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
Annualized Growth at 0.5% September 2019

Columbia Gorge Total Non Farm Employment, 2001 - 2019

- Total Non Farm
- Moving Average
- Annual Average
Annualized Job Gains/Loss

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

-400
-200
0
200
400
600
800
1,000
1,200
0.5%

Jan May Sep Jan May Sep Jan May Sep Jan May Sep Jan May Sep Jan May Sep Jan May Sep Jan May Sep Jan May Sep Jan May Sep Jan May Sep
Recession & Recovery, OTY Job Gain/Loss

Year-Over-Year Non Farm Job Growth/Decline
Columbia Gorge

-0.8%
Columbia Gorge Employment = 32,265

Total Non Farm Employment September 2019

- Hood River, 12,200, 38%
- Wasco, 10,440, 32%
- Klickitat, 6,390, 20%
- Skamania, 2,290, 7%
- Sherman, 945, 3%
Leading Industries 2008-2018

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

Graph showing growth in various industries from 2008 to 2018, indexed to the 2008 annual average. The industries include Manufacturing + PBS, Education & Health Services, L&H, TNF, and All Other Private.
Manufacturing Employment = 4,430

Manufacturing Employment September 2019

- Hood River: 43%
- Wasco: 14%
- Klickitat: 37%
- Skamania: 6%
Manufacturing Leveled Off in 2019...

Columbia Gorge Manufacturing Industry Employment, 2001 - 2019

Manufacturing
Moving Average
Annual Average
PBS Employment = 2,330

Professional and Business Services Employment September 2019

- Hood River: 49%
- Wasco: 28%
- Klickitat: 23%

Hood River has the highest percentage of PBS employment, followed by Wasco and Klickitat.
Professional & Business Services Cut Jobs in 2019

Columbia Gorge Professional and Business Services Employment, 2001 - 2019

- Professional and Business Services
- Moving Average
- Annual Average
E & HS Employment = 4,380

Education and Health Services Employment
September 2019

- Wasco: 52%
- Hood River: 39%
- Klickitat: 9%
Education & Health Services

Columbia Gorge Education & Health Services
Employment, 2001 - 2019

- Education and Health Services
- Moving Average
- Annual Average
Leisure and Hospitality Employment = 4,830

Leisure and Hospitality Employment September 2019

- Hood River: 46%
- Wasco: 29%
- Klickitat: 9%
- Skamania: 14%
- Sherman: 2%
- Klickitat: 9%
- Skamania: 14%
- Wasco: 29%
- Sherman: 2%
- Hood River: 46%
Leisure & Hospitality, Holding Steady

Columbia Gorge Leisure & Hospitality Employment, 2001 - 2019

Leisure and Hospitality
Moving Average
Annual Average
Agriculture, Forestry & Fishing = 5,680

Agriculture, Forestry & Fishing 2018 AA Employment

- Hood River, 2,491, 47%
- Wasco, 1,496, 28%
- Klickitat, 1,289, 24%
- Skamania, 47, 1%
- Sherman, 23, 0%
Agriculture, Forestry & Fishing: 5,350 Jobs in 2018

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

- Agriculture, Forestry, Fishing and Hunting
- Moving Average
- Annual Average
2017-2027 Forecast: 11% Growth

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

<table>
<thead>
<tr>
<th>Industry</th>
<th>2017</th>
<th>2027</th>
<th>Change</th>
<th>% Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Employment</td>
<td>31,060</td>
<td>34,400</td>
<td>3,340</td>
<td>11%</td>
</tr>
<tr>
<td>Natural resources and mining</td>
<td>4,520</td>
<td>4,790</td>
<td>270</td>
<td>6%</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>2,500</td>
<td>2,800</td>
<td>300</td>
<td>12%</td>
</tr>
<tr>
<td>Professional and business services</td>
<td>1,820</td>
<td>2,120</td>
<td>300</td>
<td>16%</td>
</tr>
<tr>
<td>Health care and social assistance</td>
<td>3,890</td>
<td>4,530</td>
<td>640</td>
<td>16%</td>
</tr>
<tr>
<td>Leisure and hospitality</td>
<td>3,890</td>
<td>4,410</td>
<td>520</td>
<td>13%</td>
</tr>
<tr>
<td>Government</td>
<td>4,120</td>
<td>4,300</td>
<td>180</td>
<td>4%</td>
</tr>
<tr>
<td>Self-employment</td>
<td>2,850</td>
<td>3,250</td>
<td>400</td>
<td>14%</td>
</tr>
</tbody>
</table>
Total Payroll Growth by Year & County

Total All Industries Payroll Growth by Year

- Hood River
- Klickitat
- Wasco
- Skamania
- Sherman

Year: 2008 to 2018

Payroll Growth: $-30,000,000 to $50,000,000
Total All Industries Payroll = $1.6 Billion

Total Payroll by County, 2018

- Hood River: $573,893,947 (37%)
- Wasco: $473,779,614 (30%)
- Klickitat: $393,719,985 (25%)
- Sherman: $75,812,893 (5%)
- Skamania: $39,972,697 (3%)
Total Payroll Growth 2008-2018

Hood River: $223,347,255 (+64%)
Wasco: $147,285,598 (+45%)
Klickitat: $173,173,305 (+79%)
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

- Average
- Hood River CPI Adjusted

Year: 2008 to 2018
Pay: $26,000 to $40,282
2018 Hood River County Pay by Industry

Hood River County 2018 Average Wage by Industry

- Total all ownerships: $40,282
- Total Government: $50,062
- Professional and technical services: $56,196
- Information: $53,266
- Financial activities: $51,849
- Wholesale trade: $50,134
- Manufacturing: $49,475
- Transportation, warehousing & utilities: $49,232
- Management of companies and enterprises: $48,868
- Health care and social assistance: $47,988
- Other services: $47,988
- Retail trade: $32,231
- Natural resources and mining: $27,058
- Administrative and waste services: $26,895
- Educational services: $25,311
- Leisure and hospitality: $21,214

- Hood River County 2018 Average Wage by Industry
Hood River County 2008-2018 Job Gains/Losses by Industry

<table>
<thead>
<tr>
<th>Industry</th>
<th>2008-2018 Job Gain/Loss</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Government</td>
<td>-52</td>
</tr>
<tr>
<td>Professional and technical services</td>
<td>591</td>
</tr>
<tr>
<td>Leisure and hospitality</td>
<td>476</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>377</td>
</tr>
<tr>
<td>Natural resources and mining</td>
<td>283</td>
</tr>
<tr>
<td>Other services</td>
<td>162</td>
</tr>
<tr>
<td>Retail trade (44 - 45)</td>
<td>162</td>
</tr>
<tr>
<td>Transportation, warehousing &amp; utilities</td>
<td>96</td>
</tr>
<tr>
<td>Construction</td>
<td>29</td>
</tr>
<tr>
<td>Financial activities</td>
<td>25</td>
</tr>
<tr>
<td>Administrative and waste services</td>
<td>11</td>
</tr>
<tr>
<td>Information</td>
<td>0</td>
</tr>
<tr>
<td>Educational services</td>
<td>-4</td>
</tr>
<tr>
<td>Health care and social assistance</td>
<td>-20</td>
</tr>
<tr>
<td>Wholesale trade</td>
<td>-93</td>
</tr>
<tr>
<td>Management of companies and enterprises</td>
<td>-98</td>
</tr>
</tbody>
</table>
Wasco County Pay by Industry

Wasco County All Industries Average Pay

Average Wasco CPI Adjusted

$40,678 $30,000 $32,000 $34,000 $36,000 $38,000 $40,000 $42,000


$40,678
### 2018 Wasco County Pay by Industry

#### Wasco County 2018 Average Wage by Industry

- **Total all ownerships**: $40,678
- **Government**: $53,730
- **Information**: $64,035
- **Management of companies and enterprises**: $58,676
- **Professional and technical services**: $57,610
- **Wholesale trade**: $55,168
- **Transportation, warehousing & utilities**: $48,599
- **Health care and social assistance**: $48,551
- **Financial activities**: $42,173
- **Manufacturing**: $41,516
- **Administrative and waste services**: $33,968
- **Retail trade**: $30,297
- **Natural resources and mining**: $26,860
- **Educational services**: $25,143
- **Other services**: $24,503
- **Leisure and hospitality**: $19,320

The highest average wage was in the **Management of companies and enterprises** sector at $151,264.
Sherman County Pay by Industry

Sherman County All Industries Average Pay

- Average
- Sherman CPI Adjusted

2008: $46,697
2009: $34,000
2010: $36,000
2011: $38,000
2012: $40,000
2013: $42,000
2014: $44,000
2015: $46,000
2016: $48,000
2017: $50,000
2018: $52,000

$46,697
Sherman County 2018 Average Wage by Industry

- Total all ownerships: $46,697
- Total Government: $56,907
- Construction: $77,092
- Wholesale trade: $51,377
- Other services: $49,567
- Transportation, warehousing & utilities: $45,259
- Natural resources and mining: $44,431
- Health care and social assistance: $23,428
- Leisure and hospitality: $23,174
- Retail trade: $20,872
Sherman County 2008-2018 Job Gains/Losses

Sherman County 2008-2018 Job Gain/Loss by Industry

- Transportation, warehousing & utilities: Gain 74
- Total Government: Gain 38
- Health care and social assistance: Gain 22
- Natural resources and mining: Gain 13
- Other services: Gain 12
- Retail trade: Gain 6
- Leisure and hospitality: Gain 2
- Wholesale trade: Gain 19
- Construction: Loss 32

The chart shows the job gain/loss by industry, with transportation, warehousing & utilities experiencing the highest gain of 74 positions, followed by total government with a gain of 38 positions. Construction had the highest loss of 32 positions, while leisure and hospitality had the lowest gain of 2 positions.
Employment and wage trends

KLICKITAT & SKAMANIA
Claims Still at Low Levels

Continued Unemployment Claims, Seasonally Adjusted

Klickitat in the Past Year

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

-500  -300  -100  100  300  500

- Construction
- Logging
- Manufacturing
- Wholesale
- Retail
- Transportation
- Prof. & Bus. Serv.
- Health/SA
- Leisure/Hospitality
- Other Serv.
- Federal
- State
- K-12
- Other Local Govt.

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

-500  -300  -100  100  300  500

- Construction
- Logging
- Manufacturing
- Wholesale
- Retail
- Transportation
- Prof. & Bus. Serv.
- Health/SA
- Leisure/Hospitality
- Other Serv.
- Federal
- State
- K-12
- Other Local Govt.

Source: Washington Employment Security Department/LMEA
# Skamania in the Past Year

## Job Change, Skamania County, Sep. 2018 to Sep. 2019

<table>
<thead>
<tr>
<th>Category</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Construction</td>
<td>-100</td>
</tr>
<tr>
<td>Logging</td>
<td>-300</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>-500</td>
</tr>
<tr>
<td>Trade &amp; Transp.</td>
<td>-100</td>
</tr>
<tr>
<td>Leisure/Hospitality</td>
<td>100</td>
</tr>
<tr>
<td>Other Serv.</td>
<td>300</td>
</tr>
<tr>
<td>Federal</td>
<td>500</td>
</tr>
<tr>
<td>State</td>
<td>300</td>
</tr>
<tr>
<td>K-12</td>
<td>100</td>
</tr>
<tr>
<td>Other Local Govt.</td>
<td></td>
</tr>
</tbody>
</table>

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

-500  -300  -100  100  300  500  700

Construction
Logging
Manufacturing
Trade & Transp.
Leisure/Hospitality
Other Serv.
Federal
State
K-12
Other Local Govt.

Source: Washington Employment Security Department/LMEA
Taxable Sales for Accommodations and Food Services, Skamania

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
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