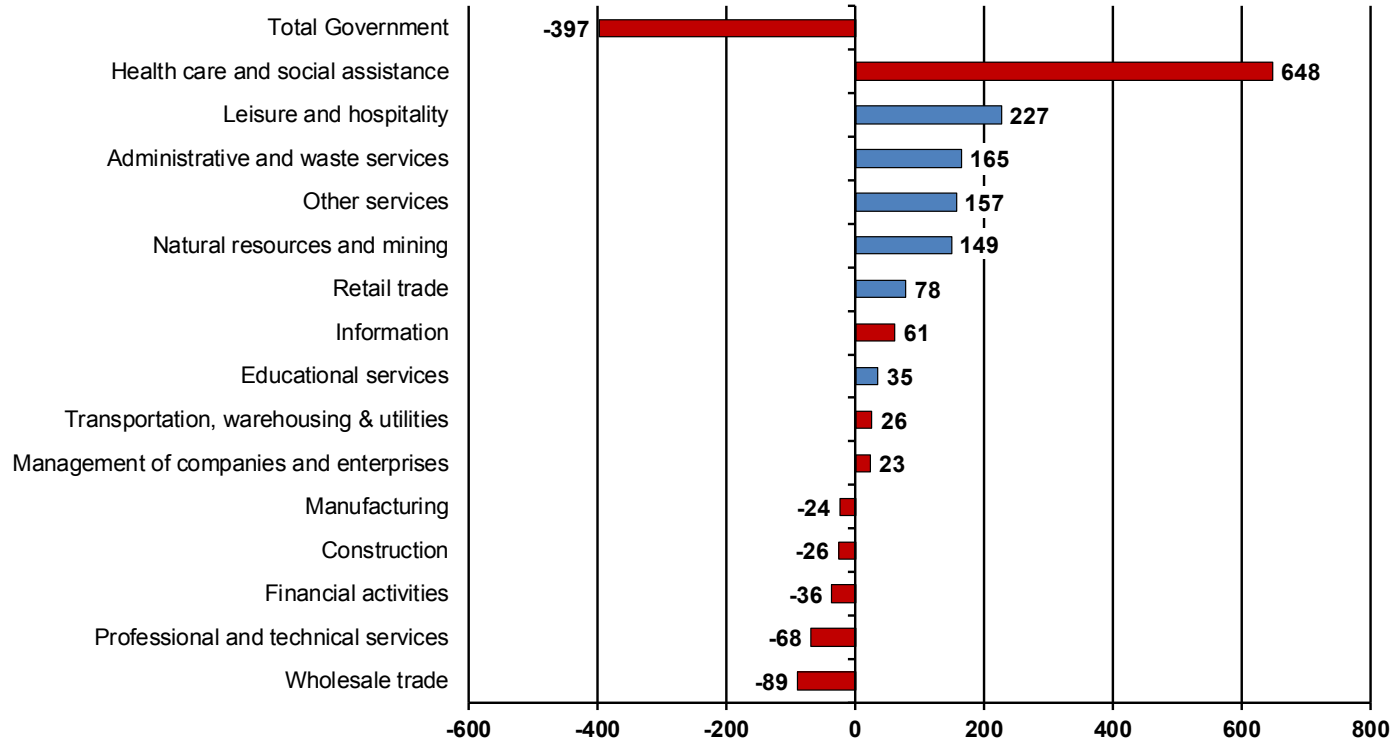
2018 Wasco County Pay by Industry

Wasco County 2018 Average Wage by Industry



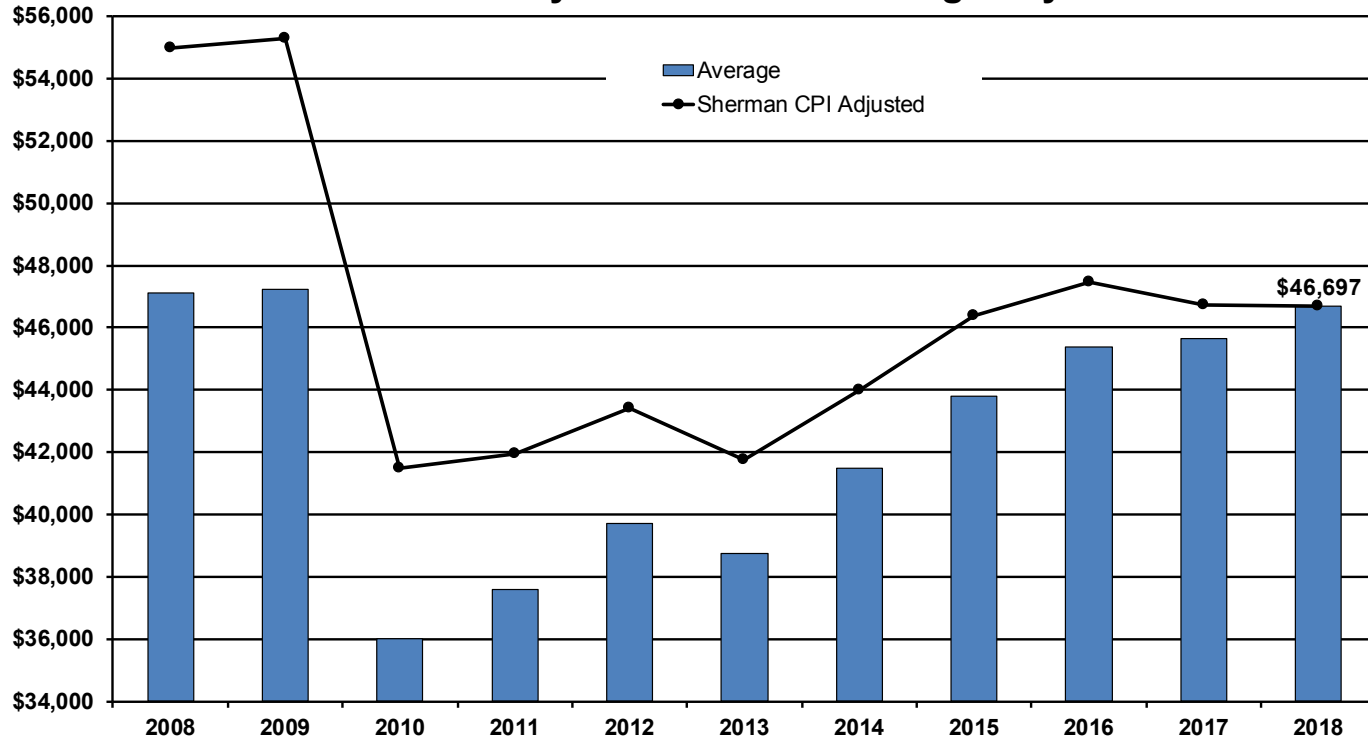
Wasco County 2008-2018 Job Gains/Losses

Wasco County 2008-2018 Job Gain/Loss by Industry



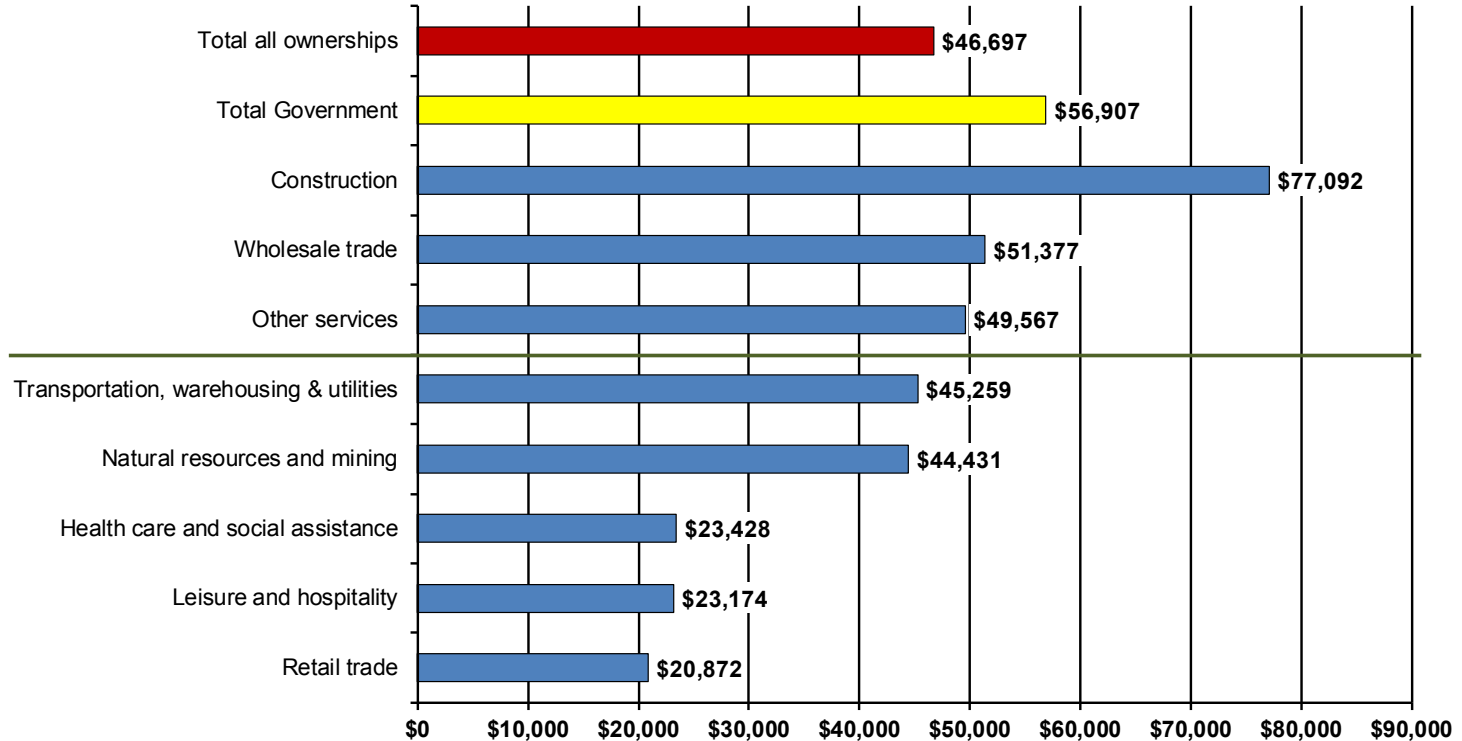
Sherman County Pay by Industry

Sherman County All Industries Average Pay



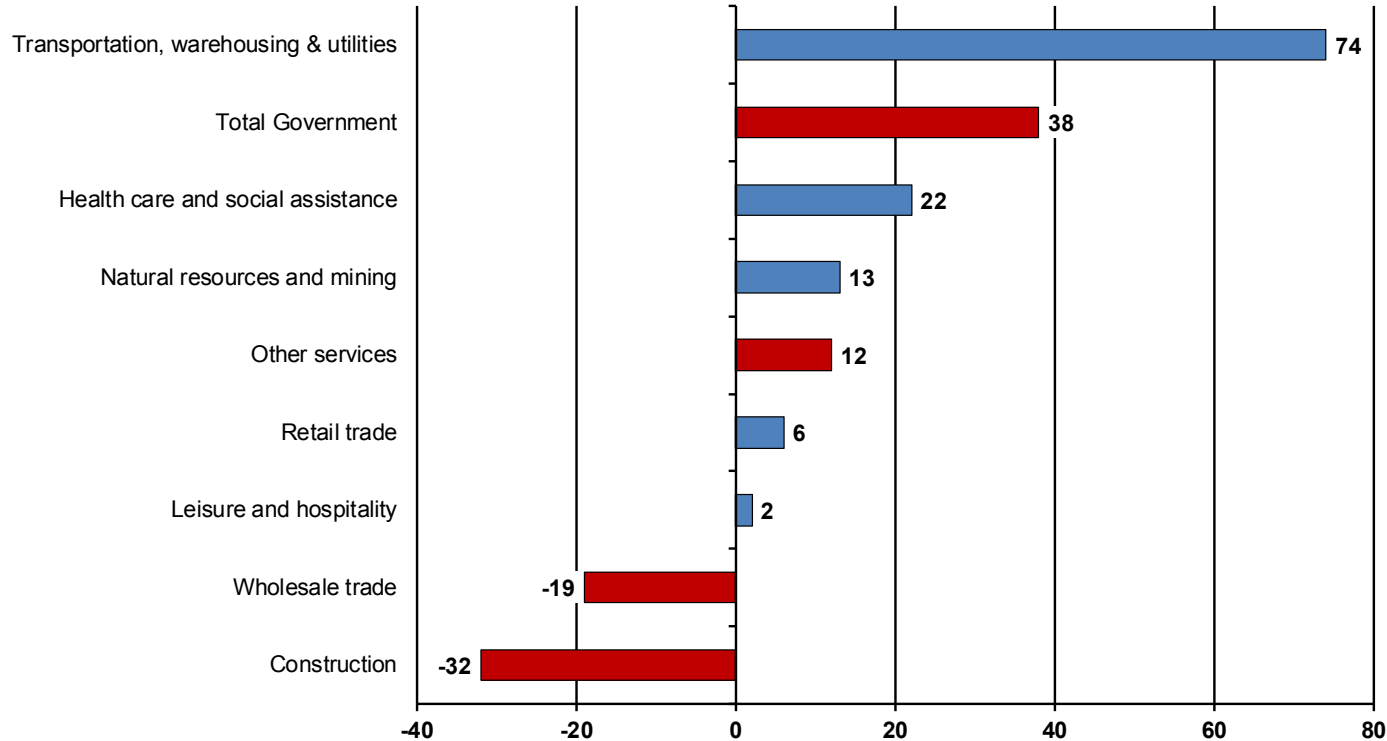
2018 Sherman County Pay by Industry

Sherman County 2018 Average Wage by Industry



Sherman County 2008-2018 Job Gains/Losses

Sherman County 2008-2018 Job Gain/Loss by Industry

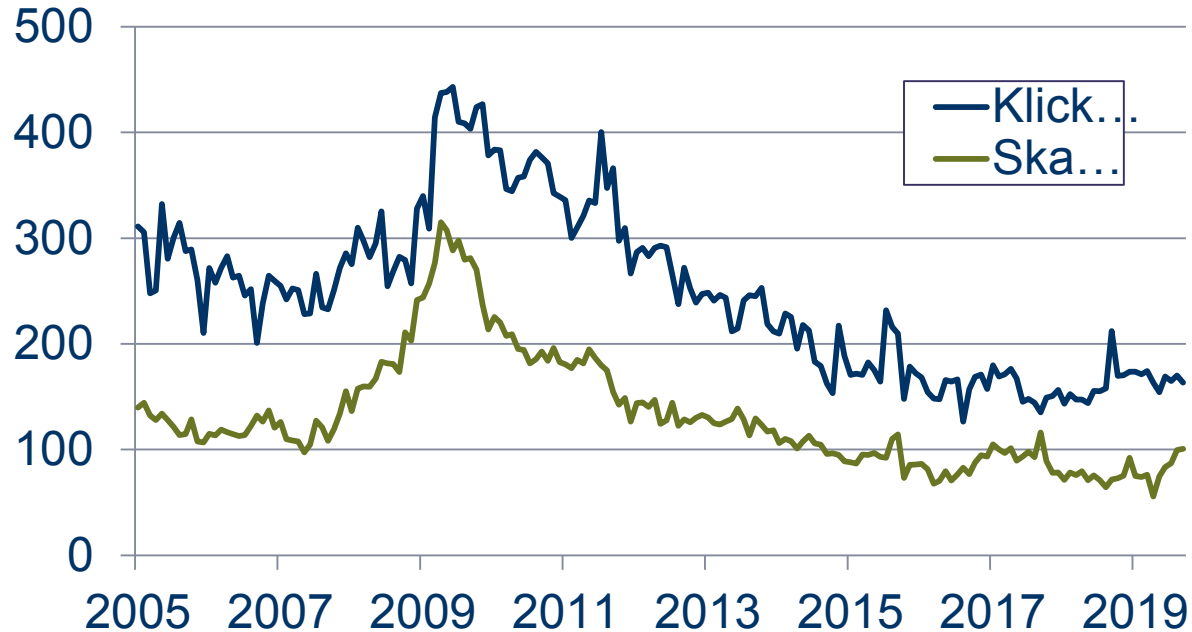


Employment and wage trends

KLICKITAT & SKAMANIA

Claims Still at Low Levels

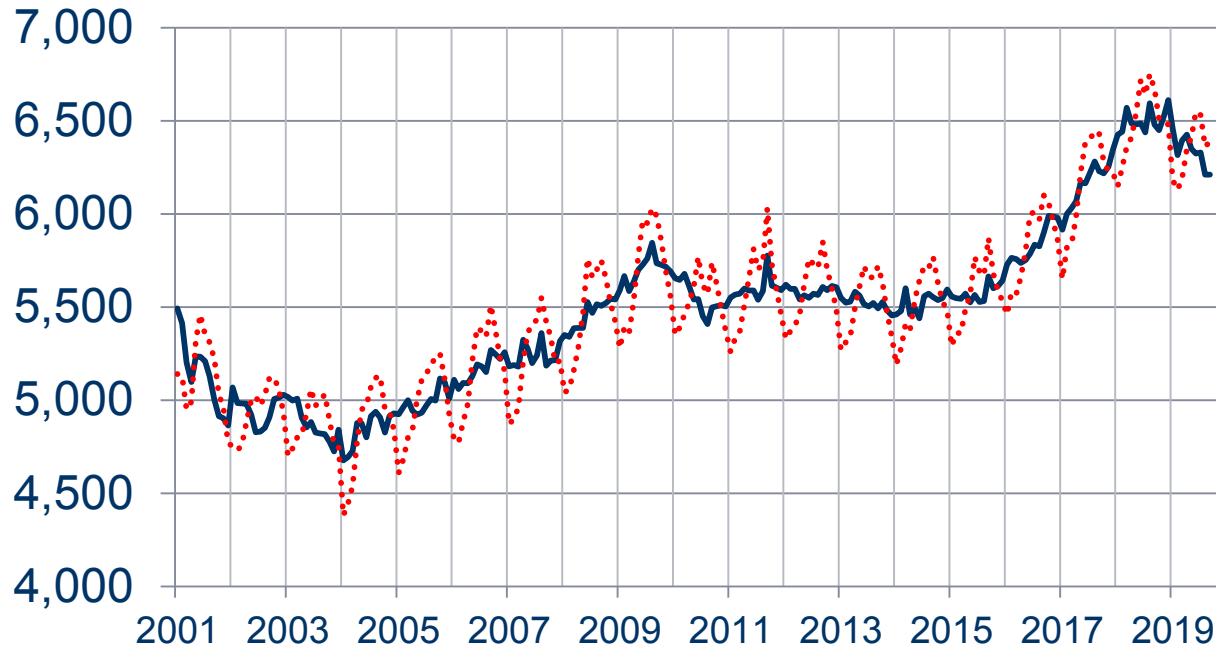
Continued Unemployment Claims, Seasonally Adjusted



Source: Washington Employment Security Department/LMPA

Klickitat Nonfarm Jobs

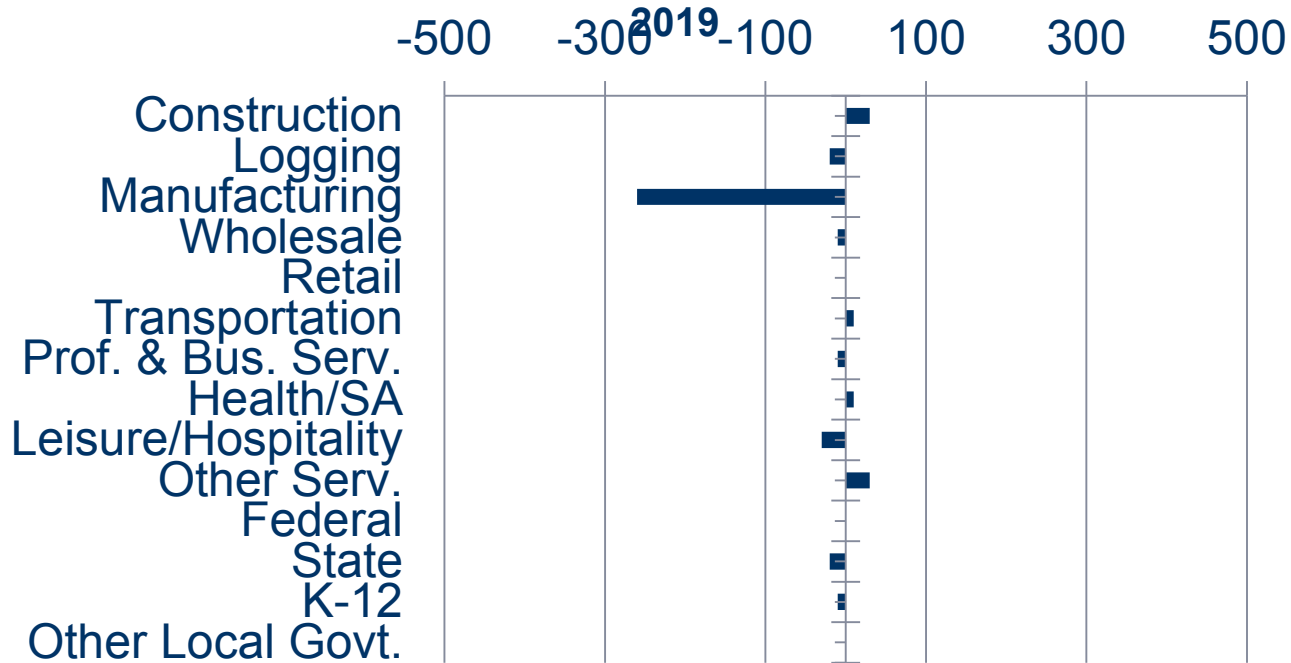
Seasonally-Adjusted Nonfarm Employment



Source: Washington Employment Security Department/LMEA

Klickitat in the Past Year

Employment Change, Klickitat County, Sep. 2018 to Sep. 2019

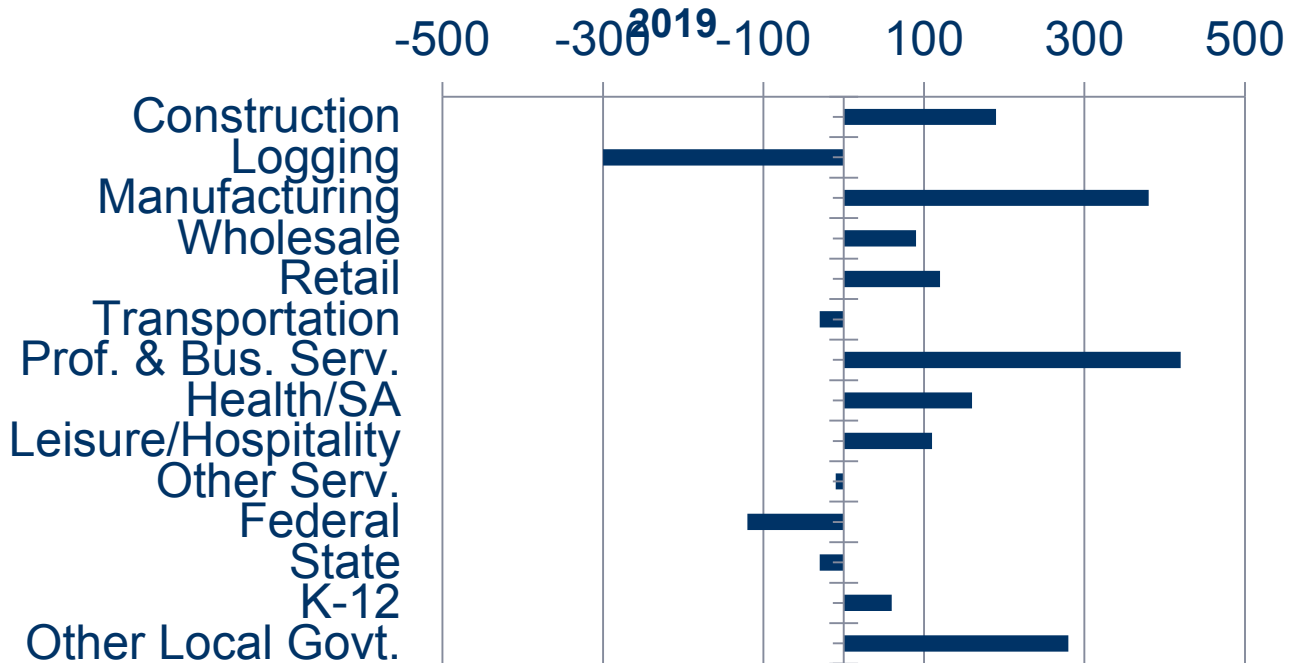


Source: Washington Employment Security Department/LMEA

Klickitat in the Past 29 Years

+1,320 Jobs/26 percent

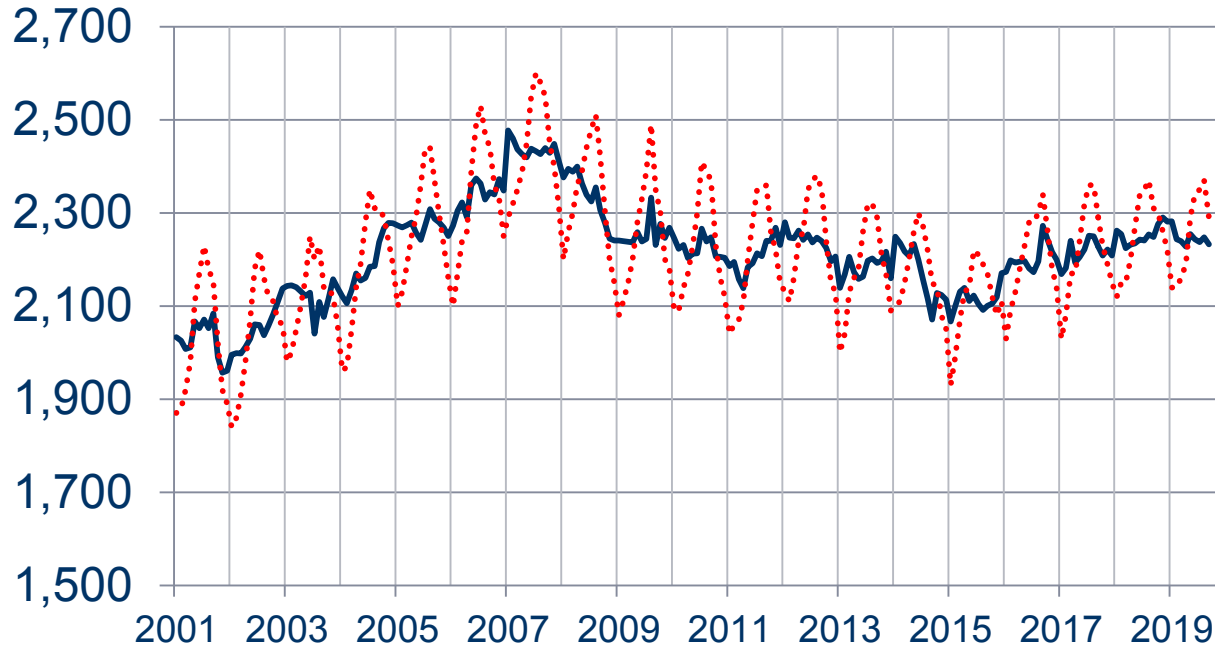
Employment Change, Klickitat County, Sep. 1990 to Sep. 2019



Source: Washington Employment Security Department/LMEA

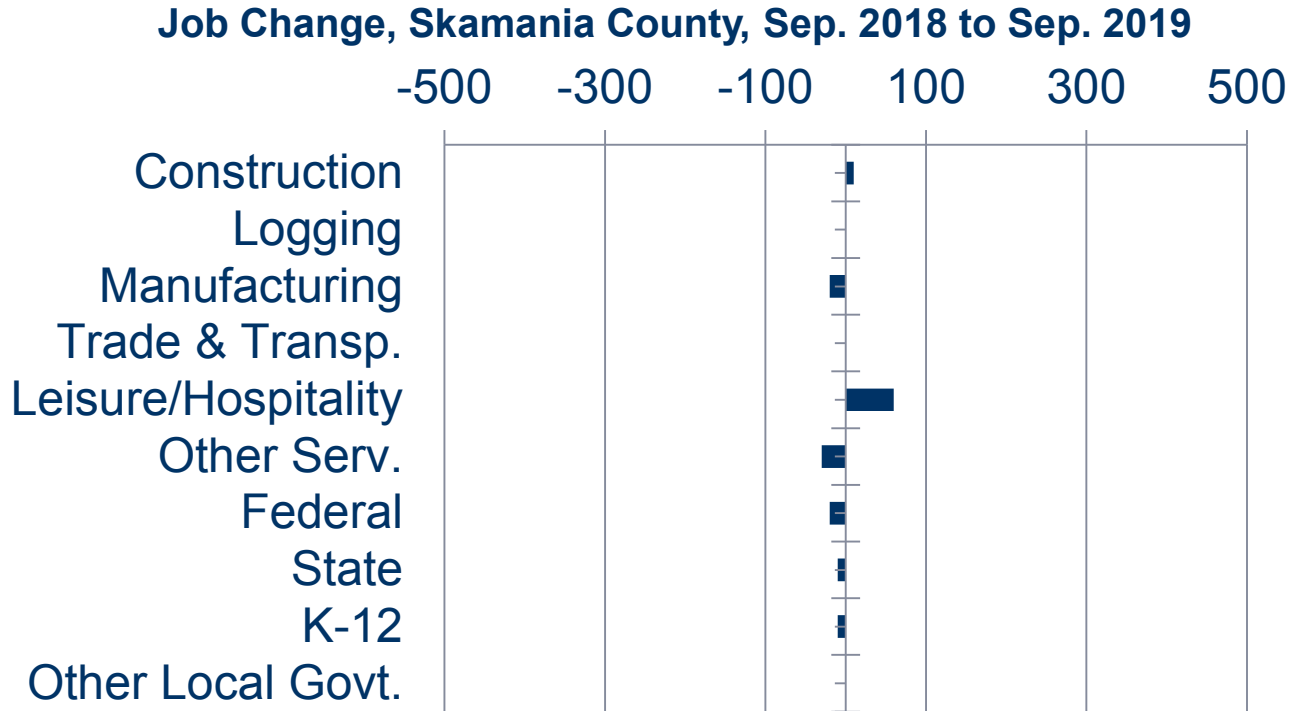
Skamania Nonfarm Jobs

Seasonally-Adjusted Nonfarm Employment



Source: Washington Employment Security
Department/LMEA

Skamania in the Past Year

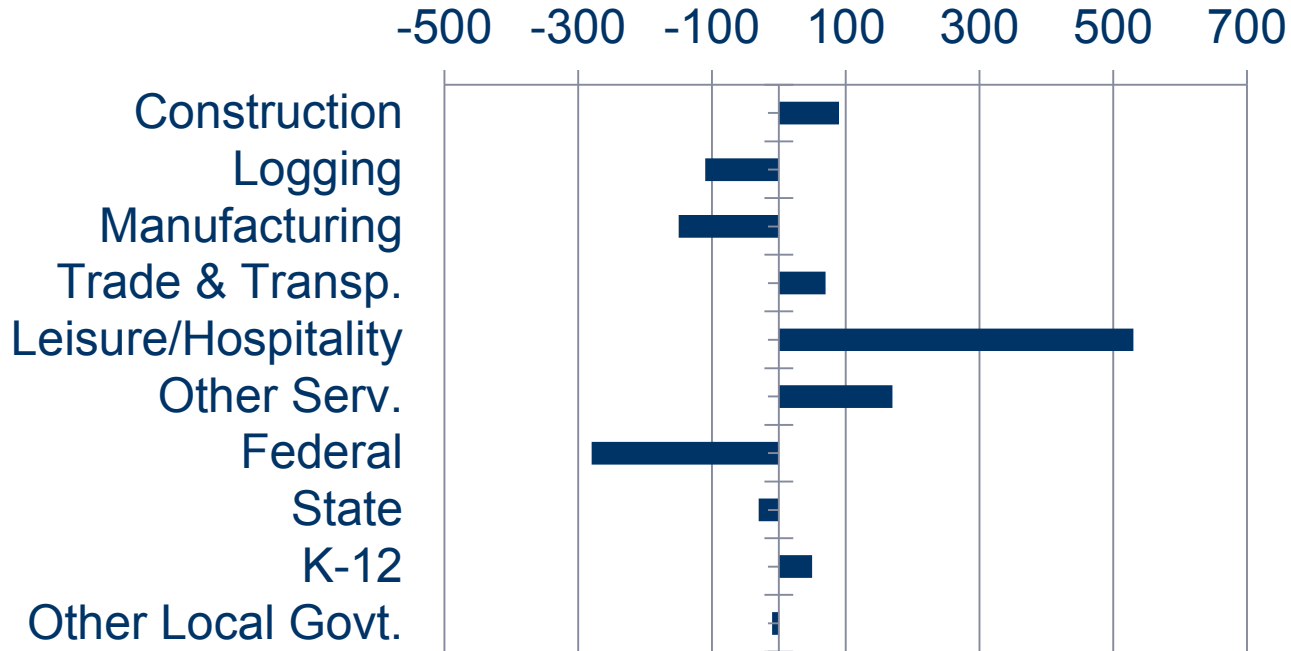


Source: Washington Employment Security Department/LMEA

Skamania in the Past 29 Years

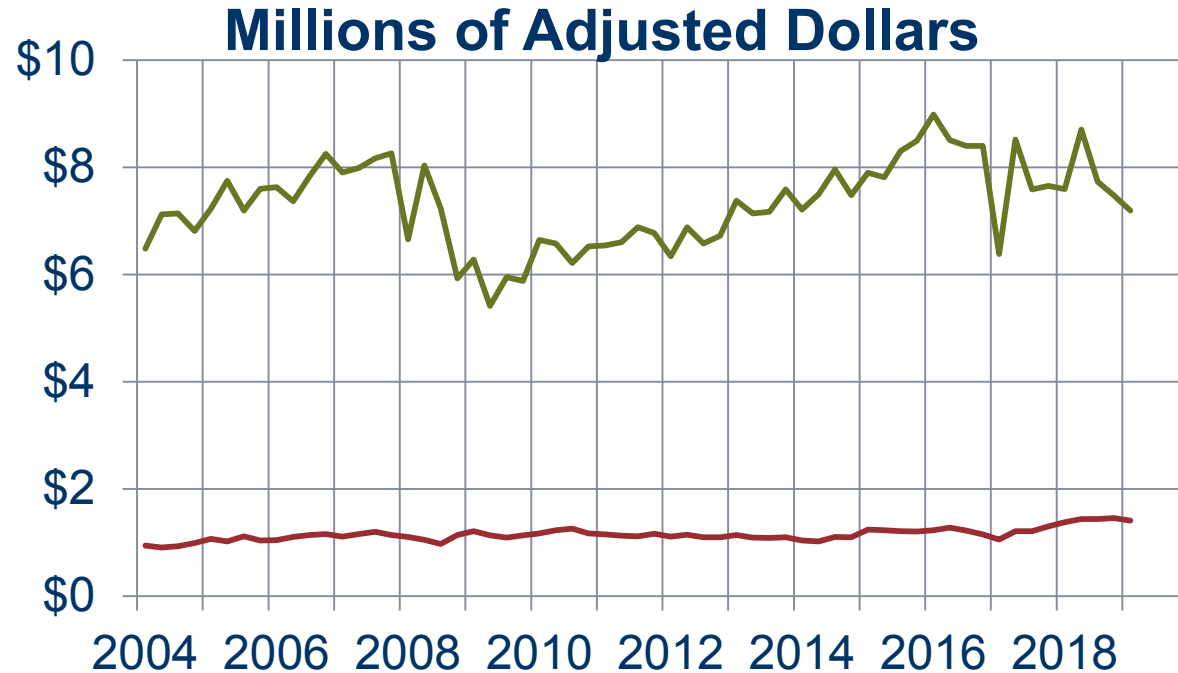
+350 Jobs/18 percent

Job Change, Skamania County, Sep. 1990 to Sep. 2019



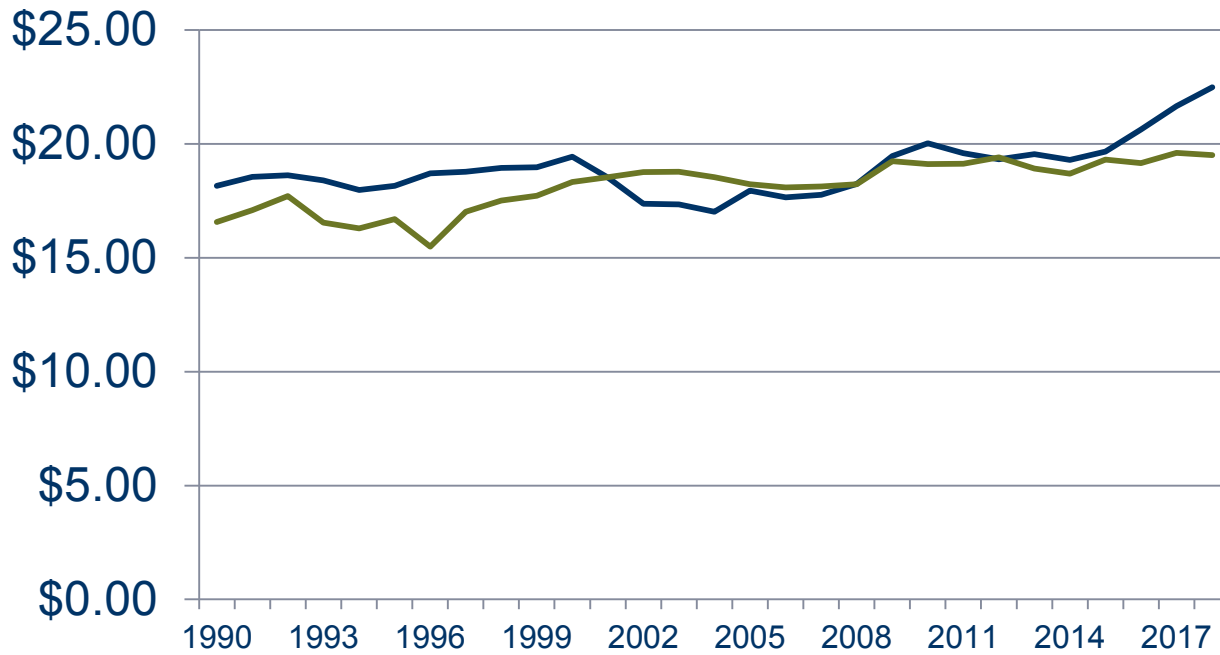
Source: Washington Employment Security Department/LMEA

Taxable Sales for Accommodations and Food Services, Skamania



Source: Washington Dept. of Revenue/ Washington Employment Security Department/LMEA

Median Hourly Wage: Rising in Klickitat, Flat in Skamania



Source: Washington Employment Security Department/LMEA

Minimum Wage Jobs on the Washington Side of the River

- **2018: \$11.50**
- **Klickitat: 211 FTE minimum wage jobs**
 - **+/- 2 percent from the legal minimum**
 - **3.5 percent of all jobs (4.3 in 2017)**
 - **6.4 percent of all wage records**
- **Skamania: 71 FTE minimum wage jobs**
 - **5.0 percent of all jobs (5.6 in 2017)**
 - **8.8 percent of all wage records**

What happens when we hit \$13.50?

- **“What if” exercise: the currently proposed minimum wage increase had been implemented in 2018?**
 - **\$13.50 in 2020 = \$12.96 in 2018 adjusted dollars**

Potential impact

- **572 Klickitat FTE jobs paid below \$12.98**
- **\$1.1 million increase in payroll (0.3 percent) to lift them up to \$12.98**
- **203 Skamania FTE jobs paid below \$12.98**
- **\$0.4 million increase in payroll (0.6 percent) to lift them up to \$12.98**

Contact Info

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