

INDICATORS
UNEMPLOYMENT RATE
Oregon (Seasonally Adjusted)

August	2004	7.4
July	2004	6.8
August	2003	8.4

United States (Seasonally Adjusted)

August	2004	5.4
July	2004	5.5
August	2003	6.1

**MANUFACTURING WORKER
AVERAGE HOURLY EARNINGS**
Oregon

August	2004	\$15.27
July	2004	\$15.49
August	2003	\$15.01

**MANUFACTURING WORKER
AVERAGE WEEKLY HOURS**
Oregon

August	2004	39.4
July	2004	38.6
August	2003	39.6

**CONSUMER PRICE INDEX (CPI)
1982-84 = 100**
All Urban Consumers
Portland-Salem, OR-WA

Jan-June	2004	189.8
Yearly Change		2.0%
Annual Average	2003	186.3
Yearly Change		1.4%

United States

August	2004	189.5
Yearly Change		2.7%
Annual Average	2003	184.0
Yearly Change		2.3%

Portland Hotline (503) 326-2081

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Low-wage Industries Fuel Much Of Oregon's Job Growth

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Industry Wage Levels

Table 1 lists the top five industries in Oregon by wage level. Restaurants – full- and limited-service – were the largest component of the state's low-wage industries, which are defined in this article as those with an annual average wage more than 10 percent below the statewide average of \$34,400. Restaurants account for about one in six low-wage industry jobs.

Health care industries were the largest high-wage employers, defined here as those with an annual average wage more than 10 percent above the statewide average. Ambulatory health care services and hospitals accounted for a little more than one in six high-wage industry jobs.

Local government was the largest average-wage industry employer, accounting for nearly half of the state's average-wage industry employment.

- Continued on page 2

Introduction

Since experiencing prolonged and rapid job growth in the 1990s, Oregon's economy has seen negative effects of the Asian financial crisis and the national recession. Oregon's economy was especially hard hit by the recent recession, due to its reliance on such durable goods manufacturing industries as high technology, transportation equipment, and metals. Between November 2000 and June 2003, Oregon's economy shed about 65,000 jobs. Since June 2003, when the state's economy hit its low point, it has added close to 40,000 jobs. But which industries were most affected during the downturn and which have been driving this recent growth?

Key Findings

- Oregon's low-wage industry employment has increased.
- Low-wage industry employment declined more slowly than average-wage and high-wage industries during the recession. It has grown more rapidly since employment reached a low point in June 2003.
- High-wage industries shed nearly 30,000 jobs between January 2001 and June 2003, accounting for nearly half the state's job loss. Since June 2003, high-wage industries have added nearly 12,500 jobs.
- Since the recession, most of the new jobs in rapid-growth industries came from low-wage industries. Although high-wage industries are growing more slowly overall, several high-wage industries grew rapidly.
- High-wage industries accounted for a larger share of the jobs added since the 2001 recession than they did after the early 1990s recession. Low-wage industries accounted for more of the growth following the early 1990s recession. However, the early '90s recession was quite different and much less severe than the most recent one.

▼ TABLE 1

Oregon: Industries with the Largest Number of Jobs by Wage Level

Industry Wage Level/Title	June 2004 Employment*	2003 Average Annual Wage
<u>Low-Wage Industries:</u>		
Full-service restaurants	53,200	\$13,900
Limited-service restaurants	47,600	\$11,000
Nursing and residential care facilities	37,100	\$19,100
Food and beverage stores	36,800	\$20,100
Employment services	35,400	\$20,200
<u>Average-Wage Industries:</u>		
Local government - education	94,400	\$31,900
Local government - noneducation	83,600	\$37,500
Motor vehicle and parts dealers	26,800	\$37,300
Other durable goods manufacturing	23,500	\$34,500
Truck transportation	17,400	\$35,600
<u>High-Wage Industries:</u>		
Ambulatory health care services	58,700	\$45,900
Hospitals	48,000	\$40,800
State government - noneducation	35,500	\$40,900
Merchant wholesalers, durable goods	34,100	\$47,600
Credit intermediation and related activities	31,000	\$47,800

*Employment data are seasonally adjusted.

All Industry Wage Levels Declined During Economic Down Period

From late 2000 through June 2003, Oregon's nonfarm payroll employment declined by roughly 65,000 jobs or 4 percent. This downward trend was evident in all industry wage levels, but high-wage industries experienced the largest losses. Between January 2001 and June 2003, employment in high-wage industries declined by 4.8 percent (29,400 jobs), while average-wage industry employment fell by 4.6 percent (18,300 jobs) and low-wage industry jobs dropped by just 2.4 percent (14,800 jobs).

From January 2001 through January 2002, job loss was evident in all industry wage levels (Graph 1). After this period, the trends differed as low-wage industries began adding employment while high-wage industries continued to decline.

Low-wage industry employment fell by a little more than 3 percent between January 2001 and June 2003. This group reached its lowest level of the recession in January 2002. After that, jobs in low-wage industries started to grow, peaking in October 2002. Job growth during this period was driven by administrative and waste services,

which includes employment services, business support services and services to buildings and dwellings. After October 2002, low-wage industry employment declined at a modest rate through June 2003.

While jobs in low-wage industries started to rise in 2002, jobs in high-wage industries continued to decline, reaching their lowest levels for the period in June 2003. High-tech industries were among the top industries contributing to the decline with losses

in semiconductor and electronic component manufacturing, and computer system design and related services. Average wage industries saw a steep decline in 2003, with losses in local government and several durable goods manufacturing industries.

Recent Job Growth Across All Wage Levels

Since June 2003, the state's economy has added close to 40,000 jobs. Have Oregon's high-wage industries been regaining jobs lost during the recession or have low-wage industries been driving recent employment growth?

While jobs are being added across all wage-level categories, jobs in the state's low-wage industries are growing faster than jobs in average- and high-wage industries (Graph 2). From June 2003 to June 2004, low-wage industry jobs grew by more than 3 percent (19,800 jobs), while high-wage and average-wage industry jobs increased by roughly 2 percent, adding 12,500 and 7,000 jobs, respectively.

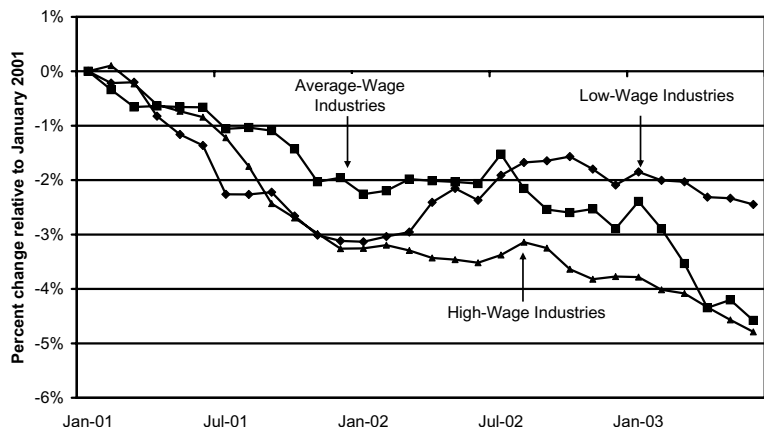
As a result, low-wage industries account for a growing share of Oregon's employment since the start of the recent recession.

Growth Rates Vary Within Industry Wage Levels

Although low-wage industries have had the most rapid growth, not all

▼ GRAPH 1

Oregon: Percent Change in Employment* by Industry Wage Level January 2001 to June 2003



*Employment data are seasonally adjusted.

low-wage industries have grown. Likewise, although high-wage industries as a group have grown relatively slowly, some high-wage industries have seen rapid growth.

To better understand these dynamics, growth is considered in two categories: rapid and slow. Rapid growth is defined in both absolute numbers and at higher rates than the state average (2.5%) from June 2003 to June 2004. Slow-growth industries are those that grew in absolute numbers, but slower than the state average. Industries losing jobs are classified as declining.

Between June 2003 and June 2004, rapid-growth industries accounted for nearly 46,000 new jobs (Graph 3).

Low-wage industries accounted for most new jobs in rapid-growth industries and grew by nearly 8 percent, compared with about 5 percent growth for rapid-growth high-wage industries. Leading this rapid growth in low-wage industries are business support services and limited-service eating places. For rapid-growth high-wage industries, growth is led by ambulatory health care services and building equipment contractors.

Although Oregon's economy added jobs from June 2003 to June 2004, some industries were declining. Together, these declining industries lost 12,500 jobs. Low-wage industries accounted for nearly half of those losses, with 5,800 job losses, falling by a little less than 3 percent compared with a little more than 3 percent for declining high-wage industries.

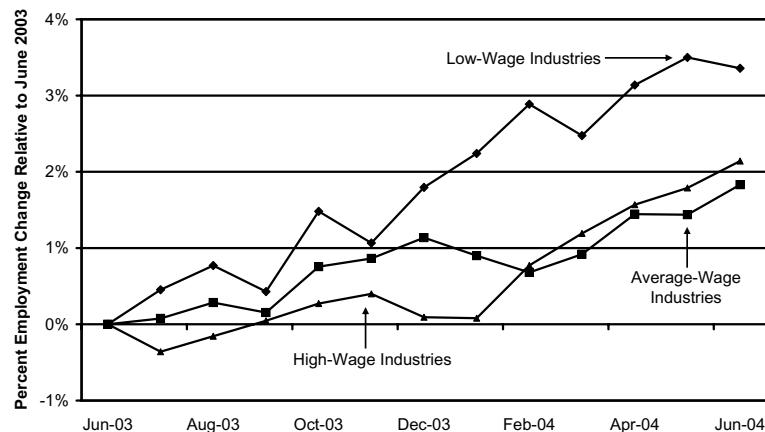
Private educational services, general merchandise stores, and gasoline stations were among the hardest-hit low-wage industries. Insurance carriers had the largest losses among the state's high-wage industries.

Comparison With Early 1990s Recession

These trends paint a bleak picture of employment growth. Still, it is possible that they are not unique to the most recent recession. That is, it is possible that high-wage industries tend to be hit harder by recessions and that low-wage industries tend to be the first

▼ GRAPH 2

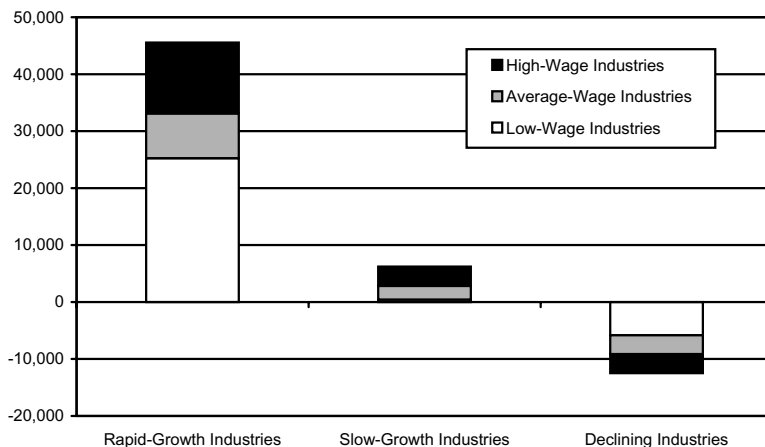
Oregon: Percent Change in Employment by Industry Wage Level June 2003* to June 2004



*Employment data are seasonally adjusted.

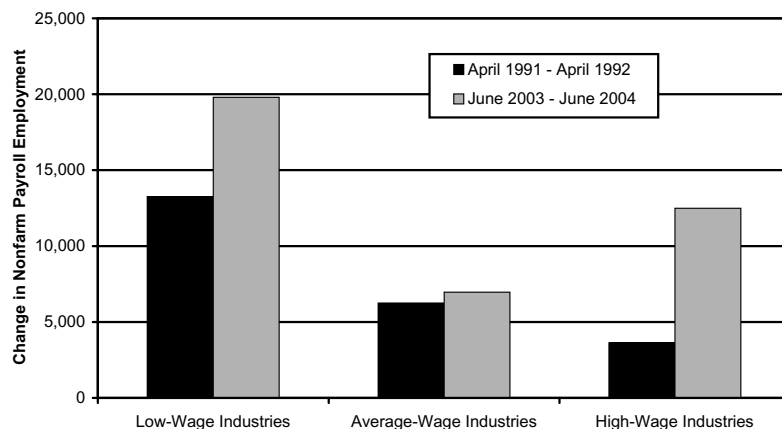
▼ GRAPH 3

Oregon: Change in Employment by Wage Level and Employment Growth, June 2003 to June 2004



▼ GRAPH 4

Oregon: Employment Growth by Industry Wage Level Following Employment Trough*



*Employment data are seasonally adjusted.

- Continued on page 4

October is Disability Employment Awareness Month

In 1988, Congress designated October as National Disability Employment Awareness Month – a time to acknowledge the employment needs and contributions of individuals with all types of disabilities. This year, U.S. Labor Secretary Elaine Chao selected “You’re Hired! Success Knows No Limitations!” as the official theme for the month.

The 2000 Census counted almost 234,000 Oregonians between the ages of 16 and 64 with an employment disability – one that makes working difficult. That’s slightly more than one in 10 of all Oregonians in that age group. For more information on Oregon’s population of individuals with disabilities, see “Ready, Willing and Able” on page 1 of the June 2004 issue of *Oregon Labor Trends*, available online at:
<http://olmis.emp.state.or.us/pubs/olt/04/olt-0604.pdf>.

Several Oregon businesses offer specialized training and job-coaching services to people with disabilities. Besides helping workers with disabilities find and keep jobs, these services can reduce company costs associated with new hires. To find out more about the benefits of hiring workers with disabilities, visit these Web sites:

- Oregon Rehabilitation Association, www.oregonrehabilitation.org
- Oregon Disabilities Commission, www.odc.state.or.us

For help with hiring people with disabilities, visit the Employer Services site of the Office of Vocational and Rehabilitation Services at <http://vrdweb.hr.state.or.us/employment/employer/employment.htm>. Also visit the Services for Employers site of the Oregon Commission for the Blind at www.cfb.state.or.us/employers.htm.

At the national level, the Office of Disability Employment Policy (ODEP) is responsible for leading the month’s activities. Throughout the year, the office specifically addresses policies that affect the employment of people with disabilities. It acts as a catalyst to stimulate new ideas about employment through research and development, policy analysis, grant awards, technical assistance and the promotion of effective business practices. For more information on the office’s activities, visit the ODEP Web site at www.dol.gov/odep.

Public recognition of people with disabilities began well before Congressional action in 1988. In 1945, Congress established “National Employ the Physically Handicapped Week” as the first week in October of each year. President Harry S. Truman designated the President’s Committee on Employment of People with Disabilities to carry out the law. “Physically” was removed from the week’s title in 1962 to recognize the employment needs and contributions of individuals with all types of disabilities. Congress expanded the designation from a week to a month in 1988 and changed the name to National Disability Employment Awareness Month. The responsibility for leading the nationwide recognition was transferred to ODEP in 2001. ■

“
The recession of the early ‘90s was mild and short-lived compared with the most recent recession.
”

to recover while high-wage industries lag. To see if the recent trends are unique, Oregon’s data was examined for the year following the trough of the relatively mild recession in the early 1990s.

The recession of the early ‘90s was mild and short-lived compared with the most recent recession. The state lost roughly 20,000 jobs between August 1990 and April 1991. Oregon’s seasonally adjusted employment hit bottom in April 1991. One year later, the state had added a little more than 23,000 jobs. Were the new jobs coming out of the early ‘90s recession also led by low-wage industries or were high-wage industries driving growth?

Low-wage industries added a larger number of jobs in the year after the early 1990s trough (Graph 4), accounting for well over half of the new jobs. High-wage industries accounted for about 16 percent of the new jobs, well below the fraction added by high-wage industries during the most recent recession (31.8%). Apparently, the relatively small fraction of jobs added by the state’s high-wage industries during the recent recession is not unique.

Will Oregon’s low-wage industries continue to outpace job growth in high-wage industries? Only time will tell, but job growth among the state’s high-wage industries has grown steadily in 2004, outpacing growth in low-wage industries since January. ■

Oregon's Unemployment Rate Rises to 7.4 Percent

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Oregon's seasonally adjusted unemployment rate rose from 6.8 percent in July to 7.4 percent in August, marking the first time the state's rate has been above 7 percent since March, when the rate was 7.2 percent (Graph 1). This increase followed the April through July period, when the rate ranged between 6.7 percent and 6.9 percent. The last time the unemployment rate was above 7.4 percent was January 2004, when the rate was 7.7 percent.

In August, 127,846 Oregonians were unemployed compared to 122,505 in July. However, over the past year, the number of unemployed has dropped substantially, as there were 147,090 Oregonians unemployed in August 2003.

Payroll Employment Slips in August

Seasonally adjusted payroll employment declined by 900 jobs in August, after an upwardly revised gain of 2,000 jobs in July (Graph 2). This means that Oregon's total nonfarm payroll employment performed below expectations in August. Some of the strong job gains in the spring, when the weather was unusually warm and dry in Oregon, may have taken away from normal summer job gains.

Trade, transportation, and utilities added 500 jobs for the month when a gain of 1,500 would be the normal seasonal change for August. Every other major industry performed closer to its normal seasonal trend for the month. Government jobs were cut back by 1,700, which was 500 larger than the normal reduction for the month. However, construction added 2,200 jobs, which was 300 more than the typical August gain. Also, professional and business services gained 2,400 jobs, while a gain of only 1,800 would have been the norm.

Trade and Government Employment Retreat

Trade, transportation, and utilities cut jobs on a seasonally adjusted basis by 1,000 in August after a decline of 2,000 in July. These slippages in growth followed solid gains during the first half of the year, when seasonally adjusted employment grew by 8,500.

Over the past 12 months, employment growth in both wholesale trade and retail trade has been moderate, with gains of close to 1 percent in each industry. In August, the largest employment swing was felt in building

material and garden supply stores, which shed 1,000 from their payrolls.

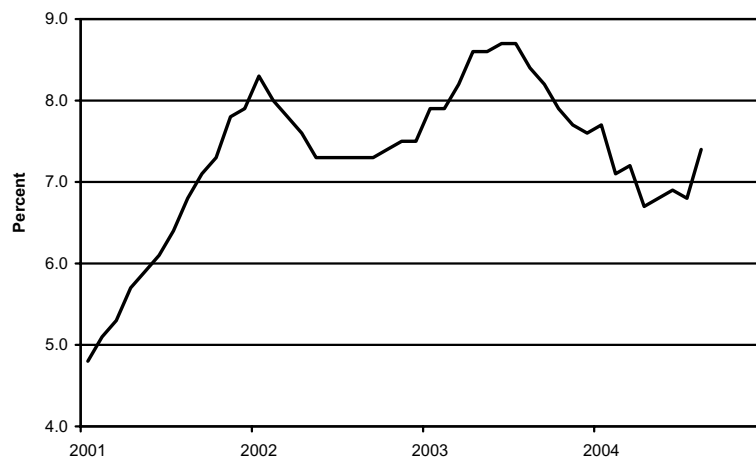
Government cut 1,700 jobs in August as both state government education (-600) and local government education (-900) reached the low point of their summer break period. Meanwhile, federal government shed 300 jobs from July's high of 32,200 to the August figure of 31,900.

Federal government employment is typically at its peak in July and August as agencies that deal with forestry and agricultural matters hire seasonal

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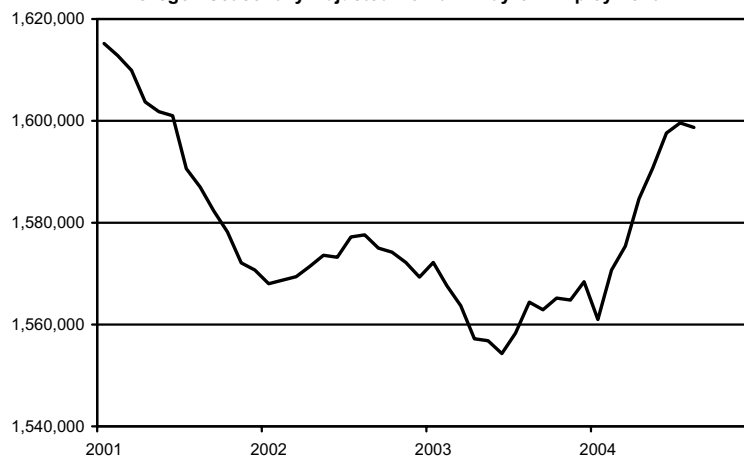
▼ GRAPH 1

Oregon's Unemployment Rate Climbs in August



▼ GRAPH 2

Payroll Employment Pauses in August
Oregon Seasonally Adjusted Nonfarm Payroll Employment



workers. Over the past 10 years, federal government employment in Oregon rarely has exceeded 32,000; only during the 2000 Census has federal government employment been substantially above that level.

Construction and Business Services Gain Jobs

Construction has been one of the leading economic engines in Oregon this year. The industry gained 2,200 jobs in August to reach a level of 86,600. Employment in the industry is now nearly 5 percent above its level of last August. For the month, growth was noted in all of its published component industries.

Professional and business services has been one of the key beneficiaries during Oregon's economic recovery.

This sector, which accounts for one in nine payroll jobs, has grown by 5 percent over the past year.

“In August, employment services grew by 1,700 to a level of 39,800 jobs.”

Many industries within professional and business services have expanded substantially over the past 12 months. These include business support services (+2,200), services to buildings and dwellings (+2,200), employment services (+1,800), management of companies and enterprises (+1,100), and legal services (+500).

In August, employment services grew by 1,700 to a level of 39,800 jobs. The industry reached its highest level in nearly two years at the peak of its busy summer season.

Summary

Oregon's August unemployment rate gives us a new view of the state of the economy. Its reading of 7.4 percent, coupled with other labor force data, indicate that the economic recovery may not be keeping pace with the demand from individuals for jobs. Meanwhile, the July and August payroll employment figures show that the rapid job gains of the first half of the year are not being repeated so far in the third quarter. ■

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Can You Help Me Find My Labor Market?

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Every month we publish data on employment in Oregon as a whole and more than 30 single- and multi-county areas called labor markets. Other states do the same. All but two of Oregon's sub-state labor market areas are individual counties. Do such counties really constitute labor markets? Don't people freely commute across these county labor market boundaries? Doesn't commuting affect the definition of labor market areas and the interpretation of labor market data?

In general, labor market refers to the market in which workers compete for jobs and employers compete for workers.

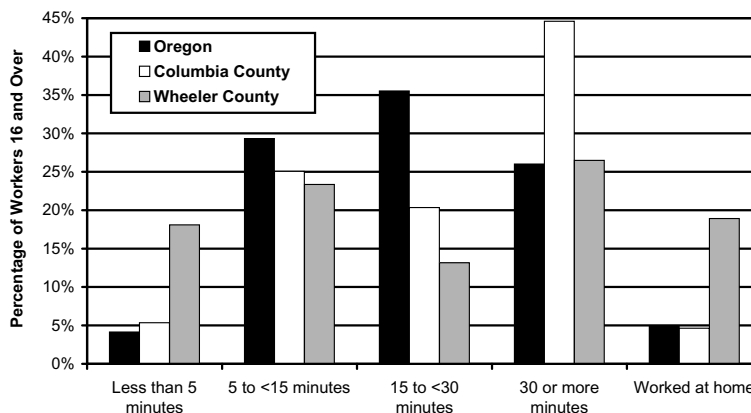
We can use a number of criteria to define and measure a labor market. The criteria used to establish a labor market gives the measure meaning. Often, the process of measuring labor force statistics has less to do with labor market concepts than with quantifying or disaggregating political boundaries. With this in mind, a reasonable place to start on our quest to identify labor markets would be to consider what is actually being measured.

What Government Statistics Measure

In general, labor market refers to the market in which workers compete for jobs and employers compete for workers. Labor markets can be as large as the entire world for very specialized workers and jobs or as small as the region within a short commute. While job searches and worker recruiting may span the country, most analysts typically use the term labor market to refer to the area within which workers can commute to a new job without moving from their current residence.

▼ GRAPH 1

Travel Time to Work and Working at Home, Oregon, Columbia and Wheeler Counties



Source: 2000 Census

Another often used term, "laborshed," incorporates essentially the same concept of referring to the area or market from which an employment center draws commuting workers.

Monthly and annual labor force statistics reported by the Oregon Employment Department and the Bureau of Labor Statistics are established primarily on county-to-county commuting patterns. Commuting patterns help determine the labor force area within which people can live and find work within a reasonable distance or can readily change employment without changing their place of residence. For example, one of the more basic requirements used to establish a multi-county labor force using the 1990 Census was that 15 percent or more of the employed workers living in one county commuted to another county. Failing to reach that benchmark, the individual county is the default area for which labor force data (total labor force, total employment, unemployment and unemployment rate) are measured. Most labor force statistics reported monthly in Oregon were established using the default criteria.

At the community level, plenty of labor markets in Oregon cross county boundaries. However, since our statistical data series are compiled at the county level, it's not very often that these community level relationships are discussed or quantified.

That is changing with the development of a highly detailed labor workflow database. The product, developed by Excensus LLC (<http://excensus.gritechnologies.com/>), summarizes home-to-work commuting patterns at a census block level while also providing a breakout of workers and employment by wages earned and industries served. Although not currently available for Oregon, the online prototype using Minnesota data provides a fascinating view of the effort to connect the dots between workers and jobs.

Workers and Commuting

Education and training help determine work and career choices. While workers can shape their choices through specific educational and training pursuits, suitable matches may not be available in some labor markets. Career pursuits can limit or even determine where you will live. A career in the military offers plenty of options, although your home town is probably not on the list for most military careers.

According to 2000 Census worker flow data, the average time of commute to work in Oregon, was about 22 minutes. Not everyone commuted to work, and the share of workers who stayed home in Oregon was 5.0 percent.

- Continued on page 8

Wheeler County workers had the longest commuting time in Oregon, averaging more than 30 minutes. On the other hand, Wheeler County also ranked first for the largest share of home-based workers, with 115 workers – nearly 19 percent, staying at home (Graph 1). Home-based workers in Wheeler County are largely farm operators. According to the 2002 Census of Agriculture, there were 113 farm operators in 2002 whose primary occupation was farming. The average size of a farm in 2002 was 4,501 acres and the median size was 778. With 1,713 square miles of land and 1,550 residents in 2003, the county's population density was one person for every 1.1 square miles. Oregon's population density was about 36 persons per square mile. In other words, folks are really spread out in Wheeler County, with more than half living in unincorporated areas.

To Drive or Not to Drive?

The distance a worker will commute for work represents, in part, a trade-off between commuting costs and housing costs. A strong attachment to a community, quality of life and family ties can also be a factor in commuting decisions. The overriding consideration for most workers, however, may be maximization of income and leisure, while keeping hours worked and such time-related measures as commuting to a minimum.

Slightly more than 20 percent of Wheeler County's workers commuted to neighboring counties, primarily Gilliam (5.9%) and Crook (4.1%). At the place level (city, town, etc.), Mitchell residents had the longest travel time to work, at 27 minutes, followed by Fossil at 23 minutes and Spray at 16.

Not every scenario will provide a model of economic theory. And the factors affecting travel times in Wheeler County might be more complicated than earnings, leisure time or length of commute. Residents in Mitchell had the longest travel time. Yet, they also had the lowest median earnings in 2000, at just \$13,438. In Spray, where the average commute was just 15 minutes, median earnings were about the same, at \$13,750. Fossil had an

average commute of 23 minutes, but its median earnings were much higher, at \$19,464. Housing values showed an inverse relationship with average commute times, with Spray posting a median value of \$76,000, followed by Fossil, at \$61,200, and Mitchell, at \$54,200. Spray was the leader for self-employment, at better than one in four workers, followed by Mitchell (17%), and Fossil (11.6%).

One employer can tip the balance. Residents in Fossil are part of the laborshed for some jobs in Gilliam County. Waste handling activities in Gilliam County represent a likely source of full-time work that might not be accessible to residents in Mitchell or Spray. Crook County's Prineville is a more likely commute for Mitchell residents. The bottom line for Wheeler County workers appears to be isolation and a lack of significant choices.

A Tale of Two Cities

Columbia County was also high on the list for commuting in Oregon, coming in second-highest with an average travel time of more than 29 minutes. The share of workers living in Columbia County who were home based was just 4.6 percent, giving it a ranking of 30th out of 36 counties. According to 2000 Census worker flow statistics, only 49.7 percent of Columbia County's resident workers actually stayed in Columbia County. The rest commuted to neighboring counties. Columbia County actually has fewer jobs than workers and it functions as a laborshed for neighboring metropolitan counties – particularly Multnomah and Washington counties. The degree of commuting to jobs in Multnomah and Washington counties is great enough that Columbia County is counted as part of the Portland-Vancouver OR-WA primary metropolitan statistical area.

Columbia County's St. Helens is fairly close to the Portland area, and the average travel time for its commuters was 25 minutes. It is interesting to note that Scappoose is closer to the Portland area than St. Helens, and yet the average time traveling to work was higher, at 26.3 minutes. Earnings in 2000 were also higher in Scappoose, at \$51,965, a premium of \$4,545 compared with St. Helens' \$47,420.

Census worker flow data is also available at the city level, and additional details for St. Helens reveal that 40 percent of its workers stay in town. Closer to the Portland area, in Scappoose, the share of workers staying in town was just 22 percent. That means the other 78 percent leave town. A look at travel times shows 36 percent of St. Helens workers are on the road for 40 or more minutes compared with just 22 percent in Scappoose.

A comparison of earnings and commuting times in St. Helens and Scappoose appears to support the idea that higher earnings offer workers the incentive to commute a longer distance.

Wide Open Spaces

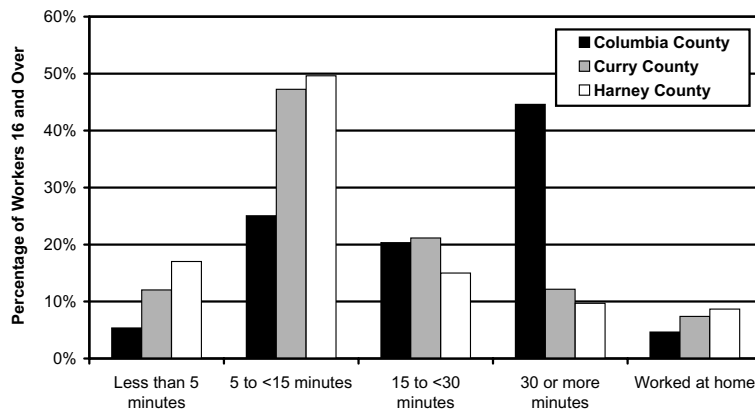
Harney County was a mirror image of Columbia County (Graph 2), ranking fifth for its home-based workers, with an 8.7 percent share, and 35th for average travel time at just shy of 15 minutes. Nearly 98 percent of Harney County's workers remained within its borders for work, the highest level in Oregon. Harney County is the largest in Oregon and the ninth-largest county in the United States. Put mildly, there is a lot of ground to cover in Harney County, and its two incorporated cities, Burns and Hines, are close to each other.

Curry County had the lowest average travel time in Oregon at just 14.4 minutes. However, that statistic was not due to a lack of commuting to neighboring counties. Nearly one in 10 Curry County workers traveled beyond its borders for work. A hefty 6.3 percent commuted out of state – primarily to California. Brookings is the last Oregon city on Highway 101 before entering California, which is just six miles away, and the Lucky 7 Casino is just a few miles farther.

Brookings is a much bigger community than such incorporated places as Port Orford in the northern portion of Curry County, or Gold Beach, near the center. Median housing values are drastically different, with Brookings holding the top spot, at \$142,900, while Gold Beach (\$111,100) and Port Orford (\$89,800) are considerably lower. Earnings follow the same pattern, with the median in Brookings measuring

▼ GRAPH 2

Travel Time to Work and Working at Home, Columbia, Curry and Harney Counties



Source: 2000 Census

\$18,848, followed by Gold Beach, at \$15,574, and Port Orford, at \$12,628. Due to its size advantage and proximity to neighboring California, workers in Brookings likely have more choices for full-time work. In Port Orford, self-employment was much more prevalent, with about 17 percent of its workers staying home, compared with just 3 percent in Gold Beach, and 6.6 percent in Brookings. Gold Beach is only 25 miles from Brookings, while Port Orford is another 25 miles to the north. Apparently, that's too far of a commute for most workers.

Conclusion

Labor force data is reported for 31 labor market areas in Oregon. County boundaries generally define Oregon's labor market areas, including those of the two multi-county metropolitan statistical areas. Labor force data, however, do not always describe the laborshed from which an employment center draws its workers. Some people in the laborshed live outside the labor market area.

Many factors determine where you live and where you work. Higher earnings can lengthen commuting options, but some locations are beyond a reasonable commute to high-paying jobs. Educational and training choices can also open opportunities for higher earnings; however, very specialized education and training can narrow or even define your choices of where to live. Commuting patterns offer an insight into these choices.

Oregon workers commuted 22 minutes on average according to the 2000 Census. Pay and proximity to high-paying jobs certainly matters in metro areas like Portland, yet there are examples of long commutes in rural counties, like Wheeler, where self-employment is high and job opportunities are limited.

Most of us would like to maximize our income and leisure, while keeping hours worked and such time-related measures as commuting to a minimum. But Oregon is a big state, and relationships that seem to hold true for the Portland area may not exist in an isolated or sparsely populated county. ■

Vacation Time

While Oregon law does not require employers to provide paid vacation time or paid holidays to their employees, many workers do get vacations and they often take them during the summer. Many full-time employees in the United States receive two weeks of paid vacation and several paid holidays as a benefit in exchange for a year of hard work. How do we compare with other countries? The table provides a comparison of U.S. workers and their counterparts in a few other industrialized countries in 2002, according to IMD World Competitiveness Yearbook for 2003. The comparisons include paid vacation and holiday time, hours worked in 2002, and gross domestic product (GDP) per worker.

Country	Paid Vacation Days and Holidays	Annual Hours Worked	GDP Per Worker
USA	25	1,918	\$95,943
Switzerland	31	1,855	\$73,871
Belgium	32	1,712	\$67,946
Ireland	35	1,798	\$82,765
France	35	1,587	\$60,892
Great Britain	38	1,833	\$68,144
Italy	39	1,732	\$52,841
Netherlands	39	1,686	\$83,381
Germany	43	1,688	\$52,900

Source: IMD, World Competiveness Yearbook 2003

Recent Findings on Employer-provided Benefits

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Economic, social and legal forces have undermined the role of employment-based benefits as a key feature of the labor market and a source of financial security for workers and their families. That's what Brookings Institute Economist Robert Rieschauer foretold some six years ago. And recent trends in employer-provided benefits data that measure the incidence and provision of benefits to U.S. and Oregon workers seem to bear out his prediction.

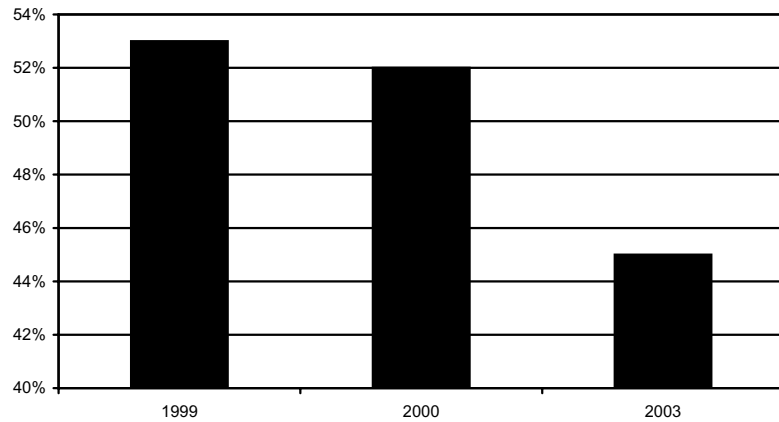
Increasing global competition, declining numbers of workers represented by labor unions, and a recovery from recession that's brought slow job growth are some factors that affect such trends.

Many employer-provided benefits increased in the mid to late 1990s, according to the Bureau of Labor Statistics' (BLS) Employee Benefit Surveys. As the U.S. unemployment rate dipped to about 4 percent in 2000, the Beige Book, published by the Federal Reserve Board, noted the trend toward increasing benefit provision in the May 2000 issue. "Difficulty in finding and retaining qualified employees remained a common refrain in district reports as worker shortage persisted in every district, and practically every industry and occupation," the Fed reported. "Many districts noted lack of available workers continues to hamper overall economic growth; and reports of employers providing retention and referral bonuses, assistance in finding child care, and health benefits were more widespread." Seems like a long time ago in a galaxy far, far away, doesn't it?

The percentage of employees covered by employer-sponsored medical plans has gradually declined.

▼ GRAPH 1

U.S. Incidence of Medical Care Benefits - All Private Industry



Source: National Compensation Survey, Bureau of Labor Statistics

Private Employee Benefits Have Declined

The percentage of employees covered by employer-sponsored medical plans has gradually declined since the early 1990s, according to data from the National Compensation Survey. In March 2003, 45 percent of employees had elected coverage, compared with 63 percent some 10 years earlier. Graph 1 shows the incidence of medical benefits – all private industry from 1999 to 2003. Most employees were enrolled in plans that required contribution for both single and family coverage. Employee contributions to medical care premiums averaged \$228.98 per month for family coverage and \$60.24 per month for single coverage. Since 1992-93, required employee contributions for benefits premiums have risen about 75 percent for single and family coverage.

Just less than half of private industry employees participated in an employer-provided retirement plan. Overall coverage of retirement plans has held relatively constant over the past few years. However, the mix of plans has changed. Defined benefit plans cover a smaller percentage of workers than they did a decade ago, while defined contribution plans cover a larger portion. In March 2003, 20 percent of employees were in defined benefit plans and 40 percent were in defined

Benefits as defined by the BLS included legally required benefits such as Social Security and Medicare.

contribution plans. Some employees took part in both.

Benefit costs, as a percentage of total compensation, have also been increasing in recent years. According to the BLS, benefits costs for nonfarm private industry workers accounted for 28.5 percent of total compensation, in March 2004, compared with 27 percent in March 1999. Benefits as defined by the BLS included legally required benefits such as Social Security and Medicare. Graph 2 displays the compensation of private industry compensation costs as measured by the March 2004 National Compensation Survey.

Many Factors Affect Benefits

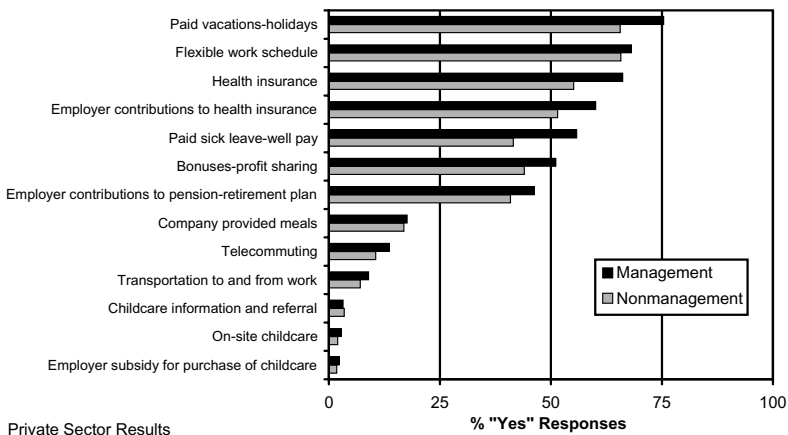
The probability of participating in benefit plans is generally higher for full-time, white-collar workers. It's also usually more likely for union members and employees who earn more than

\$15 an hour. For example, 70 percent of workers earning \$15 an hour or more took part in retirement plans, compared with 35 percent of workers earning less than \$15 per hour. Some 56 percent of full-time workers participated in an employer-provided medical benefit plan, compared with 9 percent of part-time workers. About 90 percent of those working full time received paid holidays and paid vacations, compared with about 40 percent for those working part time. An article in the *March 1999 Monthly Labor Review* noted the cost per hour worked of providing health-care coverage to part-time workers is 18 percent higher than to those employed full time. Health insurance is a “quasi-fixed cost” benefit, according to the report, and therefore – unlike vacation days – is difficult to prorate for hours worked.

The incidence of benefit provision also varies by establishment size, industry and location. Goods-producing employers were more likely to offer benefits than those in service-producing industries. Workers in medium and large private-sector establishments with more than 100 workers also are more likely to receive benefits. The differences were more pronounced for retirement and medical benefits, and less so for paid-leave benefits. Previously, only the percentage of employees who had access to or participated in employer-provided benefits were available. With the new National Compensation Survey, data are now available on the percentage

▼ GRAPH 3

2002 Oregon Employer Survey: Does your organization provide any of the following benefits to your employees?



of establishments that offer employee benefits. While the survey does not publish state-level detail, it does provide geographic detail to the census division. The Pacific census division includes Oregon, Washington, California, Alaska and Hawaii.

Many Oregon Workers Lack Benefits

How does Oregon’s workforce fare in access to and participation in various benefits offered by employers? Data that is statistically comparable to the National Compensation Survey are not available at the state level. However, two recent surveys shed some light

on the issue of employer-provided benefits to Oregon workers. The Oregon Employment Department (OED) surveyed employers in 2000 and 2002. It asked Oregon businesses questions regarding benefits provided to their employees. In a 2002 survey of individuals, the Oregon Office of Economic Analysis asked about health insurance access and participation through their employers.

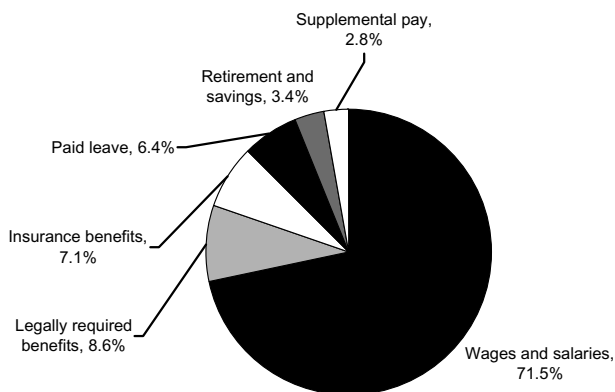
Paid Vacations and Holidays are Most Common

Employers that responded to the 2002 survey also said the most commonly provided employee benefits are paid vacations and holidays (Graph 3). The provision of most major benefits in the 2002 survey was similar to or slightly less common in the 2000 survey. The reductions may be the result of the economic downturn that began in late 2000.

Many major benefits were less common in 2002 than in 2000. However, one benefit – flexible work schedules – seems to have become more common over the past two years. In the 2000 survey, 43 percent of private-sector respondents said they provided “flexible schedule/telecommuting” to regular workers as well as managers. In the 2002 survey, 68 percent said they offer flexible work schedules to managers. About 66 percent said they offer that benefit to nonmanagement staff.

▼ GRAPH 2

U.S. Private Industry Compensation Costs - March 2004



Source: National Compensation Survey, Bureau of Labor Statistics

Differences in Benefits Mirror Prior Survey Results

In the 2002 survey, large firms – those with 10 or more employees – were more likely than small firms to offer all major benefits. For example, 92 percent of large firms provided paid vacations and holidays to employees, compared with only 62 percent of small firms. Some 65 percent of small companies offered flexible work schedules, essentially tying with paid vacations and holidays as the most common employer-provided benefit among such firms.

More private-sector employers give key benefits to managers than to nonmanagers. These benefits include paid vacations and holidays, sick leave or well pay and health insurance. However, a much more similar share of these firms tend to give other, less common benefits to managers and nonmanagers. For example, the share of firms giving bonuses or profit sharing options to managers is only slightly larger than the share providing this benefit to nonmanagers, at 51 percent and 44 percent, respectively.

Fewer Employers Raised Wages and Benefits During Recession

As expected during a recession, a smaller share of Oregon's private and public employers raised wages, or implemented or raised benefits during the year preceding the survey specifically to attract or keep employees. While 86 percent of private-sector employers said they had raised wages in the year before the 2000 survey to attract or retain employees, only 52 percent claimed to have done so in 2002. Most of those respondents reported they raised wages or implemented or raised benefits mostly to keep current rather than attract new workers. It seems likely that the reduction in job opportunities that accompanied the recession also reduced the need to take such measures to attract qualified applicants and retain employees.

The share of respondents saying they had implemented or increased bonuses or profit sharing declined from 23 percent in the pre-recession survey to 14 percent in the 2002 survey.

Similarly, the share of businesses implementing or increasing paid vacations or holidays fell from 23 percent to 16 percent in the past two years. But almost the same share of businesses – about one-fifth in both years – noted flexible work schedules as a benefit that was implemented or increased. A condition of slack demand for labor may have made it easier for employers to grant more flexible – and perhaps reduced – work hours to employees. Since the beginning of the recession, average weekly hours worked has dipped in many Oregon industries.

Between 2000 and 2002, small firms tended to decrease efforts to attract and retain employees more than did large firms. For example, whereas a similar share of large and small firms increased wages before 2000, the difference between the two shares grew to more than 25 percent in 2002. This could be due to lower turnover at small firms and is consistent with the fact that only 14 percent of small-firm respondents said turnover was a serious problem, while 25 percent of those from large firms cited turnover as a serious problem. The lower turnover at small firms is likely because high-turnover industries include more large companies, including retail trade businesses.

Not surprisingly, a larger-than-average share of firms in the finance, insurance and real estate industry raised wages over the past year. This is an industry that fared relatively well during the recession, due partly to attractive interest rates and investors shifting assets from the gloomy stock market to the more buoyant real estate market. Similarly, the substantially lower-than-average share of businesses raising wages in the transportation and public utilities industry is consistent with this industry's weakness in trucking, warehousing and communications.

As in the private sector, a smaller share of local government employers raised wages and benefits in the 12 months before the 2002 survey than did two years earlier. Only two-thirds raised wages, whereas previously almost nine-tenths had done so. There was very little change in the share of employers who said they increased their contribution to health

insurance – a benefit with rapidly rising costs – and used the Internet to attract applicants. Interestingly, flexible schedules were increased by a much smaller fraction of local government employers than by private-sector employers. As job growth and lower unemployment rates have returned to Oregon's economy, employers may begin to provide more benefits provision to attract and retain skilled workers.

Most Oregonians Have Some Health Insurance

According to the 2002 Oregon Population Survey, 85 percent of 4,902 respondents were covered by some type of health insurance. Of those, 44 percent had coverage through their employers. Another 16 percent of respondent who had health insurance coverage obtained it through their spouse's or partner's employer. Of those who had health insurance through their employers, 2,131 respondents – 73 percent – reported sharing insurance premium costs with their employers and 27 percent indicated the employer paid for all of the insurance cost. Those who were employed, but didn't have any health insurance coverage, were asked if health care coverage was offered through their jobs. Of that group, 36 percent said it was not.

Employers Respond to Soaring Benefit Costs

As health care premiums have escalated precipitously in recent years, many employers are capping how much they will pay of retirees' insurance premiums. Average health insurance premiums rose by 15 percent in 2003 and 12 percent in 2004. According to a survey of 435 large companies by the Kaiser Family Foundation and Hewitt Associates, at least half of these major employers have limited the amount they will spend each year on retirees. Other surveys indicate future curtailment of retiree health care benefits and increasing retiree contributions to health care premium costs. Current employees are also shouldering a larger share of the health insurance premium costs. A recent article in USA Today noted current average

premiums for family health insurance policies represent 21 percent of the national median household income of \$42,409. According to Uwe Reinhardt, a Princeton economist, quoted in the article, "What this country is actually doing is gradually pricing the lower third of wage and income distribution out of health care." It is estimated that nationally, there are 43 million who lack health insurance. Soaring health

“Employers are seeking to increase other benefits that will bolster recruitment and retention.”

care and insurance costs are affecting U.S. businesses. The March 6, 2004, edition of the *Washington Post*, quoted Ford Vice Chairman Allan Gilmour, who said high health care costs have "created a competitive gap that's driving investment decisions away from the U.S."

According to a Ford spokeswoman, the company spent \$2.8 billion on health care for its U.S. workers. As more employers embrace and use the newly created Health Savings Accounts (HSAs), they will be able to shift some of the costs of health care to workers and may lower insurance premiums. HSAs were approved by Congress last year as part of the Medicare reform legislation and allow policyholders to set aside money tax-free to cover health care costs, according to a story published in a recent edition of *USA Today*.

Data from the most recent National Compensation Survey shows employers increasingly are getting out of the business of providing health care coverage for their workforce. And those that still do are shifting more costs to their employees.

Incidence of medical care benefits fell from 64 percent in 1999 to 56 percent just four years later in 2003 for full-time workers in private industry. The average employee contribution for family medical coverage – all private industry – rose from about \$170

to \$229 during that four-year span (Graph 4). As we continue to be able to collect and analyze data on employer-provided benefits, these trends will need to be monitored to see if recent legislative attempts to make health care more accessible garner the intended results.

But as employers find ways to reign in health care and pension costs, they are seeking to increase other benefits that will bolster recruitment and retention. A report recently released by the Families and Work Institute highlighted a national survey conducted in 2002 of 2,810 wage and salaried workers. The survey indicated 43 percent have traditional flextime, which allows them to choose their regular starting and quitting times within a range of hours. That's up from 29 percent a decade earlier. Another emerging trend is to allow newly hired employees to begin contributing immediately to retirement plans. A recent survey by Hewitt Associates found 43 percent of large companies allow new employees to enroll in the 401(k) right away, up from 35 percent in 2001. Only about 20 percent of companies now have waiting periods of six months or longer. Companies are said to be making the shift in order to attract better workers.

Conclusion

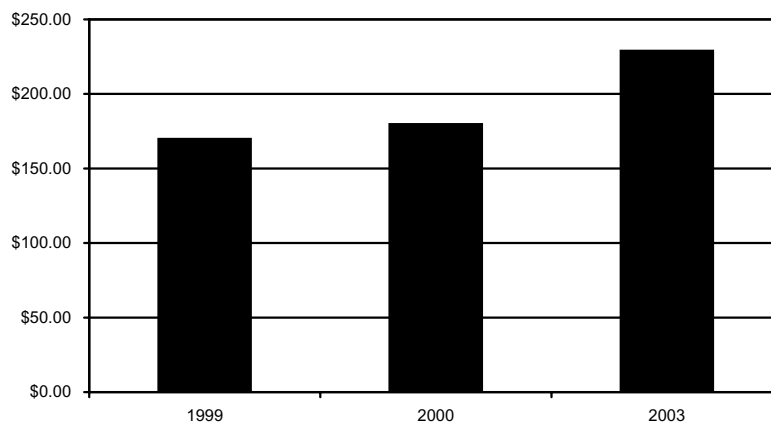
While employers and workers alike grapple with soaring benefit costs, there is a widely held belief that benefits are crucial to business profitability and worker productivity. "Employers

that offer health insurance to their workers generally believe that offering this benefit helps to create a more satisfied and productive workforce," according to an article in the Employee Benefit Research Institute's March 2004 *Issue Brief*.

While these employers cite the need for health insurance benefits for their workers, they offer a note of caution for the future in the *Issue Brief* article. "Employers are becoming increasingly frustrated with annual premium increases that are a multiple of the general inflation rate. Unless and until they come up with a way of managing and finding greater value in such expenditures, the future of employment-based health benefits may be at stake."

As the economy rebounds from recession and resumes a mode of job growth, a tighter labor market may help boost the provision of employer-provided benefits. Other factors such as increasing health insurance premium costs, global competition, decreasing percentage of the workforce that are represented by labor unions and the use of contingent workers will continue to challenge employer's ability to provide employment-based fringe benefits. Businesses may also continue to shift away from more costly defined benefit retirement and fully paid health insurance plans to lower cost benefits like flexible schedules, telecommuting and other creative benefits that will improve retention and recruitment while keeping benefit cost outlays to a minimum. ■

▼ GRAPH 4
Average Employee Contribution for Family Coverage Medical Benefits - All Private Industry



Source: National Compensation Survey, Bureau of Labor Statistics

Oregon Current Labor Force and Industry Employment

	August 2004	July 2004	August 2003	Change From July 2004	Change From August 2003
Labor Force Status					
Civilian labor force	1,870,970	1,877,195	1,883,985	-6,225	-13,015
Unemployed	127,846	122,505	147,090	5,341	-19,244
Unemployment rate	6.8	6.5	7.8	0.3	-1.0
Unemployment rate, seasonally adjusted	7.4	6.8	8.4	0.6	-1.0
Employed	1,743,124	1,754,690	1,736,895	-11,566	6,229
Nonfarm Payroll Employment					
Total nonfarm payroll employment	1,594,000	1,589,100	1,559,700	4,900	34,300
Total private	1,345,100	1,338,500	1,314,700	6,600	30,400
Natural resources and mining	10,100	10,000	9,800	100	300
Logging	7,800	7,700	7,900	100	-100
Construction	86,600	84,400	82,800	2,200	3,800
Construction of buildings	21,200	20,300	20,500	900	700
Residential building construction	12,000	11,500	11,400	500	600
Nonresidential building construction	9,200	8,800	9,100	400	100
Heavy and civil engineering construction	10,800	10,600	10,800	200	0
Specialty trade contractors	54,600	53,500	51,500	1,100	3,100
Building foundation and exterior contractors	12,300	12,200	11,300	100	1,000
Building equipment contractors	22,400	22,000	20,900	400	1,500
Building finishing contractors	11,200	11,000	11,500	200	-300
Other specialty trade contractors	8,700	8,300	7,800	400	900
Manufacturing	204,500	203,800	198,500	700	6,000
Durable goods	150,000	149,900	143,900	100	6,100
Wood product manufacturing	31,800	31,800	31,400	0	400
Sawmills and wood preservation	8,400	8,400	8,600	0	-200
Plywood and engineered wood product mfg.	10,900	11,000	11,200	-100	-300
Other wood product manufacturing	12,500	12,400	11,600	100	900
Primary metal manufacturing	9,300	9,200	8,400	100	900
Fabricated metal product manufacturing	14,700	14,800	14,800	-100	-100
Machinery manufacturing	12,000	12,200	11,500	-200	500
Computer and electronic product manufacturing	41,700	41,500	40,600	200	1,100
Computer and peripheral equipment mfg.	3,800	3,700	3,600	100	200
Semiconductor and electronic component mfg.	30,800	30,600	29,800	200	1,000
Electronic instrument manufacturing	5,500	5,500	5,500	0	0
Transportation equipment manufacturing	16,400	16,400	15,000	0	1,400
Nondurable goods	54,500	53,900	54,600	600	-100
Food manufacturing	23,800	23,500	24,000	300	-200
Fruit and vegetable preserving and specialty	10,900	10,400	11,200	500	-300
Paper manufacturing	7,000	7,000	6,800	0	200
Printing and related support activities	7,400	7,300	7,600	100	-200
Plastics and rubber products manufacturing	6,700	6,700	6,100	0	600
Trade, transportation, and utilities	318,800	318,300	317,000	500	1,800
Wholesale trade	77,100	77,200	76,200	-100	900
Merchant wholesalers, durable goods	34,100	34,100	33,700	0	400
Merchant wholesalers, nondurable goods	31,900	32,000	31,900	-100	0
Electronic markets and agents and brokers	11,100	11,100	10,600	0	500
Retail trade	186,700	186,200	185,500	500	1,200
Motor vehicle and parts dealers	26,900	26,800	26,700	100	200
Building material and garden supply stores	13,900	14,900	14,800	-1,000	-900
Food and beverage stores	36,900	36,800	37,400	100	-500
Gasoline stations	10,800	10,700	11,000	100	-200
Clothing and clothing accessories stores	16,200	15,700	15,000	500	1,200
Sporting goods, hobby, book and music stores	9,300	9,700	9,600	-400	-300
General merchandise stores	33,600	33,500	35,300	100	-1,700
Miscellaneous store retailers	11,500	11,500	11,500	0	0
Nonstore retailers	6,800	6,600	5,700	200	1,100
Transportation, warehousing, and utilities	55,000	54,900	55,300	100	-300
Utilities	5,300	5,400	5,200	-100	100
Transportation and warehousing	49,700	49,500	50,100	200	-400
Air transportation	4,400	4,200	4,600	200	-200
Truck transportation	17,300	17,800	18,000	-500	-700
Couriers and messengers	6,500	6,400	6,400	100	100
Warehousing and storage	7,700	7,200	7,600	500	100

Oregon Current Labor Force and Industry Employment

	August 2004	July 2004	August 2003	Change From July 2004	Change From August 2003
Information	32,900	32,900	33,800	0	-900
Publishing industries, except internet	13,600	13,600	14,200	0	-600
Newspaper, book, and directory publishers	6,600	6,600	7,100	0	-500
Software publishers	7,000	7,000	7,100	0	-100
Telecommunications	9,500	9,400	9,200	100	300
Financial activities	100,000	99,700	99,700	300	300
Finance and insurance	61,400	61,500	60,400	-100	1,000
Credit intermediation and related activities	31,100	31,000	30,000	100	1,100
Insurance carriers and related activities	25,000	25,100	25,600	-100	-600
Real estate and rental and leasing	38,600	38,200	39,300	400	-700
Real estate	29,800	29,600	31,200	200	-1,400
Professional and business services	182,500	180,100	173,600	2,400	8,900
Professional and technical services	62,600	62,100	60,200	500	2,400
Legal services	12,200	12,300	11,700	-100	500
Architectural and engineering services	12,100	12,100	11,900	0	200
Computer systems design and related services	8,200	8,100	8,000	100	200
Management of companies and enterprises	26,600	26,700	25,500	-100	1,100
Administrative and waste services	93,300	91,300	87,900	2,000	5,400
Administrative and support services	88,000	85,900	83,300	2,100	4,700
Employment services	39,800	38,100	38,000	1,700	1,800
Business support services	14,600	14,700	12,400	-100	2,200
Services to buildings and dwellings	20,800	20,400	18,600	400	2,200
Educational and health services	187,300	187,300	183,700	0	3,600
Educational services	19,400	20,600	20,700	-1,200	-1,300
Health care and social assistance	167,900	166,700	163,000	1,200	4,900
Ambulatory health care services	59,000	58,600	55,800	400	3,200
Hospitals	48,100	48,000	47,500	100	600
Nursing and residential care facilities	37,100	37,200	36,000	-100	1,100
Social assistance	23,700	22,900	23,700	800	0
Leisure and hospitality	164,400	163,700	158,400	700	6,000
Arts, entertainment, and recreation	21,600	21,600	20,500	0	1,100
Amusement, gambling, and recreation	16,600	16,800	15,500	-200	1,100
Accommodation and food services	142,800	142,100	137,900	700	4,900
Accommodation	26,700	26,200	24,100	500	2,600
Food services and drinking places	116,100	115,900	113,800	200	2,300
Full-service restaurants	55,100	55,200	55,100	-100	0
Limited-service eating places	48,600	48,700	47,300	-100	1,300
Other services	58,000	58,300	57,400	-300	600
Repair and maintenance	16,500	16,700	16,500	-200	0
Personal and laundry services	12,700	12,600	11,700	100	1,000
Membership associations and organizations	28,800	29,000	29,200	-200	-400
Religious organizations	15,900	15,900	16,000	0	-100
Government	248,900	250,600	245,000	-1,700	3,900
Federal government	31,900	32,200	32,100	-300	-200
State government	58,600	58,900	57,400	-300	1,200
State education	22,100	22,700	21,900	-600	200
Local government	158,400	159,500	155,500	-1,100	2,900
Indian tribal	7,800	7,800	7,300	0	500
Local education	75,700	76,600	73,700	-900	2,000
Labor-management disputes	0	0	100	0	-100

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 and is adjusted for multiple job-holding and commuting. Unemployment rate is derived by dividing unemployed by civilian labor force.

Nonfarm Payroll Employment: Data 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.

The national Labor Market Information Forum will be held at the Embassy Suites in Portland, Oregon, October 25-27, 2004. If you're an economic researcher, workforce planner or economic development practitioner, remember to mark your calendar for this premier event! Featured speakers will include James Galbraith, speaking on how paradigms shape policy and analysis, and Joseph Cortright, speaking on data analysis for economic development.



The LMI Forum is organized by the LMI Training Institute and co-hosted by the Oregon Employment Department and Washington Employment Security Department. For forum information and registration, visit www.lmi-net.org/LMIForum/2004.html.



OREGON LABOR TRENDS

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