


State of Oregon
Employment
Department

Low Income Employment and Housing Implications

September 2018
Washington County Commissioners

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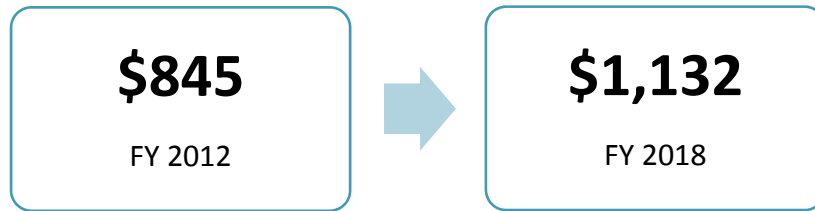


Annual Average Wages in Portland Increased 8% in 5 Years

| | | |
|-------------------------|---|-------------------------|
| \$54,200 2012 | → | \$58,687 2017 |
|-------------------------|---|-------------------------|

Inflation adjusted
Source: Oregon Employment Department, Quarterly Census of Employment and Wages (QCEW), 2012, 2017 annual for Portland MSA

But Fair Market Rents for 1-Bedrooms Increased 34%

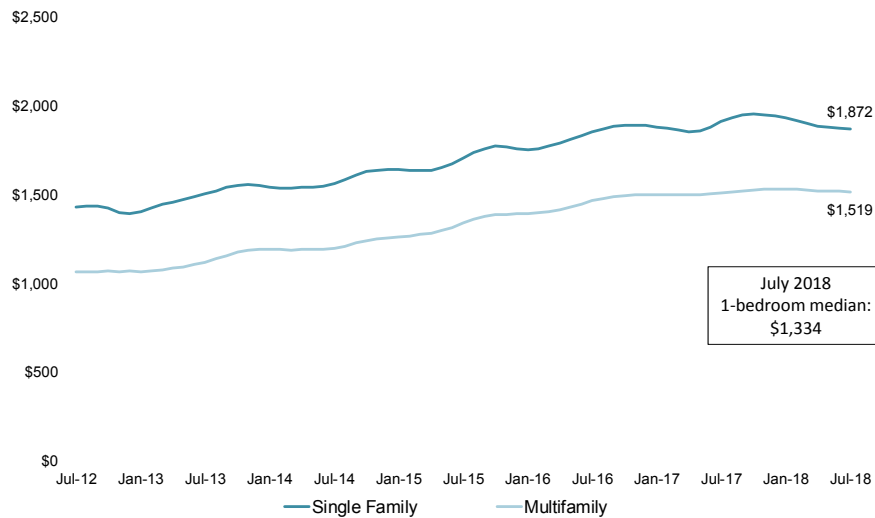


Those making less than \$40,752/year are considered rent-burdened (\$19.50/hr full-time; Portland median is \$21.70/hr)

Inflation adjusted
Source: HUD Fair Market Rents for Portland MSA, Fiscal Years 2012, 2018, 1-bedroom



Median Rents Stabilizing in 2018

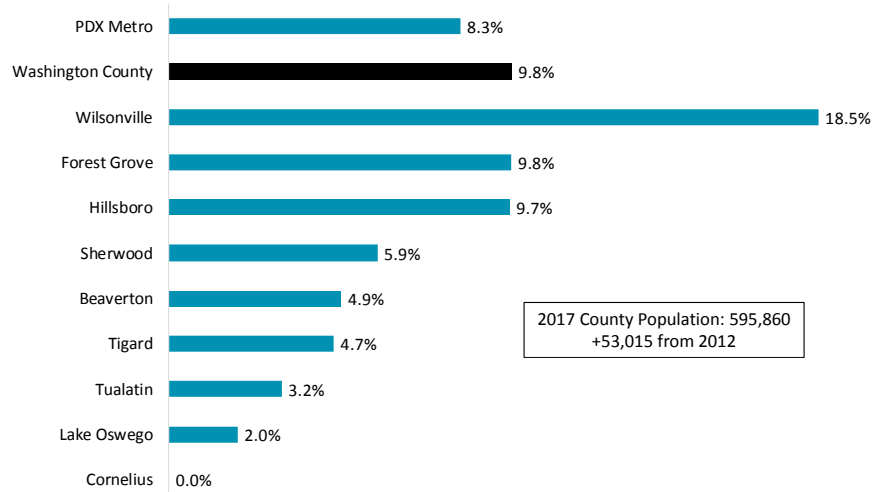


Source: Zillow Rent Index (ZRI), July 2012 to July 2018 for Washington County

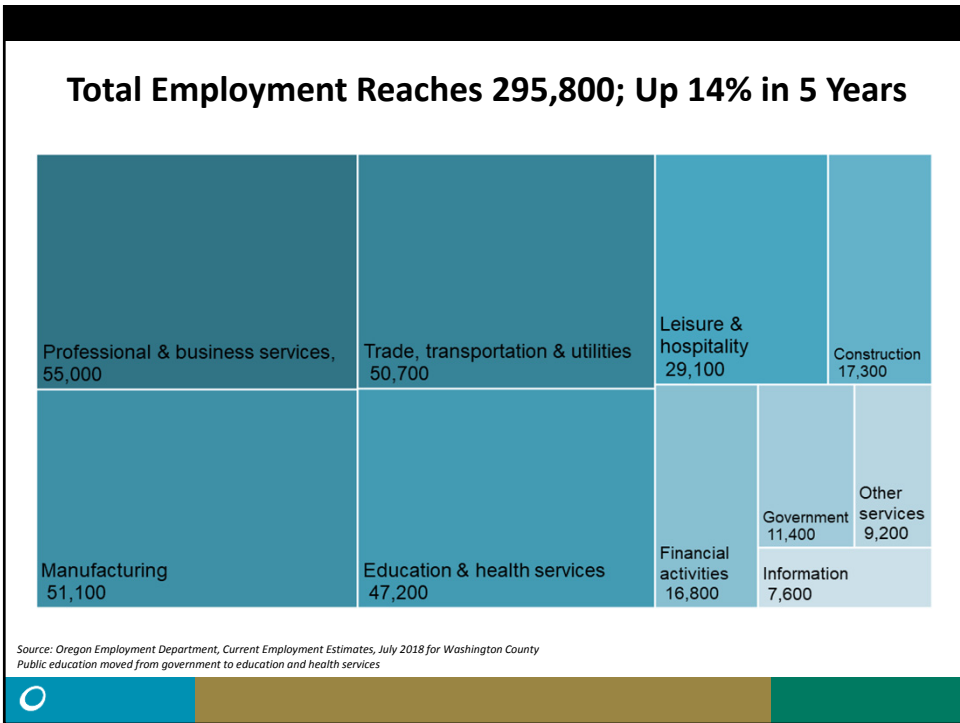
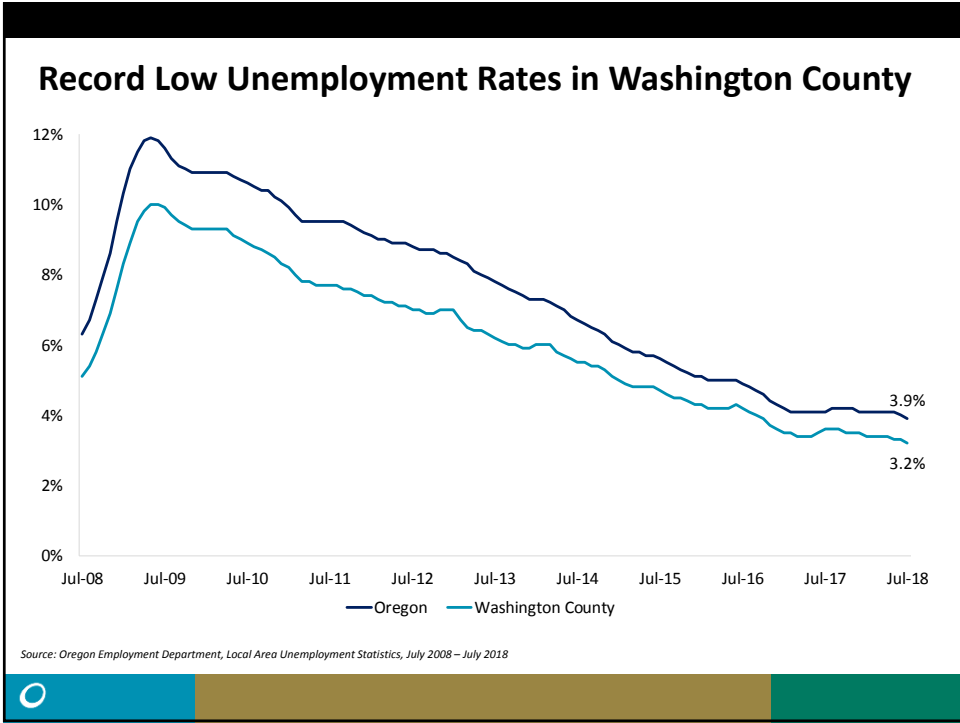


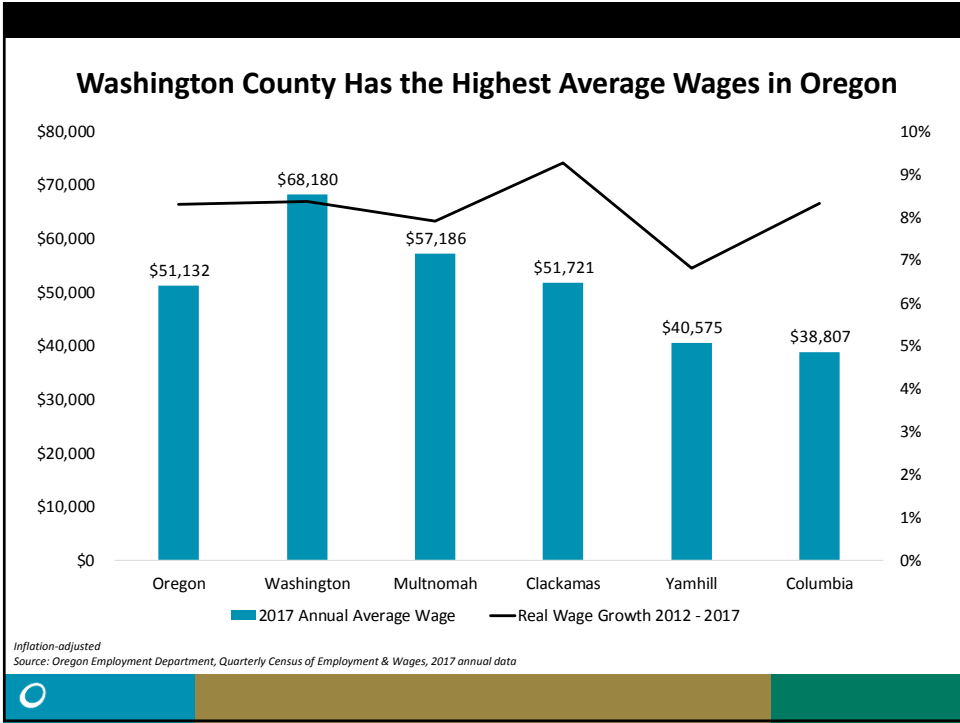
WASHINGTON COUNTY ECONOMY

Wilsonville Leads Population Growth Over the Past 5 Years



Source: Portland State University Population Research Center, 2012-2017. Estimates as of July 1st.





LOW INCOME EMPLOYMENT

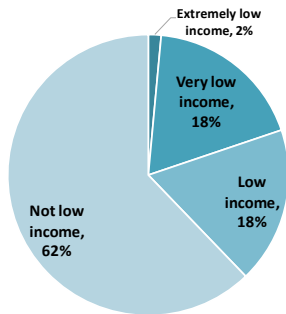
Housing and Urban Development (HUD) Fair Market Limits - 2017

| Portland Metro Income Limit | Individual Annual Income |
|-----------------------------|--------------------------|
| Extremely low income | Less than \$15,700 |
| Very low income | \$15,701 - \$26,150 |
| Low income | \$26,151 - \$41,850 |

Full-time minimum wage as of July 1: \$24,960 for areas inside the UGB;
\$22,360 for areas outside the UGB

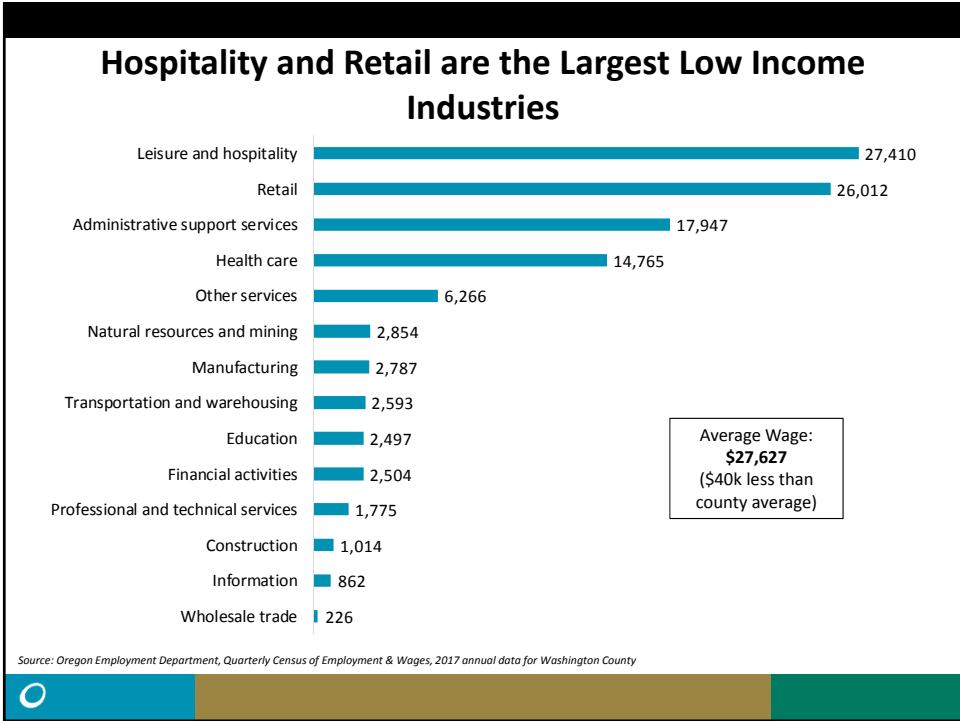
Source: US Department of Housing and Urban Development (HUD) FY 2017

38% of Employment is in Low Income Industries



- 5% decrease in low income employment from 2012
 - From 115,631 to 109,647
- 35% increase in non-low income employment from 2012
 - From 134,013 to 180,396

Source: Oregon Employment Department, Quarterly Census of Employment & Wages, 2017 annual data for Washington County

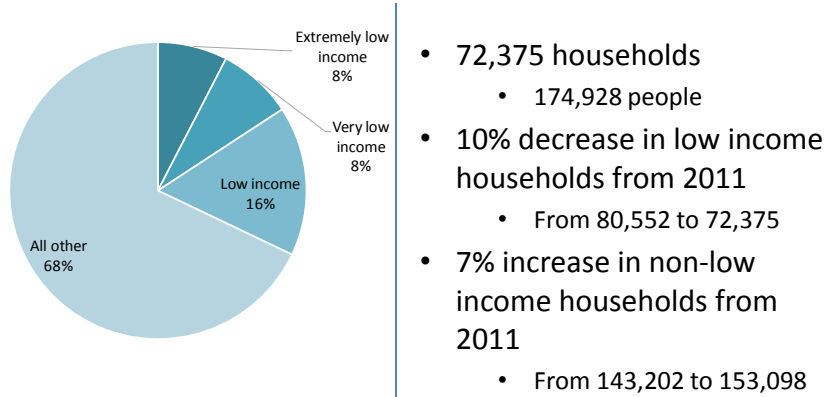


Slower Long-Term Job Growth in Middle-Wage Jobs

| Income Tier | Industry | 2017 Annual Average Wage | Employment Growth 2007-2017 |
|-------------|----------------------------------|--------------------------|-----------------------------|
| High-wage | High tech manufacturing | \$148k | 17% |
| | Professional & business services | \$126k | |
| | Wholesale trade | \$94k | |
| Middle-wage | Construction | \$65k | 8% |
| | Manufacturing (non high-tech) | \$64k | |
| | Government | \$54k | |
| Low-wage | Education (public & private) | \$46k | 14% |
| | Retail | \$33k | |
| | Leisure & hospitality | \$21k | |

Source: Oregon Employment Department, Quarterly Census of Employment and Wages 2007 – 2017; Government excludes public education

32% of Households are Low Income

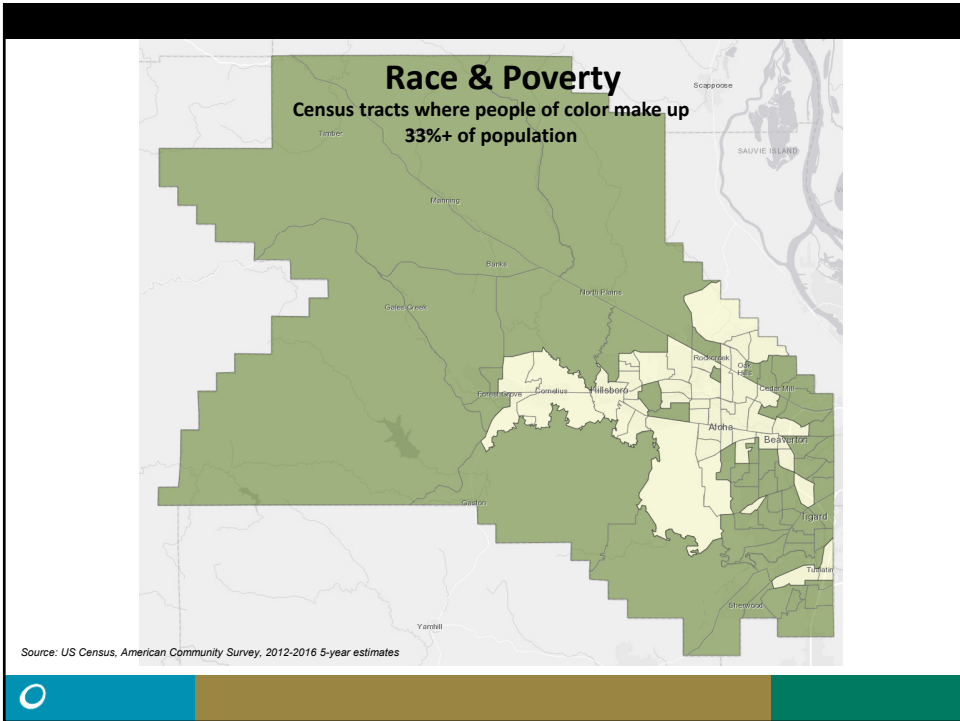
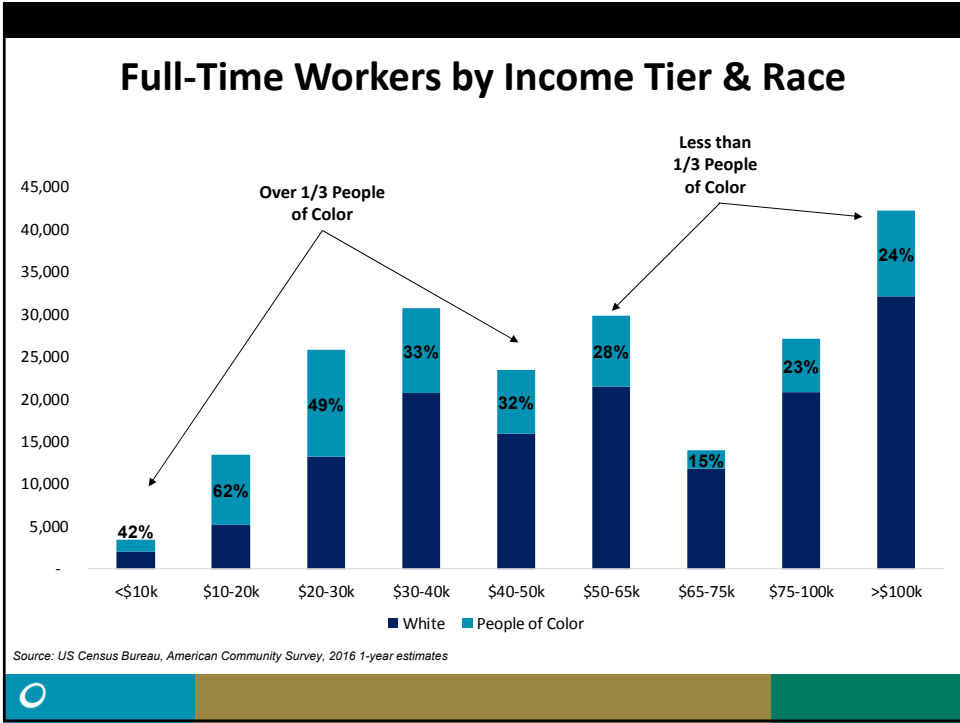


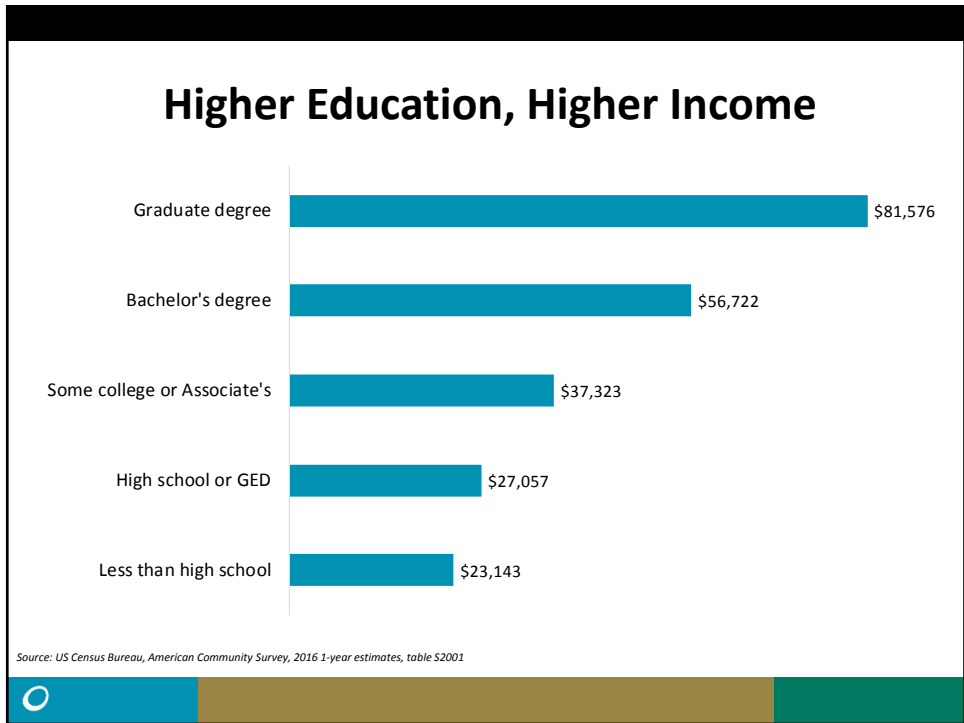
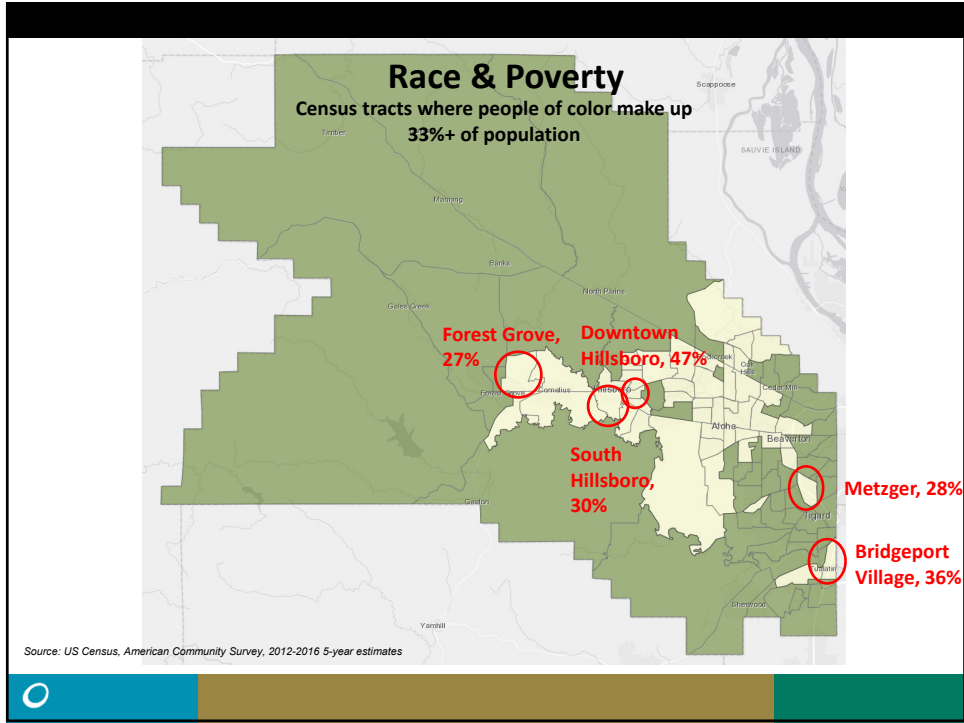
Source: US Census Bureau, American Community Survey Public Use Microdata, 2016 1-year estimates for Washington County

Demographics of Low Income Residents

| Indicator | Low Income Residents | County Average |
|---|----------------------|----------------|
| People of color | 44% | 33% |
| Labor force participation rate | 59% | 69% |
| Unemployment rate | 5.1% | 4.5% |
| Bachelor's or higher (25+) | 22% | 43% |
| Have a disability | 16% | 10% |
| Speak a language other than English at home | 37% | 25% |

Source: US Census Bureau, American Community Survey Public Use Microdata, 2016 1-year estimates for Washington County





OUTLOOK

Polarized Employment Growth Projected to Continue

| Income Tier | Industry | 2017 Annual Average Wage | Projected Growth 2017-2027 |
|-------------|----------------------------------|--------------------------|----------------------------|
| High-wage | High tech manufacturing | \$148k | 15% |
| | Professional & business services | \$126k | |
| | Wholesale trade | \$94k | |
| Middle-wage | Construction | \$65k | 9% |
| | Manufacturing (non high-tech) | \$64k | |
| | Government | \$54k | |
| Low-wage | Education (public & private) | \$46k | 12% |
| | Retail | \$33k | |
| | Leisure & hospitality | \$21k | |

Source: Oregon Employment Department, Industry Employment Forecast, 2017-2027, Portland Tri-County

Many Job Openings Projected for All Income Tiers

- 13% job growth from 2017 to 2027
- 1.3 mil total openings
- Most total openings:
 - Retail sales (50,048, \$31k)
 - Cashiers (41,645, \$29k)
 - Waiters & waitresses (37,755, \$31k)
 - Food prep & serving (37,551, \$27k)
- Fastest growth:
 - Home health aides (+36%, \$28k)
 - Postsecondary health specialties teachers (+32%, \$155k)
 - Software developers (+31%, \$108k)
 - Medical assistants (+30%, \$40k)

Source: Oregon Employment Department, Occupational Employment Projections, 2017-2027, Portland Tri-County; Oregon Wage Information, 2018 annual average wages



Questions?

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