

Oregon Environmental Scan

Prepared for the Oregon Library Association Vision 2010 Committee

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OLA 2010 Project External Scan - *Executive Summary*

Purpose of This Study

The external scan is designed to provide library planners with information about the environment in Oregon within which libraries operate. This scan will include information, projections and trends related to the economy, politics, education, demographics, social issues, and so on. Data from this scan and the other scans to be conducted will form the foundation of the Oregon Library Association's new strategic plan. Vision 2010 should provide a description of those changes likely to impact libraries in the state and a prescription for making the most effective use of emerging technologies.

Demographics

How Oregon Will Grow

During the next thirty years (1995-2025), Oregon will move from the 29th most populous state to the 26th most populous. During this time, the state will gain 1.2 million people, the 15th largest growth rate in the country, at 38 percent.

Where Growth Will Come From

1. International migration (migration into Oregon from outside the United States) will account for 197,000 additional people, the 19th largest international migration rate in the country.
2. Net internal migration (the number of people moving into Oregon from another state minus Oregonians moving out to another state) will bring 712,000 new people into the state, the 8th largest internal increase.
3. Natural increase (births minus deaths) will account for another 200,000 people, ranking Oregon the 15th largest.

Growth Rate is Slowing

1. The growth rate has slowed to just 1% in the last year (July 1998-July 1999), the smallest increase in a decade. Analysts hypothesize that this slowdown is caused by the resurgence of the California economy, the impact of the Asian economic crisis on Oregon's high tech industries, and an unemployment rate that is the fourth highest in the nation.
2. Metropolitan counties are still growing at an average 1.8% annually, while non-metropolitan and rural areas are experiencing slower rates of growth.

Population is Aging

Oregon will be like all other states and see a decline in the proportion of youth in its population.

1. As Boomers (born between 1946 and 1964) reach retirement age, the growth of the elderly population (65 and over) will accelerate rapidly. In Oregon, the proportion of elderly is projected to increase from 13.6 percent in 1995 to 24.2 percent in 2025. Among the states, Oregon's proportion of elderly will move from 17th highest to 4th highest.
2. Oregon's "dependency rate" (the number of youth and elderly for every 100 people of working age) could rise from 71.4 in 1995 to 90 in 2025. This increase will move Oregon from 25th largest to 10th largest.

Hispanic Population Growing Fastest

Oregon's Hispanic population will be the fastest growing. In 1995, Hispanics made up 4.8 percent of Oregon's population. By 2025, Hispanics will comprise 9.8 percent, an increase of slightly more than 100 percent.

1. The state will see slower growth from other groups: non-Hispanic Whites will move from being 89.5 percent of the population in 1995, to making up 82 percent of the population in 2025. This is a reduction of about 9 percent.
2. Non-Hispanic Asians and Pacific Islands will increase from 2.8 percent of the state's population to 4.7 percent, an increase of 68 percent.
3. The African-American population will see slower growth, also. This group will move from being 1.7 percent of the population in 1995, to being 2 percent in 2025, an increase of 18 percent.

Population Growth Varies by Region

4. American Indian, Eskimo, and Aleut will grow from 1.3 percent in 1995 to 1.5 percent in 2025, an increase of 15 percent.

While trend information is not available, current variations might be useful to note:

Population growth has not been shared equally among all regions of the state: counties in Central Oregon had extremely high rates of growth (27.3 percent), as did those along the I5 corridor (11.4 percent); during the same time (between 1990 and 1996), Northwest Oregon and Eastern Oregon had relatively low population growth (7.6 percent).

Best Jobs, Highest Education Level in Portland Metro/Willamette Valley Regions

1. Thirty-four percent of adults in the Portland Metro area have a Bachelor's degree or higher as compared to 18 percent in Eastern Oregon. Most of the businesses and industries that require such an education are concentrated in the Willamette Valley.
2. The employment rate is highest in the Northwest, Portland Metro area and Willamette Valley, at over 70 percent. The lowest rate is in the swath of counties running from west to east in the lower half of the state (65 percent).
3. Between 1989 and 1995, the median household income in the state rose 30 percent. However, almost all of this increase occurred in the Northwest and Portland Metro area. Elsewhere the median household income has remained significantly lower than the state average.

Hispanics in Oregon

1. The Hispanic population in Oregon grew 66% between 1990 and 1997, while the state's overall population grew only 13%.
2. Oregon's Hispanic population is estimated to grow 5% more by 2000 and an additional 6% by 2005.
3. There has been an increase of 170% since 1990 in the Hispanic labor force in Oregon, from 49,000 to 132,000, while the overall labor force grew 16%.
4. Per capita personal income (PCPI) in 1989 for Hispanics was \$6,996; all Oregonians' PCPI was \$13,418.

At the county level, the percentage of Hispanics in 1990 varied from 1.2 percent in Wheeler County to 20.3 percent in Malheur County. In 1993, Wheeler continued to have the lowest

Older Oregonians

percentage of Hispanics, and Malheur the highest. The largest increases of Hispanic population from 1990 to 1993 were in Multnomah, Washington, Marion, Umatilla, and Malheur counties.

Although overall, Oregon residents who are 55 year of age or older comprise 21.6 % of the population, the elderly comprise varying percentages within each race. Approximately 22 percent of Whites are ages 55 and older; this figure is roughly twice that of any minority group. For every minority group but Hispanics, about one in eight persons are age 55 and older. Among Hispanics, only one in 14 persons is elderly [defined as 55 and older by this report].

Economic/Employment/Business Issues

Slower Rates of Job Growth

Total non-farm employment is projected to grow by 287,300 jobs by 2008, substantially less than the 403,800 jobs added during the ten years prior to 1998. This is a growth rate of 18.2 percent over the next ten years, nearly 2 percent per year. Most new jobs will come in the service-producing sector of the economy, like wholesale and retail trade (72,500), services (127,500), and government (27,800). Other sectors such as construction (11,900) and manufacturing (21,000) will grow also, but at a slower rate.

Why Job Growth is Slowing

Population growth is slowing, which impacts job growth rate. As California's economy has recovered, fewer Californian's have moved to Oregon. Oregon's economy has also been impacted by the Asian economic crisis

Fastest Growing Jobs

Professional and technical occupations will have the fastest growth rate, with managerial, clerical, agricultural/forestry/fishing and blue-collar jobs growing at a rate below the state average. Clerical jobs are projected to grow at the slowest rate, only about one percent a year. Analysts conjecture that this is a result of computerization, with more work places requiring employees to perform at least some of their own clerical work. Service and sales occupations will make up a larger share of the growth than they do of the 1998 employment mix

Largest Number of Jobs

By contrast, the largest number of jobs is projected to be in the retail sales occupation, with cashiers coming in second. A few occupations made both the top ten growth rate list and the top ten most jobs list: computer support specialist, computer engineer, and personal and home care aides.

High Wage Jobs Will Increase Slightly

Will the new jobs being added fall in the high wage or low wage categories? The share of new jobs in the average-wage category is slated to remain about the same at 19 percent. In 1998, 53 percent of jobs in Oregon fell in the lower-wage category. By 2008, this segment is projected to fall somewhat, to 49 percent. Higher wage jobs will increase from their present 25 percent to 28 percent.

Job Growth is Not Distributed Evenly

An important caveat about job growth: Oregon's regional economies vary dramatically and the distribution of jobs reflects this diversity. For example, nearly 80 percent of the 400,000 jobs added in the past decade were added in the Portland-metro area or the Willamette Valley. Many rural areas have seen relatively stagnant population and job growth, often compounded by losses of high-wage jobs in the lumber and wood products industry.

Small Business is Key to Oregon Economy

In 1997, Oregon had 97,147 businesses with employees; 97.8 percent of the businesses were small businesses (fewer than 500 employees). In addition to the number of employer businesses, the state also had 175,000 self-employed persons in 1997. From 1992 to 1996, small businesses created 98.5 percent of the job growth in the state.

Political/Economic Issues

Booming Economy Masks Experiences of Many

The strong economy of the late 1990s lifted the fortunes of most, but not all, Oregon workers. Low-wage workers in Oregon have benefited from the highest minimum wages in the nation and relatively tight labor markets throughout much of the state. Affluent Oregonians experienced substantial gains in the stock market and had steady income growth. Middle income working Oregonians, however, largely have been left out of the prosperity the economy has generated. Median incomes of middle-income workers have only recently returned to levels from the late 1980s. The real median income of the typical Oregon household is just 3 percentage points in 1995-96 above the 1989-91 level.

Tax Cuts and Kicker Don't Benefit Middle Class

The middle class (not to mention those who have even less) loses out when it comes to income tax cuts and the benefit of the "kicker" refund, also. "Oregon's 'kicker' refund and a tax cut proposal referred to the November, 2000, ballot will result in large windfalls for the affluent, leave little for workers in the middle, and damage the capacity of the state to carry out needed education, workforce programs, and economic development that can lift the incomes, wages, and benefits of middle income Oregonians," according to the Oregon Center for Public Policy.

Income Gaps Are Widening

Nationally, the after-tax income gaps between those with the highest income and others has widened substantially since 1977 and is projected to reach its widest point in recent decades in 1999.

1. In Oregon, the richest 20 percent of families with children had average incomes over 10 times as large as the poorest 20 percent of families.
2. Between the late 1970s and the mid-1990s, average income of both poor and middle income families declined (by 27 percent and 13 percent, respectively) while that of the richest families increased by nearly 15 percent [figures adjusted for inflation].
3. The gap between the top fifth of families and the bottom fifth of families increased between the mid-1980s and the mid-1990s faster in Oregon than in all but 15 states.

Number of Labor Surplus Areas in Oregon Growing

For the third year in a row, the number of "labor surplus areas" has grown in Oregon. The federal Department of Labor publishes a list of counties and cites whose unemployment rate has remained well above national averages for two years. The number of labor surplus areas in Oregon has grown from 16 in October, 1996, to 27 in October, 1999. Tillamook and Columbia counties were added in October, 1999 and Sherman County was removed. Most of rural Oregon is now represented on this list, underscoring again the disparity between economies in the state.

Oregon's State Government Ill-prepared for Recession

1. Oregon was one of the 11 states found to fall short in available reserves by more than 20 percent of fiscal year 1999 expenditures, based on an estimated requirement of more than 25% of General Fund expenditures. Oregon's projected shortfall is 29 percent, second only to Idaho's (33 percent). The study computed the level of reserves each state would need to weather the hypothetical next recession without either cutting spending or raising taxes.
2. Forty-five states have budget stabilization or "rainy day" funds. Oregon is one of five states that does not.
3. Oregon is one of eight states that has reduced its general fund revenues by 5 percent or more through tax cuts since 1993.

Social Issues

Hunger

1. Despite claiming the best economy in the nation, Oregon is the state with the highest percentage (6.8 percent) of hungry households in the country. The U. S. Department of Agriculture defines "hungry" as meaning "one or more household members were hungry at least some time during the year due to inadequate resources of food."
2. In terms of "basic food insecurity" (defined as "[a household] did not always have access to enough food to meet basic needs.") Oregon ranked fifth, at 16.8 percent.
3. Additional research is needed, according to USDA officials. They do theorize, however, that the anomaly seen in Oregon is caused by a combination of high housing costs, lack of family support structure, foul-up's in the food stamp program, and the lack of community nutrition

Is Welfare Reform Working?

programs. Local observers also note that the overall boom in the Northwest's economy hasn't been felt in most rural areas.

Job placements and average starting wages seem to be falling off for those trying to move off welfare under the state's JOBS Program. Nearly one third of placements are in part time jobs that don't pay enough to move families out of poverty.

Less than 7 percent of single parent families on public assistance had any earnings from employment.

The state's efforts to establish paternity have fallen off 15 percent from the previous year.

Prisons and Youth Correctional Facilities

While the general population of the state is projected to grow only slightly more than 1 percent a year, Oregon's prison population will grow by 59 percent in just the next ten years. About half of the total growth is directly or indirectly related to the passage of Ballot Measure 11., which mandates minimum sentences for any of 21 violent crimes.

Juvenile custody forecasts only project out five years. Between 1999 and 2003, the total custody population is expected to increase by 16 percent.

Health Issues

According to the Centers for Disease Control's Behavior Risk Survey, Oregonians are doing better than residents of other states in terms of activity levels and use of seatbelts, are about average in terms of weight and smoking, and higher than the other states in terms of hypertension and chronic drinking. Thirteen percent of Oregonians were found to have no health insurance.

The Oregon Population Survey found in 1996 that 90 percent of Oregonians had basic health insurance. Again, however, the variation between the Portland Metro area and the rural parts of

Digital Divide in Oregon

the state are marked: over twice as many rural Oregonians were without health insurance than those in the Portland Metro area.

The percent of Oregonians receiving employer-based health insurance coverage declined over the course of the 1990s, according to the Oregon Center for Public Policy.

Household Composition has Changed

While just over half of Oregon households own a computer (51 percent), households in the Portland Metro area and the Willamette Valley owned far more than those elsewhere in the state (as low as 32 percent in Eastern Oregon).

One-fourth of all Oregonians live alone. The percentage was highest in the Portland Metro area (27%) and lowest in Central Oregon (21 percent). There is a direct correlation between percentage of elderly and size of household.

Education in Oregon

Oregon Highlights from the *1999 National Education Goals Report*

Oregon placed among the highest-performing states in seven measure areas. Notable among them is:

1. Ready to Learn (only 5 percentage of infants born with low birth weight, which impedes ability to learn)
2. International standing in 8th grade science achievement (only Singapore outperformed Oregon)
3. Percentage of degrees earned by minority students that were awarded in mathematics and science (50%)
4. Percentage of U.S. citizens who reported that they registered to vote (76%)
5. Percentage of U.S. citizens who reported that they voted (64%)

Oregon's performance declined in four areas:

1. High school completion rate among 18-24 year-olds decreased from 89% in 1990 to 75% in 1997.
2. The percentage of high school graduates who immediately enrolled in college in any state decreased from 54% in 1992, to 52% in 1996.
3. The percentage of public secondary teachers who reported that student disruptions interfered with their teaching increased from 37% in 1991, to 57% in 1994.
4. The percentage of public school teachers reporting that lack of parental involvement in their schools is a serious problem increased from 19% in 1991, to 30% in 1994.

Critical Information
from *Hispanics in
Oregon's Workforce*

High school drop out rates are higher for Hispanics than for any other group. At the beginning of the 1996-1997 school year, there were 9,484 Hispanic students enrolled in 9th through 12th grades in Oregon public schools. Over the course of the school year, 1,491 students (or one in six students) dropped out of school. The drop out rate for all students was just 6.7 percent (or one in every fifteen students).

OLA 2010 Project External Scan

The external scan is designed to provide library planners with information about the environment in Oregon within which libraries operate. This scan will include information, projections and trends related to the economy, politics, education, demographics, social issues, and so on. Data from this scan and the other scans to be conducted will form the foundation of the Oregon Library Association's new strategic plan. Vision 2010 should provide a description of those changes likely to impact libraries in the state and a prescription for making the most effective use of emerging technologies.

DEMOGRAPHICS

Population and population growth

Oregon's 1995 population is 3.1 million people, making it the 29th most populous state (among the 50 states and District of Columbia, the base for all comparisons). Over the next 30 years, Oregon's rank will move from this level to 26th most populous. Net gain over the next thirty years is projected to rank Oregon as the 15th largest (in terms of gain), at 1.2 million people.

Sources of growth:

1. international migration (migration into Oregon from outside the United States) will account for 197,000 additional people, placing Oregon at 19th largest;
2. net internal migration (those moving into Oregon from another state minus Oregonians moving out to another state) will bring 712,000 new people to the state, a rank of 8th largest; and
3. natural increase (births minus deaths) will account for 200,000 more people, a rank of 15th largest.

Population growth rate:

Population growth rate has slowed. Between July 1998 and July 1999, population growth was just 1%, the smallest increase in a decade. Growth by out-of-state migration fell to less than half of the previous year and a quarter of the early 1990's rate.

Analysts hypothesize that this reduction is a product of the economic slowdown in the state's high-tech industry caused by the Asian economic crisis, the resurgence of California's

economy, and an unemployment rate the fourth highest in the nation.

Metropolitan counties are still growing at an average 1.8-% annually, with greatest growth happening along the I5 corridor. Non-metropolitan areas averaged a 1.5-% annual growth rate, increasing faster than the US average of 1%. While eight rural counties experience no population change in this year's time, the trend is still counter to the significant losses experienced by rural counties elsewhere in the country. Of Oregon's counties, only Coos experience a population loss during this one-year time period.

The Oregonian, November 18, 1999, Page A1.

Age groups

1. All states and the District of Columbia are projected to show a decline in the proportion of youth (under 20 years of age)
2. The percentage of Oregon's population classified as youth is projected to decline from 28.1% in 1995 to 23.1% in 2025. Among the states, Oregon's rank is 34th largest in 1995 and 45th largest in proportion of youth in 2025.
3. As Boomers (those born between 1946 and 1964) reach retirement age, the growth of the elderly population (65 and over) is expected to accelerate rapidly, in all states. The proportion of Oregon's population classified as elderly is projected to increase from 13.6% in 1995 to 24.2% in 2025.

Among the states, Oregon's proportion will move from 17th highest to 4th highest.

4. Oregon's "dependency rate" (the number of youth and elderly for every 100 people of working age) could rise from 71.4 in 1995 to 90 in 2025. This increase will move Oregon from 25th largest to 10th largest.

Race and Ethnic Makeup

1. By 2025, non-Hispanic Whites will comprise 82% of Oregon's population, down from 89.5% in 1995. This is a reduction of about 9%.
2. Fastest growing will be the Hispanic population (4.8% of the population in 1995 to 9.8 % in 2025, an increase of slightly more than 100%).
3. Non-Hispanic Asians and Pacific Islanders will increase from 2.8% of the state's population to 4.7%, an increase of 68%.
4. Slower growth will come from the African-American population (2% in 2025, up from 1.7% in 1995, an increase of 18%) and American Indian, Eskimo, and Aleut (1.3% in 1995 and 1.5% in 2025, an increase of 15%)
5. The numeric change in Oregon's non-Hispanic White population from 1995 to 2025 ranks as the 7th largest gain among the states.
6. The numeric change in the population of Hispanics ranks as the 16th largest gain.

7. While the number is small (26,000), the rank of increase in the population of American Indian, Eskimo, and Aleut is projected to be the 10th largest.

U.S. Bureau of the Census. Population Division. *State population rankings summary*. Population Paper Listing #47, Population Electronic Product #45. [Online]. Available www.census.gov/population/projections/state/9525rank/orprsel.txt

Hispanics in Oregon

1. Latino population in Oregon grew 66% between 1990 and 1997, while state's overall population grew only 13%.
2. Oregon's Hispanic population is estimated to grow 5% more by 2000 and an additional 6% by 2005.
3. There has been an increase of 170% since 1990 in the Hispanic labor force in Oregon, from 49,000 to 132,000, while the overall labor force grew 16%.
4. In 1997, 7.6 percent of the Oregon labor force was Hispanic, while almost 11 percent of the unemployed were Hispanic.
5. Oregon's Hispanic high school drop out rate was 15.7 percent during the 1996-1997 school year, while the all-student drop out rate was 6.7 percent.
6. In 1990, one in five employed Latinos worked in farming, forestry, and fishing occupations, with four-fifths of the workforce employed in other occupations. Since then, Hispanic employment in farm-related occupations has

increased by two-thirds, while employment outside the farm sector has tripled.

7. Four industries clearly dominated Latino employment in 1997: manufacturing, trade, agriculture, and services.
8. Per capita personal income (PCPI) in 1989 for Hispanics was \$6,996; all Oregonians' PCPI was \$13,418.
9. At the county level, the percentage of Hispanics in 1990 varied from 1.2 percent in Wheeler County to 20.3 percent in Malheur County. In 1993, Wheeler continued to have the lowest percentage of Hispanics, and Malheur the highest. The largest increases of Hispanic population from 1990 to 1993 were in Multnomah, Washington, Marion, Umatilla, and Malheur counties.
10. High school drop out rates are higher for Hispanics than for any other group. At the beginning of the 1996-1997 school year, there were 9,484 Hispanic students enrolled in 9th through 12th grades in Oregon public schools. Over the course of the school year, 1,491 students (or one in six students) dropped out of school. The drop out rate for all students was just 6.7 percent (or one in every fifteen students).
11. For all Oregonians, per capita personal income in 1989 was \$13,418, compared with \$6,996 for Hispanics.

Source: Oregon. Oregon Employment Department. *Hispanics in Oregon's Workforce*. 1998.

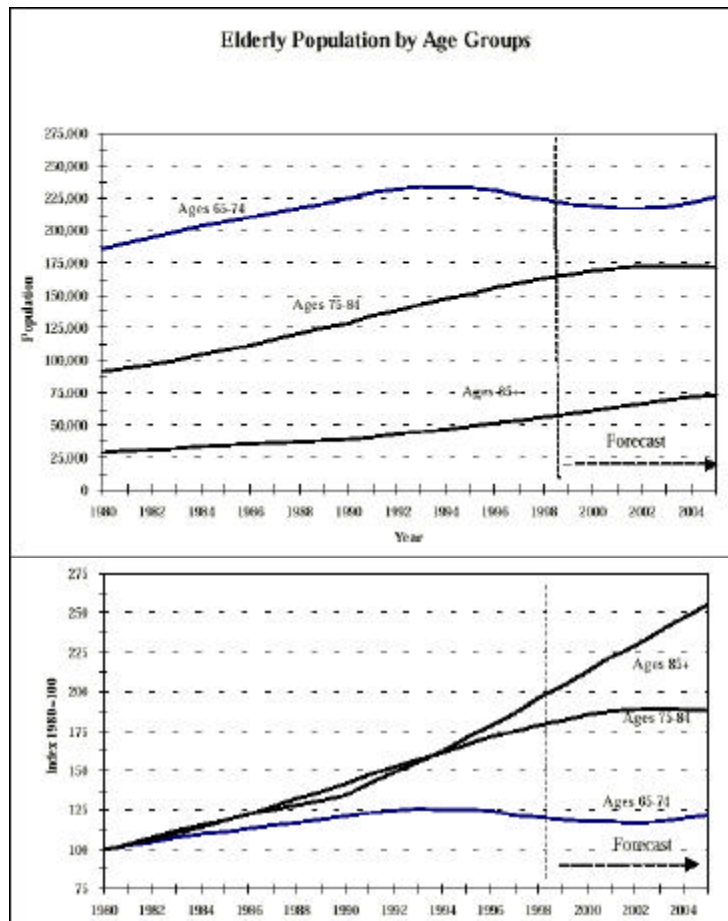
Multnomah County's Commission on Children and Families' "Take the Time" campaign identified 40 assets for youth to succeed. The 1997 Latino and Latina Youth Survey found that

many of the essential things that our Latino youth need to be successful are missing. For example:

- **Reading for pleasure** (young people enjoy reading on their own for at least 3 hours per week) was 19% compared to 33% for Caucasian students.

Gender and Age

The ratio of men to women will remain basically the same, at approximately 49% men to 51% women. Projections by age will show some interesting variations in pattern:



Source: Oregon. Office of Economic Analysis. *Economic and Revenue Forecast for State of Oregon. Population Forecasts by Age and Sex - Appendix C.* December, 1999.

Older Oregonians

A Portrait of Older Oregonians, 1997, published by the Institute on Aging, College of Urban and Public Affairs, Portland State University, contains a wealth of information. There's trend data, everything you could think of about older Oregonians. Here's an interesting factoid:

- Although overall, Oregon residents who are 55 year of age or older comprise 21.6 % of the population, the elderly comprise varying percentages within each race. Approximately 22 percent of Whites are ages 55 and older; this figure is roughly twice that of any minority group. For every minority group but Hispanics, about one in eight persons are age 55 and older. Among Hispanics, only one in 14 persons is elderly [defined as 55 and older by this report].

Source: Portland State University. College of Urban and Public Affairs. Institute on Aging. *A Portrait of Older Oregonians.* 1997.

Regional Variations in Demographics

While trend information is not available, current variations might be useful to note:

1. Population growth has not been shared equally among all regions of the state: counties in central Oregon had extremely high rates of growth (27.3 percent), as did those along the I5 corridor (11.4 percent); during the same time (between 1990 and 1996), Northwest Oregon and Eastern Oregon had relatively low population growth (7.6 percent).
2. Home values have increased in the high population growth areas, making home ownership less and less affordable. In the Portland Metro area, for example, home ownership is now about 65 percent, while home ownership in Eastern Oregon is 76 percent. The media value of a home in Eastern Oregon is 57 percent of a home in the Portland Metro area (\$140,000 as compared to \$80,000).
3. Thirty-four percent of adults in the Portland Metro area have a Bachelor's degree or higher as compared to 18 percent in Eastern Oregon. Most of the businesses and industries that require such an education are concentrated in the Willamette Valley.
4. The employment rate is highest in the Northwest, Portland Metro area and Willamette Valley, at over 70 percent. The lowest rate is in the swath of counties running from west to east in the lower half of the state (65 percent).
5. Between 1989 and 1995, the median household income in the state rose 30 percent. However, almost all of this increase occurred in the Northwest and Portland Metro

area. Elsewhere the median household income has remained significantly lower than the state average.

6. While just over half of Oregon households own a computer (51 percent), households in the Portland Metro area and the Willamette Valley owned far more than those elsewhere in the state (as low as 32 percent in Eastern Oregon).
7. The Oregon Population Survey found in 1996 that 90 percent of Oregonians had basic health insurance. Again, however, the variation between the Portland Metro area and the rural parts of the state are marked: over twice as many rural Oregonians were without health insurance than those in the Portland Metro area.
8. One-fourth of all Oregonians live alone. The percentage was highest in the Portland Metro area (27%) and lowest in Central Oregon (21 percent). There is a direct correlation between percentage of elderly and size of household.

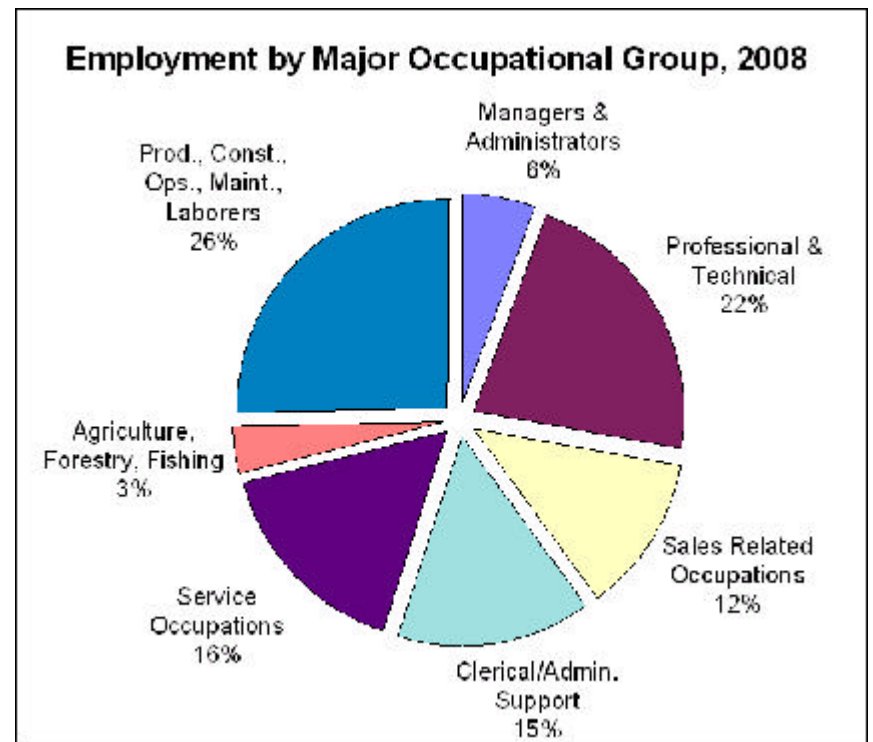
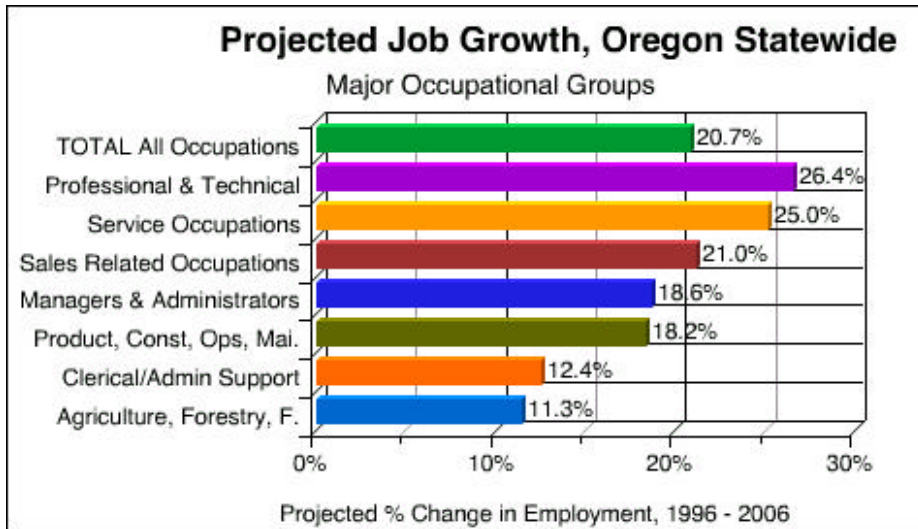
Source: Oregon. . Office of Economic Analysis. Department of Administrative Services. *Oregon Update: Regional Variations - A Summary of Findings from the 1996 Oregon Population Survey*. October, 1997.

ECONOMIC/EMPLOYMENT/BUSINESS ISSUES

Total non-farm employment is projected to grow by 287,300 jobs by 2008, substantially less than the 403,800 jobs added during the ten years prior to 1998. This is a growth rate of 18.2 percent over the next ten years, nearly 2 percent per year. Most new jobs will come in the service

-producing sector of the economy, like wholesale and retail trade (72,500) , services (127,500), and government (27,800). Other sectors (such as construction [11,900] and manufacturing [21,000] will grow also, but at a slower rate.

agricultural/forestry/fishing and blue-collar jobs growing at a rate below the state average. Clerical jobs are projected to grow at the slowest rate, only about one percent a year. Analysts conjecture that this is a result of computerization, with more work places requiring employees to perform at least some of their own clerical work. Service and sales occupations will make up a larger share of the growth than they do of the 1998 employment mix.



Slower projected population growth is a primary factor behind the forecast for slower job growth, particularly in sectors like construction and trade. The in-migration rate of 1988-1998 was fueled in large part by the weak California economy. That economy has now basically recovered and unemployment rates are now near those in Oregon. As population growth slows, the demand for locally produced goods and services will also grow at a slower rate, impacting job growth.

Professional and technical occupations will have the fastest growth rate, with managerial, clerical,

Examples of fastest growing occupations include computer support specialists (114.5%), personal and home care aides (95.5%), detectives/private investigators (61.6%) and database administrators (53.3%).

By contrast, the largest number of jobs is projected to be in the retail sales occupation, with cashiers coming in second. A few occupations made both the top ten growth rate list and the top ten most jobs list: computer support specialist, computer engineer, and personal and home care aides.

Will the new jobs being added fall in the high wage or low wage categories? The share of new jobs in the average-wage category is slated to remain about the same at 19 percent. In 1998, 53 percent of jobs in Oregon fell in the lower-wage category. By 2008, this segment is projected to fall somewhat, to 49 percent. Higher wage jobs will increase from their present 25 percent to 28 percent.

Source: Oregon. Oregon Employment Department. Oregon Labor Market Information System. *Occupational Projections: Planning for the 21st Century*. [Online] Available <http://olmis.emp.state.or.us/olmisj/OlmisZine?zineid=00000002>

Oregon. Oregon Employment Department. Oregon Labor Market Information System. *Oregon's Long-Term Industry Employment Projections*. September, 1999. [Online] Available http://olmis.emp.state.or.us/olmisj/ArticleReader?itemid=00000499&segmentid=0003&tour=0&p_date=1

An important caveat about job growth: Oregon's regional economies vary dramatically and the distribution of jobs reflects this diversity. For example, nearly 80 percent of the 400,000 jobs added in the past decade were added in the Portland-metro area or the Willamette Valley. Many rural areas have seen relatively stagnant population and job growth, often compounded by losses of high-wage jobs in the lumber and wood products industry.

The Oregon Employment Department report, *Oregon: A State of Diversity*, provides these conclusions:

1. Annual average unemployment rates are generally lower in the Portland-metro area than the rest of the state
2. While all regions have added population and employment (with just a few exceptions), these gains have not kept pace with the Portland-metro area
3. High tech employment is largely located in the most urban regions. Rural areas are more dependent on lumber and wood products jobs and have less diversified economies
4. Across all regions, job growth has been most rapid in non-manufacturing industries, with trade and services accounting for a large percentage of the growth. Only the Portland-metro area and the Willamette Valley regions have added manufacturing jobs in the last decade
5. Income levels are higher in the Portland-metro region than in other regions and the gap between incomes there and elsewhere has widened

Source: Oregon. Oregon Employment Department. Workforce Analysis Unit. Research Section. *Oregon: A State of Diversity*. 1999.

Small Business

In 1997, Oregon had 97,147 businesses with employees; 97.8 percent of the businesses were small businesses (fewer than 500 employees). In addition to the number of employer businesses, the state also had 175,000 self-employed persons in 1997.

From 1992 to 1996, small businesses created 98.5 percent of the job growth in the state.

In 1992, 83.3 percent of the exporters in the state were small businesses.

Between 1987 and 1996, the number of women-owned businesses in the state increased 88.7 percent, to 121,000.

The number of black-owned firms increased 70.6 percent from 1987 to 1992, to 1,447.

The number of Hispanic owned firms increased 121.4 percent during the same time period, to 3,538.

The number of Asian and Pacific Islands, American Indians, and Alaskan Natives owning businesses increased 62.1 percent from 1987 to 1992, to 5,414.

Between 1996 and 1997, the number of new firms increased 1.9 percent, while financial difficulties leading to business bankruptcies increased by 90.9 percent and business failures increased by 41.4 percent.

Source: U.S. Small Business Administration. *Small Business: Heart of the Oregon Economy*. [Online] Available <http://www.sbaonline.sba.gov/ADVO/stats/profiles/98or.html>

POLITICAL/ECONOMIC ISSUES

Middle-income workers in Oregon haven't experienced a fair share of the economic boom in the state.

"The strong economy of the late 1990s lifted the fortunes of most, but not all, Oregon workers. Low-wage workers in Oregon have benefited from the highest minimum wages in the nation and relatively tight labor markets throughout much of the state. Affluent Oregonians experienced substantial gains in the stock market and had steady income growth. Middle income working Oregonians, however, largely have been left out of the prosperity the economy has generated."

Median incomes of middle-income workers have only recently returned to levels from the late 1980s. The real median income of the typical Oregon household is just 3 percentage points in 1995-96 above the 1989-91 level.

More recent trends indicate that middle-income workers continue to lose out:

1. The hourly wages of the middle class have been generally stagnant during the expansion of the 1990s. Real median hourly wages in Oregon went from \$12.01 in 1989 to \$11.16 in 1998, a drop of more than seven percent.
2. Middle class household incomes have risen somewhat but the reason is likely to be that more household members are working and working longer hours. National labor force participation rates and national figures on annual hours worked have risen considerably, supporting this hypothesis.
3. The percent of Oregonians receiving employer-based health insurance coverage declined over the course of the 1990s

The middle class (not to mention those who have even less) loses out when it comes to income tax cuts and the benefit of the "kicker" refund, also. "Oregon's 'kicker' refund and a tax cut proposal referred to the November, 2000, ballot will result in large windfalls for the affluent, leave little for workers in the middle, and damage the capacity of the state to carry out needed education, workforce programs, and economic development that can lift the incomes, wages, and benefits of middle income Oregonians."

Middle income jobs are disappearing in Oregon. The Oregon Employment Department has projected that "... by 2006 the average Oregonian will be more likely to be working in a low-wage job or a high-wage job than they are today [1997], but less likely to be working in a middle-wage job."

Income tax cuts are attractive to many voters, but they will not help the middle income family in Oregon. Declining wages are

pre-tax declines; tax burden does not drive this. Since Oregon's income tax system is basically progressive, middle-income families pay a relatively small portion of total state and federal income taxes collected. Consequently, middle income families receive little benefit from across the board tax breaks.

The 1999 kicker is such an across the board tax refund, equaling 4.57 percent of a taxpayer's 1998 personal income tax liability. Middle income taxpayers will receive just 10 percent of this refund, an average of \$53. By comparison, the top quintile of Oregon taxpayers will reap 65 percent of the kicker refund, an average \$348. The wealthiest 10 percent will receive 48 percent, an average \$708 refund.

The same sort of disproportionate impact would be felt by the middle-income if the proposed referendum to increase the amount of federal income taxes subtracted from income on Oregon tax returns passes in November, 2000. The average tax cut for middle-income Oregonians would be \$24 a year. The wealthiest 20 percent (having an average household income of \$132,000 a year) would receive 57 percent of the benefit and see their tax bills reduced by an average \$166. At the same time, the state would have less revenue to meet its obligations to education and workforce and economic development.

Oregon Center for Public Policy. Jeff Thompson and Charles Sheketoff. (September, 1999). *When Prosperity Passes By: Middle-income Oregonians, Tax Cuts, and the Economic Prosperity of the Late 1990s*. [Online] Available <http://www.ocpp.org/1999/es990904.htm>

Income Disparity

According to the Center on Budget and Policy Priorities (a nonpartisan research organization and policy institute that conducts research and analysis on a range of government policies and programs, supported primarily by foundation grants "The after-tax income gaps between those with the highest incomes and other Americans have widened sharply since 1977 and are projected in 1999 to reach their widest point in recent decades."

This income discrepancy has been increasing in Oregon for nearly two decades. According to the state-by-state analysis:

1. The richest 20 percent of families with children had average incomes over 10 times as large as the poorest 20 percent of families
2. The richest 20 percent of families with children had average incomes 2.6 times as large as the middle 20 percent of families
3. The long-term economic growth of the past two decades hasn't been shared evenly:
 4. The average income of the poorest fifth of families fell by \$2,580 between the late 1970s and the mid-1990s, from \$12,210 to \$9,630
 5. The average income of the middle fifth of families fell by \$4,850 between the late 1970s and the mid-1990s, from \$42,442 to \$37,590
 6. The average income of the richest fifth of families increased by \$12,510 between the late 1970s and the mid-1990s, from \$85,080 to \$97,590

7. The gap between the top fifth of families and the bottom fifth of families increased between the mid-1980s and the mid-1990s faster in Oregon than in all but 15 states

Source: Center on Budget and Policy Priorities. "Gaps Between High-Income Americans will Reach Record level in 1999, Analysis Finds" News Release. September 4, 1999. www.cbpp.org/9-4-99tax.htm

Center on Budget and Policy Priorities. (December 16, 1997). *Pulling Apart: A State-by-State Analysis of Income Trends: Oregon*. [Online] Available www.cbpp.org/pa-or.htm

Oregon Labor Surplus Areas Grow

For the third year in a row, the number of "labor surplus areas" has grown in Oregon. The federal Department of Labor publishes a list of counties and cites whose unemployment rate has remained well above national averages for two years. The number of labor surplus areas in Oregon has grown from 16 in October, 1996, to 27 in October, 1999. Tillamook and Columbia counties were added in October, 1999 and Sherman County was removed.

Most of rural Oregon is now represented on this list, underscoring again the disparity between economies in the state.

The 27 labor surplus areas are all of Baker, Clatsop, Columbia, Coos, Crook, Curry, Deschutes, Douglas, Grant, Harney, Hood River, Jackson, Jefferson, Josephine, Klamath, Lake, Lincoln,

Linn, Malheur, Morrow, Tillamook, Umatilla, Union, Wallowa, Wasco, and Wheeler Counties and the City of Springfield in Lane County.

Source: Oregon Center for Public Policy. OCPP News Release "Oregon Labor Surplus Areas Grow, Again Tillamook and Columbia Counties Added to List" October 27, 1999. [Online] Available <http://www.ocpp.org/1999/nr991027.htm>

State Government Ill-Prepared for Recession

The Center on Budget and Policy Priorities released a report, "When it Rains, It Pours" in March, 1999, which examines the fiscal health of 48 state governments.

Oregon was one of the 11 states found to fall short in available reserves by more than 20 percent of fiscal year 1999 expenditures. Oregon's projected shortfall is 29 percent, second only to Idaho's (33 percent). The study computed the level of reserves each state would need (more than 25 percent for Oregon) to weather the hypothetical next recession without either cutting spending or raising taxes.

Forty-five states have budget stabilization or "rainy day" funds. Oregon is one of five states that does not.

Oregon is one of eight states that have reduced their general fund revenues by 5 percent or more through tax cuts since 1993.

Oregon is one of the fastest growing states in the nation. Such growth is often accompanied by relatively high expenditure growth trends. When revenue growth slows during the projected recession, these states tend to develop larger than average gaps between available revenues and projected expenditures. Larger reserve balances, in turn, are necessary to fill those gaps.

Without reserves, states will be forced to turn to either large tax increases or dramatic cuts in services--at a time when residents are least able to deal with such measures.

Source: Center on Budget and Policy Priorities. (March, 1999). *When it Rains, It Pours: A Look at the Adequacy of State Rainy Day Funds and Budget Reserves*. [Online] Available <http://www.cbpp.org/3-11-99sfp.htm>

SOCIAL ISSUES

Hunger

Despite claiming the best economy in the nation, Oregon is the state with the highest percentage (6.8 percent) of hungry households in the country. The U. S. Department of Agriculture defines "hungry" as meaning "one or more household members were hungry at least some time during the year due to inadequate resources of food."

In terms of "basic food insecurity" (defined as "[a household] did not always have access to enough food to meet basic needs.") Oregon ranked fifth, at 16.8 percent.

This ranking is puzzling to analysts, particularly in light of Oregon's relatively low poverty rate (more than two percentage points below the national average), its food stamp use rate (below the national average and strikingly low in relationship to the food insecurity rate), and its relative prosperity.

Oregon Food Bank officials have seen the results of this situation: they've experienced a 14 percent increase in demand for emergency food boxes.

Additional research is needed, according to USDA officials. They do theorize, however, that the anomaly seen in Oregon is caused by a combination of high housing costs, lack of family support structure, foul-up's in the food stamp program, and the lack of community nutrition programs. Local observers also note that the overall boom in the Northwest's economy hasn't been felt in most rural areas.

Source: U. S. Department of Agriculture. Food and Rural Economics Division, Economic Research Service Food Assistance and Nutrition Research Report No. 2 (FANRR-2) *Prevalence of Food Insecurity and Hunger, by State, 1996-98*. Mark Nord and Kyle Jemison September, 1999.

The Oregonian. Portland, Oregon. October 14, 1999. A01. Street Final Edition.

Welfare

While long term projections aren't available, the Adult and Family Services Division of the Oregon Department of Human Resources periodically publishes statistics about the state of public assistance. Here are some highlights from the latest issue of *Welfare Data* (March, 1999):

1. Job placements from the JOBS Program fell in January 1999 to the lowest level since January, 1995. Placements for the first seven months of the fiscal year (July through January) are down 9% compared to the same period in the previous fiscal year.
2. This marks the third year in a row that January's job placements lagged behind December's. Before federal welfare reform, January's job placement repeatedly exceeded December's.
3. Job placements as a percent of JOBS participants declined by one-third in January. Only 5.4 percent of JOBS participants found jobs in January as compared to a monthly average of 8.1 percent for the first six months of the fiscal year.
4. The average starting wage for full-time job placements in the quarter ending September, 1998, was \$7.05 an hour, down from \$7.08 the previous quarter. Over one-half the jobs were at minimum wage (38 percent) or within one dollar of minimum wage (20 percent). Average starting wages are expected to increase when the higher (\$6.50 an hour) minimum wages goes into effect January 1, 1999.
5. Nearly one-third of job placements was in part-time jobs. Such jobs are rarely adequate to lift a family out of poverty.

6. Less than 7 percent of the single parent families on public assistance had any earning from employment.
7. The state's effort to establish paternity in order to begin the process of collecting child support declined by 15 percent from the previous year.
8. Fewer families are enrolled in the state's childcare subsidy program. With the cash assistance caseload down by over 10 percent from the previous fiscal year, there should be more families enrolled in the program, not fewer.

Source: Oregon Center for Public Policy. (March, 1999). *Welfare Data...A Look at the Numbers*. [Online] Available <http://www.ocpp.org/1999/WD3-99.htm>

Health

Health departments in every state conduct the Behavior Risk Factor survey (BRFS). The survey consists of approximately 120 questions administered through a random-digit dialed survey. Results are then weighted by the Centers for Disease Control and Prevention to produce a statistical representation of adult Oregonians' health-related behaviors.

The complete report makes interesting reading. A few highlights:

1. Oregon and Washington are the least sedentary states in the nation...which turns out not to mean much. The rest of the nation gets an F in this category; we get a D.

2. Oregonians fall in the median range for their overweight status.
3. Only Hawaii and California had lower rates of non-use of seatbelts than Oregon.
4. When compared to other states, Oregon was 18th in reporting drinking and driving and 25th for acute drinking behavior. When it came to chronic drinking (60 or more drinks in a month) Oregon was higher than 37 other states.
5. Oregon has done a little better than other states in terms of percentage of residents who smoke tobacco (23.3 percent).
6. Nearly 24 percent of Oregonians have hypertension. Thirty-nine states had lower percentages than Oregon.
7. Thirteen percent of Oregonians have no health insurance.

Source: Oregon. Oregon Health Division. Oregon Health Trends Newsletter. Issue 48. December, 1997. [Online] Available <http://www.ohd.hr.state.or.us/cdpe/chs/newsltr/oh48/trends48.htm>

The Oregon Health Plan was designed to provide Medicaid coverage to all Oregon families with incomes below the federal poverty level. The Legislative Assembly is considering lowering OHP eligibility to 80 percent of poverty in order to divert \$15.6 million to other areas in the state budget. This would translate in to about 10,000 Oregonians losing coverage. Ironically, as Oregon's minimum wage has increased, more families are failing to meet eligibility requirements. At the \$6.50 per hour level, two-person households become ineligible. The average starting wage for those attempting to move off welfare is \$7.30 per hour. If eligibility is reduced to the 80 percent level, no family with one wage earner at \$7.30 an hour

and fewer than five people would be eligible for the Oregon Health Plan.

Source: Oregon Center for Public Policy. *The Impact of Reducing Basic Oregon Health Plan Eligibility to 80 Percent of Poverty*. [Online] Available <http://www.ocpp.org/1999/rpt990615.htm> [June, 1999].

Prisons

The total prison population was 9,246 on July 1, 1999. It is forecast to grow by 17 percent to 10,864 by July 2001. It is forecast to grow by 32 percent to 12,175 by July 2003. The July 2009 population is forecast to be 14,676. This is 5,430 beds or 59 percent higher than July 1999.

About half of the total growth is directly or indirectly due to the passage of Ballot Measure 11. BM 11 mandates minimum sentences for any of 21 violent crimes. The sentences range from 70 to 300 months.

Senate Bill 1145 took effect in January 1997. The law places felons sentenced to 12 months or fewer in county custody, or "Local Control" (LC). These offenders can be convicted of a new crime, revoked from felony community supervision, or sanctioned to longer than 30 days. The LC population is funded by the Department of Corrections.

The total LC population was 1,801 on July 1, 1999. It is forecast to increase by 2 percent to 1,842 by July 2001. It is forecast to grow by 5 percent to 1,885 by July 2003. The July

2009 population is forecast to be 2,052. This is 251 beds or 14 percent higher than July 1999. The current LC population forecast is 38 beds or 2 percent lower than the previous forecast for July 2001. The difference is 78 beds or 4 percent lower as of July 2003.

Source: Oregon. Office of Economic Forecast. *October 1999 Oregon Corrections Population Forecast*. [Online] Available <http://www.oea.das.state.or.us/pdf/pris1099.pdf>

Youth Corrections Issues

Projections for youth are different in kind than for adult offenders because there aren't sentences in the juvenile justice system. A youth may be committed to the Oregon Youth Authority until age 25, but there is no minimum time to be served in "close custody" (defined as youth housed in secure facilities). Consequently, the OYA can manage the population under its care and prevent overcrowding. This forecast does not include youth in residential treatment, group homes, and foster care.

The total close custody population is projected to increase 16 percent between July, 1999 and July 2003, from 1,116 beds to 1,293.

Several factors will impact the forecast. Youths aged 15 to 17 can be treated as adults if charged with certain crimes. The Ballot Measure 11 and Waived population is projected to grow by 33 percent by July 2003. Beds reserved for juveniles

convicted of serious felonies are projected to grow by 7 percent by July 2003. Beds are also set aside for parole violators and those who have committed new crimes and don't fall in other categories. New crime commitment are projected to grow 9 percent, while parole violators are forecast to remain stable.

Source: Oregon. Office of Economic Forecast. *Oregon 1999 Youth Authority Close Custody Forecast*. [Online] Available <http://www.oea.das.state.or.us/pdf/oya1099.pdf>

EDUCATION IN OREGON

The *1999 National Education Goals Report* reports on 27 national and 34 state-level indicators used to measure progress toward the eight National Education Goals. Oregon's progress is summarized below:

I. HIGHEST-PERFORMING

Oregon placed among the highest-performing states in the nation on seven measures of progress during the 1990s:

Goal 1: Ready to Learn

1. the percentage of infants born at low birthweight (5%);

Goal 4: Teacher Education and Professional Development

2. the percentage of public secondary school teachers who hold a teaching certificate in their main teaching assignment (97%);

3. the percentage of public school teachers with training to teach limited English proficient students (22%);

Goal 5: Mathematics and Science

4. the state's international standing in 8th grade science achievement (only Singapore outperformed Oregon);

5. the percentage of degrees earned by minority students that were awarded in mathematics and science (50%);

Goal 6: Adult Literacy and Lifelong Learning

6. the percentage of U.S. citizens who reported that they registered to vote (76%); and

7. the percentage of U.S. citizens who reported that they voted (64%).

II. MOST-IMPROVED

Oregon placed among the most-improved states in the nation on 2 measures of progress during the 1990s:

Goal 5: Mathematics and Science

1. increasing the percentage of degrees earned by all students that were awarded in mathematics and science; and

2. increasing the percentage of degrees earned by minority students that were awarded in mathematics and science.

III. AREAS OF IMPROVEMENT

Oregon improved on 8 measures of progress toward the Goals during the 1990s:

Goal 1: Ready to Learn

1. Oregon reduced the percentage of infants born with one or more of four health risks (from 39% in 1990, to 36% in 1997).

2. Oregon increased the percentage of mothers who received early prenatal care (from 76% in 1990, to 81% in 1997).

3. Oregon increased the number of children with disabilities enrolled in preschool (from 23 per 1,000 3- to 5-year-olds in 1991, to 46 per 1,000 3- to 5-year-olds in 1998).

Goal 3: Student Achievement and Citizenship

4. Oregon increased the percentage of public school 8th graders who were proficient in mathematics (from 21% in 1990, to 26% in 1996).

5. Oregon increased the numbers of Advanced Placement examinations receiving grades high enough to qualify students

for college credit. (The number of AP exams receiving a grade of 3 or higher increased from 40 per 1,000 11th and 12th graders in 1991, to 50 per 1,000 11th and 12th graders in 1999.)

Goal 5: Mathematics and Science

6. Oregon increased the proportion of degrees earned by all students that were awarded in mathematics and science (from 41% in 1991, to 47% in 1996).

7. Oregon increased the proportion of degrees earned by minority students that were awarded in mathematics and science (from 41% in 1991, to 50% in 1996).

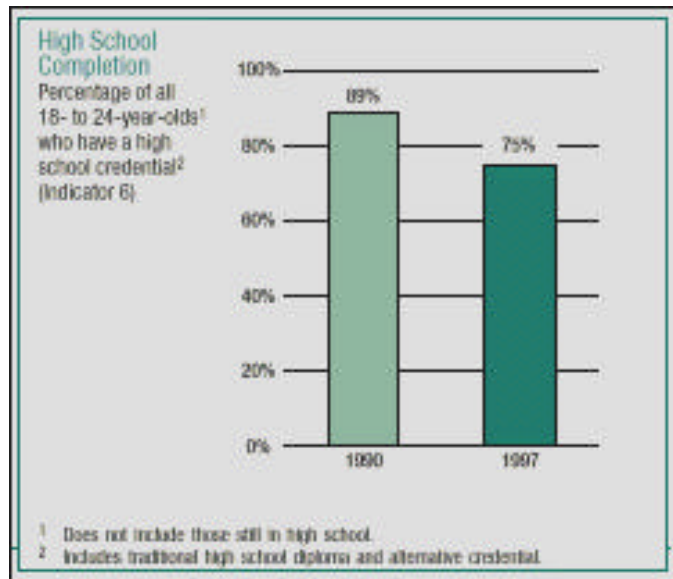
8. Oregon increased the proportion of degrees earned by female students that were awarded in mathematics and science (from 37% in 1991, to 45% in 1996).

IV. AREAS OF DECLINE

There are 4 measures of progress where Oregon's performance has declined during the 1990s:

Goal 2: School Completion

1. The high school completion rate among 18- to 24-year-olds decreased from 89% in 1990, to 75% in 1997.



Goal 6: Adult Literacy and Lifelong Learning

2. The percentage of high school graduates who immediately enrolled in college in any state decreased from 54% in 1992, to 52% in 1996.

Goal 7: Safe, Disciplined, and Alcohol- and Drug-free Schools

4. The percentage of public secondary school teachers who reported that student disruptions interfered with their teaching increased from 37% in 1991, to 57% in 1994.

Goal 8: Parental Participation

4. The percentage of public school teachers reporting that lack of parental involvement in their schools is a serious problem increased from 19% in 1991, to 30% in 1994.

Source: National Education Goals Report. *Notes About the 1999 Findings: Oregon*. [Online] Available <http://www.negp.gov/issues/publication/99StateFact/or.htm>

Lottery

Oregonians who favor the lottery out number those who don't two-to-one. Overall, 57 percent of Oregon householders had a favorable response and only 26 percent opposed it. Lower negative ratings (19 percent) were found in Eastern Oregon.

Source: Oregon. Department of Administrative Services. Office of Economic Analysis. (October, 1997). *Oregon Update: Regional Variations - A Summary of Findings from the 1996 Oregon Population Survey*.

OLA 2010 Project External Scan: Resources

I found a number of very fine resources and many are cited in the study. However, there are a few that I thought Oregon library planners would want to know about as they plan their services.

Oregon Population & Demographic Information

Oregon State Library

<http://www.osl.state.or.us/subject/oregon.html>

Very helpful compilation of census and other demographic and economic data, at state, regional, county and city levels.

Local Area Data for Oregon: A Bibliography of Sources

University of Oregon Library

<http://libweb.uoregon.edu/govdocs/localdat.html>

Another very good compilation of print and online resources covering a wide variety of topics (Communications to Travel and Tourism).

Portland State University. Center for Population Research & Census.

The Center provides a number of publications, many available on the Web, based on the research it conducts within the School of Urban and Public Affairs.

<http://www.upa.pdx.edu/CPRC/>

Quarterly Economic and Revenue Forecast

Oregon. Department of Administrative Services.

This quarterly forecast provides information about the economic state of the state. Appendix C provides population forecasts by age and sex.

Regional Economic Profiles

Oregon. Oregon Employment Department. Oregon Labor Market Information System.

This resource offers the "big picture" of a region's economy and labor market. The reports cover recent and historical trends in population, employment, unemployment, and income for 15 different workforce regions.

<http://www.olmis.org/olmisj/PubReader?itemid=00000057>

1999 Oregon In-Migration Study

Oregon. Oregon Employment Department.

Fascinating study of why people move to Oregon, the state of the Oregon economy, and the elements of our population growth.

A Portrait of Older Oregonians, 1997

Howard Wineberg . (1999). Portland State University. College of Urban and Public Affairs. Institute on Aging.

A comprehensive look at the size and characteristics of the elderly in Oregon. A valuable resource for service planners.

Hispanics in Oregon's Workforce 1998

Oregon. Oregon Employment Department.

The first in a planned series of publications about the employment of minorities in Oregon, this publication provides both a history and a current look at Hispanics in the state, distribution, employment trends, and additional information of use of service planners.