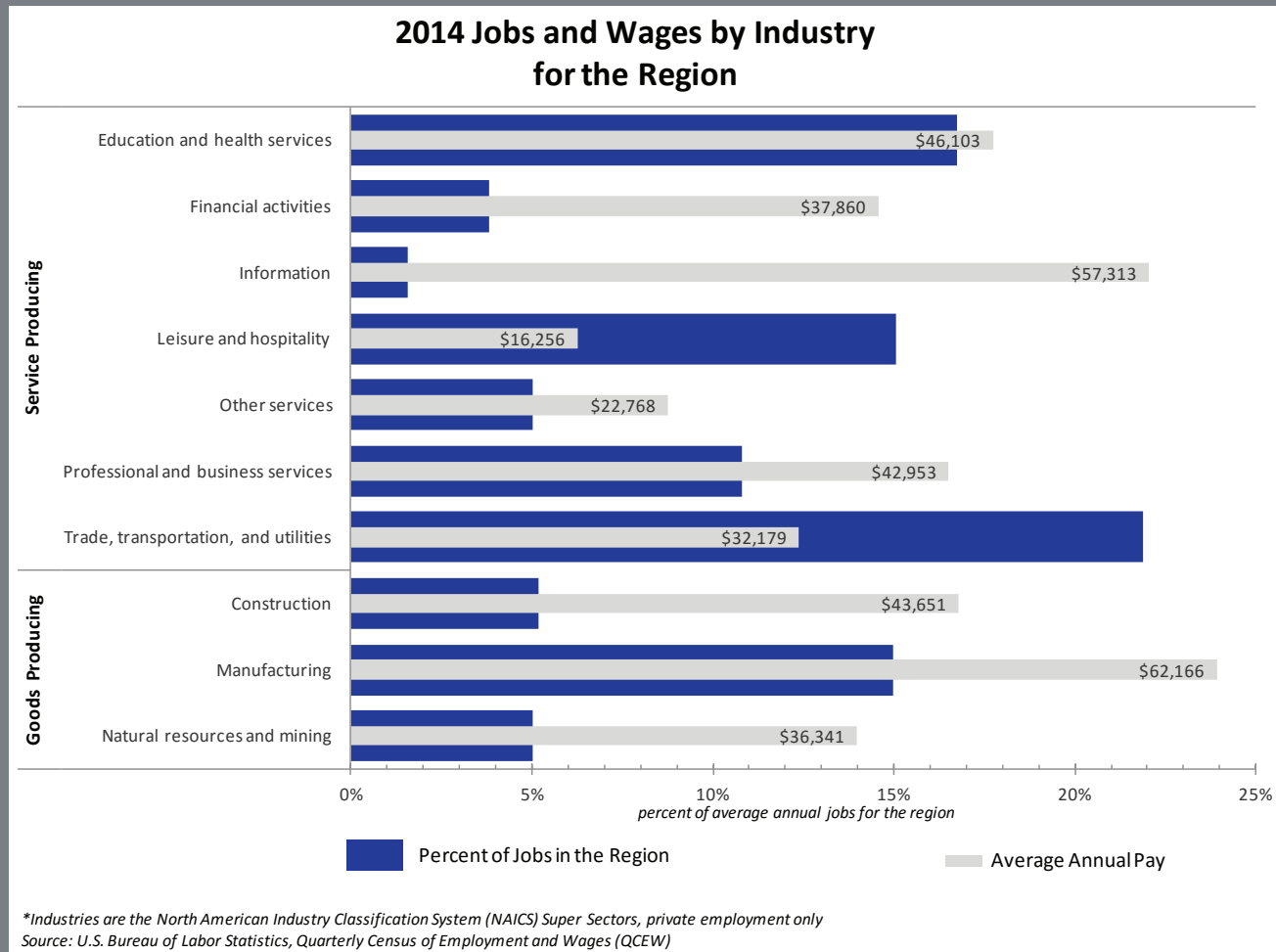


SECTION 4: WORKFORCE, JOBS, AND INDUSTRIES

The region has a complex job and employment base with varied levels of skills and educational attainment that may or may not reflect the needs of current and emerging industries. The types of jobs in the region have changed over the past few decades, with a robust timber industry (see chart on page 57) being replaced with service and professional jobs. According to the Bureau of Labor Statistics (BLS), the highest-paying jobs are in the manufacturing and information sectors.

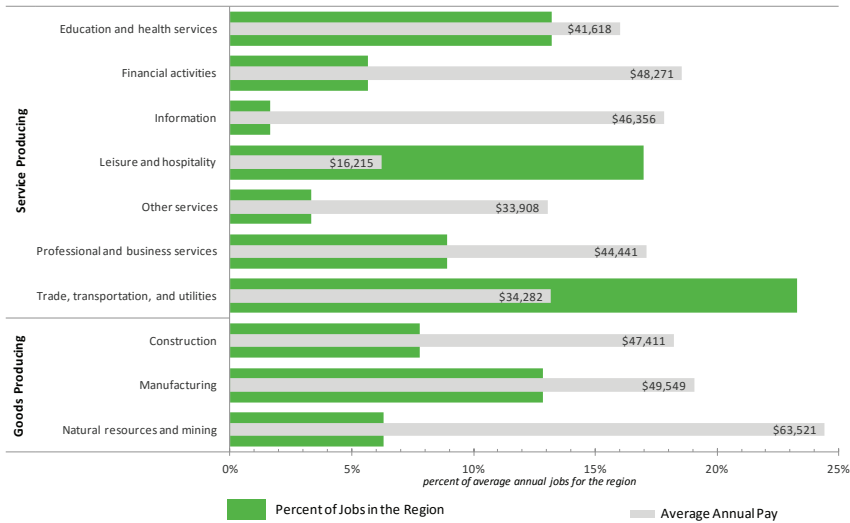


A review of the North American Industry Classification System (NAICS) top-level private-sector industry data for the region shows that the service-producing industries employ the most people, with an average annual wage of \$33,829. The top category by number of jobs -- Trade, Transportation, and Utilities -- includes all retail trade, wholesale trade, transportation, and warehousing. The highest average annual pay, however, is in manufacturing (\$61,166), which accounts for 7.5 percent of the jobs in the region.

Peer Regions Jobs and Wages

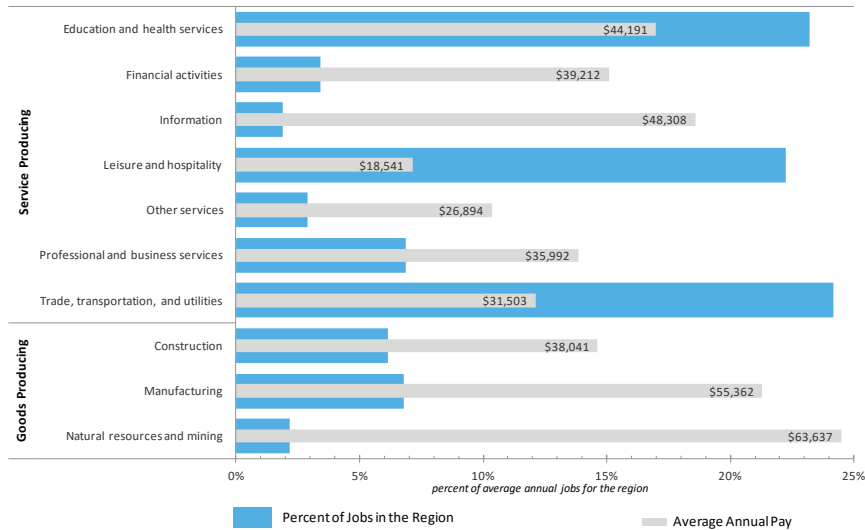
The retail trade industry employs a large number of people, making the Trade, Transportation, and Utilities industry the largest employment category among all regions. However, looking further at the distribution of employment and wages among our peer regions begins to reveal structural differences in employment among our region's peers.

2014 Jobs and Wages by Industry for the BVCOG Region



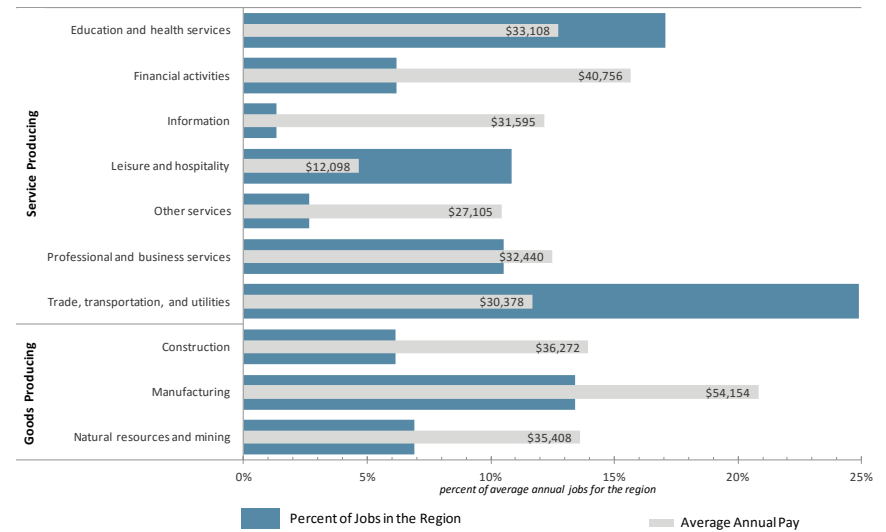
*Industries are the North American Industry Classification System (NAICS) Super Sectors, private employment only
Source: U.S. Bureau of Labor Statistics, Quarterly Census of Employment and Wages (QCEW)

2014 Jobs and Wages by Industry for the NACOG Region



*Industries are the North American Industry Classification System (NAICS) Super Sectors, private employment only
Source: U.S. Bureau of Labor Statistics, Quarterly Census of Employment and Wages (QCEW)

2014 Jobs and Wages by Industry for the SICOG Region



*Industries are the North American Industry Classification System (NAICS) Super Sectors, private employment only
Source: U.S. Bureau of Labor Statistics, Quarterly Census of Employment and Wages (QCEW)

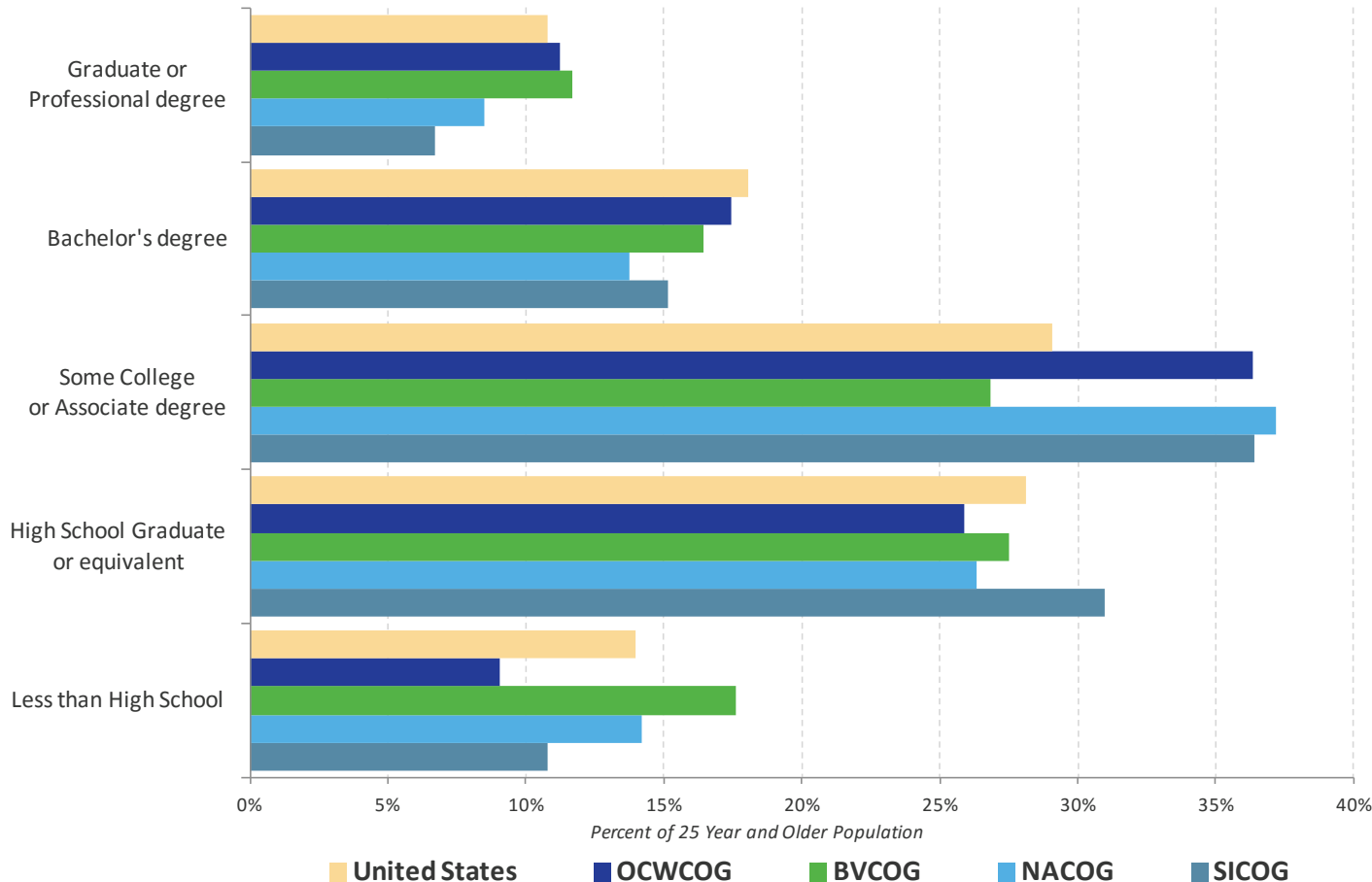


A breakdown of jobs and wages by Industry for each County in the region is available at www.StateoftheRegion.org.

Educational Attainment

Our region is ahead of the peer regions and slightly lower than the national average for the percentage of the population age 25 and older that has a Bachelor's degree. We are closely aligned with the nation in terms of the percentage that has a Bachelor's degree or higher at 29 percent.

Educational Attainment in the United States and Peer Regions
for the Population Age 25 and Over



Source: U.S. Census, 2013 American Community Survey 5-year Estimates

Our region, along with Northern Arizona (NACOG) and Southeast Idaho (SICOG), is estimated to have a high proportion of adults, over 35 percent, with some college or an Associate's degree, when compared with the national average.

Refer to page 37 for high school graduation rates in the region.

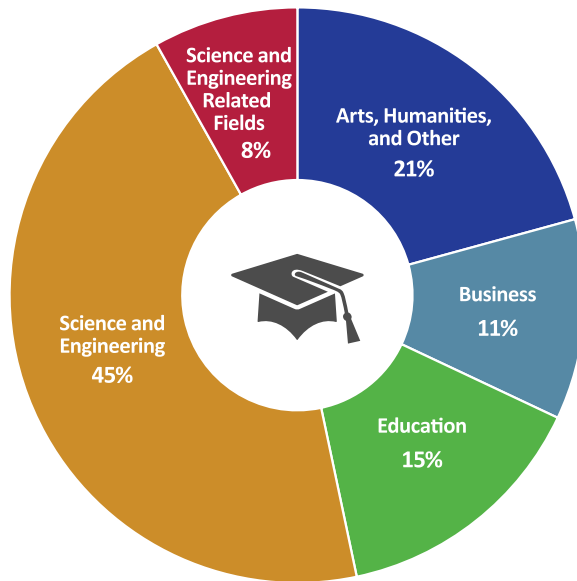


Learn more about the top programs at Linn Benton Community College, Oregon Coast Community College, and Oregon State University by the number of graduates, as well as additional information about the educational attainment of people moving into the region from outside Oregon at www.StateoftheRegion.org.

Bachelor's Degree Fields

The U.S. Census Bureau estimates that 45 percent of the Bachelor's degrees held by residents of our region are in the Science and Engineering field. When combined with Science and Engineering Related fields, the percentage jumps to over 50 percent.

Field of Bachelor's Degrees* for Residents in the Region age 25 and Older



*Tally of all reported Bachelor's Degrees earned which includes persons with multiple degrees
Source: U.S. Census Bureau, 2013 American Community Survey 5-Year Estimates

Employment by Education Level

The majority of entry level positions in the region, or 63 percent, do not require an education level above a high school diploma. However, when looking at non-entry level jobs, or competitive level jobs, less than half of those have a minimum educational requirement of a high school diploma. Most competitive level jobs require at least some post-secondary education and 30 percent require a Bachelor's degree or higher.

Employment by Typical Entry-Level Education, 2012 Region

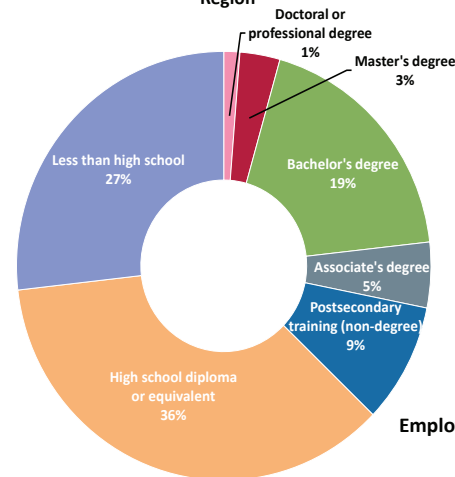


Figure from Oregon Employment Department, Workforce and Economic Research

Employment by Typical Competitive-Level Education, 2012 Region

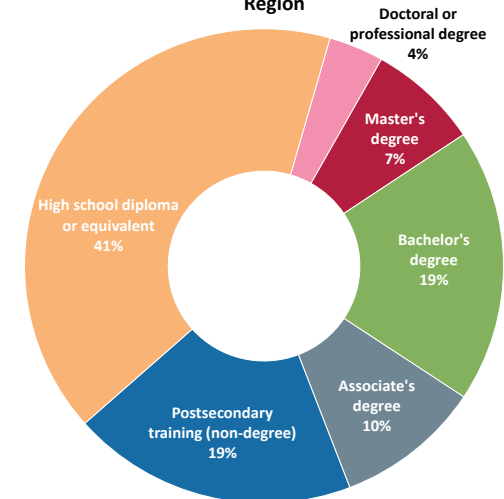


Figure from Oregon Employment Department, Workforce and Economic Research

Projections for Wages

The Oregon Employment Department has issued projections that predict wage and employment by occupation for residents in our region. The highest wage jobs will grow in the Professional and Related sector. See page 27 for details on expected job openings.

Employment by Broad Occupational Group, 2012 and 2022 Region

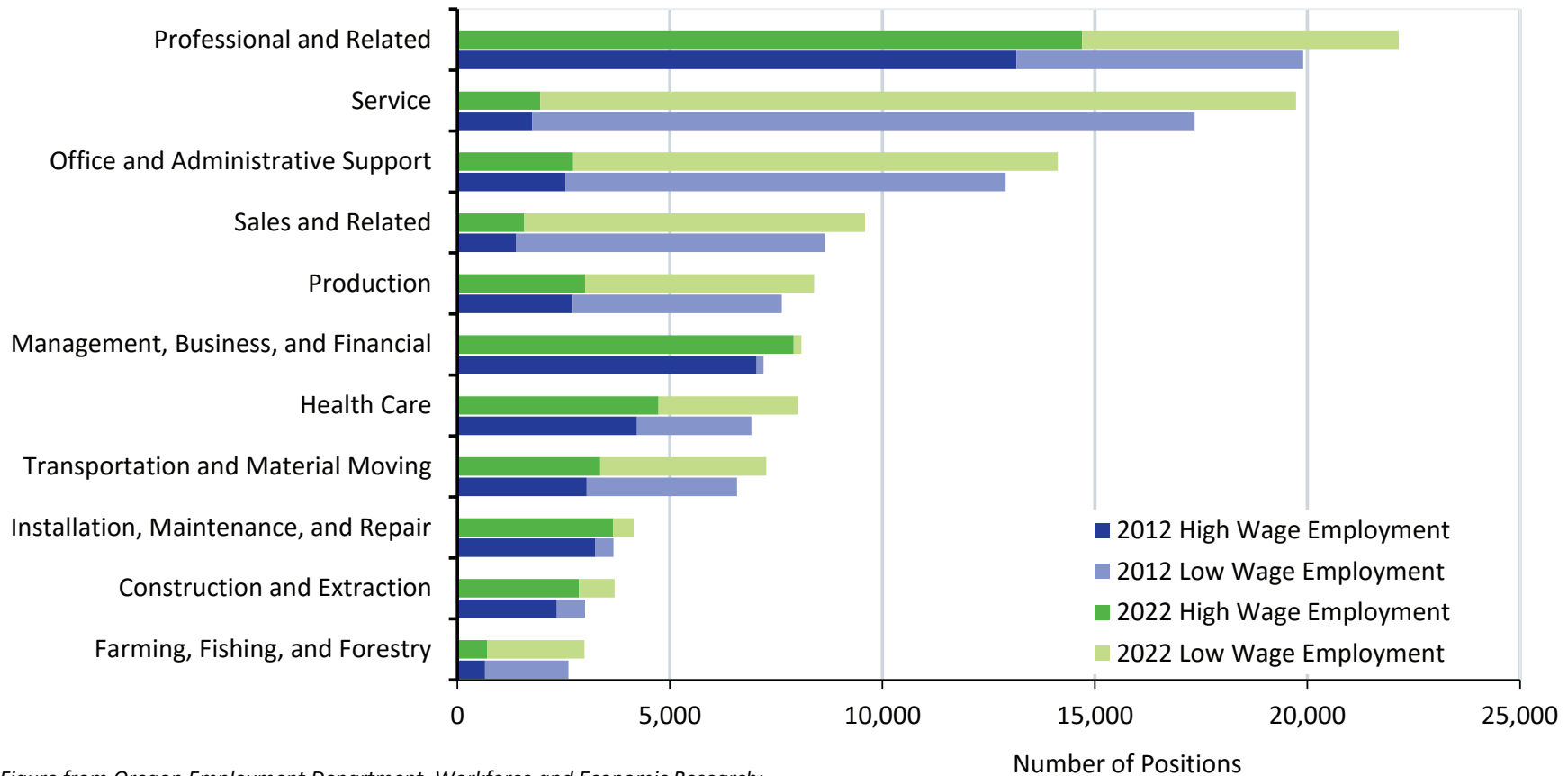


Figure from Oregon Employment Department, Workforce and Economic Research;
High wage is defined as paying more than the 2013 region median of \$16.45/hr

Types of Projected Job Openings

Job openings occur from new job creation and people leaving the workforce. The Oregon Employment Department projects that the majority of job openings that will occur from 2012 to 2022 will be in service occupations. These occupations include protective service (firefighters, law enforcement, security guards, construction flaggers, etc.); food preparation and service; building and grounds cleaning and maintenance; and personal care and service (entertainment attendants, funeral service, personal appearance, child care workers, etc.). In the chart below, the dark blue (replacement openings) represents job openings between 2012 and 2022 that are due to people leaving the workforce due to change in occupation, retirement, or other reasons. The light blue (growth openings) represents the new positions expected to emerge during that time.

Projected Occupational Openings, 2012 - 2022 Region

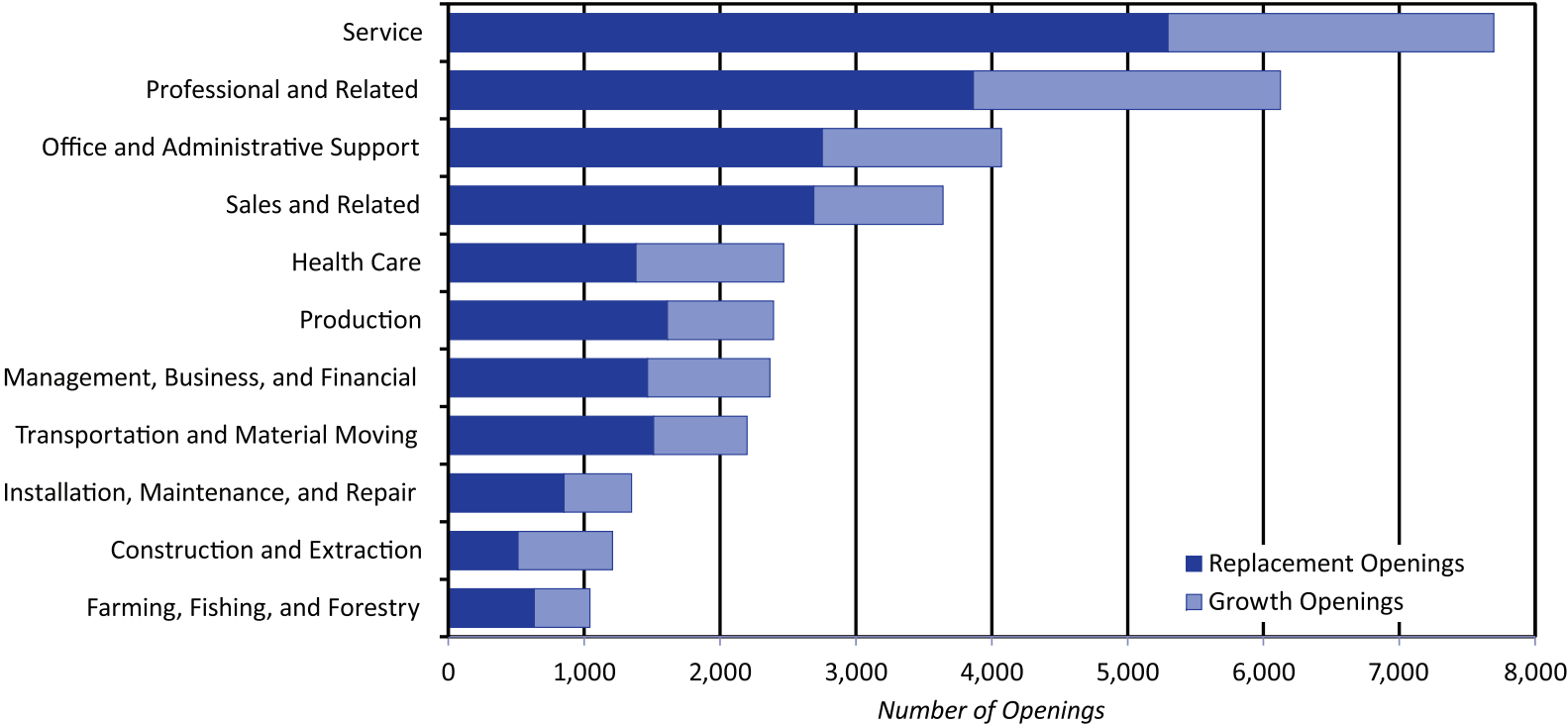
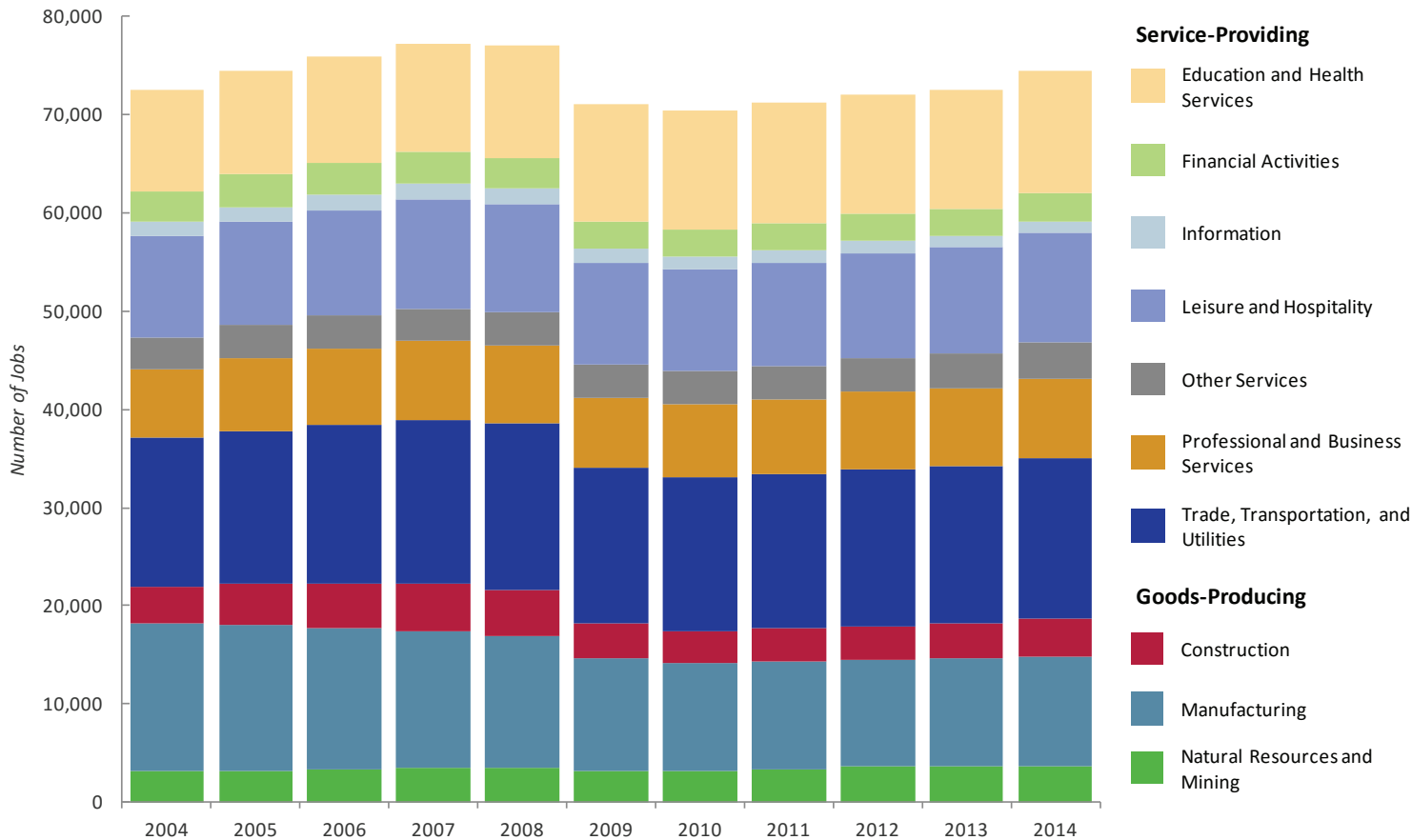


Figure from Employment Department, Workforce and Economic Research;
Source: Oregon Employment Department, Workforce and Economic Research

Jobs by Industry

According to data from the U.S. BLS, the number of jobs in the region declined during the recession and is close to recovering to pre-recession levels. In 2007 and 2008, the annual average number of non-government jobs in the region was slightly more than 77,000. In 2014, the average number of jobs was about 74,000. Seventy-five percent of jobs in 2014 were in service-providing industries, with the majority of jobs falling into the Trade, Transportation, and Utilities industry. This includes retail jobs such as those typically found in restaurants and retail centers.

**Number of Jobs by Industry in the Region
2004 to 2014**



Annual average employment by major private industry
Source: U.S. Bureau of Labor Statistics, Quarterly Census of Employment and Wages (QCEW)

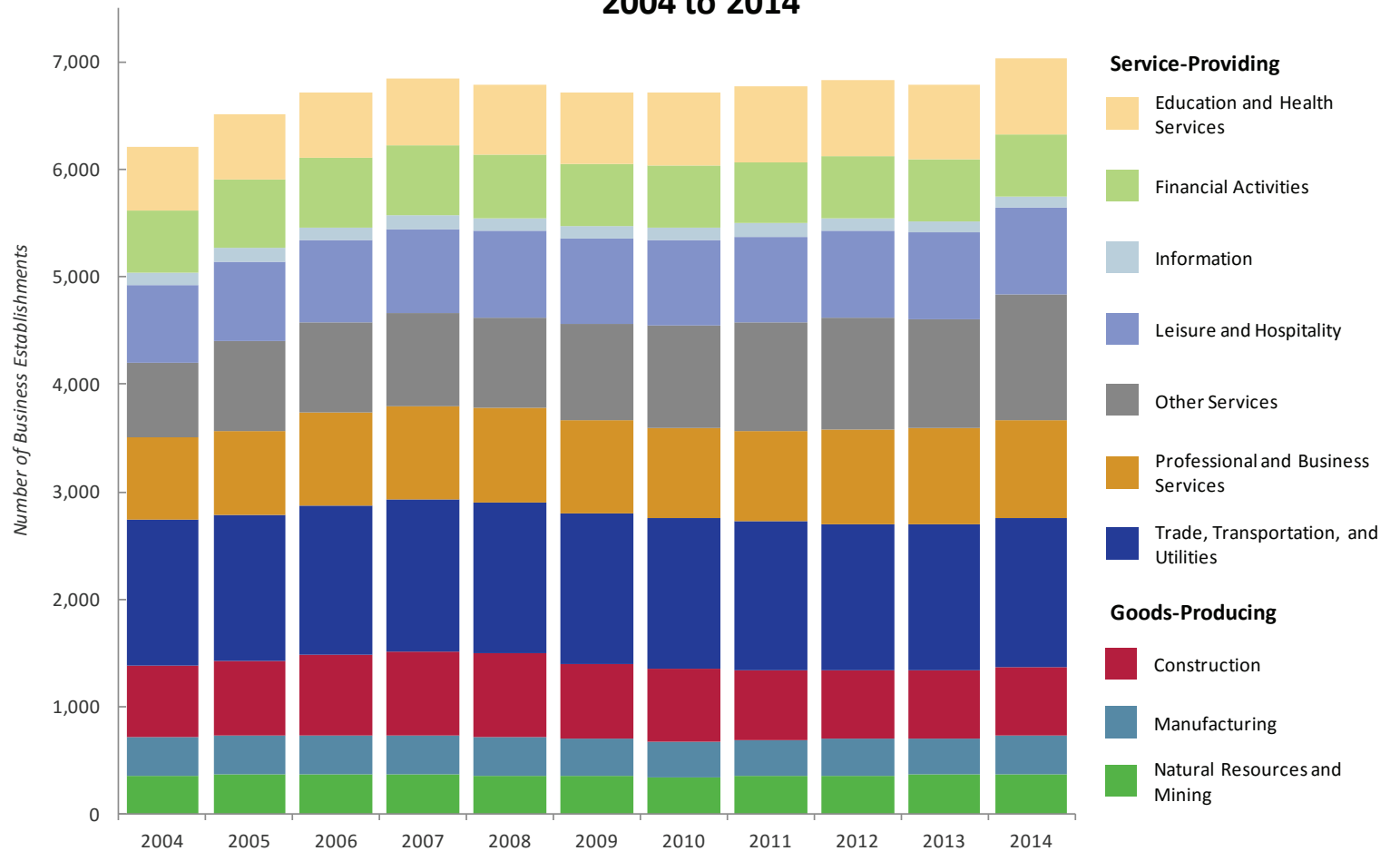
Healthcare Employment

According to a 2013 Health Workforce Needs Assessment by the Workforce Investment Board, the healthcare industry accounts for 11 percent of the workforce in Benton County, nine percent in Lincoln County, and seven percent in Linn County. According to a 2013 survey of healthcare employers in the region as part of the assessment, respondents expected growth in the next five years in support positions, such as nursing aides, secretaries, and billing personnel. Employers also expected higher demand for registered nurses. The results of the survey mirror predictive data from the OED.

Business by Industry

Data from the U.S. BLS show that since 2004, the number of business establishments in the region has increased by over 13 percent. There were 7,040 establishments in 2014, more than the highest pre-recession annual average of 6,879 in 2007. Service-providing industries have the most establishments, 80 percent, with the Trade, Transportation, and Utilities industry making up the majority of businesses.

Number of Businesses by Industry in the Region 2004 to 2014

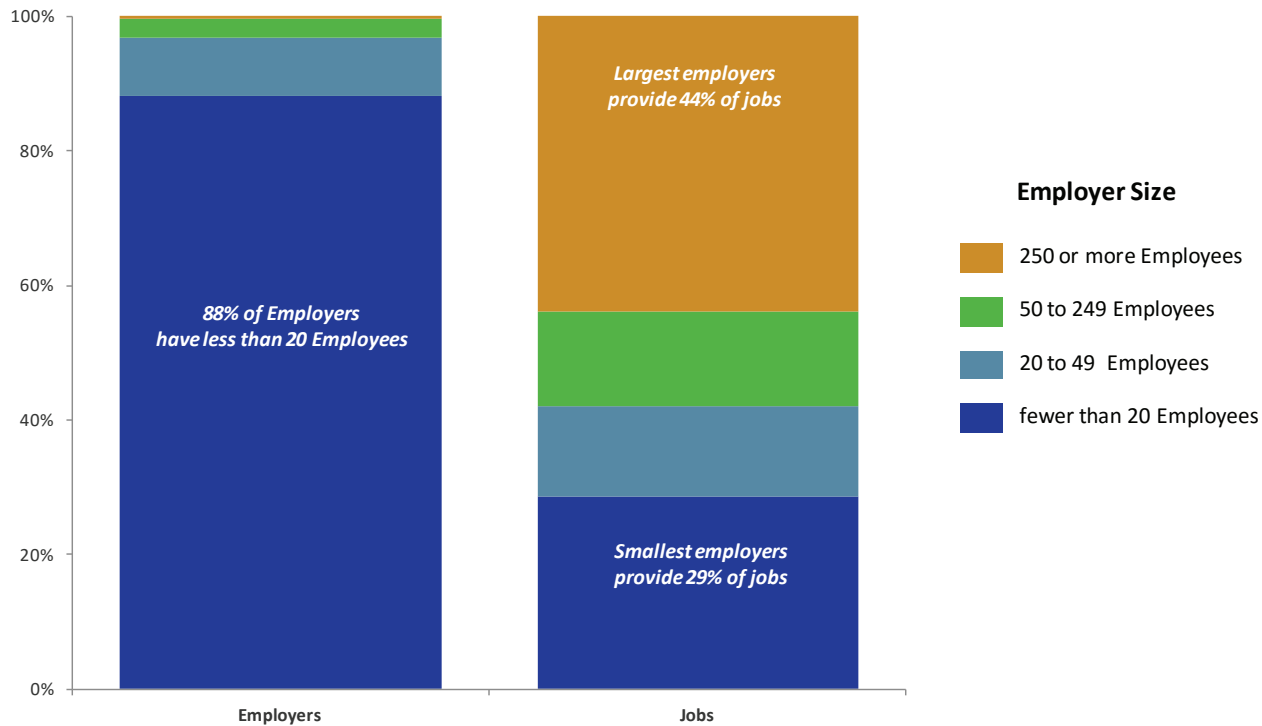


Annual average number of establishments by major private industry
Source: U.S. Bureau of Labor Statistics, Quarterly Census of Employment and Wages (QCEW)

Employer Size

Large employers in the region, those with 250 or more employees, make up less than one percent of all employers. However, these large employers provide 44 percent of the jobs in the region. The smallest employers, those with fewer than 20 employees, represent 88 percent of all employers and provide almost 30 percent of the jobs in the region.

2013 Total Employers and Jobs by Employment Size for the Region



Employer	Employees (Jobs)	County
Oregon State University	10,022	Benton
Samaritan Health Services (formerly Good Samaritan Hospital)	2,697	Benton
Samaritan Health Services	1,600	Linn
Hewlett Packard	1,525	Benton
Confederated Tribes of Siletz Indians	1,127	Lincoln
Linn Benton Community College	1,100	Linn
Greater Albany Public Schools	1,080	Linn
Wah Chang	949	Linn
Samaritan Health Services	800	Lincoln
Target	631	Linn

Sources:
 Albany-Millersburg Economic Development Corp, December 2013
 Economic Development Alliance of Lincoln County, 2012
 City of Corvallis, 2014

NOTE: Data include Private Employers only, does not include Government Employers
 Sources: U.S. Census Bureau, 2013 County Business Patterns and 2013 Quarterly Workforce Indicators (QWI) Data, Longitudal-Employer Household Dynamics Program (www.vrdc.cornell.edu/qwipu)